

# Creating Salience in a Complex Staple Product Category

*The breads category in South Africa has rapidly evolved and fragmented in the last few years – complicating an already complex shelf, making the category more difficult to shop and confusing the shopper. Competitors have introduced new variants into the category – changing and cluttering the various combinations and increasing inconsistency of color and iconography across the category. With this, consumers are articulating more evolved needs from the category which require a new set of product cues including color, texture, shape and pack iconography to communicate new product intrinsics and health benefits.*

*As a staple, high frequency category, the breads category navigation needs to be simple and quick – with brands effectively utilizing color, contrast, shape, and iconography cues at shelf to make the shopping experience as intuitive as possible. In addition, the bread shelf is not consistently designed across channels and outlets, creating challenges in merchandising. Tiger Brands approached Neural Sense to investigate the effectiveness of their existing Albany brand within the breads category. The insights needed to inform the design of new packs for the range, including opportunities that will increase salience (standout on shelf) and aid intuitive category navigation – ultimately designing a pack that wins at a distance of 30 feet, 3 feet and 3 inches from the shopper.*

## Approach

The study was designed as an inductive exploratory piece of research to examine visual salience and the real-world customer shopper experience within two socio-economic categories, which consisted of a middle-income (formal) top-end grocery store and a lower income (informal) general dealer store.

The study used a combination of mobile eye-tracking glasses in real-world store environments to assess the packs within the context of the on-shelf merchandising challenges, as well as the assessment of digital packs/planograms in a lab environment. We tracked how both the category and individual product

packs are visually navigated and we measured the levels of attention and salience achieved by each individual visual element. We also compared these observations with the shoppers' own self-reported responses to their in-store experience using a brief one-on-one exit interview session. This allowed for a comparative assessment of their self-report responses with their visual processing of the various pack elements and shopper experience for deeper insight. Most of the data collected was qualitatively analyzed.

The main research questions included:

- What specific features of the bread packaging are the most salient? (measured by the number of fixations, fixation duration and time to first fixation, as determined by the mobile and remote eye-tracker)
- What insights can be gleaned by a qualitative examination of the customers' handling and selection of bread in-store and their path to purchase? (determined by behavioral analysis of individual gaze replay videos and aggregated heat maps of the bread category)

A total of 40 individuals were pre-recruited, with 20 in each of the different shopping environments. Recruitment was convenience sampled and respondents were not briefed about the study beforehand. The recruitment process was voluntary.



## Results

Our findings provided an understanding of the visual drivers within the category that are influencing the shopper during their shopper journey, resulting in actionable insights for the optimization thereof. Insights identified features of the packaging that captured the most interest, attention and return visits (on eye gaze) and also provided Area of Interest (AOI) performance metrics per visual element that included:

- Heatmaps (focal areas)
- Gaze plot (hierarchy & sequences of visual information processing)
- Time to first fixation; time spent & Revisit metrics

There were marked differences in the amount of visual attention paid to key elements on the various product packs, with the brand logos and product names receiving the highest level of fixations. Of note was the various product iconographies used to denote freshness, health and other product attributes. These were tested implicitly using eye-tracking and explicitly through customer feedback on self-report. Many product elements were found to be too vague and abstract to accurately denote what they intend: for example, customers may not understand iconography for "freshness" and easily misconstrue the meaning.

Salience was primarily affected by three core product features. Changing these features may enhance pack elements and the corresponding brand values/attributes. These included:

- 1) The contrast between colors used, the higher the contrast between surrounding features and the pack element, the more salient the pack element
- 2) Difference in color between the pack element and the rest of the packaging or surrounding pack elements
- 3) The shape of a pack elements' surrounding border or design features used as part of the pack design. For example, irregular bordering or dynamic patterns increased the salience of that specific pack element

Behavioral observations of the in-store experience showed a concern with freshness, particularly in the general retailer category. To this end, customers physically squeezed the bread to check for freshness and looked for the expiry date.

## Conclusions

Marketing in a category with a high diversity of choice, a large competitor set, but relatively low level of product differentiation, is very difficult. We recommend making the best use of your packaging to stand out from your competitor set on-shelf. However, making yourself different does not in itself guarantee a better customer experience. Brands need to improve pack elements by taking into account the way the customer visually and physically interacts with the product, both to enhance the customer experience of your product and their shopping journey within the category. An important consideration is making the pack elements and iconography understandable, eye-catching and able to convey messages coherently.

## Final thoughts

As a major staple, the breads category is under-researched in South Africa. There is also little available information academically and within industry to provide brands with appropriate knowledge to make effective decisions to improve the customer experience. Currently, customers don't experience the information provided on bread packaging as being easy to understand and they are bombarded with too much visual noise, making their decisions more heuristic and less focused. This is especially true when customers have little time to think about their purchase choice and need to rely on salient visual guides and cues to inform their choice.

## CONTACT INFORMATION

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