

Case Study

Mindlab used implicit research to understand how the COVID-19 pandemic influenced shopper decision-making

Key Points

- Mindlab has developed a powerful and proprietary implicit research methodology for understanding shopper purchase decision hierarchies.
- Our client needed to understand how shopper purchase decision-making in three core Personal and Oral Care categories had altered since the start of the COVID-19 pandemic.
- Mindlab's insights enabled the client to re-align their category management and product communication strategies to ensure they are absolutely relevant to current shopper priorities.

Mindlab recently received an urgent client brief – from a major international personal and oral care brand – to use our implicit research platform to help them understand how the COVID-19 pandemic had impacted shopper purchase decision-making behaviour in several key categories.

The study was undertaken in Germany and UK.

How Mindlab measures Purchase Decision Making

Mindlab's implicit platform is flexible and scalable, and can consider dozens of different dimensions relevant to a consumer's purchase journey. These Attributes can relate to ideas like pricing, features, and benefits, and so on, whatever is on your mind when you shop for a particular product.

We had completed similar studies for the same client and categories pre-pandemic (2019), meaning we could re-use the same category Attributes and methodology to ensure a like-for-like comparison.

In the online study, hundreds of shoppers were shown randomly chosen pairs of these shopping Attributes and asked to tell us – as quickly as possible across a number of trials to ensure a System 1-based response – which Attribute is more important to them when they shop for the category of interest to the client.

We captured both participant response time (a measure of the strength of intuitive engagement with an Attribute) and the choice itself. A faster time of response is a clear indication of strong intuitive engagement with an Attribute, making it more important in the shopper journey. Slower responses point to lower emotional engagement, and hence lower importance in the purchase journey.

After mapping, analysing, and visualising our data, we discovered some dramatic and surprising results.

You can read about them on the next page.

Insights – the topline

Shoppers for Personal Care and Oral Care are making less confident, more deliberate, more influenceable decisions compared to pre-pandemic.

Brands stand to benefit from the reduction in decision confidence: shoppers now place significantly more trust in Brands than pre-pandemic.

The upswing in frequent and thorough personal care routines has made ideas of efficacy and ingredients a much more important part of shopper decision making, especially for Personal Care, where anti-bac is the leading driver of the decision hierarchy.

Although Pricing is now of lesser influence in the PDH, shoppers are as keen as ever to feel they are getting good value for money.



We discovered some dramatic and surprising results.

Overall, the study demonstrated how much *less intuitive* shopper decision making became in the categories we studied. A significant slow-down in reaction times vs. the pre-pandemic showed that shoppers were now less reliant on gut feeling, and now thinking with much more *deliberation*. Why?

The COVID-19 pandemic necessitated a few significant shifts in our attitudes. The renewed importance of effective personal care – such as hand washing – *made personal hygiene both a critical self-care activity and a communal responsibility*. We all thought more carefully about what we purchased.

Shopper feelings about the Attribute *Anti-Bacterial* had transformed, becoming very strongly intuitive. We felt this pointed to the heightened concern for cleanliness shared by us all. Shoppers also responded to the need for more frequent and prolonged usage of personal care products to stay clean by placing a much greater priority on Attributes such as *Ease Of Use* and *Natural Ingredients*. While *Natural Ingredients* might seem at odds with *Anti-Bacterial*, we felt confident this represented a generalised concern for being kind to your skin when washing hands longer and frequently.

Brands were the big winners in the study. This especially related to *Brand Trust*, which experienced a big increase to a high level of decision influence. There seemed to be a strong connection between more deliberate, less confident, decision making and a more strongly implicit trust of Brands, their products, and by inference their claims and promises.

A combination of supply-side problems reducing product choice instore, increased demand reducing store inventory, and anxiety to purchase the right product, saw Attributes relating to *Price* become generally less intuitive and less popular than pre-COVID.

As with *Price*, supply and demand issues and extended wait times instore times seemed to explain a big upswing of interest in *Large Packaging Sizes* and *Refillable Packaging*.

Overall, we discovered that shoppers were making more deliberate decisions when they shop. They sought products with a heightened concern for efficacy, with a revitalised sense of trust in brands, with price as a more secondary concern