

IF WE ARE NOT PREPARED TO *CHANGE* OUR  
*BEHAVIOURS*,  
HOW CAN WE EXPECT OUR SHOPPERS TO?

# PROGRAMME OVERVIEW



**7,470**

Face to Face Interviews



**20,000+**

Shopper Observations



**9 Retailers**

Covering both Major and Independent operations



National coverage in

**6 states**

NSW, Vic, Qld, SA, WA & Tas  
with Metro and Regional representation



**Fuel & Non Fuel sites**

Conducted March-April 2018



# FUEL IMPACTS BEHAVIOUR



Fuel Only  
**54%**

# FOOT TRAFFIC



65%



35%

# MISSION

## REASON FOR COMING TO THE STORE



Beverage

**44%**



Fuel

**23%**



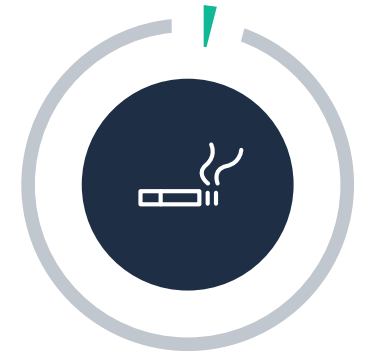
Meal

**10%**



Snack

**6%**



Tobacco

**4%**

# SHOPPER PROFILE 2018

Gender Split



Age Profile



**\$9.30**

Spend



**2.7**

Weekly Visit frequency

# PROMOTION V IMPULSE SHOPPER

PROMOTIONAL  
PENETRATION:

**19%**

IMPULSE  
PURCHASES:

**8%**



**\$9.60**



**\$13.20**



**2.7 items**



**3.3 items**

# FUEL SHOPPER BEHAVIOUR

PROMOTIONS: **20%**



\$9



2.6 items

IMPULSE: **15%**



\$9.10



2.5 items



# PROMOTION DISSATISFACTION

PROMOTIONAL  
PENETRATION: **19%**



NPS 56

NOT PROMOTIONAL  
PENETRATION: **81%**



NPS -18

# MALE V FEMALE SHOPPER VALUE



**\$9.27**

**2.8x**

Weekly Value

**\$25.96**

**\$9.38**

**2.3x**

Weekly Value

**\$21.57**



# YOUNG FEMALES



**\$8.00**

**2.1x**

Weekly Value

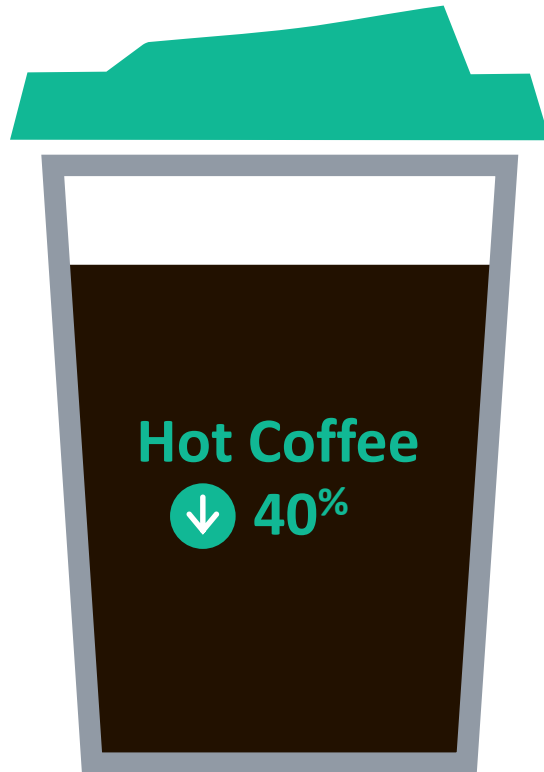
**\$16.80**

# WHAT ARE THE OPPORTUNITIES



# HOT COFFEE DRIVES BEVERAGES

60% - 70%  
Beverages

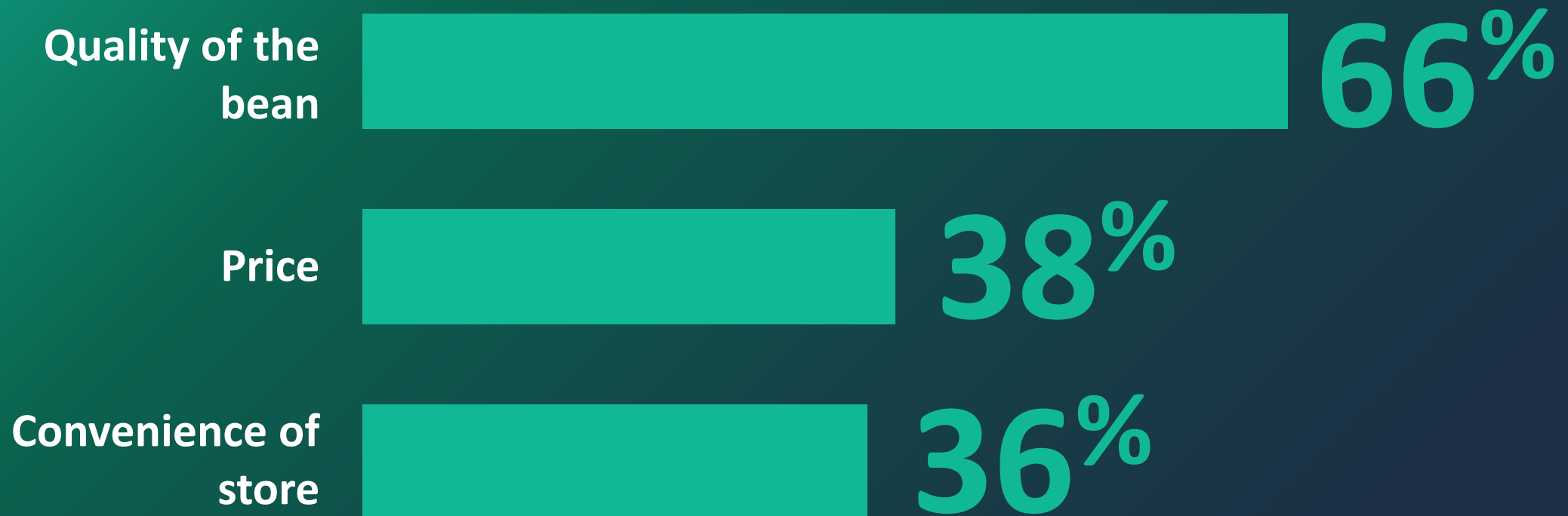


70% - 85%  
Beverages

# HOT COFFEE OPPORTUNITY



# HOT COFFEE PURCHASE DRIVERS



# FOOD ON THE GO PENETRATION 22%



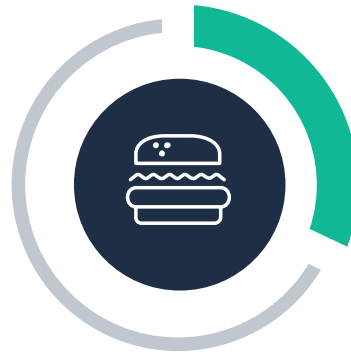
Pies

**13%**



Sausage Rolls

**13%**



Other Hot Food

**32%**



Bakery Snacks

**22%**



Sandwiches

**24%**



# SNACKING PENETRATION 17%



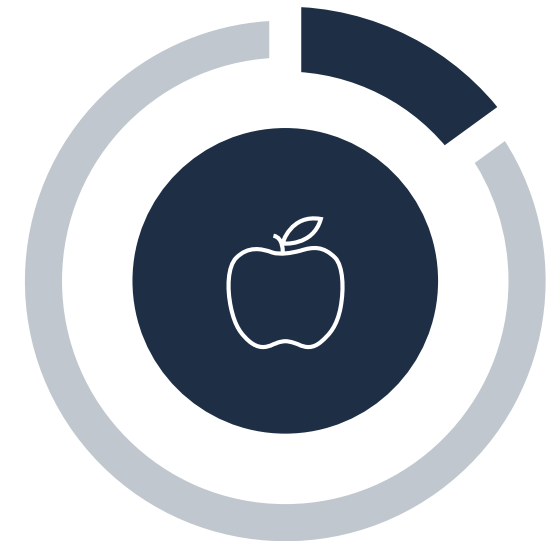
Chocolate Bars

**24%**



Chips

**22%**



**19%**

