Kirsi Laine

The Factors Influencing the Choice of Grocery Store among Finnish Consumers

Metropolia University of Applied Sciences

Master of Arts

Media Production

Thesis

12 May 2014

Author Title Number of Pages Date	Kirsi Laine The Factors Influencing the Choice of Grocery Store among Finnish Consumers 46 pages and 2 appendices 12 May 2014
Degree	Master of Arts
Degree Programme	Media Production
Specialisation option	Media Economy
Supervisor	Gwenaëlle Beauvois, Ph.D., Lecturer

This thesis discusses the factors influencing the Finnish consumers' choice of grocery store as well as impulse buying. The main research objective is to define the effects of bought, owned and earned media on the grocery store choice. The three sub-objectives are: 1) grocery shopping frequency among Finnish consumers, 2) the shopping companion at a grocery store and the decision-maker concerning the store, and 3) the usage of shopping lists and impulse buying in grocery stores. The 4P model of marketing (product, price, place and promotion) describes primarily the competitive factors when marketing physical goods. In addition to the 4P model, the theoretical framework of this thesis consists of the bought, owned and earned media. Loyalty programs, store features, in-store advertising, impulse buying and shopping lists are also discussed as factors affecting grocery shopping in this thesis. The data for the quantitative survey was collected through an online panel by Norstat Oy, and the survey was answered by 1033 Finnish consumers who are at least somewhat responsible for the grocery shopping in their households.

The data of this thesis reveals for example that most people do grocery shopping 2–3 times a week. The preference of the S chain grocery stores is very high among Finns. The most considered grocery stores are S-market, Prisma, Lidl and K-Citymarket. Women are responsible for the grocery store selection more typically than men. A shopping list is used by approximately half of the Finns. However, despite the list, impulse buying occurs, as two thirds of the list users buy also something else. A new product trial is impacted by point-of-sale activities and word-of-mouth. The most often visited grocery store among Finns is chosen most typically based on store's product selection, the previous experience, and the location. However, when a different grocery store is visited, the role of the media in leading consumers to the store becomes significant. Discounts in general, direct marketing and newspaper advertising entice consumers into a new store. When talking about groceries in general, Finnish consumers still tend to search for discounts. Based on the data, however, the effect of the traditional bought media on the choice of a different grocery store decreases the younger the consumer is. The innovative mobile marketing solutions may make it possible to target consumers with relevant content at the right place and time. Interactivity in the form of for example competitions may help in reaching especially younger consumers.

Keywords	purchase decision, grocery store, media, 4P, impulse buying

Tekijä Otsikko Sivumäärä Päivämäärä	Kirsi Laine Elintarvikekaupan valintaan vaikuttavat tekijät suomalaisessa päivittäistavarakaupassa 46 sivua ja 2 liitettä 12.5.2014
Tutkinto	Medianomi, YAMK
Koulutusohjelma	Mediatuottamisen koulutusohjelma
Suuntautumisvaihtoehto	Mediatalous
Ohjaaja	Gwenaëlle Beauvois, YTT, Lehtori

Opinnäytetyö kuvaa suomalaisten kuluttajien ruokakaupan valintaan sekä spontaaniin ostamiseen vaikuttavia tekijöitä. Ostetun, oman ja ansaitun median merkitys ruokakaupan valinnalle on tärkein tutkimusongelma, ja se jakautuu kolmeen alaongelmaan: 1) ruokakaupassa käynnin säännöllisyys suomalaisten kuluttajien keskuudessa, 2) ostosseura ruokakaupassa ja kuka päättää ruokakaupasta sekä 3) ostoslistojen käyttö ruokakaupassa ja elintarvikkeiden spontaani ostaminen. Markkinoinnin klassinen 4P-malli (product=tuote, price=hinta, place=jakelu sekä promotion=myynninedistäminen) kuvaa ensisijaisesti fyysisten tuotteiden markkinoinnin kilpailukeinoja. 4P-mallin lisäksi oma, ostettu ja ansaittu media muodostavat tärkeimmän osan teoreettisesta viitekehyksestä. Lisäksi opinnäytetyössä kuvataan kanta-asiakasohjelmien, kaupan ominaisuuksien ja mainonnan, spontaanin ostamisen sekä ostoslistojen vaikutusta elintarvikkeiden hankintaan. Kvantitatiivisen tutkimuksen tiedonkeruu on toteutettu Norstat Oy:n verkkopaneelissa, ja kyselyyn vastasi 1033 elintarvikkeiden ostamisesta kotitaloutensa osalta ainakin jossain määrin vastuussa olevaa suomalaista kuluttajaa.

Tutkimuksessa kävi muun muassa ilmi, että suomalaiset käyvät ruokakaupassa yleisimmin 2–3 kertaa viikossa. S-ketjun kaupat ovat suomalaisten mielissä etusijoilla heidän valitessaan ruokakauppaa. S-market, Prisma, Lidl ja K-Citymarket ovat harkituimpia ruokakauppoja. Naiset päättävät ruokakaupasta miehiä yleisemmin. Lähes puolet suomalaisista käyttää ostoslistaa, mutta listasta huolimatta kuluttajat tekevät myös spontaaneja ostoksia: jopa kaksi kolmesta ostoslistan käyttäjästä ostaa myös tuotteita ostoslistan ulkopuolelta. Kaupassa toteutettavat aktiviteetit ja word-of-mouth houkuttelevat kokeilemaan uusia tuotteita. Kaupan valikoima, hyvät kokemukset sekä sijainti vaikuttavat useimmin vieraillun kaupan valintaan, kun taas median rooli korostuu uutta tai eri kauppaa valittaessa. Alennukset ylipäätään, suoramarkkinointi sekä sanomalehtimainonta houkuttelevat suomalaisia kuluttajia. Elintarvikkeita ostettaessa juostaan usein edelleen tarjousten perässä. Tutkimuksen perusteella perinteisen ostetun mainonnan merkitys tavallisesta poikkeavan kaupan valinnalle vähenee sitä mukaa, mitä nuoremmasta kuluttajasta on kyse. Mobiilit mainosratkaisut voivat mullistaa myös elintarvikemainonnan, kun kuluttajille voidaan kohdentaa viestintää entistä monipuolisemmin. Erityisesti nuorempia kuluttajia voidaan tavoittaa mobiilisti esimerkiksi interaktiivisilla kilpailuilla.

Avainsanat	ostopäätös, ruokakauppa, media, 4P, spontaani ostaminen

Table of contents

Table of figures

Table of tables

1 Introduction

This thesis concentrates on the factors affecting Finnish consumers' choice of grocery store. Both the reasons for choosing the mainly visited grocery store as well as the factors leading consumers to a different store are discussed. In addition to the roles of bought, owned and earned media (see definition on chapter 2.2.) on the choice of grocery store, several other motives for the choice are presented. This theme is of interest due to the author's work experience in a media agency and with market research. When the consumers are confronted with more and more information as well as advertising in many forms in their hectic lives, let alone the number of brands competing of the awareness and the preference in their minds, the decision-making process is more and more affected by a number of different factors. Grocery shopping is a very interesting theme from this point of view, and this is discussed next.

1.1 Background of the study

Shopping is often seen as a recreational activity, and sometimes also as a means of escaping from the daily life rather than a transactional activity which only fulfils material needs. It often happens that consumers browse around the shops for hours just for the fun of it. Even stressful life or a bad day may be turned into a positive experience with for example a new pair of shoes. (Cinjarevic, Tatic and Petric 2011, 3.) However, grocery shopping is different from this. Groceries are bought usually 2–3 times a week and sometimes even daily. Typically when a consumer enters a supermarket after work and buys groceries, he or she does not want to spend hours pondering what to choose and from where.

Constant access to a wide range of alternatives, instant information, comparison, product reviews, search engines and trends has led to greater demands on both retailers and brands, not only online but also in-store (Gray 2013, 1–2). The use of promotions in retailing has increased rapidly in recent times. Despite the growth, especially in the fast-moving consumer goods sector, consideration of the impact and effectiveness of the promotion among academics has been limited. (Felgate, Fearne, DiFalco and Martinex 2012, 222.) This thesis provides the reader with insights of, for example, the impact of different promotions on the choice of the store.

Choices between different grocery retailing channels on the Finnish market have been discussed recently by e.g. Koistinen and Järvinen (2009). They investigated for instance how different retail channels compete with or complete each other from the consumers' points of views. It was found out that the chains with a limited range of groceries such as Lidl compete with a lower price level. However, if the key criterion is the high quality of the products, the Finnish consumers tend to prefer hypermarkets and supermarkets. When the wide selection is the key factor for consumers, they usually also choose bigger markets. Service being the main factor, supermarkets compete with close, neighbourhood stores and convenience stores. In addition, if consumers tend to prefer the time available for shopping, close neighbourhood stores tend to compete with supermarkets. The attitudes towards the location were versatile: the shops should be either close to home or at a distance with free parking possibilities. The loyalty of Finnish grocery store shoppers was clearly identified in the study, and also that of using the loyalty cards. (Koistinen and Järvinen 2009, 260; 265; 267.) Next sub-chapter represents the research objectives of this thesis.

1.2 Research objectives

As stated, this thesis concentrates on the motives based on which Finnish consumers choose grocery stores. The thesis thus provides the reader as well as grocery store chains, media and marketing agencies with useful insights on how Finnish consumers in the end select the grocery store, either the preferred one or other than the usually visited. In addition, the preferred and considered grocery stores, the shopping companion, the size of the shopping basket, the time for visiting the store, and the usage of shopping lists are also described in the empiric part of the thesis.

The main research objective of this thesis is to define the effects of bought, owned and earned media on the grocery store choice (preferred and a different store). The research objective is divided into three sub-objectives (see Figure 1): the first sub-objective of this thesis is to describe grocery shopping frequency, in addition to other relevant background information related to Finnish consumer behaviour. The second sub-objective is to discuss the shopping companion and the decision-maker when choosing the grocery store. The third sub-objective is to analyse the usage of shopping lists and impulse buying.

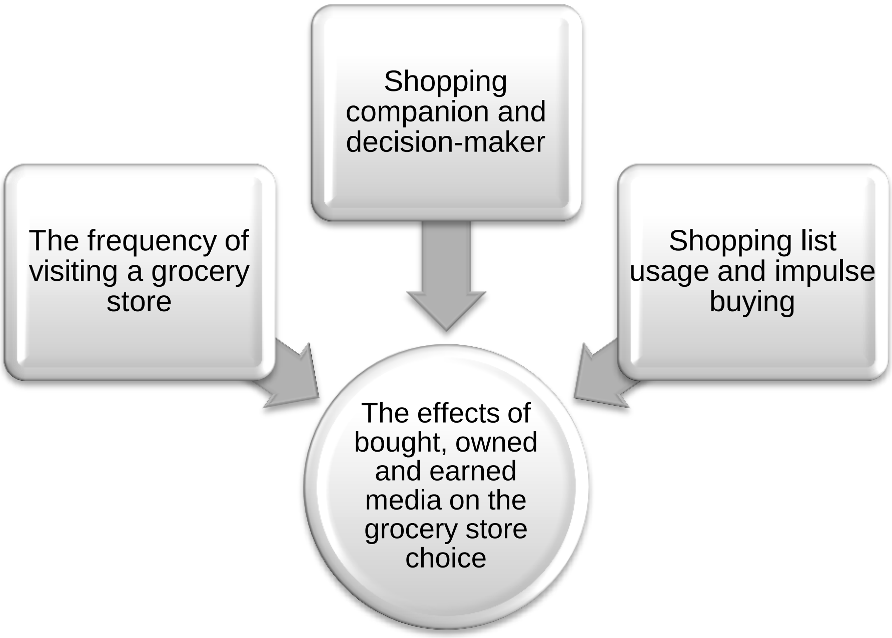

Figure 1. The research framework

Next, the key concepts of this thesis are presented and discussed. Examples and analysis of the work that researchers have done preceding this thesis are also emphasized.

2 The 4P model of marketing and BOE media

This chapter focuses first on describing the 4P model of marketing and thereafter the media division into BOE (bought, owned and earned).

2.1 Background discussion on the 4P model of marketing

The ground theory underlying this thesis is that of 4P model that has been made knowledgeable by Philip Kotler (see Figure 2). The 4Ps are described as Product, Price, Place and Promotion.

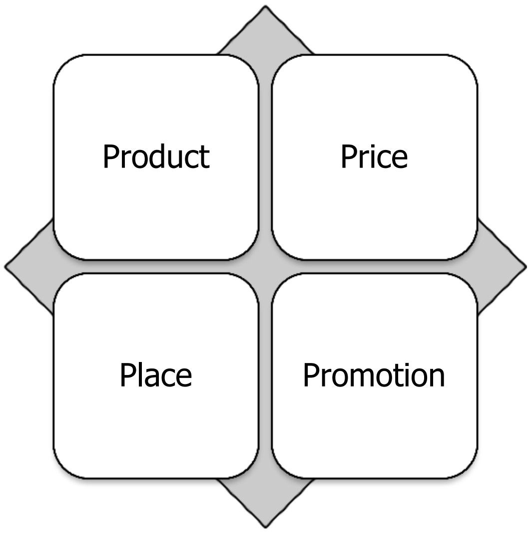

Figure 2 The 4P model of marketing

As the 4P model presented in Figure 2 has been evaluated and its suitability to various product categories has been discussed, even a 7P's model has been presented. The three additional P's are People, Process and Physical evidence. Muzondo and Mutandwa assessed in their article the significance of the 7P's of marketing and their impact on the consumer choice of a main grocery store in a hyperinflatory economy. They stated that various academic and commercial studies show that the 7 P's of marketing are crucial in determining the choice of a store although consumer behaviour models do not reflect that in terms of marketing stimuli element. While grocery market contains tangible product marketing, it also has a remarkable portion of service aspects. Customers buy products from retailers who then again have employees who interact with customers in the shopping and buying process. Process in the 7P's model means the methods that are used to produce, and deliver, and consume a service. Physical evidence includes the tangible aspects of the organization, and is thus important especially in creating a favourable impression for instance for banks and retail stores. (Muzondo and Mutandwa 2011, 4; 7–8.)

Ettenson et al. presented an idea of focusing on a solution instead of a product, on access instead of a place, on value instead of a price, and on education instead of promotion (Ettenson, Conrado and Knowles 2013, 26). Robert F. Lauterborn claims that the 4Ps should be seen more from a consumer's perspective, and he re-named the model into 4C's. He transformed the product into customer solution (concentrating on consumer wants and needs), the price into cost to the customer (total cost to satisfy a want or a need), the place into convenience (how to guarantee convenience to buy), and the promotion into communication (creating a dialogue with the potential customers based on their needs and lifestyles). (Goi 2009, 3.) Next, the traditional 4Ps of marketing are shortly described.

2.2 Defining product, price, place and promotion

Product is anything that is offered to a market for attention, acquisition, use or consumption that might satisfy a want or a need. It is more than just tangible goods. When described broadly, the term product includes physical objects, service persons, places, organizations, ideas or combinations of these entities. Product is the key in the overall marketing offering. Marketing mix planning starts with formulating an offering that brings value to the target group. (Kotler, Armstrong, Wong and Saunders 2008, 500.) The levels of the product are described in the following Figure 3.

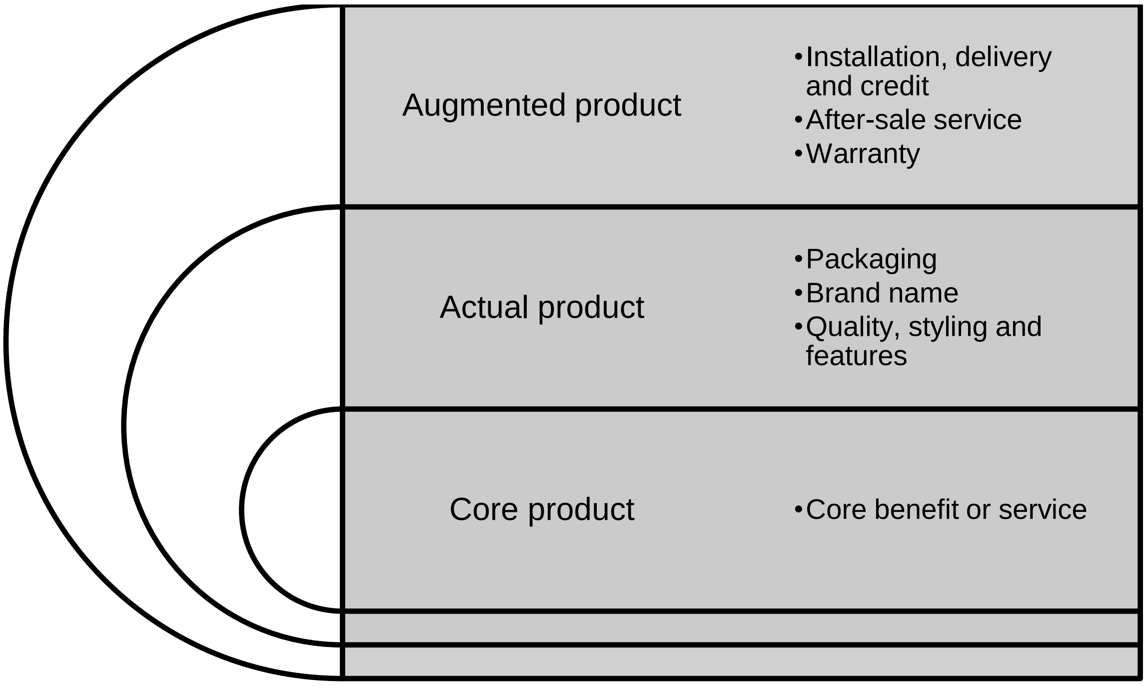

Figure 3 The levels of a product

When the product is emphasized on three levels as described in Figure 3, each level may be seen as adding more customer value. The core product answers what the buyer is really buying. It stands at the centre of the total product. At the second level the core benefit is turned into an actual product. Quality level, product features, styling, a brand name and packaging need to be developed. Finally, an augmented product around the core and actual product is built by offering additional customer services and benefits. Thus, a product is more than a set of tangible features. The biggest competition tends to take place at the product augmentation level. Benefits that are added to the offers should not only satisfy but also delight the customer, and this costs money. Marketers should thus ask whether customers will pay enough to cover the additional costs. (Kotler et al. 2008, 501–502.)

In the narrowest way, *price* means the amount of money that is charged for a product or a service. But when broadly discussed, price is the sum of all values that consumers exchange for the benefits of having or using a product or a service. Price is the only element in the marketing mix that produces revenue: all other elements bring costs. (Kotler et al. 2008, 639.) Although some theories describe the price with no need to be monetary only, that is, it can mean anything that can be exchanged for the product or service e.g. time, energy, or attention, it needs to be stated here that this thesis deals only with the monetary side of the price.

Place means the way how the product gets to the customer. Place includes company activities that make the product available to the target group. It contains the physical distribution and conventional retail in channelling products from the producer to the consumer. (Kotler et al. 2008, 50.) Usually, and also in this thesis the place means the point-of-sale, that is, the grocery stores. *Promotion* includes advertising, sales promotions, public relations, personal selling and direct marketing tools which aim at communicating customer value and building customer relationships (see Figure 4).

Figure 4 The blended mix of promotion tools

Advertising means any paid form of non-personal promotion of ideas, goods or services. Sales promotion means short-term incentives to encourage a purchase of a product or service. Public relations (or PR) entail building good relations with the company's publics by getting favourable and building up a good corporate or brand image. Personal selling means personal presentation by the company's sales force for the sake of sales and customer relationships. Finally, direct marketing means connections with carefully targeted consumers both to receive an immediate response and to cultivate lasting consumers. Each of these involves specific promotional tools that are used to communicate with consumers. For example, advertising contains broadcast, radio, print, online, and outdoor, to name a few. Sales promotion includes discounts, coupons, point-of-sale displays, samplings and other demonstrations. Personal selling contains for example sponsorships, press releases and events. Direct marketing contains for example catalogues and personated offers sent by mail. Due to the new technologies, especially all possibilities online and with mobile, more and more companies are moving from mass communication to more targeted communication. (Kotler et al. 2008, 691–692; 697.)

The place in this thesis means the physical environment which the consumers choose for purchasing groceries. The product element is discussed in this thesis in the form of impulse buying, that is, the factors influencing the decision of buying something new or different than normally. The price is a part of the promotional activities and discounts. The promotion contains all possible online and offline bought, owned and earned marketing activities for the stores in question. These are presented next.

2.3 Defining bought, owned and earned media

The division of media into bought, owned and earned is quite commonly used in the media field in general in Finland. This is the reason why this categorizing has been chosen to this thesis.

Bought media contain all media that can be paid and basically controlled by the company itself. They contain print media (newspapers, magazines, and direct mail), broadcast media (radio, television), display media (billboards, signs, posters) and online media (such as newsletters and search engine marketing). These are sometimes called also as non-personal communication channels since these are media that carry messages without any personal contact or feedback. These kinds of media affect buyers directly. Additionally, using e.g. mass media such as television, often affects consumers indirectly by causing personal communication. The communications flow from television or other mass media to opinion leaders. After that the flow continues from the opinion leaders to other people. Thus opinion leaders step between the mass media and the audiences, and they bring messages to people who are less exposed to the media than them. (Kotler et al. 2008, 709.) In addition, bought media have a bigger ability to reach both non-customers and current customers than other media types (Harrison 2013, 184).

Many studies have investigated the importance of likability as a factor affecting advertising recall especially within bought media. Ewing, Napoli and Du Plessis have written an interesting study about the factors influencing the recall of food product television advertising. Recall has been considered a measure of advertising effectiveness for quite some time, with extensive argument of both merits and disadvantages of using this criterion. Often, recognition and recall are used as synonyms. Ewing et al. found out that there are differences in liking between food categories. Fats, oils, and sugars (including chocolates and sweets), pet foods, condiments and combination meals are more liked and recalled than bread, cereals, rice, pasta, fruit and vegetable television adverts. They also noticed that women both like and recall food advertising more than men. The study revealed a clear correlation between liking and recall: the higher the liking of a food advertisement, the higher is its recall. (Ewing, Napoli and Du Plessis 1999, 32–33; 35.)

Owned media are the media type that the company owns and can mostly control. They are most often companies’ own websites or brochures. When talking about a company website, it can basically be either a corporate or a marketing website. Corporate websites are designed to build customer goodwill rather than to sell the companies’ products directly. They often handle interactive communication that has been initiated by the consumers. It offers information in order to answer customers’ questions, build closer relationships with clients and generate excitement about the company in question. The corporate website also usually provides information about the company history, the mission and the philosophy, as well as the products and services it offers. A marketing website, however, engages consumers in an interaction that aims at moving them closer to a direct purchase or a desired conversion. With this kind of a website, communication and interaction are initiated by the marketer. It might include, for instance, a catalogue or promotional features such as coupons and contests. (Kotler et al. 2008, 850.) Both owned and earned media (earned media are described more closely next) have greatest attraction among existing consumers (Harrison 2013, 184).

Earned media – as the name implies – are the kind of media that the company with the help of its products or services earn in some way. They are typically some kind of word-of-mouth: offline or online, and are most typically present in, for example, social networks. They are the most effective media especially among company’s fans, that is, people who already are customers and want to share their experiences with others on different kinds of networks. This media type can also be called as personal communication. It means that two or more people communicate directly with each other, either face to face or online. These channels are effective because they allow for personal addressing and feedback. Usually earned media cannot be controlled by the company. However, companies can take steps to put personal communication channels to work for them. They can, for instance, create opinion leaders whose opinions are sought by others. This is also called buzz marketing: cultivating opinion leaders and getting them to spread information about a product or service to others in their communities. Companies could also work through community members such as radio personalities. In addition, influential people could be used in the advertisements in order to increase sales. (Kotler et al. 2008, 708.) Earned media have a more difficult job in reaching non-customers than the bought media (Harrison 2013, 184).

When the bought, owned and earned media are discussed from the consumer’s perspective, the differentiation between these three is not by any means clear. Especially digital sources may encounter consumers with the kinds of information and advertising that it’s nearly impossible for the consumers to differentiate between the various media. Brands should embrace both digital and social media along with tactics which are relevant to the clients, and they should also work in line with the traditional media plans. What is really dominant in the current environment in consumers’ lives is that the consumers are always on: this means that they can all the time consider potential purchases and evaluate the goods and services in different markets. Consumers can be always on, either actively or passively. Due to the rapid increase of mobile devices, the consumers are not any longer restricted to certain information sources while looking for products or services. Looking for products is no longer dependent upon location. (Powers, Advincula, Austin and Graiko 2012, 479–480.) The following Figure 5 represents a more thorough list of the media within the bought, owned and earned media categories.

Figure 5 Describing the content of bought, owned and earned media

Bought, owned and earned media have been discussed a lot recently in the face of the new digital environment and consumer behaviour. Pete Blackshaw calls online paid and earned media as Media Mix Modeling 2.0 (ARF Experiential Learning 2010, 2). He states that paid and earned media complement each other. In his review of former discussion, he concludes that brands should aim at shifting closer attention and resources from the bought media to the earned media. This is because marketers tend to lead toward bought media due to its predictability, suitability with existing media processes, and its being easily targeted and precise. Earned media, on the other hand, is mostly present in social networks and online discussions but can show either positively or negatively for the brand. (Blackshaw 2010, 2–3.)

The media environment has indeed been changing for some time already, and the biggest effect has been caused by the rapid growth of social media. This contains for example technologies that put the consumer in more control, the rapid increase of the types of platforms through which the media can be consumed, and the rapidly growing phenomenon of interactivity. It appears, however, that marketers still lack the information they would need in order to target the messages in this more complex media consumption environment. In addition, the comparability between different media solutions is tricky: how to for example compare a euro spent on television with one spent on social media, pre-rolls, print or radio? What is the most effective way to leverage a marketing budget across media and time for the greatest sales impact? Taylor et al. examined the relative impact of exposure to television and online advertising using single-source data, and discussed the challenges beneath building knowledge about cross-media advertising effects measurement. (Taylor, Kennedy, McDonald, Larguinat, El Quarzazi and Haddad 2013, 200–212.)

By examining ten different brands in two categories, that is, stable and impulse, in different time periods, the relative impact of television and online advertising on households' aim to purchase was compared by Taylor et al. The brands in their study were well-established brands in Europe. Even with the changes to the media ecosystem, for example bringing social media and a variety of other online activity in, they ended up having results that were consistent with the previous empirical work: a single television exposure still stimulates sales among those who are exposed to it. Television advertising remains very important as it still effectively drives sales despite the rapid increase of social and digital media. They also found out that online advertising improves campaign reach, but not much if this is duplicated. Indeed: when duplication occurs, it tends to happen in households with heavy-viewing consumers who also see the advertisements of many competing brands. The impact and effect of media in making consumers purchase also varies between product categories and brands. It is thus unclear whether the duplicate effect of online and offline media would hold for less-established brands, for durables, for services, and for other combination of media. (Taylor et al. 2013, 13.) A lot of further research is thus still needed. Next chapter focuses on other possible factors influencing the grocery store choice and the concept of impulse buying.

3 Factors affecting the choice of grocery store and impulse buying

In addition to grocery store advertising, there are a few other important themes that should also be covered in this theoretical part of the thesis. Indeed, consumers typically visit several different stores, which as such raises the issue of how a specific grocery store could take a greater share of the market and consumers' spends. The basic assumption demonstrating consumers' choices is that relying on a rational perspective, where a choice is made after carefully considering all different options from a set of alternatives (Cinjarevic et al. 2011, 5). However, changes in both technology and culture have affected the way shoppers engage with brands and retailers and also how they make decisions about where and how to spend their money. The path to actual purchase has evolved as shoppers transition between online, mobile and traditional shopping. The rise of online shopping, mobile technology and social media has not only influenced the behaviour of the consumers but also their needs and expectations. (Gray 2013, 1–2.) Next sub-chapter describes loyalty programs and their possible effects on the grocery store choice.

3.1 Loyalty programs

When brand advertising is considered, many issues need to be taken into consideration. These contain for example the values and attitudes of the target group, and the media that they use. In addition, the advertising of competitor brands should be analysed as well, especially when the advertising of own and competitor brands takes place at the same time.

A possible factor influencing Finnish consumer behaviour on grocery store choice is that of loyalty programs. While SOK and Kesko have a huge share of the Finnish grocery market, also the promotions and discounts provided by the loyalty programs of these chains, that is, S-Etukortti and Plussa-kortti, may have an impact on Finnish consumers' purchase behaviour as they are giving their members discounts in the grocery stores. This chapter highlights some of the promotional activities that can be done through the loyalty programs.

A loyalty program can be defined as an integrated system of individualized marketing actions that aim at increasing consumers' loyalty through personalized relationships that stimulate their purchase behaviour. Retail loyalty programs in Europe in general are mainly based on promotional features, and customers pay less for goods when they use loyalty cards. Typically loyalty programs induce a self-selection process among loyal buyers who also tend to live closer to the store. This is because the rewards enable them to earn benefits faster. These customers also perceive bigger value in the loyalty program. However, it is not reasonable to assume that an improved customer relationship will create more demand and loyalty per se, because most consumers buy only what they need and can be loyal to multiple stores. (Meyer-Waarden and Benavent 2007, 346; 348; 355–356.)

Shopping pattern choice indeed involves multiple decisions: consumers must decide whether to visit a single store or several stores, which stores to visit, how to organize the trips to the stores, and how to allocate the grocery budget across the stores. When a store can provide an overall advantage over its competitors, it is likely to become the single choice. But when the advantage is only partial, consumers are more likely to choose it as a part of a set of stores. (Vroegrijk, Gijsbrechts and Campo 2013, 608–609.) Interestingly enough, when it comes to the grocery shopping budget, it seems that using smart shopping carts, i.e. carts equipped with scanners that track the total price of a consumer’s shopping basket, reduce spending uncertainty, which then again stimulates budget shoppers to spend more money without breaching the budget. In contrast, the spending is reduced among non-budget shoppers. Non-budget shoppers actually lower the spending by replacing national brands with lower-priced private labels. Budget shoppers, then again, increase the spending by purchasing more national brands. Real-time spending feedback thus improves budget shoppers shopping experience and increases the loyalty toward a specific store. (van Ittersum, Wansink, Pennings and Sheehan 2013, 21; 27–28.)

Felgate et al. investigated in their research the use of loyalty card data from Tesco, one of the biggest retailers in the world, to analyse the impact of promotions. The category that was chosen to the study was beef. They found out that the relationship between promotional activities and sales growth is moderated by the life-stage profile of the shopper. It was also revealed quite clearly that the impact of multi-buy promotions on sales growth is likely to be greater among families than single or dingle households. However, unlike they hypothesized in their research, the impact of price cuts on sales growth was not greater among single and dingle households than families – or at least it could not be shown as true for standard beef category. Their study gave useful insight on how the loyalty card data can enable the researchers to see the differences between shopper segments in their response to various promotions. They also found out that there is a considerable variation in the effect of different promotion mechanics between and within the different subgroups. Clearly thus one promotion does not fit all and promotional strategies should pay attention to the effectiveness at the individual product level. In addition, promotional response is different across different life-stage segments. Generally, spends within families increased the most in response for promotions, and the least for pensioners. (Felgate et al. 2012, 223; 232.)

3.2 Store features and in-store advertising

Why do consumers shop at the stores they do? There are a number of important criteria for consumers when they are choosing a store in general. Wahl has presented the following list:

1. cleanliness
2. all prices labelled
3. good produce department
4. accurate, pleasant clerks
5. low prices
6. freshness date marked on products
7. good meat department
8. shelves usually kept well-stocked
9. unit pricing signs on shelves
10. convenient store location

Wahl highlights two factors which make some stores special. These are the ability to manage to instil ownership in the store customers, and the other is the ability to instil a sense of familiarity in the customer that leads to a feeling of speed and efficiency in shopping. As stated by Wahl more than 20 years ago, a typical consumer enters a store with 20 000 choices, five of which are new daily. The consumer scans more than 300 items per minute while looking for items that he or she might need. (Wahl 1992, 26–27.) And the number of choices that need to be done is nowadays naturally a lot bigger. This is when in-store marketing can be extremely valuable.

In-store marketing as such is not a factor that drives consumers to grocery stores but there is a need to concentrate on this theme in a greater detail because it provides valuable background information to impulse shopping behaviour. In-store marketing is a strategic process for satisfying the point-of-sale needs of the consumer and the point-of-sale business requirements of the retailers. Point-of-sale promotional activities are a part of either bought or owned media. A grocery brand can promote at the point-of-sale for instance through stands, displays and samplings. When it comes to the retailer's point of view, the in-store marketing plan should address at least the following factors: 1) potentially using the space, 2) potentially presenting the products, 3) potentially saving labour, and 4) maximizing the number of units or packages of products in the store, and maximizing the velocity, i.e. how fast the products move. The retailer should thus optimize the in-store opportunity. The retailer and the manufacturer should be able to balance with merchandising considerations such as the store's product selection, location, store layout, advertising, package design, inventory, and price, to name a few.

Each of these should be viewed in light of the in-store marketing issues to achieve the balance of shoppability and retailer profitability. (Wahl 1992, 75; 80–81.)

However, while the efforts have been focused on how marketers should allocate their resources, more attention should be paid to what consumers believe to be the most important media or in-store activity or combination of these activities for them. While the marketer can measure and analyse the impact of various marketing activities, it is the consumer in the end who really knows what does and does not work and what kind of synergy exists between external and internal marketing activities. Additional problem is that external media programs and internal store promotional activities are usually managed by separate groups. The marketer is for example attempting to sell the brand through a retail distribution channel and budgets the media spend with that in mind. Alternatively the retailer does not care what brand the shopper buys as long as the purchase is made in his store. However, consumers have no such media or in-store promotional conflicts. Thus, to be able to understand how advertising impacts in-store promotional material and vice versa, one must start with the consumer. Only they can bring the elements together and can identify which elements are important, which are ignored and which influence their purchase behaviour. (Schultz and Block 2009, 2–3.)

Schultz and Block have analysed how consumers view in-store promotional activities; that is, which ones they consider most important by product category, and which ones they believe have the biggest impact on their purchase decisions. They investigated altogether nine different product categories, of which the food-related categories are represented next as well as the average percentage of the nine categories. In-store activities have a huge influence especially on grocery purchases. The following Table 1 shows the types of in-store promotional activities concerning groceries.

Table 1 The preference percentage (%) of promotional activities

	Special displays	In-store events	In-store signage	Parking lot events	Floor graphic	Information kiosks	In-store TV	In-store radio
Breakfast cereals	47	41	26	27	18	15	17	12
Food storage bags	52	50	32	34	27	22	23	20
Frozen food	45	38	26	23	15	13	14	10
Average	**49**	**43**	**29**	**29**	**22**	**18**	**19**	**15**

As Table 1 shows, consumers prefer and are influenced by different promotional techniques. The numbers on the table describe the percentage share of the target group stating the medium in question having any influence on their purchase in the product category. Eight widely used in-store advertising activities with their consumer preferences in three food categories are compared. For example, special displays seemed to have a strong promotional influence on food storage bags. Interestingly enough, less than every fourth consumer reported that in-store TV had any influence on their purchases in any of the food related categories. The share was even smaller for in-store radio. (Schultz and Block 2009, 8–9.) The next Table 2 shows which activities consumers believe to have the biggest effect on their purchase decisions.

Table 2 The most influential (%) in-store promotional activities

	Greatly influence % (Top=5 on scale 1–5)	Influence (Top 2 Box) % (Top=4 or 5 on scale 1–5)
Product samples	33	57
Shelf coupons	21	45
Reading product labels	20	41
Special displays	17	41
Store loyalty cards	15	34
In-store events	16	34
Coupons on register tape	15	33
In-store signs	8	23
Parking lot / sidewalk	8	19
Information kiosks	5	13
In-store TV	7	13
Floor graphics	5	13
In-store radio	4	8

Consumers were asked to rate the in-store promotional activities which they believe have the most effect on them overall. Participants were asked to rate the activities on a 5 point scale. The second column on Table 2 shows which in-store promotional activities greatly influence them, that is, it was given a 5 on a 5 point scale. The third column shows those which were being rated 4 or 5 on a 5 point scale. Again the numbers on the table describe the percentage share of the target group stating the medium in question affecting them overall. Product samples were reported to have the biggest effect in both the top and top 2 boxes. Those were followed by shelf coupons, and maybe surprisingly, product labels. This data thus shows that consumer-friendly packaging and labelling may have a strong influence on the in-store success. At the bottom of the list were in-store TV, floor graphics and in-store radio. While marketers thus may believe many types of in-store promotional activities are the most efficient methods in leveraging their marketing messages, those should be considered in the light of consumer reported preferences. (Schultz and Block 2009, 9–10.)

According to Vroegrijk et al. the main drivers affecting the grocery shopping decisions are the attractiveness of store’s product selection, price, store environment and distance (Vroegrijk et al. 2013, 608). Most grocery stores provide the customer with same categories. However, the differences in the product selection across stores depend on the variation in the category assortments. Especially, by carrying households’ favourite brands retailers increase the likelihood that the average household will choose their stores. However, the less important the selection is to a consumer’s store choice, the more the consumer often values convenience, such as travel distance. In general, assortments seem to be more important than retail prices in decisions concerning the store choice. (Briesch, Chintagunta and Fox 2009, 176; 187–188.) This sub-chapter has discussed the elements of the store’s product selection and in-store marketing. Next, the chances brought about by impulse buying are highlighted. The focus is also on describing the usage of shopping lists.

3.3 Impulse buying and the usage of shopping lists

Impulse buying taking place in grocery stores is of interest both to retailers and manufacturers. Huge sums are spent each year on advertising the brands to consumers, hoping to increase the top-of-mind, awareness, trial, re-purchases and ultimately the market share. (Abratt and Goodey 1990, 111.) Indeed, in some cases consumers do make choices without carefully thinking through the available alternatives, without sufficient knowledge about the product of interest, or without prior intent of purchase (Cinjarevic et al. 2011, 5). Consumers’ hedonic motives, impulse buying tendency, pre-purchase mood, and demographics, to name a few factors, influence the impulse buying and are thus crucial elements for the managers planning the marketing budgets and marketing allocations for the products. Customers who visit stores with hedonic motives usually stay longer at the stores, and this in turn may increase the likelihood of a purchase without prior intention to buy. This means that in-store activities are in a crucial role also in increasing the possibility of the consumers’ browsing of products. (Gültekin and Özer 2012, 180.)

Grocery store as such is a place of stimuli that is of sensory type. Consumers are confronted by colourful product displays and aligned packages, and even point-of-sale advertising, such as ads covering the floor. For some consumers, these in-store stimuli work as cues in reminding them which groceries they need to purchase. Some consumers, however, enter the store with an intention to buy a specific array of goods, but this is changed as the in-store stimuli leads to purchases that were not intended. Indeed, the in-store stimuli may trigger unrecognized needs and desires, leading to unplanned purchasing. (Inman, Winer and Ferraro 2009, 19.) Impulse buying means that people engage in non-planned, spur of the moment purchase. It is also called as unplanned purchasing, or irrational purchasing. Cinjarevic et al. examined the influence of six broad categories of hedonic shopping motivations (adventure, gratification, role, value, social and idea shopping) and fashion consciousness on consumers' impulse buying behaviour. (Cinjarevic et al. 2011, 4.)

Gültekin & Özer re-investigated in their research if hedonic motives and factors affecting them truly have an effect on impulse buying. As stated, these factors were already researched by Cinjaveric et al. and now were taken a closer look at by Gültekin & Özer. In addition, they reviewed the effect of those motives influencing browsing and how browsing influences impulse buying. The research revealed a clear relationship between hedonic motives and impulse buying. Consumers may look for products without any pre-made intention to buy – just for the fun or pleasure of it. They also stated that consumers who shop with these kinds of motives can bring about a huge potential in making impulse purchases. Store managers could thus invest in becoming the top-of-mind store in the choice set of those consumers. (Gültekin & Özer 2012, 186–187.)

There are two explanations why impulse buying occurs. The first is that of exposing to in-store stimuli which acts as a reminder of shopping needs. The second explanation is the customer commitment hypothesis which means that unplanned purchasing or differences between purchase intentions and actual purchases are attributable to incomplete measure or purchase plans. (Abratt and Goodey 1990, 111–113.) The factors influencing impulse buying were categorized by Muruganantham and Bhakat under four entities: External stimuli, internal stimuli, situational and product-related factors and demographic and situational factors (see the following Figure 6).

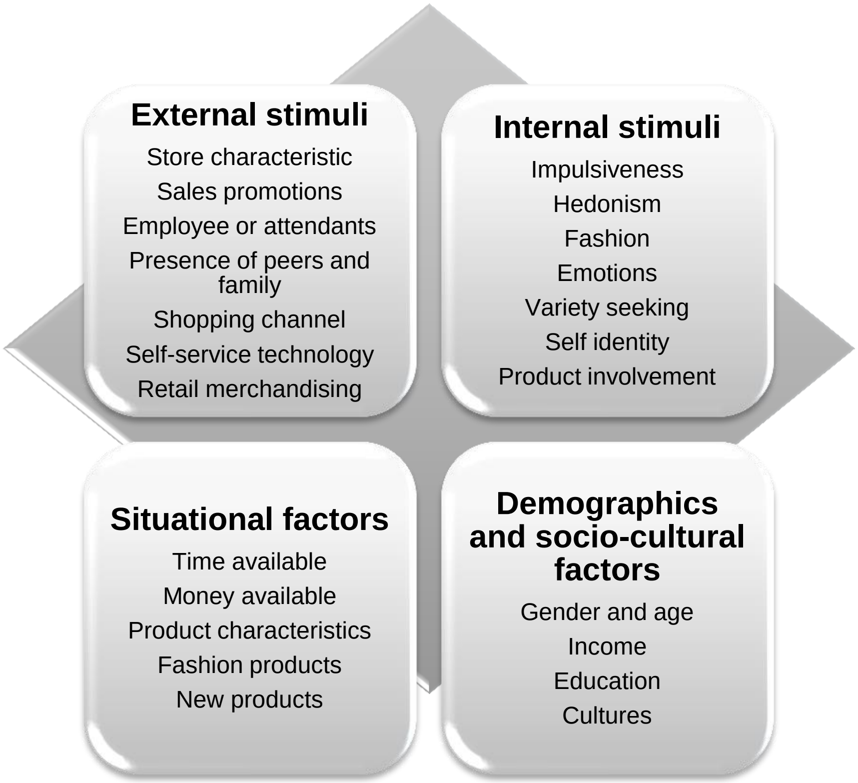

Figure 6 Factors influencing impulse buying behaviour

As presented in the Figure 6, external factors influencing impulse buying are related to the shopping and the marketing environment as such. It may include the store size, ambience, and design, while the marketing environment means the various sales and advertising activities. Internal stimuli, however, are related to various personality issues that characterize an individual rather than the shopping environment. Internal factors of impulse buying include the individual's internal cues and characteristics that make the buyer engage in impulse buying. (Muruganantham and Bhakat 2013, 152–153.)

The bought, owned and earned media as well as the point-of-sale effects are quite well represented in the external stimuli section affecting the buying behaviour. Among the four categories, the most challenging implication of the research done by Muruganantham and Bhakat is the effect of the external stimuli (market and store related factors) on the consumers' impulse buying. This statement makes the results provided by this thesis very interesting, and the thesis thus may bring about many new findings in the field of consumer buying behaviour in the grocery shopping category. As Muruganantham and Bhakat state, this aspect is fully under the control of the marketers. External stimuli could be handled by framing suitable retail strategies in order to entice the potential consumers inside the store. (Muruganantham and Bhakat 2013, 156–157.)

Kollat and Willet found out as early as 1967 that the characteristics of consumers and also their demographics influence the impulse purchasing. In addition, the number of different products purchased has an influence on unplanned purchasing. When the number of products purchased is high, the proportion of unplanned purchases is also high. Also, products which tend to have a low frequency of purchase tend to have a relatively high unplanned purchase percentage. (Kollat and Willet 1967, 24–26.) This piece of work is still very relevant in the literature reviewed by researchers studying buying behaviour and impulse buying of consumers.

Inman et al. examined in their research several product and customer characteristics they expected to affect exposure and to lead to positive responses. They divided the factors to stable (relatively invariable over time) and transitory (variable across trips). The factors influencing the in-store decision making are presented in the Figure 7.

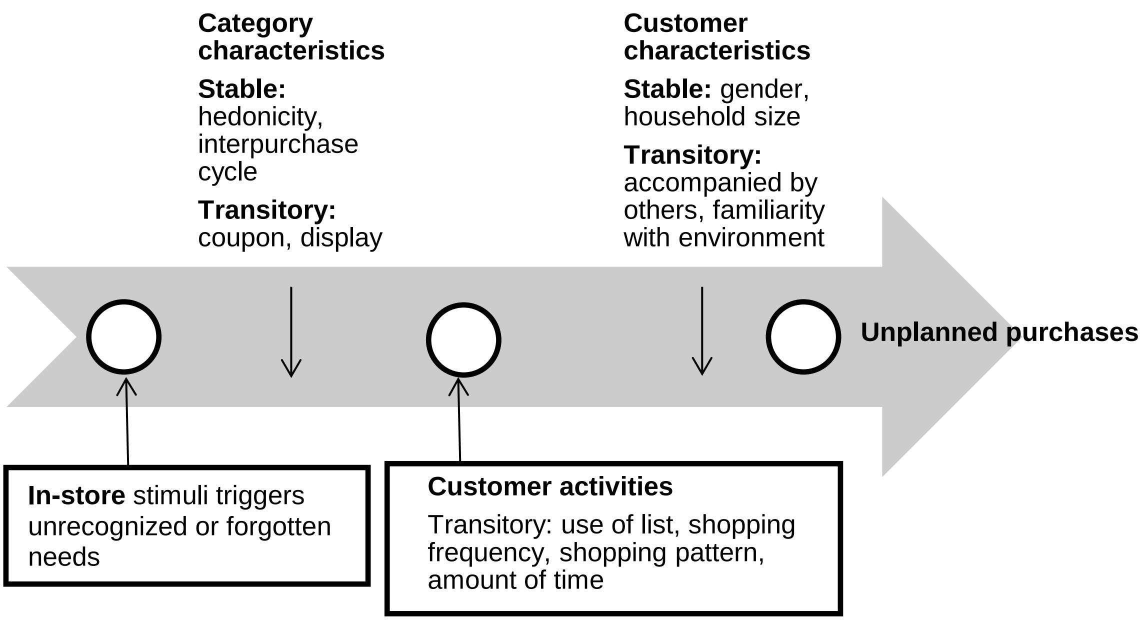

Figure 7 Factors influencing in-store stimuli triggering in-store decision making

The so-called transitory factors at the product-category level can be directly affected by the retailer or the manufacturer. These include, for example, coupons and point-of-sale displays. Transitory customer characteristics can be influenced by marketing activities, and they contain for example shopping companion and store familiarity. Additionally to product and customer characteristics, they examined the influence of customer activities that were limiting in-store decision-making (for example the use of shopping lists, which will be more thoroughly discussed later in this sub-chapter). In-store decisions occur because the stimuli which are encountered during the trip (e.g. point-of-sale advertising) lead consumers to believe that they have a need for the product category in question. (Inman et al. 2009, 19–20.)

The purchase frequency and hedonic nature of the category are relatively stable for the particular product category. Coupon usage and in-store displays are, on the other hand, transitory in nature, and their effect should operate through the degree to which they entice exposure to point-of-sale stimuli. Having a coupon for an item usually results in a greater likelihood of a planned decision. In-store displays draw attention and thus increase the likelihood of unplanned purchases. However, consumers have greater recognized needs for frequently purchased products. They are likely to have so-called scripts in place for the shopping, and the habit of purchasing that specific item is likely to become a part of that script. Unplanned purchases are usually less likely for products that are bought more frequently and have a shorter inter-purchase cycle. Hedonic goods are more likely to be purchased on impulse than functional products. (Inman et al. 2009, 20–21; 25.)

The customer characteristics may increase in-store need recognition. Inman et al. examined the role of gender, household size, store familiarity, and shopping alone versus with others. Stable customer characteristics contain gender and household size. They found out that women engage more in in-store decision making because they tend to do the grocery shopping more frequently, hence they make more unplanned purchases than men. They also expected that the larger the household size, the more in-store decision making will occur. However, surprisingly this was not the case. Results also indicated that greater familiarity with the store has a positive influence on unplanned purchases. Customer activities play also an important role in investigating the in-store activities. These are all transitory in nature. However, it was found out by Inman et al. that using a shopping list will reduce the likelihood of making unplanned purchases. The usage of shopping lists is discussed in depth next. Frequent shopping reduces the likelihood of making unplanned purchases, whereas the more aisles are visited, the bigger the likelihood of unplanned purchases. Also the amount of time spent in the store, as well as paying with some other method as cash increase the number of unplanned purchases made. (Inman et al. 2009, 21–22; 25–26.)

The usage of shopping lists as an external memory aid to consumers' grocery shopping has been vastly investigated. Block and Morwitz analysed the shopping lists and actual purchase behaviour of consumers during multiple grocery shopping trips over a 2-month period in 1999. They found out that consumers record on their lists approximately 40% of the items they ultimately buy. In line with previous studies, Block and Morwitz found out that consumers write goods on their shopping lists for which there are either financial incentives to remember, need-based incentives to remember, or schema-based advantages to remember. (Block and Morwitz 1999, 353.) See the following Figure 8 for factors influencing the usage of shopping lists.

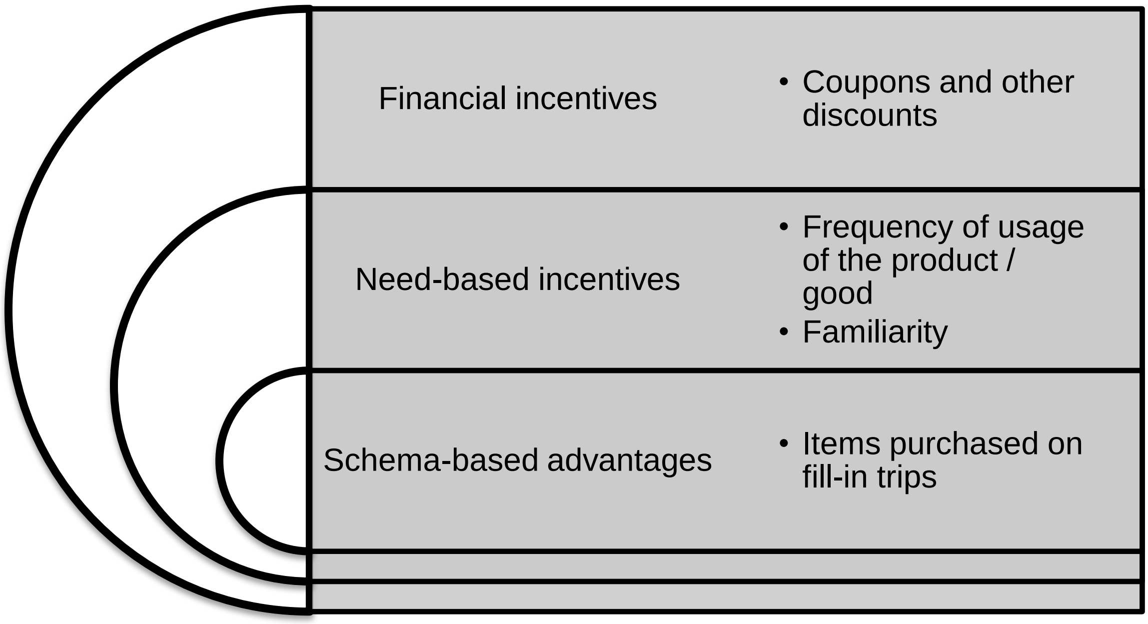

Figure 8 Factors influencing the shopping lists

According to Block and Morwitz (1999, 353), 80% of items written on shopping lists were actually purchased. The probability of purchasing an item given an external aid was used for the product seems to be (Block and Morwitz 1999, 365):

1. greater if the buyer has participated in the list writing
2. greater the larger the household size
3. greater during holiday periods than non-holiday periods
4. greater the more frequently the consumer makes purchases in the product category
5. greater during major trips than fill-in trips
6. lower the more expensive the item
7. greater in categories in which manufacturers' coupons are frequently available

8. lower in categories in which feature advertising is frequently used
9. greater for older and younger heads of households.

They also found out that the probability a different brand was purchased given an external aid was used for an item at the brand level is greater if the consumer shopped in a store that was less familiar, greater the more expensive the item, lower in categories in which manufacturers' coupons were frequently used and lower for older and younger heads of the household (Block & Morwitz 1999, 365). Next chapter focuses on the research method and the data collection, after which the results of the thesis are presented.

4 Research method and data collection

Market research is the systematic process of designing, collecting, analysing and reporting of data that is relevant to a specific question at hand. The process typically has four steps: defining the problem and research objectives, developing the research plan, implementing the research plan and interpreting and reporting the findings. Defining the problem and research objectives should be paid close attention to. Once the research problems have been defined, researcher must decide the exact information that is needed, and develop a plan for gathering the data. (Kotler and Armstrong 2010, 129–130.)

4.1 Research method

A research method is the logic that links the data to be collected to the initial questions of the study and ultimately, to its conclusions. It is an action plan for the researcher to get from the initial questions to be answered to a set of conclusions about these questions. There are many steps between these two extremes, containing the collection and analysis of relevant data. (Yin 1984, 27–29.) The research method consists of those practices and operations with the help of which a researcher produces observations. The chosen methods should go hand in hand with the theoretical frame of reference. (Alasuutari 1993, 64–65.) Research method can be either qualitative or quantitative. The qualitative approach has also been called as soft, subjective, or a non-numeric method. The quantitative approach, however, has been seen as merely a numeric and objective method. (Eskola and Suoranta 1998, 13–15.) In general, these two approaches are different in the way they see the data. The methods represent different views on how the data is collected, handled and discussed, and what the status of the researcher is. This research was conducted using quantitative data collection method.

Surveys are an important form of quantitative research in a way that they do not involve any manipulation of participants or their circumstances in advance. Because they contain information from respondents about their knowledge, beliefs, attitudes, values and behaviours, they can, at best, explore relationships between variables. Surveys are thus totally dependable upon the information provided by the respondents. The data for surveys can be collected in several ways. Respondents can complete the questionnaires by themselves, or an interviewer can ask questions from the survey respondents. When collecting the data with self-completion questionnaires, the questionnaires need to be self-explanatory because the respondents are not guided through the questionnaire by the researcher in person. (Gunter, in edited by Jensen 2002, 214–215.) In this survey, an online panel was used, and the respondents completed the questionnaires by themselves. Self-completion questionnaires were posted to the respondents by email.

The terms of reliability and validity are linked closely to market research in general. Reliability means that same results are to be received when carrying out repeated tests among different groups of people and as well as when several researchers run the same test. In this case, the reliability aspect of the research is valid. With a number of respondents being 1000, the results should be of similar type no matter in which online panel the data have been collected. In addition, the results are not dependable upon the researcher as the respondents have completed the questionnaires themselves. Validity as a term then again means that the methods used for research are suitable for the research problem. In these kinds of consumer journey process surveys, quantitative data collection is a commonly used data collection method.

4.2 Sample and data collection

The importance of sampling cannot be over-emphasized in quantitative research. The individuals in a survey should represent the total population from which they are drawn, i.e. the target group. This is to ensure that generalizing the findings can be done as a whole. (Gunter, in edited by Jensen 2002, 215.) The sample should thus be representative enough so that the researcher can make estimates of the thoughts and behaviours of a larger population (Kotler and Armstrong 2010, 139).

Designing the sample consists of three steps: 1) who is to be surveyed, 2) how many people should be surveyed, and 3) how should the people to be chosen to the survey. (Kotler & Armstrong 2010, 140.) In this thesis, the target group consists of Finnish consumers who are at least somewhat responsible for grocery shopping in their households. Sample size of 1000 among 15–74 year old consumers was chosen in order to get representative sample of the Finnish population. The data was collected using an online panel of Norstat Finland which is a full service data-collection agency. Regarding this thesis, the questionnaire was planned by the researcher, and the data was collected through Norstat's panel. The online panel has been gathered following the rules given by ESOMAR. It is an organisation for encouraging, advancing and elevating market research worldwide, and has structured questions that a research buyer can ask to determine whether a sample provider's practices and samples fit with the research objectives. The rules given by ESOMAR are presented in the Appendix 2.

The challenges confronted by the researcher were focusing on determining the ultimate research objective. It namely changed a few times along the way, as the researcher tried to sell the data to her employer's, that is Dentsu Aegis Network company's, clients. In the end, the employer bought the data for segmentation and media planning purposes. These challenges led the researcher to finalize the questionnaire only a few days before the start of the data collection. This is also the reason why the survey results cannot be analysed in this thesis in a detail, as the data are used also in the employer company. The survey results can be analysed only among the total respondent group, by gender, by age groups, and by region. There were also some additional themes covered in the questionnaire that could not be reported in this thesis.

A questionnaire is usually the most common instrument used in collecting quantitative data. Closed-end questions include all possible answers so the respondent easily finds the correct response option. Examples of closed-end questions include for example multiple-choice questions and scale questions. Open-ended questions allow respondents to answer in their own words. These kinds of questions are useful in cases where the researcher tries to find out what people think but not measuring how many people think in a similar way. Closed-end questions provide then again answers that are easier to interpret. (Kotler and Armstrong 2010, 142.) This survey's questionnaire contained mostly closed-end questions. The quantitative online survey questionnaire was planned and structured, and the data collection was done between the 19th and 24th of March, 2014. Interpreting the findings, drawing the conclusions and reporting the results close the research process (Kotler and Armstrong 2010, 143). Analysing the survey data has been done with an SPSS program, which is a widely used program for statistical analysis in market research. The main results of the survey are presented in the next chapter.

5 Findings from the survey

This chapter of the thesis represents the main findings of the study. The first sub-objective of this thesis was to describe grocery shopping frequency, in addition to other relevant background information related to Finnish consumer behaviour. This will be discussed first, after which the second sub-objective, i.e. the shopping companion and the decision-maker concerning the choice of grocery store will be emphasized in the sub-chapter 5.2. This is followed by the third sub-objective: analysing the usage of shopping lists and impulse buying as a phenomenon. The main research objective of this thesis was to define the effects of bought, owned and earned media on the grocery store choice (preferred and a different store). This will be discussed finally in sub-chapters 5.4. and 5.5.

5.1 Background information

This sub-chapter focuses on grocery shopping frequency, the most visited grocery stores as well as the most considered stores for grocery shopping all in all. The frequency of visiting grocery stores is presented in Figure 9.

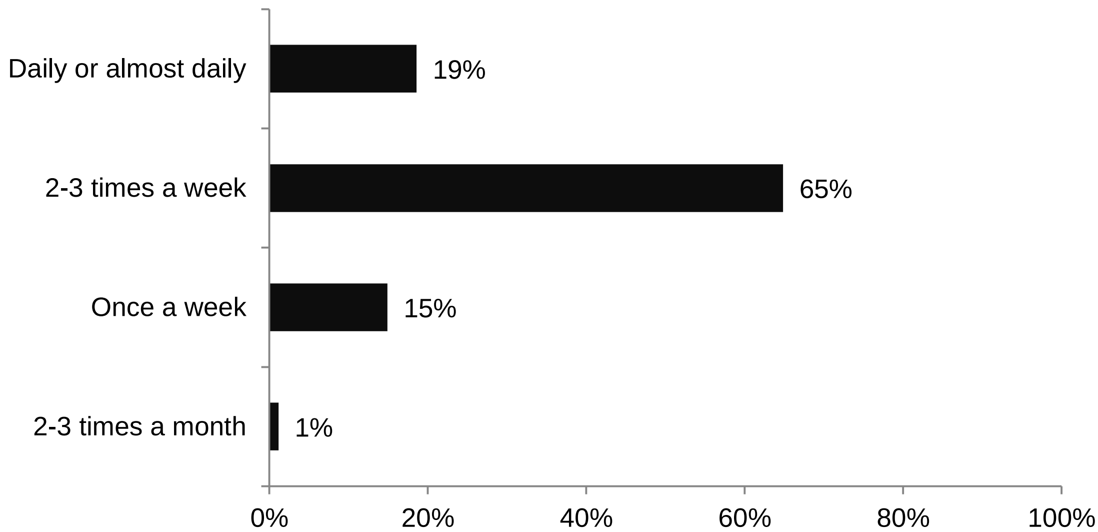

Figure 9 The frequency of visiting grocery stores

As can be seen from the Figure 9, most people do grocery shopping most typically 2–3 times a week. On average, a fifth of all grocery store visits takes place daily or almost daily. The share of daily grocery shopping is relatively higher among those who live in the Southern part of Finland and in bigger cities: the share of daily grocery shoppers is as high as 30% among those who live in Helsinki, for example. This is most probably explained by the proximity of various grocery stores which makes it easier for the consumers to make purchases on a more frequent basis. The frequency of visiting grocery stores seems to correlate with age as well. The share of those who visit a grocery store only once a week is relatively higher among 15–24 year olds. However, it should be noted that a part of these respondents still live with their parents and thus they do not always take care of the main grocery shopping in their families. Understandably, the share of only once-a-week visits is clearly lower among 35–54 year olds. Due to most of them having families, one visit per week is not enough. The share of only once-a-week visits is then again bigger among 65–74 year old respondents who have smaller households.

The Place of Kotler’s 4Ps is discussed next. The place contains the physical distribution and conventional retailing in channelling products from the producer to the consumer. In this context the place means the point-of-sale, that is, the grocery store. The following Figure 10 represents the most often visited grocery stores among Finns.

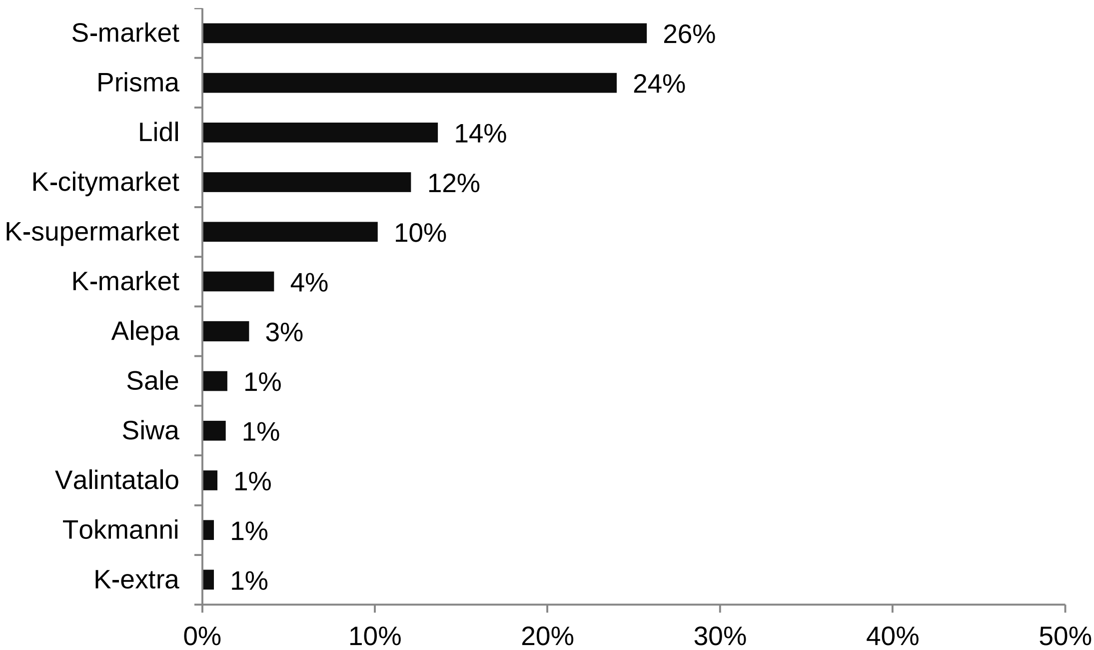

Figure 10 The most often visited grocery store

As can be seen from the Figure 10, the stores of the S chain are clearly preferred among Finnish consumers in general. When the respondents were asked which store they usually go to, i.e. which one they prefer when shopping for groceries, half of the respondents chose a store of the S chain, namely S-market or Prisma. The share of Lidl is very high as well (14%), and most probably it will keep on growing in the future. Lidl has been aggressive in taking shares of the Finnish grocery market, and especially in recent times it has succeeded in getting Alkos in the proximity to the stores: a competitive advantage that the grocery stores of both S and K chains have previously had. K stores are preferred by approximately a fourth of Finnish grocery shoppers. Both K-Supermarket and K-Citymarket are preferred more than average among those who live in Varsinais-Suomi (total preference for stores of the K chains was 36%). Interestingly enough, the preference of stores of the S chain is then again a lot higher in Pirkanmaa. Lidl seems to be relatively strong in Varsinais-Suomi, where the preference for Lidl is 20%. The following Table 3 shows the preference shares of the biggest stores in Uusimaa, Varsinais-Suomi and Pirkanmaa.

Table 3 The shares of K stores, Lidl and S stores

	Uusimaa	**Varsinais-Suomi**	**Pirkanmaa**	**Total**
K-Citymarket	13%	17%	10%	12%
K-Supermarket	12%	13%	6%	10%
Lidl	16%	20%	15%	14%
Prisma	20%	22%	31%	24%
S-Market	21%	14%	27%	26%

As can be seen from the Table 3, the preference of the S chain grocery stores is also relatively somewhat lower in Uusimaa than among the total population. This as well as the lower preference in Varsinais-Suomi can be at least partly explained by the political landscape in Finland. Traditionally the S chains have been preferred by those with an SDP background, and the preference of the K chain might correlate with that of Kokoomus. This would however require a deeper investigation and analysis, and will be an idea for further research. All in all S and K chain comprise of approximately 80% of the Finnish grocery market. These two chains clearly dominate in smaller cities and municipalities. Privately owned grocery stores can still somewhat cope in bigger cities, although their shares are decreasing in those as well.

In addition to the primary store, the respondents were also asked which other stores they visit at least every now and then. The following graph shows the total usage of grocery stores among the total population in Finland. The percentages shown in the graph represent the sum of the preference and the consideration for the grocery stores in question. Alongside with the big markets of both the K and the S chains, Lidl has truly succeeded in taking a position among Finnish consumers' minds when they are shopping for groceries. 72% of Finns state that they at least every now and then visit Lidl for grocery shopping, as the share is approximately the same for K-Citymarket and even smaller for K-Supermarket. S-market leads in the total usage with approximately 90% of Finnish consumers visiting the store at least every now and then.

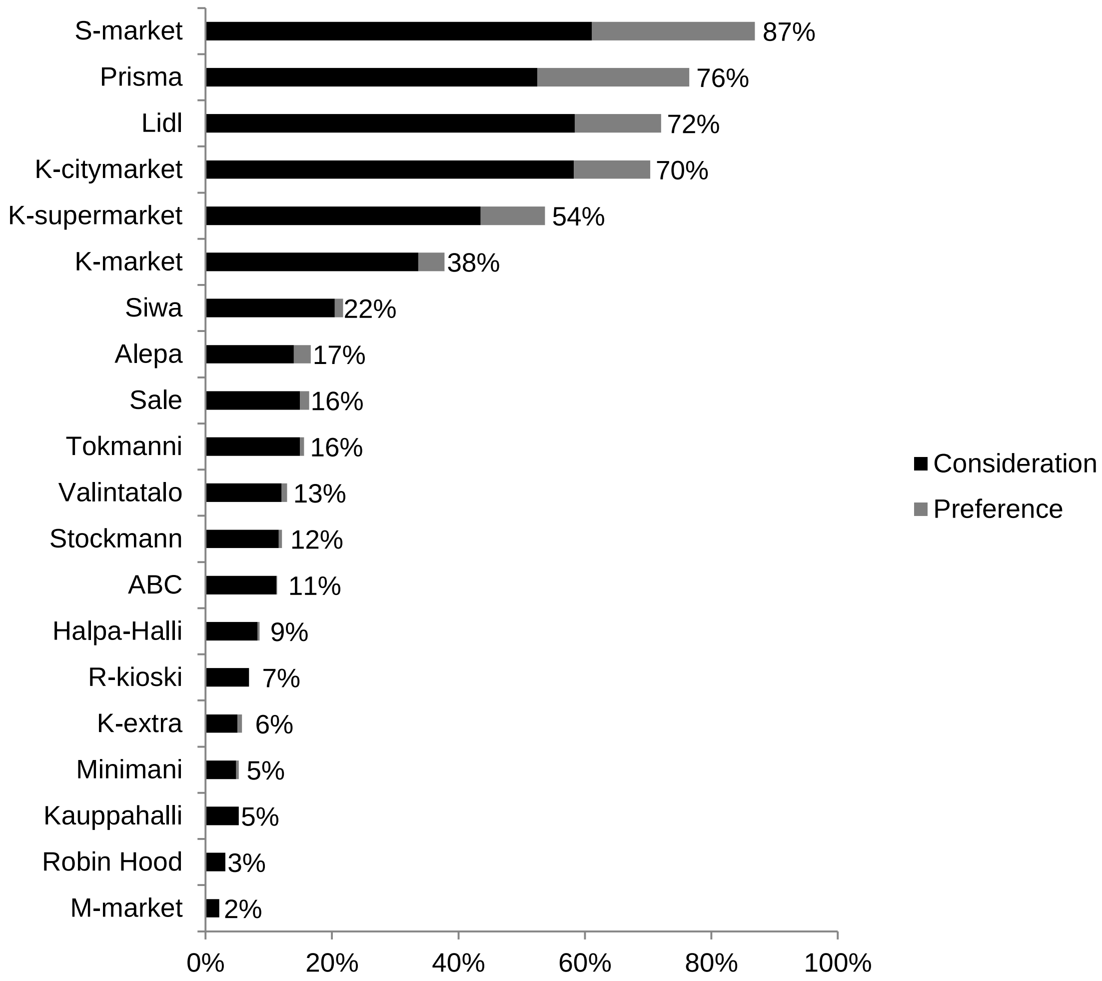

Figure 11 Grocery stores visited at least every now and then

The stores with less than 20% visit rate (visits at least every now and then) are typically smaller and local ones, and they are not present on a national level. For example Alepa is a grocery store chain that is a part of the S-group and is present only in the capital region. Sale is a similar grocery store chain with presence in smaller cities, especially in Pirkanmaa and Varsinais-Suomi. The following Figure 12 shows the shares of the at least every now and then visited grocery stores by regions Uusimaa, Varsinais-Suomi and Pirkanmaa against the total average among Finnish consumers.

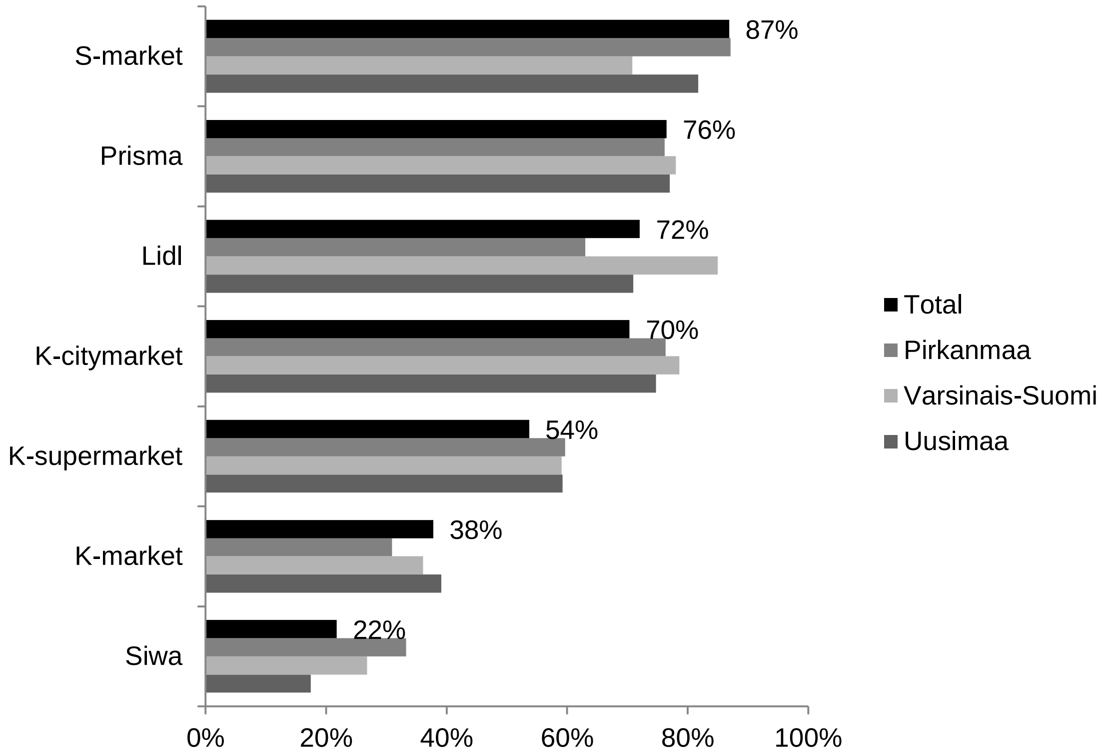

Figure 12 Grocery stores visited at least every now and then by region

When compared by region, the share of K-Citymarket of the grocery stores that are visited at least sometimes is above average in Varsinais-Suomi (79% versus 70% among the total population). Lidl is very strong also especially in Varsinais-Suomi with as high as an 85% visit rate. Siwa is visited relatively more typically in Pirkanmaa region and more seldom in Uusimaa. Smaller local stores account for plenty of visits in different regions. The share of Alepa in Uusimaa is 50% (visits at least sometimes) and that of Sale 31% in Varsinais-Suomi. Next sub-chapter discusses the second sub-objective of this thesis, namely the shopping companion at the grocery store and the decision-making roles when deciding where to go for grocery shopping.

5.2 Shopping companion and the decision-maker

Respondents were asked to think about a situation when they visited another store than the one they typically visit. The shopping companion when visiting a different store was asked first. When a different store was visited, half of the visits were made alone (see Figure 13). Fourth of the visits were done with a spouse, and only 4% were visits done with the whole family. Of 25–34 year olds, 13% visited the store with the whole family.

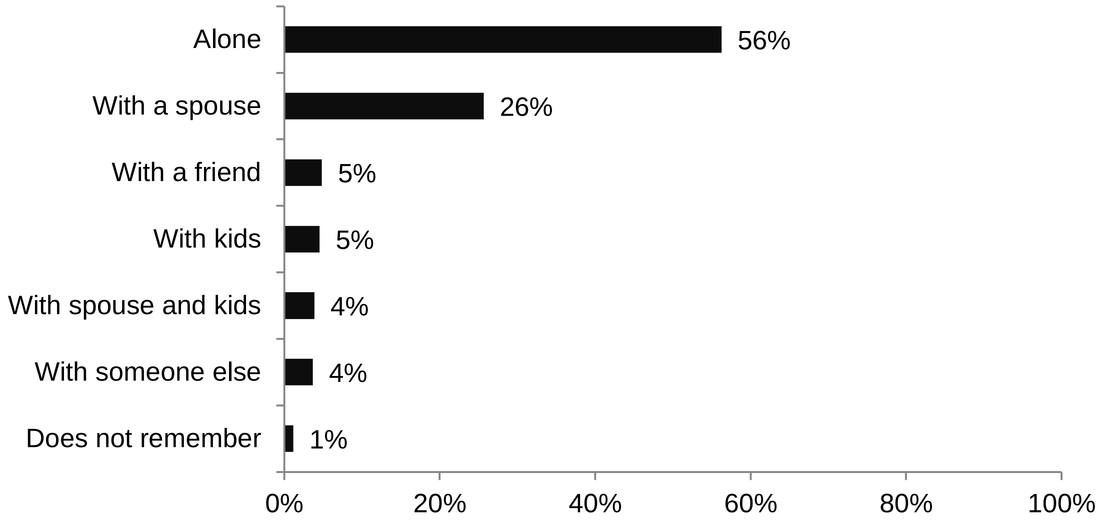

Figure 13 Shopping companion at the different grocery store

However, the decision concerning the store selection was primarily done by the respondents themselves (82%). On average, in 9% of the visits to a different grocery store the spouse made the decision. Women were responsible for the store selection more typically than men, as can be seen from the following Figure 14.

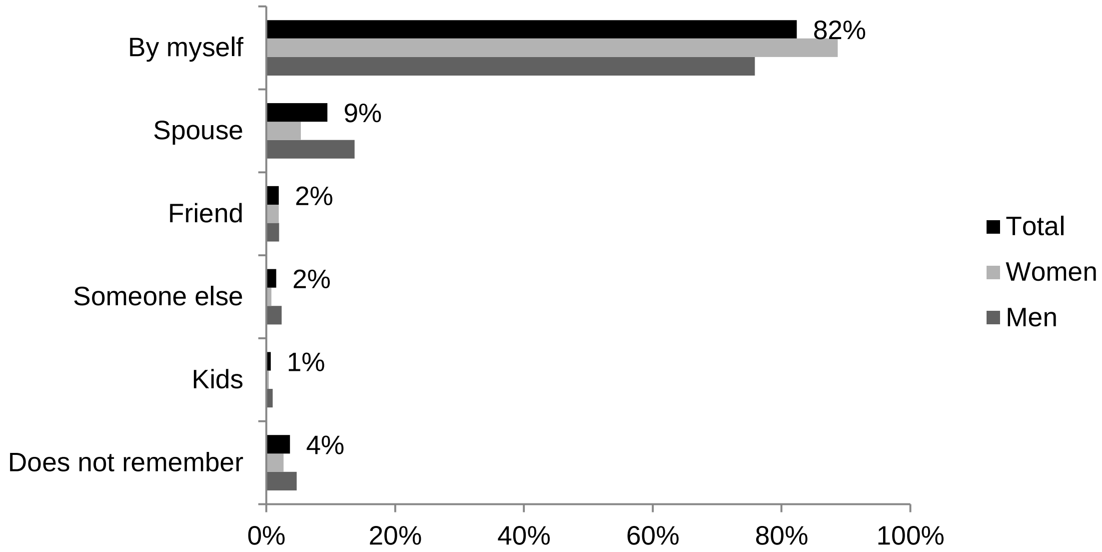

Figure 14 Decision-maker concerning the choice of a different grocery store

Of women, 89% made the choice of the grocery store themselves (versus 76% among men). Among men, spouse was the decision-maker concerning the store more often than among women (14% versus 5%, respectively). Inman et al. examined in the research paper the role of gender concerning the in-store decision making, and they found out that women engage also more in that because they tend to do the grocery shopping more frequently.

Kotler et al. presented the product as an item consisting of maximum three different levels: core, actual and augmented. Groceries can be seen as fulfilling two levels of the product, that is, core and actual. The core product answers what the buyer is really buying, and at the second level the core benefit is turned into an actual product with a brand name and packaging. The augmented level with installation or warranty services is seldom present when talking about groceries. The number of products bought at the grocery store was of interest next. When the respondents visited a grocery store the last time, on average the shopping basket mostly consisted of 6–10 items (38%). Nearly a third of the baskets contained 11–30 items (see Figure 15).

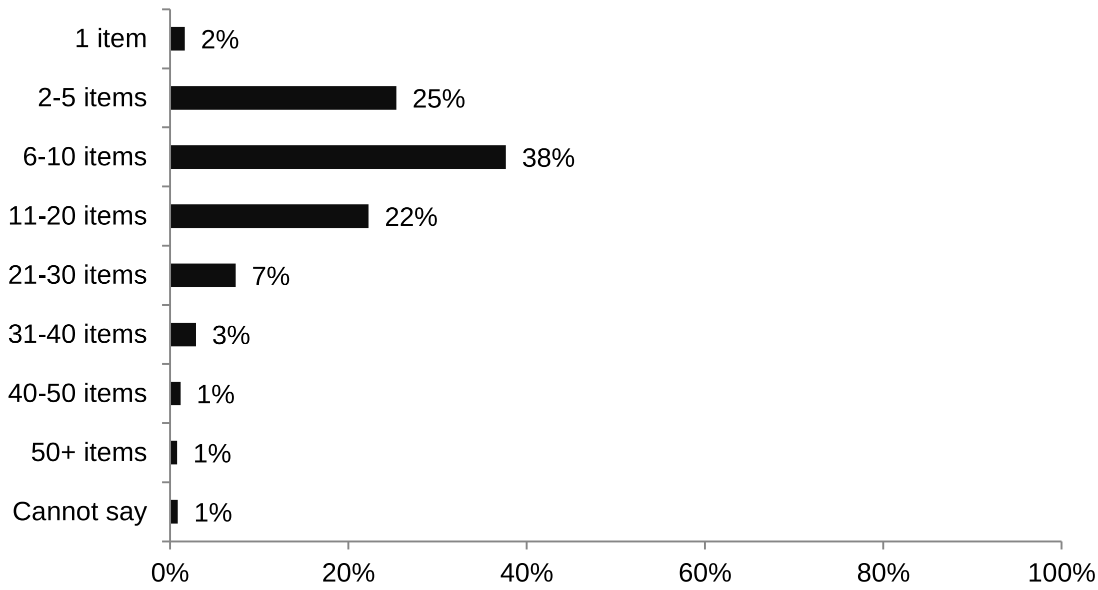

Figure 15 The amount of items bought last time at the grocery store

As can be seen from the Figure 15, 65% of all shopping baskets contain maximum of 10 items. The share of these smaller basket sizes is relatively bigger among 15–24 year olds and 55–74 year olds. The share of maximum 10 items in a grocery shopping basket is as big as 79% among the 65–74 year olds. Whereas on average every third grocery shopping basket contains more than 10 items, the share of these bigger basket sizes is 43% among 25–44 year olds. This can also be explained by the family sizes: the amount of goods bought at the grocery stores is naturally higher in bigger families. In addition, single and dingle households' shopping basket is clearly smaller than those of families: 35% of single households shopping basket contain maximum 5 items when the corresponding share among the total population is 27%. Next sub-chapter concentrates on the shopping list usage and the concept of impulse buying, i.e. the third sub-objective of this thesis.

5.3 Shopping list usage and impulse buying

All in all, 39% of the respondents had a shopping list whilst they were at a grocery shop the last time. Having a shopping list was a bit more common among women (41%) than men (37%). Having a shopping list is especially popular among 65–74 year olds (51%), as can be seen from the following Figure 16.

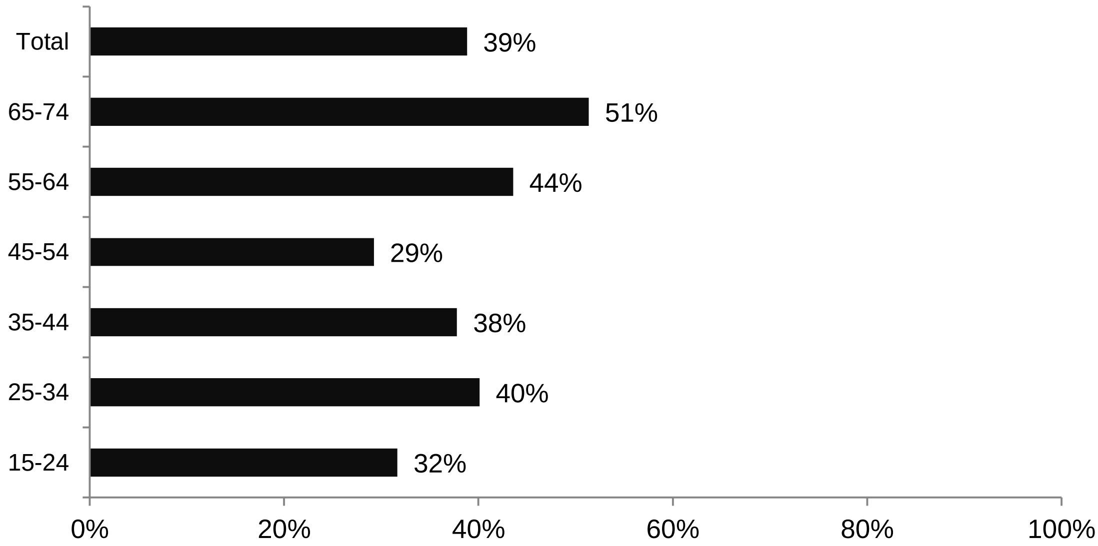

Figure 16 The usage of shopping lists in different age groups

The shopping list usage is clearly below the average among single households where only 31% stated having used a shopping list at the grocery store. The usage of a shopping list is highest among households with 4 persons (49%). The respondents were also asked how specifically they usually write the shopping list. It seems that most of the lists contain only the items on a general level, and very seldom the lists are written on a brand level. This means that the consumer may make the final decision concerning pre-planned product categories at the point-of-sale which makes it possible to affect the purchase decisions still at the grocery store with for example in-store advertising.

Having a shopping list makes shopping faster and it eases the grocery shopping especially among families when there are many items to remember. However, the extent to which the shopping list is followed, and if additional items are bought despite the shopping list is of special interest because it provides marketers with useful insights on how to engage consumers to impulse buying. The following Figure 17 represents the extent to which the shopping list is followed among those respondents who used a shopping list.

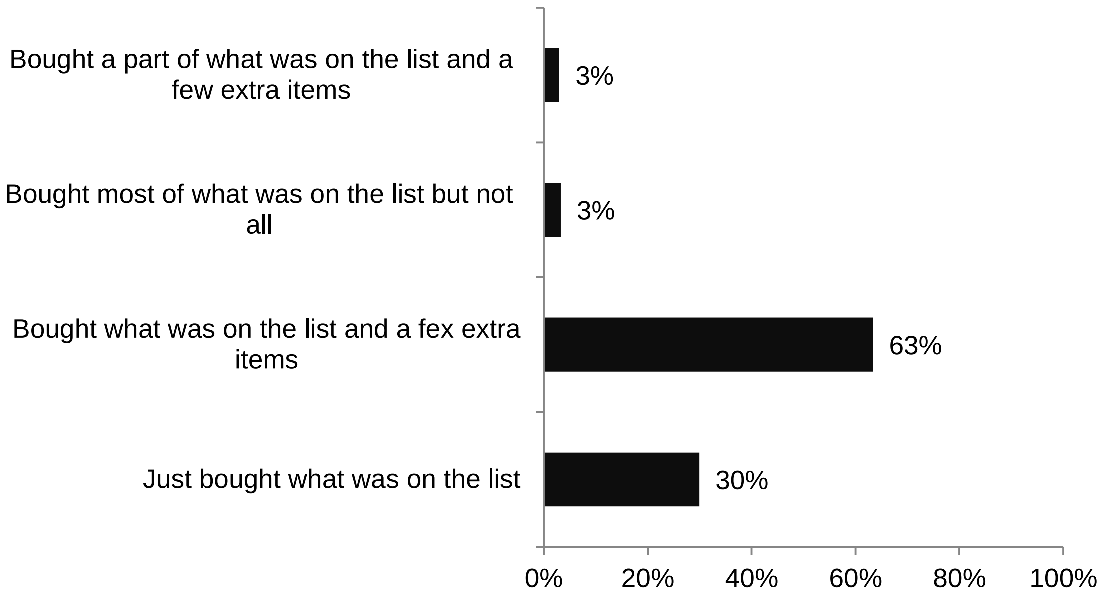

Figure 17 Following the shopping list

As can be seen from the Figure 17, two thirds of the shopping list users ended up buying also something else than what was on the list. Approximately a third of the list users stack with the contents of the list only. Buying additional items despite the shopping list was a bit more common among women than men. Especially 45–54 year old women bought extra items while also buying everything they had written on the shopping list (78%). On the other hand among 45–54 year old men the share of those following only the shopping list was relatively high: 43%. When compared to the findings of Block and Morwitz, the results from this study give a bit higher share of the shopping list followers. When they found out that 80% of those who had a shopping list bought everything that had been written on the list, the corresponding number in this study is as high as 93%. In their study 66% of those who had a shopping list also bought something else, and the share is the same in this study. As Block and Morwitz found out, the probability of purchasing an item given a shopping list was used for the product seems to be greater the larger the household size, greater for younger and older heads of households and greater when bigger shopping baskets are bought than only fill-in trips. These all were true also in this study. Next, the subject of impulse buying is discussed in greater detail.

All in all fourth of the respondents had bought a new or a different item when compared to regular shopping behaviour. Trying something new was more common among women than men. Especially 25–34 year old women engage in trying new products (32%) more commonly than the average. This is something that can benefit the marketers and helps in planning the kind of advertising that entices especially this target group. The most influencing channels affecting the consumers while purchasing something different are mainly focused on the point-of-sale activities and discounts in general. Impulse shopping happens quite often also when there is some kind of a special event taking place (parties and get-togethers with friends, for example). Of the bought media direct marketing and newspaper advertising are the most influential channels (see Figure 18).

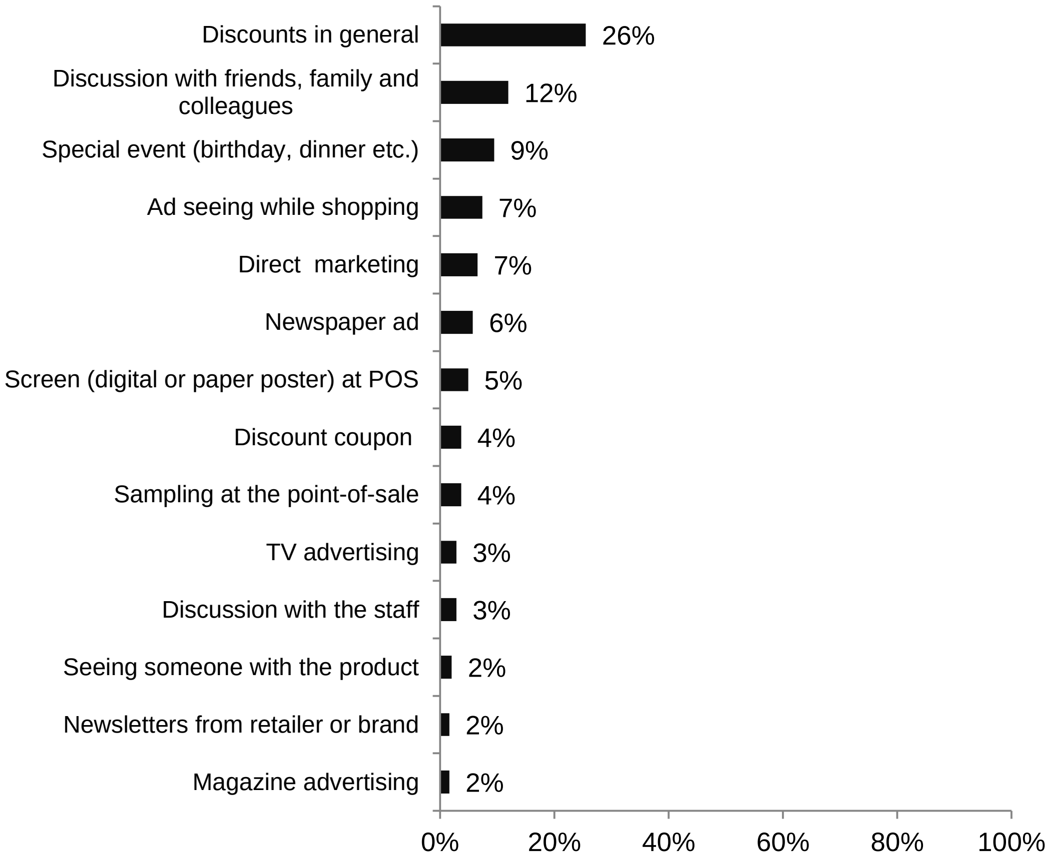

Figure 18 The role of media in selecting new products

Discussions with friends, family and colleagues as well as samplings influence women to buy a new product more commonly than men. Among men, screens at the point-of-sale had bigger influence than among women. Of the factors influencing impulse buying categorized by Muruganantham and Bhakat especially external stimuli (the bought, owned and earned media, store characteristics and point-of-sale effects among other things) and demographic factors can be supported based on this survey data. Next two sub-chapters focus on the main objective of this thesis, that is the roles of bought, owned and earned media in affecting the choice of grocery store.

5.4 Reasons for choosing the most visited grocery store

This sub-chapter focuses on the factors affecting the decision concerning the most visited grocery store. The respondents were asked to rate the importance of various factors using a scale of 1–5, where 1 indicated the factor not being at all important and 5 then again meaning it being highly important. The following Figure 19 represents the sum of percentages of ratings 4 and 5, that is, the importance of different factors on the main grocery store choice.

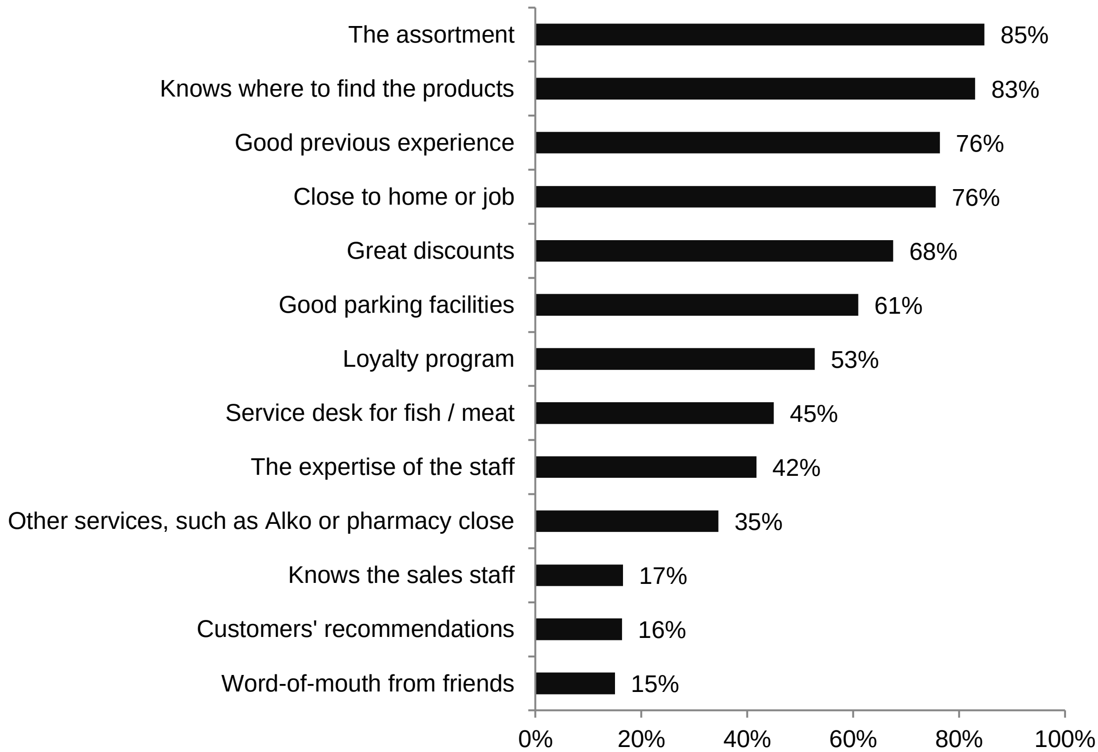

Figure 19 Factors influencing the choice of the preferred store

As can be seen from the Figure 19 above, the stores' product selection and the familiarity with the store are the main factors driving Finnish consumers to a specific grocery store. The location of the store, either close to home or close to work is also a critical factor influencing the decision-making concerning the grocery store. Discounts are also a driving factor, but interestingly enough the loyalty program as such is not as driving a factor as one could think giving the fact that 98% of the respondents belonged to some loyalty program (S-Etukortti / Plussa / Stockmann or Ykkösbonus). Word-of-mouth or other customers' recommendations do not have a significant effect on choosing the most visited store; it can be emphasized more as being habitual shopping where promotions do not have as significant a role as one could have assumed. When compared to the list provided by Wahl, this study supports the findings related especially to good produce department, low prices, convenient store location, and shelves usually kept well-stocked. The following sub-chapter discusses the various elements affecting the customers when they are visiting a grocery store that is different from the one they normally go to.

5.5 Reasons for choosing a different grocery store

The roles of bought, owned and earned media affecting consumers while choosing a different store than normally are highlighted in this sub-chapter. This is the sub-chapter where two of Kotler's 4Ps, namely price as well as promotion are taken a closer look at. In this context price means the amount of money that is charged for the grocery items. When talking about groceries and shopping in a different store than normally, the concept of price is clearly seen as a competitive advantage when it is communicated as discounts and offers for the consumers.

In this context, the promotion of Kotler's 4Ps means any paid form of non-personal promotion of goods: sales promotion, public relations, personal selling, or direct marketing. Each of these involves specific promotional tools that are used to communicate with consumers. The advertising is dealt into bought, owned and earned media. Bought media contain all media that can be paid by the company. Owned media are the media type that the company owns and can mostly control. Earned media is the kind of media that the company with the help of its products earns in some way.

The significance of different media was again measured on a scale of 1–5, where 1 indicated the factor not being at all significant and 5 meaning it being highly significant. The Figure 20 shows the sum of percentages of ratings 4 and 5, that is, the significance of different factors on choosing other store than the most often visited one.

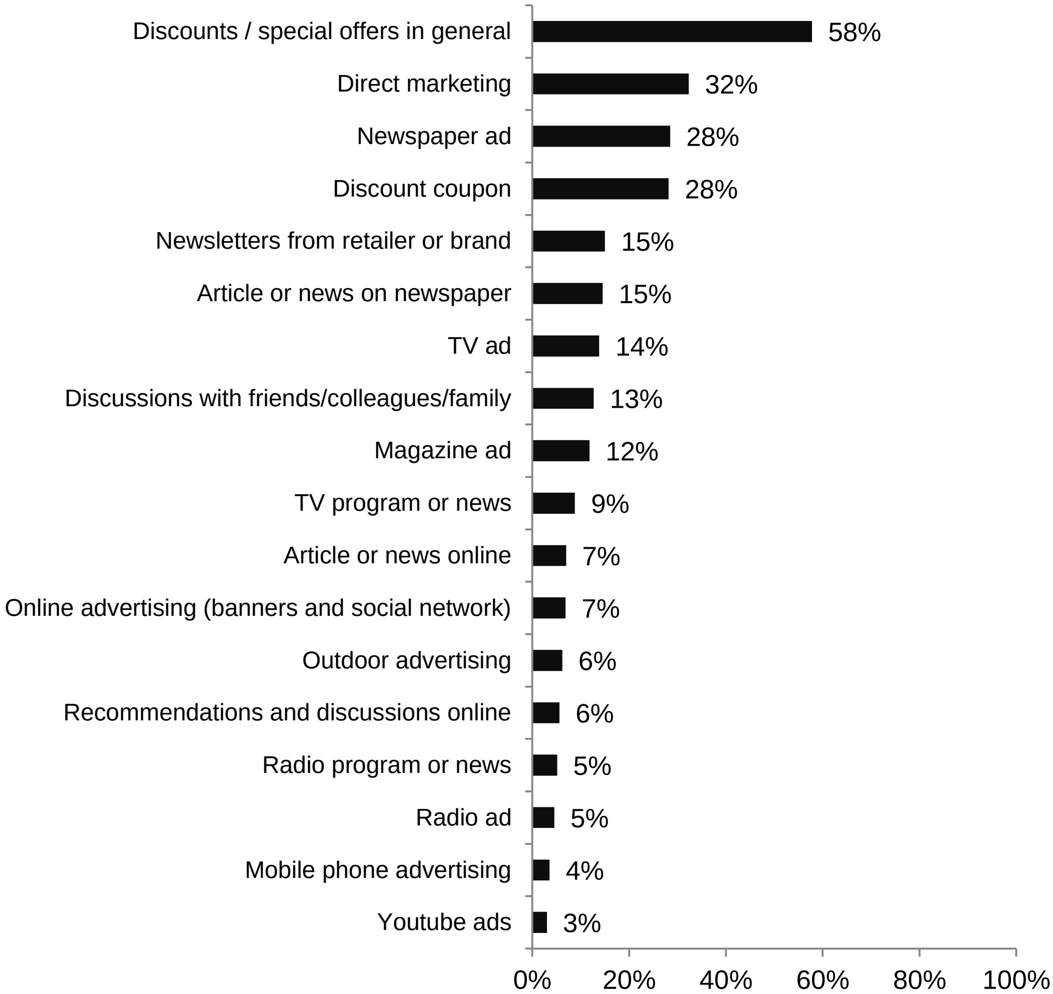

Figure 20 Factors influencing the choice of a different store

As can be seen from the Figure 20, the most driving factors to different stores are clearly discounts and offers in general. The catalogues and other marketing material delivered by post are also very effective in driving traffic to a different grocery store. Of the bought media especially newspaper adverts are an effective means of getting consumers to choose another grocery store than the one they normally visit. Television advertising also influences, but clearly not as much as newspaper advertising. Finland is still the world´s leading country in magazine reading, and the third in newspaper business: there are more magazines per capita than anywhere else in the world – approximately 4500 magazine titles and nearly 200 newspapers.

Discount coupons both from print and mobile have also an important role in making the consumers choose another grocery store than normally. Of the so-called traditional bought media, radio advertising does not manage to entice consumers into visiting a different store. In addition, mobile phone and YouTube advertising do not yet perform well when the scope is in the total population. Own media in the form of newsletter advertising performs relatively well: 15% of the respondents said that newsletters had at least a somewhat significant role when they last time visited a different store. Earned media, such as discussions a consumer has with friends, have an important role as well in consumers choosing a different store. However, recommendations by strangers online do not have as strong an effect. All in all, approximately two-thirds of the visits to a new or a different store take place on weekdays (Monday to Thursday), and a third on weekends (Friday to Sunday). The most important media-related motives for visiting a different store on weekdays vs. the weekend are presented on the following Table 4.

Table 4 The effect of media on weekdays and weekends

	Weekday	Weekend	Total
Discounts / special offers in general	59%	60%	58%
Direct marketing	32%	36%	32%
Newspaper ad	28%	33%	28%
Discount coupon	29%	30%	28%
Newsletters from retailer or brand	15%	17%	15%
Article or news on newspaper	14%	17%	15%
TV ad	14%	16%	14%
Discussions with friends/ colleagues/family	13%	14%	13%
Magazine ad	12%	13%	12%

Based on the data presented on the Table 4, advertising affects Finnish consumers' grocery shopping somewhat more on weekends when compared to the weekday shopping. Given the fact that also basket sizes typically vary on weekends versus weekdays, this finding gives valuable information about the importance and the role of marketing of groceries.

When the significance of different media is compared between age groups, the effect of print leading to a different store decreases significantly the younger the consumer is (see the following Figure 21).

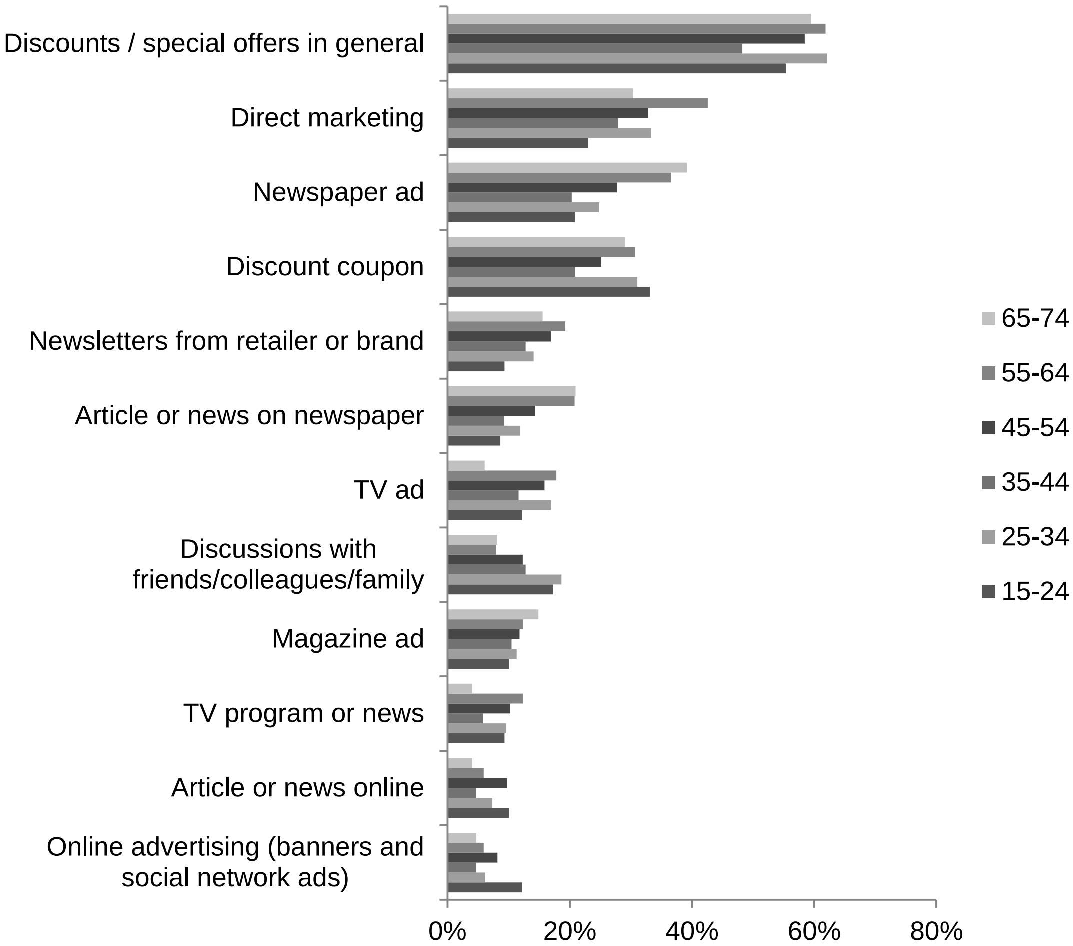

Figure 21 The effects of media between age groups

The significance of traditional bought media and especially print advertising in making consumers choose a different grocery store is highest among 55–74 year olds. Direct marketing also works better among older age groups. Discount coupons work well in both younger (15–34 year olds) as well as older (55–74 year olds) age groups. Perhaps the type of a coupon that is used is different, though, as this question grouped both print and mobile discount coupons under the same option. Among 15–24 year old respondents, traditional bought media underperform when compared to the total population. However, especially online advertising (excluding newsletters) and word-of-mouth are important drivers when young consumers try new or different grocery stores. Out-of-home advertising works also better than the average among this age group. Among 25–34 year old respondents the effect of word-of-mouth is even higher. Perhaps a bit surprisingly this target group states that television advertising has led them to try a different store more commonly than the average. This is an interesting finding as the consumers belonging to this age group do not watch the linear television as much as the average. This finding indicates that the usage of online television services such as Katsomo and Ruutu, and advertising in those services do indeed capture the interest among this target group, and creates call-to-actions.

Interestingly enough, the significance of different media affecting the choice of a new or a different store clearly drops in all media options among 35–44 year olds when compared to the average. This is most probably due to this age group often having families, and the busy and hectic life does not make it possible to clearly compare all the options.

6 Discussion and ideas for further research

The data that was gathered for this thesis has given interesting findings on the roles of the media in enticing Finnish consumers into different grocery stores. The main research objective of this thesis was to evaluate the importance of various factors, and especially bought, owned and earned media on the choice of grocery store (preferred and a different store than normally). Based on the data it seems that the visits to the most preferred store are based on habitual shopping, that is, the grocery store is visited based on good product selection, previous experience, familiarity with the store all in all, and because of the location. Discounts were also important but the significance was clearly smaller than that of the abovementioned factors. Based on the data the Finnish grocery shoppers might change the preferred grocery store when they move: the location either close to home or the work place was considered as important by 76% of the respondents. One could assume that the new preferred store belongs to the same store chain (S or K). If the consumer moves to a new home, and he or she belongs to a loyalty program, direct marketing could be used in order to help the consumer find a new grocery store close to home.

However, consumers visit also different grocery stores than the one they most often visit. In this case, the media has an important role in getting consumers visit a store. Discounts in general are affecting consumers to choose a different store than normally. Based on the data, bought media has clearly the most significant role in driving traffic to a different store. Both direct marketing and newspaper advertising work well among the total population. This implies that the decision concerning the grocery store is made within a short notice: the daily newspaper can affect the grocery store choice. Television advertising does not affect so much which supports the finding mentioned above. The planning for grocery shopping begins in the morning while reading newspapers. This explains the huge share of grocery store advertising especially on Thursdays and Fridays when the consumers are planning their purchases for the weekend. Own media in the form of newsletters from the retailer affect especially the older consumers. Targeting consumers with relevant content can raise the interest of visiting a store. K-Supermarket Kamppi in Helsinki does this quite efficiently already: the marketing is targeted to the K-Plussa card owners based on their previous purchase behaviour. The discounts all in all are important especially for younger respondents.

Mobile advertising and innovative marketing solutions entice the younger consumers into visiting a new store. All in all approximately every tenth respondent had used their mobile phone for finding information, such as recipes online when shopping for groceries. Among 15–34 year olds the share was clearly higher: approximately a fourth of this age group had used a mobile phone for finding out information online. This could provide grocery stores with ideas how to connect for example the recipes of the S chain loyalty program magazine Yhteishyvä and that of the K chain Pirkka to the point-of-sale more closely, and how the customers could benefit from that content with their mobile phones whilst shopping for groceries. The S chain has already started a co-operation with Foodie.fm which is a personalised eCommerce platform that provides tools needed to run grocery operations in a multichannel environment. It makes online shopping possible as well as creates shopping lists based on recipes in Yhteishyvä. It even arranges the items on shopping lists in the correct order based on how the items are located on a specific store’s shelves. Discount coupons are more and more often being sent to the mobile phone, either as a text message or as a newsletter that can be shown at the cashier. Approximately every tenth had used a discount coupon from their mobile phones.

While Instagram is becoming more and more popular especially among the youth, posting photos about groceries is something that the consumers might do every now and then. Based on the data taking photos of groceries is most common among 25–34 year olds. Grocery chains and marketing agencies could thus think how to connect a specific store more closely to Instagram. How could consumers benefit if they post photos of grocery purchases or food photos of the ingredients they have bought from a specific store to Instagram? What kind of a competition around a specific theme with relevant hashtags could be interesting to younger consumers? People do talk about their grocery shopping. Earned media had also a significant role in leading consumers to different stores. Especially discussions with friends and family are effective means of word-of-mouth. If still thinking about an Instagram campaign, it could create buzz in social media, and give ideas about which groceries to buy and what to cook.

The first sub-objective of this thesis was to describe grocery shopping frequency among other background information related to Finnish grocery shopping behaviour. It seems that most of the Finnish consumers' grocery shopping is done typically 2–3 times a week. Daily grocery store visits take place in bigger cities more common than the average. This is an interesting finding and may provide marketers with ideas on how to get these people come to grocery stores more often via Instagram competitions, for example. The preference of the S chain grocery stores is very high among the total population. However, the share of Lidl among the preferred stores is relatively high as well (14%), and based on some latest news the share will keep on growing in the future. The most considered grocery stores are S-market, Prisma, Lidl, and K-Citymarket with each having total consideration rates above 70%. The shares vary significantly between different areas: for example the consideration for K-Citymarket of the grocery stores that are visited at least sometimes is above average in Varsinais-Suomi whereas the share of K-Supermarket is clearly higher in Pirkanmaa. This naturally brings about the differences in the shares of different stores in different areas. It was also seen that bigger cities still have smaller privately owned shops but all in all 80% of the grocery market is controlled by the S and the K chains.

The shopping companion and the decision-maker concerning the grocery store choice were discussed as the second sub-objective of this thesis. An interesting finding was that women are responsible for the store selection more typically than men (89% versus 76%, respectively). This implies that women are an important target group when planning the advertising message and the creative. Analysing the usage of shopping lists and impulse buying as a phenomenon were the third sub-objective of this thesis. All in all 40% of the Finnish use shopping list while shopping for groceries. A significant finding from the study was that despite the shopping list, impulse buying does occur. Two thirds of shopping list users ended up buying also something else than what was on the list, and impulse buying was a bit more common among women than men. When talking about trying new products, especially 25–34 year old women engage in new product trial more than average. Despite the shopping list being used, impulse buying and new product trial can be enticed with effective point-of-sale activities. Word-of-mouth from friends and samplings affect women to try something new more commonly than men. When discussing above the chances brought about by social networks in pursuing the consumers to try a different store, the role could be important also in enticing consumers into new product trial.

All in all it seems that Finnish consumers are habitual grocery shoppers and they like to follow routines. When something new or different is tried, discounts have a huge effect. A different store is visited if the advertising especially in print has been tempting. Back in the 1980s it was very common to buy coffee from one store, and margarine from another, and it seems that this discount affinity is still very rooted in Finnish consumers' minds. Ideas for further research around this theme could be to find out what the specific products driving consumers to a different store are, and which products work better on weekdays versus weekends as there most probably are differences.

The usage of shopping lists is quite common, and it was interesting to notice that most of the products written on shopping lists are on a general level and very seldom on a brand level. Being the top-of-mind brand in a category in consumers' minds certainly affects the decision while the consumer is at the grocery store selecting the product from the shelves, but as the decision in the end is made at the store the point-of-sale activities can change the pre-planned choice into something else within the brand consideration list. An interesting idea would be to study consumers with an ethnographic research method by observing their daily lives, ask about the advertising they have seen, and go with them to the grocery store and follow their behaviour there. In addition, when discussing the factors affecting new product trial, it would be interesting to divide the different categories and analyse if the affecting factors are different, say, within beef or yoghurt categories. Also, the motives affecting new product trial on weekdays compared to weekends are something that could be studied in further research.

An interesting finding from this thesis was especially the high preference rate of Lidl stores. According to the latest news, Lidl has been taken more and more into account when new locations for Alko premises have been planned. This might accelerate the growth of the market share for Lidl, and it remains to be seen to what extent it can compete with the S and the K chains, and whether there could be space on the Finnish grocery market for other big European chains, for example the REWE group.

References

Abratt, Russel and Goodey Stephen D. 1990. Unplanned buying and in-store stimuli in supermarkets. Managerial and Decision Economics, Vol. 11, 111–121.

Alasuutari, Pertti 1993. Laadullinen tutkimus. Tampere: Vastapaino.

Blackshaw, Pete 2010. Media mix modeling 2.0: The fine art of blending and mixing paid and earned media to build brands. ARF Experiential Learning. Re: Think conference, 2–14.

Block, Lauren G. and Morwitz Vicki G. 1999. Shopping lists as an external memory aid for grocery shopping: Influences on list writing and list fulfillment. Journal of Consumer Psychology, 343–375.

Briesch, Richard A., Chintagunta Pradeep K. and Fox Edward J. 2009. How does the assortment affect grocery store choice? Journal of Marketing Research, Vol. XLVI (April 2009), 176–189.

Cinjarevic, Merima, Tatic Kasim and Petric Srdan 2011. See it, like it, buy it. Hedonic shopping motivations and impulse buying. Economic Review – Journal of Economics and Business, June 2011, vol. IX, Issue 1, 3–15.

Eskola, Jari and Suoranta Juha 1998. Johdatus kvalitatiiviseen tutkimukseen. Jyväskylä: Gummerus Oy.

Ettenson, Richard, Conrado Eduardo and Knowles Jonathan. Rethinking the 4P's - Harvard Business Review, January–February, 26.

Ewing, Michael, Napoli Julie and Du Plessis Erik 1999. Factors affecting in-market recall of food product advertising. Journal of Advertising Research, Vol 39, No. 4, 29–38.

Felgate, Melanie, Fearne Andrew, DiFalco Salvatore and Martinez Marian Garcia 2012. Using supermarket loyalty card data to analyse the impact of promotions. International Journal of Market Research, Vol. 54, No. 2, 221–240.

Goi, Chai Lee 2009. A Review of marketing mix. International Journal of Marketing Studies, Vol. 1, No. 1, 1–14.

Gray, Christopher 2013. The future of shopper marketing: The psychology of shopping. Admap. October 2013.

Gültekin, Beyza and Özer Leyla 2012. The influence of hedonic motives and browsing on impulse buying. Journal of Economics and Behavioural Studies, Vol. 4, No. 3, 180–189.

Harrison, Frank 2013. Digging deeper into the empirical generalization of brand recall: Adding owned and earned media to paid-media touchpoints. Journal of Advertising Research, Vol. 53 Issue 2, 181–185.

Inman, Jeffrey J., Winer Russell S. and Ferraro Rosellina 2009. The interplay among category characteristics, customer characteristics, and customer activities on in-store decision making. Journal of Marketing, Vol. 73, 19–29.

Ittersum van, Koert, Wansink Brian, Pennings Joost M.E and Sheehan Daniel 2013. Smart shopping carts: How real-time feedback influences spending. Journal of Marketing Vol. 77, 21–36.

Jensen, Klaus Bruhn (edited) 2002. A handbook of media and communication research. Qualitative and Quantitative methodologies. Routledge.

Koistinen, Katri and Järvinen Raija 2009. Consumer observations on channel choices – Competitive strategies in Finnish grocery retailing. Journal of Retailing and Consumer Services, Vol. 16, 260–270.

Kollat, David T. and Willet Ronald P. 1967. Customer impulse purchasing behaviour. Journal of Marketing Research, Vol.IV, 21–31.

Kotler, Philip and Armstrong Gary 2010. Principles of Marketing. Thirteenth edition. Pearson.

Kotler, Philip, Armstrong Gary, Wong Veronica and Saunders John. 2008. Principles of Marketing. Fifth European Edition. Prentice Hall.

Meyer-Waarden, Lars and Benavent Christophe 2009. Grocery retail loyalty program effects: self-selection or purchase behaviour change? Journal of the Academic Marketing Science, Vol. 37, 345–358.

Muruganantham G. and Shankar Bhakat Ravi. A review of impulse buying behaviour. International Journal of Marketing Studies, Vol. 5, No. 3, 149–160.

Muzondo, Noel and Mutandwa Edward. 2011. The seven Ps of marketing and choice of main grocery store in a hyperinflatory economy. Contemporary Marketing Review, Vol. 1(9), 1–18.

Powers, Todd, Advincula Dorothy, Austin Manila S. and Graiko Stacy 2012. Digital and social media in the purchase-decision process: A special report from the Advertising Research Foundation. Journal of Advertising Research, Vol. 52, No. 4, 479–489.

Schultz, Don and Block Martin 2009. Shopper's own views of in-store activities. ESOMAR Retail and shopper, London, March 2009.

Taylor, Jennifer, Kennedy Rachel, McDonald Colin, Larguinat Laurent, El Quarzazi Yassine and Haddad Nassim 2013. Is the multi-platform whole more powerful than its separate parts? Measuring the sales effects of cross-media advertising. Journal of Advertising Research, Vol. 53, No. 2, 200–211.

Yin, Robert K. 1984. Case study research. Design and methods. Sage Publications: Beverly Hills.

Vroegrijk, Mark, Gijsbrechts Els and Campo Katia 2013. Close encounter with the hard discounter: A multiple-store shopping perspective on the impact of local hard-discounter entry. Journal of Marketing Research, Vol. 50, No 5, 606–626.

Wahl, Michael. 1992. In-Store Marketing – A new dimension in the share wars. Sawyer Publishing.

Appendix 1: Questionnaire (in Finnish)

Perustaustat Norstatilta

sukupuoli, ikä, koulutustaso, työtilanne, lasten määrä ja iät, tulot, postinumero

TARKISTUSKYSYMYS KOHDERYHMÄÄN KUULUMISESTA:
Kuinka usein olet vastuussa kotitaloutesi ruokaostoksista?
Kokonaan
Melkein kokonaan
Noin puolet ajasta
Alle puolet ajasta
En koskaan -> ohjataan ulos lomakkeelta.

Q1. Miten usein yleensä käyt ruokakaupassa?
Päivittäin tai lähes päivittäin
2-3 kertaa viikossa
Kerran viikossa
2-3 kertaa kuukaudessa
Harvemmin

Q2. Miten paljon yleensä kulutat rahaa elintarvikkeisiin päivittäistavarakaupoissa viikoittain? Anna ainakin arvio. Anna vastaus euroihin pyöristettynä.
AVOIN, TÄYTYY OLLA NUMEERINEN VASTAUS EUROISSA (ei senttejä)

Q3. Missä kaupassa <u>yleensä</u> käyt ruokaostoksilla? Valitse useimmin käyttämäsi kauppa. SINGLE, ROTATOI VAIHTOEHDOT
Alepa
Euromarket
Halpa-Halli
Kauppahalli
K-citymarket
K-extra
K-market
K-supermarket
Lidl
Minimani
M-market
Prisma
R-kioski
Robin Hood
Sale
Siwa
S-market
Stockmann
Tokmanni
Valintatalo
ABC
Muu lähikauppa
Muu huoltoaseman kauppa

Q4. Entä missä muissa ruokakaupoissa käyt ainakin silloin tällöin?
MULTI, ÄLÄ NÄYTÄ SITÄ, JONKA EDELLISESSÄ VALITSI
Alepa
Euromarket
Halpa-Halli
Kauppahalli
K-citymarket
K-extra
K-market
K-supermarket
Lidl
Minimani
M-market
Prisma
R-kioski
Robin Hood
Sale
Siwa
S-market
Stockmann
Tokmanni
Valintatalo
ABC
Muu lähikauppa
Muu huoltoaseman kauppa
Muu, mikä_________

Q5. Kun mietit useimmin käyttämääsi ruokakauppaa, miten tärkeitä seuraavat tekijät ovat? (1=ei lainkaan tärkeä – 5=erittäin tärkeä ja EOS)
Kauppa lähellä kotia tai työpaikkaa
Sijainti matkan varrella
Kanta-asiakasohjelma / kanta-asiakaskortti
Hyvät tarjoukset ja promootiot
Henkilökunnan asiantuntemus
Asiakkaiden arviot ja arvostelut
Tuttu myyjä
Aikaisemmat hyvät kokemukset
Ystävän / perheenjäsenen / kollegan suositukset kaupasta
Valikoimassa tiettyjä tarvitsemiani tuotteita
Hyvät pysäköintimahdollisuudet
Nopea asiointi täydennysostoksia varten
Tuttu kauppa, tiedän mistä löydän mitäkin
Monipuolinen valikoima
Palvelutiski kaloille/lihalle
Muut palvelut lähellä, esim. apteekki ja Alko
Muu, mikä

Q6. Kun ajattelet päivittäistavaroiden ostamista ylipäätään, missä määrin olet samaa tai eri mieltä seuraavien väittämien kanssa?
ASTEIKKO: Täysin eri mieltä (1) – Täysin samaa mieltä (5), EOS
Ostan/kokeilen usein uusia tuotteita ja eri brändejä
Yleensä juttelen ystävieni / perheenjäsenieni kanssa päivittäistavaratuotteista
Ystäväni / perheenjäseneni kysyvät minulta usein vinkkejä tai suosituksia
Yleensä valitsen tuotteen tietyistä suosikkibrändeistäni

Olen kotitalouteni osalta pääosin vastuussa päivittäistavaroiden ostamisesta
Teen yleensä nopeita päätöksiä ostoksia tehdessäni ilman, että käyttäisin paljon aikaa löytääkseni juuri täydellisen tuotteen
Mainonta kaupassa (esimerkiksi hyllymainokset, mainokset ostoskoreissa ja kärryissä) vaikuttaa usein tuotevalintoihini ja ostopäätöksiini
Videot tai kuulutukset kaupassa vaikuttavat usein tuotevalintoihini ja ostopäätöksiini
Kaupan promootiot / näytöt vaikuttavat usein tuotevalintoihini ja ostopäätöksiini
Myymälän sisällä jaetut lehdykät vaikuttavat usein tuotevalintoihini ja ostopäätöksiini
Näytteet tai tuotemaistatukset herättävät ostokiinnostuksen

Q7. Mieti tilannetta, jossa kävit viimeksi eri kaupassa kuin missä yleensä/useimmin käyt. Arvioi seuraavien näkemiesi ja kuulemiesi asioiden vaikutusta päätökseesi valita juuri kyseinen kauppa. (1=ei lainkaan vaikutusta – 5=merkittävä vaikutus, EOS) ROTATOI
TV-mainos
Radio-mainos
Mainos aikakauslehdessä
Mainos sanomalehdessä
Internet-mainonta (esimerkiksi bannerit tai mainonta sosiaalisissa verkostoissa)
Internet-videomainokset (esimerkiksi YouTubessa)
Ulkomainonta (bussikatokset, ratikat, juna-asemat, lentokentät jne.)
Mainos matkapuhelimessa
Alennukset / tarjoukset ylipäätään
Sähköinen uutiskirje, jonka sain jälleenmyyjältä / marketista / tuotemerkiltä
Katalogit tai mainospostit jotka sain postitse
Tarjouskuponki (paperinen tai mobiili)
TV-ohjelma tai uutinen
Artikkeli tai uutinen internetissä
Kuluttajien arvostelut internetissä
Radio-ohjelma tai uutinen
Artikkeli tai uutinen sanomalehdessä
Keskustelu ystävien/ tuttavien kanssa
Muu, mikä?

ÄLÄ NÄYTÄ, JOS VASTANNUT Q7 ”SUOSIN AINA SAMAA KAUPPAA”
Q8. Mikä viikonpäivä oli kyseessä, kun kävit viimeksi eri kaupassa kuin missä yleensä/useimmin käyt?
Arki (maanantai-torstai)
Viikonloppu (perjantai-sunnuntai)
En muista

ÄLÄ NÄYTÄ, JOS VASTANNUT Q7 ”SUOSIN AINA SAMAA KAUPPAA”
Q9. Kenen kanssa olit kaupassa, kun kävit viimeksi eri kaupassa kuin missä yleensä/useimmin käyt? SINGLE
Yksin
Puolisoni kanssa
Lapsen / lasten kanssa
Puolisoni ja lasten kanssa
Ystävän kanssa
Jonkun muun kanssa
En muista

ÄLÄ NÄYTÄ, JOS VASTANNUT Q7 ”SUOSIN AINA SAMAA KAUPPAA”
Q10. Entä kuka tuolloin teki lopullisen päätöksen kyseisen kaupan valinnasta? SINGLE
Minä itse
Puolisoni
Lapseni
Puolisoni ja lapseni
Ystäväni
Joku muu
En muista

Q11. Milloin kävit <u>viimeksi</u> ruokaostoksilla?
tänään
eilen
2-3 päivää sitten
4-7 päivää sitten
viime käynnistä on kulunut viikko tai sitä pidempi aika

Q12. Kun <u>viimeksi</u> kävit ruokaostoksilla, kuinka monta tuotetta ostit kerralla? Valitse sopivin alla olevista vaihtoehdoista. SINGLE
1 tuote
2-5 tuotetta
6-10 tuotetta
11-20 tuotetta
21-30 tuotetta
31-40 tuotetta
40-50 tuotetta
yli 50 tuotetta
En osaa sanoa

Q13. Kun <u>viimeksi</u> kävit ruokaostoksilla, ostitko mitään, mikä oli uusi tai eri tuote verrattuna yleisimmin ostamiisi tuotteisiin? SINGLE
Kyllä, mitä?________________
En
En osaa sanoa

JOS Q13=1 (JOS OSTI UUDEN TUOTTEEN)
Q14. Mikä seuraavista vaikutti päätökseesi ostaa tuote/tuotteet, jotka olivat uusia tai eri tuotteita verrattuna siihen, mitä yleensä ostat? MULTI & ROTATOI
TV-mainos
Radio-mainos
Mainos aikakauslehdessä
Mainos sanomalehdessä
Internet-mainonta (esimerkiksi bannerit tai mainonta sosiaalisissa verkostoissa)
Internet-videomainokset (esimerkiksi YouTubessa)
Ulkomainonta (bussikatokset, ratikat, juna-asemat, lentokentät jne.)
Mainos matkapuhelimessa
Alennukset / tarjoukset ylipäätään
Sähköinen uutiskirje, jonka sain jälleenmyyjältä / marketista / tuotemerkiltä
Kyltti tai sähköinen näyttö, jonka näin ostoksia tehdessäni
Mainos jonka näin ostoksia tehdessäni
Myymälän henkilökunnan kanssa keskustelu
Näytteet tai tuotemaistatukset
Myymälän kupongit

Myymälän sisällä jaetut lehdykät
Katalogit tai mainospostit jotka sain postitse
Tarjouskuponki (paperinen tai mobiili)
TV-ohjelma tai uutinen
Artikkeli tai uutinen internetissä
Kuluttajien arvostelut internetissä
Radio-ohjelma tai uutinen
Artikkeli tai uutinen sanomalehdessä
Keskustelu ystävien/ tuttavien kanssa
Jonkun näkeminen tuotemerkin kanssa
Kuuluisuuksien suosittelut
Minua houkutteli ostamaan tietty tilaisuus (synttärit, illalliset jne.)
Muu, mikä?
Mikään ei tule mieleeni

Q15. Oliko sinulla ostoslista käytössä, kun kävit viimeksi ruokaostoksilla? SINGLE
Kyllä
Ei

ONLY ASK IF Q15=1 (Kyllä)
Q16. Miten täsmällisesti noudatit ostoslistaa? SINGLE
Ostin vain ne asiat, jotka olivat listalla
Ostin listalla olevat tuotteet sekä muutaman ylimääräisen tuotteen
Ostin suurimman osan listalta, mutten kaikkea, mitä listalla oli
Ostin vain osan listan tuotteista ja muutaman ylimääräisen tuotteen
En osaa sanoa

ONLY ASK IF Q15=1 (Kyllä)
Q17. Miten tarkasti yleensä kirjoitat ostoslistan? Mitä kirjoitat listaan yleisellä tasolla (maitoa, hedelmiä, makkaraa jne.) ja mitä kirjoitat bränditasolla (Sininen lenkki, Fazerin maitosuklaalevy jne.). Kerro esimerkkejä. AVOIN

Q18. Oletko lähiaikoina käyttänyt <u>ruokaostoksia tehdessäsi</u> kännykkääsi mihinkään näistä? Voit valita kaikki, jotka sopivat. MULTI
…ottaaksesi kuvia tuotteesta
...hakeaksesi tietoa, kuten reseptejä internetistä
…vertaillaksesi hintoja
…lähettääksesi sähköpostia tai chat-viestin jollekin ostoksestasi
...julkaistaksesi kommentin sosiaalisen verkostoon ostoksestasi tai ostokokemuksestasi
…käyttääksesi alennuskupongin jonka olit tallettanut puhelimeesi
En ole koskaan käyttänyt kännykkääni yllämainittuihin aktiviteetteihin tehdessäni ruokaostoksia

Q19. Mihin kanta-asiakasohjelmiin kuulut tai mitä kanta-asiakaskortteja on käytössäsi? MULTI
SOK/ S-Etukortti
K-Plussa
Stockmann
Lähikauppa/Ykkösbonus
Joku muu, mikä______________
Ei minkään yllä olevista

Q20. Miten houkuttelevilta seuraavat palvelut vaikuttavat mielestäsi? SKAALA: EI LAINKAAN HOUKUTTELEVA (1) – ERITTÄIN HOUKUTTELEVA (5), EOS
Palvelu, joka löytää kauppojen alennukset omalta lähialueeltasi
Palvelu, jonka avulla voit paikallistaa tietyt tuotteet ja brändit omalta lähialueeltasi
Palvelu, joka lähettää puhelimeesi alennuskuponkeja, jotka voit hyödyntää lähikaupassasi
Palvelu, jonka avulla voit vertailla tuotteiden hintoja oman lähialueesi kaupoissa

Q21. Oletko koskaan ostanut elintarvikkeita netistä? SINGLE
Kyllä, ostan usein
Kyllä, silloin tällöin
Olen kokeillut sellaista palvelua
Olen harkinnut, mutta en ole vielä kokeillut
En ole edes harkinnut palvelun käyttöä
En tiennyt, että elintarvikkeita voi ostaa netistä
En osaa sanoa

Jos on ostanut (Q21=1-3)
Q22. Mitä palvelua / palveluja olet käyttänyt? AVOIN

Jos on ostanut (Q21=1-3)
Q23. Miten palvelu mielestäsi toimi? AVOIN

Jos ei ole ostanut (Q21=4-5)
Q24. Miksi et ole vielä kokeillut elintarvikkeiden ostamista netissä? AVOIN

Q25. Miten samaa tai eri mieltä olet seuraavista väittämistä koskien päivittäistavaroita? TÄYSIN ERI MIELTÄ (1) – TÄYSIN SAMAA MIELTÄ (5), EOS
Kun löydän tuotemerkin josta pidän, pysyn usein sille uskollisena
Ihmiset kysyvät minulta usein neuvoa ostoksiinsa
Mikäli tarjolla on kaupan merkki ja merkkituote, valitsen yleensä kaupan merkin tuotteen.
Haluaisin toisten hyväksyvän tuotemerkit, joita ostan
Kun teen ostoksia, katson useita eri vaihtoehtoja saadakseni parhaan vastineen rahalleni
Seuraan aktiivisesti ruokablogeja ja haen niistä inspiraatiota
Julkkiskokkien tuotesuositukset ohjaavat valintojani
Kokeilen mielelläni erilaisia reseptejä
Olen ensimmäisenä kokeilemassa uutuustuotteita
Ostan usein tuotteita impulsiivisesti

Q26. Lopuksi kysymme vielä median käytöstäsi. Miten usein teet seuraavia? SKAALA: Useita kertoja päivässä, Kerran päivässä, Muutaman kerran viikossa, Muutaman kerran kuukaudessa, Kuukausittain tai harvemmin, En koskaan
Radion kuunteleminen
TV:n katsominen
TV:n katsominen internetin kautta (esim. Katsomo, Ruutu.fi)
Aikakauslehtien lukeminen
Sanomalehtien lukeminen
Internetin käyttäminen tietokoneella **[DO NOT SHOW NEVER OPTION]**
Internetin käyttäminen puhelimella / tabletilla

APPENDIX 2: ESOMAR's 28 QUESTIONS
(http://www.esomar.org/knowledge-and-standards/research-resources/28-questions-on-online-sampling.php)

The primary aim of these 28 Questions is to increase transparency and raise awareness of the key issues for researchers to consider when deciding whether an online sampling approach is fit for their purpose. Put another way, the aim is to help researchers to ensure that what they receive meets their expectations. The questions are also designed to introduce consistent terminology for providers to state how they maintain quality, to enable buyers to compare the services of different sample suppliers. Notes on the context of the questions explain why the questions should be asked and which issues researchers should expect to be covered in the answer.

These new questions replace ESOMAR's "26 Questions to help Research Buyers of Online Samples". ESOMAR has updated the text to recognize the ongoing development of techniques. While some of the questions remain constant, new questions have been added to incorporate new techniques and new technology in this area. In particular, this revision recognises the broad trend within the industry to build online samples from multiple sources rather than relying on a single panel.

It should be noted that these 28 Questions focus on the questions that need to be asked by those buying online samples. If the sample provider is also hosting the data collection you will need to ask additional questions to ensure that your project is carried out in a way that satisfies your quality requirements. The 28 Questions complement ESOMAR's Guideline to Online Research which was revised in 2011 to add updated legal and ethical guidance and new sections on privacy notices, cookies, downloadable technology and interactive mobile.

COMPANY PROFILE

1. What experience does your company have in providing online samples for market research?

SAMPLE SOURCES AND RECRUITMENT

2. Please describe and explain the type(s) of online sample sources from which you get respondents. Are these databases? Actively managed research panels? Direct marketing lists? Social networks? Web intercept (also known as river) samples?

3. If you provide samples from more than one source*:* How are the different sample sources blended together to ensure validity? How can this be replicated over time to provide reliability? How do you deal with the possibility of duplication of respondents across sources?

4. Are your sample source(s) used solely for market research? If not, what other purposes are they used for?

5. How do you source groups that may be hard to reach on the internet?

6. If, on a particular project, you need to supplement your sample(s) with sample(s) from other providers, how do you select those partners? Is it your policy to notify a client in advance when using a third party provider?

SAMPLING AND PROJECT MANAGEMENT

7. What steps do you take to achieve a representative sample of the target population?

8. Do you employ a survey router?

9. If you use a router: Please describe the allocation process within your router. How do you decide which surveys might be considered for a respondent? On what priority basis are respondents allocated to surveys?

10. If you use a router: What measures do you take to guard against, or mitigate, any bias arising from employing a router? How do you measure and report any bias?

11. If you use a router: Who in your company sets the parameters of the router? Is it a dedicated team or individual project managers?

12. What profiling data is held on respondents? How is it done? How does this differ across sample sources? How is it kept up-to-date? If no relevant profiling data is held, how are low incidence projects dealt with?

13. Please describe your survey invitation process. What is the proposition that people are offered to take part in individual surveys? What information about the project itself is given in the process? Apart from direct invitations to specific surveys (or to a router), what other means of invitation to surveys are respondents exposed to? You should note that not all invitations to participate take the form of emails.

14. Please describe the incentives that respondents are offered for taking part in your surveys. How does this differ by sample source, by interview length, by respondent characteristics?

15. What information about a project do you need in order to give an accurate estimate of feasibility using your own resources?

16. Do you measure respondent satisfaction? Is this information made available to clients?

17. What information do you provide to debrief your client after the project has finished?

DATA QUALITY AND VALIDATION

18. Who is responsible for data quality checks? If it is you, do you have in place procedures to reduce or eliminate undesired within survey behaviours, such as (a) random responding, (b) Illogical or inconsistent responding, (c) overuse of item non-response (e.g. “Don’t Know”) or (d) speeding (too rapid survey completion)? Please describe these procedures.

19. How often can the same individual be contacted to take part in a survey within a specified period whether they respond to the contact or not? How does this vary across your sample sources?

20. How often can the same individual take part in a survey within a specified period? How does this vary across your sample sources? How do you manage this within categories and/or time periods?

21. Do you maintain individual level data such as recent participation history, date of entry, source, etc., on your survey respondents? Are you able to supply your client with a project analysis of such individual level data?

22. Do you have a confirmation of respondent identity procedure? Do you have procedures to detect fraudulent respondents? Please describe these procedures as they are implemented at sample source registration and/or at the point of entry to a survey or router. If you offer B2B samples what are the procedures there, if any?

POLICIES AND COMPLIANCE

23. Please describe the 'opt-in for market research' processes for all your online sample sources.

24. Please provide a link to your Privacy Policy. How is your Privacy Policy provided to your respondents?

25. Please describe the measures you take to ensure data protection and data security.

26. What practices do you follow to decide whether online research should be used to present commercially sensitive client data or materials to survey respondents?

27. Are you certified to any specific quality system? If so, which one(s)?

28. Do you conduct online surveys with children and young people? If so, do you adhere to the standards that ESOMAR provides? What other rules or standards, for example COPPA in the United States, do you comply with?