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Conceptualizing a path-to-purchase framework and exploring its role in shopper segmentation

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Abstract

Purpose – The purpose of this paper is to explore a conceptualization of shopper as behaviourally distinct from consumer. The authors seek to identify elements foundational to shopper behaviour, using insights from the extant literature. A path-to-purchase framework is proposed, and tested. The framework is further explored as a method for improving shopper segmentation.

Design/methodology/approach – Over 308 articles associated with the shopper are examined using a bibliometric methodology. The literature review provides the foundation for a path-to-purchase (PtP) framework. An experimental design online study is undertaken to validate the framework. Structural equation modelling is used to analyse the data. Moderation testing of importance in the model is explored.

Findings – The findings reveal five stages through which shoppers' progress in pursuit of purchase resolution. The exploratory study reveals the positive influence of each stage one on another. Additionally, shopper perception of the importance of the recipient and the occasion moderate relationships associated with purchase outcomes.

Research limitations/implications – The research may be limited by the selection of literature assembled from over 60 years of research, and the online methodology.

Practical implications – The framework is suited for both industry and academia to better address shopper needs. The framework is specific to shopper behaviour relieving some of the conflicting messages which result from the overlay of consumer behaviour on a shopper. The framework describes the processes in purchase pursuit allowing brands and retailers to better support the shopper. Importance as a moderator is explored allowing for new and perhaps better ways to segment shoppers.

Originality/value – This theory building research provides a comprehensive exploration of the shopping literature to propose a PtP framework. The framework provides academicians and practitioners a more detailed method for examining and segmenting shoppers. Through the framework elements specific with each stage can be examined for their suitability as better segmentation tools for brands and retailers to deliver enhanced shopper satisfaction.

Keywords Framework, Behaviour, Segmentation, Bibliometric, Path-to-purchase, Shopper

Paper type Research paper



1. Introduction

Individuals actively engaged in making a purchase begin down a “path-to-purchase” (PtP), a decision making process to solve an occasion-specific purchase need (Shankar *et al.*, 2011). This active engagement shifts an individual's orientation from consumer to shopper (hereinafter referred to as “shopper mode”). “Shoppers” (individuals engaged in shopper mode) are likely behaviourally distinct from individuals engaged in one or more stages of the classic consumption process (Engel *et al.*, 1968). Recent research

indicates that when shopper mode is engaged, assessments of items which may solve the purchase need, alter significantly. As a result, a shopper's final purchase decision is often markedly different from decisions made whilst engaged in other stages of the traditional consumption process (Bell *et al.*, 2010). Both the shopper mode and PtP processes are particularly different from pre- and post-purchase consumer behaviour (Levy and Weitz, 2007) and therefore, consideration of these differences are important to both scholars and practitioners. Thus, this paper addresses "shopper", as conceptually distinct from the traditional conceptualization of "consumer". Following a review of the extant literature regarding shoppers, we provide a clear conceptual definition of shopper, allowing for clear delineation *vis-à-vis* consumers.

The rapid and continued growth in shopper marketing (Mahoney, 2010) requires precise communication strategies to drive performance. However, the limited understanding of the behavioural differences between consumer and shopper require that both academicians and marketers focus on the shopper to better define those differences. Leading textbooks note that research into shopper marketing has been neglected in favour of traditional consumer marketing (Kotler, 2012). Kotler (2012, p. viii) further states "We need a better understanding of how the buying decisions of the person shopping, or shopper, can be triggered, affected and disrupted". We posit that shopper engagement of the PtP delivers purchase outcomes so dramatically different from the traditional consumer paradigm (Shankar *et al.*, 2011), that purchase behaviour can no longer be predicted using traditional consumer frameworks. For this reason, we propose a PtP framework through which the shopper is better examined.

This is not to say that industry and some limited recent academic literature has left the PtP unexplored. Nor is it to say that this is the first framework to be developed. Top shopper marketing firms such as Catapult, MARS, TracyLocke, and ARC Worldwide (Flint, 2014) each utilize a unique method to describe the shopper experience. Many leading shopper marketing firms, absent a theoretical foundation, developed their own PtP frameworks in a variety of configurations (Hartman Group, 2012; Galante *et al.*, 2014; Danubio and Hassen, 2015). Even the Path to Purchase Institute describes its own framework utilizing a funnel approach (Breen *et al.*, 2014), which has also been disputed by others in the field (Frost, 2015). These varying approaches make segmentation of shoppers difficult and unreliable, becoming a cause for discussion and dissent. Therefore conceptualizing a framework allowing for more reliable segmentation would add great value, and provide a uniform PtP for academic and practitioner use (Needel, 2015). Needel (2015) calls for stability in PtP research, imploring industry and academy members to develop a testable model. The goal of this research is to propose a PtP framework and provide a first test of its functionality.

The lack of cohesion within and between practitioner and academic groups, highlights the need for a theoretically grounded shopper segmentation tool, and testable PtP framework. Therefore, a rigorous review of the shopper literature is undertaken to provide insight into the processes shoppers engage, leading to changes in behaviour based on occasion and end-user (i.e. self-purchase or for another).

2. Literature review methodology

To facilitate the development of the framework, the academic literature is explored for salient behaviours identified as specific to shoppers. The comprehensive literature review begins with the introduction of the shopper to the literature and the following 60+ years of research. The aim is to provide a theoretically grounded

understanding of the shopper and his/her unique behaviour, by connecting the fragmented and little-used literature.

Since Stone (1954), “shopper” has been nearly synonymous with “consumer”. However, research acknowledging differences between shoppers and consumers can be found as early as Alderson (1957). The breadth of the extant literature requires careful examination to identify shopper attributes distinct from consumer, which may be the source of the unique behavioural outcomes when purchasing. In order to identify salient relationships through such a large volume of literature, we employ a bibliometric methodology, which is designed to uncover subject matter relationships (Findlay and Sparks, 2002).

Fundamentally, bibliometric analyses allow subject matter examination independent of the author(s), revealing more detail about subject structure (Garfield and Merton, 1979). Citation analyses are a type of bibliometric method, and are well suited for examining the timing associated with the development of a topic. This form of analysis, through the examination of cross-citations helps to illuminate which journals are instrumental in the development of a subject area (Matthews, 1993). To generate the population of journals from which to select articles included in the analysis, we searched using the terms buyer and shopper in Google Scholar and EBSCO Business Source Complete. Expressly intent on review of shopper literature, consumer was not examined. The review of the literature associated with buyer yielded little to know additional information and as a result, only articles using the term shopper were included in the final analysis.

With the scope of the research defined, we then further limited the list to scholarly and government publications, resulting in an initial 308 articles for review. We deliberately excluded practitioner articles due to the high levels of conflicting messages and lack of theoretical support, as previously noted. We examine the remaining articles for how “shopper” appears in the research. This examination resulted in a further removal of 103 articles. Reasons for removal included the use of “shopper” as a surrogate for “consumer”, alternative usages (e.g. secret shopper), etc. Table I provides the foundational list of 205 articles, from 38 journals, over 60+ years and serving as our citation base.

The literature is organized into distinct sub-categories (see Table II), using a *post hoc* method (Werner, 2002; Runyan and Droge, 2008). This method generates categories based on article content, serving as an organizational tool. Segmentation is by far the largest and most enduring sub-category, comprising 92 entries, or nearly 50 per cent of all literature on the shopper. This volume of literature in a single category is reflective of the priority marketing places on segmentation. However, it also reveals the unsatisfactory performance of static segmentation models. The proliferation of and often conflicting research on segmentation in the shopper literature would tend to indicate that the reliance on traditional consumer methods for segmentation become less stable and reliable when utilized with shoppers. As a result of the concentration in segmentation research, researchers generated only 113 articles examining other aspects of the shopper which were spread across the 60+ years since Stone (1954) first introduced shopper into the literature.

The cross-citation among journals examining shoppers depicted in the bottom half of Table I, reveal a concentration (more than 50 per cent) of articles published in four retail-focused journals (*International Journal of Retail and Distribution Management*, *International Review of Retail, Distribution and Consumer Research*, *Journal of Retailing*, and *Journal of Retail and Consumer Services*). The intense scrutiny of the in-store environment in the literature represents a further constraint on shopper research.

Journal/ author	Date	AJS	JM	HBR	JMR	JR	JAR	JSBM	IRRDOR	JRDM	JRCS	JCR	JBR	JAMS	P&M	JMTP	JCM	Other ^a	Cited listed journals	Total article citations	% of listed journal cites to total cites	
Originating journal																						
article no's																						
Publication	22		5	6	22	5	1967-1972	1980-2001	13	12	10	44	13	4	3	10	3	38	100	205	100	
dates	1958-2011			2012	2012	2001	1985-2003	2005-2011	1993-2012	1991-2011	1995-2012	1974-2012	1995-2012	1985-2007	2003-2012	1997-2011	1999-2011					
A/S (Stone)	1954	4		4	4	4			11	12	5	3	10	11	3				73	520	14	
JM (Bliss)	1960																		0	4	0	
HBR (Rich and Portis)	1963			4						1			1	1					7	16	44	
JM (Herrmann and Beik)	1968			4	1	1			9	5	5	1	4	8					38	122	31	
JMR (Darden and Reynolds)	1971			3	4	1			9	6	9	2	13	5	3				55	234	24	
JR (Jolson and Spath)	1973			1	1				1	1	2	2	2	2					9	31	29	
JM (Boone et al.)	1974								2	2	4		4	2	1				1	19	5	
JM (Gillett)	1976								2	2	4		4	2	1				15	106	14	
JR (Berkowitz et al.)	1979								3	2	4	1	5	2	2				19	138	14	
JAR (Hirschman and Mills)	1980			1															1	8	13	
JSBM (Barnes)	1984								11										11	13	85	

(continued)

Table I.
Bibliometric analysis
and cross-citation
index

Table I.

Journal/ author	Date	AJS	JM	HBR	JMR	JR	JAR	JSEM	IRRD	IRRD	JRCS	JCR	JBR	JAMS	P&M	JMTP	JCM	Other ^a	Cited listed journals	Total article citations	% of listed journal cites to total cites
JR (Westbrook and Black)	1985		1			14			24	15	26	1	16	5	6				108	563	19
Total count		4	18	0	11	20	0	0	70	45	53	10	55	36	15	0	0	0	337	1,774	19
Per cent of Contribution		1	5	0	3	6	0	0	21	13	16	3	16	11	4	0	0	0	19		

Notes: ^aOther represents multiple journals each of which contributed two or less articles. The list of those journals is available upon request from the corresponding author. The initials refer to the following journals: AJS, *American Journal of Sociology*; JM, *Journal of Marketing*; HBR, *Harvard Business Review*; JMR, *Journal of Marketing Research*; JR, *Journal of Retailing*; JAR, *Journal of Advertising Research*; IRRD, *International Review of Retail, Distribution and Consumer Research*; IJRDM, *International Journal of Retail, Distribution Management*; JRCS, *Journal of Retailing and Consumer Services*; JCR, *Journal of Consumer Research*; JAMS, *Journal of the Academy of Marketing Science*; P&M, *Psychology and Marketing*. The numbers within the chart represent citations for the listed article found in the referenced journal. The row totals represent the listed journal citation totals, followed by the total number of citations for each article, and the percentage that the listed journals represent to the total number of citations. The column totals, represent total number of listed article citations found in that journal. The percentage represents that journals citations as a per cent of the total number of listed journal citations. The journals referenced by the initials at the top of the table represent the journals who have published the highest number of shopper articles. Bibliometric analysis results, identifying the major sources of shopper literature by journal 1954-2012. Journals arranged by number of articles appearing in the journal with the associated date range

Category	No. of articles	Sample article	Path-to-purchase framework	
Shopper segmentation	92	Darian, Jean C. (1987). "In-home shopping: are there consumer segments?" <i>Journal of Retailing</i>	781	
Purchase involvement	26	Dickson, Peter R. and Alan, G. Sawyer (1990) "The price knowledge and search of supermarket shoppers". <i>The Journal of Marketing</i>		
Location salience	7	Kang, Yoon-Soon, Paul M. Herr, and Christine M. Page (2003). "Time and distance: asymmetries in consumer trip knowledge and judgments". <i>Journal of Consumer Research</i>		
Retailer salience	7	Baltas, G. and Papastathopoulou, P. (2003). "Shopper characteristics, product and store choice criteria: a survey in the Greek grocery sector". <i>International Journal of Retail & Distribution Management</i>		
Cultural influence	2	Lee, Julie Anne, and Jacqueline J. Kacen (2008). "Cultural influences on consumer satisfaction with impulse and planned purchase decisions". <i>Journal of Business Research</i>		
In-store elements	17	Inman, J. Jeffrey, Russell S. Winer, and Rosellina Ferraro (2009). "The interplay among category characteristics, customer characteristics, and customer activities on in-store decision making". <i>Journal of Marketing</i>		
Demographics and psychographics	11	Louro, Maria J. Rik Pieters, and Marcel Zeelenberg, (2005). "Negative returns on positive emotions: the influence of pride and self-regulatory goals on repurchase decisions". <i>Journal of Consumer Research</i>		
Shopper motivation	43	Zhang, Xiaoni, Victor R. Prybutok, and David Strutton (2007) "Modeling influences on impulse purchasing behaviors during online marketing transactions". <i>The Journal of Marketing Theory and Practice</i>		
Note: Analysis of selected articles according to research foci, and representative article citation				Table II. Shopper sub-category representation in the literature

The concentration of shopper literature on segmentation and in-store environments underscores the need for framework development outlining the complex processes through which the shopper passes along the PtP. This is particularly true in light of research indicating the PtP begins well in advance of engagement with the shopping environment (Flint *et al.*, 2014).

3. Shopper literature, framework development, and hypotheses

Stone (1954) notes that interactions with sales-associates is unique to shoppers, and may have a significant impact, and identifies the first element which may generate a unique shopper. Bliss (1960) highlights actions and environments as differential, and is the first to note that active engagement in purchase acquisition drives the differences between shopper and consumer behaviour at retail. Specifics associated with the purchase need cause, product/service required to satisfy that need, and location to execute the purchase, are all clearly defined by the shopper, as opposed to consumers who are shown as information seeking about future acquisition targets (Gardial *et al.*, 1993). Each occasion initiating a PtP, therefore provides parameters which frame potential purchase solutions (Lewin, 1936; Sorrentino *et al.*, 1988). For the shopper, we label this first stage as "occasion-driven need recognition", in effect the first stage in the shopper's PtP.

3.1 Occasion-driven need recognition (ODNR)

In general, consumer research defines “occasion” as noise to be filtered out of the data (Belk, 1975). However, specificity associated with the occasion generating the product/service need is a necessity for shoppers faced with task completion. The occasion provides shoppers with parameters to better define the purchase need shifting away from their consumer pre-dispositions (Desarbo and Choi, 1998). The occasion initiates shopper mode beginning the PtP and helps shape purchase solutions acceptable for the occasion. Components of ODNR include: situational elements (Belk, 1975; Jung Chang *et al.*, 2014), importance assessments associated with the occasion, purchase recipient (the shopper or other), and the product/service.

Multiple temporal dimensions affect the shopper: time to complete or terminate a current event, time between current and subsequent events, proximity to the next need occasion, time to gather missing information, and time required to purchase the product (Harvey, 1999; Reimers, 2014). In this way, all shoppers are constrained by time as so many other events are competing for that finite amount of time (Jones *et al.*, 2015). Therefore, all shoppers are “convenience” shoppers, as they seek to maximize shopping time against all other competing time demands (Jones *et al.*, 2015). Social situations introduce valance, altering the PtP (Gilbert *et al.*, 2002; Russo Spena *et al.*, 2012). Positive valance may encourage shoppers to meet or exceed purchase goals, while negative valance may lead to delay or shopping task completion failure (Gardner, 1985; Long and Averill, 2003). Similarly, a shopper’s importance perception of the occasion, recipient, and/or product/service introduces anxiety (Schlenker and Leary, 1982). Mixed assessments of (e.g. occasion as unimportant; recipient important; and vice versa) may generate internal conflict negatively influencing shopping performance (Wooten, 2000). Once shoppers evaluate ODNR, they generate a “perceptual map” of the occasion.

3.2 Perceptual mapping of the occasion (PMO)

Industry considers the “PtP” initiated when a shopper recognizes: a specific need, fulfilment-time constraints, trip value (e.g. hedonic/utilitarian) and intervening steps (e.g. research, evaluation, trip type, channel selection) (Mccollough *et al.*, 2000). The majority of the literature considers shoppers as fixed into segments, utilizing typical consumer indicators (e.g. socio-economic, demographic, psychographic, and lifestyle) (Stone, 1954; Brun *et al.*, 2013). A more nuanced approach explored by Westbrook and Black (1985), introduces segmentation by motivation allowing the shopper to adapt to the occasion. Further, the cultural influences associated with each occasion are subject to change (Overby *et al.*, 2005) requiring shoppers be responsive, not static, while pursuing purchases (Boles *et al.*, 2003).

During PMO shoppers map perceptions associated with: the product/service required, motivation (to complete the purchase), role (in the occasion), role, and product/service subjective norms. Shopping engagement requires a shopper have some level of motivations towards purchase task completion, which can be influenced by: context or trip type, channel selection (e.g. in-store, online, catalogue, etc.). The most common trip types (e.g. quick trip, stock-up, convenience, and fill-in) are examined for their appropriateness given the purchase required and largely reflect the degree of effort the shopper will need to expend in trip preparation (Walters and Jamil, 2003; Karande and Merchant, 2012).

Competing interests impact shopper motivation, examples would include; internal desires, competing occasions, other influence (those shopping with and/or not but providing input), other social obligations, as well as constraints associated with time,

money, and effort (Prus, 1993; Bicen and Madhavaram, 2013; Jones *et al.*, 2015). Role (e.g. mother, friend, co-worker) also influences motivation regardless of the source of the purchase need (i.e. for self or another). Further, shoppers often bundle a variety of purchases in a single trip, resulting in adoption of a variety of roles during a single shopping experience (Shankar *et al.*, 2011). This demonstrates the tremendous influence role yields in defining the purchase solution.

Subjective norms and perceived social pressures associated with engagement in a particular behaviour (Fishbein and Ajzen, 1975), also influence shopper motivation. Subjective norms may influence shopper occasion role, and product/service perceptions as well. Building on this literature, we offer the following hypotheses:

- H1. Shopper conceptualization of the role in the occasion will have a positive impact on the perception the occasion.
- H2. Shopper conceptualization of the subjective norms associated with the occasion will have a positive impact on the perception the occasion.

These solutions sets are utilized in “purchase solution targeting (PST)”.

3.3 Purchase Solution Targeting (PST)

Unique to a shopper’s PtP is retailer salience (Jolson and Spath, 1973). Consumers’ with no defined purchase need have little use for retailer selection. The shopping environment regardless of channel, is central to a shopper’s PtP. Tasked with acquiring a specific product/service requires significant focus on the “who” and “how” to complete the purchase (Flint *et al.*, 2014). Consumers alternatively are focused on “what” (Woodruff and Gardial, 1996). Regardless of “where” the shopper makes the purchase, the selection is found in the third stage of the framework as “purchase solution targeting”.

In PST, potential solutions are evaluated for appropriateness and likelihood for purchase completion. The additional likelihood assessment is again unique to the PtP. Individuals in shopper mode must examine details associated with every potential solution including specific brand(s), product(s), retailer(s) and store location(s)/channel(s), hedonic and utilitarian value. Each of the preceding are evaluated alone and in combination, for their potential in purchase resolution success. Viable options must meet minimum levels of acceptability for the occasion, performance, affect, cognition, culture, (Bandura, 2002), and likelihood of attainment. Once an item(s) meets these thresholds, it can be placed in a potential solution set (Bettman *et al.*, 1998; Bandura, 2002). Complementary products (Mai *et al.*, 2011) and non-retail solutions (e.g. rental, borrowing, manufacturing, etc.) which could also satisfy the need occasion, are also identified and similarly evaluated (Knox and Eliashberg, 2009). Building on this literature, we offer the following hypotheses:

- H3. Shopper perception of the occasion will have a positive impact on the choice of:
(a) location; (b) retailer; (c) brand; (d) product.

Perceived importance in consumer behaviour has been widely researched (Petty *et al.*, 1983; Celsi and Olson, 1988; Brun *et al.*, 2015). Occasion elements are not viewed equally, impacting importance assessments differentially. This variation in assessments form the foundation for utilizing importance assessments as a segmentation tool for shoppers within the framework. Shopper personal needs, wants, desires, and values form the understanding of the need occasion. Importance

influences occasion certainty for the shopper, driving effort and anxiety towards successful completion of the shopping task. Perceived importance in this research has two orientations: occasion and recipient. Perceived importance impacts the shopper's beliefs, attitudes, and intentions towards fulfilling her purchase (Goldstein, 1990). Estimation of importance may vary even if the assessment attributes are the same depending on the shopper's goals (Goldstein, 1990).

Occasion and recipient are distinct constructs, yet importance wields the same effect. Importance adds anxiety which increases proportionately as perceived importance increases (Schlenker and Leary, 1982). Occasion importance affects the social environment raising anxiety associated with role performance (Wooten, 2000) and raises normative pressures. In this way specifics associated with the purchase solution such as, the brand and/or product, become increasingly important for the shopper to manage correctly. Recipient importance impacts interpersonal relationships and increases stress between the shopper and recipient (Wooten, 2000), which further impact belief assessments associated with the purchase solution. This manifests itself primarily in the highly personal choice selections associated with the purchase, primarily the retailer and final product selected. Building on this literature, we offer the following hypotheses:

H4. As shopper assessment of importance of the recipient consumer identified in the occasion increases, the relationship between perception of occasion and: (a) retailer will increase; (b) product will increase.

H5. As shopper assessment of importance associated with the occasion increases, the relationship between perception of occasion and: (a) brand will increase; (b) product will increase.

With the solution identified, the shopper engages the shopping experience, which represents "purchase solution resolution (PSR)".

3.4 Purchase Solution Resolution (PSR)

Even with a solution identified, alterations introduced during the shopping experience can alter purchase outcomes (Kerin *et al.*, 1992; Borges *et al.*, 2013). The shopping experience encompasses all retailer and supplier actions designed to develop favourable shopper impressions with atmosphere cues such as, environment, service, product, and display (Hultén, 2012; Ballantine *et al.*, 2015). Some elements impact the shopper in advance of the retail environment including traffic (Schmocker *et al.*, 2006; Wiese *et al.*, 2015), parking availability, lot condition, and lighting (Voorhees *et al.*, 1955). All of the elements which can influence purchase outcomes for the shopper comprise a phase along the PtP we call PSR. The changing nature of the shopping environment underscores the need for a dynamic PtP framework. PSR, encompassing all the physical actions and interactions involved in completing the purchase, may dramatically influence shoppers and purchase outcomes (Bagdare and Jain, 2013). During shopping, shoppers encounter environmental manipulations designed to enhance the experience through offerings of services, products, and displays (Hultén, 2012; Ballantine *et al.*, 2015).

In-store atmospherics affect shopper experiences (Russo Spina *et al.*, 2012; Borges *et al.*, 2013) via hedonic or utilitarian perceptions (Mehrabian and Russell, 1974), associated with the shopper, product, and trip type (Kim *et al.*, 2007). Store atmospherics affect the shopping environment (Kim and Kim, 2012), influencing shopper mood (Swinyard, 1993).

Other shopping environments such as online (Jones and Runyan, 2013), television (Eastlick and Liu, 1997), and catalogue (Mathwick *et al.*, 2002) are also influenced by

atmospherics. Disruptions can distract shoppers (Xia and Sudharshan, 2002), including those from social interactions (e.g. salesperson, fellow shoppers, family, etc.), product placement, in-store events, mobile devices, internet service disruption, and media which may negatively impact shoppers (Xia and Sudharshan, 2002; Ong, 2006). Some disruptions, such as stock-outs, may force a complete re-evaluation of the shopping experience, and have a long-term negative impact on brand equity (Campo *et al.*, 2000; Sloot *et al.*, 2005). After shoppers have completed the shopping experience, they assess shopping performance through “shopping experience appraisal (SEA)”.

3.5 Shopper Experience Appraisal (SEA)

With the shopping experience complete, the shopper will assess his/her performance. The shopper will evaluate each of the individual benefits and consequences associated with the purchase outcome, relative to the need which initiated the shopping occasion (Bagdare and Jain, 2013). During the shopping experience alterations, either positive or negative may occur impacting purchase outcomes (Flint, 2006). These alterations influence the assessment process and the final element of the framework, SEA. During this phase, the entire process – from shopper mode initiation to purchase resolution – is evaluated for performance against the occasion parameters which initiated the shopping occasion.

For shoppers, appraisals are tied to PtP performance, which is further associated with choice-process satisfaction (Zhang and Fitzsimons, 1999). Individuals assess satisfaction based on the choices made given information known, and decision complexity (Zhang and Fitzsimons, 1999). Ultimately, satisfaction is appraised on how close to the optimal shopping experience the shopper came given the potential solutions considered (Dash *et al.*, 1976).

SEA also reflects the assessment of decisions made as a result of changes introduced during the shopping experience. These changes institute attribute evaluations (Blocker and Flint, 2007), assessed as either increasing or decreasing benefit based on the shoppers goal(s) (Flint, 2006). Therefore at the culmination of the shopping experience an overall assessment inclusive of acknowledgement, preparation, and shopping engagement (including brand, product, retailer, location/channel selections), is undertaken by the shopper (Figure 1).

Through an extensive analysis of the extant literature, we identified four distinct stages as unique to the shopper. These form the foundation for the PtP framework. When the shopper navigates these stages, purchase solutions will be identified which are different from what would be anticipated applying the traditional consumer process. ODNr demonstrates occasion as central to framing the purchase need. PMO highlights the importance of occasion perception in response to original need recognition. PST focuses on the identification of purchase solutions, including brands (Moschis *et al.*, 2011), products (Behe *et al.*, 2015), retailers (Jayasankara and Ramachandra, 2011), channel/location (Carpenter and Brosdahl, 2011), alternative solution and complementary items (Sinityn, 2012), and hedonic and utilitarian values (Borges *et al.*, 2013). PSR reflects the shopper engaging in purchase task completion. Finally, in SEA shopping experience performance is evaluated given the shopper’s stated need. Therefore, based on the literature, we define the shopper for use in this framework as follows:

Individuals participating in a particular part of the consumption process which requires active engagement in the pursuit of a targeted purchase solution for an identified occasion, which may or may not be for personal consumption.

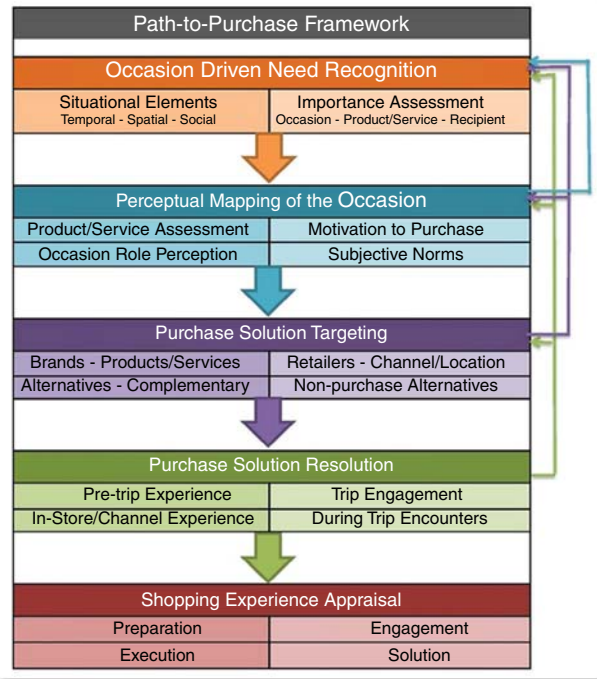


Figure 1.
Path-to-purchase
framework (PtP)

4. Research methodology for an initial examination of the PtP framework

The intent of this research was to devise a framework that would allow more rigorous testing to aid in shopper segmentation. Towards that end we devised a research study

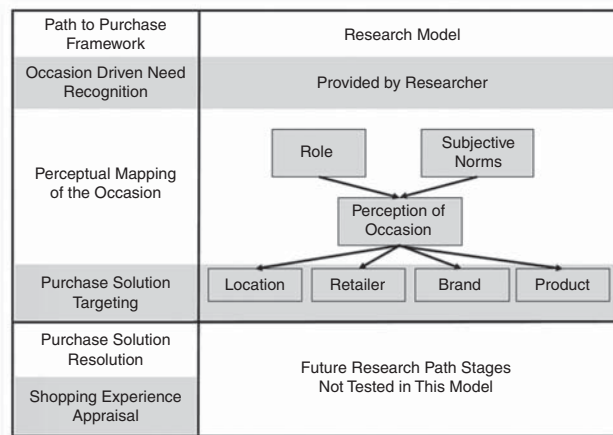


Figure 2.
Research model and
reference to path to
purchase stages

to test the framework. As seen in Figure 2, the study will examine the framework from recognition through targeting. While not explicitly examining the final purchase and assessment, the exploration through targeting has significant implications related to segmentation and framework functionality.

4.1 Survey design

In order to test the predictive elements of the model we created scenarios that provide details necessary to create a vivid occasion in the mind of the participants. We also stipulated the product category need (salty snacks) without any detail regarding individual product, brand or purchase channel information. The scenarios also varied the importance of the recipient and the occasion as either high or low. The survey was delivered using an online platform through a nationally based consumer panel. The survey presented the initial scenario, followed by the questions provided in randomised block to reduce order bias or priming (Dillman, 2007). Participants were pre-screened for shopping participation (within one week of survey), age, gender, ethnicity, and geographic location.

The survey instrument was comprised of existing scales adapted to the context. Role was measured using the organizational role scale (Rizzo *et al.*, 1970), subjective norms and perception occasion scales (Jones, 2012), and brand equity (Yoo *et al.*, 2000).

4.2 Results

The sample was comprised of 279 participants. Demographics characteristics of the sample include: 48.5 per cent male ranging in age from 18 to 55, with an average age 35; 54 per cent Caucasian; and average household income of approximately US\$49,500.

Scale reliabilities using Cronbach's α , all exceeded the recommended level ($\alpha > 0.700$) indicating sufficient reliability for each construct (Nunnally and Bernstein, 1994). Common method variance was examined using the common latent factor method (Podsakoff *et al.*, 2003). Manipulation checks associated with importance were examined using a question measuring importance as either unimportant or important.

The data were further explored using the two-step method of structural equation modelling (SEM). The measurement model was examined resulting in the following fit statistics: $\chi^2(352) = 1,046.738, p < 0.000; \chi^2/df \text{ ratio} = 2.794; CFI = 0.911; \text{ and } RMSEA = 0.078$, all of which are within acceptable ranges (Kline, 2010). Composite reliabilities range from 0.788 to 0.948, indicating adequate internal consistency (Nunnally and Bernstein, 1994). Average variance extracted ranged from 0.572 to 0.715, exceeding 0.50 for each factor (see Table III). This indicated variance greater than measurement error, establishing validity (Fornell and Larcker, 1981).

Factor	Composite reliability	1	2	3	4	5	6	7
Role	0.926	0.715						
Subjective norms	0.948	0.820	0.697					
Occasion perception	0.881	0.248	0.178	0.712				
Retailer	0.825	0.420	0.463	0.019	0.614			
Location	0.805	0.400	0.431	0.015	0.791	0.580		
Brand	0.856	0.488	0.540	0.027	0.810	0.773	0.664	
Product	0.788	0.532	0.563	0.040	0.718	0.784	0.778	0.572

Table III.
Composite reliability
and average
variance extracted

4.3 Hypothesis testing

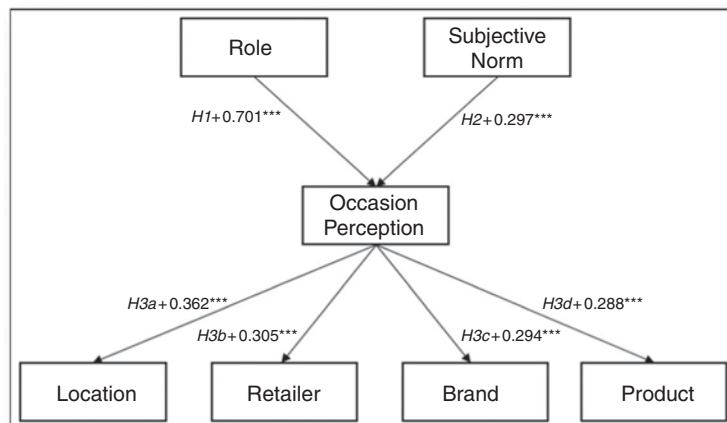
The second step in SEM is the structural model, which is fit for hypothesis testing. Again the model fit demonstrated statistics within the acceptable range: $\chi^2(24) = 24.051$, $p < 0.459$; Normed $\chi^2 = 1.002$; CFI = 0.997; and RMSEA = 0.002. (Kline, 2010). *H1-H3* are all accepted, as can be seen in Figure 3. These results indicate that given a specific occasion and need, shoppers will utilize the perception of their own role in the occasion and the subjective norms associated with the occasions to frame a perception of the occasion. Further, their perception of the occasion influences the combination of retailer, location/channel, brand, and product selected.

4.4 Moderation testing

Moderation is examined through the manipulation of importance associated with the recipient and the occasion to the shopper. The shopper was given information that would represent both those elements as either high or low. The perception of importance is provided as an element beyond the psychometric examination of role or occasion for the participant. We then explored the impact of the moderation on the hypothesized paths, depicted in Figures 4 and 5. The figures indicate that *H4a* and *H5b* are accepted while *H4b* and *H5a* are rejected. As a result of these findings we can see how the assessment of importance impacts the shopper's relationship to retailer and product.

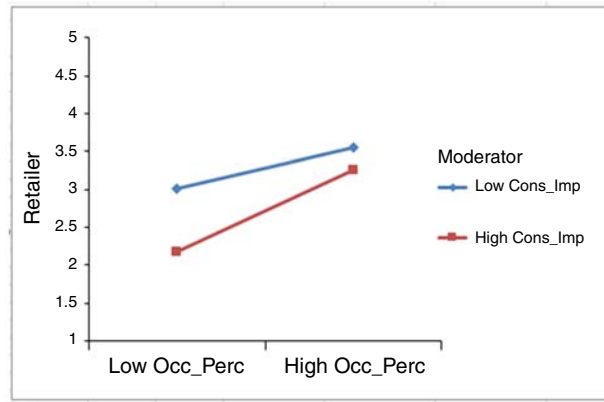
As shoppers assess higher importance on the recipient of the purchase the retailer gains in importance. This underscores the normative pressure felt by shoppers to purchase products or services from locations which the shopper believes are more acceptable than others. Therefore occasions inclusive of important recipients for the shopper drive a status-seeking behaviour. The status segment shopper is intent on providing benefit for the recipient through the purchase of products or services from specific retailers. The shopper will exert the necessary effort to satisfy this need as they can anticipate recognition for the effort from the recipient.

As shoppers assess higher importance on the occasion, product gains in importance. This underscores the normative pressure felt by the shopper to provide the occasion acceptable product. In this case the occasion is broader than an



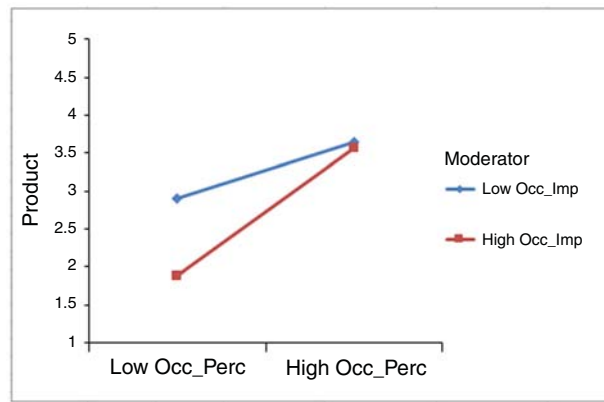
Note: *** $p < 0.001$

Figure 3. Research model results of hypothesis testing



Note: The influence of importance perception strengthens the relationship between the occasion perception and the retailer selection

Figure 4. Moderating influence of shopper perception of consumer (recipient) importance



Note: The influence of importance perception strengthens the relationship between the occasion perception and the product selection

Figure 5. Moderating influence of shopper perception of the importance of the occasion

individual therefore the more visible component of the desired product gains in importance over the less visible purchase location. These shoppers face higher social risk as the occasion is the source of the normative pressure. Therefore it is more than a single recipient who offers feedback. As the occasion is what is important to the shopper, meeting, or exceeding the requirements for the occasion become paramount. The “need to achieve” segment will focus on the product as the source of the acknowledgement for a job well done.

An important outcome of these findings is the shift in focus for segmentation of shoppers. In the case of recipient importance, the retailer gains in priority, while occasion importance drives product priority. We suggest that, given further study,

certain elements will drive brand salience while others will drive location/channel salience. Understanding how an occasion may drive shopper behaviour is a key element in being able to successfully segment shoppers by occasion.

5. Discussion and managerial implications

This study set out to provide insight into several gaps within the shopper literature by developing a theory based understanding of how the shopper navigates the PtP. Through an examination of over 60 years of literature a PtP framework is proposed including a definition of shopper appropriate for framework. Grounded in the shopper literature, the framework highlights substantial differences the shopper exhibits from the traditional consumer paradigm which supports the need for a theoretically based shopper behaviour framework. The PtP framework provides a substantial tool beneficial in the development of more productive shopper segmentation which has been difficult to develop owing to the complexity of the shopper. The PtP framework proposed is uniquely oriented towards specific shopper elements as opposed to consumer orientations, making for a more reliable foundation for shopper segmentation. Lastly, through an empirical examination, key elements of the framework are tested along with moderators which may be suited for shopper segmentation.

The PtP as proposed is developed through literature specific to the shopper. This is important as the shopper is distinct from consumers, yielding very different outcomes at the point of purchase. At the outset of the framework is ODNR which unlike need recognition found in the consumer literature, is anchored in a specific occasion. The purchase need recognized is tied to an individual within the context of an occasion which the purchase is for. This requires to shopper to assess beyond just the purchase need, many situational elements which are associated with that occasion. Need recognition by consumers requires none of these specifics. A consumer can recognize a need but absent the occasion there is little incentive to act. Fundamentally, the occasion acknowledged in the need is the element which instils the active engagement (shopper mode) which is outside of the consumer realm. It is also the key element through which the shopper begins their path which will ultimately lead to a purchase.

The second element, PMO is completely unique to the shopper. In the standard consumer paradigm need recognition is followed by information search about purchase solutions. However, for the shopper, who as often as not is purchasing for others and not themselves, solutions cannot be considered absent a clear understanding of the occasion. In PMO, the shopper frames the occasion in relation to themselves and the role they play in it, which again is distinctly different from a consumer. The consumer lacking any tie to an occasion is not required to assess their role in the purchase. Role for the shopper influences their motivation and understanding of normative pressures associated with the occasion and the item to be purchased. Finally, an assessment of the product/service is explored in light of these shopper perceptions. It is only after this examination that a shopper can begin to frame possible solutions.

The third element PST relates at some level to a combination of information search and evaluation found in the consumer model. However, unique to the shopper is the constant assessment of likelihood of successful purchase. Estimates of likelihood of purchase success are not part of the traditional consumer model. From the beginning the shopper is bound by the specifics of the occasion associated with the purchase need, which defines not only product/service purchase guidelines but also purchase completion deadlines. A consumer is not yet actively engaged in the purchase pursuit and therefor is not bound by any such deadline. Additionally, the consumer unlike the

shopper is not yet engaged in a purchase pursuit and is therefore unfettered from the burden to assess the financial and temporal impact of their purchase. The shopper is charged with completing a purchase, which requires during consideration of purchase solutions an examination of their time and funds availability with which to complete the purchase. Knowing that actual time and money will be spent dramatically alters how the shopper assesses solutions.

The fourth element PSR is wholly the purview of the shopper. The decisions provided in the consumer paradigm does not explore the nuance associated with the act of completing a shopping experience. The consumer may reach some conclusion regarding a targeted purchase but still absent active engagement, is not required to detail the where and when of the purchase. The shopper is physically engaged in the pursuit of a purchase and must develop a strategy which will help them succeed. Trips are often an assemblage of many purchase needs bundled together. Therefore, the shopper needs to assess what channel or location will best suit their purchase need. The shopper has also assessed the hedonic and or utilitarian nature of the trip and frames the channel and location decision towards that value. The shopper is keenly aware of the product which they seek to purchase from what brand, which is available at what retailer, through some specific location and/or channel. All of which has been uniquely framed to fit the shoppers goal given the occasion and the hedonic or utilitarian value associated with their purchase and shopping experience.

The fifth and final element of the framework again is unique to the shopper. The PtP framework and shopper mode end at the point of purchase. The shopper having recognized an occasion based need becomes actively engaged in a purchase solution and appraises their performance in the task upon the completion of the purchase. The consumer model however, continues with consumption and reflection, both of which are beyond the scope of the shopper. As noted, in many (if not most) cases the shopper is not the recipient, so consumption is not engaged and further may not be present during consumption, therefore for the shopper there is no foundation for consumption reflection. What is important for the shopper is to assess how well they performed in their task and how well suited their approach was for the occasion. This is what will be stored by the shopper to prepare them for the next time they are presented with a similar occasion and need. The use of shopping experience elements are unique to the shopper as opposed to consumption and reflection which are unique to the consumer. The purchase solution framed in the perspective of the shopper bound by the occasion, drives purchase outcomes to be significantly different than those often propose utilizing a consumer paradigm. Therefore, for those reasons it is essential to examine a shopper through a shopper specific framework like the PtP.

The PtP framework, helps support examination of the stages through which the shopper cycles and re-cycles during their shopping experience. Each stage in the PtP framework conceptualizes specific elements a shopper engages providing for more precision in research which should yield better forms of shopper segmentation. Segmentation may be improved through the examination of the occasion that has within it, a product/service need requiring resolution. As has been demonstrated in this research, shopper assessment of importance may yield better segmentation results.

The framework provides many opportunities for shoppers to re-evaluate their purchase solutions. It is imperative, therefore, that retailers and brands provide shoppers with consistency in this offerings to help engender repeat patronage. Assortment options provided should be grounded in occasion element assessments associated with the specific shopper segments targeted by the retailer and/or marketer.

The more confident shoppers are that a particular brand or retailer can deliver reliable performance across a variety of occasion assessments, the more likely they are to prioritize that store or brand during solution targeting, resulting in more frequent inclusion in future shopping experiences.

Traditional consumer-oriented marketing focuses on the identification of a measurable and accessible market base to generate sales for a brand's product or a specific retailer. However, shoppers do not consider these elements independently of one another. Shoppers develop solutions requiring a high probability of success, considering brands and products in conjunction with retailer and location/channel. Making products available through particular channels and at specific retailers is best based upon the segmentation associated with occasion assessments. Changes a retailer makes to their brand or product assortment, diminishes the certainty a shopper has for successful completion of the shopping task associated with the retailer for the brand, product, and/or location/channel. Therefore, brands and retailers will find more success focusing on how together they can satisfy occasion-specific purchase needs based on specific shopper segments (e.g. high or low important occasion or recipient).

Using an online survey, key elements of the PtP framework were examined to test the proposed relationships. The first three stages of the framework were explored and the proposed relationships held. The occasion creates a unique view of potential solutions based on the shopper's perception of the occasion. Further, importance perceptions associated with the recipient of the purchase and the occasion by the shopper were demonstrated to alter relationship within the model. Increased importance assessments of the recipient increases shopper focus on product selection. Increased importance assessments of the occasion increases shopper focus on whom (retailer) the shopper chooses to purchase from. These strengthening and perhaps other not tested weakening relationships underscore how retailer, brand, product, location/channel may all increase and decrease in importance for the shopper as they navigate their PtP. These changing relationships also help to demonstrate the complexity of segmenting the shopper, while providing insight into elements which may help provide better solutions. The framework concentrates on shopper needs as the source for segmentation rather than attempting to adapt traditional consumer elements such as price, convenience, age, gender, income, ethnicity, and so forth as segmentation bases. Shoppers will assign higher priority on brands and retailers they believe consistently deliver when they are selected as the purchase solution. The PtP framework helps to guide retailers and brands towards those elements which the shopper examines when preparing their purchase solution, which when delivered consistently by a brand or retailer can help drive shopper equity.

5.1 Limitations

This study has several limitations. The review of literature was designed to be comprehensive, but was subject to our determination of what research during the course of the past 60 years offers insights on shoppers. Thus, there is the potential for some bias in the selection of what consumer literature to leverage. These concerns may have some limited impact, but the development of a more comprehensive understanding of the shopper benefits greatly from leveraging the literature reviewed here.

Another limitation pertains to the structural development of the framework. Although each element and stage receives support in the literature, it would be difficult to state that the framework is definitive. The limited shopper specific relative to the

consumer literature highlights the need for more theory-building research. Therefore, additional research could identify elements absent in extant literature and therefore not considered here.

Finally, the study examined only a limited number of shoppers in a specific shopping context. It would be greatly beneficial to examine a broad variety of shopping contexts, as well as social situations to better understand the influence of occasion.

5.2 Future research

The benefit of the framework is that it provides a vehicle uniquely suited to the dynamic environment in which the shopper attempts to optimize their shopping experience. However, it is critical to examine all shopping contexts (e.g. convenience, stock-up) beyond just quick fill-in to better understand how context influences shopping behaviour. Further, research could examine other elements which drive changes in salience for brand, product, retailer, or location/channel as well as in which stage the influence may establish itself. Examining the impact of importance assessment (e.g. recipient or occasion) by the shopper adds new insight into shopper segmentation strategies and what communication is most effective for that strategy. Research examining varying social shopping situations (e.g. parent/child, group, and sibling) during different stages of the framework could reveal how they affect shopper evaluation of potential purchase solutions.

The framework can also be used as a tool for examining shopper behaviour across varying product categories. Although we assume that shoppers move through the framework stages in a similar manner, regardless of product category, this is not certain. In this research we provide propositions that could serve as direction for various investigations. This theory-building research combined with an initial examination of the framework helps provide a foundation for future research to enhance understanding of the stages shoppers engage along the PtP as well as more effective methods to utilize in segmenting the shopper.

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