

Case Study 3: In-Store Communications



The client issue

The client – a fast food restaurant – wanted to understand the **impact of their in-outlet communication** and gain the **maximum ROI**.

The client was spending a large amount of money on in-outlet communication, but was unaware of which elements were impactful and which were not. The client wanted to:

- understand what shoppers looked at whilst ordering a meal in their restaurants
- what the impact and effectiveness was of their POS material and menu board.

The TNS approach

TNS employed a 2-part approach. First shopper behaviour within a restaurant was observed using **discrete cameras**, and a sample of shoppers were **interviewed** upon leaving the restaurant. Second, a sample of shoppers was recruited to visit the restaurant using an **Eye Mark recorder**.

The filming enabled a detailed understanding of shopper behaviour in the restaurant to be formed, and the interviews provided understanding of **what shoppers noticed and remembered**. The Eye Mark visits were then used to identify exactly **what shoppers looked at** and focused upon in the restaurant.

The combination approach uncovered that – upon leaving the restaurant – **shoppers were unaware of many POS items**. Some of these items had **no cut through** due to their siting (e.g. not seen as hanging from ceiling), whereas others that were “seen” **did not register** with the shoppers (e.g. relevance of message).

The outcome

TNS conclusions and recommendations

- Several POS items within the fast food restaurants were found to have no impact or cut through with shoppers
- Shoppers mainly noticed the staff, the till and the fridges, rather than POS items
- POS items were often looked at but not visually processed
- Having identified the impact of the various POS items, TNS could recommend where to focus budget to best effect.

Next steps

The client **re-targeted their POS mix** to maximise spend on the elements that were most effective, and implemented the changes across Europe.

As a result, **promotional sales increased by +21%** whilst **spend on POS was reduced by 19%**.

For more information please contact:

Barry Lemmon Global Head Retail & Shopper barry.lemmon@tns-global.com