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| **ISSUE 42** | 2020

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Welcome to the latest issue of *In-Store Insights*.

The way we shop has changed over the past months due to enforced lockdown. Our articles this month recognise this, at the same time reinforcing that known principles of retailing and the shopping experience are still relevant.

Our Shopper Investigation on [page 5](#) takes a closer look at how we shop for Easter. With research conducted pre-lockdown, we explored what shoppers are buying (lots of chocolate, it seems!), where they buy it and what prompts their purchases. With just 1% of our shoppers choosing to buy these products online, it seems this is a key area for bricks-and-mortar retailing – and our shopper behaviour insights can help retailers drive sales in future years.

Meanwhile, good CSR credentials are continuing to be an important factor for any brand. Sustainability in P-O-P and environmental awareness are high on the list of shopper demands, and these are ever increasing. Our Spotlight on Sustainability report on [page 9](#) looks at what brands are doing, what more they could do and – crucially – how they communicate their CSR activity to customers.

Finally, has COVID-19 accelerated shopping and retail trends which were already in motion? Will the way we shop change forever? Our Global Trends report on [page 14](#) explores the impact of the new challenges facing retailers.

Enjoy the issue!

Phil Day
POPAL

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SHOPPER INVESTIGATION



Easter

Putting shoppers' buying habits under the spotlight, we look at what prompts their Easter purchases to drive a sweet surge in sales.

p5

INDUSTRY REPORT



Spotlight on sustainability

CSR credentials and an environmental responsibility are high on shoppers' expectations of a brand. We investigate the role P-O-P can play, and explore how brands can better communicate their CSR activity.

p9

GLOBAL TRENDS



How Coronavirus will change the way we shop

What has the impact of COVID-19 been on shopper behaviour? Accelerating some trends and creating new challenges – will it change the very nature of the way we shop?

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Visit our website for the latest news, reports and events from POPAL. In addition, you will find a back catalogue of industry research and the POPAL Awards gallery.

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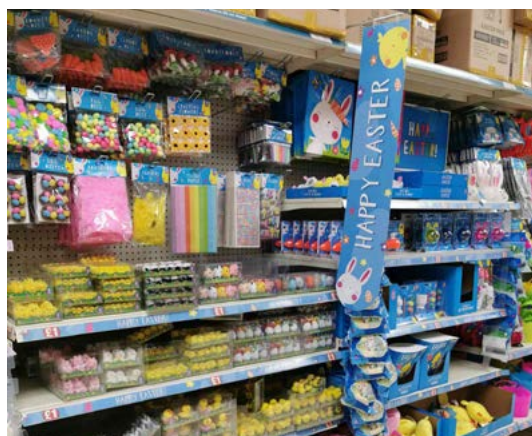
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SHOPPER INVESTIGATION



EASTER

Easter is a key point on the retail calendar. However, the onset of lockdown in 2020 meant that many retailers did not see the usual sweet surge in sales. But understanding shopper behaviour can help to drive these sales in future years. Our Shopper Investigation explored shoppers' attitudes to Easter shopping, and how the occasion was promoted and displayed in store.



A new retail reality

Easter 2020 was a rather subdued affair, with the occasion impacted significantly by the COVID-19 outbreak and subsequent lockdown.

Clearly, these unprecedented events will have had a big impact on Easter sales. Indeed, many retailers were shut, and high street footfall was down by a massive 86.2% over the Easter weekend.¹

Our shoppers

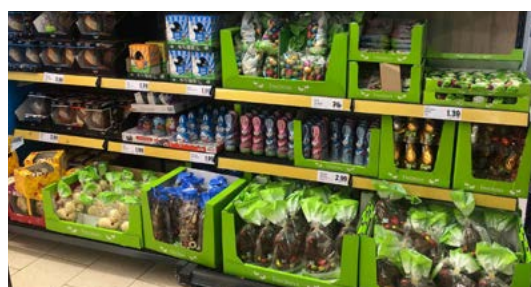
Before the UK lockdown was announced, we asked 87 shoppers to visit a range of supermarkets, convenience stores and value retailers to observe and record the Easter related P-O-P display materials and promotional activity they saw.

Shopper habits

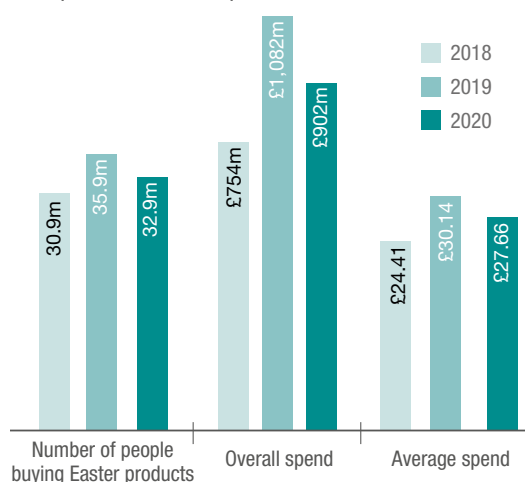
Our shoppers buy from a wide range of traditional products. But Easter eggs of all sizes remain the most popular choices, bought by more than two-thirds of our respondents.

Online shopping may be making huge inroads in a number of areas, but only 1% of shoppers said this was their preferred option at Easter.

As we conducted our research, we were in a potential lockdown situation. But our shoppers' planned Easter spending for 2020 was not significantly different from that which they had spent in 2019.

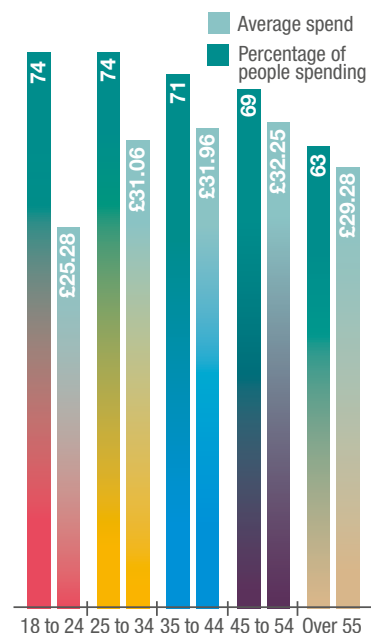


UK spend on Easter products



Source: Finder – Easter Statistics UK – 2nd April 2020

UK Easter spending by age group



Source: Finder – Easter Statistics UK – January 2020

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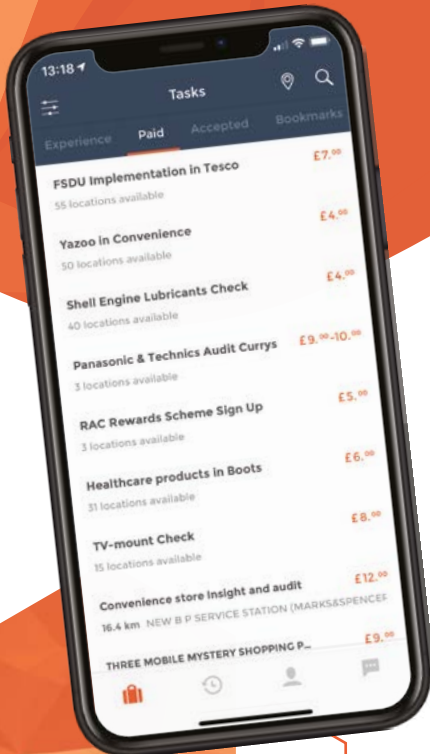
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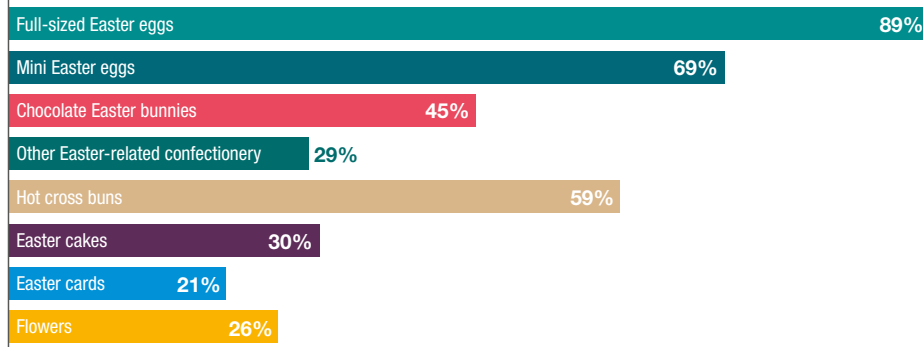


SHOPPER INVESTIGATION

EASTER



Easter products bought by shoppers



Source: POPAI/Roamlar

Easter influences

Easily the most influential mechanic is shelf-edge price promotions, with 84% of shoppers saying that this would sway them.

Brand loyalty is fairly low among our shoppers, with just 17% saying they always buy the same brand.

At the store

Our shoppers saw very little Easter-related signage outside stores or in windows – perhaps due to the close proximity of Mother's Day.

While it was somewhat lacking outside, Easter marketing activity seemed much more prevalent in store entrances.

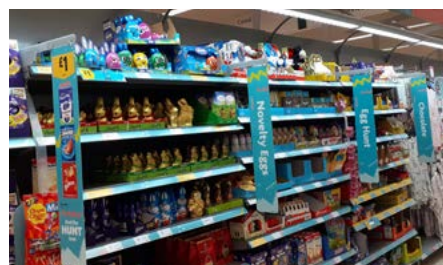
In common with most seasonal events, many stores had a designated area to merchandise Easter products. Beyond these areas, our shoppers saw a variety of other displays promoting Easter items elsewhere.

When it came to branding, Cadbury was king, seen in 86% of all stores visited. Our shoppers also spotted Lindt, Mars and Nestlé.

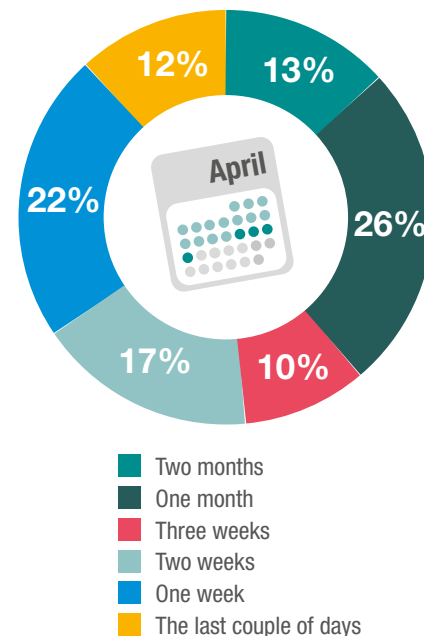
In an era where nutritional information and ingredients are increasingly important, it was perhaps surprising that our shoppers saw only a small amount of Easter signage with dietary or allergen information.

Beyond chocolate

Chocolate still seems to be leading the way in terms of Easter products – our shoppers saw relatively few non-edible Easter products in the stores they visited. Of those they did see, toys and craft items were the most common.



How long before Easter shoppers start to buy Easter products



Source: POPAI/Roamlar

As retailers begin to open their doors and welcome back shoppers, these findings are a good indicator to them of shoppers' behaviour towards Easter. As health awareness and shoppers either choosing or needing 'free from' products increase, product information which is currently lacking could be improved to cater for these shoppers.

Sources

¹ Statista – 17th April 2020

Access our complete, comprehensive findings about shopper behaviour and in-store activity at Easter.



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DOES YOUR P-O-P JOURNEY BEGIN WITH THE END IN MIND?

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We offer a range of solutions to handle retail displays which have served their purpose, from disassembly & removal to refurbishment, repurposing, recycling and target zero waste to landfill.

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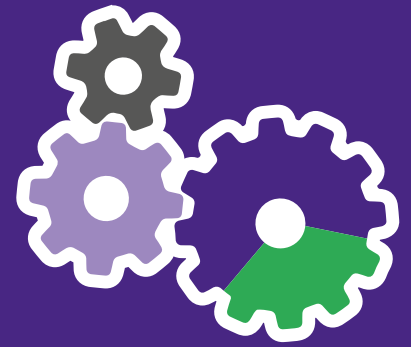
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INDUSTRY REPORT

SPOTLIGHT ON SUSTAINABILITY



As corporate social responsibility (CSR) continues to loom large in the minds of retailers, brands and consumers, our report shines the spotlight on the role P-O-P plays in today's sustainability conscious retail environment.

The need for greener retail practices has never been greater. With 80% of UK shoppers describing themselves as 'environmentally friendly',¹ it is abundantly clear that the display industry needs to rise to the sustainability challenge. Indeed, shoppers are proving happy to turn their backs on non-compliant brands.



The sustainability story

A strong CSR story is about much more than avoiding lost sales. Brands and retailers which have a well-publicised, positive approach to CSR can benefit in a number of other ways, too.

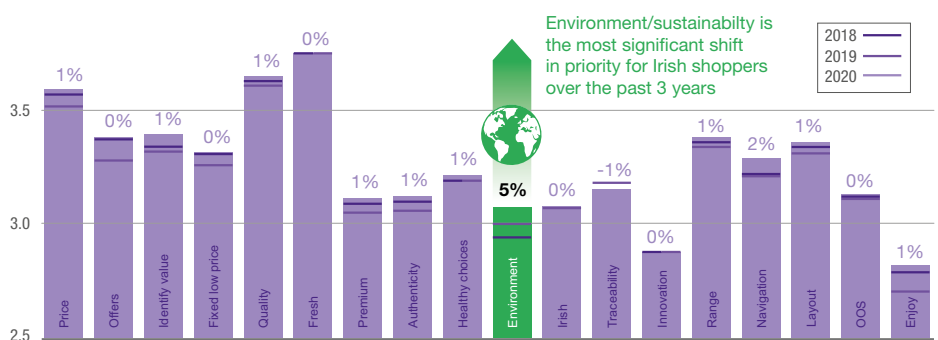
It can help to create an emotional connection with shoppers, boosting engagement and empowerment with those seeking purpose-driven brands. Environmentally sound display and sustainable practices can also create cost savings.

Publicising the policy is equally as important as creating it. If a brand supports programmes with integrity, which are aligned to its values and culture, this is a win-win scenario.

However, there is work to be done here, with 66% of shoppers saying that they felt there should be greater emphasis in this area.²

P-O-P can promote products, provide secondary siting opportunities and communicate product information. But another, hugely important, function is to shout about the CSR credentials of a product, brand or retailer.

Priorities/expectations of Irish shoppers



Source: Shopper Intelligence – The Irish Grocery Shopper 2020 Insights

The easy way to measure P-O-P sustainability

What are the environmental impacts of your P-O-P? With sustainability high on many organisations' agendas, and forming a large part of the demands and expectations of brands and retailers, it's clear that boosting your sustainable credentials is a win-win scenario.

You'll be stepping up to your responsibilities, gaining a competitive advantage and enhancing your reputation in the process.

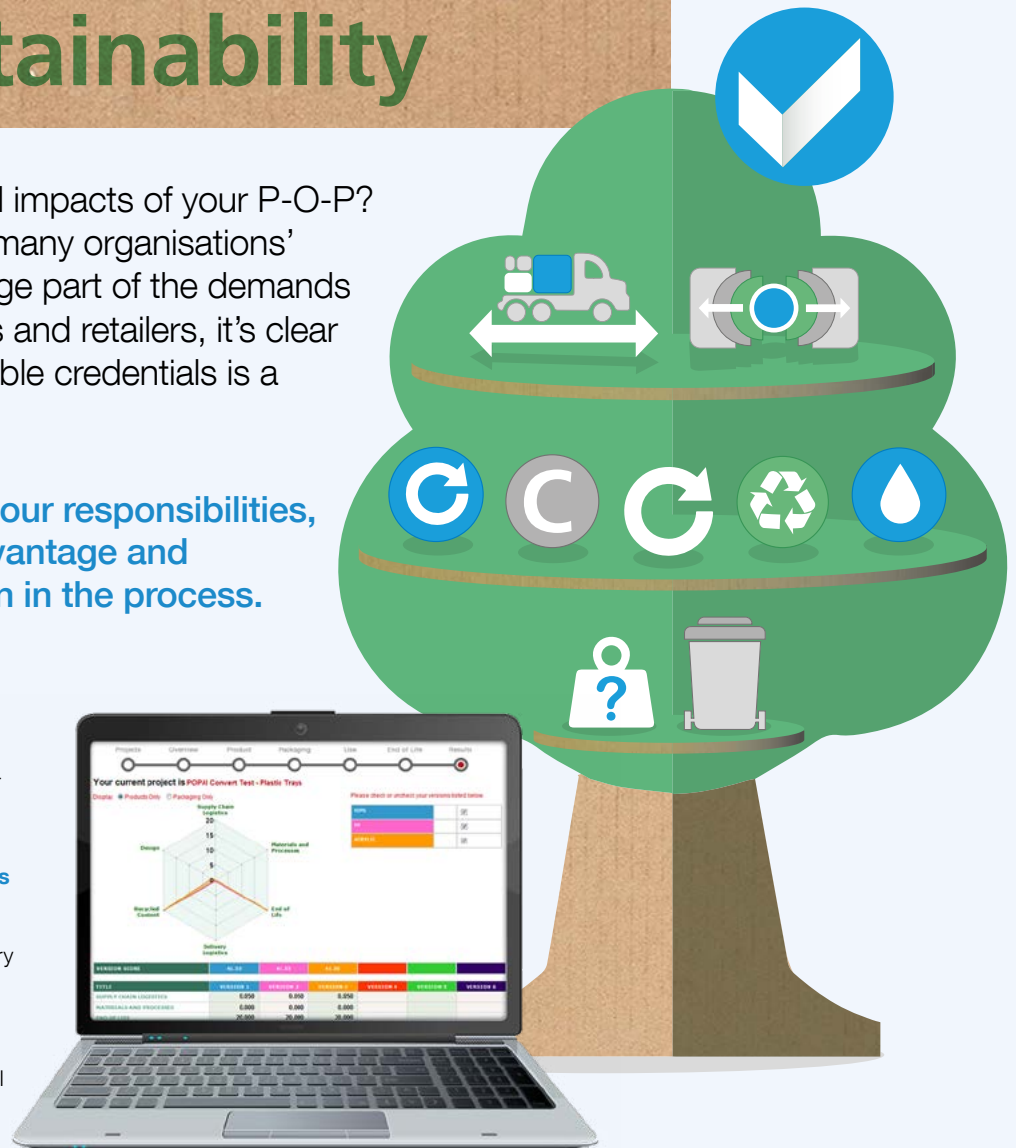
Introducing Sustain™

POPAI's eco-design indicator, Sustain™, lets you measure up to six projects and discover their environmental impacts – so you can adjust your designs for optimum results.

The tool will **give you a score for products and packaging separately**, based on design; materials and process; recycled content; end of life; supply chain; and delivery logistics.

How to use the results

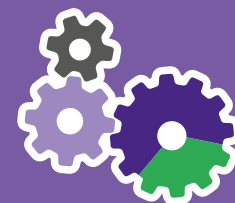
Once you've got your statistics, Sustain™ will offer some recommendations to improve your scores. This includes how to reduce the carbon footprint and increase the recycled content and recyclability.



Screen example for Sustain's visually rendered results

INDUSTRY REPORT

SPOTLIGHT ON SUSTAINABILITY



Multiple meanings

The word 'sustainability' is often used to talk about a range of environmental issues and practices. But research in 2018 showed that the word has multiple meanings for shoppers and can describe a range of shopping behaviours.²

POPAl's six pillars

The POPAl Sustain tool (previously ConVert) identified six pillars for producing sustainable P-O-P display. These are: design; materials and process; recycled content; end of life; supply chain; and delivery logistics. The pillars capture or touch on all of the definitions of sustainability given by shoppers, so act as clear guidance for retailers to follow.

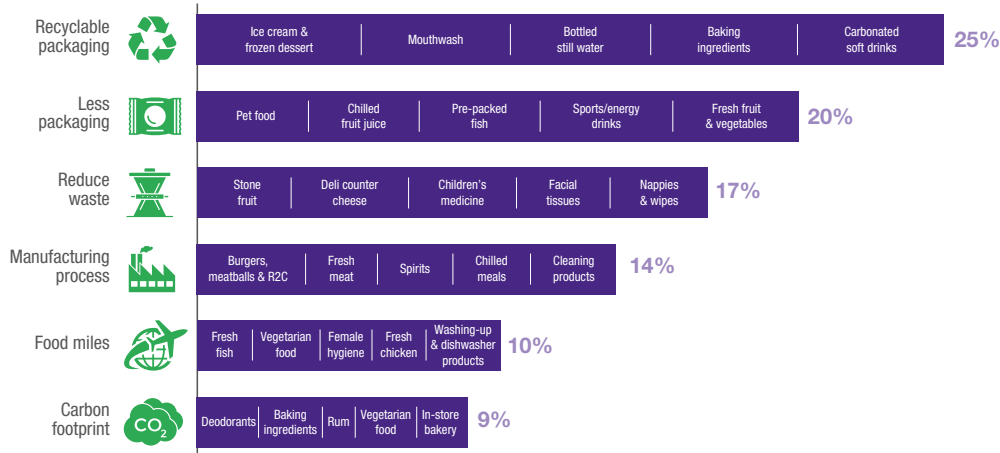
The Sustainability category was introduced to the POPAl Awards in 2013. To see how each of these pillars has been incorporated into sustainable P-O-P design and manufacture, we looked back at the 33 entries submitted over the past seven years to identify common achievable practices and themes.

Measure and improve using POPAl's Sustain tool

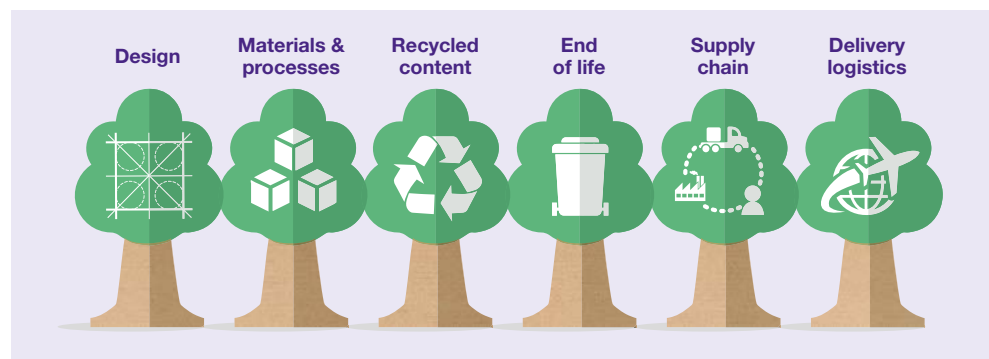
Finally, to understand how each of these key sustainability indicators are performing for any given display – and how they compare with previous units or targets set either internally or by clients – they need to be measured. Essentially, if you cannot measure it, you cannot manage it.



Environment means different things for different categories



Percentage of Irish shoppers who identify most with each environmental aspect
Source: Shopper Intelligence – The Irish Grocery Shopper 2020 Insights



Corporate social responsibility encompasses a wide range of practices. Using the six pillars, brands and retailers can effectively meet the demands and expectations of their consumers.



For further information on POPAl's Sustainability Standard and the new Sustain environmental design indicator, please email sustainability@popai.co.uk.

Sources

¹ A Nation of Greens – Shoppercentric – September 2019

² Retail Gazette – December 2019

Access our complete report, including which POPAl award-winning displays were singled out by the judges.



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Benchmark

This powerful best-in-class search engine contains 2,500+ POPAI Award entries across all retail categories and formats since 2007.



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GLOBAL TRENDS

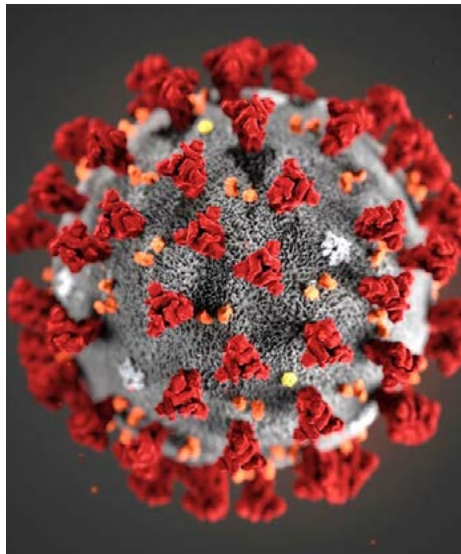
HOW CORONAVIRUS WILL CHANGE THE WAY WE SHOP



GDR is exploring the impact COVID-19 will have on consumer behaviour. Managing Editor, John O'Sullivan highlights how the pandemic will change the very nature of how we shop.

It is safe to expect that the legacy of coronavirus will have a game-changing impact.

The global pandemic has exacerbated certain problems, challenged consumers and businesses to make unexpected choices, and brought new solutions to the fore.



Hygiene transparency

During the pandemic, companies across myriad sectors have started releasing in-depth details about the lengths they are going to in order to maintain optimum hygiene levels for their staff and customers.

Will this level of process and information become the new norm going forward?

New store formats and high street configurations

We have been talking for years about how legacy retail is no longer fit for purpose in the modern era. Without wishing to be too fatalistic, it is clear that the pandemic is going to be the tipping point for many already struggling shops, retail formats, high streets and malls. Once the dust settles, we are going to have to answer some fairly fundamental questions about the role of physical retail in our lives, and our communities.

Will governments rethink the outdated systems that stifle physical retail and create new community-focused models where retail can flourish alongside other services and spaces?



The second rise of online

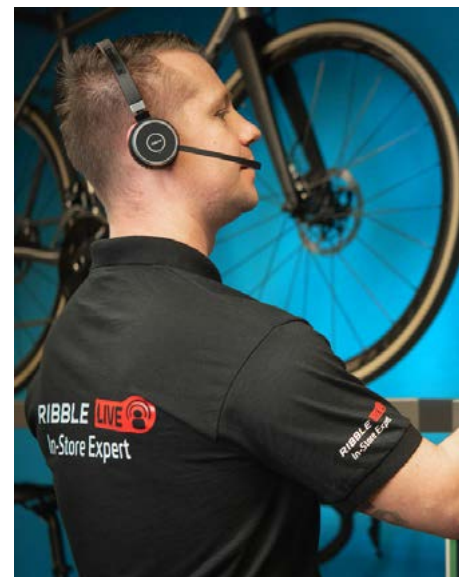
One of the most consistent features of retail in the last decade has been the tension between the decline of physical retail and the rise of online commerce. This struggle has been heightened by the current crisis. One of the clearest examples of this has been the growth of online grocery shopping as many shoppers have been reticent to visit physical stores.

Live streaming and social commerce

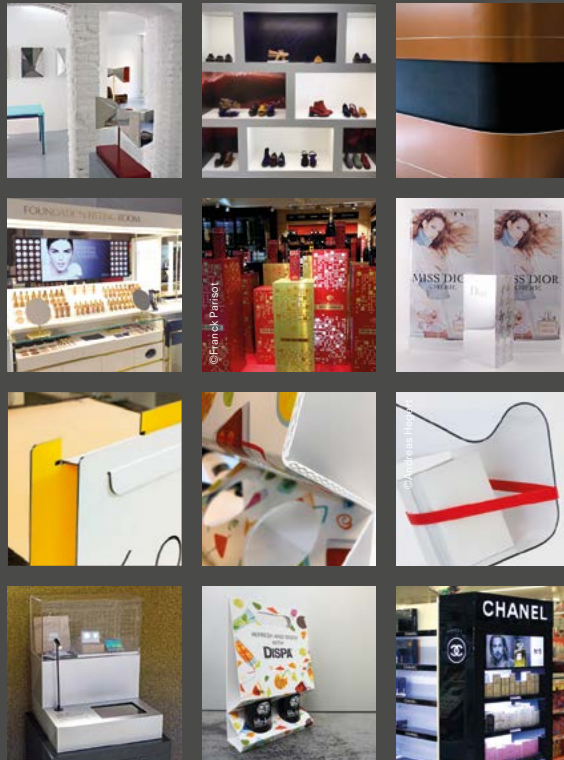
Also interesting is the way that the more experiential and less functional elements of e-commerce have taken centre stage during the crisis. Companies, including restaurants, beauty and fitness brands, and consumer electronics retailers, have been looking for more engaging and creative ways to interact with and sell to their customers in their own homes.

Contactless and segregated retail

Driven by hygiene concerns, many online operations have started offering 'no-contact' delivery for their at-home customers. At the same time, leading supermarkets around the world are starting each day with elderly-only hours to minimise the exposure of the most at-risk members of society.



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GLOBAL TRENDS

HOW CORONAVIRUS WILL CHANGE THE WAY WE SHOP



The changing nature of convenience

One likely effect of the pandemic is that it will force us to rethink convenience, both in terms of how we buy and what we buy.

A real growth area for supermarkets in recent years has been convenience formats, servicing shoppers making short-term purchase decisions based on what they need now or later today. After experiencing shortages of key items during the pandemic, will consumers revert to more traditional shopping behaviours based around longer-term meal planning, bulk buying and 'the weekly shop'?

Recession hardening part two

The recession in the last decade had a huge impact on shoppers' perception of value and quality, leading to the rise of retailers like Aldi, Lidl and Dollar General. The pandemic experience will likely reinforce this mentality in some shoppers, who will not only get used to living with less, but also with doing less. Will it usher in an era where people buy less and save more?

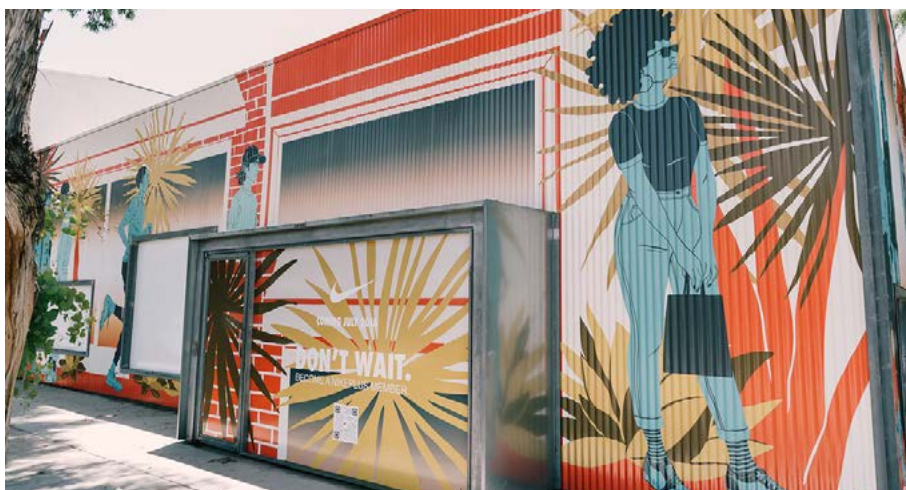
Access our complete report about how COVID-19 could change shopper behaviour forever.



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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 available to POPAI members soon.

To find out more, contact john@gdruk.com Follow GDR Creative Intelligence [@gdruk](https://twitter.com/gdruk) on Twitter and sign up to the weekly newsletter, Strategic Inspiration for Retail: <http://eepurl.com/dg5arH>

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