Retail
Experience Index℠

2018 UNITED STATES

Gensler RESEARCH INSTITUTE

The retail industry remains in an unprecedented state of flux.

Stories of store closures seem to be near constant, and calls for “the death of retail” or “the end of malls” seem to happen every day. At the same time, a new wave of retailers—often with their roots in e-commerce—are investing in physical presence as their businesses expand and evolve. What’s becoming clear is that retail is far from dead. We are instead in the midst of a dramatic reimagining of the retail industry and a shift in both the purpose and the form of physical stores.

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Gensler's Experience Framework

Precedent research has proven the role that product, brand, and service quality play in creating a great experience; and a separate body of research also explores the role specific design factors play in the quality of an experience. These studies, however, are often limited to retail or consumer-focused environments, and do not offer a comprehensive picture of how the design and qualities of physical space are explored alongside other experience factors.

Gensler's Experience Framework seeks to fill that gap by exploring and codifying all the elements that build to create a great experience. We explored these factors across a wide range of spaces—retail, workplace, public space, and hospitality—to uncover both common findings and specific insights related to each type of place.

We organized all the factors that create an experience into four groups that serve as a framework for holistic discussions of great experiences: the intentions behind an experience, or our experience modes; the expectations a guest or visitor brings to that experience; the interactions they have while in the space; and the qualities of the physical space itself.

INTENTION

At the heart of understanding experience is understanding users' intention and mindset—from the decision points behind choosing a store to visit, to their goals and activities during that visit. Five core intentions, our "experience modes," offer a framework for understanding how users are engaging with stores today.

TASK

Task mode is when a user has something specific they are trying to accomplish. Users are typically very focused and direct.

Running an errand

SOCIAL

In social mode, people's main intention is engaging with other people. Social mode is frequently combined with other modes.

Shopping with friends and family

ENTERTAINMENT

Entertainment mode describes the moments when people are looking to be entertained and brought away from "everyday life."

Having fun

DISCOVERY

In discovery mode, people do not have a concrete plan. They are often killing time, and so are likely to wander.

Browsing to see what's new

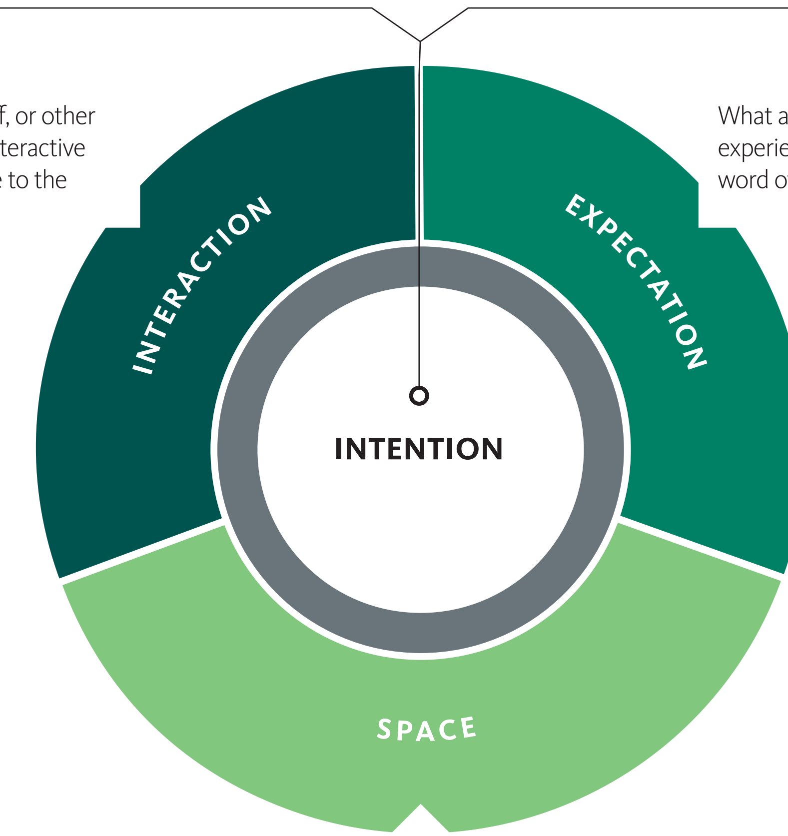
ASPIRATION

Aspiration mode describes the experiences through which users seek to grow, expand, or be connected to a larger purpose.

Seeking personal growth

Whether with technology, staff, or other visitors/users, the social and interactive experiences of a place are core to the overall experience.

What a user expects when embarking on an experience is often based on prior experience, word of mouth, or brand equity.



The qualities of the physical environment—from ease of navigation to materials, furnishings, and amenities—frame our experience.

Key Findings

FINDING ONE

The impact a store makes

Transactions can happen online, but emotional connection and engagement are best built in person. Brick-and-mortar stores offer an opportunity to humanize brands and create community, while also promoting and highlighting product quality and value in a way online retail still cannot.

FINDING TWO

It's all about the journey

Understanding and designing for the whole journey, and creating memorable moments that inspire and engage, are the foundation of great customer engagement. A unified and seamless customer journey is imperative—customer touchpoints should be additive and aligned.

FINDING THREE

Every move counts

Consumers are armed with more information than ever today, and their expectations have never been higher. They expect in-store content, products, and technology to be fresh—and their experience suffers if they think it's stale. For optional items like curated content or interactive technology, if you cannot keep it up to date, it's probably not worth having.

FINDING FOUR

Embrace the blur

Retail spaces today are accommodating a wider and wider range of activities—and those that do are the most likely to offer a great experience. Stores can take lessons from great public spaces in this regard, which currently support the widest range of activities and offer the most highly rated experiences.

FINDING FIVE

Experience at any age

A focus on Millennials may be sacrificing the experiences of older generations. Shifts toward more nuanced forms of customer profiling and engagement, and exploring new ways to save customers' time and effort, can improve experiences for everyone.

FINDING SIX

Shopping is still shopping

Ultimately, great experiences and "wow" moments only work if customers' basic needs are met: intuitive navigation, easy checkout, lighting and product display, and great staff are all baseline. Unfortunately, many stores today are still missing the mark.

The impact a store makes

The purpose of physical stores has shifted to engagement and connection.

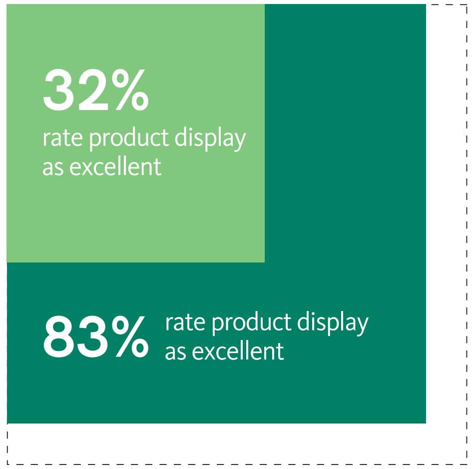
The bottom line: stores offer a platform for physical connection that online shopping cannot. In-store experiences create emotional engagement and connect customers to a brand's larger purpose or mission. The importance of in-person connection goes beyond just brand community, though. Retail stores also offer a forum where shoppers can connect with other people (friends, family, or even strangers), and engage with products in a way e-commerce doesn't allow. In fact, the nature in which a product is displayed, the design and organization of the overall store, and the authenticity of the store's design to the product being sold, all have a significant and quantifiable impact on the quality and value a person will attribute to that product. Great stores can make products appear to be made and function better; minimal stores or stores that appear "un-designed" can make customers think they're getting a better value.

SURVEY INSIGHT

DESIGN IMPROVES PERCEIVED PRODUCT QUALITY

Ratings of product display by users who see products as high quality vs. those who see products as poor quality.

People who rated product quality high
People who rated product quality poor



CUSTOMER INSIGHT

Customers read a lot into how a store is designed, and how that design relates to the value proposition of the products being sold. One ethnography participant, while visiting a Costco, noted how the utilitarian design meant they were getting a better deal.

C&A, Belgium | Copyright: C&A

Visitors to the new store noted the improved quality of products shown, but the products themselves hadn't changed. **The design and organization of the new store elevated the look and feel of the products.**

KEY FINDINGS

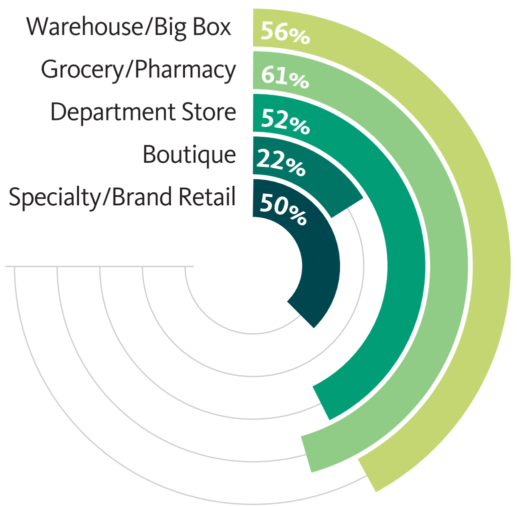
It’s all about the journey

To customers, online and in-store experiences are just different touchpoints for the same brand. Many people research online but purposefully buy in store, and also the converse—browse in store and shop online. When set up correctly, a brand’s various touchpoints with its customers complement each other—together they form a common thread of experiences across platforms. Creating memorable moments at every touchpoint is an opportunity to inspire repeat business. People who return to places time and again are often looking to re-create particularly memorable or positive moments from the past. Past experience or knowledge of a brand is frequently noted as the primary reason why people say they chose to visit a particular store. Multiple participants in our research noted specific past experiences they sought to re-create as the reason they loved a particular place.

SURVEY INSIGHT

PAST EXPERIENCE DRIVES FUTURE BEHAVIOR

Percent of respondents—by store type—noting the reason they visited a store as “they go there all the time.”

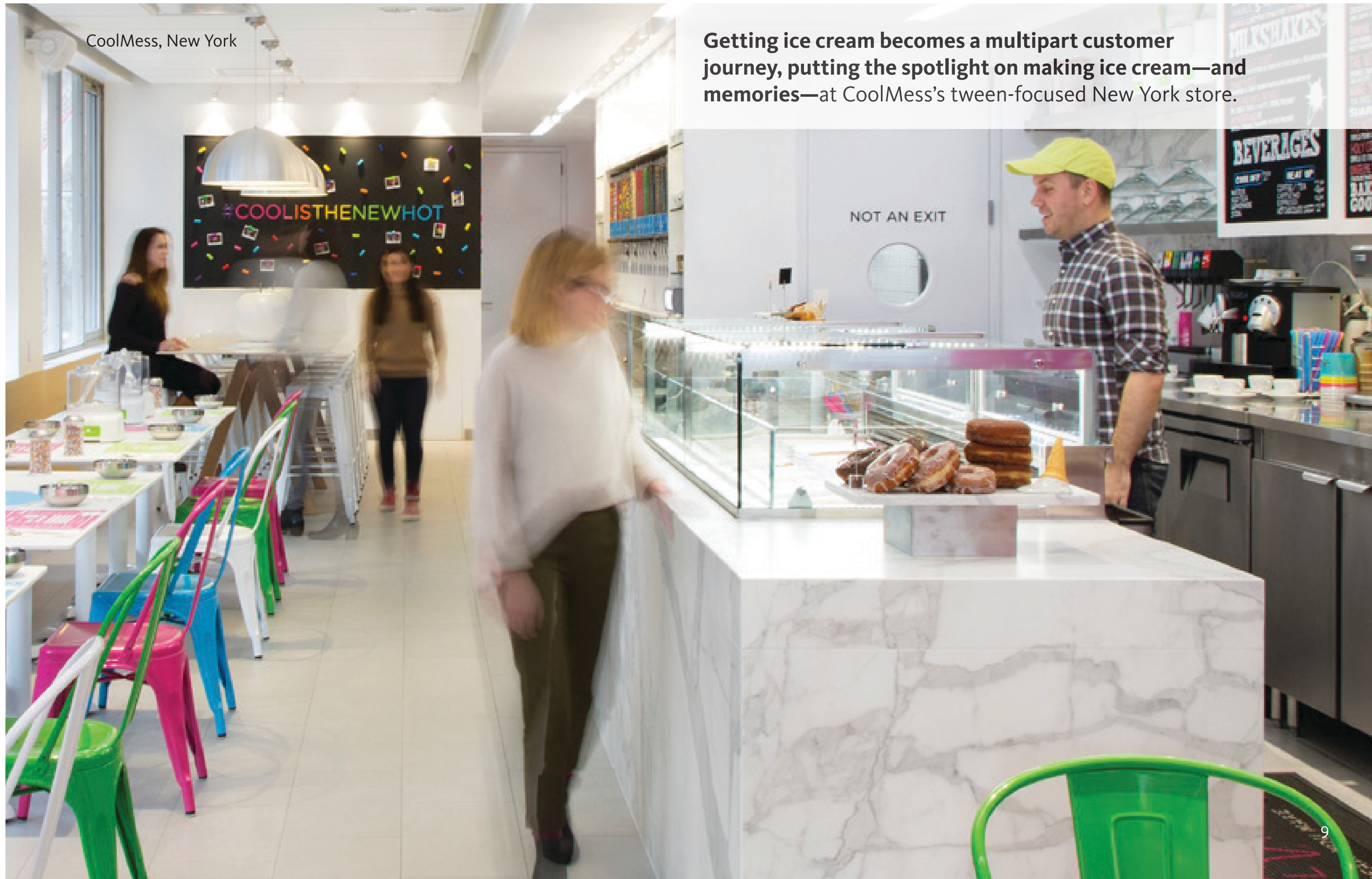


CUSTOMER INSIGHT

One ethnography participant conducted extensive online research to find the perfect handbag. Instead of clicking to buy, however, she made a two-hour trip to New York City to experience having it sold to her, and taking it home in the store’s iconic branded shopping bag.

Timbuk2 Prototype, Chicago

A new store concept expresses the Timbuk2 culture and values with a **focus on the end-to-end guest experience, allowing customers an opportunity to customize a product in store (to ultimately be made and shipped to them later).**



CoolMess, New York

Getting ice cream becomes a multipart customer journey, putting the spotlight on making ice cream—and memories—at CoolMess’s tween-focused New York store.

KEY FINDINGS

Every move counts

Habits and expectations built in an always-on, social media–rich world have permeated the in-store experience. As a result, customers are more attuned than ever before to what's changed and what hasn't. They expect stores to be employing/embedding the latest technology, and for in-store content to be managed at the pace of change they see in the world. Deploy technology carefully, though: technology for its own sake can miss the mark, particularly if content goes stale or doesn't help people get something done. Remember, cool tech isn't the only way to engage customers—finding ways to be more present and join their daily routines is just as powerful—whether by more, smaller shops outside of traditional shopping districts—or programming and curatorial campaigns that give people a specific reason to visit.

SURVEY INSIGHT

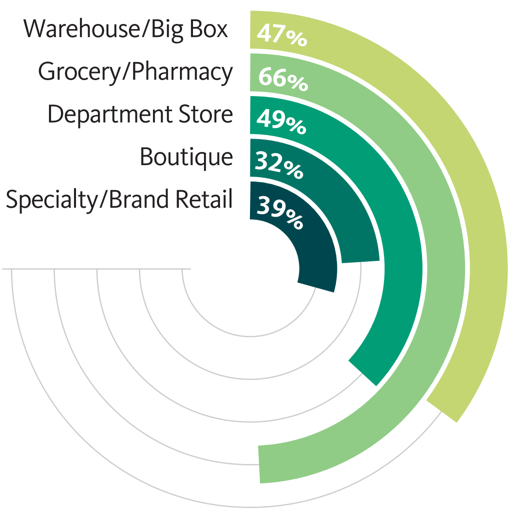
TECHNOLOGY FORMS A STRONG IMPRESSION

Percent of respondents who rated a store as having the latest technology who had a great experience.

- Places with the latest technology
- Places without the latest technology

THE POWER OF PROXIMITY

Percent of respondents noting the reason they visited a store was because it's close to their home.



Rotating content celebrated via **LED windows, a huge digital billboard, and a 32-screen "digital roundabout" engage shoppers** and keep them up to date on marketing campaigns and trends from around the world.

Primark, King of Prussia

Embrace the blur

Everyone is (and wants to be) doing everything, everywhere.

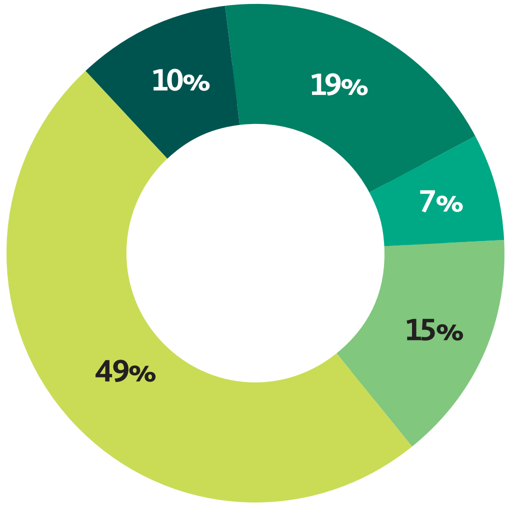
Our research uncovered five "modes" of experience—task, social, entertainment, discovery, and aspiration—that are at the heart of great experiences today. These modes reflect the myriad mind-sets with which consumers are approaching the world, each bringing different needs on behalf of the consumer. For example, only half of shoppers today are in task mode—and most of them are doing other things, too. With the rise in e-commerce, it's no surprise that the majority of retail visitors are there for reasons other than getting something done. Allowing shoppers to perform a wider range of activities also supports the bottom line: people who do activities beyond task are more likely to have a great experience, recommend the store they visited, and make a repeat visit.

SURVEY INSIGHT

THEY'RE NOT JUST THERE TO SHOP

Respondents' primary reason for visiting the store by experience mode

- Task
- Social
- Entertainment
- Discovery
- Aspiration

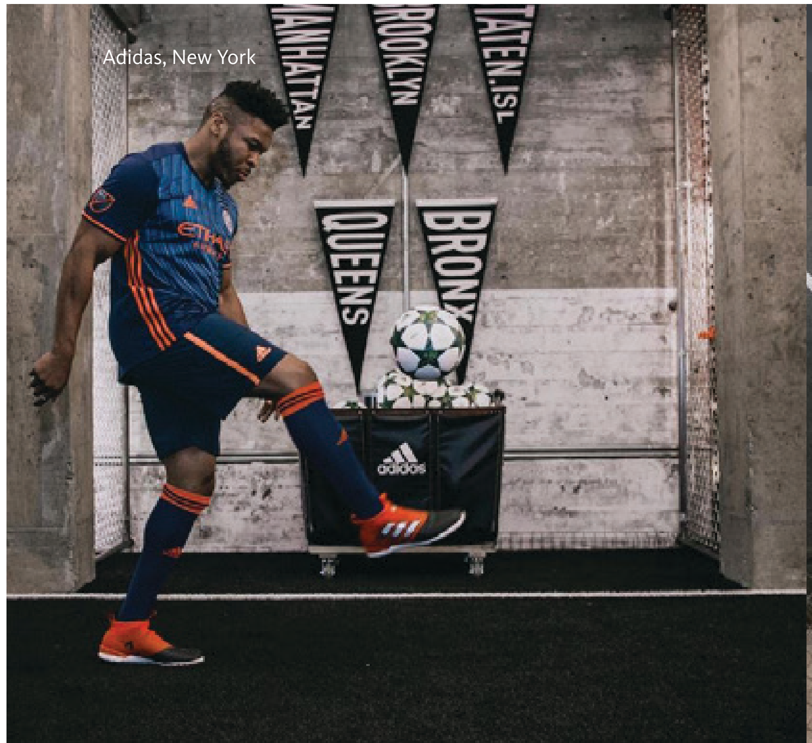


CUSTOMER INSIGHT

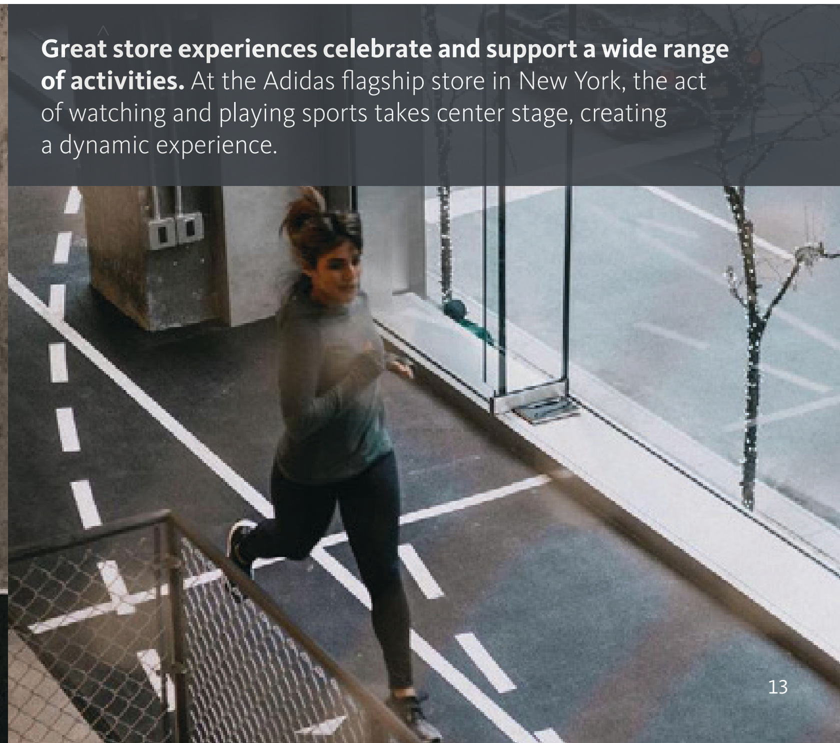
When asked about shopping preferences, one ethnography participant noted that she "loved" shopping with her mother and did so frequently. Except "when I need to get something done, then I would never shop with my mother."

El Palacio de Hierro, Palacio, Mexico

A dynamic food hall inside this department store provides a place all about socializing and hanging out. The result: longer dwell time and a space for customers to create memorable moments—ones they'll seek to re-create in the future via return visits.



Adidas, New York



Great store experiences celebrate and support a wide range of activities. At the Adidas flagship store in New York, the act of watching and playing sports takes center stage, creating a dynamic experience.

KEY FINDINGS

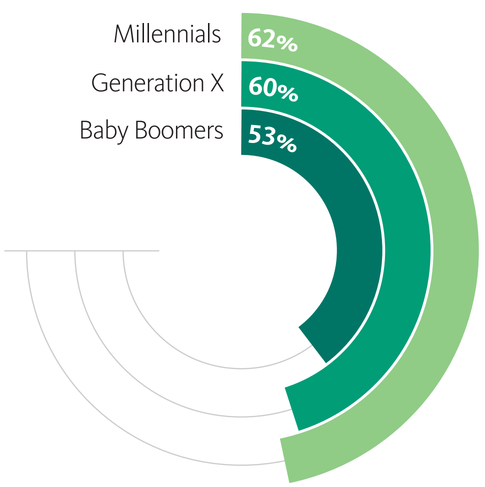
Experience at any age

The needs, expectations, and behaviors of Millennials are top of mind in the media and for many retailers for good reason. The generation of influencers and trendsetters represents a massive population with growing influence and buying power. But they're not the only ones shopping, and for older generations, experiences often miss the mark—experience ratings get progressively lower with age, with Boomers rating their experiences the worst of any generational cohort. One reason: shopping for fun is concentrated in younger generations, while Boomers and Gen X shoppers are more likely to be in task mode, even when making seemingly aspirational/luxury-focused purchases. Breaking older shoppers out of a task-focused mind-set—particularly since task mode experiences are, on average, the least satisfying of those we studied—is a particular opportunity for retailers.

SURVEY INSIGHT

EXPERIENCE VARIES BY GENERATION

Percent of respondents reporting a great in-store experience by generation.



MILLENNIALS ARE...

Frequency of experience modes in store, Millennials as compared to Baby Boomers.

2x more likely to be in entertainment mode

1.4x more likely to be in discovery mode

1.6x less likely to be in task mode

CUSTOMER INSIGHT

Even luxury shopping can be a largely task-focused activity, particularly for time-starved Boomer customers. One ethnography participant took us shopping for a new Range Rover, and was very directed in what he was looking for: service that would assist but not distract, and a dealership that would make car service easy and comfortable.

b8ta, San Francisco

A pop-up concept focused on highlighting projects that have rarely (or never) been featured in a physical store **lets customers test and experience new products directly, making complex technology purchasing decisions easier and more confident.**

Waitrose Cookery School, London

A cooking school extends the grocery-shopping experience to encompass a holistic experience all about food, deepening customer connections while building brand engagement.

Shopping is still shopping

Simplifying tasks creates goodwill on which to build broader emotional engagement. Help customers get something done and they'll have more time to browse, engage, and discover new things. Ultimately, it's about giving back time—whether simplifying checkout or moving the purchase experience more online to devote more in-store time and energy to a broader experience. That goodwill can come back in spades: give time back to customers, and they may just spend it with you. As online and offline continue to merge, where customers buy is less important than how they feel. People hate places that waste their time, but they love places that let them kill time they have to waste. Give them places to have fun, socialize, connect, and get inspired—and their business comes along with it.

SURVEY INSIGHT

GREAT DESIGN EXPANDS EXPERIENCE

Percent of respondents who do more than one activity in well-designed stores vs. in poorly designed stores.

Well-designed stores
Poorly designed stores

CUSTOMER INSIGHT

The right level of organization makes a big difference. One research participant noted that she likes to "rummage" but she hates to "search," commenting on the difference between an organized store that leaves space for discovery, and the frustrations of a truly disorganized place.

2x People who do more than one activity in a store rate that store as one of their favorite places nearly twice as often.

The HARMAN Store, New York

Creating digital and physical in-store touchpoints for customers e Harman product portfolio **creates an engaging, memorable experience that goes beyond just buying.**

CONCLUSION

Designing a complete experience

A great retail experience—like any great experience—is in the eye of the beholder. Customers take everything into account when they form their impressions of and connections to brands and places. The best brands and stores do the same, designing for a comprehensive experience that doesn't differentiate between the qualities of physical space and issues of service, technology, brand, product, or social media. That understanding is the crux of our Experience Framework, the result of 3+ years of research to document and explore all the factors that make a great experience.

Your customers' purpose should always be top of mind

At the core of our findings on experience is the power of intention—the foundation for our "experience modes." Understanding the purpose behind the customers' visit is paramount to delivering a great experience, no matter their demographic profile. Know when people are there to get something done, when they're there to connect, and when they're there for fun—then build on that knowledge to deliver something great.

Manage, then exceed, expectations

Before getting to the store, customers are already well into their journey. Managing expectations from the very beginning via the tone and quality of websites, branding, and customer recommendations sets the stage for how visitors will judge their in-store experience. Make sure to meet their expectations, then work on exceeding them with memorable, delightful moments that break customers out of the everyday.

Create spaces for engagement, interaction, and inspiration

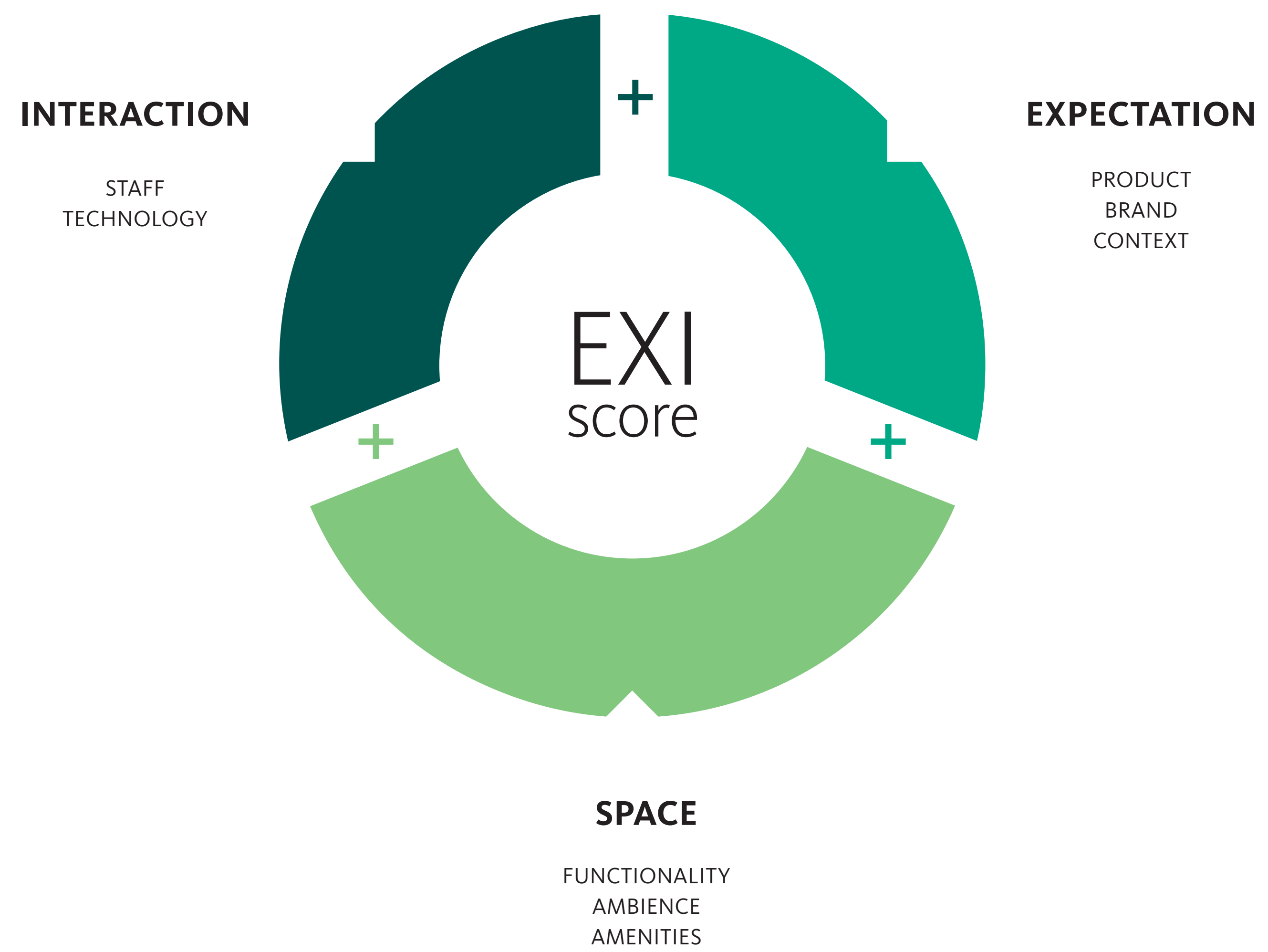
Humans are fundamentally social, and even when visiting for other reasons, the majority of store visitors reported some level of social connection during their recent retail visit—and those who reported that social connection were better off for it. The best store experiences offer places and opportunities designed for social engagement and moments that inspire and connect us to a larger purpose.

Design is the difference between good and great

The power of physical place to create a great experience cannot be denied. Stores are the platforms on which customers can interact with brands in a meaningful and engaging way. And in an age where differentiation is more important than ever, unique and authentic design features prove to be a key feature when the goal is standing out from the crowd.

The Gensler Experience Index℠ (EXI)

Gensler's retail EXI score represents an analytic measure of the overall quality of an in-store experience. The algorithm combines the quality of interactions, expectations, and the physical store to create a combined score that is statistically correlated to a great experience.



HOW DOES THE EXI SCORE WORK?

A store or portfolio of stores is given an EXI score on a 100-point scale based on responses to an online survey of store customers/visitors, and calculated using our proprietary algorithm. This allows us to benchmark the quality of a specific experience against average and great experiences across the United States. Additional detailed reporting provides specific insights into how experience can be improved in each area measured—interaction, expectation, and physical space.

A mixed-methods approach

The ***Gensler Experience Index*** is the result of a rigorous, mixed-methods research investigation that combined qualitative, ethnographic research—30 two-hour observations and interviews with people in five markets across the US to gather insights about experience—with quantitative research that included a nationwide, panel-based survey of 4,000+ US respondents. In addition, incidence and pilot surveys were conducted to prepare for the ethnographic and survey work. This mixed-methods approach allowed us to capture the stories and contextual insights that speak to user emotions, or the "soft" side of experience, while the analytics allowed us to confirm and enhance our insights through quantitative, statistical methods.

Phase 1: Roundtables

We began our research by hosting a series of roundtables with clients across five cities: Los Angeles, New York, San Francisco, Shanghai, and Washington, DC. Our goal was to explore what companies are currently doing to create great experiences, and to understand how we might better measure and track experience and its impact on business. Our results showed that experience means different things to different people, and that we needed to develop a common language around experiential elements. This critical insight, complemented by extensive secondary research, informed development of the methods used and the domains we explored to better understand experience and the role played by design.

Phase 2: Incidence Survey

To prepare for our ethnographic work and large-scale survey, we commissioned consumer research firm DYG to conduct a telephone-based incidence survey among a nationally representative sample of 1,700 respondents across the US. The survey was designed to provide insights about people's attitudes and feelings about design and its role in creating experience. It also helped us develop a common language and definitions that could be used for subsequent phases of our study. The effort resulted in the creation of demographic and psychographic profiles of populations—or personas—that could be classified as "design enthusiasts," and, at the other extreme, "design disengaged." These profiles helped guide our recruiting efforts for the ethnographic phase of our study.

Phase 3: Ethnography

Informed by the results of the incidence survey, we conducted an ethnographic study comprised of observations and in-depth interviews with 30 people in five markets across the US. Our researchers spent two to three hours with each participant, shadowing and interviewing them at a location of their choosing. Participants who were identified as either valuing design or not caring about design were recruited to understand sentiment at the extremes of our population. The ethnographies were conducted in the following markets: New York City, Minneapolis, Raleigh, Seattle, and Los Angeles.

In order to have a broad understanding of experience, we visited a variety of locations chosen by our participants, including cultural institutions, restaurants, hotels, retail stores, and train stations. By conducting interviews on-site, we were able to observe participants in the space, and could witness behaviors and discuss emotional reactions that influenced the experience. Sites chosen by users were places they felt strongly about—either positively or negatively.

Our ethnographic work uncovered three formative insights that are central to this research. First, the language most people use to describe design and experience differs significantly from the language used by designers: people speak in terms of feelings and emotional outcomes, not about specific materials or the design factors of a space. Second, the development of our holistic framework for experience—space, intention, expectation, and interaction—and the recognition that while the impact of each is distinct, to users they are combined and hard to distinguish. And third, that the intention behind an experience acts as a frame for the experience overall, which led to the creation of our experience modes.

Phase 4: Pilot Survey

Findings from our ethnographic work were translated into a short, online pilot survey sent to 1,000 panel-based respondents in order to test the experience modes framework and the language we used to identify the modes. The data was analyzed using factor analysis to ascertain the latent variables that relate to the different intention activities. Results determined that a) the experience modes and the variety of activities they represent do exist and are occurring in a wide range of spaces, and b) there are two latent variables related to intention: "task/goal directed" and "experiential focused" intentions.

Phase 5a: Analytic Survey (Structure)

Quantitative data for Gensler's Experience Index was gathered via an online, panel-based survey of over 4,000 respondents across the US. Responses were anonymous and the sample was managed for proportional representation across age, income, race/ethnicity, and geographic distribution.

There were four surveys in total, each measuring respondents' experiences in retail, hospitality, workplace, and public space environments. Each survey contained between 1,000 and 1,300 respondents. Retail respondents were required to have visited a retail store within the past three months; hospitality and public space respondents within the past year. Workplace respondents were required to work on a full-time basis, in an office environment at least some of the time, and for a company of at least 26 people.

Retail stores included a wide range of types: department store, warehouse store, boutique/independently owned store, big box store, specialty store, brand retail store, supermarket/grocery store, pharmacy, and museum gift shop. Public spaces studied were limited to outdoor spaces, including outdoor markets, town squares, public commons, plazas, parks, gardens, and landmarks.

Phase 5b: Analytic Survey (Analysis)

Stepwise multiple linear regression, a robust inferential statistical method, was used to predict different dependent variables, such as Net Promotor Score, on the basis of various independent variables related to different aspects of human experience. Through this technique, we identified the strongest drivers of three outcome variables: likelihood to recommend the space to a friend or family member (i.e., Net Promoter Score), exceeding expectations, and having a great experience. Among the independent variables studied were ones related to technological and interpersonal interactions, product, and place.

Various descriptive statistical techniques were employed to analyze the data, such as quartile analysis (comparing top and bottom 25 percent) and segmentation technique (top 2 vs. bottom 2 ratings on a 5-point rating scale). Analysis of variance (ANOVA) and t-tests were used to test mean differences between segmented groups for statistical significance. Correlation techniques were used to assess some relationships between variables.

To test the mode/intention construct, exploratory factor analysis was used to identify various dimensions among the variety of activities related to intention. We created some variables through data reduction techniques such as factor analysis and also tested them for both reliability and validity, ensuring high standards on both. Cronbach's alpha was used to determine the reliability of the Innovation and Autonomy Indices used in the Experience Index.

Statistical analysis was conducted in-house via Gensler's internal research team with expertise in data analytics, survey design, and data visualization. The survey's margin of error is 5 percent, a standard within social science research.

About Gensler

As architects, designers, planners, and consultants, we partner with our clients on some 3,000 projects every year. These projects can be as small as a wine label or as large as a new urban district. With more than 5,000 professionals networked across 44 locations, we serve our clients as trusted advisors, combining localized expertise with global perspective wherever new opportunities arise. Our work reflects an enduring commitment to sustainability and the belief that design is one of the most powerful strategic tools for securing lasting competitive advantage.

The Gensler Research Institute supports research investigations important to our firm, our clients, and to the ongoing learning and development of Gensler professionals. Research projects are practitioner-led with involvement across the globe. Our teams bring thought leadership to the table as we seek to solve our clients' and the world's most pressing challenges by creating high-performance solutions that embrace the business and world context in which we work, enhance the human experience, and deliver game-changing innovation.

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