



CTV *Pulse*

2025 UK Consumer & Media Insights



CTV *Pulse*: UK Consumer & Media Insights

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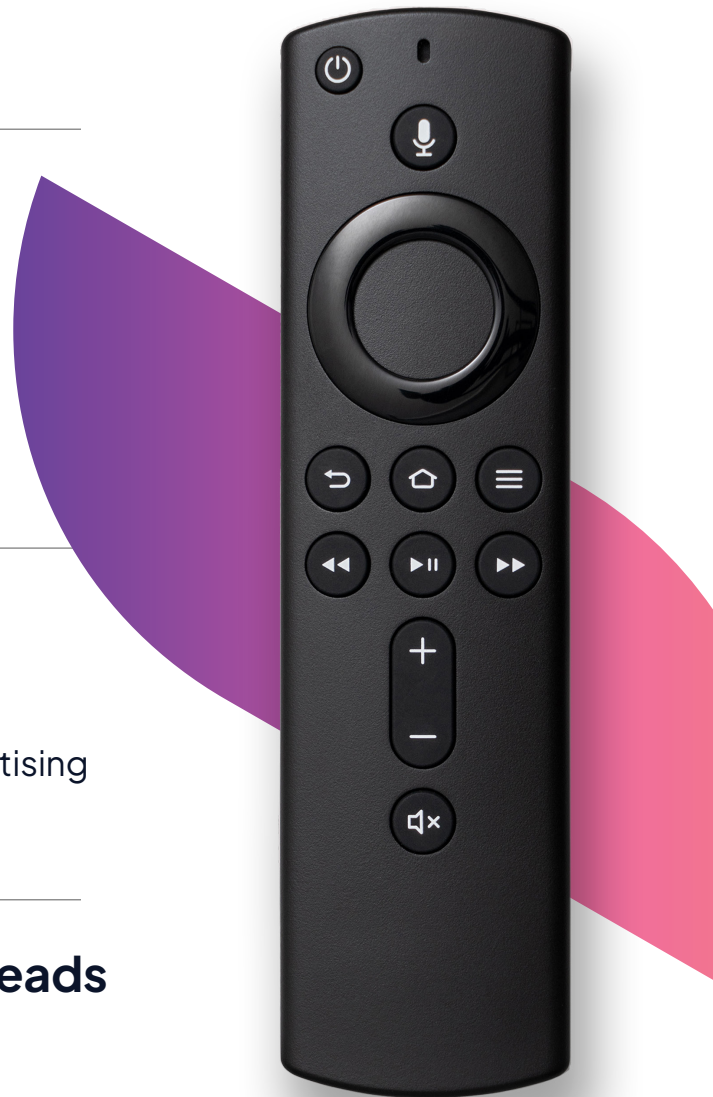
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Accessing UK CTV audiences with Teads



About the report



**Connected
TV (CTV) is
no longer
the future,
*it's the now.***

With more UK households streaming content via smart TVs and internet-enabled devices, traditional linear viewing continues to decline, giving rise to a new TV landscape.

Teads' latest UK CTV Pulse dives into consumer behaviour and attitudes, offering a better understanding of how people are watching TV and how they feel about ads within these environments.

All figures, unless otherwise stated, are from a survey conducted online by YouGov Plc. on behalf of Teads.

Total sample size of consumers was 2,111 adults. Fieldwork was undertaken between 24th and 25th April 2025. The survey was carried out online. The figures have been weighted and are representative of all UK adults (aged 18+).

Total sample size of marketing decision-makers (MDMs) was 503. Fieldwork was undertaken between 24th and 28th April 2025. The survey was carried out online.

Adapting to change in the UK CTV market

Most consumers watching content on a big screen don't know what Connected TV (CTV) is. It goes without saying that unless they work in ad tech or media, they are blissfully unaware that say Netflix went from being SVOD (subscription-based video on demand) service to Hybrid, after introducing ad-supported tiers.

That's why, when we talk about CTV, it's extremely important to keep these different perceptions in mind to gain the right level of insight. This is exactly what we tried to achieve with our 2025 edition of the UK CTV Pulse.

Streaming is growing in the UK. While TV companies in the form of BVOD (broadcaster video on demand) services accounted for 37% of streamed minutes in 2024, as per Barb, our data shows that on par with rising uptake of BVOD, UK viewers are increasingly choosing ad-supported tiers. This is exciting news for advertisers looking for better ways to engage their audiences.

Our findings show that marketers view CTV's main advantages in the ability to reach younger audiences and use advanced targeting. At the same time, it's encouraging to see younger streamers being much more open to using interactive elements in CTV ads, e.g. QR codes or virtual try-ons. This represents a lot of exciting creative opportunities in the space, which we at Teads have been championing together with our Creative Consortium partners.

Another promising opportunity in the UK CTV industry definitely lies in its link with retail. We've seen this with the recent partnership between Roku and Amazon, as well as Walmart's acquisition of Vizio last year.

This is also reflected in our research, as many marketing decision-makers identify retail opportunities as one of the key benefits of CTV. Furthermore, younger consumers seem to be more willing to add items to their shopping basket, while watching a CTV ad, or use voice to activate Alexa skills.

As for the barriers, marketing decision-makers remain concerned about costs, and are increasingly challenged by the quality of programming as well as limited measurement capabilities.

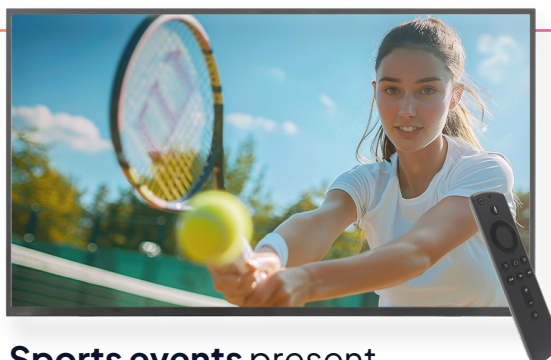
At Teads, we address these challenges by working with a growing number of outstanding supply and measurement partners, as well as by making sure our [Teads Ad Manager](#) platform offers effective tools to manage CTV ad campaigns and optimise them against real outcomes.



Justin Taylor
MD, Teads UK

Key findings

42% of UK consumers prefer **ad-supported streaming services**



Sports events present a major big-screen **advertising opportunity**

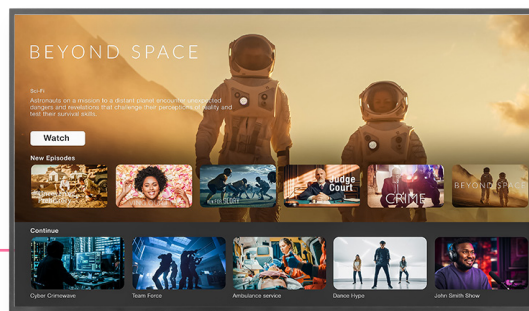


Marketing decision-makers increasingly view reaching **younger audiences** and **advanced targeting** as the main **benefits** of CTV

Younger streamers in the UK are more likely to engage with **interactive features** in CTV ads



The quality of programming is now a close second to **cost** as a **barrier** to CTV investment, according to marketers



UK streaming behaviour



The state of CTV in the UK

Connected Television (CTV) is a subset of over-the-top (OTT) media services, where video content is delivered via the internet and shown on smart TVs, either directly or through set-top boxes, game consoles and streaming sticks.

Although CTV apps usually differ depending on their monetisation method, the introduction of ad tiers in services that originally used to be subscription-based made things more complicated. Today, one app can act as both AVOD (ad-supported video on demand) and SVOD (subscription-based video on demand), which is often referred to as Hybrid.

Our survey shows that the growing number of viewers in the UK (+7% YoY) are choosing ad-supported tiers when watching content, opening up more opportunities for traditional InStream ads on CTV.

This is followed by broadcaster video on demand app viewership, which grew by 6% in 2025 compared to 2024, and reached 36%, as well as traditional subscription-based video on demand, which is down by 1% in 2025.

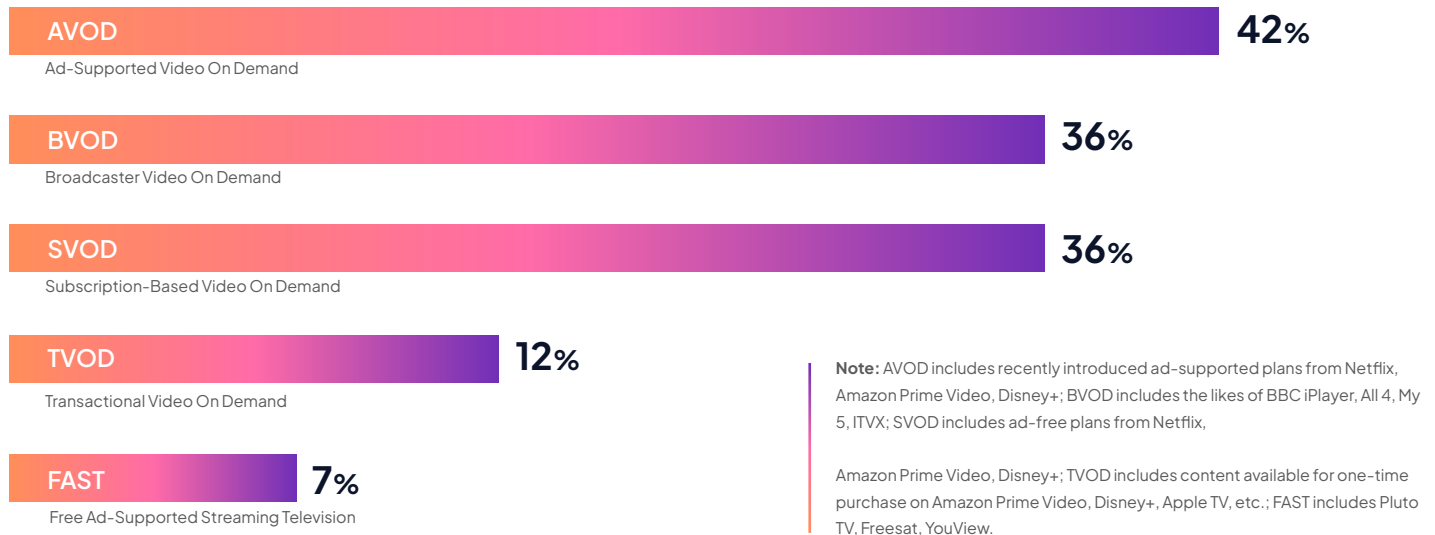
Ad placements in both of these environments are not available (or almost not available) to bid on for the vast majority of advertisers. As a result, the most effective way to reach those audiences is via CTV HomeScreen, which captures viewers when their content discovery begins.

+7% YoY

of UK viewers are choosing
ad-supported tiers when
watching content

Ad-supported CTV leads viewer preferences in the UK

CTV APP TIERS IN THE UK



“In a world where attention has increasingly become a commodity, driven by the fragmented nature of the digital space, TV remains a powerhouse for delivering captive audiences, whether the content is streamed or broadcast.

“It’s clear that ad-supported streamed TV is becoming foundational for building brand equity, as more UK households stream content on smart TVs and internet-enabled devices, while traditional linear viewership continues to decline.

“Consumers’ preference for ad-supported platforms, combined with the ability to engage younger audiences, creates new opportunities for advertisers to build brands across screens.”



Dan Black
Head of CTV, Teads UK



Implication for marketers: Ad-supported CTV offers both reach and receptivity. By tapping into these environments, brands can access premium content placements without premium price tags.

UK streamers are very content-led, meaning they often subscribe to certain services just to watch that one TV show and end up staying, sometimes because they found something else they want to watch, or simply because they keep intending to check the catalogue before deciding to unsubscribe.

The introduction of cheaper ad-supported tiers is definitely a contributing factor to the fact that the majority of UK households are subscribed to multiple streaming services at once, giving them more entertainment options at their fingertips.

CTV implies that, regardless of the input, the output is always presented on a smart TV, making these devices the core of the CTV ecosystem.

The affordability of smart TVs in comparison to other devices — for instance Hisense 40" Inch Full HD smart TV versus the Amazon 7" Kindle Paperwhite — is impressive and definitely makes having a smart TV in a living room a norm for many.

In terms of brand favourability, Samsung keeps leading the UK charts, with LG being a strong second, followed by Sony, Panasonic and Hisense.



61%

of UK households are subscribed to 1–3 streaming services

75%

UK households have a smart TV



Source: IAB UK Compass

“As the CTV landscape matures and audiences continue to shift how and where they stream, programming quality has become just as critical as cost in shaping CTV investment decisions. Tubi’s growth highlights the effectiveness of free, culturally relevant, ad-supported television in engaging today’s viewers. It is also a clear signal that ad-supported streaming is becoming a central part of the modern media ecosystem.”

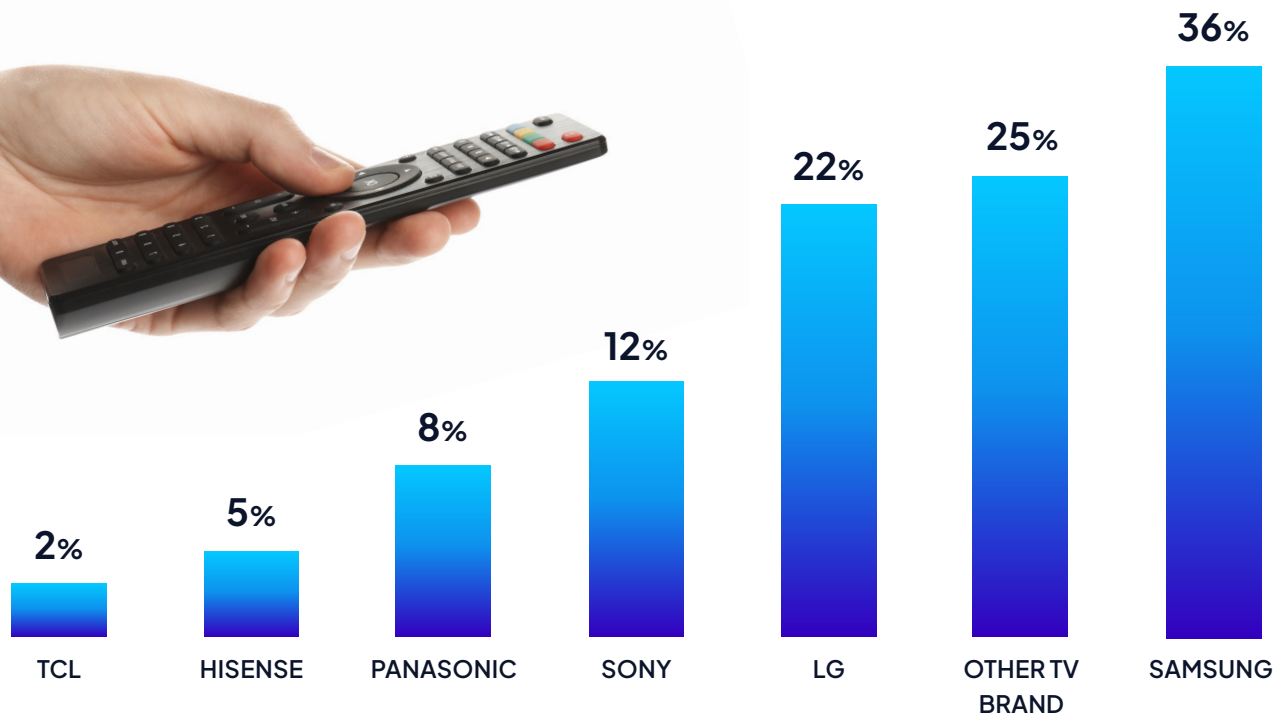


Paul Gubbins

VP Sales & Programmatic Partnerships, Tubi UK

Trends in smart TV ownership and content consumption

SMART TV OWNERS BY BRAND



Source: Global Web Index Q1 2024–Q4 2024, UK data (40,000 respondents)

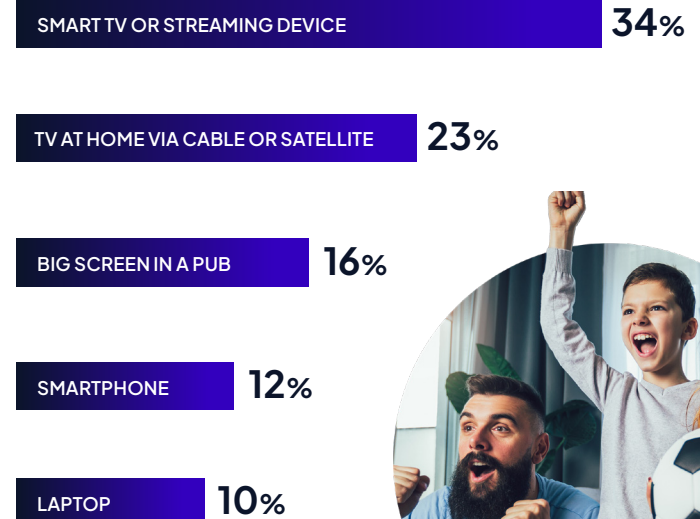
Content consumption trends

Given the co-viewing nature of CTV, it's not surprising that the key big screen moments are strongly connected to cultural events, such as sporting tournaments, movie and TV show releases.

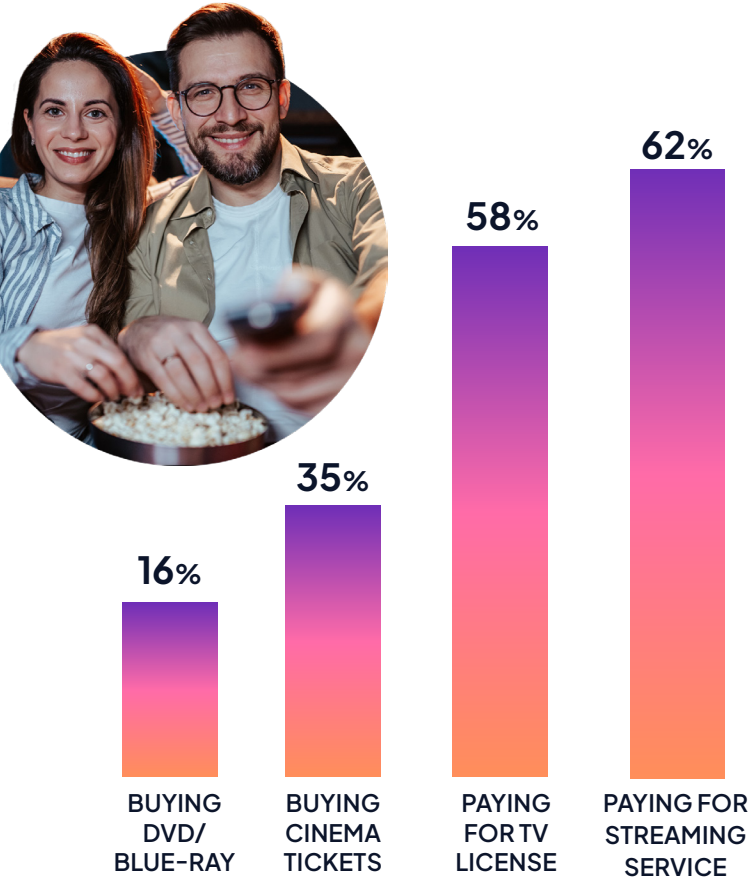
2025 is shaping up to be an exciting year for sports fans, with events like The Ashes, the Women's Rugby World Cup and many others. The overwhelming majority (73%) of UK viewers prefer watching sports on a big screen, with 34% of viewers across all age groups opting for watching via a smart TV, set-top box or streaming device at home.

However, preferences vary by streamers' age, as a third (33%) of 18–24-year-olds opt for watching sports on smartphones, which is essential to factor in for ad campaigns with strict targeting.

TOP SCREENS FOR VIEWING SPORTS



FILM VIEWING HABITS IN THE UK



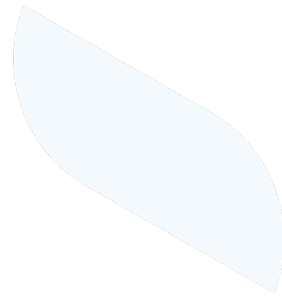
Source: YouGov: Data from 15 January 2025, based on responses from 1890–2039 of UK adults per wave

Big screen entertainment goes beyond sports.

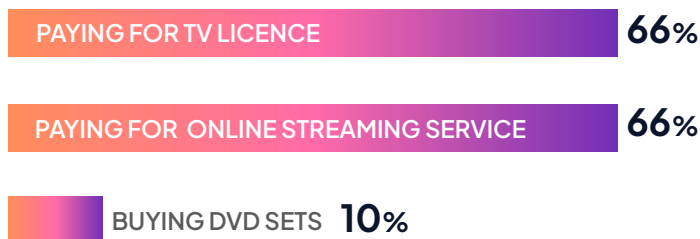
2025 has already been very eventful in terms of movie premieres. Mission: Impossible – The Final Reckoning, How to Train Your Dragon, Captain America: Brave New World, Jurassic World Rebirth and 28 Years Later, The Fantastic Four: First Steps have already been released in cinemas so far, with other notable releases on the horizon, such as Wicked: For Good and Avatar: Fire and Ash.

Movies become available on streaming platforms soon after they run in cinemas. So, consumers are looking to catch up on missed hits or rewatch favourites from the cinema world, which opens up numerous ad opportunities for advertisers on smart TVs.

In fact, according to YouGov, when it comes to watching films, more people in the UK prefer to pay for online streaming services than for a TV licence (the latter saw a 9% decrease compared to 2024).



TV SHOW VIEWING HABITS IN THE UK



Source: YouGov: Data from 15 January 2025, based on responses from 1890–2039 of UK adults per wave

From new seasons of Stranger Things, Slow Horses and Squid Game to White Lotus, Severance and The Bear, TV show producers are keeping streamers both busy and entertained.

This offers advertisers opportunities to capture viewers' attention when they are most engaged binge-watching shows through the variety of ad-supported apps via inStream video ads and ad-free channels using HomeScreen placements on CTV.



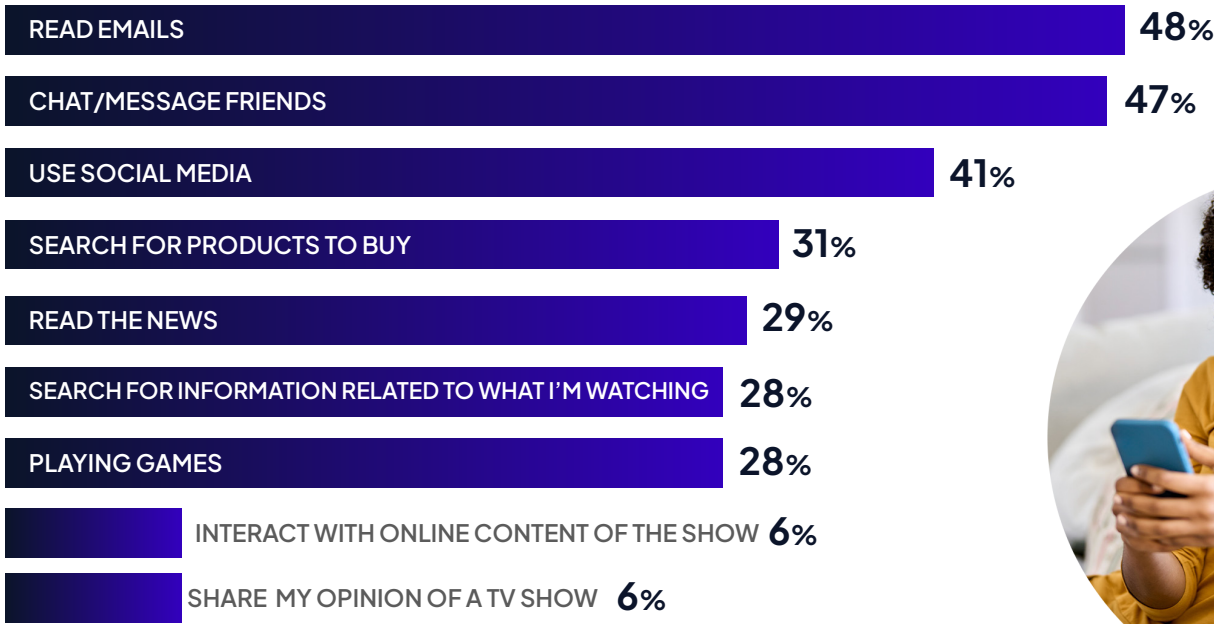
Implication for marketers: Linear TV is no longer the dominant medium. Brands must prioritise streaming environments in their video strategies to ensure they remain visible and relevant.

Omniscreen viewing experiences

Aiming to multitask and stay up to date with what’s going on in the world while also digitally connected to friends and family members, UK consumers have become truly omniscreen.

As most living rooms don’t have a stay off your phone sign, second screen activities, whether reading emails, talking to friends or scrolling social media feed, often happen in the background of primary TV content consumption.

SECOND SCREEN ACTIVITIES



Source: Global Web Index Q1 2024–Q4 2024, UK data (40,000 respondents)

TV remains the most used device for streaming, with 70% of UK consumers choosing it for on demand content.

As for mobile phones, they lead among second screen devices with 69% of UK consumers admitting they regularly use their phones as a secondary screen.

This environment creates a unique ad opportunity for creative ad delivery across different channels. An inevitable side effect of second screening is shortened attention spans. This is exactly where interactivity can come into play.

DEVICES USED FOR STREAMING ON DEMAND CONTENT



SECOND SCREEN DEVICES



Source: Global Web Index Q1 2024–Q4 2024, UK data (40,000 respondents)



Implication for marketers: Linear TV is no longer the dominant medium. Brands must prioritise streaming environments in their video strategies to ensure they remain visible and relevant.

Tapping into interactivity in CTV

Interactive features undoubtedly distinguish CTV ads from linear and bring digital creative innovations from the digital world to the living room.

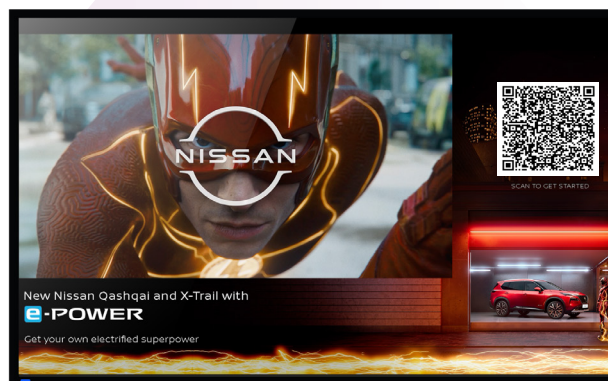
But no matter how innovative and skillful your creative teams are, interactive features are only as good as the number of consumers who are happy to engage with them.

Our data shows that 10% of UK viewers are willing to scan a QR code in a TV ad, while other interactive features appear even less appealing to most users.

The situation looks very different when it comes to younger audiences, as they seem to be much more open to engage with virtual try-ons or activate a brand's Alexa skill while watching an ad on a big screen.

What's more, 15% of 18–24-year-olds and 14% of 25–34-year-olds in the UK are willing to add products to a shopping basket using interactive features in CTV ads. For advertisers looking to better connect with younger audiences, this could be a game-changer.

10% of UK viewers are open to scan a QR code in TV ads



“ *It's clear that younger audiences want to engage actively with the content they see on Connected TV, but what's less well-known is that personalisation with audio remains the most powerful driver of that engagement.*

“Studies have shown that dynamically tailoring voice, message and sonic branding to each viewer's context makes ads feel directly relevant, and AI audio personalisation accelerates brands' ability to do that.

“This not only enhances brand connection, but it also primes audiences to engage with interactive features like QR codes, virtual try-ons, or voice commerce. Audio personalisation turns passive viewing into an experience that feels spoken just to you — creating cut-through, deeper attention and higher conversion.”



Zoe Poulson
Director of Business Development,
Agency & AdTech UK/EU,
Audiostack

Openness to engage with interactive features in TV ads

18-24-year-olds



Scan a QR code

24%



Virtual try-on

23%



Use Alexa to engage with a brand

21%



Add products to a shopping basket

15%

25-34-year-olds



Add products to a shopping basket

14%



Scan a QR code

12%



Virtual try-on

11%



Use Alexa to engage with a brand

8%

35-44-year-olds



Scan a QR code

9%



Add products to a shopping basket

8%



Use Alexa to engage with a brand

6%



Virtual try-on

5%

45-54-year-olds



Scan a QR code

9%



Add products to a shopping basket

5%



Use Alexa to engage with a brand

4%



Virtual try-on

3%

55+



Scan a QR code

6%



Add products to a shopping basket

2%



Virtual try-on

1%



Use Alexa to engage with a brand

1%

UK media buyer mindset

CTV ad spend

CTV ad investments in the UK are set to surpass 2 billion pounds in 2025, making it one of the fastest growing CTV markets in Europe.

Yet, our data highlights that 58% (down from 61% in 2024) of marketing decision-makers say they never include CTV advertising in the marketing strategy. So, there's definitely room for improvement when it comes to maximising the potential of CTV in the UK.

On a more positive note, an increasing number of large companies (+14% YoY) say they always include CTV in their marketing strategy, which is a testament to the return of CTV investments these companies have seen in previous years.

CONNECTED TV AD SPEND IN THE UK

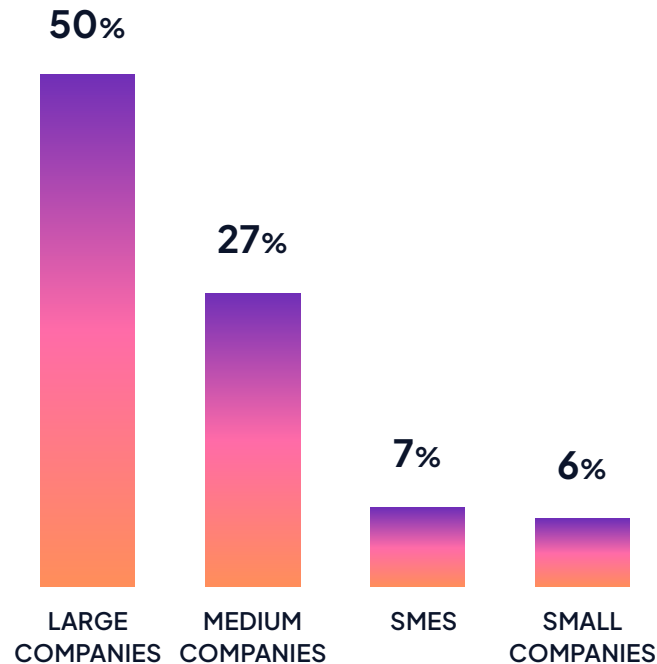
2023	2024	2025
£1.57 B	£1.87 B	£2.20 B
2026	2027	2028
£2.49 B	£2.75 B	£3.01 B

Note: Digital advertising that appears on connected TV (CTV) devices; includes display ads that appear on home screens and in-stream video ads that appear on CTVs from platforms like BVOD services and YouTube; network-sold inventory from traditional linear TV and addressable TV advertising

Source: eMarketer, November 2024

Scaling CTV investments across business sizes

ALWAYS INCLUDE CTV ADVERTISING
IN THE MARKETING STRATEGY



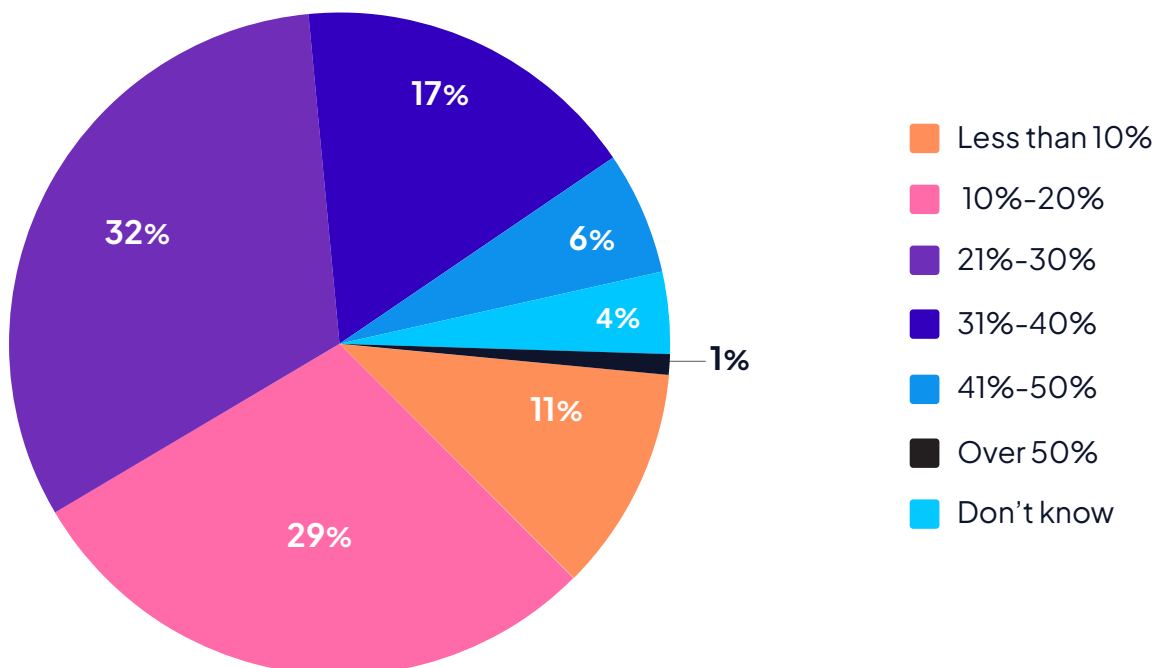
Note: Small companies (10–49 employees); medium companies (50–249 employees); SMEs (1–249 employees); large companies (250+ employees)

How do these trends translate into advertising plans? Our data reveals that almost a third (32%) of marketing decision-makers (mainly from SMEs, medium and large companies) allocate 21%–30% of ad impressions to CTV. This is followed by 29% of those who allocate between 10% and 20%, primarily driven by small and micro businesses.

While there's progress in investment from larger companies, it's clear that smaller businesses may need additional encouragement to allocate bigger shares of impressions to CTV, like CTV [self-serve buying options](#).



ALLOCATING AD IMPRESSIONS TO CTV



Benefits and barriers to investing in CTV advertising

To understand the reasons behind investing in CTV, it's essential to explore marketers' perceptions of the channel. Our data showcases that more marketers value CTV's ability to reach younger audiences (+20% YoY) on the big screen and advanced targeting and contextual mapping capabilities (+20% YoY).

Furthermore, 37% of marketers cite access to quality content as CTV's advantage, as well as 34% name retail opportunities and 32% identify CTV's ability to reach light linear views* as its key benefits.

When it comes to barriers to allocating bigger budgets, cost remains the main concern for marketers (+5% YoY), followed by a growing number of those who find quality of programming on CTV (+13% YoY) and limited measurement capabilities (+11% YoY) particularly challenging.

Admittedly, 20% of marketing decision-makers see the lack of understanding of CTV a key barrier to investing more. Therefore, addressing this via thought leadership sessions and knowledge sharing could also bring tangible benefits.

*Viewers that are hard to reach with ads

“

Cost and quality are always co-dependent. Brands seeking direct response / outcomes-based buying may well overlook some of the quality aspects if they are getting the returns they expect from their activity. But as always, it's not a one-size-fits-all approach. I think the generic use of the term 'CTV' isn't super useful as brands will seek to use different formats and approaches and partners across the CTV ecosystem to achieve different goals. It's boring to say but CTV has a major taxonomy and naming conventions challenge globally and it needs to resolve it, so advertisers are clear which formats/environments etc. they are actually buying when they sign off 'CTV' and can link the activity more clearly to their communications architecture.”



Jon Waite

EVP, Global Head of Planning,
Havas Media Network London



Implication for marketers: CTV is not just TV with internet pipes. It's a hybrid of digital efficiency and TV impact—a must-have in the modern media plan.

Benefits: Top 5 advantages of CTV advertising



ABILITY TO REACH YOUNGER AUDIENCES

38%



ADVANCED TARGETING AND CONTEXTUAL MAPPING CAPABILITIES

38%



ACCESS TO QUALITY CONTENT

37%



RETAIL OPPORTUNITIES

34%



ABILITY TO REACH LIGHT LINEAR VIEWERS ON THE BIG SCREEN

32%

SMALL COMPANIES



40%

40%

36%

32%

32%

Ability to reach younger audiences

Retail opportunities

Ability to reach light linear viewers

New creative capabilities

Add incremental reach to linear TV

MEDIUM COMPANIES



59%

38%

37%

33%

33%

Access to quality content

Ability to reach younger audiences

Advanced targeting and contextual mapping

Ability to reach light linear viewers

Retail opportunities

SMEs



36%

35%

33%

32%

30%

Retail opportunities

Access to quality content

Ability to reach younger audiences

Ability to reach light linear viewers

Advanced targeting and contextual mapping

LARGE COMPANIES



50%

44%

39%

35%

33%

Advanced targeting and contextual mapping

Ability to reach younger audiences

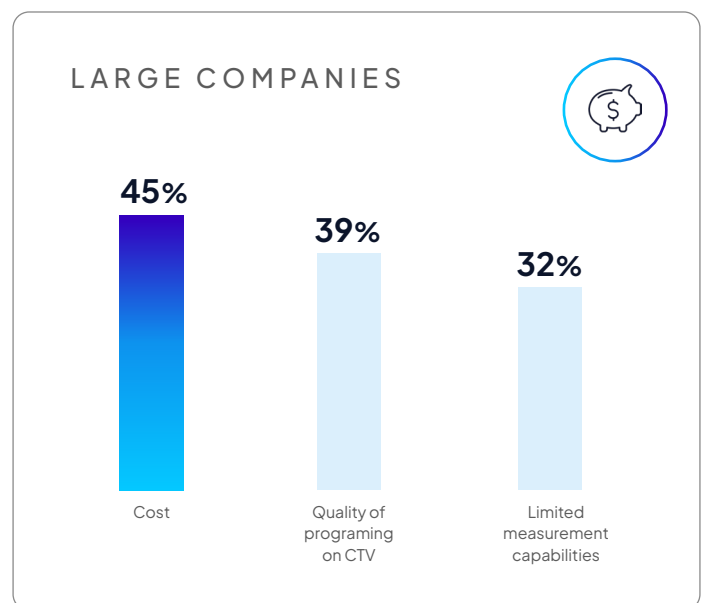
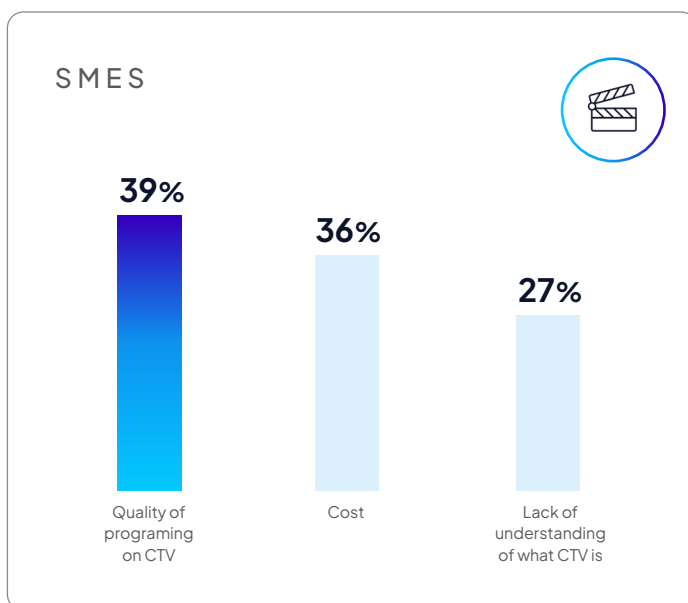
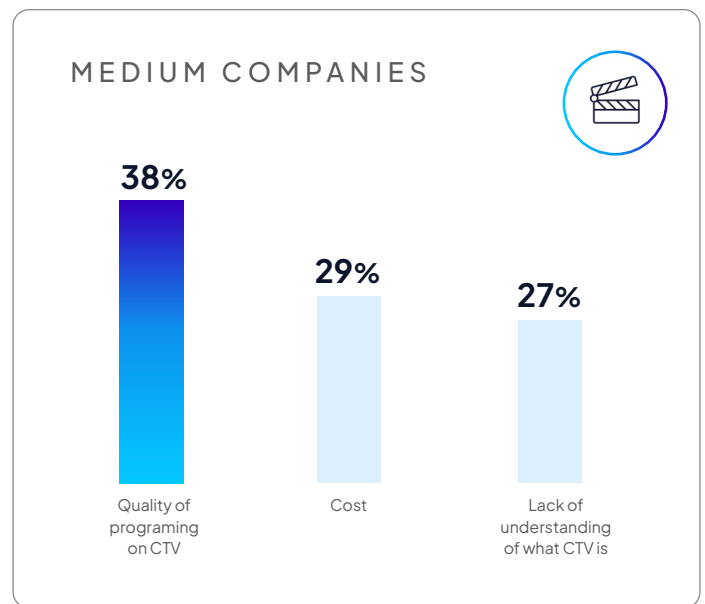
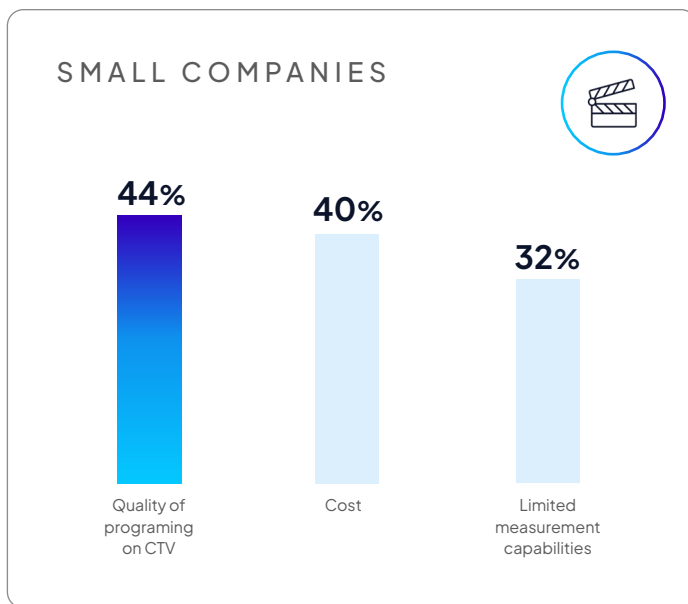
Access to quality content

New creative capabilities

Tangible ROI

Note: Note: Small companies (10–49 employees); medium companies (50–249 employees); SMEs (1–249 employees); large companies (250+ employees)

Barriers: Top 3 barriers to investing in CTV advertising



Note: Small companies (10–49 employees); medium companies (50–249 employees); SMEs (1–249 employees); large companies (250+ employees)

CTV measurement capabilities

CTV measurement continues to be top of mind for marketing decision-makers, given that traditional TV metrics don't fully capture the nuances of CTV viewing, especially in app-based and shared-screen environments.

In fact, 26% of them cite measurement as one of CTV's advantages, whereas 28% name measurement as a barrier to investing in CTV. While this may seem somewhat contradictory, the reality is that marketers appreciate the existing measurement capabilities, but are seeking further advancements to increase their investments.

Specifically, 53% of marketing decision-makers are interested in ROI measurement, 45% are looking for better attention measurement, whilst 44% would consider increasing their CTV ad spend if offered improved cross-screen effectiveness and sales impact measurement.

These insights provide clear guidance for ad tech companies, particularly in the measurement space, to take on board for their product roadmaps. At the same time, they highlight key pain points which, if addressed, could lead to more successful CTV partnerships.



Implication for marketers: Measurement must evolve. In a study conducted by *Ascentinel on the video market in the UK, Teads outperformed Netflix at delivering business outcomes including brand awareness and sales impact. Omnichannel planning and outcome-focused metrics will be essential to prove the value of CTV in a cross-media world.

* Ascentinel, Video Study, May 2025

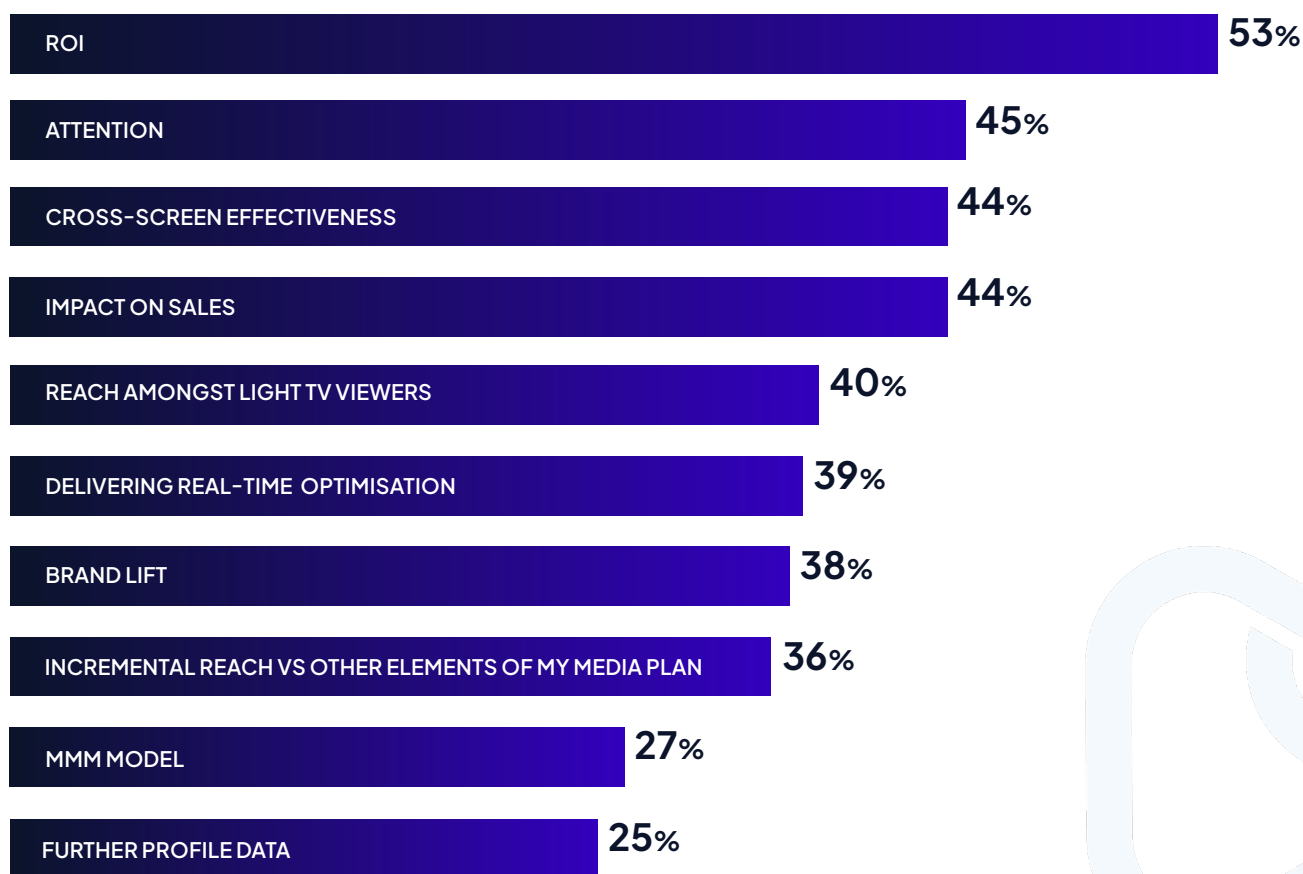
“*I'm more excited about the ability to measure audiences holistically across screens and services than I am about measuring the isolated effectiveness of CTV on its own. Marketers need to learn from the mistakes of the last 15 years and not jump in based on bad attribution modelling techniques or making decisions based on singular interactions. CTV forms an important part of the communications mix, but as ever its impact should be assessed as part of a full funnel holistic measurement approach across all touchpoints.*”



Jon Waite

EVP, Global Head of Planning,
Havas Media Network London

INCREASING AD INVESTMENTS WITH CTV MEASUREMENT ADVANCEMENTS



Conclusion

CTV is rewriting the rules of video consumption in the UK. It merges the scale and storytelling power of traditional TV with the agility, targeting and measurement of digital.

For advertisers, this is a golden opportunity to create smarter more engaging campaigns that align with evolving viewer behaviours and expectations.

The time to act is now. Brands that embrace CTV today will be the ones winning attention, trust and impact in 2025 and beyond.

Accessing UK CTV audiences with Teads

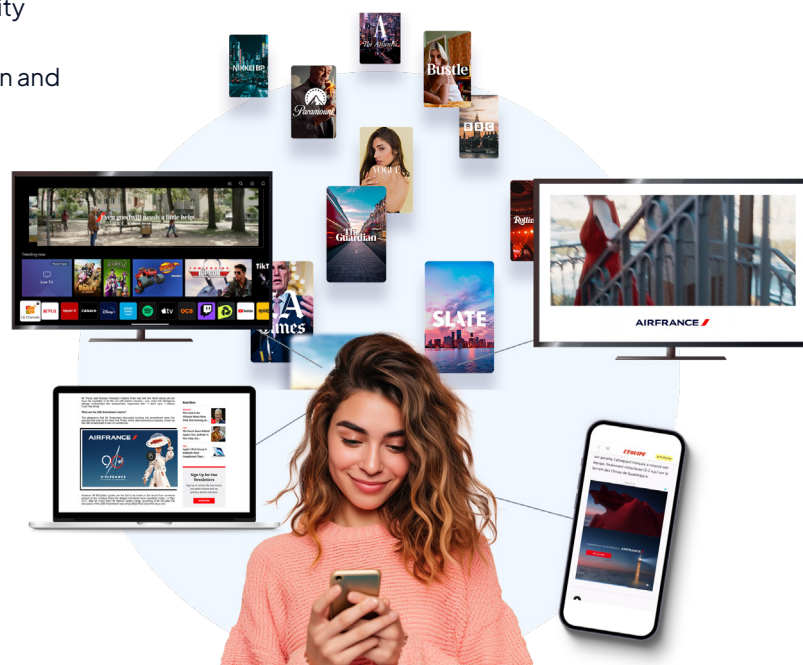
Most CTV services require consumers to log in, creating the expectation of a highly addressable environment where advertisers can leverage identity-based solutions to reach their audiences effectively. In reality, advertisers are often limited by what's provided by publishers in the bidstream.

At Teads, we see billions of impressions on a daily basis and have established that the majority of programmatic CTV impressions don't have any usable audience targeting information.

With this in mind, we've launched Teads Audiences for CTV, bringing years of audience expertise and intelligence to television and helping advertisers find scaled audiences on the largest screen in the house. This enhanced capability builds on the success of our CTV Contextual Genre targeting and offers a more comprehensive way to plan and activate omnichannel campaigns.

Teads Audiences for CTV mirror those available on desktop and mobile, forming the basis of having '[One Audience Everywhere](#)'. Users of [Teads Ad Manager](#) are presented with a consistent taxonomy of audiences across all screens, providing targetable reach against the most valuable consumers, enabling a true omnichannel buy.

Furthermore, Teads Omnichannel Reach Planning tool measures CTV's potential as a driver of incremental reach beyond linear TV campaigns, making it a powerful addition to the video media mix.

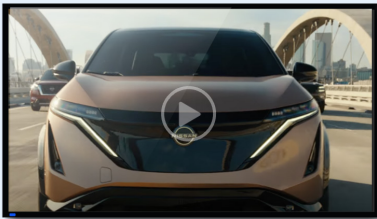


Teads unlocks growth opportunities across screens



CTV HomeScreen

Teads' CTV HomeScreen provides seamless homescreen ad experiences, reaching non-ad-supported audiences on premium OEMs through impactful homepage takeover units. This solution ensures high visibility and engages audiences in a premium, brand-safe environment.



CTV InStream

Teads' InStream unit revolutionises ad placement by seamlessly integrating video and display ads within premium editorial content. It ensures a non-intrusive, user-friendly experience by only playing when in view, maximising attention and engagement. With advanced targeting and measurable outcomes, InStream delivers impactful results across devices.



OTT Video

Teads' OTT video delivers premium ads on Connected TVs, combining the reach of television with digital precision. With contextual targeting and seamless omnichannel integration, it ensures impactful storytelling and measurable results.

Want to learn more about Teads' omnichannel solutions?

[CONTACT US](#)