WHY UNDERSTANDING SHOPPER MINDSET IS CRITICAL TO SHOPPER MARKETING SUCCESS
Groundbreaking BrandSpark research, based on responses from over 80,000 North American consumers, reveals how attention and enjoyment provide deeper insight into what influences shopping behavior.

134 product categories mapped to four shopper behavior types:
The path to purchase for products is complex, but it all funnels into one critical factor: the shopper mindset – how they feel and what they are thinking.

The in-store shopper mindset differs depending on the level of engagement with each defined product category. The more a brand knows about the mindset of shoppers for their product category at the point of purchase, the better they can influence purchase behavior through targeted shopper marketing strategies pre-shop and in-store.

Groundbreaking research, based on the annual BrandSpark North American Shopper Study of over 80,000 shoppers in the U.S. and Canada, along with insights from BrandSpark’s new Shopper Army platform, shows for the first time where hundreds of grocery product categories reside in the shopper engagement landscape.

Central to the research was a rigorous analysis of the attitudes and feelings that survey respondents reported experiencing as they shopped for different types of products in-store. The conclusion was that two factors best explain how shoppers navigate different categories:

- **Attention** – to a product’s features and benefits when shopping for each product category.
- **Enjoyment** – derived from the process of shopping in the product category.

As illustrated in the table below, Attention and Enjoyment vary considerably by product category. This helps identify the mindset of shoppers, leading to a better understanding of what can potentially influence their behavior.

### Examples of Product Categories from the BrandSpark North American Shopper Study

<table>
<thead>
<tr>
<th>Product Categories</th>
<th>Enjoyment Score</th>
<th>Attention Score</th>
<th>Engagement Classification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children’s Medication</td>
<td>22%</td>
<td>81%</td>
<td>Duty</td>
</tr>
<tr>
<td>Toilet Bowl Cleaner</td>
<td>19%</td>
<td>42%</td>
<td>Auto-pilot</td>
</tr>
<tr>
<td>Facial Moisturizer</td>
<td>48%</td>
<td>79%</td>
<td>Engaged</td>
</tr>
<tr>
<td>Chocolate Snack</td>
<td>58%</td>
<td>40%</td>
<td>Sensorial-Driven</td>
</tr>
</tbody>
</table>
FOUR SHOPPER MINDSETS

Mapping the relationship between these two dimensions of Attention and Enjoyment, gives unique insights into the level of engagement for each product category.

In this category engagement landscape, products fall into four quadrants the help explain a shopper’s mindset:

- **Autopilot** – low attention, low enjoyment – shoppers want to get in, purchase, and get out.
- **Duty** – high attention, low enjoyment – trust is critical to shopper choice.
- **Sensory-driven** – low attention, high enjoyment – shoppers are driven by cravings.
- **Engaged** – high attention, high enjoyment – shoppers want to explore options.

This paper will examine the characteristics and implications of each of these quadrants in detail.
Do you know where your product sits on the Shopper Engagement Map? Read on.

THE EVER-CHANGING IN-STORE MINDSET

The shopper mindset changes back and forth between Autopilot, Duty, Sensory-driven and Engaged as the shopper moves around the grocery store, ticking off items on the shopping list, and gradually filling the shopping cart.

- **Area to area** e.g. fruit and vegetables to meat and fish;
- **Aisle to aisle** e.g. refrigerated goods to frozen goods;
- **Shelf to shelf** e.g. breakfast cereals to snacks;
- **Product category to product category** e.g. multivitamins to cold remedies.

So in each of these ever-smaller grocery store microenvironments the same shopper will feel and behave differently; and respond to different types of stimuli.

WHAT IT MEANS FOR SHOPPER MARKETING

Understanding where your product sits on the shopper engagement landscape, allows a brand to draw conclusions about:

1) **The shopper mindset:**

- How they shop for this product category?
- At which retailers do they prefer to make the purchase?
- Is price a major factor?
- How do they feel at the shelf?
- How does the location of the product in the store impact awareness and purchase?
- Do they notice and respond to in-store promotions?
- Do they read packaging?
- Do they recall TV advertising?
- Do they research products/read reviews online, while in-store?
- What is the likelihood of trying a new product?

2) **Strategies for shopper engagement:**

- Where in the store, is the best location for the product?
- What sort of pre-shop promotion will work best for this product?
- What sort of in-store promotion will work best for this product?
- Where in the store is the best location for promotion?
- Will sales be improved by certifications, awards and endorsements?
- Does the product have good ratings and reviews?
- Does packaging communicate the right message: does it need to grab attention or educate shoppers?
VERIFYING YOUR CONCLUSIONS WITH SHOPPER MINDSET RESEARCH

These conclusions about shopper mindset should be verified and the effectiveness of marketing strategies should be tested by shopper mindset research. BrandSpark has designed a methodology that combines in-store and post-shop techniques to gain deeper insights to fuel shopper marketing strategies:

1. **In-the-Moment Shopper Research**

In-store research enables brands to learn about what is happening during a shopping experience and pinpoint what aspects of the environment are impacting a shopper’s mindset. Due to the challenges of memory decay in post-shop research, BrandSpark has developed a platform that measures a shopper’s in-store experience while it is occurring. There is a significant amount of memory decay after the shop.

In-the-Moment Shopper Research can test, for example: awareness, location of product, look of shelf, feelings at shelf, awareness/reaction to packaging or promotion.

2. **Post-shop research (recall-based)**

Traditional post-shop research relies upon a shopper’s memory of the in-store shop and all of its important nuances. Because the details of a typical shop are often blurry upon reflection, BrandSpark has developed an approach – the Memory Elicitation Technique – that enables the shopper to capture important moments throughout a shopping trip by taking pictures, which are then fed into a post-shop survey.

The post-shop survey takes place at home. Prompted with images that reference their in-store experience, shoppers are better able to report on specific details that are commonly forgotten in traditional recall-based research.

BrandSpark’s Shopper Army platform can help with both types of research – the in-store and post-shop – but for shopper mindset research the in-store shopper mission is recommended. This is because the in-store context is particularly important and shopper mindset is an in-the-moment, often semi-conscious or autonomous state of mind.

**Previous research conducted by BrandSpark has revealed interesting actionable insights about the shopper mindset.**

Please see the end of the paper for details of the findings of these case studies.

**These findings include:**

1. How shoppers feel at shelf, when shopping for a pain relief brand. Confusion was the most common feeling.

2. How the location of the product – a soft drinks brand – in the store affects if the product was noticed and purchased. This demonstrates how the customer mindset changes throughout the store.

Why Understanding Shopper Mindset Is Critical To Shopper Marketing Success

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1. The ‘Autopilot’ Mindset

In every grocery shop there are a number of essential products that shoppers have to purchase periodically, but the process involves little deliberation or satisfaction. As shoppers enter this microenvironment of the store, they tend to switch to a semi-autonomous mindset, as they quickly grab what they need, and proceed to the next category or product on their list. Products in this quadrant include cooking spray, toilet cleaner, men’s deodorant/antiperspirant, adult toothbrush, ready-to-eat packaged meat and cottage cheese.

Mindset:
A shopper in the Autopilot mindset will tend to default to a regular brand, probably more out of familiarity and recognition than an overwhelming feeling of brand loyalty. When faced with too much choice on the shelf, the autopilot shopper is even more likely to resort to default purchases.

Autopilot purchases therefore tend to favor the category leaders.

Marketing strategies:
For challenger brands and new entrants, engagement strategies pre-shop and in-store need to be bold, blatant and persuasive.

The goal is to jolt the shopper out of autopilot with disruptive in-aisle tactics and just-can’t-refuse offers of free trials, discounts, bulk buys, print and online coupons.

AUTO PILOT Get in, get out!

Mindset dynamics
✓ Habitual purchases
✓ Brand loyalty a factor to contend with when stealing share.
✓ Too much variety is scary
✓ Shopper confusion resorts to default purchases

Strategies to engage:
✓ Education – why switch
✓ Disruptive in-aisle tactics
✓ Trial
✓ Engage with shopper pre-shop

Categories:
Batteries, Butter, Conditioner, Cooking Spray, Dish Soap, Fabric Softener, Facial Tissue, Gluten Free Products, Hand Sanitizer, Hand Soap, LED Light Bulb, Liquid Laundry, Detergent, Meat Alternative Snacks, Meat Snack, Men’s, Deodorant/Antiperspirant, Men’s Shampoo, Paper Towel, Pedicure Tool (ex. Foot Smoother, Heel Care), Shampoo, Sparkling Beverage, Sparkling Beverage System, Toilet Cleaner, Toilet Paper, Women’s Deodorant/Antiperspirant

2. The ‘Duty’ Mindset

There are some grocery purchases which shoppers take very seriously, and the attention level is high, but there doesn’t tend to be much satisfaction from the process. These are the duty purchases where the fundamental consideration is trust in the brand and a concern that making the wrong choice could have quite serious implications.

Products in this quadrant include children’s medication, prenatal supplements, multivitamins, topical analgesics, foot care, toothpaste and condoms.

Mindset:
Shoppers are looking for confidence in the product or brand and they trust that they are making the right choice in making their purchase. They will read labels closely. They will research the purchase both online and in-store, seeking advice from experts and peers; looking for certifications and awards; and reading endorsements, ratings and reviews.

They are more likely to pay more for a product from a trusted and established brand, than a cheaper generic / own-brand equivalent.

Marketing strategies:
It is imperative that the brand proves it deserves the trust of the purchaser. Packaging, website and marketing materials must communicate and evidence the benefits of the products.

The goal is to solicit and promote certifications and endorsements from respected organizations. Solicit and promote endorsements, ratings and reviews from professionals and shoppers.

DUTY Shoppers are looking for confidence and trust

Mindset dynamics
✓ Shoppers looking for trust cues
✓ Investigative shopping experience
✓ Extensive reading of labels
✓ Search products online to get feedback (using mobile if instore)
✓ Less price sensitive

Strategies to engage:
✓ Packaging that communicates benefits supported by features
✓ Certified product superiority claims
✓ Ensure strong ratings & reviews
✓ Endorsements from professionals and shoppers

Categories:
Cat Litter, Cleansing Aids (ex. Facial Wipes, Make-up brush cleaner), Electric Toothbrush (over $100), Facial Cleanser, Hair Color, Laundry Stain Remover, Mascara, Mouthwash, Sunscreen, Teeth Whitening, Vacuum (over $150), Vitamins & Supplements, Women’s Razor
3. The ‘Sensory-Driven’ Mindset

Sensory-driven purchases are fueled by cravings. The motivation is more about indulgence, even greed, than requirement.

Products in this quadrant include confectionary, savory snacks, cheese, ice cream, frozen treats and alcoholic beverages.

**Mindset:**

Shoppers are driven by impulse and cravings. The bright colors and tasty images attract them like a magnet.

Perhaps there’s some consideration that products are ‘naughty but nice’, but not sufficient to encourage reading the product ingredients or take note of any warnings on the packaging or online.

**Marketing strategies:**

To succeed here, products must be even more attractive than the competition, using brighter colors and mouth-watering packaging.

In-aisle tastings and just-too-good-to-be-missed promotions will help grab shoppers by the taste buds; justifications such as: ‘half the sugar, but just as tasty’, will give the guilty shopper the excuse they need.

**SENSORY-DRIVEN** Driven by cravings

<table>
<thead>
<tr>
<th>Mindset dynamics</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Driven-by the need to indulge or satisfy a craving</td>
</tr>
<tr>
<td>✓ Often impulsive</td>
</tr>
<tr>
<td>Strategies to engage:</td>
</tr>
<tr>
<td>✓ Breakthrough the clutter</td>
</tr>
<tr>
<td>✓ Mouth-watering packaging</td>
</tr>
</tbody>
</table>

**Categories:**


4. The ‘Engaged’ Mindset

The final quadrant is for products to which shoppers dedicate the most consideration and receive the most satisfaction from purchasing.

Products in this quadrant include cosmetics such as facial moisturizers, mascara, body cream, kid’s snacks, juices, and for pet lovers, dog food and treats.

**Mindset:**

Shoppers will often spend more time shopping for these products, exploring and comparing alternatives (including new products), both pre-shop, online, in-store, and via the product packaging, marketing materials and consulting retail sales staff.

**Marketing strategies:**

The engaged shopper is always considering the alternatives in this category. Thus it is essential for all brands, whether new entrants to the market, challenger brands or the category leader, to ensure that marketing not only keeps the product front of mind, but also educates and justifies why this product is the correct choice.

The product packaging, marketing materials and website must be informative and sales staff should be briefed on merits of products. Certifications, awards, endorsements, ratings and reviews will all help persuade the engaged shopper.

The engaged quadrant is a double-edged sword, as the right campaign that mixes awareness with education can win over new shoppers, but brands must fight to keep existing shoppers loyal, by reassuring them they have made the right choice.

**ENGAGED** Explore and see what is available

<table>
<thead>
<tr>
<th>Mindset dynamics</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Shoppers willing to spend time in aisle and ‘shop’ around</td>
</tr>
<tr>
<td>✓ Open to trying new products</td>
</tr>
<tr>
<td>✓ Less price sensitive</td>
</tr>
<tr>
<td>Strategies to engage:</td>
</tr>
<tr>
<td>✓ Descriptive packaging – can highlight features and benefits</td>
</tr>
<tr>
<td>✓ Superiority claims</td>
</tr>
<tr>
<td>✓ Credentials and consumer testimonial</td>
</tr>
</tbody>
</table>

**Categories:**

Anti-Aging Facial Care, Baby Lotion, Baby Shampoo/Wash, Bath Soaks, Body Lotion, Body Wash, Cat Food, Dog Food, Exfoliator (ex. Scrub, Cleanser, Micro-Peel), Face Make Up (over $20), Facial Mask, Hair Serum, Hair Treatment, Healthier Dessert, Juice, Kid’s Health Care, Lip Color, Men’s Electric Shaver, Men’s Face/Body Moisturizer, Organic Baby Food, Single-Dose Detergent, Soup
DOES THE SHOPPER MINDSET OF AMERICAN AND CANADIAN SHOPPERS DIFFER?

The BrandSpark research compared the engagement levels of US and Canadian shoppers for 18 product categories that were consistently measured in both the US and Canadian surveys.

For 16 of the 18 product categories the level of enjoyment and the attention paid by shoppers while in-store was similar.

For two product categories, juice and pasta, the engagement levels were different. For both categories American shoppers derived a higher level of enjoyment from the shopping experience.

Even for categories that exhibit similarity between the mindset of American and Canadian shoppers it is still advised that marketers study the extent to which executions should be customized for the local market purchase drivers where necessary.

SHOPPER MINDSET RESEARCH CASE STUDIES

BrandSpark’s Shopper Army members have been sent on numerous in-store missions to help brands gauge how shoppers shop for their products (or rivals products).

1. In-store Emotions Guide New Merchandising Plan and Packaging Design

On behalf of a pain relief brand, members of the Shopper Army (who were suffering from back pain) were recruited to shop for an appropriate pain-killing cream. As part of the study they were asked to describe how they felt when faced with a shelf full of products which might alleviate their pain.

The most common feeling was one of confusion, the second most common was one of hope.

Note: This type of research – into feeling at shelf – is pertinent for all product category types, but the results (and the feelings queried) would differ greatly... even for product categories in the same engagement quadrant (in this case, duty).

DISCOVER WHAT THE SHOPPERS STATE OF MIND IS AT THE SHELF

<table>
<thead>
<tr>
<th>SHOPPER EMOTIONAL STATE OF MIND</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONFUSION</td>
</tr>
<tr>
<td>POSITIVE EMOTIONAL MINDSETS</td>
</tr>
<tr>
<td>NEGATIVE EMOTIONAL MINDSETS</td>
</tr>
</tbody>
</table>

Why Understanding Shopper Mindset Is Critical To Shopper Marketing Success
2. Measuring Conversion of Multiple Merchandising Locations

On behalf of a beverage brand, members of the Shopper Army were recruited to shop for soft drinks. The bottles were on display at various locations throughout the store: beside checkout, front of store, ready-to-eat food aisle, middle of store and back of store.

The study found that the rate at which shoppers would notice, stop and pick up the product, varied greatly by the location in the store.

As noted in the category landscape research, above, the shopper’s mindset changes as they move around the store from microenvironment to microenvironment.

*Note: While product (and promotional) location research is important for all products, the results for different categories will vary significantly.*

<table>
<thead>
<tr>
<th>Conversion Funnel By Merchandising Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>WALK PAST</td>
</tr>
<tr>
<td>Beside the checkout</td>
</tr>
<tr>
<td>Front of the store</td>
</tr>
<tr>
<td>Ready-to-eat Food</td>
</tr>
<tr>
<td>Back of Store</td>
</tr>
<tr>
<td>Middle of Store</td>
</tr>
</tbody>
</table>

3. Identifying the Shopper Mindset by Retailer

On behalf of a dairy brand, members of the Shopper Army were recruited to shop for yogurt at their favorite grocery store.

The study found that the rate at which shoppers would notice, and purchase the product, varied greatly by retailer. The differences in conversion rates combined with knowledge of the merchandising executions enabled the brand to approach its retail customers with customized solutions to improve sales.

*Note: the conversion rates will differ by product categories and retailers.*

<table>
<thead>
<tr>
<th>Conversion Funnel By Banner</th>
</tr>
</thead>
<tbody>
<tr>
<td>DID YOU SEE THE PRODUCT?</td>
</tr>
<tr>
<td>Retailer A</td>
</tr>
<tr>
<td>Retailer B</td>
</tr>
<tr>
<td>Retailer C</td>
</tr>
<tr>
<td>Retailer D</td>
</tr>
<tr>
<td>Retailer D Promotion period</td>
</tr>
<tr>
<td>Retailer E</td>
</tr>
</tbody>
</table>

* *Note small sample size, N=51* *illustrative*
ABOUT THE AUTHORS

JAY SHELDON,
VP DEVELOPMENT & OPERATIONS,
SHOPPER ARMY

Jay brings a strong analytic background to the insights process, leveraging the latest techniques to find the best solutions to client problems. His work at Shopper Army is focused on developing a platform that allows brands to generate the insights and content they need to win with shoppers.

MARK BALTAZAR,
VP & PARTNER, BRANDSPARK INTERNATIONAL & SHOPPER ARMY

Mark has over 15 years of experience collaborating with Canadian and global brands in the areas of product innovation and shopper insights. Mark leads these practices at BrandSpark International and continues to enhance the Company’s capabilities to better service its clients. Mark is a sought-after speaker at conferences and by global clients, with whom he shares the latest insights into how shoppers navigate the path to purchase and what brands can do to better engage with them.

About BrandSpark:

BrandSpark International’s shopper-focused platforms are leaders in research and marketing amplification designed to drive sales. We specialize in uncovering shopper insights and providing marketing credentials that resonate with shoppers and boost product performance throughout their lifecycle. We support CPG and retail brands with shopper and innovation insights, product testing, shopper-voted credentials, and digital content generation (including e-commerce ratings and reviews). Our platforms include BrandSpark Shopper Insights, Shopper Army, the Best New Product Awards and BrandSpark Most Trusted brand awards.

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