



2023 Global Shopper Study

Beyond the Basket

What Shoppers Really Want in Their Retail Experiences



Today's shoppers view retail as a dynamic and experiential relationship that extends beyond transactions, pressuring retailers to adapt and evolve to meet their evolving needs and values.

Explore shoppers' perspectives and deepen your understanding of their priorities.

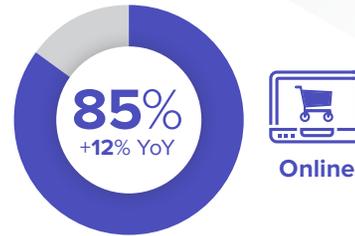
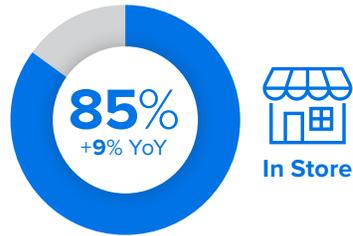
Cross Channel Shopping: Retail's Rising Tide

Market Watch

Shopper expectations have undergone a significant transformation, driven by technological advances, socioeconomic pressures and evolving consumer values.

Following global disruptions, which tested the resilience of supply chains and prompted innovation, retailers are beginning to see positive signs. As consumers increase shopping and overall satisfaction rises, retailers must prioritize seamless digital and physical experiences, varied product selection, product availability and competitive pricing to maintain this positive trajectory.

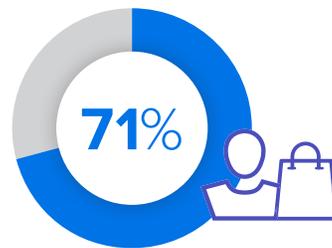
Shopper Satisfaction Climbs as Retail Boundaries Blur



Dual Destinations: Shoppers Plans Over the Next 12 Months



Blended Experiences



of shoppers say they make most of their purchases by integrating physical and online destinations

By Generation

Gen Z (Age 18+)	Millennials
69%	75%
Gen X	Boomers
77%	62%

Key Factors Driving the Path to Purchase

-  **In Store**
 **Online**
 - 1** Product Availability
 - 2** Product Selection
 - 3** Ease of Making Returns, Exchanges
 - 4** Compare Competitive Prices, Discounts, Promotions
 - 5** Discounts, Promotions Only Available In Store
- Product Availability
- Product Selection
- Comparison Shopping (Competitive Prices, Markdowns, Discounts, Promotions)
- Free Shipping
- Convenience of Shopping Anytime, Anywhere

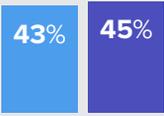
From Aisles to Applications

Shoppers are navigating the new age of omnichannel retail. The role of the retail store is continually evolving, shaped by the emergence of new technologies and consumer preferences. The modern shopping journey is made up of an intersecting network of both in-store and online touchpoints. Shoppers are using their own devices to find competitive deals, check inventory information and read product reviews whether shopping in store or online.

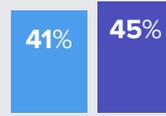
Increasingly, more shoppers are interacting with digital while in store, using flexible self-serve payment solutions such as self-checkout, auto-checkout and paying anywhere in the store. Despite their digital prowess, many shoppers lean on in-store associates to find what they want and ensure a high-quality in-store experience.



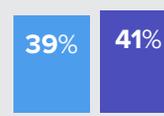
Deals, Coupons, Discounts: Savvy Smartphone Shoppers Go Deal Hunting



Use store app to apply coupons or other discounts

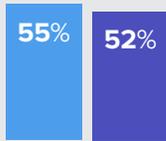


Browse online website for products

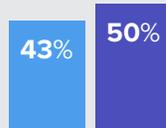


Look up, compare competitive prices, discounts, promotions

Flexible Payment Methods: Shopper Preferences Shift Toward Emerging Point-of-Sale Options



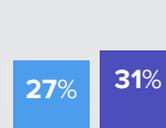
Traditional register staffed by person



Pay with mobile device



Self-checkout at register or kiosk



Associate uses a handheld mobile device

2022 2023

Personalized Service: Shoppers Voice Concern Over Sparse Store Service

want to personally interact with associates while shopping in store



are concerned about the lack of help from store associates



Enriched Shopping Experiences



82%

of shoppers agree the ability to see, touch or try products is an essential aspect of the shopping experience across age cohorts

Every Path to Purchase

Despite inventory gaps, omnichannel proves to be a successful strategy. Whether it's browsing online and picking up in store, same-day delivery, or immersive virtual shopping experiences, consumers want retailers to offer multiple frictionless ways to interact with their products. However, product availability remains the top reason shoppers leave stores without the items they want, and retailers admit maintaining real-time visibility of out-of-stocks is a significant challenge. A wider range of flexible fulfillment options, including Buy Online, Pick up In Store (BOPIS) and ship to home, help avoid shopper disappointment and more quickly connect them with the things they set out to buy.

Mobile ordering is on the rise, and retailers recognize its value in delivering on heightened shopper expectations. Opting for delivery over pickup also continues to rise, as does willingness to pay for the added convenience of quick shipping direct to the shopper's door. The ease of return processes is also becoming pivotal as shoppers prioritize hassle-free item exchanges.



Customers Are Finding More of What They Want In Store

63% **-26%**
YoY

of shoppers left a store without all the items they came in to buy, a 26% improvement from 2022

Top reasons why shoppers left a store without all the items they came in to buy

- 1 Item was out of stock
- 2 Couldn't find items on shelf
- 3 Found a better deal at another store

Shoppers' Ideal Retail Recipe

Online Meets In Store

75% **+6%**
YoY

of shoppers prefer to shop with online merchants that also have brick-and-mortar locations

Delivery on Demand

78% **+4%**
YoY

of shoppers prefer having items delivered rather than having to pick them up

Pick Up Preferences

70% **+9%**
YoY

of shoppers prefer retailers that let them pick up their items in store, at curbside / another location

Paying for Convenience

90%

of shoppers are willing to pay for shipping
+27% since 2019

Returns Persist

82% **+3%**
YoY

of shoppers prefer retailers that offer easy returns



73% of shoppers have or plan to return purchases

33% <10% of purchases

40% >10% of purchases

Mobile Ordering's Steady Ascent



85%

of shoppers have used mobile ordering



90%

of these shoppers are likely to use mobile ordering in the future

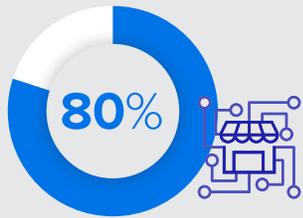
Retail's Modern Magic

Shoppers thrive with technology enhancements. Today's consumers crave tech-enabled experiences no matter where they shop or what they want to purchase. In addition to leveraging their personal devices, they are increasingly likely to embrace in-store self-service solutions, including location-based coupons and scan-and-go checkout.

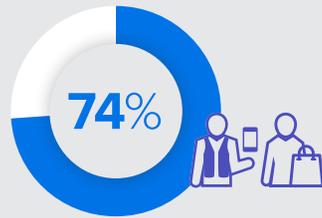
With AI dominating tech news and top of mind for many, the promise of artificial intelligence presents new possibilities for retailers and shoppers alike. As new technologies emerge, shoppers begin to expect retailers to harness the power of data and artificial intelligence to anticipate their needs, curate product recommendations and provide convenient, personalized shopping options – all while looking out for their privacy and protecting sensitive personal data.



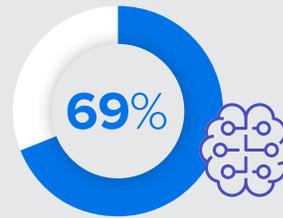
Tech-Enhanced Service: Shoppers Praise Modern Tools for Better Experience



Expect retailers to use the latest technology

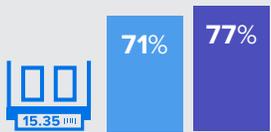


Report having a better experience when store associates use the latest technology to assist them

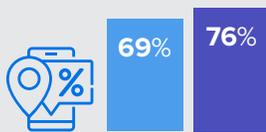


Agree artificial intelligence will improve their shopping experience

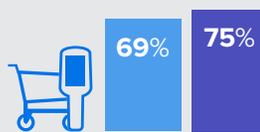
Tech Innovations Continue To Increase in Acceptance



Electronic shelf labels



Location-based coupons



Personal shopping device, scan-and-go



Auto checkout

2022 2023

The Freedom and Flexibility of Self-Checkout

75%

of shoppers agree that self-checkouts improve the customer experience

By Generation

Gen Z (Age 18+)	Millennials
85%	82%
Gen X	Boomers
71%	66%

Decoding Today's Shopper Preferences

Modern shoppers demand seamless, personalized experiences that improve the convenience of e-commerce and transcend the capabilities of traditional brick-and-mortar stores. New consumer attitudes prioritize convenience and flexibility in addition to growing preferences for retailers who engage in environmental, social and corporate responsibility actions to make a positive impact. Retailers that understand and adapt quickly to these evolving expectations will be better positioned to thrive in a dynamic and competitive marketplace.

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 2023 Global Shopper Study reports on the attitudes, opinions and expectations shaping the industry's future. The series focuses on three key themes:



Beyond the Basket
What Shoppers Really Want
in Their Retail Experiences



Elevating Retail Experiences
Empowering Associates to
Enrich Customer Interactions



Meeting Retail's Modern-Day Mandate
New Fundamentals for
Tomorrow's Priorities

To view the entire 2023 Global Shopper Study series, visit zebra.com/shopperstudy

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.

Explore how Zebra can assist retailers in enhancing profitability while elevating shopper and associate experiences. Visit zebra.com/retail



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