2017 Shop! ROI Standards: STORE REDESIGN

Examining Motivators, Metrics and Meaning Behind Store Redesign Projects
A special thank you to our sponsors Specialty Lighting, Stylmark, Canada’s Best Store Fixtures Inc. and Trion for their support and also the Research Council and the ROI Standards Task Force for their work in developing this white paper.

In today’s retail climate, ROI data is no longer a “nice to have.” Retailers are counting on their suppliers to provide the information they need to demonstrate ROI when they implement changes in store design—whether it’s improved signage, upgraded fixtures, a new mannequin line, or a complete redesign.

In our continual effort to drive an industry dialog on ROI, Shop!, the trade association focused on enhancing retail environments and experiences, is pioneering the development of industry standards for Store Redesign ROI. In 2014 Shop! worked with EWI Worldwide to gain an understanding of this topic. The EWI team surveyed retailers with physical remodels regarding their motivations, goals, and expectations of a store redesign. The information was shared in a 2015 EWI White Paper that was inserted in Retail Environments magazine.

Building off of those findings, Shop! has endeavored to further understand the current ROI measurement habits of retailers, store designers, and manufacturers. Shop! conducted a survey for the first phase of the research with key industry players in retail, store design, and fixture manufacturing.

The 2017 Shop! ROI Standards: Store Redesign white paper offers actionable insights, case studies, and best practices based on the findings of our recent studies. I hope the takeaways in the following pages will help you justify your investments to create and execute successful store redesign projects that ultimately enhance the retail experience for shoppers.

This is the first of a series of ROI research from Shop! in 2017. Later in the year, Shop! will release results on Understanding the Effect of the Retail Workers’ Service on the Customer Experience and How it Ties Back to Return on Design.

For questions or more information about the report, please visit the Shop! website at shopassociation.org, email us at info@shopassociation.org, or call Madeline Baumgartner, Shop! Director of Education & Research at 312-863-2917.

Thank you!

Steven Weiss, CEO, Shop!
In order to combat the alarming decline in the number of store visits, retailers need to motivate consumers to get out of their chairs and go to the store. Retailers need to focus on giving shoppers what they cannot get at home, in an environment that entices them to make the journey.

Making those changes require resources and resources require ROI justification, yet there are no definitive industry standards for measuring the results of the investment. Measurements that are available are often fraught with caveats, varying by sector and oftentimes neglecting intangible, but significant, costs or benefits.

At the same time, projects must include commitment to credible, attainable ROI, a goal that is often a battle with uncertainty. This is driving discussions between retailers and their vendors. Discussions revolve not only around identifying the experience goals and execution plan, but also around the results the retailer can expect to gain from the investment.

To aid in the calculation of ROI, Shop! seeks to understand key ROI variables, considerations and methodologies for the industry.

By understanding these key factors (both current and emerging), Shop! will work towards the creation of ROI standards for store redesigns. Shop! is working collaboratively with key industry players from the retailing, branding and store design industries to create these standards.

In 2014, Shop! worked with EWI to gain a base understanding of the ROI on retail design. The research was concentrated on stores with physical remodels affecting a variety of shopper influencing factors. The EWI team cross-referenced the data from the various projects and gathered data through a survey of current retailers. The surveys focused on understanding the retailers’ motivations, goals, and expectations of a store redesign, as well as, identifying the various scopes of each project.

Building off the findings from the EWI Paper published in 2015, Shop! endeavored to further understand the current ROI measurement habits in the retail industry. Last fall, Shop! conducted a survey with key players in retail, store design, and fixture manufacturing.

According to Retail Next, 94% of retail sales are still occurring at brick-and-mortar stores, yet foot traffic is declining at an annual rate of 15% and half of the customers are showrooming.
The 2016 survey was conducted to understand:

- goals & metrics used to measure ROI
- target levels for ROI
- frequency for calculating ROI
- criteria for determining if store redesign was a success
- criteria for determining/evaluating the role of any specific design element(s) in the success (or failure) of the store redesign

Key findings from the survey include:

**Definition of “store redesign” was wide ranging.** There is an old truism: ask three people a question and you will receive three different interpretations of the question. Shop! found this to be true when we asked retailers, designers and store fixture manufacturers to define “store redesign.” Respondents used words like remodel, redesign, refresh, retrofit, reconfigure and renovation. The variety of terms reflected the range of design scope, from minor changes to completely new stores. Elements of redesign included everything from interiors and architecture, fixtures and flooring, graphics and branding, and everything in between. Rebranding and enhanced customer experience were also mentioned in describing a “redesign”.

**Redesign lifespan depends on whom you ask.** In terms of how long a store redesign should last, the three respondent groups again had different responses: manufacturers thought 3-4 years; the majority of designers believed 5-6 years, while retailers’ responses were spread throughout the ranges, depending on their definition of redesign. However, 90% of retailers did not expect a store redesign to last more than 6 years before an update would be required. Not surprisingly, the smaller the remodel, the lower the expected ROI, and the lower the expected lifespan of the remodel. Conversely, the larger the remodel, the larger the expected ROI and lifespan.

**Perceptions of retailer motivation differs.** Shop! research also found designers and manufacturers had different perceptions of what motivates retailers to embark on a store redesign. Understanding these during the planning phases of the project will help suppliers to better serve the retailer.

**KEY LEARNING:**
Designers and manufacturers need to better understand retailer motivations for a store redesign to help meet their core objectives.
Future of Bricks and Mortar

According to Shop! Research, retailers almost unanimously agreed that the in-store customer experience is very or extremely important to them. Retailers also see brick-and-mortar stores as extremely important to their business and foresee its importance continuing, if not growing, for the next five to ten years.

To help ensure continued growth, the industry must innovate around three themes: Experience, Convenience, and Personalization. Store design, fixtures and visuals must support experiential and interactive environments. Investments in digital technology must support market demands for convenience. And custom-designed displays should be leveraged to create a unique, personalized value for shoppers.

In the 2016 Industry Size and Composition Study, Shop! identified five retail trends that are transforming the retail landscape.

**Shrinking selling space.** Stores are getting smaller, and the number of outlets is shrinking, even as U.S. retail value sales are growing. Consumers are cutting back on the number of trips and doing more big-box, one-stop shopping trips and shopping online. As such, store fixtures need to maximize space utilization and do more with less. Portable, movable and/or adjustable fixtures will be increasingly important.

**Rise of omnichannel retailing.** Stores are now playing the role of showroom and distribution center, rather than buying center. In many cases, there are separate areas for click and pick-up with stores are being redesigned to convey this multiplatform message. Innovative retailers are creating hybrid stores where the physical and on-line merge seamlessly, and cater to shoppers with ultimate convenience and ease of access.

**Online retailers opening physical stores.** A growing number of successful online retailers are opening physical locations to create a more in-depth experience for their customers. Fixtures can help bridge the gap between the online and physical realms by carrying themes and colors from online to in-store.

**In-store retailing becoming more interactive and experiential.** Retailers are seeking fixtures and displays that are customized to meet new interactive and experiential retailing strategies. Designs must aid in the creation of the store itself as a brand, as well as a place for customers to experience brands.

**Refreshing/remodeling/redesigning of stores is happening faster.** Successful retailers will have the ability to change rapidly. Stores are refreshing, remodeling, and redesigning themselves much faster than they were able to do even a few years ago. There is a higher demand for fast turnkey solutions, along with an increased pressure on suppliers to remain aware of and anticipate trends.

**KEY LEARNING:**

Larger industry trends indicate that stores must deliver more experiential environments that seamlessly merge the physical and digital. Consequently, store design needs to keep up with rapidly changing technologies and shopper expectations to be successful.
Lighting for a Store Redesign  BY SPECIALTY LIGHTING

Retail Lighting
Historically, retailers have been limited to the types of lighting and lighting capabilities they can use in a store redesign project. Until recently, light fixtures had to be designed around traditional light sources (e.g., incandescent, halogen and fluorescent lamps). This limited not only the style of the lighting fixtures, but also the function of the lighting.

The past five years has brought about numerous changes in the lighting industry. In an industry once dominated by incandescent and fluorescent lighting, LED (light-emitting diode) has quickly emerged as the preferred lighting source of many lighting designers.

LEDs provide numerous benefits to the designers including the flexibility to change lighting design without being held to traditional light sources. This allows designers to more easily create different moods within the store. LEDs also enable designers to create a more inviting shopping experience by not only having the capability to enhance products, but also product colors and textures.

Project Management
The key to a successful lighting project is to have the project specifics identified at the start of the project. Most designers understand lighting needs to be changed in the redesign, but they do not necessarily know what specific lighting fixtures are needed. Lighting suppliers can assist with these decisions by understanding the environmental needs of the light, the mood the retailer is trying to create, what products and store fixtures need to be illuminated, and how flexible the lighting has to be. Does the retailer need the capability of adjusting the color temperature of the light or the light levels to enhance a product or change a mood within the store? This is especially important for retailers who routinely change the content and location of their product displays.

Success Metrics
ROI on lighting products is calculated in many different ways. Cost for the product and installation is usually included, as is life of the fixture and light source, and product maintenance. Energy savings associated with the use of new light fixtures is another key metric. Retailers can measure ROI on replacement lighting projects in terms of energy savings, often measured as wattage savings per square foot and/or wattage savings per store. Customer Satisfaction with the shopping experience is another key metric. Traditional light sources (namely incandescent and halogen) not only create added ambient heat within the environment, but can be harsh on the eyes without proper optics and reflectors LED fixtures, when designed correctly, generate very little ambient heat. This not only makes for better shopping experience, but helps to lower the cost associated with operating the heating & air system. Customer research can provide additional insight into the effectiveness of the overall environment.
Store Redesign

**Internal Stakeholders**
When working with a retail partner, knowing who is ultimately responsible for the store redesign is critical. Shop! found that for most retailers, the Store Design team usually had ultimate responsibility for redesigns. However, other responsible departments included; Marketing, Operations, Visual Merchandising and Construction.

Retailers are investing more into unique designs and technology in order to create an interesting, interactive, and memorable experience for customers. At the same time, online retailers are starting to open brick-and-mortar stores to augment the online experience. Their stores are not necessarily a place to buy the product, but to have physical interactions, including customer service and product trial before deciding to purchase it. This trend is beneficial for in-store marketing and store fixtures/visual merchandising suppliers.

Retailers are moving away from “cookie cutter designs” by integrating technology and interaction with technology in stores, such as using tablets for POS screens, and replacing static messaging with touchscreen engagement. As mobile usage continues to grow, retailers are seeking ways to capture the attention of people on mobile devices. Retailers are experimenting with iBeacons and other devices to push information to customers as they walk through different areas of the store.

Allocating budget to hybrid stores and online platform development affects the budget allocated to traditional in-store marketing and store fixtures/visual merchandising. Store designs must support new technology and new business models. Brands are creating their own stores, and traditional businesses are looking to reinvent themselves, which is leading to more store renovations.

Industry experts believe retailers are in the midst of a “full-scale transformation” as retailers become more comfortable with data and are merging the data with creative and personalization initiatives. Retailers are trying to refresh, remodel, and reinvigorate their stores. But, they are spending less money in terms of visual merchandising and are looking for less expensive solutions. There is also a push for localization. Companies are adding a greater level of local relevance to what is right now a chain solution.
CASE STUDY: Storefront ROI in the United States  BY STYLMARK

Retailer Victoria’s Secret approached Stylmark to develop an anodized aluminum extrusion that could replace the current steel extrusion they were using on their storefronts. Victoria’s Secret existing storefronts were made from a mirrored stainless steel. These steel extrusions used for the storefront were heavy, very difficult and time consuming to install.

**Design Elements**
To begin the project, Stylmark developed a die similar to the existing steel extrusion that was twelve inches tall and developed a special finishing machine to achieve the same look as the current steel extrusion. Next, Stylmark developed a concept die drawing that was approved by Victoria’s Secret’s store design team based off the current steel storefront extrusion being used. Then, working with Stylmark’s aluminum extruding partner, they finished the drawing, developed the tooling and did a die trial that took about four to five weeks. Once the die trial was approved, production on material began which took about two weeks.

**Project Management**
There were ten stores in the redesign program. A Stylmark account manager worked directly with the store design team from Victoria’s Secret. The account manager brought the design vision to the Stylmark engineering team who developed the die. Once the die was developed, Stylmark’s purchasing manager worked with their extruding partner on the die trial and then once the trial material was approved, store-ready extrusions were run. Those extrusions were then anodized to the 118 Victoria “Steel” finish and delivered to the customer. The finished product can be seen in the picture below.

**Outcomes**
While both the steel extrusion and the anodized aluminum extrusion are very durable, the anodized extrusion installed in less time, required less labor on site and cost less to ship. The original cost per square foot was $220 and using the new material reduced the cost to $20 per square foot.

**Return on Investment**
This was a 60% savings on material – and about 25% savings on labor. This was an immediate return for the retailer. Ten stores received the new storefront aluminum extrusion during this rollout.

**QUICK FACTS**
- **Motivation:** New Storefront Look
- **Sector:** Women’s Apparel
- **Number of Stores:** Ten
- **Project Budget:** N/A
- **Desired ROI:** N/A
Store Redesign Metrics

Understanding what motivates retailers to execute a redesign will help suppliers better serve their client. Knowing the key metrics and how to measure them, that will help suppliers show their value to the retailer.

Shop! found some variation in the importance of various metrics as ratings varied among survey respondent groups. The key to every successful project is making sure these metrics are clearly defined and agreed upon at the start of a project.

For retailers, ROI (23%) was the most important metric in determining the success of a store design followed by overall store sales (17%), market share (10%) and conversion rates (10%). However, when asked about the relative importance of other metrics, 91% of respondents stated brand perception was very/extremely important. 81% of respondents stated brand awareness was very/extremely important.

Designers on the other hand stated that sales per square foot (23%) was the most important metric in determining the success of a store redesign, followed by overall stores sales (15%) and sales lift across all channels (15%). When asked about the relative importance of other metrics, 96% of respondents stated brand perception was very/extremely important and 82% stated brand awareness as very/extremely important.

Finally, manufacturers stated overall sales and ROI were the most important metrics in determining the success of a store redesign (tied at 25% each). When asked about the relative importance of other metrics, 88% stated brand awareness and sales per square foot were very/extremely important.

KEY LEARNING:
Ultimately, a store is the reflection of its brand and thus any design/redesign must reflect the values and value of that brand. Helping the retailer achieve such brand alignment and sales increases will help ensure a continued position as a valued partner.

KEY SUCCESS METRICS: RETAILERS

<table>
<thead>
<tr>
<th>Metric</th>
<th>% Very/Extremely Important</th>
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<tbody>
<tr>
<td>Brand Perception</td>
<td>91%</td>
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<tr>
<td>Overall Store Sales</td>
<td>87%</td>
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<tr>
<td>Brand Awareness</td>
<td>81%</td>
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<tr>
<td>Brand Loyalty</td>
<td>81%</td>
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<tr>
<td>ROI</td>
<td>72%</td>
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<tr>
<td>Footfall (in-store traffic)</td>
<td>71%</td>
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<tr>
<td>Category Sales</td>
<td>69%</td>
</tr>
<tr>
<td>Sales per Square Ft.</td>
<td>69%</td>
</tr>
</tbody>
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Source: 2016 Shop! ROI Standards: Store Redesign Survey
After working with CBSF Inc. to complete market analysis and develop their retail strategy, Westburne Electric had the opportunity to implement its new concept store in an existing market. Designed by CBSF Inc., this concept was the first to create the physical retail manifestation of the brand and experience.

**Design Elements**

The retailer wanted to create a retail experience that celebrated the company brand and make their customers feel comfortable, which is not characteristic of its competitors. It was important the concept be flexible to adapt to varying sized locations in their network of stores, ranging from 700 square feet to 3400 square feet, and showcase a wide range of products. Durability and quality were key to ensure their investment has a strong ROI (3 years).

Two key features of this concept were the Power Lab and branded signage. The Power Lab was a designated area that served as a place for contractors to get their devices charged while they waited for orders. The area also provided contractors with information about alternative power sources, full energy solutions and other services the client provides. Information was presented in printed form through signage, supporting material on table top and trained staff on site to support and encourage discussion. The Power Lab consisted of laminate and metal tables with stools, and colored walls to promote the brand and create a focal area.

The original intent was to leverage tablets and digital content, but as CBFS Inc. saw consistently across retailers in all markets, the task of content creation and management was typically a forgotten element and felt like a daunting task with little to no resources allocated to support in-house, and no budget to hire external management.

Celebrating the retailer brand in store was not common in the industry. Branded signage to promote the retailer was pushed as the primary focus, with secondary status given to vendor and supplier branding. In this market, the retailer branding reminded the customer where they are...
shopping, and the vendor and supplier branding was important to retain credibility in offering. A combination of snap frames, printed vinyl applied direct to wall, along with card stock in acrylic sleeves were leveraged for both brand and category messaging.

**Metrics of Success**
The redesign of a store at any level isn’t just a new look; it typically leads to store operations changes. This is why CBSF Inc. encourages retailers use metrics that measure staff adoption along with customer perceptions and financial. In this particular project the metrics were as follows:

- Staff adoption of new processes, customer service training
- Increase in customer loyalty program subscriptions
- Increase in sales – especially over the counter.
- Project cost ($/sf costs) a key factor.

**Costs & Capital Investments**
Westburne’s costs covered everything from services, to fixtures, to team training. In particular, the costs used to calculate the costs ($/SF cost) for this particular project included software licensing and hardware costs for customer tracking analysis to understand current shopping patterns; store design, planning and graphic services; manufacturing of custom retail elements and sourcing of commodity fixtures; printing of large and small format signage; installation of retail elements including some GC work; and Westburne team member time for training to learn how to conduct business in the new store concept.

**Outcome vs. Expectations**
Outcomes exceeded expectations on all fronts. From a store operations perspective, staff are embracing the new concept and the opportunities it provides to enable a better experience for customers. For the customers, surveys and focus groups provided insights to the concept with potential minor improvements recommended. The biggest feedback is this Westburne store really differentiates from competitors, making customers linger in store longer with the feeling of being serviced quicker. The new format has seen steady growth at or above targets as compared to previous year same store sales. As for the costs, the project was on budget for design, manufacture and installation. As CBSF Inc. continues to work with Westburne to implement more of these concept stores, we continue to value engineer to be more cost effective.

**Lessons Learned**
From the perspective of the retailer, partner selection is key. Westburne credits the continuity CBSF Inc. was able to provide in doing the research, designing the retail environment and manufacturing all retail elements in house as an invaluable benefit to them as a retailer. Westburne appreciated CBSF Inc.’s flexibility, team work, and ability to create practical solutions that look great and don’t compromise on capacity or operations.

From the perspective of CBSF Inc. the customer service they provide their customers – the retailers – is key to enabling retailers to move through a redesign process. Any redesign process, regardless of scale or definition, can seem daunting and expensive to most who aren’t familiar with it. It can be a great expense and a risk for retailers to move through change so transparency is key.
Calculating ROI

ROI Calculation is Not Widespread
While ROI may be important as a desired metric, few respondent companies actually calculated it. ROI, when calculated, also varied among all the respondents regardless of company type. Answers ranged from payback on capital investments, to energy savings and customer feedback.

Those who do calculate ROI, however, do it consistently; the majority of whom calculated it on all their projects. While desired ROI outcomes vary among groups, one aspect was consistent among the three: the typical timeframe for calculating ROI was relatively short term (more than 1 year, but less than 3 years).

Shop! found that 60% of retailer respondents calculated ROI on a store redesign. Only 27% of the designer respondents calculated ROI on a store redesign, and 19% of manufacturer respondents calculated ROI on products sold for store design.

ROI is greater when a holistic approach is taken. When the motivators are focused on subjective as well as objective goals, the scope becomes robust and impacts more customer touch points, resulting in a cohesive in-store experience that inherently reaps tangible results.

While objective goals of overall sales and in-store traffic continue to be of high importance, more subjective goals of brand perceptions and shopper engagement are undeniably proving to hold significant value as they often drive overall sales, albeit less directly and immediately. The power of “buzz,” online reviews, bloggers, and others are highly influential, whether positive or negative. The store experience is a key touchpoint that can create passionate brand advocates, or detractors.

“*It’s impossible to know how long a redesign will last. We used to believe seven years, but now we are looking at five. Maybe this too will change soon, but if so, we need to really look at how to assess ROI and our whole way of what redesign looks like.*”
— retailer

KEY LEARNING:
Given the importance of ROI for retailers in evaluating store design success, designers and manufacturers must strive for the same metrics. Tangible impacts on sales/profits, foot traffic, and conversion rates are important, as are less tangible impacts on brand perceptions, loyalty, shopper engagement and experience.
The Raymond Group is one of India’s largest branded fabric and fashion retailers with over 700 stores in over 200 cities. As a leader in luxury textiles and made-to-measure mens tailoring, Raymond was looking to expand into the ready-to-wear category. After closing all its existing stores due to lackluster performance, Raymond turned to Gensler to assist in crafting its ready-to-wear brand story and creating new concept prototype stores.

**Design Elements**
A key component of developing the store design strategy was a focus on market research and consumer insights to refine the brand story, define the customer journey, and identify key storytelling moments, leading to an innovative concept addressing the modern Indian male. Given the enormous brand recognition for its textiles and custom tailoring, the challenge was to leverage the brand’s strengths while appealing to a different target audience and avoiding brand confusion. Purposeful curation of merchandise, “dioramas” that styled the latest fashions, attentive service evoking the tailoring experience, and seamless technology enabled a customer experience that combined the convenience and speed of modern shopping with the high touch of a personalized, bespoke encounter.

**Outcomes**
The results were literally award-winning, with several industry awards since opening, but most importantly, they exceeded business objectives.

**Key Metrics**
The client measured success in terms of store sales, footfall, conversion rates and media “buzz”.

The project resulted in:
- Product sales increase of 25%
- Conversion of footfalls of 80%
  (industry avg. ~60%)
- Average Bill Value up by 50%
- Setting of retail benchmarks in Bangalore
KEY TAKE AWAYS AND RECOMMENDATIONS

The key to success is to align store redesign goals and objectives with larger client strategic objectives, company culture, consumer expectations and empowered resources. In addition, the research showed that strategic, differentiated, in-store brand positioning with clear goals provide an ironclad framework for success. Creating a relevant space that truly engages with the customer while elevating and building memorable in-store experiences, will set the retailer apart from the competition.

The factors influencing ROI on store design are multifaceted. There are tangible and intangible gains, measured through traditional and non-traditional metrics, supported by objective and subjective goals. The more holistic the approach, the more lucrative the results. Success is dependent upon the scope you are willing to embrace, the clarity of the goals identified and the steadfast commitment to achieve articulated objectives.

STORE REDESIGN

It is extremely important to outline and understand the metrics for success and outcomes based on the impact to staff, customers, and sales, as well as project costs. Often overlooked in the analysis is the employee whose productivity and customer interactions are also impacted by store design. Any challenges faced by store staff can ripple to the customer experience. Service interactions are a critical part of the store experience that must also be “designed.” Thus, staff should understand the impact to their operations with the new concept early on, be provided training and support to manage through any changes, and given the other tools to help them deliver the full sensory experience for shoppers.

MOTIVATING FACTORS

Designers and manufacturers need to better understand retailer motivations and budgets for a store redesign to help meet their core objectives. Clients typically come with a budget number in mind and some ideas on what they’d like to see. Be able to read the client as quickly as possible to determine if the budget or the ideas are what is motivating them – if it’s budget, then set expectations early on if their inspiration is not in-line with what they can afford; if it’s inspiration, then push to create something that will meet their expectations and not disappoint/restrict based on costs.

KEY SUCCESS METRICS

In this ever-changing landscape, ROI has become a continuous process rather than an annual one. The evaluation process itself needs to be more fluid and more focused to ensure it continues to advance the organization toward its vision and goals. These mid-course corrections also include more frequent competitive reviews. Those who aren’t keeping an eye on the industry changes and the competition will be leapfrogged. We have seen the recent flurry of downsizing and store closures and wonder what metric were, or were not, measured.
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ABOUT SHOP!

Shop! (www.shopassociation.org) is the global nonprofit trade association dedicated to enhancing retail environments and experiences. Shop! represents more than 2,000 member companies worldwide and provides value to the global retail market-place through its leadership in: Research (consumer behavior, trends, and futures); Design (customer experience design, store design, display design, fixture design); Build (manufacturing, construction, materials, methods, logistics, and installation); Marketing (in-store communications, in-store marketing, technology, visual merchandising); and Evaluation (ROI, analytics, recognition/awards).

For additional questions about the data or information contained in this White Paper please contact us at:

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