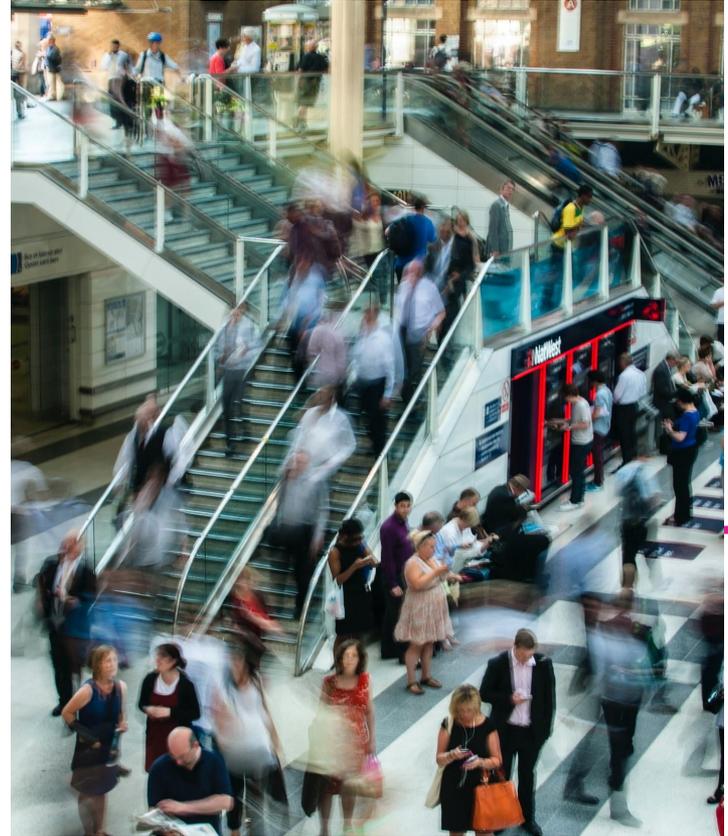


# Retail Sales Execution Report



coyle



## Introduction

In a year rocked by an international pandemic, the retail industry was forced to quickly adapt new ways to meet customers' needs while adhering to health and safety guidelines.

Our study reveals that by the holidays, the vast majority of retailers were able to meet expectations around health and safety but, likely as a result, fell down in other areas. In fact, only 24% of retailers created an environment that felt “festive” this holiday season..

But there are clear indicators that retailers can still flourish in this challenging environment. The secret lies in employee engagement and effective store communication.



## About Retail Zipline

Retail Zipline is the operations platform that powers retail's most complex work. Zipline is the only solution on the market that combines store communications and task management to drive flawless store execution. Built by retail for retail, Zipline understands the unique pressures stores are facing today and ensures that everyone in the field has the information, context and tools needed to be successful in their roles. By aligning the fleet, Zipline enables digital transformation at Rite Aid, agility at Sephora and cost savings at GAP. What could you accomplish if your HQ and stores operated in lock-step?



## About Coyle Hospitality

Founded in 1996, Coyle Hospitality Group is a market leader in designing and implementing programs for customer experience, quality benchmarking, brand compliance, and market research exclusively for the global hospitality industry, including hotels, restaurants, spas, cruises, and entertainment venues worldwide.



## Study Details

In November 2020, Retail Zipline and Coyle Hospitality partnered to study 97 retail brands in the US and Canada, accounting for over \$1.2 trillion in 2019 sales.

Researchers focussed on store execution, a perennial challenge during the busy holiday season, made dramatically more difficult by the resurgent COVID-19 pandemic.

Secret shoppers hired by Coyle Hospitality visited stores across the US and Canada to observe how retailers were maintaining health and safety standards while handling typical holiday changes like increased traffic, special hours, seasonal sales and festive decor.



## We Focused on 5 Categories of Execution

Convenience  
and Speed

Health and  
Safety

Holiday  
Execution

Sales  
Execution

Signage

We also examined publicly available data, such as Glassdoor ratings and company websites, to understand areas of brand focus.

# Individual Questions and Overall Retailer Scores

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Are product shelves neat  
organized and well-stocked?  
(% Absolutely)

76%

Did the line move quickly?  
(e.g. no customer hardship or  
excessive waits observed)  
(% Yes)

85%

Were there three (3) or fewer  
people in line at any given time?  
(% Yes)

65%

**Convenience  
and Speed**

# Health and Safety



Are there reminders (e.g. signage) to maintain social distance from others? (% Yes)

**82%**

Did you feel safe shopping at this store? (% Very Safe)

**76%**

Is contactless payment an option? (e.g. can you pay With a mobile device or swipe your own card without signing a receipt?)

(% Yes)

**80%**

Was hand sanitizer available at entrance or check out?

(% Yes)

**79%**

**40%**

Was occupancy moderated to limit crowding in store? (e.g. was there a wait to enter the store or was associate at front of store tracking number of shoppers inside?)  
(% Yes)

**95%**

Were all associates observed to be wearing masks at all times? (% Yes)

**91%**

Were all customers observed to be wearing masks at all times? (% Yes)





## Holiday Execution

Can an associate answer 'What is your return policy?' (% Yes)

**93%**

Did the store feel festive? Was an effort made to make holiday shopping special? (% Absolutely)

**24%**

Were holiday hours clear and visible on signage? (% Yes)

**36%**

## Sales Execution

21%

Did a salesperson proactively approach you and tell you about sales/specials? (% Yes)

53%

Were you warmly greeted when you entered the store? (% Absolutely)

76%

When you asked salesperson for recommendation for a \$50 gift, were they able to provide one? (% Yes)

## Signage

**44%**

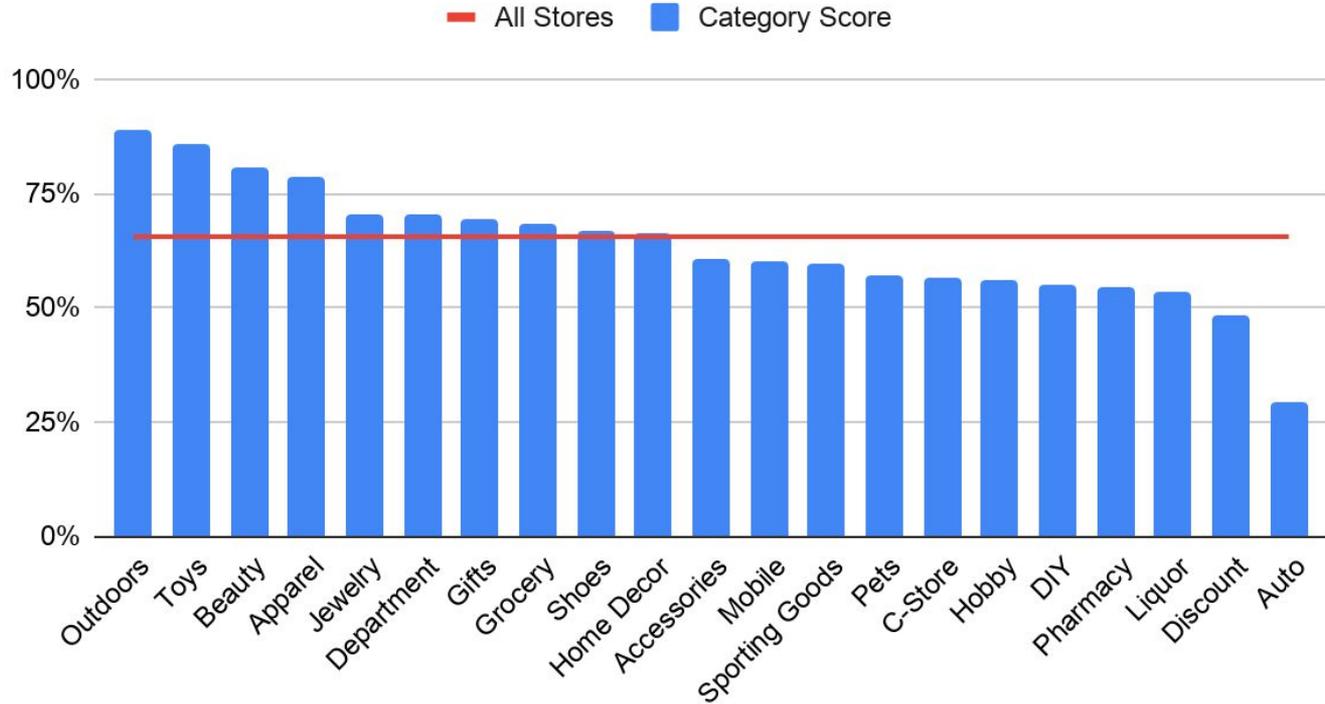
Is there signage promoting other ways to shop (e.g. website social)?  
(% Yes)

**71%**

Were promotions clear from in-store signage?  
(% Yes)



# Overall Execution

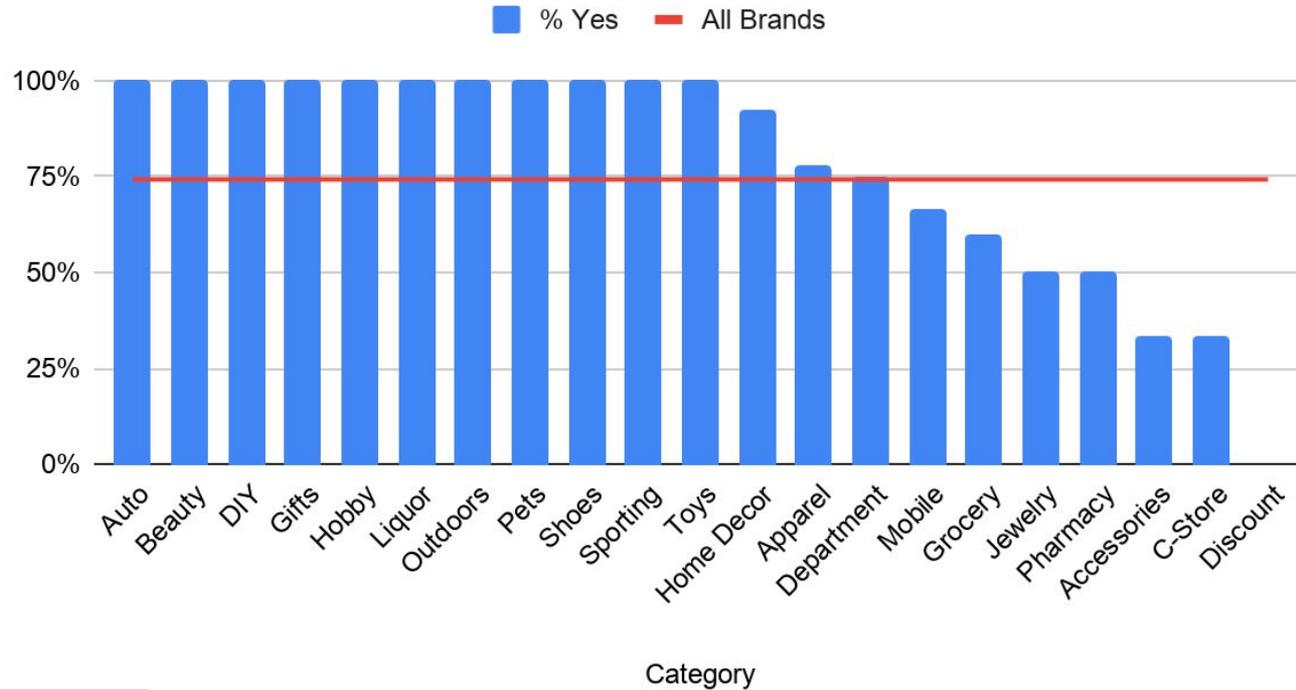




## BOPIS

Most brick and mortar retail brands offered the ability to buy online and pick up in the store, a critical offering during the pandemic when people tried to limit their time outside the home. Discount stores, convenience stores, and accessories stores were least likely to offer this option because their sales depend heavily on impulse buys from foot traffic.

## % Buy Online & Pick Up In Store



Average Health and Safety Score

78%

Average Sales Execution Score

50%

Average Holiday Preparedness Score

20%

**Safety Continues to  
Sideline Sales Execution**

*While retailers have  
mastered health and  
safety execution, they  
are having a harder time  
keeping performance  
high in other areas.*

## Geographic Differences in Health and Safety Response



The behavior of stores and their customers seem to be affected by prevailing attitudes towards the pandemic. Stores in New York, California, and Canada took greater precautions while those in the interior of the US took less.

Customers in NY, CA, and Canada were *far* more likely to wear masks (98%) when compared with those in the interior US (82%).

85% felt very safe in NY / CA / Canada while only 67% felt very safe in the interior US.

## Questions about Health and Safety

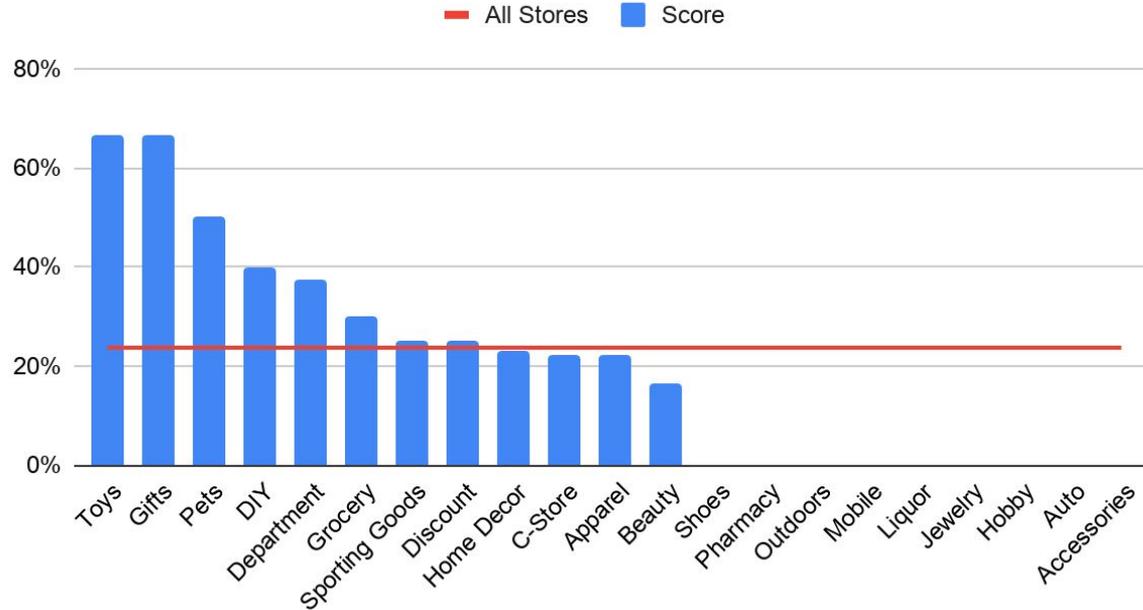
	Interior US	NY, CA, Canada	Grand Total
Are there reminders (e.g. signage) to maintain social distance from others? (% Yes)	80%	85%	82%
Did you feel safe shopping at this store? (% Very Safe)	67%	85%	76%
Is contactless payment an option? (e.g. can you pay with mobile device or swipe your own card and not sign receipt?) (% Yes)	91%	71%	80%
Was hand sanitizer available at entrance or check out? (% Yes)	69%	88%	79%

## Continued

	Interior US	NY, CA, Canada	Grand Total
Was occupancy moderated to limit crowding in store? (e.g. was there a wait to enter store or was associate at front of store tracking number of shoppers inside?) (% Yes)	16%	62%	40%
Were all associates observed to be wearing masks at all times? (% Yes)	89%	100%	95%
Were all customers observed to be wearing masks at all times? (% Yes)	82%	98%	91%
<b>Health and Safety Total</b>	<b>71%</b>	<b>84%</b>	<b>78%</b>

# Holiday Preparedness

Did the store feel festive? (% Absolutely)



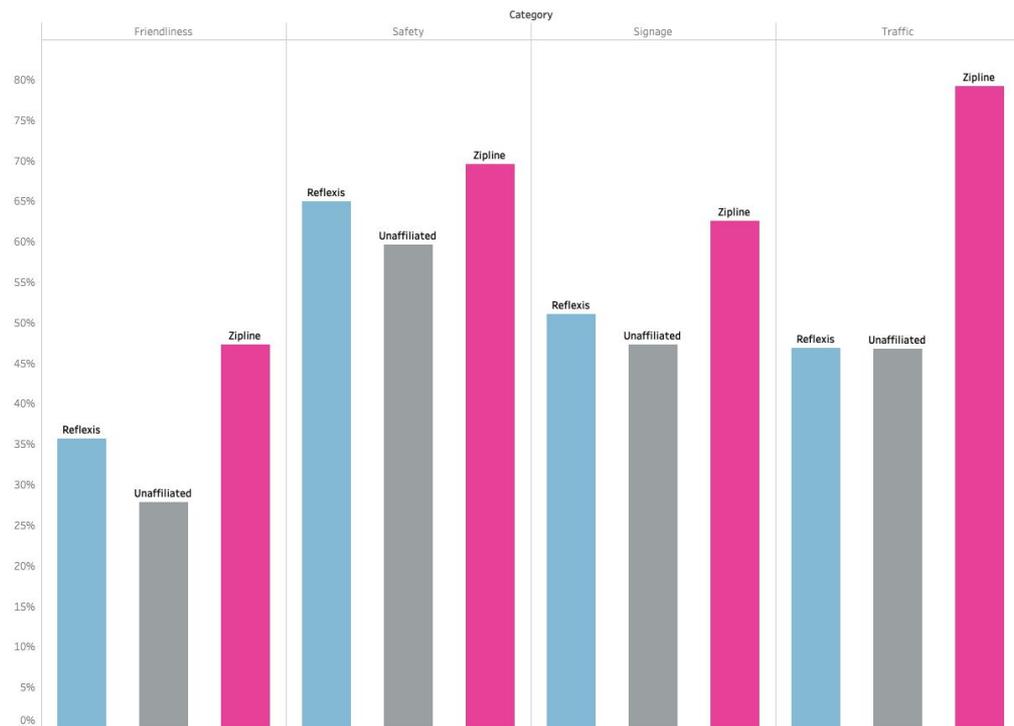
Only 24% of retailers created an environment that felt “festive” this year. However, two-thirds of toy and gift stores got into the holiday spirit - after all, their businesses heavily depend on the holiday season.

## Correlation between employee engagement and store execution

Companies with high ratings ( $\geq 3.5$ ) on Glassdoor performed 13% better overall than those with low ratings ( $< 3.5$ ).

This difference was particularly pronounced on measures of personal interaction, e.g., proactively approaching the shopper regarding sales / specials (+115%) or greeting the shopper warmly (+44%)



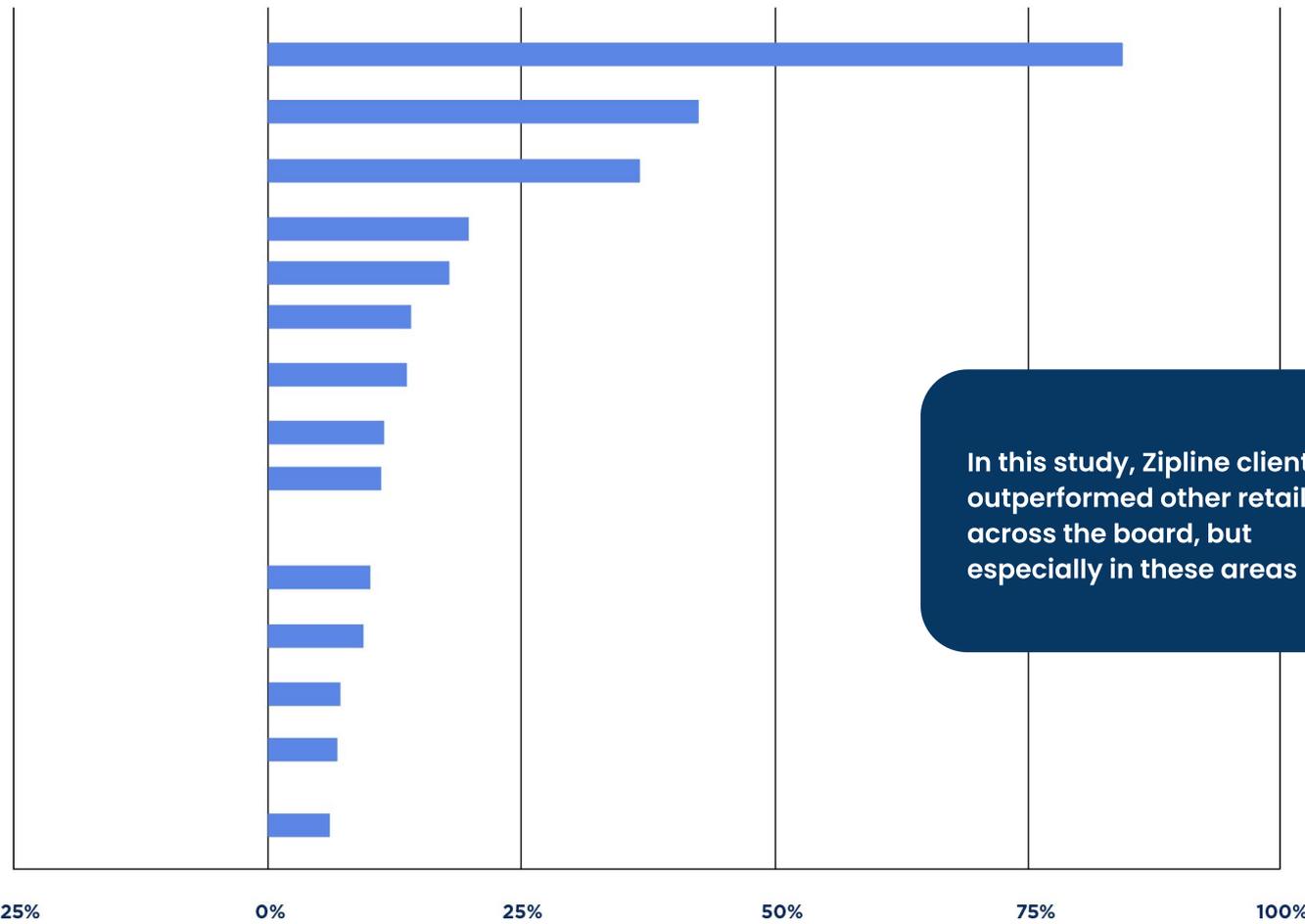


## Correlation between communications platform usage and store execution

In 2020 we analyzed NAPCO's Health and Safety Study data and found that companies that use communications and task management platforms perform better than other companies.

Would lightning strike twice? We isolated our customers in the Coyle data set to find out.

- Did a salesperson proactively approach you and tell you about sales/specials? (%Yes)
- Were you warmly greeted when you entered the store? (% Absolutely)
- Were there three (3) or fewer people in line at any given time? (%Yes)
- Was hand sanitizer available at entrance or check out? (%Yes)
- Did you feel safe shopping at this store? (%Very Safe)
- Were all customers observed to be wearing masks at all times? (%Yes)
- Are there reminders (e.g. signage) to maintain social distance from others? (%Yes)
- Were promotions clear from in-store signage? (%Yes)
- Was occupancy moderated to limit crowding in store? (e.g. was there a wait to enter store or was associate at front of store tracking number of shoppers inside?) (% Yes)
- Are product shelves neat, organized and well-stocked? (%Absolutely)
- Can an associate answer "What is your return policy?" (%Yes)
- Were all associates observed to be wearing masks at all times? (%Yes)
- Did the line move quickly? (e.g. no customer hardship or excessive waits observed) (%Yes)
- When you asked salesperson for recommendation for a \$50 gift were they able to provide one? (%Yes)



**In this study, Zipline clients outperformed other retailers across the board, but especially in these areas**

# Top Performers

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Retailer	Overall Score
Maurices	97.67%
Hy-Vee	97.67%
Disney Store	95.50%
GAP Inc	94.67%
Build a Bear	93.17%
Macy's	90.00%
Ikea	86.50%
Sephora	85.67%
Lululemon	85.50%
Casey's	85.50%



To get your company  
or category's score and  
detailed results, please email

[marketing@retailzipline.com](mailto:marketing@retailzipline.com).