

If you think you can't trust a salesman to tell you the truth, try talking to a shopper.

By Peter Wilson

Abstract

Up to 80% of shopping decisions are made subconsciously (Scamell-Katz, 2006). I will question the validity of utilising conventional research methodologies that elicit post-rationalised responses when compared to measures of actual shopping behaviour. Retail marketers are embracing the insights gained from shopper research that provide accurate measures of shopper behaviour. I intend to show what the risks are of utilising the inappropriate methodologies to measure purchase decision-making without taking into account the role of the subconscious in this process.

Introduction

“Not every discovery can be accounted for in the same manner, and procedures that paid off in the past may create havoc when imposed on the future” (Feyerabend, 1988)

Take a moment to imagine yourself as a typical research respondent. You are at home one evening, perhaps bathing the children or preparing dinner for the family. The phone rings and a charming voice on the other end of the line convinces you to give up 15 minutes of your precious time to play back aspects of your last shopping trip to your local supermarket. At this juncture, the children are calling you from the bathroom or there is a pot boiling over on the stove. Be that as it may, you agree to reflect back on the reasons why you chose to buy the can of baked beans that you did, what other brands you considered before making your choice, and whether there was any point-of-sale material that influenced your purchase in any way. Now one might argue that in the case of the tin of baked beans, there is a good chance that you knew exactly what brand you were going to buy, and you probably didn't look at competitive offerings, let alone any point-of-sale material. But what about that bottle of wine that you bought for the dinner party you were having? We know that the wine category is one that enjoys higher levels of engagement in-store than perhaps that of tinned foods, and for this reason the complexities around the decision-making process come to the fore. The question is - can you really play back exactly what happened in-store to the point where you made the decision to buy that particular tin of baked beans or bottle of wine? Do you know exactly what brands you considered before making your final choice, or can you remember if there were any particular influencers in-store that led you to make the decision you made? Did you even think about why you made the decision you did?

Picture yourself now as the candidate respondent for an accompanied shop exercise. The researcher will accompany you as you go about your shopping exercise and make notes or capture the brands that you interact with and those that you ultimately buy. You remember that you need to stock up on shampoo and therefore proceed to the hair care aisle. With the rise in inflation and other economic pressures having an impact on your disposable income, you have recently chosen to trade down in many

categories, including shampoo. But this particular shopping trip is different. Someone is keeping a close eye on your purchases and maybe, subconsciously, you wouldn't want them to believe that you are being thrifty. So the premium brand shampoo ends up in the shopping trolley and the cheaper alternative that you have been using for the last three months is left on the shelf. After all, the incentive you will be given by the researcher after your shopping trip will cover the additional amount you paid for the premium brand of shampoo.

Lastly, you are invited to a focus group discussion. In this discussion, the moderator asks you about your attitudes to supermarket private label goods. As you are now in the company of strangers, there is a chance that you will downplay the private label offerings in favour of premium branded alternatives, in order to appear more discerning. In addition, the moderator may present you with some concepts for a new promotion soon to be launched in your favourite supermarket. You are asked whether you would notice the point-of-sale material in-store and whether it would influence your purchase decision. The answer possibly will be an unequivocal yes on both counts and you may very well mean it, but will it really catch your attention in-store? In all likelihood, you will walk straight past it as you focus on your shopper mission. In a study conducted by TNS Magasin for a grocery retailer, in which a buy-one-get-one-free promotion was located at a gondola end, it was found that only one-third of shoppers who selected from the gondola end picked up a second pack. They recognised that there was an offer but failed to take in what the offer was (TNS Magasin, Grocery retailer – whole store study: filming and interviewing, 2003).

These examples illustrate how a poorly executed research plan can render some vastly inaccurate insights.

As researchers, we have traditionally preoccupied ourselves with the consumer and the relationship that they have with brands. We have historically fed back to our clients measures of brand salience, and usage and attitudinal behaviour, as a means of establishing the strength of a client's brand within the variety of brands available to the consumer. While this information is critically important in developing marketing strategy, it may miss some of the opportunities and challenges presented by the purchase decision itself. We have spent little time focusing on the shopper, who

could indeed be the consumer or one who is shopping on behalf of the consumer. Whilst we acknowledge that the shopper plays an enormous role in terms of the brand selected at the shop shelf, we have preoccupied ourselves with the ultimate consumer, in the belief that the loyalty displayed by the consumer to the brands that they use, plays the over-arching role as far as brand choice at the shop shelf is concerned. There are some who believe that an average of 70% of brand choices are made at the shop shelf (POPAI, 1995). Whilst we should not discount that a shopper's brand equity predisposition will ultimately impact on the choices made at the shop shelf, we absolutely cannot ignore the role of the shopper and the impact they have on brand choice.

“The industry has come to realize that the consumer who uses the product may not be the one purchasing it (e.g. a mother buys the cereal that her children consume). Some companies refer to this as the ‘chooser’ (shopper) and the ‘user’ (end consumer). In some instances these are different human beings, in other instances they are the same person. Understanding this differentiation enables marketers to develop appropriate strategies with the most effective mix of media and messaging to target the right segments of consumers and shoppers” (GMA/Deloitte, 2007).

Figure 1 highlights the differences between what is important for a consumer of coffee versus what is important for a shopper of coffee. In essence, the jar of coffee has to play two roles – one for the shopper, and one for the consumer.



Figure 1: Differences between coffee consumers and coffee shoppers

Due to the preoccupation we have had with consumers, we have applied traditional consumer-based thinking to the research we conduct with shoppers. It is my belief however, that shoppers should be treated differently, due to the big influence of subconscious behaviour on decision-making, and the power it has over the ultimate purchase decision in-store.

“The importance of the store is not to be underestimated and this can be achieved by integrating the store into the marketing mix by communicating effectively and creating value for the shopper. The key is to win the first moment of truth, that is to say, get and keep the attention of the shopper at the point of purchase where a massive 70% of buying decisions are made” (Wiegandt, 2006).

If this is the case, the responsibility of marketing research practitioners should be to ensure that the most appropriate shopper research methodologies be applied for the collection of data.

In his article entitled ‘Marketing in the Era of Long-Tail Media’, Joel Rubinson (Rubinson, 2008) highlights six challenges marketers and media companies face. One of these is research relevance. He mentions that traditional survey and qualitative research are not the only sources of information and insights about consumers that marketing can turn to. In addition, he states that research needs to embrace

integration, broadening its scope to include behavioural analytics. Does this mean that marketers will become more discerning in their endorsement of research methodologies, and ultimately marketing research suppliers? If so, marketing research suppliers will be under increasing pressure to render accurate and reliable insights off the back of relevant research methodologies.

If Sir David Ogilvy (Ogilvy, 1963) is correct in his statement that “the consumer does not behave as he says, he does not say what he thinks, and he does not think as he feels”, then the research community need to ensure that they are utilising the appropriate tools to capture the essence of this subconscious behaviour.

I have therefore chosen to critically evaluate the role of traditional research methodologies by comparing some of these to actual measures of shopper behaviour, and thereby to establish whether there are inconsistencies between what shopper respondents tell you via their post-rationalised recollections versus what we note of their actual behaviour in-store.

Rationale for the study

Having witnessed several case studies of the difference between what the shopper did and what the shopper said she did, I decided to embark on an exploratory journey of my own, in which I could compare data within the confines of a study that incorporated multiple methodologies. It is my endeavour therefore to determine whether there are in fact differences between what the respondent tells us and how they behave in the retail environment.

Let me share some of the case studies I have been exposed to via research conducted by TNS Magasin, a specialist shopper research organisation in the United Kingdom.

Firstly, based on the fact that 80% of shoppers shop the same store every week, a cognitive map is learned of the store, in other words we grow accustomed to the layout of the store and where to find different categories in relation to each other (TNS Magasin, Whole store study for a FMCG manufacturer: filming and exit interviews, 2006). It would consequently be easy to identify where the bread and milk are located, based on our knowledge of the layout of the store. With this

behaviour in mind, it was with great interest that I learned of a study conducted for a supermarket retailer in the UK, in which the filming of 400 shoppers took place, together with an exit interview. In the exit interview, shoppers were asked how much of the store they had covered. Twenty-five percent responded that they had browsed through the whole store. In reality, only 2% covered more than half the store (TNS Magasin, Whole store study for a FMCG manufacturer: filming and exit interviews, 2006). The explanation for this is that shoppers learn a map of the store and the categories they regularly visit. If a shopper does not have pets at home, they would see little need to visit the pet food aisle. Instead, the shopper will visit only the categories relevant to them, and therefore think that they have covered the store.

Another expression of the inconsistencies between the analyses of actual behaviour versus post-rationalised reflections of behaviour is expressed in Figure 2. In this study, which again combined filming with an exit interview, a deodorant shopper was asked about his levels of planning. He claimed to always buy the same product and spent very little time in the deodorant category. In fact, he declared that he moved in and out of the aisle quickly. The filming footage revealed that he interacted with at least three deodorants on the shelf. With one of the deodorants, he removed the cap and sprayed the deodorant into the air to smell the fragrance (TNS Magasin, Deodorant study for a FMCG manufacturer: Filming and exit interviews, 1999).



Figure 2: Deodorant shopper

In a study conducted in the home entertainment category in 2007, a third of shoppers claimed that price helps them to make a purchase decision. Via the eye-tracking data¹, it was discovered that fewer than 5% of all fixations were on price (TNS Magasin,

¹ The eye-tracking methodology will be explained under 'Research methodology applied'

Home entertainment study for a home entertainment supplier: filming, exit interviews, eye-tracking and in-depth interviews, 2007).

The difference between actual store behaviour and post-rationalised reflections of behaviour is perfectly illustrated in this shopper study (TNS Magasin, Shopper study conducted for a FMCG company: filming and exit interviews, 2006). Respondents were asked, via an exit interview, approximately how long they had spent in the store. This was compared to filming data in which the shopper's actual time in the store was measured. Figure 3 clearly illustrates the difference between the data derived from the exit interview and the filming data. After 25 minutes, shoppers believed that they spent more time in the store than they actually did. This suggests that the experience was not enjoyable for them.

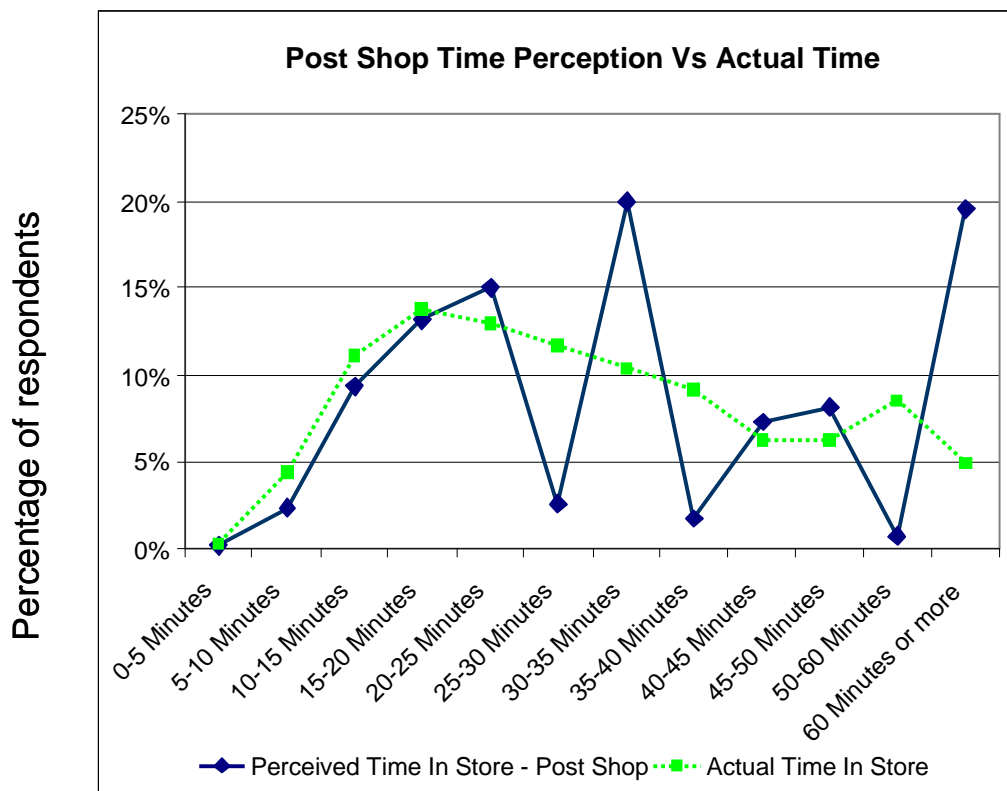


Figure 3: Perceived time spent in store versus actual time spent in store

Against the backdrop of Malcolm Gladwell's best-selling book, Blink: The Power of Thinking Without Thinking (2005), it is fascinating how respondents have the ability to over-rationalise their behaviour in the process of playing their experiences back to

an interviewer. It was in Blink (2005), that Gladwell introduced the world to the concept of ‘thin-slicing’, or the ability to select what is important from a limited frame of reference, or in other words decisions made on the spur of the moment are often equal to or better than those that were preceded by a logical thought process.

Research methodology applied

In order to obtain a comparative measure of actual behaviour versus that obtained by qualitative probing and post store visit interviews, data from a recent multi-phase study conducted in South Africa was analysed. A leading retailer in South Africa wanted to assess the impact their new generation stores had on the customer experience, with the following primary objective in mind:

- To understand and measure the effect of the changes made from the old generation shops to the new generation shops on the customer’s shopping experience

To this end, a multi-phase qualitative/quantitative research approach was applied. The methodologies applied were in-depth interviews, filming, eye-tracking, store exit intercept interviews, and a post-shop CATI interview. Details of each of the methodologies follow.

In-depth interviews: Customers, who had visited the store at least four times in the preceding year, were recruited. In-depth interviews were conducted on-site in the new generation stores. During the interview, the respondent was presented with video footage of the old generation stores in order to provide the respondent with a comparative context. A total of 11 in-depth interviews were conducted with customers in the new generation stores.

Filming: Small static cameras were installed in the ceiling of the store. Twelve cameras were used to ensure coverage of the store. The cameras filmed shoppers over a seven-day period to ensure coverage of all trading periods and days of the week. Footage was recorded onto a digital recording box, which was located at the store. By using this form of observational research, the natural behaviour of shoppers could be analysed, as it did not interfere with shopper behaviour in any way. Prior to the commencement of the filming phase, a site survey was conducted to firstly discuss the logistics of the study with the store manager and secondly to assess the layout of the

store to ensure that the cameras were installed in the appropriate areas to provide complete coverage of the store. At this stage, a timing plan was agreed upon for the installation of the cameras to ensure little or no disruption of trading. Once the cameras had been installed, and prior to the commencement of the filming phase, a sign was placed at the entrance to the store to notify shoppers that filming was taking place for research purposes. Figure 4 provides us with an example of the type of footage acquired via the filming phase. For the purposes of this research, 150 shoppers were filmed and analysed in terms of their behaviour in the store.



Figure 4: Observational research using the filming methodology

Eye-tracking: Eye-tracking uses specialised technology to track the movement of the cornea of the eye. The technology has been adapted for shopper behaviour research in the form of a pair of glasses that are worn by shoppers as they shop. A small camera is attached to the glasses to record the scene, whilst another small camera records the movement of the respondent's pupil. The eye movement is tracked with an infra-red beam that is reflected off the cornea. Figure 5 shows an example of the eye glasses that respondents wear as part of the eye-tracking process.



Figure 5: Eye-tracking apparatus

The data from these two cameras is then captured on a small hard drive secured around the respondent's waist. A sample of 20 respondents over the age of 18 was recruited via intercept interviews, as they entered the store. Respondents were given a cash incentive to participate in the research. Respondents were never made aware of the objectives of the study, in fear that this would lead to a bias in their behaviour in-store. Each respondent then had to be calibrated using a five-point calibration process to pin-point a respondent's exact fixation point. This ensures that the eye-tracking technology is set according to the shape and size of the respondent's eye. A technician was present for each and every 'eye-track' to ensure the accuracy of the calibration and ultimately the footage. Members of the retail staff were asked to treat the respondents as normal customers. Upon completion of the eye-tracking in-store, all data was captured off the hard drive and manually watched frame by frame. In this instance, a frame represents 1/25th of a second. A fixation was recorded if the respondent fixated on the same point for a minimum of 3/25ths of a second. It has been established that the brain has the ability to register a piece of information at 3/25ths of a second (Rayner, 1998). Figure 6 shows an example of the outputs derived from this form of eye-tracking and highlights the accuracy with which the fixations are measured.



Figure 6: Eye-tracking outputs

How our eyes work

To appreciate the relevance of this eye-tracking methodology, it is important to understand how the eye works. The human eye has a visual field of about 200° but the highest number of light sensitive cells on the retina are located in the area called the fovea; this is the only part in our eyes where we are able to get a sharp and colourful image (about 1-2° of our vision). This is referred to as foveal vision

(Rayner, 1998 and Hunziker, 2006). Figure 7 indicates the location of the fovea in relation to the cornea.

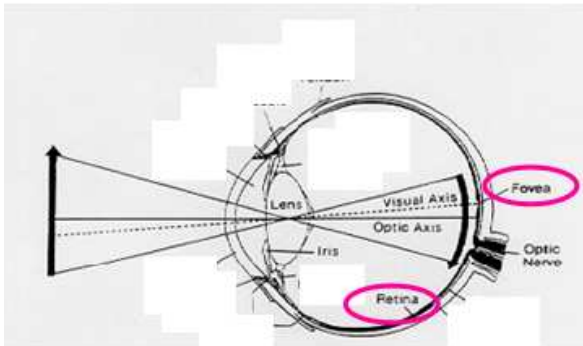


Figure 7: Location of the fovea (Rayner, 1998)

Rods and cones contribute towards sight; cones are adapted to detect colours, depth and intensity, and function well in bright light; rods are more sensitive, but do not detect colour well, being adapted for low light. In 2007, a third photoreceptor class was isolated in rodless, coneless humans, where it was found to mediate circadian rhythms, pupil reactions and a basic response to light intensity (Zadai et al, 2009). The fovea has a high concentration of cones; its centre is in fact almost exclusively cones. Our perception is slightly larger than the area of foveal vision. When we are reading text, we can read about 12 to 15 letters to the right and three to four letters to the left, which suggest that there is a perceptual span of about 18 letters around the fixation point (Rayner, 1998). Figure 8 portrays this field of vision.



Figure 8: Field of vision

There are around 10 different types of eye movement; the most important are saccades, fixations and smooth pursuit. A fixation is when the eyes stop to focus; the length of these stops is 100-600 milliseconds (usually 350ms when viewing a scene) and during this stop, the brain begins to process visual information (Rayner, 1998). A saccade is when the eyes quickly jump; the length of these saccades is 20-40 milliseconds and during this, the eyes do not send information. Smooth pursuit is when the eyes follow swift movement (likely to be horizontal) without saccading (Rayner, 1998 and Thier, 2005). It is possible to move our covert attention (the attention of the mind) around the entire visual field when our eyes are at rest. However, our foveal vision is usually a valid measure for determining the target of our covert attention as our brain can process very little information from complex stimuli (like packs) outside the fovea (Pieters and Wedel, 2007). Peripheral vision is only able to process movement and contrast. The cyclical pattern in the examination of pictures “is dependent not only on what is shown on the picture, but also on the problem facing the observer and the information that he hopes to gain from the picture” (Yarbus, 1967). “Records of eye movements show that the observer's attention is usually held only by certain elements of the picture. Eye movements reflect the human thought processes; so the observer's thought may be followed to some extent from records of eye movements (the thought accompanying the

examination of the particular object). It is easy to determine from these records which elements attract the observer's eye (and, consequently, his thought), in what order, and how often" (Yarbus, 1967).

Store exit interviews: Upon completion of the eye-tracking exercise, the 20 respondents were asked to participate in a short interview of no more than 10 minutes. The interview gave the respondents the opportunity to 'play back' their experiences in-store. The questionnaire was consequently designed according to this framework:

- Measuring the ease of navigation around the store
- Attribute association, based on the store visited
- Point-of-sale material noticed upon approach to the store
- Point-of-sale material noticed in-store
- Association of the retail brand with a big South African sporting event (the retail brand is a big sponsor of a South African sporting event and this association was featured prominently in-store)
- Reasons for visiting the store
- Frequency of visiting the store
- Behavioural statements
- Demographic questions to record gender and ethnic group

Post-shop CATI interview: Data was extracted from a quantitative telephonic tracking survey, which measures customers' attitudes and perceptions regarding the service that they received from the retailer. The survey has been designed to collect data for a period of 11 weeks on a biannual basis at a national and regional level. Past seven day visitors to the store are interviewed over the telephone about their experiences when visiting the store. For the purposes of this research, data was extracted from this study for store visits that would have taken place whilst the filming, eye-tracking and exit intercept interview research was being conducted. The data was filtered on the particular store that forms the focal point of this research. The number of interviews conducted during the specified time was 60.

Questions common to both the store exit interview phase and the customer satisfaction phase were analysed alongside data derived from the filming and eye-tracking phases, and insights obtained from the qualitative in-depth interviews. The

data from the interviews was compared to data from the filming and eye-tracking to determine whether there were any differences between what the respondent saw and what they told us they saw.

Figure 9 provides a diagrammatic summary of the different methodologies applied in the study.

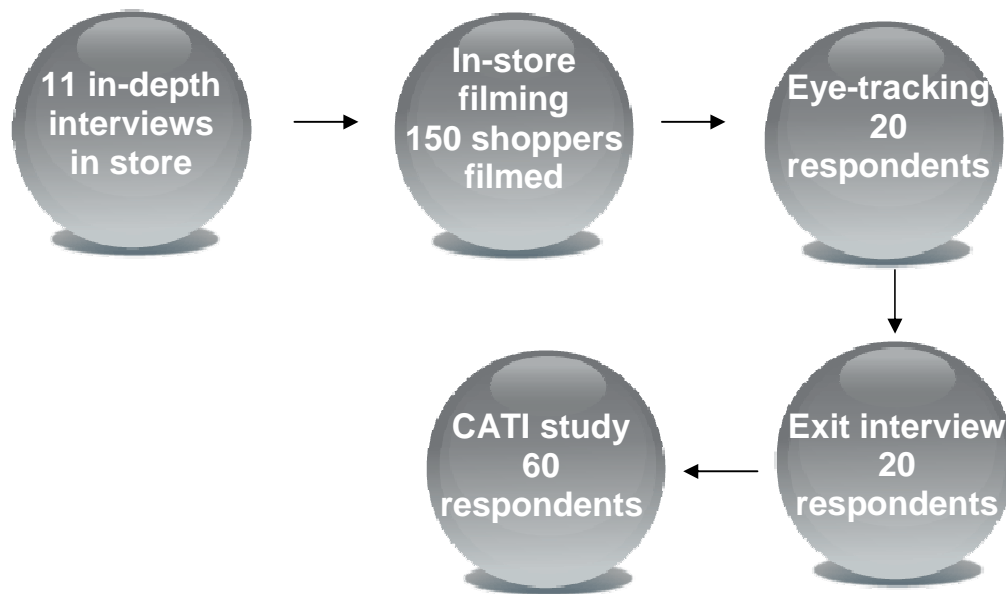


Figure 9: Summary of research methodologies applied

Research findings

As multi-phase research was conducted, plenty of opportunity was provided for the comparison of data captured from filming of actual behaviour (filming and eye-tracking) and data derived from interviews conducted with shoppers. What follows is a comparison of these data sets.

What did shoppers see before entering the store versus what they told us they saw?

The in-depth interviews yielded some interesting insights regarding the window displays. Respondents were very complimentary about the design of the window displays. Many highlighted the window displays as one of the notable improvements made to the store via the new store design. Some of the respondents in fact

mentioned how much they enjoyed watching the window displays before entering the store. Some of the respondents believed that moving advertisements would be more effective in catching the attention of the shopper, whilst others mentioned that they were more likely to read bold posters with fewer subscripts. Smaller subscripts were seen to be an effort to read and therefore not very reader-friendly.

“The display looks modern. You can see it nice and clearly. When I stood outside, the information presented was sufficient without needing to enter and enquire”

(in-depth interview respondent).

Whilst this exercise yielded positive feedback for the client on their window displays, the question had to be asked, “How many people are seeing the window display?” Via the eye-tracking data, the answer was not very many. In fact, only six of the twenty of the eye-tracking respondents (30%) looked at the window displays prior to entering the store. This is consistent with studies conducted elsewhere in the world. It has been found that shoppers are in navigational mode prior to entering the store, look for stimulation through store entrances and merely glance at store windows (TNS Magasin, Retail outlet study for a fashion retailer, filming and exit interviews, 2000). Store entrances provide shoppers with an opportunity to gauge the offer and look for something to entice them into the store. Store windows on the other hand, function at least in part as a guide to where the entrance is (TNS Magasin, Retail outlet study for a fashion retailer, filming and exit interviews, 2000). In a study conducted by TNS Magasin in the United Kingdom, for a clothing retailer, which incorporated in-depth interviews and the eye-tracking methodology, it was concluded that:

- The structure of the store is heavily fixated
- Mannequins receive the highest number of fixations
- Other elements of the window receive very few fixations, with the store fascia being rarely fixated
- The limited spontaneous recall focuses on products specifically; however, consumers say that the windows give them a general impression of the store
- Prompted reactions to the window display are unenthusiastic, until the shopper is asked to stand in front of the window. Then, they will discuss POS and product; however, this level of involvement is not part of the

normal shopping process (TNS Magasin, Retail outlet study for a fashion retailer, filming and exit interviews, 2000). This is consistent with the findings from the South African research study under review in this paper.

There were, however, some congruencies between what the respondents said via the in-depth interviews versus what we have derived from the eye-tracking phase of the study and eye-tracking trends overall. Respondents in the in-depth interviews highlighted the need to make the signage outside the stores bigger and more visible to the shopper. In addition, respondents requested that the signage should be at eye level instead of higher up over the entrance to the store.

“If I don’t look up I will not know that this is a xxxx² shop. Maybe that sign should move down a bit. Maybe some more xxxx on the windows. You can’t see that unless you are coming from far away” (in-depth interview respondent).

The eye-tracking data revealed that not one respondent fixated on the store logo above the door. There is some truth in the old retail adage that ‘eye level is buy level’. Siemon Scamell-Katz (2006) draws from eye-tracking norms generated from more than 20 eye-tracking studies, and indicates that eye level is in fact 15-30 degrees downward, i.e. between waist and chest height. This is explained by the mere fact that the head is quite a heavy part of our bodies, and we humans therefore tend to relax by dropping our heads slightly downward. Yee (2009) established that the adult head above vertebra C3, with no hair, weighs between 4.5 kilograms and 5 kilograms, constituting approximately 8% of the whole body mass. Figure 10 illustrates the 15-30 degree angle from the point of view of the average shopper.

² The name of the client has been retained to protect confidentiality.



Figure 10: Eye level explained

Upon analysis of the post eye-track exit interview, it was interesting to note that six of the respondents (30%) did not notice anything in the window displays. This is congruent with what was found in the eye-tracking data, i.e. low levels of visual intensity directed to the windows. Findings regarding point-of-sale material at entry were also similar. The 69% of fixations on point-of-sale material were attributed to only six of the respondents (30%). Of the 16 fixations on or through the window, 11 of these fixations were on point-of-sale material in the window. Tables 1 and 2 put this data into context.

Summary of Fixations – Type - Approach to enter store	No. Sample	% Fixations
POS	6	69%
Product	3	19%
Service Counter	1	6%
Shop Assistant	1	6%
Total	20	16

Table 1: Eye-tracking data – fixations by type - approach to enter store

Summary of Fixations – POS Type – Approach to enter store	No. Sample	% Fixations
Window Sticker	2	36%
Poster	3	27%
Service Counter Information Stand	2	18%
Doormat	1	9%
Mural	1	9%
Total	20	11

Table 2: Eye-tracking data – fixations by POS type – approach to enter store

The exit interview data reflected that nine of the respondents (45%) noticed some form of point-of-sale material³ in or through the window. Whilst point-of-sale enjoyed the highest levels of recall, the fact still remains that many of the respondents who wore the eye-tracking glasses failed to notice anything in the window display or struggled to articulate too much information on what they recalled. “TV screen”, “Adverts”, and “Stickers on the door” were some of the verbatims captured from the open-ended question in the exit interview.

What shoppers saw in-store, what they told us they saw in-store, and what they said was important to view in-store?

For this part of the analysis, I have chosen to compare the qualitative data with the eye-tracking data. In addition, I have analysed the data from the CATI study, to determine whether there is any incongruence across the methodologies. Firstly, the data derived from the CATI study was compared to the eye-tracking data in terms of what was noticed in-store. Aided recall figures obtained from the CATI study indicated that 33% of past seven day shoppers in the store recalled seeing pictures or signs associating the retail brand with a major sporting event in South Africa, while 58% recalled seeing an area in-store that highlighted one of the retail brand’s core offerings (something that they have spent a vast amount of money supporting through mass media communication), and 63% recalled seeing a big screen in-store. Figure 11 indicates the difference between the data derived for the CATI study and the data derived via the eye-tracking methodology, whereby the recall percentages are compared with the number of respondent fixations.

³ For the purposes of this study, point-of-sale material included products on the floor, floating displays, pillars, window stickers, wall displays, murals, branded door mats, cabinet displays, information stands, big screens, and posters

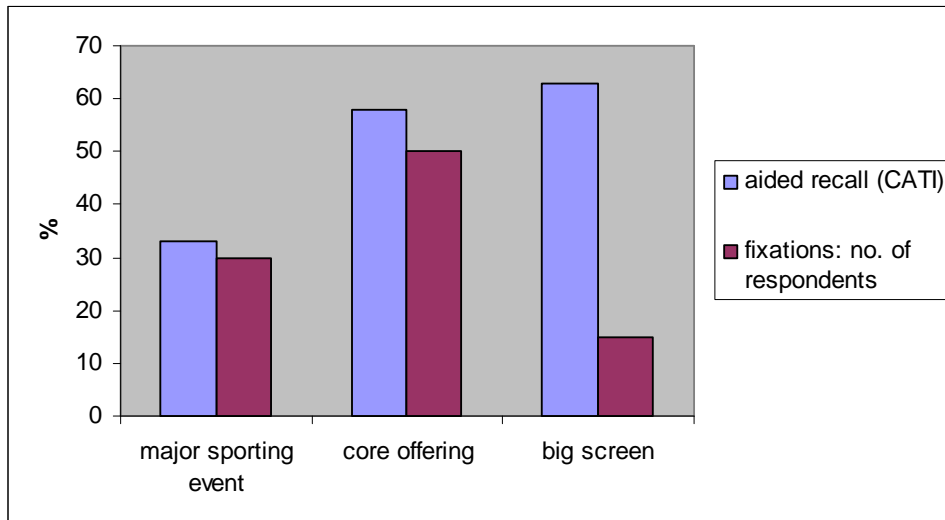


Figure 11: Recall versus number of respondents who fixated

Figure 11 shows discrepancies between the CATI study data and the eye-tracking data. From the outset, it appears that there are correlations between the CATI study data and the eye-tracking data, particularly when one looks at the comparisons of the data for the major sporting event and the core offering. It is important to note that both the major sporting event and the core offering enjoy vast amounts of marketing communications support and this may have an impact on the aided recall figures achieved. There is a vast difference between the aided recall measure and the fixation measure for the big screen. This reading is quite concerning, as it indicates that 63% of the CATI sample recalled noticing the big screen in the shop, but only three of the eye-tracking respondents (15%) actually looked at it. Remembering that this was an aided recall question, it appears that the majority of respondents in the CATI study assumed that they had seen the big screen, when in effect there is a good possibility that this was something that they did not notice in the store. The CATI study data leads us to assume that there is a vast amount of over-claim expressed by the respondent, which could be partly attributed to the fact that the responses were prompted in this particular study. Admittedly, to expect the respondent to recall what they noticed in-store after a minimum of seven days has lapsed since their store visit, is both unrealistic and ambitious. This is often the approach taken with advertising tracking studies, which are flawed for the same reason.

Upon closer inspection of the eye-tracking data, it was found that of the sample of 20 respondents, only six people (30%) looked at the promotional material associated with the retail brand's sponsorship of the sporting event, ten people (50%) looked at posters promoting the core offering, and three people (15%) looked at the big screen. I stress that I have purposefully distinguished between 'looking at' and the percentage of total fixations for each of these items, where the proportions of fixations are comparably low (2%, 19% and 5% respectively). Figure 12 diagrammatically portrays these differences.

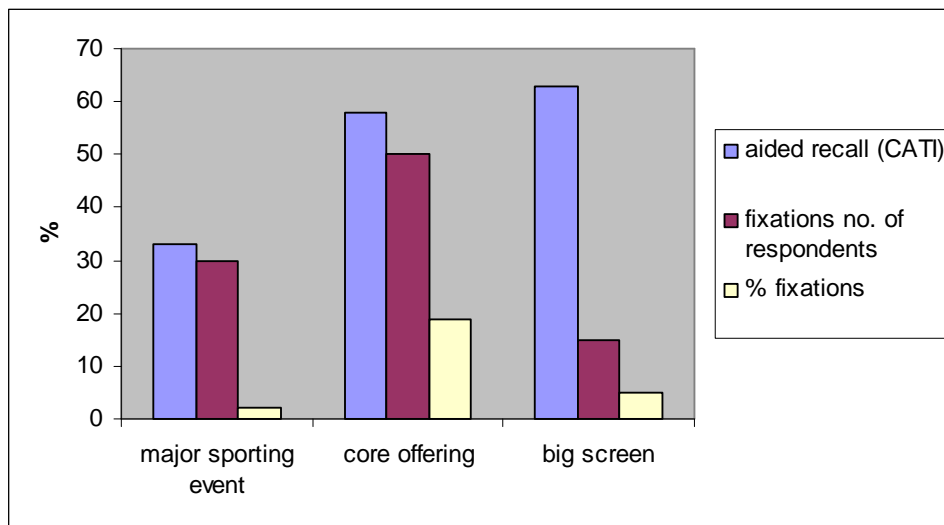


Figure 12: Recall versus number of respondents who fixated and percentage of fixations

Figure 12 provides a very clear comparison of what respondents are looking at in the store, compared to what, if anything is attracting high levels of visual interest. The difference between the number of respondents looking at the major sporting event material and the amount of 'dwell time' it is receiving, are quite broad. While 30% of the respondents looked at the major sporting event material, it only enjoyed 2% of the fixations in-store. One can therefore deduce that this area enjoys very low levels of visual impact. The core offering generates the most amount of visual interest from the respondents, with 50% of the eye-tracking respondents looking at the area and 19% of all in-store fixations being attributed to the area. The interplay between those who looked at the big screen and the portion of fixations it receives, is a lot closer than for the major sporting event and core offering. While 15% of the respondents

looked at the big screen, it generated 5% of all fixations in-store. Again, we see a vast difference in the data derived from the eye-tracking versus what was generated from the aided recall question in the CATI study. When one looks at the data from the exit interview, the issue of the post-rationalised response becomes even more apparent. The exit interview questionnaire featured the same questions as those that were analysed in the CATI study, except that the responses were unprompted. Figure 13 depicts the comparison of this data with the results from the CATI and eye-tracking phases of the study.

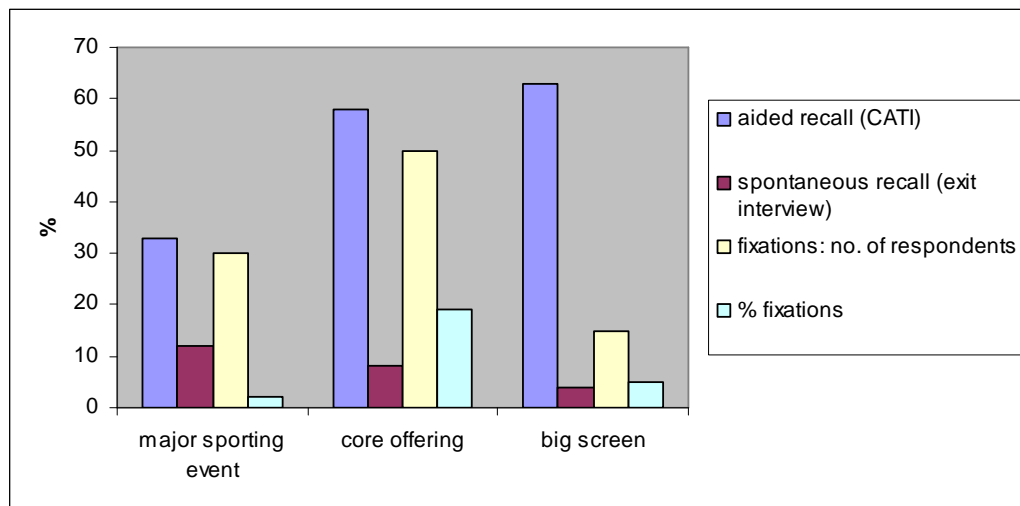


Figure 13: Aided recall, spontaneous recall, and fixations

The spontaneous recall data derived from the exit interview does yield a more accurate comparison to the eye-tracking data. This is explained by a couple of factors:

- The interview takes place immediately after the visit to the store and the respondent's recollections of what they saw are therefore fresh in their minds.
- The responses are unprompted, which therefore renders a more accurate picture of what they recall seeing and also limits any possible 'halo effect' by a prompted awareness question.

There are, however, significant differences between these post-rationalised and cognitive measures of behaviour versus the measures of actual behaviour. The comparison of the three sets of data highlights the issue in terms of capturing real and

accurate data about what people notice in-store versus relying on the respondent to cognitively play back what they believe they saw.

When comparing the qualitative insights, derived from the in-depth interviews, with the eye-tracking, filming, CATI, and exit interview data regarding the product displays in the store, the distinction between what a respondent is prompted to look at, versus what they actually saw, becomes apparent. In the in-depth interviews, respondents declared that the product displays were far more visible in the new generation stores. The layout of these new generation stores was believed to facilitate easy viewing, particularly whilst waiting in a queue or walking around the store. The glass and chrome displays were seen to be eye-catching, to the extent that many respondents mentioned the eye-catching product displays spontaneously. The product displays were seen to be modern and open. Most respondents believed that the products featured in the displays were ‘well-spaced, clearly visible and uncluttered’.

“The neatness of the displays is just as well done from the outside. The displays are different now, it looks better than the old-fashioned displays they had. You don’t see these glass boxes every day. It is something different...It is in a more modern style”
(in-depth interview respondent).

The eye-tracking data revealed that whilst 17 of the 20 respondents (85%) fixated on the product displays, only 20% of the fixations in-store were on product displays. Whilst respondents in the qualitative research were very complimentary of the product displays on the floor, particularly in terms of their accessibility whilst queuing or walking around the store, the product displays on the floor only attributed to 29% of all fixations on product displays in the store. Interestingly, it was 13 of the 20 respondents (65%) that generated 29% of fixations. By contrast, fewer respondents (eight of the 20 or 40%) looked at the wall displays, yet 49% of all fixations on product displays in the store were attributed to the wall displays. In summary, the wall displays enjoyed the highest visual impact of all the product displays in-store. Table 3 indicates the relative portions of fixations attributed to the different types of product displays in the store.

Summary of fixations – Product displays	No. of respondents	% Fixations
Wall display	8	49%
Products on floor	13	29%
Cabinet display	15	22%
Floating display	4	1%

Table 3: Fixations on product displays

Upon inspection of the filming data, a similar story unfolded to what was seen in the eye-tracking data. Table 4 reveals the relatively low levels of engagement with the product displays in the store.

Sequence of areas interacted⁴	% sample
Product display only	14%
Account payments counter then product display	13%
Product display then account payment counter	7%
Service counter then product display	4%

Table 4: Filmed data: product displays

When these actual measures of where shoppers went to in the store and what they saw, are compared to the post store visit interview data, a different picture is drawn of what shoppers noticed in the store. Eighty percent of the sample in the CATI study recalled that there were products and services advertised and displayed in the store. When prompted on which products and services were being offered at the shop, 68% mentioned the appropriate products and accessories. If one was to analyse the CATI study data alongside the results of the qualitative in-depth interviews, one may believe that the product displays have visual impact and attract shoppers to them. In fact, one might believe that 68% of the shoppers are aware of the products and services on offer based on an interaction with the product displays. The exit interview data, again, is a more accurate rendition of what shoppers noticed in-store with only four of the 20

⁴ Interactions are defined as those moments when the shopper actively engages with the fixture

respondents (20%) mentioning that they saw a product display on their recent visit to the store.

Conclusions

Researchers simply cannot rely on consumer research to generate insights about shoppers. While consumer research plays a vital role in determining where the brand sits in the mind of the consumer and whether it is indeed being used, there is a need for a more holistic view to be taken of marketing research, in which the interaction between the brand and the shopper needs to be understood. There is also a fundamental difference between the ways that shoppers behave in-store versus what they are able to play back to a researcher via a series of post-rationalised responses.

- Qualitative research in the form of in-store focus groups or in-depth interviews (as used in this study), is a very good way of understanding how shoppers feel about different aspects of the in-store experience. This kind of research can, however, focus on the wrong insights if it is used in isolation.
- Post store visit interviews should happen as soon after the store visit as possible, as the ability to recall the shop and what was noticed in-store diminishes over time and prompts are therefore required to remind the shopper of their experience. These prompts can render inaccurate insights as other external variables can impact on the accuracy of the data (for example, the halo effect and mass media communication). Prompted recollections of behaviour can in fact lead to gross over-claim.
- Interviews alone are not a solution recommended for shopper research as they do not allow for any measure of actual behaviour. What people do and what people say they did are often two different things. We are not consciously aware of most of our behaviour in-store and therefore it is difficult for us to reflect on our behaviour when required to do so.
- The role of window displays needs to be carefully considered. The data illustrated that shoppers are clearly in navigational mode when approaching a store. Their mission dictates their behaviour and as a consequence, much of the visual impact of window displays will be lost. The nature of the mission will dictate whether a store window is noticed or not (mission shopping versus

browsing). Generally speaking, shoppers glance at window displays but look through store entrances to gauge the offer inside.

- Signage and point-of-sale material placed too high above the shopper's head will not be noticed. In this study, the front door signage above the store front door bears testimony to this fact.
- No consistent patterns arose when comparing actual shopper behaviour with recall data. In the case of the post-shop CATI study, the interview took place too long after the shop to yield any meaningful insights.
- By comparing the number of respondents who fixated on an item with the percentage of overall fixations the item receives, we are able to derive a measure of visual impact for the item.
- By using one or a combination of the wrong research methodologies, a completely skewed picture of reality can be presented to the researcher. In any mixed methodology shopper study, a measure of actual behaviour has to be included if any value is to be placed on the research findings.

In closing

This paper serves to highlight the inconsistencies with the results of shopper research when consumer-based methodologies are applied. Further research needs to be done to identify the shortcomings of consumer research when it comes to assessing shopper behaviour in-store.

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