



Stepping beyond the mirror

An international study into the shoe shopping experience



Séissmograph 2016

Séissmo has created the Séissmograph series, an offering of annual reports on various topics.

The series not only embodies our **passion for empirical research** and **societal phenomena & trends**, but also creates a **platform for methodological proof-testing and freedom of discovery**. We embark on a topic without knowing what we will find or what we should pay attention to. This provides our junior researchers with an opportunity for trial and error while the most experienced team members are able to sharpen their tools. Thanks to our clients who enable us to maintain our economic health, we are able to self-fund these studies as a part of our own R&D and contribution to a better understanding of the consumer climate.

This year, we provide **insights into the user and shopper experience** – which in this case happen to strongly differ from each other. You'll be able to understand shops. We will give you an idea of how online and offline retailers respond to consumers' needs and desires and we will show you that the key to a better shopper experience lies not only in the design of a great shop, but also in the deeper understanding of the relationship between the user and the product (or service) plus the benefits they derive from it. Lots of our findings can certainly be translated into your industry. But first put yourself in these shoes. We would be pleased to work with you to adapt the research appropriately.

Séissmo – March 2016

Our key learnings in a nutshell

1

WOMEN LOVE SHOES AND BUYING THEM IS THERAPY

Just a cliché? We travelled across Europe to take a look into women's shoe cupboards and discovered a lifelong passion

2

MISSED OPPORTUNITY WINDOWS: SHOPS LACK EMOTIONALITY

Not all shop windows seem to mirror the enthusiasm and the passion we found within consumers' homes

3

REVELATIONS FROM INSIDE THE SHOPS: STRESS IS IN THE AIR

Roughly 30% of shoe shoppers enter the shop accompanied. They obviously need support, help and advice

4

VIRTUAL DOESN'T MEAN LESS EMOTIONAL: THE ONLINE PURCHASE

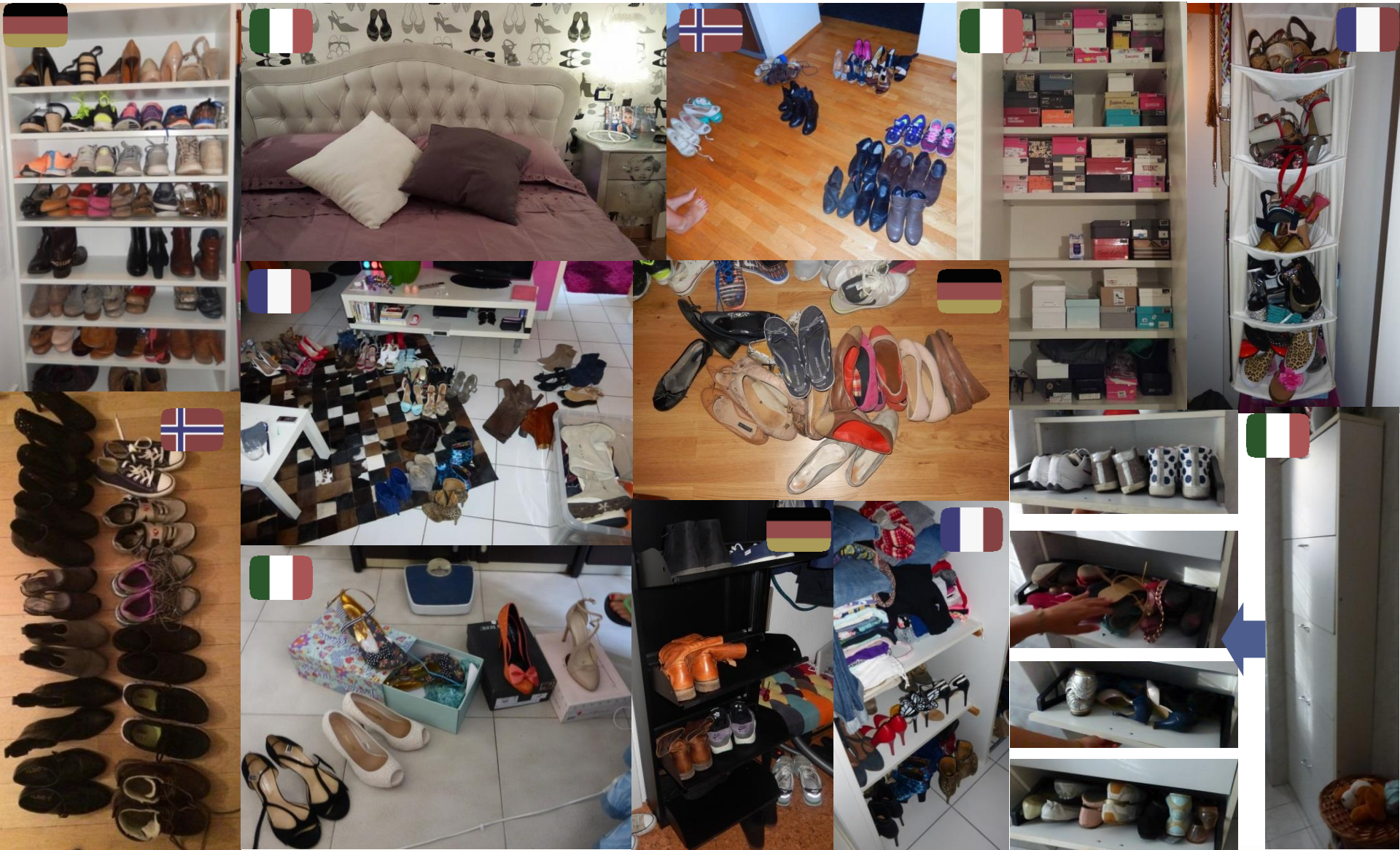
The gap is closed! Buying shoes online leaves room to fantasize and brings emotions to the foreground

1

Women love shoes and buying them is therapy

Just a cliché? We travelled across Europe to take a look into women's shoe cupboards and discovered a lifelong passion

"I didn't buy all my shoes in one day, I have bought them over the years and they are like an exhibition, they are a part of me"



Me & my shoes: A strong and emotional bond

DREAM

- ▶ A trigger for **fantasy** and **imagination**, that allows one to become a **child** again, allowing **freedom** and **playfulness**

EVOLUTION

- ▶ An element to **move** (forward) and **change** oneself, thanks to the **optical variety** one has at their disposal

IDENTITY AS A WOMAN

- ▶ **Affirmation** and **confirmation** of one's own sexual identity and **uniqueness**
- ▶ Useful element to strengthen **self-confidence** and **self-determination**

STABILITY

- ▶ A medium to **ground** oneself, therefore they are associated with **safety** and **comfort**
- ▶ Nevertheless, the **most beloved** are the most **painful** and **uncomfortable**, according to the adage "beauty knows no pain"

"at my parents' place I had a shoe rack in front of the toilet. Whereas people usually bring a magazine to the toilet, I used to open the shoe rack, look at my shoes and dream and put together outfits"

"I feel more self-confident, more assertive, more beautiful. I feel better!"

The healing/ therapeutic power of buying shoes

BEFORE THE PURCHASE

The starting situation is usually a **crisis** state, ranging among **boredom, nervousness, stress, demotivation, disappointment, frustration**



Emotions/ inner mood:

AFTER THE PURCHASE

The purchase of shoes is a **HUMOUR STABILIZER**: even in unpleasant situations, when the purchase act causes more stress, the possession of the shoes seems to **neutralize negative feelings**

"it is like opening a box of chocolates/ like a good meal, you feel much better afterwards"



The purchase of shoes:



Lack of success, need for achievement & reward

⇒ ...satisfies the **instinct of possession** and fosters **spontaneity**
"shoe shopping is like hunting"

Fear of monotony, desire to surpass oneself

⇒ ...achieves a **big change** via little effort/ object
"like going to the hairdresser, you've undergone a change when you leave"

Feelings of inferiority, need to reconcile oneself

⇒ ...works as a **difference leveler**, making women all feel equal, regardless of **change in weight**
"it doesn't matter if you've gained or lost weight, shoes always fit"

2

Missed opportunity windows: shops lack emotionality

Not all shop windows seem to mirror the enthusiasm and the passion we found within consumers' homes

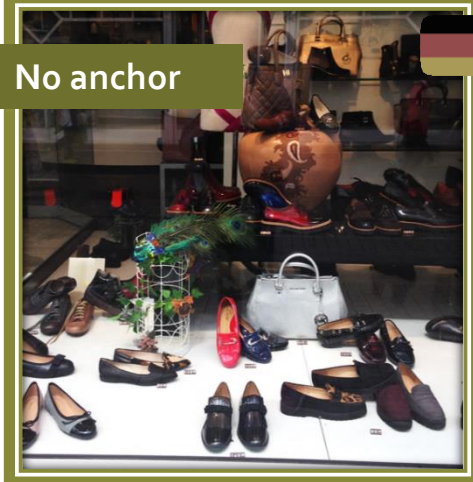
Inspiration is NOT everywhere



The standard shop window looks uninspired and uninspiring



- Do shop windows reflect the organization at home?
We are used to seeing shoes placed on shelves, like in closets
- Many shops do not want to break that rule. We face a systematic order – functionally clear – yet **boring** to look at
- Just as frequently, we find them somehow arranged on the ground – without a visual anchor – and they get **lost**
- The shoes might be interesting, their presentation often does **not** reflect a lot of **appreciation** or **imagination**
- In 80% of the windows, **bags** are presented with shoes – but in the same **arbitrary variety** – mutually unrelated - without a perceivable concept



Where there is inspiration, there can be confusion SÉISSMO

Shoes never walk alone!

In real life – on feet, on the street, at home in the closet – shoes come in **pairs**

Shoes are **oriented** (there is a front):

Mixing pairs and mixing directions requires **cognitive constraints** to re-organize the perception

Shoes are our connection/ **contact with the ground**:

Floating shoes leave the ground

Breaking the rules of shoe usage runs the risk of creating confusion

Confusion	Im-pairs (vs. in pairs)	Horror vacui	The flying shoes	Triads
	Mixed pairs keep the visual pair structure but double the amount of shown models	Chaos: the greatest number possible in the smallest space available	Disregarding gravity	Being the other way round as principle: 3 rather than 2, from behind
				

Invitation is NOT everywhere

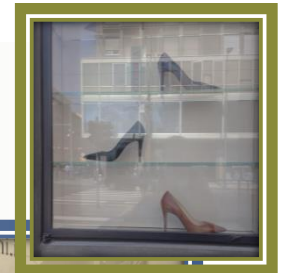
2 opposites in the role of the window:

50% of the windows showcase the shoes.

50% of the windows showcase the shop.

When going to extremes, neither philosophy is inviting.

- The museum:** an empty shoe pleases the eye. A plain white board is a perfect platform to make the shoes the centre of attention: certainly to worship the shoe – yet it might reduce the appetite for a transaction and intimidate the shopper.



- The depot:** complete view into the shop. Shoes are turning their backs on you: the outlet atmosphere of “public shoe storage” reduces shopping to bargaining.

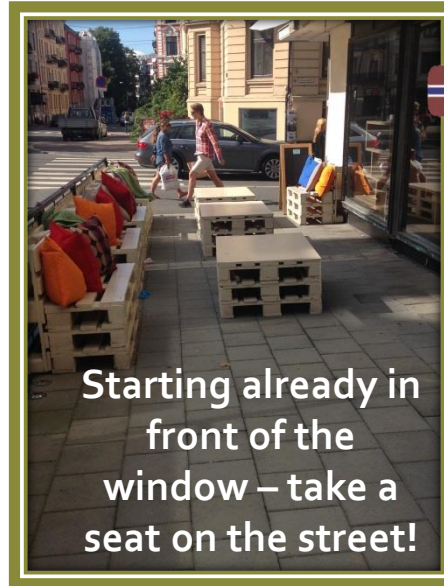
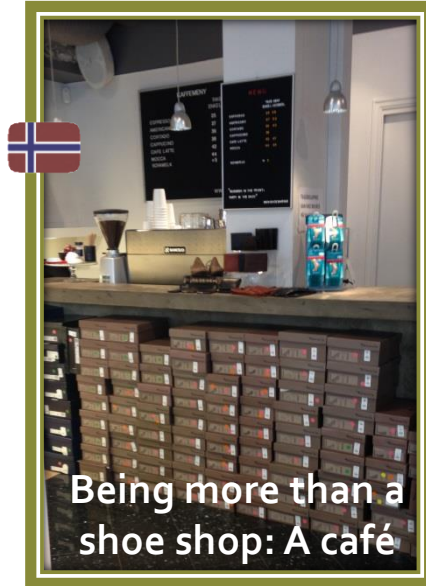


Can you have the best of both worlds?

- In France we find a lot of “split” windows. You can see into the depth of the shop with only the lower part decorated:
 An invitation to come in and find shoes.



Strategies to signal a warmer welcome



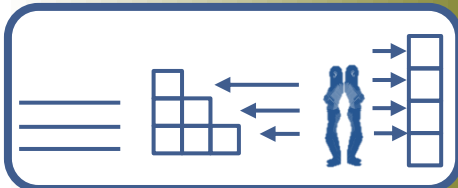
The digital era transforms our reading from horizontal to vertical: First signs of the digital influence in shops

From scanning to scrolling:

- ▶ A purely **horizontal** window presentation makes orientation difficult
- ▶ A stage/ **podium** with many levels emphasizes **3-dimensionality** and also creates a **hierarchy** (shoes in the first row...)
- ▶ Putting the shoes on a **vertical** shelf creates the same distance of pairs to the window shopper (**democracy**) – and is a step back into **2-dimensionality**
- ▶ A visual **grid** structure imitates the **online-shopping codes**



evolution



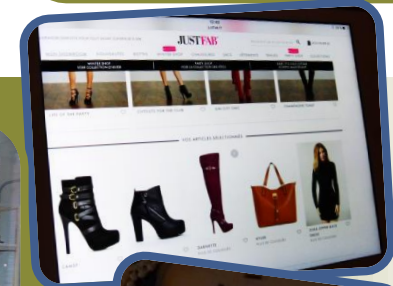
horizontal



podium



grid



...on display of our interviewees

3

Revelations from inside the shops: stress is in the air

It is striking that many shoe shoppers do not enter the shop alone: 30% appear in groups, more precisely IN PAIRS. Like shoes? No, they need support, help and advice.

The 3 Dyadic Systems We Met

We observed 133 people in groups, most of them in pairs. As we are trained behavioural analysts, we also took a glimpse at what happens outside the shop... and found many men waiting!



Man and woman

- He's suffering, bored, either passively or actively resisting
- She's leading, manipulating, using the saleswoman against him...
- Crisis management

Female friends

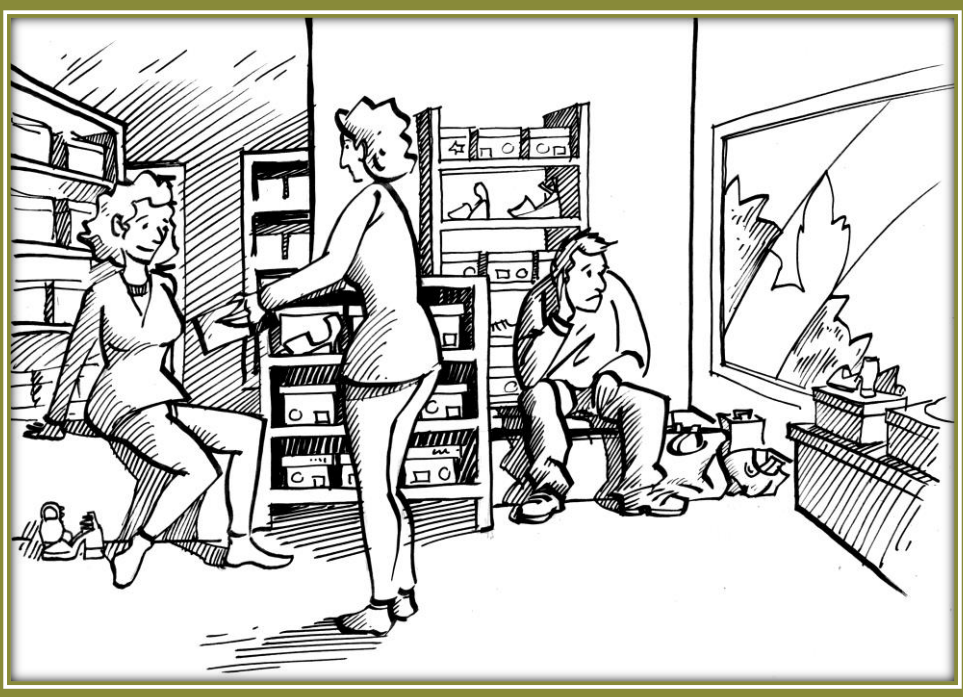
- They know each other well, value and trust each other's opinion
- Mutual inspiration and updates on what's currently "in"
- Socializing activity

Mother and daughter

- Mother often in the role of the decision maker, setting the rules of the game
- Combination can be found at any age
- Love and power

REMEMBER LAST TIME YOU WENT SHOE SHOPPING WITH YOUR PARTNER?

We have witnessed many “crime scenes”!



Country-specific difference: many „happy“ Frenchmen in shops who actively engage into the process and help their partner with suggestions and opinions

- ▶ **Case 1: It's for her (either in browsing mode or she is looking for a specific item)**
 - ▶ He is bored, passive, nervous, sometimes desperate; he follows her at some distance or sits down – in a victim pose – without an active role; ignores her and/or waits close to the entrance... in- or outside!
- ▶ **Case 2: It's for him (he always knows what he needs, never browses)**
 - ▶ She is dominant, uses the salesperson in her favour to push him into a choice he's not keen on
 - ▶ If he's into comfortable shoes, she wants him to look nice and chic; they basically have difficulty in agreeing on an item

Girls Just Wanna Have Fun

WANT TO SPEND TIME WITH YOUR BEST FEMALE FRIEND?

We have seen many friendships cultivated!



Age doesn't matter: friends can be teenagers, middle-aged or seniors... All seek comfort and enjoyment via togetherness – and all ages want to be fashionable!

Case 1: Targeted search

- Hard facts matter: size, heel height, type of sole, fitting...
- Friend helps to find and consolidate

Case 2: Browsing

- Fashion matters: it's about getting inspiration, looking out for new trends, updating one's fashion knowledge
- Friends show each other items, exchange opinions

- In both cases:** They enjoy spending time together! It's a cultural visit, like going to the museum or to the movies!

Mother Pays, so Mother Says...

AND HOW WOULD YOUR MOTHER BEHAVE?

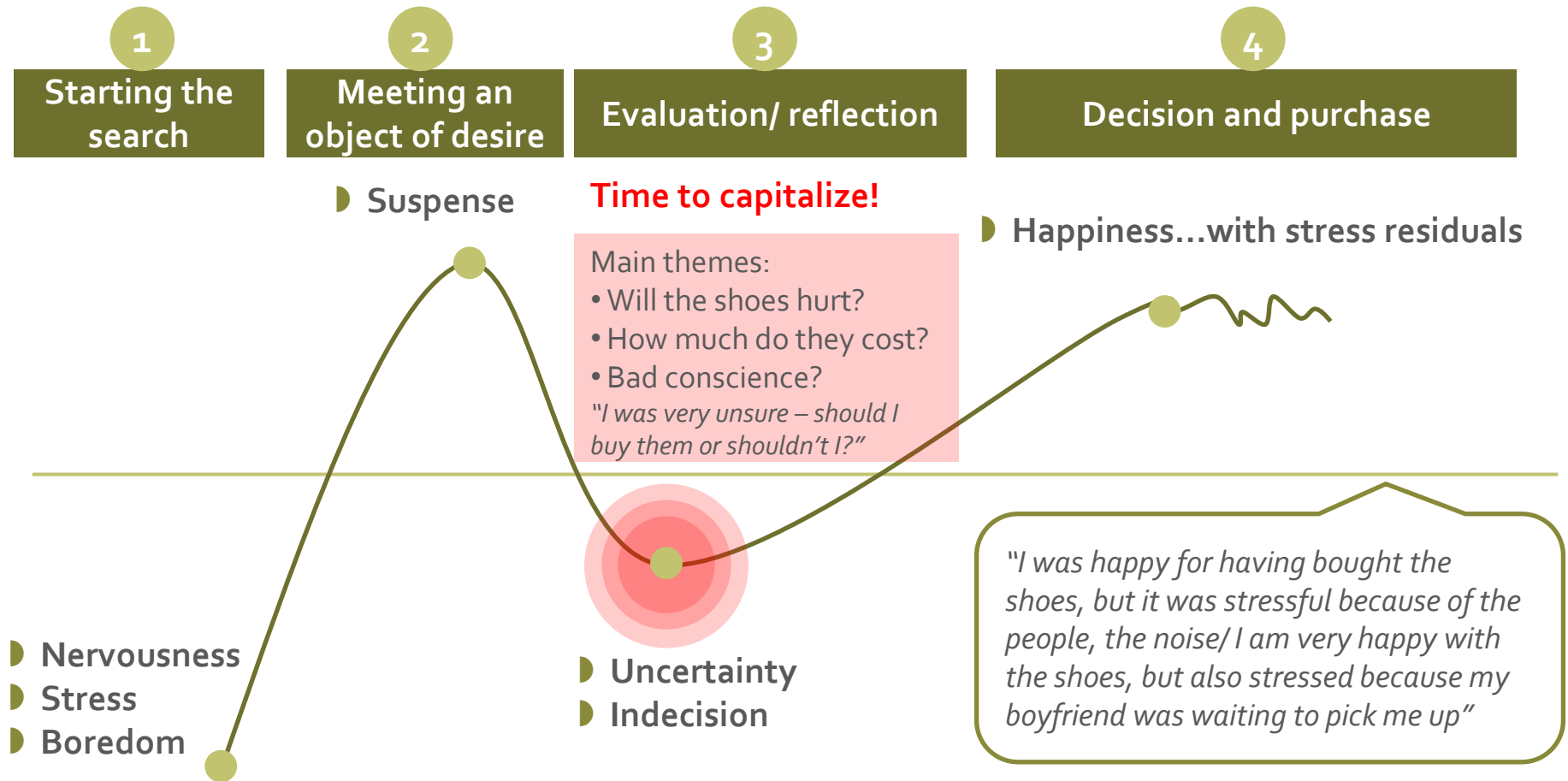
We have seen how quickly they take on a “mother role” and take control



- ▶ **Case 1: Most frequently, Searching Daughter and Judging Mother**
- ▶ Mothers will or won't consent, emphasizing the appropriateness (of the heel height, of the style), judging the taste and the personal fit – no matter what the daughter's age, the mother is quite patronizing!
- ▶ **Case 2: Sometimes, mother & daughter are in a browsing mode without hierarchy**
- ▶ Relaxed process, taking a look, rather in friendship mode, sharing their preferences and encouraging each other

***Age doesn't matter:** mothers can be very judging with teenage daughters or with 30 year old adult daughters...
A way for mothers not to age?*

Emotional journey in offline purchases: A short process with an extended evaluation phase



The offline purchase of shoes creates the perception of a short process, but the evaluation phase is long. There is obviously a lot of uncertainty, amplified by the somewhat straining and stimulating environment (other people, music, colours...) and the frequent presence of a companion. This leaves traces of stress behind, even after a successful purchase.

Husbands/ boyfriends intensify uncertainty and stress: Shops need to take care of them!

3

Evaluation/ reflection

Time to capitalize!

Main themes:

- Will the shoes hurt?
- How much do they cost?
- Bad conscience?

"I was very unsure – should I buy them or shouldn't I?"

*"I was very annoyed,
– Johannes was also there – you
start fighting just because you are
going shopping"*

*"I wanted to have a look
around but my boyfriend
didn't – he insisted on
leaving. I didn't have the
freedom to express myself"*

*"we are at the shop now
so find something' – you
are put under pressure
by your boyfriend"*

*"I was happy to be without my
boyfriend, because I need
peace and concentration
when I buy shoes"*

*"I was really stressed, because I didn't
want Fredrik to have to wait too long for
me"*

■ Uncertainty
■ Indecision

Despite the asset of being able to try immediately, shops lack elements of sensory awakening

Possibility to try the shoes on and immediately consolidate your decision

- ▶ Touch the material, proof of the **quality**
- ▶ Feel it for real, check the **fit** and **comfort**
- ▶ See the **appearance** on the foot

"you can feel and touch them to know if a leather imitation is good or bad for example. I can try them, so I know that they fit"

In reality, observation (and personal recall in interviews) reveal...

- ▶ **People do not touch the shoes a lot:** Not inviting? The senses are closed?
- ▶ **Deficits in lighting quality:** still too dark – or the light is too glaring
- ▶ **Acoustic desert or over-stimulation:** no music found in Germany; rather loud in other countries – rarely an element of cosiness and relaxation
- ▶ **And foremost: no scent!!!** Across 4 countries, we very rarely smelled the fragrance of leather!!! And no other types of fragrance at all. Remember what shoes used to be made of? Out of leather, conveying instinctive, emotional, wild connotations. The shops seem to have sterilized the shoes.

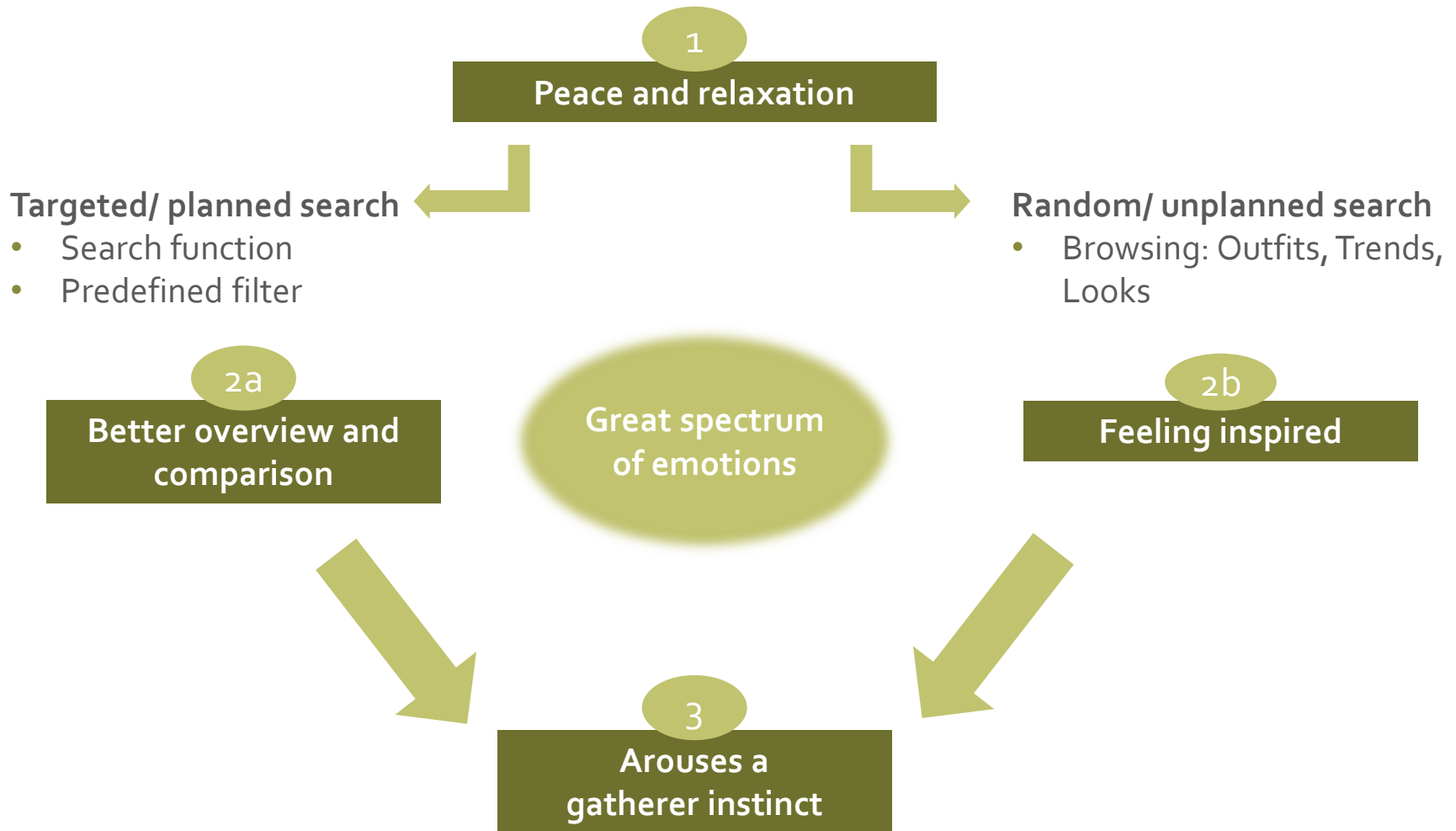
It seems that offline shops are underusing their own technical possibilities

4

Virtual doesn't mean less emotional: the online purchase

The gap is closed! Buying shoes online leaves room to fantasize and brings emotions to the foreground

The online purchase is a pleasurable experience



Peace and relaxation

A moment of being undisturbed

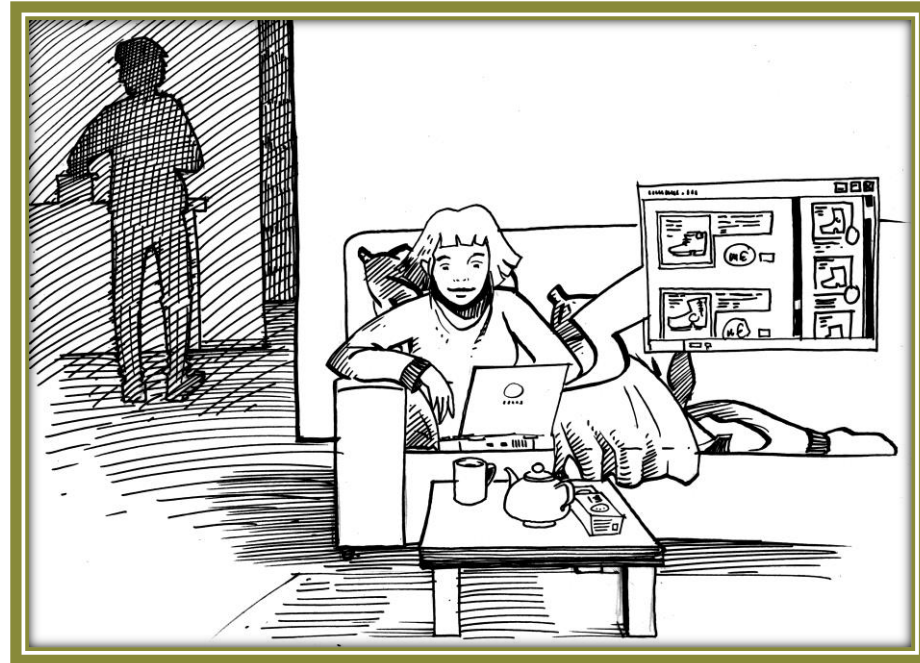
- Being alone with oneself, **taking your time**
- No impatient man** who is waiting/ is ready to leave the shop

A moment of ease

- Lying on the **couch**, **comfortable position**
- Before falling asleep
- To relax

A moment of enjoyment

- Feelings of **pleasure** and **amusement**
"I enjoyed it and had fun"

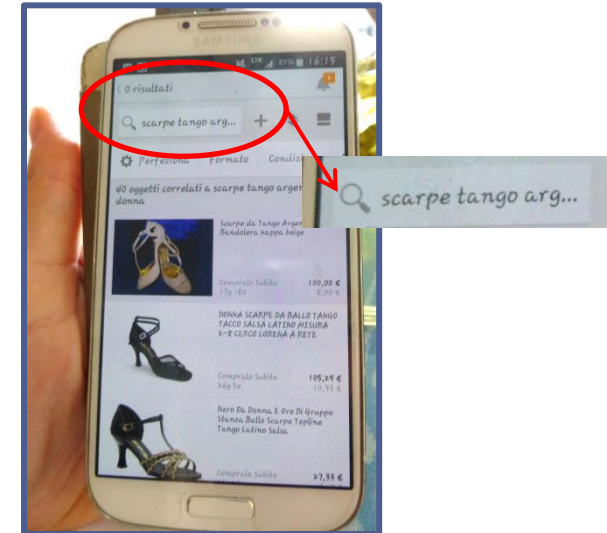


The retailer needs to build an atmosphere of well-being and peace by creating an incentive for the man who is often a disturbing factor

Overview and comparison

Search function

- Allows you to find an **exact type of shoe**, without the necessity to go through the whole offering: colour, height, material, brand...
"I am searching for 'brown low-heeled leather shoes' for example/ I entered 'Nike shoes pink'"
- You **only** get **those results** which are of **highest interest** to you → **less superfluous information** and more concentrated search and choice, which might lead to a greater prospect of purchase



Predefined filter

- Gives a **first rough orientation**: what does the shop offer, which types of shoes, which brands, which colours...



The vast choice of products can be organized and processed mentally

→ The retailer needs to establish a corresponding order

Feeling inspired



- ▶ **"Looks" and "Styles":** shoes are presented with an **entire outfit** → helps to **foster ideas of how to combine shoes**, what to wear with them
- ▶ Shoes are **shown "on the street"** which gives you an impression of **how they will look in reality**
"I look at 'Street Style' where you can see the shoes in action..."
- ▶ Awakens **desires and wishes** as well as being stimulating: That's how you could look!
"I look at the pictures and think: 'Oh that's a nice pair of shoes'"

Online shops are not a "standard" retailer but rather a personal fashion consultant
→ The retailer needs to bring the "street" into the shop

To buy or not to buy – and if so how many?

Scrolling through the products combined with the freedom of not having to make a decision at once arouses a **gatherer instinct**:

Accumulation of products in the shopping bag or on the wish list

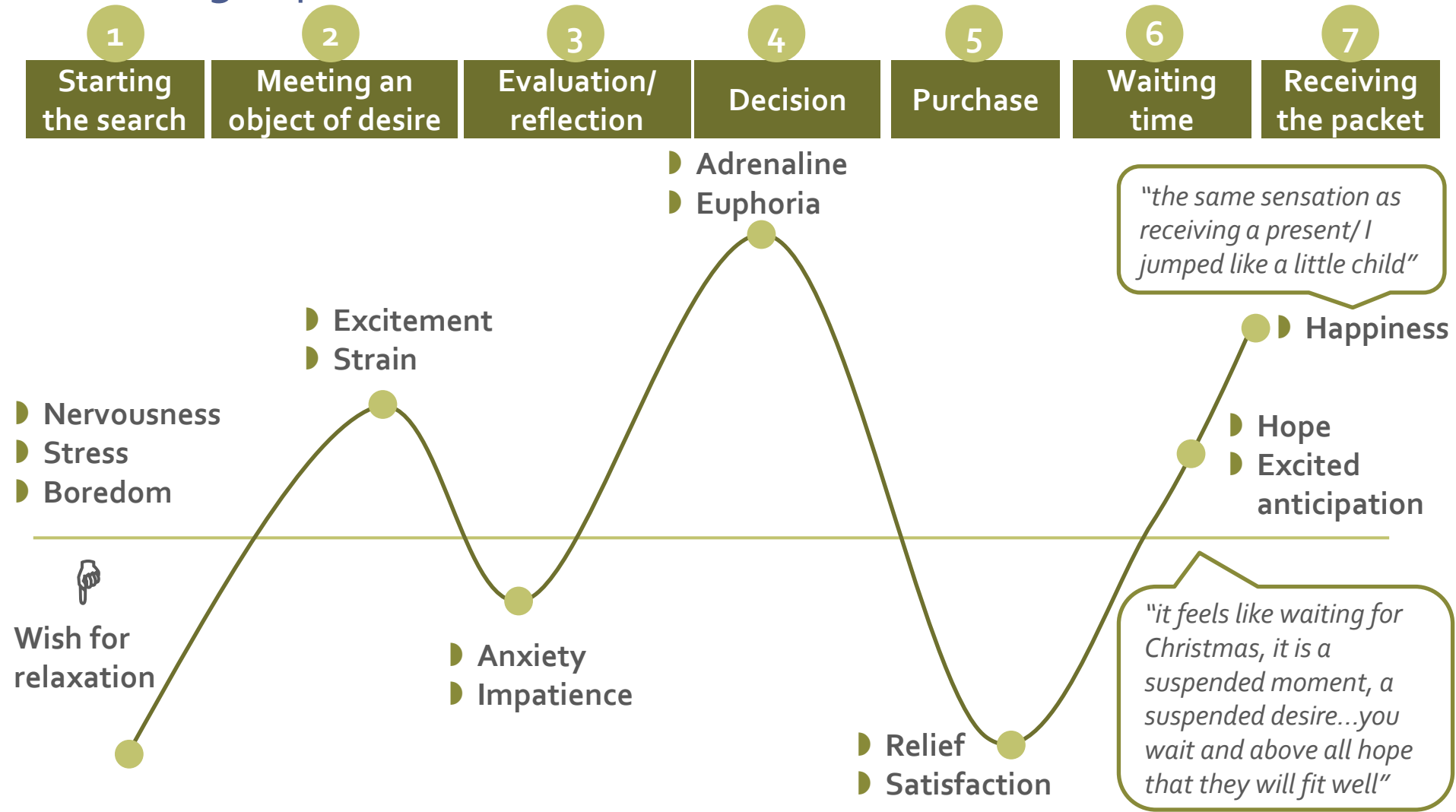
- ▶ In order to **keep products in mind** which you are not immediately convinced of or which you cannot afford at the moment
"I put them on my wish list to find them later on/ when I'm not sure whether to buy it or not, I put it here. Looking for an item I don't remember would be chaotic. But in this way I have my memo with the size"
 - ▶ **Compensation of fear**, that somebody else might buy the product (although they know that putting the product in the shopping bag does not prevent it)
- ➔ **The consumer is continuously reminded that there are products he or she once intended to buy that are still available**

Stimulation of spontaneous purchase

- ▶ By **browsing** through the shop they often find something **they don't need but want**
"I just saw these sandals by chance and they were so me! And that evening I put them on my wish list"
- ▶ Often **multiple pairs of shoes** (and clothes that make up a whole outfit) are bought as shoes seen incidentally also seem appealing
"but I also bought another pair because there were too many shoes I liked. It can be like a dizziness, I want to buy everything, I want to try on all the shoes"

The retailer needs to help people carry and collect shoes

Emotional journey in online purchases: riding a (positive) roller coaster



Buying shoes online leaves a lot of space for emotions, dreams and desires,
because the stress sources from outside are strongly reduced / no longer present



Food for thought

A toolbox to regain value in the offline channel

Invite

Work with sensorial stimuli

- ▶ **Use olfactory cues!** For instance spray a **fragrance!** The scent of leather, of new shoes like in new cars, of coffee and chocolate...
- ▶ **Use pleasant lighting!** Not too glaring on the one hand but not too dark on the other; consider daylight to allow for better evaluation
- ▶ **Allow for touching of materials!** Samples of material/ leather, colour selection like in furniture stores
- ▶ **Create a relaxing atmosphere via music:** not too loud, in the background to get the customer in a relaxed mood; silent shops are calm but also sterile, so a bit of softness

Make it a comfortable, homey, inviting place (also for men)

- ▶ **Create a men's corner!** With coffee, energy drinks, some snacks, Wi-Fi, Playstation, TV screens to watch sports according to local culture and events, news channels and economics, men's magazines....
- ▶ Integrate **big sofas** and chairs for relaxation
- ▶ **Encourage the duos and increase traffic:** obviously socializing in the shoe shop is a great thing to experience and having a trustworthy friend/ relative at hand helps in decision-making, so support the group dynamics, offer **ladies' drinks & special events**, ...

Organize

Arrange an order that is meaningful to consumers

- ▶ **Sort** shoes according to their **types and occasions of wear** : boots, ballerinas, sandals, going out high heels, business clean-cut heels, etc...
- ▶ Display them **vertically** in small quadrates, supporting overview when standing in one place
- ▶ **Reinforce style and fashion**: arrangement by style zones in the shop (street styles help to imagine the shoes in action!)
- ▶ Help people to **build a hierarchy**: show them your 10 bestsellers

Instead of selling, help them hunt & collect!

- ▶ Integrate (small) **shopping bags** in shoe shops. Multiple shoes are, unlike clothes, difficult to carry – a bag would allow for the collection of shoes while browsing through the store
- ▶ Offer **stickers** (or a digital button) with which people can **mark/ put options on the shoes** they want to try

Reassure

Offer more than a sales service

- Be a **friend**: ask what they like, what their style is like
- Be a **fashion consultant**: show them trends and looks
- **Reduce the pressure and uncertainty**: propose to reserve the shoes for some hours

Bring the street into the shops or make the shops also mentally closer to the street

- **Help imagine looks and visualize styles**: Screens with men/ women walking in shoes available in the shop, possibly accompanied by accessories; show more **posters of women that wear whole outfits**. This could add an inspiring fashion element and arouse desires and wishes
- Integrate **catwalks** in the shop and film how the women walk with their shoes. This gives them an idea of how they look in the shoes; For men, imagine a different setting to test their shoes
- **Encourage them to walk outside with the shoes on to try them**: allow them to check colour and “real” fitting in a hardcore test; reserve an area outside the shop with optimized pavement (an implicit hall of fame/ outdoor catwalk) and thus create free advertisement!



Research design and methodology

The Research

Fieldwork: **Italy, Norway, Germany and France during Autumn/Fall collection 2015;**

4 researchers travelled across Europe to observe the retailer and interviewed the consumers in:

- Norway: **Oslo**
- Germany: **Frankfurt** and **Munich**
- France: **Paris** and **Lyon**
- Italy: **Milan**

Our investigation:

- Compare **user** and **shopper experience**
- Which **unmet needs** can we identify both in **off- and online** shoe shops?

The research design (details next page):

- **Non-participative observation** of retailers (inside and outside the shops)
- **Semiotic analysis of shop windows** (mode of presentation, content, structure, allocation of space...)
- **In-depth interviews at people's homes**

The team:

- **Francesca Dandolo**, research set-up/ observation/ in-depth interviews/ analysis/ Italy, Germany, France
- **Susanne Faber**, observation/ in-depth interviews/ analysis/ Norway, Germany, France
- **Verena Weyl, Léonie Koch**, observation/ in-depth interviews/ analysis/ Germany, France
- **Rolf Dobler**, semiotic analysis of the shop windows
- **Marie Arbogast**, international fieldwork coordination
- **Natacha Dagneaud**, supervision

Special thanks to Michelle and our beloved JO!

Methodology

Module 1

Non-participative observation of the retailers at the beginning of the autumn-winter collection (end August/ beginning September 2015) → how is the new season being staged?

Targeted Shops:

- 45 shops in total across the 4 countries at different times of the day and week for a total of 133 people observed in full detail
- Generalist shops, no mono-brands, to reach an illustration that **mirrors local cultures**

Outside:

- **Shop window analysis**, with help of pictures and sketches of the shop windows and of the surroundings
- Output: **semiotic of the shop window**, the **dramatization of the shoes** in the context of the street

Inside:

- **Hidden observation** (movement, direction, body language...) and **listening** of the shopper, **capturing moments of truth**
- **Focus on duos / trios** to catch the **interaction** among customers in the shoe shops

Module 2

In home interviews with women (autumn 2015)

Target & sample:

- 8 interviews/ 2 women per country/ each 2 hours in length
- Buy shoes both on- and offline
- 18 + => able to complete the transaction

Methodology:

- **Ethnographic** part to explore the **relationship with shoes**, including pictures of the living context of the respondents
- **Cognitive** part to understand the **shopping process** (both off- and online) with focus on the emotions during the purchase process

Output:

- Personal **relationship** with shoes and **attitude** towards the category
- **Emotions** and **relevant factors** linked to the purchase of shoes
- **Perception** of the off- and online retailers

Thank you for your attention!



Séissmo – Markt und Forschung
www.seissmo.com

contact@seissmo.com

G7, 34

D-68159 Mannheim/ Germany

Tel +49(0)6217621230

