

••• shopper insights

The magic of tidying up today's retail landscape

Where KonMari meets shopper insights for the #win

| By Lisa Osborne



snapshot

Lisa Osborne looks at what researchers and retailers can learn from applying some of Marie Kondo's methods.

Cleaning and organizing has never been more popular, thanks to Marie Kondo. Kondo, and her KonMari method of tidying, is all the rage. Author of New York Times best-seller *The Life-Changing Magic of Tidying Up* and starring in her own Netflix show, *Tidying Up*, Kondo has built a following by helping others make over their homes, clear the clutter and live a more organized life. But Kondo's approach goes beyond mere cleaning tips and hacks. It's a philosophy grounded in Japanese culture built upon a fundamental principle of finding and experiencing beauty in simplicity and calmness.

While on the surface it may seem like just another "less is more" system, KonMari strikes upon the notion that we must be more selective in what we choose to keep and that we should keep only those items that spark joy in us. All the rest should be let go. In her book, Kondo writes, "We should be choosing what we want to keep, not what we want to get rid of."

As I dove into Kondo's philosophy and practices, the more common ground I discovered with the shopper insights work we undertake. The power of carefully curating a retail experience and helping shoppers more easily navigate and choose their shopping path remains an important principle to drive growth and improve customer engagement. We know from our work with both manufacturers and retailers that the days of near-unlimited assortment and boundless variety within the walls of a single store are fast fading. As Barry Schwartz laid out so well in his book *The Paradox of Choice*, too much choice for consumers, all at once, often leads to lower sales as they become overwhelmed and stalled in their decision-making. One could certainly argue that an abundance of choice is precisely why online retailers such as Amazon are winning but assortment is not the primary reason for their success. No, the biggest drivers of online shopping are functional benefits such as speed, convenience and low prices. In fact, our research has pointed to shopper pain points associated with the seemingly boundless set of options available to them online.



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How we got here

So, what is to be done and how can manufacturers and retailers move forward in the face of these trends? How can we, as shopper insights professionals, help our brands and clients make sense of it all? It appears we could take a page, or many pages, out of Kondo's approach to tidying up. Lessons are there to be learned and I'd like to lay out a few for you now. But before I jump to solutions, I'd like to first take a step back to ground in how we got here and what is motivating such a strong following for Kondo and the magic of tidying up she promotes.

Trend experts will point to the pendulum swing effect when we, as a society, respond to prevailing cultural, political and economic forces. When big shifts in consumer behavior occur almost inevitably there arises a counterforce that swings the pendulum back in an opposing direction. Kondo's popularity is an example of such a swing. For decades, unprecedented levels of consumer activity and increasing disposable income and consumer purchase power have prevailed. We buy a lot of things and accumulate a lot of stuff. The "more is better" mind-set has taken over and consumers are continuously upgrading to newer and shinier. For example, instead of fixing faulty appliances, we just buy a different one. Kondo's growing popularity stands out as a counterpunch against the mass consumption mind-set as it promotes a mindful approach where experiences and relationships are prioritized above things purchased and collected. And this pendulum swing is something that retailers need to pay attention to (some already are!).

Further justification for Kondo's method of decluttering can be attributed to the size of one's living space. In Japan, square footage is at a premium and many are living within a small footprint, particularly when compared to average square footage of homes in the U.S. This alone makes the KonMari method a useful approach as it confronts the reality of living well within a limited amount of space. Kondo offers that a smaller space with more curated joy-sparking objects is actually better for our well-being and happiness. It makes sense in land-precious countries and in urban locations. And,

this notion of "bigger as not necessarily better" also applies to today's retail landscape. Of course, big-box stores do exist. Mass merchandisers and warehouse club stores command large footprints to keep inventory of their huge quantities, family-size products and stock up staples. However, many of these same retailers are experimenting with small formats in order to better compete. They are "focusing on shrinking stores."¹

Walmart is building 3,000-square-foot convenience stores. Similarly, Target has announced plans for over a hundred smaller urban-format stores. IKEA and Nordstrom are also testing smaller showrooms. And, Amazon is planning for 3,000-square-foot Amazon-Go locations.² Technology to better manage inventory, order online and pickup (i.e., click and collect) is enabling the movement toward shrinking retail footprints. All of these tools are in service of the need to create a more tailored and convenient shopping experience, to pare down and make stores more accessible for today's consumer.

Avoiding nostalgia

Speaking of technology, let's take a closer look at Kondo's emphasis on avoiding the pitfalls of nostalgia. Although it is human nature to reflect fondly on the past, Kondo warns us not to wallow too long or too heavily in these feelings of nostalgia as it can thwart progress to declutter and organize. Author Justine Harrington outlined several lessons to be gleaned from Marie Kondo and one of these was avoiding the trap of sentimentality and nostalgia.³ Harrington writes, "Going down the rabbit hole of nostalgia can also just be a convenient way for you to procrastinate (yet again!) instead of cleaning – when possible, it's important to bypass nostalgia to figure out what you actually need and what items bring you real joy."

From a shopper insights perspective, this Kondo rule serves as a general watch-out to retailers to keep evolving or risk falling behind. In 2018 alone, retailers such as Sears and David's Bridal filed for bankruptcy at alarming rates. Shifting consumer buying patterns is the oft-cited reason for the retail downturn.⁴ I would take this further and claim many of these retailers simply continued to do business as they

had always done business, doing little to modernize their model or their merchandising. When retailers get stuck in the past and cling to their old ways of thinking, they die. Those experiencing success are embracing technology in new ways. They are experimenting and seeking ways to complement their physical store locations with a robust e-commerce business.

Pairing brick-and-mortar with e-commerce services plays to the unique strengths of each format. Shoppers can get variety and convenience through search and shop online while brick-and-mortar stores can be curated to improve shoppers' experience. E-commerce provides the functional benefits, leaving storefronts the freedom to tap into the emotional benefits of hands-on-discovery, treasure hunt, personalized service and try-and-buy. Eyeglass retailer Warby Parker is a great example of a successful omnichannel retailer. Warby Parker started as a digital retailer and, through its e-commerce model, changed the otherwise time-consuming chore of eyeglass selection into a fast and efficient process from the comfort of a laptop. In recent years the firm has added 70+ physical store locations to become a "click-to-brick" retailer with showroom capabilities for shoppers to have fun and experience the brand.⁵ Amazon is following suit via its acquisition of Whole Foods and experimentation with pop-up stores.

With the rise in online shopping, delivery and pickup or ship-to-store, e-commerce and brick-and-mortar are evolving into complementary tools and a way for the shopper to control their own experience. And, in keeping with Kondo's decluttering advice, retailers adopting a more omnichannel approach are clearly avoiding the nostalgia trap as they evolve and change to suit the needs of the modern shopper.

Fold, don't hang

Kondo calls upon her devotees to embrace a "fold, don't hang" system for their clothing storage. She suggests clothing is always "happier" inside a dresser drawer and even outlines a special folding technique called the vertical fold where you make a long rectangle with your clothing and then fold from the bottom into a small package.

The premise here is the ability to see all

of your items of clothing without the need to rummage through and dishevel everything.

Folding up for display instead of hanging clothing on racks has improved shopability within department stores and major fashion retailers as well. Our path-to-purchase and in-store shopper research has led us to conclusions and guidance for our retailer partners similar to the advice given by Kondo to her readers.

Crammed-full racks of hanging clothing do not invite the shopper to engage and browse. Instead, retailers are wise to move to wall shelving and freestanding displays where they can fold and stack, where they can draw the shoppers' gaze to eye-level or upwards and showcase their selection, reveal color and inspire outfit component mixing and matching.

And, you don't have to be a fashion retailer to realize the benefits of this advice. One of our non-clothing retailer clients was experiencing a slump in holiday sales on its giftable items. Our shopper research uncovered a store environment incompatible with the way in which shoppers like to browse and buy. Sight lines and displays were not conducive to the navigation patterns in-store and merchandise was primarily displayed on tables, taking the shoppers' eyes down where they would then miss additional products. Stock was literally buried and had no room to breathe and be discovered. A little "fluff and fold" guidance resulted

in some serious changes and improved sales in the next holiday season.

KonMari lessons for researchers

It's not just our brand teams and business partners who can benefit from an application of Kondo's teachings. As researchers and practitioners of the shopper insights arts (as I like to call them), we can also benefit from a refresher course in simplification and careful curation.

With almost endless quantities of data at our disposal and a wealth of research tools and methods at our fingertips, we may have a tendency to overengineer our approach to learning. For each shopper challenge or shopper question you face, consider combining the "what" of behavioral data to drive hypotheses around why shoppers are acting in a specific way or buying (or not buying) within a certain category.

It is critical to look beyond sales metrics to gain insight into the underlying needs and motivations of shoppers in the mode of actual shopping. Oftentimes, the best way to do this is to go old-school and engage shoppers in-context to observe and understand more deeply. While a 20-minute online survey with layers of advanced analytics may be useful to measure shopper behavior, the reality of this method, and many like it, is grounded in System 2 thinking. So many research methods measure the past and lean on shoppers to state and rate their path in a logical, rational and conscious way but

we know that shoppers do not necessarily approach shopping in linear and rationalized way. Instead their in-the-moment actions and ideas occur in a System 1 manner – fast, automatic and emotional.

Much like KonMari advocates a selective choice of items that spark joy, we as researchers need to curate our approach and focus on fundamentals of real-time shopper observation and inquiry to get the needed depth of understanding, in the store and at-the-shelf (or in the moment of online shopping).

So, let's follow Marie Kondo's lead and find joy in letting go of that which no longer serves us well. Let's get back to basics and choose to declutter our approach to insights so we can propel retail out of the nostalgic past and into a brighter, tidier future. 📌

Based in Seattle, Lisa Osborne is COO of Ignite 360 LLC, a San Francisco insights and strategy firm. She can be reached at lisa@ignite-360.com.

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