BAIN RETAIL HOLIDAY NEWSLETTER

HOLIDAY HELP WANTED: STAFFING UP IN A TIGHT JOB MARKET

By Aaron Cheris, Darrell Rigby and Suzanne Tager

Online retail sales so far in November are up almost 20% from a year earlier, and store sales grew 3.8% in October. Rising sales are placing pressure on a key holiday ingredient: seasonal labor. In this issue, we recap sales results from Thanksgiving weekend and discuss how retailers are tapping innovative strategies to attract, train, retain and pay their people —one of their largest investments—and how they are using technology to make their existing labor pool more efficient this holiday season and beyond.

Holiday Halftime Report

As Christmas approaches, retailers have reason to cheer. Following a strong October, early estimates suggest that consumers purchased in full force during Thanksgiving weekend. While the data from the weekend is still being tallied, here is what we know so far:
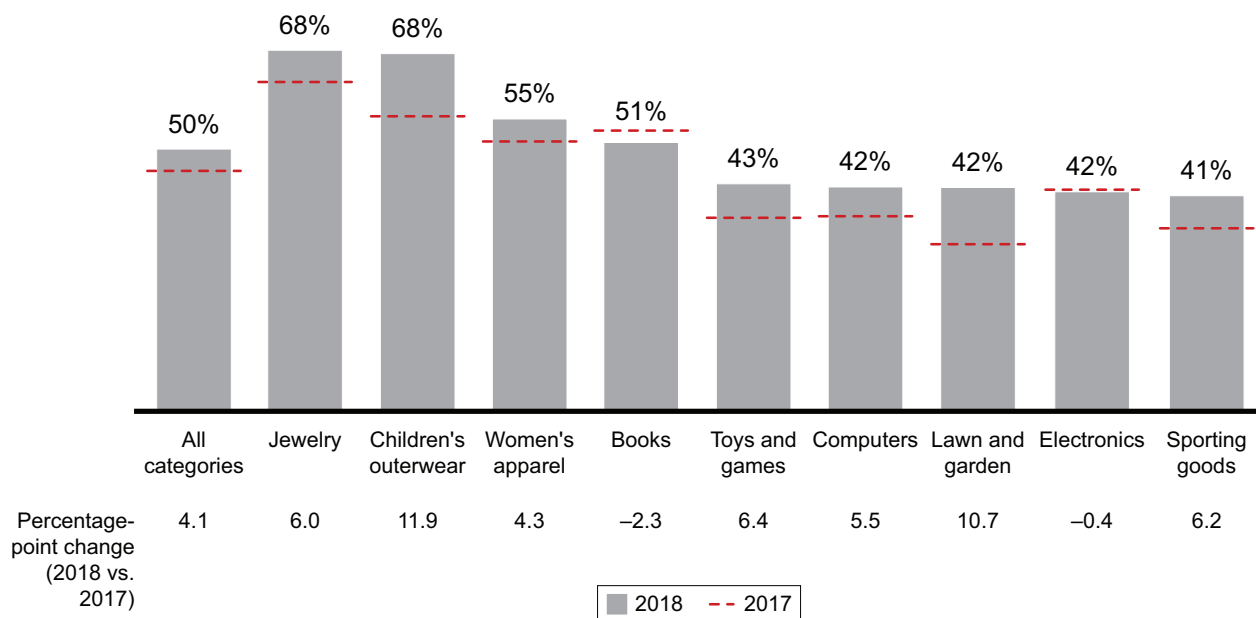
Retailers entered the holiday rush with momentum. Advanced retail in-store sales rose an estimated 3.8% in October from a year earlier, while e-commerce sales grew 17.5%. Online sales have climbed 19.9% so far in November, helped by robust demand during Thanksgiving weekend. Sales through desktop and mobile websites from Thanksgiving to Cyber Monday totaled $24.2 billion, up 23% from the year-earlier period, according to Adobe Analytics estimates. Cyber Monday sales alone rose an estimated 19.7% to $7.9 billion.

Thanksgiving weekend discounts were slightly higher than last year. Retailers slashed the prices of items they promoted in circulars by an average 50% on Black Friday, compared with 46% last year, according to research we conducted with Numerator. Together, we analyzed Black Friday promotions across a variety of product categories and found that retailers discounted children's outerwear and lawn and garden supplies the most compared with last year *(see Figure 1)*. In the hotly contested toys category, retailers boosted discounts to 43% from 37% last year in the hopes of winning former Toys 'R' Us shoppers. This trend was not universal: Discounts on electronics, a popular holiday gift category, were largely unchanged.

Foot traffic increased modestly. Average daily foot traffic for the first 25 days of November is up 2% from a year earlier at the 900 shopping centers, outlets and malls that we tracked with the help of Placer. ai. Most of this growth occurred in A- and B-grade malls—shopping centers with higher-end stores— where foot traffic increased 3% compared with last year. Traffic at C- and D-grade malls declined 1% during this period.[1]

Retailers are innovating with experiences. Many retailers are experimenting with unique in-store experiences and amenities to make shopping more fun and convenient. For example, the new FAO Schwarz megastore in New York features magic shows and a "baby doll adoption center," in addition to its famous dance-on piano. To reduce the hassle of navigating a crowded lot, the Mall of America in Bloomington, Minnesota, recently introduced a parking system that uses colored lights to guide

Figure 1: Retailers offered larger Thanksgiving weekend discounts this year than last year

	All categories	Jewelry	Children's outerwear	Women's apparel	Books	Toys and games	Computers	Lawn and garden	Electronics	Sporting goods
2018	50%	68%	68%	55%	51%	43%	42%	42%	42%	41%
Percentage-point change (2018 vs. 2017)	4.1	6.0	11.9	4.3	−2.3	6.4	5.5	10.7	−0.4	6.2

2018 ▬ − − 2017

Notes: Discounts reflect reductions from list prices; analysis includes 11 major retailers; "all categories" includes those shown above, plus stationery, entertainment, kitchen, bath, housewares, cameras, appliances, hardware, footwear, apparel, outerwear, furniture and cosmetics
Source: Numerator

shoppers to open parking spots. While it is too early to tell if these particular experiments are working, we expect to see more customer experience innovation.

Top apps are gaining share. From Thanksgiving to Cyber Monday, total daily users of the 50 most-popular Android shopping apps rose 19% from the year-earlier period, and shoppers spent twice as much time on them, according to research we conducted with SimilarWeb. Mobile app use also outpaced visits to top retailers' desktop and mobile websites, which climbed 2% and 10%, respectively, during the same period *(see Figure 2)*. The gains have been limited to only a few retailers, with the top four apps—Amazon, eBay, the bargain marketplace app Wish and Walmart—capturing 80% of the growth *(see Figure 3)*.
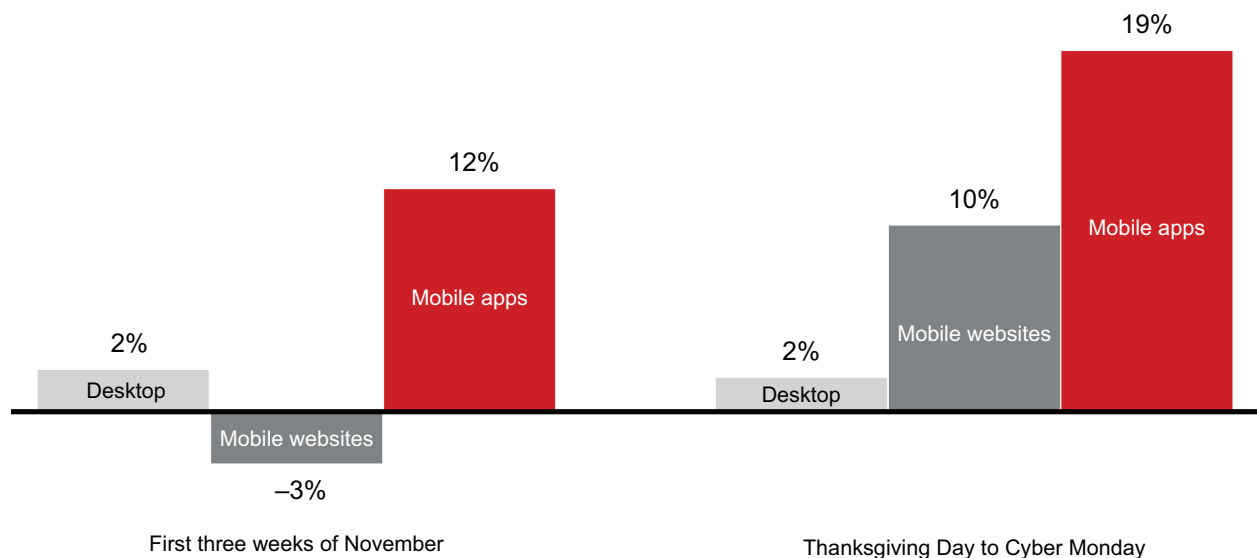
The outlook for the rest of the season remains strong. The robust sales growth we have seen in October and for the holiday season so far is likely to continue, given the strong macroeconomic environment. The recent California fires are likely to boost December sales as people rebuild homes and replace possessions.

Holiday shopping magic requires more hands

During the crucial holiday months, navigating the tightest job market in two generations will be essential to meeting retailers' profit goals. Last month, the National Retail Federation said it expected retailers to hire 585,000 to 650,000 workers for the holiday season, up to 12% more than last year,

Figure 2: More consumers used mobile apps to shop this year, especially during Thanksgiving weekend

Change in daily traffic from 2017 to 2018

First three weeks of November
- Desktop 2%
- Mobile websites −3%
- Mobile apps 12%

Thanksgiving Day to Cyber Monday
- Desktop 2%
- Mobile websites 10%
- Mobile apps 19%

Notes: Numbers reflect daily page views for desktop and mobile websites and daily active app users of the 50 most-popular retailers in each channel as of November 2018; app data reflects only Android smartphone and tablet users; mobile website traffic includes Apple and Android users
Source: SimilarWeb

Figure 3: Four apps accounted for most of the increase in mobile shopping during Thanksgiving weekend

Daily active app users

Average daily active app users from Thanksgiving Day to Cyber Monday
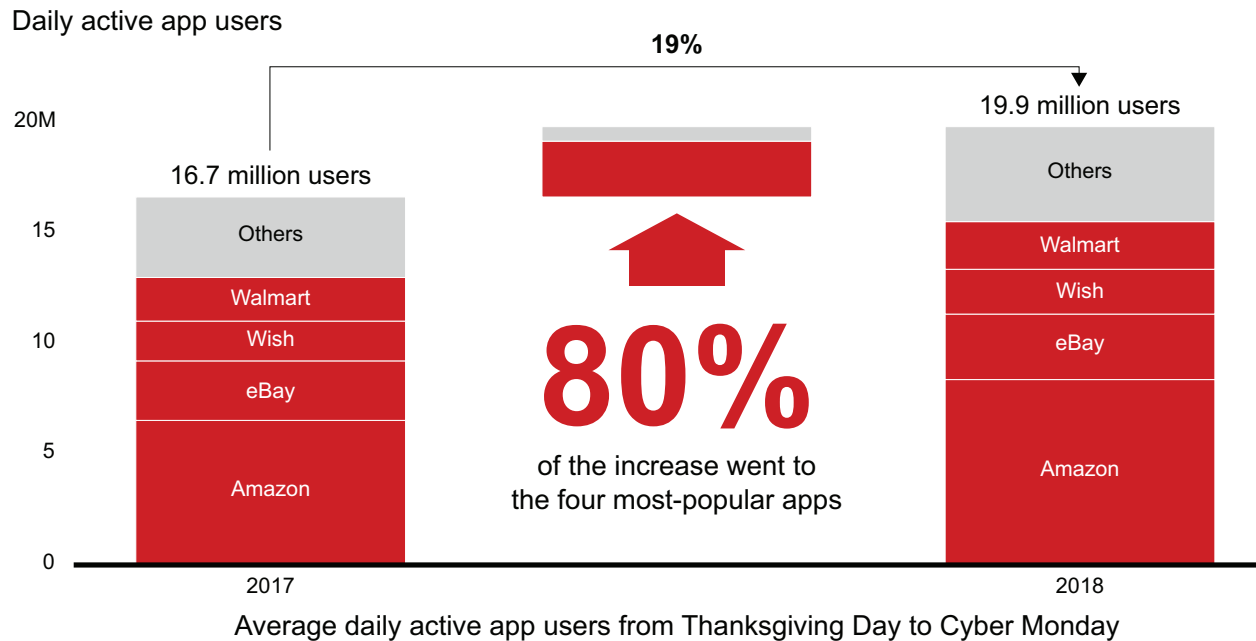
Note: Includes the 50 most-popular retailer apps for Android phones, based on daily active users for November 2018
Sources: SimilarWeb; Bain analysis

when one-quarter of retailers fell short of their hiring goals. Target said it aimed to hire more than 125,000 people for the holidays, 20% more than in 2017, and Nordstrom sought to add 75% more seasonal workers. Companies including Kohl's and J.C. Penney started hiring for the holidays as early as June and July.

Without adequate staffing, companies risk attracting new customers only to disappoint them during the holiday rush with long checkout lines, empty shelves and insufficient coverage on the sales floor. With unemployment at a 49-year low of 3.7% in October and ride-sharing companies Uber and Lyft drawing more people to drive for extra cash, seasonal workers are harder to find and cost more to hire. If companies do not manage rising wages effectively, labor costs as a percentage of revenue could increase by 4 to 6 percentage points, and—absent other changes—wipe out the single-digit operating margins typical in the industry.

An uphill battle for talent

Store labor makes up about half of a retailer's selling, general and administrative expenses, and many retailers prioritize managing costs over employee effectiveness and loyalty. Fifty percent of retail salespeople in the US earn less than $11.16 per hour, and one-third work part time. Beyond low pay, part-time employees also cite unpredictable schedules and weak management as common frustrations, based on

Figure 4: Retail employees are less satisfied than workers in other service industries

On a scale of 1–5, how satisfied are you with your work?

3.9	3.8	3.5	3.4	3.3	2.8
Ride sharing	Hospitality	Delivery	Food services	Retail	Call centers
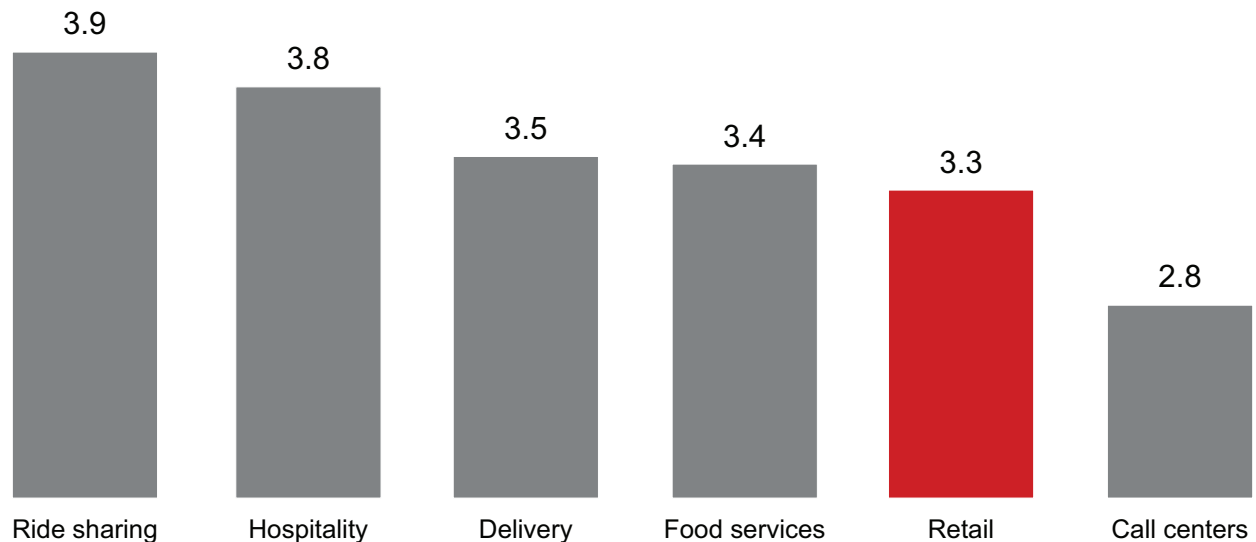
Notes: Includes reviews from 2014 to present; with 5 meaning "very satisfied"; gig labor ratings are based on reviews by workers with the generic "employee" title, excluding those in San Francisco who might be corporate employees; all other ratings are based on part-time workers.
Source: Glassdoor

Glassdoor reviews of industries that tend to hire the most seasonal help. Those factors have pushed turnover rates for part-time hourly store workers to 81% this year from 76% last year. When it comes to employee satisfaction, retail lags ride sharing, hospitality and delivery services *(see Figure 4)*.

The talent war has forced many retailers to increase pay rates to compete. Retail wages have grown 2.3% annually over the last five years, outpacing inflation by 80 basis points. After the US government cut corporate tax rates, Walmart and Target boosted their hourly base wages to $11 and $12, from $10 and $11, respectively. Amazon made the biggest waves when it raised its hourly minimum to $15, effective November 1 (see Exhibit A). Target plans to reach the same mark by 2020.

Beyond higher wages, retailers have been offering more—and more creative—incentives to prospective employees this year, including:

- **Richer bonuses or vacation packages.** Macy's made seasonal workers eligible for quarterly bonuses for the first time. J.C. Penney offered one week of paid time off to some seasonal workers.

- **Better employee discounts.** J.C. Penney made seasonal workers eligible for its 25% employee discount for the first time. Kohl's advertised a 35% discount on select days to seasonal workers this holiday, on top of its 15% everyday discount offering.

- **Unique perks.** Ulta has been offering half-price haircuts, while Kohl's provided turkey dinners to employees who worked on Thanksgiving Day. J.C. Penney raffled off everything from kayaks and diamond necklaces to all-expenses-paid vacations to destinations across North America.

Win with people, win with customers

Despite improvements in technology and the growth of e-commerce, people are still paramount to retail success. Employees build relationships with customers—providing a human touch that is hard to replace. A survey from Aspect Software found that 50% of UK shoppers prefer to interact with humans alongside technology when shopping in a store. Of course, human interaction requires the right humans; miserable employees can detract from an otherwise positive customer experience.

Providing the memorable experiences that customers will rave about on social media and to their friends demands engaged, even inspired, employees. After all, employees should be a company's best advocates. Their enthusiasm rubs off on customers, encouraging them to come back and buy more. Return customers propel a company's growth and reward employees for their efforts, creating a virtuous cycle *(see Figure 5)*.

Customers who interact with highly engaged employees are up to 2.6 times more likely to recommend the company, according to a Bain survey. And companies with leading customer advocacy scores grow more than 2.5 times faster than the industry average. Conversely, poor in-store support hurts customer

Figure 5: Employee and customer advocacy fuel a virtuous growth cycle

Growth, opportunity and inspiration

Growth inspires and provides opportunities for employees

Customer advocacy

Loyal customers spur sustained growth

Profitable, sustainable organic growth

Employee advocacy

Inspired employees cultivate a superior customer experience

Source: Bain analysis

satisfaction and lowers sales, which might prompt a company to cut labor hours or training and further undermine its customer experience. This doom loop is hard to escape.

Successful retailers go beyond meeting their workers' basic needs and inspire them to apply their energy, enthusiasm and creativity to delighting customers (see Exhibit B). Inspired employees are more likely to create memorable customer experiences and less likely to quit, reducing costly turnover and creating more value for customers and shareholders. The convenience store QuikTrip not only provides detailed feedback on employee and store performance, it encourages staff to find creative ways make customers happy, according to Massachusetts Institute of Technology professor Zeynep Ton, author of "The Good Jobs Strategy." The result is a highly motivated workforce that feels empowered to improve the QuikTrip experience. QuikTrip's voluntary employee turnover rate is less than 15%, significantly lower than the retail average of 60%.

Before a company can inspire its employees, it must meet their basic needs for safety, growth opportunities and fair pay, among others. That might sound obvious, but retailers have a lot to gain. Failing to meet employees' basic needs can increase employee stress and turnover, according to the Good Jobs Institute at the Massachusetts Institute of Technology. The opposite is also true. Consider Costco, whose average hourly wage of $22.50 outstrips the $18.50 average for all retailers. The wholesale retailer also offers store employees subsidized health and dental insurance, and access to its retirement savings programs. The approach has satisfied employees and investors alike, with a Glassdoor rating that is 20% higher than those of peers and a return that has doubled the S&P 500 Index during the last five years.

Automating Santa's workshop

Higher wages and benefits win raves from workers' rights organizations, but those headlines usually tell only part of the story. For Amazon in particular, the increase strengthens one of the retail giant's competitive advantages: its use of technology. Amazon, which also eliminated bonuses and company stock for existing warehouse workers, is betting that it can automate faster than its competitors. The company has expanded its use of robots in fulfillment centers by 25% since last year. It is also increasingly using "machine-driven merchandising," ordering products automatically based on how fast they sell, vendor compliance metrics and other factors.

Will other retailers be able to keep pace? To maintain their margins, retailers must reduce nonlabor costs, cut labor hours or boost sales by making their remaining workforce more effective. This holiday, we see many retailers turning to technology to help find and train employees, automate store operations, and improve warehouse and delivery logistics.

Solutions to find and train employees

Gig platforms expand talent pools. Retailers are beginning to embrace the gig economy to hire workers almost instantly to complete discrete tasks. The startup Jyve connects retailers with

on-demand workers who can perform in-store tasks on short notice. Supervisors can track "Jyvers" progress in real-time from their computers or mobile devices, so they can learn about completed tasks faster and manage workflows better. While not all gig workers are suited for higher-end service tasks, retailers can use Jyve's productivity data to stay connected with top per-formers and add them to their longer- term hiring pipelines. The Snag Work app offers open store shifts to more than 2 million active users. A similar app, Wonolo, acts as a temporary staffing service for companies such as apparel retailer Uniqlo and shipping company OnTrac.

Hiring apps simplify recruiting processes. Mobile hiring portals can increasingly screen résumés and manage interviews. Merlin, for example, handles everything from publishing listings to filtering candidates and scheduling interviews for retailers such as T.J. Maxx, Sherwin-Williams and The Vitamin Shoppe. Tools such as Paradox's Olivia or Google's Hire app use artificial intelligence to automate aspects of the hiring process. Retailers such as CVS and Staples use Paradox's Olivia to screen candidates automatically, schedule interviews and even field questions about the job, helping recruiters find better candidates faster.

Virtual reality enhances training. Retailers are using simulations to better prepare employees for real- life situations. In September, Walmart announced it would use virtual reality techniques to train employees in its more than 4,700 stores. Through a 2017 pilot with the startup STRIVR, the retailer used virtual reality to simulate a Black Friday experience for trainees, helping them to pre-pare for the day's chaos. Lowe's is also using virtual reality to teach associates how to use in-store equipment, in the hopes of improving customer service.

Automating store operations

Digital price tags offer flexibility with less manual effort. Printed price tags historically made it impractical and costly to change prices frequently. French grocers wrestling with rising employee wages shifted years ago from printed price tags to digital displays, cutting the high labor costs of changing product prices. With technology prices falling and wage rates rising, this approach is beginning to take hold in the US as well. Best Buy has spent $30 million to roll out digital price tags at 20% of its stores. The technology can save the company as much as $10 million of mer-chandising people costs in the first year.

Computer vision aids planogram compliance, shelf restocking and more. Close-range computer vision technology now outperforms human eyes and holds promise as a labor-saving solution for many manual activities. The computer vision company Trax uses image-capturing technology to create digital store aisles, helping retailers audit their inventories and save valuable labor hours. Earlier this year, Alibaba unveiled its Futuremart store concept. At Futuremart, facial recognition cameras identify shoppers when they walk in. As they exit the store, the same cameras confirm their identity and RFID technology registers the items they have in hand. Facial recognition is also streamlining the payment process. Yum China recently expanded its "smile to pay" technology, which allows for payment through facial recognition software, to over 300 KFC stores across China.

Automating in-store pickup desks. While "buy online pick up in store" (BOPIS) options have become more popular, early renditions were often cumbersome and labor intensive. Consumers usually had to walk to the back of the store and wait for an employee to locate their items. To add convenience, retailers such as Walmart, Dick's Sporting Goods and Home Depot are using self-service or automation to expedite the pickup process. By the end of the year, Walmart will have more than 700 pickup towers, large "vending machines" that retrieve online orders. Walmart is also partnering with Alert Innovation's Alphabot technology to pilot robotic storage and retrieval to automate the order collection part of the process. Beyond in-store pickup for customers, integrating these technologies opens the door for Walmart to scale microwarehousing models over the long term.

Improving warehouse and delivery logistics

Robots increase speed. Retailers are further automating distribution centers and processing orders faster. Logistics company XPO, whose clients include Ikea and Zara, said in October that it would deploy 5,000 autonomous robots to help workers fulfill up to 48 orders at once, doubling the processing speed. Cainiao, a Chinese logistics company, opened a 700-robot warehouse to prepare for Alibaba's Singles Day shopping event on November 11. And Kroger plans to build 20 automated warehouses in the US to fill online grocery orders. The grocer struck an exclusive partnership with Ocado, which has significant experience with robotic customer fulfillment centers in the UK.

Autonomous vehicles automate last-mile delivery. Moving goods from a transportation hub to their final destination accounts for an estimated 50% of a retailer's total fulfillment costs. Within this so-called last-mile delivery, people are retailers' greatest expense. Several retailers are already experimenting with autonomous vehicles, including cars and drones, to cut delivery times. Kroger has been testing how autonomous vehicles might help it deliver same-day and next-day orders in Arizona through a partnership with the start-up Nuro. Domino's Pizza and 7-Eleven are working with Flirtey, which conducted the first drone delivery approved by the Federal Aviation Administration, to deliver food and drinks quickly, even during rush hour.

While these technologies offer great promise, they also present executives with difficult decisions. Does the expected benefit justify the significant capital expenditure? Can the organization handle the change management required? Will this version of the technology stick or will it be outdated in two years? Is it better to build or to buy? And while the possibilities are endless, wallets have limits. Despite the uncertainty, leading retailers will not sit on the sidelines. They will take a measured approach to testing, scaling ideas that work and learning from those that do not. A clear strategy and strong execution will improve the customer experience and employee service.

Evaluating your people and technology strategies

Many retailers will face difficult people and technology decisions not only over the holidays, but also during the coming years. While every company is different, we recommend starting with the following blueprint:

Understand why customers shop with you. Every retailer must know who their customers are, what they care about, how they engage across shopping journeys, the unique value proposition the retailer offers them, and how the company competes with its peers. This perspective helps retailers identify experiences that should be physical rather than digital, and when to be best in class versus best in cost.

Embrace people as a critical asset. Leading companies consider their employees their biggest investment and constantly look for ways to motivate and inspire them. Putting this into practice requires companies to create a strong employee culture, which does not happen overnight. Key questions for executives to ask include: What energizes our best employees? Why do people leave? How does our compensation compare with competitors'? What do our customers say about our employees? Are there low-cost ways to delight the workforce? Are there policies I should change to show my employees that I trust and value them?

Boost employee productivity and effectiveness. Many retailers have yet to unlock the full potential of their employees simply because people spend too much time on activities that customers do not value, or because they lack the tools to succeed. Opportunities to increase revenue or decrease costs often succumb to complex processes or inadequate technology. Solutions start with simplification. Zero-basing what your company does and how it does it can reveal processes that you can streamline, eliminate or automate.

Create a customer experience system. Successful companies never stop innovating customer experiences. They innovate the business processes that enable those experiences. And they innovate the tools and technologies that power the business processes that enable those experiences. They engage the entire organization in serving the customer. They listen and act on ideas, managing change to achieve results.

Looking forward: Future release dates and topics

In our next issue, we will examine the latest marketing trends and continue to monitor holiday sales figures. Here is the breakdown of our last two issues:

- **Issue No. 4 (mid-December):** Merry Marketing

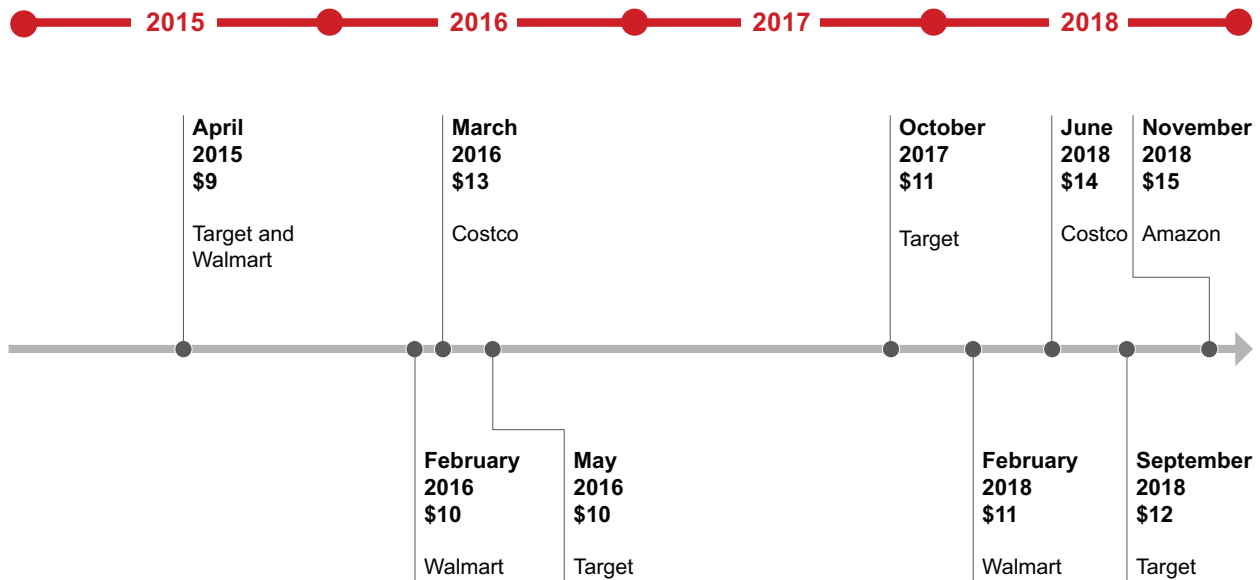- **Issue No. 5 (mid-January):** Postholiday Recap and 2019 Outlook

Please let us know if you have any questions or would like to arrange a follow-up discussion on topics addressed in this newsletter or any other retail topics by emailing us at *RetailHolidayNewsletter@bain.com*.

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1   Green Street Advisors determines mall grades for each property based on merchandise mix, productivity, location, and condition/appeal.

APPENDIX

Exhibit A: Amazon's raise to $15 an hour is the latest in a long string of retailers' minimum wage hikes

| 2015 | 2016 | 2017 | 2018 |

April 2015
$9

Target and Walmart

March 2016
$13

Costco

October 2017
$11

Target

June 2018
$14

Costco

November 2018
$15

Amazon

February 2016
$10

Walmart

May 2016
$10

Target

February 2018
$11

Walmart

September 2018
$12

Target

Sources: Press releases and news reports

Exhibit B: Successful retailers both satisfy and inspire their workforce

Value and support

Safe and accepting environment

Satisfaction

Inspiring leaders

Strong affiliation with team and company

Clear company mission

Inspiration

Job that fits skills and aspirations

Personal growth opportunities

Fair pay and promotions

Clear, reasonable expectations

Autonomy

Source: Bain analysis

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