

EMPOWERING RETAIL ASSOCIATES SOUTH AFRICA

How Technology Can Address Rising Frontline Workforce Challenges

RETAIL ASSOCIATES – THE LIFELINE OF THE SECTOR

In the digital era, technology is empowering every aspect of work. Despite the size of the workforce and the importance of their work, retail associates have traditionally been underserved by technology, yet the challenges they face keep rising. As we enter the post-pandemic era, the way retail associates function in the store needs to be reimagined, with an emphasis on fostering human-machine collaboration, enabling new skills and worker experiences, and supporting a workplace that blends physical and digital tools.

81%

of retail associates believe that technology would enable them to do their job more effectively.

EMPOWERING FIELD WORKERS THROUGH TECHNOLOGY

70% 81%

Technology enables the frontline organization to do the job better

70% 77%

Technology makes the frontline more engaged with the organization

● Retail Managers

● Retail Associates

Sources: Source: IDC Frontline Workers Survey, November 2022 Retail sector, South Africa

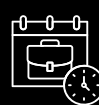
KEY CHALLENGES FACED



RETAIL ASSOCIATES

38%

of the retail associates feel that their working hours are long, and their schedule is rigid, leading to increased stress and attrition.



Work Schedule

38%

15%

47%



Staff Availability

27%

15%

58%



Quality of Work

25%

18%

57%



Stress

24%

20%

56%



Unhappy

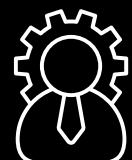


Neutral



Happy

Source: IDC Frontline Workers Survey, November 2022, Retail sector, South Africa



MANAGERS

47%

of the retail managers cited employee stress and mental health as the biggest challenge

47%

Managing employee stress and mental health

40%

Keeping frontline workers motivated

32%

Finding people with the necessary skills

Source: IDC Frontline Managers Survey, November 2022 Retail sector, South Africa

RETAIL ASSOCIATES DIGITAL TRANSFORMATION MATURITY

Processes Digital vs. Paper

60%

of retail associates indicated that half or more of their processes are paper based.

All processes are digitalized	9%
Most processes are digitalized, while a few are still paper based	32%
A 50:50 mix of paper-based and digitalized processes	34%
Most processes are paper based, while a few are digitalized	16%
All processes are paper based	10%

Stage 5

Stage 4

Stage 3

Stage 2

Stage 1

Digital Maturity Compared with Peers

16%	Best in class
21%	Exceeds peers
38%	On par with peers
20%	Behind peers
4%	Far behind peers

62%

of retail associates believe that their organization is below or at par with the industry average.

Source: IDC Frontline Workers Survey, November 2022, Retail sector, South Africa

KEY IMPROVEMENTS TECHNOLOGY CAN BRING

52%

of the retail associates indicated skills development as a key area for improvement through technology.



52%

Skill development training and learning



50%

Customer experience



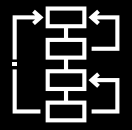
38%

Communication within the frontline organization



32%

Identity and access management



28%

Task and workflow management, scheduling, approvals



24%

Access to information

Source: IDC Frontline Workers Survey, November 2022, Retail sector, South Africa

ESSENTIAL GUIDANCE



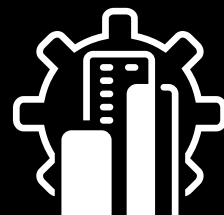
Improve Retail Associates' Productivity through Digital Tools

Prioritize employee productivity improvement and employee experience enhancement in field workforce transformation efforts. Invest in digital tools for workflow management, automation, and communication.



Develop Retail Associates' Skills Through Virtual Training and Learning

Invest in virtual training tools such as conferencing applications, and e-learning platforms to address the burgeoning skills challenges among retail associates.



Accelerate Retail Associates' Digital Evolution

Accelerate digital transformation among retail associates to reduce the reliance on paper-based processes and evolve in digital maturity to make it a competitive advantage over peers.

ABOUT THE ANALYSTS

Jebin George, Senior Manager, Software, Cloud, and Industry Transformation, IDC

Jebin George leads IDC's software, cloud, and industry-specific research across the Middle East, Turkey, and Africa (META). In this role, he works closely with technology and country analysts to understand industry-specific digital transformation trends, analyze technology spending patterns, and advise end users and technology suppliers. Jebin has over 12 years of experience conducting technology-related market research across the META region.

Nitesh Rathi, Senior Research Analyst, Software & Cloud, IDC

Nitesh Rathi is a senior research analyst for software and public cloud services research and consulting activities in the Middle East, Turkey, and Africa. In this role, he interacts with vendors, CIOs, and IT decision-makers and provides insights on market dynamics, key technology trends, end-user preferences and priorities, and vendor strategies.