

Rakuten TV Enterprise

# Unlocking New Audiences:

FAST/AVOD's Incremental Reach  
Beyond Linear and SVOD



# Scope of Research

Rakuten TV conducted a survey of over **800 consumers** across **Germany, France, Spain** and **Italy** in June 2025 to **understand attitudes and viewing behaviour** across the TV and Streaming landscape.



# The TV and Streaming Landscape

**SVOD:** Subscription-based video-on-demand service, charging a monthly fee for ad-free video content

**NETFLIX**

**prime video**

**AVOD:** Advertising-based video-on-demand service, offering free video content with ads

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**dplay**

**Linear TV:** Traditional form of television viewing where viewers watch scheduled TV programs at the time they are broadcast on a specific channel

**1**

**Rai Italia**

**TF1**

**ARD**

**FAST:** Free ad-supported TV digital channels delivered on CTVs with scheduled programming

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**pluto tv**

"These findings underscore the **unique incrementality that AVOD/FAST bring to the media mix**. No longer an emerging media, it now **unlocks access to audiences** that are increasingly **unreachable** through **traditional or subscription-only** channels.

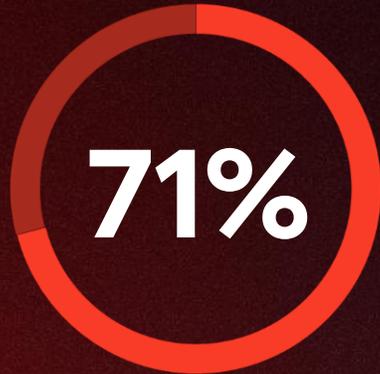
**For advertisers**, the value is clear: AVOD/FAST doesn't just replicate reach – it adds it.

With **consumers clear preference for 'free' content**, even with ads, these platforms offer a powerful and cost-effective way to **extend audience reach**, drive incremental impressions, and **reinforce brand presence** across a diverse viewing behaviours.”

*Edouard Lauwick, VP Media, Rakuten TV*



# Key Learnings



Watch AVOD/FAST services at least weekly

FAST/AVOD is now mainstream habit for a majority of the surveyed population.

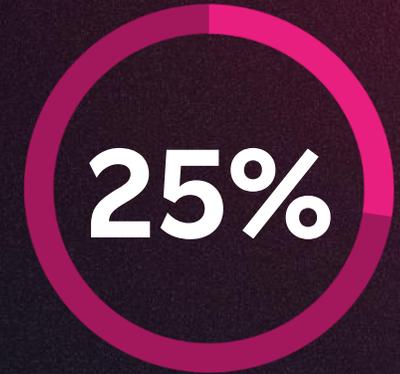
For advertisers, this translates into **reliable reach and frequency opportunities.**



Of people who watch AVOD/FAST don't watch Linear TV

FAST/AVOD is effectively reaching "cord-cutters" or "cord-nevers".

For advertisers, this represents an **opportunity to reach audiences** that are increasingly elusive **through traditional linear channels.**



Of people who watch AVOD/FAST don't watch SVOD

A segment of the audience that is either unwilling or unable to pay for subscription streaming services.

**FAST/AVOD offers an efficient and incremental reach** that SVOD cannot provide.

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# Attitudes to FAST / AVOD

Discover streaming freedom

**Rakuten TV**



# Growing Opportunity



**of people have either maintained or increased their usage of FAST/AVOD**

- This is a channel with strong user retention and growth. It's not just about initial adoption, but sustained engagement.
- Consistent usage means sustained opportunities for advertisers to build brand awareness and drive conversions over time. This makes FAST/AVOD a reliable for long-term brand building, not just short-term campaigns.



# Quality Content



**of people are happy with the quality of movies and series available on AVOD/FAST**

- This is a positive sign for content acquisition strategies, the satisfaction with quality suggests that content strategy is resonating with viewers.
- High content quality means a more engaged audience. Ads placed within high-quality content are likely to be viewed more favourably and attentively, improving ad recall and effectiveness.



# The Ad-Tolerant Audience



**76%** of people are either very happy, happy or neutral with the volume of ads on **AVOD/FAST**

- This challenges the assumption that ads are universally reviled. The high tolerance for advertising suggests a clear value exchange: consumers are willing to accept ads in exchange for free access to content.
- This means that ad impressions are likely to be more effective and less intrusive. This gives advertisers confidence in their investment, knowing their message is being received by a receptive audience.



# The Rise of Free

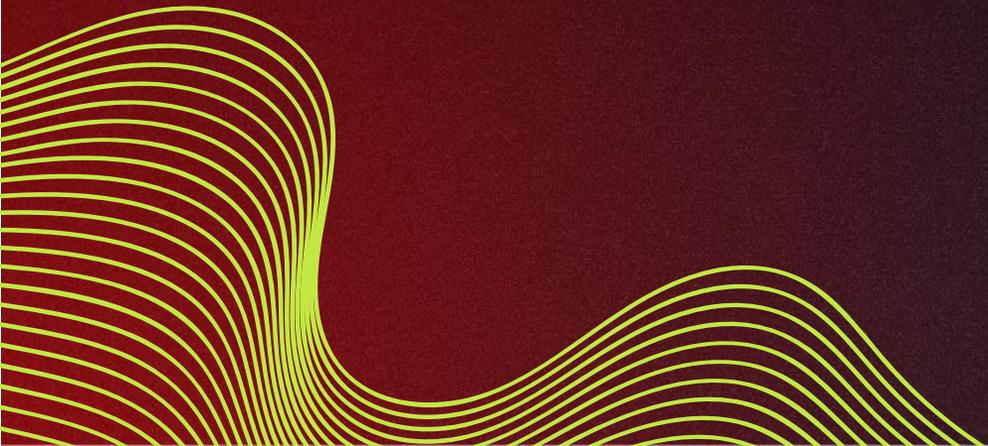
**“It’s Free” is the primary appeal of AVOD/FAST, with content selection the second most important reason**

- This confirms the core value proposition. This reinforces the idea that accessibility and cost-effectiveness are paramount for a significant portion of the viewing public.
- Brands that align with value, accessibility, or mass-market appeal will find FAST/AVOD audiences particularly receptive.

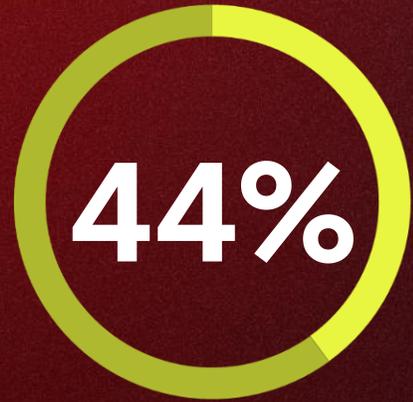


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# Incrementality vs Linear TV



# Reaching Cord-Cutters



**of FAST/AVOD viewers  
do not watch Linear TV**

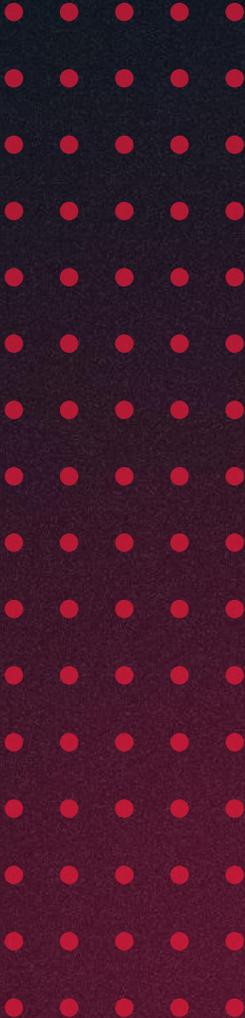
- A significant segment of the population is increasingly unreachable through traditional broadcast television.
- For campaigns aiming for maximum reach and frequency It's essential to capture these audiences of "cord-cutters" and "cord-nevers" that don't embrace linear TV. This suggests a strategic shift in how "total video reach" is calculated and purchased.

# The decline of Linear TV

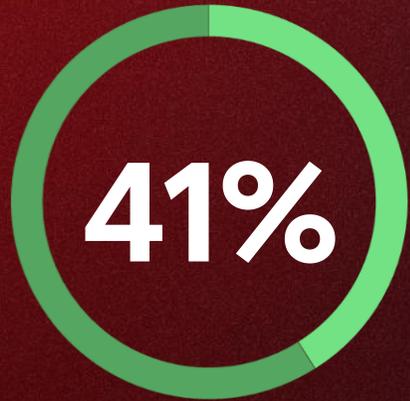


**of all people have decreased their usage of Linear TV**

- This indicates an ongoing shift away from traditional linear consumption towards digital platforms
- To maintain reach and impact, advertisers must actively shift budgets to digital video platforms where audiences are migrating, with FAST/AVOD being a prime candidate due to its free nature and ad-supported model.



# Delivering fresh content

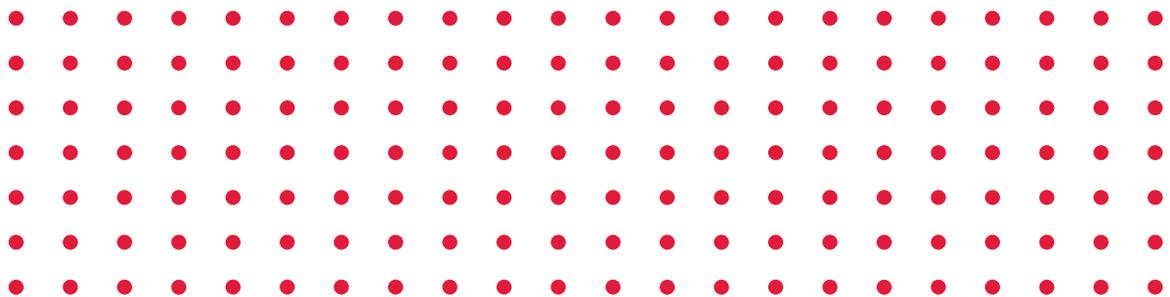
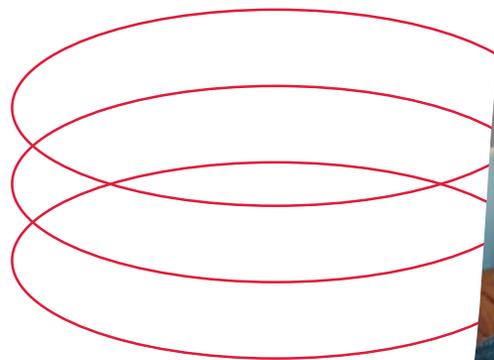


**of people who watch FAST/AVOD often, watch movies or series that they would not otherwise have watched on Linear TV**

- This is the definition of "incrementality." FAST/AVOD is not just stealing eyeballs from linear TV; it's expanding the total amount of content consumed.
- FAST/AVOD delivers new, unique impressions and is not just a cheaper alternative to linear. This makes it a highly efficient use of ad budget for incremental audience acquisition.

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# Incrementality vs SVOD

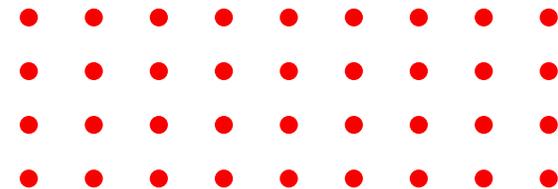


# Untapped Audience



**of AVOD/FAST viewers  
do not watch SVOD**

- This confirms FAST/AVOD's role in serving a segment of the market that is subscription-averse. This could include younger demographics, budget-conscious consumers, or those simply overwhelmed by the number of SVOD options
- FAST/AVOD provides a direct pathway to consumers who prioritise free content, offering a unique incremental reach beyond paid streaming services.

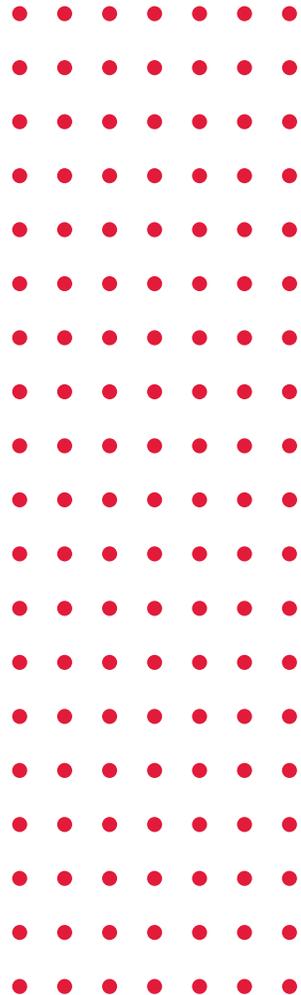


# Beyond Subscription

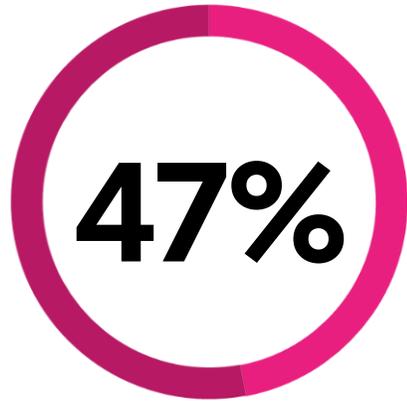


**of all people believe it's important that their movies or series are free (even if they include ads)**

- This reflects modern consumer priorities. The perceived value of "free" content, even with ads, significantly outweighs the desire for an ad-free experience for a large majority.
- Brands can confidently invest in FAST/AVOD knowing that the audience understands and accepts the ad model as a fair exchange for free entertainment.

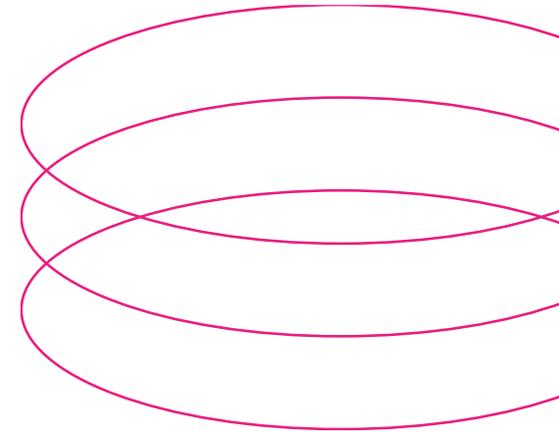


# True Incrementality



**of people who watch FAST/AVOD often, watch movies or series that they would not otherwise have watched on SVOD**

- This demonstrates strong content incrementality against SVOD and suggests that FAST/AVOD is catering to viewing preferences not met by SVOD.
- This could be due to genre specialisation, curated channels, or simply the serendipitous discovery that comes with browsing free content.

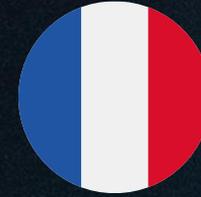


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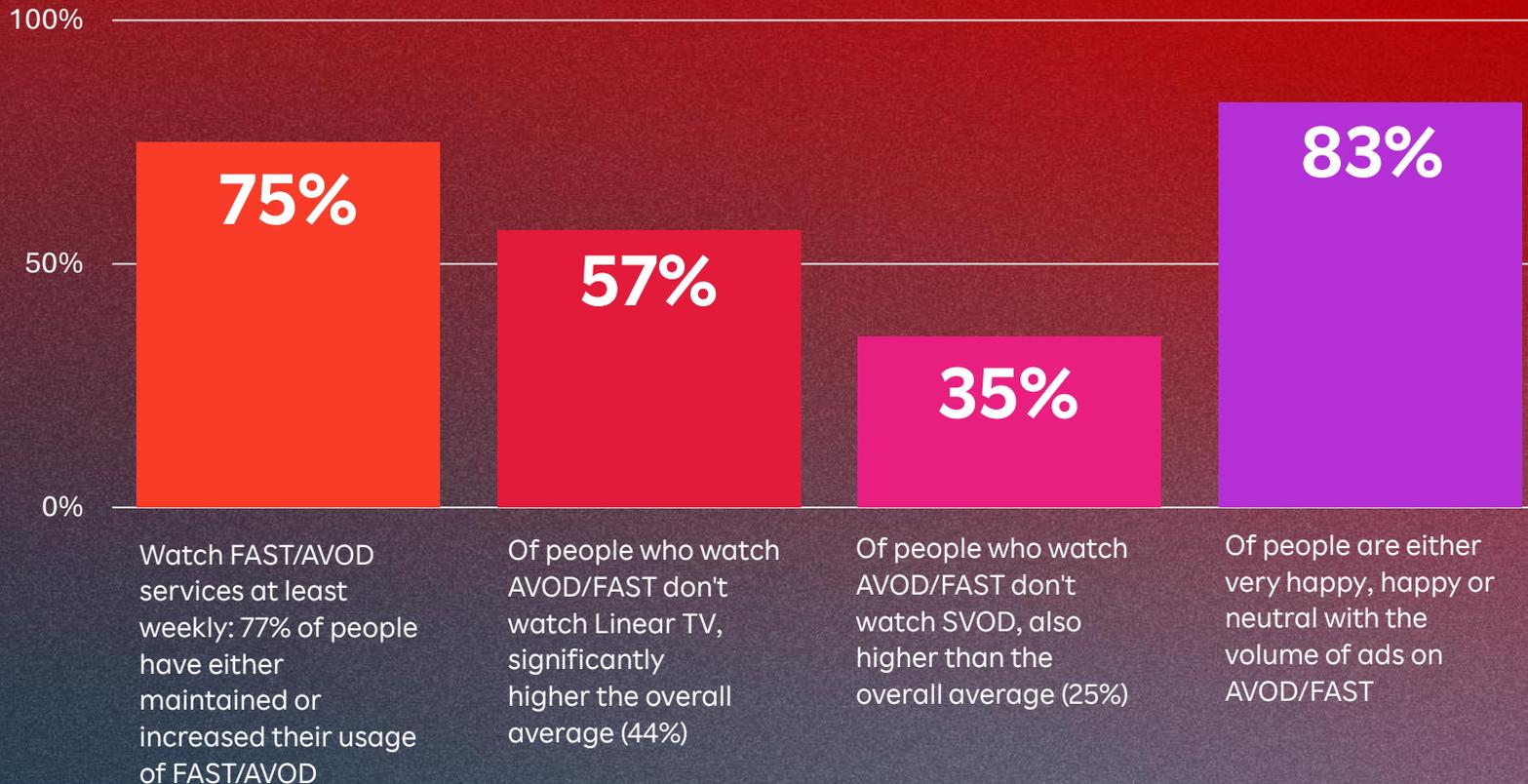
# Market Insights



# FRANCE



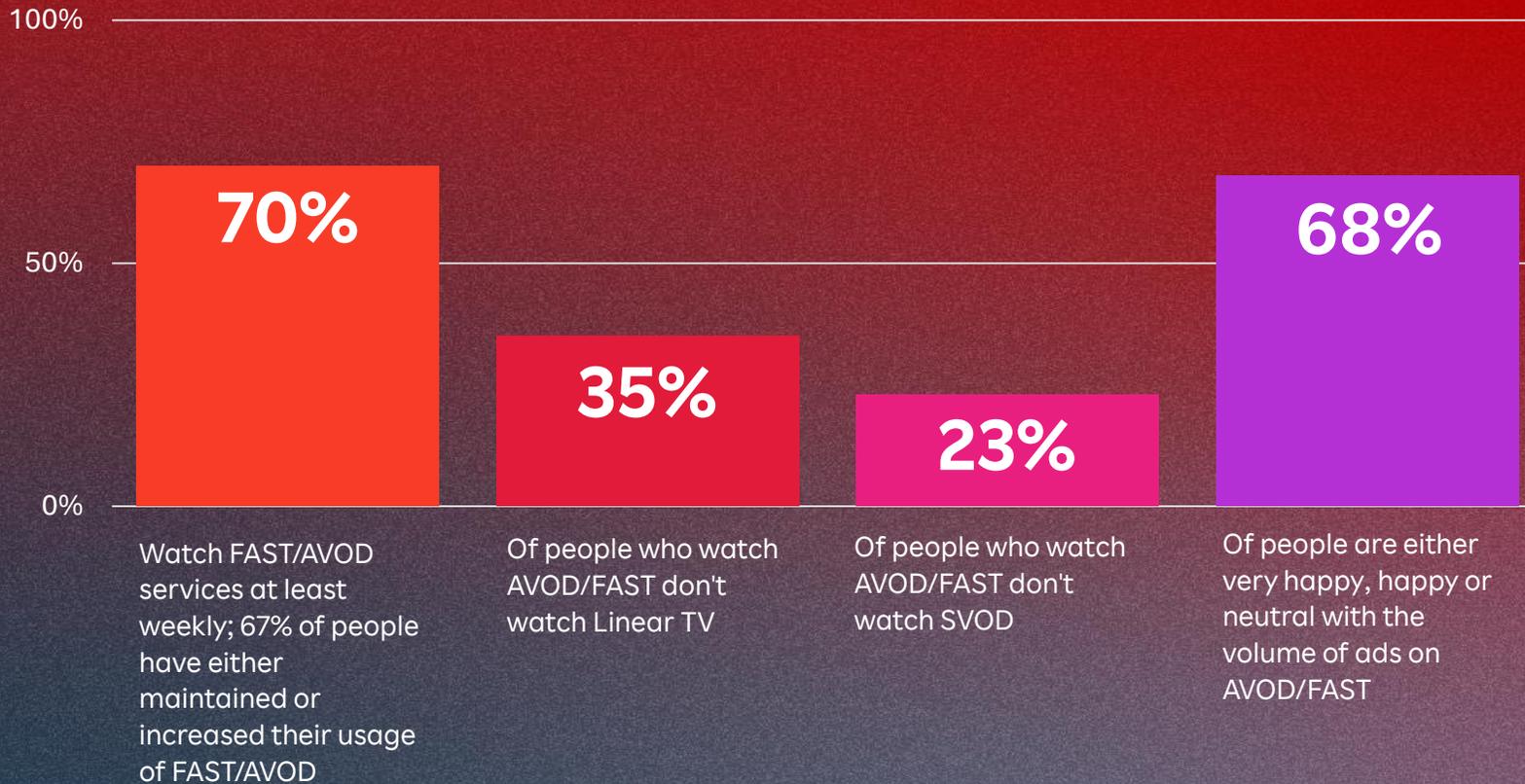
## VIEWER INSIGHTS



# ITALY



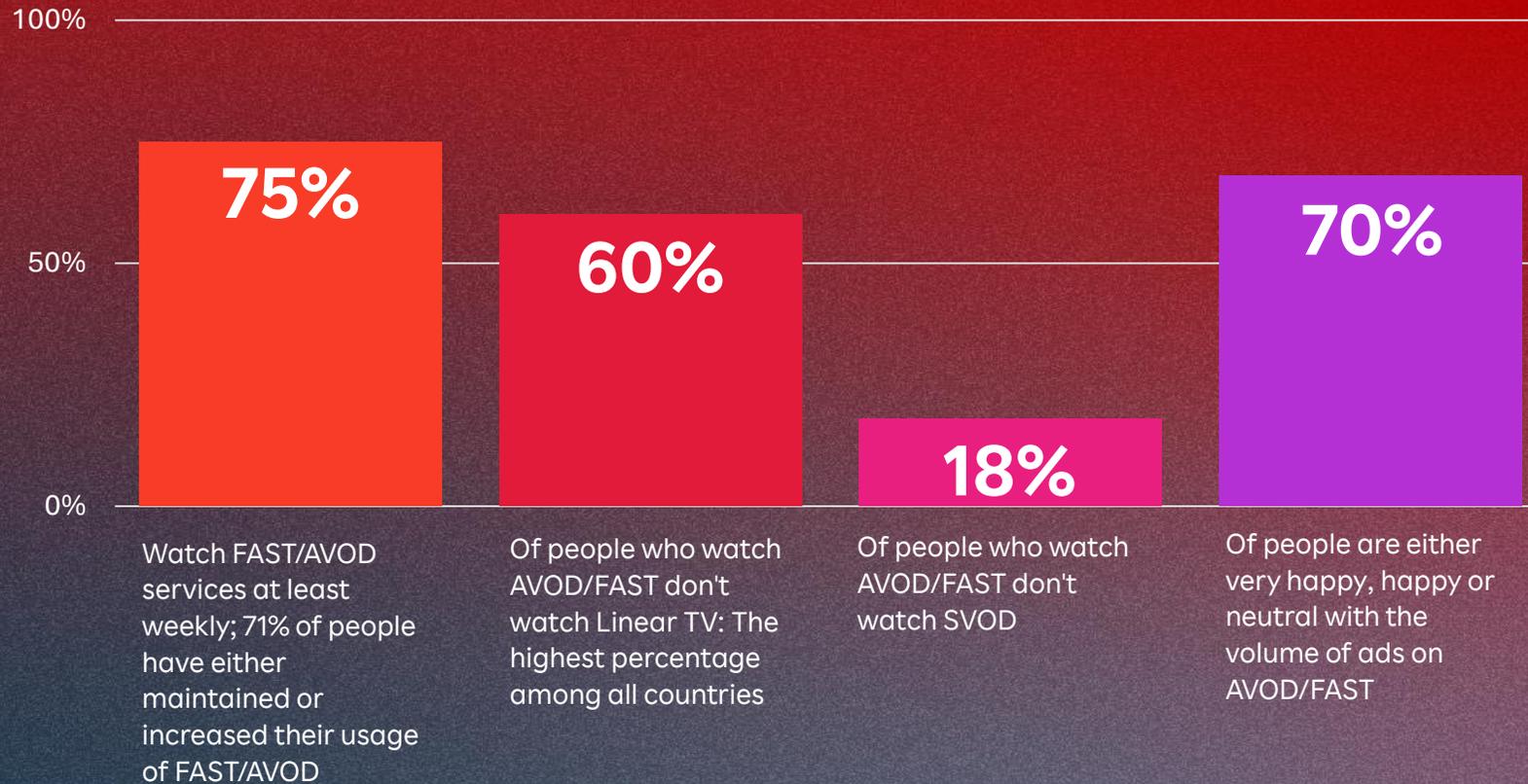
## VIEWER INSIGHTS



# SPAIN

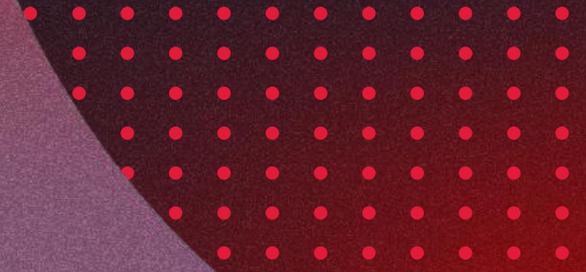
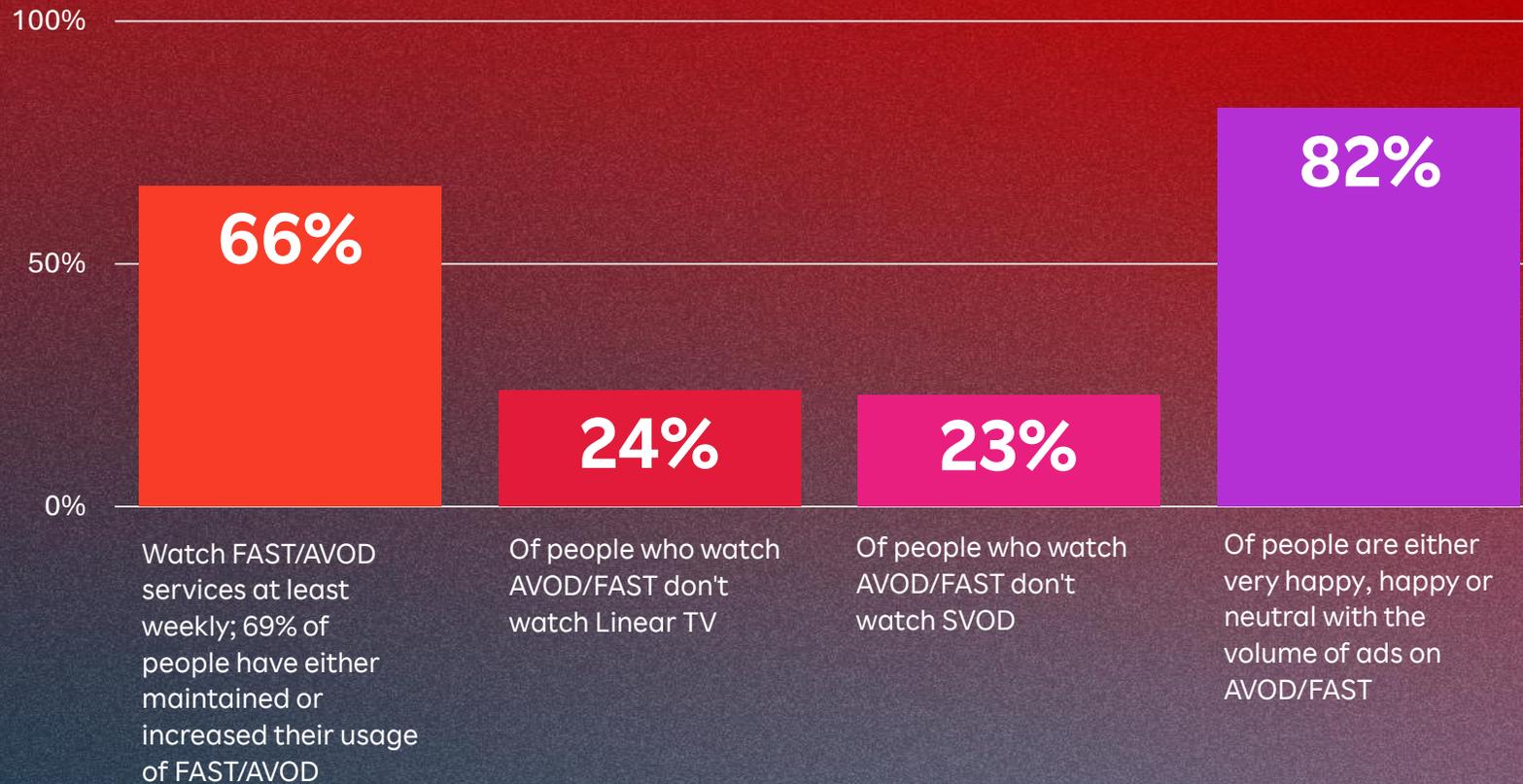


## VIEWER INSIGHTS



# GERMANY

## VIEWER INSIGHTS



# Rakuten TV Enterprise

Your key to unlocking the unique audiences of FAST/AVOD

Contact us at:

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