

18TH ANNUAL GLOBAL SHOPPER STUDY

Shopper pulse: The new retail reality

See retail through the eyes of today's shoppers who expect seamless, personal experiences powered by innovation, intelligent operations, and the human connection that brings retail to life.

ZEBRA



Delivering for the modern shopper

Today's shoppers expect connected experiences across online and in-store journeys—redefining what great retail means. They reward brands that deliver value, speed, and ease—and they quickly notice when performance slips. As demands rise, every interaction carries more weight. This is **retail's new reality**.



PAGE 3

Shoppers are rewriting the rules of engagement

Shoppers are in control. They decide when, where, and how to engage—holding retailers to a tougher test as competition intensifies and loyalty grows harder to secure.



PAGE 6

Every journey raises shopper expectations

Shoppers expect the path to purchase to be consistent across all channels. They want convenient, connected interactions, making flawless execution the benchmark retailers are judged against.



PAGE 9

The future belongs to effortless experiences

Empowered associates, AI, and automation are reshaping how shoppers engage with retail. It's a powerful mix, raising expectations and setting new standards for the industry.

A man with a beard and glasses, wearing a blue bucket hat and a striped shirt, is smiling in a clothing store. He is standing in front of a rack of clothes.

SHOPPERS ARE REWRITING THE RULES OF ENGAGEMENT

Shoppers are setting the terms: savings, convenience, speed, and personalization.

78%

of shoppers say using coupons and searching for discounts/promotions has become more important due to inflation and rising prices

Shoppers comparison shop for savings across channels, and personalized offers tip the scales.

71%

of shoppers are concerned about having to switch products or brands due to price increases attributed to tariffs

Rising prices are testing loyalty and adding pressure to every purchase decision.

What's at stake isn't just one sale—it's whether shoppers return.

Retailers face tough realities and must meet shoppers where it matters most—in the moment, in the aisle, and on the move.

Value is more than price— it's personal

Value goes beyond the lowest price tag—it's about relevance and connection.

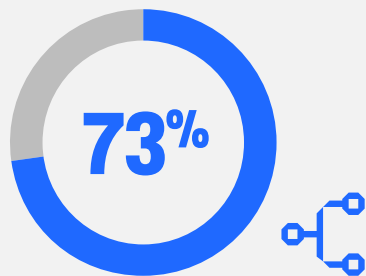
Discounts matter more in a price-sensitive market, and 81% of shoppers say they are more likely to buy when they receive one. But offers resonate most when they reach the right person at the right time. When they connect, shoppers see more than savings—they see themselves, reflected in the moment.

Beyond discounts, toward connections

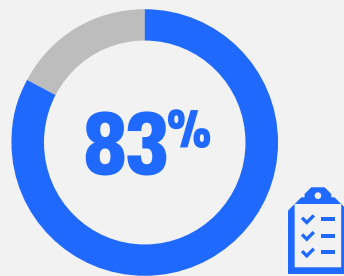
Nearly three in four shoppers want more tailored ads when shopping in store. That expectation is fueling the rise of retail media networks (RMNs), which are projected to surpass \$300 billion by 2030.¹ By linking promotions with shopper data, RMNs deliver more relevant offers for shoppers and new revenue streams for retailers.

The payoff is clear. Seventy-three percent of shoppers say they're likely to use RMNs, and 83% of decision-makers rank them among their top technology priorities for the next five years. RMNs are also driving growth, with in-store advertising and RMNs now ranked as the No. 1 driver of in-store profitability, up 6 percentage points year over year.

Shoppers and retailers align on retail media networks

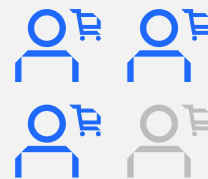


of shoppers say they are likely to use retail media networks



of decision-makers say retail media networks are an important technology priority over the next five years

Tailored offers and discounts influence shopper behavior



3 out of 4

shoppers are likely to use location-based coupons

72%

of shoppers want to see more personalized promotional ads when shopping in store

81%

of shoppers say they're more likely to buy when they receive a coupon or discount



¹Omdia, Retail media set to capture one-fifth of global ad revenue by 2030, September 4, 2025.

Closing gaps, keeping shoppers

Few moments matter more than when a shopper is ready to buy. An empty shelf, a missing item, or a long line can turn anticipation into frustration—and a retailer into an afterthought. More than half of shoppers (52%) say they've left a store empty-handed in the past three months.

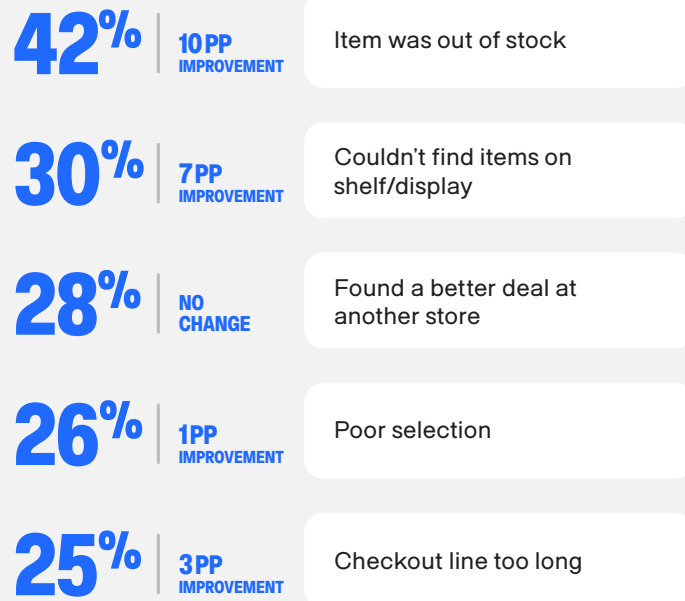
Signs of progress are clear

The encouraging news? The 52% figure reflects a five-percentage-point improvement from last year—a clear sign of measurable progress. Shoppers are encountering fewer service gaps, particularly around availability and ease of finding products. Retailers are responding with real investment: 69% of IT budgets are now dedicated to devices, software, and workflow automation.² The trend is moving in the right direction. Shoppers are finding more of what they need—and they're rewarding retailers who deliver.

Even with progress, operational gaps still carry steep costs. When shoppers don't find what they came for, trust erodes. Decision-makers see it too: 82% say their organizations are under great pressure to minimize out-of-stocks. Retailers that consistently deliver win more than a sale—they win loyalty that brings shoppers back.

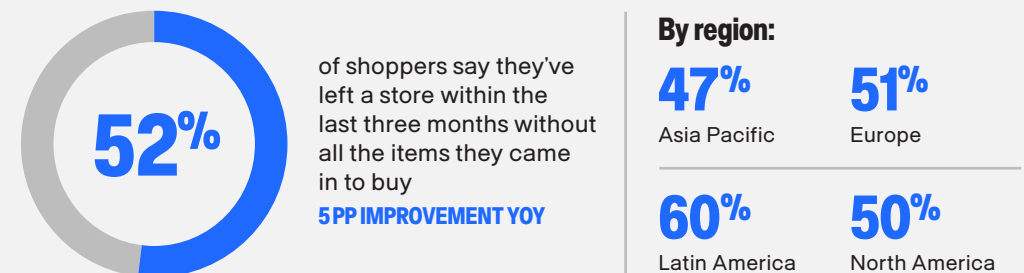
In-store shopping hurdles are easing

Shoppers cite fewer barriers when leaving a store without everything they came to buy. *Improvements shown vs. 2023.*



Fewer walkouts, region by region

Progress is showing up worldwide, though challenges remain



² Oxford Economics and Zebra Technologies, *Elevating Retail Value: The Impact of Intelligent Operations*. 2025.



EVERY JOURNEY RAISES SHOPPER EXPECTATIONS

**Seamless journeys
are the standard—
and shoppers notice
when retailers fall short.**

79%

of shoppers say seamless integration between in-store and online shopping is important

Disconnected systems don't just break the journey—they risk breaking the relationship.

75%

of shoppers expect retailers to use the latest technology

Advanced tools aren't a bonus—they drive convenience and influence how shoppers see the brand.

From browsing to buying to returns, shoppers look for consistency, visibility, and speed.

Meeting those needs isn't optional—it's how brands earn lasting trust in a world where the next choice is only a click away.



Satisfaction is fragile

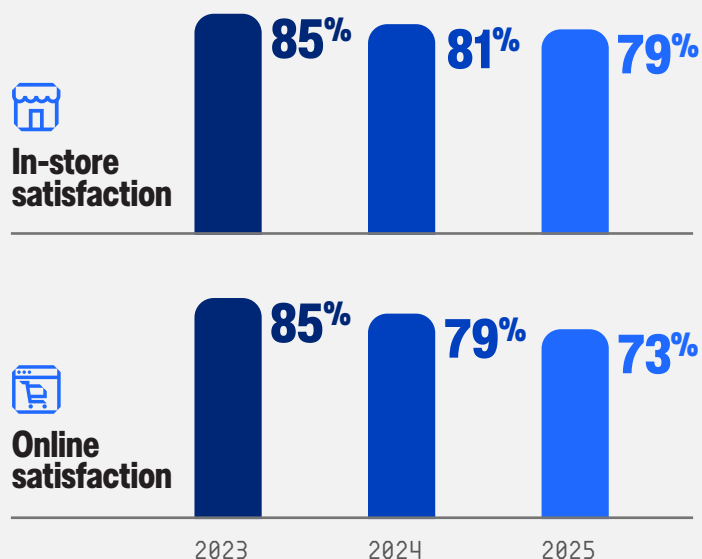
Shoppers remember how a store makes them feel. A friendly greeting, quick assistance, or knowledgeable help can shape how they view a brand. But when service falls short, the impression lingers. Overall shopper satisfaction is falling. In three years, in-store ratings dropped 6 percentage points and online ratings fell 12 points. The message is clear: shoppers notice when performance slips, and retailers can't ignore it.

The difference makers

Associates bring a brand to life, but too often they're tied up with routine tasks instead of focusing on shoppers. Nearly half of associates report frustration at having little time to help customers. That often leaves shoppers without the attention they expect. And shoppers are asking for it: 73% want to interact with in-store associates—proof that human connection remains at the heart of retail.

Associates see the value in mobile devices that let them check inventory, accept payments, assist with online orders, and more. Oxford Economics found a clear link between workflow modernization and customer experience, with optimized workflows boosting satisfaction on average by 21%.³ Gains of that scale are impactful—and they should prompt every retailer to consider how technology can unlock better service and stronger shopper trust.

Shopper confidence is eroding



Top five ways mobile devices are redefining shopping

Associates rank the benefits mobile devices deliver

- 1 Save the customer time
- 2 Improve customer shopping experience
- 3 Find a product
- 4 Help in the return/exchange process
- 5 Save the customer money

³Oxford Economics and Zebra Technologies, *Elevating Retail Value: The Impact of Intelligent Operations*. 2025.

Every touchpoint counts

Retailers are confident they're meeting shopper expectations—but the shopper's view often tells a different story. In the space between intention and execution, satisfaction quietly slips away.

Shoppers expect retailers to get the basics right—but what they experience doesn't always match. On fundamentals like returns, checkout, and product availability, decision-makers often overestimate customer satisfaction.

The widest gaps appear in routine interactions—where retailers most often overestimate shopper satisfaction. The ability to order out-of-stock items on the spot shows a 13-percentage-point gap between shopper satisfaction and retailer perception. Returning online items to a store has a 12-percentage point gap. Even on checkout speed, item availability, and in-store returns, perception consistently outpaces performance.

Even small disconnects accumulate. What feels like a minor service shortfall to a retailer can feel like a broken promise to a shopper. Closing these gaps means investing in the fundamentals: accurate inventory, faster checkouts, and hassle-free returns. Retailers that close the gap between perception and performance are the ones earning trust and repeat visits.



Easy returns are essential

79% of shoppers prefer retailers that offer easy returns (by mail or in store)

Retailers know the gaps are costly

84% of decision-makers say they're under pressure to synchronize real-time inventory across channels



Retail's blind spots: The shopper perspective

In store

SHOPPERS **66%** | 13 PP GAP

DECISION-MAKERS **79%**

66% of shoppers are satisfied with **the ability to order out-of-stock items on the spot**—yet **79% of decision-makers** believe they're delivering

74% | 8 PP GAP

82%

74% of shoppers are satisfied with **the time it takes to check out**, compared to **82% of decision-makers**

Online

69% | 12 PP GAP

81%

69% of shoppers are satisfied with **returning items to a physical store**—versus **81% of decision-makers**

71% | 11 PP GAP

82%

71% of shoppers are satisfied with **availability to pick up an item at a store**, compared with **82% of decision-makers**

THE FUTURE BELONGS TO EFFORTLESS EXPERIENCES

The future of retail is human—and increasingly AI-powered.



71%

of shoppers say they have a better experience when store associates use the latest technology to assist them

For shoppers, the right tools turn service into connection.

87%

of associates agree they can provide a better customer experience using generative AI

For associates, intelligent operations unlock their full potential.

The future won't be powered by technology or people alone.

Retailers who thrive will be those who blend the human touch with AI precision—removing friction while creating service that feels extraordinary and memorable.

Automation powers effortless convenience

Automation is no longer a nice-to-have—it's becoming the new measure of service.

Shoppers judge performance not only by human interaction but by how quickly they can move through a store, return an item, or check out. Seventy-six percent of shoppers say they want to get in and out quickly when shopping in store. For today's shoppers, speed is service.

Redefining convenience

Self-service is reshaping how shoppers move through their journey. Innovations like scan-as-you-go, interactive screens, and automated checkout give shoppers faster ways to shop and more control. Nearly three in four (74%) say using a self-checkout lane is faster than one staffed by a person—a perception that's fueling a major shift. Today, self-checkout has become the top in-store payment choice, while preference for staffed registers has fallen 16 percentage points since 2021.

Automation pays off for retailers too

The benefits extend behind the counter. Oxford Economics found that retailers who automated workflows realized on average a 20% boost in employee productivity.⁴ By freeing associates from repetitive tasks, automation creates more room for the kind of high-value service that keeps shoppers coming back.



Experience drives repeat use

Among shoppers who have tried these solutions in the past six months, the vast majority say they are likely to use them again

95%

personal shopping device provided by store to scan as you go

93%

self-return station (staff-free returns)

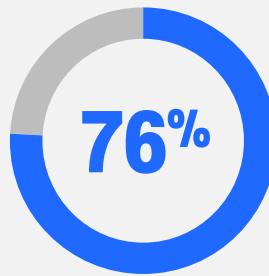
92%

interactive screens throughout the store

89%

auto checkout (items detected and charged automatically)

A new appetite for personal shopping devices is transforming the in-store journey



of shoppers say they'd use a mobile device provided by the store to scan as they shop, locate and bag items, and checkout all on the device

By generation:

81%
Gen Z (18+)

80%
Millennial

75%
Gen X

66%
Boomer+

⁴Oxford Economics and Zebra Technologies, *Elevating Retail Value: The Impact of Intelligent Operations*. 2025.

AI is here— and it's redefining retail

Artificial intelligence is moving from promise to practice. Shoppers already feel its impact in subtle but important ways, from smoother recommendations to faster support. Behind the scenes, retailers see its potential extending much further.

AI's influence reaches every corner of retail

Generative AI is projected to impact nearly every part of retail operations in the next three years. Decision-makers highlight its role in delivering personalized recommendations (84%) as well as strengthening inventory management and demand forecasting (86%). They also point to opportunities in dynamic pricing and voice commerce, with augmented reality and virtual try-on at 88%. The range of applications shows how far AI's impact extends. It changes how shelves are stocked, how prices adjust in real time, and how shoppers discover products in the aisle.

Shoppers are open to this evolution. A strong majority—69%—believe AI will improve their experience, and that view spans every generation. From discovering products to receiving timely offers, shoppers see AI as a tool that can simplify decisions and make the journey more relevant. AI is being woven into nearly every aspect of retail—connecting shoppers with the operations that make them possible.

Retailers are betting big on AI agents

Decision-makers highlight the importance of emerging technologies as extremely/very important to their organization over the next 5 years

83%

Knowledge AI agents

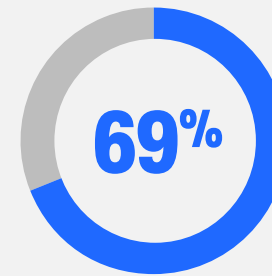
81%

Merchandising AI agents

78%

Sales AI agents

Artificial intelligence earns high marks from shoppers of every age



of shoppers agree artificial intelligence will improve the shopper experience

By generation:

72%

Gen Z (18+)

74%

Millennial

68%

Gen X

60%

Boomer+



SUMMARY

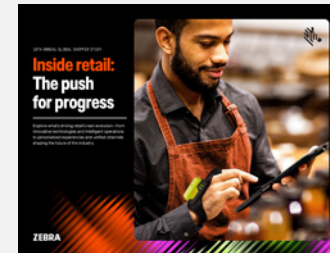
Shaping the next era of retail

Shoppers have higher expectations than ever for speed, personalization, and convenience across every interaction. Retailers aren't standing still. They're leading with innovation, investing in intelligent operations, automation, and empowered associates to redefine what great experiences look like.

The future belongs to those who unite people and technology in ways that feel both seamless and human. By doing so, they aren't just meeting today's demands. They're shaping the connected, intelligent, inspiring new era ahead.

About the study

Zebra commissioned a global research study among adult shoppers (age 18+), decision-makers, and associates to analyze the trends and technologies transforming the retail sector. Administered online by MAVRIX, formerly Azure Knowledge Corporation, this year's study includes over 4,200 respondents across topics of shopper experience, device and technology usage, delivery and fulfillment in store and online.



To view the 18th Annual Global Shopper Study series, visit zebra.com/shopperstudy

About Zebra Technologies

Zebra (NASDAQ: ZBRA) provides the foundation for intelligent operations with an award-winning portfolio of connected frontline, asset visibility, and automation solutions. Organizations globally across retail, manufacturing, transportation, logistics, healthcare, and other industries rely on us to deliver outcomes today while driving innovation for what's next. Together with our partners, we create new ways of working that improve productivity and empower organizations to be **better every day**.

To learn how Zebra equips retailers to stay ahead—enhancing the shopper journey, elevating store performance, and driving profitability in every channel, visit zebra.com/retail



The Zebra wordmark and logo are trademarks of Zebra Technologies Corp., registered in many jurisdictions worldwide. All other trademarks are the property of their respective owners.
©2025 Zebra Technologies Corp. and/or its affiliates. 10/10/2025.