The Living Room Study

2026 Edition

by RTL AdAlliance

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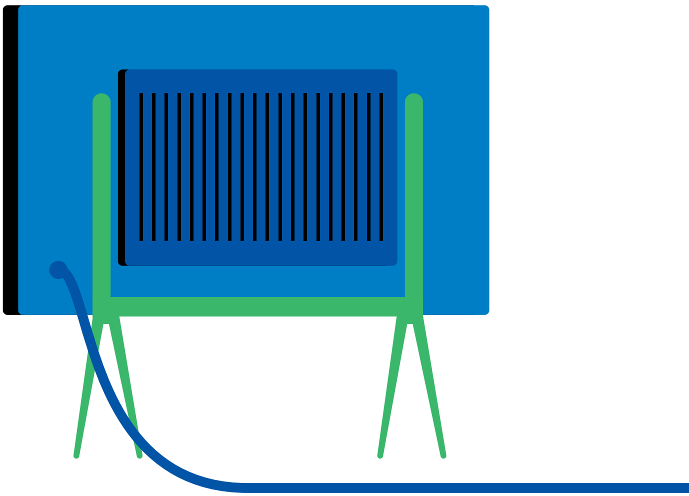


Total Video thrives through collaboration

Stéphane Coruble
CEO
RTL AdAlliance

I am delighted to present the 5th edition of our leading research that looks at video consumption habits in living rooms in Europe and beyond.

In recent years, we have observed how quickly technology has reshaped the viewing environment. Smart TVs have spread across households. New streaming platforms have evolved. Global players have continued to be assertive in their strategies. And yet, despite this acceleration, something has remained remarkably stable: Europe's relationship with television.
This year's insights show it clearly. Seventy per cent of Europeans watch video on their TV every day. Eighty-six percent say the living room is the main space where they watch video content, regardless of platform. And nearly half of viewers – 45 per cent – still watch with someone else, making TV one of the main shared experiences in our homes.

These habits tell us something essential. In Europe, the living room is more than a place of entertainment. It is a space where people experience content together. Co-viewing remains a defining part of how Europeans watch television and streaming platforms. Nearly half of viewers still choose to watch with someone else, turning the main screen into a shared moment rather than a solitary routine. This collective way of watching shapes the atmosphere of the living room. It brings conversation, emotion, and a sense of presence, which individual viewing cannot recreate. Even as new platforms emerge, the television screen remains the anchor of this shared experience.

> **Europe's strength does not come from size, but from unity. Collaboration is our competitive advantage.**

Our strength does not come from size. It comes from unity. Europe has proven time and again that collaboration works. Broadcasters, publishers, and media companies can achieve far more together than they can alone. Alliances have already reshaped the market. They help us stand firm against global giants. They allow us to preserve the diversity and quality of European media. They ensure advertisers continue to have access to trusted and transparent environments. And most importantly, they reflect how Europeans think, work, and build: collaboratively.

This is a spirit we embrace at RTL AdAlliance. Our mission has always been to simplify complexity and to give advertisers a clear, efficient, and premium route into Europe's most influential audiences. But that mission only succeeds when the industry moves forward collectively. Cross-market partnerships, technological alignment, smarter measurement, and shared innovation will define the next era of Total Video. And Europe is uniquely placed to lead this transition, precisely because of its collaborative DNA.

This year's study is a reminder that shared strength matters more than ever. The living room is Europe's beating heart of video. The challenge ahead is to match that viewer loyalty with the same level of collaboration behind the scenes. When we unite, we do more than compete. We create a sustainable, resilient, and thriving media ecosystem for the future.

How we carried out the study

The 2026 Living Room Study set out to capture how audiences across 17 countries watch video today – and how those habits are shifting.

The quantitative research was carried out between 19 January and 4 February 2026, using an online questionnaire. This year's edition covers three continents, with two new markets added: Austria, Belgium, China (new), Denmark, Finland, France, Germany, Hungary (new), Italy, the Netherlands, Norway, Poland, Spain, Sweden, Switzerland, the UK, and the US.

Almost 15,000 people aged 18-64 took part, each answering 30 questions. This study dives deeper than previous editions, capturing responses on (almost) every streaming platform available in each market. It enables us to gain insights on over 130 platforms and granular analysis of different streaming categories.

Samples were nationally representative, with between 700 and 1,000 respondents per country, adjusted to population size.

Participants were selected using quota sampling based on age, gender, region, and employment status.

The results presented in this publication are only the start, this data can provide many more detailed insights for different countries and targets.

17

countries covered

Europe (15 countries: Austria, Belgium, Denmark, Finland, France, Germany, Hungary, Italy, the Netherlands, Norway, Poland, Spain, Sweden, Switzerland, and the UK), China, and the US.

±15,000

respondents aged 18-64
surveyed from Jan. 19 to Feb. 4, 2026

130+

streaming platforms were included in the research questionnaire

And many more

The room where it happens

Marion Ranchet
Founder
Streaming Made Easy

www.streamingmadeeasy.com

RTL AdAlliance is pleased to welcome Marion Ranchet, Founder of Streaming Made Easy, as a contributor to this year's Living Room Study. Her highly-regarded perspective on the streaming landscape complements our long-standing expertise. She also guides viewers through the video that accompanies this research and brings the insights to life for an even broader industry audience.

The global media conversation has a favourite word: fragmentation. Audiences are splitting across platforms, attention spans are shrinking and long-form content is being carved into clips for feeds that reward speed over substance.
Ask anyone in the industry and they will tell you this is the defining condition of the business. That is true everywhere but it is not the whole truth.

Viewers agree the landscape has changed. They just do not think it has changed for the better. The Living Room Study shows that 73.6 per cent of Europeans say social media has lost its capacity to create real social connections, the highest of any region in the study. The US is close behind at 72.2 per cent. The platforms built to bring people together did the opposite. And yet, in one room in the house, people still sit side by side, watch the same thing at the same time, and talk to each other when the ads come on. The living room did not need an algorithm to do what social media promised and failed to deliver.

For five years now, the Living Room Study has tracked how Europeans watch video content. Every edition has returned the same core finding: the living room is not losing ground in Europe, it is gaining relevance.

Eighty-three per cent of respondents watch video in their living room, compared with 58 per cent in the United States. These are not the habits of a market in decline. They are the habits of a market that values something the rest of the industry is struggling to recreate: deliberate, present, shared attention.

Attention is the word our industry uses most, and understands least. We measure it as an individual metric, one person, one screen, one impression, but European viewing does not follow that model. Here, attention is collective, it compounds. That changes what an impression is worth, what a brand encounter produces, and what kind of creative actually lands.

What Europe has built around its main screen has no equivalent anywhere else in the world. There is a reason Netflix, Amazon, Disney, and YouTube are seeking partnerships with European broadcasters. This environment, the trust, the consistency, and the audiences who show up and stay, is not something a platform can manufacture through pure scale or spend. It was built over decades of local broadcasting, free-to-air access, and cultural proximity. It is not a legacy position; it is an asset worth protecting and the reason these partnerships exist.

Broadcasters who are smart about it leverage those partnerships to solve their own challenges too: reaching audiences who expect trusted content to be available everywhere, on demand, without friction.

Stephane Coruble, CEO RTL AdAlliance, writes about collaboration as Europe's competitive edge, and he is right. But collaboration works because there is something worth collaborating around. That something is an audience that still pays attention, together, on purpose.
The rest of the world is trying to solve the problem of fragmentation. The pages that follow show why Europe never fully bought into it.

Europeans love to watch video on their TV screens

Europeans show a strong, clear preference for television for daily video viewing.

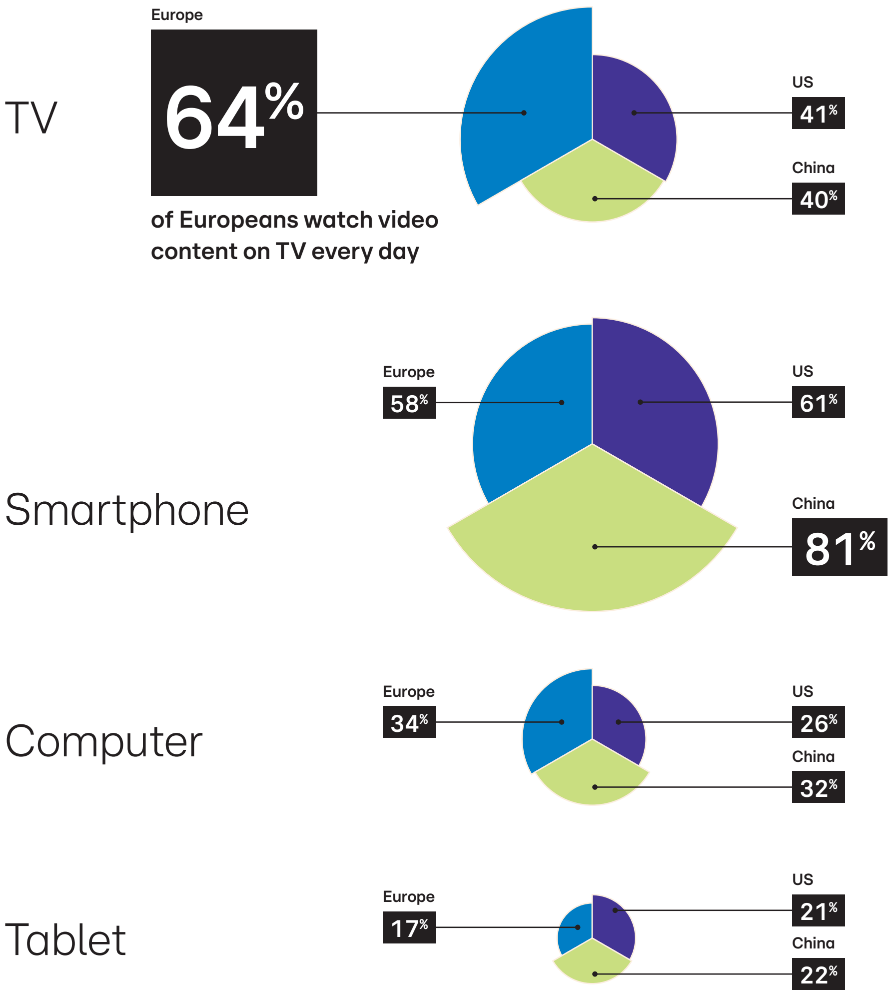
Exploring how we like to watch television, we can see that Europeans choose the big screen as their main device for everyday video viewing, with 64 per cent of Europeans watching video content on their TV daily. This level of engagement is significantly higher than in the US (-23pp) and in China (-24pp).

While tablets, computers, and smartphones play an important role in people's viewing habits, the television still holds a unique position in Europe. It provides a shared, comfortable viewing environment that resonates strongly as 90 per cent of Europeans have at least one TV set at home.
While Europe treats the television as the anchor of daily video viewing, in the US and China, mobile behaviour plays a much larger role. China is especially mobile-first, with smartphones leading video consumption, whereas the US market has a more balanced approach, split across TV set and mobile screens.

90%

of Europeans have a TV at home.

Which devices do you use every day to watch video content?



Basis: total sample N=14,802.

The smart TV homepage is where streaming starts

Streaming in Europe begins on the smart TV homepage, where most viewers turn for effortless access, blending native interfaces with the variety offered by connected devices.

Viewers have a broad choice of ways to access streaming content on their TV. They can use the TV's own interface or connect external devices such as a set-top box, a streaming stick, or a gaming console. This has created a rich and flexible entry point to on-screen entertainment in European homes. However, most Europeans (58 per cent) use their smart TV homepage as their preferred gateway to watching video content on their big screen.

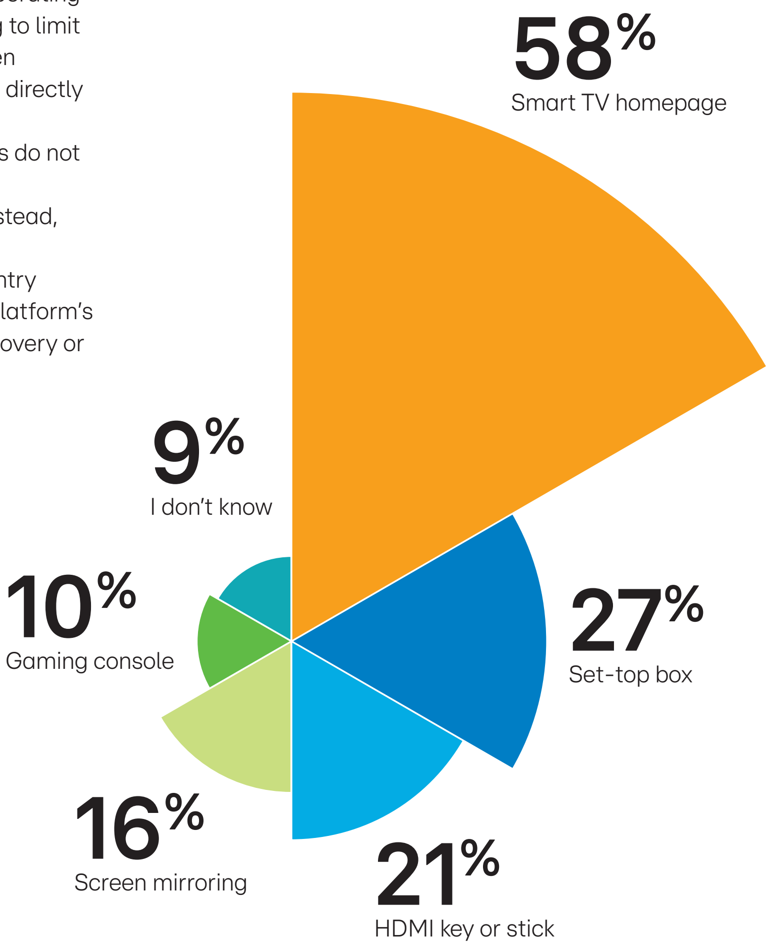
On average, European viewers use 1.3 different devices to access video content on their TV. This compares with 1.5 in the US and 1.8 in China. The European pattern is a balanced mix of native smart TV use and additional devices, reflecting how households combine simplicity and versatility in their viewing habits.

1.3 devices
used on average by Europeans to access video content on their TV.

1.5 in the US
1.8 in China

How are you accessing video content on your TV sets?

Screen mirroring introduces a challenge for TV platforms. Telecom operators and TV operating systems are seeking to limit its use because when content is streamed directly from a computer or smartphone, viewers do not engage with the TV homepage at all. Instead, the personal device becomes the sole entry point reducing the platform's ability to shape discovery or capture data.



Basis: Europe, own a TV set or a Video projector, N=11,257.

The living room is Europe's main viewing hub

The living room is Europe's central viewing hub, the place where most people gather to watch curated content on the big screen and enjoy a shared, familiar experience.

Across Europe, the living room is the heart of video consumption. When asked in which room they watch linear TV most often, respondents overwhelmingly named the living room (86 per cent). In second place was the bedroom with 22 per cent. Europe's preference for the living room is even more pronounced when compared with the US (-20pp) and China (-9pp).

In other locations, viewing is more mobile and more fragmented, with platforms such as YouTube taking precedence.

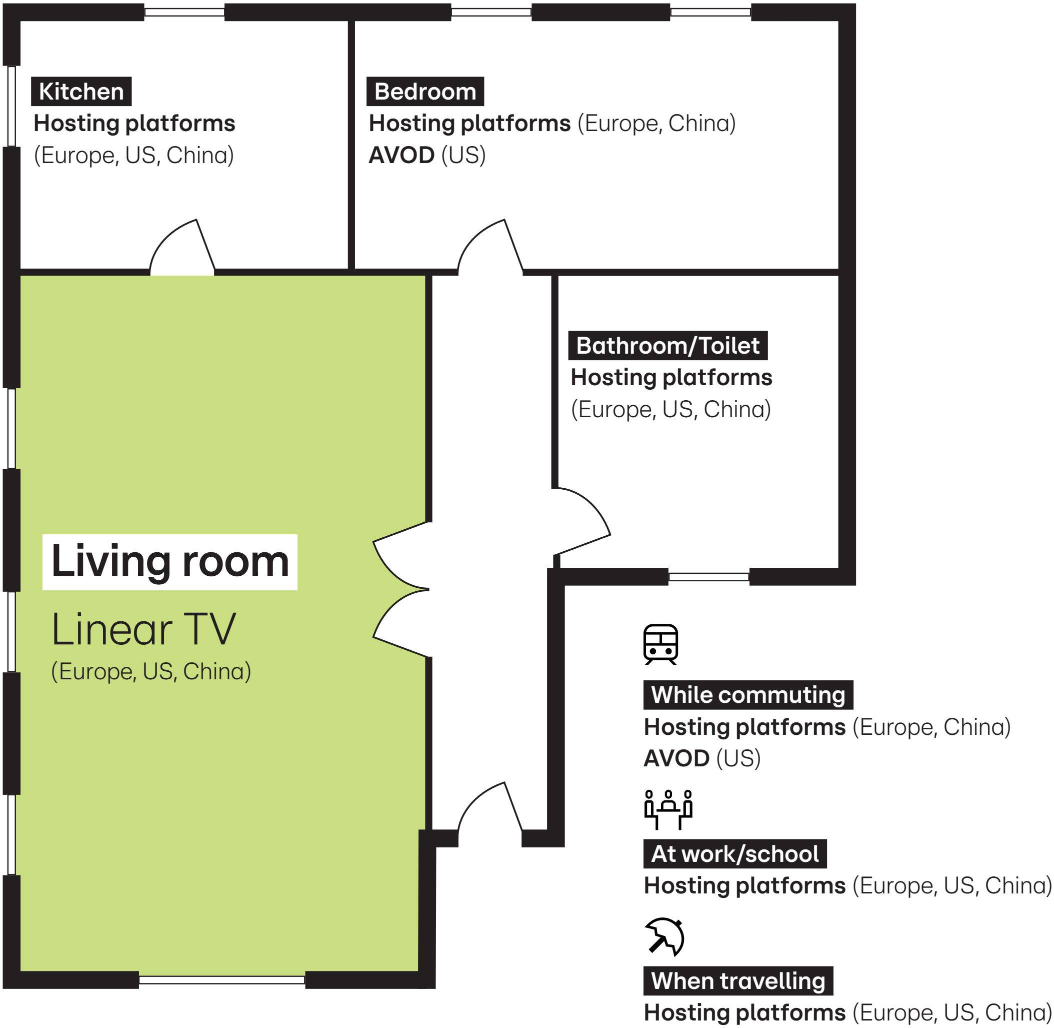
But in the living room, the television set still holds a distinctive place as the shared, familiar backdrop for curated content, underscoring its cultural and domestic relevance across Europe.There is a case to be made that in rooms where a TV is already part of the routine, such as the living room and the bedroom, we naturally gravitate toward watching TV channels and AVOD on those larger screens. When we are on the move, however, our habits shift toward smaller devices and different types of content.

86%

of Europeans watch linear TV mostly in their living room.

The living room is the first choice when it comes to watching video content

Most of the time, where do you watch video content? (Top answer only)



Basis: own a TV set or a Video projector, N=13,393.

Shared viewing brings us closer

Shared viewing remains a familiar part of how Europeans watch TV as 45 per cent choose to watch BVOD platforms with a partner or friend creating moments of connection.

Togetherness shapes how people watch TV in Europe. Even with more platforms and more personal screens available, shared viewing remains part of everyday life. Forty-five percent of Europeans often watch shows on broadcast streaming platforms with someone else, creating a shared moment that feels distinct from watching alone.

This is most pronounced among younger audiences. Almost seven in ten 18–24-year-olds say that watching video content with others strengthens social bonds, showing that co-viewing remains meaningful even for the most digital-native audiences.

These shared moments underline that TV is more than a screen. It is a space where connection happens and where people enjoy experiencing content side by side.

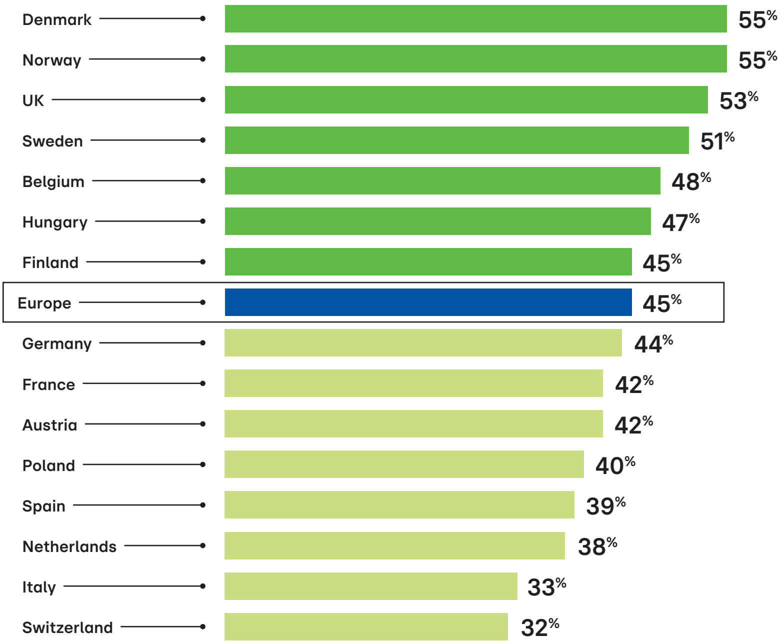
Country focus

72%

of Spanish people agree with the idea that watching video content with other people fosters strong social bonds.

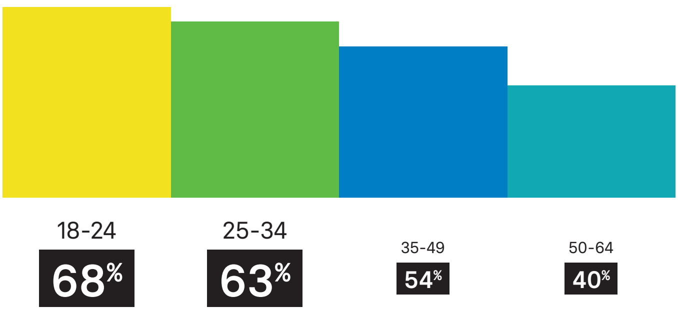
Co-viewing habits differ per market

I often watch BVOD platforms with another person (partner, friend...). Strongly agree.



Co-viewing is especially important for younger audiences

I feel that watching video content with other people fosters strong social bonds. Any agree.



Basis: Europe, own a TV set or a Video projector, N= 11,257.

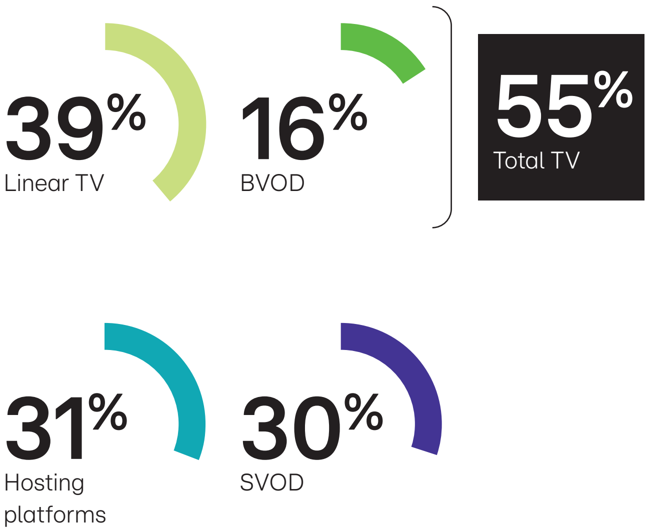
Broadcast content is our go-to

More than half of Europeans watch Total TV on their television set every day, making broadcast content the most regular and familiar viewing choice across the region.

Television leads our daily viewing habits across Europe, as 55 per cent of Europeans watch Total TV daily, whether through linear TV or broadcasters' streaming platforms.

This consistent behaviour shows how broadcast content holds its place as a familiar, habitual destination in an increasingly fragmented streaming landscape.

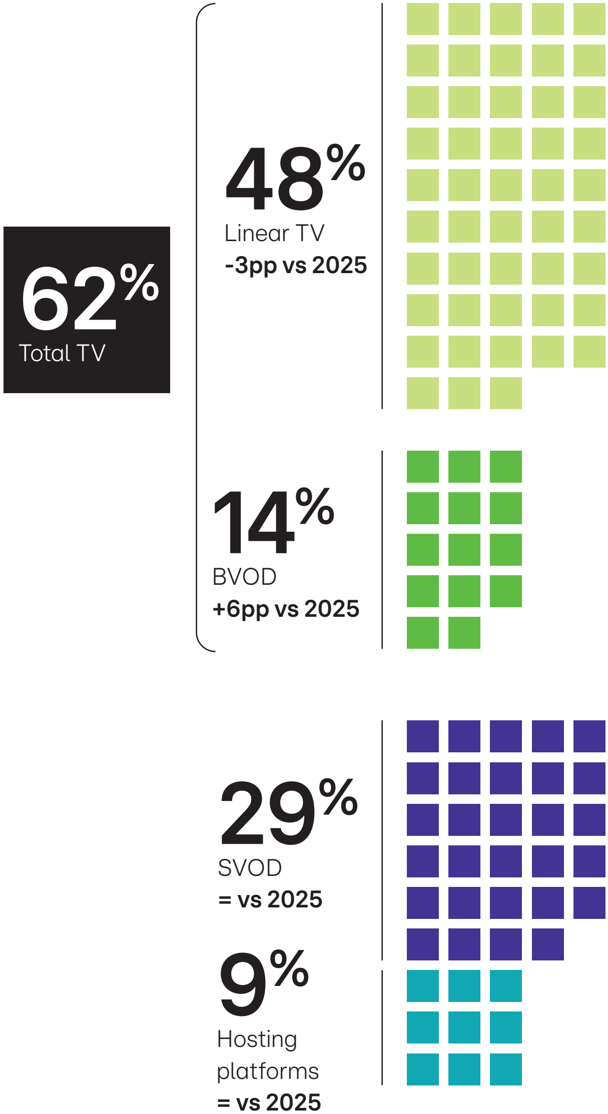
Which platforms do you watch everyday on your TV?



Basis: Europe, own a TV set or a Video projector, N=11,257.

When you turn on your TV, what is your first destination?

TV anchors every day viewing habits across Europe. When people switch on their TV set, broadcast content is what they seek out. A clear majority – 62 per cent – choose broadcast as their first destination, with 48 per cent going straight to linear TV and 14 per cent to broadcaster streaming platforms. Broadcaster streaming has grown by six points since the last edition of this study. Subscription video-on-demand follows at 29 percent, while YouTube accounts for 9 per cent.



Basis: Europe, own a TV set or a Video projector, N=11,257.

Broadcast platforms are the primary destination for TV content

Broadcast platforms remain the natural starting point for viewers across Europe as most audiences turn to Total TV first when their favourite programme appears on several services at the same time.

When viewers have to choose between different platforms on their TV set, broadcast is their natural starting point. In Europe, 69 per cent turn to Total TV first when their favourite television programme is available on several platforms at the same time. Linear TV leads with 44 per cent, followed by BVOD with 25 per cent and YouTube with 12 per cent.

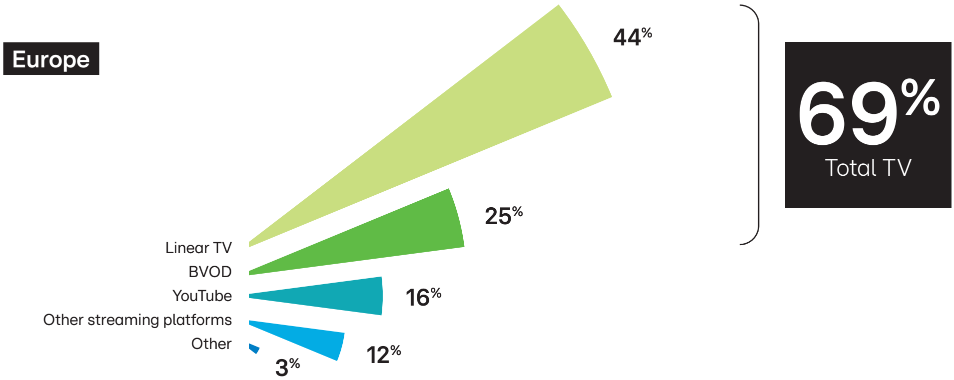
The picture in the US is different. Only 58 per cent choose Total TV first. YouTube attracts 30 per cent, while linear TV and BVOD follow with 34 and 24 per cent.

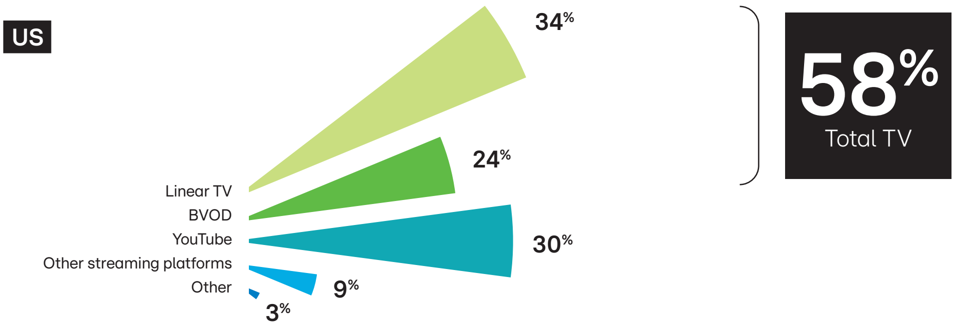
Country focus

54%

of French people would choose to watch their favourite TV programme on linear TV, and 17% on BVOD.

Imagine that one of your favourite TV programmes is available on different platforms at the same time. Which platform would you choose first?





Basis: own a TV set or a Video projector, N=13,393.

Streaming on TV is the norm for Europeans

Streaming on the television set has become a natural part of daily life in Europe as most viewers now stream regularly on the big screen with 80 per cent using SVOD each month.

People across Europe are streaming on their TV sets more than ever. Streaming Video on Demand usage is high, with 80 per cent watching at least once a month and 68 per cent at least once a week. Hosting platforms follow closely at 72 per cent monthly, and 58 per cent weekly.

Broadcaster streaming platforms also play a strong role in daily routines. BVOD usage is widespread, with 61 per cent watching at least once a month, 45 per cent tuning in weekly, and 16 per cent streaming every day. Streaming is embedded into everyday life, no matter the household or age group.

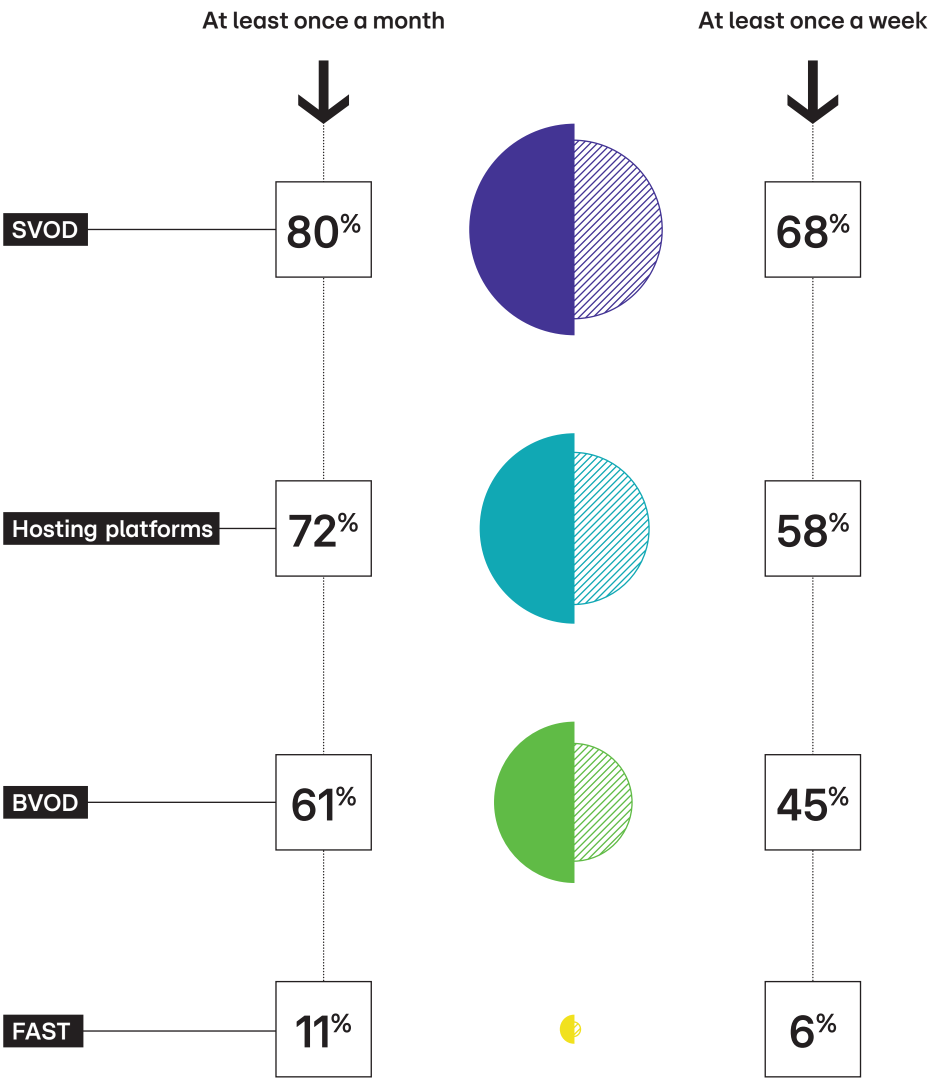
There is a clear shift toward TV-based streaming. Content once expected to be watched on mobile devices is now, for the most part, enjoyed on a television screen, and that trend is growing. The rapid development of CTV apps is further strengthening and enhancing the big-screen streaming experience.

Country focus

72%

of Danish people watch BVOD platforms on their TV at least once a week. That is 5pp more than SVOD.

How often do you watch streaming platforms on your TV?



Basis: Europe, own a TV set or a Video projector, N=11,257.

BVOD is a multi-generational success

BVOD has become a shared habit across generations as weekly viewing now reaches 44 per cent among adults (aged 35-49) showing how broadcaster streaming has firmly entered everyday TV routines.

Broadcaster Video on Demand is no longer seen as something mainly embraced by younger viewers. Weekly viewing reaches 40 per cent among people aged 18 to 24 and rises to 44 per cent among those aged 35 to 49.
It climbs further to 46 per cent for viewers aged 25 to 34 and reaches 52 per cent among those aged 50 to 64. The pattern remains consistent across age groups. BVOD has simply become part of our everyday TV routine.

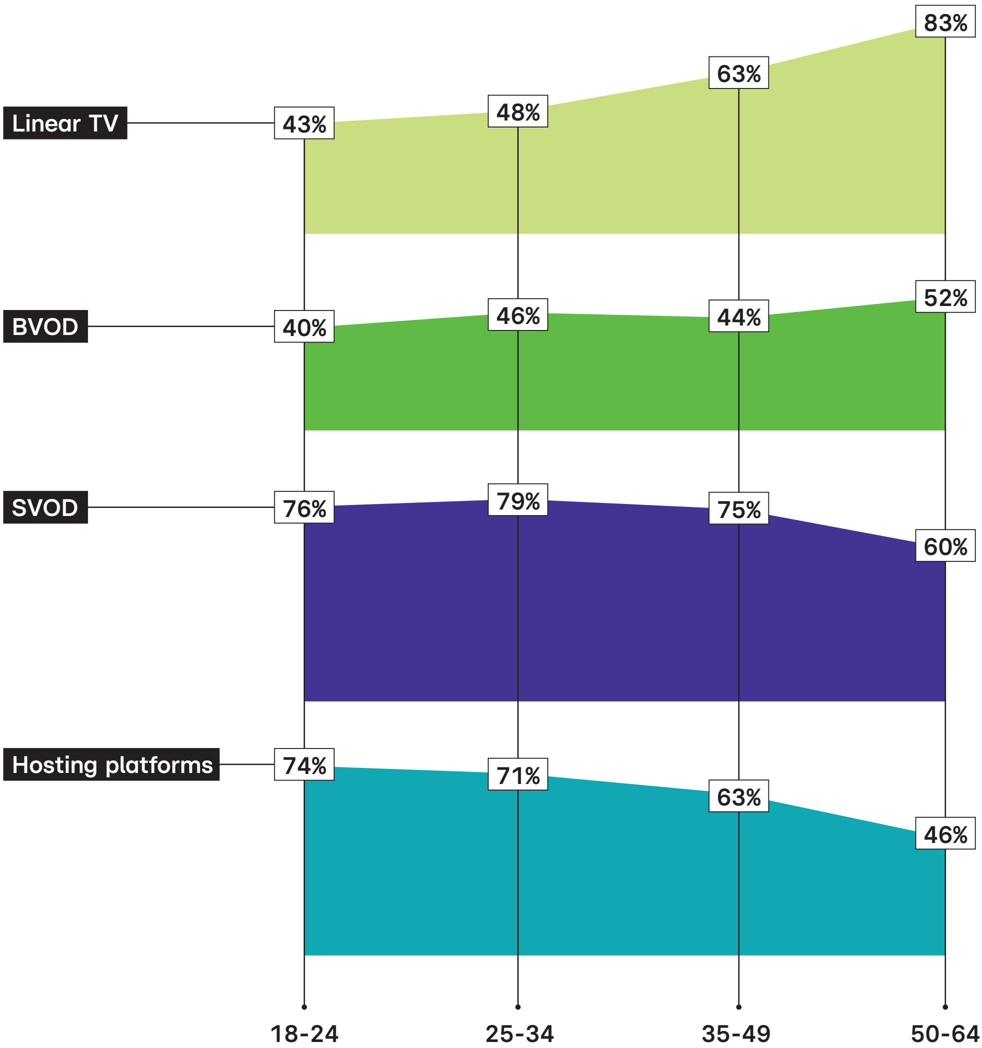
The data suggests similar penetration levels across all age groups for BVOD, and what began as a trend among younger viewers has now been embraced by every generation.
For many years, BVOD platforms were mainly used for catch-up viewing.

Now, viewers know they can replay anything at any time, yet, 41 percent still choose to watch live. It shows that even in a replay world, people want to experience things in real time. They like the feeling of being part of the moment. And they use BVOD as a simple way to watch live TV on their own terms.

41%

of Europeans use BVOD to watch live content on their TV.

Which platforms do you watch at least once a week on your TV?



Basis: Europe, own a TV set or a Video projector, N= 11,257.

Many subscribers does not equal high engagement

Subscriber growth no longer reflects how people watch, as streaming platforms struggle to turn large audiences into regular viewers, and subscriptions become something to have rather than to use.

Streaming subscriptions continue to rise, with Netflix reaching 53 per cent of people, Amazon Prime Video 36 per cent, and Disney+ 29 per cent. Daily viewing, however, tells a different story. Only 19 per cent watch Netflix every day, while Amazon Prime Video reaches 8 per cent, and Disney+ just 7 per cent.

Subscriber growth is no longer matched by engagement, and the viewing curve has flattened. A large subscriber base does not translate into frequent use. For many, a subscription has become something to have rather than something to use, suggesting that SVOD platforms function more as a nice-to-have, not as a daily habit.

Country focus

64%

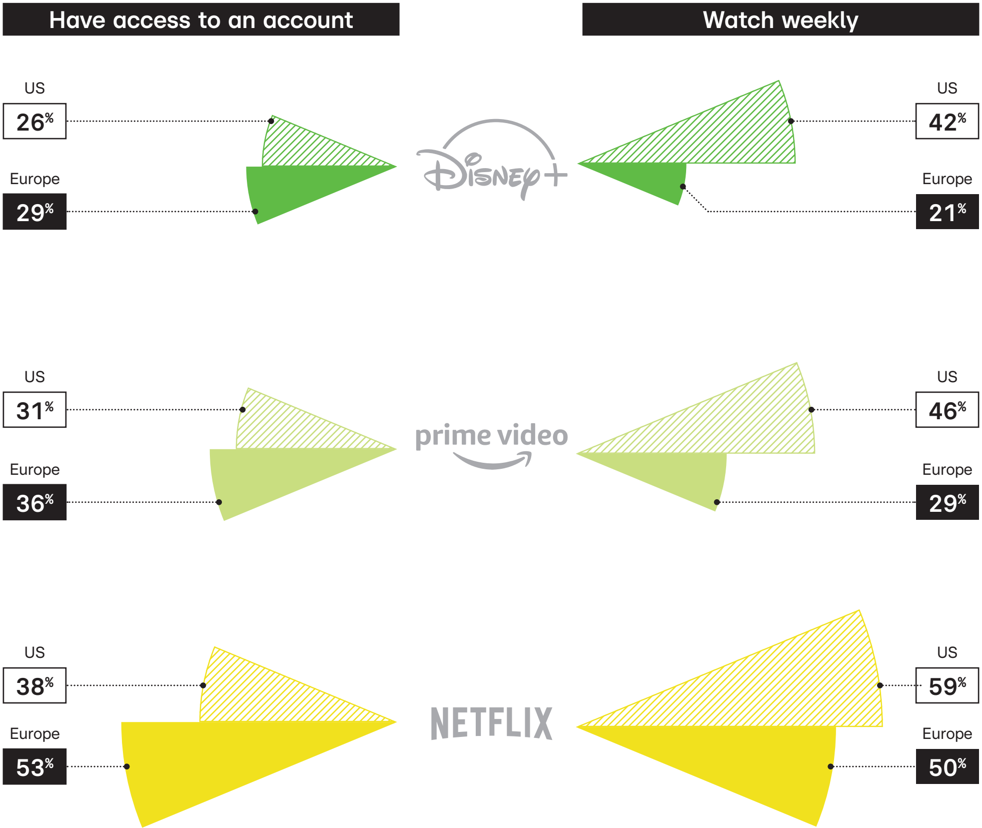
of Norwegian people have access to a Netflix account.

Country focus

43%

of Finnish people have access to a Netflix account.

Which streaming platforms do you have a paid subscription to?



Basis: own a TV set or a Video projector, N=13,393.

Europe's unique local viewing culture in a world of global streamers

Europe's viewing culture blends global streaming choice with local habits as audiences turn to international platforms for on-demand content while keeping live and communal moments on television.

Streaming platforms offer global catalogues, yet viewing habits tell a different story. Eighty-five per cent of Netflix users watch on-demand content, Amazon Prime Video reaches 82 per cent, and Disney+ reaches 83 per cent. Live or replay use is low, with only 11 per cent on Netflix, 13 per cent on Amazon Prime Video, and 10 per cent on Disney+.

YouTube shows a similar pattern. Half of viewers watch creators (51 per cent), music videos reach 46 per cent, and shorts reach 38 per cent.

In the US, the global streamers emerged as alternatives to television, where TV can be expensive. In Europe, television is free, widely available, and deeply embedded in viewing habits.

51%

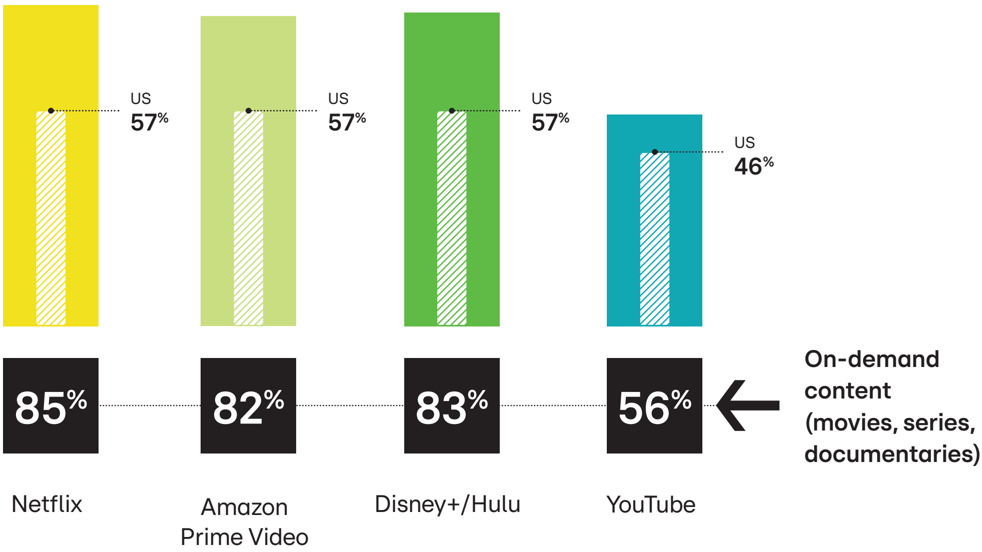
of Europeans watch content creators on YouTube (+17pp vs the US).

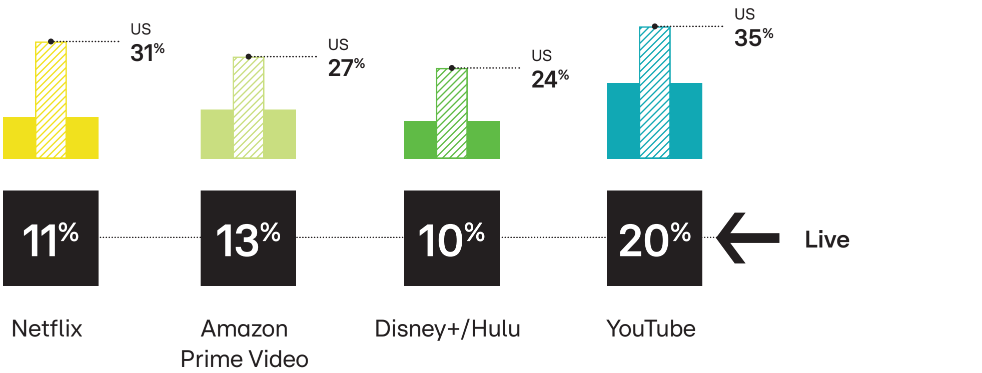
As a result, viewers turn to streamers mainly for on-demand content, while keeping live, local, and communal moments on linear TV.

38%

of Europeans watch shorts on YouTube (+14pp vs the US).

What content genre do you watch on streaming platforms?





Basis: I watch at least several times a year these platforms on my TV, N=13,287.

Broadcast TV is the main destination for local content

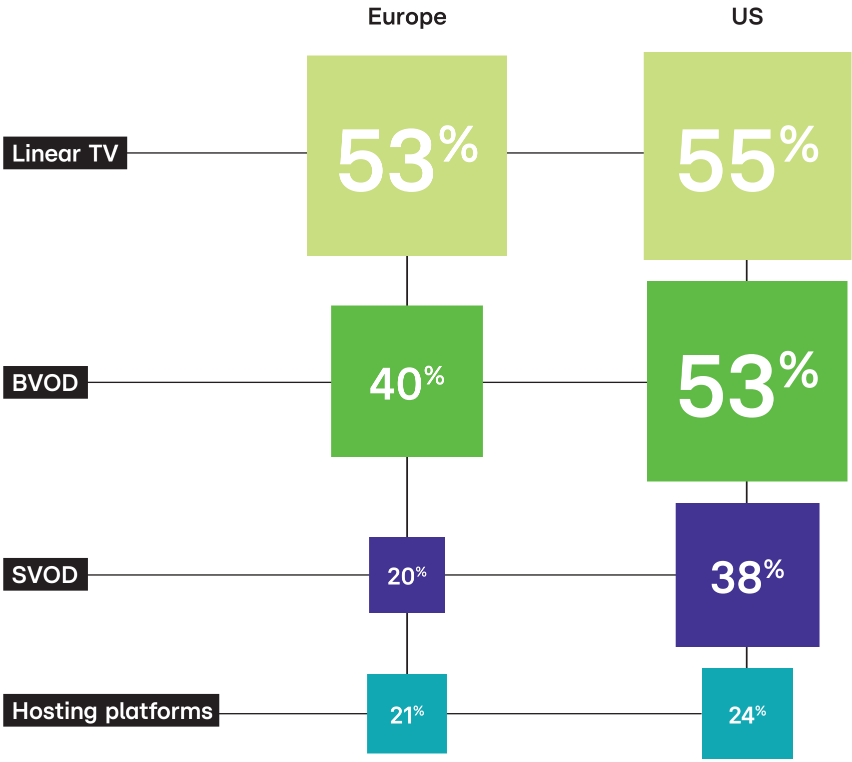
Local content remains central to how Europeans watch television as broadcasters shape national storytelling. Audiences continue to favour programming that reflects their own culture and identity.

Local content plays a central role in broadcasters' strategies, influencing the content people connect with which defines national identities, and feeding both linear TV and BVOD catalogues. Its presence strengthens the breadth of programming and plays a central role in how audiences choose to watch video.

In the US, it is unsurprising that local content is more often consumed on SVOD services. Global streaming platforms such as Netflix, Disney+, and Amazon Prime Video are American by origin and therefore offer a broader and more familiar range of home-grown productions.

Across Europe, the appetite for local video content is strong, though it varies from one region to another. Western European countries show particularly high interest, while Northern markets generally register lower levels of engagement. These differences are likely tied to cultural specificities and the amount of local content available within each market.

I often watch local content on it



Country focus

80%

of Hungarian people agree with the idea that it is important for them to have access to local video content, leading the European comparison.

Country focus

60%

of Swedish people agree it is important for them to have access to local video content, which is the lowest level among the European countries.

Basis: I watch at least several times a year these platforms on my TV, N=13,287.

Ad-supported streaming is surging in Europe

With streaming habits evolving fast, audiences are embracing choice and flexibility, though uptake of paid ad-supported tiers varies greatly from one European country to another.

Ad-supported subscriptions (also known as 'ad-tier') are becoming part of the streaming landscape, yet interest varies widely across Europe. A total of 55 per cent of people subscribe to at least one paid ad-supported tier, whether on BVOD or SVOD.

Growth is clear year on year. While Amazon Prime Video rises in Europe from 26 per cent in 2025 to 68 per cent in 2026, Netflix moves from 22 to 35 per cent, and Disney+ increases from 17 per cent to 40 per cent.

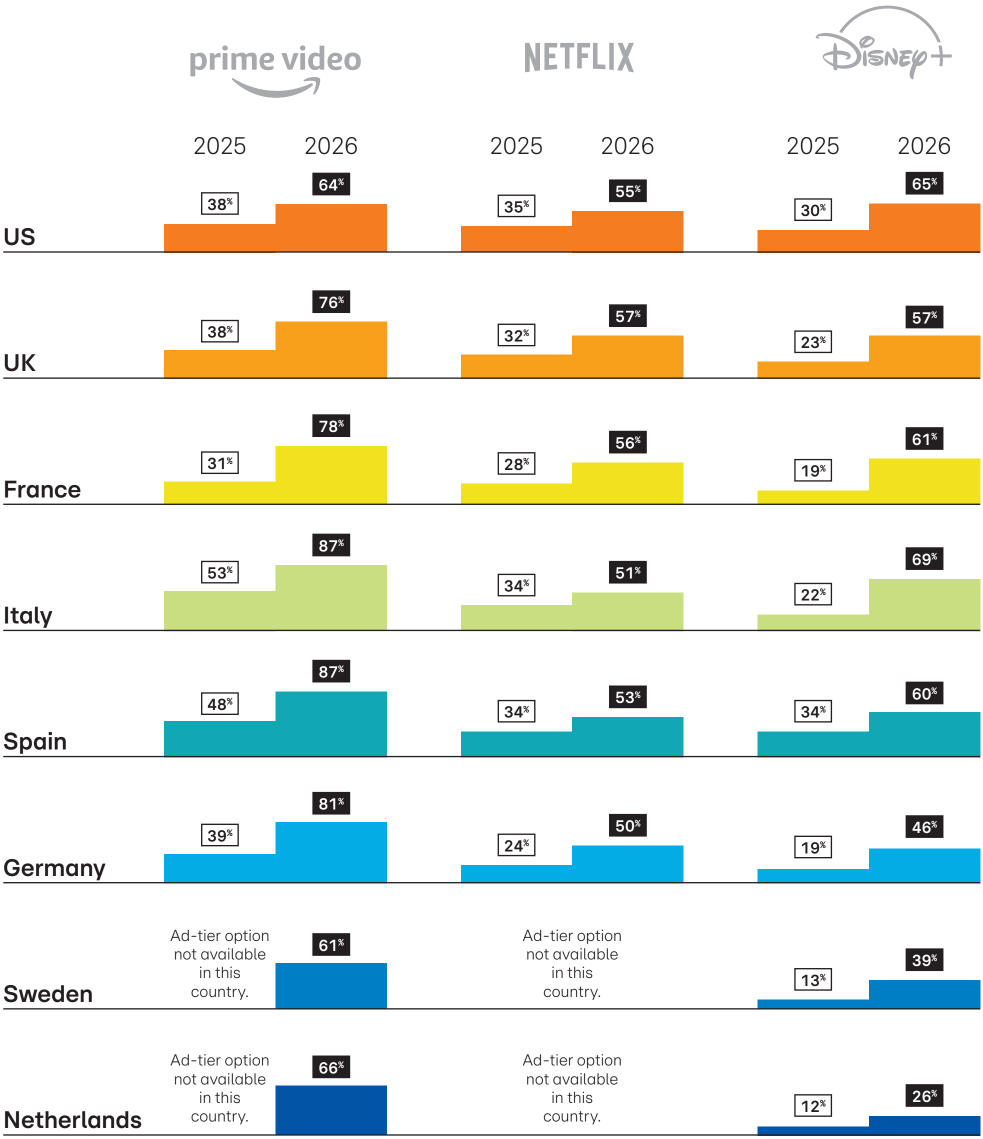
Regional appetite differs in Europe. Southern and Western markets show strong momentum, while Northern Europe shows limited interest, this may be due to the fact that ad-tier options were launched months – or in some cases – a year later.

55%

of Europeans subscribe to at least one paid ad-supported tier of a streaming platform.A)

What kind of paid subscriptions do you have?

Response: an option with ads.



Basis: total sample N=14,802. The 2025 field of the study was carried out in January.

Lack of clarity about the purpose of ads fuels irritation

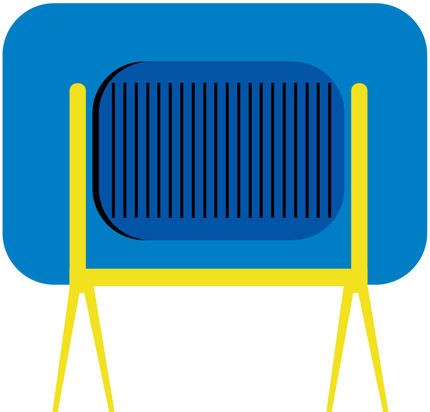
When viewers do not understand the purpose of ads, annoyance grows, showing there is still work to be done in explaining the virtuous circle.

Europeans are unsure why ads appear on Streaming VOD platforms. When the purpose is unclear, patience drops quickly.

This misunderstanding feeds frustration, as 60 per cent of Europeans say ads on SVOD platforms annoy them, which is 14 points higher than BVOD, where the role of advertising is clearer, and easier to accept.

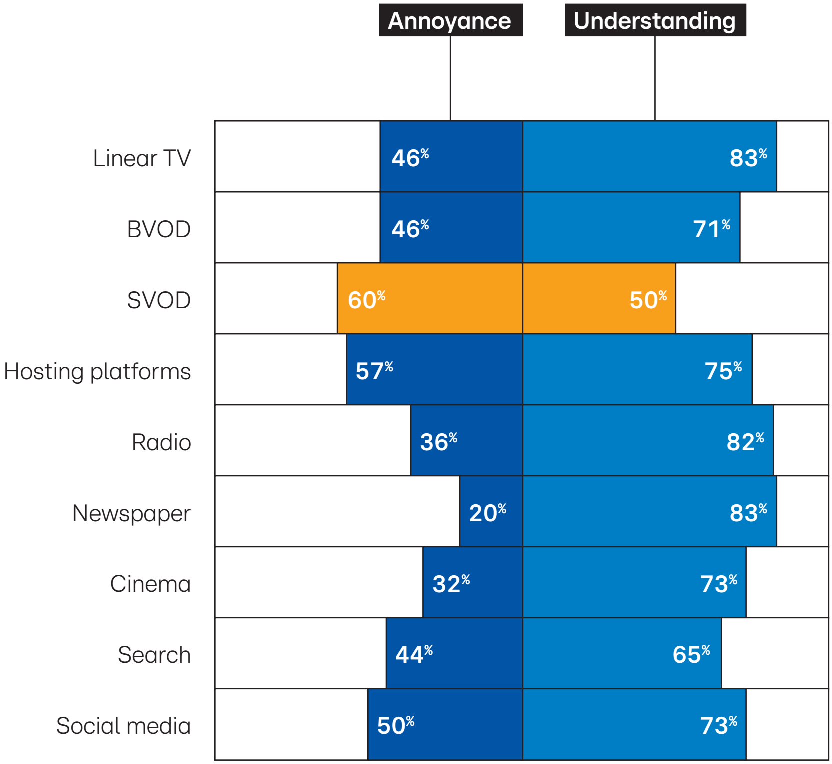
The larger picture matters. Advertising supports the content viewers enjoy. It keeps TV accessible, and it funds the production of high-quality programming.

When people understand this virtuous circle, ad acceptance rises. When they do not, irritation grows.



Because their purpose is unclear, SVOD ads feel annoying

Percentage of people who understand why there are ads (all agree) and percentage of people annoyed by ads (responses 4-5 on a 1-5 scale).



Basis: Europe, total sample N=12,297.

Legacy media leads on trust

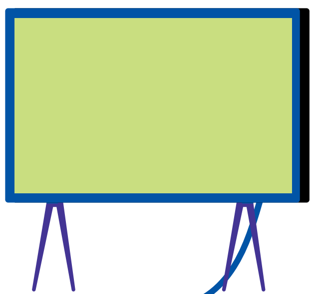
Legacy media holds a strong place in Europe, as linear TV remains a trusted environment for many viewers, with 61 per cent expressing confidence in the brands they encounter there.

Europeans continue to place their trust in established media. Linear TV is the most reassuring environment, trusted by 61 per cent of people. Radio follows closely at 60 per cent, and magazines and newspapers are at 58 per cent. BVOD performs strongly too, with 56 per cent of viewers expressing trust in the brands they see there.

These are environments people know well. They are curated, regulated, and familiar. They carry a sense of editorial responsibility and professional standards that audiences rely on when discovering something new. In a world where information moves quickly, and uncertainty has become part of daily life, these platforms offer clarity and confidence.

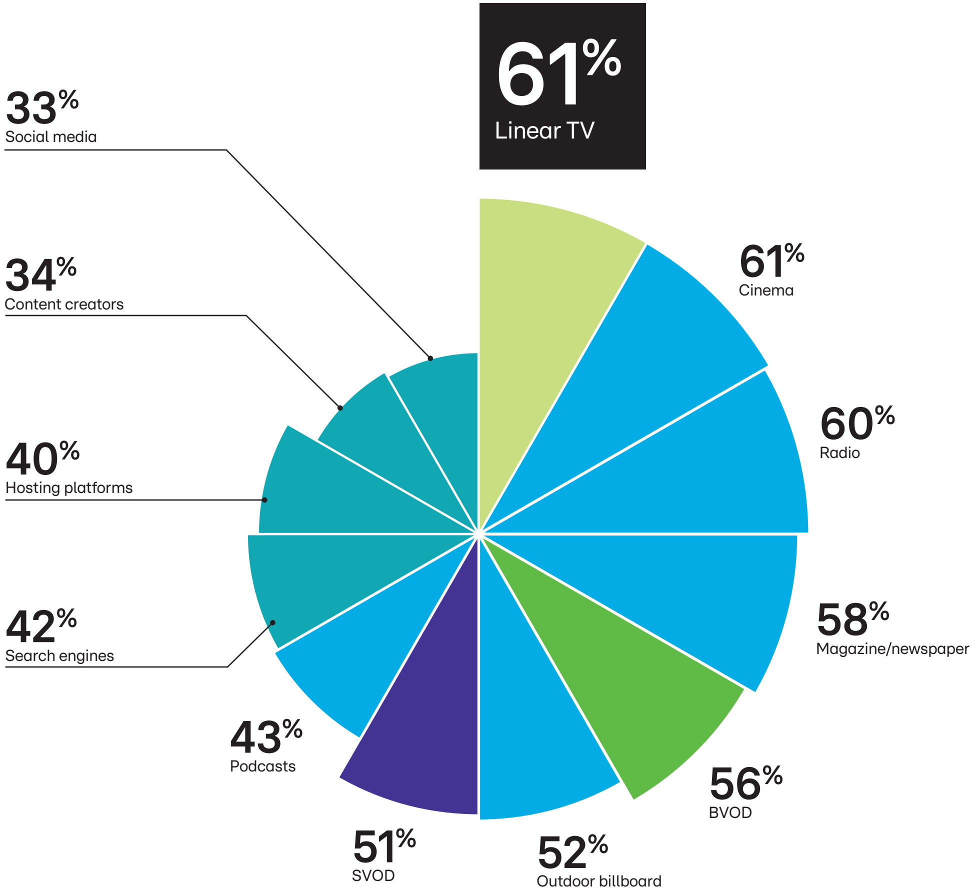
By contrast, trust drops when people move to more open ecosystems. YouTube reaches 40 per cent of respondents, while social media sits at 33 per cent. The open nature of these platforms plays a part. Content is less controlled. Sources vary in quality, and people are more cautious when encountering a brand for the first time.

This gap is important to consider for advertisers. It reminds us that trusted environments shape how audiences evaluate brands. It also shows that legacy media and broadcaster platforms play a central role in helping advertisers build credibility in an increasingly complex landscape.



How much do you trust an unfamiliar brand after seeing or hearing an ad on these different media?

Trust somewhat, or very much.



Basis: Europe, total Sample. N= 12,297.

Glossary

This glossary brings together key terms used throughout the Living Room Study. It includes established industry terminology, and a selection of definitions created specifically for the purposes of this brochure to ensure clarity and consistency for all readers.

AVOD

Advertising Video on Demand is a free video content service that mainly offers on-demand content such as movies and series. In the US, PlutoTV and Tubi have achieved significant success with this model.

BVOD (Broadcaster VOD)

Broadcaster Video on Demand (BVOD) is the term used for streaming services offered by traditional TV broadcasters. Some of these platforms are funded by advertising, making them free for viewers to use (for example: M6+), others also offer optional subscription tiers that add premium features (for example: RTL+).

Connected TV (CTV)

Video content consumed on a TV screen, delivered via an internet connection. This includes TVs directly connected to the internet (smart TVs), as well as hardware that enables a TV to become connected, such as TV sticks, games consoles, and set-top boxes that are connected to the internet (IAB definition).

FAST (Free Ad-Supported Streaming TV)

FAST channels are ad-supported streaming services that resemble the traditional linear TV experience, providing thousands of linear channels often dedicated to single programmes (series, TV shows), or specific genres (horror, action, fantasy). Many of these services have been created by smart TV manufacturers or CTV OS providers, such as Samsung TV+, LG Channels, and Google TV (in the US).

Hosting platforms

Video streaming platforms that provide content (live, or on-demand) created by their users (creators or media). YouTube and Twitch are the most famous platforms in this category.

SVOD (Subscription VOD)

A video content service for which users pay a subscription. Most services offer a choice between lower-tier pricing packages including ads, or an ad-free premium subscription (for example: Netflix, Disney+, Amazon Prime Video, etc.).

Total Video

All video consumption on a screen, covering every format and platform including broadcast, AVOD, FAST channels, social video, short form, and other digital video environments.

Total TV

The sum of linear television and BVOD streaming encompassing all broadcast content viewed live, time-shifted, or on broadcaster-owned streaming platforms.

About RTL AdAlliance

RTL AdAlliance is the sales house that brings all premium content publishers in Europe together under one roof for international brands.

Created from the most successful broadcasting, publishing and Adtech companies in Europe, RTL AdAlliance offers brands access to the audience of 100 TV channels, 900 print publications and 5,000 premium web properties – with over 160 million daily TV viewers and more than 4 billion online ad impressions a month in one streamlined service – offering unrivalled reach in Europe and beyond.

RTL AdAlliance makes a difference through the support of 250 media sales experts all over the world. It provides not only this dedicated support but also access to the latest insights and innovations in the media world. Offering market leading Adtech solutions for buying, selling, and customising ad space to help brands make the most of each platform at every stage of the customer journey.

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Authors

Stéphane Coruble
CEO, RTL AdAlliance

Aurélie Brunet de Courssou
Senior Marketing Director, RTL AdAlliance

Jean-Baptiste Moggio
Senior Brand Director, RTL AdAlliance

Côme Fradetal
Head of Strategic Insights, RTL AdAlliance

Joline Langfritz
Head of Editorial, RTL AdAlliance

Raphaël Courtois
Insight Manager, RTL AdAlliance

Marion Ranchet
Founder, Streaming Made Easy

Contributors

Dr. Oliver Vesper
Deputy CEO/CDO, RTL AdAlliance

Daniel Bischoff
Chief Operations Officer, RTL AdAlliance

Carine Jean-Jean
VP Communications & Branding,
RTL AdAlliance

Emilie Demarquay
Graphic Designer

Helen Jones
Editor

Joseph&Sebastian
Illustrations

Eleonora De Amicis
(and the Norstat Team)
Senior Project Manager, Norstat France

Contact

RTL AdAlliance
rtladalliance_info@rtl.com

Want to explore the Living Room findings in more detail?

Reach out for more insights.

rtl-adalliance.com