

RESEARCH METHODS FOR UNDERSTANDING CONSUMER DECISIONS IN A SOCIAL WORLD

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WHAT'S IMPORTANT IS THAT THIS CUSTOMER DECISION JOURNEY MODEL PROVIDES A FRAMEWORK THAT ENABLES MARKETING, RESEARCH, BRAND, DESIGN, AND CONTENT PROFESSIONALS TO FOCUS THEIR EFFORTS. IT IS ONE THING TO SAY THAT SOCIAL MEDIA AND POST-PURCHASE ENGAGEMENT WITH THE BRAND IS IMPORTANT; IT IS ANOTHER TO SAY EXACTLY WHAT THE SPECIFIC TACTICS AND CONTENT EFFORTS SHOULD BE FOR A GIVEN COMPANY, IN A SPECIFIC CONTEXT.

In a recent issue of the Harvard Business Review that focused on branding, David Edelman articulates how consumers' engagement with brands is evolving with the proliferation of social media and other digital channels. In the article "Branding in the Digital Age: You're Spending Your Money in All the Wrong Places," he proposes a model for consumer and brand engagement titled the "Customer Decision Journey." Edelman's Customer Decision Journey model recognizes that consumers' experiences increasingly include online components, where their experience of considering and evaluating choices is constantly shifting and their engagement with a brand continues after making a purchase through social media channels.

Edelman's article goes on to discuss how marketing teams should shift their focus to researching and supporting the advocacy and bonding portion of the consumer engagement lifecycle. While Edelman wrote his article with marketing professionals as the intended audience, I was struck by how similar the marketing perspective is with the goals of User Experience (UX) groups. Ultimately, the goal is to understand the entirety of the consumer experience, so we can make the most informed decisions about online strategy, content, and positioning.

In this column, I'll first summarize the findings from Edelman's article, then discuss how we can apply traditional user research methodology to supporting changes in marketing strategies.

SHIFTING PARADIGMS

If you are familiar with traditional marketing models, you're probably familiar with the purchase funnel metaphor, shown in Figure 1. Marketing first makes consumers aware of different purchasing options through exposure to ads and other forms of push marketing. Consumers start a purchase process by considering a wide variety of options, then continually narrow their options—according to their needs and preference—until they ultimately make a decision to purchase. In this traditional model, the post-purchase experience focuses on use.



Figure 1—Traditional purchase funnel metaphor
Harvard Business Review Dec. 2010

Edelman's model recognizes the role of digital channels and social media in marketing today. With the availability of customer reviews, discussion forums, and other information sharing, the purchase process is more dynamic, influenced by others, and cyclical. Edelman's Customer Decision Journey still includes consideration and evaluation phases, but the nature of those phases is different: consumers continually add and subtract

UX PROFESSIONALS HAVE A VAST TOOLKIT OF RESEARCH TECHNIQUES THEY CAN LEVERAGE TO HELP THEIR TEAMS UNDERSTAND THE CURRENT STATE OF THE CUSTOMER JOURNEY AND THE EXPERIENCE TO PROVIDE INSIGHTS INTO HOW TO LEVERAGE SPECIFIC CHANNELS.

options as they research online. Additionally, his model suggests that the kind of information consumers seek is changing. Consumers are more likely to seek out and trust information from other consumers rather than from their opinions based on the information marketers push to them.



Figure 2— Edelman's proposed consumer decision journey
Harvard Business Review Dec. 2010

The cyclical nature of the Customer Decision Journey also includes activities that occur after a sale. Different from the traditional model, the post-purchase period includes a “loyalty loop,” in which consumers engage in a dialogue with the brand and contribute opinions and information on their experience. While not every consumer participates in content contribution, those who do may demonstrate a deep connection with the brand and have the ability to greatly influence other’s perceptions of it. When they do contribute, consumers post reviews, ask questions, and share their experiences through social media channels such as Facebook, Twitter, and discussion forums.

THE ROLE OF USER EXPERIENCE

So what’s the importance of all this as it relates to UX professionals? After all, it is not a revelation to state that customer reviews and social media mentions have more impact now than they’ve had in the past. What’s important is that this Customer Decision Journey model provides a framework that enables marketing, research, brand, design, and content professionals to focus their efforts. It is one thing to say that social media and post-purchase engagement with the brand is important; it is another to say exactly what the specific tactics and content efforts should be for a given company, in a specific context. For example:

- How should a company design their Web site and other properties they own given the experience consumers are having outside these channels?
- What topics and information should a company contribute to customer-created channels, if any?
- Given all of the various touchpoints a customer has with a company’s brand, which are the most important and should receive the most attention and resources?

Understanding the entirety of a person’s interactions with a product or service is what UX professionals are trained to do. As such, I believe we are well-suited to contribute to the collective understanding of the loyalty and advocacy portions of the customer engagement lifecycle. UX professionals have a vast toolkit of research techniques they can leverage to help their teams understand the current state of the customer journey and the experience to provide insights into how to leverage specific channels.

Additionally, positioning this research within the context of a greater customer experience plan gives UX professionals a framework that lets them work closely with marketing, brand, and strategy teams and potentially have a greater impact on an organization as a whole.

USER EXPERIENCE RESEARCH TECHNIQUES FOR LOYALTY AND ADVOCACY

To research consumer behavior, the natural inclination of user experience researchers may be to turn toward trusted, reliable methods that have worked for other purposes—for example usability testing, focus groups, or even ethnography. However, for a number of reasons, these techniques may not be the best choice. While task-based usability studies are good for finding usability problems that we can fix, they are not as good at uncovering customer attitudes or their long-term decision-making process. Competitive site evaluation through triading or other means can perhaps give a bit more insight into how a

customer would leverage different Web sites, but the data is limited to the sites you include in your study and there is still an emphasis on task completion. Ethnographic research reveals similar insights about the Customer Decision Journey; however, the observational nature of this method is difficult to maintain over the long lengths of time necessary to evaluate decision making, and this approach doesn't consider the specifics of a participant's decision-making process.

Fortunately, there are other techniques that are familiar to user researchers that are a good fit for researching the Consumer Decision Journey. These methods are not new, but if we refine them to focus on a consumer's experience throughout a decision journey, they become powerful new tools. These techniques include the following:

- **Cultural probes**—This technique addresses the challenge of studying a process that takes place intermittently or over a long period of time. Researchers brief selected participants on the objectives of a study and give them a kit for recording their actions and thoughts. Also known as diary studies, cultural probes include periodic follow-up interviews, during which the researchers review kit materials and ensure participants are collecting the right type of data. [Pabini: Have I caught your meaning here?]

There are a number of resources available in the user research literature on cultural probes or diary studies. If you're using such studies for research focusing on customer purchase decisions and the influence of social media channels, the diary kit should include explicit sections for capturing the social-media sites participants visit, the product reviews they read, and other resources participants consider.

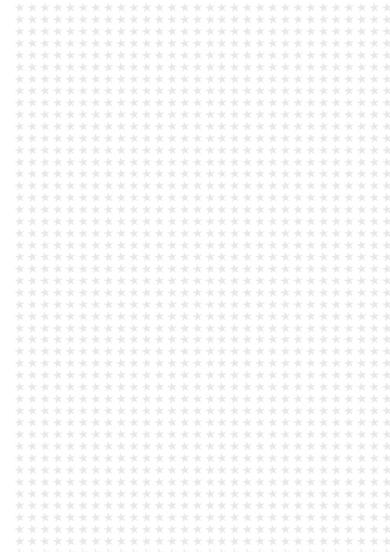
The key for this type of study is to make it as easy as possible for participants to record

their activities. In a recent consumer decision-making study, I asked participants to record any thoughts, activities, or comments, using a voice recorder on their phone, then gave them a simple worksheet to record Web sites, social media channels, and searches they performed relating to a product purchase. Participants appreciated the simplicity and ease of use of this data-capture method.

- **Unguided experience observations**—Similar to traditional usability testing, this method involves inviting participants to a laboratory, or controlled environment, and observing their behavior. However, the difference for this application of the technique is that the moderator does not provide a series of tasks for participants to complete using a defined set of designs or prototypes. Rather, a researcher directs participants to use all of the information available to them on the Internet to make the best purchase decision possible. As participants explore and search for information they think will help them, limit interruptions and probing questions.

Through the course of participants' navigation and exploration of the Web, the researcher records and notes various searches, the time and attention participants pay to different sites, and their overall strategy for product research. Following participants' exploration—which may vary in duration—the researcher then asks participants a series of questions, with the goal of understanding participants' motivation for various steps in the process.

The advantage of this method is that the researcher can observe participants' experiences directly as they explore the full breadth of resources available to them on the Internet. Additionally, by inviting participants to a lab, the researcher can complete a study using unguided experience observations more quickly than using cultural probes, and thus, complete their data capture



more efficiently. The obvious drawback of this approach is that the research may not consider how a consumer's mind can change through a lengthy decision-making process or be influenced by friends and colleagues over the course of time.

- Social-media monitoring—Another way of researching and learning about the Consumer Decision Journey is to listen to the people who are most highly engaged in social-media circles—whether for good or bad—the influencers. Although the social-media monitoring approach doesn't involve actually interviewing these influencers or engaging them in usability lab exercises, it does give user researchers a real-time view of how the purchase cycle plays out, what types of information contribute to consumers' final purchase decisions, and the overall level of trust consumers place in particular information channels and individual content contributors.

To start, get an idea of the social-media landscape and identify where you need to be listening. Think about what channels—Twitter, Facebook, LinkedIn, YouTube, blogs—are most active in relationship to your particular product space and, therefore, most pertinent to your research. Identify relevant keyword phrases and search terms; they can help you ferret out the most important chatter. Free engagement tools and platforms like Hootsuite and TweetDeck can help you monitor and listen to conversations in real time. Regular monitoring of your target landscape gives you a feel for the level of pull social media—a relatively new addition to the decision journey—has on a community and the overall ebb and flow of the conversations surrounding a brand, topic, or trend.

Where do you find the influencers? You'll definitely see them pop up as the most active participants in your overall product landscape, but you can use some additional tools to help you do the digging. Sites like mrtweet.com can help you find passionate users as can the

Twitter suggestion engine or Facebook search. You can identify influence by numbers of posts and followers. Also, look at individual posters with an eye to how many people like their comments. Social-media monitoring tools like Radian 6 let you view assigned influencer values for particular people and, based on a series of metrics, even grade particular posts as positive or negative for the brand. Setting up alerts on sites like socialmention.com, delivers influencers to your inbox.

The main reason for identifying influencers is to figure out what they are talking about. These content themes can be crucial to informing site-content decisions, brand-messaging initiatives, and even internal organizational and marketing decisions. The greatest benefit of the social-media monitoring approach is that you have an infinite pool of research subjects who you can observe while they are in the midst of the Consumer Decision Journey. You aren't asking interviewees to walk through what they would do; you are experiencing it in real time.

CONCLUSION

It's no secret that people's purchase decisions are more highly influenced by social media and other digital channels now than ever. As the social-media landscape continues to evolve, UX professionals should adapt their existing user research methods and develop new techniques that allow them to best understand consumers' decision-making process in the social environment. By expanding and refining our research toolkit, we can position ourselves as partners with marketing organizations and social media specialists to deliver customer insights that inform specific UX initiatives.

Resources

Edelman, David C. "Branding in the Digital Age: You're Spending All Your Money in All the Wrong Places." [http://hbr.org/2010/12/branding-in-the-digital-age/ar/1] Harvard Business Review, December 2010. Retrieved March 4, 2011.