



The Customer Journey and Anticipating Needs



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In This Session



The New Consumer Journey Is Complex

Making sense of how to engage with your target consumer has never been trickier.



Anticipating Customer Needs Throughout The Journey

Same search terms, different emotions.



Your Customers Use Video Throughout Their Entire Journey. Do You?

Video can help create demand & also fulfill it



Emerging New Media Channels

Marketers need to be more informed than ever about where to connect with consumers.



Customer Journey Mapping

Steps you and your team can take to start journey mapping.

The background of the slide features a blurred image of business-related items: a tablet computer, a pen, and several sheets of paper with colorful line and bar charts. A semi-transparent diamond-patterned grid is overlaid on the entire image.

the **xcite** group

The New Consumer Journey Is Complex

As touchpoints, channels and choices continue to expand, consumer journeys have become messier, resembling a chaotic scavenger hunt.

Performance channels are being used as upper funnel ones, while shoppers jump between online and offline worlds. For marketers, making sense of how to engage their target customer has never been trickier.

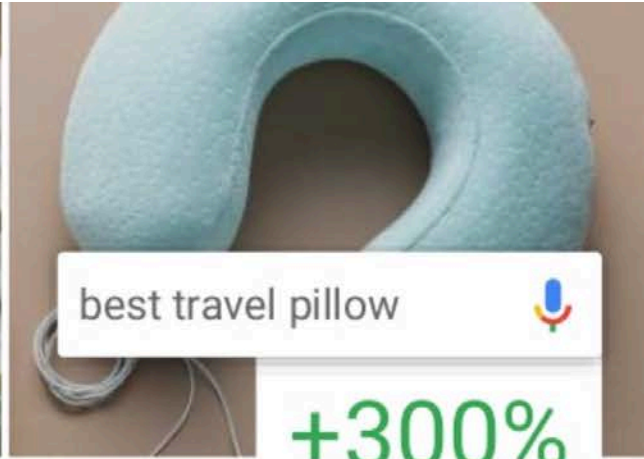




best olive oil



+110%



best travel pillow



+300%



best toothbrushes



+100%



best umbrellas



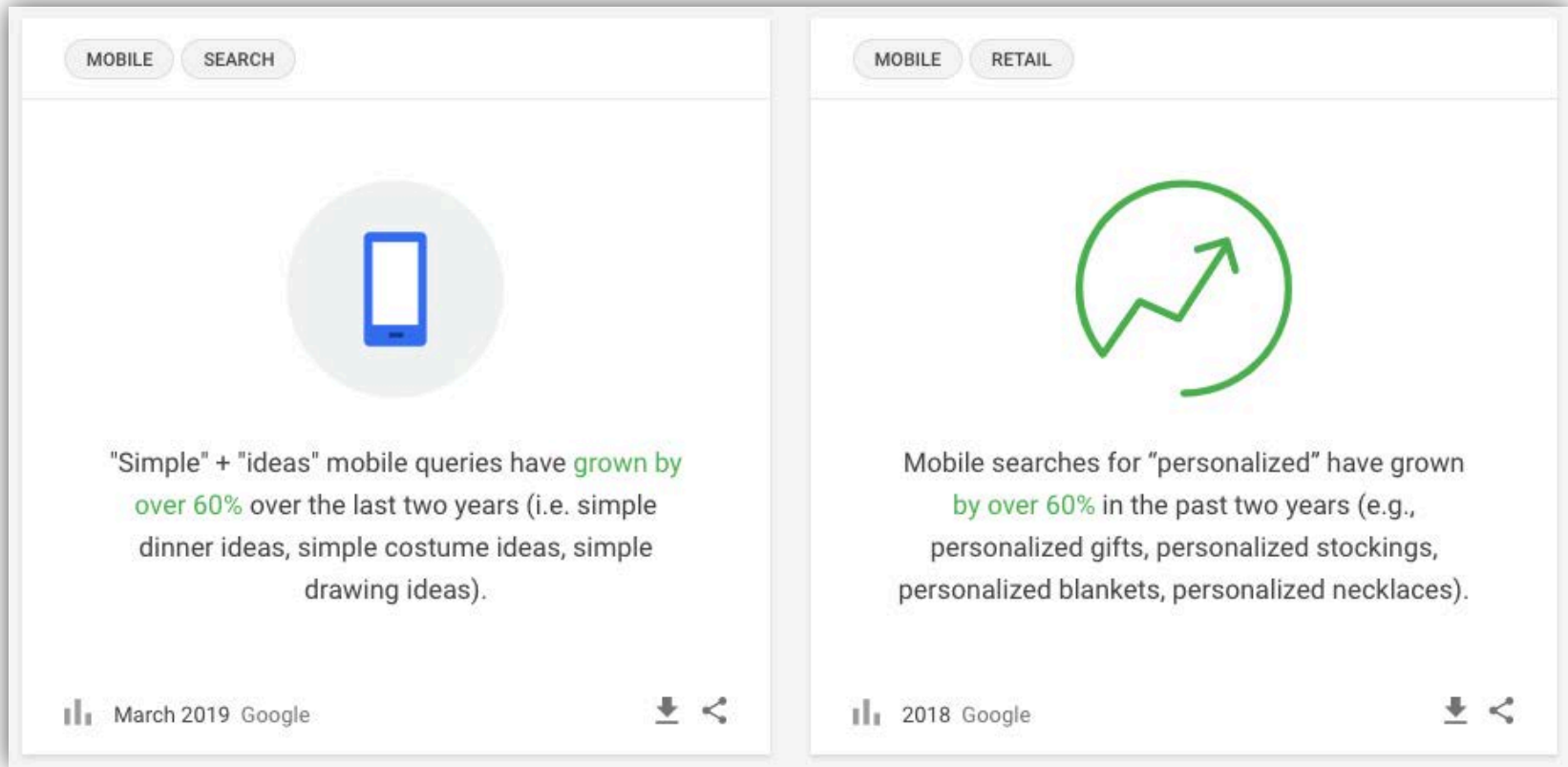
+150%



best shower curtains



+100%



Marketers often think of search as a lower-funnel channel. But people are just as likely to search early in their journey for ideas, inspiration and deals.



2x

increase in
same day shipping
searches

150%

increase in
travel searches for
'today' and 'tonight'

3x

increase in
'open now' searches



of smartphone users expect to get **immediate information** while using their smartphone.

Think with Google

Google/Ipsos, U.S., Playbook Omnibus 2019, n=1,610 U.S. online smartphone users, A18+, Jan. 2019.

The winners will be those that save people time and get them what they want as quickly as possible.

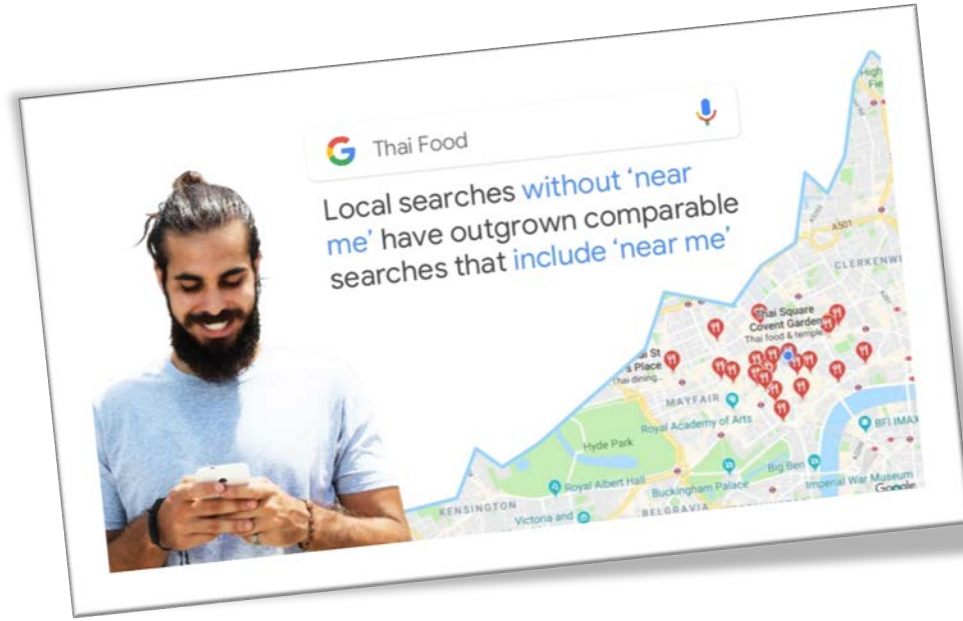
Satisfying immediacy is often more important than loyalty.



“Best” + “right now” mobile queries have grown **by over 125%** in the last two years (e.g., best online sales right now, the best phone out right now, best stocks to invest in right now, best suv lease deals right now).

Think with Google

Google Data, U.S., April 2016–March 2017 vs. April 2018–March 2019.



Last year, here at AO, we reported a dramatic decrease in the number of simple searches with “near me” in the query.

One year later, searches for “things to do near me today”, “things to do near me this weekend”, “family activities near me”, “where to buy” + “near me” and “store open near me” have grown by over 250%!



More Curious, Demanding And Impatient Than Ever Before



Regardless of their unique personal habits, their goals are all the same – consumers need to get an experience optimized for them.

Growing demand means higher requirements for brands. But any brand can be prepared for it. On reacting to these customer shifts, brands must make the most of every customer interaction to adapt. It's time to reposition your brand's role in consumer decision making.

Leading brands are winning over consumers by personally connecting with them and being helpful in their moment of need. Building meaningful customer relationships is the key to unlock long term value for and boost the bottom line.

Anticipating Customer Needs Throughout The Journey

Same Search Terms, Different Emotions

Marketers invest a lot of money, time and resources in an attempt to uncover and anticipate consumer intent. A key to understanding that intent is getting at the underlying needs that drive it in the first place.

Search would seem an obvious place to start. People are literally typing their needs into a search field.

But understanding the connection between a consumers' needs and their search behaviors involves more than just the words they use.





In constant contact with one device or another, people expect immediate answers. The things they search, the sites they visit and the videos they watch are not only expressing intent, they're reshaping the traditional consumer journey.

But what about the underlying consumer needs that drive intent in the first place? After all, you don't wake up feeling intent. You wake up feeling a need or a want. It's clear in the way we talk: "I need something." "I want something." And even in the way we search. As we saw earlier, that sort of conversational language is increasingly being used in search queries.

6 Emotional Needs States

We need to get at the emotional state behind the needs. Each need state is made up of a combination of emotional, social, and functional needs. The truth is, decision-making is not a rational process, but one driven mainly by how people feel. The rational brain layers on reasons for our choices only after they're made.

Thrill Me

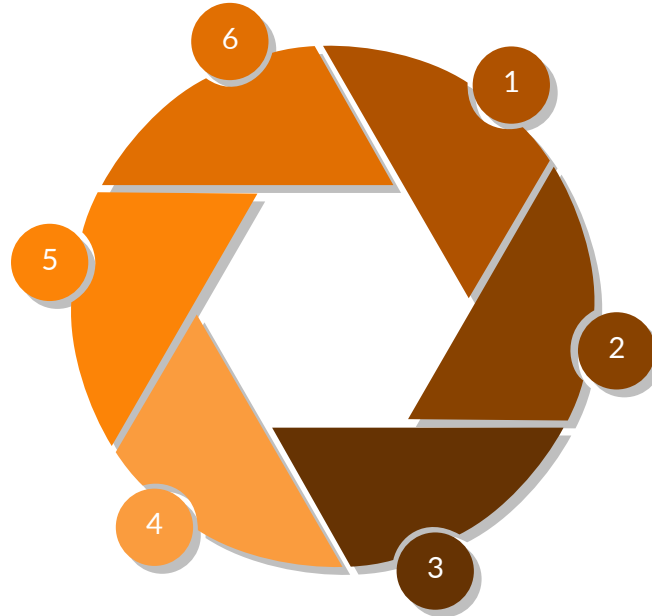
Impress Me

Educate Me

Surprise Me

Help Me

Reassure Me



Shoppers' Needs & Emotions Are Unique

"Near me" is a common phrase that pops up in searches across all categories. Whether at home or on the go, shopping for something small or large, people often want to know the closest options for activities, services and stores.

Let's take a look at two women in their 50's who were shopping in entirely different categories, one in travel and one in auto, both of whom used the same phrase but for two very different reason.



126-day journey

Over 2,000 touchpoints

Name: Beth

Age: 57

Location: Washington (State)



Our travel searcher, “Beth”, had a journey made of multiple conversions with over 2,000 touchpoints. But we are going to focus on a secondary journey involving a trip to Niagara Falls, because it included interesting search behavior after she’d arrived at her destination.

Six months prior to her trip, Beth started using search to research hotels and points of interest. But it wasn’t until she was at Niagara Falls that she searched for **“things to do near me today.”** This tracks with the “Thrill Me” need state. We’ve found these searches are typically brief, using a few words. Beth is clearly seeking inspiration for things to do in the area, since her search was followed by more than 90 page views at a travel review site related to activities and attractions in London, Ontario. Travel-related, thrill-me-driven searches are also more likely to be carried out on mobile.

Searching For Experiences Travel Study - Google

To further this point, Google conducted a travel study specifically around tours and activities. They found that almost half of experiences bookings - 48% - are happening once travelers arrive at their destination. The majority of those in-destination searches happening on mobile. They study also found that the tours and activities sector is growing faster than the total travel market. By next year, it will grow to \$183 billion.

See the full study here: <https://www.thinkwithgoogle.com/consumer-insights/travel-experience-marketing/>



48%

of experiences bookings are happening once travelers arrive at their destination.

Our auto searcher, “Mary”, was on the hunt for a new SUV. She did a considerable amount of research. In a single day, she researched seven SUV brands. After she appeared to choose a particular brand, she submitted a request to connect with a local dealer for pricing. Mary also used “near me” during her search, specifically for **“car dealerships near me open on Sunday.”**

Interestingly, this was an upper-funnel search that occurred almost six months ahead of submitting a request to connect with the local dealer. The need state behind this “near me” search is most likely to be reassure me. Mary wanted to be sure that a dealership would be open when she needed it to be. It also indicates that, for auto shoppers, dealer visits aren’t necessarily lower-funnel activities – these visits occur throughout the journey. It’s worth noting that 62% of car shoppers continue to research while on the dealer lot.

64-day journey

Over 200 touchpoints

Name: Mary

Age: 56

Location: Florida



What Does This Mean For Brands?



Avoid one-size-fits-all content. These two shoppers aren't unique. Outside these two specific journeys, data shows that travel searches including the phrase "near me" are more likely to be associated with the thrill me need state, whereas auto searches are more likely to be related to reassure me.

This means that marketers should tailor messaging to the need being expressed in that moment. So a travel marketer's content designed to respond to a "near me" search driven by a thrill-me need state should be different from content designed for someone who is in the planning stages, likely driven by the educate-me need state. You should be widening your focus beyond branded search terms and terms that are always associated with your category. After getting to know the need states, think through which keywords would signal which states for your category. Then serve multiple pieces of ad copy and destination links to see which ones drive better outcomes.

How Consumer Needs Drive Search

It may be easy to think that search would be dominated by the Educate Me need state because search is inherently an information exchange. But research has shown that search behavior is driven by all six needs.

And those needs have a profound impact on search. How long the query is. How many times a person hits the back button. How many tabs a person has open. Which device they're using. The number of search iterations. Whether a person prefers text, image, or video results. How many different things they type into the search bar.



How Consumer Needs Drive Search

The search query “What car should you drive if you make \$150,000?” provides a great window into the Impress Me need. One that will reinforce a sense of status and importance. It’s not just big ticket items, however. Also falling into this category are people who search for rewards for small occasions; like a fancy brand of coffee. You’ll also see this need emerge in travel searches for premium experiences.

Or take the Reassure Me state. A shopper with this need is searching for simplicity, comfort, and trust. Their searches tend to be uncomplicated and they rely on questions. And because there is an element of anxiety to these searches – fear of making the wrong decision or missing out – they also appreciate a guiding hand, like when Google suggests related searches or videos showing the product being used. Picture someone doing a home-improvement project.



How The 6 Needs Relate To Search

Surprise Me

Search is fun and entertaining. It is extensive with many unique iterations.

Thrill Me

Search is a quick adventure to find new things. It is brief, with just a few words and minimal back-button use.

Impress Me

Search is about influencing and winning. It is laser focused, using specific phrases.

Educate Me

Search is about competence and control. It is thorough: reviews, ratings, comparisons, etc.

Reassure Me

Search is about simplicity, comfort, and trust. It is uncomplicated and more likely to include questions.

Help Me

Search is about connecting and practicality. It is to-the-point, and more likely to mention family or location.

Satisfying Needs Leads To Growth

- We know that searches don't simply happen at random moments. They're driven by needs. The search to satisfy these needs is an inherent part of people's decision-making processes. And it turns out these emotional drivers are largely consistent across categories.
- Marketers tend to think of search as purely transactional, something near the bottom of the traditional marketing funnel. But with the marketing funnel changing, so should marketers' approach to search. Emotion should inform our thinking when it comes to search.
- Successful marketing should aim to fulfill people's needs each step of the way. But marketers can't assume that one-size-fits-all content will work. By understanding the emotions driving people's actions, marketers can anticipate the needs that drive their searches – and address them.
- At its core, marketing is figuring out how to solve people's needs. The more needs you solve and the more often you solve them, the more growth you'll see.



*Your Customers Use Video Throughout
Their Entire Journey. Do You?*



Over 90%

of people say they discover new brands or products on YouTube.¹



More than half

of shoppers say online video has helped them decide which specific brand or product to buy.²



Over 40%

of global shoppers say they have purchased products they discovered on YouTube.³

A New Way To Think About Online Video's Role In The Purchase Funnel



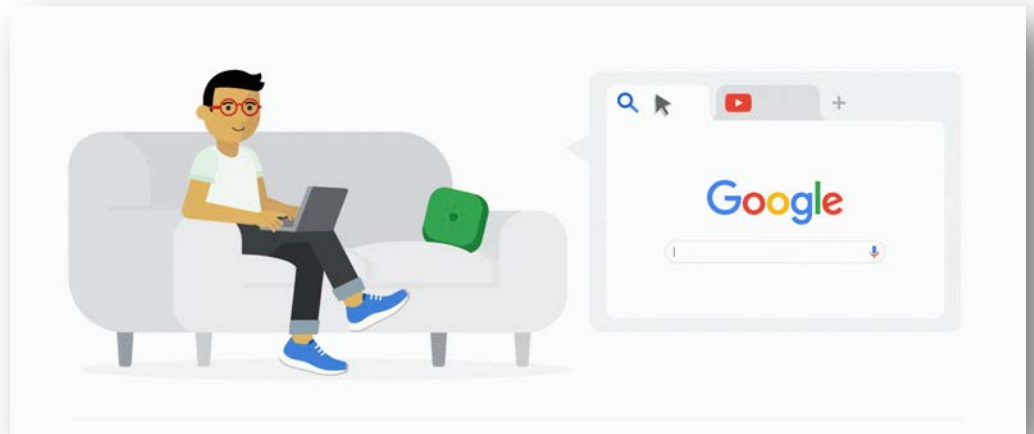
We're all aware of the new reality: today's consumers are in complete control of their path to purchase and the number of touchpoints have proliferated. People move seamlessly across channels and devices – from discovery to consideration to conversion – on their own terms. But what may come as a surprise is the outsized role that online video now plays. It can help create demand and also fulfill it.

Marketing success has always hinged on building meaningful customer connections. But the formula for achieving it – largely driven by consumer behavior – is constantly evolving.

Search to Video and Back Again

Marketers often think of search and video as two distinct channels that require different strategies and even separate teams. But people don't experience them in silos at all. They use them together as critical resources on their path to purchase.

Here are three things we've learned about the interconnected role of Google Search and YouTube in the customer journey, how essential both are for people seeking product information, and how marketers can use one channel to influence the other.



1. People move through the purchase journey on their own terms, seamlessly switching between search and video.



of people say they typically switch between online search and video when researching products to buy.

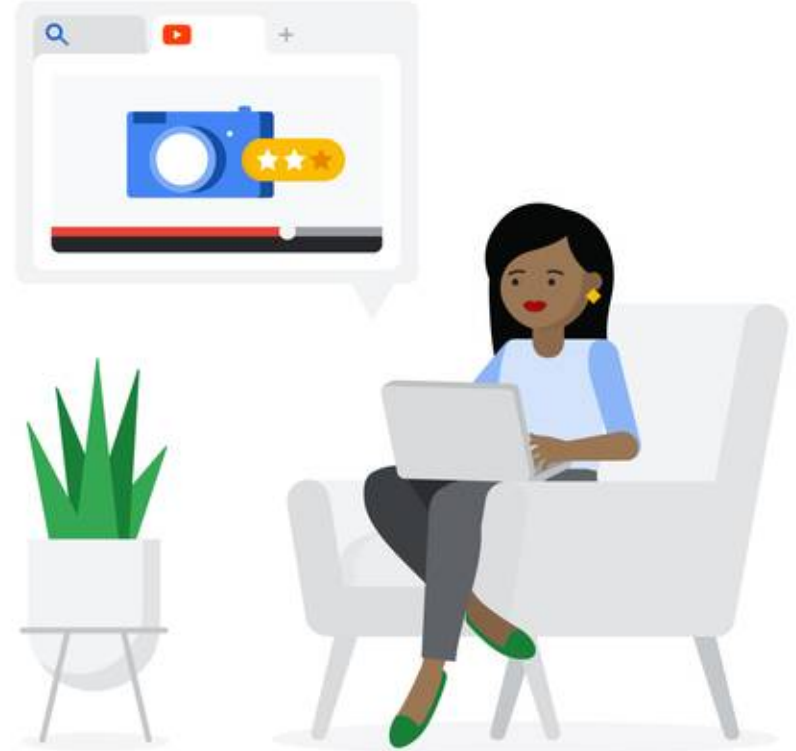


of people search for a product on Google, and then learn more by going to YouTube before they buy it.

2. People use video to learn more about a product .

Top reasons people watch a video after a search

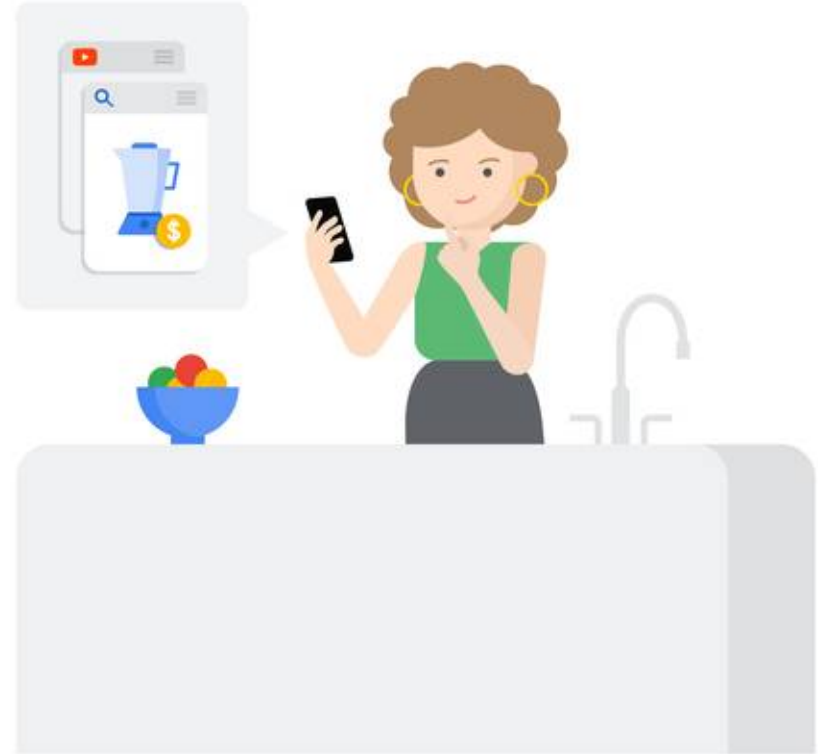
- 1 See a product before they buy it or see how others have used it.
- 2 Learn more about a product they have in mind.
- 3 See credible, authentic reviews.



3. People use search to understand all aspects of a product.

Top reasons people search after watching a video

- 1 Compare prices or brands.
- 2 Find out where to buy a product (e.g. a website or store).
- 3 Learn more about a product they have in mind.



Search, Video and Your Brand

Our research shows that, on average, advertisers who run YouTube video ads in addition to Google Search ads see 3% higher search conversion rates and a 4% lower search cost per acquisition compared to advertisers who run Google Search ads alone.

What does this mean for your own plans? Since people don't think of search and video in siloed terms, neither should you. By approaching them holistically, you'll ensure you're reaching people wherever they are in the journey, and you'll get more out of both channels.

- **Approach Brand and Performance Goals Holistically**

A great video can lift brand awareness, while also providing a clear path to purchase. Develop creative assets that introduce your brand and explain the service to drive upper funnel goals, but also add direct-response elements to your videos, through clear calls to action, driving users to your site and sign-up pages.

- **Identify Your Best Customers**

Compelling, action-inspiring video ads can help set you up for success. But you're missing an opportunity if they don't reach the right people. Developing a plan that leverages audience intent signals will help ensure that doesn't happen. Create custom intent audiences, based on who is searching for relevant keywords to ensure the content is reaching and helping the right people at the right moments.

- **Meet Your Audience Where They Are - <https://www.thinkwithgoogle.com/advertising-channels/video/adidas-marketing-case-study/>**

It's true that audiences control the path to purchase, but with online video, you can create a compelling path for them to follow whenever they're ready. Brand and performance goals can be tackled simultaneously with online video. Video can capture people's attention, move them from inspiration to consideration, and encourage them to take action. By creating a holistic video strategy, you can help deliver short-term performance goals as well as long-term brand equity.

How to create an effective video ad for every stage of the customer journey



Attract

Attract attention from the start. Like any good story, front load the most interesting piece of key hook right at the beginning.



Brand

Brand naturally and with purpose. Think of how to incorporate your brand into the story in a way that engages your desired audience.



Connect

Connect through emotion & storytelling. Use both visuals and audio to reinforce your key brand message.



Direct

Direct the viewer what to do next. In your story as well as with CTA extensions, tell the viewer what you want them to do next.

Creative factors that contribute to campaign success



1

Tightly framed subjects

Tight frames and subjects breaking the fourth wall and speaking directly to the viewer work well.



2

Memorable visual elements

Memorable visuals and audio help grab people's attention and keep them engaged in your story.



3

People who are core to the story

Videos that make people core to the story are impactful and viewers are drawn to and relate to other people.



4

Brand introduced in the first five seconds

Introducing your brand or product within the first 5 seconds is a must.



GO
—
BE
YO
ND

Emerging New Media Channels

New Media Channels Are Emerging

From growing use of podcasts and online video to newer technologies like augmented reality and voice, the media landscape continues to evolve. The people marketers are looking to engage have never been more connected. But it can be hard to know exactly where they're spending time online. As media consumption habits change, marketers need to be more informed than ever about where to connect with customers.

People are increasingly turning to image search for ideas and inspiration.



Mobile searches for "image search" have grown
by over 60% in the past two years.



of online shoppers say images inspire
them to purchase.

Other forms of media consumption, from voice to podcasts to online video on TV are growing in popularity.



of the global online population is **using voice search** on mobile.



Watch time of YouTube on TV screens now tops **250M hours per day globally.**



Mobile searches for "podcast(s)" have **grown by over 80%** in the past two years.

Smart speaker usage is growing as they become more connected to users' lives

4X

Active users of the Google Assistant grew **4X** over the past year.

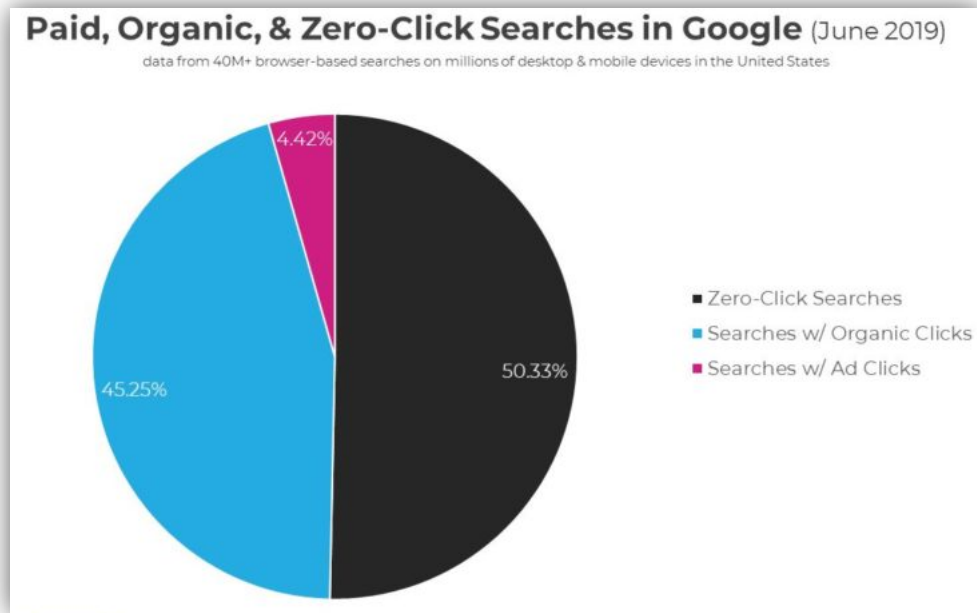


People used **Google Home devices** to look up over 16 million recipes last holiday season, with over a million of those searches happening on Christmas day.



The Google Assistant is now built into more than **1 billion devices**.

Over half of searches on Google yield zero clicks



Zero-click searches result in users remaining on a Google-owned property such as Google.com, Google Images, Google Maps, YouTube and Reserve with Google rather than moving on to a third-party website from an organic search result. The most literal definition is a search that results in zero website referrals, i.e. no web property receives a visit from the search.

What's a smart marketer to do?

- Find ways to get value from zero-click searches*
- Get your content optimized on Google's own properties (YouTube, Maps, Images, AMP, Knowledge Panels, etc.)*

Next steps for search marketers

Marketers should continue to optimize their websites as per usual, but the key takeaway from this new data is to diversify.

The continued ubiquity of mobile devices, voice search and voice assistants, and the ever-increasing trend of platform-centered browsing and searching (for example, walled gardens like Facebook and Amazon) are creating a dilemma for content creators and business owners – that is, how do we get people to leave these walled gardens and visit our websites?

The answer to this question is different for every business, but a good first step is to diversify where you place your ads and publish your content.

Have a solid social media marketing strategy that's tied to a robust content strategy which includes a variety of content types. For example, video, blog posts, social posts, whitepapers, webinars) and promote this content widely and often.

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Customer Journey Mapping

Mapping Your Customer Journeys



In an ideal world, the journey people take to become loyal customers would be a straight shot down a highway: See your product. Buy your product. Use your product. Repeat.

In reality, this journey is often more like a sightseeing tour with stops, exploration, and discussion along the way—all moments when you need to convince people to pick your brand and stick with it instead of switching to a competitor.

Staying on top of all of these moments might seem overwhelming, but mapping your customer's journey can help. It can give you and your team a greater understanding of how your customers are currently interacting and engaging with your brand, and also help illustrate how your products and services fit into their lives and aspirations.

Let's take a look at five steps your team can take to start journey mapping.

1. Find the sweet spot where your customers' goals and your own align

Before you start journey mapping, nail down your business goals. Any marketing and communication you deliver during the customer journey should be focused on helping your brand reach those goals.

However, it's important to acknowledge that your customers' goals might be different from yours. For example, let's say your goal is to sell more sunglasses with new, improved lenses that have a better profit margin. Meanwhile, your customers' top concern might be getting sunglasses that match their personal style. Lens protection could be their second or even third priority.

Consider how your marketing and communication strategies can help your customers reach their goals while also getting you closer to yours.

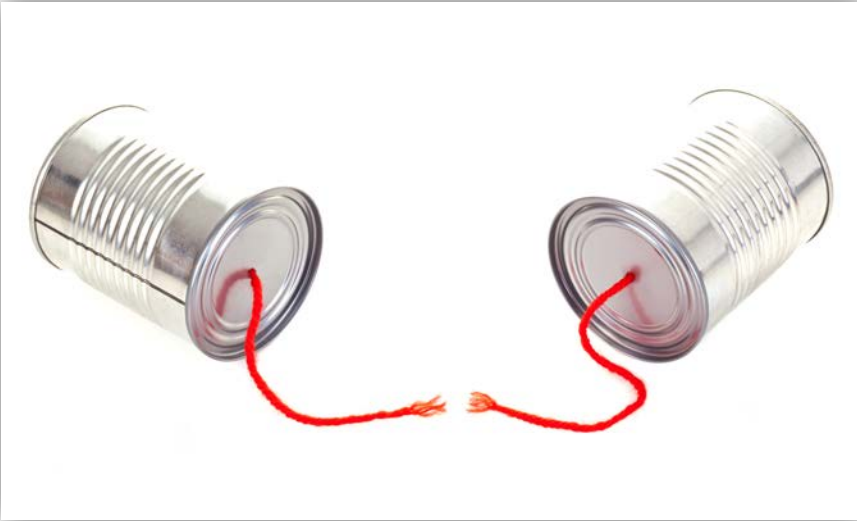


2. Identify all of the communication touchpoints in your customer's journey

When do you traditionally communicate or engage with customers? Make a list of these moments and group them based on when they happen during the journey: pre-purchase, purchase, and post-purchase.

Now find communication touchpoints you may have missed. Track what actions and interactions between your brand and your customers happen just before and after each of the pre-purchase, purchase, and post-purchase stages.

For example, you might decide that a major moment in your purchase stage is when your customers are guided through your website to buy an item in their shopping cart. But you might notice other communication touchpoints right before that purchase moment, like your website confirming to customers that an item has been added to their shopping cart, then suggesting related products.



Looking for all these touchpoints can quickly bog your team down in a lot of details and micro-interactions. To avoid that, prioritize the moments that get you closer to achieving your business goals.

3. Recognize pain points and moments of delight

How might your customers feel at the pre-purchase, purchase, and post-purchase stages as they attempt to achieve their goals? For example, could your customers be happy that your website makes browsing easy, but frustrated at how confusing it is to purchase a product?

Find the moments where your customers might have negative experiences. Who on your team is involved in those touchpoints? Your web designers? Your marketing team? Your copywriters? Are there other team members who could collaborate and improve the situation?

Say a customer likes how your online ad describes your product. But when they go to your store, salespeople present the product differently. That's an opportunity for your copywriters and salespeople to better align their language and sales pitches.



4. Experience the customer journey yourself



Imagining how your customers might feel during their journey is valuable, but actually experiencing it for yourself can uncover much-needed insights.

If your business is run online, open a browser and experience what it's like to be your customer. Similarly, if you have a brick-and-mortar store, go into a location that sells your product. Afterwards, ask yourself about the main communication touchpoints you encountered. Did they work well? Did they help you complete your journey? What was missing?

And don't forget about the competition. Become one of their customers and experience the journey they've created. Then ask yourself all of the same questions.

5. Visualize your customer journey map

Go beyond just writing down your customer journey and communication touchpoints, and actually create a visual map of them. This doesn't need to be a polished, heavily-designed visualization. Simply write each of your touchpoints down on individual sticky notes or papers, then pin them in order to a wall.

By doing this exercise, you're helping your team take a bird's eye view of the entire customer journey. You can organize your thoughts and collaboratively brainstorm new ideas for changing or adding to your communication at these touchpoints.

Make sure to create hypotheses around why new communication touchpoints will improve the customer journey, then implement and test them. If your hypotheses are wrong, go back to your journey map, reassess, tweak, and improve.



Yes, the journey mapping process can be fairly intensive, but it can have a big impact on your business. That's why it shouldn't be just a one-time event. Customer tastes can shift, new technology can become available, and your brand itself might evolve. So it's important to do journey mapping at least once a year and evaluate what communication touchpoints are still working and what needs to be revisited.

Customer Journey Map Template

<http://bit.ly/2YlaPLe>

Stage	Discovery	Consideration	Purchase
Touchpoints			
User Experience			
Actions			
Motivations			
Questions			
Pain Points			
Satisfaction Levels			
Customer Experience			

How Your Brand Can Win



The reality is the customer journey is nothing short of dynamic. As the journey continues to shift and change shape, it's becoming harder for marketers to make sense of all the consumer intent signals people leave behind. Today's consumers expect more. They want assistance at every step. Therefore, as marketers, we need to be one step ahead of our customers – it's time to start predicting their needs regardless of where they are in their journey.

- Travelers want to feel confident. Make sure that you are taking every opportunity to let them feel the experience of your brand and be able to predict the answers to any questions they may have.
- Travelers want immediate gratification. This highlights the importance of differentiating one's brand at every opportunity, whether it's being there when someone searches for "top things to do near (your location)," having a fast mobile site that gives them the information they need on the fly, or proactively suggesting things to do in-destination once they're on their way.



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THANK YOU!



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