



defining  
**shopper insights**  
our framework  
of understanding

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The Hartman Group, Inc.

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# defining shopper insights

## our framework of understanding

One of the fundamental challenges with a study of this magnitude was to bring some order and clarity to the rapidly emerging field known loosely as “shopper insights.” Marketers, brand managers, analysts and others have for several years now recognized the important interplay between consumer behavior and consumer experience in the retail setting. Many consulting agencies now specialize in the retail sector, often staffed by employees with novel titles such as “director of retail innovations.” Yet, despite all of the assorted research, dialogues, discussions and strategizing, we’ve witnessed little concrete progress in the pursuit of a comprehensive, integrated understanding of shopping behavior. This study is a pioneering effort in that direction.

We begin with a seemingly straightforward, yet surprisingly challenging proposition: a definition. Looking critically at the field in its current state, we find a variety of orientations whose only commonality is their oddly narrow scope and vision.

### Studying Only What Happens at Point of Sale

Some in the analyst community define “shopper insights” simply as the analysis of consumer purchase data. Convinced that aggregate patterns in IRI scan data might reveal important clues as to underlying drivers of consumer shopping behavior, many have devoted significant resources to this task. While we were admittedly interested in this proposition some 15 years ago, our early experiences left us more than frustrated, a position no doubt shared by many in this business. While such data prove useful from an operations and supply-chain perspective, they simply fail to deliver insight into the motivations, idiosyncrasies and habits that drive human behavior.



### Studying Only Purchase Intent

Others conduct VALS-style research, attempting to segregate shoppers into unique lifestyle segments where they can be further deconstructed in order to understand what makes the shopping beast tick. In a similar vein, we also note that several recent studies have defined shopper insights more narrowly as the study of consumer need gaps as they relate to specific kinds of shopping trips. Either way, the goal is the same: Get inside the consumer's brain to better understand their behavior.

### Studying Only How the Shopper's Body Moves Through the Store

Naturalistic retail analysis, such as that pioneered by Paco Underhill, was a big hit a few years ago, offering innovative portraits of consumer shopping behavior in varied retail settings. These approaches, however, fail to explain *why* and *how* these behaviors happen and whether or not they connect to larger cultural or social forces beyond the store. The shopping experience, after all, is about far more than ergonomics.

Considered as a group, then, we believe all of the approaches outlined above focus far too narrowly on specific psychological and physical behavioral aspects of the shopping experience. Their lack of holism proves to be their downfall, as retailers and manufacturers struggle for insights to drive genuine innovation. The problem, as we see it, is that the insights generated do not help clients break with established tactical tool-sets and genuinely see shopping from a consumer perspective, in all its complexity.

## THG's Approach to Shopper Insights

Our general belief is that definitions should be as inclusive as possible. Recognizing the inherent complexity—and frequent unpredictability—of human behavior, we prefer to have at our disposal the widest array of understandings and tools when attempting to make sense of consumer behavior. Hence, we choose to define Shopper Insights as follows:

**That which is necessary to properly understand the role of the shopping experience with regard to purchase behavior (in specific) as well as brand loyalty (in general).**

On the surface, this definition may strike some as mundane and/or simplistic, yet its application proved anything but. By not constraining our methodological tools, as well as the boundaries of investigation, we encountered remarkably unexpected, and richly rewarding, insights.

Turning to specifics, our first decision was to deploy the widest variety of methods we have ever utilized in a single research project. These methods included (a) comprehensive analyses of consumer life histories, (b) ethnographic accounts of consumer home life, (c) multiple retail observations with identical consumers, (d) extended retail ethnographic observations and (e) detailed quantitative data collection and analyses. This combination of methods was critical as it allowed us to capture the richest detail possible in the wide spectrum of consumer behavior.



Additionally, we settled on the unique perspective that “shopper insights” could have as much to do with things that happen outside the store as they do with things that happen inside the store. To unilaterally declare a priori that “shopper insights” must be concerned with things that happen inside a retail setting struck us as unnecessarily restrictive, especially given the relative infancy of this field of study. Social scientists studying behavior as diverse as crime, courtship and worship, having long recognized that one’s home life is an important determinant in any model of human behavior, never restrict their scope of research to the home. So, why should the study of shopping be any exception?

To give the reader a concrete example of this holistic approach in action, we interviewed a set of consumers for three hours each—including extensive pantry tours—before later observing these same consumers in action, as they shopped for their families on four to five subsequent grocery shopping trips throughout a four-week period. So rather than trusting consumers in single in-home interviews to accurately predict their shopping behavior or relying on consumers encountered within in-store intercepts to reliably describe their home lives, we were able to repeatedly compare and contrast multiple data points. This method allowed us to gain critical insight into the intersection of routine home-life and everyday shopping behavior.

### 5 Common Myths About Shopping Behavior

As a fundamental platform of understanding shopper insights, we have identified a collection of commonly held assumptions, assumptions shared by the analyst community and THG alike, which failed to materialize as relevant to an integrated perspective on Shopper Insights.

#### MYTH 1. Brand Loyalty Drives Shopping Behavior

**MYTH:** Consumer interest in specific brands or products drives shopping behavior in consistently meaningful ways in grocery, drug and mass retailing.

**REALITY:** Most consumers orient themselves to shopping based on “how do I get what I need?” and “where should I shop for it?” Brand loyalty falls to the wayside for the sake of “getting things done.”

With the somewhat rare exception of consumers on targeted shopping trips seeking very specific products or ingredients (e.g., recipe completion shopping), most consumers orient themselves to the shopping experience by going through the following highly generalized decision tree:

- 1) What tasks motivate me to go shopping?
- 2) Where can I get the stuff to accomplish these tasks?
- 3) When can I get to stores that will get me this stuff?

Our evidence indicates that consumers begin almost all shopping occasions long before they get in the

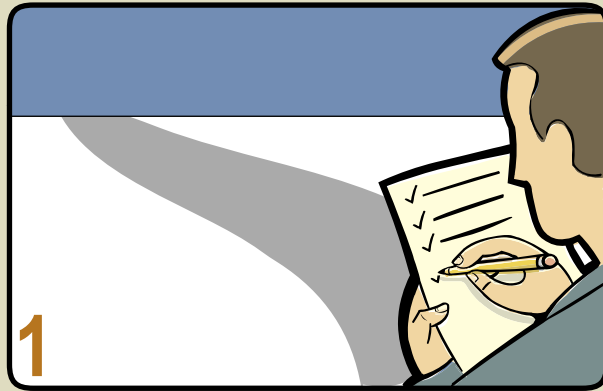
“Shopper insights” should have as much to do with things that happen outside the store as they do with things that happen inside the store.



## 5 Common Myths of Shopping Behavior

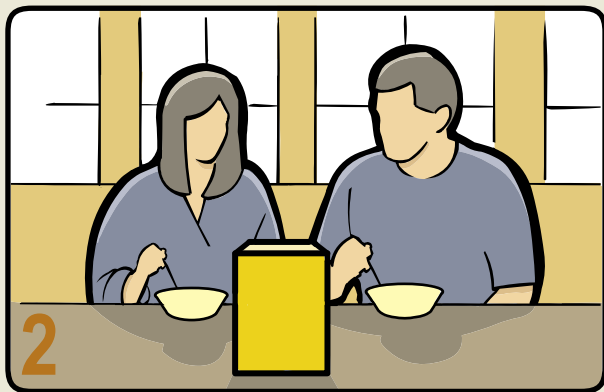
Our integrated approach to Shopper Insights has allowed us to identify 5 commonly held beliefs of shopping behavior that fail to materialize beyond mere assumptions.

Here are The Hartman Group's perspective on these 5 myths of shopping behavior.



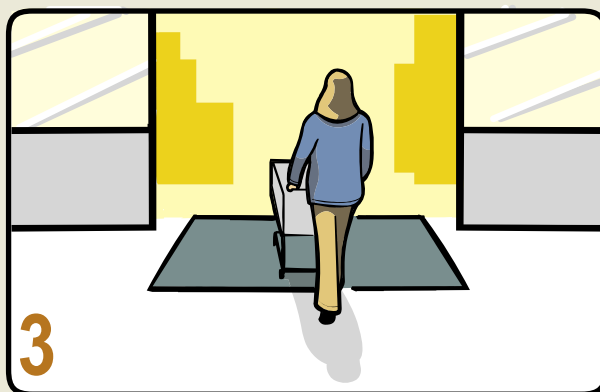
### MYTH: BRAND LOYALTY DRIVES SHOPPING BEHAVIOR

**Reality:** Brand loyalty falls to the wayside for the sake of getting things done: "What can I get at this store to accomplish x, y and z tasks?"



### MYTH: RETAIL ENVIRONMENTS BUILD BRAND LOYALTY

**Reality:** Retail is not the site for brand building for traditional CPG brands. For these established brands, loyalty is formed mainly in the household.



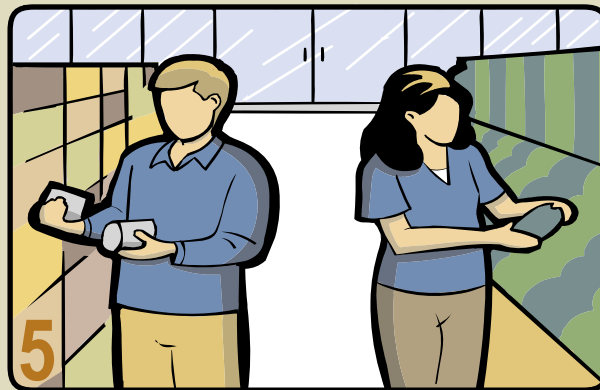
### MYTH: BEHAVIORAL SCRIPTS DRIVE SHOPPING BEHAVIOR

**Reality:** Because most FDM retail shopping is less about identity cues, behavioral scripts take a backseat to "cultural occasions."



### MYTH: SHOPPING BEHAVIOR IS ABOUT FULFILLING FIXED NEEDS

**Reality:** "Cultural occasions" drive shopping behavior. Products and brands are tools to complete occasion-specific tasks, not drivers of shopping experience.



### MYTH: SHOPPING BEHAVIOR VARIES BY CATEGORY

**Reality:** Consumers shop differently depending upon distinctions of "packaged" vs. "fresh," rather than the structure of common grocery and drug categories.

car. And thinking about brands is almost never the first thing that happens—even for shoppers who exhibit measureable brand loyalty. Shopping occasions associate themselves with specific kinds of tasks, some of which may not actually occur to them until they enter the store. On the surface, these tasks may seem related simply to product inventory management (i.e., “We’re out of \_\_\_\_, at home, so let’s replenish our stock”), but they aren’t always. Shoppers don’t think, solely, about replenishing depleted volumes of brand x or product y. They think about getting items that get specific at-home tasks accomplished—whether or not this leads to replenishment or product switching. These tasks are eminently cultural in that they relate to broad, collective orientations to a whole host of everyday behaviors (e.g., child care, feeding the family, throwing a dinner party, cleaning the home, personal grooming, enjoying road trips, etc.). These shopping tasks may range from the more serious (making sure everyone gets dinner tonight) to the more indulgent (exploring the finer side of body care). On some occasions, shopping itself is the primary task, because the occasion for shopping is entirely recreational (i.e., with few targeted goals of any kind). The specific tasks shoppers think about on a given shopping occasion depend on what we will soon define as the “cultural occasion” for shopping. It is this swirl of tasks driving a specific cultural occasion, not brand loyalty, that truly drive shopping behavior.

Compared to consumer domains such as retail fashion or home furnishings, where consumer brand loyalty is much more likely to drive shopping behavior, including channel selection, we find that consumers in drug and grocery are engaged in more ritualistic cultural behavior (i.e., home provisioning). This, in turn, means that the shopping experience becomes intimately tied to cultural norms governing domestic life (housework, meal preparation, food procurement, child care). While it may be culturally acceptable to indulge one’s personal interests in the domain of fashion or automobiles, grocery and drug shopping is most often about getting things done for an intimate social group, usually the immediate family. Brand loyalty easily falls to the wayside when one’s top priority is “getting things done” to sustain the everyday functioning of the household. Any brand that allows the consumer to continue with his/her shopping in an efficient and economical manner will usually suffice.

## 2. Retail Environments Are Sacred Spaces for Brand Loyalty

MYTH: Retail is an important site of brand-building efforts for traditional CPG brands.

REALITY: Traditional CPG brand orientations and loyalty are formed mainly in the household.

While there is much to learn about consumer behavior within retail environments that may yield crucial insight into how to extend channel penetration or otherwise drive sales, our current evidence suggests retail is not a crucial site of brand-building activities for traditional, established CPG brands (e.g., Frito Lay, Nabisco, Kraft, General Mills, Campbell’s, etc.). Many of these brands are part of our generalized American cultural life, and a smaller number even have enviable transnational cultural equity as symbols of “the good life.”

But, the current cultural equity for these historic brands did not arise in retail environments. The experience of buying Coca-Cola, for example, is not sustaining the enormous symbolic power of the Coca-Cola brand.

Shoppers don’t think, solely, about replenishing depleted volumes of brand x or product y. They think about getting items that get specific at-home tasks accomplished—whether or not this leads to replenishment or product switching.





Instead, it is the numerous, diverse cultural domains in which Americans—and, increasingly, many global citizens—experience Coca-Cola that drive brand loyalty. By interweaving Coca-Cola into the rituals and routines of everyday existence (i.e., beyond the shopping experience), we structure an orientation to brands that often pre-date our existence as adult shoppers. In other words, brand loyalty happens through rituals surrounding use and memories of use.

In fact, one of the more striking findings from our research is that experiences within the home are the key crucible of consumer orientations to traditional CPG brands, most notable among these experiences are the memories of consuming specific brands during pre-adolescence when we, as consumers, were only marginally involved in the shopping experience. While extremely powerful, these formative orienting experiences to traditional brands have the unexpected consequence of “locking in”—or quite literally branding—a highly durable consumer orientation. And research indicates that historical brand orientations formed mainly in the household will likely only transform during consumption experiences within the household. For example, if one’s brand impressions of Nabisco (comforting and trusted) are intimately tied to experiences in the home with Vanilla Wafers as a child, it is only through new experiences in the home with other Nabisco products that brand impressions/expectations are likely to change. Immersive, interactive product experiences with new Nabisco products in retail may surely cause consumers to try new products, but they won’t cause a durable brand switch unless these retail-triggered experimentations lead swiftly to powerful at-home user experiences.

By contrast, our research indicates that “newer” and/or “contemporary” brands have less historically durable connections to consumers’ home life and derive far more of their symbolic hold over consumers through careful channeling. When consumers encounter “new” and “interesting” products (and brands) amid interesting and compelling retail experiences, they are much more likely to attribute some of the magic of that experience to these newer brands. To this end, we find that contemporary brands such as Newman’s Own, Horizon, Odwalla, Amy’s Kitchen, Ben & Jerry’s and even Starbucks have been able to better capitalize on retail for brand-building purposes.

### 3. Behavioral Scripts Drive Shopping Behavior in Mainstream Grocery and Drug Retail

**MYTH:** Consumers shop based on innate “ways of doing” that are learned from parents or peers.

**REALITY:** Shopping behavior is less about identity cues than response to a unique collection of cultural occasions.

As we undertook this study, we at THG hypothesized that behavioral scripts would play a critical role in any explanation of shopper behavior in retail environments. By “behavioral scripts” we are referring to deeply ingrained, tacit “models for action” guiding behavior that otherwise appears habitual or subconscious. Our research in retail environments, however, revealed that behavioral scripts are few and far between in the observable behavior of shoppers within grocery and pharmacy retail.



Why is this so?

We have found that behavioral scripts are present when consumers shop for key symbolic, lifestyle goods—goods whose chief purpose is as much about identity as utility. Automobiles, clothing, houses, furniture—these are all goods that help to tell others a bit about who we are, so it should come as little surprise that when shopping for such products we tend to revert to models of action learned (mostly) from either our parents or from the social peer groups in which we feel we currently have the most at stake in terms of defining who we are. Additionally, the larger the ticket price, the more at stake.

We found clear evidence of this phenomenon when listening to consumer narratives of how to purchase a car. Some firmly believe in making a dealer one well-researched offer and then refusing to “dicker.” Others avoid dealers altogether and only rely on brokerage services such as Costco. Still others prefer to purchase a car the old-fashioned way with an afternoon of back-and-forth negotiating—the point is that each represents some version of a behavioral script, with significant effects on the shopping routines.

Quite to the contrary of the case for automobiles or fashion, our research indicates that most grocery, drug and mass retail shopping behavior is less about signaling identity cues than it is a unique collection of cultural occasions, occasions variously linked to notions of home provisioning, home life and social life. Here behavioral scripts take a backseat to culturally mediated shopping occasions such as “weekly shopping” “the after-work supplement” or “the coffee shop experience.” Based on the strength of these observations, this report will be structured primarily around 12 such cultural shopping occasions.

#### 4. Shopping Behavior is About Consumers Fulfilling Their Fixed Needs

MYTH: Consumers have innate, predictable needs that drive behavior.

REALITY: Cultural occasions drive shopping behavior.

Many analysts of retail behavior frequently refer to “need states” and “drivers” in their analyses of shopping behavior. Typically, these “needs” are framed as objective, rational means-to-an-end forces that drive or initiate shopping behavior in a straightforward fashion, regardless of the shopping occasion. Not coincidentally, consumers themselves often suggest that their shopping experiences begin with some variant of the question: “What do I need to get right now?” And talk of retailers “fulfilling needs” by connecting consumers with products is surely seductive to clients. Who among us, after all, doesn’t prefer to relish in the comfort of an orderly worldview that explains human behavior with an only slightly more elaborate version of “I scratched my arm because it itched.” Unfortunately, as our data indicate, the story is just not that simple.

While social and cultural forces aren’t necessarily rational at all, they do generate context-specific tasks that require completion. And it is these resulting tasks that are often confused as rational needs. In addition, specific shopping occasions trigger different social and emotional orientations that affect shoppers’ tendency

Who among us, after all, doesn’t prefer to relish in the comfort of an orderly worldview that explains human behavior with an only slightly more elaborate version of “I scratched my arm because it itched.” Unfortunately, as our data indicate, the story is just not that simple.



to buy certain kinds of impulse items, regardless of the channel they choose to shop in.

For example, let's think about one of the most universal of human behaviors: parenting. It happens in all cultures, despite its many different permutations. One way of looking at shopping behavior among parents is to assume that a parent has certain shopping needs in accordance with how she chooses to raise her children. But do parents really shop for their children the same way all the time, as this line of thinking might imply for most marketers? Is even the most concerned parent always that consistent? We don't believe so.

We've met numerous mothers over the years who exhibit higher wellness standards at home than when they are purchasing food for their children beyond the home. At home, for dinner, their children "need" organic dairy and fresh fruits and vegetables all the time—no exceptions. She may also have her children bring this kind of food to school as well. This kind of mother will tell you she needs these kinds of grocery products to be a "good Mom" (as she defines it). But the marketing mistake would be to assume that whenever she buys food for her children, she operates under the sway of this "need for organics." In reality, we've met moms like this who will "allow" their children some McDonald's food on a harried road trip. They will also let them buy Pringles at the grocery store after a big soccer game, because a little conventional stuff isn't going to kill them and "Sammy deserves a reward." On some occasions, Mom shelves her "need for organics," and on other occasions, such as her weekly trip to Albertsons, she finds it more appropriate to shop with her children's long-term health in mind (since these trips provide them with the bulk of their calories every week).

What we've learned from moms like this is that the cultural occasion for shopping influences what needs become paramount, even when the shopper is shopping for the same group of people (i.e., her kids). When we approach our understanding of the shopper experience from within a specific, culturally shaped occasion, we see that the products and the brands that appear along the way are really *tools* to complete occasion-specific tasks and not *drivers* within the shopping experience itself.

For the purposes of this study, we define "cultural occasions for shopping" as follows:

**Cultural occasions for shopping are those occasions in which the motivations for the shopping, the intended beneficiaries of the shopping and the push/pull forces shaping the shopping journey connect to shared orientations, preferences and, to some extent, value systems that transcend crude demographic categories.**

A collective orientation to shopping occasions may not be something we are all aware of as we shop; though, with a little prompting, we can easily understand how the simple question "What do I need to get right now?" morphs significantly depending on where, when and on behalf of whom we ask it.



## 5. Shopping Behavior Varies Significantly by Category: The Evolving Case for Fresh

MYTH: Consumers shop differently depending upon the retail category.

REALITY: Consumers shop differently depending upon distinctions of packaged and fresh.

One of the long-standing, implicit assumptions among analysts in retail, drug and grocery is that consumer shopping behavior varies in meaningful ways across grocery categories such as “frozen,” “snacks,” “canned goods,” “dairy,” “OTC,” “cereals” or “beverages.” Common wisdom holds that consumers shop differently in the nutritional supplement category than they do a category such as beverages. There are certain features of category X, analysts tell us, that cause consumers to orient themselves differently to the shopping experience, thus affecting behavior in significant and predictable ways. In fact, we find little support for this assumption given the way categories have traditionally been construed.

First, we find that the common grocery and drug categories around which analysts, retailers and manufacturers have structured their business remain largely industry categories. That is, these categories comprise a taxonomy that has more to do with organizing work processes into a logical, comprehensible framework for operations managers in retail than it does facilitating consumer shopping behavior in any intuitive manner.

This is not to suggest that consumers do not believe cookies should be located in one area, cold remedies in another and cereal in yet another, or that frozen products should not be centrally located in a single aisle. Quite to the contrary, consumers, too, prefer to work within familiar frameworks, with most having long since adapted to this the dominant (though arbitrary) taxonomy in grocery and drug retailing. But as a result, we believe such category distinctions function largely as navigational aids (ways of knowing where to find things) and fail to figure prominently in critical explanations of consumer shopping behavior.

For consumer behavior to vary in meaningful pattern or orientation, we must be concerned with distinctions that are relevant, clearly understood and resonate with a wide swath of the consuming public, which is another way of suggesting we should be concerned with authentic cultural distinctions. Conventional categories comprising grocery and drug retail were arbitrarily imposed upon the consuming public from above, the product of well-meaning retail managers. And while we can all learn to live within this world, it simply doesn't resonate with our intuitive way of life.

The single most salient cultural distinction currently driving consumer behavior in grocery and drug—a distinction that affects every retail channel—is the distinction between “packaged” and “fresh.”

### Packaged vs. Fresh

Packaged and processed foods rose to prominence during the mid to latter half of the 20<sup>th</sup> century.

Attempting to deliver on modernity's great promise of convenience, reliability and, most notably, affordability, manufacturers skillfully engineered packaged and processed versions (frozen, packaged, dehydrated, dried,

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canned, preserved, pre-cooked etc.) of what were traditionally known simply as “foods” to meet the needs of a post-war, mass-market consumer audience. While consumers responded (more or less) in kind, the unexpected byproduct of these developments was that such foods became symbolically linked to the very logics that made their convenience possible—predictability, uniformity, homogeneity and the like.

Jumping forward 40 to 50 years, we observe a single, overarching theme encompassing the vast cultural shift in the food world. Namely, the pursuit of all things real—expressed here primarily through cultural distinctions of “fresh.” Aware as we have become of the (perceived) mediocrity and/or predictability of processed or packaged products, consumers consistently turn to so-called “fresh” counterparts in pursuit of a healthier, tastier, more interesting or more distinguished way of life. This does not mean consumers have abandoned processed or packaged foods, merely that (a) they see the distinction between packaged/processed and fresh as the most salient cultural distinction in the food world, that (b) such distinctions are often seen as indicators of quality, healthfulness and taste, and that (c) such a distinction often affects consumer shopping behavior in critical directions.

It is important to understand that fresh is not so much an objective distinction (as in the difference between fresh fruit and canned fruit) as it is a multi-faceted framing device that allows consumers to differentiate between the real and the imitation, the raw and the processed, the tasty and the bland, the ripe and the stale, the good and the bad, the fancy and plain, and so forth. Consumers are attracted to fresh products for a variety of reasons (taste, quality, healthfulness, status, ideology etc.), all attributable to the fact that the product in question is not “one of those products,” the processed or packaged versions of the “real thing,” thrust upon us by our monolithic, industrial food production system.

Likewise, the cues that signal “fresh” to consumers may often have little to do with objective understandings of fresh. Our research suggests, for example, that the most important “fresh” cues for consumers usually have much, much more to do with the product’s packaging, refrigeration and location within the store than, say, the taste or texture of the product. To cite but one example, we found that consumer interest in, as well as taste impressions of, certain juice brands rose considerably merely by moving the juices (and their accompanying stand-alone cooler) from dairy to produce. There is simply something about encountering juices in the produce department that makes them seem fresher—and, by proxy, tastier and healthier.

***Important cues signaling fresh: packaging, refrigeration and the evolution toward the perimeter—with a resulting decline in center store***

For grocery and supercenter shoppers, the most salient cues of “fresh” relate to packaging, chilled status and product location, all of which combine to make the perimeter of the store “hallowed ground” for fresh.

First, we know that consumers perceive products with minimal to no packaging to generally be “the freshest.” If significant packaging is a must, the next best option is clear or see-through packaging. While consumers no longer perceive these products as fresh per se, they suggest heightened fresh perceptions



based on their ability to visually inspect and “see” the product.

Second, we find that products in refrigerated sections always score high marks in terms of freshness perceptions, the operative logic being that refrigerated areas are reserved for the most perishable of products—those products that don’t adapt well to freezing and are too fragile to merely display on the store floor (such as cheese). Research here, for example, indicates that consumers think shelf-stable soymilks displayed in refrigerated cases to be “significantly fresher” and “higher in quality” than their identical counterparts in non-refrigerated center store.

Finally, we believe the historical tendency in grocery retail to locate key “fresh” departments (e.g., dairy, meat, seafood, bakery) on the perimeter of the store (ostensibly because the physical connections to “backstage” areas made them easier to staff and service) has also had a lasting effect on consumers’ shopping habits. As irrational as it may seem, fresh-interested consumers accustomed to floating around the perimeter of the store to patronize departments such as meats and seafood now tend to ascribe higher freshness perceptions to products located in these areas, regardless of the objective reality. Of course, location alone is not sufficient to drive markedly higher fresh perceptions. Simply locating packaged cookies on an end-cap near the bakery will do little to drive fresh perceptions. On the other hand, our evidence suggests that additional fresh cues in the form of (a) repackaging these same cookies in a clear plastic container and (b) building a display of the resulting containers on a table next to store-baked cookies will drive fresh perceptions considerably.

When we combine the historical features of grocery retail (described above) with more recent consumer preoccupations with fresh, and factor in the reflective effect of contemporary retail responses to this trend, we find powerful evidence that the grocery perimeter has become a “sacred space” for products in search of heightened quality, health and taste perceptions—all operating through consumer ideas of fresh. This, we believe, is likewise responsible for the powerful, and we believe permanent, migration of consumers away from center store toward the perimeter of most food-based retail channels.

## Conclusion

It is within this framework, then, that our “Shopper Insights” should be viewed. We are extremely excited by the rich texture of our findings and how, in the upcoming report, we connect actionable tactics—both in-store and at-home—to effect consumer shopping behavior. We have approached “shopping” from a truly consumer perspective and because of it we have uncovered the consumer view of the “world”—not what we, as researchers, think they are experiencing.

Here, The Hartman Group has developed an innovative and productive vantage point in uncovering, understanding and developing “the rules of the road” with regard to “Shopper Insights.”





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