

FREOWHEEL
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VIEWERS INSIGHTS

CTV-AVOD

2021

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UNDERSTANDING

CTV HABITS AND VOD CONSUMPTION

**4,452 RESPONDENTS
ACROSS EUROPE
SHARED THEIR VIDEO
PREFERENCES**

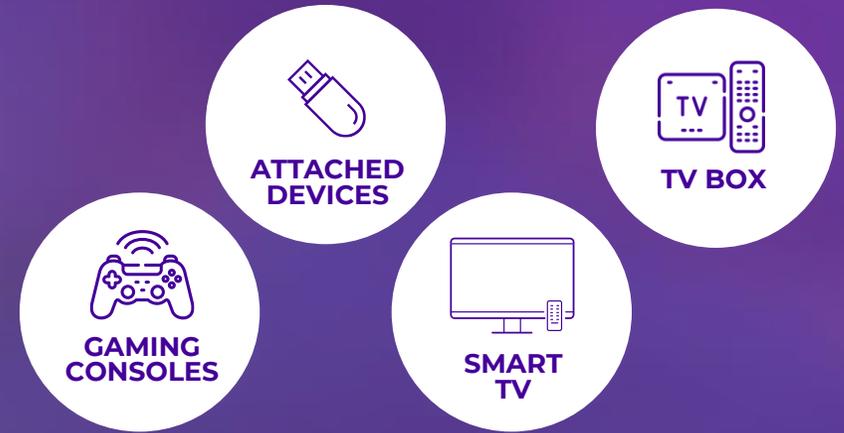


HOW ARE VIEWERS CONNECTED ?



CTV/OTT

Connected TV, or CTV, is a television set that is connected to the internet, either via an external OTT device (box, streaming device...) or built-in capabilities (Smart TV) and facilitates the delivery of streaming video content. Ad placements on CTV are typically bought and sold more like digital video than linear TV.



IPTV

Internet Protocol Television, or IPTV, is the delivery of TV programs to the consumers via a set-top box (STB) provided by an Internet Service Providers (ISPs). Through the STB, users can access a package of channels as well as different services such as replay, start over or time-shifted video on demand. IPTV is an additional distribution model to satellite, cable and digital terrestrial TV.

VIEWERS USE

3 TYPES OF PLATFORMS

TO WATCH ON-DEMAND VIDEO



BVOD : B for Broadcaster Video-On-Demand (VOD). This is the content made available on-line and on-demand from the traditional TV broadcast channels.



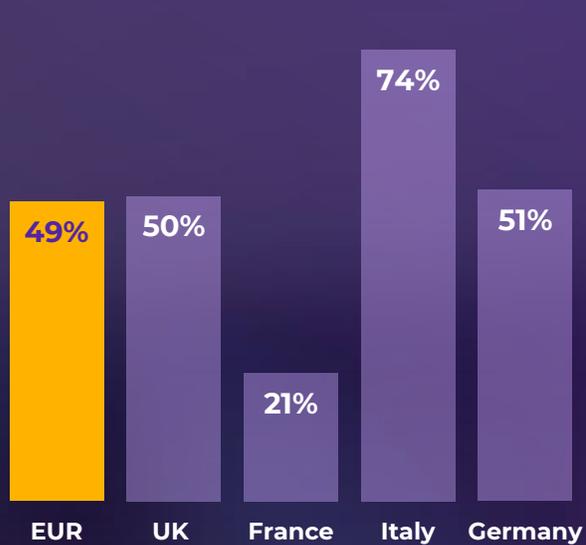
SVOD : S for Subscription, it requires the audience to pay a recurring fee in order to access ad-free video content.



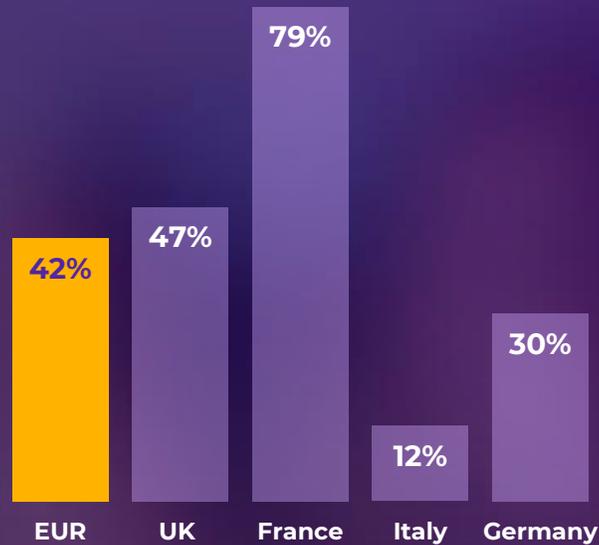
AVOD : A for Advertising, access to content is free, but in exchange the viewers are exposed to advertisements prior and/or during content.

70% OF EU4 HAVE CONNECTED THEIR TV TO THE INTERNET

AND PRIMARILY VIA SMART TV



SMART TV



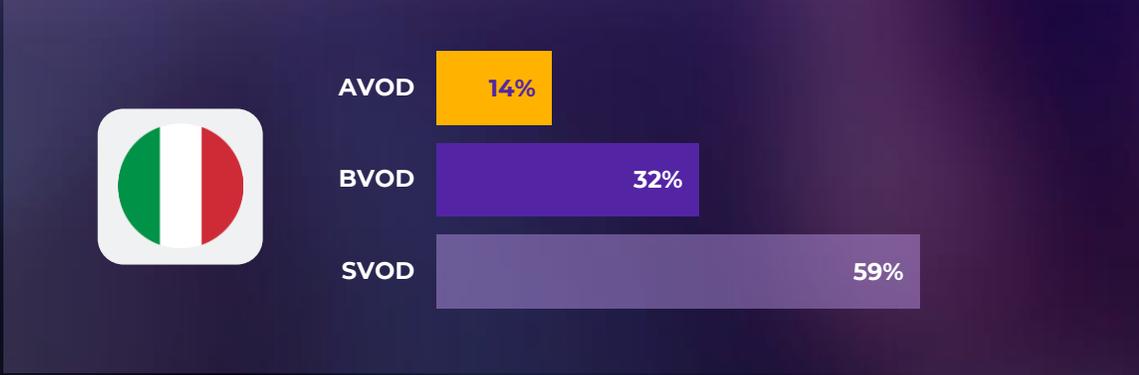
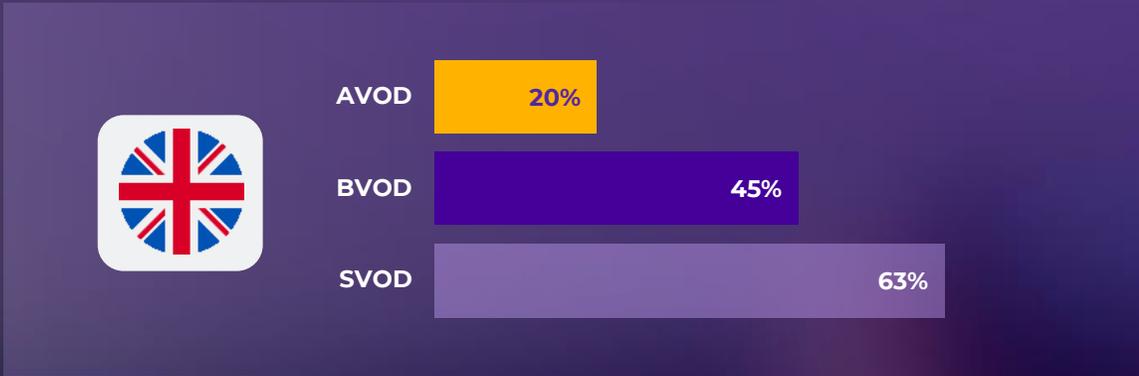
TV SET-TOP BOX



ATTACHED DEVICES

89% USE VIDEO ON-DEMAND PLATFORMS

MAINLY SVOD AND BVOD



Use of video media platforms by types on CTV

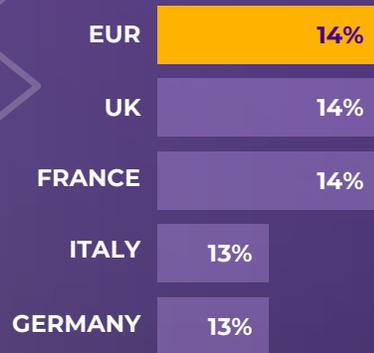
Source: FreeWheel CTV-AVOD Survey conducted by Happydemics - 4452 respondents representative of the European population – March 2021

**AMONG THE 11% OF
RESPONDENTS THAT
NEVER USE VOD
PLATFORMS,**

**30% ARE
INTERESTED IN
AVOD PLATFORMS**

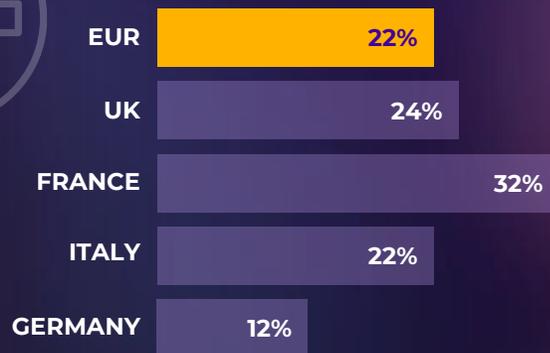


EUR Would use
AVOD to replace
SVOD

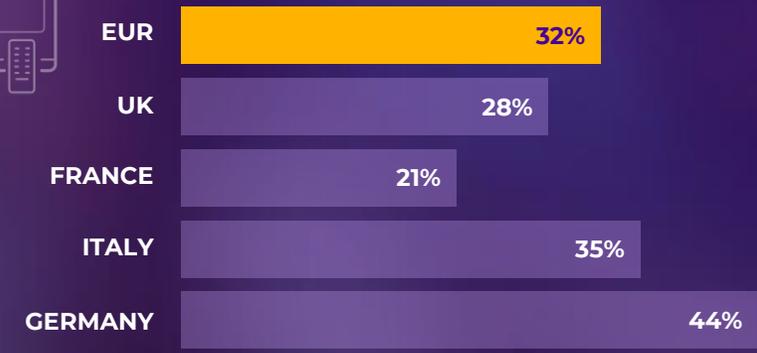


68% OF EU4 SVOD USERS **SHOW** **INTEREST FOR AVOD**

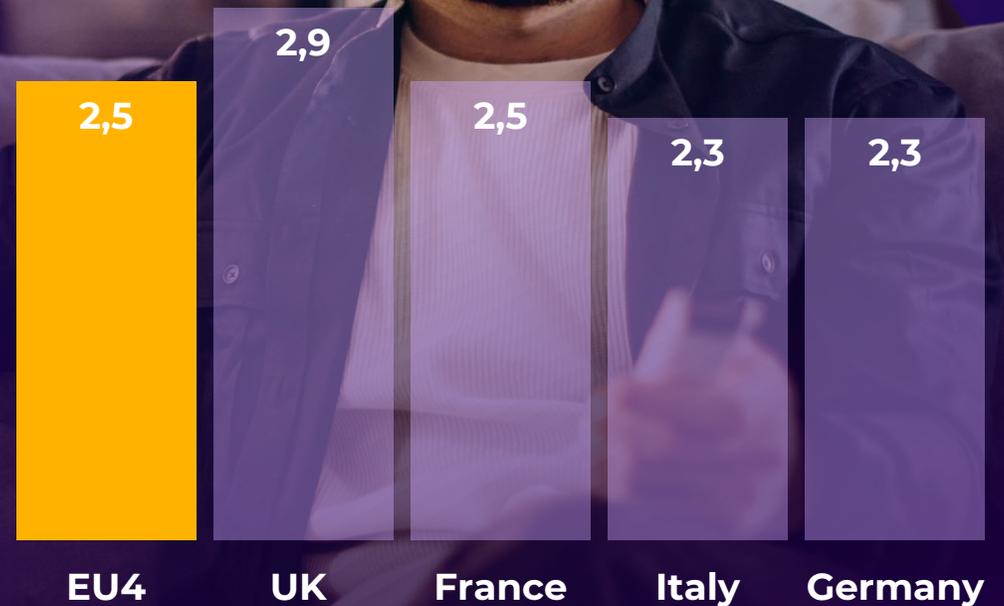
EUR Would use
AVOD in addition
to SVOD



EUR Already use
AVOD regularly



ON TOP OF SVOD EU4 VIEWERS USE +2.5 VOD PLATFORMS



BVOD IS WIDELY ACCESSED VIA CTV

AVOD STARTING TO GAIN TRACTION



18-24Y.O

	56,5%	72%
	47,0%	67%
	43,6%	44%
	35,2%	37%
	24,2%	14%
	16,1%	22%
	4,7%	10%
	3,7%	6%
	3,1%	5%



18-24Y.O

	64,5%	64%
	48,7%	51%
	48,6%	47%
	32,2%	21%
	28,6%	23%
	19,7%	30%
	11,1%	8%
	10,0%	13%
	8,6%	7%
	8,5%	6%
	4,9%	6%



18-24Y.O

	43,2%	48%
	39,3%	51%
	26,1%	30%
	21,2%	18%
	16,9%	22%
	16,3%	18%
	14,3%	14%
	10,3%	15%
	8,8%	15%
	7,2%	11%
	6,2%	9%
	3,5%	3%



18-24Y.O

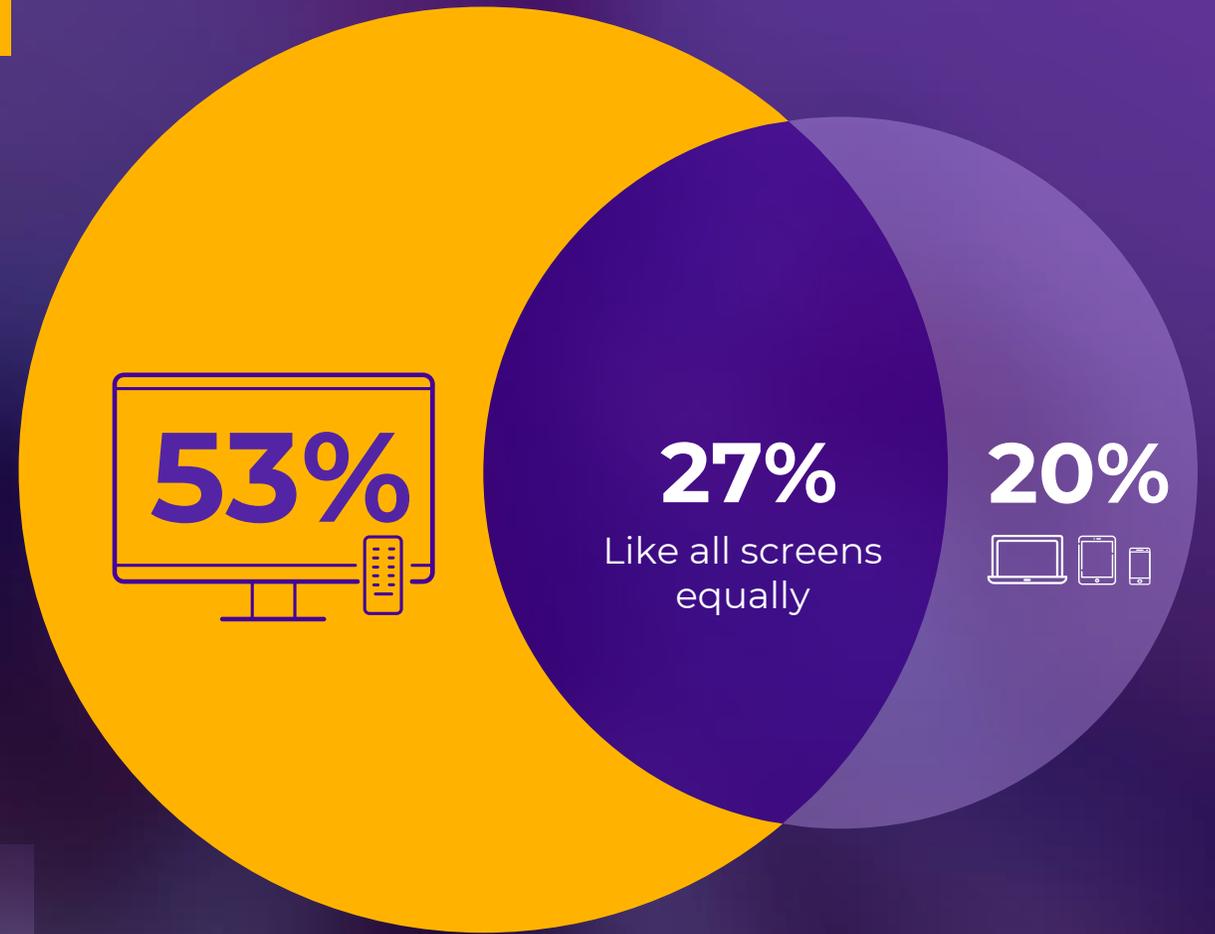
	46,0%	34%
	29,8%	17%
	21,7%	22%
	20,9%	15%
	18,3%	26%
	17,2%	9%
	15,8%	15%
	10,2%	7%
	9,6%	10%
	9,2%	6%
	7,4%	4%
	7,2%	2%
	4,9%	4%
	4,3%	6%
	3,4%	2%
	3,2%	3%

53% OF EU4 VIEWERSHIP PREFER TO WATCH VIDEO ON THEIR CTV

VS. OTHER DEVICES



 JUMPING TO **57%** ON **>35 Y.O**



CTV IS THE PREFERRED DEVICE

BECAUSE IT IS SOCIAL AND PROVIDES THE BEST EXPERIENCE



I can enjoy a very qualitative user experience to watch videos (large screen, greater sound, better user interface and content choice)

EU4

55%



I can watch videos with my family or friends and share the viewing experience

EU4

44%



I can do multi-tasking with my phone while watching tv

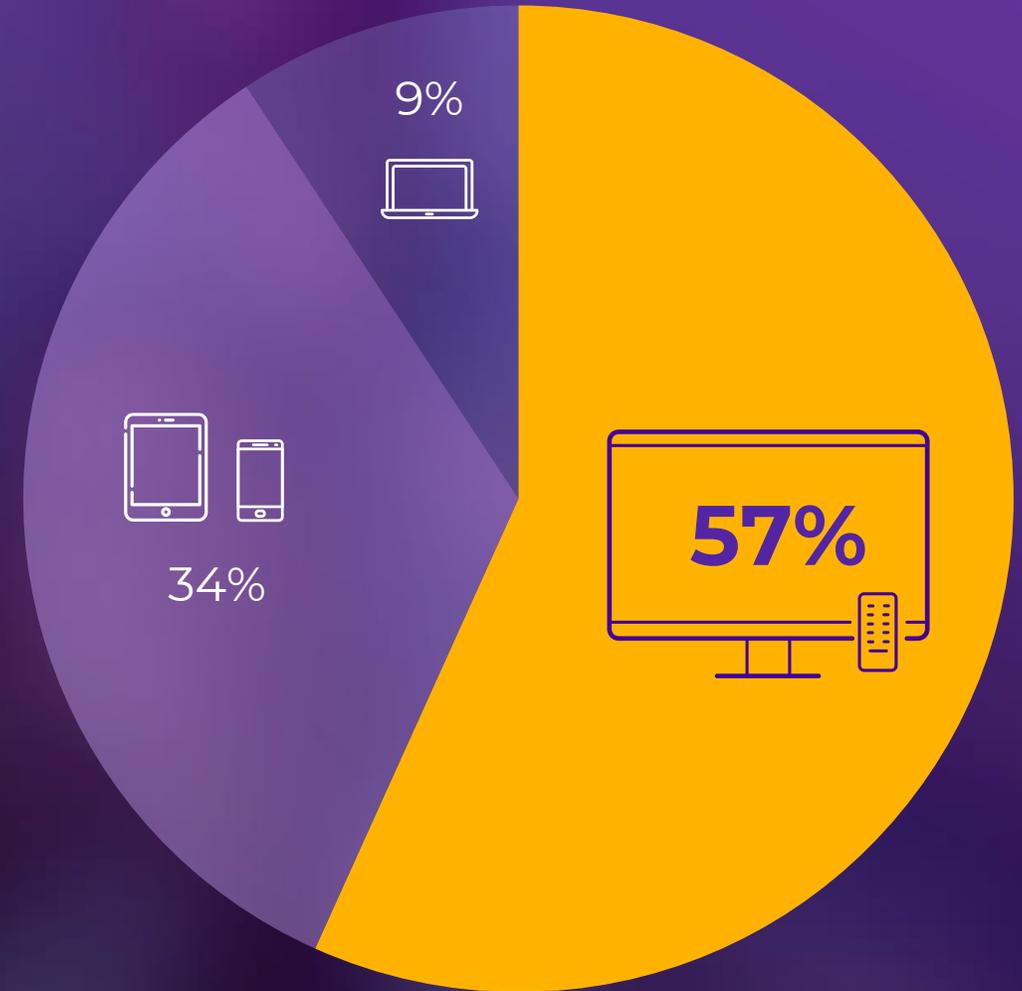
EU4

36%

CTV BOOST KPIs:

VIEWERS PAY MORE ATTENTION TO ADS ON CTV

VS. OTHER DEVICES



AD ENGAGEMENT

VIEWERS SAY ADS

ARE LESS INTRUSIVE

ON CTV

VS. OTHER DEVICES



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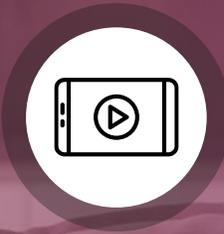


MILLENNIALS 15-24 INSIGHTS & PREFERENCES



Use more on-demand platforms (+1)

Millennials are the main cord-cutters, primarily watching video content, on-demand



Watch video like digital nomads

Millennials are true digital nomads and like to watch videos on their mobile, anytime, anywhere



Prefer targeted advertising

Millennials prefer to be exposed to targeted ads related to their hobbies and center of interests



Multitask while watching TV

Millennials widely use their mobile as second-screen while watching TV

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THE RAPID RISE OF AVOD & CONNECTED TV

VIEWERS INSIGHTS

2021

More Insights ? Contact eumarketing@freewheel.com

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