

ROKU

LUTH
RESEARCH

Social Media & Streaming

Roku unlocks the Gen Z Audience.

Today's Speakers



Steve Montgomery
SVP, Research



Amy Casale
Ad Research



About Luth Research

About Luth Research

Online Panel Developed

Multi Faceted Data Integration

1977

1999

2013

2017

**Data Collection Services
founded in San Diego, CA**

**Passive Digital Tracking
with ZQ Intelligence**

About Roku

About Roku



**Streaming players & sticks,
Roku TVs, home audio, and
smart home devices.**



**Fun Fact:
Roku means “Six”
in Japanese**

Why Gen Z?



Diverse



Opinionated



Spend Money



The Methodology



We Captured

Gen Z attitudes and perceptions on streaming and social media – and brand relationships.



Integrated

Behavioral digital data from Luth's ZQ Intelligence panel.



ZQ Intelligence Delivers

Holistic understanding of how Gen Z is approaching both content and advertising from both an attitudinal and behavioral POV.

Roku Initiatives

1

**Deep dive on
Gen Z media
consumption.**

2

**Streaming and
social synergies &
differentiation.**

3

**Brand and
advertising
receptivity.**

Gen Zs engage in a range of activities throughout the day while multi-tasking.

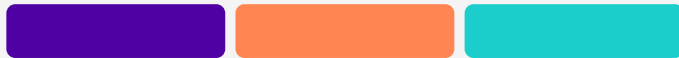
Multi-Tasking Platforms

Streaming TV

On Social Media

Watching YouTube

Play games on console



Stream TV



Visit YouTube



Engage in a favorite hobby



Socialize with friends/family



Browse on social media



Exercise



Watch videos on social media

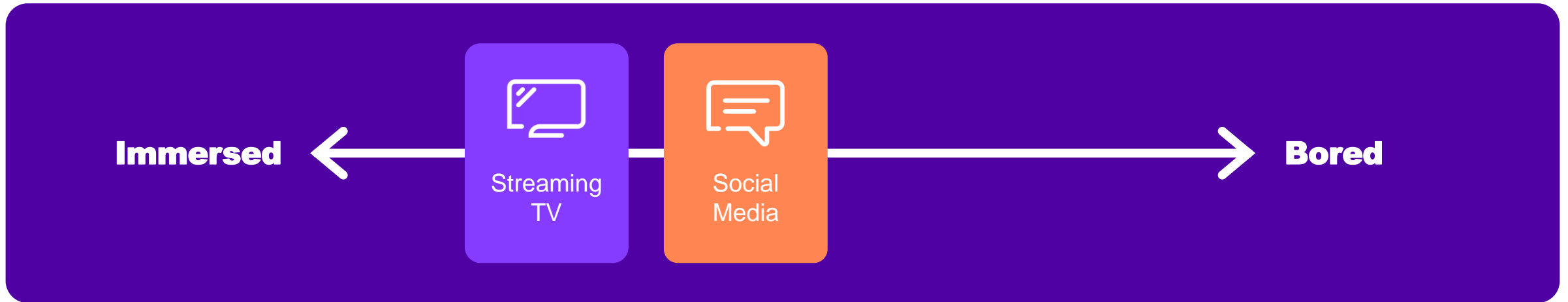
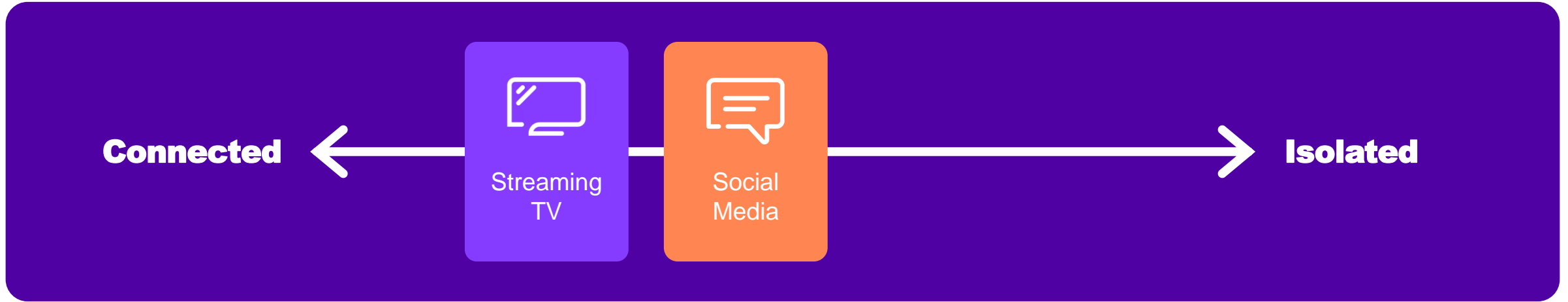


Message someone



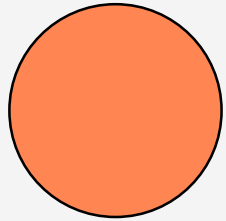
Platform Synergies

Both streaming TV and social media work together to connect and immerse among Gen Zs.



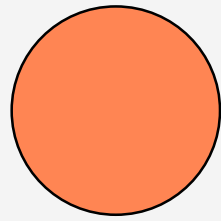
Streaming TV and social media fulfill many need states — often in combination.

Inspiration



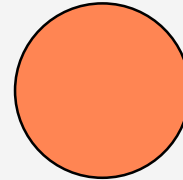
Social Media

Escape



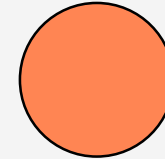
Social Media

Socializing

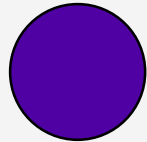


Social Media

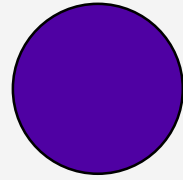
Entertainment



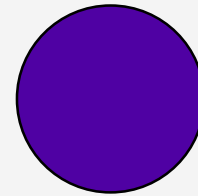
Social Media



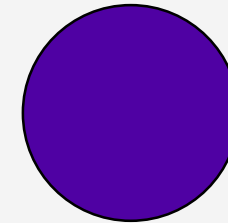
Streaming TV



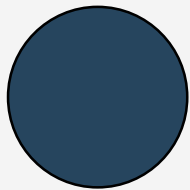
Streaming TV



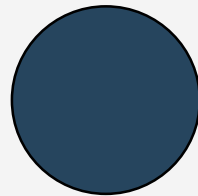
Streaming TV



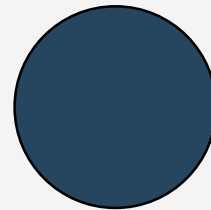
Streaming TV



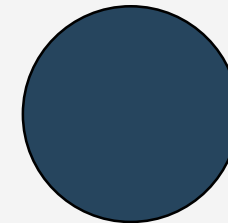
Both



Both

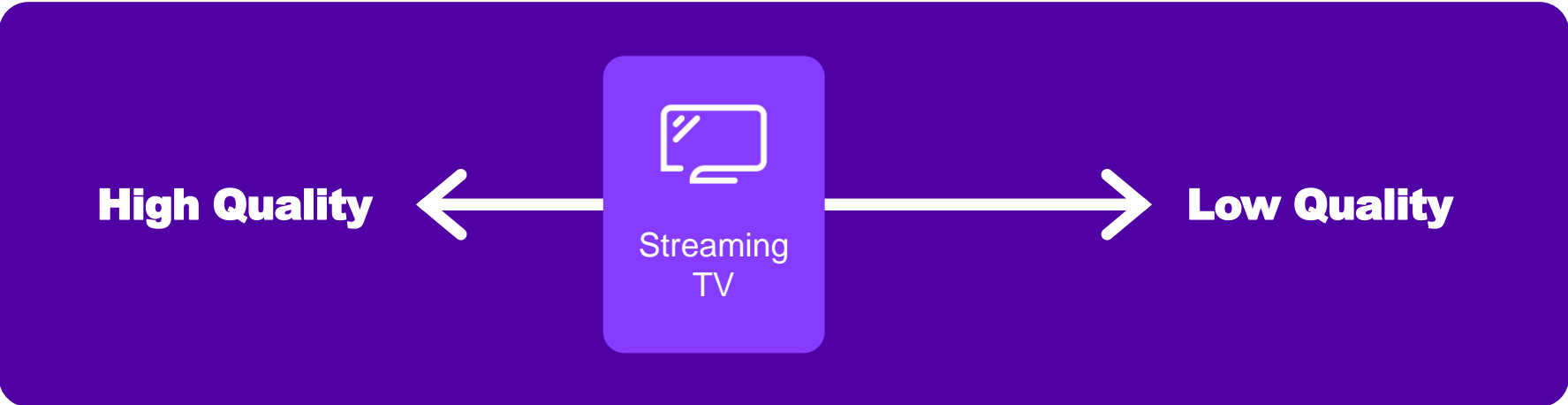
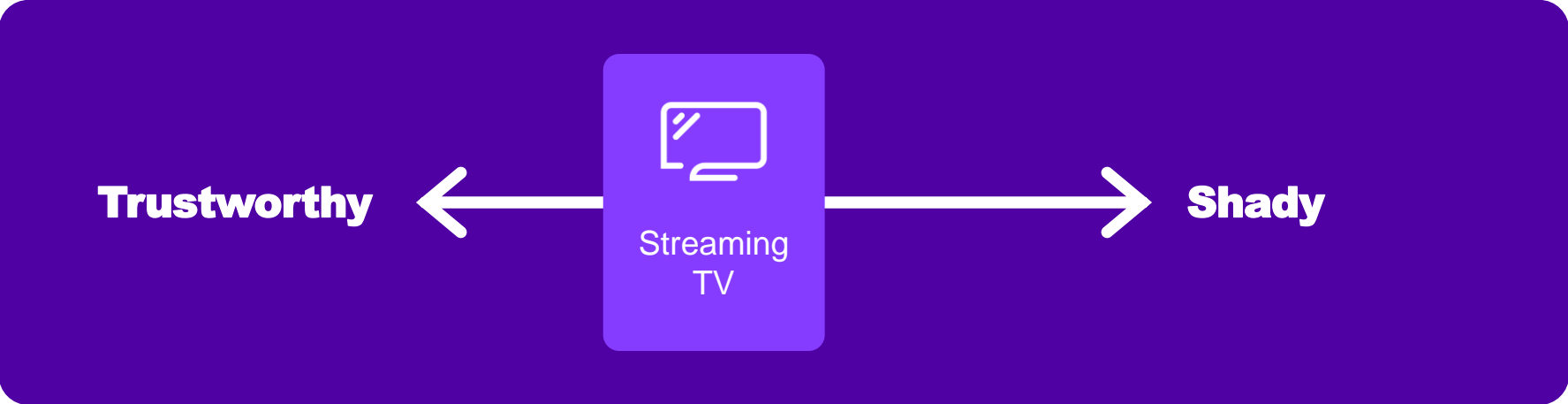


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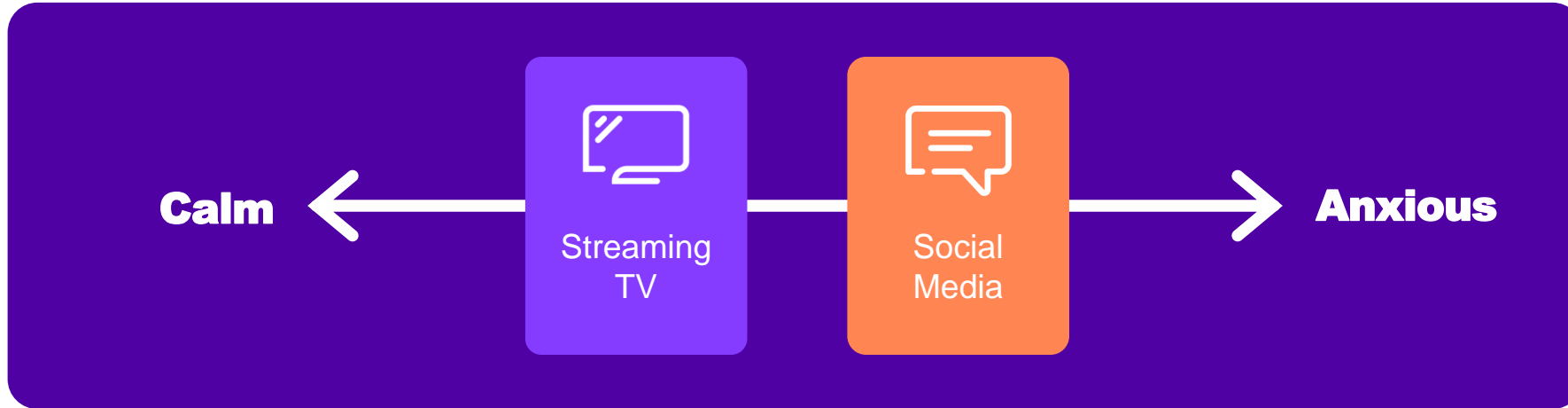
Both

And from a content perspective among Gen Z, streaming TV performs well on trust and quality, and is driven by different needs.

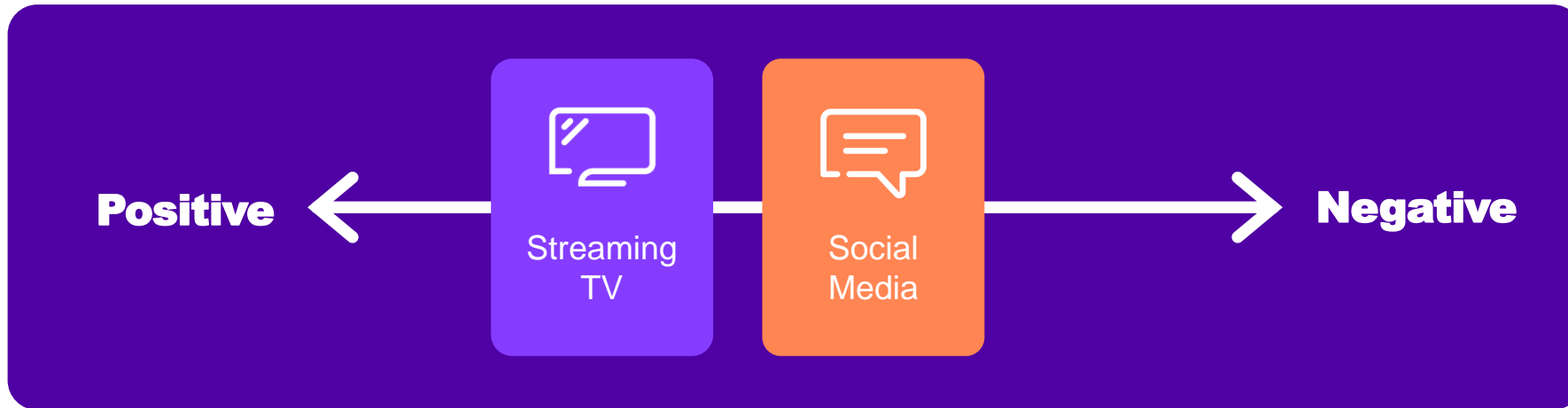


- Streaming TV**
- Nostalgic content
- New content
- To relax
- Spend time with others
- Background viewing
- Social Media**
- Stumble across
- To engage
- Buzz
- Out of boredom
- No energy to invest

However, streaming TV scores particularly well in terms of promoting a calm and positive mindset among Gen Z.



Calm
47%
more likely to than those who feel anxious to be receptive to ads



Positive
73%
more likely to than those who feel negative to be receptive to ads



52%

of Gen Z feel they have too much screen time and seven-in-ten feel they should cut back on social media to reduce their screen time.

Would cut back on ...



Social Media



Streaming TV



YouTube



Not sure

Gen Z Brand “Obsessions”

Brands “obsessed” with often driven by a long-standing trust or bond based on personal identity — or simply superior performance.

“Air Jordan — was a big fan of Michael Jordan growing up.”

“The makeup brand Glossier. I have followed the brand since their start up in 2017. They are active on social media and engage with their audience.”

“Nintendo, because they've been a part of my life since I was born and they continue to make great games.”

“E.L.F makeup/skincare, inexpensive and cruelty free”

“Super Fan of L'Oréal products, I truly love their eyeliners, brow pencils, etc. I've been purchasing their products for years now because they are high quality and work best for me.”

When analyzing Gen Z behavioral data, certain brands over-indexed.

Streaming and Social Media Sites Over-Indexing Among Gen Z*

hulu

Instagram

NETFLIX



TikTok

YouTube

Other Brands Over-Indexing Among Gen Z**



SEPHORA

TARGET

TJ-maxx

Walmart

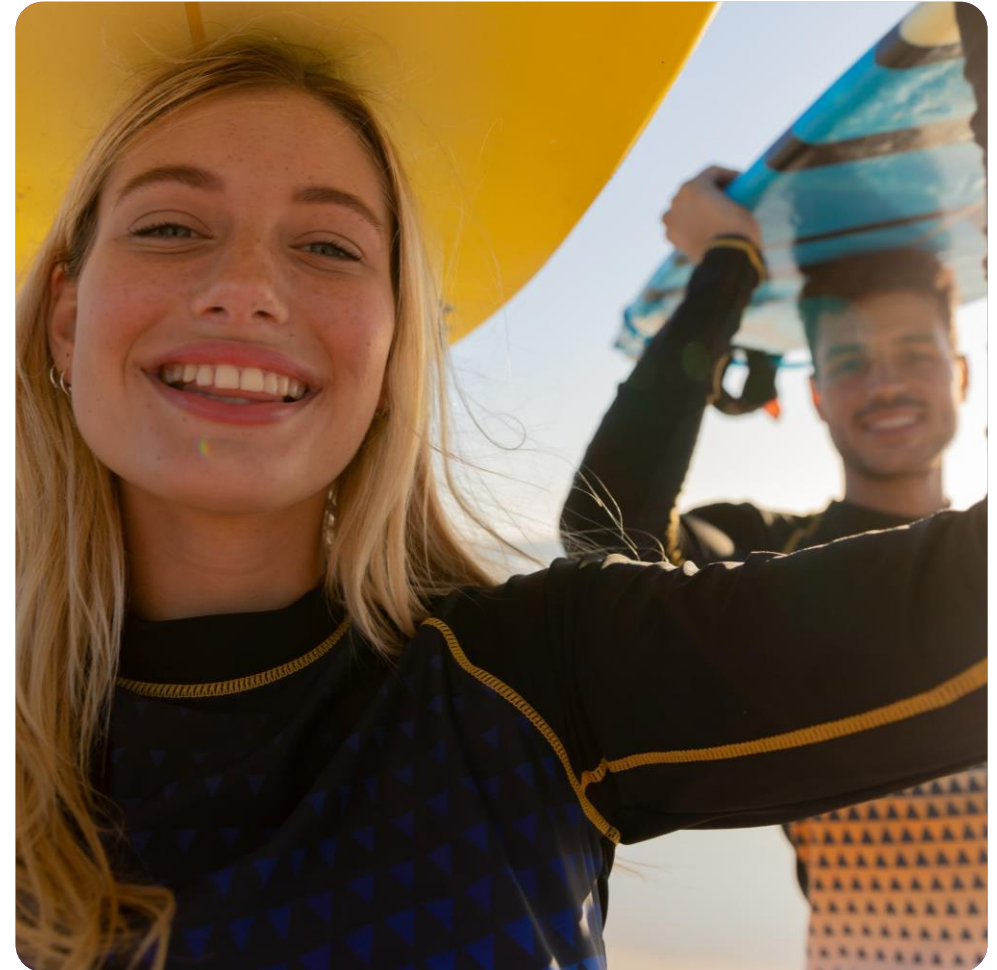
Key Takeaways

Key Takeaways

Streaming TV and Social Work together to meet Gen Z need states.

Each platform also brings distinct receptivity to both mindsets, content and advertising.

Gen Zs do often obsess over brands, driven by life-long bonds or exceptional performance.





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