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# CONSUMER BEHAVIOR IN USING CONNECTED TV

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## 2024



# Content

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- .CTV Users Attitude Towards Advertisements
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# Executive Summary

- Household Attention: Connected TV (CTV) is highly effective in capturing household attention, with 70% of CTV consumption driven by family viewing.
- CTV viewership reach the highest at night, especially on weekdays where it reach 74%. Viewership on weekend at day-time is quite high at 37%-45%, much higher compared to weekdays.
- Local channels have the potential to engage with 77% of the affluents. Other potential channels are from Western that are being watched by 73% of the affluents followed by 61% from South Korea.
- 8 of 10 of the affluent CTV users had subscribed on OTT, where Netflix is the most popular followed by Disney+ Hotstar.
- Advertisements on OTT is likely to watch by 63% of OTT users where 79% of them are likely to pay attention to the advertisements.
- Food / Beverage or Mobile-phone/gadgets advertisers can utilize advertisements on CTV because more than 50% of the affluent CTV users like to watch these categories advertisements on Connected TV.

# Research Objective and Methodology

# Objective

To understand the affluent segment :

- Behavior in using Connected TV
- Behavior in using OTT in Connected TV
- E-commerce usage through Connected TV
- Attitudes towards advertisements in Connected TV

# Research Design

## Methodology :

- . Online Survey by using YouGov Panel that meet Target Respondents Criteria .
- . Max. 15 minutes of Length of Interview (questionnaire filling)

## Respondent Criteria :

- . Male and Female
- . Age 18 years old and older
- . Owner and user Connected TV which connect to internet
- . Live in HH with minimum income of Rp. 10 Mn.

## Coverage Area :

- . Nation wide

## Sample Size :

- . 500 respondents

# Respondents Profile

# FINDINGS - Affluent Segment Owner/User CTV Profile

65%+

Are aged 44 years old or younger, Married people with income Rp. 10-16 Mn. They are also productive people who earn money.

81%

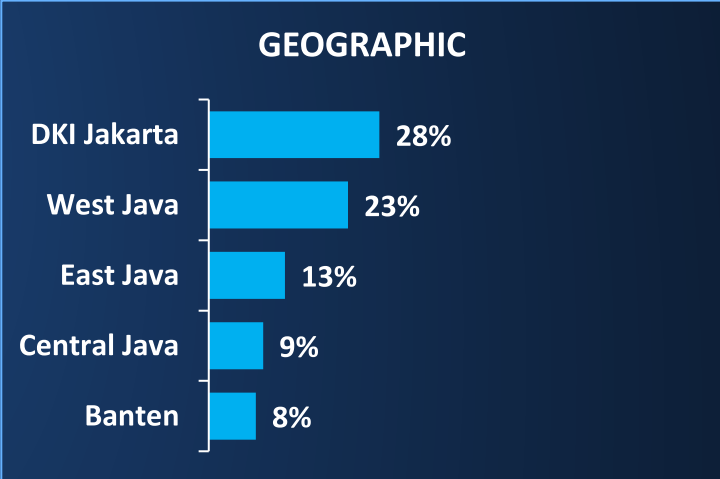
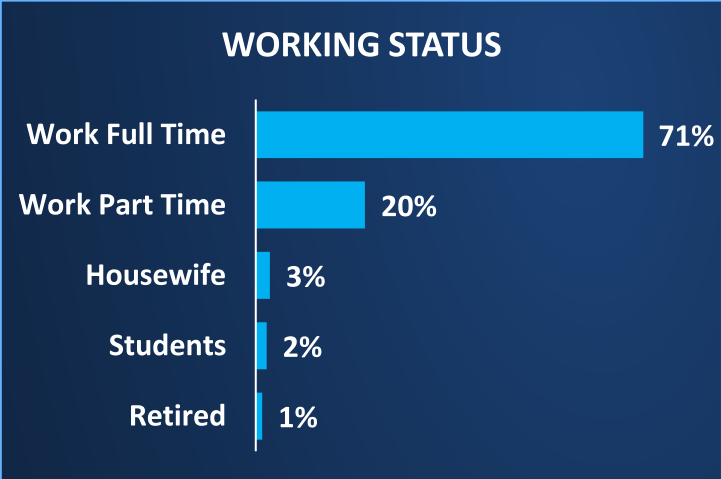
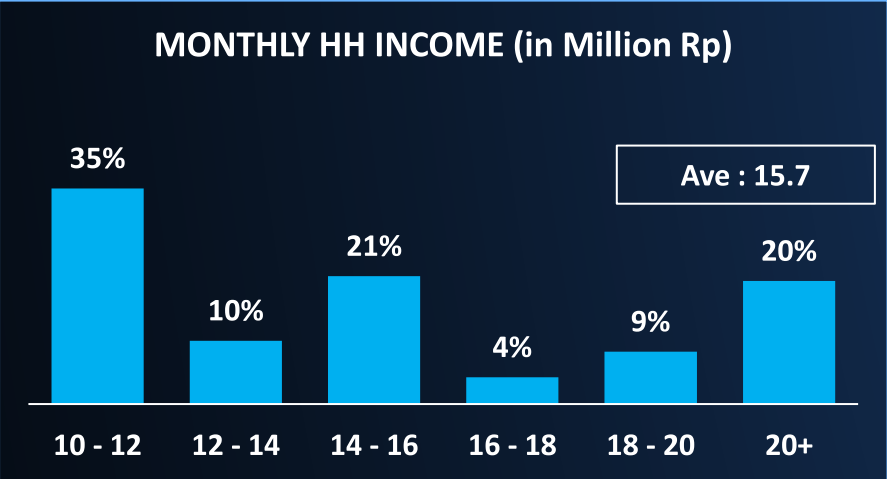
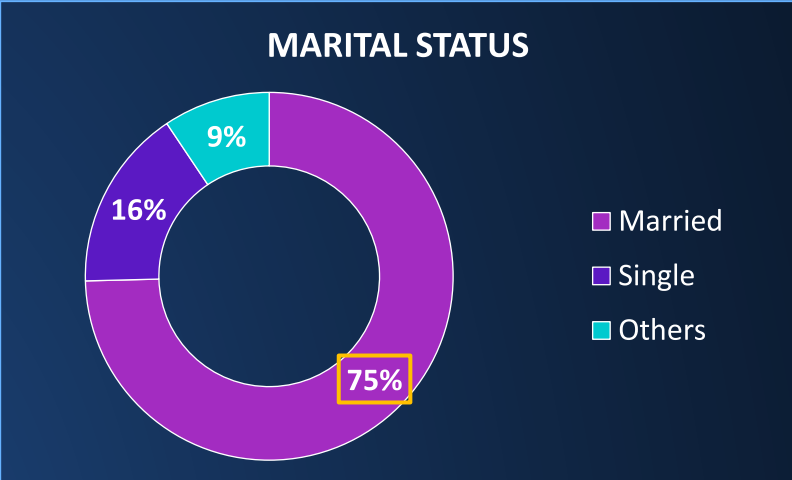
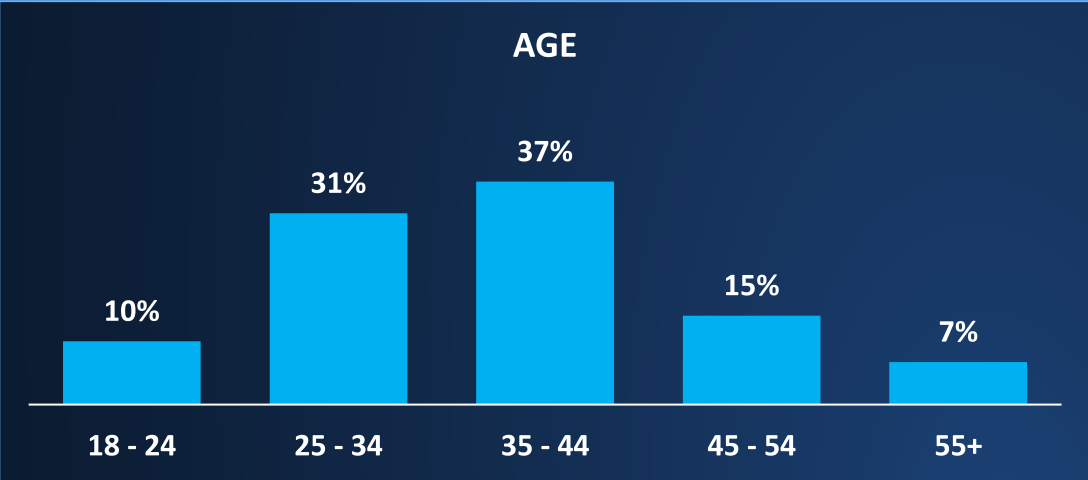
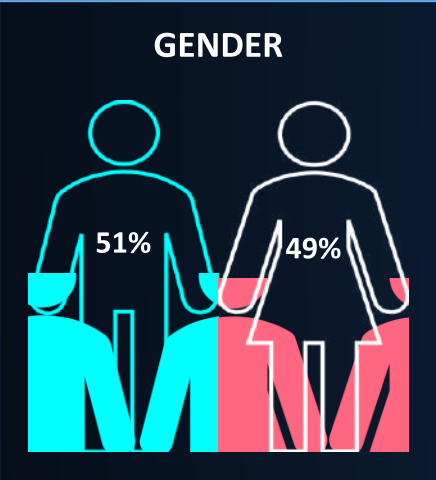
81% Live in Java island.

100%

Are having social network, many of them also have more than one platform where Whatsapp, Instagram, YouTube, Facebook and TikTok are



# Demographic Profile



Dominated by 25-44 years of Married people working with an average monthly income of almost Rp. 16 Mn and live in Java island.

# Social Network Used



They use multiple social networks, Whatsapp is the popular one, followed by Instagram and YouTube.

# CTV Usage

# FINDINGS – Connected TV Usage

- **Watching CTV is part of the affluent's WE TIME**  
More than 60% of them watch it with their spouse or children.
- **They like THE EASE and CONNECTIVITY of CTV.** More than 70% like the easiness to connect with YouTube or other streaming applications. Also, it is convenient to connect to their gadgets, especially mobile phones (61%). 73% of the affluent watch CTV every day.
- **Daytime viewership is quite high, 37%-48%.**
- **83% of the affluent watch YouTube or OTT through CTV.**
- **Attitudes towards advertisements in Connected TV**

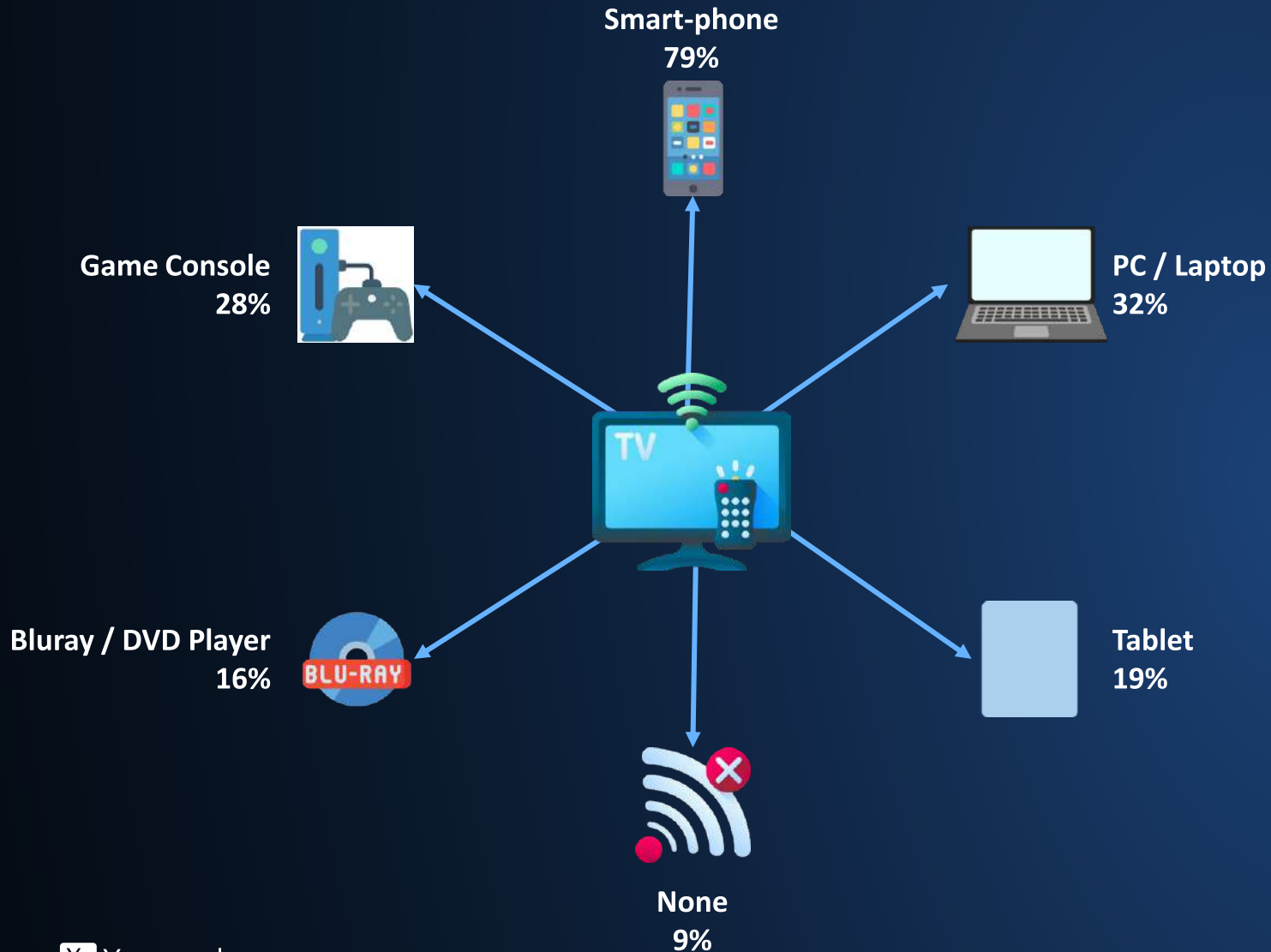
# Smart TV Brand Owned



**4 of 10 of respondents have Samsung Smart TV in their house, even though the average price of Samsung is the highest compared to other popular brands.**

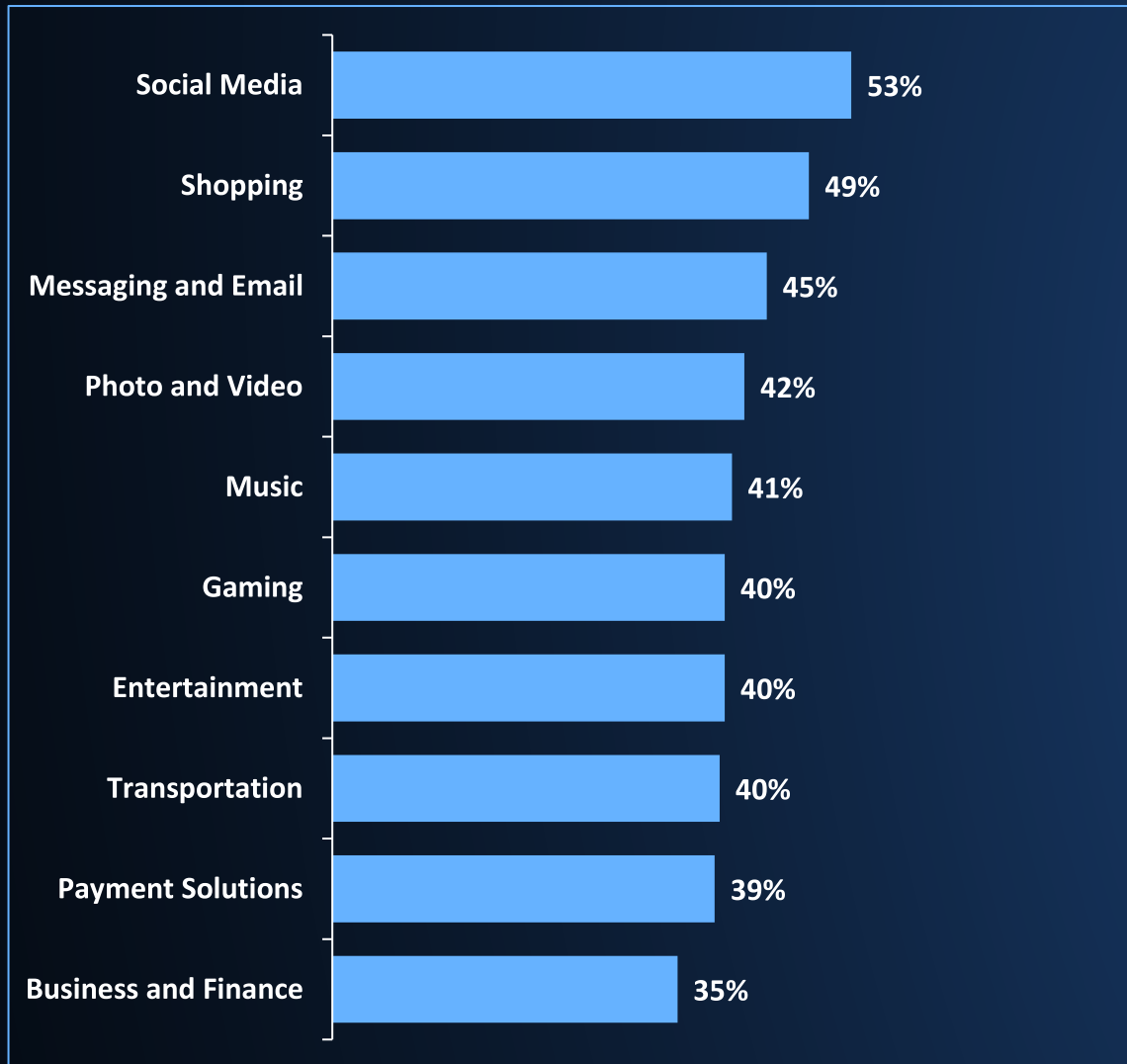
**It might relate with the Samsung owners' average income (Rp. 16.0 Mn) which is higher than other brands' owner income (Rp. 15.6 Mn).**

# Connected Devices to CTV



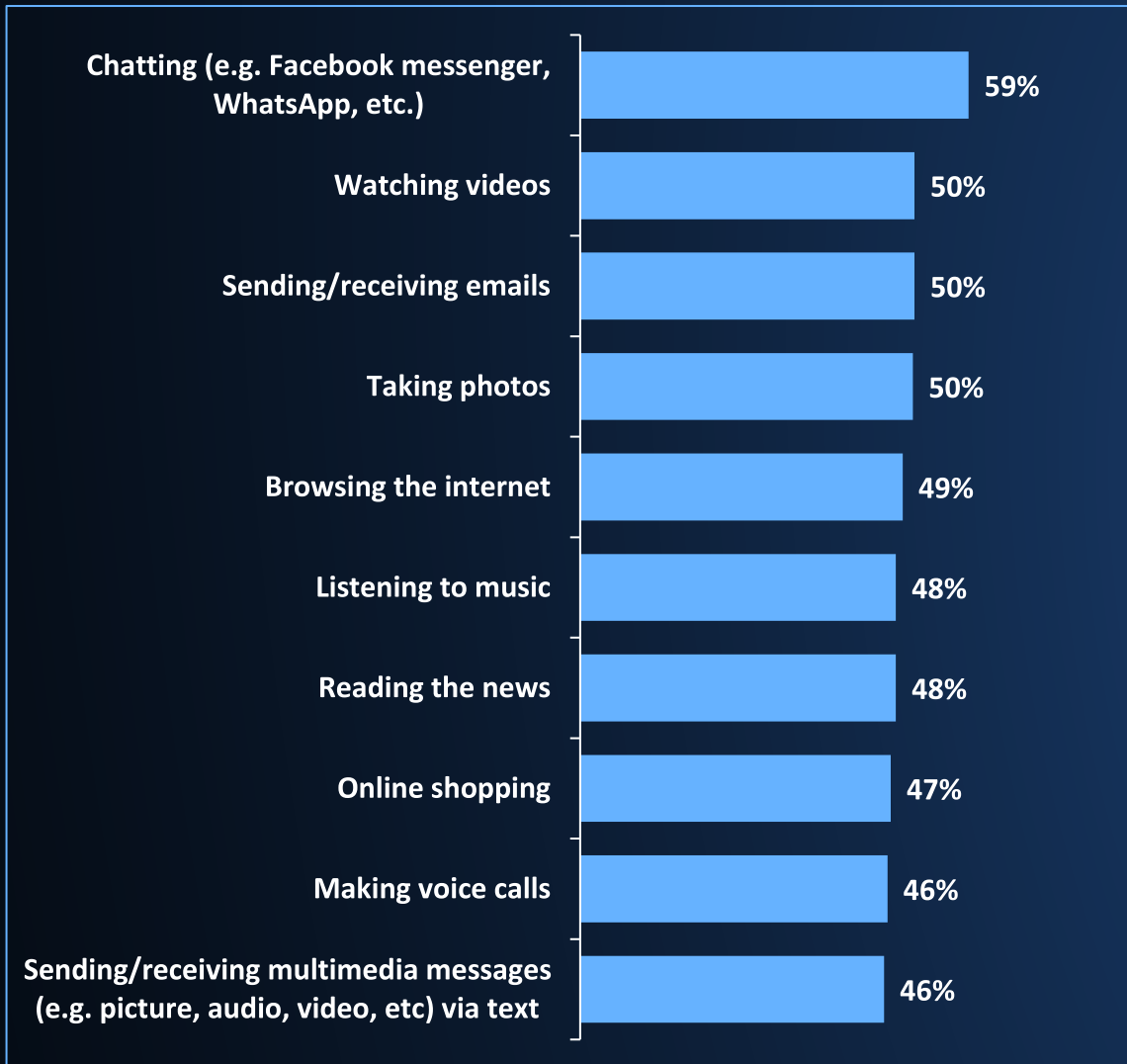
- Almost 80% is connecting their CTV with their Smart-phone which likely making more Synchronization of cross-device
- Second-Screen usage also become key points that need to consider on understanding users behaviours

# Application Used on Smart-phone



- **5 of 10 users who connect their CTV with their smartphone generally use social media or shopping applications.**

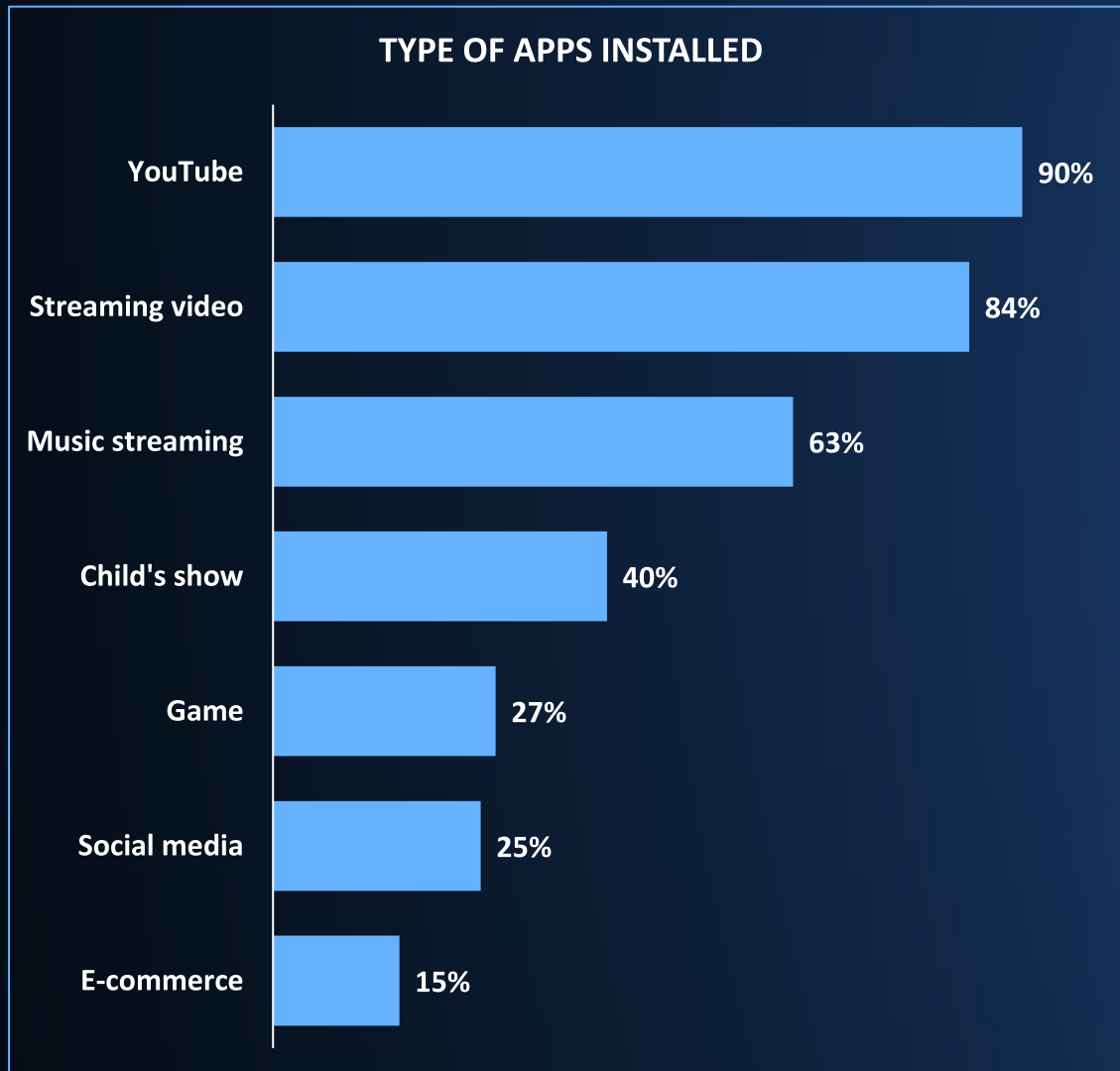
# Daily Activities on Smart-Phone



**They use their Smart-phone mainly for daily Chat, watching videos, mailing or taking photos.**



# Application Installed on CTV



**90% of CTV users had installed YouTube, followed by other Video streaming applications as well as Music streaming applications.**

# Key insight from connected device to CTV

## Cross-Device Synchronization

Many CTV platforms and apps allow for synchronization between mobile devices and TVs. This cross-device interaction can lead to more integrated and consistent viewing experiences.



## Second-Screen Usage

Users often engage in second-screen behavior while watching TV. This behavior provides additional data points for understanding viewer interests and engagement.



## Seamless User Experience

Connected experiences between CTV and mobile devices contribute to a seamless user experience.. This continuity enhances user satisfaction and can influence how users interact with content and ads.



# Liking from CTV

Easiness to use YouTube	77%
Easiness to watch a streaming application	70%
Have picture appearance with high resolution or full HD up to 4K	67%
Easiness to connect with handphone	61%
Can be used to internet browsing	53%
Connected with various devices	51%
Can be used for playing game	36%
Having Google Assistant feature	33%
Can be used for downloading various applications	31%
Has many port and connectivity option	31%
Frequent software update and application	24%

**More 3 of 4 CTV users like the easiness in watching contents through various applications and better watching experience by high resolution display.**

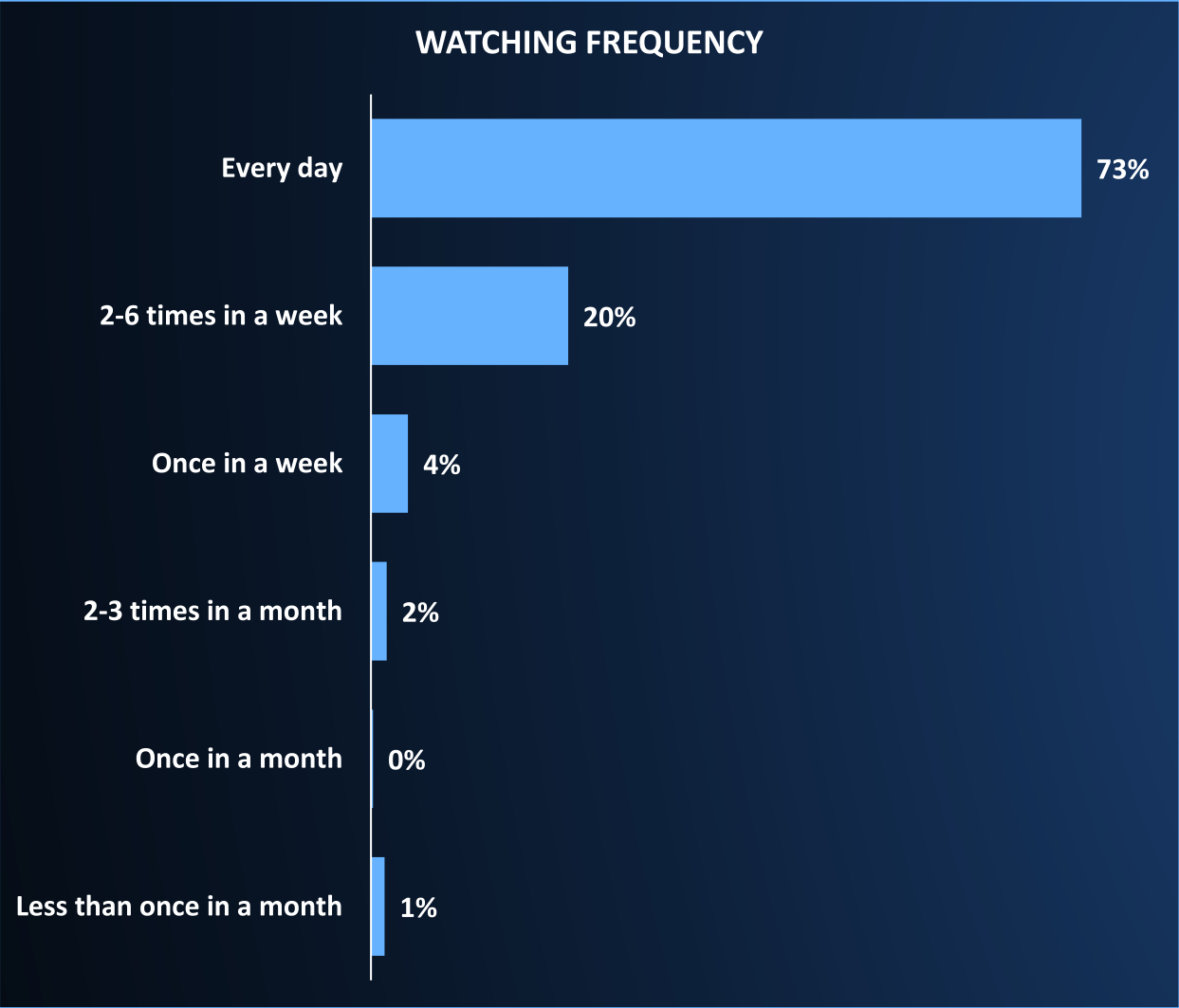
# CTV Viewer Dislikes and Expectations

Challenges	%
Depend on stability of internet connection	56%
Limited available applications	32%
Less responsive/ slow user interface	22%
Limited software or application update	19%
Can't do software and application update routinely	16%
Limited connectivity options	15%
Complicated user interface	14%
None	11%
Don't have Google Assistant feature	10%
Can't connected with many devices	10%

Expectations	%
Many applications available	53%
Not depend on stability of internet connection	52%
Responsive/ fast user interface	42%
Connected with many devices	38%
Unlimited connectivity options	38%
Easy user interface	35%
Unlimited software or application update	34%
Able to update software and application routinely	34%
Have Google Assistant feature	29%
None	2%

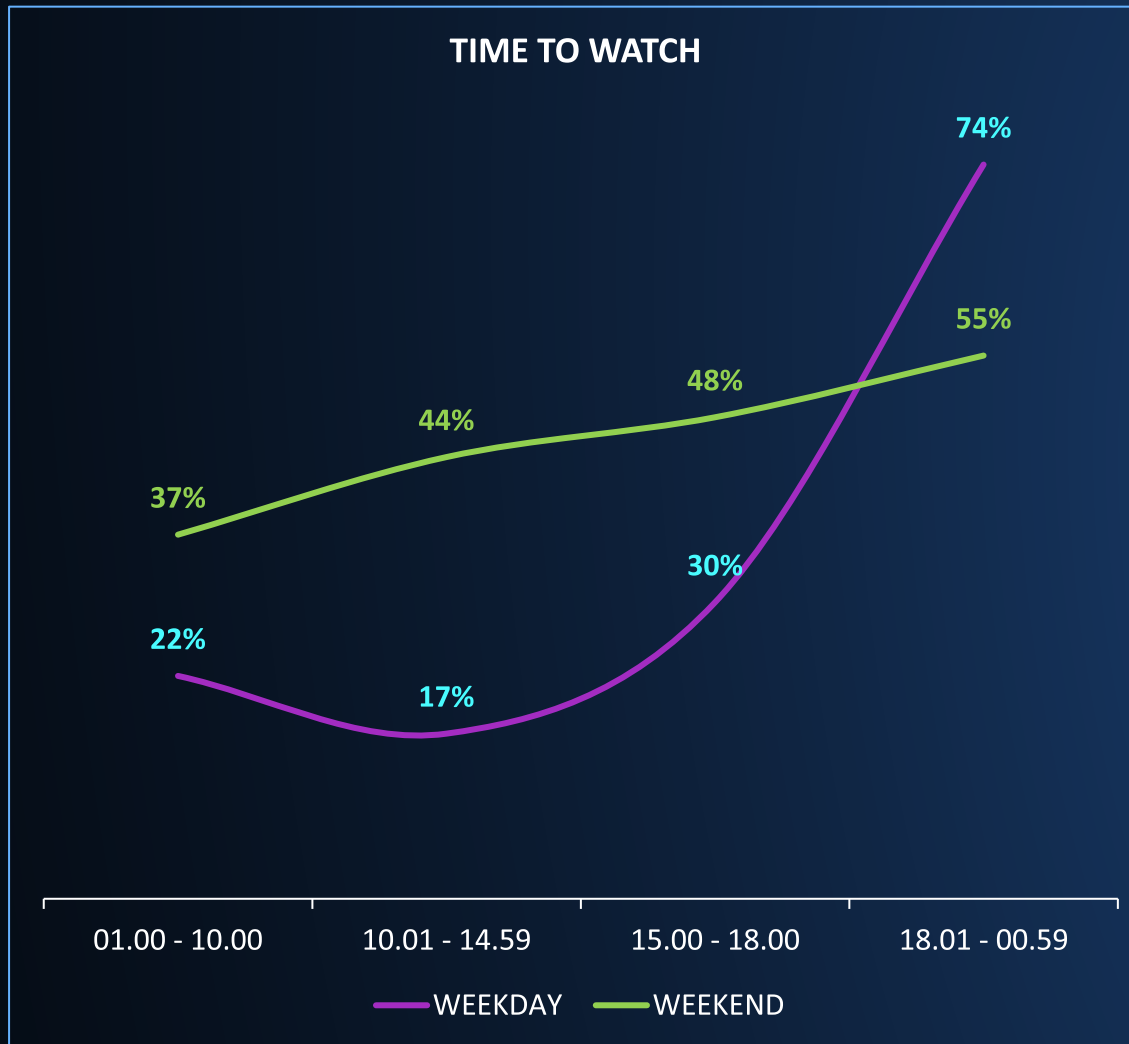
**However, some of them are still not satisfied with the variety of applications.**

# CTV Watching Frequency



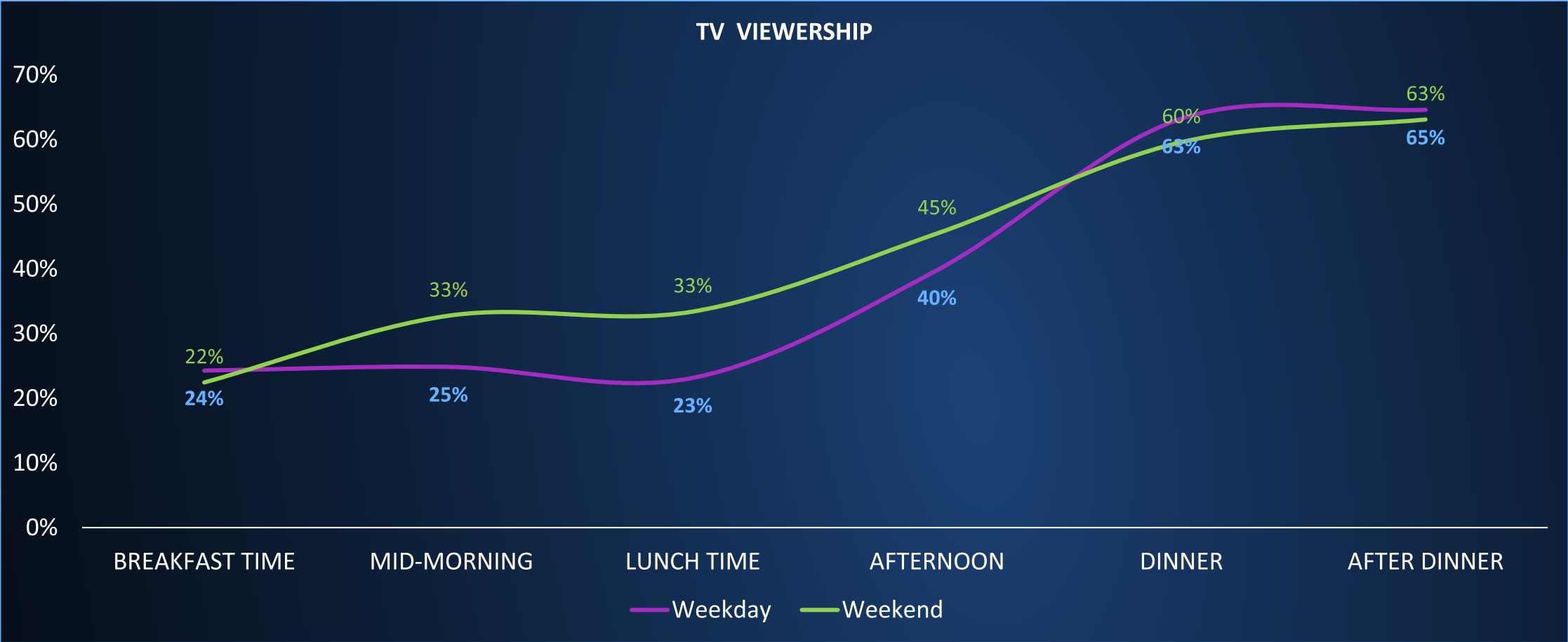
7 out of 10 watch their CTV every day

# CTV viewing across timebands on weekends & weekdays



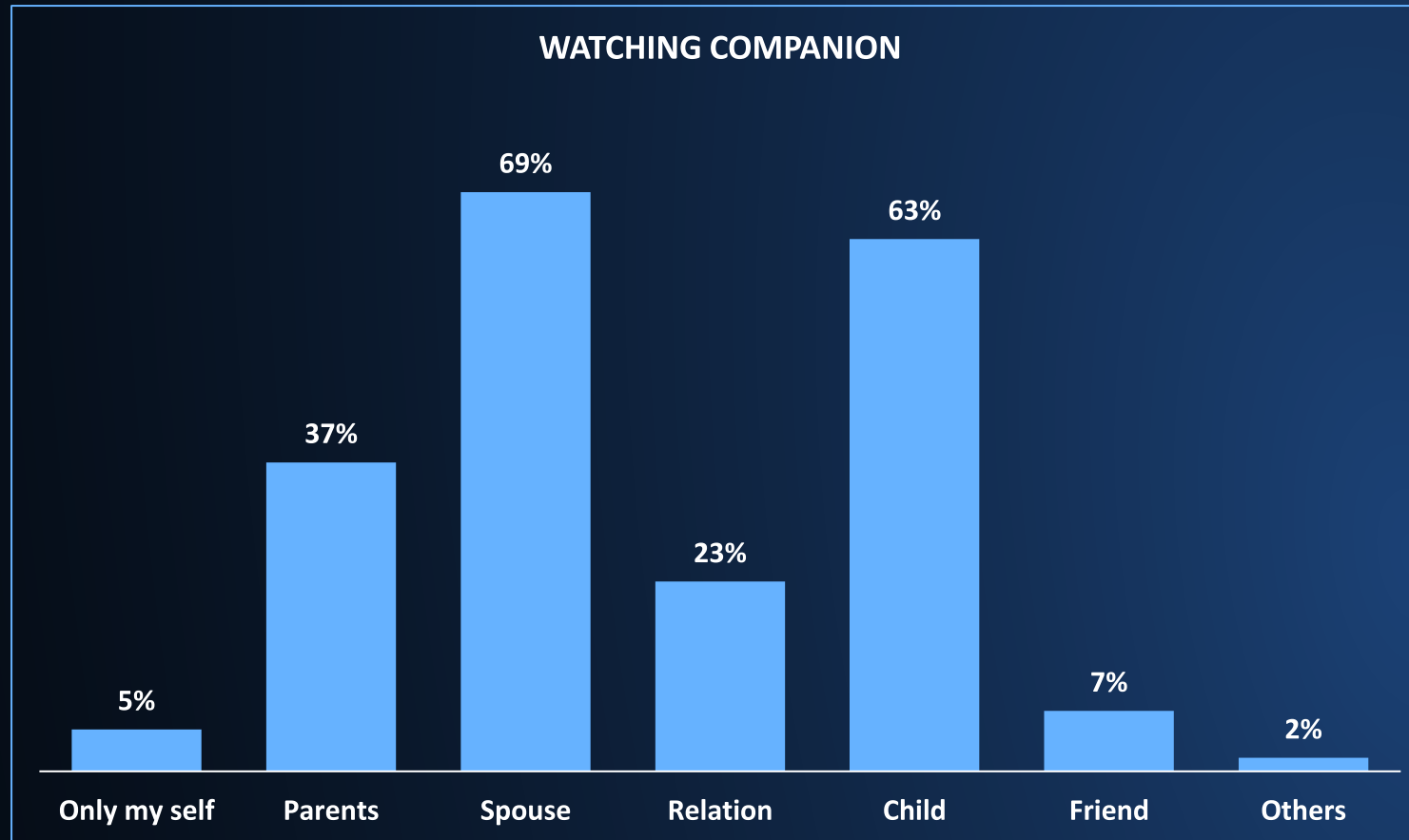
- The usage reach the peak in the evening both on weekdays or weekend, but during the weekend it is flatter.
- Just like general TV viewership, day-time viewership on weekends is higher than weekdays, but CTV viewership gap between weekdays and weekends in most day-part is much higher than general TV viewership.

# General TV Viewing shows different pattern compared to CTV, especially during weekend



**Viewership reaches its peak at night on both weekdays and weekends. On weekends, viewership continues to increase throughout the day and is more consistent compared to weekdays.**

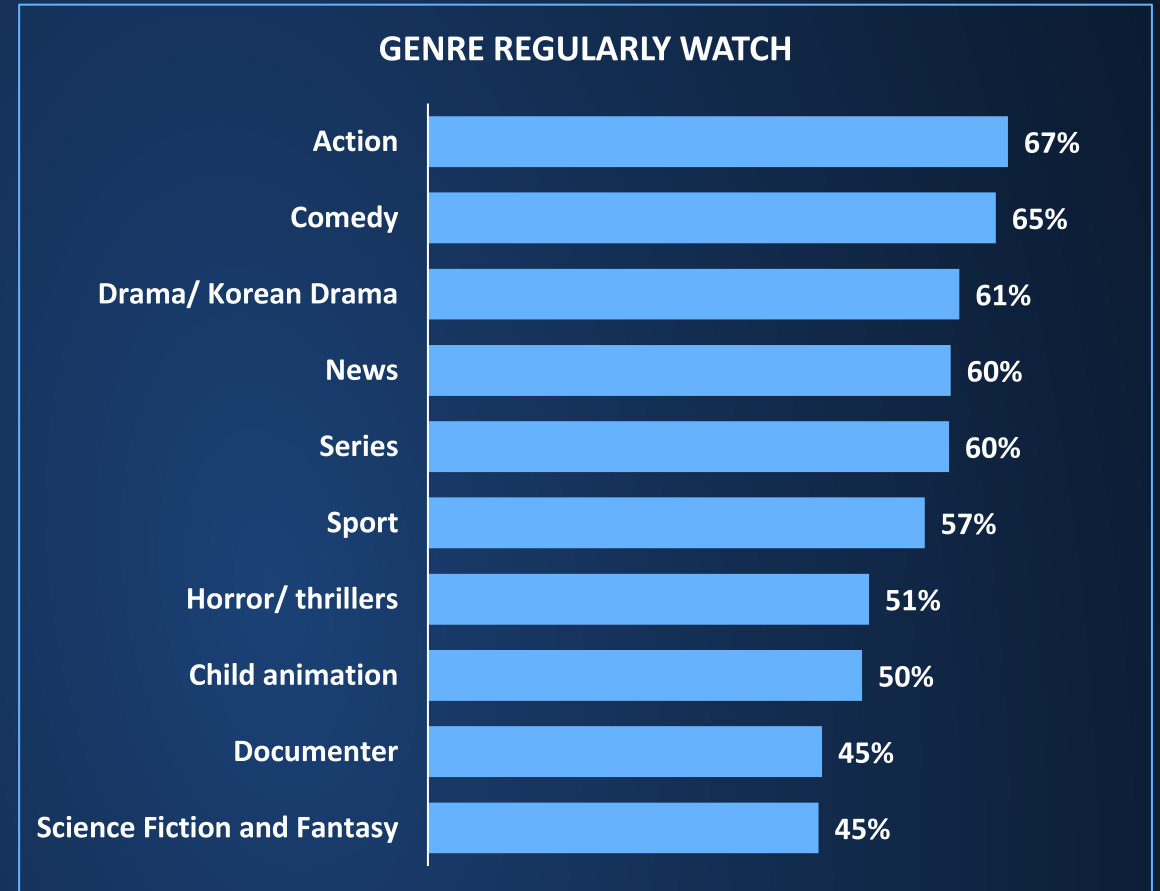
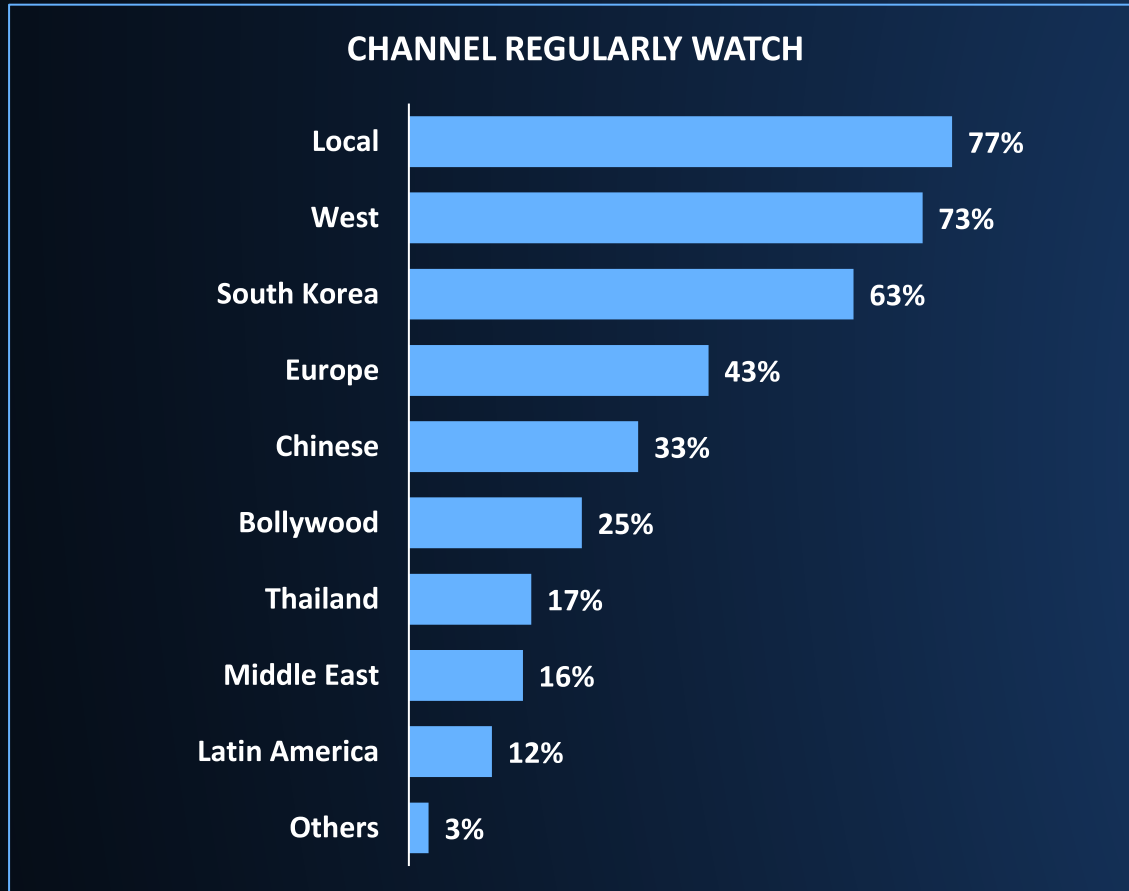
# CTV Watching Companion



**More than 60% is watching on CTV with their spouse and children**



# The Content Watched on CTV



**Even though they can watch contents from abroad channels, but the highest channel to watch is still local channels (77%). And 60% or more likes to watch Action, Comedy, Drama, News or Series.**

# Method to Watch Channel on CTV



83%



83%



49%

Aside YouTube, more than 80% watches OTT apps through CTV.

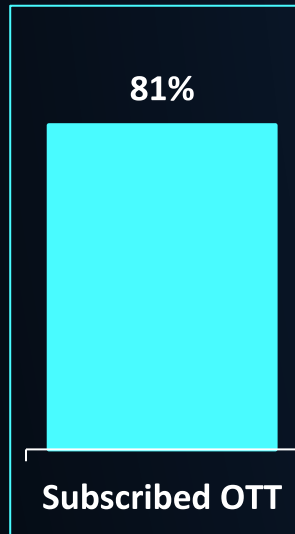
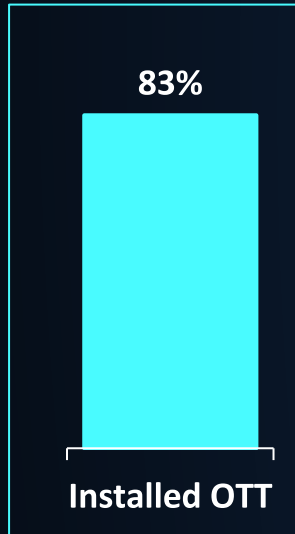
# OTT USAGE

# FINDINGS – Connected TV Usage

## FINDINGS – OTT Usage

- 8 of 10 affluent CTV users had installed and subscribed to OTT
- Netflix is the most popular OTT brand with the highest subscriber conversion of 92%.
- 62% of the affluents are the decision maker when they subscribe the OTT, while 23% of respondents made decision together with their family.
- 75% watch OTT more than once a week, 18% lower than watching through CTV in general.

# OTT Installed and Subscribed



**HBOGO**  
30%  
(48% subscribed)



**WeTV**  
25%  
(39% subscribed)



**Vidio**  
46%  
(60% subscribed)



**Viu**  
25%  
(49% subscribed)



**Disney+**  
55%  
(75% subscribed)



**RCTI+**  
26%  
(32% subscribed)



**Netflix**  
89%  
(92% subscribed)



**Amazon Prime Video**  
30%  
(60% subscribed)

8 of 10 affluent CTV users had installed and subscribed to OTT

# Average Cost for OTT Subscription



HBOGO  
Rp. 86K



WeTV  
Rp. 74K



Vidio  
Rp. 82K



Viu  
Rp. 76K



Disney+  
Rp. 104K



RCTI+  
Rp. 109K



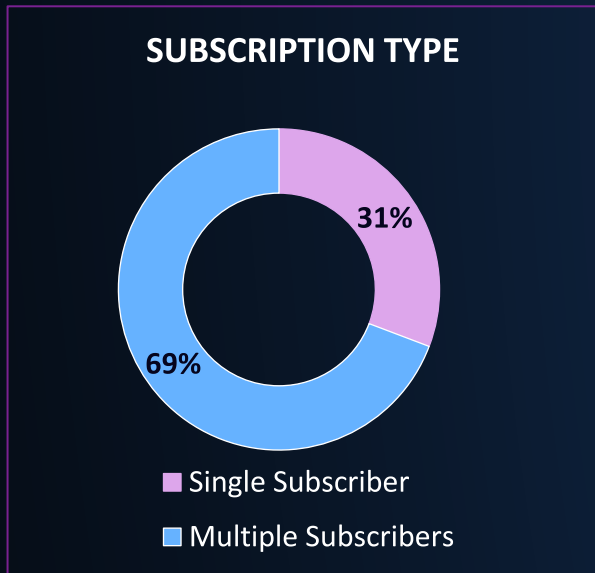
Netflix  
Rp. 111K



Amazon Prime Video  
Rp. 86K

...even though the cost for subscription for those two brands are amongst the highest with more than Rp. 100K per subscription.

# OTT Subscription Type



M 100%



S 7% : M 93%



S 8% : M 92%



S 27% : M 73%



S 5% : M 95%



S 6% : M 94%



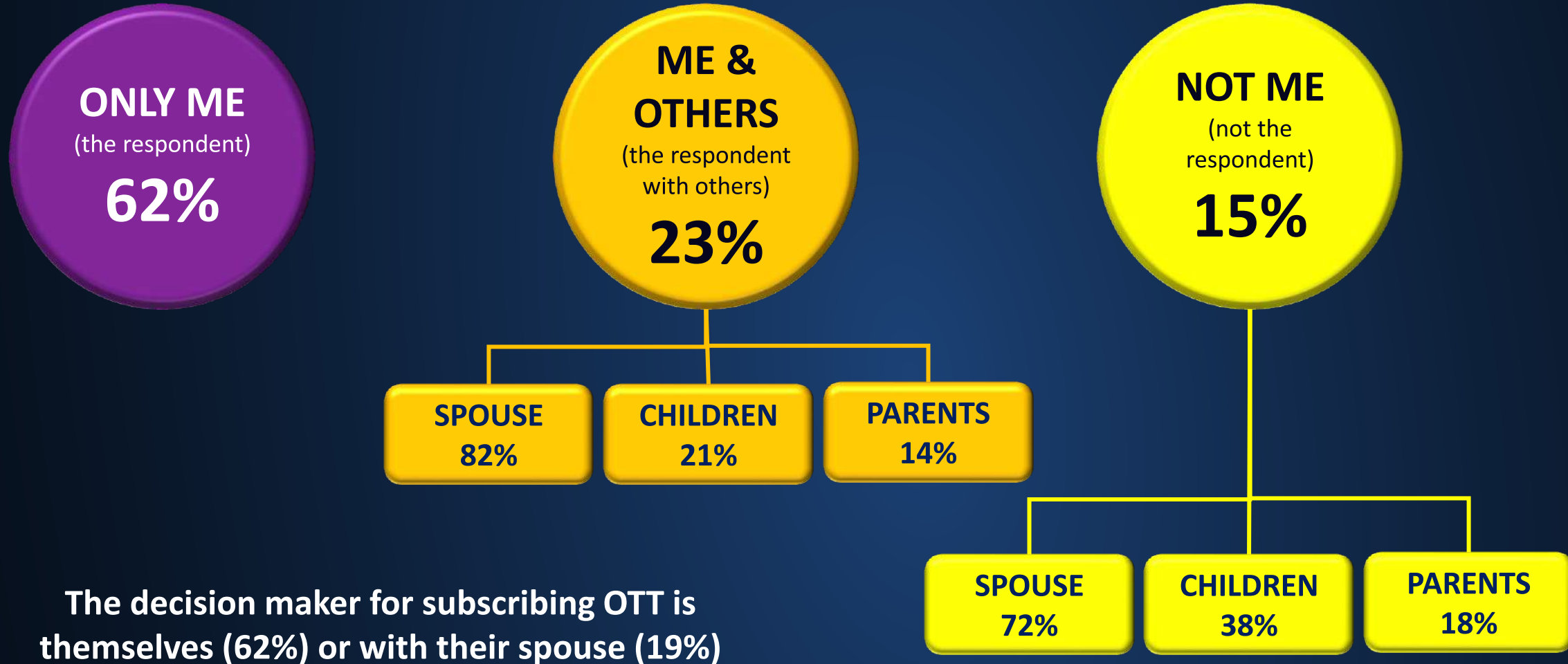
M 100%



S 5% : M 95%

**69% of subscribers enjoy multiple subscriptions.**

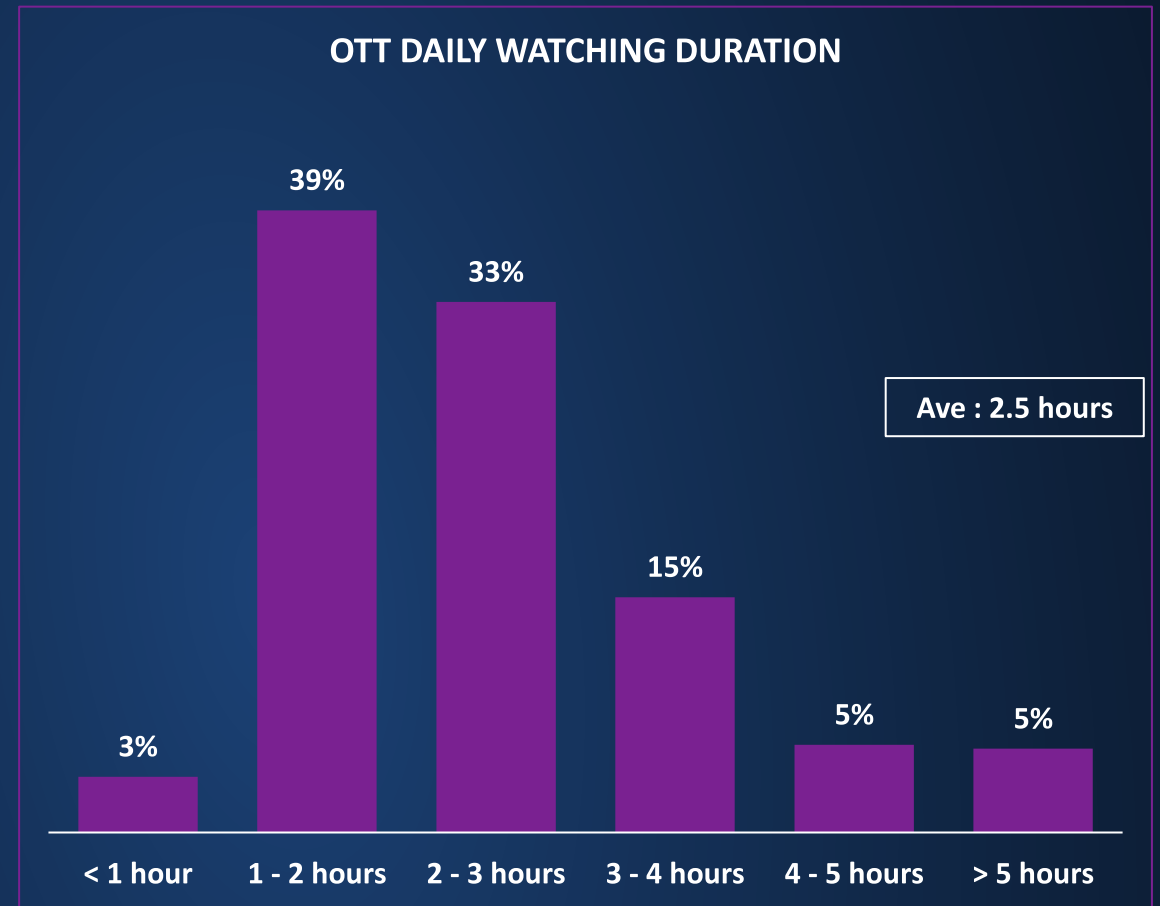
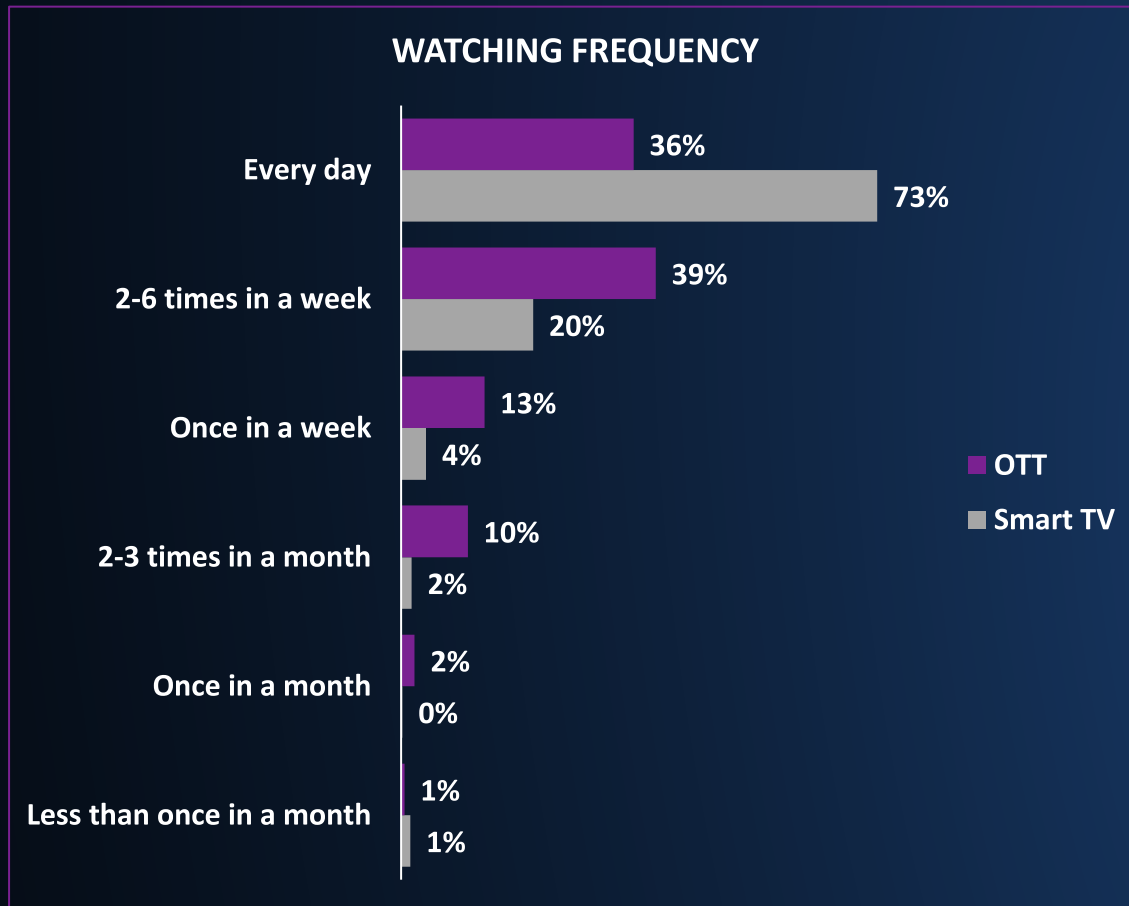
# Decision Maker for OTT Subscription



The decision maker for subscribing OTT is themselves (62%) or with their spouse (19%)

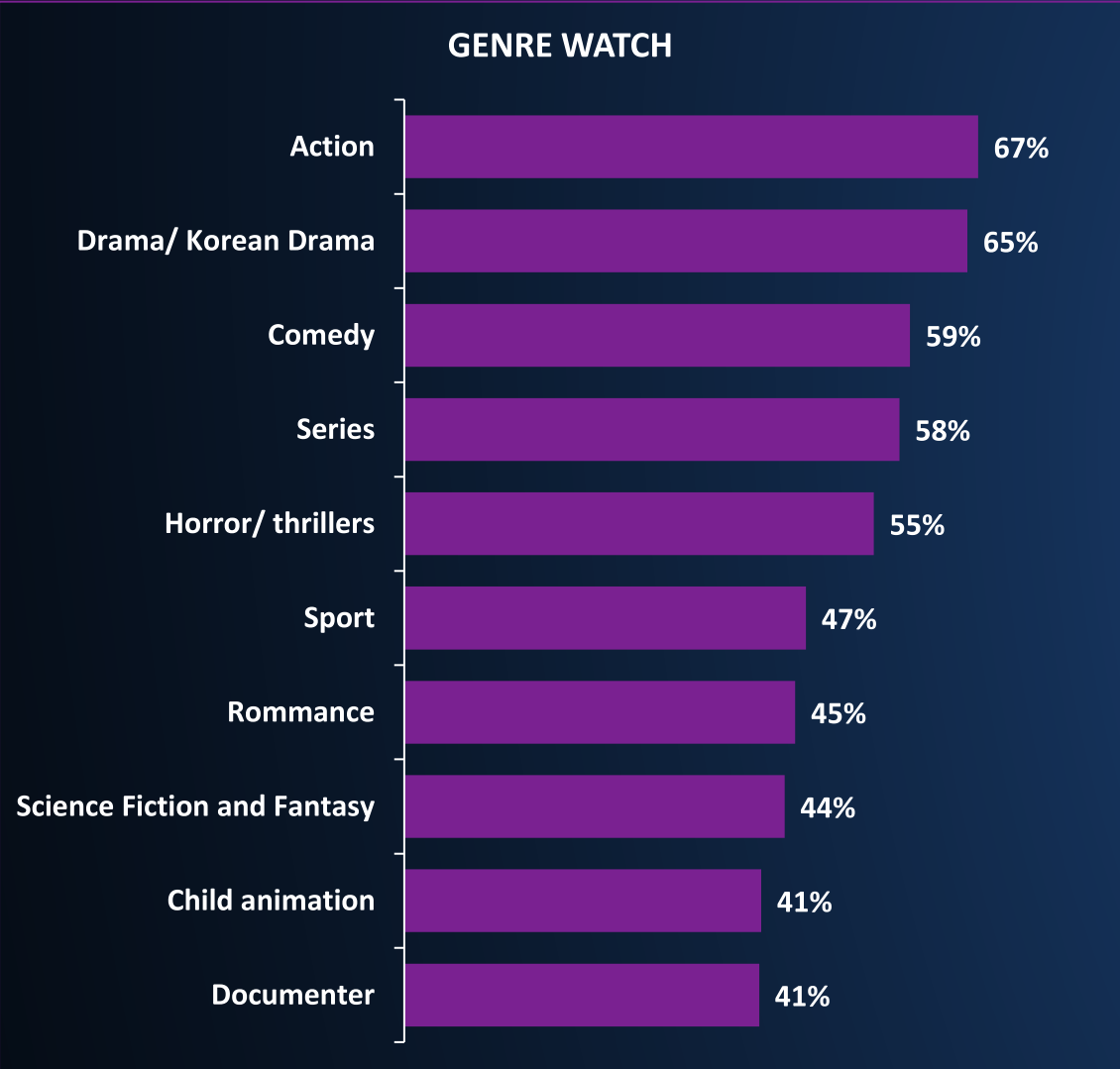


# OTT Watching Habit



**75% of them watch OTT more than once a week, it is lower compared to CTV with 93%.  
Average time spend to watch OTT is around 2.5 hours per day with 75% of them spend 3 hours or less.**

# Genre Watched on OTT



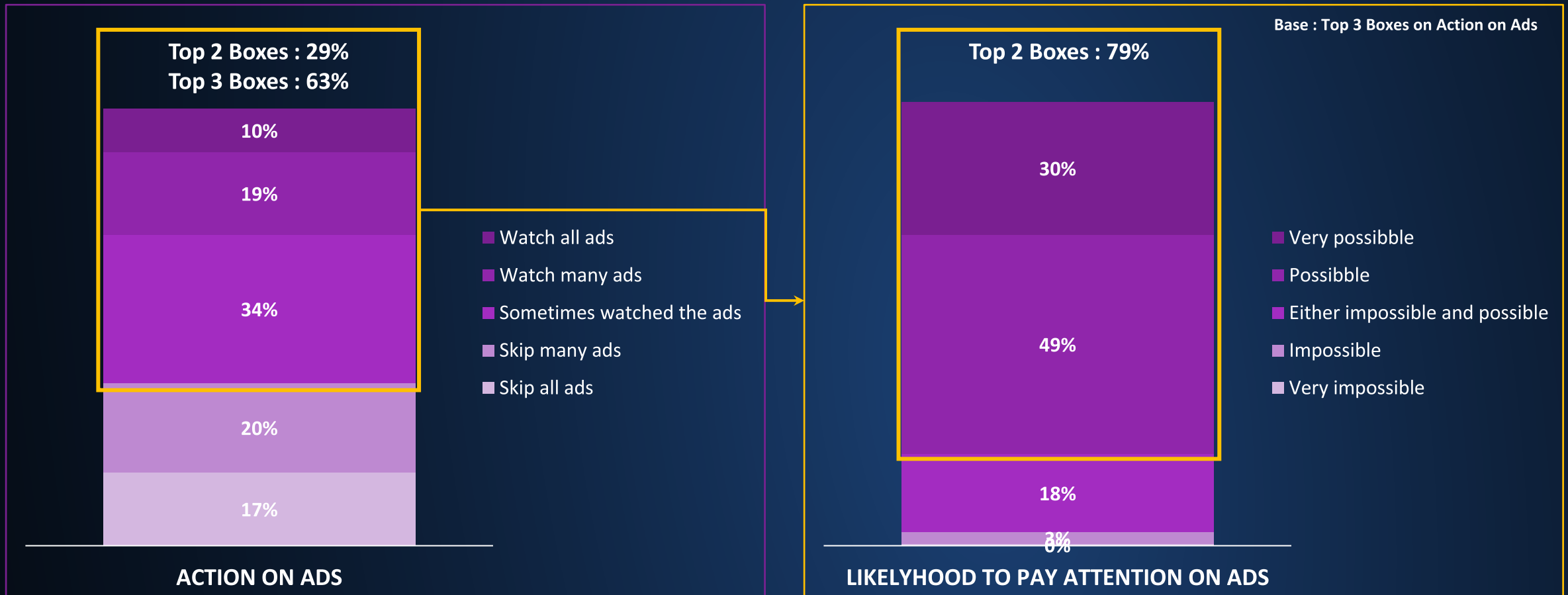
Most OTT user like to watch Action, Drama, Comedy, Series or Horror/thrillers.

# Attitude towards Advertisements

# FINDINGS – Attitudes towards Advertisements

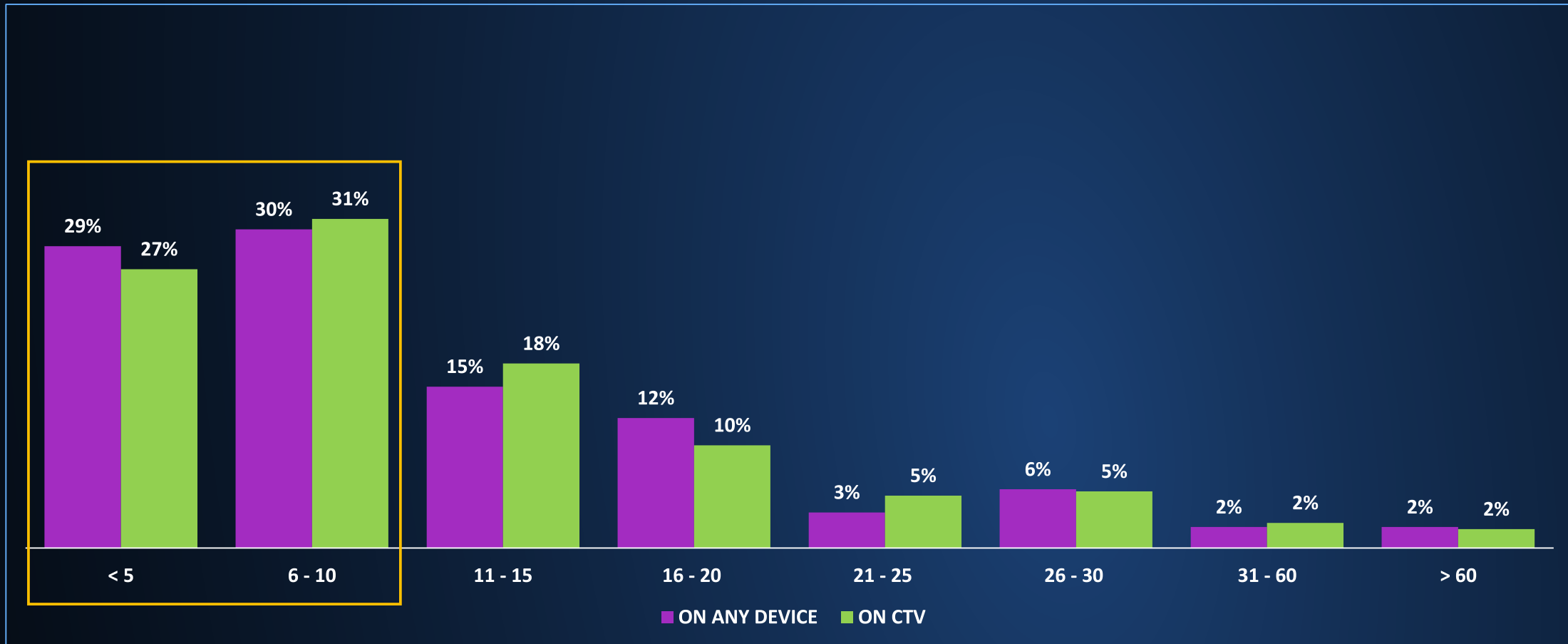
- **63% of the affluent OTT users have propensity to watch advertisements, and 79% of these 63% are possibly to pay attention to the advertisements.**
- **74% of affluent CTV users can recall 5 advertisements or less every time they watch through CTV.**
- **73% of affluent CTV users will search advertised products if they are interested in advertisement**

# Action towards Advertisements on OTT



**6 of 10 OTT users have a propensity to watch advertisements and 79% of these 6 people would possible be paying attention to advertisements.**

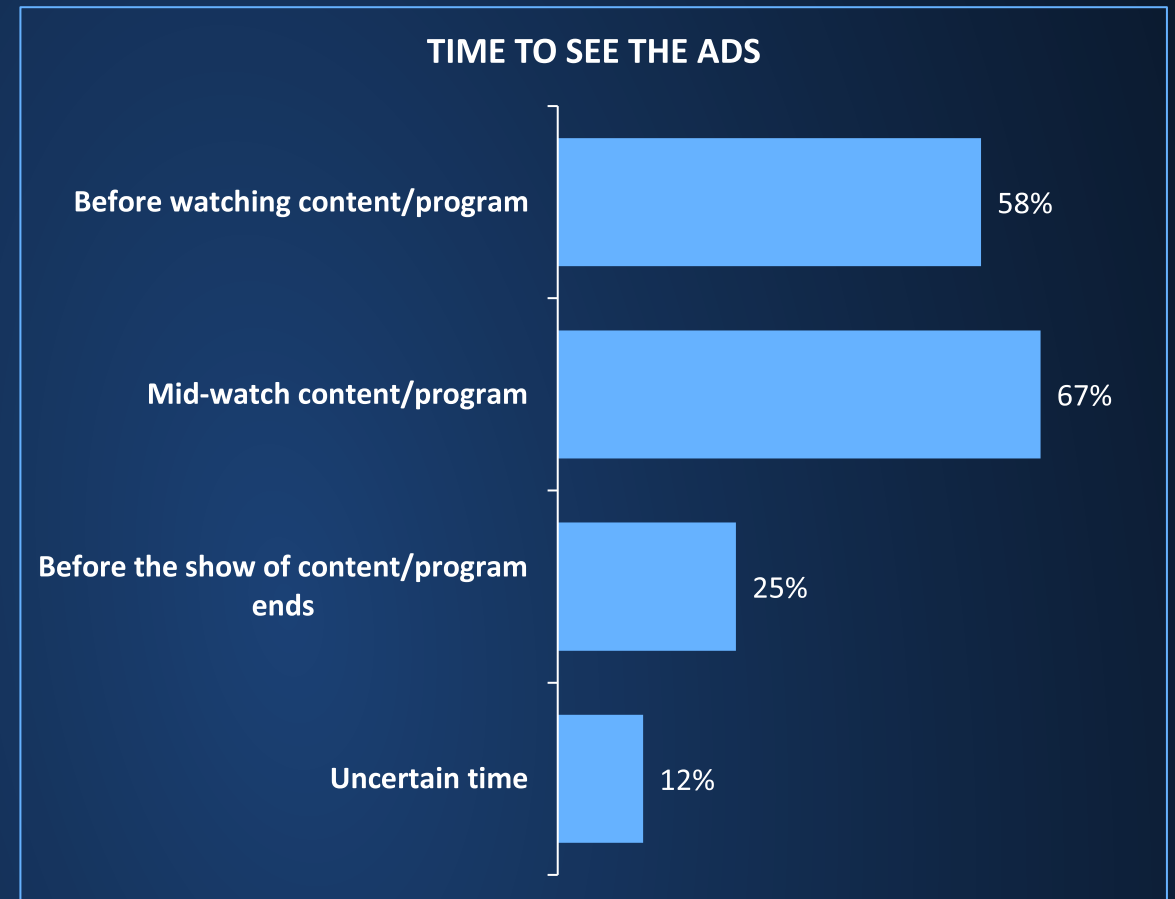
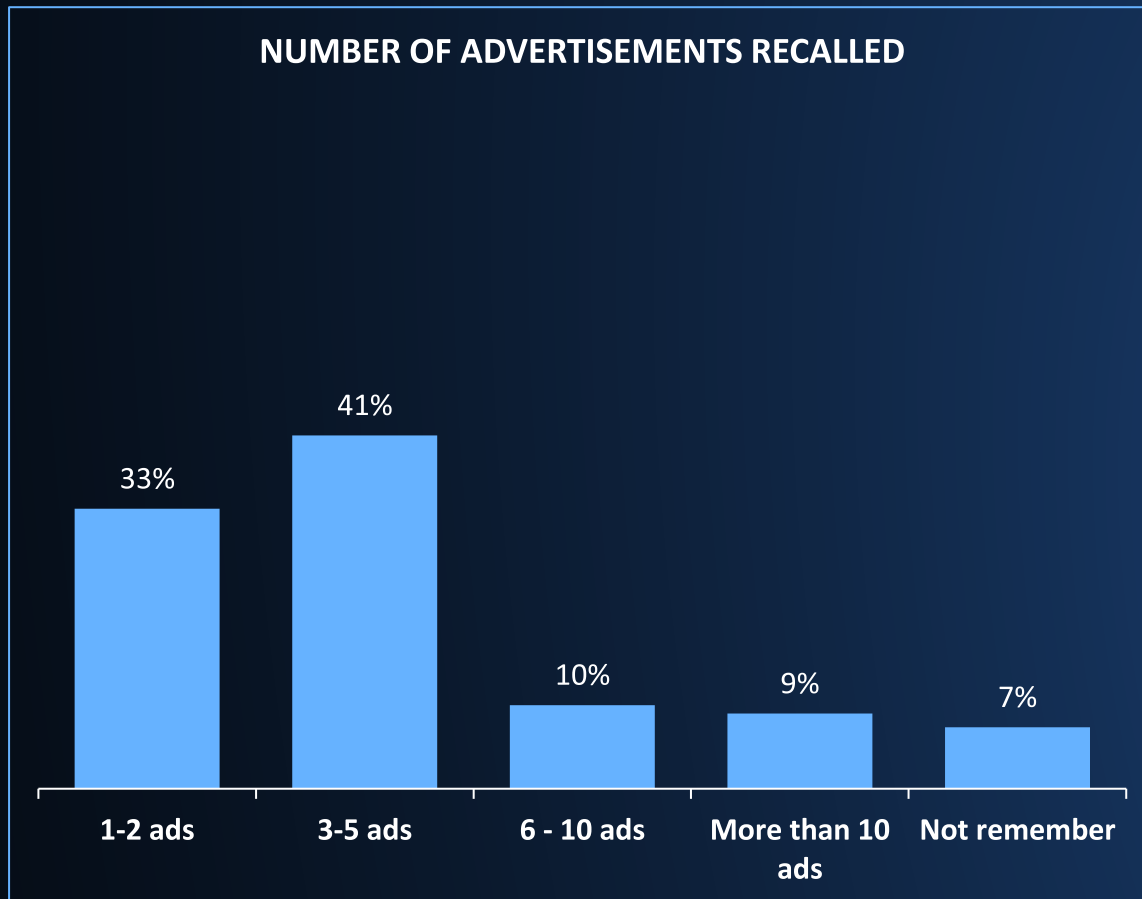
# Preferred Duration to Watch An Advertisement on CTV (in Seconds)



Most of them prefer shorter advertisements duration.

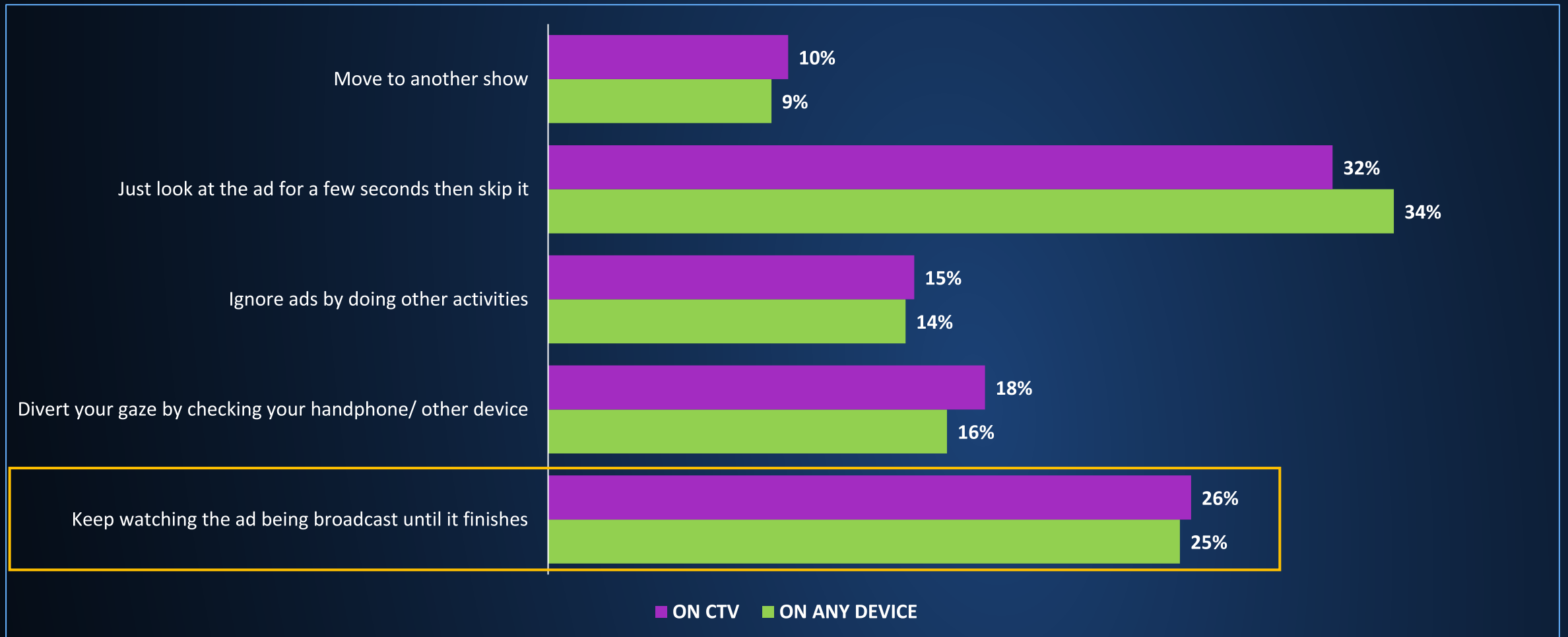
Average preferred duration to watch the advertisement is 12 seconds both on CTV or any device.

# Advertisements Recall on CTV



**Most of them can remember 5 ads or less every time they watch CTV , and they see those ads mostly before or in the middle of the content.**

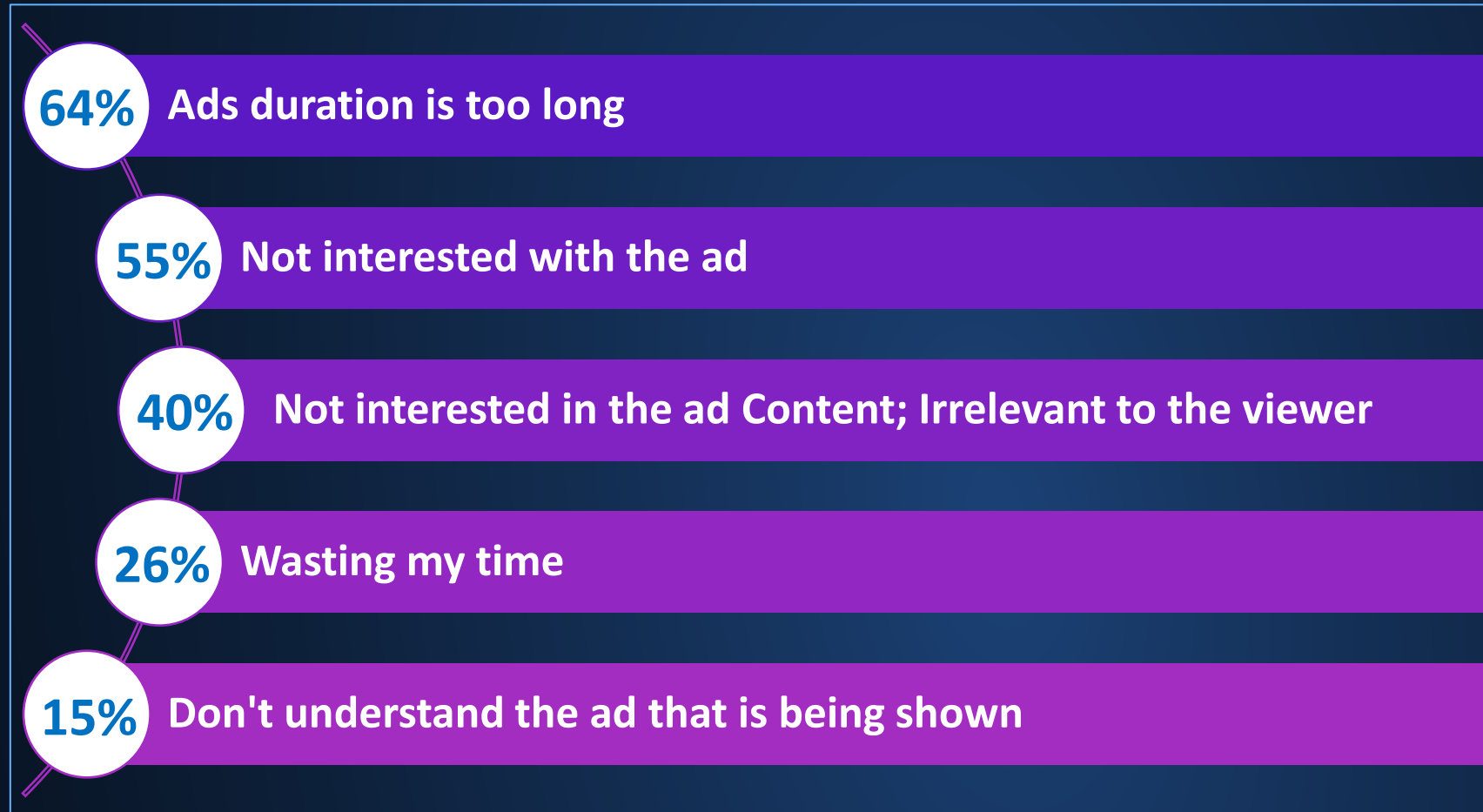
# Response When See Advertisements - Ad Interaction Insights



**A quarter of them will keep watching the advertisement until it finishes, and the rest will skip it...**

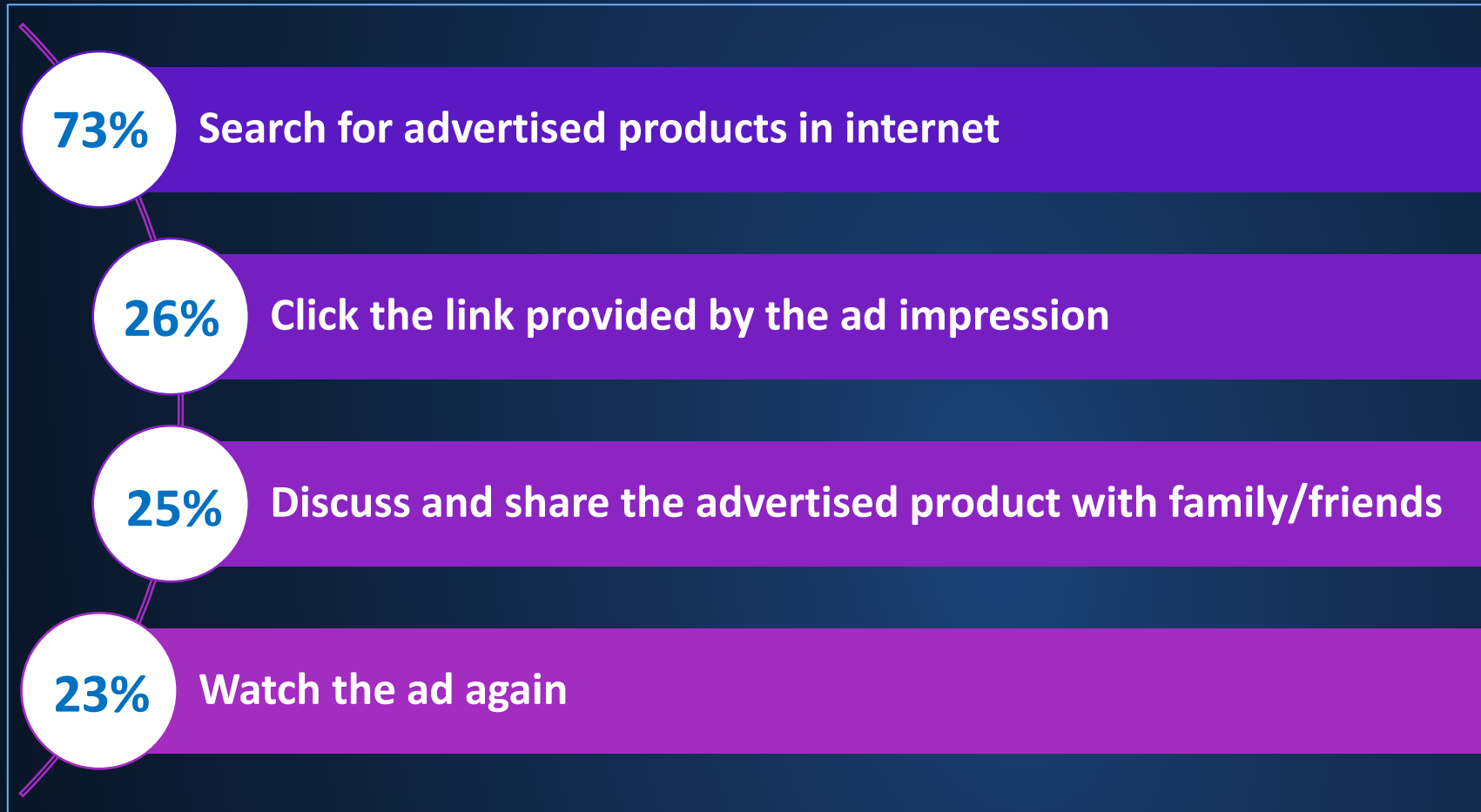


# Reason to Skip The Advertisements on CTV



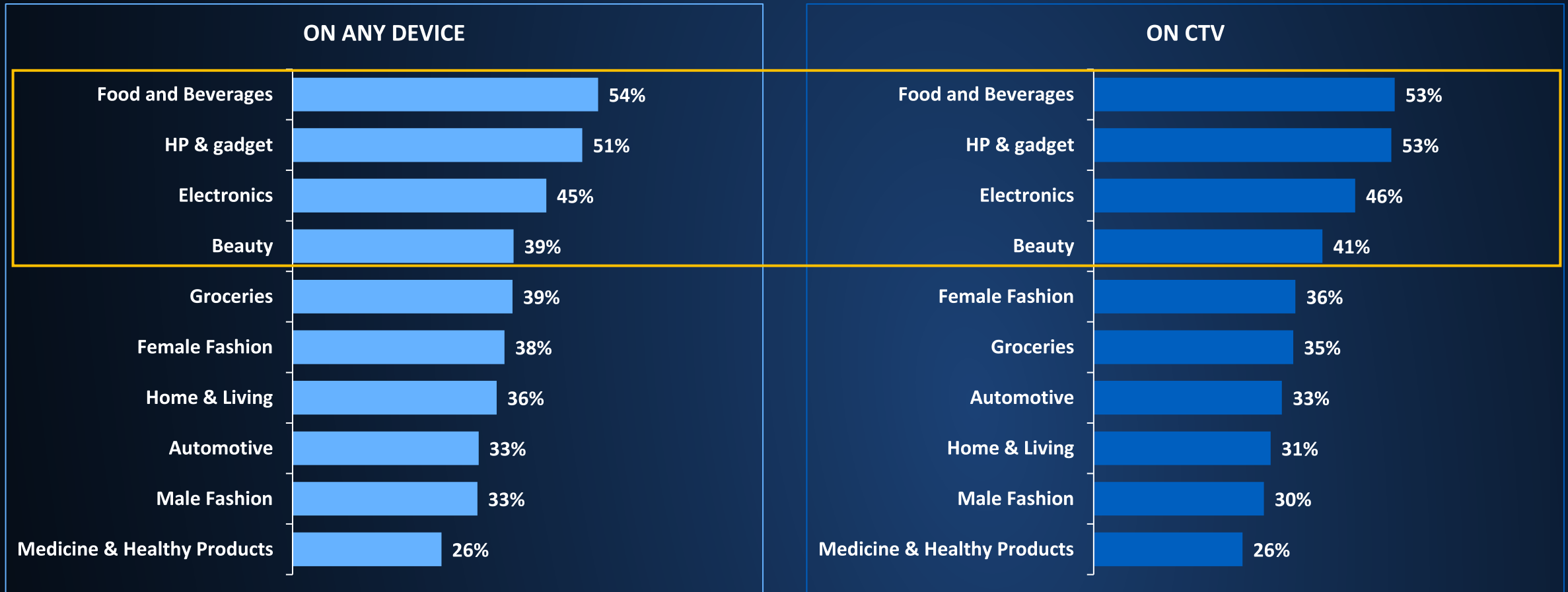
... Because it is too long and not interested with the ad.

# Actions taken if Interested with The Advertisement on CTV



**But if they are interested with the ads, they will seek more information about the product in the internet.**

# Product Advertisements Preferred to Watch on CTV



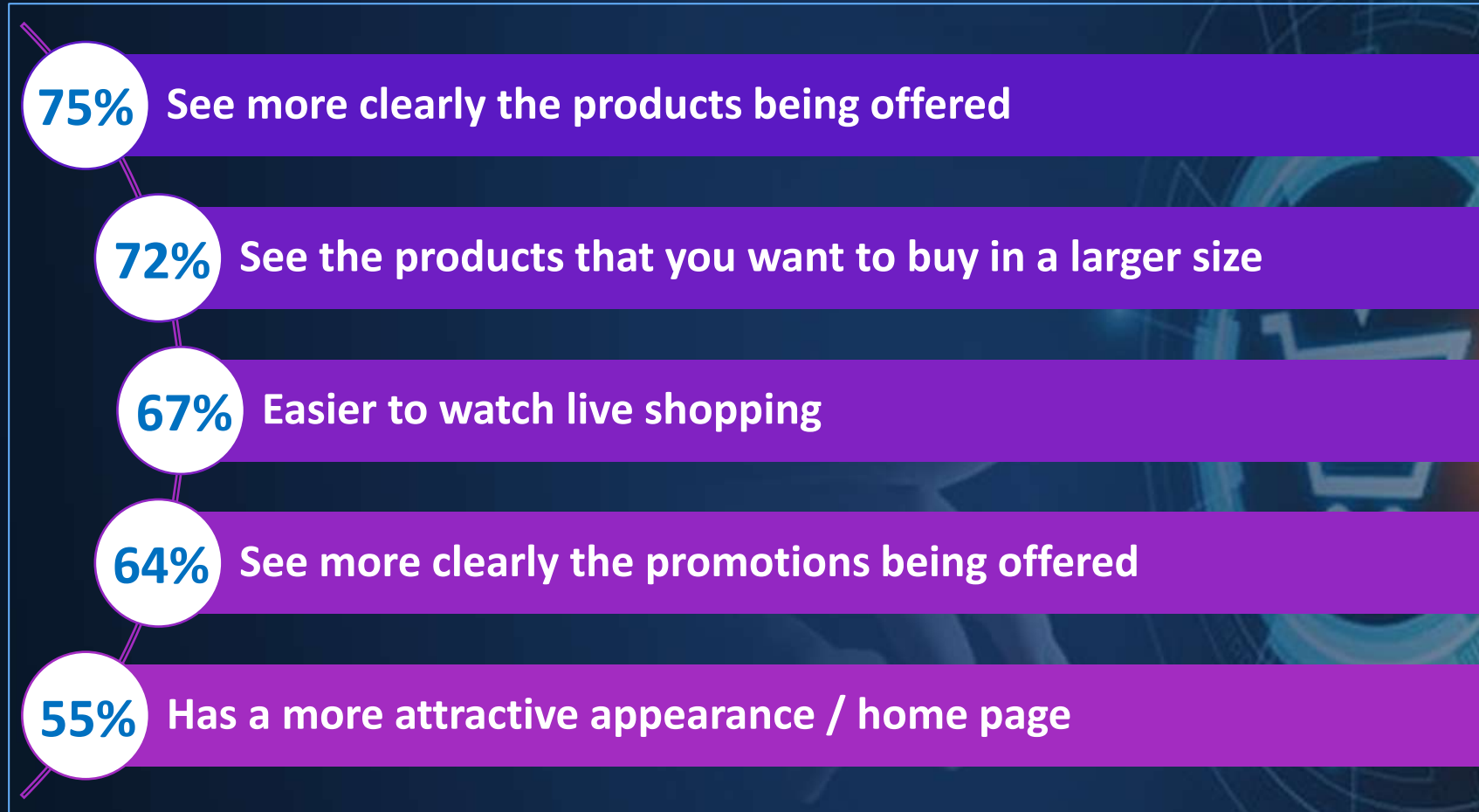
The products they want to see the advertisements on any device or on CTV is somewhat similar.

# E-COMMERCE ON CTV

# FINDINGS – E-commerce on CTV

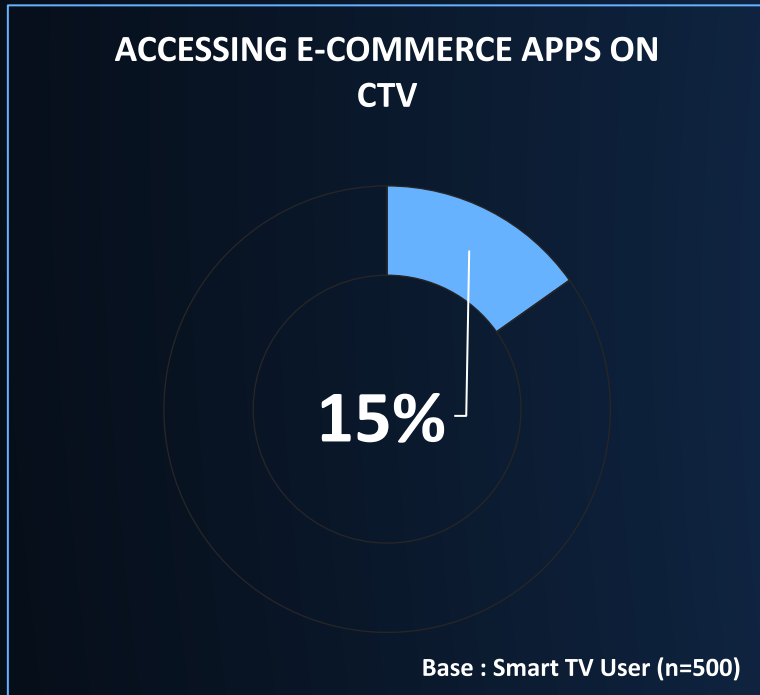
- **15% of the affluent CTV users visiting E-commerce on CTV through web browser.**
- **Shopee and Tokopedia are two most popular E-commerce visited on CTV , where Shopee is visited by 88% of the E-commerce visitors through CTV, while Tokopedia is visited by 76% of them.**
- **83% of E-commerce visitors on CTV, visit the E-commerce at least once a week.**
- **Around 6 of 10 of the E-commerce visitors on CTV, visit the E-commerce when promotion happened (flash sale, payday, live shopping) to get better visual of the promotion.**

# Driver in Using E-commerce Applications on CTV



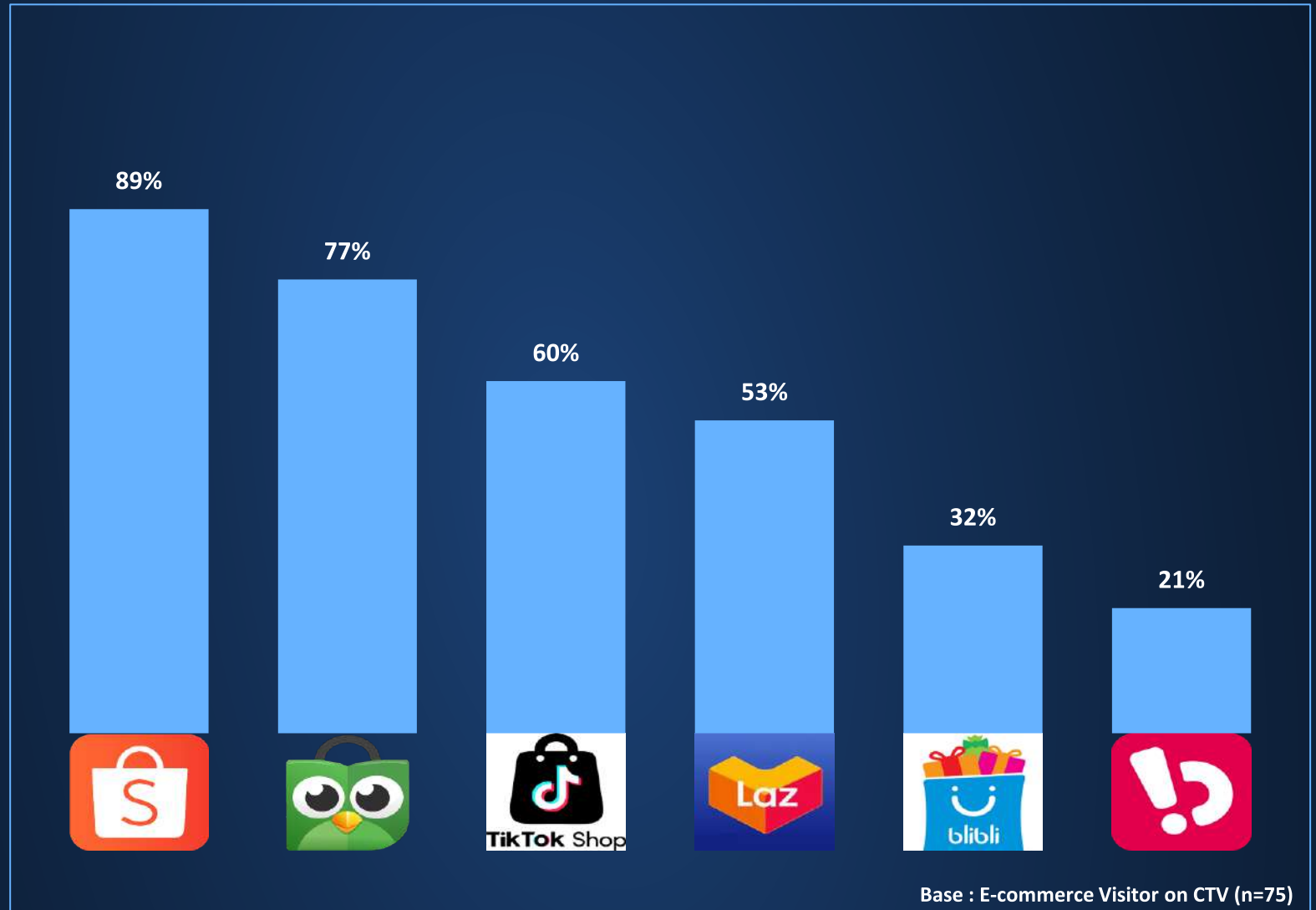
**Better visual is the key driver in using E-commerce applications on CTV.**

# Visiting E-commerce Applications on CTV

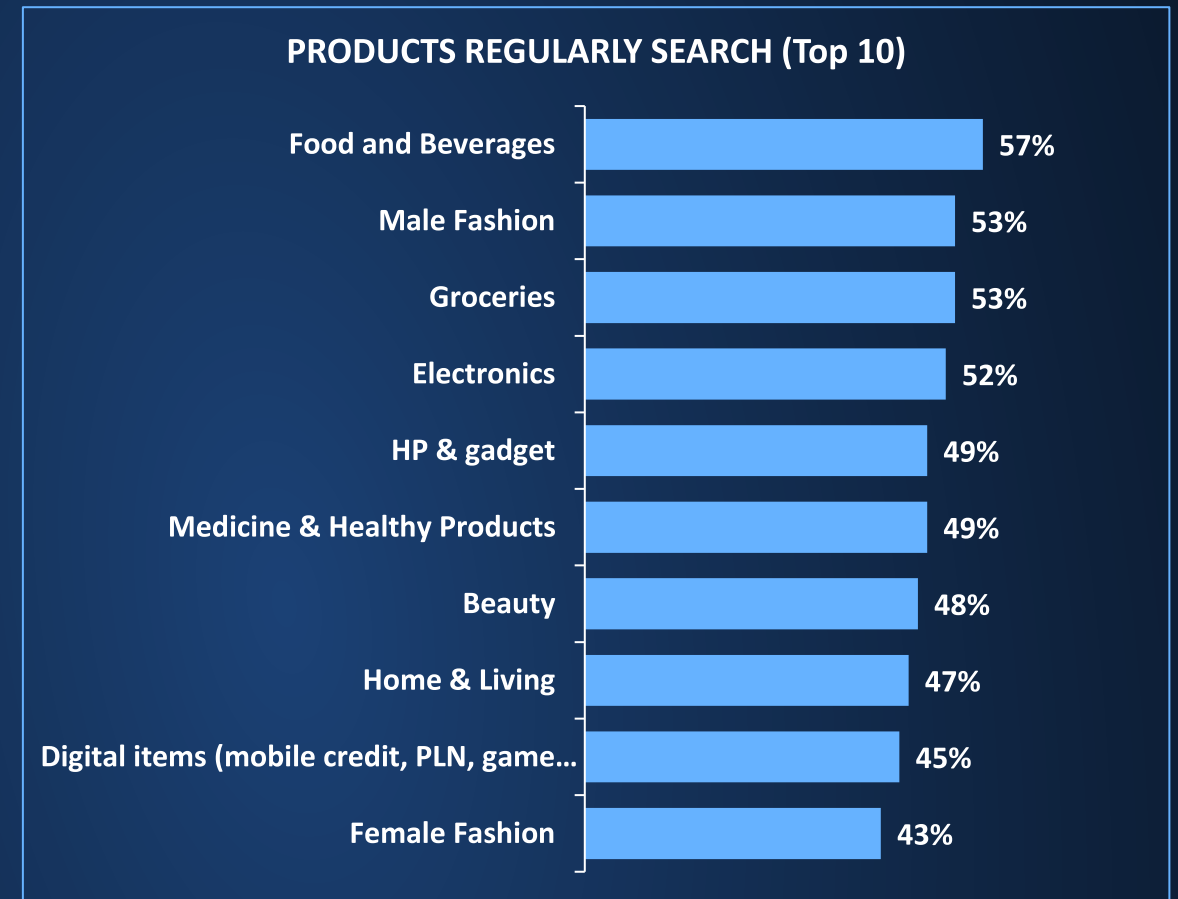
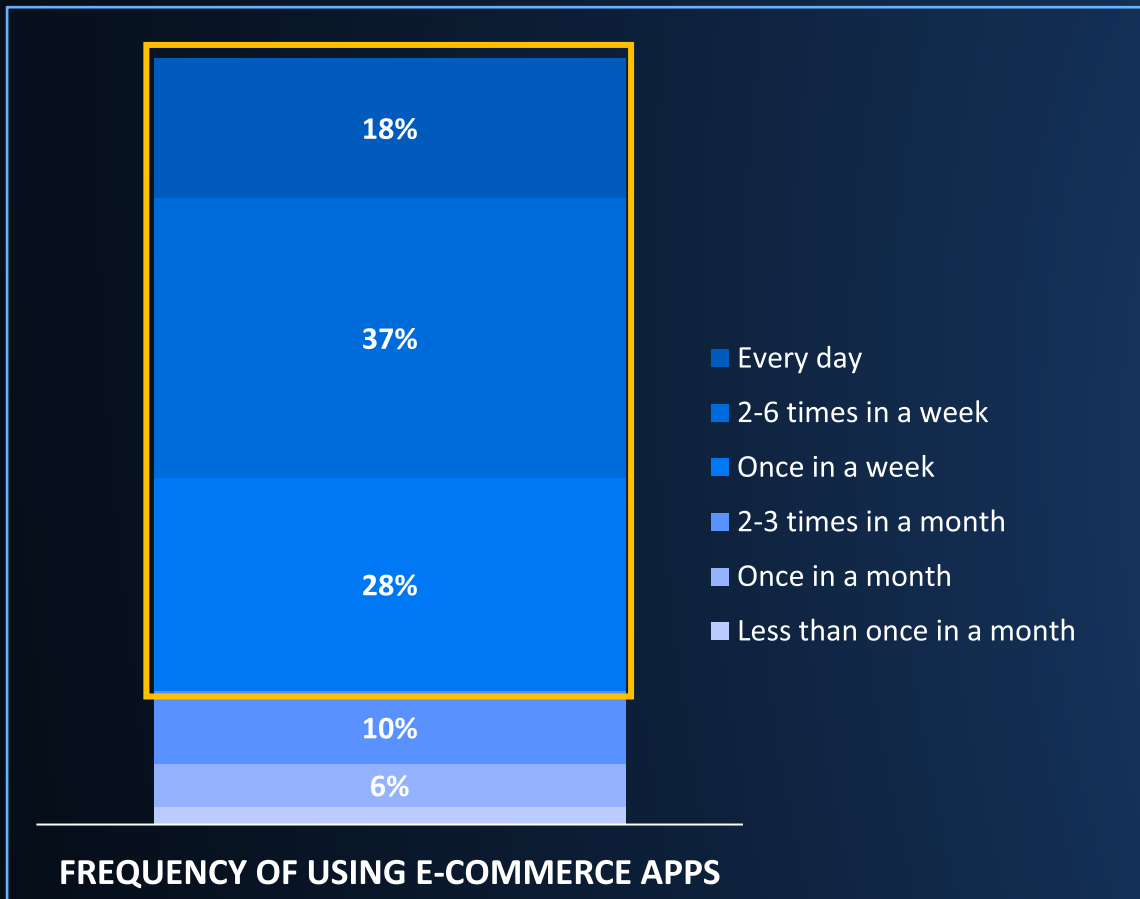


**15% of CTV user like to visit E-commerce application on their CTV through web browser.**

**And most of them like to access Shopee, Tokopedia and TikTok Shop.**



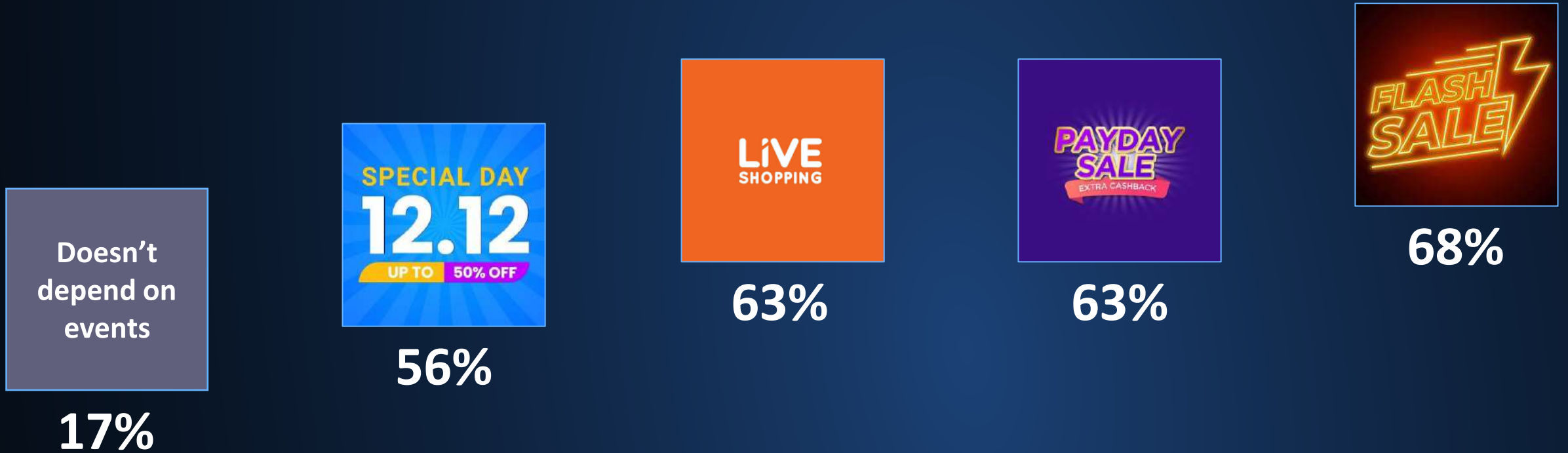
# E-commerce Application Usage



**8 of 10 of them use E-commerce applications at least once a week and most of them are searching for F&B products**



# Shopping Format Regularly Use



Most of them like to take advantage of any promotion campaign, especially the Flash Sale.

# Thank you

