



The new kiosk era

5 ways to boost income,
engagement and ROI



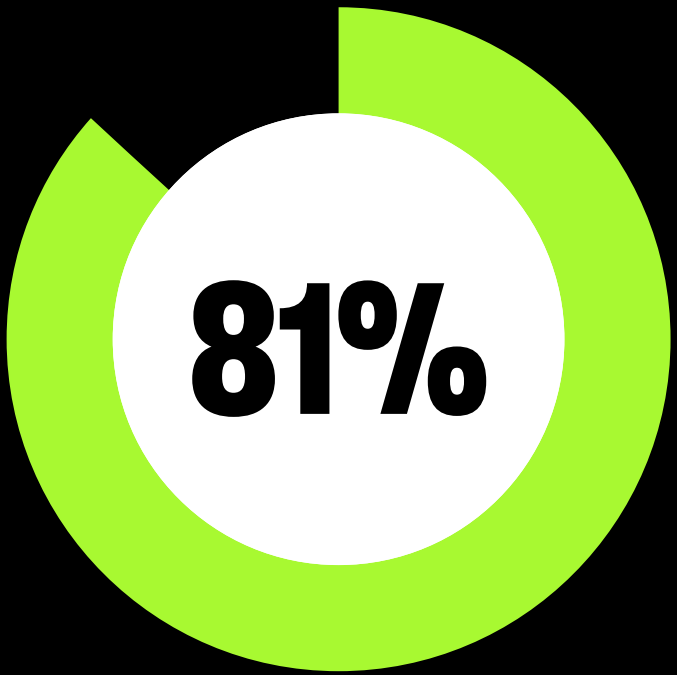
The kiosk advances

Self-service is a key part of retail. And now, with advances in technology, a new era of kiosk innovation is here, which will further enhance shopper engagement and reduce costs while creating new and promising subsidiary revenue streams.

Kiosks can look broadly similar. But their specifications, the way they are built, and the software which runs them are different. As ever with technology, the choices retailers make about which kiosk solution to buy have a major impact on the returns. With this front of mind, the five sections below look at both the mainstream and creative applications of kiosks, and recommend the questions retailers need to think about, from both technology and shopper experience perspectives, to select the best solution for their businesses.

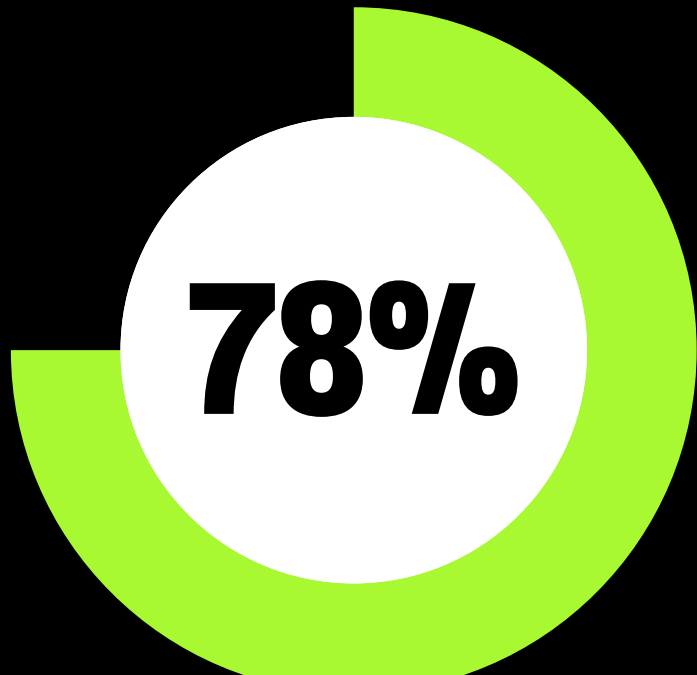
As the analysis explains, when the fit is right, the returns can be eye-catching.

Over the years, Zebra Global Shopper Studies have revealed that increasing numbers of shoppers are using self-service solutions, driven by speed and convenience. The research continues to monitor a growing affinity for kiosks.



of shoppers want more
self-service options

CXM Today, 25th May 2022



agree self-checkouts
improve service

Zebra Global Shopper Study, 17th edition



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1. Provide immediate service

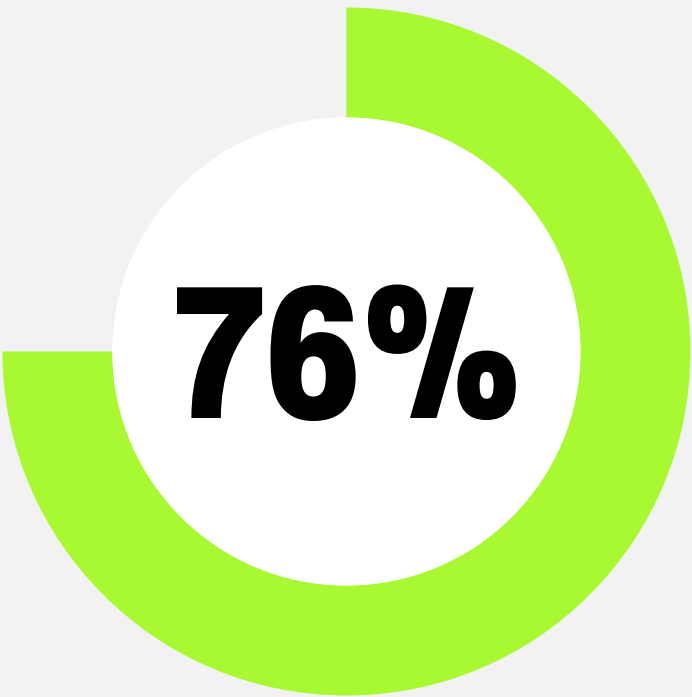
It was only a few years ago that retail associates had set roles. Some worked checkouts, others the back of the store, while some were naturally suited to assisting customers. But today, associates need to move quickly between tasks, often managing multiple roles at once.

Kiosks alleviate the demands placed on associates by appealing to the **52%**¹ of shoppers expecting instant service, with similar numbers saying they will not wait more than three minutes in-store. Indeed, advances to existing use cases, such as self-checkout, are being complemented by new applications, with kiosks becoming the preferred channel for a range of tasks for time-pressed shoppers. Examples across retail sectors include:

- **Endless aisle** – shoppers can use kiosks to view retailers’ entire inventories to prevent lost sales due to stockouts. For example, a camera retailer, with limited space, can enable its shoppers to view a full family range of cameras, with interactive product information, and select, buy, and arrange home delivery for the model they want. Such applications appeal to the **78%**² of shoppers who prefer a blend of online and in-store shopping.
- **Loyalty management** – kiosks provide a quick and easy self-service option for new customers to enroll in loyalty programs and, with scanners able to recognize IDs, retailers can eliminate the need for paper forms or waiting for staff assistance. It’s simple to manage accounts, too, from registering for discounts, to redeeming points and updating details, and much more.
- **Frictionless point-of-sale** – kiosks offer quick and straightforward checkout experiences. And, in retail categories where RFID is used, notably fashion and electronics, shoppers can place items in a designated bin or area for each kiosk, and the amount owing is automatically displayed on the screen. They tap to pay, or insert their card, and print or select an email receipt.

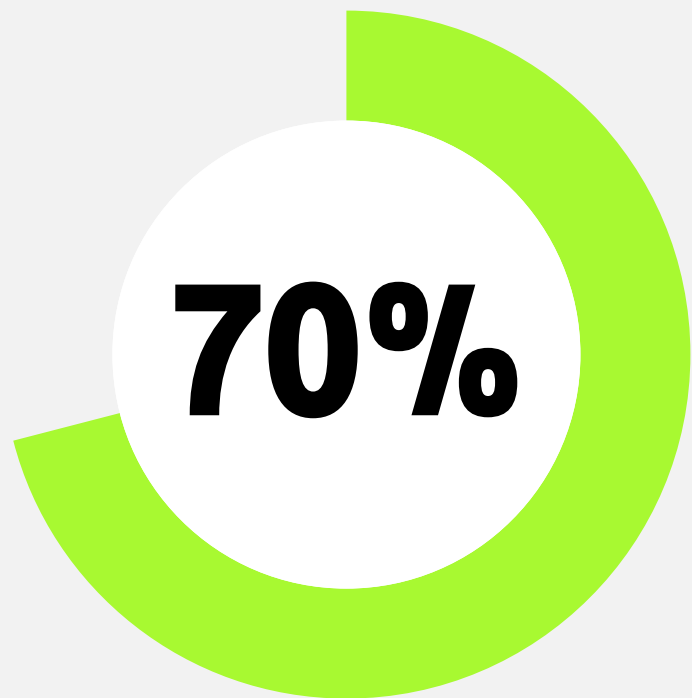


The pressures faced by associates have not gone unnoticed:



of shoppers value speaking to staff

Zebra Global Shopper Study, 17th edition



say it's hard to find someone free

Zebra Global Shopper Study, 17th edition

¹The Time to Win, The Consumer Patience Study Jay Baer,
²Zebra Global Shopper Survey, 17th Edition

- **Digital signage and product finding** – Zebra’s retail customers say any interaction, either with a kiosk or store associate, can significantly boost sales. And, by placing kiosks in strategic areas, shoppers can be presented with location-relevant content and easily access instructions to locate what they are after or to call for help.
- **Retail media networks** – the rise of in-store advertising is a fast-evolving market with predictions that advertising on retail-owned platforms will surpass spend on television (see section 3)³. Kiosks provide the opportunity for retailers to easily run targeted in-store media and advertising programs with the promise of lucrative supplementary revenue streams.
- **Easy returns** – with **17%⁴** of items returned, managing incoming goods remains expensive. Kiosks can ease this. Shoppers print or download a barcode or QR code at home, then use the integrated kiosk scanner in-store to read it and place their items in the returns bin while selecting a printed or email receipt. Or, in the case of an RFID-based returns system, if the tag is still attached, they take the item back to the store, place it in the returns bin, and, again, select their receipt option. Costs reduce as the returns area can be automated, with a help button to hand if shoppers need it.
- **24X7 commerce** – one of Zebra’s customers, a leading DIY retailer, is providing anytime touchscreen access to purchase its most popular SKUs through secure vending-style cabinets, offering ultimate convenience to tradespeople and home DIY enthusiasts.
- **Simple buy online, pick up in-store (BOPIS) services** – with shoppers who have ordered online having little patience for queues, kiosks make them feel they are getting immediate assistance. Fewer associates are needed to run services, reducing transaction costs, with the added benefit that more staff can focus on assisting customers in-store.
- **Virtual concierge** – kiosks are effective at concierge services, providing quick and clear responses to a range of shopper queries, from wayfinding, product catalogs, and how-to videos, to selecting and buying items for home delivery.

And now, the confluence of advancing technology, such as AI, voice recognition, faster processors, location-based advertising, and cloud computing, is creating a blank canvas for a new wave of shopper interactions.

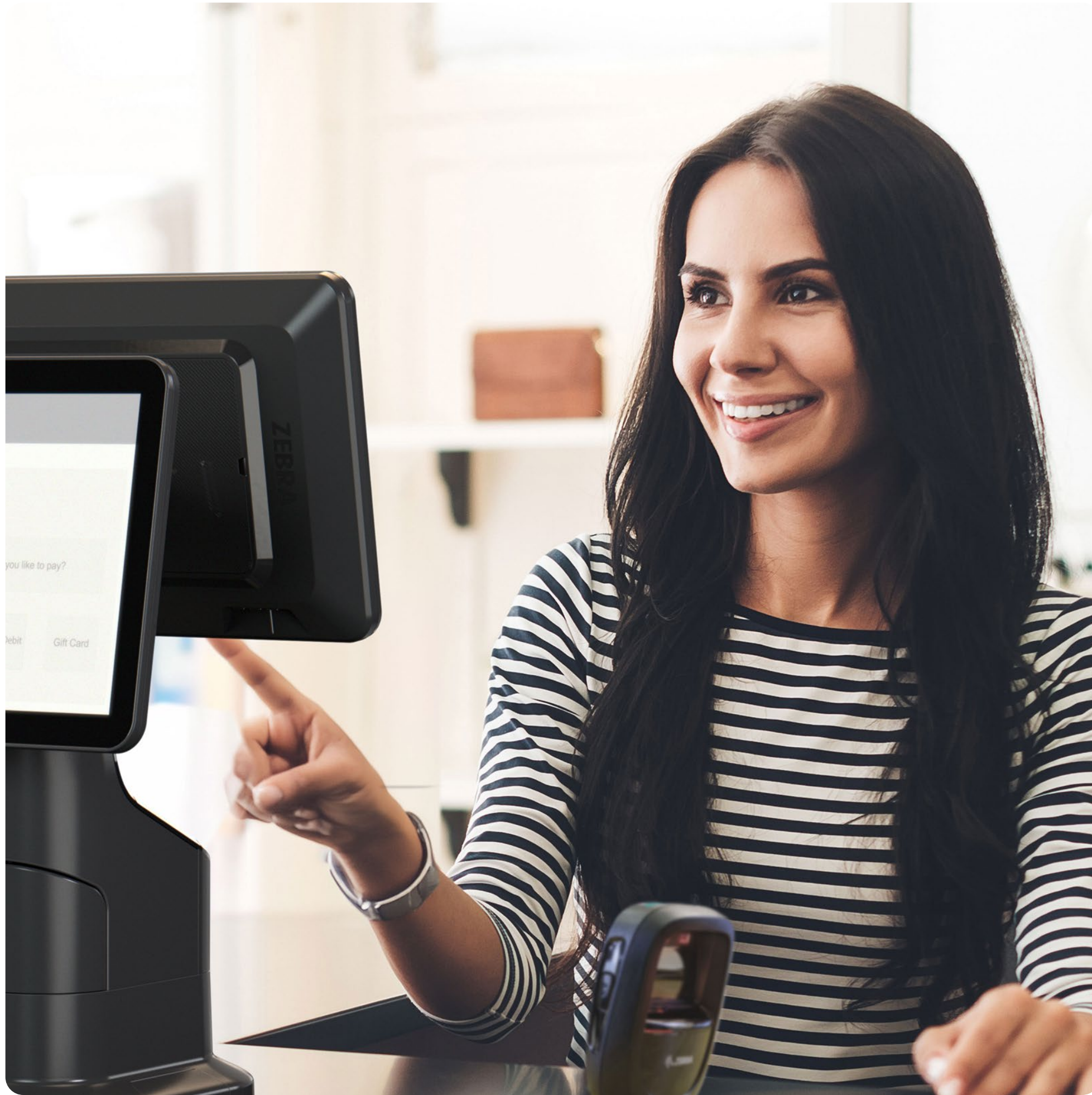
³LBB online, ⁴NRF

2. The power of possibility

A growing number of Zebra's retail customers are piloting or rolling out smart applications with the goal of attracting shoppers to stores and keeping them there for longer. Examples include:

- **You look fabulous** – Zebra's retail customers are growing sales and upselling to shoppers by providing fashion recommendations through kiosks. The suggestions are based on what someone walks in wearing, or what they are trying on. If shoppers provide their loyalty details to kiosks, recommendations can be further personalized. This appeals to the **75%**⁵ of shoppers who say they are more likely to try something if the suggestion is based on their preferences. Shoppers can also send messages to associates' mobile devices, via the kiosk, to ask for new items or different sizes, so optimizing sales opportunities. And, where a retailer has relationships with brand ambassadors or influencers, avatars (with appropriate permissions of course) can allow shoppers to access and “consult” the influencer's sense of style. With a click, or voice instruction, shoppers can share their look with friends and post it to their socials.
- **Dream in color** – in large retail formats, finding associates can be a frustration. With this in mind, a major retailer is using Zebra kiosks in its aisles to maximize sales opportunities by ensuring shoppers have immediate access to its view its product in different colors prior to purchase. The high-definition screens provide an accurate representation of color options, which shoppers can select and pay for at the kiosk.





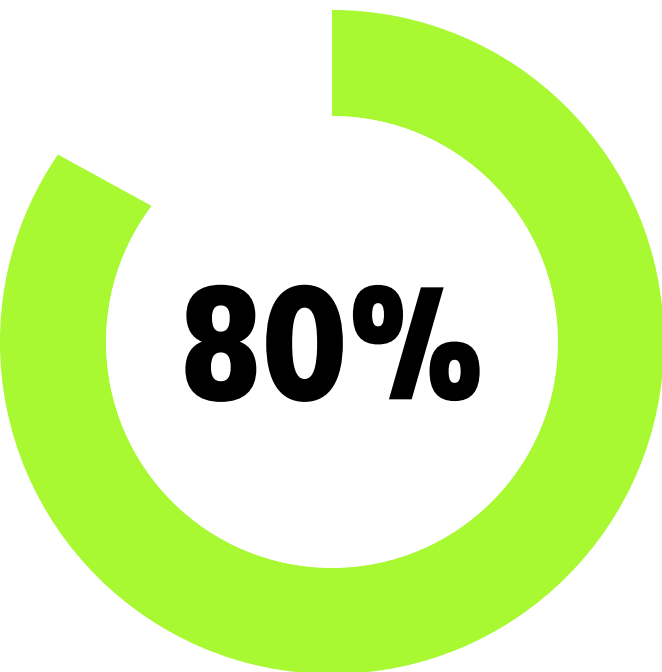
- **There is a wine for that** – only around **10% to 12%**⁶ of shoppers are knowledgeable about wine. It's a great opportunity for forward-thinking retailers. For example, shoppers can scan an item at the kiosk and view wine recommendations for that item.
- **Your sneaker, your way** – as well as providing access to endless aisles, kiosks enable customization. It's a fun way for shoppers to engage with brands, create their one-of-a-kind item, and order it for delivery or to pick up in-store. It's a rich opportunity; the global market for customized sneakers alone is projected to hit **\$10.8 billion** by **2030**⁷, driven by the digitalization of design technology.

Furthermore, as discussed below, kiosk innovation can extend to using a network of screens to create revenue streams by selling media space.

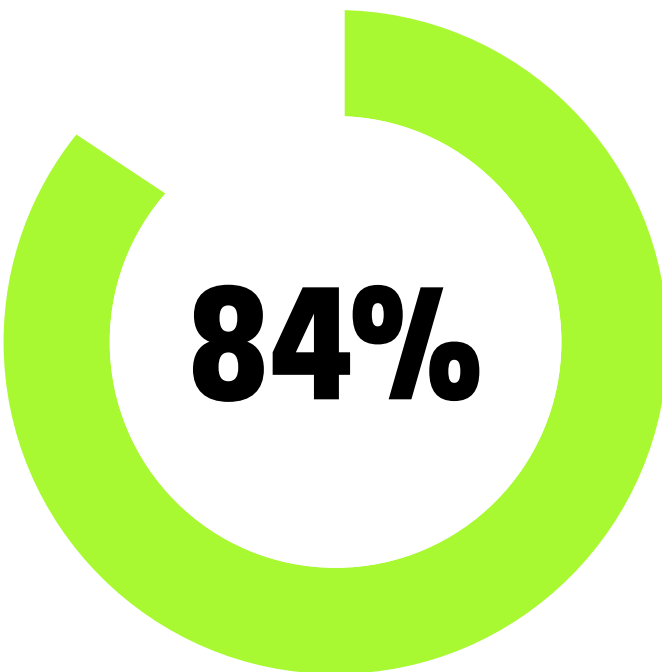
3. Move to monetize

While **80%** of retail spending happens in-store, **90%** of retail advertising happens online⁸. This imbalance is starting to change. In the UK, Sainsbury's Live, the retailer's in-store media network, generates 17 million impressions every week, with the screen network set to increase from over **200** to over **400** in 2025⁹. Indeed, there are predictions for steep rises in spending on advertising in-stores, not least because in-store audiences are **84%** greater than digital audiences¹⁰. For example, Walmart has a monthly audience reach of 194.2 million unique visitors in-store and 126.5 million unique visitors online¹¹.

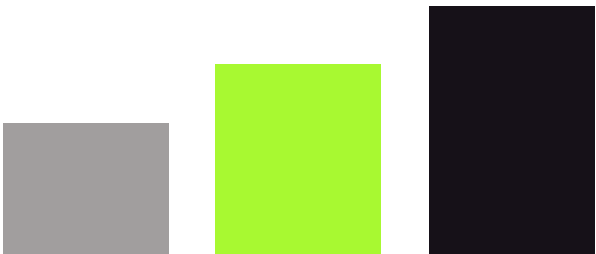
And with worldwide retail media ad spending on track to increase by nearly **\$100 billion** between 2020 and 2025¹², there is a lucrative opportunity to grow existing and create new revenue streams from advertising. Especially with the Boston Consulting Group estimating that margin from selling space across physical and virtual spaces is between **70%** and **90%**¹³.



of retail spending
happens in-store



in-store audiences
are larger than
online audiences



**\$100
BILLION**

spend on retail
advertising media
between 2020 and 2025



⁸Advertising Week, ⁹Clear Channel, ¹⁰emarketer, ¹¹emarketer, ¹²emarketer, ¹³Boston Consulting Group



The large media networks have in-store advertising platforms. Outsourcing to them remains attractive. However, the best kiosk solutions make it easy to distribute, schedule and track engagement with content, providing the option of bringing media in-house. It's important, however, to understand how simple and robust the kiosk content management platform is.

When using kiosks for advertising and media partnerships, it is important to dive deep into the scheduling software. It must provide an intuitive graphical user interface (drag and drop) that makes it easy to create and manage complex schedules, define playlists, and apply policies and rules for specific kiosks and content files. There should also be the facility to virtually test content before it goes live to consumers. Look also for versatile licensing models. For instance, we offer two levels. A license-free option is for more straightforward content strategies, which allow you to store specific content files on individual kiosks and define when the files will play per store.

4. Optimizing performance. Reducing cost

Installing a network of kiosks adds to your task lists. What's more, on an ongoing basis, firmware needs to be updated, security refreshed, and new apps loaded. It follows that the sophistication and ease of use of the management software has an outsized impact on the total cost of ownership (TCO) of kiosk devices – this is where Zebra DNA Software comes into its own.

Unmatched Manageability

Retailers asked us to create a kiosk solution. The main reason for this is to benefit from Zebra DNA software. The suite of utilities, tools, and apps is widely used across retail to ease the deployment, maintenance and optimization of our mobile computers and tablets to boost productivity while lowering total cost of ownership. The Mobility DNA suite is optimized for kiosks, with the intention of ensuring that just as the devices are intuitive for shoppers to use, they are a joy for your IT team to work with. Key features of the suite include:

- **Hassle-free deployment** – your IT team can stage a network of kiosks remotely with accelerated and simple ways to configure each device, saving significant time, resources and cost during rollouts. The same applies to software updates, which are easy to schedule, and with your team likely to be familiar with Mobility DNA there will be no learning curve to go through when deploying our kiosks.
- **Simple management** – Mobility DNA's suite of tools, utilities and apps make it easy to manage, update, and triage any kiosks issues, so further reducing the burden on your tech team. They also accelerate app development and help create rich and intuitive experiences which will engage your shoppers.





- **Continuous improvement** – benefit from an ongoing flow of software enrichments, upgrades, and future releases which enhance performance, provide greater device protection and evolve your kiosks with your business. You will also receive a stream of proactive recommendations to pre-empt problems, enhance kiosk performance and help your IT team enhance productivity while reducing costs.
- **Robust Security** – With MX Extensions fortify and strengthen Android for use in the enterprise with a layer of functionality which enhances kiosk security, management, and Wi-Fi connectivity to ensure your shoppers have an enjoyable self-service experience.

As well as the management software, you may want to consider using a managed service team to deploy kiosks to reduce costs and accelerate projects. Our team is highly experienced and will work to predefined key performance indicators. Also evaluate the level of support that is available and how comprehensive vendors are promising to be (we have an option of no questions asked rapid device replacement and comprehensive support, 24X7).

5. The best kiosk solution: what to look for

Your shops will be busy. They may be noisy, and very bright (or dark). And your shoppers have varying degrees of comfort when it comes to using digital technology, while some will have disabilities to contend with. These considerations should be front of mind when selecting kiosks, and we recommend thinking deeply about:

- **The environment** – content must be seen and heard, while kiosks need to understand speech. We recommend testing speaker performance and assessing what algorithms are built in to filter out background noise, and how effective these are. We also suggest reviewing the sophistication of the microphones which is essential for voice recognition – ideally, there would be more than one. And select bright screens (with smart power reduction tech built in to optimize running costs).
- **Ease of use** – it's important to keep shoppers' attention focused on the screen. That's why our kiosks run the Android™ operating system (OS), the same platform shoppers are familiar with on their own smartphones and tablet devices, and which is also easy to deploy, manage and optimize.
- **Accessibility** – kiosks need to be usable by all shoppers. That's why we have created a flexible mounting system, with a range of installation options (create single or double-sided installations and mount the kiosks on the wall, countertop desk or floor). The versatility makes it easy to create solutions that are accessible to all, and to help you comply with the American Disabilities Act (ADA) in the United States, the European Accessibility Act (EAA), the Accessible Canada Act (ACA) and other international organizations.





- **Installation and configuration** – we advise looking for kiosk solutions that offer a modular build with options to add peripherals like a printer, scanner, lightbar, and more, along with an elegant design to deliver a great experience. With installation, it's critical to have power over ethernet (PoE) embedded (not as a module), to simply connect kiosks using a single ethernet cable without any need to rip out or replace power lines. And, to prioritize PoE performance to ensure maximum screen brightness, speaker volume and peripheral support.
- **Data and analysis** – you should be able to view similar engagement data from your kiosks that is available from social channels and websites, like user interactions, page dwell times and popular content. Vendors offer different levels of insight. But ultimately, what can be measured can be improved, so look for the best real-time analysis.
- **Shopper-proof** – shoppers carry and drop and splash drinks and food, so it's advisable to select robust devices designed to weather life in-store.
- **Certifications** – look for vendors who certify apps to work on their kiosks for the assurance of stable, engaging and secure customer experiences.
- **Enterprise mobility management (EMM)** – check if you can easily connect kiosks to your EMM (if you have one). While most kiosk vendors offer this configuration, the level of control available between them differs hugely.

Behind Every Great Piece of Hardware Lives Great Software

Retailers' associates value our kiosks, recognizing they help take the strain, and often use the kiosks themselves to manage tasks. As new applications come on stream, the value of kiosks will increase and the technology will help front-line teams better serve shoppers every day.

The design of kiosks, from display quality, and processor, greatly influences your shoppers' experiences. This said, the software that sits behind kiosks will, ultimately, define the cost of ownership of devices and the overall return on investment. It's important to think long term, too, as you don't want to have to replace kiosks in a couple of years, and the level of future-proof technology built into both hardware and software will ensure devices can be optimized, improved and adapted to changing commercial needs over time. Spending a little more up front will save, and earn, you more money in the long run.

If you have questions about how to select the best kiosk solution, please contact us using the details below.



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