

STORES

Spot the differ

There are still well-defined store design boundaries between the discount grocers and their mainstream counterparts. But things are changing. **John Ryan** reports from north London

Stare at the figures that come out month after month and there is little denying that discount Britain – or at least food discount Britain – is on the march. Between them, after a prolonged hiatus since their arrival, Aldi and Lidl appear to have got the measure of the market and are now established parts of the grocery panorama as they put on monthly increase after increase.

They seem to be on everybody's shopping list, from those intent on counting the pennies to the consumer whose natural constituency might normally be Waitrose.

The 'Primarni' effect, when the bottom and top ends of the price spectrum are teamed up by savvy shoppers has finally, it would seem, jumped the fashion hurdle and moved into food.

In part, that has to be because stores that were once labelled 'hard discounters' increasingly bear a resemblance to their middle-market counterparts. In large measure, the graphics and departmental segmentation that have characterised the efforts of the big four are now being aped, in selected in-store areas, by those for whom low price is the key element.

It still is, but now that Lidl and Aldi are upping their games in terms of offer and quality (there's some pretty good champagne at Lidl and if you want a passable boeuf bourguignon, look no further than Aldi), what is the future of store design?

It's a confusing picture and the point-of-sale material that is increasingly being used by the discounters would go a long way towards meeting muster in grocers such as Sainsbury's, Waitrose and Morrisons.

Also worth noting is the fact that Sainsbury's and Waitrose have been steadily increasing the number of 'value' lines that they stock. Meanwhile, Morrisons has vowed to beat the discounters at their own game.

It is also pertinent that when retailers such as Lidl start rolling out perimeter chillers that have internal LED lighting of the kind normally seen in posh organic food stores, once-well defined boundaries between food retailers' in-store environments are blurring.

There appears to be a measure of convergence as far as supermarket interiors are concerned and point of sale material is at the heart of that.



Discounters increasingly look like their mid-market counterparts

Supermarkets vs discounters

- In-store bakeries are key
- Wines and beers feature strongly
- Discount ambient food lags behind in terms of presentation
- Lidl uses humour and a strong graphics package
- Morrisons, Sainsbury's and Waitrose are all promoting value ahead of other in-store offers



To see more pictures of these stores visit Retail-week.com/spotthedifference



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Lidl, Camden Town

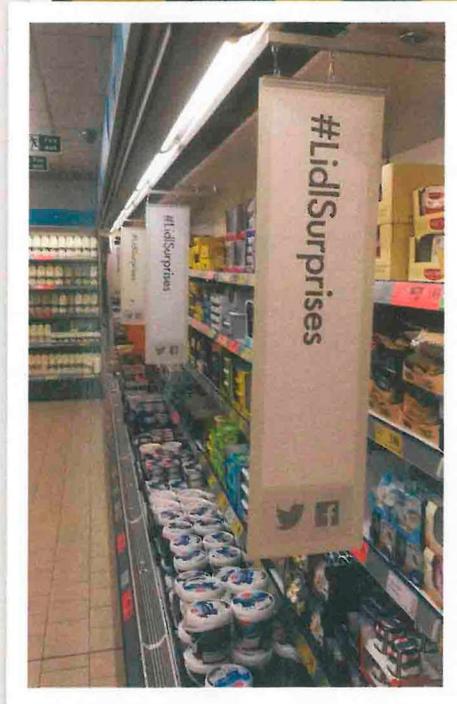
From the outside, this looks like pretty much any Lidl anywhere. Posters in the windows promote wine and champagne at prices that would put other retailers under pressure.

Inside, however, are a large number of elements that might be more readily associated with mid-market rivals. The first is the bakery section. Continuously replenished with an assortment of baguettes, cinnamon swirls and croissants, all baked in-store, this looks the part.

Chiller units around the rear of the shop feature 'wobblers' bearing the message '#LidlSurprises'. But it is the wines and spirits area that is the biggest surprise for the uninitiated.

Lidl has used paper designed to appear like rough, untreated planks that have then been applied to a standard display gondola. The bottles are in black plastic crates. The effect is almost as good as anything done by the big four. There is a graphic above it all with details of the masters or wine that Lidl has employed to keep the quality of the offer up to scratch.

This is a value shop, but a little like the newer and refurbished Primarks, those who are accustomed to mid-market store environments will not feel uncomfortable in this environment.



Waitrose, Camden High Street

The newly opened Waitrose on Camden High Street is on the site of a former Co-op, to which it still owes some of its internal geography.

In the window is a row of shoppers sipping tea, coffee and eating assorted cakes.

In front of the this there is an A-stand that has pictures of products which are part of the Essential Waitrose offer. Nothing so vulgar as a reference to specific prices is allowed to intrude, but the message at the top of the graphic reading 'Quality you'd expect at prices you wouldn't' makes the point clear.

Inside the store, the bulk of the point-of-sale focuses on the area around the cash desks, but there are signs above particular product areas.

While this is a store at the top of the mass-market value chain, its wine area could bear at least some comparison with Lidl, although its range is far greater.



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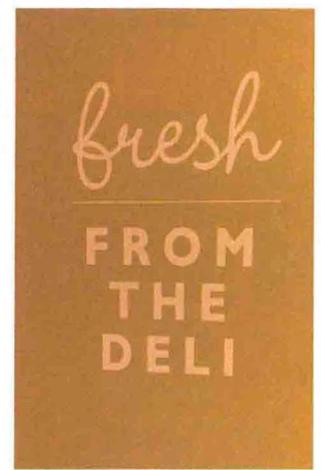


Aldi, Kilburn High Road

In many ways, the Aldi on Kilburn High Road measures up to some of the more traditional expectations of what a grocer should look like.

Its bakery section certainly hits the spot, with wicker baskets and a sign stating 'baked fresh today'. There is also the a fruit and veg aisle bearing the legend 'delivered fresh every day'.

But the row of chest freezers, topped by small upright freezers and surmounted by signs indicating the category they contain, is reminiscent of discounting of old.



Morrisons, Chalk Farm Road, Camden

Morrisons is going head-to-head with the discounters with its Match & More customer card, and the exterior of this store is festooned with posters proclaiming: 'I'm your new cheaper Morrisons'.

Morrisons is at a crossroads if this store is anything to judge by. It has a misting machine over the upscale fruit and vegetables at the front of the shop, not far from the point of sale that details all the bargains that are to be had. It wants to be a purveyor of quality, but also needs its low-price message to be hammered home.



Sainsbury's, Camden Road

Head for the frozen food area in the far reaches of this store and you could almost be in the nearby Lidl store. The upright freezers are internally lit by small LEDs and look almost identical.

However, what marks this store apart from the discounters is the use of counters with carefully designed graphics. Practically, that means deli, meat and fish counters, although the bakery area has similarities to Lidl and the Aldi store on Kilburn High Road.

As with all of the grocers however there is an emphasis on price as the big supermarkets slug it out with each other and the discounters.

In Sainsbury's that equates to graphics of Lego-like figures set alongside red signs announcing 'great



offers'. That is coupled with the Brand Match campaign graphics at the cash desks.

This, as elsewhere, is an instance of a supermarket reaching down to retain shoppers.

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