CASE STUDY / SHOPPER RESEARCH

Rebuilding a shopper segmentation for repeated use

Recovering an undocumented study and turning it into a framework the agency could keep selling.

FOR	Research agencies and insights teams
CLIENT	A U.S. shopper-research agency
ROLE	Outside analyst and research lead, 2022 to 2023

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EXECUTIVE SUMMARY

A stalled project became a research product the agency could keep selling

01
Inherited a stalled project

The director running it left mid-project with no documentation. I reverse-engineered the design from data built by someone else.

02
Built for reuse from day one

Six shopper segments and four trip groups, with typing tools developed alongside the segmentation rather than after it.

03
First application sized 7M shoppers

Weeks after delivery, one underdeveloped segment became a quantified growth gap for a packaged-food client.

04
Scaled into a product line

A 20-chain retailer extension, custom builds across 8+ categories, and a syndicated offering.

6 shopper segments · 4 trip groups · 7M-shopper opportunity · 20 retail chains sized

BACKGROUND

A stalled project with no documentation, not a blank slate

~33,200

RESPONDENTS

U.S. general population, fieldwork already complete

20

RETAIL / CPG CATEGORIES

Top-level categories in the base survey

4 weeks

SCOPE TO DELIVER

A typology and a reusable method

The director running the segmentation left the company abruptly, with no documentation and no one internally able to pick the project back up. The data collection design was already locked. My task was to reverse-engineer that design, then deliver an actionable typology and a method the team could run again.

> Someone else's data, someone else's design, four weeks.

The shopper and the trip answer different questions

	Trip 1	Trip 2	Trip 3	Trip 4
Shopper 1	S1 / T1	S1 / T2	S1 / T3	S1 / T4
Shopper 2	S2 / T1	S2 / T2	S2 / T3	S2 / T4
Shopper 3	S3 / T1	S3 / T2	S3 / T3	S3 / T4
Shopper 4	S4 / T1	S4 / T2	S4 / T3	S4 / T4
Shopper 5	S5 / T1	S5 / T2	S5 / T3	S5 / T4
Shopper 6	S6 / T1	S6 / T2	S6 / T3	S6 / T4

Cross-tabbing the two gives a single shopper-by-trip grid, so any respondent can be read on both dimensions at once. Schematic structure, not segment sizes.

SHOPPER MODEL

Who is this person as a shopper?

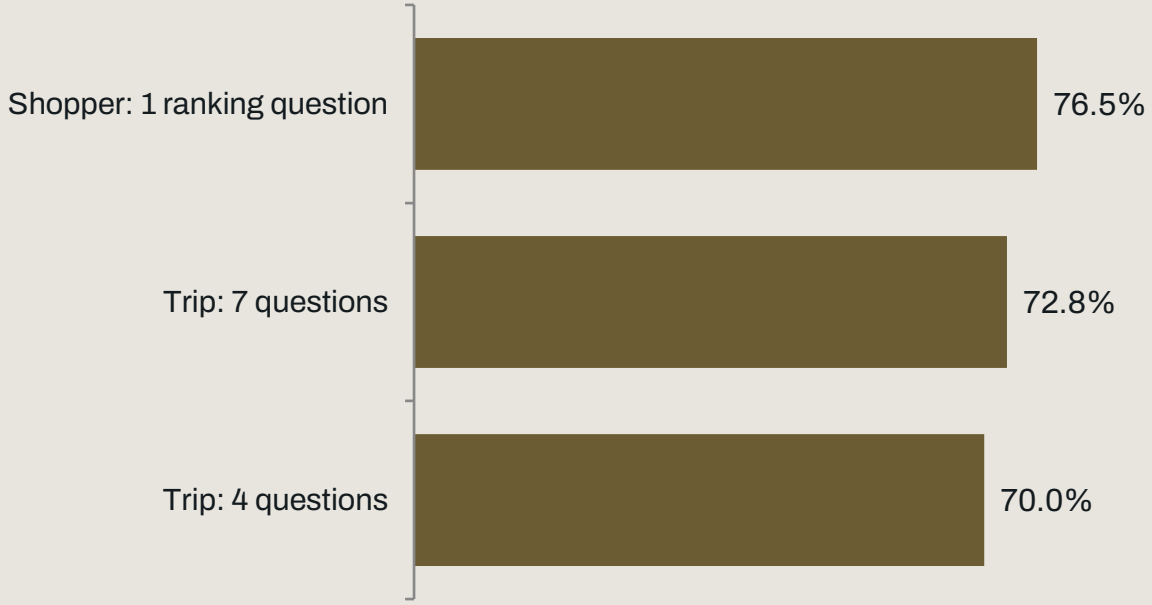
k-means, k=2 to 9 evaluated on variance explained and Calinski-Harabasz. Six segments selected.

TRIP MODEL

What kind of occasion is this?

Latent class analysis run separately for in-store and online trips, rolled up with Ward's clustering into four broader groups.

Short typing tools made future application feasible



Agreement with the full statistical model.

Accuracy and survey length

The shopper tool assigns a segment from a single ranking question. The trip tool was delivered as an explicit trade-off: seven questions, or a leaner four-question version for space-constrained surveys that gives up under three points of agreement.

Both were packaged as programmer-ready, cell-by-cell logic so the internal team could implement them on any future study without me.

ACTION / METHODOLOGICAL JUDGMENT

Build the typing tool with the segmentation, not after it

BUILT AFTER THE FACT

Accurate, and hard to trust

A classifier fitted to already-locked segments picks whatever combination of variables best predicts cluster membership, even when that combination is only loosely related to what the segment means. It can score well and still sort people in ways a client-facing team cannot explain.

BUILT ALONGSIDE

Face-valid by construction

I developed the typing tool alongside the segmentation, evaluating decision trees against regression and choosing the simpler tree where it held up. Segments stay parsimonious and explainable because the typing logic and the segment meaning were shaped together.

Brand Name Buyers, for example, are defined by respondents' own stated preference for brand names rather than by a black-box mix of proxy variables that happened to correlate with the cluster. The payoff: segments a team can explain in one sentence and trust when an individual respondent lands in one.

ACTION / COMMERCIAL APPLICATION

Weeks after delivery, one segment gap became a 7M-shopper growth question

7M

potential incremental shoppers

if the client matched the competitor's penetration within one underdeveloped segment

The first real application was a packaged-food brand deciding where to focus growth investment. The analysis showed the client under-indexed sharply on one values-driven shopper segment where a competitor was already strongly developed, and sized the gap.

ACTIVATION BRIEF, NOT JUST A NUMBER

Who these shoppers are (demographics, values, media habits), how they are influenced, and specific implications for messaging, retail placement, packaging and shelf strategy.

A conditional opportunity estimate. It does not represent acquired shoppers or realized growth.

ACTION / EXTENSION

The same model became a retailer tool and a category product

01

Base framework

~33,200 respondents, 20 broad categories. The shopper-by-trip typology and typing tools.

02

Retailer mapping

~6,000 respondents, 20 major U.S. chains, 37 categories. Segment sizes chain by chain, so retailers themselves could use the typology.

03

Category studies

Custom builds across 8+ categories for one household and personal-care manufacturer, standardized so results were comparable across its portfolio.

By this point the one-off analytical build had become a repeatable, multi-client product line, with the same underlying model behind every extension.

ACTION / PRODUCT ROADMAP

A plan for an ongoing business, not a one-off deliverable

01

Phase 1: Base segmentation

Delivered. The shopper-by-trip typology and typing tools, built and validated.

02

Phase 2: Retailer mapping and portal

Retailer-level sizing plus a self-serve online reporting portal.

03

Phase 3: Tracking and syndication

Ongoing measurement and a syndicated offering brought to market.

15+

COLLEAGUES TRAINED

Account and research teams self-serving from the shared analytics dashboard I built and administered

WHY IT MATTERED

Documentation, dashboard access and training are what let a segmentation outlive the analyst who built it.

RESULT

The framework became the centre of the agency's shopper-research offer

"We have been actively selling the syndicated wave, plus the custom deep dive... and the response has been really strong."

Agency leadership, within weeks of the first category application launching commercially

The first category presentation, the worked example on slide 7, "went really well" in the same leadership contact's assessment.

Outcome	Evidence
Sold as a product	Syndicated wave plus custom deep dives, across categories and clients
Positioned the agency	The framework became the centrepiece of its shopper-research go-to-market
Built capability	15+ colleagues trained; dashboard and programmer-ready logic in place
Shaped hiring	Its ongoing application was a direct factor in a senior analytics leadership hire

RESULT / EXPERTISE

A segmentation earns its value through repeated use.

I build analytics that a team can keep selling after I leave: documented, explainable and packaged for people who did not build them.

Segmentation design	Multi-method clustering with formal solution selection and a two-layer structure.
Methodological judgment	Interpretability over complexity; typing tools built alongside the model.
Productization	Programmer-ready tools, a phased roadmap, and the training to run them.

Discuss your project kenjfield@gmail.com

ABOUT THIS CASE STUDY

Client, categories and end-client identities are withheld to protect confidentiality. The 7M figure is a conditional opportunity estimate, not realized acquisition. Quotations are from agency leadership and are reproduced with names removed.