NON-MEMBER EDITION

ISSUE 49 | 2022

POPAI
PART OF THE shop! GLOBAL NETWORK

IN-STORE INSIGHTS

RESEARCH REPORTS

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Welcome to *In-Store Insights*.

I always enjoy the wide range of insights and revelations our reports bring. Sometimes our research serves to emphasise what we already know. Sometimes it brings surprises or even shocks. But what it always does is bring clarity. Real-world data which shows us what shoppers want, what they see in store, what drives them to purchase. Compiling this issue has really brought home to me the value of these insights to all areas of our industry.

Any member in the supply chain will find huge value in the vast array of assets they can access through POPAI. From a contemporary or retrospective scan of the in-store environment, to a deeper understanding of best practice via competitor or complementary brands' case studies from our Awards. From attending a variety of events and hearing directly from the horse's mouth, to accessing information and data in our back catalogue of presentations and research reports.

This rich, up-to-the-minute stream of relevant, useful and independent information will only serve to strengthen client-supplier relationships and ultimately enhance the total shopper experience.

It's always wise to look beyond your category for best practice. We all have the same issues in store. So let's learn from others' experiences...

In this issue, we immerse ourselves in the world of health, wellbeing and fitness products. What shape is the industry in? Find out more in our Shopper Investigation on **page 5**.

Are recycling logos a sign of our times? With an influx of sustainability symbols, we explore whether they are bringing clarity or confusion to shoppers. In our second Shopper Investigation on **page 9** we ask: which logos are leaving their mark?

It's always a pleasure to produce one of our Display Best Practice reports, as it gives us the opportunity to remind ourselves of the brilliant Award-winning entries over the years. In this issue we focus on Short Run - Permanent Display, a creative category that's always a lot of fun. Our deep dive into the winning entries on **page 13** asks: in short, who shone?

Finally, in our Global Trends report on **page 17**, we look at the new world of multi-mission magnetism. As the nature of retail continues to change, retailers are redefining the meaning of hybrid retail, through clever use of innovation and technology. It's fascinating stuff.

Enjoy the issue.

Phil Day, POPAI

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.

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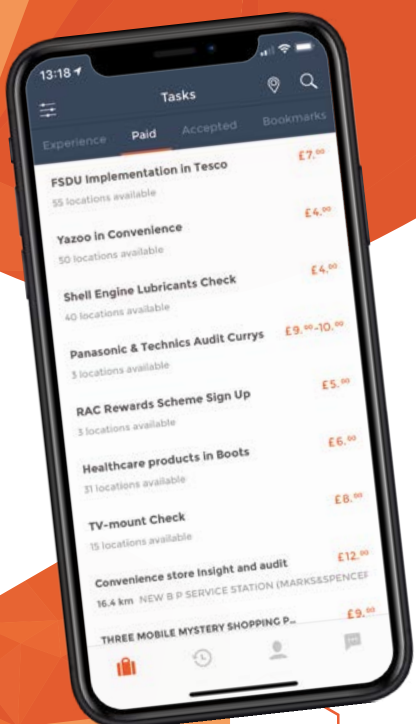

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HEALTH, WELLBEING & FITNESS

SHOPPER INVESTIGATION

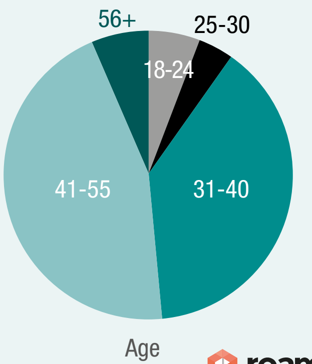
As many people are now placing a renewed focus on their health and wellbeing, we conducted our own research to see how related products are promoted in store, asking: what shape is the industry in?

More than a quarter of UK residents say they feel less healthy than they did pre-pandemic, and 28% of adults in England are classed as obese. However, it seems that we are determined to change our ways. An England-wide survey of over 5,000 adults found that 80% of people aged over 18 made the decision to change their lifestyle in 2021, by losing weight, quitting smoking or reducing their alcohol intake.

In terms of supplements and self medication, it seems we are driving a growing industry. Sales of over-the-counter vitamins and minerals amounted to over £431.5m in 2019, increasing to £495.2m in 2020, while over-the-counter drugs accounted for £2.63bn in 2020.

Our research

We asked 100 shoppers to visit a selection of Tesco, Asda, Morrisons, Sainsbury's, Marks & Spencer, Waitrose and Co-op stores to record promotional messaging and display equipment. We also asked them about their usual shopping habits.



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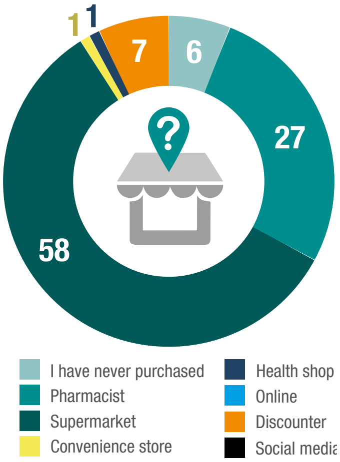
Cold comforts

Of our shoppers that would seek advice for colds and flu, 37 said this would be at a pharmacy. When it came to their purchases, the supermarket came out on top, chosen by 58% of our shoppers, while 27% opted for specialist pharmacies.

Well and good

Our shoppers were pretty confident in their own choices when purchasing wellbeing products, with 38% saying they have never needed to seek advice on what to purchase. For those who did need more guidance, most looked online for advice.

Where do you usually purchase cold and flu remedies *(such as cough mixtures and decongestants)*?



Source: POPAI/Roamler

Where do you usually purchase wellbeing related products *(such as vitamins, antioxidants and protein supplements)*?

Source: POPAI/Roamler

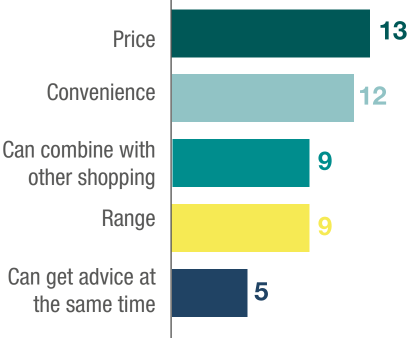
HEALTH, WELLBEING & FITNESS

SHOPPER INVESTIGATION

A weighty issue

Weight-loss products were decidedly unpopular with our shoppers, with 69% telling us they had never purchased these products before. For those that had, the supermarket was once again their chosen place to purchase, followed by the pharmacy, a health shop, convenience store or via social media.

Why do you usually purchase weight-loss related products from this source *(such as vitamins, antioxidants and protein supplements)*?



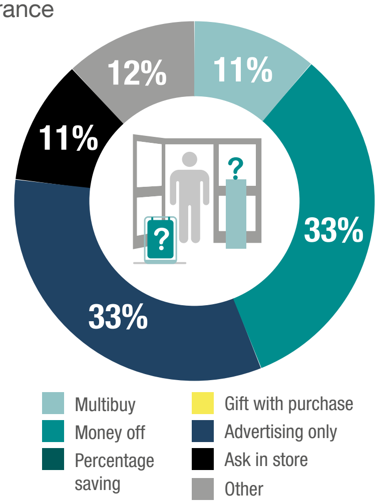
Source: POPAI/Roamler

AT THE STORE

Most of our shoppers found no promotional display outside the store. Promotion of health, wellbeing and fitness products also seemed very limited on entry to the store, with 91% of shoppers finding no displays promoting them at all.

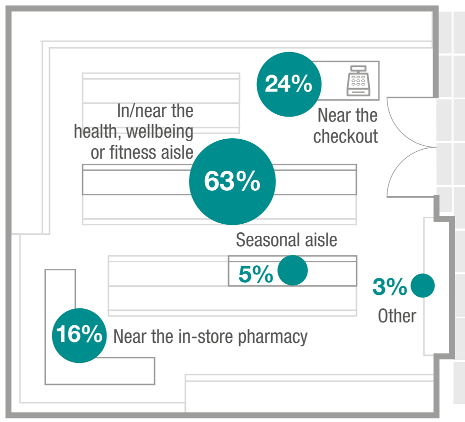
Although products were promoted more widely inside the store, our shoppers still found no promotional displays in 62% of stores visited. Shelf fins, wobblers and free-standing displays were the most frequently noticed, followed by gondola ends and shelf signs. Unsurprisingly, the most common place that our shoppers reported seeing promotional displays was in the health, wellbeing or fitness aisle.

How products are promoted at the store entrance



Source: POPAI/Roamler

Where promotional displays are located around the store



Source: POPAI/Roamler

Finding fitness

Almost three-quarters of our shoppers reported that the stores visited had no navigational signage to health, wellbeing or fitness related products. However, this did not seem to stop them from locating these products in store, as only 19% reported that they found it either 'difficult' or 'very difficult' to navigate their way to the products.

While there is clearly an appetite for health, fitness and wellbeing products from shoppers, retailers are not cashing in on this trend. Our shoppers found very little in the way of promotional displays outside the store or on entrance, and while more were found throughout the store, these were still not particularly prevalent.

Sources

Statista
Gov.uk
Office for National Statistics

Access our complete report to discover our full findings.

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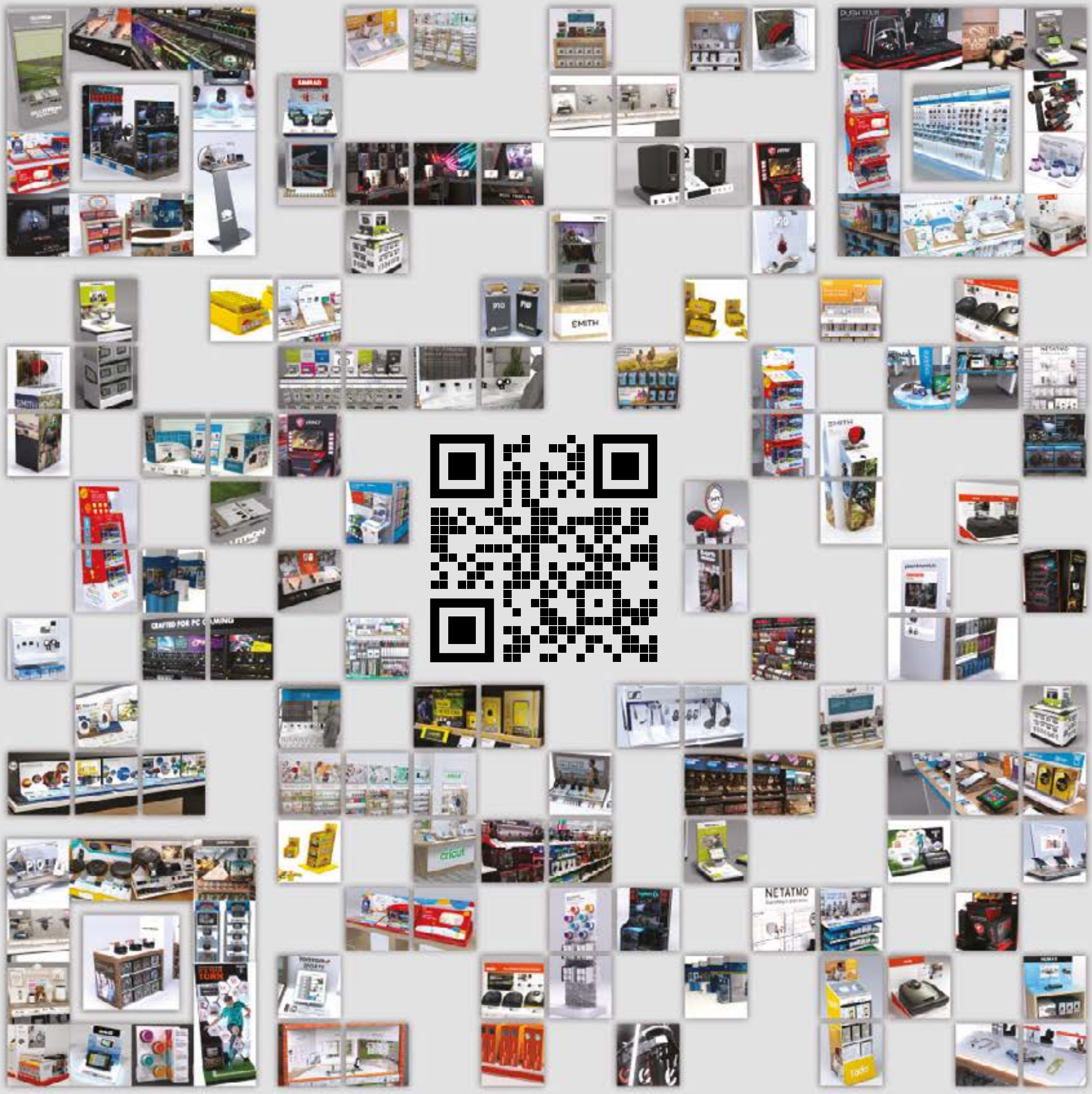

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RECYCLING LOGOS RESEARCH REPORT

SHOPPER INVESTIGATION

We are seeing an emergence of labels and logos to encourage recycling and other eco-friendly activities, or to offer information about the green credentials of a product or its packaging. POPAI conducted extensive research into the use, clarity and purpose of these symbols, asking: which logos are leaving their mark?

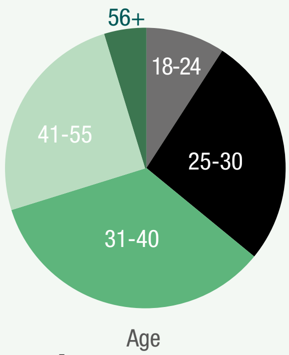
Signs of the times

Sustainability and recycling symbols now appear on all kinds of everyday items, especially packaging. But although they are much more prevalent, they are nothing new. In fact, the famous Möbius Loop dates back to the 1970s, ahead of the first-ever Earth Day.[1]

As well as a range of recycling logos, there are a now a number of other sustainability-related symbols, such as FSC (Forest Stewardship Council), Fairtrade and Rainforest Alliance.

In fact, today there are 455 ecolabels being used in 199 countries around the world, covering 25 different industry sectors.[2] In the light of such important progress and change, POPAI decided to investigate the impact of these ecolabels on UK and Irish shoppers.

Our shoppers



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Familiar territory?

We asked our shoppers to review ten commonly occurring logos and tell us if they recognised them.

There was only one logo all of our shoppers recalled seeing, which was Tidyman. The Möbius Loop and Recycle logos were not far behind, recalled by 97% and 96% of shoppers respectively. However, TerraCycle and Compostable logos were far less familiar to our shoppers, recalled by only 23% and 16% of respondents.

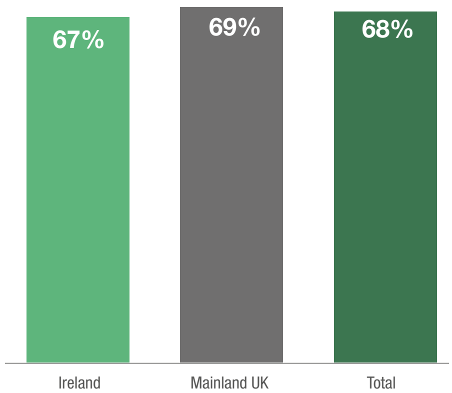
Interestingly, fewer respondents recalled seeing the logos than said they understood what they represented. On average, only half of our shoppers said they thought they understood the logos' meaning.

Of all the logos, the generic Recycle logo was most commonly understood, with 82% of all respondents knowing its actual meaning.

Our research

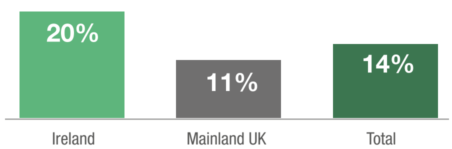
We asked 100 shoppers from the mainland UK and a further 50 from Northern Ireland and the Republic of Ireland to support our research. We also spoke to brands, retailers and display manufacturers.

Average percentage of respondents who recall seeing logos



Source: POPAI/Roamler

Percentage of respondents who said that logos influence their purchasing decisions



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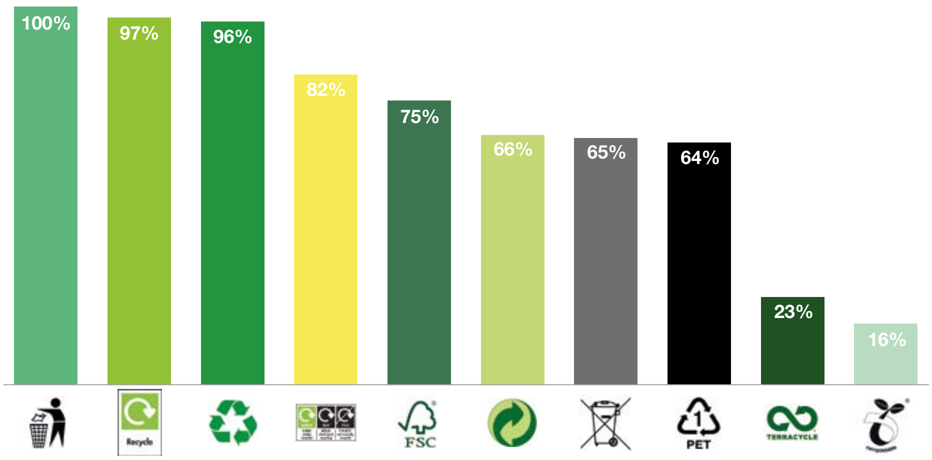
Shoppers' opinions

At least 70% of our shoppers said they find recycling logos confusing. This could go some way to explaining the fact that very few said that logos on products affected their purchasing choices.

We asked our respondents to rate the importance of recycling, with 1 being low and 10 high. Across both regions, the result was very high, both higher than 8. This was fairly well reflected in our shoppers' recycling habits. On average, respondents recycle 69% of all household products that can be collected by kerbside recycling schemes or are accepted at local recycling centres.

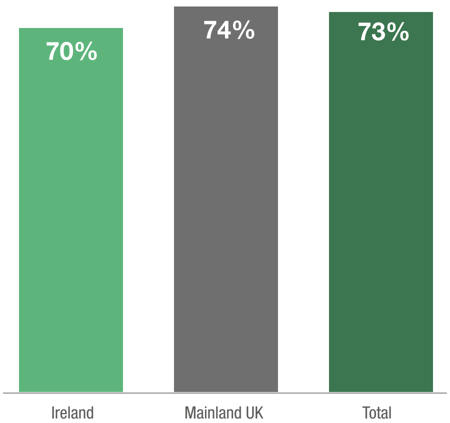
When asked what respondents thought could be done to make recycling easier, the most popular responses included more information about recycling and explanation of logos, along with their standardisation.

Logos most commonly recalled



Source: POPAI/Roamler

Percentage of respondents who say they find logos confusing



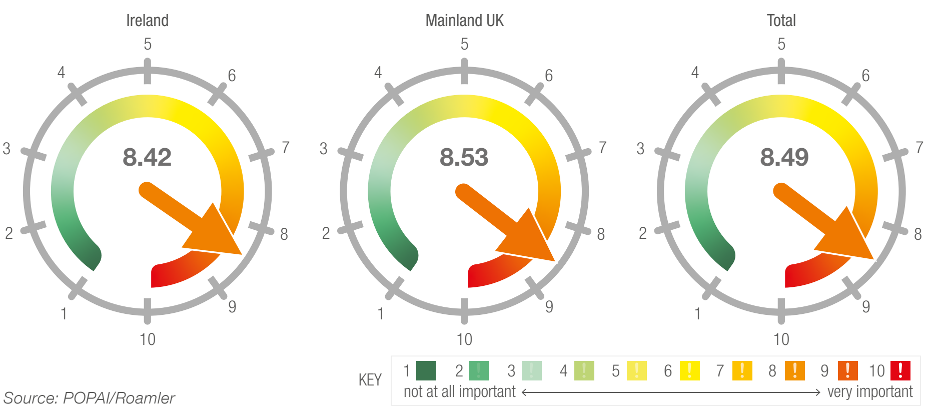
Source: POPAI/Roamler

P-O-P displays

We spoke to 192 brands, retailers and P-O-P display manufacturers. Of these, just over half said they had printed logos on a display in a location where shoppers would be able to see them, while 42% said they had not. From the brands interviewed, 58% said that they had asked their suppliers to print a sustainability or recycling logo on a display so it was visible to shoppers. It was a similar story from retailers, with 56% doing the same.

While these logos may be fairly prevalent, the fact that only half our respondents thought they understood what they meant is food for thought for retailers and brands. Indeed, sustainability logos are there for a reason. Not just as a status symbol.

How important is recycling?



Source: POPAI/Roamler

Sources

[1] *BusinessWaste.co.uk*
[2] *Ecolabel Index*

Access our complete report to discover our full findings.

Read the **FULL REPORT**

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SHORT RUN – PERMANENT DISPLAY

DISPLAY BEST PRACTICE

For this Best Practice report, we explored the POPAI Awards archive to find out more about our winners from the past five years in the Short Run – Permanent Display category, asking: in short, who shone?

Our POPAI Awards feature two categories for Short Run: Permanent and Temporary. Our focus here is on the Permanent category, which defines entries as being 'Displays whose planned rollout was a run of less than 50 units. Permanent display relating to any retail sector. Must not be a trial or component part of a larger display project.'

Environmental awareness

Short-run displays often have to serve a specific purpose for a particular in-store environment. In the case of 2017's Gold winner, the Garmin Arnotts Playtable, this was to not only deliver a standout brand and product experience in a flagship retailer, but also offer strong category management in a small footprint area.

Similarly, Gold winner from 2020, Ronseal Ultimate Decking Stain Aisle, took a functional category and made highly effective use of a small space to create an eye-catching and inspirational design which delivered a raft of key messages.

Delightful disruption

The element of surprise can disrupt shoppers from their original mission. The Silver winner in 2017, the Boompods Aquapod unit, was a great exemplar of this. To demonstrate the waterproof nature of the product, the manufacturer installed a shower which continually sprayed the product with water as it played, honing in on its USP.

Scooping Silver in 2021, the Casio Wall Bay also challenged traditional thinking. Showcasing three hero products designed in collaboration with the MOD, which represented air, land and sea, the sealed displays used mud, kinetic motion, dust and water to simulate the different terrains in which the watches can be used.

SHORT RUN – PERMANENT DISPLAY
DISPLAY BEST PRACTICE

Demonstrative behaviour

Increasingly, brands and retailers are encouraging engagement and interaction from shoppers, with displays serving not just as a product showcase but as a place of trial and demonstration. The Silver winner from 2018, Alexa Future Home Concept, was a ‘super table’ placed in John Lewis stores. It aimed to deliver multiple messages to shoppers, including how fun Alexa was, the ‘wow’ effect of using it, and how simple it is to control smart home devices.

Joint Silver winner Game Interactive Category Management was six metres of interactive merchandising fixtures spilt over the categories of PC hardware and PC accessories. It was offering the ultimate try-before-you-buy experience to shoppers.

Beautiful branding

Branding is a big part of every display, but some entries went above and beyond in their quest to capture the attention of fickle shoppers. In 2019, the joint Silver Award went to the Revolution Hero Display, which was designed to showcase the elevated brand proposition of Revolution Beauty within Superdrug.

Another installation for Superdrug also won accolades for its clever brand showcasing. The Sanctuary Spa – Superdrug Island won the joint Bronze Award in 2021. Bringing to life the ‘at-home-spa-luxury’ feel of the brand, it was a 360-degree display, shoppable from all sides and immersing the shopper fully in the brand when they were at the fixture.

Delving into our POPAI Award archives is always a pleasure, reminding us of the superlative calibre of entries and creativity, innovation and flair shown by our ultimate winners.

Access our complete report to find out more about all our Award winners in this category, and read the judges’ comments.

Read the **FULL REPORT**

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MULTI-MISSION MAGNETISM

GLOBAL TRENDS

At GDR we have long been fans of hybrid retail locations that offer consumers unique experiences by mashing together offers or services from different brands or sectors.

In this Multi-Mission Magnetism trend report, we highlight the power of hybrid retail in the omnichannel era, but also shine a light on new ways the tactic is being used to give consumers more choice over how they shop a physical or digital space.

CU x Hana Bank

CU x Hana Bank is a co-branded hybrid space in Seoul that merges the capabilities of a convenience store and a bank. Created by a partnership between Korean convenience store giant CU and financial company Hana Bank, the location is a strong indicator of a potential future use case for the beleaguered physical banking sector. The idea behind the space is that customers can take care of their daily grocery missions as well as their banking needs in one trip. CU x Hana Bank is open 24 hours a day and is said to offer 50 different banking services from ATMs and account opening to video consultations with Hana Bank staff in remote locations.

MULTI-MISSION MAGNETISM

GLOBAL TRENDS

Blue Bottle Osaka

American chain Blue Bottle Coffee's first permanent store in Osaka, Japan, includes a unique and immersive customer experience that revolutionises the act of drinking a coffee.

While the ground floor of the two-storey location operates like a traditional coffee shop, the second floor includes a unique sensory experience that aims to de-stress patrons and "stimulate the five senses" as they drink their coffee.

The experience takes place in the centre of the top floor, within an area enclosed by frosted glass. The ceiling of the space is dominated by a digital screen that projects different images, colours and sounds into the area. The seating around the outer edge of the cubicle also vibrates subtly to further stimulate visitors. The unique space was created by Japanese digital design and modern architecture firm Panoramatiks, which describes it as a "sensory experience where music and images 'fall' from the ceiling".

Livat Changsha

IKEA-owned mall developer Ingka Centres, which operates as Livat in China, has reduced the amount of retail in its latest mall development in favour of a stronger focus on residential developments, co-living and co-working spaces. Livat Changsha, which the company refers to as a "meeting place" rather than a mall, is Livat's first mixed-use retail and residential space and is roughly split in equal thirds between retail, entertainment spaces and housing.

There are 500 apartments in the complex available to buy, each of which includes access to co-working and co-living spaces. Interestingly, all of the apartments and shared living spaces are designed and decorated by IKEA, effectively offering consumers the opportunity to live in an IKEA-branded community.

Access our complete report to find out more.

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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**