BRAND COMMERCE™ INTEL FOR TODAY'S CMO

THE BRAND COMMERCE ADVANTAGE™

OUT OF SIGHT, OUT OF CART: HOW TO WIN THE SHELF WAR IN 2026

VOLUME

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01 MARKETING AS SAFETY NET

How Brands Win the Digital and Physical Shelf War When Availability Fails

In 2026, brands are fighting a quieter but more consequential battle. Not just against inflation, retailer constraints or cost pressure, but against a shopping environment where decisions are increasingly automated, delegated and made in seconds.

That means consumers compare faster. Platforms substitute faster. And when a brand doesn't surface, whether due to availability, ranking or relevance, the decision is often made without the consumer ever seeing the alternatives.

You can't control every shelf or every algorithm. But you can control how your brand shows up in the moments when humans, or platforms acting for them, decide what goes in the cart.

When availability wavers, marketing becomes the force that keeps a brand chosen, trusted and mentally available. This is one of the principles of the Brand Commerce™ approach.

This white paper is built around three deceptively simple questions:

- When consumers can't find their preferred brand, what makes them pick yours instead?
- When you are the brand that's hard to find, what makes them stick with you anyway?
- If they do switch away, what makes them switch back?

Across all three, our data and the broader evidence point to the same answer:

Strong, strategic, well-positioned marketing is the safety net.

It doesn't replace operational excellence—but it determines who wins when availability fails.

This paper combines:

- A proprietary survey of 200 U.S. adult grocery consumers.
- External evidence on brand-building and consumer decision-making.

We'll use the survey selectively to illuminate the few moments that really matter for brands:

- When consumers discover their favorite isn't available and choose a default.
- The grace period when consumers decide whether to give up.
- When they come back after trying an alternative.

And in every one of those moments, marketing is the deciding factor in whether your brand wins or loses.

The Takeaway

Across three critical moments—when a competitor's products are missing, when your products are missing and when consumers consider coming back—strong, strategic marketing is the safety net that enables your brand to win.

02

WHEN THE COMPETITOR IS MISSING:

How Marketing Makes Your Brand the Default Choice

Increasingly, the default choice when a favorite brand isn't available isn't always made by the consumer. On digital shelves like Instacart that offer pickup, delivery, subscriptions and auto-replenishment services, it's the platform that (often) selects the substitute automatically.

In those moments, the "winner" isn't just the brand that's in stock. It's the brand whose marketing signals make it the safest, most relevant alternative in the system's eyes.

Imagine the Scene

A consumer explores the digital or physical aisle intending to buy a specific competitor's product. It's their go-to brand.

But today, it's not there.

They still need that cereal, yogurt, coffee, pasta, detergent, etc. The question is no longer "Will they buy?" It's "Whose brand will they buy instead?"

Our survey made it clear what happens when consumers can't find their brand:

58% of consumers said that when they can't easily find the brand they usually buy, they buy a different brand instead

14% said they "wait and buy it later"

In other words, almost **6 in 10 consumers** immediately reallocate their spend to another brand when their usual brand is hard to find.

And so the question is:

In those moments, will they choose your brand?

The "Marketing Presence" That Wins You the Switch

When consumers are forced to make a fast trade-off, they rely on quick, confidence-boosting cues—nearly all of which sit squarely in marketing's domain.

The top drivers of that decision are what we refer to collectively as the **marketing presence index**:

- Familiar brand memory (built by consistent advertising and branding)
- Price and value framing (offers)
- Functional reassurance (ratings)
- Visual proof of quality (packaging)
- Social proof (labels like "Best Seller")

When their brand disappears, consumers end up choosing the most mentally and visually available alternative—the brand whose marketing has made it feel familiar, findable and worth choosing.

When your competitor is missing, all of that work pays off in one quiet, decisive moment when the consumer thinks, "I'll just grab this one. I know this brand."

That is marketing winning the shelf war.

The Takeaway

When consumers' favorite brands go missing, most will switch on the spot—so the brand they choose next is the one whose marketing has already made it familiar, visible and compelling to buy.

WHEN YOU ARE THE ONE THEY CAN'T FIND:
How Marketing Buys You Time

03

NOW FLIP THE SCRIPT.

This time, you're the brand that doesn't surface—not just because of an out-of-stock but because the digital shelf didn't prioritize you. A platform substituted another SKU. A pickup order defaulted to a different brand. A consumer never even noticed you disappear.

When that happens, the risk isn't just a missed sale. It's consumers silently switching to your competitor.

Consumers Will Give You Some Leeway—If You've Earned It

Our survey shows consumers don't instantly abandon brands they like. When asked, *"If your usual brand is hard to find or out of stock, how many times in a row would that have to happen before you stop considering it?"* they said:

48% Two times

30% Three or more times

19% I usually keep looking for it

There's a grace period. Most people will tolerate at least two strikes before they move you out of their mental rotation—and some will keep hunting beyond that.

But there's also a clear warning sign:
71% agree that if a product is often unavailable, they lose interest

Marketing's job is to stretch that forgiveness window—to keep the brand emotionally present and worth waiting for, even when it's physically missing. The pattern looks like this: Short-term absence is forgivable. Chronic absence is fatal.

Marketing Builds "Belief Margin" Around Your Brand

Why would a consumer wait or keep looking for your product when another is right there?

Because your marketing has built what we call a belief margin:

- They believe your quality is better or more consistent.
- They identify with your promise, lifestyle fit or values.
- They remember positive experiences and don't want to downgrade.

When you hit supply turbulence, smart marketing doesn't just scream, "We're back!"

It quietly and repeatedly reminds people why you were worth loving in the first place and worth waiting for in those (ideally rare) moments when you're hard to find.

The Takeaway

When you're the brand that's missing, you're not doomed yet. Most consumers will give you two to three chances, and strong, consistent marketing is what turns that brief grace window into a "belief margin" that keeps you worth waiting for and searching out instead of being quietly replaced.

04 WHEN THE PLATFORM MAKES THE CHOICE

On third-party shopping and delivery platforms (Instacart, Shipt, DoorDash, Uber Eats, GoPuff, and others), consumers often don't choose the replacement brand. The platform does.

When an item is unavailable, algorithms select substitutes based on signals like:

- Ratings and review strength
- Price and value consistency
- Retail media presence
- Product detail quality and relevance

If your brand isn't competitive across those signals, it doesn't just lose the sale. It loses the chance to be reconsidered.

That's why marketing matters even more on digital shelves. It doesn't just influence preference.

It influences which brands get surfaced, substituted, and normalized as "good enough" defaults.

The Takeaway

On third-party shopping and delivery platforms, the algorithm becomes the consumer when items are out of stock. Your digital marketing signals (ratings, reviews, retail media, price consistency, PDP quality) determine whether your brand is chosen as the default replacement or quietly disappears from the cart.

05 AFTER THEY'VE SWITCHED:
How Marketing Wins Them Back

Sometimes, the worst happens.

Your brand is out of stock or hard to find one time too many, and a consumer finally crosses the line:

"I'll just get something else."

When our survey respondents thought about the last time their usual brand was out of stock, they told us they:

44%	Bought a different brand
23%	Bought another size or flavor in the same brand
22%	Went to another store or website
10%	Waited and bought it later
2%	Skipped the purchase altogether

THE HEADLINE:

Almost half of consumers switch brands when their go-to is missing.

Once people build a new habit, coming back is not automatic.

The Good News: Loyalty Is Recoverable—But It's a Marketing Job

When asked "What would make you return to your preferred brand after switching?" consumers said:

- **56%** – It's reliably back in stock
- **55%** – Better price or a coupon
- **27%** – A strong in-store display/promotion
- **25%** – More or better reviews
- **23%** – A pack/size that fits my needs better
- **19%** – Better product info and photos
- **18%** – Lots of good advertising
- **16%** – More consistent pricing

Two drivers—stock and base price—sit squarely in the world of operations and retail partners. But six of the top eight reasons for returning are directly controlled (or heavily influenced) by the **marketing presence index.** Once consumers have switched away, marketing is the primary way back in.

"Winning Them Back" Marketing

The switcher isn't asking, "Should I try this brand again?" They're asking, "Is going back worth the hassle and risk?" Our survey reveals the outline of a return-to-brand roadmap. It starts with using strategic marketing to rebuild trust—to make your brand visible, credible and easy to choose again. Once that belief is reestablished, many consumers will come back. Why? Most people are simply looking for a familiar offramp from the time and effort it takes to keep experimenting with new brands.

The Takeaway

Once consumers switch, they don't automatically come back. Our data shows most will return when it feels easy, safe and smart to do so, which means marketing (not operations alone) has to do the heavy lifting to make your brand the obvious "worth going back to" choice.

06 WHEN YOU CAN'T CONTROL THE SHELF:
Marketing as the Safety Net

There's a hard truth in today's market.
Much of what disrupts your shelf presence today isn't a breakdown—it's a system working as designed. Digital shelves rank, filter and substitute constantly. When a brand isn't available, visible or prioritized, the platform moves on instantly.

That means availability isn't just an operations issue anymore. It's a marketing-influenced outcome.

More than half of U.S. consumers say availability worries them before they even step inside the store.[1]
You can't control every shelf, so yes, there will be supply gaps. But they don't have to cost you the consumer.

You can control what the consumer believes about your brand in the meantime.
That's where marketing becomes a stabilizing force. Not a gloss-over, not noise—but stability. The brands that keep showing up, even when the shelf doesn't cooperate, are the ones that still feel reliable, familiar and worth sticking with.

Here's how marketing acts as your safety net.

It reinforces perceived stability.
Consistent presence in media tells consumers, "We're strong. We're steady. We're still here."

It keeps momentum alive during disruptions.
Activity across channels ensures a temporary outage doesn't look like long-term decline.

It protects trust through clarity and transparency.
Straightforward communication reframes issues as turbulence, not brand failure.

It keeps you top-of-mind so switching doesn't stick.
Visibility across touchpoints keeps your brand in rotation, even if a consumer can't find you today.

Strong brands don't avoid volatility—they absorb it by staying present, consistent and confident when everything else feels unsteady.

The Takeaway

When external forces are volatile, you can't control the chaos—but you can control the story. Brands that keep showing up with consistent, confident marketing are the ones consumers experience as stable, trustworthy and worth sticking with when everything else feels shaky.

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07 THE WAY FORWARD:

What To Do in the Three Moments That Matter

Winning the shelf war is about showing up when it counts—not just when everything is going smoothly. Here's the practical, marketer-controlled playbook for each critical moment.

1

When the Competitor Is Missing: Win the Substitution Moment
Consumers decide in seconds. Your job is to make choosing you feel easy, smart and familiar.

Make your brand the obvious backup.

- Strengthen distinctive visual cues so consumers notice you in 3 seconds.
- Invest in retail media to secure eye-level, endcap and top-of-page presence.
- Ensure PDPs are current and confidence-building (reviews, images, claims).
- Use packaging & in-store messaging that signals quality and reliability immediately.
- Leverage social proof ("Popular Pick," "Best Seller") wherever retailers allow.

The goal:
If their first choice fails, you become the safe, familiar option.

2

When You're Missing: Extend Forgiveness Window
Consumers give brands two to three chances before they move on. Marketing's job is to stretch that grace period.

Keep the brand emotionally present even when it's physically absent.

- Maintain consistent advertising—don't go dark during outages.
- Use creative to reinforce what you stand for.
- Redirect demand: highlight alt sizes, formats or retailers where stock is available.
- Use email, social and retailer updates to acknowledge disruption w/o dwelling on it.
- Communicate stability via tone & cadence; reliability is a feeling, not just a fact.

The goal:
Stay "worth looking for" even when you're temporarily hard to find.

3

After They've Switched: Build the Return Path
Once consumers substitute, coming back isn't automatic. You must give them a clear, low-effort reason to return.

Make returning feel easier and safer than sticking with the new brand.

- Promote reentry offers (price, value framing, trial incentives).
- Highlight improvements — "Now easier to find," "Back in stock," "New pack size," etc.
- Boost review volume and freshness to rebuild confidence.
- Use targeted media to reintroduce the brand with a clear "why now" message.
- Feature usage, benefits & social proof to remind consumers what they loved in first place.

The goal:
Make the consumer think that going back is the better choice.

The Takeaway

Win the shelf war by using marketing when rivals are missing, staying sought after when you're off shelf and making returning to your brand the easiest choice.

08 A SIMPLE CHECKLIST TO KEEP YOU ALIGNED

Use this checklist to ensure your marketing is doing its job at every moment.

WHEN A COMPETITOR IS MISSING

- ☐ Are we easy to spot? Can you trust us quickly?
- ☐ Does our shelf, packaging and PDP presence make substitution feel low-risk?

WHEN WE'RE MISSING

- ☐ Have we built enough equity to earn two to three forgiveness cycles?
- ☐ Are we actively reinforcing stability and redirecting demand?

WHEN A CONSUMER HAS SWITCHED

- ☐ Are we highly visible and easy to rediscover?
- ☐ Do our promotions, messaging and reviews give a clear reason to return?

Ready to win at shelf?

Contact us to get your 2026 Shelf War Vulnerability Score—a 10-minute diagnostic assessment that reveals your biggest revenue risks and where competitors are gaining ground.

About Blue Chip

We're an independent, full-service Brand Commerce™ agency. We bring change for our clients by uniting brand building and sales performance. We build brands over time and sales overnight.

About the Report

In November of 2025, Blue Chip conducted an exclusive online survey of 200 U.S. consumers regarding their purchase behaviors of brands in-store and online.

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