



2023 FMCG Outlook Part 2:

Shifting Shopper Behaviours



Shifting Shopper Behaviours

Shopper behaviours can change rapidly. We only need to look to the pandemic to see the mammoth global shopping impact of instant disruptions to our supply chain – who can forget the great toilet paper frenzy of 2020!

But alongside pandemic turbulence came massive e-commerce growth and striking changes in consumption patterns. Now, add in skyrocketing inflation, rising energy and petrol costs, wages growth lagging inflation, and local and global supply chain issues; we know that many pandemic trends will remain embedded for the long term – shaped and reinforced by the new expectations of consumers navigating the cost-of-living crisis.

Yet not all pandemic innovations will survive as people respond to the soaring cost-of-living the best they can. But how we will behave will change swiftly as household budgets squeeze tighter, and price and value become even more intrinsic to shopping decisions. Loyalty will be tested. Values will be tested too.

Overwhelmingly, almost every Australian is ‘somewhat or extremely concerned’ about the effects of inflation (93 per cent)¹ and the cost of living is biting hard. At the time of writing, we were hit with a tenth consecutive interest rate hike and three-quarters told us they are concerned about the cost of general household bills (72 per cent), food and groceries (77 per cent), while half are worried about the cost of petrol (54 per cent) and their rent or mortgage payments (46 per cent).²

In a fifth consecutive decline, Australia’s household saving ratio fell to 4.1 per cent in the December 2022 quarter.³ This is unsurprising not only given the rising cost-of-living forcing us to dig into savings but the fact that around three in five of us planned to splurge pandemic savings last year on what we missed out on the two years prior: indulgent out-of-home activities such as travel, dining and personal services.⁴ In particular, Gen Z – our youngest consumers – value spending their money on authentic “betterment experiences”.⁵



¹IRI, AU Household Weight Jan 2023; base n = 5,031

²IRI, AU Household Weight Jan 2023; base n = 4,697

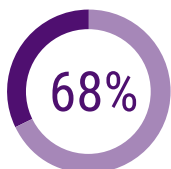
³Australian Bureau of Statistics, Australian Bureau of Statistics (December 2022), Australian National Accounts: National Income, Expenditure and Product, 1 March 2023, accessed 28 March 2023

⁴McKinsey & Co, Survey: Australian consumer sentiment during the coronavirus crisis, 17 October 2022, accessed 28 October 2022

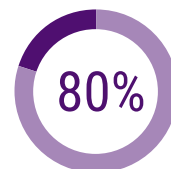
⁵M Merriman, How Gen Z is redefining success for decades to come, EY, 27 June 2022, accessed 28 October 2022

Australians are changing retailers for better value, convenience, availability and choice⁶

Value is now overwhelmingly behind why Australians are changing brands. Seven in 10 of us are now likely to make unplanned purchases after seeing products on promotion or discounted (68 per cent) or switch to a new brand if it offers new features or benefits that appeal (69 per cent), while 80 per cent now 'like to stock up when products are on sale' and two-thirds believe that retailer/own-label products are a good alternative to branded products.⁷ After value, sustainability for younger consumers and personal choice for older people is driving our purchase habits.



of shoppers make unplanned purchases after seeing products on promotion



of shoppers like to stock up when products are on sale

Almost seven in 10 are shopping online the same or more than they did a year ago (67 per cent).⁸ Yet, despite being more tech savvy thanks to the pandemic acceleration of e-commerce and purchasing from a wider variety of platforms to combat the effects of inflation on our hip pocket, people do also still value the in-store experience. Despite digital conveniences, physical retail remains the foundation of our customer experience.

As Jacquelyn Baker, Chief Commerce Experience Officer at VMLY&R Commerce writes,

“...the role of the store has changed for shoppers. Consumers can have whatever they want, when they want, on- demand, digitally. For purchases beyond everyday essentials meanwhile, the store serves more as a showroom for inspiration and ‘retailtainment’. Physical stores play a tactile purpose for consumers to immerse themselves in brands and experiences that ignite the senses and bring joy.”⁹



⁶As at August 2022. McKinsey & Co, Survey: Australian consumer sentiment during the coronavirus crisis, 17 October 2022, accessed 28 October 2022 7IRI, AU Household Weight Jan 2023; base n = 5,031

⁷IRI, AU Household Weight Jan 2023; base n = 5,031

⁸IRI, AU Household Weight Jan 2023; base n = 5,031

⁹A Kemp, The top three retail and e-commerce trends set to shape 2023, 20 September 2022, accessed 14 October 2022

FMCG ended 2022 with hopeful optimism and current data reveals that this was largely well-placed

We are cautiously optimistic for 2023. The \$120 billion Australian grocery channel is the heartbeat of the FMCG industry. Dollar sales are up 6.8 per cent compared to the prior year¹⁰ and unit prices up 8.6 per cent, reflecting the broader inflationary narrative of essentials now recording faster price increases than discretionary items.¹¹ However, grocery unit sales softness persists although the comparatives continue to be muddled by lapping Covid-led distortions in demand and sales patterns. Getting a clear view on whether Australians are overtly buying less to mitigate cost-of-living pressures is only going to be discernible in upcoming data flows.

\$120 billion Australian grocery channel:

6.8%



Dollar prices

8.6%



Unit prices

With unit sales still declining and inflationary pressures enduring, why the overarching optimism? What about the so-called 'mortgage cliff', widespread recession fears and signs that there are cracks appearing in retail sales? Clearly, there are many headwinds, but:

- The FMCG industry will be responsive to moderating inflationary pressures
- The industry will again benefit from resilience and 'safety in staples'
- A cooling-off in food service spending will be a boon to FMCG retail
- Retailer trips will increase, creating more opportunities for trade marketing
- Low unemployment and a net migration recovery will further cushion spending.

Your customer data is the critical link to winning with shoppers in this cost-of-living crisis

More than ever, you need to know how people feel and how they'll shop in the moment. It's all about the experience they have and how it relates to their new values – both on and offline. Australians are open to ordering directly from you and sharing their data if it will result in a better shopping experience or reward. This data will also help you manage the social impact of inflation by:

- differentiating and communicating what's right from profit gain
- supporting your customers by delivering and communicating price, value and experience.

You need to show your customers that you're going through this with them. Honesty and transparency underpin a solid relationship, especially during disruptive times. Getting your data and your omni-channel customer experience synchronised is critical. Your focus should be on an omni-channel strategy and the base for all planning. Gone are the days of looking at each channel independently. In 2023, it's all about an integrated lens on how the same shopper uniquely uses each channel on their disruptive path to purchase.

¹⁰For the 13 weeks ending 29/1/23

¹¹IRI Shopper Panel, Total Supermarket, MAT To 29/1/23 IRI is now Circana

The rise and diversity of value-conscious shoppers

The record high cost of doing business is passing on price increases to value-craving Australians. During the pandemic, manufacturers managed to increase FMCG product prices again and again without the normally expected corresponding decrease in sales volume. This was in part because retailers were reluctant to fully pass on price increases from producers to consumers.¹²

But in our current hyper-inflationary environment, things are very different as all parts of the supply chain are affected by inflation, continued extreme weather events and now soaring energy prices too.

The cost-of-living crisis is hitting Australian households hard.

The CommBank Household Spending Intentions retail spending index fell by 21.3 per cent¹³ in January 2023. Despite retail trade rising 5.9%¹⁴ in the year to January, the pace of inflation suggests rising weakness in the retail space. In particular, the last year delivered a shift in spending from goods to services. In retail, the largest lifts were in specialty retail, alcohol goods, family clothing and discount stores; with a spending decline at department stores, home supply warehouses, household appliance stores and furniture stores.¹⁵ For example, Baby Bunting's profit crashed in February as parents choose to forego toys¹⁶ while buy now, pay later (BNPL) debt is the highest that it has ever been¹⁷.

We're of course more focused on what we fill our trolleys with at the supermarket – and when. The average supermarket retail trips per shopper was down -3.7 per cent in January compared to the yearly average;¹⁸ however, more recently we are seeing an increase in shopper trips as we gravitate back to stores. Importantly, dollar sales are up +4.7 per cent, but more recent trading hints at an inflationary-led acceleration in sales growth while the uplift in dollars per trip (average \$53.99 +4.2%²⁰) is being driven by higher prices helping to compensate for the smaller baskets.

What is clear is that the cost-of-living crisis and skyrocketing interest rates will continue to hike up FMCG prices, and with this, elasticity will return, and brands that once felt immune to price sensitivity could see product volumes drop off a cliff. To avoid that outcome, brands and retailers need to plan for this likely scenario and be prepared to respond quickly when it occurs.²¹

¹²IRI Global, Managing price during turbulent times, April 2022, accessed 15 September 2022

¹³In original terms

¹⁴In original terms

¹⁵B Allen, HSI - Household Spending Intentions, CBA Household Spending Intentions - February 2023, CommBank, accessed 14 February 2023

¹⁶J Barrett, Baby Bunting profit crashes as parents forgo toys in cost-of-living crisis, 17 February 2023, The Guardian, accessed 17 February 2023

¹⁷J Beazley, Cost-of-living crisis drives vulnerable Australians to buy now, pay later schemes, consumer groups say, The Guardian, 24 January 2023, accessed 14 February 2023

¹⁸As at 29 January 2023 – Circana Shopper Panel

²⁰compared to the year average – Circana Shopper Panel

²¹IRI Global, Managing price during turbulent times, April 2022, accessed 15 September 2022

We want great prices and will try new products, services, brands or retailers for better value

Research shows that value for money is the primary driver of shopping behaviour for over four in ten Australians.²² While we'll pay more in some categories, Australians are switching brands or seeking promotions for essentials. In fact, perceived value has driven 56 per cent of Australians to a new store or brand in the last three months, while supply chain issues have also contributed to the three in five faced with stock-out issues when doing our grocery shop. It's a trend seen globally too. In a February 2023 survey, 96 per cent of global consumers said they intend to adopt cost-saving behaviours over the next six months; meanwhile, of the 40 per cent who intend to increase in-store and decrease online shopping, they say it's because the delivery costs are too high.²³

In response to the cost-of-living challenges, some leading global retailers are turning to artificial intelligence (AI) to help identify the right price, on the right product, at the right time.

Aussies seek value at the checkout



*Agree or strongly agree. IRI, AU Household Weight Jan 2023; base n = 5,031 products are on sale

It's also important to gain a better understanding of the generational values of shoppers

Millennials²⁴ are set to overtake Baby Boomers²⁵ as the largest generational group in Australia. In fact, Millennials are already the biggest-spending consumers, in both bricks and mortar stores and online, while Gen Z represent 18 per cent of the population.²⁶ Together this cohort are a rising force in retail shopping in Australia. Millennials and Gen Z currently account for 36 per cent of total retail spending and are forecast to account for 48 per cent by 2030 as Gen Z age and more enter the workforce.²⁷

Gen Z in particular, "presents tremendous opportunities for brands and retailers, but these digitally native, fiercely independent consumers approach shopping with very different expectations than prior generations. Gen Z expects brands to be authentic and understand them as unique individuals to earn their dollars... To win, brands must understand Gen Z's fluid needs and motivations, develop authentic, purpose-driven brand messages, and prioritise connecting with shoppers on the digital platforms – like TikTok, Snap, and YouTube – that most influence them."²⁸

²²CommBank, Aussie shoppers prioritising purpose, 6 April 2022, accessed 14 February 2023

²³PwC, February 2023 Global Consumer Insights Pulse Survey, 16 February 2023, accessed 24 March 2023

²⁴25-39 years old, 5.4 million people. S Mitchell, Retailers alert as Millennials, Zoomers take over from Boomers, AFR, 7 July 2022, accessed 14 February 2023

²⁵S Mitchell, Retailers alert as Millennials, Zoomers take over from Boomers, AFR, 7 July 2022, accessed 14 February 2023

²⁶S Mitchell, Retailers alert as Millennials, Zoomers take over from Boomers, AFR, 7 July 2022, accessed 14 February 2023

²⁷L Gillis, Media Release: IRI and The Female Quotient Publish Research Guiding Marketers in Connecting with Powerful New Shopper Population: Gen Z, 25 May 2022, accessed 28 October 2022

Is sustainable shopping sustainable in the cost-of-living crisis?

“In this sustainability-focused environment, brands that have sustainability at their core and within their value proposition will be positioned best to win over competitors that treat sustainability as a box-checking or risk-management tactic. The popularity of sustainably marketed products among young consumers points to an enduring demand. It’s a demand that every brand and retailer should respond to with true product innovation, authentic communication and a real commitment – because that’s what the most important consumers of the future expect.”²⁹

Joan Driggs, Circana and Randi Kronthal-Sacco, NYU Stern Center for Sustainable Business

Half of Australians tell us that they try to buy environmentally friendly products and 68 per cent are trying to purchase locally grown/made products over imported products when available.³⁰ Sustainability is particularly important for online shoppers, so it’s important to make it easy to find sustainable products online with ingredient lists, product origin and packaging recyclability information.³¹ For example, just one-third of Australians believe food/drink label claims on products are accurate and truthful.³²

Globally, consumers are prioritising affordability over sustainability for the first time since the middle of the pandemic.³³ But while 98 per cent of people across APAC are “prepared to take action to live in a more environmentally conscious way, they also expect brands to be part of the solution”.

Yet, for two-thirds, the increased cost of living and fact that too many sustainability products are still perceived to come at a premium³⁴ is preventing the conversion from intention into action.

While the desire of Australian households with lower incomes to live sustainably is higher today than the overall pre-pandemic average, a 2022 survey highlights challenges to shopping more sustainably range from pricing (41 per cent believe sustainable products are priced too high) to value (21 per cent believe that the quality of sustainable products is not consistent).³⁵ Another recent study reveals that over half of Australians believe that to live more sustainably, their cost of living would increase while one-third would consider living more sustainably if they knew it would save them money.³⁶

²⁹R Kronthal-Sacco, J Driggs, The Future of CPG Products Will Be Sustainable, NYU Stern Center for Sustainable Business and IRI, undated, accessed 14 February 2023

³⁰IRI, AU Household Weight Jan 2023; base n = 5,031

³¹IRI OmniConsumerTM Survey Solutions, June 2022, n=895; Top Product Information Types Online Shoppers Want to See. IRI, Sustainability and the Consumer, September 2022, accessed 14 February 2023

³²IRI, AU Household Weight Jan 2023; base n = 5,031

³³M Curtis, EY Future Consumer Index: Rising cost of living forces consumers to tighten grip on finances and get creative with sustainability, EY, 30 June 2022, accessed 14 February 2023

³⁴Kantar, Sustainability Sector Index 2022, accessed 14 February 2023,

³⁵PwC, Sustainability in Retail and Consumer Goods: Added cost or source of value?, 2022, accessed 14 February 2023

³⁶n=1,000 surveyed online between the 22-29 September 2022. IKEA Australia Sustainability Report 2022, accessed 14 February 2023

Despite inflationary pressures, sustainability still matters to all generations

All Australians are concerned by the ethical status of the products we buy and the companies we buy them from. For example, 53 per cent are willing to pay more to purchase from a purpose-led business with almost one in five willing to pay over 10 per cent more.³⁷ This rises to over seven in 10 Gen Z's who would pay higher prices for products from companies that align with their purpose and core beliefs.³⁸ Globally, more than seven in 10 consumers say "that 'to some or to a great extent' they're willing to pay more for food produced by local farmers and for goods made by a company known for ethical practices".³⁹

In the US, 27 per cent of shoppers – and 32 per cent of Gen Z and Millennials – are seeking out retailers that carry sustainable products, indicating a shopper preference that is likely to endure and increase over time. Tissue, personal care and dairy are among the categories with strong sustainable share, while chocolate and pet care are among categories with penetration less than five per cent sustainable share. Innovation that incorporates sustainable attributes can boost share but overall, 50 per cent of all new products in the US in 2021 were sustainable, up 20 percentage points from 2017⁴⁰.

But of note, US Gen Z and Millennials associate the term 'sustainability' with environmental factors more than older Americans.⁴¹ In the US, younger consumers are pushing for more sustainability, but Boomers and Gen X are driving sales today.

US Millennials purchase a significantly higher percentage of sustainably marketed products in carbonated beverages, cookies, frozen dinners, household cleaners and detergent, pet food, skin care and weight control.⁴²

It remains to be seen how the cost-of-living crisis will squash these sustainable behaviours. In the face of high inflation in the US, sustainability-marketed products outperformed conventionally marketed products across 36 categories, growing to 17.3 per cent of purchases in 2022. Yet, while they still enjoy a price premium of 27.6 per cent compared to their conventional counterparts, the price gap did narrow this past year as many conventional products executed above inflation price increases and several lower-priced conventional products added sustainable features.⁴³

The cost-of-living crisis in Australia is inadvertently forcing many people to think more sustainably especially as soaring energy prices force a review of household energy consumption and practices.

³⁷CommBank, CommBank Consumer Insights: The power of moving with purpose, March 2022, accessed 28 October 2022

³⁸CommBank, CommBank Consumer Insights: The power of moving with purpose, March 2022, accessed 28 October 2022

³⁹PwC, February 2023 Global Consumer Insights Pulse Survey, 16 February 2023, accessed 24 March 2023

⁴⁰Source: IRI POS data for MULO across 32 core cats.; Analysis by NYU Stern Center for Sustainable Business. R Kronthal-Sacco, J Driggs, The Future of CPG Products Will Be Sustainable, NYU Stern Center for Sustainable Business and IRI, undated, accessed 14 February 2023

⁴¹R Kronthal-Sacco, J Driggs, The Future of CPG Products Will Be Sustainable, NYU Stern Center for Sustainable Business and IRI, undated, accessed 14 February 2023

⁴²IRI Panel Data; Analysis by NYU Stern Center for Sustainable Business. R Kronthal-Sacco, J Driggs, The Future of CPG Products Will Be Sustainable, NYU Stern Center for Sustainable Business and IRI, undated, accessed 14 February 2023

⁴³IRI, Research from NYU Stern Center for Sustainable Business and Circana Shows Sustainability-Marketed Products Continue to Grow in the Face of High Inflation, 21 March 2023, accessed 28 March 2023

But is the current crisis is also making people more aware of wastage?

More than half of Australian adults admit to wasting money regularly (on average \$276 per month)⁴⁴ and as a nation, we waste 7.6 million tonnes per annum of food – enough to fill the Melbourne Cricket Ground almost nine times.⁴⁵ There is a clear need to help shoppers recognise the value of everything they shop for – and how to make the most of every purchase. For example, 'Use it up' is a national OzHarvest campaign that launched in September 2021 to tackle food waste at home. Seven months after the campaign launch, they found that people using both the 'Use it up' tape and cooking a weekly meal significantly reduced food waste by up to 30 per cent per week.⁴⁶



7.6M

tonnes of food is wasted
each year in Australia

Remember, sustainability is table stakes as more consumers purchase based on sustainable attributes such as recyclable, reusable, and biodegradable; and consciously shop at retailers committed to sustainability. Brands that have sustainability at their core as part of their value proposition are likely to fare better than ones that consider sustainability as risk management or risk avoidance. And the popularity of sustainably marketed products among younger consumers points to an enduring demand.⁴⁷



⁴⁴P Portman, 10.5 million Aussies admit to wasting thousands a year amid worsening cost-of-living crisis, Compare The Market, 8 February 2023, accessed 14 February 2023

⁴⁵The National Food Waste Summit, undated, accessed 14 February 2023

⁴⁶Based on a sample of 45 households. Monash Sustainable Development Institute, 'Use it Up' campaign reduces food waste at home by 30%, Monash University, 5 May 2022, accessed 14 February 2023

⁴⁷R Kronthal-Sacco, J Driggs, The Future of CPG Products Will Be Sustainable, NYU Stern Center for Sustainable Business and IRI, undated, accessed 14 February 2023

Knowing your shopper in the moment is key to the why behind the buy

The balance of power has shifted from retailers and manufacturers to the shopper. As Australians adapt and change how and when they shop, so do our expectations of an omni-channel experience in-store and online. Those brands and retailers that respond to individual shopper needs, especially during the current cost-of-living crisis will be the winners – just as we saw during the pandemic.

We expect value-based shopping behaviours to continue to define 2023. Successful brands and retailers must differentiate their customer types and quantify their sales contribution to prioritise initiatives. Through understanding the factors influencing or disrupting shopper behaviour, both manufacturers and retailers can more confidently adapt their strategies to better address specific needs and influence shopping behaviours to suit various shopper types on different occasions. Shopper research will enable you to understand the why behind the buy.

The omni-channel customer experience will be the most important part of the channel mix

Omni-channel shoppers are particularly highly valuable to grocery retailers, spending more than double what in-store only and online-only customers buy.⁴⁸ As more of us shop online, retailers and manufacturers alike must treat and analyse online channels as shopper-led businesses using data and technology. Putting shoppers at the heart of everything you do is critical.

Fast-tracking smart investment in data technology and shopper solutions will provide a clear 360-degree view on who your shoppers really are, and how to satisfy them.

Physical retailer websites are most frequently used for product information, online marketplaces and e-tailers for price comparisons, retailer apps for seeking out promotions, and social platforms for future purchase inspiration.⁴⁹ In-store display is a more important source of discovery⁵⁰ and physical stores remain vital for NPD trade marketing activity. And don't forget the user experience in e-commerce too. The whole umbrella experience considers every engagement, thought and feeling your customer has with your brand including how they engage on your platform – from search function to shopping cart. And it's vital to deliver and connect on every touchpoint. Online shoppers are also more loyal to retailers, so winning the omni-channel shopper is critical to capture their tendency to spend more share of wallet with a single retailer.

Retailers and suppliers should plan for the ongoing migration of customer spend to online transactions over the long-term and accelerate digital and e-commerce strategies accordingly. Do this by adequately investing (but at speed) in e-commerce capabilities that ultimately provide a better shopper customer experience.



⁴⁸IRI Shopper Panel, Total Supermarket Bricks & Mortar vs. Online, MAT To 27/02/22; *Coles Trading Update, February 2021

⁴⁹Monash Business School's Australian Consumer and Retail Studies (ACRS), n = 1,002; *aside from purchasing

⁵⁰IRI Shopper Panel Surveys, January/February 2022; n = 5,279; February 2021; n = 5,044; March 2020; n = 5,412

Investment in valuable data is not a cost, but a powerful solution to deliver ROI

To truly become shopper-led you must harness the power of Customer and Shopper Panel data. Combining these rich data sets reveals a total view of your shoppers today, as you analyse their attitudes and the motivations that will influence their behaviour tomorrow. Those that win will get smarter with their data investment sooner.

Unique proposition of shopper behaviour that customer data delivers	Unique proposition that shopper panel data delivers
Unmatched depth of information available to the store level	Unmatched breadth of information available to the retail banner level
Tagged transactions tied to unique customer (basket/behavioural data)	Most extensive view of demographic attributes based on actual shopper behaviour
Unique segmenting of shoppers and insight into their baskets	Extensive segmenting of shopper and buyer behaviour, with the distinctive benefit of linking claimed to actual behaviour
Combining both customer and shopper panel data is where the magic really happens	
Unparalleled breadth and depth of information available on shopper behaviour in multiple channels and retailers across grocery, pharmacy, liquor, petrol, convenience, speciality and e-commerce	
Unique segmenting of retailer loyalty cardholders to analyse their cross-channel, cross-retailer banner shopping behaviour	

Develop a deeper understanding of who your shoppers are, how they shop, and what they value

Longitudinal purchasing information from Australia's largest shopper panel provides one of the most powerful resources for developing a deeper understanding of who your shoppers are, how they shop, and what's important to them. Circana technologies enable us to efficiently mine the ongoing purchases of 13,000 households and classify shoppers based on specific purchasing behaviours.

Given a large proportion of shopping behaviour is often unconscious, carefully designed Circana Shopper Panel surveys provide the ability to understand the reasons behind verified purchase behaviours such as Heavy/Medium/Light and New/ Lapsed/ Retained purchasing though the reasons driving new product trial and rejection. Analysis of purchasing behaviours is further enriched by integrating the values, opinions and attitudes of these key shopper groups to overcome the universal challenge of shopper research – what shoppers say they do is not always what they actually do.

Knowing the shopper attitudes driving behaviours is key to unlocking loyalty and acquisition

We all know that what shoppers say and what they do can vary significantly. Circana's shopper surveys allow you to link shoppers' attitudes to their purchasing behaviour. Powered by the industry leading Shopper Panel, we can provide you with the ability to identify and engage with shoppers based on specific and verified shopping behaviours. The benefit? You can adapt your product and marketing strategies more confidently to better address specific needs and influence your shopper instore and online.

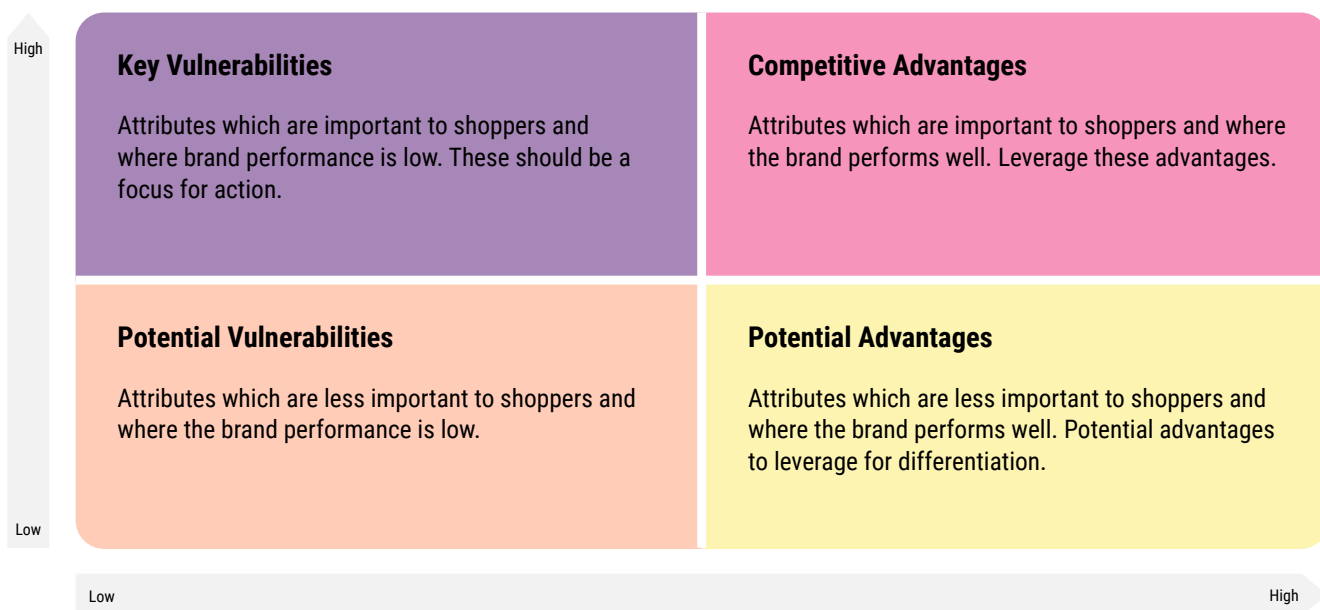
We intimately understand the ever-evolving FMCG landscape and how to integrate multiple datasets to deliver actionable insights into client business challenges across shopper activation, merchandising, revenue growth and marketing effectiveness. Our team brings deep industry knowledge and experience across analytics, retail, media and shopper research to ensure insights are delivered to support a broad base of users.

We link the shopper’s attitudes back to their actual purchasing behaviour to help you answer key business questions with confidence.

- Why are shoppers leaving your brand or purchasing less?
- Why are shoppers buying a lot or a little?
- Why did shoppers buy my new product and what did they think of it?
- What are the triggers/barriers to purchase the category/brand?
- What is important to shoppers when making a purchase in the category?
- How is your brand delivering against current shopper’s needs?

The ability to interact with actual brand and category buyers via the Circana Shopper Panel provides clear visibility of a brand’s competitive advantages and key vulnerabilities through uncovering the product attributes that are most important to shoppers – such as packaging, ingredients/formulation, flavour, provenance – and how your brand performs against these multiple attributes.

Perception Map
Category Attribute Importance vs. Brand Performance



This vital understanding of attribute importance and performance across those shopper groups that you must retain or need to win provides the ability to confidently improve product propositions, inform packaging and new product development and to ultimately communicate authentically with shoppers to grow mental availability. And in our new era where cost-of-living is reshaping our values and what value means to every single shopper, this is a true gamechanger.

Powered by our integrated and market-leading **technology, analytics, and Liquid Data™** we work with FMCG and retail businesses to deliver insight and consulting solutions to keep them ahead of the curve and deliver on customers' changing needs.

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