PATH TO PURCHASE
BEHAVIORS AT COLD VAULT

VideoMining

Comprehending shopper behaviors can pose a challenge if the wider context is overlooked. With the industry expanding in size, depth, and intricacies, consumers hold seemingly limitless choice and purchasing power across channels, shopping experiences, products and brand attributes. To unravel the subtleties of the cold vault and capitalize on hidden growth opportunities, VideoMining invites you to delve into essential benchmarks that delineate the cold vault journey and total store performance, derived from observations of authentic shopper behavior, decoded by behavioral science and patented AI technology.

JOURNEY MAPPING

The shopping journey begins far before customers reach the cooler doors. VideoMining tracks every step of the shoppers' experience, from pump to checkout, to help you connect the dots. Why? Because every micro-moment holds essential information to more effectively attract, engage, convert shoppers. Take a look at some of the critical moments along the route to, and from, the vault.

ARRIVALS

The journey begins the moment the customer arrives on the property. This includes the pump, the parking lot, and the forecourt.

PRE-VAULT

Includes all steps before reaching the vault, such as the store entrance and front end. It also includes all stops before reaching the vault, which requires a deeper look at trip sequencing.

AT THE VAULT

Multiple steps of navigation as the shopper searches for the cooler door that holds product categories that are relevant to their desired purchase, and then navigate between brands, styles, and price points once they find THEIR category of choice.

POST-VAULT

Every step of the in-store journey after the cold vault. Includes categories and store destinations that are shopped secondarily, along with the front end, store exit, lot, and forecourt once more.
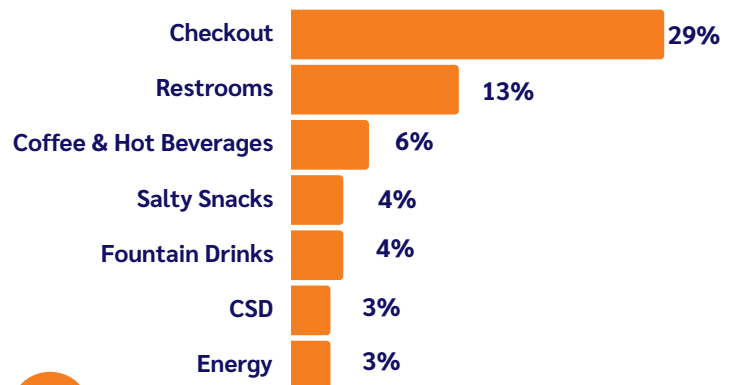
TRIP SEQUENCING

The first zone of a shoppers' in-store journeys speaks heavily to the **mission of their trip** and their **primary purchase intent**. Shoppers who are on the first leg of their journey are *on a mission* and are most likely to experience tunnel vision until their mission has been achieved. If you look closely, your shoppers' footsteps tell a unique story that contextualizes every micro-moment of the store experience.

FIRST DESTINATION TRACKING:
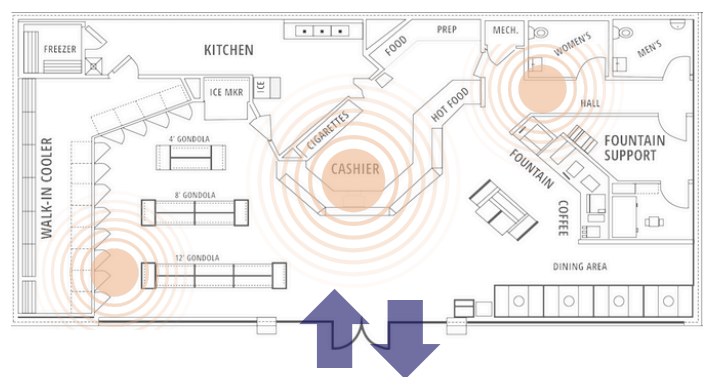
We tracked over 100,000 unique c-store shopper journeys to identify patterns of trip sequencing and missions. The most common **first destinations** for c-store shoppers include:

Destination	%
Checkout	29%
Restrooms	13%
Coffee & Hot Beverages	6%
Salty Snacks	4%
Fountain Drinks	4%
CSD	3%
Energy	3%

!

The first stop of the shopper journey is strongly influenced by trip mission, daypart, and demographic.
- Hispanic shoppers are 2.3x more likely to visit **Energy Drinks** as their first stop in-store.
- **41% of Beer Shoppers** purchase from another category before shopping for beer. Of those Beer Shoppers whose 1st stop in-store is another category, nearly **double** shop **salty snacks** as opposed to candy and sweet snacks.

## COLD VAULT TRAFFIC PATTERNS

TRAFFIC FLOW MAPS
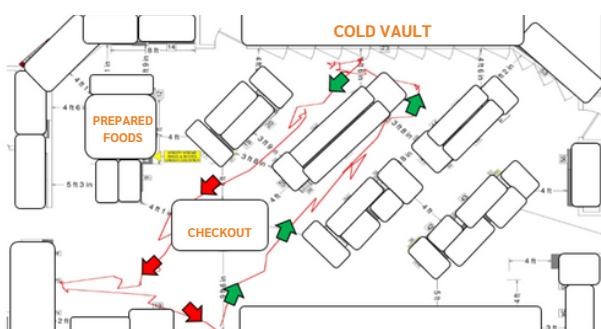
Traffic flow maps indicate the sequence of the shoppers' steps as they traverse the store. By tracking total store activity, overlaid with POS data, VideoMining identifies the sequence of the trip, along with the basket affinities and cross-trip purchases. By decoding across hundreds of thousands of shopper journeys with patented AI platform, VideoMining identifies the most common routes, behaviors, and reactions to in-store stimuli.

Key Cold Vault Considerations: Traffic Flow

- Trip sequencing speaks strongly to mission and primary purchase intent.
- Primary routes to/from the cold vault should be analyzed to identify if secondary impulse categories are receiving their fair share of exposure.
- U-Turns and rebounds can indicate when shoppers are navigating to find their target area with a degree of difficulty

Redesigning aisle configuration to encourage more cold vault traffic to pass through salty snacks increased aisle exposure rate and incremental impulse buys by 2x

STORE HEAT MAPS
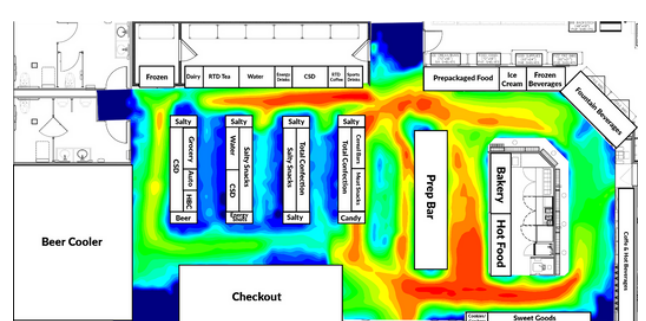
Store heat maps help contextualize the concentration of foot traffic across the total store footprint. VideoMining leverages patented computer vision and machine learning tools to quantify the level concentrated traffic by shopper profile, such as those who purchase at least 1 beverage from the cold vault. We also look to heat maps to identify the patterns of dwell traffic, that is, the areas where shoppers spend the most time standing still. Our AI tools can decipher if these areas of dwell time indicate a person actively stopped and shopping, versus waiting in line, and so on.

Key Cold Vault Considerations: Heat Maps

- Areas with high traffic exposure can indicate zone popularity, however, without considering dwell time and purchase intent, can be misleading.
- CPGs should consider that high traffic zones do not necessarily translate to high engagement zones for secondary displays.
- At-shelf decision making can be dissected into key activities: navigating, shopping, and deciding.

C-Store operators have improved productivity per sq. ft. from 300-500% after analyzing traffic flow patterns and making minor layout tweaks.

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SEQUENTIAL SHOPPING BEHAVIORS

VideoMining observes and decodes distinct behaviors during each shopper journey. The cold vault experience as a whole is dissected into multiple micro-moments that must be considered as independent moments of influence that collectively shape the shopper journey and resulting shopping decisions.

Navigating the Vault
Finding the right cooler door for the mission.
"I want an alcoholic beverage. Which door should I start with?"

Actively Shopping
Once you've found the right zone, the act of fully engaged shopping - collecting information, reading labels, comparing prices.

Post-Vault Journey
Final steps after the cold vault, including other categories shopped, other aisles visited, checkout and exit.

1
Every micro-moment of the on-site experience leading up to the vault. Impressions and influence begins as soon as the shopper pulls onto the lot and continues throughout the store.

Pre-Vault Journey

2
Navigating the door in detail, searching for the segment or sub-category of choice.
"I found the alcoholic beverages, but where are the hard seltzers?"

Navigating the Door

3 **4**
Concluding the shopping moment, either with an item in hand to purchase, or walking away empty handed.

Decision Making

5

MOMENTS THAT MATTER

From every active shopping moment and deliberation, one of two outcomes can emerge. To get closer to the why, go back to basics and ask yourself: in the moment of truth, did the shopper make a purchase decision, or did they walk away empty-handed?
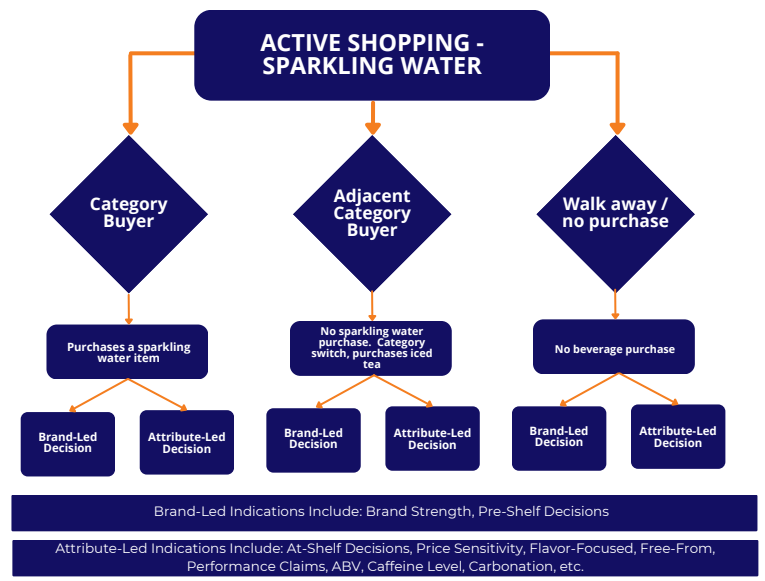
CONVERSIONS

"Active Shoppers" are fully engaged at the shelf, and are identified via VideoMining's patented AI and computer vision platform. Not all "active shoppers" convert to buyers, and the conversion rates vary dramatically by category.

Active Shopper-to-Buyer Conversion Rate

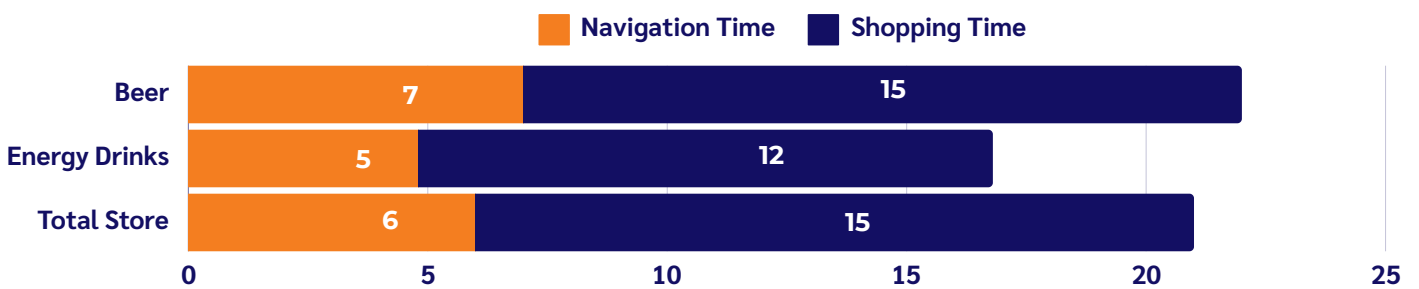|	
Fountain Beverage	64%
CSD	38%
Water	33%
Sports Drinks	21%
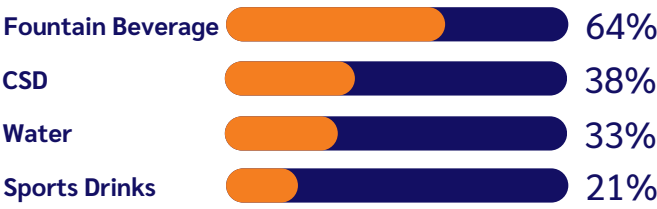
LEAKAGE

Each element of leakage can be explored individually to understand cannibalization, category blurring, segment switching, and walk-aways empty handed. Consider the following example:

ACTIVE SHOPPING - SPARKLING WATER

Category Buyer
Purchases a sparkling water item
- Brand-Led Decision
- Attribute-Led Decision

Adjacent Category Buyer
No sparkling water purchase. Category switch, purchases iced tea
- Brand-Led Decision
- Attribute-Led Decision

Walk away / no purchase
No beverage purchase
- Brand-Led Decision
- Attribute-Led Decision

Brand-Led Indications Include: Brand Strength, Pre-Shelf Decisions

Attribute-Led Indications Include: At-Shelf Decisions, Price Sensitivity, Flavor-Focused, Free-From, Performance Claims, ABV, Caffeine Level, Carbonation, etc.

EXPERIENTIAL DIAGNOSTICS

How do you improve your category conversion rates, trip profitability and store revenue? The answer is simple. Take it step by step. Dissect each micro-moment of the shopper journey, analyzing it across a significant sample size with scale, speed, and precision to quickly identify hurdles that stop cold vault excellence.

Activity at Cold Vault: Navigating v. Active Shopping Time (in seconds)

Navigation Time | Shopping Time

	Navigation Time	Shopping Time
Beer	7	15
Energy Drinks	5	12
Total Store	6	15

0   5   10   15   20   25

NAVIGATING → ACTIVE SHOPPING

NAVIGATION TIME
- How long do shoppers traverse the cooler doors before accurately identifying the right door for their current mission?
- At what point down the aisle did the shopper *know* that they had entered the desired zone?
- How long will category shoppers search before giving up?

ANCHORS AND WAYFINDING
- How do the aisle anchors play a role in nudging the shoppers in the right direction, or perhaps inspire basket building?
- What decision hierarchy does the category shopper apply to the cooler doors?

SIGNAGE AND INFLUENCE
- How do shoppers respond to signage and secondary displays adjacent to the cold vault?
- How is in-aisle navigation influenced by the presence of various point-of-connection materials?

SHOPPING TIME
- How long is the shopper actively shopping before giving up?
- What is the cut off point at which shoppers experience shopping fatigue and become less likely to convert?
- What are the distinguishable steps of the shopping process, and what percent of active shopping time is dedicated to each act?

ADJACENCIES AND ASSORTMENT
- What level of complexity and choice drives the most profitable outcome?
- What are the distinct category lines that are blurred in the shoppers' decision process?
- What other beverage categories are actively shopped in the same mission?
- How do adjacencies influence purchase decisions?
- How does product assortment and SKU complexity influence shopping behaviors?

MICRO-BEHAVIORS AT THE SHELF
- How do shoppers interact with the products?
- How often do buyers actively read the product labels before making a decision?
- How often are items picked up and then put back?
- When do shoppers make their purchase decision? **Pre-Shelf Decision Making** occurs when shoppers "beeline" right to their desired brand and product of choice, whereas **At-Shelf Decision Making** occurs when shoppers are more considerate and open to influence in the moment of choice at the shelf. These metrics speak to brand strength and category decision hierarchies.