

# HOW TO BUILD A CATEGORY STRATEGY



**CATEGORY  
HACKS**  
LESS WORK,  
MORE WINS!



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

# On the agenda for 2025



1. How to **Manage the Price Discussion**
2. How to **Build a Category Strategy**

## NEXT: How to **Prepare for a Range Review**

4. How to **Maximise Promo Effectiveness**
5. How to **Get the Most out of Shopper Marketing**
6. How to **Get Your Product Listed**
7. How to **Balance Your Data & Insights Needs**
8. How to **Give Category a Voice with Leadership**
9. How to **Talk to Your Buyer**
10. How to **Conduct a Merchandising Review**



# Download previous webinar decks and content



<https://shopperintelligence.com/resources/uk>



# Our “Jedi Category Master” on Linked in, you will follow!



**Give Martin's first  
post a comment  
and a like!**



[linkedin.com/in/martinbaptie](https://linkedin.com/in/martinbaptie)

Our experts...



Chris Adkins



20+ Years FMCG Experience



Martin Baptie



25+ Years FMCG Experience





# How to build a category plan

# How to build a category plan



- Step 1 – Understand
- Step 2 – Identify
- Step 3 - Create



**Relationships are key!**





# Step 1: UNDERSTAND

# Any good strategy starts with a landscape review..

## MARKET



Market size



Long term trends

## SHOPPER



Current behaviour



Path to purchase

## CONSUMER



Usage & Attitudes



Macro trends



# The big challenge!



# There really is a lot of data out there, right?



Data/Insight Type	Providers	Main Deliverable	Source	What does it give you?	Benefits	Risks/Limitations
Scan / Epos	Nielsen IRI/Circana	Volume/Value by SKU Distribution, Rate of Sale	Sales Data	What has been sold and where?	Detailed SKU performance	Backward looking Expected (everyone has it - no unique view)
Panel	Kantar Worldpanel Nielsen Homescan North Star Illuminator	Penetration Trip spend Weight of Purchase Frequency	Sales Data Demographics	Who is buying what, where and how often? What are the purchase trends?	Identify buying behaviour trends	Limited 'panel' of shoppers Doesn't explain the 'why'
Loyalty	Dunnhumby Quantum Coop Hive Nectar 360	Volume / Value by Sku Trip Spend Weight of Purchase Frequency	Sales Data Demographics	Who is buying what by retailer? What are the purchase trends by retailer?	Detailed retailer understanding Broader purchase behaviour ('in my basket')	Specific to one retailer Not shareable
Top line/Market	IGD Shopper Vista Mintel Euromonitor Lumina	High level view on big topic items (e.g. Health, Cost of Living) Market overviews	Shoppers Consumer	Market level sentiment Macro trend understanding	Good for framing retailer discussions Top-to-top discussions	Limited level of detail
Large Scale Quant	Shopper Intelligence	Category/segment/brand level insight Ongoing coverage Tailormade content	Shoppers	In depth shopper and category understanding Critical contextual insight Depth to brand, segment, shopper type	Applicable to most day-to-day and strategic challenges Provides a retailer lens (in their language) Cost effective, high ROI Shareable across the market	New way of working needs to embed
Custom Quant	Multiple/Ad Hoc	Bespoke content Usually category or brand level	Shoppers Consumers	Customised coverage Broad potential scope	Deep knowledge of chosen focus area Designed to meet specific objective	Expensive and potentially 'one-off' Less scope for broader application
Custom Qual	Multiple/Ad Hoc	Deep dive on specific topic	Shoppers Consumers	Varied methodology to meet needs In depth understanding on specific topic	Very tailored to specific questions Good 'sound bites' to engage retailers	Limited scale could be misleading Category objectivity
Shopper Community Providers	Multiple	Bespoke content Usually category or brand level	Shoppers	Custom 'panel' to build relationship with Broad potential scope	Quick to get answers Tailored to specific needs	Limited re-use Category objectivity
Quick Response	Attest Vyper	Bespoke content Usually brand driven	Shoppers Consumers	Product/consumer understanding Customised coverage/content	Good for testing product development Speed of response	DIY approach required Large commitment (credits)
Free Stuff	Internet Others	High level view Typically shaped around 'hot topics' at the time of release	Shoppers Consumers	Broad knowledge	Good for framing presentations	Accuracy and source Not specific for needs



# Market – what questions do we ask?

Size of  
market

Growth or  
decline

Key  
segments

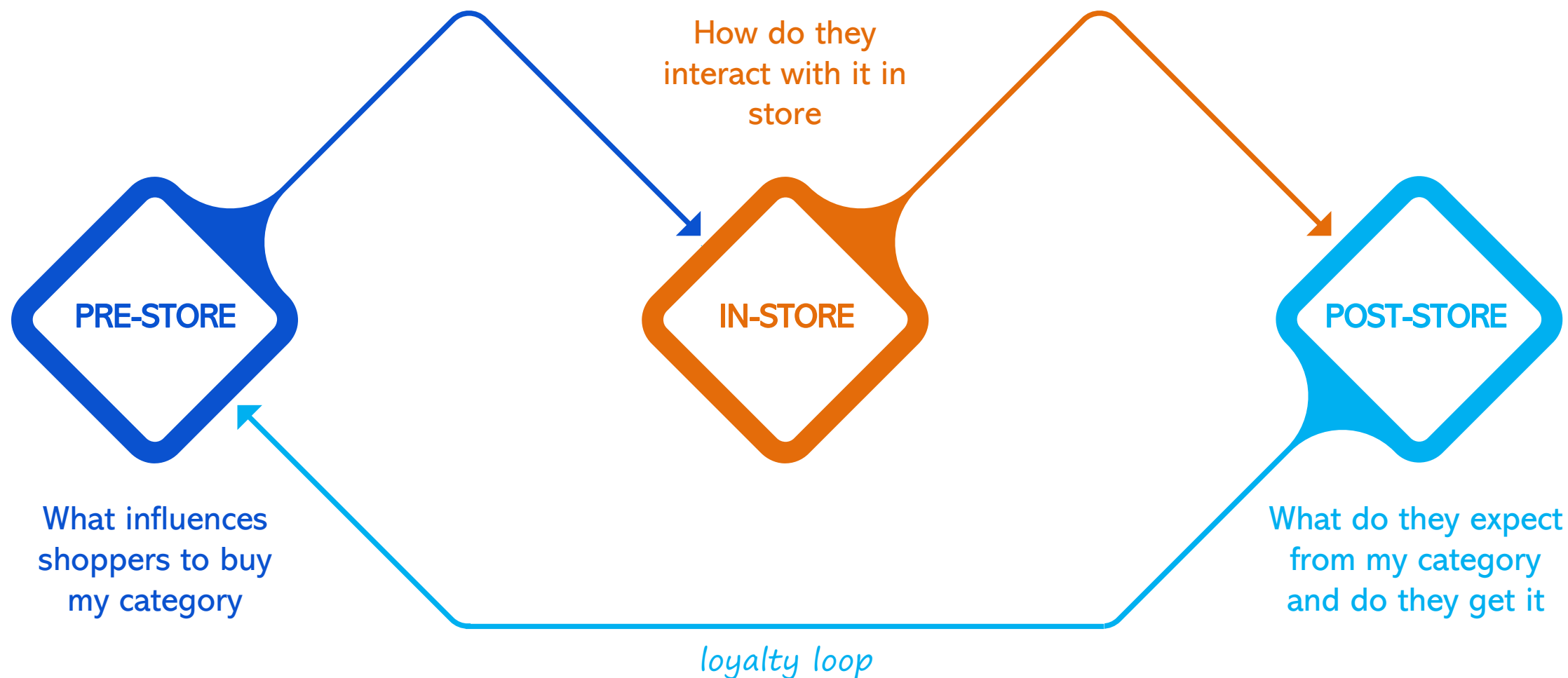
*Questions..*

Frequency &  
Penetration

Purchase  
trends

Channel  
dynamics

# Shopper – what questions do we ask?





# Consumer – what questions do we ask?



**Usage**

How is my category currently used by consumers



**Attitudes**

What are the typical attitudes to my category, e.g. a good healthy option



**Occasions**

What occasions do we currently serve



**Macro Trends**

What macro trends are also influencing my category, e.g. sustainability

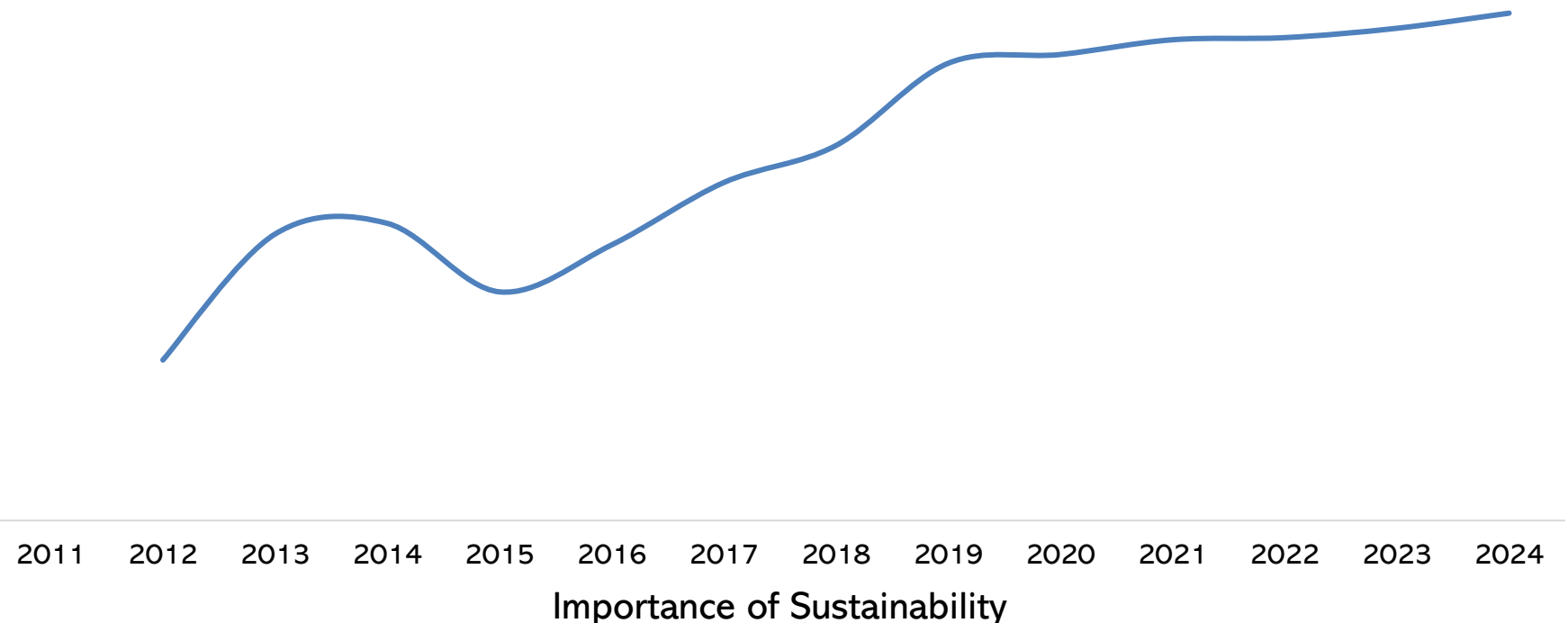
# Step 2: IDENTIFY

## Objective of this stage

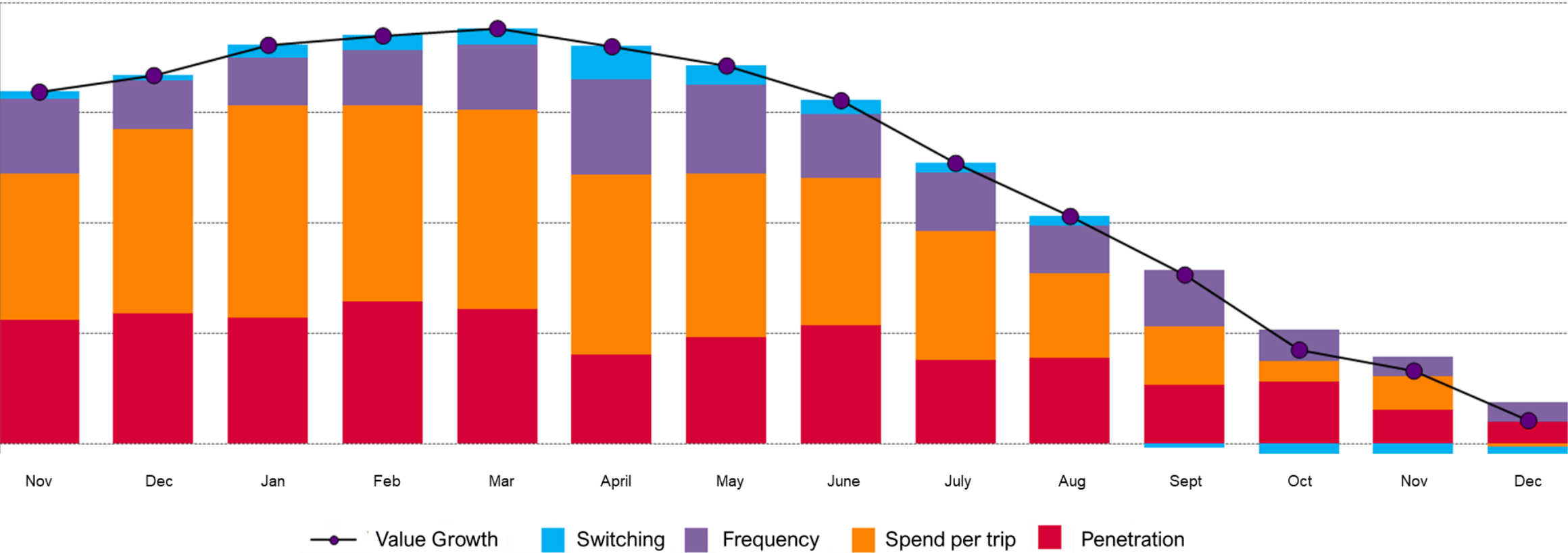




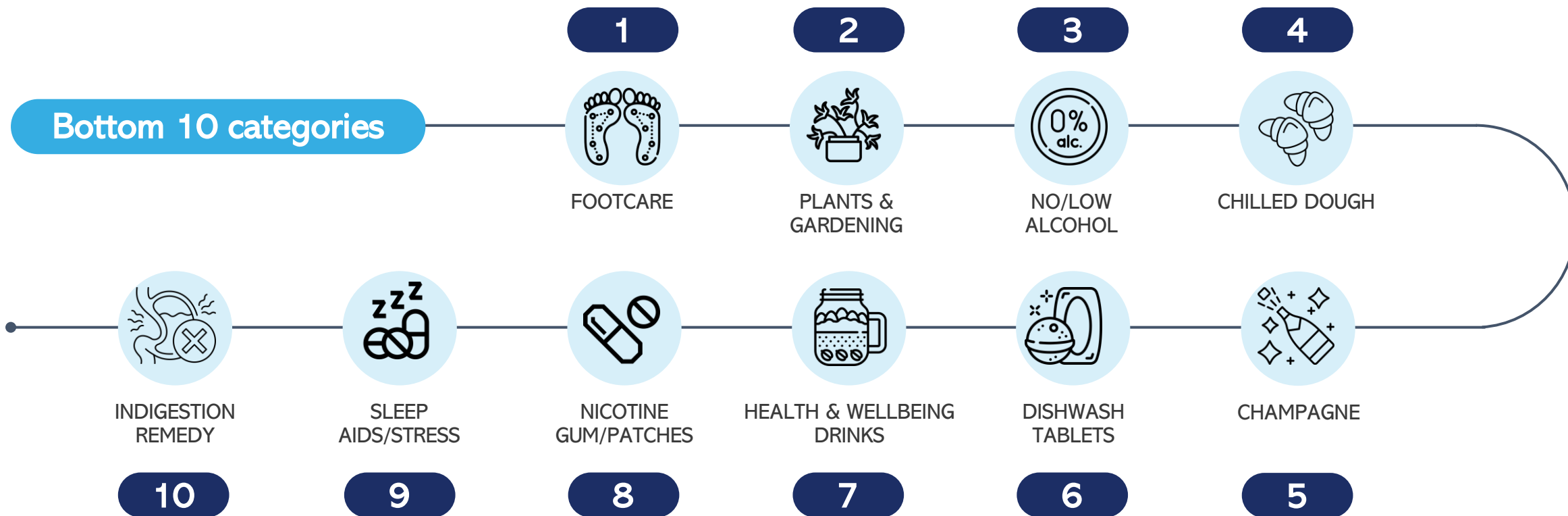
# Consumer challenge, e.g. increased focus on sustainability



# Category challenge, e.g. decline in sales performance

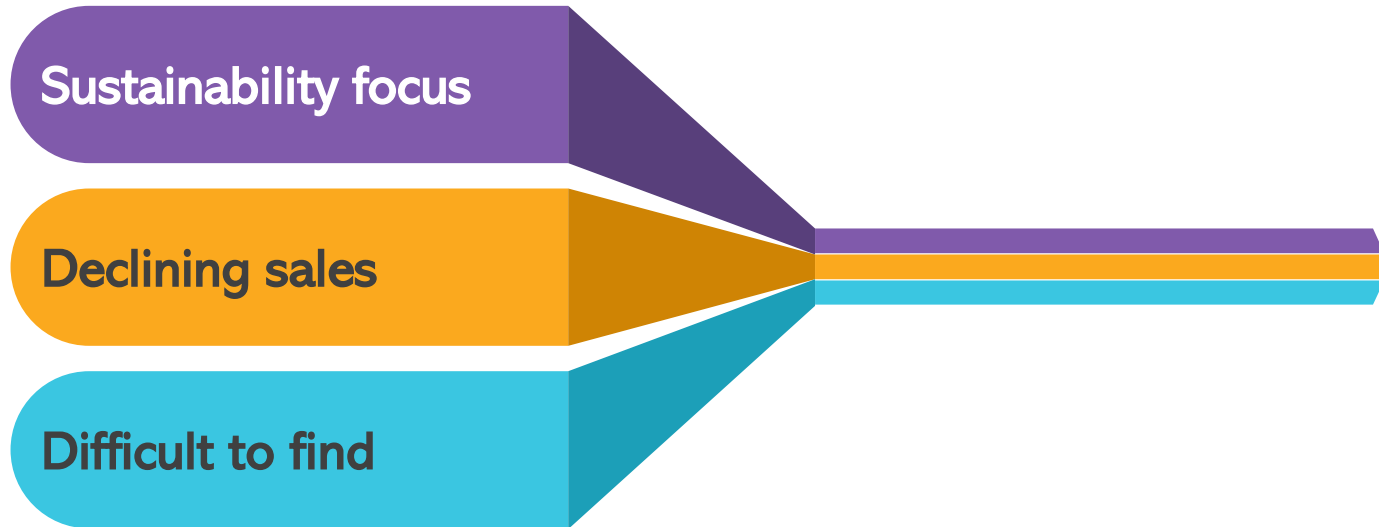


# Shopper challenge, e.g. difficult to find in store





# How can we drive growth from this point



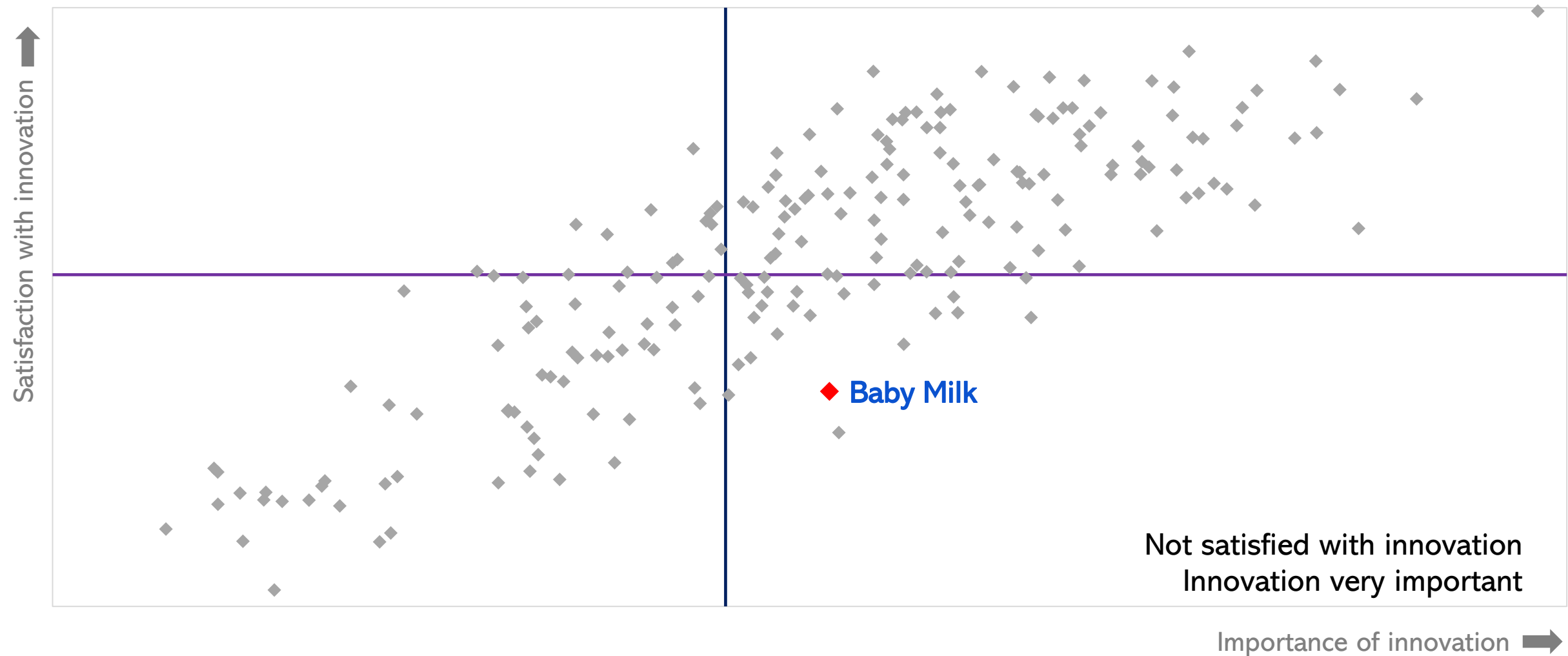
Possible growth levers

**Innovation**

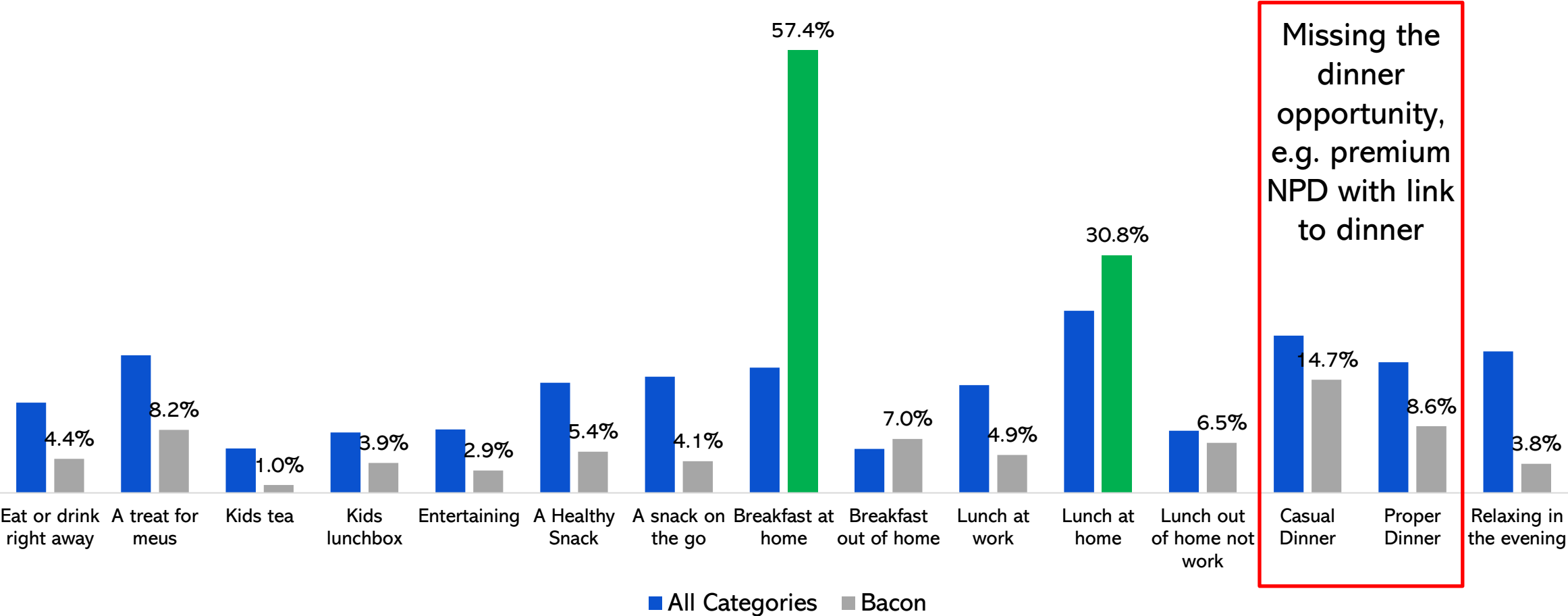
**New Occasions**

**Fixture optimisation**

# Innovation, e.g. Baby Milk



# Occasions, e.g. Bacon



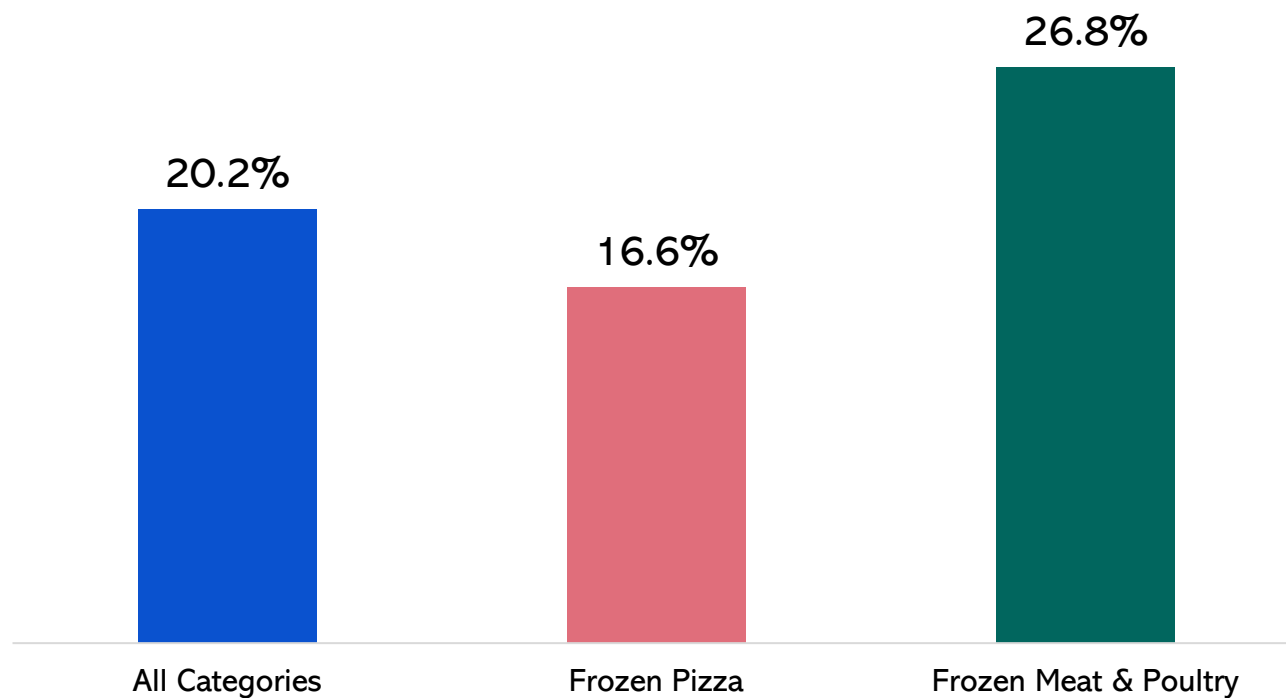
Missing the dinner opportunity, e.g. premium NPD with link to dinner



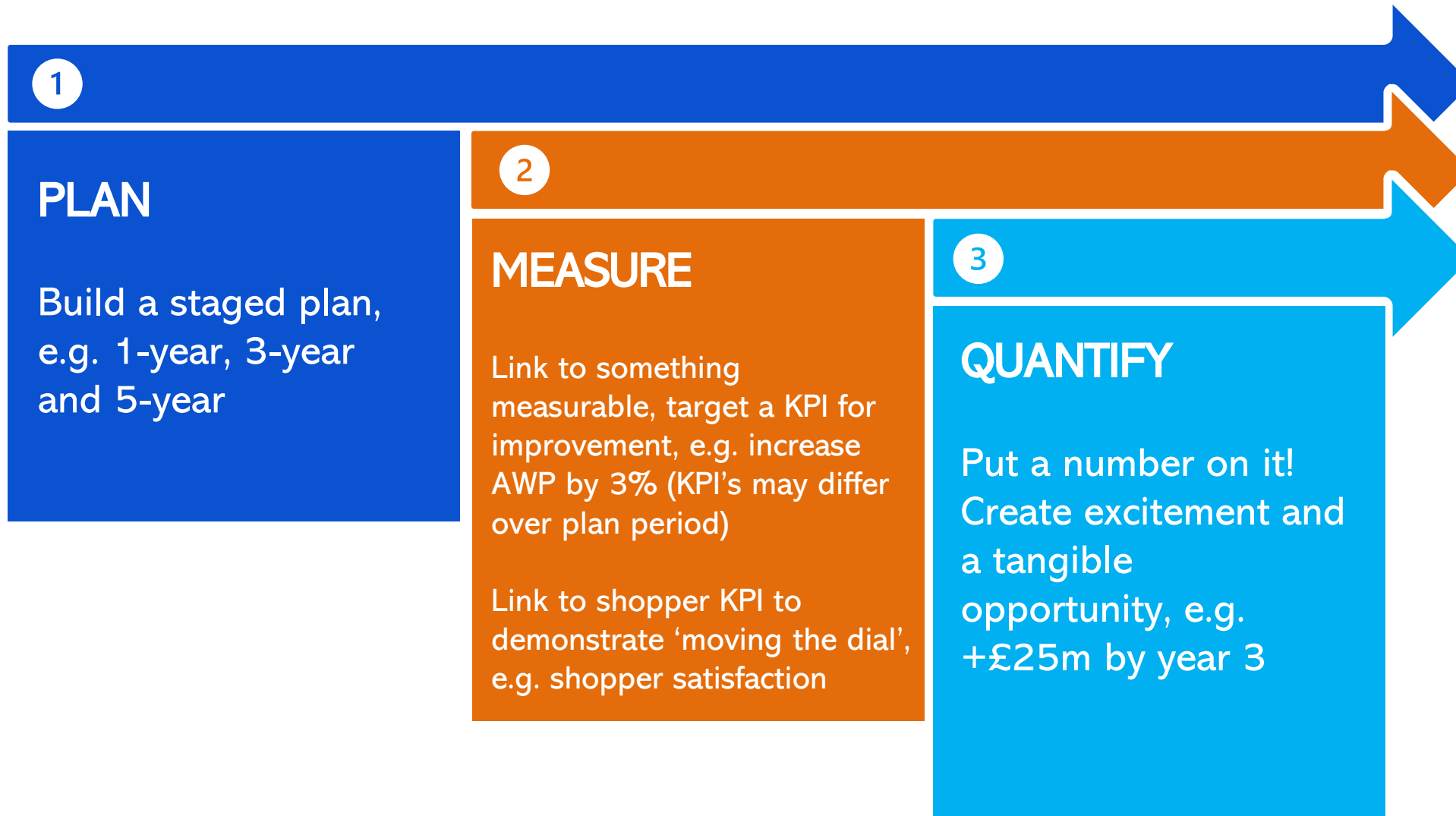
# Fixture optimisation, e.g. Signage and navigation



Improve the signage  
at the shelf



# Size of prize, things to remember..



# Step 3: CREATE



# Three things to consider

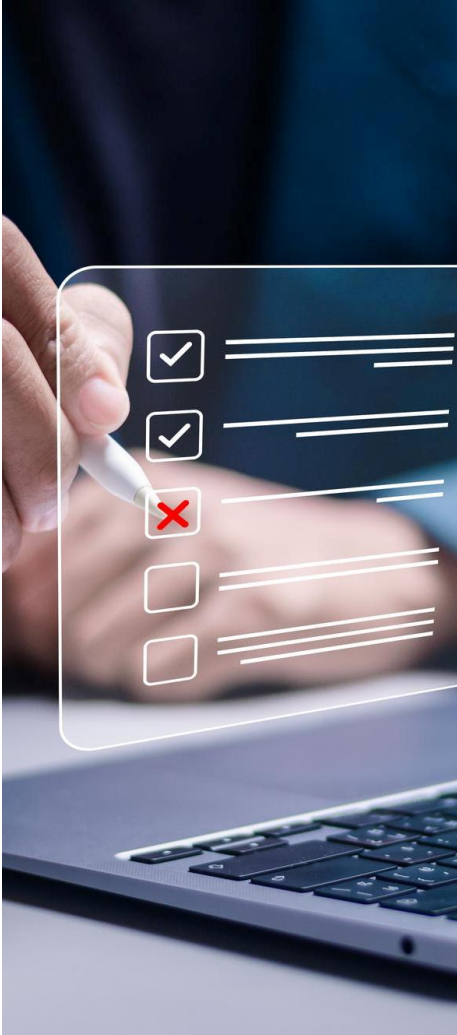
A diagram consisting of three circles arranged horizontally. The first circle on the left is blue and contains the word "Vision". The middle circle is orange and contains the word "Strategies". The third circle on the right is light blue and contains the word "Tactics". Each circle has a soft shadow beneath it.

Vision

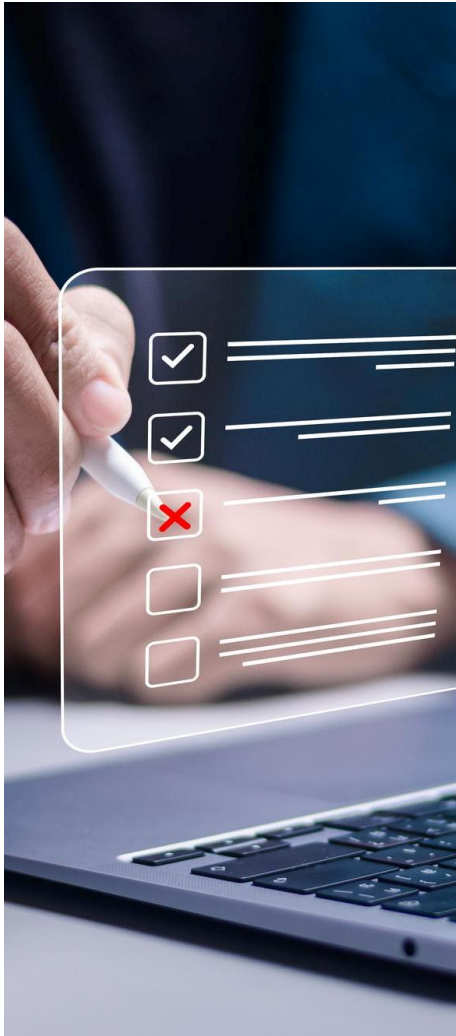
Strategies

Tactics

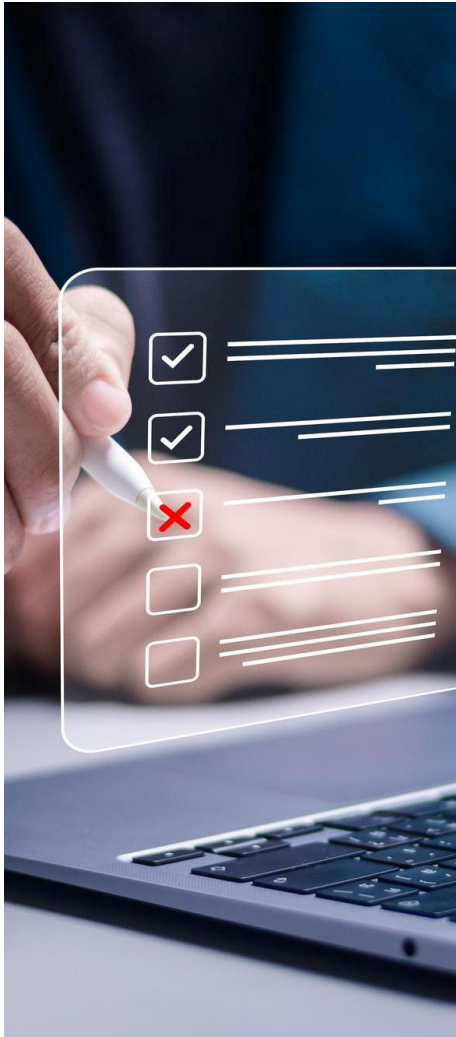
# Vision checklist



- **SIMPLE**  
Can you summarise what your plan is all about, in just a few words
- **COMPELLING**  
This needs to be compelling, something that everyone can get behind
- **ACHIEVABLE**  
Should also be achievable – in a reasonable time frame
- **FOCUSSED**  
Focussed on the category/shopper win, not your brand



- **CHOICEFUL**  
Be choiceful – it shouldn't be a long list of things, keep to a maximum of 3 or 4
- **UNIQUE**  
Make them unique to your category and shoppers
- **FOCUSSED**  
Remain focussed, what are the big things that will really move the dial (there isn't unlimited time and money!)



- **ACTIONABLE**  
Here's where we need to get detailed about what we'll actually do differently
- **COLLABORATIVE**  
Link with stakeholders is key here too – write these with your retailer?
- **SUITABLE**  
Be prepared to say 'no' to things if they aren't right for the plan



# VISION

## STRATEGY 1

Tactic 1

Tactic 2

Tactic 3

## STRATEGY 2

Tactic 1

Tactic 2

Tactic 3

## STRATEGY 3

Tactic 1

Tactic 2

Tactic 3

# Next time..

Next up



# HOW TO PREPARE FOR A RANGE REVIEW

7<sup>th</sup>  
May

11 AM

CATEGORY  
**HACKS**  
LESS WORK,  
MORE WINS!



[Register here!](#)



# HOW TO BUILD A CATEGORY STRATEGY



**CATEGORY  
HACKS**  
LESS WORK,  
MORE WINS!



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