
Miscellaneous

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The rise of AVOD in Spain: The impact of advertising on the streaming user experience

Abstract

This study examines the impact of introducing advertising into AVOD (advertising video-on-demand) streaming services on user experience in Spain. Its primary objective is to determine how users perceive in-stream advertising and which factors influence their decision to subscribe to ad-supported plans. The research adopts a qualitative approach, drawing on ad hoc data from GECA's OTT Barometer, which surveyed a representative sample of 2,000 individuals. Findings indicate that most users regard advertising as a reasonable trade-off for accessing content at a lower price; nevertheless, younger viewers exhibit markedly greater aversion to such intrusions than other demographic groups. Preferences for ad-supported tiers differ by platform, with Prime Video receiving the highest acceptance and Netflix the lowest. While the AVOD model has been positively received overall, its long-term success will hinge on each platform's ability to manage user experience by minimising ad intrusiveness. Strategically, leveraging Big Data emerges as crucial for optimising advertising personalisation and enhancing customer retention.

Keywords

AVOD; SVOD; advertising; user experience; ad-supported plans; streaming; addressable advertising.

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1. Introduction

The advent of streaming platforms irreversibly reshaped the audiovisual landscape by granting users personalised, unlimited access to on-catalogue content that was initially free of advertising. Striking a sustainable balance between growth, profitability and user experience has, however, prompted a new turning point: the strategic reintroduction of advertising into these business models. The Spanish market—still in the early stages of this transition—now constitutes a key arena for understanding the future trajectory of digital consumption.

1.1. *From SVOD to AVOD: Business-model evolution*

The first two companies to launch direct-to-consumer streaming services—Netflix and Prime Video—embraced the subscription video-on-demand (SVOD) model because they regarded it as the optimal path to mass audiences (Carroni & Paolini, 2020). Their decision was conditioned in part by users' longstanding aversion to advertising in digital distribution environments (Frade et al., 2021; Furini, 2023). By the late 2000s, advertising within paid digital ecosystems was virtually non-existent.

Advertising-based video-on-demand (AVOD) developed in parallel with SVOD, although it captured only a marginal share of the direct-to-consumer market. Until very recently, the United States remained the epicentre of this model, with Hulu¹—launched in 2010—serving as its paradigmatic example (Logan, 2011). Nearly a decade passed before additional AVOD services such as Quibi, HBO Max, Peacock and Paramount+ entered the market amid the so-called Streaming Wars (Neira, 2020). In Europe, the rollout of AVOD tiers occurred later and was largely driven by macro-economic pressures.

In April 2022, Netflix reported the second subscriber loss in its history (exceeding 200,000 accounts), a clear indication of the post-pandemic economic downturn. The announcement precipitated a 25% decline in the company's share price and triggered a steep negative reaction in financial markets. Wall Street consequently revised its valuation criteria for streaming firms, prioritising profitability over raw subscriber growth. Most companies—whose financial statements revealed a pronounced lack of profitability—responded by adopting ad-supported tiers to stem churn and create additional revenue streams. This strategic shift was consolidated through the launch of lower-priced, ad-supported versions designed to halt cancellations in an adverse economic climate (Neira, 2022). Platforms rapidly modified their business models in line with new market dynamics, adjusting fees to stabilise their user bases (Budzinski et al., 2021; Chalaby, 2023; Park & Kwon, 2023; Perraud & Rodríguez, 2024). As a result, SVOD and AVOD have merged across virtually every provider, giving rise to a new digital television-audience market—or streaming marketplace—in which users themselves are commodified (Napoli, 2016). This phenomenon is particularly visible in Spain, which—though late to adopt AVOD—has done so at remarkable speed. Ad-supported plans have been introduced in under two years, during which global operators have progressively localised their offerings to match national advertising infrastructures (Chalaby, 2023; Franks et al., 2024).

1.2. *Strategies of the leading platforms*

Netflix, SkyShowtime and Disney+ have pursued broadly similar AVOD strategies, albeit with notable differences in execution. Netflix and SkyShowtime launched lower-priced tiers that include advertising, whereas Disney+ re-labelled its existing price point as an ad-supported plan and raised the fee for the ad-free version (automatically applied to existing customers). Prime Video, by contrast, made its ad-supported tier the default for all subscribers and introduced a premium surcharge to eliminate ads. The price range varies from €4.99 to €8.99 per month. In a short period, AVOD has proved effective in mitigating the recession's impact and enhancing customer retention. Moreover, the decline in average revenue per user (ARPU) attributable to discounted fees has been offset by advertising income, as evidenced in the financial reports of platforms that have adopted this model.

¹ Hulu is a direct-to-consumer service launched in 2007 as a joint venture among News Corporation (the precursor to 21st Century Fox), NBC Universal (later Comcast) and The Walt Disney Company. It initially operated as an on-demand platform for the television content of its parent companies. In 2010 it expanded into a dual model offering both AVOD (ad-supported subscription) and SVOD (ad-free subscription) tiers.

For many households, AVOD services constitute an attractive proposition because they grant access to content at a lower price in exchange for tolerating advertising interruptions (McKenzie et al., 2024). Understanding how advertising affects user experience—particularly in an environment previously free of commercials—will therefore be decisive in consolidating a successful strategy. Crucial variables include setting an appropriate ad load to minimise intrusiveness and establishing optimal price points for ad-supported tiers (Shon et al., 2021; Zhou et al., 2023; Franks et al., 2024).

1.3. *Big Data and Targeted Advertising in AVOD*

AVOD services also seek to capitalise on the Big Data generated by users' connected consumption in order to strengthen the value relationship among the content provider (the platform), its users and advertisers (Murschetz & Schlütz, 2018). The ultimate objective echoes Napoli's (2010) notion of the addressable audience: highly granular, data-driven targeting. In large-scale streaming businesses—whose catalogues exhibit exceptionally high engagement levels—targeted advertising constitutes a compelling alternative to conventional media buys. As Bela Bajaria, Netflix's Chief Content Officer, observed at the 2024 upfronts:²

“Our audiences are highly engaged—and by engaged I mean they choose to spend their time watching Netflix. That is critical, because engagement is the key to success in streaming. When viewers watch our series and films, they derive greater value from Netflix, remain subscribed for longer, and are more likely to recommend us to friends. This is equally important for all of you, because you want to be wherever the audience is” (Netflix, 2024).

Ultimately, such dynamics facilitate not only more effective advertising but also superior campaign planning.

1.4. *Rationale and Structure of the Study*

Recognising the salience of this topic, the present article investigates the impact of AVOD plan implementation in Spain. Section 2 outlines the study's objectives, methodology and theoretical framework; Section 3 presents the empirical results. These findings underpin the subsequent discussion and conclusions, which are followed by suggested avenues for future research (Section 4).

2. Objectives, Methodology and Theoretical Framework

The principal aim of this article is to ascertain how the incorporation of advertising into streaming services has shaped customer perceptions in Spain. The country offers a particularly instructive case: all major platforms introduced ad-supported tiers within the same national market, after several years of SVOD dominance and over a comparatively short time span. Insights derived from this context are therefore germane to other territories that have experienced—or will shortly experience—similar roll-outs.

2.1. *Objectives and Research Questions*

The general aim is articulated into four specific objectives:

- (O1) Determine audience perceptions of advertising on streaming platforms.
- (O2) Identify the motives that lead users to subscribe to ad-supported plans.
- (O3) Establish whether user perceptions of advertising differ across platforms.
- (O4) Establish whether user perceptions of advertising differ according to content type.

² Upfronts are annual presentations to advertisers held by television networks and streaming platforms in the United States.

The study employs a qualitative design based on data collected *ad hoc* in collaboration with GECA, a Spain-based consultancy specialising in audience and audiovisual-content analytics. This partnership allowed the insertion of seven items aligned with the above objectives into the 21st wave of the OTT Barometer (24 July 2024), giving rise to the research questions.

2.2. Research Questions

- (Q1)** What proportion of users choose subscription plans with or without advertising, taking gender, age and geographic context (habitat) into account, and what motives underlie those choices? [O2]
- (Q2)** Among users who adopt an ad-supported plan, were they previously subscribers to an ad-free tier on the same platform, or are they new customers entering via this modality? [O2]
- (Q3)** How does the presence of advertising affect the viewing experience? Do users perceive it as intrusive or irritating—owing to ad load or product placement—or do they regard its impact as minimal? [O1, O2, O4]
- (Q4)** How do users evaluate the volume of advertisements in the various ad-supported plans? How much time do they devote to watching these ads relative to other media, such as linear television, video-sharing platforms (e.g., YouTube) or social networks (e.g., Instagram, TikTok)? [O1, O3]
- (Q5)** How do users perceive the effect of advertising on their level of attention, depending on whether they consume content via SVOD platforms, social networks or video-sharing sites? [O1, O3]
- (Q6)** Does perceived advertising intrusion vary with content type—films, series under 30 minutes, series over 30 minutes, documentaries, live programming or reality shows? [O1, O4]
- (Q7)** How do users appraise Prime Video's decision to insert advertising by default, while offering an additional fee to remove it? [O1, O3]

The first two questions, which address sociodemographic and market factors, were constructed with reference to GECA's standard respondent-profiling protocols for qualitative research. The remaining questions (Q3–Q7), focused on user perceptions of advertising, draw on an extensive body of scholarship concerning the reception and effectiveness of online-video advertising and the moderating roles of user experience, viewer characteristics and viewing context (Dehghani et al., 2016; Belanche et al., 2017; Bellman et al., 2018; Belanche et al., 2020; Frade et al., 2023).

2.3. Methodological Design

The OTT Barometer is a quarterly survey conducted by the consultancy GECA to track content consumption and user behaviour on streaming platforms in Spain. The present wave was implemented under the following conditions:

- Universe Nationwide population of 2,000 individuals aged 18 or older who report having access to Netflix, Max, Prime Video, Movistar+, Movistar+ Lite, Disney+, Atresplayer Premium, MitelePlus, Filmin, Apple TV+, SkyShowtime, FlixOlé and/or DAZN.
- Instrument Self-administered online questionnaire composed of closed-ended items; the ad hoc questions discussed above were embedded in this instrument.
- Fieldwork 1 – 17 July 2024.

- Sampling error with a 95.5% confidence level (two sigmas) and the most conservative assumption of $P = Q = 50\%$, the maximum margin of error for the 2,000 completed interviews is $\pm 2.19\%$.

For the purposes of this article, analysis was confined to those SVOD platforms operating in Spain that have introduced AVOD tiers—namely, Prime Video, Netflix, Disney+, Atresplayer Premium and SkyShowtime. In this study, an AVOD service is defined as any streaming platform that offers subscription plans incorporating advertising. This clarification is essential because two long-standing monetisation formulas coexist within the streaming ecosystem:

1. **FVOD** (free video on demand), characteristic of video-sharing sites that require no subscription fee (e.g., YouTube);
2. **AVOD** (advertising-based video on demand), whereby users pay a subscription fee *and* are exposed to advertising.

Although both industry practice and academic literature often collapse all advertising-monetised streaming models—free or paid—into the single rubric AVOD, the present research follows the terminology endorsed by MAVISE,³ which distinguishes between video-on-demand platforms and video-sharing platforms. Consequently, YouTube, as an exemplar of the latter category, is excluded from the analytical sample.

2.4. State of the Art and Theoretical Framework

Our theoretical point of departure is the body of research that has examined the determinants of online-video advertising effectiveness—particularly on YouTube—in terms of consumer attention, attitudes toward the advertisement and the brand, purchase intention, and willingness to share content (Logan, 2011; Logan, 2013; Dehghani et al., 2016; Belanche et al., 2017; Bellman et al., 2018; Belanche et al., 2020; Frade et al., 2023).

Scholarly interest in advertising-based video on demand (AVOD) began to intensify in 2021, in parallel with mounting market concerns about the sustainability of pure subscription models and the additional revenue streams that ad-supported tiers could unlock. In a systematic review, Frade et al. (2021) show that most extant studies fall into two broad categories: (i) user-side reception—recall, acceptance, perceived intrusion, and so forth—and (ii) the effectiveness of online-video ad formats, with case studies of YouTube and social media platforms occupying centre stage (Banerjee & Pal, 2022). Shon et al. (2021) argue that extending these lines of inquiry to AVOD environments is essential for clarifying the variables that shape both user experience and the advertising outcomes sought by marketers. The present article therefore makes a timely contribution to what remains a comparatively sparse research field, augmenting recent work on how audiences evaluate AVOD tiers on streaming platforms and on the conditions under which advertising is regarded as an acceptable price for content access (Zhou et al., 2023; Perraud & Rodríguez, 2024; Franks et al., 2024; Cortés-Quesada et al., 2024).

We also engage with studies on the streaming business model (Heredia-Ruiz, 2018; Carroni & Paolini, 2020; Budzinski et al., 2021; Benito-García, 2023; Chalaby, 2023; Neira et al., 2023; Park & Kwon, 2023; McKenzie et al., 2024) and on the competitive advantage conferred by Big Data—especially research into personalisation in over-the-top (OTT) services (Fernández-Manzano et al., 2016; Dudoignon et al., 2019; Furini, 2023; Garganas,

³ MAVISE is a comprehensive database of audiovisual media services, video-sharing platforms and their legal jurisdictions within Europe. It is maintained by the European Audiovisual Observatory and updated on a rolling schedule, with revisions incorporated roughly two months after any change is recorded in the national registers.

2024). Relatedly, we review literature on addressable audiences, which “sell audiences as mere data commodities to broadcasters and advertisers” (Murschetz & Schlütz, 2018, p. 24). These target audiences—defined as groups of individuals who share specific, identifiable traits that render them suitable recipients of a given message—constitute the foundation of a new, data-driven monetisation logic (Shon et al., 2021). Chalaby (2023, pp. 560–561) underscores how

AVOD services innovate by knitting together two markets—audiences and advertisers. Leveraging the return path of streaming to harvest audience data, they optimise inventory sales by personalising messages and targeting consumers on the basis of digital behaviour, location and other criteria.

Furini (2023) likewise explores the potential of such personalisation, which tailors each advertisement to the individual viewer using first-party data held by the platform. Personalisation has become a cornerstone of the platforms’ pitch to advertisers, who are offered a level of segmentation far more granular than that available in linear television. It is also foregrounded in user-facing communications: Netflix, for example, makes it explicit on its website that subscribers to the “Basic with Ads” plan will receive personalised advertising, for which purpose the company requests their date of birth and gender (Perraud & Rodríguez, 2024).

3. Results

This section summarises the principal findings of our investigation into the user experience on VOD platforms that have introduced ad-supported subscription tiers. The results identify overall preferences and the main differences by age, gender and habitat, thereby offering a detailed picture of how Spanish audiences are adapting to this new model of audiovisual consumption.

3.1. User preference for ad-supported versus ad-free plans

The first research question examines whether VOD users subscribe to ad-supported plans or, conversely, prefer ad-free subscriptions (table 1). A pertinent starting point is users’ choices across platforms. Prime Video subscribers display a clear preference for ad-supported tiers, chosen by 60.9% of users—a tendency slightly more pronounced across all age cohorts except those aged 25–34 and among non-metropolitan residents (65.53%). Conversely, 39.1% opt for ad-free plans. Netflix exhibits the reverse pattern, with a majority (60.31%) favouring ad-free subscriptions—a preference especially high among 18–24-year-olds (67.7%) and metropolitan residents (61.62%)—while 39.69% select the ad-supported option. Disney+ subscribers likewise lean towards ad-free tiers, preferred by 64% of respondents overall and by 66.43% in urban areas. Atresplayer Premium shows an almost even split between ad-supported (50.43%) and ad-free plans (49.57%), although men (55.56%) and those aged 45–54 (72.22%) exhibit a modest inclination towards ad-supported subscriptions. SkyShowtime parallels Disney+, with 63.28% of users favouring ad-free plans—a trend particularly marked among 18–24-year-olds (83.33%)—and 36.72% opting for the ad-supported tier. Overall, these results indicate that preferences for ad-supported versus ad-free plans vary significantly by platform, age group, and residential context: younger users and metropolitan dwellers tend to accept ad-supported tiers on Prime Video, whereas Netflix and Disney+ users—especially younger cohorts and non-metropolitan residents—demonstrate a stronger predilection for ad-free access.

Table 1. Type of subscription plan.

		Total	Gender		Age					Location	
			Male	Female	18-24	25-35	35-44	45-54	55+	Non Urban	Urban
Prime Video	A plan WITH ADS	60.9%	60.2%	61.58%	64.58%	53.24%	60.37%	64.72%	61.08%	65.53%	57.29%
	An AD-FREE plan	39.1%	39.8%	38.42%	35.42%	46.76%	39.63%	35.28%	38.92%	34.47%	42.71%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Netflix	A plan WITH ADS	39.69%	41.06%	38.47%	32.3%	40.45%	40.32%	45.66%	37.85%	41.4%	38.38%
	An AD-FREE plan	60.31%	58.94%	61.53%	67.7%	59.55%	59.68%	54.34%	62.15%	58.6%	61.62%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Disney+	A plan WITH ADS	36%	33.65%	37.89%	34.86%	37.41%	35.97%	36.43%	35.23%	39.58%	33.57%
	An AD-FREE plan	64%	66.35%	62.11%	65.14%	62.59%	64.03%	63.57%	64.77%	60.42%	66.43%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Atresplayer Premium	A plan WITH ADS	50.43%	55.56%	47.22%	35.71%	52.38%	45.45%	72.22%	48.39%	42.22%	55.56%
	An AD-FREE plan	49.57%	44.44%	52.78%	64.29%	47.62%	54.55%	27.78%	51.61%	57.78%	44.44%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
SkyShowtime	A plan WITH ADS	36.72%	36.49%	37.04%	16.67%	58.33%	42.31%	35.48%	32.08%	42.11%	32.39%
	An AD-FREE plan	63.28%	63.51%	62.96%	83.33%	41.67%	57.69%	64.52%	67.92%	57.89%	67.61%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: GECA OTT Barometer. Compiled by authors.

3.2. Origin of AVOD-tier subscribers

Regarding whether users were already subscribers when they adopted an ad-supported tier (table 2), the data reveal the following patterns. On Prime Video, 81.29% of ad-tier subscribers had been customers before the introduction of advertising or remained on their plan once ads were added. This figure is particularly high among male respondents (83.77%) and those aged 45-54 (88.7%), whereas 18.71% had not previously subscribed. On Netflix, 69.61% of ad-tier users were legacy subscribers—peaking at 78.65% in the 25-34 age cohort—while 30.39% joined specifically to access the ad-supported option. For Disney+, 72.22% of ad-plan subscribers were incumbent customers, notably men (78.1%) and individuals aged 25-34 (80%), with 27.78% newly subscribing under the ad-supported model. Atresplayer Premium shows an 81.36% retention rate, especially among males (88%) and those aged 35-44 and over 55 (93.33%), with 18.64% joining *de novo*. On SkyShowtime, 76.6% of ad-tier users were already on the platform—rising to 85.19% among men and 100% in the 18-24 cohort—while 23.4% were new subscribers. Collectively, these findings indicate that the majority of ad-supported subscribers were incumbent users, a tendency most pronounced on Prime Video and Atresplayer Premium and somewhat less marked on Netflix and SkyShowtime.

Table 2. Origin of AVOD customers

		Gender			Age					Location	
		Total	Male	Female	18-24	25-35	35-44	45-54	55+	Non Urban	Urban
Prime Video	Already a platform customer (I switched to this plan on purpose or remained on it when ads were included)	81.29%	83.77%	78.9%	72.04%	88.7%	81.6%	82.5%	80.28%	82.63%	80.09%
	Not a platform customer at the time of subscribing to the ad-supported plan	18.71%	16.23%	21.1%	27.96%	11.3%	18.4%	17.5%	19.72%	17.37%	19.91%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Netflix	Already a platform customer (I switched to this plan on purpose or remained on it when ads were included)	69.61%	70.56%	68.7%	65.38%	78.65%	63%	70.25%	69.59%	67.53%	71.33%
	Not a platform customer at the time of subscribing to the ad-supported plan	30.39%	29.44%	31.3%	34.62%	21.35%	37%	29.75%	30.41%	32.47%	28.67%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Disney+	Already a platform customer (I switched to this plan on purpose or remained on it when ads were included)	72.22%	78.1%	68.03%	60.53%	80%	60%	78.72%	77.42%	71.43%	72.86%
	Not a platform customer at the time of subscribing to the ad-supported plan	27.78%	21.9%	31.97%	39.47%	20%	40%	21.28%	22.58%	28.57%	27.14%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Atresplayer Premium	Already a platform customer (I switched to this plan on purpose or remained on it when ads were included)	81.36%	88%	76.47%	20%	72.73%	93.33%	84.62%	93.33%	73.68%	85%
	Not a platform customer at the time of subscribing to the ad-supported plan	18.64%	12%	23.53%	80%	27.27%	6.67%	15.38%	6.67%	26.32%	15%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
SkyShowtime	Already a platform customer (I switched to this plan on purpose or remained on it when ads were included)	76.6%	85.19%	65%	100%	57.14%	90.91%	81.82%	70.59%	79.17%	73.91%
	Not a platform customer at the time of subscribing to the ad-supported plan	23.4%	14.81%	35%	0%	42.86%	9.09%	18.18%	29.41%	20.83%	26.09%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: GECA OTT Barometer. Compiled by authors.

3.3. Impact of advertising on the user experience

With respect to the impact of advertising on user experience (table 3), 76% of Prime Video subscribers report that their viewing experience has not been materially affected by the insertion of ads, indicating that this outcome aligns with their expectations for an ad-supported

subscription. This sentiment is more prevalent among male respondents (78.28%) and those aged 45–54 (82.5%). Conversely, 23.98% perceive the advertising as more bothersome than anticipated, particularly women (26.15%) and viewers aged 18–24 (33.33%). Similarly, 80.0% of Netflix users indicate that advertising has not significantly disrupted their experience; this view is especially common among female subscribers (81.3%) and those aged 45–54 (84.3%), whereas 20.0% find the ads more intrusive than expected, notably 18–24-year-olds (36.54%). On Disney+, 75.4% of respondents believe that advertising has not substantially affected their viewing experience, a proportion that rises to 77.55% among women and to 87.23% in the 45–54 age group. Nonetheless, 24.6% consider the advertising more intrusive than anticipated, most markedly among 18–24-year-olds (47.37%). Atresplayer Premium exhibits a comparable pattern: 77.97% of users report that their experience remains largely unaffected, particularly among female subscribers (85.29%) and residents of metropolitan areas (84.21%), while 22.03% find the ads more bothersome than expected—most notably men (32.0%). Finally, on SkyShowtime, 82.98% of ad-supported subscribers do not perceive a significant deterioration in their viewing experience, rising to 96.3% among men and to 100.0% among 18–24-year-olds, whereas 17.02% regard the advertising as more intrusive than anticipated, especially those aged 25–34 (42.86%). Taken together, these findings indicate that the majority of users across all platforms consider the introduction of advertising to have had only a minimal adverse effect on their overall streaming experience.

Table 3. User perception of advertising in AVOD plans

		Total	Gender		Age					Location	
			Male	Female	18–24	25–35	35–44	45–54	55+	Non Urban	Urban
Prime Video	Not significantly affected. It was more or less what I expected from an ad-supported subscription.)	76.02%	78.28%	73.85%	66.67%	66.96%	72.39%	82.5%	80.28%	76.67%	75.44%
	Significantly affected. I find the advertising more annoying than I expected (due to volume, placement, etc.)	23.98%	21.72%	26.15%	33.33%	33.04%	27.61%	17.5%	19.72%	23.33%	24.56%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Netflix	Not significantly affected. It was more or less what I expected from an ad-supported subscription.)	80%	78.63%	81.3%	63.46%	74.16%	83%	84.3%	83.78%	80.52%	79.57%
	Significantly affected. I find the advertising more annoying than I expected (due to volume, placement, etc.)	20%	21.37%	18.7%	36.54%	25.84%	17%	15.7%	16.22%	19.48%	20.43%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Disney+	Not significantly affected. It was more or less what I expected from an ad-supported subscription.)	75.4%	72.38%	77.55%	52.63%	74.55%	72%	87.23%	83.87%	76.79%	74.29%
	Significantly affected. I find the advertising more annoying than I expected (due to volume, placement, etc.)	24.6%	27.62%	22.45%	47.37%	25.45%	28%	12.77%	16.13%	23.21%	25.71%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Not significantly affected. It was more or		77.97%	68%	85.29%	60%	81.82%	73.33%	76.92%	86.67%	84.21%	75%

		Gender			Age					Location	
		Total	Male	Female	18-24	25-35	35-44	45-54	55+	Non Urban	Urban
Atresplayer Premium	less what I expected from an ad-supported subscription.)										
	Significantly affected. I find the advertising more annoying than I expected (due to volume, placement, etc.)	22.03%	32%	14.71%	40%	18.18%	26.67%	23.08%	13.33%	15.79%	25%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
SkyShowtime	Not significantly affected. It was more or less what I expected from an ad-supported subscription.)	82.98%	96.3%	65%	100%	57.14%	81.82%	81.82%	94.12%	79.17%	86.96%
	Significantly affected. I find the advertising more annoying than I expected (due to volume, placement, etc.)	17.02%	3.7%	35%	0%	42.86%	18.18%	18.18%	5.88%	20.83%	13.04%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: GECA OTT Barometer. Compiled by authors.

Another question sought to evaluate users’ perceptions of advertising volume on streaming platforms relative to other media (Table 4). The results indicate that 29.86% of respondents consider streaming services to carry fewer advertisements than YouTube—a view more prevalent among men (31.53%) and those aged 45–54 (32.55%)—while 46.82% perceive the ad load to be comparable to YouTube’s, particularly women (46.97%) and individuals aged 55 or older (50.7%), and 23.32% believe streaming platforms feature more ads than YouTube, especially the 25–34 cohort (36.09%). Relative to linear television, 30.21% judge streaming platforms to have fewer commercials (notably men, 30.63%, and those over 55, 33.07%), 37.46% regard the volume as equivalent (especially women, 38.3%, and 25–34-year-olds, 45.56%), and 32.33% find streaming services more heavily ad-laden than television (most pronounced among those aged 55+, 37.05%). In comparison with Instagram, 30.12% perceive fewer ads on streaming platforms (particularly women, 31.02%, and those aged 35–54, 30.2%), 50.44% report an equivalent ad load (especially men, 52.25%, and respondents aged 55+, 55.43%), and 19.43% believe streaming services carry more ads (notably 25–34-year-olds, 26.04%). Finally, benchmarked against TikTok, 31.18% consider streaming platforms to feature fewer advertisements (especially women, 32.06%, and 18–44-year-olds, 37.9%), 49.73% view the ad volumes as similar (most commonly men, 50.27%, and those over 55, 54.87%), and 19.08% judge streaming services to have more ads than TikTok (particularly 25–34-year-olds, 21.89%). Overall, these findings demonstrate that perceived advertising density on streaming platforms varies significantly by comparator medium: it is generally regarded as equal to or lower than on YouTube and conventional television, whereas perceptions relative to Instagram and TikTok are more polarized, albeit with a substantial minority still viewing streaming services as less ad-intrusive.

Table 4. User perception of advertising in AVOD plans compared to other services.

		Gender			Age					Location	
		Total	Male	Female	18-24	25-35	35-44	45-54	55+	Non Urban	Urban
YouTube	The platforms have FEWER ads than...	29.86%	31.53%	28.25%	30.65%	18.93%	31.11%	32.55%	32.03%	30.17%	29.59%
	The platforms have the SAME number of ads as...	46.82%	46.67%	46.97%	43.55%	44.97%	44.44%	46.27%	50.7%	45.65%	47.8%
	The platforms have MORE ads than...	23.32%	21.8%	24.78%	25.81%	36.09%	24.44%	21.18%	17.27%	24.18%	22.6%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Conventional television	The platforms have FEWER ads than...	30.21%	30.63%	29.81%	32.26%	22.49%	26.67%	32.55%	33.7%	30.75%	29.76%
	The platforms have the SAME number of ads as...	37.46%	36.58%	38.3%	45.16%	45.56%	38.22%	39.22%	29.25%	37.52%	37.4%
	The platforms have MORE ads than...	32.33%	32.79%	31.89%	22.58%	31.95%	35.11%	28.24%	37.05%	31.72%	32.85%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Instagram	The platforms have FEWER ads than...	30.12%	29.19%	31.02%	31.45%	28.99%	30.22%	30.2%	30.08%	32.11%	28.46%
	The platforms have the SAME number of ads as...	50.44%	52.25%	48.7%	42.74%	44.97%	48.44%	52.55%	55.43%	47.97%	52.52%
	The platforms have MORE ads than...	19.43%	18.56%	20.28%	25.81%	26.04%	21.33%	17.25%	14.48%	19.92%	19.02%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
TikTok	The platforms have FEWER ads than...	31.18%	30.27%	32.06%	37.9%	31.36%	32.89%	30.98%	27.86%	31.53%	30.89%
	The platforms have the SAME number of ads as...	49.73%	50.27%	49.22%	44.35%	46.75%	47.11%	49.41%	54.87%	49.32%	50.08%
	The platforms have MORE ads than...	19.08%	19.46%	18.72%	17.74%	21.89%	20%	19.61%	17.27%	19.15%	19.02%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: GECA OTT Barometer. Compiled by authors.

3.4. Attention to advertising

We also inquired whether users perceive themselves as paying greater or lesser attention to advertisements on streaming platforms compared with other media (table 5). The findings reveal that 40.28% of respondents report attending more closely to ads on streaming services than to those on conventional television, YouTube, or social networks—a tendency that peaks among 25–34-year-olds, 55.62% of whom indicate heightened attention to streaming ads. Conversely, 59.72% of participants state that their advertising engagement remains consistent across all media, a pattern particularly pronounced among those aged 55 and above (74.37%).

Table 5. Users' Overall Attention and Perceived Intrusiveness toward Advertisements on Streaming Platforms, Compared with

	Total	Gender		Age					Location	
		Male	Female	18-24	25-35	35-44	45-54	55+	Non Urban	Urban
General Advertising Attention										
Yes, I believe I pay more attention to the advertisements on these platforms than to those on other media.	40.28%	39.82%	40.73%	48.39%	55.62%	45.78%	41.96%	25.63%	41.97%	38.86%
No, I would say that my behaviour towards advertising is similar to that in other media.	59.72%	60.18%	59.27%	51.61%	44.38%	54.22%	58.04%	74.37%	58.03%	61.14%
Perceived Intrusiveness by Content Type										
Film	42.49%	44.32%	40.73%	41.94%	42.01%	42.22%	45.1%	41.23%	41.78%	43.09%
Series under 30 minutes	38.69%	36.4%	40.9%	46.77%	41.42%	41.33%	37.25%	33.98%	39.26%	38.21%
Series over 30 minutes	30.04%	32.07%	28.08%	30.65%	41.42%	33.33%	29.41%	22.84%	29.4%	30.57%
There is no specific content that annoys me more than others.	24.73%	25.77%	23.74%	9.68%	15.38%	21.78%	25.88%	35.38%	24.18%	25.2%
Documentaries	16.61%	17.12%	16.12%	16.13%	18.93%	17.33%	14.51%	16.71%	14.31%	18.54%
Live programmes or broadcasts	15.11%	13.15%	16.98%	19.35%	17.75%	16.89%	11.37%	13.93%	14.51%	15.61%
Reality shows	9.63%	6.85%	12.31%	16.13%	16.57%	11.11%	5.1%	6.41%	8.9%	10.24%

Other Media and by Content Type. Source: GECA OTT Barometer. Compiled by authors.

3.5. Perceived Advertising Intrusiveness as a Function of Content Type

Our survey further investigated users' perceptions of advertising nuisance across different content genres (table 5). In the case of films, 42.49% of respondents found in-movie advertising particularly bothersome, with comparable proportions among men (44.32%) and women (40.73%), and a slightly elevated irritation rate in the 45-54 age cohort (45.10%). Among series under 30 minutes, 38.69% of participants reported annoyance, a sentiment most pronounced in the 18-24 (46.77%) and 25-34 (41.42%) age groups. For series exceeding 30 minutes, 30.04% of users experienced discomfort—especially men (32.07%) and those aged 25-34 years (41.42%). A further 24.73% indicated that advertising is equally intrusive regardless of content type, a view most common among respondents aged 55 and over (35.38%). Documentaries provoked irritation in 16.61% of viewers, with minimal gender variation (17.12% of men vs. 16.12% of women). Live programmes and broadcasts elicited annoyance in 15.11% of cases, more frequently among women (16.98%) than men (13.15%). Finally, reality shows were deemed the least intrusive, with only 9.63% of respondents expressing displeasure—though this figure rose to 12.31% among women and 16.57% among 25-34-year-olds. Collectively, these findings demonstrate that advertising within films and episodic series is perceived as significantly more disruptive than ads in other formats, particularly among specific demographic segments.

3.6. Reaction to the Default Inclusion of Advertising (Prime Video Case)

We also examined opinions on Prime Video's decision to make its ad-supported tier the default for all subscribers, with the option to pay an additional fee to remove advertising (table 6). Overall, 49.5% of respondents indicated that they had no objection to the inclusion of ads provided that the subscription price remained unchanged—a view slightly

more prevalent among men (51.15%) than among women (47.88%). Indifference was highest among those aged 45–54 (55.02%) and lowest among the 25–34 cohort (40.28%), with minimal variation between metropolitan (50.32%) and non-metropolitan (48.46%) residents. Conversely, 40.03% of participants expressed disapproval of the measure, a sentiment more common among women (41.53%) than men (38.51%). The strongest rejection emerged in the 25–34 (52.78%) and 35–44 (44.44%) age groups, whereas those aged 55 or older were least likely to object (34.63%). Again, metropolitan (39.54%) and non-metropolitan (40.65%) respondents registered virtually identical levels of opposition. Finally, 10.47% of the sample reported no clear opinion on the matter. Taken together, these results illustrate that, although a slight majority of users are willing to accept advertising on Prime Video provided prices do not increase, a substantial minority actively rejects the change—suggesting that platforms must carefully manage user expectations and experience to avoid driving subscribers to competing services.

Table 6. User assessment of Prime Video’s decision to make the ad-supported plan the default option for all its customers.

	Total	Gender		Age					Location	
		Male	Female	18–24	25–35	35–44	45–54	55+	Non Urban	Urban
I don’t mind, as long as they don’t increase the price.	49.5%	51.15%	47.88%	47.22%	40.28%	46.67%	55.02%	52.47%	48.46%	50.32%
This measure makes me feel negatively towards the platform.	40.03%	38.51%	41.53%	43.06%	52.78%	44.44%	34.63%	34.19%	40.65%	39.54%
I do not have a well-formed opinion on this matter (N/A).	10.47%	10.34%	10.59%	9.72%	6.94%	8.89%	10.36%	13.33%	10.89%	10.14%

Source: GECA OTT Barometer. Compiled by authors.

4. Discussion, Conclusions and Future Lines of Research

4.1. Discussion

This study has successfully addressed the objectives and research questions outlined in Table 2. It confirms that the introduction of the AVOD model in Spain has been broadly accepted by users; however, this acceptance hinges on a balance between cost, perceived value, and the degree of advertising intrusiveness (which varies by content type and platform). Notably, the primary motivation for selecting ad-supported plans is economic (O₂). Although overall preferences for ad-supported versus ad-free plans differ by platform, age, and locale (Q₁), the majority of AVOD subscribers were already customers before opting for an ad-supported tier or remained on their plan when ads were introduced (Q₂). This trend is particularly pronounced for Prime Video (81.29%) and Atresplayer Premium (81.36%).

While many users are willing to tolerate advertising in order to maintain a lower subscription fee (Q₇), a significant minority may consider alternative services—or even cancel their subscriptions—if their expectations and viewing experience are not carefully managed. In Spain, ad-supported plans have thus functioned primarily as a retention mechanism, supporting the hypothesis that price sensitivity is a key driver of subscriber churn in OTT services (Carroni & Paolini, 2020; Franks et al., 2024).

From the standpoint of user experience—the dimension most directly influenced by audience perceptions of advertising (O₁)—the frequency and duration of ads in AVOD plans are generally perceived as reasonable. Most AVOD subscribers report that advertising has not severely disrupted their viewing (Q₃), suggesting that the standard

non-skippable pre-, mid-, and post-roll formats afford a degree of perceived intrusiveness reduction (Frade et al., 2023). However, tolerance is not uniform: younger viewers find ads significantly more intrusive than older cohorts who have grown up with commercial television (Dehghani et al., 2016). This may reflect that younger audiences had internalized the SVOD promise of uninterrupted viewing, and thus perceive the reintroduction of ads as a loss of autonomy. Nonetheless, compared with other online advertising formats, AVOD remains relatively favorably positioned: 40.28% of respondents report paying more attention to streaming ads than to those on traditional television, YouTube, or social media (Q5), a pattern most evident among 25–34-year-olds.

Perceptions of advertising also vary systematically by platform (O3) and by content type (O4), echoing earlier findings (Logan, 2011; Logan, 2013; Cortés-Quesada et al., 2024). Similarly, views on ad volume in streaming services (Q4) differ according to the comparator medium: users generally perceive streaming platforms to have fewer or similar ad loads compared with YouTube and traditional television, whereas perceptions are more divided relative to Instagram and TikTok.⁴ Furthermore, ads placed within films and episodic series are deemed more bothersome than those in live programming or reality shows (Q6), adding nuance to prior work that identified an inverse relationship between perceived intrusiveness and both ad quality and product involvement (Belanche et al., 2017).

Finally, the AVOD model in Spain has crystallized in two strategic variants: offering a lower-cost, ad-supported tier as a churn-reduction lever, or imposing a premium surcharge to avoid ads. Prime Video's broader Prime subscription proposition—which bundles shipping benefits with streaming—undercuts resistance to advertising by shifting the value calculus in favor of the ad-supported option, whereas other platforms have seen an opposite dynamic (O3, Q7).

4.2. Conclusions and Future Lines of Research

The strong reception of ad-supported subscription services (AVOD) in Spain rests principally on audiences viewing advertising as a reasonable exchange for reduced subscription fees. The lower price point is a key incentive, particularly as most new AVOD subscribers migrated from existing SVOD plans. This migration presents a noteworthy growth opportunity in the Spanish market, where legacy television—long characterized by heavy commercial saturation—remains the primary reference.⁵

Despite this initial success, AVOD in Spain faces significant medium- and long-term challenges, chief among them being demand elasticity for ad-supported pricing. As with SVOD, subscription rates must reflect perceived content value and account for alternative access options (Franks et al., 2024). Thus, offering a high-quality, distinctive content catalogue will be critical to sustaining the value proposition of ad-supported tiers. Long-term viability will also depend on platforms' ability to manage customer satisfaction by controlling ad intrusiveness to preserve a positive user experience and hence ensure retention. Because ad breaks inherently introduce greater friction than ad-free viewing, consumption intensity will become a central factor in advertising strategy. In this context, Big Data analytics will be essential for optimizing

⁴ The advertising saturation standard currently applied by streaming platforms is four minutes per hour of programming

⁵ In Spain, following the approval of the General Audiovisual Communication Law in 2022, up to 144 minutes of advertising are permitted between 6:00 a.m. and 6:00 p.m., and 72 minutes between 6:00 p.m. and midnight (BOE-A-2022-11311).

ad loads through sophisticated audience segmentation, thereby delivering more efficient and less obtrusive advertising.

After a period in which the sustainability of on-demand streaming has been questioned due to profitability pressures, advertising offers a vital avenue for enhancing average revenue per user (ARPU) and strengthening financial health—potentially enabling reinvestment in content libraries. As Furini (2023, p. 6) observes, “AVOD holds significant potential but remains in its early stages, with no definitive studies yet on the most effective ways to present advertising to engage viewers.” Future research could fruitfully explore:

a. User Perception Analysis

- Advertising reception (recall, acceptance, perceived intrusiveness, etc.).
- Overall user experience.
- Individualized ad relevance based on platform data versus traditional television paradigms.

b. Advertising Effectiveness in AVOD

- Efficacy of various ad formats (by content type, placement, frequency, skipability).
- Metrics and reporting standards for measuring ad effectiveness.
- Big Data applications and benefits of personalized advertising in over-the-top environments.
- Case studies of addressable audience strategies.

c. AVOD’s Role in Broader Streaming Strategies

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