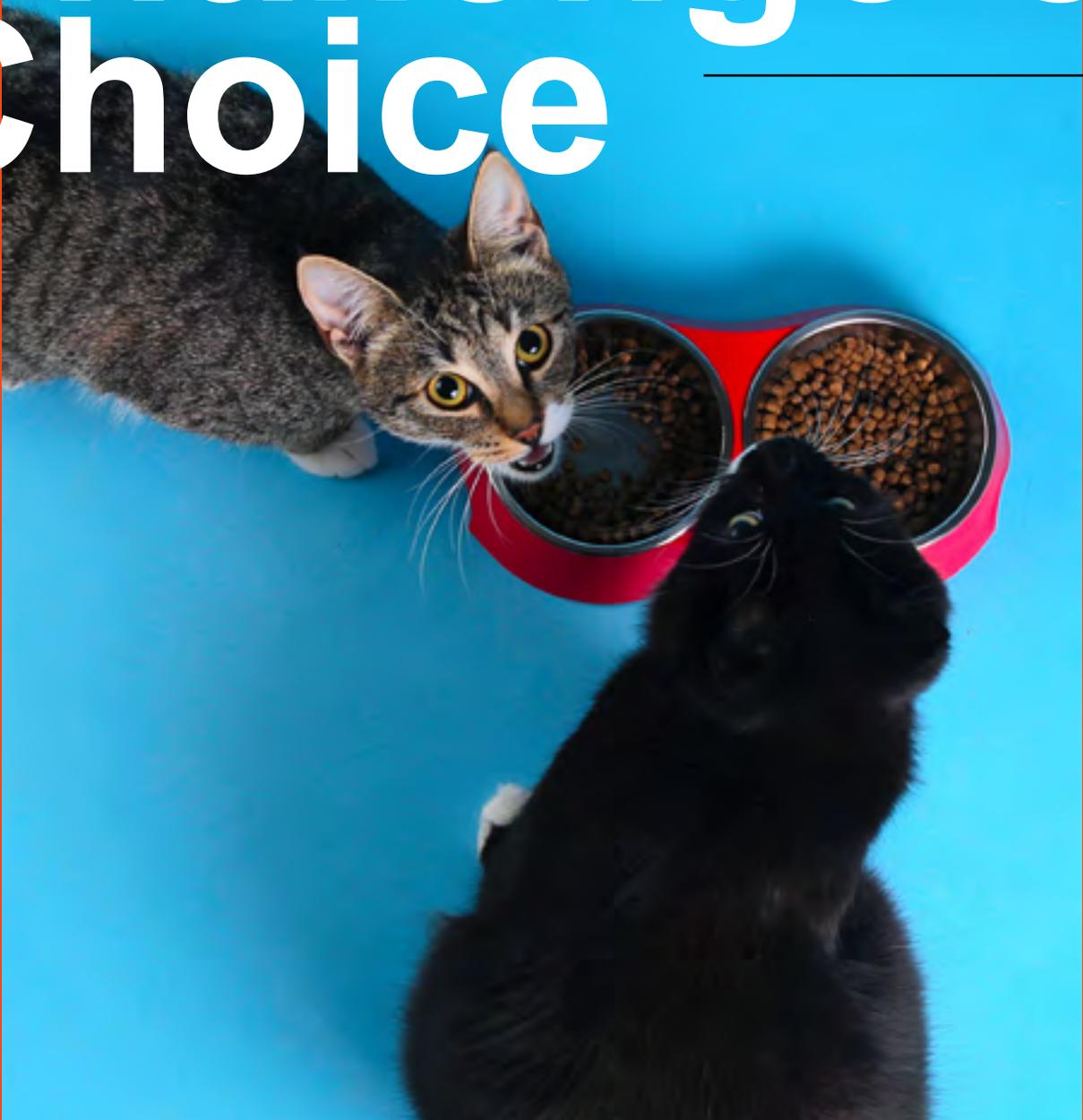


The Challenge of Choice



Exploring the cat owners journey to a belief, behaviour and purchase so brands can inspire, inform and influence choice in their favour.

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Why This. Why Now.

The decision making journey

Today more cat owners are entering the decision making journey for food than at any time before.

COVID-19's impact on consumer behaviour and the manufacturing and supply of pet food has created a perfect storm for many cat owners in finding a food for their cat. This has created an ideal opportunity for brands to disrupt habitual choices to become the new favourite in the bowl.

By deeply understanding how cat owners navigate the decision making journey and learning how to inspire, inform and influence choice, brands can establish what could be a lifelong, highly valued relationship with consumers.

This paper sets out our approach and perspective on the cat food decision making journey, focusing on some of the psychological and behavioural aspects unique to the category.

We've highlighted areas we believe are critical for brands to understand if they are to compete and win with cat owners (and their cats) today; developing optimal product, marketing and communication strategies to deliver on cat owners' emotional and functional needs.

- We have used the term "cat owner" rather than "cat parent" to describe the decision maker for ease, however this does not limit the information provided to those who have low attachment to their pets.
- This paper is intended as an overview.





Two Decision Makers and a Myriad of Emotions

The cat food decision making journey is a complex one and one filled with emotion.

Being responsible for a cat's diet means being ultimately responsible for the health and wellbeing of a pet. Cat owners are singularly responsible for meeting their most basic need for survival and this weighs heavily on the shoulders of most cat owners.

A cat's ability and willingness to refuse food for long periods of time, effectively starving themselves if they don't like a particular food, means the stakes are high. For owners this means the decision making journey itself is filled with emotion, ever cognisant of the potential risk of getting it wrong. And even with the best of intentions and a significant amount of legwork, failure is always an option.

In addition, food is intrinsically linked with the quality of the relationship they have with their pet. Feeding routines and rituals are often embedded with meaning and provide special moments of interaction, engagement and reward. In many cases the reward for the human outweighs the reward for the cat.

The internal narrative of "I'm a good owner/parent" can turn quickly to "I've failed, I'm doing something wrong" on seeing a bowl half eaten or worse, left untouched. Feelings of satisfaction and contentment can rapidly switch to

anxiety and disappointment, diminishing confidence and creating doubt. These heightened emotions create enhanced expectations for any cat food to deliver against.

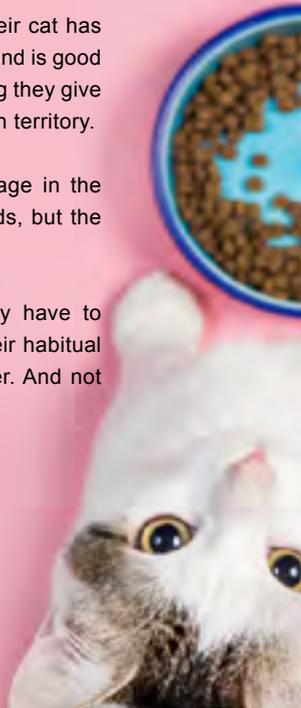
With early influences (veterinarians, friends and family) continuously reinforcing the view that one should only change a cat's diet if necessity dictates, many people only engage with the category sporadically outside of making their habitual purchase, and rarely in any depth.

The threat of digestive upsets, fussy eaters or even food aversions is usually enough to make most owners be averse to trialling new foods, unless a situation occurs which forces them to.

For owners who have continued with a food their cat has always eaten or one they know their cat enjoys and is good for them, the cat food category can be something they give little thought to and is for the most part unknown territory.

There are those owners who do actively engage in the category and are open to trialling different foods, but the majority prefer to stick with what works.

Which is why when cat owners do eventually have to enter and engage with the category beyond their habitual purchase, it can be an experience like no other. And not in a good way.



This is because every single trigger that can push someone back into the decision making journey is laden with emotion. Sometimes positive, but more often than not, negative. Whether mild or overwhelming, these emotions create a unique dynamic within the journey.

The emotional state of the cat owner at the point of trigger informs not just their approach but how they experience the journey. It influences every step and every aspect of it.

How much time and energy they invest, where they go, who they listen to, the actions they take and their expectations of success. Above all it influences their motivations (needs, wants and wishes), and how they change over the course of the journey.

Existing beliefs and attitudes about what constitutes appropriate cat nutrition and good quality food gives them a foundation to work from, but with every new voice they hear, those beliefs and attitudes can be as much called into question as they can be confirmed.

An information search related to cat nutrition and feeding can have an owner disappearing down an information and influence rabbit hole that makes Alice's Wonderland feel normal. When it comes to pet food, everyone has an opinion, and knowing who to listen to and trust with your cat's health is no mean feat.

“I’m a good owner/parent...”

**Meow
Meow
Meow**



“I’ve failed, I’m doing something wrong”

As owners explore the category, the chaos and confusion comes to the fore. Trying to determine which criteria matter most to them from an almost eye-watering array of possibilities (some they’ve never even heard of), coupled with an ever-expanding range of products, can induce even the most rational owner into a state of choice paralysis.

Trying to make sense of the complicated and comprehensive criteria they need to base their decision on can test cognitive capacity to the nth degree. And brands aren’t helping. Rather than making it easier for people to understand and navigate the category, most are making it worse.

Owners are left to fend for themselves, trying to find sources of information and advice that can help make the journey a little less painful, and have some chance of success.

Ultimately, with a cat's inability to communicate any preference except by their behaviour at the bowl, owners have to at best interpret their cats actions towards food, make assumptions about what the cat finds palatable and then engage in some calculated guesswork and eventually take a leap of faith

Unfortunately, despite all the time, energy and in some cases money invested in the search for the right food choice, the real ‘moment of truth’ is when the cat is faced with the bowl of food.

They alone are the ones who decide. They vote with their mouths to give the metaphorical thumbs up or thumbs down, determining if the choice has been a good one, or if the cycle needs to be repeated again. And possibly again.

Cat owners are at best a curator of options or a proposer of solutions, but are not, and will never be, the final decision maker. Ultimately this choice sits firmly in the hands (or paws) of their cat.

This knowledge, that the result is as much based on luck as it is on judgement, whether gained early on or learned the hard way after a number of years, makes the decision making journey to find a new food one they’d rather avoid.



The Impact of COVID-19 on Cat Food

COVID-19, cat owners and cat food

The impact that COVID-19 has had on the lives of people with cats and the cat food industry has been nothing short of astounding.

In a single year we've seen a record-breaking rise in first-time cat owners around the world, the unprecedented acceleration of online purchasing behaviour, an almost overnight change in feeding habits and food choices (most notably the seismic shift from dry to wet food), the near collapse of some major pet food brands supply chains, and the exponential growth of a new generation of Direct to Consumer (D2C) pet food brands.

It's hard to imagine anyone foresaw a time when manufacturing, distribution and global logistics would have to cope with the realities of social distancing, disease control, reduced access to raw materials, and the nightmare of reduced transport and closed borders.

Who could have anticipated the rapid shift in cat owner attitudes and behaviours towards their cat and its food as a result of the virus. Or, how quickly those habits and routines that had been cemented over years would unravel as the rhythm of life for both the cat and the owner changed almost overnight.

For many cat owners, the novel position of being home with their cats 24/7 was something they embraced with joy and exuberance. It afforded them extra time to interact and engage and as a result found themselves increasingly incentivised to explore different ways of making their interactions more rewarding.

For some, the increased time at home resulted in a more intense focus on their health and wellbeing that prompted an increased interest in their cat's health and wellbeing and most notably, their diet.

Everything from the type of food, its format and its flavour came into consideration. As different types of food and feeding habits were explored, many experienced (for the first time, possibly) an openness to trialing a new food and took the opportunity to go for it.

Others found themselves on the wrong end of a supply chain nightmare. They empty shelves, or 'out of stock' messages that blinked back at them from their screens, spurring the realisation that the golden rule of never switching your cat's food was about to be broken.

And as the economic impact of COVID-19 began to be felt and budget constraints kicked in, some owners were forced to reconsider their choice of food from a more "budget-friendly" point of view*.

Whatever the COVID-19 trigger, whether it be the arrival of a new cat, or the desire to improve a cat's nutrition, or even the harsh reality of an out-of-stock food or reduced budget, an extraordinarily high number of cat owners are currently entering the cat food decision making journey.

In most cases they are unprepared and once they start, more than a little overwhelmed.

***Note: this list is not exhaustive!**

Pet Food eCommerce sales surged 77% in March 2020 (Nielsen 2020)

Subscription purchases of pet food increased 28% in March 2020 (PetFoodIndustry.com 2020)

Pet Products now fifth largest purchase category for Amazon Prime Users (emarketer.com 2020)





There are some brands that are seeking to tackle the choice overload with limited ranges and clear navigational cues, **but they're the exception, not the rule.**





The Paradox of Choice

A Crowded Category

Cat lovers, (like all humans), enjoy having an abundance of choice when making a purchase. Options appeal to us. They give us the feeling of being in control, of being thoughtful in what we do and of being exacting and purposeful in our choices.

However, too many options often make it harder for our brains to process them, to evaluate and compare our choices, sometimes to the point of not being able to make a decision at all. It's not by accident psychologists have termed this phenomenon 'choice paralysis'.

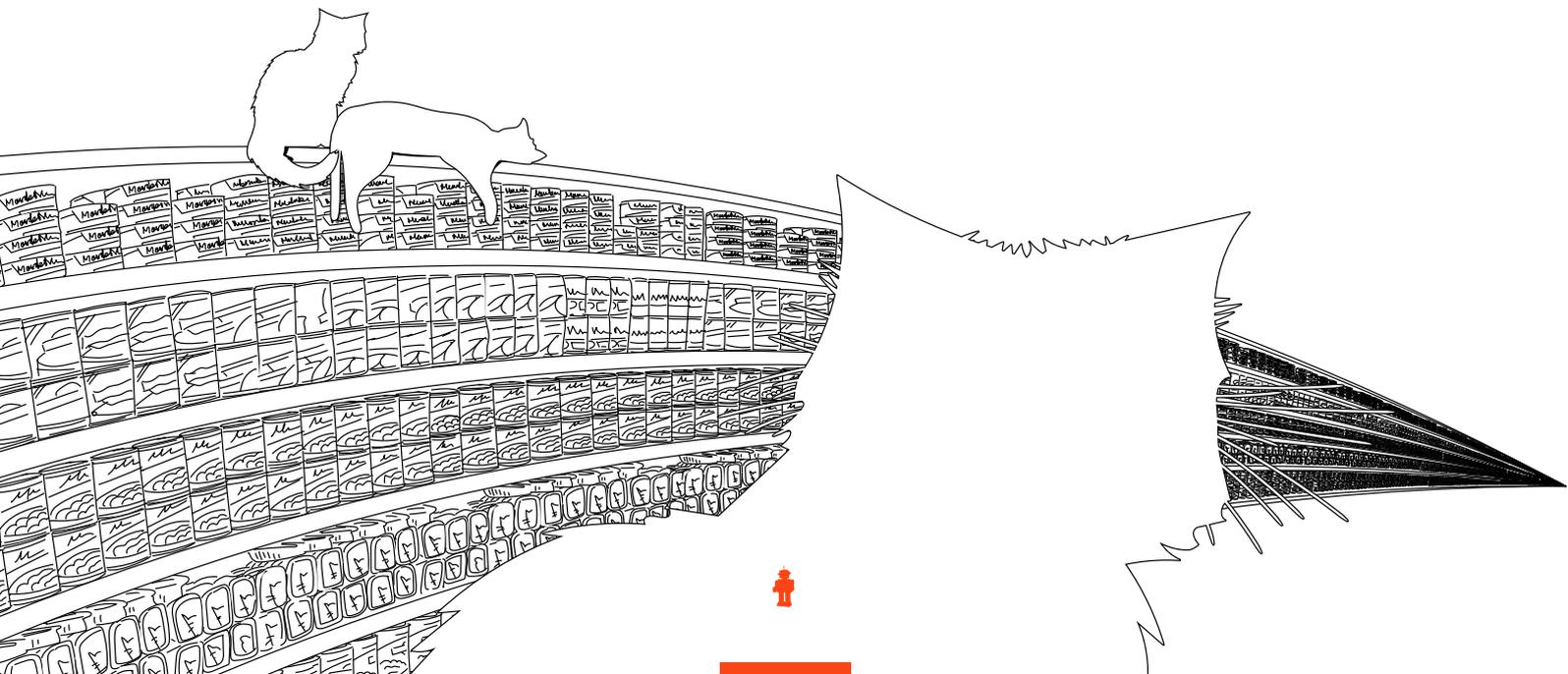
When faced with an overwhelming number of options, few people act in the way they originally set out to, and do so in almost exactly the opposite of the way brands want them to act.

For anyone entering the cat food category for the first time, or even re-entering after a break, the choices can be overwhelming and baffling. The rapid rate of innovation in the category and the explosion of product choices addressing different feeding variations can leave even the calmest of cat owners feeling anxious and confused.

Even when a cat owner has a preferred brand, clear selection criteria and a set of specific nutrition requirements, the number of options available to meet those needs can confuse and slow, or even stall their decision making.

It can also create a 'paralysis shortcut cue' which is a random criteria they default to in those moments; 'I'll pick this one because I like the picture of the cat on the front'.

And this choice in the face of paralysis almost always leads to unhappiness.



Choice overload is a real thing, and in cat food, it's a really big thing.

If the chosen food isn't met with joy by their cat, it's very easy for people to feel not only disappointed but frustrated with themselves for not having picked better, especially given the abundance of choice available to them.

Choice, in a moment of paralysis, often leads to regret as cat owners mentally replay all the different options that 'probably would have been better', and the chosen brand quickly tarnishes in their mind as they feel let down (by themselves and by the brand).

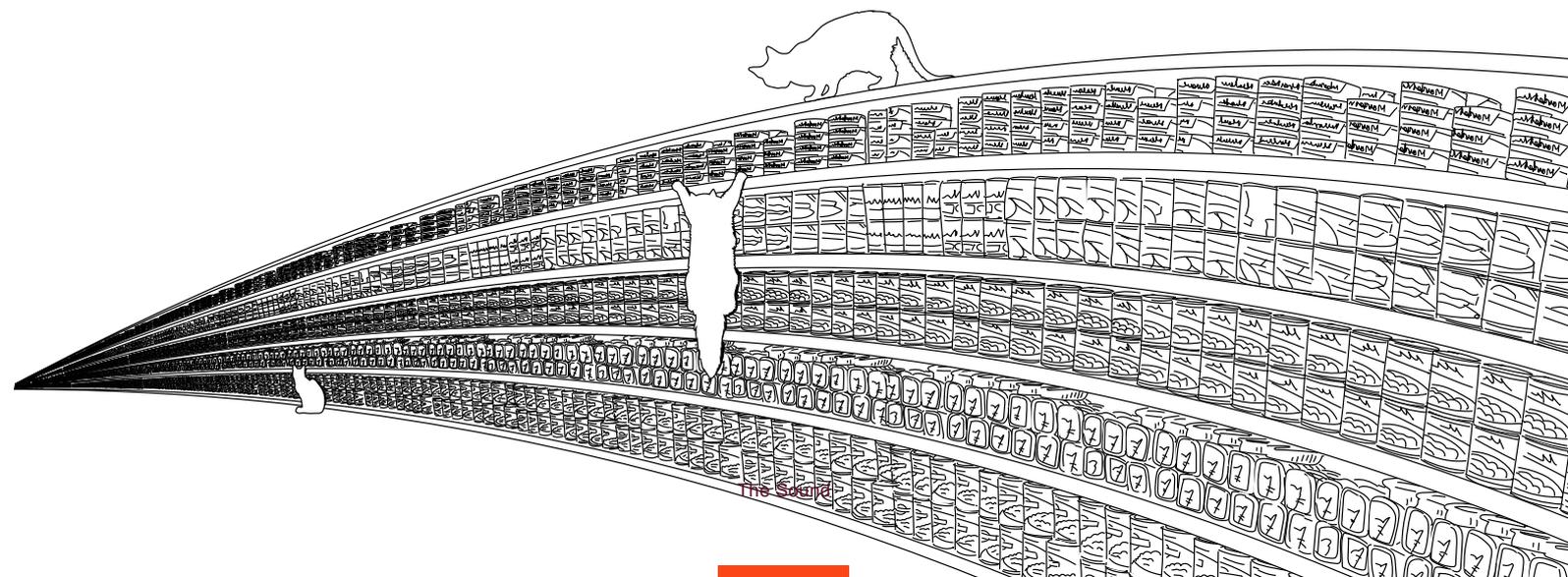
There are some brands that are seeking to tackle the choice paradox with limited ranges and clear navigational cues, but they're the exception, not the rule.

Despite knowledge of the choice paradox, its effect on people's satisfaction and its impact on future brand perception and preference, it's astounding that in the race for increased market share, most brands are continuing to add to the complexity and confusion, rather than seeking to simplify the category for consumers.

As the cat food category continues to expand and evolve while human food trends continue to inspire new preferences, the number of options and choices will continue to grow.

This is bad news for cat owners who, more often than not, face a near impenetrable wall of choice when trying to find new food for their pet. Irrespective of whether the starting point is a positive one (to improve or expand the cat's diet) or a negative one (to replace an unsuitable or unavailable food) the confusion and frustration felt is often the same.

It's also bad news for cat food brands who will continue to face increased competition, possible portfolio cannibalisation and worst of all, experience the consequences of a choice-paralysed consumer.







The Criteria Conundrum

A complicated category

When it comes to what matters most, the number of elements a cat owner can consider when thinking about their pet's food choice can be daunting.

As the category expands to address the latest trends, not least the humanisation of pet food the list of elements to consider increases exponentially. The category itself presents a dizzying encyclopaedia of different aspects and attributes for cat owners to think about and evaluate options against.

For many people, until they enter the decision making journey, they have little knowledge or experience of all the elements to consider. Everything from the type of diet they could feed their cat through to how recyclable the packing is. The cognitive weightlifting involved in exploring, identifying, prioritizing and finally determining a set of criteria is no mean feat.

And to make things even more challenging, as people learn new information about feline nutrition, brand and product attributes at any stage of the journey, their selection criteria can change, meaning any 'final criteria' is only final at a singular moment in time.

Even when the selection criteria has been met and a can or pouch is firmly placed in the basket, the real decision making occurs when the food is given to the cat. This Moment of Use - the moment the cat faces the bowl and is met with a different format, taste, texture, aroma and flavour profile than they are used to. Which, as any

cat owner knows (even with every element of selection criteria met) holds no guarantee that the food itself will be palatable to their cat.

When food refusal or rejection happens, cat owners (after a brief stand-off) end up rejoining the purchasing journey, often having to make trade-offs and compromises, re-evaluating criteria and re-engineering their expectations.

And while some owners quickly develop a way to measure the likelihood of palatability to help guide them through the category, many have learned in dismay that a cat's own preferences can vary hugely over time.

For many owners, finding a food that will be eaten, and will continue to be eaten often turns out to be a blend of best guess, hope and trial, rather than the outcome of a scientific evaluation of criteria.

Unfortunately, this discovery often comes right at the end of the head-scratching and brain-numbing exercise of trying to navigate a category that continues to develop, evolve and innovate faster than the average cat owner can comprehend.



The Relationship Ratio

Not all cat owners think and act the same

Understanding the relationship a person has with their cat is critical to understanding how they approach and navigate choice within the category, and how a brand can help influence that choice.

People who have a deeper, more humanistic relationship with their cats (they see their pet as a friend or family member) tend to invest more of themselves in the decision making process.

They educate themselves about their pet's health and commit more time, energy and in some cases more money to finding the right food for their furry friend.

These owners are emotionally engaged throughout the process and even when a selection has been made and the cat has given it the seal of approval, they are open to the possibility of finding new ways to support their feline's nutritional needs or adding further enjoyment to feeding and treat time.

For many of these highly-attached owners, the journey of discovery and selection can be as rewarding as watching the bowl of new food be licked clean.

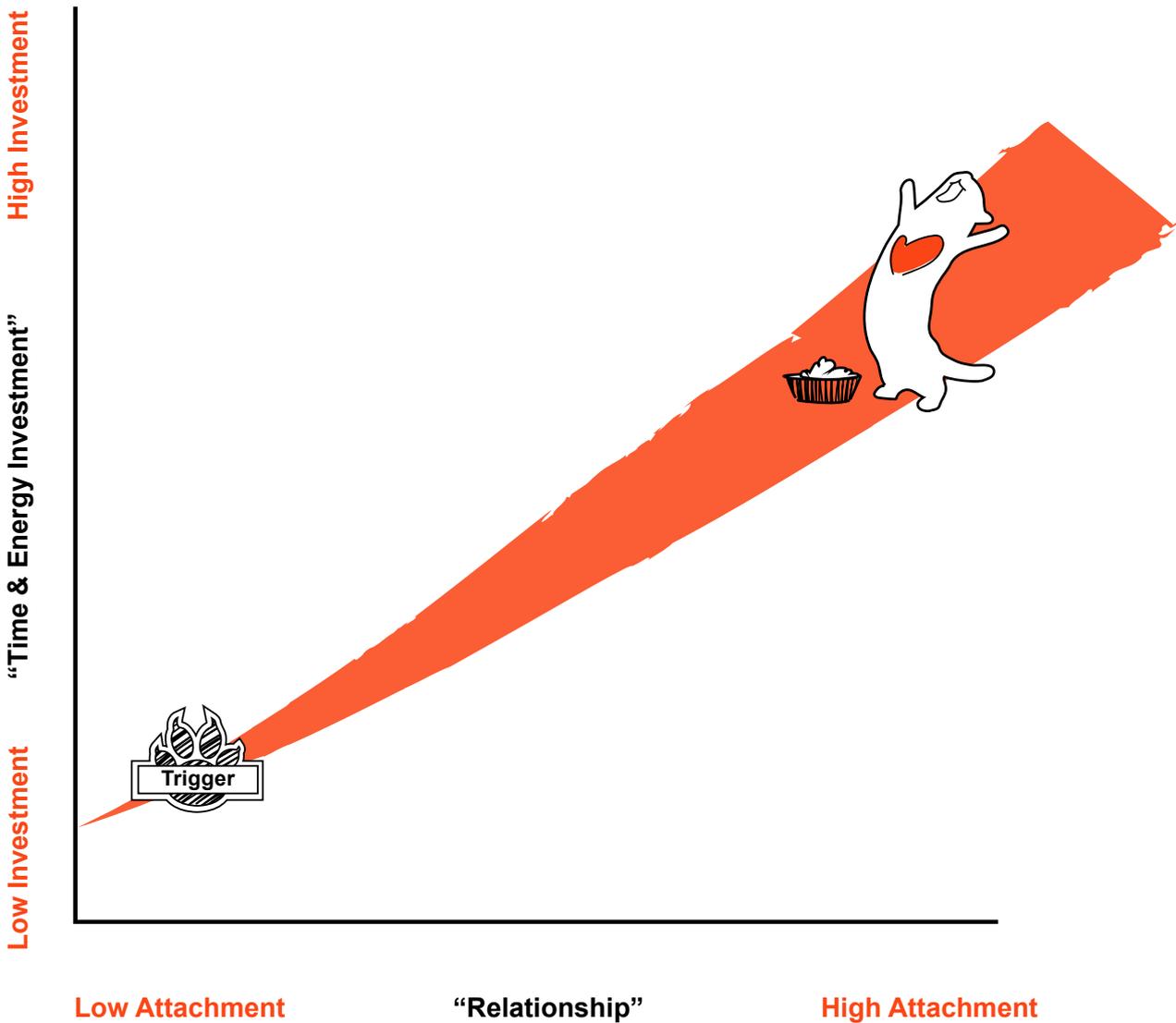
Conversely, those who have a lower level of attachment to their cats and don't see them as a human substitute tend to pass through the decision making journey quicker and with less involvement. Once they've settled on a choice that works, they rarely re-enter the process without a significant trigger. In fact, most low-attachment pet owners aren't open to new brands or creating a portfolio of brands in the absence of a trigger event.

All cat owners, irrespective of where they sit on the spectrum of low to high attachment, pass through most of the stages of the decision making process, albeit at different speeds and with different levels of interest and involvement.

While there is a correlation between attachment and how much money owners are prepared to spend on their cat, it isn't absolute.

Highly-attached cat owners on limited budgets may not be able to purchase Super Premium foods, however they will often (if not always) seek to feed their cats the best available option within their price range. And by contrast, some low-attached cat owners with a higher disposable income may purchase Super Premium foods simply due to affordability and ease rather than an interest in premium nutrition.





Having absolute clarity on the different types of pet owners and their degree of price sensitivity is important, but understanding how each type moves through the decision making process is critical.



The Ecosystem of Influence

Knowing who to listen to is half the battle

Not all advice is equal. As many cat owners discover early on in their decision making process, there is no shortage of advice, opinions, recommendations and warnings about what they could and “should” feed their pet.

From the Personal to the Professional, points of view are largely shaped by personal experience and preference rather than an objective view of the cat's nutritional needs and an understanding of what matters most to the cat's owner.

72% of cat owners don't believe brand advertising influences their decision making.

The Sound Pet Food Survey 2020

Who people go to, their key influences in their moment of need (inspiration, information and/or advice), is as interesting as the weight they give the advice from that source.

For many cat owners, their veterinarian still ranks as the #1 source of information and advice when it comes to pet nutrition and what they should be feeding their cat. Formed from a belief that a pet professional would have both in-depth knowledge around nutrition and the best-interests of the individual pet in mind, cat owners lean into those recommendations.

However, as awareness increases around commercial deals struck between big brands and veterinary practices, trust in this source is diminishing. This is leading many owners to turn to the internet in search of what they perceive to be unbiased opinions from people 'just like me'.

They turn from one voice to one million voices. One opinion to a million opinions.

Google's introduction of the Zero Moment of Truth in the decision making journey in 2014 highlighted just how much these online voices are contributing to decisions being made, not just in the evaluation and shopping phases of the journey, but in real time.

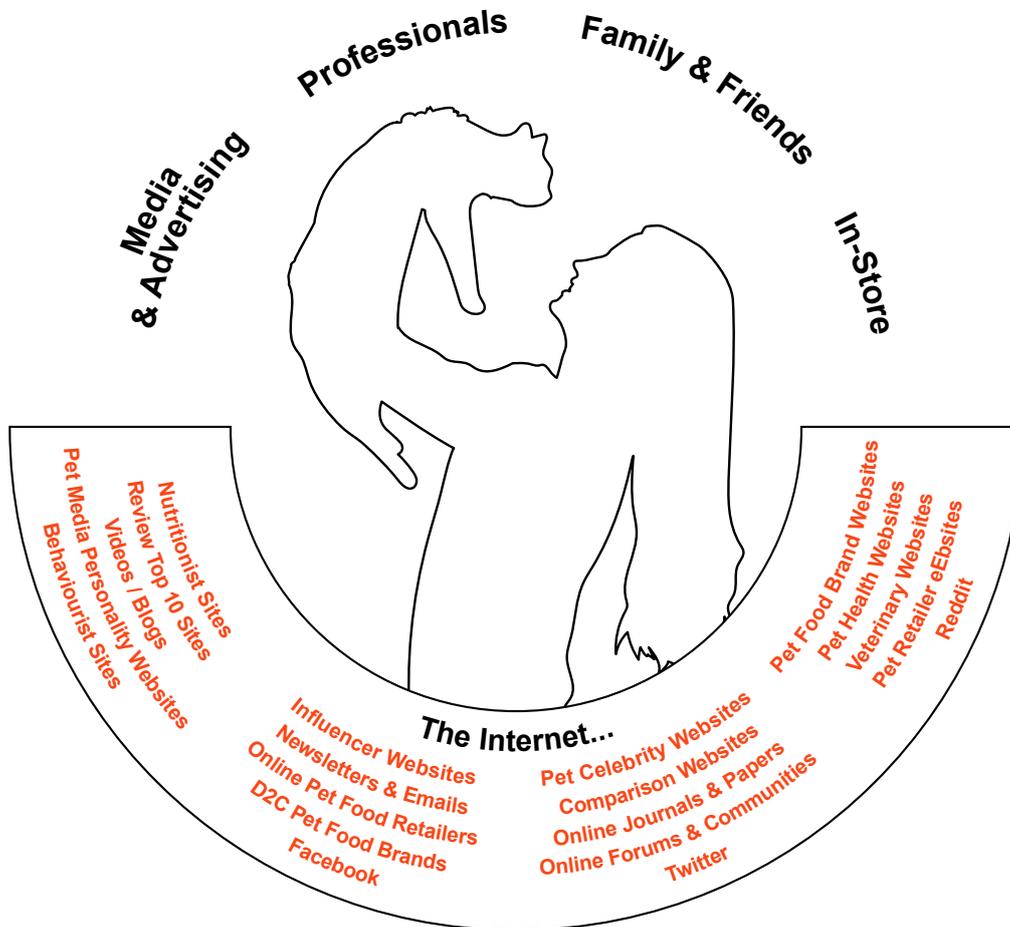
The internet and its infinite pet resources - everything from community forums, blogs and social chatter, to pet-focused websites, health advice centres and even brand portals - are all able to be served up by a simple search function. Such sources have become an integral part of a cat owners' day to day lives, increasing the number of influences on their decision and creating even more complexity when it comes to discovering what the best food is for their pet.

Pet food brands who are a trustworthy voice cutting through this noise are the exception rather than the rule.

Whether seeking information or inspiration, in a process of discovery or evaluation, navigating the noise of the category and community combined, is one of the greatest challenges for cat owners.



Knowing who to believe and trust is the ultimate challenge.



Ecosystem of Influence

Key Changes

- Traditional sources of information and advice are being seen as biased, less reliable and untrustworthy.
- Personal recommendations by people perceived to be 'just like me' carry greater weight than professionals seen to be in business with big brands.
- The voice of the internet adds a layer of complexity and confusion whilst navigating the category yet equally has a significant influence on belief formation and decision making.
- Brands play a minor role in influencing decision making outside of packaging and point of sale merchandising.
- New start-up brands, particularly D2C Subscription Services and Fresh Food brands are leading the way in providing unbiased pet nutrition and health advice as part of their proposition.
- Media and advertising scores lowest on influencing the cat owners decision making journey.
- In-store has less influence with reduced visits and a migration towards online shopping.



The Foundational Model for Decision Making

A circular journey

For decades the consumer's decision making journey has been thought of as a funnel, a singular path that each consumer passes through into (ideally) a System 1 habitual purchase loop.

Brand and Marketing teams optimised their messaging and activity to support the funnel and thought little beyond the point of purchase. Establishing loyalty and focusing on retention was the secondary to the primary goal of new customer acquisition.

Over time the funnel has given way to a more circular decision making journey that better reflects how people now make their buying decisions. It encompasses the multiple paths to purchase and the multitude of channels and influences that now exist.

The three stages that have seen the greatest shift in consumer behaviour are initial brand consideration, active evaluation and post purchase when people are in 'experiencing' mode.

Brand Consideration: Rather than starting with a list of preferred brands (driven by awareness and some experience) and narrowing this list down to a few final options, people start with those few brands in mind, but seek to explore the category looking for information and additional options before refining their consideration set.

Active Evaluation: Rather than responding to marketing 'push' messages from brands, people are now 'pulling' in information from the world around them. The rise in influence of word of mouth and consumer reviews, third party advisors and above all, the voice of the internet, has had a profound effect on how people view and evaluate brands and products.

Post Purchase: Rather than automatically falling into a habitual purchase loop after making the initial choice, people are continuing their information search and evaluation once they've experienced the product. The role the brand and product plays in this experiencing stage can make all the difference to whether or not the brand becomes a habitual purchase and resistant to switching.

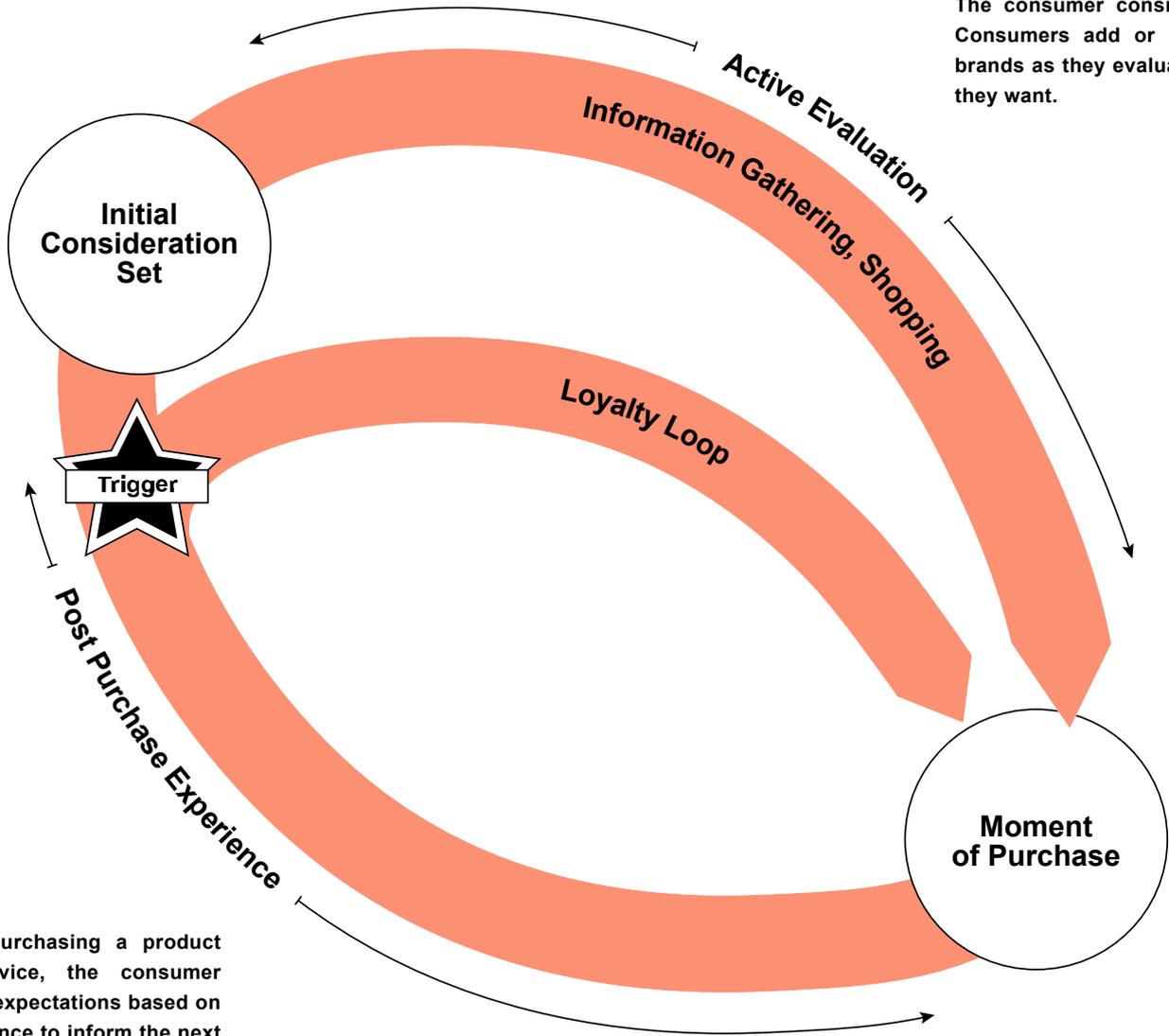


1.

The consumer considers an initial set of brands, based on brand perceptions and exposure to recent touch points.

2.

The consumer considers an Consumers add or subtract brands as they evaluate what they want.



4.

After purchasing a product or service, the consumer builds expectations based on experience to inform the next decision journey.

3.

Ultimately, the consumer selects a brand at the moment of purchase.

The McKinsey Model



A Decision Making Journey for Cat Food

An evolved model for a complex category

To help us better understand the complexities of the pet food decision making journey, we have adapted the McKinsey model... a little.

We address the fact that there are at least two decision makers in the journey. One who is more of a curator of options and the second who is the true decision maker. We also added a few new elements

The Moment of Use: The defining moment of the journey when the cat is presented with the choice

A Reconsideration Route: A shortcut into the later stages of Active Evaluation when a cat refuses a choice

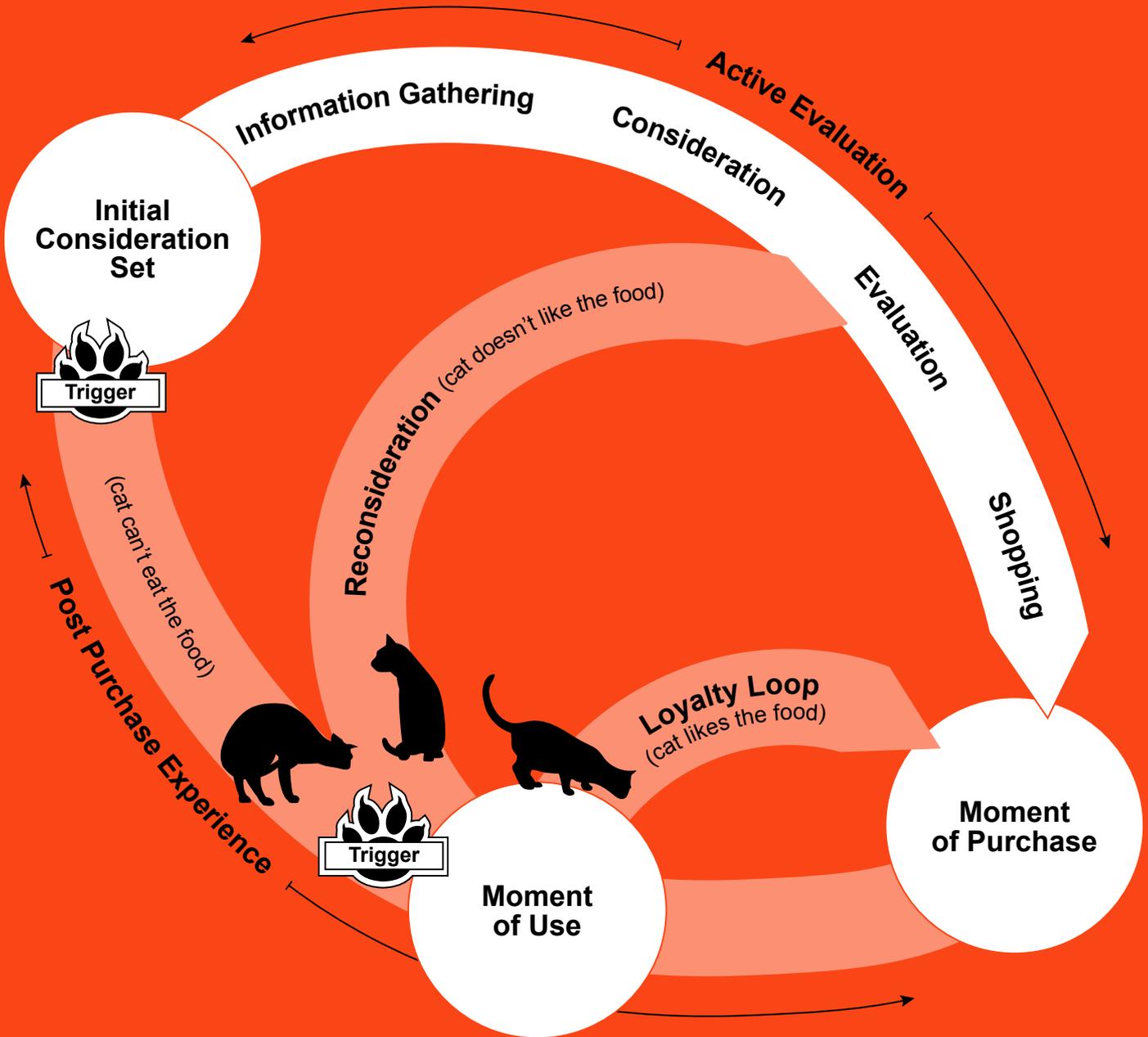
A Secondary Trigger: An event that can force a change to the initial decision criteria

In the following section we map out the different phases and stages of the decision making journey, focusing on key elements particular to the cat food category, and the psychological and emotional journey cat owners experience as they progress through it.

We also highlight some of the issues brands need to be thinking about to understand how to show up and be relevant in moments that matter.

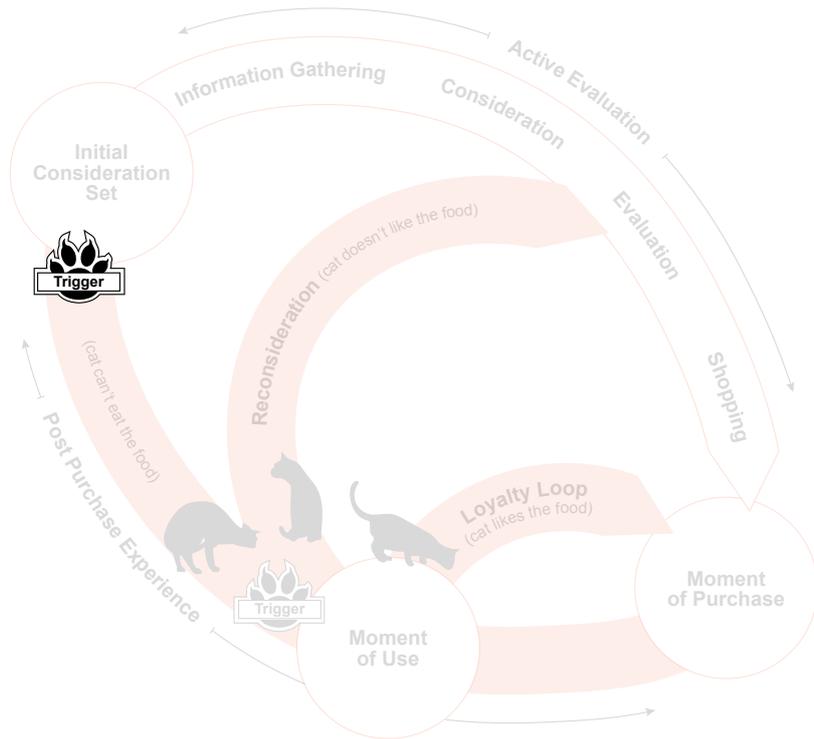


Not all cat owners think and act the same.



Cat Decision Making Journey (CDJ) Model

Triggers



CDJ Model - Triggers

How emotion determines experience.

Almost all triggers that send cat owners into the decision making journey are emotional in context.

Some are positive: bringing a new cat into the home, self-triggered journeys of discovery exploring new food types, being inspired by an external source to improve the quality or variety of the cat's diet, or even an interest in alternative proteins, sustainable sourcing or recycled packaging.

Many are negative: food intolerances, dietary sensitivities, allergies, medical conditions, or temporary and long-term food aversions. Even life stage changes that prompt a necessary change of diet can be negative for some as they confront their pet's mortality. For most cat owners, just the thought of a food that they use regularly becoming unavailable is enough to trigger a sense of panic, let alone it being a reality they have to deal with.

This emotional 'loading' as people enter the decision making journey makes a huge difference to how they pass through its different stages and perceive the category. It also shapes their expectations of what success looks like at the other end.

A journey with a positively viewed trigger, underscored by positive emotions such as anticipation, excitement or even curiosity tends to be a journey of exploration, discovery, and openness to possibility. This is when a cat owner takes their time to make the right choice.

A journey with a negative trigger that's underscored by negative emotions such as desperation, fear or even boredom, tends to be the exact opposite. By nature, human beings want to feel these emotions for the shortest amount of time possible, so they will go to great lengths to enter and exit the journey as fast as they can. They have a different mindset, one that is less open, less responsive and more inclined towards shortcuts and fast trade-offs.

People's motivations (needs, wishes and desires) can also change as their emotions change.

If anxiety and concern (motivation = I need to find a replacement food now that the usual one is out of stock) gives way to desperation (motivation = I just need him to eat something, today) then the motivation changes and it affects the way they navigate the category, the options



No emotion is more powerful than the emotion felt at the point of trigger.

they consider, the trade-offs they are willing to make and the speed at which they are willing to make them.

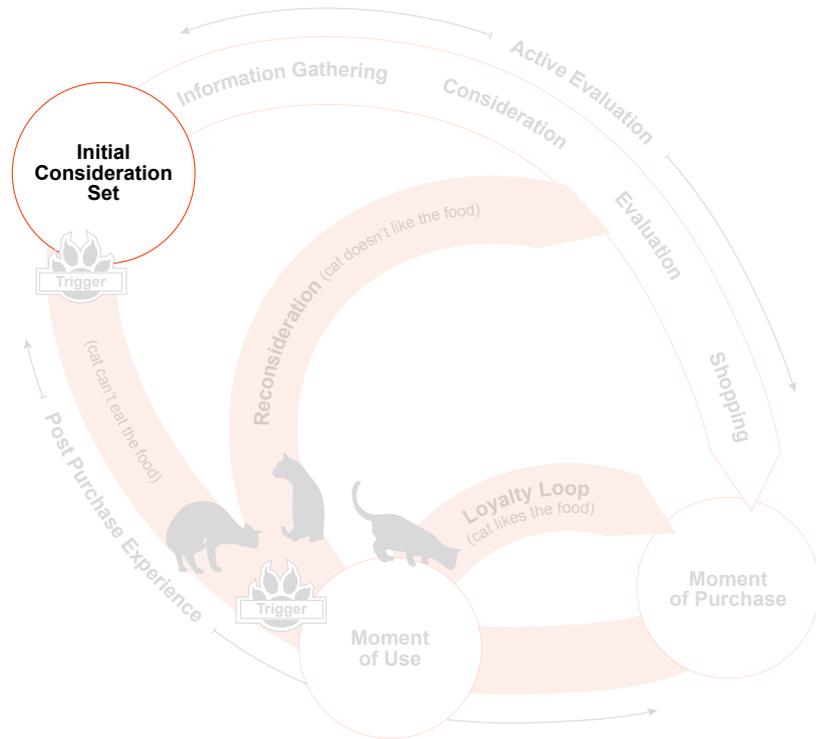
Emotions affect everything; from the amount of time and energy people are willing to invest in the decision making journey, the speed and efficacy with which they are able to evaluate options before settling on a final consideration, and finally their expectations for what success looks like.

And no emotion is more powerful than the emotion felt at the point of trigger.

To be empathetic and empowering when a trigger occurs the brand needs to:

- Identify all the different triggers (inflection and disruption) and the emotional response at the point of trigger
- Understand how each trigger's corresponding emotions impacts the way people enter and experience the journey
- Understand the relationship between trigger, emotion and people's initial motivations for beginning the journey
- Understand the emotional and cognitive support owners need (and actively look for) at a trigger event
- Understand how the brand is perceived at each trigger event

Initial Consideration Set



CDJ Model - Initial Consideration Set

How passive exposure informs preference.

Every day existing (and future) cat owners are forming impressions of cat food brands, whether they realise it or not.

For most, these impressions are passively collected through the normal course of day to day life through exposure to multiple sources and influences (e.g. brands, products, services, ads, media, content or even just general conversation with fellow pet lovers).

At this stage they're not thinking about acquiring or switching brands, in fact, they're probably not thinking much about cat food or treats at all.

Some people might spend more time involved in the category, seeking inspiration or information outside of an actual purchasing need. This could include exploring new innovations or how brands are tackling macro issues like sustainable farming and recyclable packaging, or being curious about human food trends such as plant based proteins and probiotics are appearing in pet food.

For the majority of people however, exposure to cat food brands and products outside of a trigger event or need is passive.

As these impressions accumulate over time, a subconscious shortlist is created. This shortlist forms the Initial Consideration Set (ICS) that a person defaults to as they enter the decision making journey.

This ICS is more than just a set of brands that have captured mind-share (top of mind awareness of a brand). It's a set of brands that have already passed an initial mental stress test against a set of selection criteria (even if this criteria is superficial at this stage) and are considered real potential purchasing options.

Considering the sheer volume of brands and products that make up the category, coupled with the almost limitless information sources and influences/influencers that surround it, the actual number of brands that make it into a person's ICS is very small (McKinsey estimate the number to be between 3-4).



These 3-4 brands however prove to be highly influential when it comes to the Moment of Purchase, as a brand in an Initial Consideration Set can be 3 times* more likely to be purchased than one discovered later in the decision making journey.

Despite this potential upside, many brands don't invest sufficiently or effectively in winning heart and mind-share before someone is actively in the decision making journey.

Despite this potential upside, many brands don't invest sufficiently or effectively in winning heart and mind-share before someone is actively in the decision making journey.

For some (particularly new and niche brands) it's truly an uphill battle. Their distribution channels often exclude mainstream grocery stores and online pet food retailers and in comparison to the bigger brands, their insight, marketing and communications budgets are limited.

But even for long-standing and mass brands who have visibility, broad distribution channels and marketing firepower to reach people at any given moment, their ability to enter into an ICS isn't guaranteed.

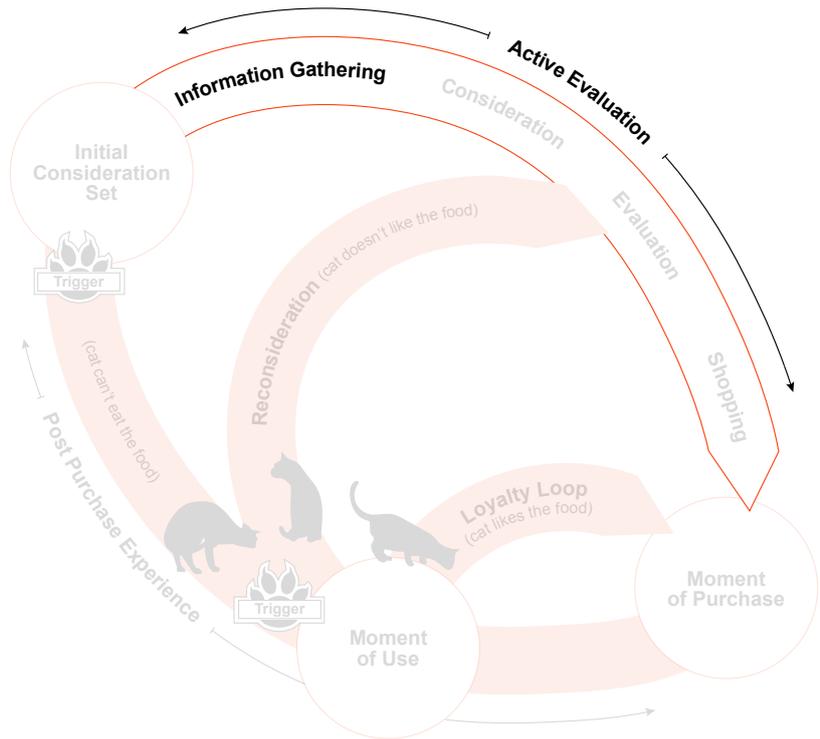
Entering an Initial Consideration Set is one of the greatest challenges for brands, but also one of the greatest opportunities.

**Harvard Business Review / Consumer Decision Making*

To make it into a cat owner's initial consideration set the brand needs to:

- Understand how the brand shows up, and its level of resonance during passive exposure
- Understand the roles advertising, media and content sources play in shaping an ICS
- Understand the role retailers and other distribution channels play in shaping an ICS
- Identify initial selection criteria brands are being subconsciously stress tested against to enter an ICS
- Understand how much of a preference is given to brands within an ICS as they move to Active Evaluation

Active Evaluation / Information Gathering



CDJ Model - AE Info Gathering

How belief systems and biases can blinker us.

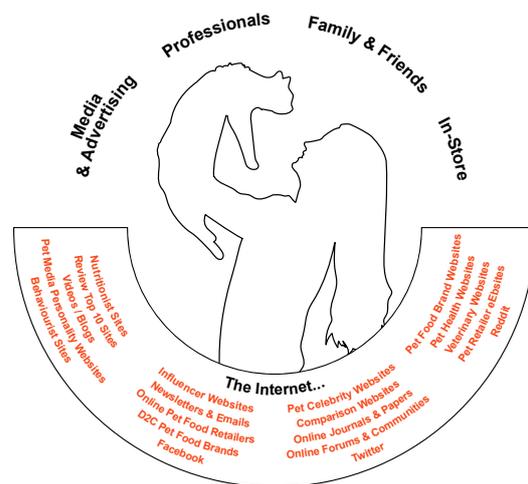
All cat owners enter the decision making journey with existing beliefs about cat food and what's best for their cat's health.

Whether these beliefs have been shaped by a lot of information from trusted sources over a long period of time, or by little information from unknown sources in a short window of time (or anywhere in between); these beliefs serve as a foundation for each person's journey.

Their attitudinal starting point.

These beliefs are powerful because they inform the types and sources of information people seek out and how much value they give to each piece of information. Existing beliefs inform who and what will become their Ecosystem of Influence, which in turn will inform their attitudes, preferences and purchasing decisions.

Beliefs can be challenging because they can make people prone to several biases, not least of which is Confirmation Bias (the likelihood of being drawn to and focusing on information that already supports one's existing beliefs) and Anchoring Bias (the tendency to be led by the first



Ecosystem of Influence

piece of information that was acquired and the inability to revise an opinion based on new information or evidence). They both serve as very real limitations for someone trying to gather information and educate themselves in the hopes of making an informed and regret-free decision.



This can be easily seen when it comes to the subject of raw feeding. Many vets have been vehement in their assertions to pet owners that raw is dangerous and that the likelihood of it containing bacteria and other harmful pathogens is high. If an owner received this point of view from someone that they trusted, any subsequent positive information about the benefits of raw food from a different source would tend to be automatically discounted. Even a source with relevant and credible information on a different topic could be dismissed because they advocated for raw, or were seen to support it.

Despite these early beliefs (and their accompanying limitations) most people will still enter into the Information Gathering phase of Active Evaluation with curiosity and some degree of willingness to learn. They are seeking to discover and understand everything from what a “good quality diet” should look like to what exactly constitutes healthy feline nutrition, not just about all the different brands and products that are available.

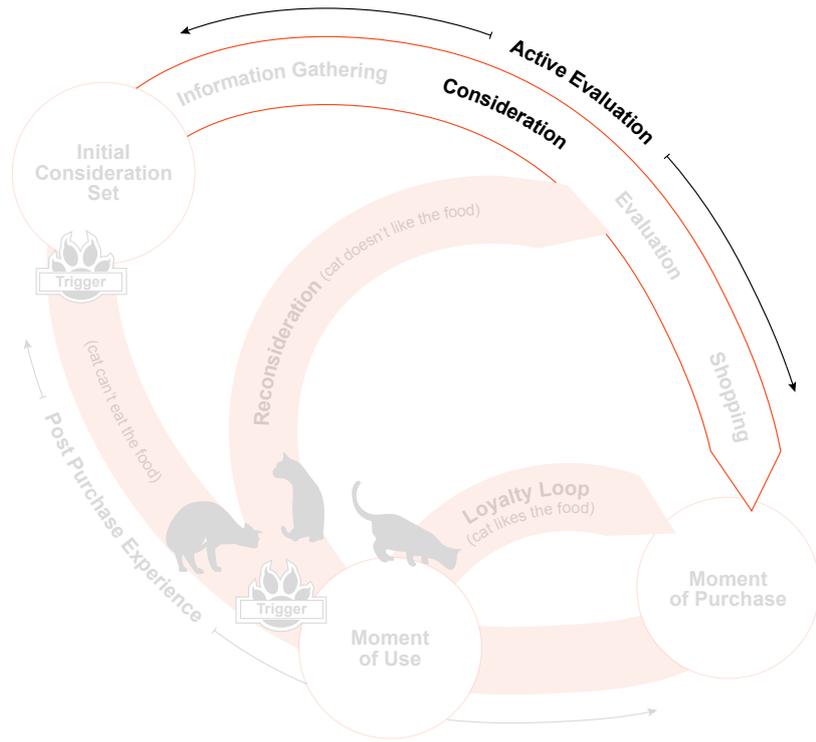
Regardless of where owners rank on the attachment scale with their pets, almost all of them want to feel like they are making a good choice and will turn to others for inspiration, information, advice and in some cases validation.

These ‘others’ become their expanded Ecosystem of Influence.

To influence choice during the exploration phase the brand needs to:

- **Understand what and who forms the Ecosystem of Influence for the owner before the trigger event**
- **Understand people’s beliefs about the category and their path to belief formation**
- **Identify the people, platforms, media and brands that form the expanded Ecosystem of Influence in the Information Gathering stage**
- **Identify the different Information Gathering need states (inspiration, information, evaluation, validation) and the accompanying emotions**
- **Understand which part of the Ecosystem people lean into in each need state and where ZMOT’s occur**
- **Identify the moments that matter most (pain points / wish moments) where the brand can play a meaningful role in addressing needs, emotions and wishes**

Active Evaluation / Consideration



CDJ Model - AE Consideration

How needs, wants and wishes rarely remain static.

Consideration is a tale of two halves; determining selection criteria and identifying brands that potentially meet the criteria.

They can occur simultaneously and iteratively, and overlap with both preceding and proceeding phases (Information Gathering and Evaluation).

The first step, determining selection criteria will have begun as the cat owner was gathering and educating themselves on feline nutrition and cat food brands (in the previous phase), but now becomes more discriminate.

For cat owners, selection criteria is a blend of both the tangible and intangible. The tangible being things like actual product attributes e.g. dry, single-protein, organic meat source, etc. and the intangible being things such as the reputation of the brand, or the perceived personality of the brand.

When most people recall their selection criteria, they tend to focus on the tangible, but in reality are heavily influenced by the intangible.

A product that meets all tangible criteria may still not end up in the shopping basket if the brand itself doesn't resonate. And a product that does meet the intangible criteria and resonates highly may also make it into the basket, despite lacking desired product attributes. People who have bought a product simply because the cat on the pack resembles their own are examples of this.

The limitations of people's short term memory constrains the number of criteria that can be held in the mind at any given time. Whilst the actual number varies depending on the person and the situation, most often people work from a list of criteria of 5-6 product attributes. Each of these attributes have a level of importance assigned to them.

One challenge for the owner is that their criteria list rarely remains static; it can change as they discover new information, as their emotions and motivations change and as the context of their situation changes.

And even when criteria remains the same, the importance assigned to each attribute can vary. Some initial criteria thought of as a 'need' may be relegated to a 'nice to have' and be an acceptable trade-off later on.



Ultimately for many, determining selection criteria can best be described as informed guesswork (with one main area of focus e.g. taste, science-driven, or even fun), as most don't have the time or mental bandwidth to fully explore all the attributes available to them, and distil them into a truly considered hierarchical list. And unfortunately, few brands are attempting to ease this cognitive weightlifting.

The second step, identifying brands that meet the criteria will also have begun passively as the owner was 'in discovery' mode' but now becomes more active. The rule to note here is that at this stage, perception is everything.

Engaged with their Ecosystem of Influence in search of inspiration and information, most owners are exposed to brands which have immediate resonance as a result of meeting some of their initial criteria. Some highly resonant brands may have even helped shape the criteria.

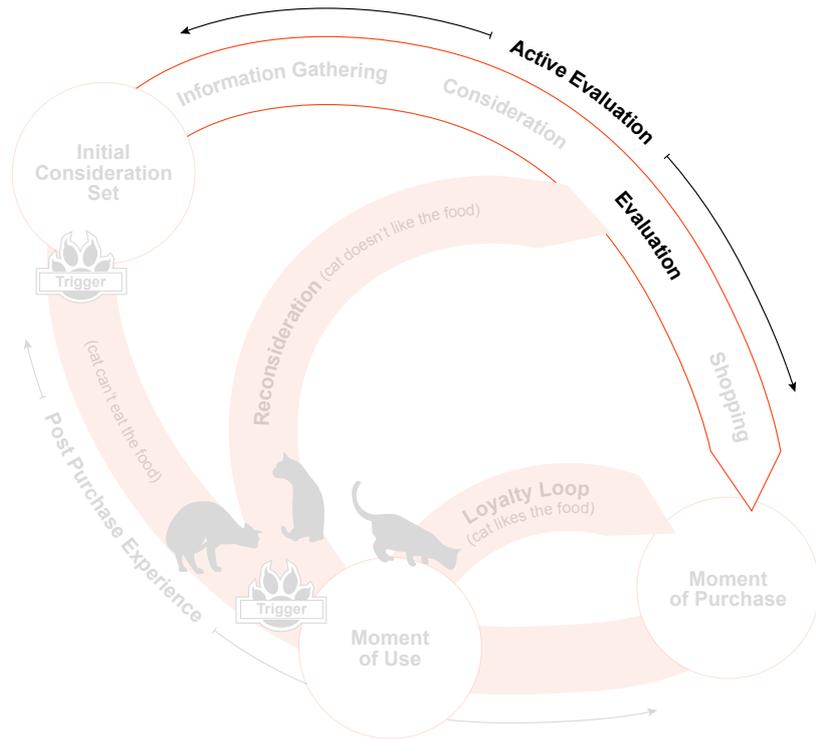
However, when the objective becomes finding the 'best option', most owners undertake a more active and focused search for the brand and product they perceive will meet all, or at best most, of their selection criteria. Driven again by their original Ecosystem of Influence, but also potentially evolving it by adding new sources (community forums, online retailers, review sites, nutrition advisors etc.) they will seek out brands that align with their newly determined needs, wishes and wants

The number of brands who make it into consideration at the end of this step can be ten times the number in the Initial Consideration Set, which makes the upcoming 'evaluation of options' stage no mean feat.

To deliver on needs, wants and wishes brands need to:

- **Understand how people determine selection criteria, and how this changes over time**
- **Understand how emotion, situation, motivation impact a set of criteria**
- **Identify the different types of criteria, tangible and intangible**
- **Understand how people value different criteria; the process they go through to assign value**

Active Evaluation / Evaluation



CDJ Model - AE Evaluation

How inconsistency impedes effective evaluation.

Similar to Consideration, the Evaluation phase is a separate and distinct part of the journey but the process of evaluating options also happens (often subconsciously) in earlier phases.

For most people, the evaluation of different options would have occurred in some form simultaneously and iteratively during both preceding phases as they were exposed to new information, brands, products and their related attributes. However, as they attempt to narrow down a considerable number of options, true active evaluation commences.

The process people use to evaluate options can differ, but most tend to compare options individually and sequentially, rather than together. They look at each individual option, making an overall judgement about it, (whether it meets their criteria and to what degree), before moving on to assess and evaluate the next option.

The challenge presented by this approach is that most people are unable to hold such a large amount of information about so many brands in their heads at one time, and end up having to go back later to compare any given option against another.

A study by Harvard looking at how people make decisions identified that people make the best decisions when they evaluate options together. When they are able to see the attributes of each of the products side by side and measure how effective each product is against both the selection criteria and the competition.

Unfortunately the cat food category makes this type of evaluation nearly impossible as there is little synchronicity in either the way foods are positioned or how the details of the food are presented (both on pack and in communications). Even retailers (both physical and online) show and rank products in different ways, under different sub-categories and even those who follow some sort of standardised approach, lack a comparison mechanism to help someone assess one product against another.

In the absence of a portal that holds all known information about each brand and product with a sophisticated filtering system around a standardised set of criteria, the way in which someone evaluates options varies. Most lean into their Ecosystem of Influence, but their choice of who and what they turn to within their ecosystem can severely bias them for, or against an option.



Furthermore, the level of detail they're willing to go into when evaluating an option can impede their progress later in the process. It's all too easy to imagine the frustration and disappointment felt when someone feels they have identified a suitable option only to later discover in the Shopping phase that a specific format or flavour isn't available or they come face to face with a raft of negative product reviews.

Another challenge for people trying to evaluate options can come in the way brands interpret and communicate different attributes. One example being the use of the term hypoallergenic. In its broadest sense it can mean one single protein source, and in its narrowest sense it means a protein broken down sufficiently so as to pass unnoticed by the cat's digestive system.

Some brands with only turkey as its protein source refer to their food as hypoallergenic but for a cat sensitive to turkey, the food is far from hypoallergenic. If an owner has been advised by a vet to feed their cat a true hypoallergenic food, many non-prescription foods labelled as hypoallergenic won't be suitable. The absence of clear, universally employed descriptions of attributes adds to the complexity of the task.

Often, by trying to better understand the different attributes of different products, or by trying to evaluate one option against another, people stumble across entirely new brands and products which then compete for their attention. In some cases, even replacing options they're already considering.

And when the issue of availability rears its head, even carefully evaluated options can be deprioritised and even removed from the consideration set in favour of others as trade-offs in criteria begin to occur.

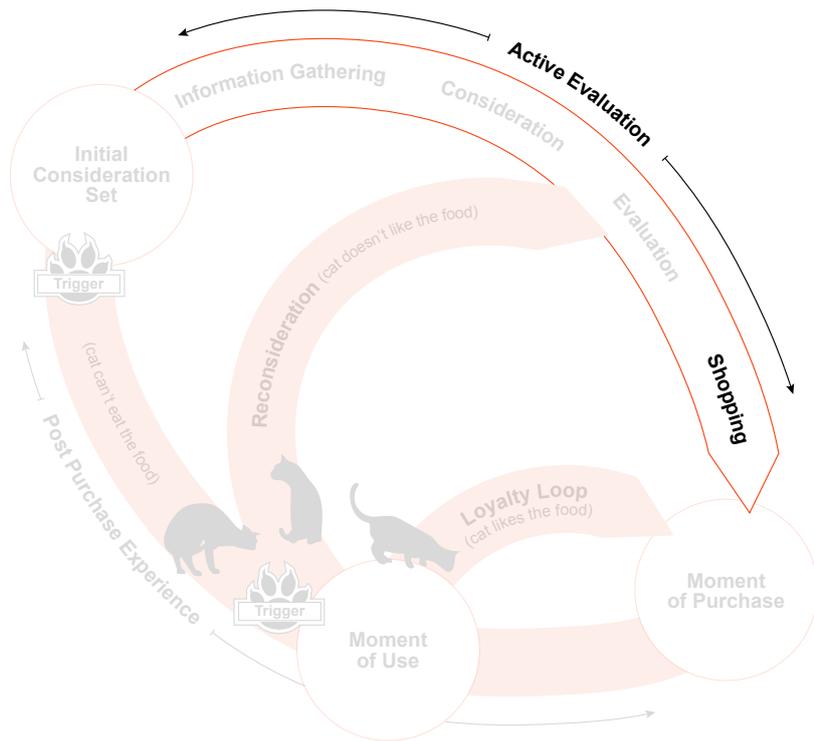
In the absence of clear comparison data (except for price), or confusion around ingredients and attributes, people tend ultimately to lean towards brands that created an emotional connection with them, ones they formed a positive attitude towards during the information gathering and consideration phases.

This can be either great or terrible news for brands depending on how well they've engaged with the cat owner up to this point.

To make it into the final consideration set the brand needs to:

- **Understand the different processes and tools people use to evaluate options**
- **Identify the roles people, platforms, brands and media play in the evaluation of options**
- **Understand the biases at play in evaluating options and how these can positively or negatively impact an option, looking for opportunities for the brand to overcome them**
- **Identify which tangible and intangible criteria are primary (must haves) and which are secondary (open to trade-offs) and how these change during the evaluation process**
- **Identify which brands and products are within an evaluation set, why they are in it and how they perform against the primary and secondary criteria relative to own brand**
- **Understand how effective branding, communications, packaging and point of sale marketing are at generating an emotional connection, clearly communicating product attributes and educating on the importance of attributes not shared by the competitive set**

Active Evaluation / Shopping



CDJ Model - AE Shopping

How shopping is a promiscuous and polygamous affair.

By the time most cat owners reach the shopping phase, they have a limited number of options in mind, and almost always a preferred choice. It's not always what ends up in the bowl in the Moment of Use.

The shopping phase itself can create friction and several pain points, as it can be disrupted by a number of factors including availability, price and point of sale advertising or an alternative recommendation.

Many cat owners have a preferred shopping channel (where they shop) and retailer (who they shop with) that they default to; depending on the experience that best fits their needs, and the availability of their chosen food. Each channel provides its own distinct experience and associated benefits, with most owners adopting some form of multi-channel shopping in their efforts to secure their cat's food.

For example, even those owners who prefer the social and community aspect of visiting specialist stores, enjoying the interaction with other pet owners, as well as access to specialists in cat food (people who can give recommendations and/or provide validation of the

preferred choice) often value the convenience and ease of shopping online.

The COVID-19 driven acceleration of online channels, proliferation of D2C channels and rise in the number of subscription-based pet food services for both mass and premium brands has demonstrated how significant (and long-term) this shift towards convenience and indeed hybrid shopping behaviour is likely to be.

Pet food became Amazon Prime's sixth largest category in June 2020

What's interesting about the shopping phase (despite having a preference at the start) is just how unpredictable, polygamous and promiscuous people can be when it comes to channel, retailer and ultimately the brand and



product in their mind.

This is particularly evident when it comes to availability or price.

When in search of a product that is deemed most likely to be a success, some cat owners will happily jump from retailer to retailer, switching between physical and online, determined to acquire it at a price that is deemed good value for money. And in some cases, when faced with limited distribution (e.g. can only find the brand in independent retailers) they will even go out of their way to find a stockist.

Others, when faced with a lack of availability, or a lack of value, after a little shopping around (or even none at all), can easily disregard both the product and other products within the brand, moving to a second preferred option with barely a second thought.

And even when the first option is available, and at a good price, for some people a well placed and resonant communication or recommendation of an unknown third option can interrupt their shopping process and send them off in an entirely different direction.

The strength with which a brand has secured its position in the owner's heart and mind will dictate the lengths they will go to acquire the product, how likely they are to default to another product but stay within the brand, and how resistant they are to other brands(considered or brand new).

Ultimately, if someone can't find what they want (e.g. lack of availability or exact format doesn't exist), if what they want becomes less appealing (e.g. more expensive or has negative reviews) or something else appeals more (e.g. a POS advertisement triggers a different interest), channel, retailer and brand are all vulnerable to being replaced.

And finally, not all shopping results in a Moment of Purchase.

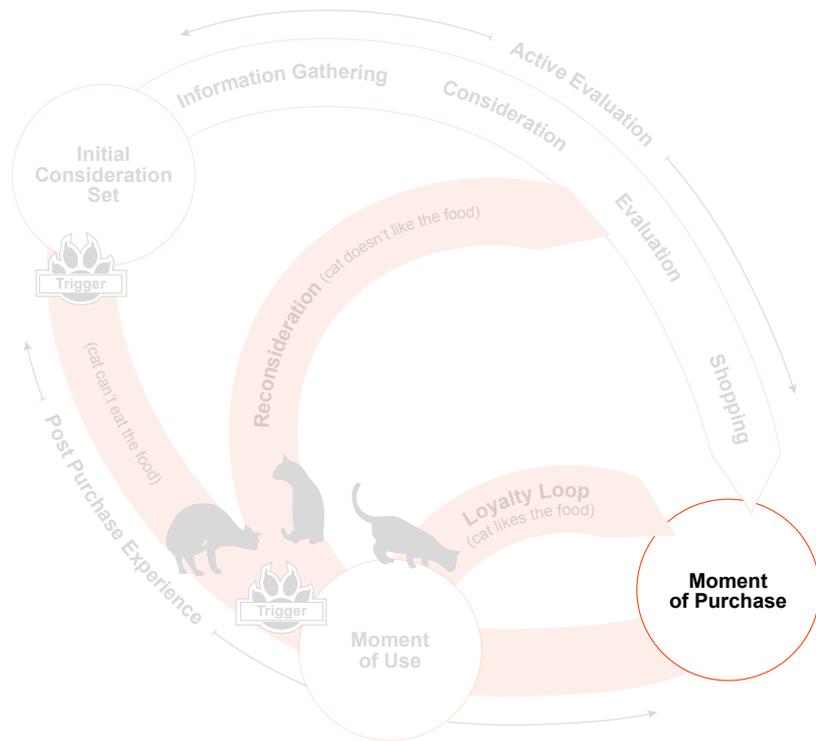
As the impact of COVID-19 continues to wreak havoc on manufacturing and supply chains, and many products are out of stock or no longer available, people are being forced to abandon their first choice and either default to a second choice, or head back into evaluating other options.

The preferred choice at the start of the shopping phase may not be the choice at the Moment of Purchase, and the shopping experience itself can differ greatly on any given day.

To be in the basket at the moment of choice brands need to:

- **Understand the shopping preferences (channels and retailers) and the relationships that exist between them**
- **Identify the moments of friction and pain points in the shopping experience and how they impact attitudes and behaviours towards a brand**
- **Understand the channels people use and why they use them up to and including the Moment of Purchase**
- **Identify opportunities to engage and nurture loyalty during the shopping phase to prevent defection at a pain point**
- **Identify which channels need to be integrated seamlessly to meet expectations of an omni-channel experience**
- **Understand the different levers that can be used to help incentivise people to complete a purchase (financial and emotional)**

Moment of Purchase



CDJ Model - Moment of Purchase

How buying is only the beginning.

When a decision to purchase has been made at the end of the Shopping phase, people want to be able to buy their cat's food easily and feel like they've got a good deal.

It's the moment the first seeds of potential loyalty are sown and the moment people's expectations are at their highest.

Some brands play an active role in the Moment of Purchase, recognising that this experience will inform how people perceive the brand (now and in the future), and even potentially frame expectations for the category as a whole. These brands, intent on reinforcing that the decision is a good one, do everything they can (via retailers or their own e-commerce channel) to reduce the friction between decision and Moment of Purchase; everything from offering first purchase discounts to promoting customer reviews and recommendations.

Which is important because the Moment of Purchase (or the split second after the transaction is complete) is the moment a cat owner begins to reflect on their decision and whether it has been the right one.

The moment they're filled with hope and anticipation, eager to believe all the hard work of identifying and evaluating options, tracking down the right one, and finding the best place to buy it has been worthwhile.

And yet, whilst the Moment of Purchase is a key moment, it's not the defining one.

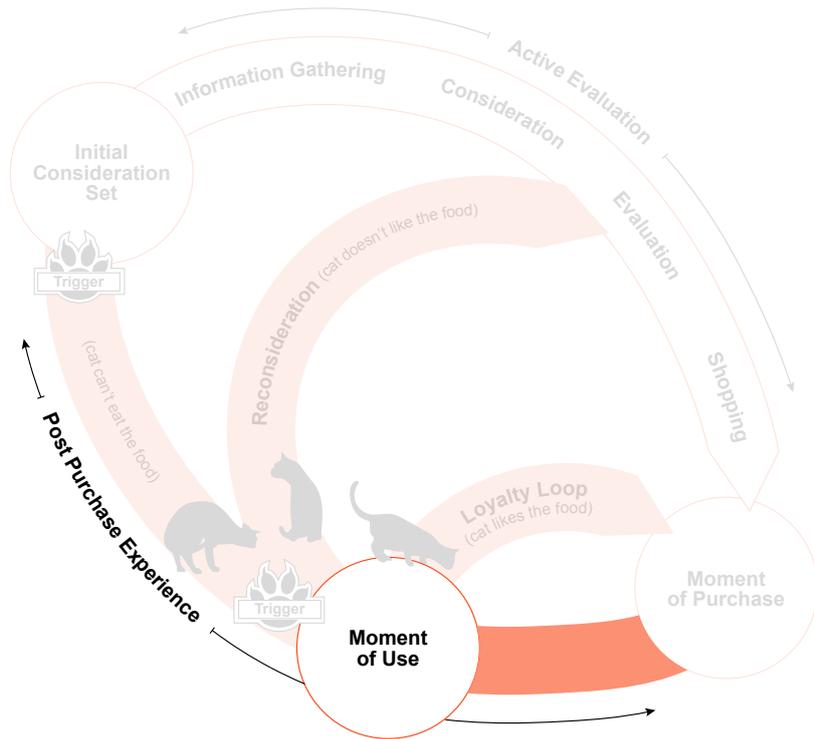
That comes in the Moment of Use. The moment when the real decision maker declares the decision a success or failure.



To reinforce the right decision has been made brands needs to:

- **Understand the mindset and emotions of at the Moment of Purchase**
- **Identify the different emotional need states the brand can support (confidence, relief, reassurance, anxiety, hope, etc.)**
- **Understand where final purchasing behaviour takes place (channel and retailer) and why they were the chosen ones**
- **Understand who receives the emotional equity after a successful purchase (retailer or brand) and why**

Moment of Use / Post Purchase Experience



CDJ Model - MOU Post Purchase Experience

How the cat determines the validity of the choice.

The Moment of Use is the pivotal moment in the cat food decision making journey.

It's the moment when the true decision maker makes their feelings known about whether the choice was a good one or not. Unlike in other categories where the purchaser is also the user, in the case of cat food, it's the user who is the ultimate arbiter of success.

No matter how much energy and time has been invested in trying to source a food that the cat will eat, the true test is when the cat is faced with the food and determines for themselves whether they deem it palatable. What makes this tricky for any owner is realising that what constitutes palatability for each individual cat is a complex combination of a number of different factors and that can change without warning. For example, a cat that has previously adored eating a food rich in sauce can overnight change their preference to one in jelly.

The Moment of Use has three potential outcomes depending on how the cat reacts to the food; if they eat it and continue to eat it, if they refuse to eat it, or if they end up in a situation where they can no longer eat it.

Each reaction triggers a different next-step by the owner; either entry into a loyalty loop, a trip back into the evaluation phase to reconsider alternative options (the 'reconsideration route') or having to begin a new decision making journey based on new criteria.

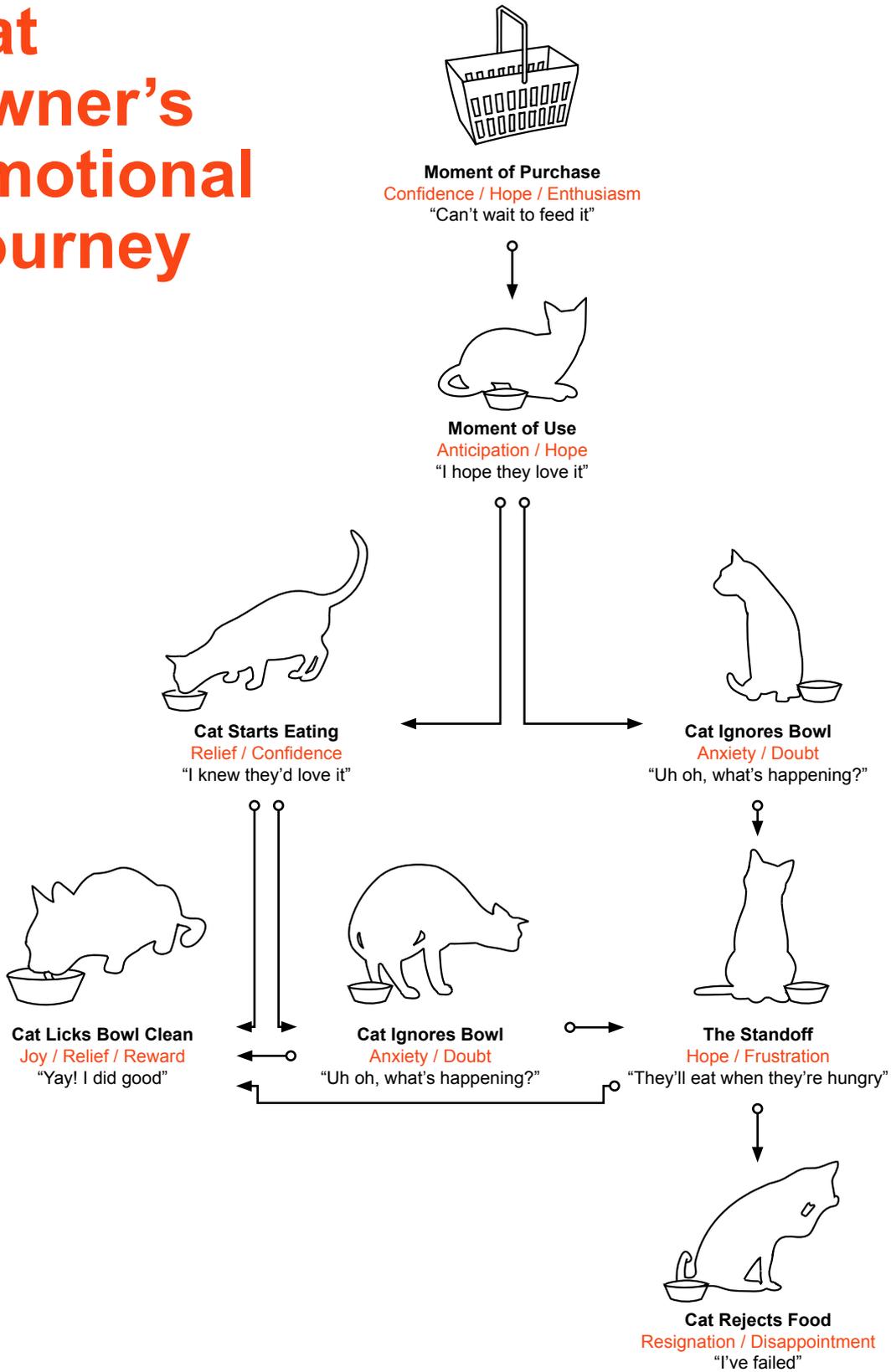
Each of next-step comes with an emotional response and a new set of expectations which is why most owners are desperate for their cats to like a choice and to continue to like it.

The owner's emotional journey through the Moment of Use can be something of a roller coaster. Knowing that a cat can starve themselves if they don't like the food available (even when presented with multiple options) and that them doing this for more than just a couple of days can result in a serious threat to their health adds a layer of emotional vulnerability to the experience.

It's not an understatement to say most people wait with anxious, bated breath as the bowl goes down in front of the cat.

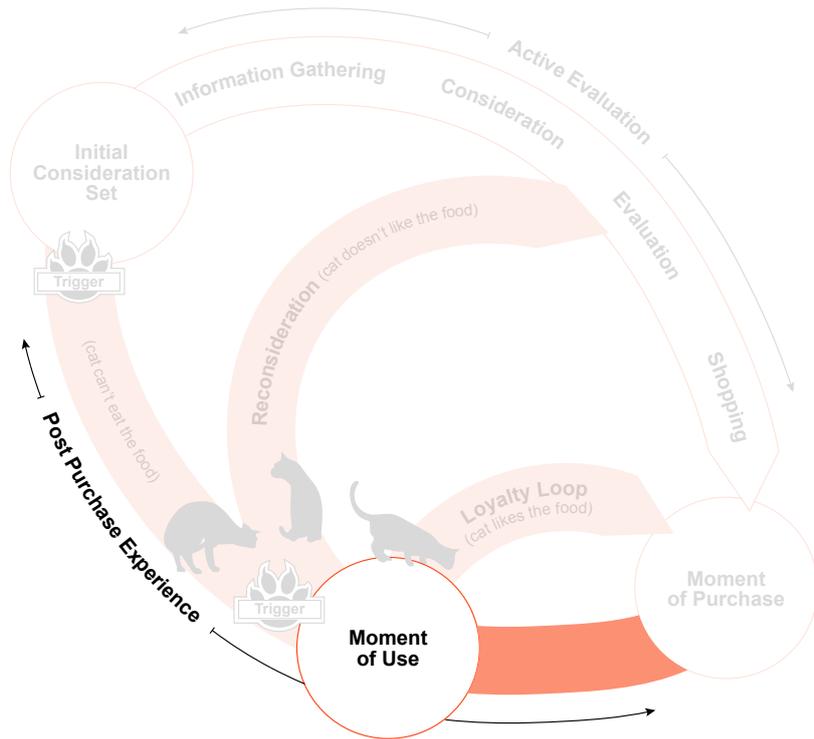


Cat Owner's Emotional Journey



The Emotional Journey of a Cat Owner

Moment of Use / Behaviour at the Bowl



CDJ Model - MOU Behaviour at the Bowl

How the cat determines the validity of the choice.

When it comes to palatability, the way cat owners assess a food's performance is no longer limited to whether they eat it or not.

How they judge a food's success and its related palatability is based as much on whether they appear to be enjoying the food, as it is on whether they've licked the bowl clean. People want to see clear signs that their cats are appreciating the food, much like themselves when they eat a good meal.

Given a cat's body language and their behaviour at the bowl can strongly influence their owner's perception of whether their choice is a good one, French pet food company Panelis embarked on a dedicated study in 2019 to understand how people perceived their pet's reaction to a food.

The study found 16 consistent behaviours across the entire feeding ritual (before, during and after eating) and each was assigned a positive or negative value, indicating whether the cat was enjoying the food and whether the choice was a success or not.

These interpreted behaviours were analysed alongside data captured on the amount of food consumed and the consistency of consumption. What they found was that most owners are exceptionally good at interpreting their pet's behaviour, and extrapolating it to determine whether they had made a good choice (success) or a bad one (failure).

This adds an interesting dimension to how people view the success of a decision making journey and influences their future purchasing behaviour.

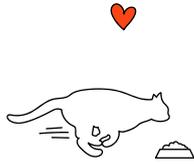
Source Diana Pet Food 2020



Before the Meal

During the Meal

After the Meal



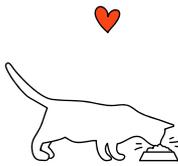
Runs to the bowl



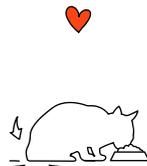
Eats some kibble and stops



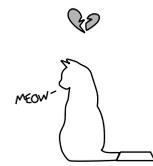
Licks their lips



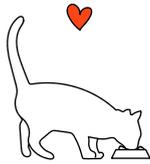
Sniffs first



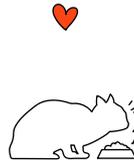
Sits down when eating



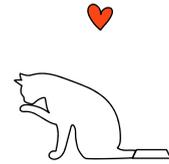
Meows



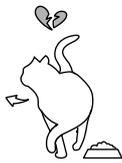
Starts eating immediately



Keeps raising its head



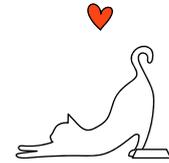
Grooms itself



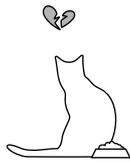
Refuses to eat



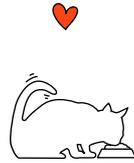
Eats calmly



Stretches



Hesitates before eating



Eats voraciously

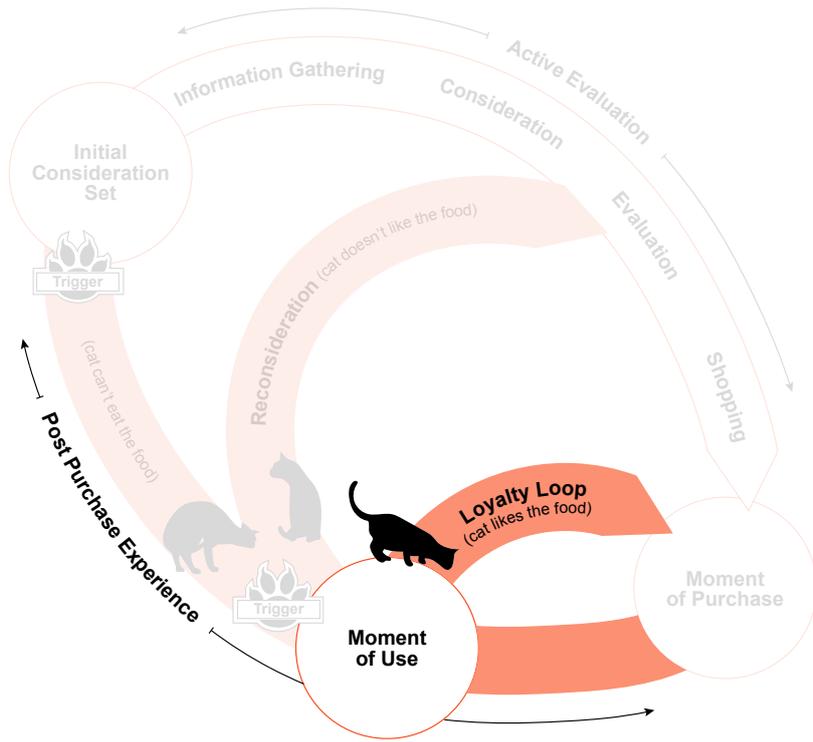


Sleeps



Head in the bowl until the end

Moment of Use / The Loyalty Loop



CDJ Model - MOU The Loyalty Loop

When the cat likes and consistently eats the food.

At the Moment of Use, if a cat immediately starts eating and continues to eat the food, whilst displaying behaviours consistent with enjoyment, most people breathe a giant sigh of relief.

Having gone through the emotional and mentally taxing journey (sometimes more than once) of trying to find a food that their cat will both eat and appreciate, witnessing evidence of its success is a significant moment for any owner.

They're filled with feelings of relief, joy and an inner voice declaring victory. They feel validated in their choice and, in many cases, have positive feelings towards the brand that has made this moment possible.

If the journey has been a particularly difficult one, or one that has had to be repeated a number of times, there can also be a sense of 'brand gratitude' that can help form the foundation of lifelong affinity and advocacy.

Given the fickle nature of cats appetites and food preferences, and the number of potential diet-related or diet sensitive health issues, the chances of an owner

having to repeat the decision making process in the future are significant. If a brand can establish itself (both mentally and emotionally) as the go-to brand in those instances, forming a strong bond with the cat owner; whilst the choice of product may change, there is a strong likelihood they will still stay in-brand.

Most cat owners experiencing a positive and consistent Moment of Use with a new food will become loyalists simply by virtue of having found a solution that works. Knowing the chance of failure is reasonably high, sticking with a food that works can create a default Loyalty Loop, irrespective of how much affinity they feel for the brand.

It's why it's incredibly important for brands to understand which of the two types of Loyalty Loops owners are likely to move into (passive and active) and focus retention and engagement strategies on converting the former and supporting the latter.

Cat owners who become Passive Loyalists are mostly driven by convenience; they're happy they've found a food the cat likes and want to maintain the status quo. As a result they enter into a Loyalty Loop (habitual purchasing



pattern) driven mostly by a desire to avoid engaging in any further decision making, rather than out of any commitment to a brand. Passive Loyalists are open to switching if given enough reason or incentive. Passive Loyalty is simply the loyalty of convenience.

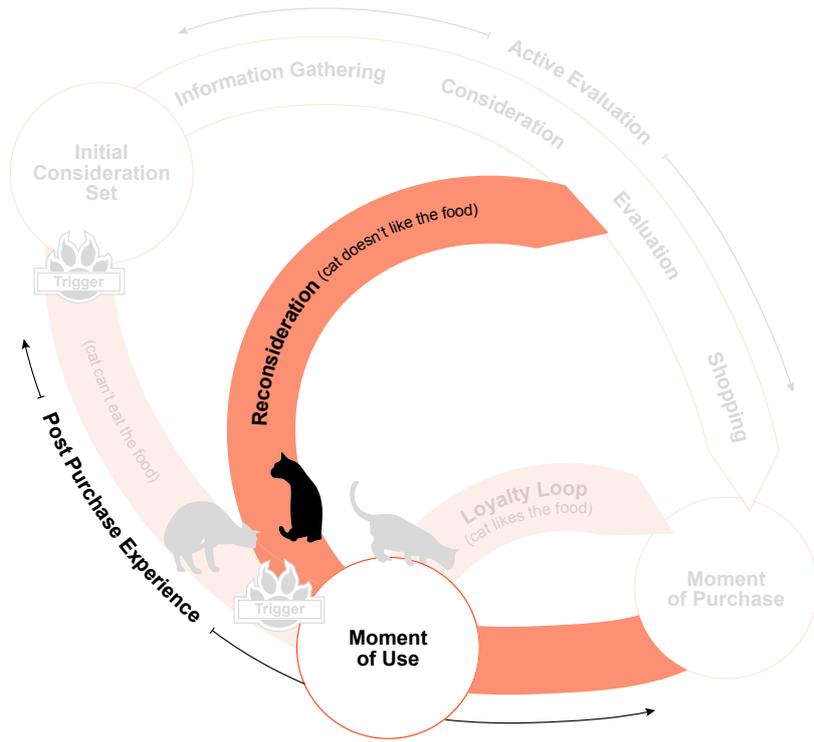
Cat owners who become Active Loyalists are mostly driven by love of the brand; not only are they happy they've found a food the cat likes but they also feel a strong emotional attachment to the brand. They enter into a Loyalty Loop of their own, but it's one driven by a commitment to, and alignment with the brand. Some owners feel strongly that the brand has supported them in their moment of need, and in some cases when the situational context is extremely emotionally charged (e.g. if their cat hasn't eaten for days) can feel the brand has 'saved' them.

Cat owners who are Active Loyalists enjoy engaging with the brand, become advocates for it and over time can form a deep bond with it. It's why when they look for a potential second food or treat, or when a new trigger moment occurs, they will look within the brand portfolio and resist the draw of the competition. Active Loyalty is the loyalty of belief.

To build effective retention strategies the brand needs to:

- **Understand what forms cognitive and behavioural dependency on a brand**
- **Identify the routes to the formation of each type of loyalty; what the roadmap for each looks like and the role the brand plays in creating each type**
- **Understand what people think, feel and do in each type of loyalty and at different stages in the Active Loyalty Loop (enjoy / advocate / bond)**
- **Understand how the brand goes beyond the transactional to deliver intrinsic value for Active Loyalists**
- **Identify the values and beliefs of Active Loyalists and how the brand can speak to them consistently over time**
- **Understand the drivers and potential disruptors of habit formation for Passive Loyalists**

Moment of Use / The Reconsideration Route



CDJ Model - MOU The Reconsideration Route

When the cat refuses the food.

At the Moment of Use, if a cat rejects the food, or even starts eating it but then stops, most owners begin to get a sinking sensation in their stomachs. The initial feelings of hope and anticipation disappear as anxiety, doubt, and eventually frustration and disappointment take their place.

If this Moment of Use isn't the first experience of a food refusal and is a continued pattern of behaviour by the cat, the feelings of frustration and disappointment can amplify. And in the case of an owner whose cat hasn't eaten for days, with the situation fast becoming critical, they can quickly escalate to fear, desperation and despair.

People who experience these unsuccessful Moments of Use often feel a sense of failure and are filled with regret. They reflect on their experience as one where time, energy and money have been wasted and their cat still hasn't eaten.

What's interesting is how little or much the brand is considered at this point.

Some take a fatalistic view; believing they have fallen

victim to the trial and error cycle that is finding a food their cat will like and despite their best guess, it just didn't work.

Others turn the blame inwards; believing they made an error in their decision making process, such as overlooking a key criteria, trusting an unreliable source or not doing enough homework.

And some turn the blame towards the brand; believing the brand has let them down, has provided them with a poor quality or unsuitable food despite all of its promises.

How people respond in this moment can have a big influence on which brands make it into the secondary consideration set.

This unsuccessful Moment of Use forces the owner back into Active Evaluation. Which phase they enter tends to depend on how much time they spent exploring the category and how big their final consideration set was.

Some people who already have a second choice will re-enter the journey in the Shopping phase, already knowing what they're going to get and focus simply on acquiring it.



Others who may have raced through the initial journey may need to spend more time exploring the category and identifying options.

However, most people, rather than need to revisit the category and journey as a whole, or if their criteria haven't changed, will head back into the Evaluation phase to reexamine their options looking for a next-best alternative. We've called this shortcut back into Evaluation the Reconsideration Route.

How people view a brand's involvement in their initial choice will inform whether they default to an alternative within the brand portfolio (brand preference), consider the brand as well as competitors (brand ambivalence) or whether they actively avoid the brand (brand avoidance).

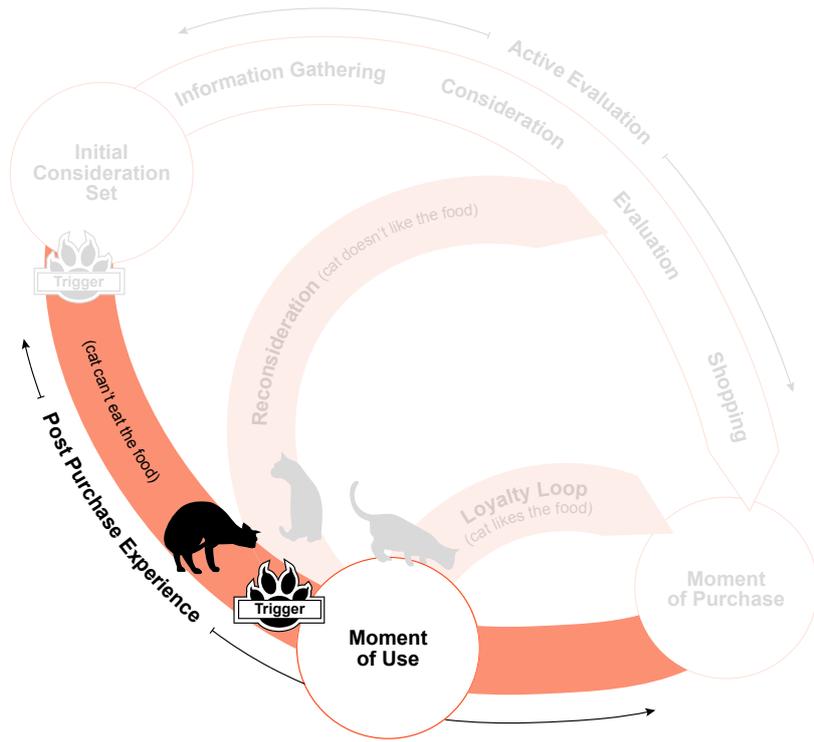
No cat owner wants to re-enter the decision making journey. Most will have some form of negative emotion ranging from simple frustration to panic-driven despair and all will place higher expectations on their second choice.

One important thing to note is that a food refusal at the Moment of Use can also occur after a period of eating the first choice food; if the cat loses interest in it or develops an aversion to it. The phase of Active Evaluation the owner defaults to and whether the incumbent brand will influence the next choice is likely to be informed by the length of time the cat has eaten the initial food, the length of time of the owner has been out of the decision making journey, and the relationship (type of loyalty) the owner has with the current brand.

To keep the cat owner within the portfolio the brand needs to:

- **Understand the different emotional and cognitive responses people experience at the point of refusal**
- **Understand how responses differ according to situational context and number of times they experience the refusal**
- **Understand how people view the role of the brand at the point of refusal**
- **Understand how people view their own decision making at the point of refusal**
- **Identify which stage of the journey people default to post-refusal and what drives choice of route**
- **Understand the different motivations driving re-entry into the decision making journey and how this affects selection criteria and potential trade offs**
- **Understand the different ways passive and active loyalists experience and navigate the Reconsideration Route**

Moment of Use / A New Trigger



CDJ Model - MOU a New Trigger

When a cat can no longer eat the food.

Unfortunately for some owners, even if their cat is happily enjoying their choice of food and showing deep appreciation for it, a trip back into the decision making journey may be inevitable.

Some cats can be sensitive to certain ingredients, have unknown allergies or develop a health condition that is either diet related or needs to be diet controlled. In these cases, the cat may be perfectly happy eating the food, but the food is no longer suitable for them and needs to be changed.

Depending on how severe this secondary trigger is informs not just the action the cat owner needs to take but where in the decision making journey they need to return to.

If a cat has an upset stomach after repeatedly eating a usual food in a different flavour - in the case of Maine Coons a mouthful of beef protein can upset the litter tray - the owner may simply head back into the Shopping phase, staying with the same brand and product and simply seeking to switch out the offending flavour for an alternative.

They may also head back into Active Evaluation looking at other options both within the brand portfolio and outside of it that they perceive to be more suitable. For example, a different type of food by the same brand or even a similar food by a different brand.

However a new decision making journey is likely to be needed if the food sensitivity becomes severe, if the cat develops an allergic reaction to a specific allergen within the food (often protein but not exclusively so) or in extreme cases where the cat develops a health condition that needs to be either supported or treated by a specific diet (IBD, kidney issues etc.).

When this happens, most owners find themselves at their most vulnerable and helpless as they feel everything from anxiety to fear about what it means for their pet, their relationship and their future together.

This kind of trigger and disruptive event causes a new decision making journey because the criteria for what constitutes a good and healthy food for their cat has completely changed. Previous alternatives are no longer suitable, and in many cases any brand that doesn't cater



specifically to the challenge at hand will be disqualified from consideration.

In such scenarios, finding information, support, guidance and a set of potential options quickly is key for any owner, as whilst they may be led by a vet's recommendation (and in many cases it can result in a successful switch), a refusal in the Moment of Use may mean they have to look elsewhere.

For example, owners of cats needing a true hypoallergenic food* (where the proteins are sufficiently broken down so as to pass unnoticed by the digestive system) have very few choices. The most suitable options are prescription diets offered by vets, but many owners find themselves with a cat hellbent on starvation when given a bowl of it due to its lack of palatability.

Faced with a cat with a health condition that won't eat is one of the worst situations a person can find themselves in. It's a situation where most owners will turn to the internet in search of help, and may entertain the idea of a completely different diet (e.g. raw, novel proteins, fresh)

A brand able to solve the problem and support the owner beyond the food itself (emotionally and practically with advice), may occupy the place of 'saviour' in the owner's heart and mind.

Whatever the reason the cat can no longer have the food, the resulting decision making journey the cat owner has to go on is never optional and is rarely simple or straightforward.

Trust is never more important to a cat owner when faced with this kind of decision making journey. Trust that the information and advice they receive is accurate, trust that the product will deliver against their new criteria and trust that the brand has the wellbeing of their pet as their primary objective.

**Unregulated use of the term hypoallergenic has led to its use on foods that are not strictly hypoallergenic to the cat e.g. a product containing a single protein can still cause an allergic reaction if the cat is sensitive to it, whereas a true hypoallergenic food would contain a hydrolysed protein.*

To keep the cat owner within the portfolio the brand needs to:

- Understand the emotional and cognitive responses people experience with each new trigger event (against each potential trigger)
- Identify where in the journey people default to if the trigger event is low-impact (e.g. reaction to specific flavour of food or type of protein)
- Identify the path to a new journey if the trigger event is high-impact (e.g. health related)
- Understand the emotional and cognitive support owners need (and actively look for) with each trigger event
- Identify perceptions of, and attitudes towards the brand with each trigger event

Irrespective of how someone enters the decision making journey or the number of times that they enter it, one thing remains true - control is firmly in the cat owner's hands.





So what... Opportunities!

For a brand to become the brand of choice, they need to be visible, resonant and highly relevant before, during and after the decision making journey has taken place.

They need to know how to engage with, empower and ultimately influence decision making in their favour at every stage of the journey.

By truly understanding the decision making journey you can identify key moments of opportunity for the brand; understand what the need is, who the influencers are in that moment and how the brand needs to show up and behave in each of those moments.

Triggers

To be empathetic and empowering when a trigger occurs the brand needs to:

- Identify all the different triggers (inflection and disruption) and the emotional response at the point of trigger
- Understand how each trigger's corresponding emotions impact the way people enter and experience the journey
- Understand the relationship between trigger, emotion and people's initial motivations for beginning the journey
- Understand the emotional and cognitive support owners need (and actively look for) at a trigger event
- Understand how the brand is perceived at each trigger event

Initial Consideration Set

To make it into a cat owner's initial consideration set the brand needs to:

- Understand how the brand shows up, and its level of resonance during passive exposure
- Understand the roles advertising, media and content sources play in shaping an ICS
- Understand the role retailers and other distribution channels play in shaping an ICS
- Understand the roles advertising, media and content sources play in shaping an ICS
- Identify initial selection criteria brands are being subconsciously stress tested against to enter an ICS
- Understand how much of a preference is given to brands within an ICS as they move to Active Evaluation



Active Evaluation: Information Gathering

To influence choice during the exploration phase the brand needs to:

- Understand who and what form the Ecosystem of Influence for the owner before the trigger event
- Understand people's beliefs about the category and their path to belief formation
- Identify the people, platforms, media and brands that form the expanded Ecosystem of Influence in the Information Gathering stage
- Identify the different Information Gathering need states (inspiration, information, evaluation, validation) and the accompanying emotions
- Understand which part of the Ecosystem people lean into in each need state and where ZMOT's occur
- Identify the moments that matter most (pain points / wish moments) where the brand can play a meaningful role in addressing needs, emotions and wishes

Active Evaluation: Consideration

To deliver on needs, wants and wishes brands need to:

- Understand how people determine selection criteria, and how this changes over time
- Understand how emotion, situation and motivation impact a set of criteria
- Identify the different types of criteria, tangible and intangible
- Understand how people value different criteria; the process they go through to assign value
- Understand how needs, wants and wishes appear within a person's mindset, and how these evolve over time (and situational change) to become acceptable trade-offs
- Understand pain points and cognitive load associated with the determination of selection criteria and identify opportunities to add ease and efficiency
- Understand how brands influence selection criteria and the associated value given to the brand
- Understand where the brand shows up and how it is perceived

Active Evaluation: Evaluation

To make it into the final consideration set the brand needs to:

- Understand the different processes and tools people use to evaluate options
- Identify the roles people, platforms, brands and media play in the evaluation of options
- Understand the biases at play in evaluating options and how these can positively or negatively impact an option, looking for opportunities for the brand to overcome them
- Identify which tangible and intangible criteria are primary (must haves) and which are secondary (open to trade-offs) and how these change during the evaluation process
- Identify which brands and products are within an evaluation set, why they are in it and how they perform against the primary and secondary criteria relative to their own brand
- Understand how effective branding, communications, packaging and point of sale marketing are at generating an emotional connection, clearly communicating product attributes and educating on the importance of attributes not shared by the competitive set

Active Evaluation: Shopping Experience

To be in the basket at the moment of choice brands need to:

- Understand the shopping preferences (channels and retailers) and the relationships that exist between them
- Identify the moments of friction and pain points in the shopping experience and how they impact attitudes and behaviours towards a brand
- Understand the channels people use and why they use them up to and including the Moment of Purchase
- Identify opportunities to engage and nurture loyalty during the shopping phase to prevent defection at a pain point
- Identify which channels need to be integrated seamlessly to meet expectations of an omni-channel experience
- Understand the different levers that can be used to help incentivise people to complete a purchase (financial and emotional) experience
- Understand the different levers that can be used to help incentivise people to complete a purchase (financial and emotional)

So what... Opportunities!

Moment of Purchase:

To reinforce that the right decision has been made brands need to:

- Understand who and what form the Ecosystem of Influence for the owner before the trigger event
- Understand people's beliefs about the category and their path to belief formation
- Identify the people, platforms, media and brands that form the expanded Ecosystem of Influence in the Information Gathering stage
- Identify the different Information Gathering need states (inspiration, information, evaluation, validation) and the accompanying emotions
- Understand which part of the Ecosystem people lean into in each need state and where ZMOT's occur
- Identify the moments that matter most (pain points / wish moments) where the brand can play a meaningful role in addressing needs, emotions and wishes

Moment of Purchase: Loyalty Loop

To build effective retention strategies the brand needs to:

- Understand how people determine selection criteria, and how this changes over time
- Understand how emotion, situation and motivation impact a set of criteria
- Identify the different types of criteria, tangible and intangible
- Understand how people value different criteria; the process they go through to assign value
- Understand how needs, wants and wishes appear within a person's mindset, and how these evolve over time (and situational change) to become acceptable trade-offs
- Understand pain points and cognitive load associated with the determination of selection criteria and identify opportunities to add ease and efficiency
- Understand how brands influence selection criteria and the associated value given to the brand
- Understand where the brand shows up and how it is perceived

Moment of Purchase: Reconsideration Route

To keep the cat owner within the portfolio the brand needs to:

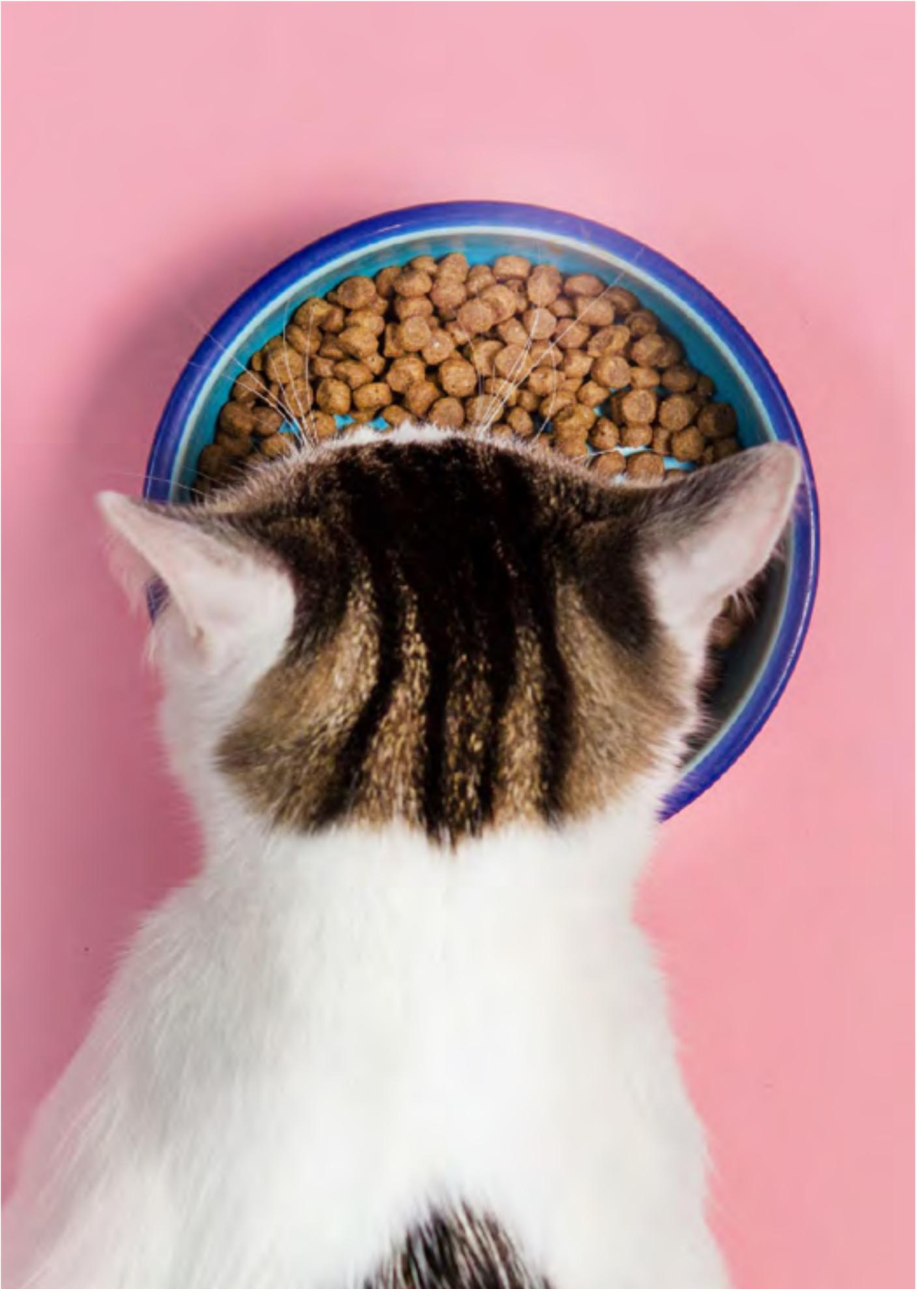
- Understand the different processes and tools people use to evaluate options
- Identify the roles people, platforms, brands and media play in the evaluation of options
- Understand the biases at play in evaluating options and how these can positively or negatively impact an option, looking for opportunities for the brand to overcome them
- Identify which tangible and intangible criteria are primary (must haves) and which are secondary (open to trade-offs) and how these change during the evaluation process
- Identify which brands and products are within an evaluation set, why they are in it and how they perform against the primary and secondary criteria relative to their own brand
- Understand how effective branding, communications, packaging and point of sale marketing are at generating an emotional connection, clearly communicating product attributes and educating on the importance of attributes not shared by the competitive set

Moment of Purchase: Secondary Trigger

To keep the cat owner within the portfolio the brand needs to:

- Understand the shopping preferences (channels and retailers) and the relationships that exist between them
- Identify the moments of friction and pain points in the shopping experience and how they impact attitudes and behaviours towards a brand
- Understand the channels people use and why they use them up to and including the Moment of Purchase
- Identify opportunities to engage and nurture loyalty during the shopping phase to prevent defection at a pain point
- Identify which channels need to be integrated seamlessly to meet expectations of an omni-channel experience
- Understand the different levers that can be used to help incentivise people to complete a purchase (financial and emotional) experience
- Understand the different levers that can be used to help incentivise people to complete a purchase (financial and emotional)







A Decision Making Journey for Cat Food: Conclusions

The challenge is real

This reluctance to engage with the category creates few opportunities for brands to become the brand of choice. It makes the moments they can influence choice in their favour ever more valuable. Brands have to optimise every single engagement opportunity open to them, to meet the cat owner where they are, on their terms being resonant, relevant and deeply empathetic.

And when a brand has become the 'chosen one', rather than take for granted the owner's in-built resistance to switching, it must keep providing value beyond the product itself, to both protect against defection during when reselection inflection moments and disruptions occur.

The decision making journey provides many engagement opportunities for brands to support and influence cat owners in their favour; directly, indirectly, implicitly and explicitly. And even more importantly, brands have the opportunity to shape the belief systems people have about cat nutrition that influences everything from how they enter, engage with and experience the category.

By focusing on understanding the psychology and behaviour behind each facet of the journey, a brand can understand exactly how to influence the right person at the right time, in the right place and at just the right moment.



The decision making journey for cat food is a complex one. Once a cat owner has been through it and its emotional roller coaster, they are not in a hurry to repeat it.





Key Things to Remember

The goal is simplicity

Multiple entry points:

How cat owners enter and engage in the decision making journey at any number of different stages depends on the different influences and triggers.

Nothing is linear and everything is connected:

Cat owners move back and forth through different stages, sometimes skipping stages depending on their needs and level of information they've already attained.

The cat owner is in control:

With the almost limitless amount of options available in both the physical and digital world, recognising the needs of the cat owner and designing marketing and engagement strategies to address and support those needs isn't optional, it's critical.

An explosion of channels:

The ever-expanding array of channels and sources available to inform, educate and influence cat owners provides brands with almost endless opportunities to connect and engage meaningfully at any stage of the decision making journey.



Prioritise experience over touchpoints:

Cat owners don't think in terms of touchpoints, they think about the whole experience and it's their perception of the whole experience that forms their perception of, and attitude toward the brand. Providing a connected, seamless, relevant and consistent experience across all opportunities to engage is critical.

The goal is simplicity:

Rather than add to the complexity and chaos, look for ways to help make the journey as easy as possible for the cat owner to reach a successful conclusion.

Plan for every stage:

No two cat owners will have the same journey. Even though not every cat owner will pass through every stage of the decision making journey, plan proactively on the basis that they will, even if that passing is only cursory. If you ignore key moments that matter, or people who could hold influence over your target consumer, you're creating an opportunity for the competition.

Ultimately, trust is the basis of all decisions. The more a brand can demonstrate trustworthiness by guiding cat owners through the category, and by informing and advising while providing a consistently relevant and resonant experience that adds value and support in moments of need, the more likely they are to not just make it into the bowl but, cat permitting, keep making it into the bowl.

Final Word

Thank you for making it this far! We'd love to know your thoughts about the Cat Food Decision Making Journey, and how you're trying to tackle some of the issues we've highlighted. We'd also love to share our work with you on how we've helped brands engage with people (and even their pets!) to gain competitive advantage and drive category leadership. And we're always here to discuss any upcoming challenges or opportunity spaces we might be able to help you overcome and win.

For more information please contact: elizabeth@thesoundhq.com

