



'Convenience is King'

*- Understanding the convenience
shopper and their interaction
with Out of Home*



Who we spoke to?

- 200 convenience shoppers – 50 x actual shopping visits & 150 virtual shopping visits
- 53% Female, 47% Male
- 50% aged 18-34
- 55% single
- 51% working either full or part time
- Mean Household income of €41,701



Convenience Shopping Habits

- 68% of convenience shoppers shop at a C-Store to do a Top-Up shop, 64% to buy Meal Solutions and 42% for Special Treats
- 69% travel by car to the C-Store, 31% walk
- 63% live nearby to the C-Store they visit
- Location is the most important factor in the choice of C-Store at 69%, followed by price at 31%

10% of eye-tracked shoppers were influenced to stop and shop by an ad format

- Milk, bread and confectionery are the top three products purchased most often in C-Stores
- Afternoon/evening is the busiest time for C-Store shopping, with 53% of respondents visiting during this time

The average spend per C-Store visit is €8.30

- The average number of visits to a C-Store per month is 19
- The highest C-Store spend happens during the evening and night; 28% spend more than €20

61% of eye-tracked respondents purchased an item on impulse with 38% of these purchasing sweets or chocolate

- Top-Up shoppers are more likely to be male and aged 18-34
- Impulse shoppers are more likely to be female and aged 18-34

The average impulse spend is €3.18



Media Consumption



- Eye-tracked shoppers spent an average of 1.16% of their shopping trip looking at various OOH advertising but...

86% of C-Store shoppers recalled 1 or more OOH format during their shopping trip

- Digital OOH performs strongly in terms of recall and impact on impulse purchases

Claimed effectiveness of OOH formats is strongest amongst Impulse shoppers

- Digital OOH formats show higher levels of recall among a younger audience of 18-34, while older audiences (35-55+) show higher levels of recall for many OOH formats
- High levels of OOH format recall translates in to strong brand recall



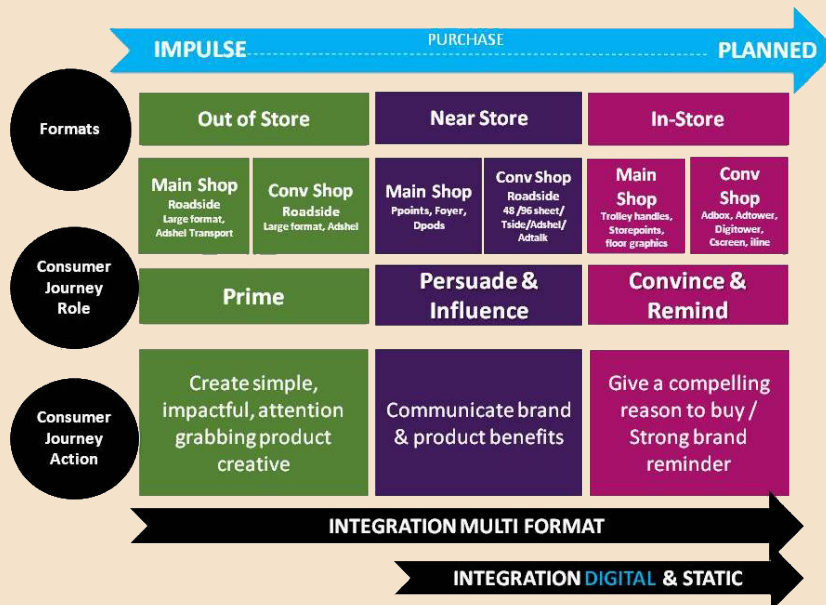
Multi-format campaigns which include the use of digital OOH perform strongest

In October 2014, Kinetic and GroupM launched a successful research initiative studying grocery shoppers' habits and their interaction with OOH. However, the convenience shopper differs greatly so further research was required to better understand this shopping cohort and what Out of Home formats they notice and interact with.

A mixed methodology approach was undertaken combining eye-tracking technology with interviews. 50 convenience shoppers were intercepted before they entered specific C-Stores and asked to wear eye-tracking glasses (Tobii Glasses 2) while they went about their normal shopping task. The eye-tracking technology measured the point of gaze, length of gaze and eye pupil fixation at various points during a convenience store shop.

Furthermore, additional C-Store shoppers were intercepted on-street by research agency, iReach, to take a virtual visit to a C-Store by watching video footage of a typical shop taken from the shopper's perspective. 50 respondents watched the video on a laptop calibrated with Tobii X2-30 and Studio Professional Software. The eye-tracking component measured a second by second eyeball movement and iris focus during the lifetime of the video. A further 100 respondents also watched the video on a standard PC and were asked a number of exit interview questions relating to the footage. Research took place in early March in Dublin at C-Stores located in the city centre, Clontarf and Leopardstown.

While the motivations for a convenience shop compared to a main shop may be different, the role of Out of Home formats on the path to purchase is similar. Shoppers who buy on impulse find a wider range of formats effective, versus those who have a defined list, respond to formats later in the path to purchase. Having integrated, multi-format, as well as a combination of digital and static formats on the path to purchase increases recall.



For more information on the findings and what this means for Out of Home, please contact:

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