

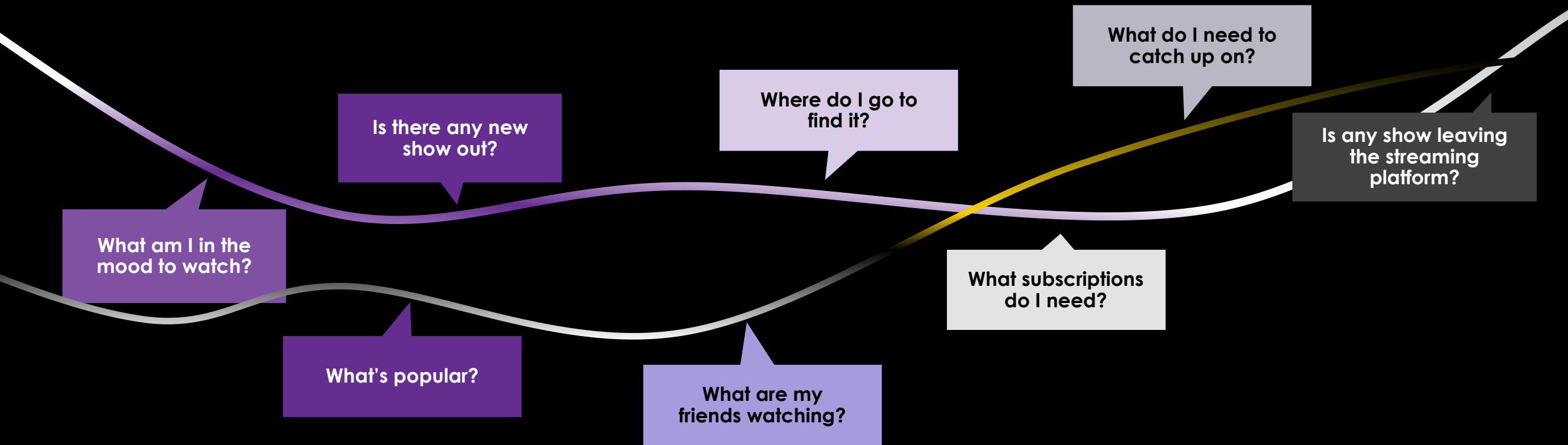


# From 'Power On' to 'Power Off'

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Understanding the Streaming TV Experience

# The streamers' journey to content is multi-faceted



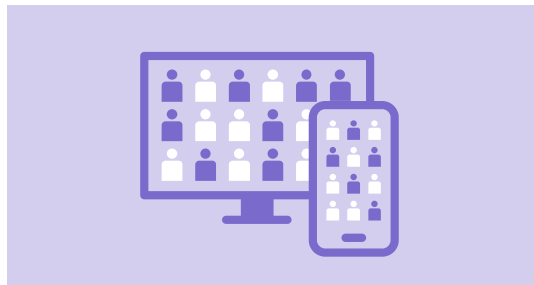
A woman with dark hair is sitting up in bed, looking towards the right. She is wearing a light-colored sweater with a patterned cuff. In front of her is a glass bowl filled with popcorn. The room is dimly lit, with a lamp on a bedside table to the right. A small Christmas tree is visible on the table. The background shows a dark headboard and a window with a picture hanging on the wall.

RESEARCH OBJECTIVES

## Profile Streaming TV journeys to understand...

- Mood and motivations
- Content navigation
- Ad receptivity

# Methodology: Streaming TV Diaries

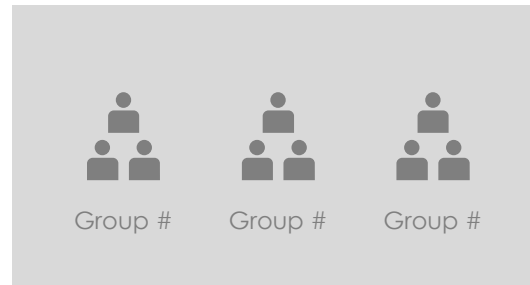


## Recruited Streaming TV Viewers

Evenly recruited weekend and weekday to ensure representativeness

Survey offered in English and Spanish

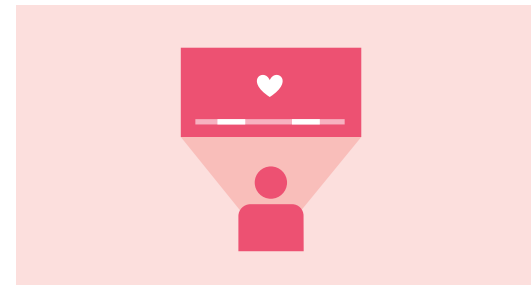
**N=2,568**



## Qualifiers

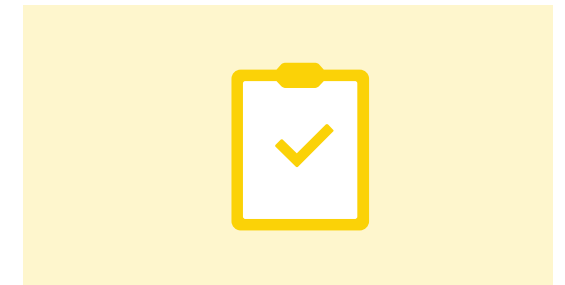
Must have watched Streaming TV in the past 24 hours

**Ages 18+**



## Media Consumption Log

Explored streamers' moods, motivations, and pathways to Streaming TV content through an online diary



## Ad Receptivity & Feedback

Collected responses on openness to and perceptions of Streaming TV ads

# The 'Power On' Mindset

# Streamers sit down in front of the TV in a good mood, ready to be entertained

Relaxed	34%
Calm	15%
Happy	13%
Excited	6%
Curious	3%
Nostalgic	2%
Tired	12%
Bored	8%
Stressed	4%
Anxious	3%
Upset	1%



**73%**

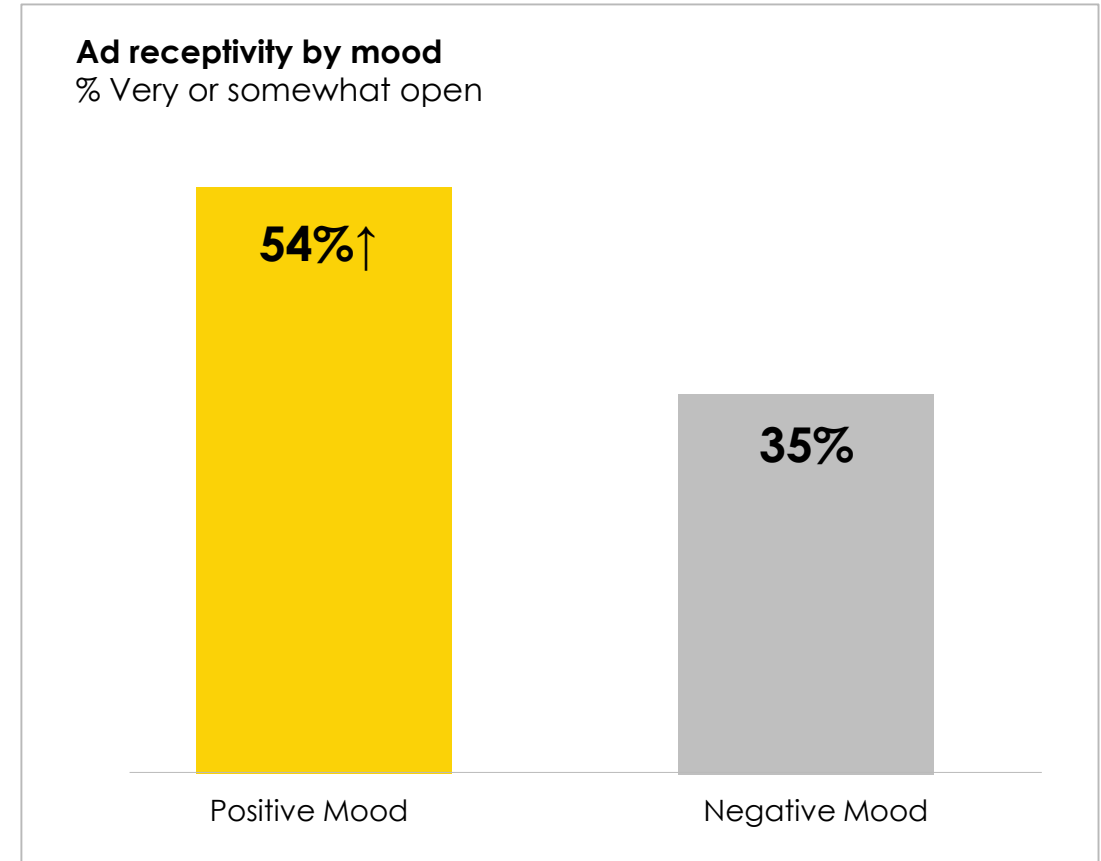
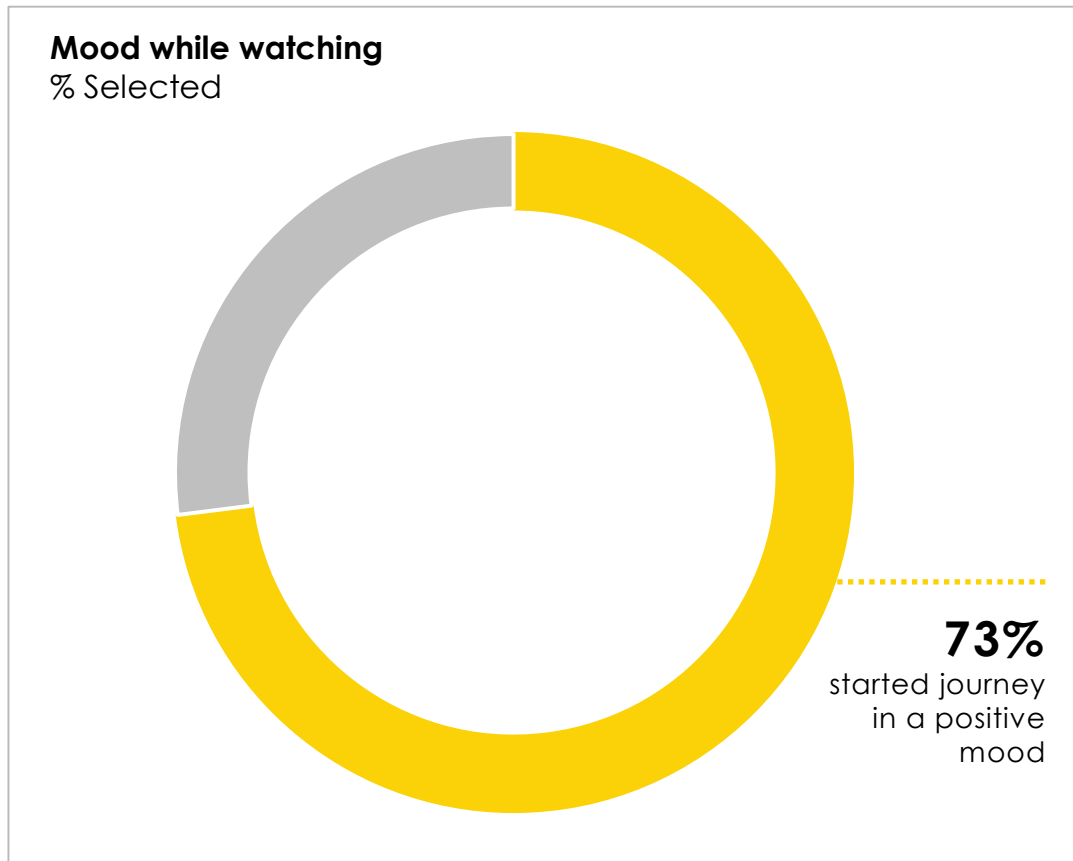
Begin their streaming journey in a **positive** mood.

**#1**

Motivator for watching Streaming TV is to be **entertained.**

# A positive audience means a receptive audience

The majority of viewers tuning into Streaming TV do so with a positive mindset, giving advertisers the immediate advantage of an audience open to their messaging

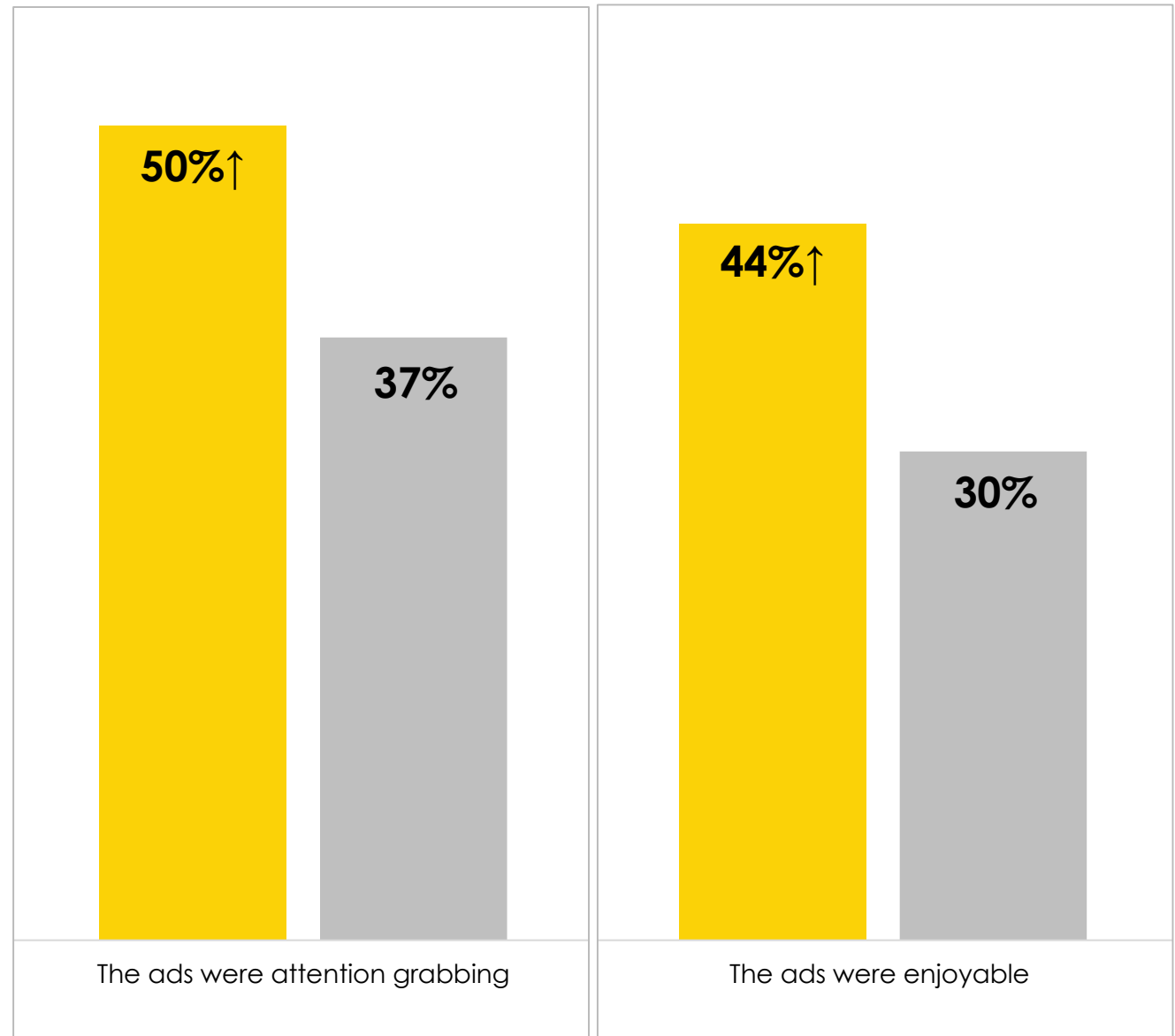


Total audience, n=2568; Positive mood n=860; Negative mood n=290  
Q: Think back to before you started your session. What was your general mood at the time? – select one  
Q: How open were you to seeing ads during your session? – select one  
↑: Significant different between groups at >=90% confidence  
Positive: Happy, Calm, Relaxed, Excited, Curious, Nostalgic; Negative: Tired, Bored, Anxious, Stressed, Upset

# Positive mood also pays off with stronger ad resonance

**Response to ads by mood**  
% Very or somewhat agree

■ Positive Mood ■ Negative Mood



Positive mood n=860; Negative mood n=290

Q: Overall, how much do you agree or disagree with the following statements about the ads that appeared during your session? – select one for each option

Q: Think back to before you started your session. What was your general mood at the time? – select one

↑: Significant different between groups at >=90% confidence

Positive: Happy, Calm, Relaxed, Excited, Curious, Nostalgic; Negative: Tired, Bored, Anxious, Stressed, Upset



# Streamers are positive across genres, but especially so when watching lean-in content

Mood by content genre  
% Selected

These genres show a higher-than-average index (75%)

	Positive Mood	Negative Mood
Sports	82%	18%
News	82%	18%
Documentary	76%	24%
Reality TV	76%	24%
Romance	76%	24%
Anime	74%	26%
Horror	74%	26%
Drama	73%	27%
Comedy	73%	27%
Action	73%	27%
Sci-Fi	71%	29%
Sitcom	71%	29%

Positive mood n=1851; Negative mood n=687

Q: Think back to before you started your session. What was your general mood at the time? – select one

Q: What genre of content did you choose to watch? – select all that apply

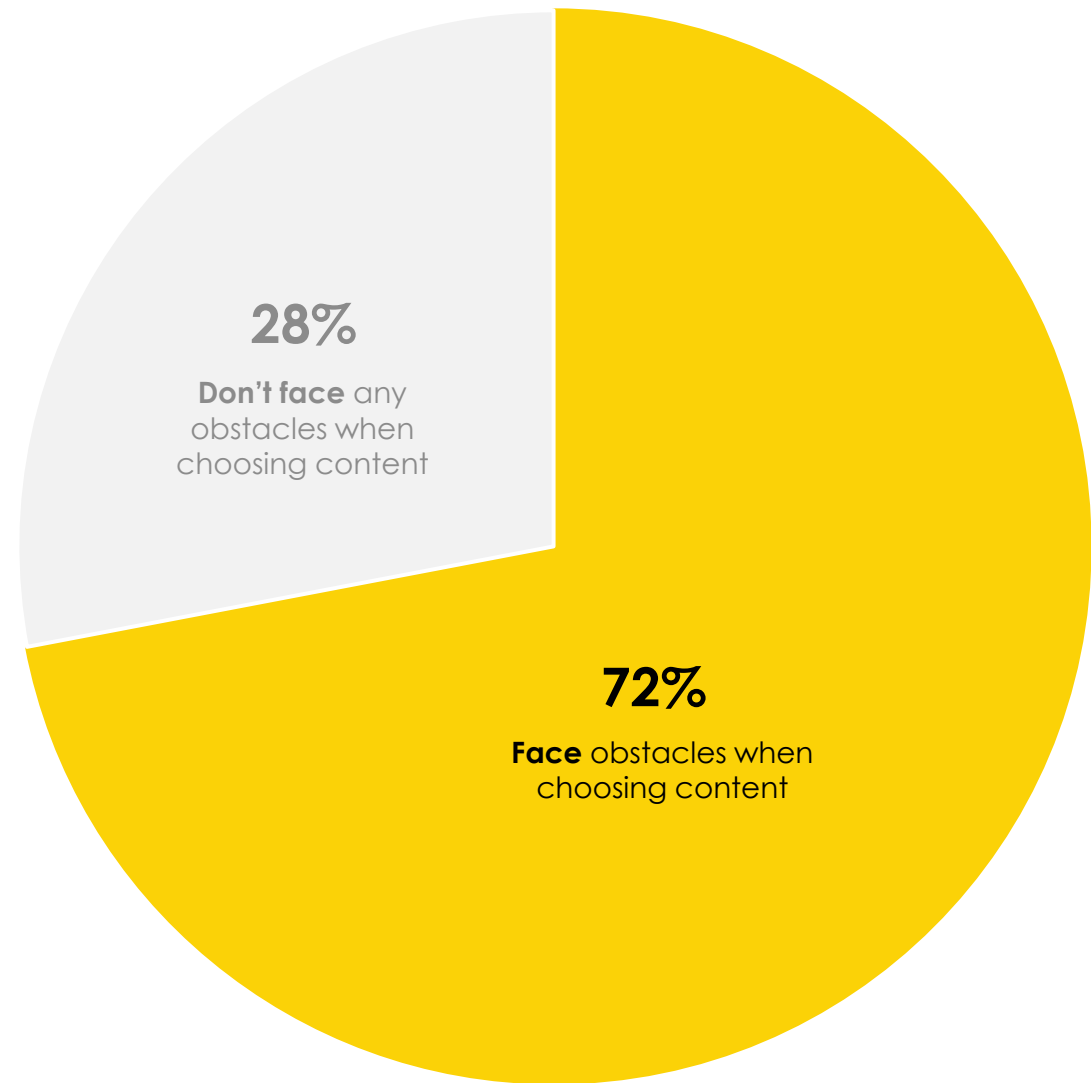
Positive: Happy, Calm, Relaxed, Excited, Curious, Nostalgic; Negative: Tired, Bored, Anxious, Stressed

# Navigating to Content

# Three-in-four streamers face challenges when choosing content

How many face obstacles when choosing what to watch?

% Selected – at least one obstacle



Total audience, n=2568

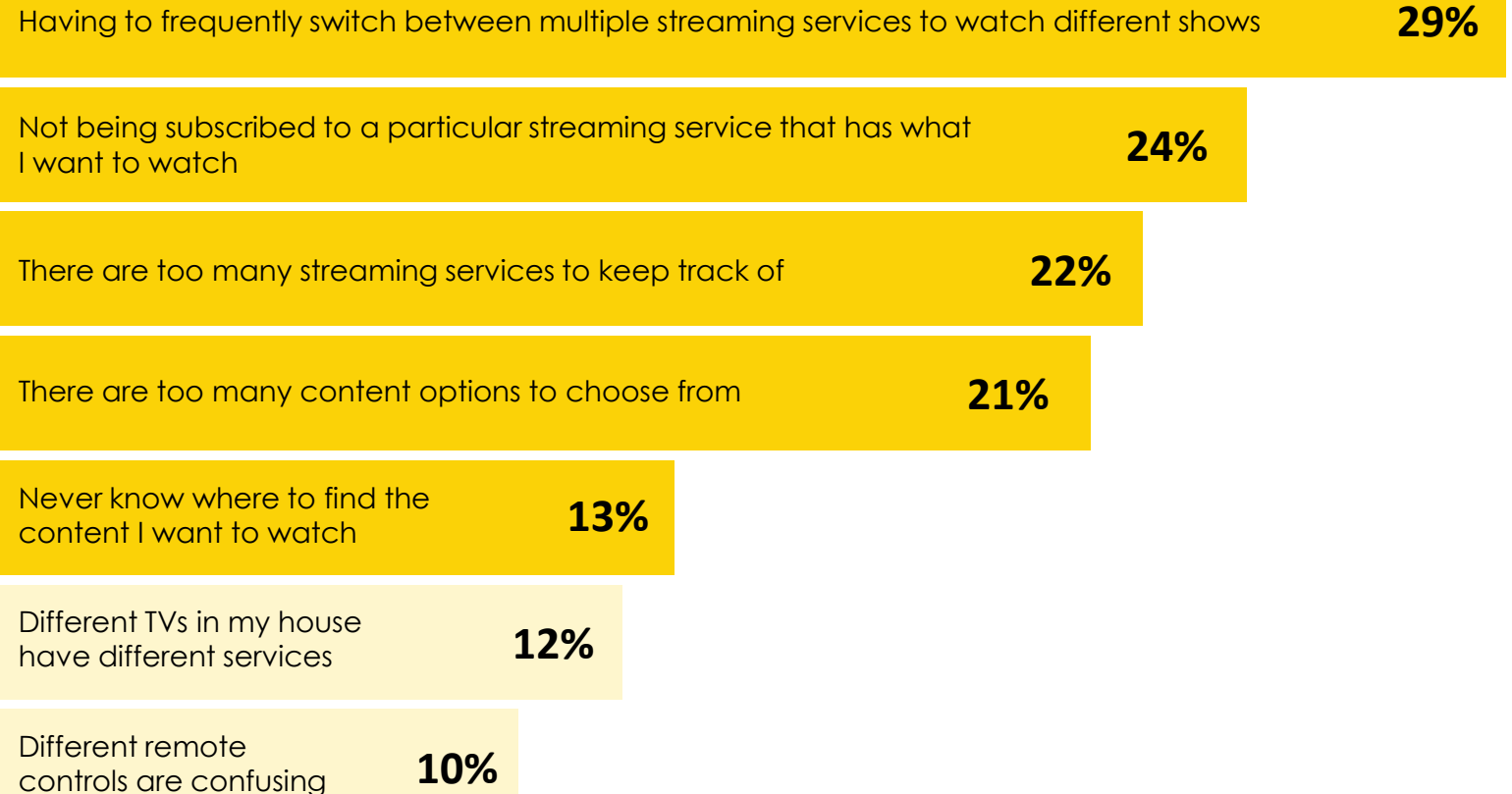
Q: In general, when watching on streaming TV, what obstacles, if any, do you feel like you may face when choosing what content to watch? – select all that apply  
Obstacles: Having to frequently switch between multiple streaming services to watch different shows, Not being subscribed to a particular streaming service that has what I want to watch, There are too many streaming services to keep track of, There are too many content options to choose from, Never know where to find the content I want to watch, Different TVs in my house have different services, Different remote controls are confusing

# Navigating the Streaming TV landscape complicates the viewing experience

Streamers must navigate through a vast number of services and content options each time they watch

## What obstacles do streamers face?

% Selected



# Fragmentation across Streaming TV platforms adds to the complexity

**87%**

of streamers streamed at  
least one new service in  
2023

**86%**

of streamers lapsed out of  
at least one service in 2023,  
lapsing out of 4 services on  
average

**+4 and -4**

streamers added 4 new  
services on average and  
quit 4 services on average

**9.3**

the average streamer  
watched 9.3 distinct  
services in 2023

Source: Roku Internal Data, 2024

Read As: The average Roku household watched 4 new services for at least 1 hour that they hadn't watched previously that year or in the last 2 months of the next year.

The average active household stopped watching 4 services that they had previously watched for at least 1 hour in 2023 and didn't resume watching for the rest of 2023 or the first 2 months of 2024.

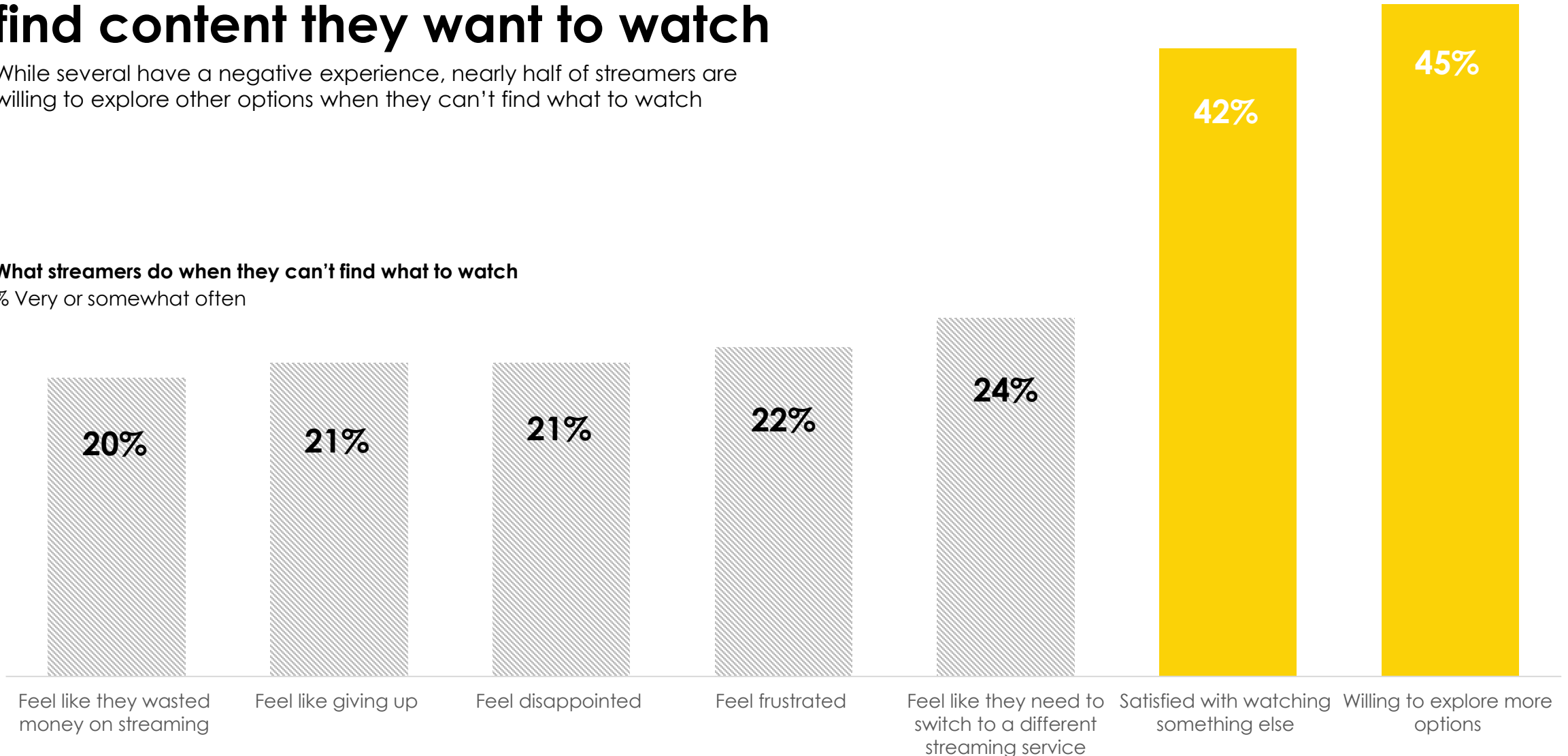
The average Roku account streamed 9.3 distinct services for 5+ minutes in 2023.

# Despite obstacles, streamers are determined to find content they want to watch

While several have a negative experience, nearly half of streamers are willing to explore other options when they can't find what to watch

## What streamers do when they can't find what to watch

% Very or somewhat often

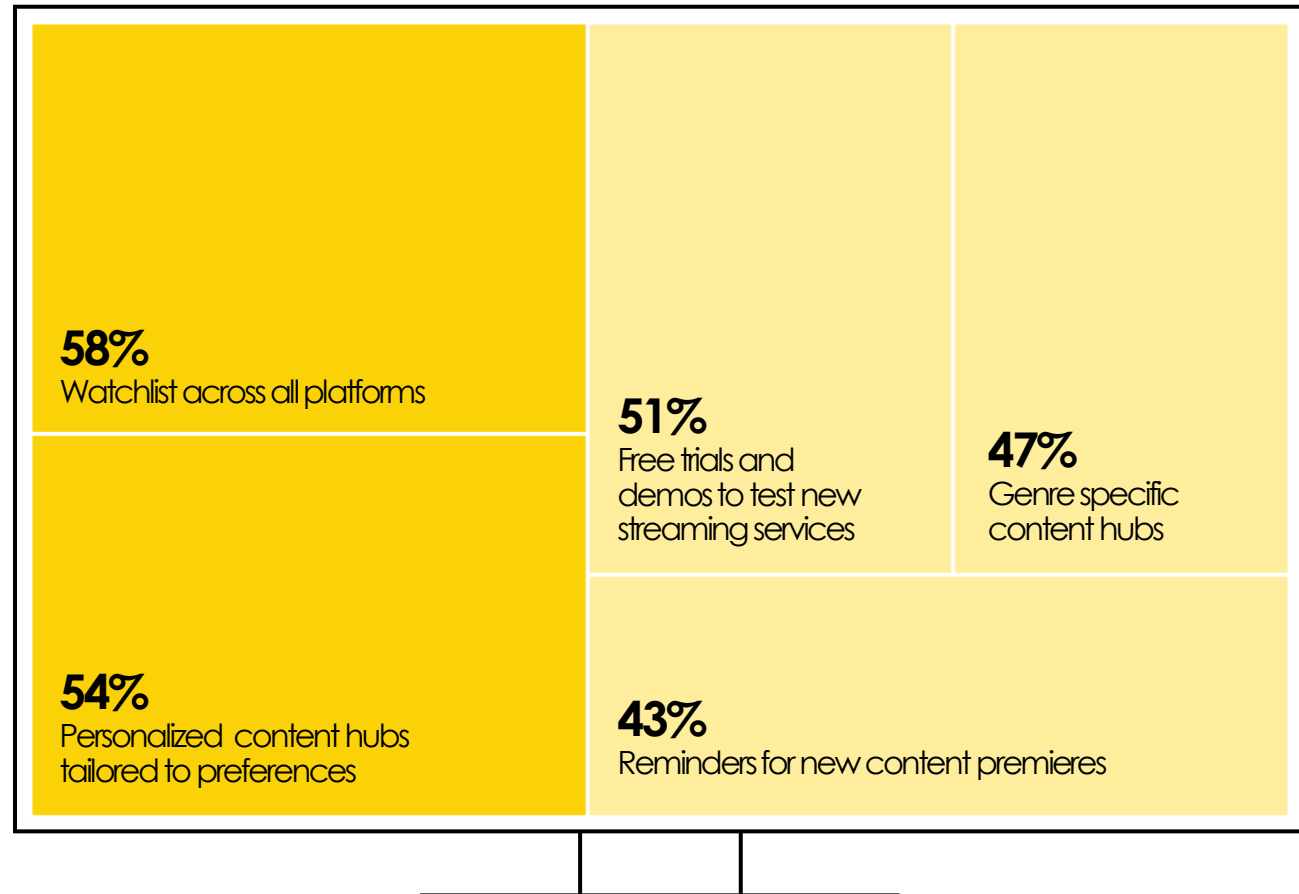


# The streaming industry has the power to simplify the complexities

The number one solution streamers are interested in is a one-stop-shop across all streaming platforms, and surprisingly, it doesn't exist yet

Solutions streamers are 'very interested' in

% Very interested




# The Browser Journey





# Every streamers' journey to content is unique

**How viewers navigated the content they chose to watch**  
Open ended responses



*I just browsed the menu until I got the section I wanted*

*I like to look through streaming apps to find something that catches my eye based on the genre category*

*I look for what I'm interested in at the moment or what looks good to watch...I've been really interested in [content genre] lately. So, I pick one of those to watch...*

*I opened the app , went to my watchlist and selected it after browsing a bit*

*I used a search and narrowed it by category*

*I searched through all my apps and I use my microphone and said the character's name*

# Nearly half of all streaming sessions begin with browsing before settling on what to watch

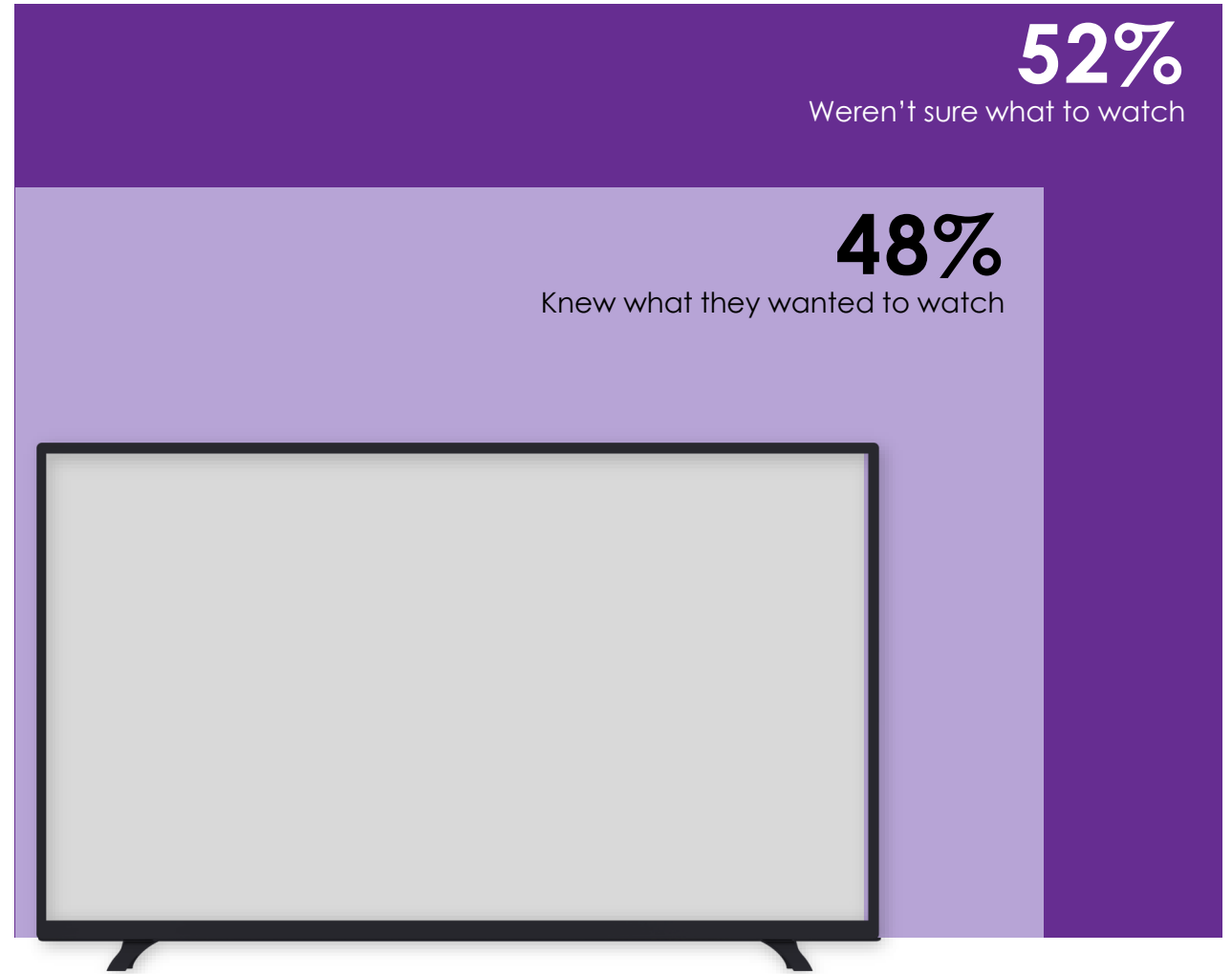


# Naturally, browsing is primarily driven by not knowing what to watch

... but a surprising number of streamers browse anyway, indicating it may be an ingrained behavior

## Path to content selection among browsers

% Selected



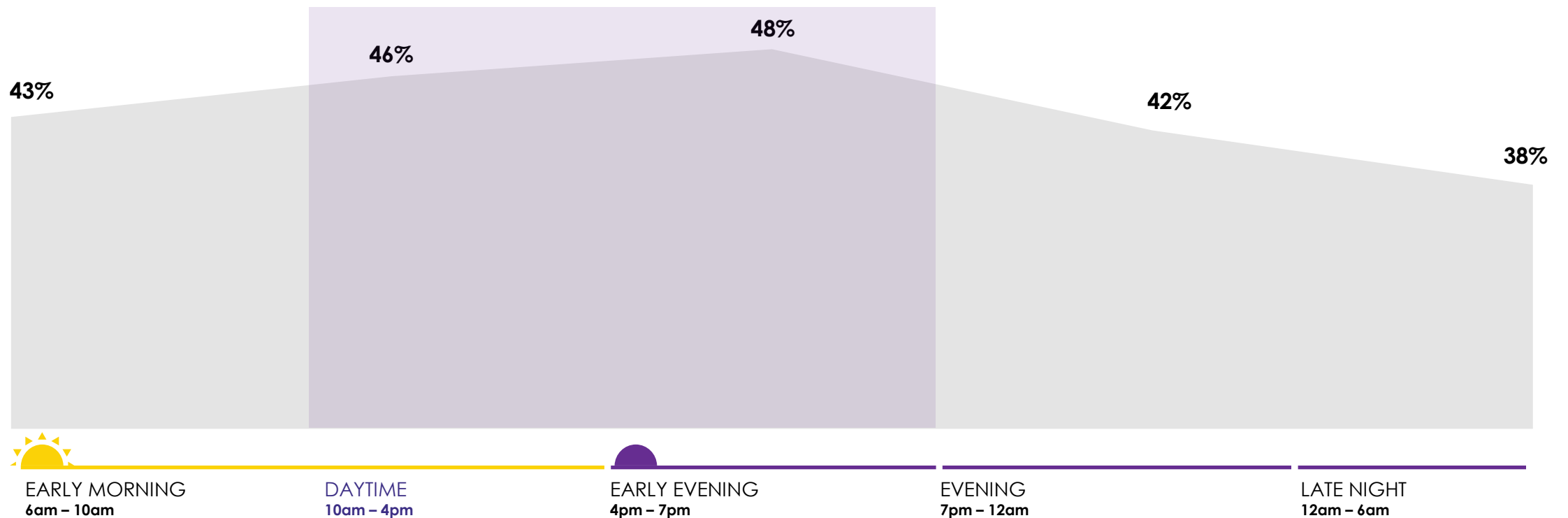
**Brands should consider helping with content discovery**

# Browsing takes place throughout the day, but especially in the early evening

Brands, particularly in sectors like QSR (Quick Service Restaurants), should prioritize these timeframes when delivering ad formats within content discovery sections of the platform

## Browsing by time of day

% who browsed content before selecting what to watch



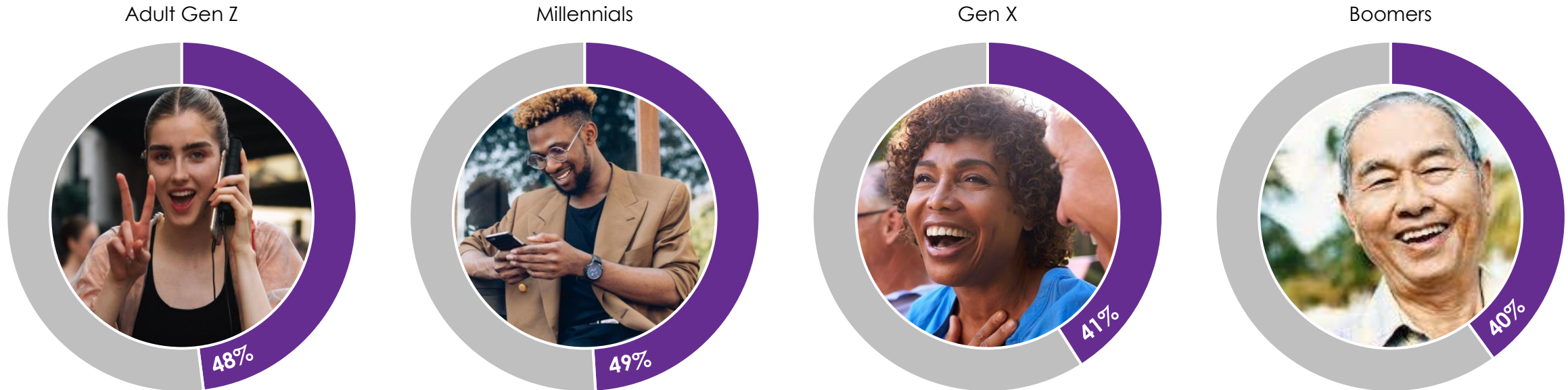
Those who browsed content, n=1132  
Q: How did you choose the content you watched in your session? – select one  
Q: What time did you start your session? – Select one

# Streamers across all generations browse, especially Gen Z & Millennials

## Path to content selection by generation

% Selected

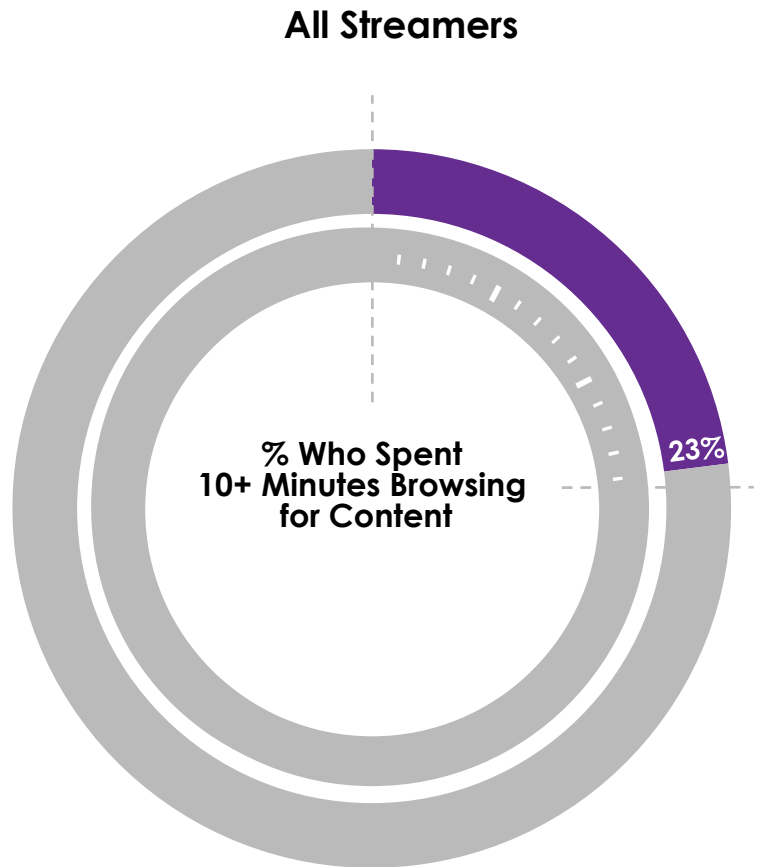
■ Browsed content before selecting what to watch



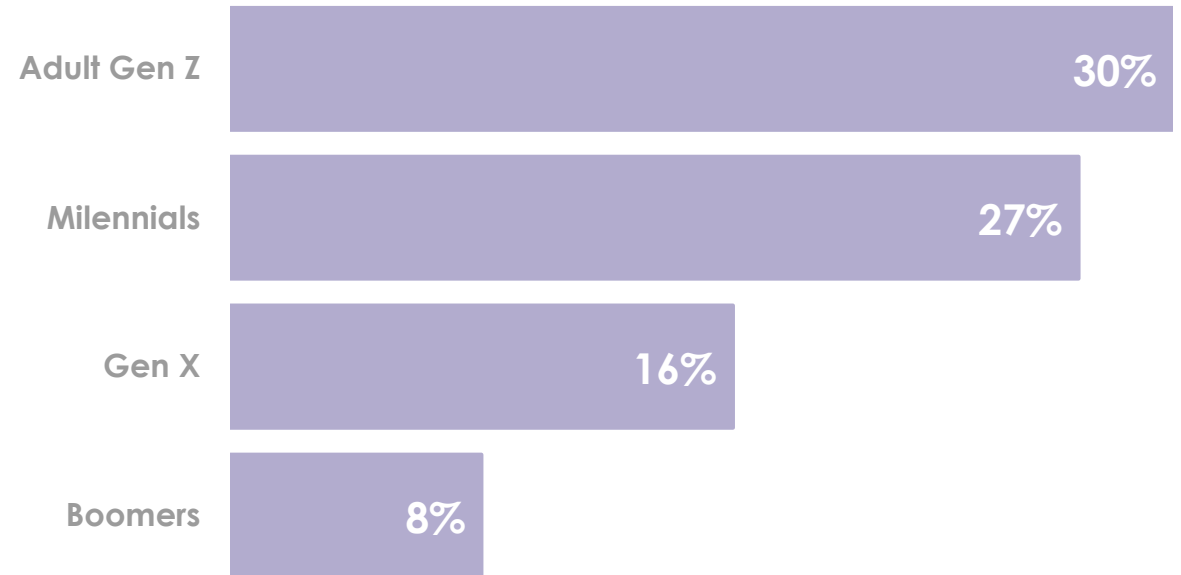
Those who browsed content, Adult Gen Z n=196, Millennials n=372, Gen X n=258, Boomers n=306  
Q: How did you choose the content you watched in your session? – select one  
Q: How old are you? – enter a number

# In fact, Gen Z outpace Gen X with double the content browsing time

For younger generations, consider leaning into formats outside the content itself



### % Who Spent 10+ Minutes Browsing for Content By Generation



Those who browsed 10+ minutes for content, n=490; Adult Gen Z n=120, Millennials n=206, Gen X n=101, Boomers n=63  
Q: When searching for content you watched, how much time did it take you? – select one  
Q: How old are you? – enter a number

# Streamers are most likely to browse when co-viewing and on weekends

## Top predictors of browsing for content

Regression analysis

Note: 46 variables were explored to identify the strongest predictors of likelihood to browse



## TOP PREDICTORS OF CONTENT BROWSING

Weekends

**+22%**

compared to  
weekday

When watching with  
a spouse/partner

**+23%**

compared to  
watching alone

To watch movies

**+29%**

compared to  
TV shows

# Actioning Along the Streamer Journey

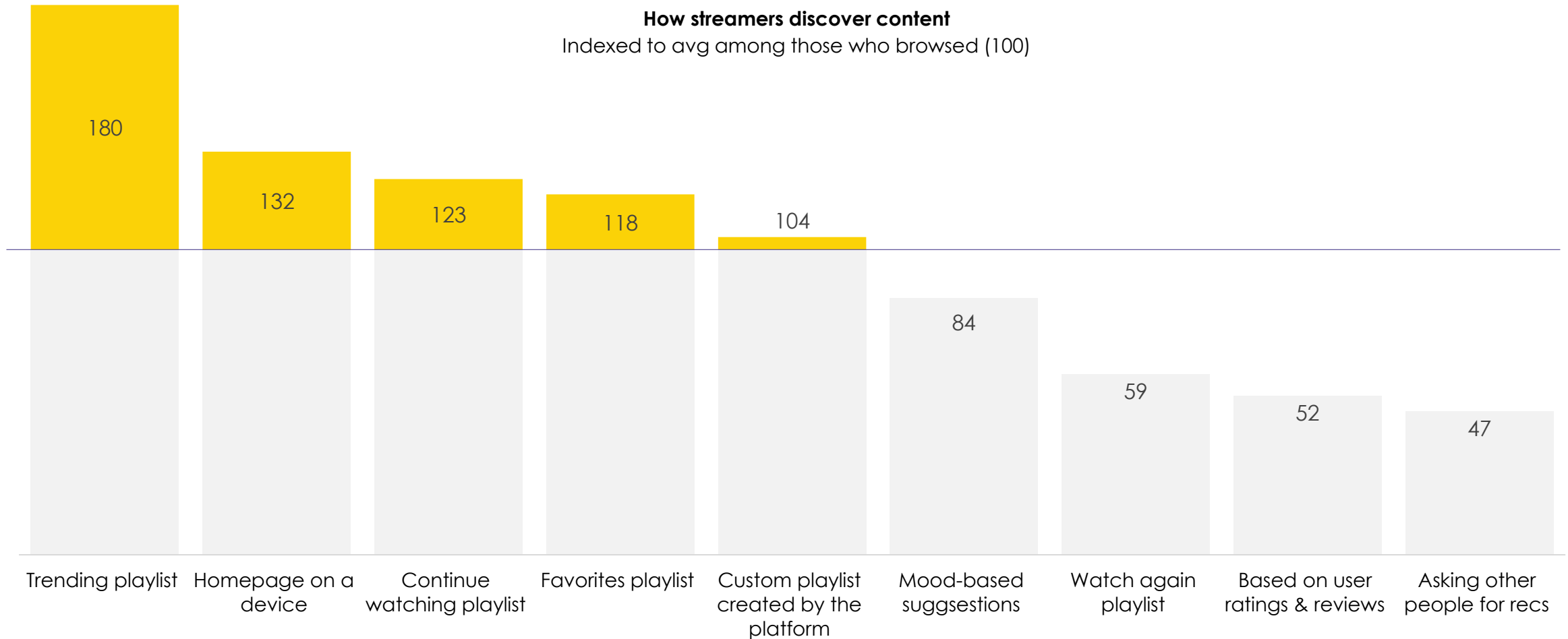




# Trending content, followed by home page are where streamers look for content most

## How streamers discover content

Indexed to avg among those who browsed (100)



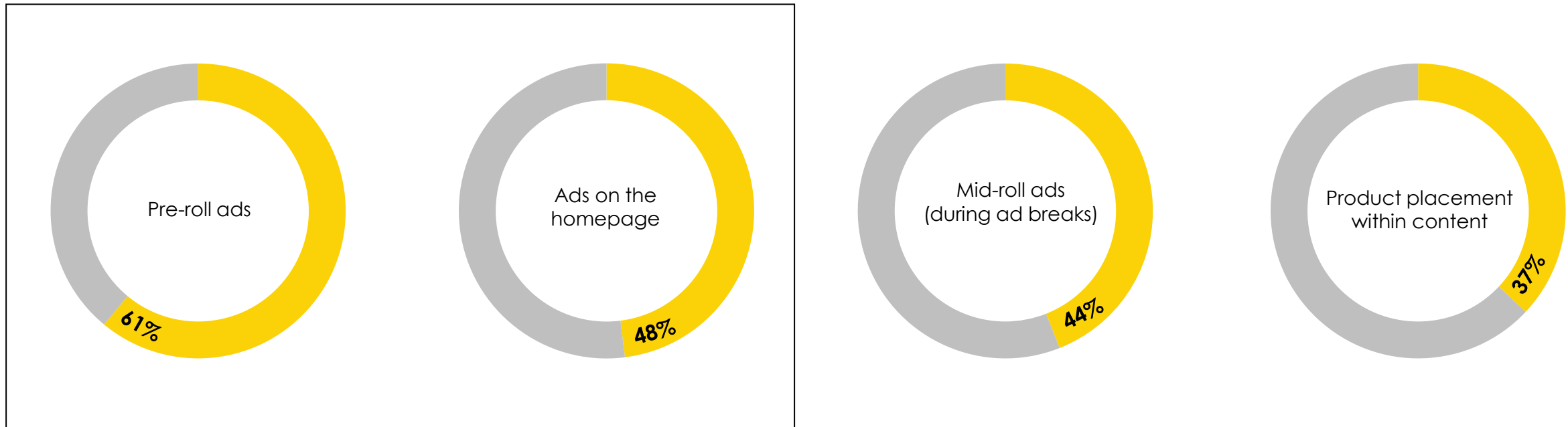
# Ads prior to content viewing are worth a premium

For additional touchpoints with streamers, prioritize ads on the homepage and pre-roll, where they are particularly receptive to brand messaging

## Ad receptivity by ad type

% Very or somewhat open

*Note: Trend is similar across all generations*

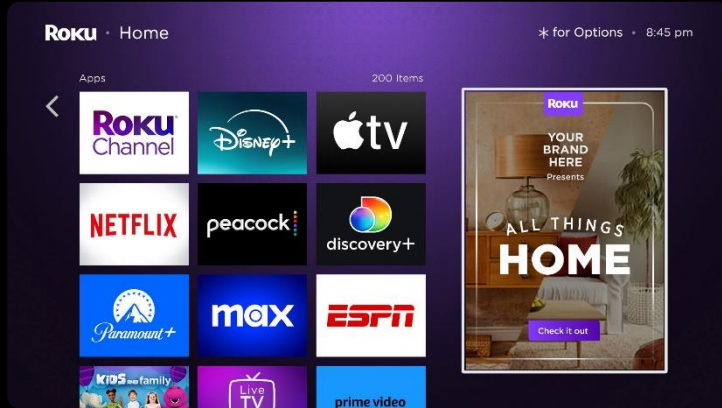


Total audience, n=2568

Q: During a typical streaming TV session, ads can pop up at various times. How open would you have been to seeing ads at these times if they showed up during your session? – select one for each option

# In fact, homepage ads can help with content discovery with the right sponsorship

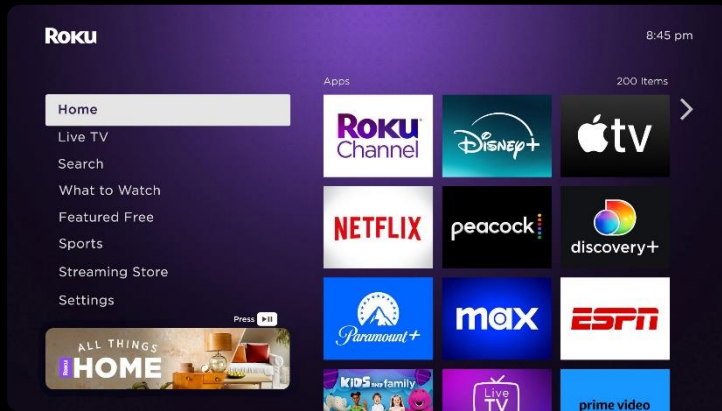
Home Screen Marquee Ad



Screensaver Billboard Ad



Home Screen Spotlight Ad



Roku Zones



# Brands eyeing younger generations should consider homepage ads, especially in the evenings

We ran a cluster analysis to identify the most common journeys

## Most common journeys by generation

Gen Z solo fliers are 13% more receptive to ads than the average Gen Zer



### THE GEN Z SOLO FLIER

A Gen Z solo flier sits down to watch Streaming TV in the **evening by themselves**. They are calm cool and **relaxed** and **open to ideas on what watch**. The solo flier **browses around** looking for content for 5-15 minutes before deciding on what to watch. They **watch TV for about an hour**.



### THE MILLENNIAL WINDING DOWN

These millennials watch Streaming TV **in the evening**, are in a **leaned-in mindset**, and are **open to discovering content** (since they browse for less than 15 minutes).

In Summary...



# Implications

## For Streaming Platforms

1

The industry should improve the streaming TV experience by providing a one-stop-shop solution, including an aggregated watchlist across all platforms.

## For Advertisers

2

Given that browsing is a common behavior among streamers, brands can leverage this as an additional touchpoint to reach streamers beyond the content itself.

3

Use ad formats that assist with content discovery to reach streamers, especially when interested in younger demographics.

# Thank You.

M/GNA MEDIA TRIALS + Roku

