CHECK BREAKDOWN: ROKU

TREND CHECKS

BUILT IN STREAMING OS

We saw another increase in the share of respondents who are using smart TV's with built-in streaming operating systems.

DEDICATED STREAMING DEVICES

Roku continues to lead other key competitors like Amazon Fire Stick and apple TV when it comes to dedicated streaming devices that people use. This quarter, data for Roku strengthened sequentially and stands at series highs.

PURCHASE INTENTIONS

Purchase intentions for smart TV's are holding pretty steady for the next 12-18 months. Those with plans to purchase however show strong intentions to pick Roku relative to competitive offerings. Additionally, pricing has become more important to those making decisions on TVs in recent quarters.
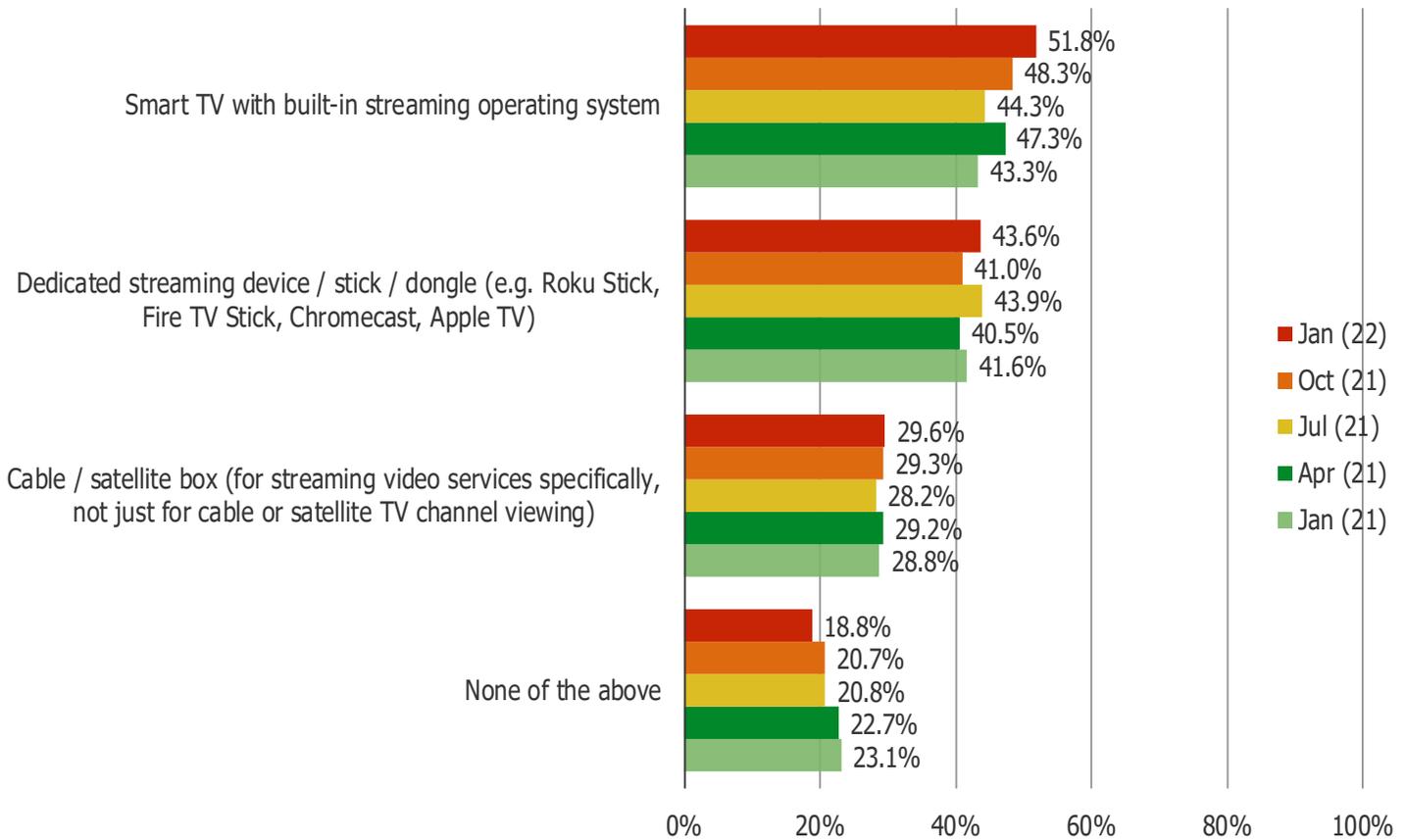
ROKU

WHAT HARDWARE DO YOU USE TO WATCH STREAMING VIDEO ON YOUR TV? (SELECT ALL THAT APPLY)

Posed to all respondents.

Smart TV with built-in streaming operating system
- 51.8%
- 48.3%
- 44.3%
- 47.3%
- 43.3%

Dedicated streaming device / stick / dongle (e.g. Roku Stick, Fire TV Stick, Chromecast, Apple TV)
- 43.6%
- 41.0%
- 43.9%
- 40.5%
- 41.6%

Cable / satellite box (for streaming video services specifically, not just for cable or satellite TV channel viewing)
- 29.6%
- 29.3%
- 28.2%
- 29.2%
- 28.8%

None of the above
- 18.8%
- 20.7%
- 20.8%
- 22.7%
- 23.1%

Legend:
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)

N = 954

WHICH OF THE FOLLOWING DEDICATED STREAMING DEVICES DO YOU USE? (SELECT ALL THAT YOU CURRENTLY USE)

Posed to all respondents who use streaming devices.

Roku Player — 56.7%
Amazon Fire Stick — 43.8%
Google Chromecast — 16.4%
Apple TV — 16.1%
Other (please specify) — 5.5%
TiVo Stream — 1.7%

Legend:
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)
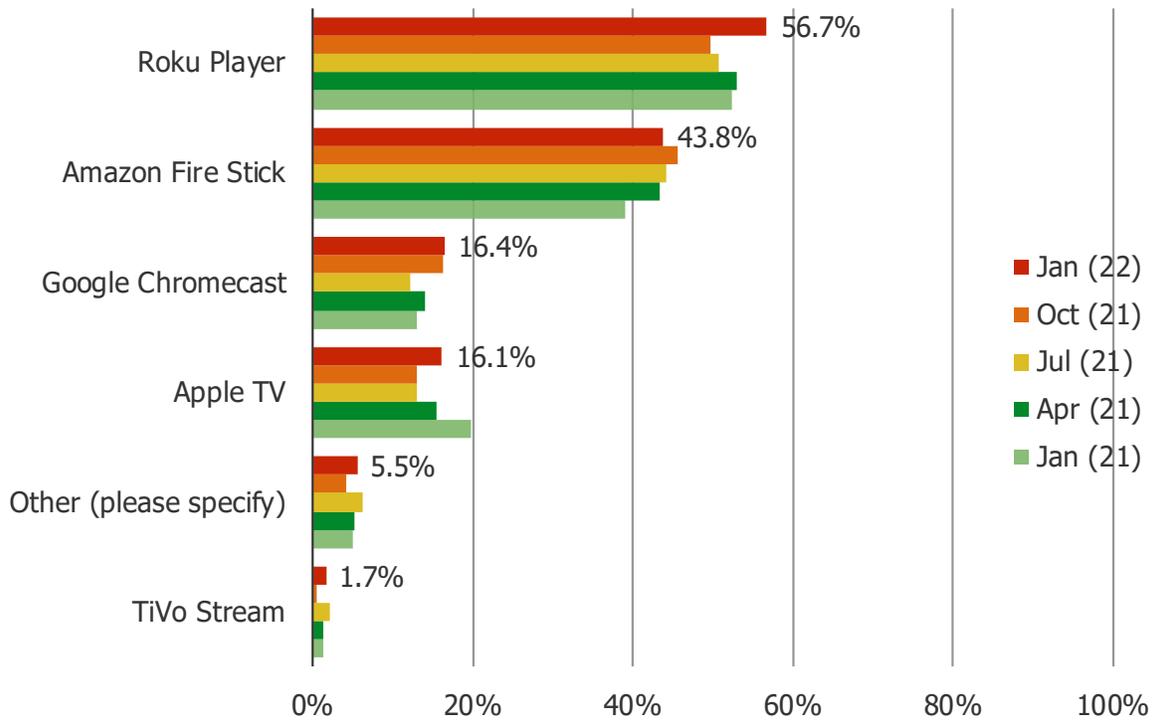
N = 416

WHICH BRAND OF SMART TV DO YOU HAVE? (SELECT ALL THAT APPLY)

Posed to all respondents who own a smart TV.

Legend:
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)

Brand	Jan (22)
Samsung	45.6%
LG	27.3%
Vizio	18.4%
Sony	10.7%
TCL	10.3%
Other	6.3%
Hisense	5.1%
Insignia	4.7%
Sharp	3.4%
Toshiba	2.8%
Panasonic	2.4%
Philips	2.2%
Onn	2.2%
Sanyo	1.4%
Hitachi	1.4%
JVC	0.8%
Huawei	0.6%
RCA	0.6%
AOC	0.6%
InFocus	0.4%
JVC	0.4%
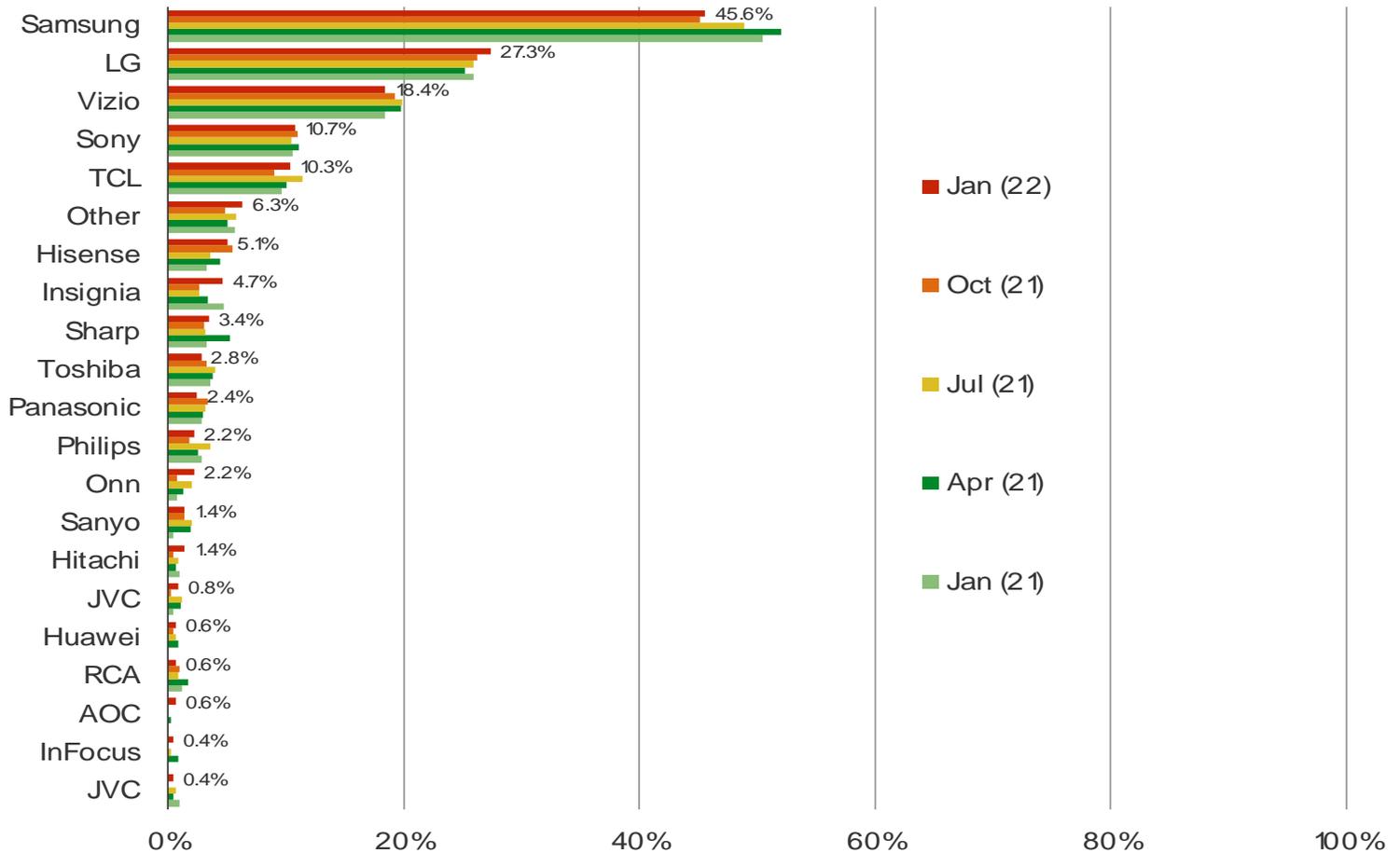
N = 494

## WHICH BUILT-IN OPERATING SYSTEM DOES YOUR SMART TV RUN? (SELECT ALL THAT APPLY ACROSS ALL THE TVS YOU OWN)

Posed to all respondents who own a smart TV.

Legend:
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)

Chart (Jan '22 values labeled):
- Other / I don't know: 41.7%
- Roku TV: 29.0%
- Amazon Fire TV: 16.2%
- Vizio Smartcast: 11.1%
- LG webOS: 10.9%
- Android TV: 10.1%
- Tizen OS: 2.0%
- Firefox OS: 1.6%
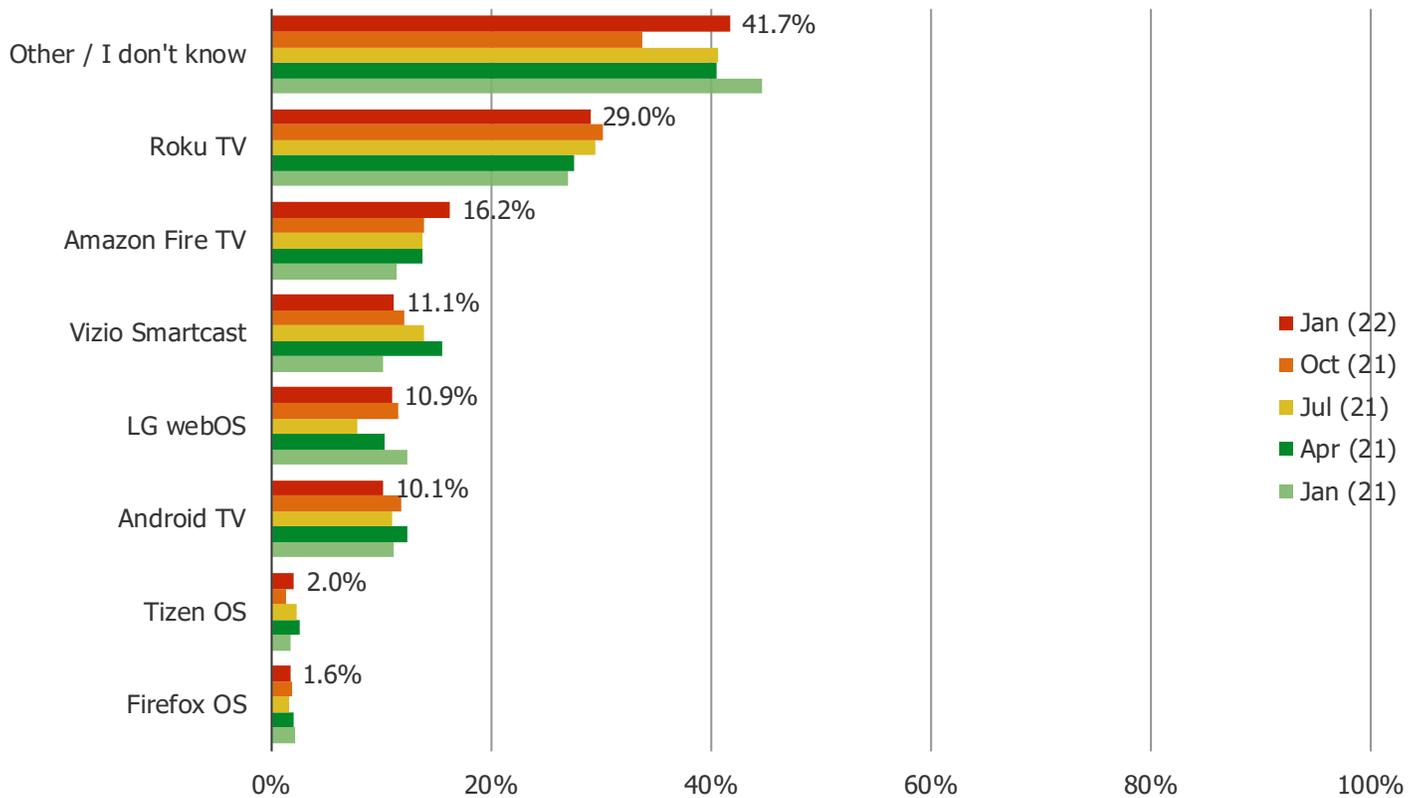
N = 494

WHAT TYPE OF CABLE/SATELLITE SET TOP BOX DO YOU USE TO WATCH STREAMING VIDEO? (SELECT ALL THAT APPLY)
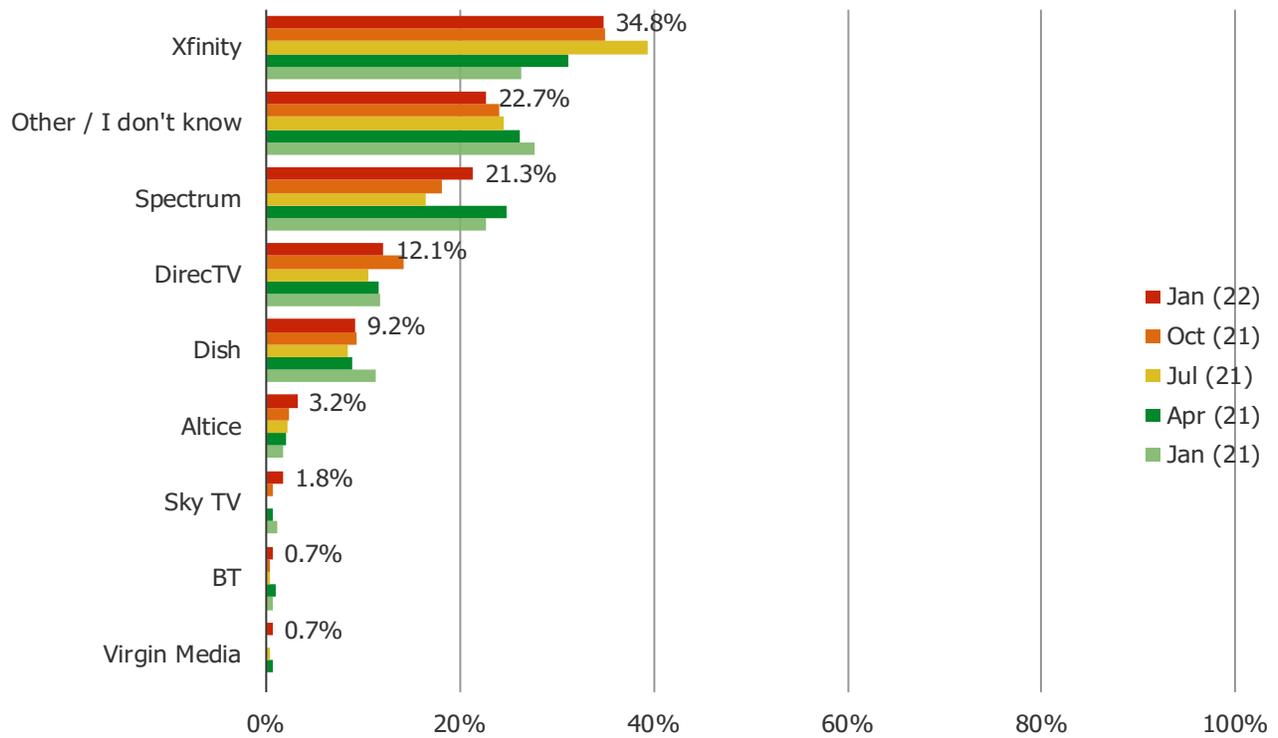
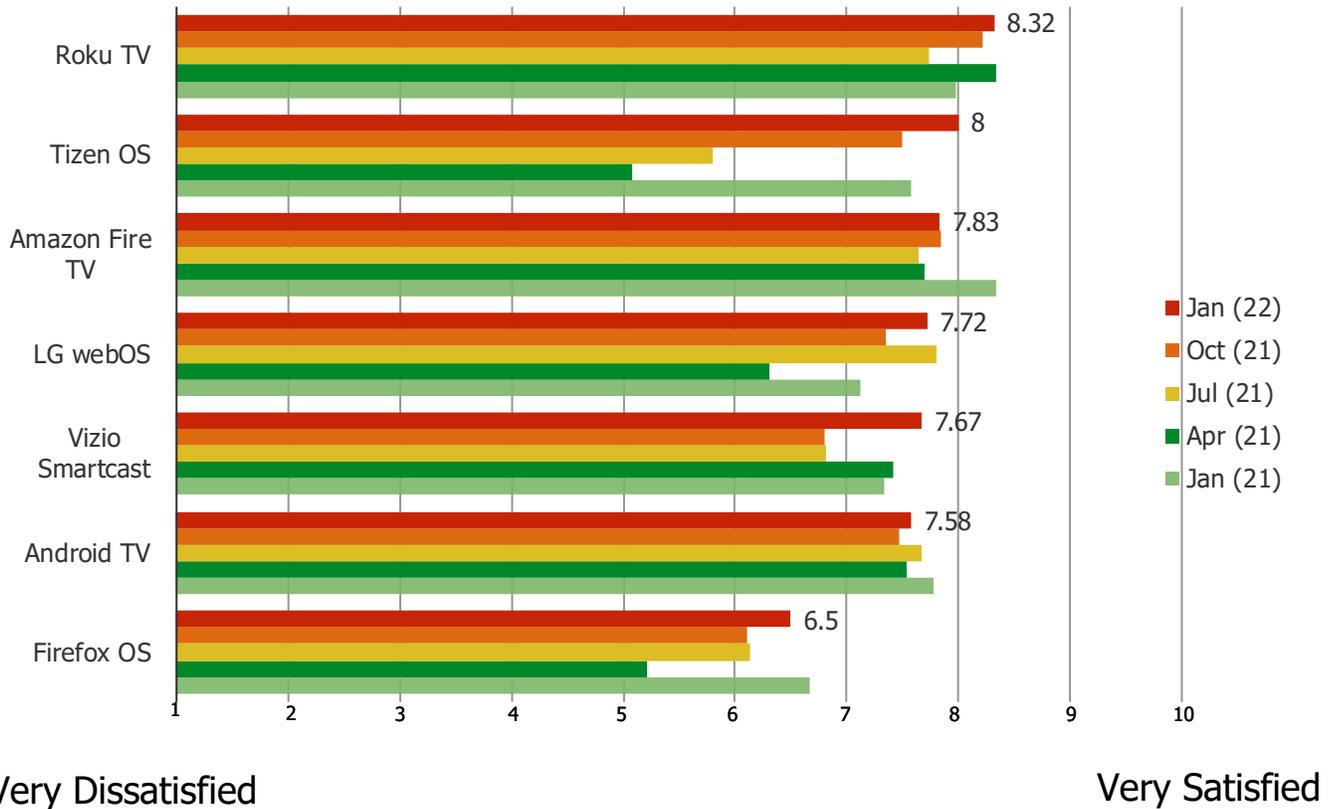Posed to all respondents who use streaming devices.

N = 282

Streaming Video Players

ON A SCALE FROM 1-10, HOW SATISFIED ARE YOU WITH THE SOFTWARE INTERFACE ON YOUR SMART TV?

Posed to all respondents who own a smart TV and use each of the following.

Very Dissatisfied

Very Satisfied

Legend:
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)

	N=
Roku TV	143
Android TV	50
Amazon Fire TV	80
Tizen OS	10
Vizio Smartcast	55
Firefox OS	8
LG webOS	54

ON A SCALE OF 1-10 (10 BEING EASIEST, 1 BEING DIFFICULT) HOW EASY OR DIFFICULT IS IT TO OPERATE THE SOFTWARE INTERFACE ON YOUR SMART TV?

Posed to all respondents who own a smart TV and use each of the following.

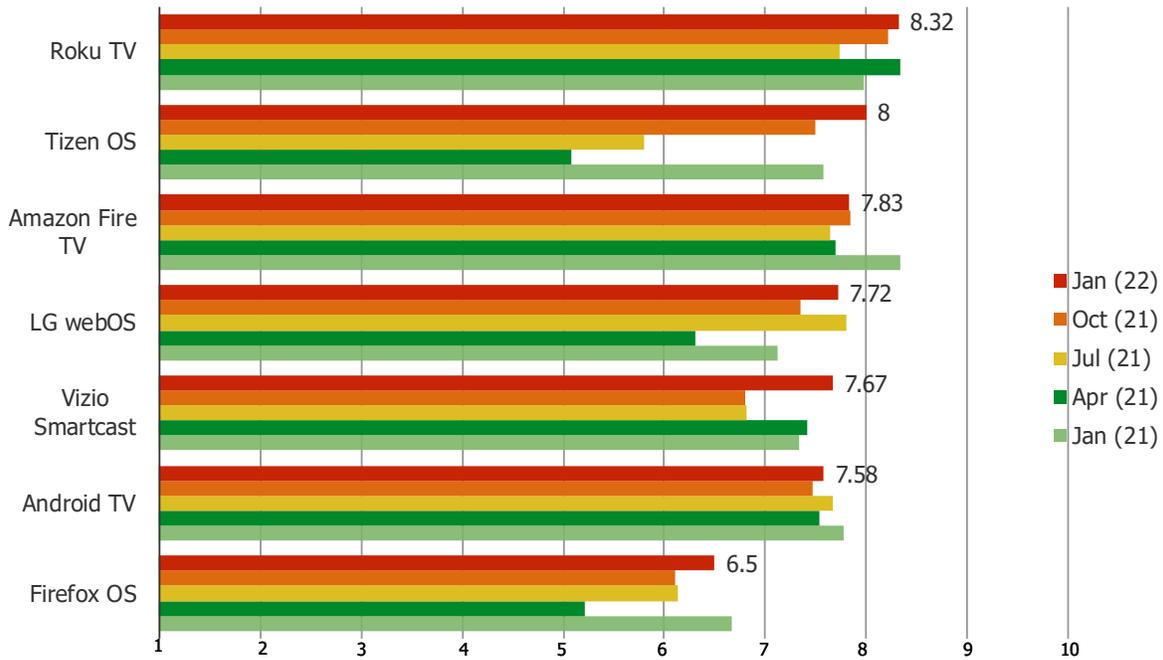|	N=
Roku TV	143
Android TV	50
Amazon Fire TV	80
Tizen OS	10
Vizio Smartcast	55
Firefox OS	8
LG webOS	54

ON A SCALE FROM 1-10, HOW SATISFIED ARE YOU WITH THE SOFTWARE INTERFACE ON YOUR STREAMING DEVICE?

Posed to all respondents who use streaming devices.

Device	Jan (22)
Roku TV	8.32
Tizen OS	8
Amazon Fire TV	7.83
LG webOS	7.72
Vizio Smartcast	7.67
Android TV	7.58
Firefox OS	6.5

Legend: Jan (22), Oct (21), Jul (21), Apr (21), Jan (21)

Very Dissatisfied

Very Satisfied

	N =
Roku Player	221
Amazon Fire Stick	206
Google Chromecast	77
Apple TV	56

ON A SCALE FROM 1-10 (10 BEING EASIEST, 1 BEING DIFFICULT) HOW EASY OR DIFFICULT IS IT TO OPERATE THE SOFTWARE INTERFACE ON YOUR STREAMING DEVICE?

Posed to all respondents who use streaming devices.

Legend:
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)

Amazon Fire Stick: 8.31 (Jan 22)
Roku Player: 8.26 (Jan 22)
Google Chromecast: 7.97 (Jan 22)
Apple TV: 7.87 (Jan 22)

Very Difficult   Very Easy
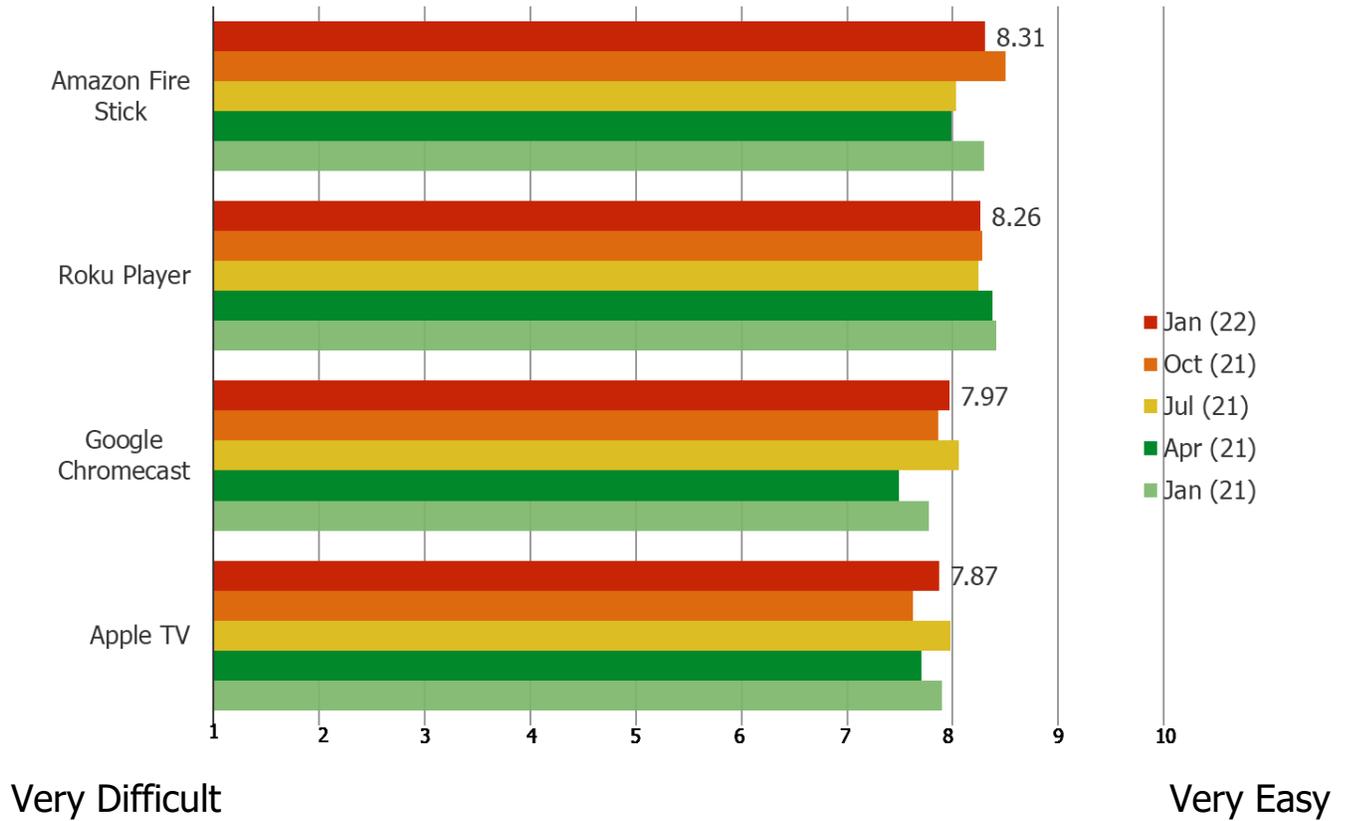
e	N =
Roku Player	221
Amazon Fire Stick	206
Google Chromecast	77
Apple TV	56

ARE YOU PLANNING ON PURCHASING A NEW SMART TV IN THE NEXT 12-18 MONTHS?

Posed to all respondents.

Yes, I am planning on purchasing a new smart TV in the next 12-18 months
- Jan (22): 21.8%
- Oct (21): 22.4%
- Jul (21): 16.2%
- Apr (21): 22.4%
- Jan (21): 16.7%

No, I am not
- Jan (22): 78.2%
- Oct (21): 77.6%
- Jul (21): 83.8%
- Apr (21): 77.6%
- Jan (21): 83.3%
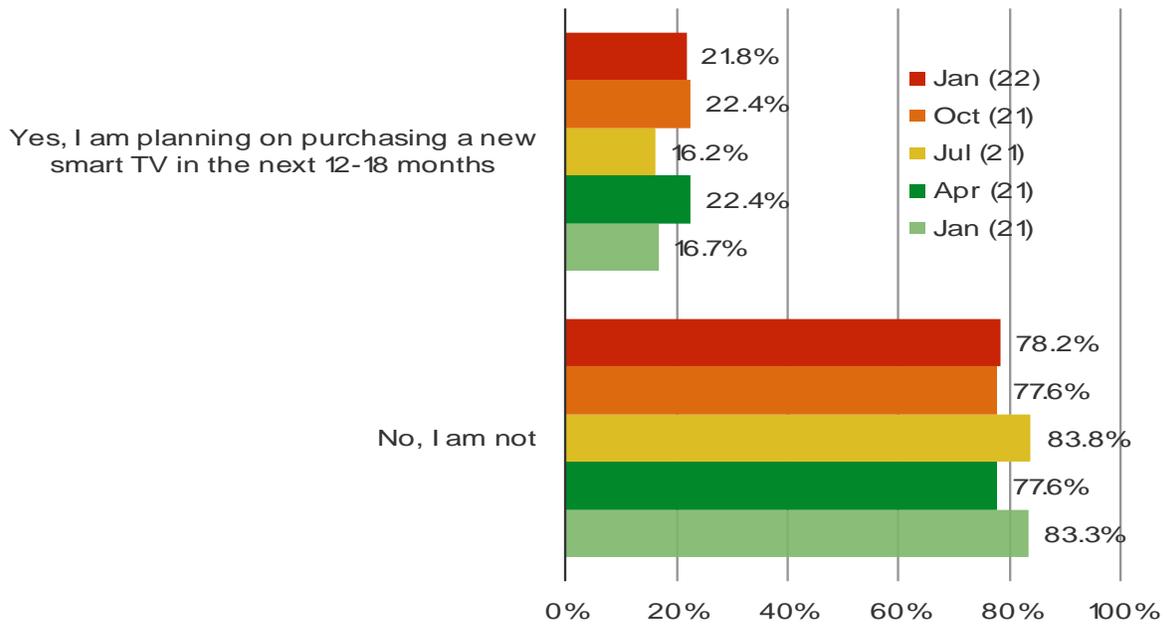
N = 954

WHAT IS THE PRIMARY FACTOR THAT WILL DETERMINE WHICH TV YOU BUY?

Posed to all respondents who have plans to purchase a smart TV in the next 12-18 months.

Decide based on the price point
- 38.9% — Jan (22)
- 31.6% — Oct (21)
- 33.5% — Jul (21)
- 35.8% — Apr (21)
- 31.1% — Jan (21)

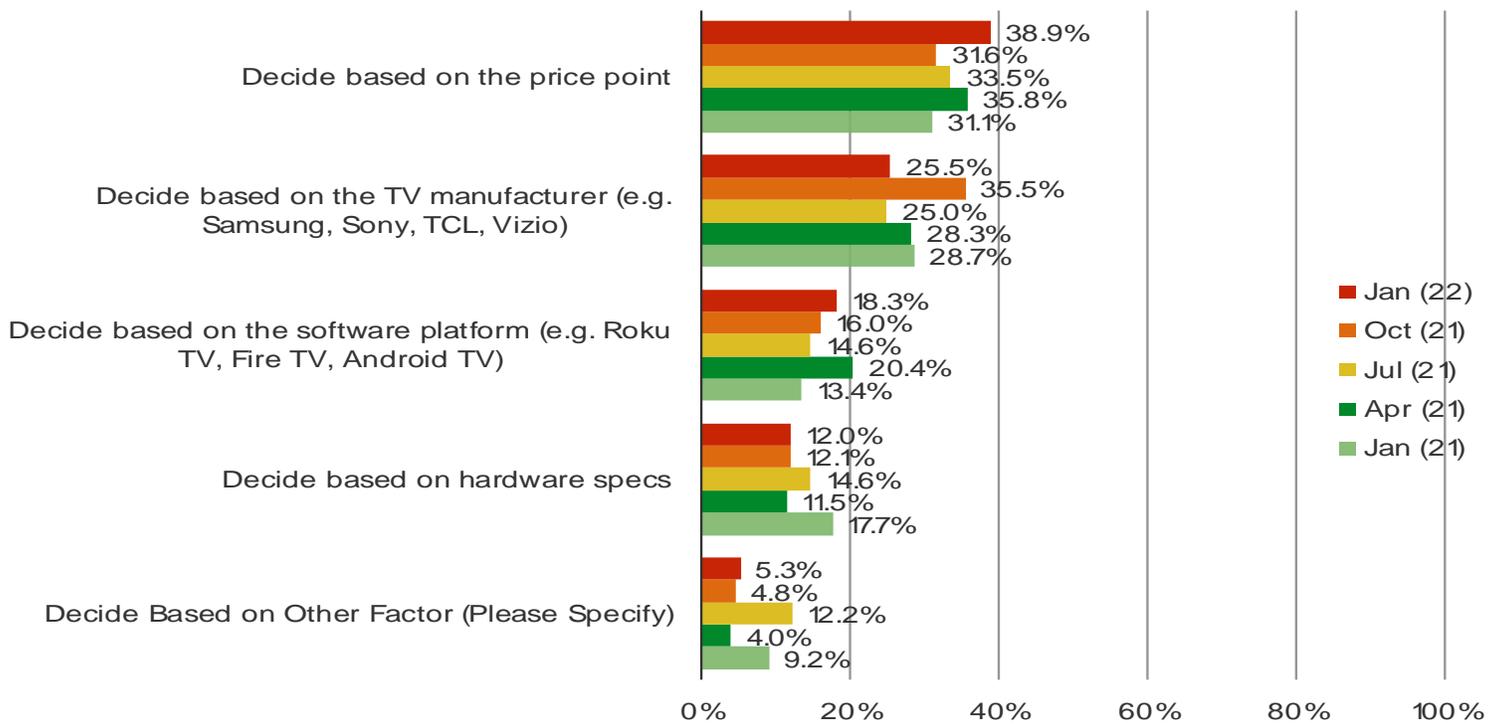**Decide based on the TV manufacturer (e.g. Samsung, Sony, TCL, Vizio)**
- 25.5% — Jan (22)
- 35.5% — Oct (21)
- 25.0% — Jul (21)
- 28.3% — Apr (21)
- 28.7% — Jan (21)

Decide based on the software platform (e.g. Roku TV, Fire TV, Android TV)
- 18.3% — Jan (22)
- 16.0% — Oct (21)
- 14.6% — Jul (21)
- 20.4% — Apr (21)
- 13.4% — Jan (21)

Decide based on hardware specs
- 12.0% — Jan (22)
- 12.1% — Oct (21)
- 14.6% — Jul (21)
- 11.5% — Apr (21)
- 17.7% — Jan (21)

Decide Based on Other Factor (Please Specify)
- 5.3% — Jan (22)
- 4.8% — Oct (21)
- 12.2% — Jul (21)
- 4.0% — Apr (21)
- 9.2% — Jan (21)

Legend:
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)

N = 208

WHICH SOFTWARE PLATFORM ARE YOU PLANNING TO GET?

Posed to all respondents who have plans to purchase a smart TV.

Not sure yet
- 47.1%
- 50.2%
- 52.4%
- 47.4%
- 63.4%

Roku TV
- 22.1%
- 15.6%
- 20.1%
- 20.8%
- 10.4%

Amazon Fire TV
- 9.6%
- 11.7%
- 8.5%
- 10.2%
- 9.2%

Android TV
- 9.6%
- 11.7%
- 9.2%
- 7.1%
- 6.1%

Vizio Smartcast
- 6.7%
- 5.6%
- 3.7%
- 5.8%
- 4.9%

LG webOS
- 3.4%
- 2.2%
- 3.7%
- 3.5%
- 2.4%

Tizen OS
- 1.4%
- 2.2%
- 1.8%
- 1.8%
- 3.1%

Firefox OS
- 0.0%
- 0.9%
- 0.6%
- 3.5%
- 0.6%

Legend:
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)
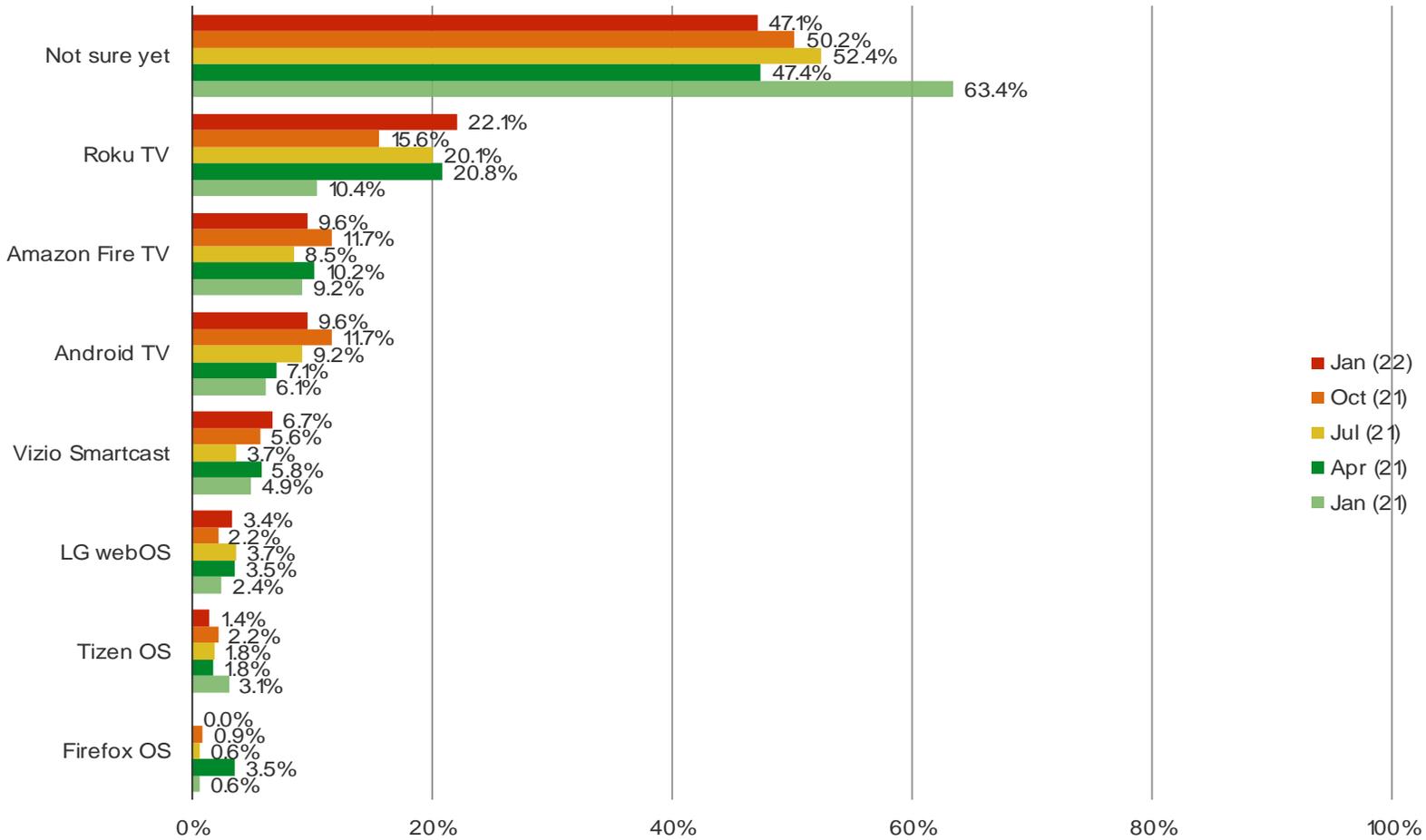
N = 208

IF YOU HAD TO PICK ONE OF THE FOLLOWING SMART TV SOFTWARE PLATFORMS, WHICH WOULD YOU CHOOSE?

Posed to all respondents who either currently use a smart TV and/or have plans to purchase a smart TV in the next 12-18 months.

Chart legend: Jan (22), Oct (21), Jul (21), Apr (21), Jan (21)

- I don't know / Not applicable: 38.5%
- Roku TV: 19.9%
- Amazon Fire TV: 13.3%
- Samsung Tizen OS: 8.6%
- Android TV: 7.9%
- Vizio Smartcast OS: 5.4%
- LG webOS: 5.1%
- Firefox OS: 1.4%
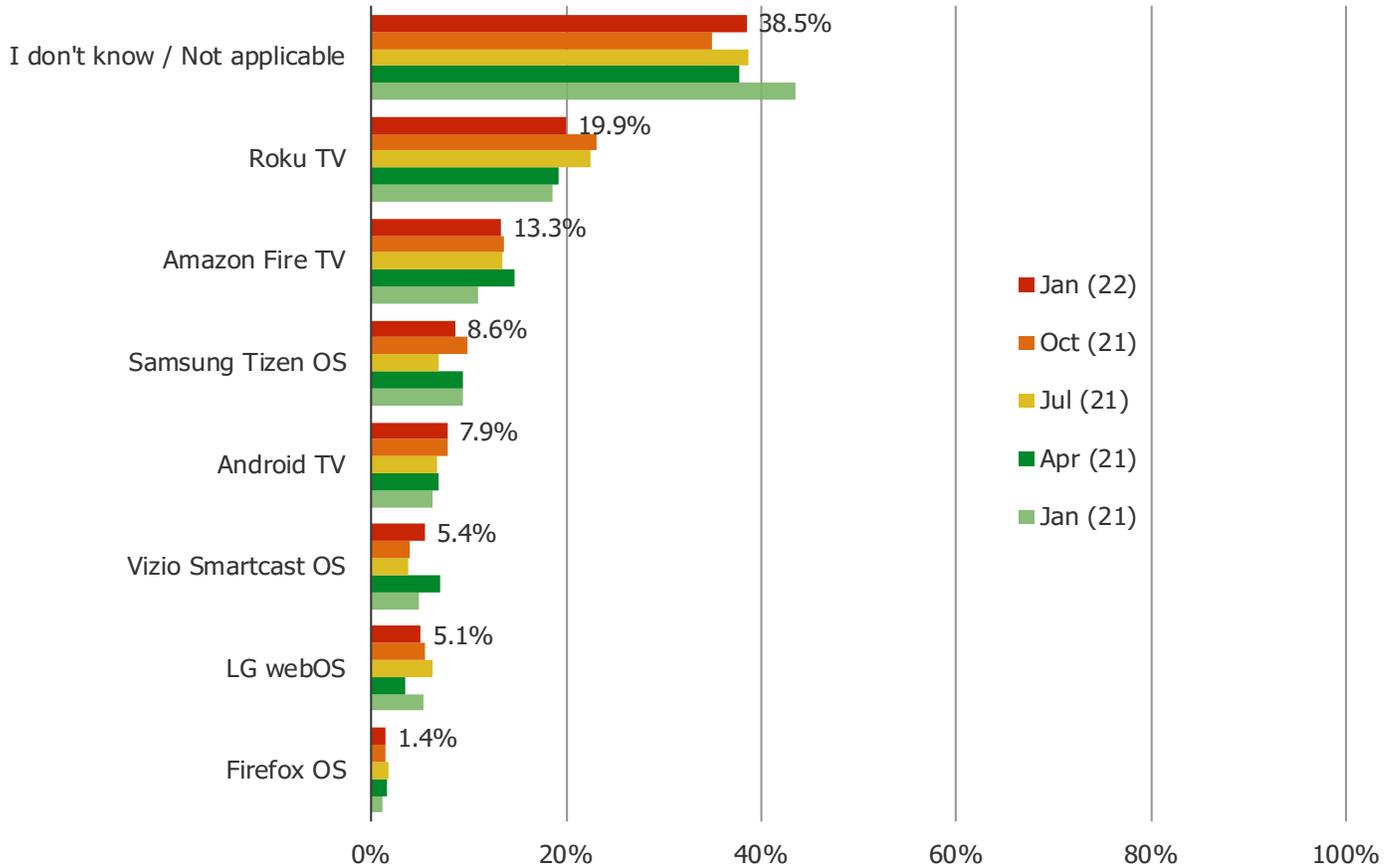
N = 572

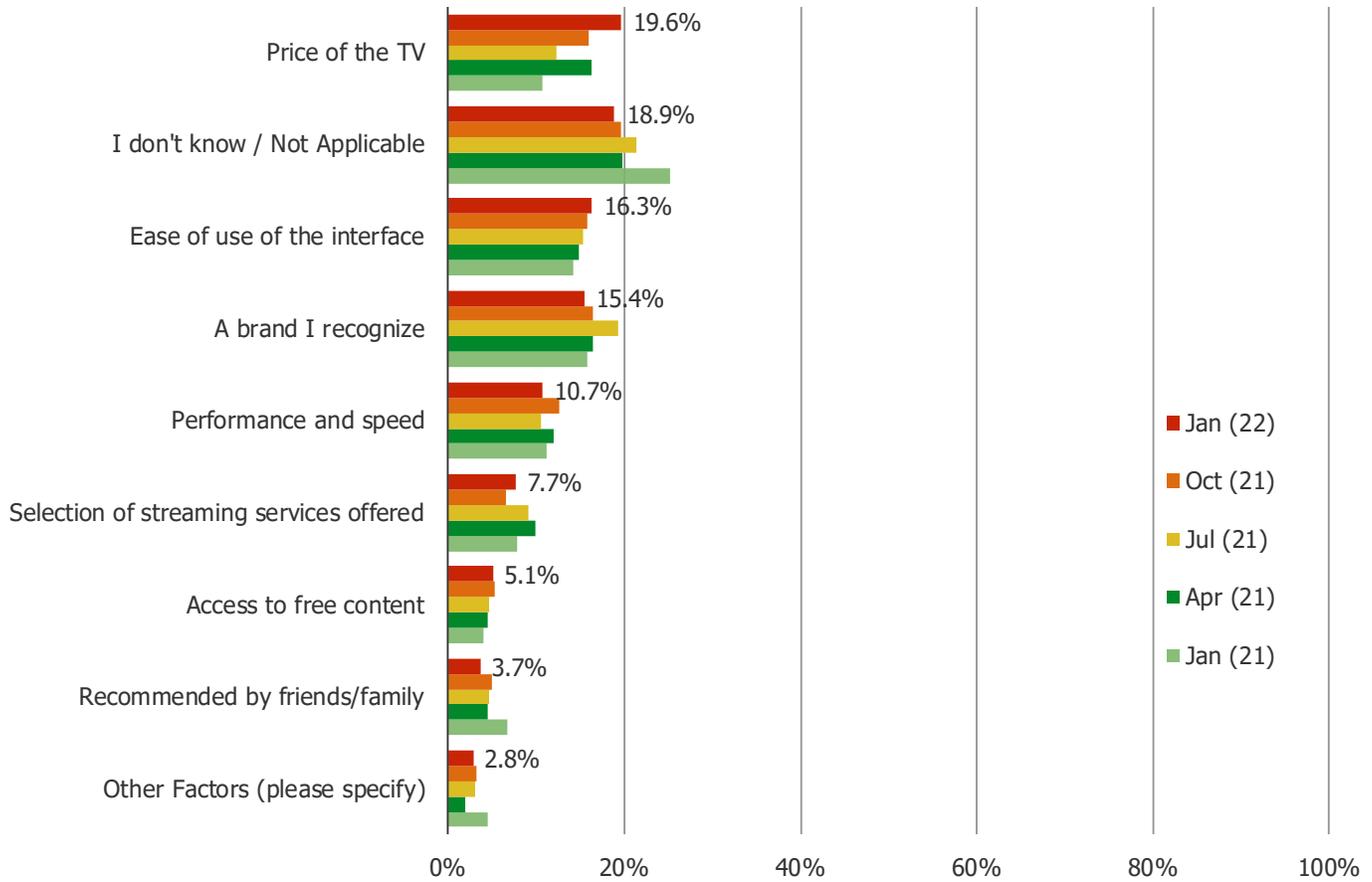THINKING ABOUT THE QUESTION ABOVE (CHART ON PRIOR PAGE), WHICH OF THE FOLLOWING FACTORS MOST DETERMINED YOUR PREFERENCE?

Posed to all respondents who either currently use a smart TV and/or have plans to purchase a smart TV in the next 12-18 months.

Price of the TV — 19.6%
I don't know / Not Applicable — 18.9%
Ease of use of the interface — 16.3%
A brand I recognize — 15.4%
Performance and speed — 10.7%
Selection of streaming services offered — 7.7%
Access to free content — 5.1%
Recommended by friends/family — 3.7%
Other Factors (please specify) — 2.8%

Legend:
■ Jan (22)
■ Oct (21)
■ Jul (21)
■ Apr (21)
■ Jan (21)

N = 572