

NAPCO Results

Analyzing the data from NAPCO's
Health and Safety Readiness Study

Survey Methodology

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NAPCO looked at publicly available information about each retailer's COVID-19 response measures as well as the in-store customer experience, as experienced by secret shoppers. The first round of visits was conducted in late summer.

To evaluate their progress in the months since, an identical follow-up assessment was conducted over a three-week period in December.

Scoring Criteria

29 Evaluation Criteria, 65 Max Points

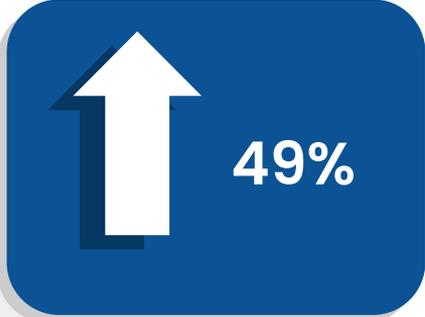
- Signage - 12 Points
- Safety Measures - 30 Points
- Traffic - 8 Points
- Payment Technology - 6 Points
- Friendliness - 9 Points

Analysts scored each retailer on the safety measures that they have put into place as well as how effective they were at enforcing those protocols, all with the goal of minimizing the shopper's COVID-19 risk.

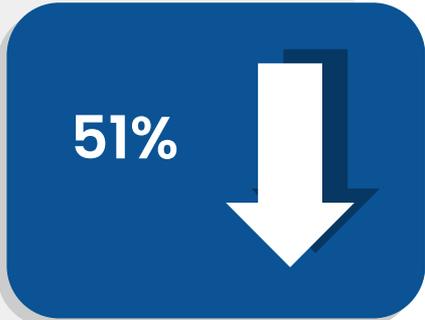
Through a partnership with NAPCO, Retail Zipline got access to the raw data for its own findings.

In this report, we look at the changes from summer to winter.

Overall, not much has changed – – less than 1% overall



In the second assessment of COVID-19 readiness, **49 percent** of retailers improved their scores, while **51 percent** saw their scores decrease.



In many of the individual categories, there was little change between the two assessments.

And while individual companies' scores in the safety category showed changes from the first assessment to the second, overall, the category average remained at 68 percent of possible points scored.

| | Visit 1 | Visit 2 |
|----------------------------|---------|---------|
| Average Traffic Score | 49% | 55% |
| Average Friendliness Score | 30% | 29% |
| Average Signage Score | 49% | 47% |
| Average Safety Score | 68% | 68% |

Overall, only traffic scores improved. Safety scored stayed the same and Friendliness and Signage decreased a bit.

Retailers had six months to improve so we dug deeper to find out if anyone was improving.

Essential Retailers Have Caught Up to Non-Essential Retailers

Visit 1 Visit 2

Essential Average Score

48%

43%

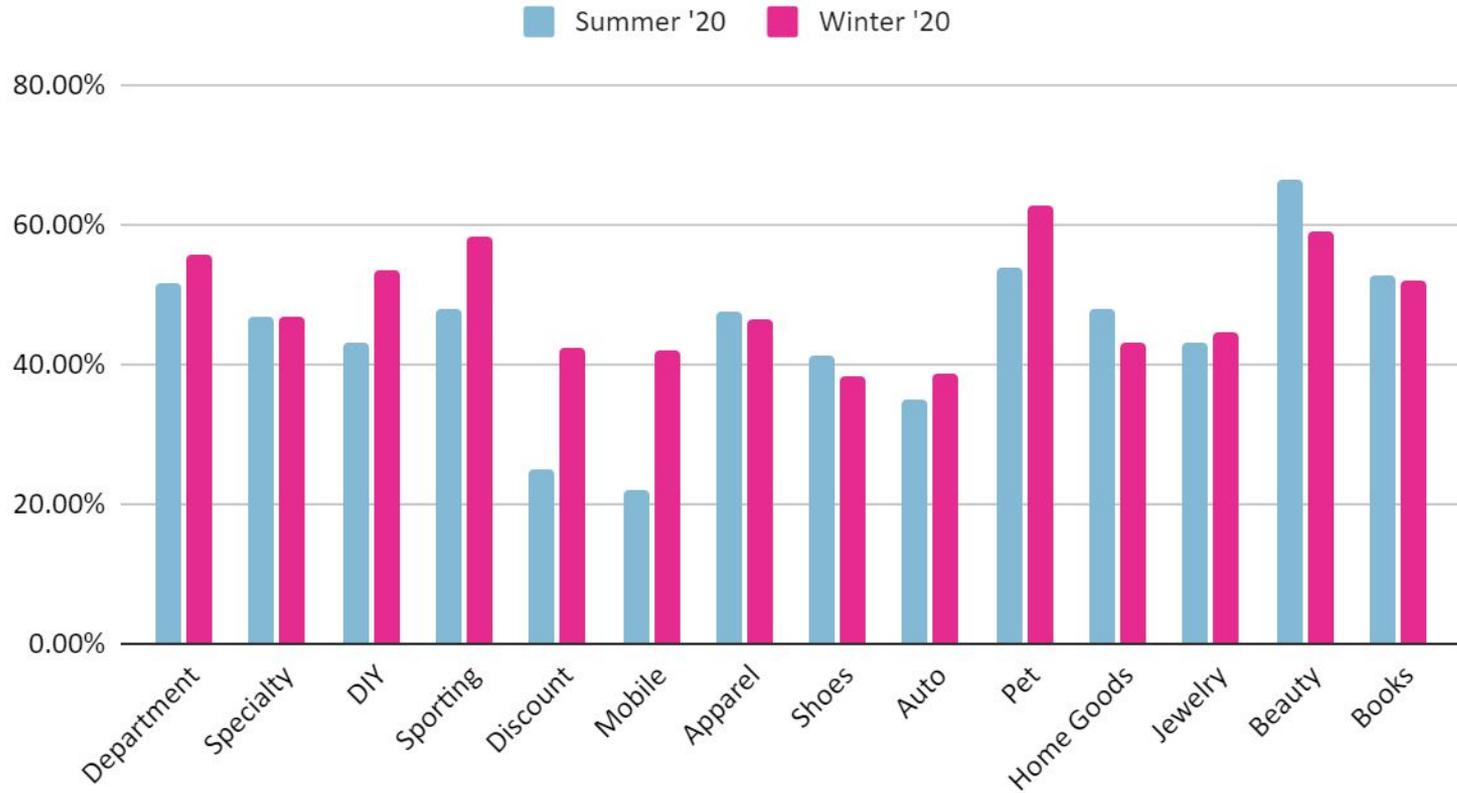
Non-Essential Average Score

47%

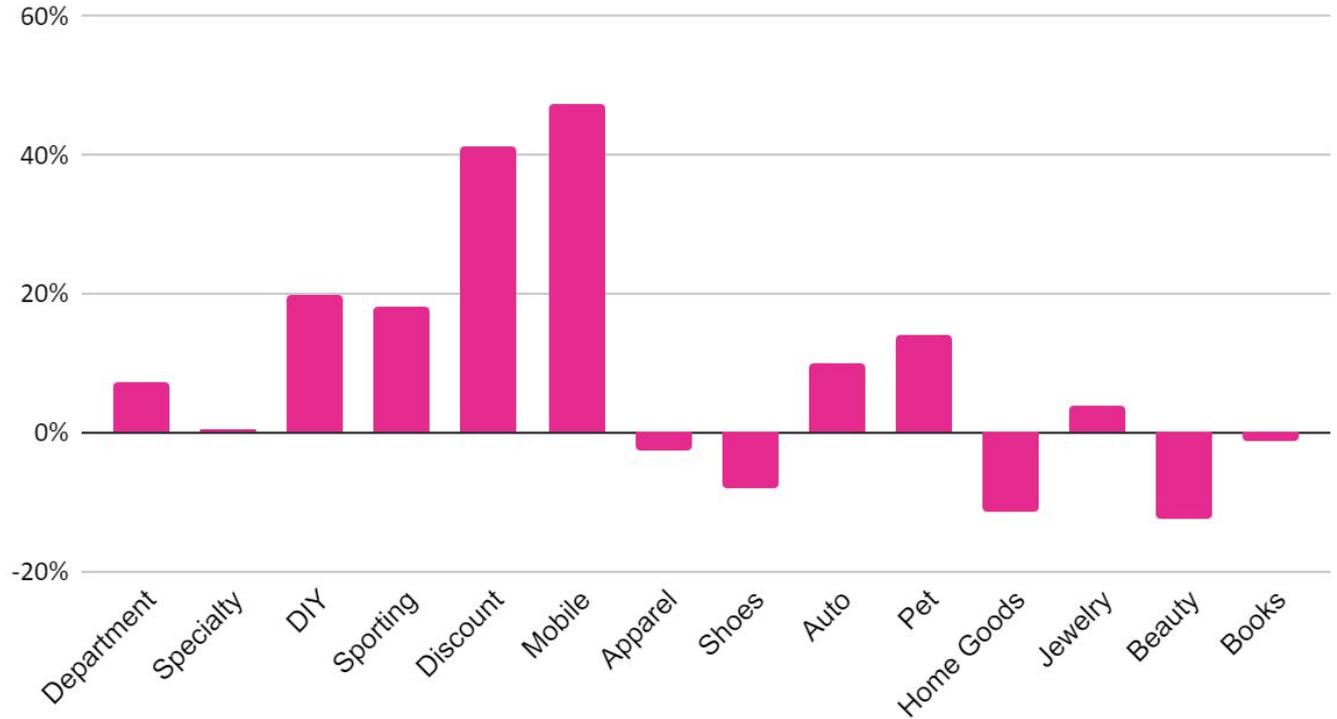
46%

Essential Retailers didn't shut down to prepare for Covid-19 like Non-Essential Retailers. We surmise that with more time, they were able to get their policies and procedures in place.

Survey Results by Retail Category

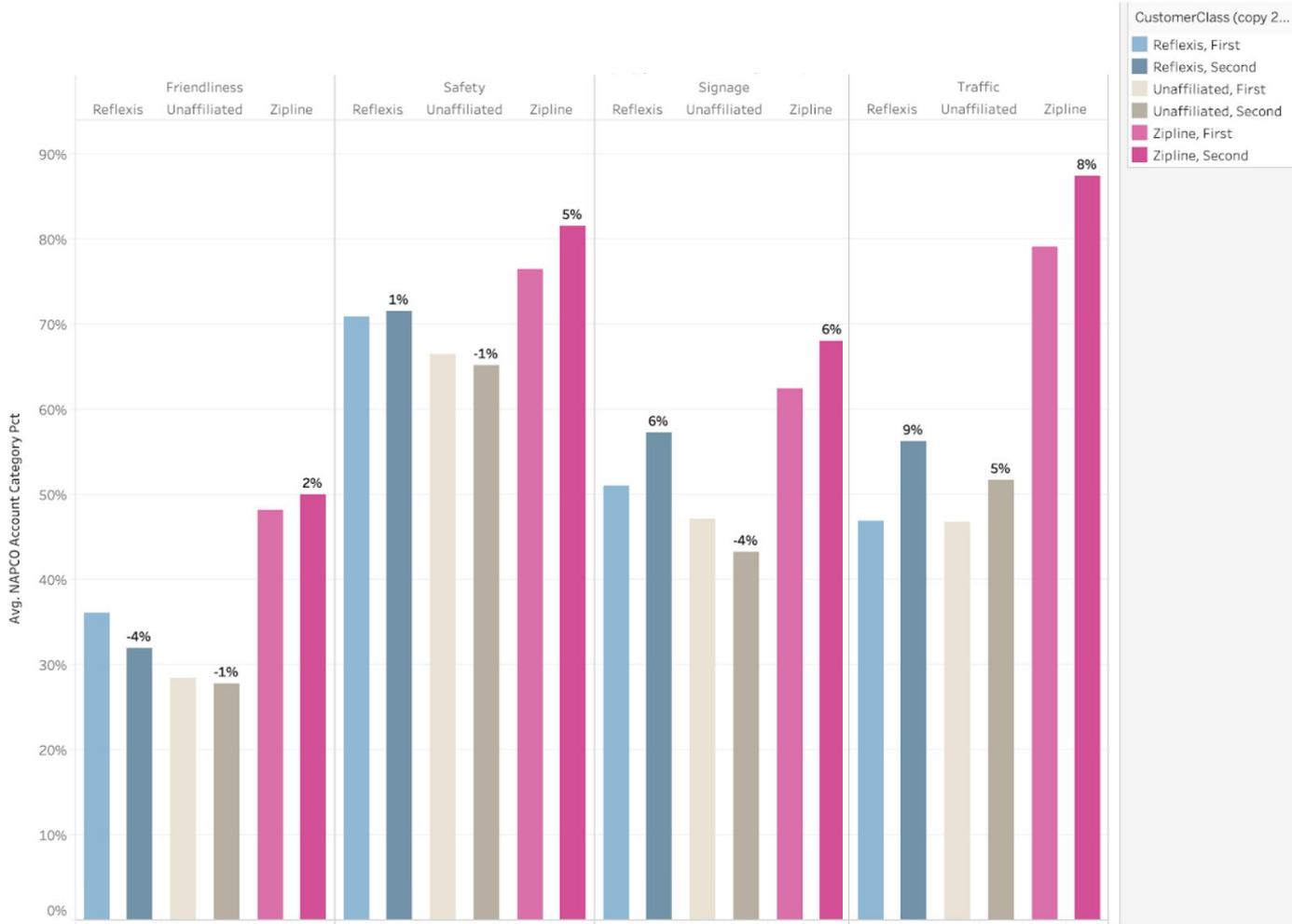


Improvement from Summer to Winter by Retail Category



While many retail categories saw little or negative change, Discount Stores and Mobile Phone Stores improved by over 40%.

But the change is dramatic for Zipline customers



Zipline customers jumped an average of 8 places in the rankings.

Zipline customers outperformed non-Zipline retailers by a margin of 12% in the first study. In the second study they improved to score 20% better than non-Zipline retailers. Zipline customers' improvement was over **8X** greater than that of non-Zipline retailers.

Three of the Top 5 Retailers are Zipline Customers

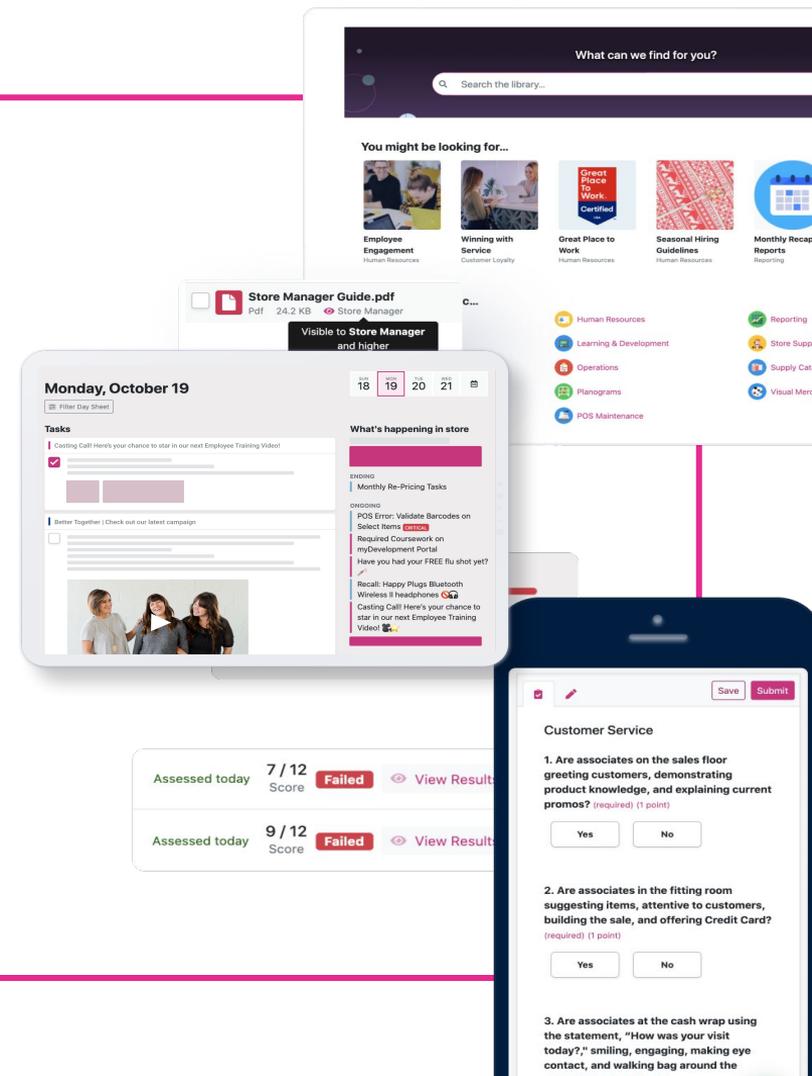
| | |
|---------------------------------|-----|
| Best Buy | 79% |
| Target | 76% |
| L.L.Bean | 72% |
| American Eagle Outfitters, Inc. | 71% |
| Lululemon | 71% |

How did your brand do?
Email marketing@retailzipline.com
to see your scores

Zipline is the only solution on the market that combines store communication and task management to drive **flawless execution.**

“Zipline gets the exact right information to the exact right people in the exact right way.”

– Elliot Percival, Retail Ops, TOMS





**We're looking forward
to working with you.**