



2022 Connected Viewers

All eyes on streaming



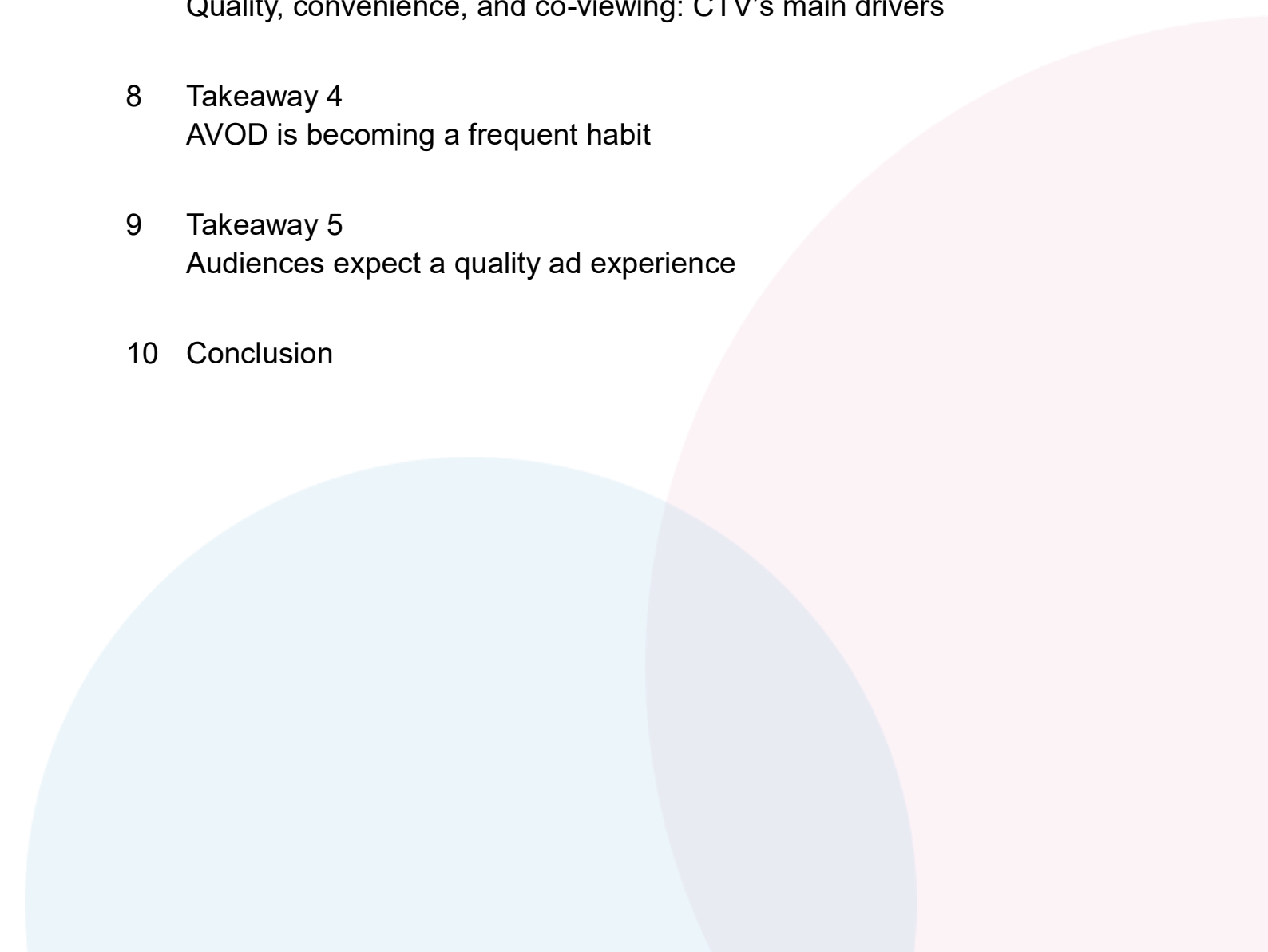
2022
CONNECTED VIEWERS
ALL EYES ON STREAMING

UK FINDINGS

FREEWHEEL
A COMCAST COMPANY

A consumer insight from FreeWheel in collaboration with Happydemics, the online consumer research specialist.

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Introduction

Video is now defined by infinite choice. Audiences can watch whenever and wherever they want, using a broad range of devices, platforms and services. While the TV screen remains the focal point of the household, the way viewers access video on all screens has evolved with the rise of streaming and video on demand (VOD) services.

FreeWheel collaborated with Happydemics, the online consumer research specialist, to conduct a consumer survey exploring UK audiences' opinions of connected TV (CTV) and media platforms, including VOD and free ad-supported streaming (FAST) services, as well as their current viewing habits.





Methodology

Working with FreeWheel, Happydemics gathered preferences and opinions from over 3,300 connected consumers in Europe. The answers were collected online between 28 February and 3 March 2022, forming part of a nationally representative study that included the UK, France, Germany, Spain, the Netherlands and Italy (“EU6”)*.

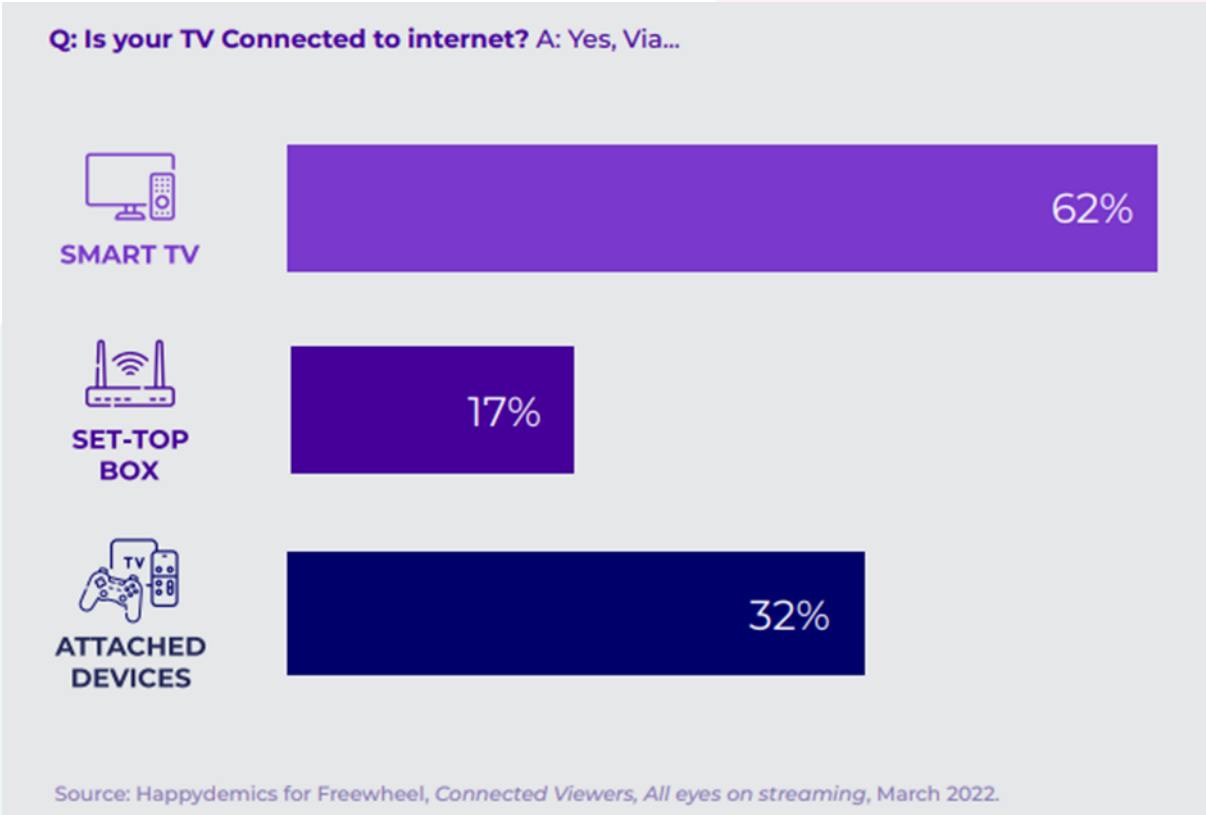
** The study conducted by Happydemics for FreeWheel was gathering opinions from over three thousand connected viewers (3354) in: the UK (572), France (681), Germany (483), Italy (583), Spain (564) and the Netherlands (471) representative of the local population*

Takeaway 1

Smart TV adoption is gaining momentum

When connecting their TV to the internet, consumers typically use external devices, set-top boxes, or a Smart TV's integrated capabilities. Most UK audiences prefer the latter, with 62% of CTV viewers who participated in the survey using their TV's direct internet connection, they were 50% in 2021 to do so.

Almost one in three UK CTV users surveyed watch CTV via an external device, increasing to more than one in two for Gen Z viewers (aged 18- 24). The findings show the maturity of today's 'aware' connected viewers which will use multiple means to access their favourite content.

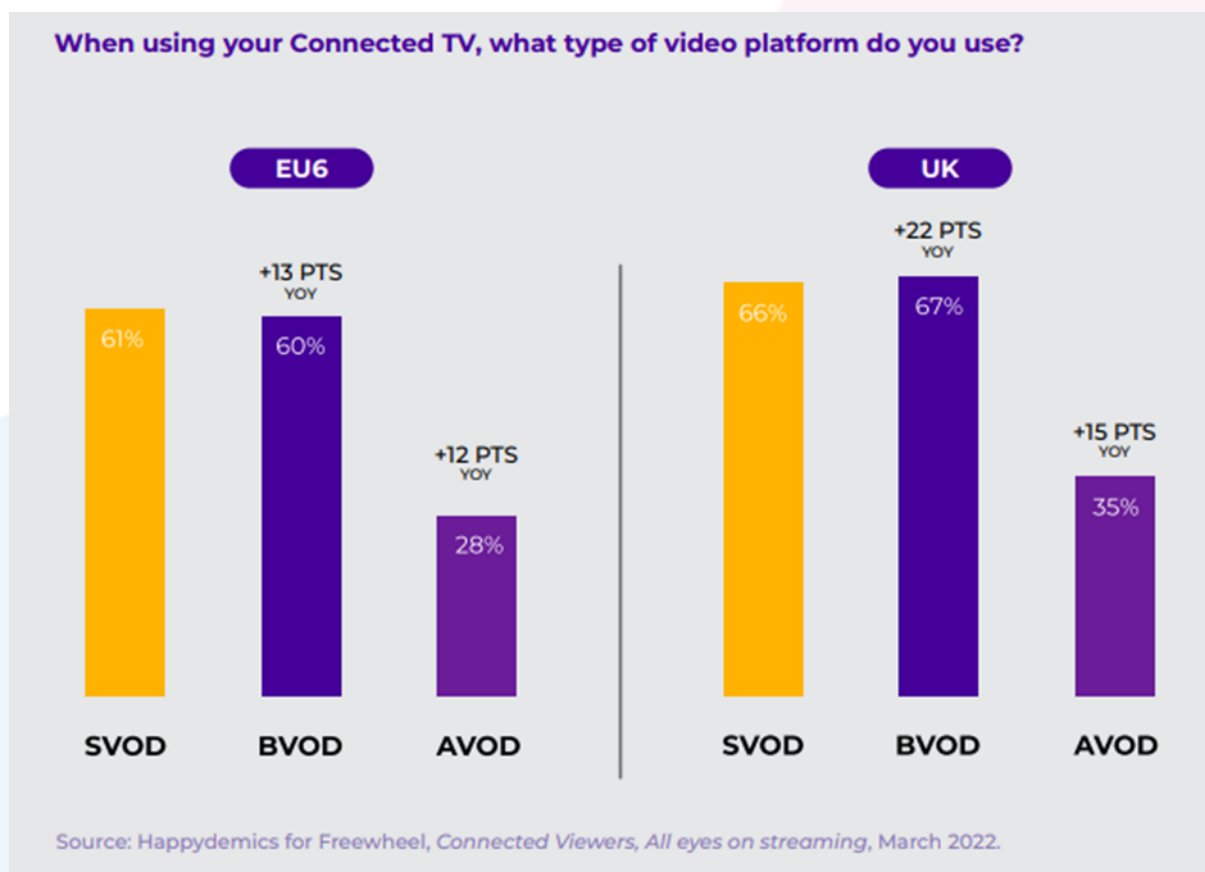


Takeaway 2

CTV users enjoy long-form premium video

Overall, CTV is widely used for accessing long-form premium videos. Across the regions just under two-thirds of consumers surveyed is using their CTV to stream BVOD (incl. Live) or SVOD platforms.

According to the study, CTV viewers in the UK also have the highest rate of adoption (35%) for ad-supported video-on-demand (AVOD) out of all the EU6 countries. These nascent platforms are growing fast, as consumers are looking for more ways to access different types of premium video content.



Takeaway 3

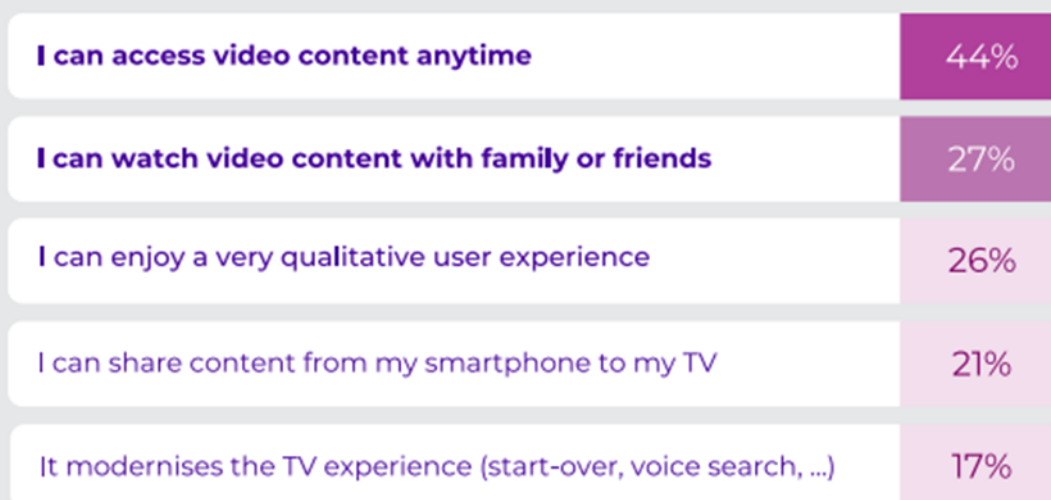
Quality, convenience, and co-viewing: CTV's main drivers

The study revealed that UK audiences have a big appetite for streaming, as the average CTV viewer in the UK is signed up to 5 streaming platforms, compared with the EU6 average of 3.5 platforms.

More than two-fifths (44%) of the UK survey respondents said being able to access video content whenever they want is their primary reason for using CTV. Alongside convenience, the connected audiences surveyed ranked the ability to watch with family and friends (27%) and the quality user experience (26%) as a key influence behind their viewing habits. Coviewing is an important aspect that needs to be taken into account when planning CTV ad campaigns.

The study also shows that, Gen Z respondents especially value CTV for its exceptional user experience, appreciating its better user interfaces, larger screens, and greater sound.

Why do you enjoy watching video content on connected TV?



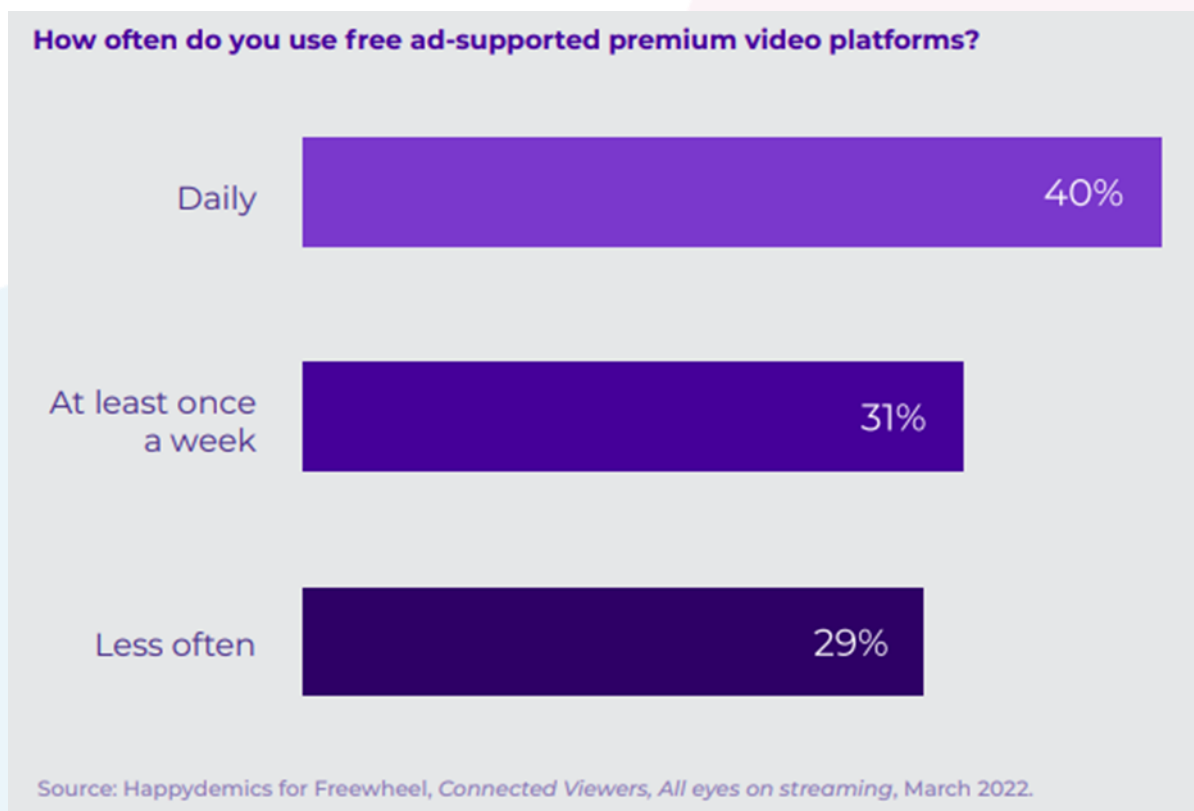
Source: Happydemics for Freewheel, *Connected Viewers, All eyes on streaming*, March 2022.

Takeaway 4

AVOD is becoming a frequent habit

UK audiences are keen to access more premium video content through a selection of streaming services, and they are increasingly turning to AVOD and FAST platforms to do so.

More than 70% of AVOD users who participated in the survey watch ad-supported video platforms every week, with 40% being daily users. As a result, watching ad-supported premium video is now an established part of their viewing habits. Almost three-quarters (74%) of UK AVOD users surveyed consider the cost-free aspect of these platforms to be the key driver for adopting them, while 38% are tuning in to AVOD because of its great choice of content.



Takeaway 5

Audiences expect a quality ad experience

CTV users believe premium video platforms, including AVOD and BVOD, deliver the most attention-grabbing and qualitative ad experience in comparison with social media (64% against 22%) and user-generated video platforms (64% against 14%). The large screens used to watch premium video, alongside the high-quality content and sound, mean marketers can leverage BVOD and AVOD as impactful channels to engage UK audiences.

Additionally, marketers can focus on ensuring CTV ads are relevant to amplify engagement, with almost a half (45%) of the connected UK viewers surveyed indicating a preference for ads related to personal interests or hobbies. Millennials (aged 25-34) are especially receptive to ads that mirror their lifestyles (34%).

Marketers looking to deliver personalised messages should however keep in mind that CTV users are concerned about their data. Almost two-thirds (64%) of connected viewers surveyed do not want to share their information to receive personalised advertising, making it critical for all players in the data-driven advertising ecosystem to prioritise the user and data privacy within their strategies.

What do you like the most about these free ad-supported premium video platforms?

Ads related to my personal interests (hobbies)

45%

Ads fitting my current lifestyle

28%

Ads aligned with the brands I already like

23%

Brands & products in line with my values (ethics, sustainability)

21%

Geo-located ads that promote local stores or services near my home

21%

Conclusion

Using Smart TVs, external devices, and set-top boxes, UK CTV audiences are looking to access a widening range of streaming and VOD services. Driven by the flexible, lean-back viewing experience, CTV adoption is presenting marketers with opportunities to reach highly-engaged audiences in premium video environments. With ad-supported platforms becoming a frequent part of viewers' schedules, marketers must keep consumers' privacy concerns front of mind when planning impactful CTV campaigns.

To learn more about consumer attitudes towards CTV, explore our findings from the other EU6 markets surveyed:

[Explore EU6 Findings](#)

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Want to know more

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