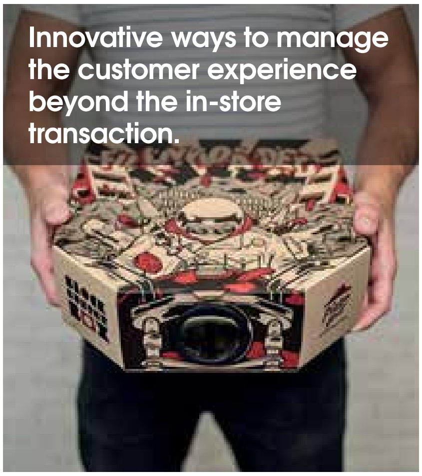
Issue 24, 2015

What's inside...

in-store insights

Dedicated to enhancing the total shopper experience


Smartphones are becoming increasingly central to multiple aspects of the path to purchase.


Innovative ways to manage the customer experience beyond the in-store transaction.


Shoppers and industry experts explore what mobile phone shops have in store.

Compliance is big business and a critical function in any successful in-store campaign.


The ease with which some accept and adopt statistics as 'fact' is worrying.

POPAI UK & IRELAND

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Issue 24

EDITOR'S WELCOME:

It gives me great pleasure to welcome you to Issue 24 and the new-look In-Store Insights. It has been six years since I first helped to launch, and sat down to write, the first issue of *In-Store Insights*. Over that time, the publication has continued to evolve and grow, and as 2015 drew to a close, we felt the time was right for a fundamental review of the publication, as POPAI continues to advance knowledge and understanding within the industry.

We have revised the format of the publication with the intention of providing a space for insight, analysis and research that is relevant, challenging and includes a diverse range of perspectives, critical commentary, reviews, and theoretical contributions.

Our revised format has been developed with the aim of publishing high-quality research and expert knowledge on major industry topics that will bring practical benefits to our readers, to help improve knowledge and skills, inform discussions, presentations and projects, and underpin the industry's relentless quest for improving effectiveness at the point-of-purchase.

We have placed a stronger emphasis on delivering insight, analysis and research that is related to the shopper's path to purchase, as well as being more representative of the wealth of resources that exists within the industry, as we're conscious that many of the day-to-day in-store challenges require practical insight to help inform solutions.

The aim is to bring all this together into one place to create a series of standalone journal-style reports to help you better meet the challenges of modern retail marketing. This open-minded stance towards how we compile our reports means that we will tackle topics of interest in real depth in a way that demonstrates authority, impartiality and practical usefulness.

Ultimately, the new format *In-Store Insights* will be focused on bringing you more fundamental and practical insights and research from POPAI and a wealth of other industry sources, as well as sharing recommended best practice through educated analysis of existing case studies. *In-Store Insights* will continue to be published four times a year.

We hope you enjoy this new-look *In-Store Insights* and find it informative.

Marc Baker
Editor

What's inside...

Get in touch. We're always keen to hear your views.
Email editor@popai.co.uk

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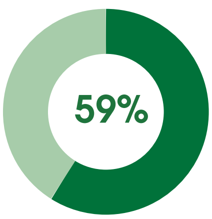
CONNECTED SHOPPERS

According to research, 60% of shoppers have used the internet or apps on their mobile phone in a retail store[1], 13% of UK adults have now made a mobile payment in-store[2], while 40% have made a mobile commerce purchase with their phone[2] and 59% have browsed retailers' sites on their phone[2]. Retail is being steadily reinvented, with the smartphone increasingly becoming central to multiple aspects of the path to purchase.

In its latest report, Deloitte suggests that: 'The mobile offer should be part of an integrated, consistent retail experience that spans all channels, digital and physical, that a shopper may wish to use.' It's a view that POPAI UK & Ireland has consistently promoted in relation to all investment in shopper technology. As with the arrival of online retailing, mobile will become one of several channels serviced by retailers, rather than the sole interface. Of shoppers who say they enjoy the task of shopping, 61.7% say they prefer to shop online compared to 48.1% in-store[3]. Most likely, this could be due to issues of convenience. For probably the same reasons, shoppers who say they mostly dislike shopping in general still show a marked preference for shopping online over in-store.



of those using a smartphone in-store take photos of fashion as a reminder

Source: Shoppercentric

Mobile first shopping

Mobile is starting to make up a large percentage of retail traffic – we're now living in a mobile world. Since shoppers are seeking out information and finding products on their phones more than buying, many retailers have started rolling out functions to keep those products at the top of shoppers' minds.

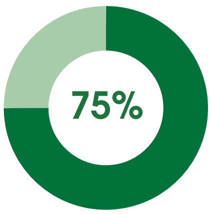
In the US, retailer Walmart helps shoppers to build 'wish lists', created in its mobile app. The introduction of the app has seen a 50% jump over last year as shoppers go to their phones, find products and inspiration, and save items they browse for later. Last year, during the weekend of 13 Friday November – a day after Walmart's Black Friday deals ad came out – the wish list creations saw a jump of 15%. Walmart is also projecting that this year, mobile will account for 75% of its online holiday traffic, and is hoping to see 210 million visits to its mobile app throughout the holiday season. Research has shown that when you have a set group of purchases in front of you, your mind is less likely to wander to another retailer.

Product recognition technology is another way to keep shoppers focused, as it enables people to find items when they are in a hurry, allowing them to return to the store or a retailer's website later to complete the purchase. In the US, department stores and big-box retailers like Macy's and Target are also using their mobile apps to help shoppers navigate actual store layouts, whilst UK retailers are also experimenting with such technology.

However, according to Deloitte[2], shoppers are not yet really vying for self-help mobile technologies. When asked to select which ones they wanted to use, the top two were price checker (57%) and self-checkout lanes (41%). 21% said 'none'.

Which shoppers are using mobile in-store?

According to the latest Shoppercentric report[4], there are clear divisions beginning to emerge in terms of gender, demographic and geographic profiles of connected shoppers. 53% of females have used a smartphone for shopping in the last month, compared with 47% of men. ABC1 shoppers are far more likely to use apps for shopping - 62% compared with 38% of C2DE. In terms of geographical location, the areas of the UK with the highest percentage of app users may come as a surprise to some: shoppers in the north of the UK are most likely to have used an app to shop (24%) followed by those in the Midlands (19%). Users in the southeast followed in third place, with 18%. Interestingly, just 17% of London smartphone users utilised apps when shopping[4].



of shoppers believe that buying online is now the fastest and easiest way to purchase goods

Source: POPAI UK & Ireland

Source: Global Survey, Consumers activities with mobile phones in stores, GfK 2015, © GfK

Source: Ofcom, CMR Report, 2014 © Ofcom

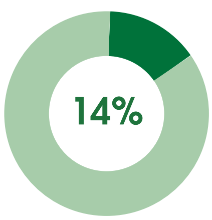
Connected shopper behaviour

In terms of frequency of shop, online shows a similar trend to in-store shopping with similar main shop and top-up shopping frequencies. Almost a quarter of all shoppers are shopping online several times a week.

This summer, research agency Shoppercentric, with support from POPAI UK & Ireland, launched its own study to examine how UK shoppers use both digital and traditional touchpoints within the purchase journey, conducting more than 1,000 UK shopper interviews and two focus groups of shoppers (aged 16+) who own a smartphone and who use their device as part of the purchase process.

According to the research, on average smartphone owners use 'five different touchpoints as part of their shopping habits, including shops, online, smartphones etc.' And whilst 40% of shoppers say they still want to see traditional in-store displays[1], it seems that P-O-P displays have become embedded in the mind of the shopper and are therefore accepted as 'the norm' – many shoppers now find it difficult to appreciate the difference between a high profile P-O-P display and subtle on-shelf promotional displays – unless it is exceptional.

The way in which shoppers connect with retailers has changed significantly in the past year and is set to continue to evolve at a rapid pace. However, the agency's research signals a cautionary note against jumping on the innovation bandwagon, instead stressing the importance of making sure that, as a marketer, you understand whether that innovation will ease the path to purchase or whether it will ultimately act as another point of frustration for shoppers. After all, what does it mean to be connected, from the shopper perspective? And what more could those working in or with the retail sector do to make being 'connected' truly worthwhile for shoppers?



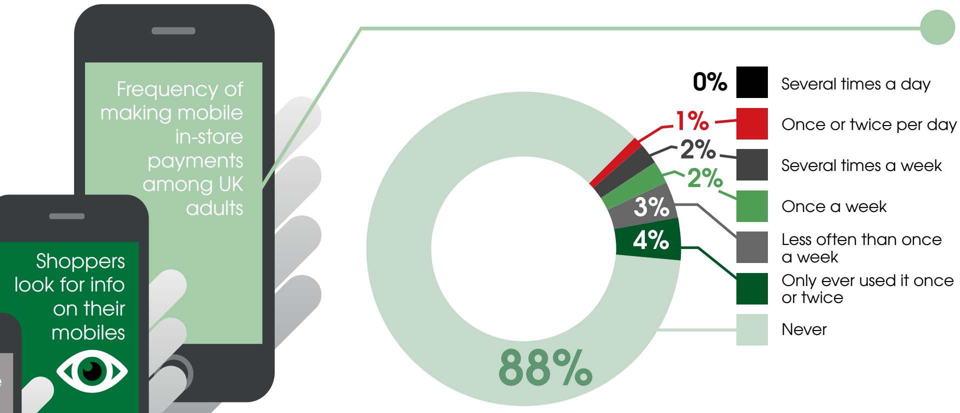
of all shopper age groups still believe that in-store is better than online shopping for price competition

Source: POPAI UK & Ireland

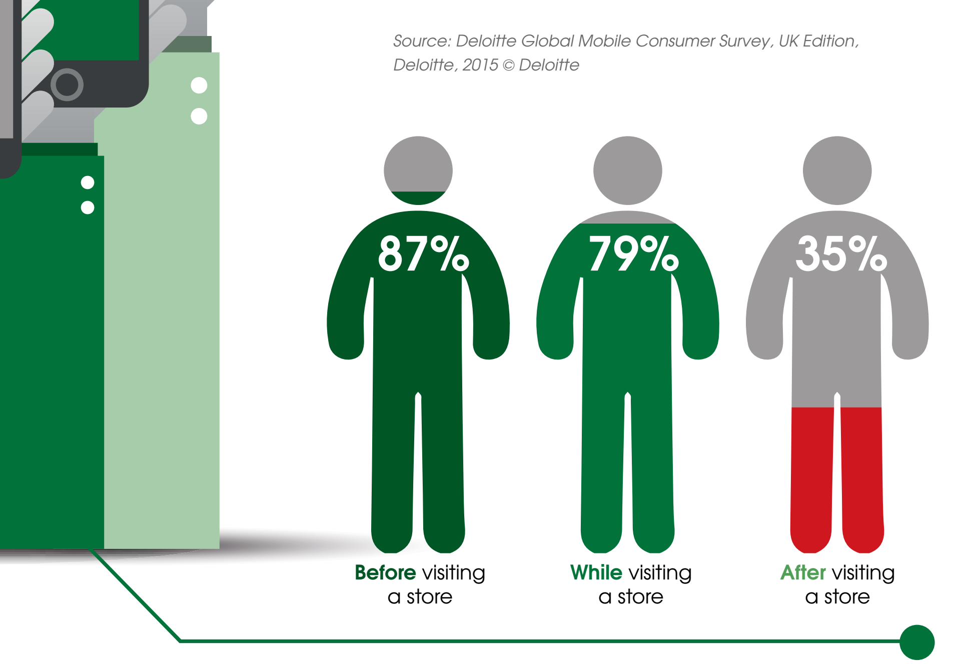
In-store, smartphone users typically utilise the devices for sharing ideas the most (47%) followed by comparing prices (29%) and reviewing product information (20%). Interestingly sharing photos, taking pictures as a reminder, store location and browsing (with no intention to purchase) were all cited by 17% of shoppers[4].

Showrooming

Store teams and in-store displays are no longer regarded as prime sources of product information by shoppers. The 'showrooming' shopper is typically visiting the store for the look and feel of the product or to get usage ideas, and no longer for product information. Overall, some 14% of shoppers

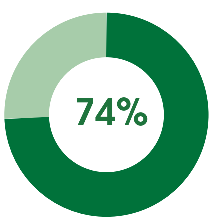


Source: Deloitte Global Mobile Consumer Survey, UK Edition, Deloitte, 2015 © Deloitte



Source: Digital Impact on In-Store Shopping: Research DeBunks Common Myths, 2014 Google © Google/Ipos MediaCT/Sterling Brands

interviewed admitted to the practice of 'showrooming', with clothing being the most favoured category. It suggests that retailers need to accept this shopping trend and to guide the in-store shopper to the retailers' own sites in order to secure the sale, regardless of the channel. This is a technique successfully being pioneered by Currys/PC World. Health and beauty products are mostly researched and purchased in-store only, suggesting that price is less of a driver for this category. Conversely, holiday and hotel bookings are primarily researched and purchased online. Pharmacy (over the counter) is least likely to be researched or purchased online although the NHS's push towards online prescriptions may encourage shoppers to move further towards online product research and purchasing.



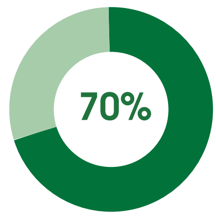
of shoppers believe online is now the best source of product information

Source: POPAI UK & Ireland

'Peak' performance online?

Delivery costs and extended delivery times are still given as the main reasons to avoid online shopping. As key trading periods such as Black Friday have highlighted in recent years, online shopping often has a very visible fallibility 'at peak', with some retailer websites struggling to cope with high traffic demand. Whilst the likes of Amazon are now providing the kind of delivery convenience that can match, and sometimes even better, what shoppers are able to achieve by taking the time out to visit the physical, many retailers remain some way off achieving a fast, reliable alternative as Black Friday 2015 once again showed – with of the UK's largest retailers stating on its website that 'due to high demand, shoppers should allow 5-7 days for deliveries' via its click and collect service, whilst its Express delivery was temporarily unavailable.

Some retailers have started to add a click and collect charge for orders totalling less than minimum spend. Why would shoppers want to pay more to collect from the store when they will, in all likelihood, pass the item on the shelf as they walk through the store? According to POPAI UK & Ireland research, 26% of shoppers say unhappiness over delivery costs or delivery delays would result in them not making the final purchase online[1].



of UK shoppers have a smartphone

Source: Shoppercentric

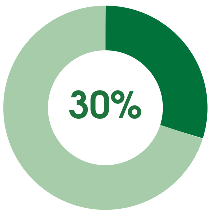
Speed of connection

Is adoption of mobile technology for shopping really growing as fast as some would have us believe? Many industry analysts believe, yes. Of those who don't regularly use a smartphone as part of the purchase process, 36% expect to in the future[4]. One in three smartphone owners have shopped using an app, however only one in ten of all smartphone users regularly use apps as part of the purchase process[4] – suggesting that retailers are failing to provide the right content. Equally worryingly, whilst Google claims that 42% of shoppers use mobile search while in-store, it suggests two out of three do not find the information they need and 43% leave a store frustrated[5].

Despite the media headlines regarding advances in technology and the need for brands to continually invest in the latest tech-driven solutions in order to improve the retail experience, in truth many shoppers still have difficulty keeping up with it. Although QR codes, augmented reality, iBeacons and NFC are often seen as representing the brave new frontier, the most successful recent technological evolution in-store in the last few years remains self-service tills. According to the POPAI survey, 60% of shoppers have used them at least once[1]. In reality, other forms of shopper technology and interactive P-O-P displays still have a long way to go before they go mainstream.

All change?

Many shoppers are clearly comfortable with their present chosen methods of shopping, with over 50% believing they will not change their split between online and in-store in the near future[4]. However, a substantial proportion of shoppers (37%) accept that they will be shopping more online in the future[4]. This is a considerable challenge for the traditional brick and mortar store format. What it highlights is the need for retailers to create alternative and relevant reasons to leave the home and visit physical stores. At present, today's shoppers are seeing the rough edges that indicate that we're not quite there yet.



of smartphone owners have used their smartphone to shop in the last month

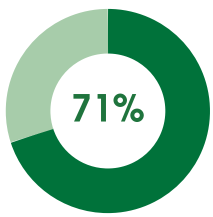
Source: Shoppercentric

The opportunity is there with mobile to offer personalised and contextually relevant offers that are personal to the shopper, just as you experience online. As the 2014 report published by Google[4] suggests, shoppers now want 'informed, customised experiences' when they shop in-store. Google's study found that 69% of shoppers used physical stores for information during different phases of the purchase process, while 64% said they would be more likely to shop in stores that made recommendations for specific products to purchase. Such findings validate the strategies of retailers such as Waterstones – which has introduced in-store messaging that focuses on 'staff-recommended reads' – and others to provide more 'personalised' purchase guidance to shoppers.

Understandably, retail brands are keen to perfect a more connected shopper experience. Mobile websites, apps, social media functions and more will be used by shoppers along the path to purchase to the final point-of-purchase. For retailers, the biggest hope is that their own integrated retail experiences will be enough to command attention, so shoppers don't seek out competitors' products.

Our research

In the 'WindowsOn…Connected Shopper report', POPAI supported research by insights agency Shoppercentric to investigate the route to purchase in different categories and to what extent shoppers researched their purchases in-store but made the final purchase online, as well as comparative shopper attitudes between shopping online and in physical stores, and towards traditional retail display in-store.



of in-store shoppers who use smartphones for online research say their device has become more important to their in-store experience

Source: Google/Ipsos MediaCT/Sterling Brands

Sources:

1 On device research, Mobile in the Retail Store, 2012

2 Deloitte Mobile Consumer 2015: The UK cut - Game of phones

3 POPAI UK & Ireland, POPAI Connected Shopper Survey, September 2015

4 Shoppercentric, 'WindowsOn… Connected Shoppers' report, July 2015

5 Google, Digital Impact on In-Store Shopping, October 2014

Expert's view

Simon Hathaway, *president and global chief retail officer Cheil Worldwide*

Technology that will become popular with shoppers is that which delivers on three things: convenience, enriched experience and value. If you look at how many museums and art galleries are now using apps and beacons to enrich their visitor experience, you can see the opportunity we have to transform the retail experience. Technology is breaking down the barriers of physical and online, bringing both together to offer the perfect shopping experience, so the biggest word in retail today is 'convenience'. Convenience is about making shopping easier, faster and simpler – tech that helps to speed up payments or processes in the retail environment, like the Starbucks app. But often, much of this is invisible to the customer, for example stock availability solutions. Enrichment is about a better experience in-store. The best retail experiences aren't fun or immersive – it's about giving shoppers an experience that's relevant and convenient to their needs. H&M on Times Square stays open until 1am. It does this because it knows that if it wants a young female audience, it needs to work around their schedule. They want to go out with friends, and they also want to shop with friends – and H&M has brought this together in a simple, but relevant way. Experiences that are customer-centric will trump any that try to stand out just because they are fun. There will always be a clear role for bricks and mortar retail. People will always want to go to a bank or travel agent because they need that face-to-face communication, we just don't need quite as many stores.

1 in 4 consumers who avoid stores do so because of limited awareness of nearby stores or the risk of items not being available

Source: Google/Ipsos MediaCT/Sterling Brands

IN-STORE IMPLEMENTATION

Put simply, compliance is about getting the basics right: correct promotional implementation of in-store display, visibility and product availability. Brand owners and retailers are acutely aware of the negative impact that poor compliance standards can have on brand delivery and product sales. As a result, modern P-O-P implementation is big business and a critical function in any successful in-store campaign.

According to the most recent POPAI UK & Ireland industry study[1], around 20% of P-O-P budget is currently allocated to campaign implementation, double the figure that brands spend on design.

In an effort to grab the attention of shoppers, display units are increasingly becoming more elaborate and expensive. As the complexities of installation have increased, so too has the challenge of compliance.

At a glance: top 5 reasons for poor compliance

- Vague and ambiguous implementation instructions
- Display designs not fit for purpose or in a way that aids compliance
- Fragile components that break
- Overly complex planograms
- Failure to check compliance after installation

Not surprisingly, it is the larger and more complicated display categories that require the services of specialist P-O-P installation companies. Conversely, simpler P-O-P, such as alcohol glorifiers for the on-trade and impulse food, is more likely to be installed by brand field teams or retail staff.

'The factors for non-compliance haven't changed much, although the appetite for brands and retailers to achieve higher compliance across their estate has increased.'

Momentum In-store

When it comes to compliance, every retail category presents its own unique challenges. As a specific example, any P-O-P display unit that houses smaller 'fiddly' items like stationery or health and beauty products, often presents a tougher challenge to keep compliance levels high. Also, simply keeping on top of compliant merchandising and ongoing maintenance is most demanding in retail units with heavily-shopped items, due to high levels of footfall and general wear and tear.

Potential vs reality

Most retailers and stores believe they execute better than they actually do. Brands report that nearly all their display equipment finds its way to store either through retailers' own distribution systems or via installation companies. In other words little, if any, remains in storage, never to be used.

Compliance figures of 90% and higher are often quoted around projects, although research shows the true figure is significantly below this. According to one study, the average percentage of in-store campaigns that achieve full compliance in some developed retail markets can often be as low as 29%[2]. Furthermore, only 21%[2] of retailers independently monitor campaign compliance, and 79%[2] just 'assume' in-store displays are being executed. Factors such as a lack of monitoring, lack of responsibility, and over-complexity in the retail merchandising process contribute to this.

Thankfully, in the UK the figure is much lower. Installation companies say they are asked to check compliance at least some of the time on 88% of projects[1]. However, the latest POPAI Industry Study also highlighted that as much as 30% of all P-O-P activity is still never or rarely measured[1]. When campaigns are measured for compliance, it is unlikely that it will always involve a full audit of the entire installation. It is far more likely that only the stores with the highest product turnover will be audited, probably in the region of 20%[1] of all those who receive display. Alternatively, periodic checks may be made every three to six months to assess current trends, and smaller brands may be limited to head office staff and account managers checking local stores.

Beyond price

Specialists in the sector report that the most important determining factor when considering installation and compliance activity, by far, is price. One installation company summed up the market requirements as 'how cheaply can you do a lot of things and how quickly?' But some believe that price and service are cyclical and that after several years of reduced quality and service in the pursuit of lowering costs, clients are now starting to realise the benefit of paying a little extra – although there is the potential for this to be eroded again if pressure on budgets were to return.

Beyond 'launch and leave'

While many may laud the precious time, effort and money that has been spent on launching the latest new in-store campaign, it is all too easy to fall into the 'launch and leave' trap – failing to support it adequately in the post-implementation stage. The commercial impact of such neglect should not be ignored, with campaigns often requiring sustained, ongoing investment. Failure to do so will ensure they never fulfil their true ROI potential – it's as simple as that. Success therefore is not about just getting it right in a few stores. Instead, promotional campaigns must be rolled out repeatedly and consistently, sometimes across hundreds of stores and often within a very short time frame.

Out of stocks

Stocking displays correctly against planograms, in a timely manner, is an important element of in-store compliance that is often overlooked. Past industry studies have found that shoppers feel let down by poor availability on promotions. According to some analysts, those who don't carry enough promotional stock risk 'destroying faith in stores and brands' and 'damaging the bottom line'.

More than three quarters of shoppers who make a special trip to a supermarket to buy an advertised promotion find an empty shelf, according to The Institute of Promotional Marketing. And where does the blame lie for this, in the eyes of the shopper? With the retailer, say many shoppers (64%), whilst one in seven blamed the brand manufacturer[3].

Despite the belief that the rise of discounters has negatively impacted brand loyalty, the promiscuous shopper is not a new phenomenon – especially when it comes to the fallout resulting from poor compliance. As far back as 2009, a study commissioned by SCALA Consulting found that half of shoppers questioned said they would simply buy an alternative,

1

2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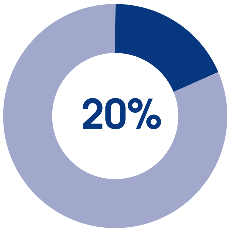
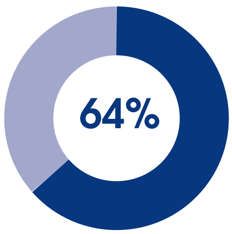
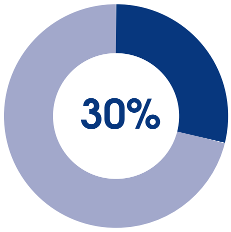
P-O-P budget currently allocated to campaign implementation



Shoppers blame retailers for poor promotional compliance



P-O-P activity is still never or rarely measured



POPAI Industry Study, 2013, POPAI UK & Ireland © POPAI UK & Ireland

if their favourite brand could not be found in-store[3]. Of greater concern perhaps was the report's finding that a third of retailers did not have on-shelf availability as a key business objective.

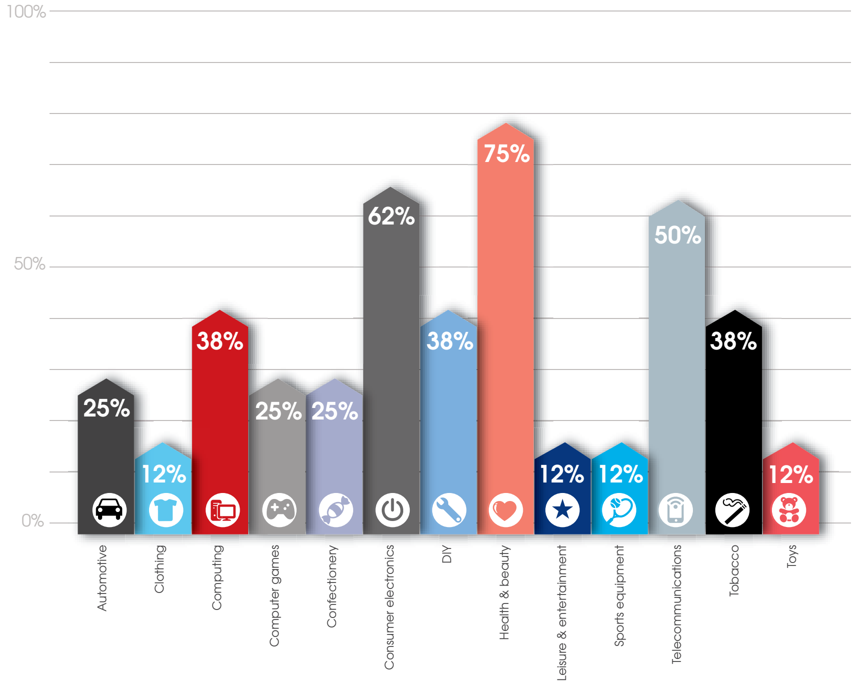
Amplifying the problem

Getting in-store compliance wrong always has the potential to leave retailers and brands red-faced, usually in terms of explaining why an in-store promotion has performed worse than expected. But a recent case, which saw a leading grocery retailer come under fire on social media for its management of a Ramadan promotion, perhaps illustrates better than any other how quickly problems can be amplified by poor compliance and the avoidable interventions of potentially well-intentioned but ill-informed retail teams. The decision by store staff, albeit in a single store location, to display Smokey Bacon Pringles on a promotional display for Ramadan attracted scorn on social media and forced the retailer into a very public apology – potentially damaging for customer relationships, its media profile, and the bottom line.

Technology-driven

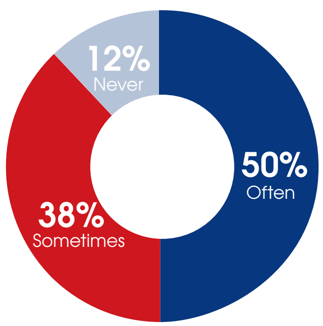
Historically, not having a detailed overview of fixturisation that exists within retail store estates has been a common issue for retailers and brands alike, and has had a negative impact on their ability to plan pre-store development activity with any great precision. However, innovations in technology are now

Percentage of installation companies engaged by category



POPAI Industry Study, 2013, POPAI UK & Ireland © POPAI UK & Ireland

How often installers are asked to monitor compliance post installation



POPAI Industry Study, 2013, POPAI UK & Ireland © POPAI UK & Ireland

enabling store development programmes to be 'completed' within microscopic tolerances, long before the physical work in-store actually begins. Innovation is delivering valuable savings too.

Traditional methods of collecting store data to support development programmes were not only costly in terms of the financial investment and human resources needed, but also the time required to complete such tasks. Store data can now be captured through real-time on-site surveys, providing in-depth retail critiques that give clarity on key issues and maximise effective decision-making, from greater visibility of fixture assets, to operational constraints and informing P-O-P ordering.

But it doesn't stop there. It's not only grocery retailers that now operate 24/7. Advances in real-time reporting are enabling a growing number of marketers to access live updates on progress in-store, from the comfort of their office, or at home out of hours. As well as the host of off-the-shelf reporting packages that are now available to installation specialists, those pushing the boundaries within the industry are now investing in their own IT infrastructure and innovative reporting apps to digitally monitor compliance to meet individual client needs. The result is authoritative and trusted feedback on what is happening in-store, complete with live statistics, photography and benchmarking of retail standards. Being able to cascade information on in-store campaigns quickly and effectively across an organisation has never been easier.

Resurrection of semi-permanent P-O-P

Card has become more popular for semi-permanent display over the last five years. But the reduction in oil prices is, once again, bringing plastic into consideration for brands evaluating P-O-P tools, and could see some switching from temporary cardboard displays to more semi-permanent solutions. Recently, some FMCG brands have said that plans to increase the volume of more semi-permanent P-O-P display used within grocery retail may have a knock-on effect on installation requirements. The argument is that one permanent display can take the place of many temporary displays; however promotion changes are difficult to manage, which will surely place a greater emphasis on the need for expert third party support.

A new definition of compliance?

In the quest for a more connected shopper experience, there is one noticeable absence from many current discussions around compliance. Continued investment in digital in-store communication often remains outside the remit of established campaign implementation specialists. Indeed, there are some within the industry who believe that centrally-controlled digital content eliminates non-compliance. It doesn't. There are many examples of poor digital compliance that can be seen when out shopping – from error messages and frozen content, to screens that are not even switched on. The reality is that retail teams do not have the knowledge and skills to attempt to rectify the problem, but they can report it. The maintenance support and service level agreements that the retailer or brand has in place to respond to such reports then becomes key – ensuring issues are solved efficiently and effectively, before they begin to impact negatively upon the customer experience.

Sustainability

Despite the focus on sustainability and recycling in recent years, industry figures suggest that installation specialists are asked to recycle existing display equipment on only 33%[1] of occasions. It is in the cosmetics category that the highest rate of recycling and reuse occurs. Companies report that this is becoming far more frequent and includes removing and recycling existing equipment irrespective of whether it is a different brand to that which they are about to replace it with or whether they originally installed it. Temporary display, being predominately card, is usually easy to recycle. Permanent equipment can be more time-consuming and costly. Usually this is because otherwise recyclable materials have been joined in such a way that it is difficult to separate them, preventing them going into a particular recycling stream. The situation is improving, but still occurs. Rather than being recycled, P-O-P is increasingly being returned to the manufacturer to be reused. This has been the norm for components for quite some time, i.e. faulty parts are removed and returned for repair and reuse. Recently though it has been the entire units which are being returned for reconditioning – examples being cosmetics displays and newspaper stands.

Expert's view

Tim Ellis,
head of business development
Momentum Instore

Top 5 challenges to achieving compliance

Secret of success

Effective in-store implementation is about making displays easy to implement, and that process starts right at the beginning of P-O-P concept development. A fantastic concept can fail if poorly executed, so it is important to work closely with all stakeholders involved to help effect placement, compliance and effective engagement at store level, to ensure continuous improvement of the design and implementation processes. It's easy to agree promotions and off-shelf presence at head office level – but success won't happen if we don't have proper buy-in to activity amongst store managers. 'All decision-makers need to be taken on the journey, not just the commercial teams at head office.' Those were the words of one brand marketer interviewed by *In-Store Insights* back in 2014. Often, people are guilty of assuming that if they provide information, it will be used and people will automatically understand it. This isn't the case. Managing every new campaign rollout places huge demands on project teams, and specialist and ongoing support is needed to make it work. Compliance is also not just about installing P-O-P correctly – it's about making sure that the right items are displayed and the wrong ones aren't even produced in the first place, saving time and unnecessary financial cost.

Images:

1 The AkzoNobel Dulux Mix Lab installation by Momentum Instore won Silver at the 2015 POPAI Awards - Image: © Momentum Instore/POPAI UK & Ireland

2 The Boots Instore Christmas project by CJ Retail Solutions won Gold at the 2015 POPAI Awards - Image: © CJ Retail Solutions/POPAI UK & Ireland

3 As much as 30% of all P-O-P activity is still never or rarely measured - Image: © CJ Retail Solutions/POPAI UK & Ireland

Expert's view

Mike Houghton,
group marketing director
CJ Retail Solutions

Following the journey from the designer's drawing board to store, there are five key areas that must all be aligned in order to achieve great compliance. Firstly, getting P-O-P installation experts involved early on in the process will help to ensure that the design is fit for the retail environment in which the product or promotion will be placed. Having the right knowledge and skills involved from the outset to provide recommendations to designers in terms of construction methods and size of displays is an essential part of making sure the installation process is as smooth as possible. It's obvious that the logistics of moving goods from warehouse to retail unit will always play a huge role in achieving a high compliance rate. Retail displays themselves can consist of a multitude of different elements, all of which are often delivered separately to stores for construction. By utilising just one central hub for each installation, every part of the display can be delivered in one go and walked into store, reducing the risk of parts going missing on location. Leaving the task to the retailer's shop floor team is a sure-fire way of missing your compliance target. Correctly trained teams and real-time reporting allows brands to instantly see installed units and feed back on any issues. Once installed correctly, the merchandising team takes over. Following all of the time and effort that goes into ensuring the previous stages are correct, you don't want to fall down at the final hurdle. Once designed, delivered, constructed and merchandised correctly, it is important not to forget that display units can stay within a store for an extended period of time. Compliance doesn't end on launch day. Creating and adhering to a robust maintenance schedule will keep displays looking their best week after week.

Sources:

[1] POPAI Industry Study, POPAI UK & Ireland, 2013

[2] Phillips, Foster & Boucher, POPAI Compliance Initiative Study, 2013

[3] Shoppernomics: How to Shorten and Focus the Shoppers' Routes to Purchase, 2014, Harper and Mullin.

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MOBILE PHONE SHOPS

For millions of UK consumers, the mobile phone has become the most personal, most coveted of products of all, always in reach. It has become so essential that as a nation we now look at our smartphones over a billion times a day. The first of our new series of shopper investigations explores mobile phone shops to see who comes out on top for retail standout, customer service, and satisfaction – plus find out what industry experts believe is in store for the sector next.

In partnership with Roamler

Our first shopper investigation, in partnership with retail analytics specialist Roamler, saw shoppers visit 100 mobile phone shops to see what reception they received when it came to the experience of shopping in a store.

Sector overview

The modern, touchscreen-based smartphone may only be eight years old but it is already the most successful consumer electronics device ever and more embedded in our lives than ever – 76% of adults in the UK now have one[1]. Globally, it outsells all tablets, PCs, televisions and video games consoles combined, from the perspective of either value or unit.

In the UK, the mobile telephone retailers industry is worth £2 billion[2], with the largest chain, Dixons Carphone, accounting for an estimated 59.2% of industry revenue, far surpassing the size of any of its competitors. Although continuing advances in product design and technology, as well as high-speed mobile connection, have fuelled consumer demand, these changes have not translated into the retail market. It remains a difficult trading environment, with revenue expected to decline at an annual rate of 6.5%. The mobile phone sector faces problems of slowing technological development, far too many stores and a lack of genuine innovation when it comes to delivering a compelling retail experience. These are the classic symptoms of mainstream maturity and many of the sector's issues are not going unnoticed by shoppers.

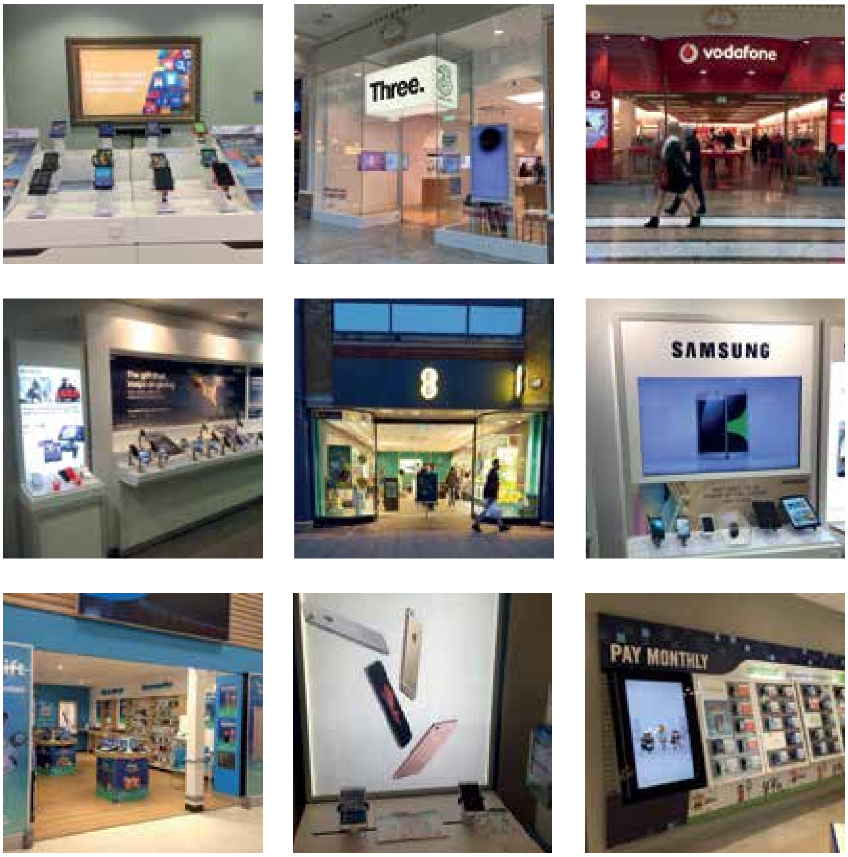
At a glance: barriers to purchase

- Navigating number of offers and promotions
- Lack of education around device benefits
- Non-contract device financing
- Network provider transfer process
- Getting out of a contract early

Satisfied customers?

The Which? shopper survey[3] published earlier this year saw EE mobile phone network shops named as the worst retailer in Britain, with a satisfaction rating of just 52%. Others in the sector fared little better. Vodafone was ranked 95th, with O2 listed 78th. The annual survey of 100 well-known high street names is the UK's biggest, with shoppers rating stores on their prices, store environment, customer service and the range and quality of products. The best performing in this sector was retailer Three, which achieved a position of 38th, and Carphone Warehouse at number 23.

As one industry commentator said: 'Stores need to focus on educating potential shoppers rather than pushing sales. If a retailer were to put people first it would prosper.' Such statements draw clear parallels with the proposition developed by automotive brand Rockar Hyundai when it launched its concept store in Bluewater Shopping Centre. It reinvented the traditional car showroom, with Rockar Hyundai's in-store staff – dubbed 'angels' – selected from non-automotive backgrounds. Focused on customer



Images: © POPAI UK & Ireland /Roamler

service rather than sales, they do not work on commission. In-store, each digital touchpoint was designed to empower the shopper with the details they need to make an informed purchase, as well as equipping the 'angels' with the tools to engage and advise effectively. After all, buying a new mobile phone or tariff plan can be a minefield and it can be very easy to get lost in the various offers and promotions.

Shelf life has declined by almost **50%** since 2005

Source: BrightStar Intelligence, Mobile trends report, 2014

Connecting with shoppers?

Our research revealed interesting data around use and visibility of retail display in-store within the sector, and it appears that some retailers are potentially deploying the same P-O-P tools with significantly different results. Within Vodafone, 33% of shoppers said they were aware of the retailer's freestanding displays, yet within O2 stores that figure dropped significantly, to just 6% of shoppers claiming to have seen its freestanding displays. Analysis of how easily shoppers were able to compare contracts appears to bear out the findings of the Which? survey, with Three coming out on top, closely followed by Carphone Warehouse.

With the Apple and Samsung iconic devices representing the top 10 contract smartphone spots which account for 60+% of total market share, the ability for all others to move any sizeable volume of product in the market is finite and ultra-competitive. A fact clearly reinforced by in-store visibility. Without exception, both brands came out on top in terms of standout within the retail environment, with Apple dominating in Three, EE, Tesco and Vodafone stores, and Samsung achieving greatest standout in Carphone Warehouse and O2.

Despite advances in retail display, designed to balance the need for shoppers to enjoy the real mobile experience as well as retail security, some shoppers still found current approaches frustrating. One commented: 'The handsets were available to touch, but they were all locked down, so you couldn't actually pick any of them up and see how they felt in your hand.' Other shoppers highlighted the continued need for retailers to ensure they have sufficient retail staff to support the purchase process, saying: 'staff were needed to make almost all of the handsets live.'

When it came to customer service, in-store experiences varied, with staff described as 'aggressively offering assistance' but also 'quick and very helpful'. Shoppers ranked retailers Three and O2 as being the most proactive when it came to responding to the presence of customers in-store. One customer said: 'I was never approached in-store while browsing' while another commented: 'All the staff were busy with other customers the whole time I was in the store, but none of them made eye contact with me, or said they would be free in a minute.' Some shoppers also made reference to the often overwhelming range and options that mobile phone retailers manage to squeeze in to even the smallest of retail footprints, with one commenting: 'For a small store, it had a lot of handsets…not conducive to browsing.'

'With the advent of wearable technology, mobile retailers can now provide shoppers with the chance to create a sense of who they want to be. This becomes exciting and it will be fascinating to see who, if anyone, grabs the opportunity.'

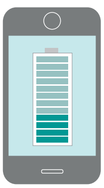
Future opportunities from trade-in

The second life of smartphones is set to become an increasingly important dynamic in the mobile sector. In 2007, when Apple first launched the iPhone, the average trade-in value of phones was £20[1]. Currently, the latest premium smartphones have a trade-in value of close to £400[1]. According to Deloitte, around seven million phones, mostly smartphones, could be traded-in with an aggregate value of about £900 million[1]. The rising residual value of some smartphone models has increased the likelihood of a second life for these devices. Deloitte estimates that in the year to May 2015 about 40% of second-hand

smartphones, or almost 13 million units, were either traded-in or handed down[1], and would therefore continue in use with a new owner.

For many shoppers, a second-hand phone will be an opportunity to own a high-end device that they could not otherwise afford. Smartphone brands may soon start marketing the potential future trade-in value of their models, similar to practices in the car industry. Retailers could offer superior trade-in rates and more shopper-friendly trade-in processes to lure users from other networks, or to encourage contract extensions. Deloitte points out that customers on tight budgets with a refurbished premium device may opt for a larger monthly data bundle than those with a brand new mid-range or budget device, resulting in this shopper group becoming an increasingly lucrative one for retailers. In the US, trade-in is now an established promotional strategy as well as a profit driver.

Financing is also going to become a key service offering with the other changes in the market. Savvy shoppers will compare various financing offers against each other to make decisions about their carrier, phone, and store. There are clear opportunities to expand the promotion of financing solutions in-store resulting in incremental growth in basket and profit.



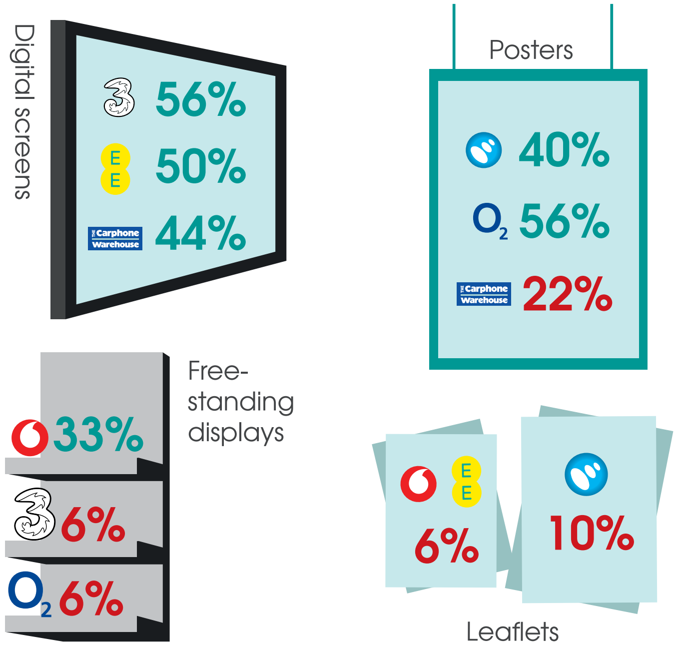
Mobile phones can last as few as

4 short months

on a retailer's shelf

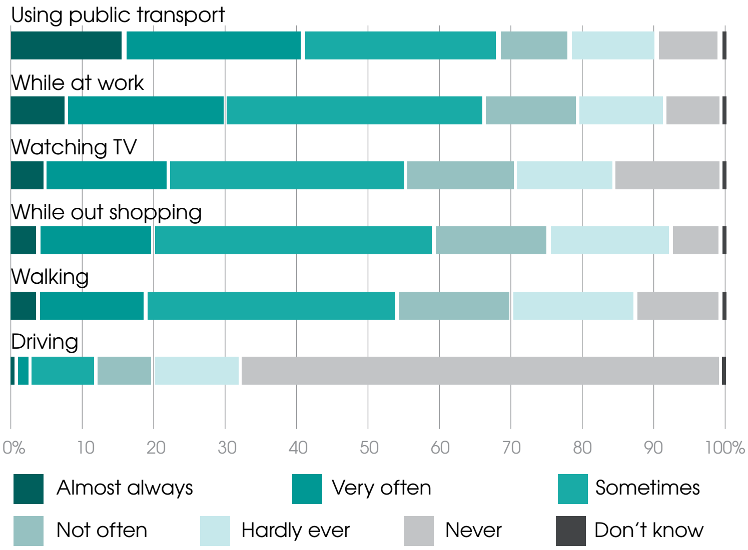
Source: BrightStar Intelligence, Mobile trends report, 2014

Most seen/least seen displays in-store by shoppers



Source: POPAI Mobile Phone Retailer Shopper Survey, 2015, POPAI UK & Ireland/Roamler

How often, if at all, do you use your smartphone while doing the following?



Source: Deloitte, Mobile Consumer 2015: The UK cut – Game of phones, 2015

Expert's view

George Wainwright,
partner & creative director
PWW London

Bricks and mortar retail for the mobile sector has been one of the last to evolve on the high street. Has anything really changed since the first Phones4U appeared? Phones4U was the story of a brand that happened to be in the right place at the right time. They nailed what they represented, but now times have changed. Unfortunately, from a technology brand perspective I don't think anyone is doing anything other than try to look like Apple. Dixons Carphone doesn't feel like anything new or innovative at all. The Samsung retail experience is one of the most disappointing around and yet probably has the most potential. Brands still don't seem to understand that Apple is not a mobile retail experience – it's a lifestyle brand. Their stores support their story. Others need to identify what their point of difference is, and then develop a retail experience that reflects this. Stand for something – it really is that simple. Android is doing a great job with its 'Be together, not the same' campaign, but fundamentally, when walking into a mobile phone retailer all of the brands are almost indistinguishable. Brands need to focus on what they do well and not on how to compete with the others. If they concentrate on this, people will start to believe in them and their proposition. BT could do something exceptional, as it is so much more than just mobile and this makes it a compelling brand. It can link your life together and you instantly get a sense of pride and ownership due to its heritage. If it can communicate the diverse offering it now has, and clearly demonstrate the benefit of a 'linked up' experience, then it could fly.

Expert's view

Dean Neill,
production manager
allen international

Since the demise and merger of many telecom 'challenger' brands, the retail experience in the sector has become quite generic and cost- and value-driven. It's all about data – how fast and for how much. The result is that the retail environment today has to work really hard if it is to differentiate over value-driven brands. True Corporation in Thailand has created an amazing 'Social Hub' concept that is the complete antithesis of Apple but energetic and buzzing with young people eager to share their stories through social media. Yes, retailers have to offer the leading products like Apple and Samsung to get more feet through the door, but they need to ensure their stores are visibly appealing and welcoming. As for the arrival of BT into the sector: it has a huge challenge on its hands in turning EE around and delivering true differentiation in the market. BT is not seen as an innovative brand, so its strategy will need to be well-placed. The market will expect BT to be heavily internally focused whilst they try and create a differentiation in the marketplace.

Our research

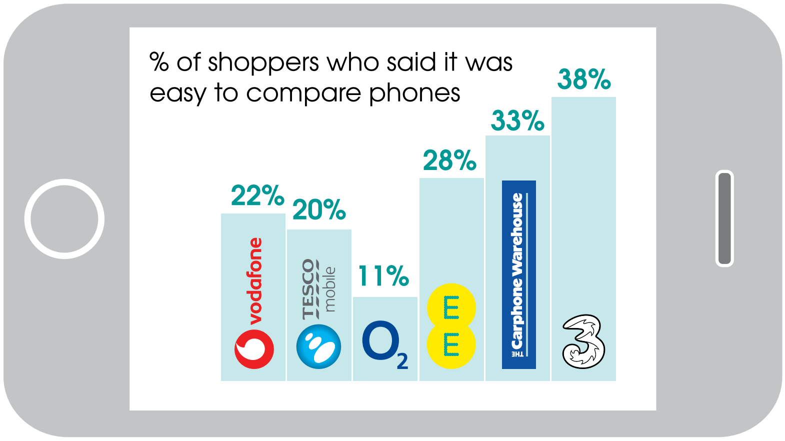
We asked respondents to visit 100 mobile phone stores in November 2015 and record the experience in-store. We asked them about their overall shopping experience, their experience of shopping for specific products, their perceived visibility of competing brands within the retail environment, and general observations regarding the use of P-O-P display.

Sources:

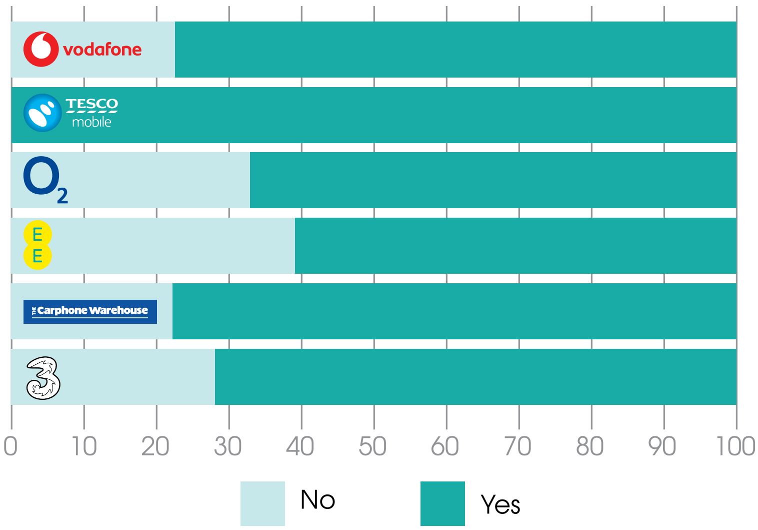
[1] *Deloitte, Mobile Consumer 2015: The UK cut – Game of phones, 2015*

[2] *IBISWorld, Mobile Telephone Retailers market research report, July 2015*

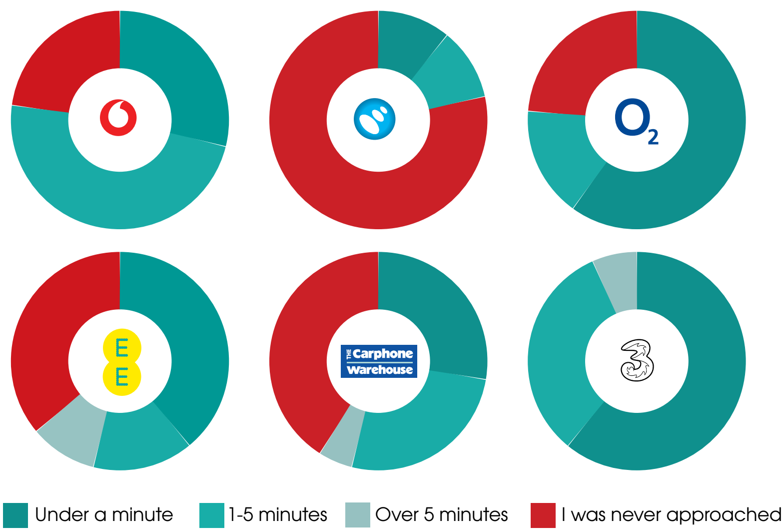
[3] *Which? 2015 annual High Street shopper survey, May 2015*



Was it possible to make informed decision without talking to in-store staff?



How long did you have to wait before being approached?



Source: POPAI Mobile Phone Retailer Shopper Survey, 2015, POPAI UK & Ireland/Roamler

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Martin Kingdon, Director General, POPAI

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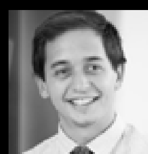
Rob Sellers, MD, GreyShopper



Jamie Holtum, Senior Brand Manager, HJ Heinz Company

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"I was positively impressed with the excellence of the show. There was a well-balanced mix of insights and practical solutions for retail brands, which was very well appreciated, plus a great portfolio of exhibitors, all with qualitative proposals resulting in a good inspiration for future ideas on how to understand and engage with consumers on a different level."

Edoardo Brutti, Retail & Trade Marketing Manager, Wrangler EMEA

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SHELF TO SOFA:

how brands are bringing their products to life post-purchase

The post-purchase customer experience should not be an afterthought, or a token gesture after the money has gone into the till. Research by IBM Institute of Business Value has shown that the post-purchase experience can make or break a shopper's relationship with a retailer, and that it has enormous potential to shape perception of a brand long after the transaction has taken place.

Innovative brands are investing in ways to engage with customers in the last stage of the customer journey. Whether it be targeting the shopper whilst they are still in-store with their purchase, or out in the real world consuming the product, creative thinking is driving shoppers back to the shelf.

LICK – PARIS

Reflecting customers' increasingly connected lives, Lick is a new chain of bricks-and-mortar stores that sells what it calls 'high fashion for high tech'. The Internet of Things is brought to life in colourful retail environments where customers can test all of the products on display and receive expert advice from knowledgeable sales associates, known as coaches.

'Our mission is to coach the customer,' Lick's founder Stéphane Bohbot told GDR Creative Intelligence. *'All our staff are trained as in-store coaches to help customers realise the potential of the products they can try. Connected devices can be instantly demonstrated through apps pre-installed on each of our coaches' smartphones.'*

Personalised QR codes printed on the shoulder of staff uniforms also enable a shopper to connect with the same coach via the Lick app after they have left the store. Having scanned the code when in the store, registered customers will be able to message the coach for further assistance whenever they need it.

Individual coaches will respond in real-time, or when they are next working. The flexibility of the approach not only helps the brand to continue having personal conversations with its customers, and actively encourages showrooming from customers (reflecting the way modern consumers shop anyway), it also gives more responsibility to and places more value on staff, which helps ensure a lower churn-rate.

PIZZA HUT

– HONG KONG

Pizza Hut in Hong Kong has created the Blockbuster Box, which can turn from pizza delivery packaging into a small film projector in a few easy steps.

The pizza box comes with a ready-to-remove hole in its side, and the central stand, which keeps the pizza from being crushed, includes a lens and doubles as a smartphone stand.

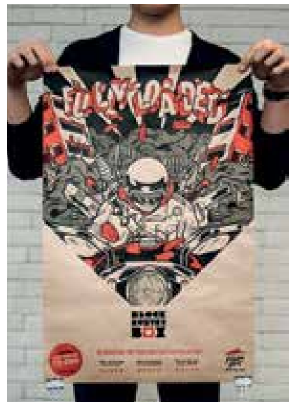
Once the lens has been placed in the box's hole, customers can scan the side of their box with their smartphone in order to unlock exclusive films. Then, by placing their phone in the stand, they can watch the content while eating their freshly delivered pizza.

Besides watching films from Pizza Hut's featured website, the film projector also works with Netflix and YouTube videos.

Online customers can choose from one of four distinct boxes that best reflect the style of the movie they intend to watch.

The four boxes to choose from include the horror themed Slice Night, sci-fi spectacle Anchovy Armageddon, bizarrely romantic Hot and Ready, and the thrilling Fully Loaded.

The box is available to customers in Hong Kong only.



PURINA PUPPYHOOD

– USA

Purina has launched Puppyhood, a magazine-style website that aims to be a one-stop shop for information about how to best care for a puppy.

Puppyhood has multiple sections for users to browse, including nutrition, grooming, health and training. Users can also discover the most popular content trending on the website.

US-centric at present, Puppyhood also brings the online community into the physical world, with a tool to let users explore relevant services in their local area, such as vets and dog-friendly parks.

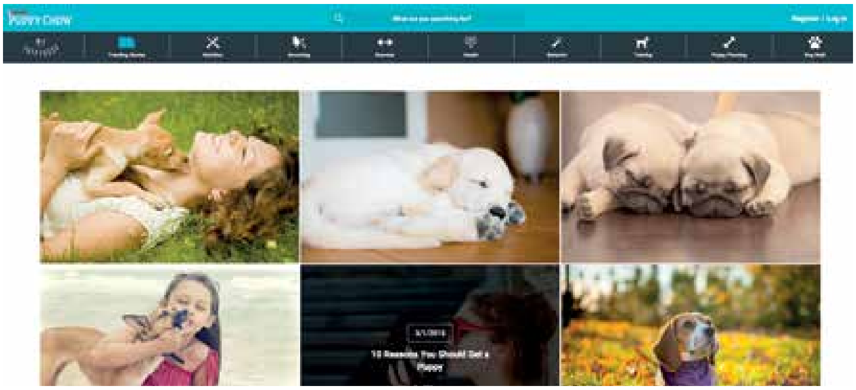
Once registered – which involves inputting the breed, size and age of the user's dog – Puppyhood adapts its content to the pet so that the information shown continues to be relevant.

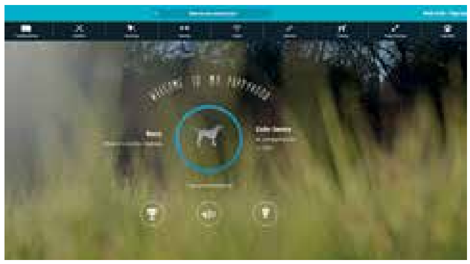
Although created for the Purina Puppy Chow brand, there is very little Purina branding on the site and nutritional advice is kept neutral without any product mentions.

The biggest exposure to the Purina brand is upon registering, with new users receiving a free bag of Puppy Chow. This allows for the information to be read at face value without feeling steered towards a particular brand or product.

Deeper engagement with the brand is the users' prerogative.

'Brands need to be about more than a product,' said Marcus Fong, brand manager of digital communications at Purina. 'What we bring to the table is a value-add: expertise and utility. Obviously we want to sell product, but let's not make it overpowering. It's not a big sales pitch.'





GDR CREATIVE INTELLIGENCE

GDR Creative Intelligence is a London-based foresight agency, which provides the world's leading retailers and brands with all the intelligence and analysis they need to make smarter choices – online, in-store and in person.

These case studies were featured in its quarterly trends publication, the Global Innovation Report, and on its digital platform.

An in-depth report will be emailed to POPAI members soon.

To find out more, contact colin@gdruk.com. Follow GDR Creative Intelligence @gdruk on Twitter and sign up to the weekly newsletter, Strategic inspiration for Retail: eepurl.com/lgV95

SHELF PROMOTION

Industry Update

Far from kicking back and going into hibernation as the year draws to a close, POPAI has been busy working on a host of events and initiatives for 2016. Here we look ahead to what the year ahead has in store, as well as looking back at what has been a busy and eventful 2015.

Conference
Best in class
POPAI Retail Marketing Conference 2016

2016 is nearly here, and to kick-start the year POPAI is planning its biggest annual Retail Marketing Conference yet. Hosted in the heart of London, the event will feature the latest insights of P-O-P professionals and industry leaders from brands including Boots, HSBC, Twitter, Unilever, Lucozade Ribena Suntory, and more. The conference, which is to be held on Thursday 4 February 2016, is a great opportunity to meet and mingle with industry colleagues, learn about current developments in-store and explore the latest in retail marketing thinking. Tickets are on sale now and always sell out fast, so don't miss out. If you have any questions about the event please contact the office on 01455 613651 or info@popai.co.uk. Find out more about this exciting event on the POPAI Events page.
www.popai.co.uk/events

Library
Browsing in-store
Online

It's been a good year here at POPAI. We've hosted multiple events, welcomed hundreds of delegates, and heard from over 35 speakers – all of whom offered fresh insight into the retail industry and helped spark new ideas and conversations for everyone who attended. Of course, we realise not everyone can come to each event, which is why we've made sure you can download presentations – so you never miss a thing. With subjects ranging from digital store-building to cross-channel marketing and the future of the supermarket, there's a wealth of valuable insight to discover. Simply visit our online library to explore the presentations from top retail brands like Britvic, Camelot, Samsung, Merlin Entertainments, Wickes and more.
www.popai.co.uk/library

Membership
Friends in the right places
Joining Members

This year we've seen our membership numbers continue to grow here at POPAI, and we're proud to have welcomed over 35 additional members. New additions include leading brands and retailers like Lego, Asda, B&Q, Pfizer and HSBC, alongside Camelot, United Biscuits, British American Tobacco and many more, so if you're already a POPAI member – you're in good company. Check out the full list of current members today.
www.popai.co.uk/members

Events
Promotional calendar
Diary Dates

Here's a hand with your artistic intake over the coming year, from industry awards and must-attend seminars. As well as our Annual Conference, February will see the launch of the 2016 POPAI Awards. The Awards continue to reward the best the retail marketing industry has to offer in all areas of in-store communication, so start planning your entries now. We're putting the finishing touches to our calendar of events for 2016 and can reveal that in May we'll host a seminar focused on achieving the 'luxe look' in-store. We will look at the reasons for the growth in this trend, changing shopper buying habits, and what it means for brands and marketers. If you're interested in taking part do get in touch. Check out the POPAI website for all our latest news and activities.
www.popai.co.uk

Education
Self service
e-Course Learning

Why not make 2016 the year of learning and encourage your team to take advantage of the all-new POPAI eCourses? With a range of modules for both clients and supplier-side members, these courses let you learn at your own pace, wherever you are – true flexible learning. There are currently ten modules available and what's more the first two modules are absolutely free for members, with all additional learning modules costing just £49 each. Visit the POPAI website to discover more.
www.popai.co.uk/education

CHECK OUT

OBSERVATION

Issue 24

There are lies, damn lies and statistics. There are also a number of tech innovations that have delivered a few falsehoods over the years. As 2015 draws to a close we've already made it our resolution to help you get closer to the truth and dispel the myths on the never-ending quest for in-store betterment.

Did you know that 86% of shoppers who visit retail websites actually type searches into the browsers using their left hand? Or that, by contrast, 42% of shoppers who use mobile phones whilst shopping in-store hold the phone with their left hand, whilst their right foot is the first to cross the threshold into the retail environment? Or how about this one: apparently, 5% of shoppers say they would use discount coupons more if mobile devices had built-in printers to give them physical vouchers when in-store.

Those who are not reading this in the twilight hours after another late night at their desk will have rumbled me on that last one. In fact – just for clarity – not one of them is true. Yet when provided with a big enough stage, and said with the right level of authority, there is every chance that they could find their way into a presentation here, or a blog post there. And before you know it, they could become industry truths. Frankly, the ease with which some accept and adopt statistics as 'fact' is worrying.

Even those that are true often go on to be misquoted, taken out of context and reapplied to categories, and in circumstances, for which they were never intended – it takes surprisingly little effort to find many such examples. All too often statistics can also unwittingly mask real issues rather than help to shine a light on them. Sometimes insight projects are spun to what agencies want marketers to hear. The result is a focus on validating what's already been decided, rather than being objective and identifying what's right – for the brand and the shopper – even if it makes for difficult reading.

Our Compliance Report (see page 11) offers up another such example. Claims within the industry of 98% compliance, and higher, are commonplace. Whilst there is no doubting the validity of such claims on some projects, when such figures are heard so frequently it belies the very real issues that brands still face when it comes to campaign compliance in stores. Successfully landing a campaign on day one of launch is one thing. But what happens next? Currently, compliance figures rarely tell us that. Yet ensuring displays are compliant throughout their life in-store remains a common gripe amongst retail marketers. 53.7% of them, shall we call it?

If you were at the Spring Seminar at the start of 2015, your mind may now be wandering back to a presentation that began with POPAI director, Phil Day, revealing a series of other made-up statistics – created to prove the point that lots is said, and a lot is easily believed, when it comes to the brave new world of the connected shopper. The purpose of that event was to dispel the myths and uncover the truth, to give retail marketers a better understanding of what shoppers really want and what they actually do. The important thing is to remain focused on what's really happening in-store. Today. Right now. And if you do feel the need to go all 'future gazing' on people, try limiting your focus on the next six months, where you can make a visible difference in the here and now.

All of which brings us to the crux of the issue or, to be more precise – Issue 24. The new-look, meatier, more fact-laden *In-Store Insights* seeks to provide content that's more authoritative, substantiated and practical, as demonstrated with our new report format – complete with meaningful statistics and key take-outs – designed to help inform and influence real decisions in the real world, every day.

I look forward to hearing your feedback on our new-look publication. And if practical insight sounds like your thing, why not join us for even more informed debate at the 2016 POPAI Retail Marketing Conference, taking place in the capital next February. In the meantime, all that's left to do is to thank those who have helped support *In-Store Insights* throughout 2015 and to wish everyone Merry Christmas and a very prosperous New Year. You can email me at editor@popai.co.uk.