

How are you rolling with today's retail disruptions?

Retail faced seismic disruption in 2020. Ready or not, you and your consumers had to leap to digital. But change is nothing new for retailers. The key is how quickly you can adapt.



Changing shoppers

Consumers surge to online ordering and BOPIS



1 in 5 said they'll change where and how they shop¹



75% said they tried different stores, websites or brands during the pandemic²



57% of people are more likely to use online ordering and in-store pickup at grocery and convenience stores¹



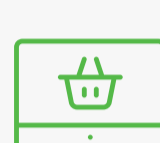
42% of American shoppers and 43% of Europeans said the COVID-19 crisis had changed their food and beverage purchasing habits



80% said they'll continue digital shopping²

Changing retail environment

An online shopping & BOPIS bump



In 2020 had more people ordering online than ever before but 85% of transactions still happen in store⁴



Buy online, pick up in-store (BOPIS) surged 259% YoY⁸ 30% of consumers prefer BOPIS over delivery⁸

A massive shift to self-checkout



75% of consumers are likely to use grocery or convenience store self-checkout¹



49% say they will "probably" or "definitely" use self-checkout more often, a 7% increase



Self-checkout technology saw a 52% growth in 2019



79% of consumers intend to continue or increase self-checkout use post-pandemic⁵

Safety drives loyalty



80% of people say they'll change how they engage with publicly available technology⁶



72% of people have worn gloves or wiped down a public surface⁶



13% of consumers switched brands with better hygiene protocols⁵



15% of people are using BOPIS more and 60% intend to continue⁵

Contactless continues



79% of consumers worldwide are using contactless payment⁷



82% of people say contactless is the cleaner way to transact⁷



Changing pace

The retail industry's sudden great leap forward



Retail invested in 3 years of digital transformation in 6 months⁹

eCommerce saw 10 years' growth in 3 months²

89% of purchasing managers bought the same or significantly more on B2B marketplaces due to COVID-19¹⁰

And 57% were spending even more on marketplace ecommerce sites, including 22% significantly more.

77% of UK businesses say COVID-19 increased their budget for digital transformation

70% of retail companies are accelerating their digital transformation.¹¹

"A holistic, technology-enabled 'reboot' could lift UK retailers' margins by 280-600 basis points.¹²"

Let's make change simple

- 1 Take a consultative approach to deployment, understanding the impacts & benefits of change
- 2 Take the initial steps with the easier, less complex aspects of store transformation
- 3 Build a successful framework and achieve the critical elements of organizational change, commitment and customer adoption
- 4 Focus on becoming future ready - having a flexible, scalable retail infrastructure that supports your vision, growth and target pace of deployment.

Retail Transformation Road Map

Grocery and convenience in a post-COVID-19 world



Curbside and in-store pickup

Direct integration of supply chain and location awareness to deliver direct to customer vehicles.



Contactless checkout

Reducing physical touchpoints in the store to protect employees and customers.

Front-facing self-service kiosks and geolocation

In-store APIs and mobile engagement

Cross-Channel Customer Experience Design

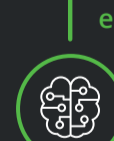
In-store mobile engagement APIs

Loyalty Program Redesign



Clicks-2-bricks strategies

Proactively communicating the strength of supply chain and localization of services in an eCommerce setting.



AI-enabled self-service

Use of customer mobile devices and scanners to reduce customer touchpoints and speed throughput.



Next-gen loyalty

Loyalty that replaces discounts and promotions for convenience and access to services.

Transform at your pace with our Next-Gen Retail Store Architecture & solutions

Software Defined Store

NCR Emerald

NCR Self-Checkout

NCR eCommerce

Digital Connected Services

Now is the time to invest—not rest.

Partner with NCR on no-regret decisions with solutions that let you partner with your pace, maximizing the investments you already have. Learn more at [NCR.com/retail](https://www.ncr.com/retail).

"Companies with resilient, future-ready business models positioned to ride these trends have pulled further away from their industry peers, while those with legacy business models have, for the most part, fallen further behind."

- McKinsey, *The Great Acceleration*

¹ NCR Consumer Survey, April 2020

² McKinsey, *The Quickening - The Quickening*, <https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/five-fifty-the-quickening>

⁴ McKinsey data, via <https://www.cnn.com/2020/09/06/how-coronavirus-convicted-grocery-chains-to-experiment-with-new-tech.html>

⁵ McKinsey, <https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/the-great-consumer-shift-tens-charts-that-show-how-us-shopping-behavior-is-changing>

⁶ Finextra 2020

⁷ Mastercard, 2020

⁸ ROI Revolution, <https://www.roirevolution.com/blog/2020/12/coronavirus-and-ecommerce/>

⁹ Zinnov, 2020

¹⁰ Digital Commerce 360, <https://www.digitalcommerce360.com/2020/11/20/amid-covid-19-b2b-buyers-turn-more-to-marketplaces/>

¹¹ Twilio, via <https://www.iot-now.com/2020/07/23/104031-covid-19-has-spurred-digital-transformation-by-5-3-years-says-study/>

¹² <https://www.mckinsey.com/-/media/mckinsey/industries/retail/our%20insights/rebooting%20retail%20how%20technology%20will%20shape%20the%20future%20of%20retail/rebooting-retail-how-technology-will-shape-the-future-of-retail.pdf>