



Category Entry Points & Mental Availability

Growing Retail Brands Strategically and Sustainably

In a nutshell, brand growth hinges on two important factors...



Purchase Availability

= Being easy to find and buy

i.e., your brand has a wide distribution network (online/offline), sufficient shelf space, recognizable packaging, prominent in-store positioning, favorable pricing, a flawless check-out process.



Mental Availability

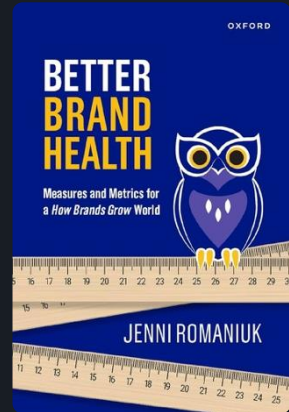
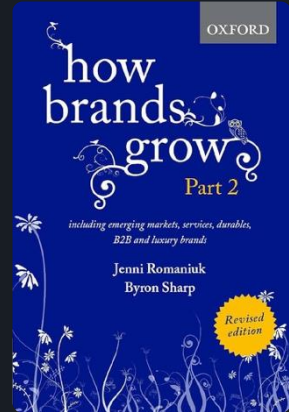
= Being easy to think of

i.e., consumers have an easy time retrieving your brand from memory when buying the category. Your brand easily pops up in consumers' mind in a multitude of relevant buying occasions, so called **Category Entry Points (CEPs)**

Mental Availability is one of the strongest predictors of actual consumer buying behavior – and therefore **brand growth**.

It can strongly explain a brand's Sales Market Share.

$(R^2 > .85)$



Category Entry Points...?

CEPs are all situations, occasions and need states that turn a person from an individual into a “category buyer”



Locations (Where?)

e.g. on the go,
from home



Motivations (Why? For what?)

e.g. to buy fresh produce, to buy
meat, to buy household goods



Feelings & Needs (How?)

e.g. when I want a treat,
when I want a stress-free
experience



Timing (When? How long?)

e.g. late at night, during the week,
on the weekend



People (With / for whom?)

e.g. shopping for family,
shopping for myself



Co-purchases (With what?)

e.g. to combine with other errands



Co-activities (While?)

e.g. while on a walk,
while watching Netflix



The mental connections between brands and CEPs lead to **three KPIs** that are extremely relevant for **brand growth and success!**



MPen

**Mental
Penetration**



MMS

**Mental Market
Share**



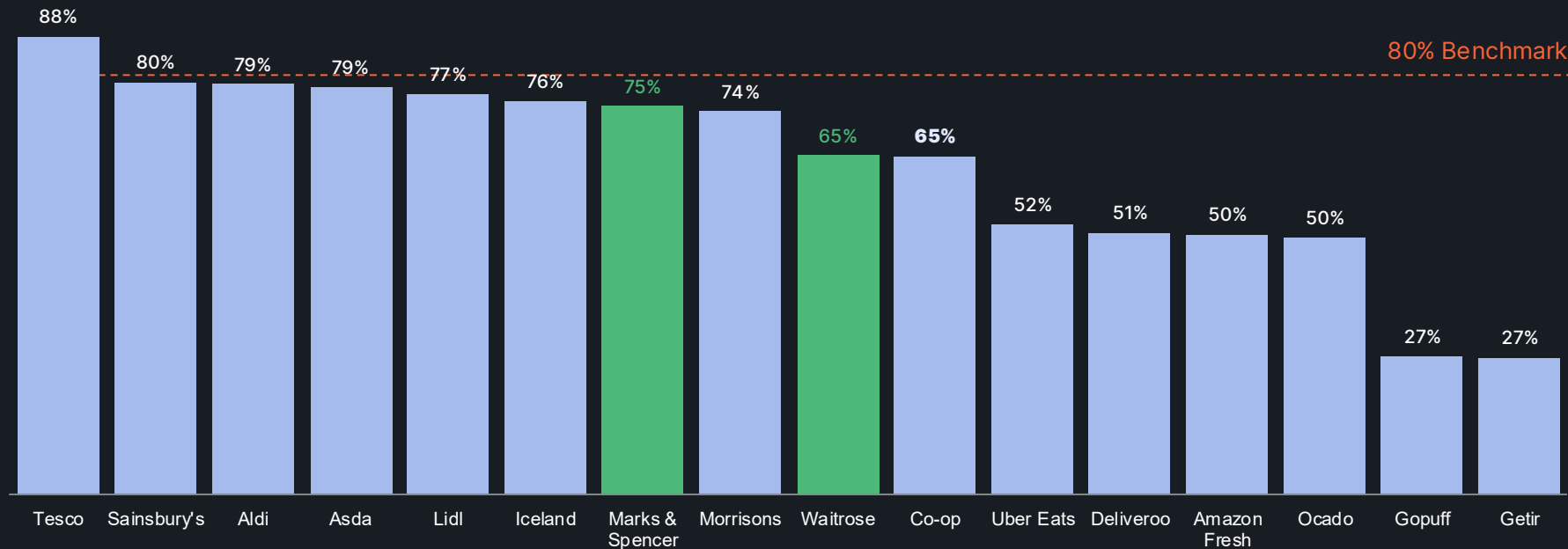
NS

**Network
Size**

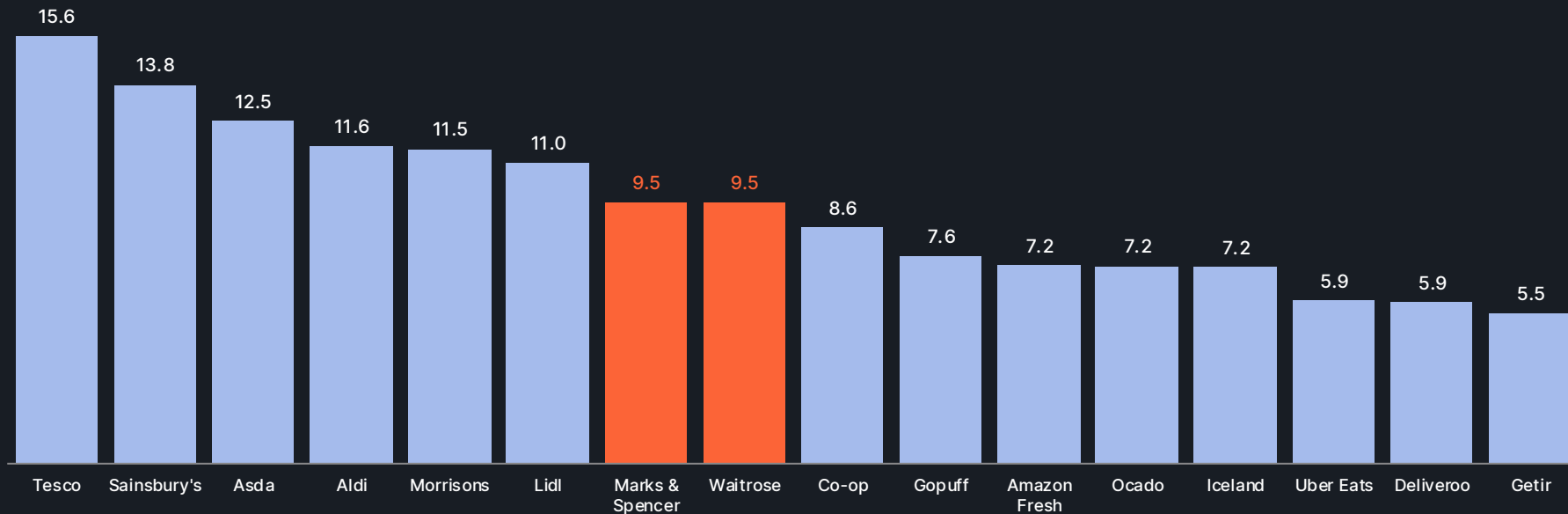
Today's Focus: M&S vs. Waitrose



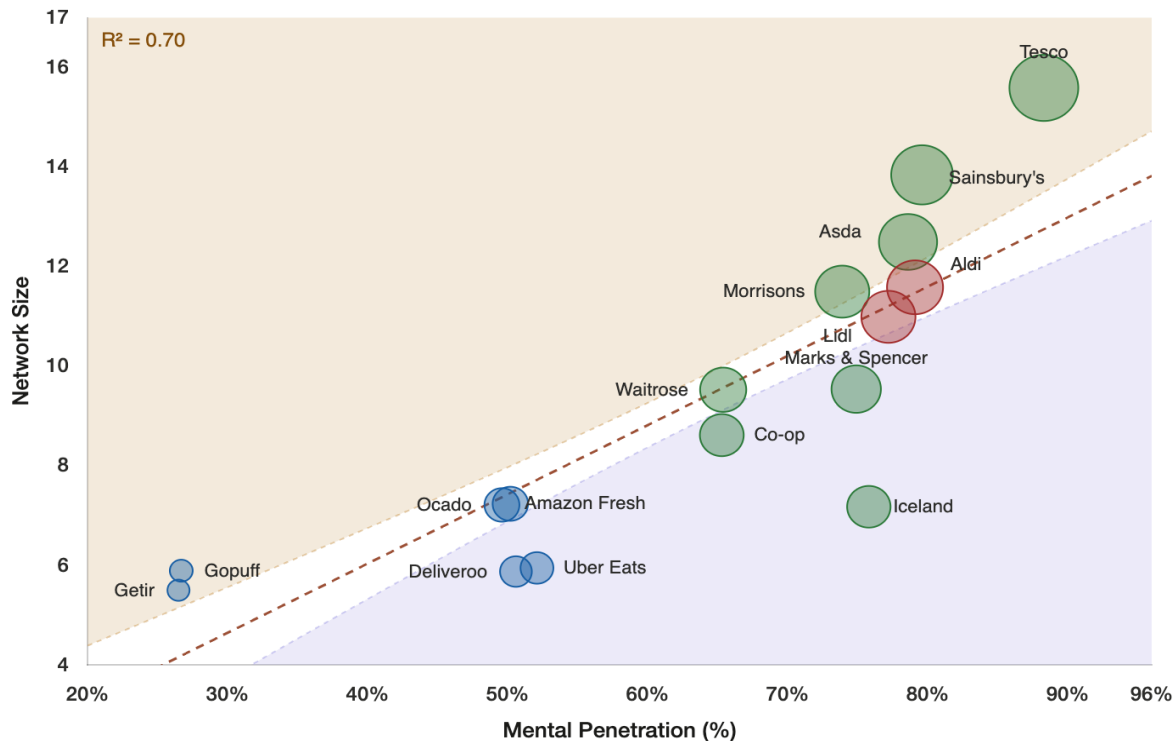
75% of shoppers associate M&S with at least one CEP, a healthy **Mental Penetration** value close to the benchmark, while Waitrose clearly lags behind!



M&S is connected to **30%** of all CEPs on average – a **Network Size** that is much lower than we would expect based on brand size, especially compared with Waitrose



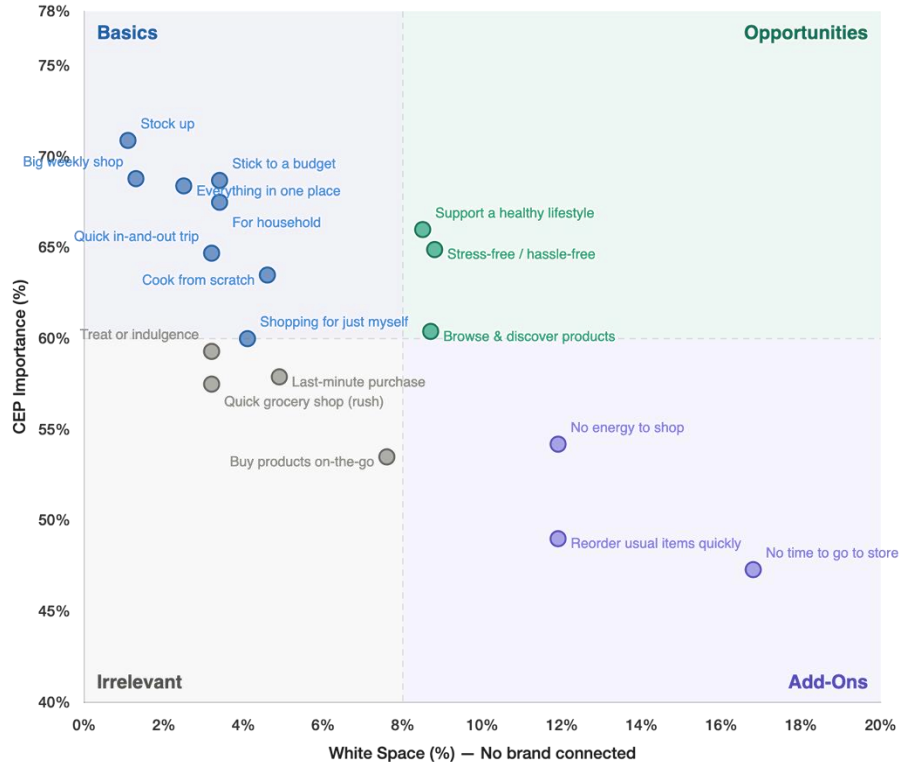
While Waitrose's MPen-to-NS ratio is healthy, **M&S clearly needs to improve on its Network Size** = Build broader memory networks with consumers



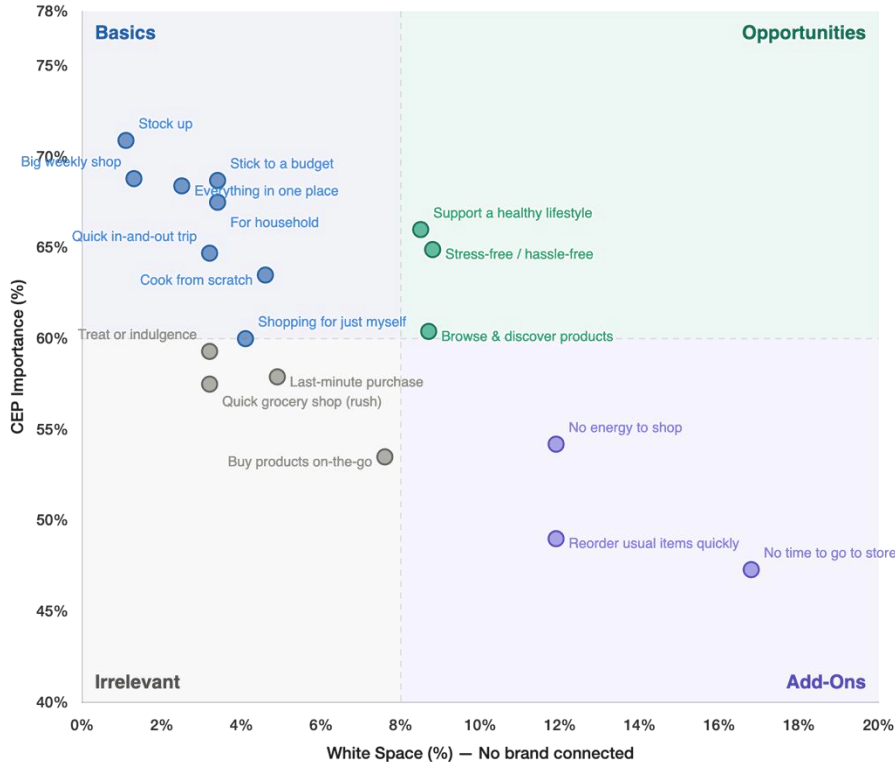
On the other hand, Waitrose struggles to turn its Mental Market Share into actual Sales – Waitrose needs to tackle Physical Availability (# of stores, e-com)



Let's take a deeper look into the actual CEPs for Grocery Shopping Basics, Opportunities & Add-Ons...



...and whether it is easy or difficult to think of M&S / Waitrose in these CEPs: Similar profiles with big gaps on Basics – M&S with strong overreliance on Indulgence



CEPs	Imp.	Online and offline	
		Waitrose	Marks & Spencer
Basics Stock up for the week ahead	71%	-1.8%	-6.9%
Basics Big weekly shop	69%	-1.1%	-7.5%
Basics Stick to a budget	69%	-4.6%	-8.9%
Basics Everything in one place	68%	-1.0%	-5.6%
Basics Shopping for household/family	68%	-1.4%	-2.1%
Opportunities Support a healthy lifestyle	66%	+5.9%	+7.0%
Opportunities Stress-free / hassle-free	65%	-1.0%	+0.8%
Basics Quick in-and-out trip	65%	-1.6%	-1.4%
Basics Cook from scratch	64%	+2.4%	-1.7%
Opportunities Browse & discover products	60%	+7.3%	+13.2%
Basics Shopping for just myself	60%	+0.5%	+6.8%
Irrelevant Treat or indulgence	59%	+12.4%	+25.3%
Irrelevant Last-minute purchase	58%	-1.9%	-0.5%
Irrelevant Quick grocery shop (rush)	58%	-3.1%	-3.9%
Add-Ons No energy to shop properly	54%	-3.2%	-5.0%
Irrelevant Buy products on-the-go	54%	-2.3%	+2.7%
Add-Ons Reorder usual items quickly	49%	-2.1%	-5.5%
Add-Ons No time to go to a store	47%	-3.5%	-6.6%

Summary

Key Brand Learnings for Future Growth

Waitrose

Increase **mental penetration** (= reach more category buyers) and double-down on **physical availability** (both online and offline) to better convert strong awareness into sales.

M&S

Expand **network size** beyond narrow treating positioning by building relevance in **everyday shopping needs** and white spaces such as “**stress-free shopping**”.

Summary

Key Category Learnings



Use **Category Entry Points** to win the pre-journey battle and become the default choice before before customers even consider alternative brands.



Linking **mental and physical** availability is the strongest predictor of future sales. Brand awareness alone will never be enough.

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