



18TH ANNUAL GLOBAL SHOPPER STUDY



Retail insights from **around the world**

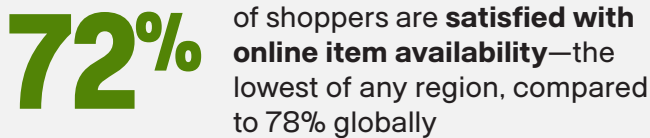
Retail isn't one-size-fits-all. As priorities evolve worldwide, regional insights reveal how people, processes, and strategies are shaping the next era of retail innovation.

Asia Pacific— Navigating rising expectations

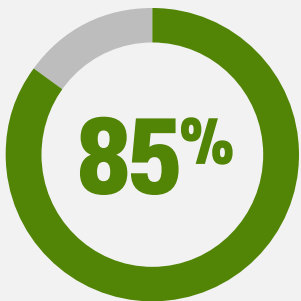
(AUSTRALIA, CHINA, INDIA, JAPAN, NEW ZEALAND)



Shoppers in Asia Pacific are some of the toughest critics, reporting the **lowest satisfaction** among all regions with in-store (75%) and online (69%) experiences



72% of shoppers are **satisfied with online item availability**—the lowest of any region, compared to 78% globally



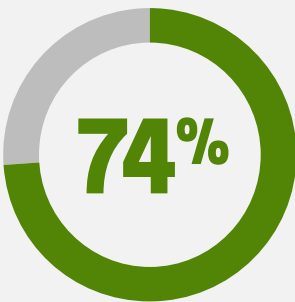
Retailers are responding to the challenge—85% say **syncing real-time inventory is a top priority** to improve demand forecasting and product availability

Europe— Innovating for the future

(FRANCE, GERMANY, ITALY, UNITED KINGDOM)



of European decision-makers rank **retail media networks as the top driver** for improving in-store profitability, vs. 43% globally



of decision-makers agree **improving pricing and promotions management is a top priority**—the highest of any region



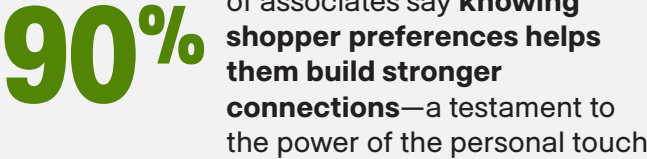
of decision-makers see **Generative AI enhancing augmented reality and virtual try-on** capabilities over the next 3 years—highest of any region

Latin America— Accelerating progress

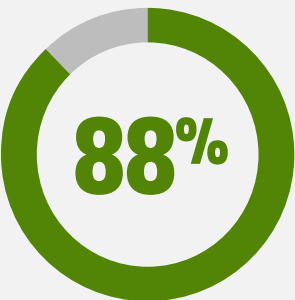
(BRAZIL, CHILE, COLOMBIA, MEXICO)



Latin America leads in unmet expectations—60% of **shoppers left stores without everything they came to buy**, vs. 52% globally



of associates say **knowing shopper preferences helps them build stronger connections**—a testament to the power of the personal touch



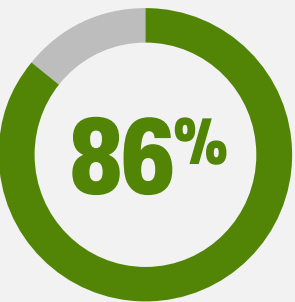
of decision-makers say **Generative AI will improve supply chain optimization** in the next 3 years—slightly above the 85% global average

North America— Elevating efficiency

(CANADA, UNITED STATES)



of associates in North America believe **AI will boost their productivity**—showing a readiness to embrace intelligent tools on the frontline



of decision-makers say **retail media networks are a strategic priority**, compared to 83% globally, signaling strong momentum in digital advertising



of shoppers say **seamless in-store and online integration** is important—highlighting high expectations for a connected experience

To discover more insights from the 18th Annual Global Shopper Study, visit zebra.com/shopperstudy

To see how Zebra empowers retailers worldwide to deliver connected experiences, streamlined operations, and elevated performance, visit zebra.com/retail