

PRIVATE LABEL

BRANDED

V
S



HOW TO AVOID A
KNOCKOUT BLOW

SHOPPER
UNPACKED



**Shopper
Intelligence**
Understand. Influence. Lead.

Martin Baptie

**Shopper & Category
Development Director**

25+ Years FMCG Experience

78 Category Wins (12 K.O.)

20 Category Losses (2 K.O.)



Mike Ralls

Sales & Marketing Director

15 Years FMCG Experience



KANTAR CONSULTING

Chris Adkins

Managing Director

20+ Years FMCG Experience

52 Category Wins (3 K.O.)

8 Category Losses



MARS



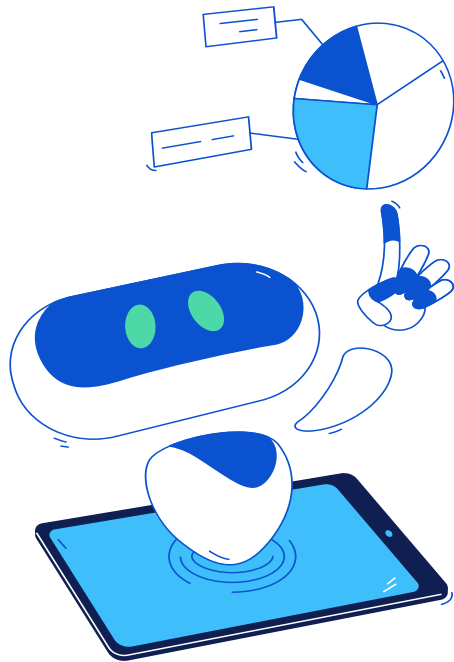
INTRODUCING:

THE CATEGORY TREND ANALYSER

New from Shopper Intelligence



What's The Category Trend Analyser?



An innovative tool that analyzes the prevalence of key consumer goods trends and topics in social media and industry publications

How it Works:

- % of mentions in web based public material
- Visualizes the top 10 trends

Dominant Trends in Key Categories – Q1 2024



TOP TRENDS	#1 CATEGORY	#2 CATEGORY	#3 CATEGORY
Sustainability (11.9%)	Household 37.36%	Frozen Food 27.32%	Dairy 23.64%
Craftsmanship (9.3%)	Beer wine and spirits 31.23%	Bakery/bread 17.16%	Fresh meat and fish 12.00%
Bold flavors (8.8%)	Soft drinks 31.48%	Snacking/Impulse 26.78%	Bakery/bread 14.94%
Transparency (6.3%)	Fresh meat and fish 23.01%	Produce 19.79%	Beer wine and spirits 17.26%
Wellness tonics (5.9%)	Chilled/Deli 42.79%	Frozen Food 24.80%	Petcare 10.62%
Global flavors (5.5%)	Dairy 26.43%	Dry Grocery 16.18%	Fresh meat and fish 11.22%
Convenience crossover (5.2%)	Dry Grocery 37.27%	Fresh meat and fish 31.75%	Frozen Food 14.44%
Upgraded classics (4.9%)	Beer wine and spirits 15.85%	Snacking/Impulse 13.05%	Health and Beauty 1.03%
Premiumization (4.58%)	Petcare 12.86%	Health and Beauty 12.35%	Chilled/Deli 8.41%
Locally sourced (3.85%)	Produce 35.83%	Bakery/bread 16.25%	Fresh meat and fish 3.91%

Publications Vs Shoppers: Difference in Priorities



Trends with Greater Shopper Attention

Bold Flavors

Difference: **6.9%**



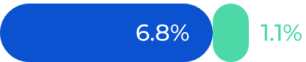
Craftsmanship

Difference: **6.1%**



Upgraded Classics

Difference: **5.7%**



Availability

Difference: **4.7%**



Sustainability

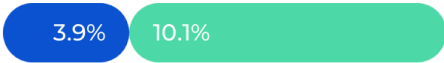
Difference: **3.8%**



Trends with Greater Industry Emphasis

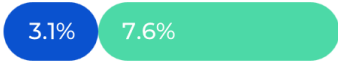
Wellness Tonics

Difference: **6.3%**



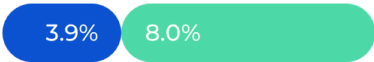
Premiumization

Difference: **4.5%**



Convenience Crossover

Difference: **4.1%**



Multifunctional

Difference: **3.6%**



Personalization

Difference: **3.2%**



Shoppers Publications

This is available FREE!...in 2024



CTA Tool | Shopper Intelligence

cta.shopperintelligence.com/trends?markets=All&audiences=All&quarters=Q1+2024&categories=All

New Chrome available

Category Trend Analyzer

About CTA Watch tutorial

Market

All

Audience

All

Quarter

Q1 2024

Category

All

Export to PDF

Sources

Rank	Top 10 topics	Presence	Change (v prior qtr.)
1	Sustainability	12.5% (n=14494)	No change
2	Convenience crossover	8.7% (n=10058)	No change
3	Craftsmanship	7.0% (n=8074)	No change
4	Global flavors	6.1% (n=7029)	↑ 1
5	Transparency	5.9% (n=6833)	↓ 1
6	Wellness tonics	5.9% (n=6813)	No change
7	Bold flavors	5.3% (n=6178)	No change
8	Premiumization	4.3% (n=4940)	No change
9	Locally sourced	4.0% (n=4591)	No change
10	Portability	3.0% (n=3409)	No change

Trend description

Close

Topics

Q1 2024

Topic	Percentage
Sustainability	12.55%
Convenience crossover	8.71%
Craftsmanship	6.99%
Global flavors	6.09%
Transparency	5.92%
Wellness tonics	5.90%
Bold flavors	5.35%
Premiumization	4.28%
Locally sourced	3.97%
Portability	2.95%

Sample size: 115,501



NEXT: The Main Event



- Round 1: define the shopper, are they different?
- Round 2: understand the role each plays for shoppers and the store
- Round 3: adapt strategy to maximise this for each

ROUND 1: Define the shopper

The Branded shopper is typically younger..

% of shoppers Under 40 years old

..aside from the obvious (Baby categories), **BBQ, Hot & Chilli Sauces** is the highest-ranking category for this at 72%!

50%

Branded shopper

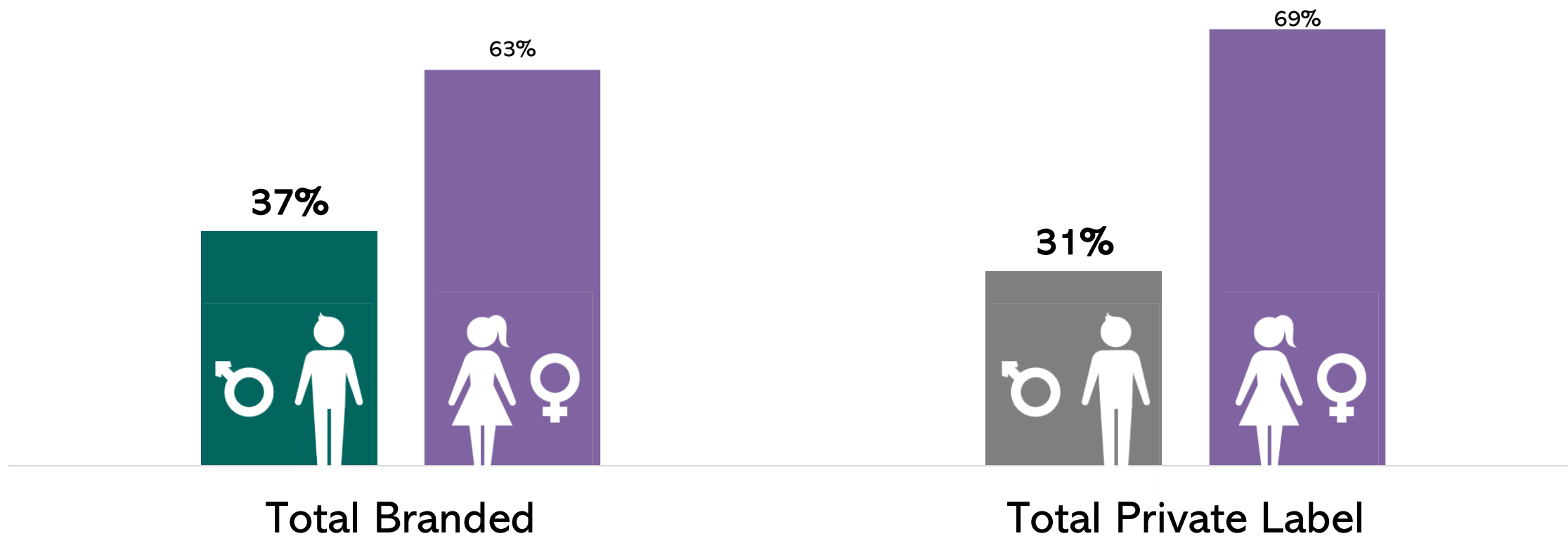
42%

Private Label shopper



..and they are also significantly more likely to be Male

% of shoppers by Gender



When it comes to cost-of-living strategies, Brand shoppers are more inclined to buy promos



38%

Branded shopper

% of shoppers 'bought on promo'

22%

Private Label shopper



Top 10 categories..?

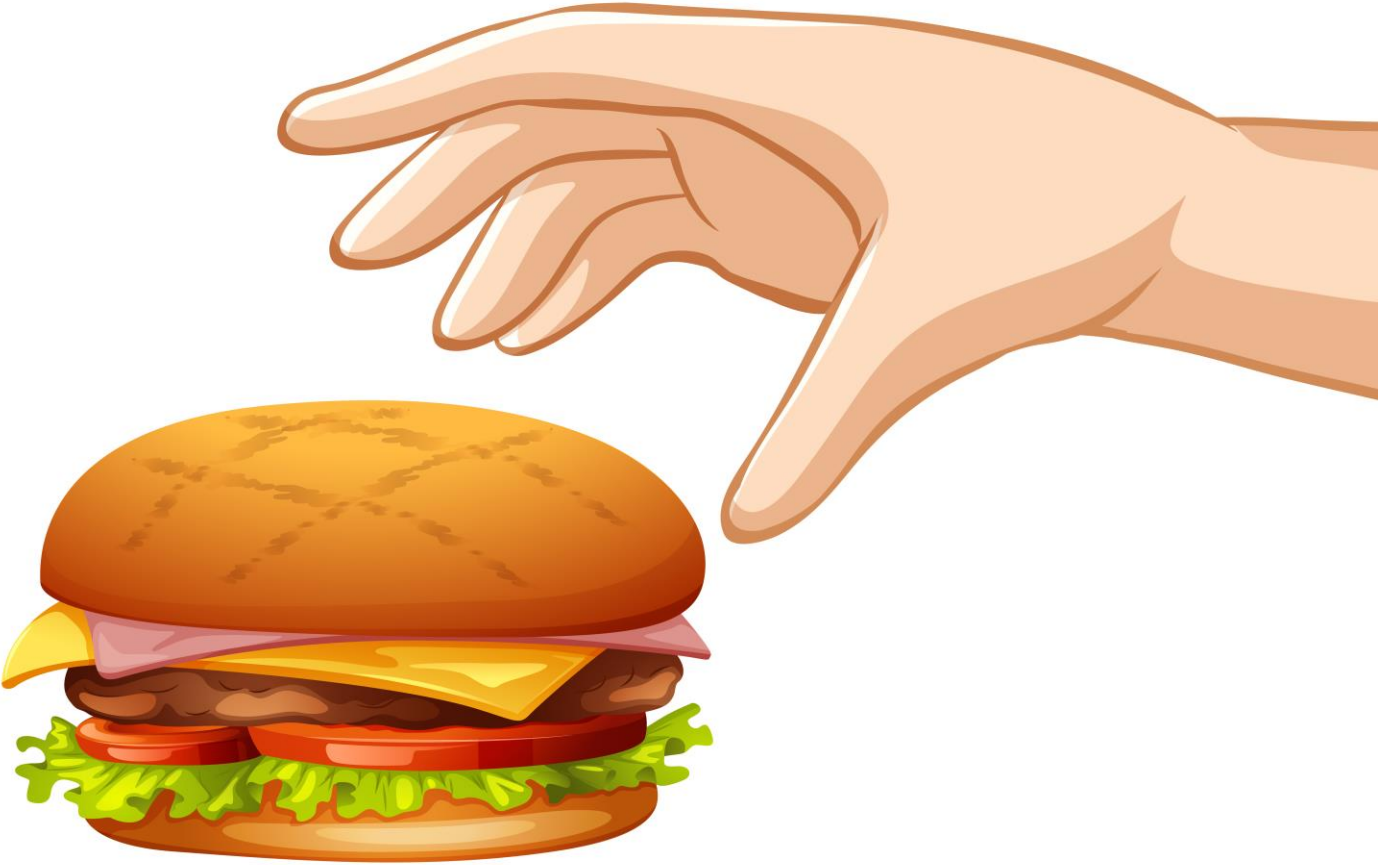
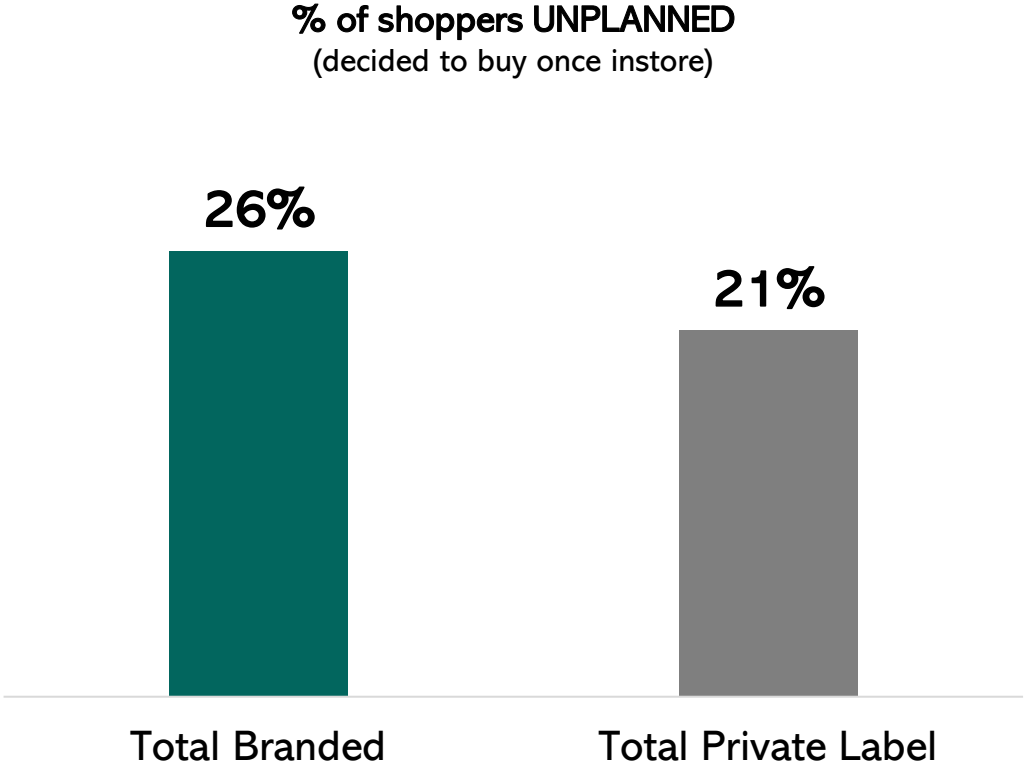


- 1) Boxed Chocolate and Twistwraps
- 2) Toiletries Gifting/Gift Packs
- 3) Plants and Gardening Tools
- 4) Spirits
- 5) Health and Wellbeing Drinks
- 6) Slimming/Weight Management
- 7) Stain Removers and Treatments
- 8) Fresh Lamb
- 9) Sparkling Wine
- 10) Toys

Branded shoppers typically plan less and as such are more likely to be influenced in store



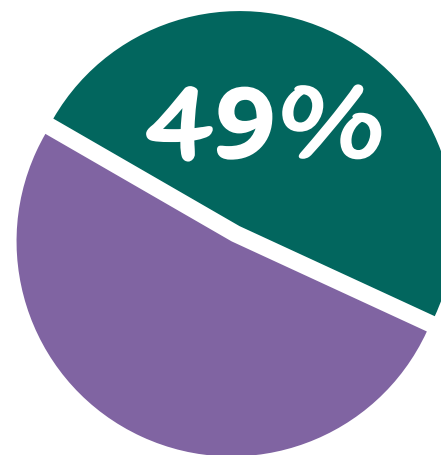
% of shoppers UNPLANNED
(decided to buy once instore)



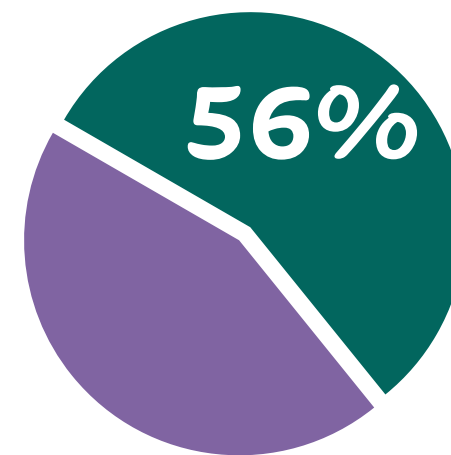
..but, they're also less loyal to one retailer



**"I do most of my shopping of this
kind at this Retailer"**
% shoppers



Branded shopper



Private Label shopper

..and more likely to walk away if they don't find their choice



% of shoppers 'walk away' if their choice is not available

46%

Branded shopper

43%

Private Label shopper



Biggest at-risk category –
Cosmetics (72% walk away)





ROUND 2: What is the role of Brand and PL

Pre-store intentionality, does Brand or Private label drive the trip?



Planned to buy (before the store)
% shoppers

74%

79%

Trip mindset – “Main reason I go shopping”
% agreement with statement

8%

Branded shopper

-3%

Private Label shopper

In-store engagement, a key part of the role brands play



Browse (spend time looking)
% shoppers

29%

Branded shopper

22%

Private Label shopper



Buy mindset – “Don’t mind paying more for better”
% agreement with statement

54%

Branded shopper

37%

Private Label shopper



This engagement transfers to other parts of the store, not just the main aisle

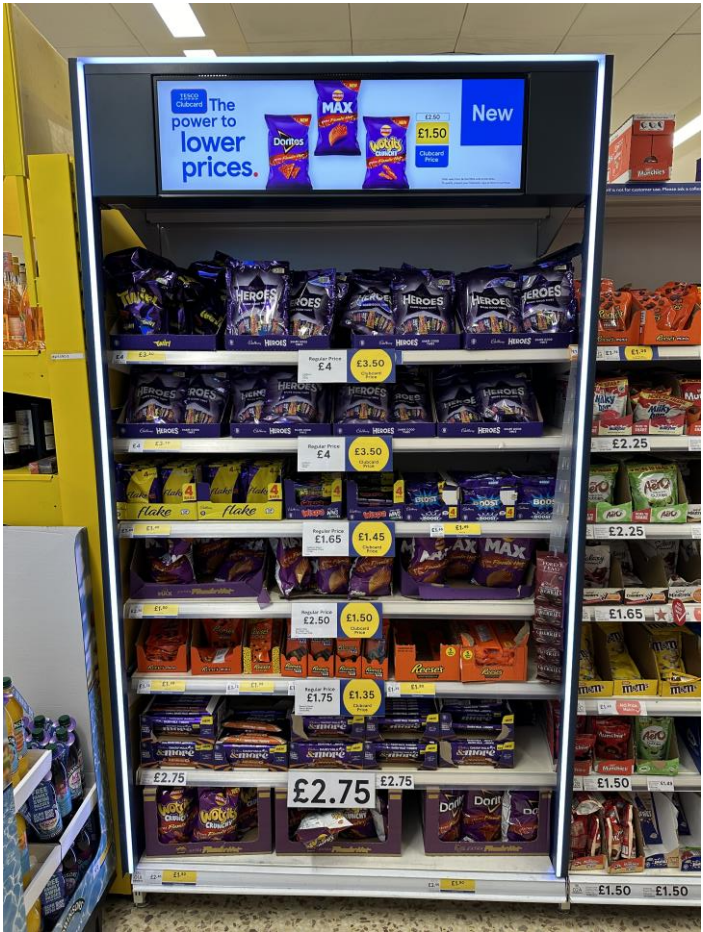


% of shoppers bought from secondary display

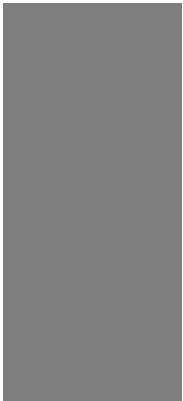
38%



Total Branded



26%



Total Private Label

..and it presents a much greater opportunity for 'new'



NEW

Buy mindset – “often buy more to try new and different”
% agreement with statement

51%

Branded shopper

42%

Private Label shopper

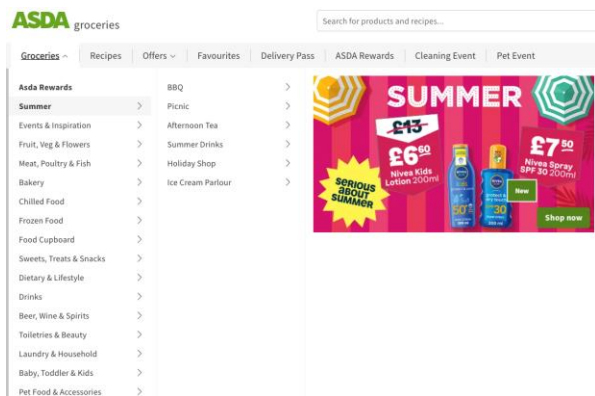
Branded shoppers are also more engaged with promotional mechanics before the trip



Leaflet



Advert



Internet info



Coupon

Branded shopper

9%

9%

5%

5%

Private Label shopper

6%

5%

3%

3%

This engagement and intentionality can all be translated to our category role model to define the position for Brand and PL



ENGAGEMENT

Offers opportunity to trade up and build retailer loyalty.

Willing to pay more
High retailer loyalty

LOW X HIGH

INTENTIONALITY

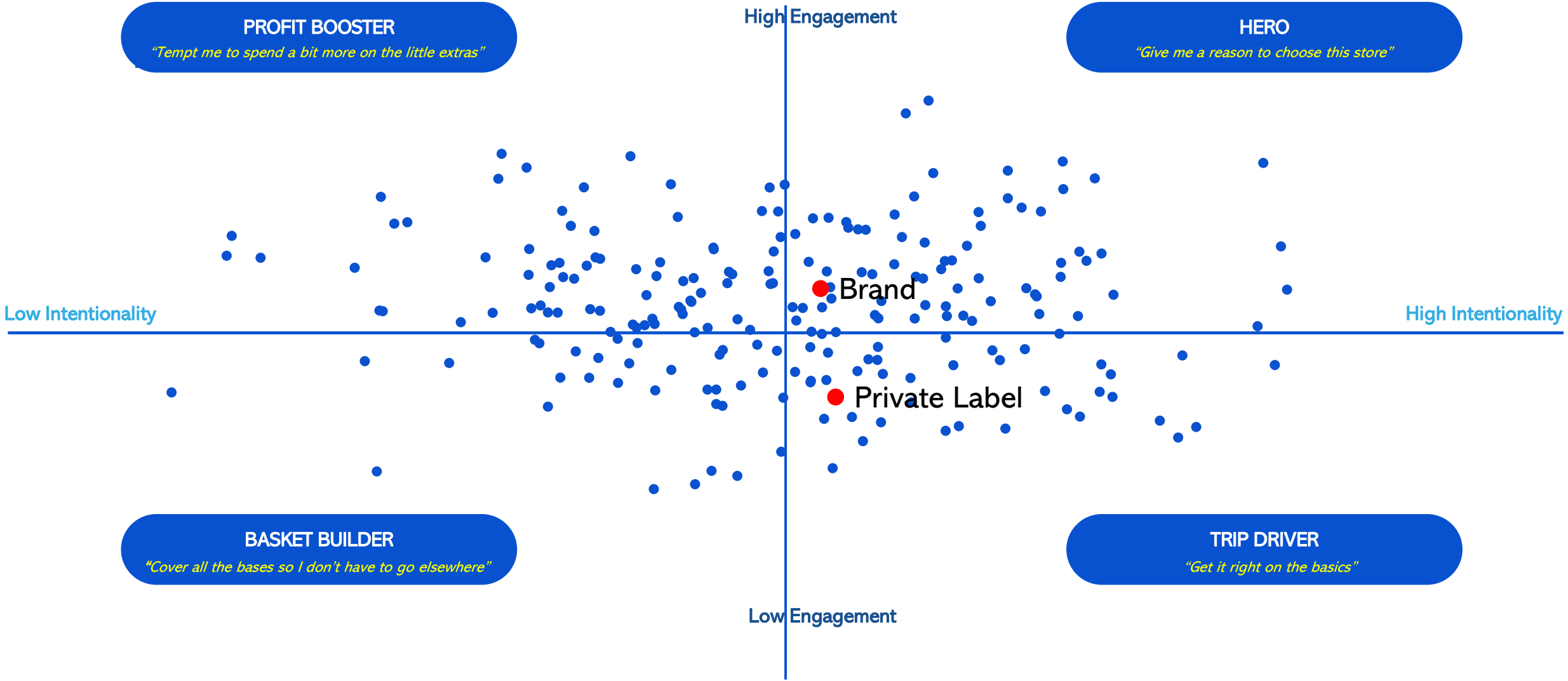
Drives shoppers to store and is highly planned.



Drives Traffic*
High Planned

*Traffic: "Main reason I go shopping"
and "Promotions encourage shopping"

PL drives the trip, but Brand can drive store choice and greater engagement





ROUND 3:

**Adapting the strategy to
maximise the strength
of each**

What we know..

Branded shopper



- Younger
- Male
- More impulsive
- Influenced by promos
- More engaged
- Willing to trade up
- Buy from display
- Looking for new

Private Label shopper



- Older
- Female
- Heavily planned
- Shop quickly
- More loyal

1

Build excitement

New products to tempt shoppers, use eye-catching displays to build on impulse opportunity, clear premium strategy in the right categories

2

Enhance retailer image

Optimise range to drive repeat visits (doing categories 'well'), use theatre to create differentiation

1 Traffic building

Ensure wide offer of products is available, optimise range to meet all shopper needs, talk to shoppers before the store to build on planned behaviour

2 Easy to shop

Create simplification to drive ease of shop and avoid shopper frustration, use merchandising to aid grab and go behaviour

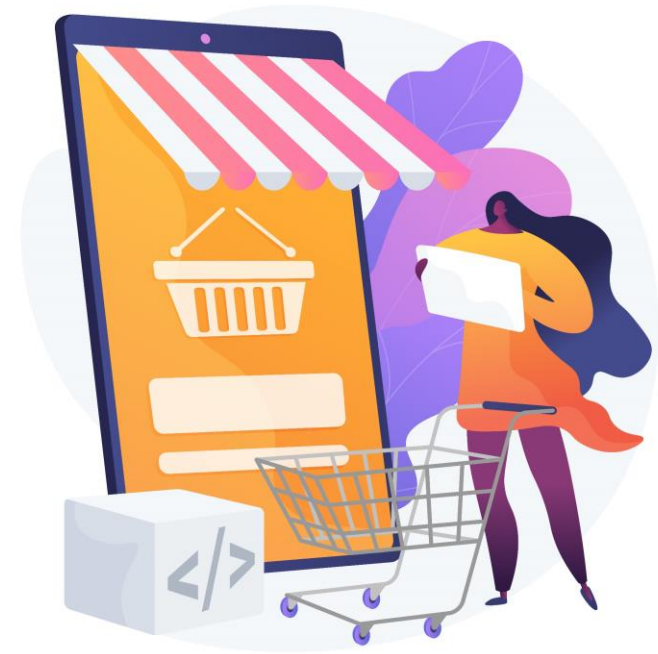
Questions?



Wrap up and next
time..

Next on Shopper Unpacked

- Shopper Comparison by Channel
- Supermarket, Discounters, Online, Convenience
- Brand new 2024 data
- Provisional date: Wednesday 11th September



The Category Trend Analyser – Link in Chat!



A screenshot of a web browser displaying the "Category Trend Analyzer" page on the Shopper Intelligence website. The browser's address bar shows the URL "shopperintelligence.com/category-trend-analyzer/". The page has a dark blue background. At the top, a navigation menu includes links for "About us", "Solution", "Suppliers", "Retailers", "Resources", "Blog", "In store", and "Category Trend Analyzer", which is circled in red. The main content area features the Shopper Intelligence logo, a large heading "Get the big-picture trends for your category strategy", and descriptive text about the tool. A video player with a play button is visible on the right. At the bottom, there is an email sign-up form and a "Discover the trends." button, with a note "Free in 2024" below it. A "Privacy - Terms" link is in the bottom right corner.

CTA Tool | Shopper Intelligence

Category Trend Analyzer | Shop

shopperintelligence.com/category-trend-analyzer/

New Chrome available

Shopper Intelligence

About us Solution Suppliers Retailers Resources Blog In store **Category Trend Analyzer**

Get the big-picture trends for your category strategy

Navigate the consumer goods landscape with the Category Trend Analyzer, a tool from Shopper Intelligence that highlights what's shaping shopper behavior across the market and store.

Easily identify and capitalize on trends that matter most to your category, brand, or store.

Your best email...

Discover the trends.

Free in 2024

Privacy - Terms

**RETAILER PROFILES**
Total Store
Grocery and Hard Discounters
Over 60,000 shoppers
Apr-Aug 2023 data set
**THROUGH THE SHOPPER'S EYES**
a look at how we shop the store, the behaviours that we most typically see and what you should do about them

 **Stuff you should know!** **HOW TO INFLUENCE THE GEN Z SHOPPER**
'Finna' tell you more than just the 'high key' facts!
 **Stuff you should know!** **TROUBLE AHEAD**
Navigating the Shopper Impact of Category Price Inflation

15th June 11 AM
HOT TOPICS **RESTRICTED ZONE**
Understanding the Impact and Opportunity from HFSS

18th May 11 AM
HOT TOPICS **WHAT CAN WE LEARN FROM EMERGING CATEGORIES?**
Using effective Category Management to unlock the opportunity
 **Stuff you should know!** **Price & Promotion - The Shopper perspective**
Category X

Martin Baptie
Shopper & Category Development Director
martin.baptie@shopperintelligence.com **Category A
Category B**
Decision Hierarchy Input
Martin Baptie
Shopper & Category Development Director
martin.baptie@shopperintelligence.com **SUSTAINABILITY: MEETING THE NEEDS OF YOUR SHOPPERS**
It's more than "blah, blah, blah..."

THE 'WHY' WEBINAR SERIES 

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HOW TO AVOID A
KNOCKOUT BLOW

SHOPPER
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Understand. Influence. Lead.