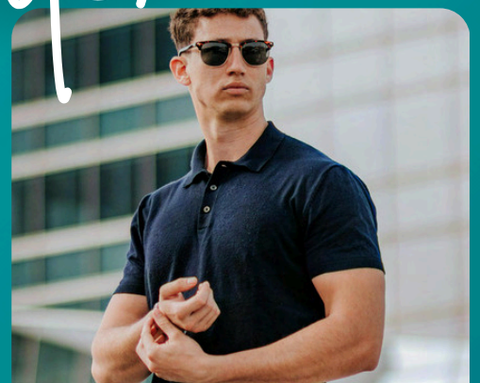












Shopper Experience Index 20

bazaarvoice®

Shopper Experience Index VOL. 20

What new research reveals about modern buyer habits



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Here we are.

In an era of decentralized brand trust.

Shoppers are shifting their attention away from traditional and broadcast marketing tactics, including traditional search, commercials, and advertisements.

Instead, they're moving it to communities of everyday shoppers and trusted creators on social media and other digital third spaces*—and increasingly, to the AI search and shopping tools that depend on what those communities say.

What happens when digital communities become a key facilitator of communication and abritator of brand trust?

These communities are dynamic and fluid, and shoppers have begun to mirror them—becoming highly adaptive, in part by choice, and in part because of the economic uncertainty they're navigating. They pivot their shopping behaviors and decisions, based on the product, the price, the stakes—and importantly—the sentiment of the community.

In order to protect brand equity, and keep it working on your behalf, your brand needs to become just as adaptive. That starts with understanding the shopper experiences shaping purchase decisions and leveraging the communities influencing them.

Brand equity
The value your brand carries in the minds of shoppers—the accumulated familiarity, preference, and trust—that makes them choose you over a cheaper or less familiar alternative, even when they're under pressure to spend carefully.

**Digital third spaces are online environments where people gather, socialize, and build relationships outside the realms of home (the "first place") and work or school (the "second place")—adapted from sociologist Ray Oldenburg's classic "third place" theory.*

The architecture of a purchase decision

We surveyed more than 1,500 shoppers across North America, EMEA, and APAC, and asked them to identify their own behavior at four distinct moments: when they discover a product, when they're researching it, when they're deciding to buy it, and after they buy it.

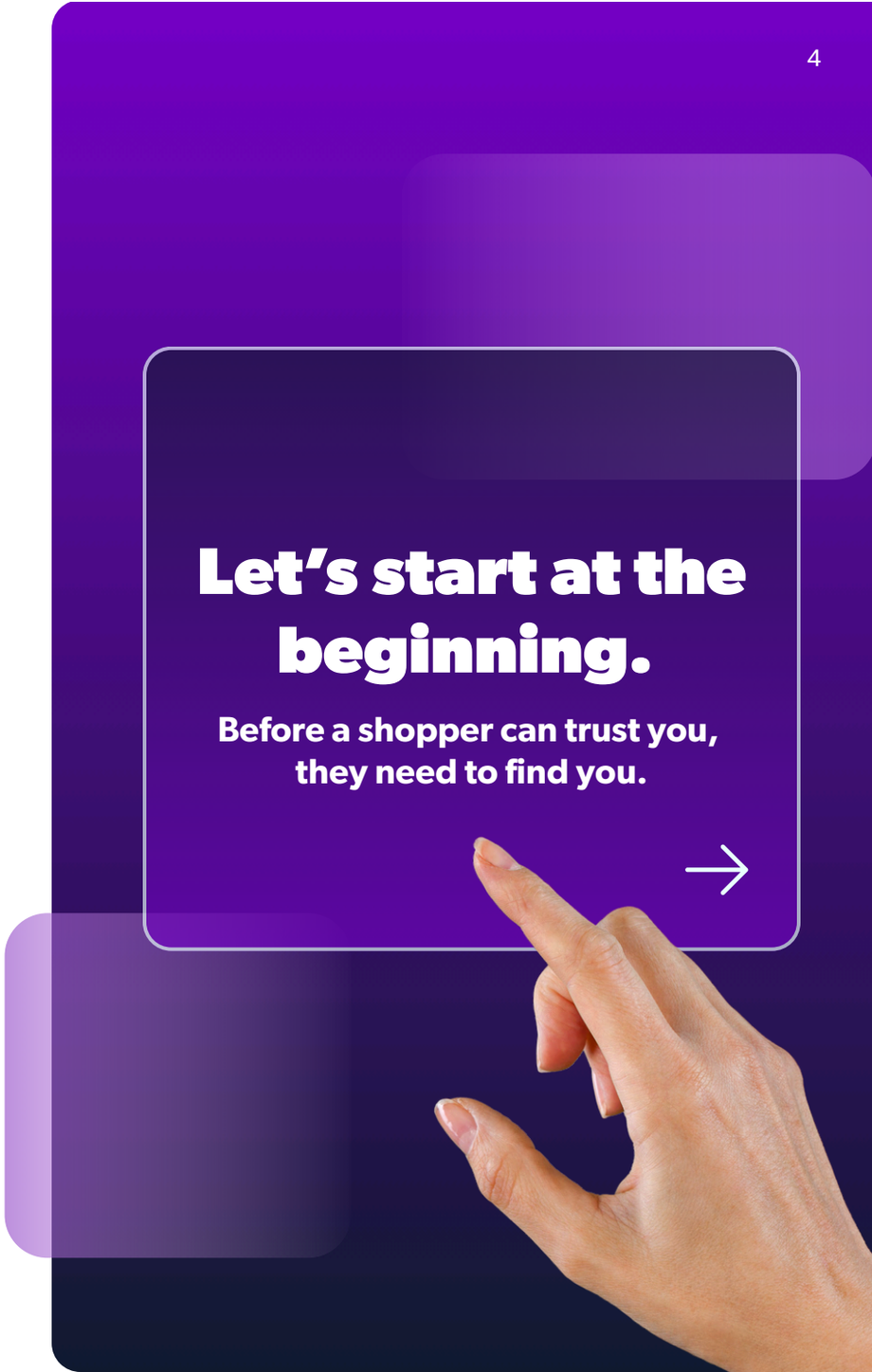
These four moments aren't really up for debate. Discovery happens before research. Research happens before purchase. Purchase happens before whatever comes next. That sequence is what makes up a purchase decision, for every shopper, every time.

What happens inside each moment is a different story. At every one of these moments, shoppers didn't converge on a single behavior. They split into different behaviors—or mindsets. We found sixteen mindsets in total, each reflective of a way shoppers identify themselves as they move through a purchase.

You won't need to memorize all sixteen—the chapters ahead will show you the eleven that matter for your brand, and what to do about each one.

That's the structure of this playbook.
Four moments.
Eleven mindsets.
One toolkit per moment.

So what does that mean for you, the brand marketer deciding where to put your next dollar? It means we're giving you a new playbook—one built for the era of decentralized trust and reflective of how shoppers actually behave now.



CHEAT SHEET

Shopper moments and mindsets

MOMENT 1: Open to influence



The Media Muse
Traditional ads still work on them.



The Creator Devotee
Wasn't looking, but a creator convinced them.



The AI Adopter
Knows what they want, but not which brand.



The Ambient Absorber
Doesn't shop, just…absorbs IRL.

MOMENT 2: Searching for proof



The Archivist
Researches products like it's their day job.



The Vibes Auditor
Only trusts the three-star reviews.



The Ghost Shopper
Has 11 items in their cart… for the past 4 months.

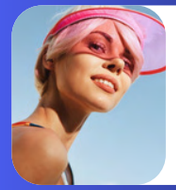


The Delegator
Asks their group chat for recommendations.

MOMENT 3: Weighing value



The Thrifty Shopper
Would rather spend two hours finding a deal than two minutes paying full price.



The Believe-It-When-They-See-It Buyer
Won't commit without seeing the product in person first.



The Commitment Sprinter
Has the tab open for three weeks and then checks out in 45 seconds.



The Returner
Buys three and then keeps one. That's their process.

MOMENT 4: Ready to influence others



The Everyday Influencer
Naturally posts and tags products they love online.



The Unsolicited Evangelist
Tells everyone about products they love, unprompted.



The Lukewarm Endorser
Quietly content. Will leave an honest review if asked.



The Negative Nancy
Only reviews bad experiences.

MOMENT 1: OPEN TO INFLUENCE

Winning shopper attention in the era of passive discovery

Remember those digital third spaces we mentioned? Most shoppers aren't there to shop. They're there to gather, socialize, and build relationships—whether that's browsing Reddit, scrolling TikTok, or watching YouTube. But that's exactly where the modern shopping journey often begins, long before a shopper forms any intention to buy.

For a lot of brands, the instinct is still to buy attention. Here's the data that should put that instinct to rest: **Only 16% of shoppers describe themselves as The Media Muse—the person whose shopping habits are driven by traditional commercials and advertising.** Among Millennials, that drops to 14%. Among Gen Z, 13%.

Shoppers that identify as The Media Muse

by generation





So if ad spend isn't winning shoppers' attention, what is?

Nearly half of shoppers (48%) describe themselves as The Creator Devotee: They don't go to these digital third spaces looking for products, but are convinced anyway by people they already trust—other everyday shoppers and creators. Among Millennials and Gen Z, that climbs past half (51% and 52%).

Shoppers that identify as The Creator Devotee

by generation





Sitting right behind The Creator Devotee is a second, almost-as-large group that didn't exist a couple of years ago. **26% of shoppers, remarkably stable across every generation we surveyed, describe themselves as The AI Adopter.** They have a vague idea of the product they want, but they have no idea which brand to choose yet.

Here's where it gets interesting: While these two groups primarily discover products in two different environments, they're both, ultimately, reached by the same type of content.

The Creator Devotee finds you because an everyday shopper or creator puts your product on their social feed. The AI Adopter finds you because an AI tool surfaces your product in a search or shopping experience. And when a shopper asks an AI assistant for "the best running shoes under $150," that AI is using the same pool of content that also earns the trust of The Creator Devotee: User-generated content (UGC).

So, one content investment ends up doing double duty. The authentic content that earns attention on a social feed is part of the same pool of content that AI tools use to decide you're worth recommending. Different shopper, different mindset. Same moment, same underlying asset.

Shoppers that identify as The AI Adopter

by generation





TOOLKIT 1

Capturing shoppers open to influence

Mindsets affected: The Creator Devotee, The AI Adopter

The problem:

Shoppers are actively filtering traditional, broadcast marketing tactics out of their attention. Instead, a meaningful share of them are spending their time in digital third spaces and on AI tools you don't directly control.





Solution 1:

Invest in creator campaigns (we offer this through Bazaarvoice Creator Marketing) to scale social-first content that stops the scroll. This is how you reach The Creator Devotee. The best tactic for this mindset isn't to use one mega-influencer either; it's to use the many high-fit nano, micro and macro creators who are actually building their own audience, connections and community.

Solution 2:

Invest in reviews and other user-generated content to reach The AI Adopter. AI shopping agents rely heavily on UGC to understand and recommend a product—but that content needs to be structured for AI visibility. The Bazaarvoice Authentic Discovery API™ is built to do exactly that.

MOMENT 2: SEARCHING FOR PROOF

Calibrating content for skeptical human shoppers and AI shopping agents

A shopper has noticed you. Now, their mindset shifts—and they start hunting for proof they can trust you.

38% of shoppers, the majority in three of four generations we surveyed, identify as The Archivist when researching products. They have multiple tabs open. They genuinely might even have a spreadsheet. They check the one-star reviews before they'll trust the five-star ones.

Right behind them: **23% of shoppers (30% of Boomers) are The Vibes Auditor.** They don't blindly trust five-star reviews either, or one-star rants. They go straight for the three-star reviews, because that's where they believe the honest, hedged opinions live.

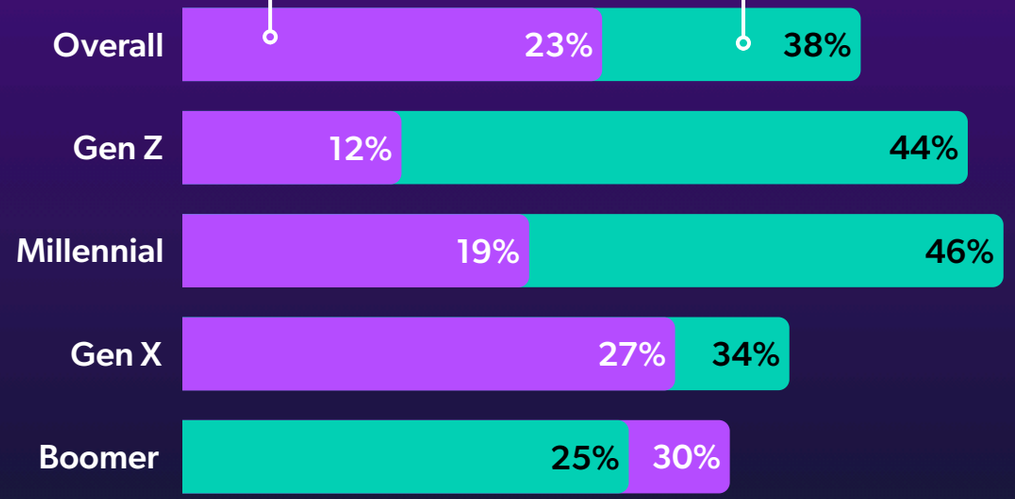
Different mindset, same demand: Both groups are looking past what your brand says about your product, straight to what your community says about it.

Shoppers that identify as The Archivist vs. The Vibes Auditor when researching

by generation







Where AI fits into the hunt for proof

You already know user-generated content has a large influence in what gets you surfaced to The AI Adopter in the first place, but there's another consideration here: Getting surfaced isn't the same as getting trusted.

Two-thirds of shoppers (67%) say they're comfortable with some form of AI involvement in their research. But even when shoppers feel comfortable delegating to AI, they still want to see the receipts: 22% of Gen Z say they need to see five or more sources before they feel safe buying something AI recommended, more than double the share of Boomers (8%) who say the same. The generation everyone assumes is the most impulsive is, based on this data, the most thorough.

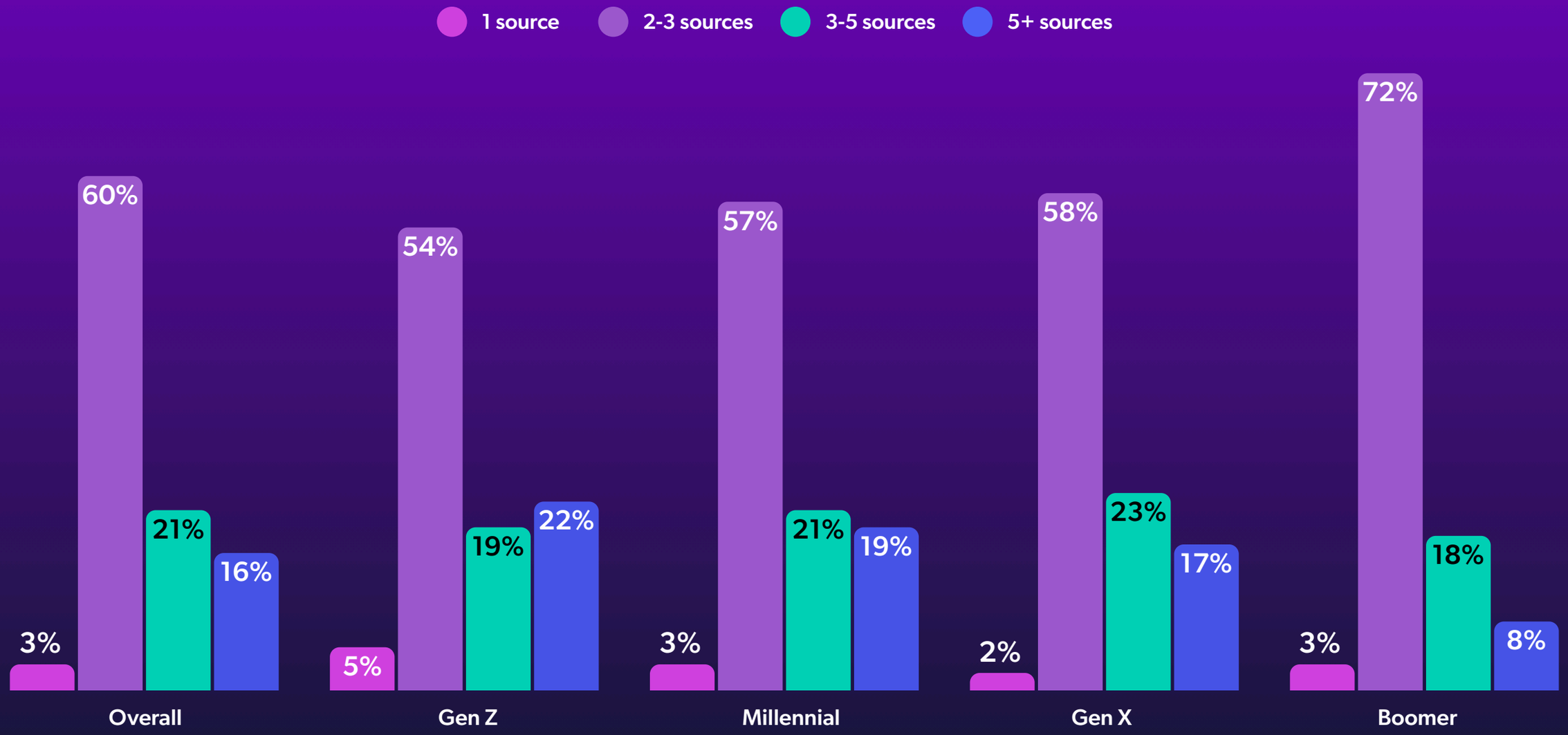
We go deeper on exactly how AI shopping tools use UGC to surface product recommendations in our product discoverability playbook for brand leaders here →

Additionally, separate research we've conducted with EMARKETER found that the single biggest driver of skepticism toward an AI recommendation—bigger than bias, outdated information, or privacy concerns—was the absence of customer reviews. Shoppers want to verify AI recommendations with real, human, community sentiment before they act on it.

> **Shoppers don't trust perfect five-star reviews.**
>
> The brands that win over these shoppers AND AI shopping agents are the ones most willing to show balanced, honest feedback instead of hiding from it.
>
> **—Dave Neway, Vice President, Product Marketing at Bazaarvoice**

Number of sources shoppers say they need before feeling safe buying something AI recommended

by generation



TOOLKIT 2

Capturing shoppers searching for proof

Mindsets affected: The Archivist, The Vibes Auditor

The problem:

Shoppers are skeptical. The biggest hurdle after discovery is getting The Archivist and The Vibes Auditor to trust you—often in digital third spaces or other environments you don't control.





Solution 1:

Move budget toward ratings and reviews collection—not for volume alone, but for depth. Design collection prompts that push for specificity and detail, including pros and cons, balance, and nuance (we can help you here!). That's the same content that satisfies your most demanding researchers and gives AI tools the granular signals they need to recommend you confidently.

Solution 2:

Syndication. Don't let your reviews sit in one place. Push them across digital environments as widely as possible, so The Archivist and The Vibes Auditor have the best chance of finding them wherever they're looking. (Bazaarvoice's network of brands, retailers, and media partners is visited by 2.3B shoppers monthly—you can learn more about it here.)

MOMENT 3: WEIGHING VALUE

Building brand equity to sway shopper selection

At the start of this playbook, we said shoppers have become highly adaptive—partly because they mirror the communities they're a part of, partly because of the economic uncertainty they're navigating. Nowhere is that more visible than in how they weigh value.

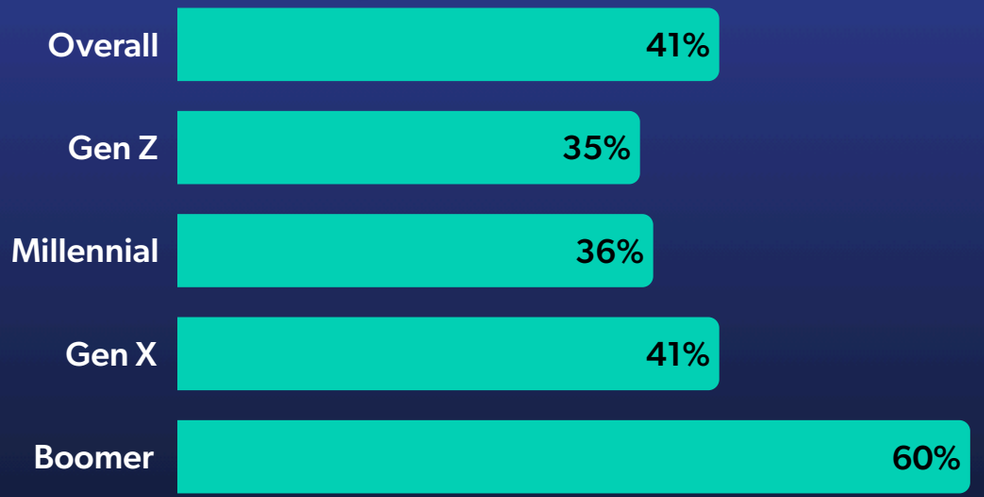
Economic uncertainty hasn't made shoppers stop spending, but it has made them recalibrate what's worth their money. **43% of Gen X and Millennial shoppers, and 52% of Gen Z, say they've canceled or paused a recurring subscription in the last three months**—specifically to free up cash for a one-off purchase. This indicates shoppers aren't retreating from spending, but they are being more intentional about it. And maybe counterintuitively, they're concentrating it—making every purchase more high-stakes than it used to be.

This is also where we meet the largest archetype in the entire study: **The Thrifty Shopper, 41% of all shoppers (60% of Boomers)**, who'd genuinely rather spend two hours finding a deal than two minutes paying full price.

Shoppers that identify as The Thrifty Shopper

by generation

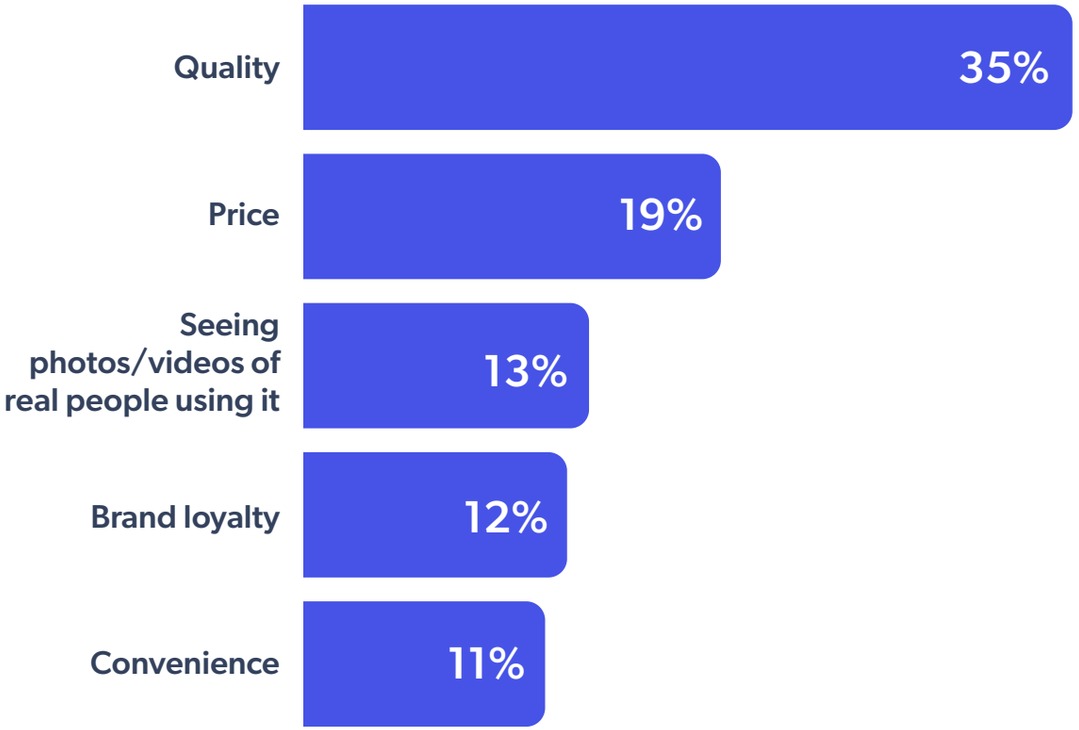




So what makes a price-sensitive shopper feel confident enough buy? **Your brand equity becomes their insurance policy.** For a $15 everyday item (e.g., snacks, soap), quality (35%) completely doubles price (19%) as the top priority. Once the stakes rise to a $1,000 item, quality still leads (30%), but now runs nearly even with "extensive research and data comparisons" (28%)—this is The Archivist mindset coming through again, just at a higher price point.

Top purchase priority, by price point

$15 everyday item



Top purchase priority, by price point

$1,000 investment item



There's a second, related way shoppers protect themselves from a bad purchase: By refusing to commit sight-unseen. **37% of Gen X and Millennial shoppers say they have to see a product in person before they'll buy it, even after hours of research online. This is The Believe-It-When-They-See-It Buyer.** Boomers are the least likely to need that (23%); Gen Z sits in between (35%). It's tempting to assume needing to see it IRL is an older-generation habit, but this data says otherwise (look at Gen Z surprising us again).

Brand equity is the insurance policy

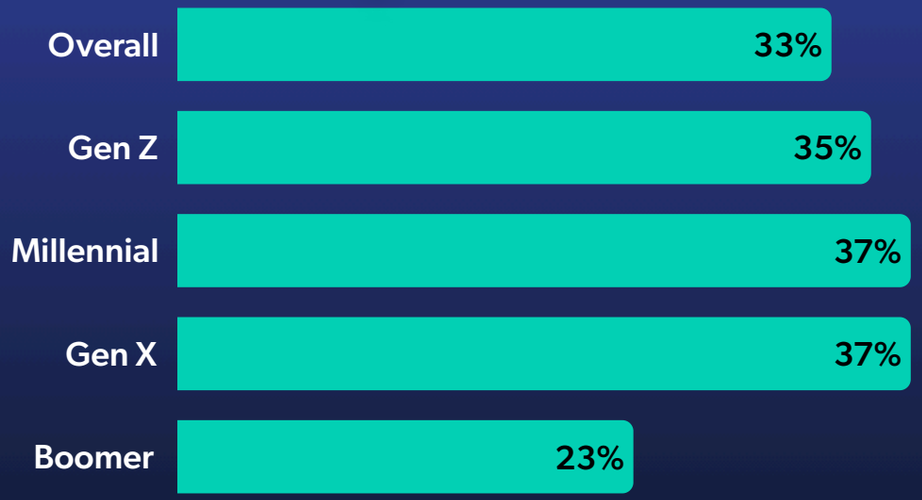
that stands between a shopper and a purchase they're afraid to regret. How this plays out? In times of economic uncertainty, brands that shoppers truly trust are actually the last to get cut from the budget.

—Jo Callahan, Vice President of Brand Strategy & Experience at Bazaarvoice

Shoppers that identify as The Believe-It-When-They-See-It Buyer

by generation





TOOLKIT 3

Capturing shoppers weighing value

Mindsets affected: The Thrifty Shopper, The Believe-It-When-They-See-It Buyer

The problem:

This mindset doesn't trust easily. The Believe-It-When-They-See-It Buyer won't commit without visual proof, no matter how much research they've already done. The Thrifty Shopper is weighing your brand against a lower-priced generic or private-label option, and needs proof that the extra cost of choosing you is worth it.





Solution

Bring real customer photos and videos directly onto your site (Bazaarvoice Galleries is a great option here). For The Believe-It-When-They-See-It Buyer, this provides the visual proof they need without leaving their home. For The Thrifty Shopper, it does something slightly different: It's evidence that other value-conscious shoppers chose your brand over other options. Their satisfaction proves that the premium was worth paying.

MOMENT 4: READY TO INFLUENCE OTHERS

Mobilizing a self-sustaining community of brand advocates

This is the moment that closes the loop—community members doing for you what traditional marketing used to do.

The two largest advocacy mindsets are almost evenly split: **43% of shoppers are The Unsolicited Evangelist**—nobody asked, but they're telling you anyway. Another **42% are The Everyday Influencer**—who posts and tags brands more than any other content type. Split by generation, a pattern emerges: Millennials (48%) and Gen X (49%) lean toward active posting. Boomers (29%) and, more surprisingly, Gen Z (42% vs. 47% Evangelist) lean toward telling people directly instead.

A third group is worth naming, because brands consistently overlook it: **14% of shoppers overall identify as The Lukewarm Endorser.** They're not a detractor, nor an enthusiastic promoter. They're just…quietly satisfied. Brands tend to forget about The Lukewarm Endorser, but in many ways this mindset reflects the actual average customer—and the one most likely to leave those measured three-star reviews The Vibes Auditor is hunting for.

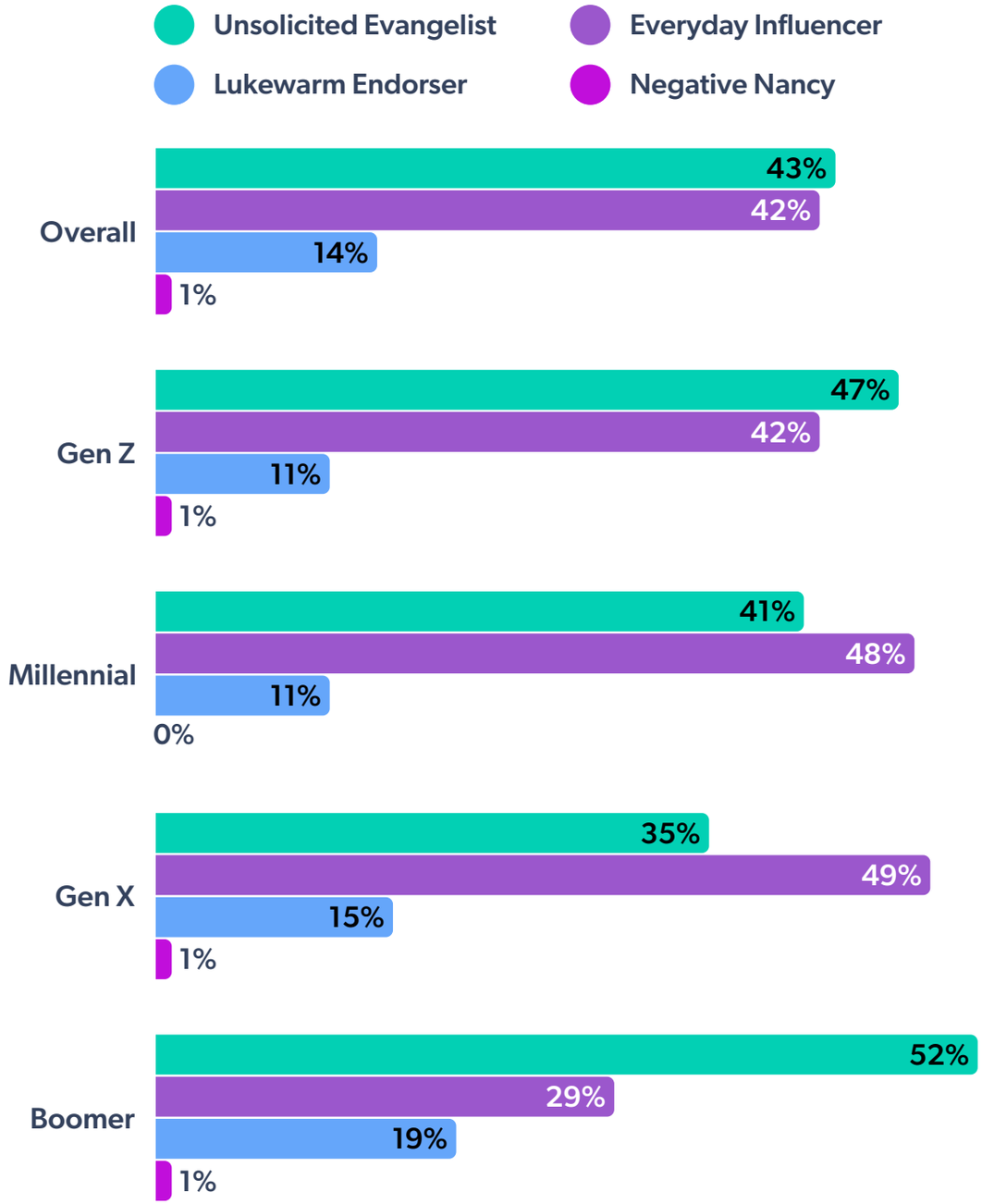


Shoppers that identify as The Unsolicited Evangelist, The Everyday Influencer, The Lukewarm Endorser, and The Negative Nancy*

by generation



A reassuring note:
The Negative Nancy, who only reviews bad experiences, makes up roughly 1% of shoppers. So breathe a sigh of relief—the fear that your review section might fill up with nothing but complaints is, statistically, unfounded.



TOOLKIT 4

Capturing shoppers ready to influence others

The Everyday Influencer, The Unsolicited Evangelist, The Lukewarm Endorser

The problem:

Roughly four in ten shoppers already want to talk about you, but most brands haven't built a robust infrastructure to capture their endorsement—and the same post-purchase moment that could activate three different mindsets usually gets treated as one generic "leave us a review" email.







Solution 1:

Targeted sampling (such as using Influenster's community of 7.5M+ members) puts your product directly in the hands of your exact target demographic, generating reviews and visual content that actually match your buyer—priming The Everyday Influencer before they've even discovered you.

Solution 2:

Once they have, give The Everyday Influencer somewhere for their opinion to go. Owned sampling communities (like those built through Bazaarvoice Ambassadors) turn your most engaged customers from a string of sporadic posts into an always-on content source.

Solution 3:

Your post-purchase flow shouldn't ask every customer the same thing. For The Unsolicited Evangelist, who's already talking about you unprompted, a simple, well-placed call-to-action to share on social can turn a dinner-table chat into shareable content. For The Lukewarm Endorser, who won't volunteer an opinion unless asked, a brief, low-effort review request is usually enough to turn silence into a measured review.

Putting it all together

You've seen the four mindsets, and the toolkit for each. Here's the full picture in one place, to share easily with your team or for whenever you need a quick refresh.



	Brand Marketer Strategy	The Bazaarvoice Solution
MOMENT 1: **Open to influence**	Scale authentic, social-first content through partnerships with creators and everyday shoppers; build an always-on UGC sourcing engine; ensure content is structured for AI visibility	We connect you with high-fit creators and everyday shoppers to generate the content that reaches shoppers before they're actively looking. And through the Bazaarvoice Authentic Discovery API™, we make sure that content is structured so AI shopping tools can surface your products to shoppers like The AI Adopter.
MOMENT 2: **Searching for proof**	Collect UGC that goes beyond star ratings; syndicate reviews as widely as possible	We help you collect the specific, balanced reviews The Archivist and The Vibes Auditor are hunting for—and that AI tools need to recommend you confidently. Then we push that content across our network of 2.3B monthly shoppers so it's wherever they're looking.
MOMENT 3: **Weighing value**	Bring real customer proof onto your own site	Through Bazaarvoice Galleries, we bring real customer photos and videos onto your product pages—giving The Believe-It-When-They-See-It Buyer the visual proof they need, and showing The Thrifty Shopper that other value-conscious shoppers chose you and were glad they did.
MOMENT 4: **Ready to influence others**	Run targeted sampling programs; build owned advocacy communities; optimize post-purchase flows for different shopper types	Through Influenster's community of 11 million members, we put your product in the hands of the right people. Through Bazaarvoice Ambassadors, we give your most engaged customers a home. And we help you design post-purchase flows that turn silence into reviews and dinner-table chatter into shareable content.

A quick scorecard

How adaptive is your brand today?

Score 2 for yes, 1 for partially or unsure, and 0 for no

- ☐ Do you have an always-on structured creator program reaching micro and macro creators in your category?
- ☐ Is your UGC structured so AI shopping tools can read and surface it (not buried behind JavaScript-only rendering)?
- ☐ Do your review collection prompts actively push for specific, balanced detailed reviews (not just star-ratings)?
- ☐ Are your reviews syndicated across different digital environments, including retailers, and AI and social shopping experiences?
- ☐ Do you have real customer photos and videos live on your own product pages, not just on social?
- ☐ Do you have a sampling or seeding program for new or hero products?
- ☐ Do you have a dedicated customer advocacy space or program for your most engaged repeat customers?
- ☐ Do your post-purchase emails or flows include any prompt to post or share on social, beyond a generic review request?

Scoring: *If you scored…*

12-16 You have a strong, adaptive foundation.

6-11 You're halfway there. Pick the weakest area from the chart and start with that toolkit.

0–5 You're still running the old playbook; Toolkit 1 or 2 is your starting point.

The ecosystem loop

One clarification before we start: This isn't a single shopper's personal journey from discovery to advocacy. This is a loop at the level of your entire customer base. One shopper's actions in their Ready to Influence Others moment, months later, becomes the evidence for a shoppers in their Searching for Proof moment.



Conclusion

The brands that will thrive in an era of decentralized trust are the ones that realize trust no longer flows from their brand—it flows to it. And it accumulates, unevenly, across every digital third space your shoppers spend time in.

Every chapter in this playbook describes a different shopper with a different mindset in a different moment. But underneath everything is the same shift in how trust flows.

This is not a loss of control so much as a redirection of it. You can't buy attention or trust anymore, but you can earn it with the content your customers are building. Ultimately, the authentic voice of your customer is the only durable way to build brand trust. And it's never yours to manufacture, only yours to amplify.

Learn more about how to optimize your content for your priority shopper mindsets and moments **here.**

