Shopper Engagement Study

Czech Republic 2015

PROJECT PARTNERS

Understanding the shopper's decision process – the complex interplay of factors that determine how, where and when shoppers make their purchase decisions – is emerging as a priority for product manufacturers, retailers and brand marketers. **Since 1965, POPAI - The Global Association for Marketing at Retail** has researched shopper trend and the influence of in-store media.This project is supposed to deliver new knowledge to marketing and retail professionals about the reality of shopping and changes in shopper behavior.

PROJECT DESIGN

Using a similar research approach as the previous US studies conducted by POPAI (2012 Shopper Engagement Study, 2014 Mass Merchant Study), the Shopper Engagement Study CZ 2015 used a core methodology of **pre- and post- shop interviews** as well as a **display audit** and **basket analysis**. Regarding the conducted studies in the United States and Hungary, this study can also offer a cross-market comparison.

Research tool

SHOPPER F2F INTERVIEWS BEFORE AND AFTER SHOPPING (10 + 25 minutes) conducted to analyze the shopping behaviors, habits and trends
REGISTER RECEIPTS collected to measure the in-store decision rate (plan vs. real purchase), influence of POP media on sales and cross-sell opportunities
STORE AUDIT of the POP media executed to analyze their role and efficacy

Fieldwork & Sample

DATA COLLECTION: 29.6. - 31.7. 2015
LOCATION: 6 major retailers (2 shops for each retailer)
- Supermarket: Albert SM, Billa, Tesco SM
- Hypermarket: Albert HM, Globus, Tesco HM

Shoppers interviewed
N=3.255

Items on register receipts
N=34.112

POP media recorded
N=1.309

MAIN RESEARCH OBJECTIVES

SHOPPERS & HABITS - detailed description of the shoppers' characteristics and shopping habits *(leaflets use and impact, pre-store planning, shopping lists, socio-demographics, shopping mission & shoppers segmentation, shopping party size, length of shopping trip)*

BASKET & POP MEDIA ANALYSIS - deliverables based on register receipts and Store Audit of POP media *(In-store decision rate = measurement of the store impact on purchase decision making, total and (sub)category spending, number of purchased products, cross-sell opportunities, POP media statistics, Display Lift Index = measurement of the POP media effectiveness)*

EVALUATION OF PURCHASED PRODUCTS & CATEGORY SECTION - outputs based on direct evaluation of purchased products and home section of the category by shoppers *(triggers of unplanned purchase, factors of product selection, level and reasons for switching and walkaways final consumer identification, secondary display use, ease of shopping & inspiring exploration scores of categories)*

OUTPUTS

Results are delivered on aggregated level and product category level

The aggregated report provides access to findings across the entire sample and Hypermarket and Supermarket retailers. It serves as perfect guide to gaining insights in how all shoppers are behaving during their shopping trips and what are differences and specifics of both retail channels .

The category report report takes a deep dive into individual categories to see how the category shoppers shop the stores specifically. It serves as perfect guide to gaining insights in how category shoppers are preparing and making their shopping trips.

List of analyzed categories with individual reports : Butters & spreads, Coffee & tea, Packed soft drinks, Beer, Spirits, Chocolate tablets, Dressings, Instant soups & savoury, Ice cream, Shower gels & hair care, Deodorants, Toothpastes, Household cleaners , Laundry detergents, Yogurts, yogurt drinks, Biscuits, Salty snacks, Spices & seasonings, Pet food

COSTS OF REPORTS	Price [CZK without VAT]
Aggregated report	100 000 CZK
Category report of one product category	150 000 CZK
Action package of Aggregated report + 1 Category report	200 000 CZK

The study is able to generate useful insights even about categories which have not been questioned, since we are able identify category shoppers based on their register receipts (general shopping habits, leaflet use, cross-sell opportunities etc.).

SOME INTERESTING AGGREGATED RESULTS

DEMOGRAPHIC DATA ON CZECH SHOPPERS

Who are today's shoppers? How do they differ between supermarkets and hypermarkets?

MALES 29%

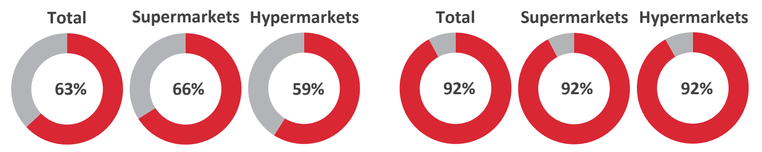
FEMALES 71%

Age	Total	Supermarket	Hypermarket
18 – 34	32%	36%	29%
35 – 54	39%	37%	40%
55 and more	29%	28%	31%
Age	**Total**	**Supermarket**	**Hypermarket**
Single	23%	25%	20%
Married	52%	45%	58%
Divorced / living separately	11%	14%	9%
Widower / widow	4%	5%	4%
Living with a partner	10%	10%	9%

LOYALTY CARDS

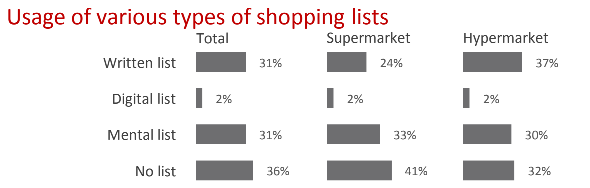
Penetration of loyalty cards

Frequency of use of loyalty cards
(always + most of the time)

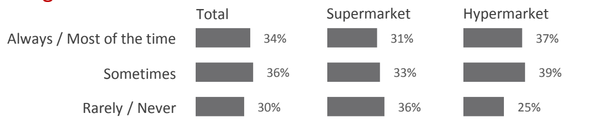


SHOPPING HABITS

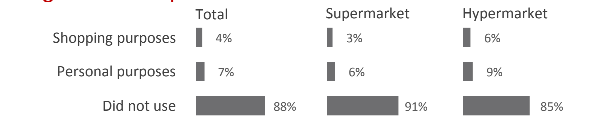
Usage of various types of shopping lists



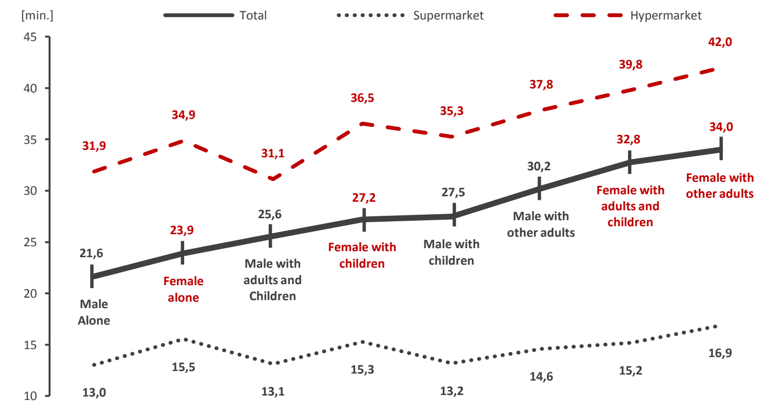
Usage of leaflets



Usage of mobile phones



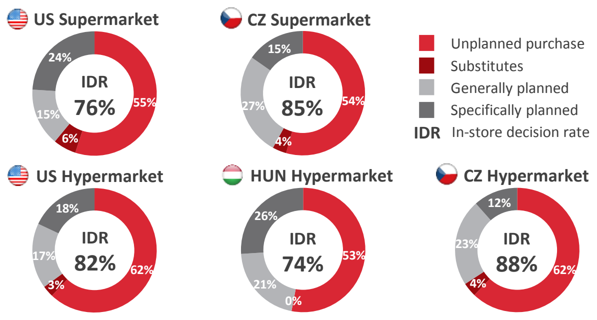
TRIP LENGTH



IN-STORE DECISION RATE

IDR = Amount of purchases which were not specifically identified to the level of product category and brand in a pre-shopping interview.

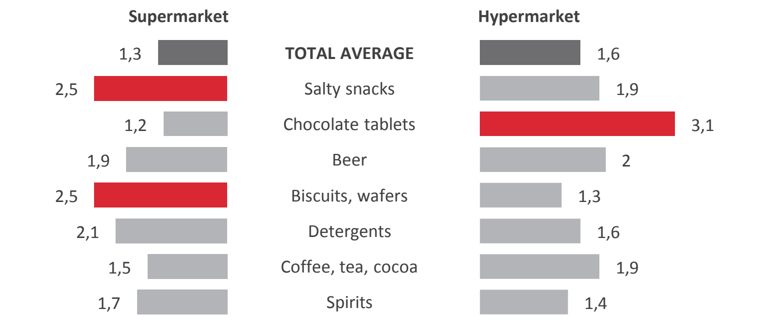
Czech, Hungarian and US supermarkets and hypermarkets



DISPLAY LIFT INDEX (DLI) - influence of POP media on sales

DLI = If shopper buys 1 product in the store without POP media and 2 products in stores with POP media. There is an increase of 100% thanks to POP media.

TOP 7 product categories with the highest DLI index



SECONDARY DISPLAYS USAGE

Share of purchases from SECONDARY DISPLAY. Meaning additional display which is NOT the main shelf (e.g. pallet, floor stand), regardless of whether it is located in the main section of the store or elsewhere.

Supermarket **19%**

Hypermarket **35%**

Male **30%**

Female **26%**

From where customers buy products?

	Total	Supermarket	Hypermarket
Home shelves	73%	81%	65%
Floor stand in home section	6%	3%	9%
Floor stand in other section	3%	3%	3%
Front shelf (gondola end)	7%	4%	9%
Pallet island / Large basket	5%	3%	8%
Cash desk shelves	1%	1%	1%
Cash zone	2%	3%	1%
Action promo-shelf	4%	3%	5%

More information and project brochure for download can be found here:
http://www.popai.cz/1-370/Shopper-Engagement-Study-CZ.aspx

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