



# SEPARATING SIGNAL FROM NOISE: **HOW TO FIND, REACH, AND WIN TODAY'S SHOPPER**

A new study from Bazaarvoice

# CONTENTS

Today's shopper journey is noisy.	3
Lauren's Journey	4
Doug's Journey	6
Megyn's Journey	8
John's Journey	10
What this means for marketers	12
You need to reach people, not personas. This requires better data.	13
Mobile is the new storefront. Deliver a great customer experience there.	14
To win consumers, deliver trusted content wrapped in a great experience.	15
To find, reach, and win today's shoppers, do three things.	16
Methodology	17
About Bazaarvoice	17

# TODAY'S SHOPPER JOURNEY IS NOISY.

Marketers know that today's consumer journey looks more like an unplanned adventure than a direct path. Every consumer takes an individualized path to purchase, and is typically shopping for multiple items at once. The mix of channels and devices in use can be dizzying. The sources of information and influence are the most diverse they've ever been: social media, consumer content, editorial content, advertising, and much more. Shoppers are firmly in the driver's seat.

Predictable shopping patterns, once so fundamental to marketing and advertising strategy, have gone by the wayside. Persona- and demography-driven strategies now fall short – the winners in this new era are the brand and retailers who've put a plan in place to meet actual shoppers anywhere along their path to purchase.

## THE ONCE-SIMPLISTIC SHOPPER JOURNEY NOW CONTAINS MULTITUDES. HOW CAN MARKETERS FIND, REACH, AND WIN SHOPPERS IN TODAY'S WORLD?

New Bazaarvoice research examines shopper behavior in our massive network of retailer and brand websites, with a more detailed look at the journeys of a few shoppers. We recruited a small group of consumers to keep a diary while shopping for items in the Home & Garden, Consumer Electronics, Home Appliance, and Apparel categories. They recorded their activities and thoughts while going through the shopping process, both in-store and online. We also watched their activity on our network of 5,000 brand and retailer websites. We saw what products and brands they researched across the network – engaging with ratings, reviews, and other forms of CGC.

**In this report, we share portraits of four shoppers as they shopped in different categories – and what they have to teach marketers.**



# 1 LAUREN



29-YEAR-OLD FEMALE



SOME POSTGRADUATE EDUCATION

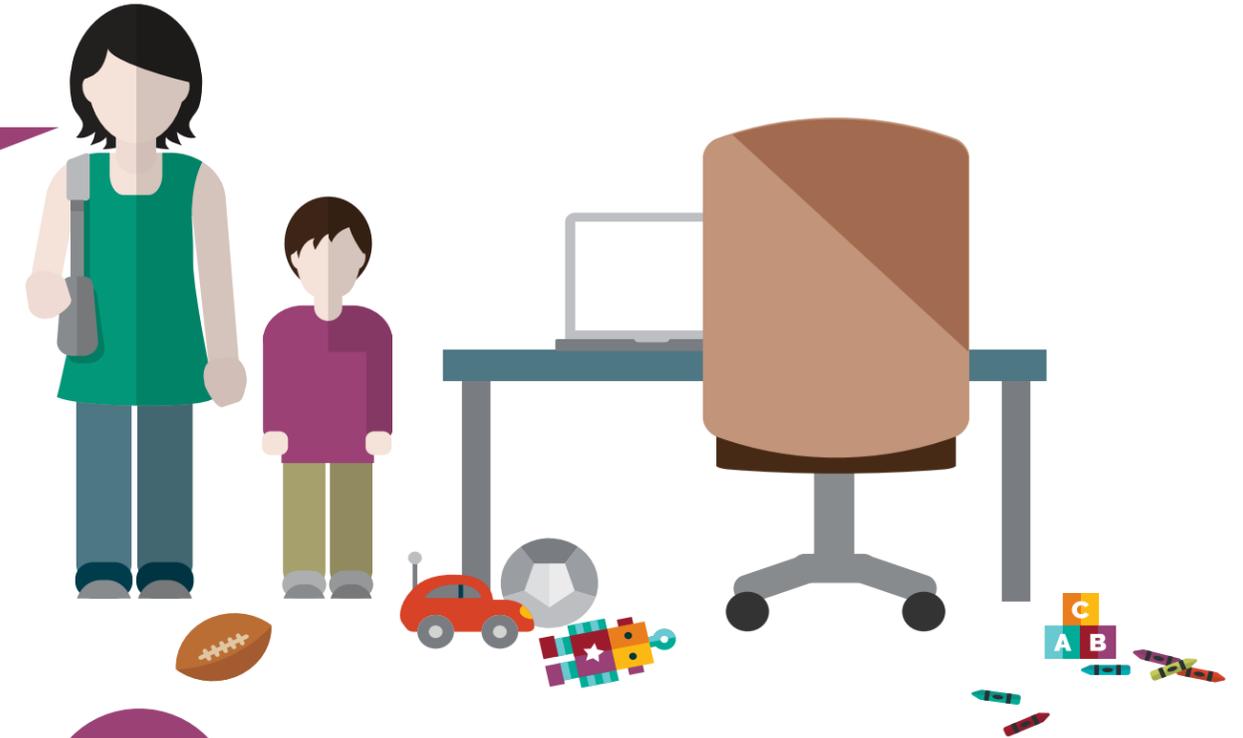


HOMEMAKER



ALWAYS READS REVIEWS WHEN SHOPPING ONLINE

ONE REVIEW, THEY ACTUALLY USED THE BAG ALMOST AS A DIAPER BAG SO THEY POSTED PICTURES OF ALL THEIR STUFF IN THERE AND IT LOOKED SO ORGANIZED, SO THAT WAS A BIG DRAW FOR ME, ESPECIALLY SINCE IT'S NOT ACTUALLY A DIAPER BAG.



## THE JOURNEY:

Lauren is shopping for a new tote – “a gift for myself”. She needs something bigger that can carry her personal items, as well as things she needs for her kids. She wants something that can help her stuff stay organized, is durable and practical, and looks good.

START

Lauren’s journey is entirely on mobile. She starts with a Google search to explore options.

She heads to the mobile site of a major department store. She views a product page and reads reviews for one tote. She likes that it’s easy to clean. It’s close, but not quite what she wants.

She looks at a few options in-person at the department store but the bag she found online isn't in the store, and she doesn't find anything else she likes.



*PICTURES ARE ALWAYS A PLUS. WHEN A PERSON POSTS PICTURES IN A REVIEW, THEY ARE VERY DIFFERENT THAN THE PICTURES THAT ARE TAKEN TO SELL A PRODUCT. IT'S A MORE "IN-REAL-LIFE" VIEW.*

## THE TAKEAWAYS

- Review content and visual content complement each other, engaging both the rational and emotional processes that shape how shoppers make decisions. Marketers need both types of content to win consumers.
- Shoppers rely on authentic, relatable content – the kind you can only get from other consumers.

Back online more than a week later, Lauren visits the site of another department store. She's inclined to buy there since she already has an account, so "buying is easy."

Then she discovers there is visual content on the site showing a real person holding the tote, and someone's photos of how the bag can be used to carry diapers. She can tell from the pictures that it will work well for her, and she makes the purchase.

*I LOVE THE GOOD REVIEWS AND PICTURES SHOWING A REAL PERSON SO I CAN SEE HOW THE PURSE WILL LOOK WHEN I AM HOLDING IT.*

### SHOPPING BEHAVIOR FOR THIS JOURNEY:



**FINISH**

 When she receives the bag, Lauren posts a photo on social media.



Journey Duration  
**13 DAYS**

# 2 DOUG



44-YEAR-OLD SINGLE MALE



SOME COLLEGE

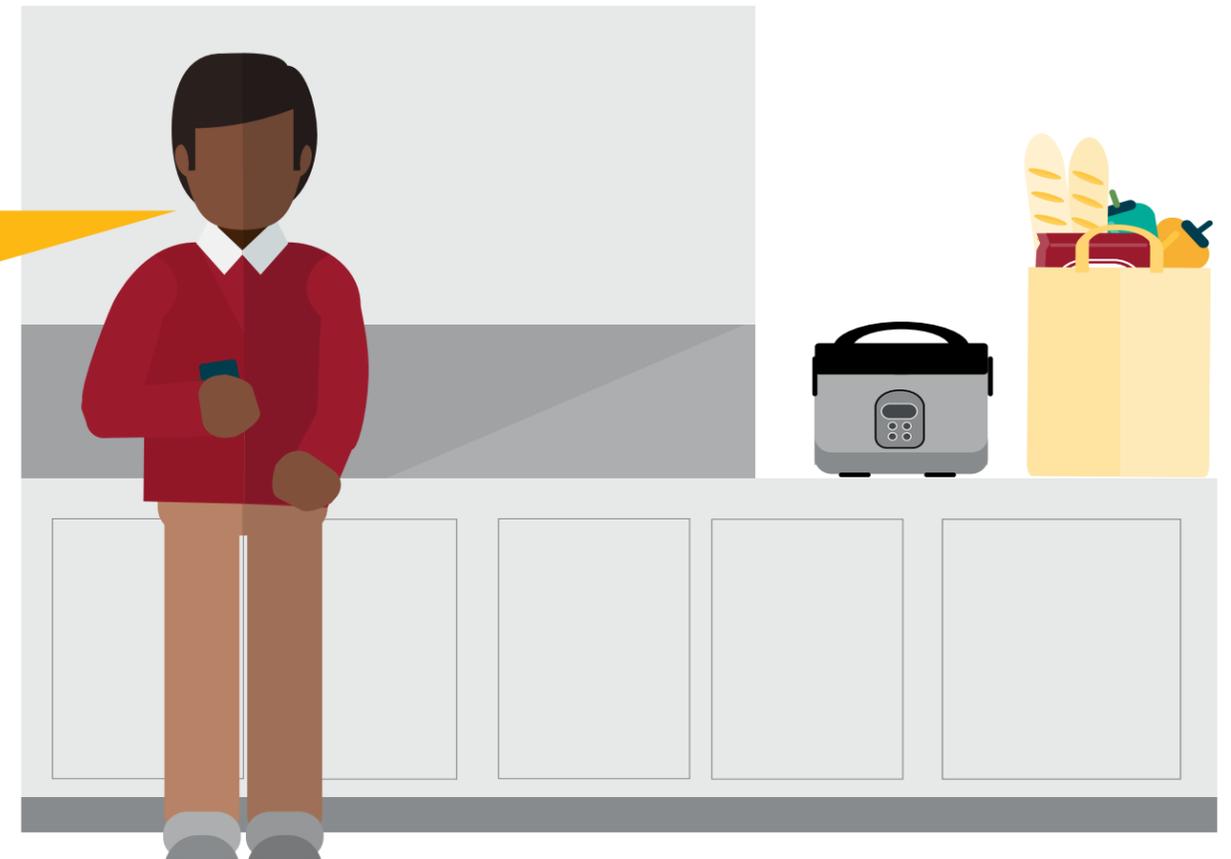


EMPLOYED FULL-TIME



USUALLY READS REVIEWS WHEN SHOPPING ONLINE

THEY'VE COME A LONG WAY WITH APPS. I REMEMBER "WAY BACK WHEN" A YEAR OR TWO AGO THE APPS DIDN'T REALLY HAVE MUCH. NOW THE APPS ARE BETTER THAN THE MOBILE SITE. THE APPS HAVE MADE IT SUPER-EASY TO SEARCH AND MANEUVER AROUND.



## THE JOURNEY:

Doug is shopping for a rice cooker after having experienced one on a visit to his sister. She recommended her specific model, but Doug is shopping based on price, capacity, and review content. He wants to choose the right one for him.

START



Doug's journey starts on his phone, and goes back and forth between his phone and his iPad until it ends. He visits a mass discount retailer website and views description pages for three different rice cookers.



Doug then opens the native app for a different mass discount retailer and looks at two other product pages.

Next, Doug opens the native app for a major consumer electronics retailer – he researches two more rice cookers.



Doug still isn't ready to buy. He dives into the CGC on a warehouse club site and back to the first mass discount retailer. Reading reviews, he learns about three other considerations that weren't yet on his mind: ease of use, ease of cleaning, and having a timer. He has some further product evaluation to do.



*I'VE NARROWED MY SEARCH DOWN TO 3 MODELS... THE PRICES ALL SEEM TO BE ABOUT THE SAME SO I'LL CONTINUE TO RESEARCH AND BASE MY FINAL DECISION ON REVIEWS.*

**FINISH**

Journey Duration  
**2 DAYS**



Doug completes his journey, still on his phone. The consumer content he uncovered during his research validated that his sisters' recommended model would be great for him too. After engaging with a total of four retail options – entirely on mobile – he buys his rice cooker at a mass-retailer mobile site, basing his final selection of retailer on shipping costs and timing.



## THE TAKEAWAYS

- In the end, winning shoppers requires content they trust. They look for lots of reviews and photos to give them confidence to buy.
- Presenting consumer-generated content in a great mobile experience is more important than ever. Apps are making it seamless.

### SHOPPING BEHAVIOR FOR THIS JOURNEY:

IN BAZAARVOICE NETWORK

**100%**

# 3 MEGYN



30-YEAR-OLD MOTHER



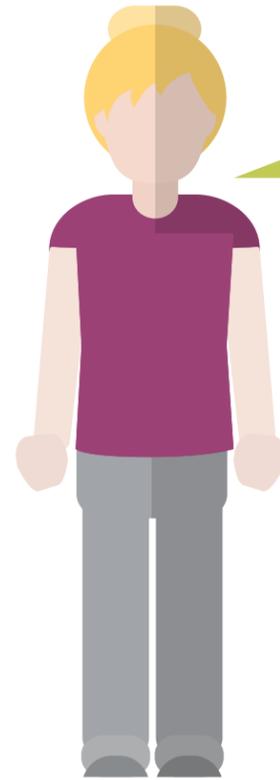
COLLEGE EDUCATED



EMPLOYED FULL-TIME



ALWAYS READS REVIEWS WHEN SHOPPING ONLINE

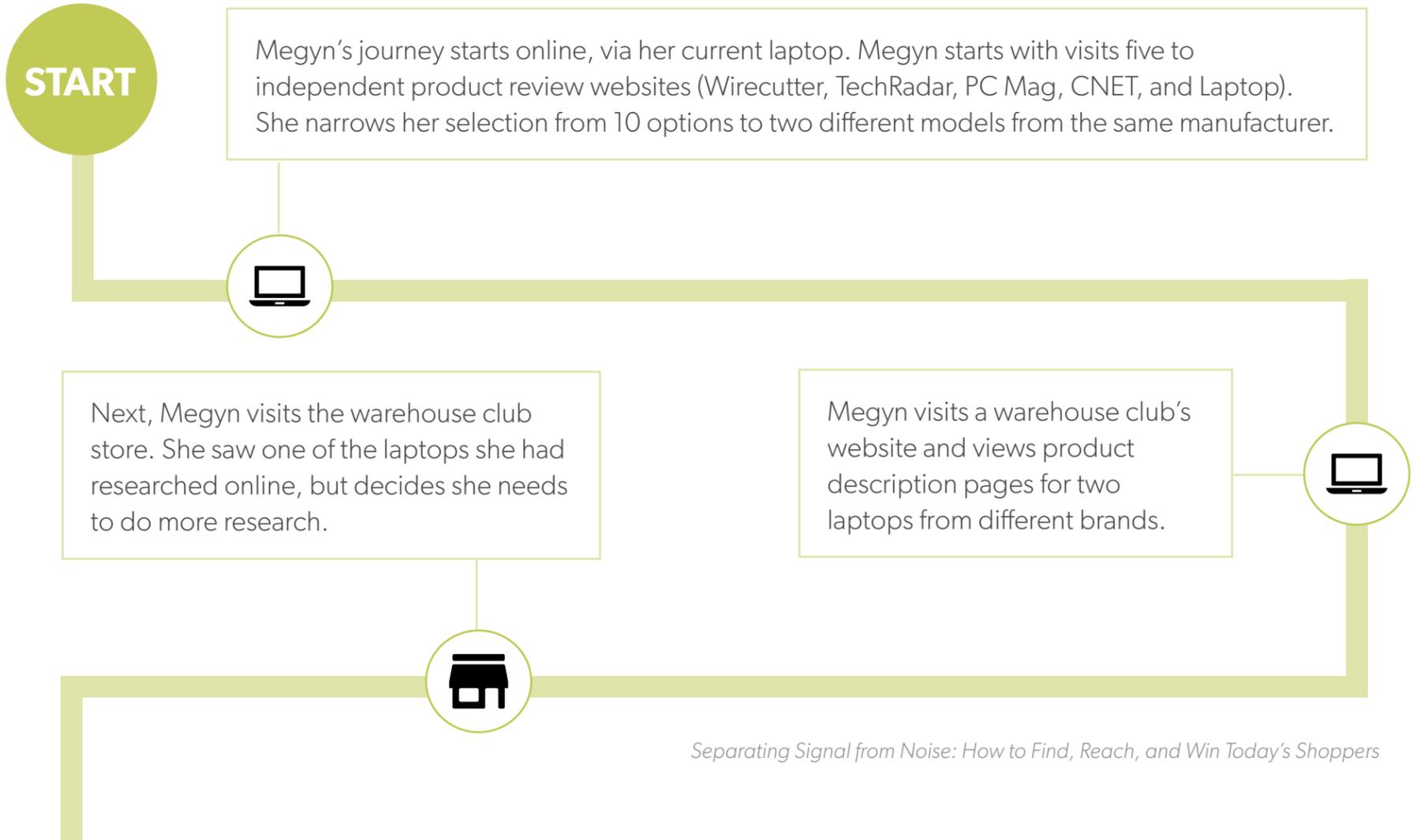


FOR THINGS LIKE TOYS, WE DO A LOT OF MOBILE WHILE IN STORE, OR RIGHT BEFORE WE GO... IF IT'S A HIGHER PRICED ITEM, LIKE THE LAPTOP, I DO A LOT OF MY RESEARCH ONLINE.



## THE JOURNEY:

Megyn is shopping for a new laptop. She knows one brand she likes, but is open to trying new brands. She is shopping on price and features like form factor, processor generation, drive type, and RAM. She has a firm budget ceiling.



At home on her laptop again, Megyn returns to the warehouse club online and reads reviews of four models from three different brands.



Still on her laptop, Megyn bounces to a major consumer electronics retailer site, where she researches another model.

## THE TAKEAWAYS

- Research happens at manufacturer, retailer, and editorial sites.
- This means there is an opportunity for marketers and advertisers find in-market shoppers outside the walls of their own web properties.
- Marketers need to find and reach shoppers while they are researching. Waiting for them to land on your site means you may miss the opportunity to influence them.

*I'M LOOKING FOR TRENDS. I'M LOOKING TO SEE IF A NUMBER OF PEOPLE SAID, FOR EXAMPLE, THAT THE BATTERY LIFE IS HORRIBLE.*

Journey Duration  
**9 DAYS**

**FINISH**

### SHOPPING BEHAVIOR FOR THIS JOURNEY:

IN BAZAARVOICE NETWORK

OUT OF NETWORK

**80%**

**20%**



This time on her phone, Megyn goes back to the warehouse club site and dives into CGC on her two finalists. She discovers content that has been syndicated to the retailer site from the manufacturer and completes her research. Her journey completes in-store, where she purchases the chosen laptop.



# 4 JOHN



29-YEAR-OLD MARRIED MALE



COLLEGE EDUCATED

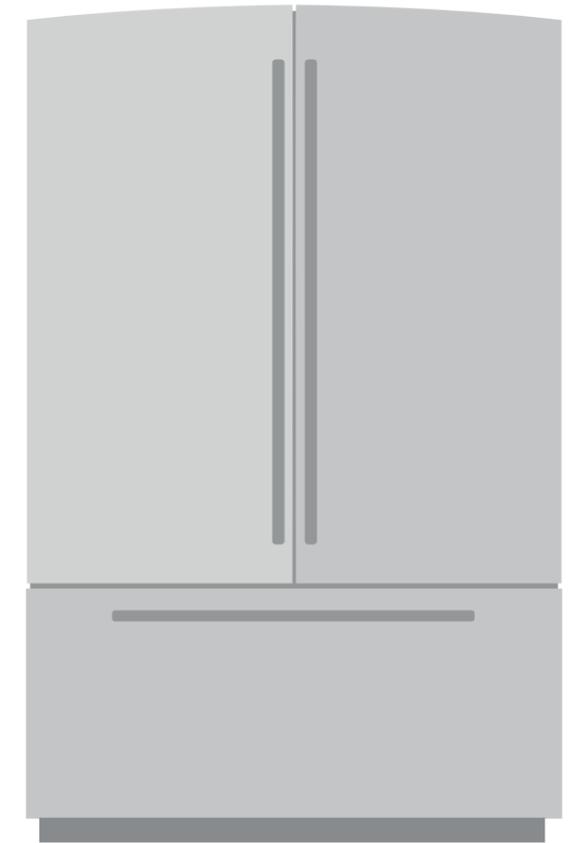


EMPLOYED FULL-TIME



ALWAYS READS REVIEWS WHEN SHOPPING ONLINE

*MOBILE RESEARCH WAS MY FILTER:  
SHOULD I EVEN SPEND MY TIME TO WALK  
IN THE STORE AND SPEND AN HOUR OR  
TWO OF MY DAY, WHEN I CAN REALLY GET  
A PRETTY GOOD IDEA IN 45 SECONDS?*



## THE JOURNEY:

John and his wife recently bought a new home. They haven't moved in yet – but they know they need a new refrigerator. Their new house has an open plan, so they want a French-door model that looks great, in addition to having features like in-door water and ice and overall quality.

John starts with a few brands in mind. He researches models at the mobile sites of two big-box home improvement stores, a department store, and a warehouse store. He has two brands in mind, and his wife suggests a third.

**START**

*TO ME, THE PRODUCT  
PICTURE MATTERS, BUT  
THE ONE I REALLY LIKE  
SEEING IS THE PRODUCT  
IN AN ACTUAL KITCHEN.*



Through conversations with his sister, John discovers an important feature he hadn't considered: a surface that is resistant to fingerprint smears. Also as a result of his conversations with his sister, John expands his search to include a brand he hadn't previously considered.



John continues to research models on websites for one home improvement retailer, one warehouse club, and one department store outlet. He narrows his choices to three models from three different brands, and sets a price threshold. He has an order of preference, but any of the three will do, once he finds one at a price he is willing to pay.

**FINISH**

Journey Duration  
**19 DAYS**

John discovers that his first choice is available at the appliance outlet for a major department store – at a 20% discount from other sites. He already knows from the content he's read at other sites that it's the right choice, so even though there aren't reviews on this site, he visits the store and purchases it in person.

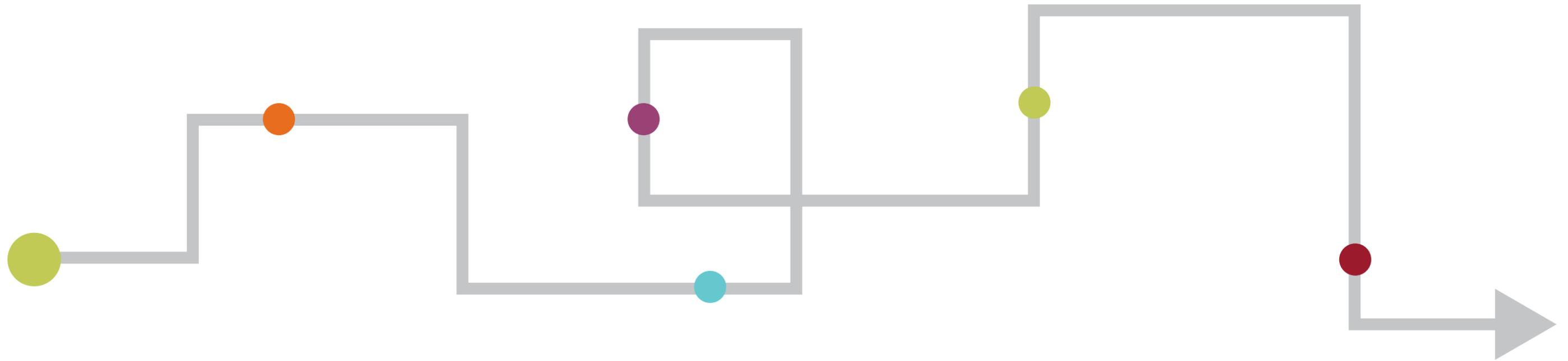


## THE TAKEAWAYS

- Mobile devices are an indispensable and increasingly integral element of shopping.
- People are looking for insights from people like them, who are solving similar problems or have the same purchase criteria.

### SHOPPING BEHAVIOR FOR THIS JOURNEY:





## WHAT THIS MEANS FOR MARKETERS

Lauren, Doug, Megyn, and John confirm a few important truths about how people shop today. Those truths can help marketers make the right strategic choices and focus marketing spend to find, reach, and win shoppers in the moments that matter. We have watched these changes unfold over the last several years, and we all do our best to keep up, changing our strategies, tactics, and investments each year.

**One thing is clear: finding new ways to influence a nearly infinite set of journeys must be at the foundation of marketers' acquisition and conversion strategies.**

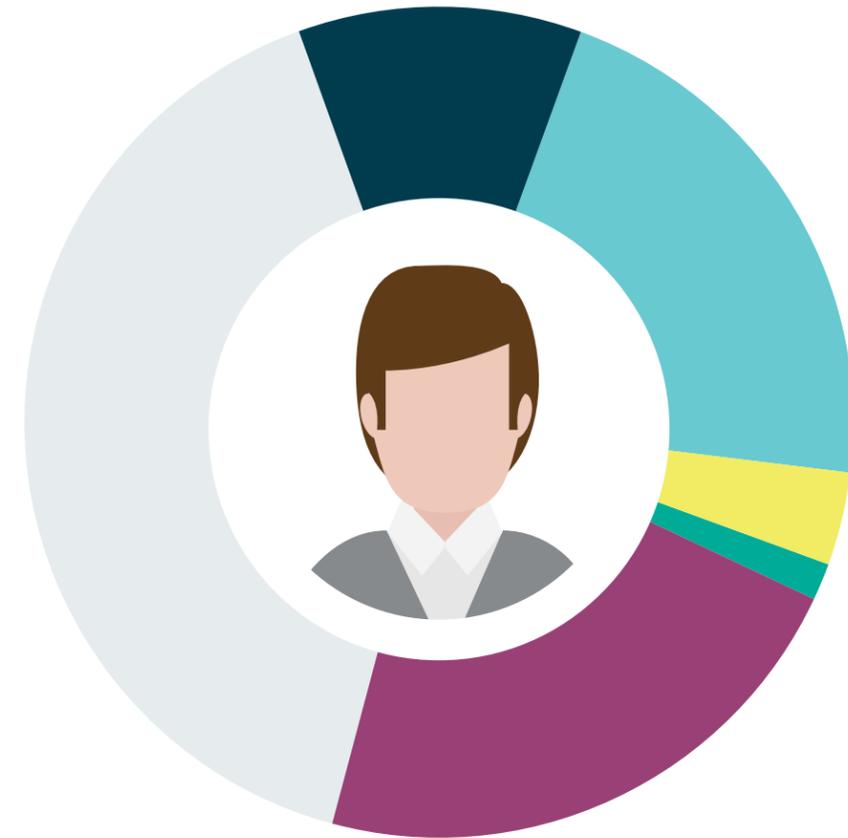
# YOU NEED TO REACH PEOPLE, NOT PERSONAS. THIS REQUIRES BETTER DATA.

Traditional approaches relying on demographics or personas to find in-market shoppers fall short – they waste investment on audiences who aren't really potential buyers, and they miss audiences who are.

"Spray and pray" gets expensive – especially in broad categories. Laptop shoppers like Lauren defy categorization and predictability – and they don't buy that frequently. Mass-market campaigns are profoundly inefficient, but demographic targeting doesn't get you close enough either. And yet, Megyn's research was certainly a buy sign.

And Doug illustrates the missed opportunity in persona-driven approaches – he's made up his mind to buy a rice cooker, but as a middle-aged male, he's not necessarily the most obvious customer for this type of purchase, and a brand that bases its targeting on personas would likely miss him. But once he started researching, he was signaling a lot of intent on numerous web properties.

Actual shoppers give all sorts of signals that they are in market for particular products – signals that are invisible to many people who want to find and reach them. Since so much research happens away from the final point of purchase, marketers struggle to find in-market shoppers early in their process. Even with piles of data in their own warehouses, they struggle to break out of their silos and find consumers earlier in the journey. In fact, our research indicates that only 17% of marketers can see customer behavior beyond their own properties.



That's a problem when you consider how many touchpoints shoppers like Megyn, John, Doug, and Lauren have during the research process. They are doing their research in-store and online, bouncing around among different brands and retailers – and devices.

**TARGET PEOPLE, NOT PERSONAS.** AT BEST, YOUR SILOED DATA OFFERS A PARTIAL VIEW OF SOME CONSUMERS. TO FIND THE CONSUMERS YOU NEED, INVEST IN ADVERTISING SOLUTIONS THAT SYNTHESIZE SHOPPER SIGNALS AND KNOW WHO IS IN-MARKET NOW.

# MOBILE IS THE NEW STOREFRONT. DELIVER A GREAT CUSTOMER EXPERIENCE THERE.

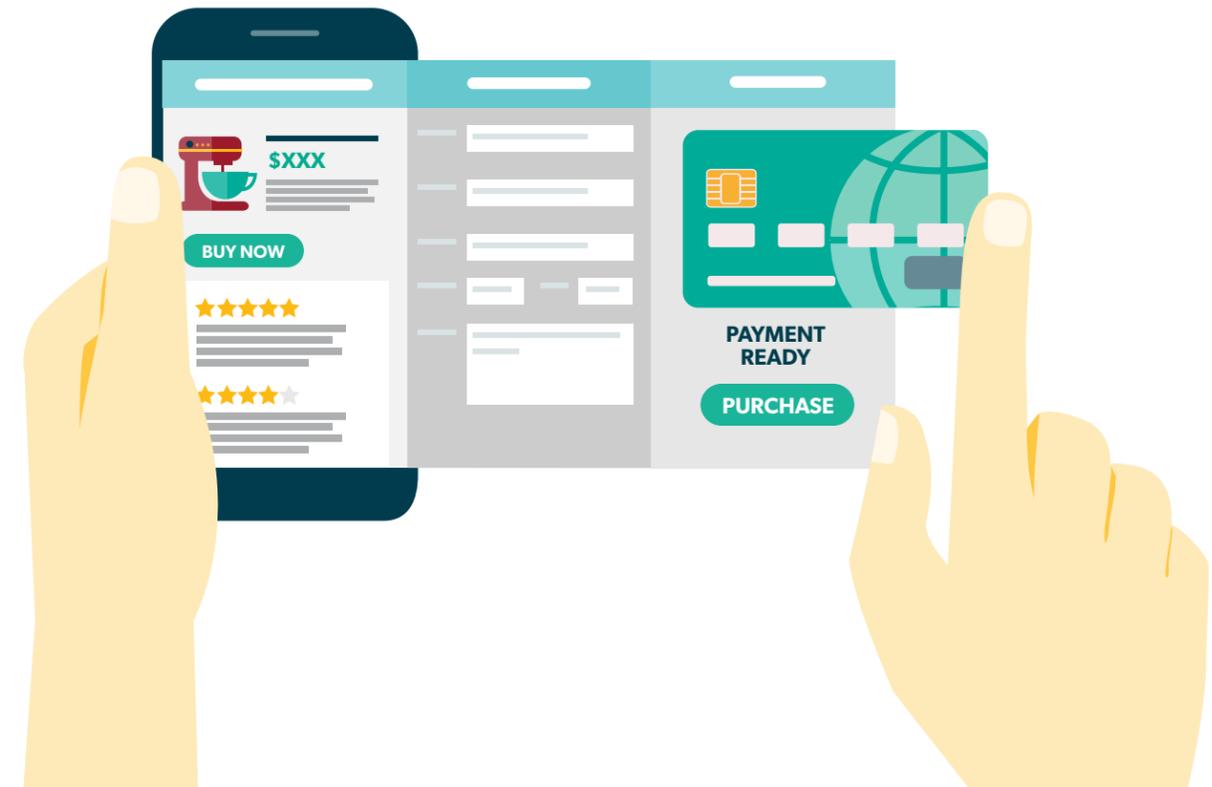
Marketers still tend to think of mobile phones as an immediate tool for simple shopping tasks conducted on the go – price comparisons and inventory searches. But the rise of native payment apps, increased screen sizes, and more satisfying experiences available to consumers on mobile phones today has catapulted them to the default shopping channel of many consumers.

Research from Deloitte (September 2016) indicates that 37% of all retail purchases last year were influenced by mobile device search, discovery, research, or price comparison. Among digital buyers, 60% researched while in-store, and 64% used a retailer's app (ComScore for UPS, Feb 2016). Bazaarvoice research-online, buy-offline (ROBO) [research](#), now spanning more than four and half million transactions, substantiates the importance of online content in the offline shopping experience. Our study indicates that shoppers interact with CGC before 45% of in-store purchases.

Consumers use mobile devices to augment and enhance in-store shopping experiences, and phones increasingly stand alone as the shopping channel of choice for many people. They research, compare, and read consumer content on mobile. Visual content plays an increasingly important role in mobile research too. Social media influences shopping behavior from discovery to purchase – often in real time, while shopping takes place. Even when it's not the last touchpoint – mobile is incredibly important.

Lauren does all her shopping at least partially on her phone. Doug does too, and leverages the more tailored, rich experience available in native retailer apps in some cases. For John, mobile is about saving time researching to narrow his choice set. Megyn, on the other hand, uses mobile both at home and in-store, where she supplements what she can learn by seeing a product in person.

**MOBILE IS EVERYTHING.** DELIVER A RICH, EASY-TO-USE EXPERIENCE FOR RESEARCHING AND BUYING. BUILD ADVERTISING CAMPAIGNS WITH MOBILE IN MIND. USE LOCATION FOR A HIGHLY-PERSONALIZED AND RELEVANT IN-STORE EXPERIENCE.





# TO WIN CONSUMERS, DELIVER TRUSTED CONTENT WRAPPED IN A GREAT EXPERIENCE.

People are deliberate about shopping, even for items you might consider lower-consideration. People weigh purchases carefully against a number of individualized factors. Information is more abundant and accessible than ever before – and shoppers know how to make use of it. Consumer-generated content is an inherent part of the shopping experience, whether the journey concludes online or in the store. Sometimes the research process takes one day, sometimes it takes weeks. There are no reliable rules about which.

And without a good view outside the walls of your own digital properties, you may lack visibility into much of this research process. Now what looks like a quick purchase on your website may be the result of two weeks of reading content and evaluating products. Lauren shopped for her tote for nearly two weeks on several sites before she saw the picture that showed the one that was right.

Having trustworthy content during the research process is critical – it serves numerous purposes. Sure, shoppers look for overall sentiment in consumer feedback, but there is more to it than that. They seek out specific data points that answer their questions. And like Doug, who discovered he should consider how easy a rice cooker is to clean and use, shoppers learn about important product features they hadn't considered before.

Shoppers are looking for insight from people who are “like them” in some way, either because they are solving the same problem or have the same purchase criteria. And importantly, many shopper questions can only be answered with visual content. Lauren was ready to buy after she saw a picture of the tote she was considering “on a real person,” and one with it filled with diapers. Marketers cannot underestimate how smart and diligent shoppers are today.

It's not enough to simply have great content – make it easy to find and use, including in your mobile web and app environments. This is the source of stickiness in a world where consumers hop from site to site during the research process.

**DELIVER CONTENT CONSUMERS TRUST, AT ALL THE MOMENTS THAT MATTER. CONNECT WITH SHOPPERS WHILE THEY ARE RESEARCHING. AUTHENTIC RATINGS AND REVIEWS, QUESTIONS AND ANSWERS, AND VISUAL CONTENT ALL MATTER. MAKE SURE THAT CONTENT IS PROMINENT IN WEB, MOBILE, AND IN-STORE.**

# TO FIND, REACH, AND WIN TODAY'S SHOPPERS, DO THREE THINGS.



## UPGRADE FROM PERSONAS TO PEOPLE.

Start targeting people. Eliminate the guesswork from your targeting and acquisition efforts to find in-market shoppers, when they are in market, even before they visit your site. Bazaarvoice Advertising builds audience segments based on the actual behavior of 160M shoppers.



## MAKE YOUR MOBILE STOREFRONT WOW-WORTHY.

Invest in the most seamless, useful experience you can deliver. Mobile is just as important as in-store or web – whether consumers are researching, web-rooming, or shopping entirely on their phone. Bazaarvoice developer kits make it easy to integrate consumer-generated content in your mobile experience.



## WIN WITH TRUSTED CONTENT.

Consumers are looking for photos, reviews, and Q&A-style content. Make sure they can find it by surfacing it on your site and in the mobile experience. Amplify photos, star ratings, and review quotes in advertising and in-store. Explore how Bazaarvoice Conversations and Bazaarvoice Curations pull these pieces together.

**WE'RE HERE TO HELP. LET'S TALK. ▶**

# METHODOLOGY

For this paper, Bazaarvoice conducted an online shopping diary study of twelve shoppers who self-identified as in-market for products in the Apparel, Consumer Electronics, Home Furnishings or Home & Garden categories, excluding shoppers who were only planning to purchase gifts for others. In addition to the data reported in the diary tool, Bazaarvoice tracked the subjects shopping patterns on multiple devices through the Bazaarvoice Network of more than 2,000 retail and brand websites using their unique IDs. From this study, four shoppers who completed shopping journeys during the defined time period were selected for an additional qualitative interview to better understand their research, consideration, and decision-making process for the tracked purchases. We asked participants to report at various points in the shopping funnel what prompted them to initiate shopping, how many items were compared, how they narrowed their selection, and factors leading to their final decision.

# ABOUT BAZAARVOICE

Bazaarvoice helps brands and retailers find and reach consumers, and win them with the content they trust. Each month in the Bazaarvoice Network, more than one-half billion consumers view and share authentic consumer-generated content (CGC), including ratings and reviews as well as curated visual content across 5,000 brand and retail websites. This visibility into shopper behavior allows Bazaarvoice to capture unique first-party data and insights that fuel our targeted advertising and personalization solutions.

Founded in 2005, Bazaarvoice is headquartered in Austin, Texas with offices across North America and Europe. For more information, visit [www.bazaarvoice.com](http://www.bazaarvoice.com).



[bazaarvoice.com](http://bazaarvoice.com)