

# Bespoke Survey Research

October 2023

## Streaming Players Survey (Roku Deep Dive)

Volume 12 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: ROKU, AMZN, AAPL.

### KPIs and Key questions

1. Roku channel watching frequency feedback is improved sequentially and sentiment is positive / improved in the second half of 2023 compared to the first half of the year.
2. The share of consumers who watching streaming video on their TV has been increasing over time. Smart TV with a built-in streaming OS has gained considerable share over time as a mechanism for watching at home. The share of consumers using dedicated streaming devices has held roughly unchanged since 2021.
3. Roku is a share leader when it comes to dedicated streaming devices and smart TV OS. Feedback from users around ease of using the interface and satisfaction is very strong.
4. Of all the options tested, Roku has the strongest NPS scores.
5. Among respondents in the market for a new TV, an increasing share say they will decide based on price point.

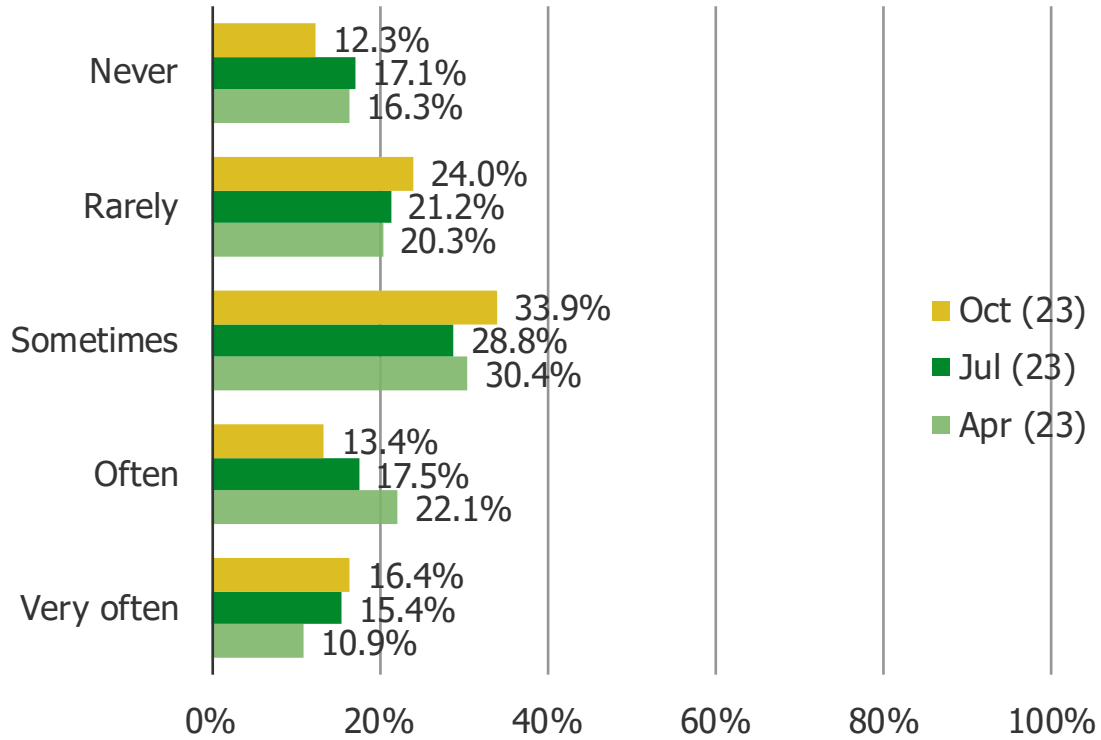
### Noteworthy Stats:

- 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

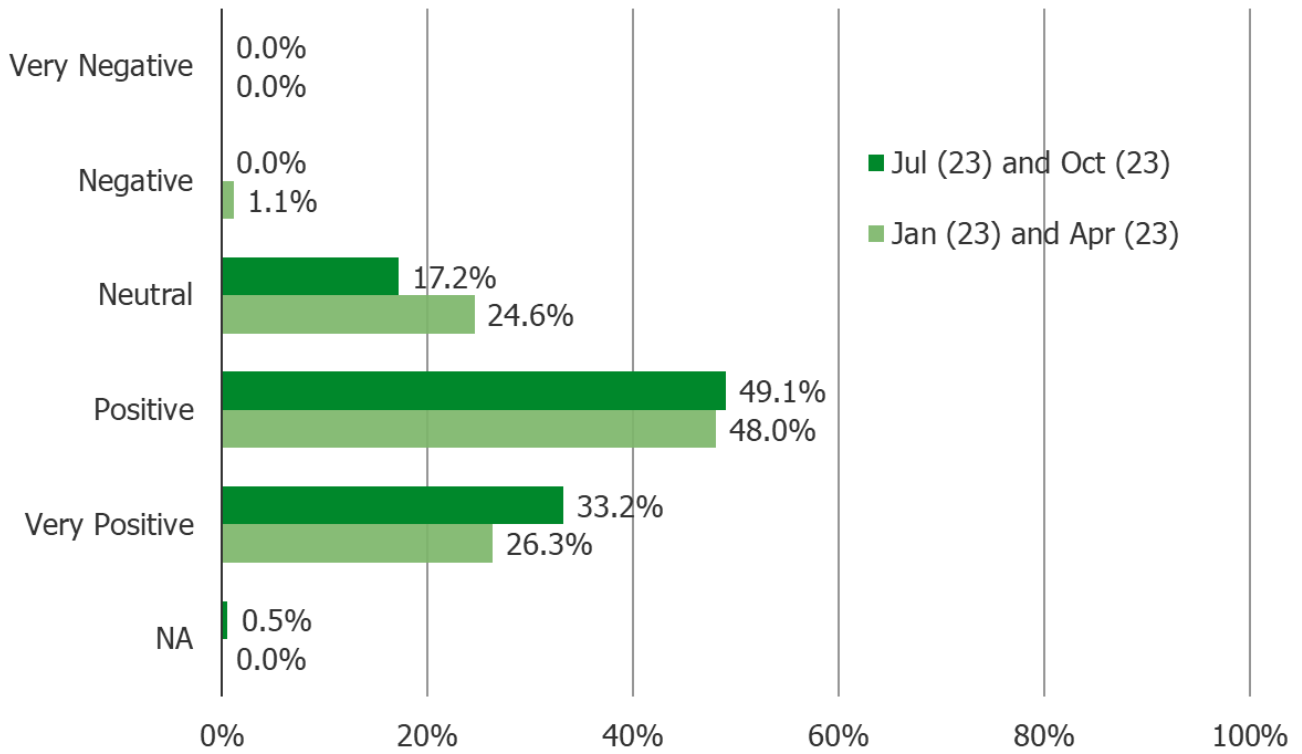
HOW OFTEN DO YOU WATCH THE ROKU CHANNEL?

Posed to respondents who have a TV that uses the Roku OS or owns a Roku streaming player (N = 293).



WHAT IS YOUR OPINION OF THE ROKU CHANNEL?

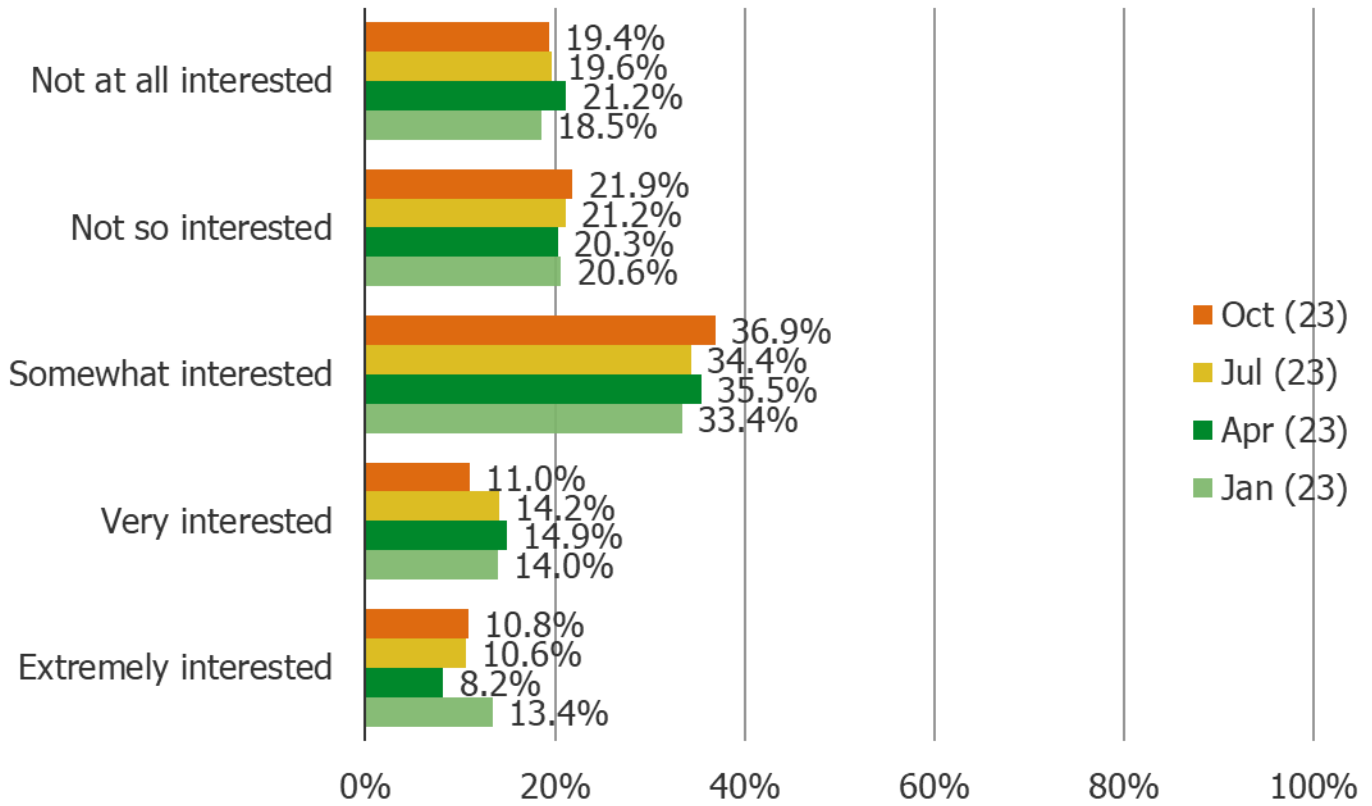
Posed to Roku users who watch the Roku Channel sometimes, often, or very often.



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

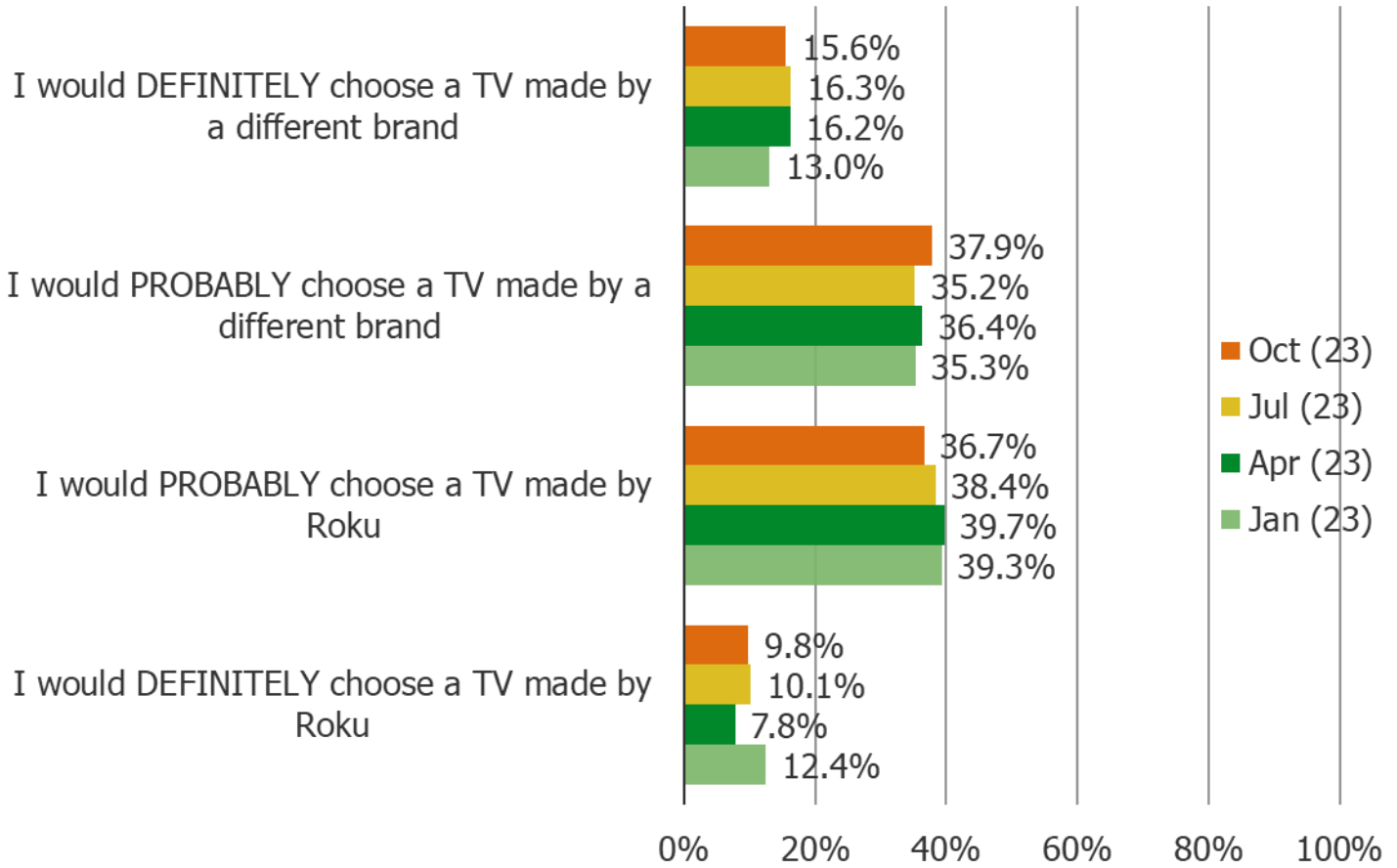
HOW INTERESTED WOULD YOU BE IN GETTING A TV THAT WAS ACTUALLY MANUFACTURED BY ROKU?

Posed to all respondents.



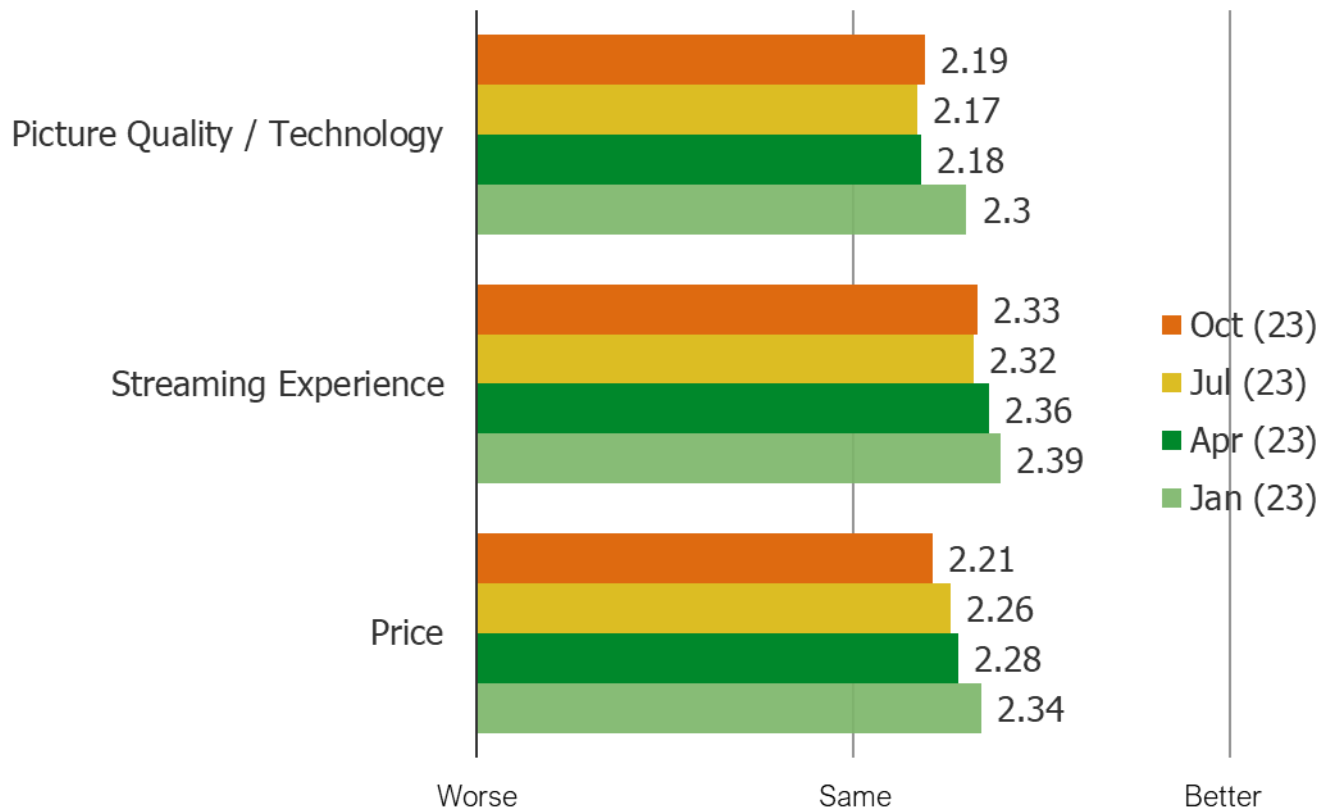
HOW LIKELY WOULD YOU BE TO BUY A TV THAT WAS MANUFACTURED BY ROKU WHEN YOU ARE BUYING YOUR NEXT TV?

Posed to all respondents.



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.

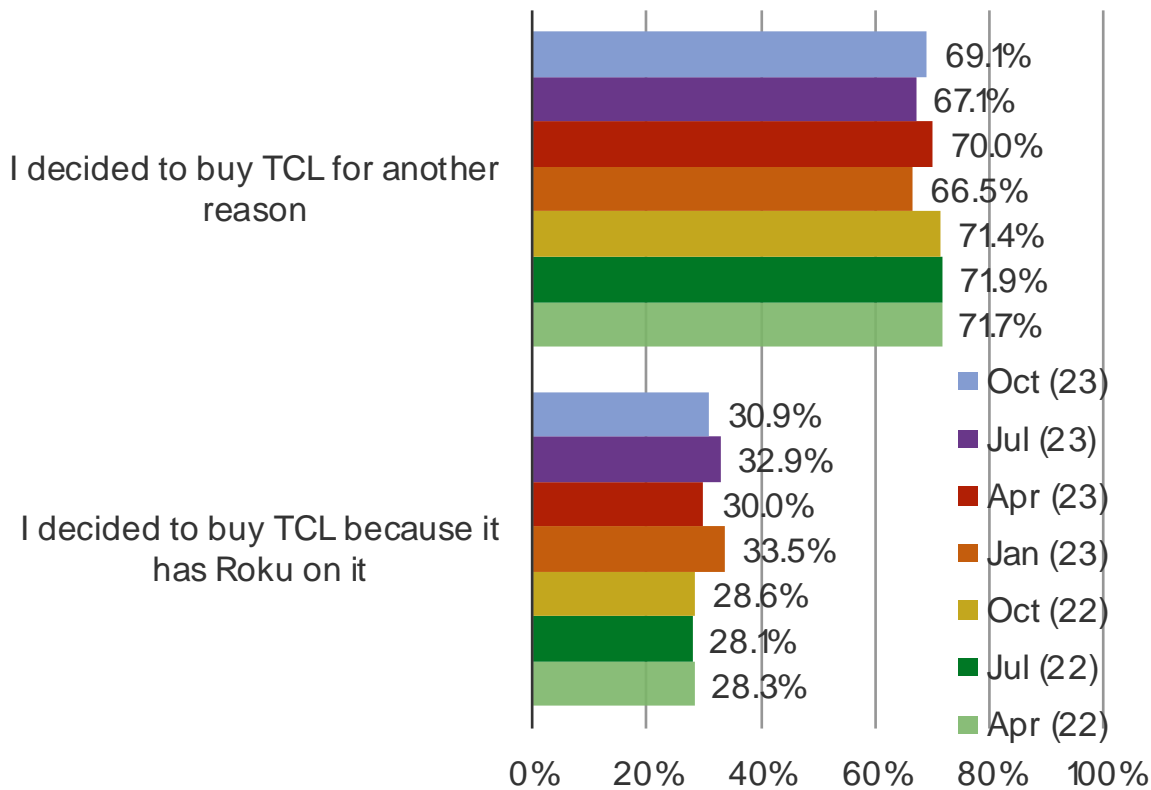


# ROKU SURVEY CHARTS



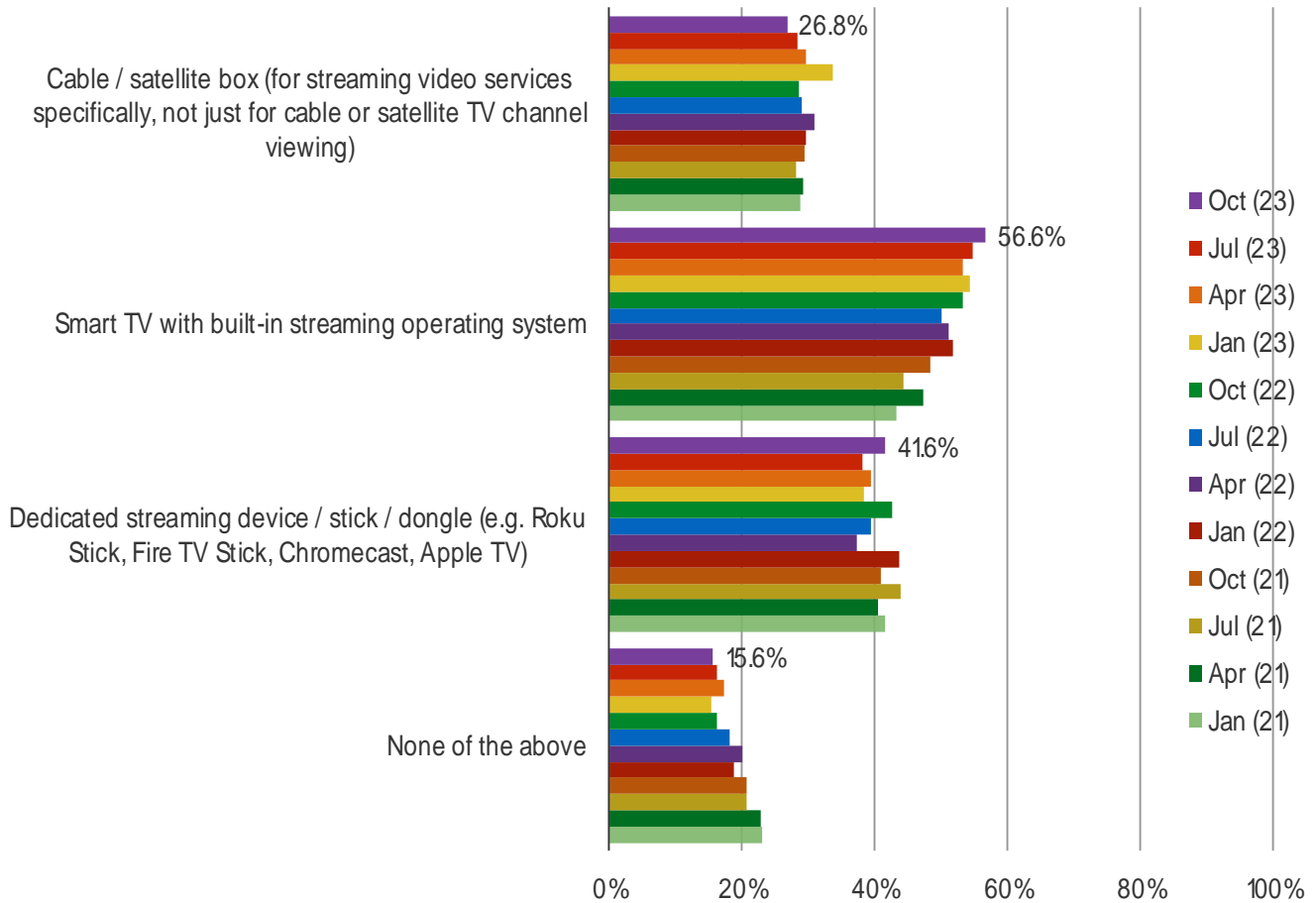
THINKING ABOUT YOUR TCL TV, WHICH OF THE FOLLOWING DESCRIBES YOU...

Posed to all respondents who have a TCL TV.



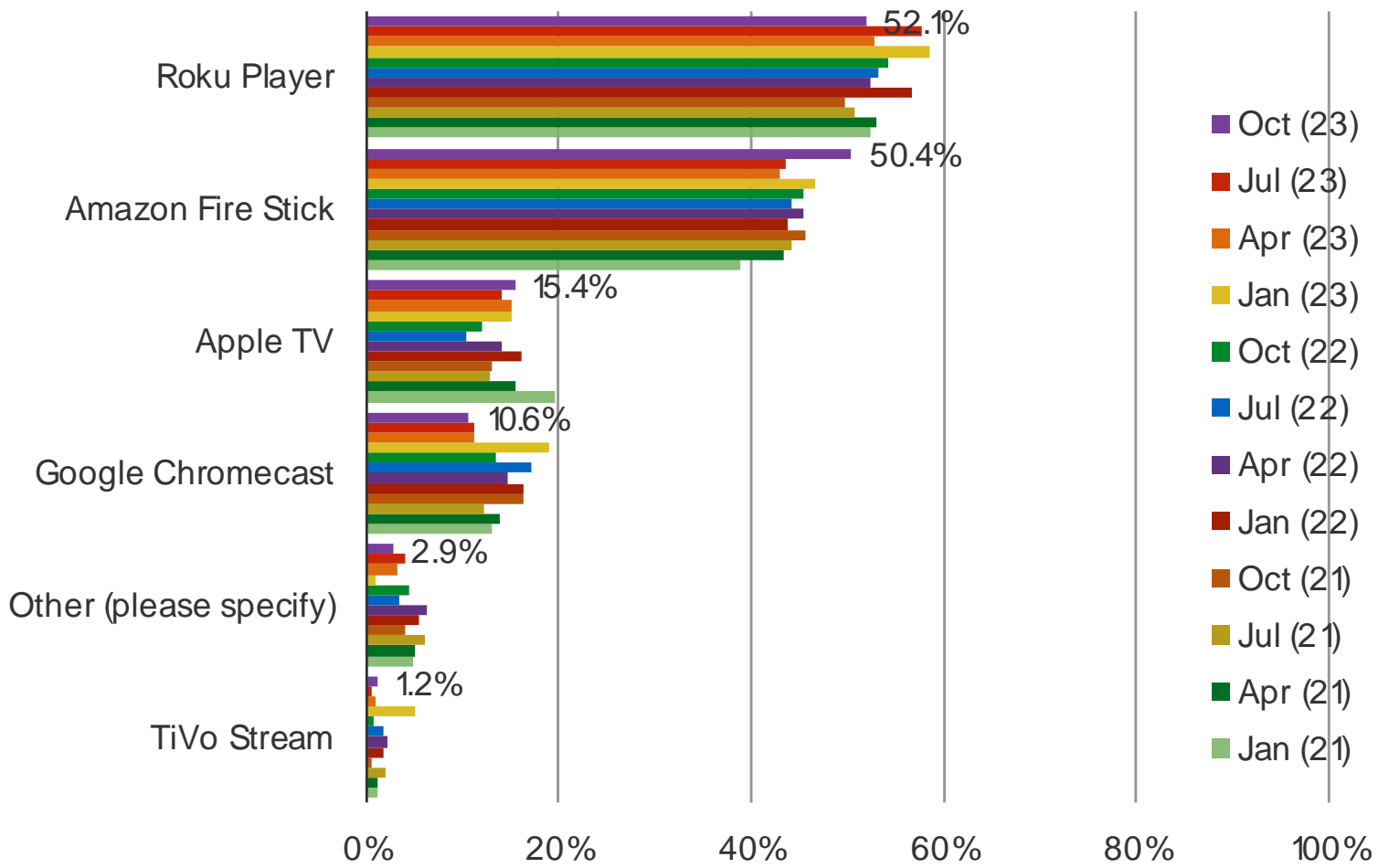
WHAT HARDWARE DO YOU USE TO WATCH STREAMING VIDEO ON YOUR TV? (SELECT ALL THAT APPLY)

Posed to all respondents.



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

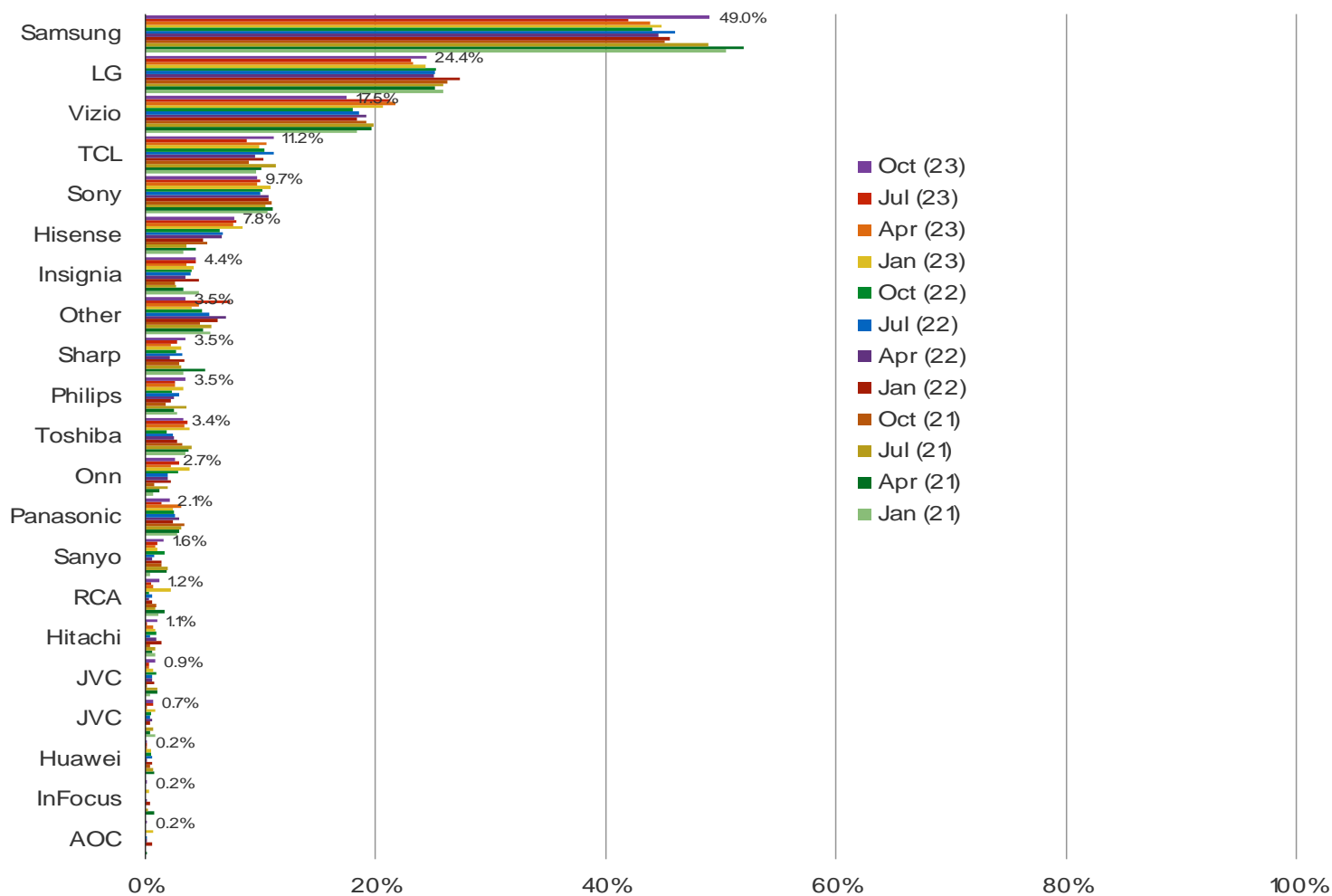
Posed to all respondents who use streaming devices.



N = 417

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

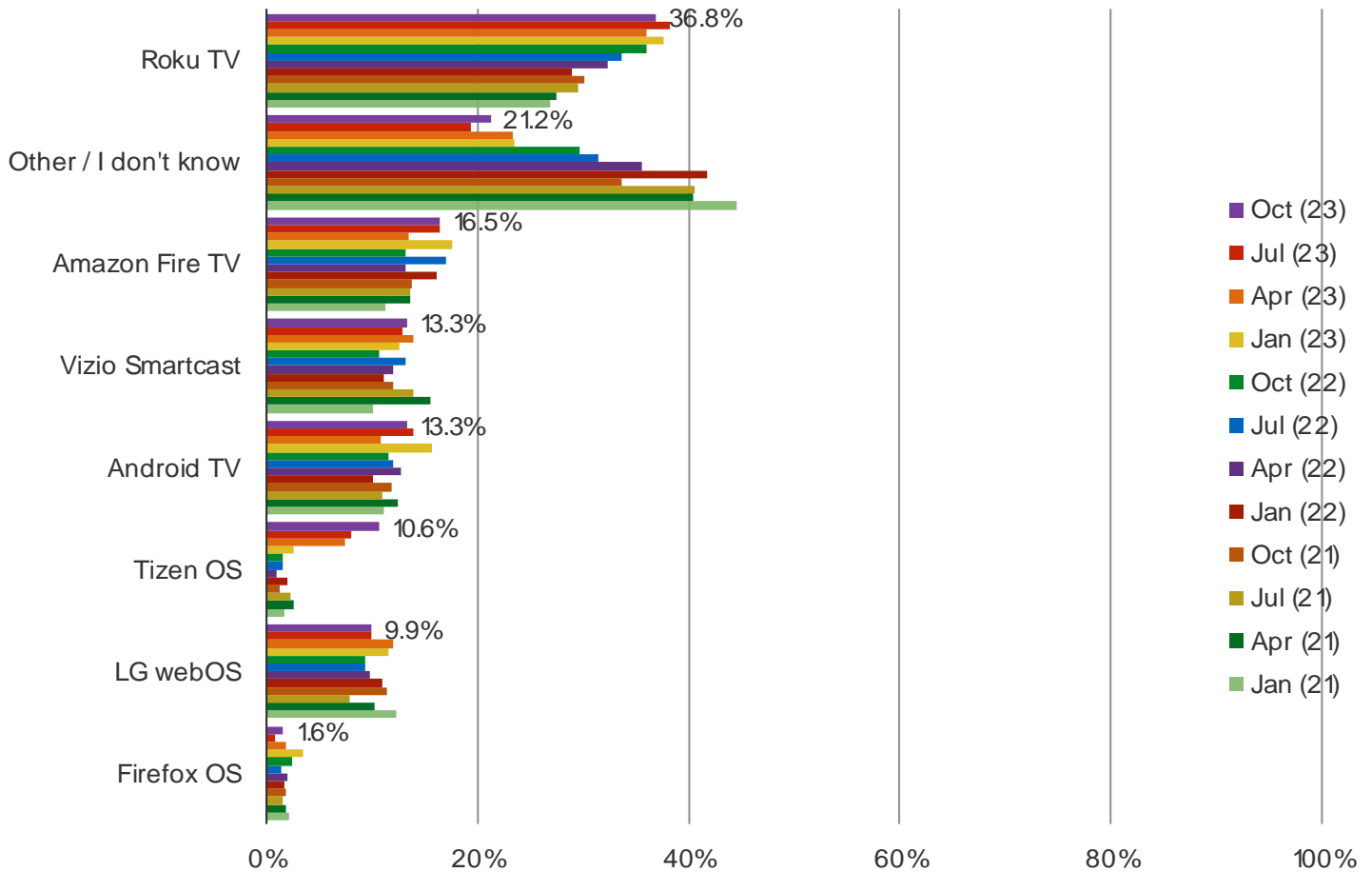
Posed to all respondents who own a smart TV.



N = 569

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

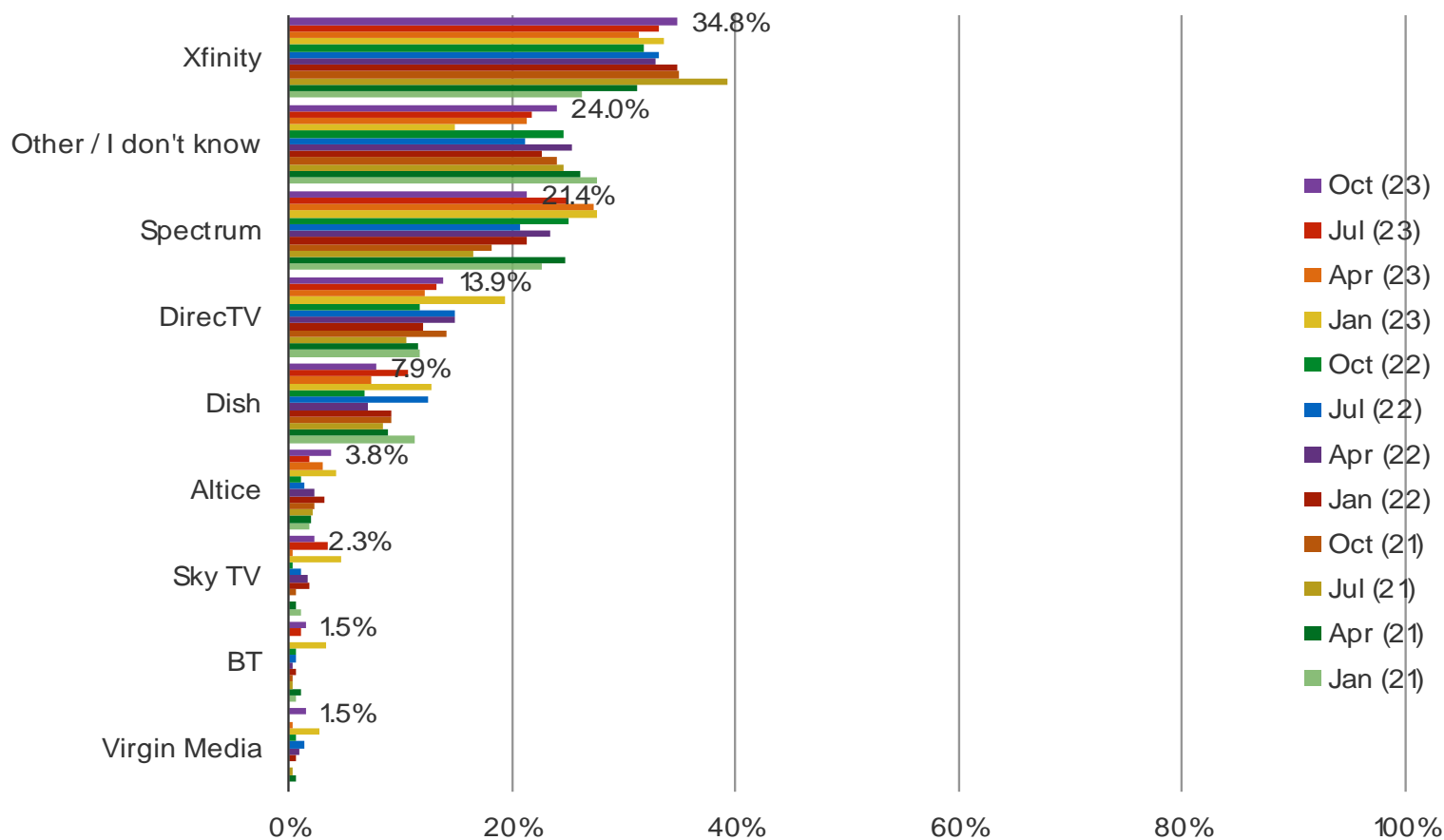
Posed to all respondents who own a smart TV.



N = 569

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

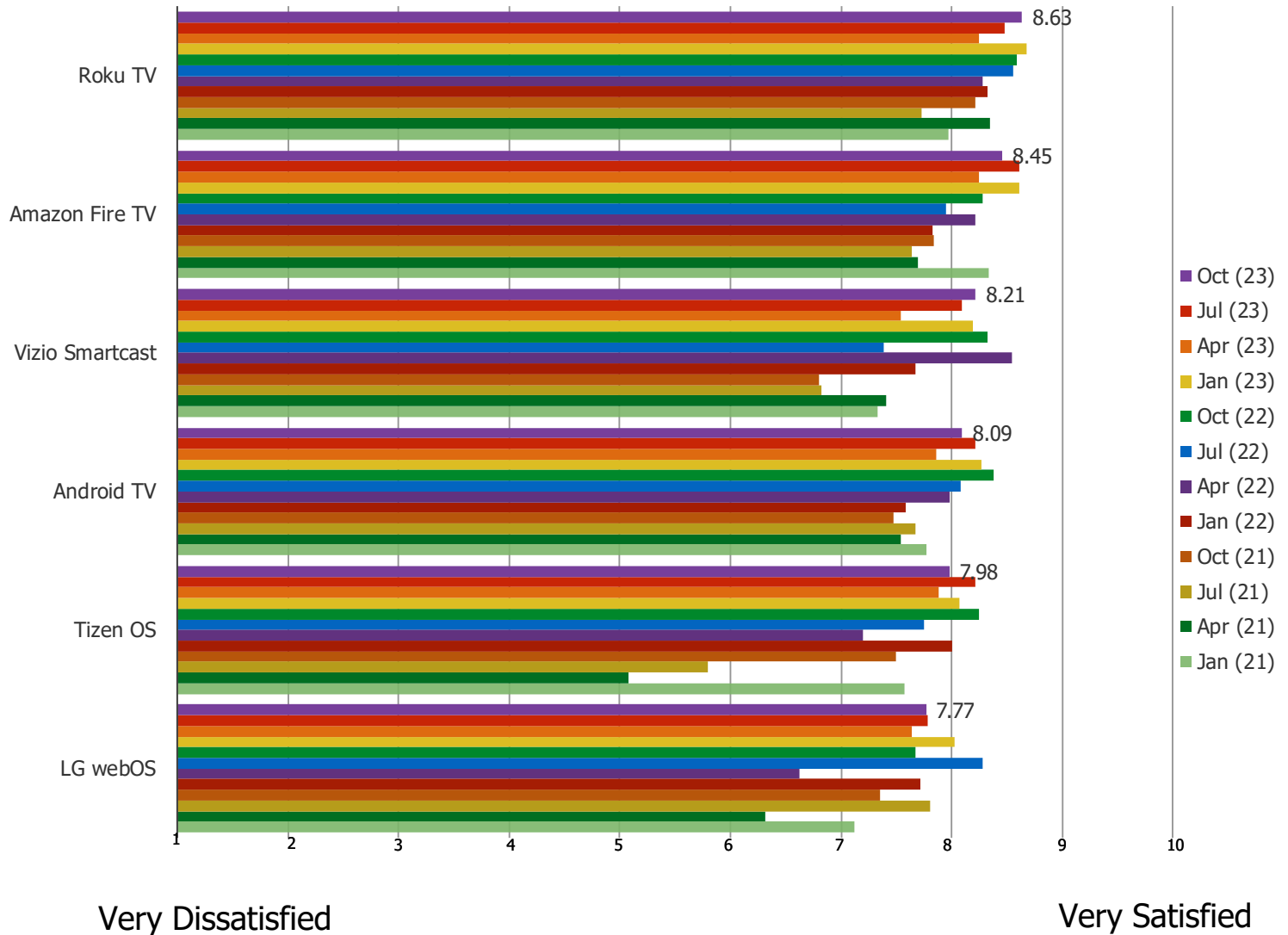
Posed to all respondents who use streaming devices.



N = 267

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

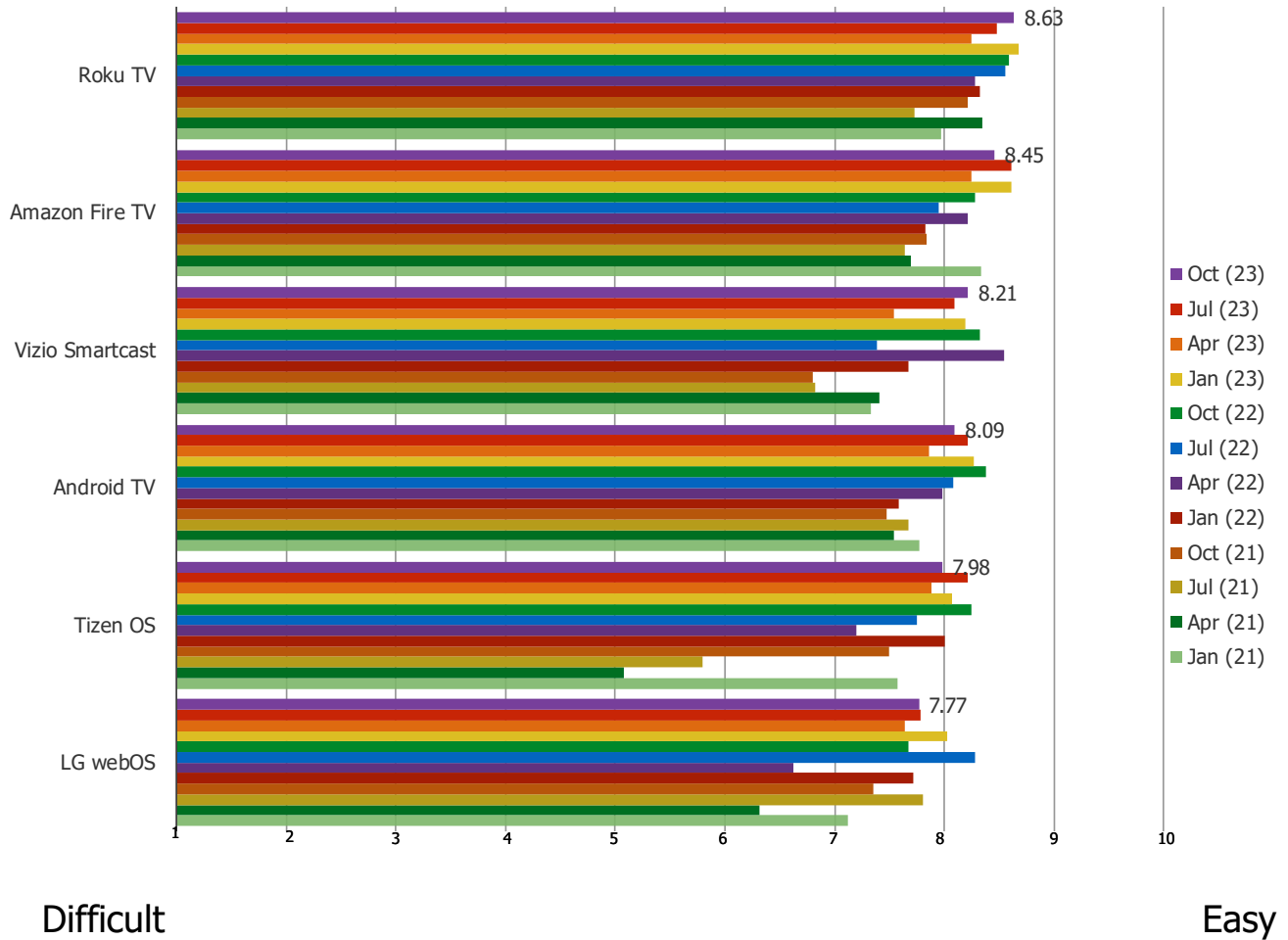
Posed to all respondents who own a smart TV and use each of the following.



	N =
Roku TV	209
Amazon Fire TV	95
Vizio Smartcast	76
Google TV or Android TV	75
Tizen OS (Samsung)	60
LG webOS	56

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.

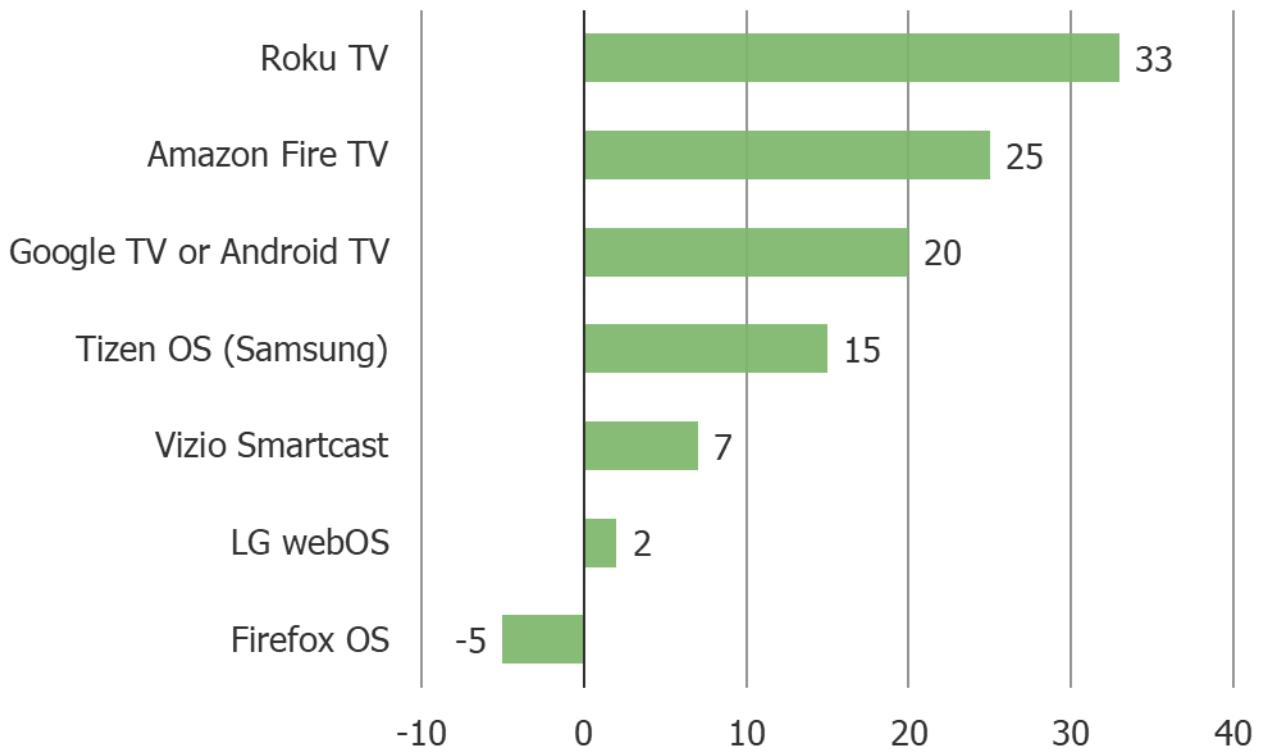


	N =
Roku TV	209
Amazon Fire TV	95
Vizio Smartcast	76
Google TV or Android TV	75
Tizen OS (Samsung)	60
LG webOS	56



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.

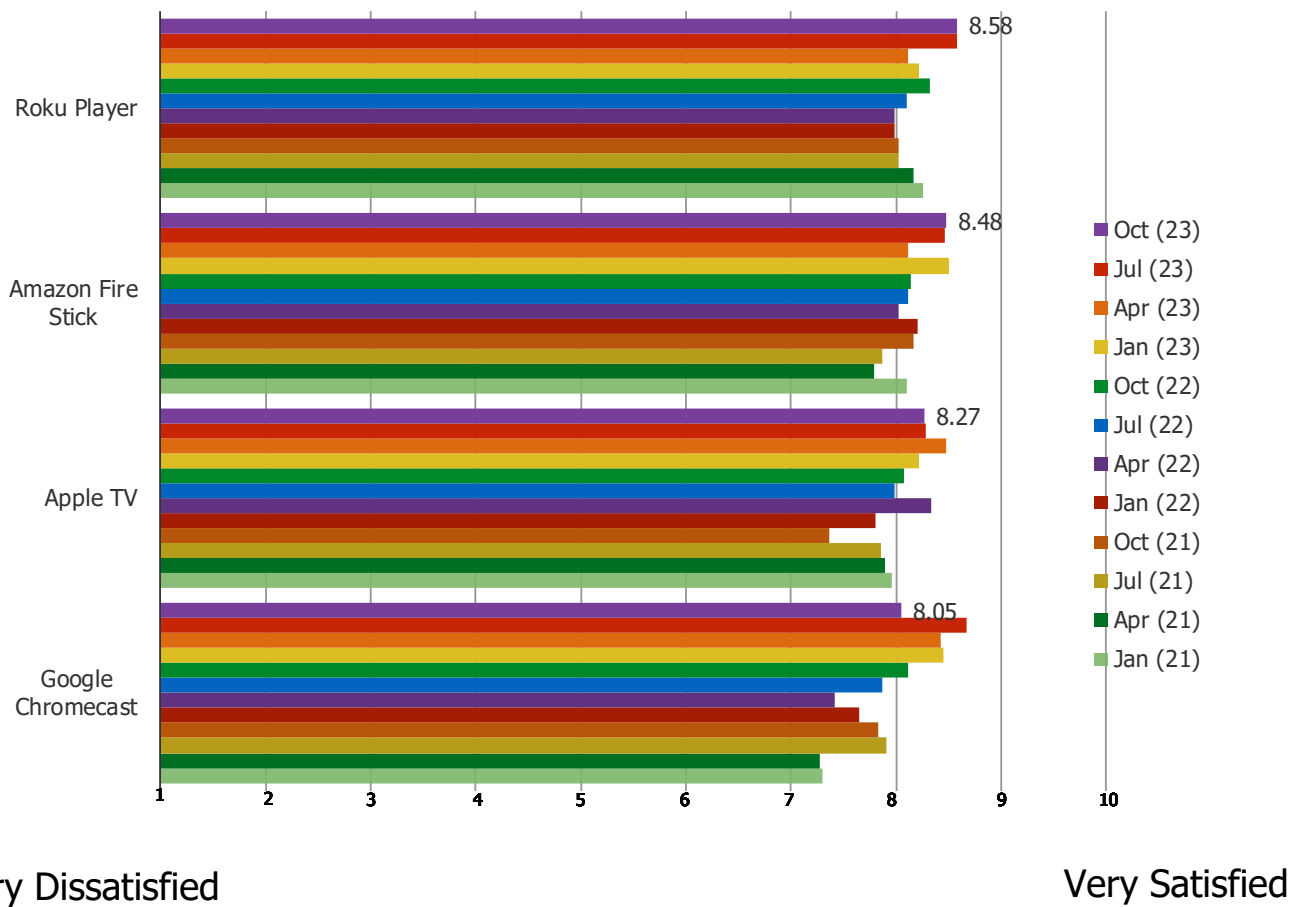


Combining all prior waves to achieve larger N sizes.

	N =
Roku TV	2345
Amazon Fire TV	1043
Vizio Smartcast	886
Google TV or Android TV	876
LG webOS	740
Tizen OS (Samsung)	243
Firefox OS	141

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

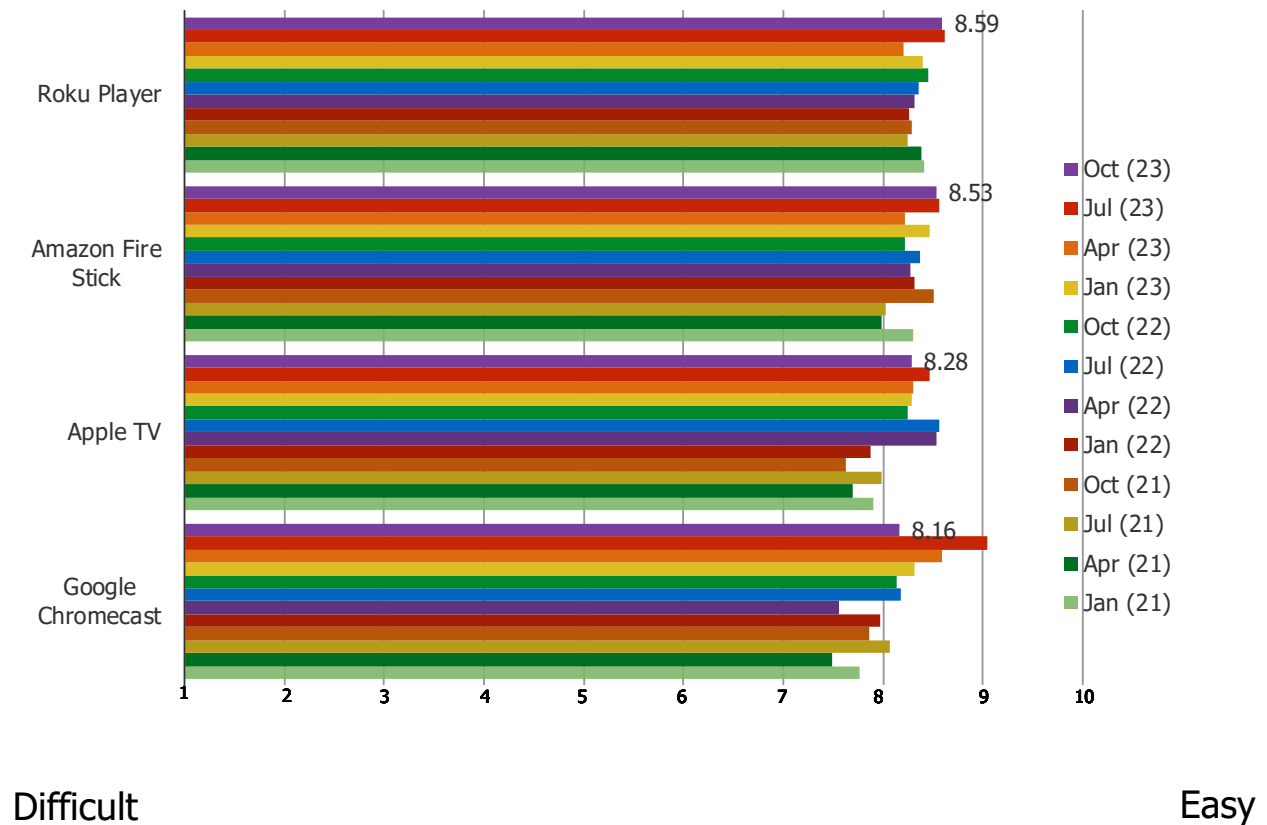
Posed to all respondents who own a smart TV and use each of the following.



	N=
Roku Player	217
Amazon Fire Stick	210
Apple TV	64
Google Chromecast	44

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?

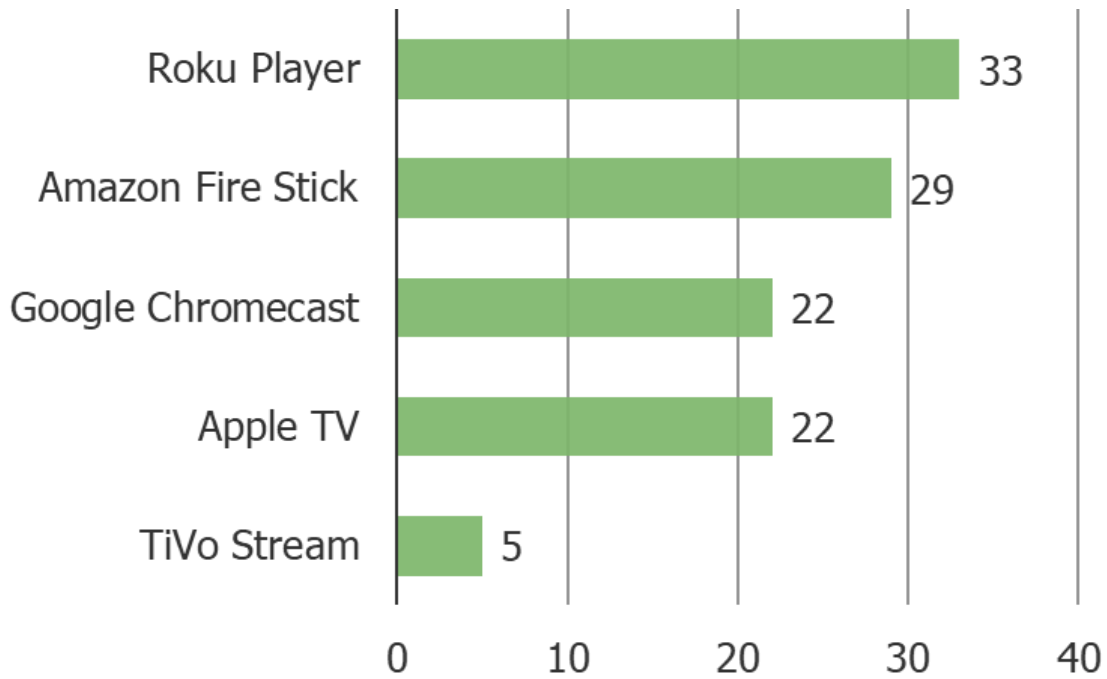
Posed to all respondents who own a smart TV and use each of the following.



	N=
Roku Player	217
Amazon Fire Stick	210
Apple TV	64
Google Chromecast	44

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.

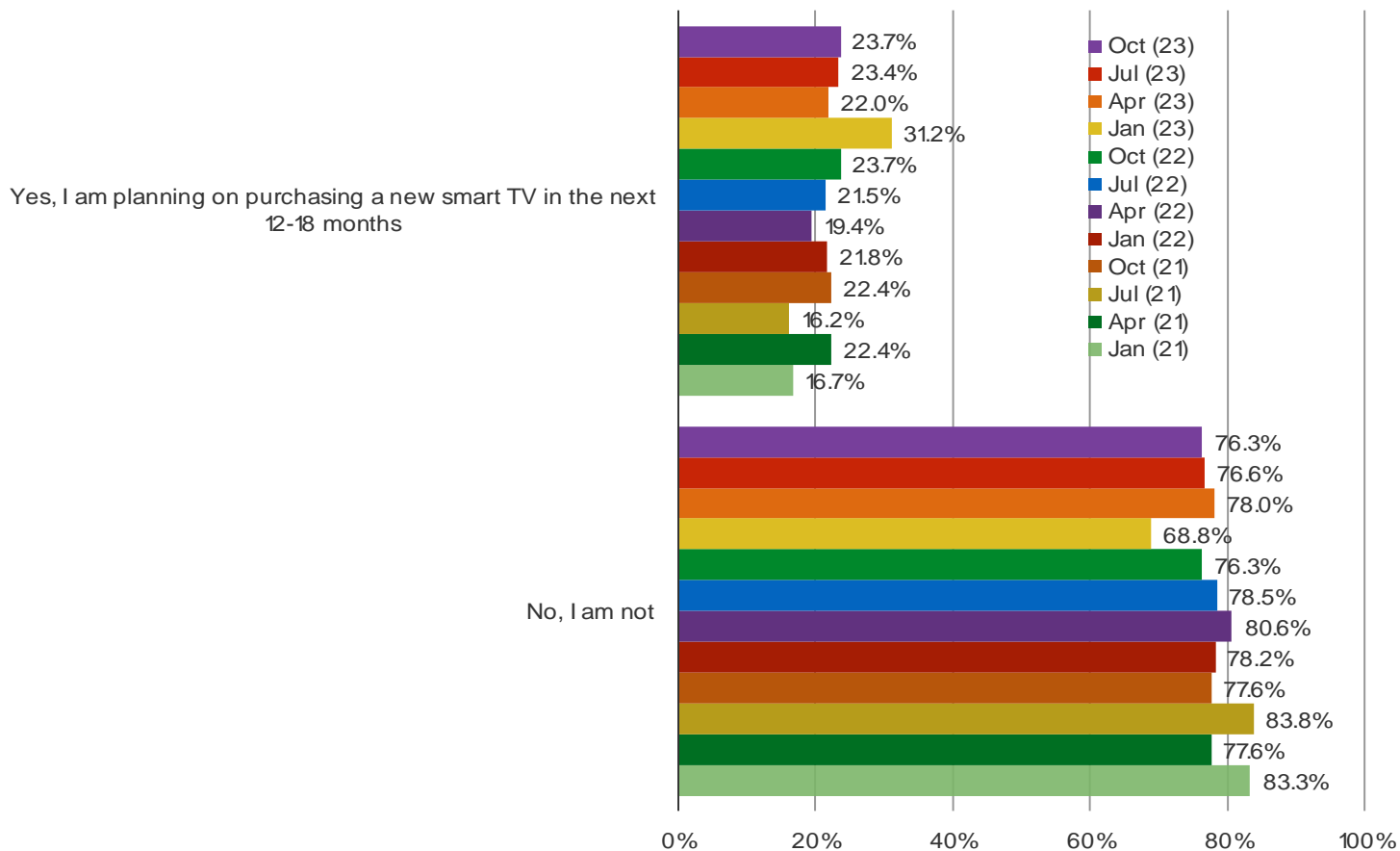


Combining all prior waves to achieve larger N sizes.

	N =
Roku Player	3019
Amazon Fire Stick	2509
Apple TV	828
Google Chromecast	805
TiVo Stream	92

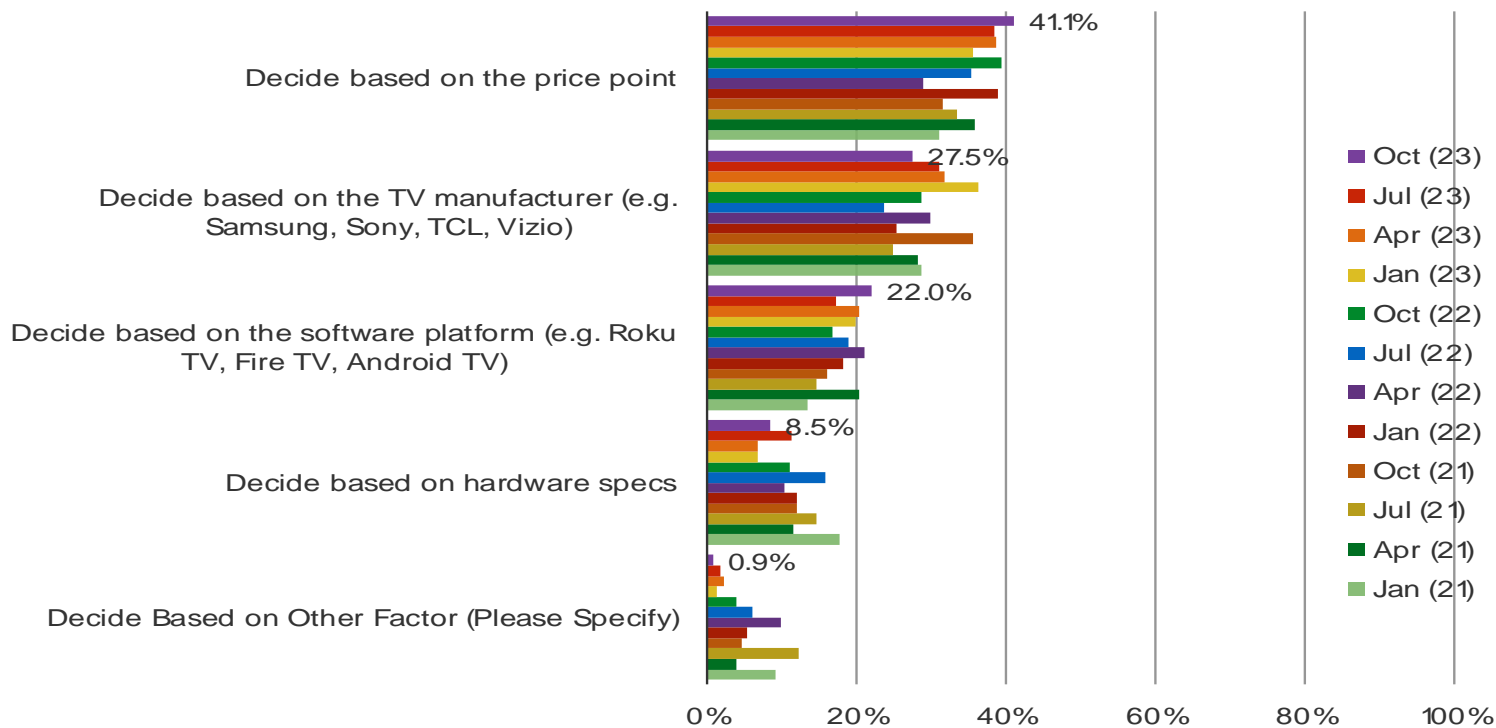
ARE YOU PLANNING ON PURCHASING A NEW SMART TV IN THE NEXT 12-18 MONTHS?

Posed to all respondents.



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

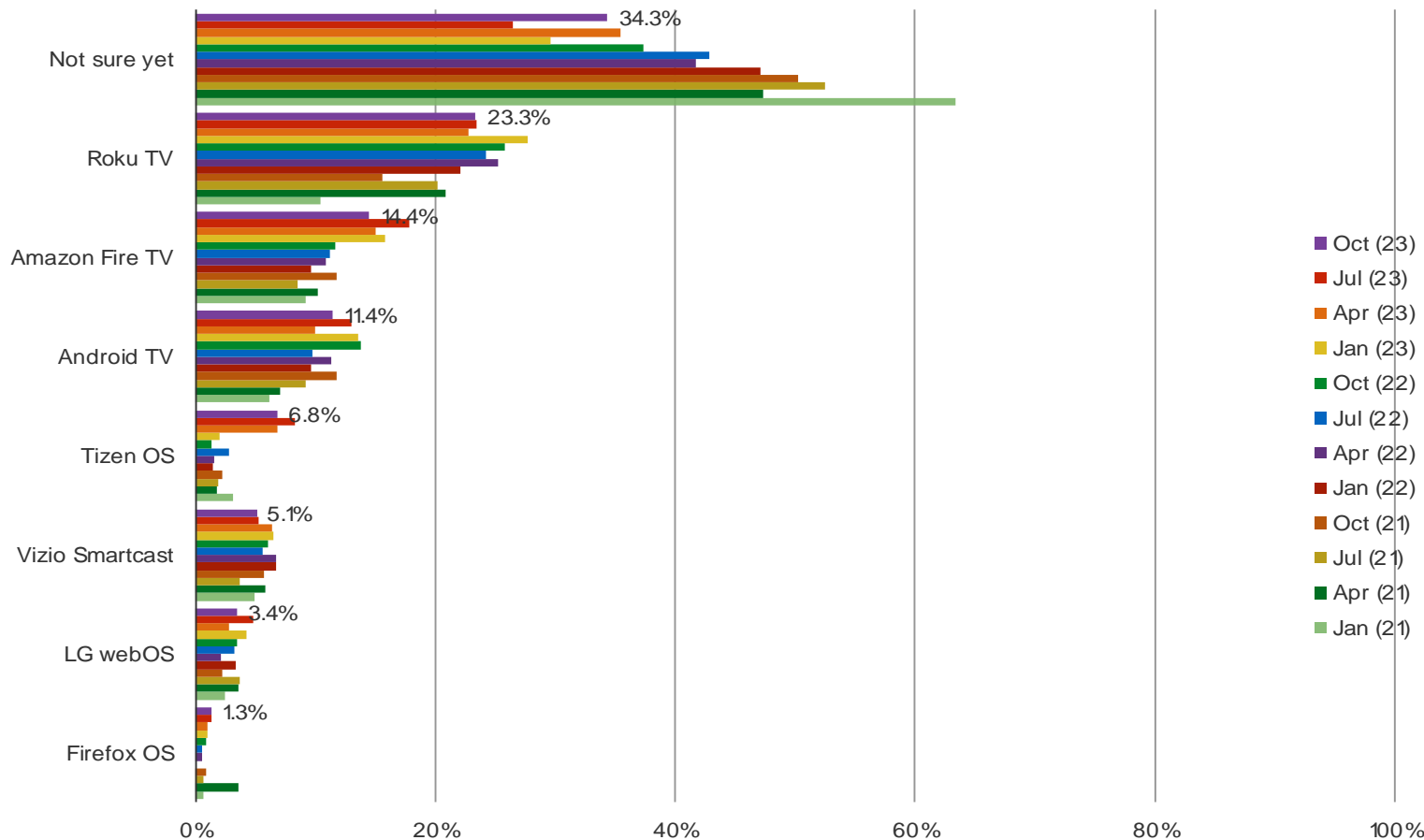
Posed to all respondents who have plans to purchase a smart TV in the next 12-18 months.



N = 238

WHICH SOFTWARE PLATFORM ARE YOU PLANNING TO GET?

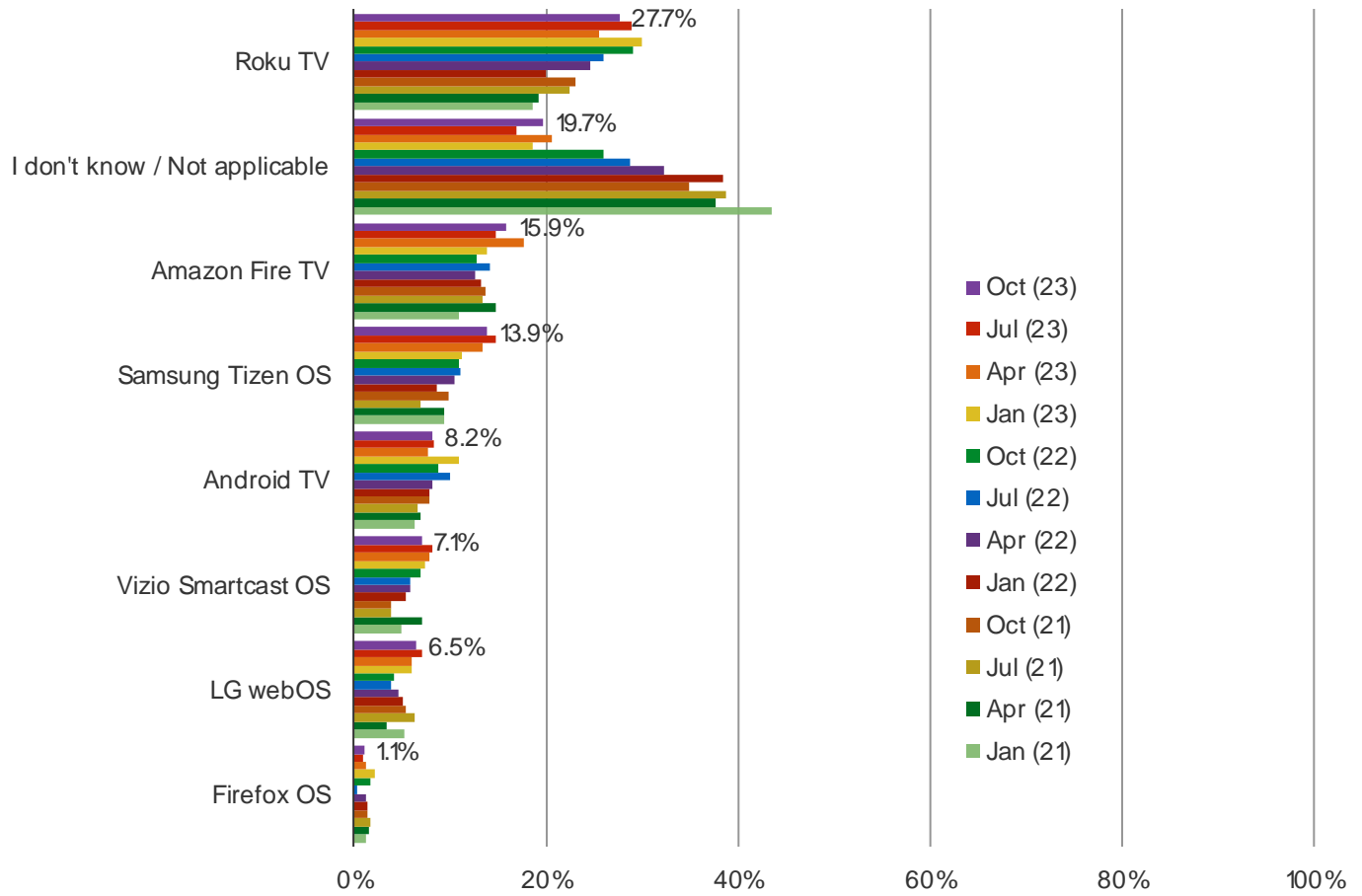
Posed to all respondents who have plans to purchase a smart TV in the next 12-18 months.



N = 238

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.

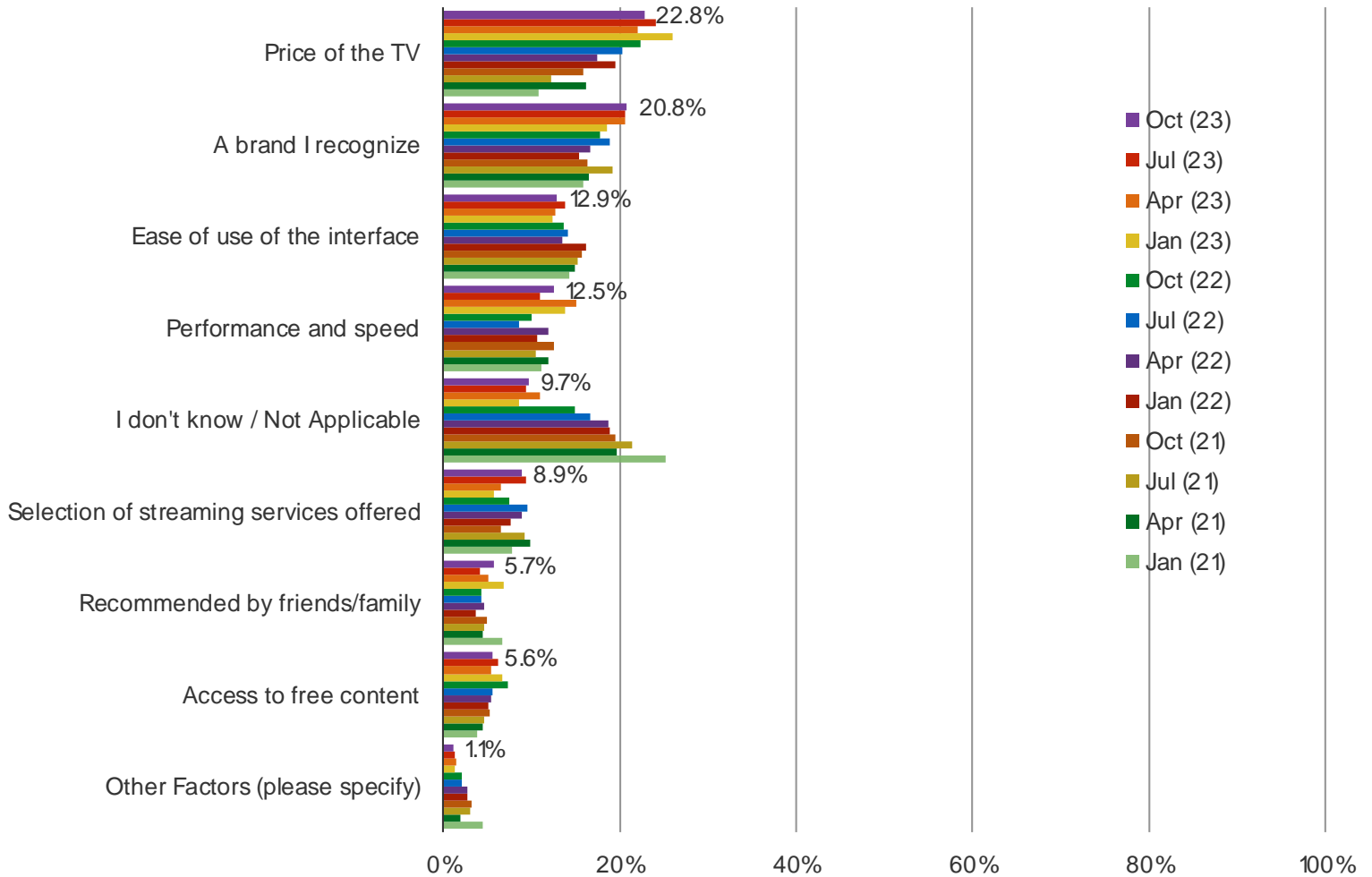


N = 653



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.

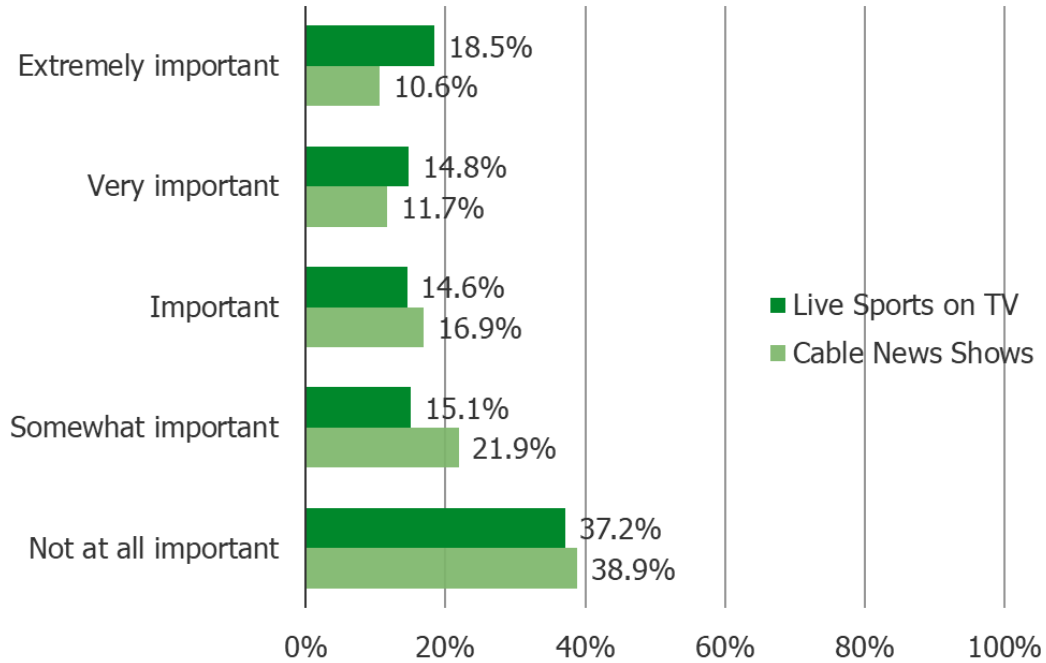


N = 636

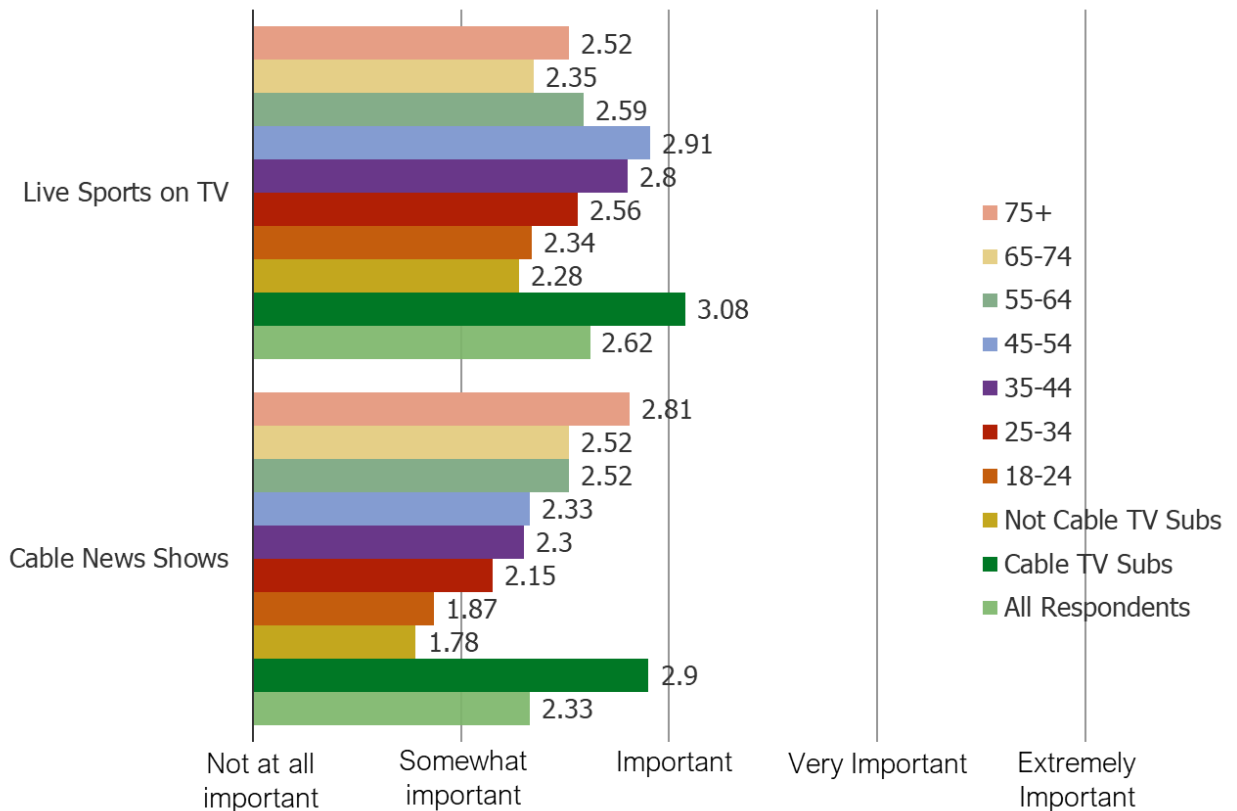
## CABLE TV PERSONALITIES AND LIVE SPORTS/EVENTS

HOW IMPORTANT ARE THE FOLLOWING TO YOU...

Posed to all respondents.

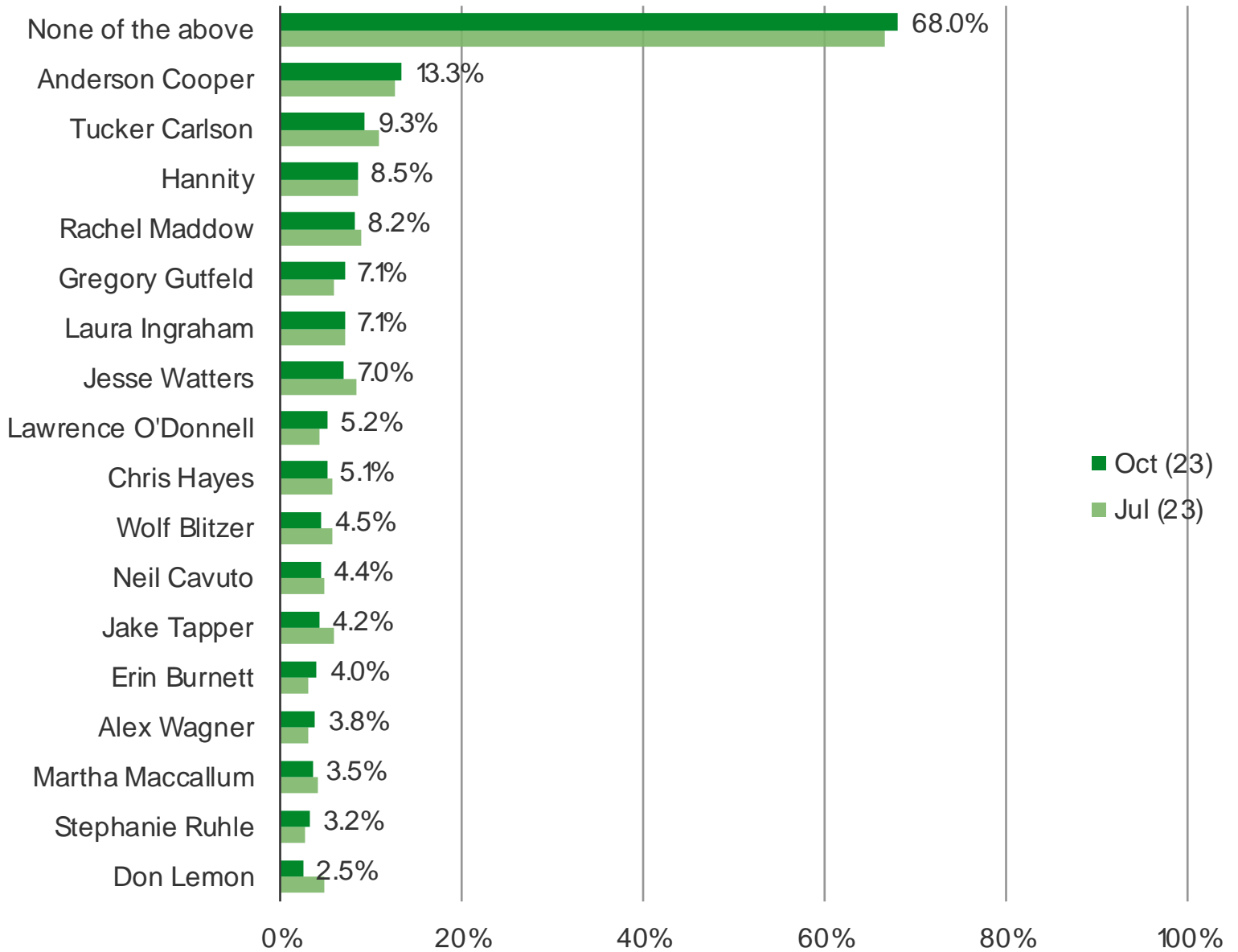


Cross-Tabs (Weighted Averages)



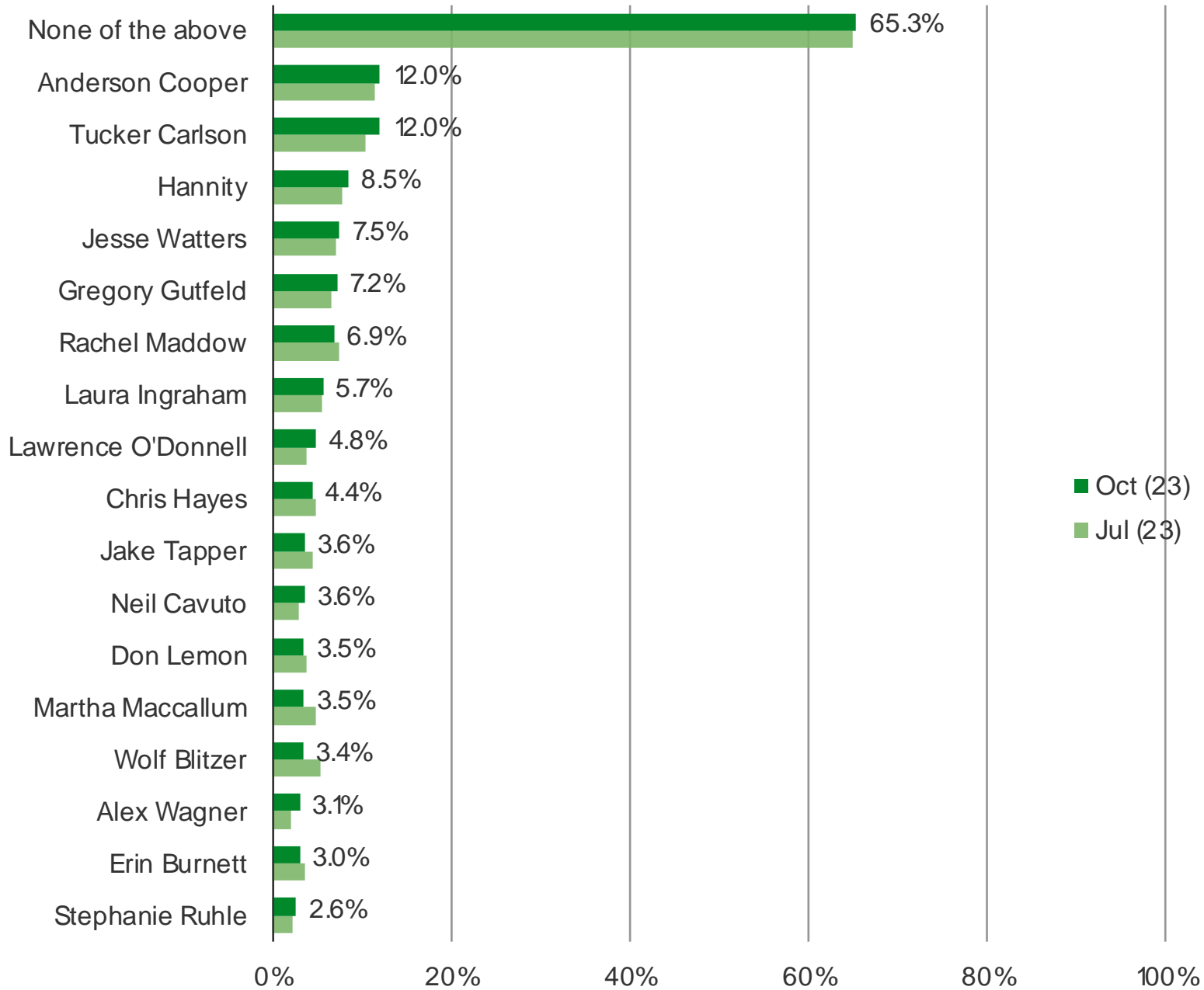
DO YOU WATCH ANY OF THE FOLLOWING REGULARLY? SELECT ALL THAT APPLY

Posed to all respondents.



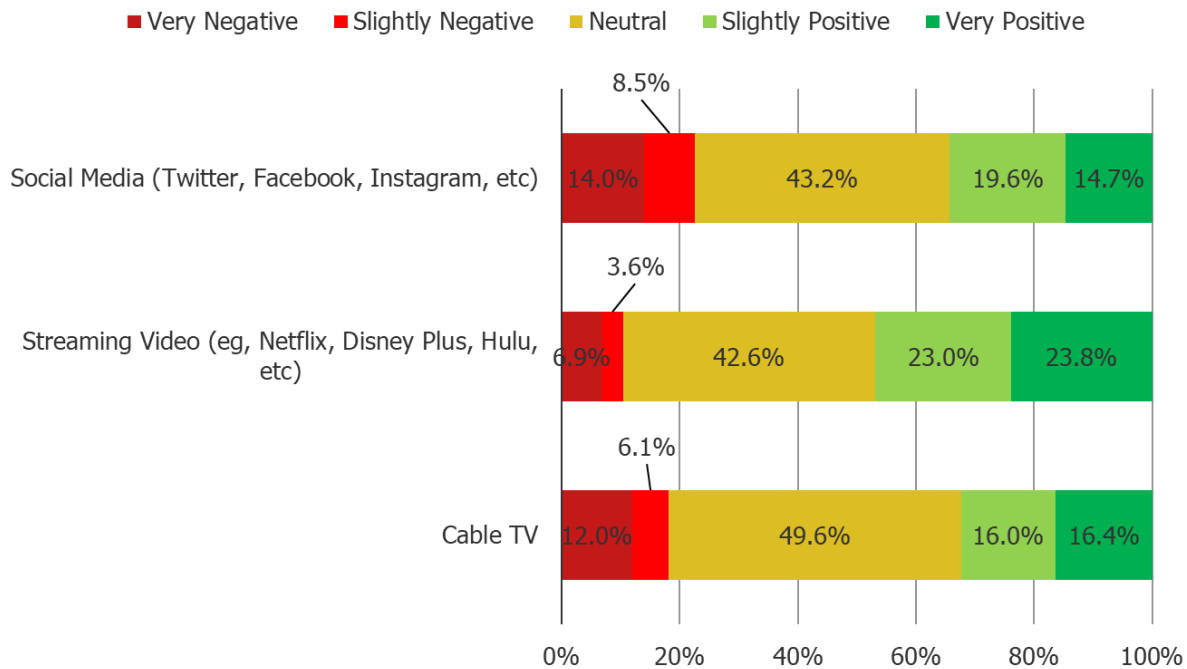
DO YOU CONSIDER YOURSELF A FAN OF ANY OF THE FOLLOWING? SELECT ALL THAT APPLY

Posed to all respondents.

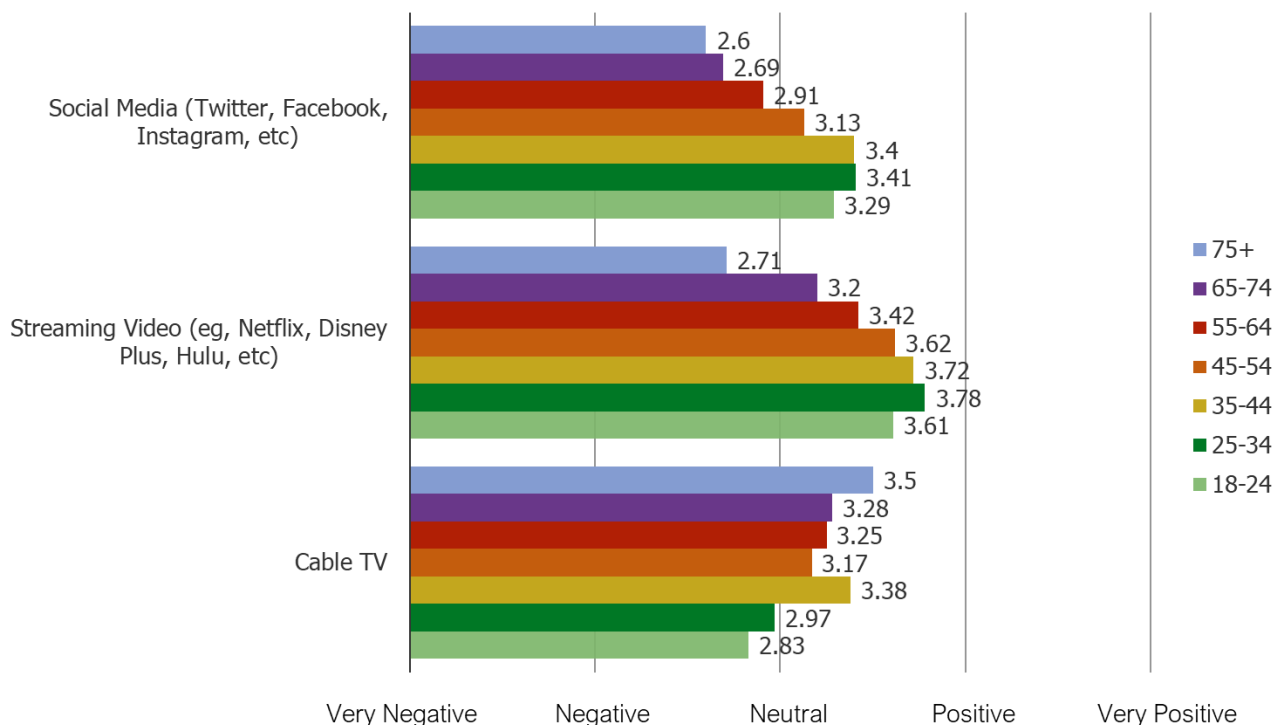


HOW DO YOU FEEL ABOUT WATCHING YOUR FAVORITE CABLE MEDIA PERSONALITIES ON THE FOLLOWING PLATFORMS?

Posed to all respondents.

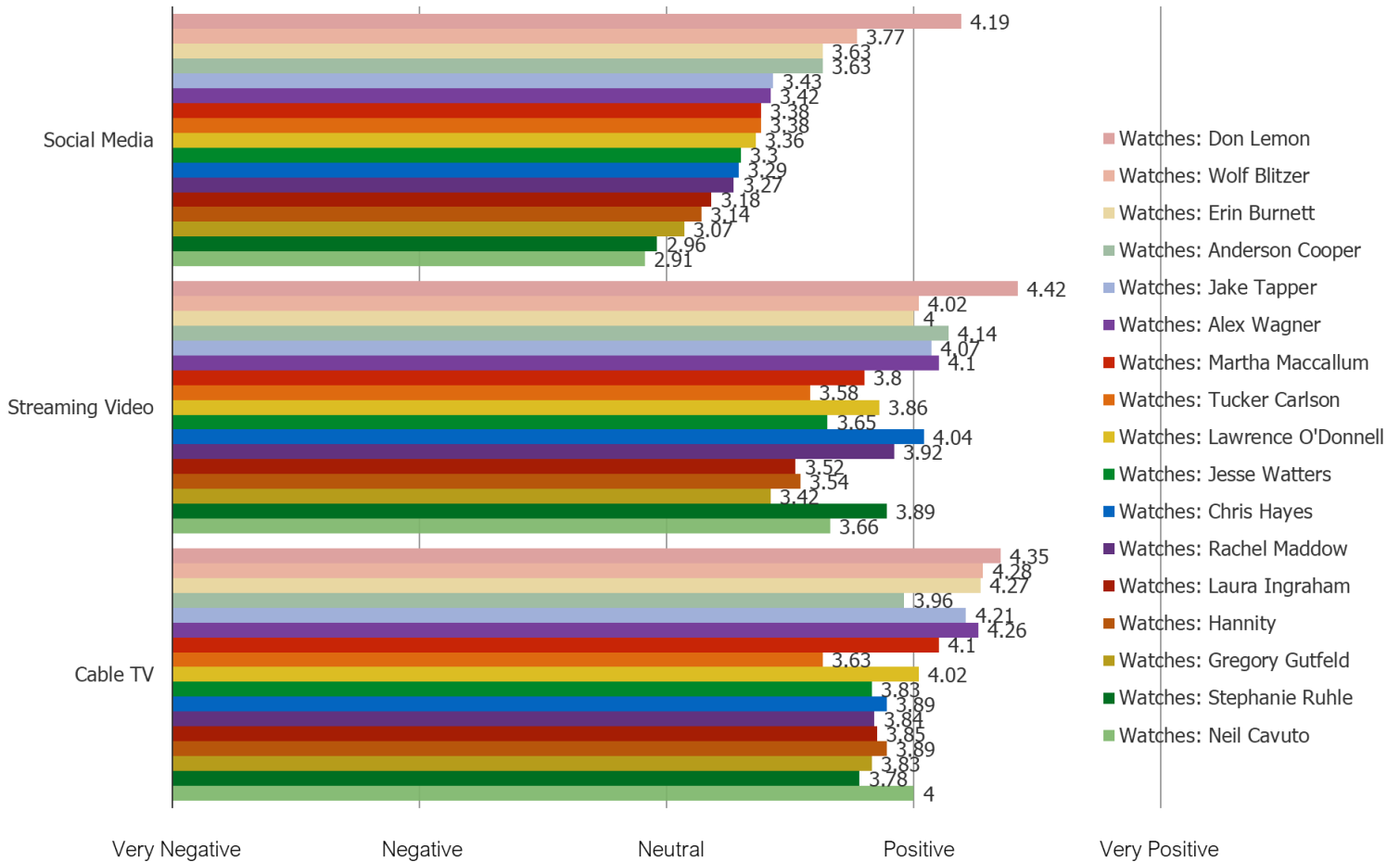


Cross-Tabs (Weighted Averages)



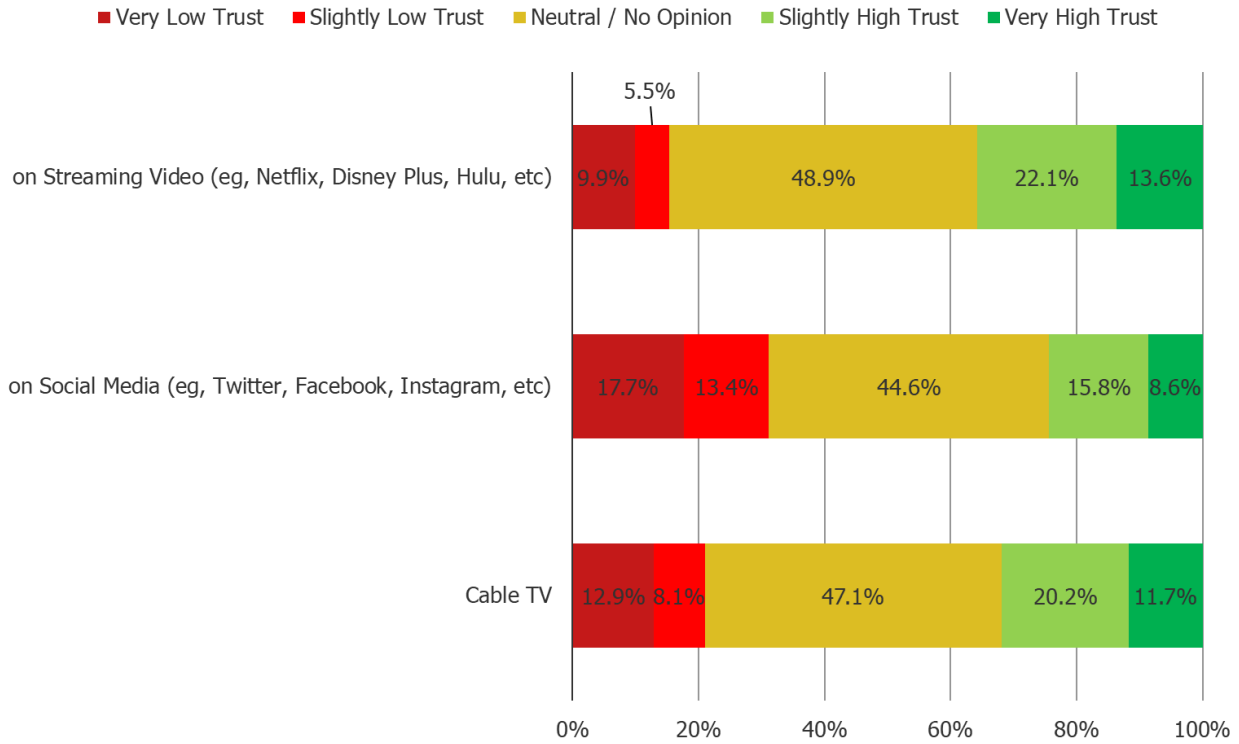
HOW DO YOU FEEL ABOUT WATCHING YOUR FAVORITE CABLE MEDIA PERSONALITIES ON THE FOLLOWING PLATFORMS?

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

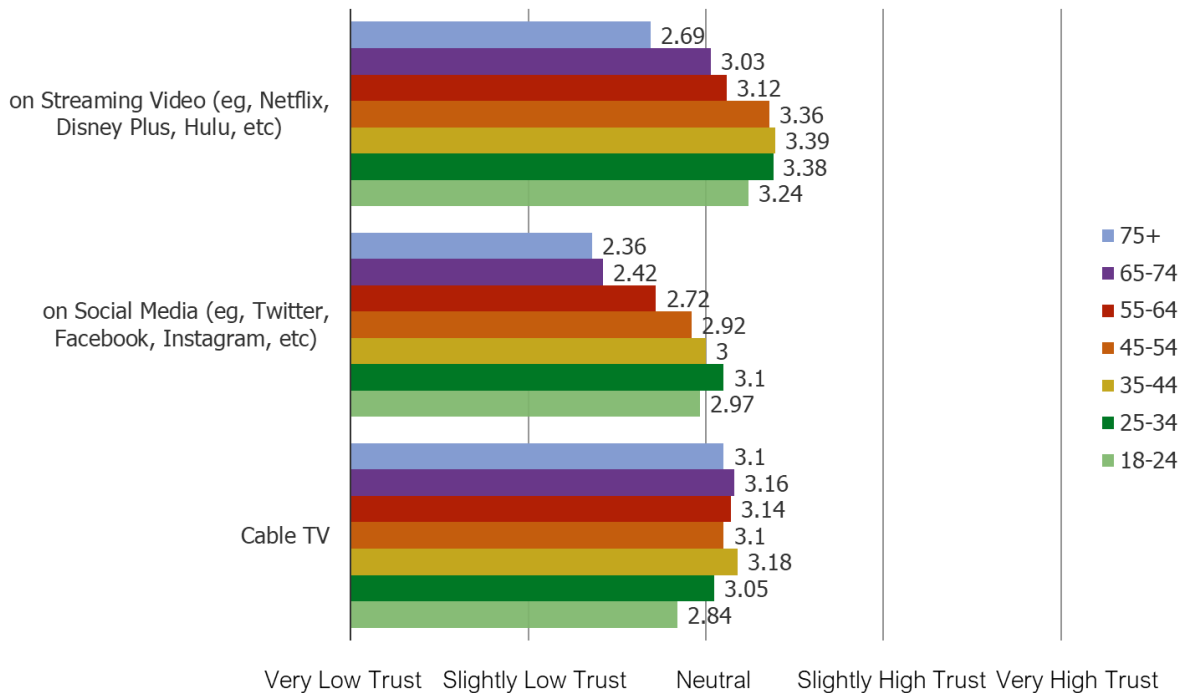


HOW MUCH TRUST DO YOU HAVE IN WATCHING VIDEO OF YOUR FAVORITE CABLE NEWS PERSONALITIES IN THE FOLLOWING FORUMS...

Posed to all respondents.



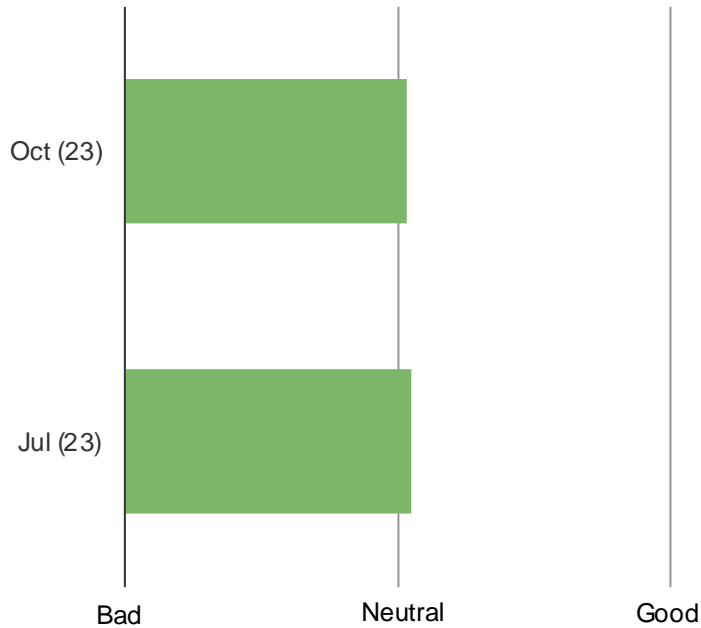
Cross-Tabs (Weighted Averages)





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)

