

BESPOKE SURVEYS

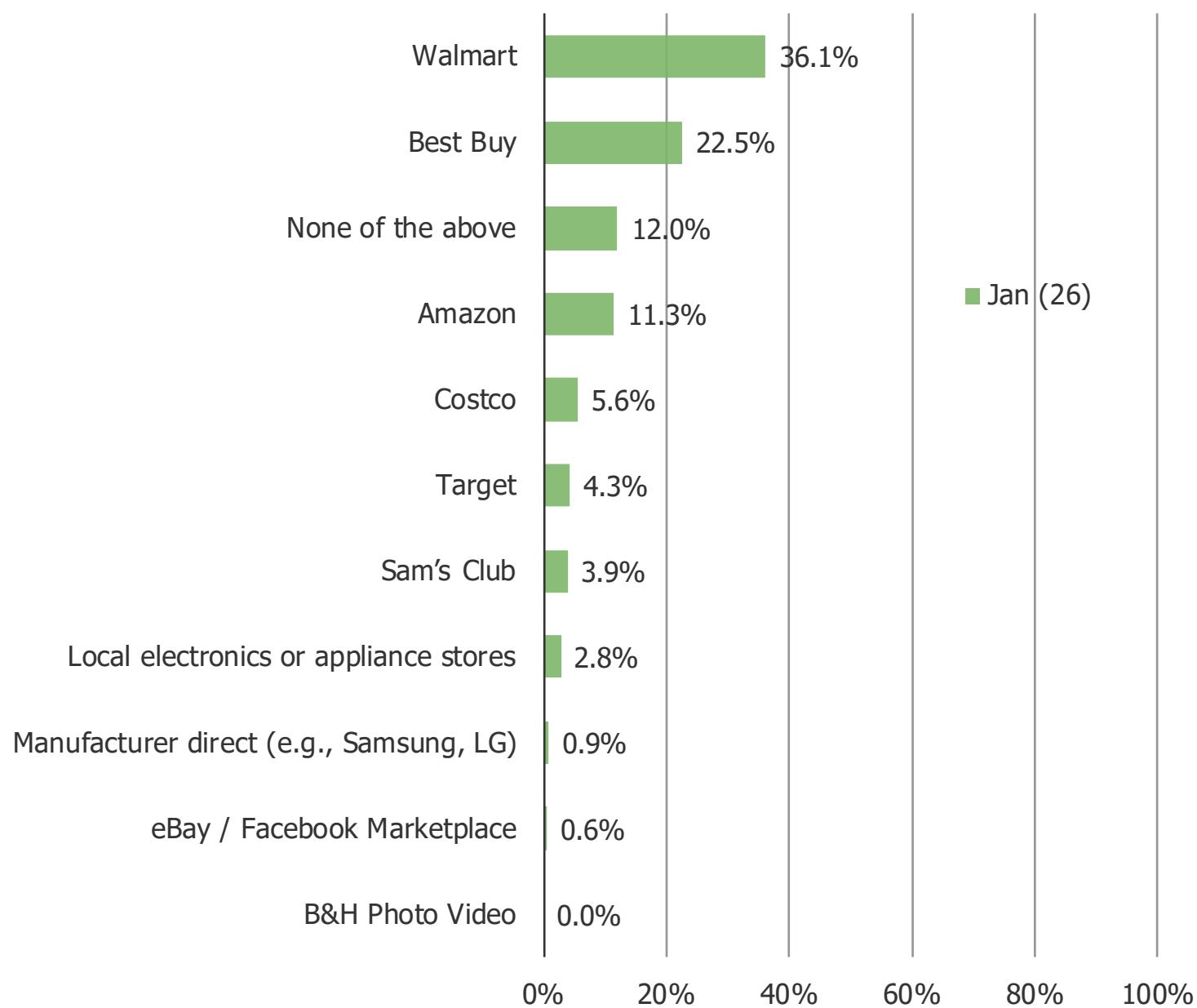
Streaming Players | Volume 21

1000+ Respondents Per Quarter

RECENTLY ADDED QUESTIONS

THINKING ABOUT THE TV YOU MOST RECENTLY BOUGHT, WHERE DID YOU GET IT FROM?

Posed to all respondents.



Factors Influencing Purchase: By Retailer (Tables)

Posed to all respondents.

% of comments mentioning each factor theme (multi-label)

Factor theme	Amazon (N=31)	Best Buy (N=70)	Costco (N=19)	Walmart (N=102)
Price / deal	61.3%	42.9%	57.9%	63.7%
Brand / trust	9.7%	20.0%	5.3%	7.8%
Features / OS	6.5%	7.1%	0.0%	3.9%
Picture quality	3.2%	8.6%	10.5%	3.9%
Reviews	0.0%	4.3%	0.0%	1.0%
Convenience / availability	3.2%	4.3%	0.0%	14.7%
Sales event	3.2%	10.0%	5.3%	2.9%
Membership / rewards / financing	3.2%	7.1%	10.5%	0.0%
Service / support / warranty	6.5%	4.3%	0.0%	0.0%
Size	9.7%	7.1%	5.3%	8.8%
Unclear / NR	3.2%	0.0%	5.3%	1.0%

OS / Streaming Platform Mentions (subset of "Features / OS")

% of comments mentioning OS / platform concepts

OS / platform mention	Amazon (N=31)	Best Buy (N=70)	Costco (N=19)	Walmart (N=102)
Any OS / streaming platform mention (Roku / Android / "operating system" / smart platform)	6.5%	7.1%	0.0%	3.9%
Roku specifically	3.2%	2.9%	0.0%	2.9%
Android / Android TV specifically	3.2%	0.0%	0.0%	0.0%
Generic "operating system / smart TV platform" wording	0.0%	1.4%	0.0%	1.0%

How to read this: OS/platform talk is not a dominant driver versus price, but it *does* show up consistently across Amazon / Best Buy / Walmart, and when it appears it's often Roku explicitly (i.e., consumers using Roku as a shorthand for "easy streaming experience")

Factors Influencing Purchase: By Retailer (Takeaways)

Posed to all respondents.

Takeaways (What's actually different by retailer)

1) Walmart and Amazon are overwhelmingly price-led

- Walmart (63.7%) and Amazon (61.3%) are the most price-dominant.
- Walmart has the highest convenience / availability footprint (14.7%) — lots of "close to me," "only place," "availability," etc.
- These channels read like: "get a deal / get something affordable / get it quickly and easily."

2) Best Buy is the most "premium decision process" retailer

Best Buy is the clear outlier in *non-price* drivers:

- Brand / trust = 20.0% (highest)
- Picture quality = 8.6% (highest besides Costco)
- Sales events = 10.0% (Black Friday / closeout / circulars)
- Membership/financing/rewards = 7.1% (credit card / financing / rewards)
- Plus in-store experience language (seeing it in store, sales associate, Geek Squad)

Best Buy reads like: "more considered purchase, more research + in-store validation."

3) Costco mixes price + quality + membership framing

- Still strongly price-led (57.9%)
- But higher "membership / rewards" mentions (10.5%) vs most retailers
- Also solid "picture quality" presence (10.5%) despite small base

Costco reads like: "value, but with quality confidence + member logic."

What Roku mentions are telling us (based on *your* text)

Roku is showing up in two distinct ways:

A) Roku as a "feature / built-in OS" driver

- Amazon: "It had Roku installed"
- Best Buy: "I wanted a Roku tv"
- Walmart: "Price, size, location, Roku os"

This is Roku functioning as a **product attribute** (like a spec), not just a brand.

B) Roku as familiarity / habit

- Walmart: "I grew up with Roku tvs..."

That's important because it implies Roku can act like a **default ecosystem choice**, not just "the cheap option."

Roku insight (retailer angle)

- **Walmart + Best Buy:** Roku appears as an intentional decision ("wanted a Roku TV") and tied into "price + size + OS" logic.
- **Amazon:** Roku appears more like an item spec encountered in the listing ("it had Roku installed").

Net: Roku isn't a dominant driver by volume, but when it shows up, it's being used as a **decision shorthand** for "easy streaming OS / familiar TV experience."

When you use this streaming device, are you typically plugging it into...

Jan 26 Wave: What % plug into Smart TVs vs. TVs w/ no built-in streaming access?

Device	TV w/ no built-in streaming apps	Smart TV w/ built-in streaming apps
Google Chromecast	53.2%	46.8%
Amazon Fire Stick	37.4%	62.6%
Roku Player	38.8%	61.2%
Apple TV	35.2%	64.8%

Which smart TVs are streaming players being plugged into... 

Streaming Device "Plugged Into" (TV Manufacturer) — Other-Specify Only

Time: 2025Q2–2026Q1 | Total Other-specify N=1,391

Top "Plugged Into" TV Manufacturers + Change Over Time

Device	Other N	#1 TV Make	#2 TV Make	#3 TV Make	Notable Change Over Time (trend / significance)
Apple TV	134	Samsung (29.9%)	Sony (13.4%)	LG (12.7%)	No statistically meaningful mix shifts detected
Roku Player	655	Samsung (22.7%)	LG (13.4%)	Vizio (13.0%)	Roku TV mentions rising: +2.0 pts/qtr, p≈0.027
Amazon Fire Stick	494	Samsung (31.0%)	LG (13.6%)	Vizio (12.8%)	Directional: Samsung rising (p≈0.061), Vizio falling (p≈0.056)
Google Chromecast	108	Samsung (25.9%)	Vizio (12.0%)	LG (10.2%)	Small N; directional: Sony falling (p≈0.089)

Summary Observations (by player)

Apple TV

Smart TV usage is consistently high (~mid-70s). "Plugged into" manufacturer mix is Samsung-led and stable.

Roku Player

Lowest Smart TV skew (high non-smart usage), consistent with Roku's "add streaming" role. Only device with a statistically significant rise in "Roku TV" endpoints over time.

Amazon Fire Stick

Mid-60s Smart TV skew, stable over time. "Other" brand mentions skew most heavily toward Samsung and show mild directional drift (Samsung up, Vizio down).

Google Chromecast

Smart TV skew is steady (~60%). Manufacturer mix is Samsung-led, but small "Other" N limits confidence on shifts.

YOU MENTIONED THAT YOU PLUG THIS STREAMING PLAYER INTO A SMART TV THAT CAN STREAM APPS ON ITS OWN. WHY DO YOU USE THIS STREAMING PLAYER INSTEAD OF JUST USING THE SMART TV TO STREAM APPS?

Posed to all respondents who use the following streaming players on smart TVs.

Total N (all verbatims): 2,026

- **Roku Player:** N=852
- **Amazon Fire Stick:** N=686
- **Apple TV:** N=323
- **Google Chromecast:** N=165

Note: Multi-label coding → a single comment can count in multiple reason buckets.

Why use a streaming player vs Smart TV interface? (% of comments)

Reason (multi-label)	Apple TV	Roku Player	Amazon Fire Stick	Chromecast
Smart TV is bad / old / limited	4.3%	7.9%	6.4%	8.5%
Better app selection / more apps	15.8%	11.6%	10.5%	10.3%
Ease of use / UI / navigation	7.4%	5.8%	6.6%	3.6%
Speed / performance / less lag	2.5%	2.9%	3.4%	2.4%
Reliability / fewer glitches	2.2%	1.8%	2.3%	1.8%
Preference / habit / familiar	3.4%	2.8%	2.8%	2.4%
Features (voice, remote, casting, etc.)	2.8%	1.8%	2.0%	3.6%
Better picture / sound quality	3.1%	1.8%	2.2%	1.8%
Account/login / ecosystem convenience	2.8%	0.8%	1.0%	1.2%
Other / unclear / too generic	65.0%	68.5%	68.2%	66.1%

YOU MENTIONED THAT YOU PLUG THIS STREAMING PLAYER INTO A SMART TV THAT CAN STREAM APPS ON ITS OWN. WHY DO YOU USE THIS STREAMING PLAYER INSTEAD OF JUST USING THE SMART TV TO STREAM APPS?

Posed to all respondents who use the following streaming players on smart TVs.

Insights (what this is really saying)

1) "Better app selection" is the #1 concrete reason across devices

This is the biggest consistent driver, and it's especially pronounced for Apple TV (15.8%).

The narrative here is: the player is the "real streaming hub," even if the TV technically has apps.

2) Roku + Chromecast skew more toward "Smart TV is limited / bad / outdated"

- Roku: 7.9%
- Chromecast: 8.5% (highest)

These users are explicitly saying: "*TV interface isn't good enough, so I bypass it.*"

3) Fire Stick has the strongest "performance / reliability" angle

Fire Stick leads on:

- Speed/performance: 3.4% (highest)
- Reliability: 2.3% (highest)

This reads like a "workhorse" decision: fewer glitches / smoother experience than the TV UI.

4) Ease-of-use matters most for Apple TV

Apple TV leads on UI/ease-of-use (7.4%), plus top-tier on "apps."

This supports a "preference-based" choice (people *want* the Apple TV interface).

5) The big meta-signal: Smart TVs aren't "winning the interface war"

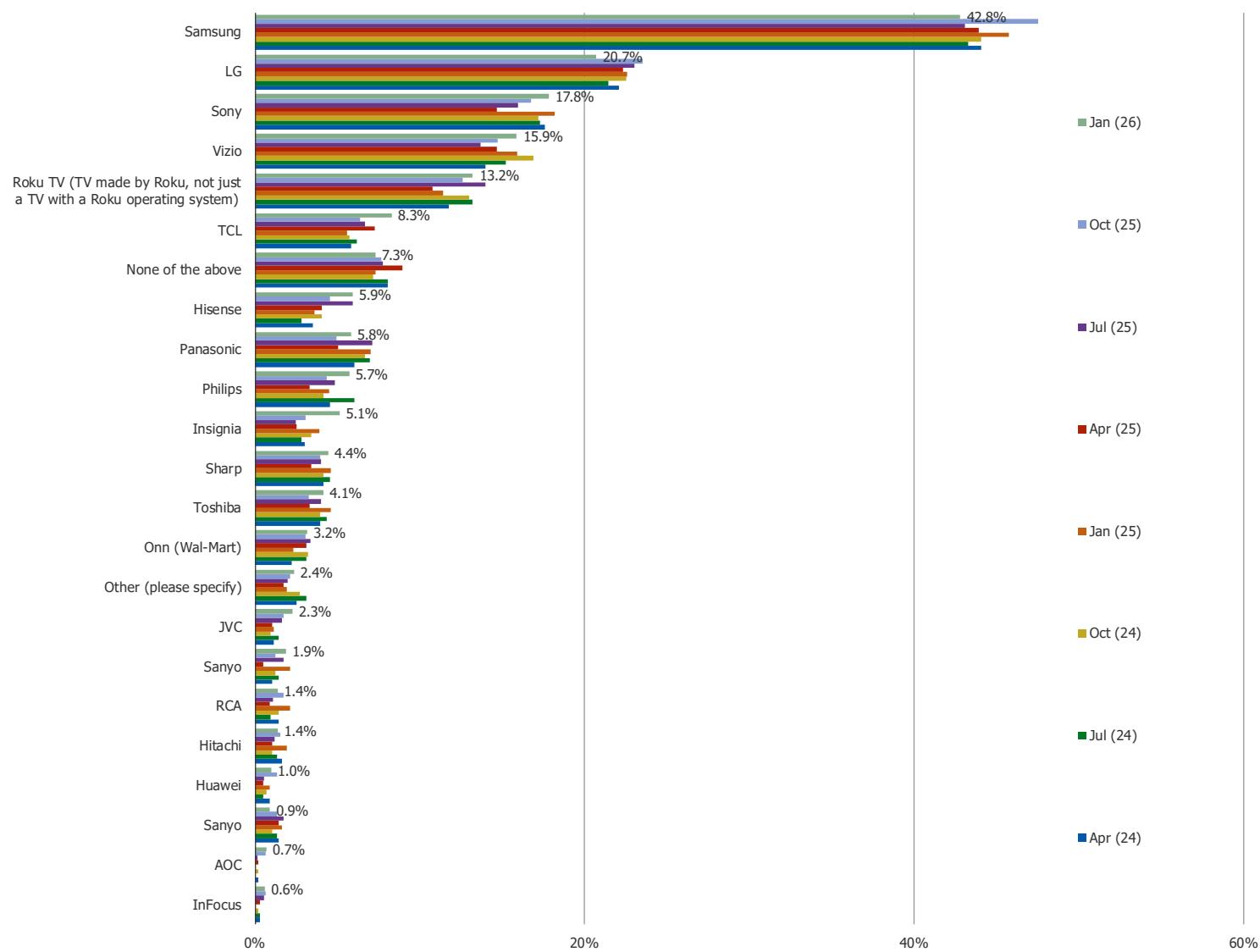
Even among respondents using Smart TVs, enough people still say:

- "TV is old / slow / limited"
- "player has better apps"
- "player is easier"

...meaning the streaming player remains a meaningful part of the household stack, not redundant hardware.

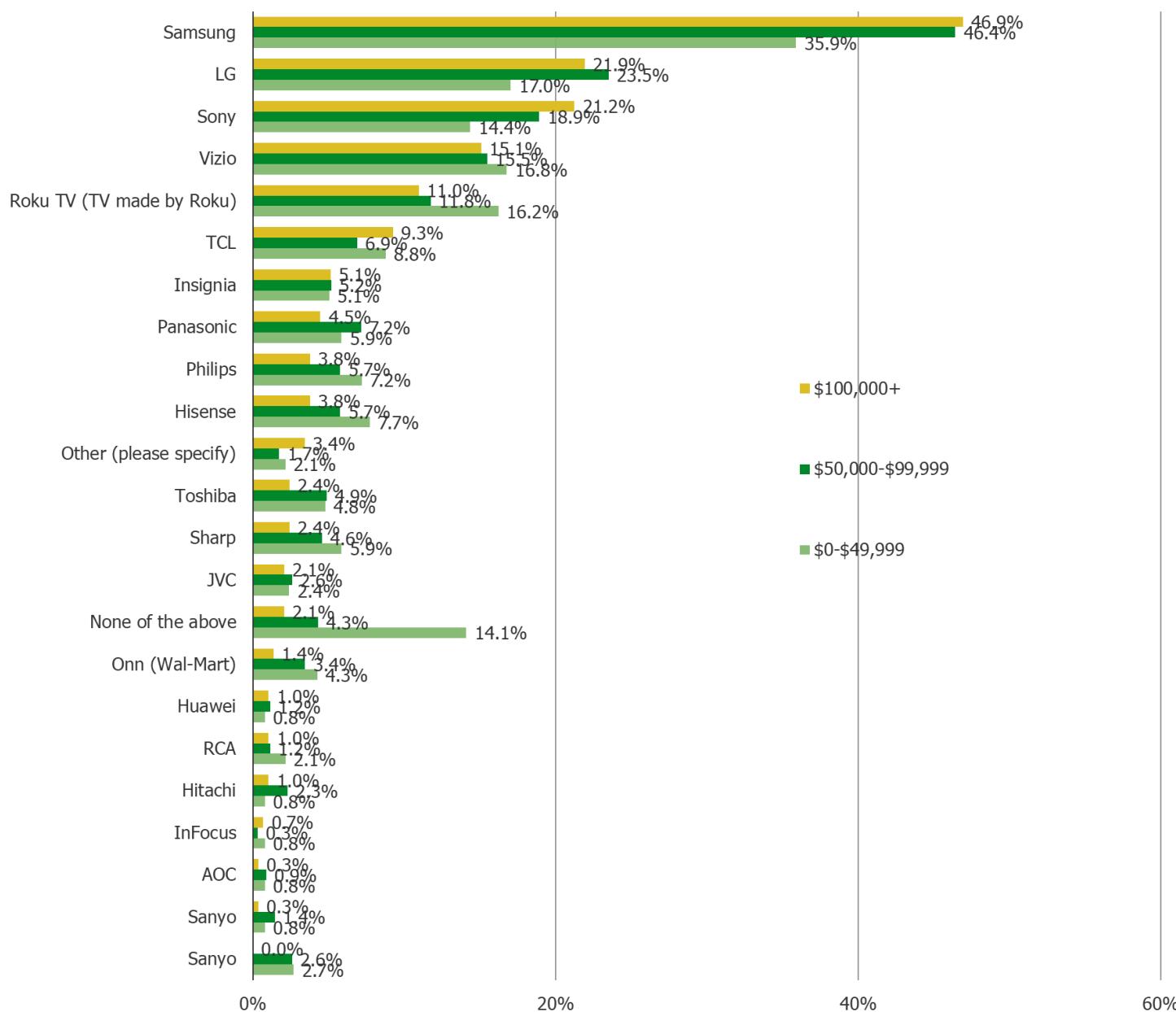
IF YOU WERE BUYING A TV TODAY, WHICH WOULD BE MOST LIKELY TO BUY?

Posed to all respondents.



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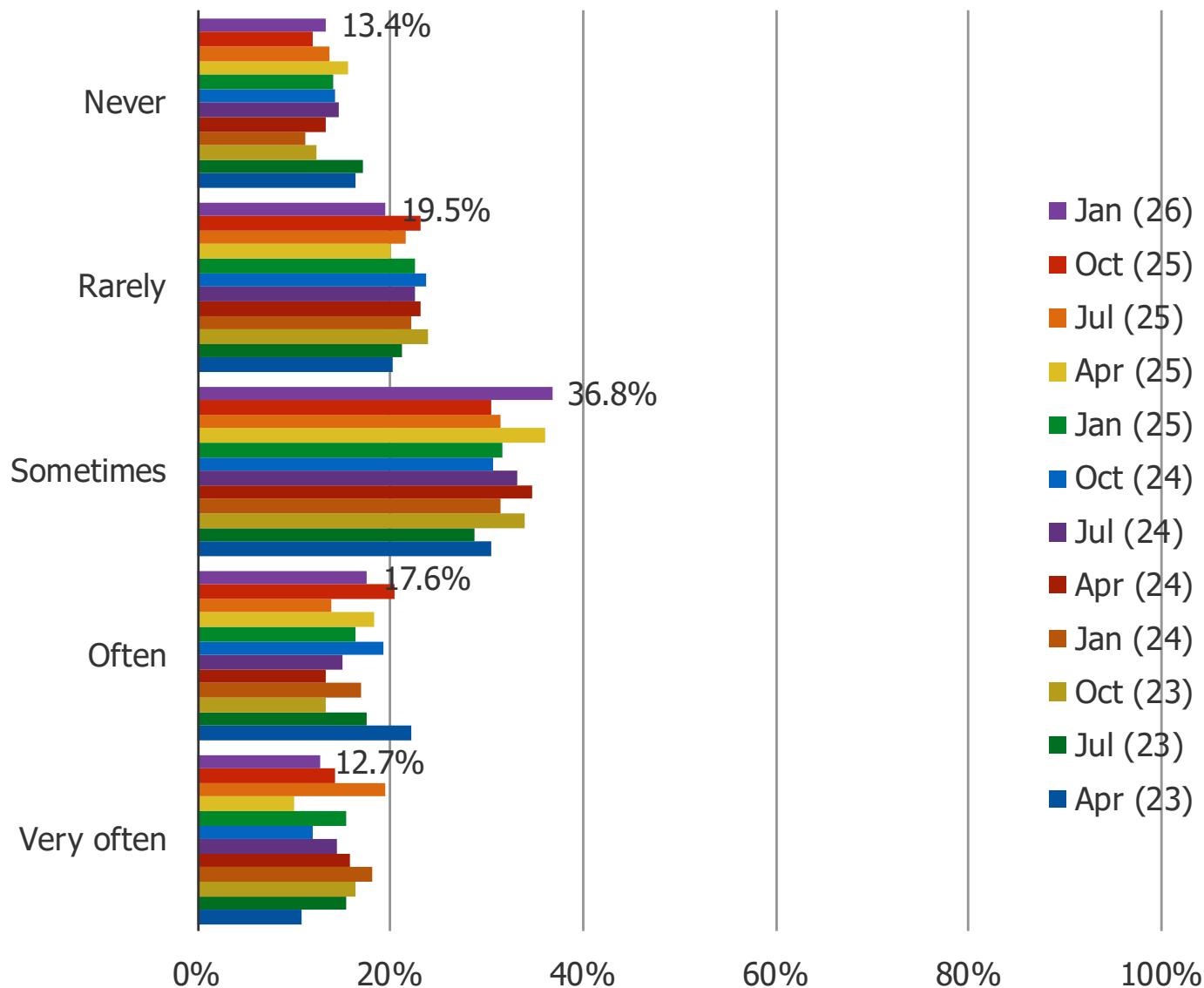
Posed to all respondents, cross-tabbed by income.



ROKU CHANNEL AND A TV MANUFACTURED BY ROKU

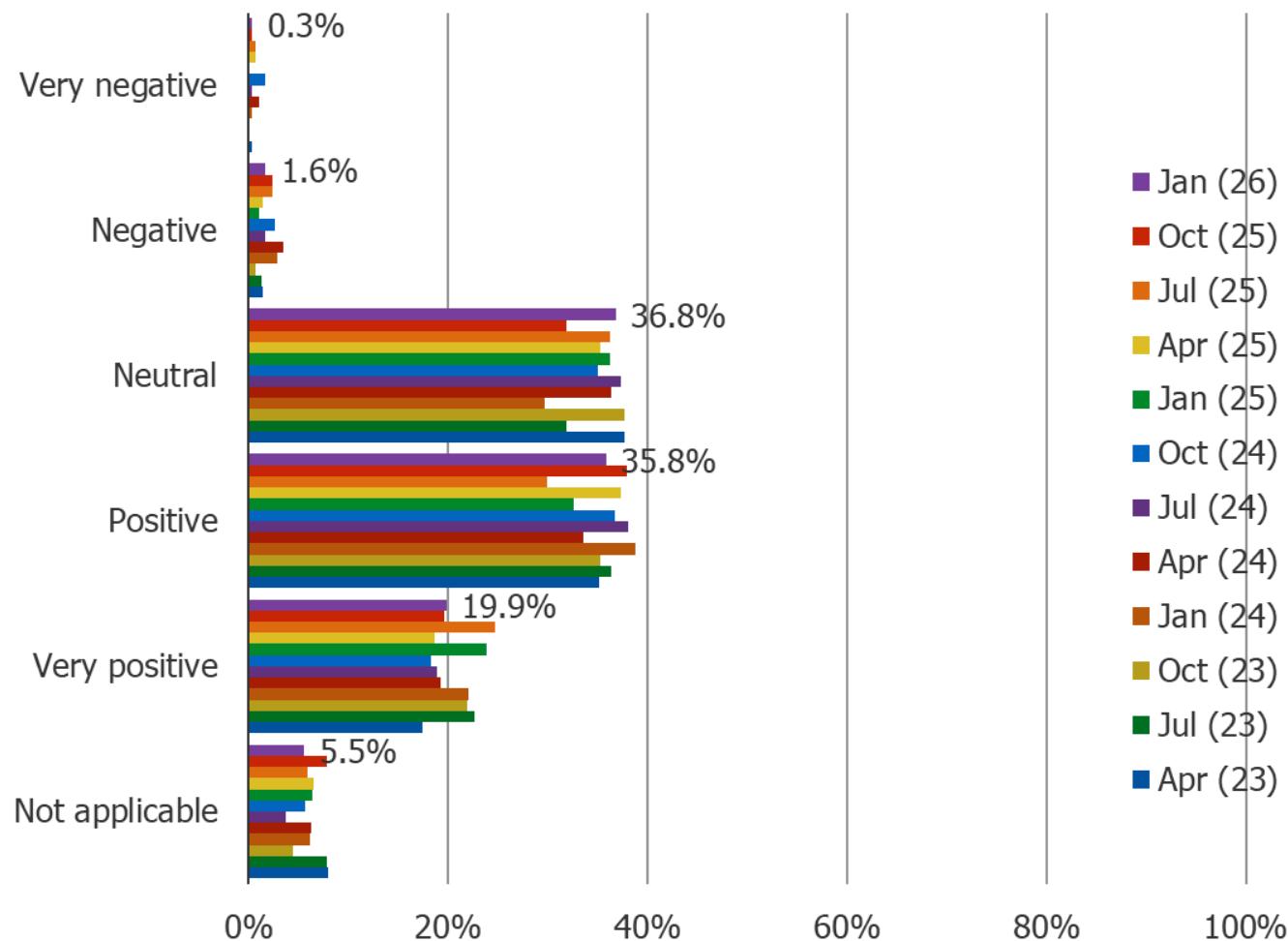
HOW OFTEN DO YOU WATCH THE ROKU CHANNEL?

Posed to respondents who have a TV that uses the Roku OS or owns a Roku streaming player (N = 308).



WHAT IS YOUR OPINION OF THE ROKU CHANNEL?

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



WHAT IS YOUR OPINION OF THE ROKU CHANNEL? (OPTIONAL FILL-IN REASON ANALYSIS)

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

Positive drivers

Base: Positive / Very Positive (N=114)

Why positive	%
Good selection / variety ("lots to watch")	53%
Free / good value	28%
Old shows / classics / nostalgia	26%
Good shows / good movies (general quality)	23%
Easy / convenient / works well	6%
Kids / family content	6%

Negative drivers

Base: Negative / Very Negative (N=12)

Why negative	%
Too many ads / commercials	42%
Low quality / "content poor" / low-budget	33%
Not enough content I want / not diverse	25%
Nothing new / mostly old	17%

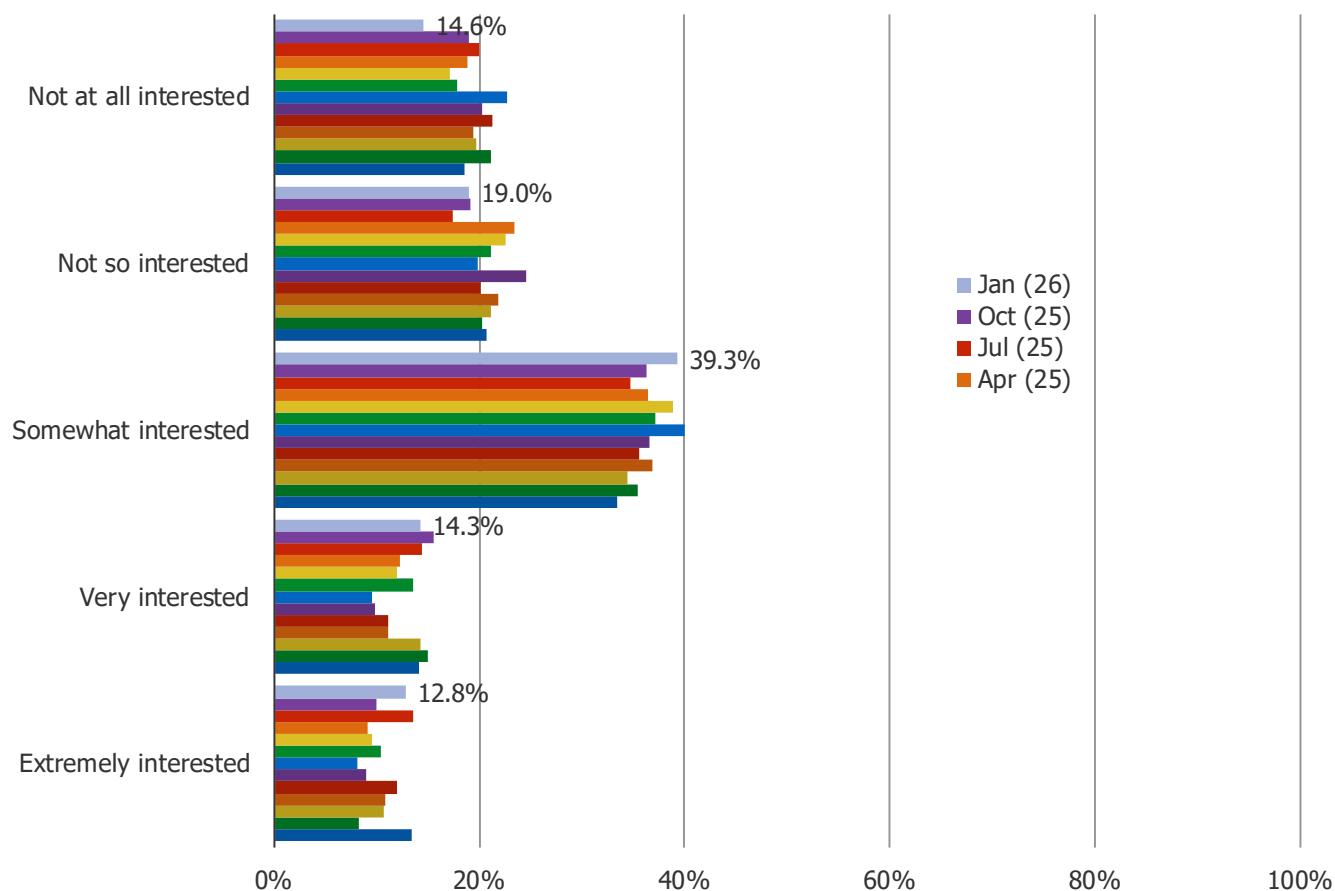
Neutral / Not Applicable = mostly "non-usage"

Base: Neutral / N/A (N=92)

Why neutral / N/A	%
Don't use it / don't watch it / rarely use	57%
Don't know / not familiar / can't recall	19%
Skip it (use other apps instead) / not enough for me	13%
Mentions ads but not fully negative	9%

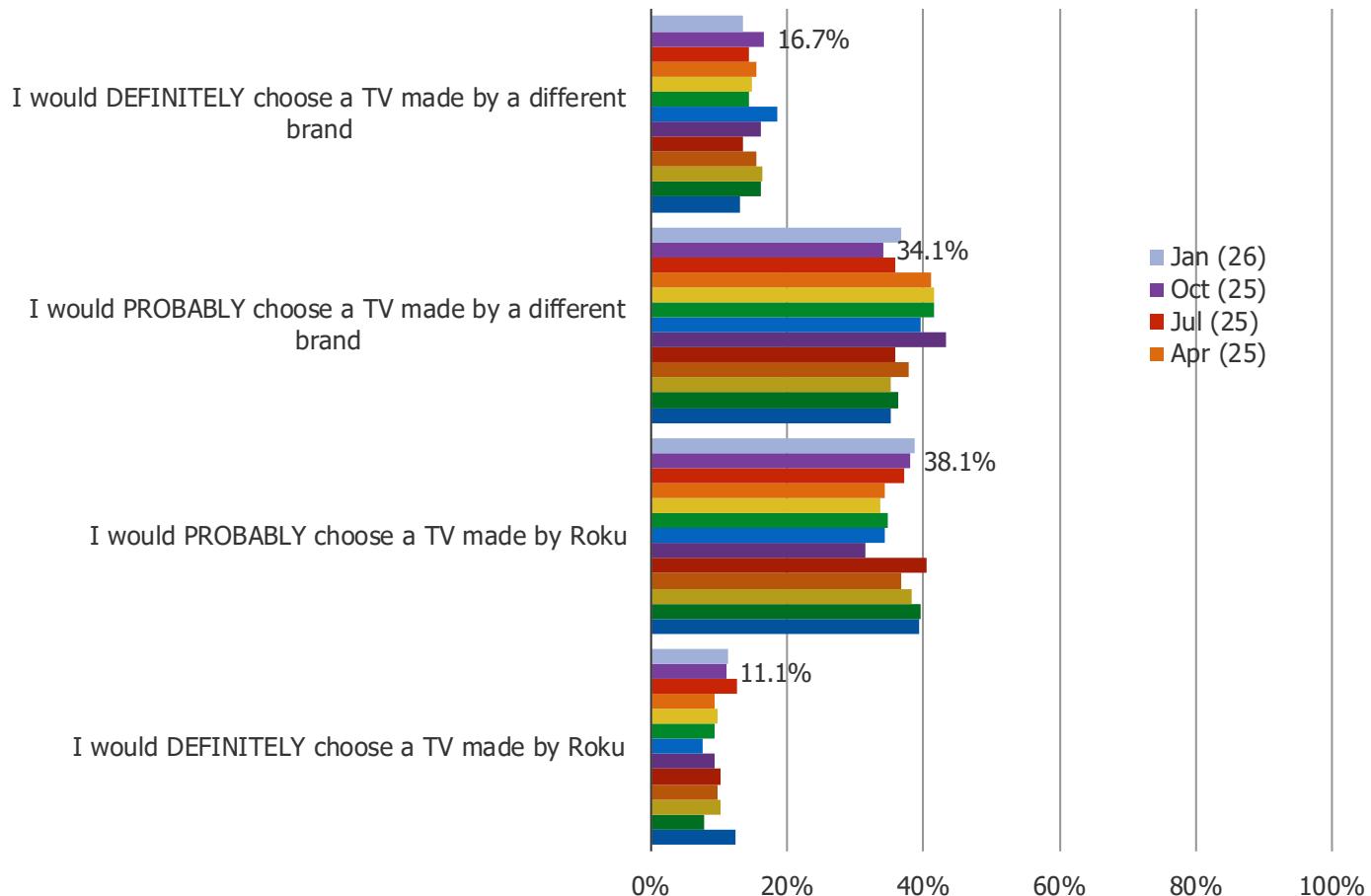
HOW INTERESTED WOULD YOU BE IN GETTING A TV THAT WAS ACTUALLY MANUFACTURED BY ROKU?

Posed to all respondents.



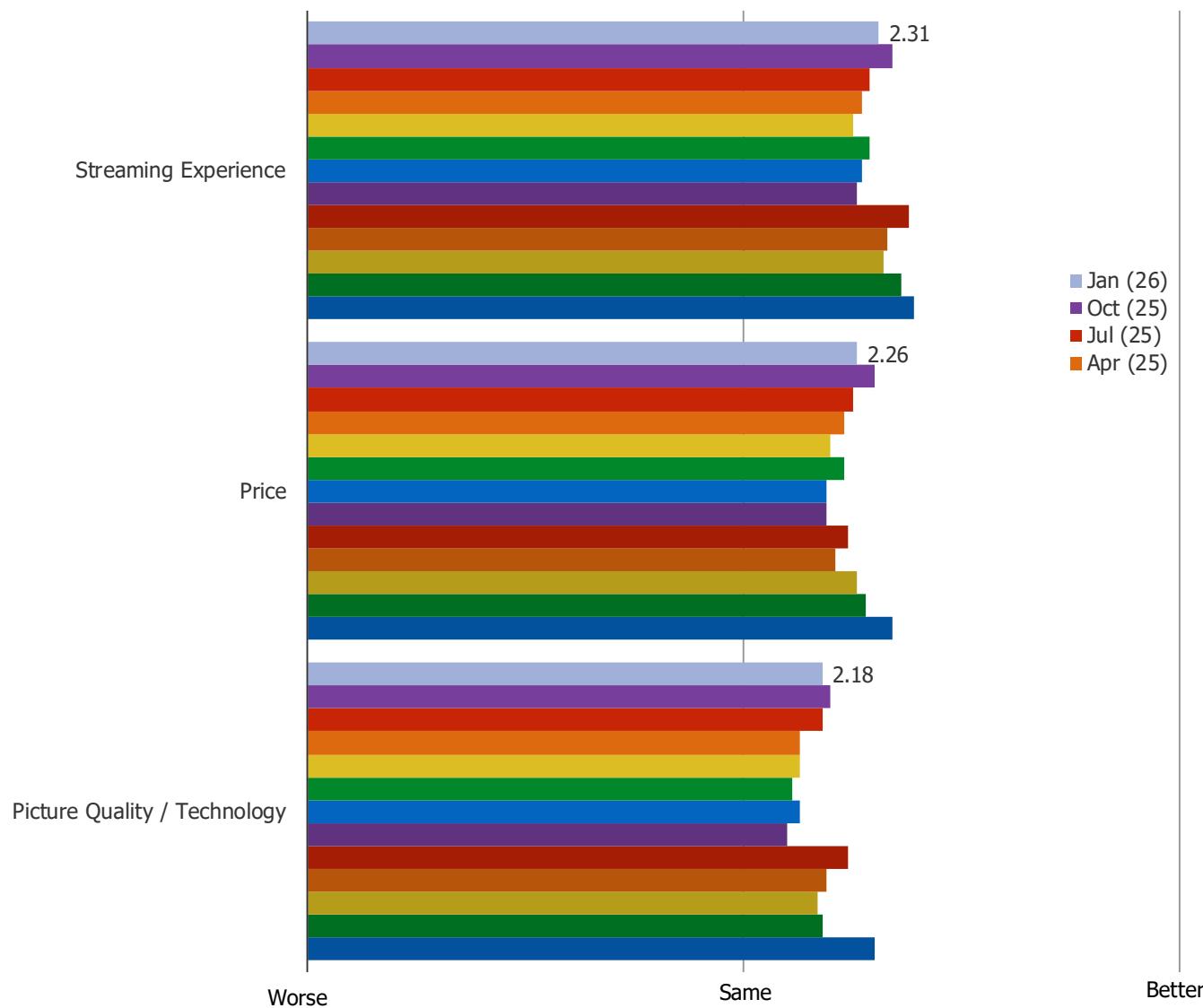
HOW LIKELY WOULD YOU BE TO BUY A TV THAT WAS MANUFACTURED BY ROKU WHEN YOU ARE BUYING YOUR NEXT TV?

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...

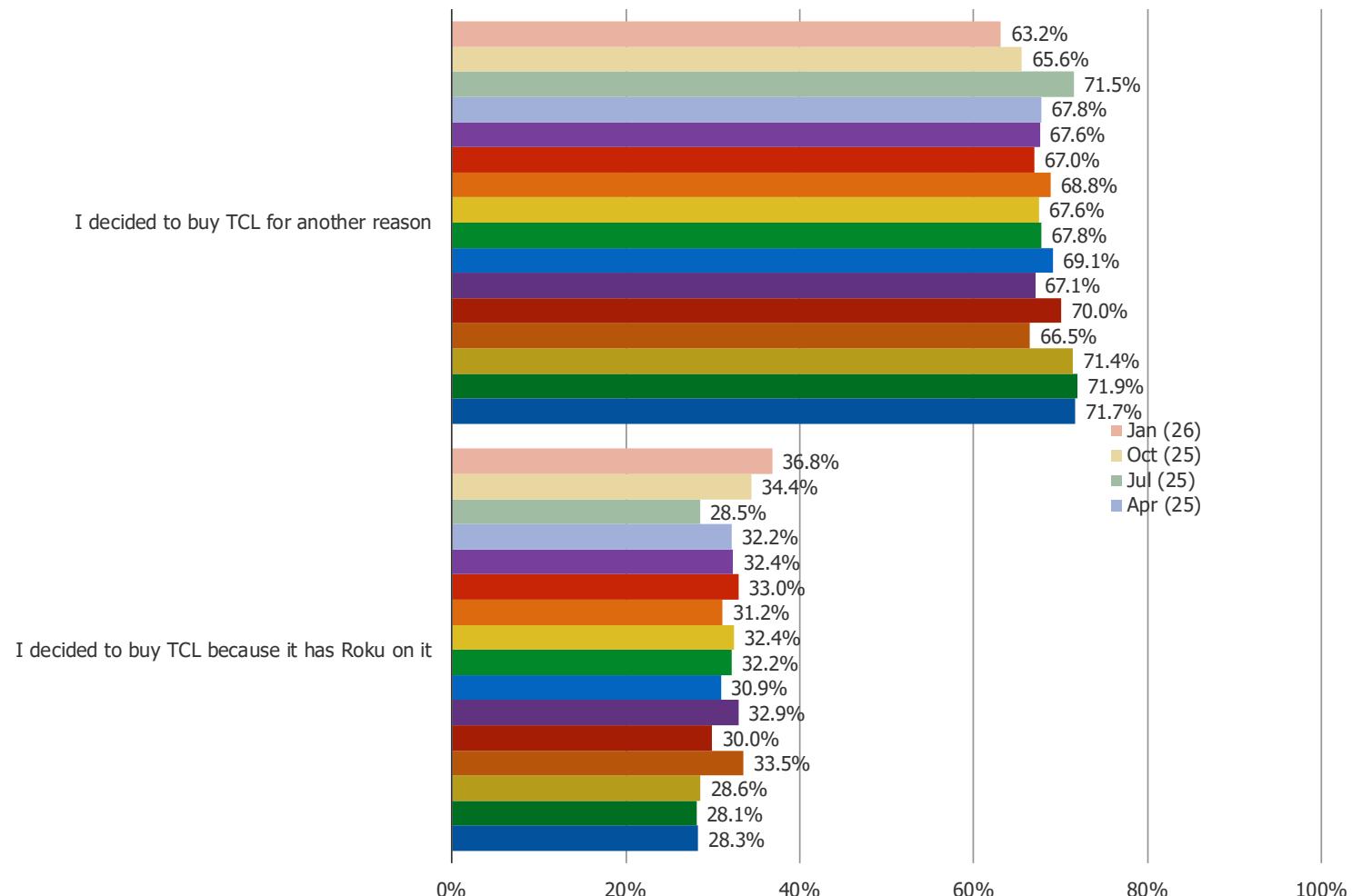
Posed to all respondents.



MORE ROKU AND TV QUESTIONS

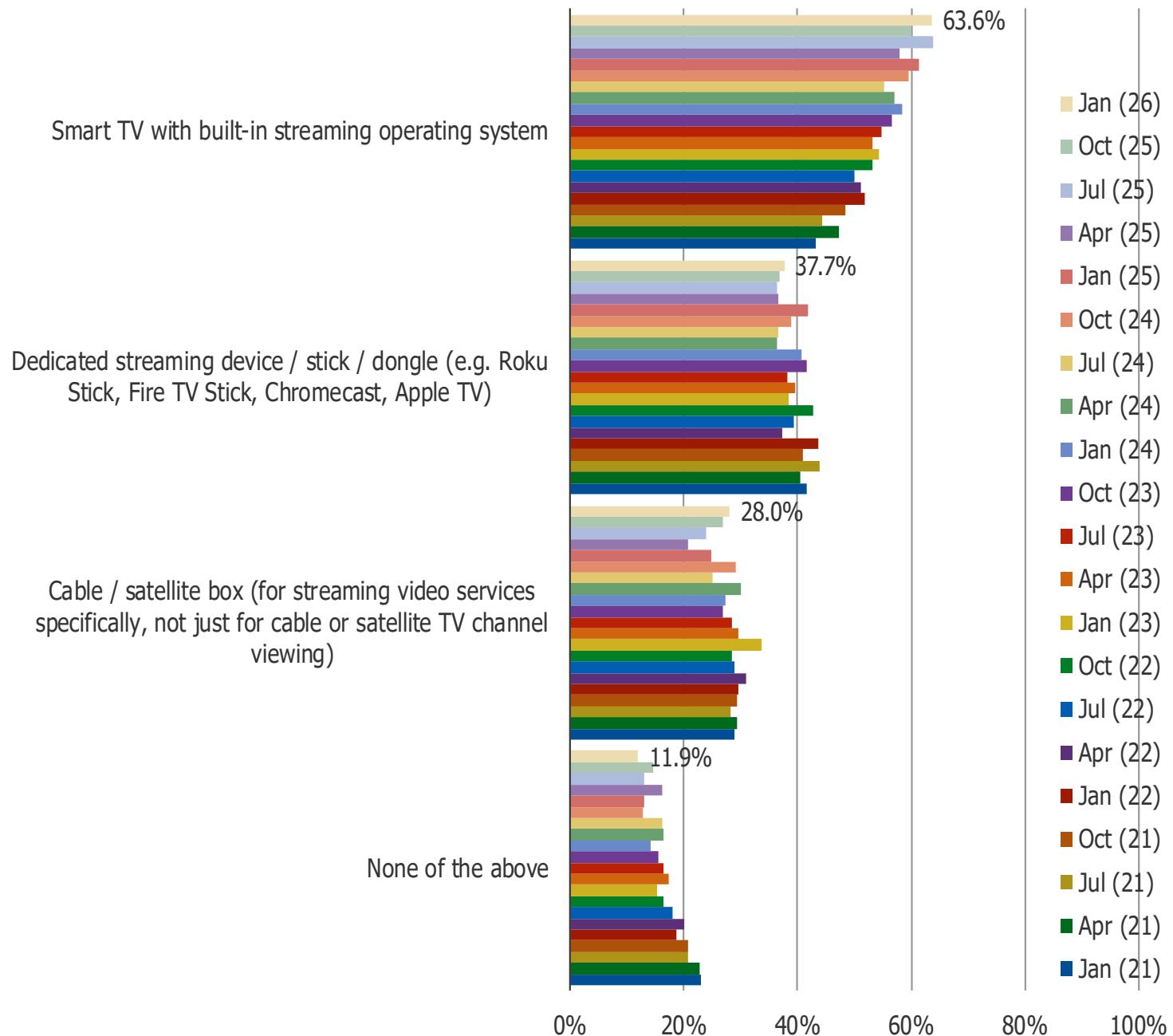
THINKING ABOUT YOUR TCL TV, WHICH OF THE FOLLOWING DESCRIBES YOU...

Posed to all respondents who have a TCL TV.



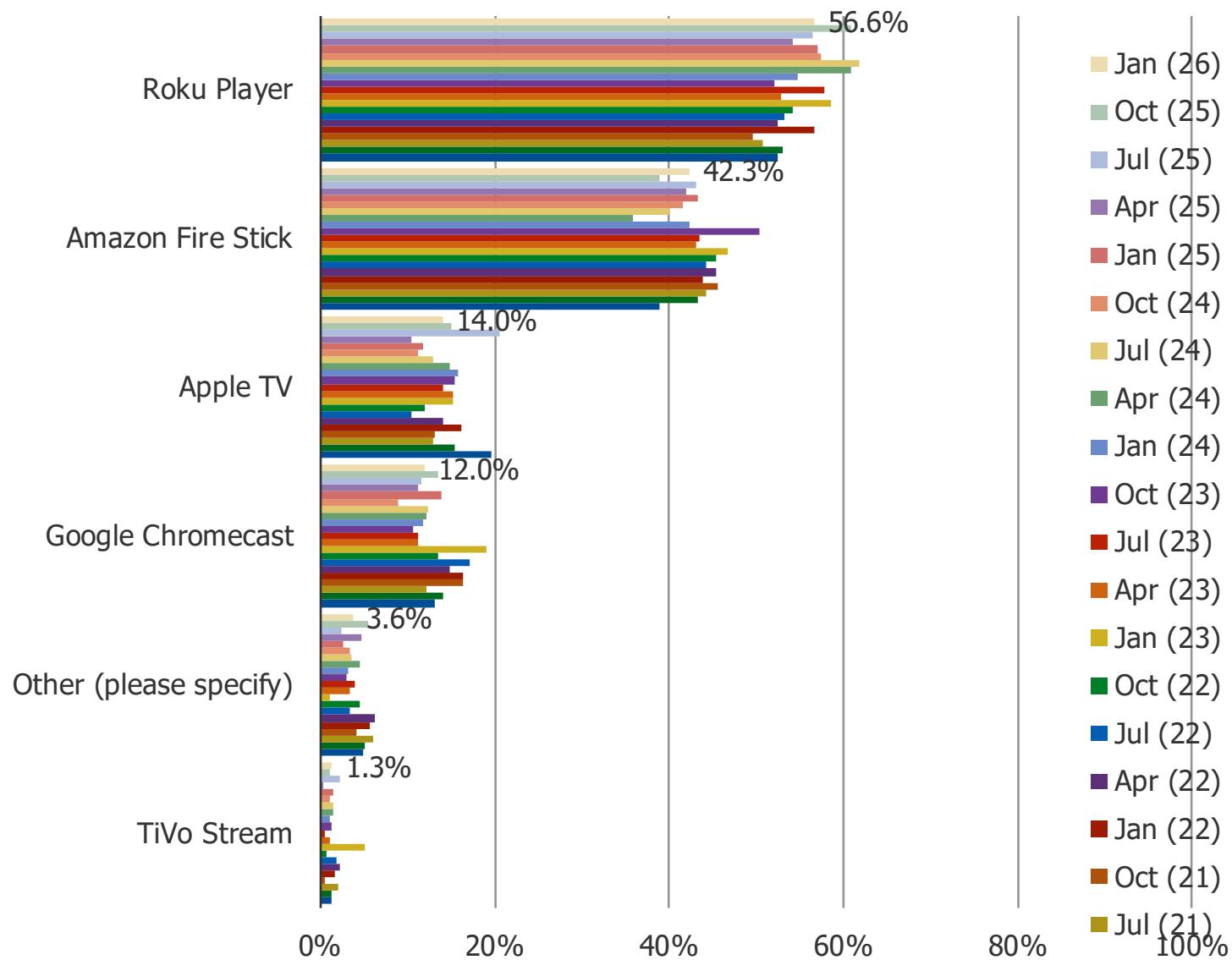
WHAT HARDWARE DO YOU USE TO WATCH STREAMING VIDEO ON YOUR TV? (SELECT ALL THAT APPLY)

Posed to all respondents.



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

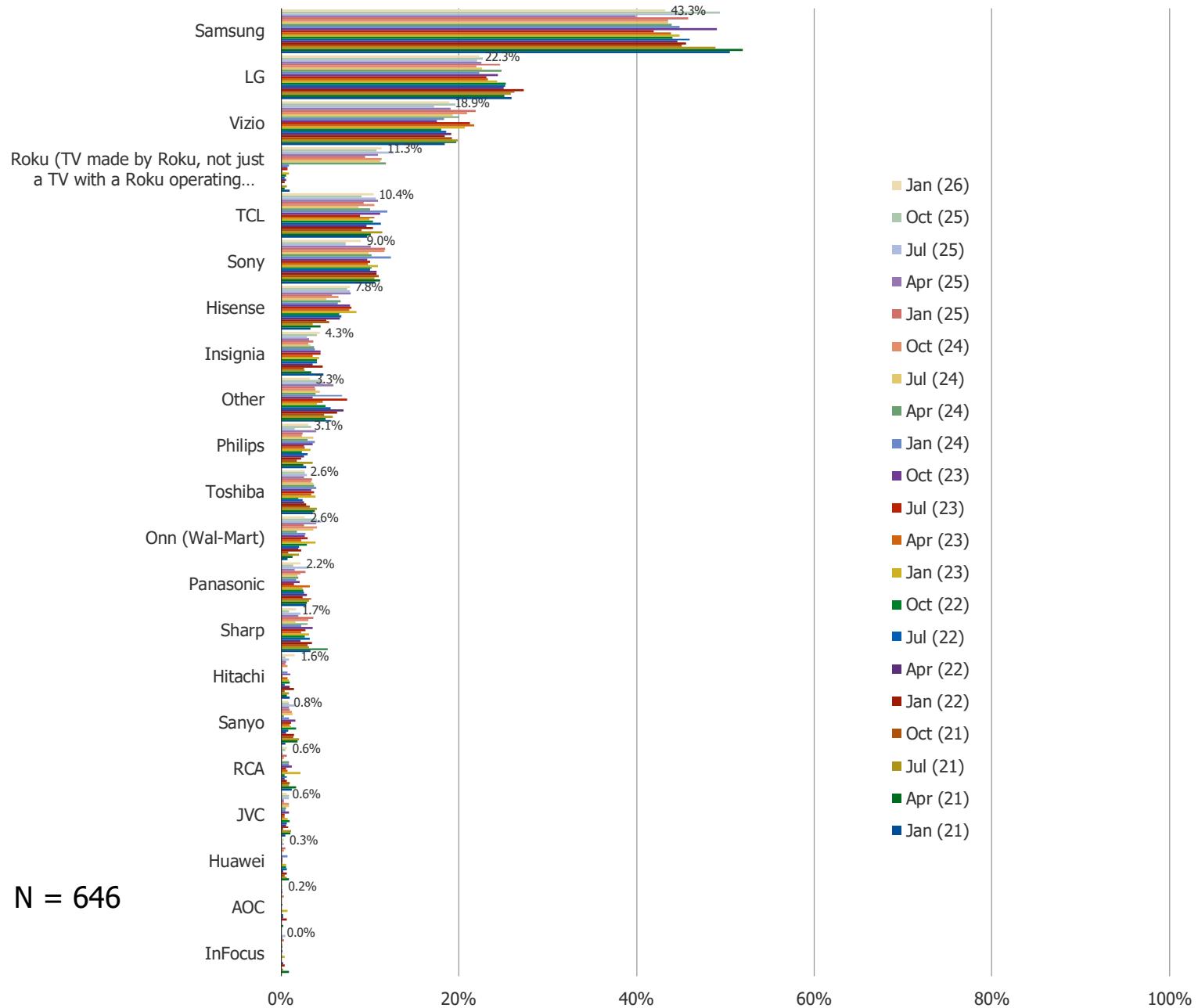
Posed to all respondents who use streaming devices.



N = 387

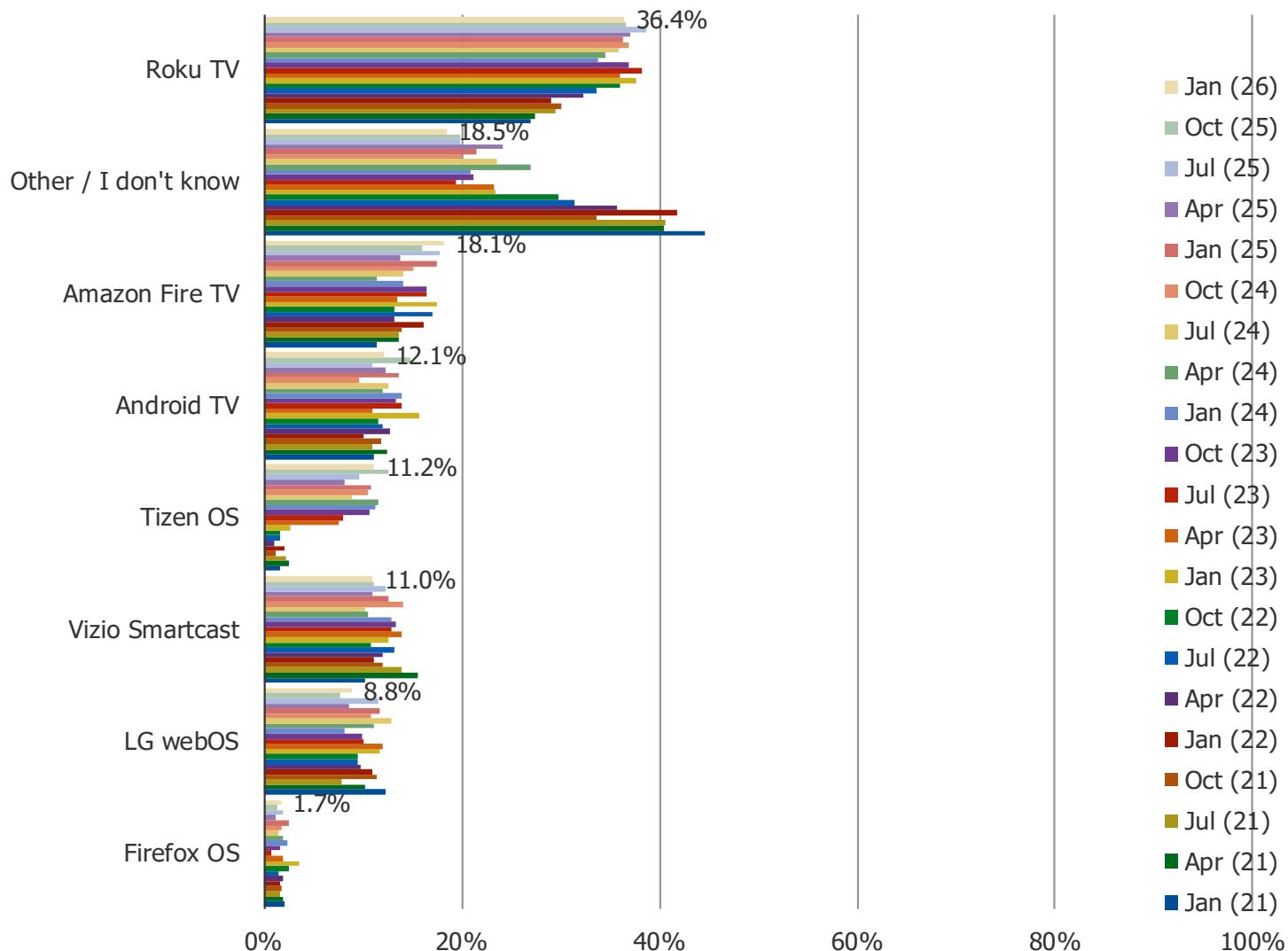
WHICH BRAND OF SMART TV DO YOU HAVE? (SELECT ALL THAT APPLY)

Posed to all respondents who own a smart TV.



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

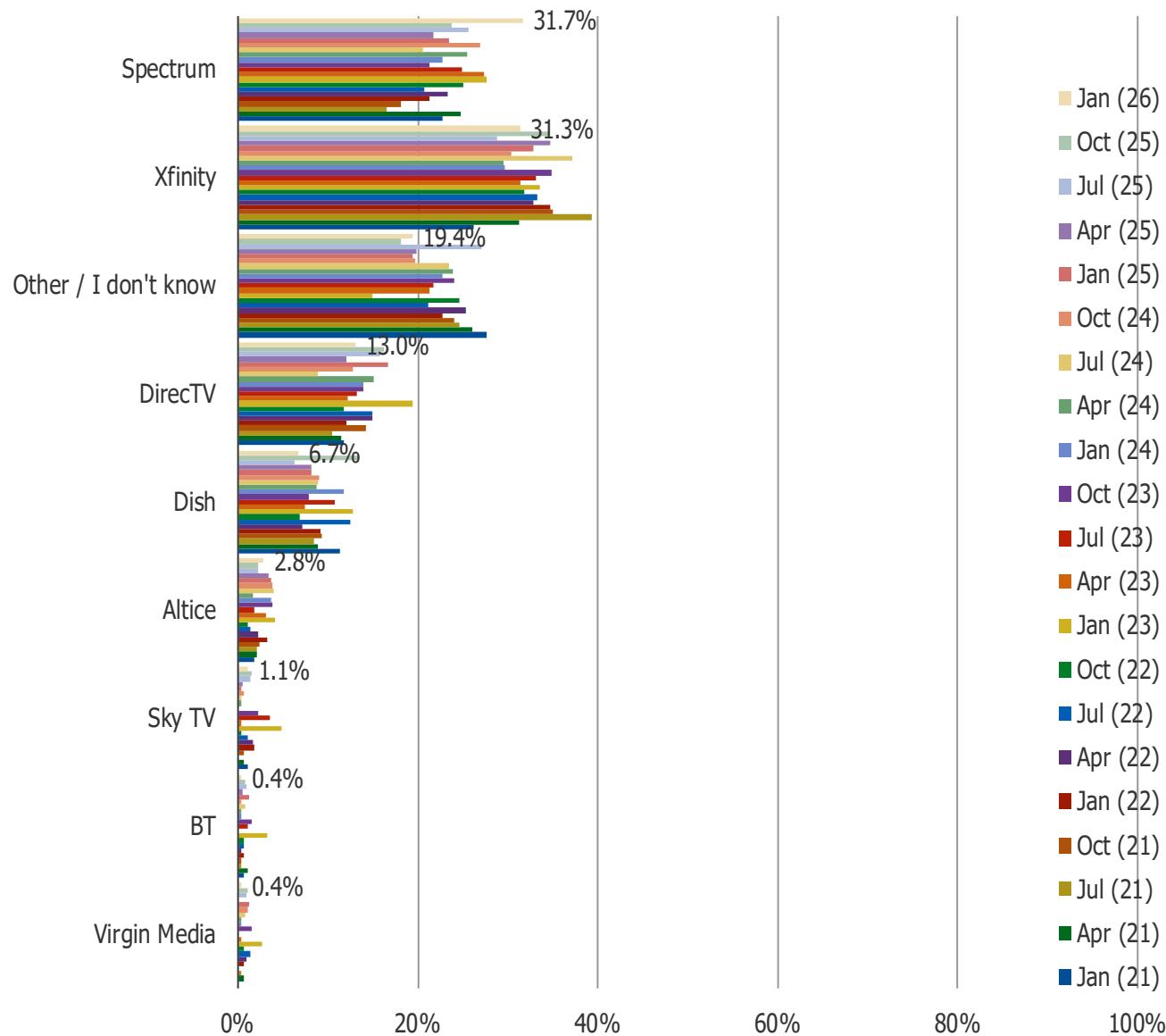
Posed to all respondents who own a smart TV.



N = 646

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

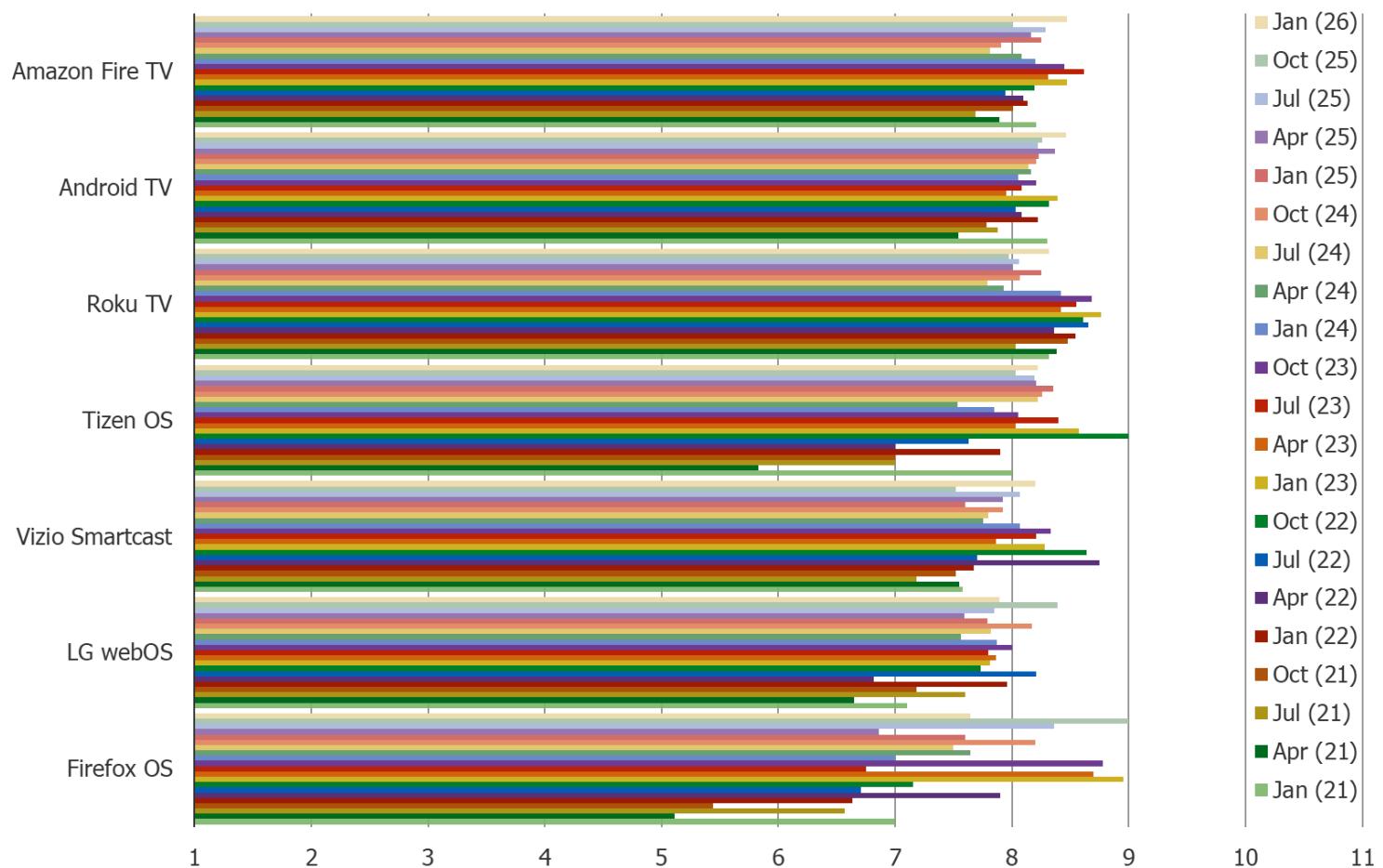
Posed to all respondents who use streaming devices.



N = 285

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

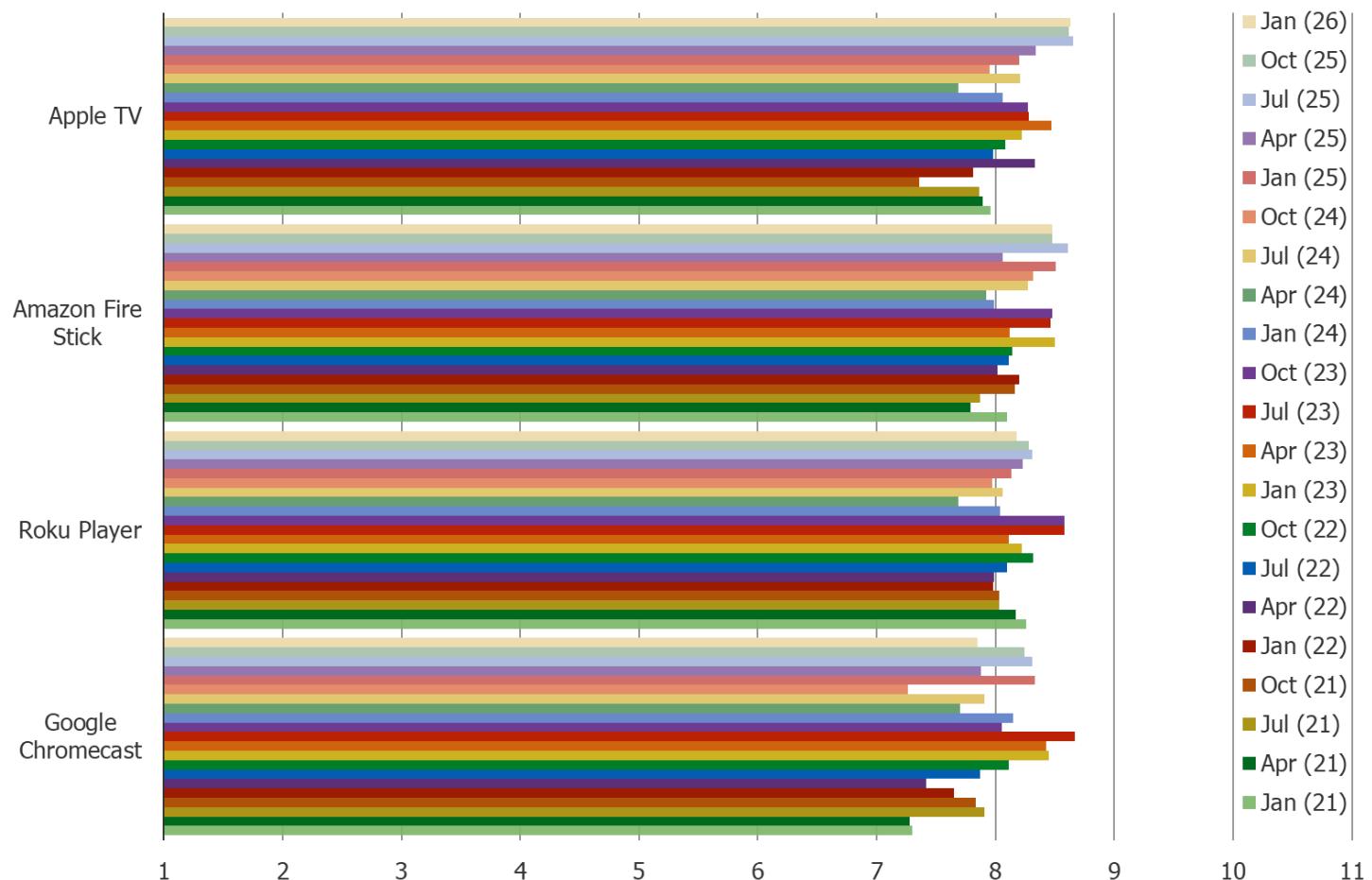
Posed to all respondents who own a smart TV and use each of the following.



*Combining all prior waves to achieve a larger N.

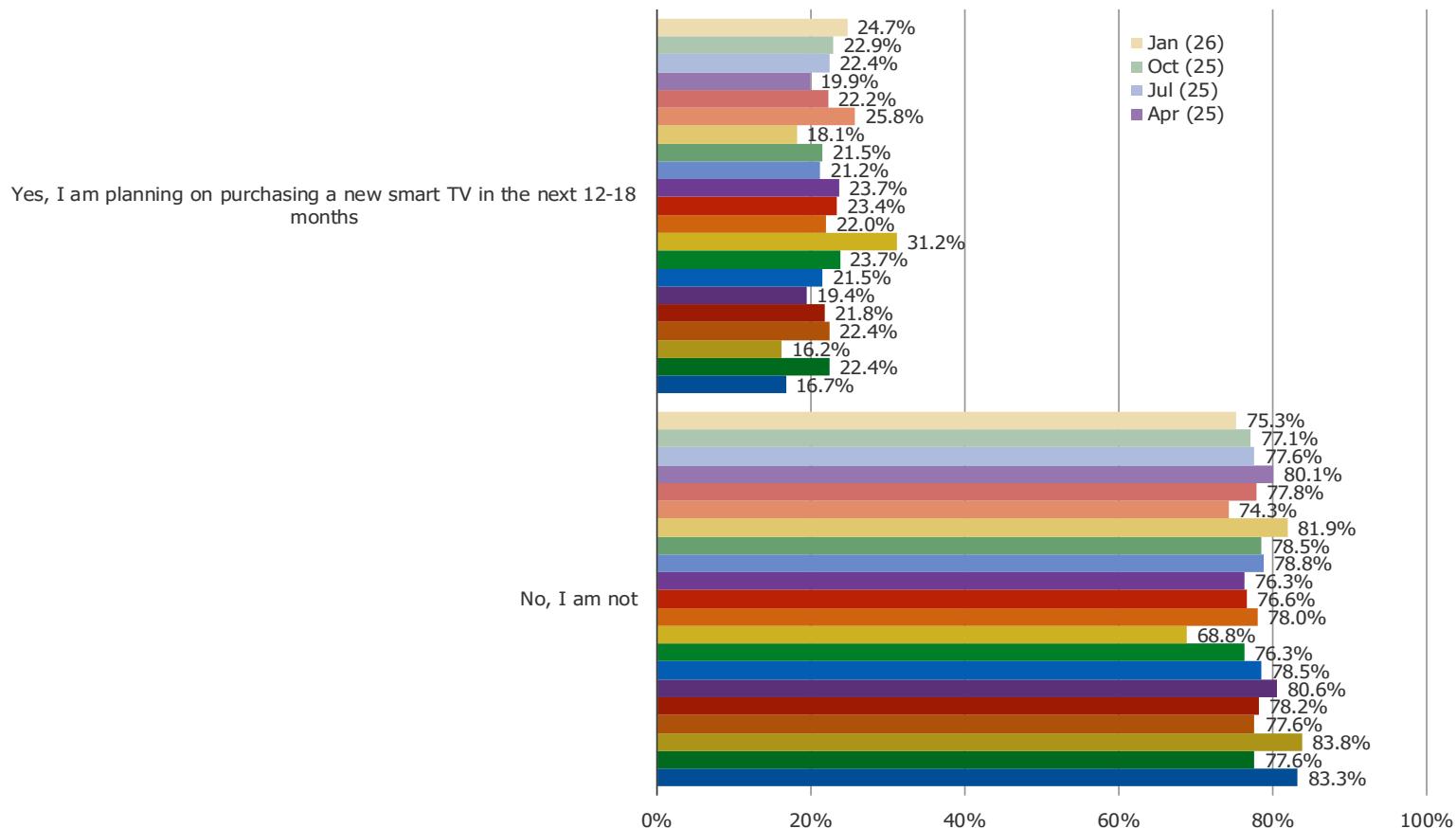
ON A SCALE OF 1-10, HOW SATISFIED ARE YOU WITH THE SOFTWARE INTERFACE ON YOUR STREAMING DEVICE?

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



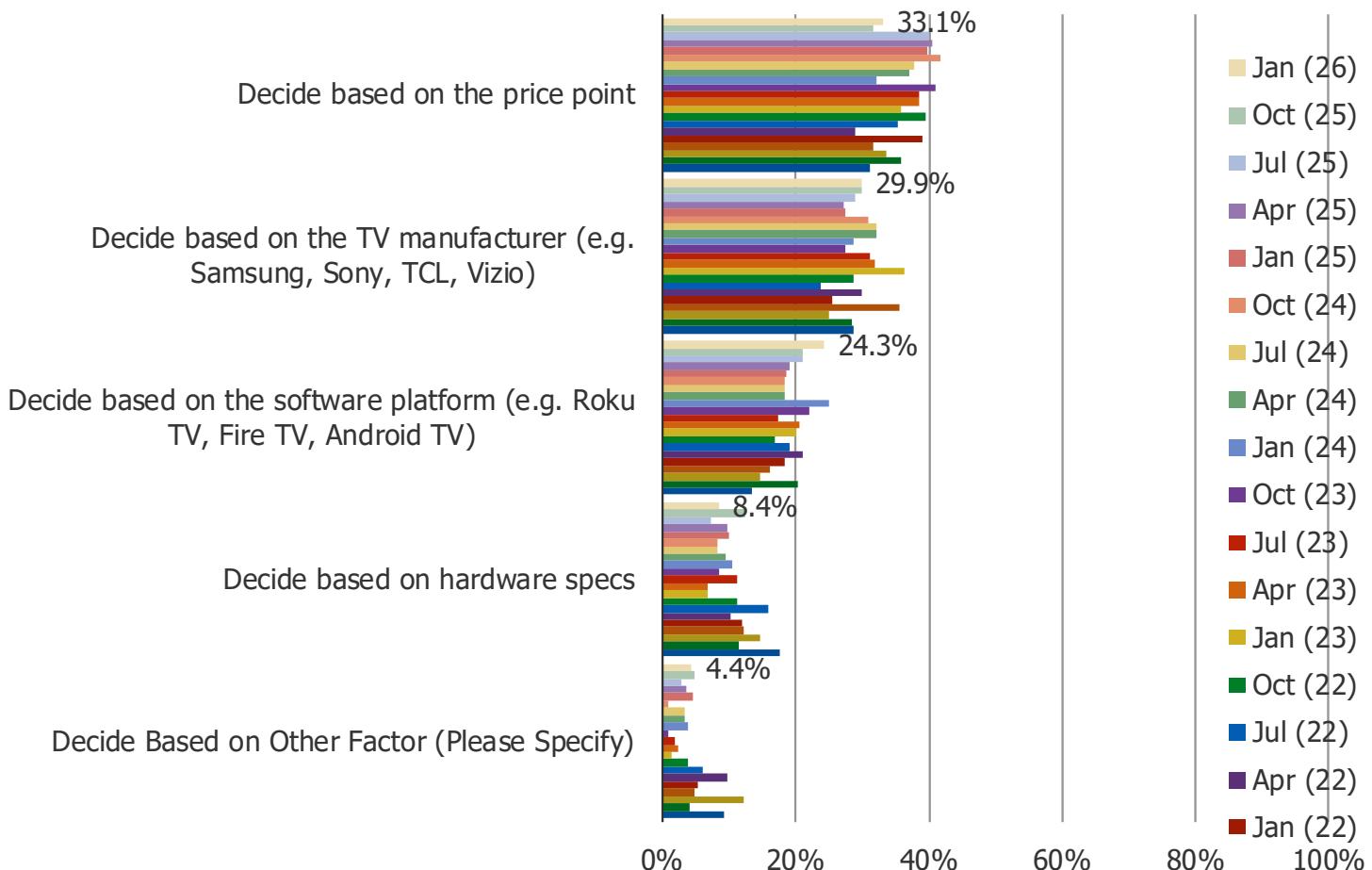
ARE YOU PLANNING ON PURCHASING A NEW SMART TV IN THE NEXT 12-18 MONTHS?

Posed to all respondents.



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

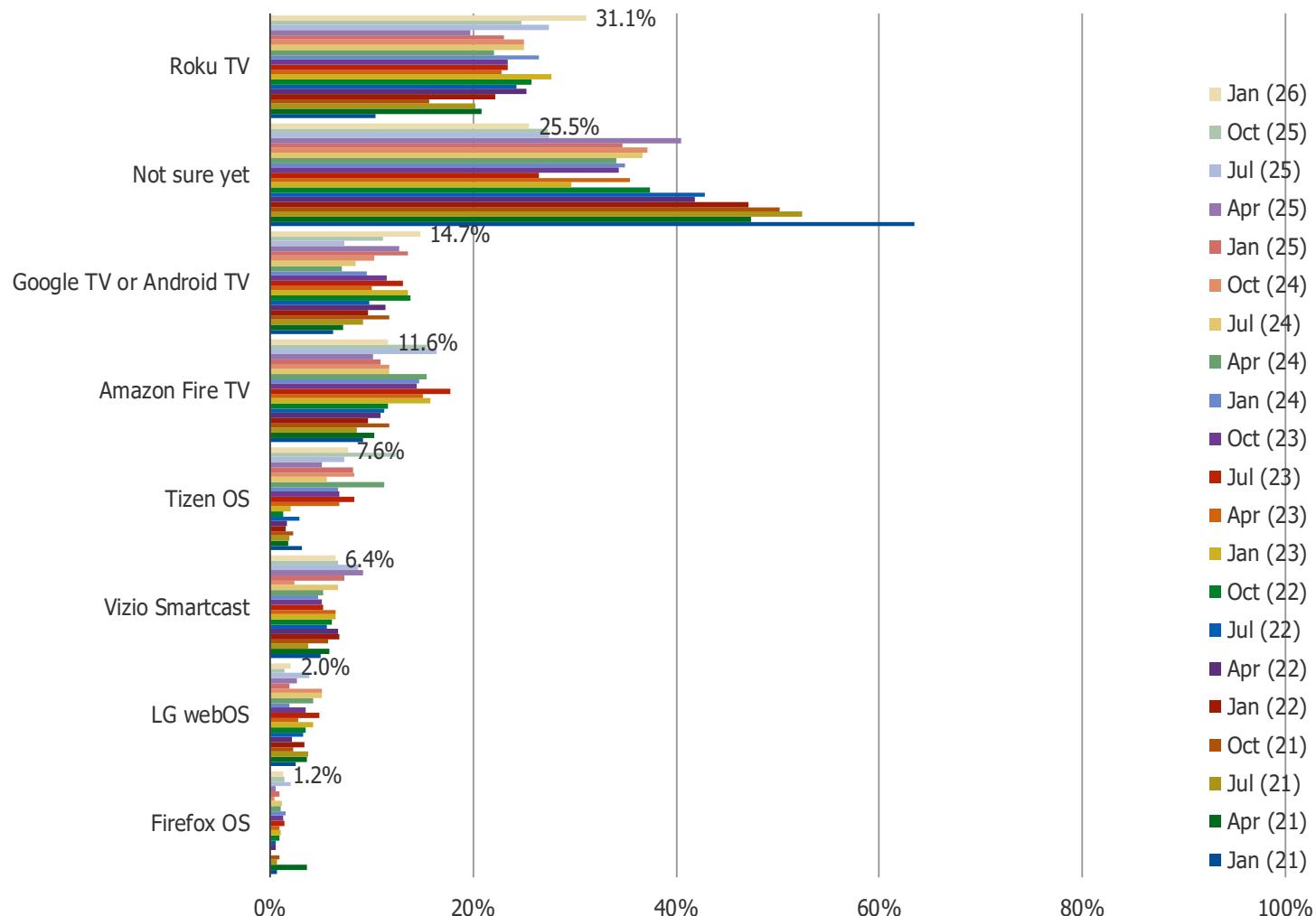
Posed to all respondents who have plans to purchase a smart TV in the next 12-18 months.



N = 252

WHICH SOFTWARE PLATFORM ARE YOU PLANNING TO GET?

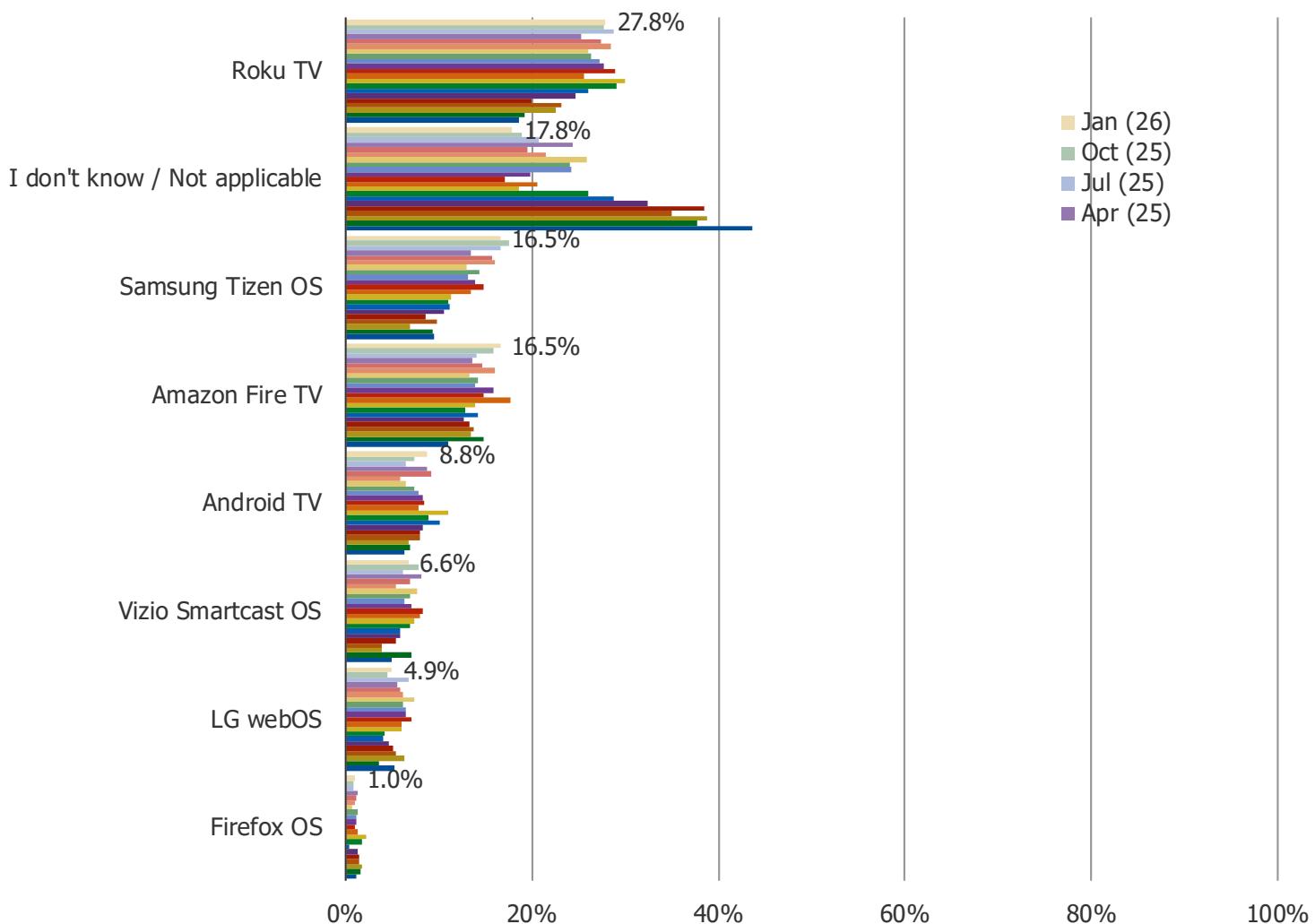
Posed to all respondents who have plans to purchase a smart TV in the next 12-18 months.



N = 252

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

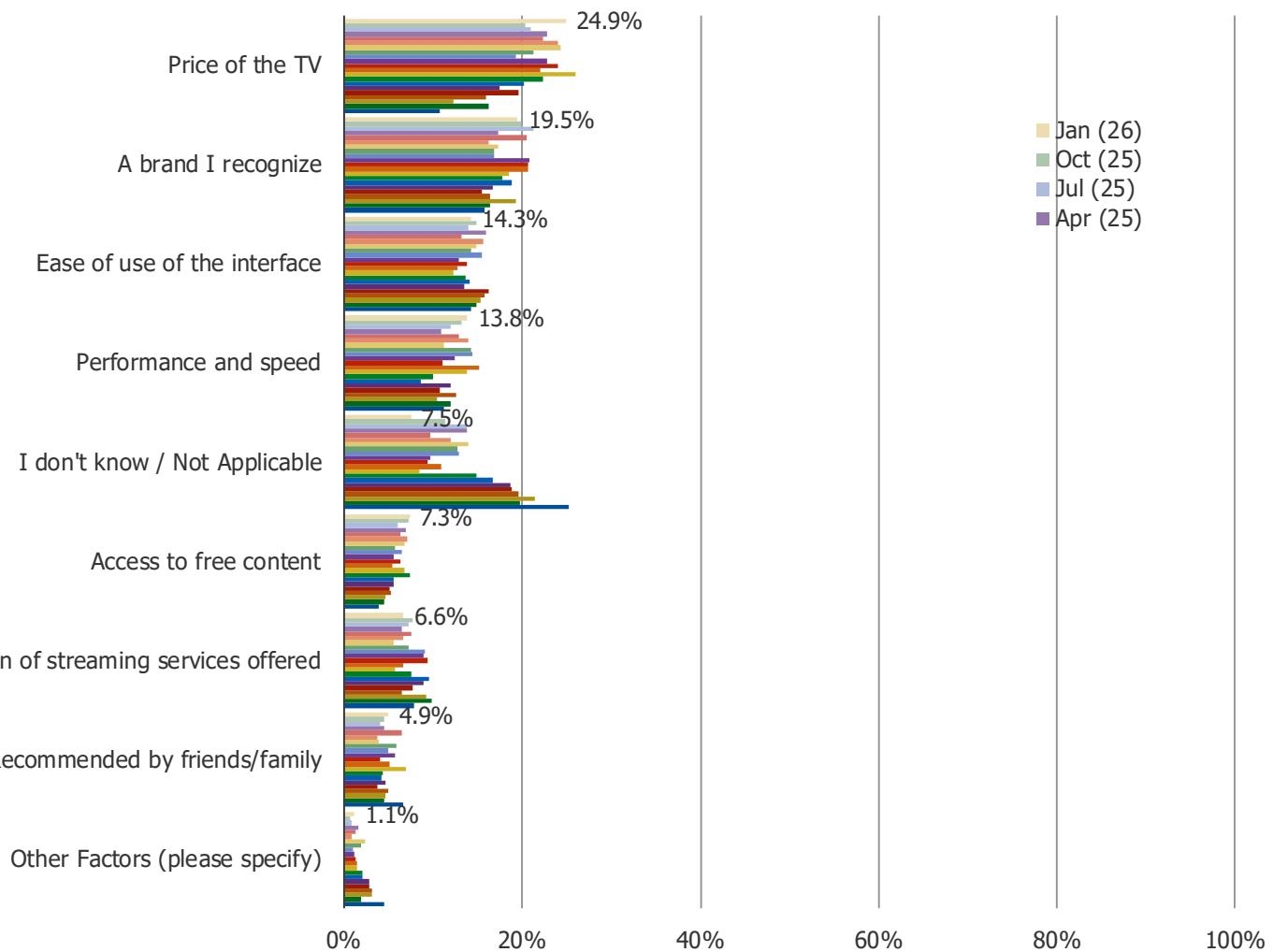
Posed to all respondents who either currently use a smart TV and/or have plans to purchase a smart TV in the next 12-18 months.



N = 710

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 = 710