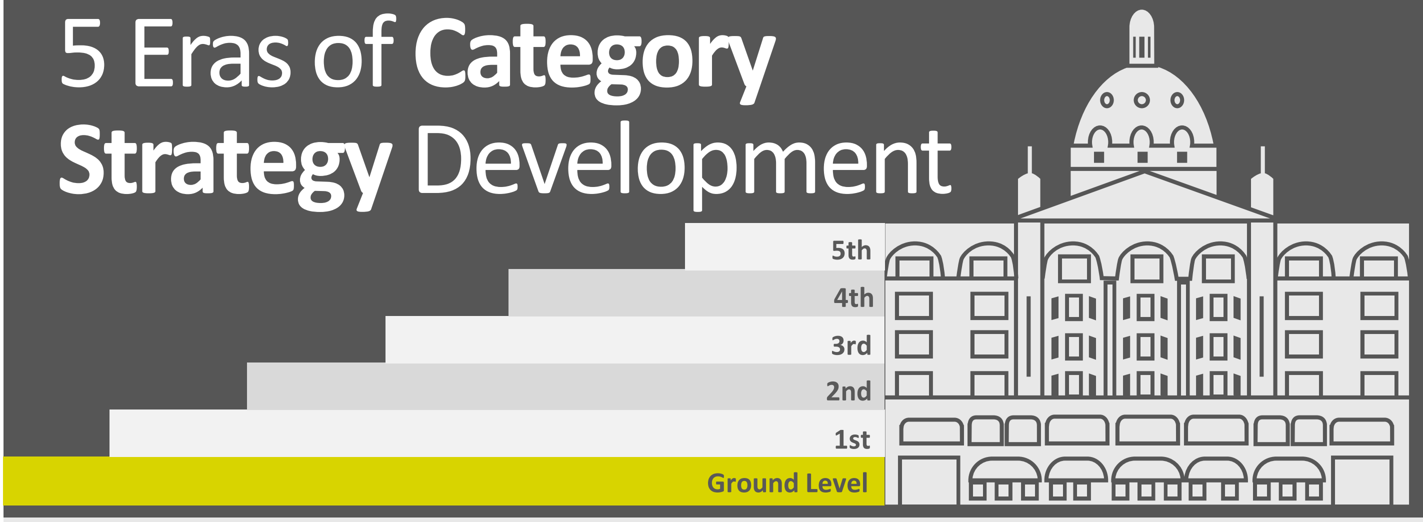
5 Eras of **Category Strategy** Development



Ground Level

Seeking Clarity of Purpose

Back in the late 1990s, Category Strategy principles were essentially new to the UK FMCG sector. The lessons learnt from that era on how to embed new strategic thinking are still relevant today. There are similar pitfalls from not keeping things simple with language and terminology, and from not being clear on purpose. With the building above as my structure with 5 floors, the ‘ground level’ must be laid first.

From my Unilever experience back in 2000-2002, this new ‘Category stuff’ had a reputation of being “a bit complicated.” Arguably, some consultants appointed from up-high, benefited from that perception, painting a promised land of how suppliers worked with Walmart US with positive influence, and what ‘could be’ in the UK and Europe. The good spirited joke was to see which consultant would leave the heaviest lever-arch file of content, to be weighed on scales (to then sometimes be shelved).

On reflection some foundations were not in place, and the purpose of ‘Category’ wasn’t clear to many.

- The ***External*** lens of Cat Strat and Cat Man wasn’t stressed enough. In corporate giants like Unilever with multiple brands, the term ‘Category’ meant managing the *internal* operations and commercials for a brand portfolio within a category. (Job roles like MS&P, CS&P and RGM didn’t exist). So it was: “Let’s give this new *external* category role to the category team – it’s all ‘category’ isn’t it?” But when internal profit targets clashed with growing a retailer’s category RSV, it wasn’t the same at all.
- The distinction between shopper and consumer*wasn’t in place (Gifting categories aside, maybe…)
- Within a supplier’s central Innovation teams, there were blind spots on Category growth, retailer incrementality, and shoppers vs. consumers again. I came from that innovation world (R&D, then marketing) in an unusual career jump, so I had a rare vantage point to see this glaring gap.
- Category data was “shonky”, as a reflection of the Grocery market consolidating. “Look the Category has grown 10% by EPOS!” Actually, no, some sales have just shifted from distributive convenience into the ‘national account’ EPOS universe. And Kantar-type panel data was often used with little scrutiny on where it was robust, and where it wasn’t, creating a backlash of suspicion in some areas, or unwarranted disengagement for smaller value, low frequency categories that were “directional.”

For these reasons and more, I saw limited Category Strategy work actually shared with retailers in a structured way. So, I don’t consider this time period as a 1st Era proper. But things would get better, building from a more robust ground level…

** Early US work with supplier-based category and range management, linked to supply chain efficiency was termed “efficient consumer response”, yet the shopper (who may not be the consumer, or is at least a consumer in shopper mindset) makes the purchase decision.*

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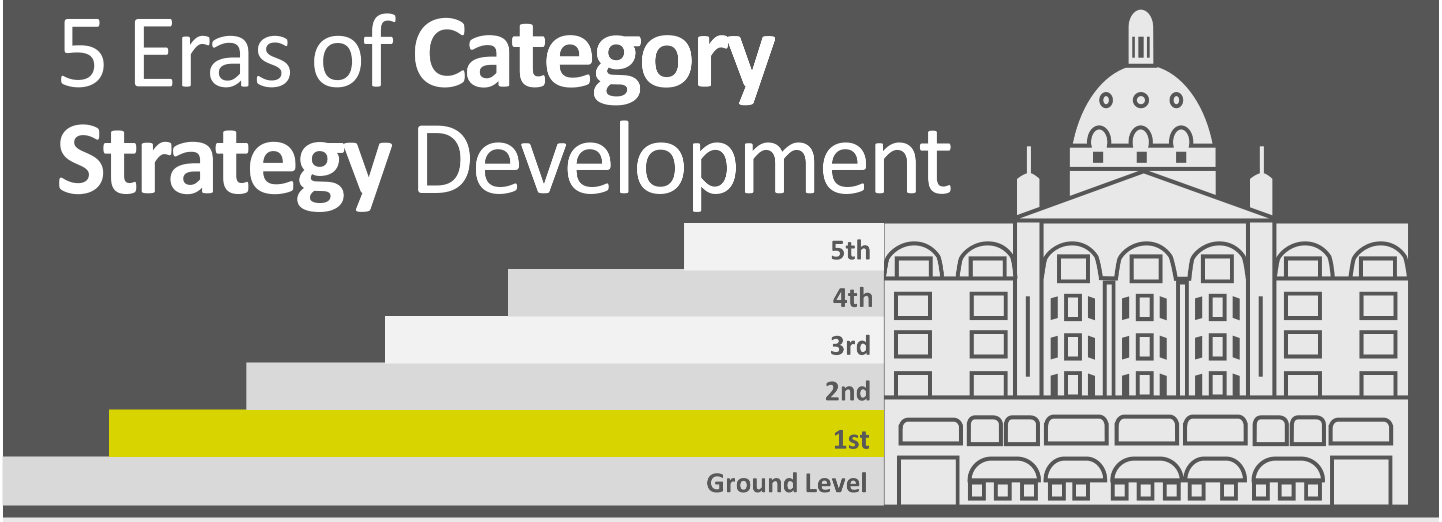

1st Era

External Purpose, but not SMART

From around 2002, with lessons learnt from abortive attempts to embed Category thinking into FMCG, I experienced the positive impact of Insight teams and consultants. Some embers were re-lit, as was timely with data improving, and more retailer consolidation.

- **Shopper Metrics**. There was a moment I realised that growing a category was simply “Getting more shoppers, to spend more, more often” in simple language. And that Kantar panel data, or emerging retailer loyalty data, could track these “MECE” metrics*, within a category, and within a retailer. I then “got” Category as a career - an objective, retail advisory discipline, with a framework for shopper-based market growth: 6Ps, range, layout, innovation, PTP, activation, perfect store, etc.

- **Category Growth Drivers** – Getting one’s house in order. With the external Category lens now clear, to some converts at least, it was time to scrutinize some Cat Strats and say “That driver is actually internal, isn’t it? It’s overtly, or covertly, driven by our factory, people capability or brand strengths.” So, quite rightly Category Strategies were overhauled and sharpened up to be retail-facing with reduced back-engineering. My agency, *JB Communications*, were a leading player in landing such strategies with impact. This was the start of having 6 or so Growth drivers, with catchy titles based on shopper or consumer behaviour, often displayed in a ‘Category Wheel’ or a retail facing ‘House.’ The principle of “Less is More” is still something we push at JB with 3 to 6 drivers maximum, and objectivity built on macro or megatrends, often with headwinds & tailwinds. This is where JB still start Category Strategy presentations today with credible hearts and minds engagement.

- **What and How?** The foundations of “What” it meant to drive external category growth were set, but without SMART objectives (Specific, Measurable, Achievable, Relevant and Timely), things would often stall before the tactical “How.” One critical miss-fire in this era was on the Achievable ‘A’ of SMART. Internally, it was like a game of ‘Top Trumps’ on which category had the highest value £SOP (Size of Prize). Toppy cash targets were tolerated as not being achievable when framed within 5 year time horizons (“I won’t be in role by then” was thought, if not articulated; plus an attitude of ‘aim for the stars to hit the moon’). But beyond having good structure and an elevator speech with corporate USPs, some cracks were showing. Retail buyers could only ‘big up’ their own category’s growth potentials so much in their internal fight for focus, before they (and you) were not credible with perennial “jam tomorrow.” Projected trends had to be backed by EPOS- ‘rear-view mirror’ sales from sub-categories, brands and SKUs, with switching and ‘leaky bucket’ realities included.
  - Then the 2008 recession hit. It was time for Category to sharpen its pencil on the ‘How.’

** MECE = Mutually Exclusive and Completely Exhaustive. A principle that a sum of the parts must equal the whole opportunity, though inherent trade-offs exist as shopper growth metrics are not independent variables*

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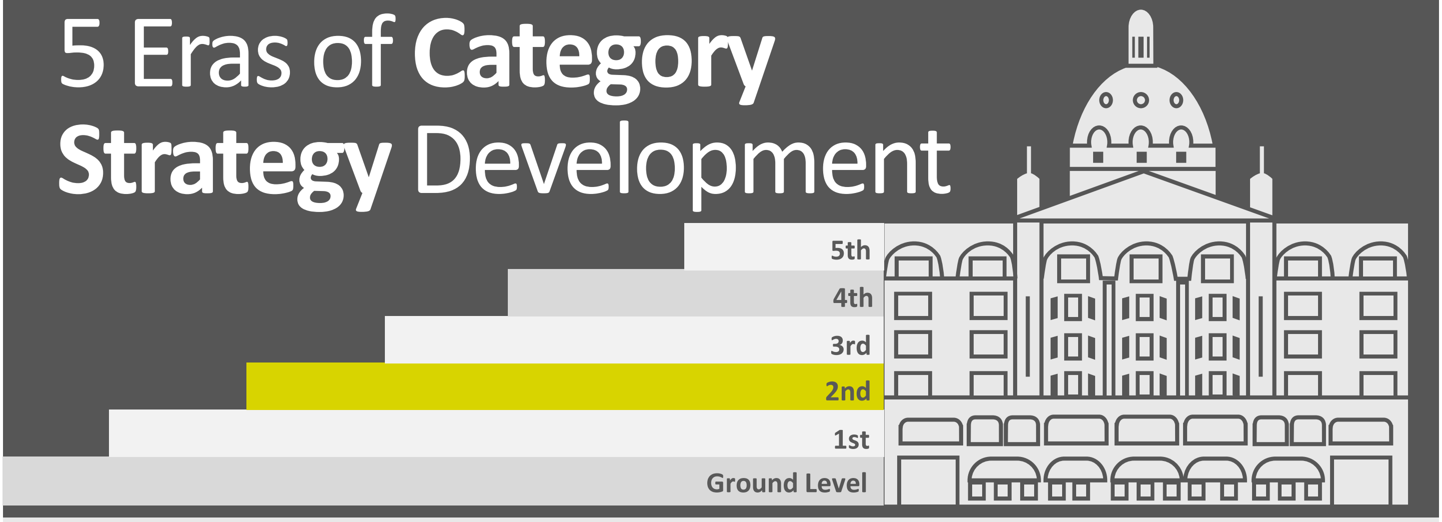

2nd Era

Putting the ART into SMART

The aftermath of the 2008 Global recession changed things for the better in the long run for Category Strategy Development and its implementation in Category Management. But it was a painful re-adjustment. It was the first major recession since Cat Strat and Cat Man disciplines had really been embedded in UK FMCG. It shone an unflattering light on unrealistic targets and non-scalable actions.

An Economic Aside: During recessions, particularly inflationary periods, supplier Category focus and retailer 'will' for collaborative projects can go on the back burner. This is a consequence of cyclical economics, but not a fundamental of Cat Strat evolution. With limited resource, particularly in sales teams, it is understandable that a business focuses on 'value growth' from driving cost-price increases in such times. But if that value growth is only in line with inflation, then the result is purely a reflection of currency dilution; an avoided negative, but no real growth at all. For those who are bold with resource to keep category projects alive during recessions, if you can understand and deliver even minor real growth, you will be quick out of the starting blocks when the economy improves. You will also likely have competitive edge from strong non-commercial relationships with your retail customers, when fractious sales negotiations may have weakened relations via your account teams.

- **A**chievability: So, growth targets became more realistic, with category declines experienced, and lower shopper disposal incomes in the spotlight. Some positives came out of this:
  - Honest expectations when a "beat the fade" reduced decline was the best to expect over three years - "So what are the higher level offsets within our joint portfolios for growth?"
  - "This growth driver isn't realistic to scale up, is it?" Fine in a flagship store for some PR, but some commercial rollouts weren't cost viable, e.g. sampling or demos, needing store staff.
  - We can't rely so much on Trade-up strategies from "soft" premium product innovations with weak RTBs that don't convince shoppers. What do we do about this collision of austerity, ecommerce and media fragmentation to protect and grow the core?
  - More scrutiny on the monetisation of Cat Strats meant better choices. Until then sometimes Cat Strats grouped every possible tactic under the drivers. There was still a comms benefit to structure, but: Where did the £ big bets lie? Which drivers were overstated? Can we be more *single minded*? Sometimes facts were ignored that penetration gains will reduce AWOP from lighter shoppers, or more range breadth will reduce ROS per point of CWD. [(1)] Make a choice!

- **R**elevant and **T**imely – with less tolerance on 3 year plus projects, there was more focus on 'low hanging fruit', where shopper marketing activations could be executed with a lead brand's strength. This provided category growth 'proof points', without reliance on NPD launches and marketing.

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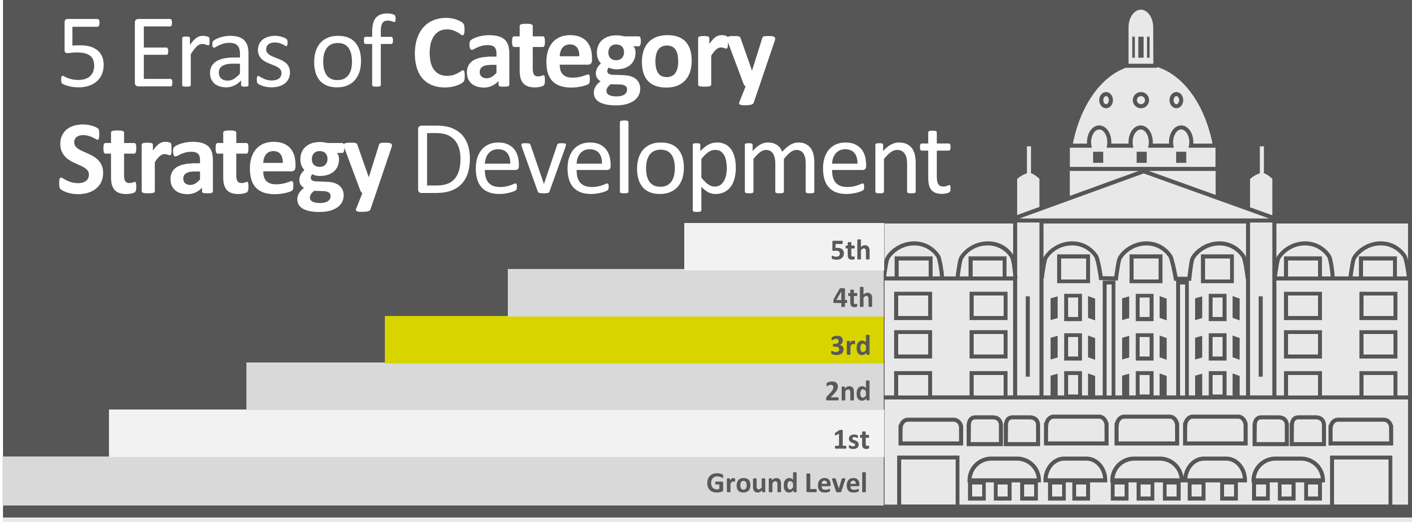

3rd Era

SMARTER. But with Overshoots and False Economies.

There is often a lag effect with the human condition when it comes to accepting difficult change. But by 2011 or so it was clear that the impacts of 2008-10 were not a collection of reversible blips. The core grocers accepted that the discounter sector finally had a UK foothold, so ongoing pressure on margins and organic growth was clear (acquisitional growth had stalled some time earlier). Retailers now really needed suppliers to invest resource and funds to help drive their growth. And even the Global branded suppliers with the biggest budgets couldn't say "We have this product relaunch with big media and the primetime "Corrie" TV ad spot. Category growth will be fine..." Even the most purist brand managers and innovators realised they had to consider category, retail, and own label, beyond a tick box. So, it was time to lean in, shift some TV spend to Shopper and new Digital media, and to resource some big category projects for actionable thought-leadership. At the same time, some things had to be cut from supplier budgets in parallel. Some good savings efficiencies, and some false economies followed...

- Suppliers engaged with retailers on very broad category projects (e.g. I was working on consumer healthcare and engaged on total Health Baby Beauty Toiletry Wellness reinventions. This got as broad as including healthy 'pick and mix' nuts. Here was an over-shoot example). 'Some' broad consultancy is good, but there is finite resource to drive viable end-game actions in any business.

- Suppliers chose not to play the Category card where it was of low value and low value to the retailer, even if high value internally. That made sense for external focus, yes? Maybe. But consider a small category may be less competitive and more growable; the responsible junior retail buyer may rise the ranks and remember your support, long term. A greater waste of investment of time and cash can arise from buying *significantly non-aligned* category data. Stretched retailer buyers need one version of the truth – e.g. deodorant or shower gel data that includes male toiletries under the remit of another buyer isn't so useful; antidiarrheals not including growing oral rehydration products, or NRT excluding e-cigs, could all be wasteful, timely and annoying to align figures to the buyer's remit.
  - There was also false economy in saving budget by reduced EPOS data frequency. By the time a retail-facing meeting had been rescheduled three times, the 12 w/e dip could be obsolete, especially post range review. Lesson: be 'in' or 'out' for a given category and reduce stress!

- With the **Channel Shift** to ecommerce accelerated, working smarter also meant re-aligning resource and focus. I have a proven model to predict future channel mixes. Do get in touch for any support.

- Often a savvy broader cost saving, was less resource-consuming 'tinkering' with product variants and renovations that wouldn't grow categories, or do much for the brand. Internal supplier efficiency, or retailer push backs did help 'Big Bet' priorities. But smarter work needed more collaboration:

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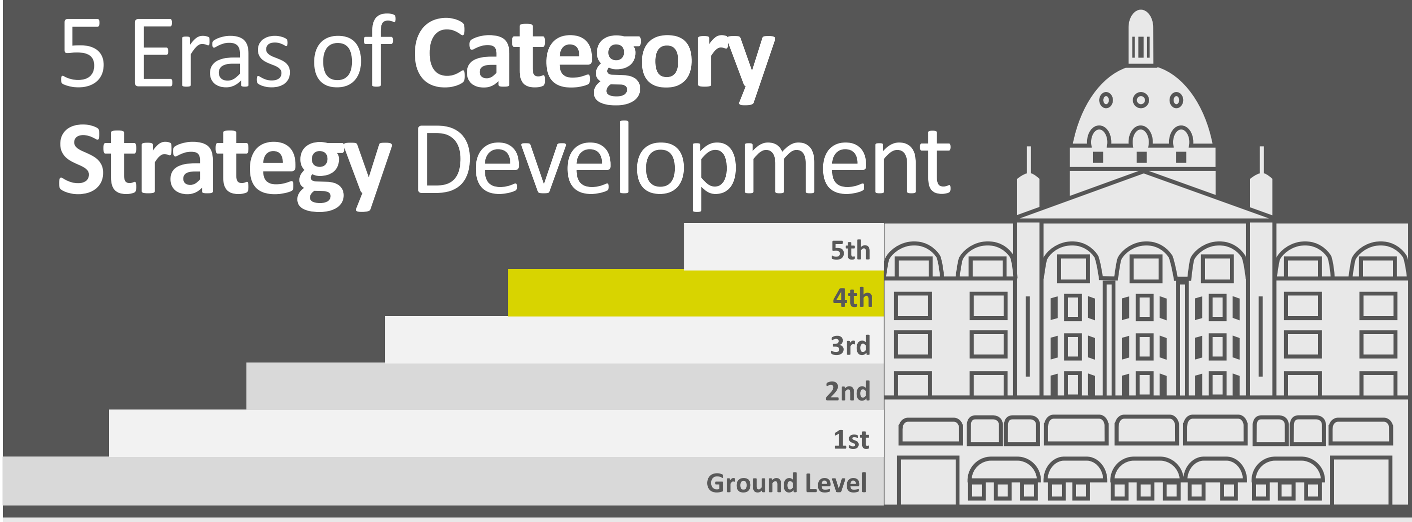


4th Era

Getting more Connected: Clarity on Roles To Help Your Goals

Both suppliers and retailers increasingly needed a return on their Category projects, data, research & merchandising investments. Focus was needed on cross-functional and supplier-retailer collaboration. From my vantage, after moving to consultancy, the need for impactful messaging was clear to stop good works not being leveraged, even within a given company. For 'Big Bets' the efficiency of using multi-media comms experts like JB, and using Customer Centres for impact, became clearer. This was before agile 'pivots' were needed in the face of the 2020 pandemic. Below and overleaf is a list of areas that I view as 4th Era capabilities, for you to review and self-evaluate. Your scores out of 10?

- **Range and tail-management from the retailer lens**. Advising retailers on managing (delisting some) lower quartile ROS lines. And internally getting your SKUs out of that danger zone, e.g. driving promo trial for win-wins on new lines. Surely this is a 1st Era fundamental of Cat Man? It depends. If you have worked on big power brands, your supply chains also have power to reduce complexity. Internal factory hurdle rates can apply pressure to delist lines that a retailer wants to keep. That is a nice problem to have from the vantage point of a start-up, or in a developing category trying to hit a 12w ROS target (if a retailer even gives you that long to build trial & repeat). But *all* suppliers should know the retailer's tail. Tip: Alignment with account teams so ROS per point of CWD translates into 'cases per store per week' can still be a language barrier today between Cat Man and Sales.

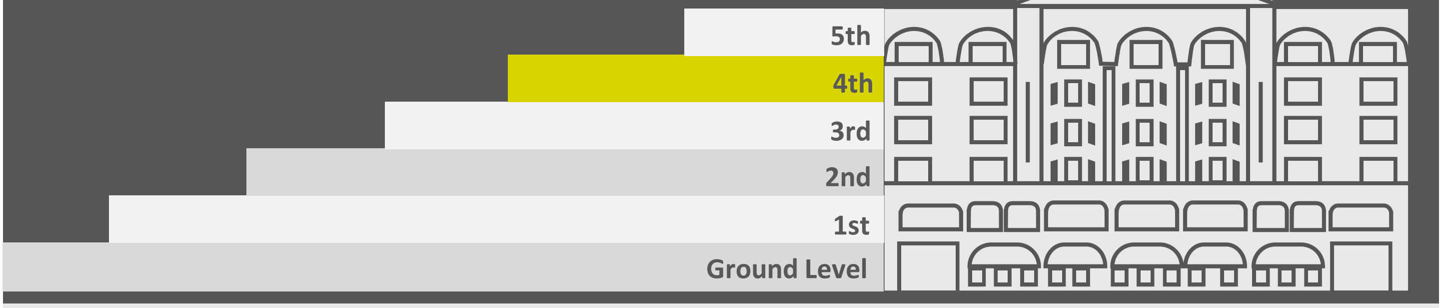
- **Inbound Insight from a Cat Stat?** The main focus of a Cat Strat on a two year timescale should be 'outbound' from supplier to retailer. But as a supplier, are you losing a critical source of insight where your retail buyers and contacts can feed into your innovation pipeline? In two years (likely for a big corporate), or shorter timescales for more nimble suppliers, you can then land innovations to deliver against unmet needs or white spaces. Joint growth you would not have otherwise enjoyed.

- **WHAT IS YOUR BRANDS' CATEGORY ROLE?** Such a big question I show in CAPITALS. Let's consider a case where you identify a key category growth driver to get shopper penetration, and you advise the retailer - great. But are the brands or products your company sells the best to do this? It could be they are better suited to drive trade-up or trade-across, from shoppers who have already traded in. (Dunnhumby or other loyalty card 'customer journeys' could reveal this). Do clarify your key role to a retailer - it could mean you have more influence than your share of market would warrant.

  Vice versa, as a supplier, you should be assessing which retailers can help most to grow the category, considering shopper profiles and the retailer relationship 'will'. Don't leave it just to the account teams, or to chance, to see which driver tactics stick with which retailer.

- **With clear roles, achieve your goals.** Hit the sweet spots in the supplier-retailer category matrix.

5 Eras of **Category Strategy** Development



4th Era (continued)

Connectivity & Collaboration starts in your own company with the cross-functional 'weave'.

- **Developing a Category Strategy Internally.** Building on the learnings of these 4 Eras, but always centred on *Objectivity*, the main 3-stage process I run is: (1) Get cross-functional stakeholders in a room to think Category –anyone mentioning your own brand goes without a snack (I have done this as 'tough love'!). Get your SMMMART* Drivers ; (2) Then consider your own sub-sector (e.g. format or premium') and your internal brand 'So Whats?' ; (3) Then consider key brand roles and key retailer roles for the category. *Only then* should you get into retail tailoring with your account teams with vital understand needed to overlap your strategy with your customers. Chose the focus drivers.

- **Integrated Category and Shopper Insight Teams?** Personally, as one of a fairly select group who have led both Category *and* Shopper Insight functions, it pains me when I see bespoke shopper insight not integrated into local category teams. Consider that most branded suppliers take EPOS and Panel data to retailers. Your ad-hoc insight (Quant or Qual) is your *differentiator*. It's also a two-way street - Insight teams need to know Category needs, and critically you must get them involved in the question to have 'skin in the game' before answers are delivered. A 'Path to Purchase' framework is ideal to connect Category, Shopper *and* Consumer Insight. Please get in touch to explore examples.

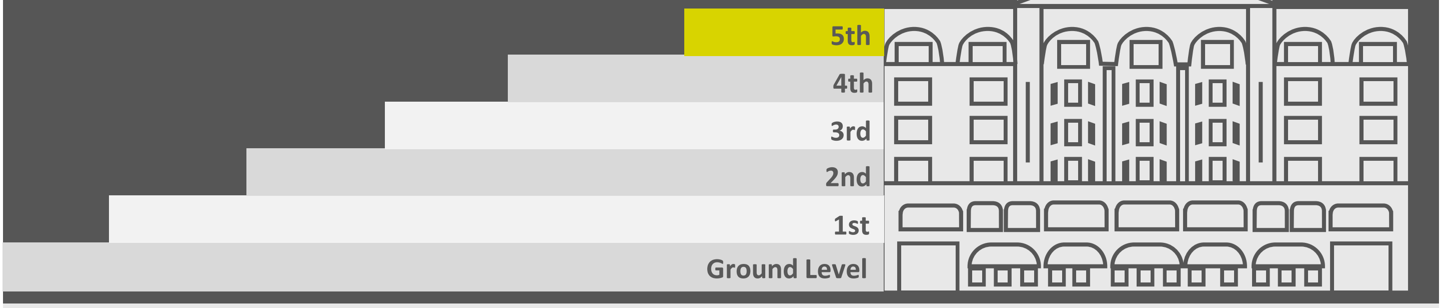
- **'Perfect Store', Ranging and Merchandising, 'Category Captaincy'.[2]** All of these involve getting the right product portfolio in the right channel and store type. If you aren't lined up within your business, linked to a Category and Channel Strategy, how can you hope to deliver externally or get Category Captaincies? Examples of not being connected: (i) Account team-based R&M shelf plans are created in isolation from Category. (ii) Perfect Store programs only focus on your own company's lines with no focus on the Retailer Category win. A *good example* of brand-category-account 'weave' may be format *and* brand blocked hybrid shelf layouts – solutions that provide ease of shop in the category.

- **Integrated JBPs and customer marketing plans** – It is fine and inevitable that some account specific plans and activations will not be linked to Category Growth drivers – some may be pure commercial, unashamedly focused on brand share steal, or account specific, pragmatically non-aligned. But when relevant drivers are not implemented, the ability to 'Plan, Do and Review' with company scale is lost, and often so is central Category resource to help lift and shift winning approaches to other retailers.

- **Category & Shopper is embedded in your business.** Cross-functional alignment is key, and hard won in a big company. As a Category professional, be clear your business wants 'Winning Objectivity' from you: grow the category, but set up your business to benefit disproportionately and hit cash targets. Same for the retailer that you advise who wants to grow their market share. Learn to double think.

**SMMMART – Adding an M for 'Memorable and an M for MECE; to SMART Objectives. A Driver called "New Shoppers" is less memorable, and specific versus say "Convert the Curious" from a recent example I worked on.*

5 Eras of **Category Strategy** Development



5th Era (from now)

From Sustainable Growth to Sustainable Growth

- **Groundhog Day.** The parallels with the 'Ground Level' Era are striking, with current struggles to embed new ecological thinking and purpose. For many years 'sustainable profitable growth' purely meant Y-o-Y financial growth, without any reference to environmental constraints or the finite resources of Planet Earth. The two meanings of sustainability must now intertwine. (Old thinking on 5 Year Cat Strat growth was usually flawed on longer time horizons.)* Embedding sustainability into Category Strategy is still in its infancy with commercial inertia, poor data availability, clarity gaps and some 'Greenwashing' history.

- *Economic aside: Sustainability focus, even more than Category focus, can go on the back burner during recessions, especially for premium green products (usually with initial low economies of scale).The omni-crisis of Brexit, Covid and the Cost-of-Living caused such a drag. And less frequent retailer range reviews slowed innovation generally. Some corporate commitments to sustainability targets e.g. PCR packaging, softened with commercial pressure. However, the need for <u>affordable sustainability</u> has been spotlighted to advantage.*

- **Volume Growth and Sustainable Growth?** As shoppers are currently reluctant to pay more for pricier products, and with inflation slowing, fundamental category volume growth is targeted again. Can this be sustainable? Probably only if it involves switching to greener solutions, circular economy models and *de-growth* (yes) of select categories with unchanging poor footprints. Otherwise, more consumption drives more material throughput and can also drive more waste. There is a fundamental mind-shift required to challenge growth itself: growth for whom, and with what consequence of short-termism? That is too big to tackle bottom-up, but your corporate sustainability targets can be at odds with a Cat Strat Growth driver that promotes multi-buy promos of perishable goods, turning precious resources into waste. Commercial pressure often create such contradictions that are ignored. Category can play its part as custodians of objective data. Especially with Eu mandates on CSRD, and DPPs,[3] similar data will unlock progress. A company hitting an eco-target by acquiring a 'green brand', does nothing for the actual eco-footprint of a given category itself. True category tracking will be needed to drive real progress.

- **Global Sustainable Mindsets for Global Players.** The biggest companies in the world are the ones with the most scale for good, to drive material change. And while this thought piece has a UK retail-facing bias, the need for society to thrive *Globally* is implicit. The Doughnut Economics model,[4] acknowledges total societal needs, particularly in the Global South from which much of the raw materials originate to drive growth. Nationally reported GDP growths in the West are often reported, combined with reducing GHG emissions, not highlighting that those reductions are based only on domestic emissions. Responsible businesses and brands should seek to drive growth while reducing the *true* environmental footprints of the products that drive the growth.

A 5% CAGR Volume growth wouldn't have been challenged in an era of growth, but over 100 years that would mean category growth of 132 times! But there are only so many armpits to deodorize, or meal occasions, etc, even with some population growth.

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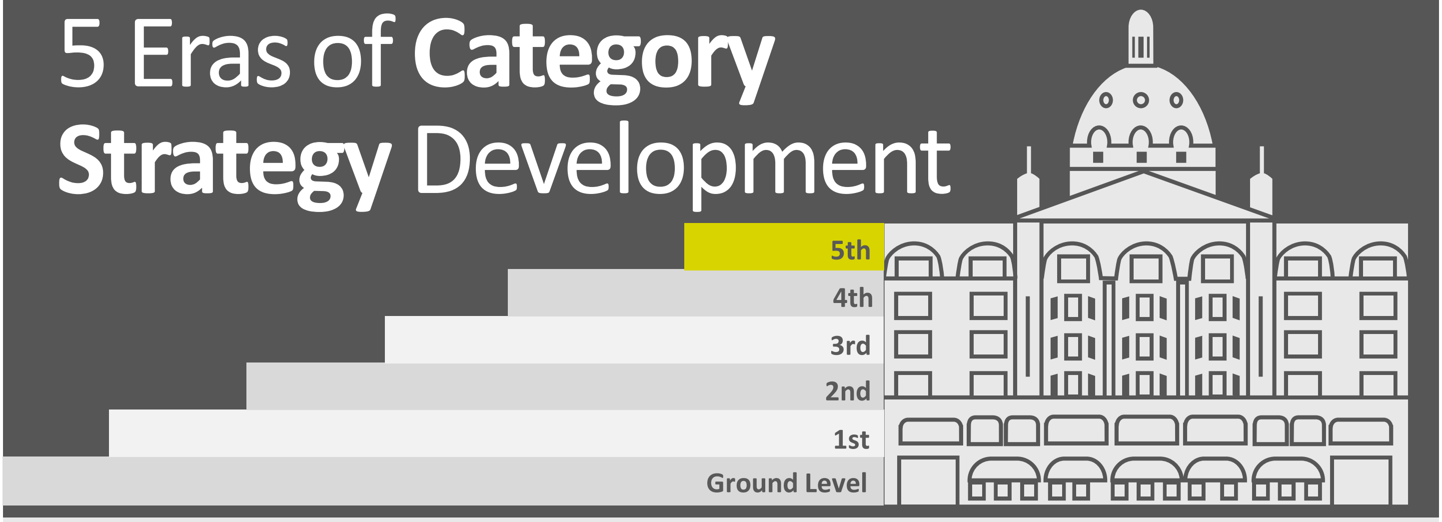


5th Era (from now)

The Quadruple Win

With the current challenges outlined to truly drive Sustainable Category Growth, and the fact that most shoppers now expect consumer goods to be sustainable as a hygiene factor without an oncost, I get to a central conclusion on how to bake in sustainability to Category Development.

I pioneered the Quadruple Win concept five years ago, on the principle that Sustainable Category Growth is optimised when activities combine four wins: that of (1) the Branded Supplier, (2) the Retailer, (3) the Shopper, *and now* (4) The Planet.

Combining the last two is key because shoppers are also consumers *and* members of society. So, if more volume consumption is environmentally damaging for People and Planet, growth must come more from value. That means shoppers must be prepared to pay more for products. Those products must then be better environmentally *and* provide a better experience (taste, texture, fragrance, efficacy, appearance, utility), ideally with a natural link between the two. Authentic 'Reasons to Believe' and high repeat rates from products meeting expectations are needed to justify the trade-up. And with more robust data on environmental footprints (and food nutrition, etc) real progress can be driven with transparency.

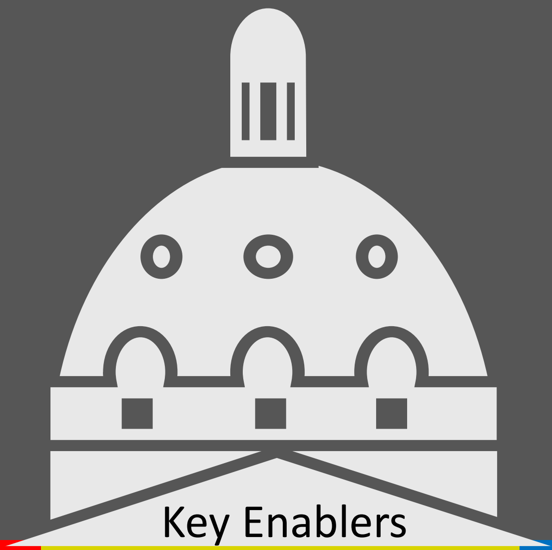
So, from the Ground Level Era when internal product launches and factory capability were shoe-horned into Category Strategies, we now *need* high growth product and brand relaunches with better eco-creds to drive sustainable category growth with scale. We need to go from 'bad marketing' of *"Getting people to want more things they don't need, and maybe can't afford, to impress people who don't care and won't remember anyway"* to more responsible marketing of *"Driving awareness and providing products and services that are better for the consumer, planet and society."*

The "*What*" of Category Strategy Growth simply evolves to "Getting More Shoppers to Spend More, More Often, *More Sustainably."*

The "*How*" to deliver on a tactical level is in a state of flux probably not seen since supermarket 'big shops' began with the family car; but with a vastly increased rate of technological change…

5th and Future Eras

2025-2030 Cat Strats Into Action



'On the Line' Retail Media

AI, Big Data & VR Tech

Shopper Hyper-personalization

Let's conclude with three emerging enablers that I believe will be pivotal in turning Cat Strat into Action over the second half of this decade. Predictions are dangerous and this list isn't exhaustive. We need to be agile and fleet of foot on the 'How', whilst being firmly grounded on the foundations of 'What.'

(1) Retail Media. The speed of introduction of instore digital screens is so rapid that predictions include the media being worth more than TV by the end of 2025,[5] with some branded suppliers paying some retailers more for media space than they earn from product sales. Where does marketing end, and shopper activation start, as two moments of truth converge with branded product demand triggered at the point of purchase? For category and brand, much work is needed to optimise growth and return (I've seen digital screens positioned after the tills, and in Frozen outlets –that's asking a lot for next trip recall!) The novelty of instore digital screens may wear off, but when personalized ads from face recognition go mainstream, classic cardboard POS will likely see reduced impact. The distinction of 'Above the Line' and 'Below the Line' converges 'On the Line', where shopper and consumer mindsets can truly merge.

(2) AI, Big Data and VR Tech will impact both the inputs and the outputs of the Category function. Widespread automation of optimum product range distributions for Range Reviews must be imminent. It's several years since I modelled ROS CWD distribution curves for SKU level cash optimisation, which could now be done with algorithms, including gap analysis. I don't believe AI will replace category jobs, but you could be replaced by someone who uses AI better than you, as they will likely have more time to action the outputs. Big data will also find its place in sourcing, including blockchain, HFSS nutrition data, packaging data, etc. With more data, comes more need to process and visualise it. Virtual Reality Tech and Digital Twinning of stores with unlimited product attributes may be used to advantage.[6] Future shoppers, maybe the 'gamers', may choose also to shop online in VR. And in physical stores, retailers will increasingly use tech, robotics, and link to shopper smartphones for navigation and targeted promotions.

(3) Shopper-hyper personalisation is already here with specific product or film recommendations on Amazon or Netflix, etc. The Gen Alpha shoppers of the future know of nothing else, and their shopping expectations offline will be shaped by online. Grocery loyalty card memberships are increasing towards saturation levels, and the next stage of personalization seems clear - shopper segments of one. Combined with big data and advances in behavioural science, we may scarily not be that far away from the scene in *Minority Report* with tailored ads based on retinal scans. As well as knowing what someone wants to buy, it may also be known how best to convert in a particular place, at a particular time, and in a particular mood. And with short attention span 'System 1,' get ready for Thinking Fast and Thinking Very Fast.[6]

Adam Briggs

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https://jbcommunications.co.uk/jb-arc/

A personal note from the author.

"I hope you have found this compressed history useful with some thoughts for the future. The 'long view' is often missing these days. Particularly with hybrid working and so few opportunities to have a good chat in person with colleagues or older members of your business on their careers or experiences. As I hope is clear, there are many exciting opportunities for Category professionals in FMCG to champion shopper-based, objective sustainable growth. It is a challenging, but hugely rewarding space, where brand marketing, sales and shopper activation meet, and can be harnessed to build retail-facing relationships. With collaborative growth the goal, there are real opportunities for thought leadership into action.

And if you didn't know so much about the Category function before, I at least hope you now know more.

Can I help with perspective? You may recognize the building image as London's Harrods. My colleague and I were attending a Chamber of Commerce function and speaking from the Harrods rooftop bar, and it struck me as a good framework for these 5 'Eras.' As an agency consultant and freelancer there is a real benefit of having a view into the distance, far and wide. And beyond analogies, presenters from different sectors at such events provides a wide vantage that it can be tricky to gain with constant 'swirl' within your specific company. Can I help you to pause and 'look up'?

This 5 Era structure can serve as a training or an inspiration piece. Equally, I can support your detailed category challenges and opportunities: resource gaps, projects, coaching, blue sky brainstorming, advice, job changes, whatever.
Just get in touch. From acorns, oak trees can grow…

References: (1) ROS = Rate of Sale (volume/value); CWD=Cash Weighted Distribution (stores that sell more of the category are weighted more)
AWOP = Average Weight of Purpose -the spend or volume bought by the average shopper (household), usually per year.
(2) Category Captaincy is when a retailer outsources ranging responsibility to a branded supplier, with objectivity a cornerstone
(3) CSRD =Corporate Sustainability Reporting Directive for Eu companies ; DPP = Digital Product Passports with sourcing and environmental metrics now Eu mandated and shopper visible via QR codes for categories like fashion/clothing, furniture, etc
(4) Doughnut Economics model and book; Kate Raworth, 2017
(5) The Grocer UK trade magazine. 15th June 2024 Issue
(6) Get in touch to discuss JB VR including digital twin stores with category and multi-functional data attributes
(7) My comical take on the trajectory of digital media since Daniel Kahneman's seminal work & book "Thinking Fast and Slow," 2011