

SONOS

LUTH
RESEARCH

SOUNDS OF THE CONSUMER:

What Sonos discovered
through path to
purchase research



SONOS INITIATIVES

1



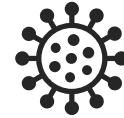
Update company view of the consumer audio journey

2



Illuminate insights related to digital, physical, and other channels for research and shopping, which will drive actionable competitive advantage

3



Understand how COVID has impacted consumer behavior, preferences, attitudes and needs

WHAT WE'LL DISCUSS

Benefits of a multi-phase approach to best understand the shopper journey

The role sites of interest have as essential touchpoints

What the in-store landscape looks like for the future



ABOUT LUTH



1977

Data Collection Services
Founded in San Diego, CA



1999

Online Panel
Developed



2009

Passive Digital Tracking with
ZQ Intelligence



2022

Thought Leader in
Path to Purchase

ABOUT SONOS



2002

An idea was born. The next great startup involving music and technology was created.



2005

First products shipped to customers



2007

Sonos integrated with smartphones



2009

Smart speakers were released and Sonos continues to stay on the cutting edge in the music space



2013

Sonos enters the home theater category with the launch of Playbar



2019

Sonos enters the portables category with the launch of Move

RESEARCH APPROACH

Why?



**SINGLE
SOURCE**

01

**QUALITATIVE
1x1**

In-depth
understanding

02

**ONLINE
SURVEYS**

Understand
Context

03

**PASSIVE TRACKING
ON DEVICES**

Behavior
speaks louder

ABOUT THE TECHNOLOGY





**BENEFITS OF MULTI-
PHASE APPROACH
TO THE RESEARCH**

**Digital
Insights**

**Qualitative
Insights**

**Quantitative
Insights**



Speaker purchasers are most often using their devices in the family or living room

WHERE DEVICE IS USED

Family/
Living Room

65%



Main Bedroom

26%



Kitchen

25%



“

My speaker is in the Family Room. I know we can pick a different place. We just haven't had the need. **We listen to it when we're cleaning... we have kids and we'll have a dance party downstairs, or we'll put on some smooth R&B if my husband and I are sitting by the fireplace.**

-Angie, US

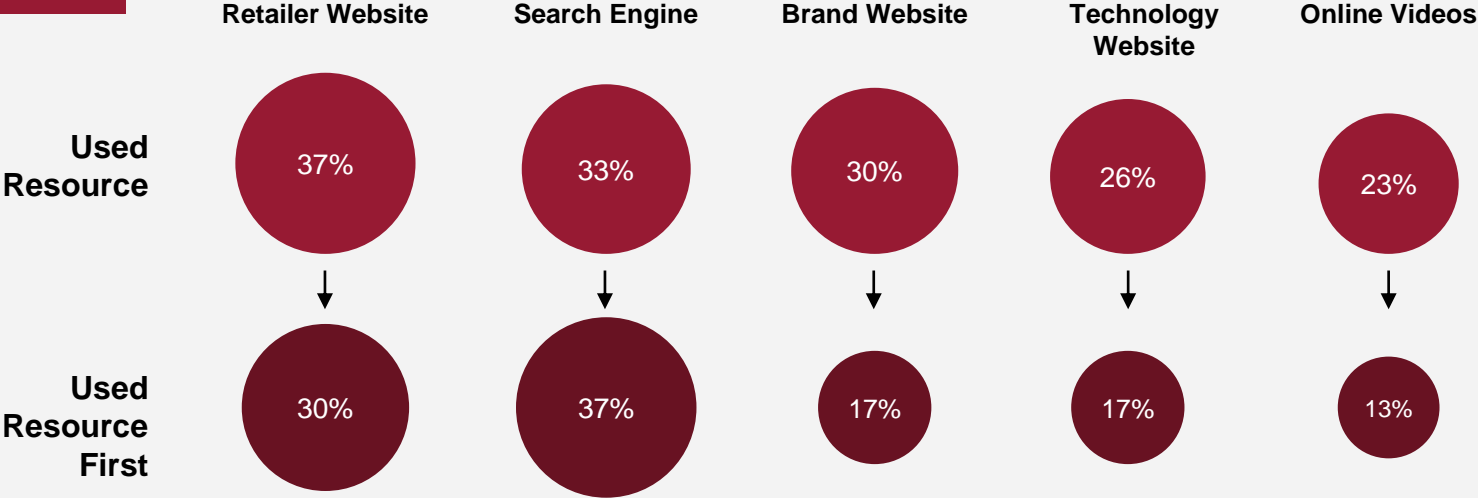
A woman with dark hair, wearing a blue sleeveless dress over a long-sleeved brown top, stands on a wooden patio. She is looking down at her hands. In the foreground, a wooden table is set with a blue tablecloth, white plates, glasses, and folded orange napkins. A dark grey thermal carafe is on the table. The background shows green foliage and a white railing.

ESSENTIAL TOUCHPOINTS

IN THE SHOPPER JOURNEY

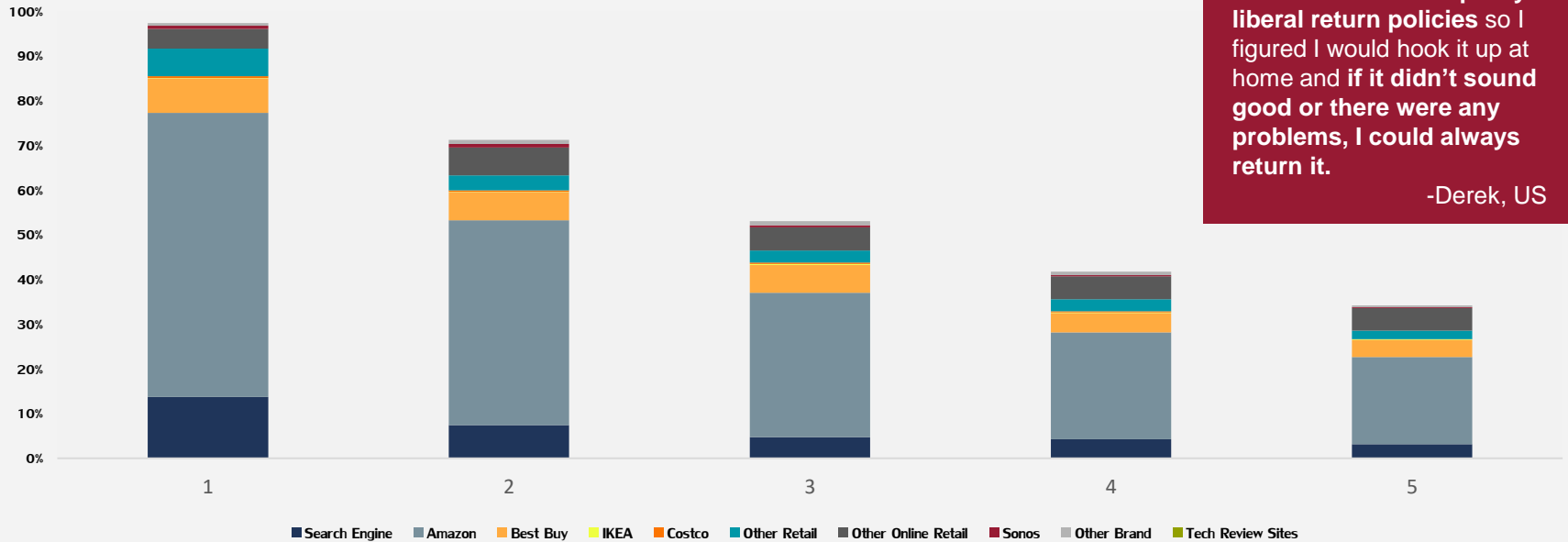
Search engine and retailer sites are the online resources consumers say they most often see first during the purchase journey

Category Owners



Retailer sites are an essential first touchpoint across the category

CROSS CATEGORY MACRO-JOURNEY: ONLINE DESTINATION FROM STEPS 1-5



Amazon does have pretty liberal return policies so I figured I would hook it up at home and if it didn't sound good or there were any problems, I could always return it.

-Derek, US

Online activities are used more than offline resources to shop or research speakers

RESOURCES USED



“

Wirecutter is a huge influence on me. Sonos One has been their **best speaker three years in a row.**

-Scot, US



Less tech engaged Sonos Owners were introduced to the brand by trusted family members or friends that are described as tech engaged or savvy.

Reasons shoppers purchased a speaker

OCCASION PURCHASED FOR

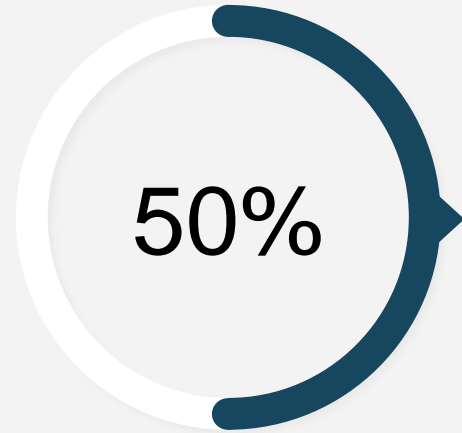




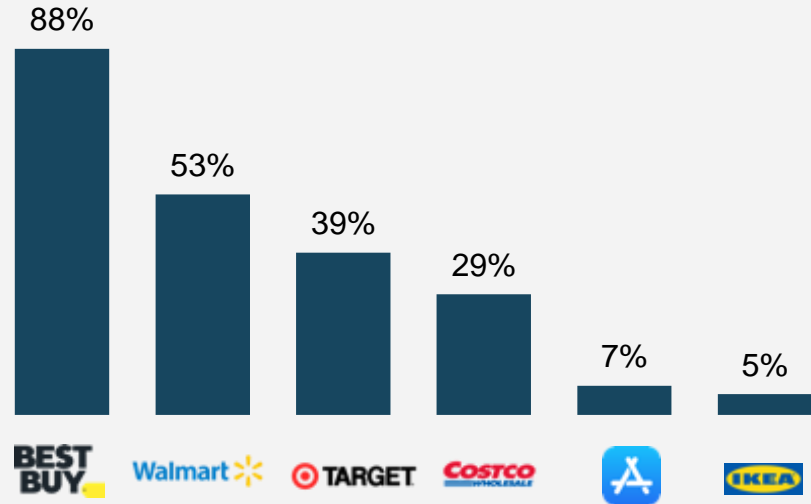
WHAT THE IN-STORE LANDSCAPE WILL LOOK LIKE IN THE FUTURE

In-store is still a key touchpoint for speaker shoppers with 50% intending to visit a store post COVID

RETAIL STORES INTEND TO VISIT IN PERSON

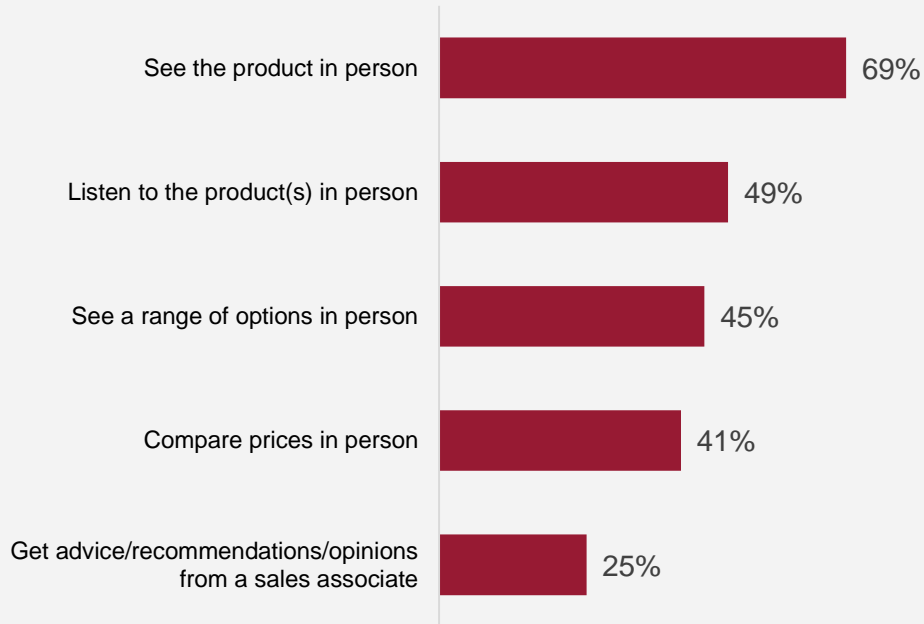


of **US intenders** intend to visit a retail store in person



The classic narrative is still true... people visit a store to see and hear the product

REASONS FOR VISITING A PHYSICAL STORE



In-person visits

allow consumers to see, (at times) listen to the sound quality, touch, and pick-up (assess weight). These types of tactile interactions allow consumers to assess quality and envision it in their space. Some speak with sales associates for guidance and to ask questions. For many, this is an important step in the path to purchase.

KEY

TAKEAWAYS



Key Takeaway

01

QUALITATIVE
1x1

Insight

Rethink typical shopper
journey framework



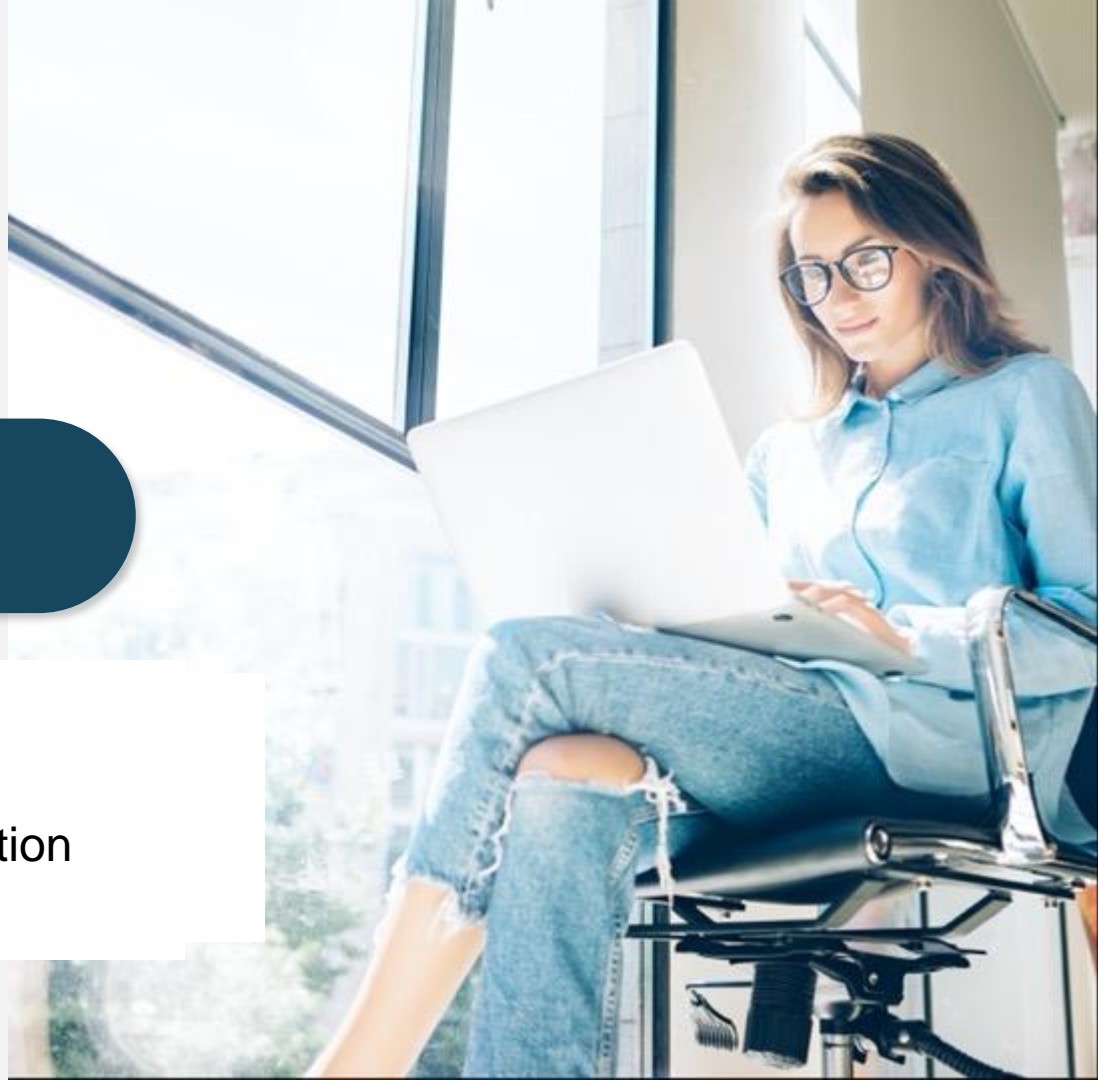
Key Takeaway

02

ONLINE
SURVEYS

Insight

Optimization



Key Takeaway

03

**PASSIVE TRACKING
ON DEVICES**

Insight

Go Digital!



Q & A

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