



## 2019 Shopper Vision Study Executive Brief

Consumers and retailers generally agree about what needs to be done to improve shopper satisfaction. However, Zebra Technologies' 2019 Shopper Study reports retailers' speed of innovation sometimes struggles to keep up with consumer expectations in key areas, including fulfilment options and the technology available to in-store associates.

Zebra's 2019 Shopper Vision Study reports on the attitudes, opinions and expectations of shoppers, retail associates, and retail decision makers—across topics of shopper experience, device usage, transformative technologies, delivery and fulfilment, and more—in both areas of in-store and online.

Key report takeaways summarised below demonstrate how and why today's retailers must accelerate the pace of change or risk losing sales and market share. In an on-demand world, using technology to improve the online and in-store shopper experience becomes crucial to future success.

Zebra's 11th annual Shopper Vision Study included approximately 4,000 shoppers, 1,000 retail associates and 500 retail decision makers from North America, Latin America, Asia-Pacific, Europe and the Middle East who were interviewed in October–November 2018 by Qualtrics.

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“Zebra's 2019 Shopper Study underscores the critical role technology continues to play in meeting the challenge of today's ecommerce-driven economy. While retailers have made historic strides in this area, the study defines some key areas of improvement retailers need today to be ready for the rising shopper expectations of today and tomorrow.”

*Scott Drobner, Director of Business Intelligence, Zebra Technologies*

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## Key findings

### Arming associates with devices

- Most shoppers (51%) believe they are better connected than store associates.
- Most store associates (56%) agree shoppers are better connected. Over 70% believe they could improve the shopper experience with handheld mobile computers and scanners.

### Shoppers are still willing to purchase in-store if provided with alternative out-of-stock options

- Shoppers (62%) prefer to order out-of-stock items in the store and have their purchases delivered, but only 34% of retail associates are doing this.
- Although just over half of retailers say they offer free shipping and free returns, only 22% are highly experienced at doing so.
- Most retail decision makers plan to offer the most desired delivery options, such as ordering home delivery of out-of-stock items, in 2019.

### Personal technology makes for better-informed shoppers who look to in-store associates for the personal assistance they can't get online

- 83% of retail decision makers and 74% of retail associates agree that tech-equipped associates create better shopper experiences.
- Associates (31%) say they are knowledgeable on 50% or fewer of their products.

### Retailers should invest in building consumer trust

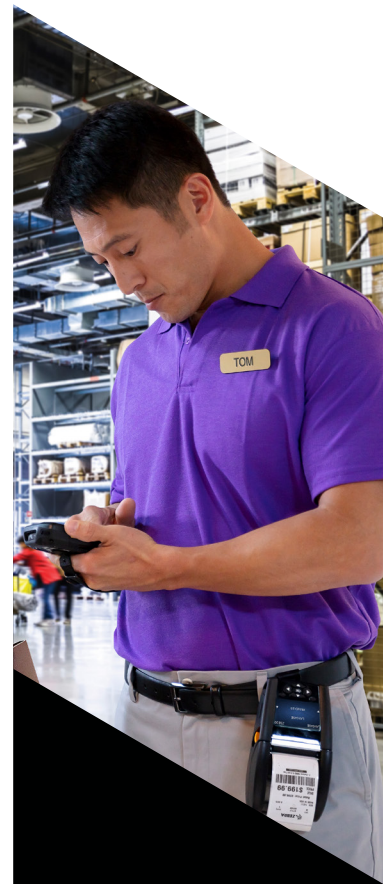
- 13% of shoppers say they “completely trust” retailers to protect their personal data.
- Retailers trail all other industries in this category.
- 73% of shoppers want the flexibility to control how their personal information is used.

### Retail decision makers face challenges other than budget in deploying technology

- Management of new technologies
- Legacy systems
- Training in-store staff

### A ‘customer first’ mentality is the top driver for technology investment, followed by:

- Reducing operating costs
- Managing inventory
- Generating revenue



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