



The FreeWheel Viewer Experience Lab Presents

Voice of the Viewer

HOW AD EXPERIENCES IMPACT STREAMING FOR U.S. VIEWERS



VIEWER EXPERIENCE LAB

About the FreeWheel Viewer Experience Lab

The FreeWheel Viewer Experience Lab is designed to help media companies improve the quality, quantity, and relevance of TV advertising through quantifiable research, solutions, and technology. To learn more, visit freewheel.com/viewer-experience-lab.

Introduction

In the golden age of television across traditional and streaming, viewers have more choices than ever when it comes to what they watch, how they watch, and how much advertising they see. As more consumers turn to ad-supported subscriptions, it's critical that advertisers and publishers understand what audiences expect from their streaming ad experiences.

To uncover insights and recommendations around this topic, the [FreeWheel Viewer Experience Lab](#) conducted custom research across the U.S. and Europe. And while our research found that 87% of U.S. viewers are satisfied with their overall streaming experience, respondents told us there are still improvements that can be made.

In this report, the Viewer Experience Lab provides insight into where viewers are satisfied, where they are frustrated, and what role advertisers play in sustaining positive momentum in a streaming-first world.



Study approach



U.S. viewers

In partnership with Dynata, the FreeWheel Viewer Experience Lab gathered 800 survey responses from U.S. adults 18+ who have watched traditional or streaming TV content in the past 3 months and subscribe to/have access to free (FAST) or paid streaming services in their household. The responses were then analyzed to offer advertisers and publishers key insights into how viewers feel about today's streaming ad experience.



European viewers

With viewing habits differing outside of the U.S., the FreeWheel Viewer Experience Lab replicated this study with European viewers. To discover how viewers in Europe feel about today's streaming experience, download [Voice of the Viewer \(Europe\)](#).

VIEWERS TOLD US:

They're satisfied with the streaming experience

Overall, viewers say they are satisfied with their streaming experience, which has led to improved subscriber retention and growth in subscribers.

Why this matters

Viewers have bought into streaming as TV, with many using it as their primary TV format. As positive improvements continue to enhance the viewer experience, audiences report overall satisfaction with streaming, making it a valuable canvas for brands to connect with them in premium environments.

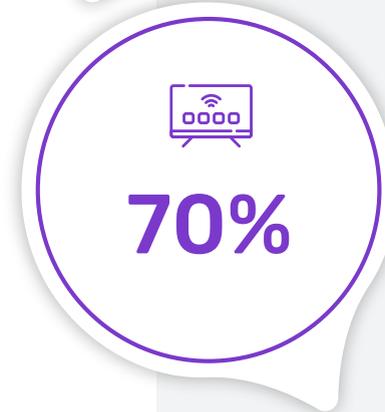
*Comparison to 2023 Comcast Advertising survey conducted by Cint.



Nearly **9 in 10** are satisfied with their streaming experience¹



They are **+20% more likely** to choose streaming over traditional TV when given a choice¹



70% have not canceled any streaming services in the past year, a **+30% increase** in subscriber retention from 2023^{1*}

VIEWERS TOLD US:

Content is primarily what drives satisfaction

Streaming satisfaction is rooted in the content itself, along with viewers' ability to watch what they want, how they want.

Why this matters

Streaming satisfaction starts with the content viewers love, but creating that content at a high quality requires resources. Advertising is the engine that makes this possible while keeping costs manageable for consumers.

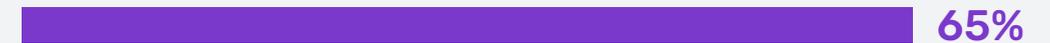
Top 3 things viewers enjoy about streaming services¹



The availability of content I like to watch



I can easily binge-watch content when I want



Value for money



VIEWERS TOLD US:

They are choosing ad-supported streaming

Viewers recognize the value that ad-supported models offer to access great content at more affordable pricing, but it's not just about saving money; many say they like having a break while watching content.

Why this matters

As AVOD further becomes the norm for streaming, content owners must continue to prioritize the viewer experience – inclusive of the ad breaks – which will ultimately drive better brand results and help publishers better monetize their premium inventory.

61%

selected a plan with ads when they signed up for the service^{1*}

41%

cite the cost savings in exchange for ads as a benefit¹

40%

say they like having a break during content¹

Of the services you subscribe to or have access to, do they have ads?^{1**}

45% Some have ads, some are free

44% All have ads

11% All ad-free

89% of viewers have services with ads

*AVOD subscribers only. **Paid streaming subscribers.

VIEWERS TOLD US:

Ad loads are increasing, but remain lower on streaming

Viewers often associate streaming with control, convenience, and fewer ads, so when ad loads increase, even slightly, it can feel significant.

Dissatisfied viewers are **+48% more likely to notice an increase in ad loads**, signaling a link between the ad experience and overall viewer satisfaction.¹

Why this matters

The FreeWheel Viewer Experience Lab [previously found](#) that ad breaks of two minutes or less provide the best brand outcomes and overall viewer experience.² Advertisers should look to partners that offer curated opportunities to be featured in light ad load environments, and publishers can consider advanced tools like dynamic break lengths to tailor the viewer experience.

55%

of viewers report seeing more ads than they used to¹

73%

of viewers think ad breaks last less than 90 seconds, while 45% say less than 60 seconds¹

VIEWERS TOLD US:

Ad breaks are working in live events

Retention is higher among viewers of live content than those watching on demand as the expectation of ads with natural ad breaks can lead to better reception.

Why this matters

There are added complexities in live events in streaming, but there is incredible opportunity to target audiences at scale with things like [dynamic ad insertion](#) and [programmatic](#). Advertisers need to make sure they work with partners who can leverage the full value of live.

**Statistically significant difference.*

***Responses for never experience, rarely, or happens every couple of episodes.*

+21%

Live viewers are **+21% more likely** to say ads fit in seamlessly with live content than the viewers of episodic content^{1*}

88%

of viewers infrequently experience delays or lags when watching live content on streaming^{1**}

VIEWERS TOLD US:

Ad repetition is a buzzkill

Ad repetition continues to be an issue in streaming, and the majority of viewers report tuning out when seeing the same set of ads. Ad repetition is **+24% more likely** for AVOD subscribers than traditional TV viewers.¹

66%

say they keep seeing the same set of ads¹

45%

of AVOD subscribers see the same ad multiple times in one break¹

Why this matters

Repeated exposure to ads in a single sitting can cause viewers to tune out the ads. Publishers and advertisers can implement frequency capping to improve the viewer experience for binge-watchers. Additionally, [identity graphs](#) that can frequency cap across publishers can ensure viewers are not getting repetitive ads across platforms.

VIEWERS TOLD US:

Ad relevancy is important, but often falls short

Relevant ads can play a powerful role in driving positive brand outcomes as [viewers report 2X more liking and 2X more engagement when ads are relevant](#), which helps capture more attention.³

Why this matters

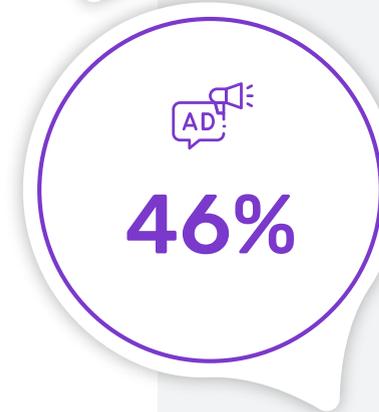
Tailored, relevant ads feel less disruptive to viewers. Advertisers can leverage [identity-based solutions](#) and [contextual targeting](#) enabled by publishers to create a more seamless viewing experience.



Only **35% of viewers** say ads are tailored to products they are interested in or would buy¹



49% of viewers find ads disruptive or intrusive because ads are not relevant to them¹



46% say there has been no change in the relevance of ads vs. five years ago¹

VIEWERS TOLD US:

They're open to AI supporting their streaming ad experience

As AI becomes more embedded in people's lives, viewers report being open to the technology playing a role in their ad experiences.

Why this matters

Advertisers can harness AI to efficiently generate multiple creative variations to personalize the ad experience and help minimize creative fatigue. However, systems would need to be established to ensure consistent quality and accuracy.

66%

say they are open to AI deciding which ads are shown during the content¹

50%

say they are open to AI being used to create the ads they see during the content¹

How buyers and sellers can continue to improve the viewer experience

While this research shows that viewers are overall satisfied with streaming today, both advertisers and publishers have important roles to play to ensure that we're prioritizing audiences and delivering high-quality ad experiences while they enjoy the content they love.

Advertisers

- Consider advertising in light ad load environments.
- Work with identity solution providers that can help with frequency capping.
- Leverage audience or contextual targeting.
- Use AI to create tailored or mixed versions of creative for different audiences to help reduce ad fatigue.

Publishers

- Keep ad breaks to two minutes or less.
- Implement frequency capping at the player level.
- Enable contextual and audience targeting optionality for buyers.
- Use AI to optimize ad delivery through the right ad technology.

Sources

- 1** FreeWheel survey conducted by Dynata, n= 800. Base: U.S. Adults 18+ who have watched video content (excluding social media) in the past 3 months and subscribe to/have access to paid streaming or FAST in their household.
- 2** FreeWheel Viewer Experience Lab, Designing a Better Ad Pod, January 2024.
- 3** FreeWheel Viewer Experience Lab, Making the Ad Experience More Relevant, December 2024.



FreeWheel technology is built for streaming and TV ads. We connect buyers and sellers directly, making it easier to access supply and demand. We provide all the tools, data, and insights you need to maximize results. [Read more insights on TV and premium video advertising here.](#)



Maximizing Brand Recall Through Contextual Alignment

How contextual results drive results for advertisers

This report delivers findings from an innovative study on the impact of contextually aligned ads on the viewer's memory for brands and offers considerations for how advertisers and publishers can capitalize on the benefits of contextual alignment.

[Download Report →](#)



Making the Ad Experience More Relevant

The importance of ad relevancy and the viewer experience

The report shares insights into how relevant ads can have a positive impact on brand outcomes. It also lays out the steps that buyers and sellers need to consider when developing more relevant ad experiences for their audiences.

[Download Report →](#)



Designing a Better Ad Pod

Ad pod recommendations to optimize brand impact and the viewer experience

This report focuses on how optimizing the quantity and frequency of ads in an ad pod can improve both ad experience and brand results, balancing the interests of viewers and brands, without diminishing publisher inventory.

[Download Report →](#)
