

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 this means it is more important than ever to understand and embrace CTV advertising.

To help brands navigate the transition to CTV, Unruly, in collaboration with Tremor Video, 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, please contact 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



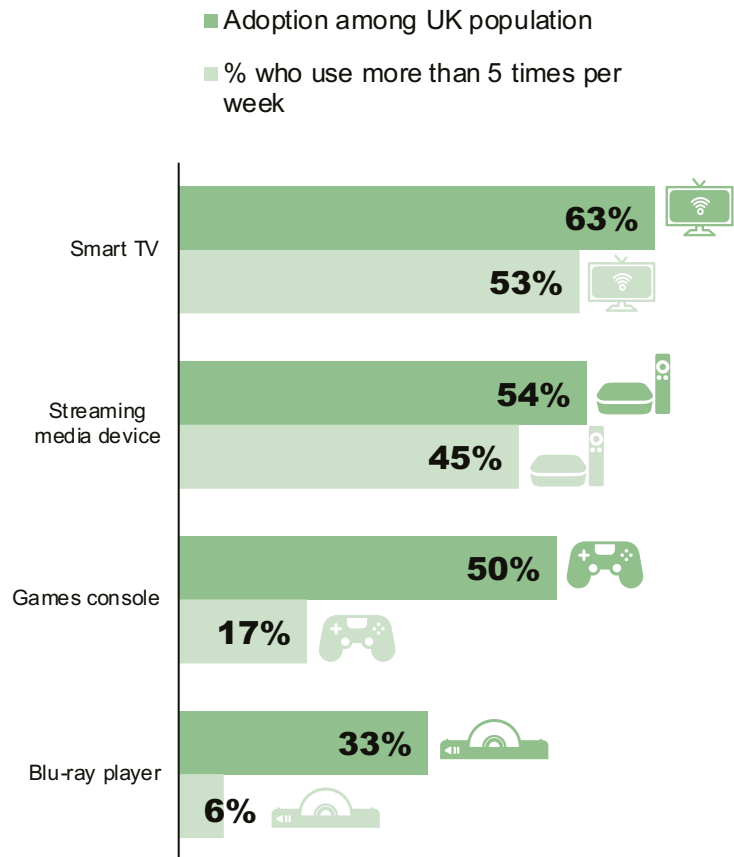
3. The quality and breadth of **CTV content attracts audiences of all ages, at scale**, not just millennials

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



Key Findings

UK TV viewers are connected



Device breakdown and consumption



% of the population who have access to CTV content

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.

This shift away from linear TV shows a clear need for UK brands to evaluate their TV strategies and ensure their media plans and budgets reflect current viewership.

To ensure they make the most of CTV advertising and gain incremental audience reach, brands need to take into account the diverse media landscape.

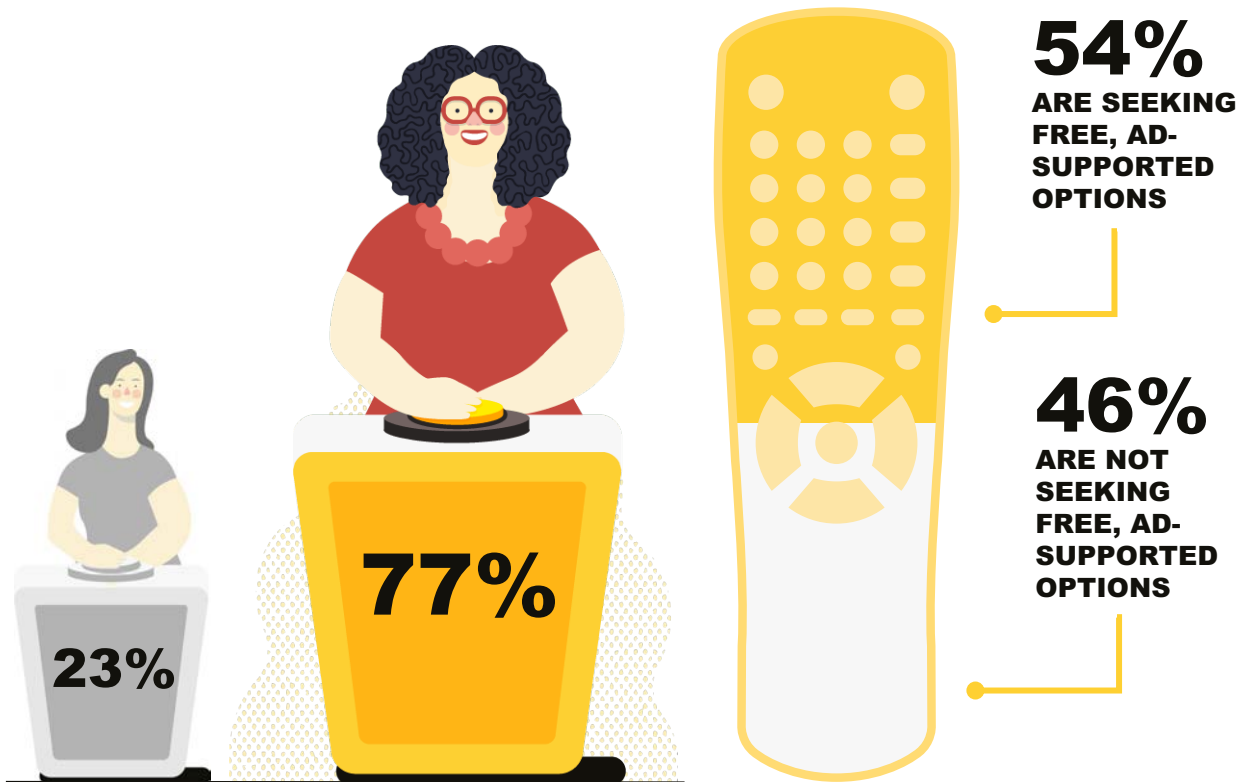
HOW UNRULY CAN HELP

Unruly enables brands to reach highly engaged CTV audiences across all devices at scale. We leverage exclusive audience data and captivating creative experiences to bring storytelling to life on the biggest screen in the home. In addition, our commitment to brand protection through partnership with top-tier ad verification vendors extends into CTV to ensure delivery in the best and safest environments possible.



Key Findings

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



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

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

54%
ARE SEEKING
FREE, AD-
SUPPORTED
OPTIONS

46%
ARE NOT
SEEKING
FREE, AD-
SUPPORTED
OPTIONS

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

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

HOW UNRULY CAN HELP

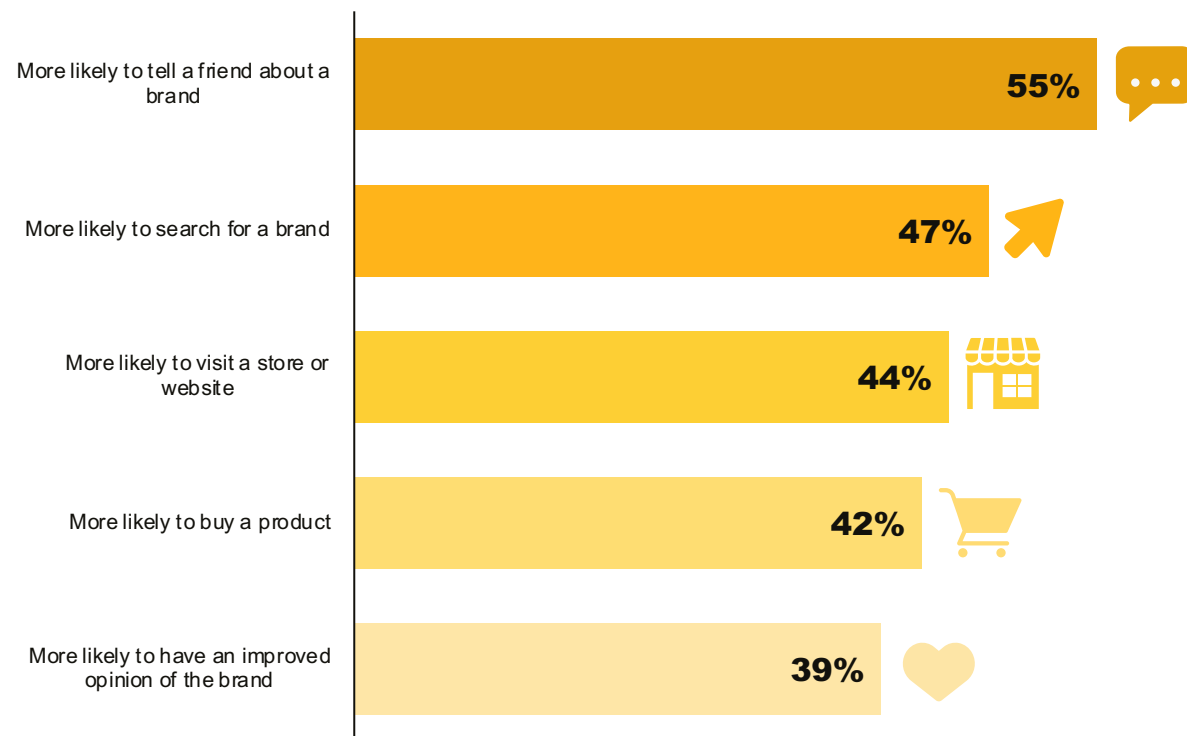
Unruly has access to ad supply from all major CTV app publishers, enabling brands to scale up their campaigns through our unified platform.



Key Findings

CTV advertising drives more positive outcomes

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



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.

HOW UNRULY CAN HELP

Unruly Custom Audiences and our creative optimisation tools enable brands to maximise the performance of CTV advertising by targeting your most receptive audiences using the most engaging aspects of your creative assets.



Key Findings

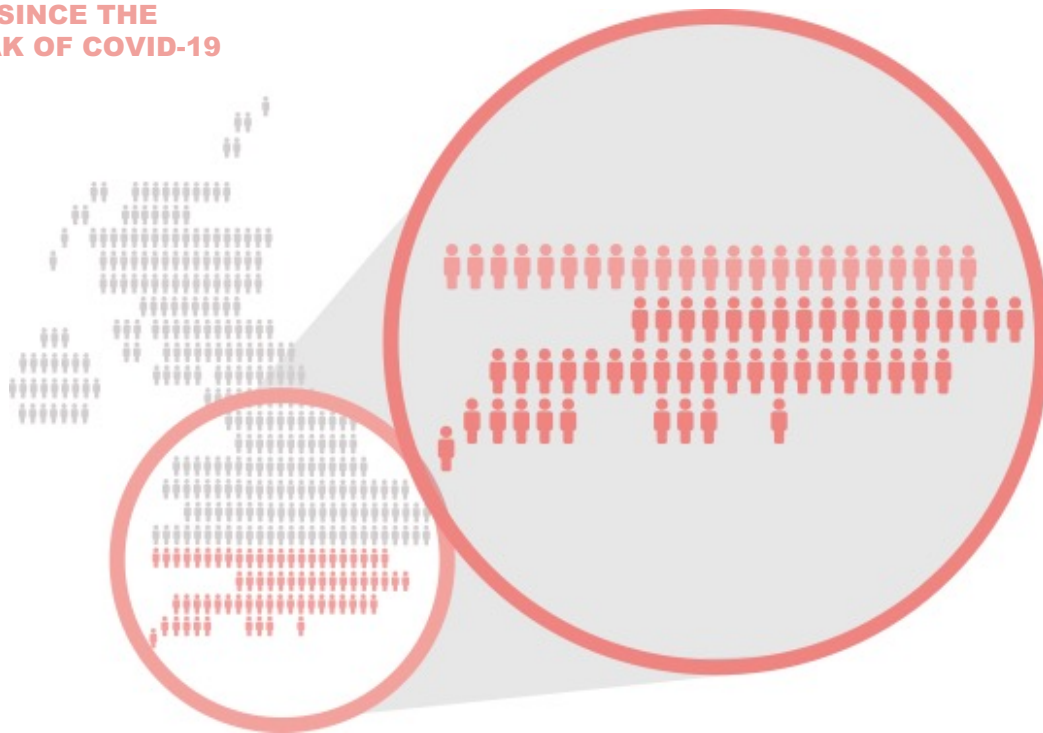
The COVID-19 pandemic has accelerated the growth of CTV

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

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.

HOW UNRULY CAN HELP

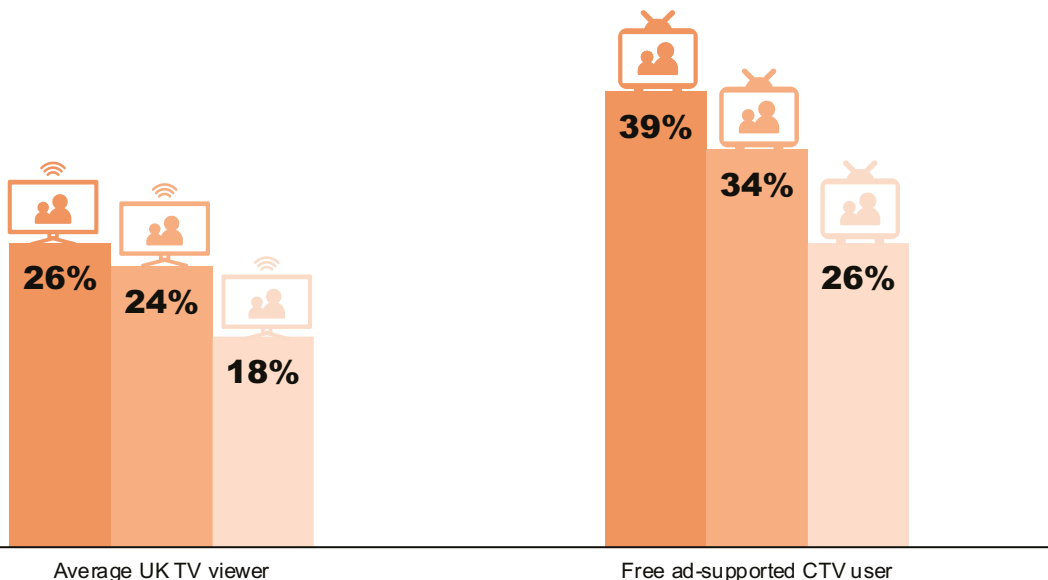
Unruly's wide-reaching CTV ad supply, built on direct CTV app publisher relationships, enables brands to reach engaged audiences, at scale, in premium, brand safe environments.



Key Findings

CTV ads are highly memorable

- Ad matches the topic of the TV content
- Ad matches the tone of the TV content
- Reflects the current situation



What makes an ad memorable by TV viewer type

Due to more advanced targeting capabilities, free, ad-supported CTV users are more likely to find an ad memorable compared to the average UK TV viewer 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.

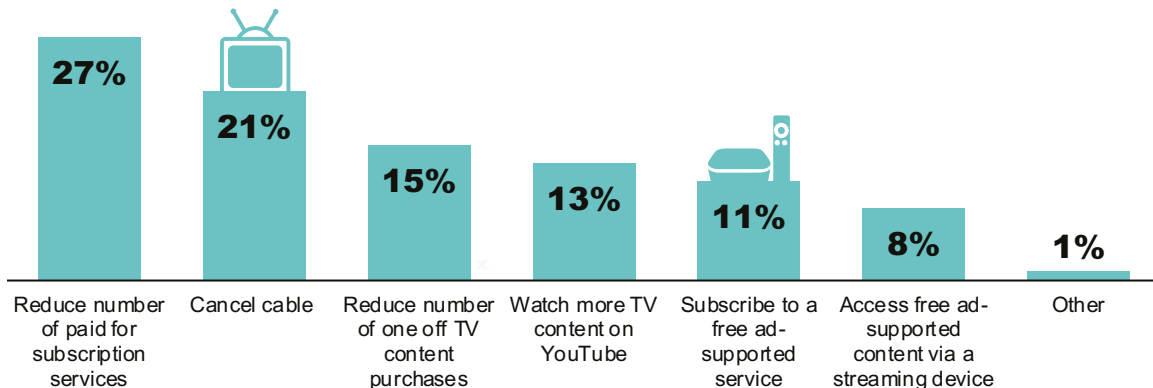
HOW UNRULY CAN HELP

Unruly enables brands to match ads to different genres of CTV content and to quickly change creative as and when events occur that have significant changes on the world around us.

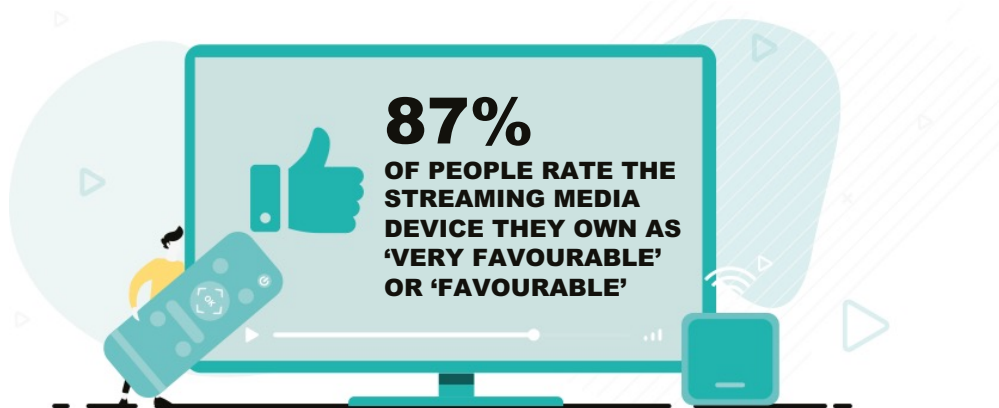


Key Findings

UK consumers are actively planning to adopt more free, ad-supported TV content



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



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

Consumer lifestyle changes, an uncertain economic climate and the increasing costs of watching cable TV are driving UK consumers to reconsider how much they 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 – the most popular options being reducing the number of paid for services they subscribe to and cancelling cable TV. Those who already own a streaming media device or use an ad-funded streaming service are more likely to cancel cable or satellite TV.

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

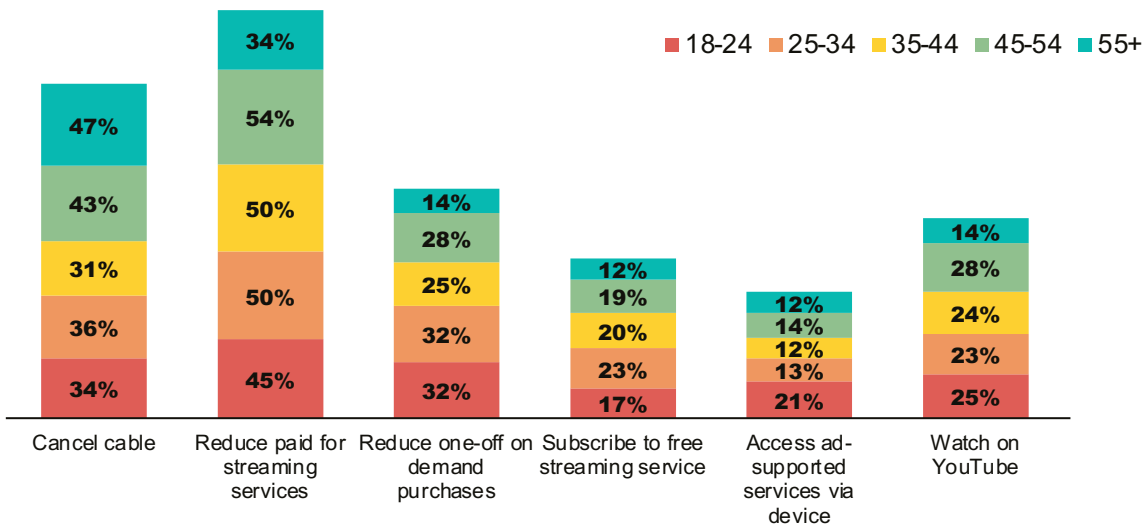
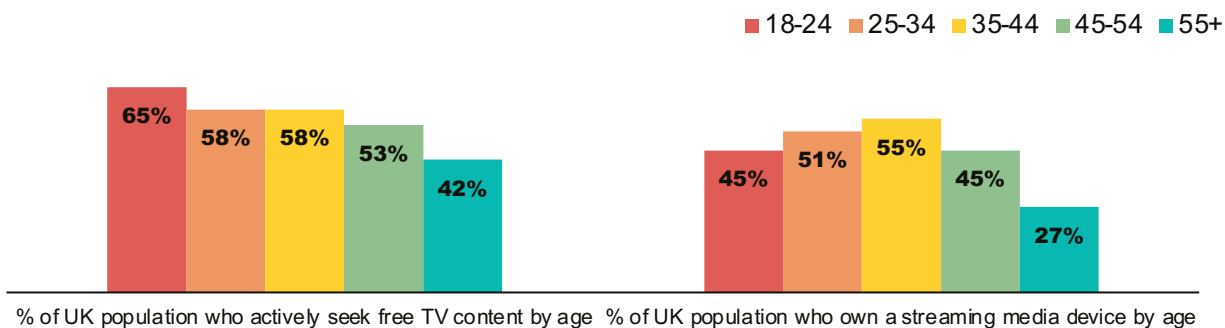
HOW UNRULY CAN HELP

Unruly's real-time, cross-channel campaign insights enable brands to make data-driven decisions about budget allocation in order to maximise the performance of digital campaigns and reach audiences as they move away from traditional TV services.



Key Findings

Age trends



Ways users plan to reduce monthly media spend

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, ad-supported 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.

HOW UNRULY CAN HELP

Unruly's Insights team is here to help you navigate the changing CTV landscape. Our teams provide real-world consumer research, media insights and bespoke performance insights tailored to your goals.



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





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 minimise 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.

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.**