

Overview: Research

Retail Sector

Retail Association

2018



Client need

An association of stakeholders in the retail sector required research on the future of work and the skills required to sustain employment in the retail sector.

The scope was South Africa with a 2035 time horizon.

Aspects to be addressed:

- Drivers of change in the sector (what could retail look like in 2035)
- Future jobs (and the current ones at risk)
- Important skills for future retail people
- Scenarios highlighting the driving factors and the possible influence of business, government and labour strategies

Design

Desktop Research

Interview with
key stakeholders

Inputs from IFR
research colloquium

First Report

Johannesburg think
day workshop

Cape Town think
day workshop

Further Research

Final Report

Brief overview of first report

Issues pertaining to the **RETAILER**

- Channel architecture
- Store format landscape
- The store continuum
- The complete shopping experience
- Challenges for the future

Issues pertaining to **TECHNOLOGY**

- E-Commerce in South Africa
- Omni-channel retailing
- Technology and retail
- The digital commerce hype cycle

Issue pertaining to the **CONSUMER**

- Demographic indicators
- Economic drivers
- Who/what influences buying decisions?
- The mindset of the consumer

EMERGING GAME CHANGERS

Brief overview of final report

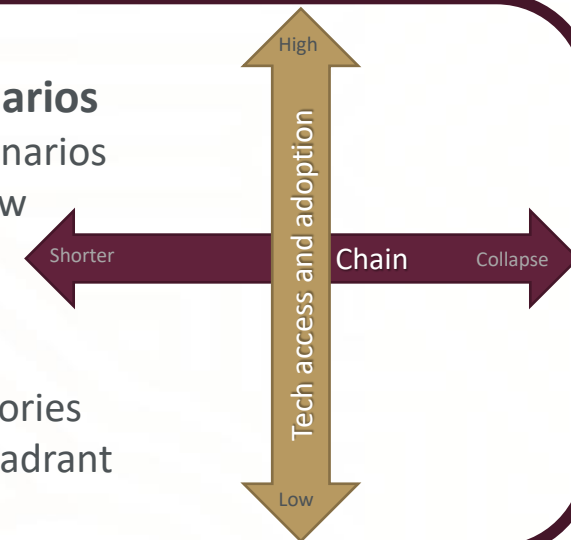
Key factors to influence retail toward 2035

- 7 Factors were identified through the research
- Description of each factor, its current status and possible development path
- Analysis of the influence that each of the 7 factors will have upon each other

2035 scenarios

Set of 4 scenarios (view of how factors will develop)

Plausible stories for each quadrant



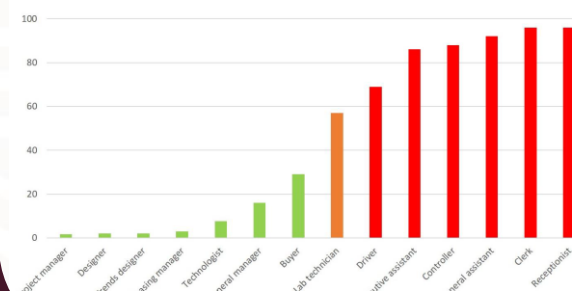
Next jobs and skills for the sector

- Analysis of skills required
- List of emerging job titles

Influence of digitization on existing retail jobs

Graphics illustrating digitisation potential

Planning, design and buying



Tech trends to what

- Examples from international retailers
- Future game-changing technologies and innovations for retailers in South Africa