



THE ECOMMERCE MARKETER'S GUIDE TO



Advanced Audience Targeting



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Privy



What's In This Guide?

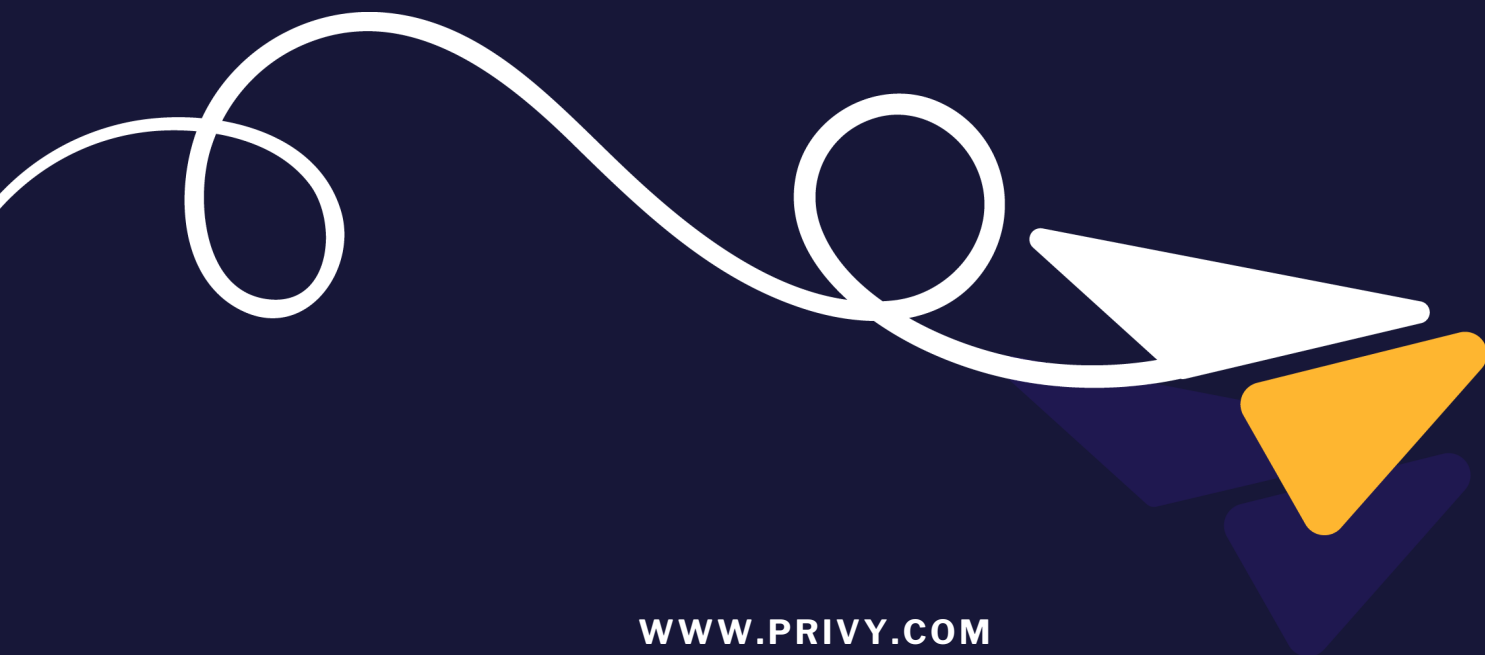
Why, when, and how to improve your store conversion rates with targeted on-site displays that reach the right person with the right message at the right time.

Introduction

Why: What you know about your customers and how to use it

When: Display triggers and when to use them

How: Building advanced targeting rules in Privy and specific use cases



Introduction

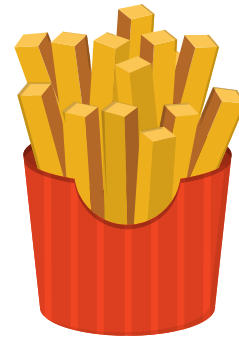
Most online businesses are pretty bad at conversion. It's sad, but true.



We strive to convert 2-3% of site visitors into email subscribers and paying customers and we're thrilled if we can get close to that number.

That's because we spend a lot of time thinking about how to drive people to our stores or websites through different channels, but we don't spend nearly enough time focusing on how to interact with them once they get there.

Most sites, even the leading ecommerce brands, treat each person who visits our site the same way with the same offer, the same welcome message, and the same exit intent pop up.



We're the digital equivalent of a fast food chain employee asking everyone who comes into line if they'd like fries with their order.

By taking advantage of the detailed information we know about our site visitors, we can do better. Much better.

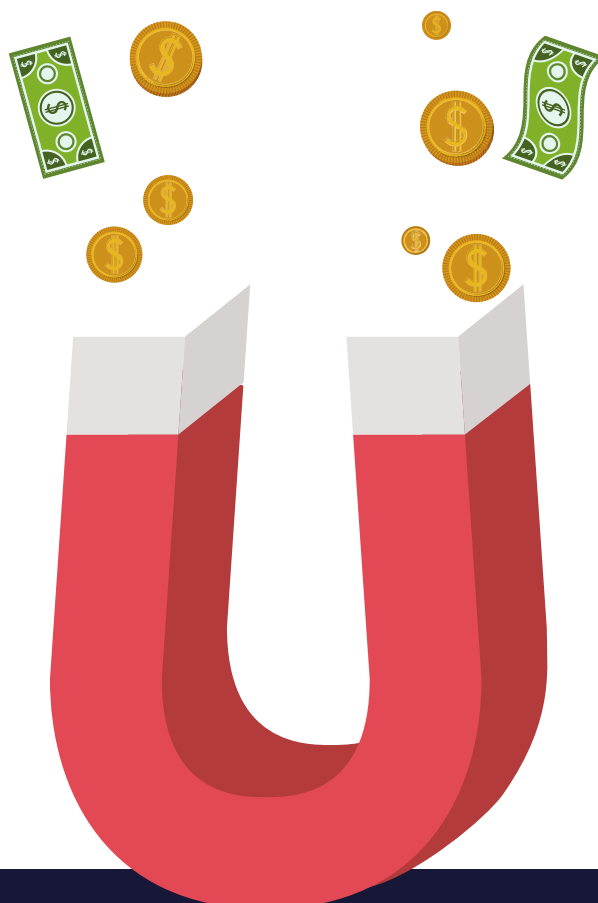
Forget conversion rates, we're talking about real dollars that can flow to the bottom line when we take our on-site display strategies a step or two further.

Let's illustrate it with some simple math. Imagine that every time someone makes a purchase from your site, they spend \$30.

Daily Traffic	Site conversion rate (sales only)	Average Sale	Annual Revenue
1000	1%	\$30	\$109,500
1000	2%	\$30	\$219,000
1000	3%	\$30	\$328,500

By improving your conversion rate via targeted messages, you can significantly impact your business without spending any more money to drive traffic to your site. In fact, just improving your conversion rate from 1%-3% can have an impact of over \$200,000 on your business.

This guide will show you why, when, and how to target your on-site displays — pop ups, flyouts, banners, bars, and more — to deliver the right message to the right visitor at the right time and drive better conversion for your online store.



1. The Way

What You Know About Your Visitors

Unlike a clerk in a retail store who knows nothing about each person who walks through the door, online you have the ability to know a lot about a person visiting our site without having to ask any questions.

And you can use that information to create a relevant experience for them each and every time they visit your site.

Things like:

- Where did they come from?
- Is this their first visit?
- What page are they viewing?
- How many pages have they looked at?
- What language do they speak?
- What device are they using?
- How much is in their cart?



To illustrate the point, let's imagine that your online store sells women's clothing and you want to offer a 10% discount to new customers who sign up for your email list.

Using the information you already know, you can create a bunch of versions of your core message that will drive more people to read and interact with your displays.

Question	What we know	Messaging Strategy
Where did they come from?	The visitor clicked on an Instagram ad featuring a specific blue swimsuit . Try featuring the product that they already expressed interest in within your message.	"Looking for a new swimsuit? Get 10% off your first purchase by entering your email below."
Is this their first visit?	They have visited before but have never bought anything from you. Don't treat them like a stranger!	"Welcome back to my store! We've just launched a new product line. Sign up below to get 10% off your first purchase."
What page are they on?	They are on the "About" page of your site and not actually shopping. Try a "stay in touch" message over a discount.	"Sign up to hear about new products and special offers."
How many pages have they looked at? AND How much is in their cart?	They have looked at 7 different pages in your store without adding anything to their cart, which means they are browsing but are not yet sold.	"Having trouble finding what you are looking for? Sign up and we'll let you know when we launch new products and give you a 10% discount for your first purchase."
What language do they speak?	The visitor's primary language on their browser is spanish.	"¡Bienvenidos a mi tienda! Regístrese abajo para obtener un 10% de descuento en su primera compra."
What device category are they on?	The visitor is on a mobile device, which is a great cue to slim down your text.	"Sign up today for 10% off your first purchase."



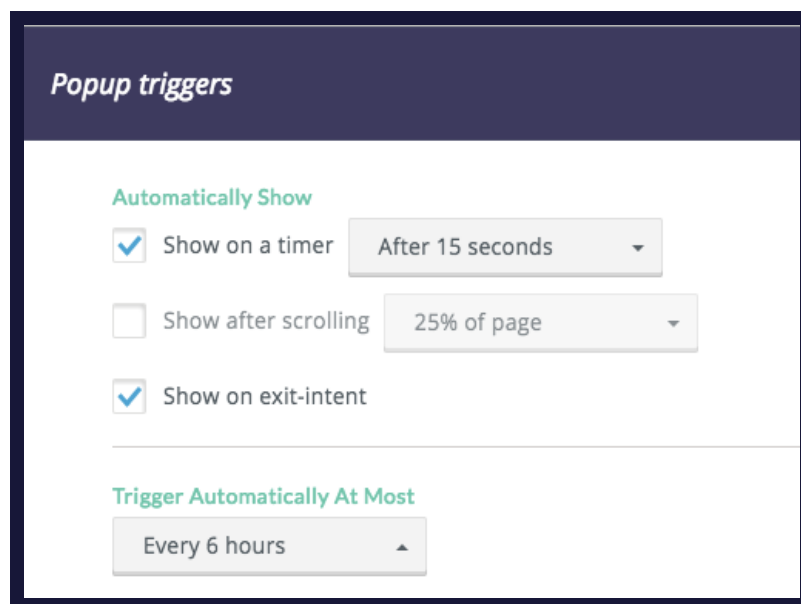
2. The When

An Overview of Display Triggers

No matter who you're targeting, one of the key factors in improving the effectiveness of your on-site displays is knowing when to trigger your messages.

As with any marketing initiative, it's important to put yourself in your visitor's shoes. If you were checking out your own site, when would you be most likely to respond to receive an opt-in invitation and not be turned off by the ask?

To be effective, you need to find the right balance of not being too passive but also not coming off like the aggressive car salesman who harasses you from the moment you enter the showroom until you run screaming out the door.



The screenshot shows a settings panel titled "Popup triggers". Under the heading "Automatically Show", there are three options: "Show on a timer" (checked), "Show after scrolling" (unchecked), and "Show on exit-intent" (checked). The "Show on a timer" option has a dropdown menu set to "After 15 seconds". The "Show after scrolling" option has a dropdown menu set to "25% of page". Below these options, under the heading "Trigger Automatically At Most", there is a dropdown menu set to "Every 6 hours".

There are four primary ways you can trigger a campaign to your desired audience:

Timer: This trigger determines when to display your campaign based on how long a visitor has been on your site. It could show immediately when a visitor lands, 10 seconds later, or longer.

Scroll Percentage: This shows your campaign once a visitor has scrolled down a certain percentage of your page.

Exit Intent: Exit intent tracks your visitor's mouse movement. If the visitor appears to be leaving or "exiting" your site, you can use that as a trigger for your campaign.

Tabs: Tabs, or other visual calls to action, can be customized to fit in with your site layout, and when clicked, trigger your campaign to display.



Common Display Trigger Uses

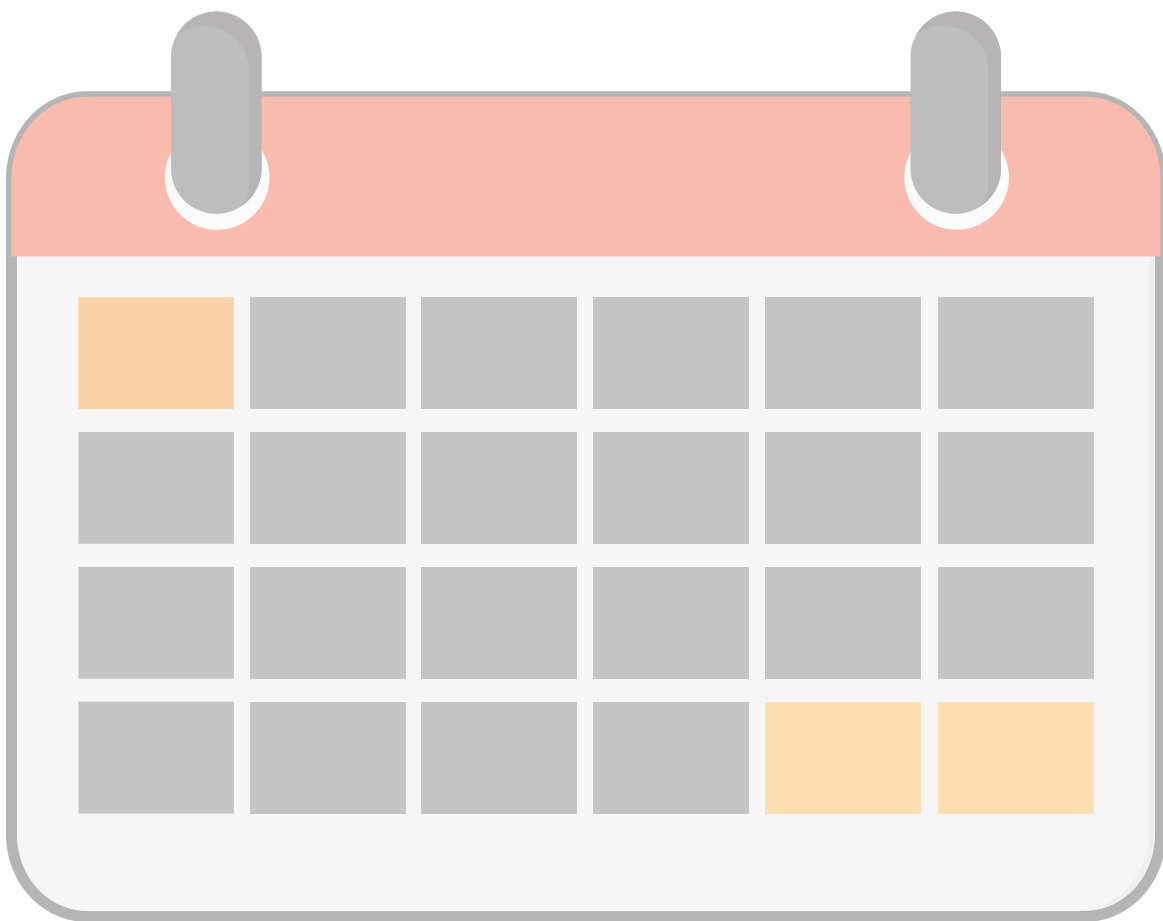
Type of Site	Trigger Type	Common Uses
Ecommerce store	Time	Let people surf your site to get an idea of what you sell before you ask them to sign up. Waiting 5-15 seconds lets people view your site to get an idea of what you sell before offering them a discount in exchange for their email address.
Ecommerce store	Exit Intent	When a visitor begins to leave your online store, offer a special discount that acknowledges that they won't be buying today and allows you to capture their email address and bring them back to your site in the future.
Publisher/Blogger	Scroll	Wait until a visitor starts reading your site and give them a chance to get through a majority of a post before displaying a popup that says something like using effective text such as, 'Like what you're reading? Sign up for more.'
Publisher/Blogger	Exit Intent	When a reader begins to leave your site, acknowledge that they are done reading and ask them to subscribe for more great articles delivered right to their inbox.
Non Profit	Time	Greet new visitors with a welcome video or message about the cause with a short time delay to let them get oriented.
Non Profit	Scroll	When a visitor scrolls down the page more than 50%, you can safely assume they are interested in your organization. Ask them to join the cause by signing up for your emails.
Non Profit	Exit Intent	When a visitor looks like they are leaving your site, offer them more information like recent accomplishments or detailed insights on your area of focus that they can download in exchange for their email address.
B2B	Time	If someone has been on your site for more than 30 seconds, they are likely interested in the products and services you provide. Use a pop up that invites them to a demo or webinar to capture their email address.
B2B	Scroll	When a reader scrolls down the page they are showing that they are interested in your area of expertise. Offer them a downloadable white paper or case study in exchange for their email address.

How Often Should I Show My Message?

One of the other decisions you need to make is how often to trigger your campaign. Every time someone qualifies? Every few days? Once a week?

Again, put yourself in the shoes of a frequent visitor to your site and think about at what point your messages go from helpful to annoying and use that as a guideline.

For example, you can show a free shipping bar or sign up bar every time someone comes to your site because it's less interruptive, but you wouldn't want to show the same pop up message on every visit. Instead, consider once or once a week.



3. The How

Building Audience Targeting Rules For Your Displays in Privy

In Privy, you can use one or more of targeting criteria with each of your campaigns in just a few clicks. First, let's examine how the targeting builder works.

To add targeting criteria to your campaign, first click "Add condition." Then, using the drop down menus and text boxes, you can precisely set the targeting rules.

Your first choice is to select from any of the criteria we discussed in the prior section. Next, you'll want to decide if you want to include or exclude people based on that criteria using the second drop down menu.

For example, if you're targeting people based on the URL of the page they're currently on, you'd choose from:

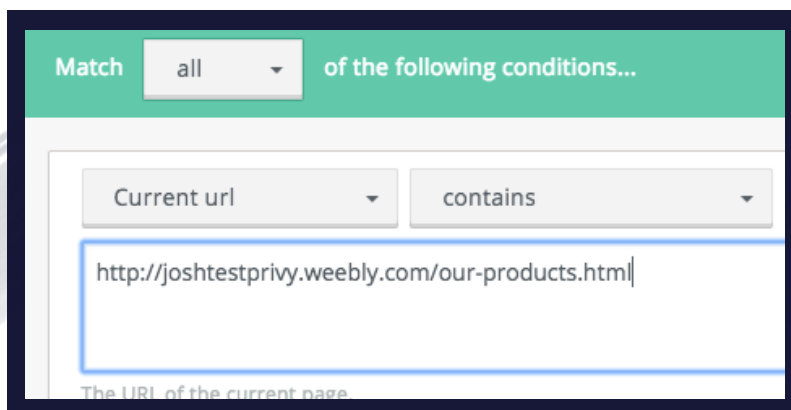
Equals: The exact URL you want to show your campaign on

Does not equal: Any exact URL you do not want to show your campaign on

Contains: Show the campaign on any page that includes a word or string

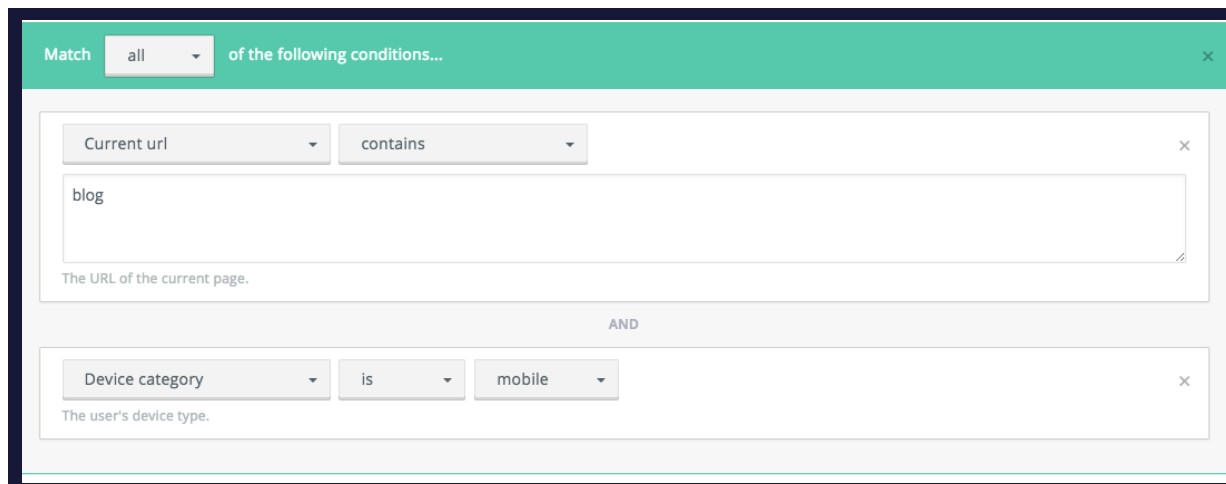
Does not contain: Do not show the campaign on any page that includes a word or string

Next, you can enter the page or pages that you want to include or exclude.

A screenshot of the Privy targeting builder interface. At the top, there is a green bar with the text "Match" followed by a dropdown menu set to "all" and the text "of the following conditions...". Below this, there is a white box containing two dropdown menus: "Current url" and "contains". Below these menus is a text input field containing the URL "http://joshtestprivy.weebly.com/our-products.html". At the bottom of the white box, there is a small text label that reads "The URL of the current page".

You can also combine targeting criteria in a single group by adding another condition. For example, if you wanted to show a specific sign up form to people who are reading your blog and on a mobile device you would say: current URL contains "blog". This captures every page where the URL includes the word blog.

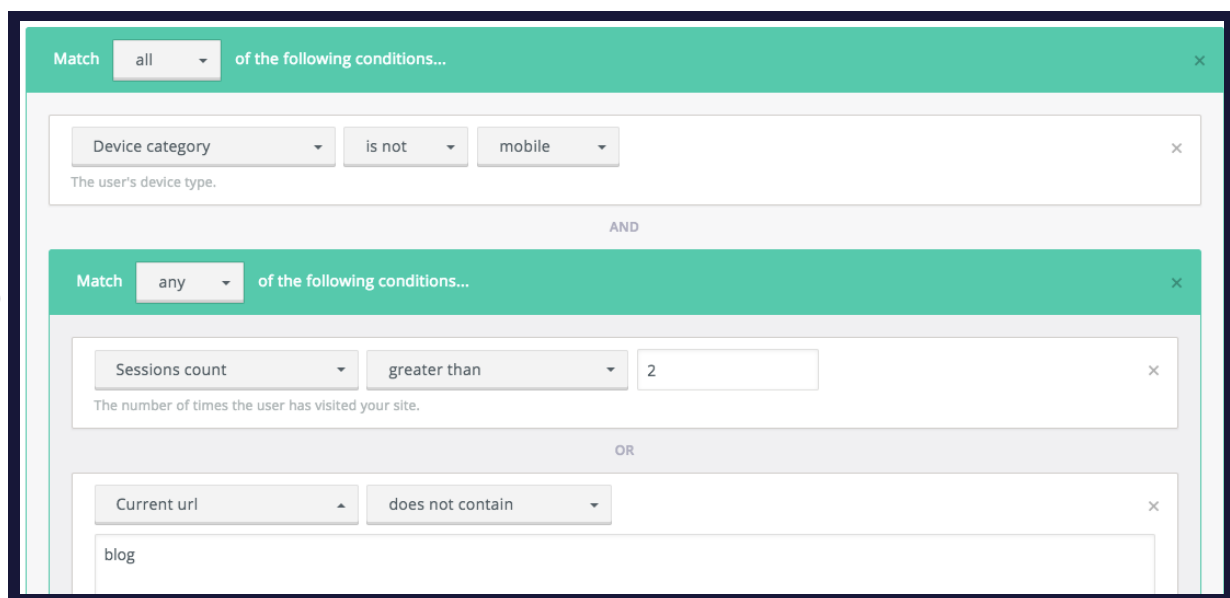
Then, you would set the device type as mobile.



The screenshot shows the Privy targeting configuration interface. At the top, it says "Match all of the following conditions...". Below this, there are two conditions stacked vertically, separated by an "AND" operator. The first condition is "Current url" with the operator "contains" and the value "blog". The second condition is "Device category" with the operator "is" and the value "mobile". Each condition has a small "x" icon to remove it.

For any group of criteria, you can also decide whether you want to show a display to people who meet any of the criteria or all of the criteria.

In the example below, you would show a specific offer to people who are not on a mobile device and have either been to your site more than twice or are currently reading your blog.



The screenshot shows a more complex targeting configuration. The top level is "Match all of the following conditions...". The first condition is "Device category" with the operator "is not" and the value "mobile". Below this, separated by an "AND" operator, is a nested group. This nested group starts with "Match any of the following conditions...". It contains two conditions: "Sessions count" with the operator "greater than" and the value "2", and "Current url" with the operator "does not contain" and the value "blog". Each condition has a small "x" icon to remove it.

Your Audience Targeting Options

In Privy, you have a wealth of audience targeting options for your displays that you can use to create a highly targeted message by utilizing one or more of the options below.

While you don't want to narrow your audience too much, you do want to make sure you're creating relevant messages for the key groups of people visiting your site.

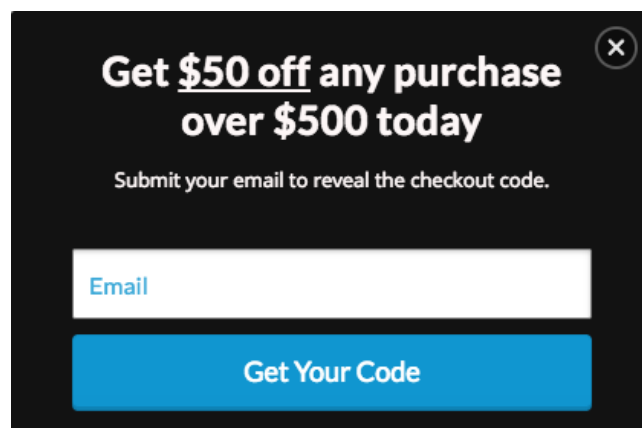
Targeting Type	What It Is	When to Use It
Device targeting	You can have separate campaigns, targeted to different devices. That way your designs and display triggers can differ for mobile phone traffic and website traffic.	Mobile sign up forms, mobile discounts, Instagram traffic
Current page targeting	Choose which pages of your site you want to show a display or exclude your display from.	Product specific discounts, blog sign ups, cart abandonment, home page exclusions
Initial URL targeting	Show a visitor a campaign based on which page on your site they first visited in this session.	Targeted offers, featured content
Source targeting	Display campaigns to visitors based on how they arrive at your site (such as a referral from google vs facebook).	Social welcome messages, ad-connected targeting
Traffic type targeting	Show a campaign based on the source type of the current user's session (like "search," "social", "paid", "direct" or sometimes "unknown").	Social welcome messages, targeted offers
Frequency targeting	Display campaigns to visitors based on the number of times a person has been on your site or how many pages they've viewed on your site in this session and over time.	Welcome back messages, blog sign ups, surveys, contact sales messages
Shopping cart value	Display messages to users based on the value of what is in their shopping cart (Shopify, Weebly, WooCommerce only).	Cart abandonment, free gift offers, high value discounts
Country targeting	Choose to show or not show visitors from certain countries your campaign.	Language specific displays, shipping restrictions, free gift offers
Privy Campaign Signed Up	Show a specific campaign to visitors based on whether they have seen or registered for a different Privy website campaign.	Welcome back messages, loyalty centric offers, reminder offers
Privy Campaign Seen	Trigger a display to visitors based on other campaigns they might have seen.	Featured products, special discounts, welcome back messages
Time of Day	Choose the hours within any day that you want to show your display to visitors.	Limited support hours, time-based sales and promotions
Day of Week	Choose the days of the week that you want your display shown to visitors.	Weekly specials, limited support hours, time-based sales and promotions
Language Targeting	Show a display based on the language setting in a person's browser.	Multilingual versions of any campaign. Feature products in specific languages.

4. Pulling It All Together

Example 1: How to Build a Cart Value Based Campaign

One of the most powerful examples of audience targeting is showing your specific offer based on the value of what is in a person's shopping cart in your online store.

Privy enables cart value targeting on a number of ecommerce platforms including Shopify, Shopify Plus, Magento2, WooCommerce, and Squarespace.



How To Do It



For Shopify stores, cart pages all include the word cart, and purchase confirmation pages all include the words “processing” or “thank_you”. In this case, you’ll want to target your message to build a cart saving campaign that reaches people with anything in their cart who attempt to leave your site.

First, set your targeting criteria so that the visitor must match ANY of the following conditions:

Current URL contains “cart” or “checkout”:

This will catch anyone who is on a cart or checkout page.

Cart Value is greater than \$0:

This will reach anyone who has added an item to their cart.

Match **any** of the following conditions...

Current url contains **cart checkout**
The URL of the current page.

OR

Cart value greater than **00.00**
The value of the customer's shopping cart.

Next, under triggers, be sure that the timer is OFF, scroll percentage is OFF, and exit intent is the only trigger enabled.

Popup triggers

Automatically Show

☐ Show on a timer After 30 seconds

☐ Show after scrolling 25% of page

☒ Show on exit-intent

Trigger Automatically At Most

Every day

Note: To show displays on the Shopify checkout page you'll need to install some extra code manually.

If you use another ecommerce platform, you can find keywords included in cart confirmation pages to follow similar targeting conditions that will help you save more carts with value-based offers.

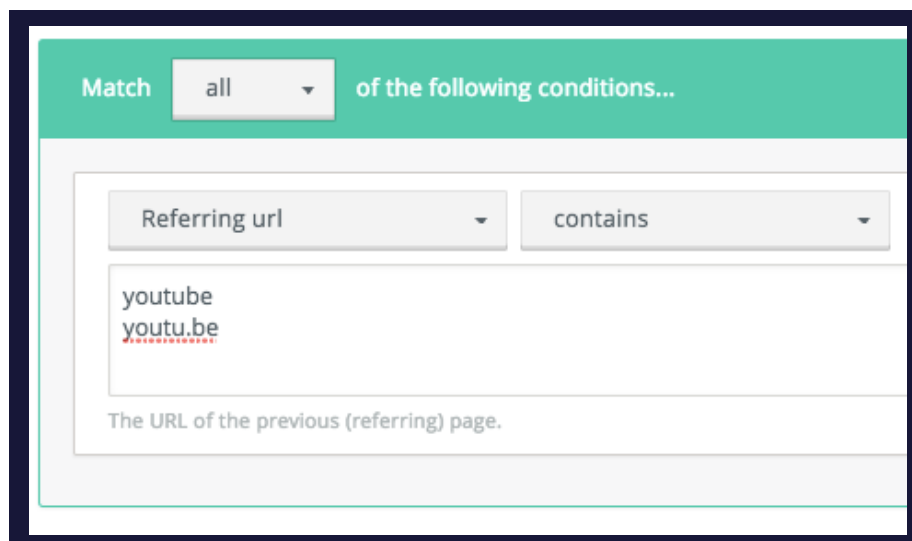
Example 2: Turning YouTube Fans into Subscribers

Using highly targeted pop ups makes it easy to welcome your YouTube fans to your store and increase the likelihood that they'll make a purchase.

Using audience targeting, you can make sure that your focused pop up is only seen by folks coming right from YouTube. That way in your YouTube videos and links, you can still send people to your home page instead of some complicated URL.

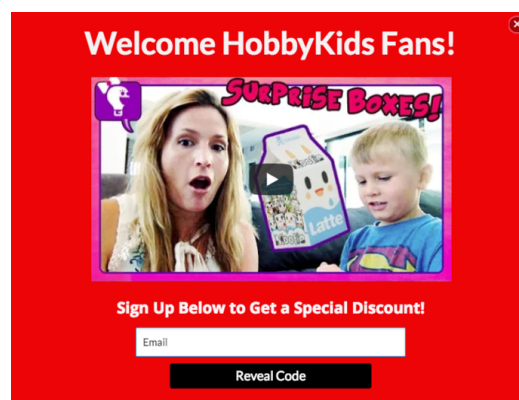
To do this in Privy, just go into the audience targeting section in the "Design" step of building your campaign.

Choose "referring URL contains" and type in YouTube and "youtu.be" (their link shortener.)

A screenshot of the Privy audience targeting configuration interface. At the top, it says "Match" followed by a dropdown menu set to "all" and the text "of the following conditions...". Below this, there is a section for "Referring url" with a dropdown menu set to "contains". Underneath, there is a text input field containing "youtube" and "youtu.be" on separate lines. A small red asterisk is next to "youtu.be". Below the input field, there is a small text label that says "The URL of the previous (referring) page."

Now that you've turned your fans to website visitors, you'll want to give them a reason to buy.

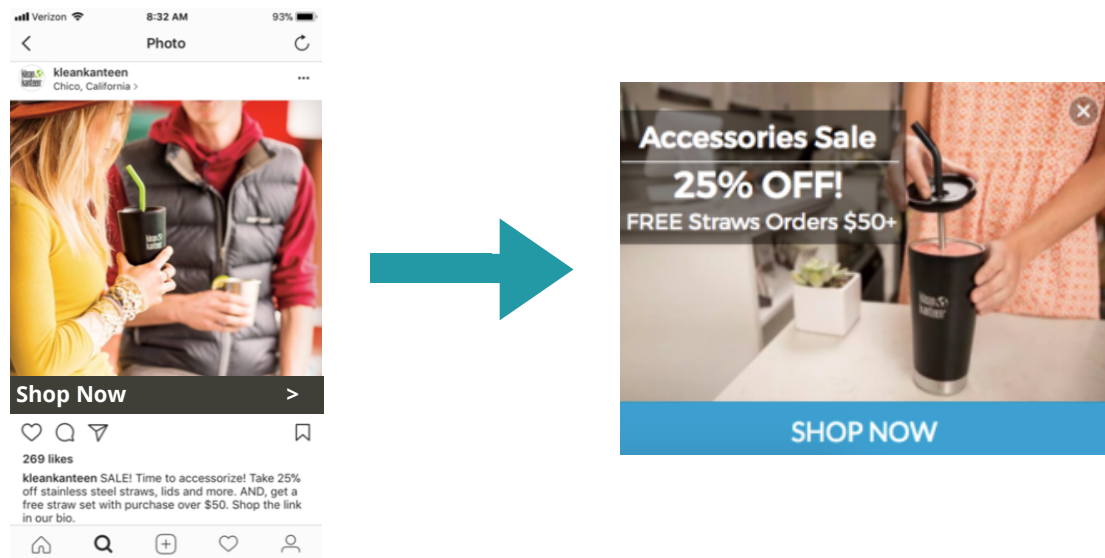
Creating a special video or special discount just for YouTube fans and including it in your sign up form gives people a reason to enter their information, which you can use in the future to promote new products, awesome videos, and special promotions.

A screenshot of a red Privy welcome pop-up for "HobbyKids Fans!". The header says "Welcome HobbyKids Fans!". Below the header is a video thumbnail showing a woman and a young boy looking at a "SURPRISE BOXES!" box. The video has a play button icon. Below the video, it says "Sign Up Below to Get a Special Discount!". There is an "Email" input field and a "Reveal Code" button.

Example 3: Targeting Based on UTM Codes

If you're spending money driving traffic to your website or online store with Facebook, Google, or Instagram ads, there is a good chance you have a very targeted message in your ads. You know exactly who you want to reach and where you want them to do when they reach your store.

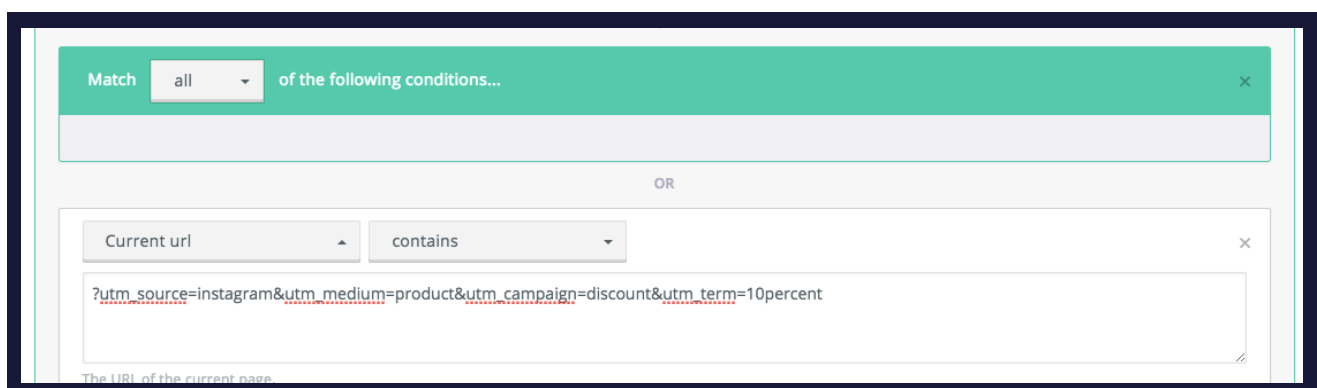
To get the most return on your ad spend, you should be matching your advertising messages with the messages that a visitor sees when they land on your site by targeting your displays based on the UTM Codes in your ads.



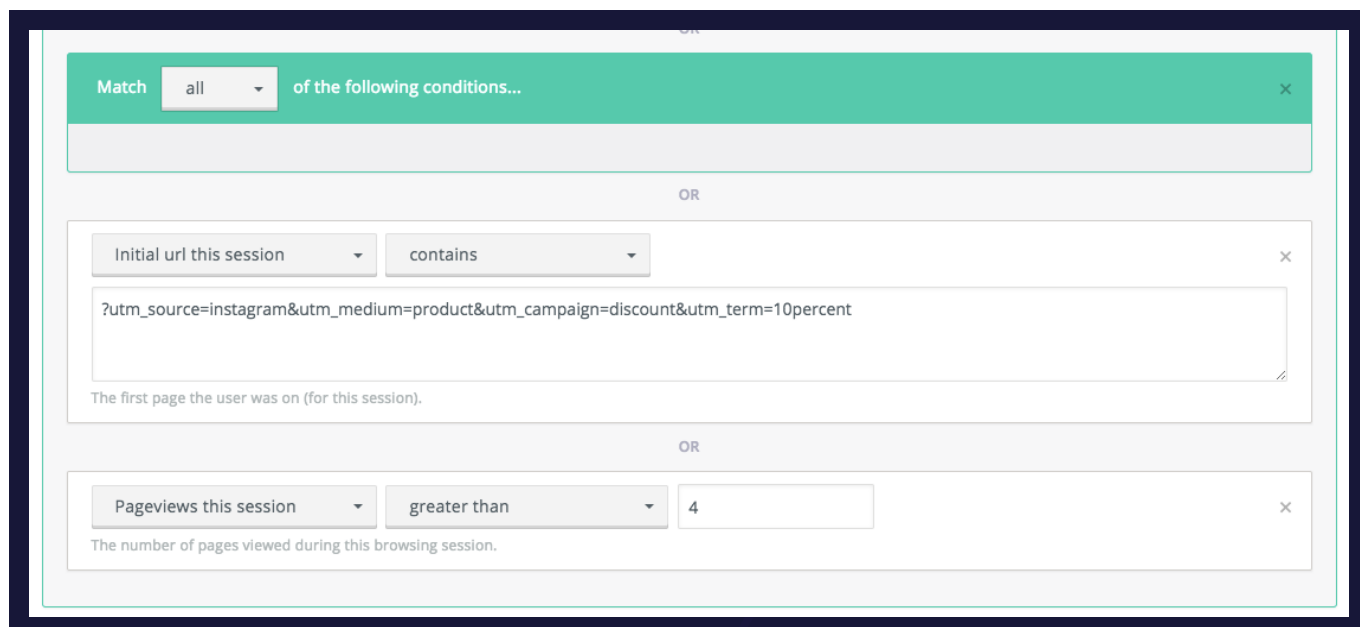
How to Do It

To target a campaign using UTM codes in Privy, you'll want to set either "Initial URL this session" or the "current URL" as the same as the full UTM code you have built.

Using an extended URL that includes your UTM codes is a great way to have those targeted messages launch upon someone's arrival to your store.



The second option lets you get a bit more complex. By using “Initial URL” targeting combined with the number of pageviews this session, you can let visitors move around your site before showing them your message that ties back to their original ad.



The screenshot shows a targeting rule configuration interface. At the top, a green bar contains the text "Match all of the following conditions..." with a close button (X). Below this, the interface is divided into two sections by "OR" labels. The first section contains a dropdown menu set to "Initial url this session", a dropdown menu set to "contains", and a text input field containing the URL "?utm_source=instagram&utm_medium=product&utm_campaign=discount&utm_term=10percent". Below the input field is a small text label: "The first page the user was on (for this session)". The second section contains a dropdown menu set to "Pageviews this session", a dropdown menu set to "greater than", and a text input field containing the number "4". Below the input field is a small text label: "The number of pages viewed during this browsing session.".

In Summary

Getting a welcome pop up is a great first step towards growing your email list and being able to drive people back to your ecommerce store, but it's just the beginning of what you can do with on-site messaging.

Using highly targeted displays lets you deliver the most relevant message to the right person at each stage of the customer journey.

Key Takeaways:

- In the digital world, we know a lot about our audience that we can use to provide timely, relevant messaging in our stores.
- Combining one or more audience targeting criteria enables you to have very targeted messages and discounts based on what we know.
- Three use cases to tackle right away are cart abandonment with cart value targeting, social media specific displays, and displays that tie to your paid advertising.

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Privy

