

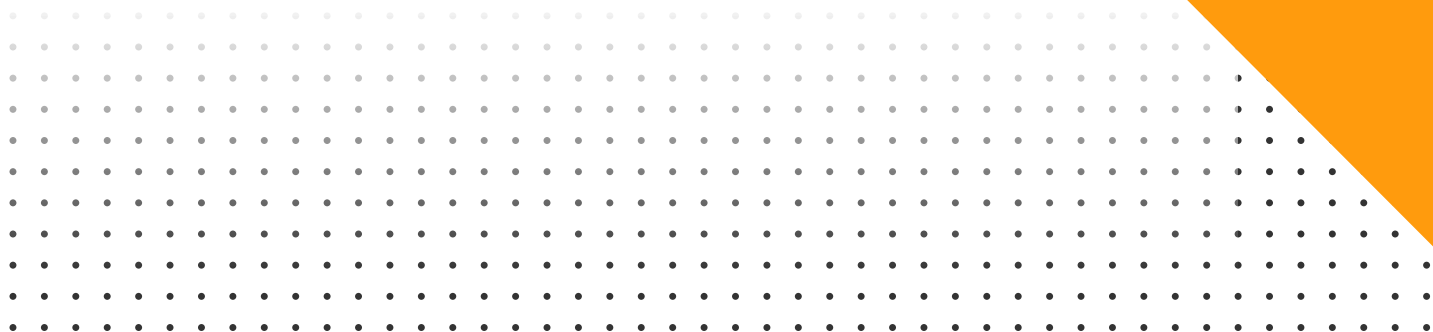


Decoding Consumer Decision-making

Where, when and why consumers decide what to buy

Selected insights from in-house consumer research study
and introduction to Walk Through

March 2026



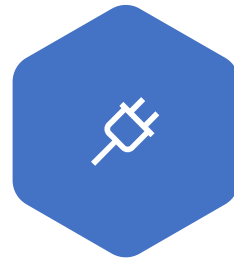


We were curious to decode how decision-making works when choosing a product



Who

We interviewed 600 consumers in Italy
Men and women aged 18 and up
Responsible for purchasing decisions



What

We asked questions for a long list of product categories
Where do they buy them
When they decide what to buy
How they decide



When

Fieldwork was
conducted in February
2026.



We covered 4 macro-categories and more than 30 specific product categories across 4 channels

CATEGORIES

CHANNELS



PERSONAL CARE

- Intimate detergent
- Deodorant
- Shampoo
- Shower gel/ body wash
- Toothpaste
- Hair care products

- Toilet paper
- Paper tissues
- Laundry detergent
- Floor detergent
- Dish detergent

HOUSE CARE

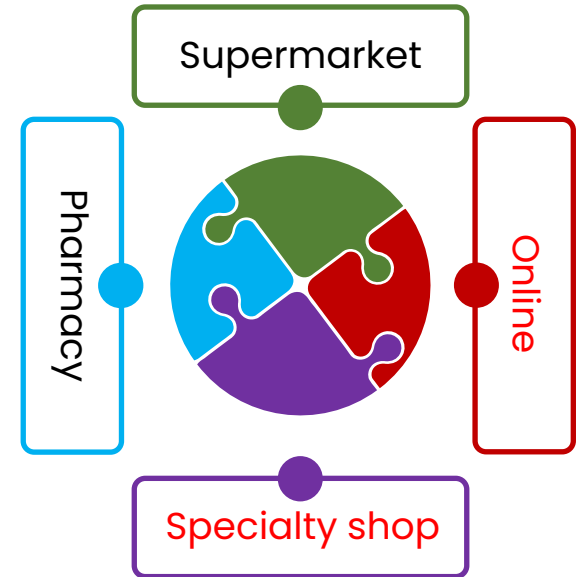


FOOD

- | | |
|---------------|----------------------|
| Coffee | Yoghurt |
| Milk | Savory snacks |
| Mineral water | Wine |
| Dry pasta | Beer |
| Olive oil | Non-alcoholic drinks |
| Cookies | Gluten free products |
| Cereals | |

- Dietary supplements
- Lactic ferments / probiotics
- Sleep and stress-reliever products
- Weight loss and weight control

OVER-THE-COUNTER DRUGS



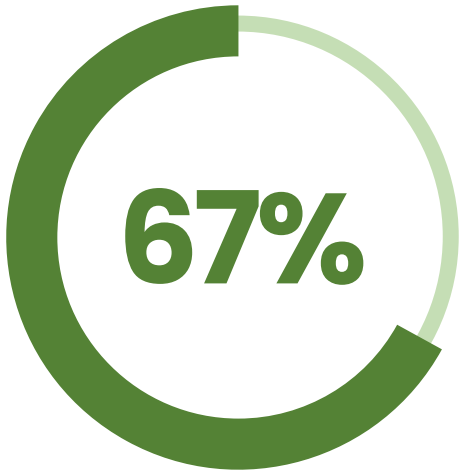


How many consumers purchase these categories at the supermarket?

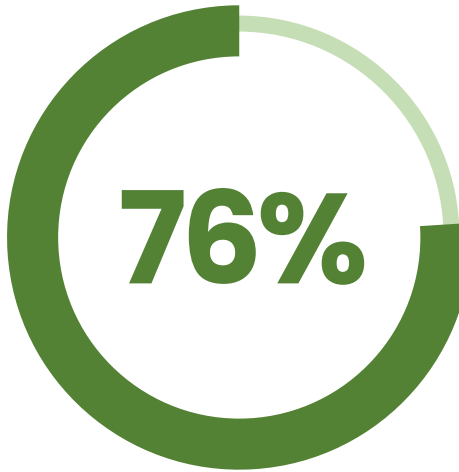
SUPERMARKET

Where do I buy

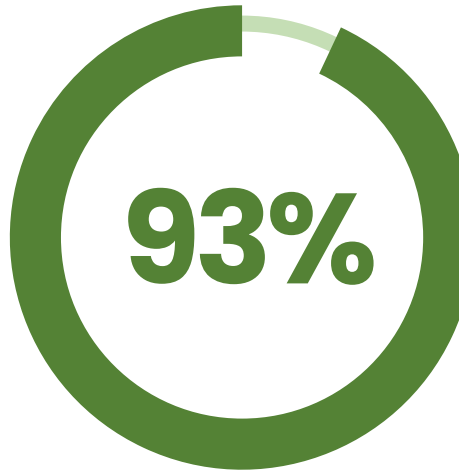
PERSONAL CARE



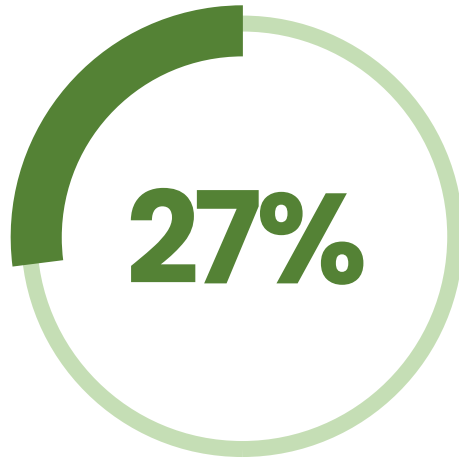
HOME CARE



FOOD



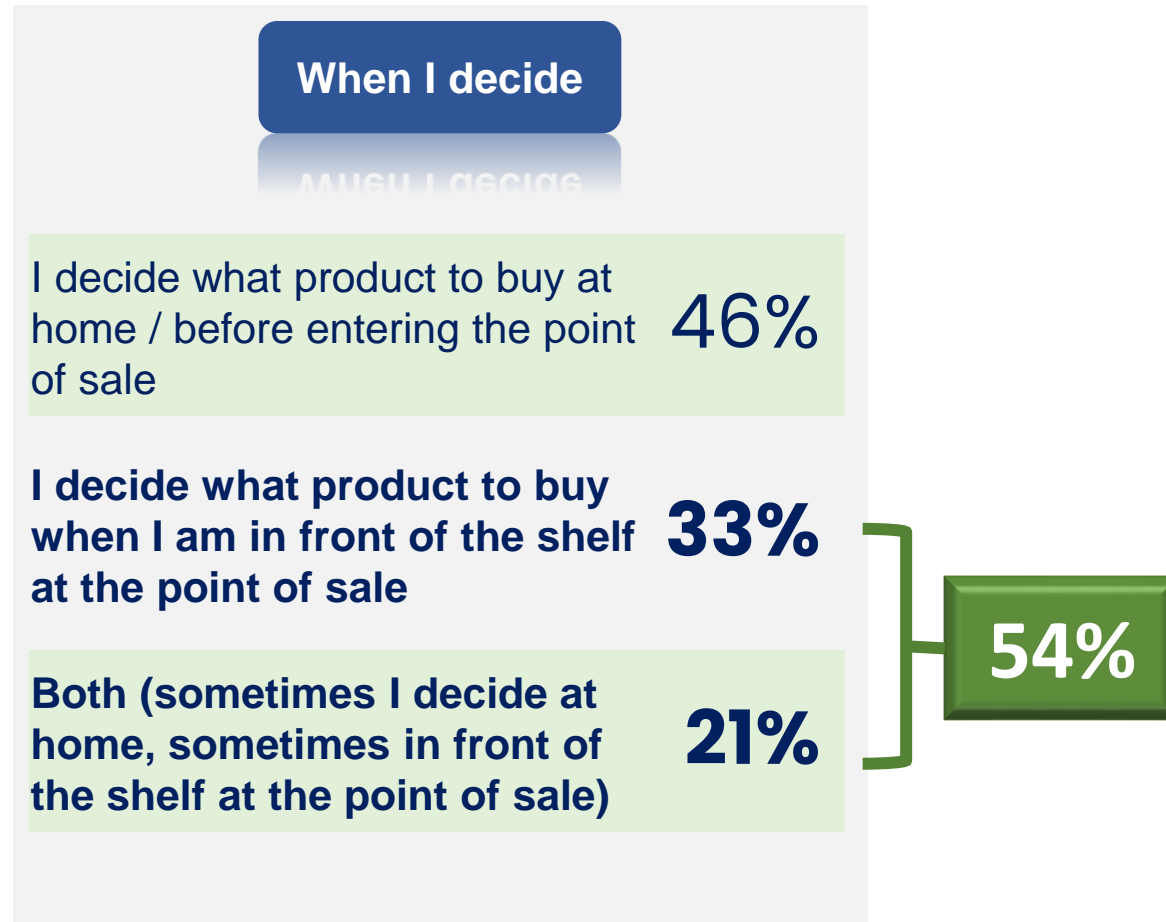
OTC DRUGS





54% of decisions are potentially made in front of the shelf

SUPERMARKET





The approach does not change much depending on the category, but rather across the various channels

SUPERMARKET

When I decide

PERSONAL CARE



HOME CARE



GROCERIES



OVER-THE-COUNTER DRUGS



Decides what product to buy in front of the shelf at the point of sale

54%

54%

54%

50%

Supermarket

Specialty shop

Pharmacy

Online

Decides what product to buy in front of the shelf at the point of sale

54%

59%

43%

53%



When decision is made at shelf, these are some of the elements that can impact the choice

SUPERMARKET

PRICE 36%



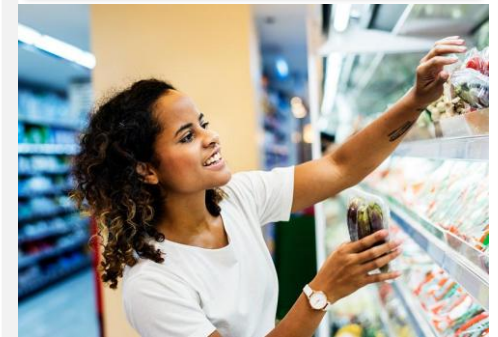
BRAND 22%



MOST CONVENIENT
FORMAT 22%



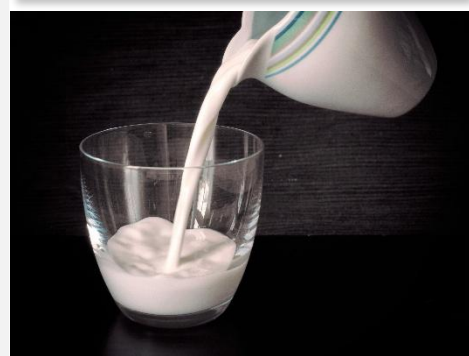
WHAT I ALWAYS BUY
18%



INGREDIENTS/
COMPOSITION 17%



EASY TO USE
PACKAGING 10%



THE COUNTRY OF ORIGIN
OF THE PRODUCT 10%



Q006 - Thinking about category _____ (insert category), when you decide on the specific product/brand to buy in front of the shelf at the supermarket, on what basis do you decide?

Sample: Who decides the product to buy in front of the shelf



What changes in Specialty Stores?

PERSONAL CARE

HOME CARE



Where do I buy

buy

When I decide

When I decide

Who decides the product to buy in front to the shelf

How I decide

How I decide

18%

I decide what product to buy at home / before entering the point of sale **41%**

I decide what product to buy when I am in front of the shelf at the point of sale **32%**

Both (sometimes I decide at home, sometimes in front of the shelf at the point of sale) **27%**

59%

In promotion or special offer **50%**

The effectiveness **21%**

The brand **21%**

The ingredients / composition **20%**

The most convenient format **20%**

The benefits **16%**

The perfume **16%**

The packaging that attracts me the most **15%**

The naturalness **13%**

SPECIALTY STORES

Q004 - Where do you buy products from the category...

Q011 - Thinking in general about your purchase from the category... at specialty stores (Tigotà, Acqua e Sapone, etc.), when do you decide what specific product/brand to buy?

Q012 - Thinking about the category..., when you decide what specific product/brand to purchase within the specialized store (Tigotà, Acqua e Sapone, etc.), on what basis do you decide?



WALK THROUGH



Want to learn more about how consumers make decisions at shelf?

We organize tests in a virtual store.

We create virtual stores for your online tests!

We can do it all over the world

We use the best technology for pack shelf test

The main KPIs: memorability, visual standout, purchase intention, package elements, price sensitivity ... !



What makes ALES
unique?

WALK
THROUGH

- **REALISTIC.** The Walk-Through store recreates the physical environment in a highly realistic way
- **IMMERSIVE.** Consumers find themselves immersed in a real store right from their own homes, simply by using a computer
- **ADAPTABLE.** It can be applied to different categories





Click the links and try to browse an example of virtual store!

<https://fwk2.it/h/storev4/UNPWBK/1>



<https://fwk2.it/h/smr146/PO9300/1>



A shopping cart is positioned on a desk in the foreground, with a laptop and various documents scattered around it. In the background, a person is partially visible, holding a yellow object. The scene is lit with warm, golden light, suggesting a sunset or sunrise.

FOR MORE INFORMATION



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