

in-store insights

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Shoppers and industry experts review what the last festive period had in store.



Growing investment in innovation is sure to reap some fascinating disruption in 2016.



Grocery shoppers continue to quell their impulsivity as spending becomes more considered.



The 'luxé' trend continues to influence the development of mainstream retail displays.



Our stoic desire to soldier on regardless of health warning signs perhaps typifies something else that is all too common.

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EDITOR'S WELCOME:

Every year starts off with good intentions – a fresh manifesto to create a new you with the invariable health kick. So, how's it going? In truth, we all know that life and, more specifically, the day job will often have to take priority. It's why we'd like you to think of this issue of In-Store Insights as a bit of a 'health' special, designed to give you a helping hand in your quest to get your retail campaigns in the best possible physical condition.

There is a review of the fast-growing healthy snacks category in our latest Sector Report (page 5), along with a large dose of insight into changing shopper attitudes within grocery retail (page 7) that we hope will peak your interest. We also check up on shopper attitudes to retail activity during the 2015 festive period – identifying possible ailments that may need addressing before planning starts for what's in store come Christmas (page 9). Finally, we have our regular injection of the latest trends taking the world by storm, from our friends at GDR Creative Intelligence (page 11), including an imaginative Japanese point-of-purchase campaign from Dentapple.

As ever, we aim to bring you fundamental and practical insights and research from POPAI and a wealth of other industry sources, as well as sharing recommended best practice and industry case studies to help improve knowledge and skills, inform discussions, presentations and projects, and underpin our relentless pursuit of point-of-purchase excellence.

Happy reading!

Marc Baker
Editor



Membership

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A cold can slow down the best of us. But our stoic desire to soldier on regardless perhaps typifies something else that is all too common. After all, listening to what we are being told and taking action, before it's too late, is nothing to be sniffed at.

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HEALTHY SNACKS

A clampdown on sugar consumption and obesity has seen a drive by supermarkets to stock healthier snacks, and a number of new brands taking over in-store locations once dominated by confectionery brands.

The UK has long been a nation of snackers – research shows that we eat our way through approximately 9.1bn packs of crisps, nuts and snacks each year¹. But recently healthy snack sales have been booming. The trend signifies the increasingly important role that snacking is having within shoppers' lives – with flexibility of working days and routines resulting in a move away from set mealtimes.

While the best-selling snack category, crisps, has traditionally enjoyed strong sales by linking in with retailers' ever-popular 'meal deal' promotions. However, as consumption habits continue to change, are we starting to see a shift away from the belief that what we should eat for lunch is a sandwich, pack of crisps and drink?

At the checkout

Many grocery retailers have now stopped selling sweets and chocolates at checkouts in an effort to help shoppers make healthier choices. And not surprisingly, healthy snacks are becoming the natural replacement to



occupy the location once dominated by the leading confectionery brands. Amy King, Sainsbury's impulse category planner, said that healthy snack products being promoted at checkout tills, 'fits really well into (the growing) trend by bringing a tasty and more permissible snacking offer to our customers'².



Brands such as Graze are now moving in to claim this prime point-of-purchase positioning – a fact which is undoubtedly contributing to it fast growing to become a national, with strong and positive awareness of the brand amongst shoppers. The brand's products can now be found near tills within Tesco Express formats, to name just one, with discount retailer Aldi also using the checkout area to promote its own range of healthy snacks, bars and nuts. Other healthy snack brands are also enjoying success. Urban Fresh Foods, the company whose products include fruit Yoyos and Bear Nibbles has seen sales really take off in the food market with turnover predicted to hit £27m in 2016, up from just £7m in 2012. Its products are now sold in 18,000 outlets including Sainsbury's and Tesco.

Impulse opportunities

According to a 2015 report by Mintel³, communicating product innovation at the point-of-purchase could have a strong influence on impulse buys of snacks, with a new flavour or new product from a favourite brand noted by more than a quarter of impulse snack buyers as having prompted them.

As a brand that started its life online, Graze has found itself in the unusual position of having 'half a billion pieces of customer preference data' across its range of 1,000 products. This allowed it to carefully select the most appealing offering for its retail range – in many ways rethinking the definition of 'impulse'. A test run in retailer Boots suggested the pre-planning would pay off, with Boots Advantage Card data showing that nearly '50 per cent of purchases were made by consumers who hadn't bought into the Boots snacking category in the past five months', according to Graze retail director, Emma Heal⁴.

Cross-category impact

Whilst sampling has always been an effective tool for engaging shoppers within the grocery aisle, recent research has shown that doing so within healthy snacks, or other health product categories, could have a positive impact in other areas of the store. Cornell researchers have found that a healthy mind makes you buy healthily. In other words, grocery retailers can encourage people to buy more products by offering samples of fruits and vegetables at the store entrance. The study found that shoppers who ate a small healthy snack before shopping healthier foods. Their research published in Psychology & Marketing found that shoppers who ate an apple sample before shopping bought 28% more fruit and vegetables than those who did not eat the sample⁴. According to Aner Tal, PhD, one of the Cornell researchers involved in the study, this shows that 'having a small healthy snack before shopping can put us in a healthier mindset and steer us towards making better food choices'.

Sources:

¹ Nielsen, 2014

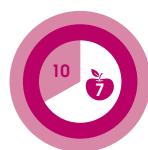
² Real Business Magazine, 13 July 2015

³ Mintel, Consumer Snacking - UK, March 2015

⁴ Cornell Food and Brand Lab, 2015

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38%

Rise since 2009 in shoppers claiming to spend at least £7 in every £10 on healthy products

Source: Dunnhumby



£500m

UK sales of 'free-from' products

Source: Nielsen

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Grocery shoppers

Discounters and digital opportunities may be driving some of the changes in the UK retail landscape, but attitudes towards shopping in grocery retail are also changing as shoppers become increasingly savvy.



Latest research suggests that we are witnessing a new post-recessionary trend in which many shoppers quell their impulsivity and take an even more considered approach to their spending. 'Their expectations of grocery retailers include great quality and service, not just low pricing,' according to Danielle Pinnington, managing director of leading independent shopper research agency, Shoppercentric. 'By truly understanding shoppers' shifting dynamics, smart retailers and brands can start different conversations that potentially stand out from the competitive crowd and resonate with a more thoughtful shopper mindset. It's time to listen.'

Rise in transient shopping

On average, UK shoppers now visit four different retailers a month across an average of two channels for their grocery shopping. Some of this is down to hectic lifestyles (23%), and some of it is down to preference. According to the research, 28% of shoppers shop in specific shops for specific items, whilst 71% of shoppers say they go to the discounters because they considered them to be the cheapest. Their fresh and unusual foods are also pulling in shoppers.

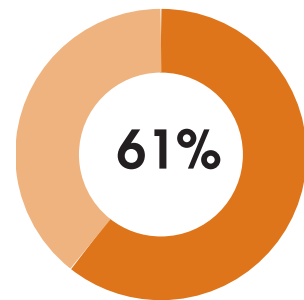
Changing promotional strategies

Shopper attitudes towards promotions in-store have evolved in recent years, forcing the big four retailers to review their promotional strategies. Two years ago, the proportion of sales on promotion stood at 45% among the big four. By contrast, the figure at Aldi was just 3%. The threat from discounters such as Aldi and Lidl

saw Tesco switch to its 'Prices down and staying down' promise, Asda to launch its 'Price lock', and Morrisons to introduce its 'I'm Cheaper – everyday low prices' in a move to give shoppers lower everyday prices with greater transparency. Over half (54%) of shoppers now say they prefer every day low pricing rather than the high-low strategy often employed by grocery retailers in the past. However, 41% of shoppers say they still collect and use vouchers from magazines or flyers that come through the door.

Clearly good value

Perhaps more tellingly, almost half (47%) of shoppers say they shop at discounters because they instinctively know they're getting good value, without having to work out promotions. Indeed, misleading promotions scored an average of 8 out of a possible 10 'annoyance' points amongst grocery shoppers surveyed, with 'out of stock' promotions scoring 7 'annoyance' points out of 10. This is not news to retailers. Back in 2014, when Sainsbury's announced its switch to a mid-low pricing strategy, its marketing director Sarah Warby told *The Grocer*: 'Customers tell us they find supermarket prices and promotions confusing and don't always know who to trust when it comes to getting good value.' Allan Leighton, the former chief executive of Asda, also once talked dismissively of the 'fog of promotions' whilst Reckitt Benckiser UK marketing director, has previously called on retailers to try and find ways to 'de-escalate' the volume of price promotions, after claiming previous 'mad' levels have reduced the effectiveness of wider marketing campaigns.



of shoppers want their spend in-store to benefit British businesses

Shoppercentric is a leading shopper research agency, which provides retailers and brands with intelligence and insights around shopper behaviour and retail trends. Its 'Shopper Stock Take' research index – reviewing UK shoppers' thoughts and feelings about the grocery retail sector – is set to become an annual benchmark.

To find out more, visit:
www.shoppercentric.co.uk
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SPECIALISTS IN ALL TYPES OF POP

CHRISTMAS 2015 IN-STORE

According to Ipsos Retail Performance, high street visits fell 1.8% year-on-year in the week before Christmas. In the run-up to this important trading period, In-Store Insights tracked festive in-store activity from a shopper perspective – reviewing the promotions that caught the eye and how well the now traditionally strong Christmas TV campaigns were translated in-store.

Promotions on display

Amongst the shoppers who were surveyed, John Lewis came out on top as 'Best for Christmas', with 79% rating it as 'good' or 'very good' for festive gifts, with Marks & Spencer in second place, with 64%. Our survey revealed that percentage savings were the most noticeable overriding promotional mechanic in-store in the run up to Christmas 2015. Of the shoppers taking part in our study, 77% said that they saw price discount messages, 19% said they were aware of multi-buy (e.g. 3 for 2 or Buy One Get One Free) promotions whilst, perhaps surprisingly, only 1% of shoppers said they noticed promotions that offered a free gift with purchase.

What was the main promotional message you could see in-store?



77% percentage price discount

19% Multi-buy

4% Loyalty card holder discount

1% Free gift with purchase



Image: John Lewis



Image: Boots



Image: House of Fraser

Festive spirit

Retailers may have focused on delivering strong Christmas messages on TV, but our shoppers found the experience in-store more than a little 'hit and miss'. While some retailers, including Boots and Marks & Spencer were praised for their Christmas range, others were singled out for their distinct lack of Christmas spirit and excitement, and their generally uninspiring shopping experience. One shopper commented: 'It was quite hard to find some nice Christmas promotions, with only one window a little bit interesting.' Other shoppers backed up this view, saying: 'It doesn't feel very Christmassy', with some stores being accused of feeling 'quite subdued' and of having a 'dull atmosphere'. Overall, only 21% of shoppers rated Christmas in-store displays as 'very good', while window displays fared little better with just 23% of shoppers rating them highly. House of Fraser came in for criticism for being 'poorly stocked' and with 'little Christmas display, except for a sea of reduced items labels'. The importance of investing in imaginative and engaging P-O-P display was summed up by one shopper who said it '...makes Christmas shopping a fun experience rather than a chore'.

Colour use

Perhaps we are long overdue a refresh come Christmas 2016. The 'trend' for chic black Christmas trees never really did catch on; maybe an injection of purple is what's called for? Either way, retailers have to be careful to balance the need for a consistently well-executed festive theme in-store and avoiding the risk of becoming visual wallpaper. Or should that be wrapping paper?

Best for Christmas: retailers rated 'good' to 'very good' for Christmas gifts

1st	John Lewis	79%
2nd	Marks & Spencer	64%
3rd	Boots	53%
4th	Debenhams	52%
5th	House of Fraser	46%

Campaign integration

In order to capitalise on the investment that is now made by retailers to win the battle for best Christmas ad, retailers need to extend their campaign's reach beyond the TV into store and online, delivering truly integrated festive activations. Amongst our shoppers, John Lewis and Marks & Spencer top the list for 'most seen' Christmas TV ad, with John Lewis achieving 73% recall for its 'Man on the Moon' ad, compared with Boots with just 28%. We identified that the effectiveness with which this is achieved is still questionable. While 52% of shoppers believed the in-store Christmas campaigns successfully mirrored the retailers' TV advertising campaigns, a worrying 27% rated campaign integration as 'average', with 21% labelling it as 'poor'.

Sources:

POPai Christmas 2015 Shopping Experience Survey, Roamler

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FUTURE RETAIL

It's perhaps unsurprising, given that the next big thing can quickly look like old news. Apps continue to face the hurdle of lasting beyond novelty factor and earning their place on shoppers' smartphones. At the same time, flashy technology like augmented reality appears to finally be moving from gimmick to delivering real ROI. However, it is the mainstays of retail – such as customer service, engagement and theatre – that remain paramount. What is certain is that increasing investment in innovation labs is sure to reap some fascinating disruption over the coming months.

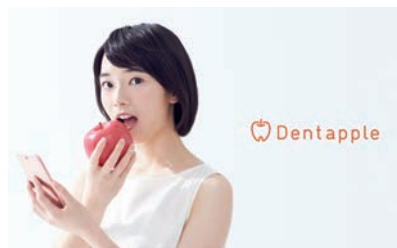
GDR Creative Intelligence is a London-based foresight agency, which provides the world's leading retailers and brands with all the intelligence and analysis they need to make smarter choices – online, in-store and in person.

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 emailed to POPAI members soon.

To find out more, contact colin@gdruk.com
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What's Next for Retail: eepurl.com/IgV95

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Matsumoto Apple Association: JAPAN



The 'health' of the grocery retail sector has repeatedly been called into question recently. But in Tokyo, fresh produce and innovation have come together in an interesting way to promote better dental care, and create a healthy upsurge in

Fuji apple sales. Offering a free dental consultations with every purchase, apples feature a sticker that includes a QR code which, when scanned, downloads the Dentapple app. Users are instructed to take four bites out of the apple and upload an image of their bite mark to the app. They are also asked to answer a few questions about their dental history. Within 24 hours they are sent an assessment by a dental hygienist, offering an opportunity for busy people to get a quick check-up. The consultation results will include the risk levels of tooth decay and periodontal disease. The Fuji apple retails at ¥200 (£1.15). It is available online and at eight grocery stores in Tokyo.

Wrapify: USA



It is said that the point-of-purchase now extends beyond the four walls of store, with retailers and brands recognising the importance of communicating with

shoppers on their journey to the store. San Francisco-based startup Wrapify has taken this concept one step further, letting drivers turn their cars into moving billboards, with brands paying them to promote their products on four wheels. Drivers decide the extent that their car will be wrapped in advertising (either partial or full coverage), and the brand they wish to be associated with. Brands can track the driver through Wrapify's smartphone app and receive real-time visualised dashboards of car impressions, so they know how many people are seeing their advertisement. Drivers can also be directed to park their car in prime locations or perhaps sit in traffic during rush hour on a major highway. The greater the exposure, the greater the payment received. Wrapify users earn an average of \$450 (£320) per month.

Pimkie: BELGIUM



The concept of creating vending machine-style point-of-purchase delivery out of store continues to grow in popularity. But now French high street

fashion label Pimkie has chosen to team up with a boutique hotel in Belgium to provide its guests with a wardrobe full of clothes for sale, in a mini bar. Customers entering the Banks Boutique Hotel in Antwerp will find several outfits awaiting them inside the Mini Fashion Bar, accompanied by a menu featuring additional sizing and pricing information. This menu also features a QR code that links guests to the Pimkie e-commerce site. Guests who can't find an outfit in their size can call reception for assistance, while those wishing to buy a garment at the end of their stay can pay for it at check out alongside their room fees.

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TALKING SHOP

Industry Update

Our round-up of stories from across the industry catching our eye this issue includes the launch of the 2016 POPAI Awards, details of the forthcoming Spring POPAI Seminar, and the appointment of POPAI's new client services manager.

Awards

P-O-P Stars Top10

POPAI Awards 2016



The POPAI Awards is marking its 10th anniversary. In a showcase for those dedicated to achieving excellence in-store, over the last decade POPAI has celebrated the role of retail marketing with the Awards becoming the ultimate symbol of creativity, innovation and best practice – a hallmark of P-O-P excellence. With entries to the 2016 Awards now officially open, it promises to once again be a frenetic few months ahead as retail brands and their suppliers once again begin uploading what they hope will be the winning entries when the judges sit down to shortlist the nominees in June. The official entry guide is available to download, featuring essential information about entry criteria, the categories you can enter, key dates, details of the judging process, and more.

www.popai.co.uk/awards

Library

Searching for insight

Online



This year's Retail Marketing Conference 2016 was held in February, bringing key industry figures and delegates together in central London to discuss a host of key in-store related issues. Materials from this year's conference are now online, featuring presentations from a wide range of key thinkers in the industry, from companies such as Vodafone, Unilever and Twitter. These timely and informative presentations cover topics such as the changing face of shopper marketing in a digital world and how to get shoppers to stay and engage in-store for longer. Meanwhile, Retail Week stores editor John Ryan gave a frank review of whether shoppers are becoming tired of technology, and an assessment of how much it really adds to the bottom line – citing the pitfalls as well as the positives, including the innovative New York store concept from eyewear brand, Warby Parker. Download presentations at the POPAI online library.

www.popai.co.uk/market-intelligence

Seminar

Beauty tips

London



The POPAI Spring Seminar is fast approaching. Taking place on April 21, it will bring together retail marketing professionals to gain unique best practice insight, as well as to share, debate and network with their peers. Our first quarterly seminar of the year takes place at the London Transport Museum and will see Benefit Cosmetics, accompanied by creative agency Breed, giving a presentation on the topic of connected retail. Joining them on stage will be Camelot and its installation partner, Momentum Instore, along with Colin Gentry from GDR Creative Intelligence, who will once again bring attendees a glimpse into some of the latest eye-catching innovations engaging shoppers around the world.

www.popai.co.uk/events

Events

Look of luxe

Luxury Displays



Aspiration is the new expectation; shoppers want the best. And they want it now. It has resulted in the rise of 'mass luxury' with countless stores striving to create shopping experiences that are more 'department store chic' and less 'supermarket cheap'. The luxe look can now be found everywhere, with aspirational messaging built into all sorts of brand displays, from washing powder to car forecourts. On May 26, POPAI will host a special event that will examine how the 'push for posh' is affecting mainstream retail displays, showcasing case studies of the luxury phenomenon, what it means for brands, and ways in which marketers can inject a touch of premium into their own displays. More details can be found on the POPAI website. www.popai.co.uk/events

News

Service with a smile

Membership



POPAI membership offers your business the ability to tap into the very best industry resources. If you want to know more about membership benefits or how to get the most from your subscription, POPAI's recently-appointed client services manager, Tom Ford, is now on standby to answer any questions. With a proven track record of delivering outstanding membership services support, his role will see him focused on serving the needs of existing members as well as on improving the membership experience going forward. Email him. – tom@popai.co.uk

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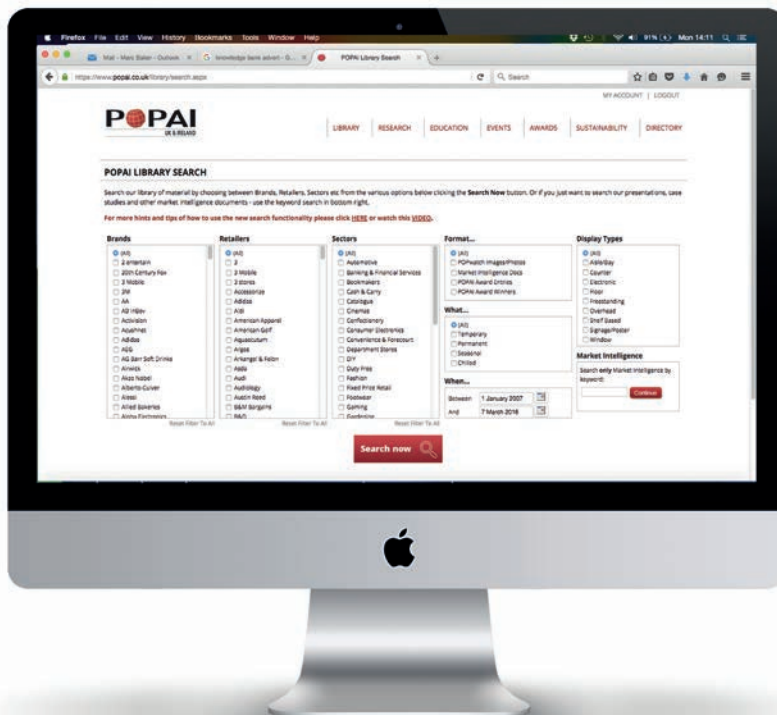
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OBSERVATION

Issue 25

A cold can slow down the best of us. But our stoic desire to soldier on regardless perhaps typifies something else that is all too common. After all, listening to what we are being told and taking action, before it's too late, is nothing to be sniffed at.

Allow me to set the scene. The past few months have been filled with lots of things – Christmas turkey, New Year alcohol, and Valentine's Day chocolates. But also, for many, this time of year is plagued with the coughs and sneezes that accompany the dreaded winter cold. Why does it always seem to creep up on us at this time of year?

In truth, the warning signs are often there long before it strikes us down. 'I'm too busy to be ill' is a common refrain, and so we choose to ignore our body, pushing through the early hints it gives us that all is not well until we can struggle on no more. The result of this is that we are finally floored just at the moment when we have an opportunity to enjoy the rewards of all our hard work. By the time we realise something must be done, the course to our duvet and days off has already been charted. We get sick. Our ability to function effectively deserts us. If only we'd listened to what our body had been trying to tell us sooner.

For a while now, I have believed that the NHS should introduce regular annual health checks. Like vehicle MOTs, they would give us a simple certificate of 'road worthiness' and, more importantly, offer up a chance to remedy any potential issues before they turn into something bigger for the patient and more costly for the health service. Instead, we continue to treat only what's in front of us.

In the world of in-store too, it is often difficult to be anything other than focused on the 'here and now'. Lead times are shrinking. The pressures to perform are growing. But taking time out to check that your P-O-P is in good health can, so often, make all the difference.



The start of the year is a time when many go on a purge, but it's also when many good intentions fail and we revert back to bad habits. Judging by the number of people attending the POPAI Annual Retail Conference and recent Innovation Workshop, as well as the thousands of visitors who made their way to Retail Design Expo, the industry seems more determined than ever to avoid doing the latter. After all, as the saying goes, 'prevention is better than cure'.

As you plan any aspect of your in-store strategy, the health of your brand's relationship with your shopper should always be the first port of call. As one leading industry speaker highlighted to assembled delegates at the POPAI Conference: the channels we shop, the rules of engagement, shoppers' search and selection process – they are all changing. The path to purchase is no longer linear, meaning that a deeper understanding of shopper behaviour, needs and expectations has never been so important.

Thankfully, today's retailers have more insight and data on shoppers at their fingertips than ever before. But whilst on the one hand the amount of insight and data available to retailers these days is a blessing, it can also be a curse, if you don't know what you are looking for or how to interpret it – the equivalent of trying to conduct medical self-diagnosis using Google.

Perhaps that is why many marketers still often prefer to trust their gut when taking key decisions. I recently read a report which claimed 45% of marketers admitted to 'primarily trusting their intuition when making decisions about strategies'. Though there is no doubting that past experience counts for a lot, our failure to often look after our own wellbeing proves just how prone we are to bouts of ill judgement – often ignoring the obvious that is right in front of us. It's why this issue is once again dedicated to prescribing a healthy dose of insight and commentary to help make decisions more informed, and deliver P-O-P campaigns that are truly fit for purpose. I hope you enjoyed. editor@popai.co.uk.

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