

The Forgotten Shop Floor Ireland

The Rise of the Digital High Street

FUJITSU



shaping tomorrow with you

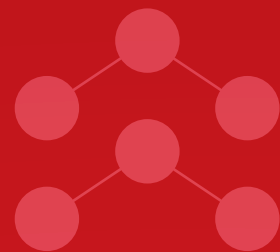


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Foreword



In today's fast-moving retail business climate, the intense pressure on the operation budgets/profit is coupled with an equal pressure to maintain high levels of in-store customer experience and satisfaction.

As digital is fast becoming an integral part of both retail experience and customer interaction, the impact of digital issues on business is more critical than ever. With this in mind, the future of shopping is a merger of e-commerce platforms and in-store customer experience.

Today's Irish shopper has specific requirements and to satisfy these, it is important to build an Omni Channel Model on solid technological foundations. Heretofore, Irish retail habits were borne out of necessity and was traditionally a "need to have" as opposed to a "nice to have" business.

The marriage of this traditional concept with the adoption of innovation can lead to teething difficulties. These difficulties can also lead to the Irish retailer playing catch-up with pioneering competitors who take advantage of the early buy-in of technologies where a return on investment is quicker. Not only does waiting for others to pave the way highlight a lack of innovation and forward thinking it also results in a loss of competitive edge and the loss of sales to Irish retailers.

All too often, time and energy is focused on assessing the product profit margin rather than focusing on how Irish customers want to shop and providing them with the platforms they crave. Fortunately, satisfying our customers can be very profitable indeed.

This report endeavours to offer an insight on employees' and consumers' views on technology available in-store in Ireland today and touch on the possibilities for the future. It provides a valuable perspective on where the gaps, and the opportunities, lie while promoting and motivating the right behaviours from a customer centric perspective.

The High Street/e-Commerce Street holds greater opportunities than ever, but only for those willing to, at least embrace the pace of change and at best, set the pace. Technology is ticking, customers and competitors are poised to move forward. There is no time to be standing still.

Mar a deir an seanfocal, Ní fhanann trá le fear mall

Kenneth Keogh
Retail, Fujitsu Ireland



Executive Summary



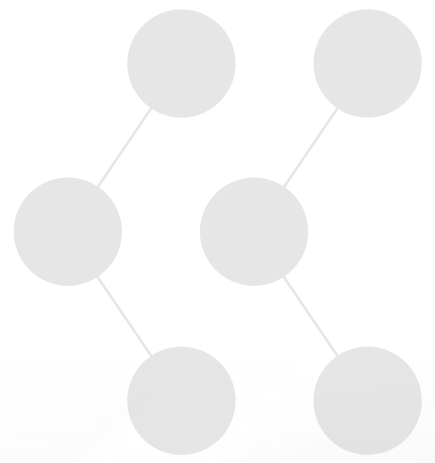
A turbulent future

- Picking up pre-purchased products, trying out items found online or shopping for goods that they will buy online later are all becoming more important for consumers.
- Three quarters of shoppers say they would trust Amazon and eBay to deliver a better in-store technology experience than today's high street retailers.
- Personalised offers, smart mirrors and having goods delivered automatically to their car are amongst the most popular applications of future in-store technology amongst consumers.

Differences of opinion

- Over 90% of colleagues say that in-store technology helps them to serve the customer better.
- But one quarter of consumers say that they have a 'poor in-store technology experience' very often or every time they visit.
- Three quarters of employees agree that consumers can access product information faster using their own devices than through in-store tech.





In service to the customer

- Two thirds of retail employees believe that in-store technology is focused on improving customer service.
- More than half say that the main benefit of in-store tech is that it helps them solve customer issues.
- Nine out of 10 colleagues feel that using this technology makes a good impression on customers.

Instinctively digital

- Two-thirds of retail colleagues use in-store technology to serve customers "multiple times a day".
- A quarter of consumers say that they use in-store technology every time they go into a store.
- Mobile stock monitoring apps and smart checkouts are most commonly used amongst employees, smart checkouts and digital enquiry points amongst consumers.



With the blurring of online and high street experiences, digital strategies have centred on empowering customers, through online stores, click-and-collect and one-click purchases. However, does this mean that the shop floor – and specifically the employee – has been forgotten?



Introduction

The high street is dead. Long live the high street

Few topics of conversation in the retail space draw as stark an emotional response as the subject of Ireland's high streets. Maligned and celebrated in equal measure, opinions about the long-term prospects of Irish retail's cornerstone are just as varied and colourful as the multitude of businesses that line our pavements.

This diversity of thought is entirely understandable. What was once a necessity - literally the only way to purchase many goods - has now become just one of a multitude of options open to shoppers. From online orders that can be fulfilled within the hour to click-and-collect services that mean we barely need to enter a store, the internet has changed the way we shop forever. As a result, high street retail has become less necessity and more 'experience', a conscious undertaking that carries broader connotations than pure commerce.

And so for every headline proclaiming physical retail's slow decline, its "death by a thousand clicks" at the hands of digital, lies an equally compelling argument that the high street is simply in the process of an unprecedented evolution, one in which technology is helping to redefine what bricks and mortar stores can be and what high street retailers themselves mean to the public.

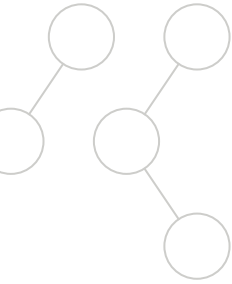
The ultimate impact of that technology is, of course, dependent on the degree to which it is adopted. For retail technology to be more than just a distraction, it needs to be relevant, useful and compelling to its intended audience: the shop floor employees and the customers expected to make use of it.

Whether it is expanding and augmenting the shopping experience or simplifying and streamlining a customer's route to a purchase, when retail technology is done right it can fundamentally redefine what a store can be. Done wrong, it risks becoming little more than an obstacle - one that is likely to infuriate both shoppers and staff alike as they navigate around it.

To discover the extent to which Irish retailers have embraced the transformative power of in-store technology, we sought the views of 500 retail colleagues and 500 consumers from Ireland. Questioning them on a wide range of issues ranging from their experience of in-store tech to their expectations for the future of the high street, we learned much about the factors that thrill and frustrate them when it comes to physical retail.

The results of this study, explored in-depth over the following pages, reveal how retailers across the country need to ready themselves for an ever-increasing list of demands regarding their in-store technology - not just from their customers, but from their own people too.

The Future of the Store



A changing role for bricks and mortar

Today, shoppers highlight two key factors that draw them to a physical store: browsing and buying (50%), and the overall in-store experience (27%). While these elements remain important when consumers consider what needs the store of the future should fulfil, they are flanked by an increasingly important set of considerations that continue to blur the lines between offline and on.

Asked what they felt their main use for high street stores would be in the future, many consumers continued to stress the importance of being able to browse (25%) and enjoy the overall in-store experience (21%). Elsewhere, though, great change is afoot.

While only a small minority (8%) said that their primary use for high street stores today is to collect goods they've already purchased online, significant numbers want to be able to do so in the future (22%). And even when not collecting items they've previously purchased, many expect the best of both worlds - either by testing out products they've already found online (18%) or identifying goods that they will then buy via digital channels (14%).

Consumers might not think about it in such terms, but they are - in essence - expecting the store of tomorrow to become an exemplar of omnichannel retail. In their eyes, at least, the physical store of the future caters flawlessly to myriad demands: it is at once a boutique, a warehouse, a leisure destination and a test centre, one in which they can pick, prod and purchase goods as their needs dictate.

A smarter, more personalised experience

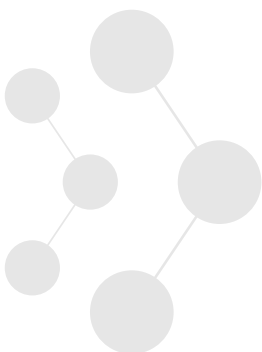
It isn't just the fundamental purpose of the physical store that shoppers expect to evolve as time goes by. They also have strong opinions on how technology could be employed to deliver a more complete and compelling experience.

Top of the list for the majority of consumers is personalisation. Almost half of those surveyed (46%) named personalised offers that could be sent to them while they were in-store as their top choice when considering what technology could be introduced to improve their shopping experience.

Discounts and better prices are only the tip of the iceberg in terms of what consumers believe in-store can achieve, however. A third (36%) are intrigued by the prospect of smart mirrors that can display additional information, while stores being able to place goods in a connected car (24%) and the concept of interactive augmented reality displays are similarly enticing for many (24%). Customer service chatbots, biometric payment methods and even stock shifting drones also see support from some.

The viewpoints on show here only serve to crystallise the thought that consumers are now looking for a seamless blend between offline and on. The physical retail experience will continue to remain relevant for shoppers, but they increasingly believe that it can be improved using the tools and techniques they have experienced online.

The opportunities to deliver on that demand that are plentiful, particularly in the case of personalisation. In many ways, cutting-edge technology now allows retailers to provide a more 'old-fashioned' kind of service, one in which colleagues can give personalised, tailored assistance to customers they have never even met. And far from finding it intrusive or overbearing, many shoppers actively crave that level of intimacy.



Resistance to change

Where do retail colleagues fit in this new world envisioned by shoppers? Although consumers seem to picture an environment in which technology does much of the heavy lifting - both figuratively and literally - currently performed by store employees, the latter group have their own ideas about how their role can complement these incoming systems and services.

Much of this thinking seems to fixate on refining and further digitalising existing tasks. Tools like smart checkouts (48%), mobile point of sale terminals (47%) and mobile stock monitoring devices (45%) top their wishlists when asked which new technology they would like to see introduced, many of which are already in use today according to colleagues.

A heavy focus on these largely transactional processes naturally means that employees give less consideration to the ways in which technology might help them deliver more to customers. Colleagues are less interested in the introduction of tools that would help them access customer loyalty systems (36%) or CRM platforms (34%), for instance, despite an increasing demand for a personalised experience amongst shoppers. Just a third (31%) of colleagues said that new technology helps them upsell.

At the same time, employees are quick to point to many of the productivity gains that result from the introduction of new in-store technology.

More than half of colleagues say that new tech allows them to do their job more effectively (57%), simplifies and speeds up their work processes (53%), saves them time (53%), and that it helps them complete sales to customers more rapidly (50%).

While colleagues might not acknowledge the full range of opportunities that new technology presents in terms of customer service and the positive commercial impact on the store, there can be little doubt that technology reduces the time spent on transactional activities and frees them up to add value elsewhere.

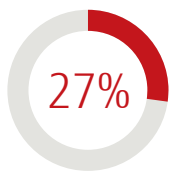
The challenge now is to help employees continue further on that journey, enabling them to add value not only because technology has given them more time in which to assist customers, but because it is being used to create a more personal and meaningful experience for them too.

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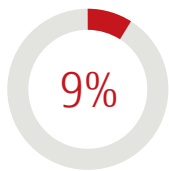
What is your main use for the high street store?



Browsing for and purchasing products



For the in-store shopping experience



Trying products I've found online

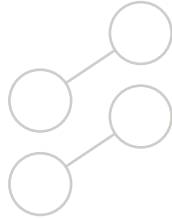


Identifying products I will then buy online



Picking up products I've already purchased online

Rising Expectations



Blurred lines heighten expectation

High street shoppers are unconvinced that they're well served by in-store technology. They stress that it can be slow, unreliable and in short supply and, in many cases, they feel that they are both better equipped and better informed than the shop floor employees serving them.

This is a problem, and one that is being exacerbated by the speed and convenience that shoppers experience online.

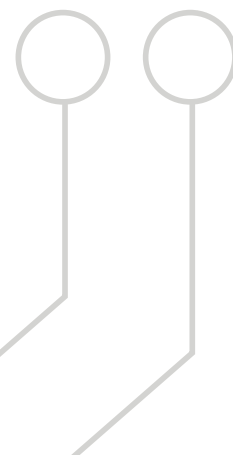
When it comes to physical retail, consumers cite one clear reason that they choose to venture into a bricks and mortar outlet: the physical experience. Half (50%) of those surveyed said that browsing and buying in person was their primary reason for visiting a high street store, followed by a quarter (27%) who go mainly for the "in-store shopping experience".

The immediacy of this experience is important to the majority of consumers. Few, for instance, say that they go to a store to try out products they've already sourced online (9%) or to look at items that they will then purchase over the internet (6%). Shopping on the high street remains an event for many, and one that is actively pursued and savoured.

It is also an event that consumers say can be enhanced by technology. Almost half of consumers (49%) stress that in-store technology's main benefit is that it speeds up the service they receive. A third (34%) cite the ability to access additional product information, while personalised offers and vouchers (25%) are a draw for some.

There is a clear blurring of the lines between physical and digital retail here. While they might want to take their time and enjoy the 'occasion' that in-store retail presents, they're also looking to apply a digital overlay to that experience. Faster service; more information; personalisation: all hallmarks of digital retail, and all benefits that consumers want in-store technology to deliver.

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Trusting the online giants

The demand for a blended in-store experience, one in which the convenience of an online transaction combines with the tangible, emotional draws of a physical branch, stirs interesting thinking about some of the digital world's biggest names amongst consumers.

Some three quarters (73%) of consumers say that they would trust a company like eBay or Amazon to provide a better in-store technology experience than existing high street retailers, for instance. Moreover, 71% suggested that if those companies did launch physical outlets, they would quickly become their preferred stores to shop in.

These are not unfounded assertions. Although factors like price and personal choice undoubtedly drive the majority of retail purchases, consumers do acknowledge that in-store technology can sway their decision about where to buy.

Well over half of shoppers say both that the quality of in-store technology directly affects their loyalty to a particular retailer (59%) and that they have proactively chosen to buy an item from one store over another because they knew they would enjoy a better technology experience (57%). More still (76%) say that a positive technology experience would increase the likelihood of them spending out on additional items.

There is a clear through-line at play here, and it is one that provides cause for concern.

When consumers opt for physical retail over digital, they nonetheless look to in-store technology to boost their enjoyment of that experience - albeit by streamlining that event and seeking to make parts of it more transactional. This is important enough to many shoppers that they will even make conscious choices about where to place their loyalty - and cash - based on the technology experience they expect to receive.

All too often, those expectations are dashed, the experience poor. Poor enough, in fact, that a significant majority say they would trust digital brands largely unproven in the physical retail space to deliver a better overall solution and to rapidly become their destination of choice.

This presents a tough ask for retailers. Consumers expect them at once to maintain the qualities that make in-store retail an attractive proposition - the space to browse and an enjoyable in-store environment - whilst simultaneously enhancing it with technology that can compete with the very best online experiences that have been honed and refined across two decades.

Those demands don't end there. As shoppers look to the future, they have even greater expectations about what in-store technology should offer.



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The Digital High Street

In-store tech today

From enhanced efficiency and improved productivity to cost reductions and the creation of a more compelling customer experience, successful deployment of in-store technology can deliver benefits of all kinds for high street retailers.

"Success", of course, can be difficult to define. Bleeding edge technology for one retailer might be old news for another, and the complex ecosystem of apps, devices, systems and services in play can vary wildly between stores. Creating the 'right' technological environment for a location is arguably more important than pursuing the most advanced one.

While the individual factors that govern success may differ between retail locations, though, benchmarking technology's overall impact on the high street is still possible. Issues like utilisation rates, confidence and capability amongst customers and colleagues all shed light on the degree to which the high street has integrated the digital trends of the past few years.

At even the broadest level, the extent to which technology has penetrated the retail environment is clear to see. Almost 90% of retail colleagues say that they use technology to serve customers two to three times or more on an average day, and many consumers say that they make use of in-store technology every time they shop (24%) or at least once a week (29%).

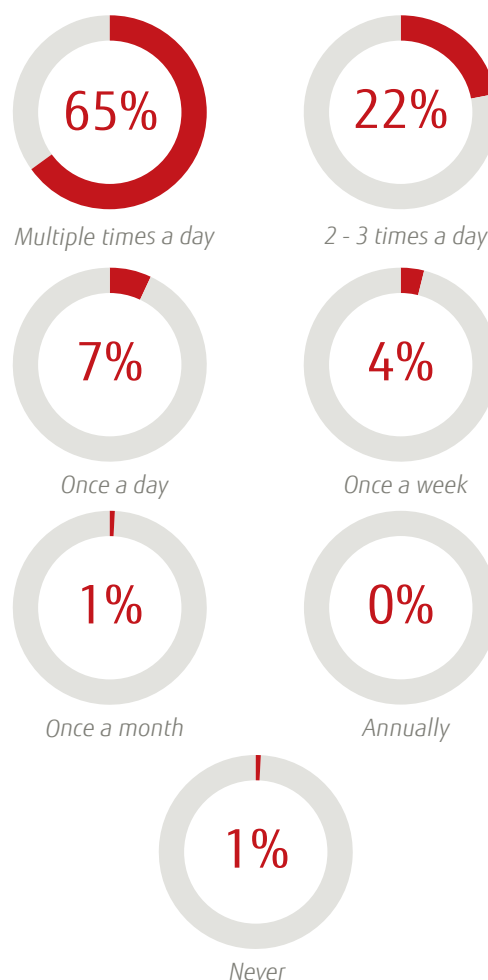
Consumer exposure to retail technology is high: even those with the lowest tendency towards in-store tech still say that make use of it every few months at least. More importantly, however, this exposure tends to be spread across a diverse range of tools and technologies.

Although relatively few (15%) have made use of augmented or virtual reality technologies in-store, significant numbers say they have experience with tools such as mobile points of sale (36%), digital enquiry points (53%), customer loyalty systems (46%) and smart checkouts (61%).

If customer usage of in-store tech is both frequent and varied, the same is equally true for retail colleagues. Two thirds (65%) of those surveyed suggest that they use in-store tech to serve customers multiple times a day, with mobile stock monitoring (53%), smart checkouts (51%), mobile point of sale devices (43%) and customer loyalty systems (46%) amongst the most utilised systems and services.

The form and function may differ from customer to customer, but the message is clear: technology is now an integral part of the everyday high street retail experience.

How often do you use in-store technology to help customers?



For many employees, in-store technology serves one major purpose: improving the customer experience. Two thirds (67%) of retail colleagues say that new in-store tech added in the past 12 months has been focused on improving customer service, with the remainder (33%) holding the belief that it has been brought in to help boost their own performance.

For the most part, retail technology seems to live up to that expectation. Well over half of colleagues state that the introduction of new technology has helped them to save time (53%) and gain access to a broader range of information (57%), but it is technology's ability to help solve customer issues that is seen as the greatest benefit by most (60%).

This consistency between promise and performance draws a warm response from retail employees. Nine out of 10 (90%) believe that the in-store technology they have seen introduced 'fulfils its role', and colleagues are unanimously supportive of the idea that it has also had a positive impact on their own role too (100%). That a similarly high number (90%) say that they value the in-store technology available to them should come as little surprise.

Perhaps indicative of the value that technology has added to their interactions with customers, colleagues also profess a high level of confidence in their ability to use it effectively. Almost all of those surveyed (91%) are assured in their prowess with in-store tech and, even when new systems are introduced, more than three quarters are confident with it either immediately (24%) or within a single week (51%).

91%
of those surveyed are
assured in their prowess
with in-store tech



Invested in technology, divested of choice

Retail colleagues are clearly heavily invested in the range of in-store technology at their disposal. Although they are highly satisfied with its contribution to a better customer experience and their own performance however, they are less enthusiastic about their ability to influence the direction of travel when it comes to technology.

Much of the onus for selecting, promoting and training employees on new technology lies with the store manager according to respondents. More than a quarter (29%) say their store manager is responsible for driving usage of technology in their branch, and a third (33%) also receive training on new tech from that person.

In and of itself, this isn't necessarily an issue. But for many colleagues, this emphasis on the senior end of the scale means that they feel disenfranchised around in-store technology choices. Despite the fact that a significant number (58%) say that they already have some say in the tech implemented in their branch, there are clear indicators that their opinions go unheard. More than three quarters (84%) believe that they and their colleagues should have greater influence over those decisions.

This sentiment becomes all the more clear when considering the huge number of colleagues (92%) who say both that technology has helped their organisation to grow and that they would like their organisation to further invest in this field (87%).

Growing Discontent

Shop flaws

At surface level, all appears well with the current state of retail technology. Customers make good use of the services available to them, and colleagues are confident, enthusiastic and highly engaged by the in-store technology on offer to them. Vitally, though, this optimistic overview tells only part of the tale.

Hints at problems lurking beneath the surface first appear when looking at the experience enjoyed by retail consumers when using in-store technology. As detailed earlier, many shoppers make use of the tools and services on offer every time they visit a retail location. Unfortunately, frequency doesn't necessarily translate into quality.

Around three in 10 (29%) of consumers say that they find the technology on offer in-store to be poor either "very" or "quite often". One in 10 (9%) go further still, saying that they experience such frustrations "every" time they visit. And these are not unfounded accusations. Complaints about the services on offer range from it being too slow (45%), unreliable (32%) and immobile (14%), or even that it simply looks bad (11%).

Perhaps most worrying amongst the issues cited by consumers is the thought that - for one third (31%) - their biggest concern is that staff are poorly trained on the technology they are expected to use. Combined with earlier numbers around staff confidence, this is particularly troubling: colleagues may be highly assured about their skill levels, but their customers remain unconvinced.

If the two parties disagree about the level of competence on display however, they at least stand united on another key issue. Shoppers and staff alike demonstrate dismay at the amount of technology available for staff to use. One quarter (25%) of consumers said that a dearth of systems and devices for employees contributes to a poor in-store experience, while six in 10 colleagues (60%) cite shortages as a problem.

Mind the gap

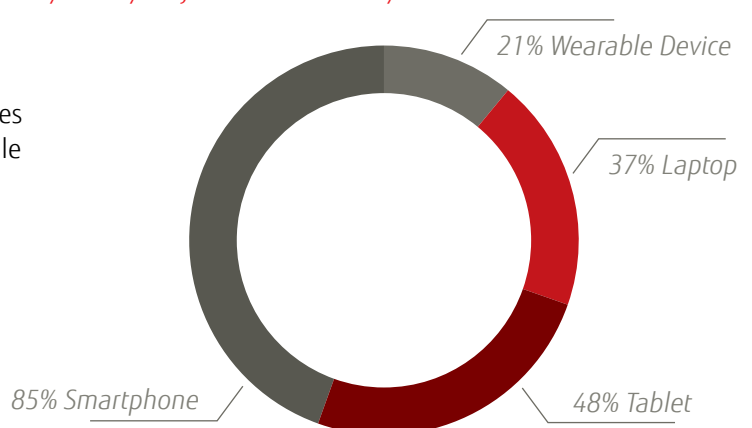
Even when staff do have enough systems and devices to go around, problems persist. Half of those surveyed (50%) note that the technology on offer is slow, while more than a third (36%) suggest that they find it quicker to get on with their job without using the tech they are presented with.

These issues create deeper problems for customers, colleagues and retailers as whole. Employees lend substantial support to the idea that shoppers are able to access a broader (73%) and more rapidly sourced (73%) array of information about products using their own devices than those provided in-store. Almost half (45%) state that shoppers have even commented about the poor quality of the technology on offer.

These attitudes are echoed almost identically by consumers. Three quarters (74%) attest to being able to access more information about products via their personal devices, and that they can get to that material faster than staff can by using in-store tech (75%). The ultimate consequence of this gap between in-store and personal technology is that many colleagues admit to using their own devices in order to circumvent the apparent poor performance of 'official' technology.

Around two-thirds of employees (67%) say that they have used their mobile or other personal device in order to do their job more effectively. A fifth (21%) have even resorted to using their own wearable technology in order to avoid other devices provided by their employer.

Which mobile devices have you used on the shop floor to help you do your job more effectively?



Risks and repercussions

The readiness with which colleagues are prepared to substitute authorised devices with their own presents considerable cause for concern. Although a quarter (24%) of employees worry that the in-store technology on offer looks outdated and could give customers a bad impression, few seem concerned by the reputational or security risks inherent in using their own devices instead.

If - as responses have affirmed - shoppers believe that in-store technology is frequently slow and unreliable, those thoughts will only be galvanized should an employee reach for their own pocket rather than an official device. If colleagues don't trust the systems provided for use, after all, why should their customers?

While appearances are important, of course, issues like these pale in comparison with potential privacy and security threats. From colleagues sharing information on individuals that they may deem to be a risk to a store to customers providing personal information that is captured on an unsecured device, the possible pitfalls resulting from the circumvention of official systems are all too plentiful.

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Consumers and colleagues: why the disconnect on technology performance?

Shoppers aren't shy about venting their frustrations around the perceived quality of in-store technology. And while colleagues have their own issues with the devices and services that they and their customers are expected to use, they tend to display a more upbeat attitude towards this technology than consumers.

What could be fuelling this difference of opinion between the two groups?

One potential explanation is ongoing the transition from legacy systems in retail outlets around the country. When consumers make use of in-store technology, for instance, they have little else to compare it to than the devices that they use in their personal life. Colleagues, on the other hand, will undoubtedly evaluate new technology in relation to the performance of older systems or earlier iterations.

As a result, what might feel slow and unwieldy for shoppers could appear to be a major improvement for employees. It might not reach the high standards set by the very latest apps and devices in use in our personal lives, but new technology that replaces older in-store services is almost certain to feel like a step up for colleagues.

Other possibilities also exist. While in-store employees might feel like they operate in isolation from the digital world, consumers are perhaps less likely to see the 'gap' between the two. If browsing and buying goods online is as quick and easy as a few taps on a mobile phone screen, a slower, more drawn-out experience in-store is only ever likely to seem like a failure in contrast.

Whatever the cause, there is a clear opportunity for retailers to bring the satisfaction levels of consumers closer to those currently experienced by their employees.

Conclusions

There can be little doubt about in-store technology's significance to the future of high street retail. It enjoys near-constant usage by consumers and colleagues alike and, while overall opinions about quality differ between these two groups, the overriding viewpoint is that when it works well, in-store tech fundamentally redefines what the physical retail experience can deliver.

These differences in opinion cannot be underestimated, however. Consumers are quick to highlight the frequency with which in-store technology performs below their expectations, citing issues that range from speed and reliability to availability and training. Even employees, as broadly satisfied with the technology on offer as they seem to be, provide ample food for thought around potential improvements.

As discussed at the beginning of this study, there is no 'one-size-fits-all' answer to some of the challenges surrounding in-store technology; what succeeds for one retailer may be completely wrong for another, and every implementation should be mapped to the customer's needs to deliver the greatest chance of success. At the same time, the themes raised by our respondents have relevance across the retail spectrum.



It is with that in mind that we believe retailers of all kinds would be well served by considering the following issues as in-store technology continues to evolve:

■ **Technology works best when it complements the existing experience**

Consumers make great use of in-store technology, but that shouldn't cloud the primary reason for their visit: physical retail - the very act of shopping - remains an enjoyable, sociable pastime. Technology can heighten the quality of that experience, but it should do so as an extension of what makes it so appealing in the first place. Shoppers are looking for a retail experience that is enhanced by technology, not driven by it.

■ **Be ready for the lines between offline and on to continue to blur**

The boundary lines between physical and digital retail have never been thinner. As time goes by, consumers will increasingly come to treat the physical store simply as an extension of the digital brand, a continuation of their online journey that allows them to interact and engage with products in the flesh before making their buying decisions. For physical retail to survive that shift, it needs to strive for the same levels of convenience and personalisation that those shoppers enjoy online.

■ **The gap between confidence and proficiency must be addressed**

The biggest point of contention between consumers and retail colleagues revolves around the proficiency of the latter in regard to in-store tech. Employees are quick to profess their expertise with new devices, apps and services, but indications from shoppers are that this confidence is grossly misplaced. With a third of consumers suggesting that substandard experiences with in-store technology are as a result of poorly trained staff, retailers need to ensure that employees are trained not only in line with their own expectations, but with the customers' too.

■ **Experience from the shop floor is invaluable**

Colleagues are quick to suggest that they should play more of a role in choosing the systems and services that they use on the shop floor. While involving retail colleagues in the decision-making process around in-store tech is likely to be unpractical (and potentially undesirable) for many organisations, there can be little doubt that colleagues can provide valuable feedback on the realities of using it on the shop floor. Extracting and analysing that feedback - particularly in relation to customer utilisation - is likely to generate insights that would otherwise go unnoticed.

■ **Performance first, innovation second**

Consumers aren't averse to new ideas. Indeed, they have great expectations about what the store of tomorrow could offer - from personalised offers all the way through to robotic staff. At the same time, their primary demand isn't for innovation but for the certainty that the systems in place already will perform to their expectations. Stores that invest in bright new ideas while leaving existing services unfinished or running poorly are likely to draw the ire of their customers.

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Methodology

Data for this study was gathered by Coleman Parkes, an independent research consultancy. 500 consumers and 500 employees from retailers with an annual turnover of £25m+ from across Ireland took part in an online survey between December 2016 and January 2017.

A note on 'in-store technology'

Taken at face value, the words "in-store technology" cast a broad net. They could, after all, refer to simple, long-standing items such as cash registers and telephones. To keep respondents focused on new and upcoming systems and services, we asked them to answer with the following interpretation in mind: 'in-store technologies should be defined as mobile tablets, mobile points of sale (excluding static till points), smart checkouts, digital enquiry point, self-checkouts, mobile stock monitoring applications and devices.'



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