

in-store insights

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ISSUE 13. SPRING 2013 | £4.99 | DEDICATED TO RETAIL MARKETING

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DIALLED IN – MAKING GOOD CALLS IN-STORE

SECTOR REPORT |

We look at how the latest trends in mobile retailing could signal the way ahead for others keen to make stronger shopper connections.

SPECIAL REPORT |

We join the attendees, speakers and industry watchers to give you a run down of the ideas on display at the 2013 Retail Marketing Conference.

INTERVIEW |

Harrods' Guy Cheston highlights how the famous retailer is blending tradition and technology to inspire the next generation of shoppers.

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EDITOR'S WELCOME:

So the year started in much the same way as 2012 began: economic crisis, some very wobbly financial results and an expanding retail vacuum on our high streets. Thankfully, the following pages go to show that it doesn't always require deep pockets to encourage shoppers to see the in-store experience in a positive (more attractive) light – just a bit of imagination. As speakers at POPAI's annual Retail Marketing Conference highlighted (see page 11), the industry should abandon overly complex or unnecessarily costly executions that fail to hang together, in favour of more honest and straightforward approaches to shopper engagement. For those of you looking for new ideas, we highlight what the mobile retailing sector is doing to bring a bit of inspiration and fun back to its stores (see page 7). We explore too how Harrods, perhaps the world's most famous retailer of all, is successfully balancing modern in-store demands with long-standing tradition in our interview with its media director, Guy Cheston – turn to page 20.

Happy reading!

Marc Baker
Editor

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Cover Photograph:
Virgin Media digital wall
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LONG LIVE THE iSTREET

– Showrooming

Preface

With so much coverage and talk about the future of retail being online, retailers could be forgiven for being wary of the latest trend for Showrooming. But whilst they may be shopping their mobiles at the same time as shopping in-store, the idea that they are close to abandoning bricks-and-mortar stores simply in search of the best price couldn't be further from the truth.

Traditional retailers are learning a very fast lesson, that if they want to survive on the high street they must not only do more, they must do something different. Technology is rapidly reshaping the high street and leading the way is the phenomenon dubbed "Showrooming", in which shoppers visit their local store, check out a product and then shop around online and through their mobile devices for the product they want at a cheaper price.

"Increasingly shoppers want to get their hands on products in-store, only to scan the bar code using their smart phone to instantly find the best price – whether that's on the high street or online," says Kris Munt, director of business development at arken P-O-P.

A report by ForeSee, a leading customer experience analytics firm found that 40 per cent of the mobile users reported using their mobile phone while in a retail store. Interestingly though, it isn't always to check price comparison sites or competitors – it appears many shoppers are using mobiles to check that company's own website. As ForeSee's senior director of mobile, media and entertainment, Eric Feinberg points out, Showrooming isn't necessarily a bad thing. *"Stores have an opportunity to keep their shoppers by providing a better mobile experience for them, but to do that they must understand the needs of their own multichannel shopper."* In the



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opinion of Feinberg, mobile is drastically changing the way today's multichannel, multi-device shoppers are viewing and engaging with retailers, and marketers can ill-afford to stand idle and watch the opportunity go by. *"If a mobile or store experience doesn't meet expectations, shoppers will go somewhere else."*

It is a view shared by Aimia in their recent report titled *"Through the looking glass – building relationships with retail showroomers"* which provides a glimpse into the future of retail – one that embraces showroomers. In the report it observes *"Showroomers are more likely to participate in loyalty programs, will be more willing to trade personal details for rewards, and are more interested in mobile commerce. Retailers should take advantage of these behaviours to transform showroomers to become loyal - and paying - shoppers."*

In a recent interview, Brent Hoberman, the co-founder of lastminute.com went a step further by voicing his view that high street outlets will essentially become advertising for brands, allowing shoppers to shop online in-store and turning big shops into sort of brand cathedrals.

Although smartphones can pose a big problem for retailers when it comes to Showrooming, the solution isn't necessarily to stop them from using their phones in-store. Instead it's about building loyalty so that they buy from your store regardless of cheaper alternatives. *"It's about using these devices and technologies in the right ways to meet changing behaviours and expectations, and to create a better shopping experience,"* explains Sheena Patel of GDR Creative Intelligence.

In many ways the concept of Showrooming should be seen as a retail state of mind that will allow retailers, brands and store teams to free themselves from the traditional confines of securing the sale, and instead able to concentrate on securing

engagement. For too long, many retailers have focused their attention on securing shopper spend, rather than demonstrating how their brand can add value, enrich experiences and bring people together. Great retail marketing should always be about the benefits of the retail experience as well as the features of product in-store. Concentrating solely on the latter simply reduces everything to a commodity purchase decision, and that's where online thrives.

You only have to look at the success of Apple and its fully immersive retail experience that lets shoppers explore, play, or download, with knowledgeable staff on hand to provide valuable product insight and information that gives features meaning. On the back of this kind of experience retail teams can begin to build engaging conversations with shoppers and add even greater value to the purchase process.

"Whilst the last step in the path to purchase may be taken online from the comfort of shoppers' homes, in-store still has a huge role to play in influencing where shoppers make that final purchase," says Munt. *"An enjoyable and memorable shopping experience, together with a clear understanding of added value services, will mean that many more future purchase decisions may go in the direction of high street retailers' online stores, instead of discount pureplay e-retailers."*

Yes, shoppers will research extensively online before visiting a store and compare prices. But there remains a burning desire to physically engage with the retail space – to see and touch products. *"Shoppers still want to shop,"* explains Munt.

So, far from the growth of mobile and online shopping signalling the death of the high street, shoppers will it seems continue to leave the house for shopping inspiration. And as an industry, we have a collective responsibility to ensure we deliver that for them, every time they step in-store – reinforcing their experience of the brand as they do – even if, ultimately, they complete the purchase after they leave.

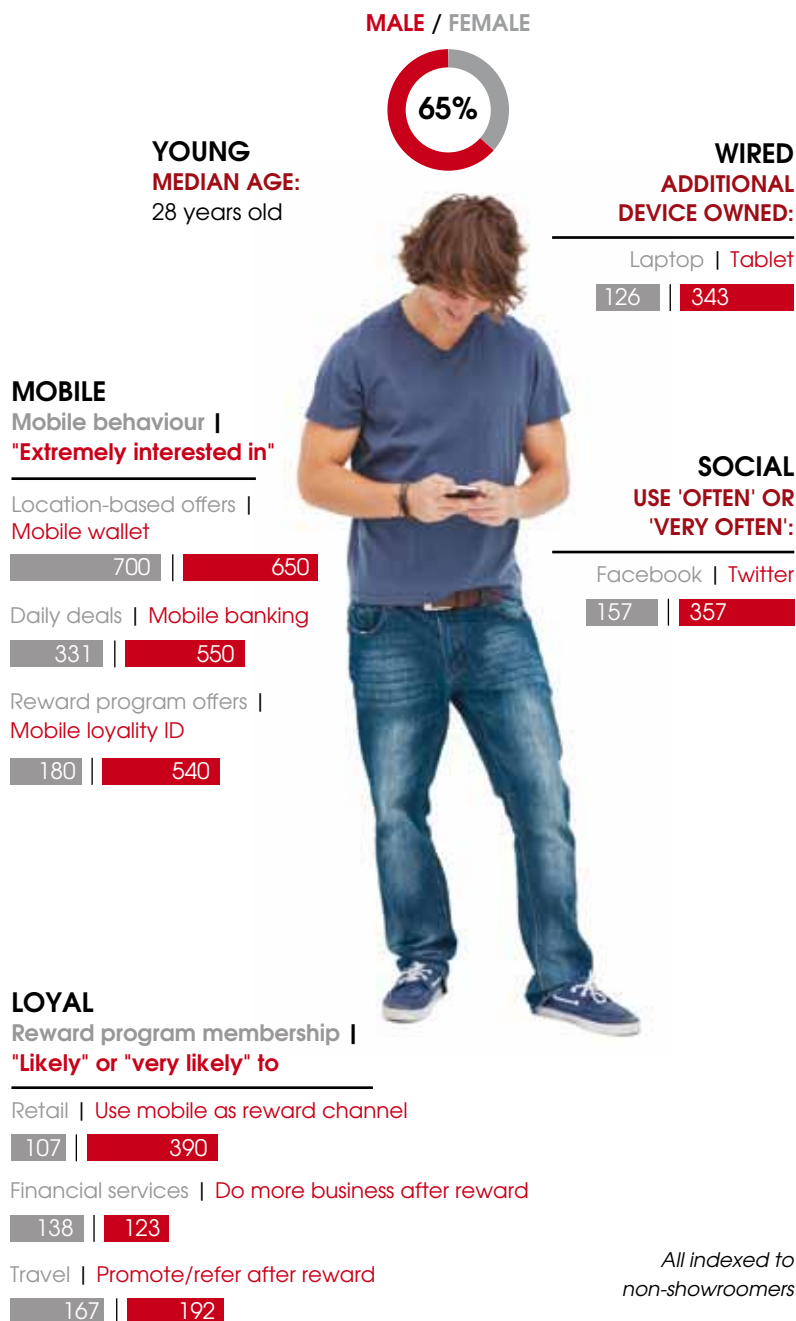


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- 01 Showrooming is a trend on the rise
- 02 IKEA's well-established 'showroom' retail experience

The Showroomer

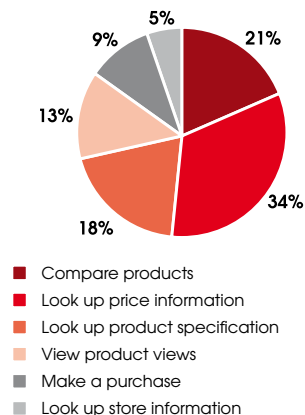
Aimia's Millennial Loyalty Survey reveals a detailed look at the typical retail showroomer in the UK. Here's what they found. The typical showroomer is male, owns at least two devices and is highly active in social media. And far from being retail's worst nightmare, UK showroomers are seven times more likely to respond to location-based mobile offers than a non-showroomer.



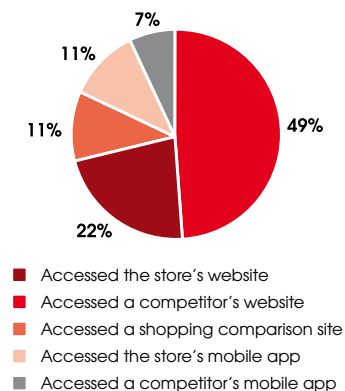
Measuring Mobile provides critical insight

40% of mobile users reported using their mobile phone while in a retail store. Many did so to check that company's own website, but less satisfied mobile shoppers may be turning to the competition. Make showrooming work for you by providing a top-notch mobile experience.

HOW UK SHOPPERS ARE USING MOBILE



HOW UK SHOPPERS USE MOBILE DEVICES IN RETAIL STORES



How did you use your mobile phone whilst in store?	% of Respondents
I accessed the store's website	74%
I accessed a competitor's website	34%
I accessed a shopping comparison website	16%
I accessed the store's shopping app	16%
I accessed a competitor's shopping app	8%

The ForeSee Mobile Satisfaction Index 2013 © ForeSee

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CALL TO ACTION

– Mobile Retailing

Preface

Today, mobile phones are more important than ever – an essential tool for modern living. But whilst much of the attention recently has been focused on advances in mobile marketing, approaches by retail providers to promoting mobile phones in-store are changing rapidly too.

The impact of mobile marketing on the path to purchase remains a key focus for many retail marketers. But the reality is that global sales of mobile phones actually fell in 2012 compared with the previous year, according to a report from research company Gartner. It said 1.75 billion handsets had been bought, marking a 1.7% decline. So, whilst those outside the mobile sector concentrate on how to engage shoppers through their handheld devices, marketers at leading mobile phone retailers are focusing on creating in-store experiences that better reflect the growing trend for buying into the benefits of big-ticket smartphone connectivity.

Promoting mobile phones in-store is no longer just about dummy handsets and the formulaic use of digital window screens. Retailers such as EE, with the backing of its £multi-million Hollywood endorsed TV campaign is promoting the benefits that true mobile connectivity brings to our lives. Yet despite its recent rebrand of Orange and T-Mobile stores to the EE fascia and new P-O-P communication in-store, dummy handsets are still clearly visible. That may sound at odds with the above-the-line messaging, but the rationale



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behind their continued use is driven by the reality of retail fraud that still exists in stores up and down the country.

"Ideally, we would all like to see live handsets we can play with," says Phil Holloway, design director at H Squared. "From a retailer and shopper perspective it's exactly what is needed to enable browsers to see, touch and use a product before purchase. But these are high value products and the cost of replacement can run into significant sums, which either the retailer or the manufacturer would have to cover. Neither wants to cover that cost."

Ironically, the small, lightweight and mobile nature of mobile phones which are key to their appeal also make them easy to steal and, because they are highly desirable, easy to sell on.

Some retailers, such as Apple have managed to achieve the utopian store thanks to high-density staff and an in-store environment that delivers an experience rather than a retail market place. In other mobile retailers staffing levels are much lower and so the opportunities for opportunistic theft are much greater.

One company making strides in overcoming this challenge is Sector Design with its innovative security product Prosect™. "Our work with clients is invariably around the need to enable shoppers to experience products live in-store," says Patrick Bell, director of the Leicestershire-based retail design agency. "These are big-ticket items requiring a considered path to purchase, it is essential that shoppers have the opportunity to trial products and compare them to others. Pictures and words alone are not adequate."

With this emergent, common issue at the heart of many retail briefs for technology-based brands and retailers, Prosect™ is finding favour in trials throughout Europe. And although originally designed as a Loss Prevention solution for the mobile phone industry, it is now also being adapted and deployed in the mobile computing category and for the computer games category.

The key advantage of such systems is that it provides physical security and retention, but does not interfere with the prospective purchaser's 'device in hand' trialling of the live device. What's more, it is designed to incorporate a charging device



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within the solution, ensuring that demonstration devices remain powered and live.

Seemingly as ever though, there is one familiar brand name that is flying in the face of convention. Located in London's Westfield Shopping Centre, Virgin Media's new 'Our house' store concept places interactive digital signage at the forefront of the retail experience. Its main feature is a giant interactive virtual product wall, rather than placing the focus on physical handsets. The store utilises eight different digital signage applications created and developed by Acquire Digital, with kinetic gesture controlled screens and interactive panels also allowing the shopper to explore product in a truly unique way. *"One of the main requirements of the brief was to create an opportunity for shoppers to play, browse, watch and interact,"* says Mat Bartram, head of design at Acquire.

Controlled by touch, shoppers can swipe through mobile ranges selecting individual phones for a closer look at features and pricing. Also impressive is the way the store utilises digital signage to aid tariff selection. An interactive touch screen device hosted on a 55-inch screen, the tariff selector intuitively selects the best tariffs based on information supplied by the shopper simply by moving sliding buttons, and uses an algorithm to determine the best tariff for them.

"We're in the business of connecting and entertaining people, so we wanted to inject fun into the shopping experience too," says Paul Williams, Virgin Media's retail director. *"It's been a fantastic project to work on and we want to take elements from here across all stores in the future."*

Marketers in the sector are also embracing the latest developments in mobile marketing to communicate with shoppers through their existing handsets, in order to encourage more sustained brand engagement, promote new product information and special offers. *"The retailer and brands can use shopper's own mobile devices to help them shop in a myriad of ways,"* explains Holloway, *"especially when it comes to allowing access to reviews, recommendations and interaction with peers. The power of social media and conversation between peers should not be underestimated and it can be delivered to shoppers at any moment during their retail experience."*

It's an approach that retailer O2 has been keenly exploiting in-store in recent months. Its latest integrated campaign saw the brand's retail windows given over to high street shoppers who were asked to tweet messages of love and affection in the run up to Valentine's Day. The campaign followed O2's Christmas tweet campaign which saw 4,000 tweets displayed across the brand's retail network.

Despite these innovative approaches, the sector has traditionally remained largely wedded to the use of digital poster screens in windows. But new approaches are starting to creep in here too. Vodafone's digital store window campaign for Winter 2012 is a perfect example of more imaginative, engaging thinking being applied to this space.

The digital creative found a fresh way to bring the brand message to life. It featured the brand's familiar Freebee characters, Mike and Jack, throwing snowballs which hit the window to reveal Vodafone's seasonal offers such as Pay As You Go handset – a key driver of sales at that time of year. A heightened flagship store execution included a full 3D set to bring the campaign to life even further and was supported by walls of seamless LED screens in the windows, adding further impact to the animation. *"In-store remains one of the most influential points in the purchase cycle for mobile phone brands,"* says Marcus Sandwith, managing director at marketing agency Haygarth who were responsible for creating the campaign,

"Digital media will always be an ideal fit with mobile retailing, but the content must be adapted to suit the shopper," adds Holloway. *"This retail environment in particular needs content specifically designed for it – short, snappy and with a direct call to action." The message is clear: retailers must keep investing in their attempts to dial in to a more tailored retail experience. "Without an environment that educates and inspires shoppers, there is little reason for them not to simply run a price comparison and purchase direct,"* says Holloway.

-
- 01 Digital integration with traditional permanent P-O-P is becoming commonplace
 - 02 Vodafone's Christmas digital window campaign
 - 03 O2 in-store Valentine's Day tweet campaign
 - 04 Retailer is championing 'connectivity'
 - 05 Virgin Media's 'Our House' places digital at its heart
 - 06 Prosect™ is helping to guard against handset theft

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COUNTER CULTURE

– Retail Marketing Conference 2013

Preface

Each year there are two must-attend events in the retail marketing calendar. Marketing Week Live is still a few months away but with a mix of leading marketers, trend analysts, agency creatives, research experts and a journalist, this year's annual retail marketing conference proved a lively setting for debate.

It's 09:15 in the morning and retailers, marketers, hordes of P-O-P agencies and producers are all jostling for a seat at the most attended conference in the industry's calendar. Martin Kingdon, POPAI UK & Ireland's director general is about to introduce the first speaker at the organisation's 2013 Retail Marketing Conference.

Despite the downbeat economic climate hanging over the UK and the snowy conditions that threatened to hamper the movements of attendees, this year's Retail Marketing Conference gave visitors a warm glow with another solid offering from some of the P-O-P industry's brightest minds.

While the latest retail casualties were on the mind of many (HMV, Blockbuster and Jessops were three big names to collapse into administration in just a few short weeks in the run up to the conference), there appeared to be a sense of cautious optimism in the air.

Billed as P-O-P's biggest conference of the year and a leading forum on the practical issues of in-store marketing delivery, the event features a number of high calibre speakers including the likes of Marks & Spencer, Premier Foods, Tesco and Unilever.



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Over the years, the one-day conference has built a strong reputation as an inspirational meeting of retail marketing minds and the insight gained from both the speakers and the other delegates is invaluable.

This year's event attracts a record number of delegates, with 120 attendees – reinforcing the fact that in challenging economic times for retailing, sharing knowledge and insight into best practice has never been more relevant. "Shoppers are

"Shoppers are becoming much more forensic in their search for value – in terms of price but also value through inspiration"

becoming much more forensic in their search for value – in terms of price but also value through inspiration," Amy Lydiate, shopper marketing controller at Premier Foods explains to the assembled audience. *"It is our job as marketers, to*



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ensure we provide a shopping experience that is truly aligned to their needs."

The event encompasses everything from a look at the new in-store format developments within Marks & Spencer's Westfield Stratford City store, the approach being taken by travel retailer TUI to reinvigorate its retail environment, together with two lively panel session debates covering the future of in-store, and shopper insight best practice.

"There is no place for complacency. Even the best innovators must ensure the latest thinking remains firmly connected to the needs of the shopper."

The retail trends panel session in particular sees a rousing discussion, with Retail Week's group store editor John Ryan sending out a wake-up call to some traditional retailers in the UK. Ryan tends not to mince his words. Free from the constraints of employer or client affiliations, he is frank when it comes to weighing in with his assessment of the value that some shopping experiences deliver to shoppers on the high street. He delivers a blast of indignation and impunity in the direction of some retailers over their lacklustre attitude to providing inspiring shopper engagement. He does however applaud the efforts of new UK entrants from the US, such as Lululemon, for their human, shopper-centric approach.



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Later in the day, Chris Sampson from Marks & Spencer steps up to reinforce this view, highlighting the need for retail marketers to appeal to all the senses whilst also identifying solutions that can fit inline with existing fixturing to maximise the value of capital investment. The consensus seems to be that when times are tough, get smart.

The list of great speakers also includes Unilever's Nick Widdowson who is on hand to discuss the makeover of the Dove Spa shopping experience – highlighting the need for retail marketers



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to find new ways of making brands more accessible to shoppers in today's multichannel environment. Other experts taking part in the conference included Ben Hovanessian, head of in-store marketing at supermarket giant Tesco, and Adrian Green, head of channel marketing with Samsung.

The overriding message from many of this year's speakers is that the UK high street as an institution must evolve – the reason people are entering shops and the way they are interacting with them is changing and diversifying, and retail marketers face new and

exciting challenges to successfully adapt to the brave new world that is the modern shopping experience.

"In a changing industry that is under pressure in difficult economic times, it is more important than ever to stay abreast of developments," says POPAI UK & Ireland director general, Martin Kingdon. "There is no place for complacency. Even the best innovators must ensure the latest thinking remains firmly connected to the needs of the shopper."

Bringing the conference to a close is a presentation on the cult and evolution of pop-up retail from Sheena Patel, features editor with trend research consultancy GDR Creative Intelligence.

"The conference really hit home with a lot of people in showcasing how the store environment is evolving," says Kingdon. "It has been a rousing success, in terms of the quality of the speakers, the quality of the presentations, and the attendance. Everyone has gone away feeling energised, well-informed, and inspired."

Q&A

Panel Session – Retail Trends



John Ryan,
group store editor,
Retail Week



Nicky Herbert, senior
innovation researcher,
GDR Creative
Intelligence



Trevor Harvey,
director of planning,
Saatchi & Saatchi X

Is the High Street, as we know it, dead?

Ryan: I think smaller, fewer, better is likely to be the way ahead. There are still too many shops but the bad elements are disappearing from our High Street. Success will be about making shopper engagement work, and you don't have to spend a lot of money to make it work. What will emerge from this landscape will be better shops because to survive they will have to be better. It is fairly apparent that there will be more casualties to come before we are through.

Herbert: Online is clearly having an impact. But IKEA is an interesting example of the real state of play. Currently, only 2 per cent of its sales are through the Internet, which means a huge 98 per cent of transactions occur in the physical store space. It's all about offering a point of difference, creating value in the store environment and giving shoppers compelling reasons to come to the store. The retailers of the future will have to offer an extra level of service.

Harvey: The High Street is dead but only in as much as a caterpillar is dead before it transforms – we know it as a different entity afterwards. I think the High Street as an institution has had its time. There really is no need in an omnichannel society to have one particular piece of real estate that people need to go to for all their shopping needs. So, in many ways it's changing more than it's dead. What we're looking for in-store when we go shopping is some sort of emotional engagement. Shopping has moved on from being very functional into an era where we have more information, more knowledge and therefore more choice. What shoppers are looking for now is an emotional value that connects with the brand. The High Street needs to adapt and keep up with us as shoppers.



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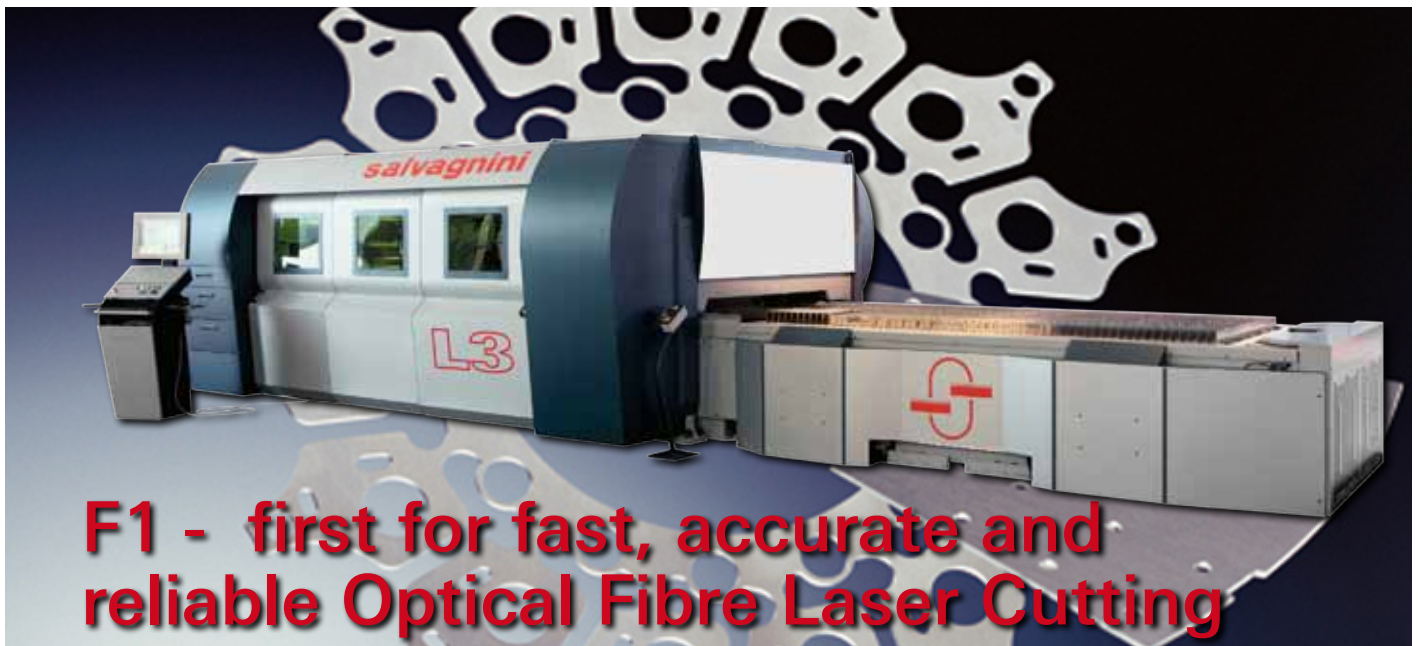
07



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- 01 M&S deli counter within Stratford City store
- 02 London's Commonwealth Club hosted lively debate
- 03 Hordes of P-O-P professionals travelled to Embankment
- 04 M&S new Food Hall concept at Westfield Stratford City

- 05 TUI's Brighton store delivers a more integrated and refined retail experience
- 06 Premier Foods Ambrosia campaign adds value through inspiration
- 07 US retailer Lululemon hosts yoga classes in its stores
- 08 Dove Spa has undergone a revamp on the high street



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READY, SET, GO

– POPAI Awards

Preface

Preparations are underway for this year's POPAI Awards with the call for entries now open. We look at the path to success and what lies ahead for companies targeting the top prize in 2013.

Ever since the POPAI Awards launched in 2007, it has championed clarity of thought and a progressive attitude when it comes to the problems and possibilities of delivering excellence in retail marketing. The following "How to" pages are, we hope, a guiding light and will prove gently inspirational to all those who are considering entry into this year's Awards. We'll get the thoughts of past judges on the standard to beat; we'll show you how to give your award submission the best chance of success; we'll even hear a few words from the event's new corporate sponsor Mood as they step into the limelight for the first time on the reasons behind their decision. Our aim? To make you look afresh at the Awards entry process and to give you the best possible chance of scooping Gold. It's time to start thinking POPAI Awards 2013. It's time to get a move on.



How to... Win over the judges



No one is better placed to offer valuable advice on what makes a winning entry than the people at the sharp end – precisely the kind of individual that is long-standing judge Nick Widdowson, merchandising manager at Unilever, who gives the benefit of his extensive experience here. *"The 2012 Awards saw some of the highest quality P-O-P ever – an upward trend for sure. I'm looking forward to seeing more innovation and creative designs during this year's judging day."*



Top three tips

01 Think objectively

Many of the final judging decisions are based on how well the P-O-P met the marketing objectives it was tasked with, as well as how well the creative design remains true to the brand.

02 Do the maths

A display may look great, but for judges it's all about results which maybe in terms of financial performance or meeting other objectives. Details on sales uplift and ROI measurement speak volumes.

03 Be engaging

Store manager and shopper feedback on the in-store performance of P-O-P is also viewed as a true measure of success. In other words, did it change behaviour and encourage brand engagement.

How to...

Take the perfect image

Good quality photographs and especially video of an entry in-store really helps to bring the impact of a display to life and helps the judging process enormously. Despite the standard of entries into the POPAI Awards being so high, it's still striking how many entrants don't prepare their supporting photography properly and therefore lose out when it comes to the judging process. POPAI UK & Ireland marketing manager Lucy Bartram believes that the quality of photography has a direct impact on the chances of success. *"Over the years, we have seen so many potentially award winning entries that have been compromised by poor quality photographs,"* she says. *"We set a very clear definition of success and imagery is central to that. Companies have to embrace the importance of the supporting visual evidence they submit."* At least one photograph must be of the display in-store (to a resolution of at least 300dpi) to help the judges evaluate the display's use of retail or other space and see it in the context of its environment.



Top three tips

01 Hit the streets

Submitting a great case study doesn't happen overnight. The advice to any company considering entering the POPAI Awards 2013 is to take photographs and videos of display in-store at the earliest opportunity.

02 Get in the zone

Entries must include a minimum of three and a maximum of five hi-resolution jpeg photographs (no more than 2mb each) per entry

03 Photography is king

Visuals are not acceptable as part of submissions and will not be considered by the judges unless they provide technical detail not evident from the photograph.



How to...

Be a category champion

With so many categories to choose from, shortlisting which one to enter can be a difficult task. Whether you choose to concentrate on just one category or decide on a more aggressive approach in a bid to increase your chances of success by entering submissions into multiple categories, analysing the category choices is the first step to beginning the entry process. There are 18 categories in the main competition covering all aspects of the P-O-P market. The Awards also recognise the most innovative displays and those with the best environmental credentials. To be considered for an award, entries must include P-O-P display and in-store communication produced and placed between 1 March 2012 and 1 April 2013. The pinnacle of the competition is the Display of the Year Award given to both the best temporary entry and the best permanent entry from all categories, except Short Run and Flagship categories.



Top three tips

01 Talk amongst yourselves

Communicate internally and get a range of people's views on the merits and shortcomings of potential shortlisted projects for entry.

02 Convince yourself

You've got to have belief in your entry and feel that it has a genuine chance of winning, rather than simply playing a numbers game.

03 Get ready to spend

Put your money where your mouth is. Entering into the POPAI Awards is an investment that can pay rich dividends.



How to... Show your support



MOOD:
Claude Nahon,
president of Mood
Media Europe.

Deadline driven

The deadline for entries to the POPAI Awards 2013 is Friday 3 May 2013, with an extended deadline of 17 May 2013 if required – although additional fees may be incurred. If you have any questions about award entries please contact the POPAI Office on 01455 271856 or info@popai.co.uk

To enter, visit www.popai.co.uk/awards

2013 sees a new name take over the mantle as corporate sponsor of the POPAI Awards with sensorial in-store marketing specialists Mood replacing long-standing headline sponsors Momentum Instore. Mood has been an enthusiastic supporter of the POPAI Awards for a number of years. "We believe that POPAI truly has its finger on the pulse of the retail industry," says Claude Nahon, president of Mood Media Europe. "The decisions made by shoppers at the point of purchase are crucial to our business and Mood values partnerships like this, which ensure that we have the best information to create the ideal solutions to connect brands with their customers. The awards provide an unparalleled opportunity to showcase global excellence in the industry. It's an honour to win a POPAI award and the winners truly represent the best in the industry."

Speaking at the unveiling of Mood as corporate sponsor Martin Kingdon, director general of POPAI UK & Ireland, added, "We're delighted to confirm Mood as our new corporate sponsor and are sure they will bring great new ideas to the table to ensure the 2013 awards are the best yet."

Celebrating success



The awards ceremony will be held in London on 1st October 2013 at the Hilton Park Lane Hotel, 22 Park Lane, London, W1K 1BE. The night will be hosted by a top celebrity. Previous hosts have included Bill Turnbull, Hugh Dennis, Paul Ross and Frankie Boyle. The evening will begin with a champagne reception for informal networking followed by a three-course dinner, the awards ceremony and dancing.

How to... Judge the winners

Entries will once again be judged by a distinguished panel of industry professionals. The first round of judging will be done on-line with judges reviewing photographs/videos and case studies against the set criteria. Judges will then meet for a day to review and discuss each category and decide upon the final winning displays. Details of which companies have designed, manufactured or submitted entries are not released to judges.

Entries for the main competition will be judged against the following criteria

- Marketing objectives and strategies
- Innovation
- Quality of the case history
- Design
- Construction
- Creativity

- Use of retail space
- Branding
- Communicative value
- Ability to drive sales or meet the objectives set by the client in the brief
- Any other factor the judges determine that makes the display stand out against others in the same category

Entries for the Innovation Award will be judged on their creative use of new design, technology or materials or innovative use of existing techniques or any other factor that shows innovation against current display practice.

Entries into the Sustainability Award will be judged on how their design, manufacture and execution cause the minimum impact on the environment.



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PASS APPEAL

– Sustainability

Preface

Those companies currently in the process of becoming PSS accredited are a contented lot and they have good reason. The launch version of the accreditation that has been unveiled to the industry is not only good news for businesses; it's good news for the individuals charged with completing the audit process too.

The final pieces are in place and the number of accredited companies is growing. Back in 2008, the Green Project represented a tentative first step to promoting the value of sustainable P-O-P. Now it's a hot topic across Europe and the Sustainability Standard it gave birth to is giving people few reasons to decide against becoming accredited following some all-important streamlining of the process ahead of its official launch at the end of last year.

"When you register to become PSS accredited you're not just completing a process, you're joining a new way of thinking," says Phil Day, director of POPAI UK & Ireland. "One that will give you a valuable insight into the sustainability of existing processes, inform future decisions and help minimise the environmental impact of future P-O-P."

A highly-sought after independent kitemark accreditation, PSS is relevant across the complete P-O-P development process. Its seven modules cover the entire lifecycle of a piece of P-O-P. From Corporate, Premises, Design and Plant, to Materials and Processes, Supply Chain Management, Logistics and End of Life. *"The PSS is focused on enabling P-O-P suppliers to identify areas of environmental hotspots within their organisation and supply chain, and drive improvements in environmental performance,"* explains Day.

The response to the PSS accreditation launch within the industry has been overwhelmingly positive and receptive, with many leading brands including L'Oréal and Unilever already promoting its

adoption amongst suppliers. But fine-tuning the sustainability accreditation has taken some time, with great care taken over its every detail. The organisation had to be sure that the final accreditation process wouldn't become onerous and a complex maze of audit visits and paperwork. It invited companies to become involved in the early stage testing of the accreditation to evaluate how easy it would be to implement within a real-life business environment. *"It's thanks to their input that the final process is practical, workable and affordable and, importantly, far removed from the burdensome tick box exercise that it could so easily have become,"* says Day.

Various environmental management standards already exist, but the PSS is the only dedicated sustainability accreditation for the P-O-P industry and relevant across the complete P-O-P development process.

"Member companies should be proud of what we have been able to accomplish. It has been an industry effort."

The most noticeable difference from the early days of the audit's development is that the final version of the PSS has been designed as an entirely online audit process via a dedicated Checkbox portal, with no need for on-site or face-to-face visits. *"We've been very careful to ensure the resources needed to complete the audit process, in terms of manpower and investment are commercially viable*

for member companies of all sizes," says Day. Signing up to the accreditation costs just £750. *"Improved environmental performance should be accessible to all, not just an exclusive few,"* he argues.

It's simple to get started, including a suite of eGuides to take you through the process step-by-step. Companies simply need to select their chosen modules and begin uploading evidence to Checkbox. Those who successfully pass the audit process will be issued with a PSS accreditation certificate. Those who are judged to still have a little way to go in some areas will receive a 'Working towards PSS' certificate and can choose to pay for another audit, or wait until the next annual audit to become accredited.

The organisation has big ambitions for the PSS following its full launch. The only P-O-P specific sustainability standard in the UK, it's fast becoming recognised by the leading retailers and brands. What's more, it's now available globally, to any POPAI member in any country, making it the biggest standard of its kind for the retail marketing industry. *"Member companies should be proud of what we have been able to accomplish. It has been an industry effort,"* says Day.

The pragmatic principles and sense of collaborative ownership that have led the PSS to this point will be key to a successful auditing system long-term. When it comes to sustainability everything is connected. So much of environmental best practice is about manpower, management and common sense. An accessible, cohesive accreditation that leads to effective self-regulation gets our vote.



STYLE GURU

– Guy Cheston, Harrods

Preface

Harrods has been in existence for 180 years and is considered an institution in the retail industry. In-Store Insights caught up with Harrods Media director Guy Cheston to find out more about the iconic retailer's digital strategy for shopper engagement that operates at the cutting edge of technology whilst remaining sympathetic to the past.



02



01

Stretching across seven floors and 330 departments, Harrods continues to astonish and intrigue shoppers from around the world with first-class service, unmatched international brand selection and its sense of retail theatre. From its humble beginnings as a grocer and tea merchant in 1833, the modern-day Palace of Knightsbridge enjoys sales of £1.2bn.

Most of its peers are intent on remaining on-trend with the latest developments in-store at any cost. Harrods isn't most retailers. It may have fully embraced the digital age since its first early foray into screen networks but here ambition and modernisation always go hand-in-hand with long-standing retail and architectural traditions.

It's just one reason why Guy Cheston is a busy man. Since he joined Harrods a decade ago, he has helped shape the retailer's in-store digital screen network to become a benchmark within luxury retail environment. Today, he is responsible for over 200 digital screens and a team of thirty. As if the challenge of managing the retailer's complex network of digital in-store screens and branded content doesn't take up enough of his time, he is also responsible for a fully fledged in-house publishing division that produces over 30 publications each year. In-Store Insights met up with him to discuss the latest digital developments within the world-famous department store.

In-Store Insights: You started with Harrods ten years ago. How has digital changed in that time?

Guy Cheston: It has changed quite considerably. If you go back a decade ago, it really was pioneering stuff – putting a screen on the wall, putting a DVD in and pressing play. Now there are so many options and operators that, if anything, we have reached a point where there are too many choices to be made. That's the big challenge for retailers: deciding what you want, the people you're going to partner with and how you integrate it all within your store environment. Technology is changing so quickly too. It's really difficult for retail marketers to keep pace with the dynamics of how it's evolving. It's a continuous learning curve. Whatever the angle you look at modern digital it's an entirely different landscape.

ISI: As a retailer, you place a great deal of emphasis on digital networks. What's your pitch?

GC: We have around 8 or 9 different networks across the Harrods store, as well as some networks in our airport stores. We generally use screens as an advertising medium to drive advertising revenue. But perhaps more importantly we do it to drive ROI and retail sales, in terms of giving greater visibility and awareness to new brands that have come in to the store. Anyone who has ever been to Harrods knows that it can be a difficult place to navigate and digital screens really help us to drive visibility and awareness to the various floors throughout the store, and to the brands themselves.



03

ISI: How would you describe your approach to delivering digital success?

GC: I try not to get caught up in the detail of the technology. For me, it's all about imagining the next step in our story and using technology to take us there. My role is a balancing act. I have a responsibility to engage with the latest technology, I have a responsibility to the brands, I have a responsibility to my shoppers and I have a responsibility to protect the historical legacy of the Harrods' building that we have made our business. You can't draw a line between where the past ends and the future begins. I have always believed in the importance of embracing cutting-edge innovations but also in preserving our heritage and retail experience for future generations.

ISI: Tell me more about how your approach to digital screen choices is changing.

GC: We're starting to move away from multiple, individual plasma screens around the store in favour of larger format high impact, seamless video walls. We're still working on new plans and innovations but we're getting to a place now where there are definitely some things to get very excited about, and brands are certainly enjoying the impact that they're having in terms of helping to drive better ROI. Our next planned project will see us open up the back of the store near escalator three, to let more natural light through, widen the escalator and introduce new screens. Thankfully these days, the way technology is moving forward means that past issues concerning natural light and reflection are no longer a problem. Once completed the restoration project will take the area back to its original condition in the 1910s, with a modern twist.

ISI: Often digital discussions are centred on technology, yet there's another key consideration that's arguably more important to Harrods isn't there?

GC: Absolutely. Design is a very important element to us. On average, if we're talking about making an investment of £1,000 on the cost of an individual panel itself then



04

we will spend another £4,000 making sure that it is installed in the right environment, in the right way, with the correct framing to suit the natural architecture. How do you integrate modern screens into a space like the Egyptian area, that's now listed as being of cultural significance? It's why we work very closely with our designers and architects to ensure we integrate screen naturally into spaces. When screens complement their surrounding environment they work much better in terms of the impact they have on the shopper.

ISI: What are some of the biggest challenges you face in managing your digital network?

GC: Our environments are really tough in terms of dust, light, heat, cold and a lack of ventilation – our screens are asked to do an awful lot. De-cluttering the shopping environment is another key challenge for us as a retailer. There are so many store environments that you see, and we ourselves were guilty of it for several years, where retailers find every spare inch of wall spaces to communicate a message through a screen or a poster.

ISI: Harrods has taken a leadership role in content generation – how do you ensure its success?

GC: Creating engaging and entertaining content for the shoppers is paramount. So much of that is clearly dependent on the brands, but we work very hard to develop content that is more enticing, arresting and visually stimulating. Since completing an editorial shoot for our magazine to promote raincoats, I've instructed my team to look out the window. If it's raining, they're to press play on that content. It's about making messages relevant. If it's pouring with rain and shoppers come into the store they are immediately directed to hats, coats and scarves on the ground floor.

ISI: What about shopper handheld digital devices?

GC: As part of Mont Blanc's pop-up presence within Harrods last year the



05

brand trialled the use of QR codes within the window display to engage shoppers outside in the street. Clearly there's a big challenge for those of us who have responsibility for fixed networks to better understand how we can make them interact with shoppers' own mobile devices being carried in-store. That's now a very real challenge.

ISI: Many retailer forays into the world of digital end badly. What have you learnt?

GC: Not to underestimate how hard it is to keep the whole thing going. As a medium, digital is incredibly exposed. It's so highly visible that if a shopper or brand walks through the store and sees one screen down, it's much more apparent and quickly leads to negativity over compliance issues and effectiveness. The reliability and maintenance issues in terms of what you have to put in to keep a successful network going is enormous.



06

- 01 Harrods are moving to large format seamless video walls
- 02 Digital is the ideal media to bring premium brand campaigns to life
- 03 The Knightsbridge retailer is famous for its window displays
- 04 Harrods' Egyptian area is now listed for its cultural significance
- 05 Ensuring screens fit within store architecture is a key priority
- 06 Gift wrapped helicopter is proof of Harrods mantra of 'anything is possible'

THE AWARDS FOR THE P-O-P INDUSTRY



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RETAIL ON SHOW

– Marketing Week Live

Preface

No single event is better placed to offer fresh ideas and valuable advice on effective shopper engagement and ambitious, game-changing technology than the industry's showpiece exhibition held at Olympia each year. Now, with a new Retail Zone for 2013, organisers are urging exhibitors and visitors alike to take a fresh look at what's in-store.

It's all too easy, when times are tough, to stick to what you know – and who you know. But whether you're embarking on a new project or need fresh ideas to overcome old problems, there has never been a more appropriate time to go in search of inspiration.

The largest of its kind in the UK, Marketing Week Live is a comprehensive industry event that draws marketing professionals from all disciplines to the centre of London. It's also a chance for some of the largest names in the P-O-P industry to showcase the latest thinking and trends in retail marketing.

A walk through the aisles of this year's Show will do more than just hint at the shift for getting in-store right. The gap between traditional above-the-line advertising and the emerging importance of shopper marketing is narrowing. As a result, organisers have paid a great deal of attention to keeping the event relevant.

The two-day event, which fills Olympia's Grand Hall, swelled with some 13,396 marketing decision makers in 2012. Taking place from 26-27 June 2013, visitors this year will have access to an unrivalled programme of free educational sessions, bringing together thought-leaders and influencers to deliver insight and expertise from global brands. *"Our free education programme is second to none, and includes both Centre Stage and zone-specific conferences presented by global brands, as well as supplier seminars showcasing the wealth of expertise and*



insider knowledge held by the event's exhibitors," says show organiser David Mallett. Visitors will be able to gain a deeper understanding of topics encompassing the full marketing mix, and take away tangible inspiration from marketing success stories to apply to campaigns. With a comprehensive educational programme as well as the industry's leading suppliers, the Show will aim to help marketers increase dwell time, create product stand out and convert browsers to buyers.

New for 2013 is the Retail zone, supported by POPAI. Here, marketers and brand managers will be able to experience thousands of new, inspirational and cost-effective solutions, displays and technologies including point of purchase, retail display, digital media and retail design. The new Innovation Station will see industry leaders hosting a round table arena of workshops addressing retail hot topics including social media application, multichannel marketing, understanding shopper behaviour and how to effectively integrate mobile into your marketing campaign. A full Retail conference programme has been designed too, addressing trends and issues facing the industry, with sessions demonstrating practical ideas and solutions to increase sales in-store and create retail theatre

through inspiring case studies. Zone partners POPAI UK & Ireland will also be taking to the stage to announce their 2013 Awards shortlist, and to discuss Digital Media in Retail.

Also new for 2013, the Agency Ask the Experts zone will provide an opportunity for visitors to get one-to-one expert advice from leading agencies from the worlds of PR, advertising, design and creative, media planning, buying and sponsorship.

Other zones dedicated to Digital & Data, Customer Loyalty, Promotional Merchandising, Live, and Insight will complete the offering – each with dedicated exhibitors offering the latest innovations and technologies in their field, and zone-specific conference programmes where visitors can take inspiration from case studies by leading brands. There will be eight zones in total. But the bustle – and business – is likely to be focused around Retail in 2013. *"No other event comes close to offering the same direct access to the reputable and influential experts that are shaping today's marketing,"* says Mallett. *"This year's show aims to give visitors the tools to work smarter and keep pace with the exciting developments taking place within the retail industry. Whatever your marketing challenges, Marketing Week Live has the answer."*

For full information and to register, visit www.marketingweeklive.co.uk

For information on exhibiting in the Retail zone, contact **David Mallett** on +44 (0)20 7970 4471 or email david.mallett@centaur.co.uk

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HOME SHOPPING

– Global

Preface

New-generation bricks-and-mortar stores are creating a home-from-home environment. Discreet ticketing and subliminal merchandising seduces rather than shouts and makes a store experience as comfortable as shopping from your sofa. Online brands, meanwhile, are channelling the power of homely real-world retail to build tangible customer relationships.

Apartment 32



Sportswear brand Weatherproof's Apartment 32 flagship store in SoHo, New York, is modelled on a contemporary loft apartment to encourage shoppers to hang out and socialise in the space. Upon entering the store, they can check their phones in with security to create a peaceful environment (their devices will be charged while they shop). They can enjoy free espressos and there's a kitchen with a refrigerator containing water, beer and wine, a TV and a sofa. Clothing and accessories are displayed on coffee tables and wardrobes, with only one example of each item on the shop floor – further stock and fitting rooms are at the rear of the space. In keeping with the apartment theme, sales assistants are called 'residents', while shoppers are 'house guests'. Weatherproof also hosts regular social events and dating nights for its Facebook fans in-store.

Almost @ Home



The passenger lounge at Helsinki Airport doubles as a homeware store – most of the items used to furnish and decorate the space – from furniture to art – are for sale. Almost @ Home is a partnership between the airport restaurateur SSP Finland and Finnish design brands Artek (furniture) and Iittala (glassware). The aim is to reproduce the comfortable interior of a typical Finnish home. There's a kitchen with fresh food, drinks and bakery products where passengers can make themselves a snack and then eat it in the dining room. They are also invited to read a book from the library or relax in the living room while watching TV. The lounge offers private offices with computers and there's a play area for children. The lounge is open daily and is free for passengers on long-haul flights out of the European Union; other travellers can use the space for £40 per person for three hours.

Virgin Money Lounges



Virgin Money Lounges are bricks-and-mortar spaces from online bank Virgin Money where shoppers are encouraged to relax and socialise. Acting as a bridge between online presence and branch rollout, the lounges are non-transactional environments and have the feel of private members' clubs. Shoppers can have a complimentary coffee, check emails, charge their mobile phones, have a meeting, watch TV and read newspapers, with iPads and Wifi provided. The lounges borrow visual elements from high-end fashion retail, with bespoke wallpaper and artwork, velvet sofas and a baby grand piano. Interlocking tables cater for small to large meetings, as well as events such as wine tasting and book clubs. A kids' playing pod contains interactive games, traditional puzzles, reading books and free sweets. To use the lounges, customers must first register online, then collect their membership cards on their first visit. There are Virgin Money Lounges in Edinburgh, Norwich, Manchester and London.

DE-BRIEF

– N°07

2012 Permanent Display of the Year Award Winner

We start afresh in 2013, taking you through case studies of influential campaigns that triumphed in key headline categories at last year's POPAI Awards to uncover the story behind the success. Each issue we'll look at the rationale, planning and co-ordination that went into taking award-winning campaigns from idea to reality. We kick off our 2013 series with Unilever Asia and its global retail re-launch for beauty brand Pond's.

Brand: Pond's

Producer: CircleSquare

POND'S®

Facts & Figures

Production run:

4017 units

Global rollout:

Since execution began, 4,000 units have been successfully installed in 12 global markets.

Sales uplift:

Average sales growth of 15-25% where old units were replaced with new design. 36% increase achieved within hypermarkets in China, a key global market.

Breakeven:

Strong sales allowed Pond's to break-even on the costs of units at an average of 3-5 months.

Sustainability

LEDs used consume 61.5% less power and reduced heat by 10 degrees, increasing shelf life of products by an average of 5 months



Overview

Despite being one of the most beloved face care brands, with a rich history of innovation that has inspired the growth of the category since 1886, Pond's has grown through mass trade channels. Whilst good for short-term business this has given the brand a mass-market signature. As a result, Pond's brand owner Unilever embarked on a project to deliver a retail re-launch across the key South East Asia market that would deliver a prestige level of in-store brand expression without alienating its established retail channels. Success would be measured not only by increased sales but, crucially, by the number of high-end retailers and department stores that allowed the Pond's brand to enter their prestige retail space, sitting alongside established prestige brands such as Dior, Chanel and Guerlain, despite its mass market price point.



Analysis

The first challenge the project faced was the sheer scale of the execution. Pond's has a wider distribution than any prestige beauty brand covering literally thousands of stores in multiple global markets and across 10 different trade channels including hypermarkets, supermarkets, shopping malls and independent drug stores. Given the global reach of the Pond's brand, it was essential to also recognise the varying levels of store sophistication and the associated product range availability from high-end downtown malls in Shanghai and Hong Kong to independent "mom 'n' pop" stores in Indonesia and Philippines. This not only made modularity mandatory but also meant fixtures could not rely on ambient lighting.

The development process itself began, not by getting the brand to look at what the prestige brands were doing and trying to replicate their look and feel, but instead by starting to think like a prestige brand. "It's just human nature to look around and see what others are doing," says Philip Handley, owner of CircleSquare. The trouble is, as he is quick to point out, most premium brands have a two-year turnaround in terms of designing a concept, getting it signed off and getting it to market. "Not just that. Sometimes it's been in-store for a good few months before you see it. Then you've got to go through the production process. So what you ultimately put out into store as a brand in your attempt to copy what Dior is doing is a solution that's already three or four years old." The result, he explains is that you remain

CAMPAIGN ANALYSIS



forever stuck in mass market. "The key for us on this project was to ignore what others were doing in favour of doing what we knew was right for the shopper," says Handley. "It was a bold move and it took a bold client to believe in us."

There was another, more visually apparent challenge. "Pink was a huge issue for us as it's not typically a prestige colour," says Handley. The initial reaction was to think that the brand should move away from pink. But it soon became evident that it was so synonymous with the brand and acted as such a strong signpost for the category. Another more practical issue with the brand colour was its impact on the display when illuminating the product. For this reason, the use of pink lighting was moved outside of the mirror frame effectively surrounding the display with a pink halo that marks the start and finish of the display and shines like a brand beacon to guide shoppers to the display.

But perhaps the one of the biggest challenges was how to execute quality



in scale, across markets with limited capabilities. To achieve this, the CircleSquare team also partnered with Imagine POS, a partner of Li and Fung group, based in Hong Kong and with operations in China, which developed a regional injection moulding method. CircleSquare also visited a lot of Unilever's rostered factories to determine their individual capabilities for production such as the quality of LED lighting and fabrication methods. "Capabilities varied dramatically from region to region to the extent that we bulk acquired the lighting and had them called off by local markets so that we knew consistency could be achieved," says Handley.

The final design received positive recognition from key accounts and has managed to increase the gap of quality presentation in-store versus Pond's key competitors. This is best demonstrated by an independent study carried out by TNS, which maps shopper perceptions of the brand against five key criteria. Compared to Pond's historic competitor brands such as Garnier, L'Oréal and Olay, the new retail units are now pushing the prestige end of the spectrum, matching and in some instances surpassing the target brand, Estée Lauder.

Why it worked

Masstige Appeal:

A strong emphasis was placed on premiumising the materials and improving the quality of the build and finishing, taking the brand towards what was termed the 'masstige' – between mass market and premium.

Longevity:

The new retail units are built to last 50% longer than the old units, reducing the need to replace counters regularly.

Simplicity:

The creative solution allowed the display and the product space to breathe by keeping branding minimalist and resisting the urge to pack the shelves with product. The finished design forced compliance upon merchandising teams by incorporating sections of clean, clear space that could not be compromised and enabled the shopper to enjoy shopping the fixture.

Each issue, we ask an industry professional for their expert view on our featured campaign.

EXPERT DIAGNOSIS: MORRISONS



Jake Kirkham, store format and design manager at Wm Morrison Supermarkets

"A bold investment by the brand that delivered pitch-perfect presence and impact for both the brand and the international market. The finished design is an attractive concept that brings the brand to life in new ways, offering a good mix of display units for all occasions.

Just as importantly, the unit successfully overcame the complexities of such a challenging global brief and despite requiring significant investment to create such impressive standout, it delivered impressive commercial results and real value back to the business."



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SPRING SEMINAR

Thursday 25th April 2013 9.30am-12.30pm

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- Initial customer feedback and results

Martin Bitmead, Retail Design Manager, B&Q

PRICE **Members:** FREE **NON-Members:** £150

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SHOP WORK

– Industry update

Reports

Trend lightly

Monthly P-O-P Watch



Creating an engaging and exciting display or store environment requires creative and intelligent design and more than a little sprinkle of fresh inspiration. And getting fast and efficient access to the in-store ideas trending around the world is vital. That's why POPAI is committed to bringing you a new regular series of monthly P-O-P Watch reports on retail trends, highlighting the great and the good of P-O-P display, pop-up shops, new store concepts and product presentation –

www.popai.co.uk/market-intelligence

Events

Home truths

B&Q confirmed as speaker at Spring POPAI Meeting



Offering a unique perspective on the in-store approach of the UK's best-loved DIY retailer, B&Q's retail design manager, Martin Bltmead will be on hand to present at the forthcoming POPAI's Spring Seminar to be held at the Commonwealth Club in London on 25 April. He will be joined on stage by Unilever's Nick Widdowson who will explore the brand owner's recent progress on improving the sustainability of its P-O-P displays – www.popai.co.uk/events

Preface

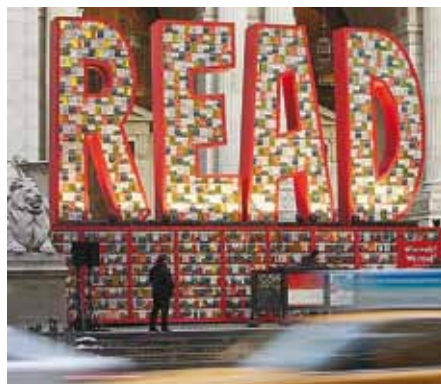
In this issue, In-Store Insights' round-up of the latest POPAI activity covers everything from the forthcoming GlobalShop event in the US, to details of confirmed

speakers for the first POPAI Seminar of 2013, important changes to legislation for P-O-P printers, and the listing of its dedicated P-O-P textbook on a familiar online retailer's website.

Books

Selling power

Book pops up on Amazon



Edited by Andy Cropper, senior lecturer in marketing at Sheffield Hallam University with foreword by former IPA chairman Hamish Pringle, P-O-P Advertising & The Shopper has enjoyed strong sales since its launch in June last year. A recognised reading resource on best practice within the industry, the book offers an essential guide to point-of-purchase advertising in the UK and Ireland as well as a useful insight into the practical application of the discipline and what it takes to succeed within it. Best of all, it's now available to buy through online retailer Amazon, priced just £34.99. Search 'POPAI' to buy your copy – www.amazon.co.uk

Trade Expo

Globalisation

Chicago, IL



The US will be the place to be in mid-April as the world of P-O-P makes its way to this year's GlobalShop event. Taking place between 16-18 April, it's the world's largest annual expo for retail design and shopper marketing and the only show in the world with six pavilions of fresh ideas and innovative in-store solutions together with a powerful keynote session and valuable conference programme lead by today's brightest retail experts – www.globalshop.org

Legislation

Up rooted

EU Timber Regulations



New EU Timber Regulations coming into effect soon will have an implication for printers involved in the P-O-P industry.

Those sourcing their paper and board from suppliers within the EU will be classed as traders and will have to keep supplier records for a period of 5 years minimum. But for those sourcing from outside the EU, the changes will see them classified as operators, requiring them to meet due diligence requirements. "I expect that there will be minimal impact on most printers," says Jon Stack at Print Media Certification. "However, we may see some buyers stop requesting FSC or PEFC materials through a chain of custody, given that there should now be greater certainty of the legality of the supply chain for all material sourced in the EU."

Membership

Building for the future

Joining members

2013 has started pretty much as it left off at the end of last year, with a flood of new membership applications into the POPAI office. The list of new members joining includes a host of leading names from the industry – 16 in total, such as Samsung, Pernod Ricard (Irish Distillers) and a range of P-O-P manufacturers, designers and new media specialists. Not already a member? Discover more – www.popai.co.uk/whyjoin

BANISH BLUES

- Spain

Preface

The country has never had a problem convincing the world to admire its golden beaches, love of lazy afternoon siestas and its ability to even make sherry cool. But things are not so sunny in Spain these days and P-O-P is being hard pushed to inject a spring into the step of the nations' shoppers.

Spanish retailers have taken a knocking over the past couple of years. According to latest reports, retail sales have now fallen for 30 consecutive months and were down 10.7% year-on-year in December 2012. The economy has been hit hard by the Eurozone crisis, unemployment amongst young Spanish people has rocketed to 60% and austerity measures are causing acute pain across the country. According to a global study carried out by consultancy firm, Nielsen, 86 per cent of the Spanish claim to have changed their buying habits over the last year in order to save on household expenses.

Spain may be having more than its fair share of national setbacks at the moment but marketers are doing their bit to keep shoppers coming back. Price is clearly a decisive factor in many purchase decisions, and in-store communication is, unsurprisingly, centred on discount and value messaging. *"Shoppers have a 'new' outlook that considers paying for expensive products to be absurd,"* says POPAI Spain general manager Ignasi Cusi. *"We are a nation of bargain hunters."*

According to Cusi, estimated P-O-P annual spend by retailers and brands remains strong at €1.27million. Local and international cosmetics brands such as family-owned Puig, Unilever and L'Oréal are continuing to invest in the P-O-P market as well as the likes of Telefónica, BBVA and department store El Corte Ingles. Electrical goods are ranked number two in terms of P-O-P spend, followed by the fashion sector, despite the Nielsen report showing that 56 per cent of Spanish shoppers are buying fewer clothes in order to save money.



01



02

The brightest ray of light however comes in the form of Valencia-based supermarket chain Mercadona, which has bucked the downward sales trend whilst many around them have struggled to make headway.

Mercadona has hired 10,000 new employees since 2008, opened 228 new stores. It also saw sales increase 8 per cent last year, whilst Carrefour sales in Spain fell 5.4 per cent in the third quarter of 2012. As a result, the family-owned retailer is fast becoming a model for success in a country urgently trying to rewrite the rules for its economy.

Cusi also remains confident for the outlook of the local P-O-P industry. *"Our industry is very strong and we are hugely proud of our creativity. We consider ourselves to be very rich in ideas."* And whilst adoption of new media in-store may still be in its infancy across the country, both Spanish marketers and shoppers are becoming quick to warm to the trend for QR codes within the retail environment. *"Spanish shoppers love everything related to the concept of 'new media',"* explains Cusi. So much so that Barcelona became the first city in Europe to launch a virtual QR supermarket in the city's Sarria metro station in early 2012.

However, it's not easy to forget the challenges that still lie ahead. A report by El Economista found that 82 per cent of Spanish shoppers do not foresee an economic improvement in the next twelve months. So while marketers may have the tools to deliver a healthy shopping experience in the years to come, Spanish shoppers may have to wait a little while longer yet for their time in the sun again.



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- 01 Austerity is taking its tolling on Spanish shoppers
- 02 The country still has a wealth of creative talent on show
- 03 Spanish retailer Camper's latest Madrid store concept
- 04 Store redesign for Marques de Riscal, one of Spain's most traditional wineries
- 05 Children's retailer Imaginarium brings its fair share of fun to in-store
- 06 Valencia-based supermarket Mercadona is a retailer on the rise



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