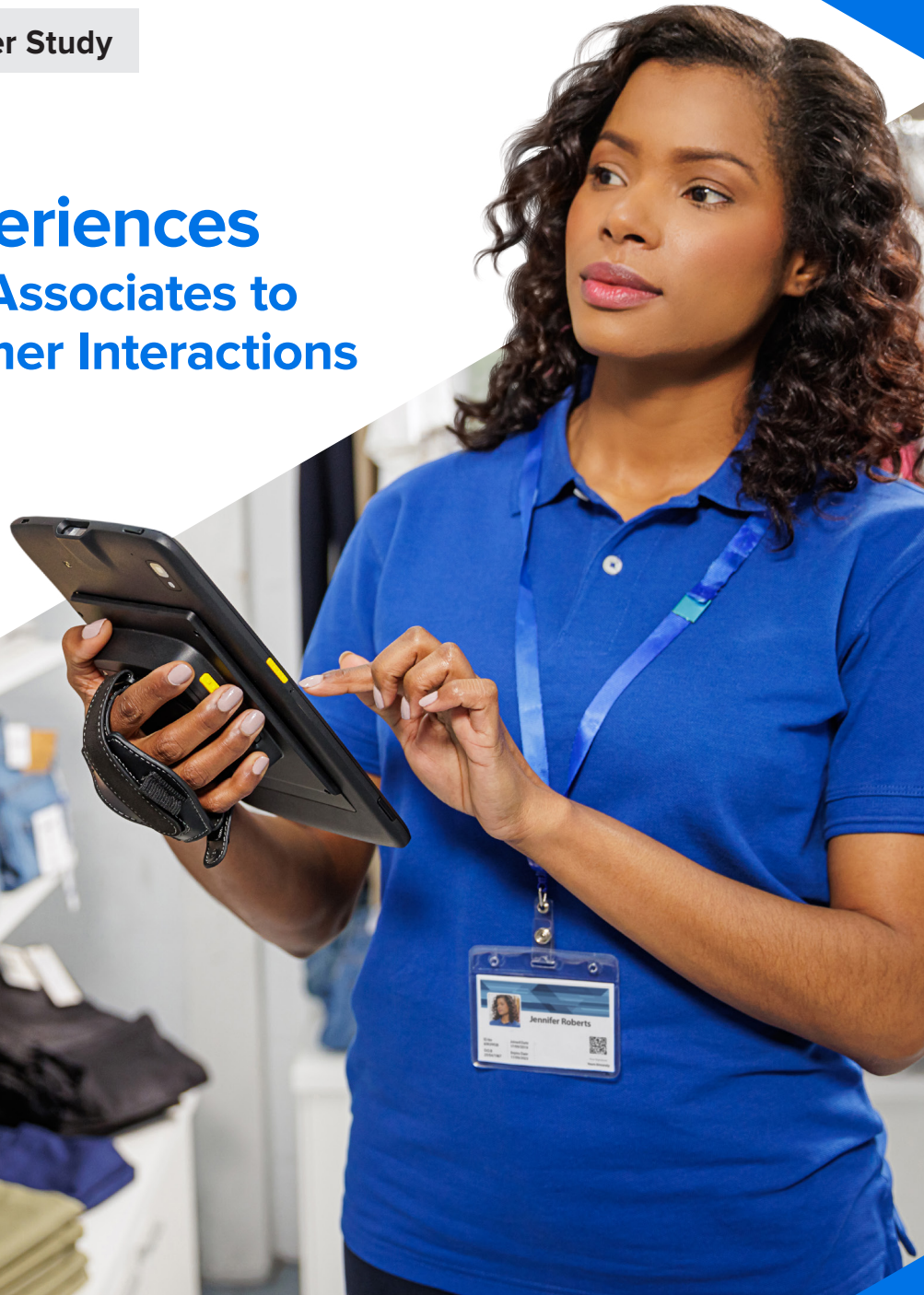




2023 Global Shopper Study

# Elevating Retail Experiences

## Empowering Associates to Enrich Customer Interactions



Associates are crucial in shaping customer experiences, delivering satisfaction and improving overall store performance. Retailers are harnessing technology to help speed up training, build more supportive work environments and enhance the overall effectiveness of their associates.

**Examine the impact of  
tech-empowered associates  
on the retail experience.**

## Pivotal Navigators in the Omnichannel Journey Voice Concerns

(of associates)

### Shoppers' Information Access Outpaces Staff

**77%**

say that **shoppers are better connected to information than store associates**

+15% since 2022 | +40% since 2019



Food Retailers

**60%**



Mass Merchandisers

**81%**



Drug Retailers

**82%**



General Merchandisers

**77%**

### Alarmed About Inadequate Inventory Tools

**81%**

say their **company needs better inventory management tools to improve accuracy and availability**

+7% since 2022



Food Retailers

**79%**



Mass Merchandisers

**78%**



Drug Retailers

**82%**



General Merchandisers

**85%**

### Confronted with Frequent Returners and Reverse Logistics Challenges

**56%**

say their **store offers online returns, cite key issues**



Frequent Returners

**74%**



Reverse Logistics

**63%**



No Dedicated Area for Order Pick Up/Return

**40%**

### Transformed: A New Era in Retail Innovation



**93%**

concur mobile ordering helps meet shopper expectations



**85%**

believe artificial intelligence will help them be more productive



**83%**

say it's important to work for a socially and environmentally responsible retailer

## Market Watch

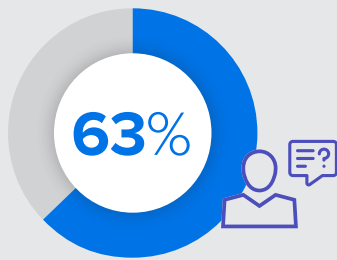
As shopper expectations evolve, they introduce new challenges for retailers, spotlighting associates' critical role in this shifting landscape. Retail associates are essential in connecting the digital and physical realms, adapting to offer personalized, seamless service amidst varied customer preferences. Their expertise ensures the convenience and customization shoppers expect in an omnichannel world.

# Empowering the Personal Touch: Elevating Retail Experiences

When equipped with the right tools and training, associates can answer questions, solve problems and offer recommendations tailored to individual customers. Great customer service can be the magic touch that influences the overall retail experience, driving customer loyalty. However, today's shoppers are concerned about a need for more in-store help and associates voice frustration with lower-level tasks impairing their ability to provide value-added services to customers. While the presence of retail associates offers a personalized touch that technology alone cannot yet replicate, deploying leading-edge technology can help enable a higher level of service across touchpoints.



## Understaffing in Stores Doesn't Go Unnoticed



of shoppers report concern over lack of in-store assistance

### By Generation

Gen Z (Age 18+)	Millennials	Gen X	Boomers
<b>71%</b>	<b>66%</b>	<b>56%</b>	<b>63%</b>

## Associates Share Frustrations

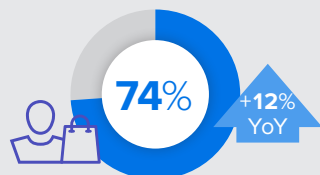
(among those working in-store sales or customer service)

- 61%** Agree little time to help customers because doing lower-level tasks
- 48%** Cite inadequate tools to provide personalized customer service
- 47%** Report customers find price, product information faster on their smartphones than associates
- 41%** Name out-of-stock complaints

## Game-Changers in Delivering Stellar Service

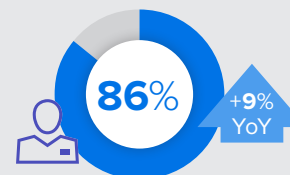
**80%+** of associates report they can provide a better customer experience using handheld barcode scanners, mobile point-of-sale devices and self-serve checkouts

## Associates and Shoppers Alike Applaud Technology's Role in Enhancing Customer Experience



Shoppers

Agree customers have a better experience when associates use the latest technology to assist them



Associates

# Tech Triumph: Overcoming Staffing Hurdles, Boosting Retail Profits

**Retailers are facing intensified challenges in staffing and maintaining profit margins.** A significant 84% of decision-makers find hiring, training and retaining skilled store staff difficult, a sentiment amplified by the struggle to balance enhanced employee compensations with profit preservation. Among these concerns, technology stands out as a critical solution.

The advent of self-checkouts is supported by both associates and decision-makers, noted for reallocating staff to higher-priority tasks and enhancing the customer experience. A notable percentage of the retail workforce acknowledges the positive ROI due to this tech integration. In addition, tools like real-time inventory visibility are gaining recognition among associates for bolstering efficiency and customer service, signaling a shift towards a more technologically integrated and profitable retail landscape.



## Tech Investments Pave the Way for Long-Term Store Profitability



Associates

**86%**

Self-checkouts have freed associates to do higher-priority tasks and better serve customers



Decision-Makers

**88%**

**85%**

Self-checkouts improve customer experience

**88%**

**84%**

Self-checkout investments are paying off / seeing positive ROI

**87%**

## Associates Highlight Tools Boosting Efficiency and Customer Service



**85%**



+5% YoY

Real-Time Inventory Visibility



**82%**



+12% YoY

RFID



**82%**



+12% YoY

Electronic Shelf Labels



**78%**



+16% YoY

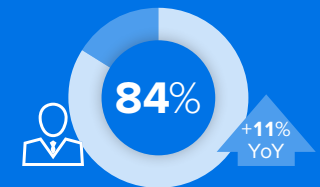
Artificial Intelligence / Machine Learning



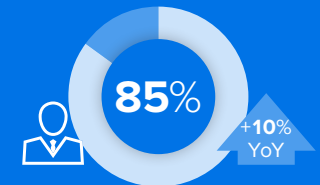
**75%**

Generative Artificial Intelligence

## Staffing Struggles Intensify Retailers' Profit Margin Concerns



Hiring and retaining qualified store staff is a significant challenge



Maintaining profit margins while meeting workforce expectations for increased salary and benefits has been difficult for their organization

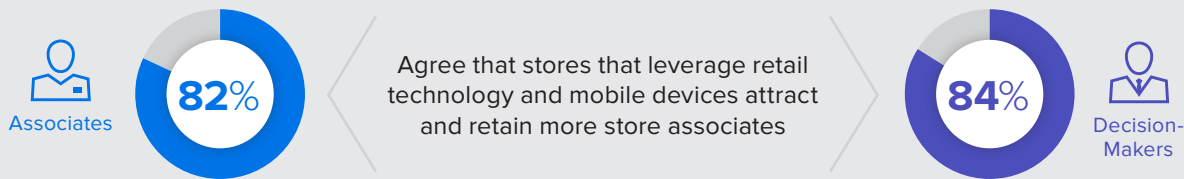
# Decoding the Workforce Conundrum

**Attracting and retaining tech-savvy talent for the digital age.** In the ever-evolving labor market landscape, attracting and retaining skilled talent is a notable challenge for retailers. The industry's demand for a diverse skill set, encompassing customer service, product knowledge, digital literacy and adaptability, compounds this ongoing issue. As e-commerce grows, the demand for tech-savvy workers who can navigate online platforms and successfully leverage leading-edge technology to complete tasks like inventory counting and fulfill orders efficiently has also increased.

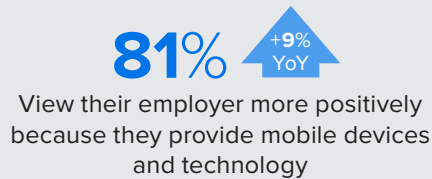
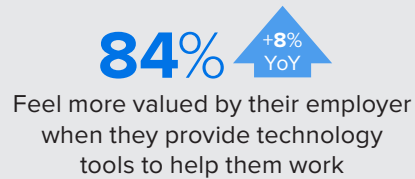
Associates increasingly recognize the positive impact of devices and analytics to prioritize their work tasks and collaborate with teammates. The deployment of task and workforce management software is expected to sustain continued growth.



## Associates and Management Applaud Tech's Role in Staffing

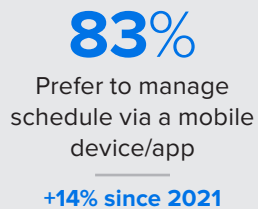


## Associates Feel Esteemed with Advanced Technology Tools at Work



## Digital Harmony: Enhancing Work-Life Balance

(associate preferences, % agree)



\*Question not asked in 2021

## Flexible Workforce Management Solutions are on the Rise

(% of decision-makers that plan to deploy over the next 5 years)



# A Glimpse into the Future of Retail's Workforce

Retail's dynamic labor market encompasses the broad spectrum of omnichannel associates, reflecting the ever-evolving nature of the industry. The ongoing need for a versatile and customer-focused workforce is paramount as the shopping landscape diversifies. While associates, whether in store or behind the digital interface, play an essential role in the customer experience, many are bogged down by lower-level tasks, hindering their ability to deliver the ultimate shopping journey. The personal touch of associates remains irreplaceable, yet leveraging cutting-edge technology can significantly enhance operations, bridging the gap between physical and online realms and creating efficiencies across the business. Adapting to this intricate labor market and the technology-driven era is essential for retail 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 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](https://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](https://zebra.com/retail)



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