



**2022 Retail Technology
Report: An Analysis of
Trends, Buying Behaviors,
and Future Opportunities**

Zipline



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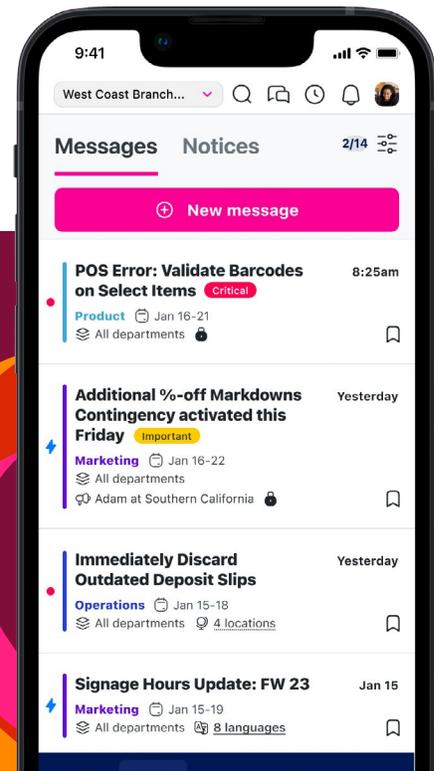
A feedback loop in Zipline enables those closest to customers to share what's working, and where there's room for improvement.

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When your stores execute to brand standards, basket size increases, driving better business results across the brand.



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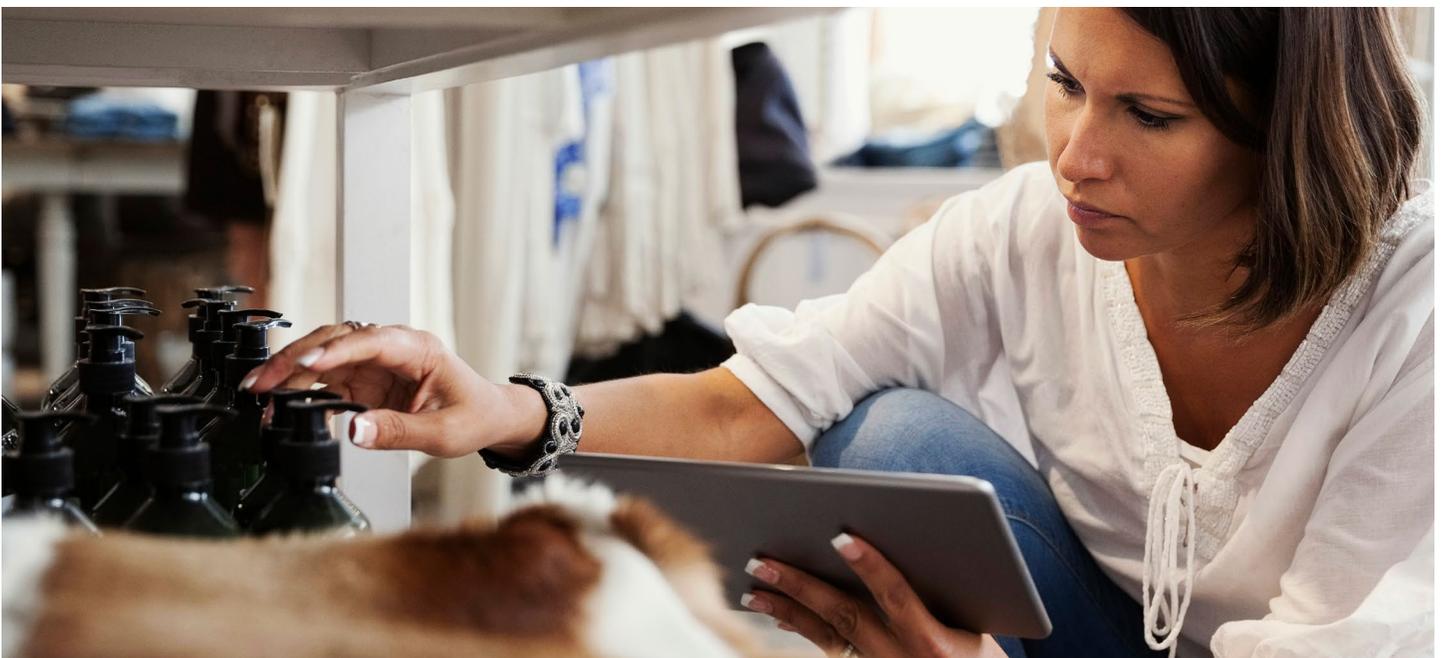
2022 Retail Technology Report: An Analysis of Trends, Buying Behaviors, and Future Opportunities

EXECUTIVE SUMMARY

The past two years have seen drastic shifts in consumer behavior, which in turn have forced retailers to re-evaluate (and speed up) their technology road maps. Consumers' increasing reliance on digital and omnichannel solutions to engage and transact with retailers has presented a sea change for the industry — or at least accelerated that pace of change. Case in point: [According to McKinsey](#), the retail industry saw 10 years worth of forecasted e-commerce growth in just three months.

Furthermore, innovative technology systems and solutions are being developed, implemented and optimized across retailers' organizations. This extends to all facets of their businesses, from consumer-facing brick-and-mortar stores and digital properties, to back-end systems and solutions that are powering marketing, supply chain, customer service, among other functions. In fact, many retailers are now frequently identifying themselves as technology companies first, merchants second.

With that dynamic in mind, Total Retail surveyed its audience of retail executives to get a better understanding of their current usage of technology; future technology plans, including budget adjustments; and the processes within their organizations for vetting and purchasing technology from third-party solution providers. A total of 108 respondents took the online survey, which was conducted in February 2022 and March 2022. The respondents were from a mix of retail organizations (omnichannel, brick-and-mortar- and online-only), as well as CPG and wholesale brands. The sizes of those companies ranged in annual revenue from enterprise (\$1 billion or greater) to small (less than \$1 million).

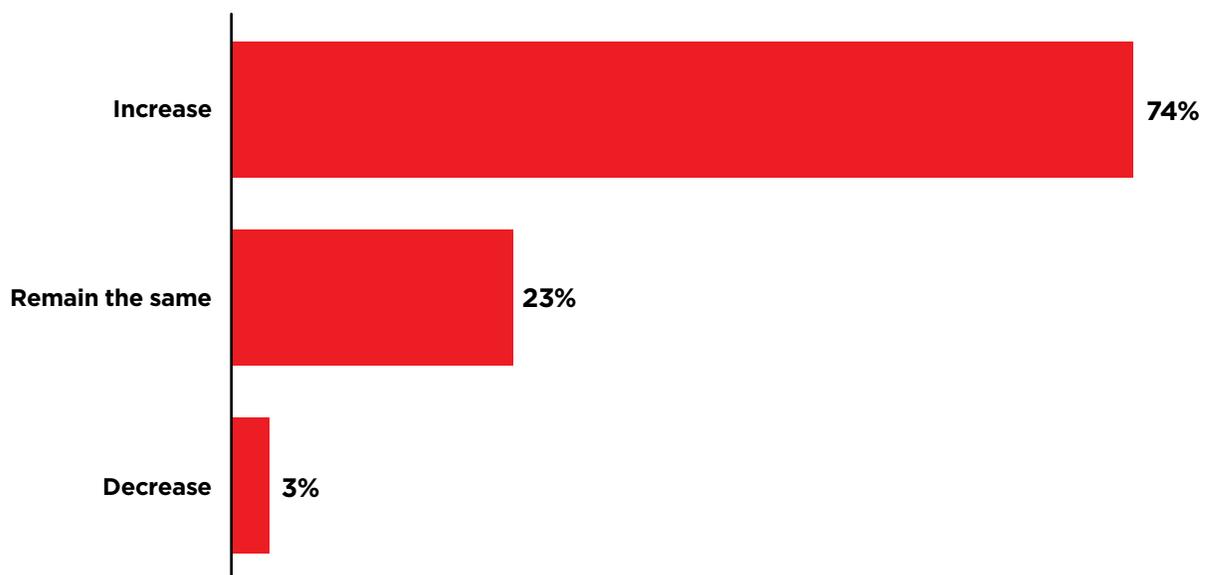


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Here are some of the highlights from the data collected:

- **Retailers are currently prioritizing investments to manage one of their most valuable assets, their inventory.** Inventory management software received the most votes (63 percent) when respondents were asked to choose the technology systems, tools and channels their company is currently using. This technology is also critical for enabling the cross-channel experiences that consumers are increasingly adopting, such as buy online, pick up in-store (BOPIS) and ship-from-store. .
- **Increased spending on technology will be nearly table stakes for retailers looking to keep pace with their competitors.** Nearly three-quarters of respondents (74 percent) indicated that their company's overall spending on technology will be increasing in the next 12 months.

Tech Spending on the Rise



Q: Will your company's overall spending on technology increase, decrease, or remain the same in the next 12 months?
n=108

TotalRetail
NAPCO RESEARCH

- **Automated technology solutions are in demand by merchants.** As they seek to remove friction, speed up, and simplify their processes, both internal and external (i.e., customer facing), retailers are turning to automated tech systems. Sixty-one percent of respondents are planning to increase spending on automation in the next year.
- **The physical store remains a critical part of retailers' future plans — aided by the implementation of technology.** From back-end systems (e.g., point of sale, inventory management, employee scheduling) to front-facing solutions (e.g., augmented reality, contactless checkout, RFID), technology is transforming the in-store shopping experience. To help prepare their front-line staff for this new environment, retailers are targeting investments in training technology.

■ **The integration of new technology solutions with existing systems is a primary focus for retailers.** When asked what factors are of most importance when making a technology investment decision, integration with existing systems was the second-most cited answer. This makes sense considering that respondents selected “integrating with existing technology” as their top challenge when integrating a new technology into their business.

Total Retail’s 2022 Retail Technology Report, which was produced in conjunction with Zipline, a field enablement platform that makes it easier for employees to do their jobs, contains the data collected from our survey as well as analysis into what it means for the industry. Retailers can use this report as a benchmarking tool to compare how their technology investments stack up vs. the rest of the industry, and perhaps identify where they might want to make adjustments based on future growth opportunities.

Furthermore, the data on retail organizations’ tech buying processes offers technology service providers valuable insight into how businesses are making budget decisions in a rapidly evolving environment. This information can be used to hone sales pitches in an effort to better serve and retain existing clients as well as acquire new ones.

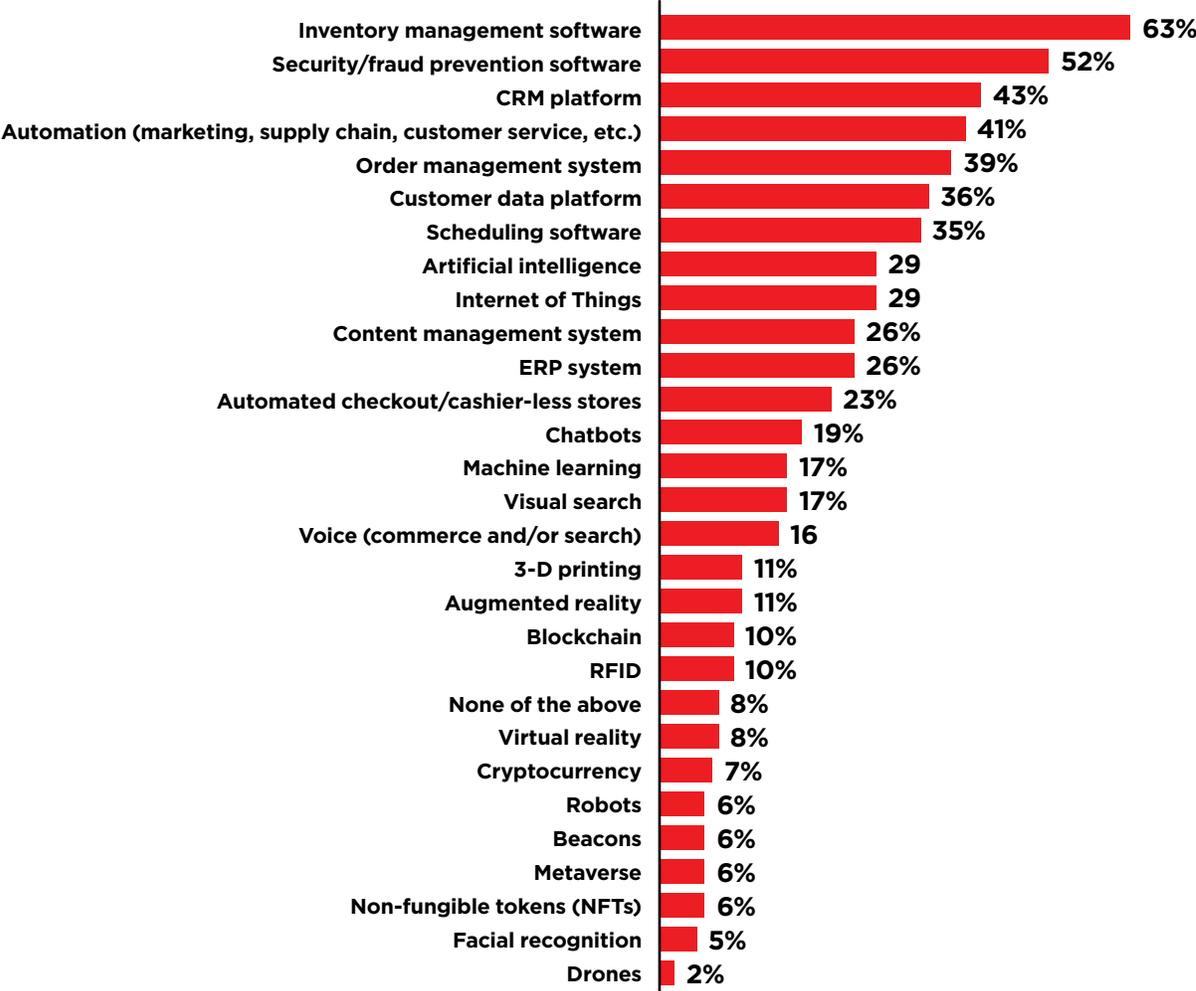


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SURVEY DATA AND ANALYSIS

The Tech Retailers Are Using



Q: Which technology systems, tools and channels is your company currently using?
 (Check all that apply.)
 n=108



The above chart provides a view into the technologies that retailers are currently using (i.e., allocating budget to). The technologies reflect the omnichannel nature of today’s retail organizations. Systems that can help retailers transparently manage inventory and fulfill orders across multiple channels are becoming more critical as consumers engage with brands across a variety of touchpoints, often in a single purchase journey. The data reflects that trend, with inventory and order management systems among the most popular choices.



For traditional brick-and-mortar retailers looking to fend off the growing threat of online pure-plays and brands selling direct to consumer (D-to-C), leveraging their stores as distribution hubs for e-commerce orders has become an effective strategy for many. In order to do that effectively, however, investments in supply chain technology are needed. Inventory and order management systems help enable retailers' BOPIS; buy online, return in-store (BORIS); and ship-from-store programs, ensuring the right inventory is in the right place at the right time, enabling frictionless and speedy fulfillment of orders.

This chart is also showing us the importance retailers are placing in not only collecting customer data, but having technology systems in place that allow them to take action based upon what that data is telling them. CRM platforms and customer data platforms are two of the six most selected technologies. Retailers understand that consumers now expect personalized shopping experiences, from product discovery through to post-purchase support. Data segmented down to the individual customer is what enables those types of personalized experiences.



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AI, Automation, Metaverse Drive Tech Spending Increases

	INCREASE	DECREASE	REMAIN THE SAME	I DON'T KNOW
Cryptocurrency	88%	13%	0%	0%
Machine learning	83%	0%	17%	0%
Automated checkout/cashier-less stores	72%	0%	28%	0%
Artificial intelligence	71%	3%	23%	3%
Metaverse	67%	17%	0%	17%
Non-fungible tokens (NFTs)	67%	0%	33%	0%
Blockchain	64%	0%	27%	9%
RFID	64%	9%	18%	9%
Automation (marketing, supply chain, customer service, etc.)	61%	2%	32%	5%
Internet of Things	61%	3%	32%	3%
Content management system	61%	0%	39%	0%
Facial recognition	60%	0%	40%	0%
Augmented reality	58%	8%	33%	0%
Robots	57%	0%	43%	0%
Virtual reality	56%	22%	22%	0%
Security/fraud prevention software	55%	2%	34%	9%
CRM platform	54%	2%	35%	9%
Drones	50%	0%	50%	0%
ERP system	50%	0%	43%	7%
Visual search	50%	6%	44%	0%
Customer data platform	46%	5%	41%	8%
Inventory management software	43%	0%	47%	10%
Order management system	40%	0%	55%	5%
Voice (commerce and/or search)	35%	0%	59%	6%
Beacons	33%	0%	50%	17%
Chatbots	33%	5%	43%	19%
Scheduling software	29%	0%	63%	8%
3-D printing	25%	0%	75%	0%

*Q: For each of the technologies listed below, indicate whether your spending will increase, decrease or remain the same in the next 12 months.
n=108*

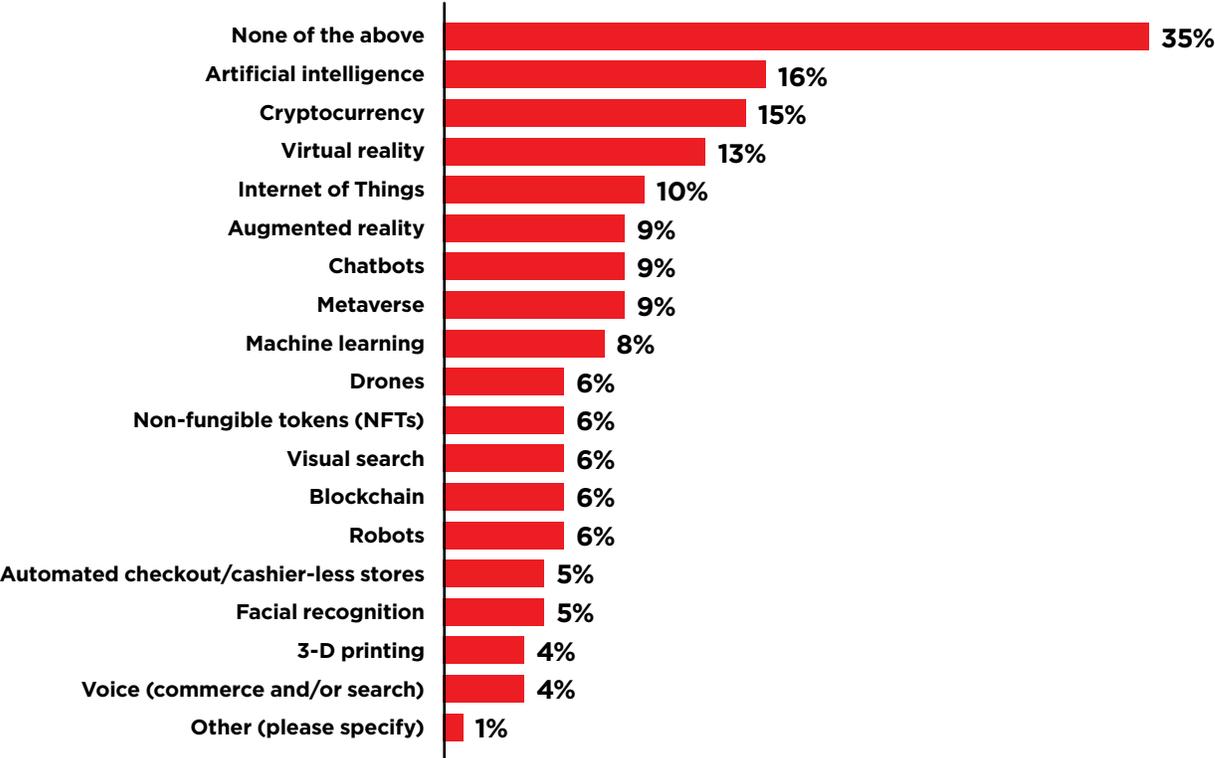
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NAPCORESEARCH

Emerging technologies such as cryptocurrency, AI and machine learning (ML), automated checkout, and the metaverse have captured retailers' attention. In fact, they're willing to invest more into these nascent technologies to better understand how they can benefit their businesses. With regards to cryptocurrency and automated checkout, innovations in payments have allowed retailers to give shoppers more options when choosing how to pay for goods and services. This payment flexibility in turn leads to higher conversion rates, which drives up revenues. This applies both online and offline.

Looking at the closely related but different technologies of AI and ML, the expected increase in spending speaks to the value retailers place in these tools. AI and ML offer multiple benefits across retail organizations, including but not limited to product forecasting, personalized marketing, optimized pricing, expedited supply chains, comprehensive customer care, stringent fraud protection, among others. AI and ML allow retail organizations to analyze and take action based upon massive datasets quickly and easily, leading to smarter decision making. These tools are complementing data scientists and data engineers, not replacing them.

Lastly, the metaverse is still uncharted (virtual) territory for most retailers and brands, but it certainly has piqued their interest. This includes non-fungible tokens (NFTs), which retailers have targeted as virtual products they can market and sell. While albeit starting from a lower baseline than other technologies that have been in the market for longer, it's telling that both the metaverse and NFTs, which are very much connected, are viewed as growth opportunities based on spending forecasts.

Wait-and-See Approach to New Tech



Q: Which of the following technologies are you NOT currently investing in but planning to invest in within the next 12 months. Please select up to three.
n=108



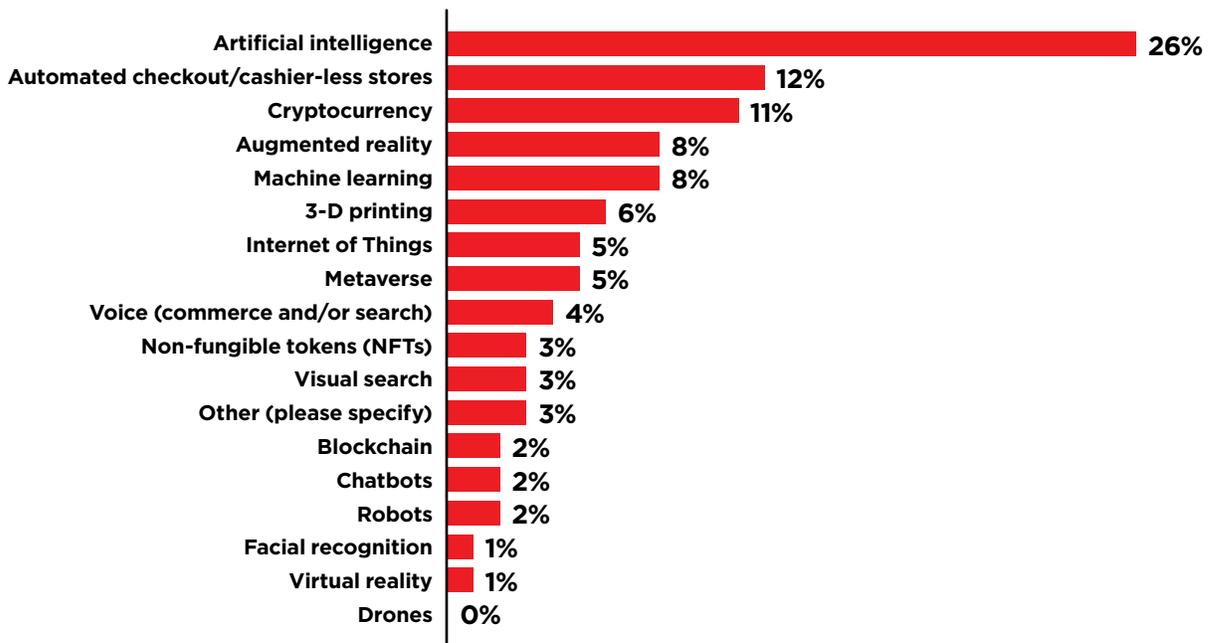
When asked to identify up to three emerging technologies that they're not currently investing in but plan to do so in the next 12 months, the respondents' top choice was telling. Thirty-five respondents won't be allocating budget to any of the emerging technologies listed in the chart above. The question is whether that's an indictment of their lack of confidence in the technologies to positively impact their businesses or just a sign that they have limited funds to spend on new technology — or perhaps both.



It appears many retailers are taking a wait-and-see approach before committing money to some of the buzzed about but relatively ROI unproven (to this point) technologies in the market today. While a prudent strategy can be wise, it doesn't offer the same opportunity to capture significant market share and brand awareness in a category (e.g., metaverse, virtual and augmented reality, cryptocurrency, etc.) by being an early adopter.

However, if there is one emerging technology that retailers are bullish on it's AI. More than a quarter (26 percent) of respondents identified AI as the emerging technology that they believe will have the biggest impact on the industry in the next year.

Retailers Betting on AI's Impact



Q: Thinking about the retail industry as a whole, which emerging technology do you believe will have the biggest impact within the next 12 months?
n=108

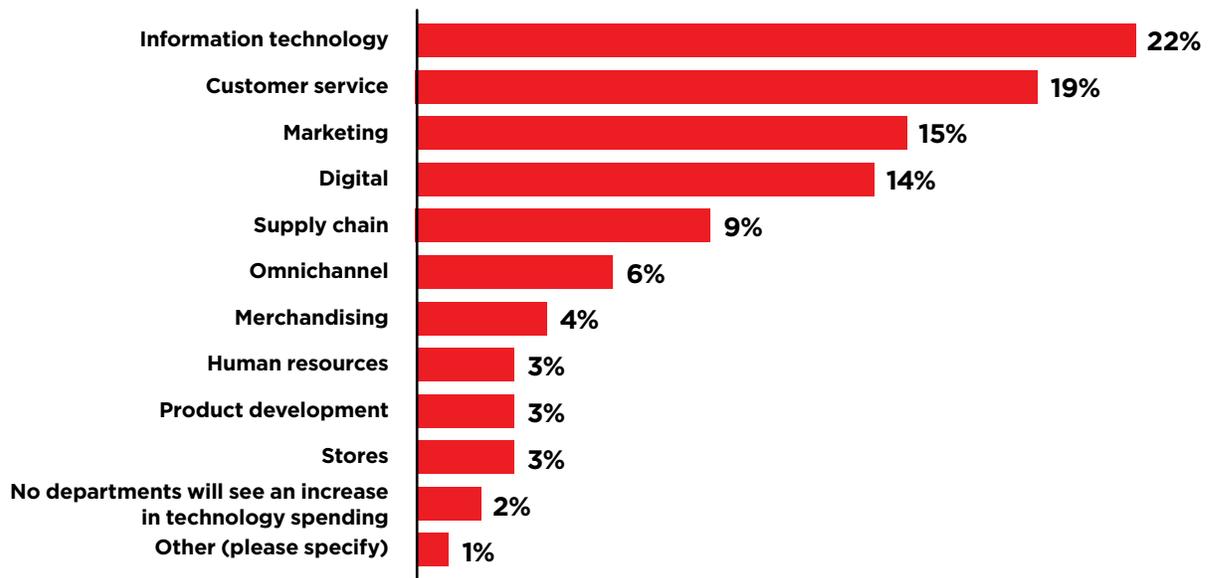
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NAPCO RESEARCH

Here are some comments from the respondents on why they believe AI will be the emerging technology to have the biggest impact on the retail industry in the next 12 months:

- Artificial intelligence is going to have a great impact on retail because it will allow automation of needs according to the needs of customers or businesses.
- With the plethora of data, being able to use it smarter will be a key to being more efficient and relevant to customers.
- As we lose tracking [from cookies], there is a need to do more data modeling with zero- and first-party data.

For the third consecutive year, AI was the top choice among retailers as the emerging tech most likely to have the biggest impact on their businesses. With that in mind, the use of AI in at least some aspect of running a retail business has become table stakes.

IT to See Their Budgets Grow



Q: Within the next 12 months, which department within your organization will see the biggest percentage INCREASE in technology spending?
n=108

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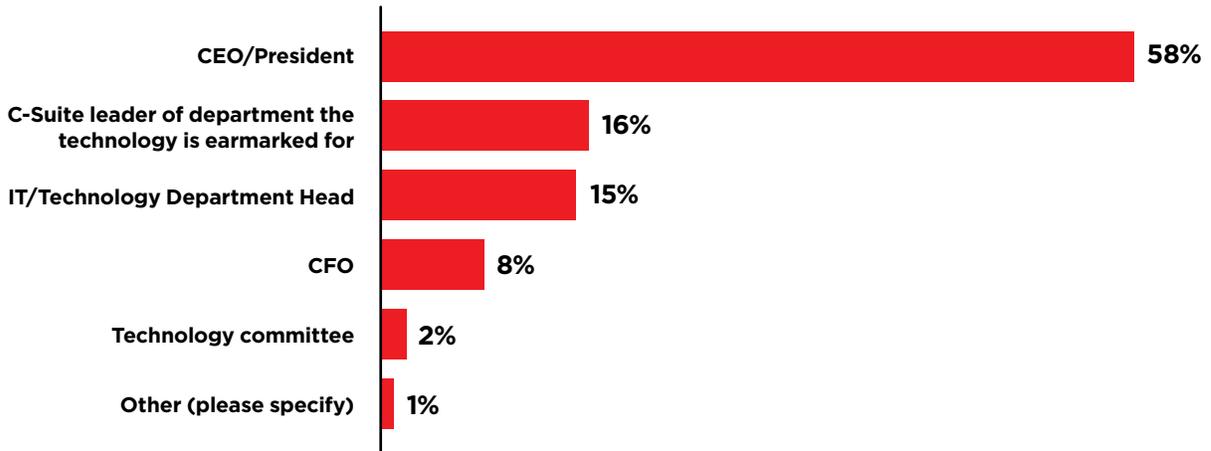
Information technology (IT) departments will see the biggest increase to their technology budgets in the next 12 months. With the rapid shift we've seen in consumer behavior, supply chain disruptions, and labor shortages, retail organizations are looking to technology solutions to help them better serve their customers as well as more cost efficiently operate their businesses. To aid in that mission, retailers are planning to bolster their technology decision makers — IT leaders and departments — with larger budgets.

Interestingly, the department in line to see the second biggest percentage increase in technology spending is customer service. With digital cost of acquisition (CAC) continuing to rise, retailers seem intent on finding ways to retain their existing customers. And first-rate customer service, aided by technology such as AI, is critical to winning hard-fought customer loyalty. This level of service is made possible by well-informed, knowledgeable employees across all channels (stores, call centers, online), who are aided by in-depth, 360-degree customer profiles. Front-line employees assist throughout each stage of the purchase journey. They represent the face of a brand and are integral to creating the long-term customer relationships that retailers covet.

Conversely, the department slated to see the biggest cut in technology budget this year is stores. Nine percent of respondents plan to cut technology on their brick-and-mortar stores spending during the next 12 months. However, this data point could be misleading. Just because tech spend won't be coming out of the stores org doesn't mean stores won't be impacted. In fact, it's the opposite — stores will need the most change management out of all departments to deal with the knock-down effects of this increased spend in other departments. After all, even during a global pandemic, [more than 80 percent of all retail sales still occurred in brick-and-mortar stores](#).

As for who has final authority on technology buying decisions within retail organizations, the overwhelming choice among respondents was CEO/president.

Tech Buying Decisions Come From the Top

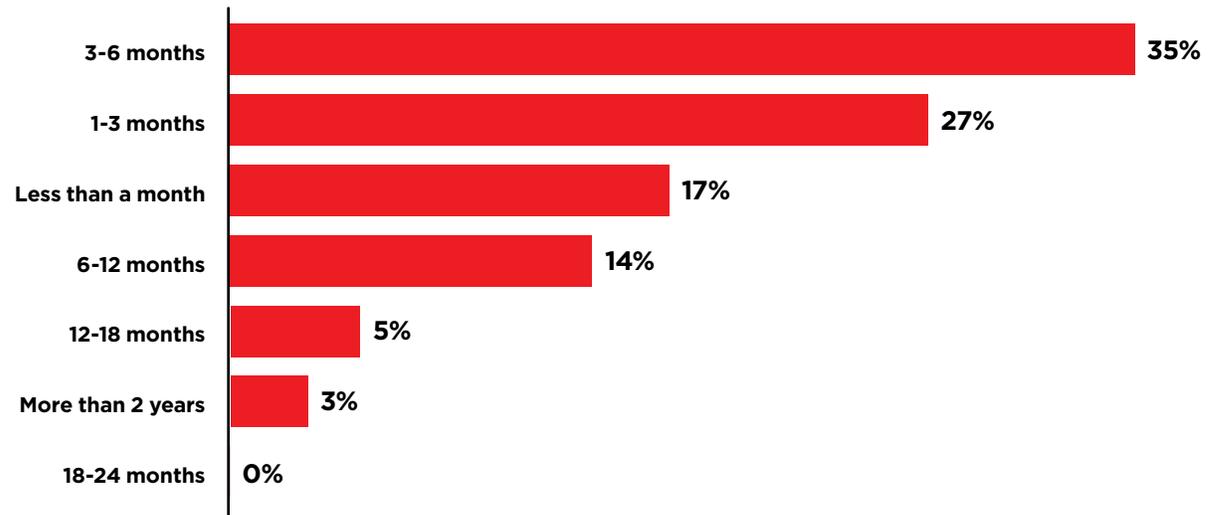


Q: Who within your organization has final say on technology investment decisions?
n=108

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While it's understood that in most organizations the CEO or president has final say on technology investments and spending, the gap between that person and the next closest answer option, C-suite leader of the department the technology is earmarked for (16 percent), is a bit surprising. A more collaborative approach to making tech buying decisions is often recommended, but that doesn't appear to be reality just yet for most retail organizations.

The Buying Cycle Shortens



Q: Thinking about a moderate to major technology purchase at your company, how long on average does the vendor selection process take?
n=108

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When asked how long, on average, the vendor selection process takes for a moderate to major technology purchase at their company, 92 percent of retailers said that it takes less than a year, with the majority of respondents making a decision in less than six months.

Organizations are tasked with making technology decisions at the speed at which the retail industry is evolving, particularly as relates to omnichannel consumer behaviors. In order to keep pace with innovative, digital-native brands, including Amazon.com, and direct-to-consumer (D-to-C) brands, traditional brick-and-mortar retailers have had to embrace change — and do so quickly. This extends to their technology buying processes.

Speed, whether it be for product development, site and app performance, order fulfillment and delivery, among a host of other functions, has never been more critical. Therefore, retailers are no longer afforded the luxury of an extended vetting process when purchasing technology. Their growing sets of competitors are introducing game-changing technologies on a continual basis, and in order to keep pace, decisions must be made swiftly. Those that wait too long to make decisions run the risk of being left behind.

For most respondents, that vetting process typically includes a limited number of service providers in the consideration mix. Slightly more than half of all respondents (51 percent) said they consider three service providers when considering a moderate to major technology purchase, easily outpacing the next most popular answer choice of two service providers (20 percent).

Cost Weighs Heavily in Technology Buying Decisions

	1	2	3	4	5
Cost	53%	19%	14%	7%	7%
Integration with existing systems	29%	24%	24%	10%	13%
Time to implement	8%	34%	26%	24%	7%
Vendor support	6%	16%	22%	29%	28%
Amount of employee training required	5%	7%	14%	30%	44%

*Q: Rank the following factors on level of importance when making a technology investment decision (1 being most important, 5 being least important).
n=108*

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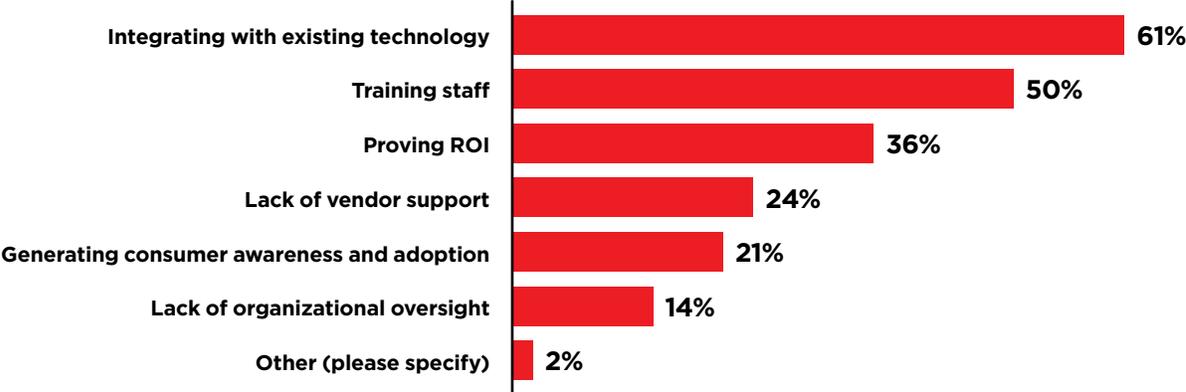
Retailers are overwhelmingly making technology purchase decisions based upon two key factors: cost and integration with existing systems. Regarding the former, this shouldn't come as a surprise. As retailers seek to get the best bang for their buck, they're targeting technology solutions that have proven to yield positive ROI, whether that be in the form of increased sales, decreased costs, or some combination of the two. That's a formula that will never grow old.

As for the latter, it makes sense that retailers would be prioritizing how well a new tech solution would integrate with existing systems, as that is a primary challenge identified by respondents when purchasing new technology (more on that to come). Systems must be able to integrate with each other in order to provide the quick, seamless flow of data that's required to facilitate cross-channel shopping experiences. Think inventory and order management systems working in tandem to enable cross-channel fulfillment while also preventing out-of-stocks. Or CRM and marketing automation platforms, with CRM data powering personalized messaging delivered via automated email, SMS, and social media campaigns.



The amount of employee training needed ranks as the least important factor for retailers when making a technology investment decision. However, when asked to rank challenges with new technology implementations, retailers rank integration No. 1 and training staff as No. 2. Therefore, it seems as if it would serve retailers well to consider the training piece earlier in the vendor selection process.

Retailers Challenged by Integration With Existing Tech Systems



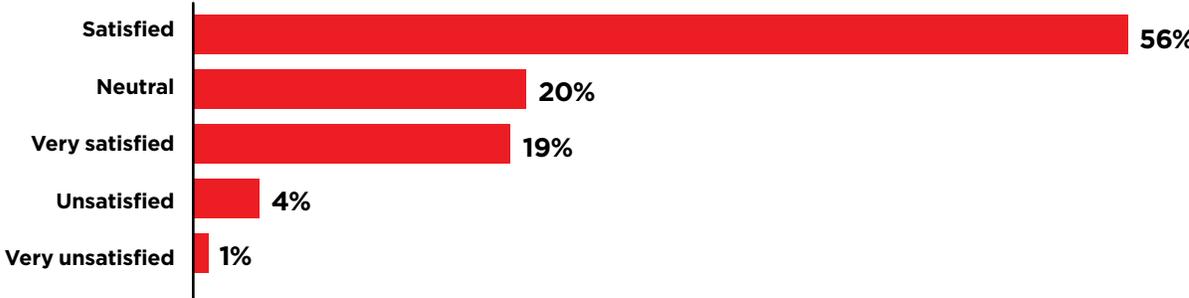
Q: What are the top challenges when implementing a new technology into your business? (Choose up to three.)
n=108



An important factor for retailers to consider when implementing a new technology into their business, particularly one that’s being added to a legacy tech stack, is the level of support available to it from the third-party service provider. A technology purchase and implementation is an investment, and shouldn’t be treated as a one-one transaction. The right vendor will be a partner, there to provide support both during the onboarding and implementation process as well as further along.

The good news is that most retailers are relatively pleased with the level of support they’re currently receiving from their technology vendor partners, as evidenced below.

Rate your satisfaction level for the support your organization receives from its current technology vendor partners.



Q: Rate your satisfaction level for the support your organization receives from its current technology vendor partners.
n=108



CONCLUSION

The survey data featured in the 2022 Retail Technology Report reveals that retailers are reassessing the role of technology within their organizations. To start, they recognize that consumers' wants, needs and behaviors are evolving rapidly, with digital occupying an ever-increasing role in the shopping and purchase journey. To keep pace with this level of change, retailers are increasing their spending on technology, with increased attention and budget allocated to systems that are critical to enabling integrated online-to-offline (and vice versa) customer experiences.

That means spending on “must-haves” such as inventory and order management systems, CRM and customer data platforms, and automated solutions across the organization, including marketing, merchandising, supply chain, stores, customer service, and more. Furthermore, it means being cognizant of what's coming next; being an early adopter rather than a laggard. This applies to technologies such as cryptocurrency, metaverse and NFTs, livestreaming, and AI and ML.

In fact, AI has quickly transitioned from a “nice to have” to a must-have technology for retailers. The multiple applications for AI within retail — marketing personalization, customer service, demand forecasting, supply chain optimization, among others — underscore its value to an organization.

With regards to the technology buying process, retailers are prioritizing speed and simplicity. They're limiting the number of service providers they consider — less than five for 90 percent of respondents — as well as the time they're taking to make moderate to major technology purchase decisions (less than six months for the majority of respondents). Simply put, if retailers wait too long they will be passed by their growing number of competitors.

Lastly, retailers are looking for their tech vendors to be true partners in their businesses, offering consistent support throughout the relationship. Nowhere is this need more pressing than it is for the integration of new tools and platforms into retailers' existing technology stacks. Integrating new technology with existing technology was once again the most oft-cited challenge for retailers. With the right technology partners in place, retailers, third-party providers and, most importantly, customers all win.

METHODOLOGY

This online survey was conducted in February 2022 and March 2022. A total of 108 respondents completed the survey. Those respondents comprised a portion of the Total Retail audience, including omnichannel retailers, brick-and-mortar-only retailers, online-only retailers, CPG brands, and wholesalers. The sizes of those companies ranged in annual revenue from \$1 billion or greater to less than \$1 million.





To Upgrade Your Technology, Start By Enabling Your Store Teams

As retailers brace for an onslaught of tech roll-outs, executives have a responsibility to ensure their frontline teams don't fall behind.

The following article is sponsored by Zipline.

The metaverse. Artificial intelligence. NFTs. Though these are usually dubbed "digital capabilities," all employees, especially those on the frontlines, play a role in bringing these technologies to life. Maybe it's delivering an e-commerce order to the curb for a customer. Maybe it's explaining what an NFT is to a confused parent. Or, it might be as simple as helping a customer scan a QR code.

Retailers simply can't implement better technology without increasing demands on their already overloaded frontline workforce.

While nearly 1 in 4 retailers are planning to increase technology budgets for their IT team, only about 1 in 25 are allocating additional tech spend to their stores. Just because tech spend won't be coming out of the stores org doesn't mean stores won't be impacted. In fact, it's the opposite — brick and mortar store teams are key when it comes to realizing the full potential of this increased spend in other departments.

Retailers who are making big financial bets on cutting edge technology risk their investments falling short if they don't keep their store teams in the loop. Here are three ways executives can prioritize the frontline associate experience to ensure technology rollouts are successful.

Take a collaborative approach to the tech buying process

Customer-facing digital roll-outs, inventory management technology upgrades, and investments in AI and automation don't happen in a vacuum. They require immense coordination between headquarters teams, vendor teams, and - in most cases - frontline workers.

Unfortunately, C-suite leaders still sign off on big technology purchases without taking the time to first gain buy-in from the departments that will feel the downstream effects of the new initiative or product. And more often than not, the teams left out of the loop are the ones who work in, or in service to, the stores.

Today's winning retailers understand the importance their store teams play in the success of any technology rollout. For instance, Gap Inc. made headlines recently when they acquired CB4, a tech startup and AI engine that forecasts demand in terms of what products are going to sell, where they're going to sell, and when they will sell. Gap Inc. has already seen a positive revenue impact, and a large part of that is due to the deliberate way they prioritized change management in the field. "Our store associates are a tremendous asset," said Gap Inc.'s Chief Digital and Technology Officer, John Strain, during a recent shareholder meeting. "No one knows and loves our customers, our products, and our brands, quite like our store associates." As Gap Inc. continues to mature their omni offerings, proactively investing in frontline associates keeps them one step ahead of customer expectations - and the competition.

Before signing off on new technology, loop in Store Operations and Communications leaders who can help assess the extent to which store employees will need to be brought into the change. Forming this partnership upfront ensures your frontline teams embrace new capabilities with open arms and bring your brand to life for customers in the best way possible.



When selecting a tech vendor, consider training from the beginning

Here's a concerning fact: When asked to look at factors that impact technology investment decisions, retailers still rank "the amount of employee training needed" as the least important.

Perhaps employee training isn't the first thing that comes to mind when evaluating front-facing solutions, like augmented reality experiences or RFID technology. But every single one of these solutions is in pursuit of a singular result: transforming the customer experience. And what's more central to the customer experience than the store itself?

To help prepare front-line staff for a new customer environment, best-in-class retailers make investments in training technology alongside their investments in technology. Better yet, these retailers select vendors based on the amount of support they provide in terms of training and change management for frontline teams.

Invest in field enablement solutions that ensure understanding and adoption

While traditional store employee-facing technologies like WFM software, auditing solutions, and LMS platforms might not be on retailers' radars in the coming years, they're essential to ensuring a successful rollout of all the other technologies gaining traction across IT, Customer Service, Marketing, and Supply Chain teams.

You can't successfully roll out new back-of-house automation technology if you lack the ability to track the execution of that roll-out in the field. You can't successfully launch a new e-commerce site if you neglect the necessary training to ensure frontline teams understand how that new platform impacts their day-to-day work.

Retailers have to increase their digital capabilities in order to keep pace with rapidly changing customer expectations. But slapping upgrades on top of a crumbling workforce infrastructure will surely end in failure. In order to ensure your investments in new technology are worthwhile, first lay the proper foundation to enable the store employees who bring those technologies to life.

Zipline is the field enablement platform we wished we had when we worked in stores. It quiets the noise and prioritizes the work for field teams. It puts everything in one place and gives employees the context they need to get their jobs done. Zipline gives you the agility you need to have more control over your business. It allows you to pivot quickly, roll out strategic initiatives and ensure your whole company is aligned.

If you'd like to learn more about how Zipline can ensure your technology upgrades are executed correctly, and on time, learn more at getzipline.com.

WHO WE ARE

Zipline

Zipline is the leading provider of employee enablement solutions for brands with field locations, driving better business agility, sales execution, and employee engagement. Zipline helps brands coordinate communications with the field in a way that streamlines operations and ensures accountability, ultimately improving sales and the customer and staff experience. Brands that use Zipline experience a 130% increase in sales execution and millions of dollars in labor savings annually. The company has a Net Promoter Score of 71, and CBInsights ranked Zipline as one of the 100 most promising B2B retail tech companies in the world. Zipline is Great Place to Work-Certified for its employee engagement, culture, and healthy work-life balance, and was named to the Inc. 5000 list of fastest growing private companies. Today, more than 70 brands like Rite Aid, Sephora, Gap Inc. and AEO Inc. depend on Zipline to align and empower their field teams worldwide.



WHO WE ARE

TotalRetail

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