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BUYING THE BRAND AT THE POINT OF CHOICE

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INTRODUCTION

A Cyberhistorian in the year 2050 might be forgiven for thinking that the marketing world of the late 80's and first half of the 90's, was obsessed with two key issues - *the brand* and *the customer*. These two themes have been responsible for more conferences, seminars, workshops, books and articles in journals and the trade press than any others before. Whether marketing fast food, air tickets, hotels, leisure clubs, banking, insurance, hospitals, charities, food, alcohol, toiletries or household cleaners, the attention given nowadays to optimising the power of the brand to match or anticipate the rational and emotional needs of a defined set of customers (rather than a broad swathe of consumers), is dominating marketing and senior management time.

The same cyberhistorian might suffer from a headache if he attempted to read all the literature on how to manage *the brand* and how to understand the needs of *the customer*. By keying in these two words, he would obtain two distinct views - the one having very little connection with the other. The brand literature focuses on understanding how a brand is defined, constructed, managed, communicated, valued and its performance measured *in isolation from the human interface and contexts in which it operates*; the second focuses on understanding how people buy products and services how satisfied they are with them, the dynamics of purchasing behaviour, attitudes and usage patterns - relying on information that is often gathered at a separate time and place from the in-home and environmental contexts in which this behaviour takes place.

The authors believe that the current models and methods of researching the relationship between brand communications and purchasing behaviour/ attitudes are outmoded. In order for brands to survive in today's complex world and the even more complex world of the Millennium, an effort needs to be made to bridge the gap between our understanding of mass communication and our understanding of

individual behaviour in ways that have pragmatic applications for brand owners and marketing people.

This paper proposes a new way of thinking which extends the concept of ‘consumer research’ to include ‘moment of truth research’ and focuses on ‘the point of choice’ - the moment of purchase when an individual selects a brand from the shelf and places it in his/her shopping basket. The re- direction of emphasis attempts to explain the interface between:

- the way in which brands communicate through advertising, packaging and promotions at a mass or *macro level*
- the cues that influence purchase consumption in different environments (supermarket, cornershop, off licence and garage forecourt) at the *macro level*
- the Need.States (mindsets/circumstances) which drive the relevance of the brand to an individual at that particular point in time - *micro level*.

In essence the paper sets out to provide guidance for a question which is frequently posed by brand owners nowadays:

‘How can we position the brand more accurately against the needs of specific customers - as individuals or clusters of individuals (rather than mass market stereotypes) - so increasing the relevance of the brand and therefore its long-term profitability’.

The authors of this paper come from two different disciplines -Wendy Gordon’s approach is grounded in anthropology and psychology and Virginia Valentine’s in semiotics. The secondary objective of the paper is to explore the extent to which combining our different disciplines could lead to insights that neither could reach alone—and thus help to extend the parameters in which market research operates.

THE HYPOTHESIS

The main hypotheses of the paper is that there is *a point of time and space* at which the elements of mass marketing - product, advertising,

packaging design, promotion, merchandising - can (or cannot) be orchestrated to leverage the brand's values so it appears to meet the particular needs and set of circumstances of an individual customer.

Most market research is based on methodologies that investigate the relationship people have with brands, at a point of time and space very separate and distant from the point of choice. By choice, we mean the moment when a brand is selected from its competitive context in the retail outlet. There are other points of choice eg the moment when someone selects a brand from a repertoire in the kitchen cupboard, fridge, freezer, bathroom cabinet; the moment when a choice is made which fast food outlet to visit, which TV programme to watch and so on. We have confined this paper to the retail point of choice.

Research conventions of data collection ask people questions about their purchase behaviour well before they make a purchase or some time after it (eg what brand do you usually buy? Which of these brands do you buy nowadays? Which of these brands do you intend to buy next time? Why did you choose Brand X last time you bought?). Whilst nothing is wrong with these questions, they assume that the information mirrors purchase behaviour/attitudes at the moment of choice, which is not necessarily the case. For example, the purchase of own-label products is frequently underestimated by this kind of questioning, just as the purchase of environmentally friendly products is overclaimed. People insist they are not influenced by advertising and promotions at point of choice and strenuously deny the influence of packaging design and format. People 'blame' their children or partners for the purchase of brands which do not fit an idealised self-image or resort to facile rationalisations of 'convenience' or 'habit' to explain behaviour.

This paper argues that the point of choice is worthy of attention in its own right. There are thousands of cues which are being processed by a shopper in a fraction of a second. These are simply unavailable to market researchers away from this context, not because the individual is trying to suppress them, but because many operate subliminally.

We believe that brands could have a greater relationship with consumers if the way in which purchase environments influence choice and how shoppers cope with

complexity are understood. Brand communications could then be devised with more relevance than is often the case.

Often brand managers devise myopic strategies for the brand, based on little or no consumer research at the point of choice. The result is that the brand is developed in a vacuum and success is serendipitous.

THE RESEARCH PROGRAMME

To test this hypothesis, we carried out a two-stage piece of research at the points of choice of four product categories:

- shampoos
- savoury biscuits
- beers
- cereals

in four types of retail outlet

- supermarkets
- CTNs
- garage forecourts
- off licences

Our main objective was to explore the terrain of the point of choice. We really did not know what was out there, what it is that consumers face in total at this defining moment of purchase—and the strategies they devise for exercising brand choice.

From this, we set ourselves two tasks.

1. To begin to define new issues that brand management needs to address in developing a more effective mix
2. To outline the scope of new research models that can feed more accurately into the brand development task

Referring to figure 1, the mass communication context was tackled by a semiotic overview of the way the four categories of products are sold in each outlet. This comprised an analysis of the visual, verbal and spatial languages of

store design and interiors

merchandising

packaging

promotions

The individual customer behaviour began by in-home qualitative interviews with a sample of 20 consumers about their usage of products in the four categories.

Respondents were asked to show where the brands were kept in home, an audit of each category was undertaken and reasons for the depth and breadth of repertoire in each category fully explored.

In addition each respondent was asked to keep a usage diary for a week, so that the Need.State framework (()) could be established, as well as retailer outlet perceptions and usage.

Each respondent was then accompanied in two different retail outlets and the relevant categories explored at point of choice. For example one person was accompanied to a supermarket and an off licence to talk through the beer category in the light of his Need.State framework and attitudes to retailers established earlier, whilst another was accompanied to a supermarket and corner shop to discuss shampoos and cereal. In total, some three hours was spent with each individual person. The sample details are shown in the appendix.

THE POINT OF CHOICE

A SEMIOTIC MAP

All human beings by virtue of being a member of a particular culture or sub-group interpret the world about them through signs (visual, verbal, spatial) which have

become meaningful symbols of social values, attitudes and beliefs. This sign-symbol relationship is what semiotics is all about¹

Whilst the role of advertising and packaging in creating symbolic meaning around a brand has been frequently discussed by many of the best marketing and academic thinkers in the world, little attention has been given to the specific meanings created by the confluence of signs that confront the consumer at point of choice.

To begin our investigation therefore we constructed a theoretical map of the terrain we wanted to investigate.

What or where is 'the point of choice'

Semiotically, the brand's point of choice lies at the intersection of several 'meaning' spaces:

- the cultural meaning of the outlet
- the meaning of the category
- the market context - the meaning conveyed by competitive activity
- the meaning created by the reality of the brand's position on shelf
- the packaging codes of the product field and the brand's pack codes within it

and several 'times'

- cultural time of trends and shared meanings
- remembered time of brand advertising
- immediate time of promotions

The figure shows how a brand is given meaning by its contexts. The heart of the brand is understood by brand owners and can often be expressed in a phrase or a few words. The other meaning spaces come from the contexts in which the brand must operate.

These include: its packaging (perhaps represented across a range), its competitive context (in store), the category meanings and conventions (the cultural role of the

¹ Semiotics or semiology derives from the Greek word *seme*, meaning *sign*

product which give rise to the visual, verbal and symbolic references used in the category communications) and finally the cultural attitude to different retail outlets.

Like a ball rolling along, these point of choice contexts are both influenced and change over time.

Each of these time-meaning contexts has a role in influencing brand perceptions at point of choice.

4.1 The cultural meaning of the outlet

Supermarkets, CTNs, garage forecourt shops, off licences, corner shops, neighbourhood chains (such as 7-11's) are not simply different retailing operations. They mean different things in our culture and communicate this difference through different semiotic strategies that drive design and merchandising.

The ordered aisles of the supermarket; the higgledy-piggledy clutter of the corner shop; the car context of the forecourt; the alcohol focus of the off-licence and the convenience emphasis of a 7-11 styled outlet are all read at a subconscious level and thus influence consumer perceptions of a brand and its place in their lives.

Hypothetically, a brand bought in a supermarket as part of the organised weekly shop signals something different from the same brand bought as an emergency purchase in a crowded corner shop. The brand meaning changes subtly.

4.2 The Meaning of the Category - Its 'Discourse'

The language and imagery we have in our heads for any product category structures the way we think about it. We think quite differently, for instance, about cosmetics and toiletries than we do about beer, not just because they play different roles in our lives but because they have a different discourse (ie language of meanings and communication).

Ideally product categories should be spatially separated on the grounds that they can activate separate discourses in our heads and can therefore tap into appropriate 'feelings'. But this isn't always possible.

It's easier in a superstore where toiletry departments can be physically situated away from, say, household goods and where there is room to design a 'department' within the category discourse (Tesco's mirrored, soft-lit silver Health and Beauty units for instance). But disjunctive departments do have to butt up against one another, and if the discourse is ruptured too violently, it may make it impossible for people to 'think' themselves from one sector to another quickly enough.

Their defence might then be to rush for the nearest recognisable pack on the shelf or to resort to a coping strategy.

The problem is compounded in smaller outlets, such as corner shops or forecourts, where everything is jumbled up - toiletries are of necessity sited alongside soft drinks and the ice cream sits opposite the dog food. The point here is that, if the discourse is compromised by proximity to something quite other, it could well affect perceptions of the legitimacy of brands within it, leading to the totally irrational sort of belief we all nevertheless understand, that somehow the bottle of Pantene from the garage is not as good as that bought from the supermarket or, better still, Boots.

As a corollary, of course where the discourse is concentrated on one field, like alcohol in an off-licence, most products on sale can draw from it - but how do chocolate count-lines that are trying to communicate their own brand values fare in there?

4. 3. The Meaning Conveyed by Competitive Activity

Whether competitive activity in a category is intense (high energy) or calm (low energy) should theoretically make a difference to the task that the brand faces in gaining share of presence on the shelf and the consumer faces in making a choice.

The degree of energy and fragmentation assumes that the shopper has a level of involvement and interest in the category, with the role of the product and therefore with the brand promise(s). The greater the fragmentation, the higher the involvement is the assumption, as is evidenced by the difference in the approach to pack copy between, say, shampoos and savoury biscuits.

This in turn reflects back on the demands made on the advertising and, indeed, to the need for synergy between advertising, packaging, promotions and merchandising.

Different product categories also either divide into segments, or fragment into niches - or else remain truly mass (although it has to be said that the latter is now becoming almost unknown nowadays).

But what happens when consumers either can't or won't comply with the market assumptions? When they haven't the time or inclination to put in the involvement?

Do they ignore the context and go straight for 'their' brand? Do they search for advertising recall to act as a trigger? Buy Own Label to simplify the decision?

If we find ways of researching the equation between market energy and consumer levels of involvement, we can begin to develop hypotheses about the way brands can stand out from the crowd in both high and low energy contexts.

This could cover such issues as:-

- the amount of pack copy that consumers can/will take in
 - from the whole merchandising
 - from each pack
- the degree to which pack graphics should relate to advertising
 - to simplify the choice
 - to hike up the level of involvement
- the level of importance carried by brand name outside pack graphics (think of Chicken Tonight or Domestos)
- the type of promotions. Do they need to:
 - match the level of energy to create the right degree of involvement?
 - cut through it?
 - enhance it?

4.4 The Meaning Created by the Reality of The Brand's Position On Shelf

Our analysis suggested that different merchandising space-where a brand is placed on the shelf - sends different messages to consumers about the retailer's view of how s/he will 'see' and understand the brand.

Take for example the bottom shelf. Clearly this position says, “you will look for me”. If it’s at your eyeline, then it is assumed to ‘catch your eye’. If it’s at the top it might be saying “look up to me”.

Searching for something is active, whereas catching the eye is passive - but these assumptions could conflict with other information we have about the mode in which people shop the category. Research tells us that savoury biscuits and for some people, breakfast cereal, are low-level interest product categories. If a brand in one of these categories is on the bottom shelf, does that reflect the interest level (I know what I want so I'll just reach down and get it)? Or does it actually assume a much higher level of 'search-me-out' interest that places a greater responsibility on the shopper to seek it out than s/he is prepared to make - and how does that affect frequency of purchase or loyalty?

Conversely shampoos and other personal care items create much more interest and consumers tell us that they switch regularly between brands in this field, but is that because these brands are merchandised to ‘catch your eye’.

Which comes first? The position on the shelf or the level of interest. And, if a brand is placed in on a lower shelf does that signal a tacit assumption that it is not active in the transaction? A lazy or complacent brand, maybe?

4.5 How Packs Communicate Brand Meaning

Given that the pack is the representation of the brand at the point of choice, it is reasonable to assume that packaging design will be synthesised closely with advertising and other brand communication strategies. However we know that this is not always the case.

Sometimes there is the imposition of a global pack while the advertising is UK specific. Sometimes, very often in fact, the pack was designed many decades ago and has either remained unchanged or has evolved minimally and slowly and there is also an underlying belief that consumers will ‘recognise’ the pack and too radical a change will destroy this important purchase trigger. Mostly, the reason is that advertising and packaging are seen by brand owners as separate processes and are the responsibility of different sets of people, none of whom want to be hamstrung by the creative solutions of the other.

However, there are very good theoretical reasons for questioning whether packaging in general is actually leveraging brand values to the degree that it might.

4. 5. i. The codes of packaging

Brand packaging communicates in the context of its competition and of related products by virtue of conforming to a design code that shows which field they belong to. This is the dynamic that allows own label to insert itself within a product field and claim a credibility without advertising. For example, Frequent Wash codes were originally Timotei codes; coffee codes borrowed from Nescafé...and so on.

Consumers look for these codes as an extra reassurance, but they also become inured to them. New advertising campaigns inject new interest in the brand; packaging remains much more constant and therefore has less energy. It becomes a much more passive brand communicator. Although there are exceptions to this passivity of packaging, the majority of brands in fmcg marketing can be criticised on this point.

The activity of own label also diffuses the impact of brand packaging. Once the codes have been taken up by own label, they have moved from brand to category. In this context, the brand pack may simply just be adding to the confusion by losing its uniqueness.

4.5. ii The use of metaphor and metonymy

There are two other theoretical constructs which are useful to bear in mind when analysing the packs within a category - metaphor and metonymy, the two major communications systems on which all our communication and interpretation is based²

We are much more familiar with metaphor because we learn about it at school. Metaphor is the communication mode that connects with the human imagination and results in an immediate emotional connection - like a shot of adrenaline in the mind. Metaphor is a right brain experience relying on visual and spatial processing of symbols and common meanings. Metonymy, on the other hand, is a communication system that we never study because we take it for granted. Metonymy connects with

² See Valentine and Evans, The Dark Side of The Onion, rethinking the meanings of rational and emotional response, MTS Conference 1993

rational explanations, with facts and knowledge and therefore with concepts and propositions which generate a much more considered response.

Metaphor is upfront creativity. Metonymy is verbal or visual language quietly going about its business as a transparent communications vehicle. The mode of this paper is metonymic.

Colour, shape, symbols and graphics are usually metaphorical. Pack copy, illustrations, photographs and ingredient lists are usually metonymic. Ideally, packs should be designed so that the two devices are working synergistically, but sometimes they conflict with one another, diluting the message.

THE POINT OF CHOICE

2. THE CONSUMER EXPERIENCE

5.1 The Cultural Meaning

The cultural meaning of the retail spaces turned out to have enormous importance for consumer behaviour and self-perception and to exercise very real influence on the point of choice.

Specifically we found that brand values are affected by the difference between environments which are set up to construct a planned shop—and those which construct the purchase as either impulse or emergency.

Consumers position the same brand along a continuum from efficient planning to total 'fancy', depending on the cultural perceptions of the store/shop.

PLANNED-----SMALL TOP-UP----EMERGENCY---IMPULSE			
Supermarket	Corner store	Corner Store	Corner store/
		CTN/Garage	CTN/Garage
Off-licence party			Off-licence treat

<i>What I'm looking for 'always buy'</i>	<i>What I need</i>	<i>What I'm desperate for</i>	<i>What I fancy</i>
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5. 1. I Supermarkets

The semiotic analysis suggested that the orderliness of large supermarkets with their communication strategies of logical sequence, efficient shopping messages eg large shopping trolleys with space for a child and baby, crèches, packers, bulk packaging formats, value for money cues etc, is a rhetorical device persuading the customer that the supermarket shop is an expression of *efficient domestic management* . This would explain the buried reason behind anger people feel when the shelves are moved around and when partners interfere with habitual behaviour

The research appeared to confirm this hypothesis. The environment encourages bulk purchasing and has become a weekly, bi-weekly or fortnightly ritual for the majority of people. People enter the supermarket in a rational frame of mind and start at one end, systematically working their way round to the other end. The standardised, familiar and unchanging layout rewards the shopper by reinforcing an emotional sense of order and control of the world, whilst the bounteous shelves, variety of choice, value for money makes the shopper feel affluent and comforted.

‘The supermarket shop’ equates with planning and forethought and therefore impulse purchasing which *does* take place tends to be rationalised - ‘I was seduced by the interesting shaped packaging’, ‘my 18 month old child was hungry so I bought rice cakes to keep him quiet’, ‘ I gave myself a treat with this hair repair cream which was on offer next to my usual brand of shampoo’. The transcripts of the in-home interviews give the impression of pre-planned lists with little room for manoeuvre; the accompanied shops to the supermarkets demonstrated the amount of impulse shopping that actually takes place.

5. 1. 2. Corner Store

The small supermarket/cornershop is referred to by most in a very personal way - ‘I’m off to VJ’s/Dales/the Indian shop/ the little shop down the High Street’ etc. Most

people equate visits to this kind of retailer with emergency refills or even desperate purchases. Associations are usually negative- small, cramped, dusty, limited choice, claustrophobic, expensive, a rip off. There is *a sense of dishonesty* that is connected with the experience - suspicion on the part of the shopper about the prices and quality and the uncomfortable feeling that the owner in his/her turn suspects the shopper of shop lifting.

Again most of this is explained by the semiotics of immediacy and disjuncture. The retailer hasn't really got a 'plan'. so how can the consumer be expected to have one.

There is also an interesting correlation one can draw between the degree to which we allow ourselves to give in to the impulse of unplanned purchase—and the sense that some super-ego is sitting in judgement on us.

However, in-store a different experience occurs across some of the categories examined. The local 'corner shop' is also an Aladdin's cave which can encourage impulse purchases especially of interesting ethnic foods or unusual one-off items such as soft drinks or snacks. These are usually selected once the main purpose of the visit has been fulfilled - the re-stocking of a familiar repertoire brand of cereal, shampoo or other products. Bright colours, higgledy piggledy merchandising, small baskets and exciting products, all of which can have connotations of single quantities, help encourage experimentation, discovery and impulsive purchasing.

The problem here is that such shopping environments are so opposite to that of the contemporary cultural norm of the supermarket, they have come to signal that the shopper is *an inefficient domestic manager*, and consequently this explains the often-felt strong need to stick to known brands and to downplay the rewards of discovery that are experienced on many visits.

In this environment, tertiary or unfamiliar brands are suspected to be of poorer quality-' and thus the need for brand reassurance is heightened -'I saw Kellogg's Frosties standing out from all the rest like a tree on a hilltop'!

Interestingly, when away from the retail outlet, people have a more negative view of the experience than the actual accompanied interview suggested. This is because they are not recalling the real experience, but are thinking culturally. If certain slightly specialised brands—such as fresh soups, sauces, ready-prepared foods (or even big players like BirdsEye MenuMasters)—could leverage the discovery element of the

corner shop, they could possibly give themselves a second bite of the cherry, where currently the brand presence is almost working in antipathy to the environment,

5. 1. 3. Garage forecourts

These outlets strongly communicate convenience not simply because they are open late or even because they stock basic lines, but also because the purchase is usually made in the ‘on-the-move’ circumstances of motoring. This taps into a cultural framework that includes immediate consumption, supplies for a journey, rations and holidays. These shared meaning-systems then encourage impulse purchasing - ‘might as well pick it up while I’m here’- fancying and indulging rather than the forward planning meaning system operating in the supermarket which encourages consumption elsewhere.

The big pay desk at the end of the aisles dominating the vision compounds this. It connotes the idea that people have come into the shop in paying mode, having already bought what they came for—the planned purchase—*on the forecourt outside*. By definition therefore, anything non motoring-related they collect on your way to this big brother of a till must be, by very definition, an unplanned impulse purchase.

People band the garage forecourt together with the corner shop as the last resort for staple items for the home on the grounds of expense, limited range and frequently, suspicion about quality and freshness. The value to brands of these outlets, however, lies in the way they encourage impulse and treat purchases - ‘I get in the mood to buy silly nibbles like crisps and chocolate’, ‘I get tempted to buy a can of coke, the paper and a lottery ticket when I buy petrol’.

Often, people are unable to articulate the reasons for purchase beyond clichés such as ‘I just fancied this’. Brands of cereal, shampoo and savoury biscuits operate here in the same way as a corner shop - reliance on well known, reputable brands to compensate for underlying anxieties about quality or freshness or to reassert order and control.

But countline and snack brands could optimise this impulse semiotics via promotions (Wendy...will you put in some of your examples/ideas here, obviously without giving too much away!)

5.1. 4 Off licences

The single discourse of off-licences was translated by consumers as the province of specialists who offer the shopper advice and expertise if required. With the exception of 'the party' and Christmas' this type of outlet is associated with spur of the moment visits and price is less of an issue. Accompanied shopping reveals that people tend to browse, demonstrating less hurry and greater involvement with the point of choice than in the corner shop or garage forecourt. The visit can be a treat and because the purchase of alcohol is often not part of the weekly household shop, there is more experimentation with novelty products. The absence of trolleys or baskets, encourages carry out quantities (1,2,4, or 6 not cases of 12 or 24).

However the perceived attitude of the manager is important. Women feel able to ask advice about wine but less at ease in asking about beer since 'you'd feel stupid wouldn't you, like a dumb woman...perhaps he would think that you fancied him or something.' Men feel able to talk about niche beers but in the mainstream sectors, make choices based on brand familiarity and preference. One of the key triggers is the fridge which often determines choice of brand. What is at the front of the fridge or easily grabbable is selected - 'you can't root around too much at the back of the fridge' - and what is not visible is not bought off the shelves.

Coldness is a key trigger for the purchase of beer (metaphorically and physically) - a motivational driver which is under-utilised by many retail environments. And the one clear case we found of the importance of merchadising on the point of choice

5.2 The Meaning of the Category Discourse

The research found that categories *do* have different languages and conventions which make it difficult for people to transit, seaaamlessly, from one to another, just as travelling from one country to another can be difficult.

Consumers say that the language and discourse of alcohol (wine, spirits and specialist/mainstream beer) is dissonant with many of the adjacent categories in a supermarket. Furthermore siting of this category 'at the back' or 'the end' of the normal route communicates that this category is not part of the mainstream 'shop' and therefore can be omitted. Another example is the extremely crowded beauty-based shampoo/conditioner haircare category which is often too close to the hygiene categories like toothpaste and mouthwashes. Supermarket fixtures in this category tend to be organised by brand rather than function and shoppers compare this

unfavourably to Boots where not only are shampoos separated from conditioners and hair treatment products, but the meta-message of health and beauty specialists, helps the transit between categories.

Codification by brand assumes that consumers are buying the name rather than the product category. The difference is important for the point of choice because it removes one layer of control from people. Not 'will you have savoury biscuits in your cupboard', but 'we know that you will have savoury biscuits, you just need to decide which brand'.

Creating a discourse aura

A 'shop within a shop' is becoming more common nowadays e.g. in-store bakery, rotisserie, pick'n mix cheese/jam, ethnic fixture and so on. These create a discourse aura (a metaphorical and physical ringfence) which helps to centre the meaning of the category and hence influence the behaviour of shoppers.

The research indicates that category ringfencing gives people a breather and, in our conclusions we will suggest ways in which brand communications could create such a discourse aura for themselves.

5.3 The Competitive Context

5.3.1 Editing Strategy in Fragmented Markets

The shopping visits indicated that energy levels do have an effect and that people are more involved and interested in the fragmented categories like shampoos, cereals and premium/niche beer (rather than mainstream lager/bitter or savoury biscuits). However, the findings here show that personal mood also drives response, particularly to high energy markets.

Perception of time is crucial since if the shopper feels relaxed, fragmented categories encourage exploration and treat/impulse purchase, whereas if the shopper feels hurried, then the competitive complexity of the category requires the implementation of a coping strategy.

The Need.State framework

One of the main ways in which people cope with competitive complexity is to edit the choice at point of decision, blocking out any sector, brand or offer that might detract from concentration. The Need.State framework for understanding decision making is helpful in this context. Need.States can be defined as clusters of needs and circumstances, both emotional and rational, which combine together to direct or predispose an individual to one brand (or repertoire of brands) rather than another.

As discussed in this paper, there are an enormous number of triggers at the point of choice that have to be decoded rapidly otherwise we would be paralysed by indecision. Each individual has a number of dominant Need.States which serve to select that part of the fixture he/she wishes to experience at any one time. He/she then chunks down as if changing gears in a car - from cereals to healthy cereals, from general healthy cereals to those that my children will eat, from acceptable healthy cereals for my children to Honey Nut Loops or Weetabix Chex, from big boxes to those that fit into the cupboard, to what is best value today? This procedure happens in a fraction of a second - the Need.State (healthy cereals for children) shortcuts the selection process. This explains why so many new products and variants go unnoticed on the shelves.

Shoppers approach the point of choice with key Need.States in mind and attention is paid only to the brand(s) which match the dominant Need.State.

Only when there is strong external influence through point of sale material or advertising which creates cut-through, will the usual repertoire selections be altered.

The shopping behaviour modes

Need.States differ in energy levels which in turn translate into shopping behaviour in different categories. There are three types of shopping behaviour which one individual can display within a single retailer, changing behaviour by product category. The three modes of shopping are

Blinkered

Magpie

Browser.

In Blinkered mode, the individual whizzes past the fixture grabbing brands with speed and certainty. If stopped at the end of the fixture where such behaviour occurs and asked to explain the reasons for brand choice, the most frequent response is 'it's the one I usually buy'. The purchase has become highly automatic and ritualised.

In another part of the supermarket, the individual stops and becomes involved with the products and brands on the fixture. He/she can be seen to be picking up different brands and searching along the fixture and if stopped at the end would answer the question by saying 'I felt like buying something different for a change'. The purchase is often rewarding - a small impulsive treat.

Finally, we might observe the person in Browser mode - intently comparing two items or brands or comparing ingredients or price. The reason given for purchase will be easier to articulate. The purchase is more rational i.e. reasoned.

The main point to be made here is that people demonstrate all three modes of purchase - sometimes all three occur on one single purchase occasion such as a visit to a supermarket for the weekly shop and sometimes people have different modes of purchase for different occasions. In a supermarket we are responding to our Need.State 'bank', whilst on a single occasion it might be a dominant Need.State.

The shampoo category elicits Magpie or Browser behaviour most often, whereas Savoury biscuits are often shopped in Blinkered mode. Cereals are frequently shopped in Blinkered mode except when children are present.

Browser behaviour occurs in off-licences and also in corner shops but they differ in function for many people. The former is about pleasure or leisure enjoyment; the latter about reading labels and checking sell-by dates.

Mode of shopping has important implications for packaging. A pack has to work far harder to attract attention if the category is often shopped in Blinkered than if it is shopped in Magpie mode.

5.3.2 The Meaning of Shelf-positioning

Shoppers know the category layout of retailers they visit regularly. They also know where to find sub-category brands and own label. It is widely understood that new, heavily advertised brands, promotions, or brands/own label the retailer 'want to

push', are placed at eye level. These are the products people claim 'caught my eye' - a reason for trial or impulse purchase.

The top and bottom shelves signify 'look-for-me' and classic brands or own label are understood to be placed there, signifying brand confidence.

In truth, however, we found that, although theoretically there are different meanings attached to levels of merchandising, in practise it is very difficult to generalise about shelf positioning. Different types of retailers (off licences, corner shops etc.) and different retailers within supermarkets adopt different strategies and therefore useful learning is only possible through custom designed research.

Perhaps the one thing we can say that the emotional and cultural need to think of oneself as an efficient and well-planned shopper would argue for more consistency of the positioning of high frequency items. Perhaps brand managers should consult with the armies of merchandisers and shelf stackers about this.

Certainly we would argue that positioning on shelf is part of the brand mix for consumers at the point of choice—even if it doesn't feature in the marketing plan.

5.4 Communication - Packaging, Advertising and Promotions

5.4.1 Packaging

The accompanied shops yielded some valuable insights into the way in which packaging, advertising and promotions work at the point of choice. Brand or category cut-through is often achieved through sensory metaphorical triggers of touch smell, colour and shape. In the shampoo category, people admitted to smelling shampoos in-store (sometimes surreptitiously). The tactile impression of the pack format and graphics of Pantene Pro-V (the silvery sheen communicating shiny, smooth hair) was noted frequently as was the matt dark green smooth shape of Organics which signified natural earthiness and good-for-hair qualities.

In cereals the shiny glossy packs of branded cereal conveyed appetite appeal far more strongly than the perceived wishy-washy colours of some own-label, re-enforcing at a metaphorical level, expected inferiority of taste and texture. This was not true of all own label cereals. For some customers, the retailer brand is seen to be 'as good as the

brand leader' with positive pack cues. Garish packs, especially when the brand is less familiar can discourage purchase in this category ('rubbish') as well as in the shampoo category ('bright yellow packs look unnatural as if they contain stripper'—a purely metaphorical imaginary response).

Repeatedly, during the accompanied shops, respondents decoded metaphorical packaging tactics that encapsulated the sensory characteristics of the brand - a creamy biscuity texture for Jacob's Cream Crackers, the authentic Italian crunch of Waitrose Grissini breadsticks, the childhood associations of Cocopops with its chocolatey yumminess, Sainsbury's Coconut shampoo in a clear bottle containing pearly thick liquid, 'a wonderful smell promising me luscious hair'.

Format differences which break conventions of pack codes in a category are a powerful means of differentiation. Individually wrapped Jacobs crackers, Quaker Oats in an oval shaped box and unusual brands of beer/lager (Sapporo Dry, a distinctively shaped can) are noticed in speedy search-scans along the fixture.

Own Label

The research also reinforced the view that when own label assumes the codes of a successful product/brand, it is able to communicate desired product values and positioning without advertising. However, shoppers do respond in unexpected ways and there is a thin red line. In one case an own label shampoo copied the packaging code of Pantene Pro-V (centre shelf presence at the time of research), charging a premium over and above its standard shampoo. This was rejected by the shopper in favour of the brand - 'the real one is only a little more expensive'. In most cases, however, copycat strategy is extremely successful in communicating 'just as good - but not the same' qualities as the brand.

Clearly, however, there is a price trade-off which cannot be violated. The consumer will buy into the semiotics of 'just as good as' but only if it demonstrably costs 'not as much as'.

4.4.2 Advertising

The relationship of advertising and packaging for a brand is a question that every brand manager grapples with at some time. Should there be a connection or not? And how direct should this connection be? There are marketing professionals who believe

the advertising should jump into the consumer's mind as soon as the pack is noticed. Others believe that associations are built through advertising over a long period of time, but that these are not accessible to recall as a replay video or Xerox copy of an actual commercial or press advertisement but as a deconstructed set of associations.

Surprisingly both views have validity in the real point of choice environment. Special K and Castlemaine XXXX packaging are good examples of direct line access to the advertising. Both women and men link the white pack with the red 'K' to a white beach with the girl dancing in a red swimsuit taking out messages of fitness, beauty or health. In the context of walls of beer in green, blue, brown and black, the yellow of Castlemaine XXXX stands out and links with the 'in your face' machismo of the Australian desert settings and characters in the campaign as well as with the confidence of the recent poster campaign.

Devices such as Tony the Tiger on pack help people access the advertising and conversely advertising jingles sometimes appear to hover over the brand eg. 'Have you had your Weetabix?' imbuing a rather 'boring and unappetising pack' with associations of energy and substantiality.

Kellogg's Cornflakes with its simple pack graphics but its massive brand advertising presence acts as a tabula rasa on which people project the most meaningful advertising messages - a man talks about the brand as a classic traditional family brand referring to a recent advertising execution, a young woman talks about the brand in connection with 'the munchies' recalling the late night student execution.

In some cases there appears to be a contradiction between brand advertising and brand packaging. Organics is such a brand with a high tech advertising execution and natural earthy looking pack design, Salon Selectives also clashes in terms of advertising message and pack interpretations. Whether or not this works positively (synergistically through some kind of tension) or whether there is conflict and hence a deletion of one or other message, requires an understanding of the brand strategy and a more focused research study. What is clear from this study, however, is that, where this dissonance exists, shoppers resort to pack copy to bridge the gap. At the point of choice, this demands time. If time is unavailable, the Need.State framework or other coping strategies will come into play.

From this exercise, we would say that the current practice of researching pack development in isolation in the laboratory does not address the real issues of the role in the mix at the point of choice.

5.4.3 Promotions

In market research interviews (both qualitative and quantitative) people tend to downplay the importance of promotions. This is why they are so difficult to pre-test and predict take-up. In-home audits of brand repertoires combined with accompanying the same individual to a retail outlet shows how important promotions really are in influencing choice.

There is nothing surprising in the type of promotions which work. In cereals, promotions on pack aimed at children are successful despite mothers claiming not to give in to pester power. Two for one or three for two offers are popular for regular repertoire brands which have a high frequency of usage eg shampoos and cereals, whereas marked down offers attract more attention for brands and products which are used infrequently.

This, of course taps into the cultural values of planned and unplanned shopping. 3 for 2 of what you always buy is a symbol of good planning. You were going to get them anyhow, so the promotion is an added stroke of efficiency. Conversely, the special offer low price is by definition a one-off event, which then connotes impulse—and tapping into a planned purchase is only serendipitous.

Extra cans of beer or 33% extra work for men in off-licences both for choice within the normal repertoire but also for encouraging trial of a new brand because these tap into immediate gratification motivations for purchasing in this outlet.

There is a suggestion that promotions are noticed when they are part of the category rather than spatially separated). This is because people respond to offers on repertoire brands at the moment of choice.

The relationship of promotion to the pack graphics is worth a brief comment. Sometimes a promotion on a regular brand causes *avoidance* because the aesthetic appearance of the pack has been altered. Some consumers, especially in the shampoo category, display packs in the bathroom and bold price or promotional graphics are seen 'to cheapen' the brand and adversely effect self image.

5. CONCLUSIONS & IMPLICATIONS

First of all, we should say that the breadth and depth of the actual project turned out to be much greater than the scope of this one paper. Within the space available here, we have only been able to chart the terrain and there is much work still to be done.

However, this does not affect the main thrust of our findings. We believe that the combined insights of understanding the theory of mass communications, combined with practical research in-home and in-store concentrating on the point of choice has led to a level of understanding that might not have been possible by other research/analysis methodologies.

We are now also convinced that the point of choice is a real marketing phenomenon. Both in terms of mass communication and consumer perception of the experience there are forces at work which affect the ability of the main organs of marketing—advertising and packaging—to influence choice

There are a number important strategic implications for brand owners and marketing communication specialists (advertising, packaging, promotions merchandising) which ought to be explored in the process of developing a long term strategy for the brand.

- All retail outlets are *not* the same. The way their different strategies engender a sense of the planned, emergency or impulse shop has a very real effect on the point of choice.

A brand carries thus different meanings in different retail contexts and this provides an opportunity that can be leveraged. For example, there is an opening for more exciting npd in the savoury biscuit category in the contexts of garage forecourts and corner shops (on-the-move, impulse, snack); there is also an opportunity to alcohol to be merchandised differently in supermarkets from off-licences. And niche brands could optimise the discovery element of the cornerstore.

The planned-impulse continuum also has a bearing on promotional strategies. Promotions which assume bulk purchase are consonant with the efficient shopping plan and should be reflected even in such detail as the

type face. And the opportunity for impulse promotions in garage forecourts seems hardly to have been noticed. Banded offers, family pick n mix packs—all are worth investigating.

- Within larger retail outlets, there is untapped potential to create a ‘discourse aura’ for a brand - a way of using point of purchase materials and pack design graphics/format to *separate the brand* from its competitors, communicating desirable brand values in the process. This is particularly fundamental to shampoo and other healthy/beauty toiletries, alcohol, and savoury biscuit categories.
- In high competitive categories or crowded retail environment, purchaser involvement cannot be taken for granted. However, an aggressive ‘discourse aura’ can be created through a combination of mass communication tools. Advertising and packaging *must* work together to create strong cut-through. This can be achieved in one of two ways: *surface synergy* using common branding devices, logo’s, characters, symbols) or *structural synergy* whereby both advertising and packaging communicate the core values and positioning of the brand, in different but complementary ways. Promotions can be executed synergistically too - a fact often ignored.
 - Pack design (graphics, format and material) must be active () and work hard to energise the brand at point of choice. This can be achieved by the use of metaphor (visual symbols, colour, shape, feel, smell) which is far more powerful in demanding attention than verbal pack copy or a rational explanations of benefits.

These elements of design are seldom understood by either marketers or researchers. There is a major imperative to develop more focused and theoretical approaches to pack research based on the way they actually work at the point of choice.