



EVOLUTION OF THE TV SET

The New Television Gatekeepers

How TV Technology Shapes What We Find and Watch

JUN
2026



ENTERTAINMENT
RESEARCH

EXCERPT OF FINDINGS

What's the goal of this study?



Connected Home:

Tracks ownership of entertainment and smart devices—TVs, streamers, smartphones, tablets, speakers, and smart home tech—since 2019

Evolution of the TV Set:

How new TV features and smart TV apps are changing the way consumers find, choose, and watch video content

Gaming 360:

Explores the role of gaming in consumers' lives – what they play, how gaming influences their social connections with others, and the opportunities for game IP in television

AI & Entertainment:

Uncovers how viewers feel about AI's role in creating, distributing, and recommending entertainment content



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INTRODUCTION

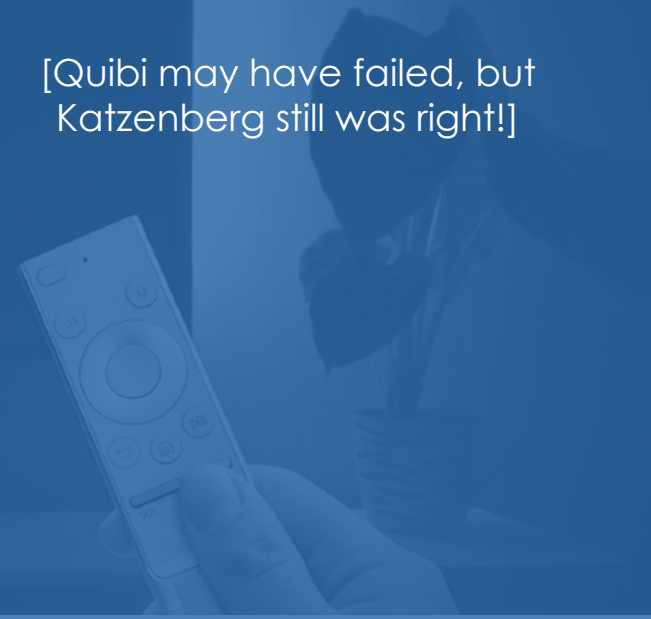
The Game has Changed

- Hollywood Competition has shifted from creating the best content to building TV platforms and operating systems that best connect viewers with programs.

*"Content is the kingmaker,
it's not the king.
The king is the platform."*

Jeffrey Katzenberg

[Quibi may have failed, but
Katzenberg still was right!]



Competition for Audiences Has Shifted

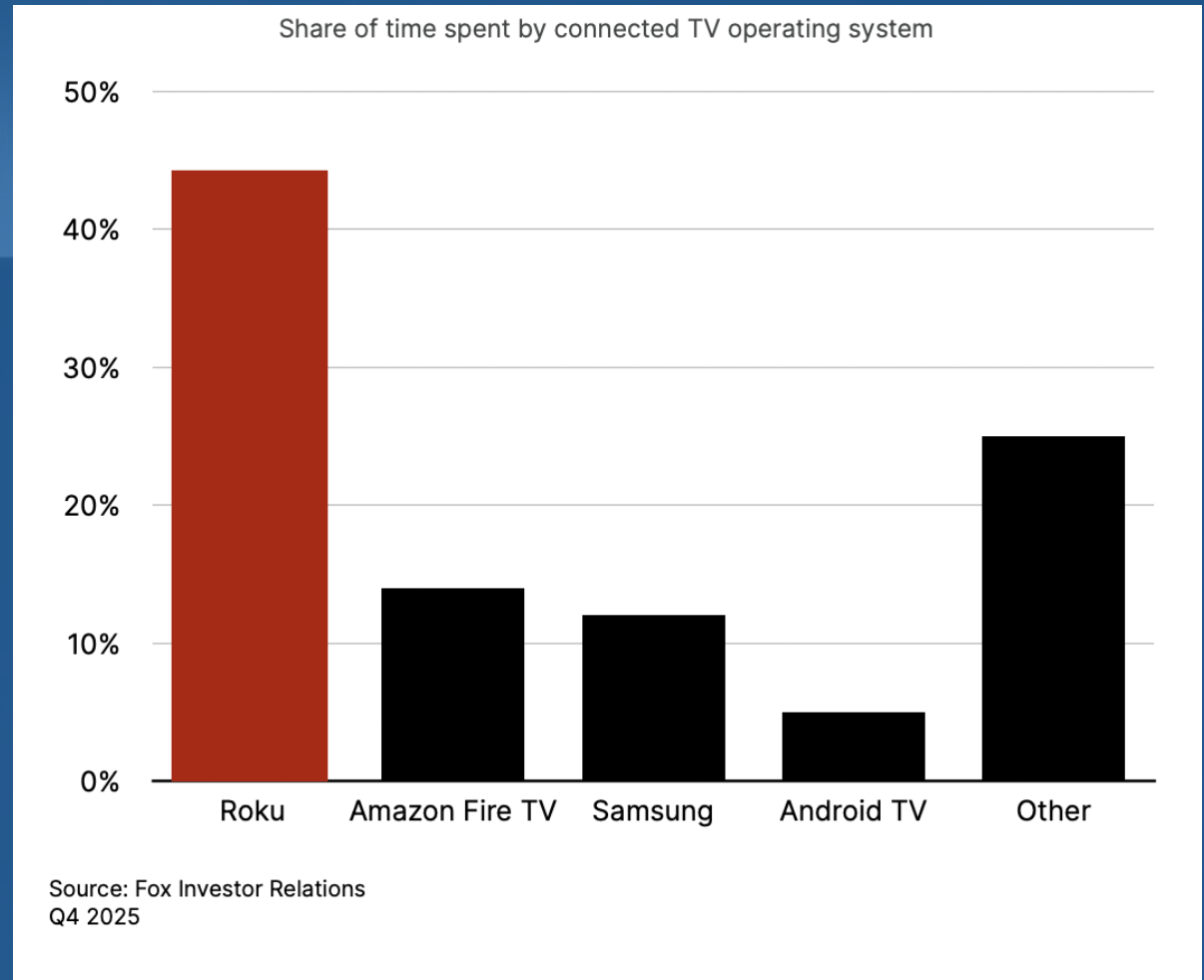
- The fragmented streaming landscape has increased demand for faster, easier ways to find the shows viewers want to watch



Roku is Winning

- Legacy TV manufacturers like Samsung are being outpaced by TV platforms from Roku and Amazon FireTV that gatekeep content

Roku Leads Across TV OS



We set out to find out what changed:

- Who is growing and who is not?
- For the winners, what's giving them the advantage?
- What features are valued?
- How does that improve the experience?
- How do viewers value that experience?
- Will that value impact buying decisions?
- Does AI potentially play a role?



WE CONDUCTED AN ONLINE SURVEY AMONG 2,500 U.S. CONSUMERS



- Age 16-74
- U.S. census balanced
- Data collected in May 2025
- All interviews conducted in English





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KEY TAKEAWAYS



#1

Smart TVs are the default viewing environment, making up the majority of home TVs that directly stream video using built-in streaming capabilities

#2

TV operating systems are more important than hardware, with Roku & FireTV OS surpassing share of Samsung and LG TV set brands on “most-used” TV sets

#3

The home screen, powered by the TV operating system, serves as television's primary gateway, directing viewers toward specific apps, recommendations, and featured content

#4

Discovery is a key competitive battleground, as viewers prioritize finding content quickly and easily over personalized recommendations or what's trending

#5

Recommendations matter, but platform influence varies: Fire TV, Apple TV, Android TV and Roku users are more likely to watch home screen recommendations than Samsung or LG OS users

#6

Viewers want AI TV features that reduce friction and help them find content faster, deliver better recommendations and simplify navigation across services

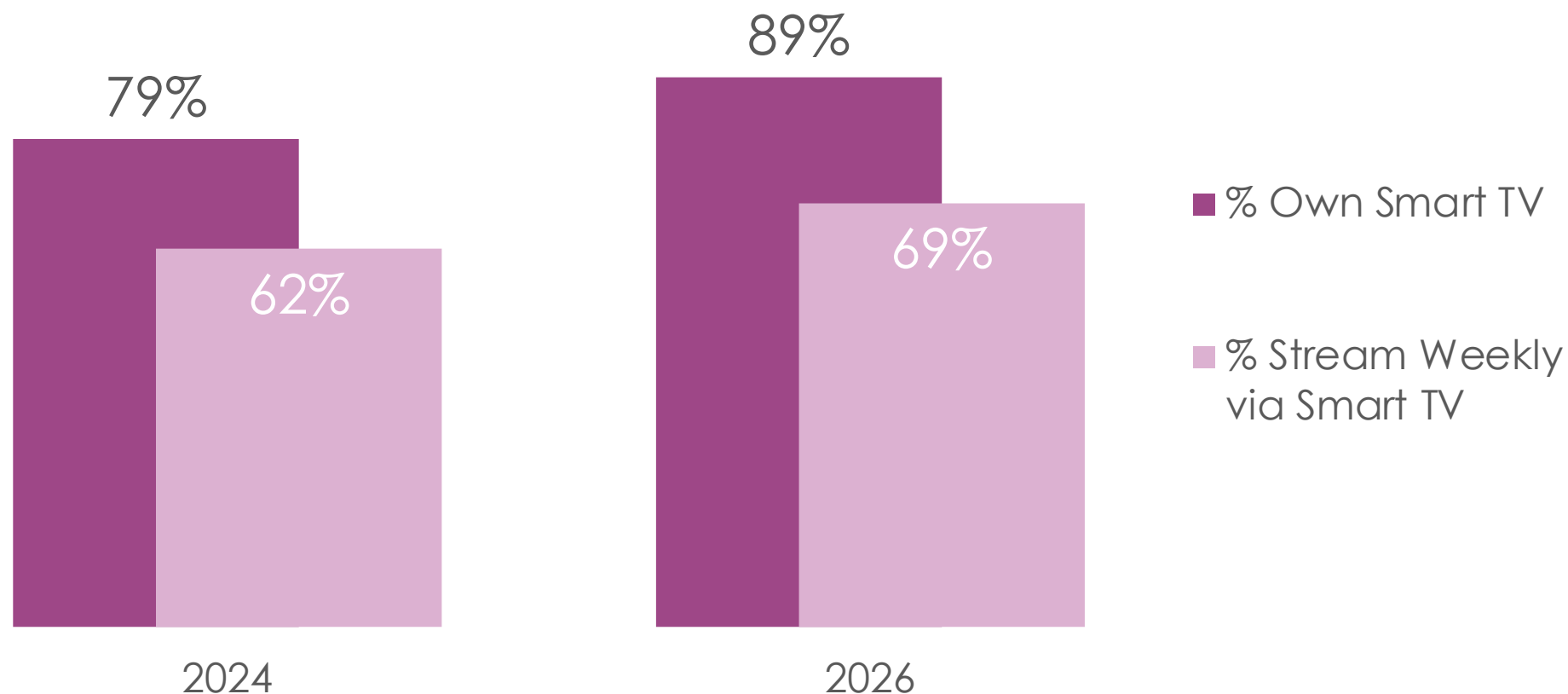
#7

The new TV setup process is a critical distribution opportunity, with more than half of viewers installing new apps, and much fewer adding apps later

SMART TVS ARE THE DEFAULT AND CONTINUE TO GROW IN OWNERSHIP AND USAGE



Smart TV Ownership & Streaming Usage
- TV HH -



SOURCE: 2026 HUB CONNECTED HOME STUDY -BASE: TV HH – 2024 (n=4,928), 2026 (n=2,622)

Q105a. Many digital TV sets come with a built-in capability to connect to the Internet to allow users to stream video – these are often called “smart TVs”. How many of your TV sets are smart TVs with this capability, even if it is not used by anyone?

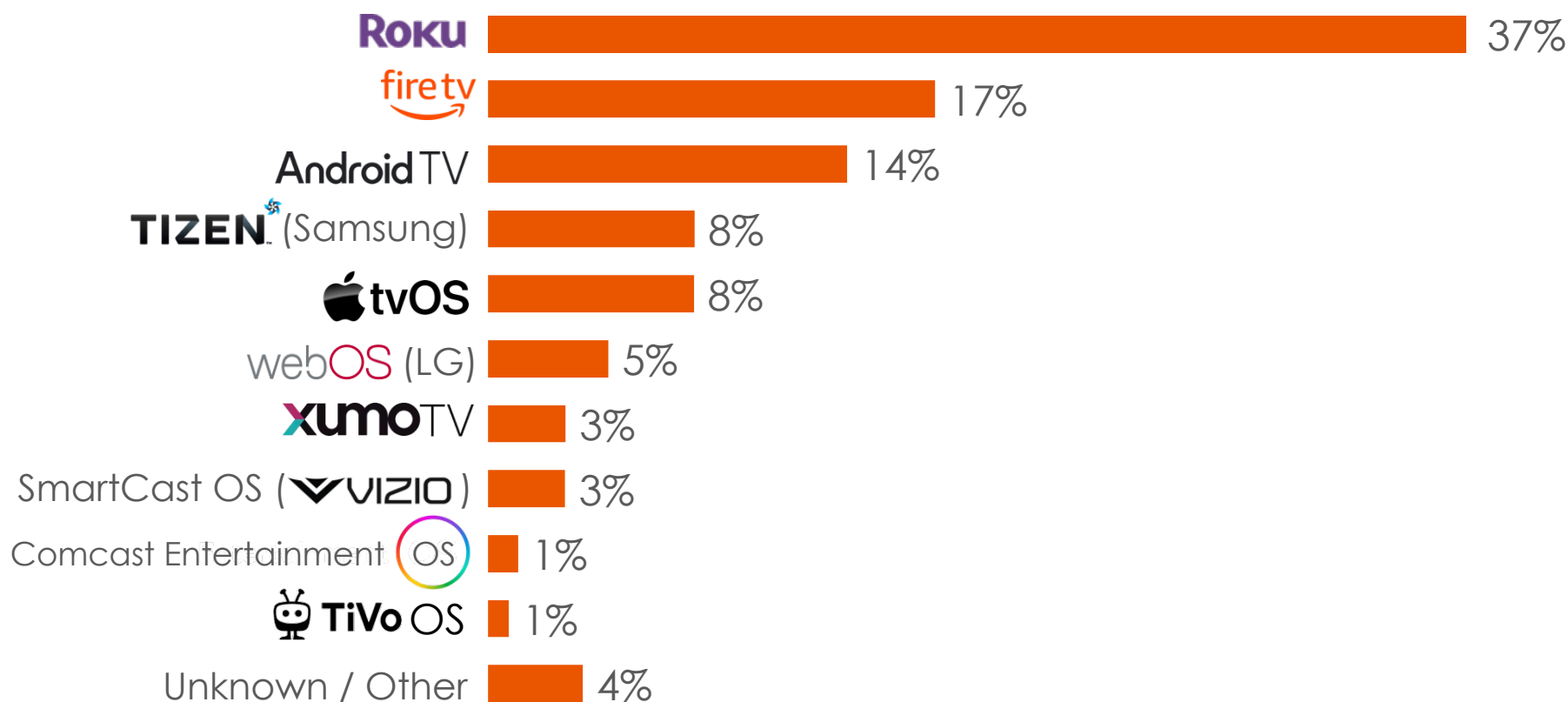
Q123. And about how often is a smart TV in your home used to stream movies or TV shows?

TV OSs ARE MORE IMPORTANT THAN HARDWARE, WITH ROKU & FIRETV OS SURPASSING SAMSUNG AND LG



What **smart TV** OR **streaming media player** OS's does your most used TV set have?

- Among HHs that stream monthly+ via smart TV or SMP -



BASE: TV HHs THAT STREAM AT LEAST MONTHLY USING A SMART TV OR A STREAMING MEDIA PLAYER – 2026 (n=2,200)

Q11c. What brand is your most used set?

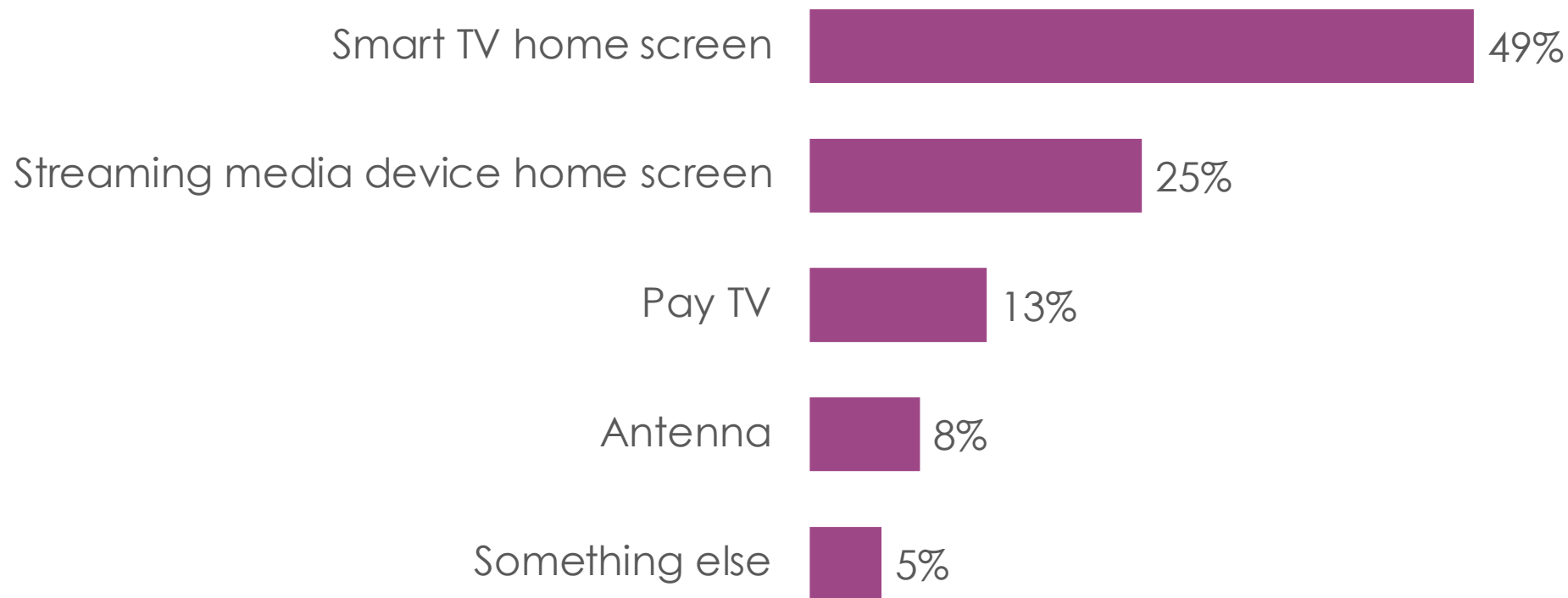
Q22_2026. Does your most used set, located in [room] have Roku, Fire TV, Android TV or Xumo TV services built-in to the set?

Q33_2026. Do you have a streaming media player attached to your most used set, located in [room] to watch streaming services?

THE SMART TV HOME SCREEN WITH APPS IS THE FRONT DOOR TO VIEWING FOR MOST USERS



What's the first thing you see when you turn on your most-used TV?

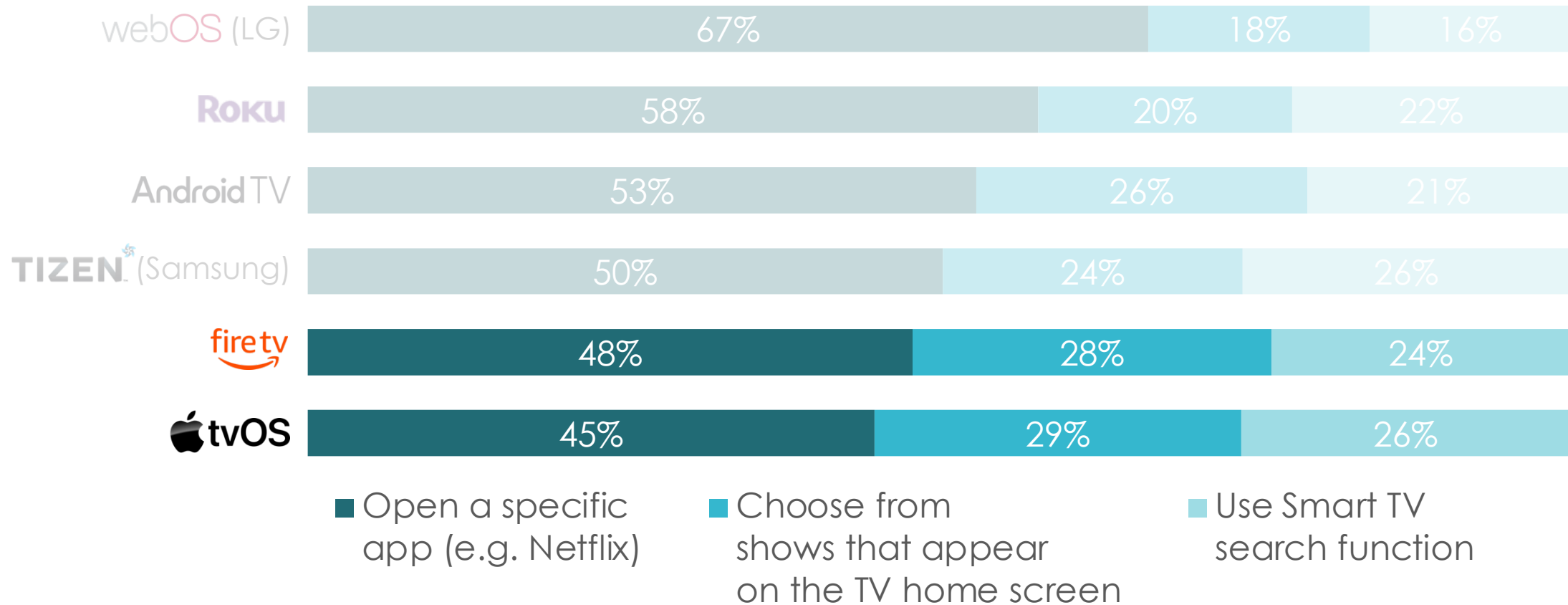


FIRE TV AND APPLE TV USERS ARE MORE LIKELY TO BE SWAYED BY SHOWS BEING PROMOTED ON THE TV HOME SCREEN



When you're looking for something to watch do you typically...?

[By main TV OS]



BASE: STREAMS ON TV – MAIN TV OPERATING SYSTEM IS: ROKU OS (n=764), TIZEN OS (n=172), FIRETV OS (n=354), WEBOS (n=106), ANDROID OS (n=301), APPLE TV (n=147)
Q24c_New. Imagine you turned your TV on and you are looking at the home screen, deciding what to watch. Where do you typically look first?

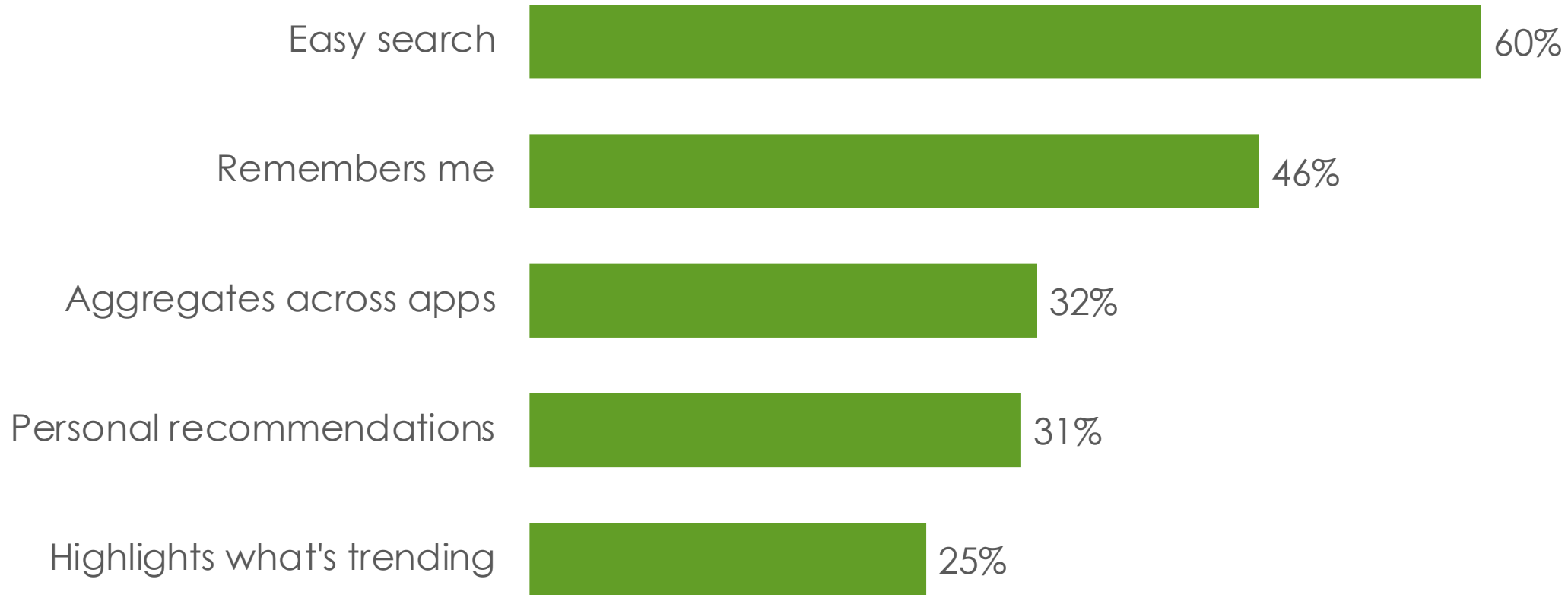
NOTE: chart shows OSs with base of n=75+

YOUNGER VIEWERS CARE MORE ABOUT BEING REMEMBERED AND RECOMMENDATIONS



How important is each when trying to find something to watch?

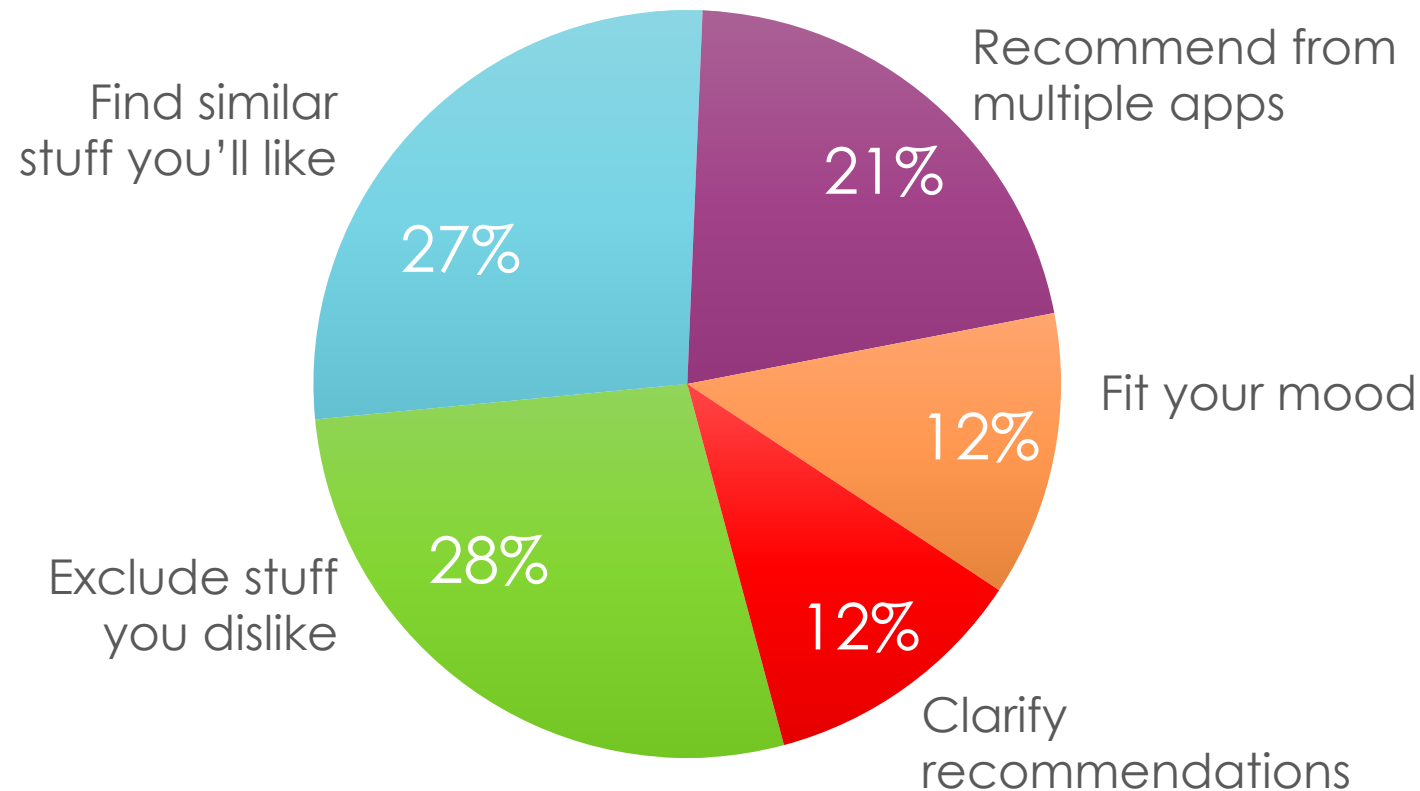
- Any smart TV used for streaming –
[% "very important"]



VIEWERS ARE MOST INTERESTED IN AI-POWERED FEATURES THAT REDUCE DISCOVERY FRICTION



What single AI-powered TV feature would be most valuable to you?
- Smart TV used for streaming -



BASE: ANY SMART TV USED FOR STREAMING – 2026 (n=2,105)
Q24g-2026. Which of the following AI-powered features on your TV would be most valuable to you?

THE NEW TV SETUP PROCESS IS A CRITICAL DISTRIBUTION OPPORTUNITY



51%

Added apps when first
setting up their TV

56%

"Rarely" or "Never"
add more apps after first
setting up their TV

The background is a solid red color with a faint, semi-transparent image of a living room. In the center, there is a large television set. To the right of the TV, a person is visible from the chest up, holding a remote control. The overall aesthetic is modern and minimalist.

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A hand is raised in the air, palm facing forward, with fingers slightly spread. The hand is wearing a watch with a dark strap and a rectangular face. The background is a blurred crowd of people at an event, with warm, out-of-focus lights creating a bokeh effect. The overall tone is dark and atmospheric.

QUESTIONS?

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