

# Market Snapshot: Smart TVs & the User Experience

A Parks Associates Snapshot



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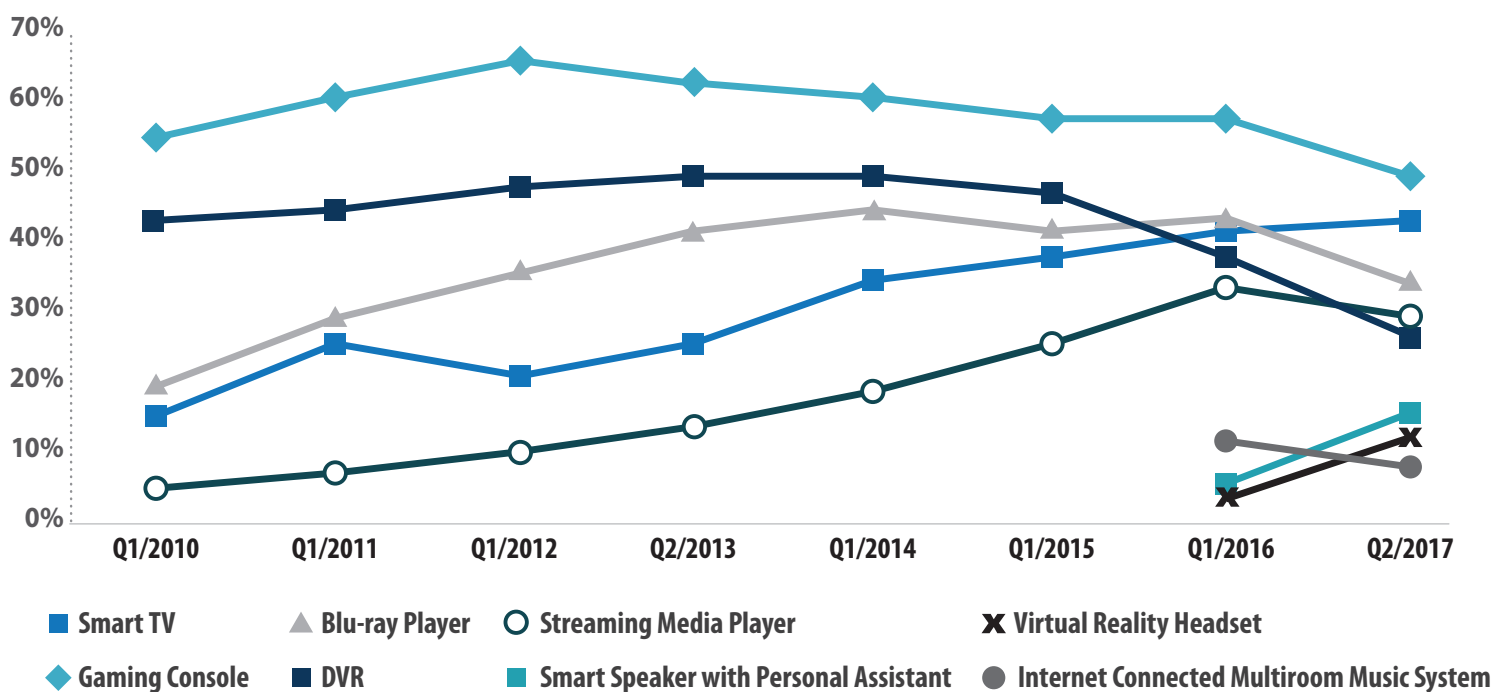
## Market Snapshot: Smart TVs & the User Experience

Streaming media player adoption and smart TV adoption experienced sustained growth until 2016 and are now showing signs of flattening. As a result of flattened or declining adoption in several product segments, device makers are emphasizing the user interface as a point of differentiation to win consumers.

The smart TV is the most used interface in the home for video viewing, creating a new opportunity for partnerships to enhance the consumer experience.

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**Ownership of Home Entertainment Devices (2010-2017)**  
U.S. Broadband Households



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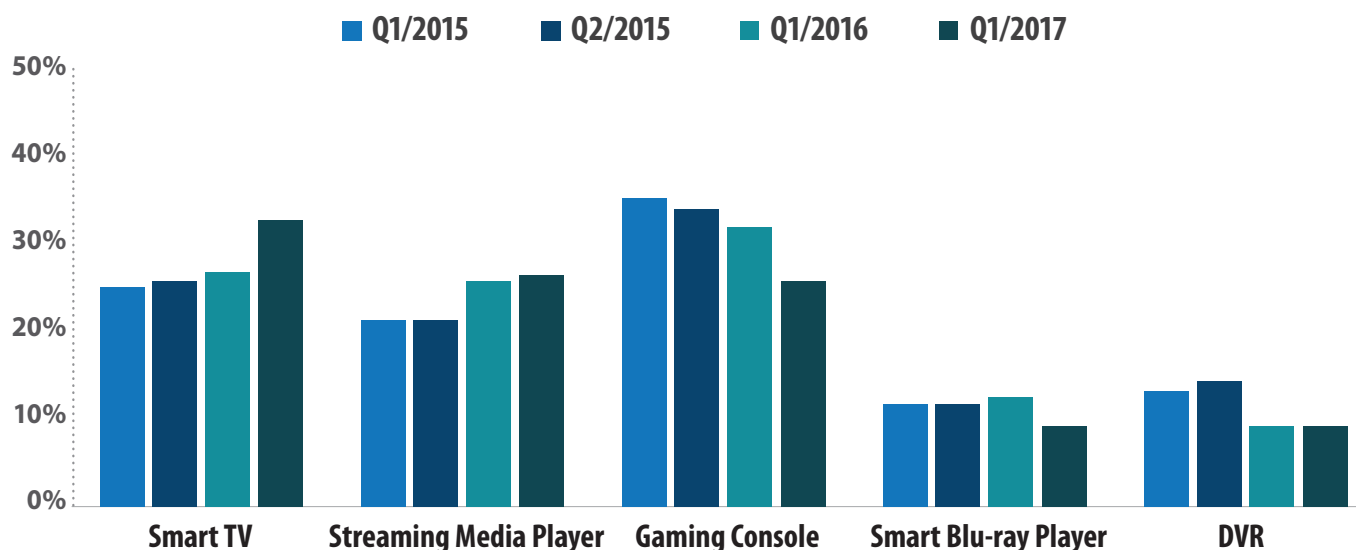
## Smart TVs and Streaming Media Players

The home entertainment device market is consolidating around the smart TV. Smart TVs are now the most commonly used platform for accessing online video content.

As smart TVs expand their digital content sources, the need for additional connected entertainment devices such as smart Blu-ray players declines. While streaming media players (SMPs) have seen strong growth in recent years, they too are susceptible to this trend in the long run.

### Most Commonly Used Connected Entertainment Platform for Online Video

Among U.S. Broadband Households with at Least One Home Video Entertainment Device Connected to the Internet



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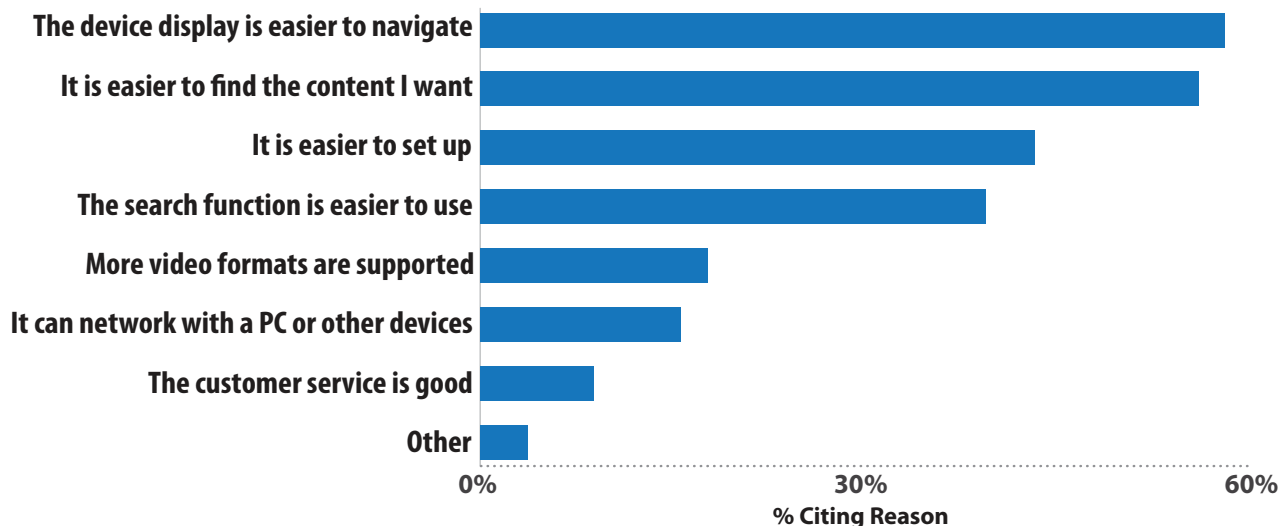
Consumers prioritize **ease of use** and a **single point of access** over desired content when determining the ideal user experience.

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## Reasons Why a Connected In-Home Entertainment Device is Perceived as Easier to Use

Among U.S. Broadband Households Choosing Their Connected Entertainment Device Due to its Ease-of-Use



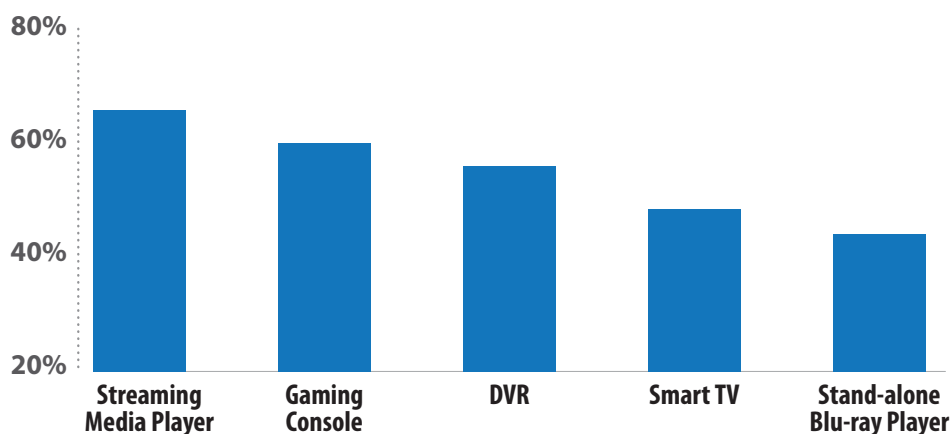
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In response, many SMP makers are adjusting their strategies to leverage their strength in user interface design, where they have valuable expertise in making it easy for users to find the content they want.

With the user interface as a strength, makers of streaming media players are teaming up with smart TV makers to close the gap on the user experience. Better navigation to content will cement the smart TV's role as the main connected entertainment platform in the home.

## Ease of Finding Content by Most Used CE Device

Among U.S. Broadband Households Selecting the Specified Connected Entertainment Device Due to its Ease-of-Use



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SMP makers are preparing for the future by investing in their software platforms so that they extend across device form factors.

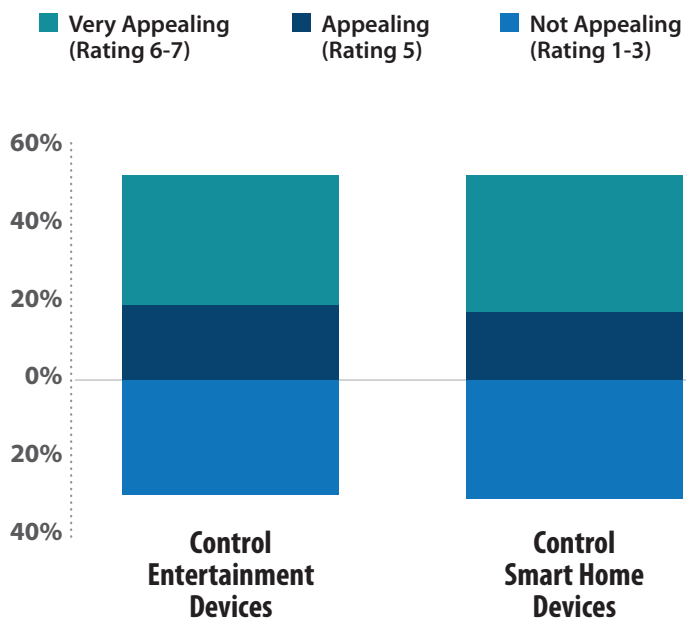
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## Smart TVs and Voice Controls

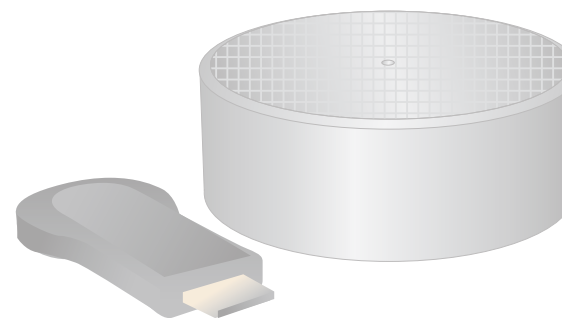
### Appeal of Smart Speaker with Personal Assistant to Control Other Devices

U.S. Broadband Households



Over half of U.S. broadband households find voice control appealing for entertainment and smart home devices.

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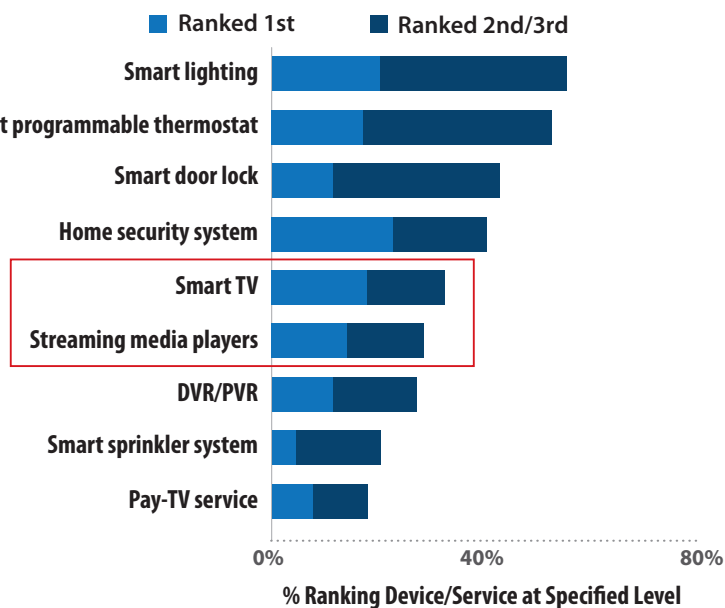
When asked to specify home devices and services they would most like to control with a personal assistant, most consumers ranked smart home devices at the top of the list.

Still, it is notable that **one-third of smart TV owners** selected that product among their top five devices they would most like to control with a personal assistant.

Voice control for TVs is still in early market stages and not heavily marketed by TV manufacturers. The growing use of voice assistants and voice-enabled remote controls, such as those from Comcast and Roku, is helping increase awareness for smart TV manufacturers.

### Preferred Smart Home Products for Personal Assistant Control

Device Owners or Service Subscribers Among U.S. Broadband Households



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**The company's expertise includes** the Internet of Things (IoT), digital media and platforms, entertainment and gaming, home networks, Internet and television services, digital health, mobile applications and services, support services, consumer apps, advanced advertising, consumer electronics, energy management, and home control systems and security.

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