

How is Trump's war impacting shoppers?

And how to invest differently to win *your* shopper

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1

Higher planning,
higher trip
driving



2

Promotions more
important



3

Identify Value &
Simple shelf
more imp



1

Higher planning, higher trip driving

Shoppers more likely to choose a retailer because of a specific category

Planned purchase



Quarterly uplifts:
Q4 25 to Q1 26



+2%

+2%

ALL statistically
significant uplifts

Category is a main
reason to go shopping

+5%

+12%

Action: **invest more pre-store**, decisions are made earlier (pre-store) and determine trip/ retailer
Action: as cross shopping increases, **retailers need your category to help them win traffic** (ask us where your category ranks)

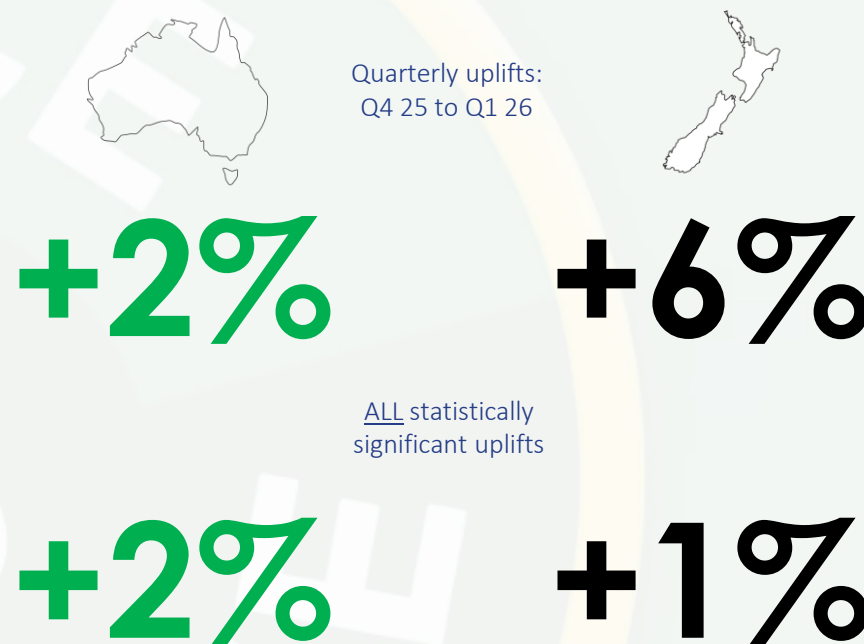
2

Promotions more important

Shoppers more likely to choose a retailer based on a specific price

Promotions encourage shopping

Category is a Price Beacon for the retailer



Action: invest in promotions and price reassurance

Action: invest more pre-store, catalogue critical

Action: if your category ranks high on driving traffic through price, retailers need you more than ever, ask us where you rank to influence

% reflect difference between discrete quarterly reads in Q4 2025 and Q1 2026

% agree/ disagree on NFS on "promotions encourage shopping" and "The way retailer prices their category makes me think I will get good deals across the store"

Sample in Australia per quarter over n=13,000, Sample in NZ per quarter over n=

3 Identify Value and simple shelf more important

Shoppers more likely to want simplicity and value at shelf and more likely to defer or buy nothing if they can't find what they want (at the price they want)

Importance of Identify Value

Defer/ Bought nothing
(if can't find it)



Quarterly uplifts:
Q4 25 to Q1 26



ALL statistically significant uplifts

+2%

+1%

Action: unit pricing, simplicity of price architecture and price reassurance critical

Action: simple range, in stock and clear layout even more important as shoppers increasingly walk away (defer purchase or buy nothing)

% reflect difference between discrete quarterly reads in Q4 2025 and Q1 2026

Importance of Identify Value is a mean score rating scale difference, % agree with 2 of the 4 measures where the shopper would choose not to buy if their choice was not available

Sample in Australia per quarter over n=13,000, Sample in NZ per quarter over n=

Right now, **shoppers are hunting the deal**, so it's up to the retailer to **simplify the shelf!**

Get in touch today to find out how you can best **drive value** for your retail partners:



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