Understanding the impact of the omni-channel consumer decision journey
In Europe, online retailers are expanding 14 times faster than conventional outlets.

**Mature markets**
- Online sales
- 9.5% or more of domestic retailing

**Mid range markets**
- Online sales
- 6.5% - 9.5% of domestic retailing
Adapting to an Omni-channel Sales Environment

**PAST**
In-store optimisation

In the past companies needed to optimise their sales only in “real stores”

**CURRENT**
Cross-platform optimisation

Now it becomes crucial to optimise the assortment also for the different online retail channels and to think about both online and mobile devices
Both manufacturers and retailers need to adapt in order to stay relevant.
From the 1st moment of truth to a zero moment of truth
Key learnings have come from a number of different methodologies.

- Self Declared
  - Decision Journey Mapping
  - A – Z Scenario Testing
- Behavioural
  - Data Integration
  - Passive Monitoring
5 Key Learnings that can help you manage your presence across the consumer decision journey

- Online & Offline
- Tipping Point
- Multiple Touchpoints
- Content Control
- Price Comparison
Learning 1: Consumers exhibit different reasons to shop online versus offline

Consumers shop offline when:

- **Immediate needs**
- **Want to experience the product**
- **For convenience** (already in / near the store, etc.)
Learning 1: Both channels are important to provide a comprehensive decision journey

Consumers shop online when:

- Need to save time
- Wider selection of products
- For convenience (can shop at any time)
Learning 2: 1/3 of consumers reach their tipping point at their first touch point

Especially when shopping online, the zero moment of truth (ZMOT) is crucial
Learning 2: Search positioning can often be the first touch point

While it has become less important than it was 10 years ago, the #1 organic listing is still clicked on most often (32.8%)
Learning 3: On average, consumers still have 4 touch points before making a purchase

- Ask friends & family
- Product information at specialty retailers
- User-generated content (videos on YouTube, reviews, etc.)
- Online searches
Learning 4: Products clearly showing the product have higher probability of choice. Online there is more freedom to play with creative imagery.

BRICK & MORTAR
There is only the “real product”

ONLINE
Help shoppers see the benefits of your product
Learning 5: Price comparison engines give the opportunity to attract new customers

Google Shopping

[Image of Google Shopping search results for iPhone cases]
Learning 5: **Good reviews command a higher price**

If your review score increases with 2.5, you can increase your price with 20% without losing preference share.
5 Key Learnings that can help you manage your presence across the consumer decision journey

Consumers view online & offline channels as complementary paths, meaning both should be given equal importance.

It is vital to understand the first potential consumer touch point, to ensure you capitalise on a key opportunity to win their favour.

There are a plethora of potential touch points across decision journeys, and understanding which are most important can signal where to focus efforts and budget.

Many content constraints that exist in a physical store are eliminated online, giving an opportunity to better manage what is communicated.

Price is continuing to grow in importance, but there are ways to alleviate pressure to avoid entering a constant pricing war.
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