2014 MOTOROLA SOLUTIONS SHOPPING STUDY
KEY FINDINGS

FEBRUARY 2014   NORTH AMERICA

7TH ANNUAL STUDY

2014 MOTOROLA SOLUTIONS SHOPPING STUDY

"Retailers have better equipped their stores and associates with technology in a meaningful way during the last six years resulting in a better shopping experience and a significant leap in in-store shopper satisfaction. By enabling more associates with technology and offering self-service shopping options, retailers are not only increasing sales but driving greater customer satisfaction."

Eduardo Conrado, Senior Vice President, Marketing & IT, Motorola Solutions

2014 MOTOROLA SOLUTIONS SHOPPING STUDY – TRENDING OBSERVATIONS

- Across the retail environment including online, mobile and in the store, **technology solutions are helping retailers** enable and improve every aspect of the shopper's experience
- Retailers' technology investments leading to **better in-store experience**: overall in-store shopper satisfaction up 23 percent since 2008
  - **Satisfaction** with checkout process and availability of store associates has **increased** 32 percent and 23 percent respectively since 2008
- Shoppers also reported a **dramatic increase in the usage of their smartphones** for shopping-related activities
  - 54 percent of all store associates still report **that shoppers are better connected** to product information than they are, but retailers are closing the gap as this figure dropped five percent from last year
  - 45 percent of shoppers reported using their mobile device for **mobile coupons**, representing a seven percent increase from last year
- Some shoppers continue to prefer self-service while others want store associate assistance and engagement
  - This includes **equipping associates with innovative technology** to answer questions and enable a faster check-out experience

METHODOLOGY AND OVERVIEW

TWO COMPLEMENTARY MARKET SURVEYS

- 1,371 North American shoppers were surveyed
- 462 North American in-store associates and managers were surveyed online throughout November
- Fielded by on-line research partner, Research Now for Motorola Solutions
- Surveys were designed to reveal experiences and attitudes towards the use of in-store technologies to enhance customer satisfaction

KEY METRICS

- Retailers' impact on shopper satisfaction (in-store, mobile and online)
- Shoppers' satisfaction and preference for technology used by in-store associates
- Shoppers' utilization of mobile technologies
- Associate pain points
- Associate views of technology

2014 MOTOROLA SOLUTIONS SHOPPING STUDY

RETAILER
(MANAGER & ASSOCIATES)
N = 462

SHOPPER
(ONLINE AND IN-STORE)
N = 1,371

Retail associates and their managers working in a wide range of store types

Shoppers represent typical shopping patterns including grocery, apparel and department stores

KEY FINDINGS
ENABLE ASSOCIATES

- 80 percent of retail associates agreed that **improving in-store communication** between staff and managers would have a significant effect on shopper satisfaction

- 52 percent of retail associates recognized the **positive effect of mobile point of sale** (mPOS) on the shopping experience

- 58 percent of shoppers believed that store associates using **handheld mobile computers enhanced** their shopping experience

- 65 percent of store associates agreed that they could **better serve customers** if they were equipped with handheld mobile computers

KEY FINDINGS
CONNECT WITH SHOPPERS

• Almost half of surveyed shoppers (47 percent) agreed that they have a **better experience** when sales associates use the **latest technologies** to assist them

• More than half of surveyed shoppers (55 percent) believed that **information kiosks** help associates **improve** the shopping **experience**

• Shoppers reported **rising dissatisfaction** with the **return/exchange process** – 29 percent were not satisfied in-store and 45 percent were not satisfied with online experiences

• Three in five (60 percent) of surveyed retail associates recognize the positive effect of **mobile loyalty account access** on the shopper experience

KEY FINDINGS
EMPOWER IT

• More than three in four associates agreed that store management can **better manage** employees and operational processes **when empowered with technology** and better information

• Retailers can **recover** 68 percent of **out-of-stock** incidents, if associates are prepared to offer shoppers the option to order the items before leaving the store and have them sent to their homes

• 56 percent of store managers agree that they **need more real-time information** to better ensure customer satisfaction

• More than half of associates indicate that their organization **does not allow personal devices** to be used for work; a third indicate there is no official BYOD policy or they are unsure

SHOPPER VIEWS
IN-STORE SATISFACTION

Q: "How satisfied are you with each of the following aspects of your in-store shopping experience(s) overall?"

Legend: ■ Very satisfied ■ Somewhat satisfied ■ In between ■ Somewhat dissatisfied ■ Very dissatisfied

Aspect	Very satisfied	Somewhat satisfied
Checkout and payment process	33.6 %	39.0 %
Returns or exchange process	33.5 %	33.6 %
Selection and availability of products (in stock)	27.0 %	42.1 %
Information provided for the customer (including pricing, availability)	26.3 %	41.7 %
Staff/sales associates availability and customer service	24.4 %	38.1 %
Overall satisfaction with shopping in stores	23.9 %	51.0 %
Availability of coupons, special offers, or discounts	21.3 %	36.0 %
Product prices	19.3 %	43.1 %

(X-axis: 0% 20% 40% 60% 80% 100%)

Customer satisfaction has been on the rise with 75% of shoppers feeling positive about shopping in stores overall. Highest dissatisfaction remains around coupons and staff/sales associate availability and customer service.
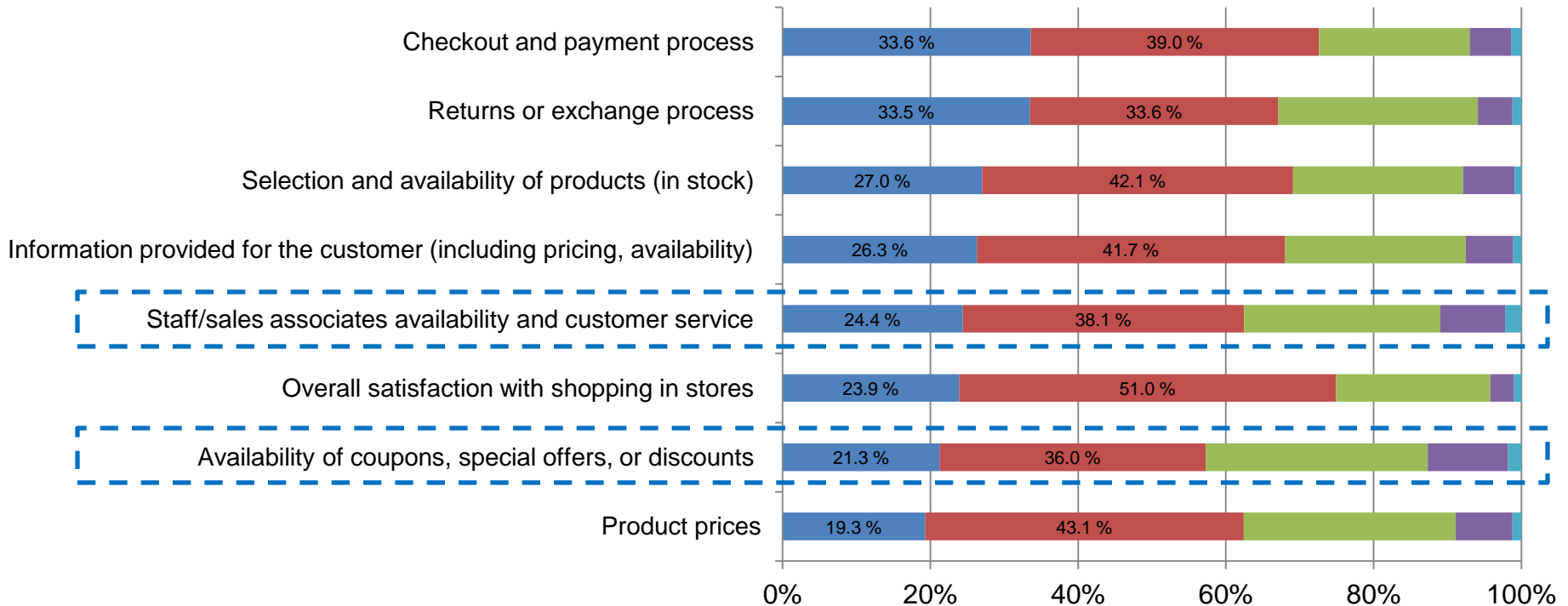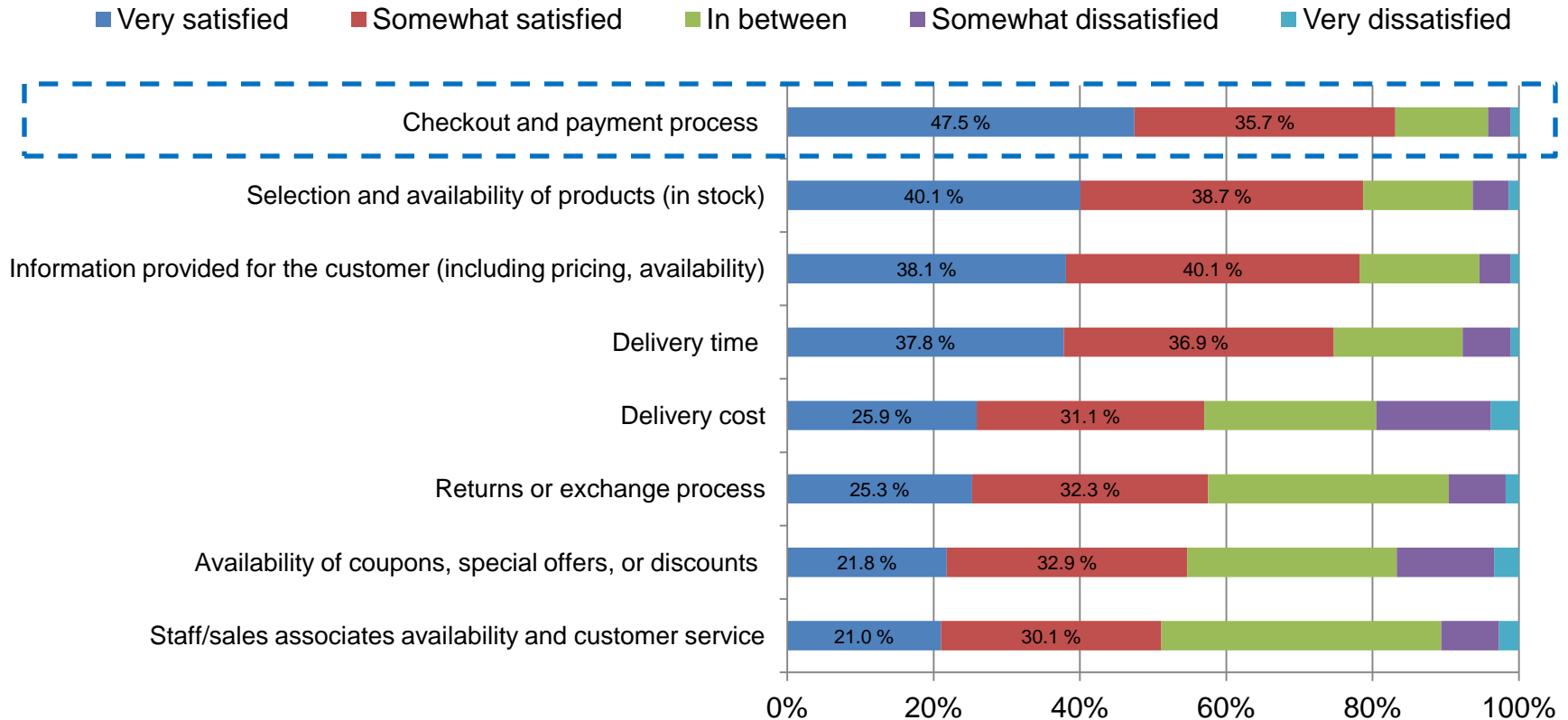
SHOPPER VIEWS
ONLINE SATISFACTION

Q: "How satisfied are you with each of the following aspects of your online shopping experience(s) overall?"

■ Very satisfied   ■ Somewhat satisfied   ■ In between   ■ Somewhat dissatisfied   ■ Very dissatisfied

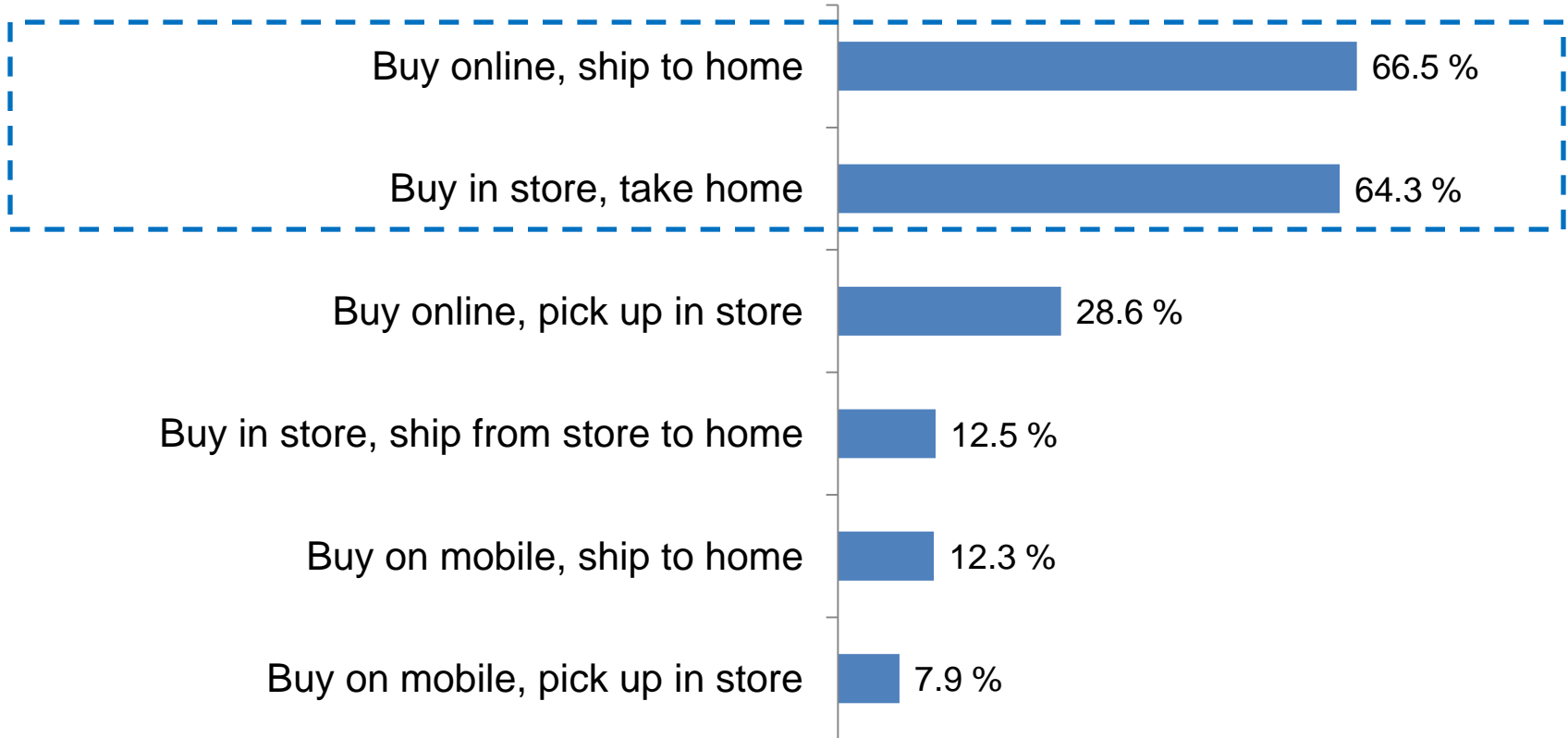| Aspect	Very satisfied	Somewhat satisfied
Checkout and payment process	47.5 %	35.7 %
Selection and availability of products (in stock)	40.1 %	38.7 %
Information provided for the customer (including pricing, availability)	38.1 %	40.1 %
Delivery time	37.8 %	36.9 %
Delivery cost	25.9 %	31.1 %
Returns or exchange process	25.3 %	32.3 %
Availability of coupons, special offers, or discounts	21.8 %	32.9 %
Staff/sales associates availability and customer service	21.0 %	30.1 %

0%   20%   40%   60%   80%   100%

Shoppers are much less satisfied with availability of coupons/discounts online than in-store; much more satisfied with ease of checkout and product selection and information.

SHOPPER VIEWS
PURCHASE PREFERENCES

Option	Percentage
Buy online, ship to home	66.5 %
Buy in store, take home	64.3 %
Buy online, pick up in store	28.6 %
Buy in store, ship from store to home	12.5 %
Buy on mobile, ship to home	12.3 %
Buy on mobile, pick up in store	7.9 %

Shoppers still prefer traditional purchase options both in-store and online, but there is definite interest for in-store pickups.

SHOPPER VIEWS
TECH PERCEPTIONS

	Gen Y	Gen X	Boomer	Pre-Boomer
Smart Carts: A video touch-screen attached to the front of a shopping cart, can be used to locate products in the store, check prices, receive promotions and coupons, and scan bar-codes on purchases	**50.2 %**	**58.7 %**	**50.5 %**	**47.3 %**
Electronic Shelf Labels: Show current product price and automatically update whenever the price is changed	**33.5 %**	**43.6 %**	**44.0 %**	**43.1 %**
Store Associate Tablets: Web-based tablet to look up product availability and product information and show store layouts	**33.9 %**	**35.1 %**	**35.1 %**	**39.0 %**
Intelligent Dressing Room: Phone and touch screen installed for shoppers to check available sizes and styles from inside the dressing room	**29.1 %**	**23.6 %**	**21.2 %**	**19.5 %**
Interactive Mirror: Allows shoppers to see their outfit from all sides and send pictures to friends; also can display detailed information about the items and related products	**17.9 %**	**7.5 %**	**10.3 %**	**9.6 %**
Self-activated Shopping Agents: Devices in the home such as refrigerators will monitor what products are used, create shopping lists, and communicate with retailers	**19.2 %**	**13.1 %**	**6.8 %**	**5.2 %**
Interactive Digital Signage: Electronic signs in the store are equipped with digital readers that recognize you based on facial recognition or by sync with mobile phone	**8.6 %**	**8.5 %**	**4.1 %**	**2.1 %**
Not at all interested in any of the above technologies	**15.3 %**	**12.8 %**	**19.6 %**	**23.9 %**

Majority of consumers are interested in different technologies to enhance the shopping experience. Older shoppers are less inclined towards technologies that are more personalized.

SHOPPER VIEWS
PRIVACY

Legend: ■ Extremely comfortable ■ Somewhat comfortable ■ Neutral ■ Not very comfortable ■ Not at all comfortable

Category	Not very comfortable	Not at all comfortable
Sharing personal information while making purchase online	25.7 %	28.5 %
Receiving text message with offer that matches what looking for and/or based on past purchases	18.2 %	36.9 %
Sharing personal information while making a purchase in-store	26.2 %	39.8 %
Websites tracking behavior	18.4 %	57.1 %
Sharing social media profile information with retailer	19.3 %	54.9 %

Shoppers are not overly comfortable sharing their personal information with retailers unless there is a possibility of receiving a special offer based on history.

SHOPPER VIEWS
PERSONALIZATION

■ Completely agree ■ Agree somewhat ■ Neither agree/disagree ■ Disagree somewhat ■ Completely disagree

I find it important that the company gives me the flexibility to control how my personal information is used to tailor my experience
- 51.4 % | 22.5 %

I appreciate brands/companies that customize messaging and offers to be relevant to me
- 12.3 % | 23.9 %

I prefer to do business with brands/companies that use information about me to make my experience more efficient from one step to the next
- 10.8 % | 16.9 %

0%   20%   40%   60%   80%   100%
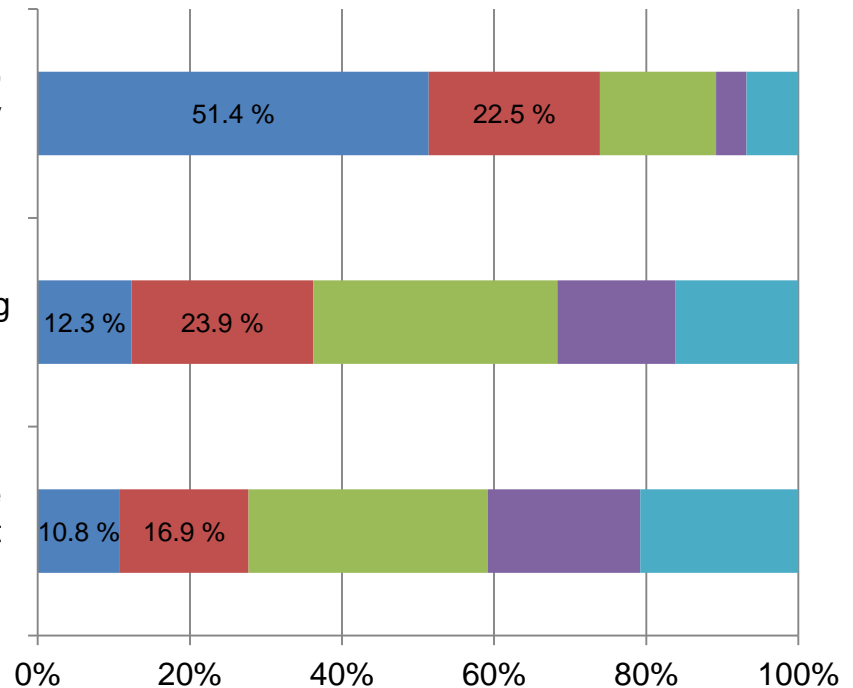
Shoppers agree that they will share their personal information, as long as the retailer gives them the flexibility to control how it is being used.

SHOPPER AND ASSOCIATE VIEWS
OUT-OF-STOCK OPPORTUNITIES

Q: **Shopper:** **"If an item you want is out-of-stock or not available when you are in the store, retailers may be able to assist you in the following ways. How likely you would be to make a purchase before you leave that store if a retail associate offered you each of these solutions while you were there?"**
Associate: **"If an item that a customer requests is out-of-stock or not available, do you usually offer any of the following solutions?"**

	What Customers Want	What Stores Offer
Offer discount to come back to the store when the item is in stock	**71.3%**	**13.6 %**
Order OOS item and have it delivered to home	**67.3 %**	**29.7%**
Find another location that has the item in stock and tell how to get there	**48.4%**	**54.1%**
Order the OOS item and have it sent to store	**42.0%**	**39.4%**
Find a substitute product within the store that is similar to the one wanted	**36.0%**	**42.4%**

Two thirds of the shoppers indicate they are likely to continue with purchase if the item is ordered and sent to their home, yet less than a third offer the option.

SHOPPER VIEWS
UPSELL OPPORTUNITY

Q: "How much more merchandise are you willing to buy with a retailer that you believe provides better customer service?"

Up to 10% more merchandise with better customer service — 22.9 %

Up to 50% more merchandise — 23.9 %

Twice as much merchandise — 14.1 %

Three times as much merchandise — 3.1 %

More than five times as much merchandise — 3.7 %

No difference; customer service doesn't increase amount I buy — 19.3 %
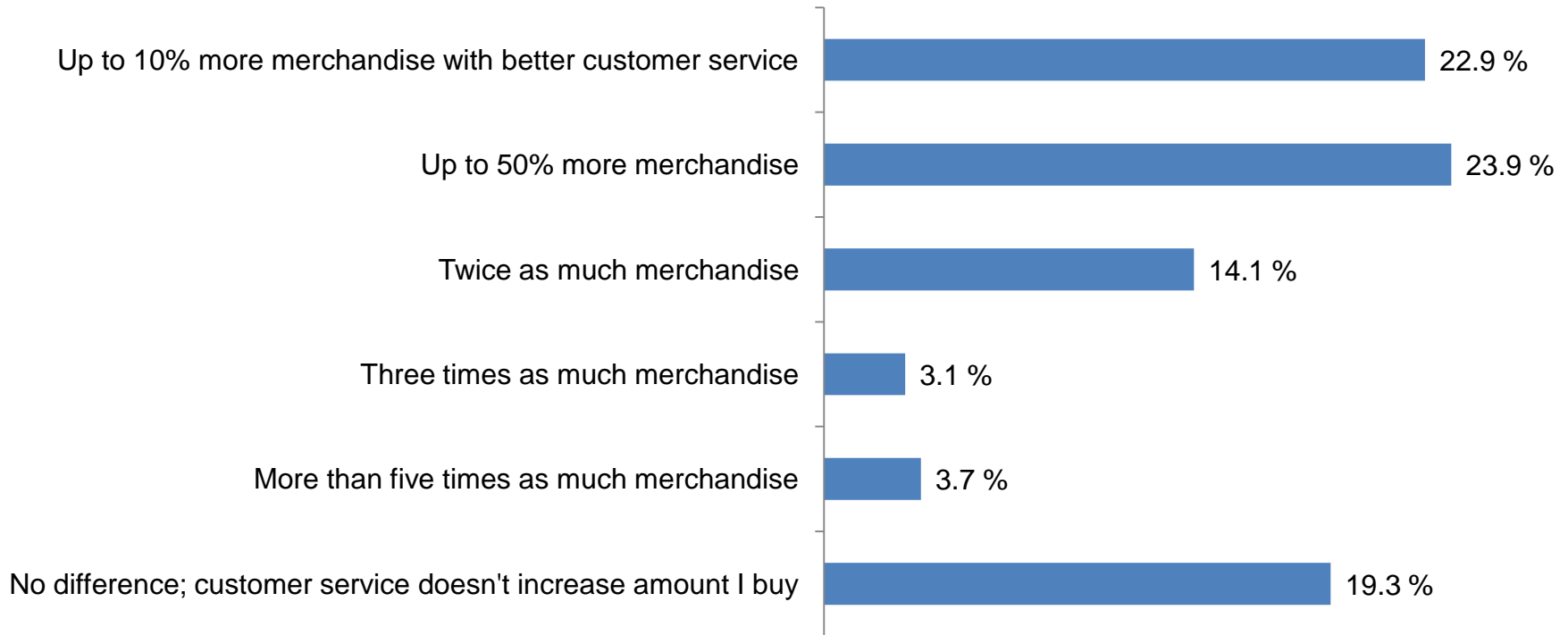
45% percent of shoppers would buy up to 50 percent more merchandise from retailers that provided better customer service.

SHOPPER VIEWS
INFLUENCE OF ASSOCIATE TECHNOLOGIES

Q: "To what extent do you agree with the following statement for each type of technology?

Store associates who use this device or technology improve my shopping experience..."

Technology	Percentage
Handheld mobile computers with scanners to read barcodes for pricing and availability	58.4%
Kiosk or stationary information terminal (for pricing and availability info)	48.5%
Mobile Point-of-Sale devices	47.5%
Tablet	43.3%
Two-way radios	42.4%
Smartphone	27.5%

■ Completely agree
■ Agree somewhat
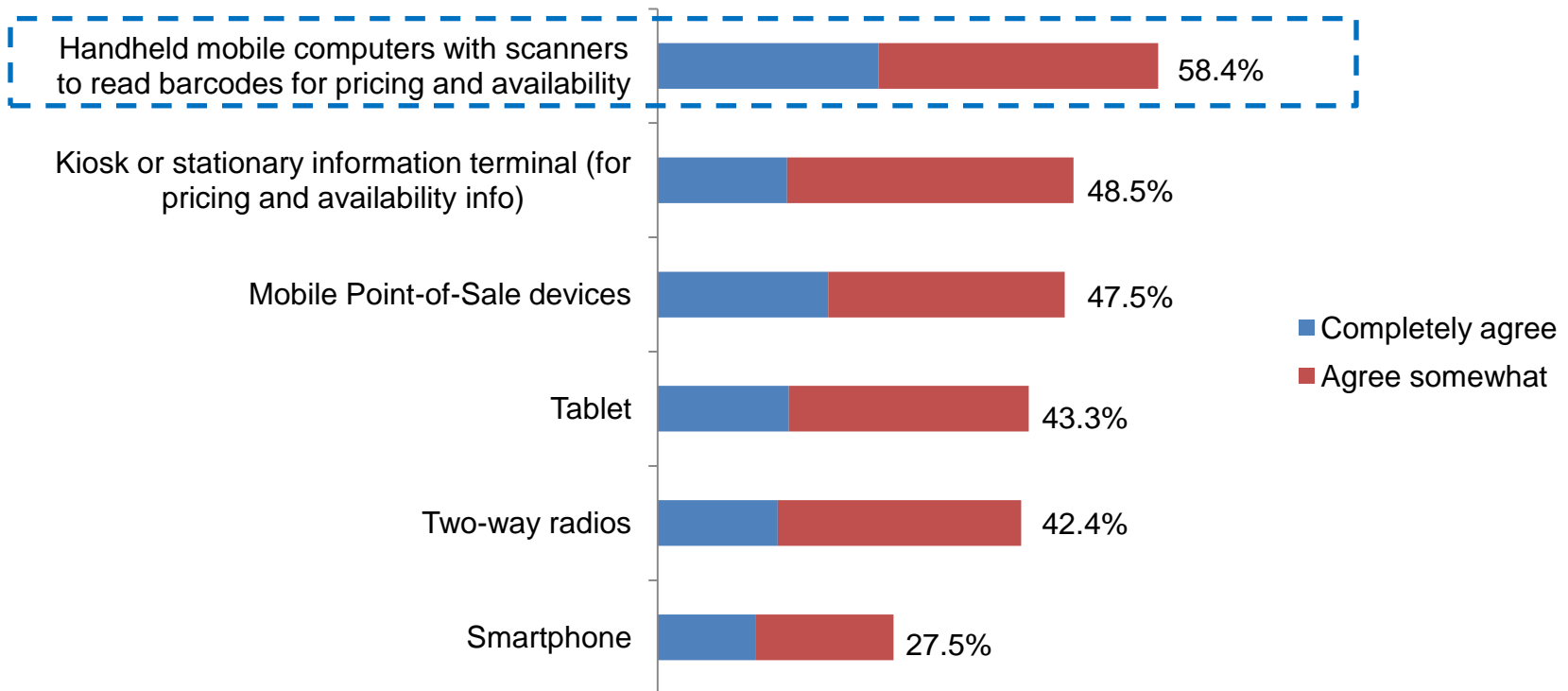
Overall, 58% of shoppers agree that store associates equipped with handheld mobile computers improve the customer experience.

SHOPPER VIEWS
INFLUENCE OF SELF-HELP TECHNOLOGIES

Q: "The technologies listed below are available in many stores to help you shop on your own, with little or no need for help from staff or a store associate. To what extent do you agree with the following statement for each type of technology?
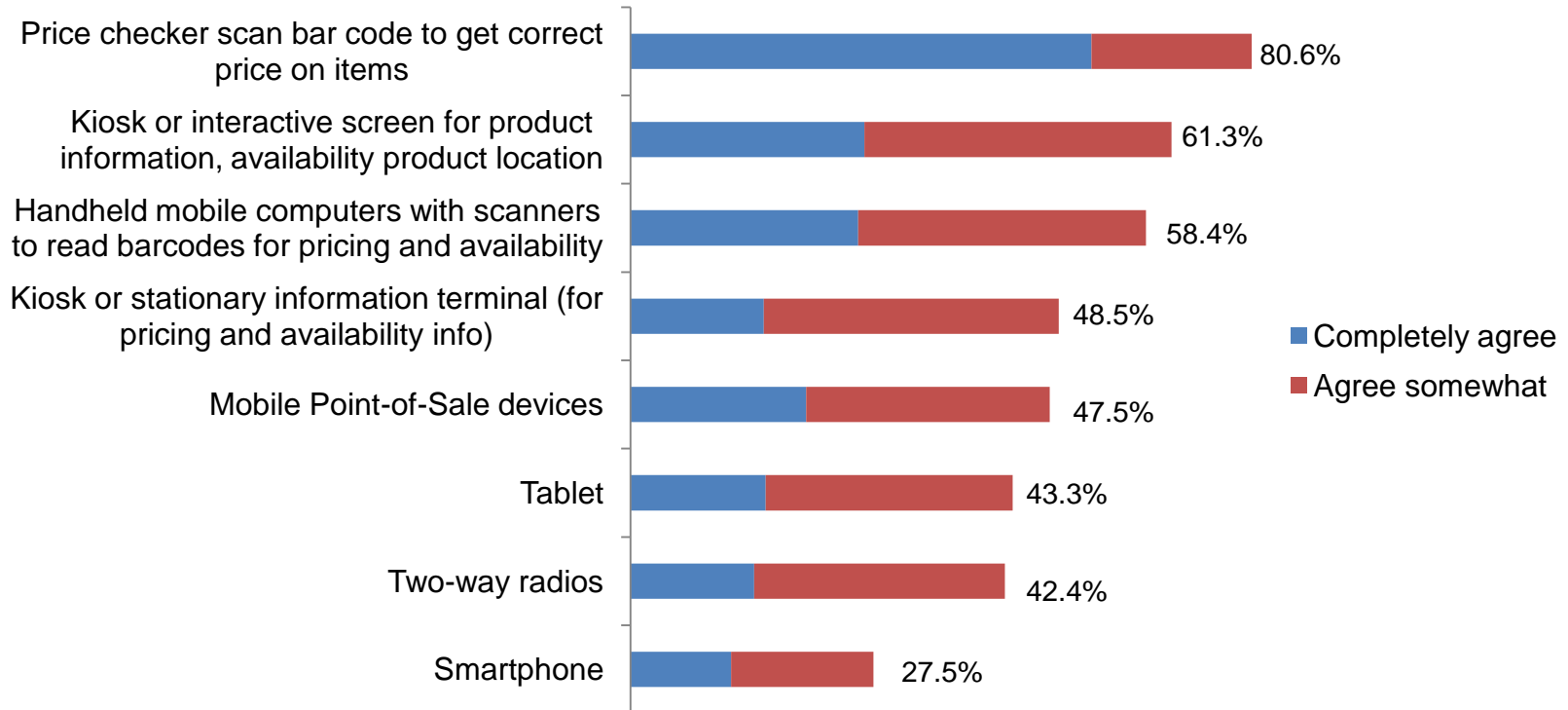
This device/technology available for me to use in the store improves my shopping experience..."

Technology	Value
Price checker scan bar code to get correct price on items	80.6%
Kiosk or interactive screen for product information, availability product location	61.3%
Handheld mobile computers with scanners to read barcodes for pricing and availability	58.4%
Kiosk or stationary information terminal (for pricing and availability info)	48.5%
Mobile Point-of-Sale devices	47.5%
Tablet	43.3%
Two-way radios	42.4%
Smartphone	27.5%

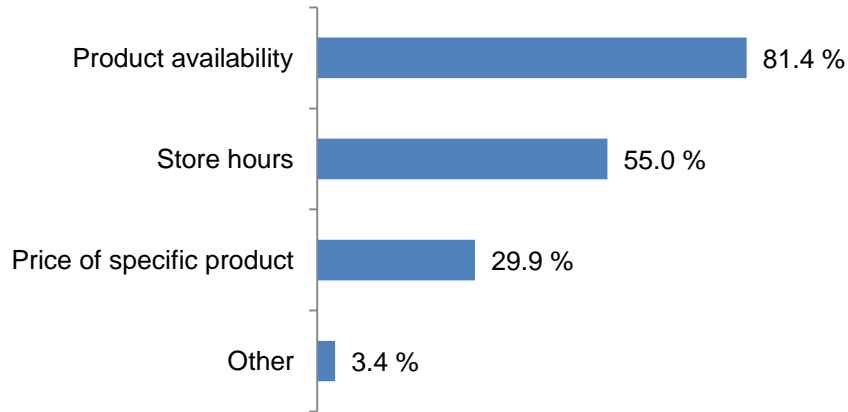Legend: ■ Completely agree   ■ Agree somewhat

Majority of shoppers agree that having self-help technologies improves their shopping experience; less than one-third (29%) of shoppers reported finding information faster on their smartphones than asking a store associate for help.
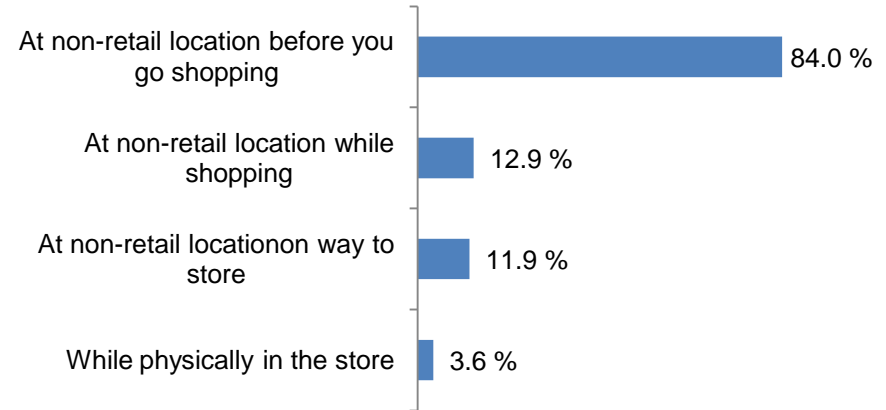
SHOPPER VIEWS
CALLING A STORE

Q: "What kind of information are you looking for when placing a call to a store?"

- Product availability — 81.4 %
- Store hours — 55.0 %
- Price of specific product — 29.9 %
- Other — 3.4 %

Q: "When do you typically call a store?"

- At non-retail location before you go shopping — 84.0 %
- At non-retail location while shopping — 12.9 %
- At non-retail location on way to store — 11.9 %
- While physically in the store — 3.6 %

Q: "How many seconds will you wait on the phone before abandoning the call?"

- Less than 30 seconds — 12.3%
- 30 seconds to 1 minute — 17.3%
- 1 to 1.5 minutes — 27.6%
- 1.5 to 2 minutes — 5.9%
- 2 to 3 minutes — 18.7%
- 3 to 4 minutes — 6.7%
- 4 minutes or more — 1.2%
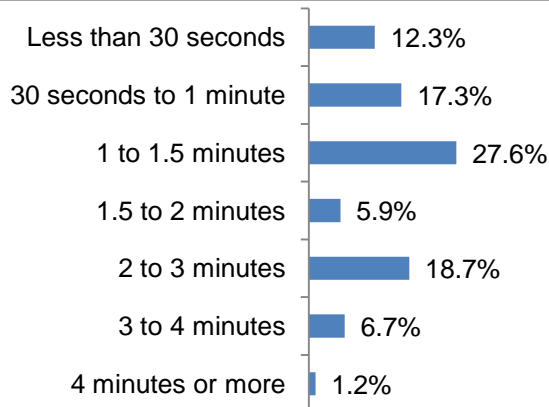
Q: "If you abandon the call without getting the information you need, which of the following actions will you typically take?"

- Will go to another store and make purchase — 43.2 %
- Will go online and place order — 28.7 %
- Will still go store called and make purchase — 26.7 %
- Other — 16.2 %
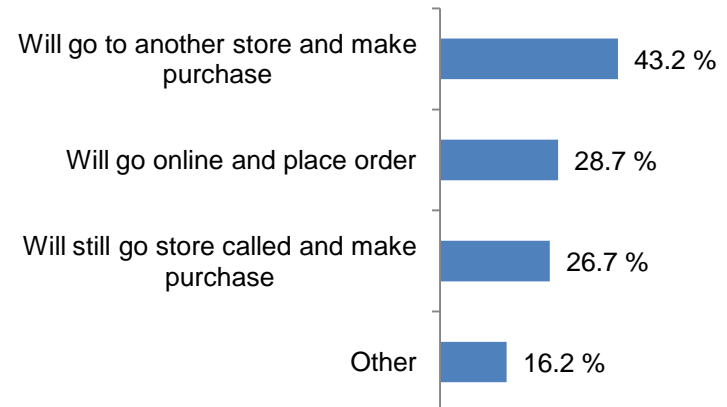
Shoppers are calling stores as part of experience, typically before leaving the home, and most often for product availability. Callers will wait an average of just under 2 minutes on hold and will go to another store if the call is abandoned.

CONNECTED SHOPPER
UTILIZATION OF SMARTPHONES

	Gen Y 18-34	Gen X 35-49	Boomer 50-64	Pre-Boomer 65+	ALL
Look up store information	79.1 %	70.1 %	63.7 %	55.1 %	68.7 %
Check for sales, specials or coupons	64.0 %	51.3 %	43.1 %	34.8 %	50.4 %
Browse an online website for products	62.1 %	58.0 %	41.7 %	26.1 %	49.8 %
Use mobile coupons	53.0 %	49.6 %	41.2 %	26.8 %	44.7 %
Look for competitive pricing	54.2 %	44.6 %	30.9 %	23.9 %	40.7 %
Check for product ratings and reviews	43.1 %	36.2 %	28.9 %	20.3 %	33.8 %
Place an order delivered to you	32.4 %	25.4 %	15.2 %	12.3 %	22.8 %
Look up loyalty account status/points	30.0 %	24.1 %	15.7 %	8.0 %	21.1 %
Check inventory prior to store visit	30.4 %	26.3 %	11.3 %	6.5 %	20.5 %
Use social media to receive reward points	20.2 %	17.0 %	8.8 %	2.9 %	13.6 %
Place an order you pick up at the store	17.8 %	15.2 %	7.4 %	5.8 %	12.5 %
Post a message or a review on social media	17.8 %	13.4 %	4.4 %	7.2 %	11.5 %
Make a payment in-store using mobile wallet/contactless payment	12.3 %	5.4 %	1.5 %	1.4 %	5.9 %

Bar values: **80.8%** (Gen Y), **73.4%** (Gen X), **55.4%** (Boomer), **35.8%** (Pre-Boomer), **59.8%** (ALL)

Bars: % of shoppers using smartphone for any of these shopping-related activities

81% of Gen Y and 73% of Gen X shoppers accessed a smartphone for shopping-related activities compared to only 55% of Boomer and 36% of pre-Boomers.

CONNECTED SHOPPER
SMARTPHONE USAGE

Activity	Percentage
Look up store information	68.7 %
Check for sales, specials or coupons	50.4 %
Browse an online website for products	49.8 %
Use mobile coupons sent as text/email message	44.7 %
Look for competitive pricing/comparison shopping	40.7 %
Check for product ratings and reviews	33.8 %
Place an order delivered to you	22.8 %
Look up your status/points in the loyalty program	21.1 %
Check inventory of a product of interest prior to store visit	20.5 %
Check into a social media site or group to receive…	13.6 %
Place an order you pick up at the store	12.5 %
Post a message or a review of a product or store…	11.5 %
Mobile wallet/contactless payment	5.9 %

Six in ten (61%) respondents use smartphones….majority of these users (85%) use their phones for shopping-related activities.

CONNECTED SHOPPER
RETAIL APP USAGE

Q: "Have you downloaded any shopping-related apps to your smartphone? Using a 5 point scale where 5 means extremely easy and 1 means not at all easy, how easy has it been for you to use your smartphone in a retail location for each of these activities"

Shoppers have used any of the following apps…

Application	Percentage
Coupon application	77.2 %
Price comparison application	65.8 %
Shopping list/menus/recipes	63.7 %
Mobile loyalty application	63.4 %
GPS location application	62.3 %
Product availability application	61.3 %
Specialized retail store application	57.8 %
Self-checkout application	42.7 %
Group shopping	39.5 %
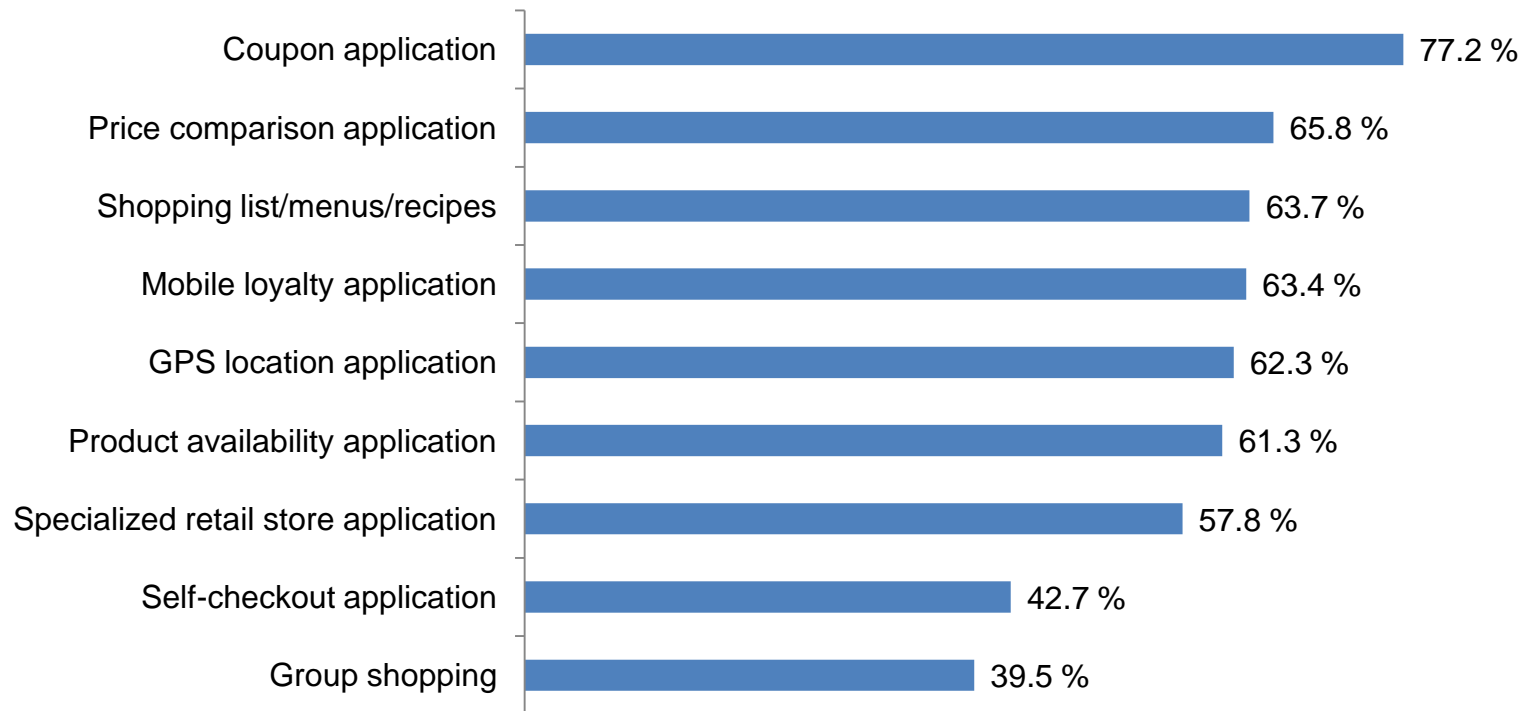
Nearly half (46%) respondents have downloaded shopping related apps to their smartphones; just a third (35%) find it easy to use a smartphone in retail locations.

CONNECTED SHOPPER
TECH PERCEPTIONS

Q: "To what extent do you agree with each of the following statements about how technology influences your shopping experience?"

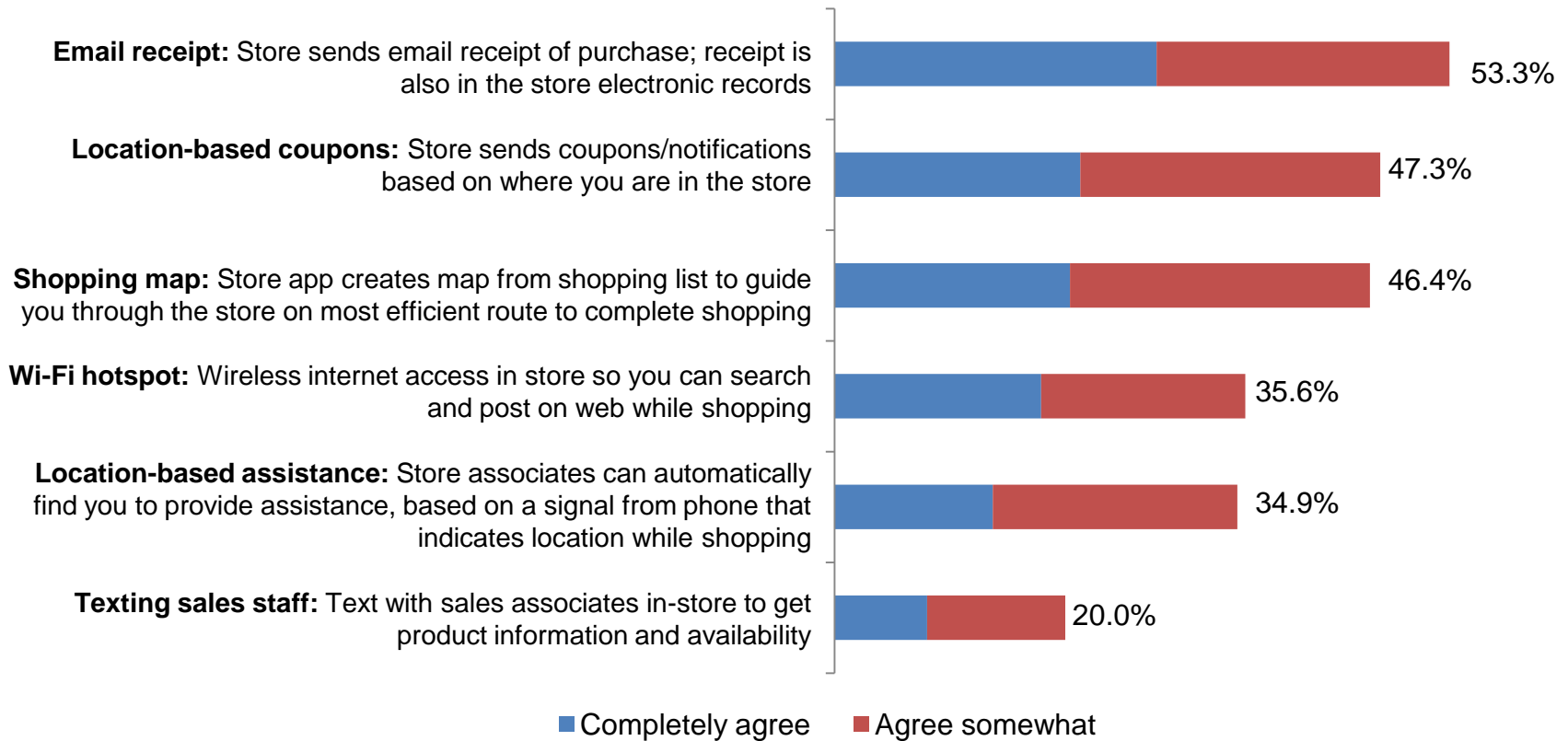|	Gen Y	Gen X	Boomer	Pre-Boomer	Total
"I have a better experience in stores where the sales associates use the latest technology to assist customers"	47.6%	49.2%	47.8%	46.2%	47.6%
"The self-help kiosks in the store are more helpful than using my smartphone"	35.5%	40.0%	36.4%	35.0%	36.6%
"I am better connected to product information than store associates"	42.8%	40.6%	30.7%	17.1%	31.9%
"The self-help kiosks in the store are more helpful than store associates"	34.2%	36.7%	28.0%	18.7%	28.8%
"I can find information myself faster on my smartphone than asking a store associate for help"	45.7%	37.8%	23.4%	14.6%	29.2%

Strongest agreement was cited for better experience with store associates using latest technology, across all age groups. Comfort with smartphones drops off for Boomer segment.

CONNECTED SHOPPER
LIKELIHOOD TO USE SERVICES

Q: "How likely would you be to use the following in-store services if retailers offered them for shoppers to use on their own smartphones while shopping in the store?"

Email receipt: Store sends email receipt of purchase; receipt is also in the store electronic records — 53.3%

Location-based coupons: Store sends coupons/notifications based on where you are in the store — 47.3%

Shopping map: Store app creates map from shopping list to guide you through the store on most efficient route to complete shopping — 46.4%

Wi-Fi hotspot: Wireless internet access in store so you can search and post on web while shopping — 35.6%

Location-based assistance: Store associates can automatically find you to provide assistance, based on a signal from phone that indicates location while shopping — 34.9%

Texting sales staff: Text with sales associates in-store to get product information and availability — 20.0%
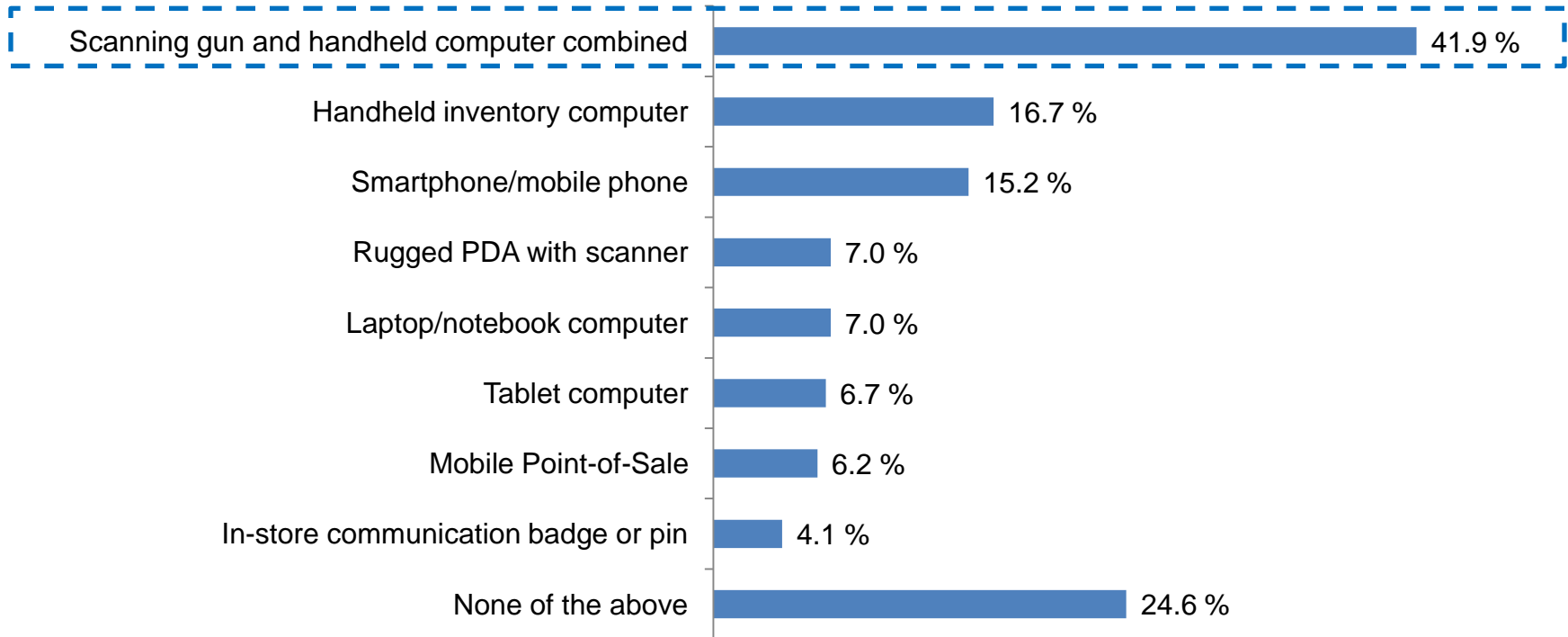
■ Completely agree   ■ Agree somewhat

Many shoppers are interested in in-store services that can offer them electronic receipts, discounts and assistance in creating efficient shopping experiences.

ASSOCIATE VIEWS
WIRELESS DEVICE USAGE

Q: "Which of the following wireless device(s) do you use to connect in-store, wireless mode? (Wireless mode is used to send and receive information over the store's wireless network.)"

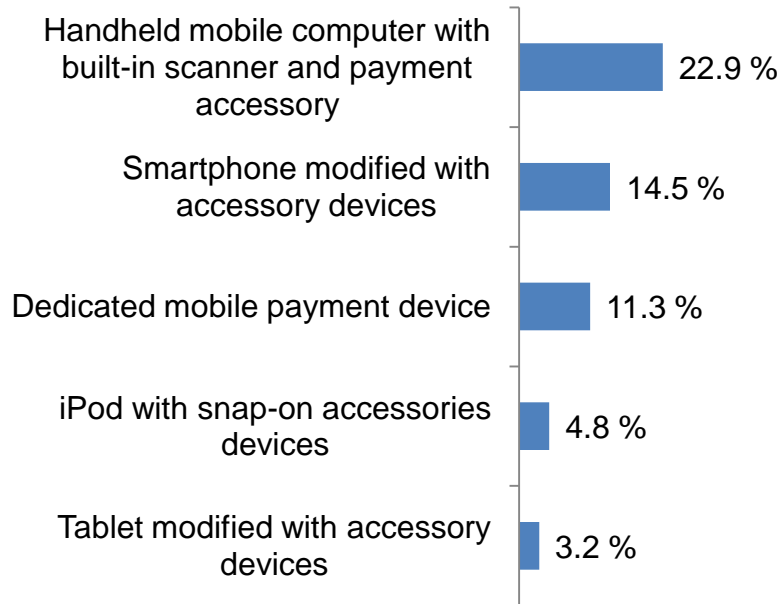| Device	Percentage
Scanning gun and handheld computer combined	41.9 %
Handheld inventory computer	16.7 %
Smartphone/mobile phone	15.2 %
Rugged PDA with scanner	7.0 %
Laptop/notebook computer	7.0 %
Tablet computer	6.7 %
Mobile Point-of-Sale	6.2 %
In-store communication badge or pin	4.1 %
None of the above	24.6 %

Three quarters of associates are using some sort of technology/device on the job. The majority are using some sort of handheld device.

ASSOCIATE VIEWS
MOBILE POS DEVICES

Q: "Which of the following best describes the mobile point-of-sale device that you are using?"

Handheld mobile computer with built-in scanner and payment accessory — 22.9 %

Smartphone modified with accessory devices — 14.5 %

Dedicated mobile payment device — 11.3 %

iPod with snap-on accessories devices — 4.8 %

Tablet modified with accessory devices — 3.2 %

Q: "What accessories are you using with the mobile point-of-sale device?"

Barcode scanner (snap-on or sled) — 49.8 %

Printer (snap-on unit or blue-tooth separate device) — 19.7 %

Signature capture pad (snap-on or sled) — 14.7 %

Rugged skin or snap-on protective case — 10.0 %
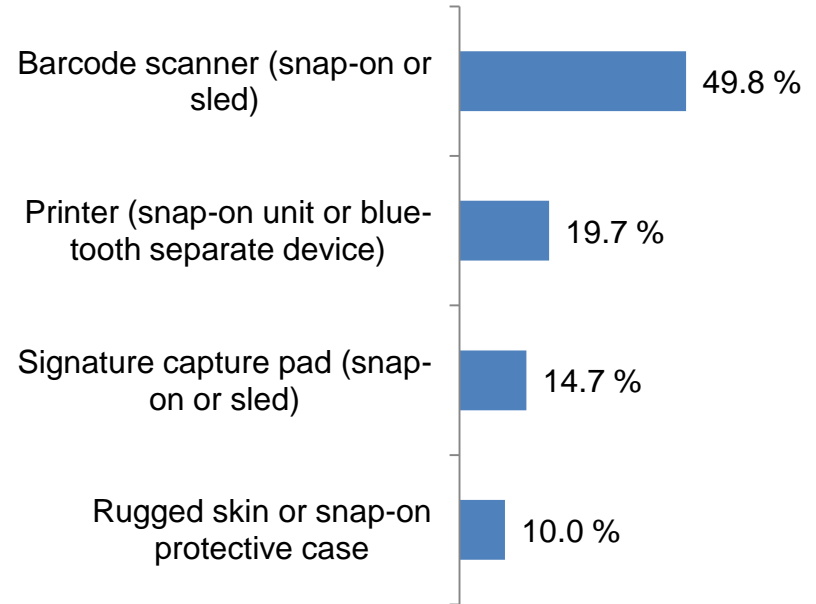
A small percentage of associates are engaged with MobilePOS. For those using MPOS, the usage is spread out among dedicated devices and other devices with accessories.

ASSOCIATE VIEWS
"BYOD" POLICY

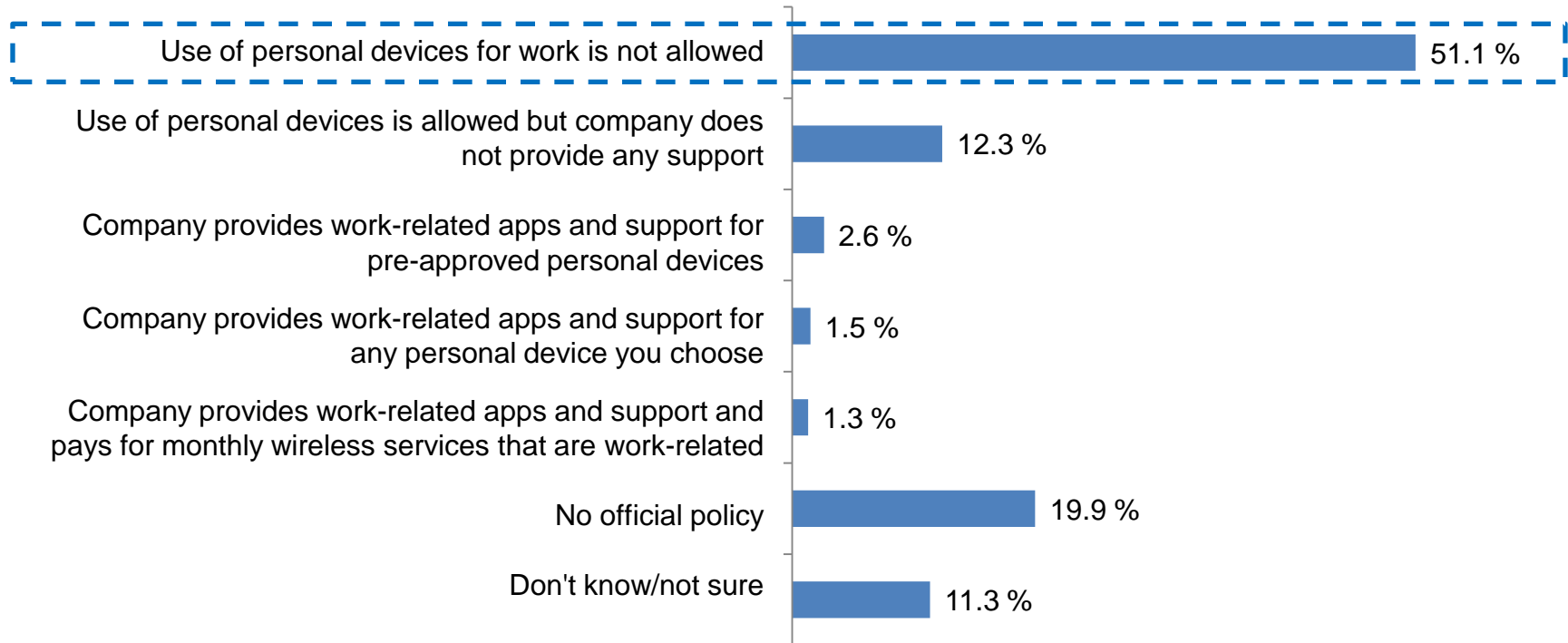**Q: "Which of the following best describes your company's policy for supporting personally-owned smartphones and tablets for work-related purposes?"**

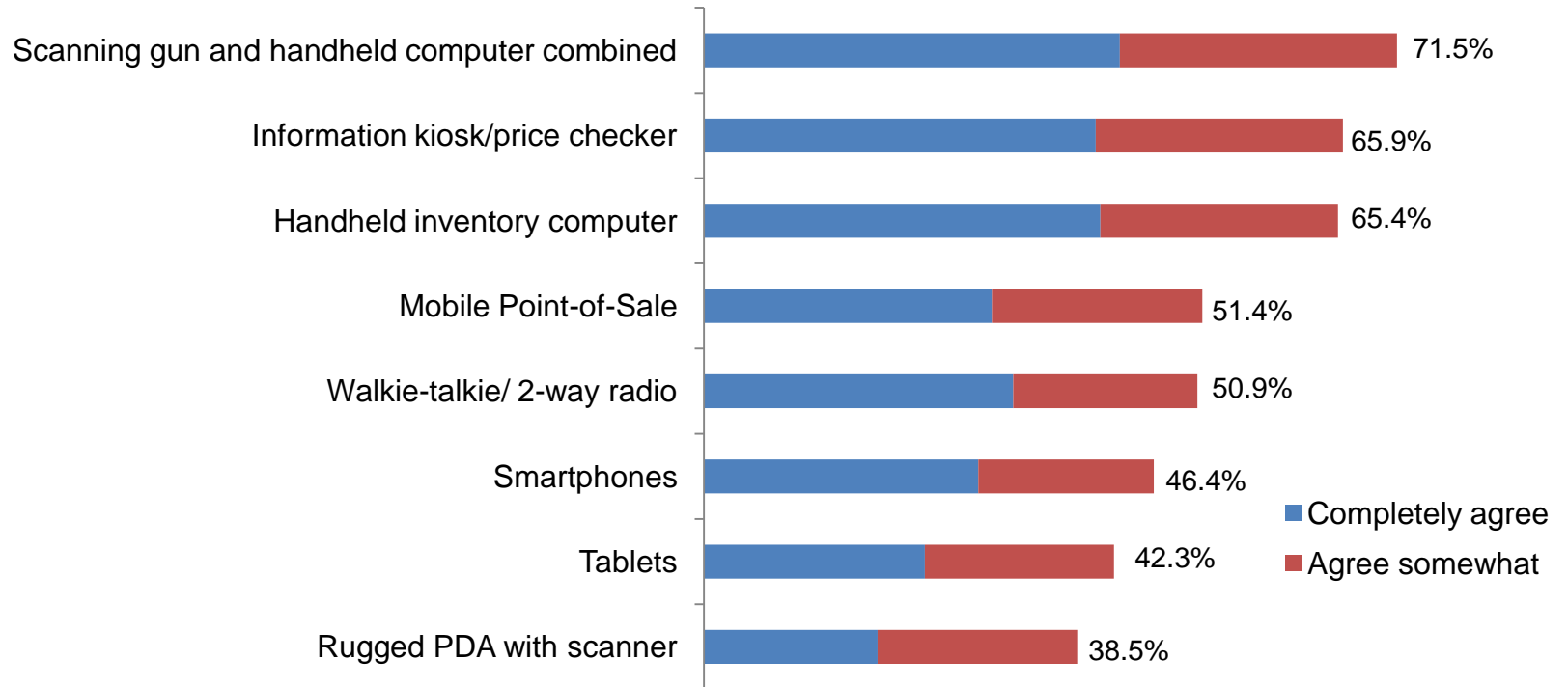| Category	Percentage
Use of personal devices for work is not allowed	51.1 %
Use of personal devices is allowed but company does not provide any support	12.3 %
Company provides work-related apps and support for pre-approved personal devices	2.6 %
Company provides work-related apps and support for any personal device you choose	1.5 %
Company provides work-related apps and support and pays for monthly wireless services that are work-related	1.3 %
No official policy	19.9 %
Don't know/not sure	11.3 %

More than half of associates indicate that their organization does not allow personal devices to be used for work; a third indicate there is no official policy or they are unsure.

ASSOCIATE VIEWS
TECHNOLOGY AND CUSTOMER EXPERIENCE

Q: "To what extent do you agree with the following statement for each type of technology?
I can provide a better customer experience by using this technology..."

Technology	Percentage
Scanning gun and handheld computer combined	71.5%
Information kiosk/price checker	65.9%
Handheld inventory computer	65.4%
Mobile Point-of-Sale	51.4%
Walkie-talkie/ 2-way radio	50.9%
Smartphones	46.4%
Tablets	42.3%
Rugged PDA with scanner	38.5%

Legend:
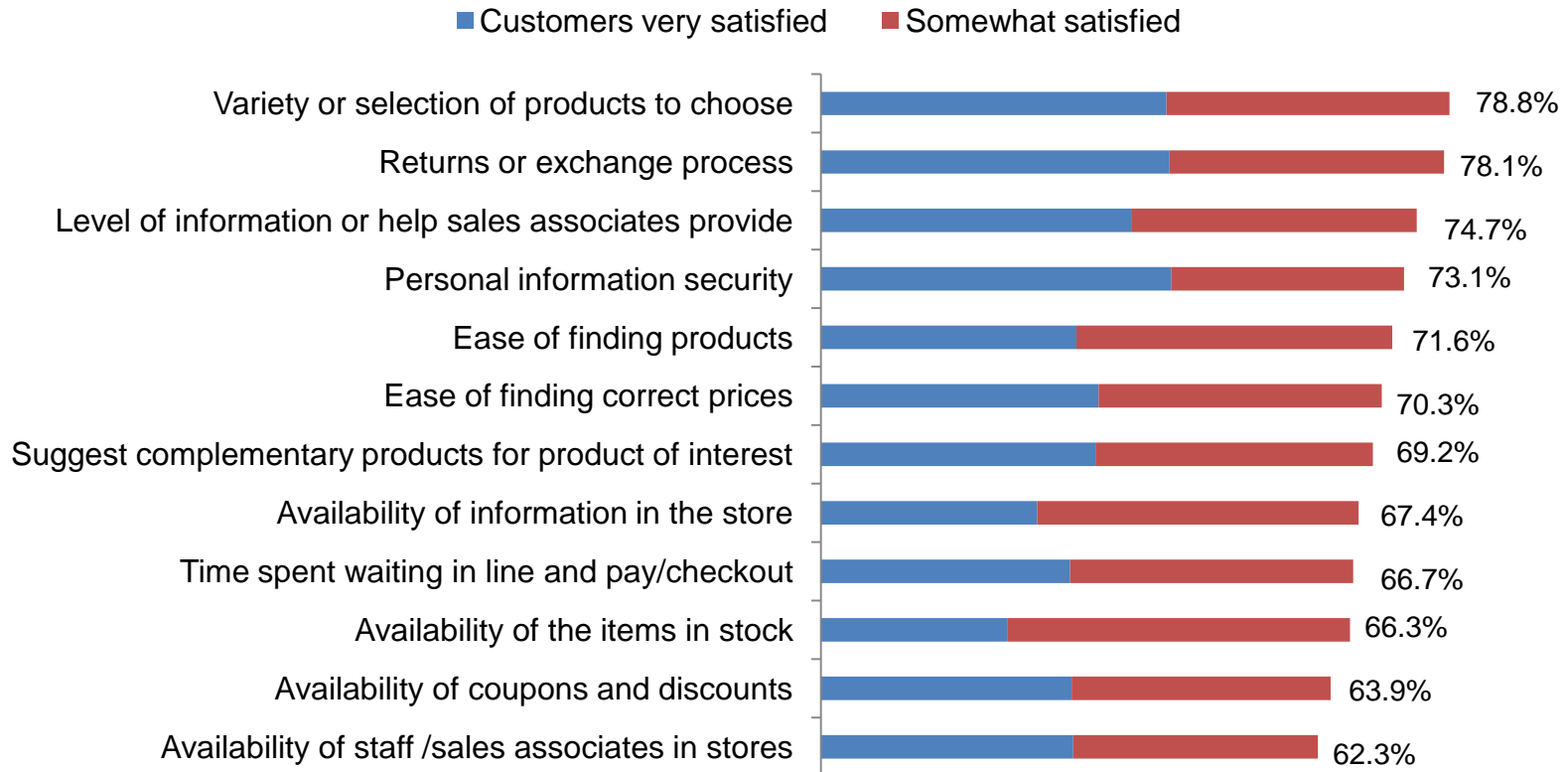- ■ Completely agree
- ■ Agree somewhat

Associates do believe that having technologies, particularly handheld computers equipped with scanners and information kiosks, enable them to provide better customer experiences.

ASSOCIATE VIEWS
STORE SATISFACTION

Q: "How well do you think your store satisfies customers on each of the following measurements?"

■ Customers very satisfied   ■ Somewhat satisfied

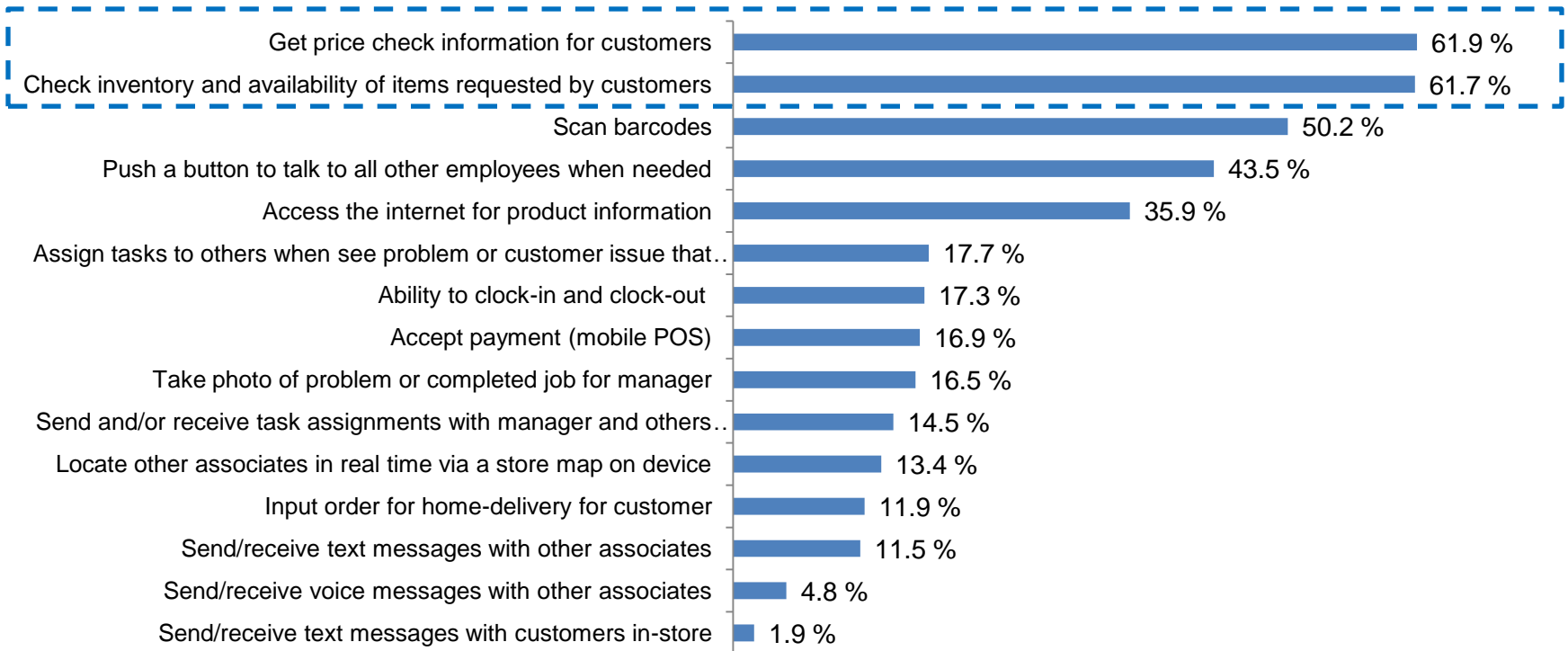| Measurement	Percentage
Variety or selection of products to choose	78.8%
Returns or exchange process	78.1%
Level of information or help sales associates provide	74.7%
Personal information security	73.1%
Ease of finding products	71.6%
Ease of finding correct prices	70.3%
Suggest complementary products for product of interest	69.2%
Availability of information in the store	67.4%
Time spent waiting in line and pay/checkout	66.7%
Availability of the items in stock	66.3%
Availability of coupons and discounts	63.9%
Availability of staff /sales associates in stores	62.3%

Associates believe customers are highly satisfied with the components of the shopping experience; lowest perceived satisfaction revolves around availability of sales staff, discounts and out of stocks.

ASSOCIATE VIEWS
USEFUL CAPABILITIES

Q: "Assuming that you and all your associates were equipped with a mobile device to use during your shift, what capabilities would be most helpful to you?"

Capability	Percentage
Get price check information for customers	61.9 %
Check inventory and availability of items requested by customers	61.7 %
Scan barcodes	50.2 %
Push a button to talk to all other employees when needed	43.5 %
Access the internet for product information	35.9 %
Assign tasks to others when see problem or customer issue that…	17.7 %
Ability to clock-in and clock-out	17.3 %
Accept payment (mobile POS)	16.9 %
Take photo of problem or completed job for manager	16.5 %
Send and/or receive task assignments with manager and others…	14.5 %
Locate other associates in real time via a store map on device	13.4 %
Input order for home-delivery for customer	11.9 %
Send/receive text messages with other associates	11.5 %
Send/receive voice messages with other associates	4.8 %
Send/receive text messages with customers in-store	1.9 %

Associates are most interested in the ability to check prices and product availability for customers.

ASSOCIATE VIEWS
TECH PERCEPTIONS

% who see significant or somewhat positive impact	
Store Associate Tablets: Web-based tablet to look up product availability and product information and show store layouts	**61%**
Loyalty Account Access via Mobile Phone: Shoppers can receive text messages about coupon and relevant product information directly to their mobile phone when they pay for their purchases	**60%**
Electronic Shelf Labels: Show current product price and automatically update whenever the price is changed	**57%**
Comparison Shopping via Mobile Phone: Shoppers comparison shop and research real-time pricing and product information using their mobile phone while they are in the store	**52%**
Smart Carts: A video touch-screen attached to the front of a shopping cart, can be used to locate products in the store, check prices, receive promotions and coupons, and scan bar-codes on purchases	**51%**
Self-activated Shopping Agents: Devices in the home such as refrigerators will monitor what products are used, create shopping lists, and communicate with retailers	**37%**
Intelligent Dressing Room: Phone and touch screen installed for shoppers to check available sizes and styles from inside the dressing room	**32%**
Interactive Mirror: Allows shoppers to see their outfit from all sides and send pictures to friends; also can display detailed information about the items and related products	**29%**

Associates see positive impact from technologies/capabilities widely available today, such as tablets, loyalty program access and comparison shopping with mobile phones, and electronic shelf labels.

ASSOCIATE VIEWS
PERCEPTIONS ON SHOPPER BEHAVIOR

Q: "What do you think of each of the following statements about technology and the shopper's experience?"

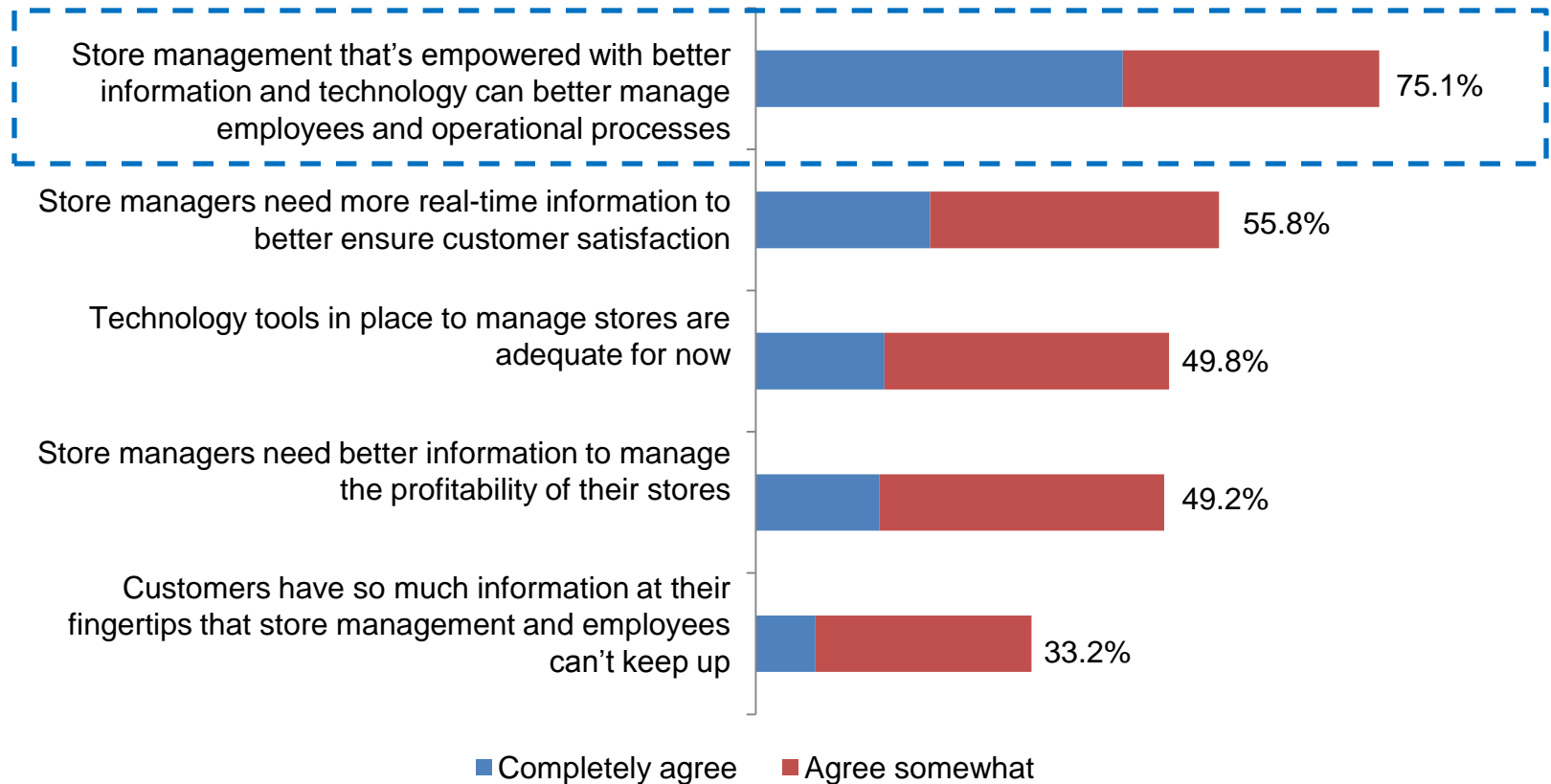| % who completely agree or agree somewhat	Sales Staff	Managers
"Shoppers can easily find a better deal so customer service is more important than ever"	79.8 %	84.6 %
"Improving in-store communication between staff and managers would have a significant effect on customer satisfaction"	75.8 %	84.6 %
"Store associates equipped with tablets would be able to serve customers better"	52.6%	60.8%
"The shopper today is better connected to product information than store associates"	50.9 %	59.7 %

Retailers recognize that shoppers are better connected. Improving in-store communication is a factor in customer satisfaction for 79% of retail staff and managers .

MANAGER VIEWS
TECHNOLOGY IMPRESSIONS

Q: "To what extent do you agree/disagree with each of the following statements about in-store technology?"

Store management that's empowered with better information and technology can better manage employees and operational processes — **75.1%**

Store managers need more real-time information to better ensure customer satisfaction — **55.8%**

Technology tools in place to manage stores are adequate for now — **49.8%**

Store managers need better information to manage the profitability of their stores — **49.2%**

Customers have so much information at their fingertips that store management and employees can't keep up — **33.2%**

■ Completely agree   ■ Agree somewhat

Managers strongly agree that empowering employees with better information and technology will improve the store's processes.
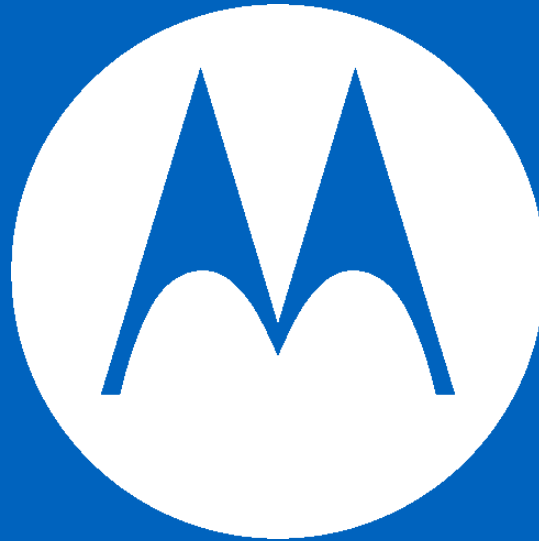
For more information, please visit:
motorolasolutions.com/retail

Or contact:
Michelle Marian, Retail & Hospitality Lead
michelle.marian@motorolasolutions.com