



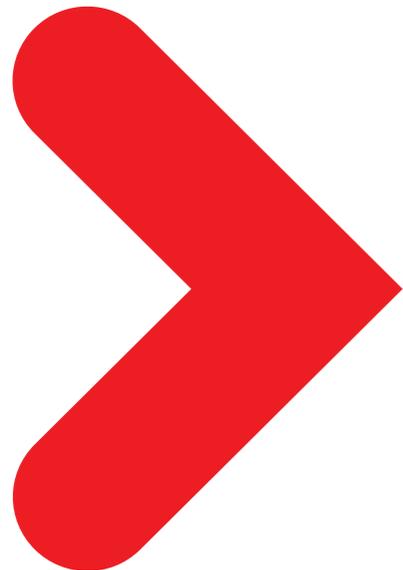
A qualitative research study

Understanding Online Grocery signage in retail.

 **express**

We're preparing to shift our marketing strategy by leading with PC Express, rather than with store banners.

To help inform this initiative, we want to know:



Do customers understand the service based on the content in the current signage?

Does the placement of retail signage affect our customers' awareness of the Online Grocery (OG) offering?

Our hypotheses

- > **Customers don't understand the service**
The content isn't providing enough information to help customers understand online grocery and inform their decision to try the service.
- > **Customers need to see value in the service**
On seeing the signs customers will only consider trying the service if the messaging resonates with their values.
- > **Customers have selective attention**
Customers tend to ignore (ad-like) signs, unless its closely related to their shopping goal.
- > **Sign placement affects the effectiveness on the customer**
Signage varies by store and some placements are more effective than others in getting customers to notice them.

**This is what
we want to
learn...**

- Do customers notice the signage?
- Can customers articulate the online grocery offering?
- Is the messaging connecting to reasons the customers might be persuaded to try OG?
- Is the messaging addressing the barriers to customers using OG?
- Which of the placements are more effective and why?
- Is the call-to-action effective?

Questions

This is what we did.

15
Customers
Interviewed

6
Stores
Observed



Loblaws

St Clair East

New store (PC Express brand) / walk up model

Maple Leaf Gardens

Underground Parking/
high impact

Leslie & Lakeshore

Traditional suburban
market style store

Fortinos

Oakville

Franchise banner
with untraditional
signage

Independent City Market

Yonge &

Lawrence

Small urban market
store with online
shopping struggling
to get traction

Superstore

Mavis Road

Discount store with
lower impact signage



Learnings



“How could I miss that?”

Customers are not typically noticing current signage.

Learnings

> Customers are task focused

When customers are browsing, they are selectively attentive to signage. They are familiar with our store layouts and are more task focused on finding the items they need.

“I tend to look at the food more than the walls.”

“I know where things are so i’m ignoring signs.”

“I only see signage at eye level.”

“I’m not sure it will actually save me time.”

Some respondents are skeptical of our core value proposition.

> Speed

Customers feel that the online grocery experience isn't actually faster than shopping in-store.

Requires planning

Respondents said online grocery feels like a planned activity. Not something that they can do on-demand.

Want delivery

Many respondents feel that if they can't do delivery, then they wouldn't bother with pickup.

Learnings

“Why is this going to save me time?”

“If i'm coming into the store I might as well do it myself.”

“I don't think the browsing experience is faster than in-store.”

“I need to know more about the process.”

Current signage is not helping customers understand the process.

- **Where do I get my groceries?**
Respondents were not always sure if the proposition is pickup or delivery.

Picking concerns

Product selection and freshness continues to be a concern.

Respondents don't seem to have trust in the people picking their groceries.

Cost & Availability

Respondents also mentioned wanting to know other aspects of the process, from cost to pickup times.

Learnings

“Will the products be sitting out?”

“I was always nervous they might mess up.”

“Tell me where to go to learn more.”

**“I don't equate
the word 'express'
to shopping
online.”**

**The PC Express
brand is not clear
to customers.**

- **What is express?**
Respondents associated “express” with a fast experience, but are not sure if that is related to pickup, their shop or an in store service like self-checkout.

Consistency

At certain stores there was a mix of banner messaging for Online Grocery and PC Express messaging.

Relationship to Presidents Choice

The brand is getting associated with other President Choice services that respondents have more exposure to (e.g. PC Financial).

“Express is it faster or something?”

“Theres a disconnect between Express and shopping.”

“It looks the same as the credit card messaging.”

Learnings

Opportunities



Align signage to the shopping journey

Target placements at idle moments in a customer's shopping trip.

> Checkout Placements

Respondents stated that they most often notice signage whilst waiting at checkout. We can capitalize on a key detractor of the retail experience by offering customers an alternative way to shop.

Alongside products

Customers may also be receptive to signage placed alongside the products they are looking for.

Parking Lot

Many respondents noticed signage in the parking lot while looking for a parking space.

"If I was waiting in line and saw that sign i'd be kicking myself."

"Any sort of signage at checkout is the best, that's when I most notice it."

"I saw it and it piqued my interest, this is new."

Highlight time saving features as a benefit

Give customers more insights into how online grocery can save time



Promote time-saving features

Highlighting time saving features like Quick Shop, linking PCO cards or picking up at spokes would make our value proposition more compelling.

Talk about delivery

For customers who want delivery, if we incorporate the delivery messaging (where available) we might convert store pickup detractors.

“I don't see the time savings with in store pickup.”

“I buy the same things, do I have to input that all the time?”

“Its more convenient if it is delivered to my house.”

Focus on the details

Help customers better understand the paradigm shift.

- **Show our dedication to the picking process**
Product freshness and lack of trust in pickers are the main barriers with respondents. How might we demonstrate the freshness guarantee and personal shoppers, to show our dedication to the customer experience?

Communicate our trial incentive

Promoting free month pickup in-store may also help customers who want a low risk way to try the service.

Help customers learn more

Directing customers to an informative place to learn more about the service, will help us answer their questions.

“No one has really explained it or mentioned it to me.”

“I understand the service more after reading the steps.”

“I'd have to try it and get used to it.”

Communicate consistently

Tighten up our brand platform when talking about PC Express.

> **Clear up the relationship between banner & PCX**

There is confusion over the shopping banner and PCX. The idea that banners offer online grocery makes sense, but they are not 100% sure what the PC Express brand is and how it relates to shopping that banner online.

Advertise the power of the platform

Be more persistent in promoting PC Express as our platform for online grocery. This may help customers see the range of options it offers them with the same quality they expect from their store.

Tell the story of PC Express

As a new service customers are making assumptions about what PC Express is.

“I don’t equate the word express to shopping.”

“I would think these are for the Mastercard.”

“Show me how its an express type service.”

Appendix



Shopping Habits

- Big shops
- Stock up for the week
- Shop 4 times a week smaller shops
- Shop twice a week
- Im here alot I live next door
- Usually once a week with my son
- family of 4
- Shop everyday because I don't know what I want to eat
- Shop once a week on weekend
- Shop multiple times a week
- Pretty much here everyday
- Not a planner need same day
- Live in the neighbourhood
- I swing by after yoga to pick up some bits
- Im nearby so stop on my way home from work
- Grocery routine is sporadic sometimes online or in store
- small to medium shops every other day
- Were amazon junkies - detergent garbage bags

Online Grocery awareness

- Aware of online grocery
- I have heard about it
- I have heard of PC Express
- "Only place I know of is Walmart" -OG
- We didnt think OG was much of a thing
- In the states they have pickup
- I havent taken the time to stop and read it
- No one has really explained it or mentioned it to me
- Havent tried OG
- I understand the service more after reading the steps
- Its not top of mind for me

Missing in store signage

I didnt notice the parking signs here

Didnt notice signage

I'm not that observant to signs

Just walked in didnt notice the signage

I only see signage at eyelevel

I tend to look at the food more then the walls

Didnt notice signage

Its not catching my eye

How could I miss that

I know where everything is didnt notice signage

I know where things are so im ignoring signs

When im looking around at whats instore im not noticing it

Its black and white and the picture is dark

Its blending into the environment - black pillar

Im looking for a special item and not paying attention to surroundings

Where customers have seen signage

We noticed signage on the picking cart

I saw it and it piqued my interest this is new

Noticed the signage outside parking

Drawn to PC Express sign

When im searching round the parking lot for a spot

I've seen the bags at the front of the store

Its marked on the spot

theres alot of signage everywhere at Kroger and Target

In michigan there is designated parking spots

How does OG work

What would make you consider OG

Is it going to be delivered or am I coming here

I assuming you order online and it its delivered to my house

You either come in or you get it delivered

An incentive would help me to try it

Time savings is important to me

points incentive

Everything has always been great

I would consider delivery

I have to think about it one day and try it

If my schedule was packed and I need alot of things

Would save the wait in the line

The convience is good for me

If I had kids I might use it

Loblaws was the more high recommended

Are there better deals online?

I wish it could be alittle bit quicker - on demand

I need to be reminded to try

Id have to try it and get used to it

Convenience for me to pick it up on the way home rather then be at home for the delivery

I do the Target C+C because the lines in store suck

If I wasnt able bodied I may try it

Its more convenient to me as a mom

I would order organics because I know the prodcets well

I could be intiseded if I was in a hurry

Time savings is important im a slow shopper

If I encountered more lines that might persuade me

More control of time for pickup

What is preventing you from using OG

Skeptical of time savings

Why is this gonna save me time?

Theres a window of time to check their orders

I don't see the time savings with instore pickup

At this point in my life I don't see the value

Picking up instore never had my attention, why would I do that?

The commitment to come get it/need motivation

Im not sure it will actually save me time

I don't like the delay in picking stuff

It doesnt really make sense for me to go down to the store

Im making a commitment to picking things up

I buy the same things do I have to input that all the time

If i'm coming into the store I might as well do it myself

I don't think the browsing experience is faster then instore

"I see OG as more of a planned activity"

Prefer Delivery

I don't know if its pickup or delivery

If you can't deliver why would I bother

Its more convenient if it is delivered to my house

Cost

Id need to know cost

Id prefer coming pickup then delivery

Show me the cost

Delivery fee

Cost

I'm not sure if its more expensive or not

Product/Subs concerns

Are you testing/squeezing products?

Im concerned about the fresh products

Will the products be sitting out

I like to come in and pick my produce

Not comfortable about people picking my produce

The majority of my shop is produce

I was always nervous they might mess up

If I pick something bad its okay but if someone else does I won't be happy

I don't trust that the order will be right

Are you always assured products online

Would be helpful to know what happens when there is limited availability

The online browsing experience isnt accurate

Guarantee or compensation if something doesnt go right

Nervous that they might get the order wrong

In store exprience

I like the experience of being in the store

I like people, losing the personal connection

Maybe im more likely to buy something I wouldnt usually

I want to get out the house

I never know what I want to eat

I'm not an early adopter

Understanding of the process

I need to know more about the process

I wouldnt know the details of how it worked

What are the hours for pickup?

I looked into it didnt try it

Do they keep it refrigerated?

I would go to what I know which is walmart

Tell me where to go to learn more

Id have to stop and read

Brand observations

Express implies that its quick

show me that its an express type service

I don't equate the word express to OG

Theres a disconnect between Express and shopping

I would think these are for the PC MasterCard

It kinda looks the same as the credit card messaging

Express is it faster or something?

I can't see the 123 at a glance

Signage Improvements

A pamphet over the cash

Something on the receipt

A little bit more information underneath the text would be helpful

I would put it by the cashiers

"If I was waiting in line and saw that sign id be kicking myself"

Any sort of line signage is the best thats when I most notice it

Self-checkout would be a good location to see signage

I notice signage in the aisles by the products

Maybe if there was something at checkout I might notice it

The only thing people have spoken to me about is mastercard

Tell me when is the best time to pickup

I notice the pamphlets at checkout