



WHY CTV REIGNS SUPREME IN THE ATTENTION ECONOMY: PART 2

SHOWHEROES

KINESSO

INTRODUCTION

Since our last study in 2022, Connected TV has continued to grow and become the predominant way many audiences consume TV content.

With this growth, we're seeing an evolution in user behaviour that is crucial to understand.

Why do users choose CTV? When do they watch CTV and what factors influence their decision to choose this screen? These are some of the questions that ShowHeroes and KINESSO are looking to answer.



Sarah Lewis
Global Director CTV
ShowHeroes

OVER-THE-TOP CONTENT

Device-independent linear or non-linear video/audio content
Live streams or media libraries
Distributed directly to viewers over the Internet



**Desktop, Mobile,
Tablets**



**Smart TVs, Streaming devices,
Gaming consoles**

CONNECTED TV

Specific TV-screen-like devices within the group of OTT-compatible hardware

Smart TV, gaming console,
set top box

METHODOLOGY

ShowHeroes and KINESSO teamed up to conduct this study into CTV audience behaviour.

The research was divided into two elements. The first was a survey aimed at diving into user behaviour and attitudes when it comes to CTV vs linear TV watching. We conducted this survey across 6 key markets in Europe.

The second part of the study used a simulated CTV environment and eye-tracking technology to gain deeper insight into ad awareness, message recall and likeability of ads on a CTV screen.

- Markets:** Germany, UK, France, Netherlands, Belgium, Spain
- Sample size:** 1,000 respondents
- Method:** Questionnaire + simulated CTV environment with eye-tracking

HAVE A CLOSER LOOK TO THE CONTENT



Content provided by



METHODOLOGY

PHASE 1: QUESTIONNAIRE

We needed to gain updated insights into the **ATTITUDES** and **BEHAVIORS** of CTV viewers through an online questionnaire in six countries in Europe, with sample sizes varying between 100 and 210 per country.

Germany	n=102	Netherlands	n=104
UK	n=208	Belgium	n=101
France	n=207	Spain	n=102

The questionnaire covered the following topics:

- CTV/linear TV viewing behavior
- Attitudes towards CTV
- Advertisements on CTV

Gender and age diversity in sampling

	Germany	UK	France	Netherlands	Belgium	Spain
Male	56%	49%	43%	53%	49%	51%
Female	44%	51%	57%	47%	51%	49%
18-34	7%	27%	12%	17%	23%	22%
35-49	23%	24%	25%	19%	25%	29%
50-64	41%	25%	33%	40%	30%	27%
65+	29%	25%	29%	23%	23%	22%

METHODOLOGY

PHASE 2: EYE-TRACKING

Within the questionnaire respondents were asked to watch a video, which was tracked using eye tracking software. After watching the video the participants were asked questions about the content itself, their ad awareness, message recall and likeability of the ads.

To create a CTV environment, respondents could choose out of two content pieces, provided by LoveTV.



The content started with a Smart TV homescreen followed by the content piece. Halfway through the video three mid-roll adverts were shown related to CPG, Retail and Automotive.

After the video, the questionnaire resumed

ANALYSIS

How much attention do advertisements receive within a simulated CTV environment?

Do advertisements that are more related to the content resonate better than a non-related advertisement?

We showed 3 ads, of which one is related to the content they see. Do these advertisements perform better within relatable content?

Films & stars > Autos

High Energy

Eating our way to extinction > EV (electrical vehicle)

Offering a solution to the problem

GLOSSARY

CTV

Connected TV

Streaming content to a TV set connected to the internet via an open internet connection.

OTT

Over the Top

Streaming content via an open internet connection to any device.

Heatmap

Distribution of attention / attention density.

Reach

% of people who noticed the area at least briefly

Linear TV

Traditional broadcast TV.

Visits

Number of times the area was looked at

Dwelltime

Average duration (in seconds) the participants' gaze rested on the area

KEY FINDINGS

86%

**of TV viewers watch CTV
and CTV viewers watch more
hours of TV per day than linear viewers**

The younger audience is leading the charge in the switch to CTV

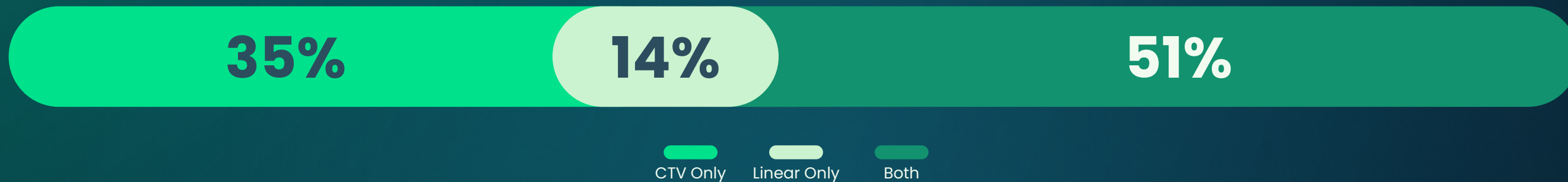
Enhanced CTV ads with animations on screen proved popular with viewers

Co-viewing is a consistent viewer behaviour for all TV viewing

The most popular OTT screen is CTV

CONNECTED TV CONTINUES TO GROW IN POPULARITY ACROSS EUROPE

Viewing behaviour



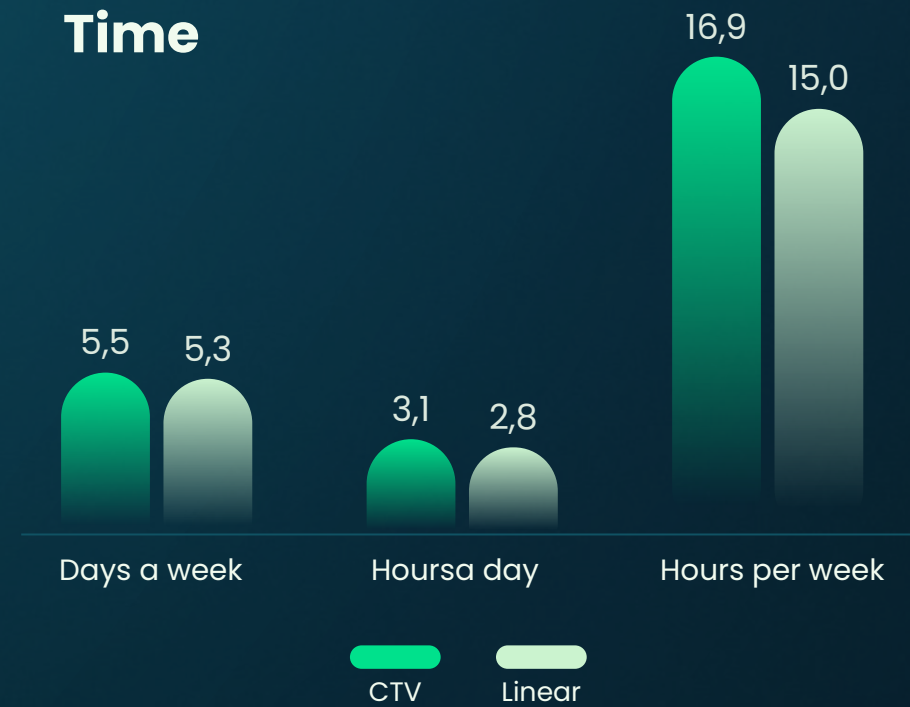
86%
of viewers now watch CTV.

This is **6%**
up from 2022.

Hours per day of TV watching is steady across linear and CTV which shows that we still consume just as much TV content – what’s changing is how we consume it.

Just 14% of users watch exclusively linear TV, so it’s clear that cord-cutting or cord-shaving is prevalent in all markets.

Time



Most of the non-CTV viewers are considering

CTV

With only

17%

excluding this option. The main reason for this is not owning a smart TV and the costs of getting one.

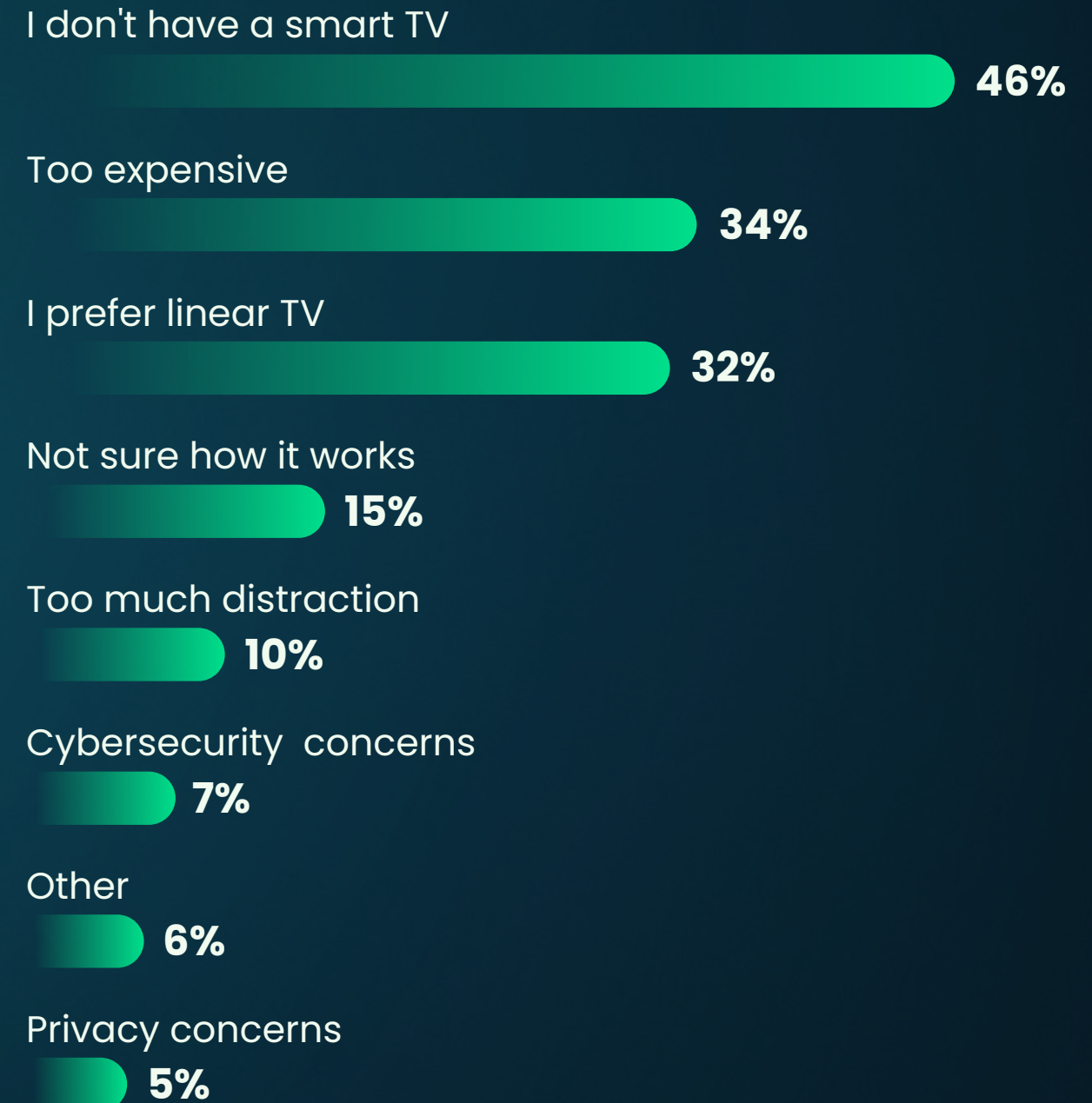
With all leading TV manufacturers now focusing on producing smart TV sets, the % of users who don't have access to a smart TV is lessening with every year. Cost-prohibitive SVOD platforms have also shown to be an inhibitor for people switching to CTV, however with the majority of apps now including an ad-supported cheap or free service this cost is significantly reducing.

Considering CTV



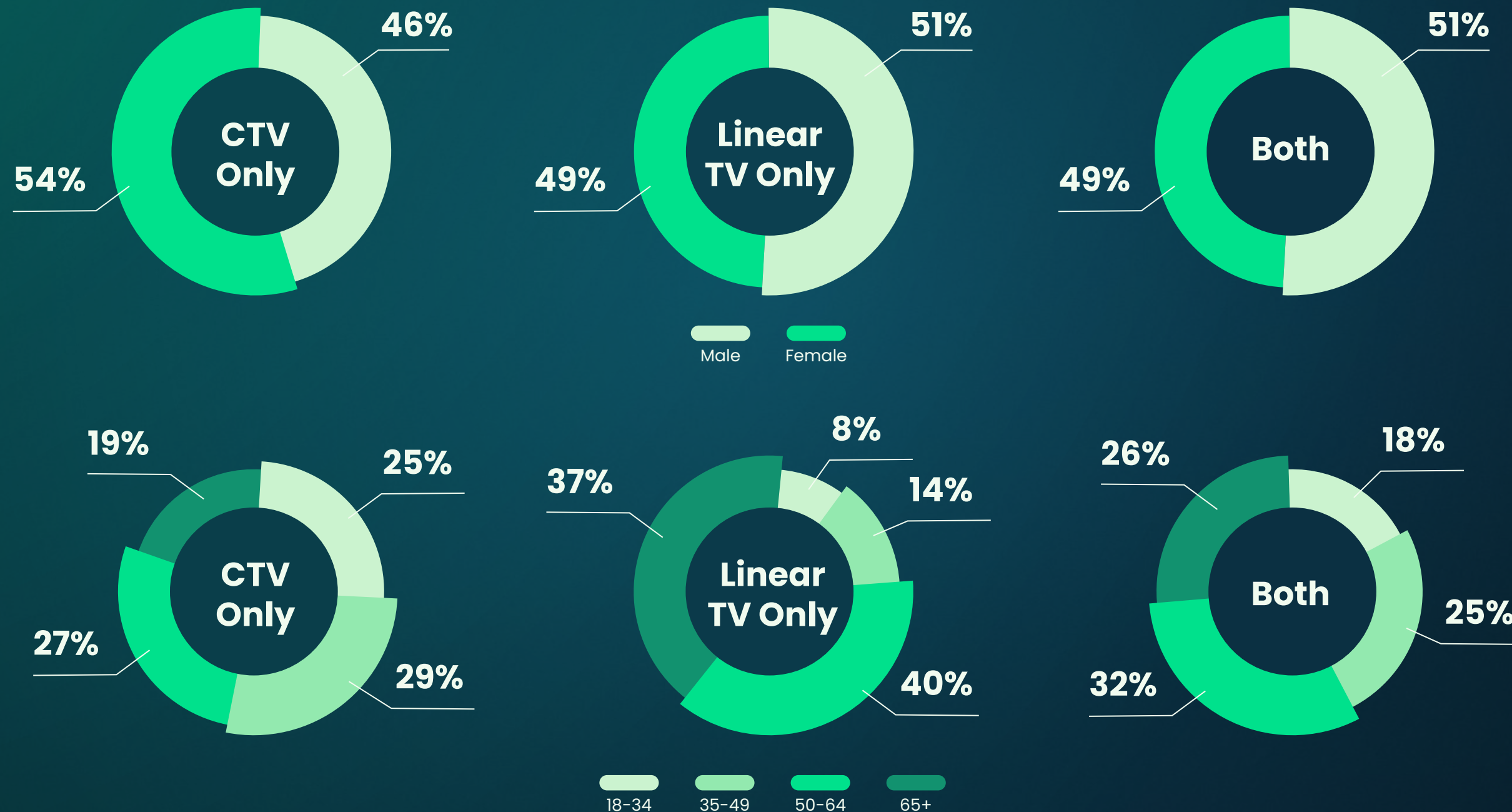
Yes Maybe No

Reasons for no CTV

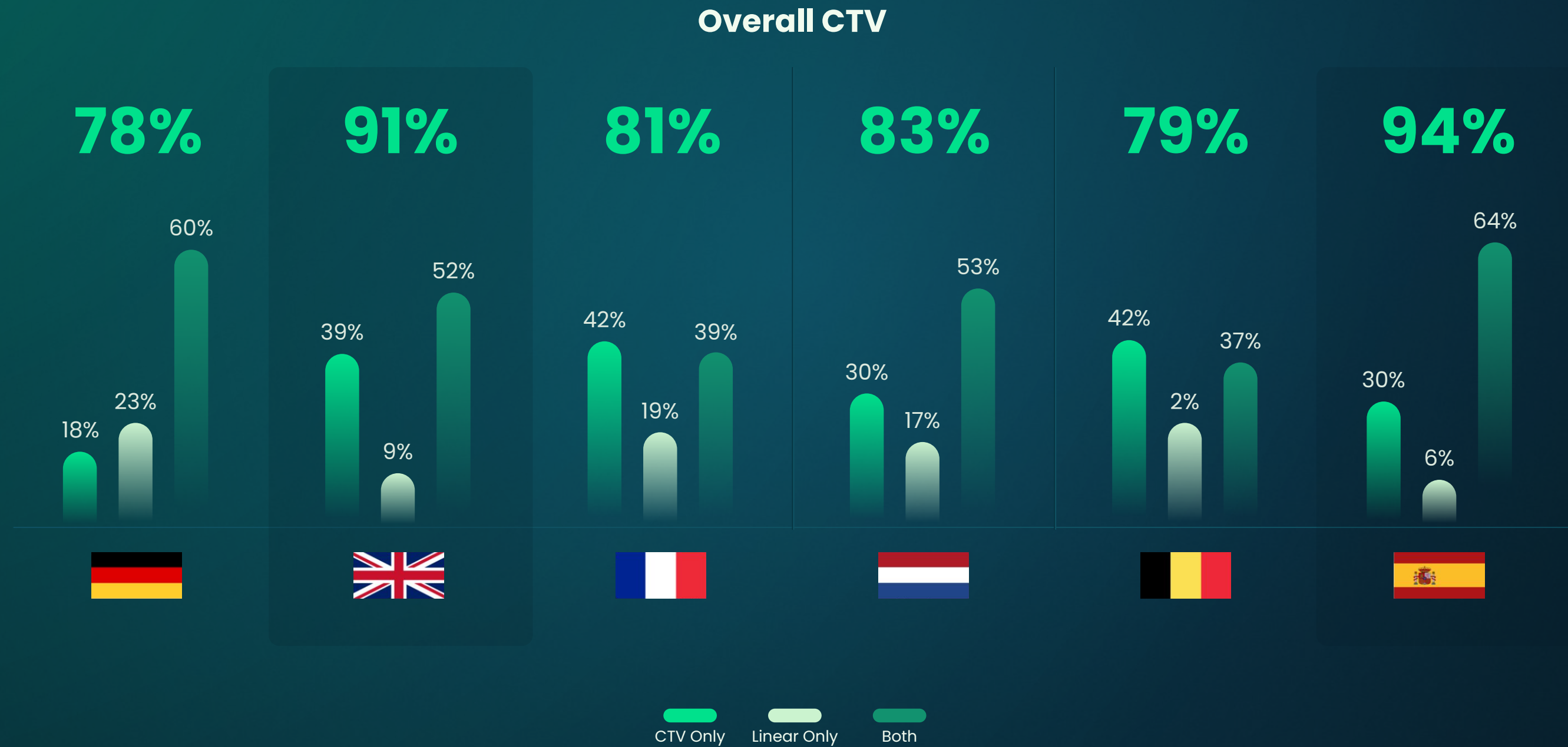


AUDIENCE DEMOGRAPHICS

Gen Z and Millennials are clearly heavy CTV users, with more than 50% of them being exclusive watchers, while Baby Boomers remain loyal to linear TV.



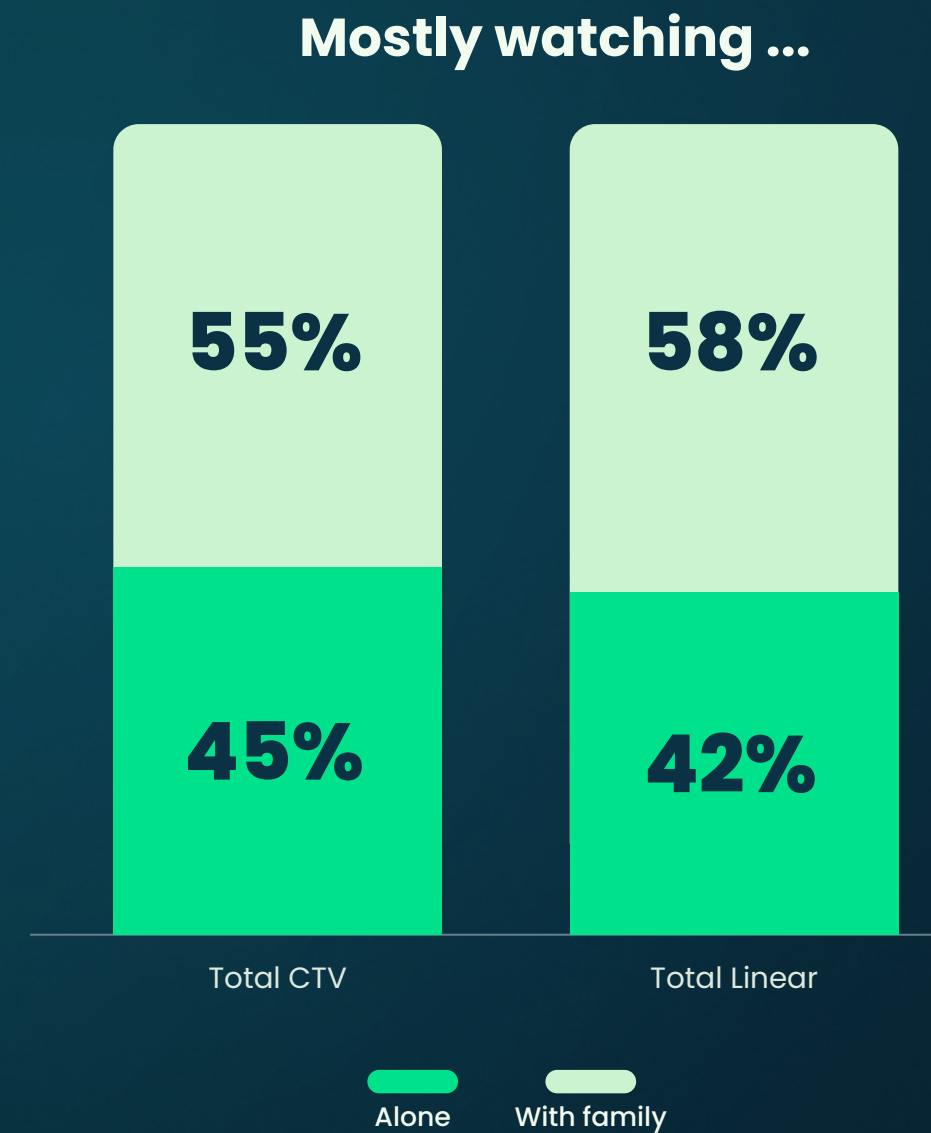
SPAIN AND THE UK HAVE THE HIGHEST AMOUNT OF OVERALL CTV VIEWING



TV IS INHERENTLY A CO-VIEWING EXPERIENCE

Both CTV and Linear are watched with others

More than half of users watch with family and friends. This is a completely different viewing experience to personal devices like mobiles and desktop and also reflects the lean-back, shared viewing experience that CTV is master of.



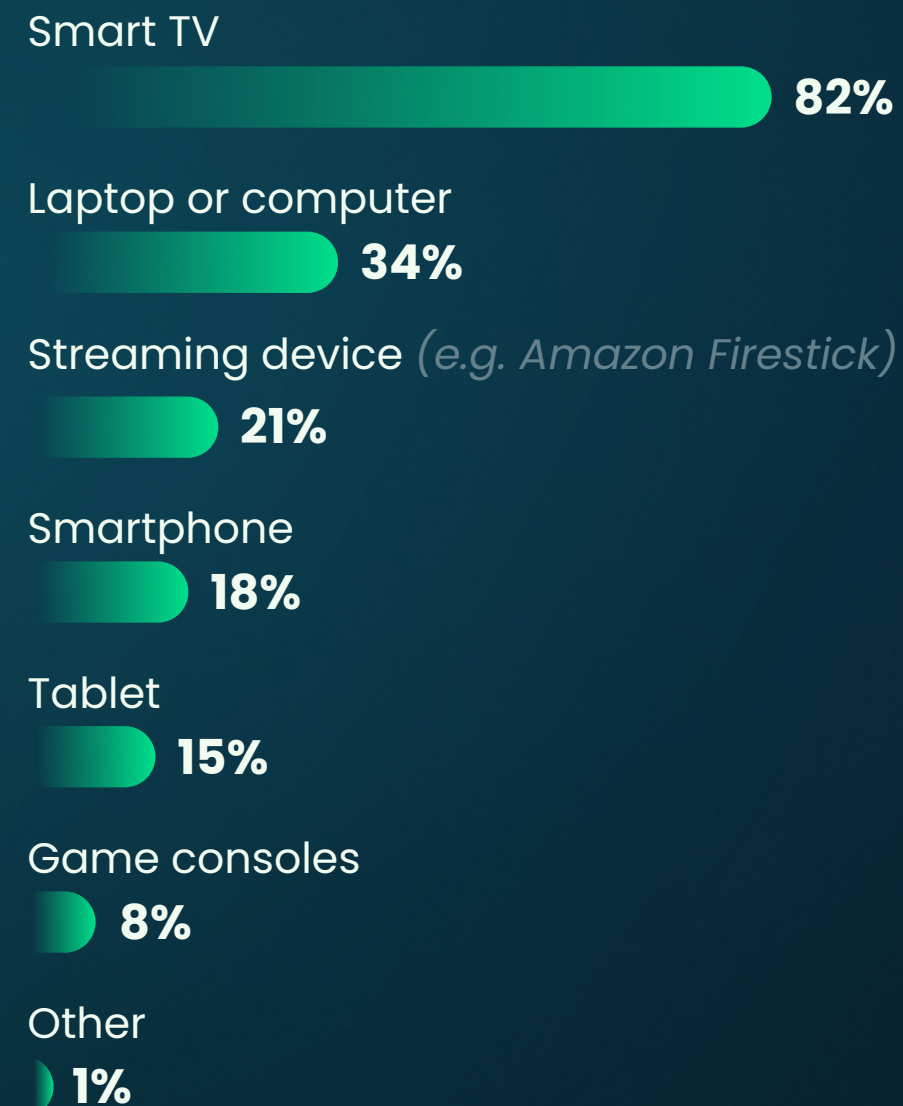
OTT ACROSS ALL SCREENS IS POPULAR BUT SMART TVS COME OUT ON TOP

Smart TVs are becoming a key device in people's homes. With the technology not only becoming more sophisticated, but also more user friendly, opening up new audiences to OTT who may have previously resisted.

Smart TVs are becoming [more affordable](#), making them accessible to a broader range of consumers and are often becoming an extremely important tool for content discoverability.

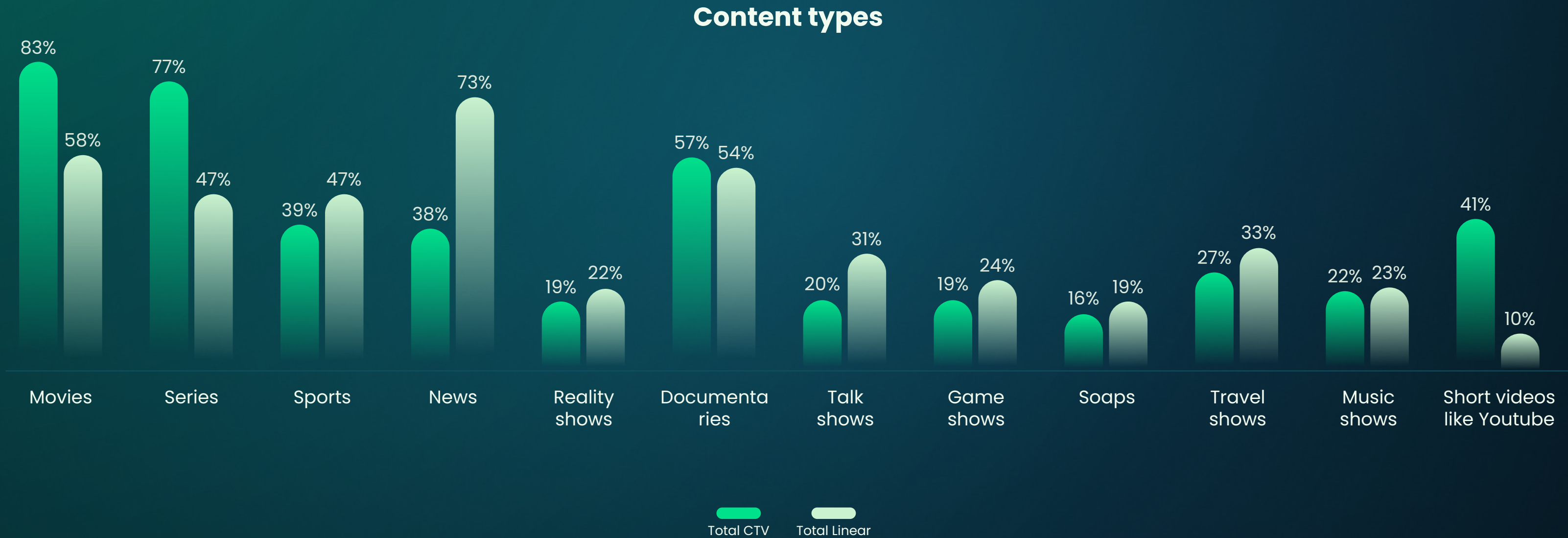
It is estimated that by 2025, [over 90%](#) of all new TVs produced will be smart TVs, reflecting their growing dominance in the market

Devices used for watching OOT



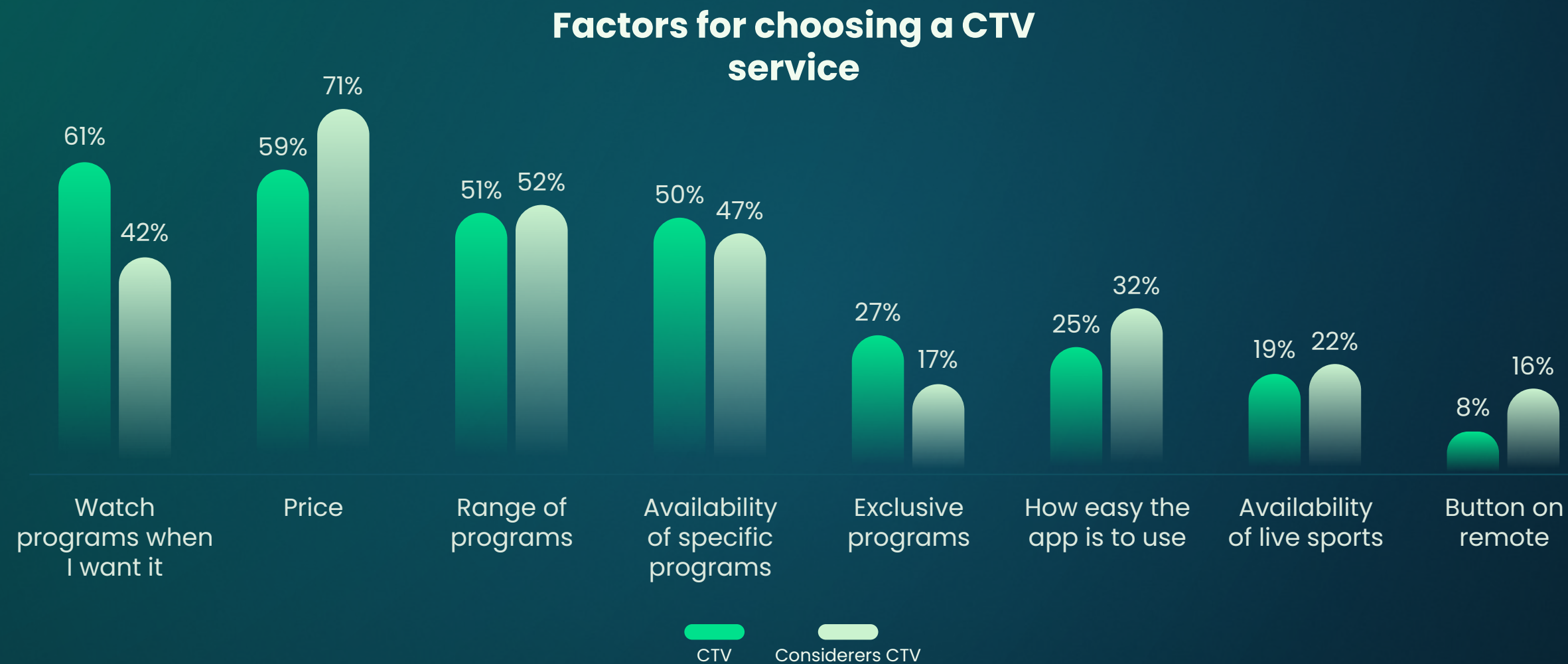
CTV AND LINEAR VIEWERS WATCH DIFFERENT TYPES OF CONTENT

Movies and TV Series are the highest watched content types on CTV whereas News comes out top for linear TV



CONTENT IS STILL KING

Availability of programming is a key driver when users are choosing a CTV service



In Belgium people find watching when they want more important



Price is less important in the Netherlands

The range of programs is more important in the Netherlands.

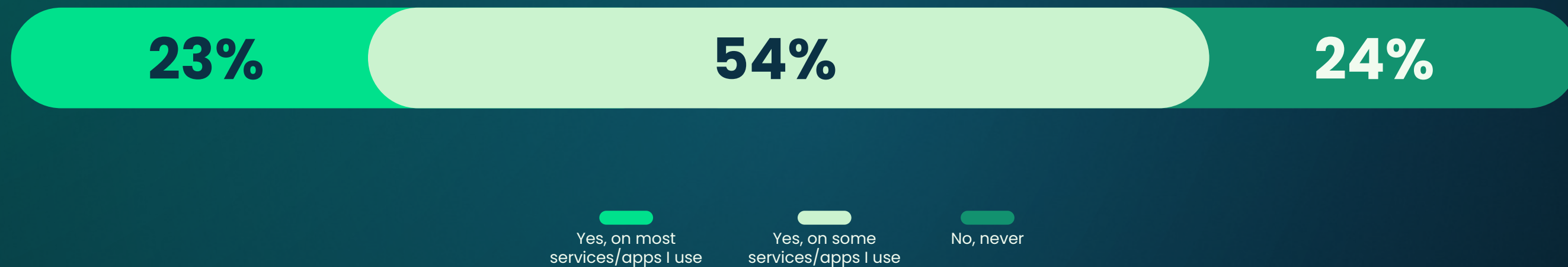


Exclusivity is an important aspect for over one third of users (37%) in Spain.

AVOD IS GROWING

77% of CTV users see advertising on at least some of the services/apps that they use

Sees advertisements CTV



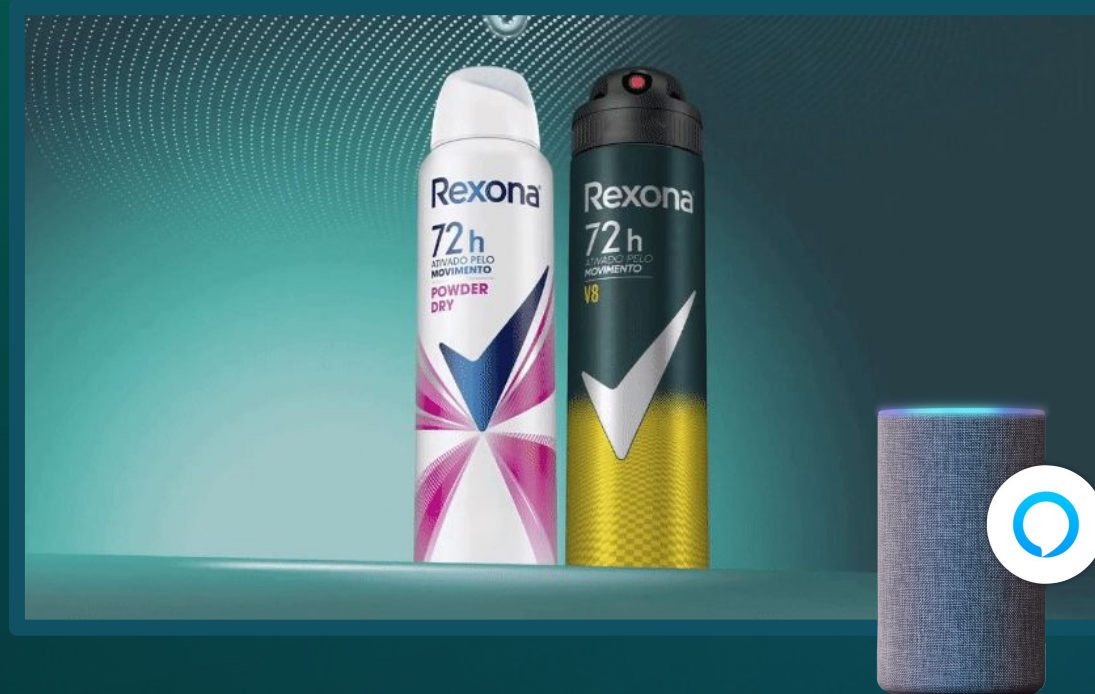
In the UK 90% of the CTV viewers sees advertisements



In the Netherlands the majority of viewers are using CTV services with ads (63%)

ENHANCED ADVERTISING

CTV has opened the door for enhanced creativity and interactivity within TV advertising. Participants were shown three different creative ad formats and asked which they preferred.



VOICE COMMAND

CTV Ad with voice command that works with Alexa smart speaker



CUSTOM ANIMATIONS

CTV Ad with animated overlay



QR CODE

CTV Ad with scannable QR code

CTV VIEWERS FEEL POSITIVELY ABOUT ENHANCED ADS

USERS PREFER CREATIVE ADS

Participants were shown three different creative ad formats and asked which they prefer.

33%

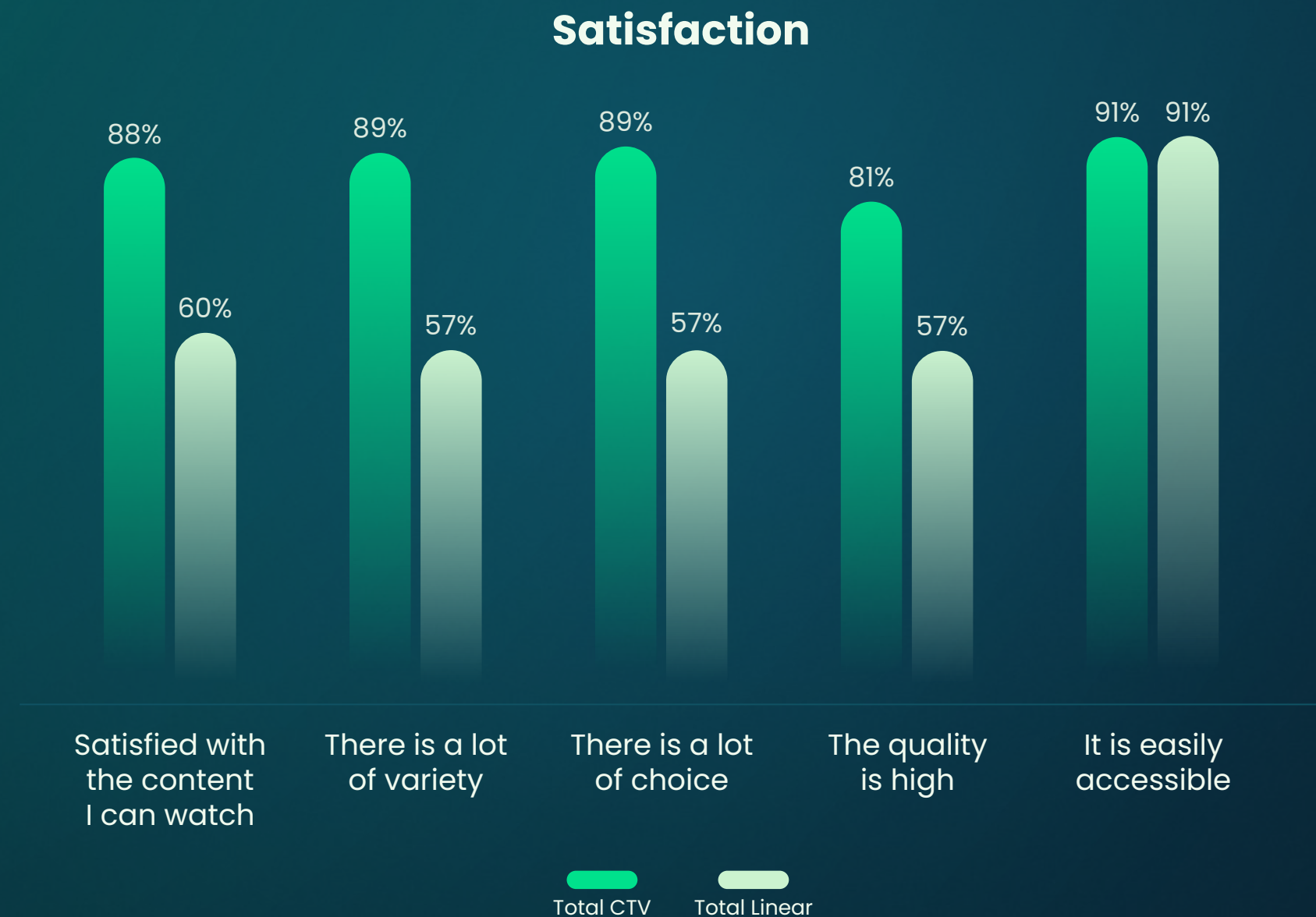
of CTV viewers felt most positively when seeing custom animations included in the ad vs any other formats

A quarter of viewers that have seen ads on CTV have searched for a product or visited a product website after seeing a CTV ad.

Including interactions such as Voice commands or QR codes makes this transition even easier for the user.

CTV USERS ARE MORE SATISFIED WITH THEIR VIEWING EXPERIENCE...

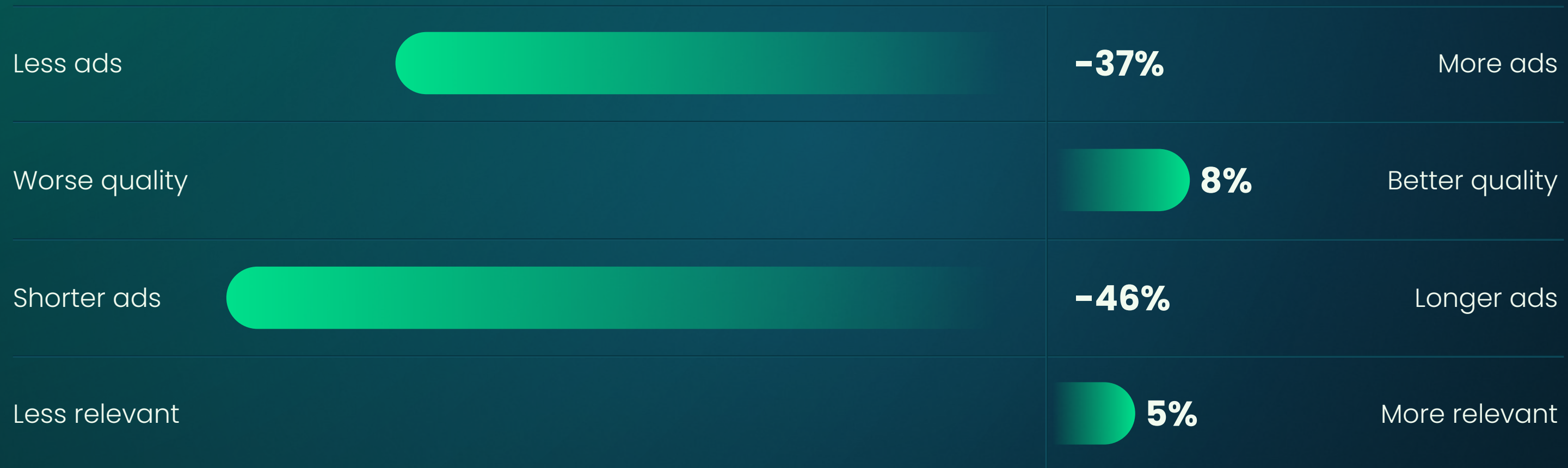
CTV offers more choice, variety and better quality than linear



...AS WELL AS THEIR ADVERTISING EXPERIENCE

CTV viewers find there are fewer and shorter ads on CTV and view the ads they do see as better quality and more relevant

Advertisement CTV compared to linear TV

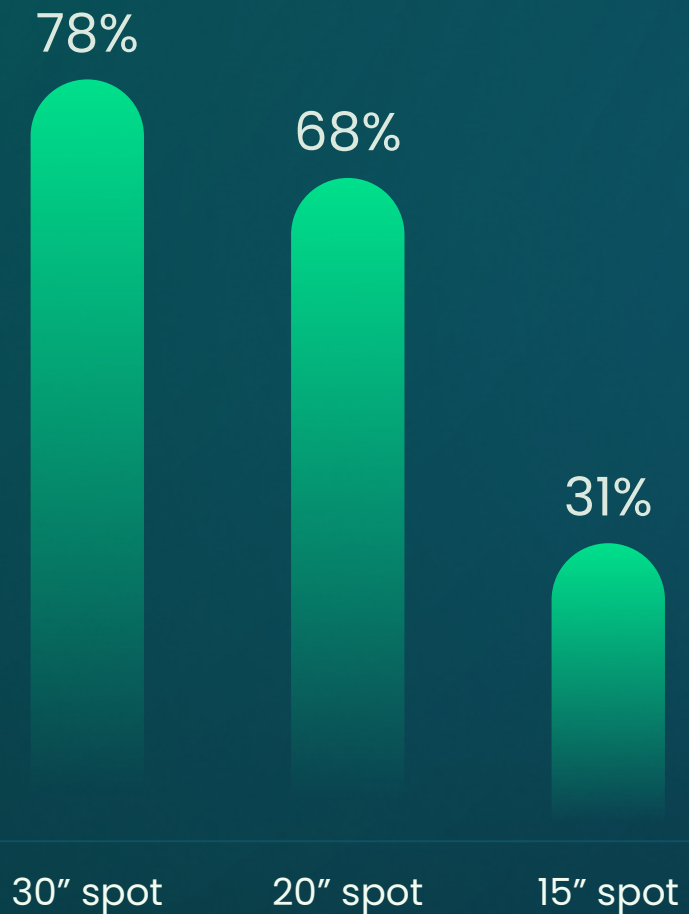


% shown is percentage that evaluated CTV higher minus the percentage of people that evaluated CTV lower.
 E.g. CTV frequency ads: 'more ads' 10%, 'less ads' 47% (10%-47%= -37%)

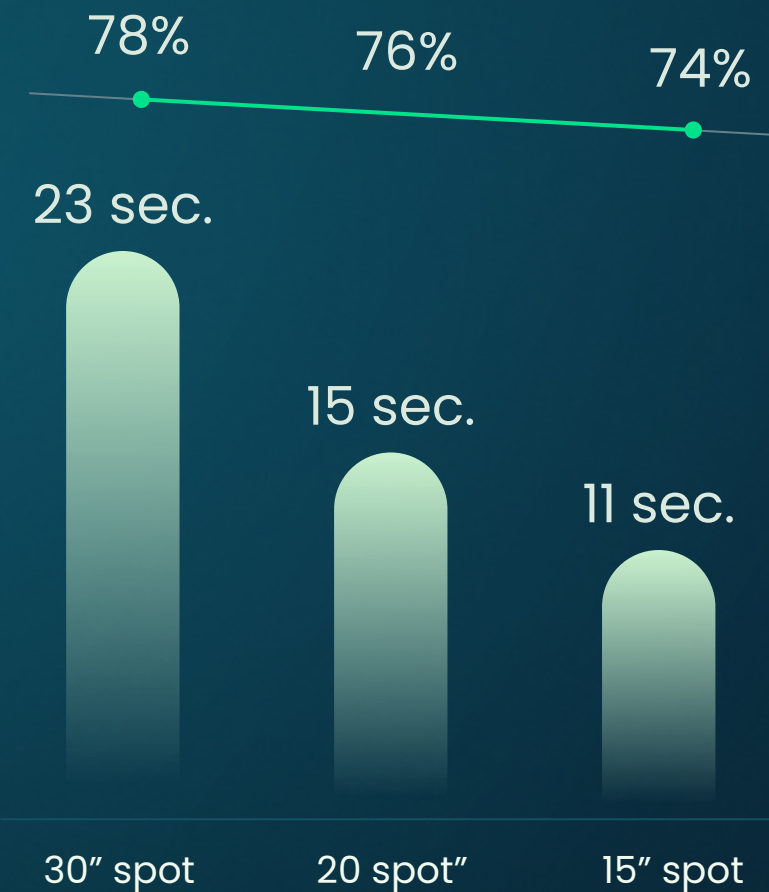
AD SPOT LENGTH HAS AN EFFECT ON ATTENTION

The traditional 30 second spot length proved to have the highest 'dwelltime' as well as the highest recall

Advertisement recall



Dwelltime share



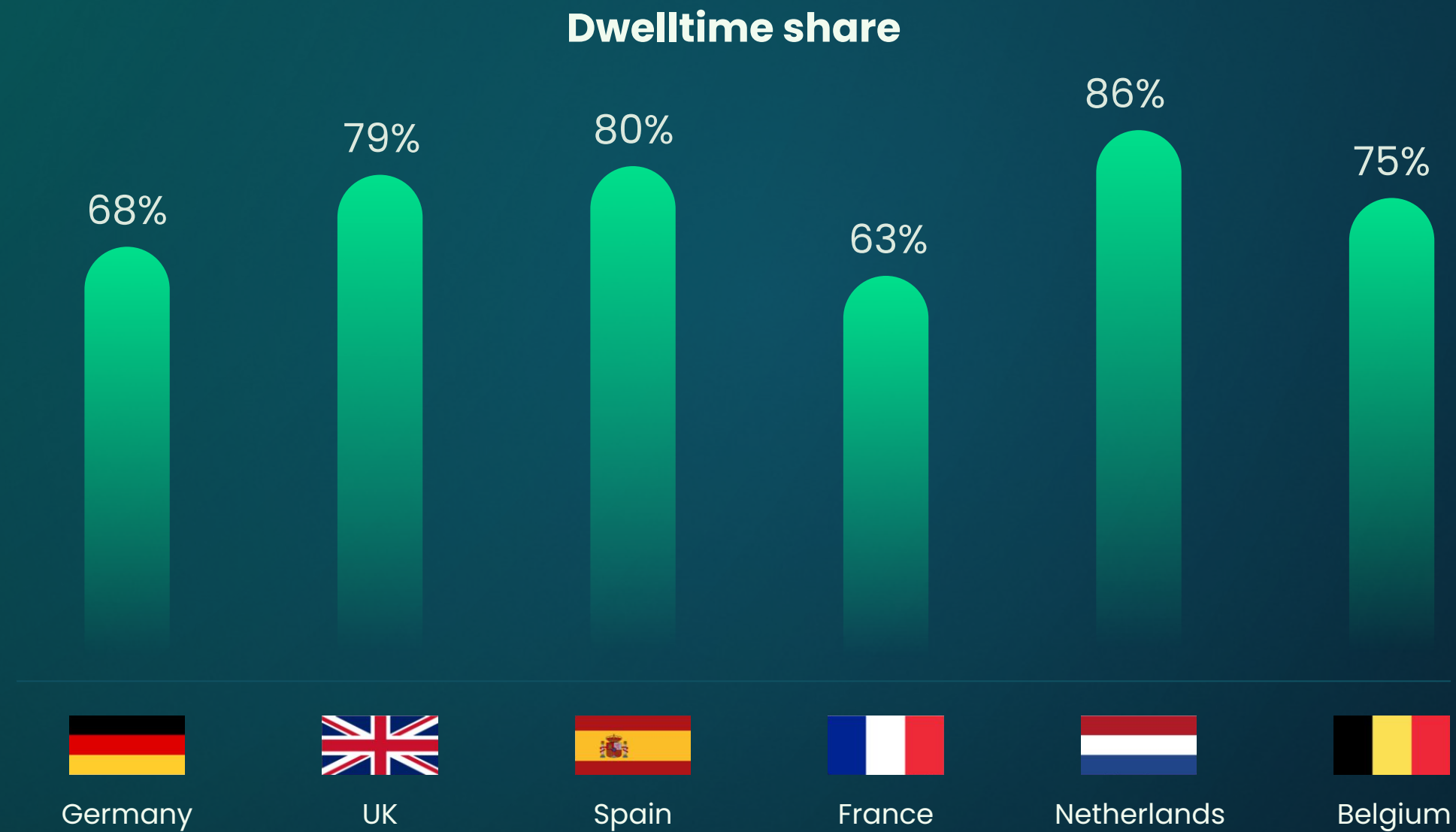
Spontaneous recall

Dwelltime

Dwelltime share

DWELLTIME DIFFERS PER MARKET

With dwelltime in FR and DE lower than other markets this just shows the importance of engaging creative with messaging as relevant to the local market as possible.

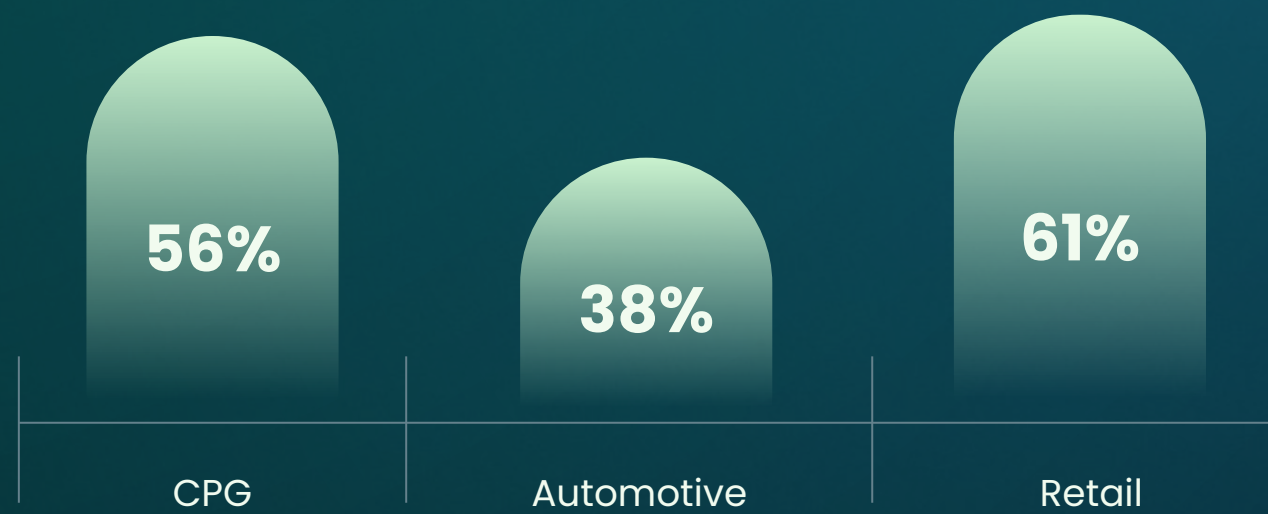


AREAS OF INTEREST: MESSAGE REACH

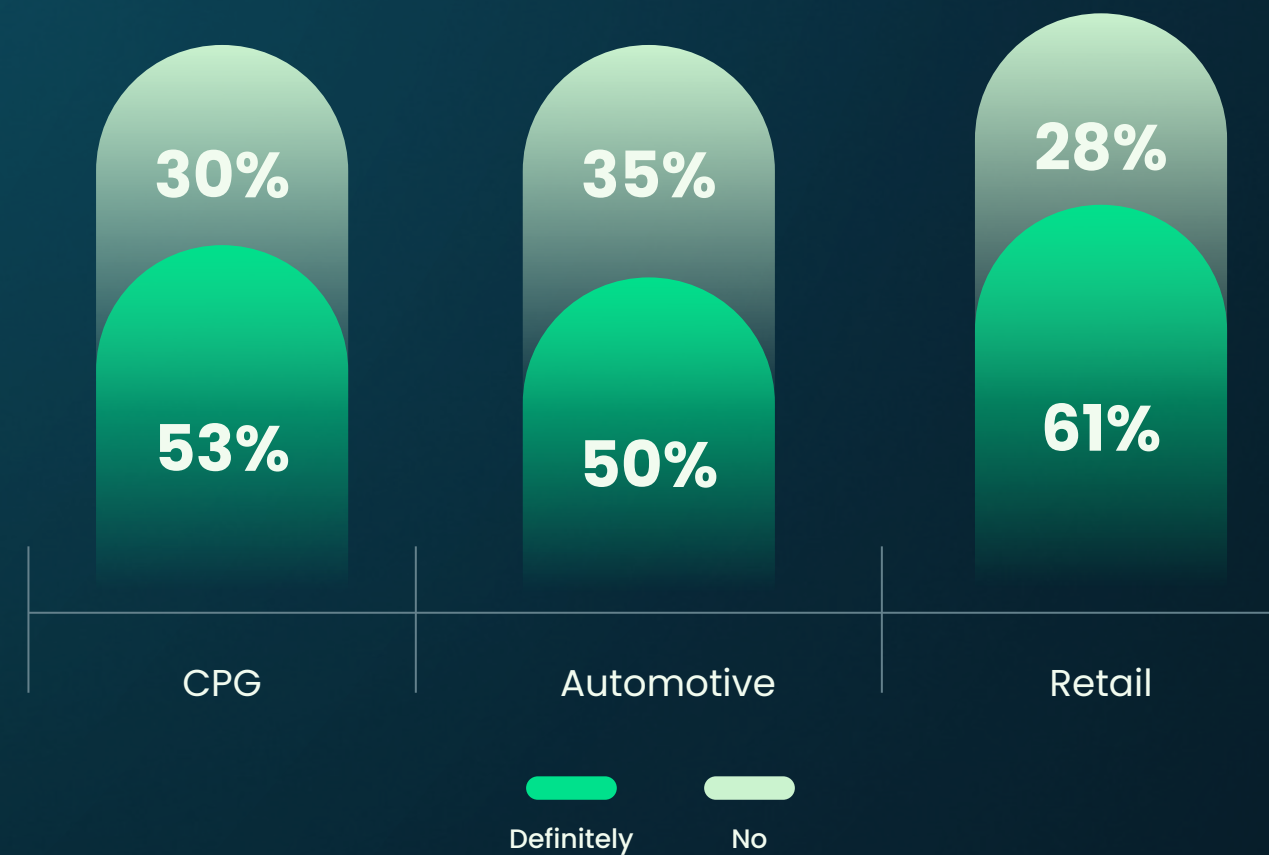
REACH IS IMPORTANT, MESSAGE RECALL IS EVEN MORE

This underscores the power of combining video with sound in ads and reveals a strong potential for integrating voice commands and audio messages.

Reach message
Eye tracking results



Message recall



TEXT DRAWS THE EYE

Having a clear call to action is extremely important as the users' eye was drawn more to the text than the logos included in the advertising. This shows the importance of clear and concise communication with the viewer. The product feature drew less attention than expected, showing the importance of making the product front and centre of the ad.

User Reach of logo, text & product



MARKET DEEP DIVE

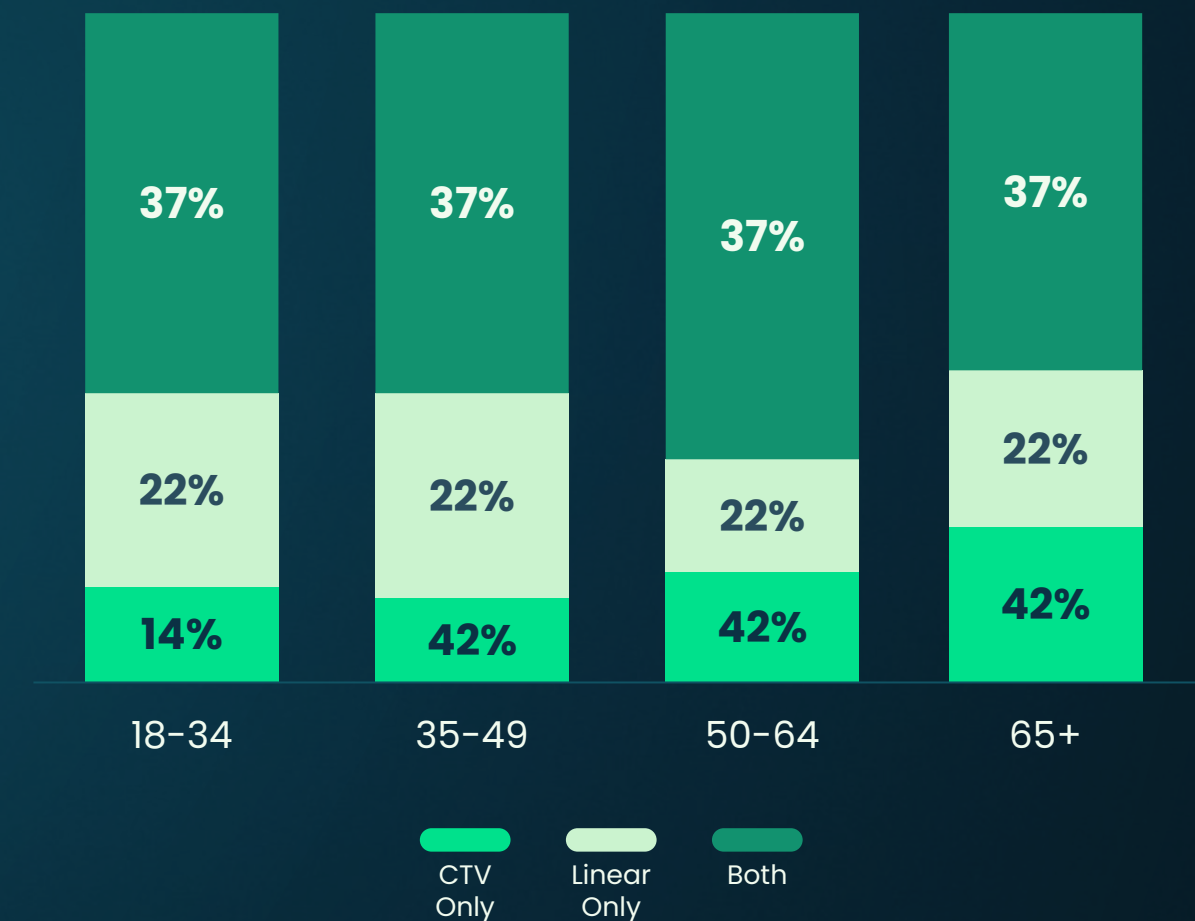
GERMANY

In the German market, Connected TV (CTV) usage stands at an impressive 77%, showcasing widespread adoption. Many viewers enjoy the flexibility of watching both CTV and linear TV, demonstrating their adaptability and the appeal of varied viewing options. A particularly promising trend is the growing interest among younger demographics, presenting an exciting opportunity for further engagement and expansion in this age group.

Despite the enduring appeal of linear TV for movies and documentaries, the growing popularity of CTV in Germany is undeniable. Streaming devices are increasingly embraced, with 33% of the population using only CTV to watch TV content, reflecting a seamless integration of modern technology into everyday viewing habits. This trend highlights a dynamic shift towards more flexible and personalized viewing experiences, showcasing the evolving landscape of entertainment consumption.

Additionally, 68% of CTV viewers encounter advertisements while watching, indicating that ads are a regular part of the CTV experience in Germany. This exposure demonstrates that CTV successfully combines modern viewing with traditional advertising methods, potentially enhancing the relevance and impact of ads. Overall, the German market presents a harmonious blend of the old and the new, showcasing CTV's ability to innovate while maintaining familiar elements that viewers appreciate. viewing habits, with a notable portion of the population still valuing the linear TV experience alongside the convenience of CTV.

Viewing behavior by Age



UNITED KINGDOM

The UK is a leader in the European CTV space, with an impressive 91% of viewers watching some form of CTV. The high engagement with linear TV viewers also highlights that, even in a market with substantial CTV usage, there is still significant potential for further growth and expansion.

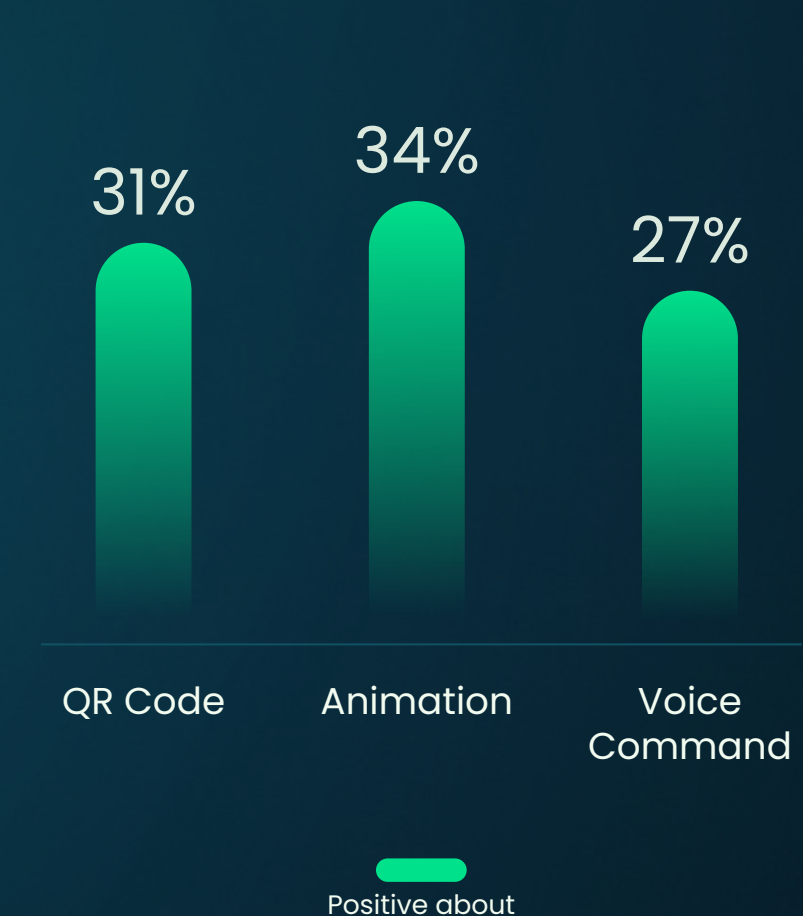
A notable 90% of UK CTV watchers have encountered ads on CTV, illustrating the prevalence and growth of free, ad-supported services. This shift indicates that Subscription Video on Demand (SVOD) is no longer the sole option for CTV users, as more viewers are turning to cost-effective alternatives that still deliver quality content.

Interestingly, UK viewers perceive little difference between the ad experience on CTV and linear TV. This similarity suggests that the length and frequency of advertising on CTV are beginning to mirror the traditional TV ad break experience, which is familiar and comfortable for viewers.

Enhanced creative has gained popularity among UK viewers, with animated advertisements being their preferred format enhancement. This trend highlights the audience's appreciation for engaging and visually appealing ads, indicating a shift towards more dynamic and creative advertising strategies in the CTV space.

Opinion interactive features

UK



FRANCE

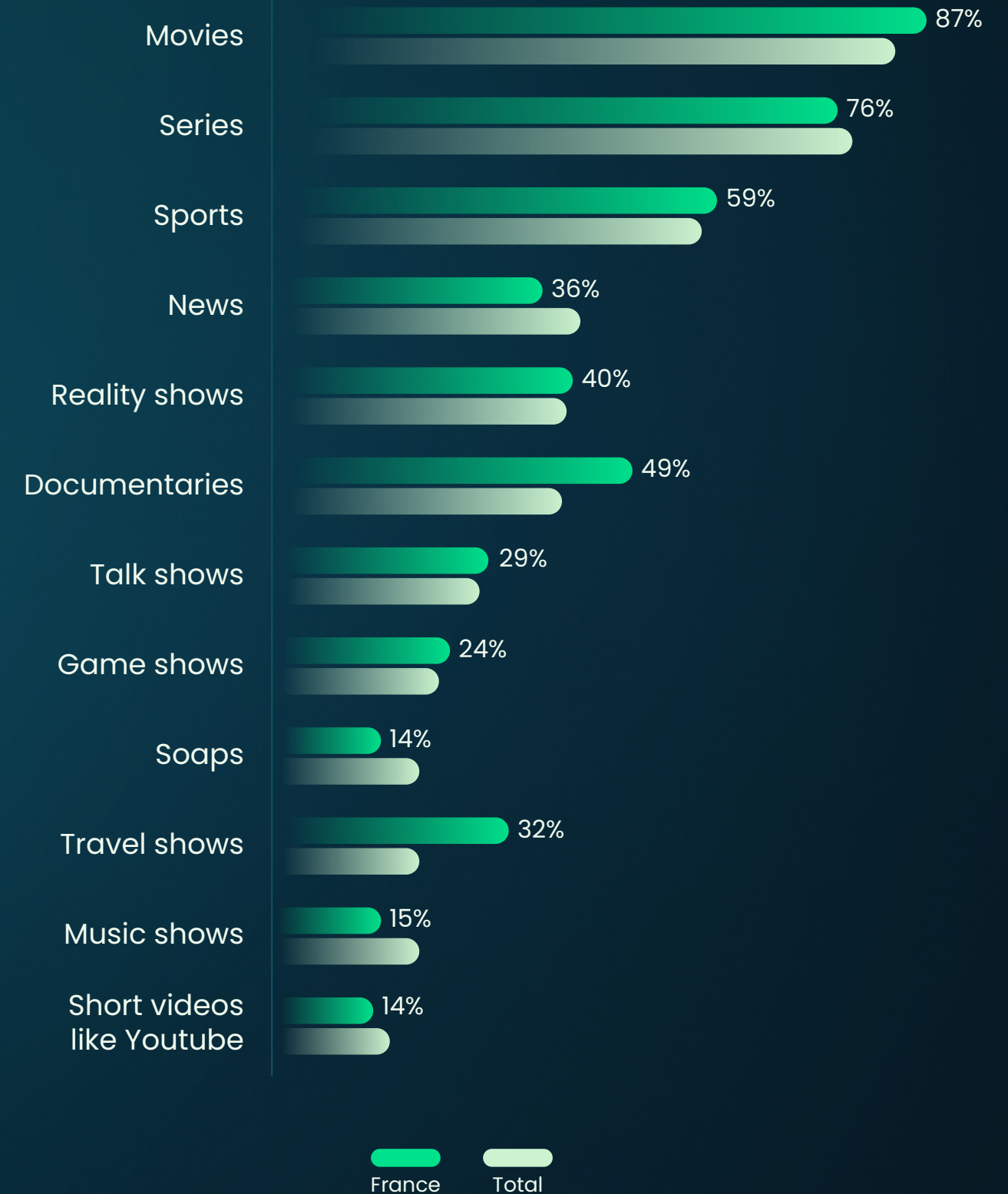
France has been a unique TV market within Europe, with IPTV more prevalent than in other markets. We found strong CTV viewership though, with 81% of respondents stating they were CTV viewers. France also had a higher percentage of male viewers who watch CTV only vs any other market.

On top of that, France also had the lowest linear TV viewership among all the surveyed markets. This means that relying solely on linear TV would result in missing 42% of the French population.

French viewers are tech lovers, with smart TVs being the preference for streaming TV content at 89% of users.

Price is a key driver as to why users have turned to CTV in the market. An influx of free/cheaper ad-supported services is providing the French audience with more viewing options.

Content types CTV France



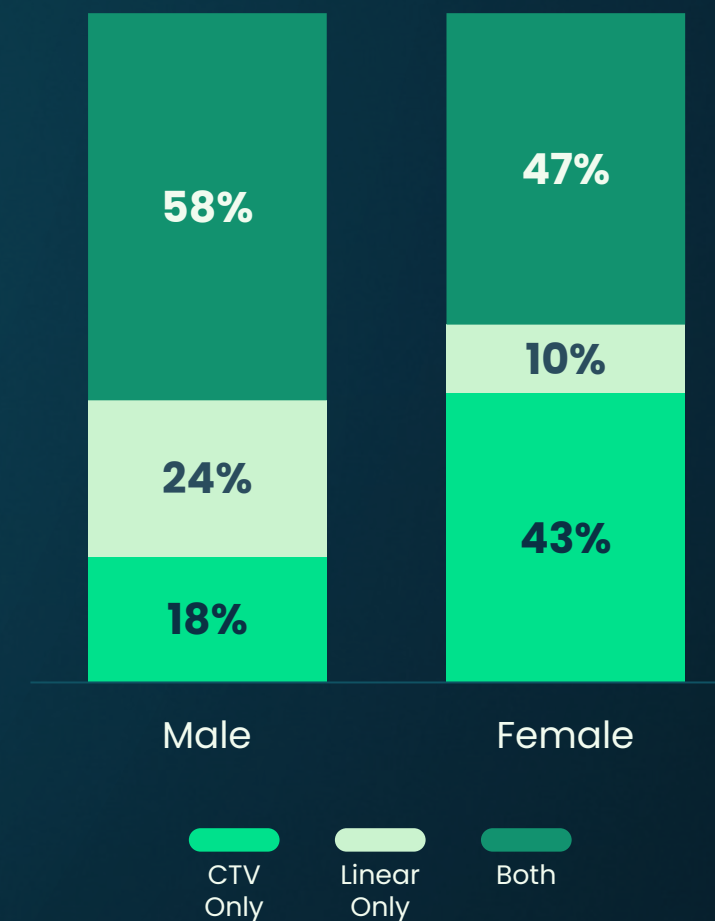
NETHERLANDS

Dutch viewers have a strong preference for CTV, with 83% choosing this platform, and the preference is even more pronounced among females, where the figure rises to 90% vs 76% males.

The primary draw for these viewers is the wide range of programs available, with 72% citing content diversity as their top consideration when selecting a CTV service. Interestingly, while cost is a factor, it ranks lower in importance, with only 48% of viewers considering it a key concern.

The majority of Dutch CTV users are using services with advertising, with 63% of viewers encountering advertisements on at least some of their content. This is lower though than other markets such as the UK, highlighting an opportunity for AVOD services to expand their reach in the Dutch market. Additionally, the current perception of CTV ads is that they are not yet more relevant than those on traditional linear TV, suggesting that while CTV's content is a significant draw, there is still potential to enhance the impact and relevance of its advertising. This is where tools such as contextual targeting will be essential for increasing relevance and therefore in engagement in the advertising.

Viewing behavior
Netherlands



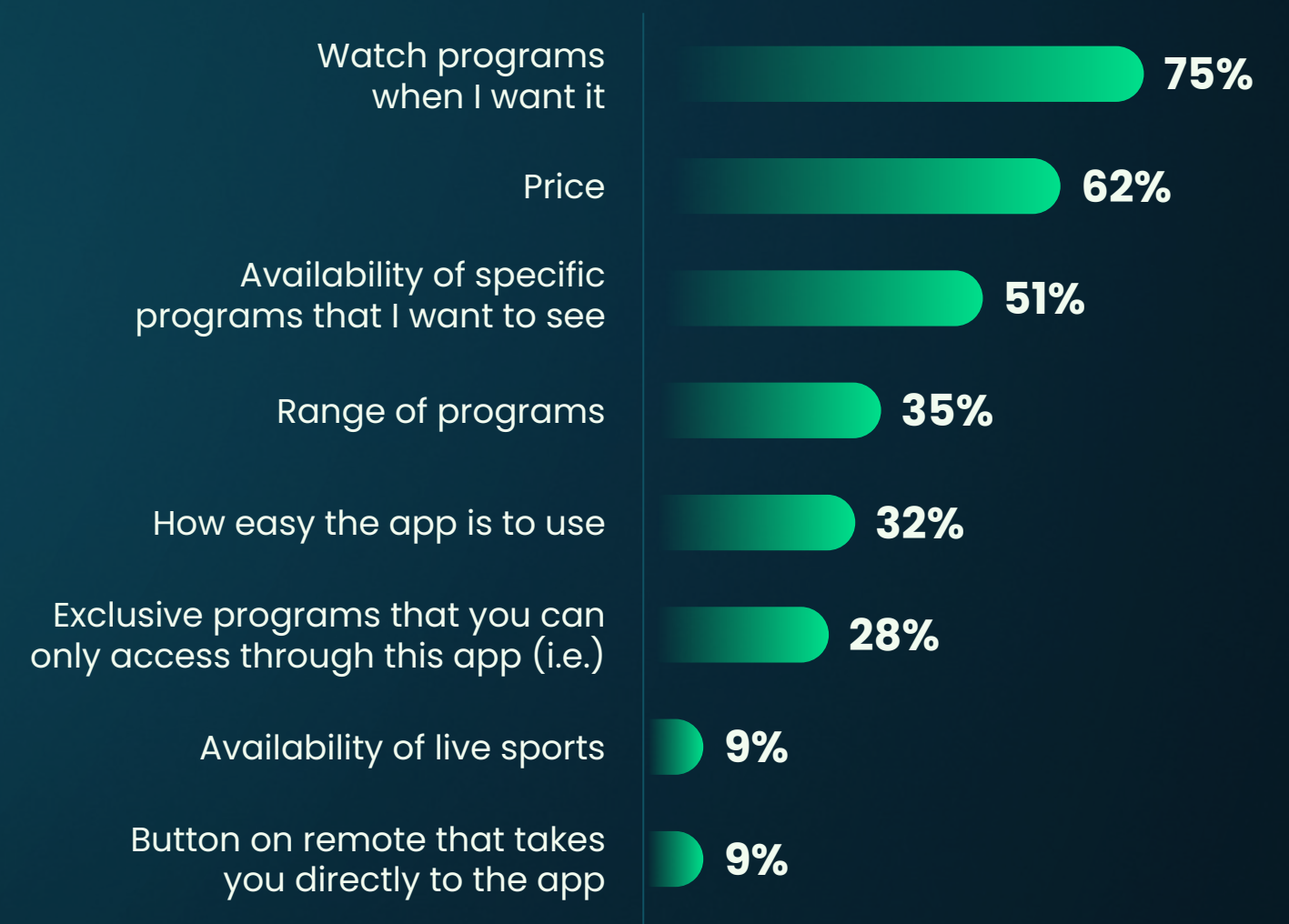
BELGIUM

In Belgium, 78% of viewers prefer CTV, with a clear tendency to stick with either CTV or linear TV, while only 37% engage with both. Belgian viewers typically use fewer devices for streaming OTT content, reflecting a more streamlined and straightforward viewing experience.

The 'on-demand' feature is particularly valued among Belgian CTV watchers, with 75% considering it a crucial aspect of their viewing choices. However, only 35% prioritize the variety of programs available when selecting a CTV service.

Additionally, there is a noticeable preference for free, ad-supported streaming services, favored by 56% of viewers. This trend highlights the emphasis on convenience and cost-effectiveness in Belgium, underlining the importance of accessibility and affordability in the competitive landscape of streaming services.

Factors when choosing CTV service Belgium



SPAIN

Spain has the highest percentage of Connected TV watchers, with an impressive 94% of the population engaging with CTV. Despite this widespread adoption, a significant portion of the population, particularly males, also watch both CTV and linear TV, with 64% using both platforms. This dual consumption pattern underscores the continued relevance of traditional TV even as CTV gains dominance. Many Spaniards enjoy watching CTV with others, with 61% participating in shared viewing experiences, indicating a social dimension to their viewing habits.

When selecting a CTV service, over one-third (37%) of Spanish viewers consider exclusive programs an important factor, reflecting a strong desire for unique and original content. Compared to the UK, where CTV viewership is also high, the percentage of people in Spain who see advertisements is lower, suggesting different levels of ad exposure.

The Spanish audience perceives CTV advertisements more positively, noting their lower frequency and shorter length but appreciating their higher quality and relevance, which enhances the overall viewing experience. This positive perception of ads likely contributes to the overall satisfaction with CTV. In general, people in Spain are more satisfied with CTV and less so with linear TV, highlighting a significant shift in viewing preferences towards modern, flexible, and engaging content delivery methods.

Satisfaction CTV and Linear
Spain



KEY TAKE OUTS

VIEWING BEHAVIOUR

86% of users watch CTV and those who don't are considering it.

Over one third of the audience only watch CTV (and no linear TV), half of the people watch both CTV and linear.

Overall people are more **satisfied with CTV** than with linear TV. With more variety, choice and higher quality.

AD PERCEPTION

The affordability of paid streaming services plays a crucial role in viewers choice of platform. As a result, ad-supported services are increasingly popular, with over three-quarters of CTV viewers watching advertisements.

Compared to linear TV, viewers find advertisements within CTV to be less frequent, shorter, more relevant, and of higher quality. This positive perception enhances the overall viewing experience and highlights the effectiveness of CTV advertising.

RELEVANCE

Relating advertisements to the content, which is increasingly possible within CTV due to semantic targeting, has a positive effect on the perception of the ad.

The eye tracking results also show the importance of the creative:

- Longer ads get more attention, resulting in a higher ad recall
- Combining video and sound maximizes the message reach.

CREATIVE TAKE OUTS FROM EYE TRACKING; WHAT ATTRACTS ATTENTION

Faces attract attention:

Using people attracts attention to the screen but make sure that the product is still prominent to avoid distraction

Moving objects attract attention:

Motion is a clear attention drive, and something as simple as animating the product image can make a difference..

The middle of the screen gets more attention:

Feature your main product in the middle of the screen for maximum impact.

Large objects get more attention:

Highlight your product as much as possible



Our latest connected TV study reinforces the clear trend of recent years: growth, growth, and more growth. There is a clear preference for CTV within OTTs, as well as a strong inclination toward more interactive formats that involve active user participation.

Viewers are tired of seeing the same content repeatedly and desire a more direct communication with the brand and the product. Brands and advertisers must understand that context is a key element that can create a desired and curated brand experience, as opposed to just another ad at the most inopportune moment.

Ilhan Zengin

CEO at ShowHeroes Group



In our recent study focused on understanding Connected TV audience behavior, we aimed to equip brands with the insights needed to navigate the increasingly complex digital advertising landscape. CTV usage and advertising are growing fast – which is why learning more about the medium is so relevant.

We were excited when ShowHeroes asked us to come on board for this essential follow-up research and I'm sure the findings will be valuable for the whole industry.

Stefan Blienkendaal

Head of Data Tech & Insights at KIN ESSO

About ShowHeroes

ShowHeroes is a global leader in delivering sustainable and innovative digital video advertising and CTV solutions that create meaningful connections between brands and consumers, ensuring impactful media experiences.

As a co-publisher to leading online media outlets, the company upholds editorial excellence across a network of close to 2 bln unique users and almost 80 bln views per month (total/ across all channels), promoting quality journalism from the most reliable information and entertainment sources.

With a privacy-first approach, ShowHeroes' video solutions and semantic targeting technology, paired with matched video content, drive value and relevance for both users and advertisers.

Founded in 2016 by Ilhan Zengin, Mario Tiedemann, and Dennis Kirschner with headquarters in Berlin, the company launched ShowHeroes Group in 2020. Composed of its core brand ShowHeroes, production entity ShowHeroes Studios, performance marketing solutions provider Agon Digital, and The Digital Distillery, a networking event and content platform, the group employs 400 people worldwide with operations in 25 markets throughout Europe, LATAM, the US, and Asia.

For more information, visit [ShowHeroes'](#) website.

SHOWHEROES

About KINESSO

KINESSO is a tech-driven performance agency that specializes in unifying media, data, audience analytics, and creative strategies to help brands maximize their marketing potential.

By leveraging advanced technology and data-driven insights, KINESSO enhances digital experiences, audience targeting, and advertising effectiveness across platforms such as search, social media, and programmatic advertising.

Their solutions also focus on commerce and AI-driven automation, aiming to improve customer engagement and drive business results. KINESSO is part of the IPG Mediabrands network.

For more information, visit [KINESSO's](#) website.

CONTACT US

ctv@showheroes-group.com

www.showheroes.com



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