Roku

Integrating Survey Programs with Behavioral Data
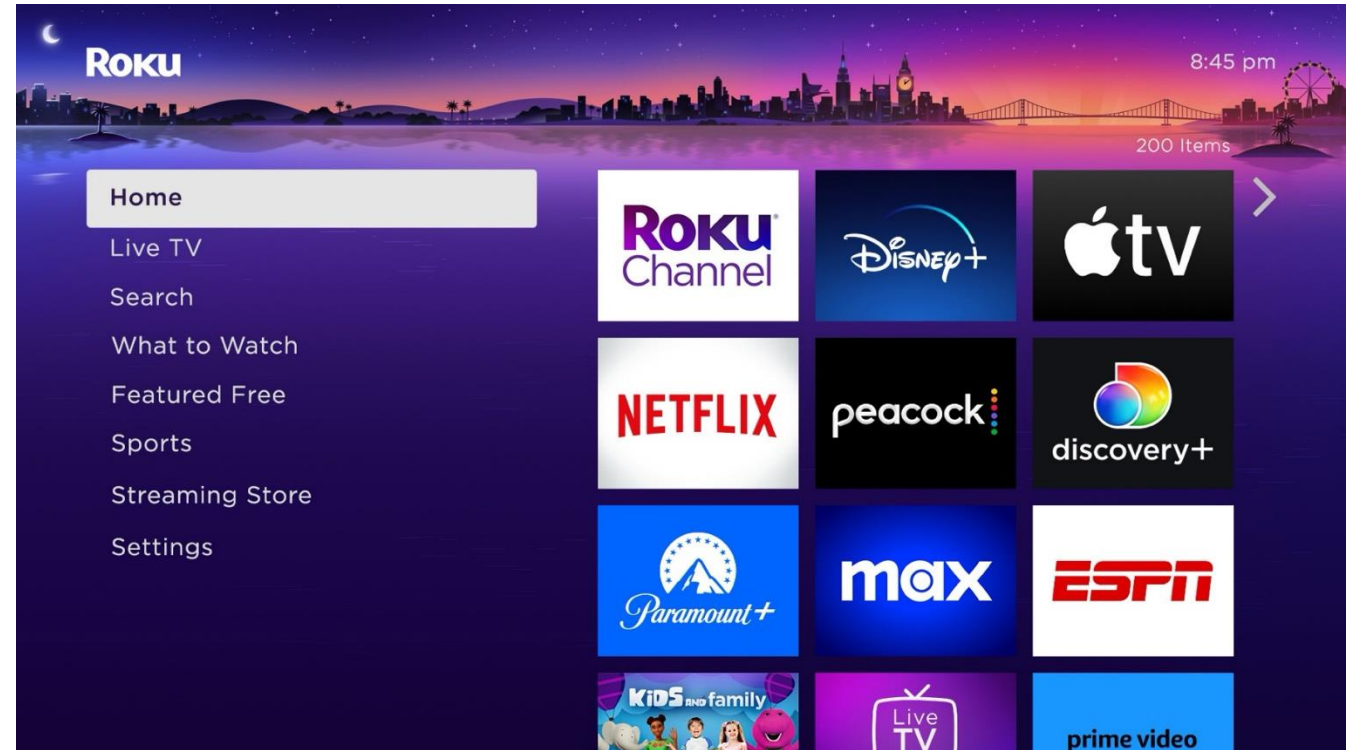
Alex Strauss, February 2025

Roku

#1 selling TV OS in the US
Over 90 million Streaming Households

About me

- Insights professional for 10+ years

- Brand/Marketing Research →
  Content Research →
  UX Research

- Helped to build survey programs at 3 companies

- Focused on growing and developing
  The Roku Channel and Roku sports offerings

Agenda

1	**Why integrate behavioral data into surveys**
2	**Use Cases for Integrated Surveys**
3	**Building an integrated survey program**
4	**Including user data in email survey lifecycle**
5	**Key Watchouts**
6	**Questions**

Why integrate behavioral data into surveys

Common Issues with Online Surveys

Issues

Sample can be wasted or raise CPI if targeting a low incidence audience

Consumers have minimal patience to take long surveys

Valuable survey space is taken up by behavioral questions

It is hard for consumers to recall their exact behaviors or actions

Endless amounts of user data!

Most consumer brands have heaps of data on their customers

- Basic PII (e.g. name, email, age)

- User actions

- Usage/engagement frequency

- Spend/revenue

Finding solutions by integrating user data

| Issues		Solutions
Panel sample can be wasted or raise CPI if targeting a low incidence audience	→	Target specific users that meet the criteria based on actions taken
Consumers have minimal patience to take long surveys	→	Reduce the number of questions needed by appending data
Valuable survey space is taken up by behavioral questions	→	Free up space to ask more and deeper perceptual questions
It is hard for consumers to recall their exact behaviors or actions	→	Append real usage data so there is less reliance on claimed response

Use Cases for Integrated Surveys

There are opportunities throughout the users journey to implement targeted surveys
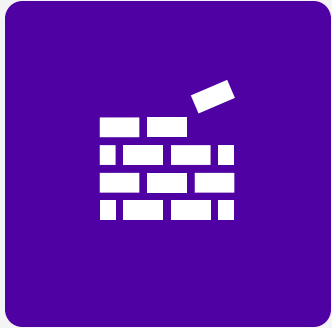
Foundational Studies

Target users with behaviors to understand why they take those actions and identify opportunities to improve those experiences
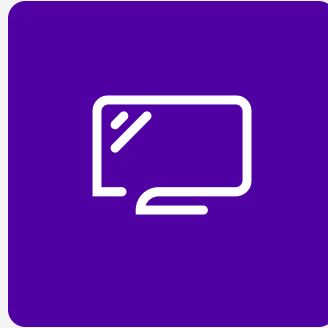
Usability Studies

Get direct user feedback/sentiment during the development of a product/feature to ensure successful launch

Evaluative Studies

Contact users who have engaged with a newly launched feature/product to understand how they are using it and their perceptions of it

Connecting user sentiment to determine successful A/B tests


Objective

When running A/B tests among our users, success was only determined by shifting behavioral metrics like streaming hours or retention. It was important that we designed features that not only improve business metrics, but also improved the user experience

Approach

We began linking a sentiment surveys to our A/B tests to measure user perceptions in parallel to these experiments. Surveys were sent to users allocated to the control cell as well as the test conditions and we measured lifts/declines on these metrics between the cells

Results

These surveys have provided great context, causing some tests that would have proceeded to pause and iterate, ensuring that user's expectations are met. This has been so successful and appreciated that this program is continuing to scale this year and additional researchers have been brought on to support it
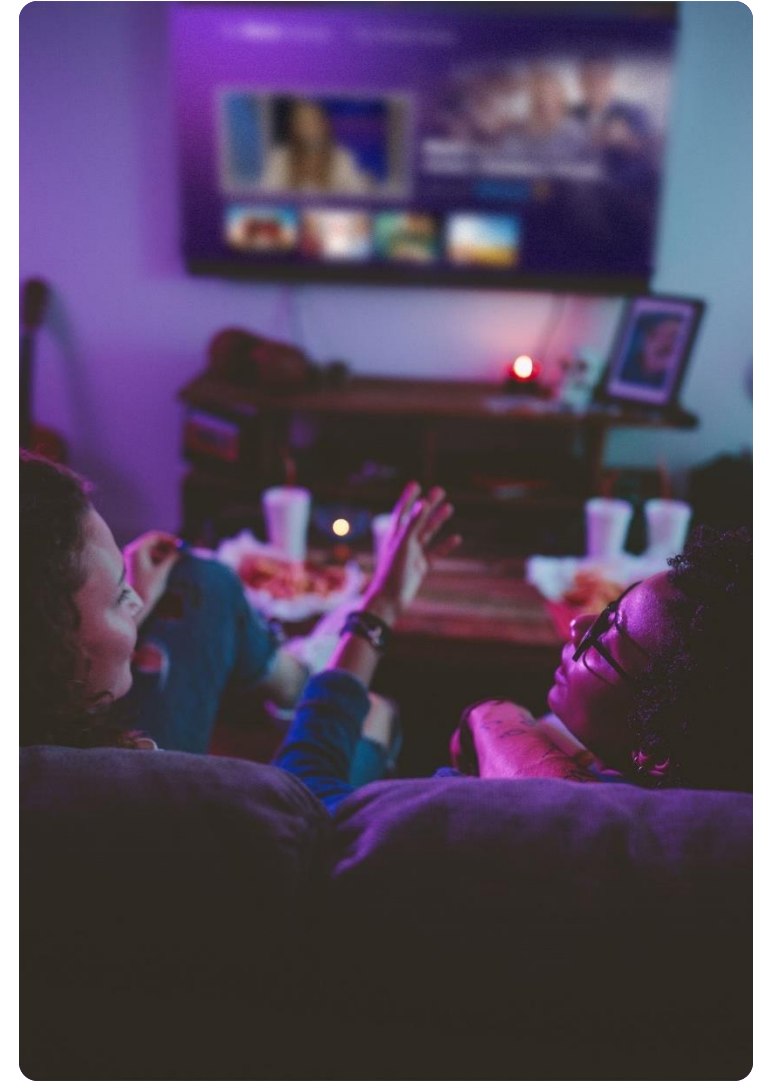
Building an integrated survey program

Building these programs requires cross-functional buy-in and support

When developing program from scratch it can take some time to connect with different stakeholders internally and externally to ensure quality responses and protect data privacy

Data/Analytics

Build the bridge to be able to pull lists of users and connect the relevant data points

CRM/Marketing

Ensure compliance with email formats, branding, and cadence

Legal

Sign-off on templates, compliance with data policies (e.g. GDPR), set up T&Cs/NDAs

Research Vendors

Self-service: build pipelines/APIs to bring in data and protect it

Full-service: set up data compliance and NDAs

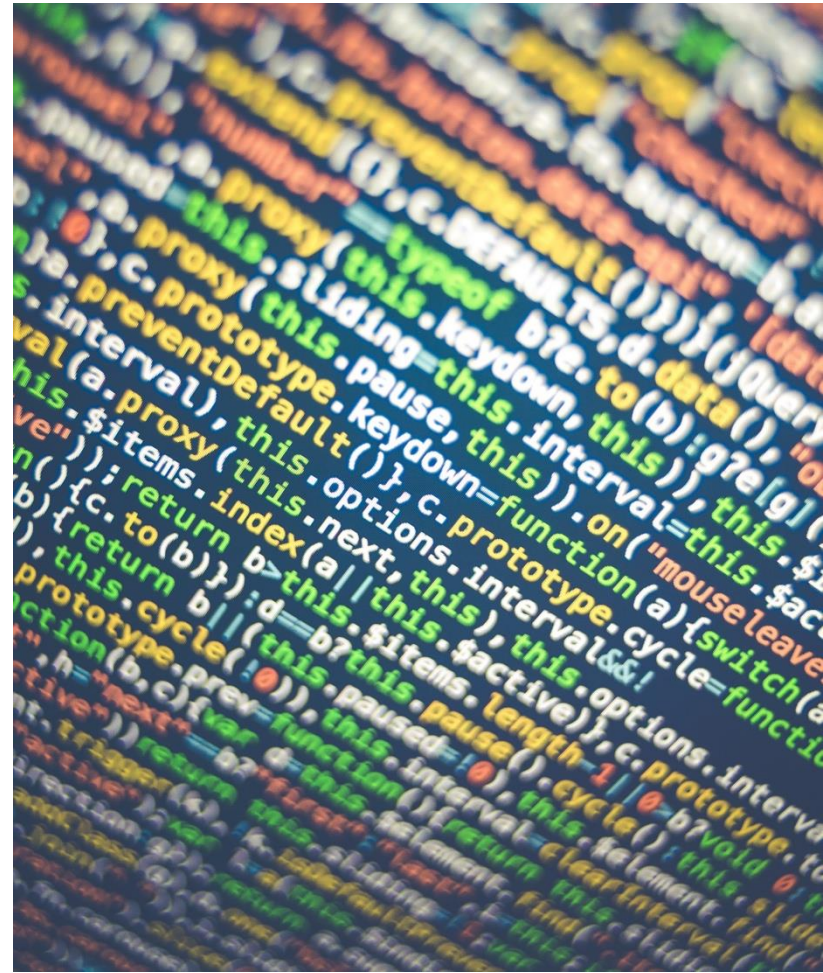# Working hand-in-hand with analytics

Role of Analytics

Generate targeted lists of users:

- Establish a process to query user database and pull out the right information

Append behavioral data:

- Data is used to target specific users for survey as well as connect behavioral data to be appended to responses

Tip: Make friends, and ask nicely for favors ☺

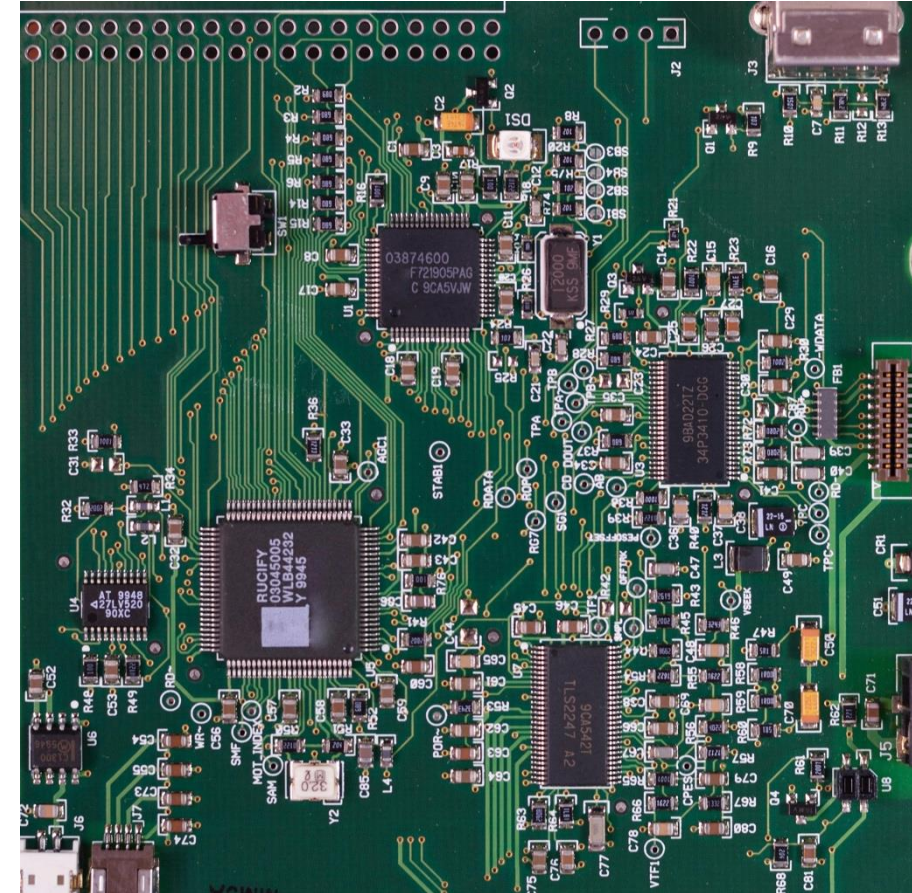# Working hand-in-hand with analytics

Types of Data needed

- For targeting users

- For weighting data

- For appended behaviors

Format it is in:

- Creating buckets for profiling

- When it is refreshed

Tip: If not already created establish generic ID per respondent to be able to match back data later if needed
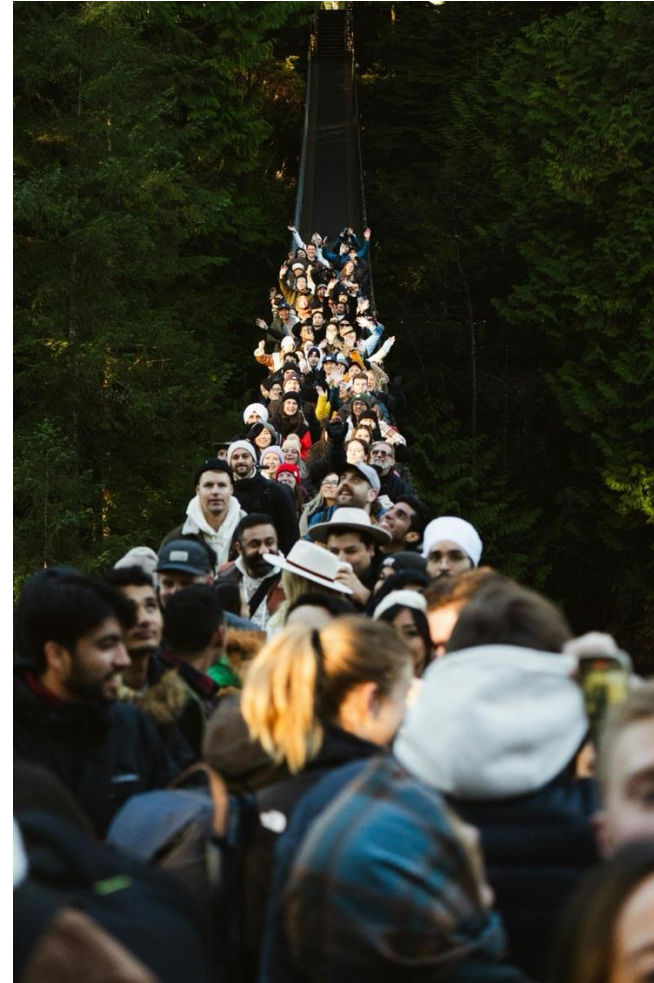
Working hand-in-hand with analytics

Creating and Uploading Lists

- Build a process to pull lists of users from database

  - Analytics contact to pull lists for you

  - Standardized queries

  - Self-service tool (DMP)

Tip: For the novice SQL user, using ChatGPT is the best way to make updates to queries and troubleshoot any errors you run into

Ensure a positive email experience

Building email flow

Choose one of two paths

Send through vendor/self-service platform

+ Pros
- Easy
- Efficient
- Layer of protection

— Cons
- More standardized
- Less branded
- Less support

Send through internal email system

+ Pros
- Protection through scale
- Consistent branding
- Dedicated support

— Cons
- Additional steps in the process
- Liability to hurt marketing lists

Ensure a positive email experience

Maximizing response rates

- Adhering to email best practices

  - Establishing sub-domain

  - Volume of sends

  - Sending to quality emails

  - Maintaining Opt-Outs

  - Engaging text (e.g. 'From' email, Subject line, email body)

Tip: Establish a liberal exclusion period and build a list to maintain most recent contact dates

Connect with users in the right way

Don't Break the Rules!

- Potentially need sign-off on:
    - Email language
    - Question language
    - Data that can be used
    - Who can be contacted (e.g. no one under 18)
    - Varying international policies (e.g. GDPR compliance)

- Sweepstakes: Need to set up T&Cs

- Sensitive questions: Need to set up NDA

- Setting up research vendors

Tip: Policies are constantly changing, set up annual check-ins to make sure the process is still in complaince
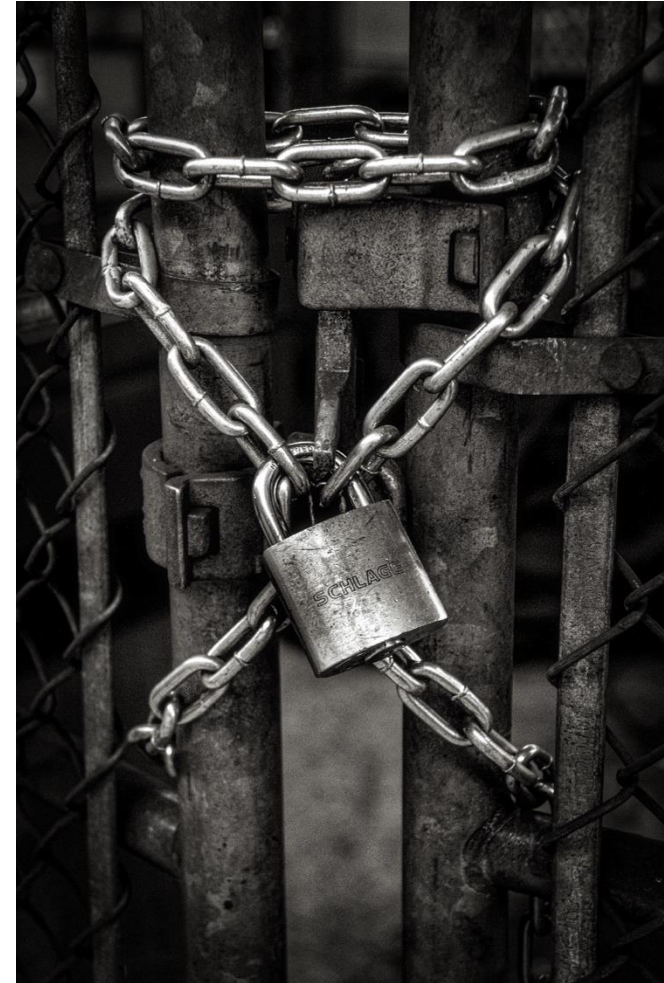
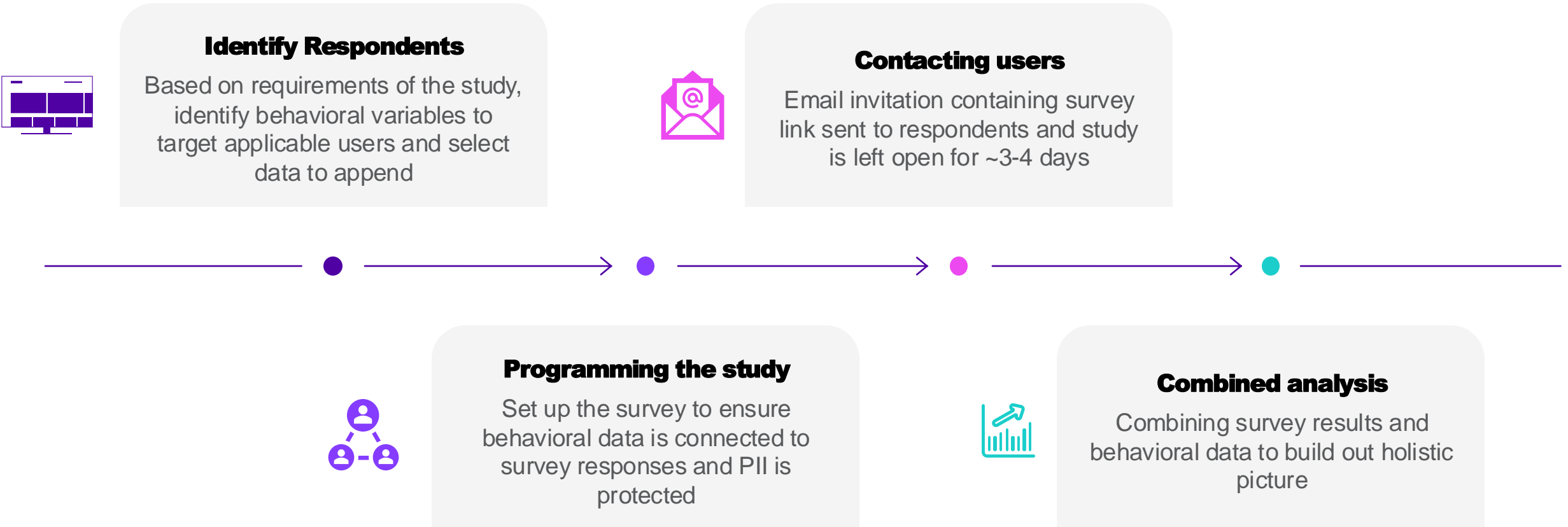# Streamline the survey delivery process

Protect the Data

- For survey platform:
    - Build a secure link to upload sample files
    - Ensure data is protected, properly encrypted
    - API connections to bring in lists or export results

- For research agency:
    - Establish NDA/Data privacy agreement to access emails and data
    - Same as above

Tip: Figure out ways to minimize the amount of PII passed back and forth

Including user data in email survey lifecycle

Email Survey Life-cycle

Identify Respondents
Based on requirements of the study, identify behavioral variables to target applicable users and select data to append

Contacting users
Email invitation containing survey link sent to respondents and study is left open for ~3-4 days

Programming the study
Set up the survey to ensure behavioral data is connected to survey responses and PII is protected

Combined analysis
Combining survey results and behavioral data to build out holistic picture

Identifying respondents
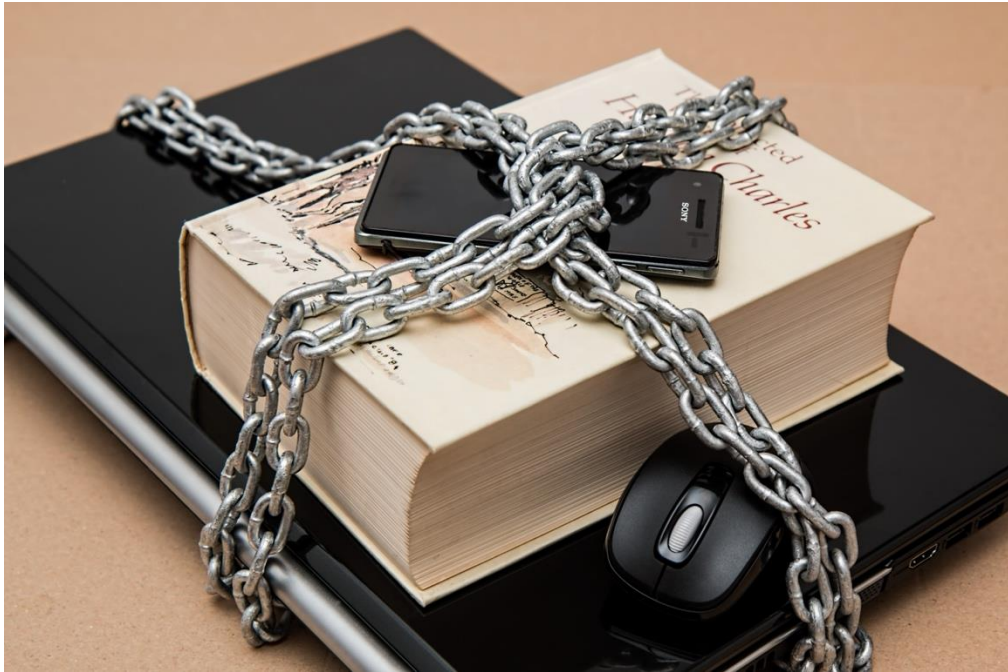
Define the Audience

- Who is the audience for this study?

- Identify specific actions taken, profiles suited specifically for this project

Pulling the Audience

- Append data up front

- Protect the data you are pulling
  - Personal emails should not touch local device
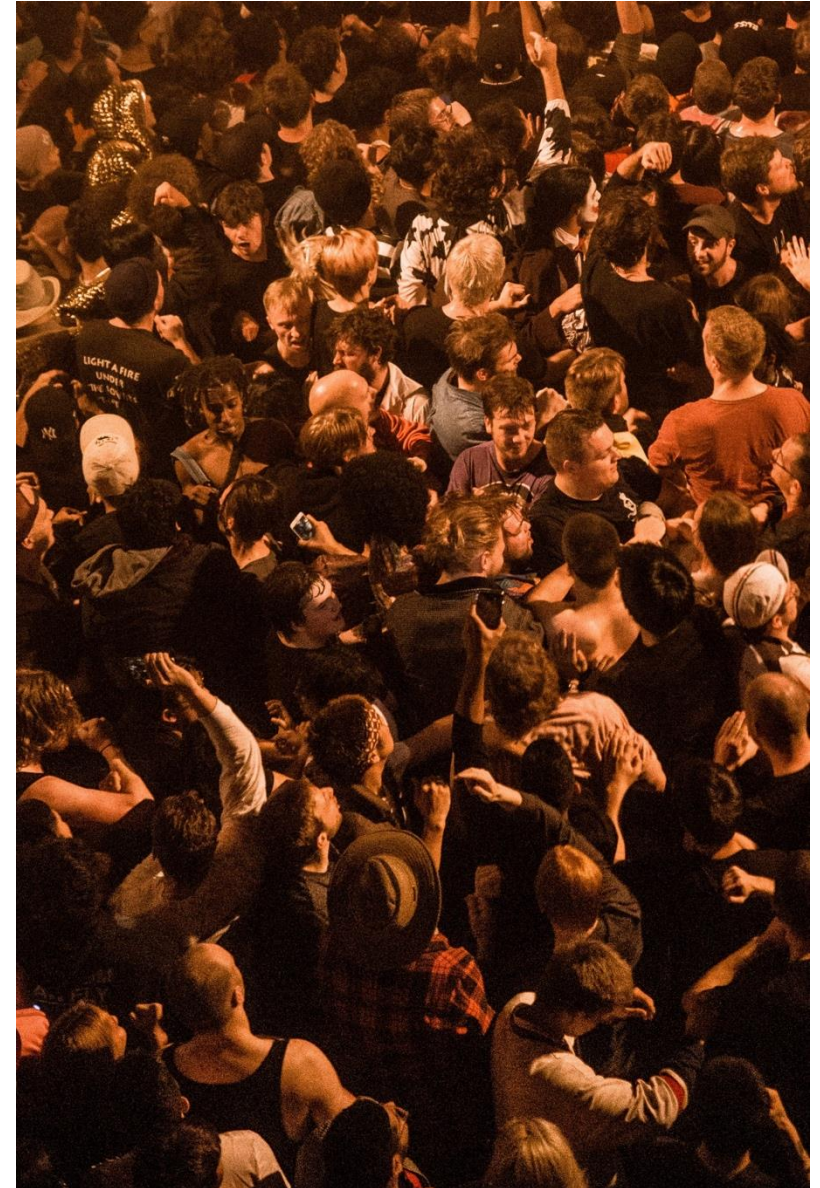
Programming the study

- Whether you are programming the survey yourself or are working through a vendor, ensure that your behavioral data is linked to survey responses
  - Ex. Set up embedded data fields

Contacting Users

Validating Behaviors

- Validate that the behaviors connected to the user correspond to the person answering the survey

  - It can also come off as 'creepy' or big-brother if you infer that they performed that behavior without them saying.

Setting up Emails

- Create email templates that maximizes response

- Consider incentive/sweepstakes program
  - Consider for international studies policies may vary

Typical response rate

1-2%
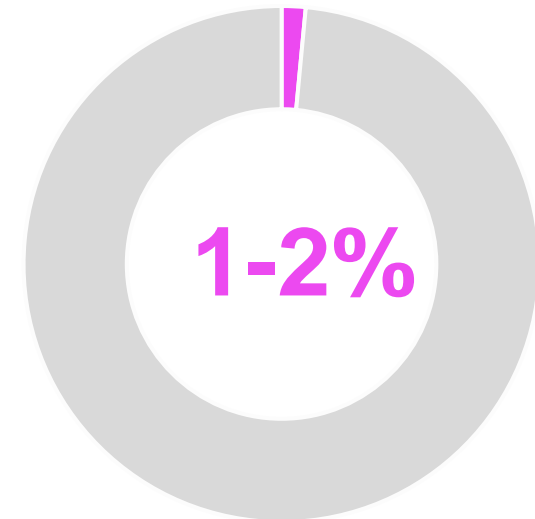
Ex. Pull 100k for 1,000 responses

Can be up to 5% with incentives

Combined Analysis

Conducting Analysis

- Applying weighting to align respondent population to user population

- Behavioral variables should be used as filters as not findings

Protecting Data

- If downloading data or exporting to survey software remove sensitive information

- Use unique identifier to unify data, not email

- Look at response at an aggregate and not individual level

Including user data in an email survey

Key Watchouts & Next Steps

Key Watchouts

No methodology is without flaws, but it's important to understand and account for any biases that exist in the studies. Understanding your respondents and who you exactly you are talking to is key

Response Bias

Sampling from a user base, especially without incentives can bias response (sample usually skews older), look to manage quotas, offer incentives, or deliver survey in different ways (mobile/social, in-situ)
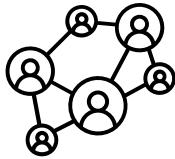
Account level v. User level

Depending on how users are using your service or product, your accounts and users may not be a one-to-one relationship, need to validate that the behaviors you are investigating were done by the one answering the survey.
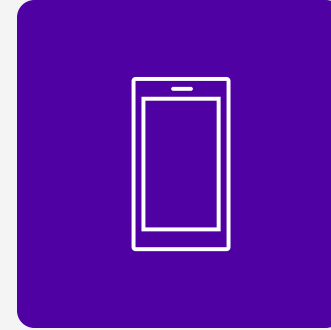
Varying response rates

Based on who you are contacting (i.e. a lapsed user, certain demographics) response rate may be lower than a typical study. May need to boost the sample pull to accommodate for a lower response rate.
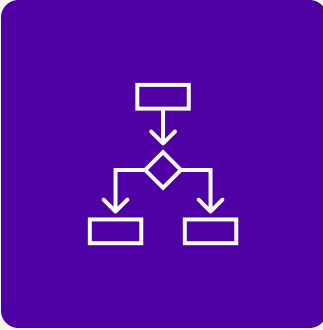
Automations

- Auto-generating surveys and email lists once an A/B test is initiated

- Standardizing outputs and reporting

Multi-platform intercept surveys

- Trying to build pathways to survey users:
  - On-Platform
  - Mobile

Questions?