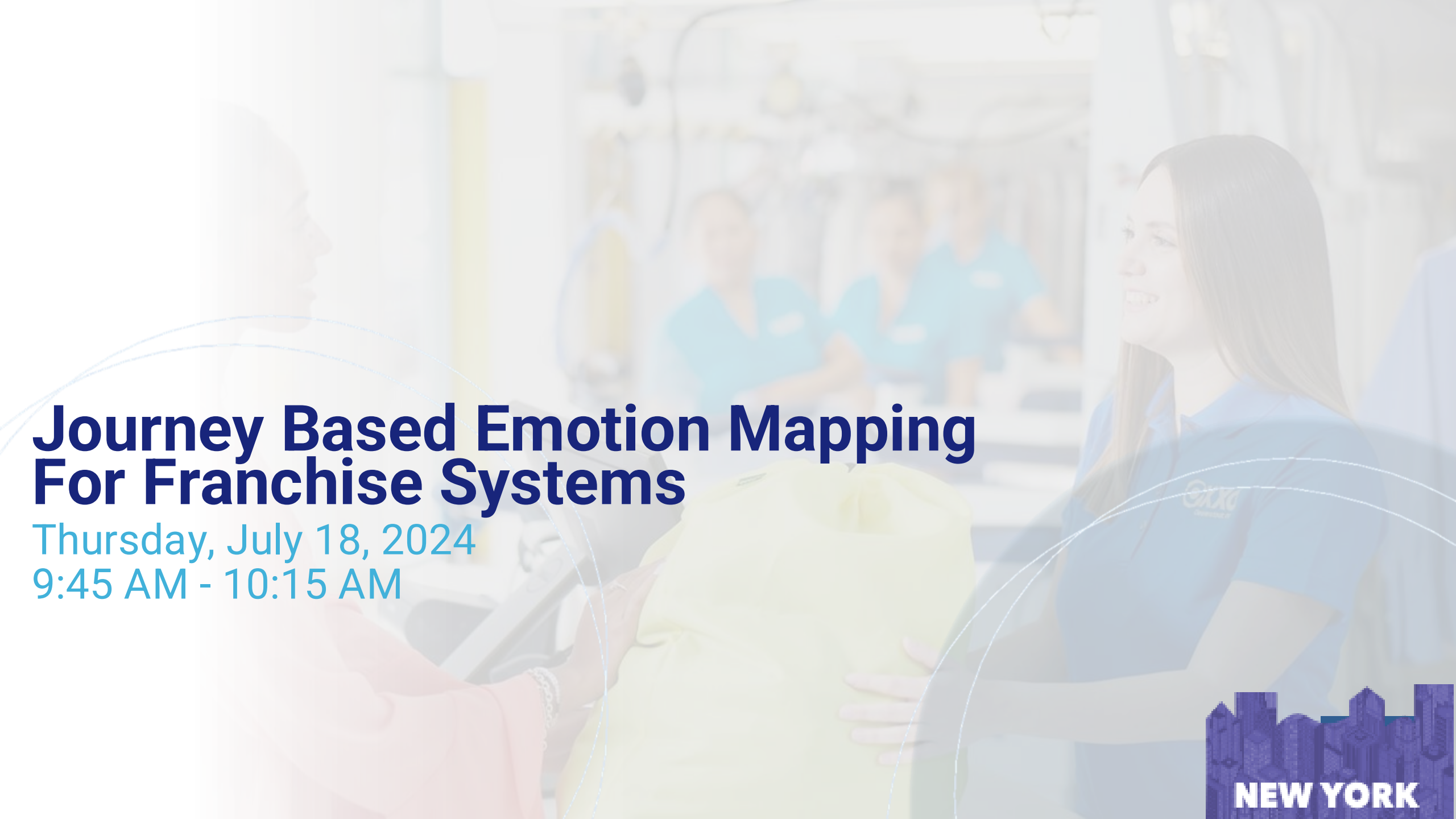OXXO™

Cleaners that Care

Journey Based Emotion Mapping For Franchise Systems

Thursday, July 18, 2024
9:45 AM - 10:15 AM

NEW YORK

OXXO™

Cleaners that **Care**

Vanessa Conde
Vice President of Marketing

OXXO CARE CLEANERS

24 HR. DROP-OFF PICK-UP

OPEN

Healthy green cleaning, you'll feel good about!

non-toxic

OXXO
24 HOUR DROP-OFF

WE'VE GOT YOUR PARKING COVERED!

✓ Free Pick Up & Delivery
✓ 24/7 Automated System
✓ Grocery Shopping Free Parking

CALL US 305.350.7997
AND WE WILL TAKE YOUR CLOTHES OUTSIDE TO YOUR CAR!

STORE HOURS
Monday to Friday
Saturday   Sunday

305.350.7997

✓ RUGS
✓ GOWNS
✓ LINENS
✓ LEATHER
✓ COMFORTERS

OXXO.USA.com

OXXO
Cleaners that Care

400

• Eco-friendly Dry Cleaning
• Delicate Stain Processing
• Gentle Garment Care
• Wash & Fold
• Hand Ironing
• GreenEarth
• Download the App
• 24/7 Pick-Up & Drop-Off

OXXO
Cleaners that Care

BUSINESS HOURS

(346) 764-4888
WWW.OXXOUSA.COM

OXXO
Cleaners that Care
24 Hour Drop-Off

GreenEarth
CLEANING

Current Market Dynamics

% OXXO New Customer Visit Pattern
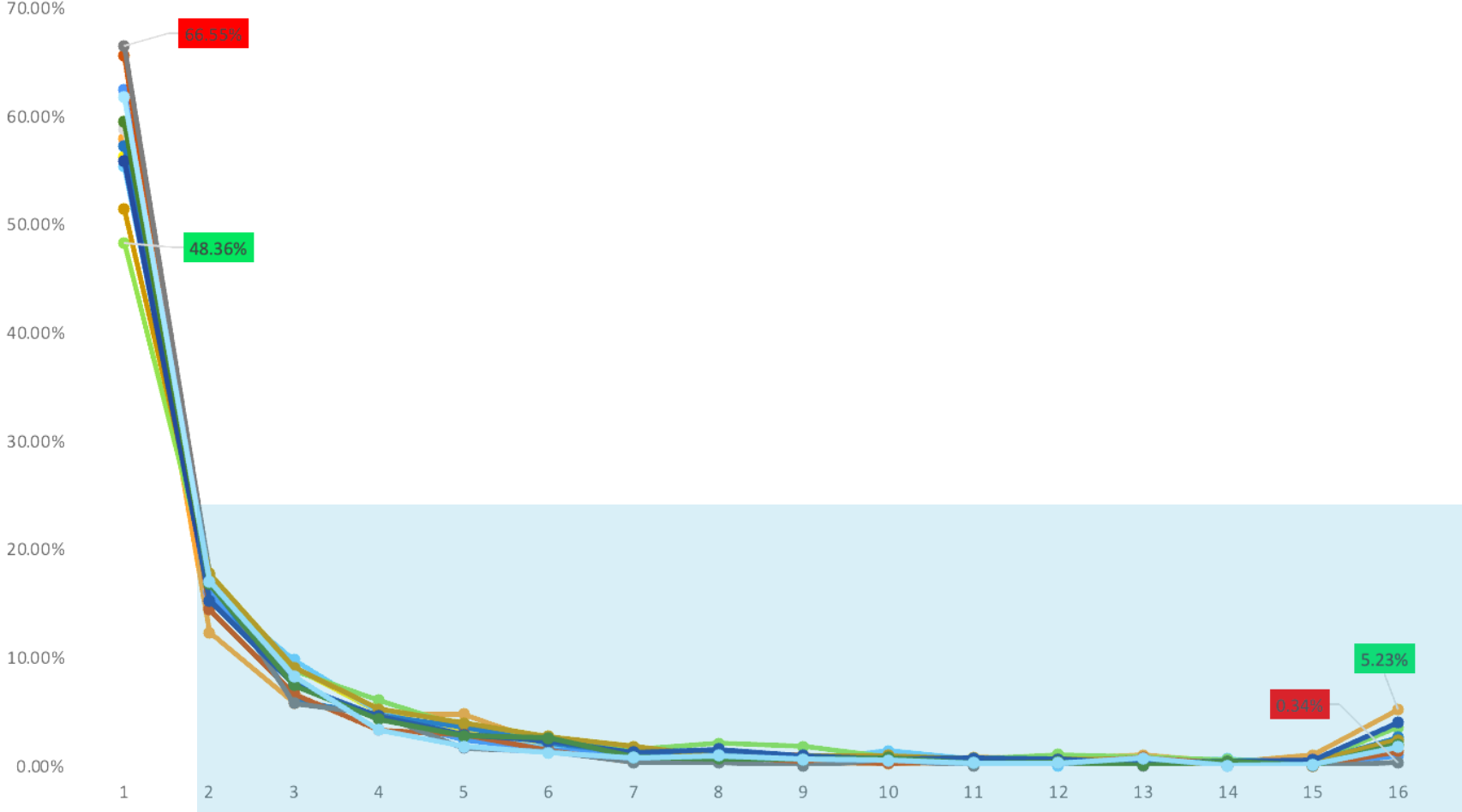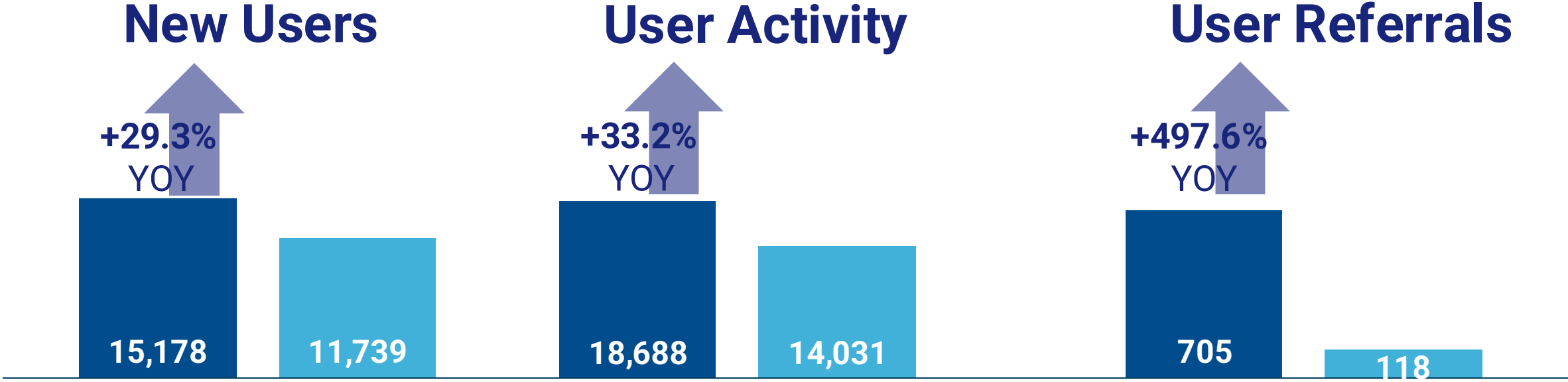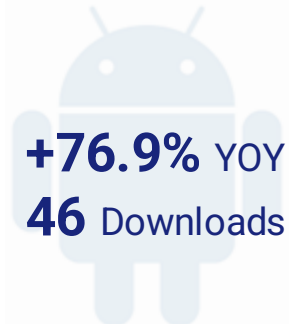
Research Approach

DESIGN
N=10

Stakeholder interviews, design, franchisee interviews

QUAL
N=20

Immersive qualitative research with customers

Online Bulletin Board:

itracks

QUANT
N=800

Survey with consumers in FL, CT, and TX, even split of current and potential customers

Panel Partner: Survey Hosting:

QUEST MINDSHARE™   qualtrics.XM

Martec

Mapping Memorable Moments

PEAK The highest (or lowest) point that a customer experiences when engaging with a brand

Moment when a customer chooses to interact with that specific brand

TRIGGER

END

BEGINNING

All the ways that a brand and customers engage behind the scenes before the customer decides to interact

The lasting impression a customer has of their experience with the brand
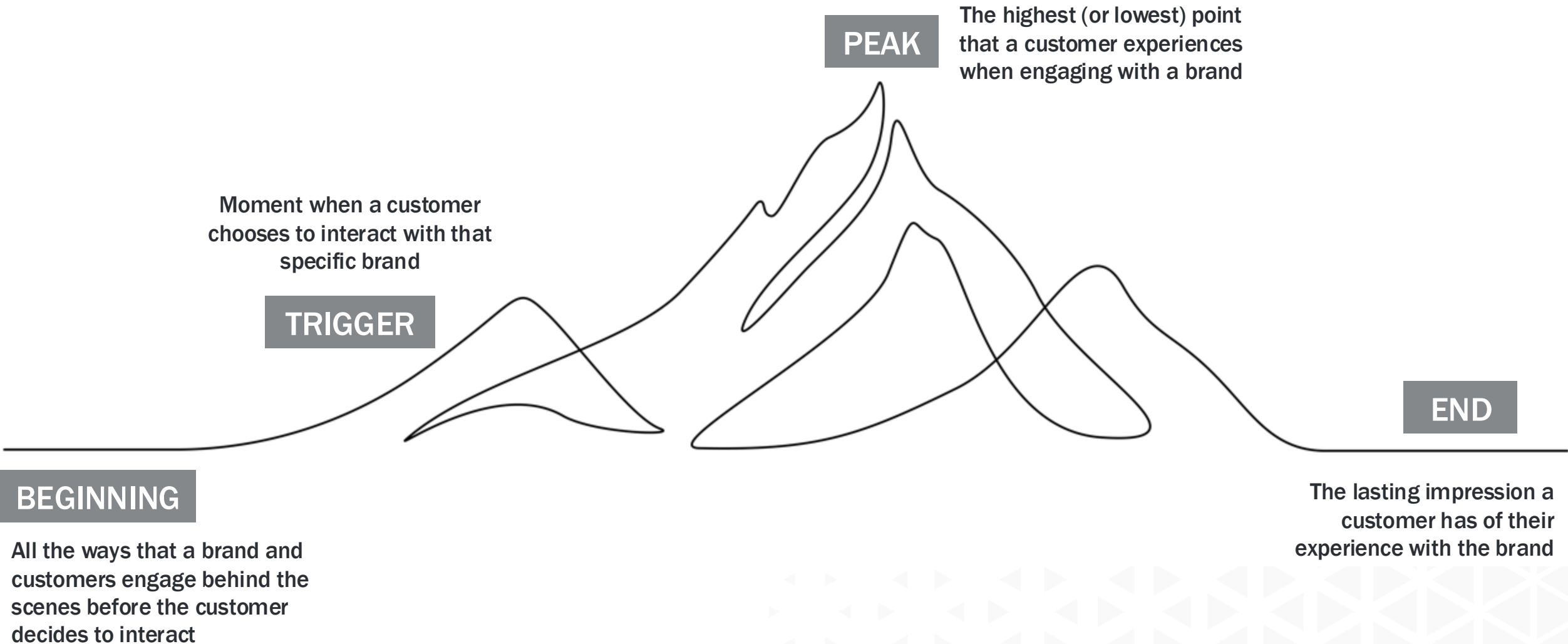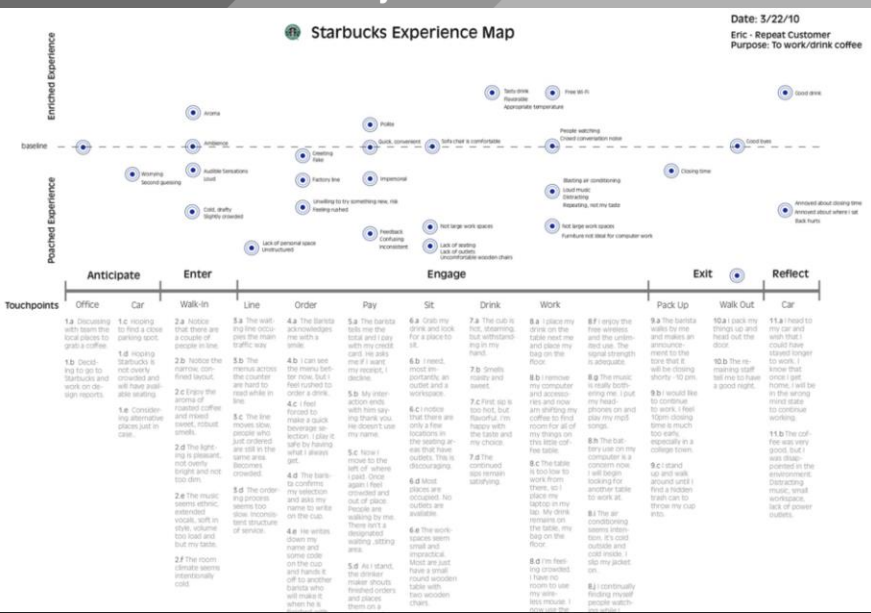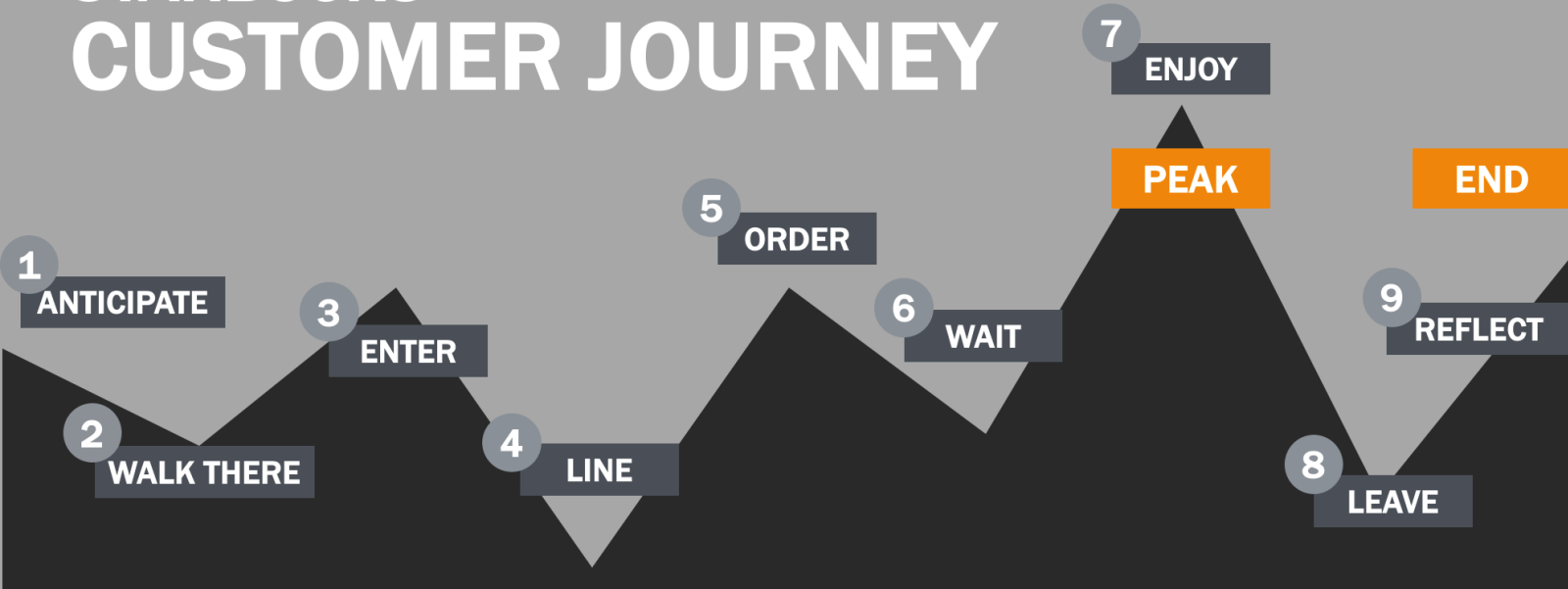
Customer Journey Snapshot

Start of Journey:
- Professional dress code at work
- Special event
- Special cleaning/ alterations needed
- Coupon/promotion

Consideration:
- Stopping by the location is the most impactful method of gathering information
- Most respondents live within 1-3 miles of their dry cleaner

Advocacy:
- 62% of respondents are active promotors of OXXO, 25% are passive customers, and only 13% feel negatively about OXXO

1 Journey Start

2 Awareness

3 Consideration

4 Engagement

5 Advocacy
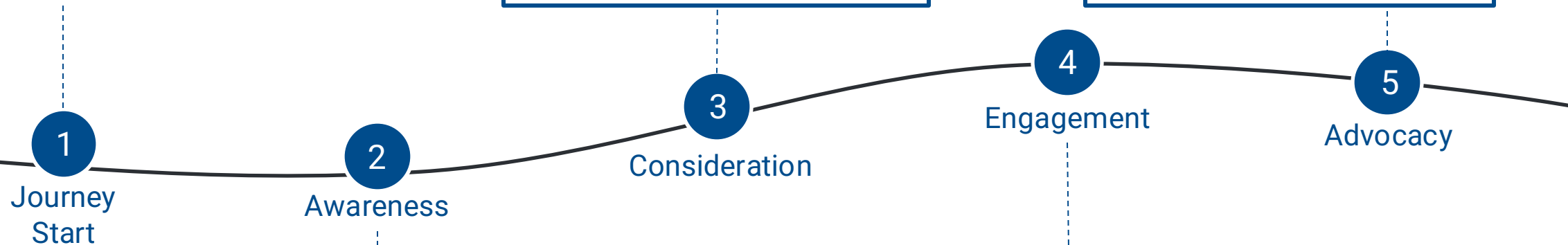
Awareness of OXXO:
- 45% drove by/ saw OXXO, 27% word of mouth, 15% found online
- 30% of respondents did not research before use, 30% stopped into the location to ask questions before use
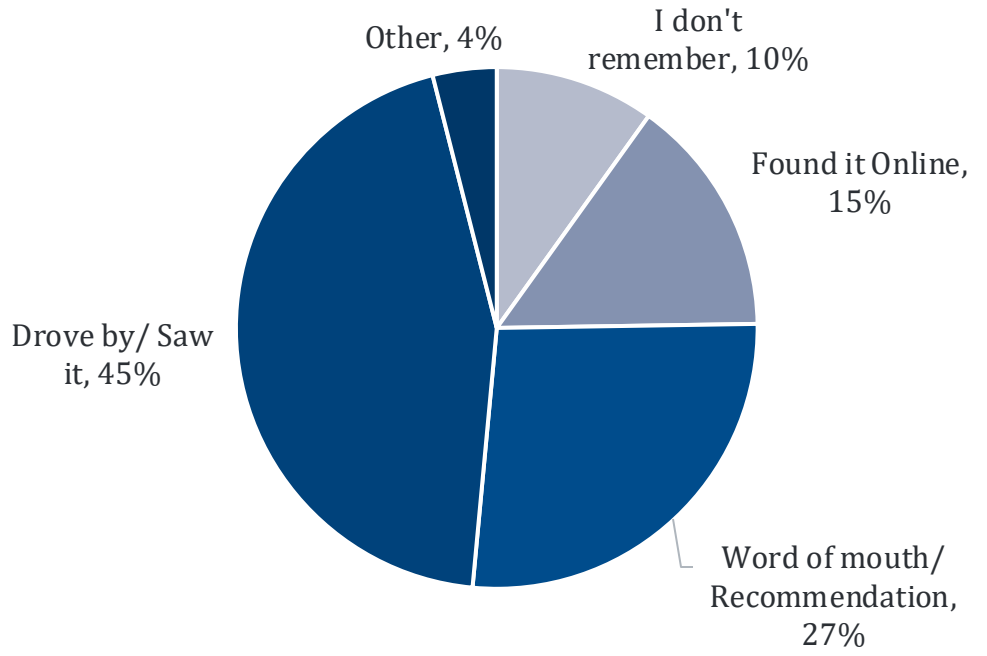
Engagement:
- Most respondents prefer to physically drop off their items in the store, but the 24/7 door is a key point of differentiation for OXXO
- Many customers are not aware of delivery services, but expressed interest in trying them

1 Journey Start

2 Awareness

3 Consideration

4 Engagement

5 Advocacy
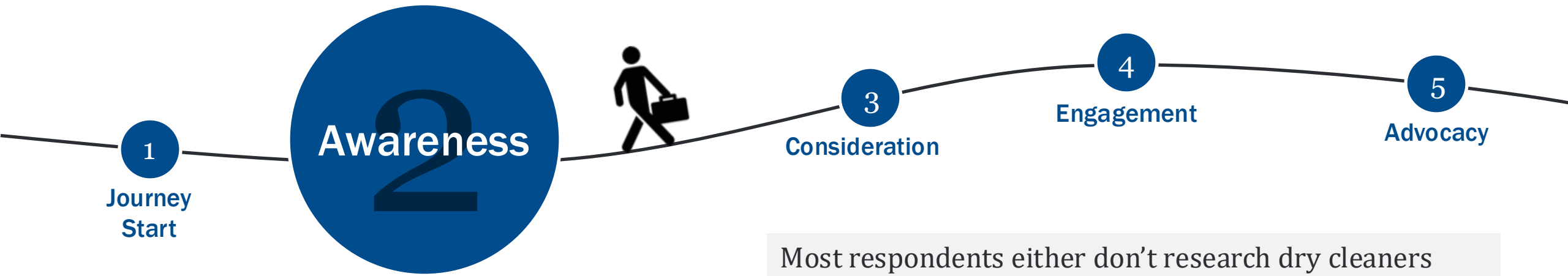
Most respondents either don't research dry cleaners ahead of time, or just stop in to ask questions.

Initial Awareness of Dry Cleaner

- Other, 4%
- I don't remember, 10%
- Found it Online, 15%
- Drove by/ Saw it, 45%
- Word of mouth/ Recommendation, 27%

Awareness/ Research Methods

Method	Percentage
I did not research OXXO before I utilized their services	30%
Stopped into the location to ask questions	30%
Visited their website	26%
Checked/ read Google reviews	25%
Asked around for recommendations	23%
Checked/ read Yelp reviews	13%
Visited their social media	10%
Other	2%

Martec
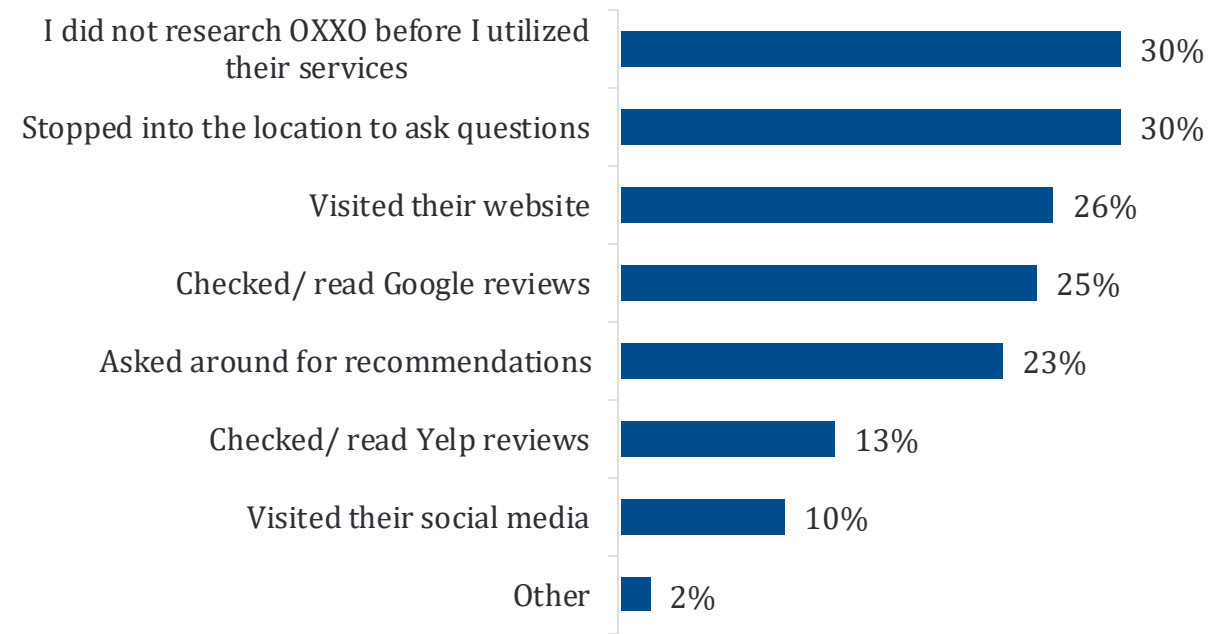
Key OXXO Differentiators

Differentiator	Commentary
Convenience of Location	*"It's all about location. The other dry cleaner I used provided great service & was priced competitively. OXXO is closer so its more convenient."*
Convenience of 24/7 Options	*"The 24hr drop off/pickup is unique and I would say is a core competency I haven't seen in any other dry cleaners."*
Quality	*"They take care of my clothing better than other dry cleaners. They are more expensive but worth it. They use better quality products."*
Eco-friendliness	63% of customers say OXXO's eco-friendliness influences their decision to use them! *"What stood out was the eco friendly and nontoxic system they use to dry clean clothing. There were multiple cleaners in my area with equal distances, but I like to support businesses that are environmentally friendly."*

Frequency of Dry Cleaner Use

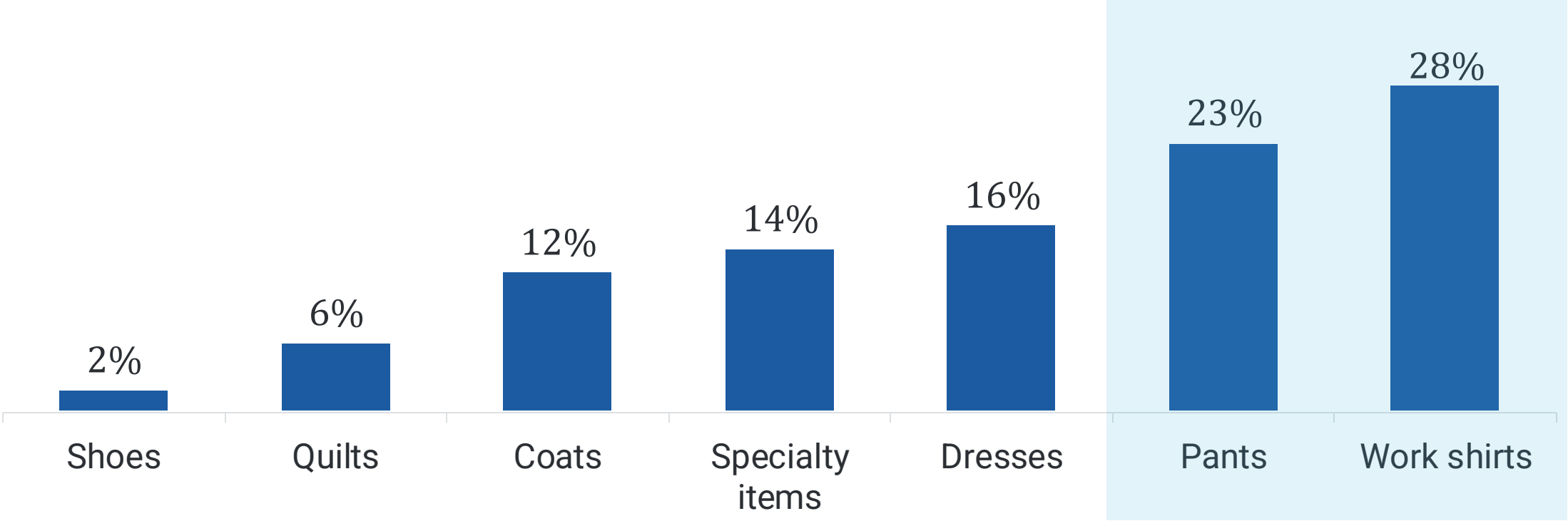| Category	Percentage
Multiple times per week	5%
Once per week	13%
About every other week	15%
Once a month	23%
A few times per year	31%
Only gone once or twice	13%
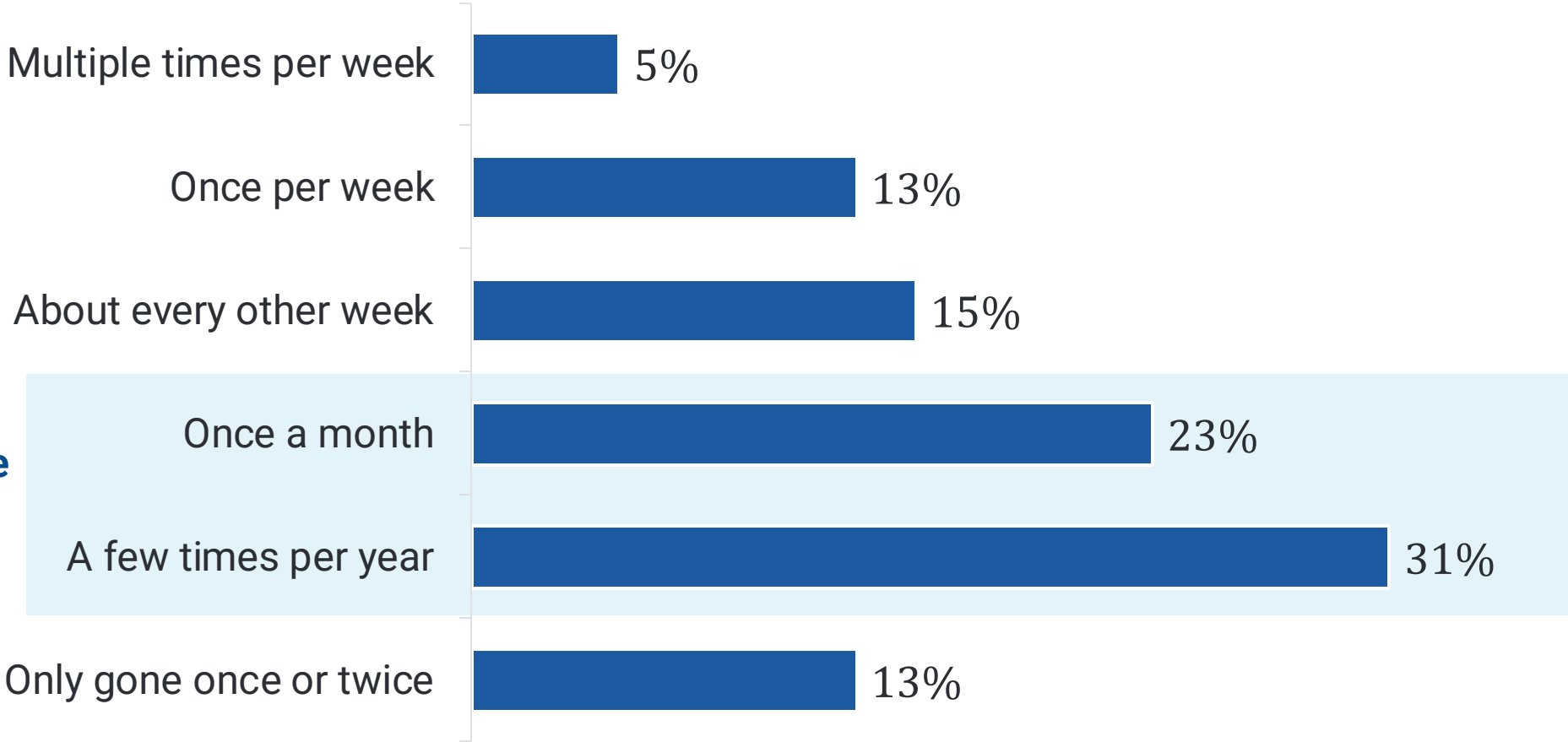
Over half are infrequent customers!

Products Being Dry Cleaned
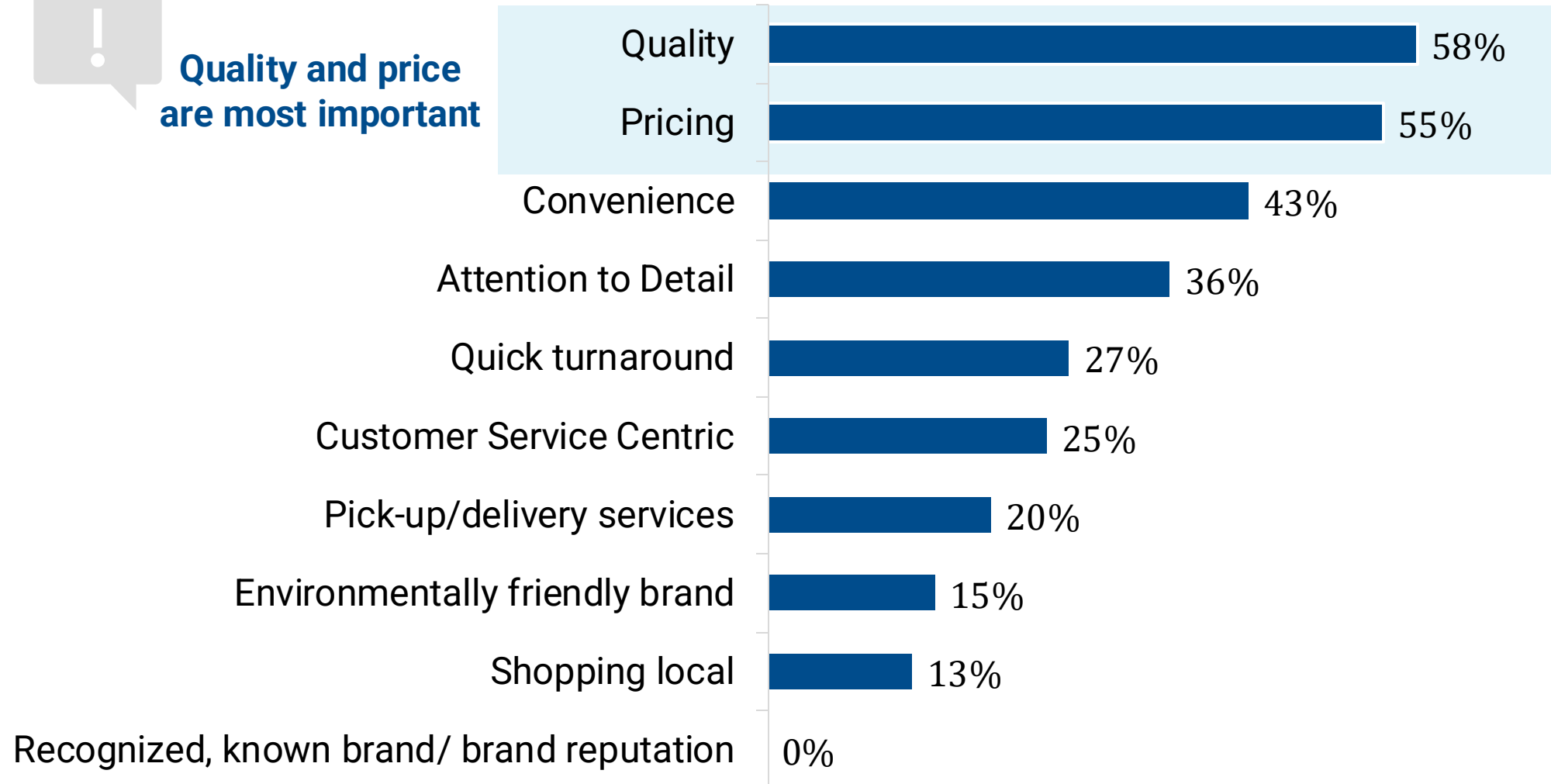
Over half of all products being dry cleaned are work wear

2% Shoes
6% Quilts
12% Coats
14% Specialty items
16% Dresses
23% Pants
28% Work shirts

Segmentation & Personas

How were these personas created?

3 distinct behavior categories were used when creating these personas:

Frequency	Important Attributes	Pick-Up and Delivery
• How frequently do you utilize dry cleaning services?	• What are the top 3 most important factors you look for when considering dry cleaning services? Please select your top 3.	• What percent of the time do you use the following methods to drop off your items for cleaning at OXXO? • What percent of the time do you use the following methods to pick up your items when they are ready?

The segmentation was conducted via cluster analysis and resulted in 5 unique personas (shown right).
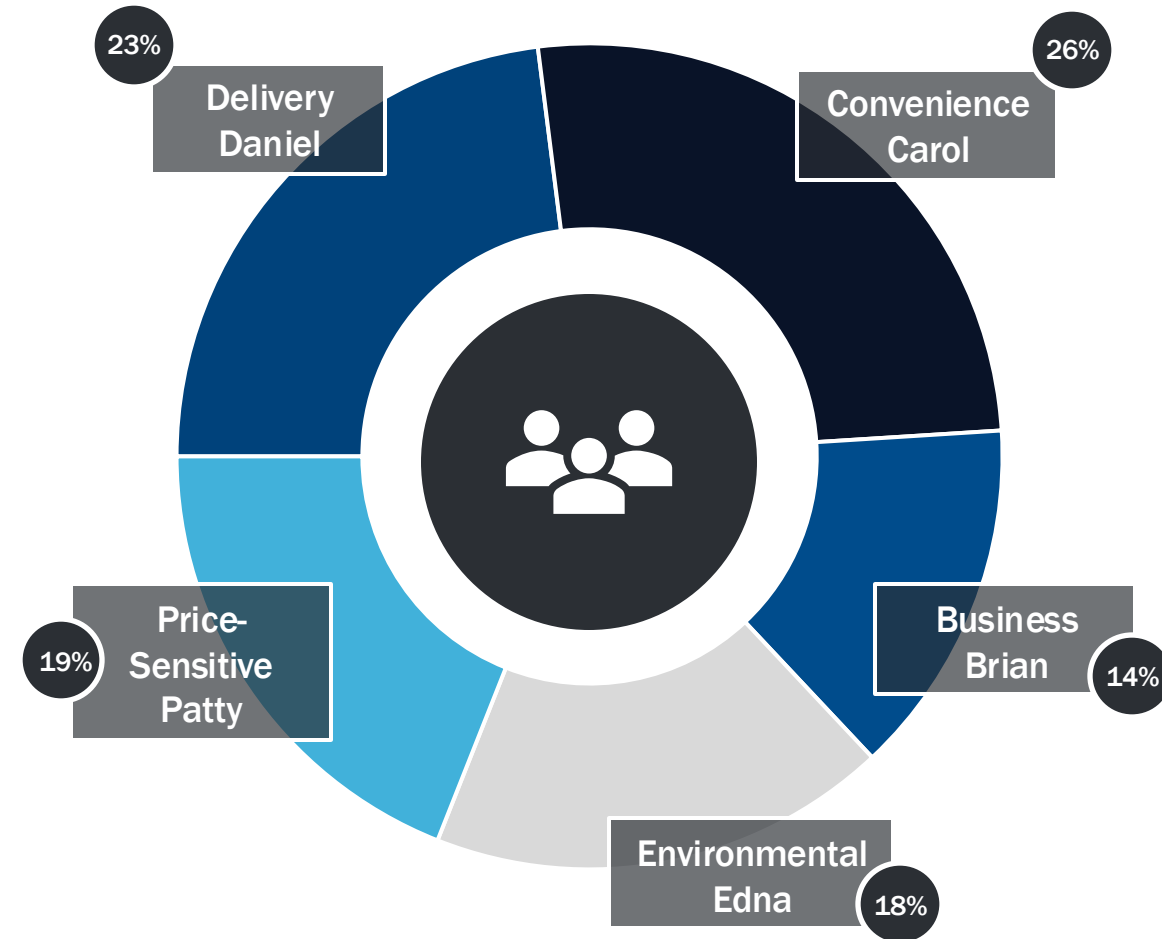
Persona Summary

	Delivery Dan	Convenience Carol	Business Brian	Environmental Edna	Price-Sensitive Patty
% of Population	23%	26%	14%	18%	19%
Frequency	Once a month or once per week	A few times per year	Every other week to a few times/year	Monthly or quarterly	A few times per year
Top Attribute	Delivery services	Convenience	Quality	Eco-friendliness	Price
Attitude	Fashionista Green	Not a fashionista Not green	Not a fashionista Green	Fashionista Green	Not a fashionista Not green
NPS	48	42	59	65	39
Differentiators	• Uses OXXO app • Spends the most • Delivery/ pickup services important	• Fairly price sensitive • View dry cleaning as a chore	• Online research • Mostly work shirts • Texting & app	• Highest NPS • Will pay more for eco-friendliness	• Very price sensitive • Will not use app

MALE 52% FEMALE 46%

AGE: 35-44 years old

INCOME: $50k - $110k

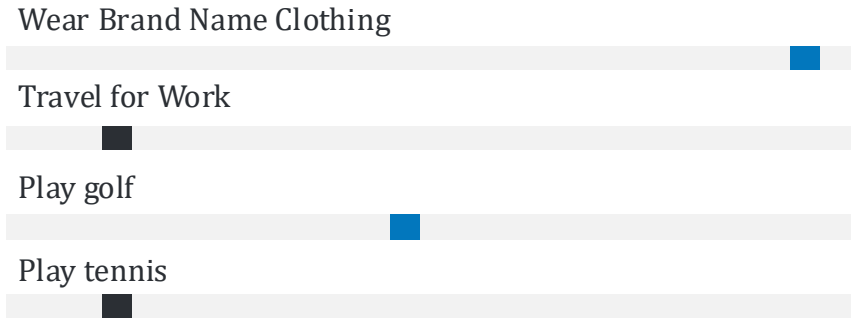**WORK TYPE:** office/remote/hybrid

NET PROMOTER SCORE: 48

FAMILY:
- Mostly married with 0 or 2 children
- Those with children are most likely to be in private school

BEHAVIORS
How often does this segment do the following?

Wear Brand Name Clothing

Travel for Work

Play golf

Play tennis

CONSIDERATIONS
How important are the following? (multiple select)

- Service — 30%
- Detail — 31%
- Convenience — 33%
- Brand — 0%
- Delivery — 38%
- Eco friendly — 21%
- Local — 11%
- Turnaround — 25%
- Pricing — 52%
- Quality — 48%
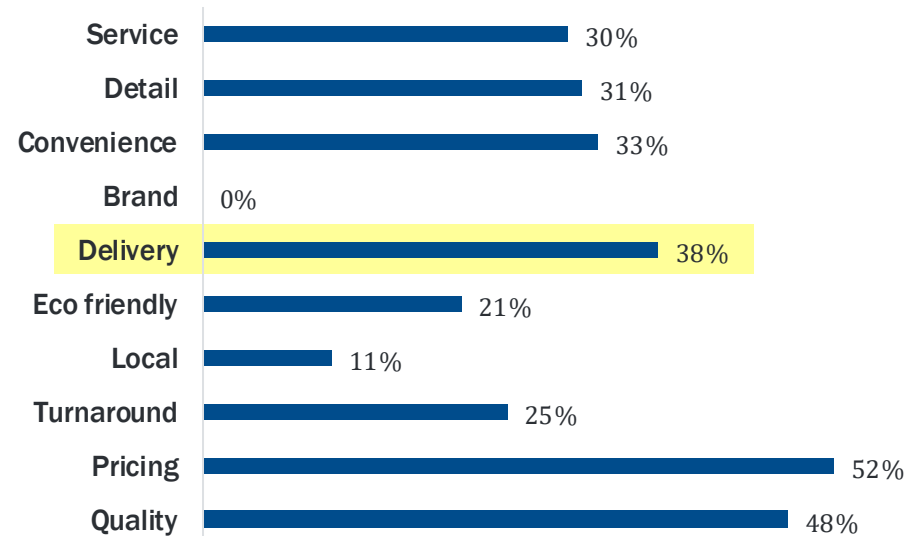
DRY CLEANING UTILIZATION

1-2x ever | A few times/year | **Once a month** | Every other week | **Once per week** | 2+ times/week

ATTITUDE

I consider myself a fashionista.

MEAN 3.78
SEGMENT 4.77

Being green is important to me.

MEAN 5.23
SEGMENT 5.58

PERSONA DIFFERENTIATORS

- OXXO's biggest competitor for Segment 1 is Tide (40% of this segment has used Tide)
- Most likely segment to use OXXO's services besides dry cleaning (laundry/ wash and fold)
- Wide variety of products getting cleaned by OXXO
- Most likely to spend more $ per transaction
- Most likely to use the OXXO app
- Most likely to use social media to research OXXO
- Has tried other brands, but now loyal to OXXO

CUSTOMER JOURNEY MAP: PERSONA 1 | DELIVERY DAN

STAGES	NEED IDENTIFICATION	TRAVEL TO STORE	DROP OFF ITEMS	PICK UP ITEMS	WEARING ITEMS
ACTIVITIES	Primary goal(s): I want to keep my nice garments protected/ cleaned properly (75%)	Drive or walk to store/locker to drop off items	Segment most likely to use OXXO's pick-up services (34%)	Segment 1 prefers to pick up items either via OXXO locker (37%) or delivery (24%)	~Average, mid-range Net Promoter Score (48% for segment; mean is 49%)
EMOTIONS	NEUTRAL	EXCITED	CONTENT	RELIEVED	PRESENTABLE
TOUCHPOINTS		• Segment is one of the likely to use the app – messaging should cater to them	• Pick-up and delivery services are critical for this group	• OXXO locker	• Communication via app
CONSIDERATIONS & CHALLENGES		• Proximity to store – segment 1 averages drives 1-3 miles to OXXO		• Prefers text message or email communication about promotions/ discounts	• In-app rewards program • Influencer/ referral program

mean

segment

Journey Stages By Segment

MES BY CUSTOMER SEGMENT

MES by Customer Segment Along the Customer Journey

— Segment 1   — Segment 2   — Segment 3   — Segment 4   — Segment 5

When you initially made the decision to enroll your child(ren) in swim school | When you were researching your swim school options | Before your first lesson at Goldfish | When attending classes routinely | Your child(ren) graduating and moving up a level | Withdrawing your child(ren) from Goldfish
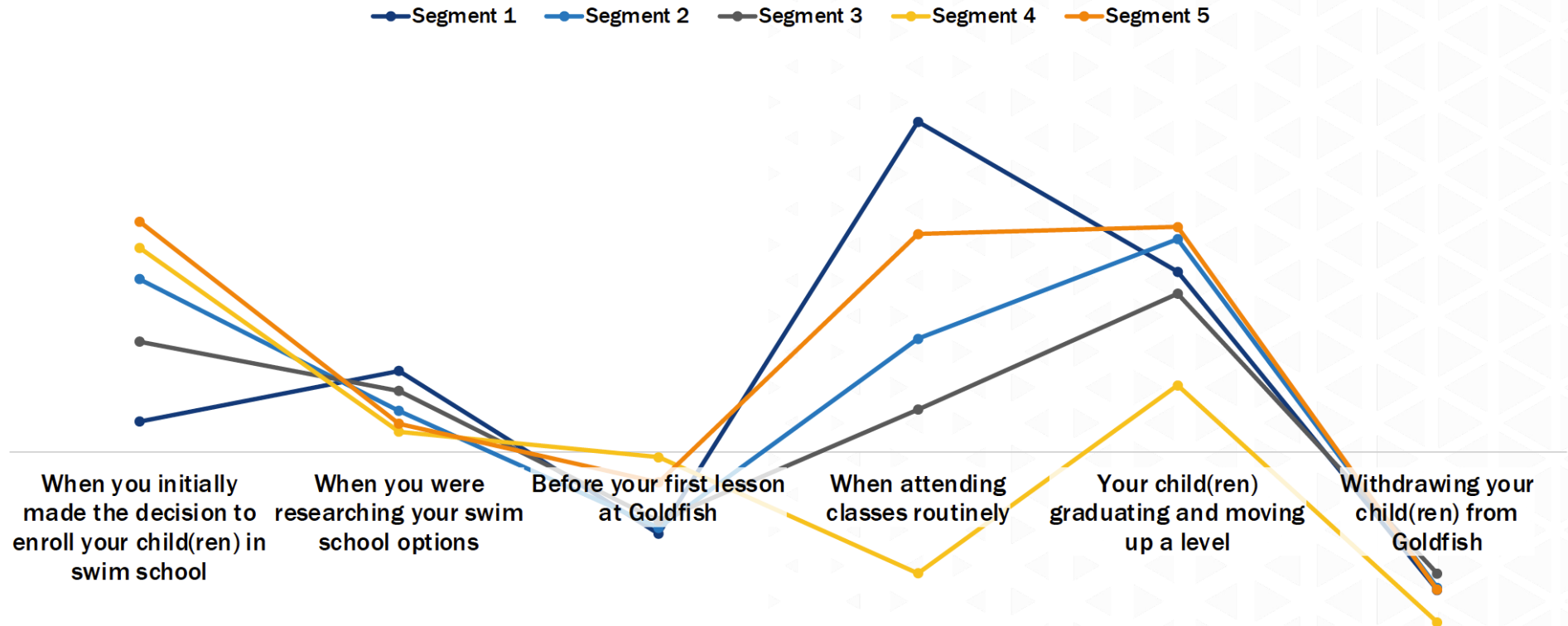
Note: Example from a different franchise system output.

Key Recommendations

In-Person Interactions

Increased focus on training and in-person interactions

Local Marketing

Location is critical to dry cleaning selection

App Use

Make dry cleaning use a part of everyday life

Promotions & Pricing

Transparency around pricing and use of promotions

Sustainability Messaging

Green initiatives are impactful to clientele

Brand Evolution

Original → Final Lockup

Journey Preview for Customers

Our process gives you more time to do you

DOWNLOAD THE APP

SCHEDULE A PICK-UP

Schedule your pick-up in the app. Set a time and where your items are placed.

PLACE YOUR ITEMS OUTSIDE

Put your items in the OXXO laundry bag and place them in the spot you indicated in the app.

WAIT FOR IT...

Sit back, relax and enjoy the time you've saved. We'll take care of the rest.

BRING YOUR ITEMS BACK INSIDE

You'll be notified when your items are being delivered. Just bring them in and enjoy your clean clothes.

Hi there, have a question? Text us here.

Locations   Text us

Franchise Development

Attracting a New Demographic

New Owners (30-40 demographic):

- Royal Palms Re-sale
- Midtown Miami Re-sale
- Katy Texas Branded Sale

The Franchise sales marketing also successfully drove
engagement with 232 form submissions.
Cost per lead = $3,250 / 232
Cost per lead ≈ $14

Solutions

Web Analytics

Q1 2024 over Q1 2023
- News users up +29.3% (15,178 vs. 11,739)
- User activity up +33.19% (18,688 vs. 14,031)
- Event count up +38% (109,205 vs. 79,125)
- Direct Marketing increased +20.04% (6,013 vs. 5,009)
- Referral increased +497.6% (705 vs. 118)
- Paid search increased +10,750% (438 vs. 4)
- Overall Traffic Acquisition increased 31.31%

Q1 2024 over Q4 2023
- New users up +39.58% (15,178 vs. 10,874)
- User activity up +35.78% (18,688 vs. 13,763)
- Event count up +25.73% (109,205 vs. 86,859)
- Organic search increased +33.34% (4,727 vs. 3,545)
- Display increased +196.56% (3,188 vs. 1,075)
- Referrals increased +389.58% (705 vs. 144)

YoY 2023 vs. 2022
- News users up +220.1% (42,397 vs. 13,245)
- User activity up +213% (50,816 vs. 16,212)
- Event count up +197.31% (291,746 vs. 98,129)
- Direct Marketing increased +217.65% (17,353 vs. 5,463)
- Referral increased +207.04% (436 vs. 142)
- Paid search increased +107, 150% (2,144 vs. 2)
- Overall Traffic Acquisition increased +220%

FORM FILLS
Since the launch of the website customers have submitted **355** form fills, with the highest amount of forms submitted in October 2023 when the website was fully completed.
Cost per lead (CPL) = $44,502 / 355
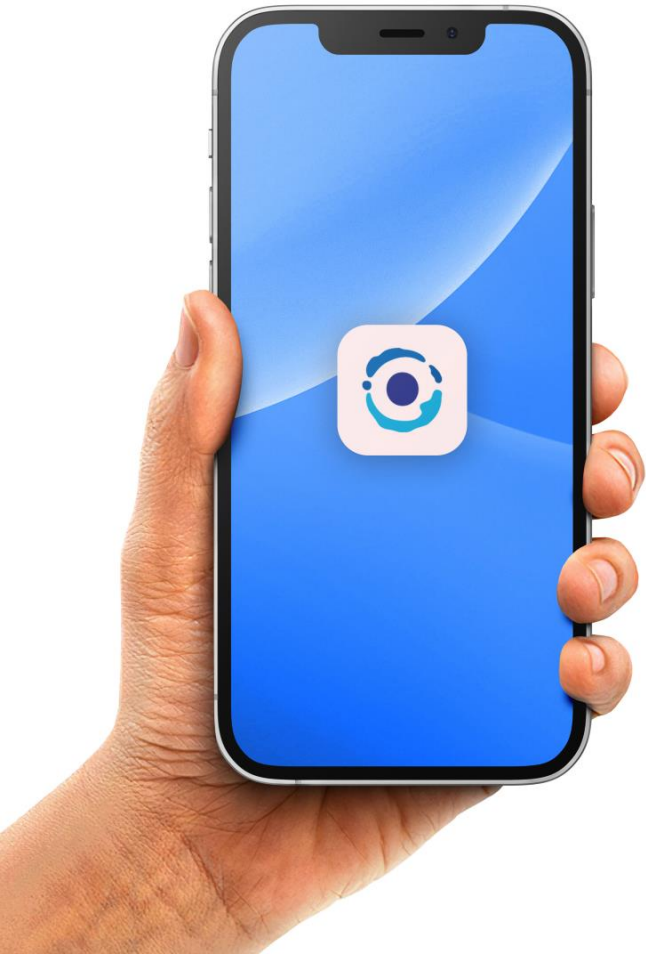Cost per lead (CPL) ≈ $125.35

**QR CODE SCANS
Total: 404**

Convenience

March. 2024
Apple Total Downloads: 339 | % change: +17%
Android Total Downloads: 46 | % change: +76.9%

Closing The Gap

Promotions: Sales Generated

20Valetine
Boca: $251.25
SouthChase: $1,793.38
Lake Nona: $1,095.96
Hollywood: $262. 71
Short Hills: $717.92
Total: $4,121.22

LUCKY20
SouthChase: $ 413.77
Lake Nona: $238.33
Hollywood: $544.88
Short Hills: $1,557.98
Total: $2754.96

WeCare
Short Hills: $2,117.09

Newsletter

- Monthly Average Deliveries: **44,658 customers**
- Average Unique Opens: **9.02%**
- Average Bounces: **1.0%**
- Average Unsubscribes: **0.4%**
- Complaint rate: Below **.1%**

THANK YOU!

JOSH EMINGTON
Vice President, The Martec Group

VANESSA CONDE
Vice President of Marketing, OXXO Cleaners

QUESTIONS

RESOURCES

Considering mapping the journey for your brand? Scan here to download our Customer Journey scoping tool:

Scan here to download The slides from today's presentation: