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How humans decide

WHAT DRIVES CONSUMER CHOICE, AND HOW BRANDS SHOULD RESPOND

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Reaching a target audience in an attentive state (with the right content) is a widespread equation for effective brand communication. But should it be? Are reach and attention enough to influence people to buy, and continue buying, your brand?

This paper, drawing on WPP Media's database of 1.2 million consumer purchase-journeys, shows that the key to knowing how brands grow is understanding how humans decide. When the complexities of human decision-making are understood, the missing pieces of the equation are revealed: **influence and receptivity**.

Once influence and receptivity are understood, any assumptions that consumers are equally influenceable, or that media channels are interchangeable tools for reaching them, no longer make sense. Planning for long-and short-term influence requires a more nuanced understanding of how people make choices, one that reflects the inherent differences among consumers, categories, and the channels marketers use to reach them.

THE ANALYSIS REVEALS:

- The significant challenge of not just finding an attentive audience, but truly influencing them.
- That media touchpoints, regardless of their reach, possess unequal power to influence consumers; while consumers themselves differ in their receptivity to these touchpoints.
- The profound impact of building sustainable brand bias, whereby 84% of purchases are effectively decided before shopping begins.

This research demonstrates that effective brand growth demands a deeper understanding of how consumers make decisions, focused on three critical dimensions:

Brand priming: the powerful, often unconscious, influence that shapes consumer decisions. Long before people start shopping, they've already been primed on what to buy.

Audience receptivity: consumer openness to marketing communication, and their likelihood of being influenced by it, varies significantly across different product categories.

Touchpoint influence: the nuanced ability of various media channels to impact consumer purchase decisions, depending on context, category, and audience. Effective influence requires looking beyond paid media, to include owned, shared, and earned touchpoints.

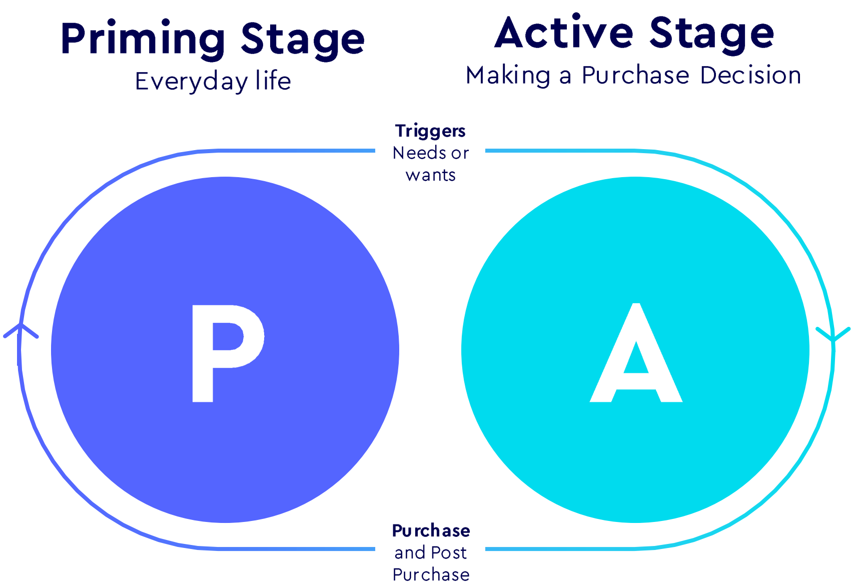
01

UNDERSTANDING THE PURCHASE JOURNEY

The research is based around a simple framework for describing the purchase journey – the process that consumers go through to choose a product or service – which divides it into two main stages:

Priming stage : daily life, while people are not actively considering a purchase, but are exposed to numerous experiences of the brand and category. These shape their perceptions of, and feelings towards, a brand – priming[1] them to behave a certain way once they start shopping.

Active stage: once someone is triggered by a need or want, they enter a period during which they are actively considering, and moving towards, a purchase. This stage can last anywhere between seconds and months, depending on the category.



[1] Priming is a psychological concept that describes how exposure to a stimulus influences someone's response to another subsequent stimulus, typically without conscious awareness of it. It is useful for understanding the purchase journey, because it helps describe the profound effect that brand experiences have on consumer behavior.

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01

BRAND PRIMING MEANS MOST CONSUMERS ALREADY KNOW WHICH BRAND THEY WILL BUY

When shopping, priming is a product of consumers' accumulated brand experiences over time - while consumers aren't actively shopping and typically without conscious consideration - creating **a measurable bias that leads them to favor one brand over another in different buying situations**.

The result of this **priming bias** is that much of people's purchase-journey behavior is predetermined: in every category they buy from, most shoppers will already know which brands they're going to consider; will typically consider fewer than three brands; and will end up choosing the brand they're most biased towards.

The proportion of purchases governed by brand priming is huge: **84% of purchases consist of people choosing brands they're already biased towards before they start shopping.**

This pattern holds across all categories – whether for infrequent high-value purchases like cars or white goods, or regular everyday shopping like toothpaste or soft drinks - with the proportion of primed shoppers never falling below 70%.

This clearly shows that buyers do not come to a brand fresh in the lower funnel; they will likely already know which brand they want to buy. So a large part of performance marketing's role will be converting these buyers from the 84%, rather than acquiring new ones from the 16%. The 84% are looking for the reason to confirm their choice, unlike the 16% who need to know why your brand is the better choice.

Brand-building communication is therefore not optional—it is the essential groundwork that determines whether a brand is even in contention when a purchase decision arises.

	% buying a brand with priming bias	% buying a brand with no/lower bias
Home entertainment	93%	7%
Soft drinks	88%	12%
Quick-serve restaurants	85%	15%
Baby care	84%	16%
Personal care	83%	17%
Oral care	82%	18%
Financial services	82%	18%
Telecoms	82%	18%
Automotive	81%	19%
Consumer electronics	81%	19%
Luxury	79%	21%
All-category average	**84%**	**16%**
All-category range	**70-97%**	**3-30%**

Fig. 1: proportion of category purchases based on priming bias

02

REACH GETS YOU IN FRONT OF AN AUDIENCE BUT RECEPTIVITY DETERMINES WHETHER THEY PAY ATTENTION

Receptivity is a measure of how likely someone is to be influenced by marketing communication: the more receptive to communication they are, the greater the likelihood of influencing them. In the priming stage, this means influencing their perception of the brand, while in the active stage, it means influencing their likelihood of purchasing the brand.

Fig. 2 shows the range of receptivity across all category buyers. Levels of receptivity vary widely among the population, with clusters at either end of the spectrum who are either highly receptive, or unreceptive, to marketing communication.

The unreceptive make up a sizeable average of 23% of category buyers. These are the most marketing-resistant, with relatively few channels that have a demonstrable effect on influencing them. In spite – or because – of the challenge of influencing them, these less receptive buyers are a highly desirable market: because if you can prime them to buy a brand, they're less likely to be diverted by a competitor in the active stage. But if you're targeting them for the first time in the active stage, the chances of influencing them are vanishingly small.

At the other end of the spectrum, the most receptive 10% of consumers will be influenced by just about anything you put in front of them, so they're easily over-exposed and their loyalty may be fleeting. Rather like the 15% of people who click on ads[1], you shouldn't base your media plan around them, because they're not representative of the majority's response to brand communication.

Accordingly, it's important for brands to understand how open to influence the consumers in their category are. The clusters of resistance or openness to brand communication will vary by category, and their level of receptivity will dictate how they respond to your marketing communication.

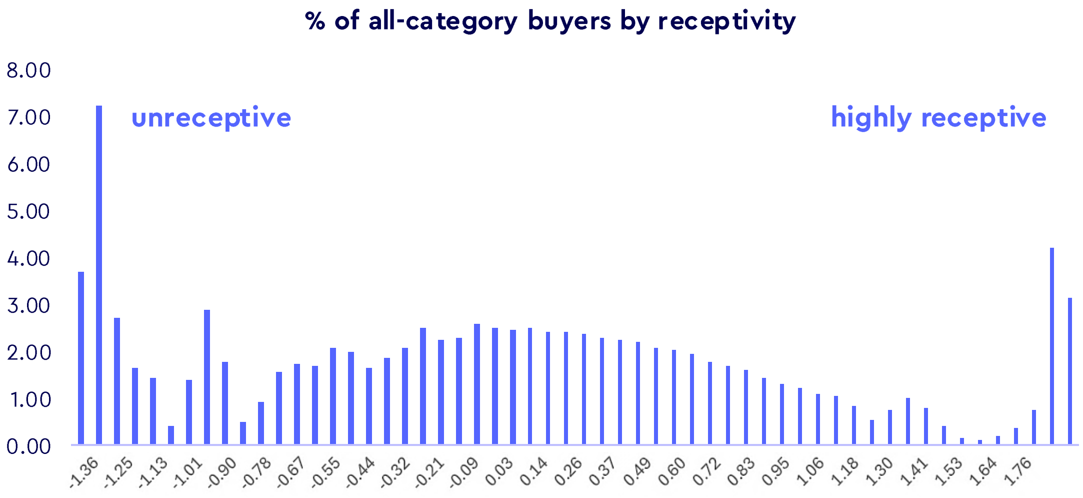

Fig. 2: receptivity distribution among all consumers

Receptivity (ω) is reported as a z-score – how far someone is from the average consumer.
From left to right on the horizontal axis, you see the distribution of all consumers in across all categories.
Negative scores indicate harder-to-influence consumers, while positive scores represent easier targets.

[1] GWI

03

TOUCHPOINT EFFECTIVENESS IS NOT AN INHERENT CHARACTERISTIC OF A CHANNEL, BUT DEPENDS ON THE CONTEXT IN WHICH A TOUCHPOINT IS DEPLOYED

Touchpoint influence is the ability for a touchpoint[1] to change consumer attitudes or behavior. Accounting for touchpoint influence dramatically increases the chance of affecting your target audience's decisions, but requires embracing the complexity of what creates that influence. Because far from being interchangeable vehicles for delivering reach, brand touchpoints vary widely in their ability to influence consumer perception and decisions, depending on the context in which they are encountered.

Just as consumer receptivity varies by category, so does a touchpoint's ability to influence consumers – proving that people employ quite specific decision-making rules of thumb for different circumstances (and undermining the validity of one-size-fits-all 'golden rules' for brand communication).

Picking 4 touchpoints without understanding influence:

20%

chance of influence

Picking the best 4 touchpoints changes your chances to:

47%

chance of influence

Fig.3: Probability of influence of randomized combination of four active-stage touchpoints vs probability of influence of combination of the four best-performing touchpoints

[1]A touchpoint is anything that occupies the space for communication between a brand and consumer; a channel is the environment in which a touchpoint exists. For example, TV ads or product placement are touchpoints in the TV channel; recommendations from friends are touchpoints in the word-of-mouth channel.

03

CONVERTING SALES REQUIRES LOOKING BEYOND PAID MEDIA

OSE TOUCHPOINTS ARE NEARLY 3X MORE INFLUENTIAL THAN PAID WHEN CONVERTING PRIMED CONSUMERS TO PURCHASE

When a primed consumer reaches the active stage of the journey, the role for brand communication shifts to conversion – either to confirm the choice that 84% have effectively made, or to attempt to divert the 16% who may be considering another brand. At this point, the influence of owned, shared and earned touchpoints (OSE) comes to the fore.

Fig. 4 shows how many of the most effective channels integrate OSE touchpoints with paid media. On average, channels containing OSE touchpoints are nearly 3x more powerful than paid media alone in converting someone from bias to purchase.

Communications planning must therefore include 'influence' as a planning metric, and quantify the impact of OSE touchpoints. The result should be integrated OSEP (owned, shared, earned, and paid) influence plans that involve the full range of influential touchpoints, not just paid-media reach plans.

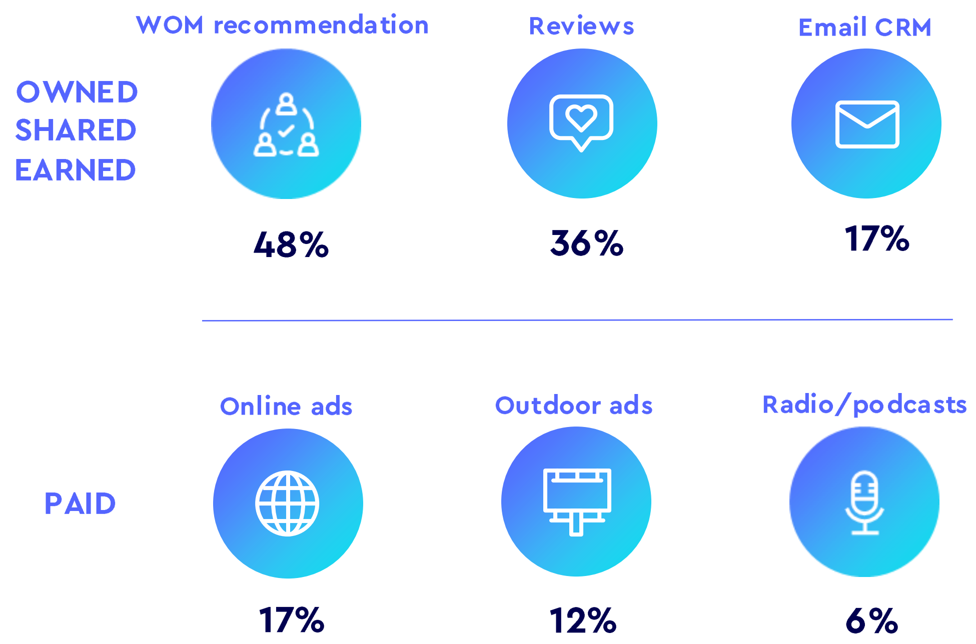

Fig. 4: relative influence of Paid vs OSE active-stage channels

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Summary

This research, based on WPP Media's database of 1.2 million consumer purchase-journeys, exposes a critical blind spot in marketing wisdom on brand communication: **the overlooked power of touchpoint influence and consumer receptivity.**

Current "golden rules" for media planning, when applied universally, can yield only average performance. This is because they fail to account for the inherent heterogeneity across consumers, categories, and channels.

THE CHALLENGE

Primed consumer decisions: 84% of purchases are driven by pre-existing brand bias, leaving a mere 16% of sales truly open to active-stage influence. This means long-term brand building is more critical than ever.

Unequal receptivity: Consumers vary significantly in their openness to marketing. Ignoring this means misallocating resources and missing opportunities to build stable market share from less receptive, more loyal buyers.

Variable touchpoint effectiveness: Not all touchpoints are created equal; their influence varies by context, category and consumer. While paid media builds brands, owned, shared, and earned (OSE) channels are more effective at converting consumer bias into sales.

THE SOLUTION

Marketers must abandon generic media equations and embrace a nuanced, influence-first approach.

THIS REQUIRES

Prioritizing long-term brand priming: invest consistently in building consumer bias towards your brand.

Understanding category-specific receptivity: tailor communication strategies to consumer receptivity within individual categories.

Optimizing for influence, not just reach: integrate influence as a core planning metric, recognizing the power of OSE channels to convert the bias created by paid media.

Our data provides detailed, category-specific insights to improve planning and investment across owned, shared, earned, and paid channels (OSEP), replacing one-size-fits-all approaches with strategies shaped by precision and context. Drawn from over a million consumer journeys, WPP Media's category-level data offers clear guidance for more effective integrated OSEP planning and will be embedded into our Open Media Studio, ensuring these insights can be applied directly and consistently at scale for our clients.

WANT TO KNOW MORE?

To find out how we can help you understand your consumers' purchase journey, contact your WPP Media team.

Appendix

METHODOLOGY

DATA

The data in this report is based on WPP Media's database of Momentum purchase-journey studies, consisting of a decade's research of 1.2 million consumer journeys across over 200 categories in 47 countries. Each Momentum study consists of an online CAWI survey of between 500-2,000 journeys in a single category in a single country, focused on the most recent purchase in the category. Because this data exists at an individual level of responses and measures, with known consideration and purchase sets, we can consider individual-level differences (consumer heterogeneity), along with touchpoint and category differences, over time, and all their interdependencies.

ANALYSIS

The measurement of a channel/touchpoint impact or influence on the consumer is simplified from a Likert scale to a reduced dyadic measure. With these dyadic scores, we then estimate a variable-parametered set of logistic models that capture the probability of individuals' responses (0/1) to touchpoints, as a function of an individual level latent trait ω, which describes that individual's general predisposition to stimuli. We assume that the distribution of ω values is different by category.

These models use individuals' responses to touchpoints (0/1) to estimate the response function to media stimuli (probability of "activation"). It then uses the parameters describing the effectiveness of each touchpoint to estimate the individual level ω that explains each person's set of responses. As a result, we hold estimates of category-level customer stimulus receptivity, and touchpoint power over that specific distribution, which can be described over time.

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