WHAT'S DRIVING TOMORROW'S RETAIL EXPERIENCE?

A LOOK AT CHANGES IN THE INDUSTRY AND THE SOLUTIONS INFLUENCING THE FUTURE OF RETAIL

OVERVIEW

Decades ago, retail was based on relationships: When people walked through the front door, the merchant personally greeted them and asked how they could help. Customers trusted the merchant to help them with what they needed and educate them about new items on the shelf.

Over time, the personalized approach was lost and consumers no longer felt the same loyalty to the retailer. Today, retailers are working to enhance their shoppers' experience, knowing that at the same time customers have options to shop wherever and whenever they want, often without stepping inside a store. Retailers have to anticipate a shopper's buying behavior, whether the route they take begins with a website, social site or the parking lot outside of their store. They need to provide a compelling and personalized way to rekindle the special bond between the shopper and their brand. It's complex and confusing. But it also provides immense opportunities.

Following on Motorola Solutions' Annual Holiday Survey in December 2011, we conducted a survey of 250 U.S.-based retail executives in May 2012 to understand what impact omni-channel retail trends are having on their business, the drivers to change and their plans to use mobile technologies within the next five years. The survey shows that merchants today are struggling with meeting consumers' "want it here, want it now" mentality while finding the right balance between their online presence and brick and mortar store locations.

This paper examines the future of retail, including changing shopper mindsets and behaviors, and the new expectations shoppers have for their in-store experience.

RETAILERS BELIEVE

IN THE NEXT FIVE YEARS:

41% expect to provide personalized product details, based on previous behavior, to a shopper's smartphone.

35% expect to recognize their customers in the store with geofencing or presence technology.

42% expect to send coupons based on a customer's location in the store.

56% of all transactions will be completed via mobile point of sale, self checkout at a terminal or on a shopper's mobile device.

42% of sales will come from online, mobile and social commerce sites.

74% of the retailers surveyed believe that developing a more engaging in-store customer experience is going to be business critical.

Source: Motorola Solutions' "Retail Vision Survey," May 2012

THE FUTURE OF RETAIL IN AN OMNI-CHANNEL WORLD

OMNI-CHANNEL RETAILING IS ABOUT GIVING CUSTOMERS A SEAMLESS, CONSISTENT EXPERIENCE, WHETHER IT'S IN-STORE, ONLINE OR THROUGH A MOBILE DEVICE.

Shoppers' habits are shifting as more consumers adopt smartphones. These smartphone users are utilizing their devices in the store for a range of uses including shopping lists, product reviews, price comparison or just to send a picture to a friend about the new item they found on sale. Consumers have a specific expectation of their retail experience and getting the information they want when they want it—inside or outside the store.

This shift in consumer behavior is causing concern among retailers that they are being eliminated from the conversation. In fact, 61% of shoppers believe they have access to more information about products than store associates[1] and 73% of those shoppers would prefer to use their smartphone rather than engage a store associate[2]. This loss of contact is forcing the retailer to consider the behavioral analytics of the shopper and how they can restore the in-store relationship.

VISION	REALITY
What if retailers knew who was in the store and empowered shoppers to use their own mobile phone to communicate – with the brand, the associates, even the products?	More than 50% of retail stores will provide guest access within five years. The consumer can connect to the store's wireless guest access, and opt-in to receiving welcome messages, personalized store maps, product data and customized offers from the retailer.
What if a retailer could mesh the consumer's online digital experience with the physical, in-store experience?	Consumers are researching, creating shopping lists and purchasing items before ever coming into the store. By understanding the shopper's purchase path, proactive information can be provided to the store associate to personalize and expedite the shopping experience while providing the consumer choices about where to buy and how an item is delivered, at the store or at home.
What if sales associates could know as much about shoppers they're helping as the online retailer does, and engage them with the exact information they need, when they need it?	61% of shoppers believe that they are better informed than store associates. In contrast, 67% of shoppers cited a better experience in-store with associates and managers who use the latest mobile technologies[3].
What if a store shelf notified associates when the last item was taken, so they could replenish it before a customer even noticed?	Out-of-stock items are the leading cause for customer dissatisfaction. RFID and video analytic technology can identify a potential issue and immediately alert the appropriate store associate's mobile device that corrective action needs to take place.
What if retailers could anticipate what might make consumers walk away unsatisfied and intervene to make the sale (or at least reinforce the brand for future opportunities)?	Retailers increasingly use business intelligence for market basket analysis, store traffic data and other measurements. A mix of technologies (i.e. video, proximity awareness, POS) capture information with the analytical output sent to the appropriate mobile devices used on the store floor by the manager and associate to engage the consumer and close the sale, or simply take action to avert an abandoned basket.

As the majority of purchases will still occur in the brick and mortar store, it is incumbent on the store to leverage the right technology to give customers the same kind of information and experience they get online, but with the added familiarity and immediacy of an in-person visit. Almost three-quarters of surveyed retailers believe that maintaining an engaging customer experience is going to be business-critical over the next five years. The best place to start is by looking at technology's role in the customer experience.

[1] Motorola Solutions' "Retail Vision Survey", May 2012
[2] Motorola Solutions' "Annual Holiday Shopper Survey Results," December 2011
[3] Motorola Solutions' "Retail Vision Survey", May 2012

Q: "WHAT ARE THE PRIMARY DRIVERS FOR INVESTMENT IN TECHNOLOGIES FOR YOUR ORGANIZATION?"

IMPROVING CUSTOMER SERVICE IS THE PRIMARY DRIVER FOR INVESTMENT IN TECHNOLOGIES

THE TECHNOLOGY DIVIDE

Without change, the retailer will fail to meet connected shoppers' expectations and will find it even more challenging to make the investments needed to catch up with their customers and their competitors.

As many long-standing brick and mortar stores redesign, reduce in size or even close as they are unable to meet the needs of this newly empowered shopper, it might seem as though the momentum is swaying in favor of online. But that is not the full story. While total retail sales will be equally spread in and out of the store due to the increased number of high price item transactions online, the total number of actual transactions will still be more often conducted in store.

Retailers with brick and mortar stores have incredible advantages, if they can create the right experience and product mix. The enabling differentiator will be the ability to responsibly and reasonably harness the power of technology to better understand customers and learn what additional opportunities might exist.

RESETTING THE PATH TO PURCHASE

THE OPTIMAL SHOPPING EXPERIENCE IS WHEN BROWSING BECOMES BUYING, CUSTOMERS BECOME BRAND ADVOCATES AND RETAILERS INFLUENCE THE PURCHASE PATH. THE PURCHASE PATH IS DEFINED AS:

IDENTIFY	NAVIGATE	DISCRIMINATE	VALIDATE	TRANSACT
SHOPPER SELECTS A RETAIL DESTINATION	SHOPPER TRIES TO LOCATE A SELECTION SET	SHOPPER SEEKS TO EVALUATE AMONG RELEVANT ALTERNATIVES	SHOPPER LOOKS TO CONFIRM A PURCHASE DECISION	SHOPPER READY TO COMMIT TO THE PURCHASE

83% of retailers recognize that shoppers can easily find a better deal elsewhere, making customer service as important as ever[4]. Yet, retailers and their store associates aren't delivering on expectations their shoppers have for them, and both shoppers and retailers know it.

At every step of the purchase path there is a compelling opportunity to improve the experience for the shopper by using technology to drive them to close the sale.

[4] Motorola Solutions' "Annual Holiday Shopper Survey Results," December 2011

IDENTIFY

Consumers want to feel confident that the retailer has what they are looking for and feel welcomed and engaged when they enter the store. It is the retailer's best opportunity to set the right tone and desire to make a purchase. But too often this is a lost opportunity.

- **Staff not available to greet**
- **Past relationship not recognized**
- **Pre-trip research, planning doesn't carry into the store**
- **Don't know where to find what I need**
- **Unsure what's new that I want**

- **Shopper is confident the store has what they need**
- **Shopper digitally welcomed and assisted upon entering**
- **Personalized map and guide to today's shopping experience delivered to handset**
- **Profile-based custom messages and offers delivered**

- **Connected shopper mobile applications**
- **WLAN guest access**
- **Customer profiling and locationing**
- **Video recognition**

RETAILERS STATED THAT:

76% **FAIL TO KNOW WHEN A SPECIFIC CUSTOMER IS IN THE STORE.**

85% **CANNOT CUSTOMIZE A STORE VISIT.**

89% **ARE UNABLE TO CONNECT CUSTOMERS' ACTIVITIES ONLINE WITH WHAT THEY DO IN THE STORE TODAY.**

As retailers understand the issue, the good news is more than 75% of the same retailers plan to address these customizable experiences within the next five years. That same sample told us 56% have or are planning to integrate their store systems with their online or social networks[5].

[5] Motorola Solutions' "Annual Holiday Shopper Survey Results," December 2011

NAVIGATE

80% percent of the average shopper's wasted time falls in the areas of "where is it?" and "which one should I choose?"[6] This wasted time means that both the shopper is unsatisfied and the opportunity for this time to be used discovering new products is lost.

40%

OF RETAILERS IDENTIFIED THE INABILITY TO FIND THE ITEM THEY CAME TO PURCHASE A MAJOR SOURCE OF CUSTOMER DISSATISFACTION, SECOND ONLY TO OUT-OF-STOCK SITUATIONS.

73%

OF RETAILERS ARE INVESTING IN TECHNOLOGY TO KNOW WHERE A CUSTOMER IS IN THE STORE. THEY ARE LOOKING TO INFORM SHOPPERS THROUGH SOLUTIONS SUCH AS DIGITAL SIGNAGE DISPLAYS, ELECTRONIC SHELF LABELS AND HANDHELD PERSONAL SHOPPING ASSISTANTS.

- **Don't know where to find an area of the store**
- **Look at signage to navigate**
- **Need to go back to customer service for help**
- **Have to wait for assistance to arrive**

- **Every associate is virtually connected and empowered to assist shopper**
- **Shoppers can use their own smartphone to instantly connect with an available associate in the store**
- **Intelligent task manager identifies, auto-dispatches the right associate**

- **Integrated communication between shopper and associate**
- **Personal shopping**
- **Task dispatch and workflow services**

By equipping associates with devices that give them the ability to look up stock location status and inventory levels, associates answer consumers' questions confidently and accurately the first time. And, when all associates have a way to communicate with one another via voice or data, even the newest associate can be as knowledgeable as the retailer's best associate through the push of a button.

This past holiday season, one-third of store visits ended with an average of $125 unspent due to missed opportunities to purchase driven by out of stocks, limited store associate assistance, inefficient payment approaches and deal-habituated behavior [7].

[6] http://www.ftpress.com/articles/article.aspx?p=1340017
[7] Motorola Solutions' "Annual Holiday Shopper Survey Results," December 2011

DISCRIMINATE

Getting the right information about a product becomes more important as the decision risks, such as cost or social implications of a wrong purchase, increase. If the retail store is going to address the perceived deficiencies they have versus online retailers, better inventory visibility and information is a good place to start. 41% of shoppers were not satisfied with the ability to receive in-stock status while in-store compared to only 20% of online shoppers.

TODAY

- **Not sure what's in stock**
- **Don't know how quickly I can get it**
- **Not sure what options are available**
- **Can't find associate to help**

TOMORROW

- **Continuous, real-time inventory locates any item shopper seeks**
- **Clear visibility to options available and able to compare**
- **Item condition is assured through smart tags that track and store the item "experience"**
- **Virtual gap scans monitor inventory and ensure products of interest are on the shelf**

SOLUTION ENABLERS

- **Assisted selling**
- **Smart inventory**
- **Extended aisle**
- **In-store locationing**
- **Dressing room assistant**

38% of shoppers were likely to use a retailer's wireless internet access to search for product information and post to the web while shopping. When one person posts a review, their friends will see the review. The extended network will then see the review and so on, multiplying the impact of one post. When considering if he or she will come back as a loyal shopper, consumers often asks:

- "What retailer has the type of item that I'm looking for in its assortment?"
- "What is the likelihood that a particular retailer that carries that item will have it in stock at a fair price?"

55%

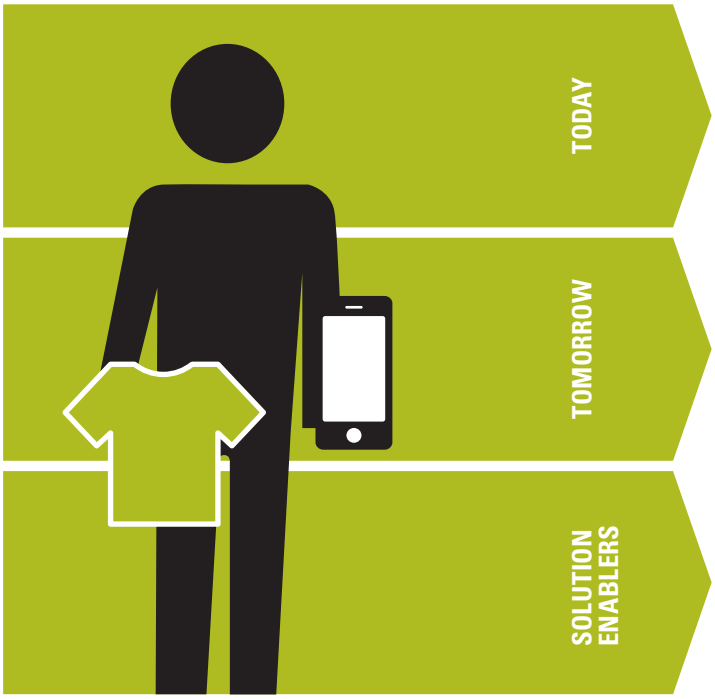
OF SHOPPERS WOULD HAVE MADE THEIR PURCHASE IF AN ASSOCIATE COULD FIND ANOTHER LOCATION THAT HAD THE ITEM IN STOCK AND NAVIGATE THE SHOPPER TO THAT LOCATION.

68%

OF THOSE LOST SALES MAY HAVE BEEN RECAPTURED IF A RETAIL ASSOCIATE WAS ABLE TO ORDER THE ITEM AND HAVE IT DELIVERED TO THE SHOPPER'S HOME.

VALIDATE

Getting over the last mile of a purchase decision is usually the hardest, but it is an area where solutions can make a significant difference. Customers have something in their hand that can result in the sale, but the concern that they don't have complete information that may result in harm, whether financially or emotionally, keeps them from making the purchase.



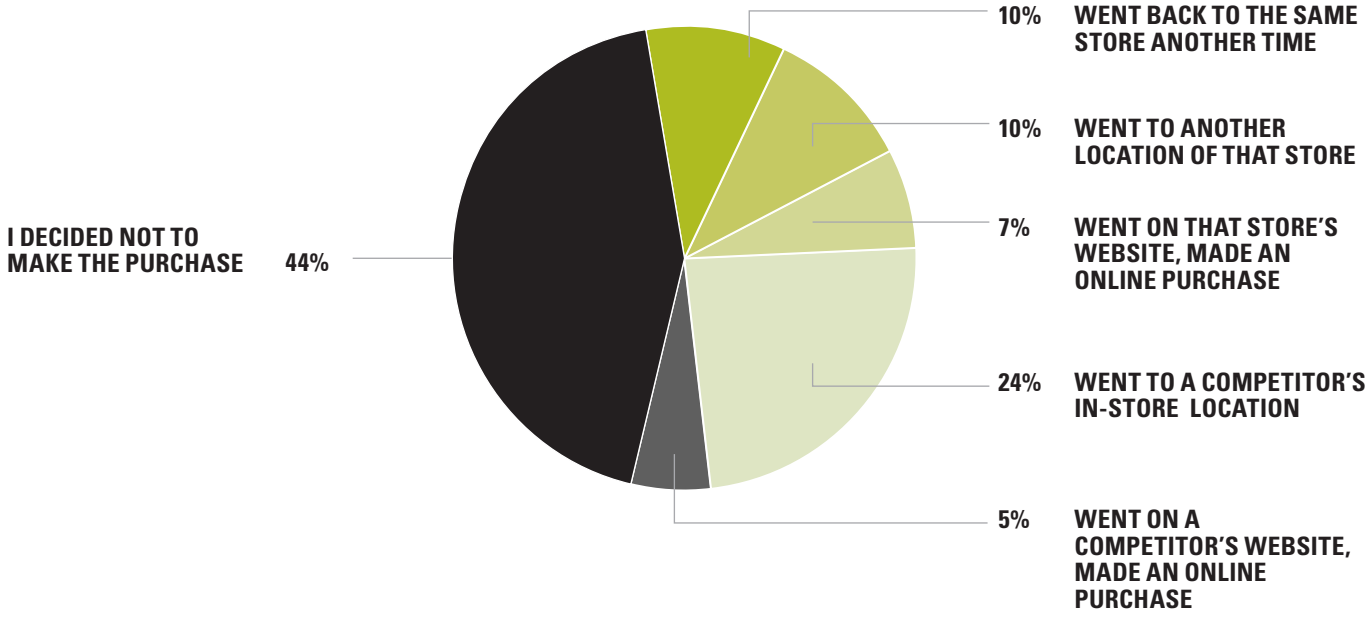
- **I have doubts about my selection**
- **Have to leave store to price compare**
- **I question "recommendation" of associate**
- **Not sure what special pricing or offers apply to me**

- **Multi-media, interactive presentation displays inform the shopper's purchase decisions**
- **Real-time, in-aisle price comparison with alternate retailers helps shopper commit**
- **Pricing system calculates custom offer based on shopper's loyalty score and business goals**

- **Workforce management**
- **Interactive digital signage**
- **Connected expert**
- **Business analytics**

It is important that you can provide them with all the information they need on the spot to stop them from walking out the door without making a purchase. Once a customer walks out the door, the sale is more than likely lost.

What did you do to find and finish purchasing these items? [6]



[6] Motorola Solutions' "Annual Holiday Shopper Survey Results," December 2011

TRANSACT

The checkout process is critical, as it usually sets the tone for whether or not a retailer makes the selection set for the next shopping trip. The immediacy of online checkout has increased the expectations that customers have in this part of the shopping process. Yet, it also doesn't need to be an independent piece of retailers' operations.

TODAY

- **I'm frustrated and slowed down by checkout**
- **Too few open lines**
- **I can't find my coupon**
- **I don't know if I've reached my budget threshold until I'm rung up**
- **I'm treated the same as any shopper**

TOMORROW

- **Customer count, line length, dwell times, and traffic patterns trigger allocation of associates**
- **Mobile computing device and payment terminal securely transact**
- **Shoppers securely scan and purchase items directly from their device, no assistance needed**

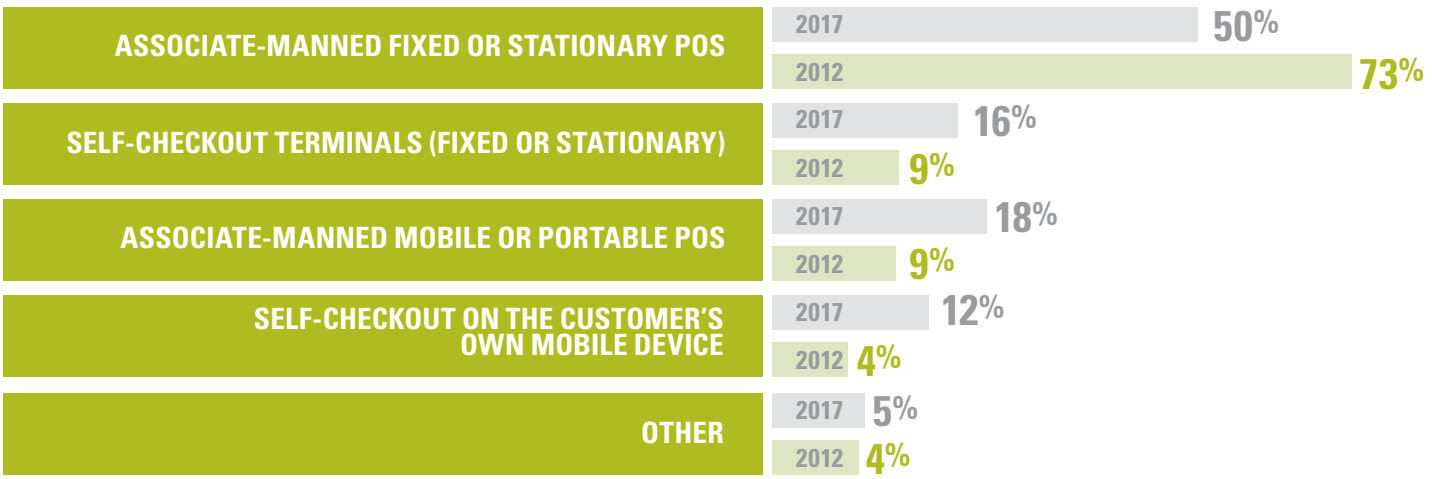
SOLUTION ENABLERS

- **Mobile point of sale**
- **Secure payment**
- **Smart video analytics**
- **Mobile bar code scanning**

In 2010, Home Depot armed its associates with portable devices that help them with everything from stocking shelves to making phone calls to checking out customers from anywhere in the store, not just at the traditional cash register.

> We have not historically done very well from a checkout perspective. We wanted to have a faster, more friendly and more efficient checkout process for our customers. We renewed the training, we created an enhanced focus, and our greatest improvement in service is in our front end scores. Customers love somebody to just walk up and ring them up right there and they can go out the door.
>
> -Marvin Ellison, Home Depot's EVP of U.S. stores

The checkout process is definitely changing. The following shows the percentage of surveyed retailers that are currently offering various checkout options and what they anticipate their options to be in the next five years.



EMERGING ATTRIBUTES OF RETAIL

THE VARIOUS SCENARIOS OF THE SHOPPER'S EXPERIENCE BOIL DOWN TO A RETAILER ATTAINING AN OMNI-CHANNEL ENVIRONMENT THAT ACHIEVES FIVE ATTRIBUTES.

These attributes will be almost impossible to achieve without integrating mobile technology to shape the future retail environment.

ATTRIBUTE	DEFINING FACTORS
CONNECTED	Shoppers will connect with associates, associates to one another, and both will connect to all the necessary information regarding the store's products. We found that 61% of surveyed shoppers felt they were better connected to consumer information, including coupons, competitive pricing and product availability, than store associates[7].
PREDICTIVE	The collection, analysis and distribution of data regarding customers, products and other operational elements will allow retailers and associates to anticipate customers' needs and exceed expectations. One-third of store visits ended with an average of $125 unspent due to missed opportunities to purchase driven by inefficient payment approaches, deal-habituated behavior, out of stocks and limited store associate assistance[8].
PERSONAL	Only information that's applicable to the user will be presented, which cuts through the clutter of useless information. In five years, 41% of retailers expect to provide personalized product details based on previous behavior to a shopper's smartphone[9].
CONTEXT AWARE	The store system recognizes location, identity, activity and time related to individuals and products to generate intelligent events. More than 35% of retailers expect to recognize their customers in the store with geofencing or presence technology[10].
CONSISTENT	Customers will receive consistent experiences across all channels - information, purchase and return expectations, and branding. With an effective omni-channel strategy, many lost sales could have been saved. Approximately 68% of lost sales could have been recaptured if a retail associate was able to order the item and have it delivered to the shopper's home. Another 55% would have made their purchase if an associate could find another location with that item in stock[11].

EVALUATING THE RIGHT STEPS FOR YOUR ORGANIZATION

IMPLEMENTING TECHNOLOGY FOR THE SAKE OF TECHNOLOGY AND WITHOUT THE RIGHT PROCESS FOR UNDERSTANDING AND PROPERLY ANALYZING DATA TO LEARN FROM TRENDS IS POINTLESS.

The future belongs to the retailers that implement and harness the best tools and flexible ownership models to create value-based, one-on-one relationships with shoppers.

With a clear understanding of the purchase path of the shopper, a view of how to improve it for tomorrow, and the attributes necessary to make it effective, you can develop the strategy, business process and objectives you want to focus on.

To get the best results, you a need a strategic partner who has the domain expertise to know what it takes to clearly define, realize success and can help you every step of the way from strategy and planning to implementation and third-party collaboration.

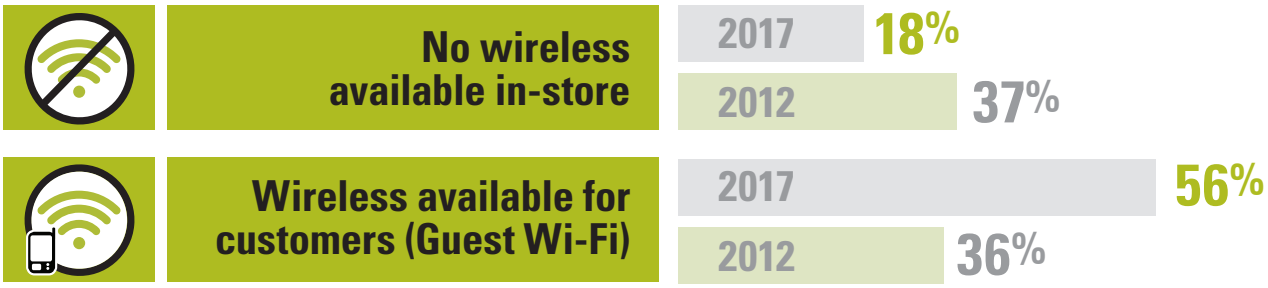
So, how do retailers get there?

[7] Motorola Solutions' "Annual Holiday Shopper Survey Results," December 2011
[8] Motorola Solutions' "Annual Holiday Shopper Survey Results," December 2011
[9] Motorola Solutions' "Retail Vision Survey," May 2012
[10] Motorola Solutions' "Retail Vision Survey," May 2012
[11] Motorola Solutions' "Annual Holiday Shopper Survey Results," December 2011

STORE WIRELESS

WITHOUT A WIRELESS NETWORK, THERE ISN'T THE ABILITY FOR ASSOCIATES TO BE MOBILE AND STAY CONNECTED.

The desire to stream video to kiosks and signage, complete mobile transactions and begin to open access of the wireless network to shoppers places an increased demand on the capabilities, architecture and security of these networks. The number of devices that need to be running on these networks and the amount of data that transpires have significantly multiplied over the last three years.



Tracking the usage of customers who have opted in to advanced services on these networks can provide retailers with a window into customer habits and popular products. This process – the collection, analysis and distribution of data regarding customers, products and other operational elements – allows retailers and associates to be ahead of their customers' needs.

CUSTOMER ENGAGEMENT AND CROSS CHANNEL EXPECTATIONS

CUSTOMERS TODAY DON'T SEE THE MANY CHANNELS THAT RETAILERS HAVE AS DISTINCT AND DIFFERENT, RATHER, THEY VIEW THIS AS QUITE THE OPPOSITE AND EXPECT THAT RETAILERS RECOGNIZE SHOPPERS ACROSS ALL OF THEIR ACTIVITIES PERFORMED WITH THEM.

THEREFORE, WHY WOULDN'T OMNI-CHANNEL RETAILERS KNOW HOW SHOPPERS HAVE INTERACTED WITH THEM ONLINE, ON THEIR MOBILE AND IN THEIR STORE?

83% of shoppers went online to research a product before going to the store to buy it. That data, combined with other activities and when coupled with analytics, presents store associates (or shoppers themselves) with the most appropriate information to help with their shopping experience.

Where online retailers quickly benefit is in their ability to offer a personalized shopping experience: They know past purchasing trends, what products a customer has researched and what other online vendors the customer has visited. They can make product recommendations quickly, sometimes before the customer knows what he or she is thinking, to create a customized shopping experience.

The most beneficial new capability is applying advanced new technologies such as contextual awareness where a store system recognizes customers' location, identity, activity and time of individuals and products to generate intelligent events. This information will ensure consistency across all channels and is an approach consumers will begin to demand more frequently. Simple changes can also go a long way toward building customer appreciation. 83% of consumers say they appreciate a price checking station, and 59% find information kiosks to be helpful[12].

[12] Motorola Solutions' "Annual Holiday Shopper Survey Results," December 2011

ASSOCIATE INTELLIGENCE & TASK MANAGEMENT

Labor is a leading cost for a retailer, but shoppers indicate that store associates today are ill-equipped with the tools to provide answers. Implementing mobile technologies will allow retailers to enhance their investment in labor and enable employees to better serve customers.

WHEN EVERY STORE ASSOCIATE HAS A SMART COMMUNICATIONS DEVICE:

- Workers could easily communicate and collaborate via voice and text
- Managers would be informed and empowered
- New opportunities would arise for intelligent system-level solutions

66% **OF SHOPPERS SAY THEY BUY MORE WHEN A STORE HAS HELPFUL ASSOCIATES.**

MERCHANDISING AND INVENTORY MANAGEMENT

ENSURING THAT YOU HAVE THE RIGHT MERCHANDISE IN STOCK AND ON THE SHELVES, OR REFERENCED ONLINE, IS CRITICAL TO MAKING THE SALE.

WHEN RECENTLY ASKED, SHOPPERS INDICATED THAT THEY BELIEVED A PARTICULAR STORE WHERE THEY SHOPPED WAS OUT OF STOCK 20% OF THE TIME.

WHEN EVALUATING THE SAME DATA FOR THAT STORE, THE SYSTEMS INDICATED AN AVERAGE OF 2-3% OUT OF STOCK[13].

THE DIFFERENCE, HOWEVER, LAY IN TWO AREAS: PERCEPTION AND UNINFORMED ASSOCIATES.

When shoppers tried to find the items, they sometimes did not see them because the way they were merchandised in the store did not match the shoppers' expectations. The other instance that occurred was that shoppers sought the assistance of store associates and, with the lack of information at their fingertips, the associates came to the same often incorrect conclusion as the shoppers… they were out of stock.

Yet, today's technology can eliminate these instances. With the use of digital planogram management solutions, an associate can accurately audit a shelf or rounder to assure that it matches the intended display and quickly report any mistakes by taking a photo with a mobile device. This eliminates the potential errors that occur through paper-based planograms that contain words but no photos and that don't allow for immediate updates.

POINT OF SALE/PAYMENT

44% of retailers are refreshing their POS and checkout strategy to take advantage of new available technology options. There is a clear understanding, as over a quarter of shoppers cite checkout as a leading driver of customer dissatisfaction. In fact, most shoppers find the online payment process preferable over in-store.

To improve the process, there are two key strategies supported by a strong wireless and security infrastructure protecting shoppers' personal data that are under consideration:

1. Mix of fixed and mobile POS
2. Expanded payment options

Surveyed retailers estimate that by 2017, 23% fewer purchases will be completed at associate-staffed fixed POS terminals and instead, roughly half of all transactions will be completed via mobile point of sale (mPOS), or self checkout at a terminal or on a shopper's mobile device. Retailers are embracing mPOS pilots and trials to eliminate the high cost of traditional cash registers and accept customer payments. 55% of those surveyed even plan to incorporate the ability to take cash as part of their mPOS operations.

[13] http://bigconsumerblog.wordpress.com/2012/02/09/an-amazonian-sized-challenge-the-smartphone-and-tablet-price-check-era/

DISTRIBUTION OPERATIONS AND SUPPLY CHAIN MANAGEMENT

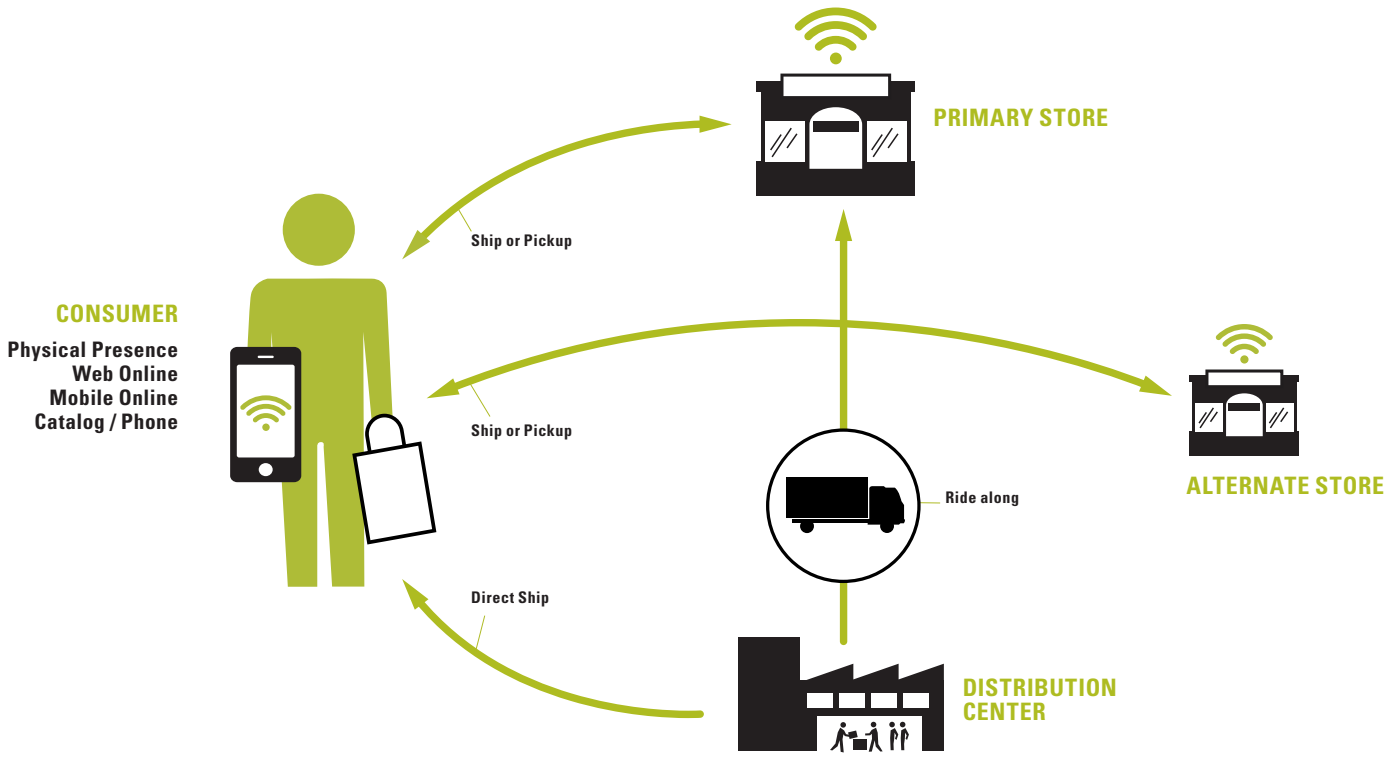
OVER THE LAST DECADE, THIS HAS BEEN THE LARGEST STRATEGIC INVESTMENT FOR BUSINESS IMPROVEMENT THROUGH EITHER INTERNAL INVESTMENT OR A MIX OF LOGISTICS BUSINESS PARTNERS.

Previously, there were only a few ways that items could be purchased and fulfilled. You either bought items in the store and carried them home with you or you purchased from a catalog or phone and had an item shipped to you. Today, the choices are countless, when you combine online, mobile, catalog and in-store purchase options with multiple shipping points and receiving areas. Add on the heightened expectations of the time it takes to complete these fulfillment methods, and many of today's retailers are finding themselves with demands that exceed their current capabilities.

Yet, the use of mobile devices, barcode scanners and RFID technology in the proper way can ensure that retailers have the two most important things at their fingertips:

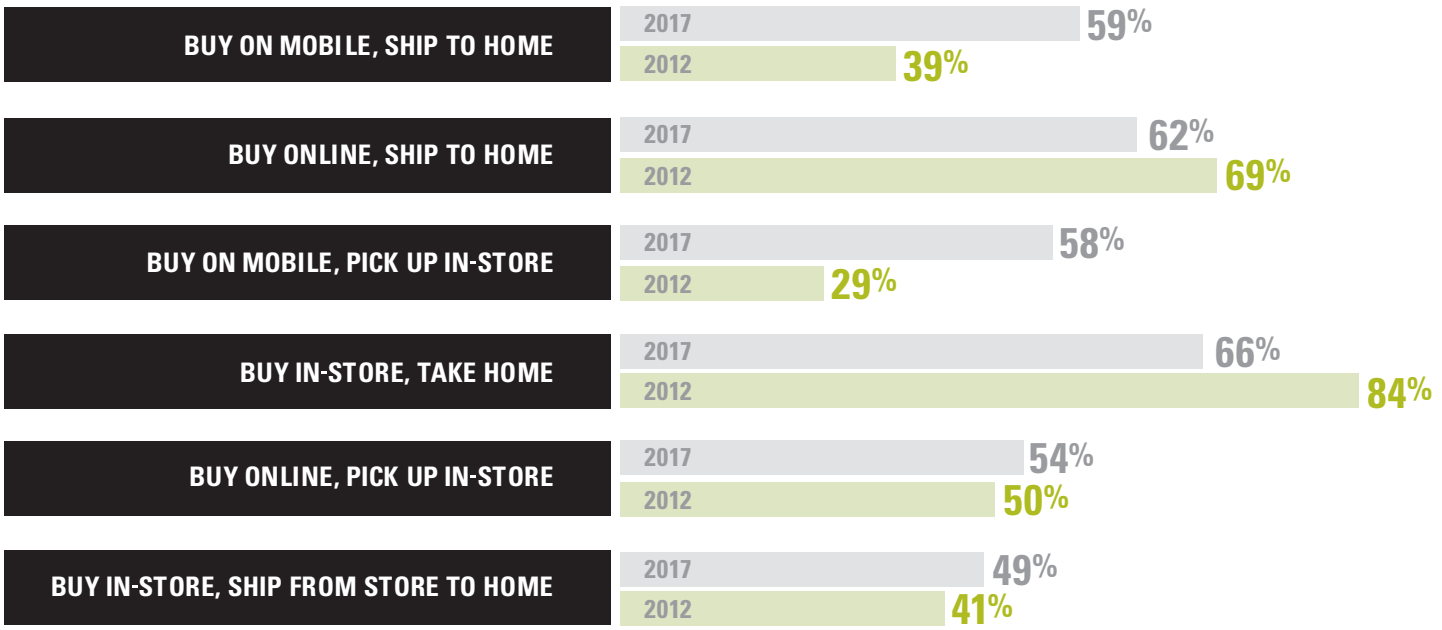
1. Accurate real-time visibility to all of the inventory throughout their entire supply chain
2. The ability to access and move the right merchandise to fulfill the order to the right place in the fastest way

MULTI-CHANNEL SCENARIOS



Retailers are recognizing the need to modify the options they provide in purchasing and fulfilling items and are taking steps to modify their operations to meet shoppers' heightened expectations.

PURCHASE AND OPTIONS



REASON FOR CHANGE

RETAIL IS A SIMPLE PART OF CONSUMERS' EVERYDAY LIVES, BUT THE RETAIL ENVIRONMENT IS HIGHLY COMPLEX.

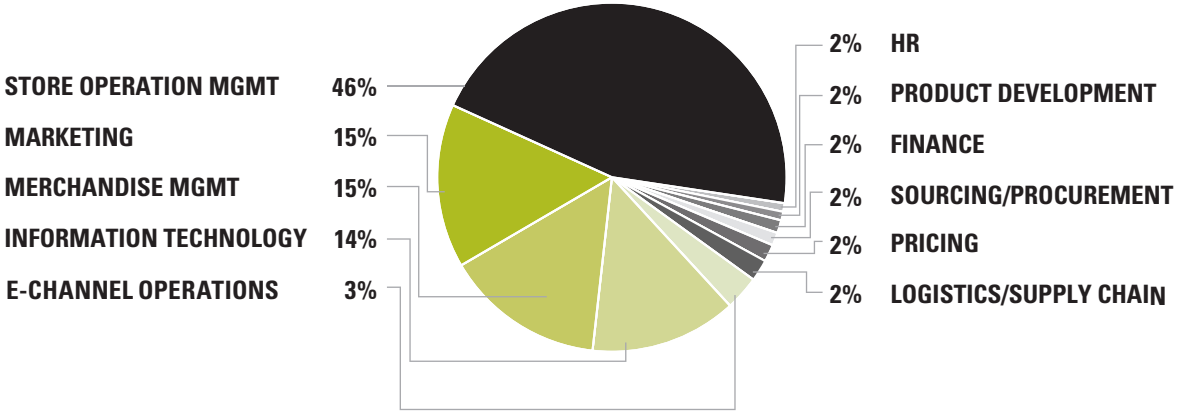
History is strewn with retailers who at one time were leaders but now are out of business. The goal of a successful retail business centers on keeping customers happy through the right product mix, service and pricing, maintaining profits and controlling labor costs.

To succeed, retailers need to embrace the challenge of relationships by leveraging technology as a means to establish and maintain an omni-channel connection with shoppers and empower their associates to be better. The retail environment of the future goes beyond the store design and takes the complexity out of converged technology, allowing multiple systems to talk to one another and exchange only the important data needed to make intelligent, real-time decisions. With reduced complexity, and applications that are simple to deploy, manage and evolve, retailers can spend more time creating experiences that connect with shoppers and keep them coming back.

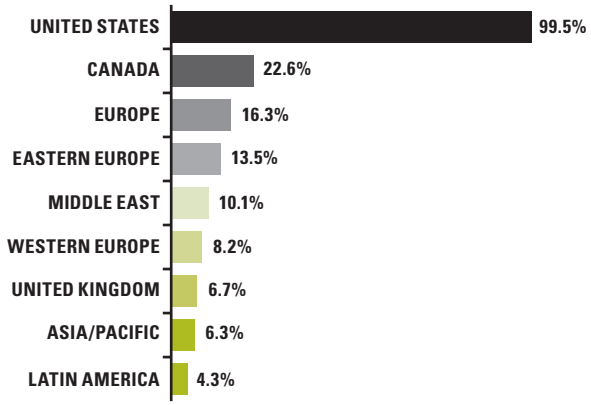
SURVEY METHODOLOGY

Motorola conducted a blind web survey through a third party to understand what impact omni-channel retail trends are having on retail, the drivers to change and retailers' plans to use mobile technology within the next five years. This survey included 250 responses from U.S.-based retail executives with a mix of retail presence that was primarily in the United States and Canada but did include other global regions. Following are the survey respondent demographics:

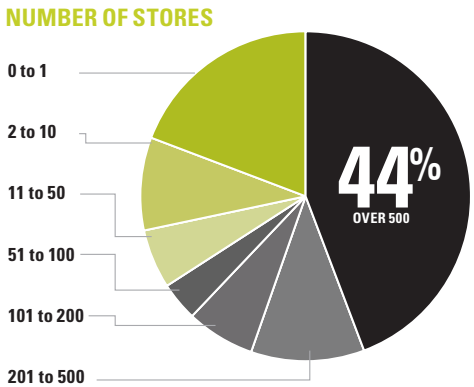
JOB FUNCTION



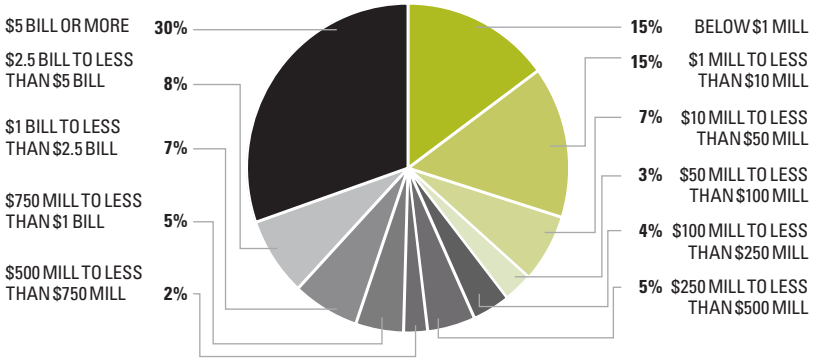
RESPONDENT LOCATIONS



SIZE OF RETAILERS



RETAILER REVENUE



MOTOROLA SOLUTIONS

MOTOROLA, MOTO, MOTOROLA SOLUTIONS and the Stylized M Logo are trademarks or registered trademarks of Motorola Trademark Holdings, LLC and are used under license. All other trademarks are the property of their respective owners. © 2012 Motorola Solutions, Inc. All rights reserved.