

The Last Window of Influence (July 2011): Research Objectives

- To understand which media shoppers experience in the 30 minute buildup to a shopping experience
- To establish the Recency of ad exposures
- To understand how people shop
- To gauge the potential for shoppers to be influenced by poster advertising
- To study the above by retailer group

Research Methodology

- Helen-Harrison & Company for fieldwork
- 604 face to face 'intercept' interviews with shoppers
- In street/entrance to malls, 4 locations to represent geographical region, shopping environment and day of week
- Gender and age group targets
- Quotas for retailers to be visited
- Fieldwork: 2nd July – 16th July 2011

Research Methodology

In street 'intercept'

- Neutral zones – not in station, bus shelter but close to transport hubs to sample respondents as they arrived.
- Interviewers rotated around zones to achieve retail quotas as well as all modes of transport.

At malls

- Entrances – all footfall patterns, modes of transport

Weekday/Weekend, All dayparts: 9:30am – 8pm

- Showcards to illustrate and clarify all media types and advertising environments – Outdoor, Web and mobile, press, magazines, radio

Sample Design

	Location 1		Location 2		Location 3		Location 4	
	North		North		London & SE		London	
	Manchester Arndale Centre		Leeds White Rose Shopping Centre		Croydon		Westfield	
Location Type:	High Street and City Centre Shopping		Out of Town Shopping Mall		High Street and Shopping Centre		City Centre Shopping Mall	
Day of Week:	Weekend		Weekday		Weekday		Weekend	
	Male	Female	Male	Female	Male	Female	Male	Female
Total sample:	75	75	75	75	75	75	75	75
16 - 24	15	15	15	15	15	15	15	15
25 - 34	15	15	15	15	15	15	15	15
35 - 44	15	15	15	15	15	15	15	15
45 - 54	15	15	15	15	15	15	15	15
55+	15	15	15	15	15	15	15	15
Total:	150		150		150		150	
	600+							

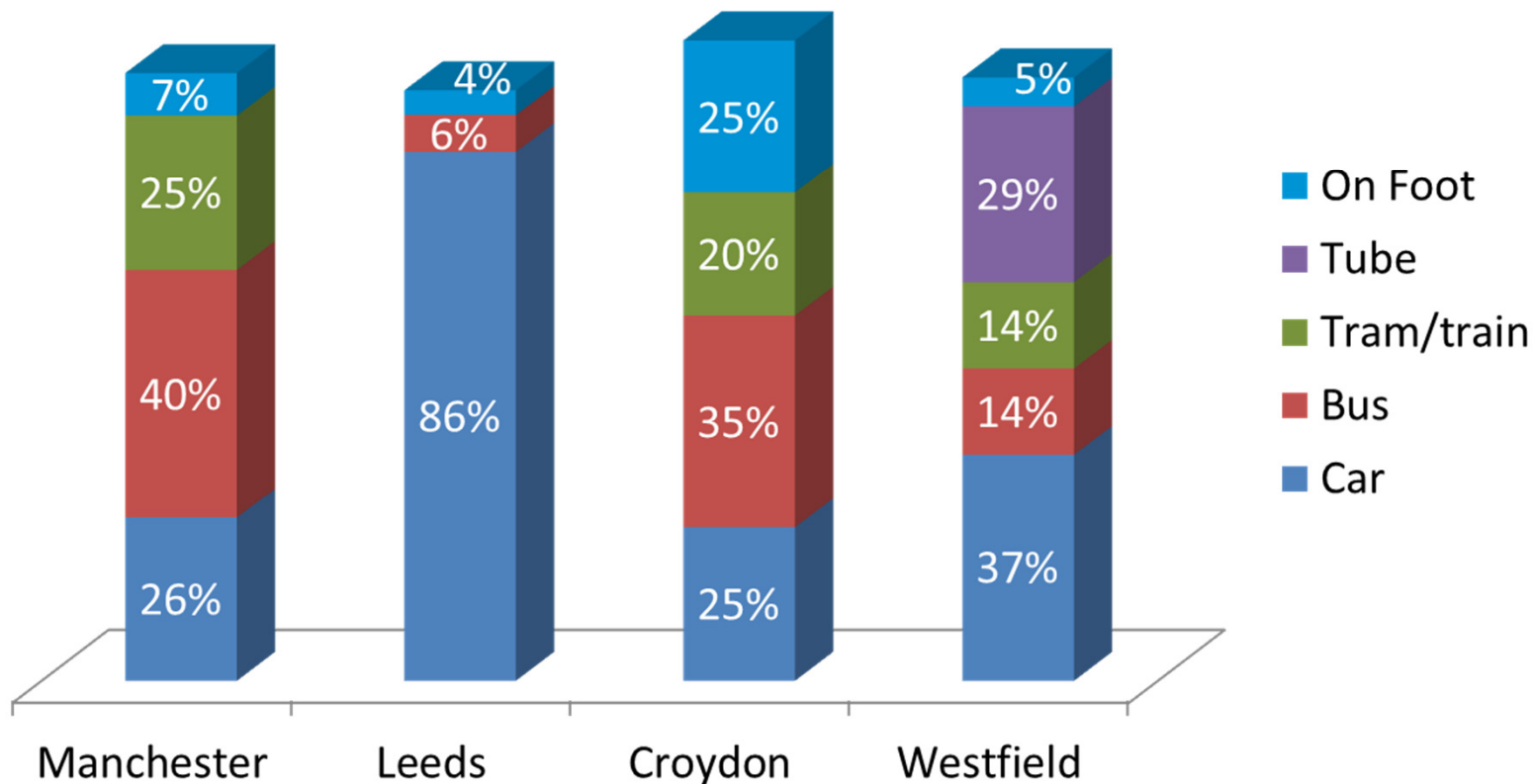
Retail Destinations of Shoppers

Additional Quotas to achieve target sample minimum 100 visitors/intend to purchase at each of the following retail outlets:

	Sample Achieved
Fashion /clothes	437
Fast Food	248
Banks / building societies - cashpoint	210
Chemists	196
Telecom /mobile phone	190
Supermarket	184
Newsagent/CTN	133
Travel Agents - currency exchange	86

Shoppers' Modes of Transport by Location

Modes of transport vary significantly by location



Source: Helen-Harrison & Company, July 2011, 604 intercept shopper interviews, 4 UK locations

Outdoor showcard (London)



- Seen / heard in last 30 minutes
- Seen / heard in last 24 hours
- Seen / heard during past week
- Seen / heard longer ago

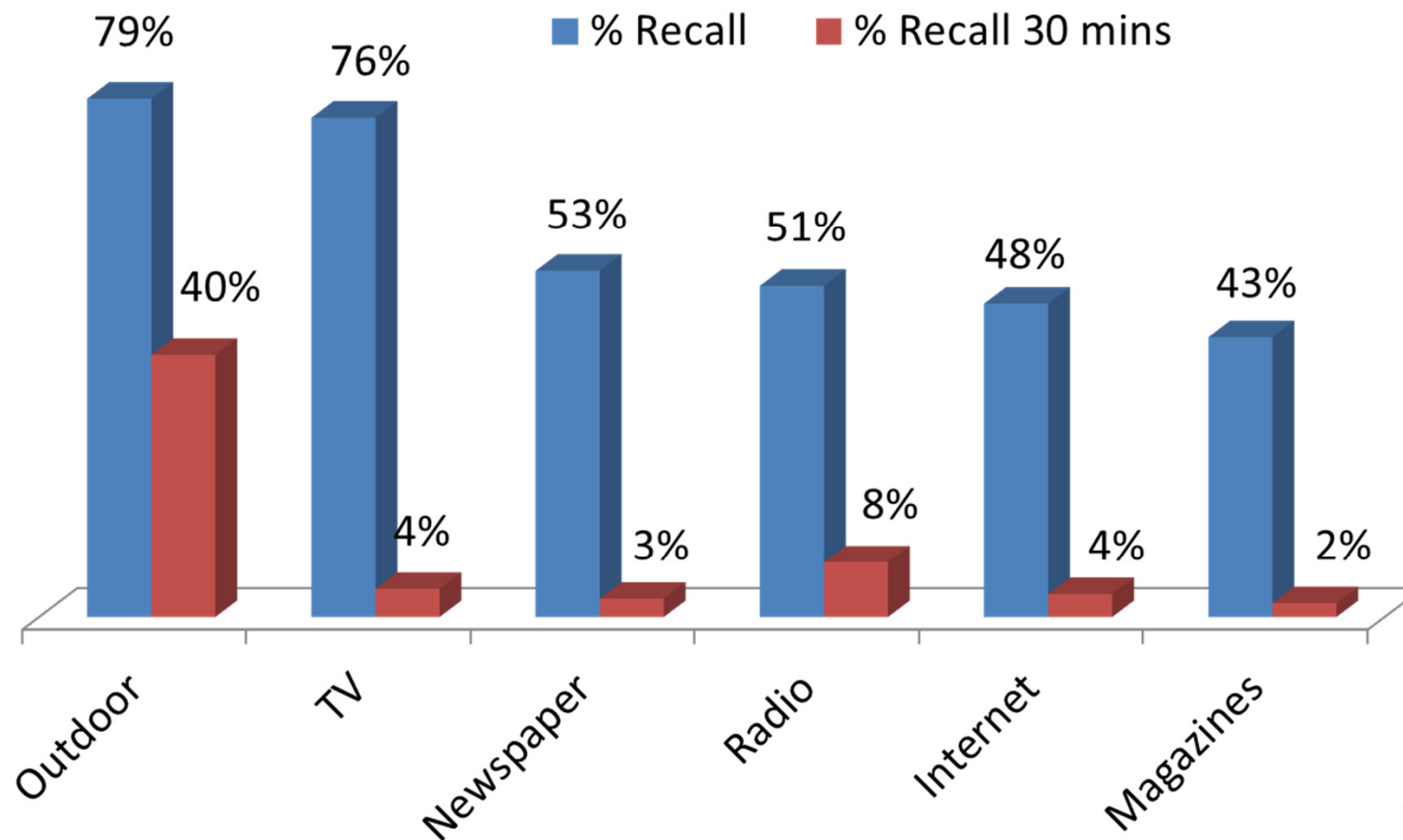
Other media showcard



- Seen / heard in last 30 minutes
- Seen / heard in last 24 hours
- Seen / heard during past week
- Seen / heard longer ago

Any Ad Recall vs 30 mins Ad Recall by Media 'The Last Window of Influence'

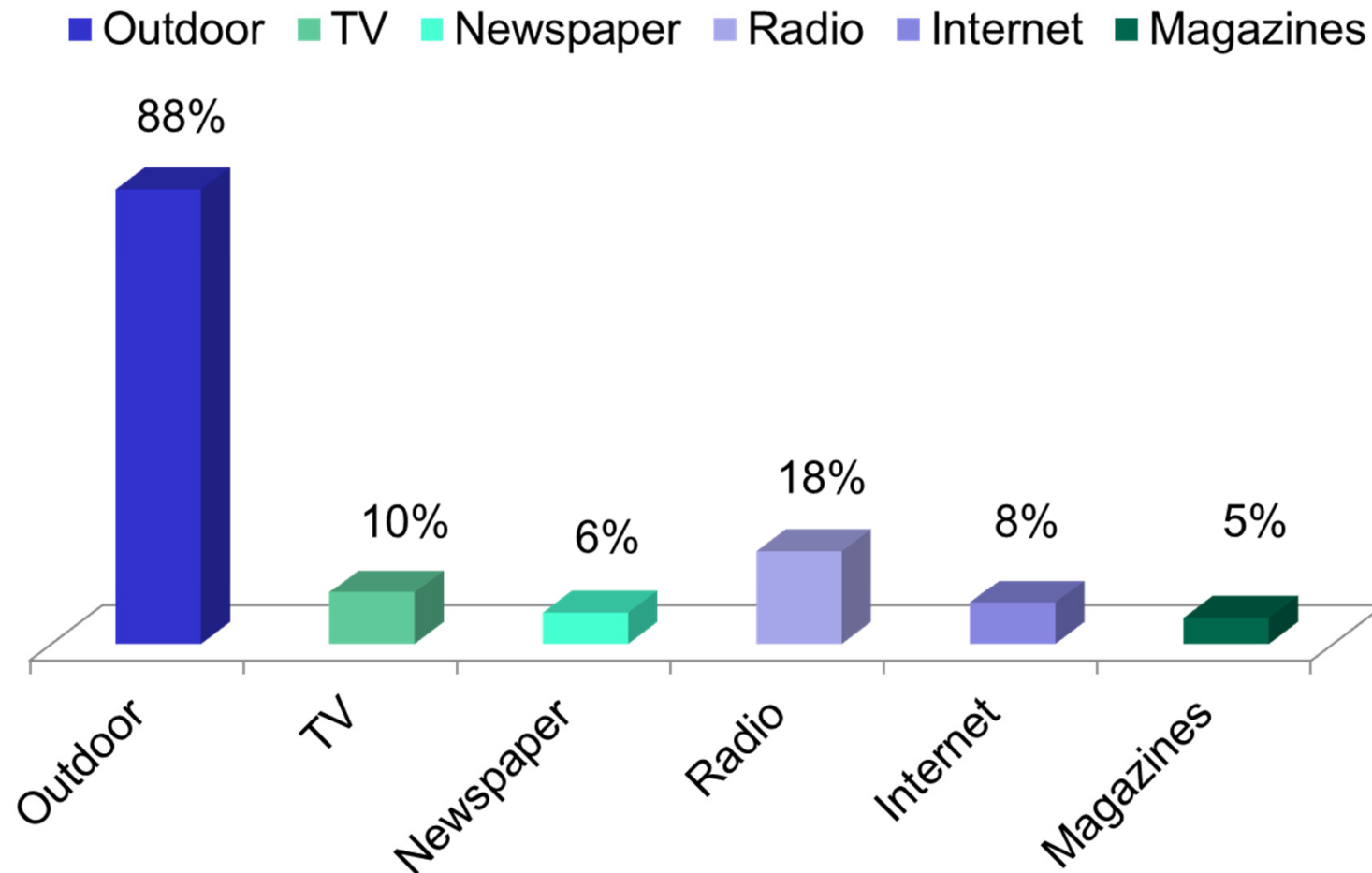
All Shoppers



Source: Helen-Harrison & Company, July 2011, 604 intercept shopper interviews, 4 UK locations

30 mins Ad Recall by Media

'The Last Window of Influence'

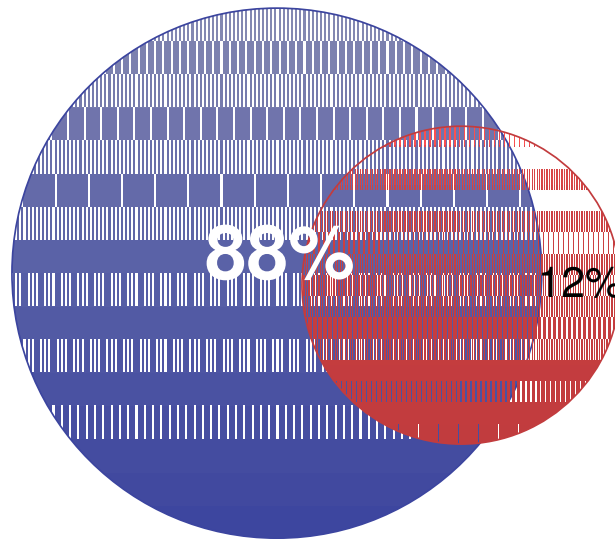


Base: All aware any advertising any media last 30 mins (274)

Shoppers' ad exposure in 30 min. preceding start of shopping (“last window of influence”)

(N=274)

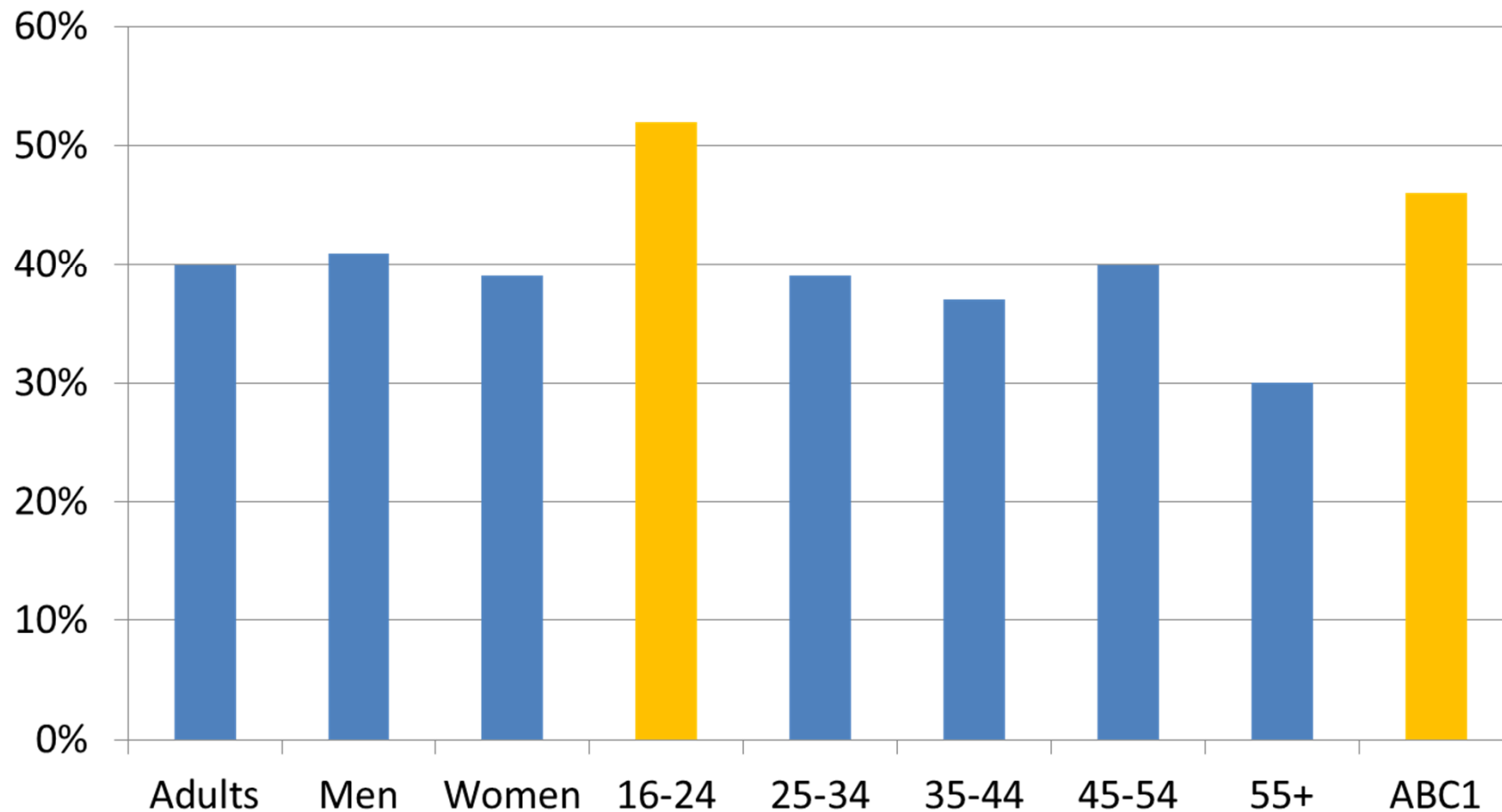
**Seen
outdoor ad
only (168)**



**Seen or
heard ad
in other
medium
only (33)**

**Seen
outdoor ad
and ad in
another
medium (73)**

Seen outdoor ad in past 30 mins



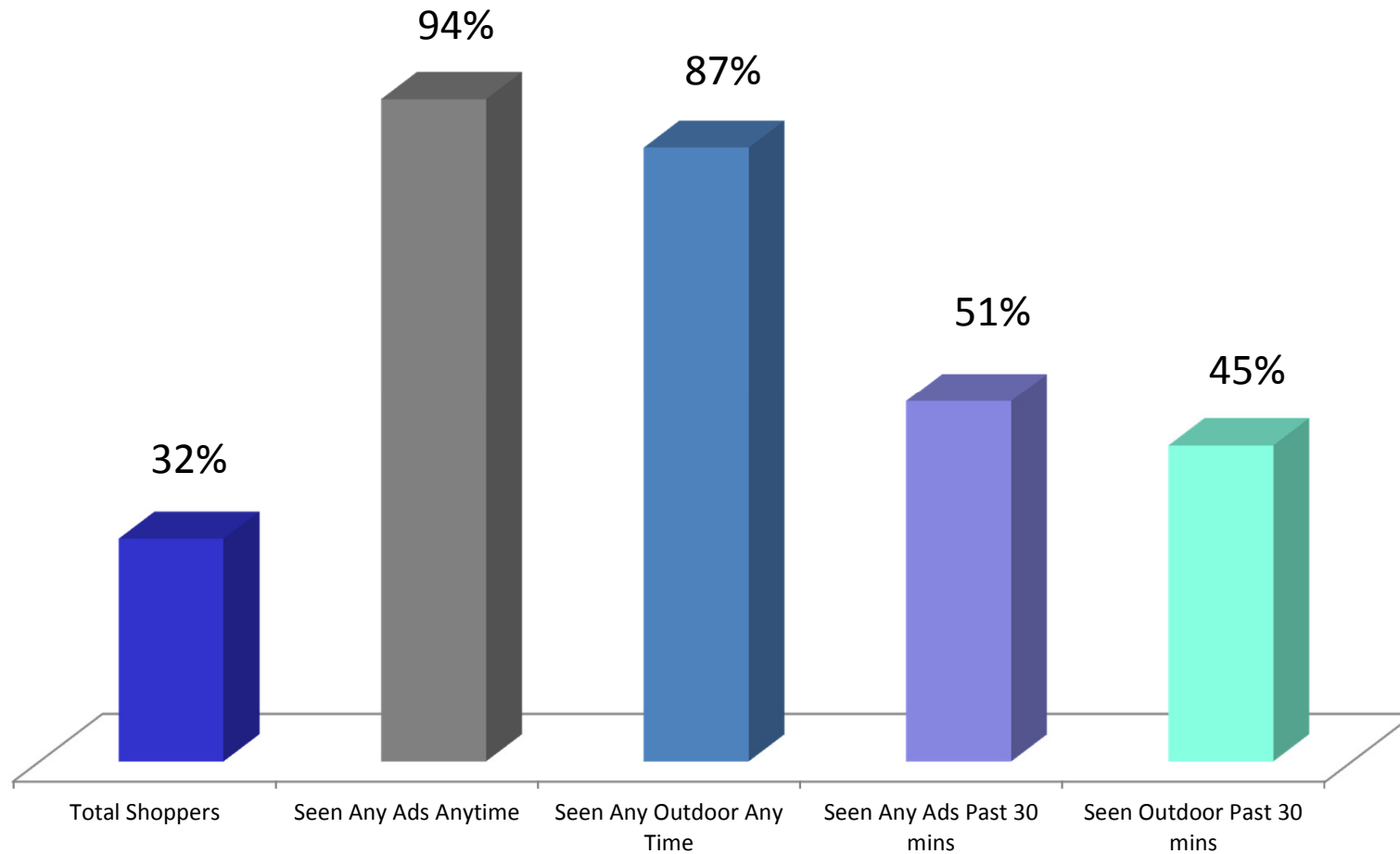
Source: Helen-Harrison & Company, July 2011, 604 intercept shopper interviews, 4 UK locations

The Outdoor Ad Aware 30 minutes Shopper - Likelihood to Visit Retailers

	INDEX vs. All Shoppers
Mobile phone / telecom stores	112
Banks / building society	111
Fast Food outlet	111
News agent / convenience store	110
Fashion/clothes shops	98
Supermarket	97
Chemist	91
Travel Agents	85

Base: Outdoor Ad Aware 30 mins (240)

Visitors to Mobile phone / telecom stores: 45% have seen outdoor ads in past 30 mins

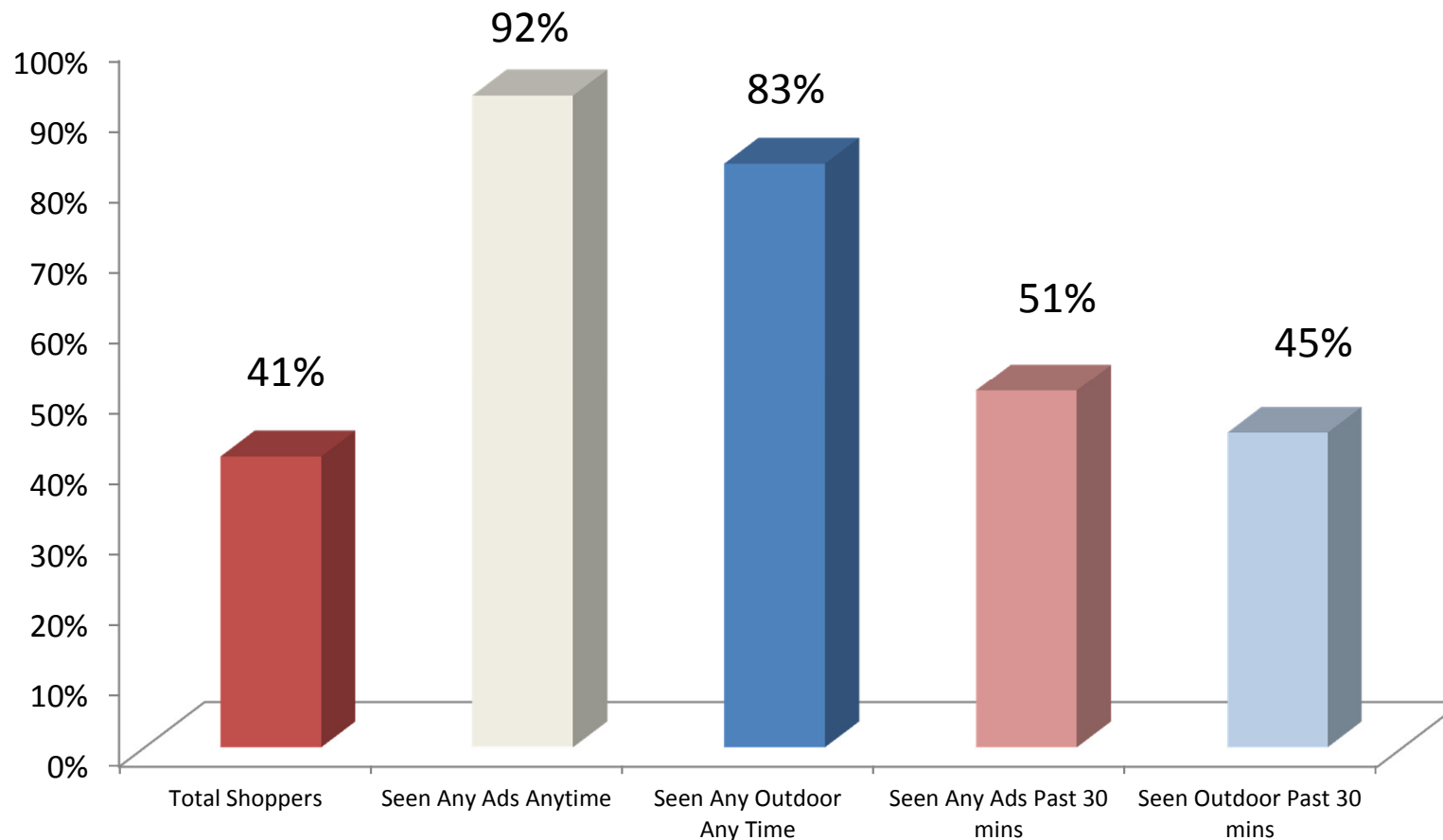


Base: All Shoppers (n=604), those intending to visit mobile phone store today (n=190)

Source: Last Window of Influence, Helen-Harrison & Company, face to face intercept interviews, 4 UK shopper locations, July 2011



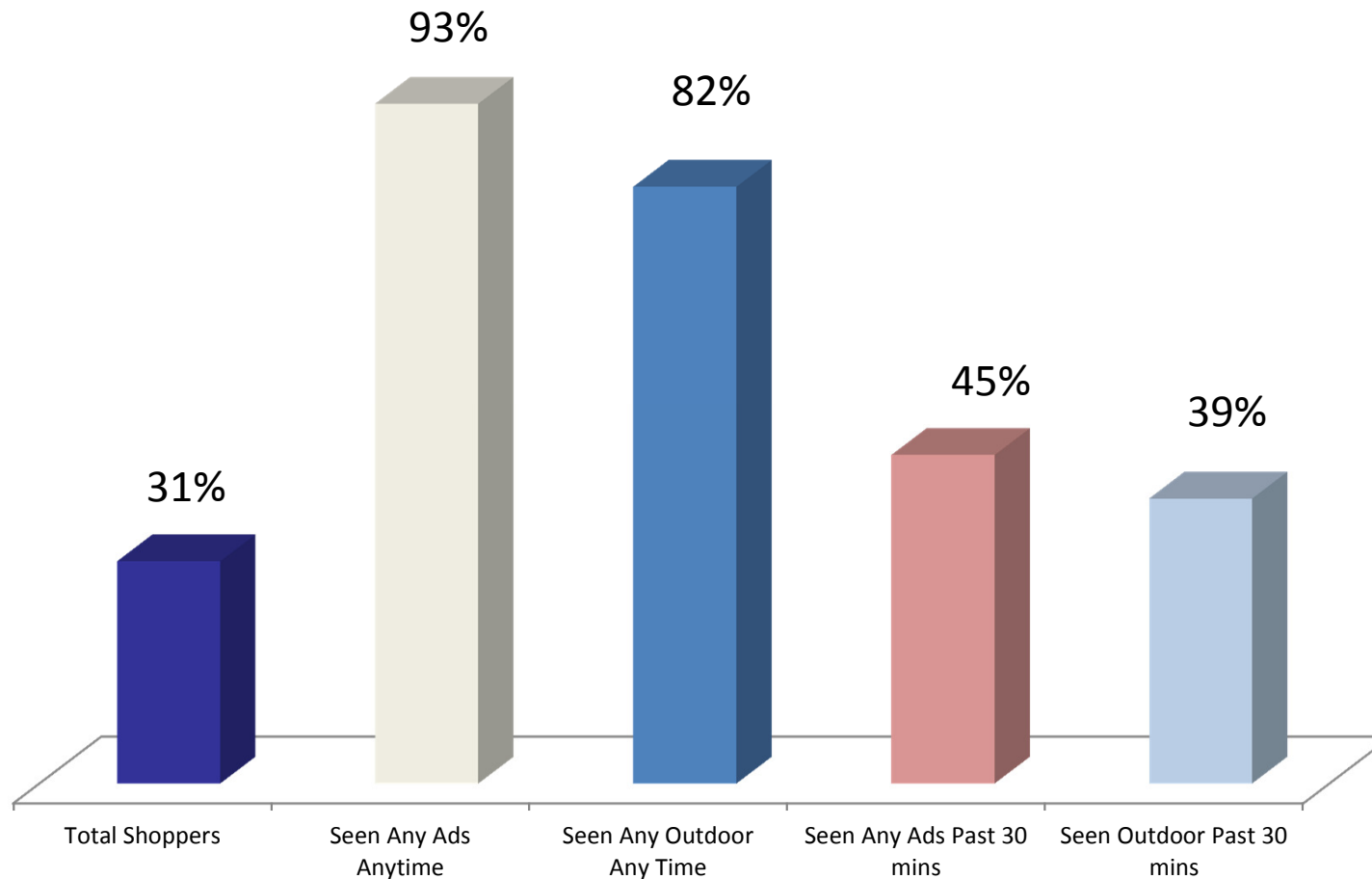
Visitors to fast food stores – 45% have seen outdoor ads in past 30 mins



Base: All Shoppers (n=604), those intending to visit fast food store today (n=249)

Source: Last Window of Influence, Helen-Harrison & Company, face to face intercept interviews, 4 UK shopper locations, July 2011

Visitors to supermarkets – 39% have seen outdoor ads in past 30 mins

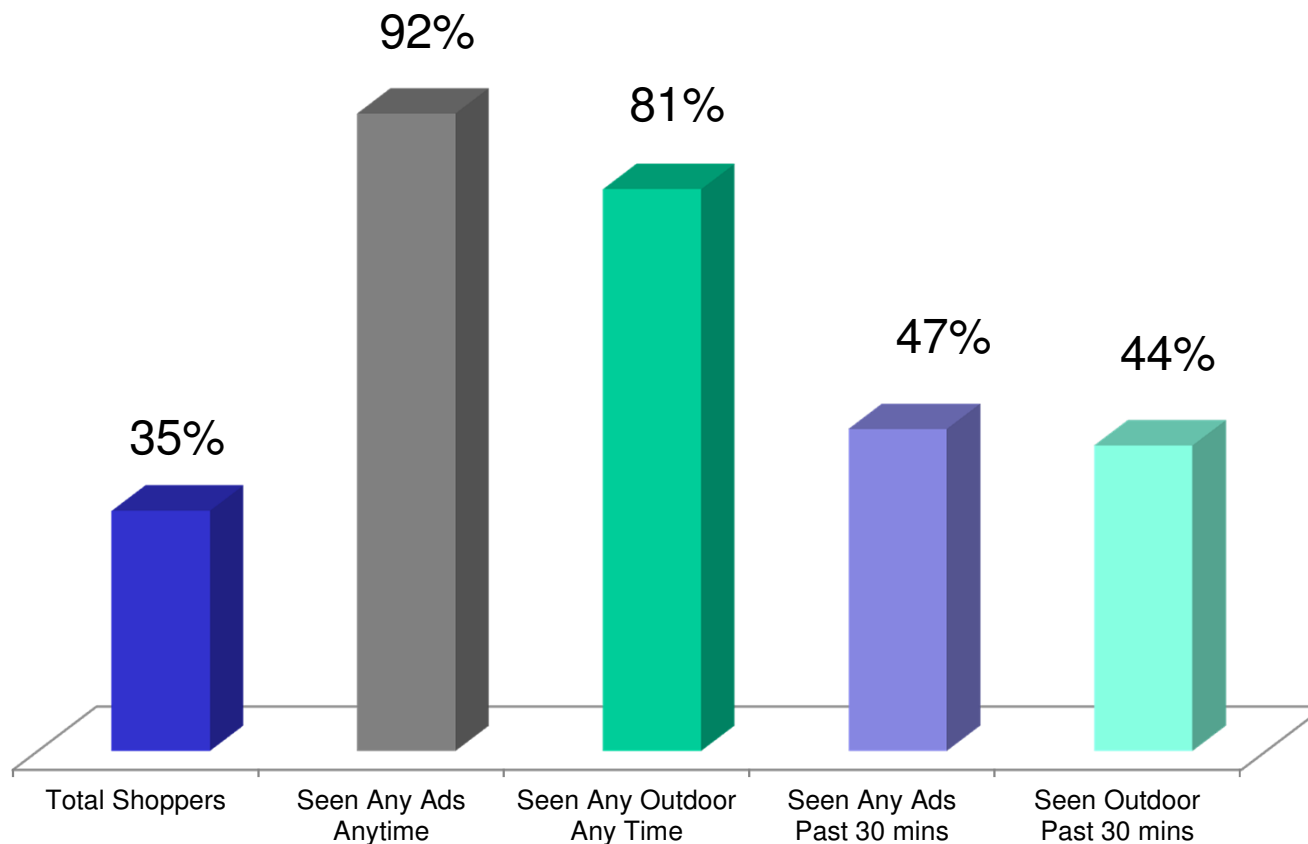


Base: All Shoppers (n=604), those intending to visit supermarket today (n=184)

Source: Last Window of Influence, Helen-Harrison & Company, face to face intercept interviews, 4 UK shopper locations, July 2011



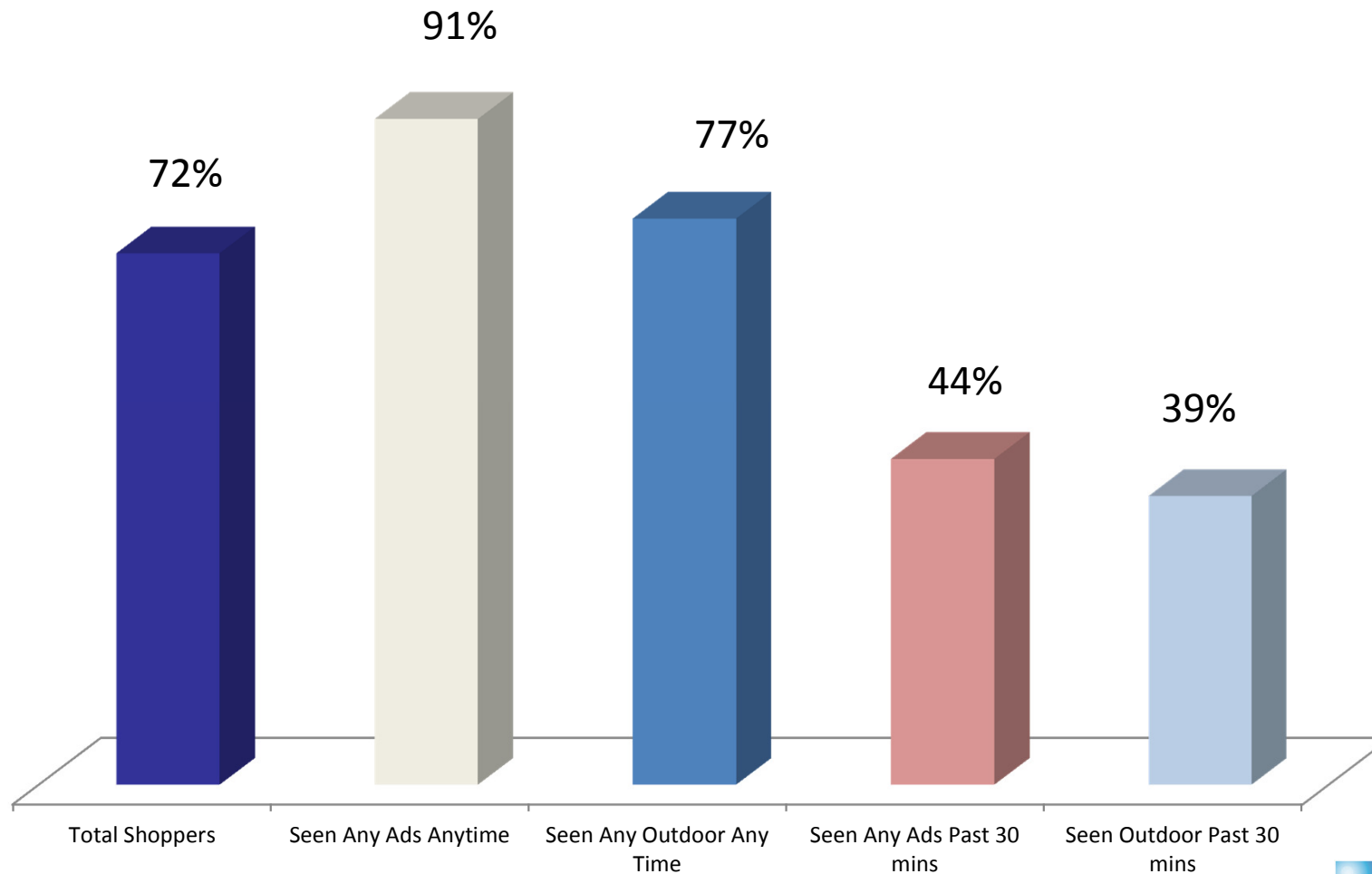
Visitors to banks / building societies: 44% have seen outdoor ads in past 30 mins



Base: All Shoppers (n=604), those intending to visit bank / building society today (n=210)

Source: Last Window of Influence, Helen-Harrison & Company, face to face intercept interviews, 4 UK shopper locations, July 2011

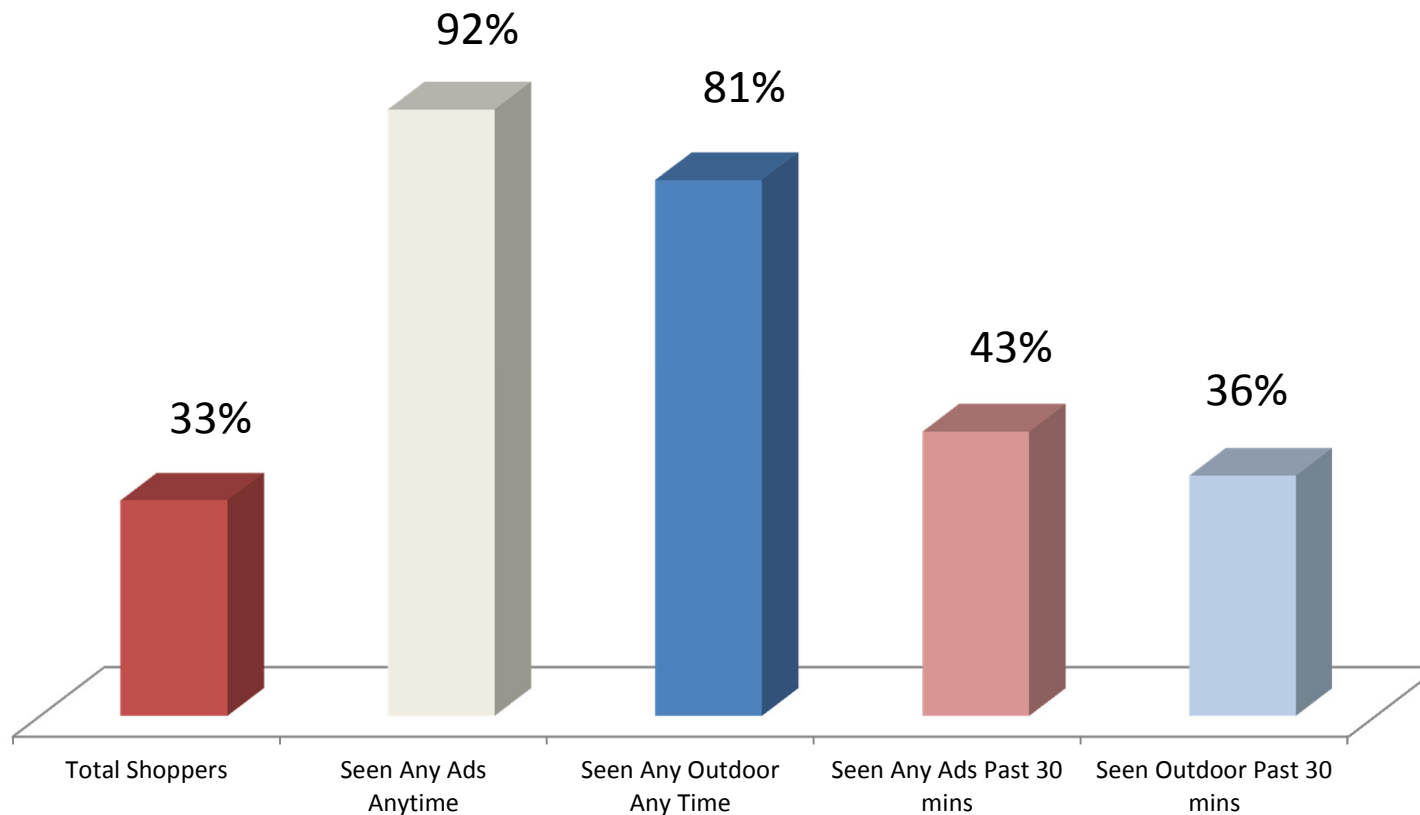
Visitors to fashion and clothes shops: 39% have seen outdoor ads in past 30 mins



Base: All Shoppers (n=604), those intending to visit fashion and clothes shop today (n=437)

Source: Last Window of Influence, Helen-Harrison & Company, face to face intercept interviews, 4 UK shopper locations, July 2011

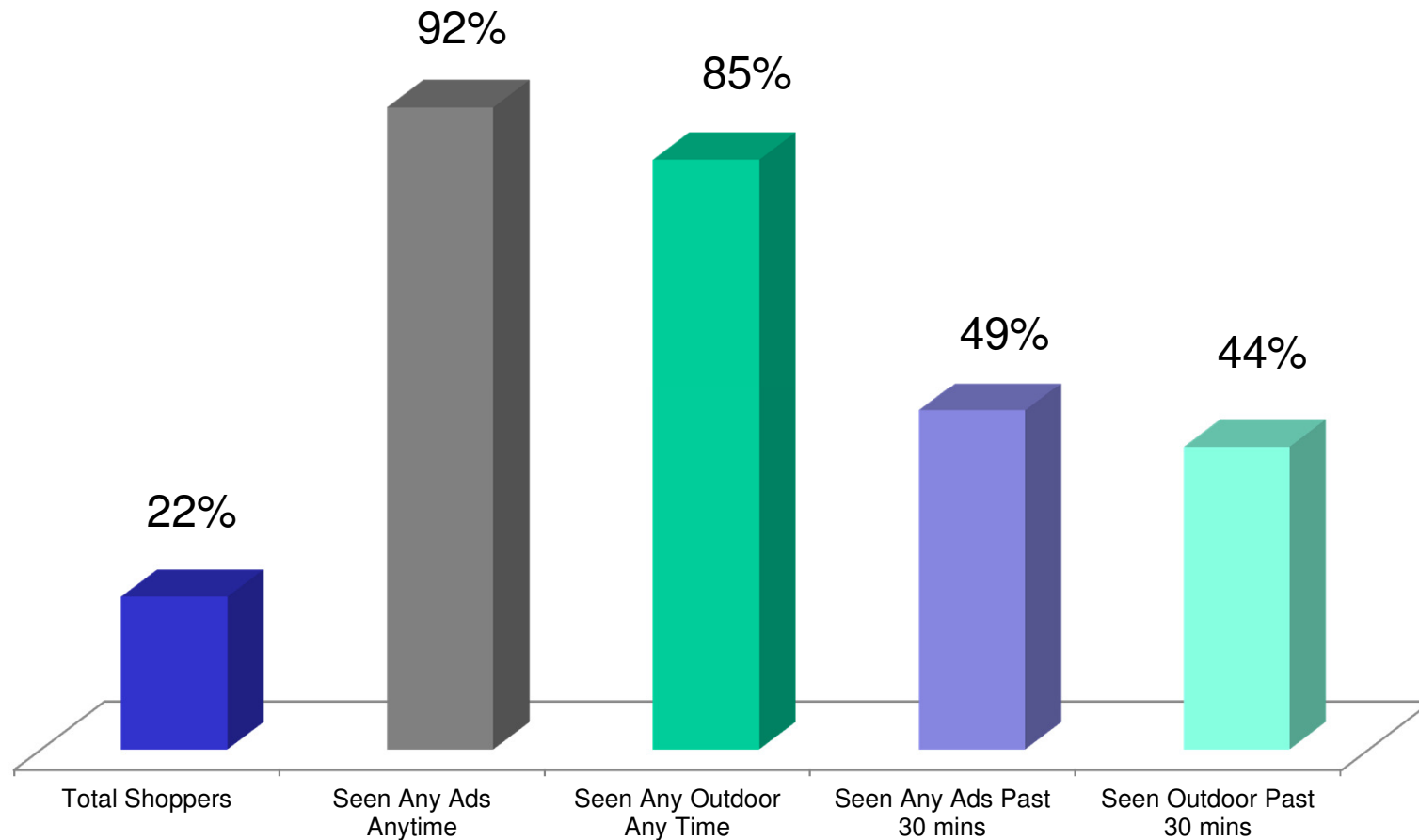
Visitors to chemists – 36% have seen outdoor ads in past 30 mins



Base: All Shoppers (n=604), those intending to visit chemist today (n=196)

Source: Last Window of Influence, Helen-Harrison & Company, face to face intercept interviews, 4 UK shopper locations, July 2011

Visitors to newsagent / convenience store: 44% have seen outdoor ads in past 30 mins

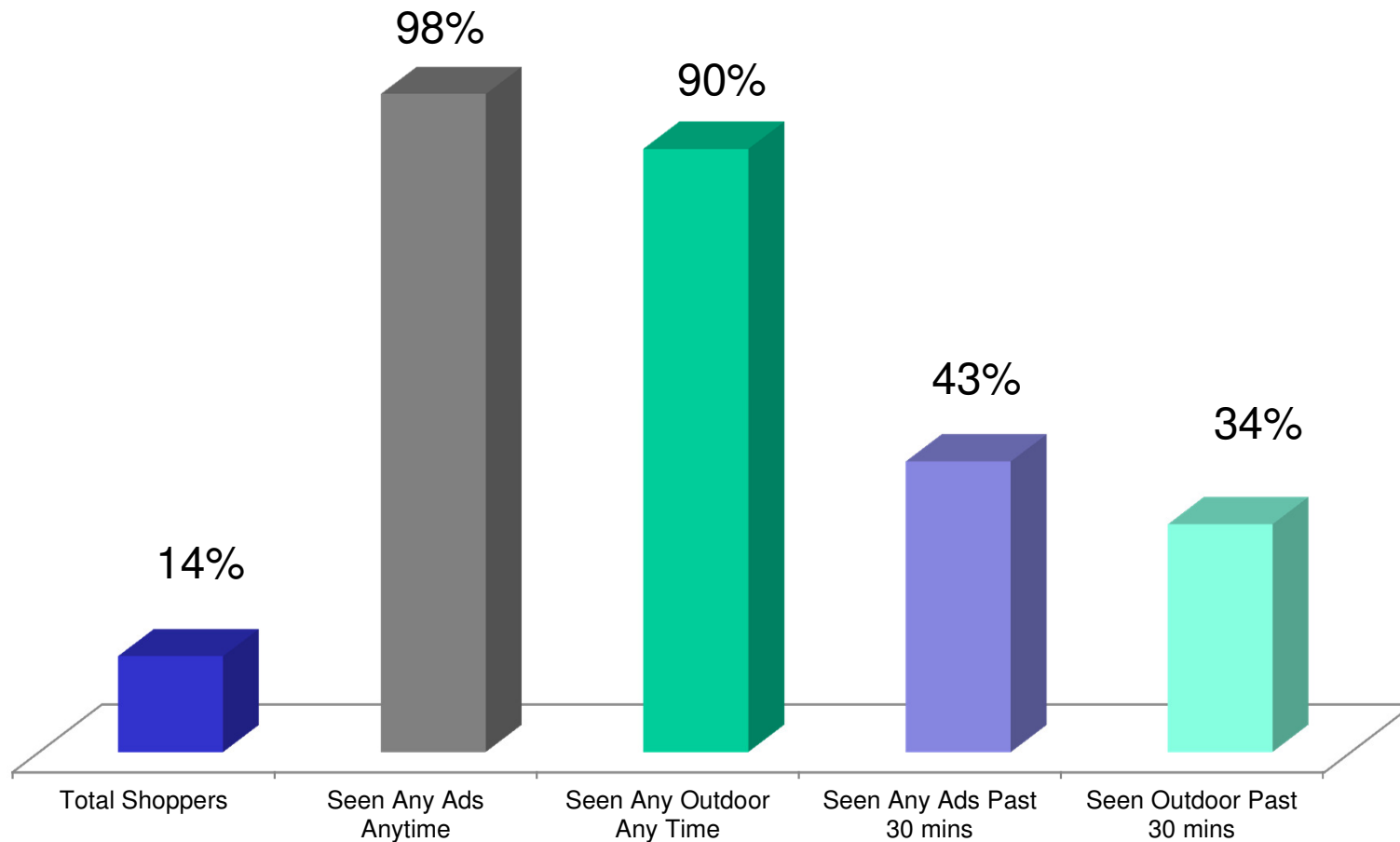


Base: All Shoppers (n=604), those intending to visit newsagent / convenience store today (n=133)

Source: Last Window of Influence, Helen-Harrison & Company, face to face intercept interviews, 4 UK shopper locations, July 2011



Visitors to travel agents: 34% have seen outdoor ads in past 30 mins

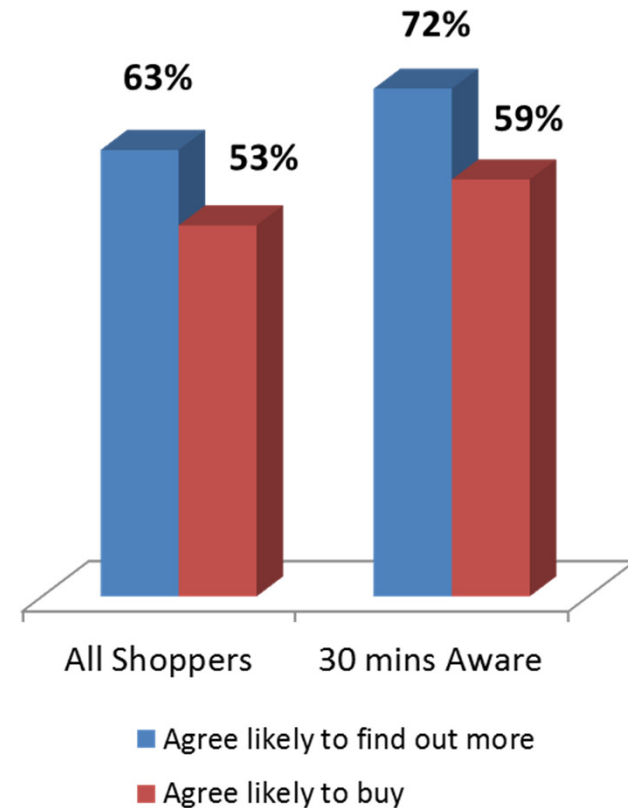


Base: All Shoppers (n=604), those intending to visit travel agent store today (n=86)

Source: Last Window of Influence, Helen-Harrison & Company, face to face intercept interviews, 4 UK shopper locations, July 2011

Impact of Outdoor – Likelihood to buy increases if outdoor seen in past 30 mins

	All Shoppers (604)	Outdoor Ad Aware (241)	INDEX
Poster might make you more likely to consider finding out more about the product/brand	63%	72%	114
Poster might make you more likely to buy the product/brand	53%	59%	112



Source: Helen-Harrison & Company, July 2011, 604 intercept shopper interviews, 4 UK locations

Retail Visitors – Outdoor in last window of Influence has potential to be highly effective

Destination store shoppers are going to shop at today	% who are more likely to find out more about a brand if they see a poster	% who are more likely to buy a brand if they see a poster
Chemist	81%	56%
Newsagent / convenience store	75%	55%
Mobile phone / telecom stores	74%	71%
Fashion/clothes shops	69%	62%
Fast Food outlet	69%	51%
Supermarket	68%	60%
Banks / building society	67%	65%

Source: Helen-Harrison & Company, July 2011, 604 intercept shopper interviews, 4 UK locations

Attitudes to Shopping: only 13% not susceptible to last window of influence

	All Shoppers (604)	16-44 (366)	Men (294)	Women (310)
I usually plan in advance everything I want to buy and only buy things on my list	13%	9%	17%	8%
I sometimes make unplanned purchases but mostly stick to my shopping list	29%	26%	28%	30%
I often buy something that's not on my shopping list	18%	21%	16%	20%
I usually don't make a shopping list or plan, and just buy spontaneously	39%	43%	37%	41%

Source: Helen-Harrison & Company, July 2011, 604 intercept shopper interviews, 4 UK locations

Summary – Outdoor Key Points

- Outdoor is the key medium to reach shoppers in the 30 mins prior to purchase. 40% of shoppers see outdoor in the last window of influence. Next highest is radio with 8%
- Outdoor dominates ad exposure in last 30 minutes, reaching 88% of those exposed to any ad
- Only 13% of adults (8% of women and 9% of 16-44's) are not susceptible to last minute influence
- Awareness of outdoor advertising during this pre purchase period increases the likelihood to find out more about a product and to buy a product