



Ipsos KMG

**ARAŞTIRMADA  
YENİLİKLER**  
'2010



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## Shopper Sudoku

2-in-1 Challenge of Turning  
Shopper Research into Actions

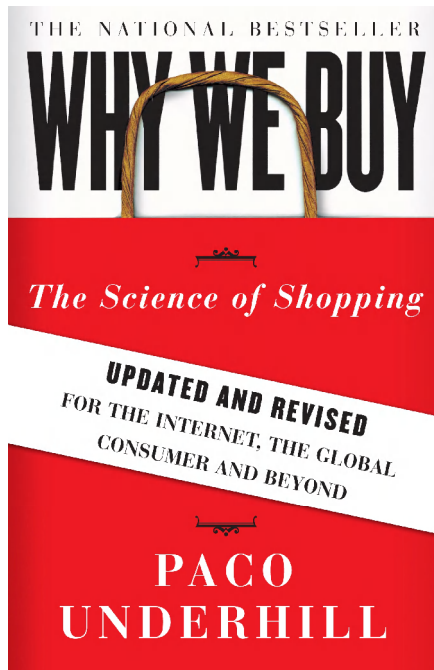


25 February 2010

Nobody's Unpredictable

# The history of shopper research

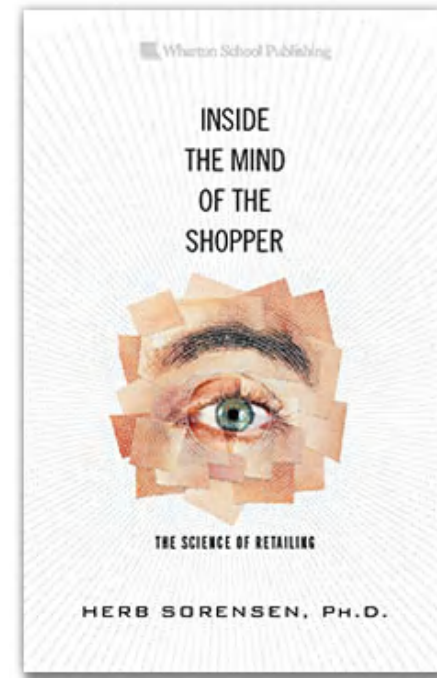
## The Birth of Shopper Research



Anthropology

‘Dr. Sorensen and Paco Underhill have been called the "Yin and Yang" of observational research.’

[www.herbsorensen.com](http://www.herbsorensen.com)



Biology

## Result: 'I know what they do'

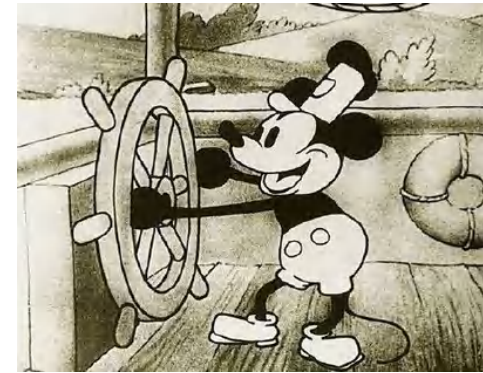
### Key Insights:

- 70% of shoppers are women
- Average time interacting from 3 minutes to 20 seconds
- Conversion rate (buy/interact) from 90% to 30%
- When entering, shoppers adapt and turn right

### Misleading/False Knowledge

- 70% of the decision is made at point of sale – NOT TRUE

## The Teen Years



## To make a difference I need MORE

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### Mid-life Crisis

- There is a lot of detail in shopper research.
- But it is no excuse for producing mountains of data, hundreds of data breaks by each brand segment and each type of shopper and each day of the week and each hour of the day.
- All in all this resulted in reports of up to 400 pages



## The rise of the consultant

- “There are no insights in research”
- Focus on supply side and operational efficiencies: long term and high revenue & margin work
- Researchers are technicians

### Opportunity to shine?





## The result: contemporary shopper research

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- “We have lots of shopper information but we find it difficult to use and overwhelming”
- Tarnished reputation due to consultants hard selling
- Hiding behind data
- How to get out?



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**Innovation in Research!**



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# Our philosophy: shoppers' journey

Three stages to the journey :

No innovation here...



## PRE SHOPPING MINDSET

Macro trends,  
Shopper  
Segmentation,  
Missions and  
Relationship with  
Category

## POP EXPERIENCE

*What is happening  
there, how it is  
happening and why.*  
How can we use this  
findings?

## END USE

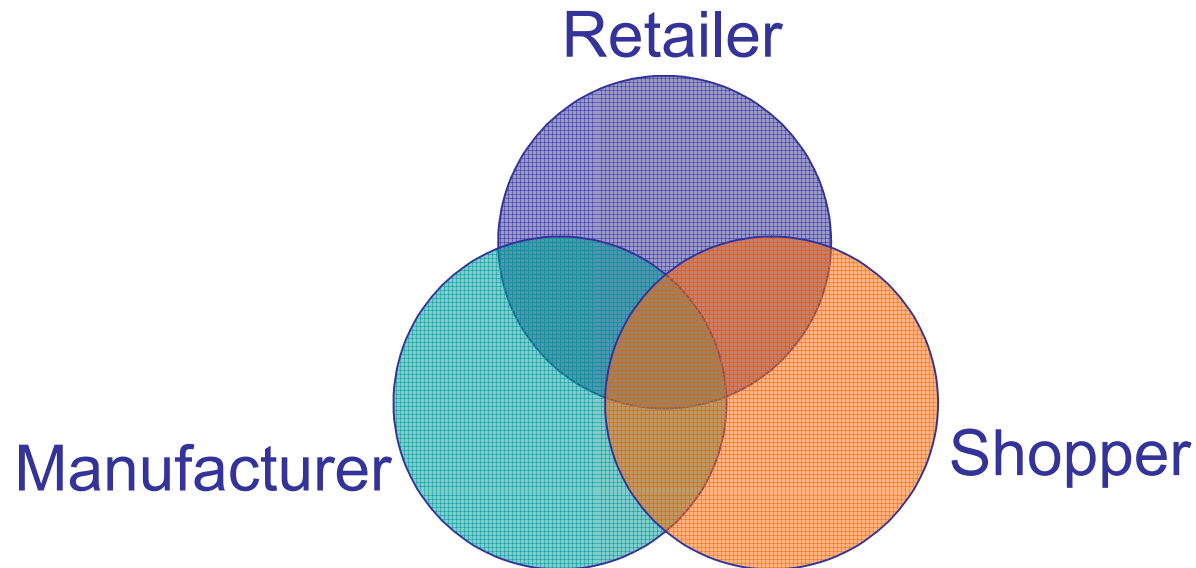
Understanding who is  
the end user and how  
the product will be  
used affects its  
shopping



## The key point:

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- Win-Win-Win – Retailers, Shoppers and Manufacturers
  - Captaincy, perception among retailers, insight on “last 3 feet” competitive landscape, etc



## How to translate 'triple win' into research?

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- Frames which work
- Starting with data collection through to delivery
- Provide concept & direction:  
focus the process





## Ipsos shopper story funnel



- Issues aimed to be answered when turning shopper insight into actions
- We need to focus on the data we have which would feed the insights for creating the actions for each part of the funnel



- How do the objectives fit with the funnel?
- Which questions are we asking for each area?
- How do we analyse the results?
- How to present shopper research?

## Not the solution...

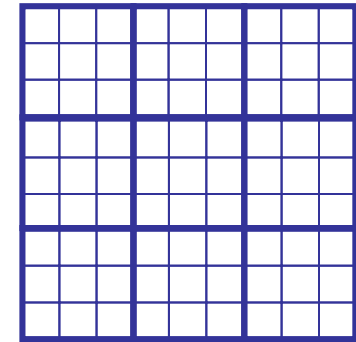
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- Re-arranging the data was not the problem
- New arrangement just highlighted the traditional descriptive shopper research
- How to turn it into action then?



## Of Ps and Ws – the missing link...

- *I keep six honest serving-men  
(They taught me all I knew);  
Their names are **W**hat and **W**hy and **W**hen  
And **H**ow and **W**here and **W**ho.*



**Rudyard Kipling** in his "Just So Stories" (1902)

- Professor **E. Jerome McCarthy**, in 1960, reduced the Marketing Mix concept to 4 (**4Ps**) elements: product, price, place and promotion.
- **Howard Garns** (March 2, 1905 - October 6, 1989) was an American architect who gained fame after his death as the creator of **Sudoku**.



# Fewer Ws more Ps

- Why?
- How?
- Where?
- 4Ps are for marketing Mix
- In Retail there are at least 6 Ps



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## The in-store sudoku

<b>WHO?</b> Who is the target shopper?	<b>WHAT?</b> What are we going to do to impact the target shopper?	<b>WHEN?</b> Is this a time dependant activity?
<b>PLACE</b> Where in store are we going to take an action	<b>PLANOGRAM</b> What are the implications for the planogram / range	<b>POINT OF VIEW</b> How to communicate this initiative to the shopper
<b>PRODUCT</b> What features do we need to focus on? How can the product best deliver to the need?	<b>PRICE</b> Is this opportunity dependent on a price point	<b>PROMO</b> Is this opportunity dependent on a Promotion

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# The in-store sudoku

**Example**

<p><b>WHO?</b></p> <p>Shopper type 3 – see full Ipsos Shopper report for full detail</p> <p>Slides 40,41,42</p>	<p><b>WHAT?</b></p> <p>Focus on store visits with no category purchase. Specifically, convenience packs. Cross display and link BTL communication with TV ads</p> <p>Slide 12</p>	<p><b>WHEN?</b></p> <p>Summer promotion for tie in, double efforts for cross merchandising on weekends</p> <p>Slides 60,61,62</p>
<p><b>PLACE</b></p> <p>Shopper 3 buys frequently fresh fruits, soft drinks, healthy snacks and biscuits – all targets for cross merchandising</p> <p>Slide 15</p>	<p><b>PLANOGRAM</b></p> <p>Follow recommendation from Ipsos Decision Tree</p> <p>Slide 94,95,96,97</p>	<p><b>POINT OF VIEW</b></p> <p>Strong tie in with mass media campaign and on make space on cross merchandising to work on health &amp; convenience</p> <p>Slide 26, 27 message</p>
<p><b>PRODUCT</b></p> <p>Opportunities for convenience packs for Shopper type 3, larger packs can also bring additional communication for promoting convenience packs</p> <p>Slide 27, 28, 29, 30</p>	<p><b>PRICE</b></p> <p>No change, must ensure that convenience packs do not cannibalise other SKU, refer to Ipsos Price@Retail Study</p> <p>Slide -</p>	<p><b>PROMO</b></p> <p>Try to keep pricing and focus on “convenience promotion”. Cross merchandising is best opportunity increasing category visibility</p> <p>Slide 55</p>

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## The Path to In-Store Actionability!

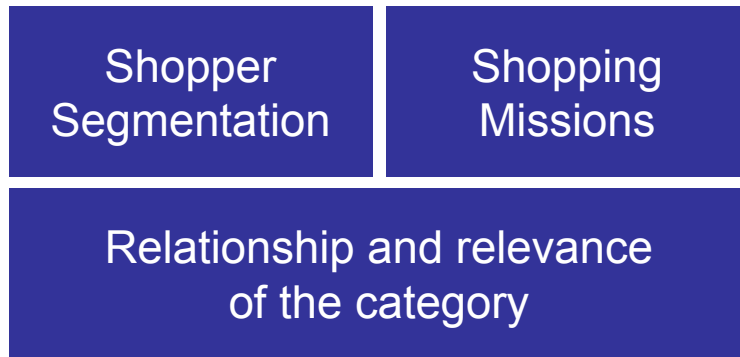


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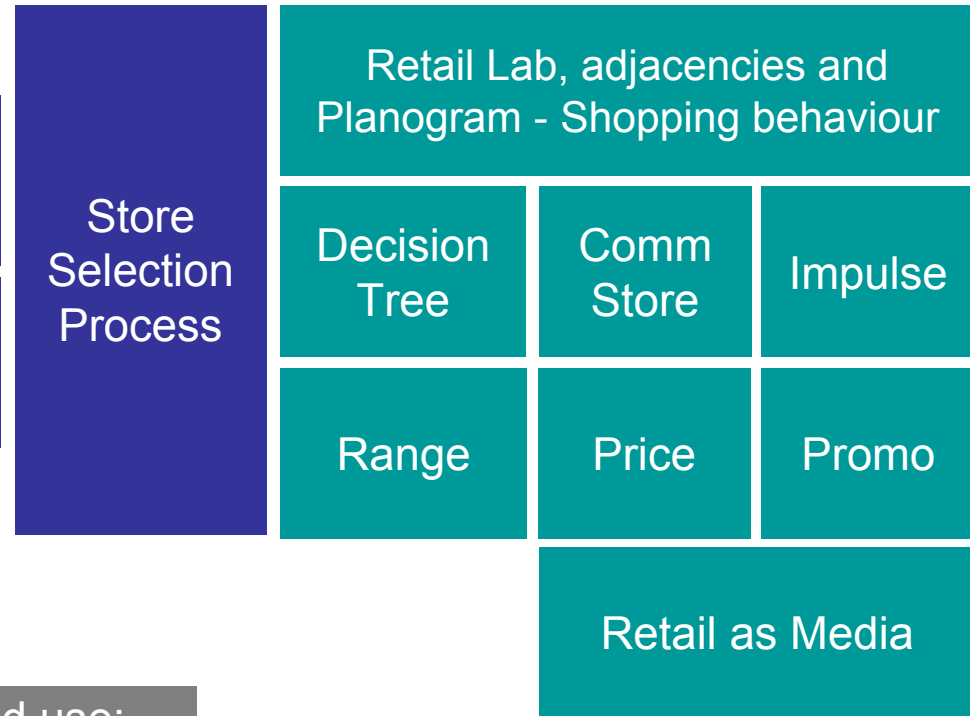


# The Ipsos approach at each stage

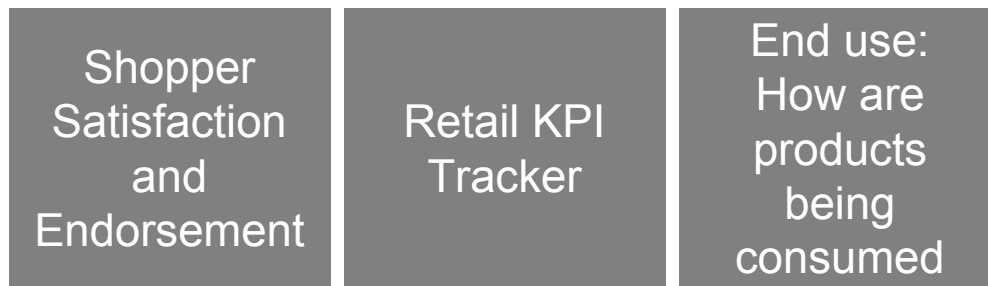
## PRE SHOPPING MINDSET



## POP EXPERIENCE



## END USE





## Ipsos Shopper Story Funnel



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## The In-store Sudoku

<b>WHO?</b> Who is the target shopper?	<b>WHAT?</b> What are we going to do to impact the target shopper?	<b>WHEN?</b> Is this a time dependent activity?
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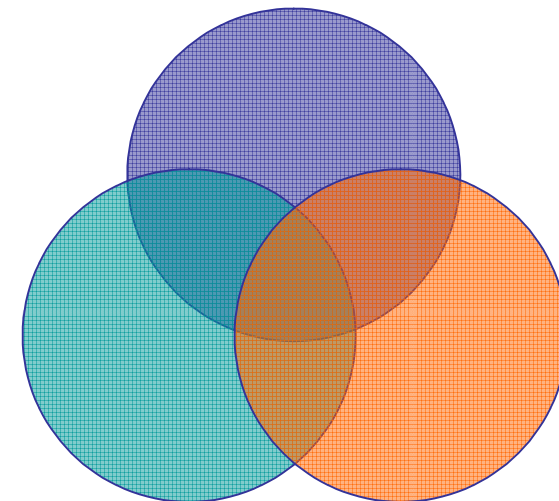
## **Actionability = Selling story**

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1. Full understanding of Shopper Research Methodology
2. Focusing on what can be delivered In-Store (Funnel)
3. Turning the data into an action plan (Sudoku)
4. How to take the action plan to the retailer?
  - If you do it will you get a triple win?

## What does success look like?

- Based on solid research
- Focused insights
- Action Plan
- Win-Win-Win  
(a proposal to work together)







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# Thank you



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