

What Customers Say vs What They Do

The signals retailers should actually trust

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BARKING CAT
COMMERCE ADVISORY



**Everyone stand up
please.**



300 of 400

store managers stayed standing when asked whether ecommerce was stealing their sales. Glasgow, Bolton, London, 2017.

The loudest customer signal in the building was an internal assumption.



FIVE KINDS OF SIGNAL

SAY

what they tell you

SEARCH

what they look for

DO

what they click and abandon

BUY

what they repeatedly pay for

SHOUT

what they tell everyone

None of these signals is the customer. The error is treating one as if it were.



WHAT CUSTOMERS TELL YOU
WHEN YOU ASK

SAY



S A Y

“Would you like the aisles to be less cluttered?”

Walmart, 2009. Customers said yes.

BUY

8

straight quarters of US like-for-like decline. The rollout was put on hold.

**Nobody says no to less clutter.
The survey asked the wrong
question.**



J O E

Joe: what is the most dangerous assumption you can make about a Jaques customer?

And what piece of behaviour supports or contradicts it?

WHAT CUSTOMERS DO WHEN
NOBODY IS ASKING

DO



BUY

84%

UK Clubcard penetration. Repeated behaviour at scale, which no survey can give you.

D O

1 in 5

IKEA customers swiped their Family card. Members spend twice as much.

DO

1 in 3

after IKEA nudged its co-workers, not its customers.

**The behaviour you can see is the
behaviour your operation lets
you see.**



J O E

Joe: what do your customers do that your dashboard cannot see?

You say brand loyalty starts at the fourth purchase. What does the dashboard see at one, two and three?

WHEN BEHAVIOUR LIES TOO

**The customer did not do that.
Your website did.**



D O

6 months

the best revenue idea in Bing's history sat in a backlog.

DO

+12%

revenue within hours. Over \$100m a year, US alone. Nobody asked a customer anything.

DO

About 1 in 3

well-designed experiments improve the metric being tested.

THE METRIC ON THE BOARD PACK

SHOUT



S A Y

NPS predicted sales growth. Only when it stopped asking recent buyers.

Seven US sportswear brands, five years.

FRIDAY, 10:17. ILLUSTRATIVE
FIGURES.

Sales down 18%. What do you do?

Conversion	down 11%
Traffic	flat
Site search	up 22%
Basket abandonment	up 14%
Delivery complaints	up 31%
NPS	down 3
Competitor	20% off today

**There is not enough information
here to act. That is the job.**



RESPOND NOW, OR WAIT?

- 1 What else says the same thing?**
- 2 Is it reversible?**
- 3 What does a week cost?**

THE SIGNAL TEST

WHO

is producing the signal

WHAT

are they actually doing

WHEN

in the journey, and how many

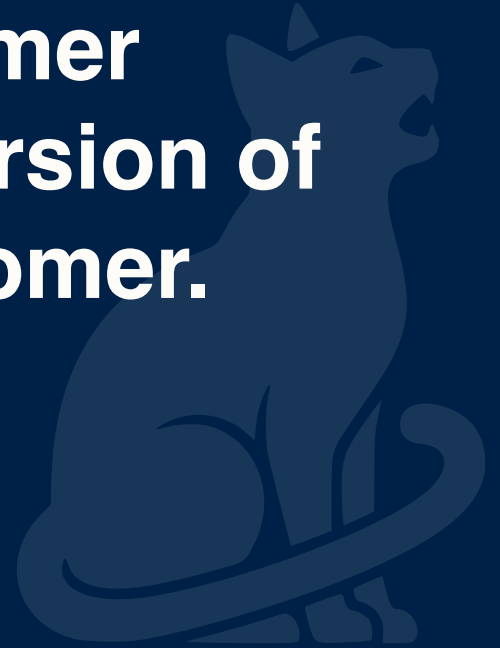
WHY

what else explains it

SO WHAT

changes because we now know this

Retailers do not lack customer data. They confuse their version of the customer with the customer.



Stay standing.



Fewer than 15

of 400 stayed standing at the end. Same people. Same question.
Different evidence.

J O E

Joe: brand story matters less than we tell ourselves.

After the last thirty minutes, is that a customer signal or a Jaques assumption?

Thank you.

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Diagnosis before solutions.

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SOURCES

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- Tesco: Q1 2025/26 trading statement (84% UK Clubcard penetration, June 2025); Tesco PLC Preliminary Results 2025/26, April 2026 (one-to-one personalisation; Your Clubcard Prices to 1.5m customers).
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- Bing: Kohavi and Thomke, The Surprising Power of Online Experiments, Harvard Business Review, September to October 2017. One-in-three rule: Kohavi, Online Experimentation at Microsoft.
- NPS: Baehre, O'Dwyer, O'Malley and Lee, Journal of the Academy of Marketing Science 50(1), 2022; Baehre, O'Dwyer, O'Malley and Story, Journal of Business Research 149, 2022 (193,220 responses).
- Harveys and Bensons store managers, 2017: first-hand. Trading-room figures: illustrative, not from any client or employer.