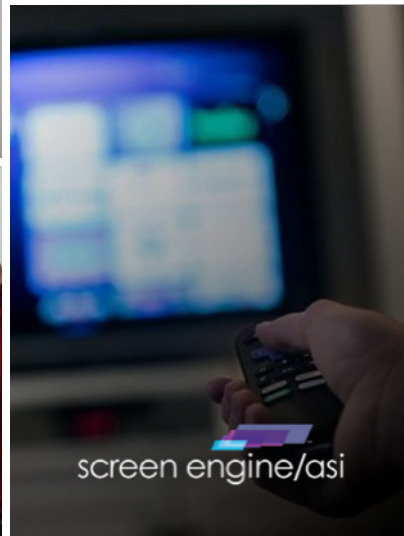
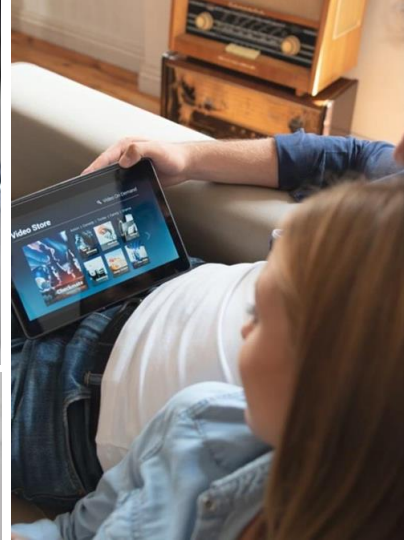


DEG Research TV & Connected Devices



Research Partner: Screen Engine

OCT-DEC 2023

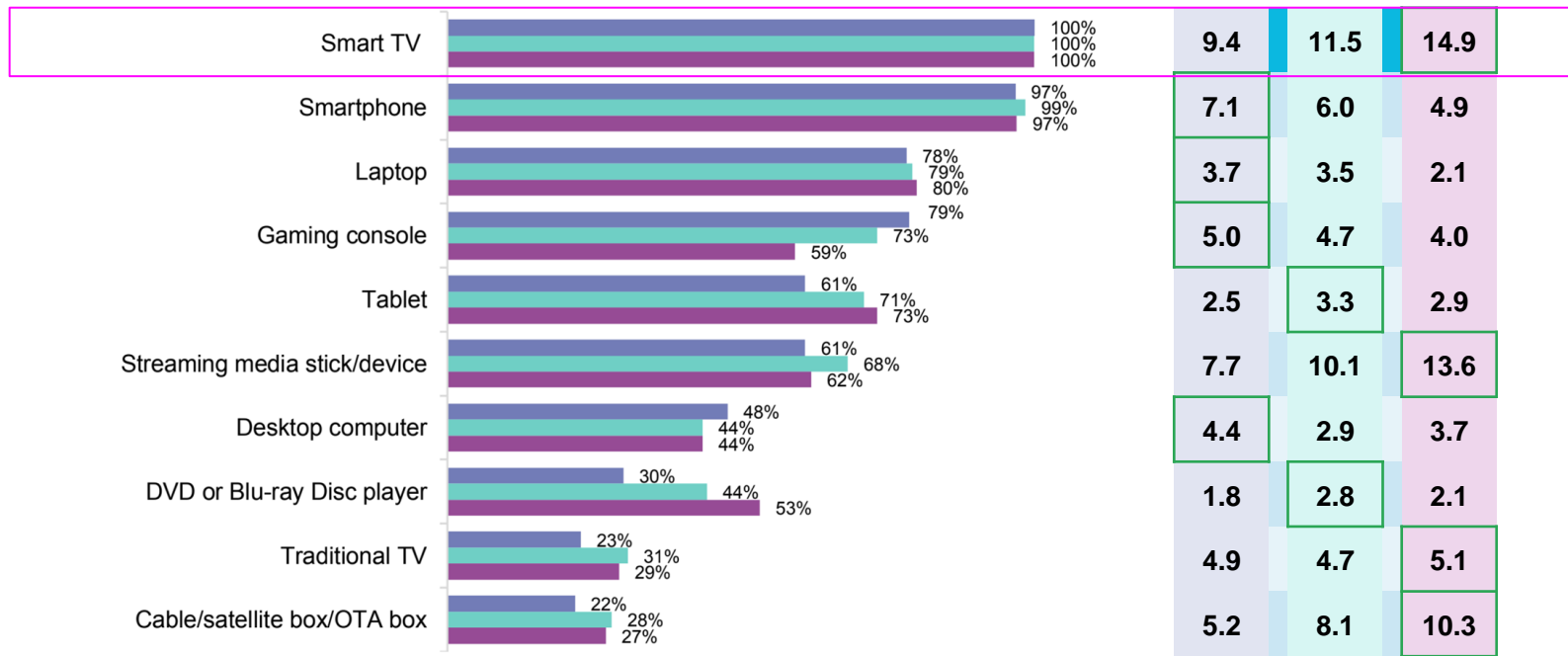
screen engine/asi

Smart TV usage reaches across all consumer segments. Gen X averages the most hours per week; Gen Z watches the least.

DEVICES OWNED AND USED BY GENERATION

= GEN Z (n=400) = MILLENNIALS (n=400) = GEN X (n=400)

AVERAGE HOURS/WEEK SPENT WATCHING TV/MOVIES*



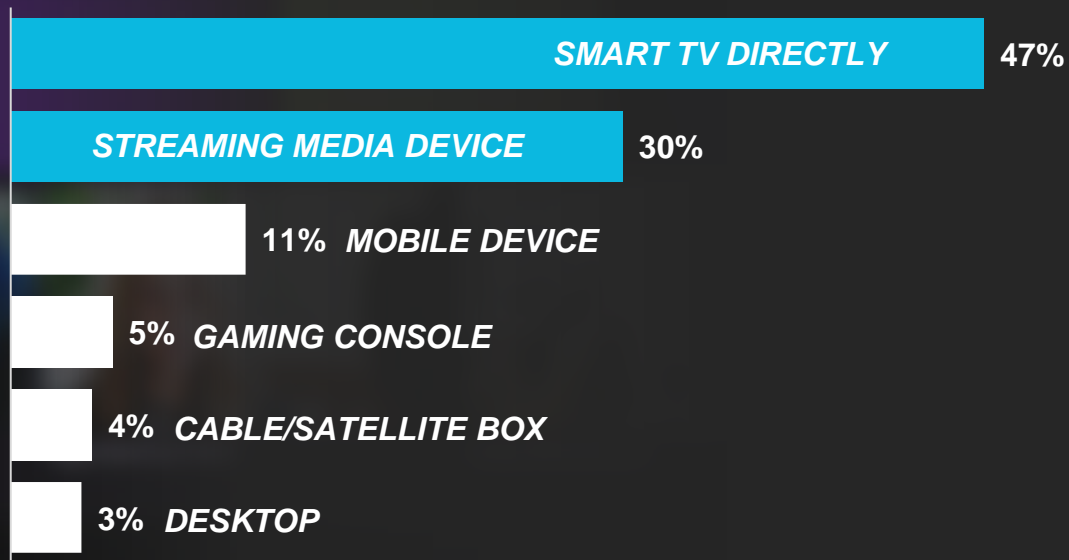
S_DEVICE_OWN. Which of the following devices do you and/or your household own?

S_DEVICE_HOURS. In a typical week, how many hours do you spend watching TV shows or movies on each of the devices you own? If you do not watch TV/movies on that device, please enter "0."

*Base varies by device ownership

Nearly half (47%) prefer to access content directly through their Smart TV OS. Just under 33% prefer using their other streaming devices connected to their TV

PREFERRED METHOD FOR ACCESSING TV/MOVIE STREAMING APPS/CONTENT



Respondents were very satisfied overall with their recent viewing journey, especially the ease & speed in finding content. **Search results & app load times had lower CSAT.**

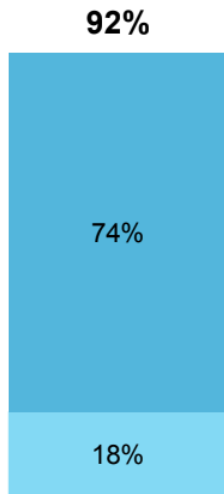
LAST VIEWING JOURNEY SATISFACTION

TOTAL (n=1,200)

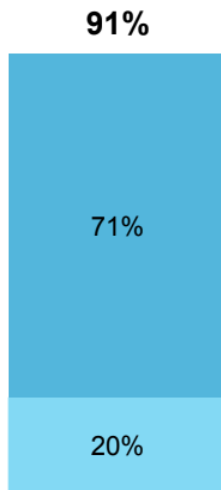
T2B – VERY/SOMEWHAT

= VERY SATISFIED

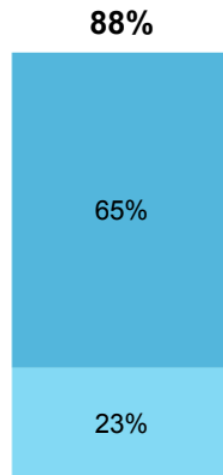
= SOMEWHAT SATISFIED



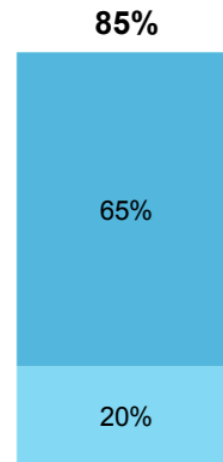
Ease of finding the movie/show



Length of time it took to find the movie/show



Search results when looking for the movie/show

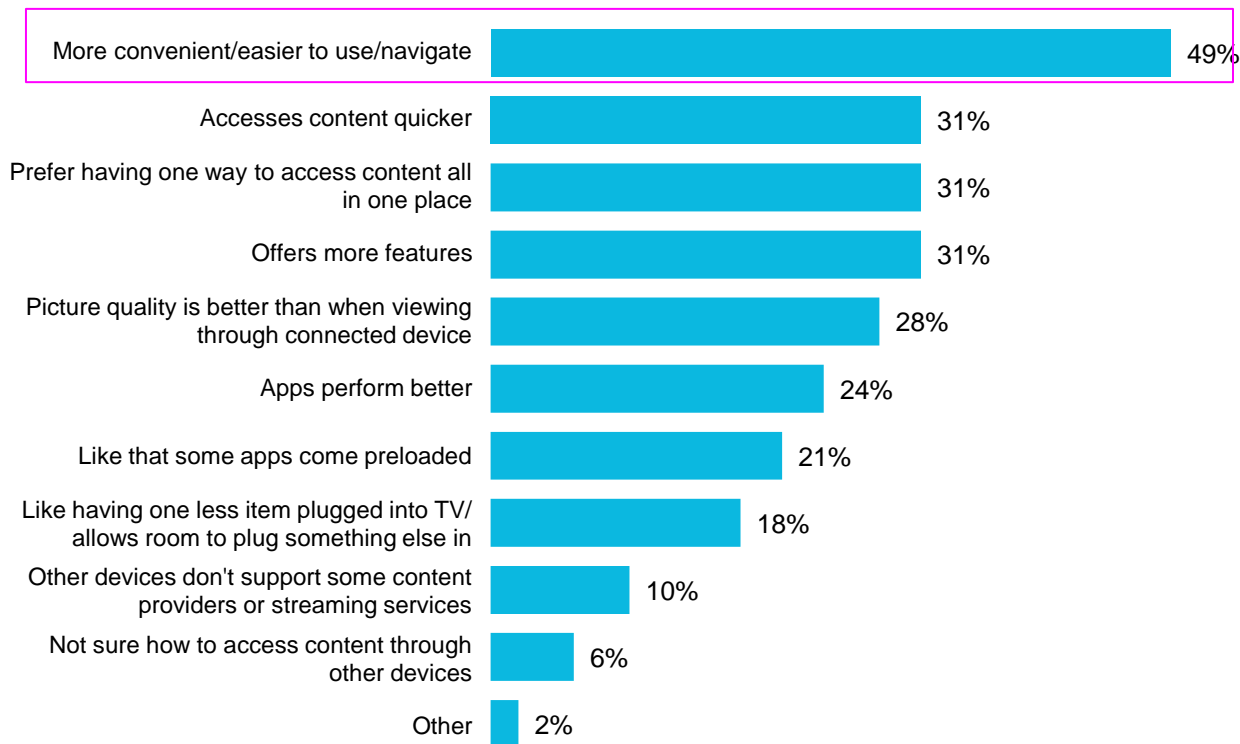


App load time

Of those who use their **Smart TV's OS** to access apps and content, most find it **easier to use or more convenient than using other connected devices.**

MOTIVATORS FOR ACCESSING CONTENT THROUGH SMART TV OS

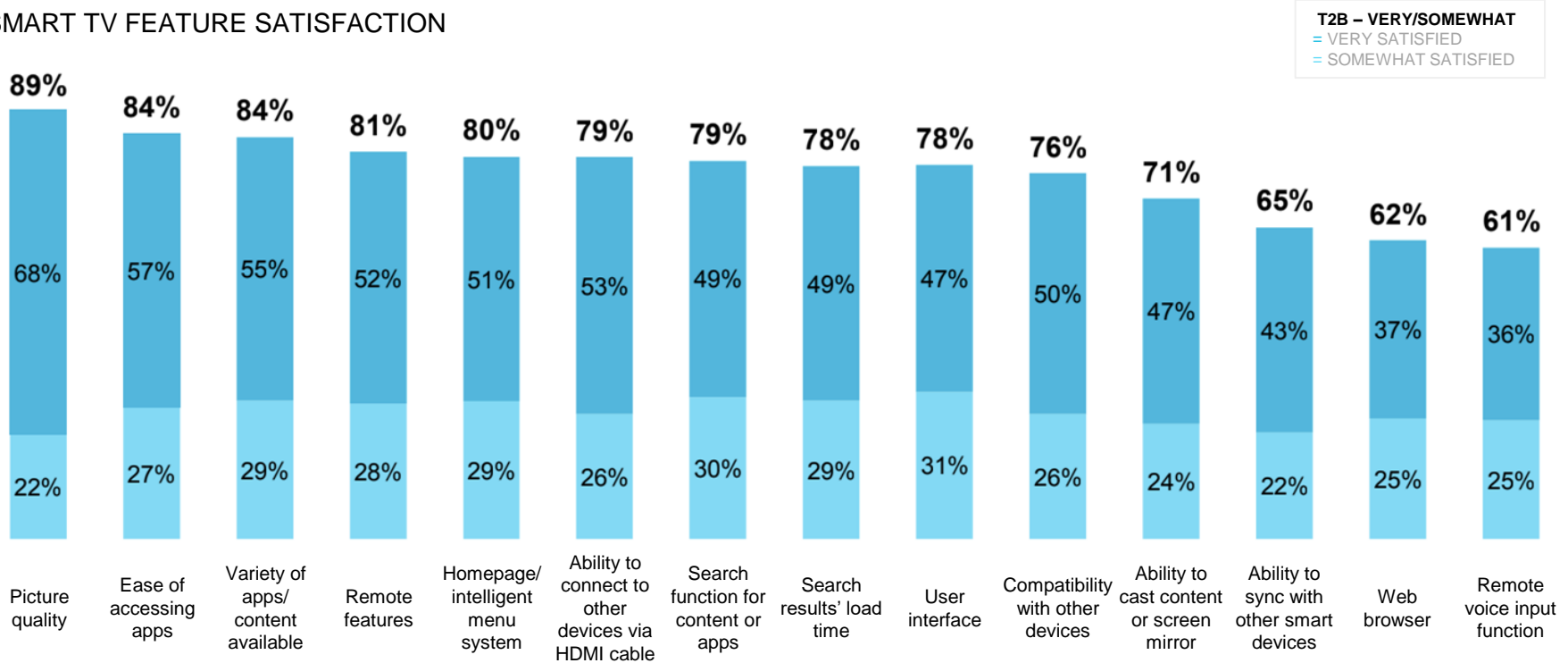
THOSE WHO USE THEIR SMART TV'S HOME SCREEN (n=983)



Gen X over-indexes for liking that some apps such as Samsung TV Plus or LG Channels come preinstalled on their Smart TV (27%).

Satisfaction with Smart TVs is high, especially for **picture quality**, **ease of accessing apps** and **variety of content**. Device-sync and voice input could be further improved.

SMART TV FEATURE SATISFACTION



Smart TV search issues center on **usability**: typing with remotes is hard and load times can be slow. Homepage issues = **navigation, visual appeal, & irrelevant content**.

WHY UNSATISFIED WITH SEARCH FUNCTION OR HOME PAGE ON SMART TV

THOSE NOT VERY OR NOT AT ALL SATISFIED*



SEARCH FUNCTION FOR CONTENT OR APPS

"It is **too slow trying to type** in searches with the remote. Also, just navigating to search is a **pain**." – M, Gen X

"It's **very annoying to type** out whatever I'm searching with the remote." – M, Gen Z

"There is **no voice search function** on my Smart TV. Therefore, it **takes a long time to type** in the search bar. Results **do not load quickly**." – F, Millennial

"I hate using the functions of the smart TV because **they take so long to load**. Every click takes **forever to register** and **forget having to type anything out, you'd be there all day** trying to input your password!" – F, Millennial



HOMEPAGE/INTELLIGENT MENU SYSTEM

"It's **not visually appealing**." – NB, Millennial

"It's **clunky and annoying**. Not clear at all." – M, Gen Z

"The **home page is too basic**, and it is **too hard to find apps and navigate** to get to where I want to watch something specific." – F, Millennial

"It **does not look appealing** and also **does not have things that I am interested** in most of the time." – M, Gen Z

TV_SEARCH_UNSAT_OE. You mentioned you were not satisfied with the search function for content or apps on your Smart TV. What makes you unsatisfied with this feature? (n=55*)

TV_HOME_UNSAT_OE. You mentioned you were not satisfied with your Smart TV's homepage/intelligent menu system. What makes you unsatisfied with this feature? (n=66*)

*Caution: small base size (n<100); results are directional

Paid streaming services are the most used apps on Smart TVs and other connected devices; AVOD/FAST apps are secondary. Music apps are also more frequently used than live TV.

TV APPS USED ON A WEEKLY BASIS

