

UNderstanding and making the most of Connected TV post-COVID-19

The global COVID-19 pandemic has seen an acceleration in the consumption of connected TV (CTV) content, which is not reflected in many media plans.

Previous research by Unruly showed that 54% of the UK population are spending more time watching CTV content since the start of the pandemic, second only to a 67% increase in time spent on mobile devices. UK consumers' pivot to CTV is an opportunity for brands to reach TV audiences at scale in a highly targeted, personalised way that has, until now, not been possible.

With a plethora of new CTV channels and devices entering the market, the competition for CTV audiences' attention is rising rapidly. For brands and publishers this means it is more important than ever to understand and embrace CTV advertising.

To help navigate the transition to CTV, Unruly, has conducted a global survey of 2,562 consumers in the US and the UK that builds on our [previous research on the impact of the COVID-19 pandemic](#), conducted in April 2020.

Our latest research, carried out in July 2020, identifies consumers' attitudes to CTV, consumption habits and ad preferences five months after the global outbreak of the COVID-19 pandemic. The following analysis looks specifically at the UK.

For additional analysis, visit hi@unrulygroup.com.



Everything you need to know about CTV today



It's not what you think it is!



1. Free, ad-supported TV users **are more likely to take positive actions** after being exposed to CTV ads across both brand favourability and performance metrics compared to the average TV viewer thanks to unprecedented targeting capabilities



2. **UK consumers are actively seeking free, ad-supported CTV content and abandoning linear TV** to save money



3. The quality and breadth of **CTV content attracts audiences of all ages, at scale**, not just millennials

The competition for CTV audiences' attention is rising rapidly... now is the time for brands to act!



Key Findings

UK TV viewers are connected

The majority of the UK population have access to CTV content through one or more connected devices and there is a widespread preference for free, ad-supported services.



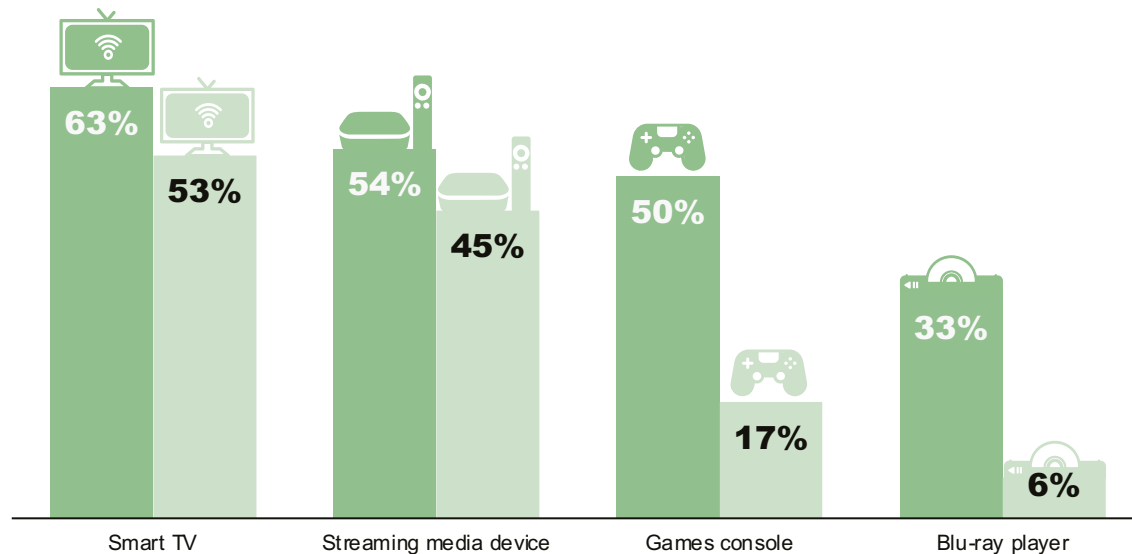
82%
HAVE ACCESS
TO CTV

18%
DO NOT HAVE
ACCESS TO CTV

% of the population who has access to CTV

This shift away from linear TV is causing UK brands to evaluate their TV strategies and ensure their media plans and budgets reflect current viewership.

■ Adoption among UK population ■ % who use more than 5 times per week



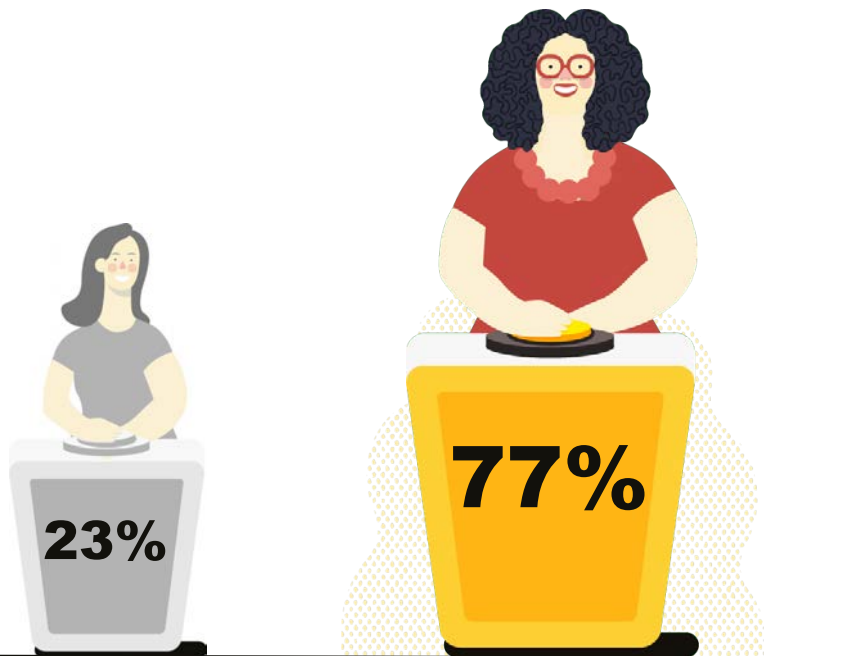
Device breakdown and consumption



Key Findings

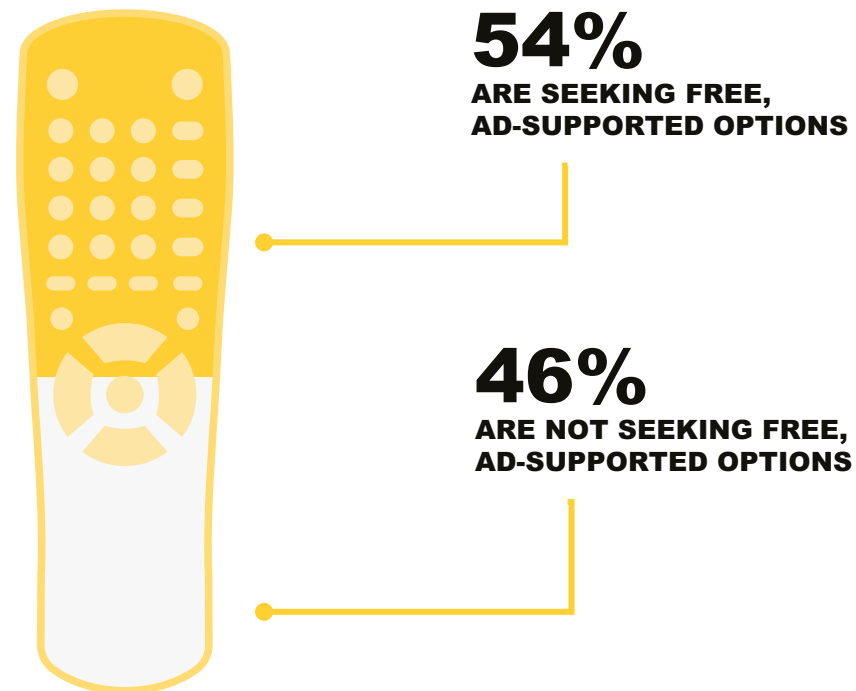
UK TV viewers prefer ad-supported content, on-demand

Changes in consumer lifestyle, turbulent economic times, the rising costs of cable and satellite TV and the emergence of many new free-to-view, ad-supported streaming services have resulted in a shift away from paying for TV content.



% of UK consumers who prefer to use free-ad supported services vs. paid for ad-free options

As a result, brands are re-evaluating budget allocation on a channel-by-channel basis to ensure that spend is divided according to current trends rather than repeating legacy plans.



% of UK consumers who actively seek free, ad-supported options

Key Findings

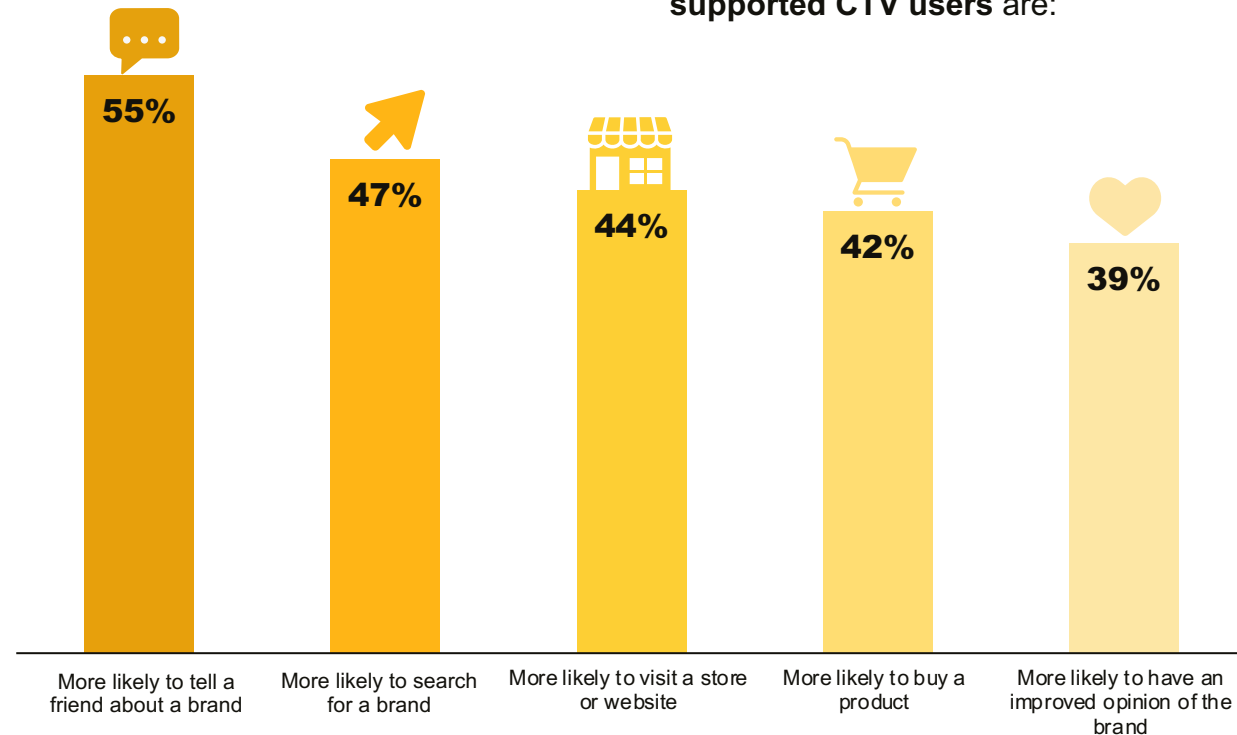


CTV advertising drives more positive outcomes

UK consumers are more likely to take positive actions after being exposed to CTV ads across both brand favourability and performance metrics.

The more advanced targeting capabilities and the ability to personalise CTV ads results in superior campaign performance because ads are more relevant to individual consumers compared to linear TV ads.

Compared to the average UK TV viewer, after seeing an ad on TV ad-supported CTV users are:





Key Findings

The COVID-19 pandemic has accelerated the growth of CTV

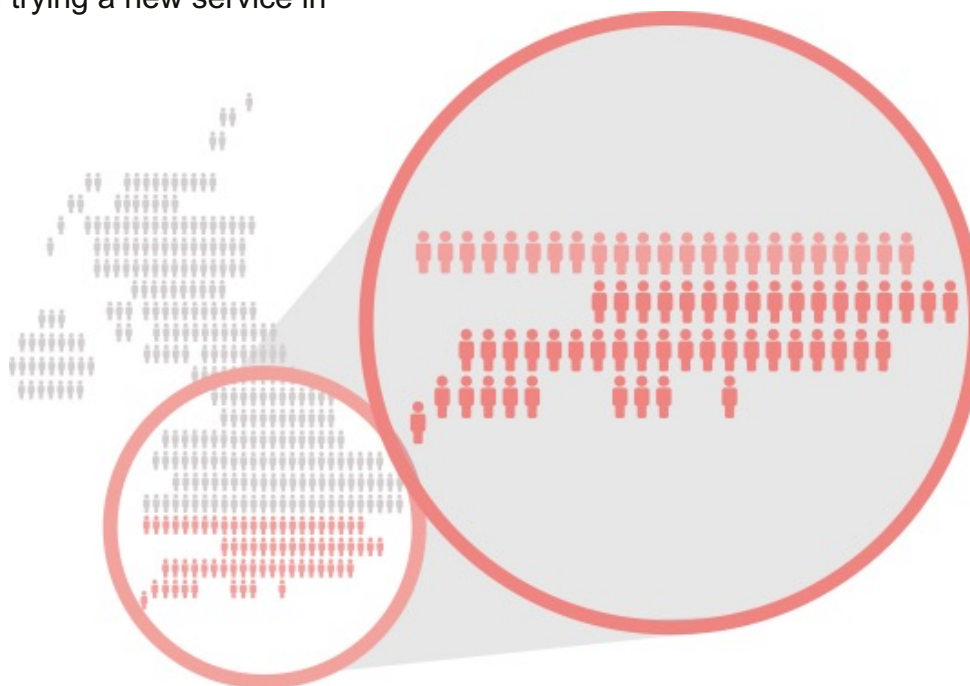
Our previous research revealed that since the outbreak of the COVID-19 pandemic 54% of UK consumers are spending more time watching connected TV.

Free, ad-supported streaming services have become particularly popular, with a significant proportion of the UK population trying a new service in the past 5 months.

The quantity of content available via free, ad-supported services is meeting increasing consumer demand, with the majority of those who have tried a new free service planning to continue using their new streaming service in the future.

21%

TRIED A NEW AD-SUPPORTED STREAMING SERVICE SINCE THE OUTBREAK OF COVID-19



74%
OF THESE WILL CONTINUE TO DO SO

% of people who have tried a new free streaming service since the outbreak of COVID-19

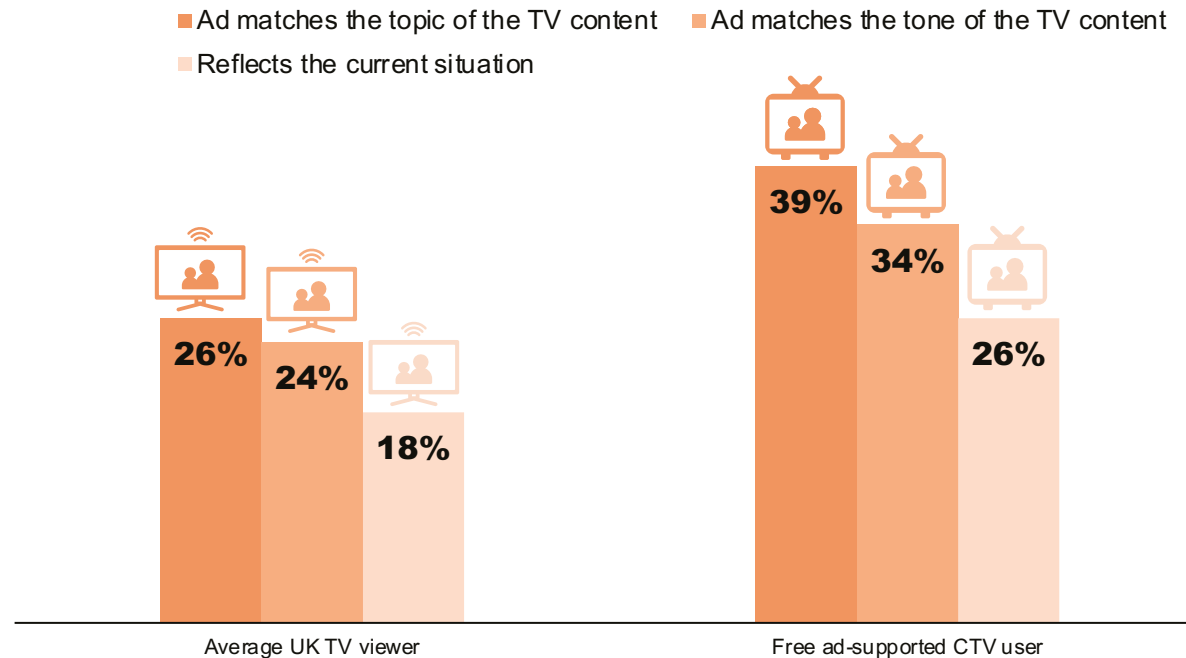


Key Findings

CTV ads are highly memorable

Due to more advanced targeting capabilities, free, ad-supported CTV users are more likely to find an ad memorable compared to linear TV viewers because it matches the topic or tone of the content they are watching, or reflects the current situation.

Aligning an ad with the topic and tone of the TV content in which it's shown minimises the interruption to the user experience and increases relevancy, which is proven to drive better performance compared to generic demographic targeting. Ads that reflect significant changes in society, such as the COVID-19 pandemic are also more likely to resonate with consumers because they demonstrate an understanding of consumers' daily lives.



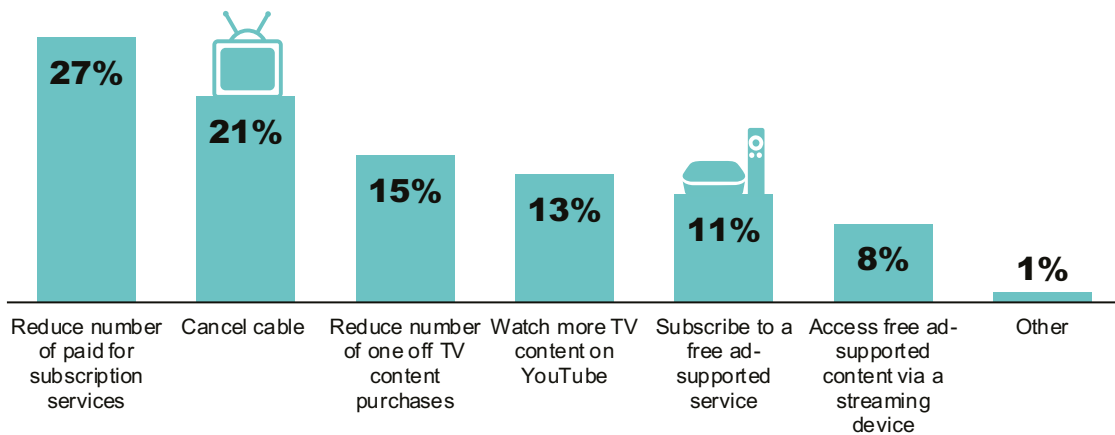
What makes an ad memorable by TV viewer type



Key Findings

UK consumers are actively planning to adopt more ad-funded TV content

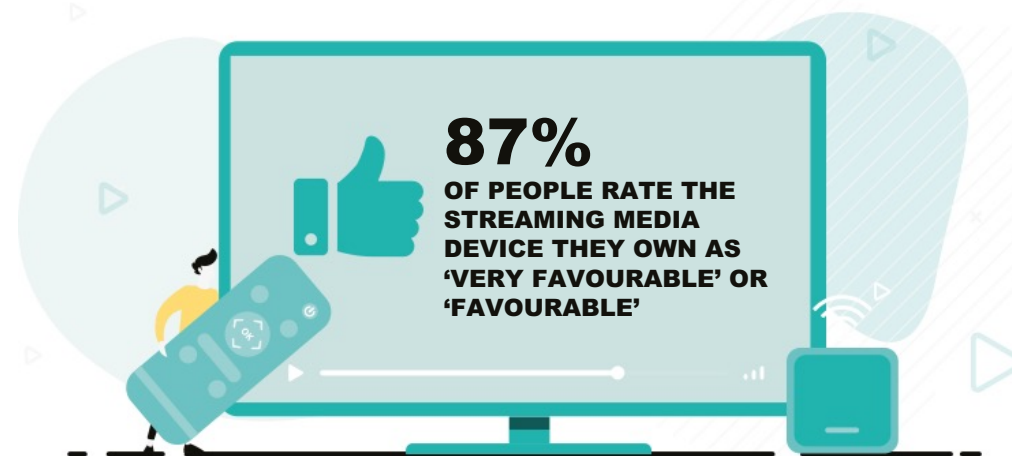
Consumer lifestyle changes, an uncertain economic climate and the growing costs of watching cable and satellite TV are driving UK consumers to reconsider how much they spend on TV content.



Ways in which UK consumers plan to reduce spend on TV content

Over half (57%) of consumers in the UK plan to reduce the amount they pay for TV services in one form or another. Those who already own a streaming media device or use an ad-funded streaming service are more likely to cancel cable TV.

Additionally, **87% of people who own a streaming media device rate it as 'very favourable' or 'favourable'**, so as adoption continues to grow, so will the audience size and reach on CTV.



% of UK population who rate the streaming media device they own as 'very favourable' or 'favourable'



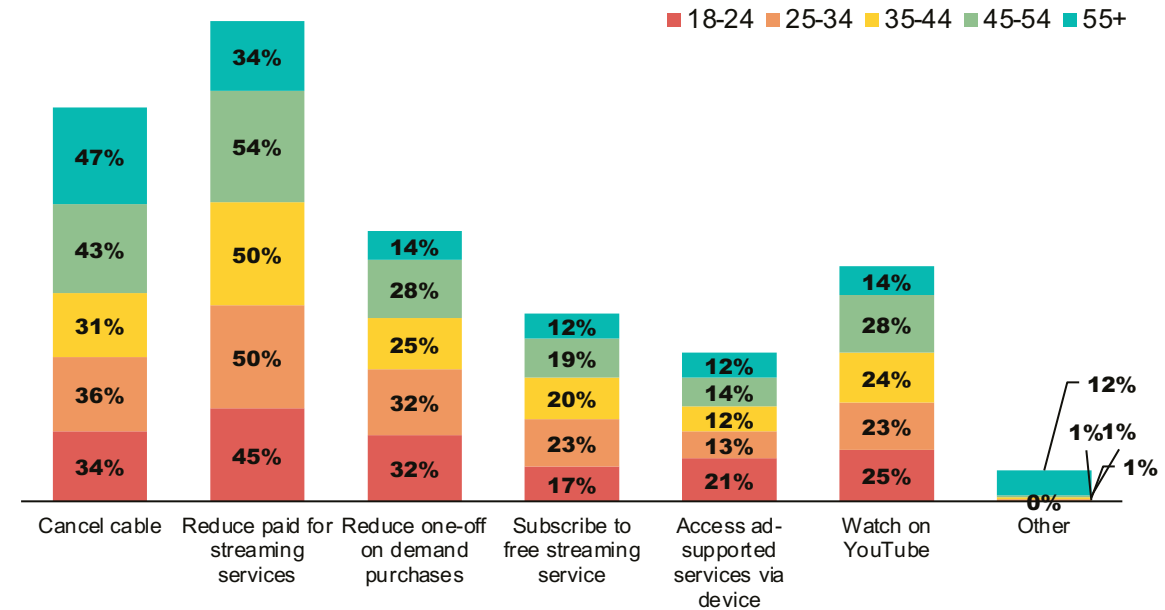
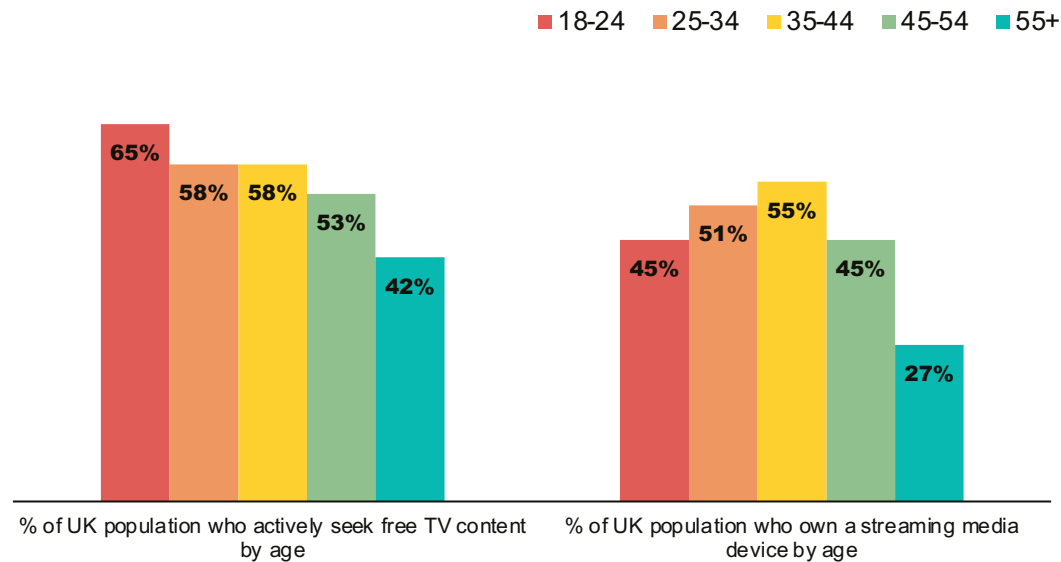
Key Findings

Age trends

Many of the trends that we have seen hold true across all age brackets.

However, there are notable differences in the proportion of people in different age brackets who actively seek free-of-charge TV content, own a streaming media device and plan to reduce spend on TV services.

Differences in CTV consumption between different age groups represents an opportunity for brands to tailor their media plans to ensure optimal reach across all target audiences. Differences in action after seeing a TV ad is an opportunity to personalise ads to the predominant action. Differences in plans to reduce spend show the need to create media plans that are adaptable in order to maximise performance in times of change.



Ways users plan to reduce monthly media spend



Summary

More relevant targeting and more personalised creative means UK CTV viewers are more likely to have **an improved opinion of the brand**, more likely to buy a product and more likely to visit a store or website after being exposed to an ad than the average UK TV viewer

1

Over half (57%) of consumers in the UK plan to reduce the amount they pay for TV services in one form or another. One quarter (27%) plan to reduce the number of paid for streaming services they use, and one fifth (21%) plan to cancel cable TV

2

82% of the UK population now have access to connected TV (CTV) content. More than three-quarters (77%) of UK consumers say they would prefer to watch their favourite TV programme free of charge with ads rather than pay to watch ad-free

3

Almost a quarter (21%) of UK consumers have tried a new ad-supported streaming service since the outbreak of the COVID-19 pandemic. Of those, 74% say they will continue to do so

4

Over half (54%) are actively seeking ways to watch TV programmes and films free of charge

5

87% of Brits who own a streaming media device rate it as 'very favourable' or 'favourable', so as adoption continues to grow, so will the audience size and reach on CTV

6



How UnrulyX Can Help You Monetise Your CTV Inventory



We have global direct relationships with top brand and agency buyers, and connections with all major DSPs to drive more competition for your inventory.

Tap into advertising budgets across the buying spectrum – including TV, video and digital – for CTV, video and display.

Our data-powered insights, including exclusive UnrulyEQ solutions and TV viewership data, enables advertisers to better target relevant audiences at scale, which benefits CTV app publishers by delivering more relevant ads.





Unruly's research has revealed many changes in consumers' TV content consumption habits since the COVID-19 pandemic beyond the well-documented increase in time spent watching TV.

There are many factors that influence media planning and require consideration and frequent analysis on a brand-by-brand basis. Early identification of trends in consumption by device, content preferences, cross-channel performance as well as differences across audience demographics help brands to maximise performance and minimize wasted ad spend. This approach should be combined with a flexible approach to media planning which allows for adaptation as consumer behaviour changes and technology evolves.

This approach should be combined with a flexible approach to media planning which allows for adaptation as new trends emerge.

To find out more about how Unruly can help you reach your most engaged audiences, at scale, across all screens, please visit unruly.co or contact us at hi@unrulygroup.com

UNRULY

Don't just reach people.
Move people.



ABOUT UNRULY

Unruly is one of the largest independent supply side ad platforms in the world. Publishers use Unruly's global relationships with premium demand partners, reader-friendly ad formats, self-serve tools and dedicated support team to maximize their revenue across a range of different screens, including CTV, mobile and desktop.

A pioneer in bringing emotional intelligence to digital advertising, Unruly's innovative tech, unique audience insights and creative solutions also enable brands and agencies to seamlessly engage global consumers in premium, brand-safe environments.

Part of the Tremor International group (AIM: TRMR), Unruly is on a mission to transform digital advertising for the better. Our brand and agency-led council, the U7, meet regularly to shape the future of digital marketing and we are a founding member of the WFA's Global Alliance for Responsible Media.

Don't just reach people, **move people.**