



# SIGNALS OF INTENT

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Retail



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# Signals of Intent

Signals of Intent is a series of data-led investigations decoding the unique behaviours marketers can use to identify and target high-intent consumers.

Following our deep dives into Travel and Health, this third installment applies our proven framework to the Retail sector. By combining primary research from 3,000 Australians with verified transactional data, we have connected consumer motivation to real-world action to reveal the true signals of retail intent.

# Finding retail growth is getting harder in a *tightening economy*

For the past 3 years, the Australian retail narrative has been dominated by the cost of living. We stood by waiting for things to ease, for the RBA to pivot, and for consumer confidence to return. Instead, we've entered a cycle where the belt is simply tightening further.

## **But here is the paradox.**

While the headlines say everyone is cutting back, the data shows that there are consumers still shopping. They haven't stopped spending; they have simply stopped spending carelessly.



# There are two critical hurdles to *retail growth*

Standing out in  
an *overcrowded  
market*.

In a landscape where  
products and ranges  
often feel  
interchangeable, standing  
out depends on  
recognising shopper  
intent before they even  
visit your store or  
website.

Breaking the  
*single-Item  
barrier*.

Retailers are plagued by  
the one and done habit,  
where shoppers  
purchase a single  
planned item and fail to  
expand their basket,  
limiting transaction value  
and growth.

In this context, *value* matters more than *volume*.



### *Growth Strategy*

In a tightening market, **growth** depends on identifying high-value shoppers before they even visit your store or website.

### *Maximising ROI*

Retailers who recognise and target **high-value intent** early will maximise their return on investment.

# Defining the *High-Value Australian* shopper

This research identifies the High-Value Shopper. These are the **top 25%** of spenders from three distinct retail sectors:

- Premium Department Stores
- Discount Department Stores
- Home Retailers.



Across these sectors, we found a **consistent set of behavioural signals** that define high-value intent. While there is natural nuance between categories, the core Signals of Intent remain remarkably stable.

By isolating this high-value cohort, we can identify the specific behavioural signals that precede a high-value transaction.

The Hidden Challenge:

On the surface, high  
and low spenders  
look *exactly the same*

Most shopping journeys start and end in a similar way, regardless of the final spend. Targeting why a person shops often fails to distinguish value.





## Purchase triggers are the same for high or low value shoppers

- **Replacement:** 21% of all shoppers are replacing something broken or worn out (20% for High-Value vs. 21% for General Market).
- **Necessity:** 20% of shoppers are making planned, essential purchases (flat for both high and low spenders).
- **Occasion:** 10% of shoppers are gift-shopping again, flat across both groups.

## And so is their level of satisfaction

Bottom-of-funnel outcomes show no variance between high and low value shoppers.

- **Satisfaction:** Both High-Value Shoppers and the General Market report a 93% NET satisfaction rate.
- **Repurchase Intent:** The likelihood to return to a store is nearly identical (88% for High-value shoppers vs. 89% for the General Market).



# To find the High-value Shopper, retailers must look past the "why" and focus on the "how".

If you only target top-of-funnel triggers (like search terms for a "broken fridge") or bottom-of-funnel metrics (like CSAT), you are treating your most valuable customers exactly like your least valuable ones.

To find the High-value Shopper, we must **focus on the behavioural signals that occur during the journey.**

# Decoding the signals of *high-value intent*.

There are four distinct behavioural markers that distinguish the High-Value Shopper from the General Market.

These signals allow marketers to move from broad demographic targeting to precision behavioural targeting.

01. The luxury of deliberation

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02. Building confidence  
through action

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03. The pause before the  
purchase

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04. Opening the budget halo



## Signal 01

# The Luxury of Deliberation

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A longer journey is a sign of a higher value shopper.

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For the General Market, shopping is often a functional race to the finish line. For High-Value Shoppers, time is a strategic tool used to ensure a smart choice. They don't just shop longer; they dwell deeper in the phases where brand influence is most potent.

## Signal 01

# High-Value Shoppers don't just spend more; they dwell longer.

Critically, this deliberation is a behavioural trait, not just a category byproduct; even when shopping for the exact same item as the General Market, the High-Value Shopper will engage in a more exhaustive journey to ensure a smart purchase.

Journey Intensity by category (vs. General Market):

- Discount department stores: **5.7 days** (+33% longer)
- Premium department stores: **11.3 days** (+77% longer)
- Home retailers: **23.5 days** (+124% longer)



## Detailed journey comparison **High-Value Shoppers vs. General Market**

Journey Phase	High-value shoppers	The General Market	% Difference
Inspiration	6.7 days	3.2 days	+111% longer
Research	3.9 days	2.3 days	+68% longer
Purchase	1.9 days	1.2 days	+55% longer
<b>Total Journey</b>	<b>12.5 days</b>	<b>6.7 days</b>	<b>+86% longer</b>

## Signal 01

### The opportunity:

# Prioritise *research intensity*

Shift focus from the initial trigger to the active research window. Use journey length as a proxy for value by attributing success to the moments of external validation that occur outside of your brand's own ecosystem, such as engagement with trusted editorial and expert reviews.

## Case Study:



## THE ICONIC.

The Iconic identifies High-Value Shoppers by tracking intensity signals like high Wishlist usage and visual search. Instead of simply retargeting a single item, they use these intensity markers to serve personalised "Complete the Look" content while the shopper is still in their high-action research window.



## Signal 02

# Building Confidence Through Action

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High-Value shoppers use  
tech to de-risk decisions

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High-Value Shoppers are avid planners who engage in **64% more online actions** throughout their journey than the General Market. They don't just search; they utilise a sophisticated toolkit of content and technology to ensure their mission is a success.

## Signal 02

# High-Value Shoppers building confidence through more actions.

High-Value Shoppers perform more online actions than the General Market (**84 vs. 51** actions per journey).

This intensity is driven by a need to "stress-test" their choices using high-influence content and emerging technology.



De-risking behaviours (Index vs. General Market):

- **The Validation Layer:** 1.6x more likely to use News Editorial and Expert Reviews.
- **The Tech Layer:** 1.6x more likely to use Augmented Reality (AR) and 1.5x more likely to use Generative AI.
- **The Social Layer:** 1.4x more likely to use Word of Mouth and Social Media.
- **The Comparison Layer:** 1.4x more likely to use dedicated Review and Comparison platforms.

## Signal 02

### The opportunity:

Win the smart choice  
with *visible expertise*.

High-value shoppers prioritise credible guidance over price. Showcase expertise via authoritative editorial, AI tools, and expert content to drive confident decisions. Ensure brand visibility in AI search/ recommendations and trusted editorial contexts where purchase decisions are validated.

## Case Study:



## APPLE.

Apple's Genius Bar, is a leader in makes expertise tvisible. Offering shoppers credible guidance, Immediate access to expert advice, setup support, and problem resolution, assuring buyers of making the smartest decision. The premium is justified ensure the shopper feels the Smart Choice is the one that offers the most support, not the lowest cost.



## Signal 03

# The *Pause* Before the Purchase

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A final search for permission,  
not a loss of interest

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High-Value Shoppers experience a pre-purchase pause, a final moment of hesitation where they seek social proof or expert permission before committing to a large spend. This is not a signal of abandonment, but a request for confidence.

## Signal 03

# Cart abandonment is often the **pause** before purchase

Two in five High-Value Shoppers abandon their digital shopping cart; a behaviour they are 60% more likely to exhibit than the General Market.

During this pause, they are aggressively seeking external validation (index vs. General Market):

- **2.1x more likely** to use Expert Guides, Reviews, or AR/Virtual Try-on tools.
- **1.9x more likely** to browse Lifestyle and News editorials for social proof.



Ultimately, High-Value Shoppers **prioritise confidence and convenience** over the lowest price:

- **Risk Mitigation:** **+91% more likely** to be influenced by Returns and Warranty policies.
- **Expertise:** **+77% more likely** to choose a store based on Staff Knowledge.
- **The Convenience Kicker:** They are **2x more likely** to prioritise speed of delivery over price.

## Signal 03

The opportunity:

# Own the *pre-purchase* pause

Transition from abandonment retargeting to confidence building. Recognise the digital cart pause as a request for confidence, not a request for a coupon. Use expert buying guides and social proof at the final stage to bridge the gap and protect your margin.

## Case Study:



## SONOS.

Sonos identified that 88% of their digital carts were abandoned due to "Reverse Showrooming", where High-Value Shoppers hesitate over technical compatibility. Instead of generic discounting, Sonos achieved a 12x return on ad spend by replacing coupons with Confidence Triggers, such as a high-visibility 100-day money-back guarantee.



## Signal 04

# Opening the Budget Halo

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Capturing the strategic spontaneous premium

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While 94% of High-Value Shopper transactions include a planned purchase, nearly half (48%) also result in a spontaneous add-on. Once the planned purchase is secured, the Budget Halo opens, and shoppers move into strategic spontaneity.

## Signal 04

High-value Shoppers who add spontaneous purchases spend more than they planned to.

This differs depending on the type of retailer:

- Discount department stores: \$100 more per transaction
- Premium department stores: \$215 more per transaction
- Home retailers: \$503 more per transaction



So what triggers a spontaneous purchase?

- **Algorithm Power:** 2.8x more likely to respond to "Customers also bought.."
- **Human Expertise:** 1.9x more likely to add items based on Salesperson Advice.
- **Fulfillment Logic:** 1.9x more likely to add items to meet Shipping Thresholds.

## Signal 04

### The opportunity:

# Predict the orbit

Capture the spontaneous premium by shifting your focus from selling individual products to offering total vision solutions. Design in-store and digital experiences that proactively recommend high-affinity, complementary items (like accessories or décor) immediately after the main purchase is secured, helping the shopper complete their entire vision in a single transaction.

### Case Study:



## IKEA.

The master of the Total Vision, IKEA uses store layouts and "Shop the Room" digital features to bridge the gap between an Anchor (the sofa) and the Orbits (the rug, the lamp, the cushions). This strategy captures the spontaneous premium by helping the shopper complete their vision in a single journey.

# From detecting intent to unlocking value

Identifying high-value intent is just the first step. Further growth lies in what happens after the planned purchase is secured.



Introducing the

# Spontaneity Index

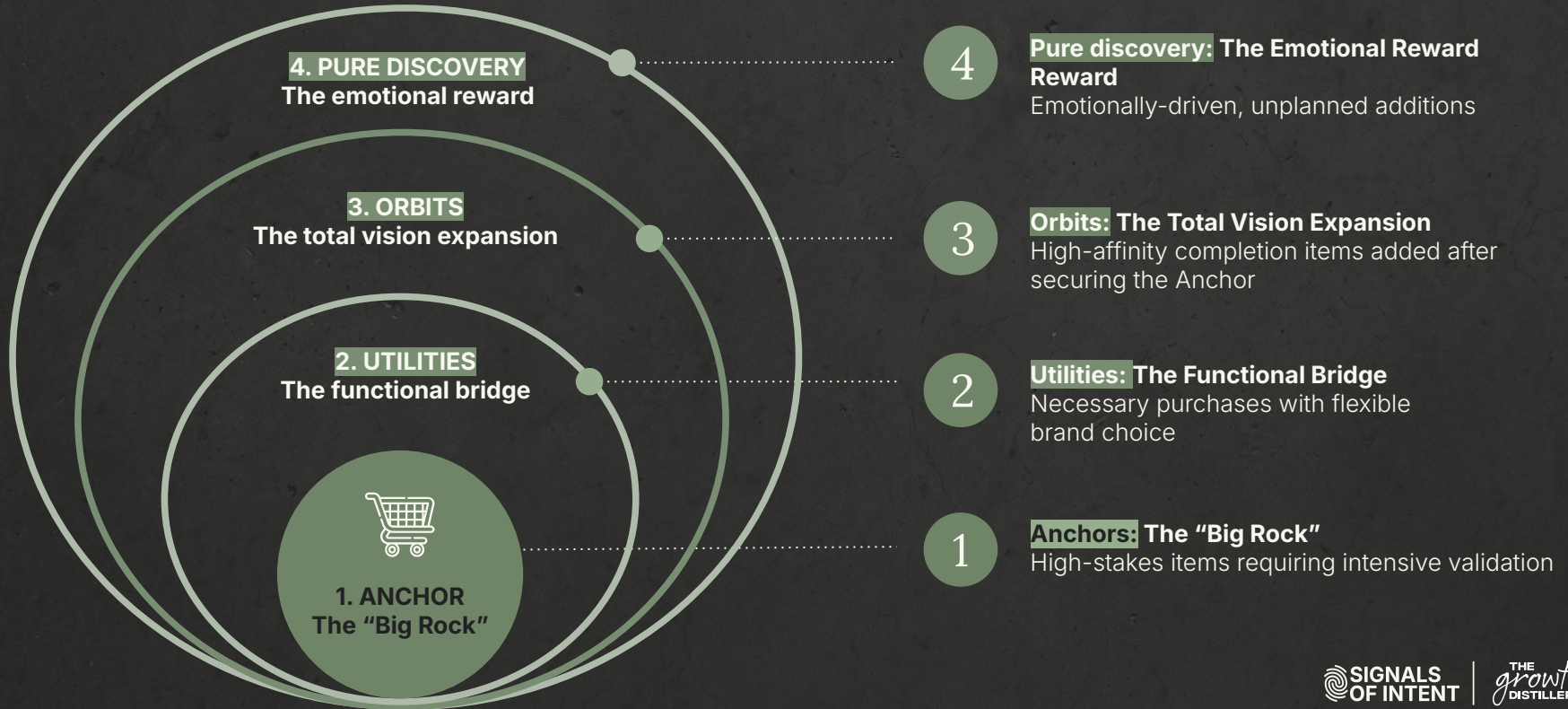
*Predicting the "What" and "Where" of the Journey*

While the Four Signals tell us how the High-Value Shopper behaves, the Spontaneity Index categorises the **evolution of intent**.

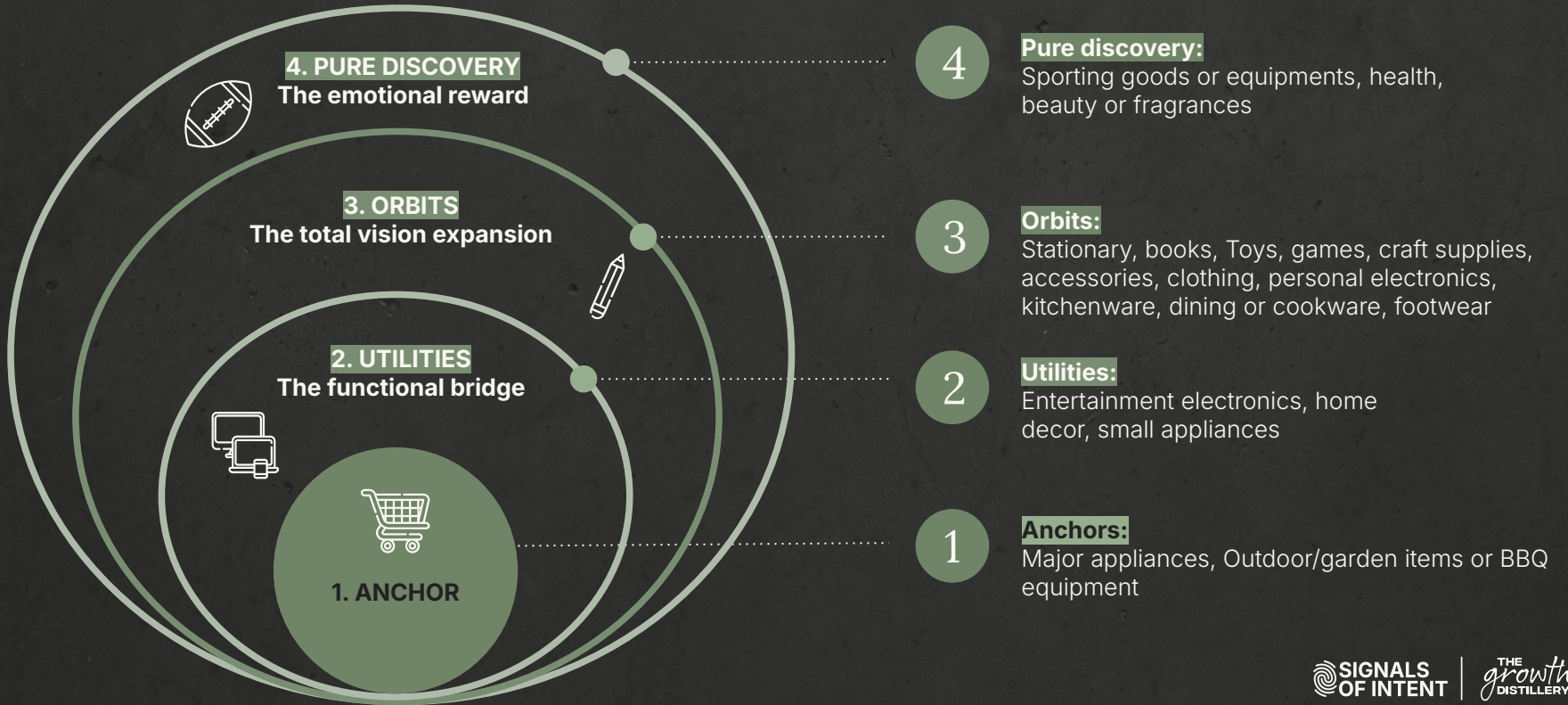
The Index categorises products based on purchase planning behaviour from our survey of 3,000 Australians. For each category, we measured the ratio of planned to unplanned purchases. Higher spontaneity scores indicate categories where shoppers are more receptive to in-store or digital prompts, while lower scores signal mission-driven categories requiring confidence-building before purchase. By mapping this tension, we can predict exactly when a shopper is anchored in a mission and when they are most susceptible to expansion.



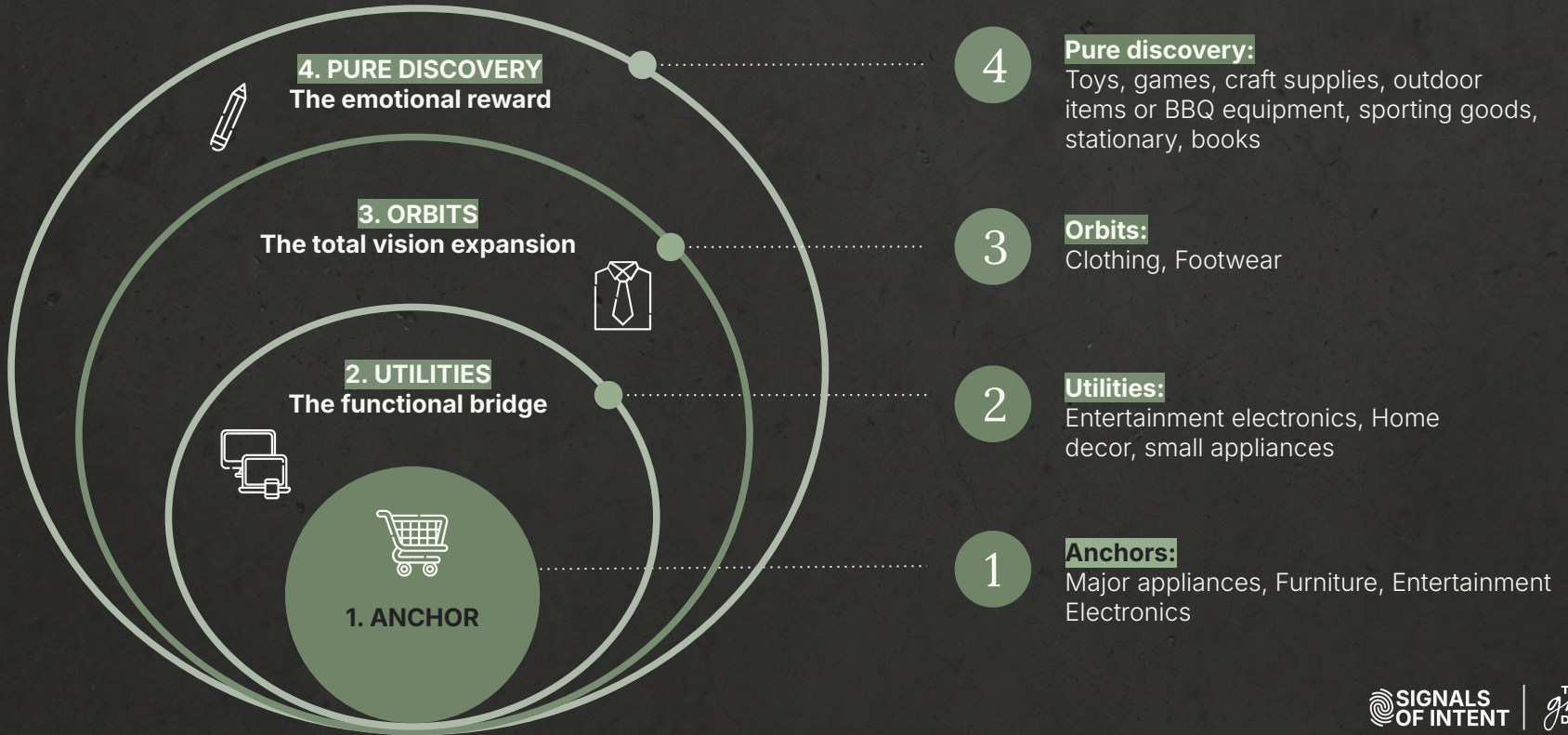
# Mapping the four layers of purchase intent



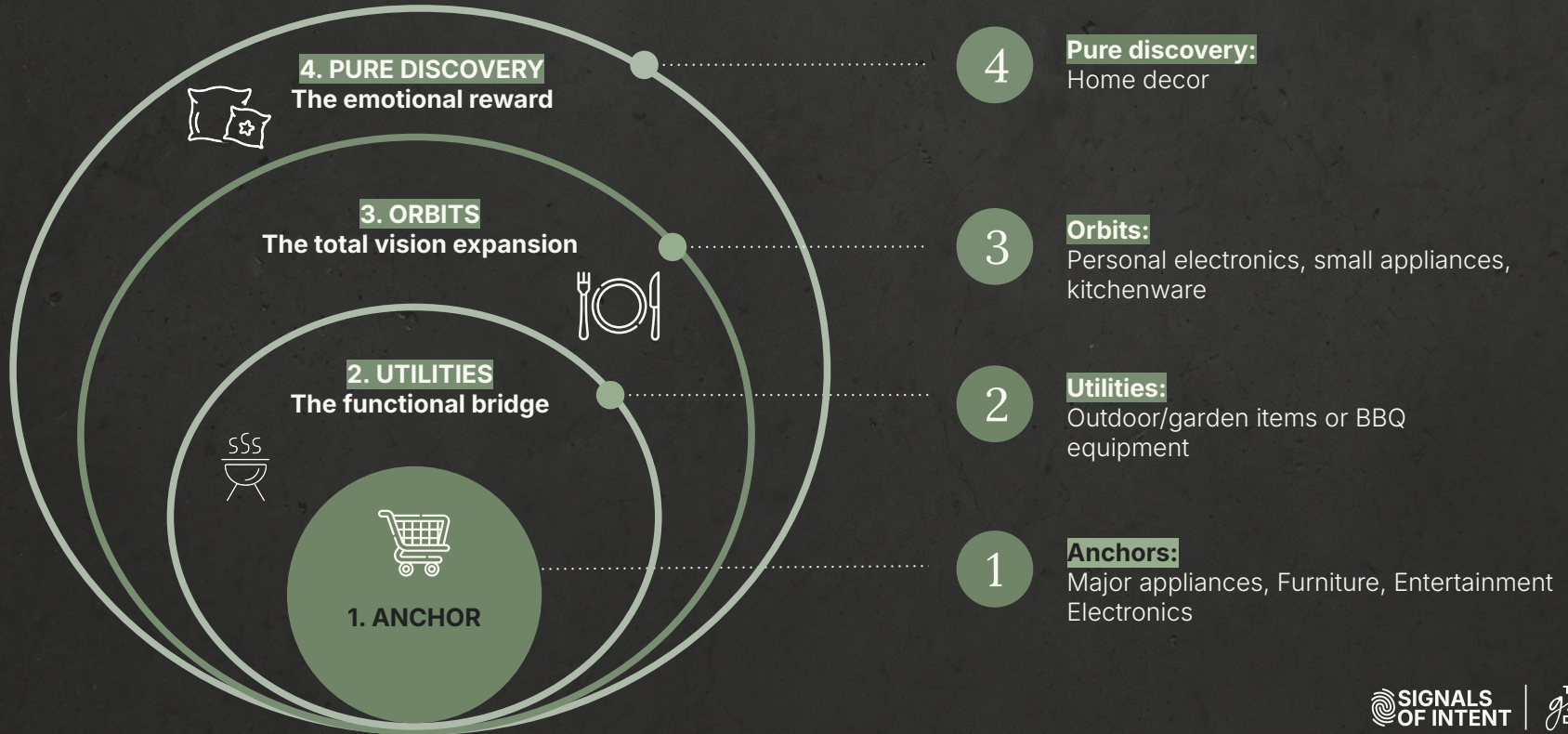
# How this plays out for High-value Shoppers in Discount Department Stores



# How this plays out for High-value Shoppers in Premium Department Stores



# How this plays out for High-value Shoppers in Home Retailers



# Match your marketing investment to *category* behaviour

Low-spontaneity categories demand pre-visit confidence building; high-spontaneity categories capture value in the moment

The Spontaneity Index is not about pushing more products; it's about presenting the **RIGHT** products at the **RIGHT** psychological moment. Respect the mission first, expand the basket second.

	Low Spontaneity	High Spontaneity
Inspiration	Heavy investment: Paid search, content, reviews, comparison tools	Light investment: Brand awareness, lifestyle inspiration
Research	Focus: Confidence & de-risking (warranties, expert help, easy returns)	Focus: Discovery & impulse (merchandising, cross-sell prompts, "complete the look")

# The competitive edge of *Behavioural Intent*

The future of retail growth belongs to the brands that stop chasing the average shopper and start decoding the High-Value journey. By shifting focus from universal triggers to specific behavioural signals, brands can differentiate from the competition and expand consumer baskets.

In a world of infinite choice, the ultimate competitive advantage isn't a lower price, it is the precision to identify and serve High-Value shoppers before they even enter the store.



# Want to know more?

Ready to unlock the growth potential of your brand? Good, so are we. **The Growth Distillery** pulls marketers out of chaos and cuts through the clutter, providing the 'need to know' of consumer behaviour.

[www.thegrowthdistillery.com.au](http://www.thegrowthdistillery.com.au)

