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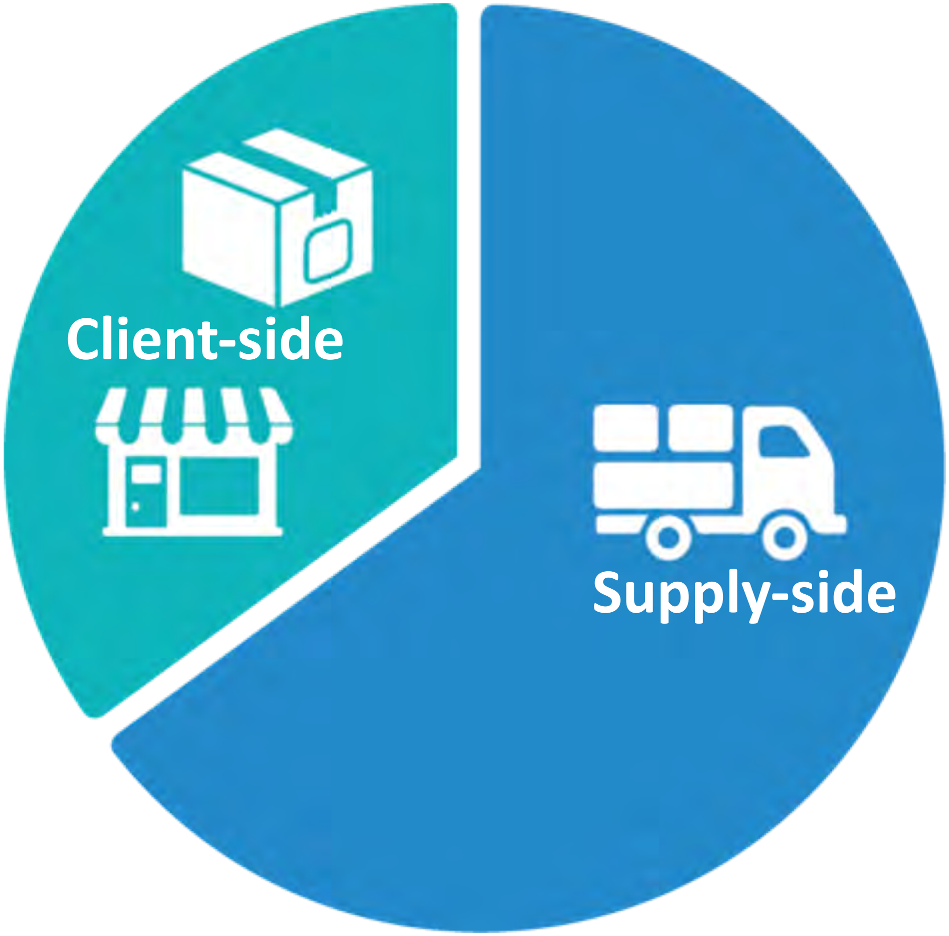

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In-store Insights Issue 35 (September 2018)

Display Best Practice: Cosmetics, Beauty, Hair & Fragrance (Full report)

Storedits: Consumer Electronics (Overseas)

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Brand(s)

(All)

Retailer(s)

(All)

Select All

Bodycare

Booths

Boots

Boxpark

BP

Brooks Brothers

Budgens

Build-A-Bear

Burger King

Display Types

(All)

Permanent **Temporary**

Date

From: (All)

To: (All)

Brand Area(s)

(All)

Seasonal Type

(All)

POPWatch Edition

(All)

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Brand(s)
(All)

Retailer(s)
(All)

Display Types
(All)
Select All
Aisle/Bay
Counter
Electronic
Floor
Freestanding
Overhead
Shelf Based
Signage/Poster
Window

Date
From: (All)
To: (All)

Brand Area(s)
(All)

Retail Sector(s)
(All)

POPWatch Edition
(All)

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Brand(s)

(All)

Retailer(s)

(All)

Display Types

(All)

Permanent **Temporary**

Date

From: (All) (All)

To: (All) (All)

Brand Area(s)

(All)

Retail Sector(s)

(All)

Select All

DIY

Duty Free

Fashion

Fixed Price / Value

Footwear

Seasonal Type

(All)

POPWatch Edition

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Brand(s)
(All)

Retailer(s)
(All)

Display Types
(All)
Permanent ✓ **Temporary** ✓

Date
From: (All)
To: (All)

Brand Area(s)
(All)

Retail Sector(s)
(All)

Seasonal Type
(All)
Select All
Back to School
Christmas
Easter
Halloween
Mother's Day/Father's Day

POPWatch Edition
(All)

Search n

#37

Brand: Brother

Retailer: Ryman

REPORT THIS PHOTO

Display Type: Electronic, Perm

Edition: September 2018

Include in PDF?

#38

Brand: Wrigley

Retailer: Poundland

REPORT THIS PHOTO

Display Type: Counter, Perm

Edition: September 2018

Include in PDF?

#39

Brand: -

Retailer: Tesco

REPORT THIS PHOTO

Display Type: Aisle/Bay, Perm

Edition: September 2018

Include in PDF?

#40

Brand: Unilever

Retailer: Pumpkin

REPORT THIS PHOTO

Display Type: Counter, Perm

Edition: September 2018

Include in PDF?

#41

Brand: Crown Paints

Retailer: Wilko

REPORT THIS PHOTO

Display Type: Aisle/Bay, Perm

Edition: September 2018

Include in PDF?

#42

Brand: -

Retailer: Footlocker

REPORT THIS PHOTO

Display Type: Counter, Perm

Edition: September 2018

Include in PDF?

#43

Brand: EE

Retailer: EE

REPORT THIS PHOTO

Display Type: Electronic, Perm

Edition: September 2018

Include in PDF?

#44

Brand: -

Retailer: JD

REPORT THIS PHOTO

Display Type: Electronic, Perm

Edition: September 2018

Include in PDF?

#45

Brand: -

Retailer: WHSmith

REPORT THIS PHOTO

Display Type: Aisle/Bay, Temp

#46

Brand: -

Retailer: Decathlon

REPORT THIS PHOTO

Display Type: Electronic, Perm

#47

Brand: -

Retailer: Vision Express

REPORT THIS PHOTO

Display Type: Electronic, Perm

#48

Brand: -

Retailer: Body Shop

REPORT THIS PHOTO

Display Type: Electronic, Perm

Click to create a PDF with selected images (currently 0 selected)

Select All

Brand: Fitbit

Display Type: Electronic, Perm

Retailer: Jenners

Edition: October 2018

image 26


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1992-2017
POPWatch
This PDF was generated on Monday, 12 November 2018 @ 16:15 using th
Retailers: ALL
Brands: ALL
Display Types: Temporary or Permanent - Aisle/Bay ,Electronic ,
Seasonal Types: ALL
Date Range: December 2012 to November 2018
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POPWatch Library Export
Brand: Fitbit
Retailer: Jenners
Display Type: Electronic
Published: 18 Oct 2018
Brand: Rayban
Display Type: Aisle/Bay
Brand: Microsoft
Brand: Brother
Retailer: Ryman
Display Type: Electronic
Published: 6 Sep 2018
Retailer: Footlocker
Display Type: Counter
Retailer: Spar
Display Type: Aisle/Bay
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Brand(s) (All)

Retailer(s) (All)

Display Types (All)

Perm | Temp

Year(s) Of Awards (All)

Winners Only

Keywords

Brand Area(s) (All)

Retail Sector(s) (All)

Seasonal Type (All)

Entrant (All)

NEW!

#1

Ronseal 6-in-1 display

Brand: Ronseal
Retailer: B&Q
Entry Year: 2018
SU. Sustainability
Winner: Gold
Display Type: Shelf Based, Temp
Read more...

#2

Mondelez EasyRep FSDU

Brand: Mondelez
Retailer: -
Entry Year: 2018
SU. Sustainability
Winner: Silver
Display Type: Freestanding, Temp
Read more...

#3

Sustainable flagship store concept

Brand: -
Retailer: -
Entry Year: 2018
SU. Sustainability
Winner: Bronze
Display Type: Window, Temp
Read more...

#4

My Little Pony Interactive Experience

Brand: Hasbro
Retailer: -
Entry Year: 2018
IN. Innovation
Winner: Silver
Display Type: Aisle/Bay, Perm
Read more...

#5

Rug Sizer - IKEA

Brand: -
Retailer: -
Entry Year: 2018
IN. Innovation
Winner: Gold
Display Type: Electronic, Perm
Read more...

#6

Malteaster gondola end topper

Brand: Mars
Retailer: -
Entry Year: 2018
IN. Innovation
Winner: Gold
Display Type: Shelf Based, Temp
Read more...

#7

Sensations Wholesale TukTuk WOW Display

Brand: PepsiCo
Retailer: -
Entry Year: 2018
23. Wholesale
Winner: Gold
Display Type: Freestanding, Temp

#8

Mercedes-Benz Vans Lifestyle Store

Brand: -
Retailer: Mercedes-Benz
Entry Year: 2018
20. Flagship & Store
Winner: Silver
Display Type: Signage/Poster, Temp
Read more...

#9

Consumer Electronics Department - John Lewis

#10

BULK BINS DISPENSE HEALTHY SNACKS

#11

FRESH CATEGORY ECO SHELVES

#12

Sonos Field Day European Implementation

RUG SIZER - IKEA

To return to view all award categories for this year, click here.

Entry Title	Rug Sizer - IKEA
Category	IN. Innovation
Company Name	Beaver Group
Client Company Name	IKEA
Entry Number	IN-017
Year Entered	2018

Please itemise what is included in this entry?
IKEA offer hundreds of rug options and sizes in their stores. Much of the in-store experience is based around the customer finding items themselves, and seeing all the options available in the store.

In the Textiles Department, there are around 200 rugs and floor runners to choose from. Not only does this require a lot of physical space, it presents a challenge for customers who want to compare different sizes and options.

What is the entry's targeted retail environment?
IKEA had seen that customers were regularly taking rugs from the displays to lay on the floor. Although many of the rugs had been hung up, it was still difficult to gauge the sizes as they would be once unfurled. This is due to the way in which the human eye sees shapes and sizes across different environments (such as the difference between a rug on a wall vs. on the floor).

Taking rugs from the displays was difficult and time consuming for customers (particularly with the larger sizes being nearly 4 metres long). It also required a lot of shop space to do this, and thus impacted the shopping experience of other customers. The shopping area would also not always be left in a good state for the next customer, which created additional work for the staff tidying up.

In regards to the actual sales, IKEA would see a high number of returns from customers who bought rugs. In many cases, this was simply due to them having chosen the wrong size in the store (too large or too small). For customers unable to pull out rugs to view this presented a particular problem, as the rugs are actually sold in rolled bags - which made checking the actual size even harder.

List materials and construction processes used in manufacturing:
To display the rugs, a high-powered NEC projector was mounted to a solid beam on the ceiling, using a custom made steel frame. It is positioned directly above the floor, facing downward, where it projects with a 8000 lumen laser light source. By fixing to the ceiling beam, the projector does not move and can be configured to display to exact dimensions of any given rug.

The projector choice was vital, as it needed to be robust for constant use throughout the day, mounted in a downward facing position and bright for customers to clearly see the rug displays.

With a laser light source there are several benefits. Unlike traditional bulb projectors, there is not the same requirement to replace bulbs every few months - reducing costs for replacements, eliminating this downtime and keeping the solution up and running for customers.

In addition, the laser light source has a much 'cleaner' projected image. This means that by using black backgrounds on the images - the only thing which is visible on the floor is the rug size. There is no grey border or background visible.

For the control, an all-in-one 22" AOPEN Touchscreen PC was mounted nearby. The unit is commercially graded for public use, featuring hidden ports (inaccessible to the customer) and an IP-Rated front. The IP-Rated front to the display means it is resilient and easy to keep clean, which is particularly important for a solution regularly used by different people.

The Touchscreen runs a digital signage software (signage.ninja) on the Google ChromeOS operating system. It is connected to the internet and can be updated and managed completely remotely. The Touchscreen also uses one of its display outputs for the projector - reducing the need for another media player.

What were the marketing objectives?
The objective was to create a way for customers to view different sizes of rugs in a quick and easy manner. Whether it was to view popular sizes in order to then narrow their selection, or to check the size of a chosen rug without having to move if from the display.

It would need to be simple, intuitive and clear to use. While there is often a staff member available, the solution would need to be used independently by customers without intervention. The hardware would need to be robust for public use and provide a clean user experience.

The IKEA store, while large, is a very busy space with a huge range of products on display. So the solution would need to work within a strict space limitation - essentially no larger than the largest rug available (around 4 metres x 3 metres). The hardware would also have to fit within the physical setup of the store, including power and data availability.

Of course, the rug sizes would need to be accurate - so that if it displays a rug labelled "135cm", then it actually is 135cm.

The measurement for success would be to see if customers engaged with the solution, rather than to continue pulling the physical rugs. Also to monitor the returns of the rugs due to incorrect sizing.

How the entry achieved its marketing objectives overall?
Key to the success of this solution was the simplicity of the user experience. For this, a custom application was created to run on the digital signage platform signage.ninja, designed to present a few options for the customer.

To start with, a customer can select one of several preselected 'most popular' rug sizes. These immediately display the rug choice on the floor projection, animating as they change. The rug sizes on the projected floor image are labelled and change dynamically as the customer uses the solution.

Alternatively, customers can search for a rug by article number or name - to check that rug size. The search results appear immediately, as the customer types. Once a rug is selected, the customer can select one of the furniture options as a guide to layout - for example, to see the kind of footprint a four-seater dining set may have on a rug.

The solution and rug database is stored locally on the Touchscreen PC, but can also be updated and managed remotely. This means that when a new rug is added or removed to the range, it can be updated on the solution remotely and immediately.

When not being used, the projector shows a simple animation and helps draw attention and explain what this solution offers.

IKEA also run a variety of other digital signage solutions in the store and the control for this solution fits in as another part of this estate, visible with retail and food displays in their system. To date, IKEA have rolled out hundreds of display solutions across just the UK and Ireland. So moving forward, it was important that the estate stayed on one system - rather than fragmenting the estate.

SUCCESS AND THE FUTURE
Initial customer feedback was immediate and positive. The simplicity to just see what size a rug is has been very helpful - staff have witnessed many occasions where customers regularly discuss possibilities around the rug size, before making their buying decision.

Monitoring of the 'clicks' on the interface shows it being used by an average of 25-30 unique users a day, with a user clicking through several rugs on each use. Customer returns are also being monitored and initial results show a decrease.

The solution has saved the staff time as the rug area does not need tidying up as often. Customers can now experiment with a selection of rugs more quickly on the Rug Sizer, only going to the actual rugs to feel materials and make final decisions.

The first store to receive the Rug Sizer was in IKEA Milton Keynes (UK) in late 2017. Since then it has been installed at IKEA Eindhoven (The Netherlands) and several other stores across Europe are also looking at the solution. The solution has been regionalised with unique store databases for the rugs and language options.

Development of the solution has progressed to Phase 2, which will include links to stock data from the store, improved search features and further information about the rugs themselves (such as images, materials, etc.).

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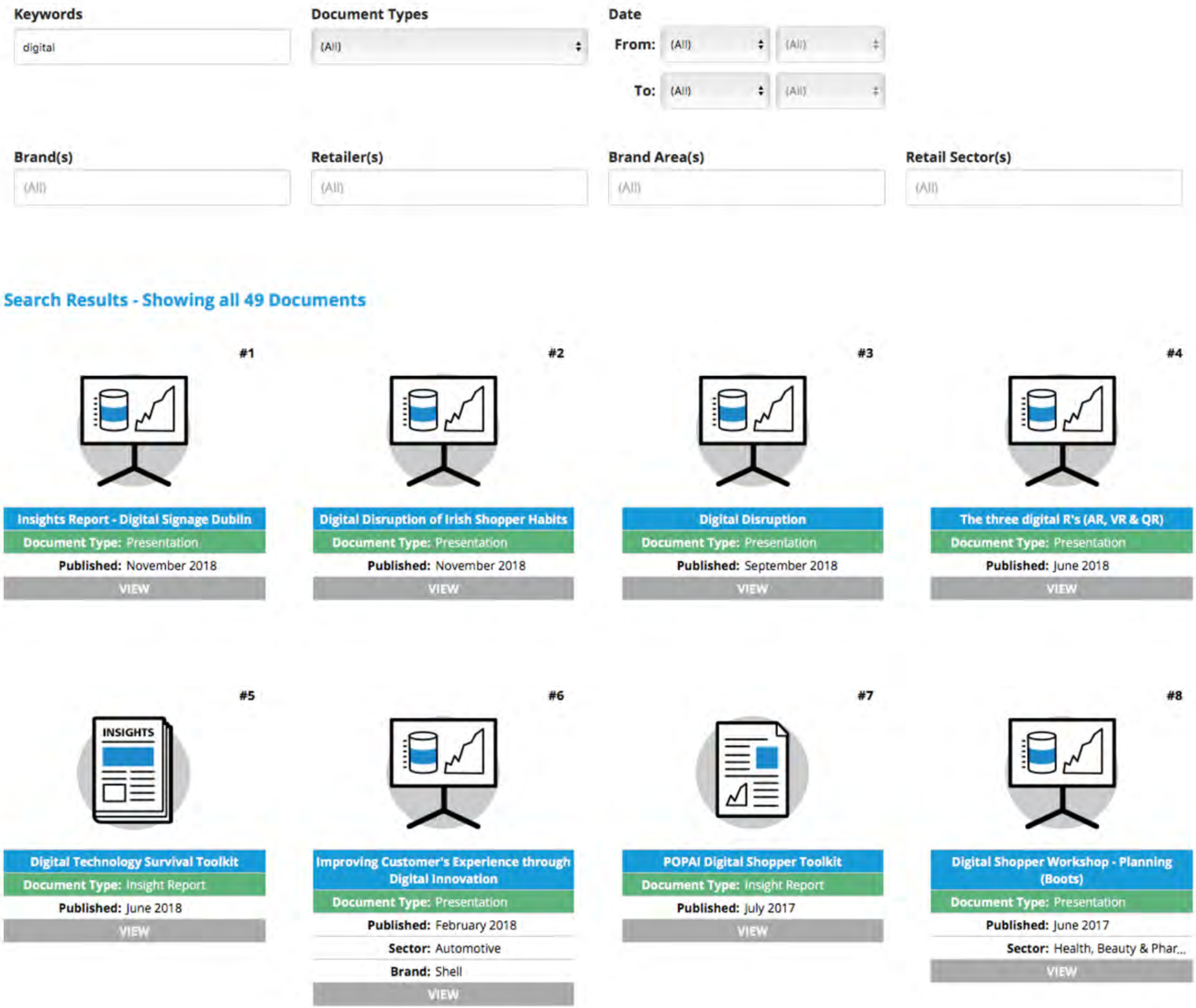
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Retailer(s)
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Brand Area(s)
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#1
Insights Report - Digital Signage Dublin
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Digital Disruption of Irish Shopper Habits
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INSIGHTS
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#6
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Document Type: Presentation
Published: February 2018
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Brand: Shell
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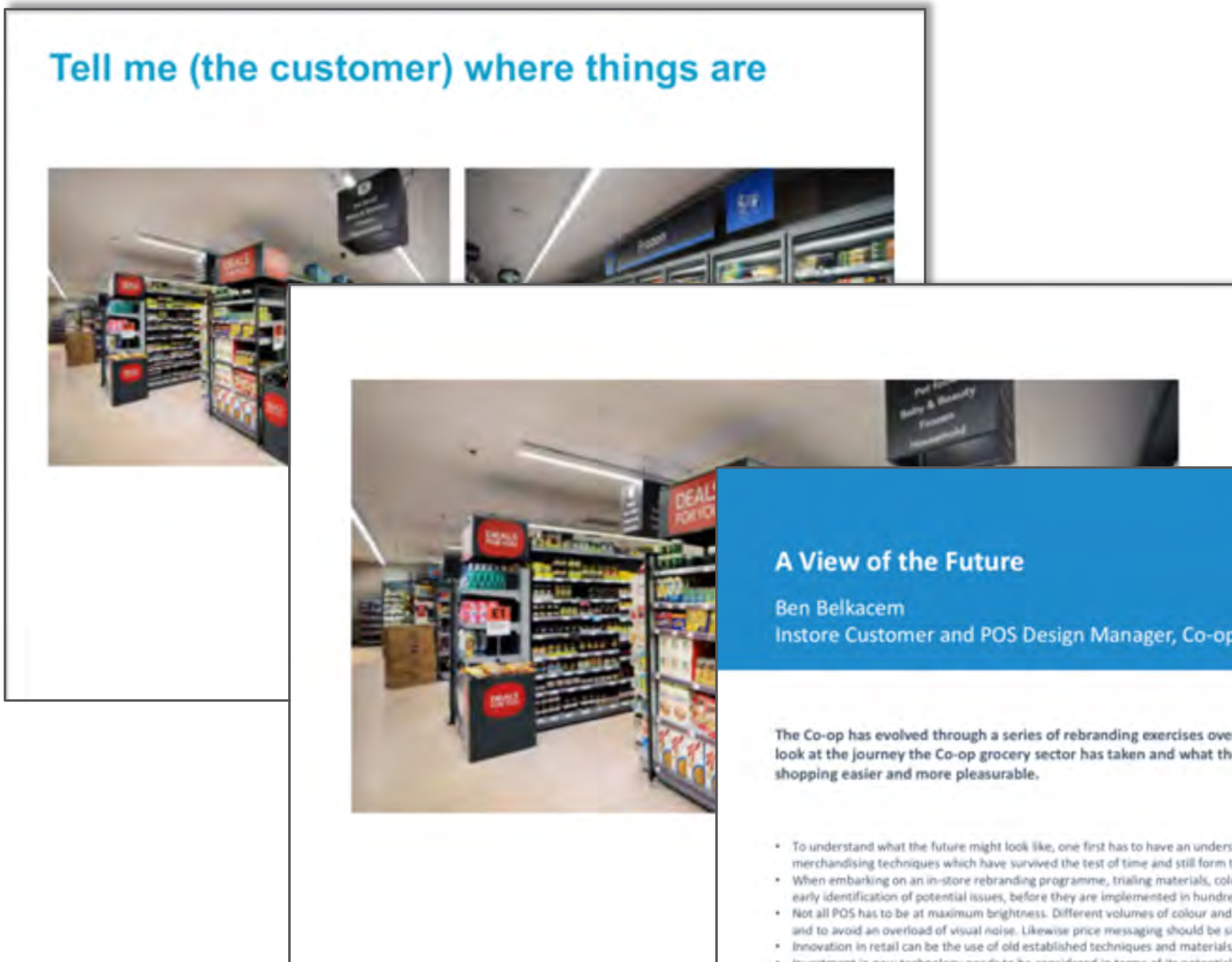
POPAI Digital Shopper Toolkit
Document Type: Insight Report
Published: July 2017
VIEW
#8
Digital Shopper Workshop - Planning (Boots)
Document Type: Presentation
Published: June 2017
Sector: Health, Beauty & Phar...
VIEW



Executive Summary

A View of the Future

Ben Belkacem
Instore Customer and POS Design Manager, Co-op

Event: Retail Marketing Conference
Date: 8th February 2018

The Co-op has evolved through a series of rebranding exercises over the past few years. Here they look at the journey the Co-op grocery sector has taken and what the future might entail to make shopping easier and more pleasurable.

- To understand what the future might look like, one first has to have an understanding of the past, in particular the tried and tested merchandising techniques which have survived the test of time and still form the basis of merchandising strategies today.
- When embarking on an in-store rebranding programme, trialing materials, colours, font sizes and product category flow is essential for early identification of potential issues, before they are implemented in hundreds of stores.
- Not all POS has to be at maximum brightness. Different volumes of colour and impact are required to communicate different messages and to avoid an overload of visual noise. Likewise price messaging should be simple and bold.
- Innovation in retail can be the use of old established techniques and materials, re mixed and re purposed.
- Investment in new technology needs to be considered in terms of its potential life cycle, which might be curtailed with the advent of yet newer innovations.
- All in-store evolution should be aimed at making the shopping task easier: simple navigation, simple communication, making the shopper happy, not angry.

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SHOPPER INVESTIGATION

Unsurprisingly, price was also the most frequent promotional message in windows, seen in over half of all stores visited. A generic 'save' message was seen in 41% of stores followed by seasonal messages in 31%.

This simplicity of messaging is key as almost half of shoppers say they shop at discounters because they instinctively know they're getting good value, without having to work out promotions.[5]

Promotional key messages seen in the window

96% of pound store windows featured a price message

88% of pound store windows featured brand names

25% of stores featured outdoor media

Source: POPAI/Roamler

Pricing of items in-store was found to be quite or very easy to understand by the majority of shoppers in our survey. However, despite this, many shoppers commented on the confusion caused in Aldi and Lidl where prices often appear above the item rather than below, a practice possibly bought over from the continent.

The clear pricing of items could be especially important in pound shops which are beginning to stock products which retail for more than a pound. Where these were featured, separate pricing was found to be clear and included on shelf strips, or on separate signage on dump bins or free-standing display units.

Colour coding on P-O-P was used in many stores to highlight special offers including in Lidl where a shopper commented, "The pricing was laid out quite well – in general they used white labels, but for special offers green and orange labels where used, which was quite helpful."

The till areas featured products in 97% of stores visited with just under half as promotions. These included products such as confectionery, healthy snacks, batteries, drinks and painkillers, with promotions such as manager specials, star buys and multi-buys.

P-O-P in-store

Just over half of high street discount shoppers say that in-store displays encourage them to buy products they had not intended to purchase on that trip,' so getting them right is paramount.

An average of 4 display types were spotted in the discounters visited. End-of-aisle displays were particularly popular in the discount sector, especially in Lidl and B&M. Ceiling hanging posters were a

87% of stores visited featured branded displays

Source: POPAI/Roamler

Type of display seen in each store

Shelf edge signage · Ceiling hanging posters · Posters · Free-standing display units · Dump bin · End of aisle displays · Wall displays

Source: POPAI/Roamler

Top 10 brands with displays spotted in-store

34% · 16% · 13% · 11% · 9% · 9% · 7% · 6% · 6% · 6%

Source: POPAI/Roamler

Multi-buys are also popular in pound stores, featuring in 58% of those visited with managers' specials and 'save' messages working together in slogans such as 'big brands, big discounts'.

Improving the in-store environment

There are clear signs that discounters have some opportunities to improve their in-store environment. Worryingly, 22% of discount shoppers say they don't like shopping in discounters but simply do so for the savings.[4] Factors such as speedy check-out targets in Aldi – which claims its check-out process is up to 40% quicker than its competitors due to large barcoded products[5] – may add to the 'hectic' experience.

Pound stores also receive negative comments, with our shoppers commenting on product overcrowding and being bombarded with signage. However, some found the environments pleasant and spacious – so it seems it is each to their own when it comes to discounters.

Maybe the discount sector can be summed up with the following Aldi shopper quote: "The shopping environment is not as pleasant as the big four supermarkets but prices are quite a lot cheaper".

It seems discounters have plenty of potential to continue their spectacular growth. With the increase of 'little-and-often' shopping and customers looking for a bargain, they have obvious appeal. However, they need to be at the top of their game and shift their focus to their in-store environments, with shoppers now seeking quality and service alongside value.

Our research

We asked respondents to visit 100 discount stores in February 2017 and to record their experience in-store. We asked them about their shopping habits, window displays, key messages and P-O-P displays.

The percentage of shoppers who saw this type of promotional message in-store

Price	Save	Price discount	Volume discount /Multi-buy	Seasonal	Percentage discount	New	Other
78%	64%	39%	32%	31%	30%	15%	8%

Source: POPAI/Roamler

Key messages seen in various parts of the store

'Price' messages found

Window	Entrance	Rest of store
36%	78%	56%

'Save' messages found

Window	Entrance	Rest of store
21%	64%	41%

Source: POPAI/Roamler

To find out more about retail analytics specialist, Roamler, please contact David Viles on 07827 939303 or david.viles@smollan.co.uk.

Sources:

[1] BBC, The unstoppable rise of the discounters, 2015

[2] Shoppercentric, Shopper Stocktake 2017

[3] Kantar Worldpanel, Aldi becomes UK's fifth largest grocer, 2017

[4] Shoppercentric, The rise of the discounters, 2014

[5] Business Reporter, 'Big shop' at Aldi and Lidl, 2017

[6] In-store Insights, Insight Report: Grocery Shoppers, 2016

[7] IGD, What do high street discount shoppers want?, 2014

[8] Retail Week, Could Aldi gatecrash grocery's big four party?, 2017

CONSUMER ELECTRONICS

With an increasingly challenging landscape and fierce competition, brands and retailers in the consumer electronics sector need to be ever more innovative, creative, and disruptive. Ambitious retailers will ignore the importance of effective P-O-P at their cost. So when it comes to display best practice, what is switched-on thinking and what simply falls flat?

Challenging times for consumer electronics

The last five years have been undeniably challenging for specialist consumer electronics retailers. POPAI's 2016 shopper investigation revealed a number of key hurdles for these retailers, in particular intensifying competition from retailers outside the sector.

It seems that technology sales cannot continue at the same pace and, while the industry's revenue is still worth an impressive $9 billion, most consumer electronics products reached saturation point in 2016. This was demonstrated by declining retail sales driven by increasing penetration rates and longer replacement cycles in many categories.

The market's current landscape shows a split between specialist electrical retailers and general retailers which sell electronic goods as part of a wider offering, such as department stores and supermarkets. While the latter have reduced their ranges over the past four years, the popularity of online shopping continues to be a threat to consumer electronic specialists.

Systematic shoppers

Shoppers in this sector regularly research their products before they buy, mainly online. Less than a third use in-store as part of their research. However, significantly more shoppers prefer to make their purchases in-store.

Therefore, getting the right retail environment is crucial for driving sales. Savvy retailers will consider as many sales drivers as possible, such as try-before-you-buy and providing clear, detailed product information. While assisted service is high, with 41% of our shoppers approached by staff, that still leaves the majority of shoppers left to browse by themselves and rely on in-store information.

With new technology constantly on offer, today's shoppers are increasingly demanding, desiring new products with

When researching consumer electronic products, which method do you use? online/in-store

23% 77% Overall
22% 78% Single
20% 80% Couple
28% 72% Family

Source: POPAI/Roamler

When buying cons... channel do you us...

41% 59% Overall

Source: POPAI/Roamler

2 | DISPLAY BEST PRACTICE REPORT | www.popai.co.uk

We discovered seven best practices which the best displays all have in common.

1. Premium players

Over two-thirds of award-winning designs were described as either premium or high quality, primarily to accentuate the premium nature of the product. Materials also played a key role, with displays using finishes such as brushed stainless steel, anodised aluminium and walnut veneers. However, it is clear that the two materials of choice are acrylic and powder-coated steel.

Acrylic features in all but two award winners and its use ranges from structural applications to price ticket holders. Award-winning applications have included:

- Polished acrylic for the graphics on Amazon's Echo & Dot Interactive CTU.
- 20mm-thick clear acrylic to create the illusion and premium feel of a thick glass base on Intel's 2-in-1 Risers.
- LED back lit opal acrylic, as seen on the Next Generation Hive PoS.
- A clear acrylic lens used as a security application to protect the iPod on the Launching Hive into Retail display.
- Illuminated frosted acrylic on Panasonic's HTE80 Soundboard 'Experience' POS.
- Cladding the steel and MDF frame on Sony's Xperia Interactive Demo Bay with acrylic.

Powder-coated steel is used in over half of the award winners, predominately as the main structure for counter-top displays and for security applications like Apple's Mobile Tech Security Solution. Finishes vary from being screen printed, clad with clear acrylic, or left bare.

www.popai.co.uk | DISPLAY BEST PRACTICE REPORT | 3

Consumer Electronics Category | WINNERS 2017

Also BRONZE in the Display of the Year, Permanent Display category

10" Totem Gaming Conversion Kit

arken POP

Intel Corporation (UK)

"I was impressed with the initiative the supplier demonstrated, to take an end-of-line display unit and utilise it to create something that looked completely different and had the look and feel of a gaming display. This not only had positives from a budget perspective but was a huge success from a sustainability point of view."

Tyron Fussell, EMEA Channel Go-To-Market Instore Experience Manager

The judges said:

"A super-premium execution that reuses existing materials, delivering cost saving and strong sustainability credentials."

"The digital elements drive engagement with shoppers testing laptops in-store."

"It was successfully rolled out across the world."

...the Innovation category

...& Dot Interactive CTU

...ges said:

Microsoft Surface Furniture FY17

ARNO GB

Microsoft Corporation

The judges said:

"Premium look and feel."

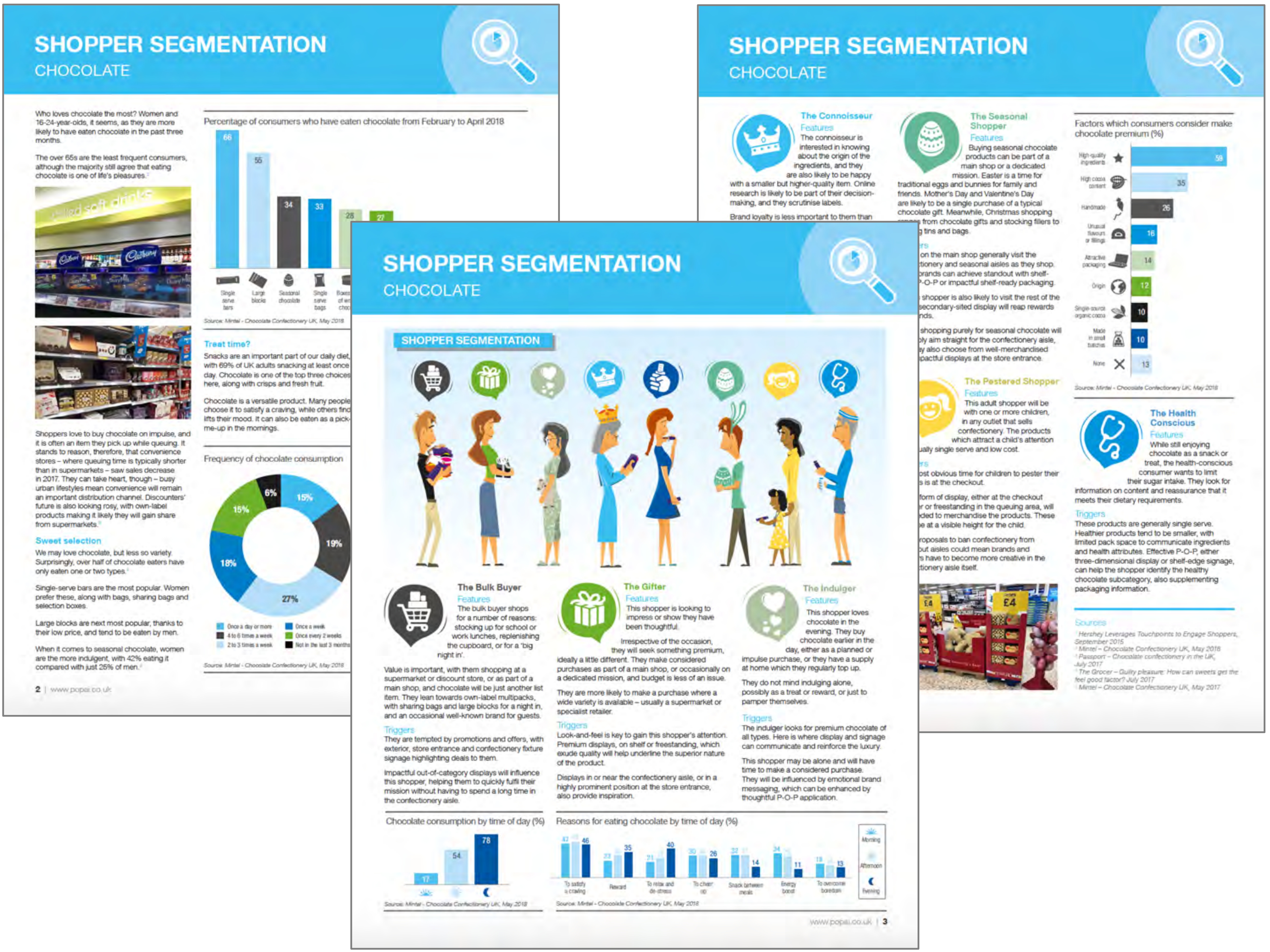
"Presents full product range including accessories."

"Actively encourages shopper interactivity with use of pens."

"Good clean, clear design."

...s case studies on the POPAI website: Click here

...CTICE REPORT | www.popai.co.uk



SHOPPER SEGMENTATION
CHOCOLATE

Who loves chocolate the most? Women and 16-24-year-olds, it seems, as they are more likely to have eaten chocolate in the past three months.

The over 65s are the least frequent consumers, although the majority still agree that eating chocolate is one of life's pleasures.[2]

Shoppers love to buy chocolate on impulse, and it is often an item they pick up while queuing. It stands to reason, therefore, that convenience stores – where queuing time is typically shorter than in supermarkets – saw sales decrease in 2017. They can take heart, though – busy urban lifestyles mean convenience will remain an important distribution channel. Discounters' future is also looking rosy, with own-label products making it likely they will gain share from supermarkets.[3]

Sweet selection

We may love chocolate, but less so variety. Surprisingly, over half of chocolate eaters have only eaten one or two types.[4]

Single-serve bars are the most popular. Women prefer these, along with bags, sharing bags and selection boxes.

Large blocks are next most popular, thanks to their low price, and tend to be eaten by men.

When it comes to seasonal chocolate, women are the more indulgent, with 42% eating it compared with just 25% of men.[4]

Percentage of consumers who have eaten chocolate from February to April 2018

Source: Mintel - Chocolate Confectionery UK, May 2018

Treat time?

Snacks are an important part of our daily diet, with 69% of UK adults snacking at least once a day. Chocolate is one of the top three choices here, along with crisps and fresh fruit.

Chocolate is a versatile product. Many people choose it to satisfy a craving, while others find it lifts their mood. It can also be eaten as a pick-me-up in the mornings.

Frequency of chocolate consumption

Source: Mintel - Chocolate Confectionery UK, May 2018

SHOPPER SEGMENTATION
CHOCOLATE

SHOPPER SEGMENTATION

The Bulk Buyer

Features

The bulk buyer shops for a number of reasons: stocking up for school or work lunches, replenishing the cupboard, or for a 'big night in'.

Value is important, with them shopping at a supermarket or discount store, or as part of a main shop, and chocolate will be just another list item. They lean towards own-label multipacks, with sharing bags and large blocks for a night in, and an occasional well-known brand for guests.

Triggers

They are tempted by promotions and offers, with exterior, store entrance and confectionery fixture signage highlighting deals to them.

Impactful out-of-category displays will influence this shopper, helping them to quickly fulfil their mission without having to spend a long time in the confectionery aisle.

The Gifter

Features

This shopper is looking to impress or show they have been thoughtful.

Irrespective of the occasion, they will seek something premium, ideally a little different. They make considered purchases as part of a main shop, or occasionally on a dedicated mission, and budget is less of an issue.

They are more likely to make a purchase where a wide variety is available – usually a supermarket or specialist retailer.

Triggers

Look-and-feel is key to gain this shopper's attention. Premium displays, on shelf or freestanding, which exude quality will help underline the superior nature of the product.

Displays in or near the confectionery aisle, or in a highly prominent position at the store entrance, also provide inspiration.

The Indulger

Features

This shopper loves chocolate in the evening. They buy chocolate earlier in the day, either as a planned or impulse purchase, or they have a supply at home which they regularly top up.

They do not mind indulging alone, possibly as a treat or reward, or just to pamper themselves.

Triggers

The indulger looks for premium chocolate of all types. Here is where display and signage can communicate and reinforce the luxury.

This shopper may be alone and will have time to make a considered purchase. They will be influenced by emotional brand messaging, which can be enhanced by thoughtful P-O-P application.

Chocolate consumption by time of day (%)

Source: Mintel - Chocolate Confectionery UK, May 2018

Reasons for eating chocolate by time of day (%)

Source: Mintel - Chocolate Confectionery UK, May 2018

SHOPPER SEGMENTATION
CHOCOLATE

The Connoisseur

Features

The connoisseur is interested in knowing about the origin of the ingredients, and they are also likely to be happy with a smaller but higher-quality item. Online research is likely to be part of their decision-making, and they scrutinise labels.

Brand loyalty is less important to them than

The Seasonal Shopper

Features

Buying seasonal chocolate products can be part of a main shop or a dedicated mission. Easter is a time for traditional eggs and bunnies for family and friends. Mother's Day and Valentine's Day are likely to be a single purchase of a typical chocolate gift. Meanwhile, Christmas shopping

The Pestered Shopper

Features

This adult shopper will be with one or more children, in any outlet that sells confectionery. The products which attract a child's attention

Factors which consumers consider make chocolate premium (%)

Source: Mintel - Chocolate Confectionery UK, May 2018

The Health Conscious

Features

While still enjoying chocolate as a snack or treat, the health-conscious consumer wants to limit their sugar intake. They look for information on content and reassurance that it meets their dietary requirements.

Triggers

These products are generally single serve. Healthier products tend to be smaller, with limited pack space to communicate ingredients and health attributes. Effective P-O-P, either three-dimensional display or shelf-edge signage, can help the shopper identify the healthy chocolate subcategory, also supplementing packaging information.

Sources
1 Hershey Leverages Touchpoints to Engage Shoppers, September 2015
2 Mintel – Chocolate Confectionery UK, May 2018
3 Passport – Chocolate confectionery in the UK, July 2017
4 The Grocer – Guilty pleasure: How can sweets get the feel good factor? July 2017
5 Mintel – Chocolate Confectionery UK, May 2017

Weighing up the costs

Price remains highly important to shoppers, with research showing this to be the case even with those buying prestige brands.[5] This presents both challenges and opportunities, with the value-led retailers delivering impressive growth. Meanwhile, department stores and niche specialists are using unique experiences to drive shoppers in-store and encourage them to trade up to more premium products.

Health and beauty shoppers may have very different missions in mind. For example, picking up a toiletry item or buying a new lipstick for a night out with friends provide very different purchase motivations. It may be a planned purchase for a favourite brand of toothpaste, a promotion-driven bargain buy or simply a browsing mission for the perfect shade.

3.5 The average number of messages in windows of Boots and Superdrug

Source: POPAI

Impressions count

Our audit found that retailers such as Boots and Superdrug focused their window promotions on seasonal messaging to entice shoppers in-store, followed by in-store savings in just over a quarter of the windows. Other promotions included products with prices and messaging around new products.

Window displays were often basic, with posters featuring in 78%, and window graphics, free-standing units and plinths used occasionally.

In-store: a range of different l

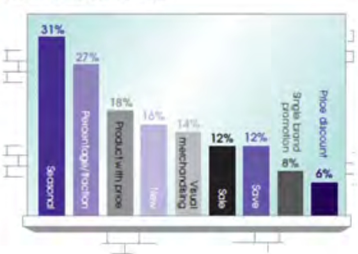
Helping shoppers find what they ar looking for is key, and the majority stores we surveyed made this 'quite 'very' easy. Similarly, our audits foun navigational signage in nearly three quarters of the stores, being an ove sign, on top of aisles or wall-mounte

The layout of stores was noticeably different. Department stores focuse brand or concessions, while special Boots and Superdrug based their la on category.

For the most part, browsing departm stores' beauty halls required brand knowledge, with the possible intent encouraging shopper dwell time.

In-store messages were mixed, with most popular across all the stores b

Window promotional messages



In-store p

Source: POPAI

Many interesting displays were identified in the stores we surveyed, with an average of 5 different types in each store. Free-standing display units were a firm favourite across all stores.

Technology: one to watch?

Shopper technology was also apparent in this sector, with digital screens appearing in nearly two-thirds of the department stores and nearly a quarter of health and beauty stores in our audit. These often comprised passive screens looping brand content. While this may catch the shopper's eye, the content and brand messaging needs to be engaging and is often only successful if the shopper watches the whole loop. Interactive screens were seen exclusively in department stores, and one display encouraged shoppers to interact with a pre-downloaded app.

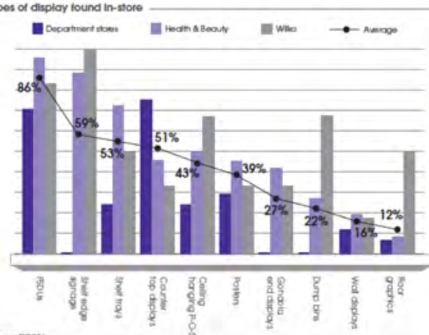
Gaining a full perspective

To support our in-store research, we also analysed over 300 displays to see how brands used them to best effect. We looked at the basics of popular promotional messages, the colour of displays and the use of text and fonts.

Our analysis showed that on nearly a third of displays there was no clear primary promotional message. A volume discount or multi-buy offer was the most popular promotion being seen most regularly in Boots. New products were marked as such and this message was seen in 10% of the displays we surveyed.

The messaging in department stores varied greatly from the other high street retailers, with the focus being on the product itself, that the product was new or that

Types of display found in-store



Source: POPAI

With so many promotional displays in-store on an often crowded shop floor,

44% of displays seen featured retailer branding

Source: POPAI

how do displays stand out? Interestingly, black was the most popular colour of display, featuring as the overriding colour in 20% of the displays we analysed. Pink was the next highest at 18%, followed by white at 15%.

Where text was used on displays the most popular colour combination for this was a black background with white text. Accent colours such as blue, pink, red and purple were also used with bright, bold and striking colour combinations to achieve stand-out. To reinforce the brand and tie in with wider advertising, the majority of displays featured the product's brand logo most often in a prominent positon at the top of displays and alongside retailer branding. Brand owner logos, such as Unilever, P&G or Bayer featured on less than a third of displays analysed.

Clear, concise messaging is a must for an effective display, but how do brands achieve this? The use of text on displays was quite traditional, featuring left to right in the vast majority of displays, with modern, plain sans serif typefaces chosen. Most displays featured two fonts, followed by just one font, and finally three or more.

Health and beauty as a sector relies on looking good, and if a picture paints a thousand words, this is never truer than on a display in this area. Clever use of imagery can help link the displays with wider advertising campaigns, inspiring shoppers by demonstrating tangible benefits and results. Nearly a third of displays we analysed featured aspirational or lifestyle imagery. Over a quarter used product imagery, with just under a quarter featuring both.

The shape of a display helped catch the shoppers' eye with a number featuring a super-sized product replica as a 3D element, and a few of the displays even being product-shaped themselves (factice). This is an effective way to bring the product to life and showcase an often physically small product.

Most popular colour combinations of background and text

1. Black and white
2. Blue and white
3. Pink and white
4. White and black
5. Pink and black

Source: POPAI

Falling stock?

Brands invest a lot in promotional displays through design and production costs, alongside the investment needed to secure space in-store. It is, therefore, essential that displays not only look their best but are also fully stocked to avoid any lost sales.

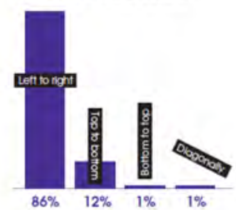
Stock levels of the displays we audited varied, with the majority being full or more than half-full. However, 13% were either half-empty or completely empty: a worrying finding for both brands and retailers when lost sales and the prominent position of the displays are taken into account.

Our storedits found around half of the stores visited to have out-of-stock items, with many retailers not clearly marking them as such. Superdrug was noted for its clear messaging over price tickets of out-of-stock items which said that more were on the way.

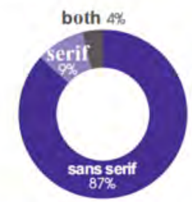
Making shopping a sensory experience

A number of sensory elements appeared in health and beauty displays in the stores audited. Light was used in over half of the stores, with lightboxes and LEDs used to highlight product and imagery. Smell naturally lent itself to the environment in

Most popular text directions



Featured font type



83% of displays featured imagery

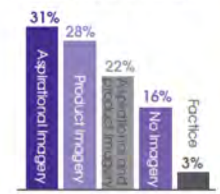
86% of displays featured the brand logo

Source: POPAI

1 in 5 displays featured three or more fonts

Source: POPAI

Imagery featured on displays



Source: POPAI

BRAND BODY LANGUAGE

Brands have always explored novel and unusual ways to communicate their values or message at key touchpoints. Often the desire to be impactful or different at a moment of truth is interpreted as being obviously discontinuous or breaking category norms. How can you engage with the shoppers if you're not noticed? You won't arrest them if you're being generic, goes the argument. However, there is a case for a more subtle approach, which implies a message rather than broadcasts it.

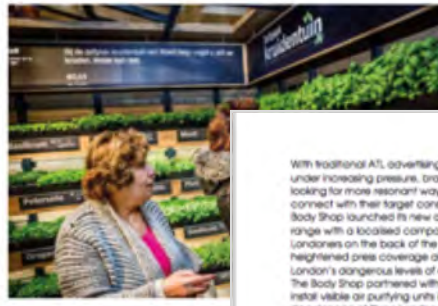
Take the customer on a short journey of suggestion, where they feel they've discovered – instead of being told – the message and that message will be better received and remembered. Subtle cues that hint at brand values, which the shopper gleans through intuition or a process, often have longer lasting value.

This development explores this approach, and many of the examples use quite conventional means to signal their message. This is a very physical trend, often involving packaging, P-O-P, and above-the-line and print advertising. It reminds us that even the basics can charm and delight the shopper. You don't always need artificial intelligence, robots or mobile technology.

That said, a case study which succinctly demonstrates the idea behind this trend – Lowe's exosuits – does use advanced technology.

The Lowe's exosuit is a wearable device that assists employees in heavy lifting. It passively stores energy and reduces injury. It's a highly obvious thing: you can clearly see the employee has a mechanical device strapped to them, robot-style. Not only does the suit perform a positive physical function, relieving the employee of the burden of heavy-lifting, it also clearly advertises the fact on behalf of the brand. The empowered employee is a walking embodiment of the values of Lowe's. In a time of the hard-pressed Uber driver, the negatives swirling around short-term contracted labour and the threats of automation, the exosuit shows how a company can combine technology and its people to create a human-centred solution and deliver results in-store.

Other brands are bringing prominent physical changes with subtly conveyed narratives to the shelf edge. Fresh herbs in supermarkets are not new. But Albert Heijn has explored an approach that both runs counter to conventional thinking and hints at values often ignored by the shopper. The fresh herb display in its Purmerend superstore (billed as the greenest supermarket in Europe) includes still-growing seedlings, marked by hand as 'don't cut me yet' and 'another two weeks to go'. Stock you can't buy is taking up valuable shelf space, but is illustrating the freshness of the herbs you can purchase, and the time it takes the plants to grow. The freshness values are truly made real in this living story.



Sometimes a brand can achieve more unique body language by partnering with another brand, in unexpected and surprising ways in-store. Rather than relying on the draw of a partner promotion or in-store offer, a charming, subtle example of first moment of truth comes from the collaboration between Kirin beverages and Pocky biscuits in Japan. The two brands' complementary products, though from different companies, literally kiss on shelf when cross-merchandised through linked narratives on the packaging. Not only can shelf stockers and customers manipulate the narrative in store, choosing whom should kiss whom, but how can shoppers buy one product without the appropriate partner to bring the story home?

With traditional ATL advertising coming under increasing pressure, brands are looking for more resonant ways to connect with their target consumers. The Body Shop launched its new anti-pollution range with a localised campaign for Londoners on the back of the recently heightened press coverage about London's dangerous levels of air pollution. The Body Shop partnered with Airlabs to install visible air purifying units into bus stop signage at three London sites. The Body Shop's creative approach to using 'traditional' physical advertising assets communicates their commitment to the environment in a refreshing and subtly impactful way. It certainly made the GDR researchers do a 'double-take' on walking past.

What many of these examples share is a willingness by the brand and designer to question whether the basic, often dismissed, aspects of a product cannot actually be a differentiated and meaningful communication touchpoint. Because these approaches use quite ordinary media – a box, the physical bottle or the shelf – the brand is required to be suggestive rather than obvious, but that actually is a positive. A message conveyed through the power of suggestion is often stronger and more memorable than the 'in your face' approach. Consumers are wise to the tools used to market at them. Being subtle, and beguiling your customers by embodying values in objects, sensorial stories and intuitive narratives may make for stronger connections, with longer term attachment.

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 emailed to POPAI members soon.

To find out more, contact **sophie@gdruk.com**. Follow GDR Creative Intelligence **@gdruk** on Twitter and sign up to the weekly newsletter, Strategic Inspiration for Retail: **eepurl.com/lgV95**


SHOPPER SEMINARS
FREE ATTENDANCE
FIVE PER YEAR
KEY TOPICS
- POPAI UPDATE
- GLOBAL RETAIL TRENDS
- INSIGHT INTO RECENT CAMPAIGNS

ANNUAL EVENTS

RETAIL MARKETING CONFERENCE

SHOPPER SUMMIT

MEMBER DISCOUNTS ON TICKETS

KEY TOPICS

- RECENT CAMPAIGNS
- TREND INSIGHTS

TECHNICAL EVENTS

IN-STORE INNOVATIONS

TECHNICAL TRAINING

KEY TOPICS

- DIGITAL PRINTING (HP EXPERIENCE CENTRE)
- AR, VR, 3D PRINTING
- HOLOGRAMS & LEDS
- E-PAPER, DIGITAL TICKETING

RECENT PRESENTERS

Beiersdorf

Boots

co op

DAIRY CREST

Irish Distillers Pernod Ricard

mamas & papas

O_2

pets at home

PHILIPS

sky

Unilever

vodafone

VOLVO

Yale®

EVENTS – SOME HIGHLIGHTS

2)CREATE COMMS THAT CUT THROUGH IN 3 SEC

Customers are bombarded by messages when shopping, this causes stress and confusion, and ultimately lost revenue.

Today only 15% of store traffic might notice a piece of POS, there are comms planning and design principles that can help use get maximum cut through and conversion.

1. To get cut through in 3 secs, the communications must be super simple. So simple a 4 year old can understand.
2. Visuals must support the copy and reinforce the message. Working together you will get greater cut through.
3. Every comms touchpoint must work in isolation of another, but when grouped or viewed together we achieve maximum cut through.
4. **Work with your merchandising team, products and their packaging should be considered in any in store comms brief to achieve maximum impact.**

B&Q

EVENTS – SOME HIGHLIGHTS

1) Provide shoppers choice for every Socialising Occasion, at the fixture
2) Develop shopper engagement/inspiration and time spent in store

Alcohol is the **#no1 choice** for the Socialising Occasion (33%)

51% of UK consumers now regularly moderate alcohol intake

Soft Drinks shoppers have **BIGGER** baskets, **HIGHER SPEND** and **MORE FREQUENT** visits

THE LONDON ESSENCE CO.

Adjacency is critical to managing flow – traffic comes from **mainstream adult & alcohol**

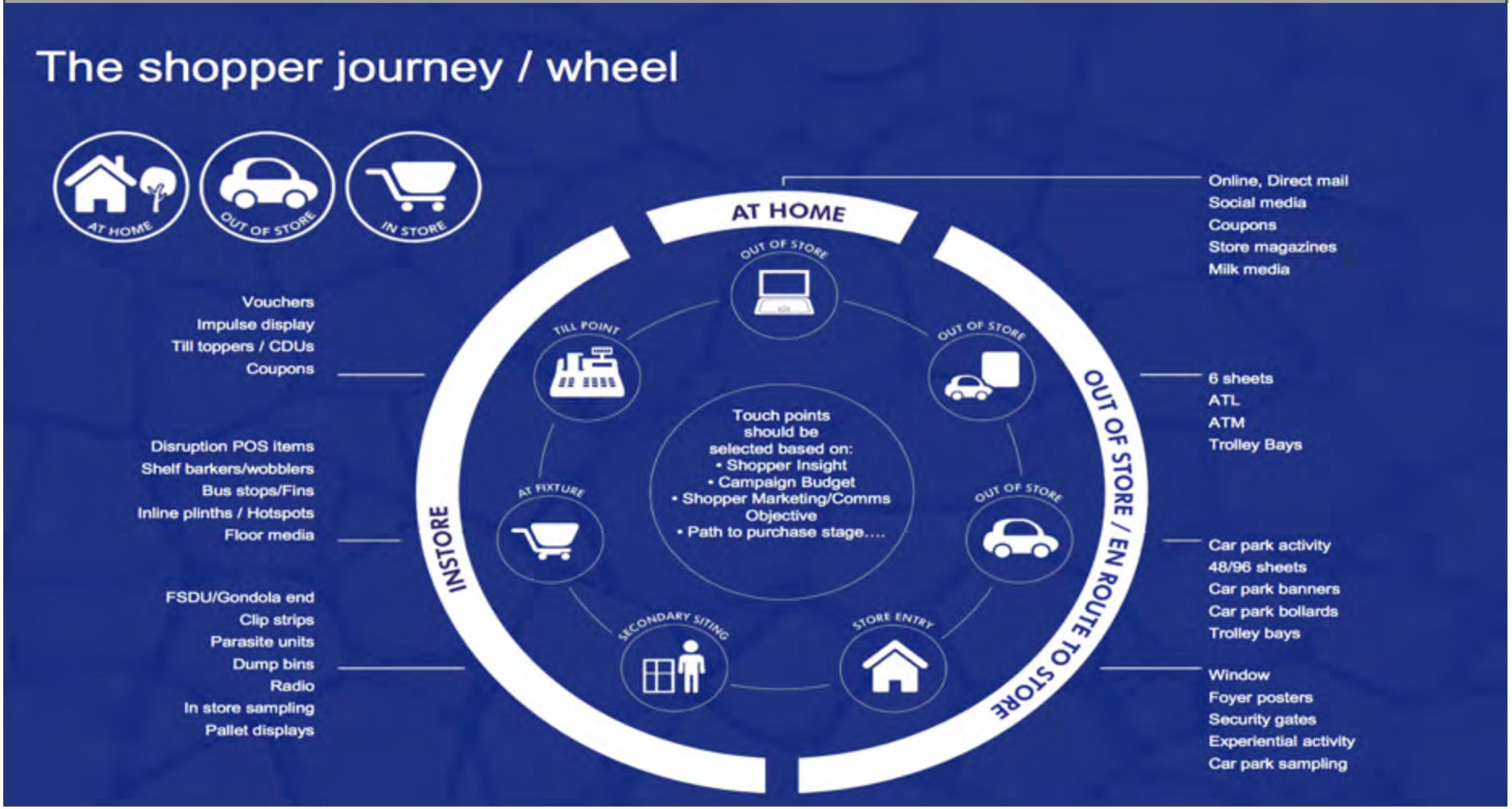
Education at fixture is vital for shoppers to understand **when & how** to use the product

Getting **different buyers and category teams** together is a challenge

EVENTS – SOME HIGHLIGHTS

EVENTS – SOME HIGHLIGHTS

EVENTS – SOME HIGHLIGHTS



EVENTS – SOME HIGHLIGHTS

EVENTS – SOME HIGHLIGHTS

POPAI

PART OF THE shop! GLOBAL NETWORK

popai.co.uk

AWARDS

- HIGHLY PRIZED
- EXCLUSIVE NETWORKING
- DISCOUNTED ENTRY FEES
- DISCOUNTED TABLE BOOKINGS

AWARD JUDGES

PROFILE RAISING

- USE OF POPAI LOGO
- ONLINE MEMBER DIRECTORY
- NETWORKING OPPORTUNITES AT EVENTS
- ADVERTISING & SPONSORSHIP OPPORTUNITIES
- DISCOUNTS ON STAND BOOKINGS AT RETAIL DESIGN EXPO

NETWORKING

SHARE & OVERCOME COMMON OBSTACLES

FREQUENT OPPORTUNITES AT EVENTS

PEERS, UPSTREAM & DOWNSTREAM

EDUCATION & TRAINING

eCOURSES

10 eCOURSES COVERING P-O-P, THE SHOPPER & EFFECTIVENESS

MEMBERS RECEIVE 2 FREE eCOURSES

COMPANY-WIDE UNLIMITED ACCESS PACKAGES AVAILABLE

POPAI ACCREDITED LEARNING

SHOPPER MARKETING FOUNDATION COURSE

BESPOKE TRAINING SOLUTIONS

RESEARCH & CONSULTANCY

SHOPPER BEHAVIOUR & RESPONSE

DISPLAY EFFECTIVENESS

IN-STORE AUDITS

DISPLAY PORTFOLIOS CONSULTANCY

MARKET REPORTS

DIGITAL SIGNAGE CONSULTANCY…

DIGITAL SIGNAGE CONSULTANCY

MANAGEMENT & SUPPORT

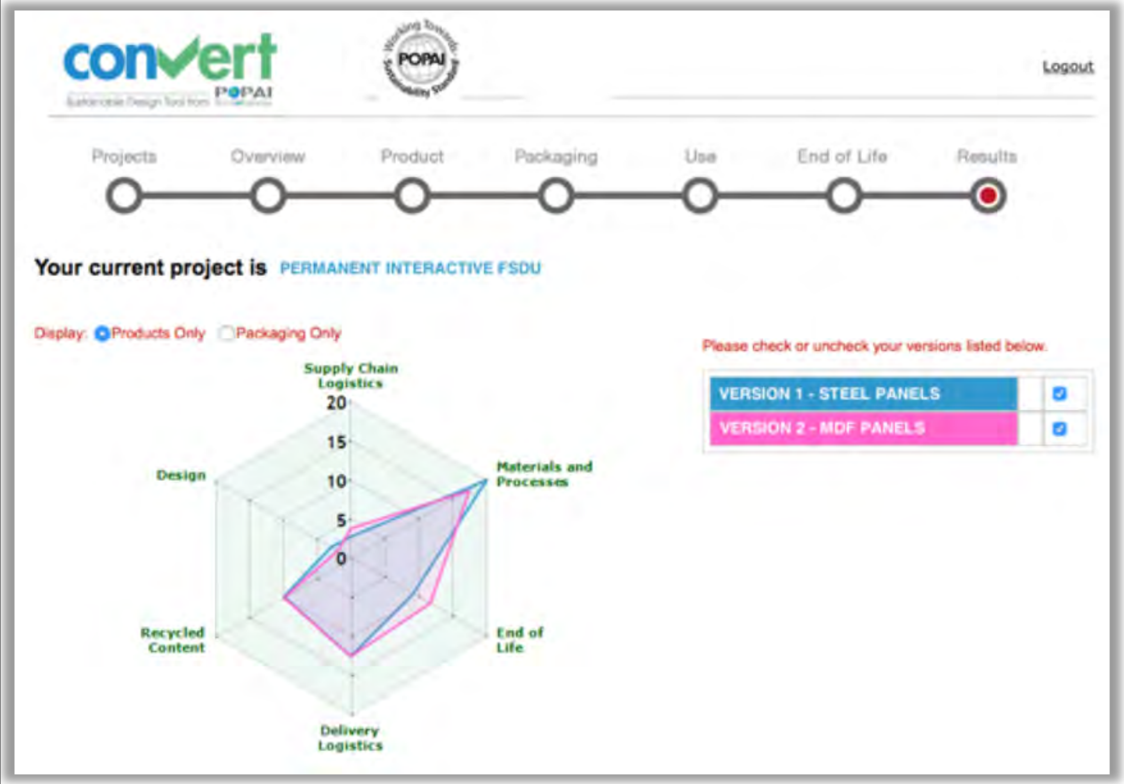
- FEASABILITY / ASSESMENT
- SUPPLIER SELECTION
- BUDGET MANAGEMENT
- TRAINING
- PROJECT MANAGEMENT

HARDWARE & CONTENT

- SCREENS
- MEDIA PLAYERS
- CONTENT STRATEGY
- CONTENT TACTICS
- CONTENT DELIVERY

SUSTAINABILITY

FREE ACCESS TO SUSTAINABILITY TOOLS



VERSION SCORE	57.29	57.34
TITLE	**VERSION 1**	**VERSION 2**
SUPPLY CHAIN LOGISTICS	2.710	3.750
MATERIALS AND PROCESSES	20.000	17.400
END OF LIFE	9.160	11.670
DELIVERY LOGISTICS	12.520	12.520
RECYCLED CONTENT	9.900	10.000
DESIGN	3.000	2.000
WEIGHTS	**VERSION 1**	**VERSION 2**
PRODUCT WEIGHT (KG)	5.950	2.250
VOLUMES	**VERSION 1**	**VERSION 2**
UNIT PRODUCT VOLUME (CM3)	1,000.000	450,000.000
PRODUCT CARBON	**VERSION 1**	**VERSION 2**
TOTAL CARBON EMBEDDED (CO2E) IN EACH PRODUCT (KG)	457.484	3.160
TOTAL CARBON FROM TRANSPORT OF EACH PRODUCT (KG)	5.710	2.704
TOTAL CARBON (CO2) FROM PRODUCT USE PER YEAR (KG)	0.000	0.000
WATER FOOTPRINT OF MATERIALS	**VERSION 1**	**VERSION 2**
WATER EMBODIED IN PRODUCT MATERIALS (PER USE)	88.400	12.503
DISPOSAL OF PRODUCT	**VERSION 1**	**VERSION 2**
AMOUNT OF MATERIAL RECYCLED (%)	58.824	55.556
AMOUNT OF MATERIAL LANDFILLED (%)	31.092	44.444
AMOUNT OF MATERIAL INCINERATED (%)	0.000	0.000
TOTAL CARBON (CO2E) FROM DISPOSAL OF EACH PRODUCT (KG)	0.341	0.060
TOTAL CARBON FOOTPRINT	**VERSION 1**	**VERSION 2**
EXPECTED LIFE OF PRODUCT (MONTHS)	3.000	6.000
TOTAL LIFECYCLE CARBON (CO2) PER PRODUCT (KG)	463.534	5.924

MEMBER COMMUNICATIONS

POPAI WEEKLY

QUARTERLY LETTER

SOCIAL MEDIA

FINAL THOUGHT…