



Connected TV (CTV) = connected

Definition:

Connected TV is the technical delivery that describes the streaming of video content on TV devices that are connected to the Internet via Blu-ray players, streaming boxes or -sticks and game consoles, which have integrated Internet functions (e.g., a Smart TV) and are therefore directly connected to the Internet..



Numerous features and access to web-based content enable functionality beyond linear television. Users can access video content from various sources, such as streaming services or video-on-demand providers.

The most important terms related to CTV:

Replay TV

So-called replay ads refer to advertising that is used as part of replay TV. Replay ads are displayed if the normal commercial break is skipped. They cannot be skipped. Currently offered: Pause Ad, Fast-Forward Ad, and Start Ad.

Note by Admeira: Time-shifted viewing varies depending on the channel and target audience. Furthermore, even with time-shifted viewing, a large portion of the advertising is viewed. It is currently unclear when replay ads can be offered on Admeira channels

Streaming-Plattform

Currently, advertising can be partially placed on international or national ad-supported subscription models. An advertising offer for Netflix and Amazon Prime Video is being discussed for Switzerland, but the launch date is unknown. The existing commercial CTV potential here is still untapped.

YouTube

The video platform also offers big-screen advertising, which falls under CTV.

Note by Admeira: It's important to consider the delivery format and targeting used for the ad. Are your video ads running in a high-quality publisher channel or "ROS" (run of site = everywhere)? Regarding the latter delivery option, we would like to point out the danger of so-called "user-generated content."

Web-TV-Apps

Web TV apps like Zattoo and the Blue TV app offer TV channel content live or as broadcast video-on-demand (BVOD) via applications. The apps are available as CTV on the big screen and as TV streaming on all other devices.

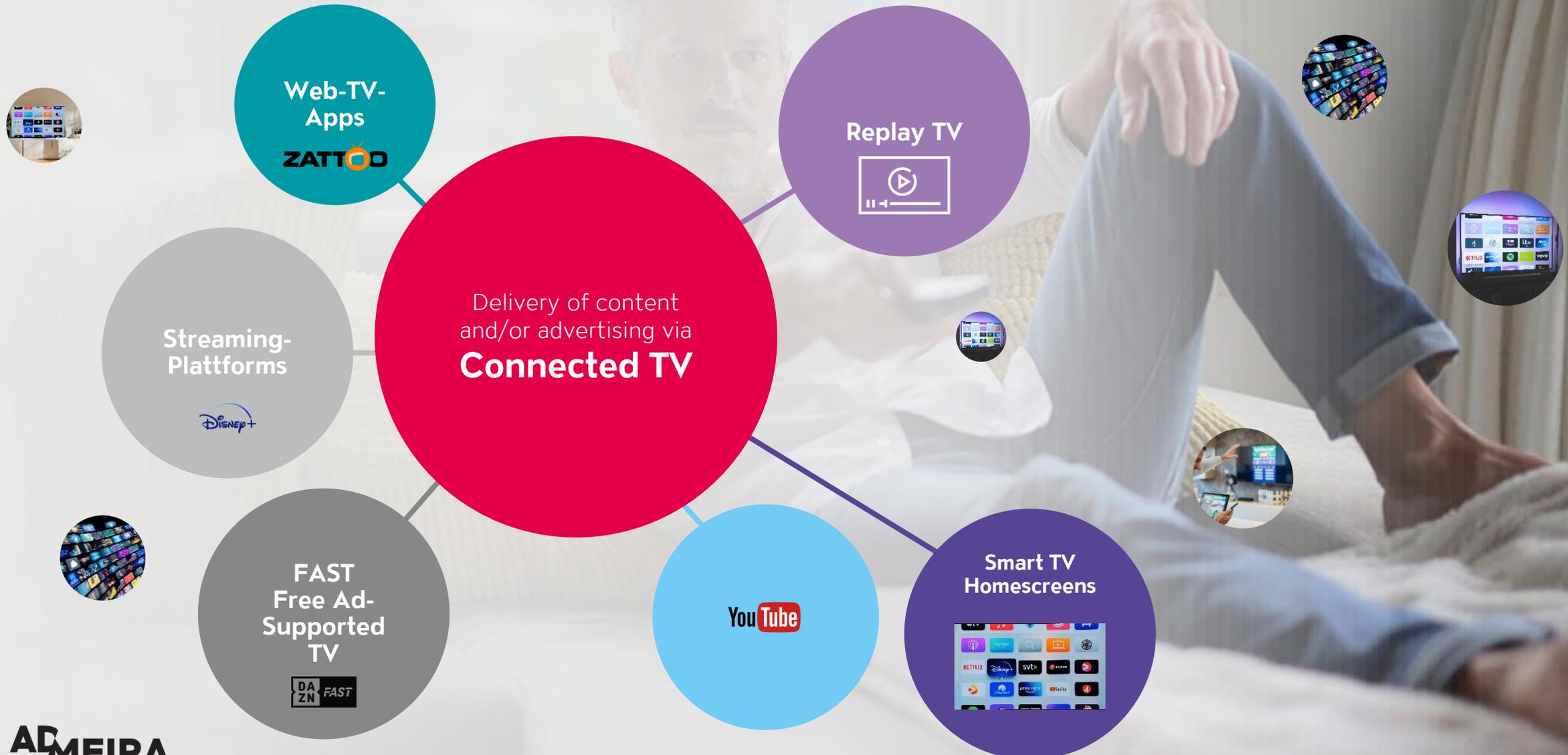
Note by Admeira: Usage on the TV device is included in the TV measurement via audio matching. Technically, it is conceivable to overlay the linear advertising blocks on TV channels – however, this is not permitted in most cases. Web TV apps, for example, offer advertisements that are displayed when the app is launched or when switching between channels. These advertising formats are not included in the TV measurement..

Smart TV Homescreens

Ads on the home screens of smart TVs allow users to be addressed directly but are usually not audio-visual.

Note by Admeira : Advertising on smart TV home screens does fall under CTV. However, since the potential for moving images is limited, we will not discuss this in detail below. In households that watch TV via a set-top box, the home screen is usually overridden by the set-top box's signal. This means that after switching on the TV, the TV menu appears and not the home screen. The number, offers, and arrangement of apps and ads on the home screens vary depending on the provider.

Connected TV Universe



CTV – Connected TV

4 Requirements for CTV

The Devices:
TV
(Big-Screen)

The Connection:
TV is connected to the Internet
(directly or via external device)

Platform/Application:
offers video/TV content.

The Advertisement:
the spots/videos/ads are
delivered via ad servers.

Video offerings via Connected TV can be divided into:

BVOD

Broadcast Video-On-Demand

Content from traditional television channels that can be made available online and on demand.



AVOD / SVOD

Advertising Video-On-Demand Subscription Video-On-Demand

Inhalte, die durch Werbefinanzierung auf
Available ad-free on demand or through
recurring payments.



FAST

Free-Ad-Supported Streaming TV

Free TV streaming channels that are
financed through advertising placements
but do not offer subscription models like
web TV apps.



Web-TV-Apps

Web TV apps such as Zattoo and the Blue
TV app offer TV channel content live or as
broadcast video-on-demand (BVOD) via
applications.



Are Smart TVs = Connected TV (CTV)?



SONY

Panasonic

PHILIPS

- Smart TVs are TV devices that are **directly** connected to the Internet.
- **Only 9% of primary TVs** are exclusively connected to the Internet as Smart TVs.*
- If **consumption via Smart TV e.g. Netflix or DAZN FAST** = video consumption via the delivery type **Connected TV**.
- Using a Smart TV can require different delivery types:
Use of TV channels: Delivery method not via Connected TV
Use e.g. Netflix: Delivery type: Connected TV

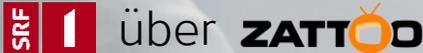
Source: *IGEM Digimonitor 2024

And what about cables, boxes and replay?

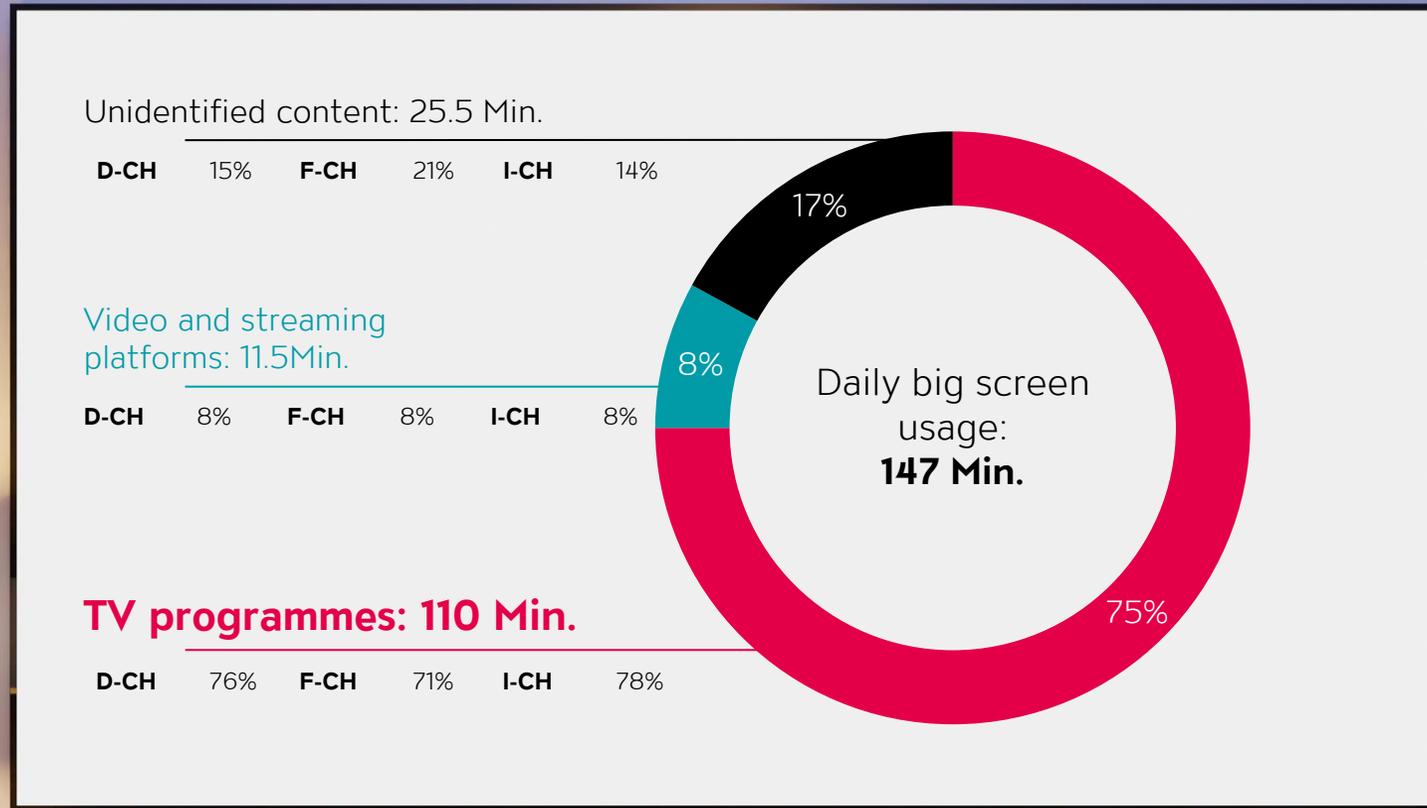


- Set-top boxes are internet-based and offer direct access to live TV channels (not CTV), but also to applications (CTV).
An important form of use via set-top boxes is Replay TV.
- We can distinguish between two scenarios for time-shifted TV use via set-top boxes:
 - 1) A person watches a TV channel with a time-shifted view and sees the **regular commercial block** that was originally broadcast in a linear format. This advertising display does not fall under Connected TV but is recorded normally via MPAG TV measurement. Here, too, only the ads seen - i.e., the advertising impressions generated during time-shifted viewing - are subject to payment.
 - 2) A person watches a TV channel with a time delay and is shown a **Replay Ad**. Since the replay ad is delivered via an ad server, the advertising offer is Replay Ad Connected TV.

Classification of advertising on the TV devices:

   	Type of advertising	Does advertising run under CTV?
	Live Classic advertising block	✗
	TSV Classic advertising block	✗
	Live Classic advertising block	✗
	TSV Classic advertising block	✗
	TSV Replay Ad	✓
	Live The advertising block of SRF 1 is viewed as in linear TV and is not skipped.	✗
	Live The advertising block from SRF 1 is skipped and faded in with advertising from Zattoo as it is skipped.	✓
  	--- Advertising displayed when starting Zattoo or changing channels	✓
  	--- Depending on the provider	✓

Mediapulse Big Screen Data 2024



Source: Mediapulse TV Data, households, use at the TV set, CH, viewing time, day of use, 1,990 households
TV: linear and time-shifted use (up to 7 days after broadcast) of the 400 most relevant TV programmes
Video and streaming platforms: These include, on the one hand, international providers such as YouTube, Netflix, Apple TV+, Amazon Prime, Disney+ and DAZN, with a combined usage time of 9.5 minutes, and, on the other hand, the national web TV platforms from Quickline, Swisscom, Sunrise, Zattoo and Teleboy, with a combined usage time of 2 minutes per person per day. When evaluating these figures, it should be noted that conventional TV programmes can, of course, also be accessed via the platforms mentioned. If these programmes comply with the convention of TV research mentioned above, their usage shares are not assigned to the platforms, but to TV usage.

Unidentified content:

A good 25 minutes, or 17 per cent, of the usage time on the big screen cannot currently be identified and categorised by TV research. It can be assumed, on the one hand, that this is also TV usage, but that it is not recorded as such due to the currency definition of TV research. This could be the consumption of channels that are not referenced for audio matching, or the on-demand use of TV content that was broadcast more than 7 days previously and is accessed either via the corresponding media libraries or via private recording storage. On the other hand, the connected peripheral devices suggest that the big screen is of course also used for gaming or for watching commercial or private films. Finally, it cannot be ruled out that there are offers in the confusing world of streaming platforms that are relevant for Swiss big screens but have not yet been taken into account in the survey.

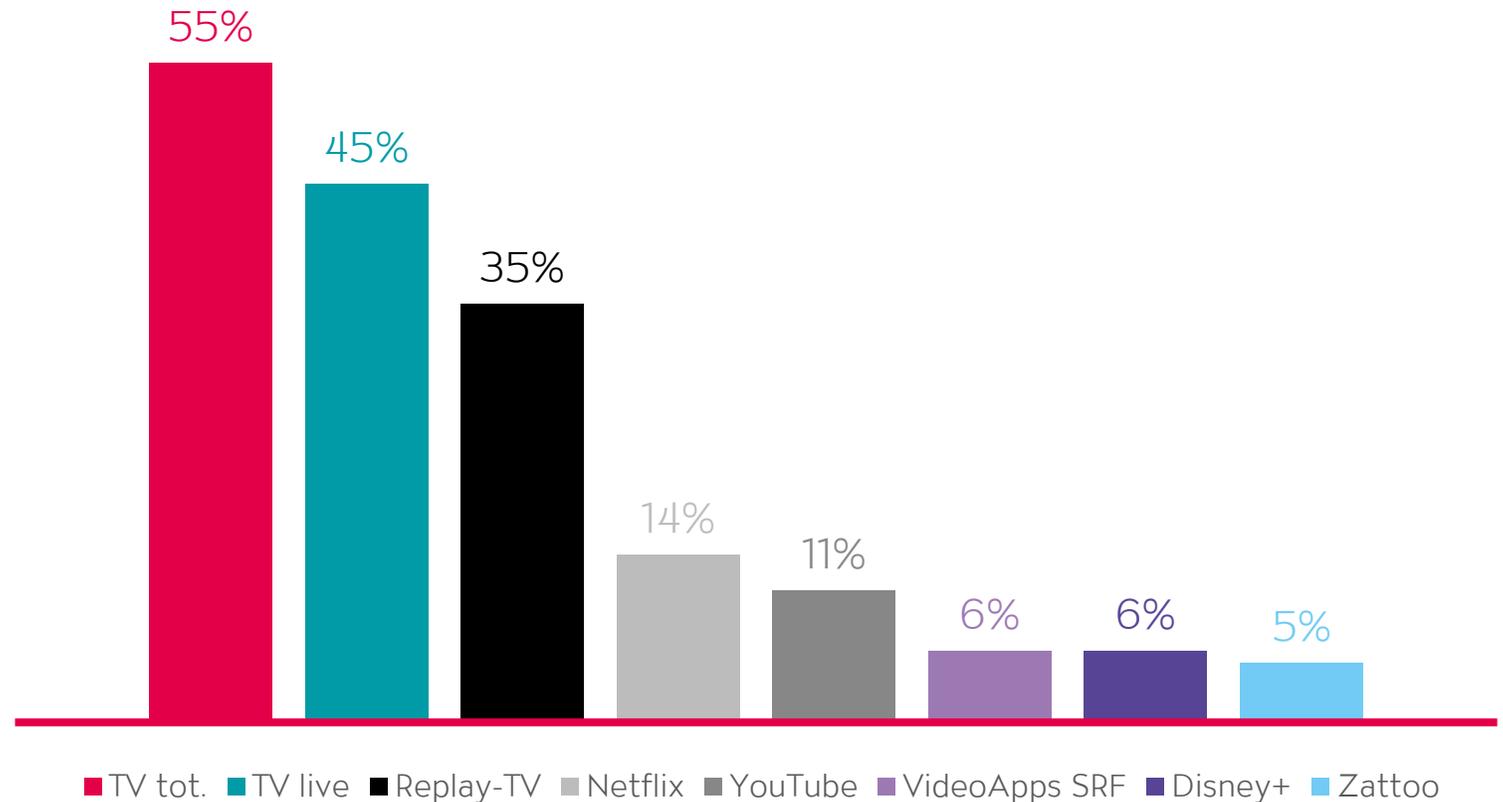
TV on the big screen has the highest usage.

Used daily or almost daily, question: Frage: «How often do you use ... on the TV set?»

Target group: people 15-74



Video content is used via connected TV, but TV has the largest reach via the big screen.

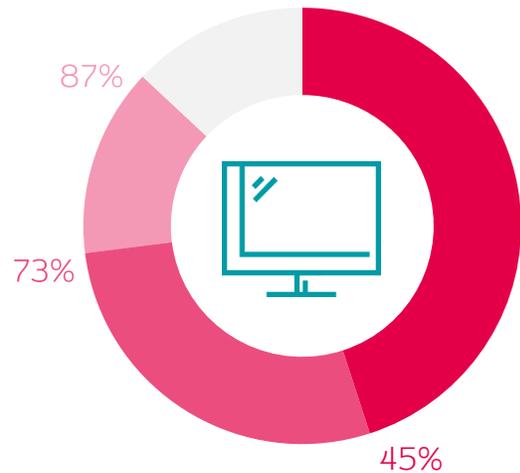


Source: Admeira AdPanel, GfK Switzerland, week 50/2024, GE-CH, 754 respondents in total, 15-74 years

TV live mostly used on TV device

Question: «How often do you watch live television?» on the/ at the...

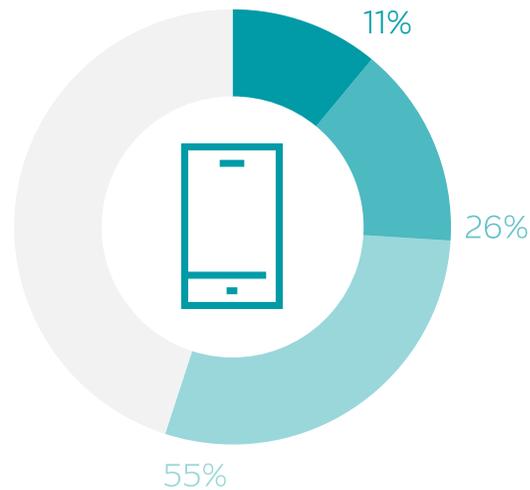
TV-Device (Big Screen)



- Daily use
- Weekly use
- Widest user group

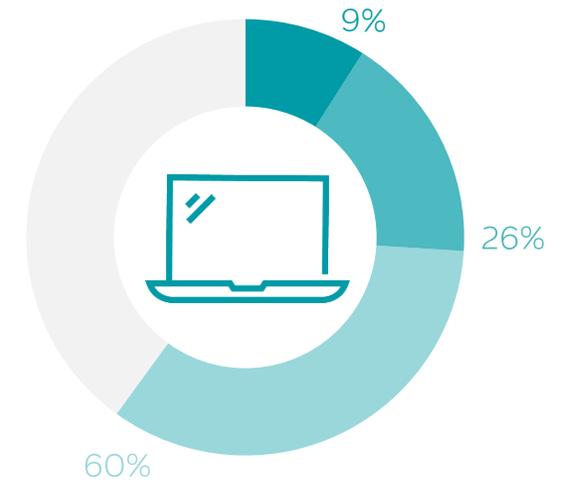
CTV-Potential

Smartphone (Small Screen)



- Daily use
- Weekly use
- Widest user group

Laptop/Tablet/PC (Middle Screen)



- Daily use
- Weekly use
- Widest user group

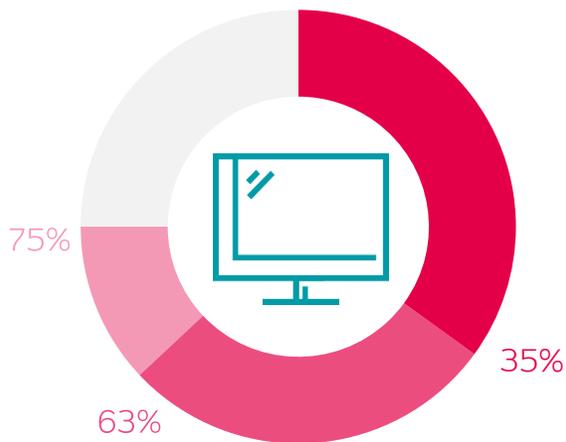
further streaming potential

Source: Admeira AdPanel, GfK Switzerland, Week 50/2024, G-CH, 754 respondents in total, 15-74 years

ReplayTV

Question: «How often do you use time-shifted television?» on the/ at the...

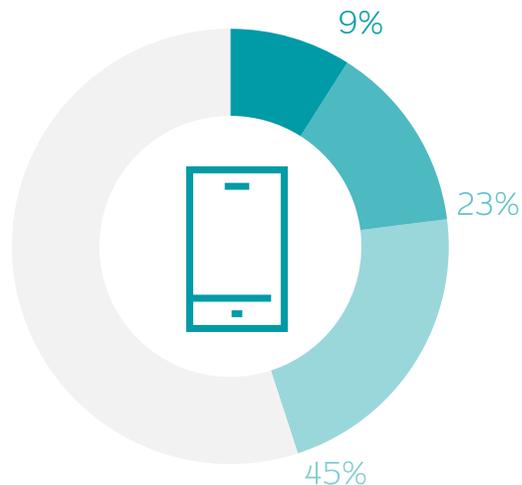
TV-Device (Big Screen)



- Daily use
- Weekly use
- Widest user group

CTV-Potential

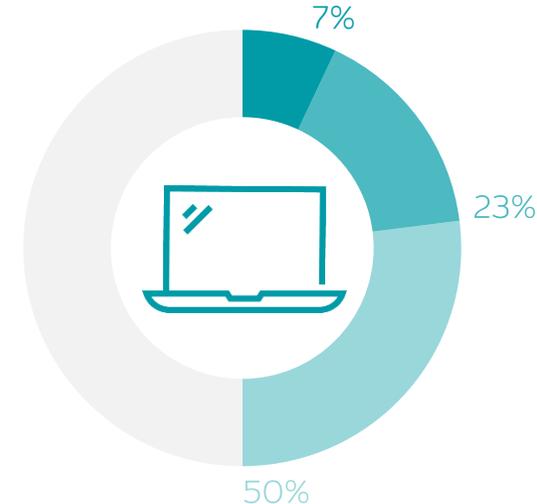
Smartphone (Small Screen)



- Daily use
- Weekly use
- Widest user group

further streaming potential

Laptop/Tablet/PC (Middle Screen)



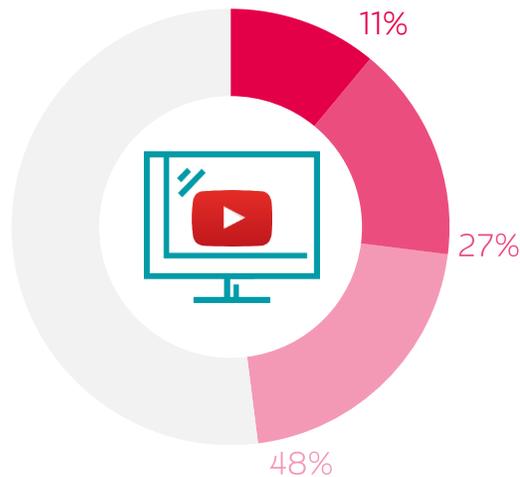
- Daily use
- Weekly use
- Widest user group

Source: Admeira AdPanel, GfK Switzerland, Week 50/2024, G-CH, 754 respondents in total, 15-74 years

YouTube: only little usage on the big screen

Question: «How often do you use YouTube?» on the/ at the...

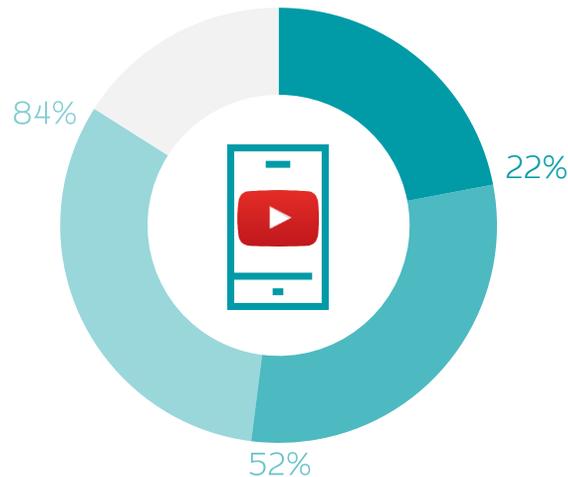
TV-Device (Big Screen)



- Daily use
- Weekly use
- Widest user group

CTV-Potential

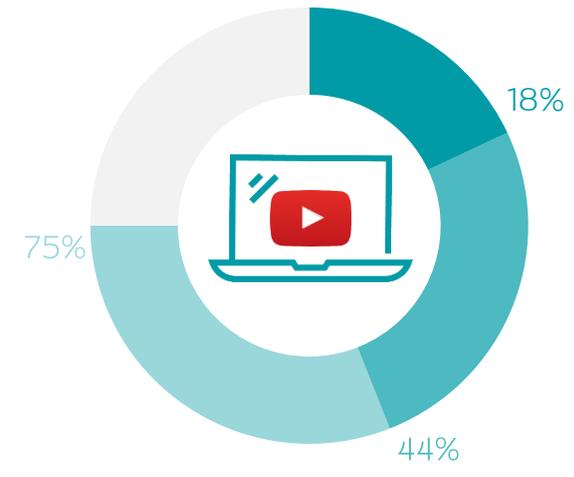
Smartphone (Small Screen)



- Daily use
- Weekly use
- Widest user group

further streaming potential

Laptop/Tablet/PC (Middle Screen)



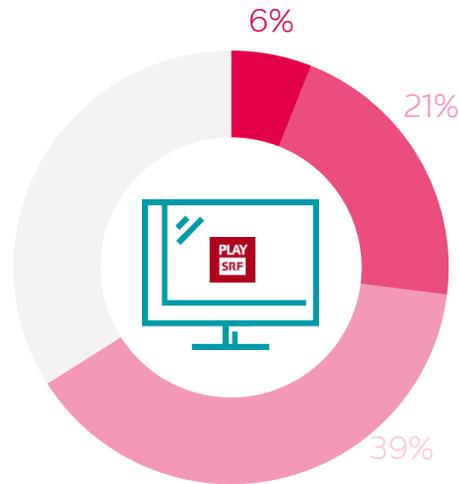
- Daily use
- Weekly use
- Widest user group

Source: Admeira AdPanel, GfK Switzerland, Week 50/2024, G-CH, 754 respondents in total, 15-74 years

Video-Apps from SRF

Question: «How often do you use SRF video apps (Play Suisse, Play SRF)?» on the/ at the...

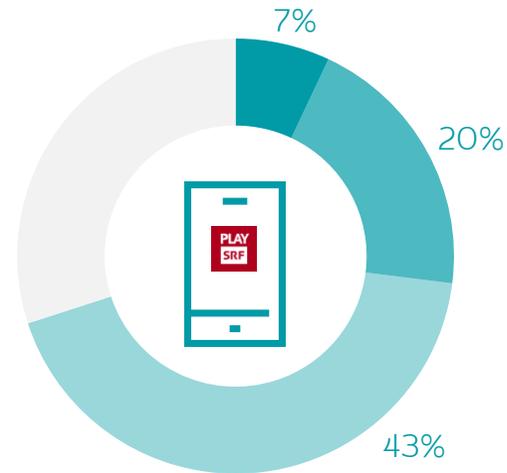
TV-Device (Big Screen)



- Daily use
- Weekly use
- Widest user group

CTV-Potential

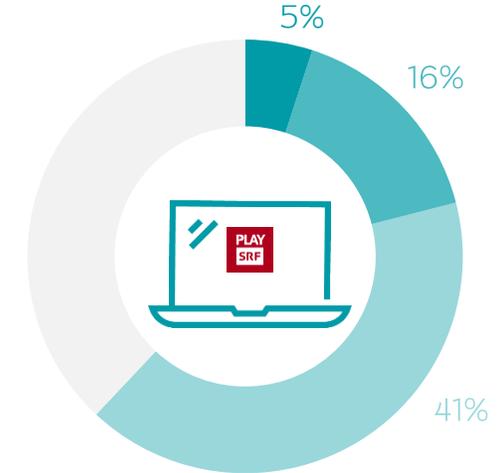
Smartphone (Small Screen)



- Daily use
- Weekly use
- Widest user group

further streaming potential

Laptop/Tablet/PC (Middle Screen)



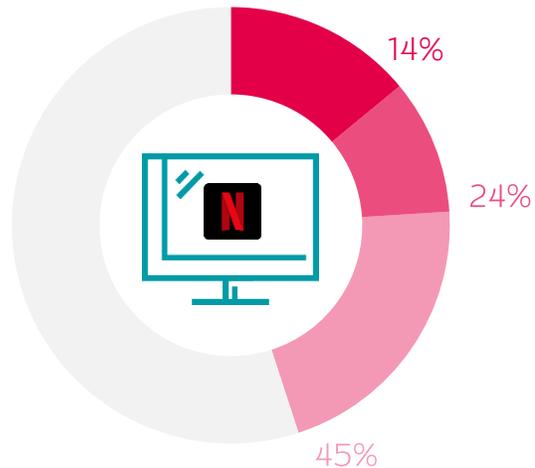
- Daily use
- Weekly use
- Widest user group

Source: Admeira AdPanel, GfK Switzerland, Week 50/2024, G-CH, 754 respondents in total, 15-74 years

Netflix

Question: «How often do you use Netflix?» on the/ at the...

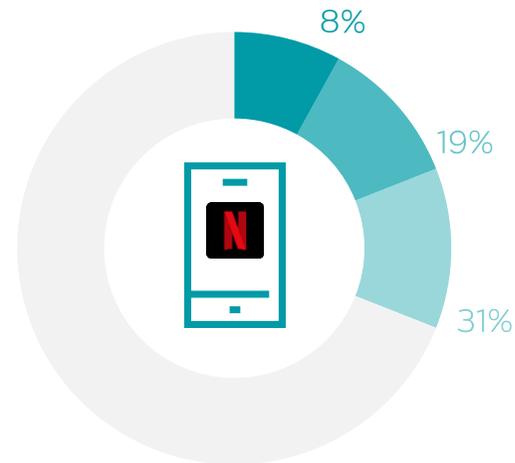
TV-Device (Big Screen)



- Daily use
- Weekly use
- Widest user group

CTV-Potential

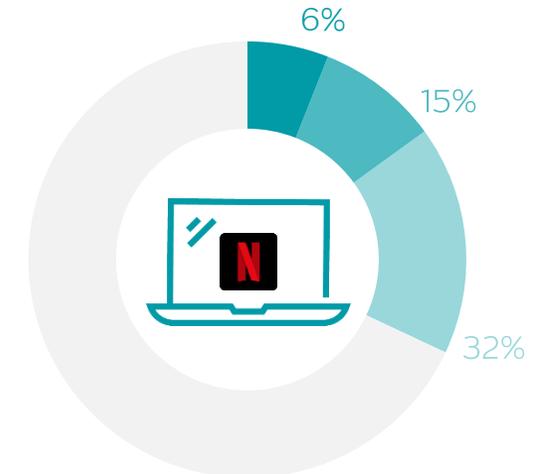
Smartphone (Small Screen)



- Daily use
- Weekly use
- Widest user group

further streaming potential

Laptop/Tablet/PC (Middle Screen)



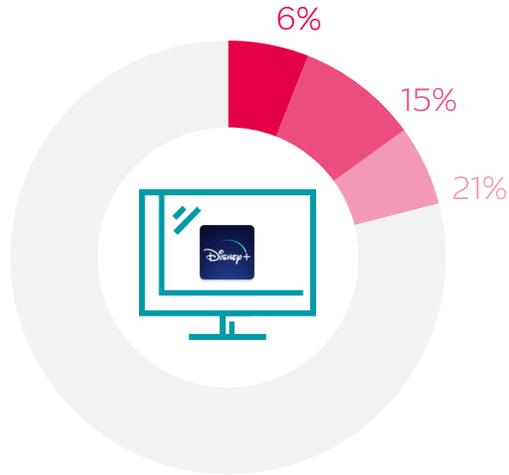
- Daily use
- Weekly use
- Widest user group

Source: Admeira AdPanel, GfK Switzerland, Week 50/2024, G-CH, 754 respondents in total, 15-74 years

Disney+

Question: «How often do you use Disney+?» on the/ at the...

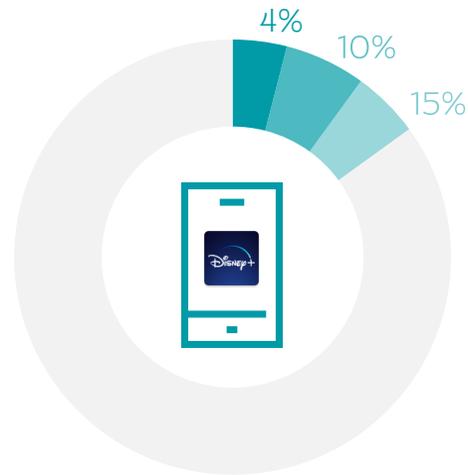
TV-Device (Big Screen)



- Daily use
- Weekly use
- Widest user group

CTV-Potential

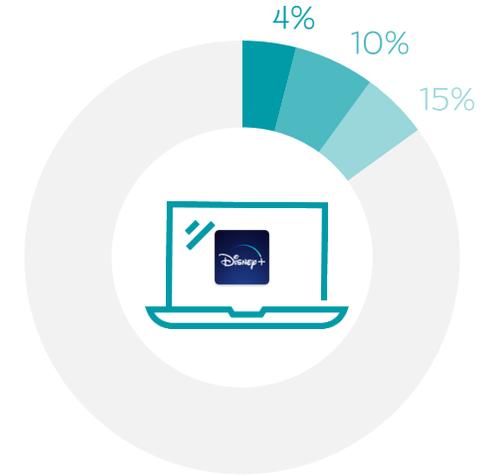
Smartphone (Small Screen)



- Daily use
- Weekly use
- Widest user group

further streaming potential

Laptop/Tablet/PC (Middle Screen)



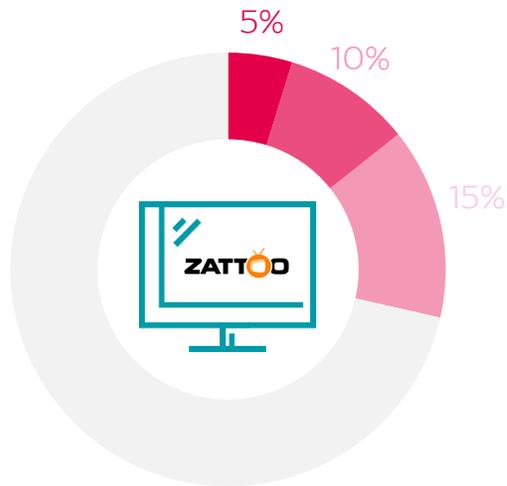
- Daily use
- Weekly use
- Widest user group

Source: Admeira AdPanel, GfK Switzerland, Week 50/2024, G-CH, 754 respondents in total, 15-74 years

Zattoo

Question: «How often do you use Zattoo?» on the/ at the...

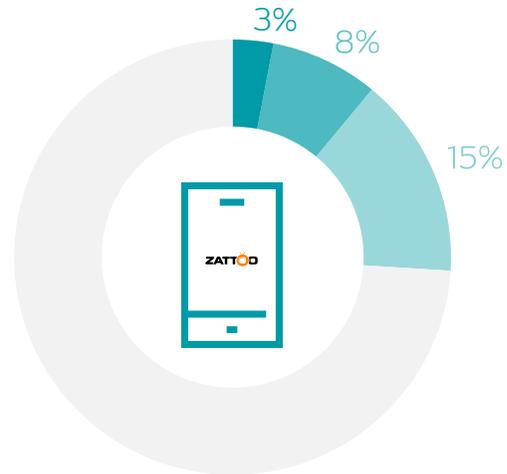
TV-Device (Big Screen)



- Daily use
- Weekly use
- Widest user group

CTV-Potential

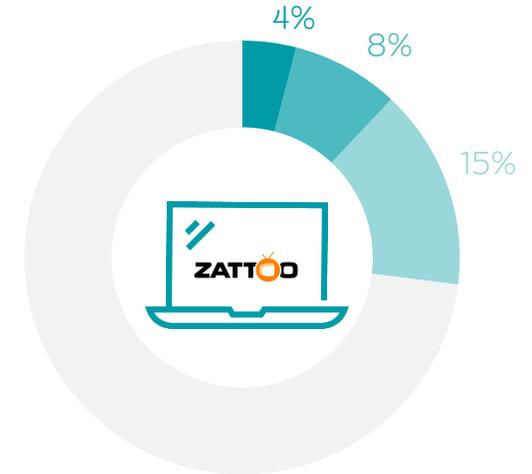
Smartphone (Small Screen)



- Daily use
- Weekly use
- Widest user group

further streaming potential

Laptop/Tablet/PC (Middle Screen)



- Daily use
- Weekly use
- Widest user group

Source: Admeira AdPanel, GfK Switzerland, Week 50/2024, G-CH, 754 respondents in total, 15-74 years

Many people have no idea what CTV is

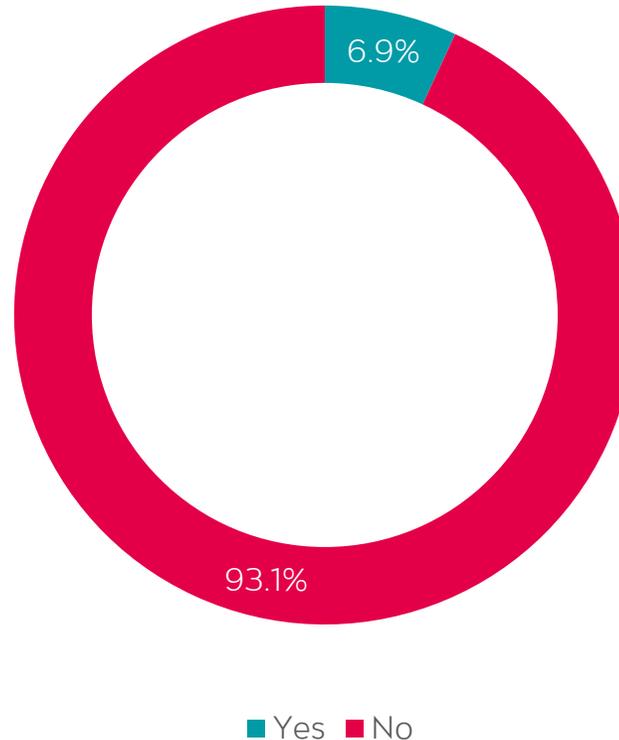
Question: «Have you ever heard of Connected TV (CTV)?»

Target group: People 15-74 years



Studies on CTV usage should be conducted in a way that people can understand.

Hardly anyone realizes that connected TV is the use of a medium on a TV device.



- Studies on Connected TV (CTV) have already been published in the Swiss advertising market. Some of these studies highlighted the high reach of video content via Connected TV and its advantages.
- In our opinion, usage via CTV should be queried in a way that is understandable to respondents, as previously described, as a platform (using a brand name such as Play SRF, YouTube, or Netflix) on the TV device or "big screen." Consumers in Switzerland currently have little understanding of what "connected TV" means.
- In a separate survey conducted in week 8 of 2025, we asked people in Germany and Switzerland whether they had ever heard of Connected TV (CTV). The results are clear.

Source: Admeira AdPanel, GfK Switzerland, Week 50/2024, G-CH, 754 respondents in total, 15-74 years

Methodical profile

Method

Multi-topic survey in the GfK online bus

Universe

Online population of German-speaking and French-speaking Switzerland, 15-74 years of age in the online user group. (Usage: several times a day, daily or almost daily, several times a week, about once a week or less than once a week)

Sampling procedure

Population representative according to sociodemographic characteristics, random quota method

Odds

Gender, age (3 groups), WEMF areas (3 groups)

Weighting

The data were weighted according to the following criteria: Gender x age (4 groups), employment (4 groups), education (2 groups), super shared flat (7 groups in German-speaking Switzerland), type of settlement (2 groups). Weighting ensures that the data are optimally adapted to the structures of the population.

Sample

CTV-Usage: G-CH: 754

CTV-Awareness: G-CH: 766

Field

CTV-Usage: G-CH: week 50 / 2024

CTV-Awareness: G-CH: week 8 / 2025

Implementing institute

GfK Switzerland AG, Rotkreuz

Thank you.

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