The Effects of Standarised Tobacco Packaging on Retail Service in the UK

September 2012

Rural **Shops** Alliance

visuality
Pioneers in shopper insight

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1. Executive Summary

1.1 Introduction

The Rural Shops Alliance (RSA), a national trade association working to support the owners of independent rural shops, commissioned Visuality Group Limited (Visuality) to undertake research to better understand the potential effects of standardised packaging legislation on customer service. Such legislation is currently under consideration by the UK government which has set up a consultation process on this issue.

1.2 Methodology

Visuality's approach to shopper research is predicated upon the simple idea that the best way to understand shopper behaviour is to study shoppers unobtrusively in a live retail environment.

Four "convenience stores" were chosen for the study. Each store was fitted with hidden, high definition CCTV cameras, enabling customer and staff behaviour at the cigarette display to be filmed and recorded.

All cigarette transactions over the research period were recorded and subsequently analysed by Visuality's trained video processors, thereby generating a series of metrics relating to each cigarette transaction.

During the first week of the study, the cameras simply filmed the usual store environment, with no changes made to cigarette packaging or any aspect of the cigarette display. This provided control data against which the subsequent test could be compared.

During the second week of the study, all cigarette packs on display were over-sleeved, thereby simulating a standardised packaging display. Again, all cigarette transactions were recorded and subsequently analysed by the Visuality team, generating a new set of data for the test scenario.

In total, 23,887 individual transactions were tracked across all stores of which 3,851 contained tobacco, thereby 16% of all transactions were used to understand the impact of standardised packaging. 5,668 individual packs of tobacco were bought in the 2 week period of the research, an average of 1.5 packs per tobacco transaction.

In addition to in-store filming, a quantitative survey was undertaken during the "test" weeks to understand customers' awareness of and attitude towards the changes.

At the end of the tests, store management and staff were interviewed to understand their experience of the test.

1.3 Findings

1.3.1 Filming

- Total Transaction Time increased significantly in all stores during the test period, often almost doubling:

	Change in Transaction Time
Store 1	+89%
Store 2	+90%
Store 3	+55%
Store 4	+93%

- Total Selection Time increased significantly in all stores during the test period

	Change in Selection Time
Store 1	+45%
Store 2	+60%
Store 3	+75%
Store 4	+91%

- Total Error Rate increased by a factor between 3 and 6 times across all stores during the test period

	Change in Error Rate
Store 1	+17% (x4.4)
Store 2	+17%(x6.7)
Store 3	+21%(x3.6)
Store 4	+19%(x3.4)

- The effects of Standardised Packaging do taper off as staff become more experienced in the new system but Transaction Times, Selection Times and Errors do remain at a higher level than previously

1.3.2 Customer Survey

- All shoppers who intended to buy cigarettes when entering the store went on to purchase cigarettes with no shoppers purchasing cigarettes who did not intent to buy.
- A small percentage of shoppers (+8% in post questionnaire) noticed a change to the store with 69% noticing a change to the cigarette display; either the brown packaging (56%) or the screens (13%).
- When questioned, only +2% of shoppers noted an increase in queue time in the post study (excluding the Leicester store where queue times were impacted heavily by the absence of students)

- There was a +14% increase in shoppers agreeing that 'it was more difficult to find the brand they asked for' in the post study. This was particularly evident in the stores which had shutters in Mount Sorrel +46% and +18% in Moreton in Marsh

1.3.3 Management / Staff Debriefs

Management and staff in all stores found the standardised packaging environment difficult to cope with. There was consensus that it took staff longer to find products, and caused incidences of lost sales.

Some stores were concerned with the overall viability of operating a tobacco counter after a permanent move towards a standardised packaging environment.

2. Introduction

The Rural Shops Alliance (RSA), a national trade association working to support the owners of independent rural shops, commissioned Visuality Group Limited (Visuality) to undertake research to better understand the potential effects of standardised packaging legislation on customer service. Such legislation is currently under consideration by the UK government which has set up a consultation process on this issue.

This document provides background information on the study, specifies objectives and methodology and lists key findings.

2.1 Background

Since the 1960s the marketing and consumption of tobacco products have been subject to increasing regulation, with the objective of reducing uptake of smoking, especially amongst younger age groups, and encouraging cessation. Regulations in the UK have included the setting of minimum age limits, restrictions on advertising and promotional activity, the imposition of health warnings on packs, restrictions on smoking in public places, and a ban on tobacco displays in larger stores.

In November 2010 the UK government announced that it would "look at whether the plain packaging of tobacco products could be an effective way to reduce the number of young people smoking and to help those who are trying to quit smoking". In April 2012 it announced a consultation process on this issue, inviting contributions from interested parties.

Standardised cigarette packaging has been under consideration in a number of countries for some time, however Australia has recently become the first country to adopt this policy, enacting legislation that will be implemented across the country from December 2012. Because no country has yet implemented standardised packaging, there is currently little empirical data on the effect of standardised packaging on customer service.

Much of the debate regarding the likely impacts of standardised packaging on retail performance has been informed by two contradictory studies, both of which relate to the Australian market.

2.2 Deloitte Study 2011

The first study, "Measuring the Effect of Cigarette Plain Packaging on Transaction Times and Selection Errors in a Simulation Experiment" was published by Deloitte in 2010, having been commissioned by the Alliance of Australian Retailers which brings together the Service Station Association, the Australian Newsagents' Federation and the National Independent Retailers Association. The Alliance is supported by British American Tobacco Australia Limited, Philip Morris Limited and Imperial Tobacco Australia Limited.

This study identified a number of costs likely to accrue from the introduction of standardised packaging to Australia:

- Direct Costs, including Stock Management costs; Transaction costs; Product Selection Errors

- Indirect Costs, including Loss of Revenue; Channel Shift to Other Retailers; Security costs

The Deloitte study identified a likely increase in transaction times due to the standardisation of packaging of between 15 to 45 seconds per customer.

Since publication, the Deloitte study has been criticised on the grounds that its findings are based largely on consultations with representatives of retail operators in Australia, who might be seen as having a vested interest in the study's outcome.

2.3 Professor Carter, Curtin University Study: 2011

The second study was conducted by Associate Professor Owen Carter of Curtin University, Western Australia. Professor Carter conducted research with 52 university students, simulating 5,200 tobacco sales. The research, which was presented to the World Conference on Tobacco or Health in Singapore, showed a marginal reduction in simulated selection times from 3.2 seconds to 2.9 seconds – a direct contrast with the Deloitte research.

The research by Associate Professor Owen Carter is the referenced research for the Public Health Research Consortium systematic review into 'Plain Packaging".

There has been some criticism of Professor Carter's study on the basis that aspects of this simulation are unrepresentative of the in-store environment of a typical small retailer.

Against this confused and conflicting background, the RSA felt that a more robust, independent study was needed to provide its members with a clearer understanding of the likely impact of the introduction of standardised packaging on their businesses. Visuality were commissioned by the RSA to conduct this study.

3. The Study: Terms of Reference

The RSA has been funded by British American Tobacco (BAT) to carry out this work and BAT recommended Visuality as having appropriate skills to undertake the project.

Visuality is one of the UK's leading consultancies specialising in research into shopper behaviour and brand visibility. It has been established for over 30 years and has been pioneering the concept of shopper research since 1996.

Both RSA and Visuality agreed to undertake this project on the basis that all work would be conducted independently of BAT and that BAT would have no influence over how the project was conducted or how the research findings would be reported. The research methodology was agreed between Visuality and the RSA with the sole objective of creating a robust study. From the outset, there has been an absolute understanding that Visuality and the RSA will publish the full findings of the study, irrespective of the final conclusions.

4. Research Methodology

4.1 Overview

Visuality's approach to shopper research is predicated upon the simple idea that the best way to understand shopper behaviour is to study shoppers unobtrusively in a live retail environment.

Four "convenience stores" were chosen for the study. A control stage of 7 days was run to compare to the standardised packaging environment which ran for a further 7 days.

Each store was fitted with discreet, high definition CCTV cameras, enabling customer and staff behaviour at the cigarette display to be filmed and recorded.

All cigarette transactions over the research period were recorded and subsequently analysed by Visuality's trained video processors, thereby generating a series of metrics relating to each cigarette transaction.

During the first week of the study, the cameras simply filmed the usual store environment, with no changes made to cigarette packaging or any aspect of the cigarette display. This provided control data against which the subsequent test could be compared.

During the second week of the study, all cigarette packs on display were over-sleeved, thereby simulating a standardised packaging display. Again, all cigarette transactions were recorded and subsequently analysed by the Visuality team, generating a new set of data for the test scenario.

Alongside this behavioural study, Visuality carried out attitudinal monitoring of customers through an in-store survey.

To summarise, filming provided hard data on the impacts of standardised packaging on transaction times with real customers and staff in a real store environment. Interviews provided an insight into how customers felt about the impact of standardised packaging on their customer experience.

At the end of the test period, store management and staff were interviewed to assess their reactions to the test.

4.2 The Stores

Store 1
Store 1 is based in Northern England, in an urban environment. The store is a small format convenience store, and as such has no shutters covering the cigarette gantry.

Store 2

Store 2 is based in the Midlands, England in an urban environment. It usually has a high percentage of students, though most were absent on holiday for the period of the test. The store has a large number of local competitors, including major retail brands. The store is a small format convenience store, and as such has no shutters covering the cigarette gantry.

Store 3

Store 3 is based in South-East England, in a small village in a fairly secluded rural location. The store is a small supermarket and has little local competition. The cigarette gantry is covered by shutters.

Store 4

Store 4 is based in the Midlands, England, in a village just outside a large town. The store is a small supermarket, with a few other local competitor supermarkets. The cigarette gantry is covered by shutters.

4.3 Standardised Packaging Environment

To create the standardised packaging environment, sleeves for tobacco products were created which fully covered the packaging. These were removable so as to confirm the product with the customer. The sleeves were designed to entirely hide the brand packaging, leaving no identifying cues for the staff or customers, save for the type on the standardised packaging sleeve.

The sleeves were designed to comply with all existing UK legislation, but also to reflect any additional requirements that could be gleaned from the government's consultation documentation. Where no legislation or consultation direction existed (text font sizes and colour), Australian legislation was used.

This led to a test pack which complied with current UK regulations, and was as close to the potential standardised pack design as could be predicted.

Sleeves were printed to cover 144 different products stocked across the four stores. (Actual products listed differed from store to store.)

Prior to opening on the first day of the standardised packaging week of research, Visuality executives went into each store to fully sleeve the stock within the cigarette gantry. In addition, executives were called upon to sleeve stock after a stock-up had occurred, with the aim of leaving the cigarette gantry sleeved at all times. (See Research Limitations & Challenges below.)

4.4 In-Store Filming

Each store was fitted with high definition cameras, discreetly fitted into the ceilings so that customers and staff could be filmed without disruption or any changes in behaviour. Digital video files were analysed by the Visuality video processing team using bespoke software that allows the capture of detailed information on the nature and timing of staff and customer behaviour at the counter and display.

The software allowed for accurately timed capture of small details of the retailer/customer interaction. Each common behaviour is logged in the database in line with the following attributes.

Reach counter
Engage with staff
Instruct for tobacco
Turning to retrieve product
Pick up from shelf
Check product with customer
Put on counter
Customer pays for product
Transaction Error

In total, 23,887 individual transactions were tracked across all stores of which 3,851 contained tobacco, thereby 16% of all transactions were used to understand the impact of standardised packaging. 5,668 individual packs of tobacco were bought in the 2 week period of the research, an average of 1.5 packs per tobacco transaction.

The filming analysis included 28 different members of staff. These staff came from a very broad backgrounds, with some just out of school/university and some having English as a second language. Some staff had worked in the shops for many years, others had been there just a few weeks. The age ranges were broad, though all were under 50 and over 18. Some staff were working just 4 hours per week, whereas others (as shop owners) were working over 60.

All data is stored in an MS SQL server based in Germany. It will remain there indefinitely. The film used for the analysis is stored in Leeds, UK, in a facility maintained by Visuality. All filming, processing and storage complies with the UK Data Protection Act, and Visuality are registered with the Information Commissioners Office. Research is carried out in line with the Market Research Society (MRS) guidelines, of which Visuality is a company member.

4.5 Quantitative Customer Interviews

Alongside the In-Store filming, Customer Interviews were conducted in all stores to understand the effect on customer attitudes towards the standardised packaging trial.

The full questionnaire is included as Appendix II

4.6 Retailer Interviews

The retailers and their staff were asked to participate in a project debrief following each trial to get their opinions on how it had affected their store operations.

Visuality moderators sat down with store managers and store staff to discuss the research. The moderators had no prior knowledge of the research results. The discussion guides were deliberately neutral so as to fully explore, without taint, the attitudes of the staff towards the standardised packaging environment, and their opinions of any challenges they had faced.

Findings

5.1 In-Store Filming

Brand	Share of Study Purchases
Richmond	14.6%
Sterling	14.2%
Mayfair	13.7%
Pall Mall	11.6%
Lambert & Butler	10.1%
Benson & Hedges	7.4%
Malboro	5.8%
John Player	5.2%
Windsor	3.8%
Rothmans	2.9%
Berkeley	2.6%
Silk Cut	2.1%
Regal	1.8%
Players	1.0%
Camel	0.7%
Superkings	0.7%
Embassy	0.5%
Chesterfield	0.4%
Old Holborn	0.3%
Winston	0.3%
Maxim	0.2%
Clan	0.1%
Dunhill	0.1%
Vogue	0.1%
Lucky Strike	0.0%

Brand FMC	National Market Share
Mayfair	12.7%
Sterling	12.0%
Lamber & Butler	11.2%
Richmond	10.5%
JPS Silver	8.3%
Windsor Blue	7.2%
Benson & Hedges	6.8%
Marlboro	5.7%
Pall Mall	4.3%
Silk Cut	3.7%
Royals	2.8%
Berkeley	2.6%
Regal	2.0%
Embassy	1.9%
Superkings	1.6%
Red Band	1.2%
Sovereign	1.1%
Sky	0.6%
Rothmans	0.6%
JPS	0.5%

Brand	Share of Study Purchases
Amber Leaf	48.9%
Golden Virginia	18.1%
Gold Leaf	14.8%
Cutters Choice	6.6%
Drum	5.9%
Players	5.7%

Brand RYO	National Market Share
Amber Leaf	34.4%
Golden Virginia Green	24.2%
Cutters Choice	10.5%
Gold Leaf	6.5%
Golden Virginia Yellow	5.7%
Drum	5.6%
JP Silver	3.2%
Old Holborn	2.8%
Sterling	2.1%
Pall Mall	1.5%

The filming analysis registered purchases against 146 different tobacco variants, across 26 different brands. The table below shows the share of brands purchased during the 2 weeks of research, with Nielsen Scantrack data showing national market share.

We expect that this data reflects a degree more of the convenience market than the UK-wide market, as we have focussed on this market in the research. In addition two of the stores were particularly price-sensitive, and as such some of the economy brands may have a higher than expected share. However, generally the in-store film processing tracked the sales against the market closely.

The table below shows the top 10 packs by UK market share, against the top 10 packs in the in-store film analysis for the 2 weeks of research.

Top 10 UK Cigarette Brands	
2011 - UK Market Size	In-Store Filming Sales Share
Lambert & Butler King Size	Lambert & Butler King Size
Mayfair King Size	Mayfair King Size
Marlboro King Size Gold	Marlboro King Size Gold
Richmond King Size	Sterling Superkings
John Player Special Blue	Richmond Superkings
Benson & Hedges King Size Gold	Sterling Kingsize Red
Sterling Superkings	Richmond Kingsize
Sterling King Size	Benson & Hedges King Size Silver
Richmond Superkings	Mayfair King Size Smooth
Mayfair King Size Smooth	Pall Mall Red

The processing of film included transactions without tobacco. The greater impact has obviously been upon tobacco transactions. This has been analysed by store. The total transaction time is the time from the customer arriving at the retailer counter, and when they have left the counter. The selection time is the time from a customer instruction for tobacco to the product being placed on the counter awaiting payment. Therefore transaction times shown include any selection errors, whereas the selection times do not, as any selection errors and time taken to manage them fall outside the selection timings, though would impact on the total transaction time.

When selecting tobacco, members of staff sometimes make a selection error, and the customer will correct them and make their request again. This was coded as a selection error. In the standardised packaging environment the selection errors increased, and they are shown below.

The additional time that errors in selection have added to the total all stores transaction time averages (with an increase of 18% in error rates) is 3 seconds. The 2nd transaction often misses a lot of the 1st selection elements such as 'engage with staff' and 'instruct for tobacco'. Additionally the unwanted pack was not put back on the gantry as it would have needed resleeving, so would be discarded in most cases. Errors do increase the overall store's average of transaction times, but only marginally.

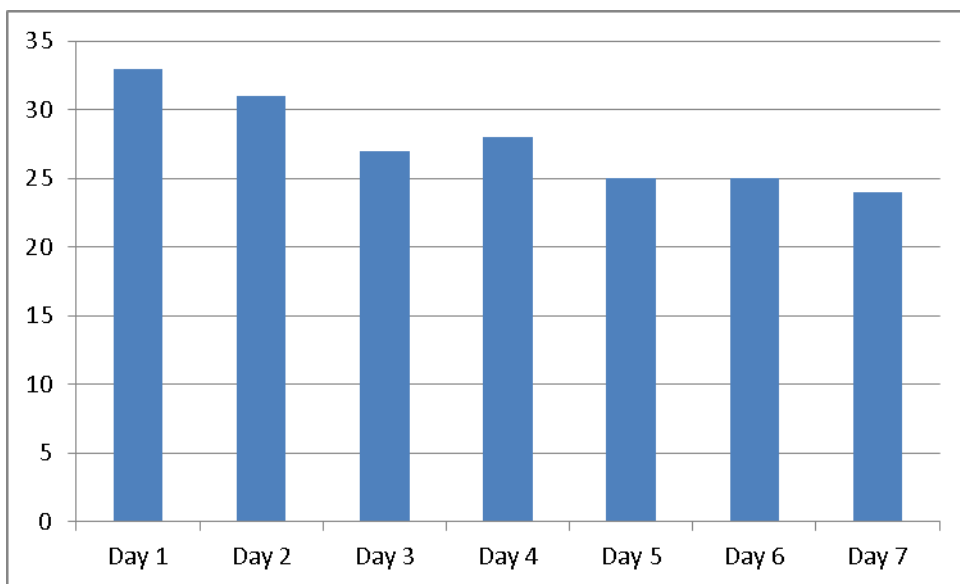|	Control Environment		
	Total Transaction Time	Total Selection Time	Error Rate
Store 1	28	11	5%
Store 2	31	10	3%
Store 3	44	11	8%
Store 4	33	12	8%
ALL Stores	30	11	7%
	Standardised Packaging Environment		
	Total Transaction Time	Total Selection Time	Error Rate
Store 1	53	27	22%
Store 2	59	26	20%
Store 3	68	32	29%
Store 4	62	33	27%
ALL Stores	58	28	25%
	Comparison		
	Total Transaction Time(% Change)	Total Selection Time(%Change)	Error Rate (% Change)
Store 1	89%	145%	17%
Store 2	90%	160%	17%
Store 3	55%	191%	21%
Store 4	88%	175%	19%
ALL Stores	93%	155%	18%
	Comparison (Dark vs Open)		
	Total Transaction Time(+% Change)	Total Selection Time(+%Change)	Error Rate (+% Change)
Dark Stores	90%	153%	17%
Open Stores	71%	183%	20%

It is therefore shown that in tobacco transactions the total transaction time almost doubles to complete the transaction.

It was hypothesised that transaction times and selection times might be different according to how often the packs were bought. As we can see above, there are some brands and variants which are bought significantly more. If it is the case that minor brands are more impacted by the standardised packaging environment then there will be a positive correlation between the volume of purchases and the transaction and selection times.
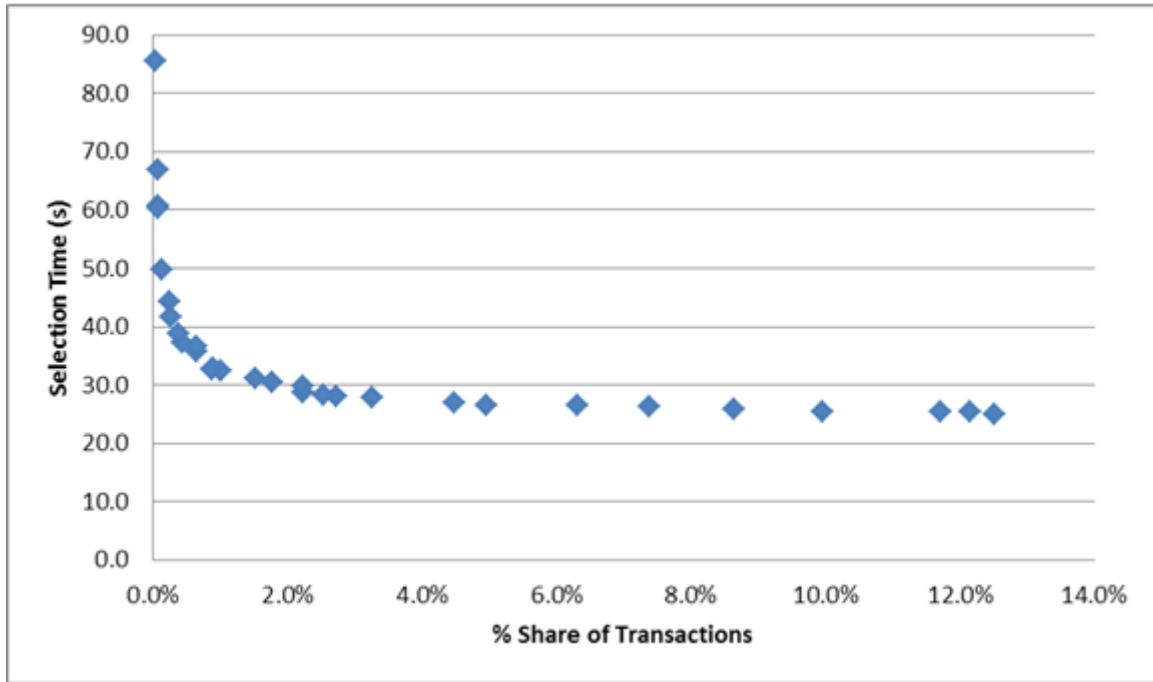
We can see in the above graph that there are some strong correlations in the top brands where the sample size is strong. Lucky Strike which was selected fewer than 5 times through the study took nearly 80 additional seconds to select after the standardised packaging environment was introduced.

It is possible that some of the increase in transaction time is due to staff being unused to the change in packaging environment. It is shown below how the transaction and selection times changed through the period of standardised packaging environment. The anomaly on Day 4 was due to an increase in staff not yet aware of the standardised packaging environment in two of the four stores.

Interaction Start	Interaction End	Control Environment (s)	Standardised Packaging Environment (s)	Change (s)
Reach counter	Engage with staff	8	8	0
Engage with staff	Instruct for tobacco	5	6	1
Instruct for tobacco	Turning to retrieve product	3	6	3
Turning to retrieve product	Pick up from shelf	5	14	9
Pick up from shelf	Put on counter	3	8	5
Put on counter	Customer pays	4	10	6
Customer pays for product	Transaction Error	2	6	4

The table above shows the breakdown of interactions and the change through the customer journey. The increase in time is between the control and standardised packaging environment weeks, and shows the change from the following interaction. We can see how it has taken longer in the periods where the staff interact with the standardised packaging (Turn To Retrieve to Pick Up From Shelf), and again when the customer does the same (Put On Counter to Customer Pays).

The table below shows the number of transactions processed for each store in the control environment and the standardised packaging environment, alongside the percentage of tobacco transactions processed.

	TOTAL Transactions	Control Env.	Standardised Env.	% Tobacco
Store 1	11889	6569	5320	17.5%
Store 2	1780	948	832	14.5%
Store 3	6357	2180	4177	15.4%
Store 4	3861	1692	2169	13.3%
TOTAL	23887	11389	12498	16.1%

5.2 Quantitative Customer Interviews

See Appendix 1.

- All shoppers who intended to buy cigarettes when entering the store went on to purchase cigarettes with no shoppers purchasing cigarettes who did not intent to buy.
- A small percentage of shoppers (+8% in post questionnaire) noticed a change to the store with 69% noticing a change to the cigarette display; either the brown packaging (56%) or the screens (13%).
- When questioned, only +2% of shoppers noted an increase in queue time in the post study (excluding the Leicester store where queue times were impacted heavily by the absence of students)
- There was a +14% increase in shoppers agreeing that 'it was more difficult to find the brand they asked for' in the post study. This was particularly evident in the stores which had shutters in Mount Sorrel +46% and +18% in Moreton in Marsh

5.3 Retailer Interviews

Store 1

"We had quite a few people asking. Why has this happened?"

"A lot of hassle"

"We could give up on it if this happened."

"You couldn't find anything at first"

"People are now saying I'm glad it's gone back"

"Sales just died for the first few days"

"People went elsewhere"

"My boss has filled something in to say we're against this"

"Let's hope it doesn't go through"

"Difficult to say what the effect would be long term"

"There was talk about it going under the counter which is stupid!"

"If people want to smoke they want to smoke and I can't see this making a difference"

"We get a lot of people asking which are the cheapest cigs which makes it harder to deal with this"

Store 2

- As Store 2 relies heavily on the local student trade, the store owner was aware that the differences in transaction time between the control and standardised packaging environment were not as affected as if it had been term time.
  - *"I don't think the sales affected as hugely as if the students had been here...... because we didn't have a huge queue....... once students are here, we have two or three tills running so I could imagine that would cost us quite a bit actually in cigarette sales."*

- An interesting and important problem which the store owner noted was the safety of his staff members having to turn their backs on the customers whilst searching for the correct cigarette pack.
  - *We try not to turn our back on the customers anyway, it's a safety thing, so I try not to get my staff to turn their back too often. If you are having to really look for cigarettes a lot, your back is turned, and it is not a good thing, I don't like them doing it."*

- **Store 3**

- *"We had longer queues but no real complaints"*
- *"It was quite time consuming for us"*
- *"It did slow down our cashiers which is not the best. We want to get customers through the tills as quickly as possible"*
- *"I suppose they would get used to doing it but for a short period of time it would be very difficult"*
- *"I don't think the staff particularly like it...the vibe from them is it's one more thing we have to think about"*

- *"It puts more pressure on selling but gives [the] cashier more time to think about the age of the person they're serving"*
- *"Most of the local customers know what they want so have no hesitation"*

Store 4

- The duty manager of Store 4 had received feedback from both his customers and staff about the queuing time at the counter. As a store that has only recently had shutters implemented, the feedback was often around the frustration of having both standardised packaging and shutters covering them
  - *"Obviously its time consuming, but the feedback from staff and customers was that if you're going to have sliding doors to hide the product, why put the sleeves up as well?"*

- As a supermarket, the duty store manager explained the high number of staff members which will operate the counter in a week, with some members of the team only working one short shift a week. For these members of staff the standardised packaging was more challenging as they have little time to adapt to the changes and learn the planogram of the cigarettes behind the shutters.
  - *"Because there isn't just one member of staff working all the time, there are people that only do 3 hours a week working there, so a late night 5 -9pm on a Friday night, they're not getting used to it so it slows the process down even further because they are not getting used to where things are and then another week goes by and they're back to square one."*
  - *Customers are understanding of what's happening, but it is slowing the process down"*

- Extra detail
  - *"The only problem I overhear is that a new cashier will say they haven't got it, when the reality is it's probably still there, but you can imagine on a busy night like a lottery night the cashiers get flustered, they can't find it, and we have had the odd complaint of how it is slowing the cashiers down."*
  - *"We were selling £5,000 tobacco products a week, now we reopened it is consistently around £4,000 so we've lost 20-25% of sales, but the store has roughly gone up about 10% generally speaking, so that is one of the departments that has dropped and I don't think it's because people are not buying cigarettes, I think it's because they are going somewhere else. If we lost 20-25% of the whole store sales because of things like that [brown packaging] we'd shut down."*

- Feedback from one cashier who had picked up on a few disgruntled customers whilst serving them
  - *"I wouldn't say the customers have been complaining but you can see them twittering or tutting."*

Research Limitations, Challenges and Quality Control

Here we look at the limitations of the research, and address any of the issues that came up during the research, as well as the ways in which some of these difficulties were overcome.

6.1 Standardised Packaging Environment

All stores involved in the research were busy stores, and some had larger pools of staff than others. Additionally, in order to ensure the research was not prejudiced the staff were not significantly briefed other than to tell them that the research was taking place into standardised packaging and to try to operate as normal.

During the period where standardised packaging sleeves were in store it became clear that on three separate occasions the store had stocked unsleeved packs in front of the standardised packaging. This meant there was a breach of the standardised packaging environment.

In the cases where the standardised packaging environment was breached, or where stock was placed on shelf at any point where there was no sleeve on the pack, the transactions taking place at that time were removed from the research, and Visuality went back into store to rectify the situation to allow continuation of the research in line with the methodology outlined above.

On one occasion a full day was removed from the analysis and re-run as the standardised packaging environment had been compromised. The day was re-run a week later to match the trading days. This day was only included in the final analysis when it was checked to show that it did broadly conformed to the rest of the store trading and operational patterns.
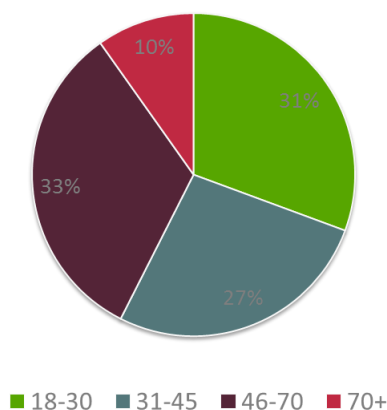
6.2 Film Analysis

Visuality take pride in the accuracy and simplicity of customer behaviour studies and filming analysis, however, as with any task involving human interpretation, there can be mistakes made. This is combatted by a stringent quality assurance program, whereby 10% of all film analysis is re-run by different operators. Where any of the results of this 10% differs by 5%, a further 10% of any affected operators work is checked.

On rare occasions analyses by certain operators can be removed from the results, and the film analysis re-run. However, in the case of this research this was not necessary, and QA results came back positive with the checked sample coming back within 5% of the original analyses.
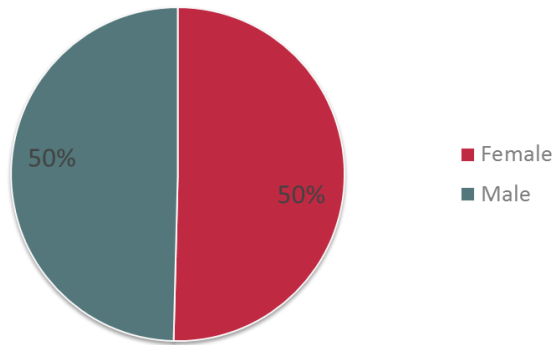
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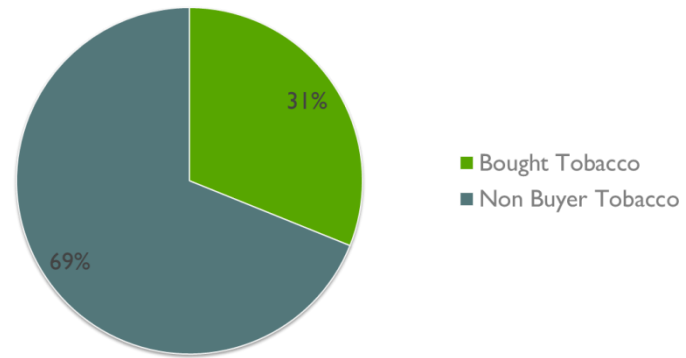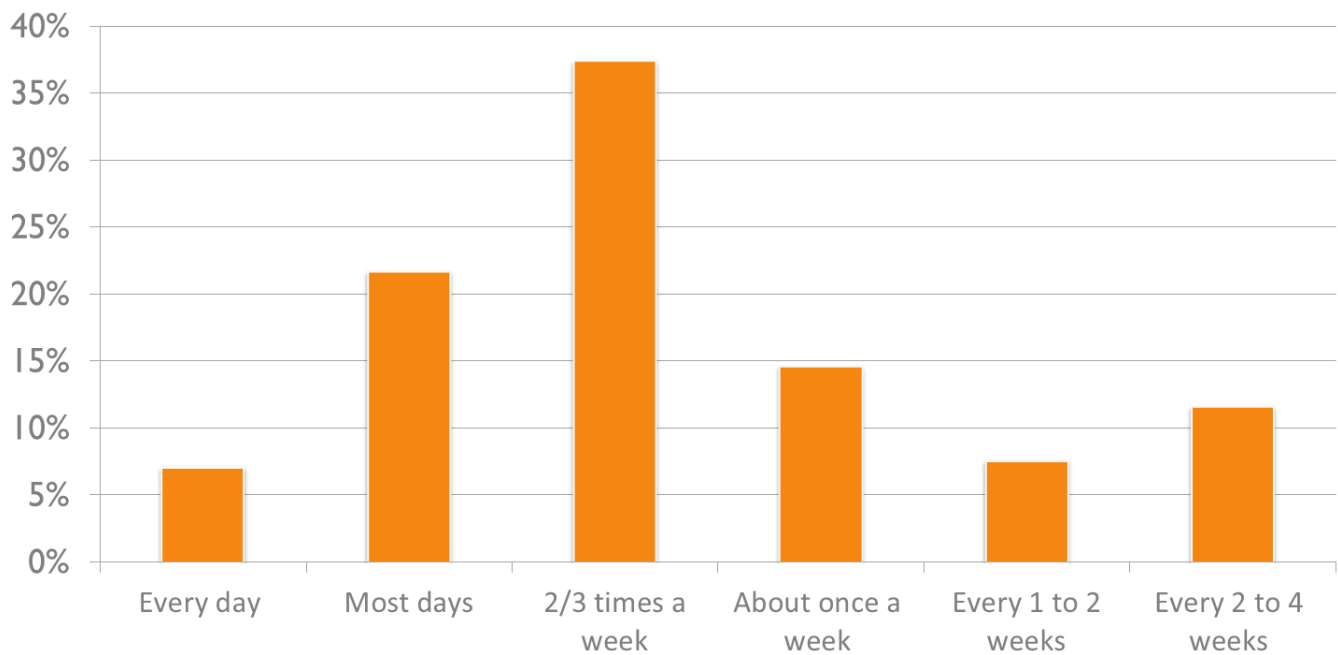
Appendix I: Quantitative Customer Interviews – Full Data

Age

■ 18-30 ■ 31-45 ■ 46-70 ■ 70+

Gender

- Female 50%
- Male 50%

Tobacco purchases

- Bought Tobacco 31%
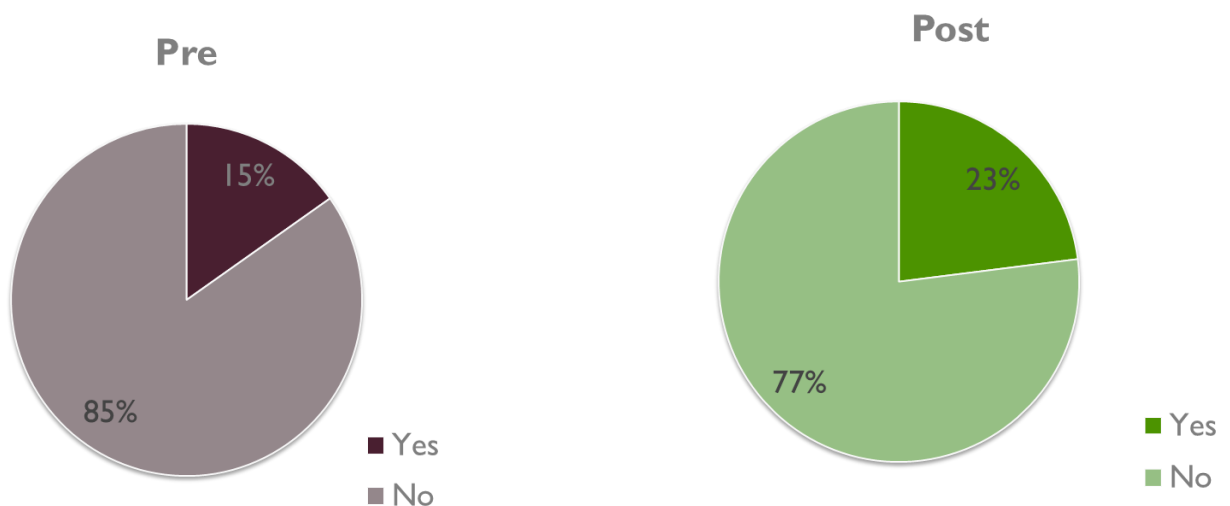- Non Buyer Tobacco 69%

Q4. How often do you buy cigarettes/tobacco in this store?

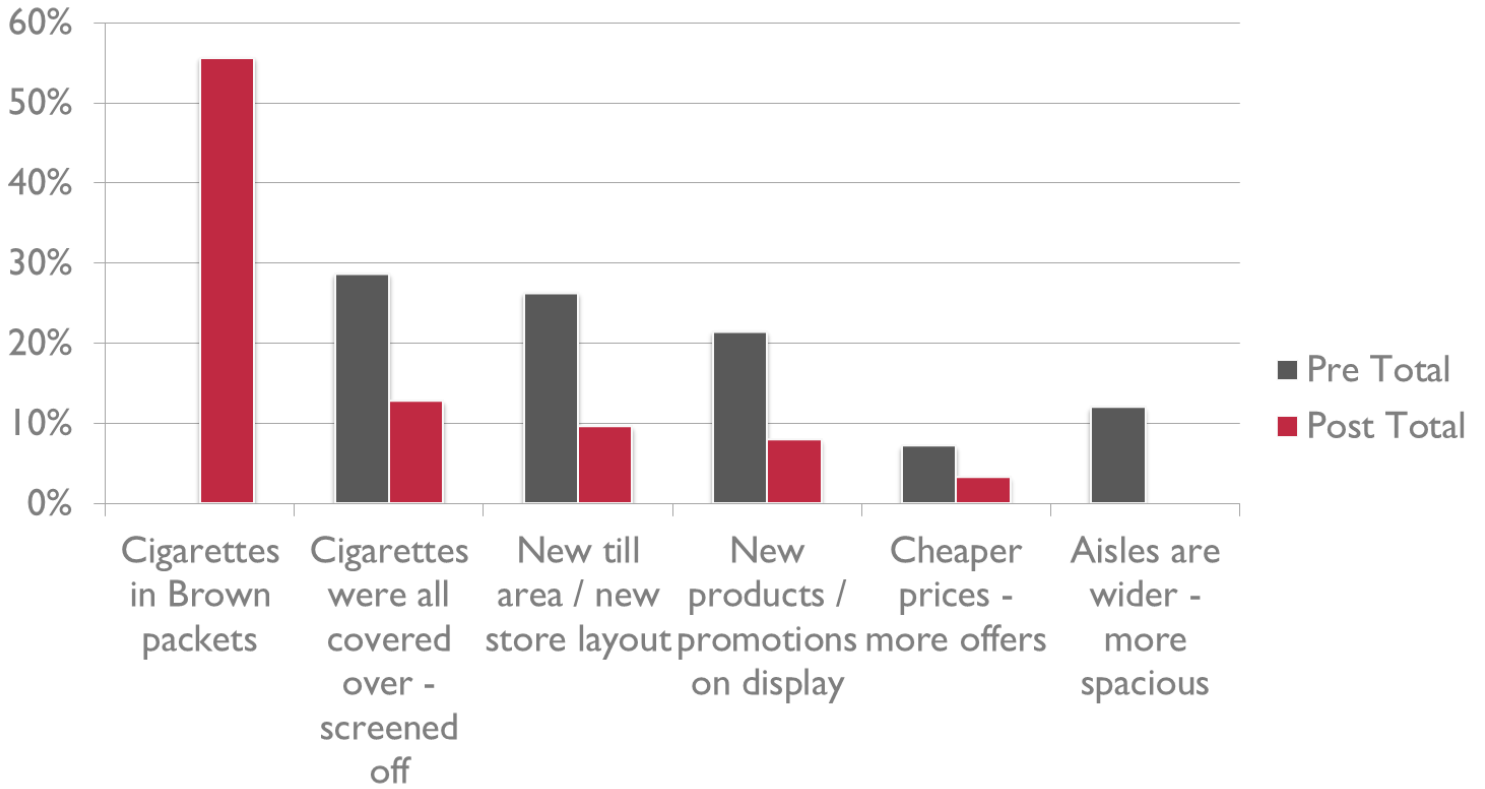Q4. How often do you buy cigarettes/tobacco in this store? n = 198

Q9. Did you notice any changes to the store today?

Pre

- Yes 15%
- No 85%

Post

- Yes 23%
- No 77%

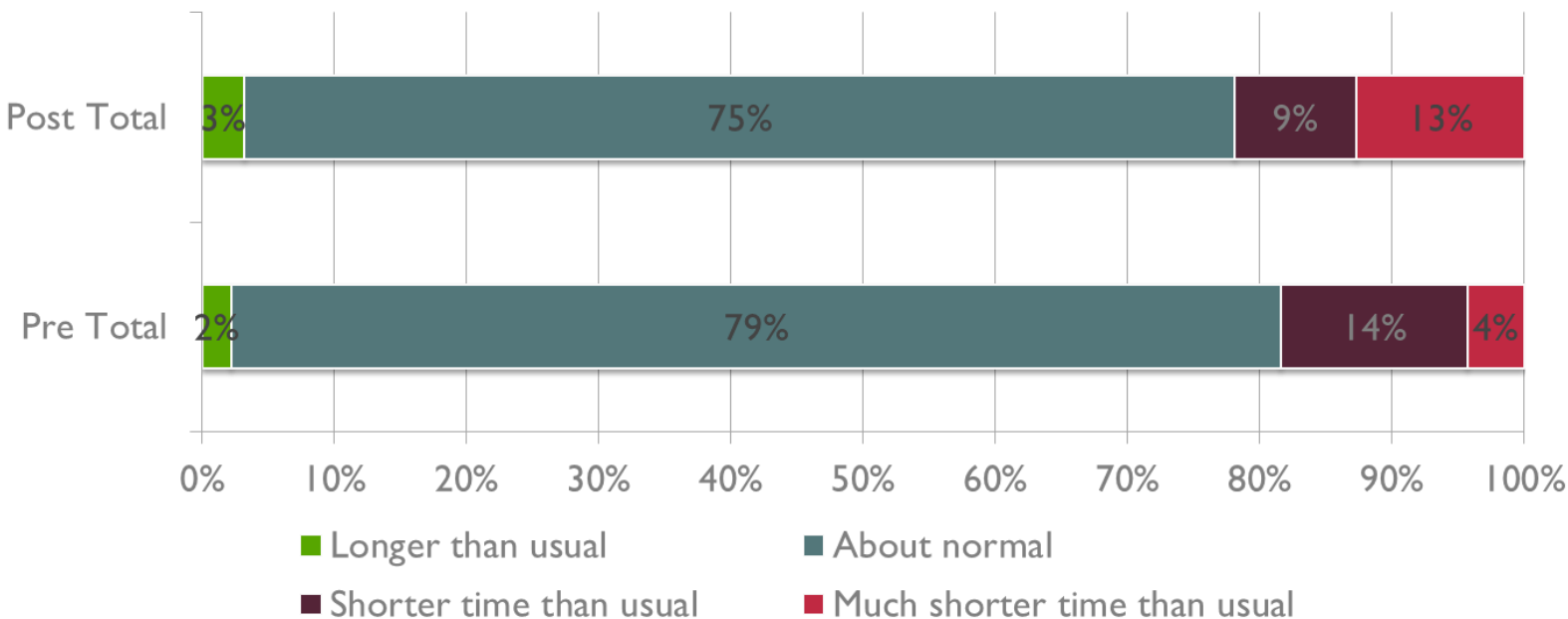Q9. Did you notice any changes to the store today? Pre n = 276 Post n = 274

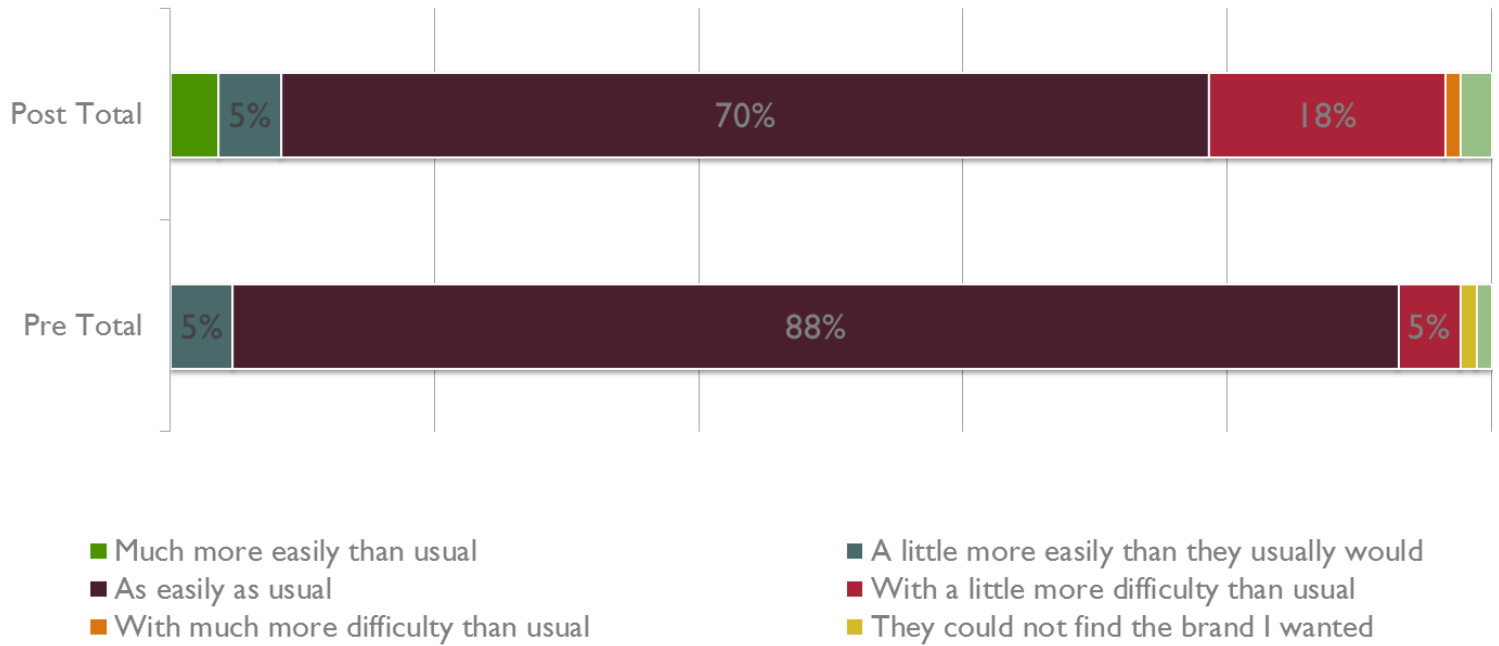# Q10. What changes did you notice?

Q10. What changes did you notice? n = 105

# Q15. Thinking about your visit today, how long did you have to queue to pay?

Q15. Thinking about your visit today, how long did you have to queue to pay? Pre n = 276 Post n= 283

Q20. How easily did the member of staff who served you find the brand you asked for?

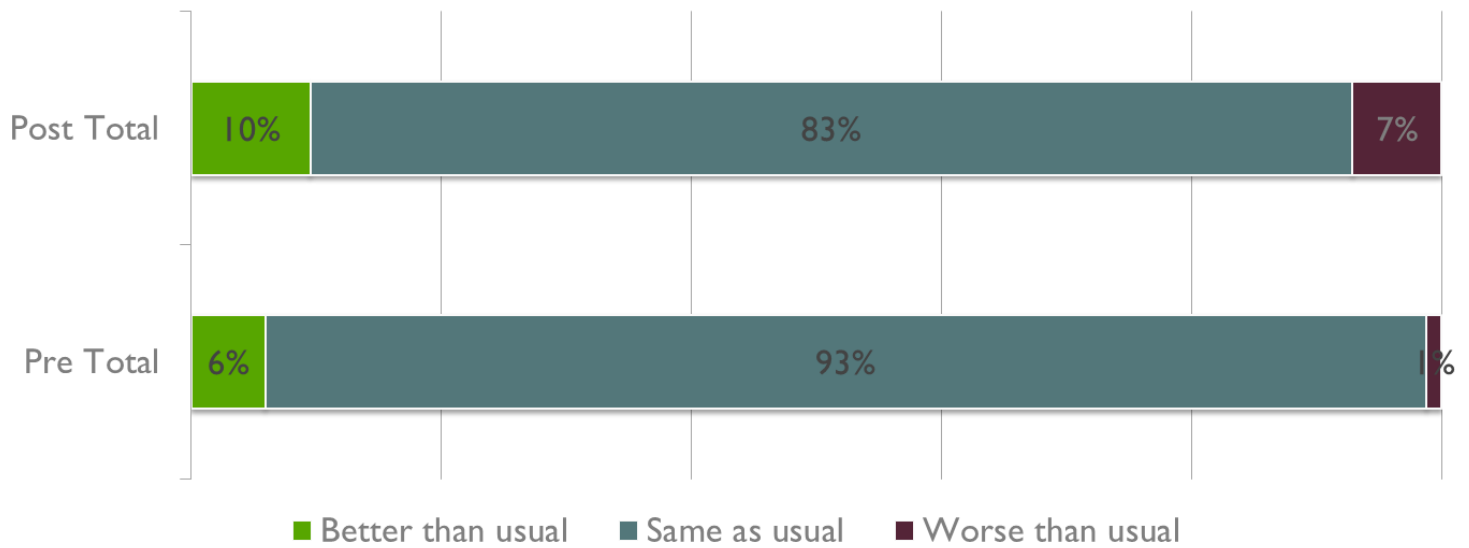|	Much more easily than usual	A little more easily than they usually would
	As easily as usual	With a little more difficulty than usual
	With much more difficulty than usual	They could not find the brand I wanted

Q20. How easily did the member of staff who served you find the brand you asked for? Pre n = 276 Post n= 283

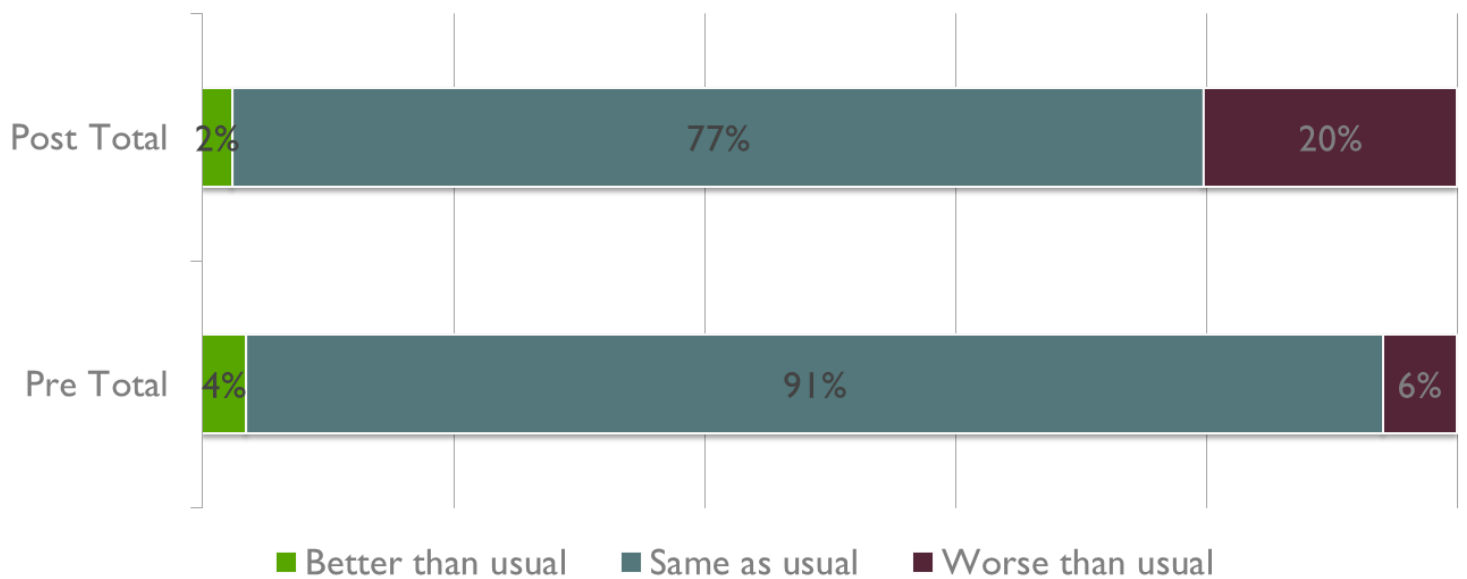# Q21. Level of performance: 'Having the right cigarette and tobacco brands in stock'.

| | Better than usual | Same as usual | Worse than usual |
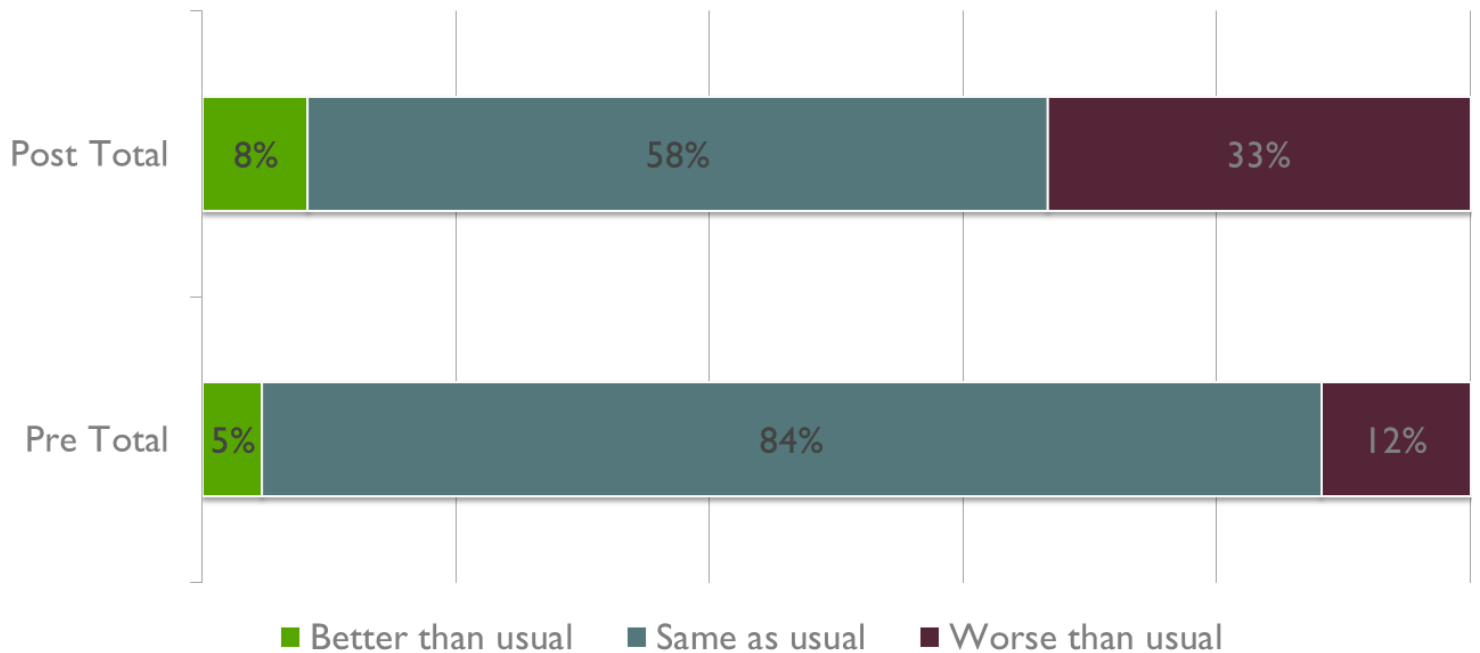
Q21. Level of performance 'Having the right cigarette and tobacco brands in stock'. Pre n = 85 Post n= 84

Q21. Level of performance: 'Making it easy to see the cigarette or tobacco brand I wanted'.
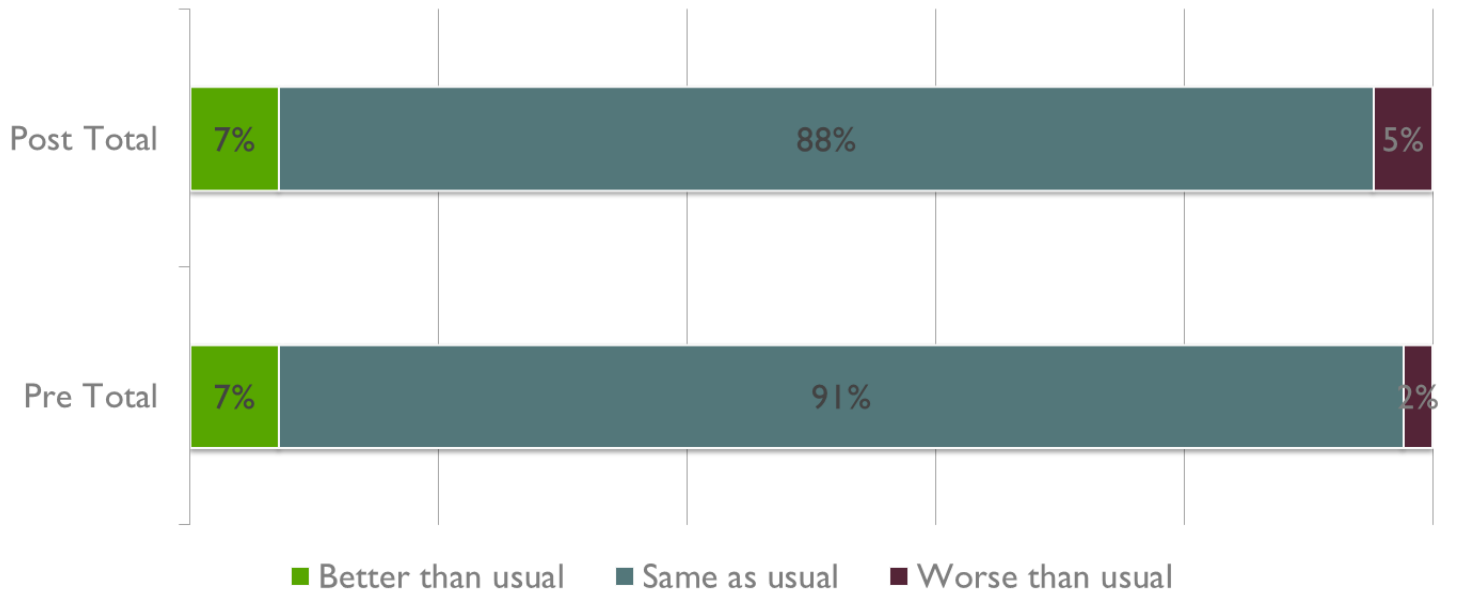

	Better than usual	Same as usual	Worse than usual
Post Total	10%	83%	7%
Pre Total	6%	93%	1%

Q21. Level of performance 'Making it easy to see the cigarette or tobacco brand I wanted' Pre n = 85 Post n = 84

Q21. Level of performance: 'Allowing me to be able to choose the cigarette or tobacco brand I wanted'.

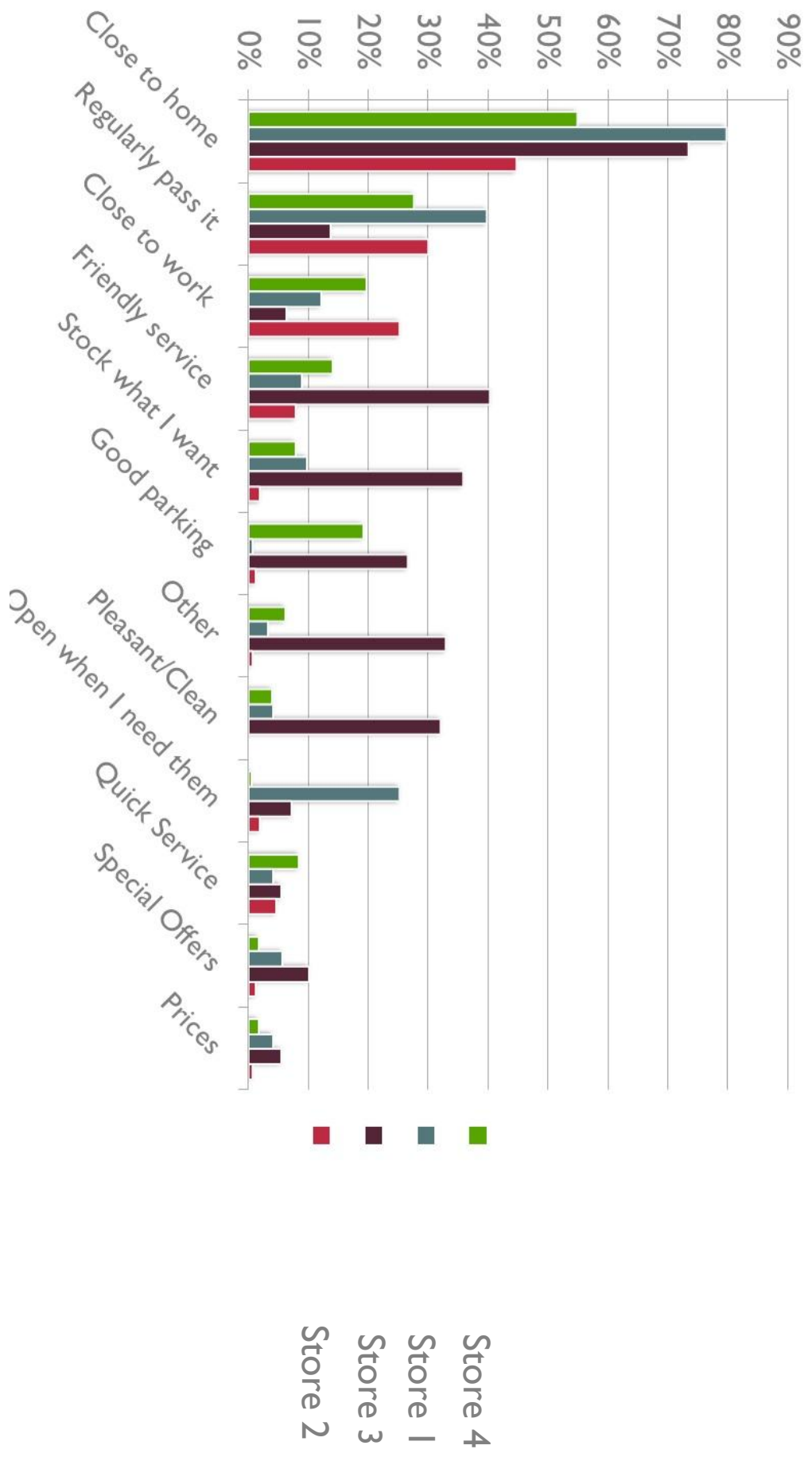|	Better than usual	Same as usual	Worse than usual
Post Total	2%	77%	20%
Pre Total	4%	91%	6%

Q21. Level of performance 'Allowing me to be able to choose the cigarette or tobacco brand I wanted' Pre n = 85 Post n = 84

Q21. Level of performance: 'The time I waited to be served'.

Post Total: 7% | 88% | 5%

Pre Total: 7% | 91% | 2%

■ Better than usual ■ Same as usual ■ Worse than usual

Q21. Level of performance 'The time I waited to be served' Pre n = 85 Post n = 84

Q12. Why do you come here shopping?

Categories (top to bottom): Close to home, Regularly pass it, Close to work, Friendly service, Stock what I want, Good parking, Other, Pleasant/Clean, Open when I need them, Quick Service, Special Offers, Prices

Legend: Store 4, Store 1, Store 3, Store 2

Q12. Why do you come shopping here Store 4 n = 177, Store 1 n = 123 , Store 3 n = 109, Store 2 n = 150