



Brainlabs POV

**The UK still loves
TV, but not as we
once knew it**

Background

On 3rd August 2023, Ofcom released its annual Media Nations report, an in depth analysis into media consumption in the UK. As ever, it's an essential read for brands, providing an almost unrivalled level of detail from multiple data sources into the changing face of the commercial media landscape in the UK.

So what's the big news in this year's report?

We've been particularly interested to digest the latest set of statistics around video consumption. We are very much still a nation who loves watching programmes on the telly, with the TV set accounting for 82% of total viewing. However, *how* we are watching our favourite shows is changing. There are three key shifts in behaviour that caught our attention:

- 01 Time-shifted viewing becoming the norm across all age groups**

For the first time ever, we are seeing older age groups watch less live TV (8% less broadcast TV in 2022) and becoming more likely to turn to streaming services. Disney+ subscriptions have doubled year on year among this older demographic. This shift continues to accelerate among younger audiences, with live TV viewing among 16-34s now at 36 minutes per day (down from 53 minutes in 2021 and 6% lower than in 2019).
- 02 Public Service Broadcaster domination of 'high viewership' programmes wanes**

Broadcast TV saw its biggest ever drop in the UK, down from 83% to 79% in 2022. The number of programmes on Public Service Broadcasters with viewers of over 4 million has halved since 2014. Children and young adults under the age of 25 have collectively reduced their average live viewing by 73% since 2012. It's harder than ever before to achieve a "tent pole" media moment through broadcast alone.
- 03 The ever-growing content 'buffet' is diversifying viewing habits**

Video content is still king and arguably, thriving more than ever before. VOD penetration is at 66% and 81% of UK teens and adults are watching content - of all lengths, formats and types on YouTube. BVOD consumption is increasing year on year as consumers watch more on demand, when they want to and when it suits them. Interestingly, UK figures show four out of five people aged 18-25 use subtitles all or part of the time to aid on the go viewing and access to content in foreign languages. Meanwhile, 25-35 year olds are spending as much time on TikTok as they do watching TV, favouring content types that are 'snackable and digestible' alongside longer-form content strands.

In the words of Lindsey Clay, the CEO of Thinkbox, "TV isn't dead, it's just having babies". For marketers, this means there are more ways than ever before to segment and reach audiences at scale across a multitude of platforms and devices.



How can brands take advantage?

As the AV landscape becomes more digitised, premium AV advertising has become more accessible to advertisers with budgets of all sizes. With lower barriers to entry (shorter lead times, more flexibility on creative), we're seeing a landscape that has become much more of an even playing field. This, coupled with advances in video formats, targeting and measurement, means AV planning has never been more exciting and accessible.

Our mantra for brands is "Be where your customers are!". The best way to invest ad spend is to reflect your consumer's behaviours, and in this case it means ensuring your AV media plan has a holistic mix. Ask yourselves, how we can address the different need-states in the consumer journey and tasks across the marketing funnel.

Three key factors come into play when defining the optimum AV mix on a media plan: audience consumption, quality and effectiveness. Our proprietary AV planning technology ensures our clients are maximising performance and minimising wastage.

A holistic AV planning and buying ecosystem is built on three core principles



Connected in how we use data to plan and measure AV holistically. Focus on attentive reach, that truly reflects how people are consuming video throughout the funnel.



Relevant in how we use creative experimentation ensuring that video creative flexes to the context and chosen platform. Set hypotheses to test throughout your campaign and continually adapt your approach in-flight, based on learnings.



Predictive in how we use AI and machine learning to build custom solutions that predict the right inventory and audiences to bid against. Digital-first insights should inform your AV creative and messaging, with an agile approach to generating responsive creative based on the latest trends.



What results can I expect?

Our testing has proven that a holistic AV strategy can not only drive business growth, but also provide competitive advantage for your brand.

01 More bang for your buck

A shift away from linear into programmatic or connected TV can provide up to 7 percentage points of incremental reach at the same level of investment.

02 More focus and efficiency targeting

That reach can translate into ROI gains of +25% through improvements in media efficiency and on-target reach.

03 Strong results

We've seen that YouTube video campaigns can deliver strong shifts in brand perception, and in some instances shifting brand uplift of up to 9%.

Interested?

Get in touch, to find out more on how we can turn the UK's ongoing love of TV into a powerful growth opportunity for your business!



[**partnerships@brainlabsdigital.com**](mailto:partnerships@brainlabsdigital.com)

