



Reviewbox

# WINNING THE DIGITAL SHELF

HOW TO MAXIMIZE YOUR SHARE OF VOICE

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Source: McKinsey & Co.,  
June 2017, The New  
Battlefield for Marketing  
Led Growth

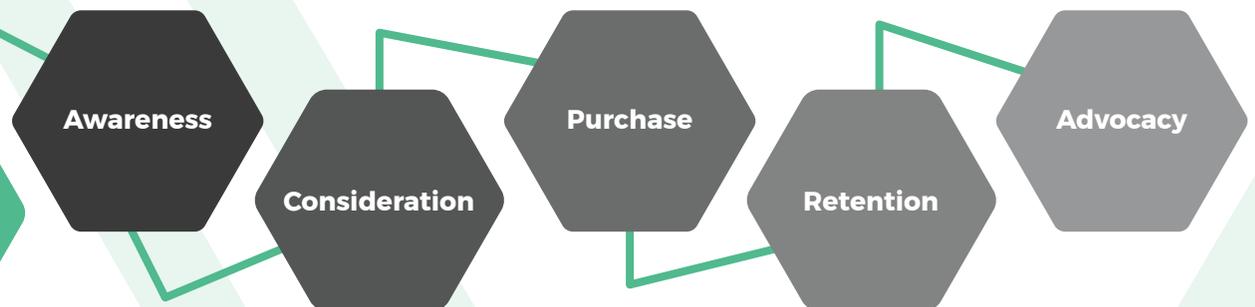
# E-Commerce & the Consumer Journey

The consumer journey today is more complex than ever before. With the rise of digital technology and e-commerce, consumers' approach to shopping has been revolutionized. Through social media and smartphones, customers possess the ability to compare products, find the best deals, and make their opinions known. This has fundamentally altered the decision journey; in an instant, a shopper can move from awareness to purchase.

Traditionally, this journey was widely believed to consist of five steps: awareness, consideration, purchase, retention, and advocacy. It was a linear process in which the customer would begin with a set of potential brands,

reducing the number at each step. Today's journey is far different. McKinsey & Co. assert that this decision process is now circular. It begins with a customer's initial consideration set, which is based on brand perceptions and exposure to recent touch points. The customer then begins to add and remove brands as they gather information, selecting a brand at the moment of purchase. After doing so, the customer builds expectations based on this experience that will influence the next decision journey until developing brand loyalty. With 13% of today's consumers being brand loyalists, brands must capture consumers at the awareness and consideration phases of the journey.

## The Traditional Buyer's Journey





**55% of consumers now begin their online shopping trips on Amazon.com**

Bloomreach. (2016) State of Amazon

**46% of current Prime members make a purchase on Amazon at least once a week.**

Chanda, R. (2018, June 26). Nearly Half of U.S. Households are Now Amazon Prime Subscribers. EMarketer

# Share of Voice

As brands seek to understand and grow their awareness with consumers, it's essential that they first evaluate how they stack up to the competition. Just as brands in grocery stores aim to capture eye-level placements and end caps for their products, online retailers desire to be the first in the search results. If brands can track their location on the “digital shelf” relative to competitors, they can best establish a strategy to make their products seen by customers.

For a brand to be seen, it needs to be front and center in a consumer's product search. The top of Amazon's search results is prime real estate, and brands lucky enough to reside in these spots will capture the majority of sales. 57% of users spend their page viewing time above the fold.\* 70% of customers will never even click past the first page of search results, and 35% of

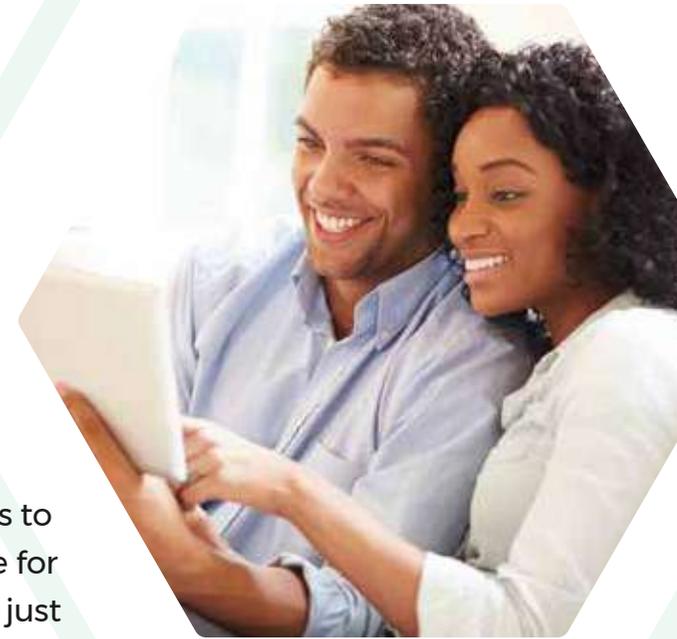
**57% of shopper viewing time is spent above the fold**

them will click on the very first product featured. 64% of clicks will be on the first three items displayed in the search results.\*\* Needless to say, location on the page for target search terms isn't just important— it's vital.

Determining share of voice is the first step as brands analyze how a product ranks next to competitors in the search results. Share of voice represents the exposure a brand is getting relative to competitors. On the Amazon platform, it denotes a brand's share of products displayed in the search results for a search term. Share of voice is directly linked to brand awareness and product sales. By tracking this metric over time, an organization can understand where its strengths and weaknesses lie, as well as the steps it should take to improve.

\*Fessenden, T. (2018, April 5). Scrolling and Attention. Nielsen Norman Group.

\*\*CPC Strategy. (2018). The 2018 Amazon Shopper Behavior Study.





## **SHARE OF VOICE & RANK** on the digital shelf are determined by a variety of factors.

In the following pages, we will assess the characteristics of top-performing brands and the reasons that they stand out. To accomplish this, we will examine three unique shoppers—Wendy, Teresa, & Jared—as they search for office supplies, snack bars, and dog food on Amazon.

## WENDY is an office manager at a small but growing start-up in San Francisco, CA.

She's been tasked with finding office supplies for the company; in particular, she needs to find binders to create new employee booklets. She turns to Amazon to find high quality binders at an affordable price.

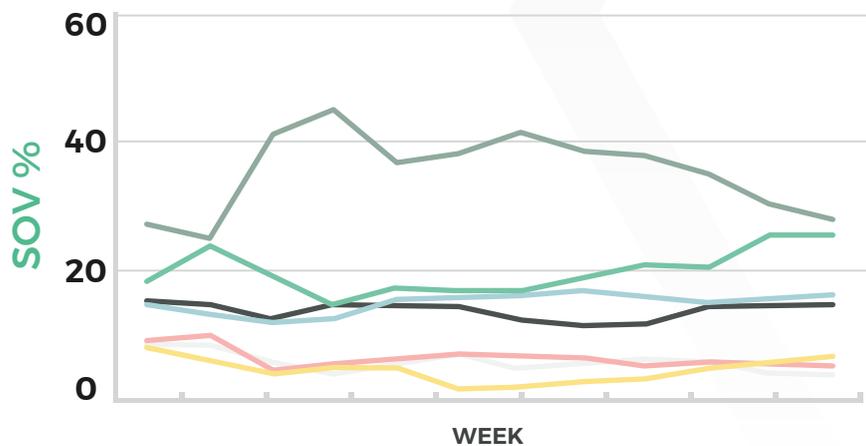
**If she's like 70% of Amazon shoppers, she won't venture past the first page.** A quick

glance through her results will reveal that a handful of brands dominate.

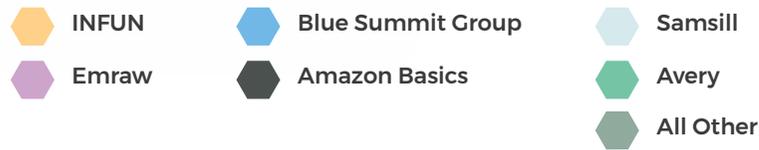
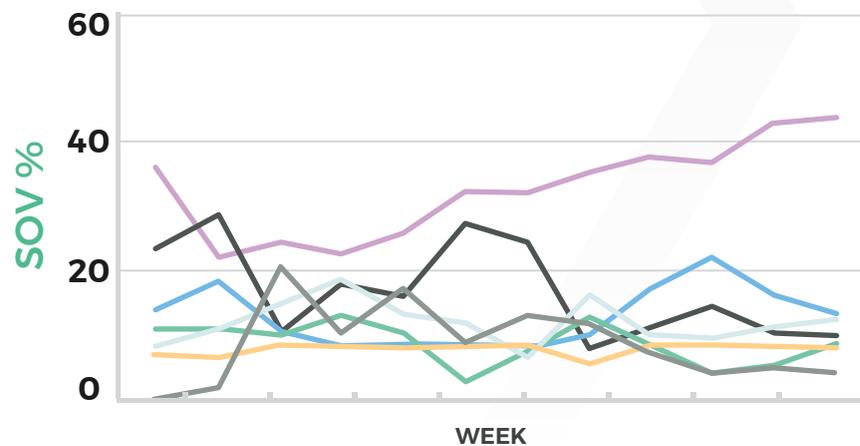
Reviewbox's **Share of Voice** report displays the top brands appearing in the Amazon first page search results for "binder" throughout a 90-day period. This report reveals that the top five binder brands together capture approximately 65% of the page's share of voice, organically. These brands are most visible to Wendy in her search for binders, and as a result, are far more likely to acquire her sale.



### ORGANIC Share of Voice Insight: Binder



### SPONSORED Share of Voice Insight: Binder



# What factors contribute to a larger share of voice?

Using Reviewbox's suite of tools, we've analyzed data on various listing elements to answer this question. Below are the average metrics for each of these top brands. Our data reveals significant differences in almost all areas between the top-performing brands and those that fall in the later pages of Amazon's results. Overall, the top five brands provide more information for their customers. They have more descriptive product detail pages and extensive customer

feedback in the form of reviews and questions. Almost all of their products are offered through Amazon Prime and at a lower price on average. While these factors might not guarantee that Wendy will purchase their binders, these brands have a leg up on their competition. Their products both rank higher in the search results and provide Wendy with the extensive information she desires as she determines the product that is best for her company.

Brand	Price	% Prime	% A+	# Features	# Images	# Description Length	# Reviews	# Questions
Amazon Basics	\$23.00	100%	100%	5	6	17	624	30
Avery	\$13.96	100%	65%	5	6	963	514	44
Cardinal	\$23.82	99%	42%	5	6	781	82	9
Case It	\$21.42	99%	50%	5	4	698	580	28
Samsill	\$22.77	97%	31%	6	6	893	116	18
Pages 2+	\$24.18	92%	31%	4	5	499	124	10

**Teresa is a working mother from Austin, Texas. She balances the demands of her career in sales with the demands of parenthood.**

Constantly on the move, Teresa struggles to find the time to prep lunches to take to the office and is looking for healthy snacks to fuel her throughout the day.

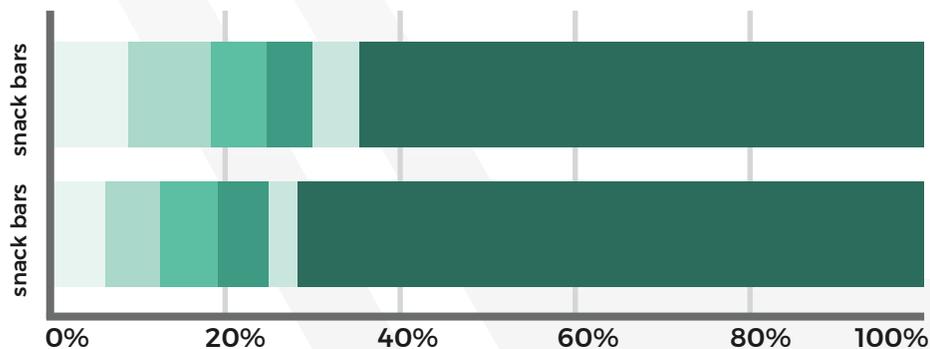
In her search for the healthiest snack options, she turns to Amazon for the best products. Teresa's journey to find the perfect snack bar will reveal several key

brands occupying most of the results page with both organic and sponsored products. Reviewbox's Share of Voice report provides category overview snapshots with top brands' share of voice averaged over a selected time period. In the case of Teresa's search for snack bars, the most prominent brands differ between organic and sponsored results. While LUNA and This Bar Saves Lives don't have the top digital shelf ranking organically, they've been able to earn a top spot through Amazon advertisements.



### ORGANIC

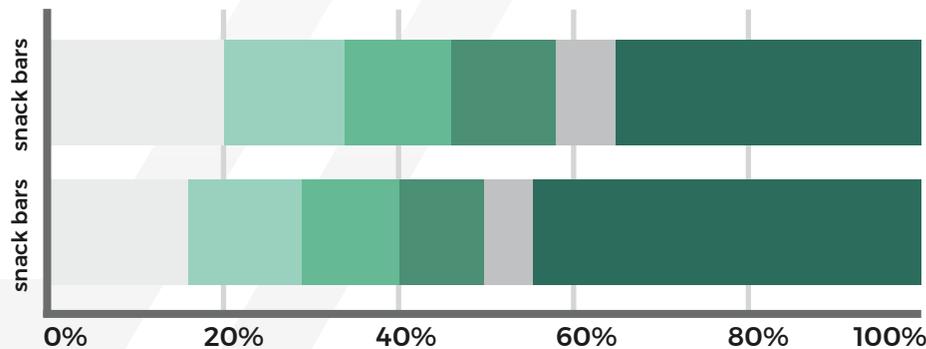
- ◆ Wickedly Prime
- ◆ Clif Bar
- ◆ Nature Valley
- ◆ KIND
- ◆ Quaker
- ◆ All Other



SHARE OF VOICE %

### SPONSORED

- ◆ LUNA
- ◆ Clif Bar
- ◆ This Bar Saves Lives
- ◆ KIND
- ◆ Quaker
- ◆ All Other



SHARE OF VOICE %

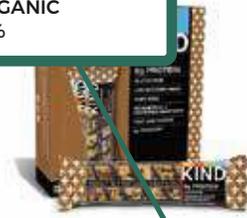
Type	Price	% A+	% Prime	% Best Seller	% Amazon's Choice	# Features	# Images	# Questions	# Variations
ORGANIC	\$38.79	49%	61%	12%	30%	4	6	30	5
SPONSORED	\$20.85	67%	95%	15%	34%	5	8	37	6

# How do **ORGANIC** and **SPONSORED** products compare?

**56% MORE PRIME FULFILLMENT**  
SPONSORED | ORGANIC  
95% | 61%

**12% MORE AMAZON'S CHOICE**  
SPONSORED | ORGANIC  
34% | 30%

**20% MORE BESTSELLERS**  
SPONSORED | ORGANIC  
15% | 12%



Sponsored (S)  
KIND Bars, Peanut Butter Dark Chocolate, Bg Protein, Gluten Free, 1.4 Ounce Bars, 12 Count  
★★★★☆ - 1,524  
\$14.22 (\$0.85/Ounce)  
Save 5% more with Subscribe & Save



Sponsored (S)  
KIND Bars, Caramel Almond and Sea Salt, Gluten Free, 1.4 Ounce Bars, 12 Count  
★★★★☆ - 1,370  
\$14.22 (\$0.85/Ounce)  
Save 5% more with Subscribe & Save  
prime FREE One-Day. Get it Tomorrow, Jun 6



Ultimate Healthy Fitness Box - Protein & Healthy Granola Bars Sampler Snack Box (56 Count) - Care Package - Gift Pack - Variety...  
★★★★☆ - 49  
\$35.99  
prime FREE Delivery Fri, Jun 7



Amazon's Choice  
CLIF BAR - Energy Bar - Variety Pack - (2.4 Ounce Protein Bar, 16 Count)  
★★★★☆ - 115  
\$18.99 (\$0.49/Ounce)  
Save 5% more with Subscribe & Save  
prime FREE Delivery Fri, Jun 7



Snack Variety Pack, Healthy Bars Sampler & Care Package in an elegant Blue Ribbon Gift Box (60 count) by Blue Ribbon  
★★★★☆ - 71  
\$24.99  
prime FREE Delivery Fri, Jun 7



Quaker Chewy Granola Bars, Variety Pack, 58 Count  
★★★★☆ - 1,043  
\$10.96 (\$0.22/Ounce)  
Save 5% more with Subscribe & Save  
prime FREE One-Day. Get it Tomorrow, Jun 6

**38% MORE A+ CONTENT**  
SPONSORED | ORGANIC  
67% | 49%



KIND Bars, Nuts and Spices Variety Pack, Gluten Free, 1.4 Ounce Bars, 12 Count  
★★★★☆ - 547  
\$16.22 (\$0.97/Ounce)  
Save 5% more with Subscribe & Save  
prime FREE One-Day. Get it Tomorrow, Jun 6



Healthy Snacks and Bars Variety Pack Gift Snack Box - Bulk Sampler (Care Package 56 Count)  
★★★★☆ - 117  
\$33.99



Best Seller  
Pure Protein Bars, High Protein, Nutritious Snacks to Support Energy, Low Sugar, Gluten Free, Variety Pack, 1.76oz, 18 Pack  
★★★★☆ - 1,755  
\$46.99



Quaker Chewy Granola Bars, 25% Less Sugar Variety Pack, 58 Bars  
★★★★☆ - 238  
\$10.99 (\$0.22/Ounce)  
Save 5% more with Subscribe & Save  
prime FREE One-Day. Get it Tomorrow, Jun 6



Nature Valley Granola Bars, Sweet and Salty Nut, Almond  
★★★★☆ - 106  
\$6.53 - \$19.98  
prime



Best Seller  
KIND Nuts & Spices, Dark Chocolate Nuts & Sea Salt, 1.4 Ounce, 12 Count  
★★★★☆ - 4,156  
\$14.22 (\$0.85/Ounce)  
Save 5% more with Subscribe & Save  
prime FREE Delivery Fri, Jun 7

**46% LOWER PRICES**  
SPONSORED | ORGANIC  
\$20.85 | \$38.79

## Jared is a recent college graduate living in Knoxville, Tennessee.

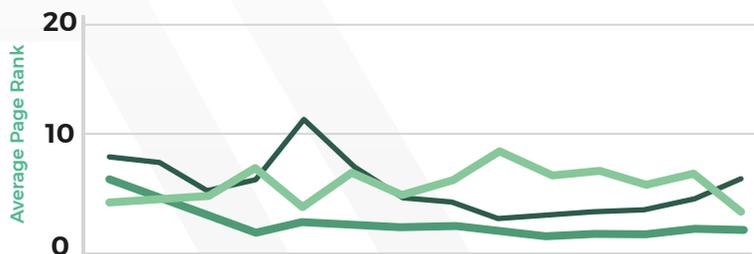
He spends his weekends hiking throughout the Smoky Mountains and at craft breweries. He just adopted his first dog to accompany him on his outdoor endeavors, but he doesn't know much about taking care of a pet. As he tries to figure out the most nutritious food to fuel his dog for their adventures, he turns to Amazon for help.

Because Jared is unsure of the best dog food for his new companion, he limits his

options to the very first products in his search results. Just like nearly two-thirds of Amazon users, Jared focuses on products that appear above the fold. Using Searchbox, we have tracked these top products' search rank over a 90-day period. As their search ranking fluctuates continuously with changes in their listing content, price, number of reviews, and more, the products most likely to be seen by Jared will change. We've examined the attributes of top products in the dog food category to assess the factors that keep them at the top of the page and top of mind for Jared.

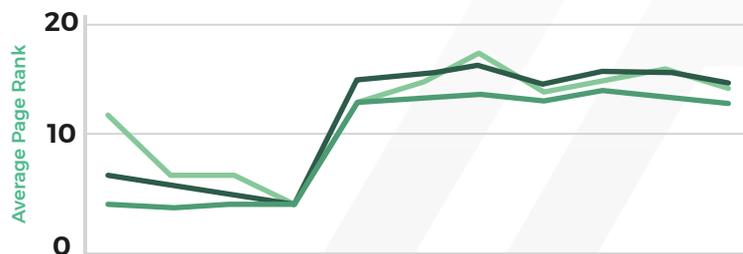


### ORGANIC Dog Food



- ◆ Blue Buffalo Life Protection Formula Natural Adult Dry Dog Food
- ◆ Pedigree Adult Dry, Roasted Chicken, Rice & Vegetable Flavor
- ◆ Rachael Ray Nutrish Natural Dry, Real Chicken & Veggies, 28LB

### SPONSORED Dog Food

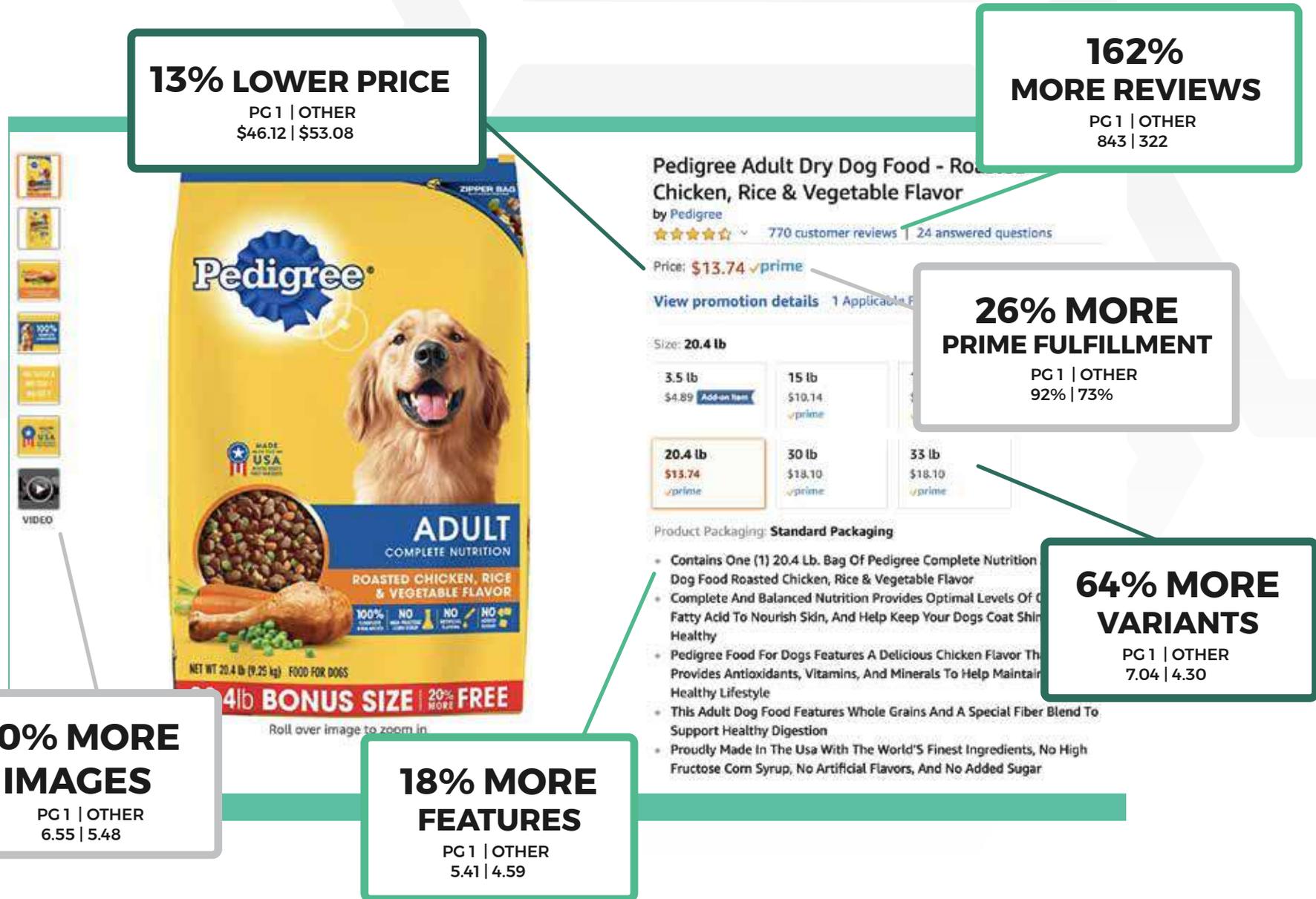


- ◆ Hill's Science Diet Dry, Puppy, Large Breeds, Chicken Meal & Oats
- ◆ Natural Balance Original Ultra Whole Body Health Dry, Chicken & Duck Meal, 5 LB
- ◆ Rachael Ray Nutrish Dish Natural Dry, Chicken & Brown Rice, Veggies & Fruit, 23 LB

ORGANIC

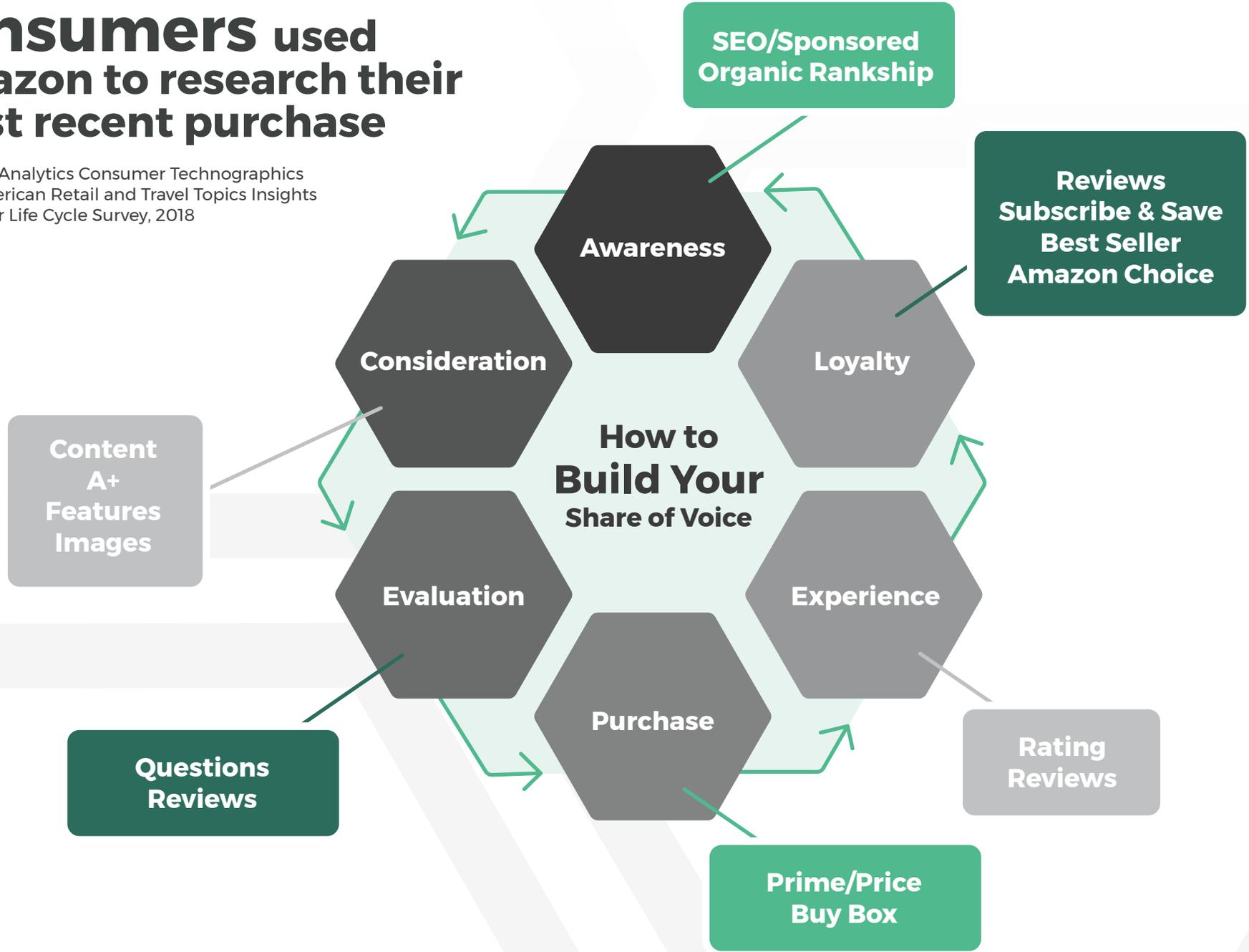
Type	% A+	# Features	# Images	# Questions	% Prime	Price	% Best Seller	# Variations
PAGE 1	86%	5	7	75	92%	\$46.12	9%	7
PAGE 2+	63%	5	5	27	73%	\$53.08	4%	4

# What makes top products **STAND OUT?**



# 28% of consumers used Amazon to research their most recent purchase

Forrester's Analytics Consumer Technographics  
North American Retail and Travel Topics Insights  
1 Customer Life Cycle Survey, 2018



## CONCLUSION

As e-commerce advances, consumers' shopping habits change, and brand loyalty decreases, brands need to maximize their share of voice on the digital shelf. This will require brands to reconsider their strategy to capture the attention of shoppers during the consideration phase of their journey.

**SHARE OF VOICE** is critical in capturing sales. In their online searches, almost all consumers will limit their product search to the most visible products on the page. Without being in customers' line of sight when they commence an online search, brands can be easily lost in a sea of competitive products. We saw that almost two-thirds of Wendy's first-page search results were comprised of five different binder brands. Brands that lack a large share of voice are almost certain to lose sales to their more visible counterparts.

### ABOVE THE FOLD IS THE "END CAP" OF THE DIGITAL SHELF.

In the past, a product's success was directly related to its visibility in physical storefronts. Ad dollars went to purchase space on end caps to ensure that their products were seen in-store. In the age of the endless aisle, the best real estate on the digital shelf is above the fold.

While a large organic share of voice might land a brand in one of these top spots, sponsored brands have a leg up. For almost every Amazon search, results will yield sponsored products at the very top of the page. In our analysis of snack bars, brands LUNA and This Bar Saves Lives ranked behind other top brands organically. They were able to surpass competitors by investing in advertising for these products.





## INFORMATION IS KEY.

Today's consumers have access to an endless supply of information to influence their purchase decisions. When they are in the consideration phase of their shopping journey, they require the right insights to help move them to the point of purchase. Top brands stand out from their competition with more descriptive product detail pages, from features to images; they are far more likely to use A+ content in doing so.

In Jared's search for dog food, top brands provided 20% more images, 18% more features, and were 37% more likely to have A+ content. These brands also have extensive customer feedback in the form of reviews and questions. In Jared's results, top brands had 162% more reviews on average.

## CUSTOMERS SEEK SAVINGS & CONVENIENCE.

The two primary reasons that millions of people have flocked to the Amazon platform are its convenient shipping and unrivaled prices. We saw that the top five brands in Wendy's results had nearly 100% Amazon fulfillment and provided lower prices on average than competitors. When a brand fails to deliver savings and convenience to consumers on their shopping journey, they can simply seek out another brand that's willing to do so.

# Reviewbox



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