# VIZIT

The State of Digital Shelf Imagery 2022

How Brands and Retailers Are Striving to Create
Better Visuals for Today's Digital Consumer

Ecommerce has never been more crucial to retailers and brands' bottom lines. It has also never been harder to stand out on the overcrowded digital shelf.

When consumers visit Walmart or Amazon, dozens of brands compete for their attention. With new brands coming on the scene almost daily, and listing placements changing in real-time based on SKU performance, brand marketers and ecommerce teams must act fast to ensure their products rank high in search results pages and keep the buy box.
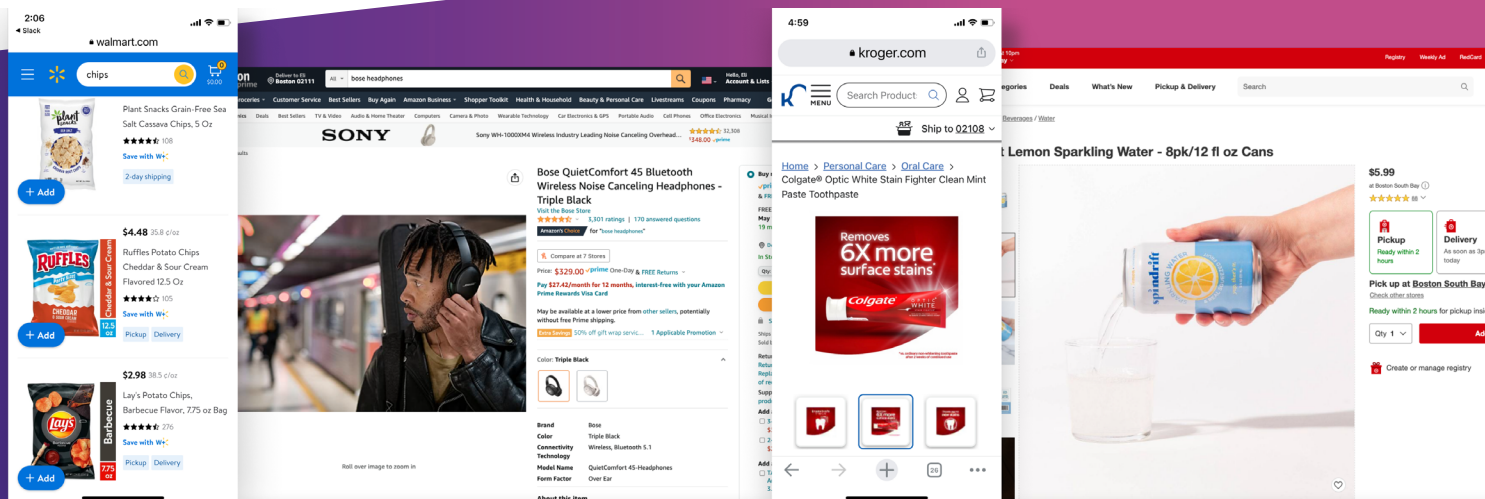
Retailers need to provide frictionless experiences to ensure shoppers return — because unlike in the brick-and-mortar world, a competitor's virtual shopping aisle is only ever a few clicks away.

Images are central to ecommerce decisions.

30% of US shoppers say they will not make a purchase if images are missing or of low quality, according to research by Salsify.

Nearly half of US shoppers ranked quality images and product descriptions among the top three factors guiding their decisions about where to shop. As the last ecommerce lever without in-depth analytics options, imagery is the next great differentiator for brands. Selecting the right images and optimizing them to engage target audiences is vital to maintaining a competitive edge online.

Consumers' expectations have never been higher, in part because ecommerce activity has dramatically increased, and many more brands are selling online. Algorithms and machine learning have made consumers used to personalized experiences when they stream content, scroll their social media feed, and visit online marketplaces such as Amazon.
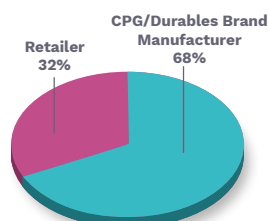
Producing attractive images to demonstrate product strengths and capture consumer attention can prove challenging. Proper images speak to multiple audiences whose preferences may differ widely. They must communicate with diverse retailers, often with different specifications for collecting, organizing, and acting on data. All of this adds up to a complex process that many brands and retailers have yet to master. This means brands and retailers need to optimize images in order to speak to the preferences of different constituencies, something traditional image design processes cannot accomplish at scale.
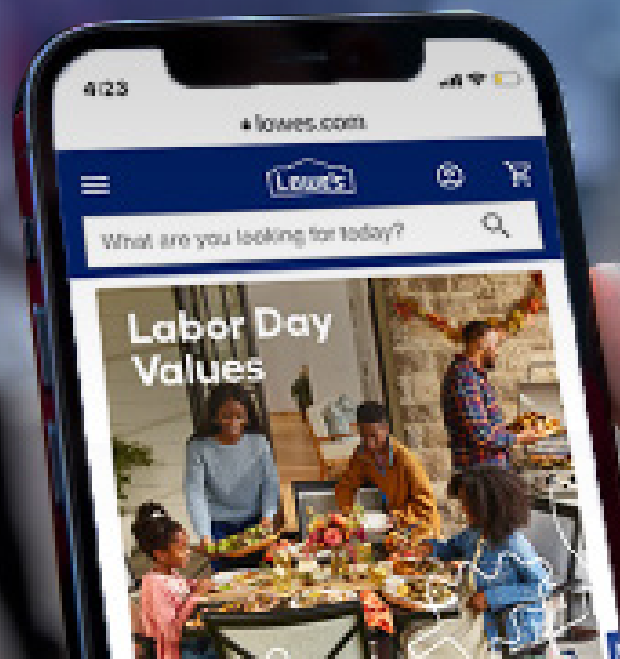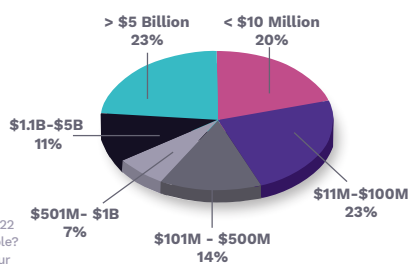
Imagery – the Trillion Dollar Sales Opportunity too Big for Brands & Retailers to Ignore.

Sample Profile

Organization Type
- Retailer 32%
- CPG/Durables Brand Manufacturer 68%

Company Revenue
- > $5 Billion 23%
- < $10 Million 20%
- $1.1B-$5B 11%
- $501M- $1B 7%
- $101M - $500M 14%
- $11M-$100M 23%
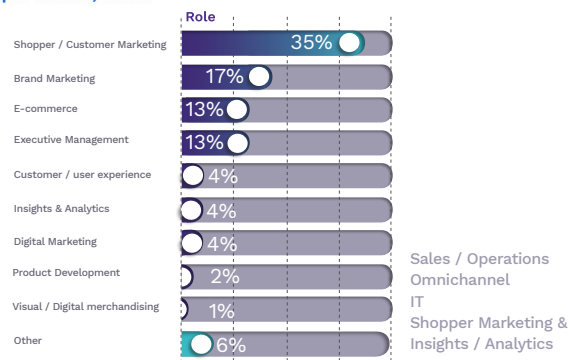
Data Source: Vizit Future Forward Study, April 2022
S4. Which of the following best describes your role?
S5. And which of the following best describes your title or responsibility level?

Sample Profile, cont.

Role
- Shopper / Customer Marketing — 35%
- Brand Marketing — 17%
- E-commerce — 13%
- Executive Management — 13%
- Customer / user experience — 4%
- Insights & Analytics — 4%
- Digital Marketing — 4%
- Product Development — 2%
- Visual / Digital merchandising — 1%
- Other — 6%

Sales / Operations
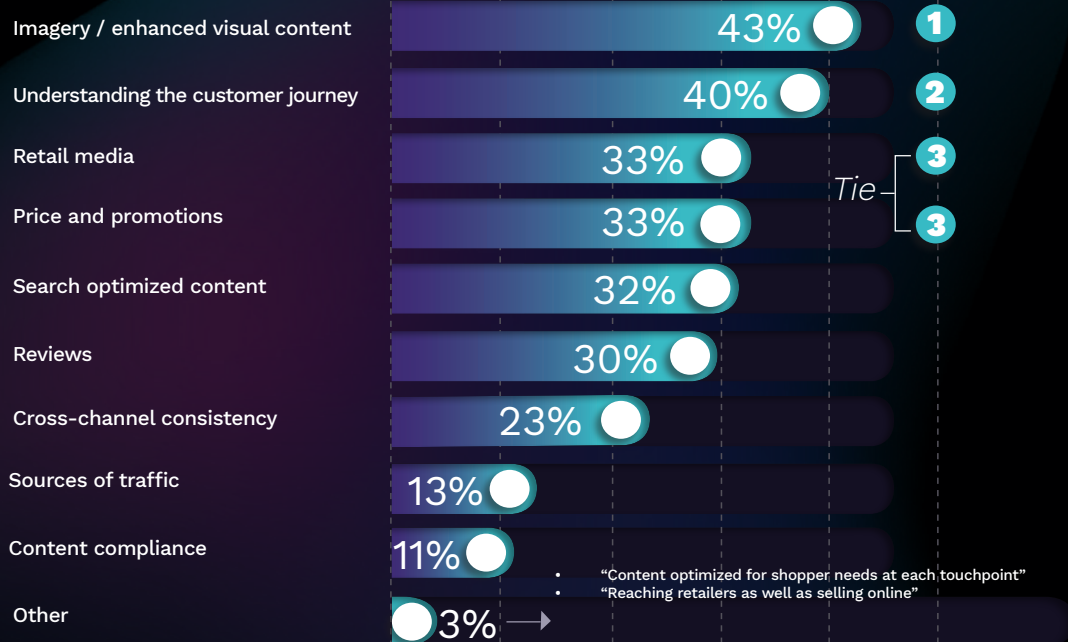Omnichannel
IT
Shopper Marketing & Insights / Analytics

With global ecommerce retail sales expected to reach $7.4 trillion by 2025, CPG and retail professionals are looking for every angle to capture those dollars and have identified enhanced visual content as the top area of opportunity for optimization on the digital shelf, beating out options such as retail media, pricing and promotions, and search-optimized content according to a 2022 survey conducted by Vizit, the Path to Purchase Institute and Retail Leader. While the results clearly demonstrate the opportunity for both suppliers and retailers with imagery, they also highlight the challenges being faced internally and in partner collaboration as both sides desperately seek a way to create more relevant imagery in a way that is mutually beneficial for both parties.

Imagery / enhanced visual content is the primary area of opportunity within digital shelf optimization identified by professionals with visual content strategy or creation roles. Over one-third say it is one of the most chalenging levers to measure.

Biggest areas of opportunity within digital shelf optimization

Lever	%	Rank
Imagery / enhanced visual content	43%	1
Understanding the customer journey	40%	2
Retail media	33%	3
Price and promotions	33%	3
Search optimized content	32%	
Reviews	30%	
Cross-channel consistency	23%	
Sources of traffic	13%	
Content compliance	11%	
Other	3%	

Tie (between Retail media and Price and promotions)

- "Content optimized for shopper needs at each touchpoint"
- "Reaching retailers as well as selling online"

Most challenging to measure

Lever	%	Rank
Imagery / enhanced visual content	36%	2
Understanding the customer journey	42%	1
Retail media	27%	
Price and promotions	18%	
Search optimized content	27%	
Reviews	13%	
Cross-channel consistency	33%	3
Sources of traffic	28%	
Content compliance	19%	

Brands and retailers are looking for ways to improve imagery to boost online conversions, but what do shoppers want from visual content? What trends are shaping image consumption and its impact on shopping behavior? How have brands approached image measurement and design to this point, and how are practices evolving? What tools do ecommerce professionals need to design more powerful visuals, better measure image effectiveness, and optimize? And what real-world proof is there that optimizing visuals is worth it?

Dive into the rest of this ebook on visual optimization to find out.

Images Can Make All the Difference, and Consumers Are Inundated with Them

Images are truly everywhere consumers turn. The average person scrolls through 300 feet, or one statue of liberty, of mobile content every day according to Ogilvy's creative director Andrew Keller. Other statistics indicate the average person is exposed to 6-10,000 ads each day according to ppcprotect.com.

Consumers' immersion in images is creating a dynamic where people don't read anymore — they recognize — instantaneously and unconsciously responding to images before their mind can even process words to make decisions. This means that even if a brand perfected product descriptions, search, reviews, inventory, and pricing, the wrong visual content could mean millions in lost annual sales. This exposure to imagery has an impact when consumers shop for products online — as consumers themselves attest:

93% of consumers say visual content is the key deciding factor when making a purchasing decision.

https://www.bigcommerce.com/blog/word-of-mouth-marketing/#create-an-epic-experience-first

76% of consumers say they've purchased a product or service after watching a video.

* 2021 Gen.Video Research

95% of purchasing decisions happen when the subconscious brain is processing visual information.

https://www.inc.com/logan-chierotti/harvard-professor-says-95-of-purchasing-decisions-are-subconscious.html

95% of consumers who click on an image carousel look at every image.

https://www.onespace.com/blog/2019/11/a-brands-guide-to-creating-product-image-carousels-that-convert/

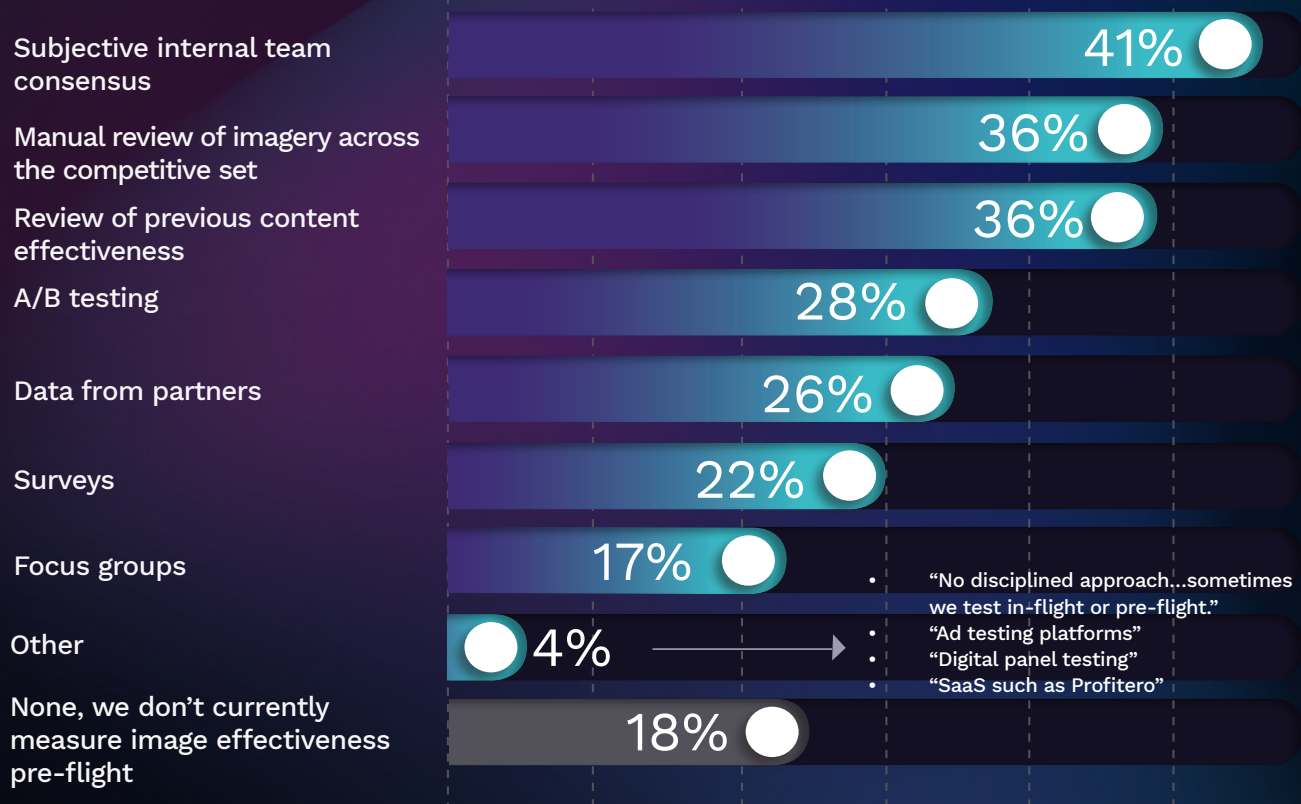# How Brands are Approaching Image Design and Measurement

Traditional research methods for image design and measurement are relatively slow and subjective. Those approaches include A/B testing, surveys, and panels. They rely on creative intuition, which will always have a role in the marketing process but is better supported in today's data-driven environment by timely metrics indicating actual consumer preferences.

Conventional visual optimization methods can only achieve so much scale. Marketers can ask a few thousand consumers how they feel about one cereal box design compared to another. They cannot rely on a survey to capture how dozens of different audiences of different socioeconomic backgrounds, genders, and ethnicities are likely to feel about distinct designs.

Technologies are now available to help marketers assess the effectiveness of images based on millions of data points, letting them predict how visuals will perform with the diverse audiences that comprise their customer base. Meanwhile, **fewer than three in 10 visual content professionals use any objective measures of visual image effectiveness pre-flight** according to that same 2022 Vizit, Path to Purchase and Retail Leader survey. The majority of visual content professionals, including shopper and customer marketers, brand marketers, ecommerce professionals, and executives in CPG and retail, said they use subjective visual optimization strategies, including team consensus, manual review of competitive imagery, and review of previous content performance.

Less than 3-in-10 visual content professionals **surveyed say they use any objective measures** of visual image effectiveness pre-flight. The majority report using subjective strategies, including team consensus, manual review of competitive imagery, and review of previous content performance.

Strategies or tactics used to measure visual image effectiveness pre-flight

Strategy	Percentage
Subjective internal team consensus	41%
Manual review of imagery across the competitive set	36%
Review of previous content effectiveness	36%
A/B testing	28%
Data from partners	26%
Surveys	22%
Focus groups	17%
Other	4%
None, we don't currently measure image effectiveness pre-flight	18%

- "No disciplined approach...sometimes we test in-flight or pre-flight."
- "Ad testing platforms"
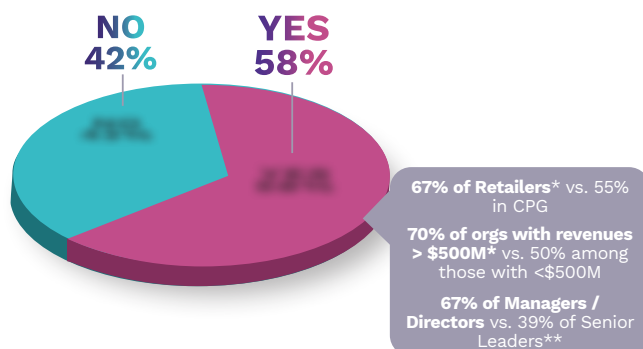- "Digital panel testing"
- "SaaS such as Profitero"

Data Source: Vizit Future Forward Study, April 2022
Q6. What strategies or tactics are you currently using to measure visual image effectiveness pre-flight?

The process by which many professionals optimize visuals appears to leave ample room for improvement. Around 4 in 10 visual content professionals surveyed said they lack useful collaboration with their partners when it comes to improving the effectiveness of their imagery. Those respondents cited inconsistency in communication about image constraints and effectiveness as obstacles. Limited bandwidth was also a significant issue, as they lack the time to conduct the research required to optimize perhaps thousands of visuals across products, platforms, and channels.
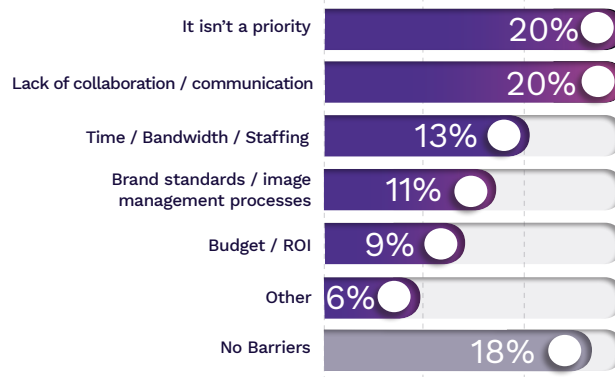
Around 4-in-10 visual content professionals surveyed **say they do not have good collaboration with their partners when it comes to improving imagery effectiveness.** Collaboration is hampered by a variety of roadblocks, including **differing priorities** and an **overall lack of communication & collaboration** on the topic.

Is there good collaboration between you and your partners?

NO 42%   **YES 58%**

67% of Retailers* vs. 55% in CPG

70% of orgs with revenues > $500M* vs. 50% among those with <$500M

67% of Managers / Directors vs. 39% of Senior Leaders**

Data Source: Vizit Future Forward Study, April 2022
Q9. Do you feel there is good collaboration between you and your partners (retail or supplier) when it comes to improving the effectiveness of imagery for specific retail platforms?
Q10. What is preventing better collaboration on image effectiveness between you and your partners?

What is preventing better collaboration?

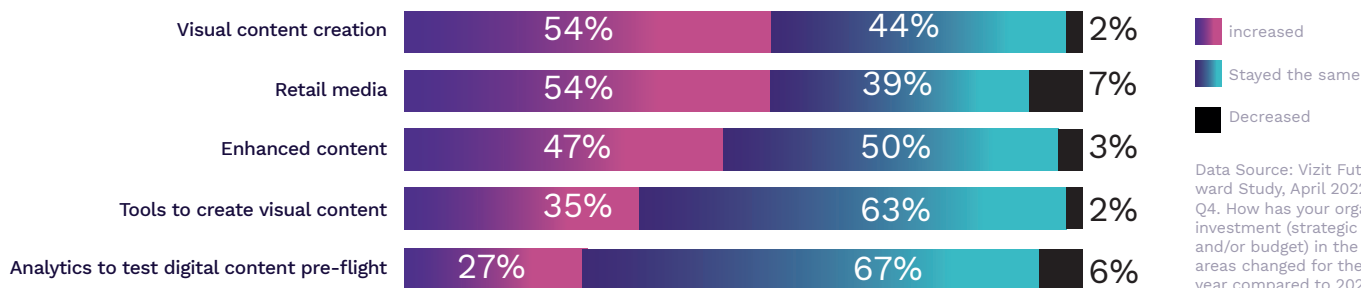|	
It isn't a priority	20%
Lack of collaboration / communication	20%
Time / Bandwidth / Staffing	13%
Brand standards / image management processes	11%
Budget / ROI	9%
Other	6%
No Barriers	18%

*Small sample size (30-50n). Interpret data with caution.
**Very small sample size (<30n). Insights are directional only.

While over half of the visual content professionals said their organizations are investing more in visual content creation, **only slightly more than one quarter are investing more in analytics to test digital content pre-flight. This approach risks leaving major conversion gains on the table.** Brands and retail marketing teams may remain mired in the same conventional, hard-to-scale tactics.

Over half say their organization's investment in **visual content creation** and **retail media** have increased this year, while around one-third or less say the same about tools to create visual content or analytics to test content pre-flight.

How has your organization's investment in these areas changed for the coming year?

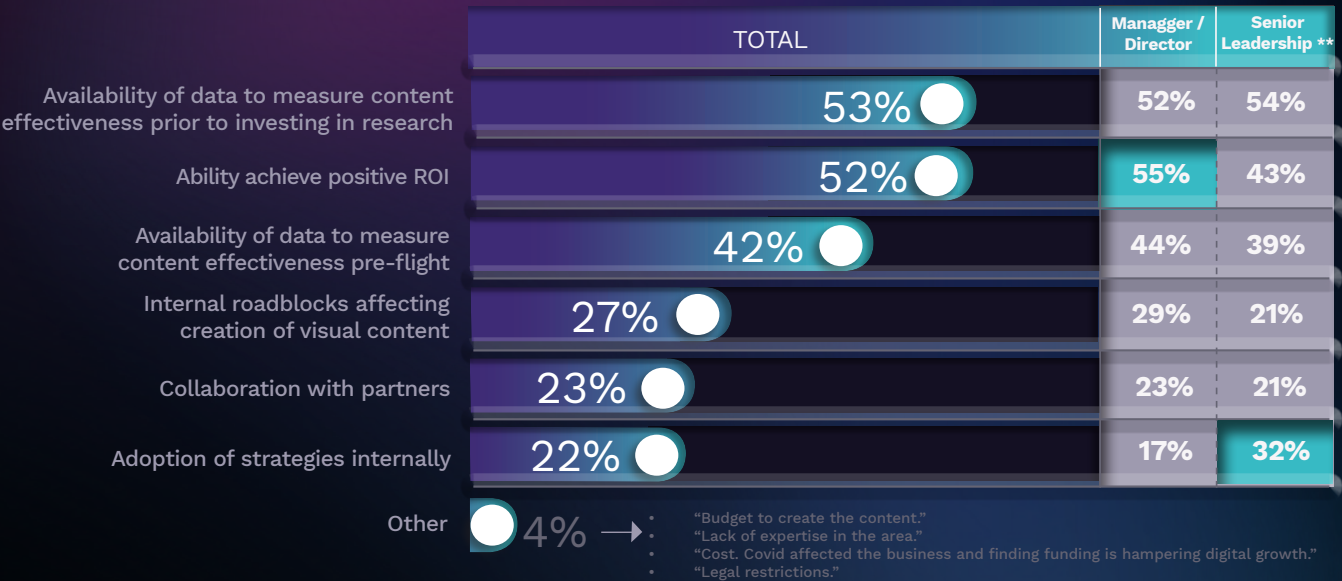|	increased	Stayed the same	Decreased
Visual content creation	54%	44%	2%
Retail media	54%	39%	7%
Enhanced content	47%	50%	3%
Tools to create visual content	35%	63%	2%
Analytics to test digital content pre-flight	27%	67%	6%

Data Source: Vizit Future Forward Study, April 2022
Q4. How has your organization's investment (strategic focus and/or budget) in the following areas changed for the coming year compared to 2021?

Professionals stated the top two roadblocks to visual content investments are lack of data to measure content's effectiveness prior to investing in research along with their concerns around their ability to achieve positive ROI.

Most agree that the **availability of data to measure effectiveness before investing in further research** and the **ability to achieve a positive ROI** are the biggest concerns or roadblocks to their visual content creation strategy. Senior leaders also seem to be concerned about the adoption of strategies internally.

Biggest concerns or roadblocks when considering your visual content creation strategy

	TOTAL	Managger / Director	Senior Leadership **
Availability of data to measure content effectiveness prior to investing in research	53%	52%	54%
Ability achieve positive ROI	52%	55%	43%
Availability of data to measure content effectiveness pre-flight	42%	44%	39%
Internal roadblocks affecting creation of visual content	27%	29%	21%
Collaboration with partners	23%	23%	21%
Adoption of strategies internally	22%	17%	32%
Other	4% →		

"Budget to create the content."
"Lack of expertise in the area."
"Cost. Covid affected the business and finding funding is hampering digital growth."
"Legal restrictions."

Data Source: Vizit Future Forward Study, April 2022
Q5. When you think about your visual content creation strategy, what are your biggest concerns or roadblocks?   **Very small sample size (<30n). Insights are directional only.

This means that to transcend the status quo, brands and retailers require proof of impact to convince their organizations to acquire the data-driven tools that will help them craft more effective visuals at scale.

How Attitudes toward Visual Optimization Differ Across Retailers and CPGs

While many CPGs and retailers have not yet transformed their conventional visual design and analytics processes, many see the opportunity in making those investments. **Enhanced visual content is the primary area of opportunity professionals see to optimize digital shelf performance.** Those professionals named visual optimization as a top digital shelf optimization opportunity, eclipsing the need to understand the customer journey. One-third of respondents said enhanced visual content is one of the most challenging aspects of digital shelf optimization to measure, showing awareness of the scale of the challenge and the need for powerful tools to do the job.

Retailers and CPGs were fairly aligned in the frequency with which they named visual optimization as a top opportunity. Beyond visual optimization, retailers were focused on pricing and promotions as well as the customer journey, while CPGs were attentive to the opportunity of promoting their products via retail media.

There is overlap in retail and CPG professionals' intentions to invest in retail media and visual optimization. This suggests that **retailers and CPGs are not just spending on visual design and analytics to improve product detail pages. They also want to improve visuals so that their ads stand out and drive clicks.**

Retailers and CPGs report increasing their investments in tools to create visual content and test that content's effectiveness pre-flight. But the two differ considerably in their investments in visual content creation. Sixty percent of CPGs say they are investing more into visual content creation, while only 43% of retailers say the same.

Those in **CPG** organizations are significantly more likely to say their **investment in visual content creation** has **increased** for 2022. **Enhanced content** seems to have more investment within organizations **whose revenues exceed $500M**, while those in organizations with **<$500M in revenue** indicate having greater investment in **tools to create visual content** this year.

How has your organization's investment in these areas changed for the coming year? Showing % Increased

	Organizarion Type		Company Revenue		Role	
	CPG	Retailers*	Revenue <$500M	Revenue >$500M*	Revenue <$500M	Revenue >$500M*
Visual content creation	60%	43%	57%	51%	52%	61%
Retail media	55%	53%	54%	56%	52%	61%
Enhanced content	48%	47%	41%	56%	46%	50%
Tools to create visual content	36%	33%	39%	29%	35%	36%
Analytics to test digital content pre-flight	27%	27%	25%	29%	29%	21%

Data Source: Vizit Future Forward Study, April 2022
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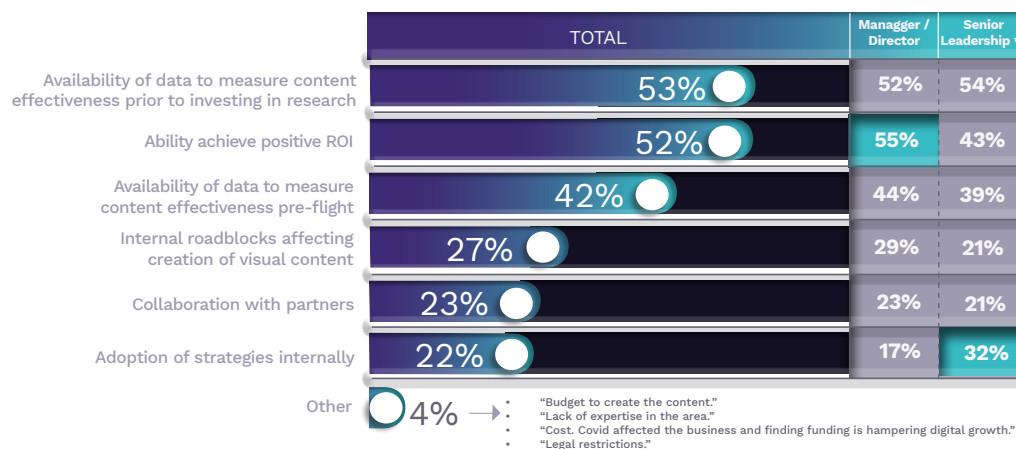**Very small sample size (<30n). Insights are directional only.

Finally, it appears that executives are more likely than junior professionals to say their organizations rely on subjective methods to understand image effectiveness. The discrepancy between senior and junior officials might indicate that executives are more distanced from the technologies lower-level professionals are using to design and measure images, or it could suggest that executives are less bullish on the state of their teams' visual optimization practices. Organizations with larger revenues (>$500M) and those in manager or director roles are more likely to indicate using more objective measurement tools.

The AI-Driven Future of Visual Optimization in Ecommerce

CPG and retail professionals identify the opportunity to provide organizations with more tools for measuring visual image effectiveness. Over half of professionals surveyed stated that tools providing more detail about what makes an image effective would be useful. They also stated that they would value real-time visual analytics, defined visual standards and benchmarks, and access to faster consumer testing methods.

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Data Source: Vizit Future Forward Study, April 2022
Q5. When you think about your visual content creation strategy, what are your biggest concerns or roadblocks?

**Very small sample size (<30n). Insights are directional only.

The current pace of visual design and measurement analytics falls short amidst intense ecommerce competition. Over one-third of respondents stated it takes three to four weeks to create content and measure its effectiveness pre-flight. A slightly larger group stated that it takes five to eight weeks, and a minority stated that for them, the process takes over two months. Long wait times were especially common among CPG professionals, nearly a quarter of whom stated creating content and measuring it preflight takes six to eight weeks.

Half of professionals surveyed **say it takes 1-4 weeks to create content and measure its effectiveness** pre-flight. This is particularly true among retailers and those with lower company revenues (<$500M).

How long does it typically take to create content and measure its effectiveness pre-flight?

16%	34%	19%	19%	11%
One to two weeks	Three to four weeks	Five to six weeks	six to eight weeks	more than two months
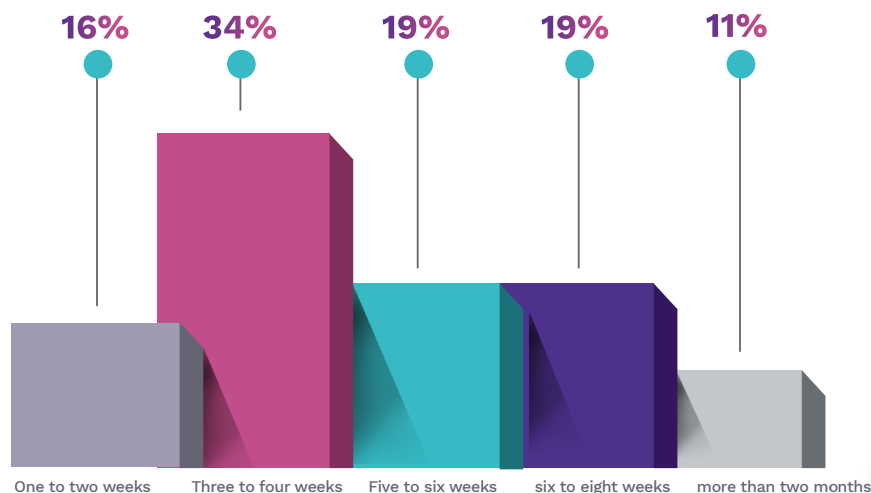
	Organizarion Type		Company Revenue	
	CPG	Retailer*	Revenue <$500M	Revenue >$500M*
1-2 weeks	12%	27%	21%	10%
3-4 weeks	31%	40%	36%	32%
5-6 weeks	22%	13%	18%	22%
6-8 weeks	22%	10%	14%	24%
>2 months	12%	10%	11%	12%

Data Source: Vizit Future Forward Study, April 2022
Q7. How long does it typically take to create content and measure its effectiveness pre-flight?

*Small sample size (30-50n). Interpret data with caution.

Ecommerce Innovation Across the Path to Purchase: Ecommerce Veteran Shares his Image Journey Across CPG Categories

Greg Yeadon, VP of ecommerce at consumer products lifestyle company Kadenwood and the Path to Purchase Institute's 2021 ecommerce Innovator of the Year, was working at Central Garden & Pet when the company brought in visual analytics platform Vizit to assess the effectiveness of its carousel imagery.

While many of us are familiar with the corporate branding preference for a color like blue, most of us would fail to predict that an aesthetic choice like putting multiple cats in an ad instead of one would drive a significant difference in sales.

VETERINARIAN
RECOMMENDED

Cat Product Category Shoppers

93.7 Very High
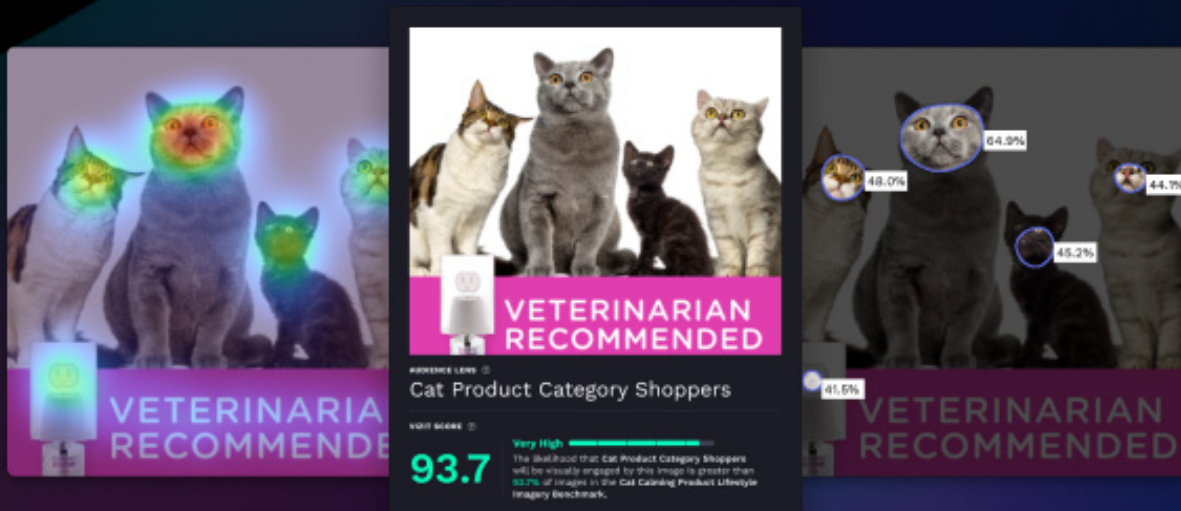
Vizit's AI-driven solution, which leverages millions of data points to assess how consumers respond to visual nuances in product presentation, indicated that showing multiple cats within an image would outperform those images showing only one. Central Garden & Pet made the change, generating an uplift in conversions of more than 30%, Yeadon said.

Marketers can test images pre-flight almost instantaneously, and get the data they need to inform design, better measure performance, and optimize on the fly, testing and learning to stand out on the digital shelf and beat the competition.
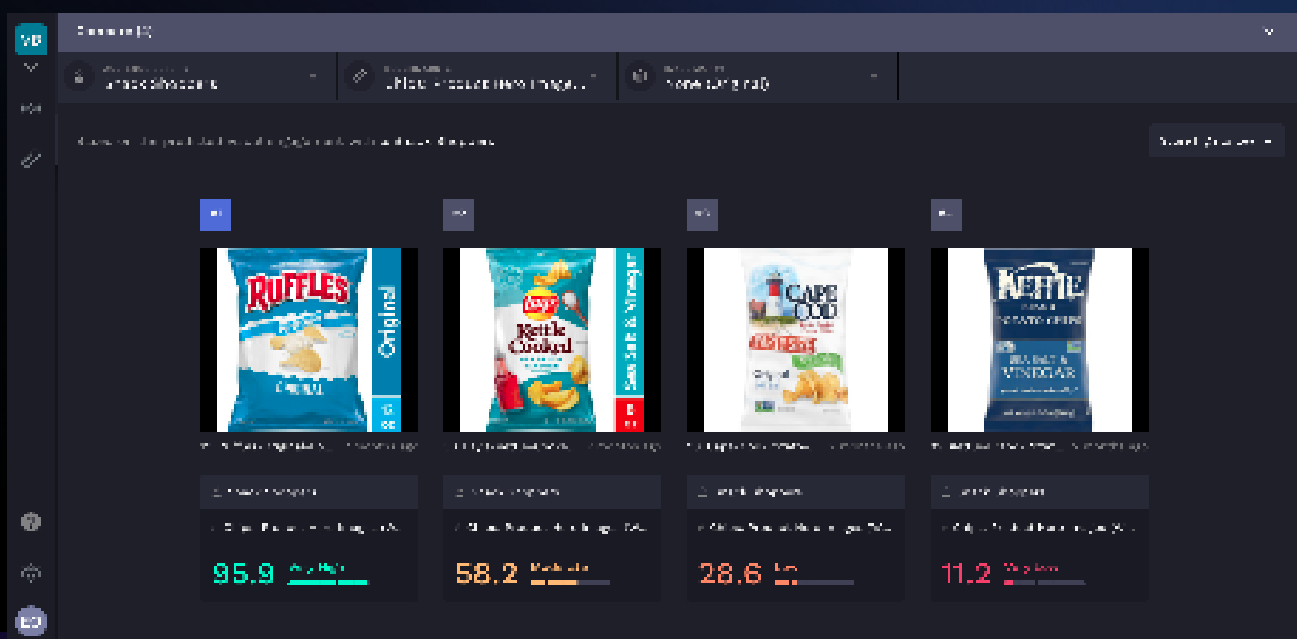
The AI-driven future of visual optimization is not limited to ecommerce product detail pages, either. Yeadon, who also used Vizit's visual analytics technology to boost conversions for certain products by more than 100% at Clif Bar, stated that brands and retailers can use visual analytics to sharpen digital advertising, develop better packaging for the digital and physical shelf, and optimize mobile hero images.

Marketers can also leverage visual analytics in concert with other digital shelf optimization factors such as search optimization, pricing, and copy to determine the ideal mix required to boost conversions. **Multi-pronged ecommerce optimization becomes possible when visual experimentation is scalable and immediate.**

Many brands and retailers are eager to learn and experiment in order to drive commerce. With the right tools at their disposal, they'll be equipped to leverage the data required to grow their business and delight their customers.
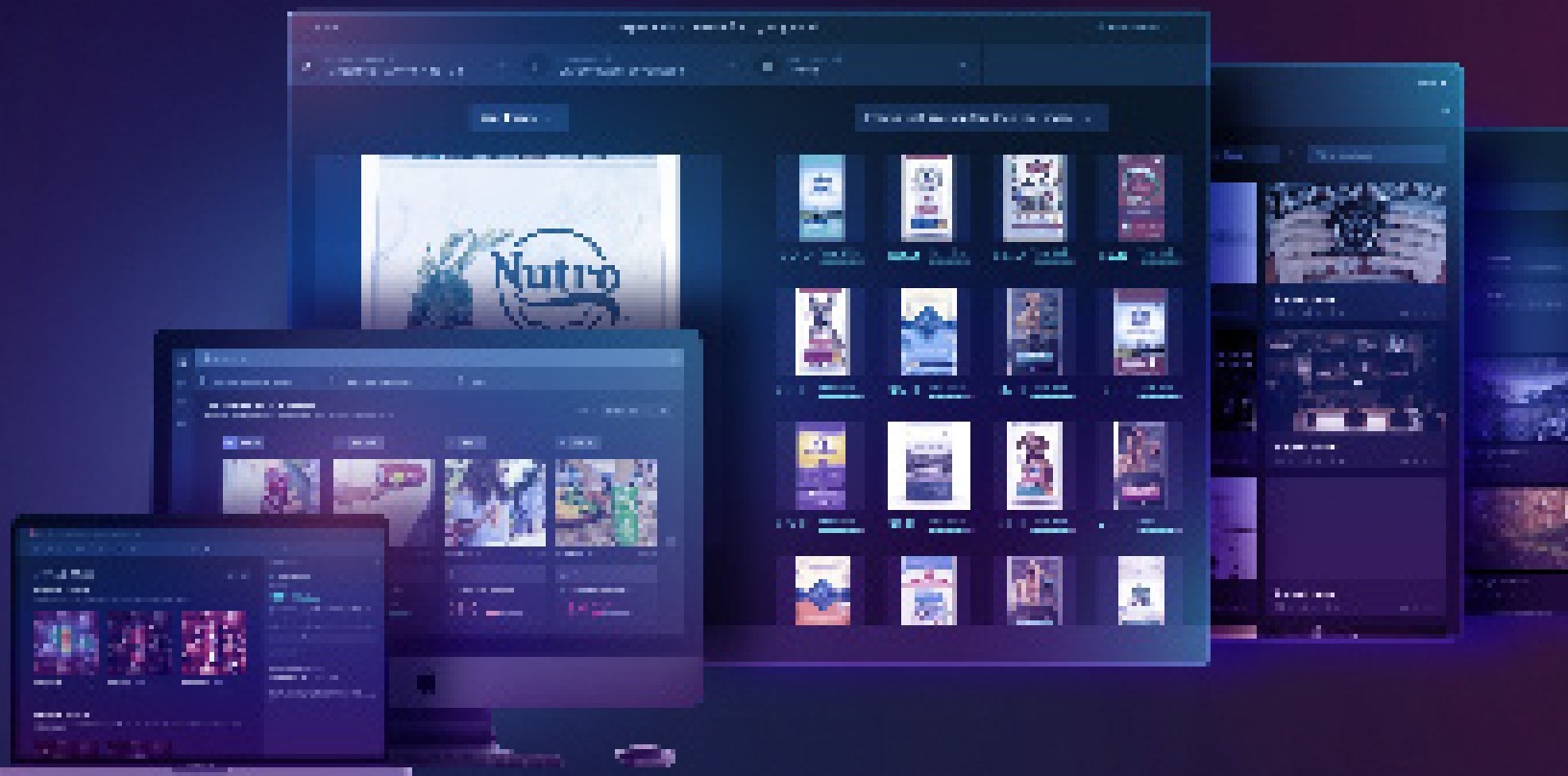
Learn More

How does each brand and retailer make similar assessments for each of their products across dozens of different audience types and platforms? If you're a brand or retailer struggling with just that, you're not alone. Dive into the Vizit, Path to Purchase Institute and Retailer Leader State of Digital Shelf Imagery 2022 survey to get more insights on the challenges brands and retailers face when it comes to visual optimization.

Access the full results at https://go.vizit.com/stateofdigitalshelfimagery2022

VIZIT

Vizit is the Global Leader in Predictive Image Analytics. Vizit helps the world's largest brands and retailers win the race for consumer attention through a patented AI-powered Visual Brand Performance Platform that enables teams, anywhere in the world, to measure, manage, and optimize their image effectiveness at every step of the consumer journey.

Learn more at vizit.com