SCALA

FUTURE STORES

PLANNING FOR POST-PANDEMIC SUCCESS:

RECOVERY SOLUTIONS AND STORE STRATEGIES FOR RETAIL BRANDS

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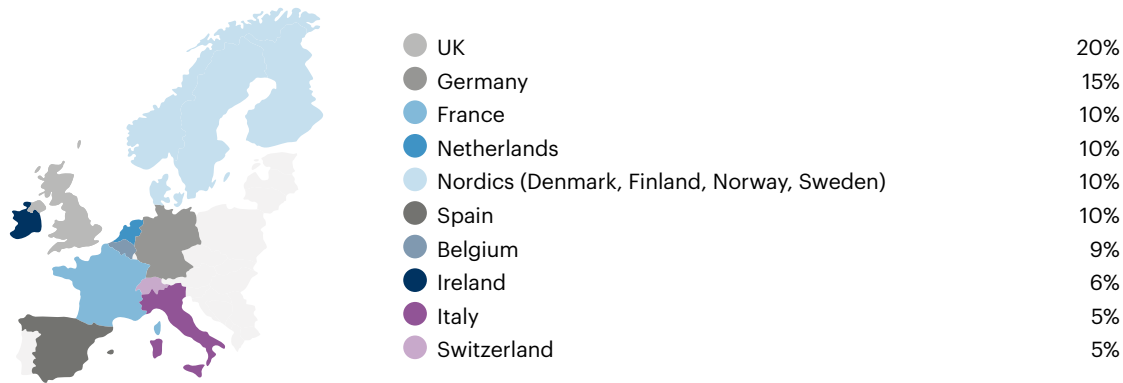Director,
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METHODOLOGY

COVID-19 has changed the way that customers are shopping and how retailers are operating. We examined how technology is being used in the retail industry since the start of the pandemic and how this might adapt as we move forward post-lockdown.
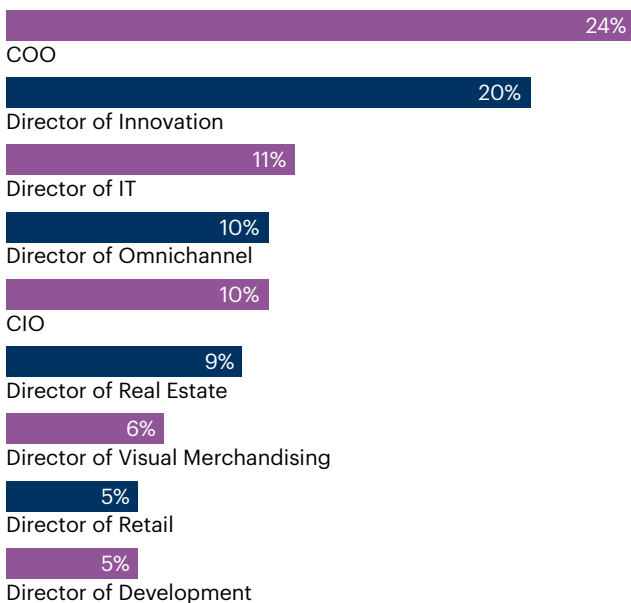
Across Europe, our survey respondents were asked about the challenges their organisations are facing in 2021, due to the impact of the COVID-19 pandemic, and the innovative solutions that they are putting in place.

In Q1 of 2021 WBR Insights and global marketing technology company Scala surveyed 100 senior-level respondents from across the retail industry who were based in Europe. The survey was conducted by appointment over the telephone and the results were compiled and anonymised by WBR Insights and are presented here with analysis and commentary by Scala and the Future Stores community.
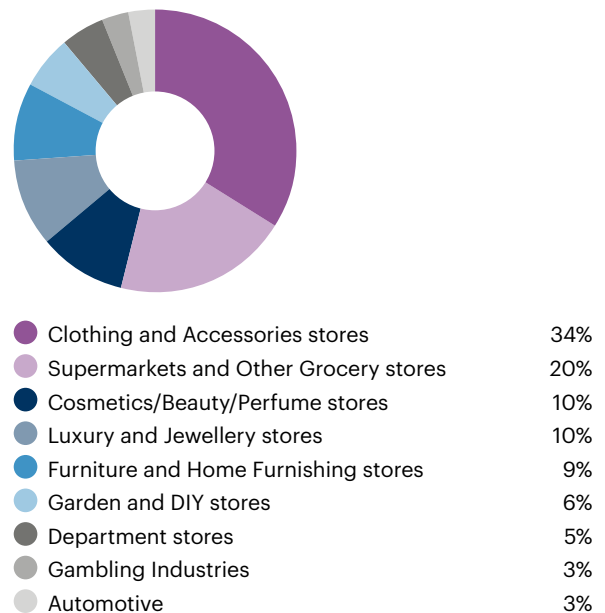
RESPONDENTS' COMPANY HEADQUARTERS

UK	20%
Germany	15%
France	10%
Netherlands	10%
Nordics (Denmark, Finland, Norway, Sweden)	10%
Spain	10%
Belgium	9%
Ireland	6%
Italy	5%
Switzerland	5%

WHAT IS YOUR JOB TITLE?

- COO — 24%
- Director of Innovation — 20%
- Director of IT — 11%
- Director of Omnichannel — 10%
- CIO — 10%
- Director of Real Estate — 9%
- Director of Visual Merchandising — 6%
- Director of Retail — 5%
- Director of Development — 5%

WHAT IS YOUR ORGANISATION'S PRIMARY BUSINESS?

Clothing and Accessories stores	34%
Supermarkets and Other Grocery stores	20%
Cosmetics/Beauty/Perfume stores	10%
Luxury and Jewellery stores	10%
Furniture and Home Furnishing stores	9%
Garden and DIY stores	6%
Department stores	5%
Gambling Industries	3%
Automotive	3%

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Introduction by Scala

Retail has changed. As stores reopen following months of restrictions, there is a huge opportunity for brands to reassess priorities and reconfigure their operations to make the most of the new retail landscape and shopping behaviours. For those retailers that have weathered the unpredictable year, future survival and success will be dependent on being able to make a meaningful connection with customers. Brands will need to clearly communicate what they have to offer, demonstrate an appreciation of what is important to their shoppers and be able to adjust operations based on data insights.

This benchmarking report provides a snapshot as to where brands are now — the priorities of retailers as they look ahead and how they plan to invest to ensure success for the future. Almost all of the decision makers agree that attracting customers to store premises is essential but the methods employed to attract that footfall vary. This report looks at the modifications that brands predict they will make in the next year: the reconfiguration of store layout, the technology utilised in-store and what data will be crucial in formulating future plans.

The data captured in this report shows that there is an appreciation of the ways various lockdowns have changed customer priorities and how individuals prefer to shop. Retailers are interested in leveraging technology to offer customers a "start anywhere, finish anywhere" experience, and they recognise the importance of an omnichannel solution. For instance, a significant number of retailers are reallocating floor space to fulfilling online or in-app orders and some are considering using the car park as a way to broaden sales opportunities.

Looking at the responses, there is a clear need for retailers to provide more effective communication to their customers. Some retailers are looking at digital solutions to better engage potential customers before they even enter the store, investing in street-facing signage to attract passersby and using occupancy management solutions. Automation is another theme present in the data, as is a desire for retailers to use technology to minimise waste and maximise the effectiveness of customer and staff interactions. The desire to maximise the way store space is used to blur the lines between the in-store and online experience is also present. What is most exciting though is the appetite across all retail types for trying out new things and for using data, integrated with technology, to build a better customer experience and create more robust business models. Removing friction from the customer experience, which is possible through technology, is vital for retailers of all types.

There are many strategies and solutions available to retail brands. This report provides an invaluable look at the sector as the high street rebuilds from a transformative year and moves forward.

PART ONE

Retail Post-Lockdown: Investment Planning for the Future

COVID-19 continues to be present in many economies across Europe. But, now in high gear, vaccine initiatives have provided a much needed glimmer of hope to the retail industry. This presents a fresh start for retail brands to review their brick-and-mortar store layout, ready to welcome back their customers.

Many retailers are keen to attract customers back to their brick-and-mortar stores as lockdown restrictions ease across Europe this summer and in the months ahead. Recognising the value of retaining the personal contact with their customers and providing a place for people to connect with each other, in-store will be key to regenerating the high street. 69% of respondents stated it will be important for them to attract customers back to their physical stores rather than focusing on generating online sales. However, determining the success of increasing foot traffic in-store after lockdown will depend on the timing of easing of restrictions and the messaging the retailers communicate to their customers.

It is interesting to see that the majority of our respondents said that online sales could not wholly replace their physical stores. Brick-and-mortar stores offer customers a unique and personal experience compared to browsing online. It allows customers to see and feel products, compare items and sizing and purchase their items without waiting on delivery. Furthermore, many consumers simply enjoy shopping and will be happy to experience visiting retail stores again. For retailers, it provides the opportunity to deepen their customer relationships, showcase their products and secure additional sales.

According to our respondents, a lot of their customer behaviour analysis takes place in-store and this cannot be done online — this includes customer service counters, in-person surveys, BLE (Bluetooth Low Energy) beacon networks, and in-store sensor systems offered by marketing technology companies such as Scala. They were also of the view that post-lockdown,

customer behaviour and levels of interaction will inevitably change as a result of practising and following government-mandated social distancing and other pandemic guidelines. However these customers will be undeterred by the pandemic and look forward to visiting stores upon the easing of lockdown restrictions.

As in-store remains a priority for retailers, there is an appreciation that new shopping behaviours will require an investment in improving low-contact purchasing options. There are several ways that retailers can reinforce a positive and convenient shopping experience through technology. These include self-service point of sale kiosks, self-service point of sale scanners, geo-gating/mobile point of sale functionality, street-facing display technology and online fulfilment capabilities.

71% of our respondents said that pandemic measures and capacity restrictions had encouraged their organisations to invest in fulfilment options. This was followed by 58% of respondents that said they were considering investing in different click and collect options at other premises such as newsagents or petrol stations.

40% of respondents also said the one area they felt showed the greatest promise in increasing sales and customer satisfaction was optimising the ways in which customers can purchase, receive and return items.

Post-pandemic, there are plenty of opportunities for retailers to start planning their investment strategy for the next 12 - 18 months. Our survey research suggests that retailers' key priorities will be increasing in-store sales, boosting customer satisfaction and continuing to invest in diverse fulfilment options. Those retailers that can quickly adapt their omnichannel approach using the above methods are more likely to recover faster as we come out of lockdown.

91% of respondents said it was important or very important to attract customers to their premises rather than cultivating new online sales

Post-lockdown, how important will it be for you to attract customers to your premises rather than cultivating online sales?

Not important	Neither important nor unimportant	Important	Very important
5%	4%	22%	69%
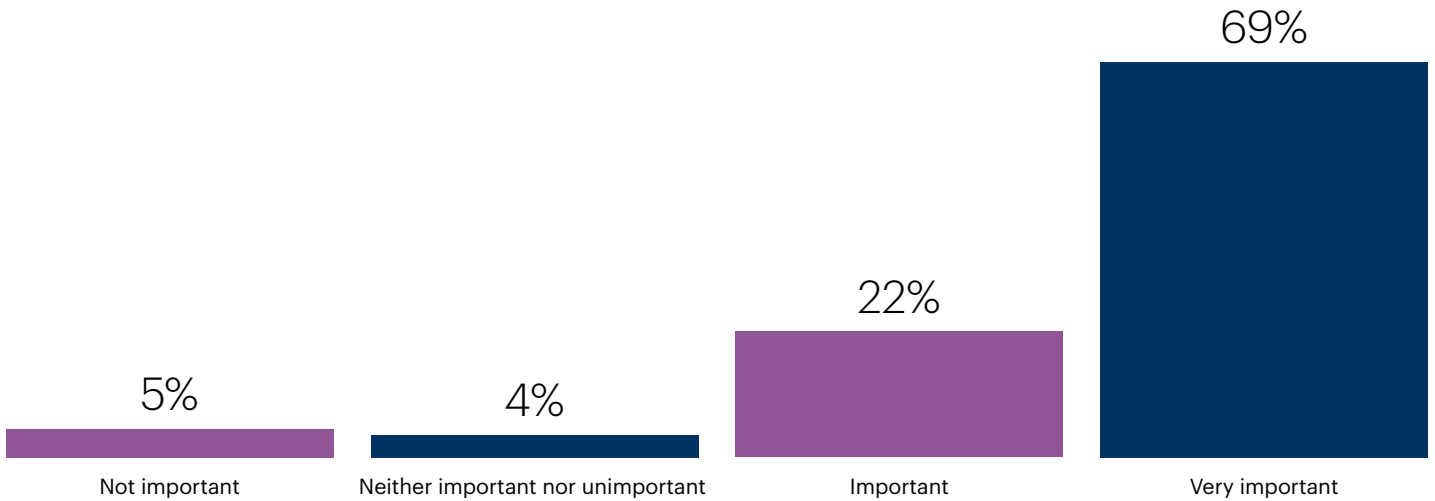
We asked our respondents to explain their answer further. **Here is what they told us.**

"Customers believe more in a physical retail experience that takes place in stores and we want to continue to provide these experiences moving forward."

"Visiting stores is different for our customers compared to shopping online and we want to continue providing that option for our customers."

"There is a lot of behavioural analysis that needs to be done in stores post-lockdown as we need to improve on customer accommodation."

"We have invested a lot in our in-store customer experience, so we need customers to visit our stores to ensure ROI."

"Human interactions are important for us as a service. Also our expertise is utilised and developed in the right way."

"We need customers coming into our stores as we have invested in this but we have also focused on other channels that support sales and safety in these uncertain times."

"It's all about the in-store experience for us at the moment because that helps us to sell in these conditions."

"I am not surprised with the majority result. In recent years retailers have heavily invested in in-store experiences and their layout to create an enjoyable environment for their customers to shop, browse and engage with their brand, so it would be a shame to focus on driving online sales solely. Furthermore, retailers have invested significantly in new technology to improve the in-store experience, and it's imperative to see ROI as life starts to return to normal and customers return to the stores.

As we unlock and come out of COVID-19 restrictions there will definitely be a need for retailers to provide a safe and enjoyable in-store experience to encourage people back and to restore the health of our high streets and communities. I'm sure that customers will look forward to a different shopping experience and it's a good excuse for them to socialise whilst adhering to government COVID-19 safety guidelines. An opportunity that retailers are surely keen to capitalise on."
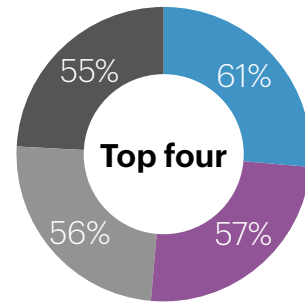
Lauran Allen,
Conference Director,
Future Stores 2021

"It is always important to attract customers to the physical locations, although customers walking into stores in the future might be for a completely different reason. We are seeing more retail outlets becoming experiential centres that offer far beyond a place to purchase goods. 'Experiential' retail has become the common buzzword in the industry. Many retailers are just adapting to provide the experience customers expect from their brand, thus promoting the interactiveness with customers, especially the next-generation shoppers that are craving for an omnichannel experience."
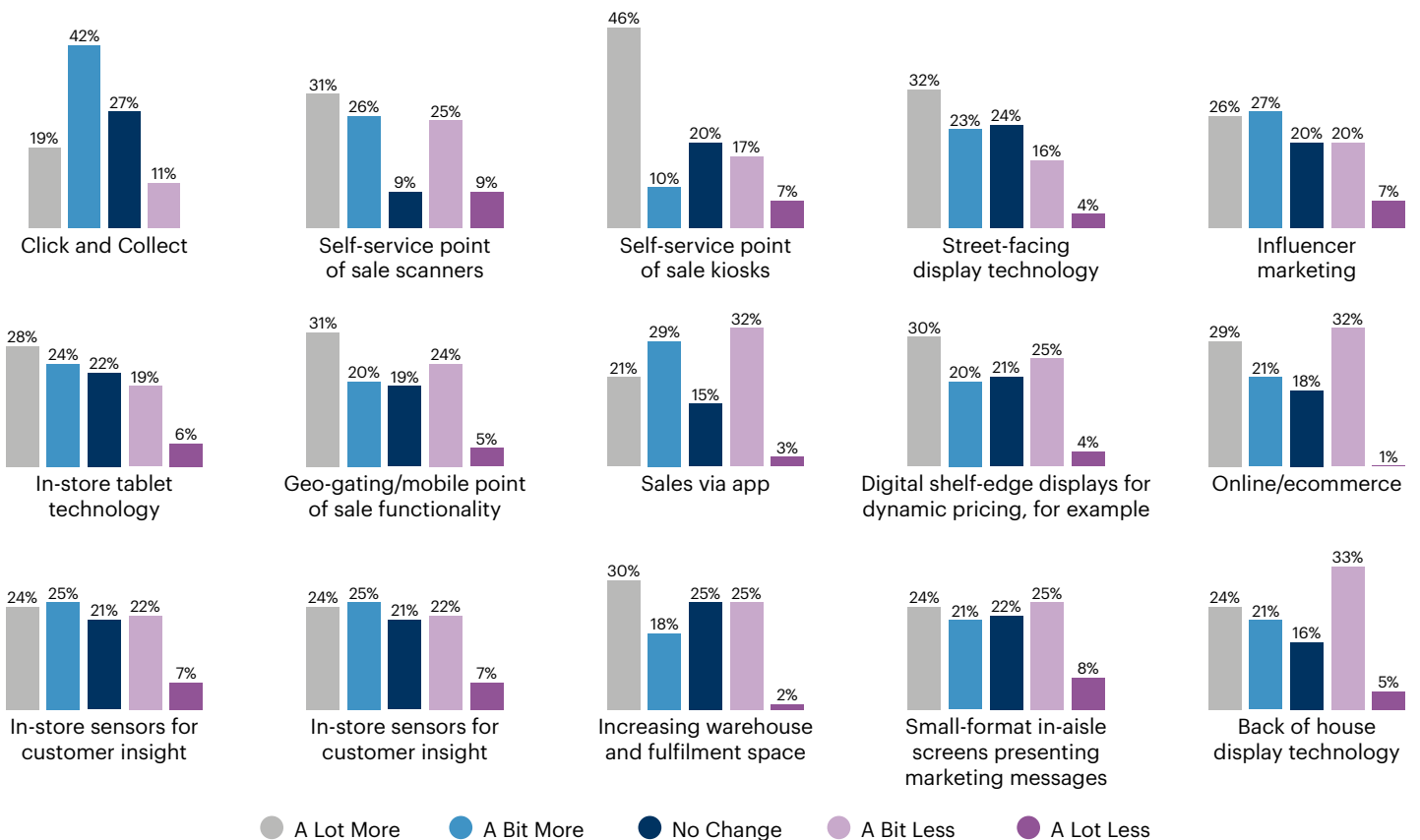
Pavan Pidugu,
Chief Technology Officer, FMCSA,
U.S. Department of Transportation,
former Director of Digital Customer &
Omnichannel Experience, Walmart International

The top four areas which will see a significant increase in budget allocation in the next 12 months are click and collect; self-service point of sale scanners; self-service point of sale kiosks, street-facing display technology

Where do you see the allocation of budget across your organisation changing in the next 12 months?

Top four (donut chart):
- 61% Click and Collect
- 57% Self-service point of sale scanners
- 56% Self-service point of sale kiosks
- 55% Street-facing display technology

Legend:
- Click and Collect
- Self-service point of sale scanners
- Self-service point of sale kiosks
- Street-facing display technology

Click and Collect
- 19% A Lot More
- 42% A Bit More
- 27% No Change
- 11% A Bit Less

Self-service point of sale scanners
- 31% A Lot More
- 26% A Bit More
- 9% No Change
- 25% A Bit Less
- 9% A Lot Less

Self-service point of sale kiosks
- 46% A Lot More
- 10% A Bit More
- 20% No Change
- 17% A Bit Less
- 7% A Lot Less

Street-facing display technology
- 32% A Lot More
- 23% A Bit More
- 24% No Change
- 16% A Bit Less
- 4% A Lot Less

Influencer marketing
- 26% A Lot More
- 27% A Bit More
- 20% No Change
- 20% A Bit Less
- 7% A Lot Less

In-store tablet technology
- 28% A Lot More
- 24% A Bit More
- 22% No Change
- 19% A Bit Less
- 6% A Lot Less

Geo-gating/mobile point of sale functionality
- 31% A Lot More
- 20% A Bit More
- 19% No Change
- 24% A Bit Less
- 5% A Lot Less

Sales via app
- 21% A Lot More
- 29% A Bit More
- 15% No Change
- 32% A Bit Less
- 3% A Lot Less

Digital shelf-edge displays for dynamic pricing, for example
- 30% A Lot More
- 20% A Bit More
- 21% No Change
- 25% A Bit Less
- 4% A Lot Less

Online/ecommerce
- 29% A Lot More
- 21% A Bit More
- 18% No Change
- 32% A Bit Less
- 1% A Lot Less

In-store sensors for customer insight
- 24% A Lot More
- 25% A Bit More
- 21% No Change
- 22% A Bit Less
- 7% A Lot Less

In-store sensors for customer insight
- 24% A Lot More
- 25% A Bit More
- 21% No Change
- 22% A Bit Less
- 7% A Lot Less

Increasing warehouse and fulfilment space
- 30% A Lot More
- 18% A Bit More
- 25% No Change
- 25% A Bit Less
- 2% A Lot Less

Small-format in-aisle screens presenting marketing messages
- 24% A Lot More
- 21% A Bit More
- 22% No Change
- 25% A Bit Less
- 8% A Lot Less

Back of house display technology
- 24% A Lot More
- 21% A Bit More
- 16% No Change
- 33% A Bit Less
- 5% A Lot Less

Legend: A Lot More · A Bit More · No Change · A Bit Less · A Lot Less

Graphs have been ranked by the combined total of 'a lot more' and 'a bit more' to show total investment.
Some respondents have skipped this question during the survey.

"I can understand the motivation our respondents' organisations have for allocating budget towards these four areas. It will help them not only to drive footfall but to provide a safer shopping environment for their customers and to limit transmission of the virus in-store, keeping their store associates safe at work as well. Furthermore, customers are looking for safe shopping experiences and I'm not surprised to see retailers investing in such technology to create a welcoming and safe environment.

It will be interesting to see how this trend develops in 2022 and what the budget allocation priorities will be for retailers after we have moved into the recovery phase from COVID-19."

Lauran Allen,
Conference Director,
Future Stores 2021

"Self-service opportunities are a clear trend as is an investment in signage, whether it be to attract customers into the store or to inform customers at the crucial decision point with shelf-edge digital displays. We've been exploring the ways in which street-facing signage can do more than just communicate promotions. Integrated with an occupancy management system these signs could share the numbers in-store, store safety measures or even act as a sales portal in their own right. Using a "window shopping" solution retailers can stay flexible in times of restrictions and increase the opportunities for sales."

Harry Horn,
**VP Marketing Global**
& GM EMEA,
Scala

"We are just (hopefully) coming out of the pandemic, and a lot of shoppers are still looking for safer shopping experiences. Going through a checkout station and waiting in the lines adds additional safety concerns for the shoppers. Retailers should create an environment where the customers feel safe, whether in-store shopping or click and collect pickup, or home delivery.

Though I am not surprised to see that the top four areas of investment are in the self-service categories. I believe there is much potential for a combination of Smart-Cart technologies integrated with personal mobile devices to become the future of point-of-sale solutions. I would encourage the retailers to think beyond traditional checkout solutions."

Pavan Pidugu,
Chief Technology Officer, FMCSA,
U.S. Department of Transportation,
former Director of Digital Customer
& Omnichannel Experience,
Walmart International

71% of respondents said that recent/current lockdowns and capacity restrictions have encouraged their organisations to invest in fulfilment options

Have recent/current lockdowns and capacity restrictions encouraged you to invest in fulfilment options such as quicker delivery?

29%

29%

42%
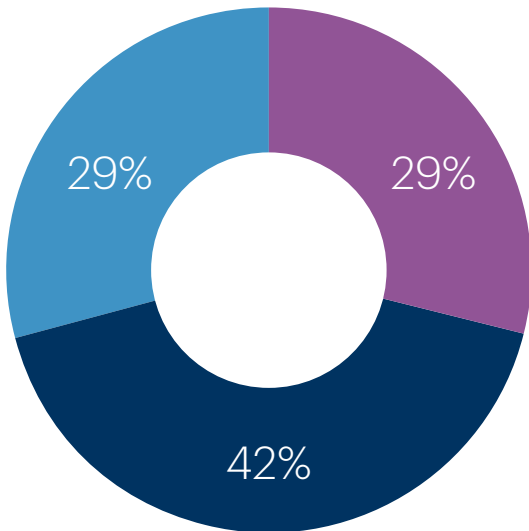
- ● We have invested and will continue to
- ● Yes, we haven't yet but will
- ● No, we haven't yet had the need

Some respondents have skipped this question during the survey.

"Looking at this data, there is an opportunity that has been missed here to use the capacity restrictions and lockdowns to their advantage by innovating new fulfilment options that could help retailers bounce back in the aftermath of the COVID-19 pandemic, and in turn, strengthening their brand and reputation in their response to the crisis.

It is also important that retailers recognise the need to implement new delivery methods to customers, such as reviewing their delivery options and providers, re-evaluating store policies on returns and exchanges etc. Customers are keen to have an experience with retail brands that works around their current arrangements. Should they be self-isolating, shielding, they might not be able to go to to get back to a store to return their items."

**Lauran Allen,
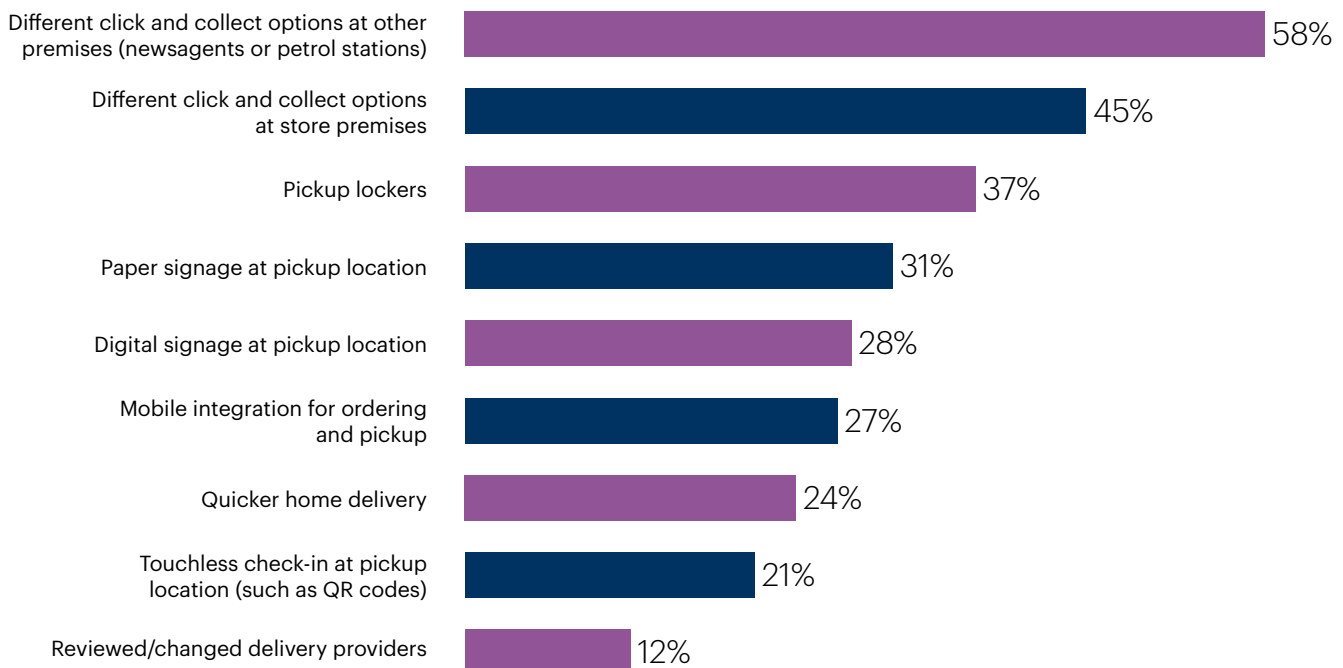Conference Director,
Future Stores 2021**

"At first glance, I was surprised to see that more than 70% of respondents have not invested in quicker delivery options. Upon further analysing the respondents' nature of primary business, it appears 60% serve in the areas of non-essentials like luxury and jewellery, accessories, furniture, garden, and automotive. With that being the case, I was no longer surprised, as the customers and retailers may not require quicker deliveries in specific segments. However, I hope that the 40%+ investing in the alternate fulfilment strategies fall under the essentials or semi-essential like clothing. Customers rely on alternate fulfilment options and are choosing retailers based on the convenient choice they are being provided."

**Pavan Pidugu,
Chief Technology Officer, FMCSA,
U.S. Department of Transportation,
former Director of Digital Customer &
Omnichannel Experience, Walmart International**

Of the 71% of respondents that said their organisations are looking at investing in new fulfilment options, 58% said they were looking at investing in different click and collect options at other premises (newsagents or petrol stations)

If answered 'yes' to the previous question, which fulfilment options in particular has your organisation invested in the last 12 months? Select all that apply

Option	%
Different click and collect options at other premises (newsagents or petrol stations)	58%
Different click and collect options at store premises	45%
Pickup lockers	37%
Paper signage at pickup location	31%
Digital signage at pickup location	28%
Mobile integration for ordering and pickup	27%
Quicker home delivery	24%
Touchless check-in at pickup location (such as QR codes)	21%
Reviewed/changed delivery providers	12%

"I am not surprised that those respondents who said they have been reviewing fulfilment options, since the impact of capacity restrictions and lockdowns, have chosen specifically to invest in different click and collect options at other premises such as news agents etc., store premises and pickup lockers.

Not only are these fulfilment options flexible and easy for customers to use but they can reduce the risk of transmission inside stores and they can enable retailers to keep trading during lockdowns. I also believe that this trend will continue post-lockdown as customers' demand availability of fulfilment options and flexibility whilst there is still a lot of uncertainty."

Lauran Allen,
**Conference Director,**
Future Stores 2021

"The top three fulfilment options are vital as they address both safety and convenience factors that customers must have during the pandemic. Click and collect was a rising concept, especially in the busy families that lived in metro and urban areas, for convenience reasons. During the pandemic, we have seen a significant spike in the number of customers opting for alternate fulfilment choices such as click and collect and home delivery, due to limitations and restrictions imposed such as store timings, number of people that can gather, and many others. I firmly believe this trend will continue in the post-pandemic era. Also, retailers, especially grocers and department stores that have invested and solved alternate fulfilment options, will clearly be the winners."

Pavan Pidugu,
Chief Technology Officer, FMCSA,
U.S. Department of Transportation,
former Director of Digital Customer &
Omnichannel Experience, Walmart International

40% of respondents said optimising ways to purchase, receive and return items was the area in which their organisations felt they have the greatest opportunity to increase sales and customer satisfaction

Post-lockdown - Where do you feel the greatest opportunity is to increase sales and customer satisfaction?
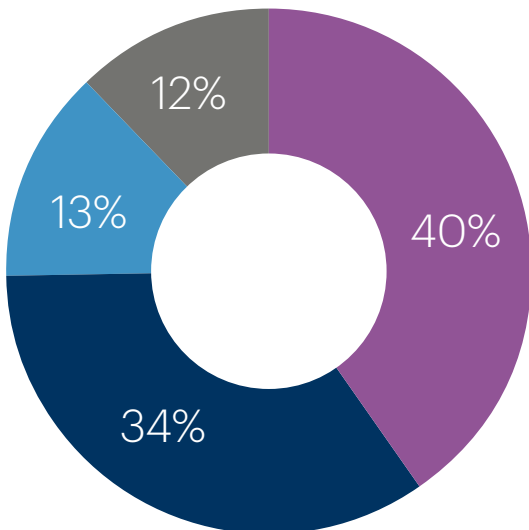
- Optimising ways to purchase, receive and return items
- Investing in our ecommerce offering
- Deepening customer relationships
- Loyalty/membership/rewards programmes

*Some respondents have skipped
this question during the survey.*

"As I mentioned before, it is increasingly important for retailers to understand that their customers need increased flexibility during the impact of COVID-19. This is important because it will allow retailers to build trust and increase customer satisfaction. By developing new ways to make purchases and receive and return items quickly, safely and easily, it will make a world of difference to their customers. I do believe this trend will continue post-lockdown."

**Lauran Allen,
Conference Director,
Future Stores 2021**

"It is no secret that the onset of COVID-19 has changed how we live our lives every day. I feel it is more critical for retailers to listen to their customers, understand what they expect, and re-evaluate retailers' offerings to meet such expectations of the customers. I couldn't disagree that customers are looking for an omnichannel experience. It is good to see retailers feel they have to optimise offerings to provide various ways to enable a seamless omnichannel experience, whether it is to purchase, receive or return to complete a transaction.

Along with the responses listed here, I feel the retailers should invest in other capabilities to provide a safe shopping environment to customers. The capability to show real-time inventory by location will become a need that every customer would appreciate."

**Pavan Pidugu,
Chief Technology Officer, FMCSA,
U.S. Department of Transportation,
former Director of Digital Customer &
Omnichannel Experience, Walmart International**

As countries across Europe start to emerge from COVID-19 lockdown restrictions, retailers have seen a surge in interest from their customers to return to a physical store. In response to this, retail brands will need to re-evaluate what their investment planning goals will be for the next 12 - 18 months. When customers visit a physical store, it can be a lot easier for a retailer to convert a shopper into a buyer, compared to visiting their online stores. The good news is that shoppers started to return to the high street in droves after lockdown last summer and this effect is anticipated by other retailers for the months ahead in 2021.

In-store shopping is an area of business which will be prioritised by almost all of the surveyed respondents and with good reason – the opportunity to convert visits to sales is too great for brands to ignore. The challenge for retailers is to reassure customers of their safety in-store and provide an experience that is as convenient as possible. As shown by the research results, convenience and fulfilment are key areas of focus by brands and where many businesses feel is their greatest opportunity to build customer loyalty. These areas also demonstrate an awareness by businesses that their success will depend on how their brand communicates across multiple touchpoints, including spaces that are not owned by them such as other businesses being used for fulfilment or returns.

Through strategic utilisation of technology, brands will be able to communicate clearly with customers and create in-store efficiencies to benefit not only the shopper experience but also strengthen business operations.

PART TWO

Retail Post-Lockdown: Reimagining Real Estate Options

Post-lockdown, it will not be business as usual for the retail sector as social distancing rules could be with us for the long haul. Therefore, retailers must consider how to utilise their real estate holdings to ensure they use their space optimally while adhering to social distancing rules and other health and safety measures.

As many competitors have had to make the hard decision to close some of their stores, there is a higher percentage of vacant shops on the high street. Many landlords are already reconsidering repurposing their vacant retail stores and thinking of innovative ways to regenerate the ghostly town centres to drive customers back by fostering an enjoyable experience.

This outcome can be an opportunity for some retail brands to review their real estate portfolios and strike new deals with their landlords. UK retailer John Lewis Partnership is undergoing an internal review of their real estate, talking to various third parties to explore converting their excess retail space into mixed-use and affordable residential property.

For those retailers looking to take advantage of the high street and other real estate locations, the car park represents low-hanging fruit with regard to increasing the space for sales, collections, fulfilment or returns. Despite this, only 30% of our respondents indicated they were considering using the car park in

this manner – retailers already considering this may be ahead of the curve. 60% of those respondents that said they are considering using the car park space, said they saw it as important for their organisation as a potential space for sales, collections, fulfilment or returns.

Retailers must re-imagine their baseline requirements regarding post-lockdown shoppers and focus on improving their in-store customer experience once it is feasible to do so as lockdown restrictions are lifted.

As a start, retailers must quickly adopt new safety protocols to comply with health and safety regulations and meet basic customer expectations. Part of this will include changing their stores' layout to gain more control of safety. 55% of our respondents said their organisation is planning to change their store layout post-lockdown. Most of our respondents are considering introducing occupancy management systems to better inform staff and customers about human traffic in the store.

Other areas of importance based on our survey data include introducing digital signage, creating more space for the fulfilment of online or in-app orders, optimising the number of locations, increasing the space for stock storage, reducing display space, and increasing self-service points-of-sale.

The majority of our respondents have not yet considered using their car park or a nearby car park as a potential space for sales, collections, fulfilment or returns

Have you considered using your car park or a nearby car park as a potential space for sales, collections/fulfilment or returns?

70%

30%

No

Yes
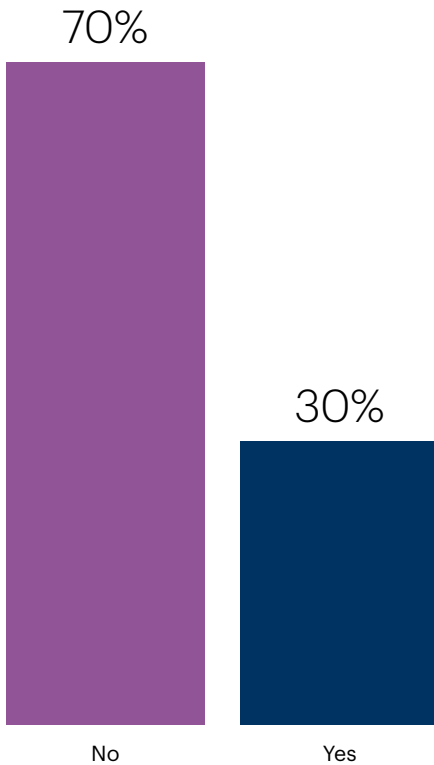
"It is interesting that the majority of respondents have not considered the potential use of car parks. Perhaps this is just not a practical solution for some depending on the location of their high-street stores which might not have a physical car park nearby, or it might be too much of a logistical challenge for their store associates to offer this type of service. For those that have the available space, utilisation of an owned or even shared car park could unlock huge potential as a fulfilment or return location, essentially expanding the shop floor and creating more transactional opportunities."

Lauran Allen,
Conference Director,
Future Stores 2021

"I am surprised to see that most retailers have not considered leveraging car parks as a potential for fulfilment or collections and returns. It is very contrary to what I have observed in both western and eastern parts of the world. Many major retailers in the US have been increasing the number of spots in their parking lot (car park) dedicated to fulfilment and returns. We have also seen designated pickup spots outside of the retailer's car park for customers to pick up at a set time, so the retailer can deliver to multiple customers in the area simultaneously. Some major retailers even experimented with providing new entertainment experiences leveraging their car parks and generating new revenue streams.

I think this trend will change as retailers will see more need for space to fulfil cross-channel orders and meet the customer's new expectations."

Pavan Pidugu,
Chief Technology Officer, FMCSA, U.S. Department of Transportation, former Director of Digital Customer & Omnichannel Experience, Walmart International

Those respondents that are considering using their car parks said this space was important for their organisation as a potential space for sales, collections, fulfilment or returns

If you answered 'yes' to the previous question, how important is the car park as a part of your business as a potential space for sales, collections/fulfilment or returns?

61%

23%

16%

Neither important nor unimportant

Very important
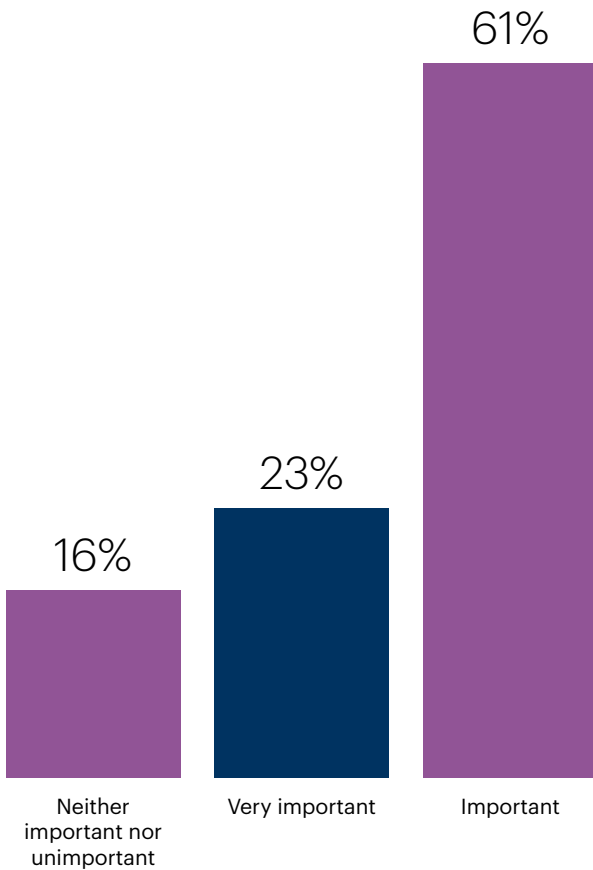
Important

"It is interesting that the majority said these spaces were important or very important to them. This will all be dependent upon the size of the car park spaces these respondent's organisation have available to them and how they decide to best optimise them, whether they will install self-service options or have a socially-distanced store associate present available to assist their customers."

Lauran Allen,
Conference Director,
Future Stores 2021

"In Europe we know car parks do not tend to be as large or common as in the US but for those retailers that have one, the car park could be a key location for brands looking to attract customers, increase sales and up their click and collect capability. Integrating signage, sensors and AI can transform the car park into another sales space and it shouldn't be overlooked as brands consider ways to enhance their offering."

Chris Riegel,
CEO,
STRATACACHE and Scala

"It is fantastic to see that more than 80% of respondents feel that car park is an essential real estate and has potential for reaching their customers better. Retailers have to optimise their limited space to serve customers while providing a safe shopping/pickup experience. If the retailer has a car park, I strongly encourage them to start thinking (if not already) about leveraging the space to offer fulfilment or pick up offerings before losing too many customers to the competition."

Pavan Pidugu,
Chief Technology Officer, FMCSA,
U.S. Department of Transportation,
former Director of Digital Customer &
Omnichannel Experience, Walmart International

55% of respondents said their organisation is looking to change the layout of their stores post-lockdown

Post-lockdown is your organisation looking to change the layout of its stores?

55%

45%

Yes   No

"Looking at this data and the data set below, it makes sense to me that the majority of the respondents surveyed said their organisations will be looking to change the layout of their stores. Retailers need to ensure the safety of their customers and store associates in a post-lockdown environment as well as making it easy for customers to find products on the shop floor, so reviewing the layout and signage appropriately will be important to encourage people back into stores. It's important for retailers to design a safe shopping environment for their customers whilst also considering the most efficient layout that maximises footfall."

**Lauran Allen,
Conference Director,
Future Stores 2021**

"It is critical for retailers to adjust the layout, as it is no secret that physical retail has changed and will continue to change post-pandemic. The need for layout adjustment has been confirmed in so many studies in recent times, and retailers have the responsibility to provide a space that will keep shoppers and employees safe. Apart from the safety aspect, the new layouts can bring the experiential retailing that I talked about earlier. It is an opportunity to provide a new image for the brand with a re-design of the store layout.
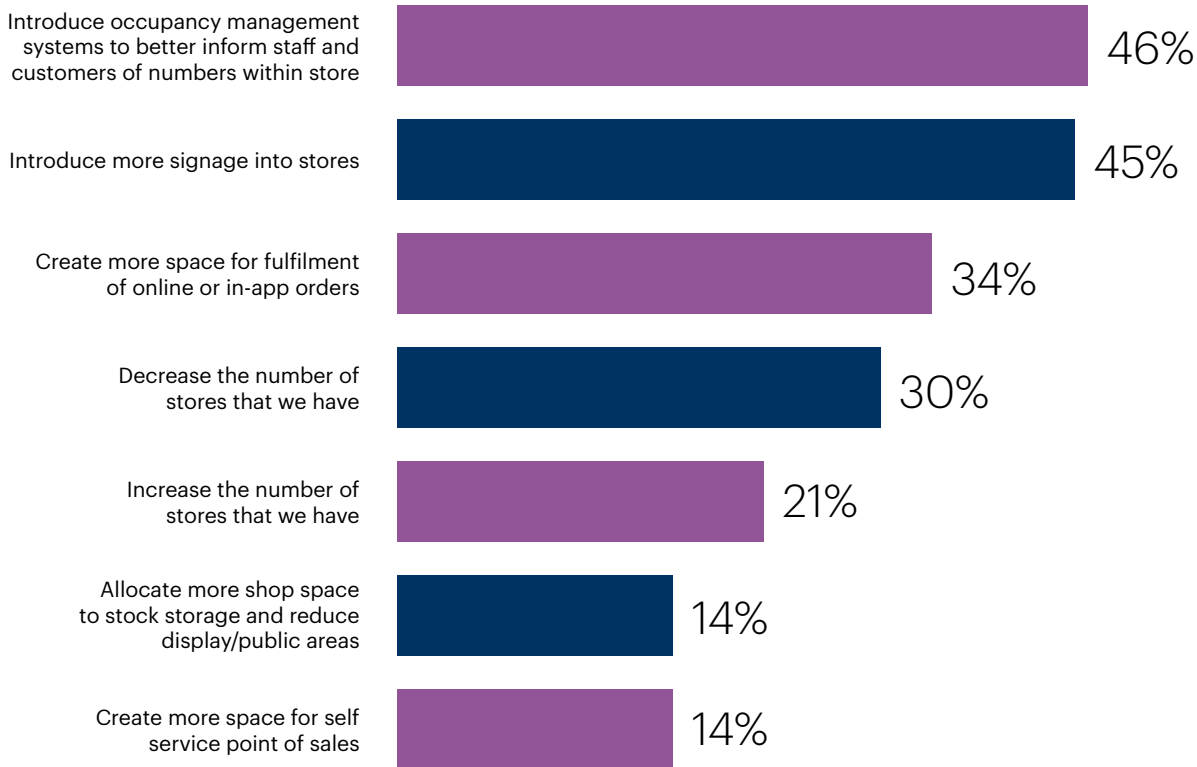
Granted, the store will lose some critical space, especially with wider aisles and reduced space to allow safe distancing with a limited number of customers in the stores. This allows retailers to think outside of traditional technology offerings to get some of the lost space back for shelving products."

**Pavan Pidugu,
Chief Technology Officer, FMCSA,
U.S. Department of Transportation,
former Director of Digital Customer &
Omnichannel Experience, Walmart International**

Of those respondents that said their organisations are looking to change store layouts post-lockdown, 46% said they are looking to introduce occupancy management systems to better inform staff and customers of numbers within the store

If you answered 'yes' to the previous question, what ways in particular will your organisation be looking to change the layout of your stores? Please select all that apply.

Introduce occupancy management systems to better inform staff and customers of numbers within store	46%
Introduce more signage into stores	45%
Create more space for fulfilment of online or in-app orders	34%
Decrease the number of stores that we have	30%
Increase the number of stores that we have	21%
Allocate more shop space to stock storage and reduce display/public areas	14%
Create more space for self service point of sales	14%

"I am not surprised by this data, it can often be challenging for store associates to accurately keep track of the total number of customers inside a store throughout the day whilst they are working. Investing in occupancy management systems will ensure that retailers are better able to monitor the safety of their shop floor environment in the months ahead."

**Lauran Allen,
Conference Director,
Future Stores 2021**

"It is not surprising to see this data at all. First and foremost, the customers are looking for safe environments and are choosing retailers that provide such an environment. Signage in the stores is evident and appealing to customers to be able to assess.

Implementing an occupancy management system is a good measure as a safety precaution. Still, retailers need to communicate how they are using it and the new ground rules that both employees and customers must follow. Otherwise, retailers will not be able to benefit from such implementations."

**Pavan Pidugu,
Chief Technology Officer, FMCSA,
U.S. Department of Transportation,
former Director of Digital Customer &
Omnichannel Experience, Walmart International**

We asked our respondents who said that their organisations are looking to change the layout of their stores, why they are doing so, and what insights they are using to inform this decision. Here is what they told us.

"The current pandemic makes it important to promote safety to the best level that we can."

"We do face higher footfall during certain days and during the first week when lockdown opens. We need systems that will help us control the situation within our stores. Footfall analysis are crucial systems here."

"We believe that running stores would be a slightly expensive move for a while now and reducing the number of our branches would be a logical step to take in the short-term."

"We will continue analysing customer movement from time to time through different internal sources and work towards a much safer in-store environment."

"For a certain period of time or until we are 95% COVID-19 free and vaccinated, self-service points in our stores may exist for safety requirements."

"Post-lockdown we will still have to continue COVID-19 protocols and have crowd control. All the instructions issued by authorities will be followed for this purpose."

"Introducing more in-store signs will help us gain more control of safety and security."

"Our online solutions are expanding at a much faster rate."

"It is interesting to see that there is a split between those respondents that don't think it is a good time to invest in running physical stores at the moment and those that do. Controlling footfall will of course be a priority in the next 12 months to ensure safety but also it is interesting to see that investing in an online presence and omnichannel is going to ensure success for most retailers as well."

Lauran Allen,
Conference Director,
Future Stores 2021

"I totally agree with every comment that was provided here. As you can see, the majority of them are tied to providing a safety statement to their customers. Some of the respondents touched on leveraging technology to analyse footfall and personalise offerings. It is important to note that many retailers may still be detaching retail and technology as separate entities. They should realise that technology and retail are beginning to become one and the same. Technology should be leveraged to solve more and more problems, especially as retailers change layouts, lose space in the stores, and introduce new ways of serving customers."

Pavan Pidugu,
Chief Technology Officer, FMCSA,
U.S. Department of Transportation,
former Director of Digital Customer &
Omnichannel Experience, Walmart International

Before the pandemic, retail customers were already looking to gain more from visiting a physical store and many retailers were starting to provide unique experiences as a way to drive footfall and increase in-store transactions. To bounce-back, retailers will need to think outside of the box to find ways to make the in-store experience both enjoyable and safe as consumers seek exciting opportunities for community and convenient retail.

According to our survey, 55% of our respondents said their organisation is planning to change their store layout post-lockdown. This is one way that retail brands can increase engagement with their customers, by making their stores easier and safer to navigate in the short-term, ready to welcome shoppers back. Whatever route retailers decide to take, technology will play a key role. An occupancy management system can monitor footfall and, if connected to digital signage, communicate numbers to staff and customers. Digital signage could also play a role in communicating safety measures to shoppers and, as physical display space is allocated to stock storage, provide an 'endless aisle' for product display and exploration. Creative use of technology can create compelling shopping experiences that will win customers and bolster brand reputation.

PART THREE
Omnichannel Solutions for Retailers in 2021

Implementing a strong omnichannel strategy provides retail brands with different ways to connect to their customers. Omnichannel strategies also highlight where retail brands can optimise their stock levels, execute smarter replenishment protocols, and lets retailers fulfil their customers' orders from anywhere in the world.

In recent years, many retail brands have been implementing an omnichannel strategy. The COVID-19 pandemic has been a catalyst for retailers, especially for those that were behind the curve, to invest in and further improve their omnichannel capabilities. The shift of consumer spend toward ecommerce has been significant, and one of the main implications of this shift has been the enhanced role omnichannel has to play for retailers. Through an omnichannel retail strategy, retailers can reach their customers at every touchpoint in the customer journey, both online and offline, meeting the accelerated changes in customer needs in the wake of COVID-19.

According to our survey, it is important to have a successful omnichannel strategy that will put retail brands in a much stronger position post-lockdown. 53% of our respondents felt it was important to offer their customers an omnichannel experience (while 31% said it was potentially important, and 7% said it was extremely important).

However, while the majority of respondents did acknowledge the importance of having an omnichannel experience, 43% were not completely confident that their omnichannel offering was competitive. This data suggests that some retailers might be challenged by a lack of expertise in implementing a successful omnichannel strategy. To overcome this challenge, partnering with a strong technology provider is vital.

Pre-COVID-19 many retail brands tended to think of omnichannel as a mix of brick-and-mortar, a website and an app with little interaction between these three channels and often disjointed. With COVID-19, retail brands are now looking to leverage additional digital channels, such as social media and online marketplaces, and use the resulting data to improve their in-store strategy. Consequently, the line between in-person purchases and online purchases is quickly being blurred.

Our respondents said that they would be using online sales data to inform their in-store strategy in 2021. Leveraging online sales data will help retail brands to better target their product recommendations, determine product range, supplement staff training, integrate data for in-store marketing, and formulate better loyalty rewards.

Retail brands are also turning to third parties to drive their digital sales, which marks a redefinition of the omnichannel concept. This new view means that retailers must think of omnichannel as a comprehensive suite of ways in which a shopper can engage with a brand. These include a brick-and-mortar store, website, mobile app, social media, online marketplaces and fulfilment services.

53% of respondents said it was important to offer their customers an omnichannel experience

How important do you feel it is to offer your customer an omnichannel experience? Please rank your answer using the scale/answer options below.

15%	31%	46%	7%
Not important	Potentially important	Important	Extremely important
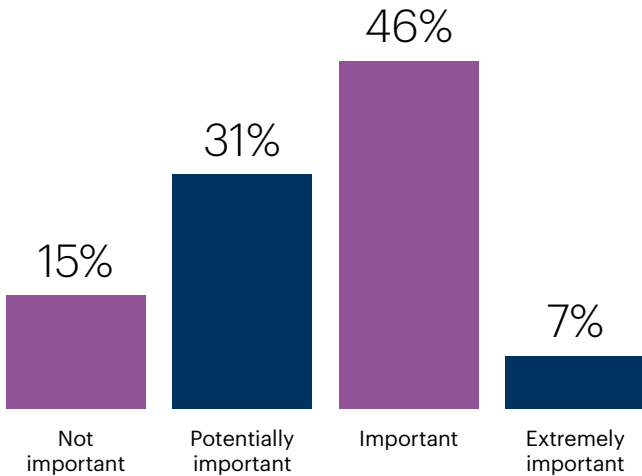
Some respondents have skipped this question during the survey.

"Lockdown and capacity restrictions have hit retail hard since April 2020 and many have had to innovate and re-think their omnichannel strategy as a result. It's not surprising that the majority of respondents ranked this as important, to extremely important during a time of uncertainty when they are not experiencing the same levels of footfall that they have been dependent upon in recent years to remain competitive. It's important for retailers to be agile in their response, focussing on being proactive rather than reactive when leading change transformation."

Lauran Allen,
Conference Director,
Future Stores 2021

"I would have expected 100% of respondents to believe providing omnichannel experience is very important. I think it is essential.

Omnichannel offering will provide retailers with many benefits, including increased operational efficiency, customers and sales, reaching new customer segments, surpassing the limitations of physical stores, a deeper understanding of customers and providing personalisation, incorporating interactive technologies, and many more."

Pavan Pidugu,
Chief Technology Officer, FMCSA,
U.S. Department of Transportation,
former Director of Digital Customer &
Omnichannel Experience, Walmart International

For those respondents that said omnichannel was at least potentially important for their customer experience, 57% said they are confident that their omnichannel offering is competitive

If you answered 3 or above to the previous question, how confident are you that the omnichannel offering of your business is competitive? Please rank your answer using the scale/answer options below.

1%	12%	30%	52%	5%
Extremely unconfident	Not confident	Somewhat confident	Confident	Extremely confident
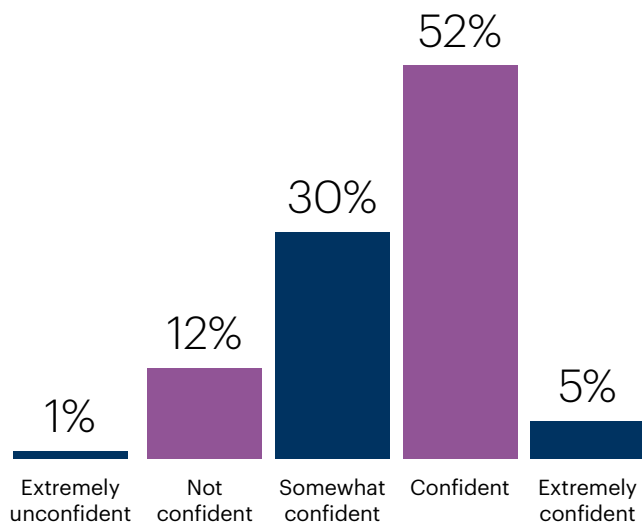
"It is interesting to see that the majority of respondents are confident in their omnichannel offering, compared to similar data from Future Stores reports in the past. As I mentioned earlier, it's becoming increasingly important for retail brands to provide a slick omnichannel offering and to have a digital presence since the impact of the COVID-19 pandemic."

Lauran Allen,
Conference Director,
Future Stores 2021

"Retailers should go completely on board with having an omnichannel presence. Those who are not confident yet or still waiting to see how things shape will eventually have a tough time to keep up with the lost opportunities and significant loss of customers. We have seen in many industries, the businesses that stay proactive and that adapt to change quickly survived and benefited. Those that didn't adapt in time became just a brand in history and are irrelevant in today's business.

I strongly encourage retailers to start building omnipresence. If doing so alone is scary, leverage partners. There are many digital and tech consulting organisations that help large retailers to achieve digital success. Digitising not only solves today's challenges but also will keep you ready to address challenges that we will see in the future."

Pavan Pidugu,
Chief Technology Officer, FMCSA,
U.S. Department of Transportation,
former Director of Digital Customer &
Omnichannel Experience, Walmart International

The top three ways our respondents will be using data from online sales to inform their in-store strategy this year will be for better targeting of product recommendations, helping to determine product range and to supplement staff training

How will data gathered from online sales inform your in-store strategy?

13%

19%

20%

22%

26%
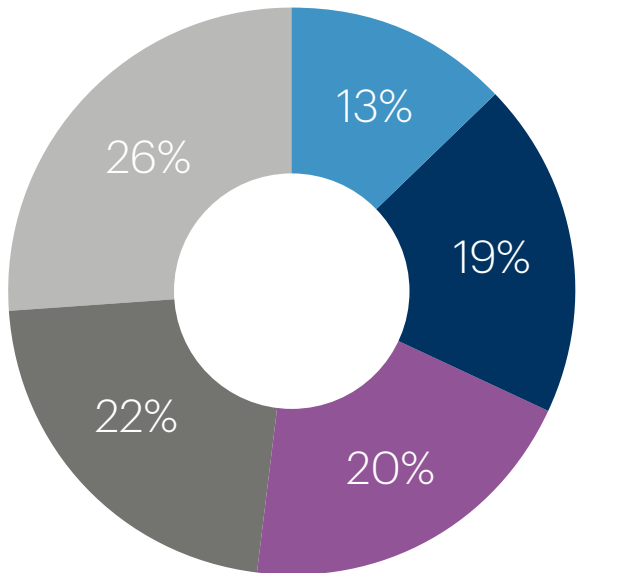
- Better implementation of loyalty/rewards
- Better integration of data when devising in-store marketing
- Online data will be used to supplement staff training
- Will help determine product range
- Better targeting of product recommendations

"It is interesting to see how most respondents are planning on using their data gathered from online sales. It is clear that retail brands will need to capitalise on new consumer trends and changing customer behaviour if they are to stay ahead of their competitors this year.

As customers have gotten used to shopping online, retailers will need to keep this up whilst they start to reopen their physical stores and join up these two platforms."

Lauran Allen,
Conference Director,
Future Stores 2021

"The key to creating a true omnichannel solution is not just offering a seamless customer experience across all touchpoints but also making the most of data received across those touchpoints. Brands that can analyse and use the information from customer interactions and ideally integrate it with AI functionality will gain invaluable insight and a competitive edge."

Chris Riegel,
CEO,
STRATACACHE and Scala

"Data is becoming the biggest currency one can have, especially the retailers. Personalised offerings is the first and very obvious way to leverage data and benefit. Data can also be further utilised to perform predictive analytics to prepare for the future.

At the beginning of the pandemic, we first saw the essentials such as food, milk etc. were sold out everywhere because of panic buying. Based on analysis from major retailers worldwide, after initial panic buying, the trend of completely sold out evolved in multiple varied categories from food to toilet paper, then to board games, then to personal grooming products, then to personal exercise equipment, bikes etc. Data can be leveraged to study the future and be prepared to address the customer needs in the future."

Pavan Pidugu,
Chief Technology Officer, FMCSA,
U.S. Department of Transportation,
former Director of Digital Customer &
Omnichannel Experience, Walmart International

It has been clear to see those who have and have not thrived in the retail industry during the COVID-19 pandemic. It may come as no surprise that those organisations that already had a strong omnichannel experience in place were the most successful in the last 12 turbulent months. Omnichannel will also play a vital part in the 'comeback' of the retail industry as customers start to emerge from lockdown restrictions, eager to reclaim the high street.

Make no mistake, ensuring retail success in 2021 will entail the regeneration of the physical store, and optimising the omnichannel offering will play a leading role. An omnichannel experience answers customer demands for safety and convenience, giving shoppers choice in browsing, purchasing, and receiving products. Brands also benefit from the information and insight gained across a variety of customer touchpoints. For those businesses unsure of how to integrate their existing offering into a full omnichannel experience, technology and experiential partners can offer valuable advice and operational support. Working with an experienced partner can make all the difference for brands looking to explore and enjoy the full potential of omnichannel retail.

PART FOUR

Marketing and Communications:
In-Store Analytics and Store Strategies

Retail in-store analytics are important for a wide variety of reasons. For instance, they provide insights into customer purchasing behaviour which can then be used to forecast stock requirements and predict future demand. Not only that, but these tools can also reveal how to better price or promote products and in-store services more effectively to help increase revenue, as well as shedding light on where retailers can optimise their supply chain in the future.

In the past, some retailers have been using in-store analytics, POS etc. to track consumer behaviour across loyalty programs and monitoring the most popular products. However, since the impact of COVID-19, tracing the customer journey has proven elusive for brick-and-mortar stores for obvious reasons during lockdowns and other restrictions.

As the restrictions ease, this technology presents a new opportunity for retail brands looking to optimise their brick-and-mortar real estate and rebuild their in-store customer experience. With the widespread adoption of omnichannel commerce, personalisation and experience are the key drivers of traffic and conversions. Retailers can now start to look towards utilising this data to re-design their shop floor, prioritise safety, and refine in-store messaging.

Although ecommerce websites enjoy direct access to analytics such as path-to-purchase, cart abandonment, dwell time, traffic, and conversion, similar data can also be gathered in physical stores using sensor technology. For example, brands can measure dwell, pathing, even where the actual shopping cart is physically in the store. And this information can be gleaned in almost real-time.

In-store sensors are also being used by retail brands to gather customer data to help them build a more personalised experience when shoppers visit physical stores. This technology can also help retailers to customise their digital displays and promotional messaging.

In the past, some retailers have experimented with numerous technologies in their brick-and-mortar stores, such as beacons, Wi-Fi, and video analytics to measure foot traffic and conversions. However, common challenges included being constrained by privacy regulations as well as the overall cost and complexity of implementing this technology. Although challenging for retailers, these obstacles can be overcome by working with the right technology partner, such as Scala, and implementing an appropriate solution such as Walkbase IntelliCount. Working with a responsible and strategic partner should result in an optimised customer experience with less friction along the path to purchase.
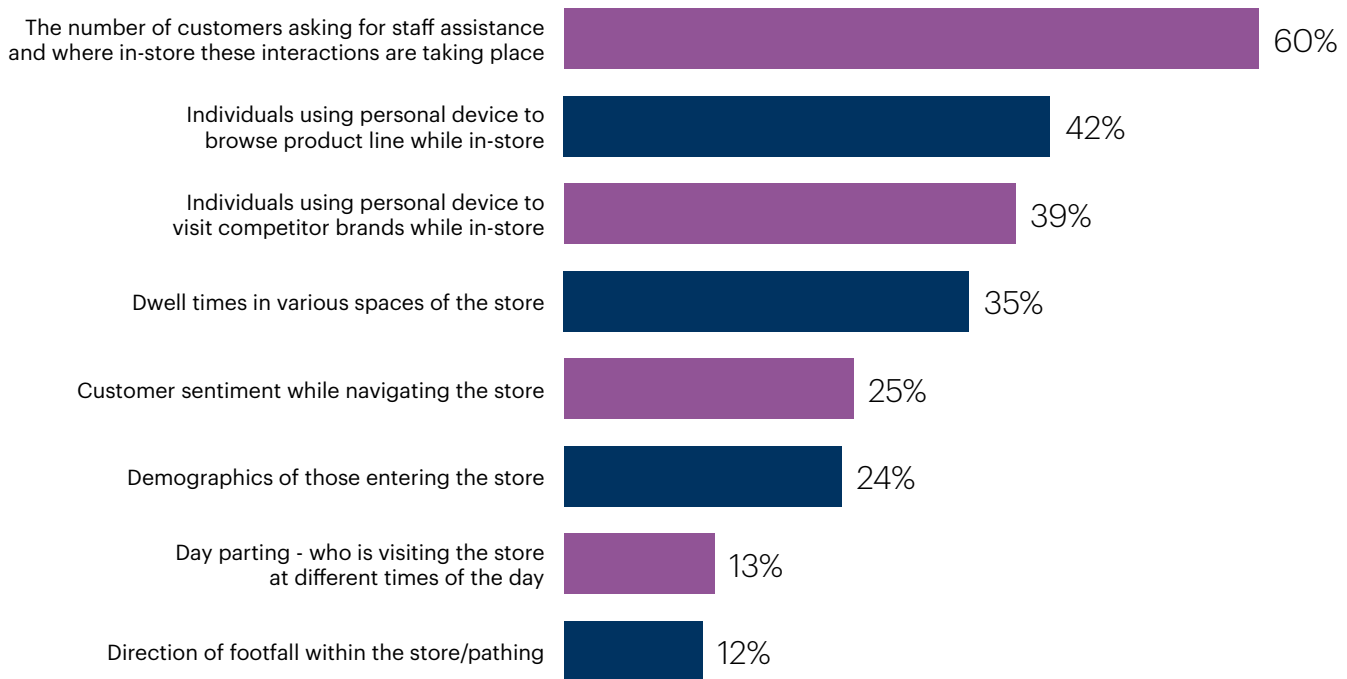
According to our survey, the use of in-store sensing and analytics is rapidly gaining traction as a strategy to breathe new life into retailers post-lockdown. 95% of our respondents stated that all or some of their stores are currently using in-store sensor systems to gather data.

Of these, 62% said they are using this data to determine product placement in-store, 52% said they are using the data to gain insight on traffic and dwell times, while 37% said they are using the data to determine displayed marketing messages.

When asked about what information would help determine store strategy, most of our respondents stated that the number of customers asking for staff assistance and the locations within the store where these interactions are taking place would be the most helpful information.

The majority of our respondents said that the number of customers asking for staff assistance and where in-store these interactions are taking place would be the most useful information to determine their in-store strategy in the next year

Thinking of your in-store plans for the next year, what information would be useful for determining in-store strategy? Please select all that apply.

The number of customers asking for staff assistance and where in-store these interactions are taking place	60%
Individuals using personal device to browse product line while in-store	42%
Individuals using personal device to visit competitor brands while in-store	39%
Dwell times in various spaces of the store	35%
Customer sentiment while navigating the store	25%
Demographics of those entering the store	24%
Day parting - who is visiting the store at different times of the day	13%
Direction of footfall within the store/pathing	12%

"The majority result here is unsurprising. Keeping both customers and store associates safe as we come out of the pandemic is paramount as well as providing a slick experience when customers return to stores."

Lauran Allen,
Conference Director,
Future Stores 2021

"Data gathered from interactions within the store offer huge insight and opportunity to retailers. Linking sensors with signage provides real-time data on the effectiveness of the communications displayed and can be used to schedule more relevant customer messaging. Sensors can determine dwell time, demographic information and more. We have also worked with high street brands on implementing eye-tracking to optimise messaging and communications with measurable results."

Harry Horn,
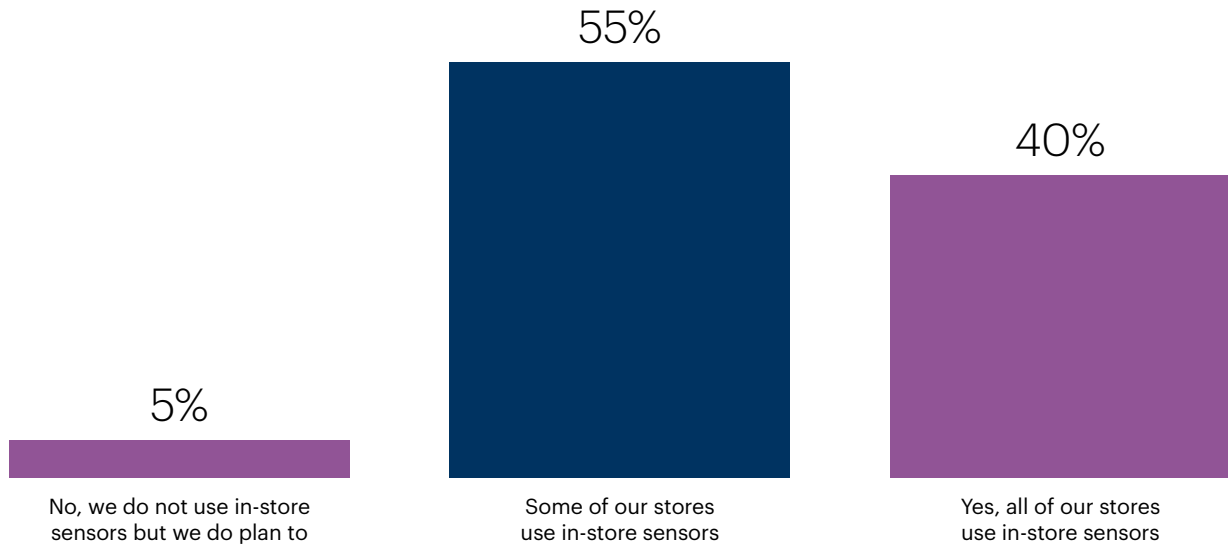**VP Marketing Global & GM EMEA,**
Scala

"As store layouts change, so will the usual placement of items where customers are familiar with from the pre-pandemic era. It is also interesting to see that the respondents were also interested to learn about what their customers are searching for while they are visiting a physical store. I would say, integration of first and second, can provide retailers a significant amount of data to determine their in-store strategy. While serving for the largest retailer, I have leveraged technology in solving multiple business problems including in-store navigation, personalised product offerings and most importantly provide alternate checkout solutions that allow customers to not wait in line to exit the store.

In conclusion, I think every retailer should focus on providing a safer shopping experience, a convenient shopping experience, and most importantly a memorable shopping experience that will make them come back. The best and only way to address all of these three things is by being an early adaptor to innovative technology solutions that are already available in the market today."

Pavan Pidugu,
Chief Technology Officer, FMCSA,
U.S. Department of Transportation,
former Director of Digital Customer &
Omnichannel Experience, Walmart International

The majority of respondents said they are currently using in-store sensor systems to gather data

Do your store(s) currently use in-store sensor systems for data gathering?

55%

40%

5%

No, we do not use in-store
sensors but we do plan to

Some of our stores
use in-store sensors

Yes, all of our stores
use in-store sensors

"I am not surprised to see that the majority of respondents either use in-store sensors in all of their stores or some of their stores to gather data. This is becoming increasingly important for retailers in a post-pandemic world to determine and enhance their customer experience.

Although this technology has been around for quite some time and is now gaining more ground, it has come to the point where it can really help retailers transform their physical stores to benefit their customers shopping experience. From scan-as-you-go handheld devices to mobile apps for driving growth and increasing spending to sensor-based technology and data analytics to help retailers better understand their customers, this space is definitely going to be growing in the next five years."

Lauran Allen,
Conference Director,
Future Stores 2021

"Like I mentioned earlier, more data is always better, as long as the retailers have the right tools to analyse the data and make good use of it. We are continuing to see various evolutions of data-collecting sensors and will continue to see more shifts.
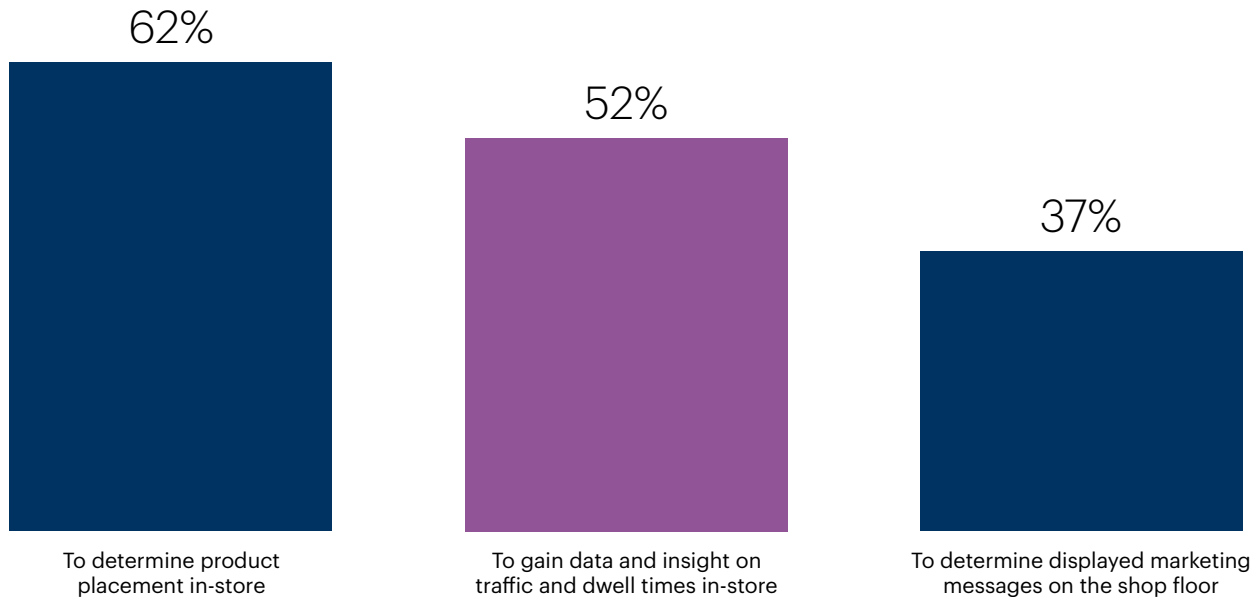
Like I said, gathering data is only the first step. It is important to have the right tools to analyse the data, strategies to benefit from the data that has been gathered and analysed."

Pavan Pidugu,
Chief Technology Officer, FMCSA,
U.S. Department of Transportation,
former Director of Digital Customer &
Omnichannel Experience, Walmart International

Of the 95% of respondents that said their organisations are using in-store sensor systems to gather data, 62% said they are using this to determine product placement in-store

If your brand does use in-store sensors, how do you use them? Please select all that apply.

62%

52%

37%

To determine product placement in-store

To gain data and insight on traffic and dwell times in-store

To determine displayed marketing messages on the shop floor

"In-store data sensors can offer real insights into how retailers use visual merchandising to the best effect in their physical stores and to understand their in-store traffic and dwell times throughout the day. Across the retail industry data analytics capabilities are becoming crucial as the physical and digital shopping experience blends into each other. This data can also help drive digital marketing strategies, in-store layout and optimise customer experiences to name but a few."

**Lauran Allen,
Conference Director,
Future Stores 2021**

"I think the important thing to note is how retailers can leverage the data to meet the customers' needs. Various solutions are in place that help retailers with multiple studies and analyses that provide different opportunities. Retailers can only benefit from such rich data analysis if and when they take meaningful actions based on that data. The strategies that retailers can use and benefit from gathering data are limitless, and I see it transforming in many ways in the next five years.

Like I mentioned earlier, the early adopters will have a huge advantage over the laggers."

**Pavan Pidugu,
Chief Technology Officer, FMCSA,
U.S. Department of Transportation,
former Director of Digital Customer &
Omnichannel Experience, Walmart International**

Of the 95% of respondents that said their organisations are using in-store sensor systems to gather data, 57% said they are not integrated with their digital displays

If your stores do use in-store sensor systems to gather data, are these systems integrated with your digital displays?

57%

43%

● No
● Yes
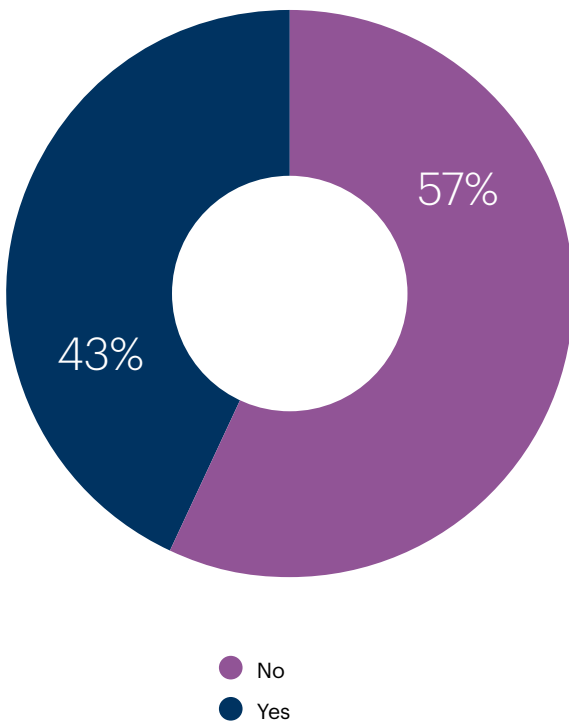
"It is interesting to see that the majority of respondents whose organisations are currently using in-store sensor systems are not currently integrating them with their digital displays. Perhaps they have not yet gotten the capabilities for this. I certainly believe this will change over the next 5 years as demand and technology evolves."

**Lauran Allen,
Conference Director,
Future Stores 2021**

"I am not surprised with such a low number that actually have all of their technology solutions integrated. It is not common for many businesses that implemented various technologies in silos. It made sense to do it like that at the time. It was not the case just with retailers but was a common theme across many industries. With deeper understanding of what technology can offer and a broader understanding of various use cases/business opportunities, retailers are investing to integrate technologies by creating technology platforms or eco-systems than systems in silos. There are many opportunities for many retailers to advance in their technology integrations."

**Pavan Pidugu,
Chief Technology Officer, FMCSA,
U.S. Department of Transportation,
former Director of Digital Customer &
Omnichannel Experience, Walmart International**

In-store analytics tools and technology have been used by retailers before the COVID-19 pandemic and many retail brands have started to realise the potential they bring from a data mining perspective. However, our survey revealed that although many retailers are currently using analytical technology in their stores, there are some gaps where they can improve how they integrate different technologies together to enhance their data gathering potential.

For example, the respondents' organisations that are currently using in-store sensor systems, 57% of them have not yet started to integrate this technology with their existing digital display and digital signage systems. It is positive to see that there are several opportunities yet to be capitalised on for retail brands when it comes to collecting data on their customers' in-store behaviour. Integrating sensors with signage can unlock huge potential and ROI for brands. Retailers should talk to technology partners about what is possible and the ways in which the right integrated solution can cut waste and create more opportunities for sales and deeper customer loyalty.

CONCLUSION

In 2021, retailers are faced with a myriad of challenges. Post-lockdown, many customers will continue with social distancing and some might prefer to avoid brick-and-mortar stores in the short-term. However, there is light at the end of the tunnel with the vaccine rollout.

In the meantime, retail brands will need to innovate to encourage customers back into their stores in the months ahead. Although online is likely to remain an important touchpoint for shoppers, the majority of retailers recognise the value of attracting customers to stores.

Our respondents remain pragmatic and are working towards adding self-service options, geo-gating/ mobile point of sale functionality, street-facing display technology and improving their online fulfilment capabilities in their physical stores.

Retailers will need to re-think how they are going to be using their physical retail real estate. It is interesting to see that most of our respondents did not recognise the potential of the car park as a space for sales, collections, fulfilment or returns. However, many respondents realise the need to change their store layouts to gain more control over in-store safety.

Providing customers with an omnichannel experience will help retail brands to rebuild post-lockdown. The majority of our respondents felt that it is crucial for their organisations to offer customers an omnichannel experience. However, 43% of respondents said that they are not confident that their omnichannel strategy is competitive.

Now retail brands need to assure customers of their safety in-store. Technology such as occupancy management systems and digital signage can do a lot to maintain and communicate safety measures. When not needed for safety purposes, this flexible technology can be utilised to offer a more convenient experience to customers – letting them know of potential wait times or promoting key product lines.

By utilising new technology, such as in-store data sensor systems and signage, retail brands will be able to provide the customised experience their customers are looking for. Introducing and integrating in-store technology will not only provide a convenient and seamless experience for the customer but will also deliver real ROI for the brand, keeping them not only competitive for now but also the future.

About Scala

With 30 years of experience entertaining, informing and educating audiences, Scala, a STRATACACHE company, is known globally for innovation and leveraging emerging technologies to create award-winning solutions that are infinitely customisable. Scala solutions allow you to create audience engagement experiences by connecting networks of digital signs, kiosks, websites, mobile and internet-connected devices. Scala provides the platform for marketers, retailers and innovators to easily create and centrally manage deployment of these digital experiences, while retaining the flexibility to rapidly adapt to local business conditions and audience preferences in real-time. Headquartered near Philadelphia, PA with a European head office in Sittard, Netherlands, Scala's network of partners and developers located in more than 90 countries drives more than 500,000 screens worldwide. https://www.scala.com/en/

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