The Case for Studying In-Store Media

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Abstract:

The term "in-store media" refers to displays in retail establishments as diverse as supermarkets, department stores, and specialty clothing boutiques. In many countries these displays are becoming digital and interactive. They tie into people's hand-held mobile lives, transforming the ways retailers relate to one another and their customers. Yet despite these displays' longstanding and growing importance, media researchers have neglected in-store phenomena. Indeed, researchers' scant attention to this type of media has led them to miss out on fascinating developments with potentially important social implications.

This paper aims to encourage research on retailing by suggesting the utility of a media industries perspective. The framework points to the value of studying the production and circulation of digital and physical marketing materials that merchants use to target shoppers. Preliminary work from this viewpoint reveals new data-led approaches to customer relationships that raise questions about when and how retail-based media reinforce, extend, and shape anti-pluralistic, even anti-democratic, processes and perceptions.

Keywords: Digitization, Convergence, Marketing, Political Economy, Technology

An Overlooked Landscape

It has become a truism within communication studies and related fields that the rise of digital technologies is reshaping media industries. Researchers have fixed their sights on the profound changes taking place in the television, recorded music, movie, book, magazine, advertising, and newspaper industries.[2] Academics with an industry bent have also turned their attention toward the internet and mobile businesses to explore ways executives from those "legacy" industries use the new technologies to investigate more independent areas of the media economy. Scholarship from only the past decade has ignited important discussions of topics that hardly, if ever, came up in previous writings on media industries: privacy;[3] surveillance;[4] security;[5] piracy and fair use;[6] the audience as both producer and consumer of media materials;[7] the increasing quantification of data about audiences;[8] the implications of changing brand strategies and media subsidies;[9] and how in the face of new digital competition and capacities companies are redefining the scope, qualifications, and compensation terms of media labor.[10]

This research has led to a growing body of exciting work on the processes of media creation and distribution not seen since the 1970s and early 1980s, a major period for research on media industries. At the same time, researchers have shown almost no interest in activities, such as shopping, that take place outside businesses we typically think of centrally as "media." Retail venues have long presented visitors with a cavalcade of patterned materials about goods and services—product packaging, circulars, store-sponsored magazines, coupons, posters, shelf notices, floor ads, ceiling attention grabbers, shopping-cart advertising cards, end-cap display fixtures, video monitors, audio programming and announcements, computer kiosks, and more. Yet consider in-store media's infinitesimal footprint at the annual International Communication Association and the National Communication Association conferences from 2008 through 2012: Of the more than 2,500 presentations at ICA and NCA during that half decade, only eighteen papers included the words *supermarket*, *mall*, *retail*, or *outdoor* in the title. Moreover, only five of the presentations had title terms that evoked the more specialized, mobile-related aspects of retail: *GPS*, *geolocation*, or *geo-location*.[11]

The Social Importance of In-Store Media

This scant attention has led communication researchers to miss out on fascinating developments with potentially important social implications. Online sellers are becoming adept at tailoring product, price, and lifestyle offers to prospects based on what they have learned about them. Executives in physical ("brick and mortar") stores are also implementing strategic changes involving segmentation and personalization as they face down threats from digital competition that result not only from shopping conducted at home but also from contestations taking place within their own walls.

In the physical establishments, the aisle is the locus of much struggle. Before the digital age, retailers, manufacturers, and distributors negotiated the products, descriptions, offers, and prices customers would confront in store aisles. The smartphone has given customers new ways to see the aisle that have stoked store executives' fears as well as their sense of opportunity. One of their concerns is that mobile-equipped visitors can check websites and comparative-shopping applications (apps) for prices the physical store must match if it doesn't want to lose business. Executives also worry about "showrooming": when people enter physical stores to assess products and then, often after checking handset reviews and prices, buy the goods from virtual competitors. Despite these threats, many retailers quoted in the trade literature agree with an app executive who predicted the handset would become "the number-one marketing tool [in the service of physical] retailers and brands."[12] They contend that a properly designed mobile-phone application will help a store tailor offers to desirable customers in the aisle via the handset, thereby creating a high chance of purchase.

Most retailers with a brick-and-mortar legacy have by now built a virtual presence. For them, getting to know the customer well means linking data from an individuals' purchases in the physical store to activities (product views as well as purchases) on the store's app, mobile website, and desktop/laptop website. It may also mean paying third parties such as Axciom or Experian for a customer's income, age, and other information that will help calculate the person's long-term value to the store. These activities are part of a larger galaxy of retail work using myriad technologies of data extraction, analysis, and implementation with the aim, in one consultant's words, to "significantly manage customer relationships in this environment."[13] "Frequent shopper" programs, for example, provide a valuable way to discriminate among customers. In addition, the desire to discern the best prospects may lead a store to pay for a

person's [Klout](#) or similar score that calculates the individual's influence with peers, an indication, providers claim, of the person's value regarding spreading the word about the retailer.

In an age when marketers try to follow prospects wherever they go, shining a light on in-store media also provides a neglected context for understanding challenges media industries face from far outside their typical boundaries. Observers suggest, for example, that the growing use of smartphones is hurting the magazine industry: customers in checkout lines are so busy with their mobile devices that they are not looking at, and therefore not buying, the magazines alongside them.[14] While it can be a source of distraction, the phone can, on the other hand, play a significant role in reaching prospects *prior to* checkout. Procter and Gamble executives have long termed the confrontation between a person and a product in the aisle as "the first moment of truth" for an advertising campaign.[15] The mobile handset and various digital shelf technologies provide unprecedented opportunities for seduction and negotiation in that "moment." Indeed, advertisers might in coming years re-route substantial portions of their traditional-media subsidies to increasingly persuasive in-store media modes instead.

The Need for a Media Industries Perspective

Perhaps media researchers haven't explored these developments in the retail arena because they are unaware of them. A second explanation may be communication studies' historical tendency to focus on industries that centrally aim to create and circulate media content, not industries that generate content as subsidiary to selling other products. It's also tempting to propose the seemingly pedestrian nature of shopping as another reason the media studies scholars have paid this area little attention. Cents-off coupons, noisy audio announcements, mercenary electronic and printed signs, social media for collectivizing decisions about clothing purchases–these may not signal political or cultural importance to academics as straightforwardly as news and entertainment materials do.

Yet decades of academic writings underscore that phenomena—which at first glance appear to be mere cacophonies of textual, visual, audio, audiovisual, and olfactory stimuli—can, with appropriate scholarly lenses, be seen as having patterned social relevance. The challenge for researchers is to move away from their historically comfortable world of clearly defined media industries. The goal should instead be to take a media industries *perspective*. This lens focuses on the industrialized production, distribution, and exhibition of messages in whatever social institutions the process takes place. *Industrial* refers to a conglomeration of for-profit or nonprofit organizations that interact regularly (though not necessarily harmoniously) to create and circulate products, which can include messages. A social institution is a conglomeration of collectivities (advocacy organizations, government entities, industries, individuals) that interact regularly (though not necessarily harmoniously) to direct key areas of collective life. Think of health care, education, the military, the media—and retailing.

The guiding proposition of the media industries perspective is that when message production and circulation is industrialized within an institution, it takes on features that distinguish it from mediated interpersonal activities, such as friends or acquaintances exchanging emails, texting one another, or sharing their shopping lists electronically. That is because the industrial production and distribution of messages inevitably links to large-scale power dynamics that course through the institution. So, for example, when supermarkets, banks, and airlines work with market research firms to define target audiences and create messages to attract them, the

resulting activities have implications both for individuals who are selected as targets and those who are not. Personalized websites, coupons, and advertisements tell shoppers where stores place them in the customer hierarchy. Loyalty programs for the "right" people signal that they can achieve protection from discomfort and bad service. Different prices that stores offer valued versus non-valued prospects signal customers' disparate statuses. So do the different treatments they experience from store representatives who rate customers' value based on information gathered from check-in and check-out technologies.

Sometimes sellers want shoppers to know they are winners or losers so that customers will change their habits to benefit the sellers. People who are treated well algorithmically live in very different symbolic and material worlds than those who are not. Yet retailers embed even valued people in information systems that sometimes work against these valued buyers' best interests.[16] For example, retailers build apps linked to their own discounts and loyalty programs with the aim of discouraging people from accessing information from competitors or neutral sources. Retailers expect that shoppers' desire to accumulate loyalty points will lead them to spend more money than they otherwise would. And retailers hope loyalty-program members will even compromise on products they purchase in order to stay within the fold. The success of such tactics depends on how valued shoppers respond to the selling environment—for example, whether they engage loyalty programs or tire of those regimens and turn to showrooming. Also crucial to retailers' success are the instruments they use to counter wayward actions of shoppers they covet, and how and how long this potentially iterative process continues.

All these activities point to a wide gamut of research possibilities. The data-led treatment of customers raises important questions about when and how retail-based media reinforce, extend, and shape anti-pluralistic, even anti-democratic, processes and perceptions. Some readers may object that studying peripheral media is unnecessary because industries that centrally produce and circulate news, entertainment, and advertising materials also engage in audience constructions, targeted depictions, and the prejudices linked to them.[17] Yet these dynamics may manifest themselves in substantially different ways across different social institutions. Moreover, today's relatively minor media environment may well be tomorrow's dominant one. Retailing, which intersects profoundly with people's daily needs and their most pervasive communication technologies, is moving toward dominance. Interrogating it from a media industries viewpoint will undoubtedly yield absorbing new insights and questions about communication and power in society.

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2 See, for example, Amanda Lotz, *The Television Will Be Revolutionized* (New York: NYU Press, 2007); Mark Deuze, *Media Work* (Cambridge: Polity Press, 2007); David Hesmondhalgh, *The Cultural Industries,* 3rd ed. (Thousand Oaks: Sage Publications, 2012); Robert McChesney and Victor Pickard, *Will the Last Reporter Please Turn Out the Lights? The Collapse of Journalism and What Can Be Done to Fix It* (Washington: New Press, 2011); Pablo Boczkowski and Eugenia Mitchelstein, *The News Gap: When the Information Preferences of the Media and Public Diverge* (New Haven: Yale University Press, 2013); Brooke E. Duffy, *Remake, Remodel: Women's Magazines in the Digital Age* (Champaign: University of Illinois Press, 2013); Joseph Turow, *Breaking Up America: Advertising and the New Media Age* (Chicago: University of Chicago Press, 1997); and Joseph Turow, *Niche Envy: Marketing Discrimination in the Digital Age* (Cambridge: MIT Press, 2006).

3 Helen Nissenbaum, *Privacy in Context: Technology, Policy, and the Integrity of Social Life* (Stanford: Stanford Law Books, 2009); Daniel J. Solove, *Nothing to Hide: The False Tradeoff between Privacy and Security* (New Haven: Yale University Press, 2010); Joseph Turow, *The Daily You: How the New Advertising Industry is Defining Your Identity and Your Worth* (New Haven: Yale University Press, 2012).

4 Mark Andrejevic, *iSpy: Surveillance and Power in the Interactive Era* (College Station: University Press of Kansas, 2007); David Lyon, *Surveillance Studies: An Overview* (London: Polity, 2007); Rebecca MacKinnon, *Consent of the Networked: The Worldwide Struggle for Internet Freedom* (New York: Basic Books, 2012).

5 Daniel Solove, *Understanding Privacy* (Cambridge: Harvard University Press, 2013).

6 Peter Decherney, *Hollywood's Copyright Wars* (New York: Columbia University Press, 2012); Adrian Johns, *Piracy* (Chicago: University of Chicago Press, 2011); Lawrence Lessig, *Free Culture: The Nature and Future of Creativity* (New York: Penguin Books, 2005).

7 Yochai Benkler, *The Wealth of Networks: How Social Production Transforms Markets and Freedom* (New Haven: Yale University Press, 2007); Henry Jenkins, *Convergence Culture: Where Old and New Media Collide* (New York: NYU Press, 2008).

8 Turow, *The Daily You*; Vicki Mayer, *Below the Line: Producers and Production Studies in the New Television Economy* (Durham: Duke University Press, 2011).

9 Henry Jenkins, *Spreadable Media: Creating Value and Meaning in a Networked Culture* (New York: NYU Press, 2013); Sarah Banet-Weiser, *Authentic ™: The Politics of Ambivalence in a Brand Culture* (New York: NYU Press, 2012).

10 Mark Deuze, ed., *Managing Media Work* (Thousand Oaks: Sage Publications, 2010); Mayer, *Below the Line*.

11 Thanks to Bo Mai, a doctoral student at Penn's Annenberg School, for these findings.

12 Patricia Orsini, "Millennials in Aisle 2.0," *eMarketer*, November 2012.

13 Ibid.

14 Martin Gicheru, "Mobile Phones in Supermarkets are Killing Magazine Business," *Techweez,* February 12, 2013.

15 Procter and Gamble, "Annual Report: 2006," accessed September 2, 2013.

16 Thanks to Annenberg doctoral student Lee McGuigan for helping me think through this point.

17 Turow, *The Daily You*.

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