



17th Annual Global Shopper Study

The Retail Imperative

Thriving in a World of Infinite Choice

Executive Summary

Uncover insights from shoppers, associates and retail decision-makers to reveal the strategies that elevate experiences, boost profits and empower associates to thrive in today's dynamic retail environment.



Elevating Retail in a Connected World

As consumers become increasingly connected, retailers are discovering fresh ways to adapt and meet their ever-growing expectations. Shoppers now seek seamless, personalized experiences—whether online or in store. To succeed in this environment, it's essential to elevate the fundamentals: providing the right products at just the right time, streamlining every interaction and empowering associates to craft memorable service moments.



Shoppers Demand Seamless, Personalized Service Across All Channels

Streamlined service is key

70%

It's hard to find an associate to help while shopping in store

75%

When retailers know shoppers' personal preferences, they are more willing to try/buy what associates recommend

78%

Shoppers find it annoying when products are locked up or secured within cases

Omnichannel is the new norm

78%

Prefer a blend of in store and online shopping

78% ↑ +3pp YoY

Prefer to shop with online retailers that also have brick-and-mortar locations

82%

Prefer retailers that offer easy returns



Associates Seek Tools and Recognition to Excel

Associates need help managing stress and feeling valued on the job

83%

Struggle to prioritize tasks due to the volume of responsibilities and competing priorities

79%

Feel stressed due to the increasing complexity of day-to-day work

87% ↑ +3pp YoY

Feel more valued by their employer when they provide technology tools to help them work

Associates prefer completing tasks with the aid of technology

85%

Prefer to manage their schedule via a mobile device/application

85% ↑ +6pp YoY

Prefer automatically prescribed tasks for managing their day and figuring out the right tasks to focus on

86% ↑ +7pp YoY

Prefer collaborating with their team via a store mobile device/application



Decision-Makers Navigate Profit Pressures and Plan for an Automated Future

Maintaining profit margins is a challenge

83%

Minimizing fraud/shrinkage is a significant challenge

78% ↑ +6pp YoY

Are under high pressure to minimize theft and loss

82%

Maintaining profit margins while meeting workforce expectations for increased salary and benefits is difficult

Automation is the future

85%

Company needs better inventory management tools to improve accuracy and availability

86% ↑ +9pp since 2022

Increasing use of automation and robotics would offset workforce gaps

76%

Plan to increase investments in inventory visibility

Guaranteeing Satisfaction

Delivering Frictionless, Personalized Shopping Experiences

Today's retail shopper is savvy and acutely aware of how inflation and inconvenience affect their experience.

As a result, expectations are higher than ever and retailers must work harder to meet them. Shoppers no longer see online as an alternative to in-store shopping but expect all channels to flow seamlessly. Despite this, overall satisfaction declined year over year, with noticeable changes occurring in store and online. This reality signals a need for retailers to intensify focus on the fundamentals, reducing friction and delivering a seamless, satisfying experience across all channels.

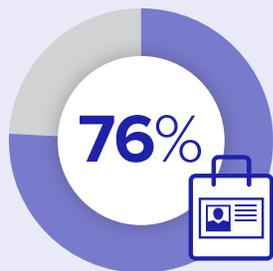
A lack of accurate, real-time inventory visibility disrupts shoppers and frustrates associates, leading to missed sales opportunities. Today's shoppers come prepared with information and expect store associates to add value beyond transactions, offering knowledgeable insights and personalized service. Three-fourths of shoppers believe that retailers who understand their preferences should provide more personalized experiences, underscoring the importance of tailored customer interactions.

To stay competitive, retailers must match and exceed their rivals' offerings by providing fast fulfillment, easy exchanges and returns, and ensuring enough associates to assist customers seamlessly. Seventy-eight percent of shoppers find it frustrating when products they want are locked up or secured within cases, which adds friction to the shopping experience. By leveraging technology to empower associates and provide real-time data, retailers can strengthen customer loyalty and enhance brand connections.

Shopper Satisfaction Declines Year-Over-Year



Shoppers Across Generations are Looking for Personalized Retail Experiences



of shoppers expect a unique and tailored experience when retailers know their personal information or preferences

By Generation:



Top Factors Fueling Shopper Satisfaction

- | In Store | Online |
|---------------------------------------|--|
| Ease of finding products | Ease of finding products |
| Ease of finding the correct prices | Ease of finding the correct prices |
| Availability of coupons and discounts | Availability of digital coupons and discounts |
| Variety and selection of products | Availability of online help / customer service |
| Availability of staff | Availability of item in stock |

Profit Protection

Increased Inventory Visibility and Enhanced Shrink Prevention

Retailers face growing challenges in safeguarding profits as losses from retail theft, fraud, increased returns and unsellable products continue to erode profitability. In the past 12 months, 52% of decision-makers reported an increase in shrink. Regrettably, these drains on profitability have become an unavoidable cost of doing business. That's why it is essential for retailers to acquire the intelligence needed to predict shrink more accurately while continuing efforts to minimize its impact on both profitability and the shopping experience. Comprehensive strategies integrating real-time data monitoring and advanced analytics help better identify vulnerabilities, predict trends and flag suspicious activity.

The impact of these threats extends beyond profits, creating unease among employees. Store associates are increasingly concerned about theft and violence, compounded by a perceived lack of technology to prevent these incidents. Shoppers, too, worry that the rising cost of theft will be passed on to them through higher prices. As anxiety grows for associates and customers, many retailers are rethinking their approach to security to better address these concerns.

Retail decision-makers see generative AI, prescriptive analytics and RFID as key technologies to reduce shrink. These tools help identify theft patterns, recommend preventive actions and improve inventory visibility, boosting efficiency and profitability.

Shrink Is on the Rise

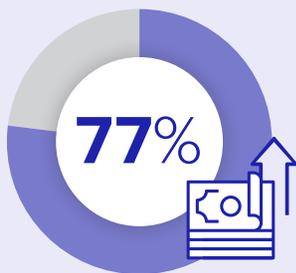
52% 
of decision-makers report an increase in retail shrink in the past 12 months

Rising Crime Sparks Associate Fears

84% 
of associates are concerned about personal safety due to rising theft and crime in stores

84% 
of associates are concerned about lack of technology to spot safety threats or criminal activity

Shoppers Fear Higher Prices



of shoppers are concerned that retailers may raise prices to cover the cost of increasing retail theft and crime

By Region:

Asia Pacific
68%

Europe
73%

Latin America
80%

North America
85%



Supercharging Loss Prevention

Decision-makers believe key technologies can reduce shrink

-  Generative AI
-  Prescriptive analytics
-  Self-checkout cameras and scanners
-  Public view monitors
-  RFID tags and readers

The Future of Work

Augmenting Associates for Smarter, More Efficient Collaboration

Associates and decision-makers recognize the need for more associates needed in store to help take care of shoppers

Associates



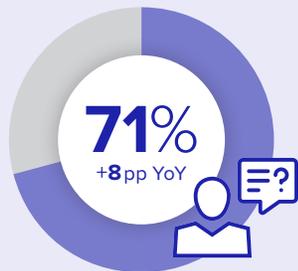
Decision-Makers



Amid evolving workforce dynamics, retailers are grappling with high employee turnover and escalating costs related to acquiring, training, reskilling and retaining talent, which strain operations. The time it takes to fill positions, extended training periods and difficulty sourcing temporary workers for peak seasons are significant pain points. In fact, 85% of associates and 81% of decision-makers agree that their stores need more associates available to help take care of customers. Communication gaps persist, making it difficult to relay information to the right people and confirm the completion of essential tasks.

Many retailers are turning to technology and mobile devices to address labor challenges and better support their workforce. This strategy helps attract and retain employees, with 85% of associates and decision-makers agreeing that technology enhances workforce stability. Well-equipped teams can better meet shopper expectations—critical in an environment where 71% of consumers are frustrated by the lack of in-store assistance. By assigning specific tasks and providing easy access to information, retailers empower associates to focus on priorities, boosting morale and efficiency. These technological solutions are vital to building a motivated and capable workforce in today's competitive labor market.

Shoppers Frustrated by Lack of Assistance



of shoppers are concerned about lack of help from associates

By Generation:

Gen Z (18+)	Millennials	Gen X	Boomers
72%	69%	68%	76%

Hiring and Training Issues Challenge Retailers

Retailer labor challenges for hiring and training qualified staff remain problematic

- Length of time to fill a position
- Training time is too long
- Finding temporary workers for peak season
- Attracting qualified workers



Technology Boosts Labor Retention



Stores that leverage retail technology and mobile devices attract and retain more associates



Achieving Operational Excellence

The Key to Unmatched Shopper Satisfaction

Today's shoppers expect a seamless blend of physical and digital experiences, where every interaction feels connected and effortless. Over the past five years, the retail industry has faced unprecedented disruptions, leading to significant shifts in customer expectations. To thrive in this evolving landscape, retailers must embrace strategic investments in customer-facing technology, workforce enablement and inventory management systems to meet heightened demands while protecting profits.

Empowering associates with advanced technologies streamlines operations and improves inventory visibility, enhancing their ability to provide exceptional service. Retailers that prioritize operational excellence and equip their teams to meet modern challenges will foster long-term customer loyalty and thrive in a market where convenience, speed and personalization are vital to success.

About the Study

Zebra Technologies 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 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. Zebra's 17th Annual Global Shopper Study series reports on the attitudes, opinions and expectations shaping the industry's future. The series focuses on three key themes:



Beyond Expectations
Elevating Experiences in a Frictionless World



Driving Profitability
Tackling Retail's Biggest Challenges



Unlocking Excellence
The Power of Engaged Associates

To view the entire 17th Annual Global Shopper Study series, visit zebra.com/shopperstudy

Explore how Zebra can assist retailers in improving customer experience, enhancing omnichannel operations and protecting profits, visit zebra.com/retail



NA and Corporate Headquarters
+1 800 423 0442
inquiry4@zebra.com

Asia-Pacific Headquarters
+65 6858 0722
contact.apac@zebra.com

EMEA Headquarters
zebra.com/locations
contact.emea@zebra.com

Latin America Headquarters
zebra.com/locations
la.contactme@zebra.com

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About Zebra Technologies

Zebra (NASDAQ: ZBRA) empowers retail organizations and their associates to thrive in the on-demand economy by making every front-line worker and asset at the edge visible, connected and fully optimized. With an ecosystem of more than 10,000 partners across more than 100 countries, Zebra serves customers of all sizes, including 94% of the Fortune 100, with an award-winning portfolio of hardware, software, services and solutions that digitize and automate workflows.