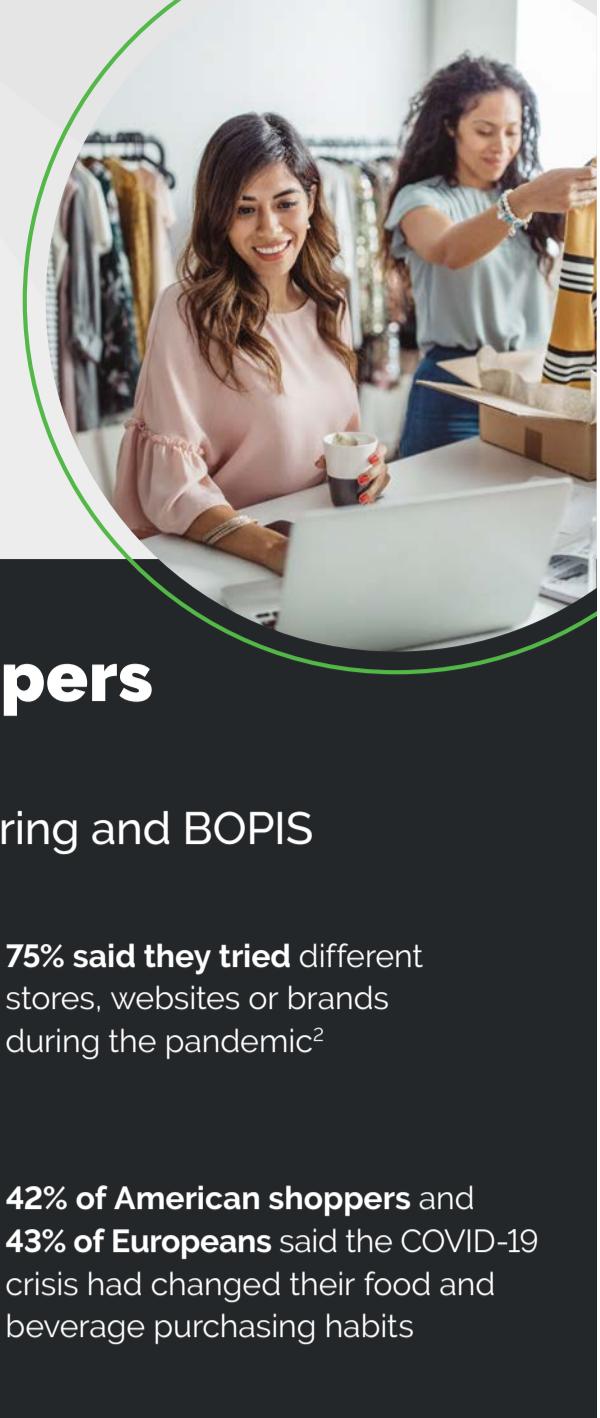


# How are you rolling with today's retail disruptions?

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.

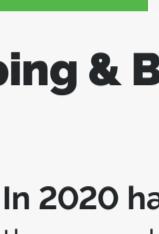


## Changing shoppers

### Consumers surge to online ordering and BOPIS



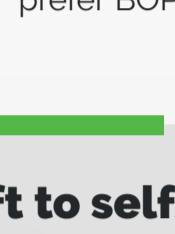
1 in 5 said they'll change where and how they shop<sup>1</sup>



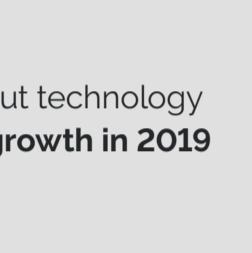
75% said they tried different stores, websites or brands during the pandemic<sup>2</sup>



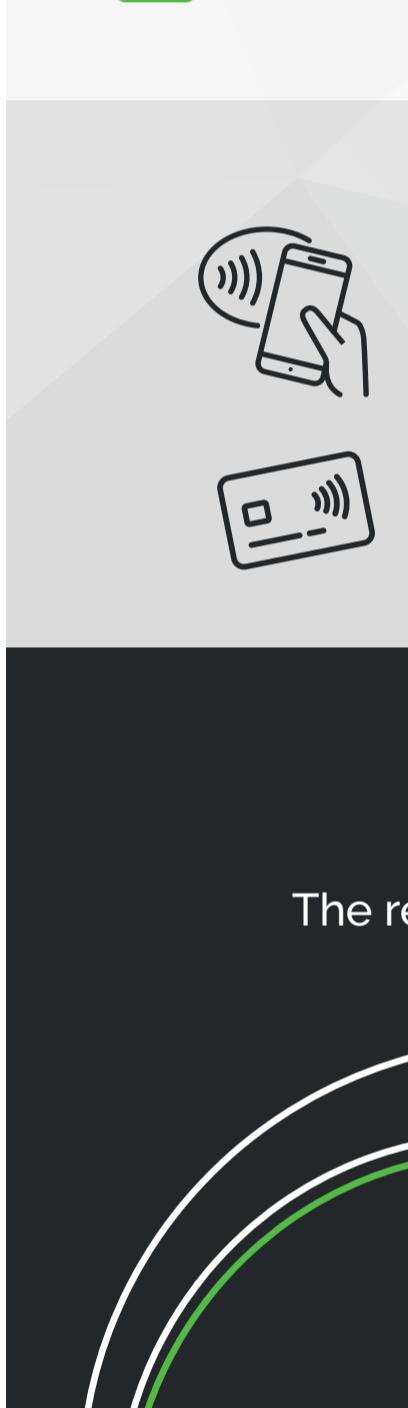
57% of people are more likely to use online ordering and in-store pickup at grocery and convenience stores<sup>3</sup>



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 shopping<sup>2</sup>



In 2020 had more people ordering online than ever before but 85% of transactions still happen in-store<sup>4</sup>

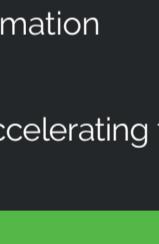


Buy online, pick up in-store (BOPIS) surged 259% YoY 30% of consumers prefer BOPIS over delivery<sup>5</sup>

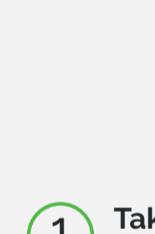
### A massive shift to self-checkout



75% of consumers are likely to use grocery or convenience store self-checkout<sup>1</sup>



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

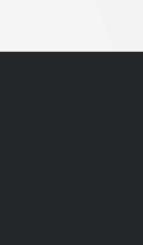


Self-checkout technology saw a 52% growth in 2019

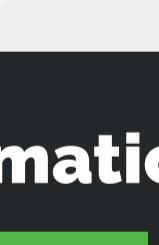


79% of consumers intend to continue or increase self-checkout use post-pandemic<sup>5</sup>

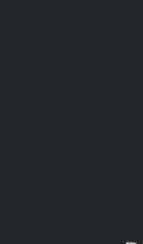
### Safety drives loyalty



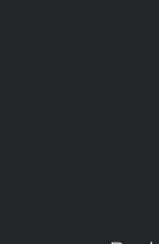
80% of people say they'll change how they engage with publicly available technology<sup>6</sup>



72% of people have worn gloves or wiped down a public surface<sup>6</sup>



13% of consumers switched brands with better hygiene protocols<sup>5</sup>



15% of people are using BOPIS more and 60% intend to continue<sup>5</sup>

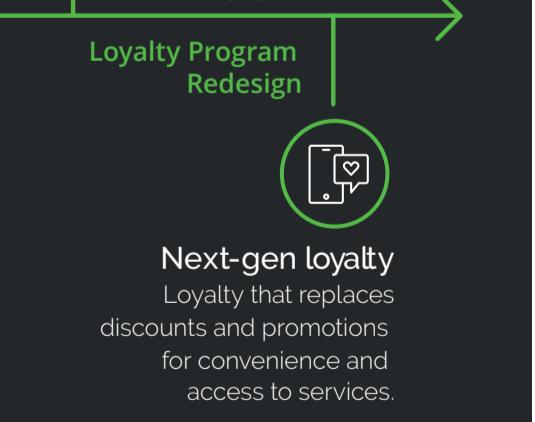
### Contactless continues



79% of consumers worldwide are using contactless payment<sup>7</sup>

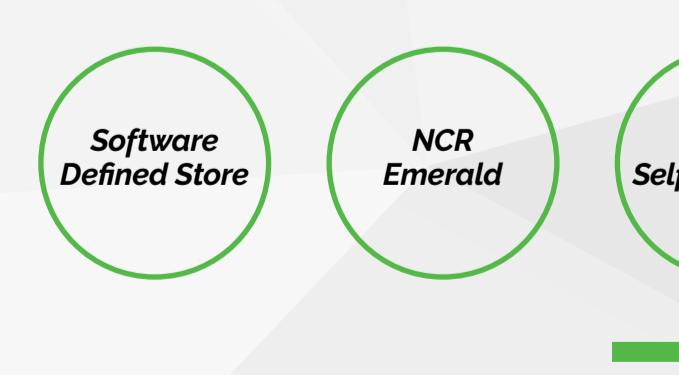


82% of people say contactless is the cleaner way to transact<sup>7</sup>



### Changing pace

#### The retail industry's sudden great leap forward



Retail invested in 3 years of digital transformation in 6 months<sup>9</sup>

eCommerce saw 10 years' growth in 3 months<sup>2</sup>

89% of purchasing managers bought the same or significantly more on B2B marketplaces due to COVID-19<sup>10</sup>

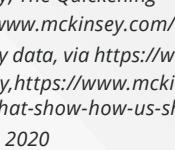
And 57% were spending even more on marketplace ecommerce sites, including 22% significantly more.

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

70% of retail companies are accelerating their digital transformation<sup>11</sup>

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

- McKinsey, The Great Acceleration



### 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 **functional 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, giving a flexible, scalable deployment.



### Retail Transformation Road Map

#### Grocery and convenience in a post-COVID-19 world



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



##### Software Defined Store

##### NCR Emerald

##### NCR Self-Checkout

##### NCR eCommerce

##### Digital Services

**"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 Quicken - The Quicken, via <https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/the-quicken-is-back-to-experimenting-with-new-tech>

3 McKinsey, via <https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/the-quicken-is-back-to-experimenting-with-new-tech>

4 McKinsey, via <https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/the-quicken-is-back-to-experimenting-with-new-tech>

<sup>5</sup>

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