

# Bespoke Survey Research

July 2023

## Streaming Players Survey (Roku Deep Dive)

Volume 11 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: ROKU, AMZN, AAPL.

### KPIs and Key questions

1. Customers have a favorable opinion of the Roku channel.
2. A cohort of consumers are interested in a TV manufactured by Roku, especially those who are already a user of Roku OS (via a smart TV or a streaming player).
3. Among those who own a TCL TV, the share of customers who bought it because it has Roku on it has increased over time (now a third of buyers).
4. An increasing percentage of consumers who stream video are doing so via a Smart TV with a built-in streaming operating system.
5. Sentiment remains strongest for Roku out of all operating systems / streaming devices tested (engagement, sentiment, NPS, etc).
6. As is the case with many of our surveys, pricing is growing more important as the top catalyst driving TV brand purchase decisions.
7. Younger consumers want to see their favorite cable news personalities come directly to them via streaming or social media (as opposed to cable TV).

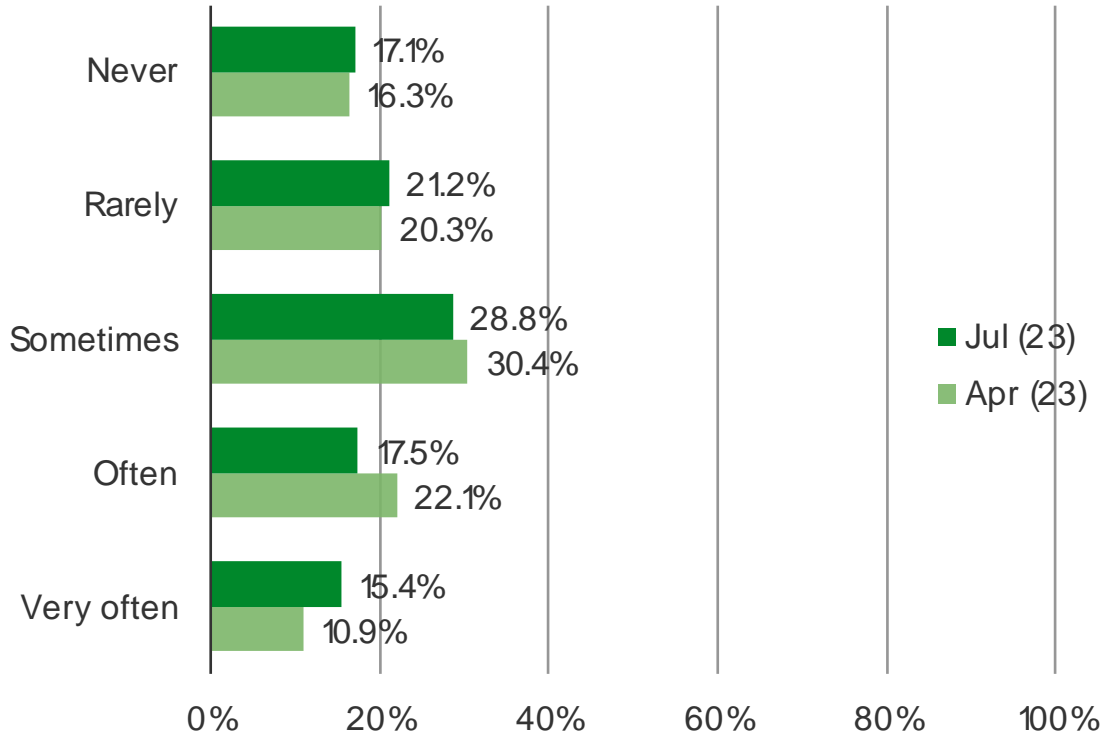
### Noteworthy Stats:

- 15.4%** Of respondents who have a TV that uses the Roku OS or own a Roku streaming player watch the Roku channel very often.
- 38.2%** Of respondents use a dedicated streaming device to watch streaming video.
- 21.6%** Of respondents who are Roku streaming player users are extremely interested in a Roku made TV.
- 32.9%** Of TCL owners said they bought a TCL TV primarily because it had Roku TV on it.
- 17.3%** Of those who plan to buy a Smart TV in the next 12-18 months said they will decide primarily based on the software on the TV.

# NEW QUESTIONS THIS QUARTER

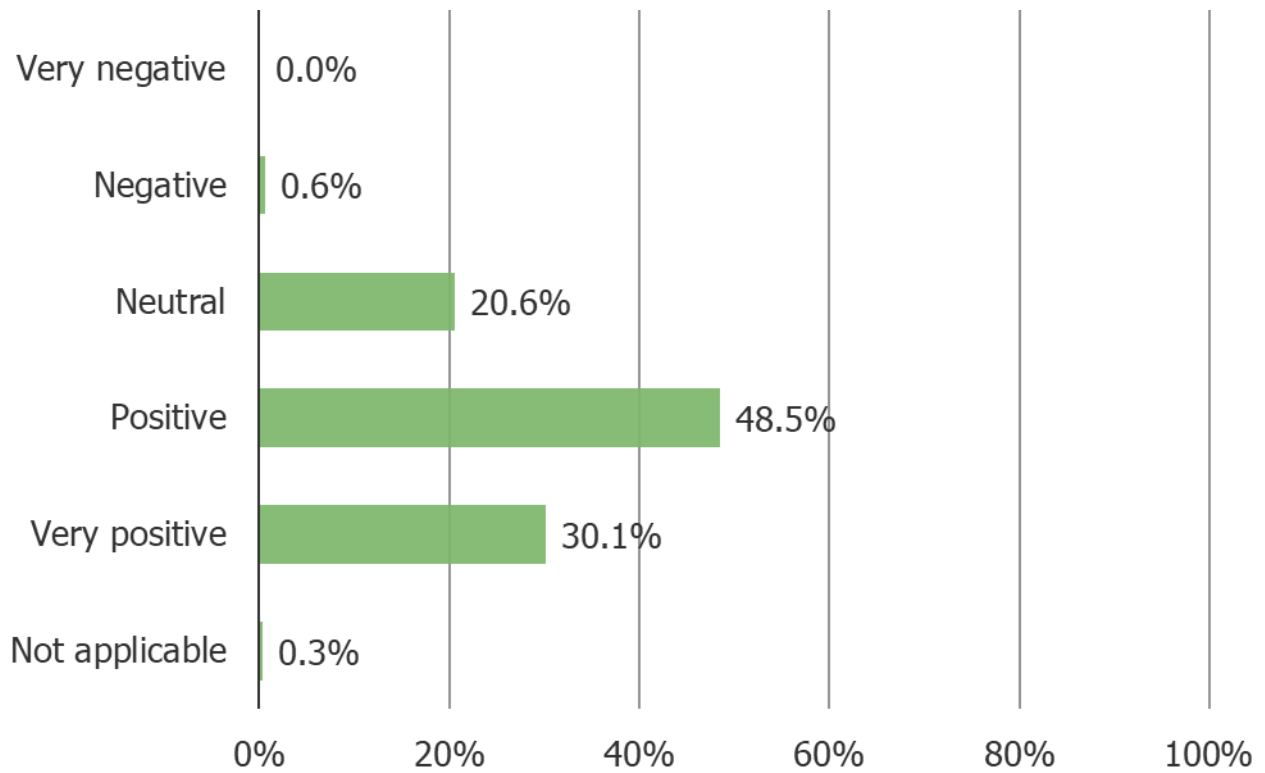
HOW OFTEN DO YOU WATCH THE ROKU CHANNEL?

Posed to respondents who have a TV that uses the Roku OS or owns a Roku streaming player (N = 292).



WHAT IS YOUR OPINION OF THE ROKU CHANNEL?

Posed to Roku users who watch the Roku Channel sometimes, often, or very often (N = 355).

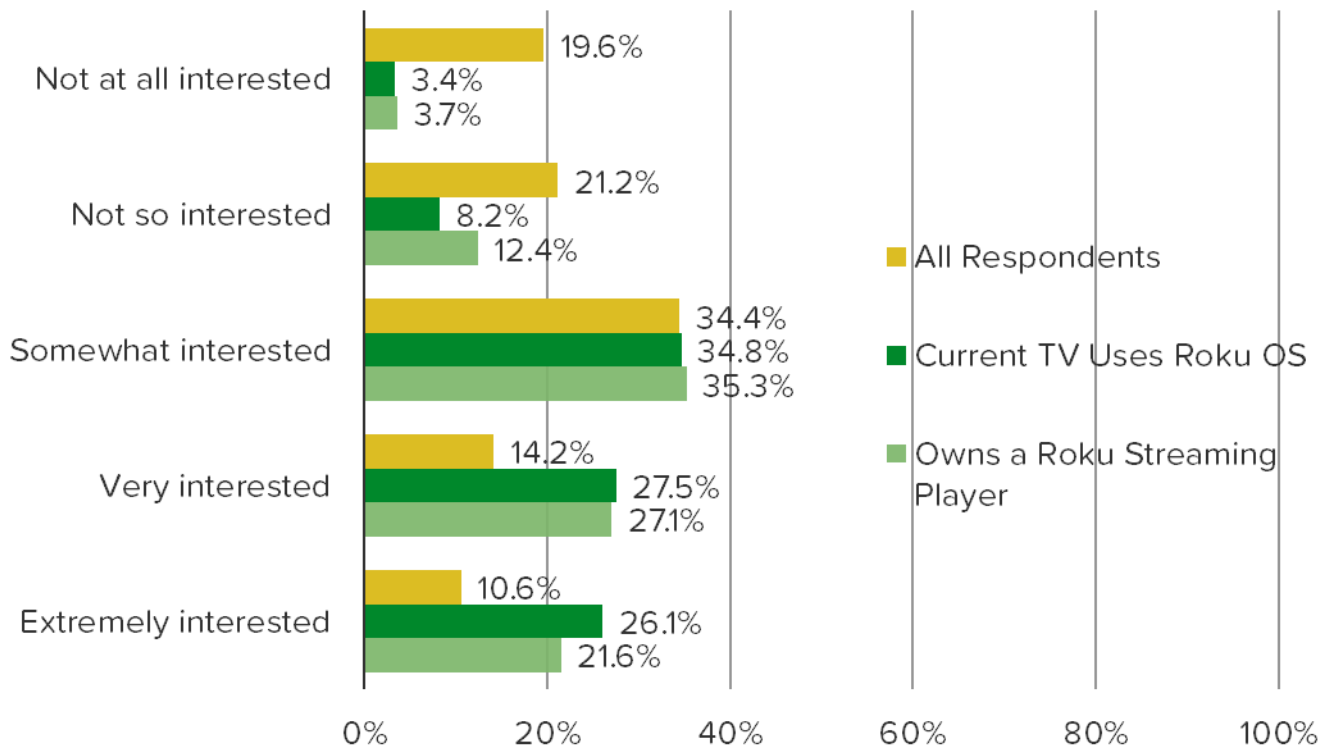


Combining July and April 2023 data to achieve a larger N size.

HOW INTERESTED WOULD YOU BE IN GETTING A TV THAT WAS ACTUALLY MANUFACTURED BY ROKU?

Posed to all respondents.

JULY 2023

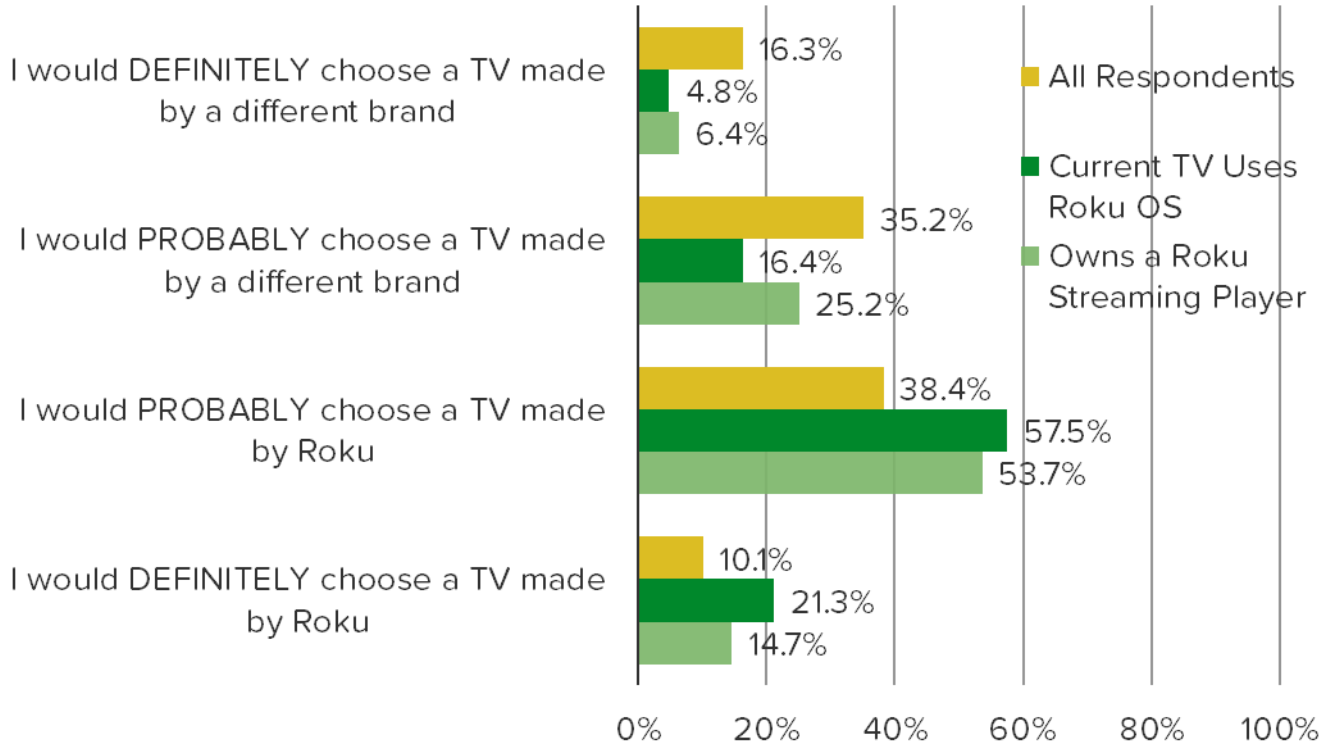


	N=
Owns a Roku Streaming Player	218
Current TV Uses Roku OS	207
All Respondents	988

HOW LIKELY WOULD YOU BE TO BUY A TV THAT WAS MANUFACTURED BY ROKU WHEN YOU ARE BUYING YOUR NEXT TV?

Posed to all respondents, cross-tabbed.

JULY 2023

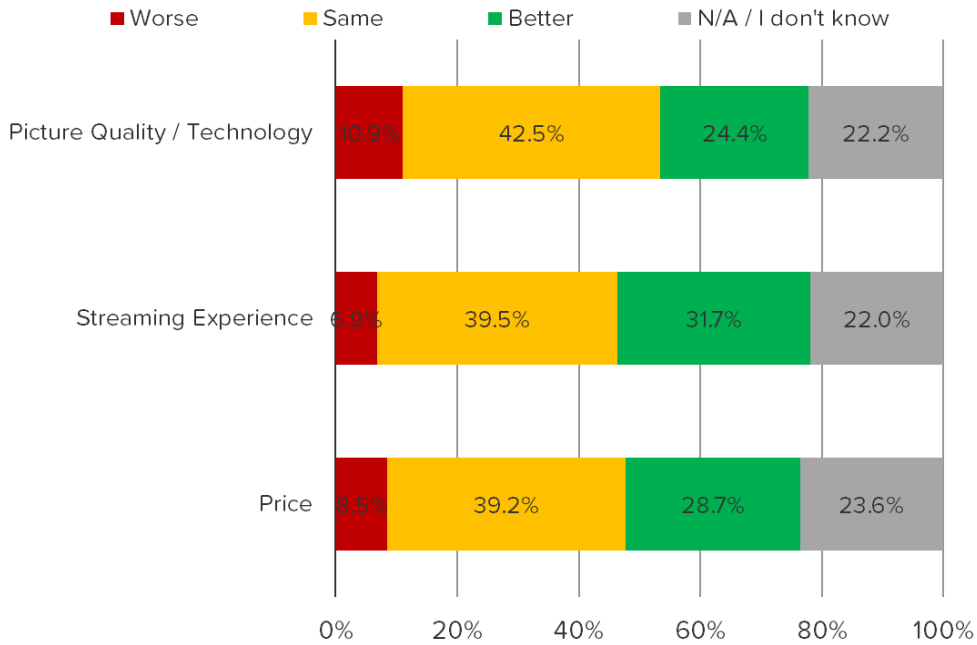


	N=
Owns a Roku Streaming Player	218
Current TV Uses Roku OS	207
All Respondents	988

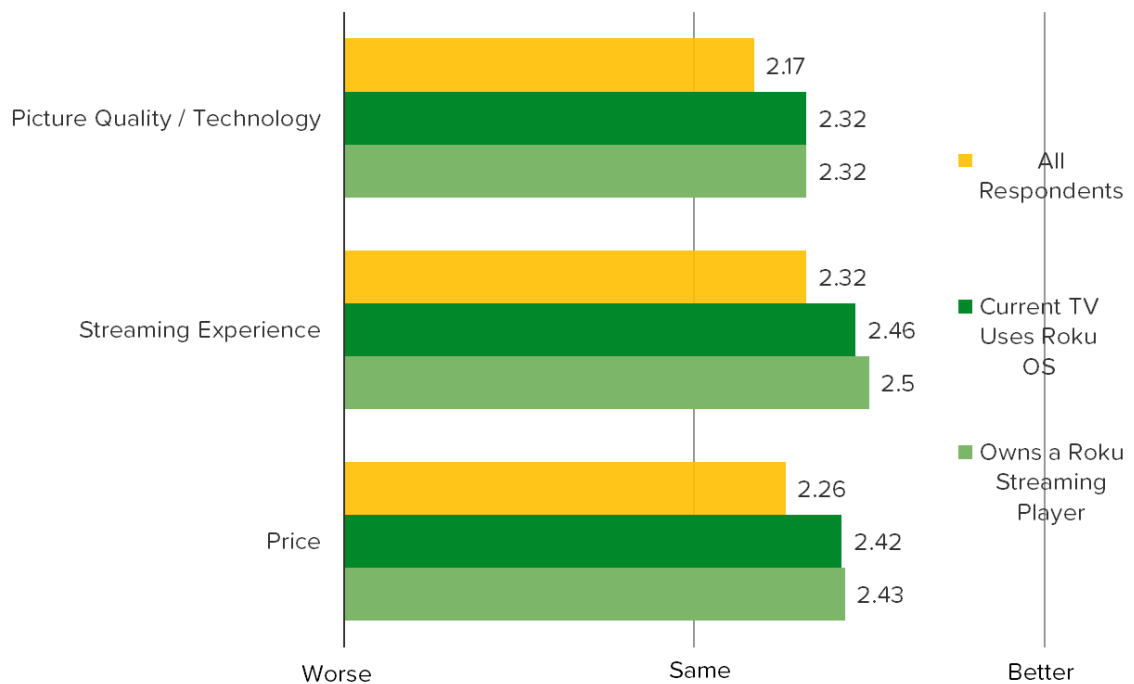
WOULD YOU EXPECT A TV MANUFACTURED BY ROKU TO BE BETTER OR WORSE THAN WHAT YOU HAVE NOW WHEN IT COMES TO...

Posed to all respondents.

JULY 2023



Cross-Tab Analysis

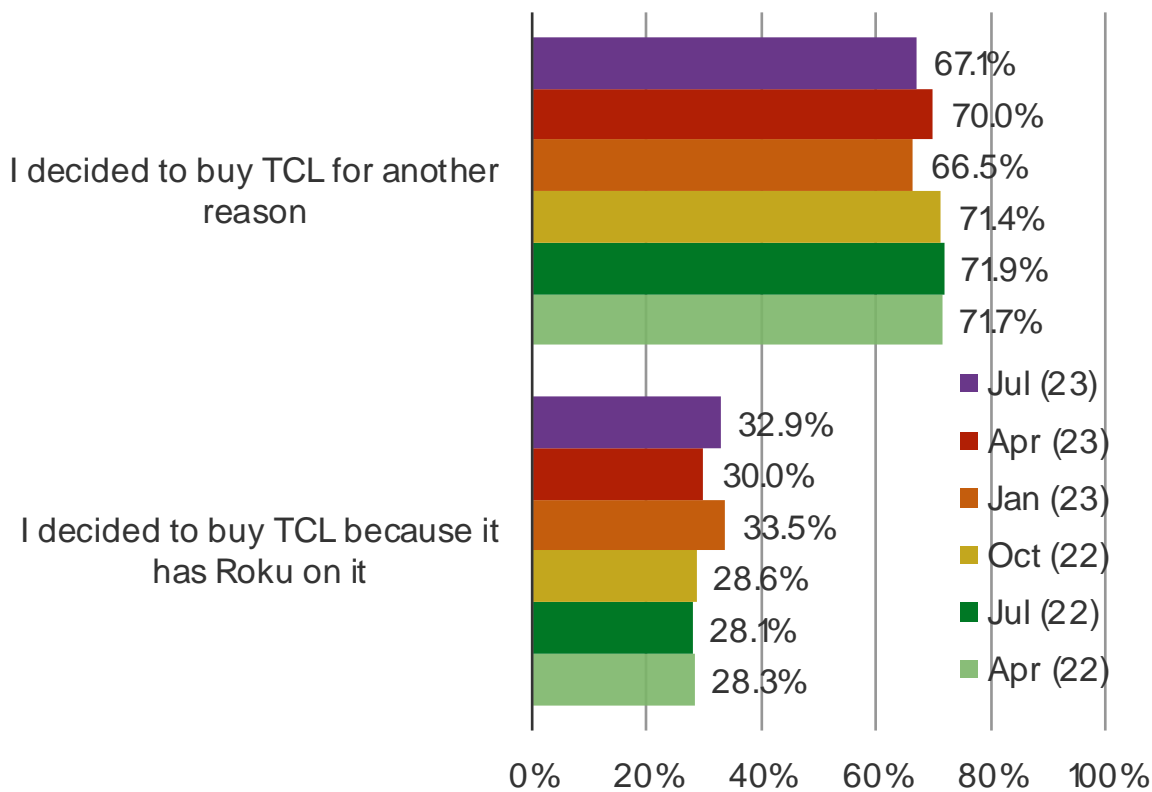


# ROKU SURVEY CHARTS



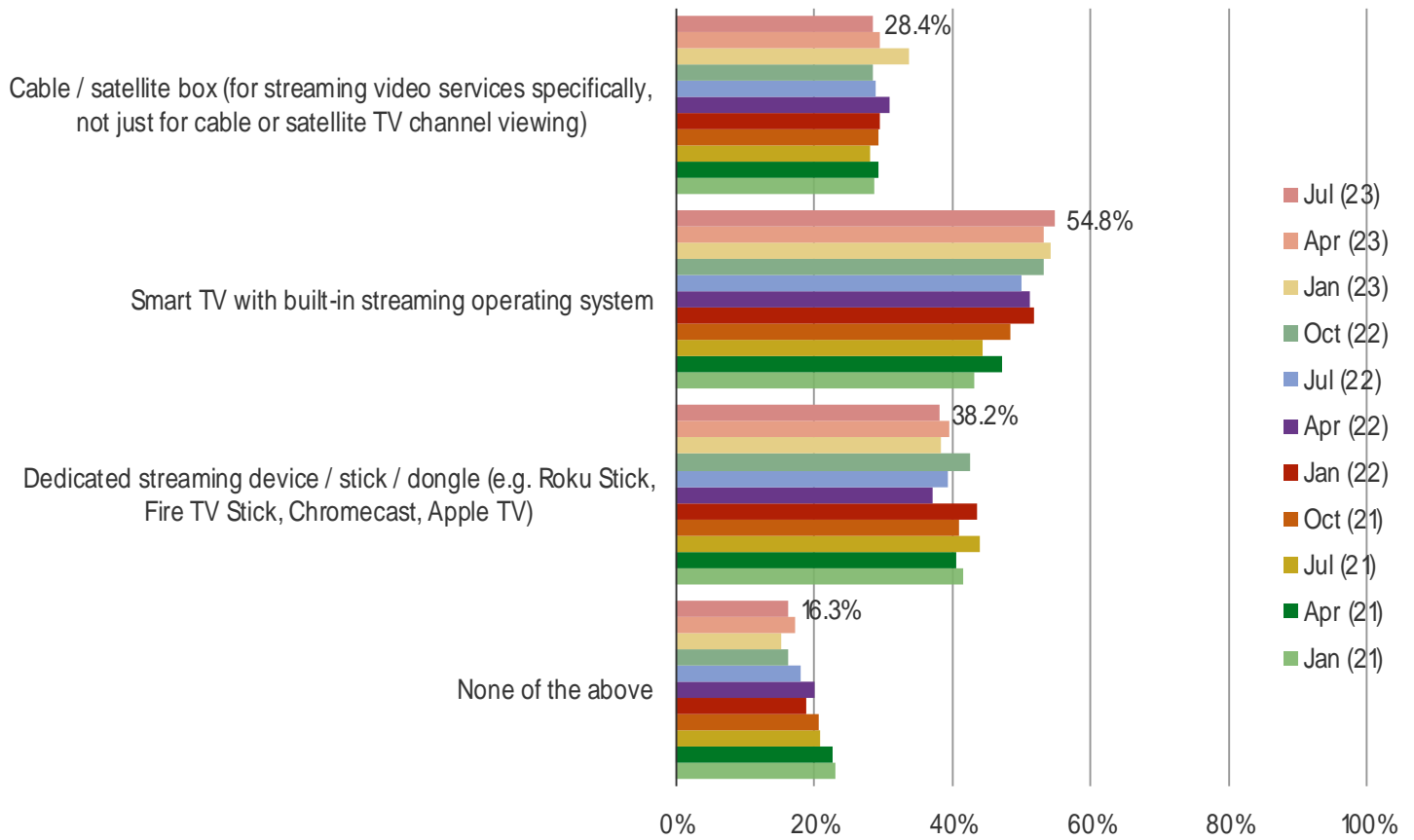
THINKING ABOUT YOUR TCL TV, WHICH OF THE FOLLOWING DESCRIBES YOU...

Posed to all respondents who have a TCL TV.



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

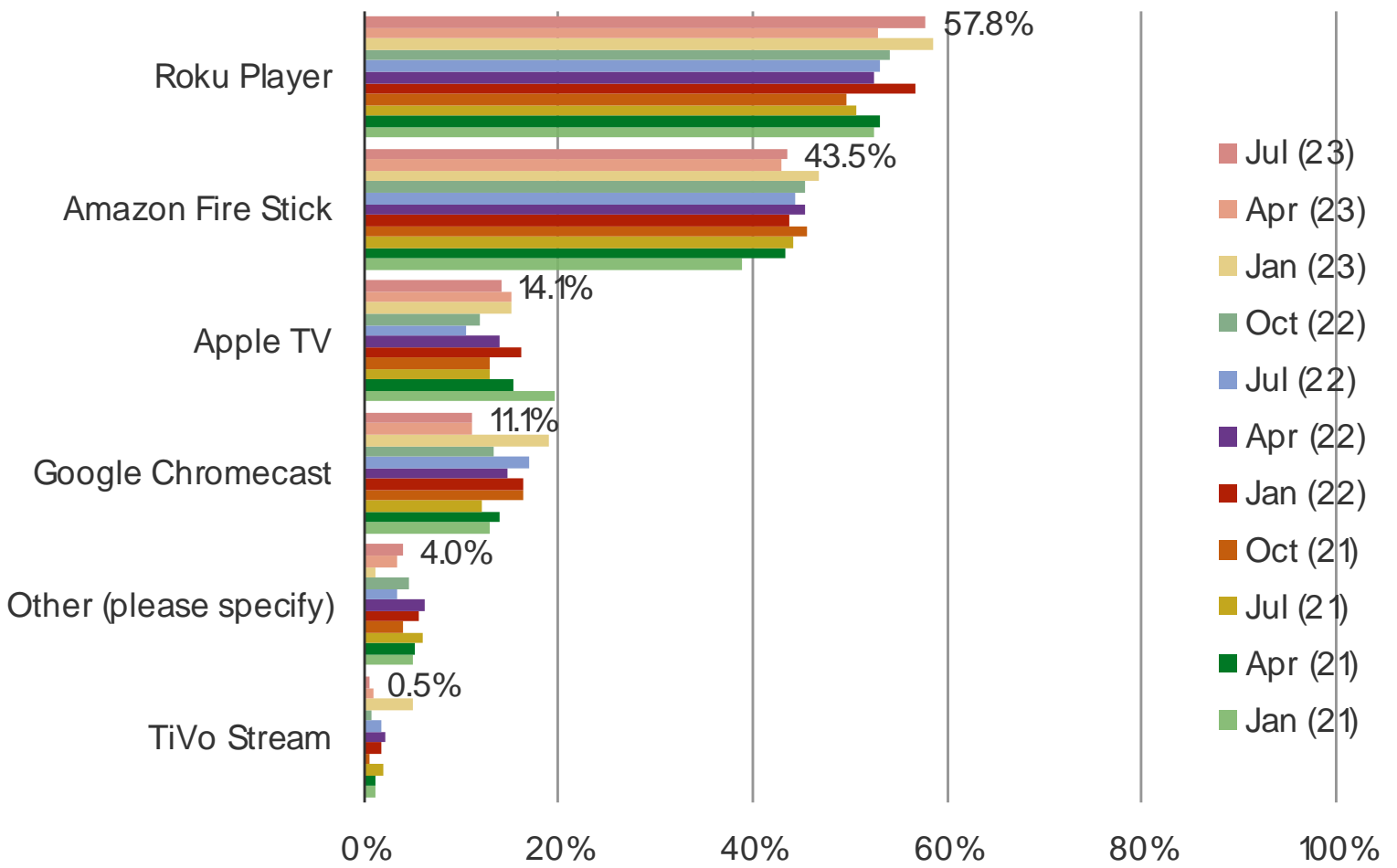
Posed to all respondents.



N = 988

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

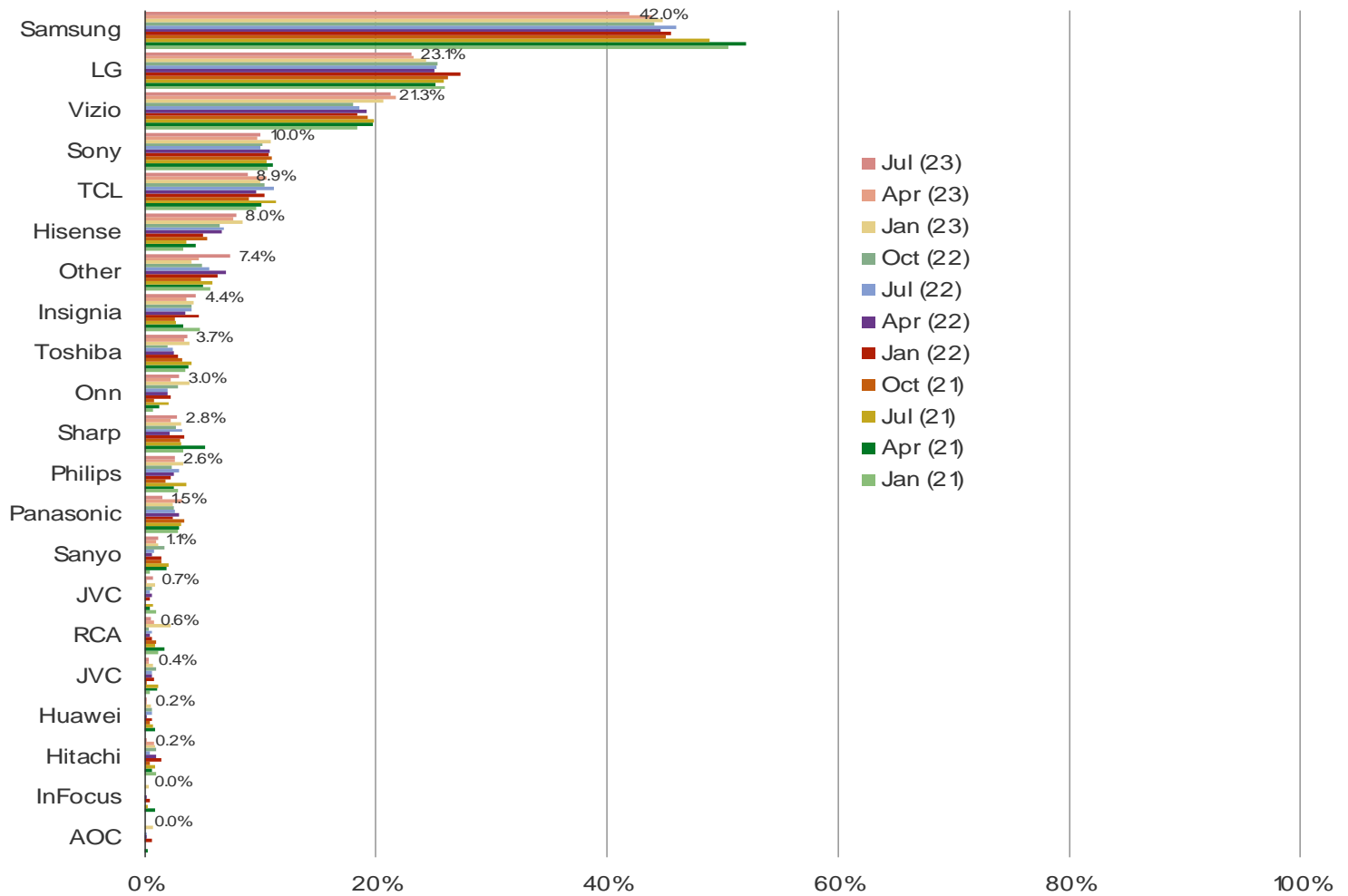
Posed to all respondents who use streaming devices.



N = 377

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

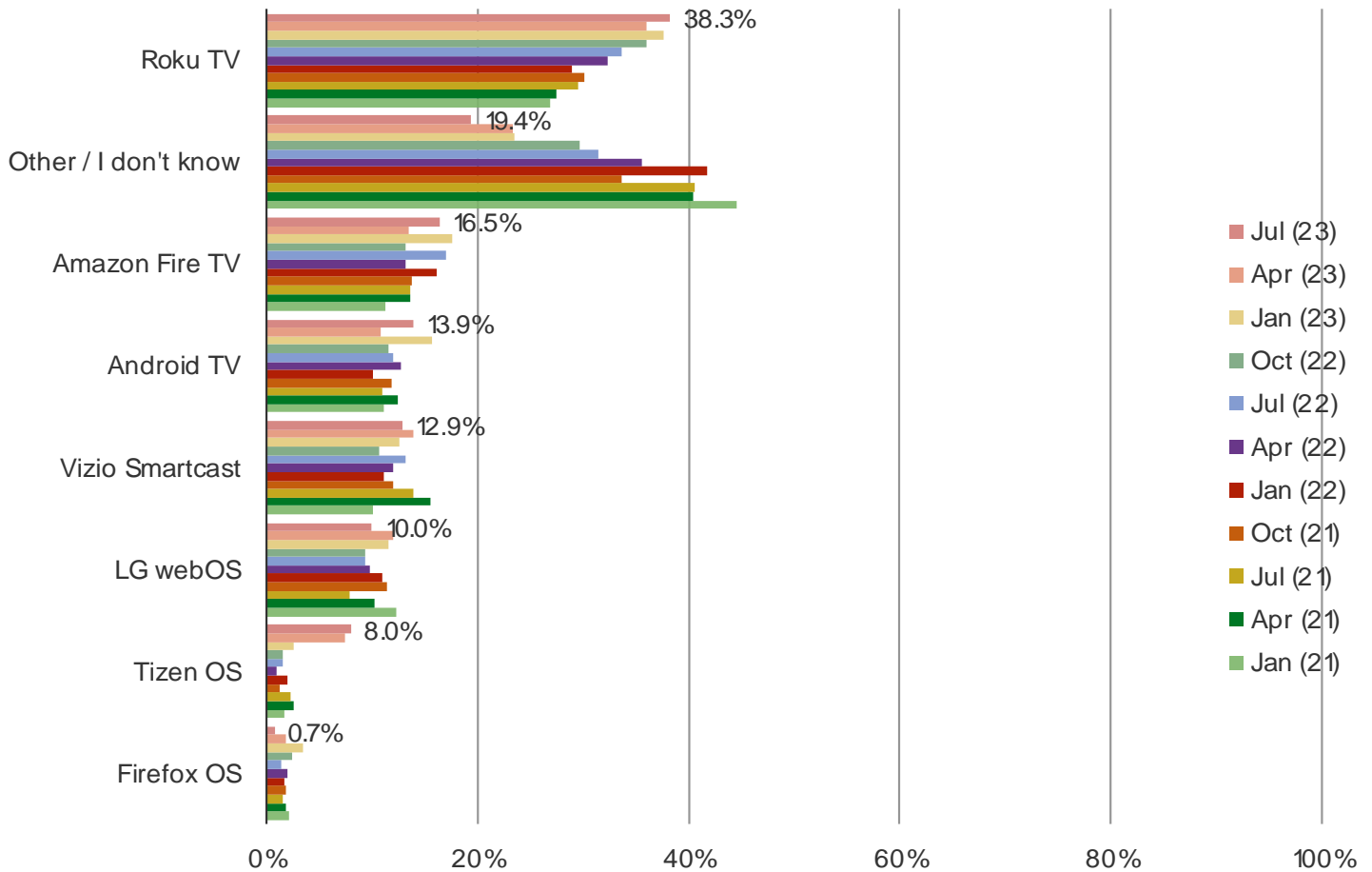
Posed to all respondents who own a smart TV.



N = 541

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

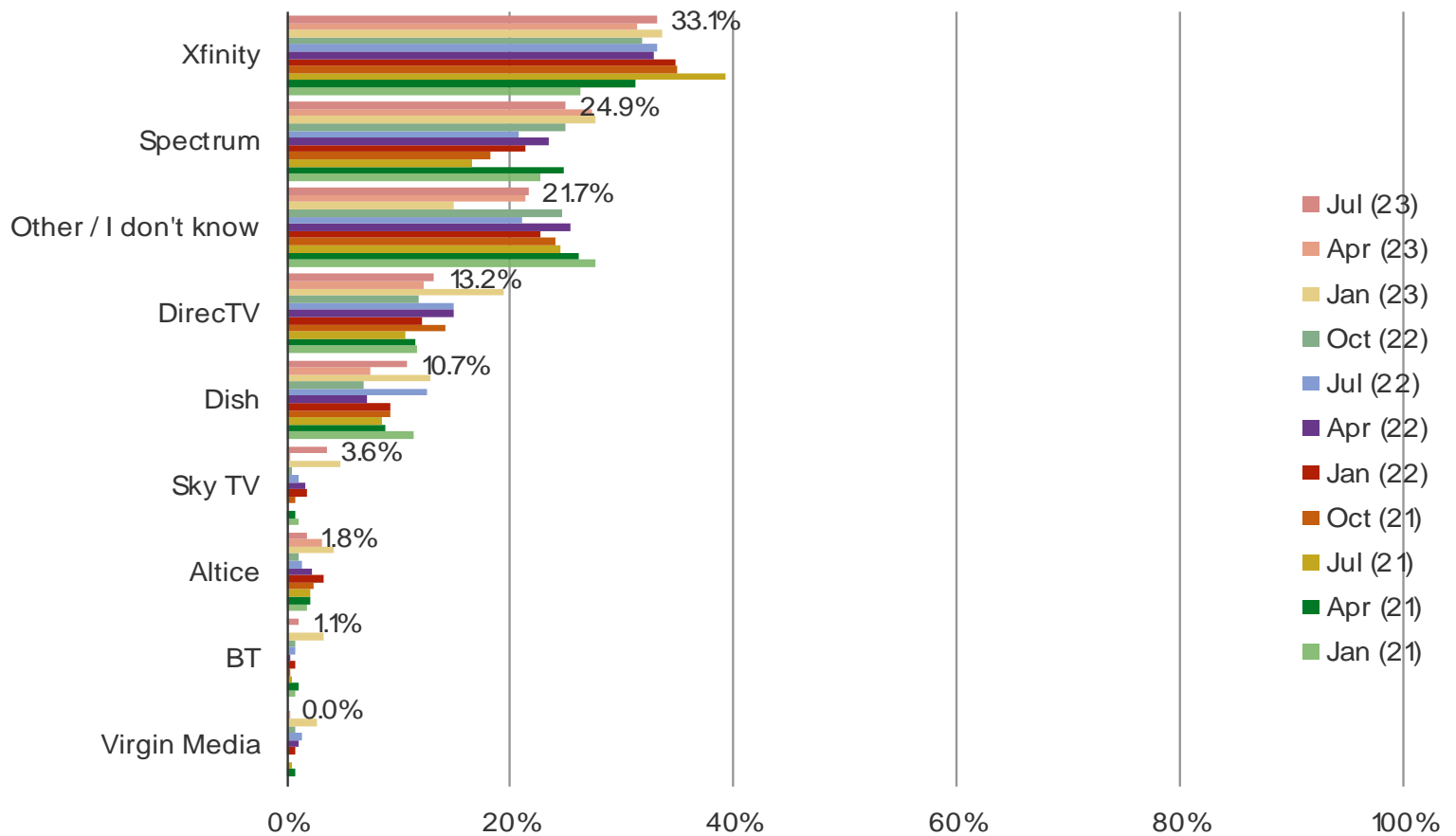
Posed to all respondents who own a smart TV.



N = 541

WHAT TYPE OF CABLE/SATELLITE SET TOP BOX DO YOU USE TO WATCH STREAMING VIDEO? (SELECT ALL THAT APPLY)

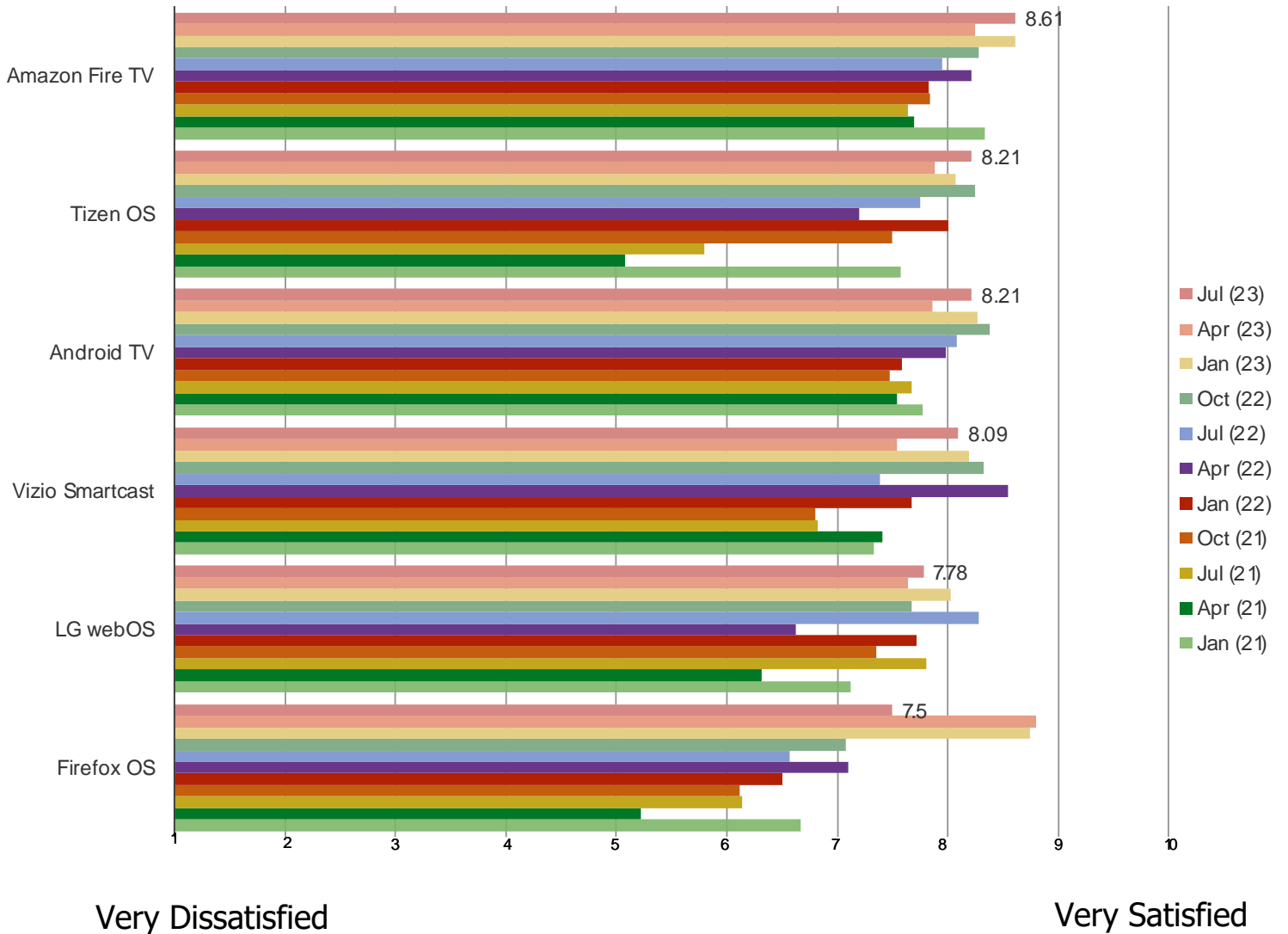
Posed to all respondents who use streaming devices.



N = 281

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

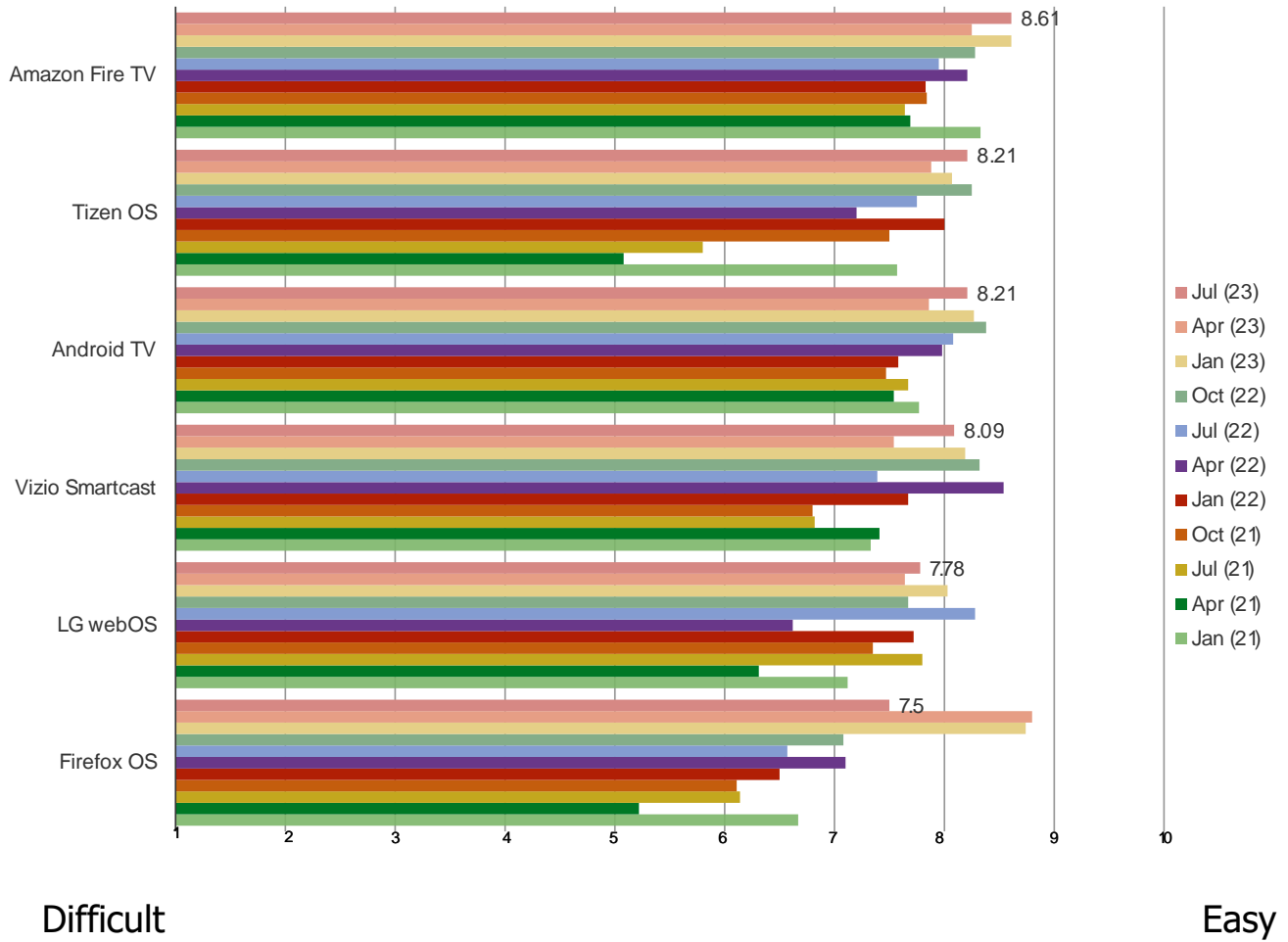
Posed to all respondents who own a smart TV and use each of the following.



	N=
Roku TV	207
Google TV or Android TV	75
Amazon Fire TV	89
Tizen OS (Samsung)	43
Vizio Smartcast	70
Firefox OS	4
LG webOS	54

ON A SCALE FROM 1-10, 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.

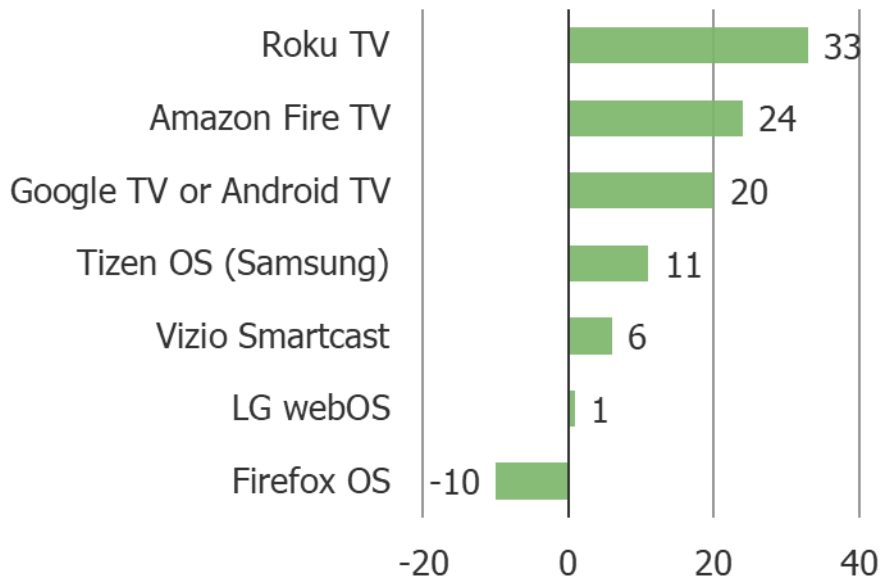


	N=
Roku TV	207
Google TV or Android TV	75
Amazon Fire TV	89
Tizen OS (Samsung)	43
Vizio Smartcast	70
Firefox OS	4
LG webOS	54



NPS SCORE | HOW LIKELY ARE YOU TO RECOMMEND THE OPERATING SYSTEM OF THE SMART TV YOU CURRENTLY USE TO A FRIEND OR COLLEAGUE?

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

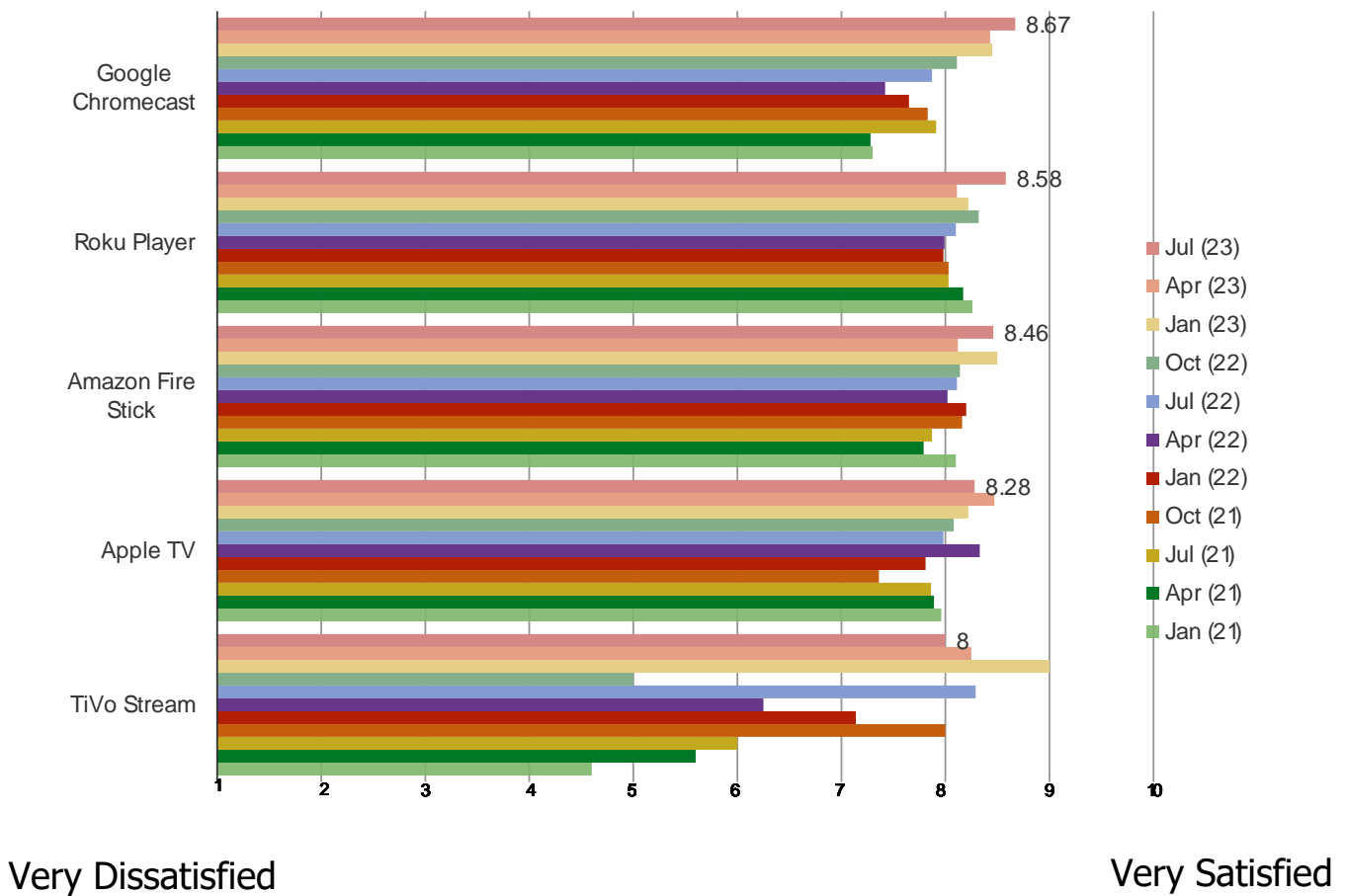


	N =
Roku TV	2136
Amazon Fire TV	948
Vizio Smartcast	810
Google TV or Android TV	801
LG webOS	684
Tizen OS (Samsung)	183
Firefox OS	132

Combining all prior waves to achieve larger N sizes.

ON A SCALE OF 1-10 (10 BEING EASIEST, 1 BEING DIFFICULT) HOW SATISFIED ARE YOU WITH THE SOFTWARE INTERFACE ON YOUR STREAMING DEVICE?

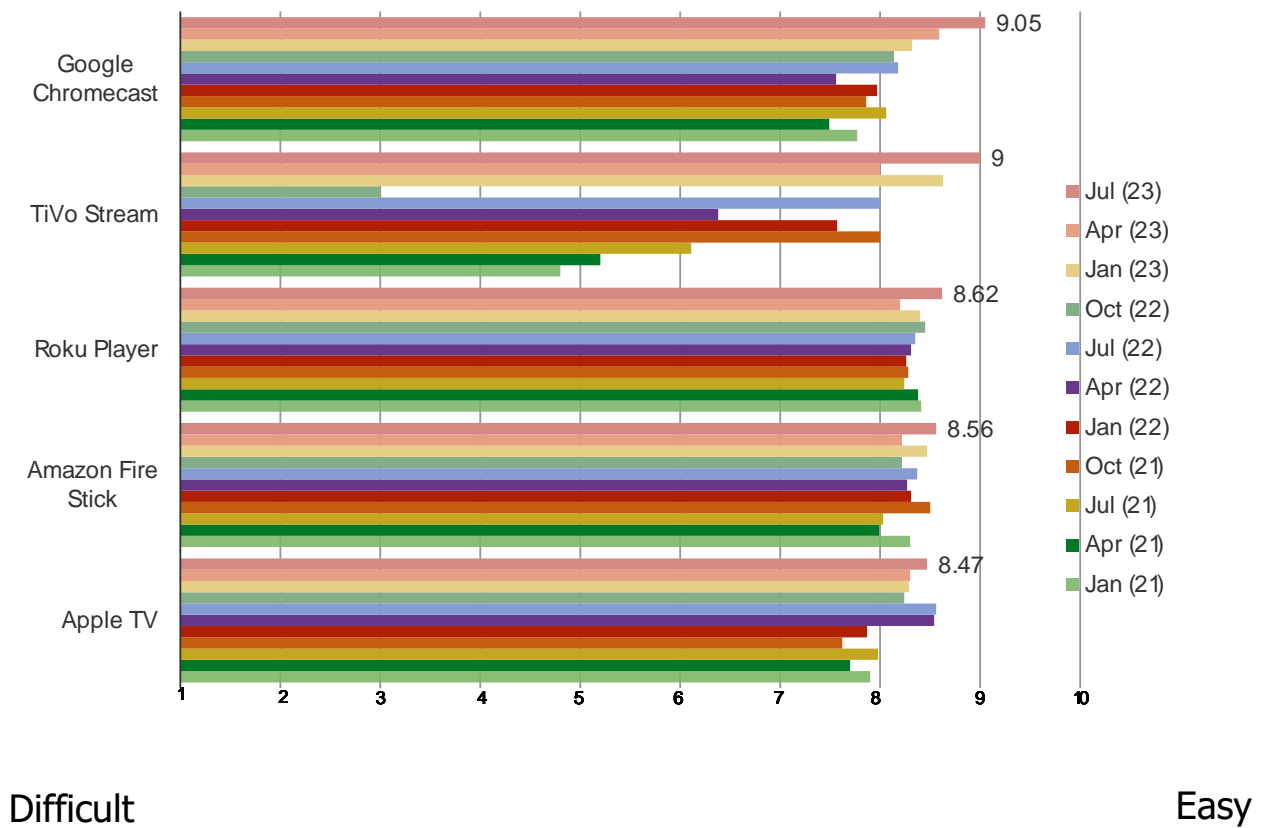
Posed to all respondents who own a smart TV and use each of the following.



	N=
Apple TV	53
Roku Player	218
Amazon Fire Stick	164
Google Chromecast	42
TiVo Stream	2

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 STREAMING DEVICE?

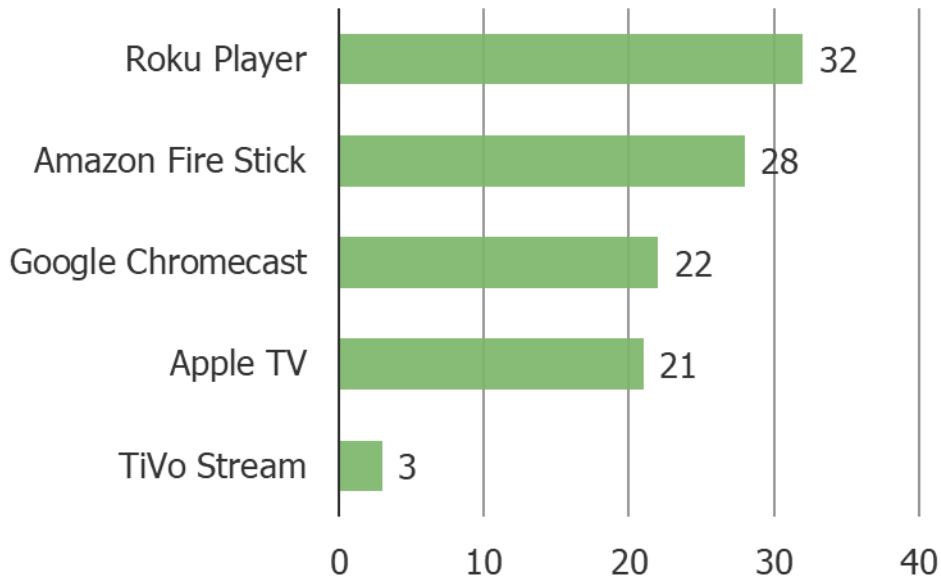
Posed to all respondents who own a smart TV and use each of the following.



	N=
Apple TV	53
Roku Player	218
Amazon Fire Stick	164
Google Chromecast	42
TiVo Stream	2

NPS SCORE | HOW LIKELY ARE YOU TO RECOMMEND THE OPERATING SYSTEM OF THE STREAMING PLAYER YOU CURRENTLY USE TO A FRIEND OR COLLEAGUE?

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

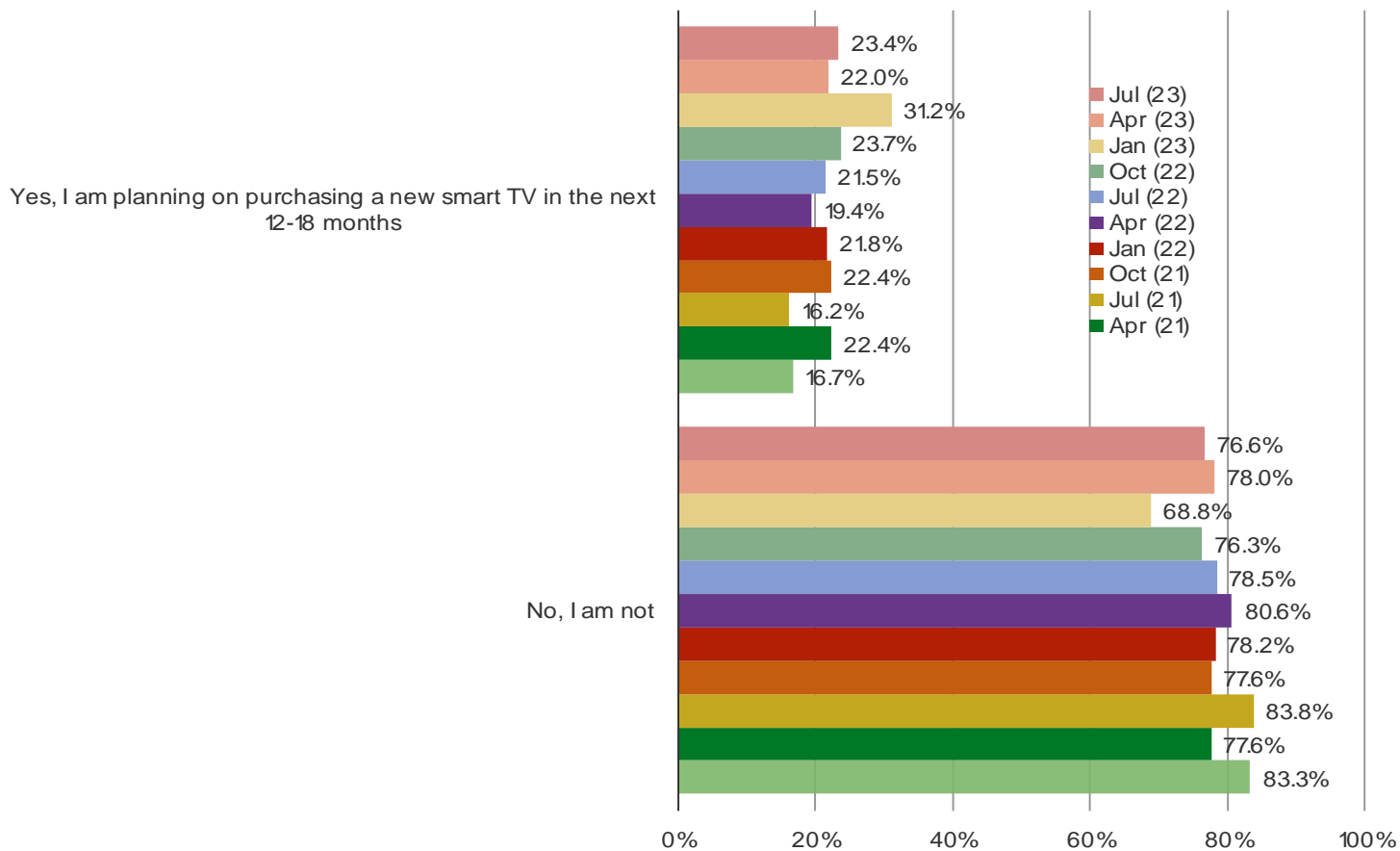


	N =
Roku Player	2802
Amazon Fire Stick	2299
Apple TV	764
Google Chromecast	761
TiVo Stream	87

Combining all prior waves to achieve larger N sizes.

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

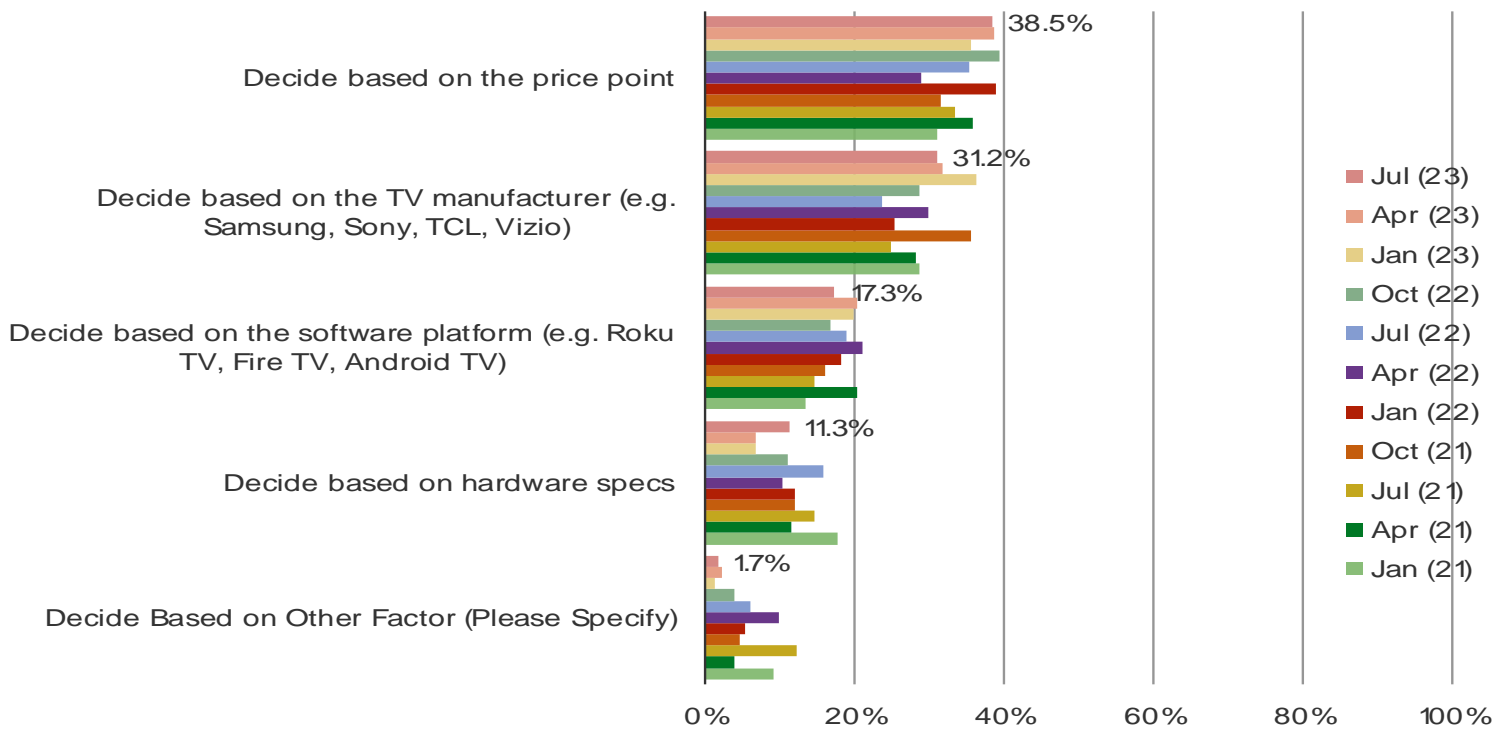
Posed to all respondents.



N = 988

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

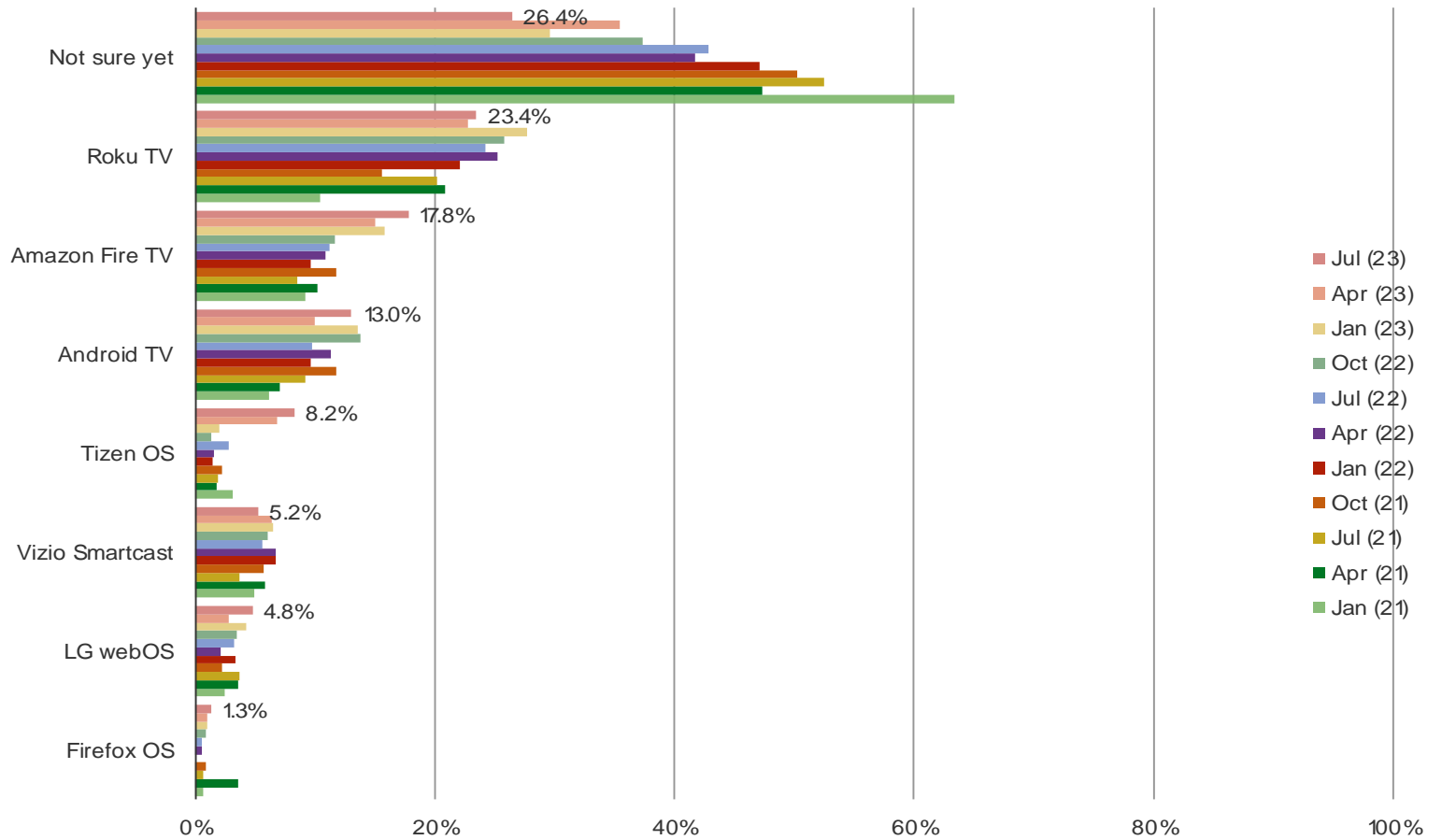
Posed to all respondents who have plans to purchase a smart TV in the next 12-18 months.



N = 231

WHICH SOFTWARE PLATFORM ARE YOU PLANNING TO GET?

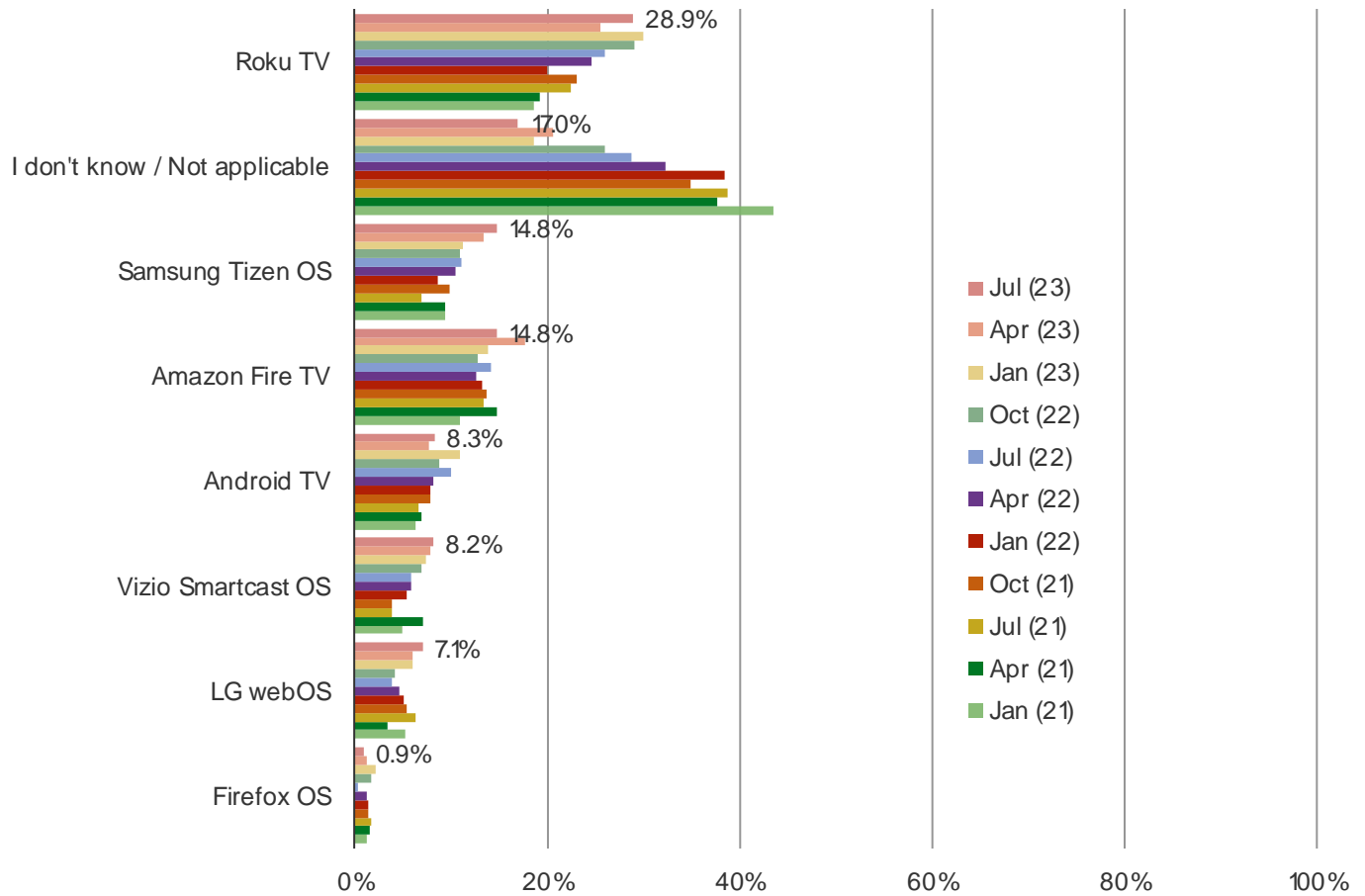
Posed to all respondents who have plans to purchase a smart TV in the next 12-18 months.



N = 231

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.

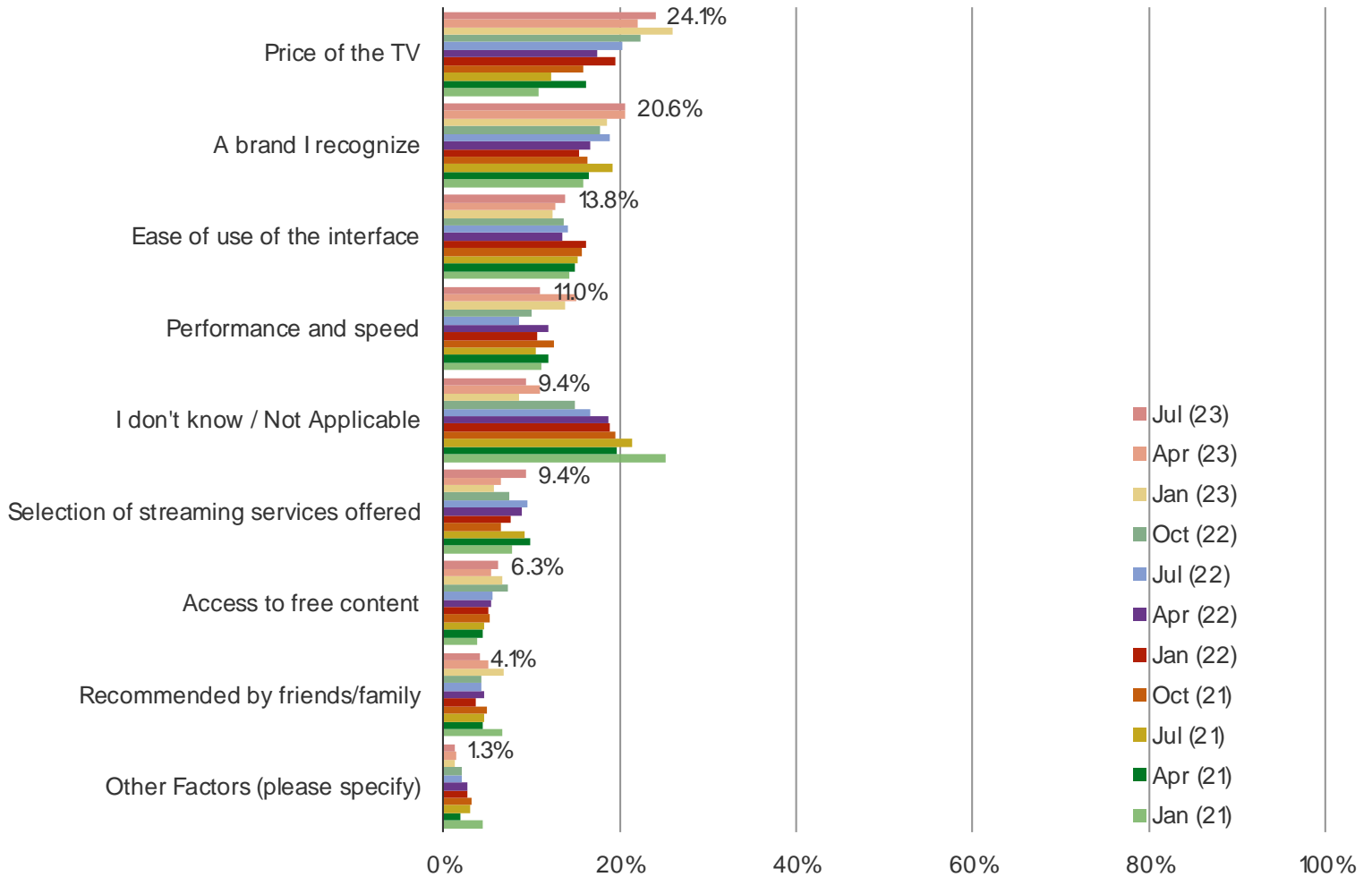


N = 636



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.

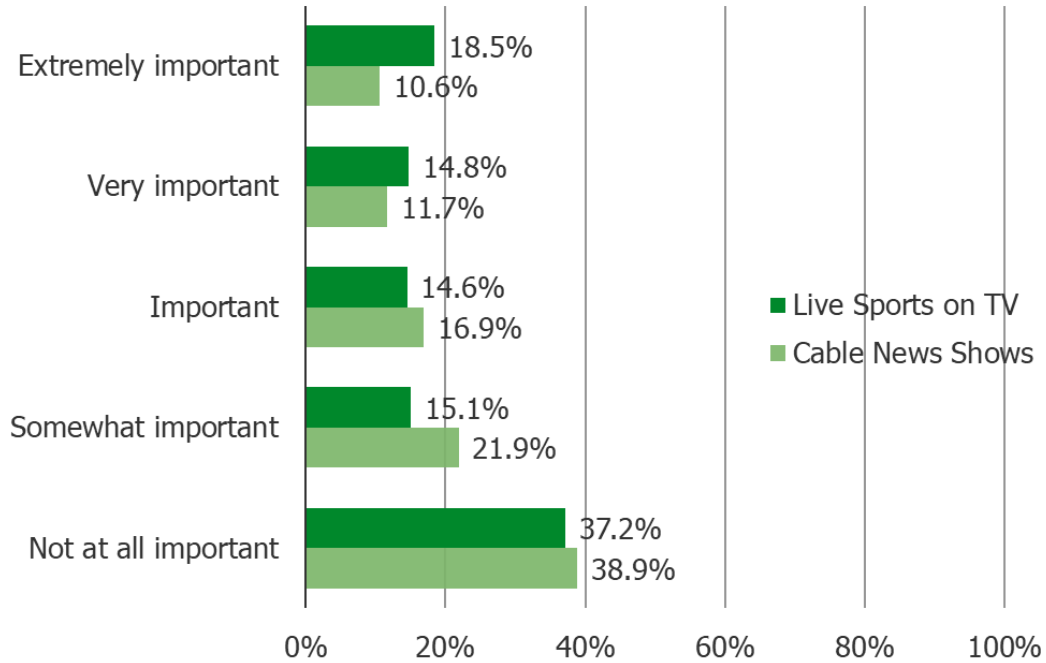


N = 636

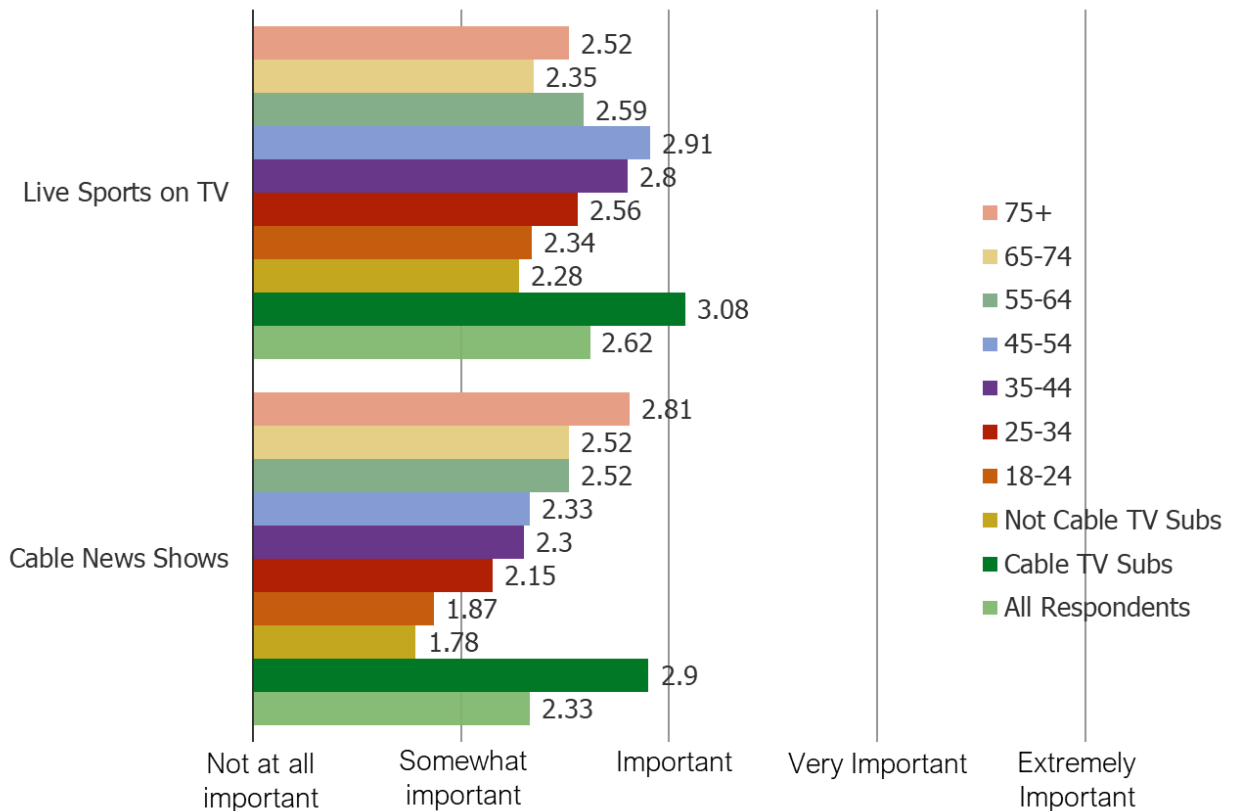
## CABLE TV PERSONALITIES AND LIVE SPORTS/EVENTS

HOW IMPORTANT ARE THE FOLLOWING TO YOU...

Posed to all respondents.

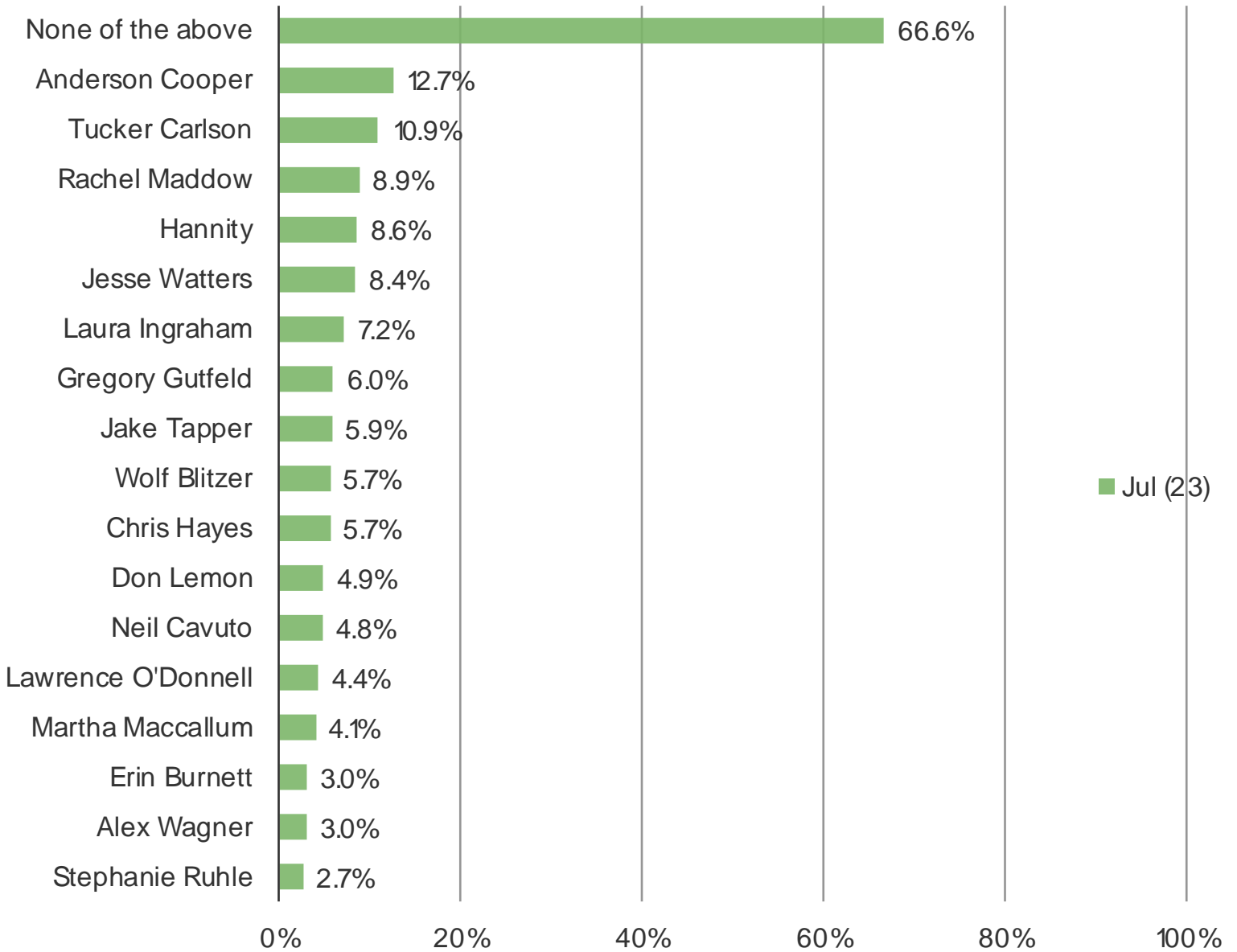


Cross-Tabs (Weighted Averages)



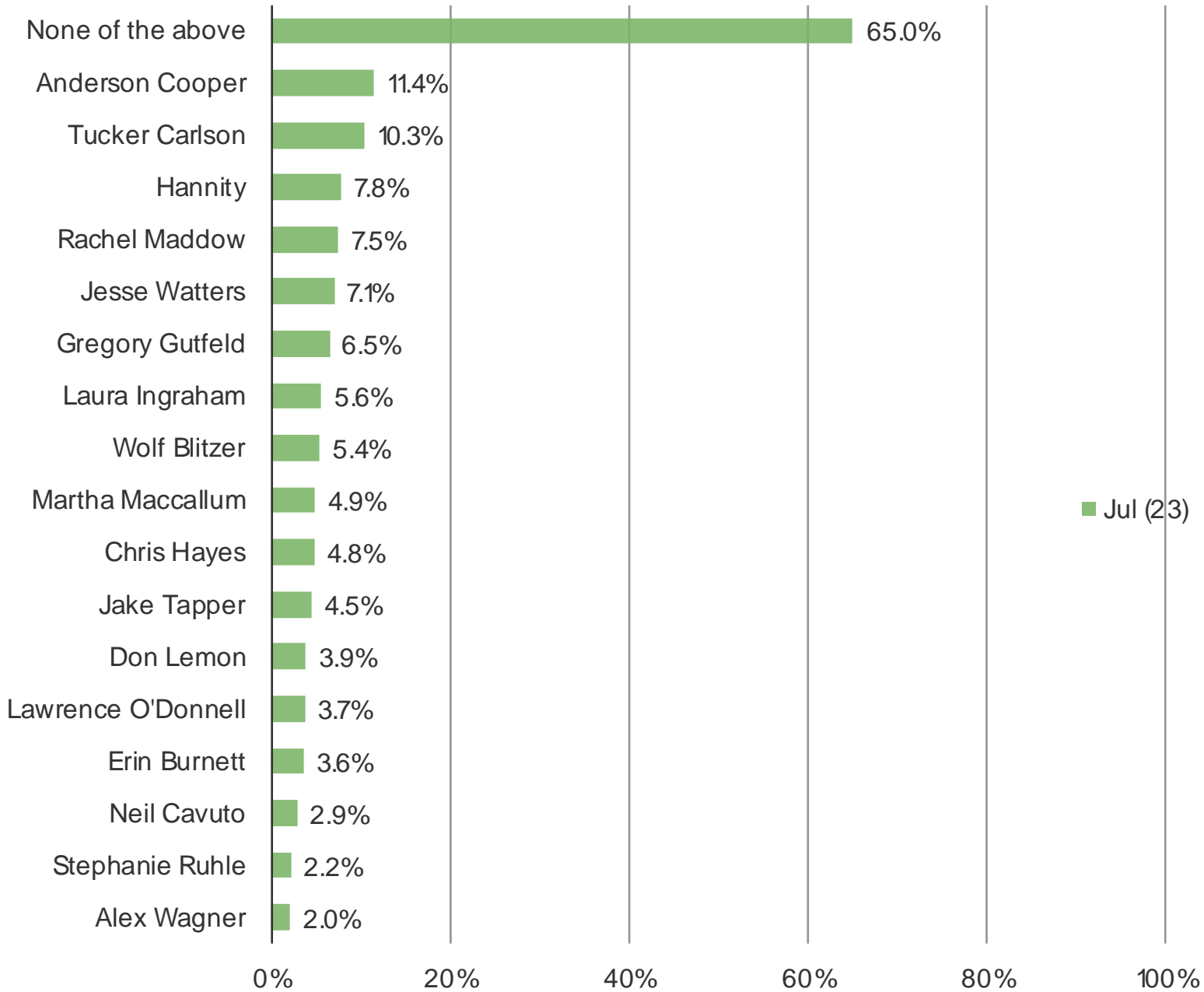
DO YOU WATCH ANY OF THE FOLLOWING REGULARLY? SELECT ALL THAT APPLY

Posed to all respondents.



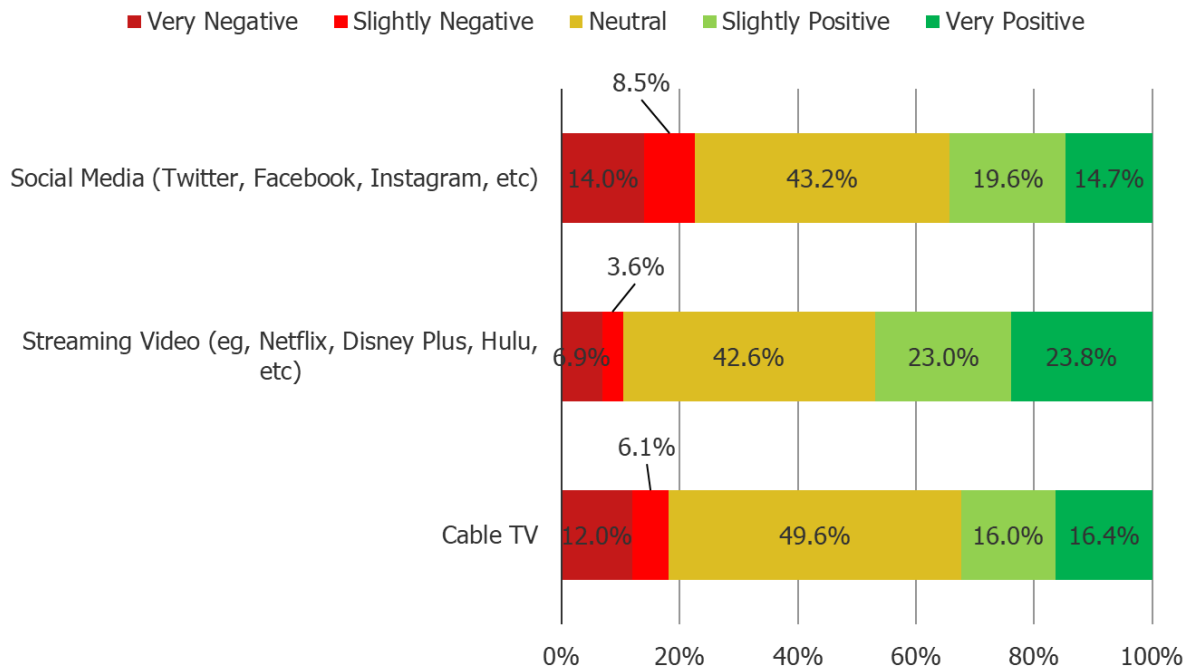
DO YOU CONSIDER YOURSELF A FAN OF ANY OF THE FOLLOWING? SELECT ALL THAT APPLY

Posed to all respondents.

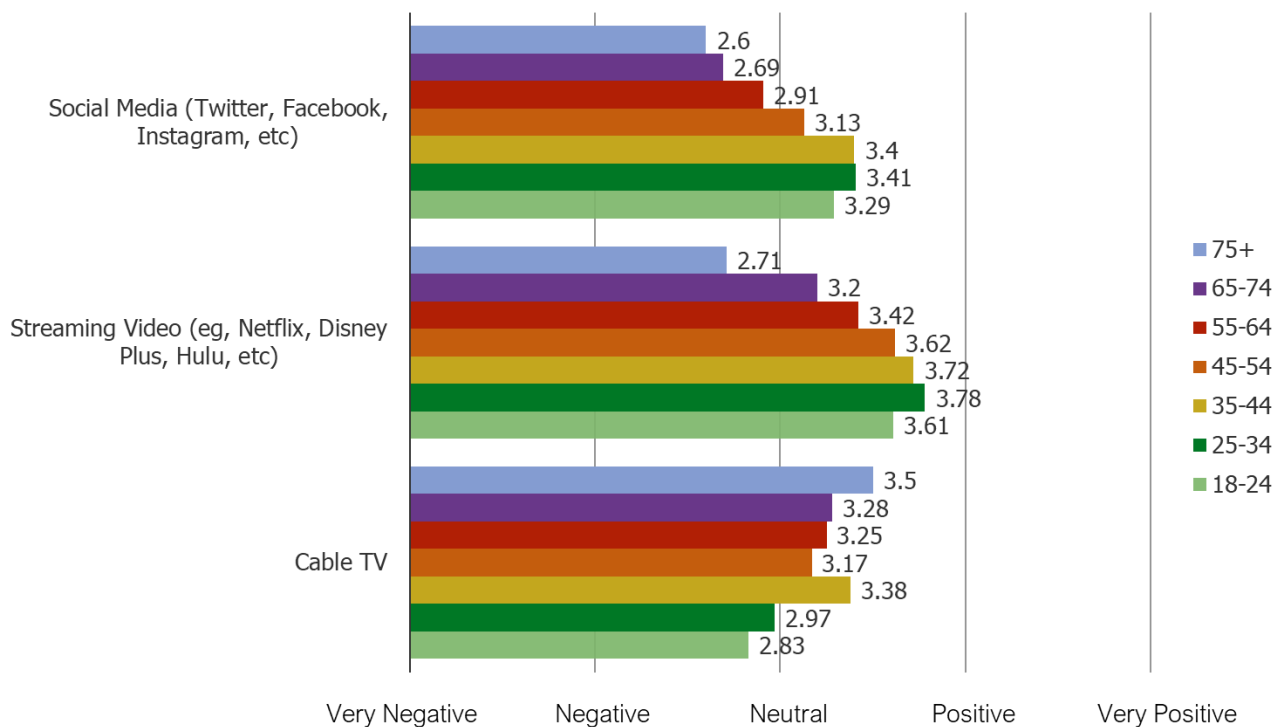


HOW DO YOU FEEL ABOUT WATCHING YOUR FAVORITE CABLE MEDIA PERSONALITIES ON THE FOLLOWING PLATFORMS?

Posed to all respondents.

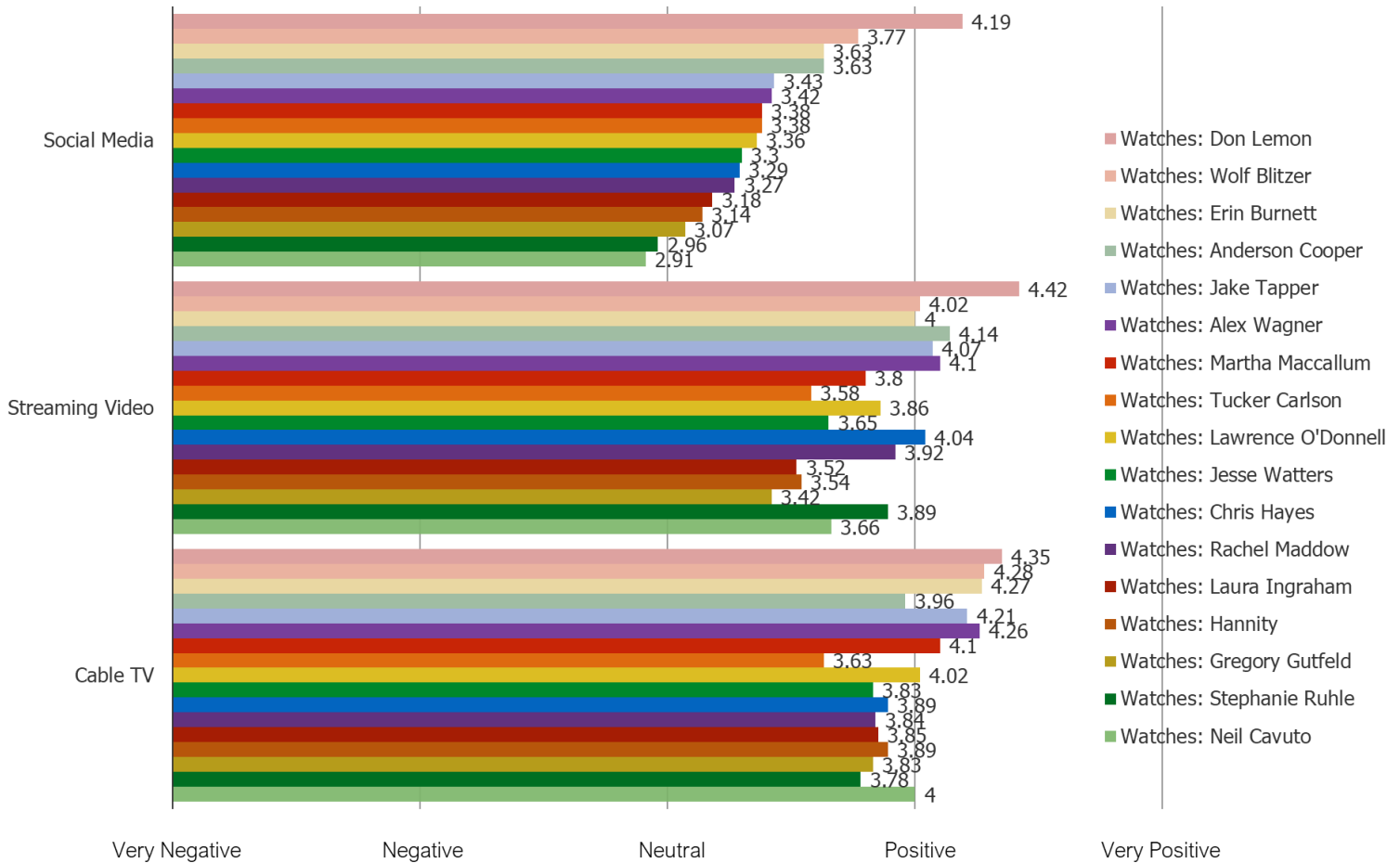


Cross-Tabs (Weighted Averages)



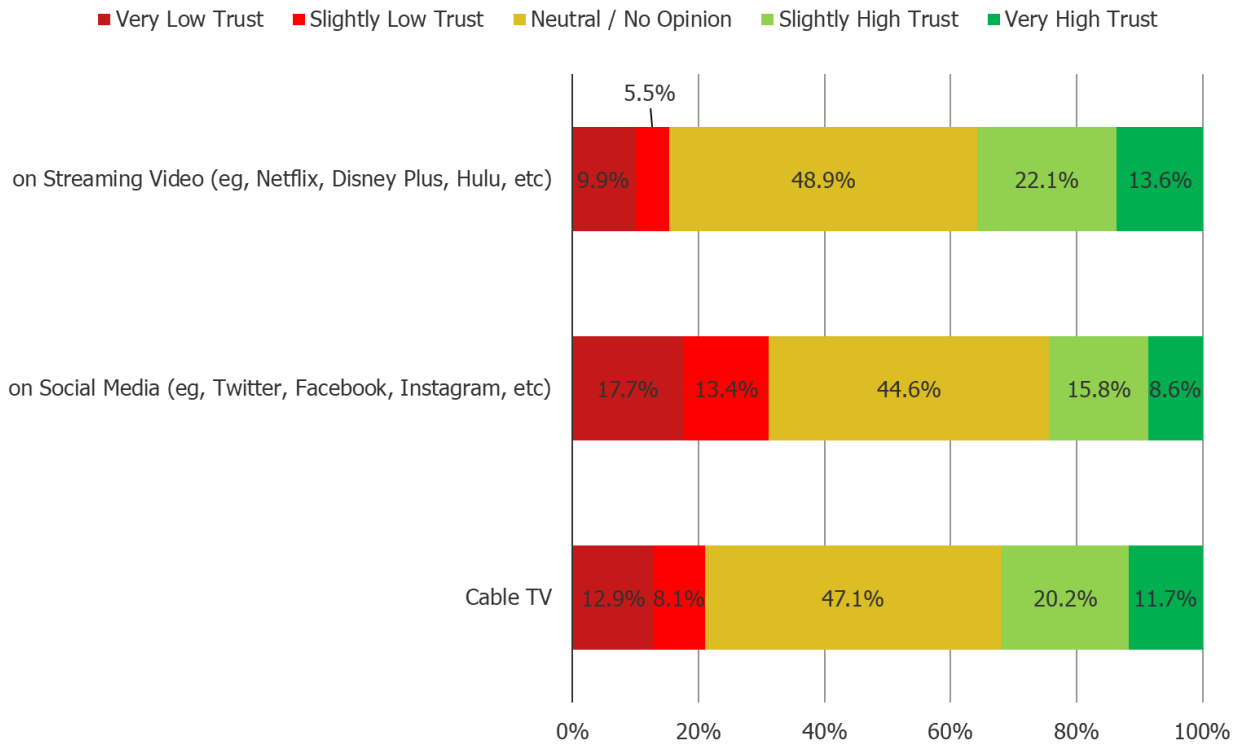
HOW DO YOU FEEL ABOUT WATCHING YOUR FAVORITE CABLE MEDIA PERSONALITIES ON THE FOLLOWING PLATFORMS?

Cross-Tab: Consumers who watch each of the following personalities

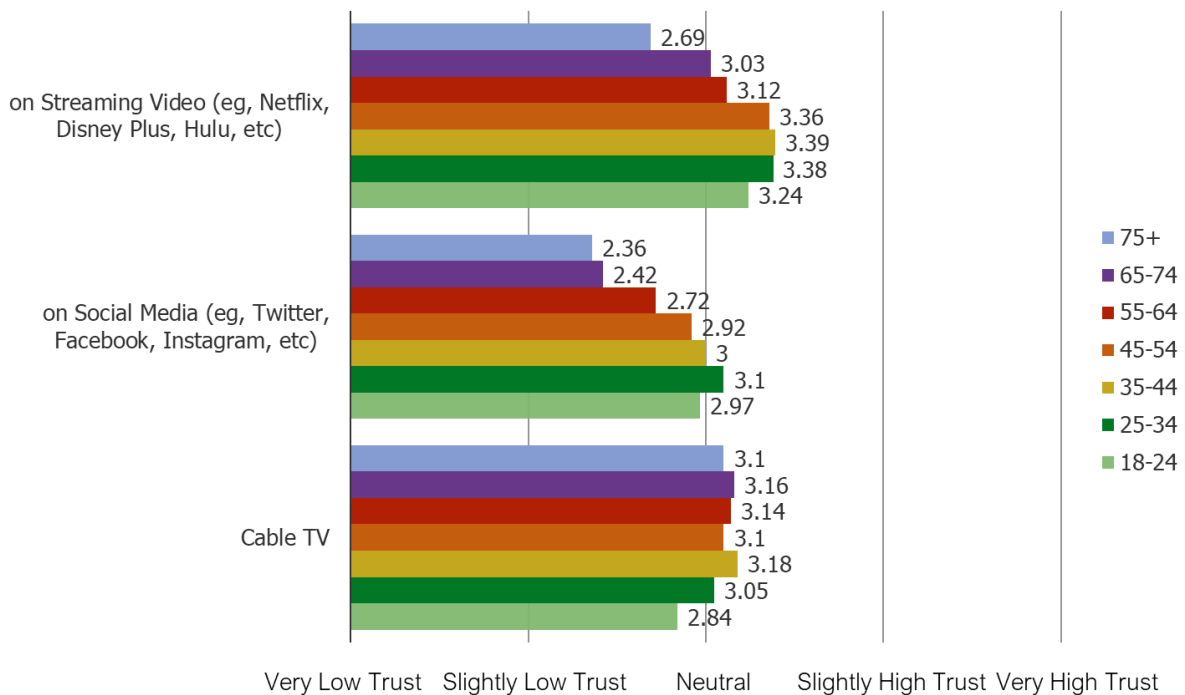


HOW MUCH TRUST DO YOU HAVE IN WATCHING VIDEO OF YOUR FAVORITE CABLE NEWS PERSONALITIES IN THE FOLLOWING FORUMS...

Posed to all respondents.



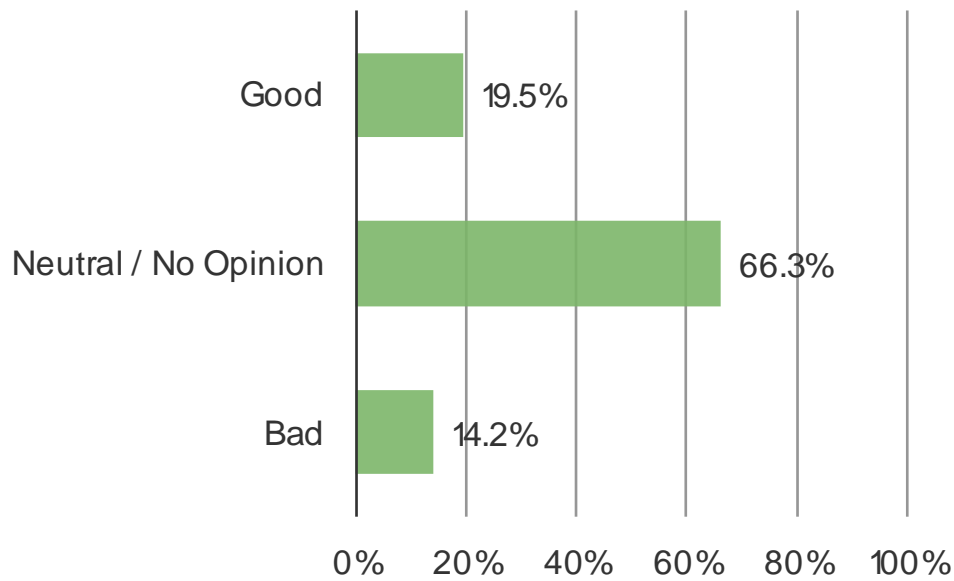
Cross-Tabs (Weighted Averages)





WOULD YOU CONSIDER IT A GOOD OR BAD THING IF YOUR FAVORITE CABLE NEWS PERSONALITY LEFT THE NETWORK AND SPOKE DIRECTLY TO THE AUDIENCE FROM THEIR OWN SOCIAL MEDIA PLATFORM (LIKE TWITTER)?

Posed to all respondents.



Cross-Tabs (Weighted Averages)

