Retail research
June 2014, Australia

# Research **Summary**

The Shopper Research across five key cities in Australia- Melbourne, Sydney, Brisbane, Adelaide & Perth has been done by AdNear using Mobile Tracking.

The study reveals the trends & behaviour differences amongst grocery shoppers & general shoppers across different cities.

We saw a major skew towards Melbourne & Sydney in both shopper categories due to the market size. Women dominated the shopping landscape but by a much higher margin in the general shopping bucket. The Grocery Shopping mix saw 54% Females compared to 70% Females in the General Shopping mix.

Homemakers & Professionals were found to be the top segments doing grocery shopping, with majority of it happening on Thursday evenings in the second week of the Month. Grocery shopping slowed down on the weekends compared to weekdays.

Melbourne & Sydney had almost 2x affluent in their audience mix compared to the other cities for general shopping. Professionals topped the shopping segment table in Sydney compared to Homemakers in Melbourne. While Adelaide & Brisbane saw a dip in the last two weeks of the month, other cities had a more even trend. Thursday evenings were popular amongst general shoppers too, but even Sundays were popular shopping days in Melbourne & Sydney.

Companies striving to achieve or sustain high engagement with their customers would find interesting insights on shopping behaviour in the report.

AdNear is able to get the accurate location of Mobile devices with privacy of the user intact, using its proprietary location technology. The reservoir of location data is then analysed to build audiences over a period of time.

## ABOUT ADNEAR

AdNear is a big data company that leverages geo-location to drive superior ad targeting across mobile devices. We believe that historical location data combined with content behavior gives us the most powerful audience insights.

We continuously strive to innovate and develop advanced technologies that help us break the boundaries of mobile advertising. Our advertising platform is built on top of proprietary hybrid geo-location platform, giving us the strength of location awareness on phones without the need of GPS or operator assistance.

AdNear is headquartered in Singapore and backed by investments from Canaan Partners and Sequoia Capital. We have operations in Singapore, USA, India, Australia & Indonesia.
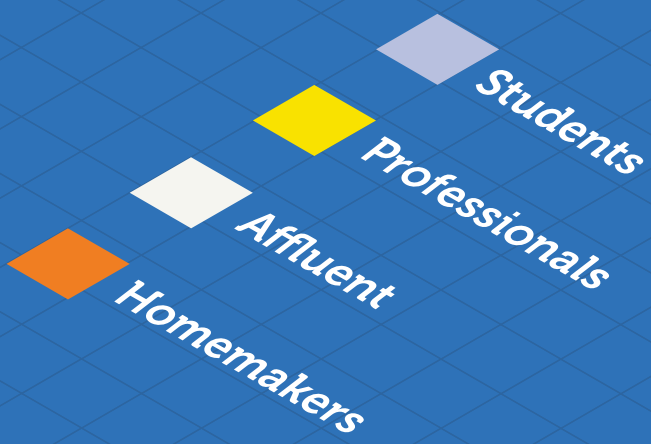
# Research **DETAILS**

Methodology
**Mobile Tracking**

Duration
**3 months
February - April, 2014**

Sample Size
**300k users**

# Audience split
# Across AU CITIES

Students
Professionals
Affluent
Homemakers

Perth

Melbourne also has higher Homemakers compared to other cities in its audience set

Brisbane

Adelaide

Sydney

Melbourne

15%
24% 33% 25%

13%
26% 40% 31%

High Affluent Audience

Melbourne & Sydney have higher Affluent audiences compared to other cities

High Affluent Audience

## Professionals are the leading audience across cities

We have studied 5 cities in this study and the audience landscape in each city is different. We chose Affluent, Homemakers, Professionals & Students from our audience pool for this study.
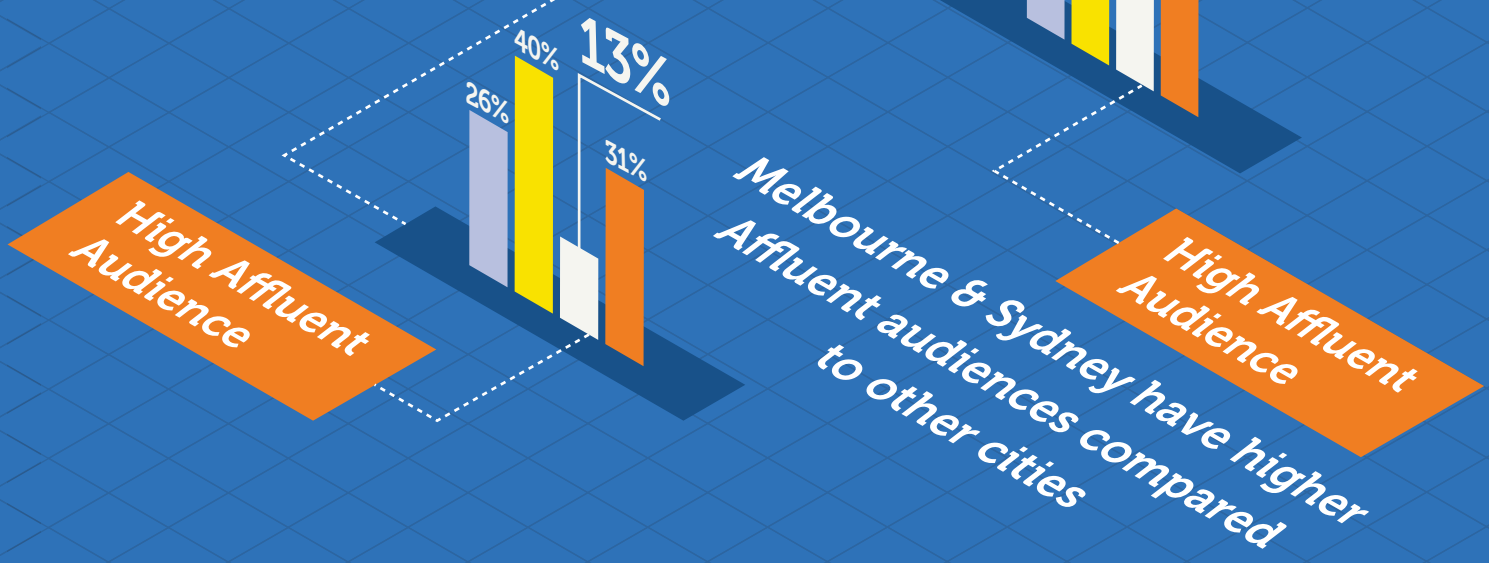
# City Wise
# Shoppers Split

**Grocery Shoppers**

**VS**

**General Shoppers**

43% Melbourne

3% Adelaide

7% Perth

6% Brisbane

41% Sydney

1% Adelaide

34% Melbourne

12% Brisbane
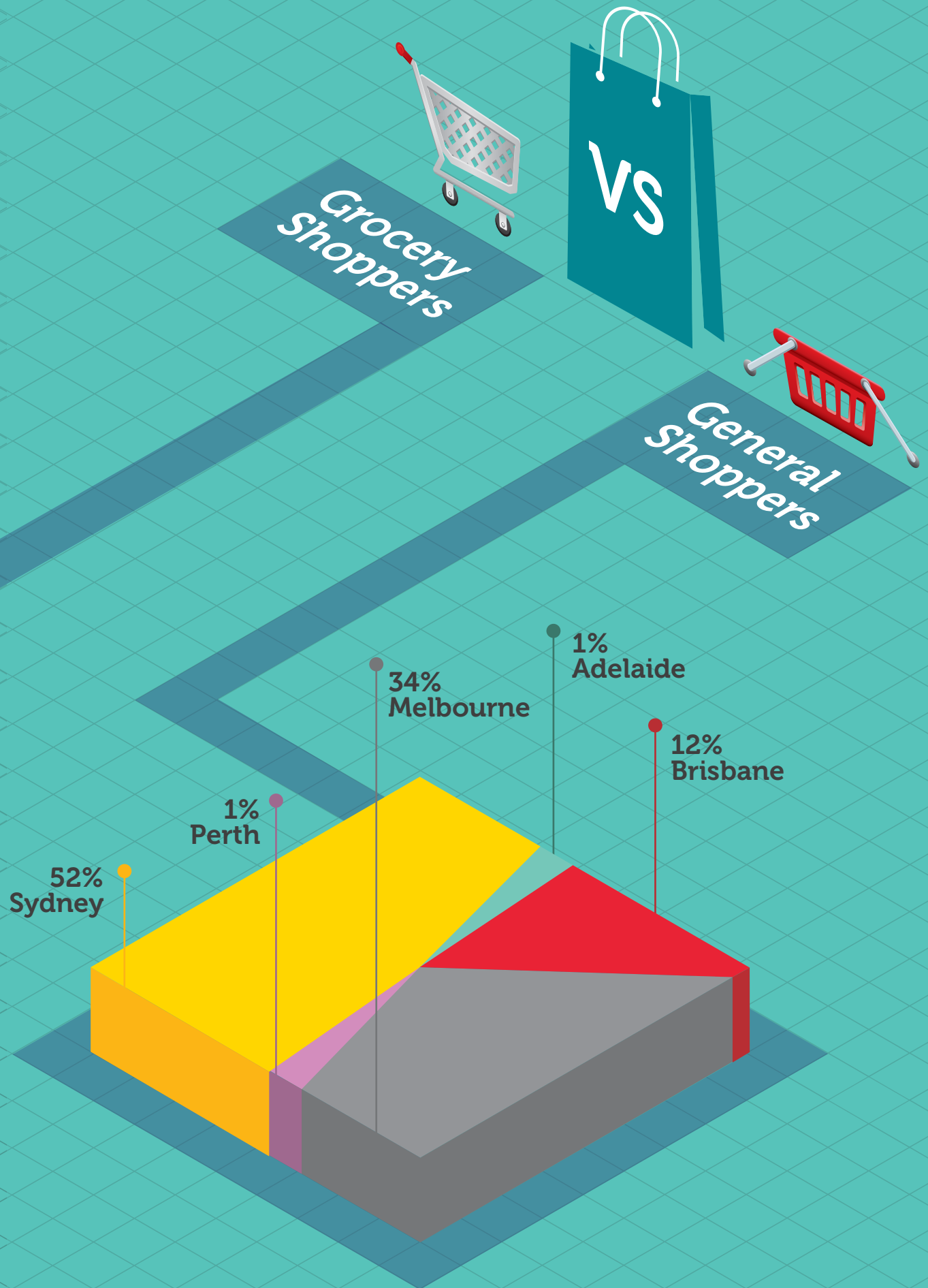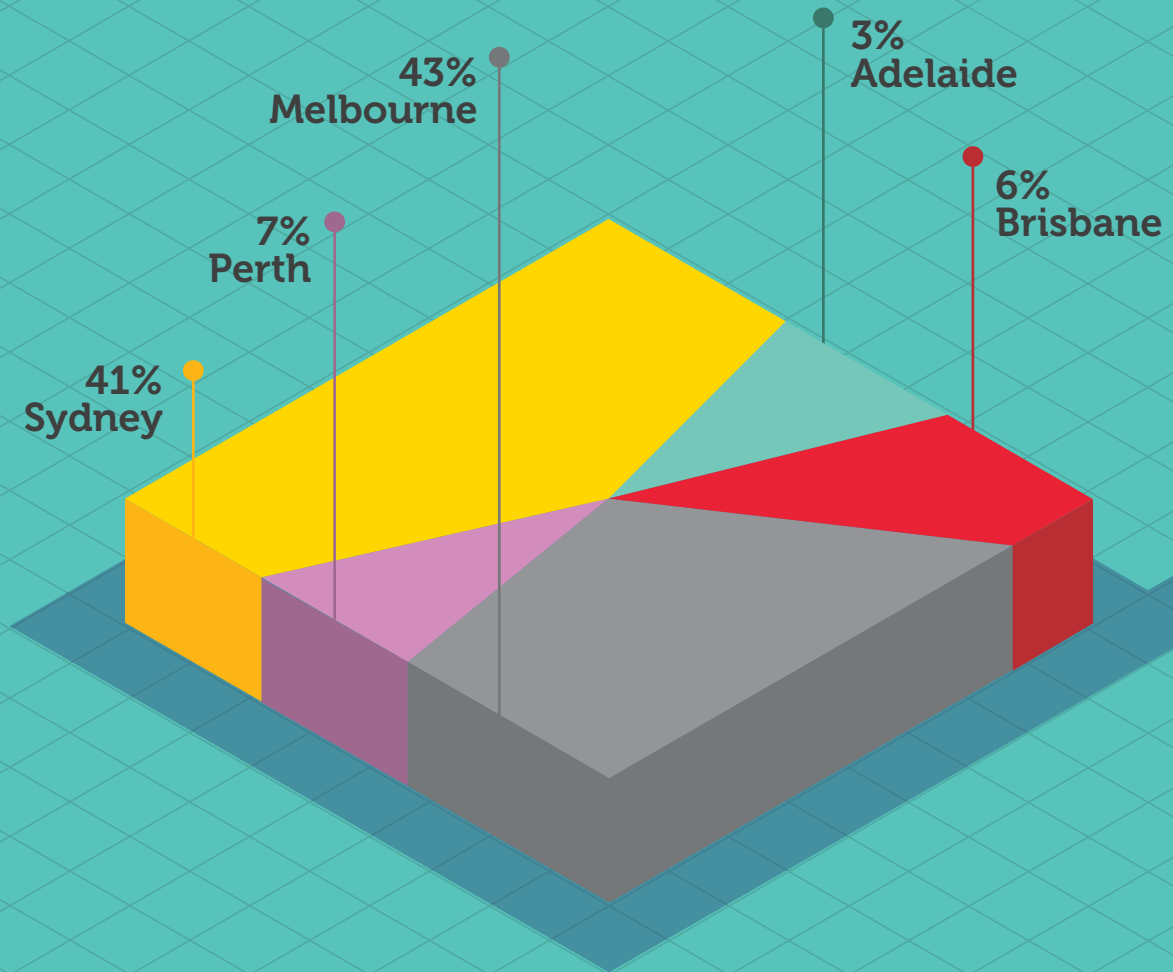
1% Perth

52% Sydney

## Sydney & Melbourne constitute the major chunk in the Shoppers pie

Due to larger market sizes, Sydney & Melbourne form a huge chunk of Grocery & General shoppers. However, the split varies per city, particularly for Perth & Brisbane: Brisbane contributes 12% to the General Shoppers bucket, and 6% to the Grocery Shopping bucket whereas the trend is reverse for Perth, which contributes 1% to the General Shopping bucket & 7% to Grocery Shopping.

# City Wise
## Gender Split

**46%** **54%**  VS  **30%** **70%**

Grocery Shoppers

General Shoppers

Male  Female

Sydney  Perth  Melbourne  Brisbane  Adelaide

Sydney  Perth  Melbourne  Brisbane  Adelaide
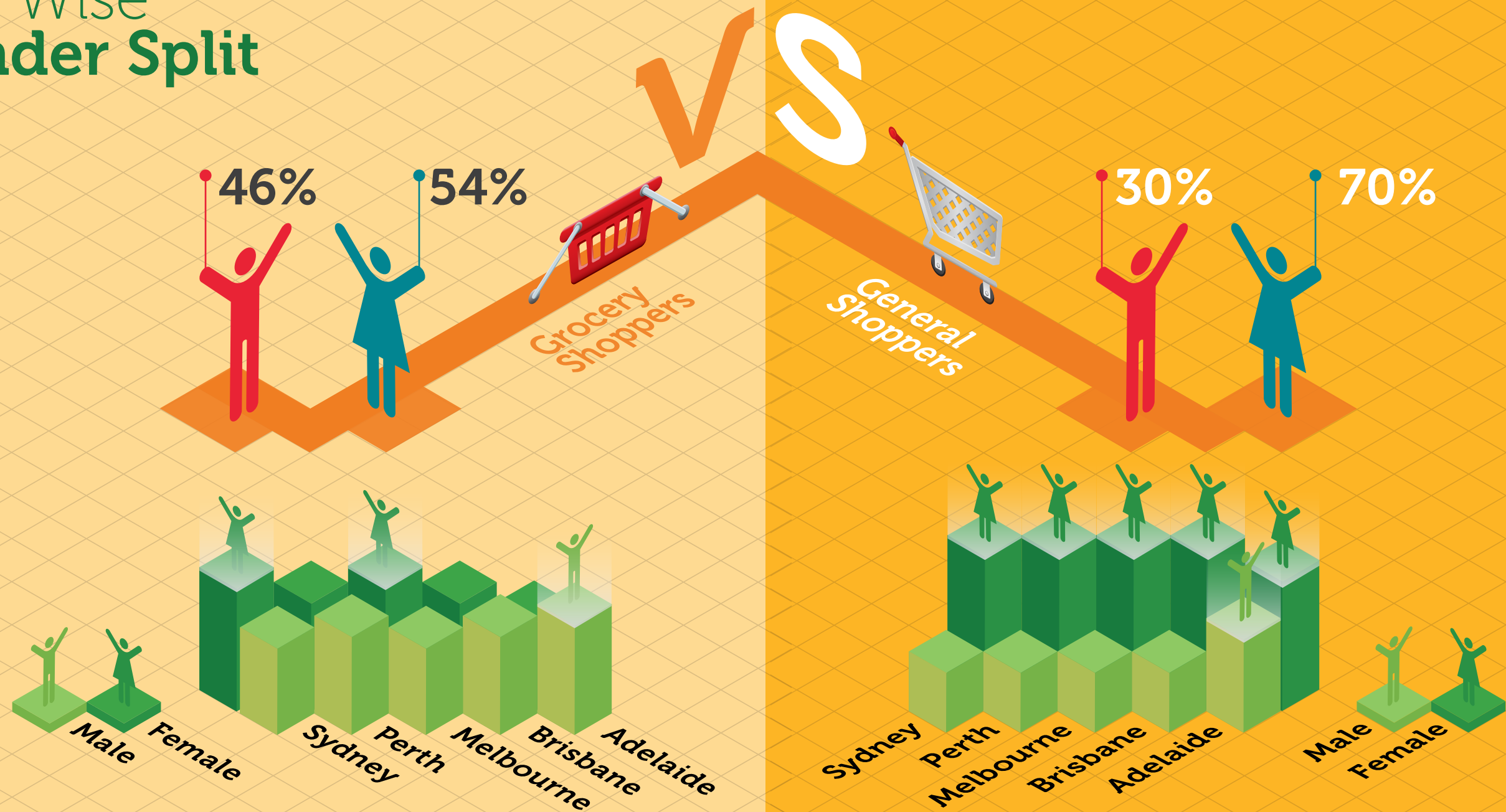
Male  Female
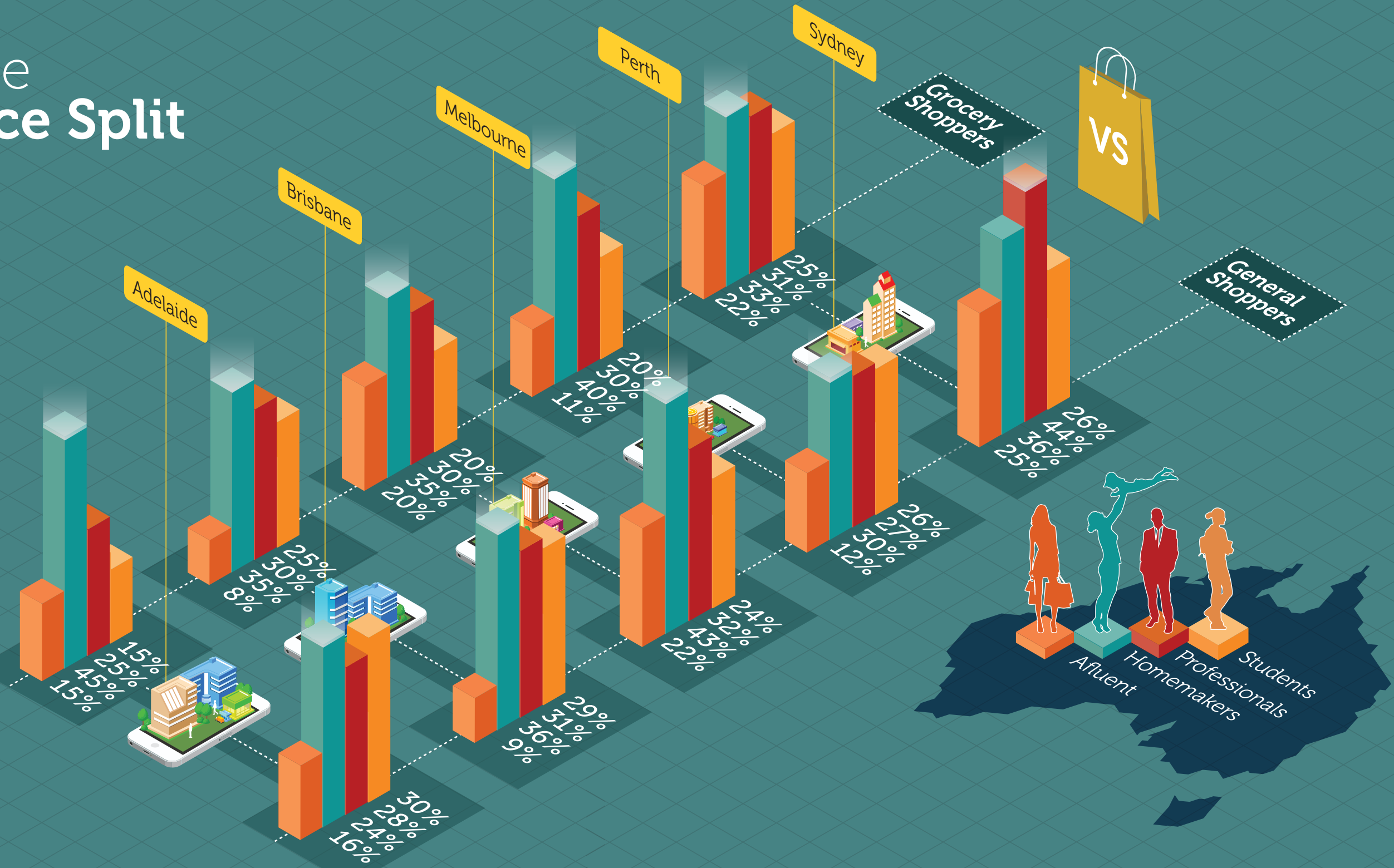
## 30% higher Females go for General Shopping compared to Grocery Shopping

- Females are in the majority bucket for both General & Grocery Shoppers. The skew is much larger for General Shoppers, where 70% of the shoppers are Females.
- Adelaide is the only exception, and sees higher percentage of males shopping compared to there counterparts in both categories.

# City Wise Audience Split

**Adelaide**
- 15%
- 25%
- 45%
- 15%

**Brisbane**
- 25%
- 30%
- 35%
- 8%

- 30%
- 28%
- 24%
- 16%

**Melbourne**
- 20%
- 30%
- 35%
- 20%

- 29%
- 31%
- 36%
- 9%

**Perth**
- 20%
- 30%
- 40%
- 11%

- 24%
- 32%
- 43%
- 22%

**Sydney**
- 25%
- 31%
- 33%
- 22%

- 26%
- 27%
- 30%
- 12%

**Grocery Shoppers**

**VS**

**General Shoppers**
- 26%
- 44%
- 36%
- 25%

Affluent  Homemakers  Professionals  Students

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## Homemakers & Professionals are top Audiences shopping across cities

**Grocery Shoppers:**
Melbourne & Sydney have higher Affluent going grocery shopping, while Adelaide & Perth have higher Homemakers doing groceries ; compared to other cities

**General Shoppers:**
Melbourne has Homemakers as the top audience where as Professionals are the top audience for Sydney. Melbourne & Sydney have almost 2x affluent shopping compared to their counterparts. Sydney has around 1.5x Professionals doing General Shopping compared to other cities.

# Purchase trends
## Week Wise

Adelaide sees high grocery shopping in Week 1 compared to the remaining month.

Week 2 sees a slight spurt, particularly in Melbourne & Perth.

Slight deep in Week 4

Week 2 is a popular week for Shopping.

Adelaide & Brisbanesee a dip in General Shoppersin Week 3 & 4.

35%
30%
25%
20%
15%
10%
5%
0%

Week 1
Week 2
Week 3
Week 4

Sydney
Perth
Melbourne
Brisbane
Adelaide

**Grocery Shoppers**

**VS**

35%
30%
25%
20%
15%
10%
5%
0%

Week 1
Week 2
Week 3
Week 4

Sydney
Perth
Melbourne
Brisbane
Adelaide

**General Shoppers**

Melbourne, Sydney & Perth have a comparatively even trend. Week 2 is a popular week for Shopping

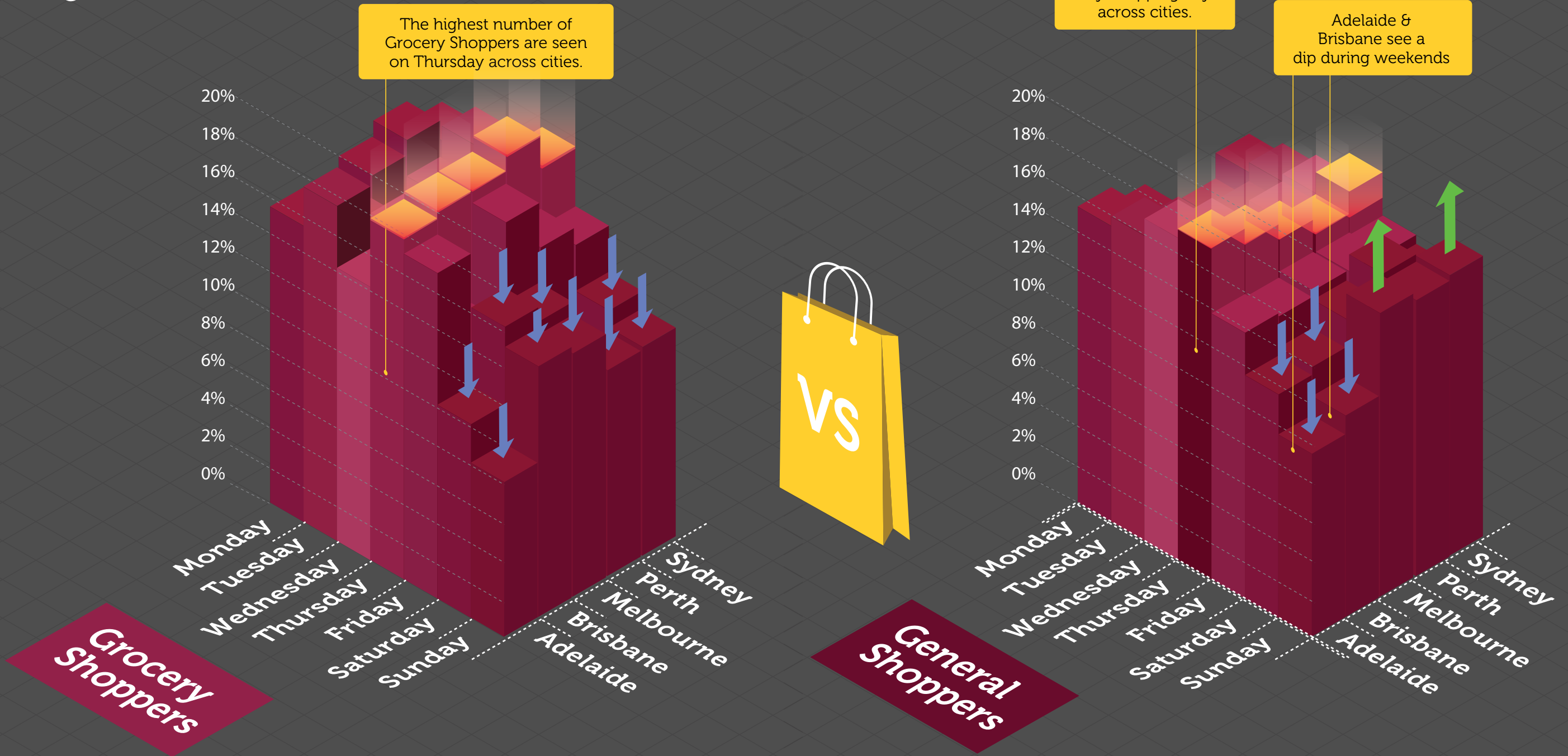## Second week of the month is the Preferred Shopping Week

**Grocery Shoppers:**
Grocery shopping trend is evenly spread across the month, but sees a slight deep in Week 4. Week 2 sees a slight spurt, particularly in Melbourne & Perth. Adelaide sees high grocery shopping in Week 1 compared to the remaining month.

**General Shoppers:**
Adelaide & Brisbane see a dip in General Shoppers in Week 3 & 4. Melbourne, Sydney & Perth have a comparatively even trend. Week 2 is a popular week for Shopping.

# City Wise
# Day Trends



The highest number of Grocery Shoppers are seen on Thursday across cities.

Thursday is the key shopping day across cities.

Adelaide & Brisbane see a dip during weekends

20%
18%
16%
14%
12%
10%
8%
6%
4%
2%
0%

Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday

Sydney
Perth
Melbourne
Brisbane
Adelaide

**Grocery Shoppers**

VS

**General Shoppers**

## Thursdays the most preferred day for Shopping

**Grocery Shoppers:**
The highest number of Grocery Shoppers are seen on Thursday across cities.
Weekends see a drop compared to Weekdays.

**General Shoppers:**
Thursday is the key shopping day across cities. Adelaide & Brisbane see a dip during weekends, whereas consumers in Melbourne & Sydney like to go shopping on Sunday

# City Wise
# Time Preference

**Grocery Shoppers**

**VS**

**General Shoppers**

Sydney
Perth
Melbourne
Brisbane
Adelaide
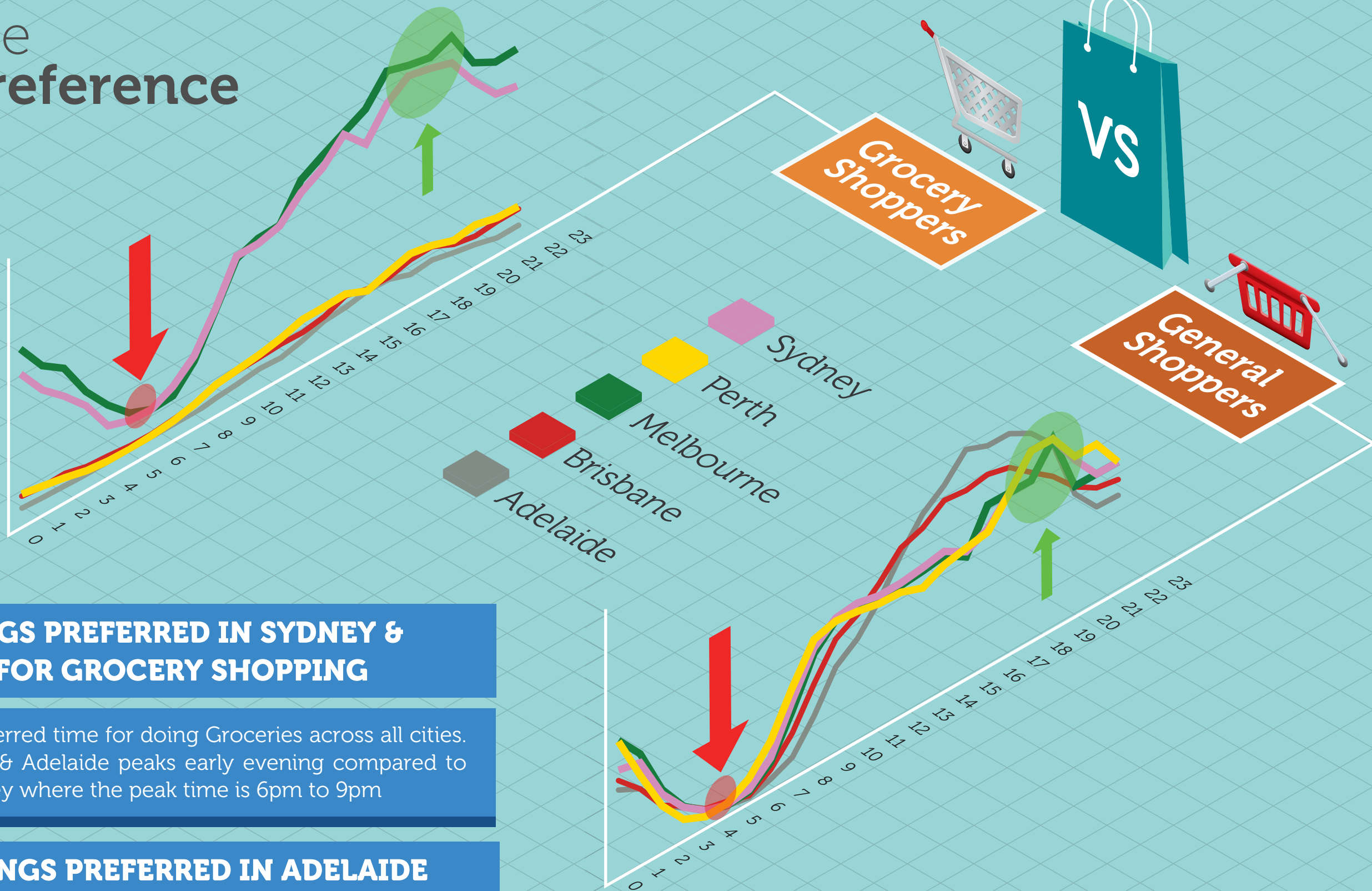
**LATE EVENINGS PREFERRED IN SYDNEY & MELBOURNE FOR GROCERY SHOPPING**

Evening is the preferred time for doing Groceries across all cities. Shopping in Perth & Adelaide peaks early evening compared to Melbourne & Sydney where the peak time is 6pm to 9pm

**EARLY EVENINGS PREFERRED IN ADELAIDE & BRISBANE FOR GENERAL SHOPPING**

Shopping time peaks in the evening across cities, and it's a relatively flat trend during afternoons. Adelaide & Brisbane sees the peak during early evenings, whereas for the remaining 3 cities, the peak comes a couple of hours later.

www.adnear.com

# Grocery to General shopping
# Trend for affluent shoppers

Perth **7%**

Adelaide **6%**

Melbourne **10%**

Sydney **14%**

Brisbane **3%**

**Major uplift seen in Affluent Shoppers in Melbourne & Sydney as we move from Grocery to General Shopping**

The percentage of Affluent Shoppers increases as we move from Grocery Shoppers to General Shoppers. There is 14% rise in Affluent General Shoppers compared to Affluent Grocery Shoppers in Sydney and 10% rise in Melbourne.