THE CUSTOMER JOURNEY APPLIED TO CONTENT MARKETING STRATEGY

Case study – Electronic Retail: Large Appliances

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Abstract

The customer journey is the process that a customer goes through when researching and purchasing a product or service. For a content marketing strategy to be effective it is important to understand the specificities associated with each phase. The present study aims to provide managers, retailers and marketeers relevant insights on content marketing strategy and customer journey, by understanding the processes and preferences during three principal stages of a purchase: pre-purchase, purchase and post-purchase. I started by doing a literature review with concepts inside the scope of customer journey and content marketing. After, a case study was made, focusing on the retail of electronics and large appliances, analyzing this retail in Portugal and its biggest players. Also, to answer the research questions in this dissertation, it has been done a quantitative exploratory analysis of data gathered through an online questionnaire made to customers of large appliances. The data suggest a strong preference for online research but offline purchase. It was also possible to outline the content formats and channels preferred by customers at each stage of the customer journey, as well as clarifying the type of information desired.

Keywords: customer journey, content marketing, customer experience, marketing strategy, digital marketing, electronic retail, home large appliance, online, offline

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Sumário

O processo pelo qual um cliente passa ao pesquisar e comprar um produto ou serviço é denominado de "Jornada do Consumidor". Para que uma estratégia de marketing de conteúdo seja eficaz, é importante entender as especificidades associadas a cada fase deste processo. O presente estudo visa fornecer aos gestores, retalhistas e profissionais de marketing *insights* relevantes sobre marketing de conteúdo associado à jornada do consumidor, através da compreensão dos processos e preferências durante três principais etapas de uma compra: pré-compra, compra e pós-compra. Comecei por fazer uma revisão de literatura com conceitos dentro do âmbito da jornada do consumidor e do marketing de conteúdo. Depois foi feito um estudo de caso, centrado no retalho eletrónico e de grandes eletrodomésticos, analisando este retalho em Portugal e seus maiores retalhistas. Além disso, para responder às questões de investigação desta dissertação, foi feita uma análise exploratória quantitativa dos dados recolhidos através de um questionário online feito a consumidores de grandes eletrodomésticos. Os dados sugerem uma forte preferência por pesquisa *online,* mas compra *offline*. Foi ainda possível delinear os formatos e canais de informação preferidos pelos clientes em cada fase da jornada do consumidor, bem como clarificar o tipo de informação pretendida.

Palavras-chave: Jornada do consumidor, marketing de conteúdo, experiência do cliente, estratégia de marketing, marketing digital, retalho eletrónico, grandes eletrodomésticos, *online, offline*

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Chapter 1: Introduction

1.1. Contextualization

Nowadays, the overload of media and the constant flow of news create distractions consistently not allowing customers to take the essential information (Kaila, 2020). Thus, mapping the customer journey in a clear way is a useful approach not only for managers but also service designers (Segelström & Holmlid, 2009; Segelström, 2013). Due to the need to design the customer experience throughout their journey, considering their touchpoints and service offerings (Zomerdijk & Voss, 2010), comprehension of the customer journey arises as a crucial advantage in the service sector (Følstad & Kvale, 2018). Pharr (2018) points out that customer experience management is built by several marketing processes that are customer-driven such as decision process, customer satisfaction, customer relationship management and customer journey mapping. As Edelman and Singer (2015) state, winning brands owe their success to the superiority of the customer journeys they create and not only to the value and quality of what they sell.

This dissertation aims to provide managers, retailers and marketeers relevant insights on content marketing strategy and customer journey, by understanding the processes and preferences during three main stages of a purchase: before, during and after (Lemon & Verhoef, 2016).

It starts with a literature review with useful concepts such as digital marketing, social media, content marketing and customer journey. The remaining dissertation is based on the analysis of the electronic retail, large appliances category and its customer, being made an analysis of this retail along with its main retailers in Portugal, especially focusing on Worten, as it is considered the number one player in this industry. Next, a survey to customers of this retail was conducted, joining concepts addressed in the literature review, to study their customer journey and relationship with digital and content marketing.

1.2. Problem Statement & Research Questions

Drawing on the information mentioned above, retailers need to understand as in-depth as possible the customers' journey through their buying process: how customers search, how they make product comparisons, how they experience the stages of their journey, which attributes are most valuable to them and how they let brands enter in their mind and leave their decision sets. Retailers need also to know which actions need to be implemented to improve this journey, making the customer's experience coherent and customized (Edelman & Singer, 2015).

Following this, the problem under research is how to develop a content marketing strategy taking into consideration the customer journey on large appliances retail. To address this problem, three research questions and respective goals were developed:

RQ1: What are the roles of digital marketing and in-store offline marketing during the customer journey?

RQ1 Objectives: (i) understand the relationship between customer and digital marketing, (ii) understand the relationship between customer and in-store offline marketing.

RQ2: Is there an interaction between digital and in-store offline marketing?

RQ2 Objective: find out in which ways and which stages the two kinds of marketing are related.

RQ3: Analyzing content and its format for a content marketing strategy, what do clients value most at each stage of the customer journey?

RQ3 Objectives: (i) content, content format selection and preferred channel for each stage of the customer journey, (ii) draw guidelines for an optimal omnichannel strategy with the aim to use content marketing applied on the customer journey stages.

1.3. Outline

This paper follows an eight-chapter structure. The current chapter is about the introduction and contextualization of the research subject, which contains the problem statement, research questions and goals. The next chapter concerns the literature review with key findings for this study. The third chapter is a case study focused on electronics and large appliances retail, particularly in the large appliance category, having a more detailed analysis about Worten (the leading company in Portugal in the retail of household appliances and customer electronics). The fourth chapter accounts for the methodology (market research based on a questionnaire survey) and the results are analyzed and discussed. Later, conclusions are presented (chapter number five) and the limitations of this investigation and future research insights (chapter number six). The seventh chapter is about how this case study could be used in an academic context, presenting some teaching goals and a teaching plan. The last chapter has the references used for this dissertation.

Chapter 2: Literature Review

This chapter introduces the theme of this dissertation, examining its key constructs to inform, clarify and support the trajectory of the current investigation. Nowadays, customers are exposed to information anywhere at any time (Kaila, 2020), leading to oversaturation of advertisement. Hence, content creation is the main feature of inbound marketing that supports businesses to increase customer's engagement in a more efficient manner (Lehnert et al., 2021).

2.1. Digital Marketing and Social Media

In the recent past a shift was made in traditional marketing, due to the digitalization of this sector. Digital marketing needs content marketing to be alive and digital media have transformed how the brands communicate with the customers (Klein et al., 2020).
As a more detailed form of digital, we have social media marketing, where marketing takes place in several social media sites such as Facebook, Instagram, or Twitter, aiming to raise brand awareness and customer retention and satisfaction (Lehnert et al., 2021). Social media platforms act as facilitators, providing a path to establish communication with customers, helping deliver the message the brand wants to convey since the brand may connect with customers in a more interactive and personalized manner (Singh & Mathur, 2019). Considering social media main functions (to respond, monitor, amplify, and lead customer behavior) it is very important to know how, when, and where social media influences customers on their journey when making purchasing decisions in order to outline marketing strategies (Varghese & Agrawal, 2021).

2.2. Content Marketing

2.2.1. Concept & Aim

The Content Marketing Institute (n.d.) describes this construct as a "strategic marketing approach focused on creating and delivering valuable, relevant, and consistent content to attract and retain a clearly defined audience and, ultimately, to drive profitable customer action". Sam Decker, CEO of Mass Relevance, adds depth to this idea by stating that content marketing aims to create or curate non-product content whether it is educational, informational or entertaining, and publish that content according to contact points with customers so they can pay attention to it and be closer to the brand, making it a powerful way to reach the customers, wherever they are (Singh & Mathur, 2019).

2.2.2. Buyer Persona

Brands must bear in mind that content marketing efforts only have a favorable outcome if they are delivered to the right person, at the right way and at the right time (Kaila, 2020). The first step to understand customer challenges, address the concerns they care about and offer tailored solutions, is to create a realistic buyer persona with the aim to understand their motivations, resistance to purchases, concerns, pains and anxieties of the target audience (Lehnert et al., 2021). According to these authors, five categories must be followed in order to develop an accurate profile of each persona: *personal/professional demographics* such as geographic location or socio-economic status; *values and emotions* regarding both personal and professional life; *motivations and intentions*; *concerns* such as general difficulties or resistance to change and, lastly, *communication/search styles* which refers to the understanding of what kind of information customers search, their media consumption, etc. The drawing of this "semi-fictional representation" is accomplished throughout marketing data (Smith, n.d.) such as website traffic or the understanding of the kind of information the persona looks for, engages and how he/she gathers and uses product-related information (Pharr, 2018).

2.2.3. E-Retailing

The e-retail world has online-only retailers and multi-channel retailers, as well as features (customer-to-customer online recommendations, online word-of-mouth, user generated content) that increase the possibilities for e-retailer-to-customer interactions. E-retailers need to analyze the existing differences between online shopping experience and in-store shopping experiences, becoming important to clarify the process of online consumption (Grewal & Roggeveen, 2020).

To Mangiaracina et al. (2009), the eCommerce Customer Journey Map goes into five phases: (1) *site landing*, where several tools such as offers and promotions drive the user into the dedicated landing page; (2) *product discovery*, a search process supported by features such as "search and filtering", "sorting and ordering", "category browsing" or "product preview"; (3) then the *product presentation* with the price, images or other media, reviews and recommendations and also cross-selling opportunities, making up for the lack of physical contact; (4) *cart management*, being the phase where the customer can see all the products chosen, the overall cost, the shipping options and added services as recommendations, wish list, among others and, finally, the (5) *checkout process* that provides payment options, order options and tracking, etc.

2.2.4. Content Strategy

Outlining a good content strategy requires considering not only the quality of the content marketing but also the characteristics and needs of the target to tailor the content and identify the best way of promoting it (Yaghtin et al., 2020). According to Rose (2013), content marketing is a strategy since it uses content to strengthen the brand's relationship with customers, but it is the field of content strategy that manages content as a "strategic asset across the entirety of the organization".

A well-defined strategy of content marketing aims to build a positive brand image among customers, so it is fundamental to consider key factors such as the analysis of the target audience and the metrics for the type of content, its impact, and promotional channels as well as the frequency and goals of content marketing (Koob, 2021). The purpose of content marketing is to attract and maintain customers by producing content with relevance and value in order to modify or reinforce customer behavior (Chaffey & Ellis-Chadwick, 2019), helping customers solve their problems and meet their needs with useful and pertinent content, winning their trust and admiration, as a guided approach, increasing their loyalty through the content, creating a powerful brand (Singh & Mathur, 2019).

2.2.5. Content Marketing Formats

While creating content, it is needed to know that it is not a "one-size-fits-all" approach, as it must be tailored for each platform and to have a greater impact across channels must be delivered at the right time (Lopes & Casais, 2022).

Lehnert, Goupil and Brand (2021) state that when creating valuable content, it is needed to: discover the types of ads are commonly shared on social media and the ones that are easily ignored; figure out which of the media type customers value most and create suitable content; select a social media for it (example: Instagram for the pictures and YouTube for the videos); create and know the metrics to measure the success of the content (clicks, tome, views or conversions).

There are several forms of content, ranging from the most basic formats such as video, image, and text to more complex ones such as blogs, eBooks, infographics, slideshow presentations or interactive content. Each one of them has advantages and disadvantages so it is important to consider the context and the characteristics of the target audience (Lopes & Casais, 2022).

2.2.6. Relation between Digital Marketing, Social Media and Content Marketing

As Hollebeek and Macky (2019) state, digital marketing "is the creation and dissemination of relevant, valuable brand-related content to current or prospective customers on digital platforms to develop their favorable brand engagement, trust, and relationships vs directly persuading customers to purchase" (p.32).

According to Soares, Dolci and Lunardi (2022), through new communication channels such as microblogs and social networks, customers talk not only with friends or relatives concerning their shopping experience but also seek opinions and consult user reviews as part of their decision-making process.

In summary, "if digital marketing is very broad, and social media marketing is a secondary category of digital, then content marketing is the precise focus of inbound marketing" (Lehnert et al., 2021, p.8).

2.3. Customer Journey

Customer needs and behaviors are changing, and their purchase journey is being influenced by several digital touchpoints, in which customers shift between distinct online platforms before taking a decision (Kaila, 2020). Hence, companies now are shaping customers' paths, designing, and refining journeys, instead of only reacting to the journeys that customers devise, having this shift in strategy, from reactive to proactive, making journeys an important factor in providing competitive advantage (Edelman & Singer, 2015). Customer journey analysis is inside the domain of customer experience management (Pharr, 2018), being the customer experience a broader and multidimensional construct "focused on a customer's cognitive, emotional, behavioral, sensorial, and social responses to a firm's offerings during the customer's entire purchase journey" (Lemon & Verhoef, 2016, p.71).

2.3.1. Stages of the Customer Journey

There are several frameworks proposed for the structure of customer journeys. Court and colleagues (2009) structured the decision-making process within four phases, being a circular journey, from the moment when a customer is aware of the product or service (1. initial consideration); research potential purchases (2. active evaluation); buys it (3. closure); and then experiences the brand (4. post purchase). Similarly, Kaila (2020) identified 4 stages, considering a Customer Purchase Funnel: “awareness” at the top of the funnel; at the middle of the funnel we have the “consideration”, in which the user considers several options in order to buy and engages with the business; at the bottom we have the “purchase”, where the user buys the service or the product and then we have the “delight” stage, whereupon the user is converted into a customer, being satisfied with the service or the product bought and may evolve to a loyal customer or a brand advocate. More recently, Chaffey (2022) talks about The RACE Framework, an acronym that stands for stages: Reach, Act, Convert, Engage, being these components the four stages of a marketing framework. Each one of these four steps is paired with tools and methods that aim to apply the most suitable content techniques across all the key touchpoints in the customer journey, from the exploration stage to the advocacy one.

Even though there are some models that present four stages, this paper will follow the sectioning approached by Lemon and Verhoef (2016), widely recognized and cited, being the customer journey conceptualized in three overall stages: pre-purchase, purchase and post-purchase.

The pre-purchase stage refers to the customer’s entire experience before the purchase. It starts with the acknowledgement of the necessity, goal or impulse which leads to considering a way to satisfy that necessity with a purchase, covering all aspects of the customer’s interaction with the brand and environment, the exposure to several information sources or media touchpoints, before making a purchase decision (Lemon & Verhoef, 2016). Here customers start to collect brand information and evaluate the available brands (Klein et al., 2020). On a client level, the behaviors associated with this phase are the need for recognition, search, and consideration (Lemon & Verhoef, 2016).

The purchase stage encompasses the interactions between the customer and the brand and its environment during the purchase (Lemon & Verhoef, 2016). The customers' behaviors included in this stage are choice, ordering and payment (Lemon & Verhoef, 2016).

The post-purchase stage includes all aspects of the customer's experience following the actual purchase that relate to the brand or service/product itself (Lemon & Verhoef, 2016). During this third stage, the customer can become loyal to the brand (through repurchase and further engagement) or reenter the pre-purchase phase once again, considering alternatives, including the "loyalty loop" as part of the overall customer decision journey (Ieva & Ziliani, 2018). Hence, the behaviors associated with the post-purchase stage are use and consumption, post-purchase engagement and service requests (Lemon & Verhoef, 2016).

The model for the customer journey developed by the authors (Figure 1) can be found bellow.

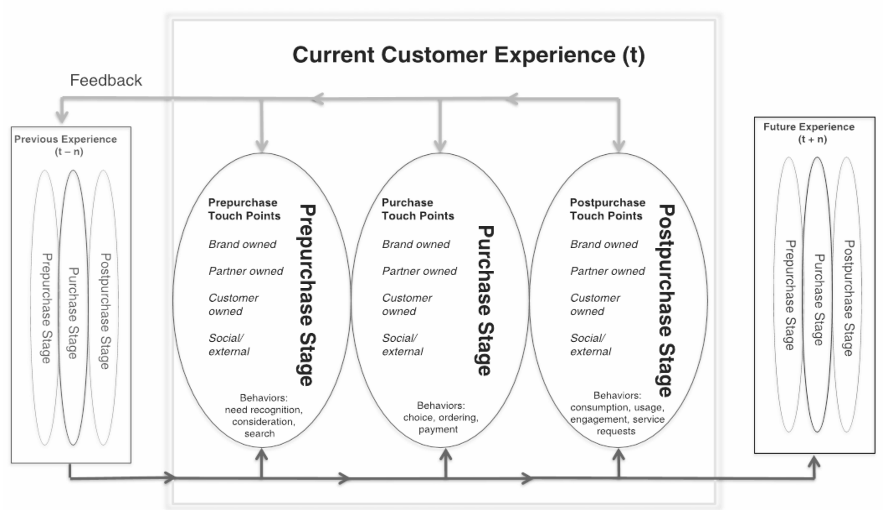

Figure 1. Process model for customer journey (Lemon & Verhoef, 2016, p. 77)

2.3.2. Touchpoints

A customer experience consists of specific contacts between the customer and the firm at several points, named *touchpoints* (Roggeveen et al., 2020). They are building blocks of customer journeys, hence, customer journeys are described as a sequence of touchpoints (Roggeveen et al., 2020).

According to Følstad and Kvale (2018), tracking the experience at each touchpoint is very important to have a stronger understanding of how the experience may be improved along the decision-making process. Each touchpoint is an opportunity to engage the customer and a brand experience (Bommel et al., 2014).

Lemon and Verhoef (2016) state that there are four types of touchpoints in the customer journey and their relevance may differ according to the nature of the product/service or the customer journey itself. *Brand-owned* touchpoints are designed and managed by the firm and it has full control over them, for example advertising, websites, loyalty programs and any brand-controlled elements of the marketing mix. *Partner-owned* are touchpoints not only controlled by the firm but also for one or more of its partners, which can be multichannel distributions partners, marketing agencies, among others. *Customer-owned* are interactions that occur during the experience that are under customer's control, for example, the individual consumption and usage of the product acquired. Lastly, *social/ external/ environmental* touchpoints acknowledge the impact of the roles that others have in the customer experience, influencing it in both solicited and unsolicited ways, for example, other customers, independent information sources, peer influences and social environments.

Taking a different kind of classification, Baxendale et al. (2015) present six touchpoint types: brand advertising, in-store communications, retailer advertising, peer observation, word-of-mouth and traditional earned media. Baxendale et al. (2015) also affirm that there are customer-firm interactions on the several stages of the customer journey and some of them are firm-initiated and others are customer-initiated, being these last ones predominant in the pre-purchase phase, but nowadays they are also growing in number in the purchase and post-purchase phases. According to Lemon and Verhoef (2016), it is relevant to know critical touchpoints, named "moments of truth" that have more weight on key customer outcomes. The importance of these moments of truth relies on being the touchpoints where customers develop an opinion about the service or the product and may also change a perception about a brand, and they can happen in any stage, so being influential at those touchpoints may be a game changer (Kaila, 2020). Kaila (2020) identifies three steps inside this moment of truth: ZMOT (Zeroth Moment of Truth), where the user creates the need for the service or the product and wants to pursue the purchase, seeking for information, reading online reviews, watching videos, and asking for peers' opinion. Then there is the FMOT (First Moment of Truth), where the user contact with the advertiser and advises about the intention to buy and buy the service or the product and finally, the SMOT (Second Moment of Truth), that is the post-purchase experience in which the customer may share reviews or provide online feedback.

2.3.3. Multichannel Perspective

A multichannel approach allows a company to reach customers in multiple ways and to tailor its message to the specific strengths of each channel (Gao et al., 2020). Additionally, it can help provide a consistent brand experience across all channels and provide a better overall customer experience (e.g. Lemon & Verhoef, 2016).

In their work, Lemon and Verhoef (2016) clarify the role of channels in the customer journey: channels differ in benefits and costs (which will determine the usage of a channel for a specific stage of the journey); customers differ in their preference and usage of channels per the stages, and specific multi-channel segments may also defer regarding customer characteristics; in the purchase funnel, channel choices can be affected by one another (due to channel inertia, lock-in effects, and cross-channel synergies).

Chapter 3: Case Study

This case study is electronic retail-based, particularly in the large appliance category, with Worten being the target of a more detailed analysis due to its leadership in this market in Portugal.

The data presented here was collected through websites, scientific journals and previous studies, whose topics were considered appropriate, not only because of the subjects addressed in the literature review, but also regarding the themes used in the market research. Worten also provided reports which were used as a basis for this case study.

3.1. Worten and its Market Positioning

Worten belongs to SONAE group, a Portuguese multinational company with businesses in retail, technology, shopping centers and telecommunication. In the first nine months of 2022, Sonae achieved a 10.4% growth in turnover, reaching 5,493 million euros while Worten reached 836 million euros.

Inside SONAE, Worten holds the electronics retail area, through the brands Worten (home appliances, customer electronics and entertainment) and Worten Mobile (mobile telecommunications). Worten started its activity in 1996 in the retail electronics market, with its origin fields being home appliances and customer electronics. Nowadays there are more than 4000 collaborators in Portugal and Spain, as well as more than 210 physical stores in both countries, with an increasing investment on the online stores Worten.pt and Worten.es.

Aiming at bringing the best of technology to everyone, today and forever, Worten ensures an omnichannel experience for customers. At the end of January this year, it launched a new website, enhancing the customer experience and reinforcing its positioning as a “one stop shop” in terms of navigation. Worten has successfully integrated more than three million products of several categories: large and small appliances, cell phones and smartwatches, computing, TV and sound, gaming, games and toys, photography, drones and video, home and decoration, DIY (do-it-yourself) and garden, sports, mobility, beauty and health, baby and toddler products, fashion, books, music and ticketing, office and stationery, pets and supermarket.

Regarding its positioning in products purchased, Worten is the market leader in Large Household Appliances (46% vs 12% Rádio Popular – next best player); in Small Household Appliances (46% vs 11% Amazon); Printers, Game Consoles, Sound or Image Products and Video Game Accessories. Video Games, Telecommunications Accessories and Music or

Movie Items are among the categories that have a bigger challenge to face. As far as Worten's competition is concerned, the main threat in several categories remains Fnac, especially in Music and Movie Articles. Amazon, in the categories of Computer Accessories, Telecommunications and Photography or Ali Express, which is the leader in telecommunications accessories, are also affecting positioning in products purchased.

3.2. Retail Challenges

The year 2022 was full of landmark events, from the releasing of pandemic restrictions to the Ukraine war, and they all left its trace on the population's consumption habits, leading the retail sector to think of new strategies and new practices.

Also, due to product inflation we paid more for less and people are facing a loss of purchasing power. Choices in product baskets have been modified to meet the customer's budget. We have more eco-friendly habits, and digital streaming subscriptions have been cancelled. For low-income families, the adaptation process was the most complex since their purchasing power decreased. Consequently, the number of purchases dropped the most. Retailers will face a big challenge to provide more affordable options this year. Likewise, it is necessary to consider not only the shopping experience, but also payment options, flexibility in receiving and returning products, loyalty options and security.

The new customers' behavior forces retailers to adopt different business models. In the Deloitte's study (Retail Trends 2023) four major trends were identified in the retail sector. As to the first trend – unlock value for a profitable sustainable growth – companies need to maximize their assets, improving and creating efficiency in all areas of their business. Secondly, the experience and innovation, following the changes in customer behavior along their journey, companies must be closer to their customer, promoting interaction and encouraging the growth of communities. It is also relevant to be where the customer truly is: social commerce and gaming. Similarly, retailers need to offer immersive, technology-filled stores to meet the search for physical experiences. Thirdly, the responsibility to act on the biggest concerns we have for our planet and society, adopting measures that meet one's net zero commitments is another trend. Finally, keeping the focus on the company's employees and their well-being, working not only on the recruitment but also on the retention, taking seriously what really matters to its collaborators. Alongside, a strong and empathic leadership is a very important topic, whether for cost reasons or to focus on the customer experience. In addition to this, artificial intelligence may be the most disruptive trend in the retail sector in

2023: it can be used to customize the shopping experience, analyze data, or predict behaviors. Also, to optimize inventory's management and repetitive tasks, create chatbots to answer customers or automated image recognition for products on online context, allowing an easier search.

Still on the same subject, Accenture Report Retail Trends 2022 mentions eight tendencies to be taken into consideration: e-commerce influencing a new age of digital retail; social media as a "one-stop-shop" for content, inspiration and interaction; stores redesign to improve experience, bearing in mind that 90% of the product choice and decision are completed before the customer enters the store; resulting initiatives on environmental, social and governance scope; resale offerings - which are influenced by individualism and the search for sustainable products; vertical integration, analytics and automation on supply chain management; keeping up with the digital and smart experience expected by customers and talent development inside the companies.

GFK concludes also that task simplification, consumption comfort, time, and tasks optimization as well as the search for more interactive experiences come up as future trends.

After analyzing the companies within the top 10 retailers of top 250 Deloitte 2022 (Global Powers of Retailing), present in Appendix C, we can see two Portuguese companies: Jerónimo Martins and Sonae. Sonae is present in 62 markets (Continente, Worten, Sport Zone, Wells and Zippy) and now occupies the 144th place (it has risen 14 positions since 2021), having reached consolidated revenues of US$7.6 billion (increase of 7.6%).

Large home appliance market, the category on which this case study and methodology focuses most had an increase in sales, as large appliances were up 13% in 2021, compared to 2020.

3.3. Retailers' Competitive Analysis (electronics/ home appliances)

Regarding the electronics/ home appliances retail in Portugal, the most relevant competitors are: Worten (which was already analyzed), Fnac, Rádio Popular, Media Market, Amazon, PCDIGA, Auchan (Box) and Ali Express. The following research includes a description of the big players.

1) Fnac

Known for cultivating difference, its varied shopping experience and customer service, this company offers a big diversity of products available in stores as well as several services such as the Fnac Laboratory, the Fnac Clinic, different shipping methods, exclusive campaigns for Fnac Card Members, Click in Store and Marketplace offer. It also guarantees an omnichannel experience to its customers.

Fnac is not only committed to informed choice and responsible consumption but also to a vision that aims to change the world through its passion for culture and innovation. It owns several types of stores: specialist, proximity, travel, connect, cheap bookstore, university and there is also the CUF Tejo store.

2) Rádio Popular

Motivated to serve better and better those who visit them and aiming at providing everyone with the best technology at the best prices, Radio Popular has more than 50,000 products on display, having one of the largest offerings in the national market, embracing products from distinct categories such as sound and image, small and large appliances, computers, entertainment, photography, among other areas.

It currently has 56 physical stores throughout the country, including Azores and Madeira, and an online store with an increasingly wide range of products. In response to the rise of its online sales (more than tripled in the last two years) that led to a high increase in the volume of home deliveries, Rádio Popular has recently opened a new logistics center to be able to respond more efficiently to online orders, home deliveries and the quick supply of products in physical stores. Rádio Popular operates in a competitive market, consequently its e-commerce strategy focus on the customer and his/her needs, guaranteeing delivery within 48 hours and investing on more sustainable practices.

3) Media market

A German company arriving in Portugal in 2004, with the goal of bringing everything that is technology closer to the customer, Media Market offers the best technology, the best assortment at the best prices. It holds stores in Benfica, Sintra, Aveiro, Braga, Alfragide, Rio Tinto, Gaia, Leiria, Setúbal, Matosinhos and an online store.

Known for selling solutions and having provocative campaigns, it was the first company to have a VAT-free Day.

It also offers a set of specialized services that complement the offer such as protection services for equipment, picture and sound, computer and photography and smartphone, installations of the equipment and a personal shopper online to clarify customer doubts about products or services, available even by phone or video call.

4) Amazon

Born as a digital bookstore, Amazon has become the world's largest e-commerce company. It is an American multinational technology company, aiming to be the most customer-centric company on earth. This being its starting point, it focuses on e-commerce, cloud computing, streaming (Prime Video, Netflix's competitor) and artificial intelligence. In the hardware segment it owns the Kindle, the world's most popular book readers' gadget and it also developed Alexa, a virtual assistant launched in 2014. Amazon offers the Prime package, a highly popular subscription that guarantees access to free shipping on products sold on its platform, as well as other benefits.

It is considered one of the biggest / top five technology companies, along with Google, Apple, Microsoft and Facebook.

In 2022, Amazon spent US$1.2 billion at gaining technologies and expertise to serve the customers better. Also, Amazon was betting on physical stores in some markets in 2021 but it has already announced the closure of several stores as sales from its physical channels represented only 2% of its total revenues.

5) PCDIGA

Leader in Portugal in the field of specialized IT, PCDIGA is committed to continuously offer the best prices and campaigns to the customer, displaying strong promotional campaigns of selected products throughout the year. It is known for its know-how in the industry as well as exclusive contact paths to the corporate market.

PCDIGA offers several services with a greater distinction in after-sales service and it owns stores in Leiria, Parque das Nações, Benfica, Porto, Braga and Vila Nova de Gaia. It focuses on the online store and the digital world, being present in Facebook, Twitter, Instagram, Youtube and TikTok since dominating the technological world is its prior aim.

3.3.1. Online Brand Share and Shopping Penetration

Analyzing the online results of these retailers, in the Online Channel Electronics Buyers study, prepared for Worten by Netsonda for the 3rd quarter of 2022, the positioning of the main retail players in electronics/ home appliances was evaluated through a quantitative study (3000 interviews) on online shopping and the recommendation level of each online shopping website. The following analysis is based on that report.

It was found that 72% of customers bought some product online and the top 3 online shopping stores in this category are Worten, Fnac and Amazon. Regarding the websites, Ali Express displays a website where most telecommunication accessories are purchased while Fnac is the favorite online store to purchase Music or Movie Items. It is also important to highlight Amazon's good positioning, being the 2nd store in the ranking where most Small Appliances, Sound or Image Products and Computer and Telecommunication Accessories were bought.

Concerning NPS (loyalty metric), Worten's website has an NPS of 52, 1pp above Fnac and Amazon's still has the highest recommendation level for an online purchase (NPS=71); concerning spontaneous awareness**,** 61% of the 3000 respondents mention Worten as top of mind and even considering only the online universe, the Pure Players (Amazon and PCDIGA) still appear with spontaneous awareness well below the Omnichannel Players. Fnac, Rádio Popular and Media Markt show a stagnation as we can see in figure 2.

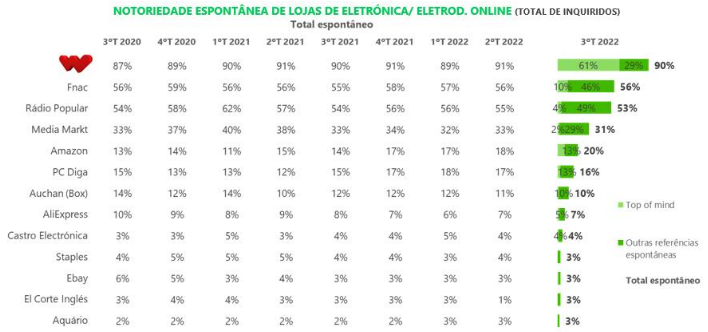

Figure 2. Spontaneous awareness of online electronics/appliance stores

As far as online shopping penetration is concerned (figure 3), Worten continues to be the store with the highest penetration, 44%, while the second place is very much contested between Fnac (21%) and Amazon (18%). However, there has been a noticeable growth of Amazon since 2020, overtaking Rádio Popular, Media Markt and PCDIGA.

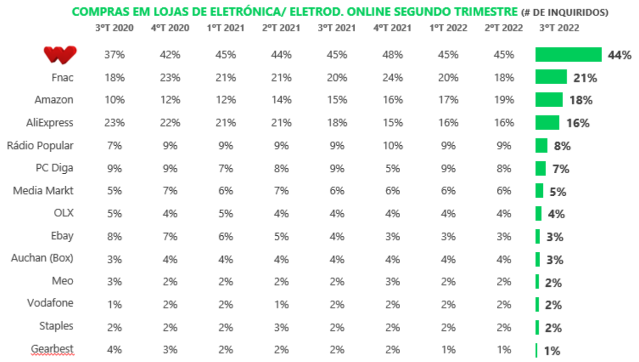

Figure 3. Purchases in electronics/appliances stores online second quarter 2022

Regarding the incidence of online purchasing, 72% of respondents said that they buy products online and 44% that they have already bought electronics/appliances online. In the large appliances category the incidence of online purchasing is only 8% (figure 4). This data has relevance to the study of the omnichannel, being a category that needs more intense research, with an alternation in the customer journey between online and offline channels, having here the need for involvement with the physical in store. On average, these respondents bought 1.7 Large Appliances online in the 3rd quarter of the year and despite their low incidence of online purchase (8%), the washing machine, fridge and freezer and dishwasher were the most bought products, with Worten being the market leader in the purchase of these subcategories.

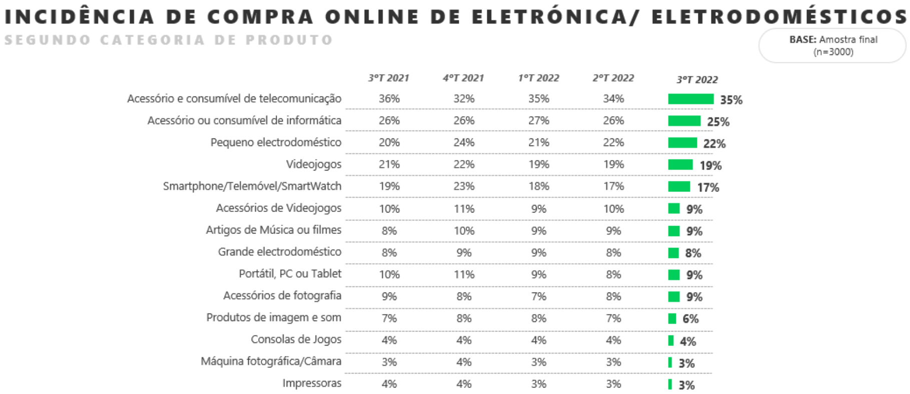

Figure 4. Incidence of online purchase of electronics/appliances

3.3.2. Global NPS: Online and Offline Dynamics

Relating to the online and offline of these retailers, the following analysis was based on a study provided by IMR (Marketing Research Institute) to Worten on Global NPS, in a total of 3000 respondents, on 4Q2022.

Comparing with insignias Bricks and Clicks (brand that uses omnichannel), Worten is the brand with the highest awareness, showing stability in relation to other competitors. It is also the brand with the highest customer consideration/ credibility in the large appliances category. It maintains the % of brand users, also increasing the purchase in the last 6 months (+4.3pp) (figure 5). As for the Pure Players Ecommerce (brands that sell entirely online), which brought more competition to the market increasing polarization and choice for customers, Amazon grows again in all indicators (figure 6).

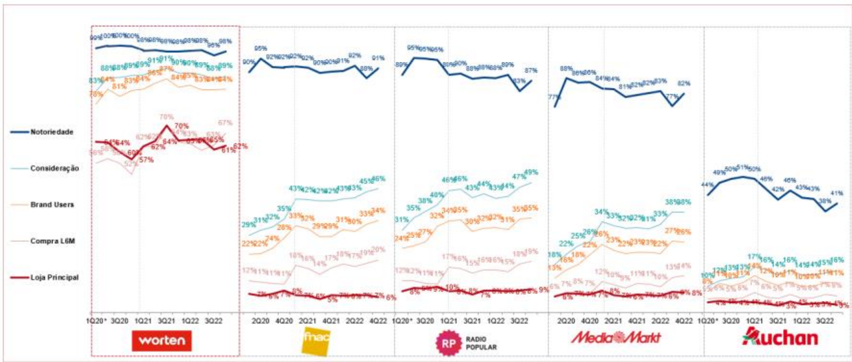

Figure 5. Retailers Analysis Worten vs Bricks & Clicks

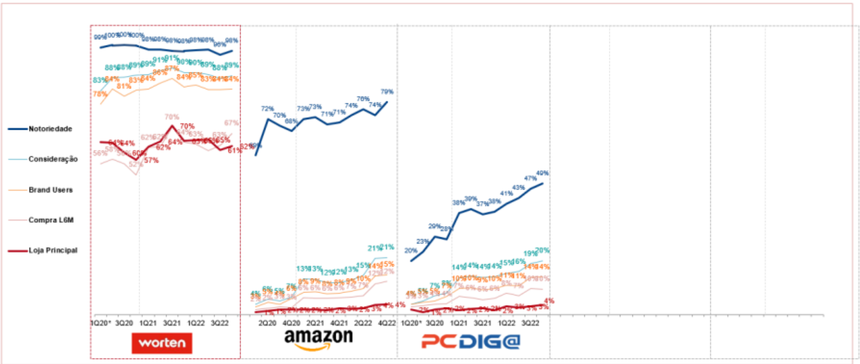

Figure 6. Retailers Analysis Worten vs Pure Players

In year-to-date NPS, Pure Players continues to lead, followed by Worten, and in the quarter studied, Worten and Amazon were the only players with a slight NPS advance (+0.6pp and +0.9pp respectively).

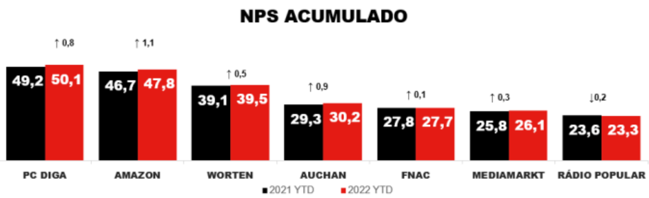

Figure 7. Year-to-Date Retailers NPS

Taking a closer look at Worten, they are losing exclusives brand users (showing a more competitive market with less exclusive brand users and more omnichannel customers) but they are earning shared brand users, due to market polarization, having a growing trend: the shared ones have been recommending Worten even though they tried new stores and companies.

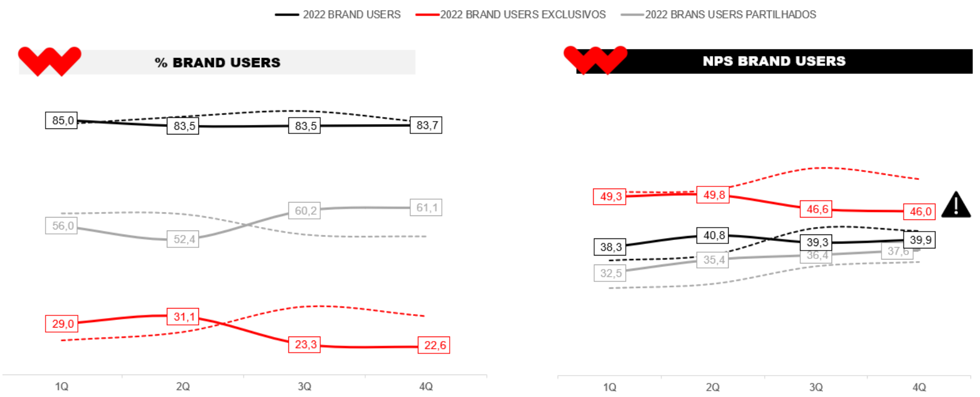

Figure 8. Net Promoter Score: Worten Brand Users

PCDIGA and Amazon remain the fastest growing brands in shared brand users with Worten.

Analyzing the brand user’s profile that goes to Worten, it has become more adept of omnichannel since 2022. In 4Q22, we see the physical store profile improving its NPS, reaching the highest value since 2022 (42.5). The omnichannel profile has the same NPS value as last year and the online-only profile is in a negative trend since 3Q22, being below the same period last year (-3.5pp).

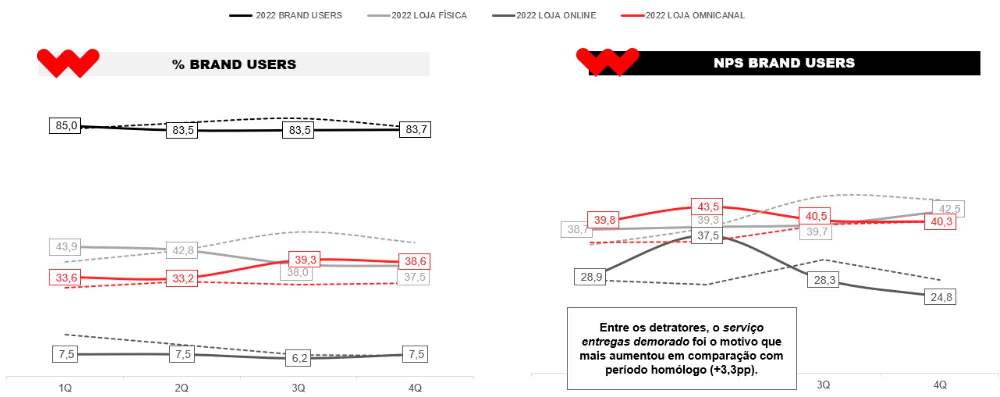

Figure 9. Worten Brand User Profile

On the dimensions that impact the NPS analyzed in this study, credibility and convenience in the offer weigh the most (37%), followed by in-store experience (22.2%) and price perception (21.4%). To Worten in particular, all of them were down compared to 2021 (-1.6pp, -13.5pp and -11.8pp respectively).

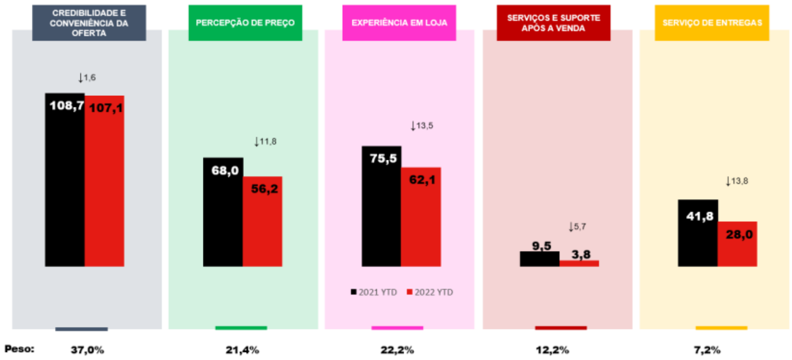

Figure 10. Worten Evaluation Dimensions that Impact NPS

Inside the metric “credibility and convenience in the offer”, there is the ease of purchase on the website, the frequent existence of new/innovative products, the ease with which the customer can find the products he or she is looking for and the information available on the website to search for products. As for the in-store experience, the metrics are governed by the store environment and tidiness, technical knowledge, and the ability of employees to understand needs and present adequate solutions, and the waiting time in the store.

Evaluating these metrics for competitors as well, Amazon and PCDIGA stand out in the ease of purchase on the website, as well in the information available on it.

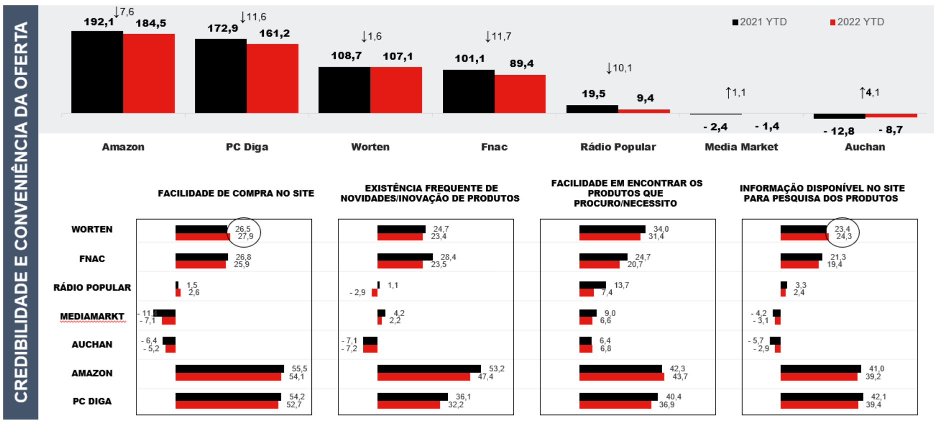

Figure 11. Retailers Evaluation Dimension Credibility that Impacts NPS

Fnac continues to distinguish in-store, being much stronger in atmosphere and storage and PCDIGA continues to lead in technical knowledge.

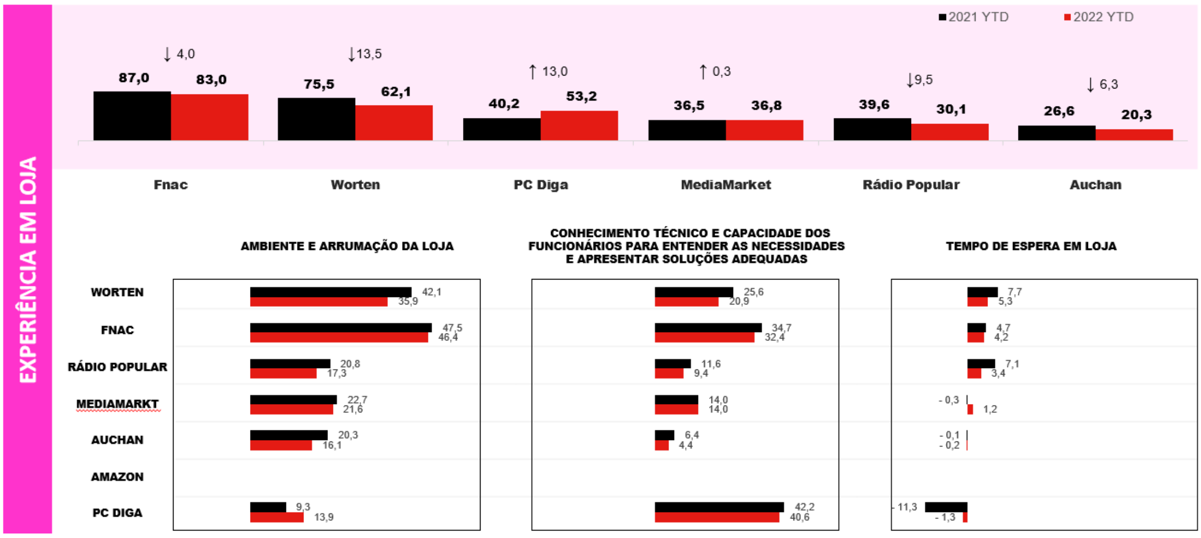

Figure 12. Retailers Evaluation Dimension Experience In-Store that Impact NPS

3.4. The New Customer

To meet customer's expectations, retailers must pay closer attention, as 36% of customers are more and more looking for than just products or services, they want brands aligned with social causes, corporate social responsibility (CSR) initiatives and diversity.

Funneling to retail sector in Portugal and the Portuguese customer, Adyen Retail Report (2022) analysis brings us the insights below.

The customer is increasingly smarter, more demanding, concerned about environmental issues, thrifty and ethical. Besides the challenge of the pandemic, now 2022 with the war in Ukraine has also had its impact on the customer, leveraging concerns such as the cost of living and energy prices. 4 out of 10 Portuguese say they lost purchasing power between 2021 and 2022. Due to this, 81% of customers in our country took greater advantage of discounts, offers and loyalty programs; 56% of customers admit cutting on shopping and 79% admit to waiting for periods of sales or special sales to do their shopping. 70% would download a merchant's app to receive better bonuses or loyalty rewards. For 44% of Portuguese, the price of goods continues to be more important than the ease of the shopping experience.

7 out of 10 Portuguese like to be able to choose among several payment methods at the time of purchase and 4 out of 10 say that they would be more loyal to a retailer that allowed them to buy in-store and pay online, or vice versa. Therefore, stores must consider fluidity when paying, offering the payment method of the customer's choice. Payment's security is also a factor to be considered, as 61% of respondents say they don't like stores to

keep their payment data, preferring to always insert it, while 90% consider double authentication of their card (e.g., sending an SMS or additional biometric identification) very good as it provides greater security and comfort.

Only 4 in 10 Portuguese prefer to shop in physical stores; 50% customers preferred online shopping compared to the previous year (2021); 69% prefer to use a computer to do their shopping and, if commerce allows it, 45% of customers will use their own smartphone to order or finalize purchases. Also, 75% of customers expect stores to allow online ordering and in-store pickup, and 35% customers will leave their cart if there are too many steps in the checkout process.

To be loyal to a brand, the Portuguese people want the retailer to allow an online purchase and return in store (63%) and to allow them to buy an out-of-stock item in store and have it delivered directly to their home (67%). Also, 69% of the Portuguese will not buy from stores where they have already had a bad experience.

Reducing the environmental footprint is also something that customers value: almost half of generation Z, Millennials and generation X, plus 43% of the 52-65 age group, take into consideration how retailers contribute to the community or care about the environment. Thus, today's customer is responsible and focused on sustainability, expecting the same behavior from the brand he/she buys from, being willing to pay even more for a sustainable product than for a non-sustainable product. Most retailers in the top250 Deloitte 2022 are now placing the sustainability of the brand and their products at the heart of their business strategies, to meet customer concerns.

Following the CLAB study - Portuguese Customer Trends Change 2022 - during the pandemic, 65% got to know and tried stores or brands they didn't know before, 53% opted for more online shopping than before the pandemic years and 16% say that the online channel is now their favorite. The customer is becoming more and more demanding, having practically "zero tolerance". For example, Amazon has contributed to the increase in customer expectations, by shortening the average delivery time from 8 to only 2 days in the early 2000s. In home appliances, 28% of respondents consider 2 days as the appropriate delivery time for an online purchase. The customer also no longer values the checkout operator in some contexts, as 36% use and prefer self-service checkouts.

The customer of the future is omnichannel while the retailer of the future must optimize the channel-to-channel and total experience, crossing different channels. Retail brands are starting to move towards the digital future, such as Continente, which opened the first cashier-less store in Portugal; Aldi which uses facial recognition to authorize the sale of age-restricted products; Walmart which ensured the storage of purchases with the direct-to-your-refrigerator service, among others. However, there is also a digital fatigue that moves customers to physical stores looking for humanization and sensory stimuli. 75% of European customers would be willing to change their shopping behavior if retail spaces were more experiential. 73% of customers buying online, compared to buying in a physical store, feel a loss regarding the impossibility of feeling the object and 41% have the feeling that the experience is poorer. 63% consider that large commercial spaces could offer more "surprise factor" in their experience.

3.4.1. Online Purchasing Behavior in Portugal

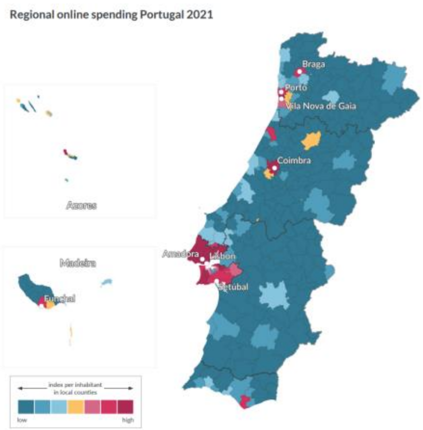

Figure 13. Regional online spending Portugal 2021

Regarding online purchasing behavior in Portugal, we can see an urban-rural contrast (figure 13), with the purchasing power and age of the population in the region being influential factors. The Lisbon region clearly stands out. It is information to consider for a retailer in its omnichannel strategy and logistics planning.

3.5. Omnicanality – A Reality to Stay

Successful companies combine the physical and digital environments to create the best possible customer experience, refusing to depend on just one channel.

According to the analysis on this topic from Adyen Retail Report (2022), more than half of the Portuguese already shop online regularly and 7 out of 10 will not shop at a retailer where they have had a bad shopping experience, offline or online. Most customers say they are most likely to shop online and 69% use their computer to shop, 60% use their smartphone and 15% use their tablet to make a purchase. 53% of respondents only buy online from stores they know. Not only trust must be considered, but simplicity is also important as 56% do not buy from websites or applications that are difficult to navigate while 37% pay attention to the design of the website or online store. 34% of respondents of this same study do most of their shopping on marketplaces. The "phygital" concept, where the purchase is hybrid and the customer has the power to decide in which environment each step of his journey should occur, will be a reality, so retailers must allow the customer to see the product in the store, in person, buy it online even inside the store and then receive it at home, on the date desired, and then exchange or return it in the physical store. Therefore, the brand must be present in several channels to allow different points of contact with its customer. That’s why it is necessary to invest in technology, such as new payment methods, virtual or augmented reality solutions and artificial intelligence, managing to relate everything in a customized way for the customer to provide more complete shopping experience. For this personalization, 41% of the respondents of this same study prefer stores that recollect the preferences and behaviors of previous purchases. According to these respondents the display of items in the store is also important for 47% of the respondents, and it is relevant that stores operate more like a showroom rather than just being a shelf display. Responding to customer demands for brand loyalty, retailers want to improve delivery options and optimize the customer journey across multiple sales channels.

Physical store is the most used sales channel (48%), followed by the web (28%), APP (12%) and social media (12%). However, even if social channels are betting on online shopping, purchases through websites are still the most common practice (73%). According to this same report, 39% of customers prefer to shop in a physical store while almost half of the customers prefer a mobile web page due to its simplicity and convenience it offers (one-click payment, free shipping, etc.). As for the physical store, most retailers consider that the economic instability will require cost reduction (67%), so pop-up stores may be a solution to this challenge, as they are based upon a lower cost and ease of setting up and taking down.

As regards digital channels, nowadays social media, mobile apps and e-commerce are changing customer’s purchasing habits. According to PWC (2022), research has shown that 82% of customers check product availability online before going to a store, so the need to have an omnichannel experience becomes now more important than ever. Across platforms, websites and social media customers are providing insights regarding their behavior that can be used to map a meaningful experience. In addition, according to the Marktest Consulting study, “The Portuguese and Social Networks 2022”, 80% of the Portuguese population remember the advertisements they viewed on social networks.

3.5.1. Home Appliances Customer Relationship with Omnicanality

In a study carried out by IMR (Research Marketing Institute) for Worten, regarding the first half of 2022, electronics and home appliance buyers were questioned on channel adherence through 800 answers to a survey. Three key insights came from it: omnichannel lost customers due to the decreased impact of sanitary conditions (-9.8pp compared to 2021); exclusive buyers in the physical channel increased, reaching pre-pandemic values (49%) and Pure E-Buyers have also increased, meaning that some customers are consolidating the shopping habits acquired or strengthened during the pandemic period. This study points out that 48% of respondents shop for electronics/appliances only in store, 24.3% shop only online while 27.8% shop both in store as well as online. Worten customers are still more adept of omnichannel, although there has been a decrease (33.1%). However, omnichannel among competitors' customers only reaches 18.9%. The proportion of Worten Pure E-Buyers customers has also increased (from 16.7% to 18.9%).

3.5.2. Electronic/Appliances Purchase

The research before purchase

Look at the research stage in the customer journey, before the purchase, 94.4% of these customers state they do some research before making a purchase. Compared to 2021 (97.1%), there was a slight decrease in this practice due to the rising visits to physical stores along with a rise in directed store selection (they go directly to the preferred store) and buying on impulse, especially lower value items. It can be concluded that the purchase is still rational. To do this research, customers use a multichannel strategy, store (43.4%) and online, tending to be diversified in the sources, with an average of 2.2 online sources, especially omnichannel competitors' stores (71.2%), price comparators, such as Kuanto Kusta (59.6%) and pure e-sellers' stores (54.2%). The search ends up being more focused on the product than on the place the customer may buy, and its subjects are varied: main product selection criteria: price, promotion, as well as technical features. Secondly, brands and the characteristics of delivery terms are issues customers are interested in. Only after these topics are covered, they research about the nearest stores, methods and terms of payment or additional services. As for Worten customers, they are still very attached to price and promotion.

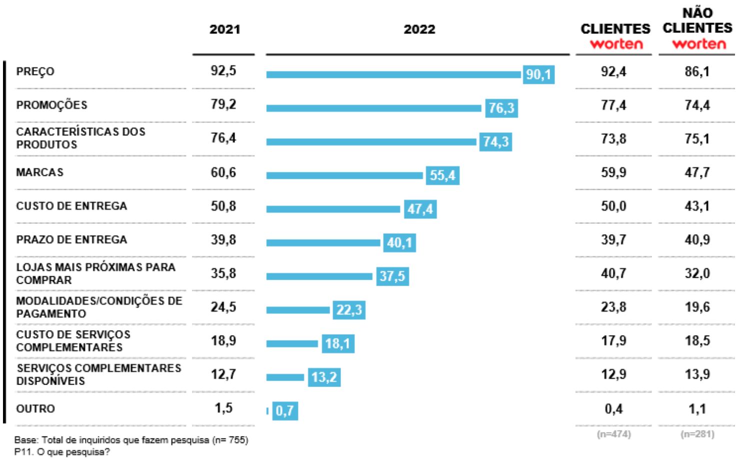

Figure 14. Research topics before buying appliances

Selection of physical stores to buy

Overall, the average frequency to physical stores decreased (from 1.7 to 1.4), along with the average frequency to online stores (from 1.9 to 1.5).

When it comes to the selection of physical stores to buy from, promotions have a strong influence, focusing on its types (direct discount), its adequacy (attractiveness of products and discounts) and promotional pace. As far as promotional conditions are concerned, a trade-off is made with convenience, as there is interest in the proximity of the store and ease of access to it. In a multichannel approach, ease of research (38.1%) and the existence of an online store (36.4%) are reference points when choosing a physical store. For customers who are not price seekers, the shopping experience is very important, choosing stores based on the perceptions associated with human interaction (type and quality of service, ease of purchase and variety). As for additional services, there are more cross-selling tools than traffic generators, occurring only in about 15% of shoppers.

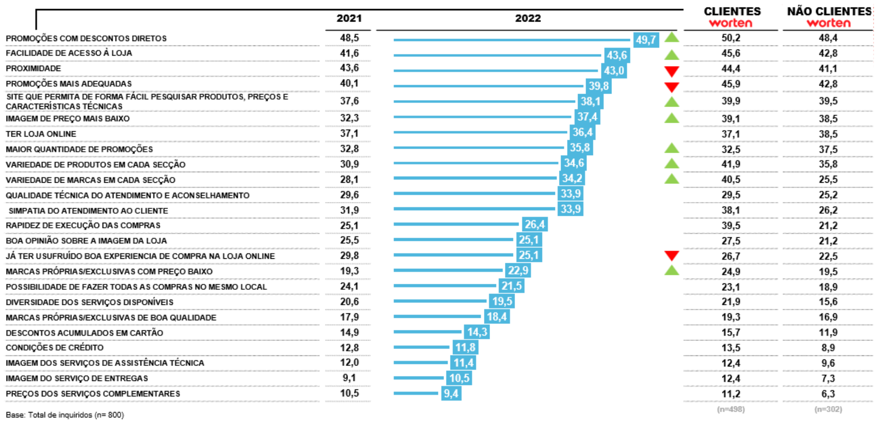

Figure 15. Reasons for choosing the physical store

Selection of online stores to buy

This selection is strongly influenced by research features, promotions, and usability. The information details and the ease of searching appear in the top 3 most valued elements, and the promotional impact is key to capturing traffic and interest in the purchase, which is an important point if the online store is not to be just a place for consultation. Usability is also a requirement, since the online customer wants to see adequate and understandable information, product visibility, and an easy way to make the purchase. Security is another factor that the retailer must consider as the customer requires a diversity of payment methods and confirmation of order execution, and finally, customers value the visual attractiveness of the website.

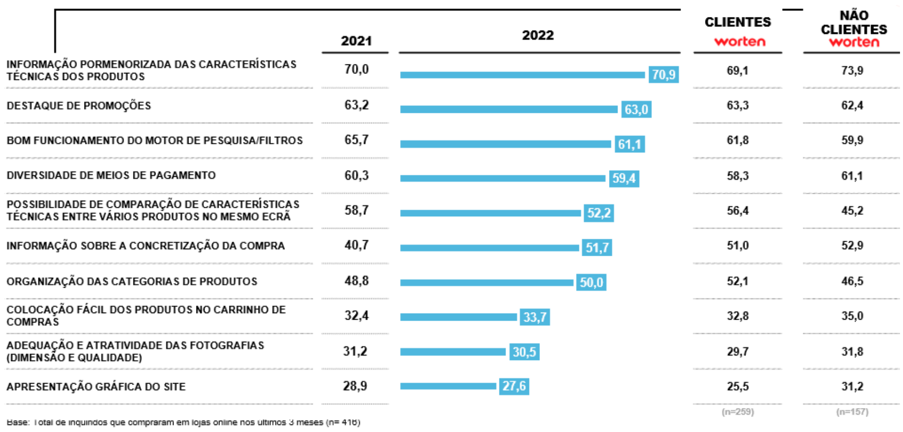

Figure 16. Reasons for choosing the online store

3.6. E-commerce Outcomes

Due to the pandemic and consequent isolation measures, customers had to become more digital, accelerating the shift to e-commerce. There is an estimate that worldwide ecommerce will reach, in 2023, at least 35% share of chain retail sales. In 2026, ecommerce is expected to represent 40% of chain retail.

For retail customers in Portugal, keeping the user on the webpage, not redirecting the customer to pages that are not consistent with the brand and providing the payment methods mostly used is essential. E-commerce sales in Portugal have reached 3.4% of total sales between January and September 2021, and in that period in 2022 the percentage fell to 2.5%. The post pandemic return of customers to physical stores, and especially the customers over 65 years old account for this fact.

3.6.1. Impact of E-Commerce on Physical Stores

The accelerating growth of e-commerce brings its consequences for physical stores, whose share of chain retail falls from 85% in 2016 to 80% in 2026. That is why it is so necessary for retailers to rethink how they can change the in-store concept. Per Edge by Ascential study, in 2022, the Store of the Future model identifies three priority areas for retailers. Optimizing the value that comes from stores by synchronizing the online and offline experience through technology is retailers’ main priority. This means working on the experiential side, helping customers connect with retailers through education, entertainment, and more; creating a social environment with opportunities for customers to interact with each other; finally, having a frictionless experience in integrating online and offline as well as providing a differentiated assortment and fostering product discovery. The second priority area consists of driving operational efficiency by controlling margins and managing operating costs, while using store space as a fulfillment solution, adding convenience and capability is regarded as a final priority.

3.7. Future trends of digital transformation

The digital, continues to grow, impacting and transforming shopper habits and commerce. That being said, retailers must focus on digitizing their business and adopting a hybrid, "phygital" model, combining the physical and digital experience. 38% of retailers are said to have an active digitization strategy, 73% state they are not even worried about having a physical store while 82% are taking the opportunity to sell through new social channels. Currently the main concerns of Portuguese retailers consist of optimized payment experiences

(82%), customer management system to improve service and marketing (82%) and applications to optimize customer experience (81%).

According to the CLAB study, Portuguese Customer Trends Change 2022, customer confidence in technology is increasing and more than ¾ of people (76%) recognize that their daily activities depend on technology. Investments have been made in the areas of VR (virtual reality) and AR (augmented reality), for example: in August 2021 TikTok announced it was developing its own AR platform called TikTok Effect Studio while Snap bought Vertebrae which helps brands create 3D versions of their products. As reported by Deloitte study (Retail Trends 2023), artificial intelligence will be decisive to boost productivity, disrupt the creative process, reduce the time launching of new products and enable facilities at self-checkouts and click and collect points.

With respect to gaming, about 2/3 (61%) of British adults admit that gaming with friends and family played a crucial role in the confinement while in Portugal, 22% adults played more and, 31% of these say that meeting with friends was one of their motivations, influencing the social behavior. In line with this exposure to a technological evolution and virtual experiences, 63% of respondents (N=600) admitted it was interesting to be able to participate in tests and give their opinion on the evolution of online shopping platforms, especially regarding the brands they liked the most. That’s why it is highly important for retailers to be close to the customer, listen, understand, and test ways to improve online experiences.

63% of respondents in the Adyen Retail Report (2022) believe that retailers should use technology to make loyalty/reward systems easier and more effective and 35% like brands to use advanced technologies such as augmented reality, virtual reality, and smart mirrors to enhance the shopping experience.

Chapter 4: Market Research

After the investigation carried out in the case study, market research was carried out to understand how the customer of large appliances behaves throughout their purchase journey. Concepts present in the literature review were applied and it were also studied specificities analyzed about each retailer in chapter three.

4.1. Methodology

The present investigation had a convenience sample of 151 participants, 121 of which answered the questionnaire in total (73 females and 48 males). Most are in the age group of 25 - 34 (N = 57).

An online survey on Qualtrics (see Appendix A) was set up to collect the data, available in Portuguese during the month of December 2022. The questionnaire has four sections: demographic questions, pre-purchase, purchase, and post-purchase. The data were analyzed in JASP 0.15.0.0.

4.2. Main Results

4.2.1. Sample Description

Considering the sample of respondents (121 participants), 62% of them live in Lisbon and 23% in the Center of Portugal. As of the maximum school degree completed, 42% reported "Bachelor's Degree", 33% reported "Master's Degree" and 8% reported "Postgraduate Studies". Regarding the professional situation, 2.48% of the participants are Students, 85.95% Workers (by their own or employers) and 11.57% are Student-Workers. About Gross Annual Income, 57% wins 10k € to 29.9k € and 30% wins 30k € to 49.9k €. In the Civil State, 48.31% of the respondents are Married, 49.15% Single, 0.83% Widow, 1.65% Divorced and 2 participants did not respond. 29% of the respondents don't have household elements, 25% have 2, 18% have 1 and 16% have 3 household elements.

4.2.2. Customer Journey

The questionnaire is regarding customers of products in the large home appliances category (washing machines, dishwashers, stoves, refrigerators). The remaining data analysis not present in this chapter can be found in Appendix B.

4.2.2.1. Pre-Purchase. When asked about how often they search for products online before making a purchase, 52.89% of the participants answered “Always” and 40.50% “Most of the time” (Question 1).

While regarding the search for products in a physical store before the purchase, 44.62% of the participants answered “Rarely”, 29.75% “Most of the time” and 16.52% answered “Never” (Question 2).

In the chart below we can compare the distribution of participants by the answers of questions 1 and 2.

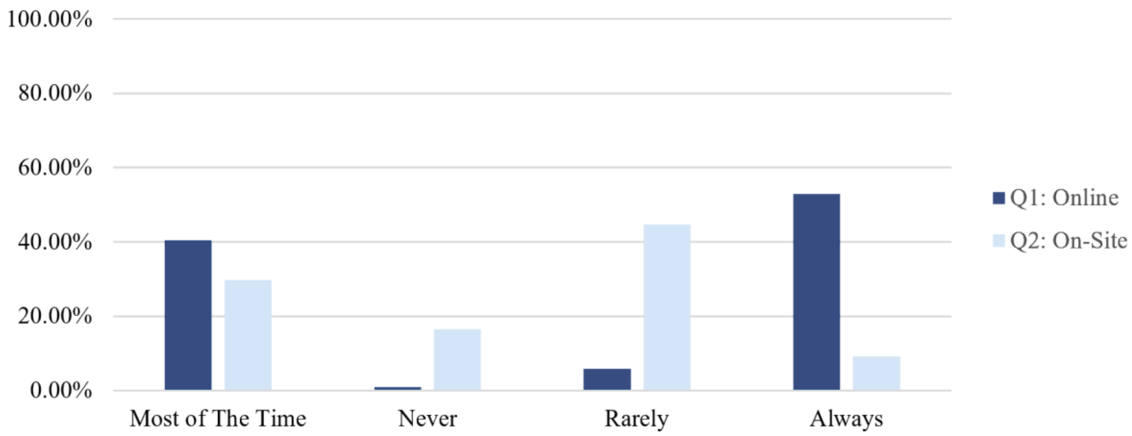

Figure 17. Distribution of the participants' answers in Questions 1 and 2

The majority of participants (71.9%) consider that it is important to be influenced by the brand as soon as possible on their shopping journey (Question 3). Regarding the statements from Question 4:

- 90.08% of the participants start the process of looking for information about a product as soon as they recognize the need/or desire to buy it;
- 95.04% state that their past buying experience affects their next purchase decision;
- 81.82% of the respondents often ask for recommendations/opinions from friends and/or family about these products;
- 79.34% take into account recommendations and references through social networks, even if they are not those of the brand itself;
- 55.37% tend to be influenced by campaigns on the social networks of the brand itself;
- 70.25% take more in mind recommendations and references from friends/family than ads from the brand itself;
- 74.38% use both channels, online and offline, to search for a product;
- 95.87% consider that online search is useful for comparing product attributes;

- 58.68% don’t like to participate in quizzes, games and/or online hobbies organized by brands to know more about the products;
- 62.81% affirm that it is important to see, touch and feel a product before buying it;
- 70.25% often ask questions to employees in store to help them with the search for the product;
- 96.69% affirm that most of their purchases of large appliances are by necessity and not by impulse;
- 83.47% always ponder one brand more over another when it has promotions or discounts.

The most valued variables for the participants when looking for product information about the product to buy (Question 5) are presented in the figure below:

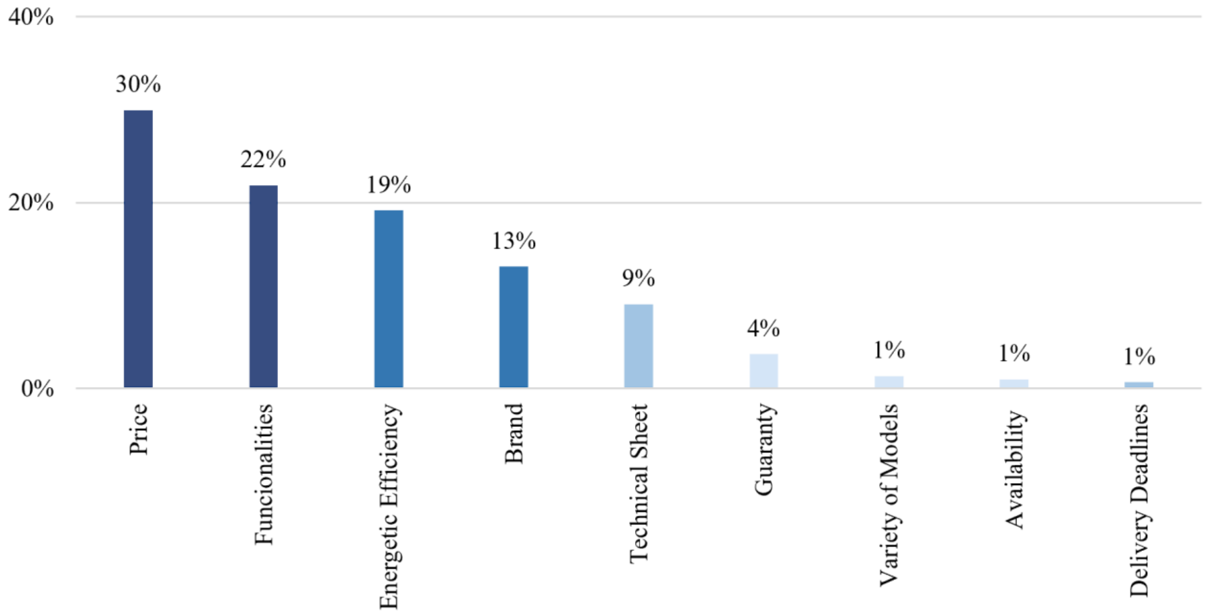

Figure 18. Percentage of answers about the most valued variables for the participants when looking for product information

When asked about the preferred format type for product information (Question 8), participants prefer “videos” (18%), followed by “with the store employee” (11%) and then testimonies, friends/family, text and images (10% each).

Concerning the channels to get product information (Question 29), “website” (24%) is the preferred, followed by “on-site store” (16%), TV (16%), reviews (13%), google (9%), social media (8%) and YouTube (8%).

Nonetheless, before buying a product from the category of large appliances (Question 7), 97% of the participants usually look for information online about it. In the chart below, the amount of physical stores (Question 32) and online stores (Question 34) visited before buying the product are compared:

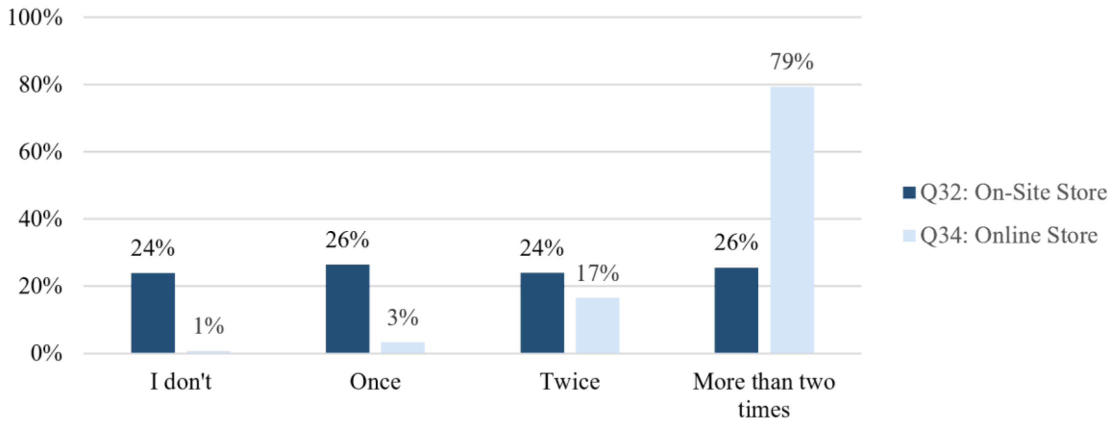

Figure 19. Percentage of visits to Physical Stores vs Online Platforms

On average, 65.29% of the participants invest more than 30 minutes in comparing large appliances from different brands (Question 30) before making the purchase. We can see the frequency table below concerning the time invested.

Q30	**Frequency**	**Percentage**
<10 min	3	2.48
10 – 15 min	4	3.31
16 – 30 min	35	28.92
>30 min	79	65.29

Table 1. Q30 Response Frequency Table

A Pearson Correlation was run between Q30 (time invested before purchase), Q32 (number of physical stores visited) and Q34 (number of online platforms visited).
Only items Q30 and Q34 present a relationship, meaning that the amount of time invested before the purchase comparing brands is associated with the number of online platforms

visited ($r = .20$, $p = .040$). The same pattern was not visible for physical stores ($r = .06$, $p = .490$).

4.2.2.2. Purchase. Regarding how long it takes between when the customers know they want to buy the product and the moment they actually buy it (Question 31), the data is the following:

Q31	Frequency	Percentage
Less than a week	26	21.49
One week	30	24.79
Two weeks	24	19.84
More than two weeks	41	33.88

Table 2. Q31 Response Frequency Table

Aiming to understand the relationship between searching online vs in physical store and how long it takes until the moment they actually buy a product, a Spearman Correlation was done between the item Q31, Q1 ("how often do you search for products online before making a purchase?") and Q2 ("how often do you search for products in a physical store before making a purchase?"). As expected, Q1 and Q2 have an inverse significant relationship ($r = -.29$, $p < .001$). However, the correlation between Q1 and Q31 as also Q2 and Q31, although significant in the first case, are both weak ($r = .21$, $p = .020$; $r = .07$, $p = .460$).

87.6% of the participants claim to have already searched online about the price or opinion of other customers while in a physical store (Question 33).

When asked about how likely it is to buy the products below online at the expense of buying in physical store (Question 35), the results are the following:

Q35	Never	Occasionally	Most of the time	Always
Large appliances	16.53	35.54	15.70	32.23
Small appliances	11.57	30.57	28.10	29.75
Beauty, fashion, health, and baby products	11.47	25.62	34.71	28.10
TV, video, and sound	19.84	33.88	22.31	23.97
Mobile phones and TV packages	14.05	33.88	23.14	28.93
Computers and Accessories	9.92	33.88	26.45	29.75
Gaming, Games and Toys	13.22	21.49	30.58	34.71
Books, Music, and Movies	6.61	32.23	23.97	37.20
Tickets	4.13	14.05	38.84	42.98
Photography, Video and Drones	18.18	34.71	27.27	19.84
Office and Stationery	24.79	42.149	17.36	15.70
Home and Decoration	26.45	38.84	21.49	13.22
Bricolage, Garden and Animal Products	32.23	42.15	14.05	11.57

Table 3. Q35 Response Relative Frequency Table (Percent)

The store to buy large appliances most famous among the participants of the study is "Worten" (95.8%). "Fnac", "Media Markt", "Rádio Popular" and "Box / Auchan" were mentioned as well (Q36).

Regarding the act of buying online, 53% of the participants consider they are online customers of large appliances (Q37).

As shown in the table below, online customers of large appliances present significant differences in the answers to question Q35 (how often they buy this type of products online). As expected, – compared to non-online customers – these participants are more likely to buy items (of various categories) online to the detriment of the physical store (p < .05), apart from household items and decoration, where there are no significant differences between participants of the two groups (p = .138).

	t	df	p
Large appliances	10.804	119	< .001 [a]
Small appliances	7.913	119	< .001
Beauty, fashion, health and baby products	4.717	119	< .001
TV, video and sound	8.121	119	< .001
Mobile phones and TV packages	4.626	119	< .001
Computers and Accessories	5.695	119	< .001
Gaming, Games and Toys	5.864	119	< .001
Books, Music and Movies	5.730	119	< .001
Tickets	4.342	119	< .001
Photography, Video and Drones	4.315	119	< .001 [a]
Office and Stationery	3.513	119	< .001 [a]
Home and Decoration	1.495	119	0.138 [a]
Bricolage, Garden and Animal Products	2.064	119	0.041 [a]

Note: [a] indicates that the Levene test has statistical significance ($p < .05$)

Table 4. *T-student tests* for Q35 question categories between online and non-online customers

On the matter of purchase frequency (Question 39), 48.8% of the participants buy large appliances from 2 to 2 years. Importantly, 38.8% answered they do not buy this type of product online.

In Question 42, participants were asked to mark “yes” or “no” about a set of statements. The main results can be explained as it follows:

- More than 70% of the participants answered “yes” to:
  - “The more product information the website provides, the safer I feel to buy online”
  - “Online categorization of products makes it easy to analyze the purchase”
  - “I use my phone when I'm in the physical store”
  - “When I'm in the store, interaction with the seller makes it easier for me to make a decision”
  - “Making the purchase online is more convenient”
- Participants tend to agree with:
  - “Technical information (...) of online products are sufficient to buy online”
  - “I use the online platform more as a catalog (...), I prefer to buy in the physical store”
  - “I only buy online from brands I'm already familiar with”

- "I usually join loyalty programs or membership cards to enjoy benefits at the time of purchase"
- "Product design (packaging) influences my decision making"

- The majority of participants answered "No" to:
  - **"**The place in store where the items are on display influences my decision-making"
  - "Online customer service is better than in-store customer service"
  - "I only buy in physical stores of brands with which I am already familiar"

According to the participants, the most important reasons to make the purchase online (Question 43) are: "How products are cataloged and organized" (14%), "Reviews of other customers" (11%), "Variety of offer of available products" (9%), "Content (images, photos, texts, sounds, music)", "Simple, organized and fluid navigation" and "Access to products that do not always exist in physical stores" (8% each).

Based on Question 45, Large Appliances (laundry machines, dishwashers, stoves, refrigerators, air conditioning products), Small Appliances (microwaves, mini ovens, vacuum cleaners, food preparation products) and Bricolage, Garden and Animal Products are the categories participants prefer to buy from the physical store (25%, 20% and 14%, respectively).

The comparison between products of different brands (19%), Customer service with the assistance of sellers (19%) and View, touch and feel of the product (16%) are the most valued experiences in the physical store (Question 46).

When asked if their purchase decision is influenced by external factors, the results are as follows:

Q47	Frequency	Percentage
Never	1	0.83
Rarely	20	16.53
Most of the time	58	47.93
Always	42	34.71

Table 5. Q47 Response Frequency Table (influence of promotions, discounts or other reward)

Q48	Frequency	Percentage
Never	9	7.44
Rarely	49	40.50
Most of the time	36	29.75
Always	27	22.314

Table 6. Q48 Response Frequency Table (content found on social media)

Also, the majority of participants claim to «Most of the time» buy products online after seeing them in physical stores (Questions 49 and 50).

The items Q47, Q48, Q49 and Q50 are all strongly correlated ($r \geq .50$, $p < .001$) meaning that the influence of promotions, discounts, other reward, and content on social media has on the clients is associated with how likely and how often they buy a product online after seen it in a physical store.

At the exact time participants are determined to buy a product (both online or offline), the most valuable information are Testimonies and Comparisons with other brands.

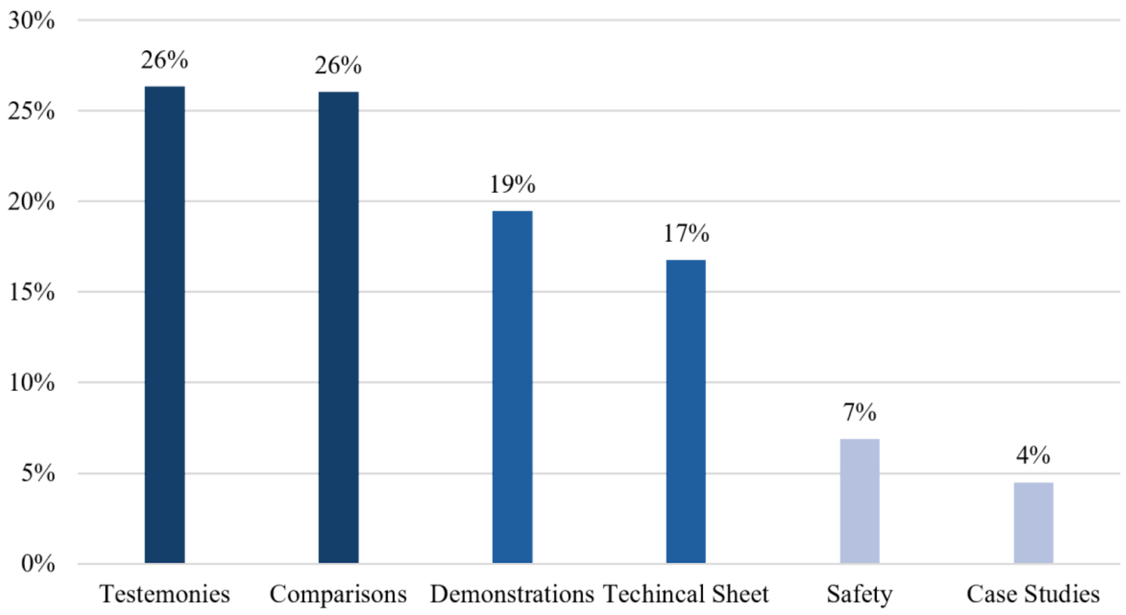

Figure 20. Percentage the answers about the most valued information at the exact moment participants are determined to buy a product

4.2.2.3. Post-purchase

The first questions about the post-purchase stage concerns what is important for the participants so they will re-enter a purchase on the same brand. The results are described in Table 7.

Q55	It's not important	Little Important	Indifferent	Important	Very Important
Correct delivery of the product.	0	0	3.30	28.10	68.60
Exchange or return policies.	0.83	0	4.13	52.07	42.98
After-sales customer support (e.g. willingness to solve problems).	0	0	1.65	23.97	74.38
Brand interaction with the customer after purchase (e.g., follow-up of purchase satisfaction).	3.31	9.09	19.0	33.88	34.71
Payment method.	5.79	5.79	19.84	50.41	18.18
Product warranty.	0	1.65	4.13	36.36	57.85
Customer service.	0.83	0.83	4.13	38.02	56.20
Availability of offer.	0.83	1.65	6.61	52.89	38.02
Loyalty programs.	6.61	9.92	27.27	37.19	19.01
Cross selling and up selling products to improve the customer's results.	7.44	9.92	25.62	50.41	6.61
Reward for recommendation given to friend / family and this ends up buying.	8.26	4.96	29.75	42.98	14.05

Table 7. Q55 Response Relative Frequency Table (Percent)

Based on Question 58, it turns out that participants often make recommendations to friends and/or family about the products they buy (90% answered “Yes”). However, the same pattern is not found online, being that only 47% of the participants said they often share their shopping experiences on an online platform. Accordingly, only 42% often write reviews on the brands website about their experiences and they usually don’t interact with the brand on social media after the purchase (60% answered “No”).

When asked about what they want to get from the brand after purchasing the product (Question 59), participants refer “Perks Club” (16%), “Warranty term extension” (15%), “Educational Conten” (14%), “First-hand launches of new products and offers” (12%), “Support Material” (10%) and “Suggestions for new products/services” (8%).

Regarding the format type for product information after purchase (Question 60), participants prefer: e-books (22%), videos and emails (14% each), e-newsletters (12%) and text (9%). The favorite channels (Question 61) to consume this information are presented in the following figure.

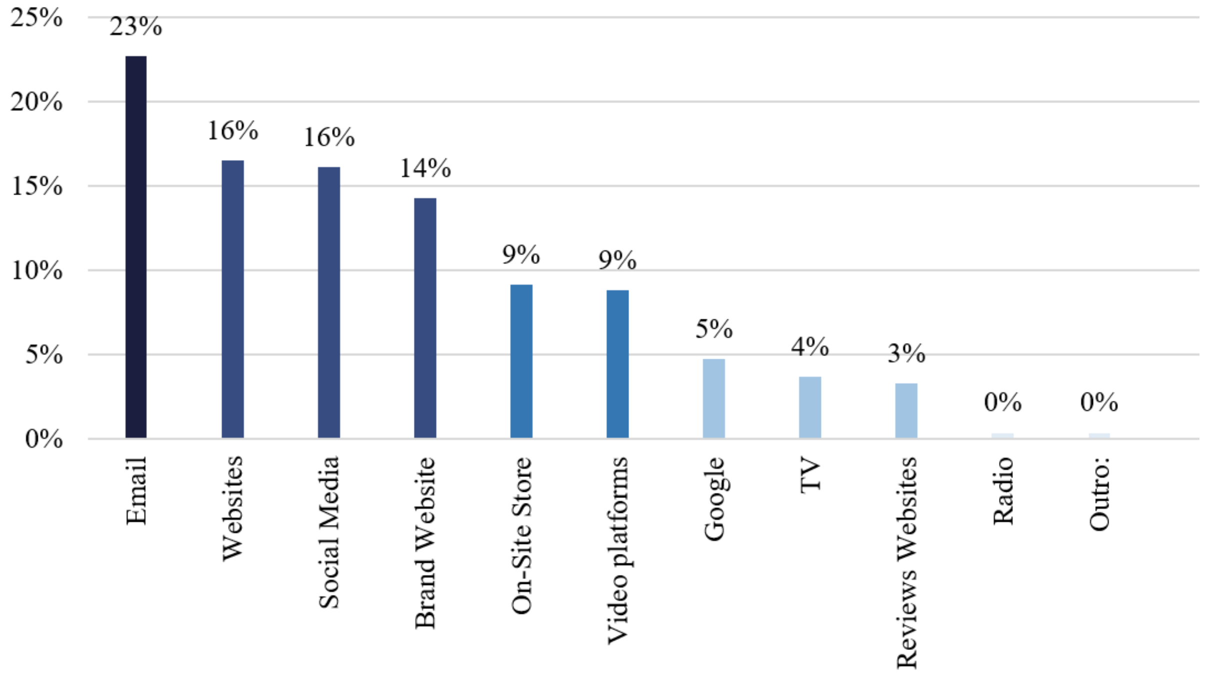

Figure 21. Percentage responses about preferred channels to consume product information after purchase

Chapter 5: Conclusions

As it has been demonstrated along this work, studying the customer decision journey will make the company gain useful insights to revise their marketing strategy and it is crucial to understand several points: which information the customer needs at different points in time, in which format they prefer and through which channel they consider most opportune. All this analyzing the different stages in their buying process to provide valuable and reachable content, being aware if they use more online platforms or physical stores and what do they value most in the experience of buying home large appliances. Retailers need to be close to the customer, with the right message, at the right time.

Considering the data collected from the questionnaire, we have now the conditions to answer to the proposed research questions:

RQ1: What are the roles of digital marketing and retail marketing during the customer journey?

According to the results, digital marketing is more relevant at the pre-purchase stage due to several reasons: customers practically always search for products online and they find the way products are organized and cataloged easier to make attribute comparisons. Also, they prefer to have the information about the product through videos in the first place, being the website the favorite channel to access. Besides, due to the availability of a wide range of products and the simple, organized and fluid navigation allow access to products that do not always exist in physical stores, along with the possibility of getting to know reviews from other customers.

The participants of this study are aware of being influenced by brands' social media campaigns and do consider that making the purchase itself online is more convenient, stating that the more product information the website delivers, the safer the participant feel to buy online.

On the other hand, only in-store offline marketing allows for the clients to see, touch, and feel a product - being that people affirm that the place in store where the items are on display does not influence their decision-making. However, there is an important role of the seller which apparently makes it easier for the participants of this study to decide. In sum, in the physical store, the customer service and the possibility to view and touch the product are the most valued experiences.

Nonetheless, the majority of the customers use both channels (online and offline), so omnicanality is a reality to be embraced. This leads us to the next research question.

RQ2: Is there an interaction between digital and in-store offline marketing?

The results show that the customer journey in buying large appliances can be done holistically using omnicanality, switching between online and offline and its advantages at each stage. Participants claim to use the online platform more as a catalog, taking into consideration recommendations and references through social networks, but then they prefer to buy in the physical. Also, even when at a physical store, customers search for information (as price, opinions and reviews) online.

RQ3: What do clients value at each stage of the customer journey?

At different stages, clients value different types of information (as well as preferred channels):

Pre-Purchase

Before the purchase, while looking for information about the product, the customers value most the price, functionalities, and energetic efficiency. Their favorite channels to seek for this information are the TV, website and physical stores (on-site). concerning the content format type, customers seem to prefer to get information about the product either through videos, with the store employee or by testimonies, friends, family and text.
The participants of this study reported favoring online search for a product due to the way products are organized on the website, the possibility of having reviews from other customers and the variety of offers (compared to physical stores).

Guidelines for the retailer: Working on the need (or creating the need) to buy products in this category, the retailer in the pre-purchase phase should focus on producing content about price, functionalities, and energy efficiency. The retailer can disseminate this information through TV ads and have this data visible on the website in a quick and easy way to access, using video and text, preferably. In-store can also work on communicating these features close to each product and, about the vendor, it is important to have thorough knowledge of these attributes, not only to clarify possible doubts of the client, but also to proactively complement the customer's search, so that he/she can decide with more information coming from a source that he/she considers reliable.

To work on sharing testimonials, it is also interesting to encourage customers, in their post-purchase, to share their experience and provide feedback to be a reference for future customers.

During Purchase

While it is clear participants value a lot of online information, in the moment of the purchase itself, there is also the necessity to visualize the product, touch it as also to talk with the vendor. Also, whether buying online or not, the most important information at the moment of the purchase are comparisons of the product with the same product from different brands as well as the testimonies from previous buyers.

Guidelines for the retailer: Despite considering online shopping more convenient, most participants use the website as a catalogue and finalize the purchase in-store. Therefore, it is important to have a simple and organized navigation, with the largest possible offer and reviews from other customers available. If there is a need for interaction with the vendor, it is advisable to have an online customer service that can address the most frequent questions. Given that the participants' purchase decision is most often influenced by promotions, discounts, or other rewards and also by content on social media, the brand should work both dynamics in order to attract the customer.

In-store, knowing that customers use mobile phones and look online for information about price and other customers' opinions, it is opportune to create an interaction between the physical and the online, to have this complementarity facilitated to nurture the customer's attention (taking advantage of retail trends to boost this experience). Still inside the shop, again the vendor's knowledge is valuable, given the likelihood of interaction with the customer.

This stage can also be analyzed from a cross-selling perspective, suggesting other categories that are most bought online and offline, increasing value for the brand (which were also questioned in the survey).

After Purchase

After clients acquire their equipment, they want to get more information about it on e-books, videos, and newsletters, through channels such as websites, social-media and e-mail. More specifically, clients want to get exclusive offers, perks club and warranty term extension.

Guidelines for the retailer: The correct delivery of the product must be ensured, as well as after-sales support for the customer and attractive guarantee conditions, as these are issues that are extremely important for the customer to buy again from the same brand.

Having a way of building customer loyalty and having a detailed database is opportune for reaching the customers in the way they prefer, presenting the offer they want post-purchase: working on the exclusivity of offers and working on the sense of belonging to a community.

The information written above serves as interesting insights for the managers, marketers, and retailers. Therefore, this study provides knowledge that can contribute to the efficacy of content marketing strategies, by understanding the needs and preferences of customers per stage of their journey, enabling the creation of more relevant content, in the desired format and through the desired channel that will lead to a greater engagement of customers towards the brand. This kind of match will have positive implications on the customer experience, generating not only a positive impression of the brand and all the subsequent benefits (more trust, recommending the brand to others, etc), but also improve the rates of customer retention.

In conclusion, analyzing the competitors' strategy and the future trends of this industry should also be taken into consideration to have a successful brand.

Chapter 6: Limitations and Future Research Insights

This study presents some limitations.

Firstly, it focuses mainly on the purchase journey associated with large appliances thus constraining the presented results to this category. This is a relevant point once different decision-making processes are associated with different kinds of products.

Secondly, this study followed an analysis structure of the buying process considering three main phases. However, there are several models that mention more than three, varying between online and offline customer journeys, meaning that specific information might have been left unaddressed.

Lastly, the current investigation used a convenience sample that might not be representative of the population, leading to inaccurate or biased results that cannot be generalized. Furthermore, this study has geographic limitations, as the sample was restricted to Portugal, meaning that the results could be different in other locations.

Future analysis concerning the customer journey in the context of content marketing could focus on the continuing changes of the field due to technology. The comprehension of the impact of emerging technologies such as virtual and augmented reality could add value to the state of the art, by providing the understanding of how to take maximum advantage of these features to enhance the customer experience. Secondly, as described above this study focused on the purchase process associated with large appliances, so it would be enriching to replicate the study in another type of retail and category, to compare the results and understand the specificities of the customer journeys among different industries, leading to a better fit between the specific needs of the audience and the strategy used. Similarly, research could be carried out with the aim of optimizing the customer journey by integrating different information channels (omnichannel approach) based on different industries, that is, studying in greater depth how the approach to the product can be customized. Finally, in the future it may be interesting to study how sociodemographic characteristics relate to the analyzed aspects.

Hope this dissertation may serve as a basis for future research and motivate the further development of a content marketing strategy considering the customer journey.

Chapter 7: Teaching Notes

7.1 Synopsis

This study was based on the importance of the retailer understanding, throughout the customer journey, which preferences their customers have in terms of content, information, format and chosen channel. A greater focus was made on Worten, as it is the leading company in this retail.

7.2 Teaching Objectives

7.2.1 Target Audience and Teaching Objectives

This study is interesting to be approached for students in the field of marketing and management and retail professionals. This target will have the opportunity to:

- analyze the electronic and large appliance retail sector in Portugal;
- better understand the terms of competitiveness that exist between the major players in this industry;
- understand how the customer of this category prefers to be approached at content level: type of information, format and channel;
- reflect on whether companies should take the customer journey into account when planning their content marketing strategy.

7.3 Teaching Plan

7.3.1 Discussion Questions Suggested

1. What is the importance of content marketing in the marketing strategy? Answer may be found in chapter 2.
2. What are the trends in retail? Answer may be found in chapter 3.
3. How can retailers reach the new customer? Answer may be found in chapter 3.
4. How can marketers take the customer journey into account when planning their content strategy? Answer may be found in chapter 4.
5. How is it possible to adopt a “phygital" strategy towards the customer in this category? Answer may be found in chapter 5.

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Appendix A: Online Survey Questionnaire

The questionnaire was written in Portuguese and all questions were mandatory.

Jornada do Consumidor e Estratégia de Marketing de Conteúdo

Start of Block: Fase da Jornada | Pré-Compra

Q70. Obrigada por ter aceite o convite para participar neste estudo de mercado no âmbito do Mestrado em Gestão com Especialização em Marketing Estratégico da Católica Lisbon School of Business & Economics.
O principal objetivo deste trabalho é perceber qual é a relação que o consumidor do retalho (de retalhistas como a Worten e a Fnac) da categoria de grandes eletrodomésticos tem com o marketing de conteúdo, durante a sua jornada de compra. **Por favor, considere sempre produtos da categoria de grandes eletrodomésticos (máquinas de roupa, máquinas de loiça, fogões, frigoríficos) nas suas respostas.**
Este questionário tem uma duração de aproximadamente 8 minutos e as respostas são voluntárias, anónimas e confidenciais.

Q72. Fase da Jornada do Consumidor | Pré-Compra
Por favor, considere sempre produtos da categoria de grandes eletrodomésticos (máquinas de roupa, máquinas de loiça, fogões, frigoríficos) nas suas respostas.

Q1. Com que frequência procura produtos online **antes de fazer uma compra?**
- Nunca (1)
- Raramente (2)
- Maior parte das vezes (3)
- Sempre (4)

Q2. Com que frequência procura produtos numa loja física **antes de fazer uma compra?**
- Nunca (1)
- Raramente (2)
- Maior parte das vezes (3)
- Sempre (4)

Q3. Considera importante ser **influenciado pela marca** o quanto antes na sua jornada de compra?
- Sim (1)
- Não (2)

Q4. Assinale "Sim" ou "Não" acerca das afirmações abaixo (sobre produtos da categoria "**grandes eletrodomésticos**").

	Sim (1)	Não (2)
Mal reconheço a necessidade/ou o desejo de comprar um produto eu inicio o meu processo de procura de informação sobre o mesmo. (1)	○	○
A minha experiência passada de compra afeta a minha próxima decisão de compra. (2)	○	○
Costumo pedir recomendações/opinião a amigos e/ou familiares sobre estes produtos. (3)	○	○
Tenho em consideração recomendações e referências através das redes sociais, mesmo não sendo as da própria marca. (4)	○	○
Costumo ser influenciado por campanhas nas redes sociais da própria marca. (5)	○	○
Tenho mais em consideração recomendações e referências de amigos/familiares do que anúncios da própria marca. (6)	○	○
Eu uso ambos os canais, online e offline, para procurar por um produto. (7)	○	○
A pesquisa online é útil para comparar atributos de produtos. (8)	○	○
Gosto de participar em quizzes, jogos e/ ou passatempos online organizados pelas marcas para conhecer melhor os produtos. (9)	○	○
É importante ver, tocar e sentir um produto antes de o comprar. (10)	○	○
Costumo fazer questões aos colaboradores em loja para me ajudarem com a procura do produto. (11)	○	○
A maioria das minhas compras nesta categoria (grandes eletrodomésticos) são por necessidade e não por impulso. (12)	○	○
Pondero sempre mais uma marca em detrimento de outra quando esta tem promoções ou descontos. (13)	○	○

Q5. O que mais valoriza **quando está à procura de informação** sobre o produto que quer comprar? Selecione até três opções.

- Preço (1)
- Marca (2)
- Funcionalidades do produto (3)
- Prazos de entrega (4)
- Ficha técnica do produto (5)
- Condições de garantia (6)
- Poupança energética (7)
- Variedade de modelos (8)
- Embalamento (9)
- Disponibilidade para compra (10)
- Outro: (11) __________

Q8. Em que **tipo de formato prefere obter essa informação** acerca do produto que quer comprar? Selecione até três opções.

- Blogs (1)
- E-books (2)
- Texto (3)
- Vídeos (4)
- Imagens (5)
- Podcasts (6)
- Áudio (7)
- Webinários (8)
- Artigos (9)
- Com o colaborador em loja (10)
- Revistas e Jornais (11)
- E-Newsletters (12)
- Testemunhos (13)
- Fóruns de Discussão (14)
- Amigos/ Familiares (15)
- E-mails (16)
- Outro (17) __________

Q29. Por **quais canais prefere obter essa informação** acerca do produto que quer comprar? Selecione até três opções.

- Website da marca (1)
- Loja física (2)
- Televisão (3)
- Redes Sociais (Instagram, Facebook, Twitter, Tik Tok...) (4)
- Google (5)
- Plataformas com vídeo (ex: youtube) (6)
- Email (7)
- Rádio (8)
- Eventos (9)
- Sites de Reviews/ Opiniões (10)
- Outro: (11) __________

Q7. Antes de comprar um produto da categoria de grandes eletrodomésticos, costuma procurar informação online sobre o mesmo?

- Sim (1)
- Não (2)

Q32. Geralmente, quantas lojas físicas visita **antes de comprar o produto**?

- Não visito (1)
- Uma (2)
- Duas (3)
- Mais de duas (4)

Q34. Geralmente, quantas plataformas online visita **antes de comprar o produto**?

- Não visito (1)
- Uma (2)
- Duas (3)
- Mais de duas (4)

Q30. Em média, quanto tempo investe em comparar produtos (grandes eletrodomésticos) de marcas diferentes **antes de fazer a compra?**

- Menos de 10 minutos (1)
- Entre 10 a 15 minutos (2)
- Entre 16 a 30 minutos (3)
- Mais de 30 minutos (4)

End of Block: Fase da Jornada | Pré-Compra

Start of Block: Fase da Jornada | Compra

Q73. Fase da Jornada do Consumidor | Compra
Por favor, considere sempre produtos da categoria de grandes eletrodomésticos (máquinas de roupa, máquinas de loiça, fogões, frigoríficos) nas suas respostas.

Q31. Em média, quanto **tempo** demora entre o momento em que sabe que quer comprar o produto (grandes eletrodomésticos) e o momento em que realmente o compra?

- Menos de uma semana (1)
- Uma semana (2)
- Duas semanas (3)
- Mais de duas semanas (4)

Q33. Já alguma vez, **enquanto estava em loja**, procurou online sobre preço ou opiniões de outros consumidores sobre o produto?

- Sim (1)
- Não (2)

Q35. De 1 a 4, quão provável é, para si, **comprar os produtos abaixo online** em detrimento da compra em loja física?

	1 - Nunca (1)	2 - Ocasionalmente (2)	3 - A maioria das vezes (3)	4 - Sempre (4)
Grandes eletrodomésticos (máquinas de roupa, de loiça, fogões, frigoríficos, produtos de climatização) (1)	○	○	○	○
Pequenos eletrodomésticos (microondas, mini fornos, aspiradores, produtos de preparação de alimentos) (2)	○	○	○	○
Produtos de beleza, moda, saúde e bebé (3)	○	○	○	○
TV, vídeo e som (4)	○	○	○	○
Telemóveis e pacotes de TV (5)	○	○	○	○
Informática e Acessórios (6)	○	○	○	○
Gaming, Jogos e Brinquedos (7)	○	○	○	○
Livros, Música e Filmes (8)	○	○	○	○
Bilhetes (9)	○	○	○	○
Fotografia, Vídeo e Drones (10)	○	○	○	○
Escritório e Papelaria (11)	○	○	○	○
Casa e Decoração (12)	○	○	○	○
Bricolage, Jardim e Produtos para Animais (13)	○	○	○	○

Q36. Quando pensa em comprar **grandes eletrodomésticos**, de que lojas se lembra?

____

Q37. É consumidor **online** de grandes eletrodomésticos

- ○ Sim (1)
- ○ Não (2)

Q39. Com que frequência **compra online** este tipo de produtos (máquinas de roupa, máquinas de loiça, fogões, frigoríficos)?

- Semanalmente (1)
- Mensalmente (2)
- Trimestralmente (3)
- 2/3 vezes por ano (4)
- Anualmente (5)
- De 2 em 2 anos (6)
- Não compro online (7)

Q42. Assinale "Sim" ou "Não" acerca das afirmações abaixo (sobre produtos da categoria "**grandes eletrodomésticos**").

	Sim (1)	Não (2)
As informações técnicas e descrições dos produtos online são suficientes para comprar online. (1)	○	○
Realizar a compra online é mais conveniente. (2)	○	○
Quanto mais informações sobre o produto o site me disponibiliza, mais seguro (a) me sinto a comprar online. (3)	○	○
A categorização online dos produtos facilita a análise da compra. (4)	○	○
O serviço ao cliente online é melhor do que o serviço ao cliente em loja. (5)	○	○
Uso a plataforma online mais como um catálogo de produtos, prefiro comprar na loja física. (6)	○	○
Eu uso o meu telemóvel quando estou a comprar em loja. (7)	○	○
Eu só compro online de marcas com as quais já estou familiarizado(a). (8)	○	○
Eu só compro em lojas físicas de marcas com as quais já estou familiarizado(a). (9)	○	○
Quando estou na loja, a interação com o vendedor facilita a minha tomada de decisão. (10)	○	○
O local em loja onde os artigos estão em exposição influencia a minha tomada de decisão. (11)	○	○
Costumo aderir a programas de lealdade ou cartões de sócio para usufruir de benefícios no momento da compra. (12)	○	○
O design do produto (packaging) influencia a minha tomada de decisão. (13)	○	○
As reviews/opiniões de outros consumidores influenciam a minha decisão de compra. (14)	○	○

Q43. Quais são as razões mais importantes para **fazer a compra em plataforma online**? Selecione até três opções.

- o Modo como os produtos estão catalogados e organizados (1)
- o Conteúdo (imagens, fotografias, textos, sons, música) (2)
- o Navegação simples, organizada e fluida (3)
- o Acessibilidade para consulta em qualquer aparelho (telemóvel, tablet...) (4)
- o Variedade da oferta de produtos disponíveis (5)
- o Serviço ao cliente (chat para tirar dúvidas) (6)
- o Acesso a produtos que nem sempre existem em lojas físicas (7)
- o Acesso antecipado a novidades e lançamentos (8)
- o Maior visibilidade sobre campanhas, descontos e promoções (9)
- o Descrição detalhada e informações técnicas do produto (10)
- o Reviews/opiniões de outros clientes (11)
- o Campanhas exclusivas online (12)
- o Outro (13) __________
- o Nao compro online (14)

Q45. Das categorias abaixo, selecione as que **prefere comprar diretamente na loja física**.

- o Grandes eletrodomésticos (máquinas de roupa, de loiça, fogões, frigoríficos, produtos de climatização) (1)
- o Pequenos eletrodomésticos (microondas, mini fornos, aspiradores, produtos de preparação de alimentos) (2)
- o Produtos de beleza, moda, saúde e bebé (3)
- o TV, vídeo e som (4)
- o Telemóveis e pacotes de TV (5)
- o Informática e Acessórios (6)
- o Gaming, Jogos e Brinquedos (7)
- o Livros, Música e Filmes (8)
- o Bilhetes (9)
- o Fotografia, Vídeo e Drones (10)
- o Escritório e Papelaria (11)
- o Casa e Decoração (12)
- o Bricolage, Jardim e Produtos para Animais (13)

Q46. O que mais valoriza na **experiência de compra em loja física**? Selecione até três opções.

- o Visual Merchandising (comunicação visual ao redor da exposição e dos produtos) (1)
- o Comparação entre produtos de marcas distintas (2)
- o Variedade da oferta de produtos disponíveis (3)
- o Serviço ao cliente com auxílio dos vendedores (4)
- o Campanhas exclusivas offline (5)
- o Localização da loja (6)
- o Maior visibilidade sobre campanhas, descontos e promoções (7)
- o Atributos físicos da loja (iluminação, corredores, layout da loja...) (8)
- o Modo de Pagamento (9)
- o Levar o produto consigo na hora que o paga (10)
- o Possibilidade ágil de troca ou devolução (11)
- o Ver, tocar e sentir o produto (tamanho, textura, cor) (12)
- o Outro: (13) __________

Q47. A sua **decisão de compra** é influenciada por promoções, descontos ou outro tipo de recompensa?

- Nunca (1)
- Raramente (2)
- Maior parte das vezes (3)
- Sempre (4)

Q48. A sua **decisão de compra** é influenciada pelo conteúdo que encontra nas redes sociais?

- Nunca (1)
- Raramente (2)
- Maior parte das vezes (3)
- Sempre (4)

Q49. Quão provável é **comprar um produto online** depois de o ter visto em loja física?

- Nunca (1)
- Ocasionalmente provável (2)
- Geralmente provável (3)
- Sempre (4)

Q50. Com que frequência **compra um produto online** depois de o ter visto em loja física?

- Nunca (1)
- Raramente (2)
- Maior parte das vezes (3)
- Sempre (4)

Q52. Que informação mais valoriza no **exato momento que está decidido a comprar** (online ou offline)? Selecione até três opções.

- Comparações com outras marcas da concorrência (1)
- Demonstrações sobre o produto (2)
- Testemunhos de consumidores (3)
- Segurança do pagamento (4)
- Estudos de caso sobre o produto (5)
- Ficha técnica do produto (6)
- Outro: (7) __________

End of Block: Fase da Jornada | Compra

Start of Block: Fase da Jornada | Pós-Compra

Q74. Fase da Jornada do Consumidor | Pós-Compra

Por favor, considere sempre produtos da categoria de grandes eletrodomésticos (máquinas de roupa, máquinas de loiça, fogões, frigoríficos) nas suas respostas.

Q55. Numa escala de 1 a 5, por favor avalie quão importante para si são os pontos abaixo para que possa **realizar novamente uma compra na mesma marca**.

	1 - Não é importante (1)	2 - Pouco importante (2)	3 - Indiferente (3)	4 - Importante (4)	5 - Muito importante (5)
Entrega correta do produto. (1)	○	○	○	○	○
Políticas de troca ou devolução. (2)	○	○	○	○	○
Apoio ao cliente pós-venda (ex: disposição para resolver problemas). (3)	○	○	○	○	○
Interação da marca com o cliente pós compra (ex: follow-up de satisfação da compra). (4)	○	○	○	○	○
Método de pagamento. (5)	○	○	○	○	○
Garantia do produto. (6)	○	○	○	○	○
Atendimento no serviço ao cliente. (7)	○	○	○	○	○
Disponibilidade de oferta. (8)	○	○	○	○	○
Programas de fidelidade. (9)	○	○	○	○	○
Cross selling e up selling (venda de produtos complementares para melhoria dos resultados para o cliente). (10)	○	○	○	○	○
Recompensa por recomendação dada a amigo/ familiar e este acaba por comprar. (11)	○	○	○	○	○

Q58. Assinale “Sim” ou “Não” acerca das afirmações abaixo (sobre produtos da categoria “**grandes eletrodomésticos**”).

	Sim (1)	Não (2)
Costumo partilhar a minha experiência de compra numa plataforma online. (1)	○	○
Costumo fazer recomendações aos meus amigos e/ou familiares sobre os produtos que compro. (2)	○	○
Costumo escrever reviews nos sites da marca sobre a minha experiência. (3)	○	○
Costumo interagir com a marca nas redes sociais após a compra que fiz. (4)	○	○

Q59. Qual a informação que quer obter da marca **após a compra do produto**? Selecione até três opções.

- Conteúdo educativo (1)
- Ofertas exclusivas (2)
- Expansão do prazo de garantia (3)
- Lançamentos em primeira-mão de novos produtos e ofertas (4)
- Clube de vantagens (5)
- Material de apoio (6)
- Sugestões de novos produtos/ serviços (7)
- Outro: (8) __________

Q60. Em que tipo de formato prefere consumir essa informação, **após a compra do produto**? Selecione até três opções.

- Blogs (1)
- E-books (2)
- Texto (3)
- Vídeos (4)
- Imagens (5)
- Podcasts (6)
- Áudio (7)
- Webinários (8)
- Artigos (9)
- Com o colaborador em loja (10)
- Revistas e Jornais (11)
- E-Newsletters (12)
- Testemunhos (13)
- Fóruns de Discussão (14)
- Amigos/ Familiares (15)
- E-mails (16)
- Outro: (17) __________

Q61. Por quais canais prefere consumir essa informação, **após a compra do produto**? Selecione até três opções.

- Sites (1)
- Loja física (2)
- Televisão (3)
- Redes Sociais (Instagram, Facebook, Twitter, Tik Tok...) (4)
- Website da marca (5)
- Google (6)
- Plataformas com vídeo (ex: youtube) (7)
- Email (8)
- Rádio (9)
- Eventos (10)
- Sites de Reviews/ Opiniões (11)
- Outro: (12) __________

End of Block: Fase da Jornada | Pós-Compra

Start of Block: Consumidor

Q75. Dados do Consumidor

Q62. Em que região do país vive?

- Norte (1)
- Grande Porto (2)
- Centro (3)
- Lisboa (4)
- Alentejo (5)
- Algarve (6)
- R.A. Açores (7)
- R.A. Madeira (8)

Q63. Faixa etária:

- Até aos 25 anos (1)
- Entre os 25 e 34 anos (2)
- Entre os 35 e 44 anos (3)
- Entre os 45 e 54 anos (4)
- Entre os 55 e 64 anos (5)
- A partir dos 65 anos (6)

Q64. Género:

- Feminino (1)
- Masculino (2)
- Outro (3)
- Prefiro não responder (4)

Q65. Nível de escolaridade:

- Ensino Primário (1)
- Ensino Básico (2)
- Ensino Secundário (3)
- Curso Técnico Profissional (4)
- Bacharelato (5)
- Licenciatura (6)
- Mestrado (7)
- Pós-Graduação (8)
- Doutoramento (9)

Q66. Situação profissional:
- Estudante (1)
- Trabalho por conta de outro/ por conta própria (2)
- Trabalhador Estudante (3)
- Reformado (4)
- Desempregado (5)

Q67. Rendimento anual bruto:
- Até 10.000€ (1)
- 10.001€ - 29.999€ (2)
- 30.000€ - 49.999€ (3)
- 50.000€ - 74.999€ (4)
- 75.000€ - 89.999€ (5)
- Acima de 90.000€ (6)

Q68. Estado civil:
- Casado(a) / União de Facto (1)
- Solteiro(a) (2)
- Viúvo(a) (3)
- Divorciado(a) (4)

Q69. Elementos do agregado familiar:
- (1)
- (2)
- (3)
- (4)
- (5)
- ou mais (6)

End of Block: Consumidor

A sua resposta foi registada. Muito obrigada pela sua participação neste questionário.

Appendix B: Data Analysis

Customer Journey Phase | Before the Purchase

Q1: How often do you search for products online before making a purchase?

Table 1. Q1 Response Frequency Table

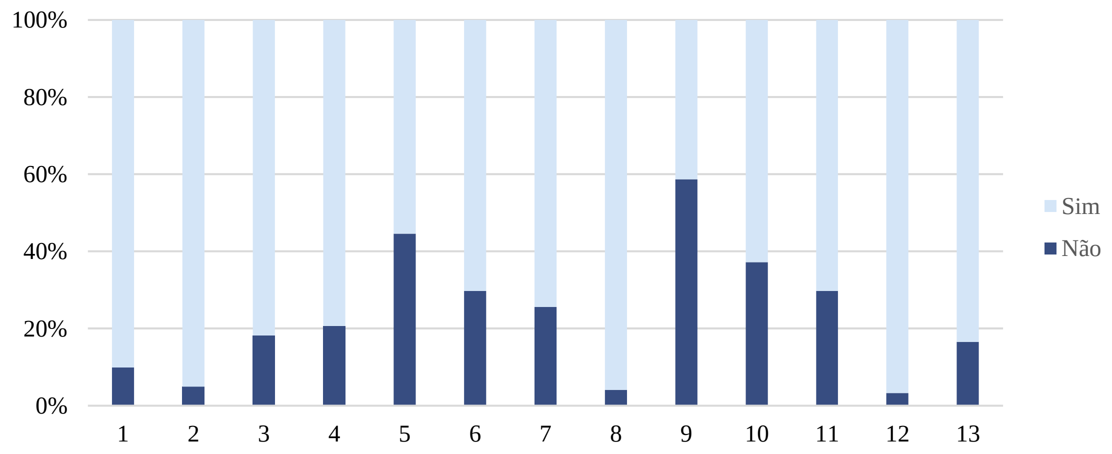
Q1	Frequency	Percentage
Most of the time	49	40.50
Never	1	0.82
Rarely	7	5.79
Always	64	52.89

Q2: How often do you search for products in a physical store before making a purchase?

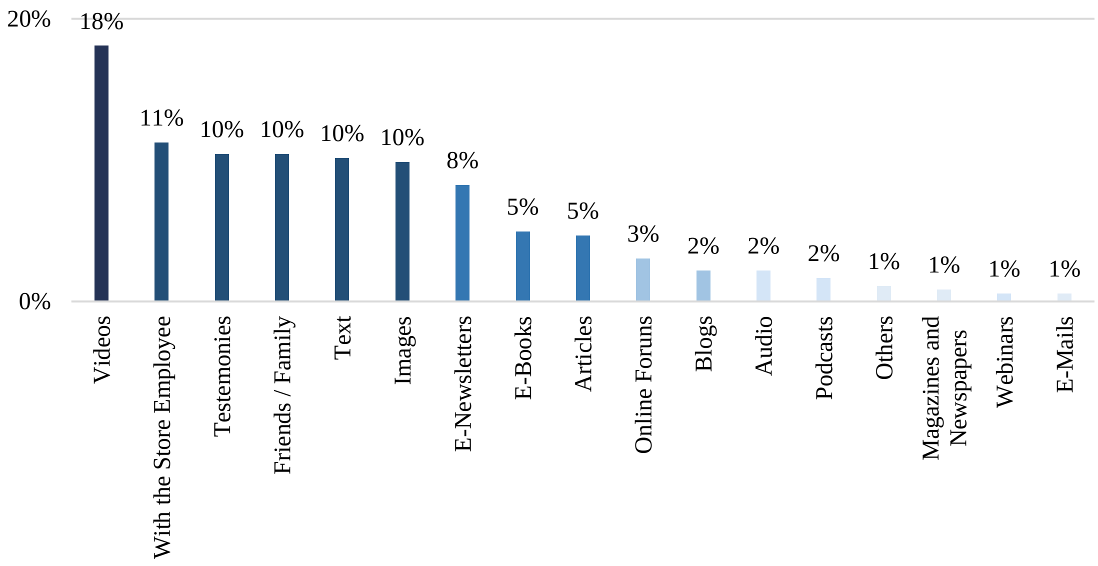
Table 2. Q2 Response Frequency Table

Q2	Frequency	Percentage
Most of the time	36	29.75
Never	20	16.52
Rarely	54	44.62
Always	11	9.11

The percentage of responses obtained in Q4 is shown in the chart below:



Q8: What kind of format do you prefer to get this information about the product you want to buy? Select up to three options.



In the *other* category, four participants mentioned the following variables: Comparative Summary Table, Television, Product Reviews on the site and Deco Studies.

Customer Journey Phase | Purchase

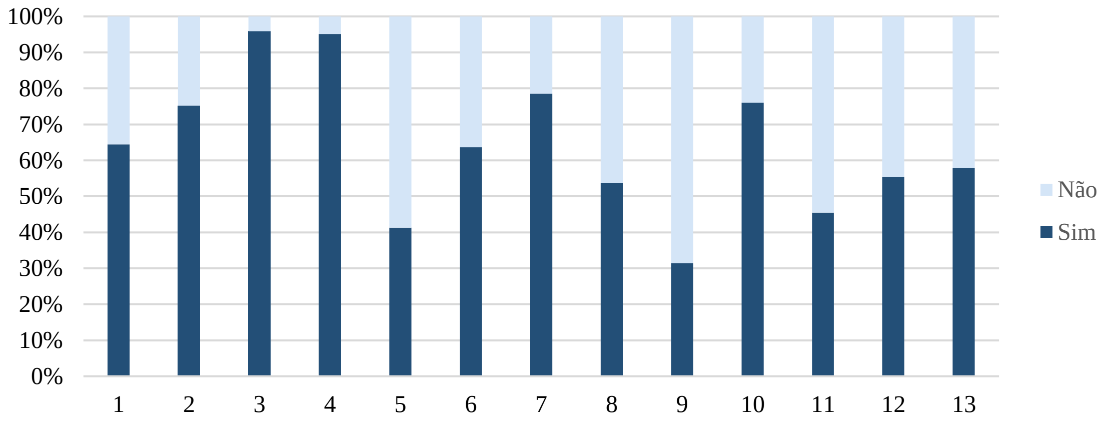
Q39: How often do you buy this type of products online (laundry machines, dishwashers, stoves, refrigerators)?

Q39	Frequency	Percentage
Weekly	1	0.83
Monthly	0	0
Quarterly	2	1.65
2/3 x per year	2	1.65
Annually	10	8.26
From 2 to 2 years	59	48.76
I don't buy online	47	38.84

Q42: Mark "Yes" or "No" about the statements below (about products in the "large home appliances" category).

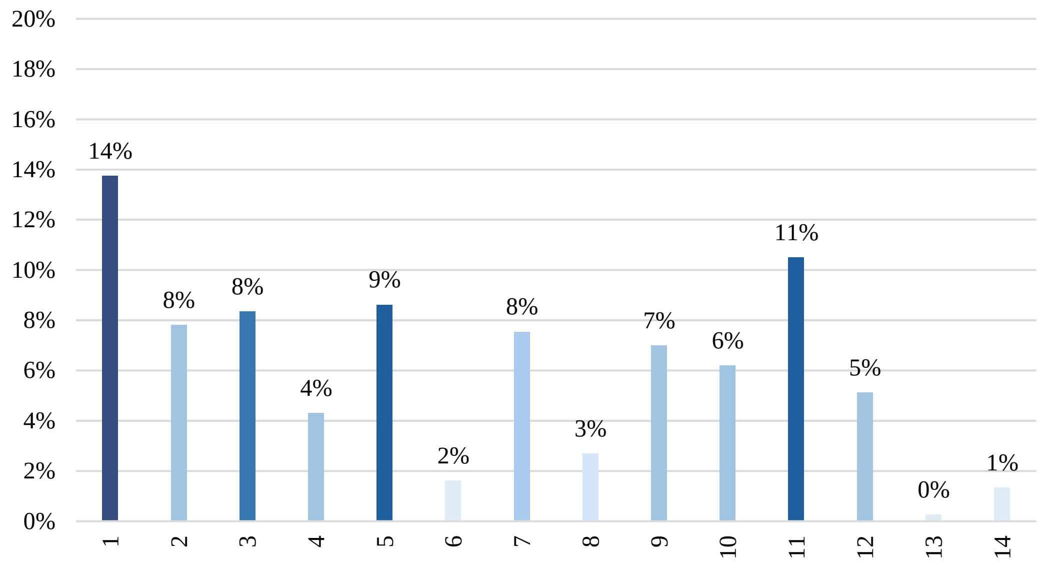
1. Technical information and descriptions of online products are sufficient to buy online.
2. Making the purchase online is more convenient.
3. The more product information the site provides me with, the safer (a) I feel to buy online.
4. Online categorization of products makes it easy to analyze the purchase.
5. Online customer service is better than in-store customer service.
6. I use the online platform more as a catalog of products, I prefer to buy in the physical store.
7. I use my phone when I'm in the physical store.

8. I only buy online from brands I'm already familiar with.
9. I only buy in physical stores of brands with which I am already familiar.
10. When I'm in the store, interaction with the seller makes it easier for me to make a decision.
11. The place in store where the items are on display influences my decision-making.
12. I usually join loyalty programs or membership cards to enjoy benefits at the time of purchase.
13. Product design (packaging) influences my decision making.
14. Reviews/reviews from other customers influence my purchasing decision.



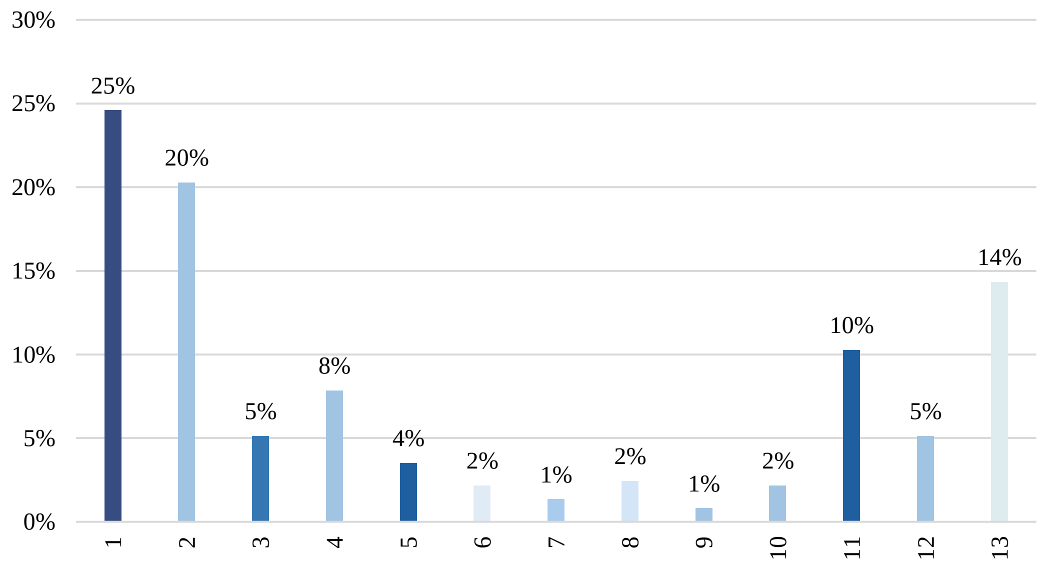
Q43: What are the most important reasons to make the purchase on an online platform? Select up to three options.

1. How products are catalogued and organized
2. Content (images, photos, texts, sounds, music)
3. Simple, organized and fluid navigation
4. Accessibility for consultation on any device (mobile phone, tablet...)
5. Variety of offer of available products
6. Customer service (chat for questions)
7. Access to products that do not always exist in physical stores
8. Early access to news and releases
9. Increased visibility into campaigns, discounts and promotions
10. Detailed description and technical product information
11. Reviews /reviews of other customers
12. Exclusive online campaigns
13. Other (Convenience)
14. I Don't Buy Online



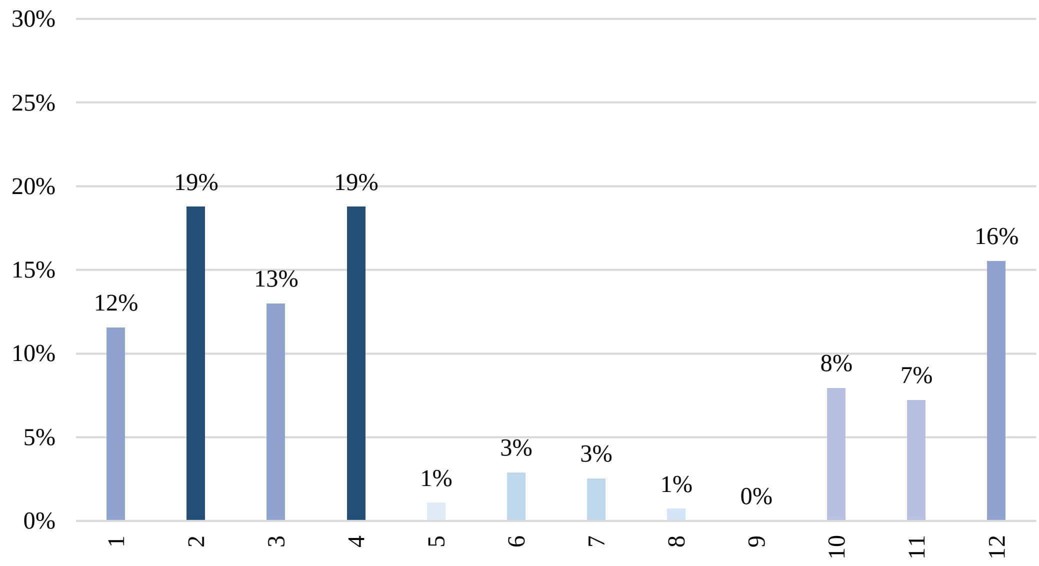
Q45: From the categories below, select the ones you prefer to buy directly from the physical store.

1. Large appliances (laundry machines, dishwashers, stoves, refrigerators, air conditioning products)
2. Small appliances (microwaves, mini ovens, vacuum cleaners, food preparation products)
3. Beauty, fashion, health and baby products
4. TV, video and sound
5. Mobile phones and TV packages
6. Computers and Accessories
7. Gaming, Games and Toys
8. Books, Music and Movies
9. Tickets
10. Photography, Video and Drones
11. Office and Stationery
12. Home and Decoration
13. Bricolage, Garden and Animal Products



Q46: What do you value most in the physical store shopping experience? Select up to three options.

1. Visual Merchandising (visual communication around the exhibition and products)
2. Comparison between products of different brands
3. Variety of offer of available products
4. Customer service with the assistance of sellers
5. Exclusive offline campaigns
6. Store location
7. Increased visibility into campaigns, discounts and promotions
8. Physical attributes of the store (lighting, aisles, store layout...)
9. Payment Mode
10. Take the product with you at the time you pay for it
11. Agile possibility of exchange or return
12. View, touch and feel the product (size, texture, color)



Q49: How likely is it to buy a product online after you've seen it in a physical store?

Q49	Frequency	Percentage
Never	4	3.31
Rarely	36	29.75
Most of the Time	55	45.46
Always	26	21.49

Q50: How often do you buy a product online after you have seen it in a physical store?

Q50	Frequency	Percentage
Never	2	1.65
Rarely	45	37.19
Most of the time	53	43.80
Always	21	17.36

Customer Journey Phase | Post-Purchase

Q58: Mark "Yes" or "No" about the statements below (about products in the "large home appliances" category).

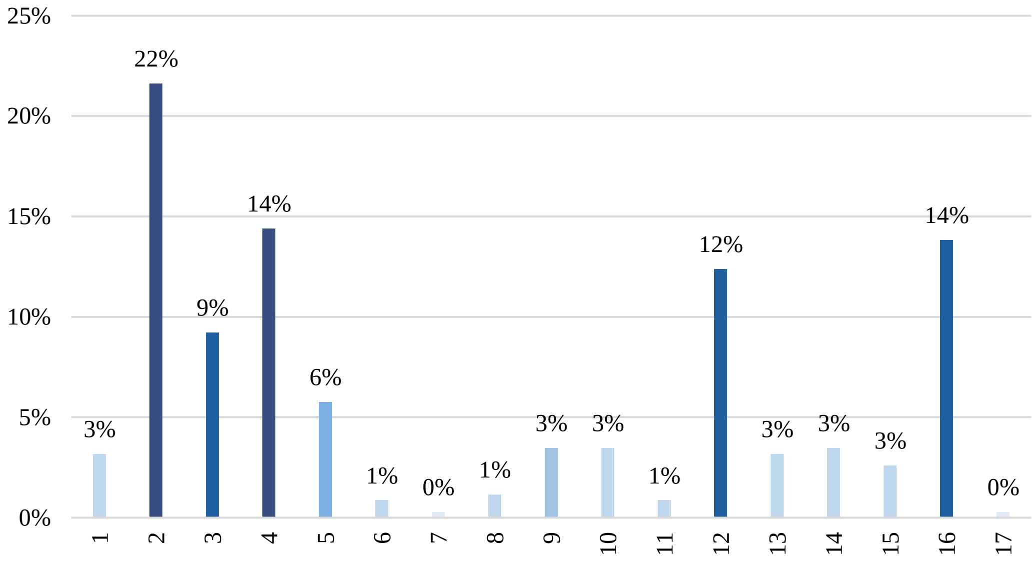
Table 12. Q58 Response Relative Frequency Table (Percent)

Q58	Yes	No
I often share my shopping experience on an online platform	47.93	52.07
I often make recommendations to my friends and/or family about the products I buy.	90.08	9.92
I often write reviews on the brand's websites about my experience.	42.98	57.02
I usually interact with the brand on social networks after the purchase I made.	39.67	60.33

Q60: In what type of format do you prefer to consume this information after purchasing the product? Select up to three options.

1. Blogs
2. E-books
3. Text
4. Videos
5. Images
6. Podcasts
7. Audio
8. Webinários
9. Articles

10. With the developer in store
11. Magazines and Newspapers
12. E-Newsletters
13. Testimonies
14. Discussion Forums
15. Friends/Family
16. Emails
17. Other:



Appendix C: Top 10 Retailers Of Top250 Deloitte 2022

Global Powers of Retailing Top 250, FY2020

FY2020 retail revenue rank	Change in rank from FY2019[3]	Name of company	Country of origin	FY2020 retail revenue (US$M)	FY2020 parent company/ group revenue (US$M)	Dominant operational format	# countries of operation	FY2015-2020 retail revenue CAGR[2]	FY2020 retail revenue growth	FY2020 Net profit margin[1]
1	0	Walmart Inc	United States	559,151	559,151	Hypermarket/ supercenter	26	3.0%	6.7%	2.5%
2	0	Amazon.com, Inc.	United States	213,573	386,064	Non-store	21	21.9%	34.8%	5.5%
3	0	Costco Wholesale Corporation	United States	166,761	166,761	Cash & carry/ warehouse club	12	7.5%	9.2%	2.4%
4	0	Schwarz Group	Germany	144,254	145,064	Discount store	33	7.8%	10.0%	n/a
5	2	The Home Depot, Inc.	United States	132,110	132,110	Home improvement	3	8.3%	19.9%	9.7%
6	-1	The Kroger Co.	United States	131,620	132,498	Supermarket	1	3.7%	8.3%	2.0%
7	-1	Walgreens Boots Alliance, Inc.	United States	117,705	139,537	Drug store/ pharmacy	9	5.6%	1.5%	0.3%
8	0	Aldi Einkauf GmbH & Co. oHG and Aldi International Services GmbH & Co. oHG	Germany	117,047 *	117,047 *	Discount store	19	5.8%	8.1%	n/a
9	4	JD.com, Inc	China	94,423	108,028 **	Non-store	1	31.2%	27.6%	6.6%
10	1	Target Corporation	United States	92,400	93,561	Discount department store	1	4.6%	19.8%	4.7%