17th Annual Global Shopper Study

Driving Profitability

Tackling Retail's Biggest Challenges

Discover how retailers achieve sustained success in today's dynamic landscape by leveraging data-driven insights and advanced analytics to uncover risks, detect trends and implement strategies that protect margins while elevating the shopper experience.
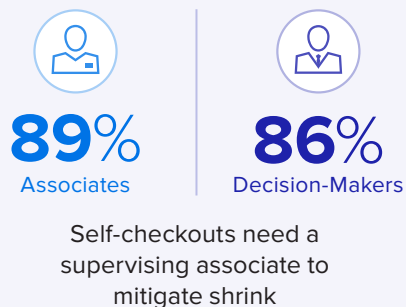
Tackling Shrink: Protecting Profits

Managing retail shrink remains a significant challenge for most retailers. Many decision-makers face increasing pressure to reduce theft and loss and minimize the amount of products they can't resell due to returns or inventory errors. Efforts to manage shrink must be implemented with the customer experience in mind. Retailers are turning to technology to strengthen inventory management and enhance in-store security while preserving shopper satisfaction and profitability.

High Stakes: Retailers Battle Fraud and Theft

85% Associates

83% Decision-Makers

Minimizing fraud/shrinkage is a significant challenge

Proper Oversight Needed to Control Shrink at Self-Checkouts

85% Associates

83% Decision-Makers

Store shrinkage/theft is a major issue with self-checkouts

89% Associates

86% Decision-Makers

Self-checkouts need a supervising associate to mitigate shrink

Retailers See Advanced Tech as the Future of Loss Prevention

Decision-makers believe key technologies can reduce shrink

1 Generative AI
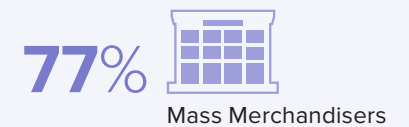
2 AI-driven prescriptive analytics, machine learning

3 Self-checkout cameras and sensors

4 Public view monitors

5 RFID tags and readers

Retailers Ramp Up Investments in Loss Prevention and Asset Protection

76%
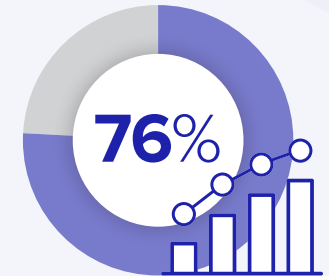
of decision-makers plan to increase investment in loss/asset protection

By Sector:

62% Food Retailers

77% Mass Merchandisers

**69%** Drug Retailers

75% General Merchandisers

Loss Prevention
Managing Risks, Protecting Operations

Shrink has become an unfortunate reality for retailers, weighing heavily on day-to-day operations and stretching resources thin. While it has always been a challenge, the rising incidence of theft and fraud is intensifying the pressure. Seventy-eight percent of decision-makers now say they feel high pressure to manage theft and loss—a figure that has climbed six percentage points over the past year—underscoring the growing urgency.

Safety concerns are becoming just as pressing as financial losses. As theft and crime surge, more than eight in 10 associates report feeling unsafe at work, with as many worried about the lack of technology to detect and react to safety threats. These anxieties ripple through store operations, affecting performance, engagement and staffing stability. When associates feel unsafe or unsupported, it becomes increasingly difficult for retailers to maintain smooth operations and meet shopper expectations—further deepening the operational challenges they face.
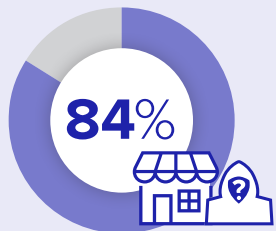
Retail Shrink Skyrockets
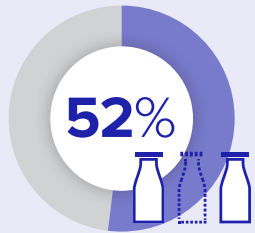
52% of decision-makers report an increase in retail shrink over the past 12 months

Percentage of respondents indicating increasing shrink rate by region:

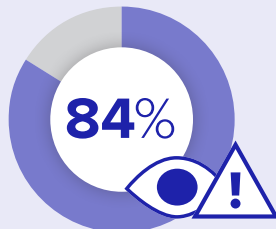| Asia Pacific	Europe	Latin America	North America
54%	**49%**	**44%**	**57%**

Safety Concerns Soar

84% of associates are concerned about their personal safety due to rising theft and crime in stores

By Region:

Asia Pacific	Europe	Latin America	North America
73%	**85%**	**87%**	**89%**

84% of associates are concerned about the lack of technology to spot safety threats or criminal activity

By Region:

Asia Pacific	Europe	Latin America	North America
72%	**87%**	**92%**	**87%**

Pressure Mounts to Control Theft and Loss

78% ↑ +**6** pp YoY

of decision-makers agree they are under high pressure to minimize theft and loss

Security Measures
Balancing Safety and Shopper Experience

**Crime Surge Fuels Concerns in Stores**

71%

of shoppers are concerned about high levels of theft and crime in the stores where they shop

Security challenges are increasingly impacting the in-store experience, with measures like locked displays and higher prices affecting shoppers. Rising retail theft and crime are growing concerns, with 71% of shoppers worried about high levels of theft in the stores where they shop. As theft drives up costs, 77% of shoppers fear that retailers may raise prices, putting further strain on their budgets and often leading them to cut back on spending. While maintaining profitability is essential, these price increases risk driving shoppers to competitors, both in store and online, who offer better prices or a wider selection.

In response, retailers are enhancing security measures and improving inventory management tools. However, these efforts can sometimes create friction for shoppers. Inventory shortages due to theft or operational issues may leave shelves understocked, adding to shopper frustration. Retail decision-makers are focusing on solutions that protect inventory while enhancing customer convenience, aiming to maintain a seamless shopping experience.
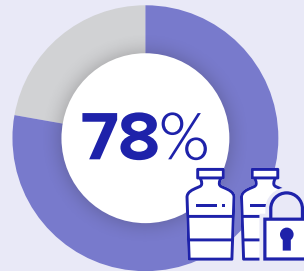

Theft Spike Sparks Fears of Price Hikes
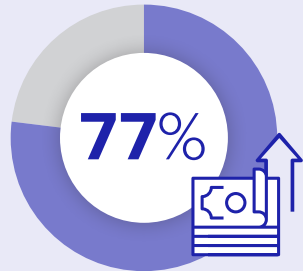
77% of shoppers worry that rising theft and crime could push retailers to increase prices

By Generation:

Gen Z (18+)	Millennials	Gen X	Boomers
72%	**77%**	**74%**	**82%**

Locked-Up Products Disrupt the Shopping Experience

78% of shoppers express frustration when the products they want are locked up or secured behind cases

By Generation:

Gen Z (18+)	Millennials	Gen X	Boomers
75%	**78%**	**77%**	**79%**

Loss Prevention Challenges Intensify

Decision-makers' greatest loss-prevention challenges

1 Balancing security efforts with customer experience

2 Integrating efforts into the existing systems to effectively identify trends and patterns

Collecting and analyzing data related to shrinkage

3 Identifying the optimal technology solutions to deploy

Retail's Technological Shift
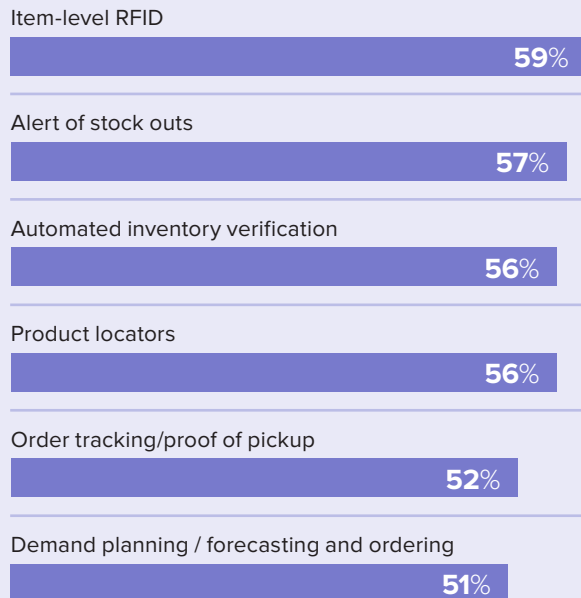## Unlocking Visibility and Automation for Operational Excellence

With growing pressures from evolving consumer expectations and operational challenges, retailers are turning to technology to improve visibility and streamline their supply chains. Investment in tools like RFID and real-time tracking has become essential for maintaining precise stock levels, preventing discrepancies, and quickly addressing potential losses. Aligning inventory with demand allows retailers to boost profitability and create smoother shopping experiences.

Beyond operational efficiency, AI-driven analytics and emerging solutions like computer vision offer powerful ways to forecast trends, monitor in-store activity, and improve security. These technologies enable retailers to transition from reactive to proactive strategies—identifying risks before they arise, optimizing resources, and delivering friction-free shopping journeys. By adopting advanced automation, retailers reduce inefficiencies while balancing security with customer convenience, ensuring loss prevention efforts enhance rather than disrupt operations.
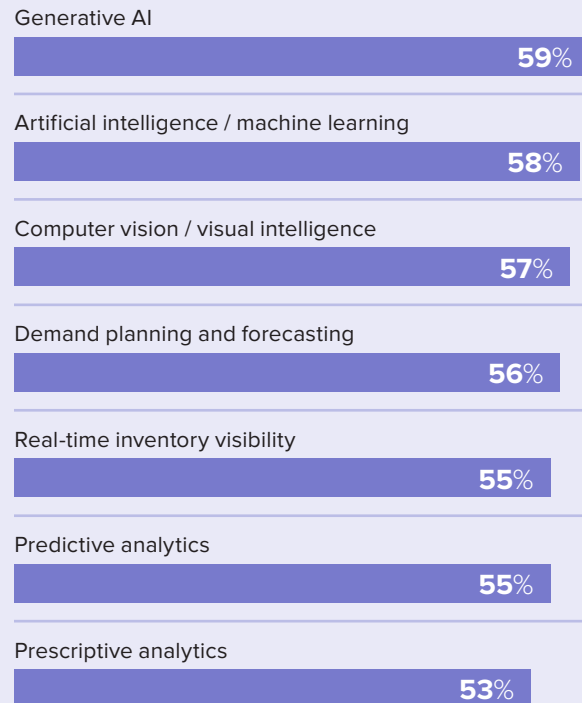
Blueprint for Change: Decision-Makers' Five-Year Implementation Plans

Automation and Intelligence

Item-level RFID
59%

Alert of stock outs
57%

Automated inventory verification
56%

Product locators
56%

Order tracking/proof of pickup
52%

Demand planning / forecasting and ordering
51%

Analytics and AI

Generative AI
59%

Artificial intelligence / machine learning
58%

Computer vision / visual intelligence
57%

Demand planning and forecasting
56%

Real-time inventory visibility
55%

Predictive analytics
55%

Prescriptive analytics
53%

Inventory Visibility Takes Center Stage

76%

of decision-makers plan to increase investment in inventory visibility

By Sector:

71% Food Retailers

80% Mass Merchandisers

67% Drug Retailers

**71**% General Merchandisers

The Way Forward
Technology is Essential to Profit Protection

The future of retail depends on the ability to balance innovation with operational precision. As losses from theft, fraud, and unsellable returns grow more complex, retailers must go beyond traditional loss prevention methods. Success now hinges on adopting advanced tools—like artificial intelligence, predictive analytics, computer vision and demand planning—that provide insight, enhance visibility, and enable more informed decisions.

Retailers that commit to these innovations position themselves not just to survive but to thrive. Technology investments will empower agile operations, secure profitability, and deliver the seamless shopping experiences customers expect. In an increasingly competitive landscape, those who act decisively today will shape the retail environments of tomorrow—ensuring long-term success through operational excellence and continuous adaptation.

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 17th Annual Global Shopper Study series reports on the attitudes, opinions and expectations shaping the industry's future. The series focuses on three key themes:
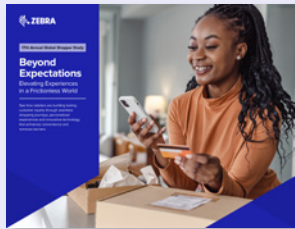
Beyond Expectations
Elevating Experiences in a Frictionless World

Driving Profitability
Tackling Retail's Biggest Challenges

Unlocking Excellence
The Power of Engaged Associates

To view the entire 17th Annual Global Shopper Study series, visit **zebra.com/shopperstudy**

Explore how Zebra can assist retailers in improving customer experience, enhancing omnichannel operations and protecting profits, visit **zebra.com/retail**

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.

ZEBRA

NA and Corporate Headquarters
+1 800 423 0442
inquiry4@zebra.com

Asia-Pacific Headquarters
+65 6858 0722
contact.apac@zebra.com

EMEA Headquarters
zebra.com/locations
contact.emea@zebra.com

Latin America Headquarters
zebra.com/locations
la.contactme@zebra.com