



The Retail Imperative: Empower Associates, Exceed Expectations and Create Loyal Customers

13TH ANNUAL ZEBRA GLOBAL SHOPPER STUDY - VOLUME 2



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Read Zebra's Global Shopper Study in Two Volumes



Shoppers

Focuses on shifting shopper expectations and experiences



Retailers

Analyzes retailer's technology plans to meet the now of retail



1-Minute View

Change is the only constant, and retail has seen plenty of it. The COVID-19 pandemic forced this already fast-moving sector to evolve at an unprecedented pace to overcome challenges, meet consumer demand and help support a new world. The adversity accelerated innovation, growth, new experiences and faster fulfillment. It accentuated the value of the industry and the critical role store associates play in keeping shelves stocked, assisting customers and cultivating a safe shopping experience.

Many retailers, especially those deemed essential, have had to quickly adjust to meet sky-rocketing customer demands and increased expectations to deliver a better shopping experience. Customers are still craving the essentials: speed, convenience and now safety with frictionless checkouts, accurate pricing, item availability and blended in-store and online experiences.

It's become clear that retailers must embrace a digital mindset to deliver the essentials and meet customers where, when and how they shop. Retailers are equipping associates with technology that gives them inventory visibility, insightful analytics and store layouts. These tools enable them to deliver better experiences, create a loyal customer base and solidify their standing, and their future, in the industry.

Retailers accelerate tech investment and implementation plans

61% of retail executives say the pandemic accelerated technology investment plans

77% say the pandemic accelerated implementation plans for devices and solutions

61% of associates view their employer more positively for providing them with mobile devices and technology +10pp YoY

+pp denotes the year-over-year (YoY) percentage point increase

Zebra's 13th Global Shopper Study surveyed over 5,000 global shoppers, store associates and retail executives to gauge the attitudes, opinions and expectations of retail now. The results, summarized in a two-part series, are essential reading for industry leaders seeking actionable insights to serve today's tech-savvy and safety-conscious shoppers.

Market Watch: Associates Are Speaking and It's Time to Listen

As a retail executive you recognize the value your associates bring to the floor and back of store. These colleagues possess valuable insights about your shoppers because they have the benefit of interacting with them in the most fundamental ways. Listening to them provides you with a distinct advantage when it comes to providing the types of experiences that will build customer loyalty and cement your status as a leader in the industry.

So, what are associates saying?

Store associates recognize the value of technology and how they could give every shopper exactly what they want if they were equipped with the latest retail solutions.

Most associates are clamoring for access to mobile devices. Why? Because the right tools will help them unify the experience between in-store and online, balance productivity with customer engagement and take the right action at the right time. Technology is also the key to allowing them to spend more time with customers and offering an increased level of personalization.

While retail executives and associates agree that technology is critical to success in retail, a trust gap between them still exists.

A Difference in Opinions: Executives and Associates Don't Always See Eye-to-Eye



Retail Executives



Associates

Trust Stores are adequately staffed

88%

69%

Trust adequate training provided to handle increase in online orders/returns

89%

71%

Agree Workloads are manageable

86%

71%



While retail executives and associates agree that technology is critical to success in retail, there's still a need to close gaps in workplace issues.

Retailer Viewpoint: How to Catch up to Consumers

Sometimes it seems like shopper's behaviors change overnight—and once the pandemic hit they did. There has been a dramatic uptick in the amount of people who utilize curbside/drive-up pickup and online. Smart retailers have met these changes head-on by accelerating their digital transformation plans.



Over seven in ten retail executives have already or plan to implement employee texting, smartphone self-checkout and personal shopping this year as shoppers' affinity for in-store tech continues to grow.

It makes sense, especially since associates' time and expertise has never been more in demand. Equipping associates with technology that provides them with real-time access to inventory, prescriptive analytics and the ability to switch seamlessly between roles enhances the shopping experience, increases employee efficiency and optimizes your costs.

Top 3 most important and valuable uses of technology according to associates:

- 1 Price checks
- 2 Accessing inventory
- 3 Scanning bar codes

Staying safe in store

Safety has taken on a new meaning. Where retailers used to focus on mitigating slips, falls and other bodily injuries, they're now faced with the public's demand to for adequate space to avoid other customers throughout the store. Associates and decision-makers agree utilizing technology can help provide a comfortable experience, however, there's a disconnect between the two sides over their current safety protocols.

Our store makes health and safety a priority

- 91% of retail executives agree 77% of associates agree



The future of tech in retail

The future of retail is tied to technology, but what technology do retail executives believe are the most important solutions over the next five years?

Top 10 Emerging Technologies for 2025

- 83% Workforce Software
- 82% Smart Check-Out
- 81% Prescriptive Analytics
- 80% Employee Experience Technologies
- 80% Advanced Order Fulfillment/Management
- 80% Distributed Order Management
- 80% Real-Time Store IoT Platform
- 79% Ultrahigh Frequency (UHF) RFID
- 78% Live Commerce
- 76% Unified Commerce Ecosystem

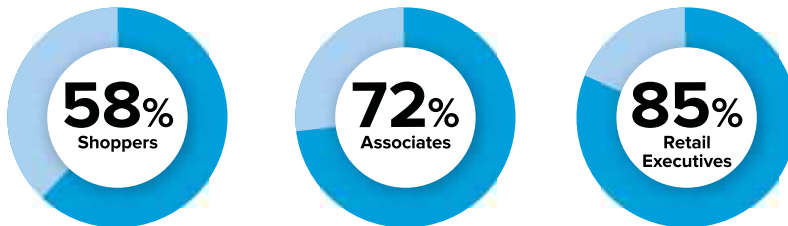


Enable Associates To Bring Their Collective Best

It's a simple truth: associates are the face of retail. Great shopping experiences happen because associates provide excellent service and enjoyable interaction, all of which play a huge factor in your customers' likelihood to return to your store.

Investing in your associates goes a long way towards building that loyal customer base your business needs to thrive. Providing the right technology and training not only enhances their ability to perform, it shows them that they are valued members of the team, giving them the tools to spend less time on low-value tasks and more time with customers.

Shoppers, associates and decision-makers agree tech-empowered associates provide better experiences



Mobile devices make all the difference for associates



Associate frustrations that could be mitigated with technology:



Out-of-stocks



Price Checks



Replenishing products after getting complaints vs. being proactively informed



Less time to help customers because of low-level tasks



The Future Has More in Store for Associates

Retail is evolving and it's creating more career paths throughout the industry. In the future, you can expect to see more reliance on store associates as well as growing areas of specialization that will lead to new roles such as:

- **Virtual Specialist:** A true expert on products and brands who will be available to help customers virtually via augmented reality. These specialists could work in any store in the world, assisting shoppers across the globe from the touch of a button.
- **Safety Associate:** Someone who highlights safety procedures to customers as they enter the store. Safety requirements may change frequently over the coming months and years and these will need to be communicated to customers and staff.
- **Livestreamer:** Livestreaming shopping events via social media channels are driving huge sales volume in China and this trend is expected to make its way across the globe. In-store specialists who have a blend of product expertise and presenting skills could be introduced to host these types of events.
- **In-Store Logistics Manager:** Stores will continue to increasingly become fulfillment hubs/microfulfillment centers as online growth accelerates. A specialist role would be required to oversee the complex logistical issues of managing in-bound deliveries, space requirements and front-of-house delivery.

The realities of working in retail

[Find out](#) about the realities of working in retail by reading [Talking Shop](#), a special report featuring insights from 500 retail store associates. This report is from [Retail Week](#) and [Retail Trust](#) in partnership with [Reflexis](#), now part of Zebra Technologies.

*Research is based on original survey conducted September/October 2020 in the United Kingdom.

The Omnichannel Challenge

The omnichannel surge has amplified challenges for retailers. Executives are struggling to maximize profits from services customers demand like online ordering, delivery and curbside pickup. Additionally, associates continue to seek out new ways to balance serving customers with picking/fulfilling online orders in-store. It's become a real conundrum because shoppers won't give up their options, but retailers can't keep eating the associated costs.

So how can retailers manage their largest expense without sacrificing the shopper experience, or worse, alienate loyal customers? By optimizing workflows, helping employees to work more efficiently and enabling their operations to fulfill orders faster.

Nearly three-fourths of Retail Executives are under pressure to reduce the expenses of online orders.

Powering productivity and protecting profitability

Real-time inventory visibility can eliminate the dreaded "out-of-stocks" and empowers associates to be proactive while keeping customers informed and happy. In fact, 41% of shoppers say they've left a store without making a purchase because one or more of the item's they wanted wasn't in stock. Imagine the positive impacts on your operations if you could end out-of-stocks.

Overcoming out-of-stocks



Retail Executives



Associates

70%

agree maintaining real-time visibility of out-of-stocks is a significant challenge

83%

80%

agree they need better inventory management tools for accuracy and availability

64%



The future is data-driven

Retailers capture data in more places than ever, but they've reached information overload. The challenge has gone from collecting this knowledge to deciphering it and turning it into actionable insights.

Retail executives and associates are more than ready for it, in fact, associates feel this additional layer of technology will even make their jobs more satisfying.

Retailers are integrating digital intelligence across all aspects of their operations

86% in supply chain, ↑ 7pp YoY

86% in loss prevention

82% in merchandising

83% in store operations

↑ pp denotes the Year-over-Year (YoY) percentage point increase

Helping Shoppers and Associates Be More Efficient and Safe

There's a growing number of shoppers consistently using technologies such as self-checkout and scan and go, and mobile apps, and they say that they're likely to keep using them in the future. Interestingly enough, self-service hasn't diminished the value of the store associate, quite the opposite, it's allowed them to shine by giving them more time to focus on performing high-level tasks. It's a win-win.



The self-checkout story



Retail Executives



Associates

Self-checkouts help us meet health and safety protocols

86%

72%

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

88%

74%

Self-checkout investments are paying off

86%

68%



Mobile ordering matters to shoppers, associates and decision makers



64%

of shoppers say more retailers need to offer mobile ordering



83%

of associates say mobile ordering would help meet customer expectations



90%

of decision makers say mobile ordering would help meet customer expectations

Regional Findings



North America

- **68%** of retail executives accelerated the implementation of devices and solutions over the past year, the lowest of any region
- **34%** of associates are concerned about being replaced by technology, the lowest of any region



Europe and Middle East

- **83%** of retail executives accelerated the implementation of devices and solutions over the past year, the highest of any region
- **67%** of retail executives believe the use of robots would augment work for associates, the lowest of any region



Latin America

- **81%** of associates would view their employer more highly if provided with devices and technology, the highest of any region
- **75%** of associates prefer to have their tasks prescribed to them, the highest of any region



Asia-Pacific

- **65%** of associates prefer to have their tasks prescribed to them, the lowest of any region
- **52%** of associates believe the use of robots would augment work for them, the highest of any region

Investing in Your Associates Pays Huge Dividends Throughout Your Operation

Retail has changed and your associates are still your greatest asset. They are the keepers of your brand, the ones you depend on to deliver the seamless, enjoyable experience that creates loyal customers. You can maximize their impact with the tools that minimize their lower value tasks so they can focus more on customers. Tech optimizes their time, powers them to elevate their role, their efficiency, and the entire customer experience. Investing in this type of technology is a game-changing decision that can help you cement your place in the industry for years to come.



You've got this. You've got Zebra.
[Learn more at zebra.com/retail](https://zebra.com/retail)



About Zebra

Zebra (NASDAQ: ZBRA) empowers the front line of business in retail, manufacturing, transportation and logistics, healthcare and other industries to achieve a performance edge. We deliver industry-tailored, end-to-end solutions that intelligently connect people, assets and data to help our customers make business-critical decisions.



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Key takeaways



Retail associates believe they can elevate the shopping experience and build a loyal customer base by using the latest technology to enhance their service



Associates and shoppers are most frustrated by out-of-stocks and both believe it is critical for stores to deliver on the basics of speed, safety, convenience and product availability



Self-serve technology is here to stay and it's allowing associates to spend more time focusing on high-value tasks and customer service



Empowering associates with the right technology marries your customer experience strategy with profitability, improves associate productivity, efficiency morale, delights shoppers and ultimately drives results