

Follow that Shopper!

Building an Omnichannel
Shopper Research Program at

ROKU



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ROKU

Roku: 2019

New Product Owners



NPS

Issues

Reviews

Tenured Users



Exploration

Issues

Usage

Churned Users



Reasons

Push/Pull

TV Now

Roku: 2020

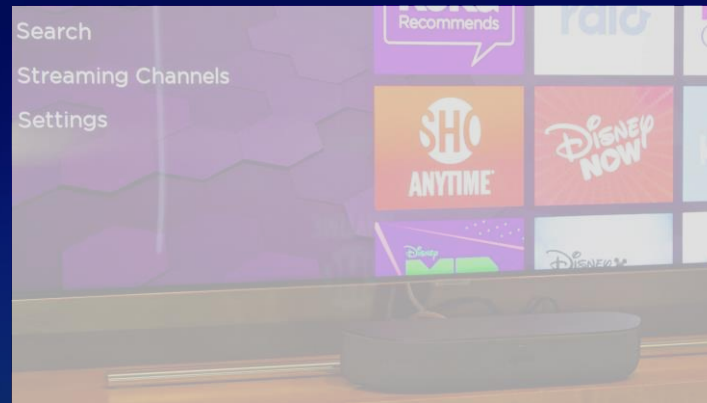
What About Before They Became Roku Users?



New Product Owners



Tenured Users



Churned Users



The Missing Piece



Shopper
Research



Online
SHOPPERS



In-Store
SHOPPERS



Recent
SHOPPERS



Online Shoppers



Online Shoppers: Quantitative (Behavioral Data)



Purchase Journey Mapping

- What are the critical touchpoints to influence customers?



Before/After Navigation

- How actively do customers engage in comparison shopping?



Domain of Influence Analysis

- What are the sites of statistical significance in enhancing brand perception and converting sales?



Search Analysis

- What search terms are most relevant in my product category?



Site Correlation

- Are customers who are frequently visiting website A, B and C also visiting X, Y and Z frequently?



Online Shoppers: Quantitative



Over **X%** of our sample shopped only **one brand**



Segmenting shoppers in a continuum of consideration



One in XX category shoppers make a purchase

Search and Product Detail Pages are key points of engagement



How important are **search tools**

Although Review Site visits are preceded by Search, trust and habit drive traffic to these sites

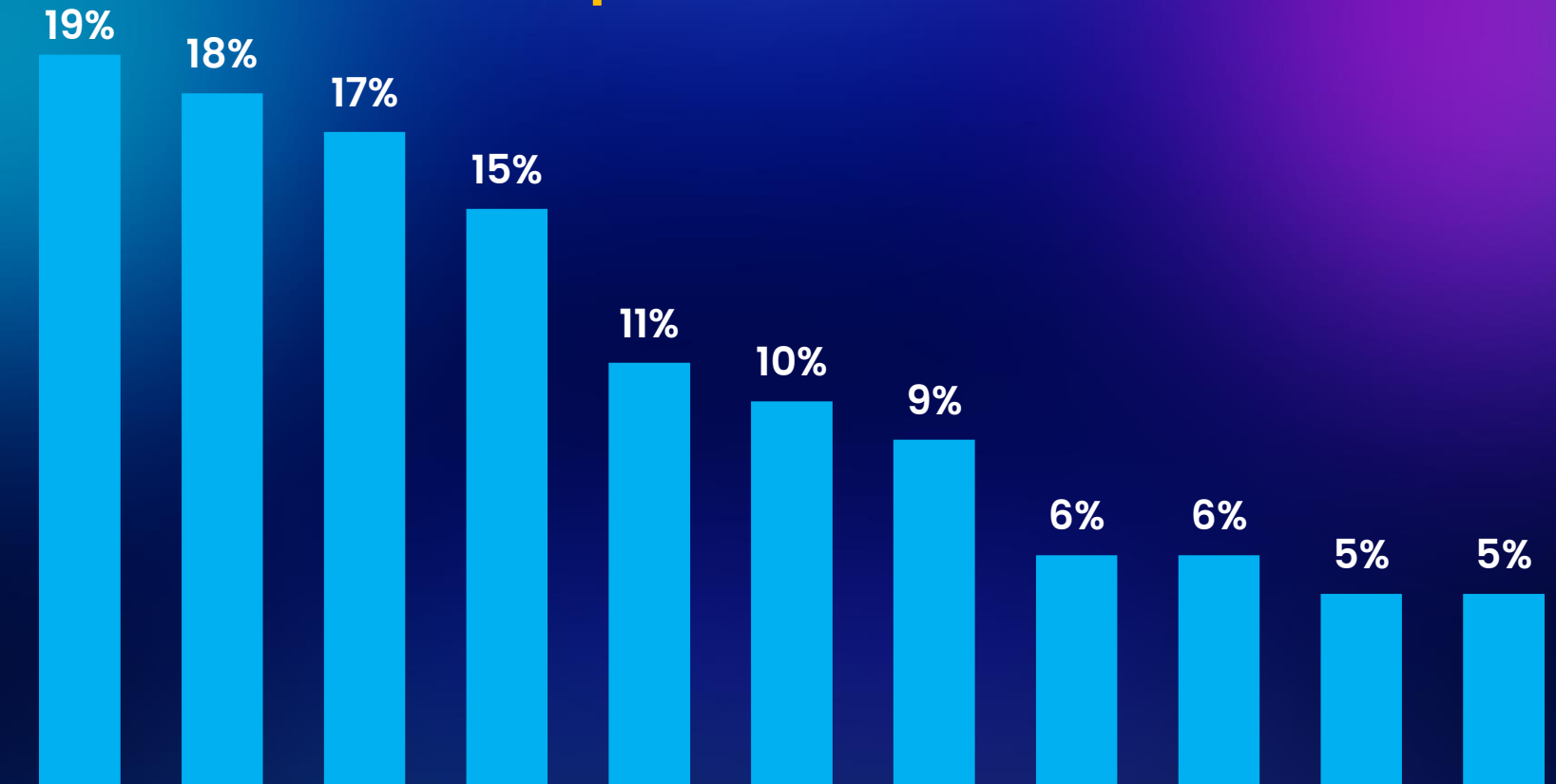
Over **XX%** of visitors to core retailers use on-site search

There's opportunity to educate consumers about **XXX**



Online Shoppers: Quantitative

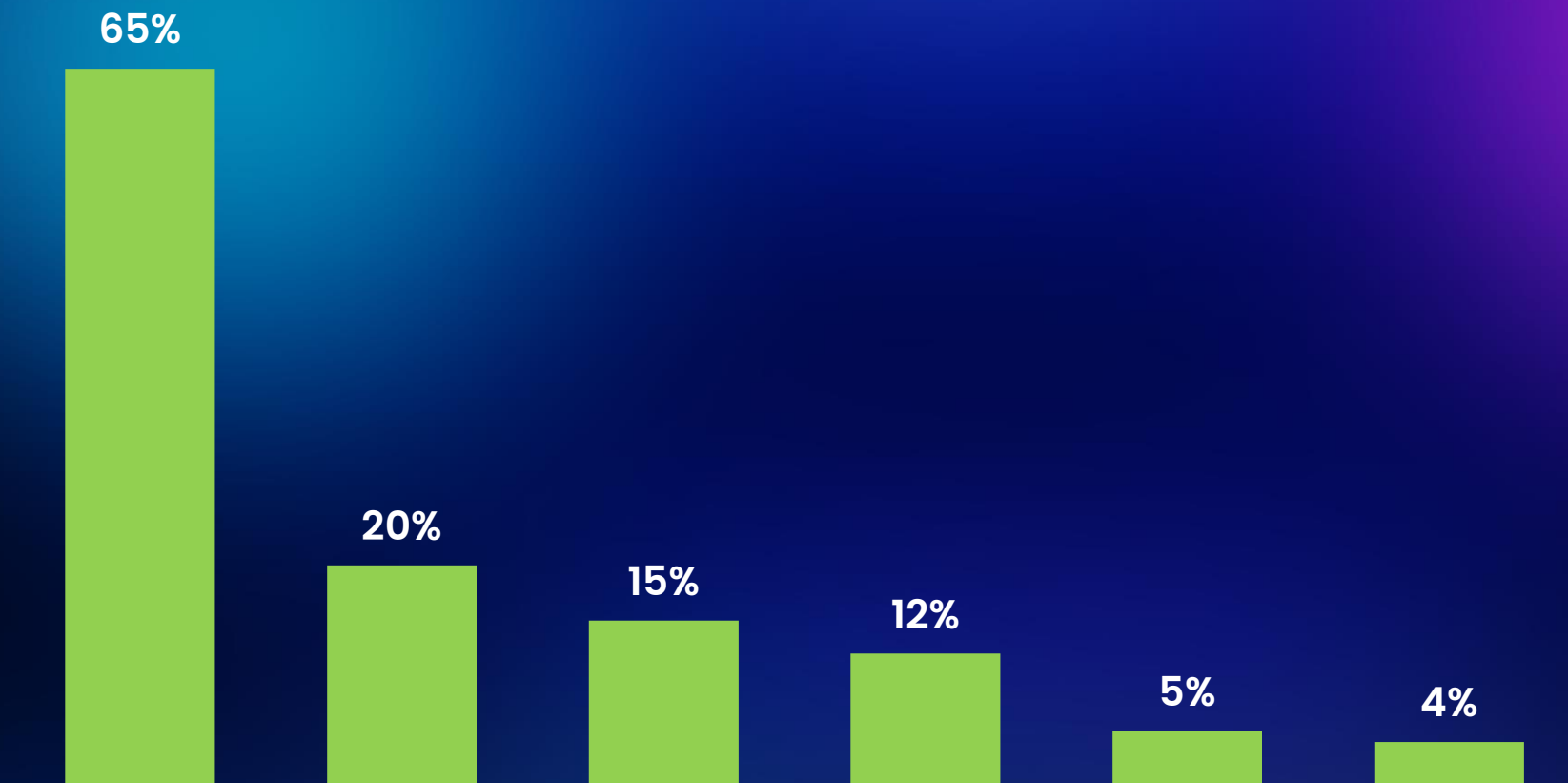
Top Search Terms





Online Shoppers: Quantitative

Retailers Visited



Othersite.com gets

X%

Roku shoppers

XX%

of Roku shoppers start on
Roku.com

X%

start on site.com or a
search engine

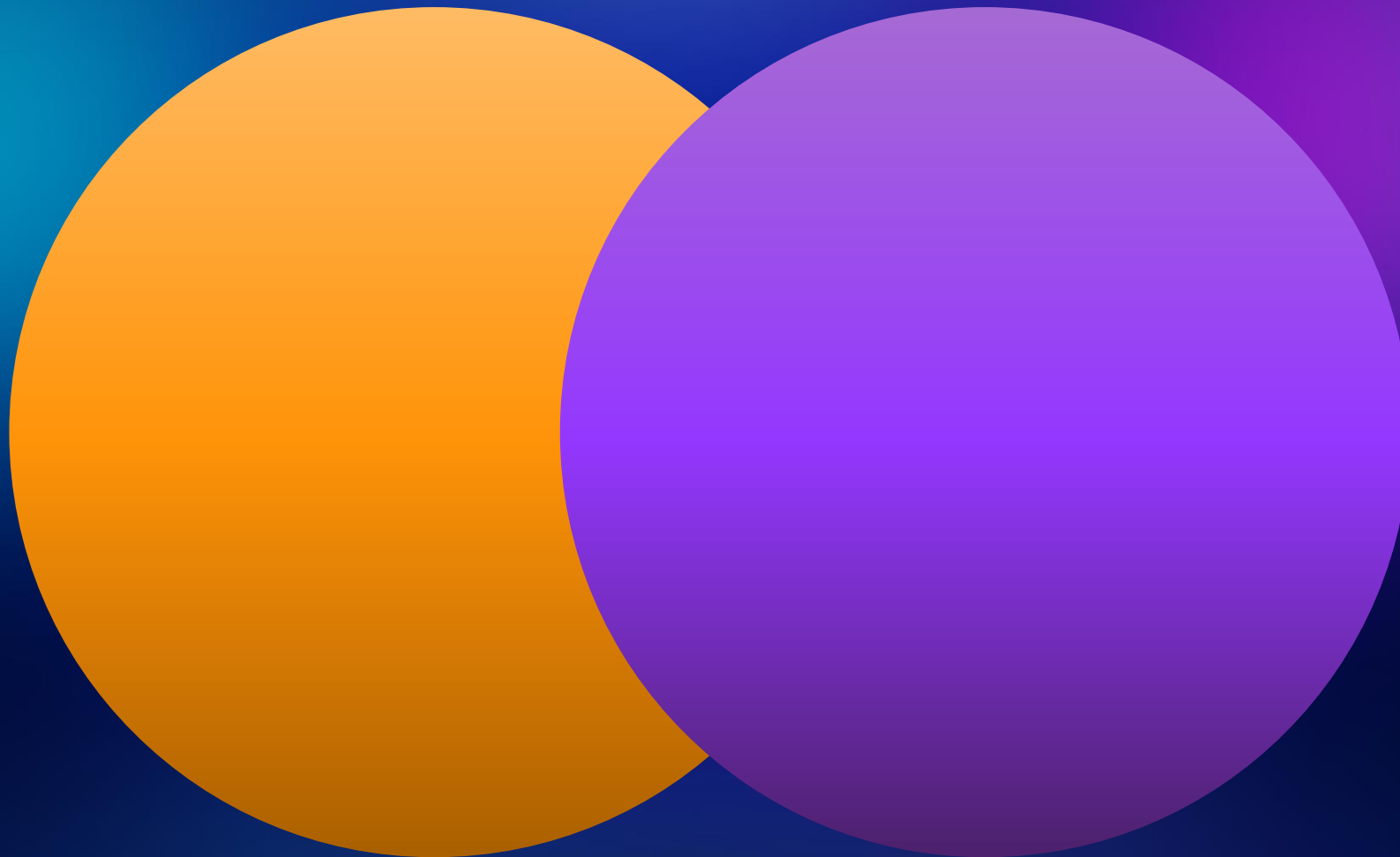


Online Shoppers: Quantitative



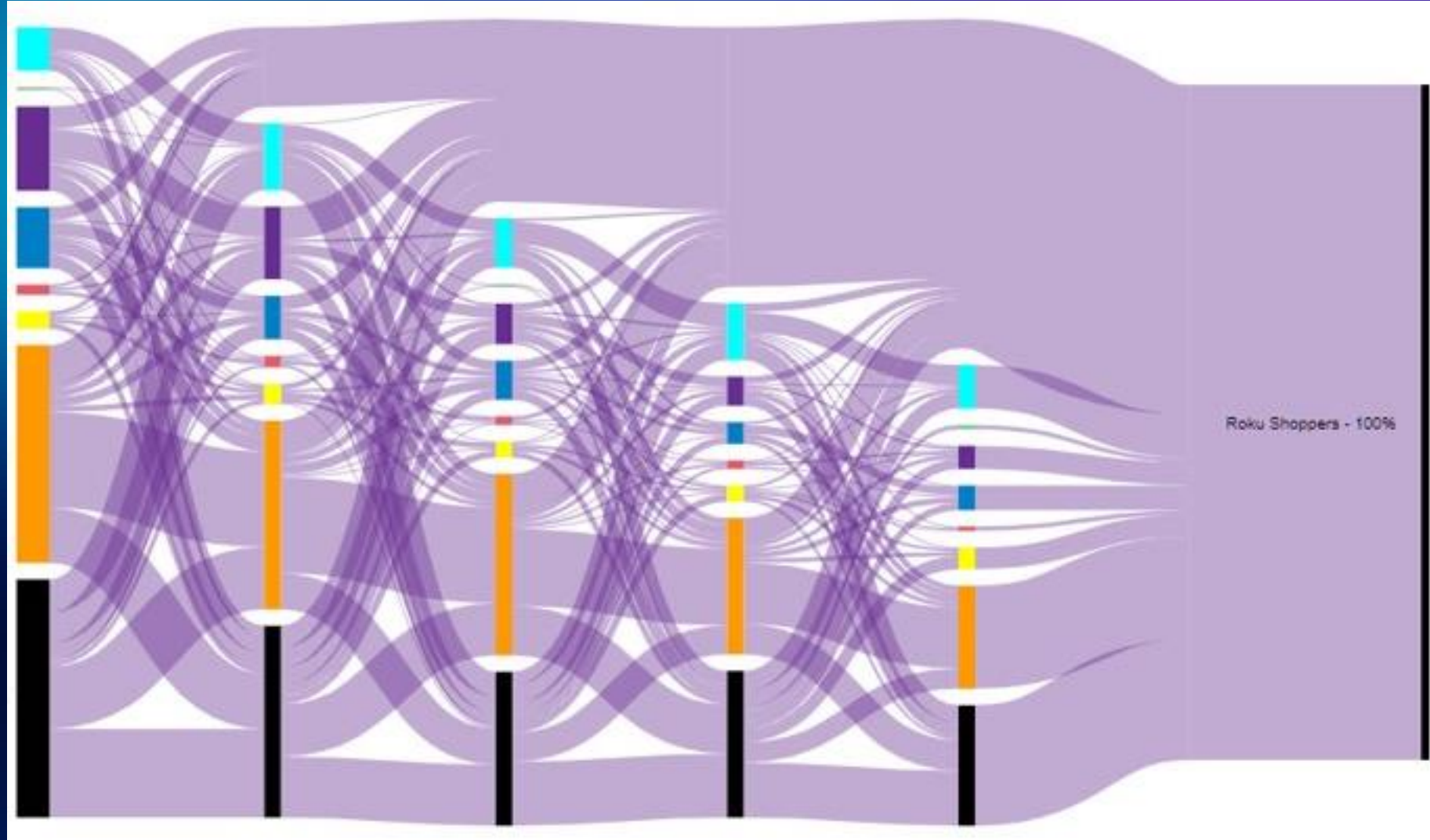


Online Shoppers: Quantitative





Online Shoppers: Quantitative







In-Store Shoppers



In-Store Shoppers: Qualitative



Purchase Journey Mapping

- What are the critical touchpoints to influence customers?
- What are the steps? How long does the journey last?



Shopper Motivations

- What kicks off the journey to begin with?



Retail Navigation

- What are barriers and aids to the shopper experience?
- Major pain points? Delights?



Experience Content

- Do shoppers find everything they need to aid their buying decisions?



Retailer Assessment

- How can we improve in each key retailer and convert more shoppers to purchasers?

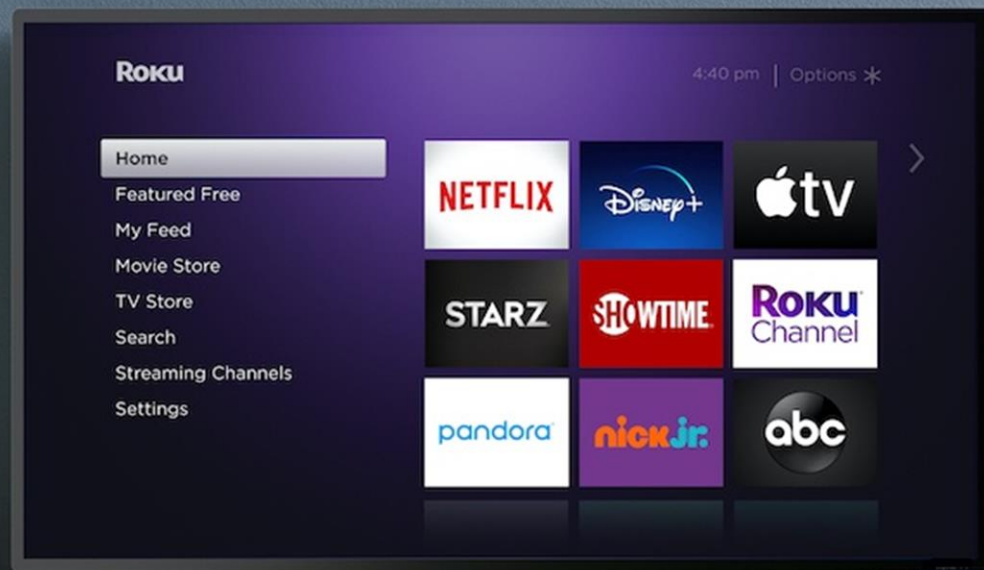


In-Store Shoppers: Qualitative





In-Store Shoppers: Qualitative





In-Store Shoppers: Qualitative








"I just don't have a lot of confidence going into it."



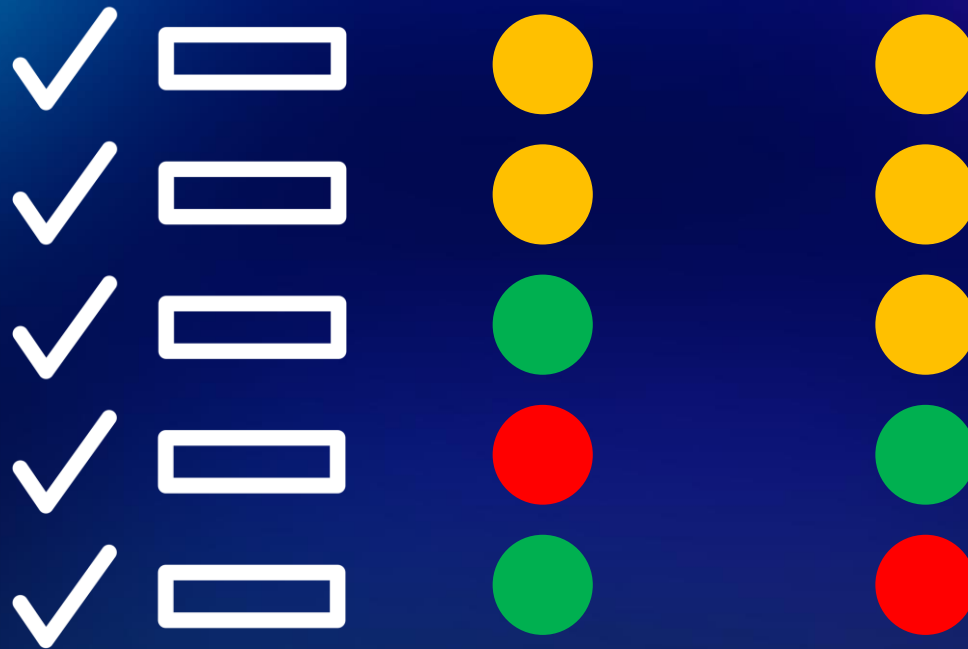
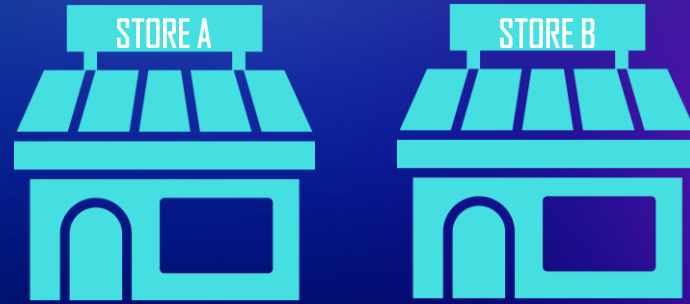
In-Store Shoppers: Qualitative



Pre-trip		In-store	Post-trip	
Elevate	Educate	Visualize	Reassure	Invest
Time to replace the old set!	At home, online	See TVs for real, subjectively assess	More focused research online	After some time
				



In-Store Shoppers: Qualitative





Recent Shoppers (New Roku Users)



Recent Shoppers: Quantitative



Buyer Profiles

- Who are the new Roku buyers?
- Where did they come from?



Research Process

- How did they research?
- Where did they buy and why?



Purchase Process

- When and how did they decide on a brand? A specific product?



Their Roku Experience

- Impressions so far
- Experience on the Roku platform



What's Next

- How to retain and engage them



Recent Shoppers: Quantitative



TV Streaming Newbies

- Older, female skew
- Had been watching cable or satellite TV



Prior Player Streamers

- Youngest, male skew
- Don't need the whole house to stream on one platform

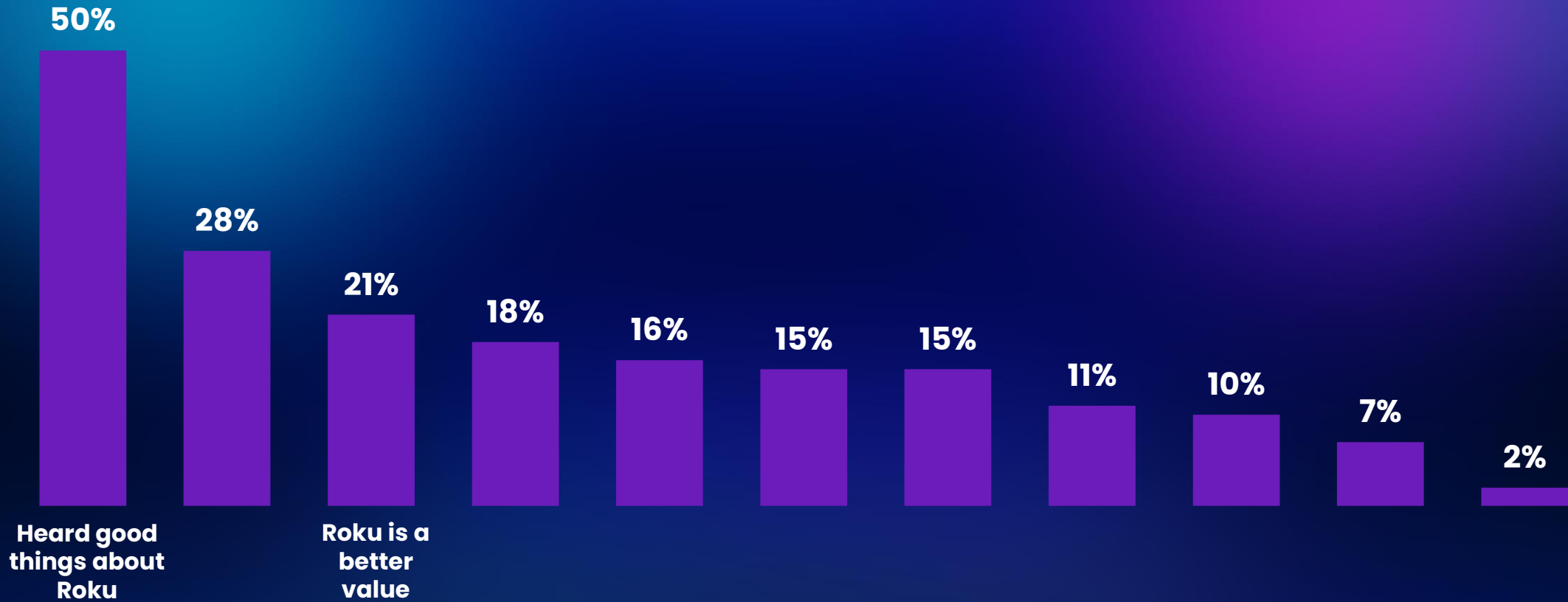


Prior Smart TV Streamers

- Older, retired
- Adding a device to improve their smart TV streaming experience



Recent Shoppers: Quantitative



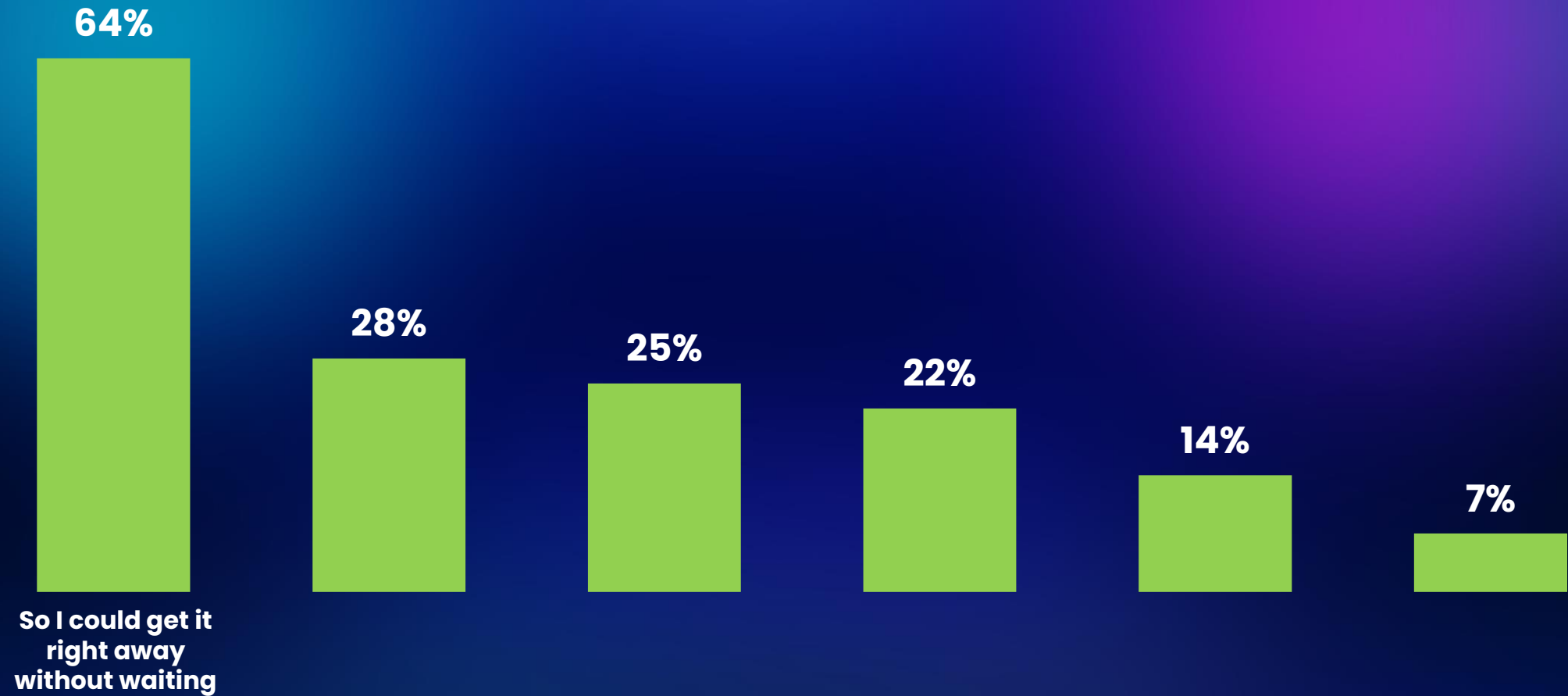


Recent Shoppers: Quantitative

- “ A family member told us about Roku. About the same age; said it was simple to install. If HE could do it, I knew we could.
- “ The sales associate was like a Roku maniac. He had it and explained everything to me.
- “ You don't need to buy a new smart TV to start streaming. Just install a Roku and get going!



Recent Shoppers: Quantitative





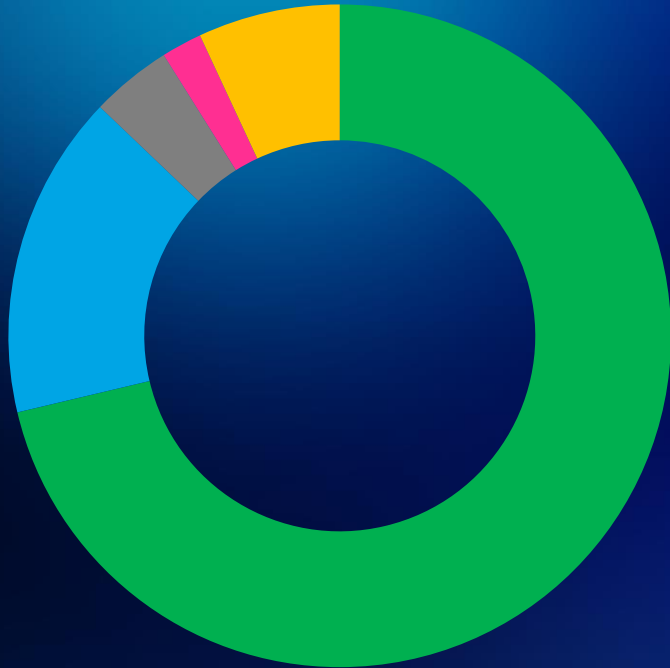
Recent Shoppers: Quantitative

	Player A	Player B	Player C	Player D	Player E
#1	Ease of setup and use	Ease of setup and use	Ease of setup and use	Ease of setup and use	Ease of setup and use
#2	Feature A	Feature B	Feature C	Feature C	Feature C
#3	Feature B	Feature A	Feature D	Feature D	Feature A
#4	Feature D	Feature D	Feature B	Feature A	Feature D
#5	Feature E	Feature E	Feature A	Feature E	Feature E



Recent Shoppers: Quantitative

ROOM WHERE TV IS LOCATED?



ATTACHED TO PRIMARY TV?



ATTACHED TO SMART TV?



Roku: 2023

Online Shoppers



In-Store Shoppers



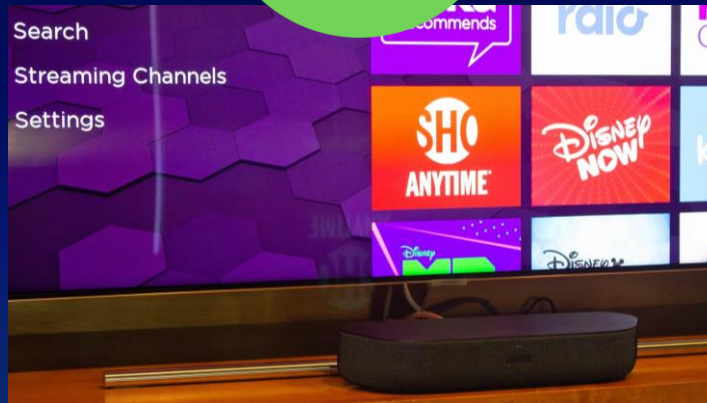
New to Roku (Recent Shopper)



New Product Owners



Top Users



Churned Users







Roku

Roku Surpasses
70 million
Active Accounts!



ROKU[®]

TV Starts Here