NON-MEMBER EDITION

| ISSUE 40 | 2020

POPAI
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RESEARCH REPORTS

IN-STORE INSIGHTS

FULL REPORTS FREE TO POPAI MEMBERS

SHOPPER INVESTIGATION

Toys

As toy retailers geared up for the 2019 festive season, we asked: which made it child's play, and which need to up their game?

CAMPAIGN REPORT

Sustainability In-Store

As environmental concerns grow, how well do brands and retailers get their CSR message across? We explore their efforts in our report.

STOREDITS

Irish Convenience

How does display influence convenience shoppers in Ireland? Our report delves into their behaviour.

GLOBAL TRENDS

Focus on the Formula

Secrecy and mystique have been replaced by storytelling and transparency, as brands seek to seal their sustainability credentials.

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Our members edition of *In-Store Insights* is a bumper one, as we celebrate 10 glorious years of the publication. It was born after the demise of the *In-Store Marketing* magazine – which a few of you may just remember – as we felt it was our duty to give the industry a voice in printed format.

In the early days, it was a classic magazine, with interviews, opinion, features…and no news. But we realised we could use POPAI's assets to generate 'harder' reports with serious substance. From here, we began to feature Awards case studies as examples of best practice, and used conference presentations as features. And over time, it has morphed into a vehicle for delivering 16 research reports each year to our members.

I'd like to say a massive thank you to the person who helped us formulate the concept, and was editor for the first seven years – Marc Baker. Under his guidance, perseverance and hard work, the idea became a reality, and I'm very grateful to him for this.

We wanted to give our members' issue a real celebratory feel, so we have a nostalgic look back over the 10 years. Our first issue in 2010 was pretty prophetic, as we discussed the role of technology and predicted the growing part the mobile phone would play in the physical retail environment. In the summer of the same year, the football World Cup was held in South Africa, so we took a deep dive into the category of sports retail. Moving on to 2011, it seems that 'multichannel' was the new watchword, as we asked shoppers how they hopped across the channels for their purchasing. It's a fascinating look back.

Our usual reports are all inside too. On **page 5**, we explore the manic and magical world of toy retailing at Christmas, while our report on **page 9** investigates the changing face of Sustainability In-Store in the light of new environmental concerns. **Page 14**'s Storedits puts Irish convenience stores under the spotlight, and our Global Trends report on **page 18** explains the power of storytelling to enhance brand credentials.

It's a packed issue, one which has made me look at our industry through rather nostalgic eyes. Wishing you all a Happy New Year, and I'll look forward to all that 2020 has to offer us in the retail industry.

Phil Day
POPAI

POPAI IN-STORE INSIGHTS
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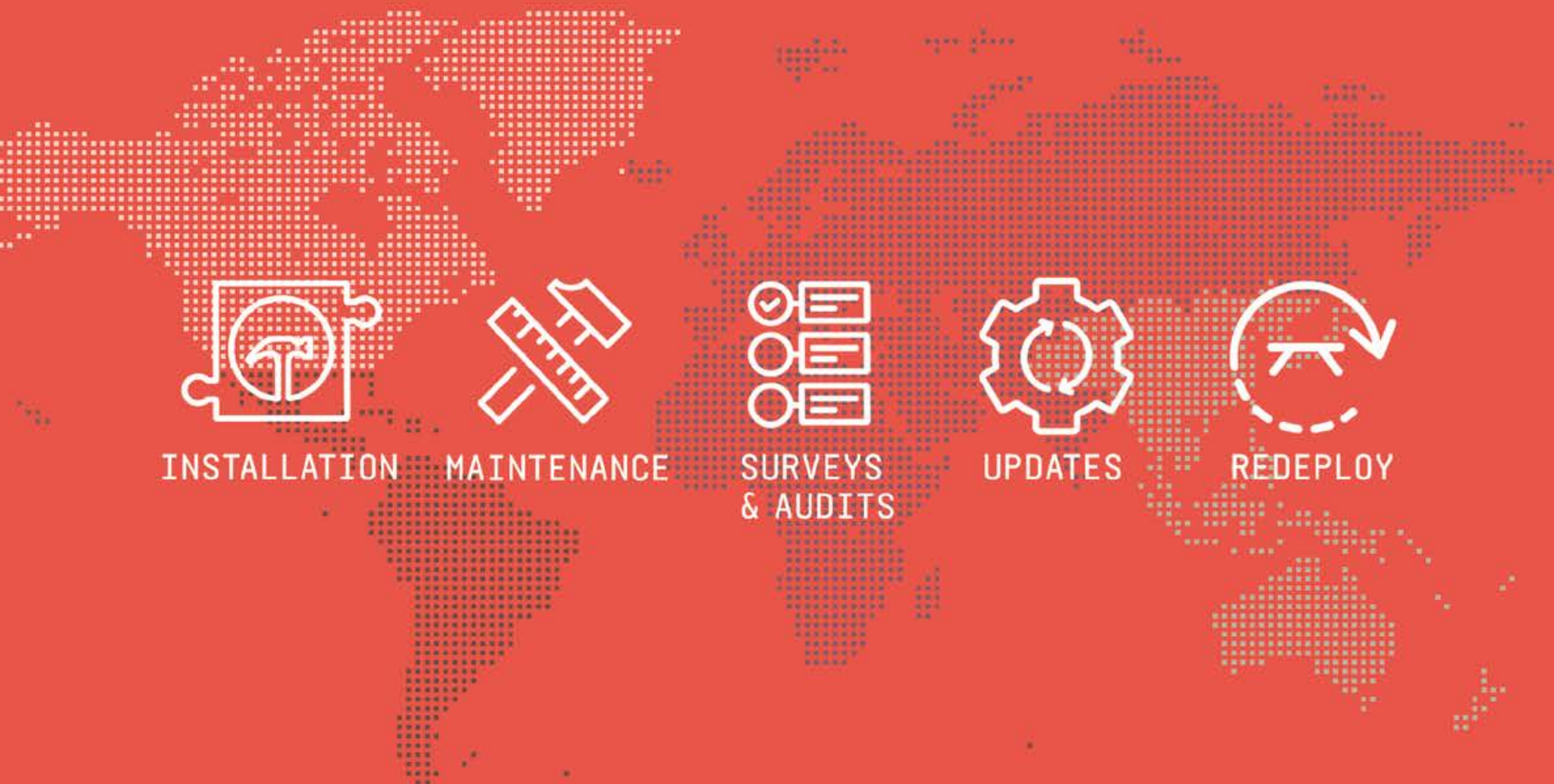

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SHOPPER INVESTIGATION

TOYS

Toy retailing is notoriously tricky. Our research set out to discover how the industry geared up for the Christmas rush.

The UK toy market

It has been a tough few years for the UK toy industry. Sales declined in 2018, and the demise of major player Toys R Us was a huge blow. Add to that a poor performance of licensed products and an increase in counterfeit items, and it all seems like a sorry toy story.[1]

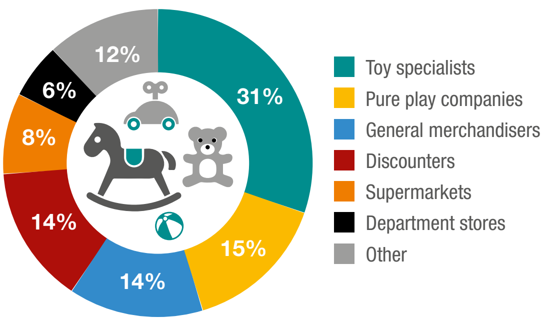
Thankfully, it is not all bad news. The high street is standing strong, with in-store sales accounting for 55% of the market.[2]

At Christmas, each child up to the age of 11 receives an average of eight toys worth £86 – this is clearly an important time for these retailers.[3]

Our shoppers

In November 2019 we asked 100 shoppers to visit a range of specialist toy retailers, supermarkets and value stores and record what sort of promotional messaging and display equipment they saw, where they saw it and how impactful it was. We also asked them about their decision-making processes and shopping habits when buying toys.

Estimated distribution of spending on toys in 2018



Source: Mintel – Toy Retailing – UK –March 2019

Shopper habits

Over half of our shoppers bought for children aged 4-5, with 8-9 the next most popular age group. Our shoppers preferred to use specialist toy retailers, generally because of range, quality and staff knowledge.

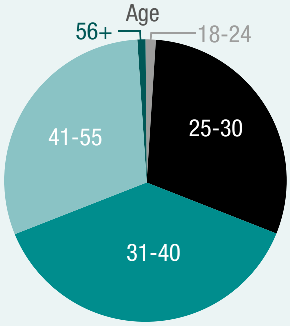
Toy purchase frequency varied considerably, but the average was four to five times a year.

Merchandising and display can influence shoppers, with most of our respondents citing shelf-edge signage as the most powerful. However, a quarter of steadfast shoppers said that once in-store, nothing influences their purchase decision.

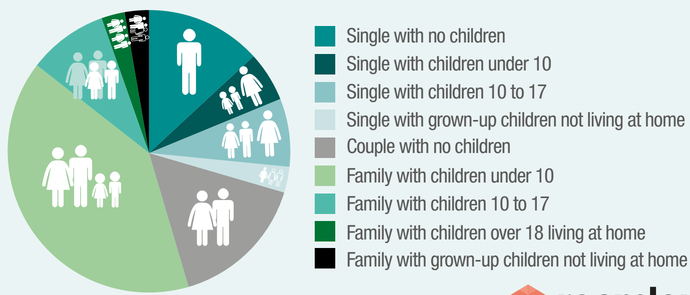
Finally, we asked why some of the shoppers prefer to shop in a physical store rather than online. Overwhelmingly, the answer was to physically see and handle the product, as well as check its quality.

Gender

Age



Family Status



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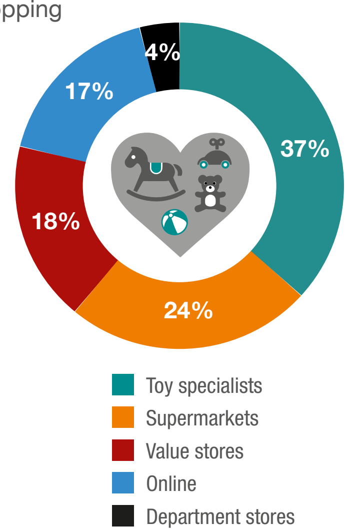
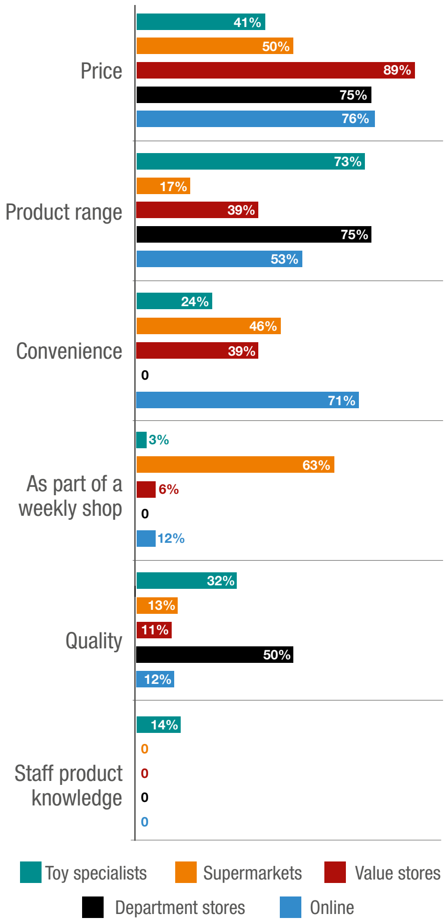
SHOPPER INVESTIGATION
TOYS

Preferred retail channels used for toy shopping



Source: POPAI/Roamler

Reasons for shopping in different retail channels



Source: POPAI/Roamler

NON-SPECIALIST TOY STORES

Our shoppers still found it easy to locate the toy category in these stores, even though almost half had no specific navigational signage.

Compared with specialist stores, our shoppers found very little in the way of external or window displays advertising or displaying toys, and there was also a real lack of display or signage in the main toy categories. Toy displays at checkout were scarce, and digital display was completely absent.

Price reductions were the prevalent promotional mechanic. Multibuys were also spotted, with 'new' messages seen in 13% of stores, proving more popular here than in the specialist stores.

SPECIALIST TOY STORES

The majority of the specialist retailers displayed toys in the window on shelving or floor stacks, and all featured some form of display in the entrance – these were predominantly floor-based.

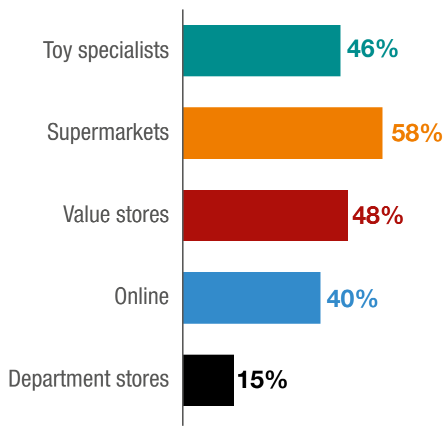
Moving into the main part of the store, advertising or display was seen in most. There were also plenty of display materials at the counter or checkout areas.

Reassuringly, our shoppers found most of the specialist stores easy to navigate, citing the comprehensive signage seen in 90% of stores as the reason for this.

Price reductions on single items was the main type of promotional messaging, seen in just over half of stores.

Personal service was in short supply, with just 10% of our shoppers approached by staff offering assistance. However, more than half the stores did have some form of catalogue with product and promotion information and the majority offered a click-and-collect-style scheme.

Secondary retail channels used for toy shopping



Source: POPAI/Roamler

Our research gave mixed results for these retailers, with easy navigation but variable messaging. In the run up to Christmas, it is a category which could use some extra TLC.

Sources

[1] *Toy World – October 2019*

[2] *BBC News – November 2019*

[3] *UK Toy Industry Statistics and Trends – BrandonGaille – November 2018*

Access our complete findings about toy retailers at Christmas.

Read the **FULL REPORT**

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CAMPAIGN REPORT

SUSTAINABILITY IN-STORE

Sustainability and environmental credentials are firmly under the spotlight. Our report looks at how well retailers are getting the CSR message across.

Corporate Social Responsibility: the bigger picture

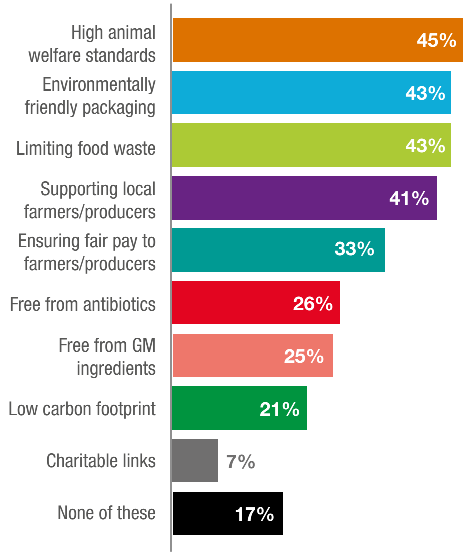
The majority of UK shoppers now describe themselves as ‘environmentally friendly’.[1] To meet new demands, retailers must not only focus on their CSR strategies, but effectively communicate this activity to discerning shoppers.

For example, food waste has moved from being a straightforward cost issue to a reputational one. Nearly three-quarters of shoppers think large supermarket groups should be legally required to produce annual reports on their food and packaging waste.[2]

Our research

POPAI surveyed a cross section of retail channels, supermarkets in particular, in the UK and Republic of Ireland, seeking evidence of CSR activity in campaigns and promotional display materials.

Important factors in food and drink buying decisions



Source: Mintel – February 2019

Binning bags

The once ubiquitous plastic carrier bag is now almost extinct – the number issued by the seven biggest supermarket chains has declined by 86%.[3] Most now offer reusable bags for life, or paper or compostable bags. However, communications tend to be either on the bags themselves or small signs at the checkout, which can lead to shopper confusion.

Among UK adults, 83% say retailers should do more to help reduce packaging waste.[4] Many supermarkets are driving their own initiatives to reduce plastic packaging, but again, very little is seen in the way of in-store communications about these plans.

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CAMPAIGN REPORT

SUSTAINABILITY IN-STORE

Waste not...

Increasingly, CSR activity is communicated in-store on products. Here, collaboration can trump competition, with brands partnering with retailers to promote their environmentally packaged products along with the retailer's own mechanic or loyalty scheme.

While retailers' waste is largely regulated by legislation, some also operate voluntary initiatives, such as plastic bag recycling facilities for their shoppers.

Essential ethics

Animal welfare, environmental and health issues have led 83% of UK adults to buy ethically sourced food and drink.[3]

Retailers are keen to highlight examples of sustainable sourcing, animal welfare and a fair deal for farmers, and sustainable fishing methods are common in supermarkets.[5]

Local issues

The importance of 'locally produced' is not lost on retailers; 60% of all food consumed in the UK is produced on British farms,[5] a fact they are very keen to reinforce.

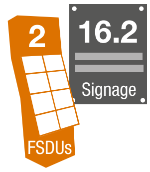
Lidl plans to invest a record £15bn in UK suppliers over the next five years and has committed to source 100% of its fresh poultry from UK farms.[6]

Morrisons has announced it will become the first UK supermarket to commit to selling only British meat, while Asda works with hundreds of local suppliers.

Community services

Community and charitable initiatives are run by a wide range of retailers.

All four of the big supermarkets run some form of charity token scheme. Waitrose was the first and has raised £14m since its programme began in 2008.[7]



Average number of CSR communications by display type seen per store

Source: POPAI

Fighting poverty

Most supermarkets now have containers for food bank collections, with donations being core to their corporate responsibility.

Tesco, Sainsbury's and Waitrose work closely with The Trussell Trust, while Asda has supplemented its in-store support with a pot of £9m, from which food banks can apply for a grant.[8]

Disposing of disposables

The coffee-on-the-go trend has long presented a problem. To counter this, many outlets now offer a discount to customers bringing their own cups.

It is clear that most brands and retailers have commendable CSR strategies, but many could communicate these better.

Sources

[1] *Shoppercentric*
[2] *Retail Bulletin – October 2019*
[3] *ITV News August 2018*
[4] *Mintel – The Ethical Food Consumer – UK – April 2019*
[5] *The Open University – 2019*
[6] *The Retail Bulletin – October 2019*
[7] *UK Fundraising – June 2017*
[8] *The Grocer – August 2019*

Access our complete findings about how brands and retailers communicate their CSR activity.

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In-Store Insights Research Articles

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Shopper Investigation

Objectives:

To learn about shoppers' behaviour with regard to shopping for different product categories and in different retail channels.

To get an objective understanding of in-store merchandising and P-O-P use.

Methodology:

100 members of the public answer a series of questions regarding their shopping habits for a particular product category before visiting specified retail outlets and recording what they recall regarding signage display implementation.

Desk research to provide background and context for the shopper investigation activity.

Display Investigation

Objectives:

To better understand how different P-O-P display types and mechanics are used in different categories and retail sectors, and how they are used to address particular merchandising issues.

To identify the strengths and benefits of each type of display for each sector in which they are deployed.

Methodology:

Integration and analysis of POPAI UK & Ireland document and image libraries (Boxfile and POPwatch).

Retail visits to establish the current use of display types.

Collation of the views and observations of POPAI members.

Display Best Practice

Objectives:

To highlight the common themes and traits that contribute to POPAI award-winning display designs, to guide and inform the industry's future P-O-P programmes.

Methodology:

In-depth review of POPAI award-winning entries by category over the previous five years.

Analysis to identify common and recurring aspects of display design that have been highlighted by the POPAI Awards judges.

Storedits

Objectives:

To achieve an in-depth understanding of in-store activities including seasonal events, merchandising techniques and display use.

Methodology:

Store visits conducted by POPAI staff using SurveyMonkey questionnaires. Typically, 50 stores are visited for each task.

Desk research to provide background and context for the in-store research investigations.

Sector Report

Objectives:

To gain a holistic view of shoppers' journeys and behaviour in a particular retail channel, and as a result, the role P-O-P display has to play in that channel.

Methodology:

Desk research to understand the retail landscape of the channel in question and to identify shopper demographics.

Store visits to analyse the retail environment and its effect on the shopper journey.

Campaign Report

Objectives:

To review and analyse wider in-store shopper marketing activities and brand communications which transcend individual product categories or retail sectors.

Methodology:

Desk research including trade press and POPAI archives, supported by store visits to corroborate research and observe current in-store implementations.

Shopper Segmentation

Objectives:

To investigate why and how specific product categories are shopped.

To compare and contrast different shopping missions for the same product category.

To understand the role P-O-P has to play within the category and to make recommendations on display best practice.

Methodology:

Desk research, including searching POPAI research articles and presentations, and review of third-party research documents and the trade press.

Application of POPAI knowledge and expertise to provide guidance in the use of display by product category and shopper mission.

Frequency

Each quarterly *In-Store Insights* publication contains a Shopper Investigation report. The other six research genres are distributed across the calendar year, often in conjunction with seasonal retail events, ensuring that each *In-Store Insights* provides a mix of research topics and styles.

STOREDITS

IRISH CONVENIENCE

Our research explored shopper behaviour and habits across the Irish convenience sector, looking at the role of display in driving decisions and prompting impulse buys.

Storedits *[stor-ditz]* is an analytical qualitative survey (or store audit) of a retail space carried out by POPAI.

The Irish convenience channel

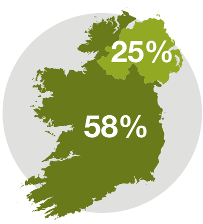
The convenience store is at the heart of local communities across Ireland, used by over 90% of Irish adults who between them make seven million convenience store trips every week.[1]

In the Republic of Ireland the industry was worth an estimated €3.8bn in 2018 and footfall and spend are both increasing.[2]

Shopper habits

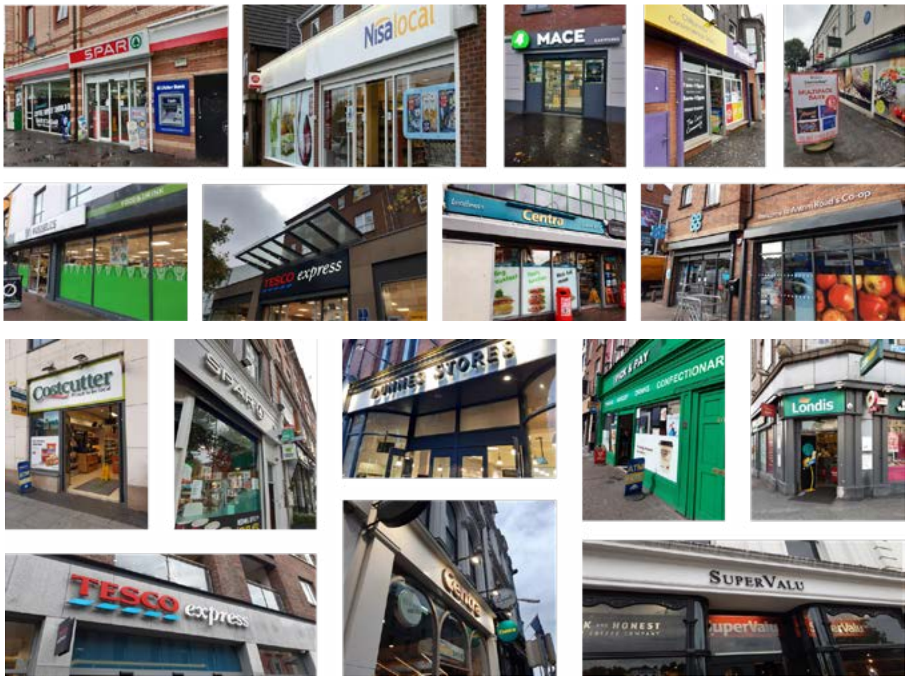
Interestingly, more than half of shoppers surveyed in the Republic of Ireland sometimes use a convenience store for their weekly shop, compared with just a quarter of those in Northern Ireland.

Promotional displays play an extremely important role here. The majority of shoppers in the Republic of Ireland and half of those in Northern Ireland will regularly change their original purchase decision as a result of seeing products on a promotional display.



Percentage of shoppers who use convenience stores for weekly shops

Source: POPAI/Storedits & Roamler



Most frequently purchased product categories in convenience stores in the Republic of Ireland

Source: B&A Research and Insight – Irish Convenience Shopper Trends – September 2019

Our research

Our research was a collaboration of two of POPAI's standard research techniques: Storedits and Shopper Investigation.

We visited 139 convenience stores in the Republic of Ireland and Northern Ireland. We also compared the results with a project from 2017 looking at the wider convenience sector across major cities in Europe.

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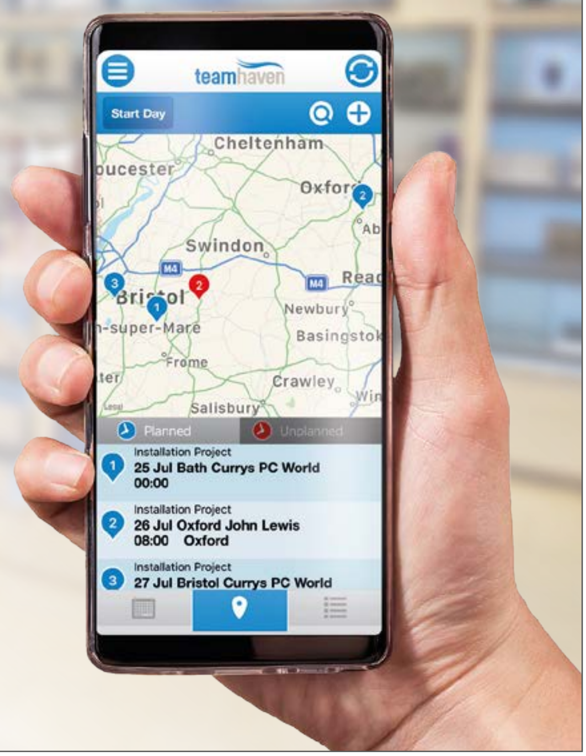
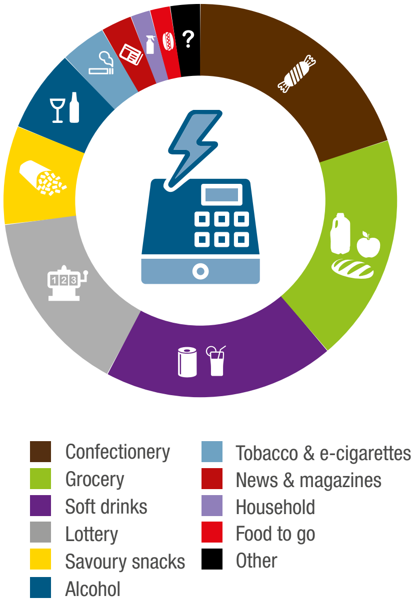


STOREDITS

IRISH CONVENIENCE

Most popular impulse purchase categories



Source: POPAI GDES Study - 2012 to 2018

Percentage of monthly grocery outlay spent in convenience

Source: POPAI/Storedits & Roamler

AT THE STORE

External display was in quite short supply, and most that we saw was permanent. Window display was also scarce. As a result, far fewer promotional messages were seen in Irish stores than in POPAI's pan-European research.

A variety of different display types were seen in the store entrance, the most common of which were for popular categories such as Lotto and newspapers. The main trading area also used a range of P-O-P, with free-standing displays such as FSDUs and dump bins the most prevalent.

Looking beyond Ireland to the rest of Europe, our research revealed that the mix of display use is very similar.

The visually noisy environment in convenience stores can often make it difficult for shoppers to find product categories. It was surprising, therefore, that only half the stores had any navigational signage. Elsewhere in Europe, we found it in 89% of stores.

Digital penetration is relatively low in Ireland, but this is broadly in line with what we found in our European research.

P-O-P display was fairly definitive. With a few exceptions, all images were of product, accompanied by the occasional brand logo. This lack of lifestyle imagery reflects the nature of products displayed in convenience stores.

While shoppers are queuing they might be tempted into an impulse purchase. Therefore, we were surprised that under half the stores visited had a queuing system.

Promotional activity in-store was resoundingly generic. There were lots of 'save', 'great deal' and 'low price' messages, without any specifics of actual price reductions.

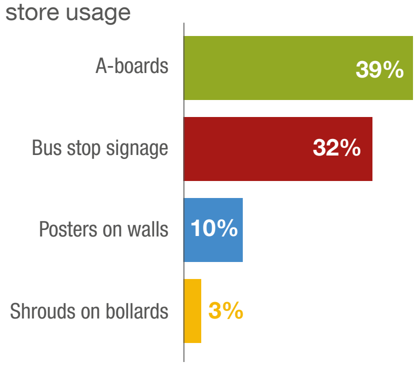
STORE SERVICES

Food service was more prevalent in Irish convenience stores than our pan-European research found on the continent. Food service signage was bold and clear and again, digital technology was at a minimum.

Convenience stores offer a wide range of other services. However, only ATMs were found at all the stores visited.

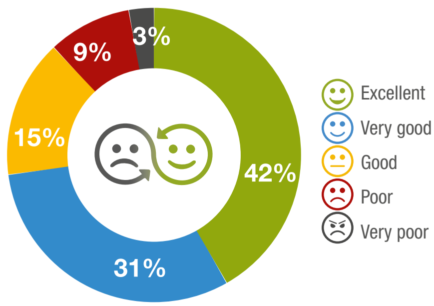
Customer seating areas were available in a third of stores, but loyalty schemes and CSR activity were seen in under 20%. Meanwhile, staff greeted us or offered assistance in just under a quarter of stores.

Popularity of external display types by store usage



Source: POPAI/Storedits & Roamler

Overall shopping experience



Source: POPAI/Storedits & Roamler

Clearly, there are significant differences in convenience store shopping habits between the Republic of Ireland and Northern Ireland. There are also notable differences in P-O-P usage both sides of the border, and when compared with other stores in Europe.

Sources

[1] *B&A Research and Insight – Irish Convenience Shopper Trends – September 2019*

[2] *Passport – Convenience Stores in Ireland – December 2018*

[3] *POPAI – The Role of Display in the Convenience Channel in the UK – March 2019*

Access our full research on the Irish convenience sector.

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GLOBAL TRENDS

FOCUS ON THE FORMULA

Storytelling around ingredients and processes makes a strong statement about key brand assets

Traditionally many successful brands created a mystique around their secret ingredients and formulas. However, as customers yearn for transparency, brands need to be a lot more open about their formulations and their processes.

A report from Label Insight and the Food Marketing Institute (FMI) revealed that 61% of shoppers say they are willing to pay more for products with in-depth product information, and 89% said they would switch to a new product if not satisfied with the information that is there.

Ceding control

Nielsen's *Sustainability Imperative* report found that 73% of global millennials will pay more for a product that is sustainable. It argued that millennials link 'sustainable' to a number of positive things, including 'trustworthiness, health/wellness, natural or organic, and environmentally friendly'.

Responding to this, Typology is a French beauty brand with a commitment to using only natural ingredients. Its TEN range contains products with a maximum of ten ingredients, all of which are natural. Typology also offers the RAW range, single natural ingredients that customers can buy and mix themselves at home following recipes provided on the brand's website.

Korean stationery brand Monami is another brand ceding more control to its customers. It has opened a concept store called Ink Lab where visitors can mix existing inks to produce their own unique, personalised colours.

Similarly, Pernod Ricard brand Chivas Regal has released blending kits to engage drinkers in the craft behind its blended whiskies. Each kit includes five 5cl bottles that customers can use to experiment and create their own blends.

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GLOBAL TRENDS
FOCUS ON THE FORMULA

Removing choice anxiety

Another reason brands are opening up about their formulations is to alleviate choice anxiety and help customers find the right products for them.

Tippling Club in Singapore guides guests through its cocktail menu by using gummy bear samples presented on a laminated cocktail menu alongside the cocktail's names and key flavours, providing a unique way to guide customers through the intricacies of the brand's product range.

Japanese sake brand and bar Yummy Sake meanwhile has created a bespoke taste spectrum featuring 12 different flavour profiles. Customers can take part in a sake tasting session and, based on their feedback, are linked to their ideal taste profile.

Underlining credentials

Other brands with a long-term commitment to natural ingredients are ramping up their storytelling to highlight their point of differentiation.

Premium Austrian honey brand Darbo reinforces that its product is both locally sourced and completely natural by letting its bees create organic labels for its jars.

To emphasise its use of organic, natural ingredients instead of artificial alternatives, lollipop brand Amborella Organics includes seeds in its sticks so that customers can grow the ingredients.

A playful twist

Two well-known brands that recently underlined the flexibility of their tried and tested recipes and process are Heinz and IKEA. For Valentine's Day, Heinz released a limited-edition premium alternative: Ketchup Caviar. IKEA, meanwhile, released flat-pack chocolate Easter bunny kits, mimicking the brand's furniture.

This trend contains a number of different approaches, but what unites them all is the way each brand uses its key assets to engage on a deeper level with its customers.

Access the full findings from this report to find out more.

Read the **FULL REPORT**

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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 available to POPAI members soon.

To find out more, contact **john@gdruk.com** Follow GDR Creative Intelligence **@gdruk** on Twitter and sign up to the weekly newsletter, Strategic Inspiration for Retail: **http://eepurl.com/dg5arH**

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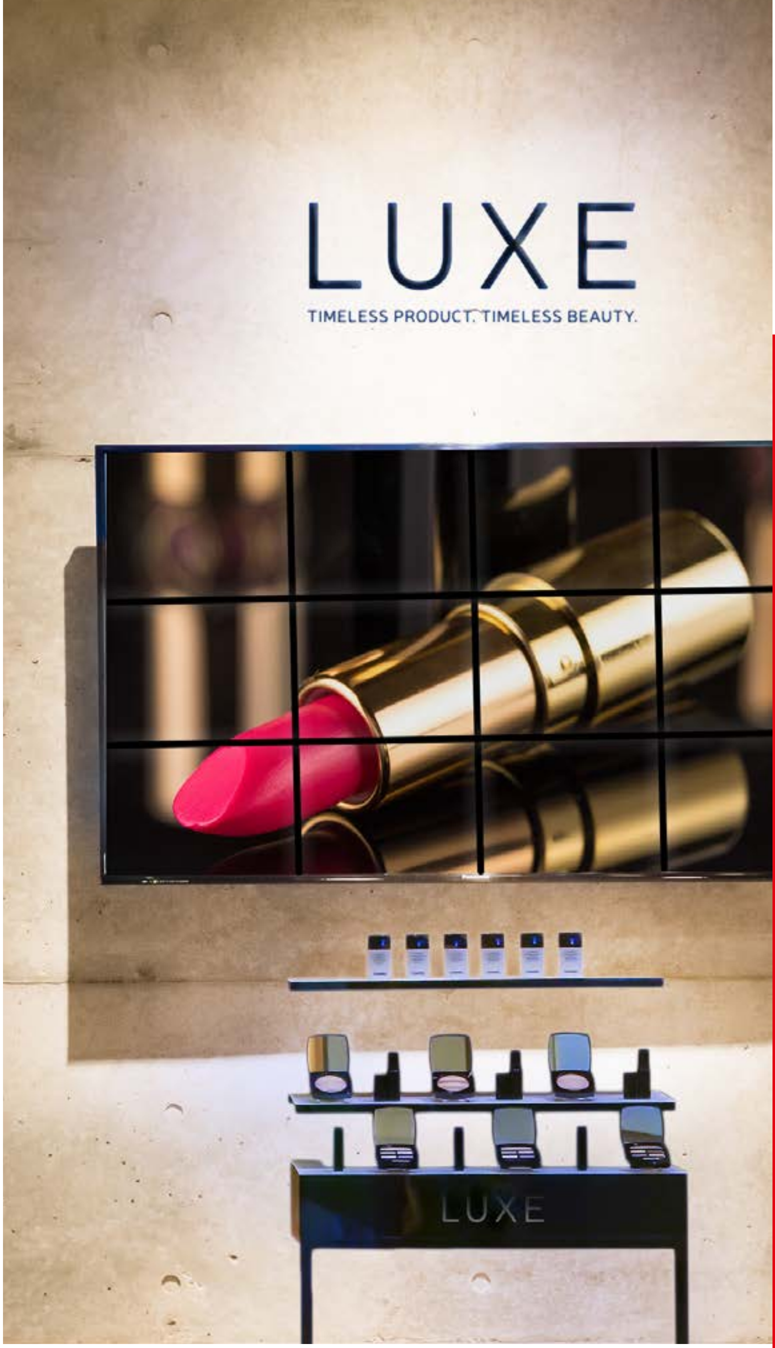

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