

# THE STATE OF RETAIL 2019





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**BRETT HOUSE** SVP, Growth

### Letter From the Author

#### WELCOME TO THE STATE OF RETAIL 2019

We're excited to bring you this labor of love, a deep analysis of the most predictive drivers of retail brand building and customer acquisition. We've surveyed nearly a thousand people and hundreds of retail executives to understand how consumers find, trust, and inevitably choose retail businesses. And the results-in many cases-are fascinating.

In short, consumer behavior has changed and the very real impact on the retail world has been transformative. We're in an age of digital disruption. It's largely mobile, visual, and increasingly voice search driven. People are moving in droves towards smart and IoT devices as well as search, social, and peer-review media to learn about retailers. In fact, they're in large part leaving traditional media and even websites behind in favor of third-party digital profiles.

These digital profiles, like our own individual social media profiles on sites such as LinkedIn, Facebook, and Instagram, are increasingly defining retail brand identity in the eyes of consumers. They live across a variety of media channels, and every business location in a brand's portfolio has them.

As you read further, you'll learn about the profound impact this has on a brand's ability to build awareness, customer intent, and purchase consideration. From smart devices to voice search, customer reviews to real-time product feeds, consumers expect instant, relevant information at the point of discovery. While it might sound simple, it's easier said than done.

Are you ready? I know I am. Enjoy the report.

Sincerely,

### **>** synup

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### Introduction

There's been a seismic shift in how people find and choose retail businesses. Our research shows that people are judging, selecting, and sharing information on retail businesses based on the quality and trustworthiness of their digital profiles across devices and media channels.

Retail discovery and selection is driven by smart devices—from mobile devices to internet of things (IoT)—across a variety of media touchpoints including Google, Facebook, Yelp, and voice search assistants like Siri and Alexa. Respondents made it clear that they are less reliant on traditional media and websites to find and learn about retail businesses. They require instant gratification with relevant and engaging business information and content.

In order to attract, acquire, and retain customers across store locations in this complex digital environment, retail brands need to focus on three key areas:

- Managing brand presence across business locations, devices, and media channels
- Optimizing the business content critical to driving the customer path to purchase
- 3 Monitoring customer reviews and ratings across channels to improve brand reputation

To gather these insights, we analyzed 5 major retailers across 560 locations, and surveyed 837 people and 288 business executives to better understand how consumers find, trust, and choose retail brands.



### **Brick-and-Mortar Still Matters**

It may come as no surprise that local retail continues to play an important part in people's lives, despite the seemingly ubiquitous growth of ecommerce. A majority of respondents (56%) report frequently shopping at local retailers, with very few (2%) citing that they've abandoned shopping locally. See Figure 1.0.



Survey question: How often do you shop at local retail stores? Survey sample: 837 consumers and 288 retail business executives. Source: Synup, September 2019

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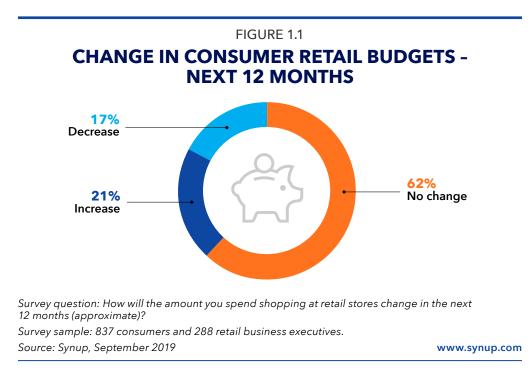


New and established retail brands need to think and act locally now more than ever.

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Clearly, local retail still has clout. In fact, 62% of survey respondents say they will not change the amount they spend on shopping at local retailers in the next month and 21% indicated their local retail patronage will even increase.

New and established retail brands need to think and act locally now more than ever. To capture this consumer demand (see Figure 1.1), as we'll see in the next section, it's important to be found across the various media channels and devices now available to local audiences.



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### The Rise of Digital Profiles

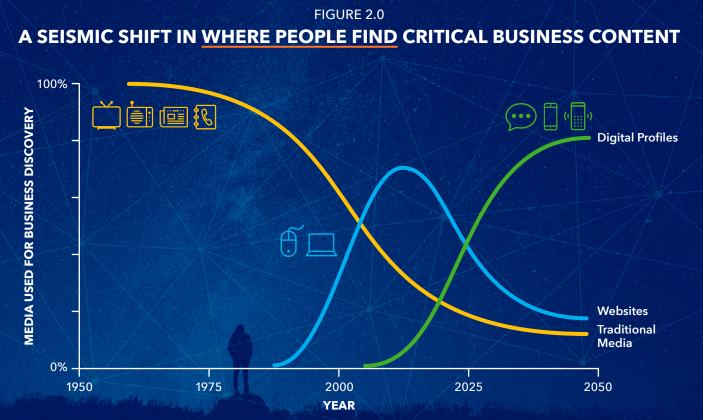
To succeed in today's hyper-competitive retail environment, retail marketers need to adapt to big changes in consumer behavior and how they find and choose businesses. People are less reliant on websites and traditional media channels such as direct mail, local radio, or the yellow pages to find and choose retailers. Consumers are increasingly discovering and interacting with retailers' digital profiles across search, social, and other digital media channels.

These business profiles largely represent a retail brand's identity today. Think of your business profile as comparable to your own personal profile on sites like LinkedIn, Facebook, Instagram, or Snapchat. It's ubiquitous. It's influential. And it's instantly accessible by everyone. Our analysis of over 165,000 businesses across the US confirms this trend. We see five times the amount of direct customer visits to a business's digital profile than its website.

It may come as no surprise that this trend is largely being driven by device saturation. People are moving in droves towards smart devices and a variety of key media channels-such as voice search and social media-to learn about, select, and share feedback about retail businesses. Multi-location retail brands need to think and act digitally in order to zero in on consumer intent. See Figure 2.0 below.

Consumers are increasingly discovering and interacting with retailers' digital profiles across search, social, and other digital media channels.

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Put simply, potential consumer touchpoints have multiplied, and the speed at which people expect engaging and consistent retail business information has increased. We live in a world where instant gratification is the norm, and retailers need to be omnipresent in order to effectively acquire and attract new customers. Let's take a look into the findings to see just what that means.

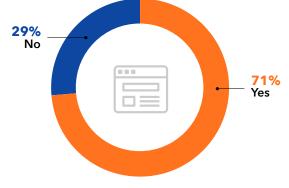
We found that 77% of respondents placed significant weight on a retailer's visibility and accuracy across search and social media channels. The accuracy of your basic digital retail information should be an easy thing to manage, yet 71% of respondents reported experiencing inaccurate retail information when searching for a retail store. See Figure 2.1.

Additionally, our analysis of nearly 560 stores across four big retail brands in the US showed that approximately 50% of their digital profiles were missing from the 50 media channels people use most to find businesses (Google, Facebook, Bing, Foursquare, Yelp, etc). See Figure 2.2.

Each of these inaccuracies represents a potential lost customer and lost revenue. When these local stores did appear on Google, which owns the lion's share of all online searches, they had a 52% error rate. Even when they are present, their most basic contact information is largely inaccurate.

#### FIGURE 2.1

#### PERCENTAGE OF PEOPLE FINDING INACCURATE RETAIL INFORMATION ONLINE



Survey question: Have you ever had an experience discovering inaccurate business information when searching for a retail store? Survey sample: 837 consumers and 288 retail business executives.

Source: Synup, September 2019 www.synup.com





Respondents indicated that while they generally trust the accuracy of the retail business information they find online, only 3% of those surveyed think this information is extremely accurate. Among our respondents, 15% don't trust the accuracy at all, and 37% think the information is only moderately accurate.

Though it seems relatively straightforward for a retailer to distribute correct business information across the various media and device touchpoints, the reality is much harder. A large majority of the retail brands analyzed have gaps in their media presence (e.g. across search, social media, customer review sites, map apps, and voice search) or are showing inaccurate or inconsistent business information and content. See Figure 2.3.

## A large majority of the retail brands analyzed have gaps in their media presence.

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Survey question: How accurate-on average-is the information you find when searching for store information (online/digital)?

Survey sample: 837 consumers and 288 retail business executives. Source: Synup, September 2019

To further illustrate this point, we analyzed 17,000 retail banks across the US. Banks, like other retail verticals, suffered the same challenges when presenting accurate business profiles. Their information was inaccurate 69% of the time on Google alone. Considering that Google accounts for 92% of searches in the US, this represents a lost opportunity. Nearly 73% of retail bank business profiles were missing from the 50 media channels people use most to find businesses (Google, Facebook, Bing, Foursquare, Yelp, etc). Our analysis of over 1,000 restaurants showed similar trends. Nearly 60% of their business information was inaccurate on Google, with 50% of their business profiles missing.



These insights across retail categories, while sobering, make it clear that there is a tremendous opportunity for brands to not only increase their local audience reach, but to make a better impression on potential customers by ensuring their core business information is, at the very least, accurate.

To better understand consumer preferences around retail business research and selection, we asked survey participants to rank the importance of various retail information sources. To find and learn about new stores, nearly all respondents (85%) reported that word-of-mouth recommendations remain extremely important. Much of this is due to the influence and ubiquity of social media, which people largely use to share information with their friends and family. That being said, it's encouraging to see that direct peer interactions continue to play an important role in our day-to-day lives, whether face to face or via social media.

We also found that 78% of respondents consider websites important in retail selection, which is likely indicative of an ecommerce presence versus brick-and-mortar alone. Additionally, 71% consider digital maps (e.g. Waze, Apple Maps, Google Maps) important, which certainly points to a strong potential conversion event. Generally, this is the last step taken before a person steps inside a retailer's doors. See Figure 2.4.

Social media is important to business selection according to 48% of people. One could surmise that social media facilitates word of mouth recommendations, which may be reflected in the high results reported for that category. More importantly, 35% of respondents think voice search is critical to retail business selection. This category is growing due to smart device penetration, including smart speakers, IoT devices, and connected cars. Considering the relative youth of the voice search category, this is an impressive number that points to growing adoption and the potential importance of digital assistants as a primary driver of retail search and selection.

# **35%** of respondents think voice search is critical to retail business selection.

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Nearly half (49%) of respondents consider digital advertisements on mobile, tablet, and computer devices important to their selection of retailers. Other research around retail store discovery on search engines reinforce this fact. Google has noted that 46% of all searches on Google have a "local intent,1" and that 97% of consumers have searched online to find a local business.<sup>2</sup>

<sup>&</sup>lt;sup>1</sup> "Did Google Say 46% Of Searches Have Local Intent?" Search Engine Roundtable. Schwartz. October 17, 2018.

<sup>&</sup>lt;sup>2</sup> <u>"97% of Consumers Search For Local Businesses."</u> Adaptive Marketing. May 2, 2018.

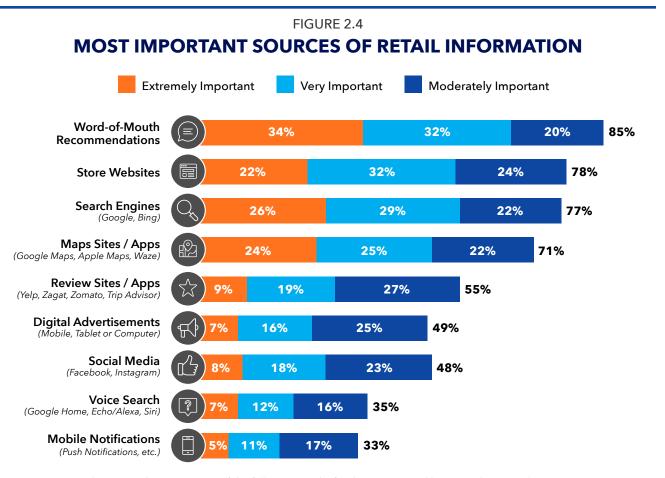


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Mobile notifications are top of mind for a third of all respondents (33%), which points to the growing importance of geo-fencing as a mechanism by which retailers can engage with people based on their proximity to a specific store. For those of you unfamiliar with geo-fencing, it's a dynamically generated radius around a point location based on a mobile device. Simply put, this enables you to reach specific audiences who have opted-in to receive messages—like mobile app notifications when they are in striking distance of one of your locations.

This can be leveraged for communicating highly targeted special offers and other promotions while a person is actively shopping. Additionally, this information is helping retailers better measure what promotional tactics are generating the most foot traffic and in-store purchases. This degree of individual-shopper sales attribution has been largely absent from retail marketing until recently, and we see it as an increasingly important retail marketing effectiveness practice. See Figure 2.4.

## Individual-shopper sales attribution has been largely absent from retail marketing until recently.



Survey question: Please rate the importance of the following media for discovering and learning about retail stores. Survey sample: 837 consumers and 288 retail business executives. Source: Synup, September 2019

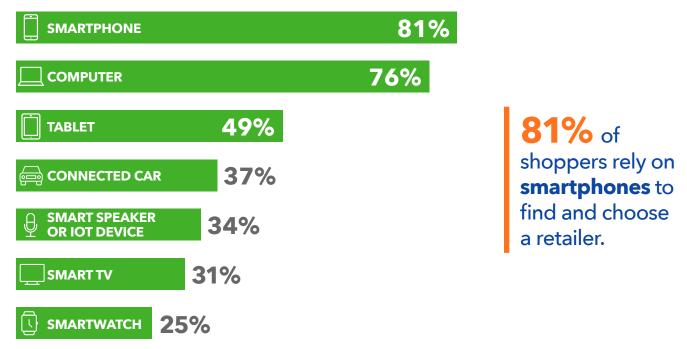
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Retail business search and selection is driven by smart devices across the board as evidenced in Figure 2.5 below. The most important device in the retail store selection process is the smartphone, according to 81% of respondents. This is followed by computers at 76%. Even more interesting is how important other smart devices are becoming to retail shoppers: 37% consider their connected car and/or its navigation system important to choosing retailers, and 34% rank their digital assistants and/or smart speakers (e.g. Alexa, Google Home, Siri, Cortana), which is consistent with the aforementioned voice search results.

#### FIGURE 2.5

#### **MOST IMPORTANT DEVICES FOR CHOOSING RETAILERS**



Respondents ranked the following devices as highly important

Survey question: Please rate the importance of the following devices for discovering and learning about new retail stores. Survey sample: 837 consumers and 288 retail business executives. Source: Synup, September 2019 www.synup.com

Smart TVs and smartwatches have–arguably–reached a "here-to-stay" point of consumer adoption. It might come as a surprise to many readers that nearly a third (31%) rank their Smart TV as an important device when choosing retailers. Interestingly, this number is equal to the number of Smart TVs now present in US households. According to the latest Leichtman Research report, 32% of all TVs are now connected Smart TVs. For context, in 2017, Smart TVs accounted for 24% of all TVs in US homes and only 7% in 2014.<sup>3</sup> It appears that Smart TVs encourage active user interaction more akin to computers and smartphones versus the passive viewing associated with traditional televisions. Retail brands should consider adjusting their television advertising tactics to accommodate this rapidly growing television experience.



Device and media proliferation has had a big, if not transformative, effect on retail marketing.

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Smartwatches were important to retail store selection among a quarter (25%) of respondents. It's our estimation that mobile notifications will play an important role in smartwatch marketing going forward. This device type, while less immersive than its larger counterparts, lends itself to alerts and notifications. Combined with geo-fenced audience data, this could be an effective channel for driving and measuring foot traffic and purchases among active local shoppers.

Device and media proliferation has had a big, if not transformative, effect on retail marketing. Business profiles surface across a dizzying array of media channels and smart devices. As we've seen, 60% of searches today are mobile and approximately 76%<sup>4</sup> of smart speaker owners report searching locally every week. Capturing and converting this local consumer intent is understandably difficult.

# To be truly omnichannel, multiple-location retailers need to think and act locally.

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To be truly omnichannel, multiple-location retailers need to think and act locally. Getting their basic business information right is a critical first step, but the bigger opportunity lies in their ability to meet the needs of customers who expect instant, relevant experiences in ways that have radically shifted in the last few years.

<sup>4</sup> "Voice Search for Local Business Study." BrightLocal. Murphy. April 26, 2018.

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# From Business Content to Customer Acquisition

The previous section largely covers "where" people find and engage with businesses, from the media channel like social or search to the device they use to begin the process. Our next area of analysis takes a deep dive into "why" people choose retail businesses once they've been found. We sought to understand what retail business information and content is most important to customer acquisition. As detailed in the last section, people expect instant, consistent, and accurate information from retailers regardless of device or media channel. It turns out they expect to see a wide range of retail business content as well. It's critical to a brand's ability to drive consumer intent and purchase consideration. Let's take a look at the data.

Once a retailer is discovered, 94% of respondents identified the ability to view immediately available product inventory as critical to their ability to patronize the retailer. Product facts (quality, materials, brands sold) was seen as important to business selection by 87% of respondents. Up-to-date pricing information is important to even more people (89%). An overwhelming majority of respondents (over 80%) see a wide variety of business content as key to retail business selection as Figure 3.0 illustrates.

From special promotions and special offers to customer reviews and ratings, retailers need to curate and deliver a wide range of content to attract and convert customers. Showing people relevant content catered to their individual buying experience–and understanding which content is having the biggest impact on retail foot traffic and purchase–is becoming imperative to retail success.

Retailers need to speak the visual language of the Instagram generation.

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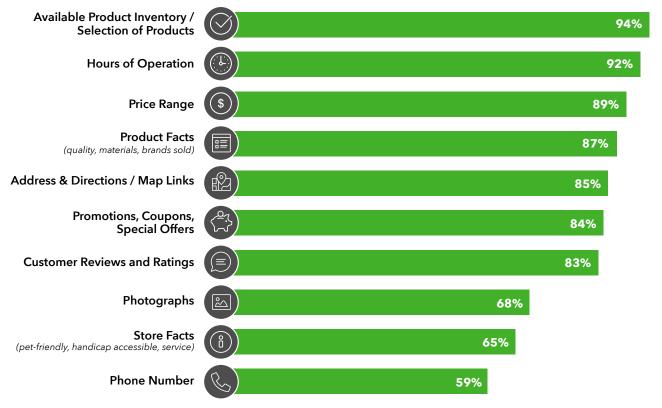
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FIGURE 3.0

#### **CONTENT IS CRITICAL TO ACQUIRING RETAIL CUSTOMERS**

Respondents ranked the following business content as highly important



Survey question: Please rate the importance of the following information when choosing a retail store. Survey sample: 837 consumers and 288 retail business executives. Source: Synup, September 2019

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Respondents made it clear that peer reviews and ratings were key to their retail decision-making process. We found that 83% of respondents think customer reviews and ratings are major drivers in making these decisions. Our research also confirmed the fact that consumer intent is largely influenced by images, as 68% of respondents reported photographs as important when choosing a retailer. Photos and videos are the stuff that makes Instagram, Facebook, and Snapchat tick, and this social media behavior is having a profound impact on business selection. Retailers need to speak the visual language of the Instagram generation. As the saying goes, a picture is worth a thousand words.

Respondents also made it clear that retail store facts and features are important decision-making criteria. We found that 59% expect to see if you offer free WiFi, are handicap accessible, or have free parking.

What's clear is that people need to be armed with enough relevant business content to make retail choices. This content must be timely and aligned closely with their path-to-purchase in order to best meet their expectations and-resultantly-improve customer acquisition results.

Retail business content is critical to a brand's ability to drive consumer intent and purchase consideration.

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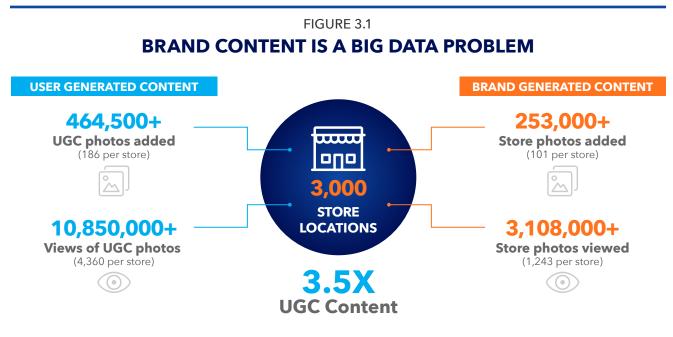


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Now that we've covered the brand content most important to driving retail consumer intent and purchase consideration, let's look at another content category, user generated content (UGC). This is generally larger in volume and harder to control than brand generated content. Today's consumers have unparalleled publishing power with instant access to far-reaching and influential social media platforms. UGC can be produced anywhere and at any time. Retail brands need to take a more proactive role in monitoring, curating, and managing this content to ensure they're delivering the best customer experiences possible across all their business locations.

UGC is a huge opportunity, but also a huge risk, especially in the context of questionable content that threatens brand safety and brand reputation. As an example, one of our retail clients saw nearly 500,000 user-generated photos added in 90-days across 3,000 business locations on Google My Business (GMB). This amounted to 3.5 times the number of photos the brand was able to generate. This is simply one type of content on a single media channel, and illustrates just how large a content challenge retail brands face, especially when you consider the huge number of content types and media channels we've discussed here. Like big data, retailers are now faced with a big content problem. See Figure 3.1 below.

Like big data, retailers are now faced with a big content problem.



Source: Synup, September 2019

www.synup.com

Now that we understand the types of content people view as critical in their path to purchase, it's important to understand what sources they trust the most. Only 35% of consumers trust the business information and content presented on a retail website. This further illustrates the waning importance of website content in the eyes of shoppers. Interestingly, 54% of the 288 retail executives we surveyed think people trust their website content. This difference in trust between business executives and the people they serve illustrates that retail brands haven't entirely adapted to the changes in consumer behavior. People are rapidly moving away from website content towards third-party digital profiles, and their lack of trust in brand websites reflects that.

In terms of consumer trust, word-of-mouth leads the pack. We found that 66% of people trust word-of-mouth recommendations, which outpaces any of the other categories we analyzed. An even larger majority of retail executives felt the same way, with 89% believing word-of-mouth was a very trustworthy source of business information.

As for the other categories, such as social media, which is considered very or extremely trustworthy by only 19% of respondents, consumers lean heavily on their peer group for retail suggestions. External sources of information such as retail websites, social media chatter, and online customer service (e.g. chatbots) are viewed with varying levels of suspicion. These results illustrate just how high consumer expectations have come when it comes to relevant and trustworthy information about a retailer. See Figure 3.2 below. People are rapidly moving away from website content towards third-party digital profiles, and their lack of trust in brand websites reflects that.

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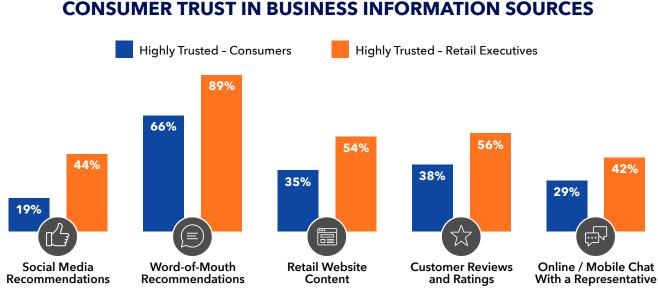


FIGURE 3.2

Survey question: Please identify your level of trust in the following information about retail stores. Survey sample: 837 consumers and 288 retail business executives. Source: Synup, September 2019

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### Challenges & Opportunities in Reputation Management

In our largely connected digital world, consumers have incredible power to influence a retail brand's reputation. As we detailed in the last section, user generated content can be easily created and distributed far and wide at the click of a button. Ratings and reviews fall in this bucket, and arguably, have more sway on purchase consideration than any other factor outside of peer provided wordof-mouth recommendations. On the one hand, negative reviews and ratings can threaten brand reputation and diminish customer acquisition potential. On the other, positive reviews play a big role in patronage. In fact, 82% of respondents won't consider retail business with fewer than 3 stars (on review sites like Google, Yelp, Zomato, and Zagat). In fact, 29% of people will only choose retailers with 4 or more stars. Ultimately, these discerning customers are looking for superior experiences and won't choose an establishment that fails to meet the quality bar of past visitors. See Figure 4.0 below.



Survey question: What is the minimum star rating a retail store needs to have for you to consider choosing it?

Survey sample: 837 consumers and 288 retail business executives.

Source: Synup, September 2019

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It's critical for retail brands to manage customer ratings and reviews across a variety of media s<mark>ources for all of</mark> their business locations.

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The challenge for retail brands lies in managing customer ratings and reviews across all of the available media sources customers have at their fingertips. It's a tall task that requires a command-and-control center for reputation management, which is increasingly becoming a core part of the retail marketing stack.

REVIEWS

I gave 1 star on the service and 3 stars on the selections.

ABC Women's Wear

2.0 \*

Clothing store in Columbia, Maryland • Open

OVERVIEW

GOOGLE REVIEW SUMMARY

Interestingly enough, star ratings influence consumers' interests in "going the extra mile" to support a business that may be further away. As we've seen in our earlier research, 69% of people would travel farther to a business with a 4-star rating than a closer retailer with a lesser rating. Of the business executives we've surveyed, 63% stated that reviews contributed significantly to in-store visits.<sup>5</sup> It's important to note that 46% of respondents said they aren't compelled to review a business unless it leaves a positive or negative impression on them. Thus, people are generally only leaving reviews if their experience was either very good or very bad. As much as this might not be reflective of the general customer population, retailers have the opportunity to better manage, respond, and even generate more reviews, thereby shifting the playing field in their favor.

Fortunately for retail brands, there's never been a better time to manage the total consumer journey from initial awareness through purchase and customer loyalty. By better managing their multimedia presence, optimizing their content for maximum impact, and improving their responsiveness to reviews across channels, brands can make their brand building and customer acquisition efforts much more effective.

<sup>&</sup>lt;sup>5</sup> "How Online Reviews are Destroying Your Local Business (or Helping it Flourish)." Synup. Annadurai. April 2, 2019.

### **Concluding Remarks**

As this report has outlined, today's largely digital consumers require a different marketing approach than many, if not most, retail brands are accustomed to taking. There's been a lot of chatter about omnichannel marketing over the last few years, yet most of it misses the mark for retailers with multiple locations or service areas. One of the persistent challenges faced by these types of organizations is bridging the gap between their national (or global) and localmarketing strategies.

National advertising, while great for brand awareness building, does very little to help retail brands acquire and retain customers in their local markets. Without being easily discoverable-in a consistent and engaging way-across various media channels and devices available to local audiences, retailers have lost the omnichannel race before it even began.

As this report makes clear, consumer behavior has changed, and retail business discovery and selection has changed along with it. Consumers visit digital profiles across sites like Google, Bing, Waze, and Facebook five times more than they do corporate websites. Think of the last time you visited the website of a local retailer (e.g. not ecommerce). If you're like most people, you rarely do.

Business profiles surface across a dizzying array of media channels including traditional search, voice search, social media, review sites, travel sites, maps, and chatbots. Additionally, an overwhelming majority of searches today<sup>6</sup> are mobile, and approximately 76% of smart speaker owners report searching locally every week.<sup>7</sup>

But it's what consumers do after they perform the search that is interesting. Approximately 88% of consumers searching for local businesses on mobile devices want to take an action–like visiting a store–within 24 hours.<sup>8</sup>

Retailers with multiple locations need to get at the heart of consumer intent by showing engaging local content to a prospective buyer at the point of discovery, when purchase intent is at its highest. This requires tighter controls over customer experience and the journey from discovery to the point of conversion. It's about connecting the dots between national advertising and local customer acquisition.

To do this, retail brands need to better leverage and optimize their data and content to match the needs of customers regardless of business location, media channel, or device. By taking these steps, retail marketers can have a real, sustainable, and measurable impact on customer experience and sales at the local level, where it matters most.

<sup>&</sup>lt;sup>6</sup> <u>"Mobile search - Statistics & Facts."</u> Statista. Clement. September 10, 2019.

<sup>&</sup>lt;sup>7</sup> <u>"Voice Search for Local Business Study."</u> BrightLocal. Murphy. April 26, 2018.

<sup>8 &</sup>quot;88% of consumers making local searches from a mobile device take an action, such as calling a business, within 24 hours!" Engage121. Ernst. June 20,2018.



### About The State of Retail 2019

### Mission

*The State of Retail 2019* is an objective source of information that seeks to help retail brands more quickly adapt to the most pressing marketing challenges they face to improve bottom line results across all their business locations.

### Methodology

#### **SURVEYS**

We surveyed and interviewed a large pool of retail consumers and retail executives. Individual survey data and participant lists are held in strict confidence.

#### SURVEY ADMINISTRATION AND SAMPLE

- Consumer Survey US consumers who frequent retail stores
  - » The survey fielded from May 31, 2019 to June 4, 2019
  - » The survey was completed by 837 total respondents
- B2B Survey US-based retail executives, director-level and above
  - » The survey was fielded from June 26, 2019 to July 7, 2019
  - » The survey was completed by 288 total business executive respondents

#### **MEDIA ANALYSIS**

A team of Synup data scientists analyzed the accuracy and consistency retail business profiles across 50 major media channels (e.g. Google, Facebook, Yelp, Bing) for 559 retail business locations representing 5 global retail brands.

#### **RESULTS INTERPRETATION**

- The margin of error for this survey is 4% at a confidence level of 96%.
- For ease of viewing, the results displayed in Figures within this report are rounded to the nearest whole percent.



### Lead Author

**Brett House** is the Senior Vice President of Growth at Synup. He has over 15 years of experience in the media, marketing and measurement space.

Previously, House was a Vice President at Nielsen. He spent 4.5 years transforming eXelate, a martech start-up, from a data-as-a-service (DaaS) product into a highly successful enterprise SaaS business acquired by Nielsen. Post acquisition, he launched the Nielsen Marketing Cloud, the Nielsen Auto Cloud, the Nielsen DMP and Nielsen AI across US, EU and APAC markets.

### About Synup

Synup, the leading Intent Marketing Cloud, transforms a brand's ability to deliver relevant and trustworthy business content across all locations, devices, and digital media channels. Brands can now analyze and optimize how consumers engage with their businesses—from reviews to chatbots, videos to voice search, menus to product recommendations—with an easy-to-use SaaS platform. Synup clients can adapt their local business content and information—on the fly—to match consumer buying behavior. This increases local brand awareness, customer acquisition, and loyalty.

Today, thousands of companies use Synup to drive better business results. Synup is headquartered in New York City with operations in APAC, EMEA, Australia, Canada, New Zealand and the UK. Learn more at www.synup.com.

#### **BE FOUND. BE TRUSTED. BE CHOSEN.**





**BE FOUND. BE TRUSTED. BE CHOSEN.**