

Consumer Journeys



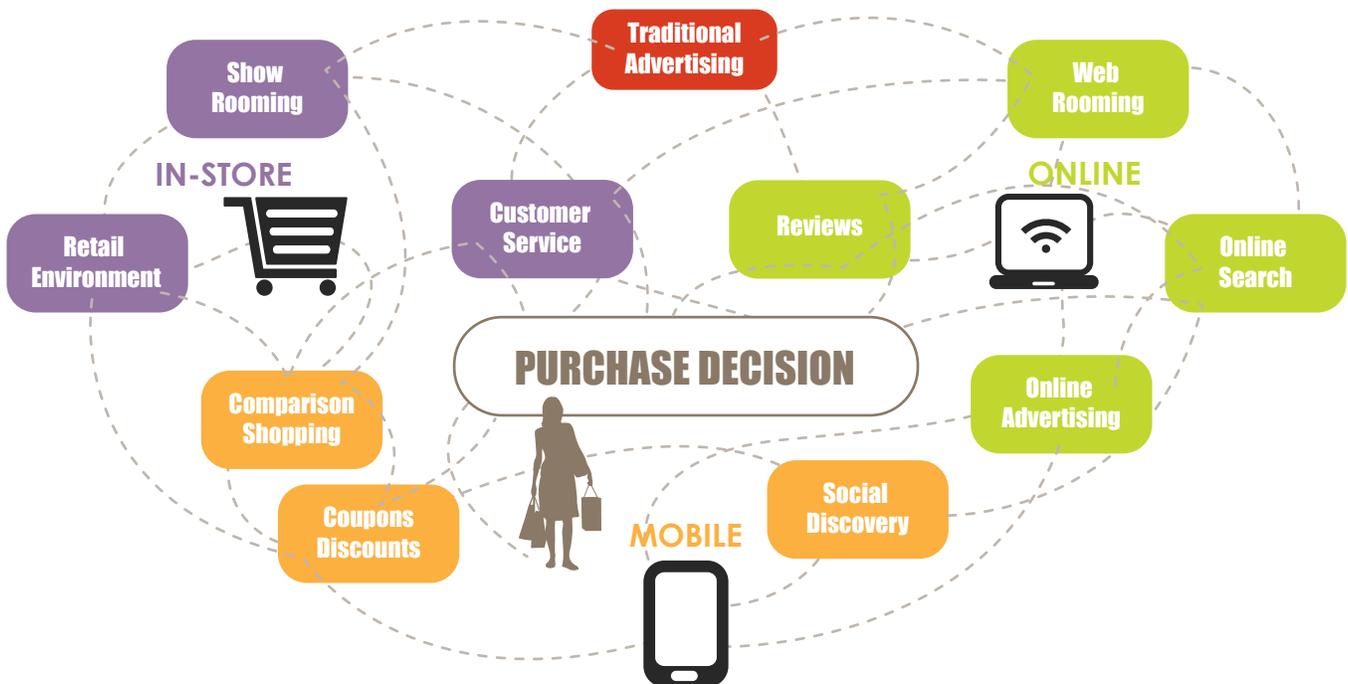
W5 on Consumer Journeys

The ways consumers interact and connect with brands, one another and the world around them is evolving. Consumers regularly toggle between multiple screens throughout their day to complete a variety of tasks, from information gathering, to watching a favorite show, to chatting with friends. This constant connectivity impacts when, where and how consumers develop awareness of brands and how they shop for products and services. Consumer journey research explores the decision-making process for today's increasingly well-informed and digitally savvy shopper. This white paper provides an overview of the key touchpoints in the modern consumer journey, how the consumer journey is mapped, and its impact on go-to market brand strategy.

Interest in consumer journey research has increased rapidly in recent years among those seeking to understand the complex purchase process of consumers in today's digital world. Consumers have never before had such diverse opportunities for engaging with brands and purchasing goods and services through mobile, online, and traditional channels. The growing role of social media and user reviews provide further layers to navigate when understanding the influences that lead to purchase decisions. Investigation of the consumer journey is crucial for brands seeking to identify the critical points in the purchase process influencing consumer decision making.

What is the Consumer Journey?

Traditional consumer journeys charted decision-making inside physical stores with an emphasis on understanding how the retail experience impacted the purchase process. This view of path-to-purchase was restricted to exploring consumer interactions with in-store touchpoints (e.g. shelving, interactions with staff, signage, etc.) as well as the influence of brand perceptions on product consideration. This journey was depicted as a simple, linear process where brands controlled their image and reputation through carefully crafted messages targeting key consumers. Now, the influence of the Internet, social media, and mobile has changed how consumers connect with brands and locate products. This transition from in-store to online retail channels has redefined the touchpoints consumers encounter when interacting with brands and how social conversations influence brand perception.



The New Consumer Journey

Today's consumer journey, instead of a linear process, is splintered with multiple touchpoints across websites, mobile devices, traditional media channels, and retail stores.

Uncovering new stages of the consumer journey and identifying key touchpoints that shape consumer decisions is increasingly important as companies incorporate mobile and traditional channels into their sales strategy and seek new ways to influence the conversation about their brand.

Why is Mapping the Consumer Journey Important?

An analysis of the consumer journey and decision-making process can illuminate the touchpoints that consumers encounter and highlight opportunities for increasing engagement and building relationships with target consumers.

The retail marketplace has transitioned from an environment where brand messaging is "pushed" to consumers through traditional media channels to one where consumers are both "pulling" and "pushing" information through a wider network of touchpoints. Consumers no longer simply browse for product information; they access curated collections of reviews and recommendations (e.g. television show recommendations, news story recommendations, and product recommendations) tailored exclusively to their taste. As personalization builds in power and size, it is critical to understand the complex network of touchpoints consumers encounter in their search for the perfect product or service as each touchpoint is a brand engagement opportunity influencing product purchase.

Consumer journey research involves exploring consumer behaviors during pre-purchase awareness and brand relationship building, in-store and/or online purchasing and related behaviors, and post-purchase behaviors. A comprehensive consumer journey research engagement can help answer questions about when, where, and how consumers consider brands, products, and services. It can also help prioritize strategies for engaging with consumers during influential journey touchpoints.

What are the Stages of the Consumer Journey?

As consumers move across multiple channels to learn about products, services, and brands, the shape of the consumer journey changes. There are two periods of exposure that now play a much more influential role in shaping the journey than previously thought. These include the pre- and post-purchase phase where consumers are considering, evaluating, and building expectations for products, brands, and services.

PRE-PURCHASE

DISCOVER

Consumers are gathering information across multiple media platforms. They are open-minded and seeking information and inspiration.

IDENTIFY

Consumers want to find a specific product, service, brand or product. They are familiar due to past experience and are using tools and touchpoints to locate what they desire.

POST-PURCHASE

CONSUME

Consumers are using and enjoying their purchase. Consumers may want to connect with the brand post-purchase to enhance their experience.

SHARE

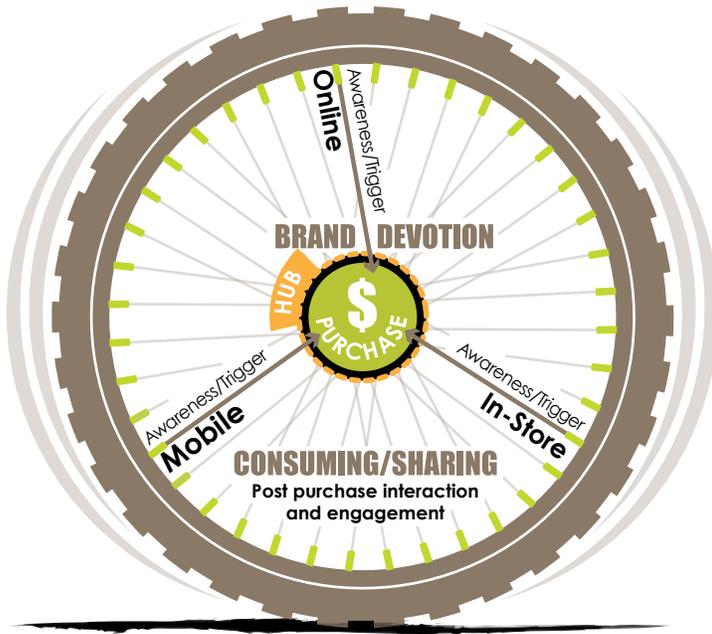
Consumers share their experience with others through word of mouth, product reviews, and posting on social media sites. They are eager to advocate and co-create.

The pre- and post-purchase phases of the consumer journey are separate parts of the consumer journey, but touch and influence one another. Consumers will often rely on information gleaned in the post-purchase phase to help guide their next purchase. Because these stages are interrelated, the consumer journey takes on a much more circular, seamless shape. With the pre- and post-purchase behaviors flanking the purchase process, buying the product is no longer the end result of the journey. Instead it exists somewhere in the middle. The graphic below illustrates the stages in the consumer journey and their role in shaping consumers' purchase decisions.

At W5 we use the image of a wheel to conceptually represent the journey consumers take through the marketplace. Essential wheel component parts (axle, spokes, hub) offer metaphors for important concepts in the fully integrated consumer journey:

DISCOVERING

Passive consumption of stimuli and inspiration online, in-store, and socially



IDENTIFYING

Active searching for brands, products, and deals online and in-store

Conceptual Overview of the Consumer Journey

The *Discovering* phase is the passive acceptance consumers undergo when gaining exposure to brands through browsing retail sites (either online or in-store), traditional media channels, social interaction (online and in-person), and other digital activity. Digital media has multiplied consumers' opportunities to learn about and explore brands.

In the *Identifying* phase consumers actively seek out information about brands to fulfill their current or future needs and build a base of knowledge about how, where, and when they might further engage with and possibly purchase brands.

Discovering and *Identifying* both result in consumer awareness of brands, but more importantly they can both lead to a trigger that transitions consumers into the purchase process. What triggers a purchase can vary by brand, product, service, or category. However, understanding what triggers purchase is of utmost importance to those looking to influence consumer purchase motivation and is a central goal of consumer journey research.

For brands seeking to improve engagement with customers, evaluating post-purchase behaviors is as important to the overall consumer journey as the process leading to purchase. It is during consumers' post-purchase engagement with brands that relationships can be further strengthened and brand devotion cultivated. Understanding how consumers interact with and engage with brands post-purchase is a critical step in consumer journey research for brands looking to increase and improve their connection with consumers.

- **Wheel** – The outer part of the wheel makes contact with the ground as it moves forward and can be thought of as representing the process that consumers experience as they are passively exposed to, and actively seek out, stimuli, information, and inspiration about brands, products and services.

- **Axle** – The axle represents the moment-of-truth in the actual purchase and is the central point around which the wheel, and metaphorically the consumer journey, rotates.

- **Spokes** – The spokes are a necessary part of a wheel offering structural integrity needed to keep the wheel together and connects the outer part of the wheel to the axle. The spokes are metaphors for the diversity of channels and touchpoints that can trigger a purchase. The more consumer engagement opportunities (spokes) that exist, the stronger the whole wheel (consumer journey) becomes.

- **Hub** – The hub, a central part of the wheel that rotates on or with the axle, represents the sphere of consumers devoted to the brand and who rotate in closer proximity to a future purchase by way of previous purchases, and who now engage more actively with the brand through a variety of touchpoints and channels. Moving consumers into the orbit of brand devotion is the ultimate goal in designing an integrated consumer journey experience.

The defining characteristic of today's consumer journey is increased exposure to brand touchpoints through a multitude of media channels leading to a marketplace where consumers are continually discovering and identifying brands awaiting an eventual trigger to purchase.

What are the Steps in Designing the Consumer Journey?

There are many ways to build a consumer journey and the design depends largely on the research objectives, the market and the industry. Below are broad steps to design a consumer journey regardless of those specifications:



STEP 1: Identify Your Consumer

Understand key characteristics of your consumer and how they interact with your brand.



STEP 2: Preliminary Research

Use existing data to identify emotions and frustrations in the consumer journey.



STEP 3: Hypothesis

Create a general framework of a consumer journey based on your preliminary research.



STEP 4: Understanding The Consumer Experience

Observe consumer interactions. Identify common emotions and needs that motivate your observed consumers to move from one step to another.



STEP 5: Mapping

Identify common touchpoints. Show general patterns of decision making. Outline these steps and what emotions, goals, or needs color them.

While each of these steps occurs during the consumer journey process, the objectives and actions within each step can be customized to reflect industry specifics and address each client's individual objectives. While consumer journey research is most commonly linked to analyzing the retail path-to-purchase or an assessment of in-store experiences, the methodology has extended to encompass any industry that provides a service or product to consumers. For this reason, W5 consumer journey research is methodologically agnostic covering a variety of industries and categories.

W5 takes a 360-degree approach to understanding the consumer journey, designing research that not only uncovers consumer behavior but their motivations, action drivers, emotions, and brand receptivity. W5 approaches the design and execution of each engagement with a custom research design, employing in-depth qualitative strategies to identify critical insights, audience preferences, and category needs. We take the research to people when and where they interact, purchase, and use products and brands whether in their home, in stores, during their commute, or at work.

Retail Channels and Consumer Journey Research

Consumer journey research can be conducted in multiple retail channels, including online and brick-and-mortar stores. Most consumer journey research will explore retail spaces, as consumers interact with a multitude of resources (apps, emails, texts, user reviews, store displays, advice from retail associates, etc.) from each channel, when researching products or completing a purchase.

It is important to identify all of the touchpoints that influence consumers' shopping experience and direct their path-to-purchase. Conventional wisdom suggests that if a person begins seeking a product in one place, such as a website, they will complete their purchase online; this is not always the case. Many consumers are first influenced by a trigger—an advertisement or text message about a sale—that piques interest in a product or service. The trigger sets off a chain reaction that could take the consumer online to do more research or to a retail location to view the product in-person.

Because the steps of the consumer journey can transition from one retail channel to another and back again, it has become increasingly important to explore both the online and brick-and-mortar experience. Of course, there are certain categories, products, or services where the online shopping experience may be the primary or only opportunity for consumers to engage with a brand, or where understanding the online purchase process is the primary research objective. In those instances the research would wholly focus on the online

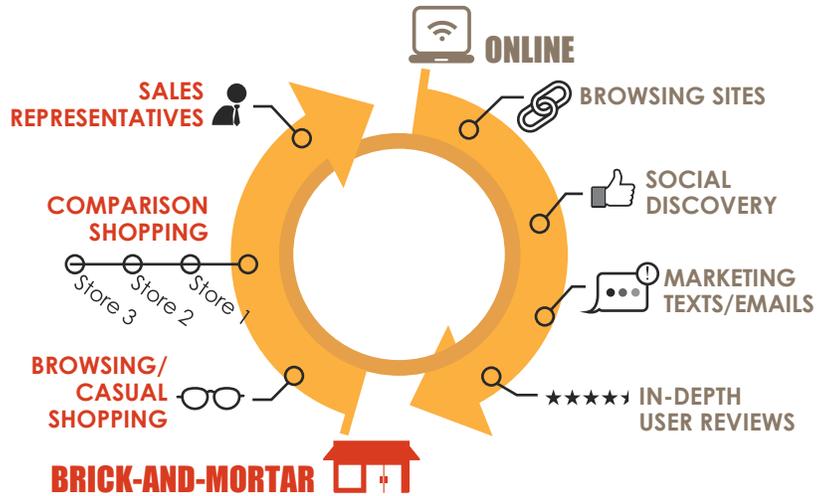
consumer journey. The same principle applies for any research initiative exclusively exploring the brick-and-mortar shopping journey.

How is Consumer Journey Research Analyzed?

Throughout all steps of the research engagement, W5 analyzes the consumer journey holistically to delineate its individual stages and determine what consumers are feeling, thinking, and doing during each stage. Through this analysis we dig for the subconscious effect of brands to understand what motivates consumers along their journey.

At W5 we investigate not only the purchase path for our clients' brand, product, or service but also consumers' shopping behaviors and interactions with competitors' offerings. Observing the consumer journey outside of a company or brand's central ecosystem allows W5 consultants to conduct a comparative analysis of the marketplace, identifying overarching category trends and themes that shape consumer behaviors and their expectations for the shopping experience.

The collection and analysis of information we gather through our multi-phased research approach is driven by understanding the cultural, category, and brand trends that influence consumer behavior specific to the client's brand. Through our analysis we also illuminate the tension and pain points consumers face during the consumer journey which result in particular decisions that lead them down a given path. Defining consumer tensions is critical so clients can work to ease pain points in a way that leads to an actively engaged consumer who can eventually integrate into that brand's sphere of brand devotion.



Channels for Exploration

STEP 1: LIST AND SORT

W5 lists all the activities, behaviors, and touchpoints in research participants' path-to-purchase.



STEP 2: ORGANIZE

W5 looks for shared themes and behaviors in consumers' path-to-purchase to create a consumer journey unique to each consumer type.



STEP 3: ANALYZE

As a final step, W5 assesses what consumers are thinking, doing, and feeling within each step of the journey. This analysis helps W5 identify opportunities to improve the customer experience at each touchpoint.



The Consumer Journey Analysis Process

What Methodologies Help Explore the Consumer Journey?

W5 explores the path-to-purchase by immersing ourselves in the world of the consumer. Certain methodologies help us explore the routines, feelings, and motivations that shape consumers' purchase decisions for products and brands through face-to-face interviewing. Others allow us to travel alongside the consumer in a virtual sense. Many methodologies use mobile technology to diagram how consumers mark rational and emotional touchpoints as they travel from home to retail stores or websites and other virtual touchpoints where they experience, learn and shop. Depending on the service or product in question and the overarching goals of the study, W5 may employ one of the following methodologies to chart the consumer journey:

Shop-Along Interviews and Retail or Online Ethnography



This methodology allows W5 consultants to interact with consumers in-store or while browsing online and observe their experiences and reactions. W5 consultants can ask questions during interactions with employees, products or digital touchpoints as well as observe how the consumer reacts to elements of retail and website design and engagement. A pre- and post-shopping interview allows consumers to reflect on their experience before and after the purchase process.

Great for in-person observation of the impact of retail, website, and customer service interactions on consumer behaviors. This type of research can be conducted in brick-and-mortar stores, in homes, or anywhere consumers engage with brands or where products and services are purchased or used.

Online Journals and Discussions



Consumers can share their experiences shopping for products and services in a personal online journal or as part of a group discussion via an online tool. Consumers can login at their convenience and answer a series of questions posed by a W5 moderator. This methodology is ideal for exploring consumer journeys for a variety of industries and products, including consumers' path-to-purchase for online transactions. There is also a mobile component (see below) that enables exploration of the role of mobile technology in the consumer journey.

This tool is flexible and can accommodate a variety of consumer journey research, including retail ethnography and path-to-purchase for online vendors. An added bonus is the ability to conduct in-depth research with a variety of consumers living in different geographical regions and time zones.

Mobile Shop-Alongs



A mobile app allows consumers to answer questions, complete assigned shopping activities (e.g. taking pictures of each section visited in a store or screen shots of websites visited), and comment on their discovery and shopping experience as it unfolds. W5 consultants can design a series of questions, activities, and prompts for consumers that encourages them to detail what they are thinking, doing, and feeling during each phase of their journey whether they are watching TV on the couch before their store visit, browsing websites on their mobile device, or examining their purchase in the car after exiting the store. Asking them to complete activities and tasks can make the study more engaging for consumers and insightful for clients.

Great for exploring the consumer journey and specific aspects of influences on decision making including product packaging, signage, website appeal, digital media, or customer service interactions. This research approach can be conducted in any retail or online environment via an internet-enabled smartphone.

Validating Consumer Journeys through Quantitative Metrics

While identifying steps in the path-to-purchase and specific points of consumer interaction with a brand or product is best suited to qualitative exploration, quantitative research can play a valuable role in validating consumer journey learning by determining the importance and influence of each step along the way. A supplemental online survey, following the in-depth qualitative research, can provide statistically reliable detail about the steps along the path-to-purchase, as well as assess overall consumer satisfaction with the experience offered at individual steps or touchpoints. Leveraging quantitative insight in consumer journey mapping helps companies identify salient opportunities to enhance consumers' experience and prioritize issues in the order they should be addressed.

Quantitative analysis of consumer journey steps is best suited for those companies or brands who:

- Desire statistically significant rigor to validate strategic decision-making
- Have multiple target consumer segments for which they want to investigate and identify differences in the consumer journey
- Seek to gauge and compare customer satisfaction with competitor brands along each step of the consumer journey to identify opportunities for differentiation and competitive advantage

STEP 1

Initial Qualitative Research

This phase holistically explores the consumer journey and establishes initial hypotheses of steps in consumers' path-to-purchase. W5 works with clients to select the best methodological approach (refer to list of potential methodologies on page 7).

OPTIONAL STEP 2

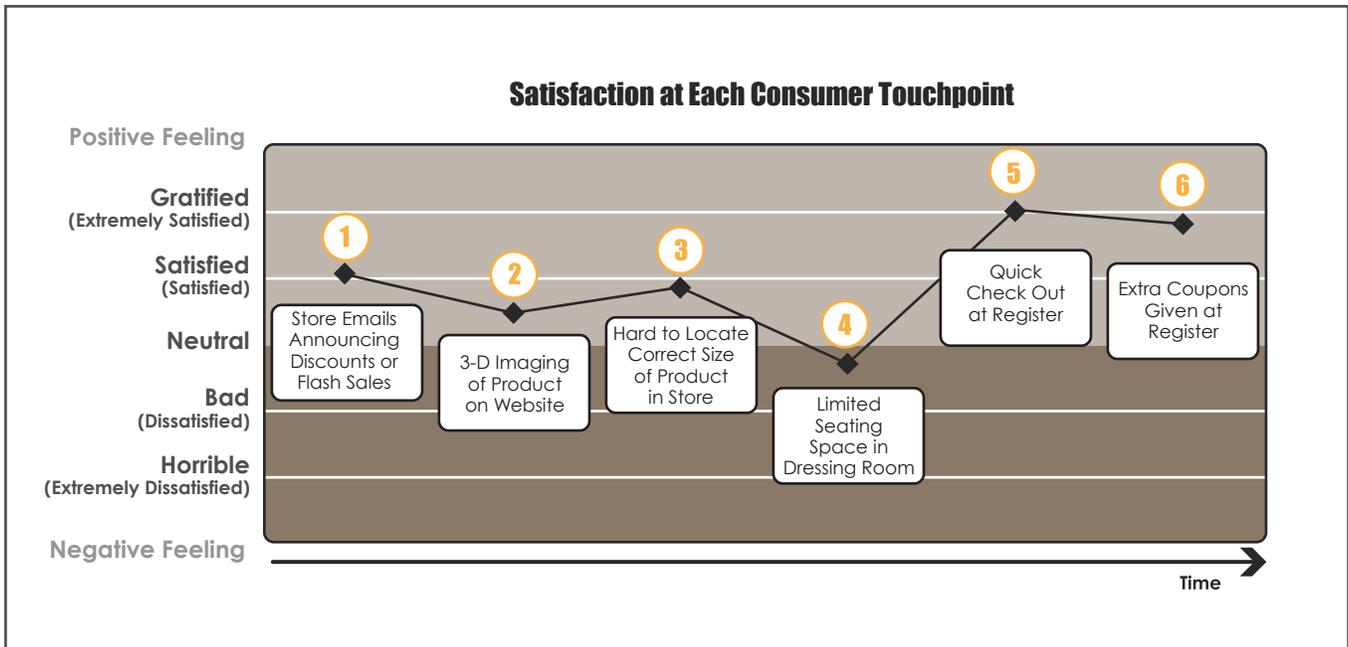
Quantitative Validation

Next, utilizing marketplace insight gained in the qualitative research, W5 can develop an online survey questionnaire including questions specific to each step along the journey. The questionnaire will assess the relevance of each hypothesized step among a broader audience to determine which steps are essential and influential. It will also ask consumers to rate their satisfaction with the client's product or service along the journey.

Recommended Dual-Phased Consumer Journey Research Approach

Understanding the Results

Once quantitative feedback is collected, W5 typically incorporates that data into a customized journey map highlighting the overall journey, comprised of individual steps and touchpoints, creating a visual representation of the findings. The following example shows how this approach may be used to visualize consumer satisfaction or delight along the journey, represented as a spectrum of feelings ranging from extremely negative to extremely positive. This type of satisfaction assessment can be applied to, for example, a shopping experience, but also individual brand or client service interactions.



Consumer Touch Point Satisfaction Analysis

There are several benefits to applying statistical support to consumer journey research, including verifying relevance and steps in consumers' path-to-purchase among a larger sample of the population and levels of consumer perception. A larger advantage offered by this type of statistical analysis is the ability to drill down and pinpoint opportunities to fine tune the branded consumer journey experience. Identifying those steps or touchpoints at which a company or brand excels and those identified as underperforming can provide a deeper understanding of how consumers engage with a brand or product and their immediate preferences for that experience. This information can help a company or brand create a branded "ecosystem" for their consumer experience where each touchpoint leads to further engagement with the brand itself.

How Does Mapping the Consumer Journey Help Fuel Strategy?

Insights from consumer journey research are most often used to develop creative and interactive strategies by defining key steps in the purchase process. By mapping out and pinpointing influences on emotional and rational decision making, and the behaviors of consumers throughout the journey, strategies can be developed that use these details to target important touchpoints in the journey. Understanding consumers' decision-making process offers brands the opportunity to develop messaging strategies that influence consumers more effectively.

Consumer journey research can reveal multiple opportunities for any brand's creative and interactive strategy. For example:

- ▶ A brand can learn they need to reduce barriers to purchase at a specific step in the consumer journey identified through research
- ▶ A brand may find that consumers express a strong desire for the brand in the exploration stage but consideration of other alternatives may increase in the lead up to purchase necessitating stronger engagement throughout the entire purchase process
- ▶ A brand might do well at the point of purchase, but may find improving strategies that increase brand awareness in the early stages of the process lead to greater conversion and revenue

Can I Use Consumer Journey Research in My Industry?

W5 can conduct consumer journey research for Fortune 500 and advertising agencies working within industries including, but not limited to:

	Apparel and Accessories National Retailer, Specialty, Big Box
	Automotive Consumers, Dealers
	Biotechnology/Pharmaceutical Consumer, Medical, Manufacturer
	Consumer Goods Food and Beverage, Health and Beauty, Household Products
	Financial Services Banking, Investments
	Food and Beverage Fine Dining, Casual Dining, QSR
	Insurance Health, Automotive, Life
	Leisure/Entertainment Hotels, Resorts, Airlines, Venues, Events
	Mobile Technology Wireless Carriers, Manufacturers, Retail Outlets

This list is not exhaustive as W5 can analyze the consumer journey for nearly any type of industry offering consumer products and services. W5 approaches each engagement with a customized approach, tailoring the research design to fit the product or service in question and the consumer audience it serves.

At W5, our consumer journey studies have resulted in understanding decision pathways for wireless phones, exploring awareness and consideration in the hot tub market, understanding purchase drivers in grocery stores, and underlining key behaviors that define a nonprofit's donors. The following case study provides an overview of our customized research approach, from designing and applying an appropriate methodology, to developing a takeaway deliverable outlining key solutions.

Case Study

Developing a Digital Strategy With Consumer Journeys

A national shoe retailer and their advertising agency wanted to develop a competitive consumer engagement strategy by understanding the shoe shopping purchase process and the increasing role digital and mobile engagement plays in the path-to-purchase. Consumer journey research was conducted to understand and develop new communication strategies when engaging consumers online, in-store, and post-purchase.

Approach

W5 developed a three-phase qualitative approach that investigated pre-shopping, shopping, and post-shopping consumer experiences and behaviors. Consumers were recruited to take part in a week-long Online Shoe Shopping Journal followed by In-Store Shop-Alongs at client and competitor stores. A week after the Shop-Alongs participants answered follow-up email questions about post-shopping/purchase behaviors and expectations.

Results

As a result of this comprehensive approach to understand shoe shopping from pre-purchase through post-purchase, W5 developed a consumer journey map detailing the major steps in the path-to-purchase and the key engagement touchpoints that influence consumers in that journey. W5 provided recommendations for creating or improving mobile, digital and traditional consumer touchpoint opportunities to attract and retain customers.



**Want to know more? Visit our website at www.W5insight.com
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