

Placed to be: the market for product placement

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YouGov analysis of consumer attitudes in the United Kingdom and United States



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Introduction

Product placement - the name given to the deliberate and paid-for inclusion of branding into a work of media - is a burgeoning market in the media industry. It has seen continued explosive growth over the course of the last decade as its integrated nature has insulated it from the tectonic shifts in the ways we consume media. But despite the fact that the appetite to strike product placement deals is both large and growing, it has remained unclear just how popular product placement is with the audiences that experience them. For every anecdotal story of a consumer being compelled to purchase a product following its appearance in the hands of a Hollywood star, there is another of a resentful viewer distracted from the plot by a clumsily placed product. Meanwhile, others simply don't notice product placement at all. In this whitepaper, YouGov measures just how effective this increasingly popular form of advertising is among consumers. It examines consumers' attitudes towards product placement and their journey from awareness and perception to consideration to support for this type of advertising. The research was conducted in the United States and United Kingdom using **YouGov Direct** in August 2021.



*The recent creation of **YouGov Safe** has fundamentally changed the landscape for research into the media industry. Ratings for streaming services have traditionally been kept under close guard by the platforms that host the content, but thanks to **YouGov Safe** are now possible to access. One of the most exciting prospects for this rich new data is its use to support firms and studios involved in product placement, a form of marketing that has flourished over the last decade. We are delighted to be positioned to support the product placement industry moving forwards, starting with the research we're publishing today. Keep an eye out throughout this whitepaper for my 'expert view', where I'll add colour to some of the data we see.*



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Background

The 21st century brought with it the advent of the smartphone, the smart television, and a myriad of other 'intelligent' devices that have accelerated dramatic changes in the ways that people consume media. On the journey from boxy TVs, all the way up to smartphones, the internet age has revolutionised our ability to consume content with ease and from anywhere. But just how often are people consuming content in 2021?

This chapter examines consumer habits with regards to consumption of shows and movies in the home, while also looking at which providers of this content have created the most popular platforms amongst British and American consumers.

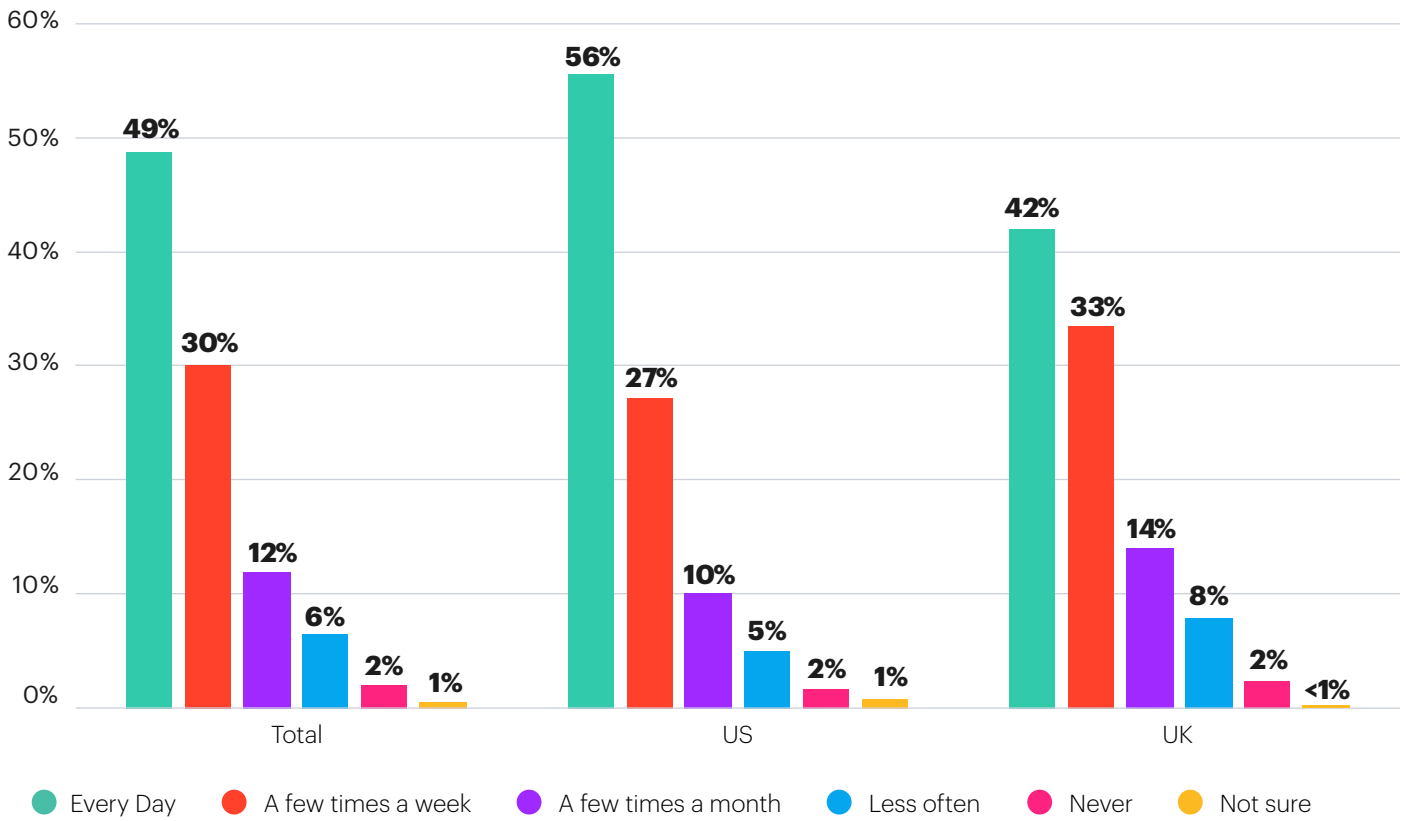
Measuring the potential reach of product placements in shows and movies

Consumers watching shows or movies every day at home make up on average **49%** of our study, though this figure was slightly higher in the United States (**56%**) than it was in the

United Kingdom (**42%**). Almost four in five consumers across both markets watch a few times a week or more, indicating the place that this type of media continues to enjoy in our lives.

Frequency of shows and movie consumption among US and UK adults

% of adults in each market

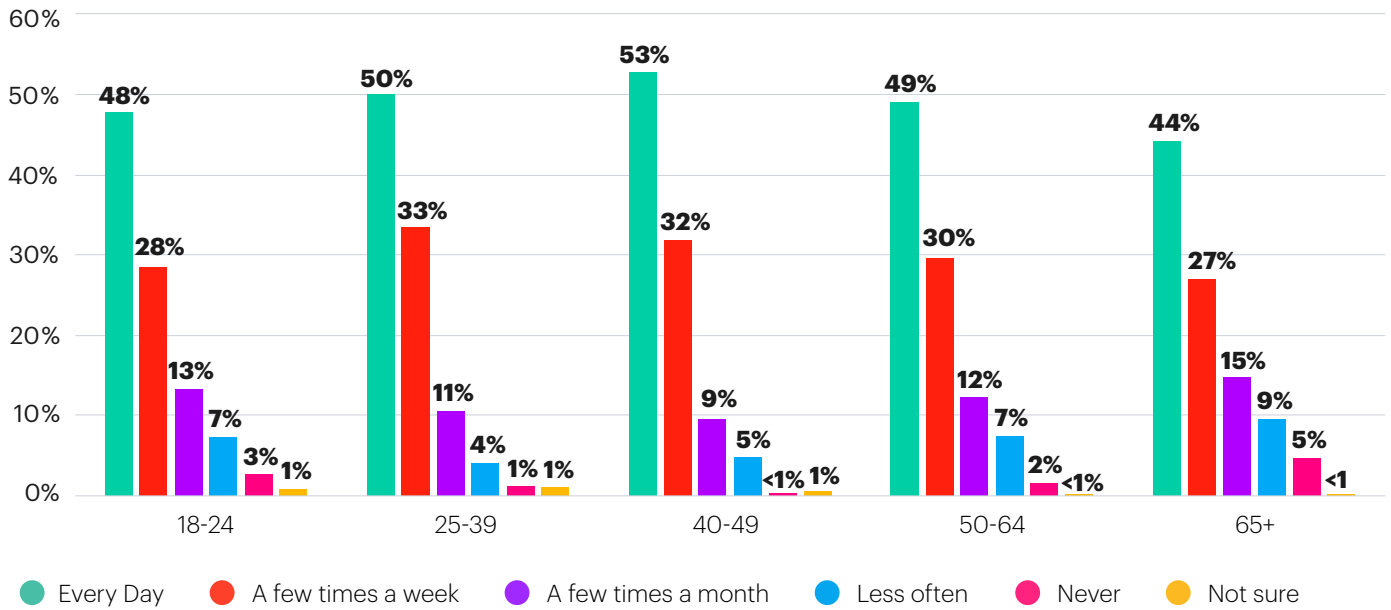


Q: How often do you watch shows and movies at home?



Frequency of shows and movie consumption among US and UK adults

% of adults in both markets (US and UK)



Q: How often do you watch shows and movies at home?

The relationship between age and consumption does not appear to be linear. Daily TV viewership peaks among 40-49-year-olds but falls away again amongst older groups. The proportion of respondents that watch shows or movies a few times a month or more is lowest in those aged 65 or older (**86%**), with this figure rising as high as **94%** in the 40-49 age group.

Ten percent of 18-24-year-olds in our study say they watch movies or shows at home less often than a few times a month. This figure is higher than that of any age group bar those aged 65+, and includes a remarkable **3%** of 18-24-year olds who say they never watch shows or movies at home

While the figures are still strong overall for younger viewership, this trend to watch less than some older generations is one that is rightly attracting attention among those in the broadcast world. It's possible that the influence of platforms such as YouTube and TikTok, which are used most prevalently by younger audiences and host ecosystems of highly engaging content, leave these generations less interested in and with less time to watch traditional shows and movies.

Measuring the potential reach of product placements on streaming platforms

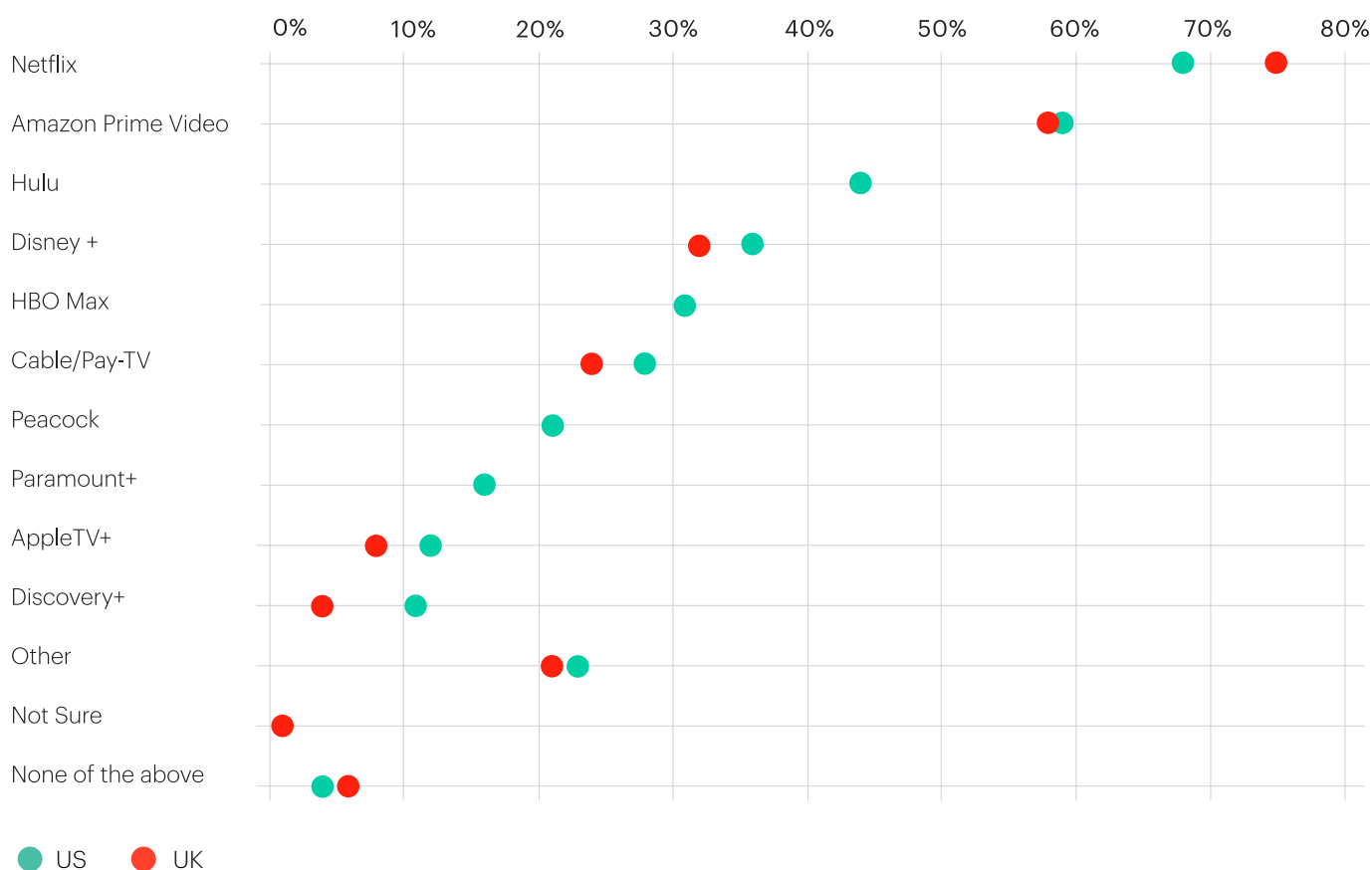
The most popular platform for consuming shows and movies is Netflix, with more than seven in ten subscribed to the SVoD service across both nations combined. UK consumers are

more likely to have subscribed to Netflix than US consumers, with **75%** of Brits in our study saying they use the service.

More than 7 in 10 UK and US adults use Netflix to consume movies and shows at home

Streaming usage by platform

% of adults in each market



Q: Which of the following services do you use to consume shows and movies? Services such as Paramount+, HBO Max and Peacock are not currently available to UK customers

Netflix is an anomaly in our study in that it is the only one of the major streaming services that sees a higher proportion of Brits subscribed to it than Americans. Amazon Prime Video, as the second longest-standing of the major SVoD platforms, is next closest with **59%** of respondents in the US having subscribed compared to **58%** in the UK. These wider subscription bases may suggest that it takes longer for platforms to establish a presence and see significant uptake in the UK's streaming scene.

In America, five platforms have pushed past Cable TV since their launch, with Netflix (**68%**), Amazon Prime Video (**59%**), Hulu (**44%**), Disney+ (**36%**) and HBO Max (**31%**) all seeing higher subscription numbers than Cable (**28%**). These services establish themselves as the big five of SVoD streaming, with a chasing peloton that includes the likes of AppleTV+ and network-run SVoD platforms like NBCU's Peacock and ViacomCBS's Paramount+.

Expert View

Disney's **67%** ownership share in Hulu means that The Walt Disney Company has majority ownership of two of the five largest streaming platforms by American subscribers, according to our study.

Recent YouGov Safe data shows that the strategy of spending big on original programming in order to gain market share is working for AppleTV+, with its original series Ted Lasso having converted 6.5m subscribers to the platform in the US alone.

Signs of encouragement for the chasing pack from our study include Paramount+ being the platform with the highest proportion of American users who watch daily (**73%**), while Peacock appear to have successfully penetrated key younger demographics in the US market with **40%** of their audience being under the age of 40 – that's twice that of those watching shows and movies on Cable TV (**20%**).

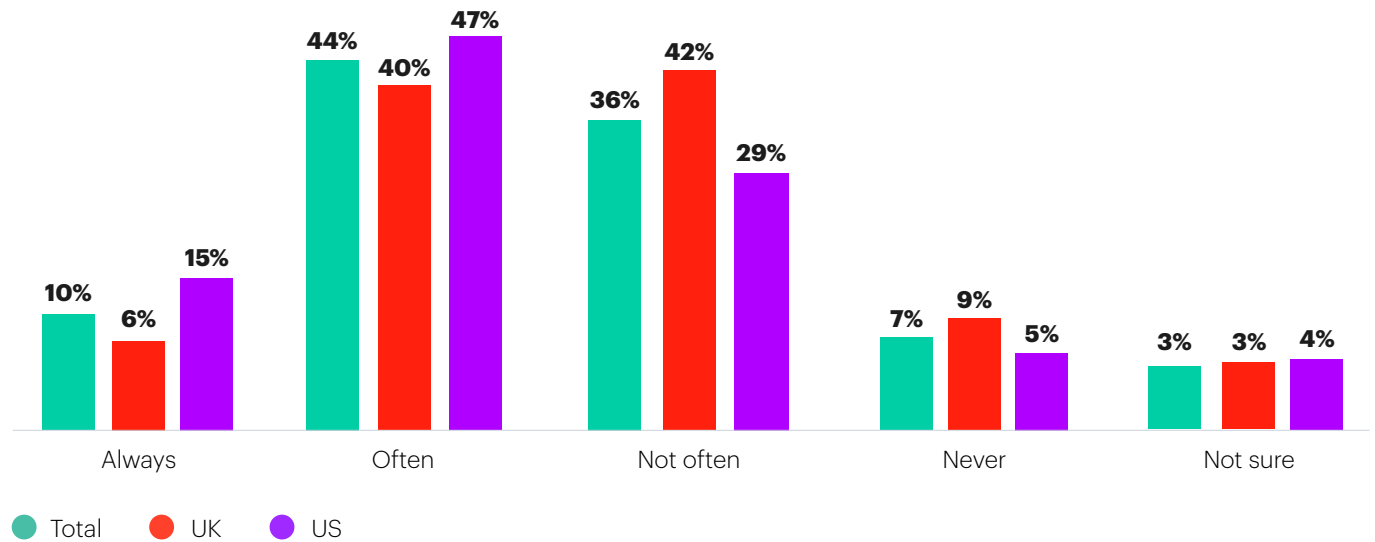
Awareness of product placement

So now we've established exactly what the audience size is for TV and film in the home today, how aware are consumers of the product placements on their screens?

This is a question that has long troubled marketing executives, many of whom continue to favour buying dedicated advertising spots over a more subtle, perhaps less noticeable product integration that comes with more creative and regulatory constraints and a reach considered harder to quantify.

Awareness of product placements in shows and movies

% of adults in each market



Q: How often, if at all, do you notice product placement in shows and movies?

Our study indicates that a majority (54%) of consumers notice product placement in shows and movies either always or often, with only 7% saying they never notice it.

In the US, **15%** of consumers say that they always notice product placement when watching shows and movies, significantly higher than the UK figure of **6%**. In general, Americans are more likely to be aware of product placement when watching shows and movies than Brits, though the difference is seen more in the frequency that the groups

notice it rather than in the numbers who have seen it at all. In both markets, around nine in ten consumers indicate that they have noticed product placement (to any degree of frequency) in the past, with less than **10%** in both markets saying that they have never seen it.

Expert View

There is clear variation in the rate of awareness of product placements between the US and UK, and these territorial differences in the frequency with which consumers notice product placement are perhaps symptomatic of the more stringent product placement regulations that apply in the United Kingdom.

There is a complete absence of product placement in shows made under Article 50 of the BBC Agreement for British Broadcasting Corporation (BBC) licence fee funded services, for example, with the BBC being the UK's largest broadcaster of free-to-air content. In fact, product placement itself was only made legal in the UK in 2011, while in the US it has never been outlawed – although acknowledgements must be made to protect viewers.

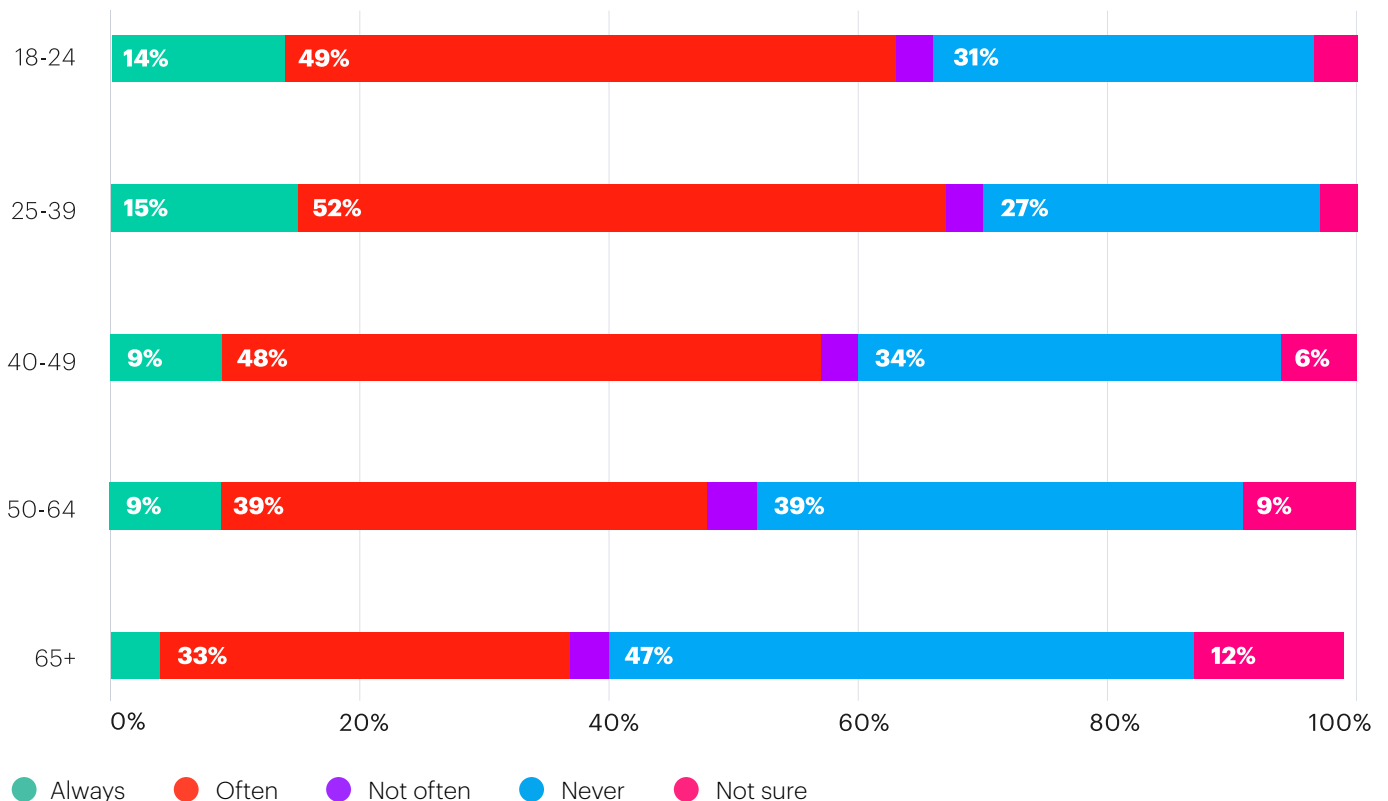
Interestingly, linear TV under-indexes on viewers seeing product placement on both sides of the Atlantic. In the US, respondents who indicated that they watch Cable TV were more likely to say that they never see product placement than those from any of the other services listed in our study. The same was true for those in the UK who indicated that they subscribe to Pay-TV.

At the opposite end of the spectrum, AppleTV+ and Discovery+ over-index on subscribers noticing product placement. A higher proportion of subscribers to these two platforms than any other answered that they 'Always' noticed product placement across both territories. These figures imply that both services host content that is highly saturated with product placement, attract viewers with high attentiveness, or simply host content that places products effectively. The reality is, perhaps, a combination.

The relationship between age and awareness of product placements

Awareness of product placement in shows and movies by age

% of adults in both markets (US and UK)



Q: How often, if at all, do you notice product placement in shows and movies?




The most attentive age group when it comes to noticing product placement are 25-39-year-olds, with these millennials responding in the highest numbers of any age bracket to noticing product placement both 'Always' (**15%**) and 'Often' (**52%**). Combine these responses and we see that two-thirds of 25-39-year-olds notice product placement regularly - an encouraging number for such a key demographic given their propensity to engage with media content and brands.

Our data shows that the likelihood of noticing product placement tends to correlate inversely with age, meaning that the younger the viewer the more likely they are to notice product placement. This is in part due to difference in viewership habits. Younger demographics tend to be more

likely to engage with newer content. With the bulk of the product placement industry's market size having been added over the last decade, the kinds of content that younger people tend to watch are themselves more likely to include product placement.

Overall, our takeaway here is that awareness of product placement is strong, something which marketing executives can take confidence from. With nine in ten consumers having noticed product placement to some extent in the past, and even higher awareness amongst key young demographics, it's clear that product placement is an effective way for brands to reach consumers.



Unlocking more streaming insights with YouGov

The invention of **YouGov Safe** allows brands and advertisers to move past what consumers say to what they are actually doing. This provides more actionable insights into the potential engagement and effectiveness of product placement. The latest advancement to the YouGov connected data ecosystem is **YouGov Safe**, a fully opt-in cross-device tracker of online behavioural data that includes not only streaming, but also gaming, shopping, search and more. The first sub-product of **YouGov Safe** is YouGov Stream, an audience streaming tracker that monitors reported streaming attitudes and behaviours with verified SVOD and AVOD viewership data across multiple streaming services.

Using this verified viewership data, YouGov has built a skunkworks project that monitors product placement within streaming content and uses a proprietary valuation model built from YouGov panel data to value the exposure received by brands. This has the prospect of delivering deeper marketing and audience insights than has ever been possible previously, with brands being able to discover not just what exposure they received and how much that was worth, but also who they reached and, thanks to YouGov's connected data ecosystem, whether the exposure led to conversion amongst prospective customers.



Section 2

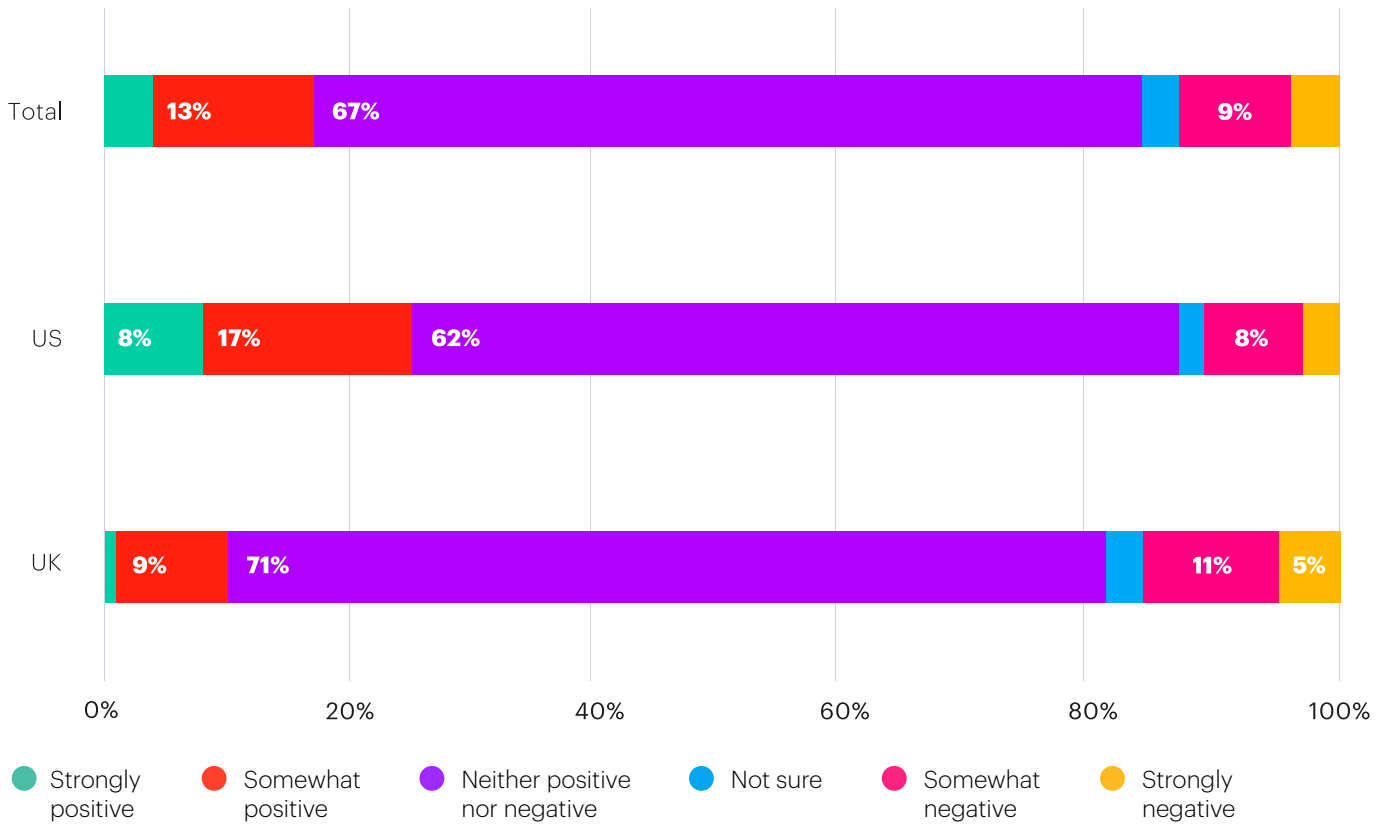
Consideration for product placement

Across our study, two-thirds of respondents reported no noticeable change in their consideration for products after being exposed to product placement, with the figures painting a picture that is marginally positive on balance. **17%** say it positively impacts their consideration for products while a smaller **13%** say it has the opposite effect.

Data from **YouGov Profiles**, an advanced audience intelligence tool, reveals that consumers generally would rather advertising did not exist in the content they watch (**52%** of US adults and **42%** of English adults agree that ads are a waste of time), emphasising how impressive it is that product placement manages to see positivity outweigh both those expressing their natural apprehension towards advertising by answering negatively, as well as those who find product placement to be obnoxious or otherwise negative.

Product placement's impact on purchase consideration

% of adults in each market



Q: Thinking of the times you've noticed product placement in shows and movies, would you say it has a positive, negative, or no impact at all on your consideration of the product?



Seeing product placement can be forced or distracting as attention is drawn away from dialogue...or [it] can be an integral part of a persona, like Aston Martin and James Bond.



- US study participant





That most respondents indicated ambivalence towards their consideration for products after seeing product placement is not surprising. It is part-and-parcel of advertising that people express disinterest or apathy towards ads and many advertisers having to reach thousands to convert even only a handful to the next stage of the consumer journey. In fact, that as many as **30%** of respondents in the study expressed an opinion, be that positive or negative, suggests that product placement is effective at engaging consumers.

Looking at both nations individually, consideration sees a marked difference between Americans and Brits that follows the trend seen earlier around Awareness.

More Americans are impacted positively (25%) by product placement than negatively (11%), while in the UK the opposite is true - just 10% say that product placement positively impacts their consideration of the product, versus 16% who say it negatively does so.

This starts to flesh out a picture of the UK that points to Brits being less familiar and perhaps therefore more apprehensive towards product placement, though the higher number of those reporting ambivalence (**71%**) suggest that there is a battle to be won by UK marketers over these undecided consumers.

The fact that one in four Americans responded positively to the question of consideration may be particularly encouraging to marketers. Amongst Americans who have had their consideration affected by product placement, more than twice as many reported a positive impact than did a negative one. This presents a powerful asymmetry that can be exploited by US advertisers, who can engage in product placement knowing that, if executed well, it will more than likely be effective in increasing (and, crucially, not diminishing) consideration for their brand and products.



They feel unnatural and forced most of the time because we've become so accustomed to branded products being hidden.



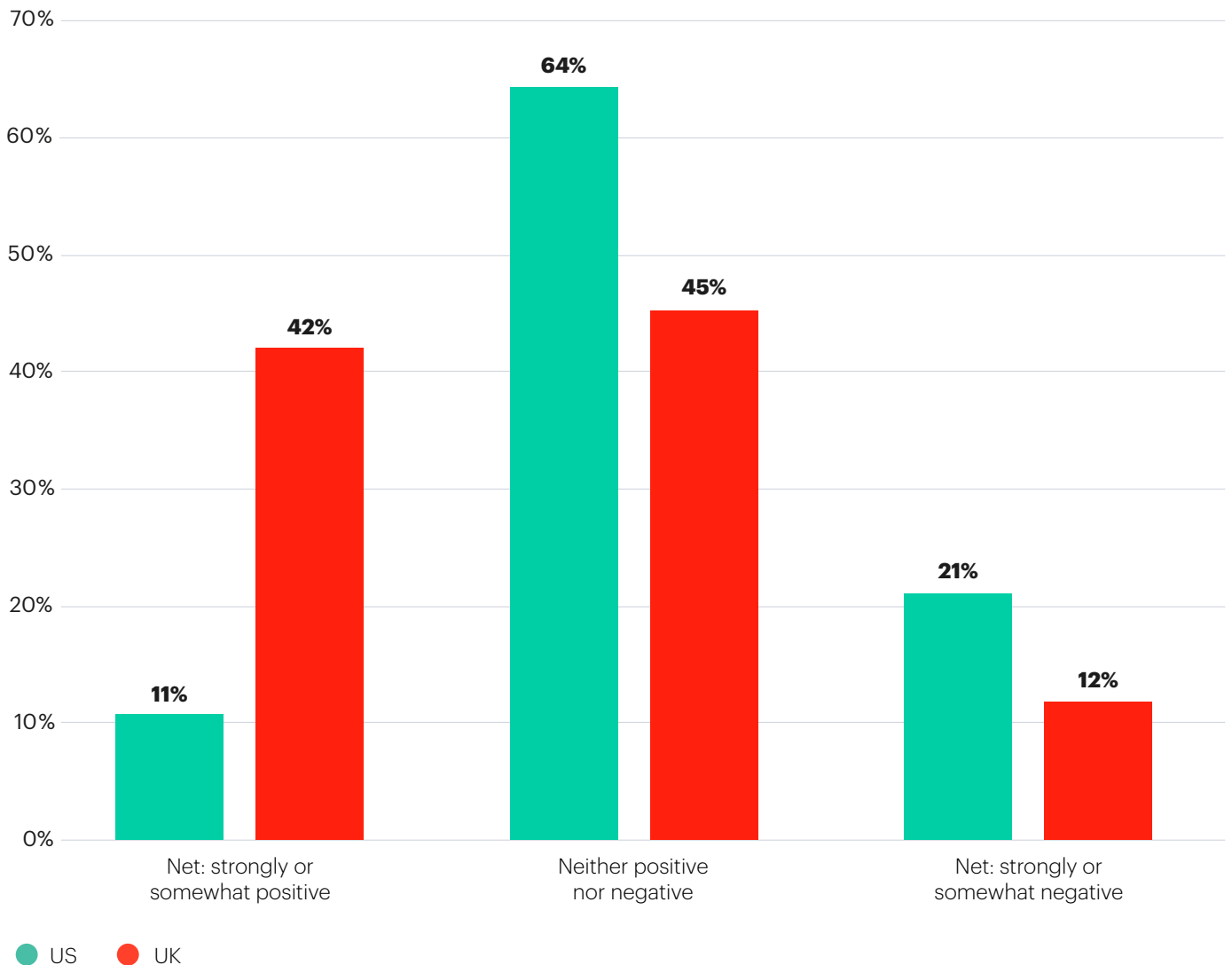
- UK study participant



Consideration for product placements among younger audiences

Product placement's impact on purchase consideration among 18-24 year olds

% of 18-24 year old adults in each market who say product placements in shows and movies have the following effect



Q: Thinking of the times you've noticed product placement in shows and movies, would you say it has a positive, negative, or no impact at all on your consideration of the product?



Having been brought up on BBC channels with no ads, I find them a tiny bit annoying but not enough to spoil my enjoyment of the show.



- UK study participant

Across our entire study, 18-24-year-olds were the most likely of any age group to have their consideration for products impacted positively by product placement. But the individual data from the two nations tells a contrasting story

Young Americans seem to be heavily influenced by product placement, with a majority (**56%**) reporting some impact on their consideration, be it positive or negative. Those reporting positive impact on their consideration for products (**42%**) outweighed those reporting negative impact (**12%**) by a ratio of more than three to one.

These figures are striking. Almost as many young Americans reported a positive impact for consideration of brands after seeing product placement as did those reporting no impact at all, indicating that brands that have been targeting this demographic with their placements have the potential to enjoy significant success.

The picture from the other side of the pond is less encouraging, however. British 18-24-year-olds are far more likely to be ambivalent about promoted products, with almost two-thirds (**64%**) responding that exposure to product placement had neither a positive nor negative effect.

Additionally, a meagre **11%** reported a positive impact to their

consideration versus almost double (**21%**) who said that it impacted them negatively. Clearly, then, there is more work to do to normalise and integrate product placement more effectively amongst this demographic in the UK. The issue may just be the level of exposure, with adjusting to product placements popping up in content taking time, since it is the exception rather than the rule on British TV. Amongst all age groups in the UK, respondents who indicated that they watch shows and movies every day were the least likely to say that it impacted them negatively. That suggests that volume may help to de-sensitise viewers to product placement's negative effects.

Looking at product placement's impact on consideration by services, it appears that Paramount+ are able to product-place most effectively. One third (**34%**) of subscribers to the platform indicate that they have been positively impacted by product placement, with the likes of Discovery+ (**31%**), and HBO Max (**30%**) also featuring towards the top of the list. Perhaps most impressive in this list is Discovery+, since the other two platforms are only available to US customers and so do not have their responses diluted by the generally more apprehensive British consumers. In fact, in the US, **37%** of Discovery+ customers indicated that they were positively affected by product placement, the highest percentage of any of the services in the study in either country.

It's clear, then, that product placement is both getting attention from consumers and - one way or another - has the ability to impact their views on products. What still remains to be seen, though, is what exactly drives these changes in consideration. What do those who are positively or negatively impacted by product placement see as being the drivers behind their shifts in consideration? And what can brands themselves learn in order to both avoid the pitfalls of product placement and to capitalise on its strengths?



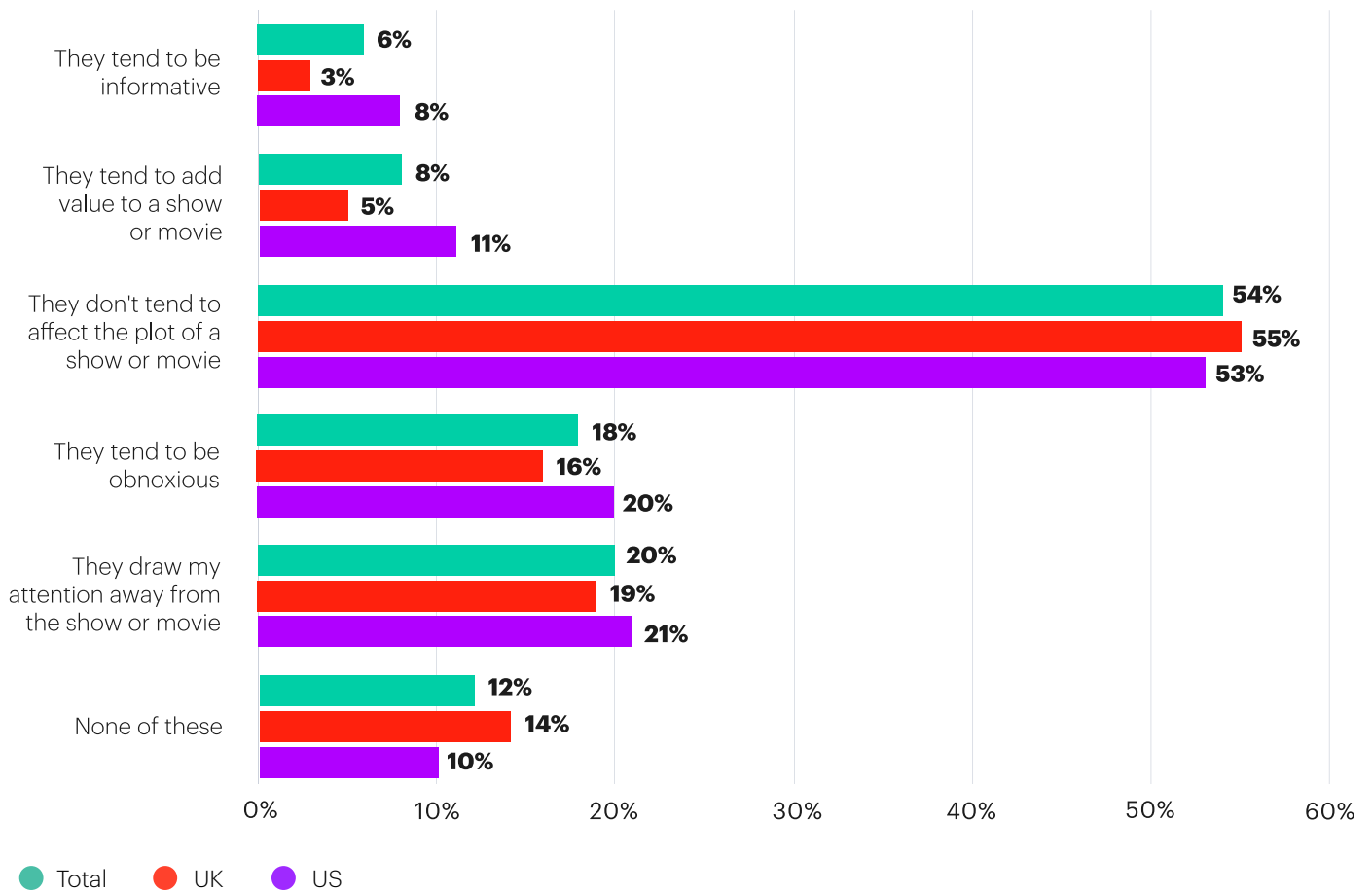


Section 3

Perceptions of product placement

Key perceptions toward product placements

% of adults



Q: Thinking of the times you've noticed product placement in shows and movies, which of the following describes how you feel about product placements? Respondents were asked to select all that may apply

The data around perception deviates slightly from what we saw around consideration. While consideration for products was marginally more positively affected by product placement (**17%** vs **13%**), it appears that the perception of product placements as a concept skews negatively.

The figures for those saying that product placement tends to be informative (**6%**) and adds value to a show or movie (**8%**) were markedly lower than those who said it tends to be obnoxious (**20%**) and draws attention away from the show or movie (**21%**). These figures may appear concerning, but there are a few points to note. First, just because a consumer's attention may have been drawn away from a show or movie

does not necessarily mean that they weren't positively impacted by the placement, and so the connotation here may be positive for marketers, rather than negative.

Secondly, the seemingly neutral response of saying that 'They don't tend to affect the plot of a show or movie' is perhaps for many a positive, with it being possible that respondents who replied with this answer were simply expressing that they felt the placements were integrated seamlessly. In short, it's important not to conflate the idea of a placement not affecting the plot of the content, with the notion that the placement has no effect on the consumer.

I'm fine with it when I like the product. Not so positive with products I don't like.

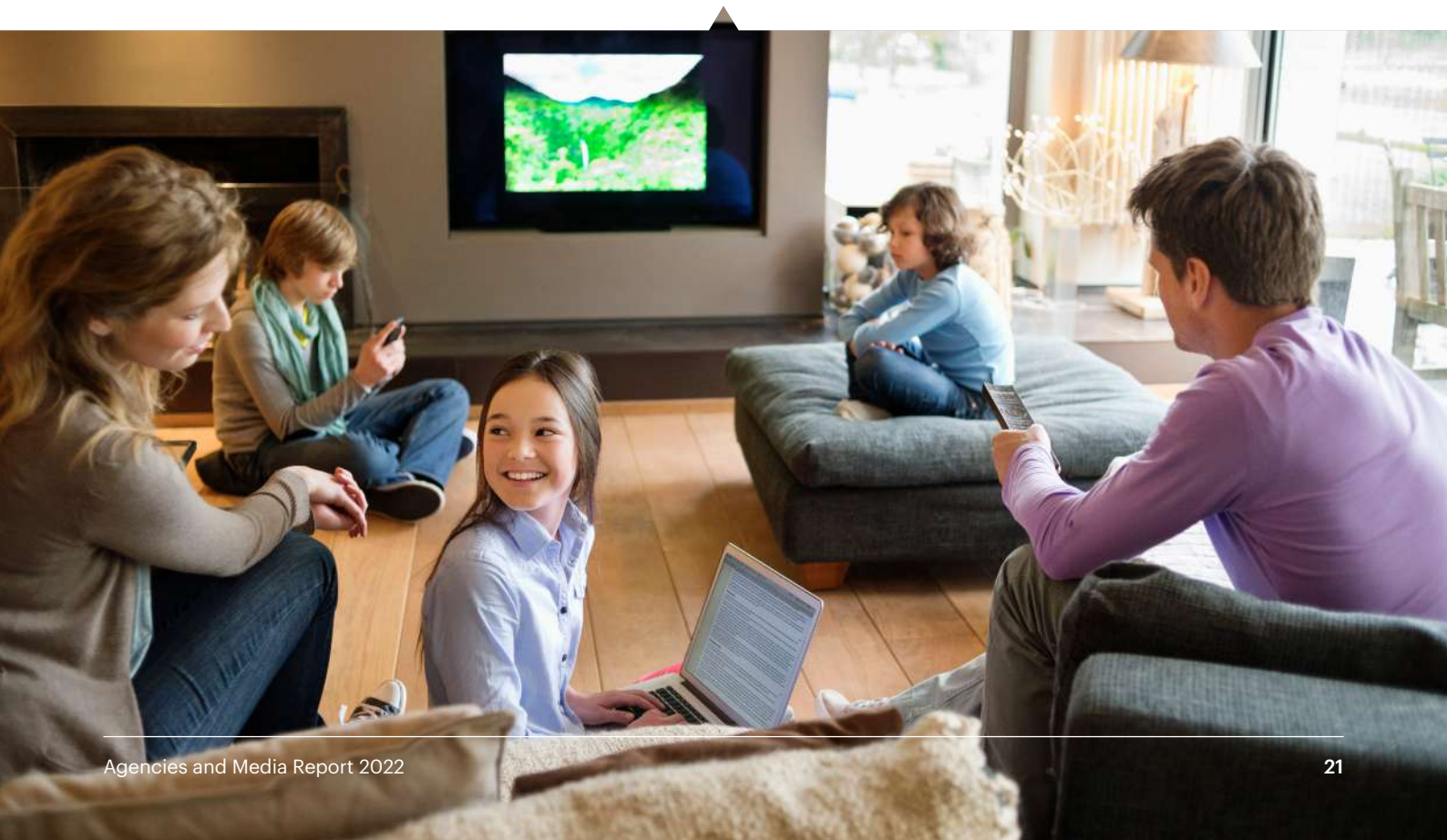
- US study participant

Overall, a majority (**54%**) of our survey participants in both nations say that product placement does not tend to affect the plot of a show or movie, which should provide studios with some confidence that taking on product placement deals will not jeopardise the integrity of their titles.

It's OK if it's subtle. Too obvious and it puts me off both the programme and the product.

- US study participant

Brits tended to be less emotive about product placement in both directions, responding in lower proportions than their American counterparts for every answer bar expressing that they didn't feel as though product placement affects the plots of shows or movies.





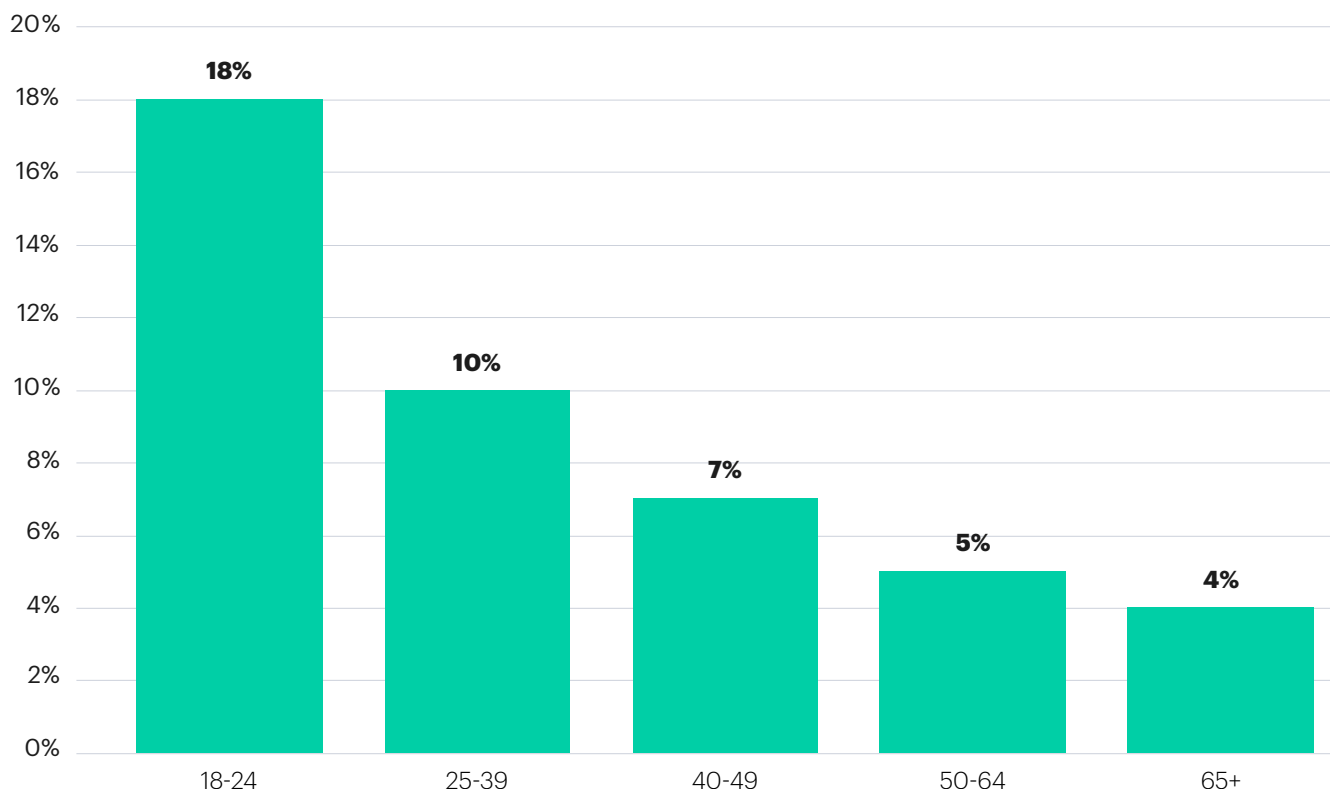
Perception of product placements by age

Belief that product placements add value to shows and movies decreases sharply with age. Across the entire study, 18–24-year-olds were the most likely to both find product placements informative (**9%**) and to say that they add value to a show or movie (**18%**). Support for these views are lowest

amongst those aged 65 or more (**3%** and **4%** respectively and, in fact, the percentage of study participants who felt that product placements add value decreases linearly across each age group.

Share of consumers who believe product placements provide added value to shows and movies

% of adults in the US and UK who say product placements in shows and movies add value



Q: Thinking of the times you've noticed product placement in shows and movies, which of the following describes how you feel about product placements?

Perception by platform

Looking at perception by where people consume their content, there is seemingly more good news for AppleTV+. The platform sees the highest proportion of subscribers saying that product placement added value to shows and movies (**17%**), with Cable TV viewers answering affirmatively in the smallest numbers (**9%**).

But this data can be misleading in isolation. Our study suggests that changes in perceptions almost always happen bidirectionally when stimulated. For example, Cable TV viewers while being the least likely to think that product placements add value, are on the other hand the most likely to say that product placements don't affect the plot (**60%**). And while AppleTV+ viewers are most likely to say

that placements add value, they are also the most likely to say that they are both obnoxious and draw attention away from the show or movie (**29%** each). A clearer picture emerges from this services analysis that accurately depicts the nuances of perceptions around product placement more generally. What is informative for some is obnoxious for others; what adds value may also distract. It may be difficult to achieve any one of these effects without also provoking another.

In order to explore these questions more deeply, the study included an open-ended question that allowed respondents to directly express their feelings in their own words. Included in this chapter are some responses from these consumers.

United States

"I always notice what brands characters eat or drink. I find it interesting to see if I share their tastes."

"It takes me out of the experience. Another reason to love period plots. It's impossible to book product placement."

"I hate being manipulated, and usually will make it a point to not buy those brands afterwards."

"I feel they are a part of life. Less obnoxious to have a real brand than a made-up brand."

"I like them a lot. They make the show seem more immersive and real."

"If it is a character I like using the item, it gives me a favorable impression. Similarly, if it is a product I like, it gives a boost to the character."

United Kingdom

“It just reflects the real world and is better than attempts to disguise things.”

“It keeps me up to date with what is going on with trends these days, like new technologies.”

“I like that I recognise products and feel positive towards them when I see them, particularly in movies.”

“It feels like an attempt to manipulate, which I heartily dislike.”

“I find it amusing to think that a fictional character could encourage me to emulate their lifestyle by buying the items shown. Maybe subliminally it does work.”

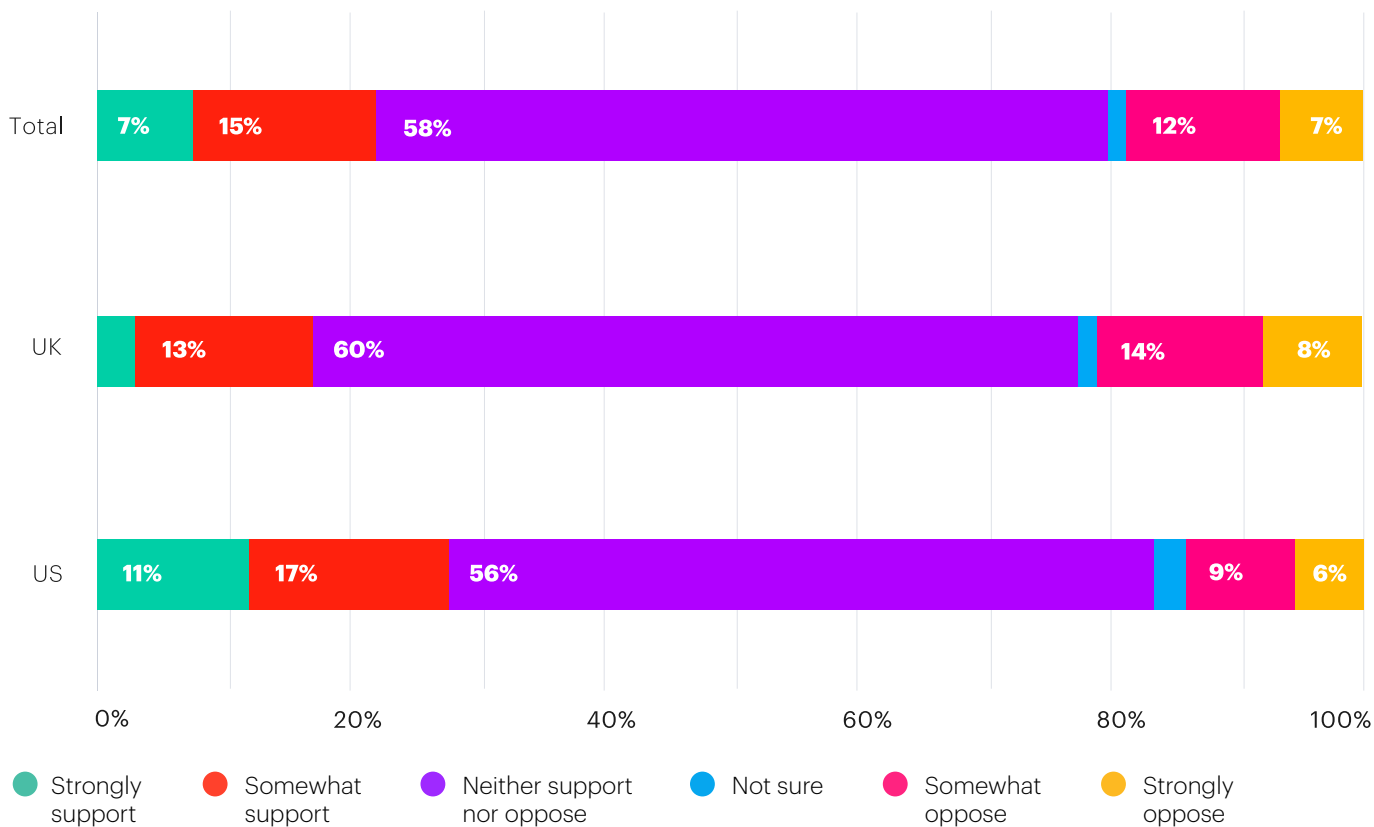
“I don't mind. It is a way for shows and films to fund themselves so that we can be entertained.”

Support for product placement

One theme that emerged from the open-ended question we posed around perception was a view that seemed to be held by a good number of consumers in both markets, which was that product placement was somewhat of a necessary evil. This is interesting as it implies that, even though people may perceive product placement negatively, they may ultimately regard it as a bargain they are prepared to strike to watch content. It's an important distinction, and one that the latter part of the study focused primarily on exploring in more detail.

Support for product placements in shows and movies

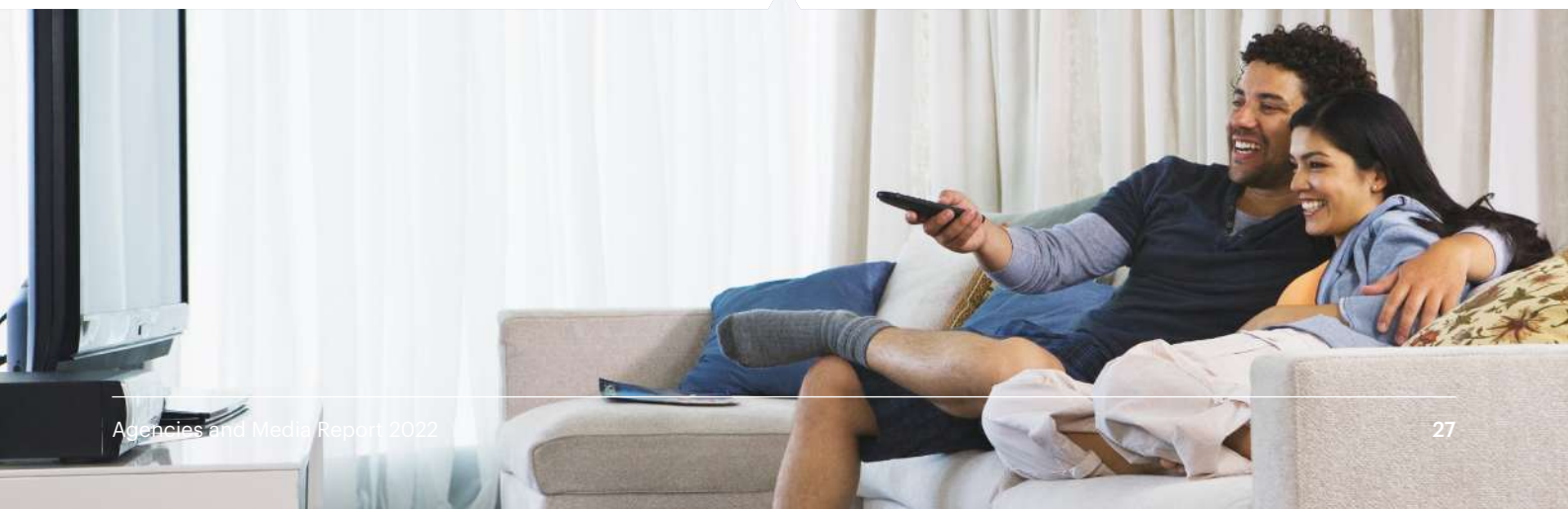
% of adults



Q: Do you support or oppose the use of product placement in shows and movies?

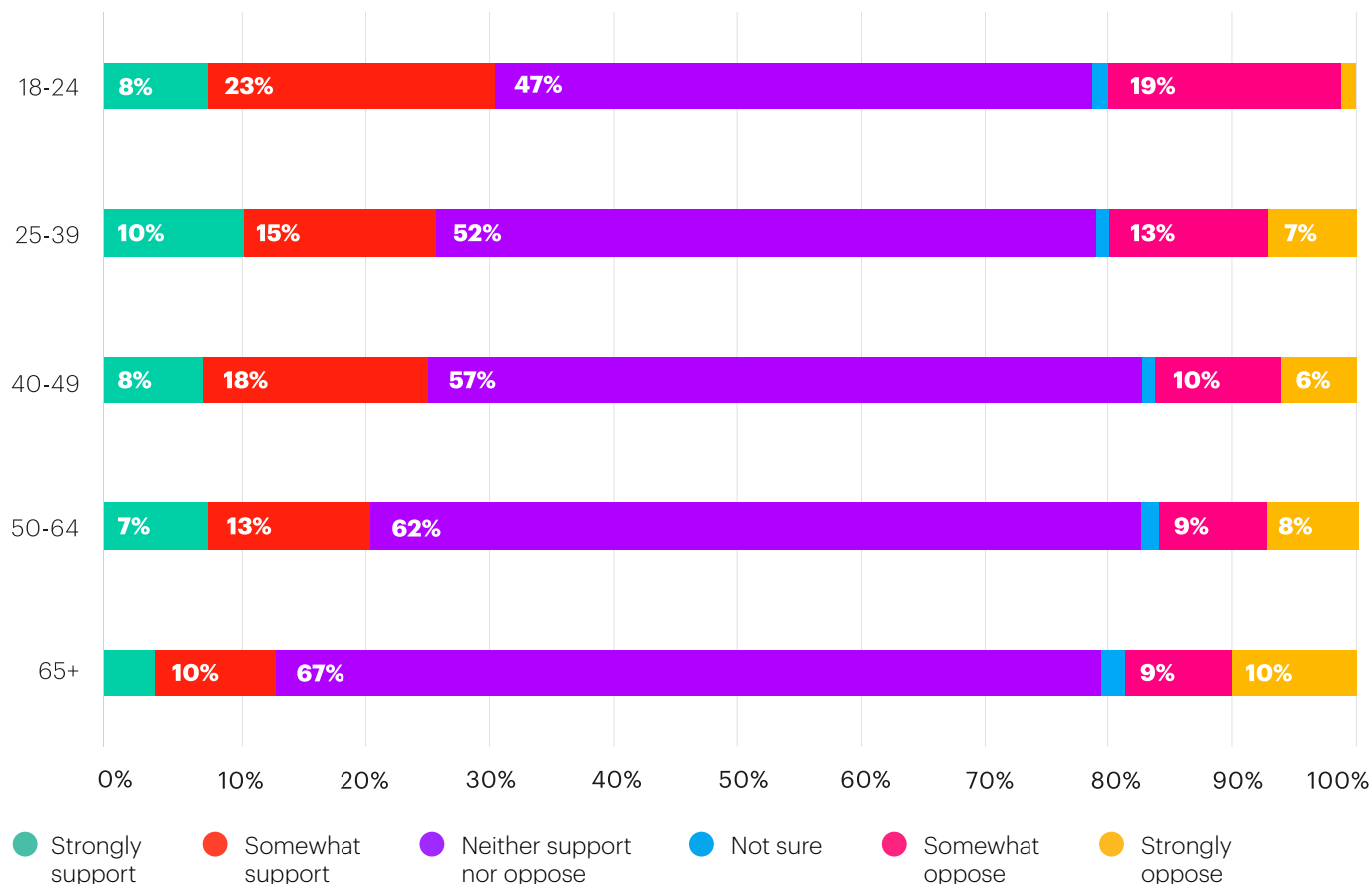
Only 19% of Brits and Americans oppose product placements

Overall, we see that the majority of both Americans and Brits are indifferent towards product placement, with the UK seeing slightly higher numbers of ambivalence (**60%**) than the US (**56%**). Across the entire study, just **19%** reported opposition to product placement, with **22%** explicitly stating their support. Similar to what we saw previously for both consideration and perception, Brits appear frostier towards product placement with **22%** in opposition and **16%** in support. Americans come in with **28%** support and just **15%** in opposition.



Age breakdown of support for product placement

% of adults in both markets (US and UK)



Q: Do you support or oppose the use of product placement in shows and movies?

Age is again a big factor in reported levels of support and young people are the most polarised on support for product placement. Across the entire study, 18-24-year-olds were the only group in which a majority had a non-neutral opinion on product placement. They reported **31%** support for product placement (the highest of any age group) but were also the group that reported the highest opposition (**21%**).

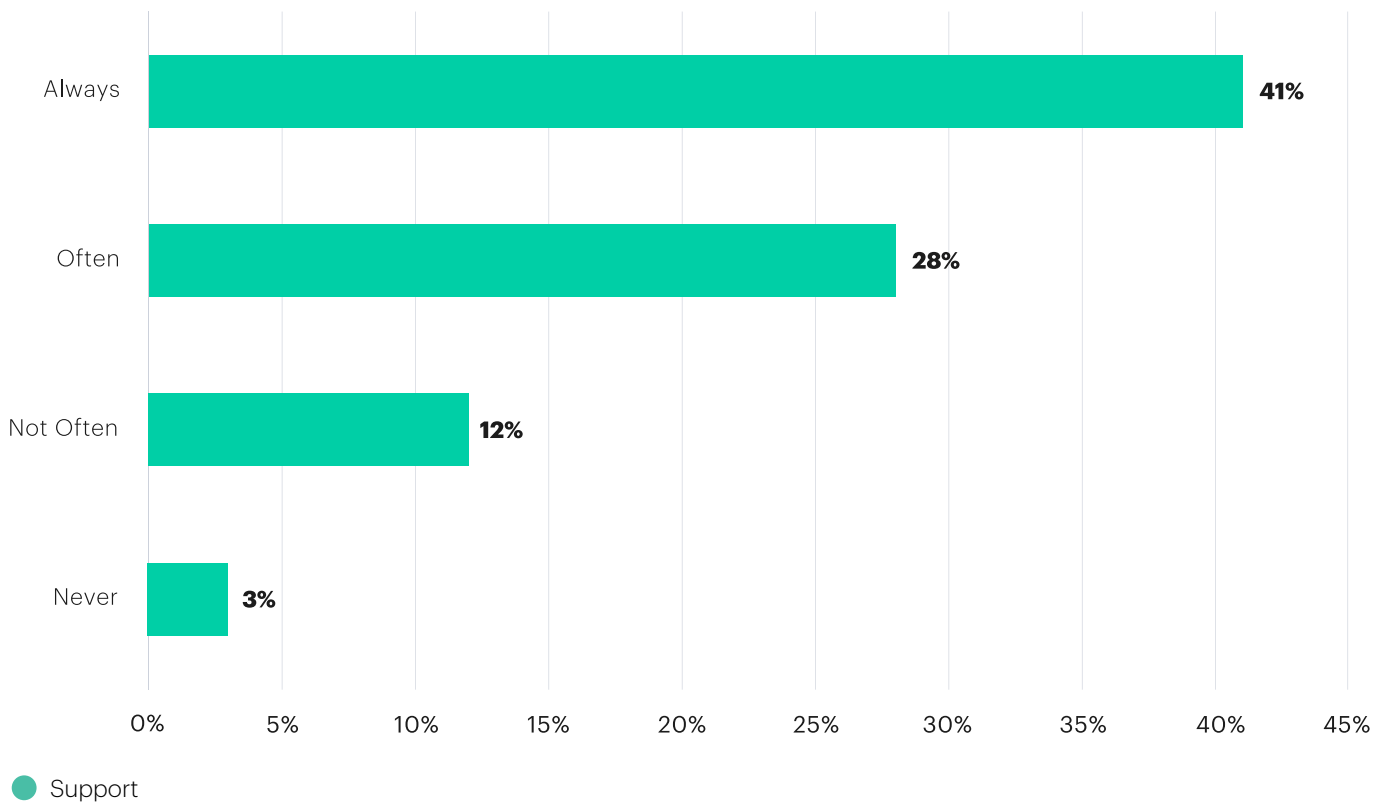
This Gen Z population are the most polarised by product placement, though levels of opposition were fairly consistent between age groups. The lowest opposition (at 5 points less than Gen Z's) was among 40-to-49-year-olds (**16%**), whereas the lowest support was much lower than the **31%** of 18-24-year-olds, at just **14%** among the over 65s.

Amongst Americans, the strongest support for product placement was among those who told us that they watch shows and movies every day. More than one in ten (**13%**) of everyday viewers strongly support the use of product placement, with a further **17%** supporting it somewhat.

This trend was the same in Britain, though marginally less pronounced. One in five (**20%**) of everyday viewers show some form of support for product placement, with this figure decreasing to **5%** among those who watch shows and movies less often than a few times a month. This figure trended consistently downwards through the groups who watch shows and movies less, perhaps again indicating that people become more accepting of product placement the more they are exposed to it.

Level of support for product placement by awareness of product placement in shows and movies

% of adults in the US and UK who notice product placements at the following frequency and say they strongly or somewhat support product placements



Q: Do you support or oppose the use of product placement in shows and movies?

Expert View

Adding weight to this argument is the fact that 41% of consumers across both nations who indicated that they 'Always' notice product placement also show support for it, with support decreasing sharply as reported instances of noticing placements decreased. Caveating these figures, it is worth noting that there could also be a causal relationship that instead sees those who don't support product placement watch shows and movies less as a result, meaning they also see less placements.



Support for product placement is highest amongst those who notice it most

Looking at the services in our study, The Walt Disney Company see both of their platforms score on the lower end of Americans' support for product placement, with Disney+ viewers showing **28%** support and Hulu **29%**. At the other end of the table, **39%** of American Discovery+ subscribers express support, making it the service with the highest levels of support for product placement in the United States.

In the United Kingdom, AppleTV+ is the service which sees the most support for the use of product placement amongst subscribers at **32%**, with Netflix at **18%** being the lowest and Amazon Prime Video (**19%**) not far behind. Important to note is that AppleTV+ subscribers are all users of Apple technology (you must have an AppleID to register for the service), and product placements on the service's shows and movies feature Apple products heavily. This means subscribers are being shown products that we already know they have an affinity to, and that means we should take this high level of support with a pinch of salt.



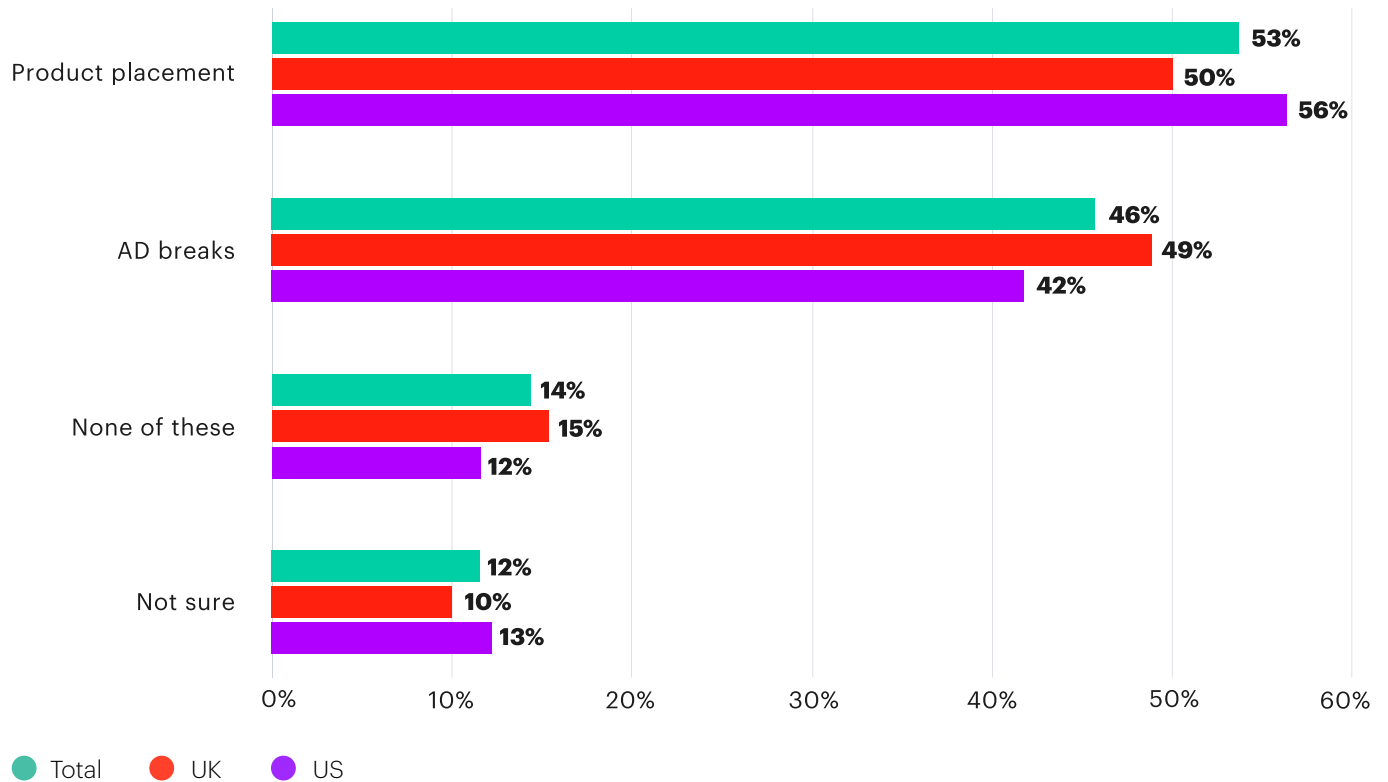
How do consumers perceive product placements compared to ad breaks?

The final part of our study seeks to contextualise the appetite for product placement versus the other main form of revenue generation for services and studios - ad-breaks. To do this,

we asked survey participants what they thought was fair to be shown in exchange for free content.

Perceptions of seeing certain types of ads in exchange for free content

% of adults in each market who say it is fair for shows and movies to show the following in exchange for free content



Q: Which of the following do you think is fair for shows and movies to show consumers in exchange for free content?
 Respondents were asked to select all that may apply.

Averaging across both markets, a majority of respondents believe that it's fair to be shown product placement in exchange for free content, while only an average of 46% believe that adbreaks are a fair trade-off for it. There is an acceptance among many consumers that ads represent an acceptable bargain, with only 14% of people believing that neither of these were fair for viewers to be shown.

The theme of Americans being more open to product placement continues here. Americans are six percentage points more likely to accept product placement in exchange for free content, while the proportion of Brits who accept ad breaks is seven points higher (49% to 42%).

Approval was again highest amongst 18-24-year-olds across the study with 60% feeling that being shown product placement was fair, though the territorial differences here were large with as many as 70% of American 18-24-year-olds responding positively versus just 50% in the UK.

Approval was lowest (43%) amongst the 65+ demographic, who were also the least likely to say that they felt ad-breaks were fair (41%). Compelling news for prospective product placers is that every age group favoured product placement over ad breaks, though the difference was closest among 40-49-year-olds, 54% of whom felt being shown product placement was fair, versus 53% who felt that being shown ad breaks was fair.

▶ Conclusion

YouGov's data shows that attitudes towards product placement are generally encouraging for both studios and brands looking to engage in this type of marketing. It's important to note, though, that the landscape is nuanced and characterised by publics in both countries who are generally apprehensive towards any form of advertisement around movies and shows.

Opportunities for product placement appear to be ripest amongst younger demographics, with age being one of the strongest and most heavily inversely correlated factors with all aspects of the consumer journey – Awareness, Consideration, Perception, and Support. But young people are also most polarised about this form of advertising and when combined with their low overall consumption levels of movies and shows (relative to other age groups and to other forms of media), their habits are worth watching closely. For brands looking to product-place, they should understand the following:

1 Brits are still learning

Across all aspects of our study, Britons tend to be less positive than Americans when it comes to product placement. This is likely because of the form's relative youth in Great Britain – and its complete absence on the nation's largest linear TV broadcaster, the BBC. We see that Brits tend to onboard to new services for consuming shows and movies more hesitantly than Americans, but importantly when they do, they do so in proportions that strongly rival the American market.

This is encouraging for product placement because the more Brits are exposed to product placement, the more favourably it appears they tend to think about it.

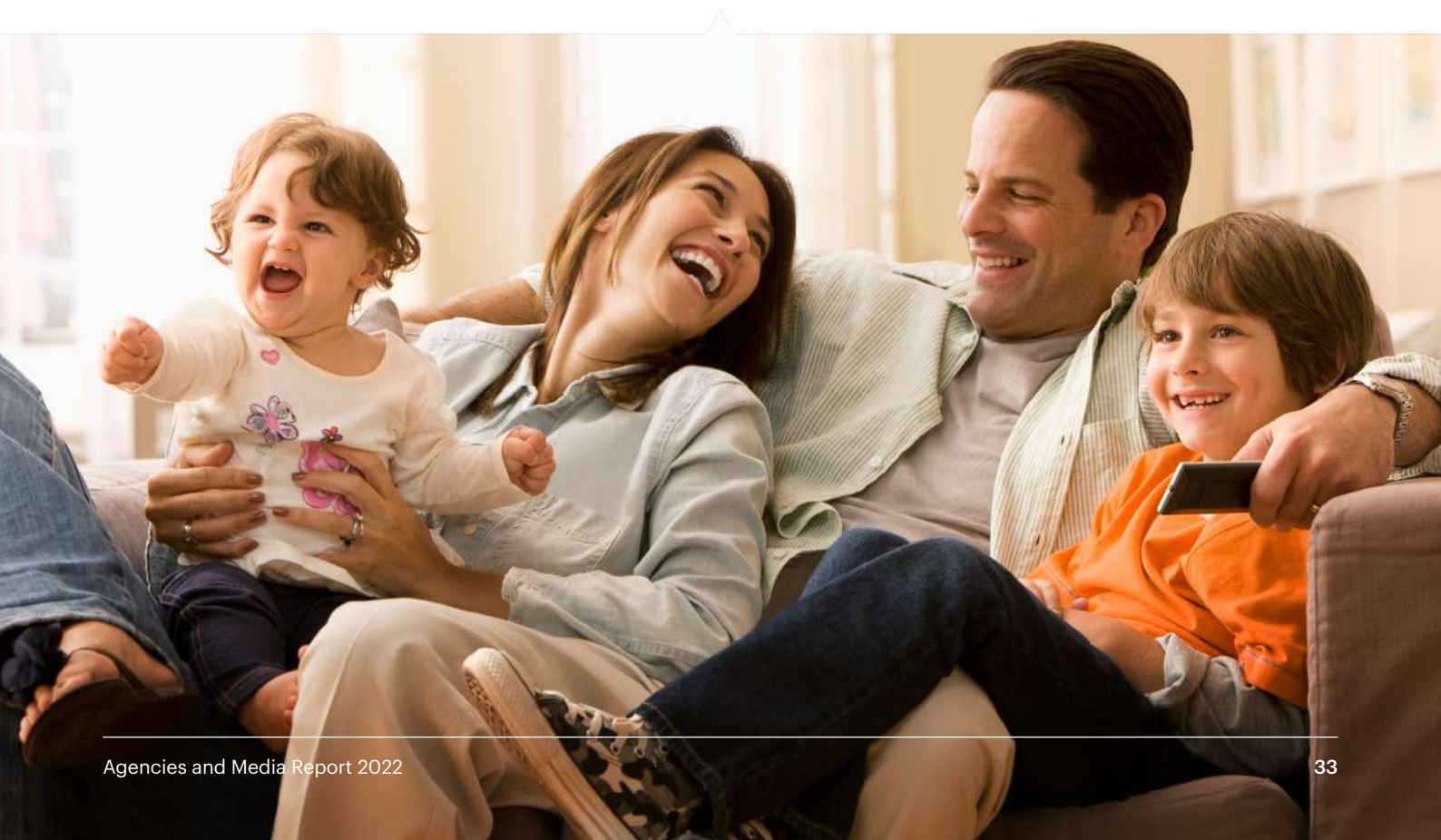
For shows broadcast in the UK, brands should try to introduce product placement cautiously but optimistically. Informative, subtle branding that doesn't detract from the plot of the show or movie is by far the most popular amongst Brits, while branding that draws attention away from the content only serves to create resentment in viewers. **While more Brits oppose product placement than support it, a majority think it's a fair way for studios to generate revenues. Go change doubters to believers.**

2 It's a young person's game

Across all aspects of the consumer journey and both nations involved in this study, young people score more favourably for attitudes towards product placement. Though it seems as though younger demographics may spread their leisure time across more forms of passive entertainment, they still remain by far the most accepting and rewarding group to market to.

Brands should consider how well their target demographics align with those who tend to respond to product placement best. Unlike dedicated advertising spots which can simply be ignored or discounted by uninterested viewers, young consumers told us in droves in the openended section of our study that bad product placement can create resentment towards a brand, since it can spoil the viewing experience. Product placement, therefore, carries a downside risk that other forms of advertising may not.

This shouldn't put marketers off, however. These same factors are what offers product placement such upside when done well, as brands can make themselves synonymous with characters or worlds that people aspire to be and live in. Marketers should take care to know who they are targeting and why, and understand that the odds of success tip further in their favour the younger the demographic they are seeking to engage.



3 Pick your service wisely

There are of course differences in attitudes towards product placement across both countries and age groups in our study, but there are also differences between services. Brands must choose the media channel they're going to place on wisely, but be aware of the nuances in the data.

Our data on AppleTV+ exemplifies why these nuances are important in product placement. We see that viewers of Apple's streaming service are the most likely to say that product placements add value, but also that product placements are obnoxious. US-only services, on the other hand, tend to score more favourably overall due to their data being undiluted by the more apprehensive UK audiences. It's clear there are different demographic makeups for the different services out there, as our data has shown by these variations in support and approval cross-platforms.

It's also clear that marketers should evaluate what this means in terms of effectively placing their products. **Brands must understand the reach of the services they are seeking to product-place on across the different territories, and stay attentive not just to the stories that the data tell us, but also to be mindful of those that the data doesn't reveal. Doing so will help to ensure a brand's success.**

4 It's all in the execution

Another key insight evident from the data, but made explicitly clear in responses to our openender, was that product placement is won or lost in the execution. The ability to make your brand synonymous with a character or world, or augmenting the profile of one of these with your brand, is ultimately what will likely define success.

Many respondents told us that they love seeing characters use brands that they'd expect them to use, or that when a brand becomes synonymous with a character they enjoy, it significantly increases their desire to purchase that product. On the other hand, as we mention above, poorly executed product placement only serves to create resentment for brands and products. Since consumers seem to warm to product placement the more they see it, and also tend to favour brands that make themselves synonymous with different aspects of shows or movies, which is a process that takes time, focus on nurturing long term relationships and integrating your products as seamlessly as possible.

The picture here is clear. **Most people neither like nor dislike product placement as an idea - instead they like or dislike specific executions of product placement.** To this end, subtlety is key. Consumers notice more than they or many marketers think, and a balance should be struck between trying to inform and adding value to the content without distracting from it.





Data

YouGov polled 2,500 US adults online on 13th August 2021 between 15:00EST and 20:52EST. The survey was carried out through YouGov Direct. Data is weighted by age, gender, education level, political affiliation, and ethnicity. Results are nationally representative of adults in the United States. The margin of error is 2% for the overall sample. 4:02

YouGov conducted a similar study in the UK among 2,500 adults online on 13th August 2021 between 10:00BST and 13:54BST. The survey was carried out through YouGov Direct. Data is weighted by age, gender, education level, political affiliation, and ethnicity. Results are nationally representative of adults in the United Kingdom. The margin of error is **2%** for the overall sample.

For insights into consumer behaviours around streaming, **learn more about YouGov Safe.**

Thank you

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