

POV:

In-store communication strategy needs to embrace the analogue/ mobile mix

55% of shoppers use their mobile phones
in stores

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Insights and Implications

Across generations, 68% of shoppers are coming to stores one or more times per week—despite the proliferation of online shopping and adoption of alternative fulfillment methods that allow shoppers to skip the store entirely. Shoppers naturally resort to the path of least resistance—the fastest and easiest way to fulfill their needs. In the moment, they are picking and choosing from a mix of digital and analogue communication.

Smartphones are now part of the in-store experience (especially for younger shoppers), mostly as a tool to look up ways to save (searching for coupons and comparing prices, for example). Yet only one-third of shoppers feel mobile phones can be a supplement for signage in helping to find what they're looking for. One in five rely on signage for store navigation, and it's still the best way for new or sale products

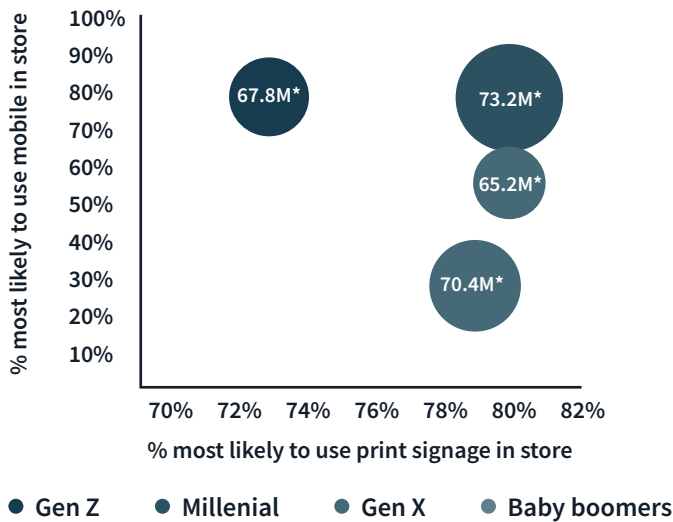
to get their attention in-store. In our client work, we've learned from shoppers that even after more than a year from install, wayfinding is still seen as vitally important.

These findings drive home the need to approach retail communication as a “phygital.” Signage is still important, but mobile needs to be integrated into the overall communication system—and needs to be supported by retail-focused content.



Generations and genders see things differently

Though all people rely on signage to some degree to navigate brick-and-mortar stores, there are notable generational differences in attitudes and behaviours. The biggest discrepancy is between Millennials and Baby Boomers, which has implications on retail communication depending on the brand's shopper base.



*2021 US population share by generation

Generational differences might be most dramatic, but there are also gender differences. Females are more likely to use signage more before asking for help than males (91% of Top 2 Box (90%). Males, who are generally more mission-driven shoppers, use their mobile phones while shopping in stores more often than females (57%).

Mobile is a companion, not a replacement

55% of shoppers are using their mobile phone to support their shopping experience in brick-and-mortar stores. They are doing things like searching for online coupons, comparing a product's price to other stores or online marketplaces (e.g., Amazon), and looking up ratings and reviews. Yet only onethird are using their phones to find where a product is located in-store.

Experience says that shoppers are using whatever's fastest and easiest for them in the moment.

Shoppers use print signage for:

	Gen Z "Mobile shopper"	Millennial "The adapter"	Gen X "The laggard"	Baby boomers "The traditionalists"
% Identifying sale or clearance items	83%	90%	92%	93%
% Locating items on their lists	70%	81%	82%	88%
% Comparing items on the shelf	70%	98%	79%	83%
% Finding new products	71%	82%	80%	79%
% Comparing items by packaging	71%	81%	77%	79%

Shoppers use mobile for:

	Gen Z "Mobile shopper"	Millennial "The adapter"	Gen X "The laggard"	Baby boomers "The traditionalists"
% finding coupons/discounts	52%	56%	51%	25%
% Comparing prices to other stores	47%	52%	46%	16%
% Comparing prices to online markets	52%	50%	43%	16%
% Checking product availability	52%	48%	44%	15%
% Using QR codes to find product info	39%	41%	36%	11%

New fulfillment experiences are part of the package

As retail communication systems are updated, it's critical that retailers optimize their alternative in-store and curbside pickup fulfillment experiences, too. Two-thirds of shoppers are using in-store pickup at least once every few months, and half are picking up curbside. Most feel some stores are doing a better/clearer job than others at in-store or curbside pickup.

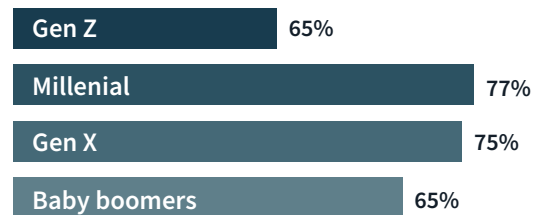
While most shoppers understand the shopping process, and even find it fairly clear and simple, 23% still have some confusion. Females feel that instructions are inconsistent and have higher need for help. Because they are likely to shop multiple retailers and use curbside more, they're likely to notice differences in processes across retailers. The generation that finds the process most confusing is Gen Z. This could be due to using curbside less frequently, but also is indicative of the dichotomy in Gen Z behavior between being digitally ingrained and having analogue cravings.



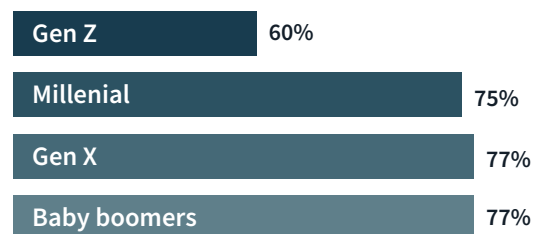
% agree that picking up an online order in-store is easier at some stores that others



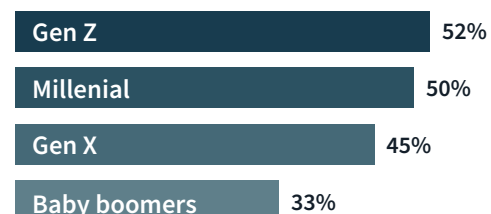
% agree that using curbside pick-up is easier at some stores than others



% agree that typically, it is clear where to park when doing curbside pick-up

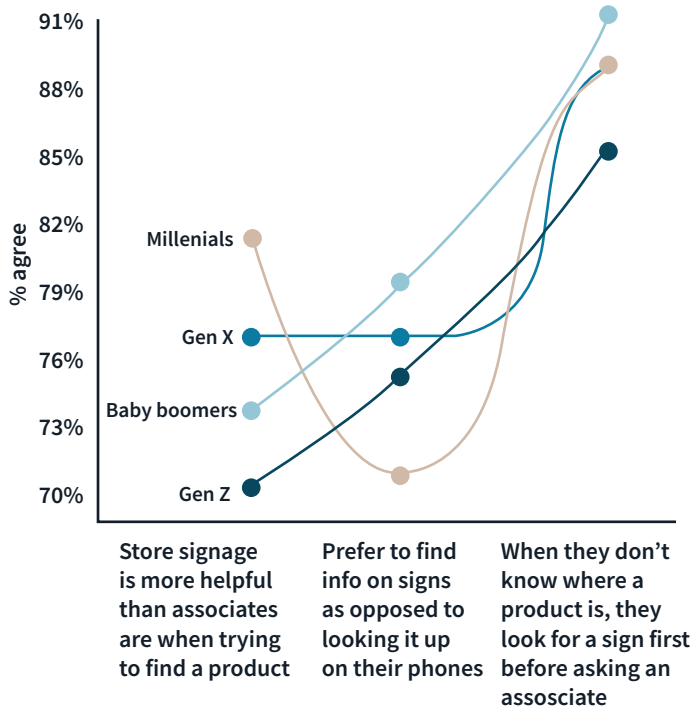


% have had to call the store or go inside for help when doing curbside pick-up



People don't read signs...or do they?

We hear all the time that people don't read signs. Yet shoppers say they generally rely on store signage to find the products they're looking for, and always look at signage at the shelf when deciding what product to buy. Signage at every level – Announce, Amplify, and Explain – continues to be a critical component of the in-store experience. Most people prefer using in-store signage instead of using their phones, especially in a new store. Shoppers are taking the path of least resistance in the moment—it's simply faster to look around for wayfinding and visual cues than it is to open an app, take a few clicks to a map, locate an item on the map, and use the map to confirm direction in the store.



Though nearly everyone uses signage, the crowd is split on the right amount of signage. Many think that there are too many signs, and even those who think that there are too few say there's not enough information to be helpful. Both indicate that shoppers are not seeing what they're looking for when they need it. With most shoppers being in a constant state of partial attention, it's important to not overcommunicate and to strategically communicate the right information at the right time and place.

42%

“ say there are too many signs

49%

“ say there are too few signs, but not enough information



Optimizing the mix

The future of retail communications will evolve to include much more dynamic content. Perhaps AR holograms, personalized experiences triggered by biometrics, and a blurring between real and metaverse worlds will become as companionable to signage as mobile phones. But even right now, retail communication strategy needs to be inclusive of all the ways in which the messages shoppers want and need can be delivered at the right time and place in their journey.

Delta Air Lines is now using a “Parallel Reality” departure board at Detroit Metropolitan Airport—a digital screen which uses nonbiometric object detection and “multi-view pixels” to display personalized flight information to numerous travelers simultaneously.

5 optimization steps

Know your customer

- There are clear differences between generations and gender. Understanding your customers’ preferences and pain points helps you develop a communication plan that works for all of them.
- Lean into your target—integrate more mobile for Gen Z and males, lean into clear, consistent signage for females and older generations, and take a balanced approach for general/mass audiences.

See the big picture

- Consider the entire customer journey—what is experienced before coming to the store, during the in-store experience, and how people shop differently for different kinds of products.

- Consider category adjacencies, product organization, visual merchandising, and packaging as part of the visual communication system, which can sometimes be more helpful than added signs.

Use the right mix

- Signage is still the preferred tool for navigation and product comparison (along with packaging) and is the best way to call attention to new, sale, and seasonal items.
- Traditional signage is simple and cost-effective, but dynamic digital signage may offer greater flexibility for frequently changing seasonal, sale, or pricing signage.
- Mobile helps shoppers go deeper with more detailed product info, ratings and reviews, price comparisons, coupons/discounts, and item availability

Converge channels into a seamless experience

- Integrate retail communications into the overall content strategy mix.
- Recognize that digital is the front end of the in-store experience!
- Ensure continuity between out-of-store and in-store communication.

Edit to amplify

- Use a clear hierarchy of information to delineate levels of communication.
- Less is more—evaluate all current signage and eliminate the extraneous.
- Use simple, easy-to-understand language and visuals (images and icons can say more than words).
- Manage all this continuously/ periodically—don’t just “set it and forget it.”



About this study

Design Solutions conducted this online study in partnership with Big Village between May 11-13, 2022. It consisted of an omnibus CARAVAN® survey with 1,007 demographically representative U.S. adults ages 18 and older.

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