

NON-MEMBER  
EDITION

| ISSUE 47 | 2021

**POP**AI  
PART OF THE **shopi** GLOBAL NETWORK

# IN-STORE INSIGHTS

## RESEARCH REPORTS



### SPORTS & OUTDOOR RETAIL

#### SHOPPER INVESTIGATION

What shape is the world of sports and outdoor retail in?



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### CAMPAIGN & EXPERIENTIAL

#### DISPLAY BEST PRACTICE

Who delivered an unforgettable experience to shoppers?



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#### GLOBAL TRENDS

Where physical stores are an extension of the digital experience.



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DEDICATED TO ENHANCING THE TOTAL SHOPPER EXPERIENCE

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At 100% we are committed to reducing the impact retail marketing products make on our planet. We believe that sustainable P-O-P should have the end-of-life mapped out from the start of its lifecycle.

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EXPERIENCE SOLUTIONS

## Welcome to In-Store Insights.

A time of personal reflection for me, as this month marks 15 years since I started at POPAI. And how things have changed...

When I first started, our remit — the shopper — was blissfully easy to define: 'a person in a shop'. The word 'omnichannel' was a typo, and sustainability wasn't a phrase. 'Shopper marketing' only appeared in written form with punctuation between it as it wasn't a thing either.

As a shopper, if you wanted something quickly, you drove fast to your nearest store. Next-day delivery often cost more than the product itself and you had no idea whether it would actually come. If it did and you were out, it could take days to retrieve it!

Physical retail was booming. Internet sales accounted for just 2.8% of total retail sales compared with almost TEN TIMES that today: 26.4%. Shops didn't need to try nearly as hard then to get shoppers into stores as they do now, and 'retail experience' was also a non-phrase.

On my first day at POPAI, I was given a Blackberry Pearl and a laptop weighing a ton. The iPhone did not exist. Brands and retailers didn't need to worry about their presence on social media. Why? Because there was none.

Perhaps the single most noteworthy point in the above is the seemingly off-the-rails pace at which the concept of sustainability has grown. Tomorrow's key decision makers place as much emphasis on the sustainable credentials and actions of brands as they do on the hard-fought brand equity and the product itself.

Over the same time frame, POPAI has evolved and developed, too. In 2006 we had a one-page website. Now we have insights search engines, on-demand conference presentations, online learning platforms and of course our flagship Sustain® eco-design indicator tool hosted on the POPAI website for the benefit of our members.

Events continue to be a mainstay of our output, albeit in virtual form recently, when the seminar in Manchester was our first face-to-face event in nearly 18 months.

*In-Store Insights* has also been something of a constant. We launched it back in spring 2010 to bring you all our latest reports and it's been going from strength to strength.

In this issue, we look at the world of sports and outdoor retail, with our [page 5](#) Shopper Investigation report asking: what shape is it in?

I mentioned above that 'retail experience' was previously unheard of. Now it's huge. In our Display Best Practice report on [page 9](#), we delve into the POPAI archives to see who offered shoppers an unforgettable experience.

Our Storedits report on [page 13](#) takes a closer look at the humble shelf edge. Or actually, the mighty shelf edge, one of the most powerful areas for P-O-P.

And we are seeing a new world of omnichannel retail, where physical and digital collide. In our Global Trends report on [page 17](#), we introduce you to the concept of the 'phygital playground'.

Before I sign off, it would be impossible to ignore our Awards, now a mainstay of best practice and promotion for our industry. Set up in 2007, with almost 3,000 entries over that period and over 800 award-winning executions recognised at our famous dinner, it's no wonder the Awards are affectionately referred to as 'The POPAIs' in brand and retail circles!

It's been a great 15 years. I wonder what the next 15 will bring?!

Enjoy the issue!

**Phil Day**, POPAI



## IN-STORE INSIGHTS

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## SPORTS & OUTDOOR RETAIL



### Shopper Investigation

How can retailers lure shoppers back in store? Our report looks at the bricks-and-mortar world of sports and outdoor retail, asking: what shape is it in?

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## CAMPAIGN & EXPERIENTIAL



### Display Best Practice

Delving back into the POPAI archives, we look at some of the best experiential winners over the years to discover who offered an unforgettable experience to shoppers.

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## SHELF EDGE



### Storedits

In our report, we explore this powerful place for P-O-P, offering in-depth insights into which displays have the edge.

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## PHYGITAL PLAYGROUNDS



### Global Trends

Here, we explore a new evolution of omnichannel retail, where brands and retailers are using their physical stores as a value-added extension to their digital experience.

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### [www.popai.co.uk](http://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

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Check & Fix  
↓  
On-Shelf Availability  
↓  
POS Placement  
↓  
Store Profiling



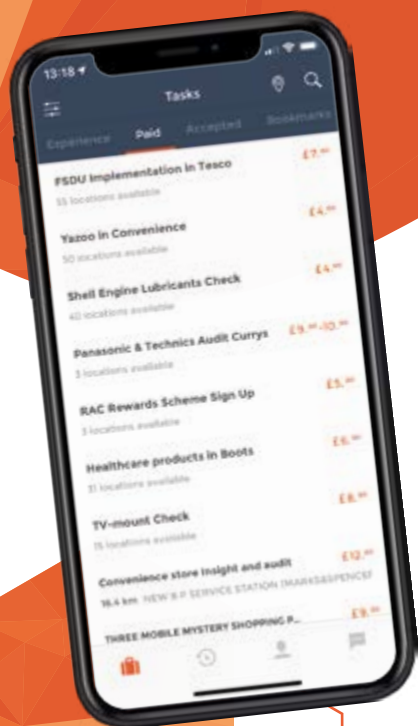
## MYSTERY SHOPPING

Brand Standard Visits  
↓  
Voice of the Consumer  
↓  
Promotional Compliance  
↓  
Regulatory Compliance



## ONLINE / DIGITAL EXECUTION

Improve Site Rankings (SEO)  
↓  
Product Testing  
↓  
Ratings & Reviews  
↓  
Consumer Insights



## MAXIMISE EFFICIENCY

## AND ROI

- Get your results up to 70% faster
- Pay only for approved completes
- 100% reviewed data and photos in real-time
- Cover multiple areas simultaneously





# SPORTS & OUTDOOR RETAIL

## SHOPPER INVESTIGATION



In our Shopper Investigation, we explore the ways in which sports and outdoor retailers use display to attract customers and drive purchases.

### The sports and outdoor scene

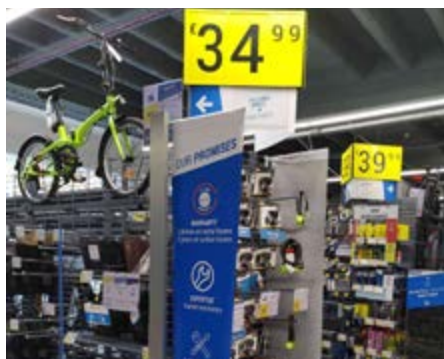
As with many areas of the retail industry, the sports and outdoor category was hit hard by the COVID-19 lockdowns. As the retail world re-emerges, retailers need to find new ways to attract shoppers in store, seeking to lure them away from the convenience of online shopping through innovative and creative in-store experiences.

### Our research

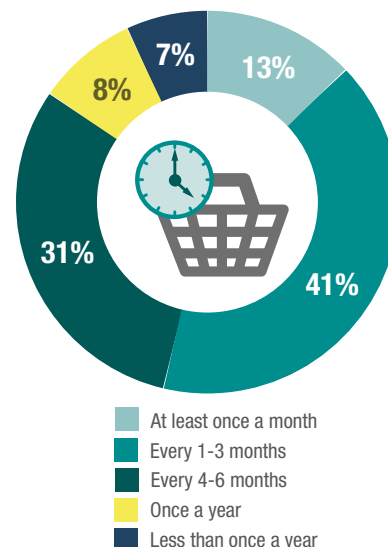
We asked 100 shoppers to visit a selection of retail stores and to record what sort of promotional messaging and display equipment they saw, where they saw it and how impactful it was. We also asked them about their decision-making processes and shopping habits.

### Shopping regimes

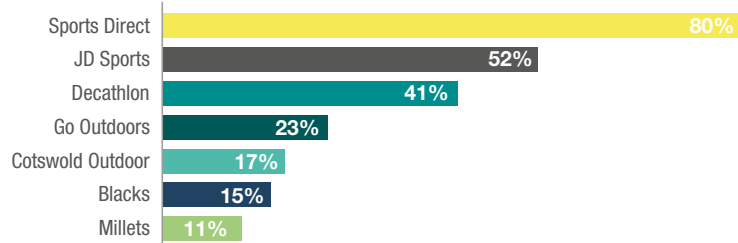
When we asked our shoppers where they had made purchases in the last 12 months, sports and fitness retailers were the clear front-runners. A significant 13% of shoppers splashed the cash as often as once a month. Only 15 out of our 100 shoppers shopped once a year or less for sports and outdoor products.



How often do you shop for sports or outdoor products?



Which of the following stores have you visited in the past 12 months?



Source: POPAI/Roamlar

Source: POPAI/Roamlar

# Future success depends on what you're made of



In these very uncertain times it is essential to know that your in-store promotional activities are in the safest hands possible.

Display is not just a standalone POS company, we are part of the Smurfit Kappa Group which operates a global circular economy, controlling our material supplies from managed forests through to paper recycling in the most sustainable way. This ensures that you will always receive market leading service backed by our global shopper insights and expert creative, design and manufacturing from our production sites in the UK and Republic of Ireland.

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# display

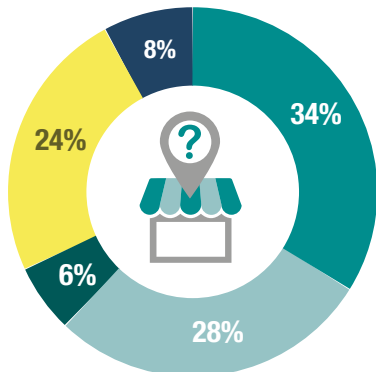
A part of the Smurfit Kappa Group

# SPORTS & OUTDOOR RETAIL

## SHOPPER INVESTIGATION



### Purpose of visiting retailer on last visit



- Knew what I wanted and where to get it
- Wanted to have a look for a particular product
- Was shopping for someone else
- Just having a look around
- Was passing so thought I'd pop in

Source: POPAI/Roamler

### At the store

The most widely reported number of promotional material in windows was between one and three, found at 37 stores.

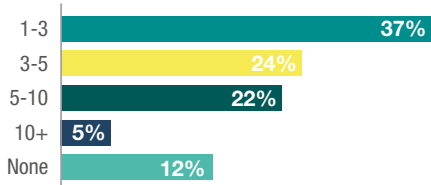
Hero messages proved to be something of a mixed bag. The most frequently seen were those promoting in-store discounts at 31% of stores.

Our shoppers reported that no prominent outdoor branding was found at a surprisingly high 66% of stores.

Moving in store, posters and FSDUs were the most widely found in-store display mechanic, seen at over half of stores visited, while shelf-edge display was found in 42%.

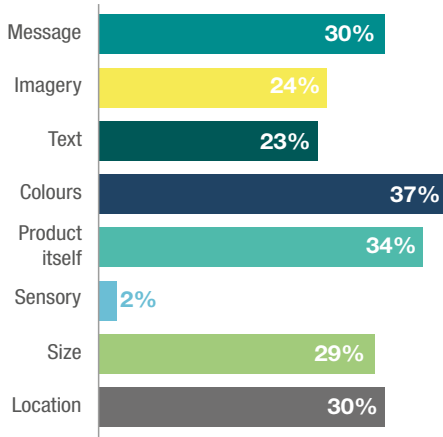
Our shoppers identified that 69% of stores were using secondary displays in store.

### Number of promotional materials in store windows



Source: POPAI/Roamler

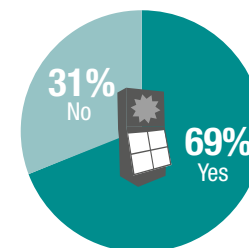
### What made the message stand out?



Source: POPAI/Roamler

Three-quarters of our shoppers told us that the stores they visited had separate category areas for different activities, including gym and fitness, running, camping and football.

The majority of stores were found to have products on display in the checkout area. Clothing was most popular here, found at 20 stores, closely followed by confectionery at 18 stores.



Secondary displays in store

Source: POPAI/Roamler

Our research highlighted some interesting points about sports and outdoor retailers.

Ultimately, our shoppers were not unimpressed with what they saw in store, but neither were they jumping for joy.

### Sources

<sup>1</sup> Statista, Sports & Outdoor Market Forecast 2021

<sup>2</sup> McKinsey & Company, Sporting goods 2021: The next normal for an industry in flux – Jan 2021

<sup>3</sup> Mintel, UK Sports & Outdoor Fashion Market Report 2020

Access our complete report to find out more about sports and outdoor retail.



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Sometimes, less is more.



# CAMPAIGN & EXPERIENTIAL

## DISPLAY BEST PRACTICE



More and more brands are turning to 'experiential' in-store installations and activations. In this Best Practice report, we have delved into the POPAI Awards archive, asking: who offered an unforgettable experience to shoppers?



### A feast for the senses

Offering samples to shoppers is a great way to show you have unshakable faith in your products. Silver winner in 2017, Glenfiddich Luxury Experiential, drew the eyes and noses of passing shoppers with its whisky tastings, also tantalising tastebuds with a food pairing to enhance the taste of the whisky.

Gold winner from 2020, the Heinz Beanz Muzeum, also offered up some culinary delights to celebrate 150 years of the iconic brand. Chefs were on hand at the attraction, cooking up a delicious food tasting experience for visitors at what judges described as 'A truly brilliant execution!'

### New realities

Playing with new and emerging technologies is a great way for brands to bring shoppers to a halt on their mission, drawing them in with the temptation to have some fun. This was exemplified by the 2018 Gold Award winner, the Topshop Splash! campaign.

Shoppers loved it and so did the judges, commenting that it was a 'fantastic use of virtual reality and light to simulate a water flume ride within the store, supported by fragrance to recreate the whole holiday experience'.



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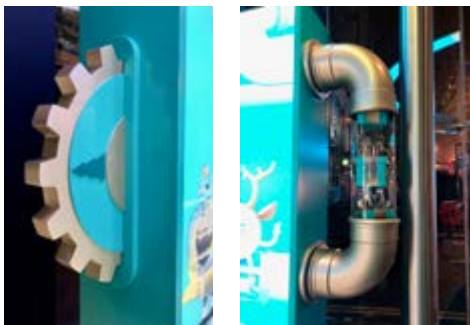
# CAMPAIGN & EXPERIENTIAL

## DISPLAY BEST PRACTICE



### Social status

Social media sharing is a powerful way for brands to increase their reach, and with a growing number of platforms available the opportunities are vast. The Ferrero Rocher: Behind the Layers campaign took the Silver Award in 2018 and was commended by judges, who said: 'This installation took pop-up activity to a new level of impact, premium execution and branding. User-generated social media content created reach far beyond the installation, reaching more than 3.6 million people.'



### Fully immersed

Engaging shoppers is a huge part of an experiential campaign. But immersing them is the pinnacle.

The EE Christmas Showcase 2018 scooped the Silver Award in 2019 with an entry which judges described as 'A very well designed and made unit which catches the eye, is on brand and is engaging, with the game element creating shopper immersion'. The interactive game was designed for shoppers to operate at EE stores, using a steering wheel set on a plinth. The design was backed up by high-end 3D premium products to really catch shoppers' eyes as they entered the store.

### Power of play

Fun and play is a big part of an experiential campaign, lifting shoppers away from their perhaps-mundane original shopping mission. Gold Award 2019 winner the Diet Coke Igloo gave grown-ups the perfect chance to get in touch with their inner child. The Igloo housed a giant ball pit to promote the campaign 'Put Perfect on Ice', along with a seating area and sampling bar.

Looking back has been a great experience. Now, we can look forward to seeing what the 2021 Awards will bring.

Access our complete report to find out more about our Award winners.



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# SHELF EDGE

## STOREDITS



In this report, we look at which types of display mechanics are used on the shelf edge, and explore any differences between those which are retailer-only and those which are co-branded.

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

The shelf edge is at the heart of the action in store. Because of its critical role in the shopper journey, there is a wide range of displays and mechanisms which can be deployed at this point of the store.

### Our research

We visited 38 stores across 19 retail chains during August 2021. We looked at the display mechanics being used at the shelf edge, exploring the differences between retailer-exclusive display and co-branded display.



### Shelf-edge display

Starting off with fins and bus stops, both of these devices are great for conveying concise, eye-catching messages at the shelf edge. So, unsurprisingly, we found them being used by most of our retailers. We noticed that 89% were exclusively retailer, 68% co-branded with retailer and brand, and 42% were brand only.



Moving on to wobblers: as the name suggests, wobblers wave around, easily commanding the attention of shoppers. We found exclusively retailer wobblers in 32% of the stores and co-branded and sole branded in just 5% of stores. However, we found no wobblers at all in 63% of the stores visited.

Shelf barkers are little tickets which 'talk' to shoppers, often acting as a mini guide to products or conveying price or discount information. Barkers were big amongst our retailers, used in some capacity by all bar one.

Shelf strips are simple but extremely powerful. Again, the vast majority, 95%, of our retailers used retailer-exclusive shelf strips, but just 5% used co-branded and 26% used brand only.



# The Perfect Collaboration



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- Artwork Creation
- Retailer Approvals
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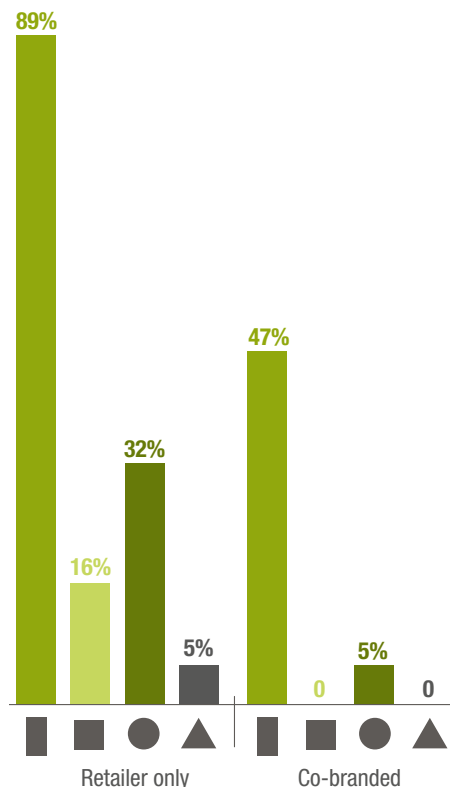
#TogetherWeAchieveMore



# SHELF EDGE STOREDITS



What shape are the barkers?



Source: POPAI Storedits

What type of shelf strips are being used?



Source: POPAI Storedits



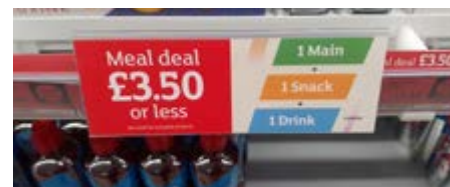
## Other mechanics

Pushers are a great shelf-edge mechanic, so we were not too surprised to see them used in 68% of the stores we visited.

Gravity feed display was used by 37% of our retailers, across a range of categories. Shelf trays were also found at 37% of the stores we visited.

Meanwhile, parasite units were found in 79% of our stores.

Our research revealed that most retailers are keenly aware of the power of the shelf edge, and we found a vast array of different display mechanics which were retailer-exclusive, co-branded or brand only.



## Shelf Spotlight



Access our complete report to find out more our shelf-edge findings.



Read the **FULL REPORT**

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# POPAI Sustainability Services



## Recognising the global focus on sustainability

As an industry body, POPAI is committed to raising standards and has developed **four key products**, available to all sectors to establish a single, recognised standard to support, operate by and measure sustainability achievements.

### POPAI's Sustainability Vision

POPAI UK & Ireland is committed to reducing the industry's impact on the environment. We recognise that the most effective approach to improving the sustainable performance of retail marketing is to work collaboratively throughout the supply chain.

We are committed to achieving this within the POPAI Sustainability Partnership, working with all parties in the value chain to achieve real and measurable reductions in our environmental impact.



#### POPAI Sustainability Standard – Supplier

Developed in direct response to calls from the industry for a standardised approach, the **POPAI Sustainability Standard (PSS)** embeds sustainability principles within organisations and challenges traditional practices by helping industry professionals better understand how, where and when sustainability issues translate to their business.



#### POPAI Sustainability Partnership – Brands & Retailers

This is specifically created to help brands and retailers reduce the environmental impact of all materials in store and to reinforce their sustainable credentials. It will include making commitments to the sustainability of your in-store activities and aligning your supply chain to fully reflect your values.



#### Sustain® the eco-design tool

Sustain® measures the environmental impact from the production of display and sales promotion items of all types. It includes supply chain, transport, componentry, processes, energy use and end of life.

**Recommended by major brands and retailers.**



#### POPAI Sustainability Consultancy

Recognising the need for support across the industry, POPAI now provides a range of consultancy services in sustainability, including sustainability audits in store, sustainable design criteria, metrics and analysis of environmental performance, plus advice on procedures and practices, for both clients and suppliers.



# PHYGITAL PLAYGROUNDS

## GLOBAL TRENDS



In this *Phygital Playgrounds* report, we explore a new evolution of omnichannel retail where brands and retailers are using their physical stores as a value-added extension of their digital experience.



### Zara Store Mode

Fashion brand Zara has rolled out Store Mode across its physical store estate in the UK, allowing customers to 'browse' physical stores online. The Store Mode feature on the brand's app switches the inventory available from Zara's main e-commerce offering to the real-time inventory at the user's nearest physical Zara store. The website will then display only products and sizes which are available at that moment. Any purchases made online will be ready to pick up within 30 minutes.

Zara has effectively turned the store into a changing room for its e-commerce site.



### Amazon Salon

The tech-packed Amazon Salon in London's Spitalfields leverages proprietary point-and-learn point-of-sale technology to double as a showroom for the brand's famous e-commerce site. When standing in front of a selection of products, customers simply

need to point at an item to bring up additional information and relevant brand videos on a screen above the display. All items also have QR codes displayed alongside them, allowing customers to find out more information on their own devices and giving them a seamless way to add them to their online Amazon baskets.



# LEADING-BRANDS- FOR-RETAIL.COM



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Design: Andreas Hegert



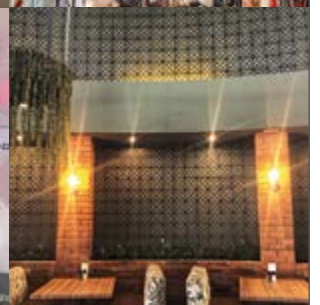
Fotograf: Rousseau Designs



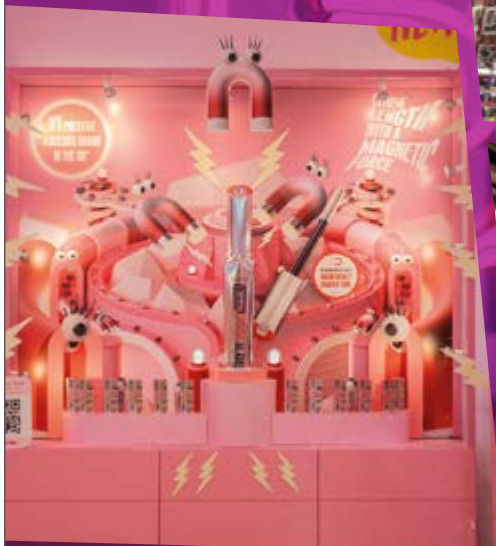
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# PHYGITAL PLAYGROUNDS

## GLOBAL TRENDS



### Bed Bath & Beyond New York

Bed Bath & Beyond has revamped its New York flagship location around what it is calling an 'omni-always shopping experience'.

The homewares retailer's stores are traditionally made up of ceiling-high displays stacked full of every available SKU. In the 6th Avenue store, these have been swapped for lower shelves carrying heavily curated product ranges, which opens up sightlines across the store and allows light to move throughout the space.

This helps to create a more inspirational sales floor built around hero products, while customers are encouraged to scan QR codes to find out more information and shop a wider range of products on the Bed Bath & Beyond mobile app.

All purchases made via the app are available for same day delivery in Manhattan, or for curbside pick up within an hour.



What we are seeing across all of the examples in this trend report is a real maturation of the omnichannel customer journey, where the digital and physical channels serve different purposes but work together to offer an experience that is more, rather than less, than the sum of its parts.

Access our complete report to find out more examples of phygital playgrounds.



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](mailto:john@gdruk.com) Follow GDR Creative Intelligence [@gdruk](https://twitter.com/gdruk) on Twitter and sign up to the weekly newsletter.



**Sustain**<sup>®</sup>  
The eco-design indicator tool

## Measuring the **environmental impact** of your displays

Sustain<sup>®</sup> is an indicator tool that works to Life Cycle Assessment (LCA) principles. It measures the environmental impact of the supply chain, materials and processes, and end of life. It is recommended by leading brands and retailers. The annual fee covers unlimited users and unlimited projects, on a per-country basis.

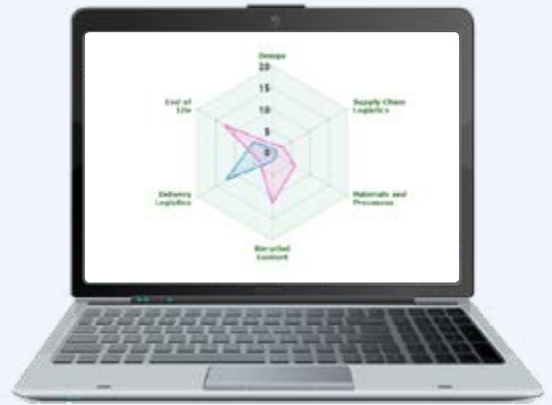
The Sustain<sup>®</sup> tool will score your P-O-P based on:

**Design | Supply chain logistics | Materials, processes & packaging  
Delivery logistics | Recycled content | End of life**

The Sustain<sup>®</sup> tool delivers a range of metrics, measuring CO<sub>2</sub>e, water, recycled material content, end of life and component recyclability.

### How to use the results

Once you have your outputs, the Sustain<sup>®</sup> tool includes recommendations for improvement in your environmental impact. The outputs can be exported for your own analysis and collation.



*An example of Sustain<sup>®</sup> tool rendered results*

For more information please contact: Martin Kingdon | ☎ +44 (0)1455 613651  
✉ [sustainability@popai.co.uk](mailto:sustainability@popai.co.uk) 🌐 [www.popai.co.uk/sustainability](http://www.popai.co.uk/sustainability)

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