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ISSUE 46 | 2021

POPAI
PART OF THE shop! GLOBAL NETWORK

IN-STORE INSIGHTS

RESEARCH REPORTS

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100% INTERNATIONAL RETAIL EXPERIENCE SOLUTIONS

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

At POPAI, we've always prided ourselves on understanding our industry's needs, being champions of innovation and sustainability and offering professional forums where our members can engage.

There's no skirting around the fact that the last 18 months saw the rug pulled unceremoniously out from under our feet. Which meant that our usual calendar of events and our Awards had to undergo a major revamp.

On which note, I hope you all enjoyed our first-ever POPAIexpo. Bringing together industry-leading suppliers with a professional online user experience, we were the innovators extraordinaire for the industry. It was a fantastic live experience packed with speakers, ideas and initiatives. You can find out all the news in our special report on **page 13**.

The two main features of the show were innovation and sustainability - clearly watchwords of the moment, as these are two of the most sought-after categories in the POPAI Awards. Now in its 15th year, we're celebrating with a fantastic record number of entries, standing at almost 230. And we are looking forward to the event with hope, already selling tickets to the **Gala dinner on 5 October.** See you there?

Now to the magazine, and we have our usual mix of informed insights and research. First up, who doesn't love a discount store? Not too many of us by the looks of things. Our investigation into this ever-growing category shows one thing is abundantly clear: competitors must not discount the discounters. Read the report on **page 5**.

Our Shopper Intelligence report on **page 9** takes an in-depth look at the often-overlooked world of secondary display. Enjoying a brief surge in popularity during early lockdown, the report looks at the role of this display, how retailers can harness it to best effect and, crucially, asks: who is shopping secondary?

Consumer electronics are with us pretty much all day every day. From your fitness tracker to your phone, your TV to your kettle, it's hard to imagine them not being in our lives. But with such a vast array of products and ranges, it's essential that retailers know who they're targeting. Our Shopper Segmentation report on **page 23** outlines the eight most common type of consumer electronic shopper, helping retailers to effectively power their promotions.

Finally, on **page 27** our GDR report explores how some retailers are doubling down on the way they use their physical spaces to create places omnichannel shoppers want to spend time. Welcome to the new era of culture club retail.

Enjoy the issue!

Phil Day

POPAI

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IN-STORE INSIGHTS

www.popai.co.uk

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.

Membership

Becoming a POPAI member is simple: just go to popai.co.uk/whyjoin. You will receive a personal account that allows you to access all of our premium content with exclusive access to the full POPAI research archive.

Get in touch. We're always keen to hear your views.

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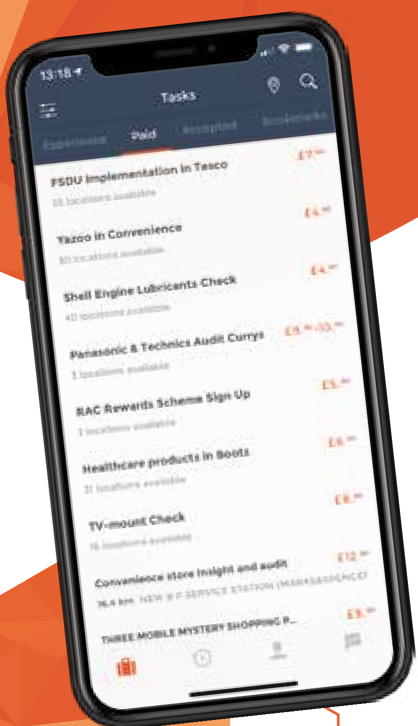

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DISCOUNTERS

SHOPPER INVESTIGATION

Once seen as the domain of the cheap but not cheerful, discount stores have made an epic rise in popularity over recent years.

As bargain-loving Brits continue to seek ways to reduce their shopping bills, so the ongoing rise of the discounters continues. This growing industry was worth £11.1bn in 2020 and is estimated to be worth £12.6bn by 2022. By then, discounters are expected to have a 5.8% share of the overall UK grocery market, growing at four times the pace of the rest of the market combined – a clear sign for competitors to sit up and take notice.

Shopper habits

We asked our shoppers about their shopping habits at discounters. Half said they used a discount store once a week, while 22% visited at least twice a week. The discounter stores our shoppers used on a monthly basis were Aldi, Lidl and B&M.

Food was by far the most popular purchase, with 88% of shoppers buying biscuits, crisps and snacks, and 83% of shoppers choosing tinned food, packets and cereals.

Our research

We asked 102 shoppers to visit a selection of the following discounter retail stores: Aldi, Lidl, Poundland, Poundstretcher, B&M and Home Bargains.

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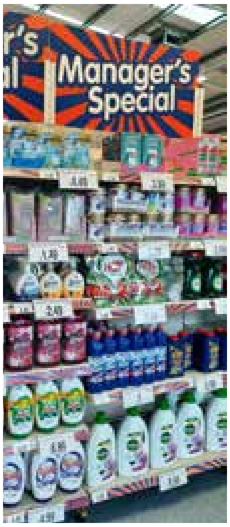
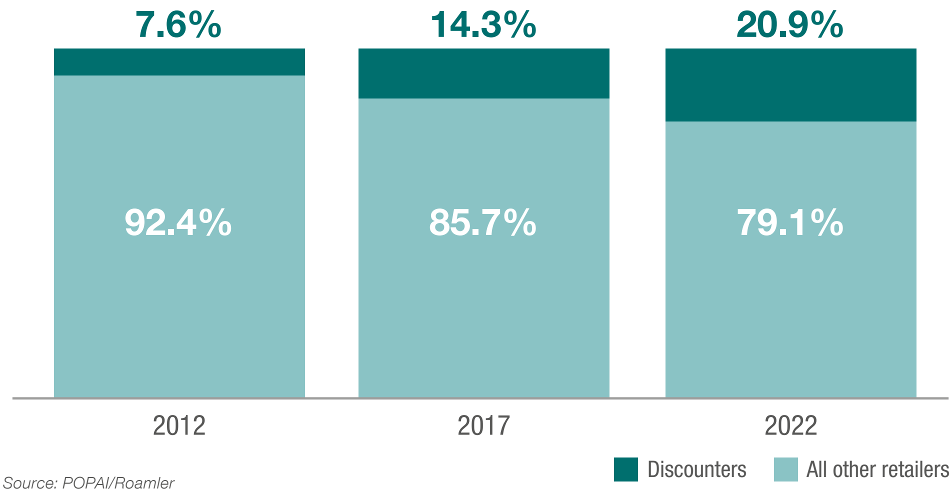


Share of the retail parks market held by discounters in the UK from 2012 to 2022



Source: POPAI/Roamler

First impressions

Windows are often the first place shoppers look, and promotional messaging here can help lure them into the store...or not.

Of the stores visited, 41% used price promotion for their key window messaging. Meanwhile, 32% opted for seasonal window messaging.

It was abundantly clear from our shopper answers which display types were most prominent when first entering the store, with 39% telling us they instantly noticed a gondola end display or bulk stack.

Free-standing display units were also eye-catching. Messaging was fairly mixed – most shoppers noticed price promotion, save and new products

DISCOUNTERS
SHOPPER INVESTIGATION

On average, three pieces of promotional material were found by our shoppers in the discount store windows

Source: POPAI/Roamler

Inside the store

In and around the store, end-of-aisle display, free-standing display units and shelf-edge signage were the most frequently seen display types. The least prevalent in-store displays were digital screens and floor graphics.

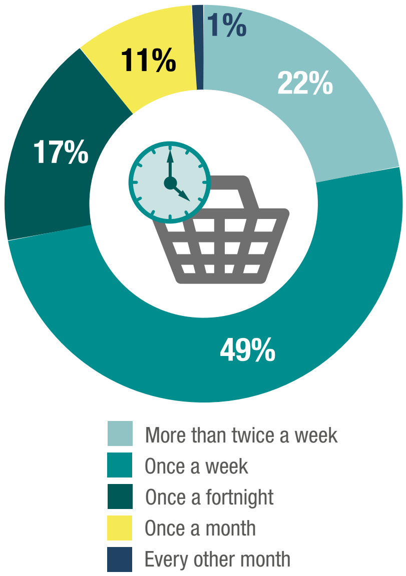
When we investigated the promotional messaging used in store, the answer was overwhelmingly 'price'. This messaging was found in three-quarters of stores visited, with 'save' the next most popular message.

Navigational signage was found in 57% of stores, leaving a rather surprising 43% with no directional signage at all. However, the same number – 43% – of shoppers said it was 'quite easy' to find their way around.

According to our shoppers, midway into the store was the favourite positioning by far for seasonal messaging, adopted by a convincing 59% of stores.

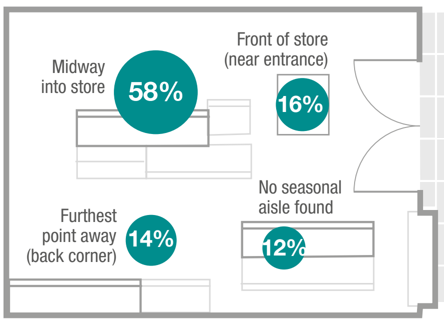
The queue and checkout areas proved to be extremely popular places for discounters to display products, a practice adopted by a staggering 97% of these retailers.

How often our shoppers shopped in a discount store



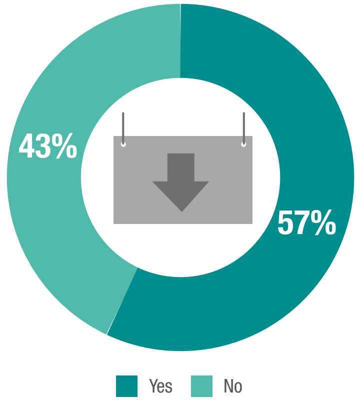
Source: POPAI/Roamler

Location of the seasonal aisle in store



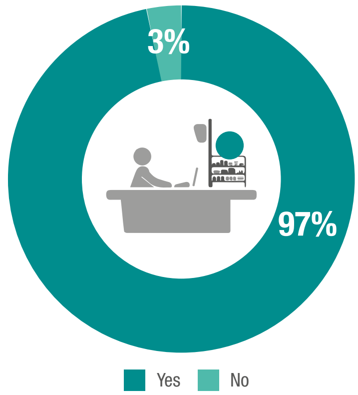
Source: POPAI/Roamler

Navigational signage found in store



Source: POPAI/Roamler

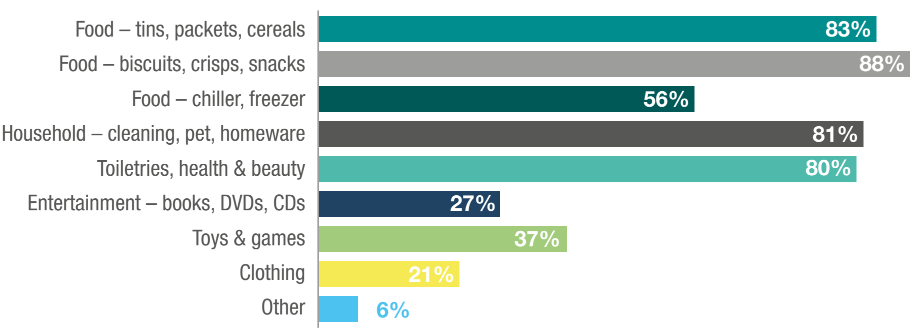
Products found on display in the queue area



Source: POPAI/Roamler

Our research suggests that discounters are doing most of the right things to attract shoppers, convey price and sale messaging, and encourage additional purchases in store. The discounters are here to stay.

Products purchased by our shoppers in discount stores



Source: POPAI/Roamler

Sources

[1] *Roamler*
[2] *IGD, March 2021 IGD.com*
[3] *Statista*

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

Read the **FULL REPORT**

Become a POPAI member.
Visit: **www.popai.co.uk** to sign up online.

SECONDARY DISPLAY

SHOPPER INTELLIGENCE

Secondary display, as the name suggests, is often overlooked by shoppers in favour of the main aisles. But clever use of this type of display by retailers can pay dividends.

***Shopper Intelligence** provides consistent, tracked shopper metrics that help retailers and brands better meet the needs of their shoppers.*

Shopper Intelligence
Understand. Influence. Lead.

During the first COVID-19 lockdown in 2020, retailers saw something of a seismic shift. Panic buying led to low stock and empty shelves, and the traditional methods to entice shoppers to buy more were replaced by restrictions and product purchase limits. One short-term trend in the height of this lockdown was an increase in purchases from secondary display. However, as availability quickly rose, these figures decreased again. An interesting question to pose is this: is it possible to return to these higher levels during 'normal' times? This could be a challenge, perhaps. But this shift in behaviour during lockdown has proved that secondary display not only has a place in store, it has an extremely valuable role.

Purchasing from secondary display increased during lockdown

Source: Shopper Intelligence

Who is shopping secondary display?

Understanding how behaviour and attitudes change when a shopper buys from a display is the first step in meeting the challenge of creating winning secondary displays and encouraging shoppers to stop, look and buy from them. Identifying these aspects can help point to some consistent traits to drive secondary display success.

Shoppers more likely to engage with and buy from secondary displays tend to be younger, less affluent and less loyal shoppers.

SECONDARY DISPLAY

SHOPPER INTELLIGENCE

Displays need to have broad gender appeal to maximise opportunities.

What do these shoppers want?

While price is important, shoppers are likely to be looking for other factors such as premium quality, innovation and authenticity.

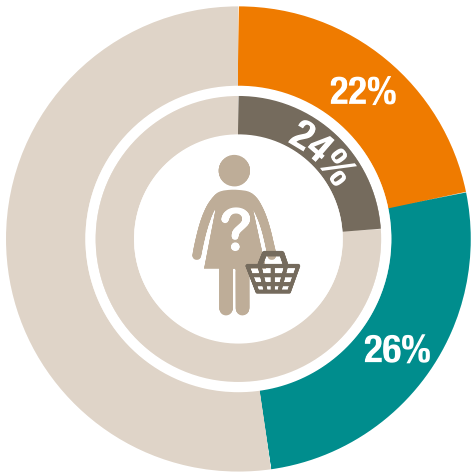
Clearly though, not all categories are equal. Retailers need a deeper dive to successfully prioritise where to invest. The best way to do this is to compare the categories, looking at impulsivity and incrementality.

Clearly, appealing to the younger shoppers would be a good starting point for retailers in creating a secondary display strategy.

Unsurprisingly, 'high impulse and high incrementality' categories, such as everyday chocolate confectionery, are going to be very strong candidates for secondary display. At the other end of the spectrum, categories like root vegetables which have 'low impulse and low incrementality' would not benefit from a secondary display strategy. Between these two extremes, the remaining categories, which are either strongly impulsive or strongly incremental but not both, will also need different approaches.

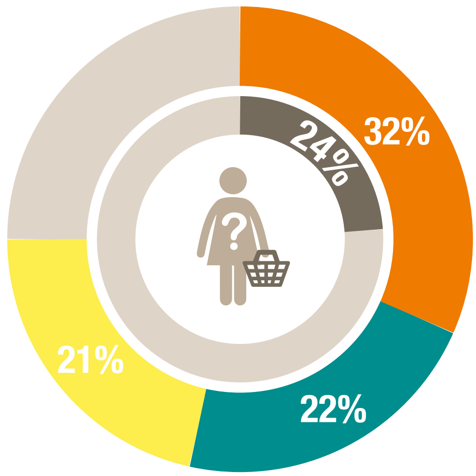
Any price messaging should have clear standout on displays to help appeal to these shoppers.

Shoppers purchasing from secondary display (affluence)



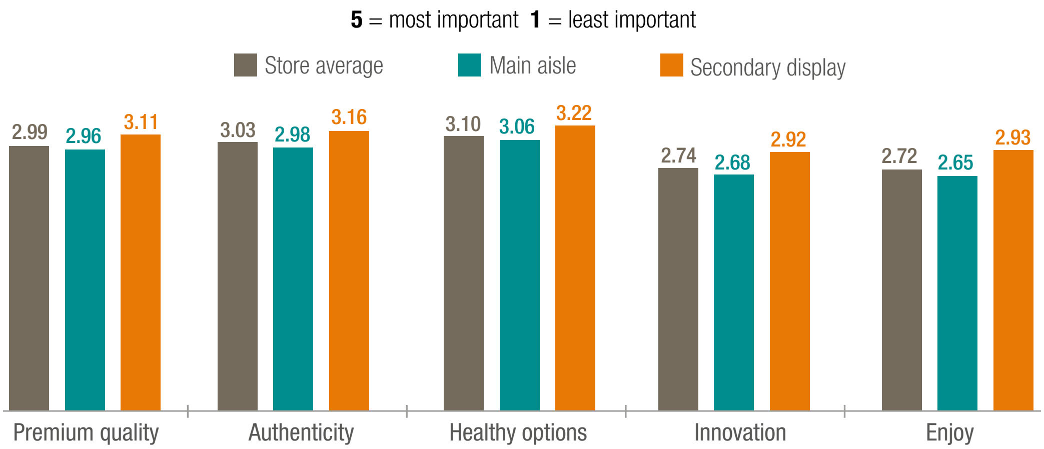
Source: Shopper Intelligence

Shoppers purchasing from secondary display (age)



Source: Shopper Intelligence

Decision drivers when shopping



Source: Shopper Intelligence

All data in this article is © Shopper Intelligence and refers to shopper interviews conducted in May to September 2020. Unless otherwise stated, data refers to All Categories – Total Grocery Channel, and sample size is n=39,461.

*For more thoughts on this discussion and to find out more about Shopper Intelligence, please visit **www.shopperintelligence.com** or contact **Chris Adkins** at **chris.adkins@shopperintelligence.com**.*

Access our complete report to find out more about secondary display.

Read the **FULL REPORT**

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POPAIexpo

EVENTS

In response to the ever present need to bring the industry together and assist both sides of the client-supplier relationship, POPAI announced its first-ever virtual exposition which took place on 15 and 16 June 2021.

The event was designed to bring the retail industry's leading suppliers straight to your desktop, enabling visitors to engage with the world's most dynamic supply chain in an accessible, convenient and easy-to-use format.

ON-DEMAND CHANNEL

Normally reserved only for POPAI members, this exclusive channel was for expo visitors to watch pre-recorded case studies from retailers, brand owners and supply chain industry leaders.

INSIGHT SEMINAR CENTRE

Day 1

10am .... Retail Design Workshop
11am .... Innovation Station 1
12:30pm ... POPAI Awards Nominations Announcement
2pm .... Sustainability Showcase 1

Day 2

10am .... Retail Design Workshop
11am .... Innovation Station 2
12:30pm ... Sustainability Spotlight
2pm .... Sustainability Showcase 2

EVENT KEY FEATURES

INNOVATION HUB
Packed with new, innovative products and services

SUSTAINABILITY ZONE
A zone dedicated to exhibitors with a key focus on sustainability

INSIGHT SEMINAR CENTRE
Live and on-demand content streams

An event atrium guided visitors to different areas of the event.

EXHIBITOR DIRECTORY

A central exhibitor directory enabled visitors to easily navigate their way around the event.

M101 | 100 Percent Group Ltd

Launching A New Retail Experience? We Make It Happen In-Store.

M102 | 3A Composites GmbH

3A Composites is the leading manufacturer of high-quality sheet materials for unique retail worlds.

M103 | arken POP International Ltd

Design, Develop, Manufacture, Everything Happens Here!

M104 | Delta Group

Visual communications specialist, delivering award-winning POS activations to Retail and FMCG brands.

M105 | Meiyume

Create data-driven and enriching consumer experiences through our retail displays and digital solutions.

M106 | SMF

Design, manufacture and installation of unique solutions for ambient and chilled products.

M107 | Maxim Design Group

Maxim designs, develops and implements innovative solutions for retail display and point of sale.

M108 | Big Group Retail Ltd

An insight-driven, retail design agency embracing innovation to partner with brands with big plans.

M109 | Scala

Leveraging emerging technology, Scala creates infinitely customisable, award-winning solutions.

M110 | MediaZest

Award-winning Audio-Visual solutions for Retail.

POPAI Awards 2021 | The Nominations

We've announced the nominations for the POPAI Awards 2021!

The POPAI Awards celebrate creativity, innovation and excellence in store and throughout the shopper experience.

Winning a POPAI Award is highly prized by industry clients and suppliers alike.

Download the nomination book and view the Awards gallery on the POPAI website. **www.popai.co.uk/awards**

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SHOPPER INSIGHTS

BOXFILE

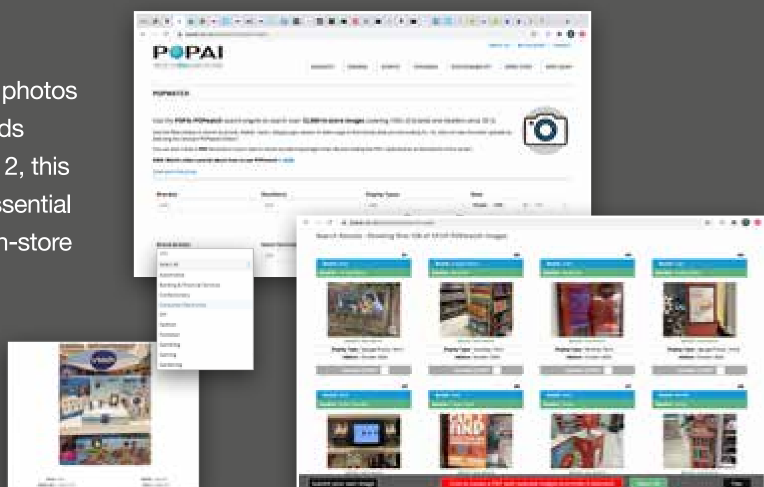
This search engine contains over 500 case study presentations, insight reports, global retail trends and magazine back issues.

BENCHMARK

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

POPWATCH

With 13,000+ in-store photos covering 100s of brands and retailers since 2012, this search engine is an essential tool for scanning the in-store environment.



www.popai.co.uk

M111 | CHEP

Sell More With Less.

M112 | Sigma

The Experts at Transforming Retail Space – Rolling out in-store brand projects to bring your stores to life.

M113 | ISI Global

Providing one touchpoint for integrated retail solutions globally.

M114 | Roamler UK Ltd

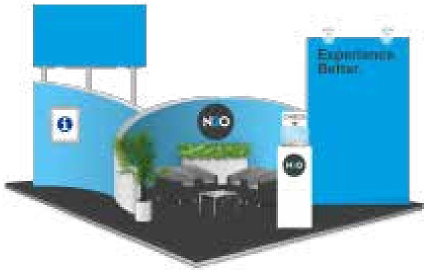
Roamler Field Marketing, changing the way people work through flexible resourcing.

M115 | Weedon PSC Ltd

The UK's leading independent manufacturer of temporary POS displays.

M116 | ARNO Group

Helping you create unforgettable brand experiences – store design, shop-in-shop, displays, digital.



M117 | N2O Limited

We win fans for brands in retail, with our unique mix of sampling, experiential and influencer marketing.

M118 | Integrity Lighting Solutions

Integrity is a dynamic lighting company designing and creating bespoke lighting for POS and retail.

M119 | Briggs Hillier

Global retail design agency partnering with brands and retailers to translate strategies into physical spaces.

"I have worked with a huge number of shopper agencies over the years, but have never come across a team who are so passionate about what they do. If you are looking for an agency that understands your retail, your shoppers and consumers, then seriously look no further than Folk."

Michael Haynes
National Account Controller, Jacobs Douwe Egberts

There's no need to shout

The brands that shout loudest might get heard. But the ones who speak smartest make people listen. Talk to us about a better way of thinking and **we'll help you be better too.**

FOLK

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M120 | Outform

The UK's leading independent manufacturer of temporary POS displays.

M121 | Channel Assist Ltd

Full-Service Agency covering Merchandising, Installation, Maintenance, Smart Fixtures and Field Sales.

M122 | Samsung

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M123 | Aire Design

We design Point-of-Sale that sells. Disruptive, inclusive and sustainable POS for brand owners.

M124 | McGowans Print

Innovation Change Sustainability.

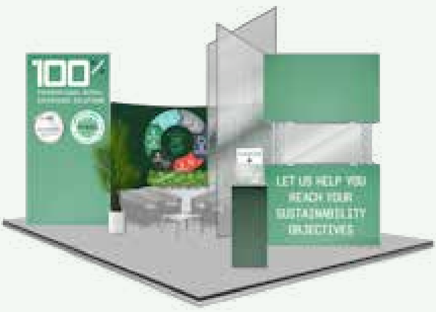
M125 | Hollogram Virtual Exhibitions

We design, build and host Virtual Exhibitions ...in fact you are in one our events now!

SUSTAINABILITY ZONE EXHIBITOR DIRECTORY

S101 | Easypack Displays

Delivering brand impact through creative and sustainable 3D displays.



S102 | 100 Percent Group Ltd

Let us help you reach your sustainability objectives.

S103 | 3A Composites GmbH

3A Composites is the leading manufacturer of high-quality sheet materials for unique retail worlds.

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The Digital In-store WORKSHOP

Tuesday 7 September 2021
London | 9:30am to 4:00pm

This specialist workshop will help shopper marketing professionals understand and navigate the minefield of how to select, strategise, plan and measure the various digital technologies available in today's retail environment.

Led by POPAI with expert panellists and case studies from across today's broad retail spectrum, the day will pivot around interactive, focussed sessions. We will break down the lifecycle of digital shopper activations into tangible, manageable chunks, whilst also looking at the nuts and bolts of how shopper tech can be used in store.

As well as having the opportunity to network, interact and share best practice with our panel, contributors and fellow delegates, attendees will also receive our Complete Guide to Digital In Store. Including all case studies from the day, as well as checklists and top tips, this guide will provide the perfect framework around which to build successful, and appropriate, digital shopper activations.

Places are strictly limited to 50 delegates
Please book early to avoid disappointment

Members: £249 | Non-Members: £475

Book now: popai.co.uk/events

Session overview:

AM – Building the business case

- Shopper engagement
- Strategy
- Planning & execution
- Measurement

PM – Understanding the tech

- Digital signage hardware
- Software behind the screens
- Content
- Mixed reality & the shopper's screen

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S105 | Pyramid Display Materials

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Sign and Display Brands.
Introducing our Envirobox V.2.

S106 | mint Ltd

A Sustainably-focussed design and manufacturing provider to the world's best brands and retailers.

S107 | Delta Group

Visual communications specialist, delivering award-winning POS activations to Retail and FMCG brands.

S108 | DS Smith Retail Marketing

We deliver world-class 3D POS through our expertise, smart creative and sustainability first ethos.

S109 | Maxim Design Group

Maxim designs, develops and implements innovative solutions for retail display and point of sale.

S110 | HH Global

HH Global is the largest and most sustainable outsourced marketing execution provider in the world.

S111 | Neschen Coating GmbH

Neschen Coating GmbH, international company for modern self-adhesive media and coating solutions.

S112 | Klöckner Pentaplast

Smart solutions to meet your sustainability goals.

S113 | Roamler UK Ltd

Roamler Field Marketing, changing the way people work through flexible resourcing.

S114 | ARNO Group

Your partner in reducing environmental impact without compromising the retail experience.

BOXFILE

Use the POPAI **Boxfile** insight search engine to view the presentations from **POPAIexpo**.

www.popai.co.uk/boxfile/search.aspx

STUDENT DESIGN AWARD 2021

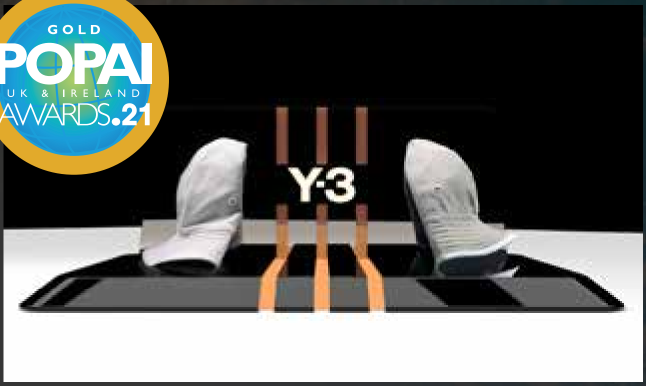
UK

Jessica Holmes
De Montfort University
'Taste the Tonic' Bar – Fever-Tree

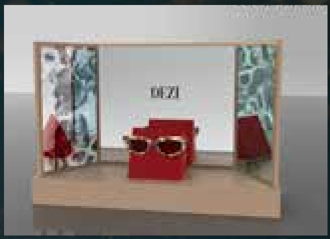
Charlotte Wright
De Montfort University
Little Moons – Bitesize Adventures Counter

Megan Evans
De Montfort University
Apple Watch – Series 6

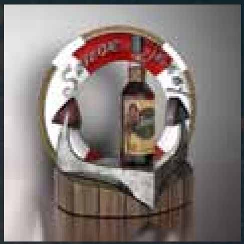
INTERNATIONAL



Kyle Arby Santos
California State University, Long Beach
Y-3 Bucket Hat Display



Daisy Ramirez
California State University, Long Beach
Dezi POP Display



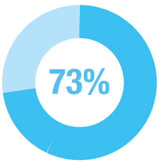
Alison Yanacek
California State University, Long Beach
Sailor Jerry Rum Display

To find out more about the Student Design Award, visit www.popai.co.uk

CONSUMER ELECTRONICS

SHOPPER SEGMENTATION

Consumer electronics – electronic products bought for the home or for personal use – is a massive industry. In this report, we take a deeper dive into the market and reveal the eight categories of shopper which retailers and brands should be aware of.



73% of consumer electronic sales were made online

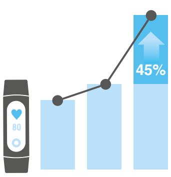
Source: Kantar, 2020

1 in 3 UK consumers cut their spending by half during lockdown

Source: WARC, 2020

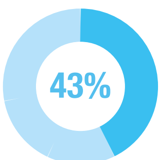
The world of consumer electronics

Imagine life without a smartphone, a TV, a kettle, a computer. When we consider the number of electronics we use in our daily lives, it is no wonder that the consumer electronics market is thriving. In 2021, revenue in the market amounted to £21.9bn. This is set to increase, with the market expected to grow annually by 1.35% (compound annual growth rate 2021-2025).

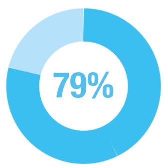


45% sales increase of fitness trackers during the pandemic

Source: Currys PC World



43% have purchased products on their smartphones while looking at the same products in store



79% expect a retailer to offer multiple ways to purchase with a smartphone online, buy-online-pick-up-in-store, or buy-in-store-ship-to-home

CONSUMER ELECTRONICS

SHOPPER SEGMENTATION

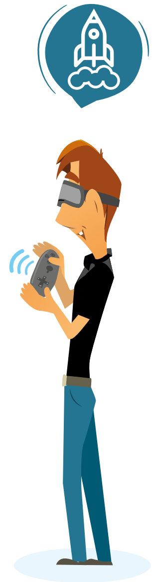
WHO'S BUYING?

It is clear that consumer electronics retailers and brands have massive opportunities to tap into this ongoing demand for their products. But with such a wide range of items with varying functions, getting it right is no mean feat.

Here, we have taken an in-depth look at who is buying consumer electronics, and have identified eight main types of shopper.

Tech Innovators

These shoppers are into one thing: the latest technology. They want the latest gadget, whether it is a mobile phone, tablet or new gaming system. It is all about the brand and being the first to experience it.



Researchers

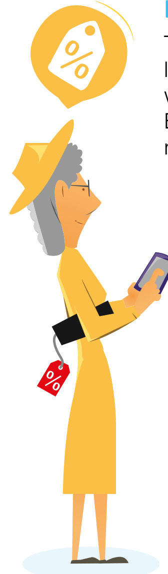
As the name suggests, these shoppers will research every aspect of a product before making their purchase. They like to be fully informed so will usually have undertaken a lot of research online already and have read customer reviews before setting foot in store.

Prudent Purchasers

These shoppers are looking for products that can fulfil their needs now and continue to do so in the future. Not ones to rush into major spending decisions, they choose carefully and must feel confident that they are making the right choice before they part with their cash.

Infrequent Big Spenders

These shoppers are not often in store. In fact, they only purchase once a year at most. Infrequent Big Spenders are looking for one big purchase or several big purchases at the same time.

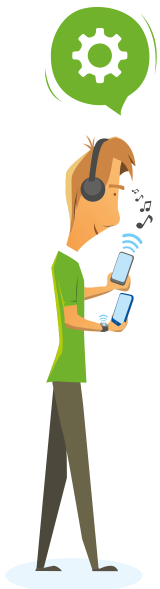


Bargain Hunters

These shoppers are out looking for a deal. Often without big budgets to spend, Bargain Hunters want value for money and then some.

Function Focussed Shoppers

These are smart shoppers, not influenced by flash advertising and branding. They can cut through the noise and see a product for exactly what it is and what it has to offer.



Browsers

These shoppers are not in store to shop for consumer electrical products or for any real purchasing reason. In fact, they are simply there to kill time before meeting friends for lunch, were just passing on their way somewhere else, or just mooching around on a Saturday afternoon.

Spontaneous Spenders

These shoppers are time poor. They spend most of their time at work or with family and friends. They are likely to be young, career minded and have plenty of disposable income, so will splash the cash on the right product when they find it.

Access our complete report to find out more about the eight types of shopper.

Read the **FULL REPORT**

Become a POPAI member. Visit: **www.popai.co.uk** to sign up online.

CULTURE CLUB RETAIL

GLOBAL TRENDS

In this report we look beyond technology to consider how brands and retailers are doubling down on the strengths of physical spaces to create stores where today's omnichannel customers want to spend time. Welcome to Culture Club Retail.

THE CLUBHOUSE APPROACH

There are two key ways that companies are buying into Culture Club Retail. The first is The Clubhouse Approach. By merging retail space with dining, leisure pursuits and networking opportunities, brands are giving their VIP customers permission to dwell and offering them a share of ownership over the space.

Diesel has launched a new store concept in Shanghai that mixes retail with dining. The Brave Bar takes up about one quarter of the store's footprint. It is positioned in the middle of the location, with the store's retail offer taking place around the outside edges. The brand sees it as an attempt to build a store around human connections, rather than the explicit act of buying products.

High-end British cycling brand Ribble has opened a state-of-the-art 2,000sqft showroom to act as a focal point for its local and online community. Each of the brand's bike models is positioned on a neon light box plinth to elevate it to the level of a priceless museum artefact. Digital screens next to each bike allow in-store customers to find out more information and watch videos about the product. The space will also be used as a virtual showroom by the Ribble Live team of experts.

Cultural Showrooms

The second part of this report explores the Cultural Showrooms that lean on the theatrical possibilities of physical retail to create engaging showrooming opportunities. These retailers and brands create unique journeys or experiences for shoppers that amplify their core values and attitudes.

Japanese telecoms provider KDDI has opened an eye-catching and immersive flagship in Ginza, Tokyo, which is half store, half exhibition space. The three-storey 'GINZA 456 Created by KDDI' location has a traditional sales space on the top floor, but the bottom two levels are built around theatrical, tech-infused displays that sell the possibilities of 5G.

Retailers and brands should be looking to future-proof their store estates by merging an e-commerce-first omnichannel approach with flagship spaces like these built around Culture Club Retail.

Access our complete report to find out more about Culture Club retail.

Read the **FULL REPORT**

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

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For Suppliers

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