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| ISSUE 45 | 2021

POPAI
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Find out more

Welcome to the latest issue of our magazine.

As retail begins to slowly reopen across the UK, and we hopefully see a cautious end in sight to restrictions and lockdowns, where do we go from here? As retailers and shoppers, it's time for us to come together. To take the amazing Beatles song of 1969 and revamp it into our own 2021 version.

As shoppers, when the restrictions are lifted, it's time to spend. As a society, it's time to emerge. As an industry, it's time to do what we do best – work together. Collectively, we have the power to restore the fortunes of retail, giving the industry its own shot in the arm to move it beyond COVID-19.

And of course, we need to virtually come together for the first ever POPAlexpo. Combining industry-leading suppliers with a professional online user experience, it's a great way for exhibitors to find an effective and affordable route to market. We're really excited to be running this event, helping us all to see the brilliant and innovative ideas out there. We hope you can join us on 15 and 16 June.

Moving onto the magazine. Our first report on [page 5](#) takes a deep dive into the world of windows. These pivotal display areas can be the difference between attracting a shopper into store or sending them on their way. We looked at how retailers are using their windows, what type of display they were using, and how effective and eye-catching the displays were, ultimately asking: who were the clear frontrunners?

Meanwhile, the festive season in 2020 was arguably one of the most unusual in living memory. With retailers unable to tap into the usual large family gatherings for their promotions, it was a real balancing act for stores and shoppers alike. Our Storedits report on [page 9](#) explores how retailers promoted Christmas in store in the face of unprecedented challenge.

One thing we've missed through lockdown is a trip to the theatre. So, we decided to indulge our dramatic sides and delve into the POPAI Awards archive, finding the best show-stoppers and fine theatricals from the past five years. You can see our reviews on [page 13](#).

Finally, on [page 22](#) our GDR report explores the role of physical stores in the light of the pandemic, as e-commerce sales continue to climb. How can retailers adapt and build for the future?

Enjoy the issue!

Phil Day

POPAI



SHOPPER INSIGHTS

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SHOPPER INVESTIGATION



Windows

A pivotal area for retailers, a window display can draw in a shopper or send them on their way. We take a deep dive into the world of windows, asking: who are the clear front-runners?

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STOREDITS



Christmas in Grocery

Christmas 2020 presented challenges galore to the retail industry. Our report explores how retailers rose to meet these in store and who showed the most festive spirit.

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DISPLAY BEST PRACTICE



In-Store Theatre

Dramatic, disruptive and eye-catching...we love some in-store theatrical displays. Here, we delve back into the POPAI Awards archive to discover who the main actors were over the past five years.

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GLOBAL TRENDS



How COVID-19 is Changing the Role of Physical Stores

With the ongoing rise of e-commerce, how can physical stores adapt to remain competitive?

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

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SHOPPER INVESTIGATION

WINDOWS



In this Shopper Investigation, we look at how retailers are using their windows, what type of displays they are showing and how effective they proved at catching our shoppers' eyes.

Inviting, attractive window displays are more important than ever. As the high street continues to fight for its place at the top of shoppers' lists, retailers must use all the tools at their disposal to stay competitive.

Our research

We asked 100 shoppers to visit a selection of stores – Boots, Superdrug, LloydsPharmacy, B&Q, Wickes, Ryman, WHSmith, Dunelm, Wilko, Pets at Home and Pets Corner – and record the display mechanics and messaging found in the retailers' window displays.



Window shopping

Surprisingly, some stores had no window display at all. In the those that did, the displays which most grabbed our shoppers' attention were window posters. Meanwhile, product display also proved a popular mechanism. However, window vinyl was in extremely short supply, found in just five stores.

Windows are also a great place for retailers to display prominent messaging. It seems that most retailers were on message, with 70% of window displays featuring more than one promotional message.

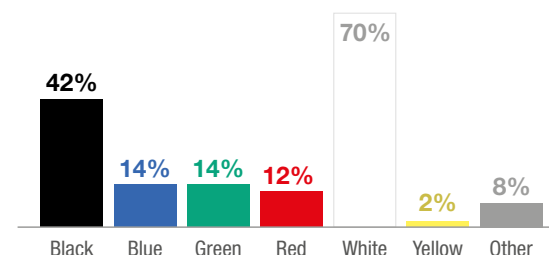
Many retailers had gone down the traditional hero promotion route of using seasonal campaigns, multibuy offers, products or price reductions and comparisons.



However, some shoppers reported seeing window displays with other hero promotions.

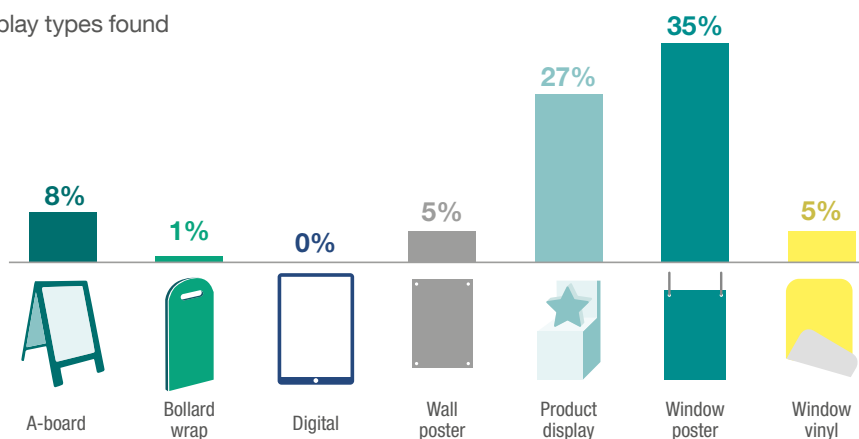
When it came to the most popular text colour in window displays, the answer was black and white. While 60 of the 86 stores with window display used white, 36 chose black. Background colours were a little brighter, with blue as the front-runner, closely followed by white.

Text colours used in window displays



Source: POPAI/Roamler

Display types found



Source: POPAI/Roamler

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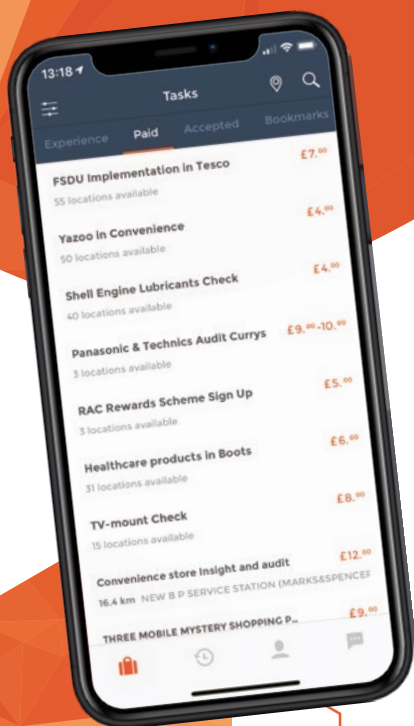
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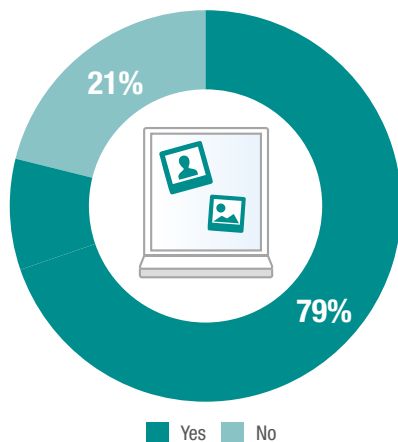
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SHOPPER INVESTIGATION WINDOWS



Use of imagery in window displays

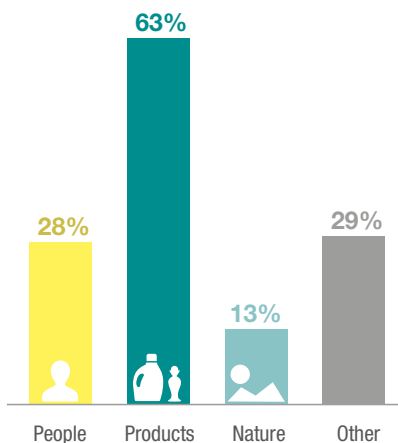


Source: POPAI/Roamlar

In the picture

Images were a key feature of most of the displays we saw. In fact, 80% of retailers incorporated imagery into their window displays, with product images the most prevalent across all stores.

Image content



Source: POPAI/Roamlar

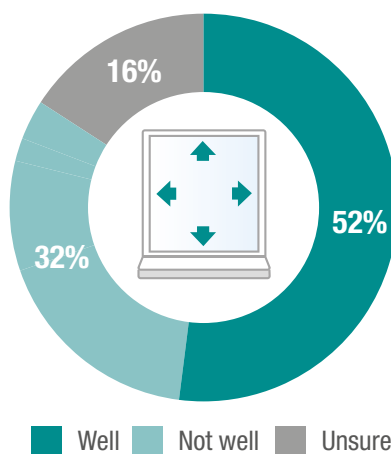
Shopper standout

When asked what stood out the most, our shoppers cited minimalistic displays, the use of bright colours and big imagery as some of the main things. Price promotions featuring large text and promotional messages appearing alongside the actual product also appealed to our shoppers.

Meanwhile, COVID-19 has continued to dominate our media's headlines, and this is reflected in the messaging in many of the retailers' window displays.



How well shoppers felt retailers had used their window space



Source: POPAI/Roamlar



Shopper ratings

Over half of our shoppers told us that they felt the retailer had succeeded in making the most of their space, while 32% felt they could have done better.

Suggestions for improvement on window display included using brighter colours, bigger P-O-P and actually placing the products in the window for better effect.

We were surprised to find window displays completely lacking in a number of the stores visited. However, most retailers made good use of their space, with shoppers citing imagery and colour as the main elements to grab their attention.



Access our report to see the full findings of our Shopper Investigation.



Read the **FULL REPORT**

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Facing 2021 Together

As the world slowly returns to near normal, there will be greater promotional opportunities within the UK & Ireland and it is vital that you partner with a manufacturer that will ensure your promotions perform through the supply chain and in-store.

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STOREDITS



CHRISTMAS IN GROCERY

As the pandemic once again took its toll on age-old traditions, our report looks at how grocery retailers chose to promote Christmas in 2020.

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

Christmas in grocery

In spite of the pandemic, Christmas was seen as a cause for celebration still, with 42% of Britons saying they were hoping to make it the 'best Christmas in memory'. December's supermarket sales came in at almost £12bn – a staggering £1.5bn increase from the previous year – with £1.3bn spent online.²

For the 12 weeks to 26 December, Lidl was the market leader in terms of retailer growth, followed by Morrisons.



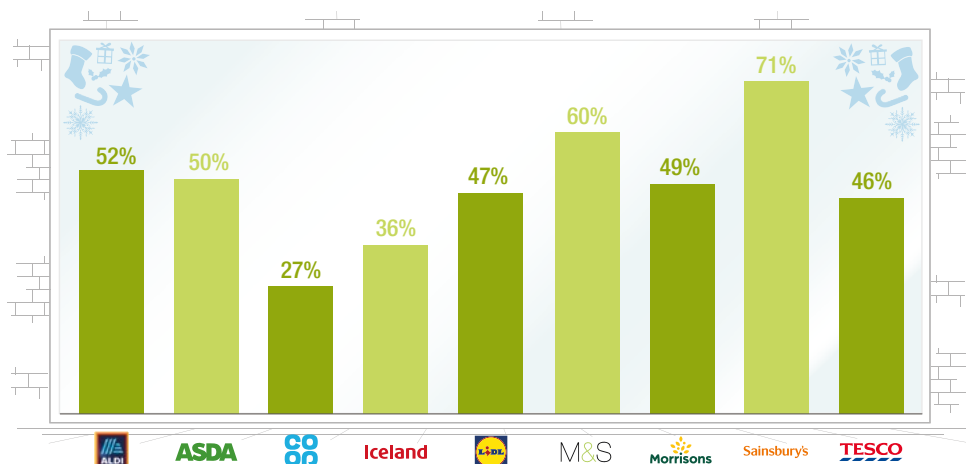
Our research

We visited 48 stores across 10 retail chains – Aldi, Lidl, Asda, Co-op, Iceland, Morrisons, Tesco, Waitrose, Sainsbury's and Marks & Spencer – to see how they were promoting and displaying their Christmas groceries.

Winter windows

Our supermarkets were all keen to attract shoppers in from the outset, with most dedicating a substantial amount of external or window display to their Christmas offerings. Rather surprisingly, we did find a few stores with no window or external display at all.

External or window display dedicated to Christmas (average percentage per retailer)



Source: POPAI Storedits

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STOREDITS

CHRISTMAS IN GROCERY



Tis the season

Most of our retailers used Christmas promotions early on in store, with all using the entrance area for promotions. Many retailers also have seasonal aisles which change their offering throughout the retail calendar.

Seasonal sparkles

Festive clothing made an appearance in most of our stores, with Asda and Tesco using 30% of clothing space for Christmas jumpers and other seasonal items, and Marks & Spencer not far behind with 25%.

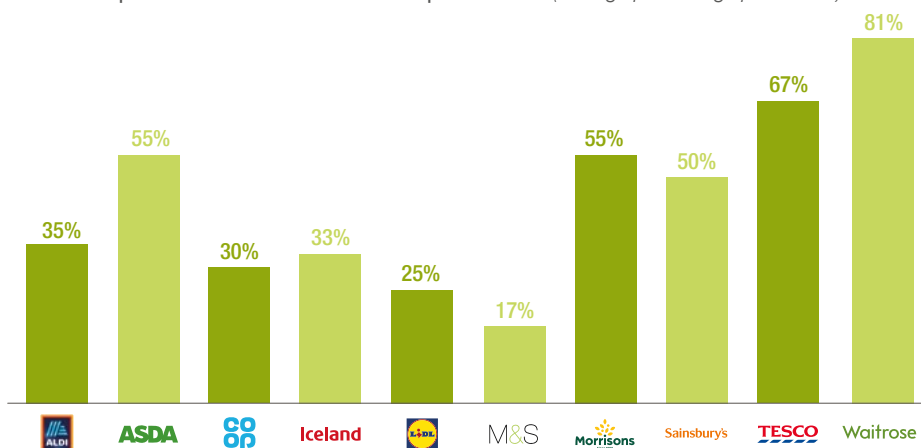


Christmas colours

Christmas tends to bring its own colour palette in store, and we noticed that, for over half of the stores we visited, white text was the preferred choice, followed by gold. Red was, perhaps unsurprisingly, the main choice of colour for background signage, again featuring in over half the stores we visited.

Most retailers stuck to tried-and-tested imagery, including Christmas animations, festive food spreads, gifts and presents, and those with links to their Christmas adverts.

Entrance space dedicated to Christmas promotions (average percentage per retailer)



Source: POPAI Storedits

P-O-P goes Christmas

Among 2D displays, we found the shelf barker to be the favourite, followed by a shelf strip and a fin/blade.

Retailers' 3D displays included dump bins, FSDUs, dressed bays, gondola ends and pallet stacks, mainly featuring either product only or price reduction.

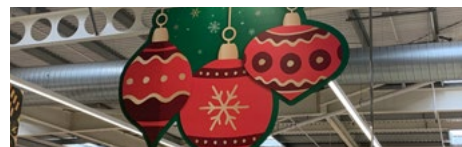


Most popular imagery was animations

Source: POPAI Storedits

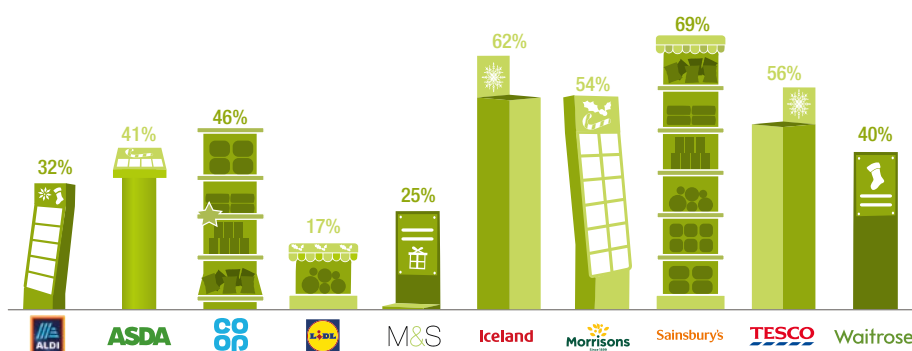
The festive factor

Finally, we asked our shoppers to give each store they visited a mark out of 10 for overall 'festiveness', with 0 being no festive factor and 10 being the ultimate festive factor. And the winner is... Sainsbury's, with an average score of 7.3 out of 10.



Christmas grocery shopping in 2020 was something of a mixed bag. In terms of in-store promotions, most retailers stuck to tried-and-tested promotions and formats. It seems that sales did not suffer as shoppers sought to create the 'perfect' Christmas. But will ever-discerning shoppers be seeking more in store for Christmas 2021?

P-O-P dedicated to Christmas (average percentage per retailer)



Source: POPAI Storedits

Sources

¹ UK Grocery Sales – Kantar – December 2020

² Online Grocery Sales – Retail Times – January 2021

Access our report to read the full findings about Christmas in grocery 2020.



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DISPLAY BEST PRACTICE

IN-STORE THEATRE



In-store theatre is a hugely effective way for retailers and brands to stop the shopper in their tracks. For this report, we delved into the POPAI Awards archive to discover the displays with the most drama.

DECORATIVE, SIGNAGE AND CAMPAIGN DISPLAYS

Usually two-dimensional installations, displays are used to create an atmosphere, often with seasonal or experiential themes.

Dressed to impress

These displays should maximise the shopper journey and create full-on decorative impact. This means dressing most, if not all, of the retail spaces, as well as turning attention to both internal and external display. Asda's spirited 2017 Halloween campaign scooped Bronze at the 2018 POPAI Awards. The judges were impressed with the way the campaign made full use of the space available, including gondola headers, hanging signs and floor graphics.

Dramatic designs

Most campaigns need a large amount of P-O-P. A variety of different, but related, designs can work together to maintain impact and reinforce campaign messages.

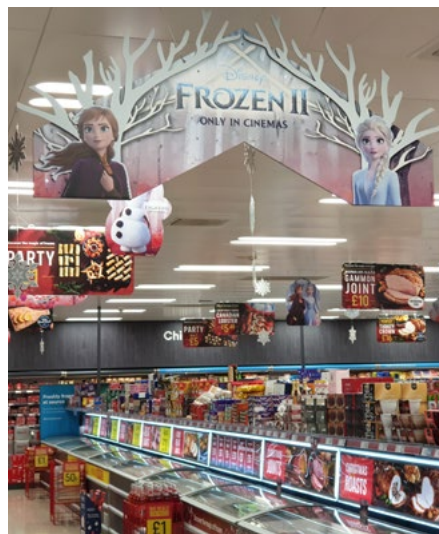
Scooping Silver at the 2020 POPAI Awards was the Disney Frozen 2 POS campaign for Iceland. The judges called this show-stopping campaign 'excellent' and said that 'each item feels part of a family'.

Star performance

ROI should be a fundamental part of nearly all P-O-P projects, including campaigns. The Universal HMV Hologram Installation won Gold in the Shopper Technology category in 2020. It delivered an impressive 20% uplift in sales during the period the campaign was live.



*The Delta Group with Creative Race, Asda Halloween 2017, **Bronze 2018** – Seasonal & Signage*



*HH Global, Iceland - Disney Frozen 2 POS, **Silver 2020** – Retail Services & Signage*



*Universal Pictures Home Entertainment, Universal HMV Hologram Installation, **Gold 2020** – Shopper Technology*



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DISPLAY BEST PRACTICE

IN-STORE THEATRE



THREE-DIMENSIONAL DISPLAYS

Highly impactful through their size, unusual design or animation, these displays are also merchandised with a significant amount of stock.

Deep impact

Theatre P-O-P is all about impact. Taking 'back to school' to a whole new dimension, the FruitShoot & MiWadi School Bus took the Gold in 2015. The display wowed the judges with its 'eyecatching, interactive and product friendly' design.

Take a bow

Theatre P-O-P needs to be very hardworking, delivering all the usual requirements of a display campaign but with extra pizzazz and flourish.

The Gillette Asda World Cup Stadium was a real game-changer. Scooping Bronze in 2019 in the Grocery & General Merchandise – Temporary Display category, the judges said it was a 'clever concept' that had 'great visibility in store'.

THEATRICAL DISPLAYS IN WHOLESALE

These three-dimensional displays are of even greater scale than their retail counterparts.

Built to scale

Displays need to fill the large spaces presented by wholesale and be flexible enough to work in more confined spaces, too. The Sensations Wholesale TukTuk WOW Display scooped Gold in 2018. The aim was to create maximum standout by the checkout, and the dramatic display delivered.

Taking stock

Bursting with vibrancy and energy, the Red Bull Sugar Free Activation took Bronze in 2018, wowing judges by creating a 'shop in shop' around the Red Bull stock. They commented that the display 'makes full use of the space afforded in the wholesale environment'.

Beyond the store

Branding is equally as important in wholesale as it is in retail, as is the relationship with any concurrent above-the-line campaign. This was evident in the Gold-winning wholesale display in 2019, the AB InBev Bud Castle. It was described as a 'fun and unique' execution that encouraged engagement with customers online.



OLIVER Agency, FruitShoot & MiWadi School Bus, **Gold 2015** – Short Run – Temporary Display



Communis in conjunction with Wilmot-Budgen, Gillette Asda World Cup Stadium, **Bronze 2019** – Grocery & General Merchandise – Temporary Display



InContrast, Sensations Wholesale TukTuk WOW Display, **Gold 2018** – Wholesale



DS Smith Retail Marketing, AB InBev Bud Castle, **Gold 2019** – Wholesale



Augustus Martin, Red Bull Sugar Free Activation, **Bronze 2018** – Wholesale



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- App-based
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- Event/seasonal-related

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Pandemic Safety Solutions

A special category recognising how retailers implemented safety, sanitisation and health-related solutions directly as a result of the coronavirus pandemic, in order to allow as near a normal shopper experience as possible.

- From any retail category
- Likely to be, but not limited to, permanent display solutions such as screens, guards, sanitisation and solutions to allow shoppers to try products.

Not eligible for Display of the Year

NEW

Pandemic Retail Experience

A special category recognising the innovative ways in which brands and retailers adapted to and managed the shopper experience during the pandemic of 2020.

- From any retail category
- Temporary or permanent display, navigation or signage
- Judges will be looking at the whole in-store experience
- Will include elements such as trust, loyalty, reassurance, communication and navigation
- Not hygiene or health & safety units

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DISPLAY BEST PRACTICE

IN-STORE THEATRE



INTERACTIVE DISPLAYS

These displays offer everything from photo opportunities through to fully interactive screens.

On target

Bright and colourful designs create high impact, like the Acqua di Parma Christmas campaign, awarded Bronze in the Shop in Shop category in 2017. The judges commended this display for its 'strong branding' and they liked the creative idea of a giant gift box theme to catch shopper attention.



Mad About Design, Acqua di Parma Christmas, Bronze 2017 – Shop in Shop



All-clear

One of the most effective ways to attract a passing shopper is to make sure they are in no doubt which brand is being promoted.

Winning Gold in 2015 in the Confectionery – Temporary Display category, the Lindt Christmas Advent Calendar impressed judges with its 'great brand standout' and 'clear seasonal design'.

Brands and retailers can look to these examples as top performers, bringing together all the essential elements to create a display with a certain extra something. A round of applause and a curtain call for our stars.



Once Upon A Time, Lindt Christmas Advent Calendar, Gold 2015 – Confectionery – Temporary Display

Access our complete report to find out more about the dramatic displays we found in the POPAI Awards archive.



Read the FULL REPORT

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Events 2021



We hope that in 2021 we will be in a position to hold our seminars in a physical format. If we are unable to do so, we will run sessions such as a webinars. Please follow updates on our website at www.popai.co.uk/events.

15 April to 6th May 2021
SPRING SHOPPER SEMINAR



Tuesday & Wednesday
15 & 16 June 2021
POPAI EXPO



Thursday **8 July 2021**
SUMMER SHOPPER SEMINAR



Thursday **16 September 2021**
AUTUMN SHOPPER SEMINAR



Tuesday **5 October 2021**
POP AI AWARDS DINNER 2021

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Wednesday **3 November 2021**
IRELAND IN-STORE BREAKFAST SEMINAR



Tuesday **7 December 2021**
WINTER SHOPPER SEMINAR



GLOBAL TRENDS

HOW COVID-19 IS CHANGING THE ROLE OF PHYSICAL STORES



GDR's Managing Editor John O'Sullivan explores how the growth of e-commerce and the proliferation of online logistics systems during the pandemic have changed the role of our physical stores.

The role of the physical store has now changed forever. We are firm believers that there will always be a place for physical stores in the omnichannel retail strategies of the future, but those locations will serve different purposes and come in different formats from the stores of the 20th century.



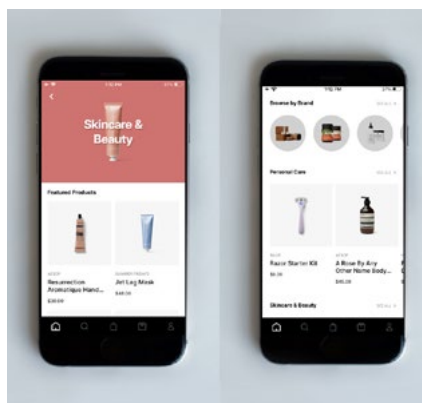
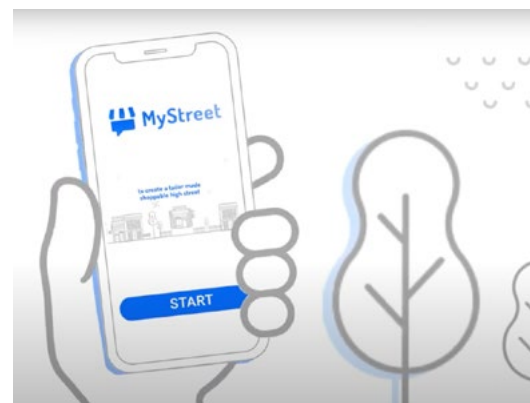
On-demand delivery and stores as fulfilment centres

One of the big lifelines for physical retailers during the pandemic, but potentially one of the big disruptors long term, has been the maturation of on-demand delivery.

As the UK entered its second national lockdown in October last year, for example, beauty brand Lush offered two-hour delivery via Stuart to those living near its stores.

The potential and threat of dark stores

Other grocery stores in the US are closing some public-facing stores in favour of new dark stores. In some areas, they are essentially transitioning from traditional grocery stores designed to delight walk-in customers towards purely functional spaces with the sole aim of offering an efficient logistic hub for local e-commerce deliveries.



Digital tools that boost footfall and clicks

The pandemic has also accelerated the development of many digital tools that help physical stores sell to customers in their local area and beyond. British property group Grosvenor partnered with omnichannel retail platform NearSt to drive traffic to the stores in its London locations by inviting NearSt to feature its in-store inventory on the online platform.

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GLOBAL TRENDS

HOW COVID-19 IS CHANGING THE ROLE OF PHYSICAL STORES



Stores as e-commerce showrooms

Another key way that physical stores are supporting retailers' e-commerce strategies is by acting purely as showrooms to drive online sales. Pre-pandemic Chinese e-commerce giant JD.com launched E-Space in Chongqing where customers could test out 50,000 consumer electronics products before buying online through its app.

Arguably the most interesting COVID-inspired innovation in this space is the launch of Farfetch's Community Galleries, which were designed to entice customers back into enjoying retail in physical spaces. Held in Swire Hotels in China, each event is a pop-up hosted by a fashion influencer featuring a curated selection of their favourite products, which can be bought instantly online. This hints at a future where retail stores will not necessarily need to be fixed, permanent, full-time spaces, but anywhere that brands and retailers can engage with and delight their community of shoppers.

Flagships as the focal point of global communities

One of the strongest indicators that physical stores still have an important part to play in the omnichannel retail of the future is the sheer number of tech-led e-commerce innovations built around the notion of a physical space. When Dior's flagship Champs Élysées boutique in Paris was closed during the pandemic, it created a virtual, shoppable version that e-commerce customers could browse.

The gold standard for virtual stores, though, undoubtedly comes from Japanese beauty retailer @Cosme, which created a virtual version of its two-storey Harajuku flagship that merges a Google Street View-style walkthrough with 360-degree augmented reality.



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 on Twitter and sign up to the weekly newsletter, Strategic Inspiration for Retail: <http://eepurl.com/dg5arH>

Access our report to find out more about how COVID-19 is changing the role of physical stores.



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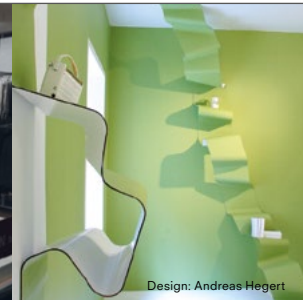
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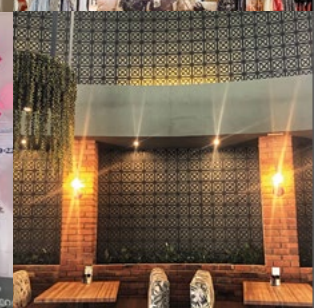
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