TECHNOGRAPHICS.

The most influential view of your customers…

…that's hiding in plain sight.

9 programs of work.
5 specialist organisations.
18 months of exploration.
188 global experts.
40,000+ consumer conversations.

THE growth DISTILLERY   **VERVE**   TRA   Ogilvy   KANTAR

Let's start by zooming out.

The forces shaping how and where Australians shop...

The pervasiveness of technology is rewriting the rules of consumer engagement...

1.
We have witnessed the most significant acceleration of behavioural change and 'service design' in a century.

2.
The way we interrogate decisions has been forced to adapt from information scarcity, to overload.

3.
As customers shift further digitally, we risk knowing less (not more) about them.

4.
The internet-of-things & tech-ecosystems have more sway over our consumption than we think.

5.
GenAI is reshaping consumer behaviour much faster than it is your industry.

But...

...there is a growing rhetoric around the risks of technology.

Concerns about the risks of technology are gaining momentum, with data privacy becoming a central issue in both national and global discussions. High profile incidents have highlighted the vulnerabilities in data protection, sparking widespread debate about how personal information is managed and secured. As these issues continue to unfold, they are reshaping public attitudes towards technology and raising expectations for stronger privacy safeguards.

Australians increasingly concerned about online privacy after high-profile cybersecurity breaches

Embattled Optus faces class action over huge data breach

75% of consumers are very concerned about scams or being hacked.

With an increasing awareness of the sobering impact of echo-chambers.

We are losing the capacity for civil disagreement, for seeking out differing perspectives, and for tolerating opposing views. **Technology has become a key enabler of confirmation bias**, delivering content that reaffirms our existing beliefs and, as a result, reinforcing divisions.

Rather than encouraging open dialogue and understanding, it often sharpens our edges, leading to more polarised thinking and weakening our ability to connect across differences. This shift carries significant consequences for both social cohesion and the quality of public discourse.

Only

26%

of Australians know how to work around social media algorithms so they can engage with the content they want to see more of.

We're seeing symptoms of this in how Australians make purchase decisions.

81%

online purchases in the APAC region are abandoned.

The highest cart abandonment rate in the world.

Furthermore...

Loyalty has become harder earned and retained

57% of consumers are less loyal to brands now then they were pre-pandemic.

Marketing effectiveness is plummeting

According to meta analysis from the *University of Oxford Business school,* response to advertising is half of what it was three decades ago.

Consumers are seeking new sources of influence, and new nudges for reassurance.

The average western consumer now encounters more data in a day than someone in the 15th Century did in a lifetime. As a result, decision making has become increasingly hard to navigate.

But despite this, our toolkit hasn't evolved alongside our consumers...

1.

We continue to use 'tech-agnostic' traits to architect where and how brands show up.

2.

We've broadly ignore the growing hesitancy and trust in technology.

3.

We discount hidden frictions. That is, the cognitive frictions throughout the purchase journey.

This is forcing customers into purchase journeys that do not align with how they want to behave or interact with brands.

Enter:

TECHNOGRAPHICS.

The antidote to the symptoms plaguing consumer journeys...

The likelihood of basket abandonment

HALVES

Increasing to two-thirds in some industries.

The 'next purchase' likelihood increases by more than a

THIRD

Increasing to up to 50% in some industries.

So, what are Technographics?

Technographics are a combination of **behavioural** and **attitudinal** approaches to technology and the purchase journey that have a meaningful impact on how your brand and product are discovered, shopped and experienced.

Why? Because behavioural and attitudinal factors are much stronger predictors of human behaviours than demographics.

Mindset matters...

Born 1968
Raised in Sydney
Married once
Two children
Wealthy
Famous

A new tool in your growth toolkit.

When it comes to journey design, Technographics is the sharpest arrow in your quiver.

Full Funnel Value

To capture greater value, focusing solely on post-purchase NPS is limiting. Expanding beyond purchases allows brands to unlock across-the-funnel opportunities and better engage customers earlier in their journey.

Design for Differentiation

Strategic segmentation is essential for differentiation, but applying it to journey mapping often misses the mark. Strategy & product design must be treated separately from the purchase journey, due to different consumer needs.

Introducing our Technographic postures.

In an increasingly tech-driven shopping paradigm and with the public discourse around the benefits and risks of technology intensifying, two critical dimensions underpin our Technographic postures:
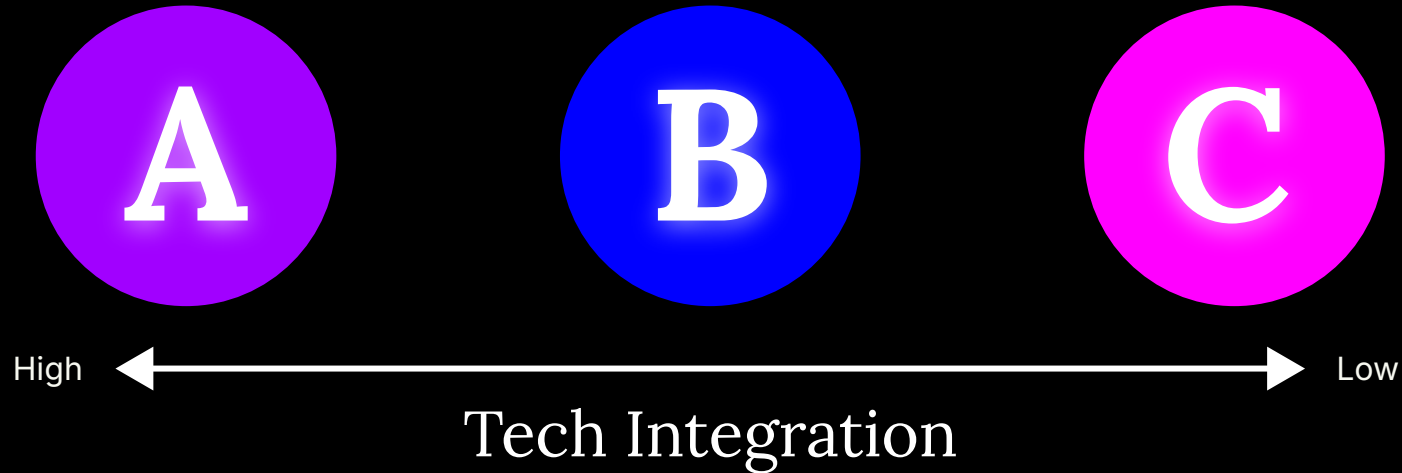
1.
The level of tech integration in our life.

High vs. Low

2.
Our natural disposition towards technology.

Trusting vs. Sceptical

Dimension 1:

High ← → Low

Tech Integration

Along the Tech Integration axis we have three segments. Those who are highly tech integrated, through to those with low tech integration. Those who are highly integrated use more tech hardware and software on a regular basis, and are often early to adopt niche or emerging technologies.

Tech Trusting

Trust

A   B   C
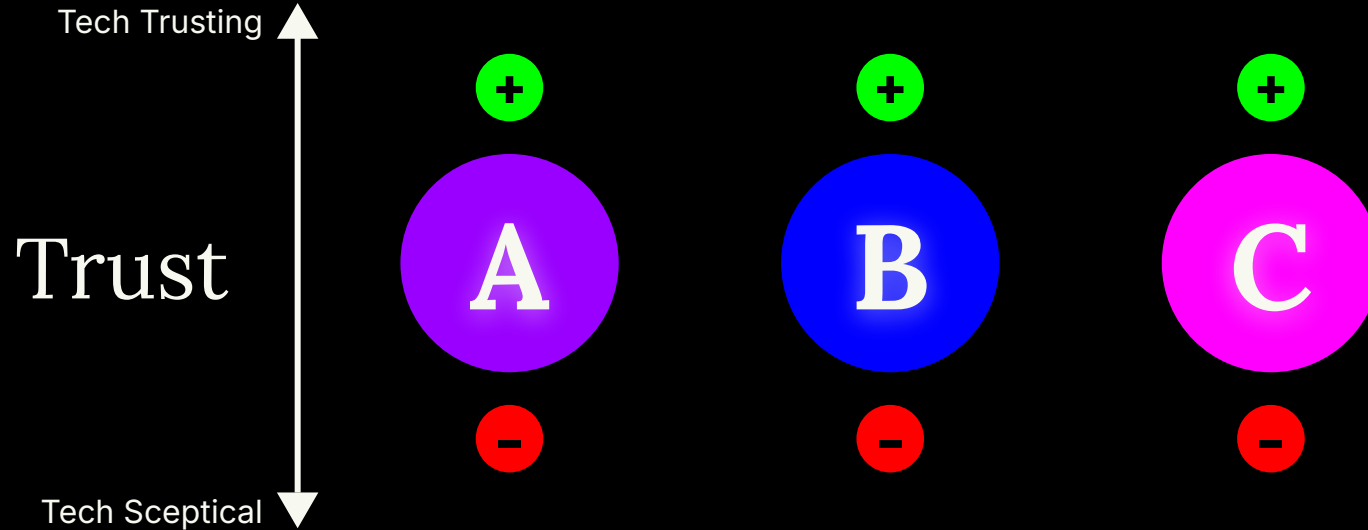
Tech Sceptical

Tech-trusting consumers are more likely to believe the benefits of technology outweigh the challenges, while tech-sceptics are more risk-averse. Both groups, however, span all levels of technology integration, showing that attitudes towards technology aren't solely tied to usage but reflect deeper trust and risk perceptions.
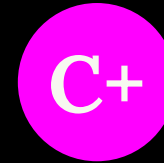
Live and love technology, always at the forefront.
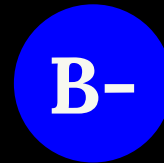
Love using tech to enhance their lives and very trusting.
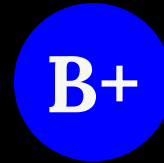
Lacking confidence but enjoy tech once they get going.

Introducing the six Technographic postures.

A+

B+

C+

A−

B−

C−

Highly engaged but equally skeptical. They know how to keep themselves safe online.

Moderately savvy, but are nervous tech users who need reassurance.
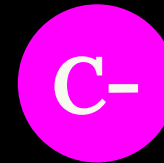
Tech-rejectors (as much as possible), preferring human interaction.

Understanding the essentials of Technographic profiling.

Technographics transcend demographics.

Age and gender are not defining factors in Technographic postures. This is seen in the demographic composition of our most tech progressive posture (A+) versus our least tech progressive posture (C-), with both having identical proportions of females under 50 and males 50+.

A+ ←————————————→ **C-**

31%	Females under 50	31%
20%	Males 50+	20%

The same demographics can have different tech postures:
Female 18-45, SINKS

A+ (21%)

- Full suite of Apple products
- Uses ChatGPT
- Makes accounts on websites
- Uses automatic subscriptions for retail products
- Researches and prefers to purchase products online

B− (22%)

- Owns iPhone & laptop
- Does not use ChatGPT
- Always checks out as 'guest'
- No subscription services for retail products
- Prefers IRL customer interactions and to purchase in store

Age & life-stage is not a direct proxy for tech progressiveness.

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B+ (20% are Boomers)

- Owns iPhone and Apple watch
- Discovers products on social media & enjoys convenience of online shopping
- Speaks to family & friends on facetime
- Tap and pays with phone
- Comfortable sharing info online

C− (15% are Gen Z/Millennials)

- Owns an older iPhone model
- Discovers products via bricks & mortar and prefers in store shopping.
- Mainly uses phone for texts and calls
- Debit card user
- Sceptical on data privacy, has been affected by data breaches

We've developed a ‘tech-score’ to understand how journeys correlate to enjoyment and conversion.

The tech score measures how technology-driven a customer's purchase journey is, factoring in both their level of online engagement and the sophistication of their research, including the use of niche platforms.

Tech powers travel purchases, while grocery stays grounded in physical retail.

Travel and insurance drive the most 'tech progressive' journeys, with high online purchase rates and vast research touch points.

Grocery

Wellbeing   Auto   Home & Outdoor

Home loans / Insurance   International travel

Low tech score

Clothing & Accessories

Domestic travel   **High tech score**

More tailored journeys, mean better outcomes for customers (and your brand!)

Diversity in journey = consistency in joy

The greater the variability in tech score amongst postures in a category, the more consistently different postures experience joy - and this has an impact on sales outcomes - less cart abandonment, higher repeat purchase intentions and greater overall loyalty.

We see this for example when comparing health and beauty journeys vs. overseas travel.

Enjoyment variability is

3X **worse**

for health & beauty, compared to overseas travel.

Tech score variability is

31

for health & beauty, compared to 47 for overseas travel. **Higher tech variability improves enjoyment outcomes.**

Fast and frictionless is not always the answer

Many believe that if we make a journey frictionless, consumers will default to making better decisions while simultaneously ignoring their preferences and the choice architecture in which they are making decisions.

What we see is that if we force people into even the best tech journeys and it is not their preference, that they experience high amounts of **cognitive friction** which leads to significantly more abandoned journeys.

Only

23%

of consumers are willing to automate purchases to make their lives easier.

Only

19%

of consumers want technology to know their preferences and recommend a product, rather than doing the research themselves.

There are four 'no regrets' plays when applying Technographics to experience design.

1.

Widen your aperture on journey design.

Post-purchase measurement of customer satisfaction is fraught with danger given Australia's high cart abandonment rates, particularly amongst the tech negative postures. To truly understand customer satisfaction, it is critical to capture experience based metrics throughout all levels of the purchase funnel.

2.

Stop worshipping at the false altar of frictionless.

We often mistakenly equate digital and quick experiences with being frictionless, but not all friction is bad. It's crucial to recognise hidden frictions, such as cognitive friction, and the value of tactile experiences in creating meaningful interactions.

3.

Decouple your thinking on product and CX.

Segmentation is often misapplied in journey mapping and performance marketing, leading to mixed results in both prediction and effectiveness. This research shows that product strategy and the purchase journey should be viewed independently—our needs within a product don't always align with the needs we have during the shopping experience.

4.

Get back to the business of sparking (and measuring) joy.

Enjoyment throughout the purchase journey is an increasingly potent predictor of loyalty, driven by factors such as the paradox of choice, hypothetical trade-offs, and the psychological reassurance of having made the right decision. Prioritising joy can enhance engagement and build stronger long-term loyalty.

So, where to from here?

Technographics are a powerful tool to understand and architect customer journeys, and meet the increasingly important 'technological postures' of Australian consumers.

Consumers are being forced into shopping journeys that don't suit their technographic profiles and as a result brands are missing out on capturing greater customer value.

A Technographic lens in experience design means brands can better meet consumers where they are, reducing the likelihood of basket abandonment and increasing customer loyalty.

Want to know more?

Ready to unlock the growth potential of your brand? Good, so are we. **The Growth Distillery** pulls marketers out of chaos and cuts through the clutter, providing the 'need to know' of consumer behaviour.

www.thegrowthdistillery.com.au