



17th Annual Global Shopper Study

Unlocking Excellence

The Power of Engaged Associates

Explore the latest research findings and see how retailers are leveraging technology, training and support to empower their teams, drive exceptional service, foster customer loyalty and cultivate a workplace where associates thrive.



Elevating Service: Empowering Frontline Teams

Frontline associates are essential to delivering outstanding customer service, yet they often face barriers that reduce efficiency and affect shopper satisfaction. Challenges like limited time to assist customers and feeling that shoppers can find information faster on smartphones can contribute to workplace stress. Managing out-of-stock items, while a common task, adds to these pressures and underscores the need for better tools and support. To uphold high standards and address issues like burnout and labor shortages, retailers are increasingly investing in technology training and tools that boost productivity and empower associates to deliver higher-quality experiences.

Barriers to Great Service: What Frustrates In-Store Associates Most



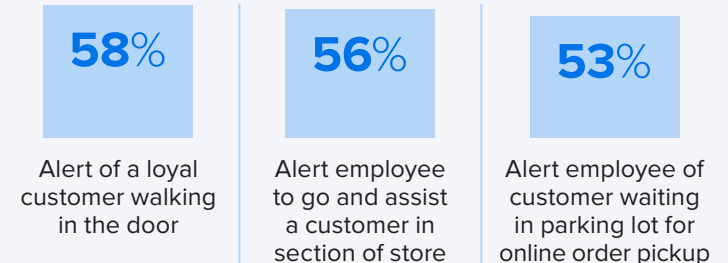
Automating the In-Store Experience: What's Next in Retail

Percentage of decision-makers planning to implement automation of activities in the next 1 to 5 years

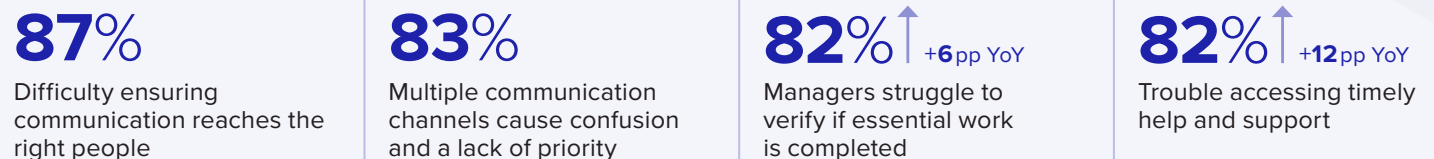
Streamlining Core Operations



Enhancing the Customer Experience



Mixed Signals: Associates' Communication Struggles



From Aisle to Inventory

Overcoming Retail's Operational and Workforce Hurdles

Retail decision-makers worldwide face critical challenges impacting store and warehouse operations. In today's fast-paced retail environment, the demands of managing complex workflows, ensuring effective communication and optimizing inventory levels are becoming increasingly intense. Workforce management stands out as a key concern, with 85% of decision-makers agreeing that operations managers spend too much time on these tasks, highlighting the strain on day-to-day operations.

Inventory and communication issues continue to be significant pain points. Poor communication can result in delays, errors and difficulties locating items, while inefficient inventory management can lead to out-of-stock or overstock, affecting customer satisfaction and profitability. With 79% of associates reporting stress due to the increasing complexity of their daily responsibilities, the need for streamlined, data-driven solutions is clear.

Retailers recognize that integrating technology, especially mobile devices, is critical to addressing these challenges. Mobile technology aids in task management and contributes to employee satisfaction, with 87% of associates feeling more valued when equipped with tools that help them perform effectively. This investment in technology enhances productivity and serves as a strategy to attract and retain talent, building a culture of loyalty and value among associates. By prioritizing technological integration, retailers can create a more efficient and supportive work environment, ultimately driving improved performance and profitability across all retail functions.



The Great Workforce Dilemma: Challenges Retail Leaders Can't Ignore

Decision-makers agree:

83% 
Hiring / retaining qualified store staff is a significant challenge

80% 
Upskilling / reskilling current store staff is a significant challenge

85% 
Operation managers are spending too much time managing the workforce

Regional Realities: Task Overload and Complexity is High Across the Globe

79% of associates feel stressed by the increasing complexity of their daily responsibilities

74%
Asia Pacific

81%
Europe

83%
Latin America

78%
North America

Sector Struggles: Workload Pressures and Task Prioritization Hurdles

83% of associates struggle to prioritize tasks due to overwhelming workloads and competing priorities

78%
Food Retailers

84%
Mass Merchandisers

88%
Drug Retailers

82%
General Merchandisers

Technology That Inspires: How Mobile Devices Elevate Associate Perceptions

87%  +9pp since 2022

feel more valued by their employer when equipped with technology that helps them do their job

85%  +11pp since 2022

view their employer more positively because they are provided with mobile devices and technology

Empowering Associates

Driving Productivity and Retention

Retailers are increasingly equipping associates with mobile technology to address challenges that hinder efficiency and job performance. As associates juggle complex workflows, competing priorities and routine customer interactions, technology is proving to be a critical enabler. Tools like mobile apps and task automation are simplifying processes and helping associates manage their daily responsibilities more effectively. This directly impacts workforce retention, with 85% of associates agreeing that stores leveraging retail technology and mobile devices are better at attracting and retaining employees.

In addition to retention, mobile technology helps streamline the workday for associates, reducing stress and improving their ability to focus on high-value tasks. Eighty-five percent of associates now prefer managing their schedules via a mobile device or app and 86% favor task automation to simplify prioritization. These tools help associates effectively manage their responsibilities while remaining adaptable to shifting priorities. Ultimately, this creates a more productive and satisfying work environment.

Beyond individual efficiency, mobile technology strengthens collaboration across teams. With 86% of associates reporting that they prefer collaborating through a store mobile device or app—a significant increase of 15 percentage points since 2022—mobile tools are increasingly vital in team communication. This growth reflects the rising importance of equipping associates with technologies that enable them to respond quickly to customer needs and operational changes. By streamlining workflows and reducing inefficiencies, retailers enhance day-to-day operations and empower associates to deliver exceptional service that builds shopper loyalty and drives long-term success.

Streamlining Workdays with Mobile Solutions

Percentage of associates who prefer:



85% ↑ +12pp since 2021

Managing their schedule via a mobile device or app



85% ↑ +13pp since 2021

Having tasks automatically assigned instead of prioritizing themselves



86% ↑ +15pp since 2022

Collaborating with their team through a store mobile device or app

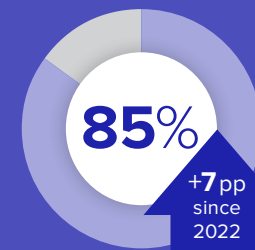
Mobile Devices in Action: Delivering Better Service and Saving Time

Associates highlight the benefits of mobile devices

- 1 Answer a customer question
- 2 Provide a coupon or discount for a customer
- 3 Improve customer shopping experience
- 4 Find the correct price
- 5 Order out-of-stock item anywhere in the store
- 6 Checkout customers in the register line
- 7 Save the customer time



Tech That Retains: Mobile Solutions Boost Associate Loyalty



of associates agree stores that leverage retail technology and mobile devices attract and retain more associates

Strengthening Connections

Supporting Work-Life Balance Through Technology

Work-life balance is associates' top priority and technology plays a critical role in supporting this need. Retailers are making strategic investments in tools that empower associates to manage their responsibilities efficiently while reducing stress. These tools—like mobile point-of-sale devices, barcode scanners, handheld computers and rugged tablets—simplify workflows and enable associates to focus on meaningful tasks that create shopper value.

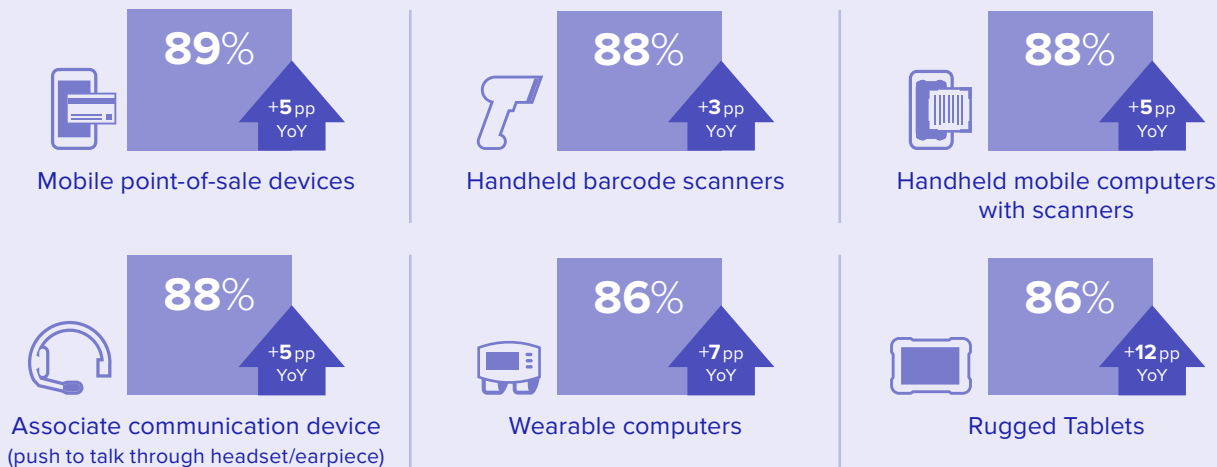
The findings are compelling: 89% of associates agree that mobile point-of-sale devices enhance the shopper experience, while 88% highlight the benefits of handheld barcode scanners and mobile computers in delivering better customer service. Rugged tablets, favored by 86% of associates, have seen a significant 12-percentage-point increase in preference year over year—reflecting the growing importance of durable, versatile tools for task management. Retailers nurture more engaged and capable teams by aligning technology investments with associates' needs.

Retailers are also addressing associates' broader priorities by increasing their investments in training and technology. Nearly eight in 10 decision-makers (77%) plan to increase spending on training, while 75% are focused on boosting investments in technology to enable associates. These technologies improve workflows, help associates manage their responsibilities more effectively and address some of their daily challenges.

When associates are equipped with the right tools, they can focus on what matters most: balancing their responsibilities while delivering human-centered interactions that today's shoppers value. Retailers prioritizing these investments are positioned for sustained success in an increasingly competitive landscape.

What Associates Say: Tech Transforms Shopper Experiences

Associates agree they can provide a better shopper experience using technology



Future-Focused Investments

Investment areas where retail decision-makers plan to increase spending in 2025



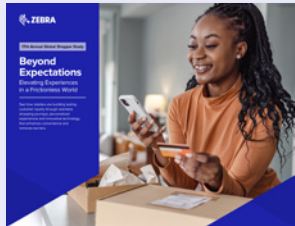
The Road Ahead

Transforming Retail with Engaged Associates and Strategic Technology

Retail decision-makers recognize that investing in mobile technology optimizes workflows and plays a critical role in attracting and retaining talent. By equipping associates with the technology and tools they need to perform effectively, retailers build a sense of value and loyalty, strengthening the employee-employer relationship. Embracing technology to improve communication and task management ultimately strengthens store operations, empowering associates to deliver a higher level of service and contributing to a more consistent, satisfying shopper experience.

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.



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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