



# The Essential Shopper Experience: Safety, Speed and Convenience

13TH ANNUAL ZEBRA SHOPPER VISION STUDY – VOLUME 1





## 1-Minute View

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While the world and the retail industry have been rocked by the market disruption resulting from Covid-19, shoppers' basic motivations haven't changed. Shoppers still expect the items that they want to be readily available at the best value with transactions that are a breeze. However, many retailers are struggling to deliver on these expectations.

Safety has become the new standard as shoppers demand a blending of the online and in-store experience. The pandemic exposed and amplified retailers' existing challenges, but from crisis comes opportunity and retailers can meet the moment by delivering on shopper expectations with technology.

Zebra's 13th annual shopper vision study surveyed over 5,000 shoppers, store associates and retail executives globally to gauge the attitudes, behaviors and expectations impacting both brick-and-mortar and online retail. The results, summarized in this first volume of the 2021 Shopper Vision Study, are a must-read for retail leaders seeking to turn insights into opportunities.

### Shopping in-store or online is interchangeable to today's shopper

Motivations for channel choice now similar

	In-store	Online
Product availability	54%	56%
Product selection	46%	48%
Price Comparison	37%	42%

Shoppers are savvy, and flexible. If they can't get an item in-store, they'll head online or vice-versa, leveraging both channels for the most basic of reasons: product availability, selection and price.

Interestingly, the importance of instant gratification, the ability to "buy it now" for in-store and the availability of "free shipping" online, ranked lower this year, leveling shopper motivations for each channel.



## Market Watch: A Catalyst for Change

"The customer is always right" will always hold true in retail. But today, right has been redefined by COVID-19 and its impacts on the industry; it's the latest catalyst for total digital transformation in retail, catapulting shopper's usage of and affinity for technologies like mobile ordering and smart-check out solutions.

Although shoppers' continue to move to online and mobile, in-store shopping is still alive and necessary for retailers to provide a seamless omnichannel shopping experience. Customers expect safe, convenient and integrated experiences from retailers wherever and however they shop. Retailers need to fully digitize and optimize to adapt to shoppers flexible shopping habits.

While retailers may believe they're delivering on shopper expectations, our survey reveals a disconnect. Shoppers are markedly less satisfied with retailers than retail executives believe.

Pain points for shoppers from returns to out of stocks have increased. The omnichannel strain on retailers is showing as they struggle to meet the expectations of an on-demand world. As shoppers shift to a digital and safety-first mindset, retailers are moving to adopt innovative technology at a remarkable speed.

### Six-in-ten retail executives say the pandemic accelerated technology spending plans

Retail-relevant technologies, from a device in every associates' hand to intelligent automation and prescribed actions will no longer be trend-setting differentiators, but essentials to effective retail.

The bottom line is that retailers who embrace and invest in these technologies will not only be positioned to meet shopper expectations for safety, efficiency and convenience, but to also close the trust gap that exists between shoppers and retail executives.

#### Perception Gap: Trust level for safety



**91%**

Retail Executives



**65%**

Shoppers



#### Perception Gap: Overall In-Store Satisfaction



**76%**

of shoppers are satisfied

↓ 6pp year-over-year



**90%**

of retail executives believe shoppers are satisfied

↑ 8pp year-over-year

## Shopper View: Recapture the Retail Fundamentals

The world of retail and shopping has been turned upside down. With it, overall shopper satisfaction has dipped year-over-year for both in-store and online shopping:

### Shopper Satisfaction by Channel Year-Over-Year

In-store	
Overall in-store Satisfaction <b>76%</b> ↓ 6pp	Product availability <b>74%</b> ↓ 11pp
Product selection <b>73%</b> ↓ 8pp	Ease of finding correct prices <b>67%</b> ↓ 6pp
Online	
Overall online satisfaction <b>73%</b> ↓ 5pp	Delivery timing <b>66%</b> ↓ 6pp
Returns or Exchange by mail <b>52%</b> ↓ 3pp	Delivery cost <b>54%</b> ↓ 8pp

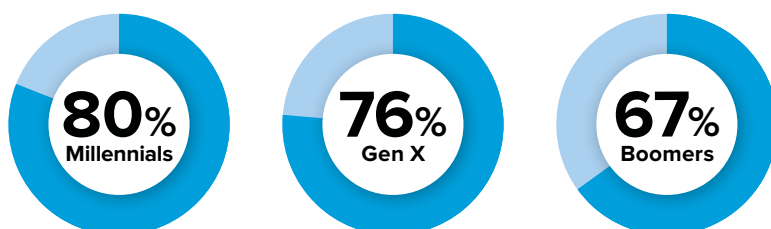
Fast, easy and flexible shopping—retail basics—drives shopper satisfaction. The pandemic has only increased these expectations and shopper preferences.

### Speed and Ease Top Shopper Preferences

- Over three-fourths want to get in and out of the store quickly
- Seventy-six percent prefer retailers that offer easy returns
- Nearly two-thirds prefer to shop with online retailers who have physical locations, +7pp year-over-year

### A digital-and safety-first mindset

74% of shoppers report technology as a benefit, agreeing it helps retailers provide a safe, comfortable and convenient experience.



### The future looks bright for self-service and contactless technology

Shoppers using in-store solutions grows and shoppers indicate that they plan to continue their usage of self-checkout, cashless payment and personal shopping devices.



**63%**

agree self-checkout solutions improve the customer experience

### Shoppers current and future use of self-service solutions



**47%** have used **self-checkouts**

(↑ 7 YoY) and **91%** say they will continue using in the future



**29%** have used **cashless payment**...**89%** will use in future



**22%** have used **personal shopping device**... **88%** will continue using in the future



## Channel Surfing: Shoppers Switch Between Clicks and Bricks

Shoppers have connected the lines between in-store and online activities with everything from click-and-collect and returning online purchases in-store to checking in-store inventory before heading in-store.

### Shoppers Increase Online Activities Year-over-Year

**57%** Placed an order for store delivery  
↑ 13pp

**45%** Looked up store information  
↑ 14pp



**29%** Checked inventory of product before visiting store  
↑ 10pp

And, while shopping in-stores, shoppers bring the online world along through their smartphones in a big way.

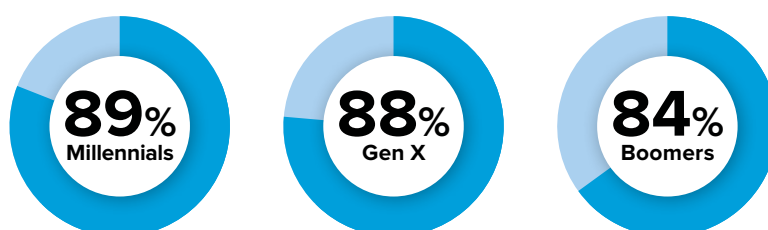
### Mobile moves up on shoppers' lists

Mobile ordering—from smartphones and tablets—has experienced tremendous growth—especially grocery delivery apps. It's been key in helping to maintain social distancing and adherence to local guidelines. Shoppers express they are likely to keep using mobile ordering in the future, indicating it's a habit that's here to stay.

### Shoppers usage of Mobile Ordering and Grocery Delivery Apps

	Current usage	Likely to use in the future
 Mobile Ordering	<b>72%</b> ↑ 5pp YoY	<b>82%</b>
 Grocery Delivery App	<b>54%</b> ↑ 11pp YoY	<b>88%</b>

The likelihood to continue using mobile grocery delivery apps in the future is high across generations:



### The best of both worlds

Retailers must combine the best of in-store and online retail to align with how their customers shop. This is underlined by shoppers' purchasing and delivery preferences, where home delivery stands out as the top priority.

### Top three shopper preferences for purchases and deliveries

- 1** Buy online and ship to home
- 2** Buy in-store and ship from store when large item or out-of-stock
- 3** Buy online and pick up in-store

**84% of shoppers are willing to pay for delivery speed, up +8% YoY.**

## What's in Store for Shoppers?

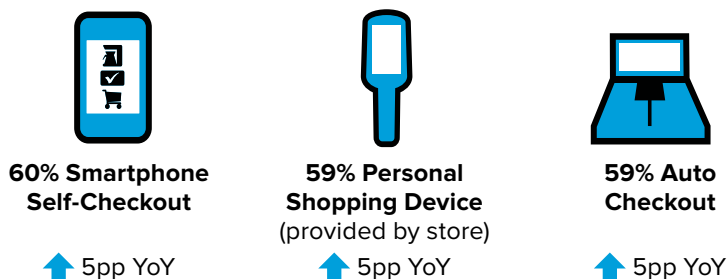
COVID-19 has influenced customer sentiment making safety a high priority. While the majority of shoppers surveyed (58%) prefer to shop in stores rather than online several key shopper concerns have emerged.

### Shopper in-store concerns:

- 67% surfaces are not sanitized/social exposure
- 60% Long wait times to enter store or check out
- 54% Lack of self-checkouts lanes or contactless checkouts
- 51% Lack of contactless payment methods

Shoppers' use of in-store tech has grown along with their concerns for safety and convenience.

### Six in ten shoppers are likely to use in-store tech

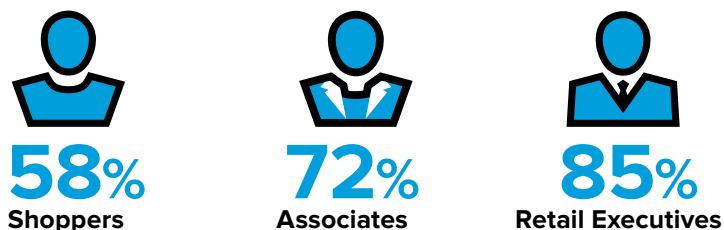


### Tech enabled associates: retail's key to sustaining success

There's no substitute for personal service—except personal service optimized by technology. It's the key that keeps customers coming back again and again and it benefits associates too:

- 85% of associates say technology helps them provide a safe, comfortable and convenient experience for customers
- Associates cite checking price (56%) and inventory (52%) as the most important and valuable uses of technology
- 61% of associates view their employer more positively for providing them with mobile device and technology

### Everyone agrees customers have better experiences when associates use the latest technology to assist them:

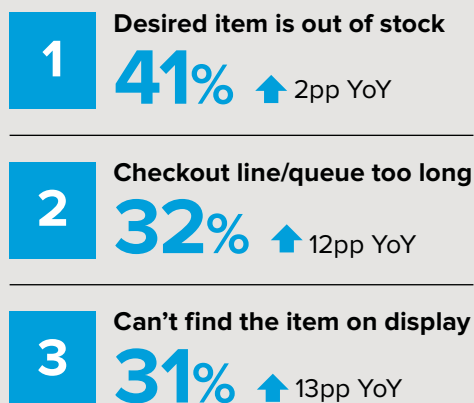


## Room for improvement

Inventory issues continue to challenge shoppers and associates alike.

Nearly 8 out of 10 associates agree real-time inventory visibility would help them provide a better experience.

### Top three reasons shoppers leave a store without making a purchase



### Is there room for automation in retail?

Store associates express concerns that robot technology could make their jobs obsolete:

- 44% of store associates are concerned about being replaced by a robot, ↑ 12pp YoY
- 70% of retail executives feel robots can augment associates workflows

## Technology Leads the Retailer Response to Shoppers

In pursuit of the hybrid retail models shoppers expect, retail executives are pushing forward with a wide variety of technologies to meet shopper demands for faster, safer and easier purchasing and delivery.

More than 80% of retail executives view smart checkout, workforce software and prescriptive analytics as key emerging technologies, addressing:

- **Ecommerce Surge**—57% of shoppers placed an online order in the past three months
- **Returns and Exchanges**—more than one-fifth of shoppers return an item purchased online
- **Associate workflows**—57% of associates feel significantly challenged by these returns

How else will retailers look to technology to meet shoppers' expectations for a seamless and safe experience?

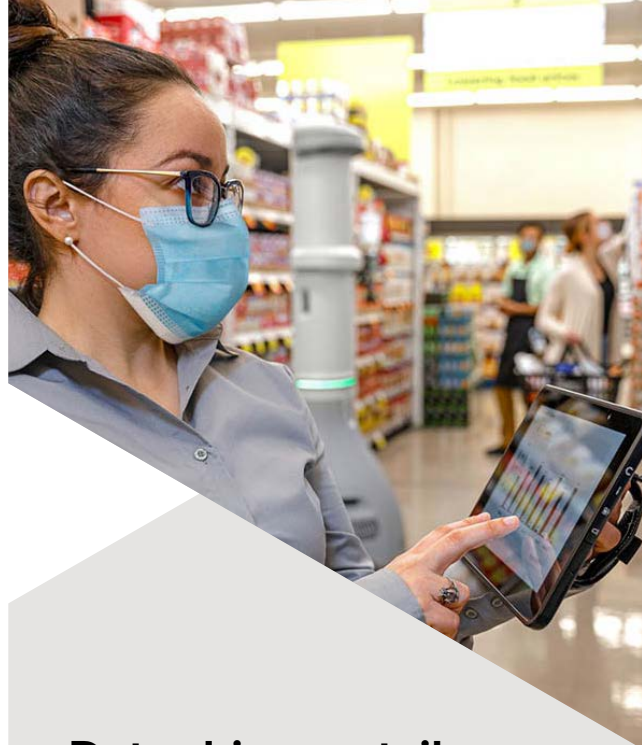
### Looking ahead



Learn more insights in Volume 2  
of the 2021 Zebra Shopper Study:  
**The Retail Perspective**

#### Read more about:

- Technologies that elevate the shopper experience
- How to drive a profit with omnichannel
- Task management that frees associates up for higher value work
- Acting on analytics



## Data-driven retail

Emerging information-based technologies top the list of priorities for retail executives over the next five years.

### Top emerging technologies through 2025



**Workforce Software**

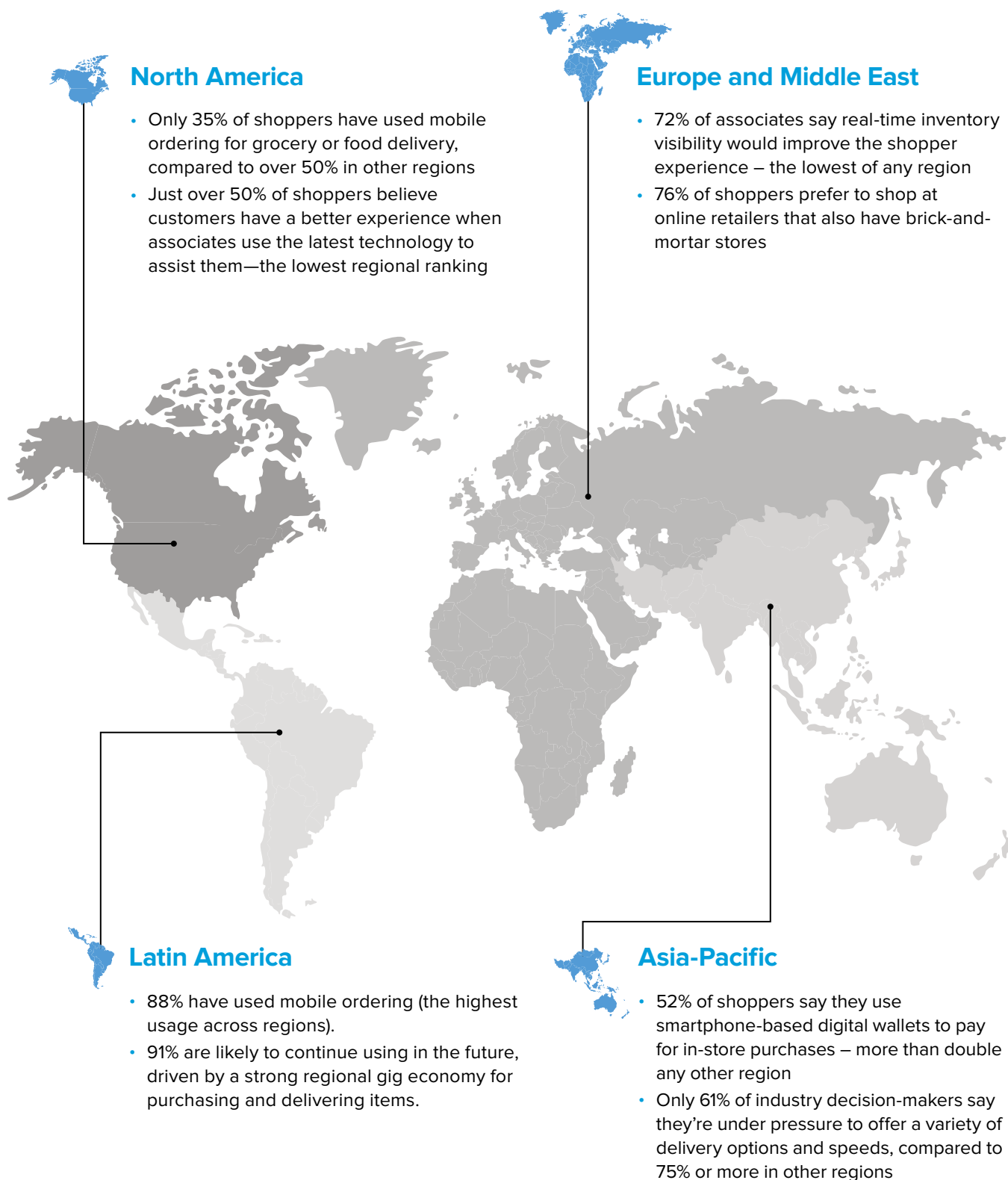


**Smart Check-Out**



**Prescriptive Analytics**

## Regional Findings





## Smarter, Safer, Synchronized Retail

Shopping has changed forever and the entire experience has been transformed. You can bet that retail will continue to evolve and its future relies heavily on the types of technologies retailers will deploy to meet customers' demands. The industry has progressed rapidly over the past few months, but shoppers are telling us that the fundamentals remain the same. Safety, seamless synchronized experiences, product availability and accurate pricing rank as the most important things to shoppers, but the ways retailers deliver them will change based on the latest innovations.



**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.

## Key takeaways:



Shoppers value the basics of convenience, speed and product availability above all else regardless of if they're shopping in-store or online



Shopper satisfaction across channels is declining. They want a seamless blend of in-store and online shopping across purchasing, delivery and returns



Empowering associates with technology will allow them to provide the basics shoppers expect, elevate the experience and close the trust gap



Shoppers have grown increasingly comfortable using self-service technology to create a more convenient, frictionless and safe shopping experience



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