

# Bespoke Survey Research

January 2024

## Streaming Players Survey (Roku Deep Dive)

Volume 13 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: ROKU, AMZN, AAPL.

### Key Takeaways:

- ❑ The share of respondents who use smart TV's with built in streaming operating systems continues to increase sequentially and has grown over time.
- ❑ Roku remains the market share leader when it comes to dedicated streaming devices that consumers use. Roku leads Amazon Fire Stick and Apple TV.
- ❑ Consumers have a relatively strong level of connection to the Roku brand, on an absolute basis and relative to peers.
- ❑ The share of Roku users who watch the Roku channel has increased sequentially. Satisfaction with the Roku channel among those who watch it is very strong.
- ❑ Among respondents in the market for a new TV, price point and the brand remain the most important factors; however, the specific software platform has gained in importance over time.
- ❑ Consumer satisfaction with the Roku TV software interface remains high. Roku leads key competitors on this front.

### Noteworthy Stats:

**18.1%** of respondents who have a TV that uses the Roku OS or own a Roku streaming player watch the Roku channel very often.

**40.7%** of respondents use a dedicated streaming device to watch streaming video.

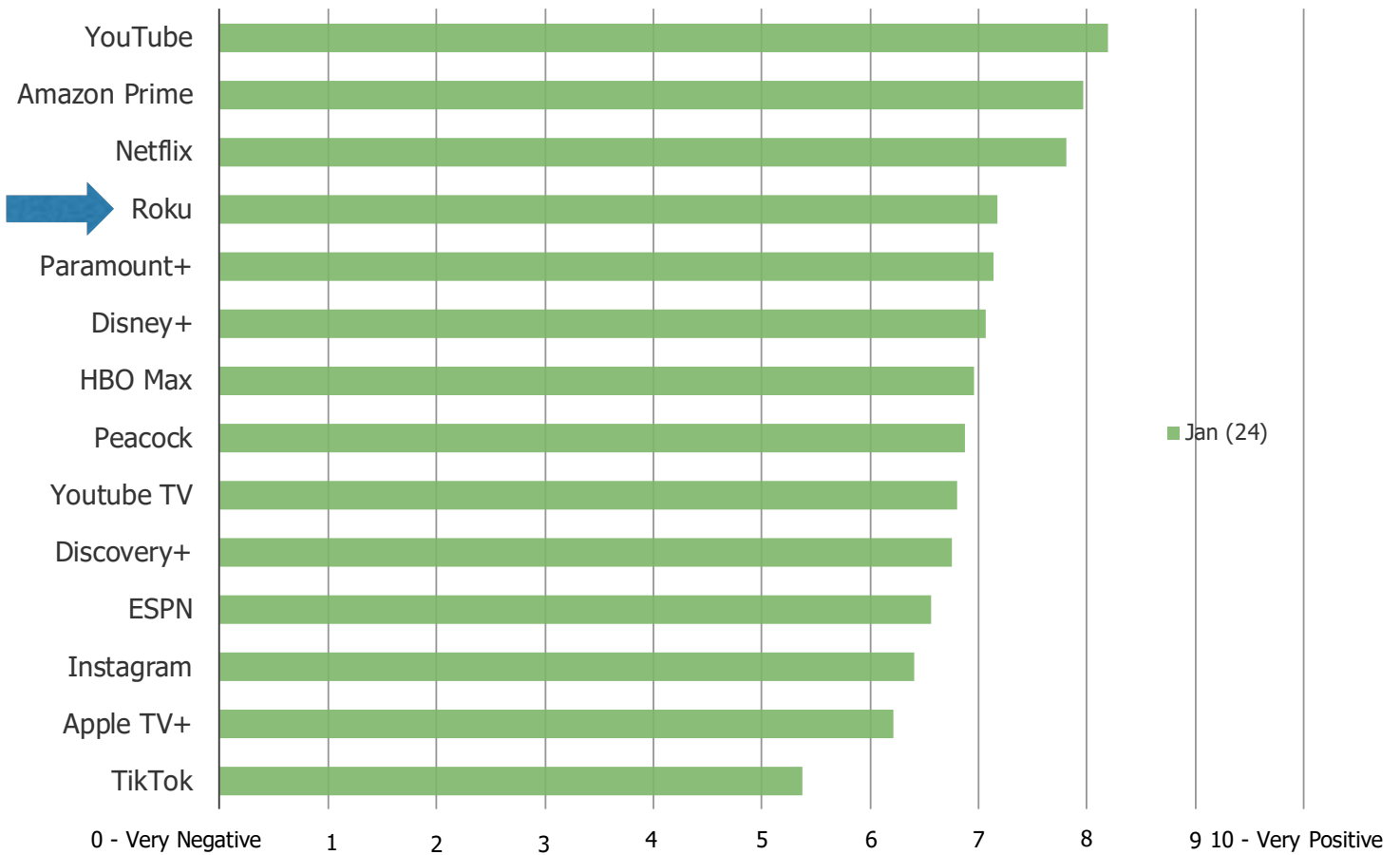
**32.2%** of TCL owners said they bought a TCL TV primarily because it had Roku TV on it.

**25.0%** 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

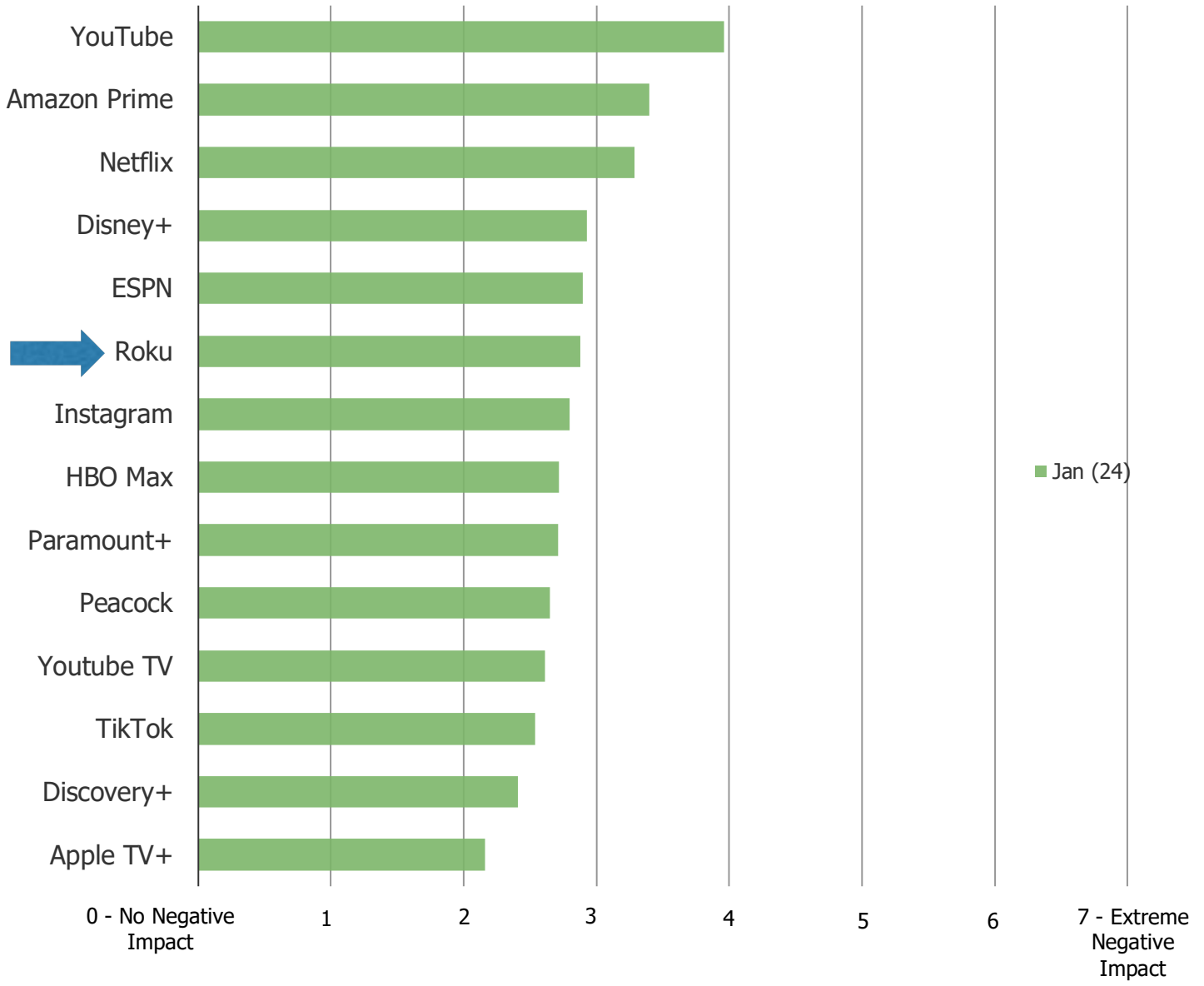
HOW DO YOU FEEL ABOUT THE FOLLOWING BRANDS?

Posed to respondents who are aware of each the below.



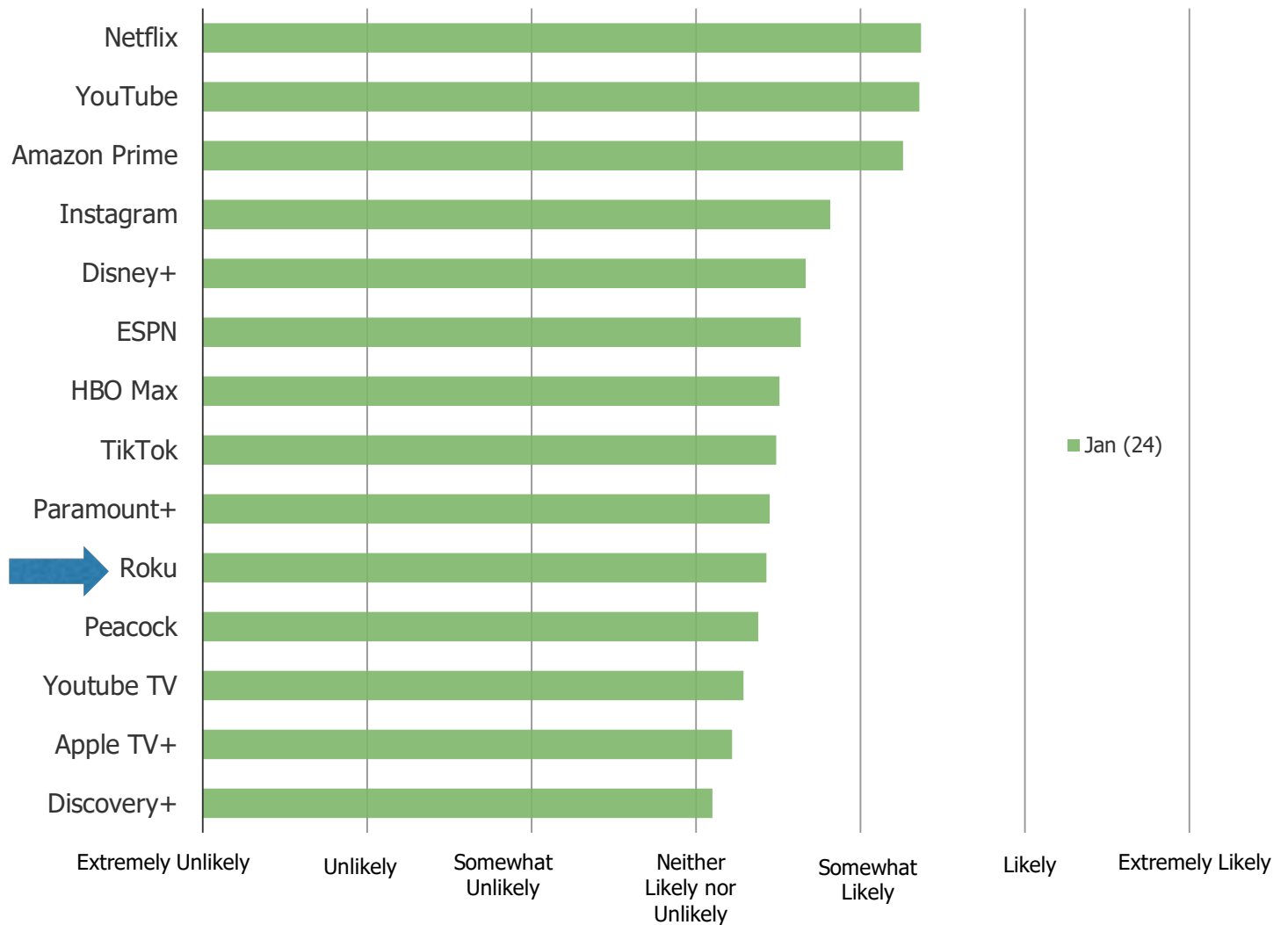
WHAT KIND OF AN IMPACT WOULD THERE BE ON YOUR LIFE IF THE FOLLOWING WENT OUT OF EXISTENCE TODAY?

Posed to respondents who are aware of each the below.



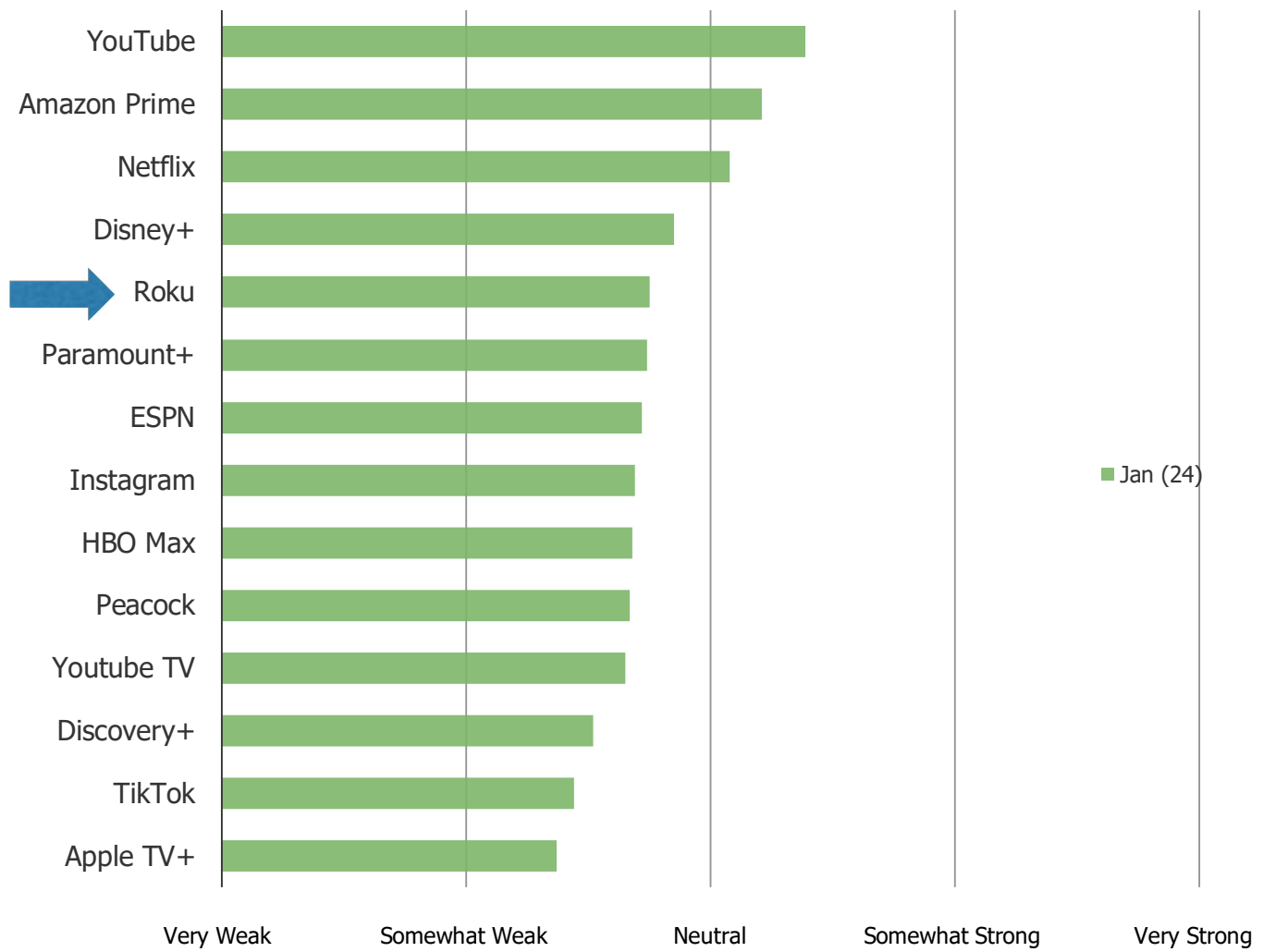
HOW LIKELY ARE YOUR FRIENDS/PEERS TO BE USERS OF THE FOLLOWING?

Posed to respondents who are aware of each the below.



HOW MUCH OF A PERSONAL CONNECTION DO YOU FEEL WITH THE FOLLOWING BRANDS/COMPANIES?

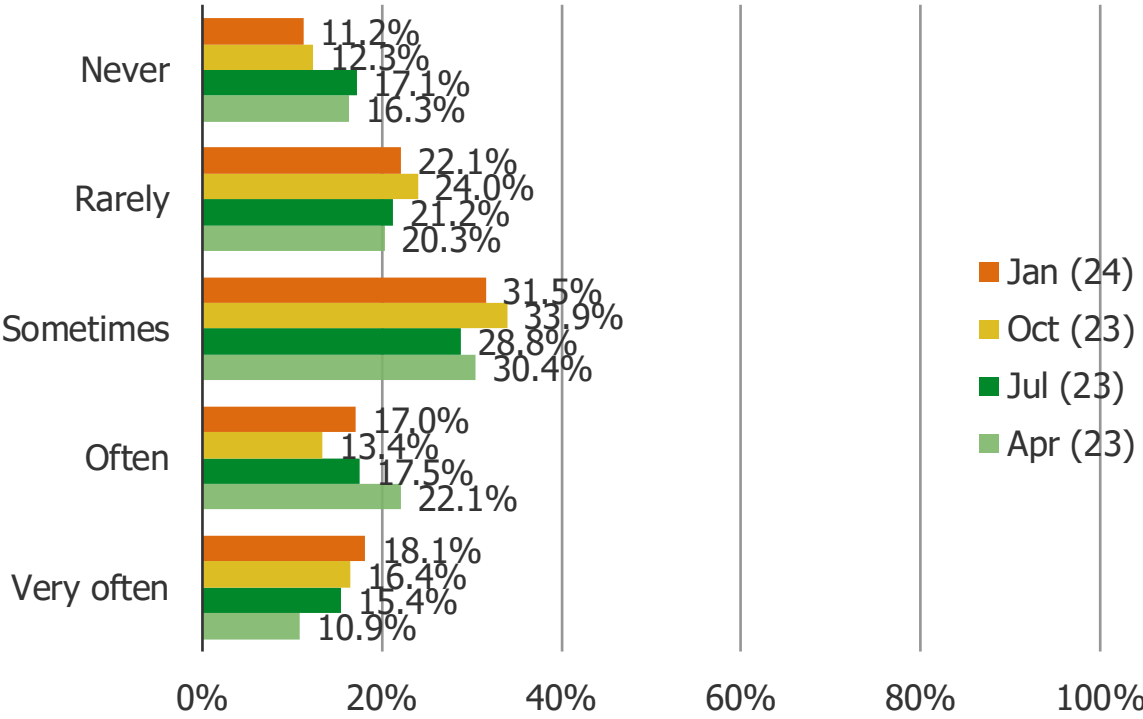
Posed to respondents who are aware of each the below.



# ROKU CHANNEL AND A TV MANUFACTURED BY ROKU

HOW OFTEN DO YOU WATCH THE ROKU CHANNEL?

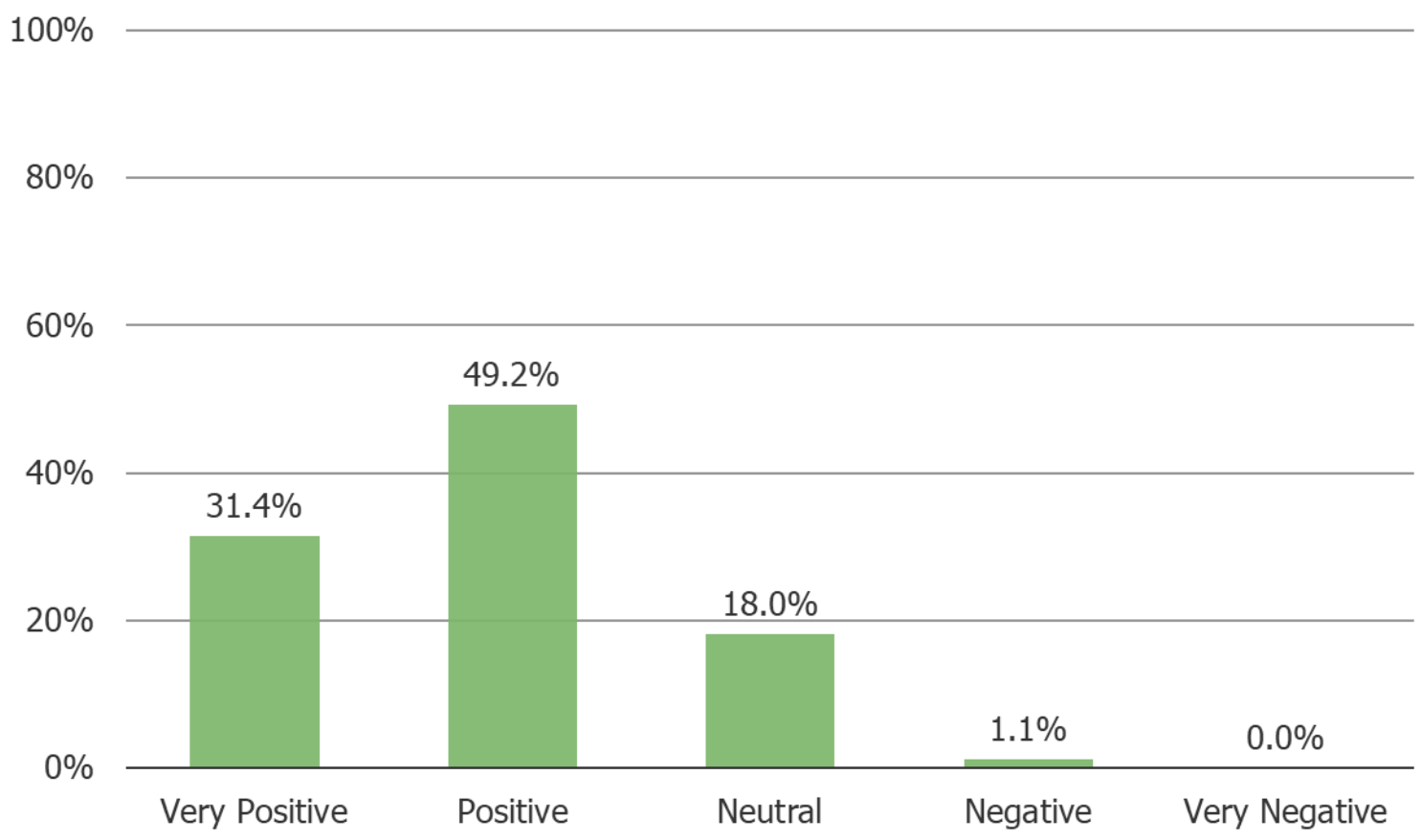
Posed to respondents who have a TV that uses the Roku OS or owns a Roku streaming player (N = 276).





WHAT IS YOUR OPINION OF THE ROKU CHANNEL?

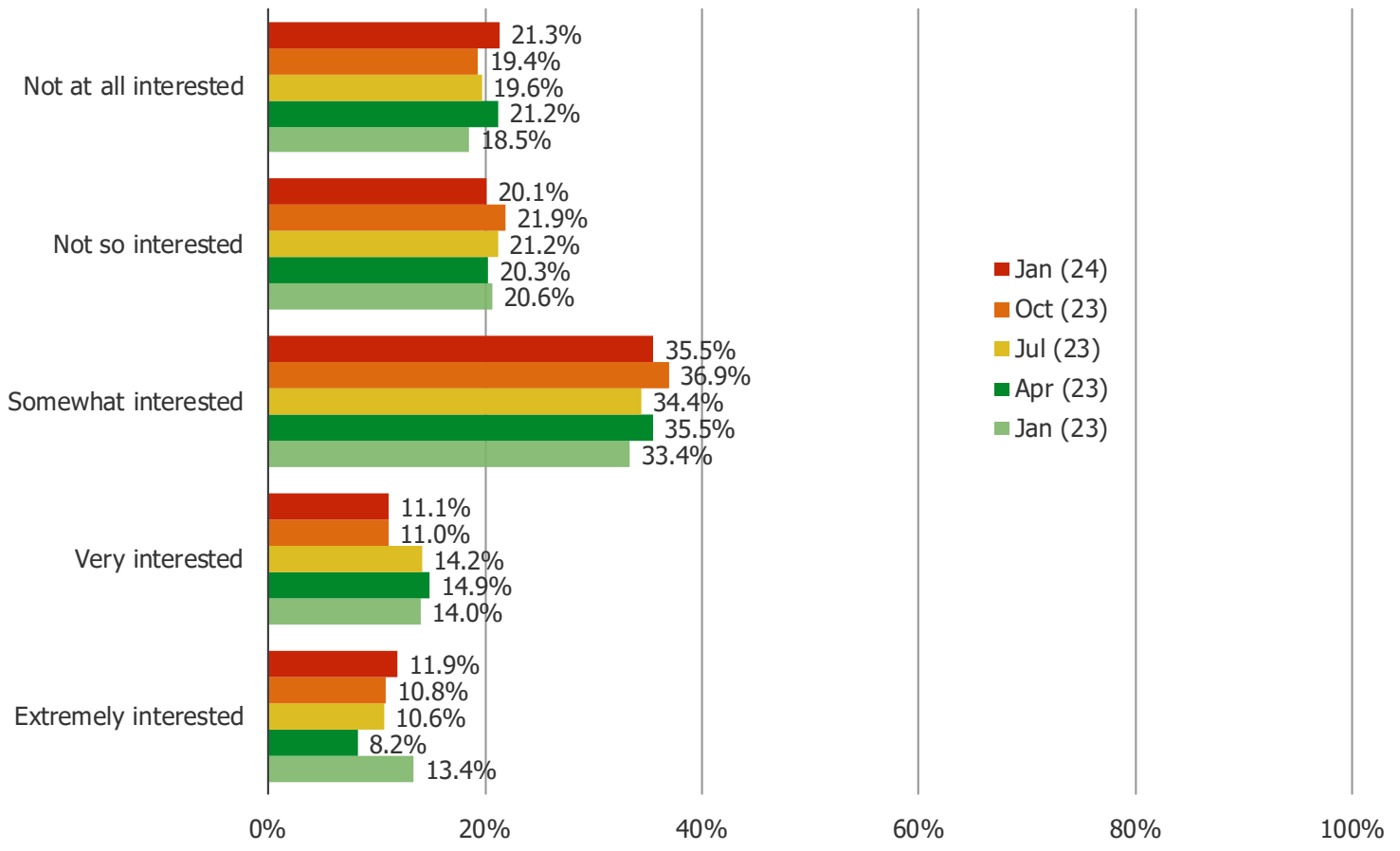
Posed to Roku users who watch the Roku Channel sometimes, often, or very often.



Combining the last 5 waves to reach a larger N Size (N = 726)

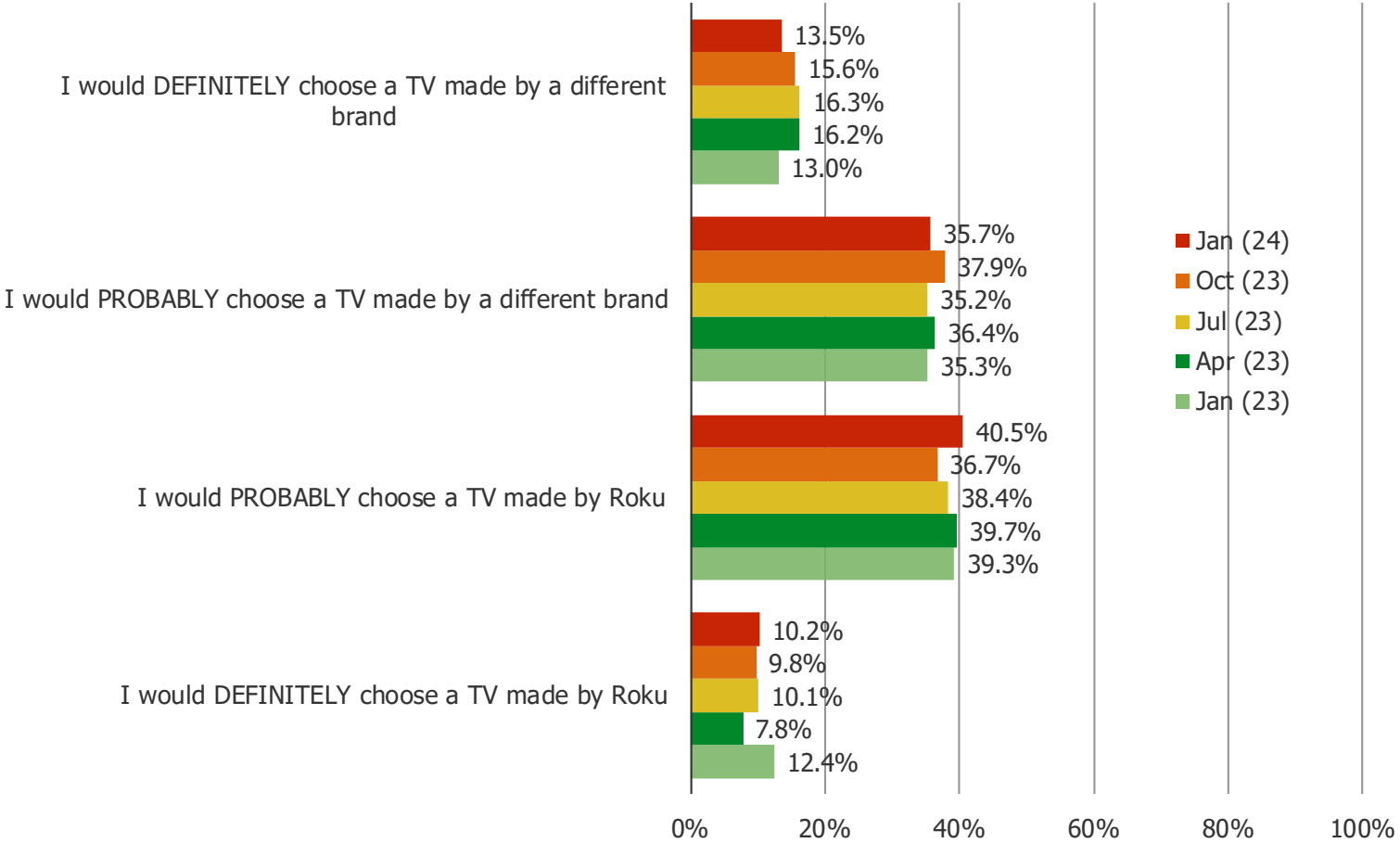
HOW INTERESTED WOULD YOU BE IN GETTING A TV THAT WAS ACTUALLY MANUFACTURED BY ROKU?

Posed to all respondents.



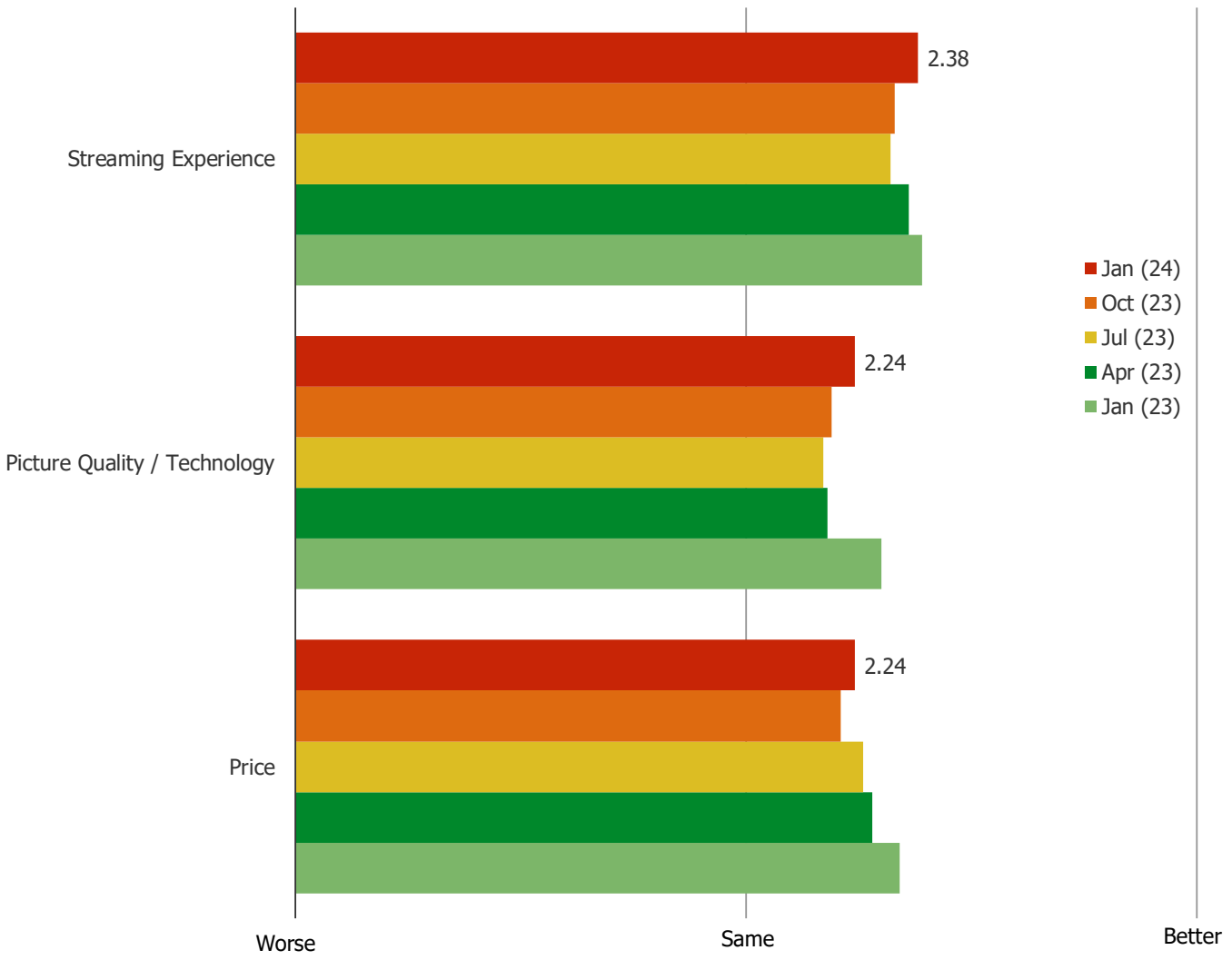
**HOW LIKELY WOULD YOU BE TO BUY A TV THAT WAS MANUFACTURED BY ROKU WHEN YOU ARE BUYING YOUR NEXT TV?**

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...

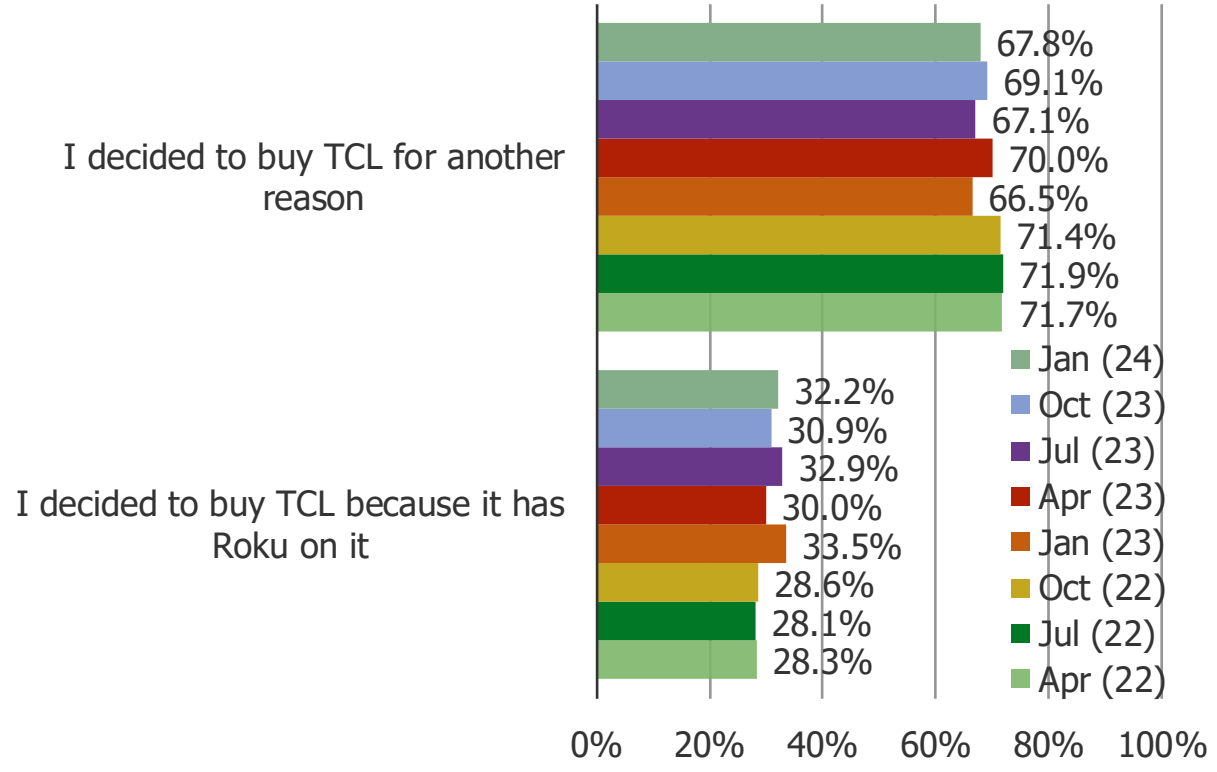
Posed to all respondents.



## MORE ROKU AND TV QUESTIONS

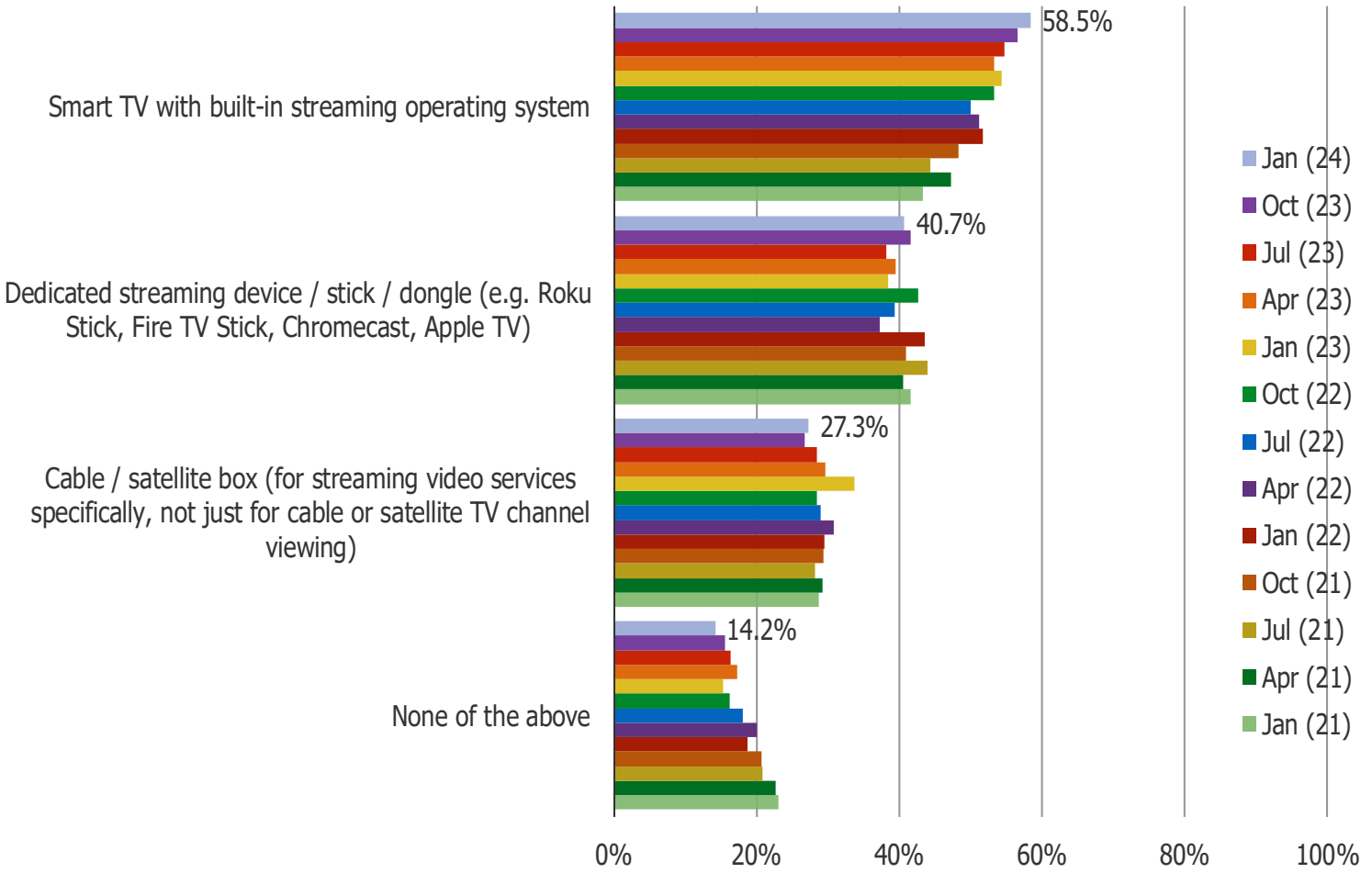
THINKING ABOUT YOUR TCL TV, WHICH OF THE FOLLOWING DESCRIBES YOU...

Posed to all respondents who have a TCL TV.



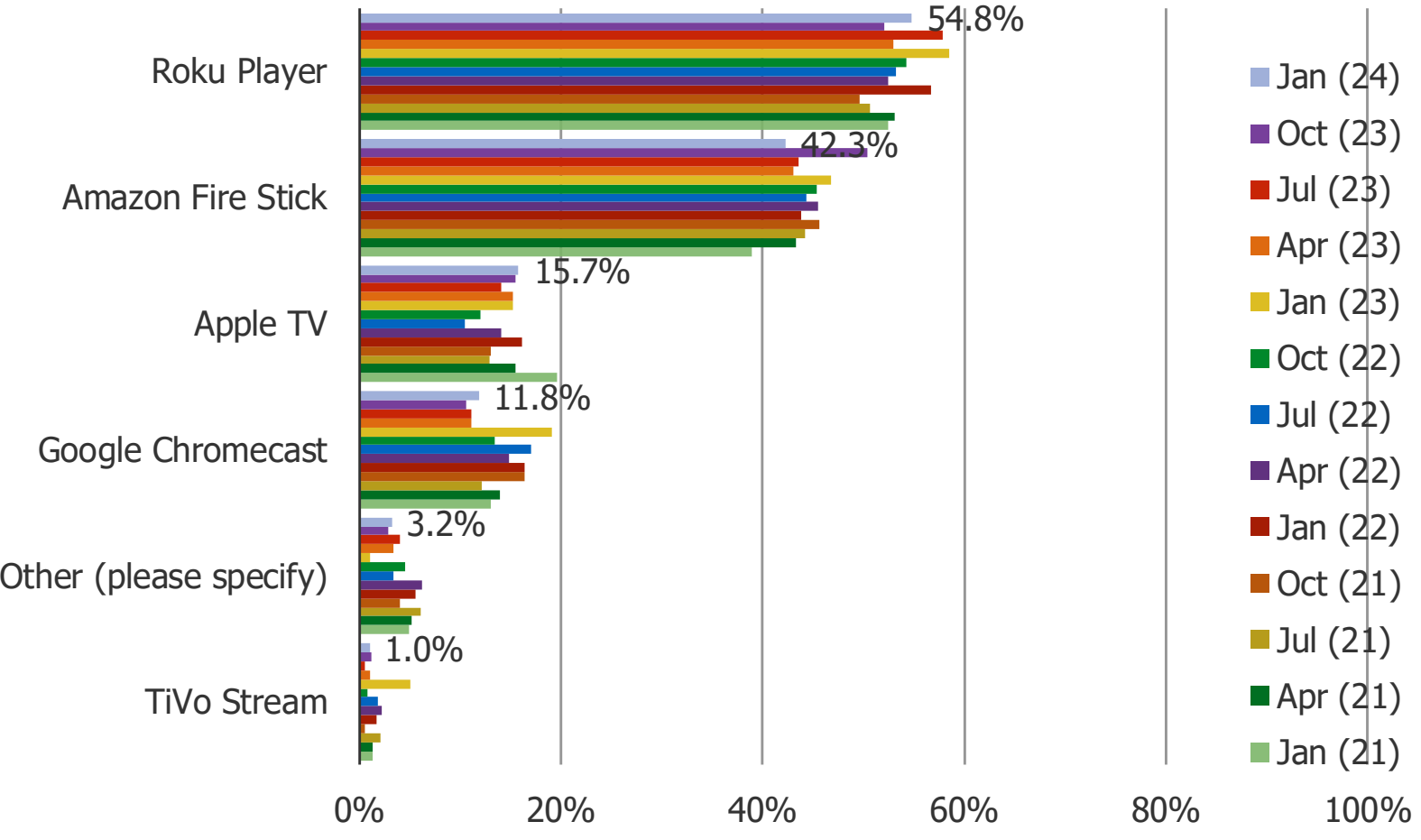
**WHAT HARDWARE DO YOU USE TO WATCH STREAMING VIDEO ON YOUR TV? (SELECT ALL THAT APPLY)**

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.

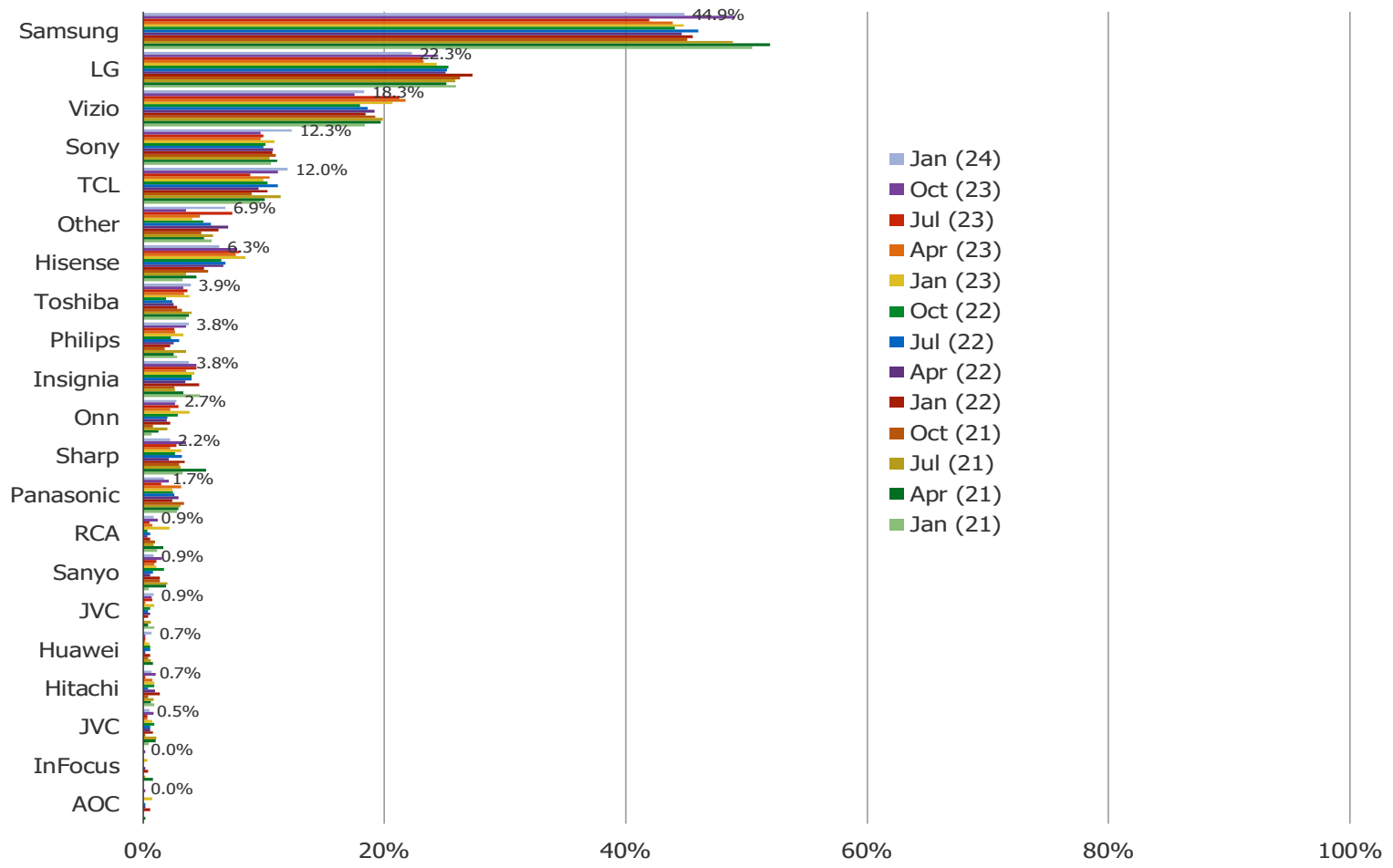


N = 407



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

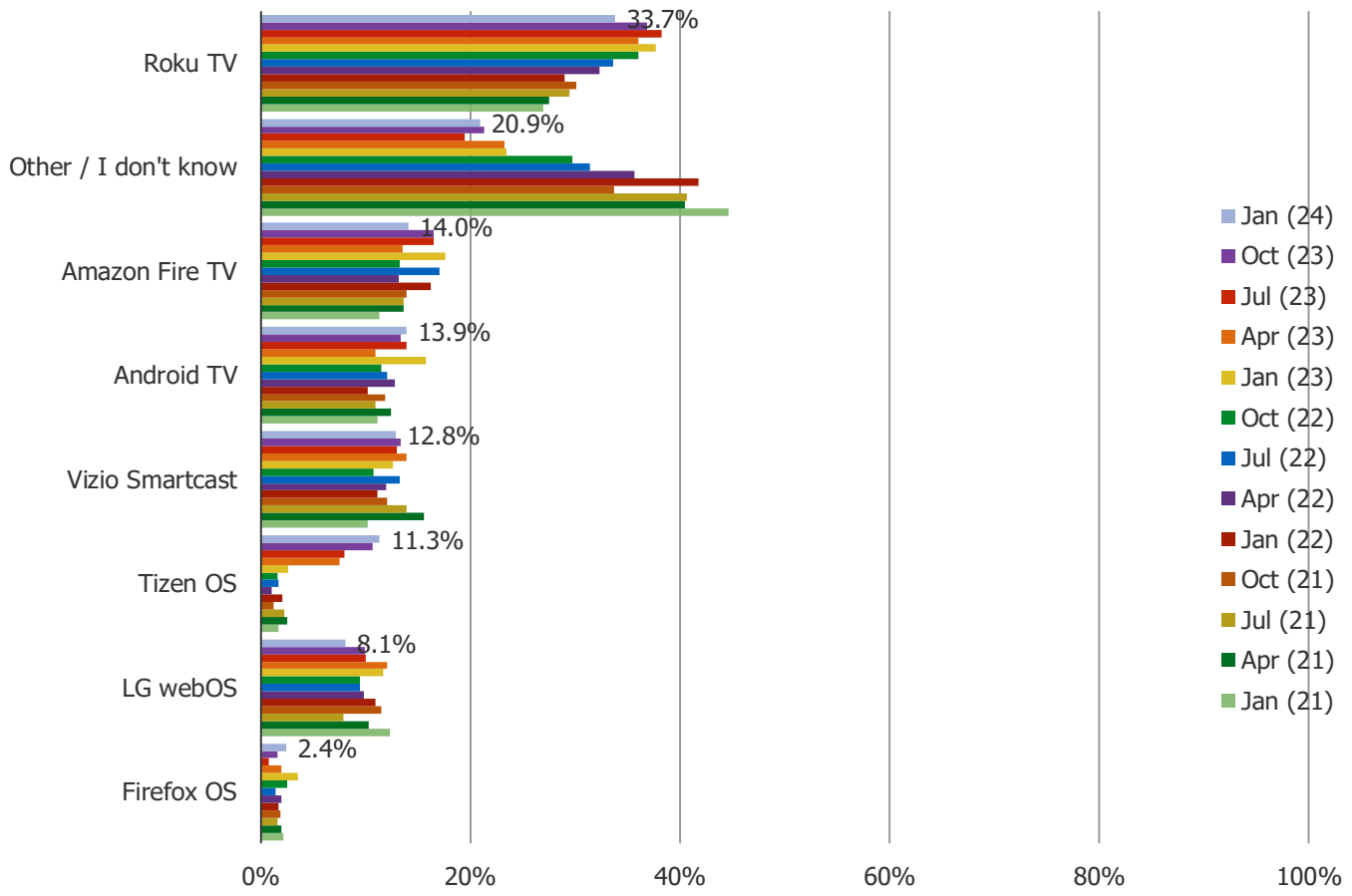
Posed to all respondents who own a smart TV.



N = 584

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

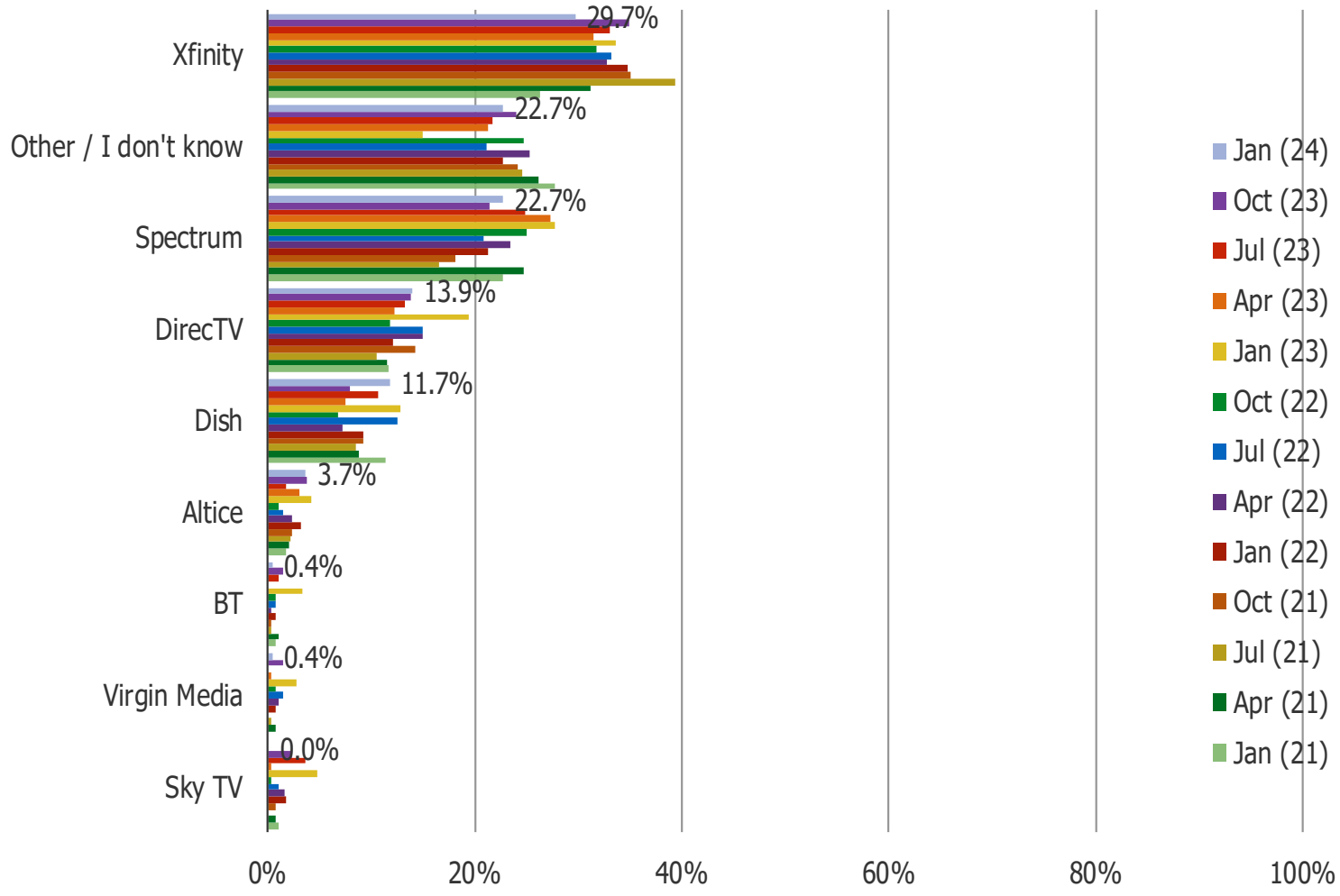
Posed to all respondents who own a smart TV.



N = 584

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

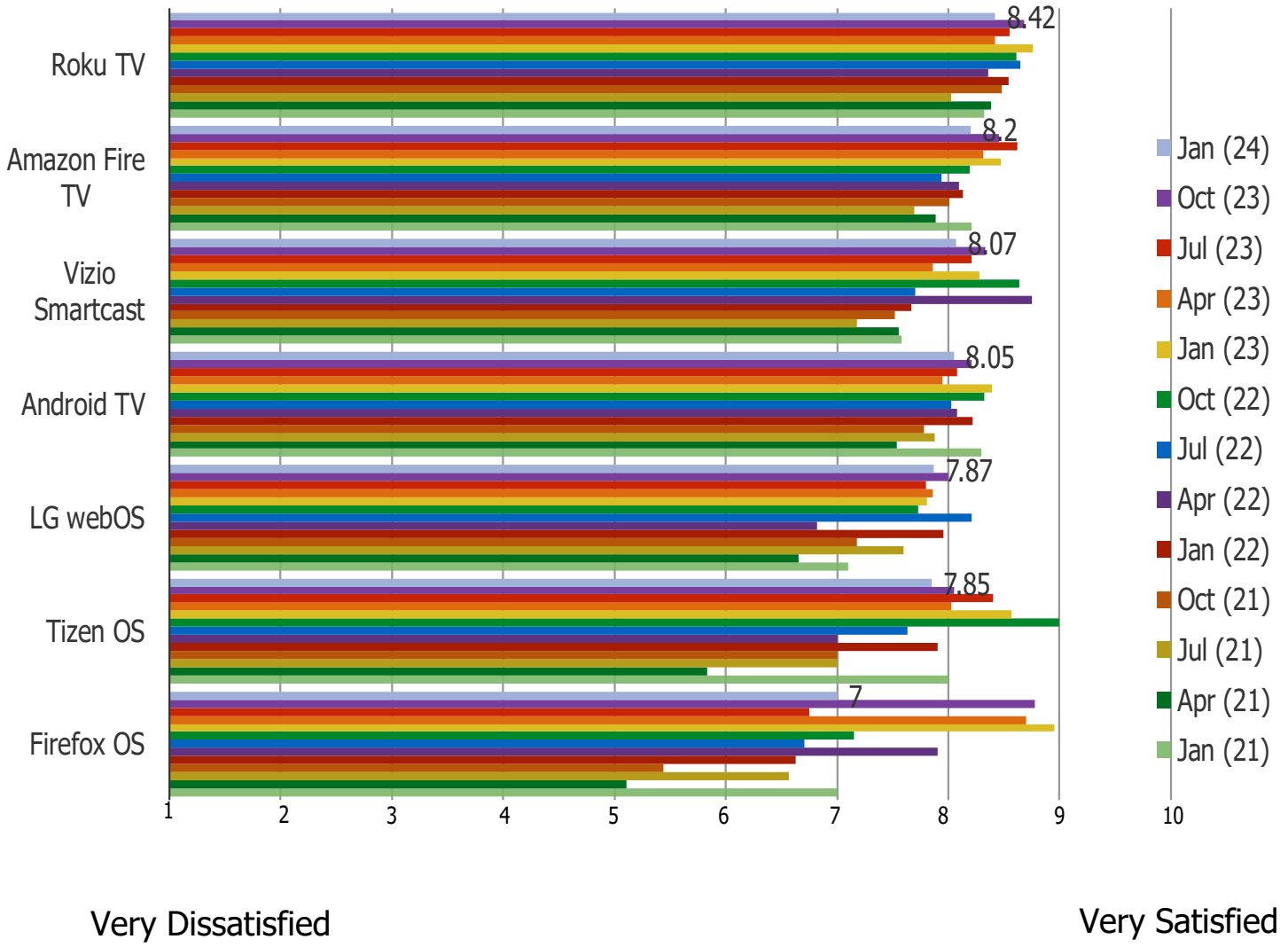
Posed to all respondents who use streaming devices.



N = 273

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

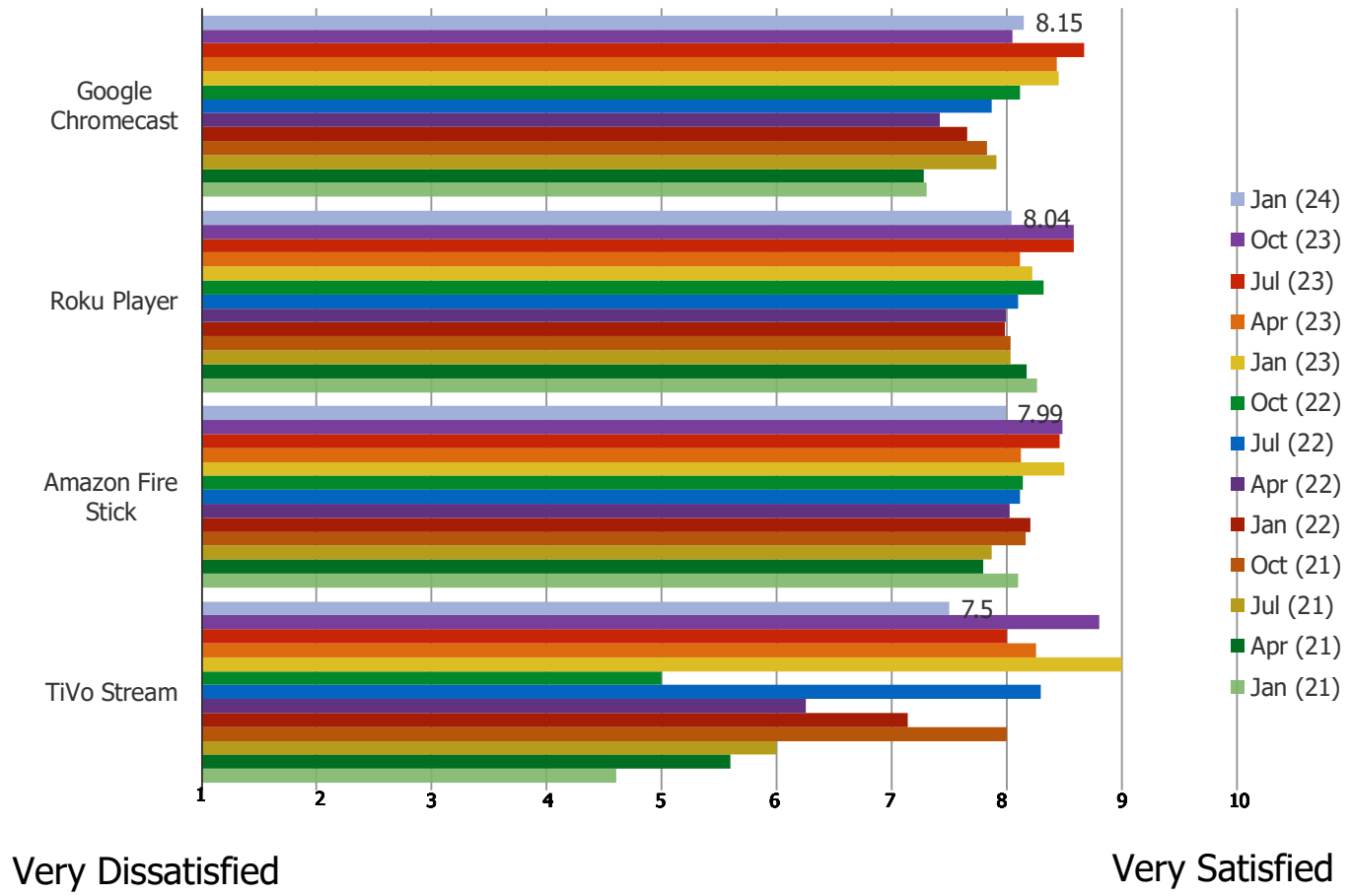
Posed to all respondents who own a smart TV and use each of the following.



	N=
Roku TV	197
Google TV or Android TV	81
Amazon Fire TV	82
Tizen OS (Samsung)	66
Vizio Smartcast	75
Firefox OS	14
LG webOS	47

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

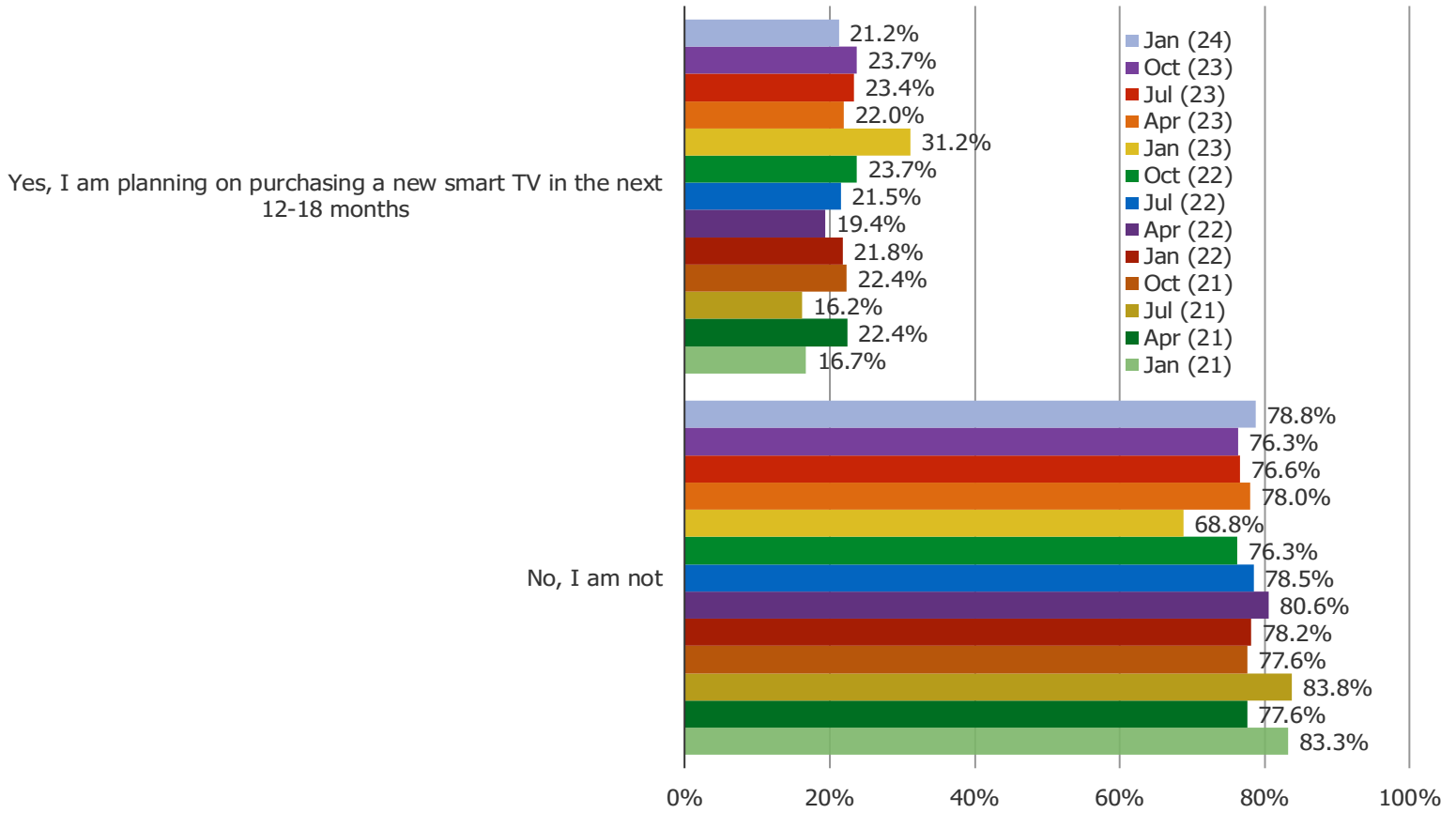
Posed to all respondents who own a smart TV and use each of the following.



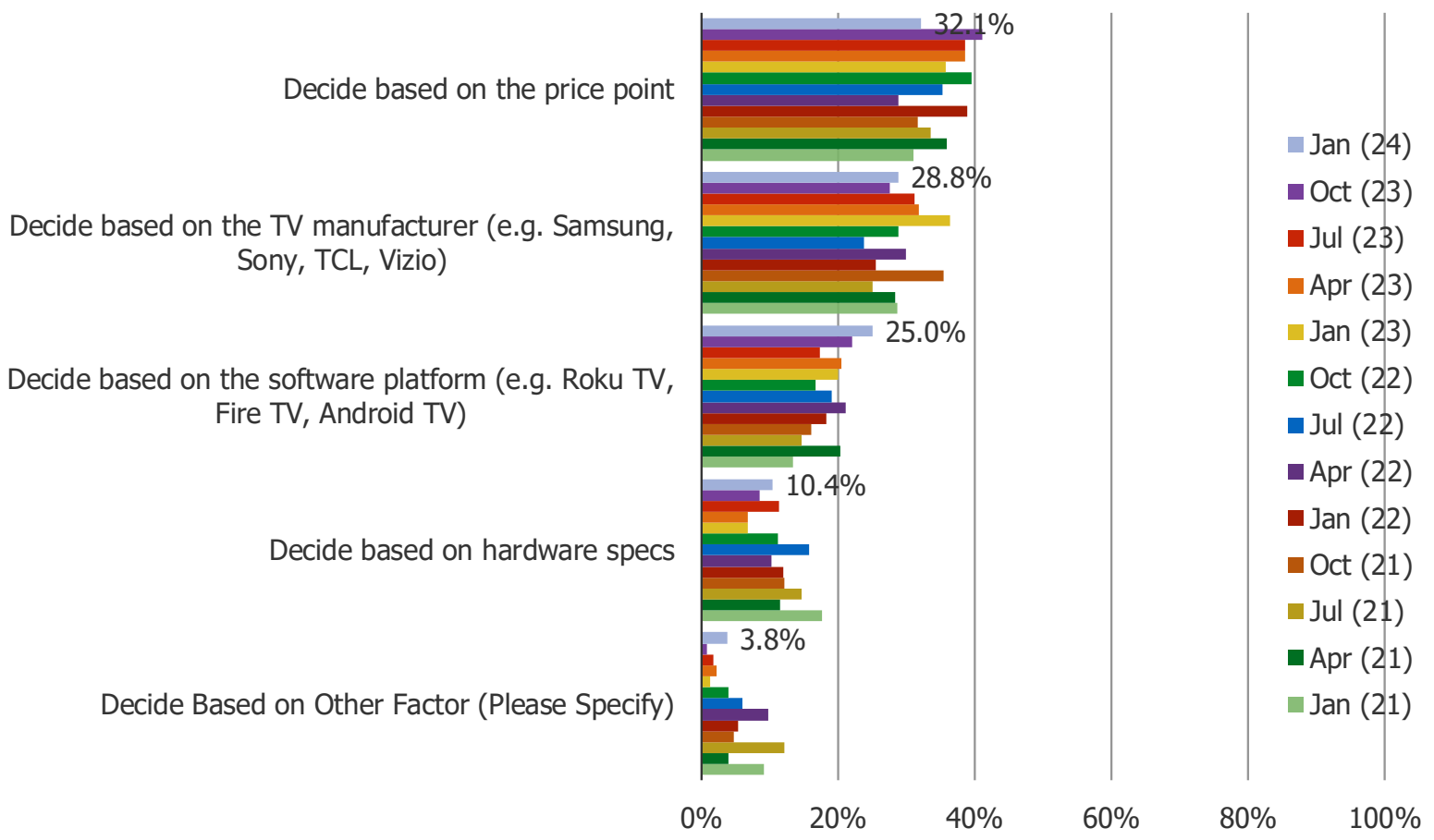
	N=
Apple TV	64
Roku Player	223
Amazon Fire Stick	172
Google Chromecast	48
TiVo Stream	4

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

Posed to all respondents.



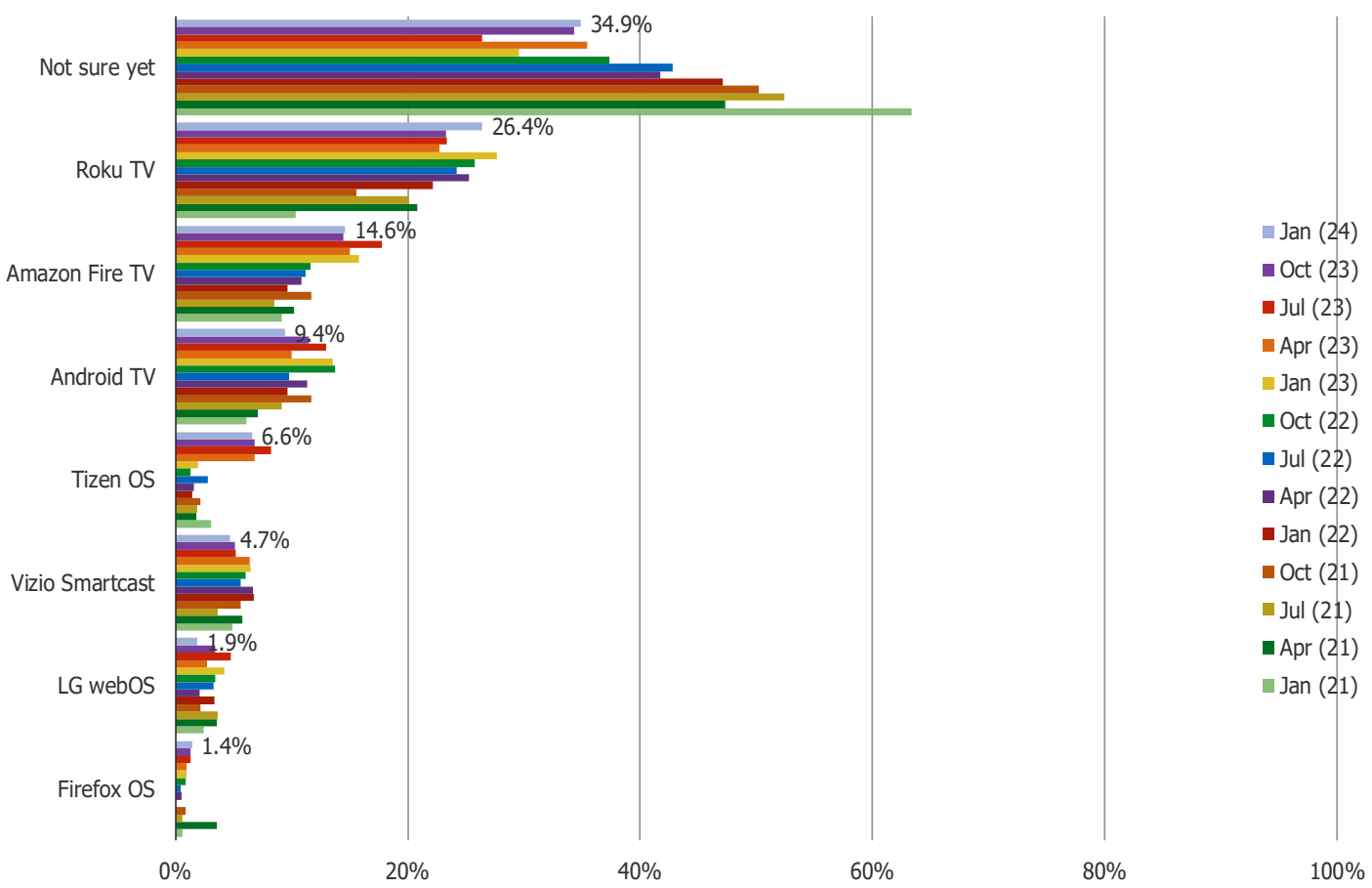
WHAT IS THE PRIMARY FACTOR THAT WILL DETERMINE WHICH TV YOU BUY?  
 Posed to all respondents who have plans to purchase a smart TV in the next 12-18 months.



N = 212

**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.

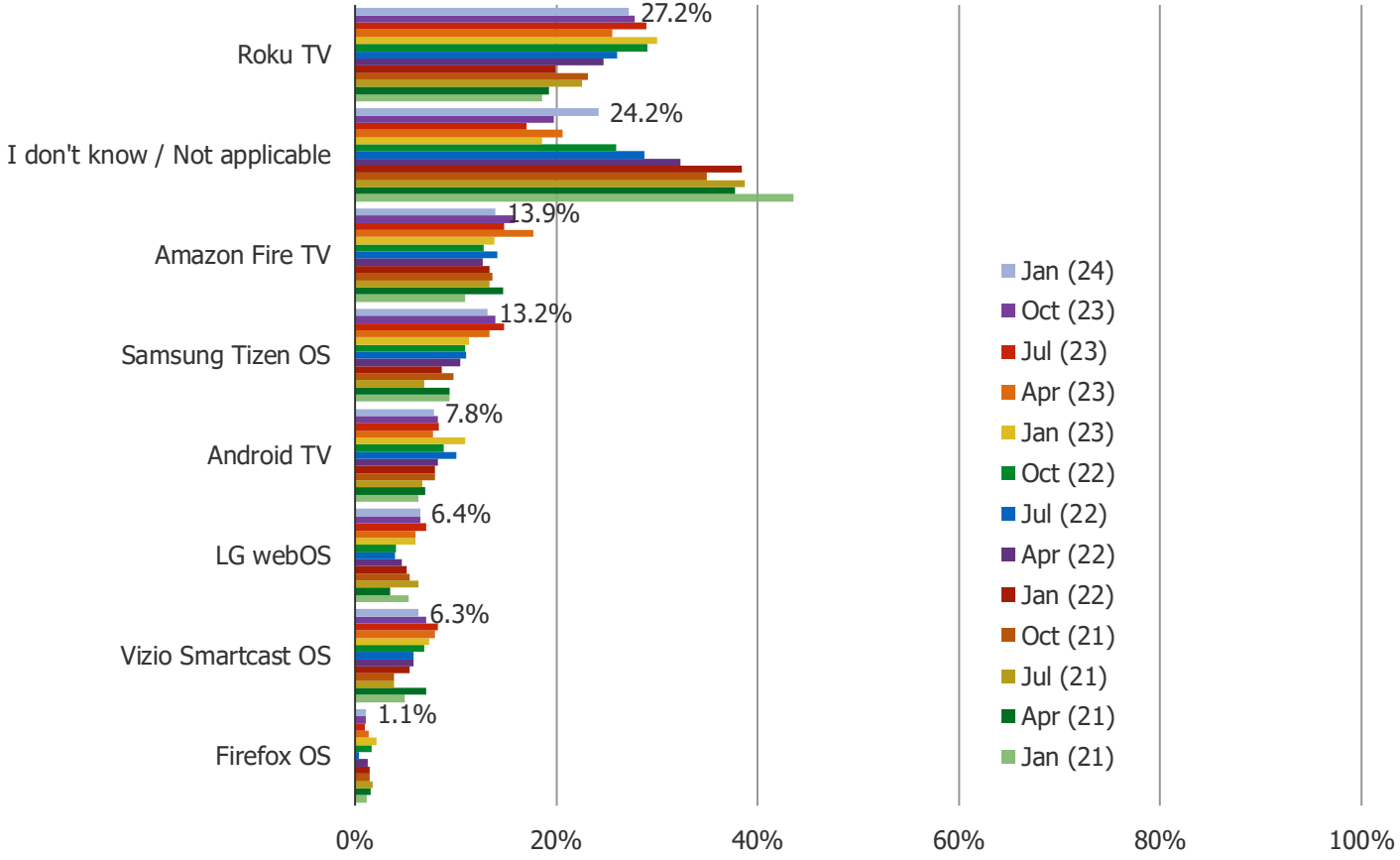


N = 212



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

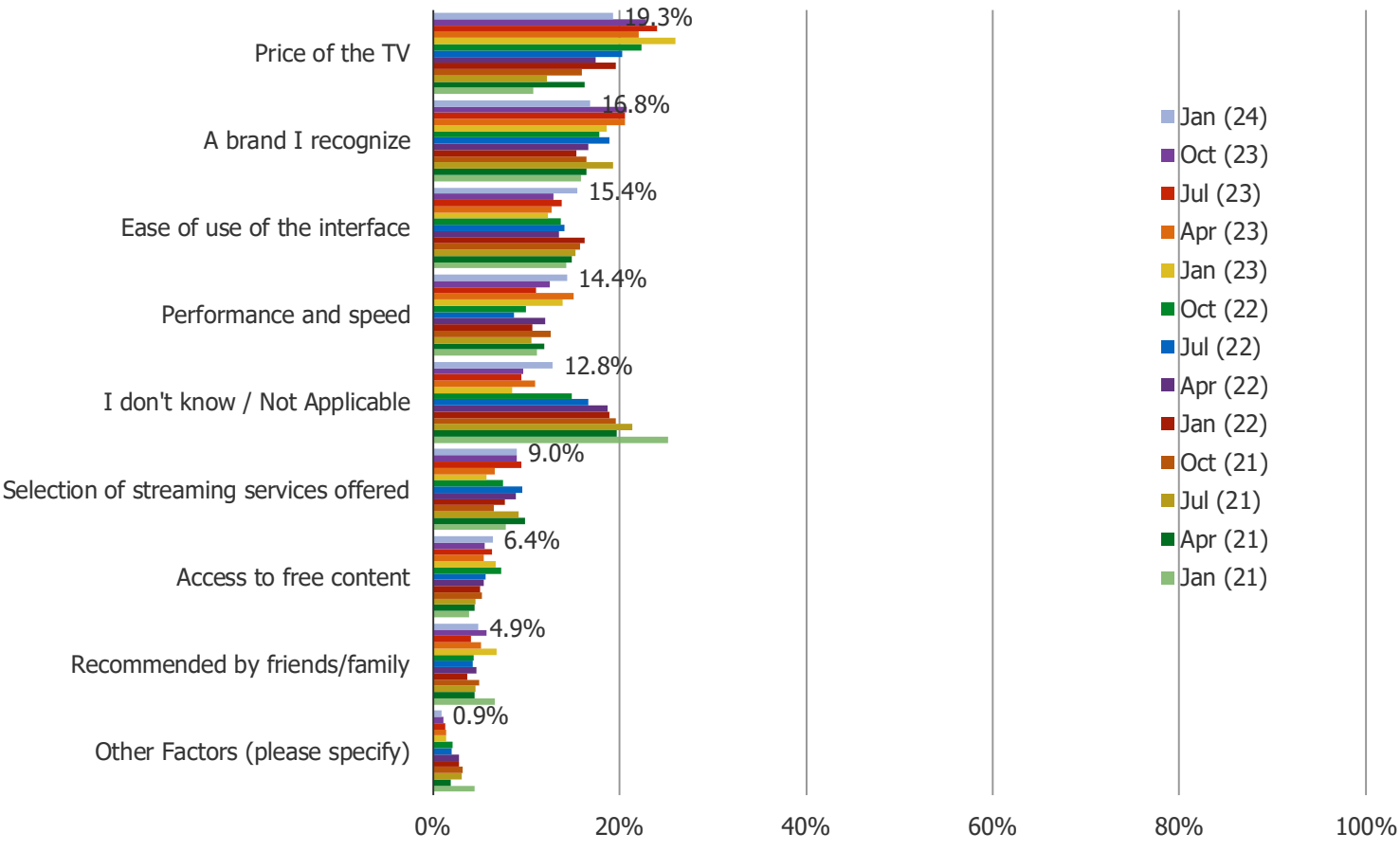
Posed to all respondents who either currently use a smart TV and/or have plans to purchase a smart TV in the next 12-18 months.



N = 654

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.



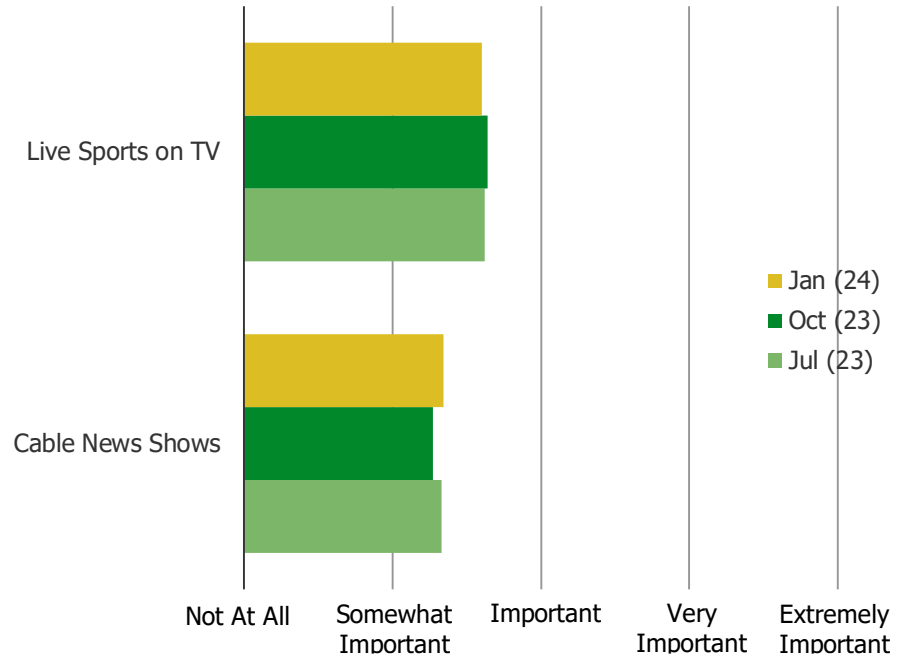
N = 654

## CABLE TV PERSONALITIES AND LIVE SPORTS/EVENTS

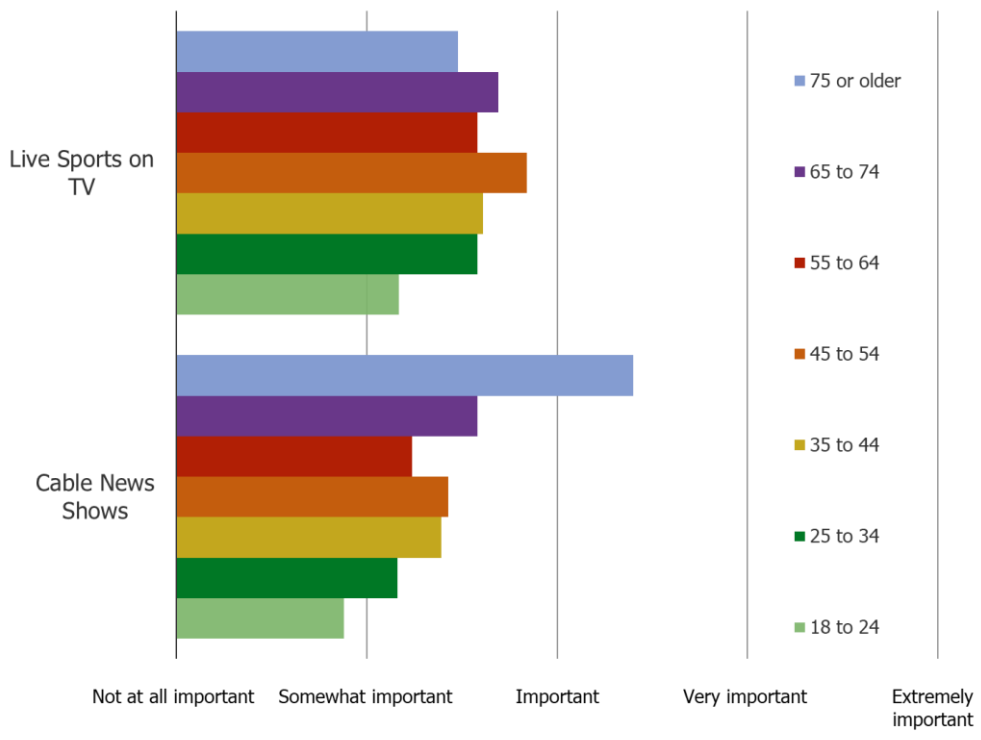


HOW IMPORTANT ARE THE FOLLOWING TO YOU...

Posed to all respondents.

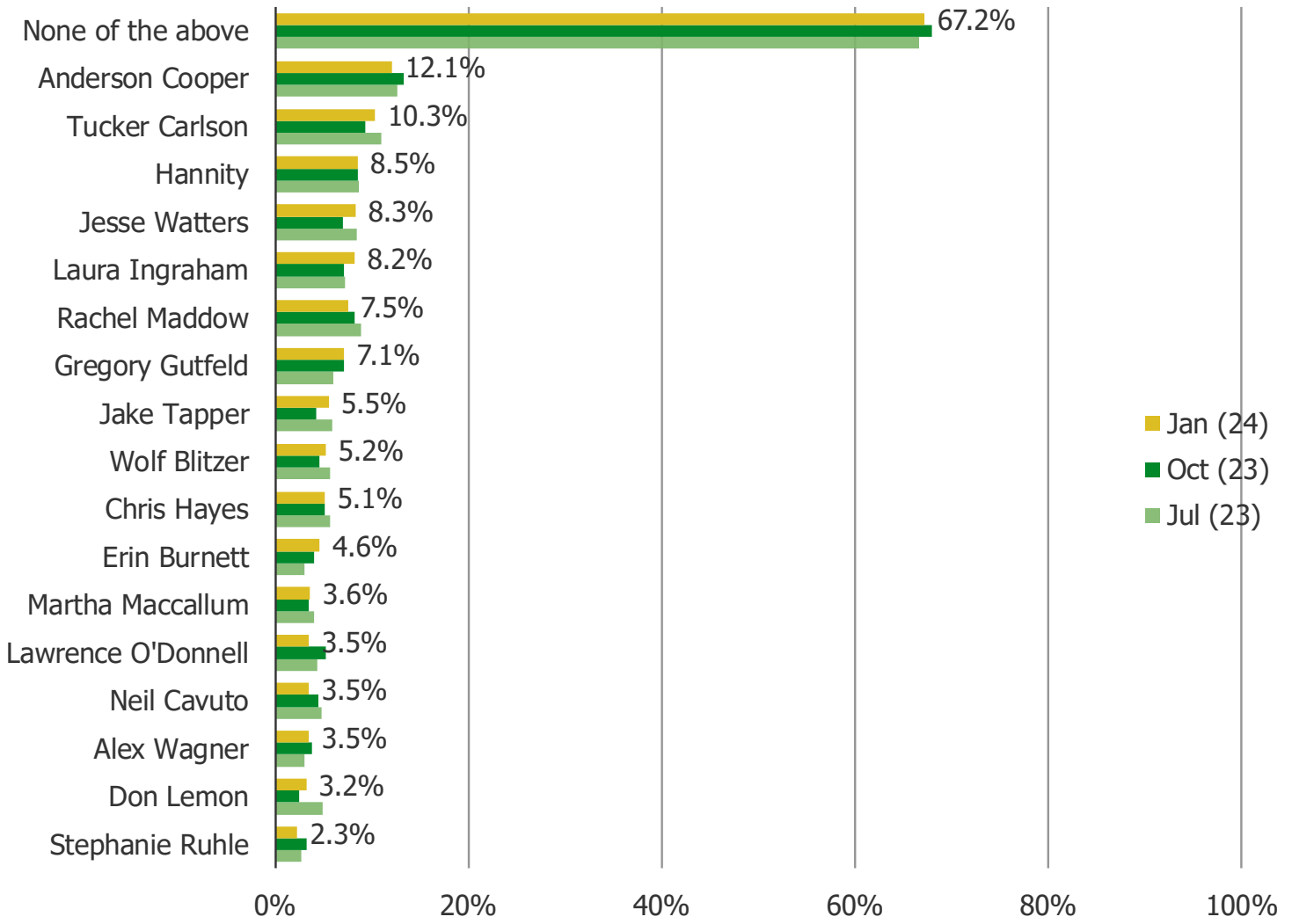


Cross-Tab (Weighted Averages)



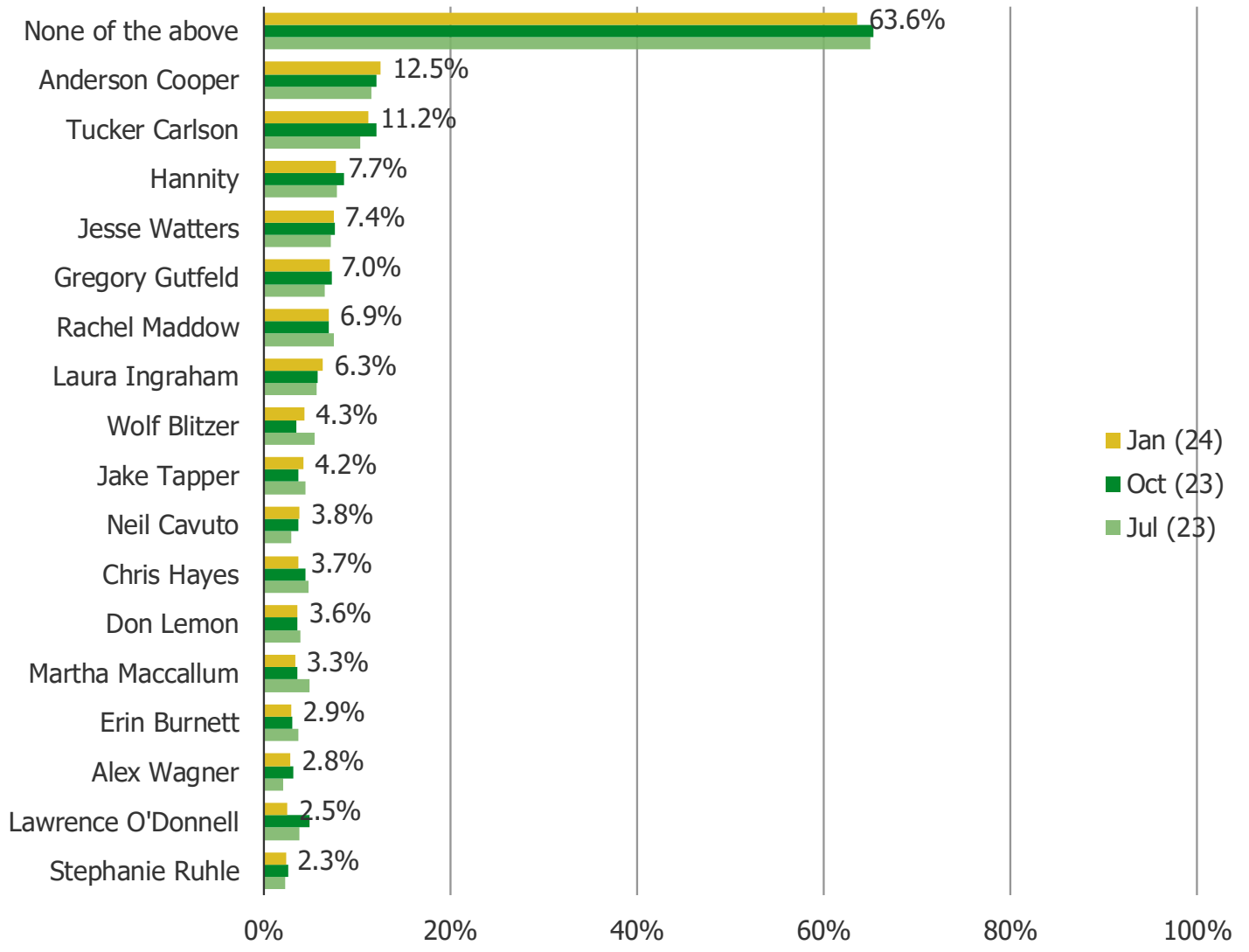
DO YOU WATCH ANY OF THE FOLLOWING REGULARLY? SELECT ALL THAT APPLY

Posed to all respondents.



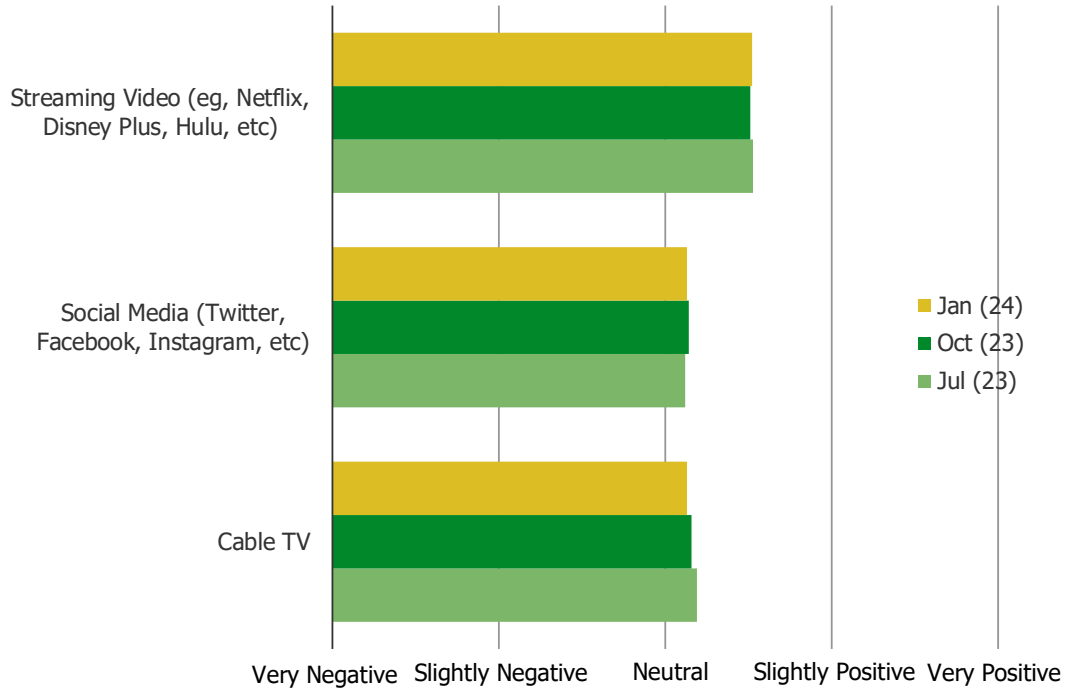
DO YOU CONSIDER YOURSELF A FAN OF ANY OF THE FOLLOWING? SELECT ALL THAT APPLY

Posed to all respondents.

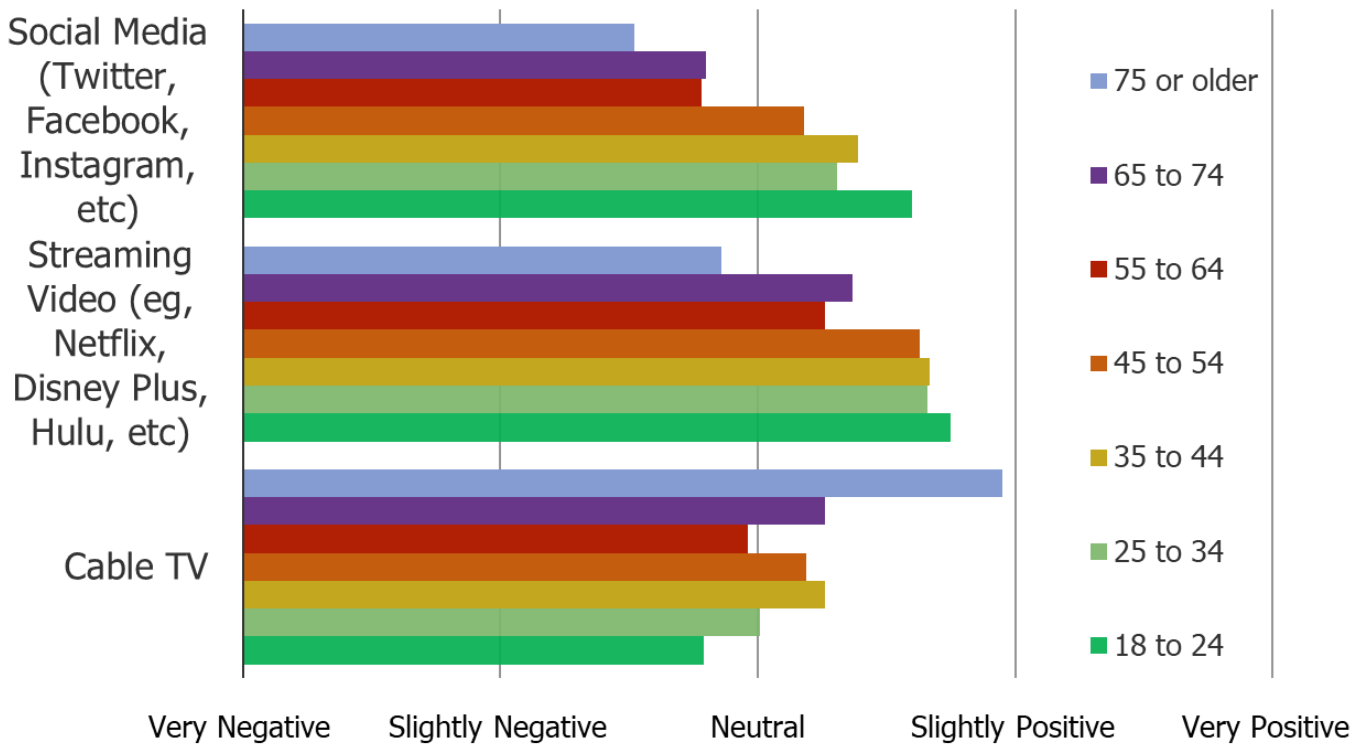


**HOW DO YOU FEEL ABOUT WATCHING YOUR FAVORITE CABLE MEDIA PERSONALITIES ON THE FOLLOWING PLATFORMS?**

Posed to all respondents.



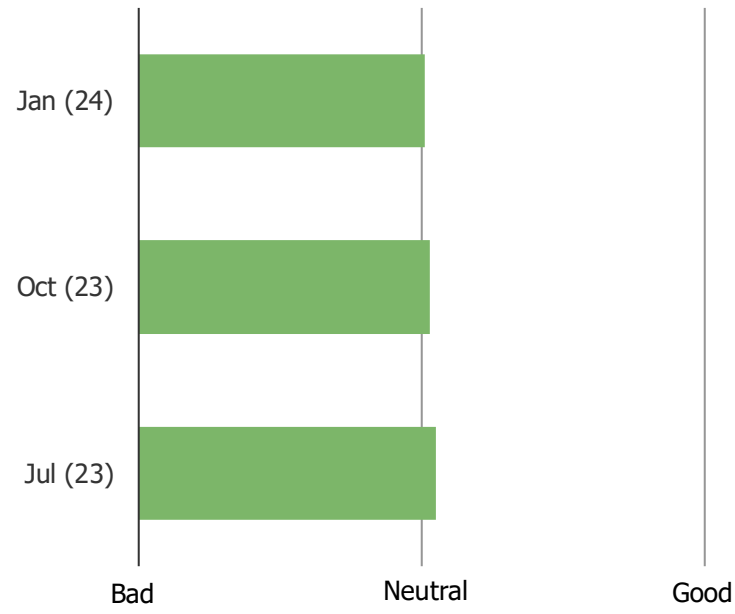
**Cross-Tabs (Weighted Averages)**





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)

