



Poland

Shoppers under scrutiny: new observation methods in the Polish research market and an example of their implementation

New observation methods: increasing popularity

Only a few years ago new observation methods, such as NPVO (Non-Participating Video Observation) or Eye-tracking, were regarded by most marketers as nothing more than an interesting curiosity. The clients of the research companies seemed to be unable to fully comprehend the possibilities presented by these modern research techniques and were reluctant to commission studies based on such techniques, probably as a result of their devotion to other more "traditional" methods. Observation of shoppers in their natural "habitat" – in stores – was generally done by means of AST (Assisted Shopping Trips) or observation performed by interviewers directly in store. Currently, new methods of observation are increasingly gaining recognition amongst Polish marketers, who have begun to appreciate the enormous possibilities they offer and the numerous advantages over traditional methods, the most important being:

- the results are not based on declarations but on observation of actual behaviour
- there is an absolute lack of interference with the shopper's behaviour
- 100% natural character of the situation
- precise analyses of data gathered during observation
- flexibility of analyses (possibility of introducing additional elements after field research has been conducted)

Case study: shopping path during different shopping missions

As part of our effort to demonstrate the possibilities of shopper research methods, in November/December 2007 our team carried out a syndicated research project entitled 'Shopper Insight'. The project, amongst various other shopper-related topics, analysed clients' shopping paths depending on the type of shopping mission (current shopping or stock-up shopping) and was based on observations made using the Eye-tracking technique. The results are an excellent demonstration of the possibilities offered by this technique and are proof that such methods deliver results which by far exceed traditional techniques with regard to the scope of the data, accuracy and, as a result, actionability.

Shopping path decoded thanks to eyetracking

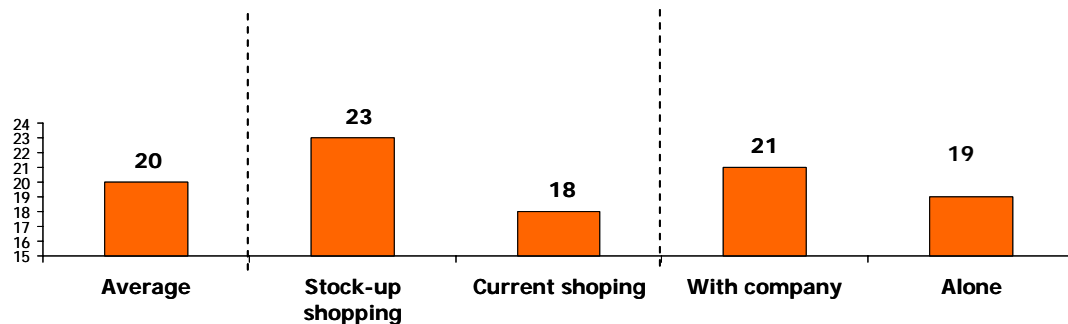
Analyses of data gathered during the observations makes it possible to present a complete and in-depth picture of shopping paths during various types of shopping trips. In some cases, the results shed new light on some common "myths" about shopping, proving that although widespread, they are not always true – in particular, this concerns beliefs about the differences in shopping habits between men and women. A good example regards the duration of a shopping trip: women spend double the time on current shopping than men do, but men devote 1/3 more time to stock-up shopping than women. The duration of the shopping trip is not influenced by the presence of an accompanying adult person but when the shopper is accompanied by children, shopping tends to take more time.

A big surprise is the fact that in some cases the duration of current shopping trips was longer than that of stock-up shopping trips. The key reasons for this included:

- Current shopping is treated more in terms of leisure, as a pastime, and shoppers are willing to devote more time to such a trip
- Shoppers on current shopping trips tend to reach more often for new products, which is more time consuming
- Some shoppers were not able to control their time in the store

The study also analysed the type and number of shelves visited by shoppers conducting both types of shopping trips. During stock-up shopping respondents visited 12-40 shelves, whereas during current shopping they visited 7-30 shelves. Shoppers usually visit ~ 25% of all shelves with FMCG products and none of the observed shoppers visited more than 50% of all FMCG shelves.

Number of shelves visited



Source: GfK Polonia Trade Research and Consulting syndicated study, n=50

The observation confirmed that the more shelves the shopper visits, the more he or she purchases. An interesting fact is that gender has no influence on the number of shelves visited – so there should be some revision of the theory that women shop in a more spontaneous manner than men. Shoppers who go on their shopping trip together with another person tend to visit a larger number of shelves than those who shop on their own. The most often visited areas in the store are those with fresh products (meat, vegetables, bread) and they are also the most time-consuming areas.

The above research study presents just a small fragment of the possibilities offered by new observation technologies. One of the more interesting areas of application of such methods is the observation of the impact of promotional displays and POS materials on shopper behaviour which allows marketers to assess the effectiveness of promotion and POS material.

We have no doubt that in future years we will see further development in such technologies which will allow us to provide an even deeper insight into shopper behaviour. We also hope that the positive attitude of marketers towards such methods will be expressed by a growing number of studies of this type being commissioned.



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