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Structured Abstract

Purpose

The shopper journey can cross a number of channels leading up to the point of a possible purchase, which may be unseen by the retailer or brand for the targeted purchase. The purpose of this paper is to gain a greater understanding of the decision making and purchase intention activity for online Millennial shoppers in deciding what fashion garments to buy in the digital retail environment. The paper also investigates the use of technology and social media involvement in the shopper journey leading up to the point of purchase.

Design/methodology/approach

In line with other studies that investigated online shopper behaviour (Balabanis and Reynolds, 2001; Pavlou et al, 2007) we have undertaken an exploratory investigation using an online survey conducted with respondents sourced through using Survey Monkey Audience. The survey was conducted with over 580 respondents (49.7% female and 50.3% male) between 16 and 34 years old living in England.

Findings

The findings highlight a picture of shoppers going on very different shopper journeys with different lengths, influenced by different touch points and using different media and devices. Each customer has their own individual experience and expectation. They can move through extremely diverse, long and complicated journeys in the buying process before they purchase a product. Most striking is their willingness to reach out and be influenced by other people beyond the control of any retailer – using platforms that are not necessarily specifically related with any retailer. Shoppers can undertake numerous activities before they make their final purchase decision, seeking content from different retailers, asking for social validation of their decision from their social networks both online and offline which is often out of sight of the retailer or brand.

Practical implications

The findings show how retailers and brands can understand the shopper decision journey and their behaviours across all the devices and channels that are used. Moreover, for some or part of the digital journey the shopper can often be unseen by the retailer or brand.

Originality/value

Consumers actively seek out novelty, knowledge and inspiration but shoppers employ a variety of interactions over a much greater period of time to arrive at the moment of purchase. This research provides an insight into the range of complex views and positions held by each individual to get a much more complete picture of where shoppers are looking to buy and what are their interests.

Keywords: Internet retailing; Purchase intention; Fashion; Marketing Communications. Decision making

1. Introduction

Since the 1950s the volume and nature of communications have changed significantly (Kitchen, 1999). Marketing spend has continued to increase on digital media (such as web, e-mail and mobile) at the expense of more traditional media (such as TV, radio, cinema, outdoor and direct mail) (see Warc, 2015). Contemporary communications have moved from asynchronous interaction (participants do not respond immediately e.g. email), to synchronous interaction (real time communications with instant responses) (Tuten and Solomon, 2013). The introduction of mobile platforms has transformed retailers with opportunities to develop a variety of technological innovations aimed at improving their approach to communicating with their customers (Taylor, 2016). Wilkie (2005) suggests consumers are faced with so much conflicting advice regarding alternatives to select that they have to ignore or resist most of this. Consumers are therefore engaging with brands differently (for example, Mix and Katzberg (2015) discuss the complex nature of consumer touch points with brands from instore, online, traditional advertising etc.) and marketing may need to adapt and be more flexible (Parsons and Maclaran, 2009). Furthermore, consumers are likely to have access to greater amounts of information in this digital era and therefore, consumers with greater knowledge will feel more powerful (Faucault 1972). If consumers know how to evaluate various value propositions on offer, then this will lead to a higher degree of consumer empowerment, which may depend upon how 'connected' they are (Pires et al. 2006).

A gap in the literature concerns the duration of time leading to the zero moment of truth at purchase (Court, 2009) and the use of social media. Previous research has addressed high/low involvement decisions and those under time pressure (Johnston et al, 1997) but there lacks a focus on time involved in the decision journey and how this influences shopping behaviour. Retailers have developed an online presence as trading through this channel has become as important as that through the conventional store. The Internet's emergence provides a compelling platform for undertaking digital business to consumer transactions (Sahi et al, 2016).

The second gap in the literature concerns the influence of others who validate purchase decisions with younger online shoppers using social media. The use of devices is known to be part of the shopping activity (Taylor, 2016) but there is limited knowledge of how social media is used to incorporate reliable and trusted opinion of others into the decision making process.

To address these two gaps outlined above this research will present the findings of an exploratory investigation of Millennials and their purchase intentions leading to the zero moment of truth. Specifically it focuses on how this younger age group incorporates social media into the shopping journey from ideas and inspiration to the final choice of the purchase. The paper starts with a literature review on the digital age, followed by consumer decision making and purchase intention, and then discusses shopper behaviour. It continues with an explanation of the adopted methodology using an online survey of more than 500 respondents to address the research aim and concludes with a discussion of the developed themes, and suggestions for future research.

Literature Review

The Digital Age

The digital age is the era where a person can exert significant influence on not only their identity but also their behaviour as consumers (Solomon, 2009). Prensky (2001) used the term of "digital natives" to define those groups that were born and grew up in the digital age, and "digital immigrants" to define those that had to adjust to survive in a digital age. A great deal of debate has taken place regarding these terms, and generally it is seen as a far too simplistic classification. Generational cohort theory (GCT), proposed by Mannheim in 1928 has also been used to understand consumer behaviour and explain the use of technology (Smelser, 2001). This classification is based on shared experiences/events relating to life stage, rather than the more conventional groupings such as social class or geographic (Sessa et al., 2007). Gen Y (suggested born after 1981) and Gen Z (suggested born after 1991) are highly digitally literate that are grouped together and known as the Millennial Generation (born 1982- 2004). Gen Z are more individualistic, more tech-savvy, always connected, are brand aware and more communicative than Gen Y (Moore 2012).

Sinton and Puri (2014) moved the classification discussion to social media, which is defined as "the creation and exchange of user generated content" (Kaplan and Haenlein, 2010, p61). Sinton and Puri (2014) argued that more traditional ways of identifying discrete segments to target do not work adequately for social media as they are unable to identify who will respond to social media content against someone who will not, and suggest that marketing campaigns often feel bland and generic. They identified four personas of the connected world based upon higher or lower association with two separate categories: (1) digital influence and how connected consumers are throughout the day and (2) social engagement and how much consumers embrace social media. This classification is useful for marketers as it highlights how relevant traditional media channels are to each of these four groups. It highlights, for example how social media and traditional media are used simultaneously, such as watching TV can lead to substantial increases in real-time traffic on social media sites e.g. Twitter, as viewers tweet about live events (Zubiaga et al., 2015). Moreover, the more that consumers connect to multiple devices it may reduce their level of consumption of more traditional media (Kemp, 2015). It is therefore important that an organisation understands the most appropriate mix of communication tools to reach their target audience and highlights that not all consumers are interested in being active on social media channels even if they are digitally active across multiple online devices. And social engagement does not necessarily have a role in their purchase journey. This creates an interesting area of research for investigation to understand how shoppers buy through digital retail outlets and understanding their purchase intentions and influences that lead to their choice of the final product. The focus on Millennial shoppers is interesting as they are known to have a high propensity to use multiple online devices as digital natives connected in the retail environment (Kirk et al, 2015).

In order that organisations can effectively reach their target audience during the decision making process, they need to understand the level of expectation that consumers have regarding communications by brands with them (Tuten and Solomon, 2013). It is suggested that consumers expect more real time communications, instant responses, more open, instant and less formal interactions between brand owners and consumers. In 2014 globally there are 3.01 billion active internet users (42% of the World population), with a total of 2,078 billion active social media accounts with 2.2 hours daily spent on average on social media, strongly supporting the importance of communicating online and through social media (Kemp, 2015). Moreover, there are 3.649 billion unique mobile phone users worldwide, and 31% of web traffic is from a mobile phone, compared to 62% through a laptop or desktop, and 7% through a tablet. Access to the internet through a mobile phone has grown by 39% from the previous year, which enables information to be accessed during any stage of a shopper's journey. This reflects on the growth of digitally connected shoppers and the increasing importance of online shopping. Within Millennials social media has gained particular relevance for socialising, and experiencing a sense of community (Lenhart and Madden, 2007) whilst using it as a source of information, leisure and entertainment (Valkenburg et al, 2006). There has been a step change in the use of mobile devices in parallel with the step growth of online shopping, and the types and intensity of social media use (Bolton et al, 2013).

From an early stage it was predicted that the Internet would significantly alter consumer behaviour as a new channel-to-market (Doherty and Ellis-Chadwick, 2010). 'Shoppers' (individuals engaged in shopper mode) are likely to be behaviourally distinct from individuals engaged in one or more stages of the classic consumption process. However for shoppers there are challenges associated with online shopping, particularly where the range and use of channel present new opportunities (Dolataabadi and Ebrahimi, 2010). If a shopper has a belief in an online vendor's credibility, reliability and trustworthiness then they are more likely to actually make a purchase using the internet (Folake, 2014). When making an online purchase trusting beliefs have a significant role for the online vendor (Pan and Chiou, 2011). Changes that a retailer makes to their brand or product assortment diminishes the certainty a shopper has for successful completion of the shopping task associated with the retailer for the brand, product, and/or location/ channel (Jones and Runyan, 2016). Therefore, brands and retailers will find more success focusing on how they can satisfy occasion-specific purchase needs based on specific shopper segments (e.g., high or low important occasion or recipient).

This leads us to the aim of this paper which is to gain a greater understanding of the purchase intention activity and the shopper journey for Millennial shoppers in a digital retail environment. An understanding of how purchase intention is moderated with the use of digital devices and the internet, and associated changes in the retail environment has created an interesting area of marketing research that underpins the rationale for this paper.

Consumer Decision Making and Purchase Intention frameworks

The rapid and continued growth in shopper marketing requires precise communication strategies to drive performance. Individuals actively engaged in making a purchase begin down a 'path-to-purchase,' a decision making process to solve an occasion-specific purchase need (Shankar et al., 2011). As a result, a shopper's final purchase decision is often markedly different from decisions made whilst engaged in other stages of the traditional consumption process (Bell et al., 2010). With the use of smartphones and other devices more useable data is freely available and accessible to enable consumers to gain knowledge and inform purchase intention processes (Gehrt et al, 2012; Taylor, 2016). Moreover, Euromonitor International (2011) suggested that there is some evidence that younger consumers are able to process large amounts of information including emotional and trend forecast aspects that could impact on their decision making (Zinkhan, 1992; Betteman, 1998; Bray, 2013). To study the complex human mind, consumer decision making models have focused on behaviour that result from various stimuli (Egan, 2015; Watzlawick et al., 1967). Predominantly the emphasis is on consumer rationality and does not adequately provide details of the internal consumers decision process, and most importantly they lack an explanation as to why a range of responses are seen from the same/similar stimuli (Watzlawick et al., 1967; Kotler et al., 2004). Equally other viewpoints within psychology tend to focus on choice, rather than consumer decision making (Bornholt et al, 2004).

Conflict, uncertainty, cognitive activity and psychological processes are observable and part of choice (Hansen, 1976) and as such viewpoints around consumer decision making theory vary. The behavioural perspective refers to black box type models, such as within marketing communications by Schramm (1955), Shannon (1949) and Weaver (1949). The cognitive paradigm has a focus on thought processes and decision making stages of activities (Egan, 2015) and tends to represent decision making from a rational perspective Solomon, 2009). Although some variation occurs, stages are generally accepted to be problem recognition, information search, evaluation of alternatives, product choice and post purchase evaluation (Blackwell et al., 2006; Olshavsky and Granbois, 1979; Darley et al., 2010). These models fundamentally appear to demonstrate elements of rational behaviour through a logical and linear set of steps and there continues to be a discussion regarding how relevant and appropriate this is in today's communications environment (for example see Mix and Katzbberg (2015). Often decisions have at least some emotional element to them, and there are issues around the linear steps, for example most starting with a rational recognition of a need, followed by the linear set of steps. The consumer decision process has also been viewed as a purchase funnel, proposed by Lewis in 1903, and changed/adapted by a number of people. For example, De Bryun and Lilien 2008) discuss awareness, interest and final decision; Vazquez et al. (2014) discuss awareness, evaluation, purchase and post-purchase experience, and Hudson and Hudson (2013) propose initial consideration set, consider, evaluate, purchase stages. The purchase funnel is a useful illustration within the development of models, and suggests a slightly less-linear approach, but still suggests it is logical. It assumes that consumers have an initial wide choice set which is then narrowed down. This may have been appropriate during its early conception in an era of modest availability of traditional marketing, with limited brand choice and limited availability of information. However, there are a number of researchers (for example Lye et al., (2005); Court et al., (2009); Hauser and Wernerfelt (1989; 1990) Roberts and Lattin

(1991) who suggest that modern day communications and the vast array of available information have changed the initial choice set. Consumers may not narrow down, but later increase their choice set from a very narrow initial choice set, or may make multiple decisions at the same time. Lye et al., (2005) suggest that consumer decision making should be seen as decision waves, where multiple decisions are taken within a single decision process seen as a sequence of activities, rather than stages, allowing for multiple decisions within each single decision process. Hudson and Hudson (2013) suggest consider, evaluate, buy, and enjoy, advocate, bond as the key stages. They suggest that social media is extremely important at the "evaluate" and "advocate" stages of the decision journey. They also suggest in an online environment that marketers have to compete for shoppers' attention, and highlight that after purchase consumers share their experience with the brand online through social media.

However, Mix and Katzberg (2015) explored contemporary shopping behaviour and observed disorientation, and confusion and feeling over-challenged due to overwhelming opportunities relating to shopping. They suggest that the reality of how decisions are actually made is far from the linear consumer decision making process, but also that the more contemporary views regarding the consumer decision journey are not necessarily accurate either. Individual consumers can have vastly different approaches to their decision making, even within the same product type/sector, and the approach for some is seen as a "back and forth" approach, often involving online and offline, without any sort of plan regarding their approach, illustrating a high degree of emotion rather than rationality. Information, inspiration and experience are identified within a circular model, with the key being a trigger that can happen at any point. Brands should therefore not focus on getting shoppers to move to the action stage, but on helping with emotional connections to the brand such as showing the brand in a particular context, even if that context is not reality. Examples of brands that have made good emotional connections with consumers include: Lynx that generated £750,000 of additional revenue through their Facebook activity with 16-24 year old males (May, 2012); Red Bull with over 44m likes on Facebook (Radcliff, 2014); GoPRo with 11.2m views in 10 days for innovative content (Radcliff, 2014); and the iHobo app that was developed by homeless charity Depaul (Media Week, 2010). This has led to understanding that a number of common influences have developed in consumer behaviour through their different shopping journeys.

Shopping Behaviour

The shopper and their decision making process or decision journey allow marketers to think strategically about what they should be doing at different stages of the consumer decision journey. The implication is that these internet users are active in their shopping behaviour, display brand loyal behaviours and are prepared to engage in comparison-shopping to find the best value. They may balance the wish to shop around with the practical consideration of making a convenient purchase, or seek to obtain the best possible deal. What is clear is that it may be rather difficult to specifically target these consumer discerning shopper segments, since their shopping behaviours are not easily compartmentalized (Jayawardhena et al, 2007). In a recent Econsultancy (2015) report on optimizing customer experience there is strong agreement that firms want fully personalised shopper experiences but few have a single view of the customer, real omni-channel capabilities and the complete data-view of their customers that are required to do this.

Wolny and Charoensuksai (2014) segmented customer journeys for cosmetic shopping, based upon differences in patterns and behaviour relating to time searching for information and use of reference groups. Decision makers often skip steps or do not follow all stages in a sequential manner (Papamichail and Robertson, 2008) and process instances often include divergences from the norm and iterations between stages (Langley, 1999). Online purchase decision making is a dynamic and highly flexible process with individuals making choices that lead to different journeys (Karimi et al, 2015). The variety of different shopping channels available to the online shopper has extended the potential duration and magnitude of the retail journey. "Shoppers" are said to behave differently from the traditional "consumer" (Jones and Runyan 2016, p777) as they are actively involved in shopper mode, with a view to making a purchase. Various path-to-purchase (PtP) frameworks have been developed by shopper marketing firms, and others involved in the purchase decision making. Dennis et al. (2010) discussed the influence of friends on purchase intention, for instance but more generally Needel (2015) suggested that further research was needed.

A coordinated multichannel offering that provides a seamless experience when using all of the retailer's shopping channels is defined as omni-retailing (Levy et al., 2013). The dominant approach is integrating channels by providing a mobile application, which adds another user interface/shopping environment, exploiting the smartphones' indoor location tracking (e.g. Macy's Shopkick app), augmented reality (e.g. American Apparels's Vuforia app) and social networking integration (e.g. Guess loyalty app). Established retailers have developed their own web presence but have integrated this with physical outlets to create multiple channels to market (Burnes and Towers, 2015). In its integrated form the omni-channel approach to retailing integrates channels such as point of sales networks, paper catalogues, internet website, social network, virtual point of sales, mobile applications, etc. (Thoughtworks, 2011). A recent whitepaper by the Korn Ferry Institute defines omni-channel retailing as an advanced and integrated cross-channel customer experience (Elliott et al, 2012). The omni-channel approach makes it possible for a customer to identify a product online, go into a shop to take a closer look, decide whether they want it or not, order it online whilst in the shop or later and either have it delivered to their home or pick it up from the shop, whichever is more convenient (Mahar et al, 2014). These types of approaches have been described as showrooming (defines consumers that view the product in-store, but then purchase it online) and Webrooming (where the consumer researches online, but then purchases in-store) (Wolny and Charoensuksai 2014).

Considering existing literature and the changing nature of contemporary communications there are some specific areas that need further consideration as a result of these changes. Whilst there has been some debate regarding the nature of consumer decision making models and consumer journeys, research is still developing regarding social media use for shoppers at the information search stage and how social media use impacts on the influence of 'others'.

2.1 Information seeking behaviour and information search.

The majority of models assume that shoppers search for information but as there is now such a wealth of information available they may start with an initial narrow choice set (as suggested by a number of researchers, for example see Hauseer and Wernerfelt (1989; 1990), which may be expanded later in the shopper journey. Other ways of dealing with increasing volumes of information include consumers using specialist online sites to assist in searching and processing large amounts of data (for example Moneysupermarket.com for insurance searches, and Booking.com for accommodation searches). Furthermore, there is evidence that suggests different search patterns exist for shoppers (for example Usher et al. (2010) for Higher Education, Furse et al. (1984) for new car buyers and Wolny and Charoensuksai (2014) for cosmetics). There needs to be an understanding of how this can impact upon their consumer decision journey. Moreover, risk and uncertainty in decision making plays a key role in their search for information. Perceived risk is increased where there is the potential for a negative outcome from buying a product or service, or where the buyer is inexperienced in a particular product category (Shek et al., 2003). This may lead to a greater degree of information search. Word of mouth has also been found to play a key role in helping to reduce risk (Sweeney et al., 2008). Furthermore, although there is previous research linking product knowledge and searching for information to an increase in purchase intention (Dennis et al. 2010), there appears to be little known about how people retain and use it in the shopper journey.

2.2 Technology, social media and shopper behaviour

Many models (e.g. Blackwell et al, 2006; Olshavsky and Granbois, 1979; Darley et al., 2010) assume a level of rationality and many show the decision process as linear. However, even where shoppers do have some level of rationality, because of the complex nature of the world we now live in, and the vast amount of decisions required often on a daily basis, they can suddenly switch and become highly irrational (Mix and Katzberg, 2015). This can culminate in unpredictable purchase moments, where shoppers require an emotional fix that may even contradict their own personal standards. A single trigger, which could be an online banner advertisement, a piece of direct mail, or some other form of communication could completely change the nature of the decision. The single trigger could act as a pressure relief, as the shopper has now made a decision, even if this has been a sudden, irrational one. Furthermore, Jones et al. (2015) suggested that all shoppers are 'convenience' shoppers, with competing time demands, seeking to maximize shopping time and that all shoppers have a time constraint. Jones and Runyan (2016, p782) discuss multiple temporal dimensions as part of their PtP model as: "time to complete or terminate a current event, time between current and subsequent events, proximity to next need occasion, time to gather missing information, and time required to purchase the product."

Shoppers generally process information differently depending upon their degree of involvement (Blackwell et al., 2006). Where there is a higher degree of complexity, more thought and involvement is said to occur with longer journey times, the majority of models focus on higher involvement decisions (Hoyer, 1984). For higher involvement products, consumers more generally need to feel more connected, search more extensively, and are more likely to share consumption experiences retrospectively (Zaichkowsky, 1985). However Millennial shoppers are more likely to find information and participate in interaction through digital media channels and are more likely to prefer social media for these interactions (Bolton et al., 2013). Organisations need to know which innovations are most relevant to them and how to gain advantage from using various digital marketing techniques (Doherty and Ellis-Chadwick, 2010). Not all high involvement decisions involve a higher degree of thought and involvement as decisions taken under time pressure lead to hypervigilant decision making where a selective search takes place and without an extensive consideration or appraisal of alternatives (Johnston et al., 1997). Furthermore, shoppers can have unpredictable irrational behaviour for any type of purchase.

2.3 Influence of Significant Others.

The influence of other people such as friends and family within the decision process is extremely well documented. However, within the digital era 'friends' may have a much wider definition with connections to many hundreds of 'friends' through social media sites such as Facebook. Furthermore, electronic word of mouth (eWOM), which may have taken place at a post purchase evaluation stage by others, may significantly impact upon how decisions are made. Online product ratings and online reviews have recently taken on a much larger role in the wider consumer decision process (Moe and Trusov, 2011) with their use during the buying process estimated to be anywhere between 42 to over 70 percent of consumers (Tuten and Solomon 2013). Consumers living in a complex world, faced with time pressures and increased amounts of decisions to make on a daily basis, make decisions based purely on the recommendation of others, without searching for information even for higher involvement decisions. Evidence suggests that not only are Generation Y and Z shoppers highly influenced by their peers but they are always connected (Euromonitor International, 2011) and therefore eWOM is likely to be increasingly important for this group of shoppers. However, there is conflicting research regarding the influence of friends, and although Dennis et al (2010a) found no significant influence of friends in on-line purchase behaviour, others have shown different degrees of involvement (for example see Dall'Olmo Riley et. al. (2009), Rohm and Swaminathan (2004), Parsons (2002), Dennis et al. (2010b), Wang 2011, Chan and Ngai 2011).

In summary we have argued that the decision making process and shopper behaviour literatures have not fully explored the purchase intention activities or purchasing journey for online Millennial shopper purchasing behaviour, particularly with respect to the use of technology and social media involvement. The shopper journey can cross a number of channels leading up to the point of a possible purchase, which may be unseen by the retailer or brand for the targeted purchase.

Methodology and Results

In order to address the research question an exploratory investigation was undertaken to gain a greater understanding of the common influences developed in shopping behaviour through different journeys. In line with other studies that investigated online shopper behaviour (Balabanis and Reynolds, 2001; Pavlou et al, 2007) we have examined online decision making in the fashion garment sector. An online survey was conducted with respondents sourced though using Survey Monkey Audience. The survey was conducted over 5 days between 21st and 25th March 2015. Respondents were required to be between 16 and 34 years old (Gen Y and Gen Z criteria), be living in England having purchased an item of clothing costing £15 or more during the 60 days prior to answering the survey. The questionnaire referred to their most recent fashion purchase. Research ethics guidelines state that young persons aged 16-18, do not require parental consent (Manchester Metropolitan University 2017). In total 1,978 people started the survey, 53% female and 47% male, some were filtered out during the process for not meeting these specific criteria but only 589 of that group provided opinions prior to completing their purchase (49.7% female and 50.3% male). Three key areas are presented in the results: behaviour relating to searching for information, the influence of 'others' throughout the process, and the use of technology, along with a discussion regarding the implications and future direction.

3.1 Information seeking and search methods

The shoppers in the survey looked for ideas and inspiration from many different sources including printed media, TV, high street shops and websites, social media and from family and other people (Figure 1).

Take in Figure 1

Shoppers use a mixture of different channels and technologies in a variety of journey experiences. They bought items online using a variety of devices and their shopping journeys had different lengths from less than an hour to over a month (Figure 2). Shopping journeys of less than an hour were less frequent for higher estimated price ranges and journey of three to five days were more frequent as estimated price range increased.

Take in Figure 2

Shoppers used a lot of different digital methods to discuss their buying options, not just speaking on the phone and face-to-face conversations (Figure 3). And their final purchase decision was influenced mostly by friends and family as well as price. Price is known to be an important part of a general trend for UK shoppers' decision-making as we have moved into a discount driven, price sensitive retailing era across a wide range of price points, driven in part by discounters making significant in-roads into food multiple retailing. For clothing however there is a technical and trend component in the product which is evidenced by respondents being influenced by shop assistants, other methods that the retailer controls and influences outside of retailer control, such as PR reviews and online communities.

Take in Figure 3

The survey respondents used a variety of online and offline sources to get ideas for what products to buy. When we asked our shoppers where they looked for ideas and inspiration, 41% said 'From a variety of high street shops', 39% said 'From a variety of shopping websites' and 25% said from social media. 32% got ideas from partners, friends and family, 21% used printed sources and 18% used the TV but only 15% said search engines. This suggests that ideas are predominantly drawn from product placement in the retailer's digital and store domains, and from social media sources.

Take in Table 1

However, what was most striking was not the variety of channels and sources that our shoppers used – it was how difficult shopping was for them. Taking ideas from different on-line and offline sources and using different shopping websites seemed to force them into using many different ways to remember their shopping ideas. 40% had to just remember the ideas, 18% bookmarked their browser, 16% used a search engine to find items again and 23% saved images or other information to their phone. 10% even emailed themselves to remember a good idea.

3.2 Technology, social media and shopper behaviour

There was widespread use of digital technology to remember product details and to discuss products with their contacts. This did not vary between the two age ranges in our survey or between genders. We found that longer shopping journeys tended to make use of more technology to remember details and discuss them. Not unexpectedly respondents ranked memory lower for longer journeys and technological aides higher. Both age ranges predominantly discussed their buying options with their contacts face-to-face but there was a widespread use of WhatsApp, speaking on the phone, Facebook, Facebook Messenger, Email, Instagram, Snapchat, Twitter and text messaging (Figure 4).

Take in Figure 4

Both genders in the survey also used a similar mixture of technologies to remember details (Figure 5).

Take in Figure 5

As shoppers journeys increased from 'less than an hour' to seven days there was also a gradual rise in their use of technologies to remember product details. But this smooth rise was not echoed in those that committed the details to memory – although large numbers of shoppers resorted to using memory (Figure 6).

Take in Figure 6

As the journey length increased our respondents ranked their memory lower, as a method of remembering products details, and they ranked technological methods higher (Figure 6). As one would expect, remembering would be less popular for longer journeys – the number of people that ranked memory first went from 34 to 5 as the shopping journey went from less than 1 hour to more than a month. The number of people that gave a top ranking for saving pictures, bookmarking sites also increased for journeys of less than 1 hour to between 1 and 3 days. E.g. for this range of journeys between 13 and 27 respondents gave 'saving pictures' a top ranking. And between 6 and 26 people gave 'bookmarking sites' a top ranking.

3.3 Influence of Significant Others

When the shoppers were making their final choice of which item to buy and seek endorsement 48% asked their partner or spouse, 37% asked a friend and 35% asked a family member. But 10% of these shoppers asked a shop assistant for opinions, 6% asked a work colleague and 3% asked people in online communities or forums.

Take in Table 2

This indicates that a reliable and trusted opinion was required in the final 'zero moment of truth' purchase instant.

Both genders predominantly discussed their buying options with their contacts face-to-face but there was a wide spread use of WhatsApp, speaking on the phone, Facebook, Facebook Messenger, and to a lesser extent Email, Instagram, Snapchat, Twitter and text messaging (Figure 7).

Take in Figure 7

We also asked about the length of the shopper's journey is linked to the impact of opinion source and how they ranked their methods of remembering product details. An overwhelming majority of respondents felt that feedback validated their opinion (between 67% and 80%). And only around 10% felt that the feedback changed their minds. This did not change significantly with the length of the shoppers' journeys (**Error! Reference source not found.** 8).

Take in Figure 8

We looked at how shopper journey length is linked to who people ask opinion from and the impact of different opinion sources. Our respondents mostly asked partners, friends and family, but also colleagues, shop assistants and online communities – and these all showed some increase as the journey length increased (Figure 9).

Take in Figure 9

In terms of how people are influenced, as estimated item prices increases the influence of strangers that are seen as 'experts' becomes stronger than that of friend and family. Different shopper journey lengths are linked to a waxing and waning of the strength of influence from different sources. Interestingly, some sources increased in strength and then decreased, for longer journeys, and some did the opposite. For higher estimated price ranges the opinions from experts was ranked slightly higher than that of friends and family. Opinions were ranked as important as price for differ lengths of journey.

4. Discussion

4.1 Shopper journeys

The findings highlight a picture of shoppers going on very different shopper journeys with different lengths, influenced by different touch points and using different media and devices. Each customer has their own individual experience and expectation. They can move through extremely diverse, long and complicated journeys in the buying process before they purchase a product. Most striking is their willingness to reach out and be influenced by other people beyond the control of any retailer – using platforms that are not necessarily specifically related with any retailer. Shoppers can undertake numerous activities before they make their final purchase decision, seeking content from different retailers, asking for social validation of their decision from their social networks both online and offline which is often out of sight of the retailer or brand.

For longer shopping journeys shoppers used more technological tools to ask opinions from their contacts. As shopping journeys went from less than 1 hour to between 3 and 7 days our shoppers use of WhatsApp increased from 6% to 27%; their use of Facebook increased from 12% to 25%; their use of Facebook Messenger increased from 4% to 29%. For the same journey lengths our shoppers' use of other digital tools also increased, whilst on a smaller scale, e.g. their use of Instagram increased from 3% to 7%; and their use of Snapchat, Twitter and Text messaging also increased as their shopping journeys increased in length. As shoppers journeys increased from 'less than an hour' to 'seven days' there was also a gradual rise in their use of technologies to remember product details. But this smooth rise was not echoed in those that committed the details to memory – although large numbers of shoppers resorted to using memory. The shoppers that use their memory to remember product details varied for different journey lengths and memory was the commonest method used. But shoppers also increased their use of technologies to remember product details as the length of their shopping journey increased, e.g. people that bookmarked websites on their browser increased as the shopping journeys went from less than 1 hour to between 3 and 7 days. The percentage of people that saved pictures on their phones or sent themselves emails showed a similar rise for shorter shopping journeys.

4.2 How do shoppers decide what to buy in our multi-channel world?

The results of the survey demonstrate that for the most part each shopper's journey is unknown. Shoppers have the potential for very diverse, long and complicated journeys before they purchase a product. Each shopper can use many different channels-to-market to search for products. We know that consumers prefer to interact with fashion brands when considering a purchase. They ask a diverse range of friends, family, work colleagues and broader contacts for advice, guidance and opinions to help make their choice. And they use different mobile devices, applications and a mixture of different online and off-line retailers in search of their desired purchase. This provides for a diverse and detailed set of challenges that a retailer needs to consider in order to capture the sale from an extremely well informed customer.

Few retailers appear to have the ability to really understand their shoppers' journeys as their intent to purchase slowly crystallises. However, few have a single view of the customer, real omni-channel capabilities, or a complete data-view of their customers in order to fully personalise shopper experiences (Econsultancy 2015). This is reinforced by the findings where we have found that shoppers go on very diverse, complex and individual journeys as they decide what to buy – often all or partially out of sight of the retailer.

4.3 How do shoppers use technology and social media to then manage their shopping options?

We found that there was widespread use of digital technology to remember product details and to discuss products with their contacts. This did not vary between the two age ranges in our survey or between genders. Also, we found that longer shopping journeys tended to make use of more technology to remember details and discuss them. Not unexpectedly, respondents ranked memory lower for longer journeys and technological aides higher. The survey respondents were in two age ranges, 16 to 24 and 25 to 34, and both age ranges used a similar mixture of technologies to remember details about the items that they researched before they bought, e.g. sending themselves emails; saving the details on their phone; adding website bookmarks to browsers; adding content to social media; and using a search engine to find them again. Around 40% of both age ranges also just memorised the details and both genders in the survey also used a similar mixture of technologies to remember details.

Both age ranges predominantly discussed their buying options with their contacts face-to-face but there was a wide spread use of WhatsApp, speaking on the phone, Facebook, Facebook Messenger, Email, Instagram, Snapchat, Twitter and text messaging. We asked shoppers about how the length of their shopping journey affected things like how they asked for opinions, who they ask and how they remember product details. Face-to-face communications was the most mentioned, but as their shopping journeys got longer shoppers used more technological tools to ask opinions from their contacts. Asking opinions face-to-face dipped from 70% to 50% as journeys increased from less than 1 hour and 3 to 7 days. But this rose back up again for longer journeys eventually reaching 65% for journeys of over one month. Our shoppers used different technological tools more at the journey length increased, but there was a decline in the use of all except Snapchat, Twitter and Text messages for very long journeys.

Shoppers asked for more opinions for items with higher estimated prices and for longer journeys lengths. And the impact of opinions from contacts was significant across different price ranges and shopper journey lengths. We also saw that the use of some digital channels increased as estimated price increased and that face-to-face opinion seeking hugely decreased, longer shopping journey lengths were linked to more use of digital channels. And shoppers ranked digital channels higher for higher estimated price ranges and for longer shopping journeys.

5. Implications and future direction

The research has shown that retailers need to understand the detail involved in the digitally connected shopper journey. Retailers need to invest in technology to facilitate the increasing use of social media in the validation process leading to the zero moment-of-truth in the purchase decision making activity. Millennials increasingly seek approval from their peer groups using social media to complement traditional forms of communication. Hence the retail environment is still an important space and should be recognised as a resource to facilitate this group of shoppers information needs. The journey length and opinion formers engaging with Millennials have been shown to be important part of the shopping journey from identifying ideas of what to buy, to retaining product details and finally through to purchase. The implication is that retailers need to address the growing cynicism of consumers towards marketing and communications, and shoppers being more selective regarding when they tune in to communications (Parsons and Maclaran, 2009; Wilkie, 2005). It is even more important that retailers know how to communicate with consumers.

Understanding shopper behaviour is essential if retailers and brands are to target Millennials effectively with appropriate communications. This suggests more research is required to understand the relationship of the contributory factors that underpins the reality of the online shopper buying behaviour (Szmigin and Foxall, 2000). This is supported by McCabe (2015) who suggests that brands should revise their focus on brand controlled messages to consider the authentic online content and interactions. Consumers actively seek out novelty, knowledge and inspiration but shoppers employ a variety of interactions over a much greater period of time to arrive at the zero moment of truth purchase. Future research should focus on gaining insight into the range of complex views held by each individual (Fisher, 2010) and the journeys through the different paths-to-purchase (Needel, 2015) to get a much more complete picture of information sources and timing, where inspiration originates in the shop journey and the nature of the influence of others. It will inform Millennials about the brand, their own unique shopper decision journey and understand their behaviours across all their devices and channels that they use.

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Figures and Tables

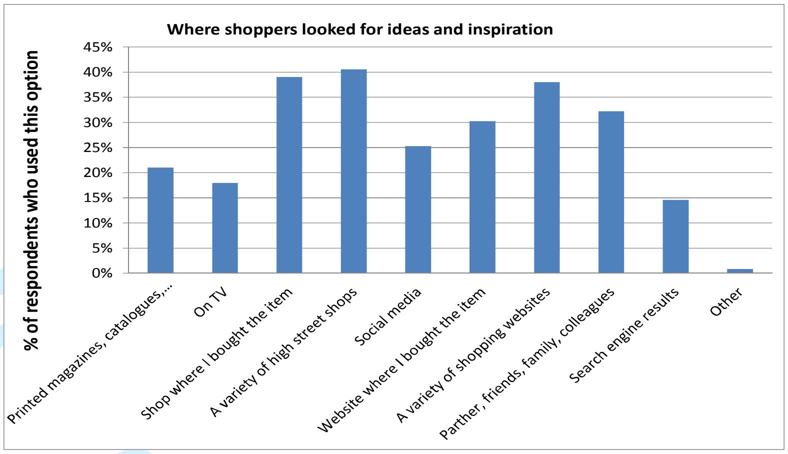

Figure 1: Where shoppers looked for ideas and inspiration (respondents: 589).

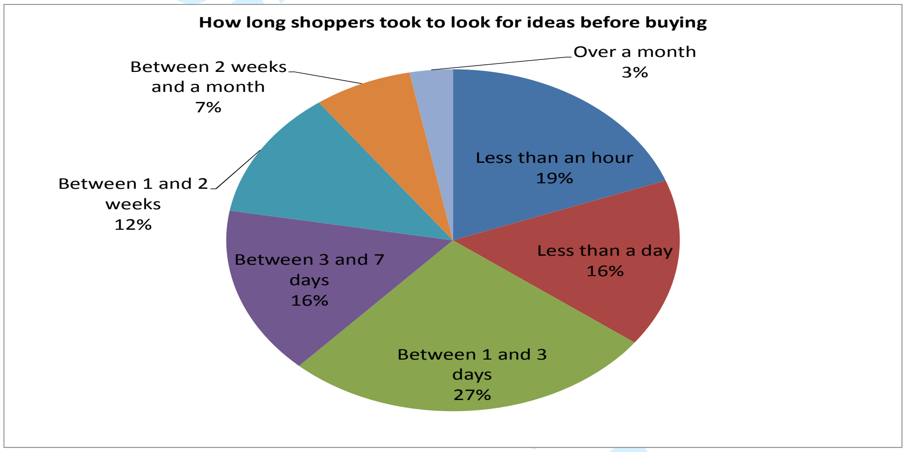

Figure 2: How long shoppers took to look for ideas before buying (respondents: 589).

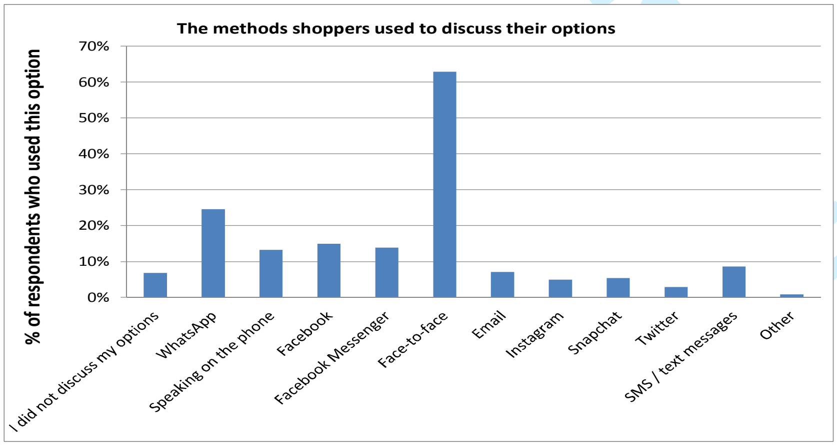

Figure 3: The methods shoppers used to discuss their options (respondents: 589).

Figures and Tables

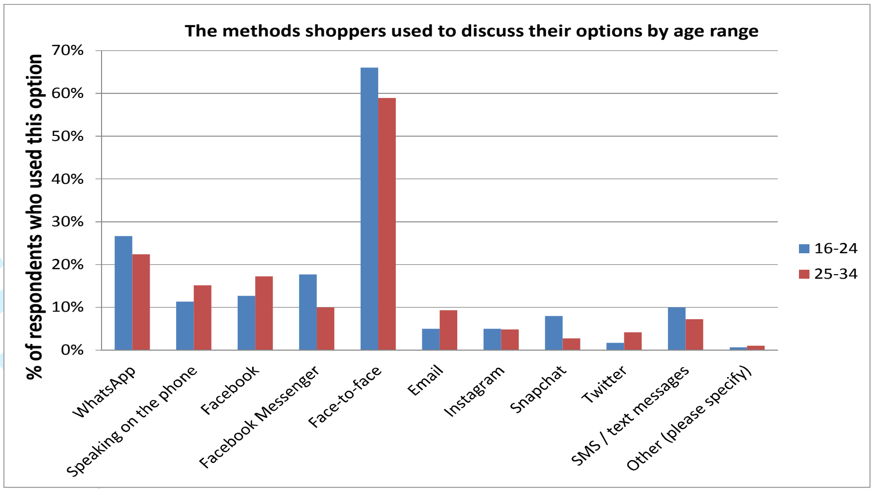

Figure 4: The methods shoppers used to discuss their options by age range (respondents: 589).

Figure 5: How shoppers remembered item details from different stores by gender (respondents: 589).

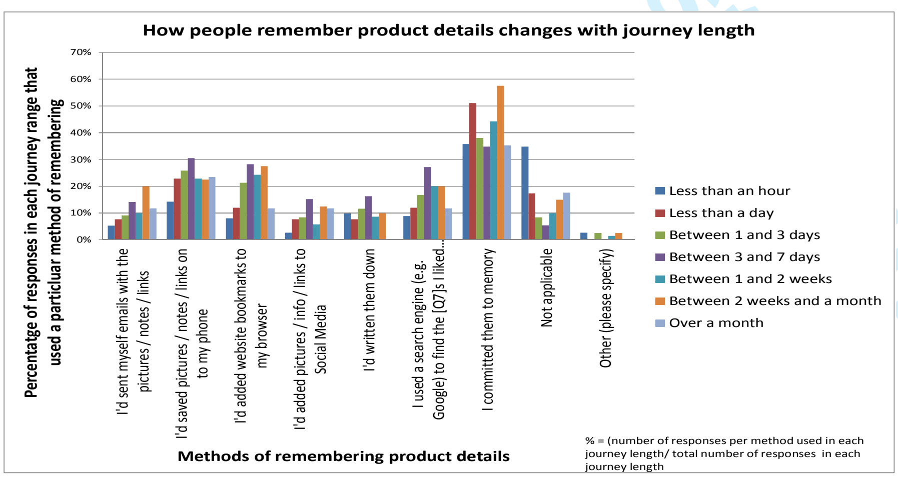

Figure 6: How people remember product details changes with journey length (respondents: 589).

Figures and Tables

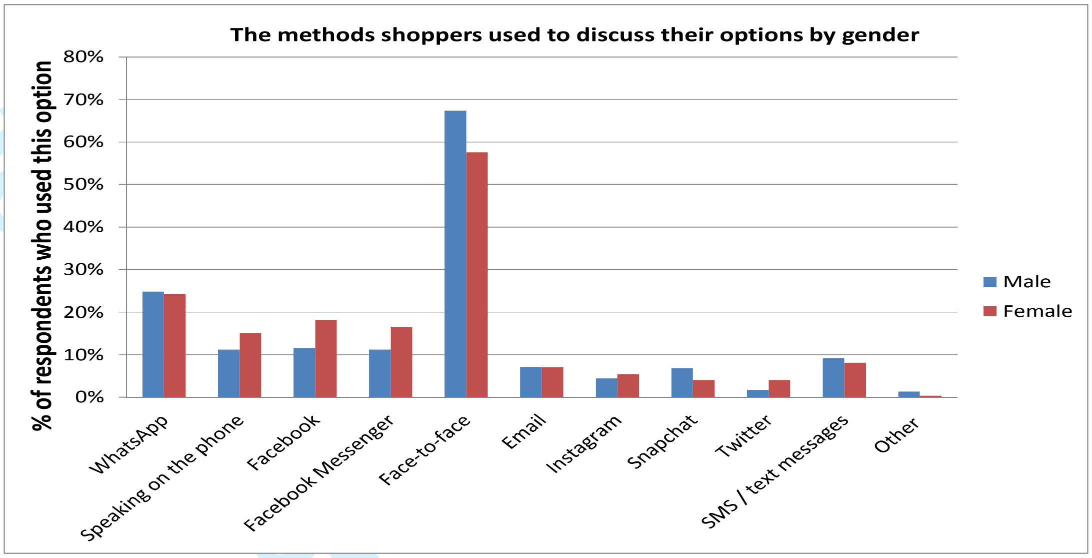

Figure 7: The methods shoppers used to discuss their options by gender (respondents: 589).

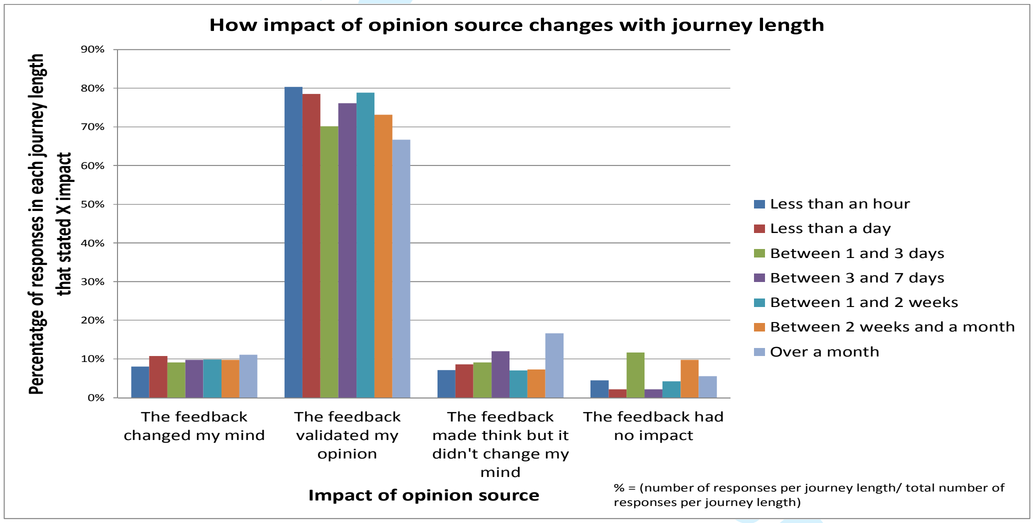

Figure 8: How impact of opinion source changes with journey length (respondents: 589).

Figures and Tables

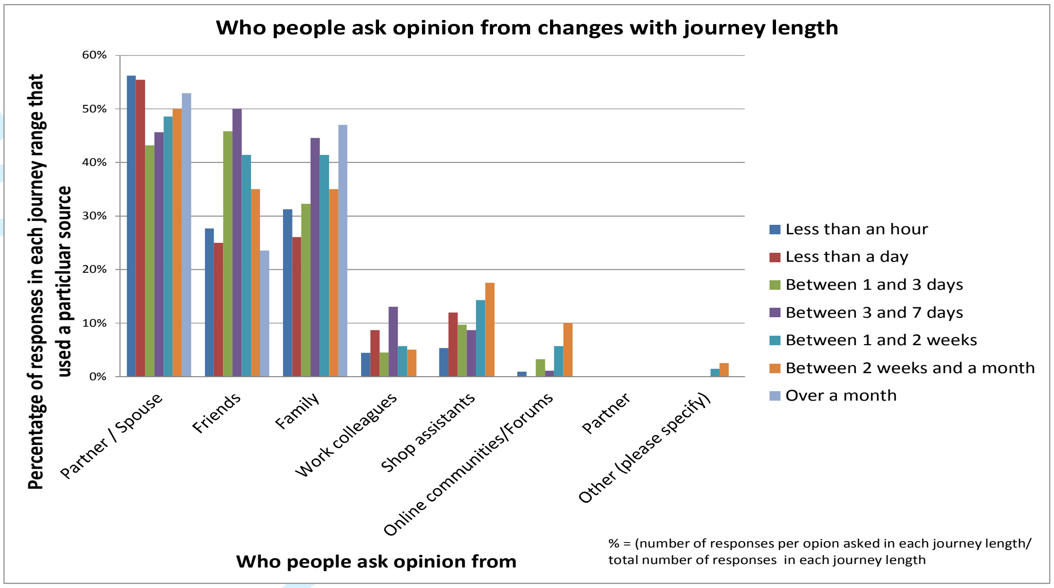

Figure 9: Who people ask opinion from changes with journey length (respondents: 589).

Figures and Tables

Sources of Ideas	
A variety of high street shops	41%
A variety of shopping websites'	39%
Social Media	25%
Partners, Friends and family	32%
Printed Sources	21%
TV	18%
Search Engines	15%

Table 1: Sources of ideas of what to buy

Final Choice referral	
Partner or Spouse	48%
Friend	37%
Family member	35%
Shop Assistant	10%
Work colleague	6%
Online Communities or forums	3%

Table 2: Final Choice referrals for validating purchase decision