



17th Annual Global Shopper Study

Beyond Expectations

Elevating Experiences
in a Frictionless World

See how retailers are building lasting customer loyalty through seamless shopping journeys, personalized experiences and innovative technology that enhances convenience and removes barriers.



A Growing Challenge: Shopper Satisfaction Declines



-4 pp
YoY

81%

of shoppers are satisfied with their experience

79%

-6 pp
YoY



Online

By Generation:

Gen Z (18+)
79%

Millennials
83%

Gen X
83%

Boomers
79%

Gen Z (18+)
72%

Millennials
82%

Gen X
78%

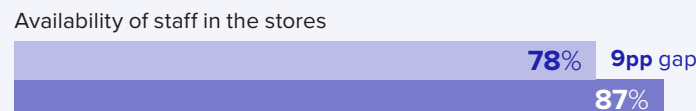
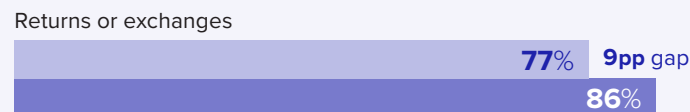
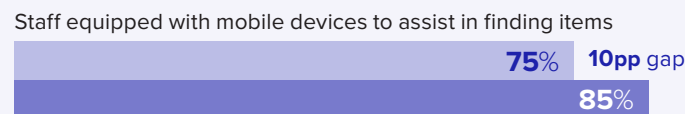
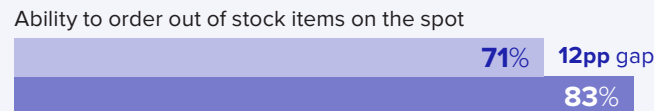
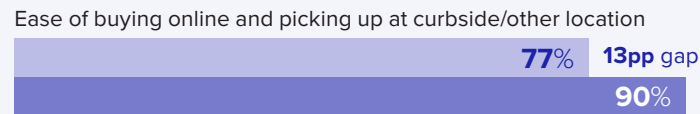
Boomers
77%

Reversing Declines: Winning Back Shoppers

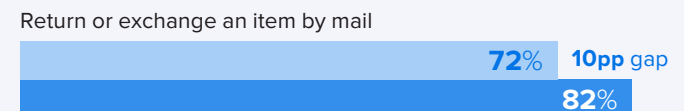
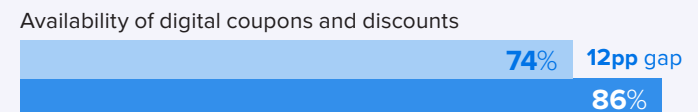
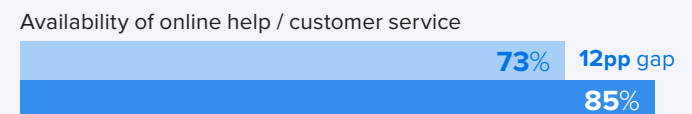
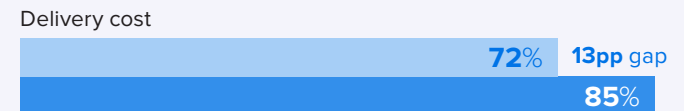
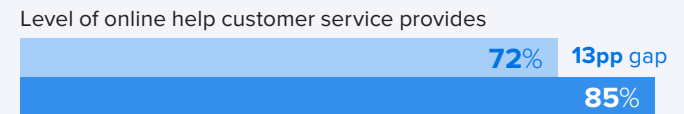
Shopper satisfaction has declined both online and in stores, revealing growing frustration with key elements of the shopping experience and signaling a shift in expectations. To regain momentum, retailers must focus on refining the customer journey and addressing the growing demand for seamless, personalized service. By streamlining operations and delivering exceptional experiences across all channels, retailers can swiftly rebuild loyalty and position themselves for long-term success.

Sharp Divide: Decision-Makers Overestimate Shopper Satisfaction Across Key Areas

In-Store Shopping Satisfaction



Online Shopping Satisfaction



Shoppers' experience | Decision-makers perception of shoppers' experience

Retail at a Crossroads

Rebuilding Shopper Satisfaction

Shopper Preferences

82% ^{+6pp since 2020}
retailers that offer easy returns

78%
a blend of in-store and online shopping

78%
online retailers that also have brick-and-mortar locations

Although shopper satisfaction remains relatively high, recent declines—both in store and online—could signal potential challenges ahead. A sharp divide between decision-makers' perceptions and shoppers' realities further complicates matters, with retailers consistently overestimating satisfaction in critical areas like customer service and delivery costs. These signs of declining satisfaction may point to deeper issues as retailers struggle to keep pace with evolving customer expectations, underscoring the need for immediate and decisive action.

Modernization and the push toward omnichannel strategies have dramatically reshaped the shopping experience, from the rise of online shopping to the introduction of self-service kiosks and mobile device checkouts. However, in their rush to embrace omnichannel operations, retailers may have overlooked the core drivers of shopper satisfaction, leading to frustration over service gaps, product shortages and inefficient checkout processes.

To reverse these trends and restore shopper loyalty, retailers must refocus on the essentials: ensuring associates are readily available, keeping shelves fully stocked and delivering a seamless and efficient experience across all channels. By addressing these pain points, retailers can reverse the downward trend and provide the satisfaction shoppers increasingly demand.



Generational Gaps: Different Expectations for Finding Help In Store



of shoppers agree it's hard to find an associate to help while shopping in a store

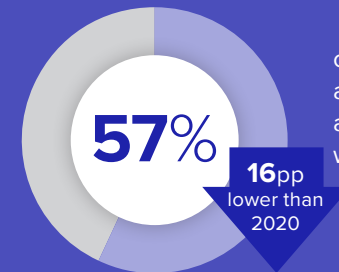
By Generation:

Gen Z (18+)	Millennials	Gen X	Boomers
66%	67%	70%	76%

Why Shoppers Leave Without Buying

- Item was out of stock
- Couldn't find items on shelf/display
- Checkout line too long
- Found better deal at another store
- Poor selection

Missed Sales: Incomplete In-Store Shopping Trips



of shoppers left a store without all items they wanted to buy

Connecting with Customers

The Era of Personalization

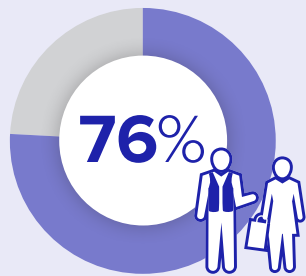
Personalization has become a fundamental expectation for today's shoppers, both online and in stores. Nearly three-quarters of shoppers now expect unique, tailored experiences when retailers understand their preferences and personal information. This level of customization is no longer a luxury—it's essential to delivering the frictionless customer service that shoppers demand.

Consumers increasingly value interactions that feel personal and expect retailers to use the data they've shared to enhance their experience. By leveraging this data to provide personalized recommendations, retailers can create deeper engagement and greater satisfaction. Aligning store associates' interactions with these insights helps build loyalty and encourages repeat business.

Associates also recognize the value of personalization. They see it as a critical driver of sales and customer relationships, and they know that technology is crucial to scaling these personalized experiences. Retailers that effectively use customer data to offer relevant recommendations and meaningful interactions will differentiate themselves in a competitive market. Investing in technology to capture and analyze customer preferences is critical to sustaining personalization in the future.



Shoppers Crave Personal Interactions



76% of shoppers want to be able to personally interact with associates while shopping in stores

By Generation:

Gen Z (18+)	Millennials	Gen X	Boomers
74%	74%	76%	78%

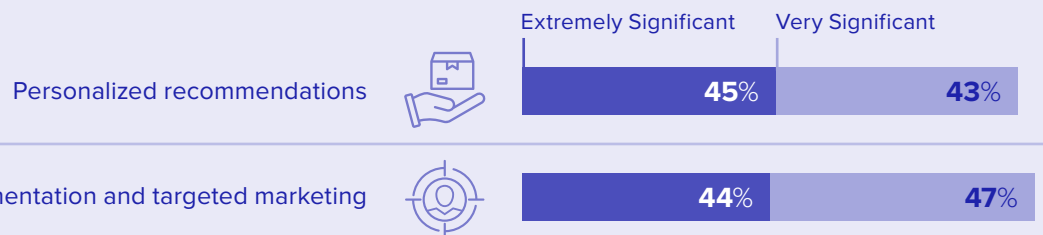
Associates Build Stronger Connections

86%

of associates agree when they know a customer's personal information/preferences, it's easier to build a strong connection

AI Powers Personalized Retail Experiences

Decision-makers predict the impact of Generative AI over the next three years



86%

of associates concur when they understand customer's personal information/preferences, shoppers are more willing try/buy what they recommend

The Self-Service Surge

Balancing Convenience with Human Connection

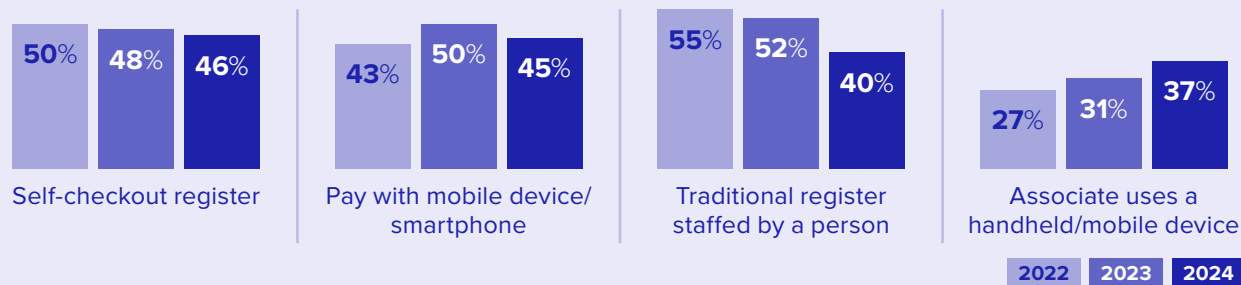
As consumers increasingly embrace self-service technologies like interactive kiosks, mobile apps and real-time inventory systems, the shopping journey is becoming more streamlined than ever. These innovations reduce friction, accelerate purchases and enhance satisfaction by providing a personalized, tech-driven experience.

While the rise of self-service might seem at odds with the need for assistance, it highlights the complexity of modern shopping behaviors. Shoppers want flexibility—a frictionless, self-guided experience when browsing but fast, attentive service when needed to find products, check out, or make returns.

For retailers, the challenge is clear: they must embrace technology while ensuring that personal service remains accessible when needed most. Those who successfully balance both will meet evolving expectations and create a more adaptable, future-ready shopping experience.

Checkout Evolution: Shoppers Embrace Mobile and Contactless Options

Preferences for in-store checkout methods



2025: Retailers Plan for Significant Investment Growth

2025 expected investment/spending plans



Self-Checkout:
Satisfaction Rises,
More Lanes Needed

68% ↑ +10pp YoY ↑ +14pp since 2020

of shoppers echo concerns about lack of self-check-out lanes

78% ↑ +3pp YoY ↑ +14pp since 2020

of shoppers agree self-checkouts improve customer experience

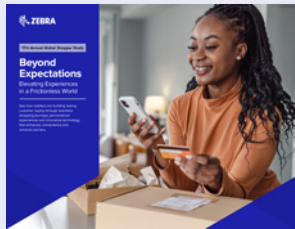
Reclaiming Retail's Edge

Delivering Service Shoppers Expect

Retailers are facing increasingly discerning customers who demand seamless shopping experiences and have little tolerance for inefficiencies. To stay competitive, businesses are focusing on key strategies: maintaining product availability at competitive prices, streamlining checkout processes and facilitating easy returns. Resolving staffing challenges is equally important to ensure that both in-store and online shoppers receive the personalized service they expect. By strengthening these service foundations, retailers can deliver experiences that truly stand out and create meaningful connections that leave a lasting impact on their customers.

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

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.



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