

RETAIL TECH ASSESSMENT:

OPPORTUNITIES FOR ENHANCED CONSUMER EXPERIENCES



UNDERSTANDING TODAY'S RETAIL LANDSCAPE



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Over the past six years, SOTI's research has continued to examine how technology, economic factors and evolving consumer expectations are reshaping the global landscape. As inflation, shifting supply chains and geopolitical uncertainty persist, retailers must adapt to meet the growing demand for seamless, personalized and secure experiences, both online and in-store.

This year's report explores how retailers can close the gap between physical and digital channels. Consumers no longer distinguish between them - they expect the same convenience, speed and service wherever they shop. Whether browsing online or visiting a store, consumers want consistent pricing, promotions and loyalty programs that reflect a unified brand experience.

To solve this, technology remains at the heart of this transformation. When applied strategically, technology can improve operational efficiency, reduce costs and enhance productivity, all while strengthening the overall consumer experience. By leveraging automation, analytics and integrated mobility solutions, retailers can unlock the power of smarter, connected operations that benefit employees and consumers alike.

Lastly, the report identifies the growing importance of trust and security in the retail experience. Rising cyber threats and fraud risks are making consumers more cautious about how their personal and payment data is handled. Retailers must adopt a security-first mindset for all retail channels to protect consumers and maintain both confidence and loyalty.

SOTI's 2026 global retail report expands to include new market insights from Italy and Spain, providing a broader view of worldwide retail dynamics. This report reveals clear opportunities for retailers to unify digital and physical operations, leverage technology more effectively, and strengthen the trust that underpins every consumer relationship.

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METHODOLOGY

This year, SOTI's research expanded its scope to cover 13,000 consumers, uncovering key insights into the evolving retail landscape across 11 countries, including Italy and Spain for the first time.

Interviews were conducted as follows: U.S. (2,000), Canada (1,000), Mexico (1,000), UK (2,000), Germany (1,000), France (1,000), Sweden (1,000), the Netherlands (1,000), Italy (1,000), Spain (1,000) and Australia (1,000).



KEY FINDINGS



90% of consumers choose to shop online and in-store.

88% think twice before shopping at retailers that have experienced a cyber attack.

83% want to be able to track their online orders.

82% are taking cost-cutting measures to adapt to changing economic conditions.

78% value having a choice of online delivery options and ways to return unwanted items.

65% like it when an online retailer suggests a product or service based on previous purchases.

58% want to see more technology-enhanced shopping.

58% say they choose where to shop online based on the level of personalization they receive.

54% choose to shop online for convenience and price.

41% have been victims of fraud when shopping.



BRIDGING THE GAP: CREATING SEAMLESS IN-STORE & ONLINE SHOPPING EXPERIENCES

Channel Satisfaction: Synergy Over Competition

Consumers have more options than ever when it comes to how to shop. In fact, **90%** of consumers choose to shop both in-store and online, underscoring that these channels are no longer competing, they are complementary parts of the retail consumer journey. Consumers expect a seamless shopping experience that blends digital convenience with physical engagement. The signal is clear: retailers must create synergy across core channels and deliver consistent, connected experiences online and in-store.

Consumers are increasingly choosing where to shop based on context and convenience rather than loyalty to a single channel. Half of consumers say they shop online to avoid crowds or travel, while **54%** cite convenience and price as key drivers. Additionally, **44%** turn to online shopping for better product availability.

On the other hand, **69%** of consumers prefer in-store shopping to see, touch and try items firsthand. Another **60%** want to avoid delivery wait times and **43%** believe they are less likely to return items if they shop in-store. Meanwhile, **36%** enjoy the in-store atmosphere – browsing with friends or engaging with staff.


These insights show that no single channel fully satisfies consumers on its own. Retailers must focus on seamless in-store and online shopping integration so shopping becomes less of a calculated decision and more of an enjoyable experience.



Unified Commerce: Connecting the Consumer Journey

To facilitate this experience, retailers must look at how the speed, personalization and convenience of online shopping can carry through in-store, and how the human touch and immediacy of in-store retail can be reflected online. Now is the time for retailers to integrate digital benefits to their in-store devices, such as real-time inventory visibility, mobile checkout and personalized offers. Retailers can make in-store shopping faster, more efficient and ultimately, more cost-effective.

Completing a purchase is not the end point of the consumer journey. Returns and delivery play an equally important role in the connected experience. Instant refunds to cards and the reassurance that items are returned or exchanged within the return window provide added peace of mind. Retailers must also ensure delivery and returns for online shopping are convenient and flexible, as consumers increasingly expect this level of service.












 **83% want to be able to track their order throughout the delivery process**

 **78% value having multiple delivery options and flexible return methods when items are not suitable**

Retailers that unify these touchpoints create a consistent, trusted experience – no matter where the shopping journey begins or ends. At the same time, consumers are open to seeing emerging in-store technologies integrated into their shopping journeys.



When shopping in-store, what type of emerging technology do you use?

	Global
 Self-check-outs – unmanned checkouts for barcode-scanning purchases	45%
 High-speed Wi-Fi – supports scanning, payments and personalized content	40%
 Smart trolley – trolley with item locator, product suggestions and discount alerts	33%
 Mobile point-of-service (POS) – checkout assistance from anywhere in the store	29%
 Digital signage – dynamic displays for information and promotions	26%
 Personal shopper devices – scanners that add items to a retail app for quicker checkout	26%
 Kiosks – devices for product information, inventory checks and online orders	24%
 Virtual fitting rooms/product tours – try-on or product demo experiences	23%
 Radio-Frequency Identification (RFID) checkouts – unmanned checkouts to scan multiple items simultaneously without barcodes	19%
 Facial recognition – identifies customers for personalized offers	16%
 None of the above	11%

High-speed, in-store Wi-Fi is in demand to support quicker scanning, faster payments and retail app usage. Non-traditional checkout options are gaining popularity, enabling a faster, flexible payment process. Consumers value digital signage and in-store kiosks that provide product details and check inventory availability so they can facilitate their online orders in-store.

Human Interaction: The In-Store Advantage

Despite in-store technological advancements, consumers still seek in-store interactions with staff to enhance their experience.

This year's survey found that 30% of consumers want staff to interact with them when they shop in-store:

- By gender: 33% of male consumers vs. 28% of female consumers**
- By generation: 33% of Millennials and 31% of Gen Z vs. 28% of Gen X and Baby Boomers**

Technology should work alongside staff to provide the level of service consumers expect, but retailers are failing to leverage it. For consumers who want staff interaction, 51% say it helps them find items faster and 46% find it easier to resolve queries, such as returns or product questions. Additionally, 19% of consumers say they find in-store technology confusing and do not like using retail apps or searching online while in-store. This feedback suggests that in-store shopping goes beyond app and tech availability. It is about the opportunity for retailers to engage with their consumers meaningfully.

Personalization Drives Preference

Consumers are increasingly choosing where to shop based on the level of personalization they receive.

Growing Demand for Personalization:

- 61% want their online experience to be personalized (up from 54% in 2025)**
- 62% want their in-store experience to be personalized (up from 59% in 2025)**
- 58% choose where they shop online based on the level of personalization they receive**

What Consumers Value Most:

- 65% like it when an online retailer suggests a product or service based on previous purchases (in line with 2025 and up from 30% in 2024)**
- 64% find it useful when an online retailer flags when they think they are about to run out of something (up from 62% in 2025 and 24% in 2024)**

The consistent increase over the past two years reflects growing consumer acceptance of technology and retailer efforts to align in-store experiences with evolving expectations.

The Strategic Importance of Bespoke Retailer Apps

Retail apps offer a perfect opportunity to personalize the in-store shopping experience with consumer data. Currently, 49% use them for convenience and to gain access to exclusive savings and points, with 41% enjoying the opportunity to checkout faster. Additionally, 36% like the notifications and updates that provide them with information about products and offers. Millennial and Gen Z consumers are the heaviest users of retail apps, with only 6% not using them. Older consumers are less on board, as 28% of Baby Boomers and 16% of Gen X prefer not to use retail apps.

Retailers can enhance apps to bring the technological advantages of online shopping into physical stores. While six in ten consumers appreciate the benefits of personalization, only 25% currently use the AI features in retail apps to personalize their shopping experience – highlighting a clear opportunity for growth. By encouraging the use of these tools, retailers have the potential to deepen engagement and drive loyalty. Hyper-personalizing retail apps by analyzing and collecting data from consumer purchase patterns and contextual data, such as location, time of day or in-store behavior, allows retailers to provide highly relevant recommendations, promotions and content that consumers demand.

Augmented reality (AR) features of retail apps, such as product visualization at home before purchasing, are also underutilized (currently used by 16%). Extending this to include sensory-driven features that provide scent descriptions or flavor profiles could further deepen engagement and emotional connection with consumers who crave immersive experiences. Engaging with consumers through retail apps enables retailers to co-create the shopping experience by using real-time feedback loops to gather consumer insights, test concepts and refine app features. Success in today's competitive retail landscape requires agility, innovation and a deep understanding of evolving consumer expectations.





RETAIL UNDER PRESSURE: ENHANCING CONSUMER ENGAGEMENT WITH TECHNOLOGY

How Economic Pressures Are Reshaping the Consumer Journey

Global economic uncertainty, rising inflation, the introduction of new tariffs and geopolitical instability are changing shopping habits and influencing consumer behavior. Six in ten (**59%**) say economic factors have influenced their ability to purchase their usual items in the past 12 months, and **89%** have taken measures to adapt to the changing economic conditions.













The impacts on shopping habits are felt mostly in the U.S., with **69%** of consumers saying economic factors have influenced their ability to purchase their usual items, followed by Mexico (**65%**), Canada (**64%**), Australia (**63%**) and the UK (**62%**), compared to **50%** in Germany, Italy and Sweden, and **49%** in the Netherlands.

In response to economic uncertainty, **82%** of consumers globally are taking cost-cutting measures, such as reducing non-essential purchases (**41%**), actively seeking out promotions, loyalty rewards or price-matching offers (**36%**), shopping online to compare prices and get better deals (**31%**), switching to discount retailers or private-label brands to save money (**26%**), delaying or cancelling a major purchase due to uncertainty (**20%**), or starting/increasing shopping through social media to get better deals (**18%**).

Shopping habits have not only changed in response to price, as consumers are choosing to support local or change products/brands because of availability. A third (**32%**) are making shopping decisions based on product origin, such as checking origin or manufacturing location (**19%**) and buying domestic to support their local economy (**21%**).

To better understand how economic pressures are influencing shopping behavior, consumers were asked:

Has current economic uncertainty made you do any of the following when shopping?

	Take cost-cutting measures	Take measures relating to product availability	Take product-origin-related measures
	82%	30%	32%
	83%	34%	32%
	83%	28%	50%
	86%	33%	44%
	81%	30%	29%
	79%	27%	31%
	78%	30%	30%
	83%	21%	24%
	77%	27%	20%
	82%	27%	30%
	80%	28%	35%
	86%	36%	33%

Inflation has significantly influenced consumer purchasing behavior, prompting them to reassess spending habits. As prices rise, consumers are becoming more selective – focusing on essentials, seeking out discounts, and showing increased interest in private-label or value-oriented brands.

Cost-cutting measures in response to inflation are evident across global markets, with many consumers actively seeking better value online. A significant proportion are turning to digital channels to find deals. This is particularly evident in Australia (**36%**), the UK (**34%**) and Mexico (**34%**), with **26%** in the U.S. and **24%** in the UK specifically opting for social commerce to get better deals.

Half of respondents in Canada and **44%** in Mexico are checking product origin or buying domestic products in response to price fluctuations and to support their local economy. Supply chain disruption have led **36%** in Australia and **34%** in the U.S. to shop based on stock availability and delivery timelines.

How AI & Innovation Enhance Retail Store Efficiency

Retailers must respond to global economic uncertainty by prioritizing agility, efficiency and consumer value to stay competitive. This can be achieved by investing in technologies that streamline operations and leveraging data and AI to enhance the shopping experience.

Rising tariffs are putting pressure on retailer pricing strategies and profit margins. Retailers need to explore ways to absorb or offset these increases to maintain consistent, high-quality experiences that strengthen consumer trust and loyalty.

Nearly a quarter (**23%**) of consumers who prefer less human interaction when shopping in-store say this is because staff knowledge can be inconsistent. This highlights the importance of investing in better-connected, in-hand technology that empowers store associates with fast, reliable access to the information consumers expect – particularly around product availability.

One retail innovation bridging this gap is RFID. RFID can carry and transmit rich product-level data, providing intelligence that gives retailers real-time inventory visibility, making it easier to locate items on the shop floor or in the stockroom using smart devices or handheld scanners. Staff can also answer consumer questions on the spot, such as availability of sizes, colors or stock at nearby locations. In addition, RFID enables a streamlined checkout by allowing bulk scanning of items, reducing wait times.






Social Commerce Trends & Deals Come at a Price

The impact of global uncertainty extends to social commerce, with **21%** of respondents having purchased through social media more than once in the past six months (up from **18%** in 2025). Of those who shop via social commerce, **68%** say purchasing items on social media is a quick, easy way to keep up with the latest trends.

However, the same challenges that affect broader online shopping also persist, with an overwhelming **92%** of consumers expressing concerns about shopping via social commerce.

Top concerns:

-  **Items never arriving (36%)**
-  **Long delivery times (35%)**
-  **Fear of not getting updates about the status of an order (28%)**

These fears are justified — of the **57%** that say they have experienced issues with fulfilment, **40%** agree that they tend to return more items when they buy this way, and poor experiences have put **44%** off from shopping via social commerce again.

Consumers turn to social commerce for speed and savings, but the fulfilment falls short of expectations. AI-driven logistics, real-time inventory tracking, and predictive analytics can help streamline supply chains and improve fulfillment speed and transparency. By embracing these innovations, retailers can reduce friction in the social commerce journey and rebuild trust and loyalty with digital-first consumers.



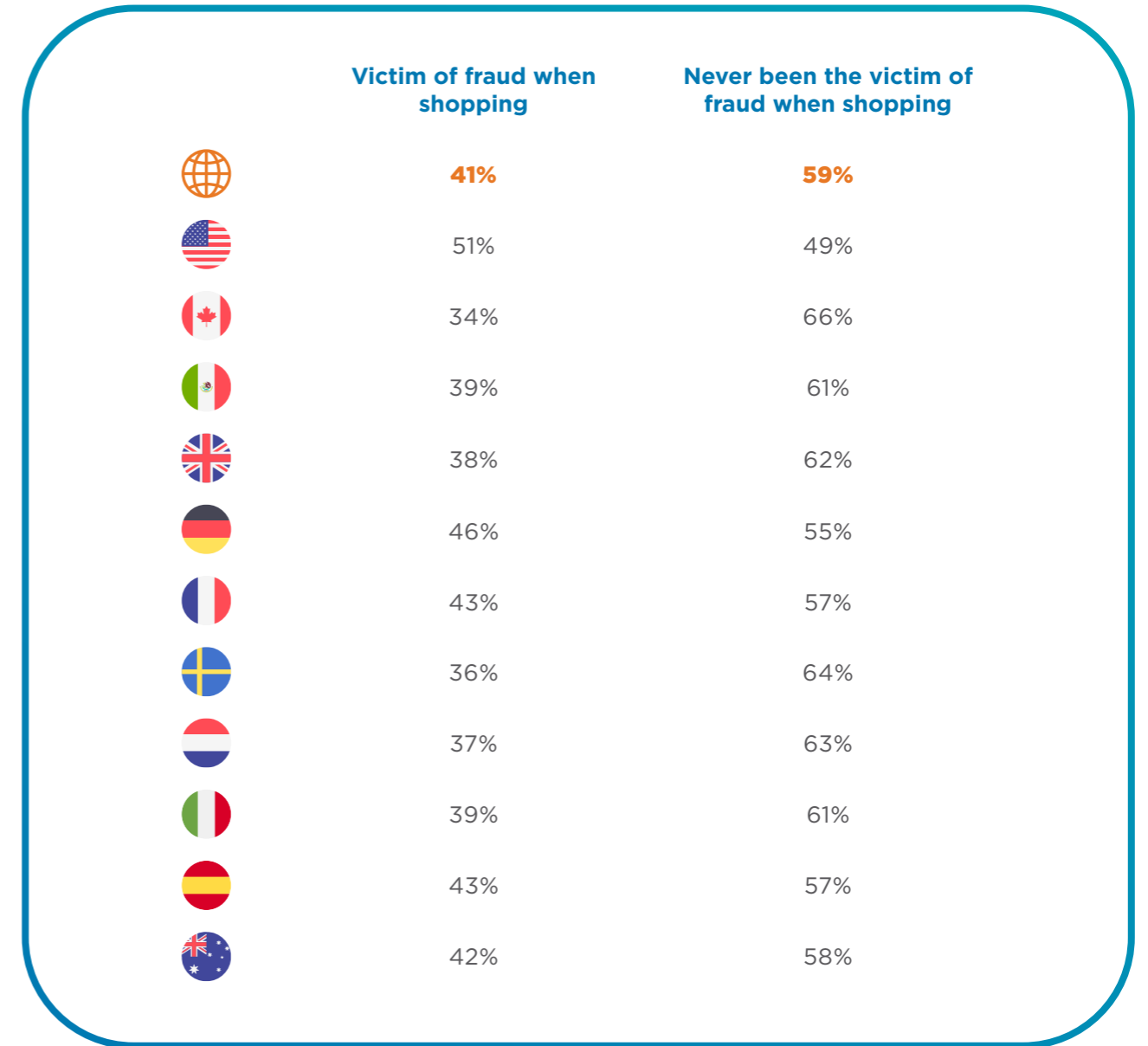


TRANSACTION ANXIETY:

WHEN FEAR MEANS MISSING OUT

Better Privacy Measures Needed in Retail Environments

Consumers have data security concerns across all shopping channels. These concerns are valid, with **41%** having been the victim of fraud while shopping.



Fraud has been experienced by more consumers in the U.S. (**51%**), compared to **37%** in the Netherlands, **36%** in Sweden and **34%** in Canada. Experiencing fraud puts **53%** of consumers off shopping with that retailer again and **38%** would be anxious about doing so.

Regardless of whether they have personally been the victim of fraud, consumers worry about their data privacy in retail interactions.

-  **52% worry about what security measures retailers have in place to protect their online transactions**
-  **47% worry about what happens to their data when a retailer stores it for repeat purchases**
-  **49% worry about who is responsible for protecting their data when using a third-party payment solution**
-  **45% worry about how retailers store and use their data when they make a purchase or a return**

In total, **86%** of consumers worry about one or more of these concerns, up from **82%** in 2025.

Recent high-profile cybersecurity breaches further demonstrate the urgent need for better network security and fraud prevention in retail. From a consumer perspective, **22%** would avoid shopping at that retailer again following knowledge of a security breach, and **67%** would still consider shopping there, but they would take precautions to protect themselves. These precautions include being less likely to shop via that retailer's website or social media platform, avoiding sharing personal details and paying with cash instead of by card.

How Retailers Can Improve Data Security to Reduce Consumer Transaction Anxiety

Online retailers should tailor security strategies to enhance digital payment verification methods, such as multi-factor authentication (MFA), and ensure security confirmations exist during online logins and purchases. In-store retailers must ensure devices used for click-and-collect and POS services are secure, giving consumers confidence that every transaction is private and their personal data is protected.

Further measures may include blackout screens on self-checkouts when entering personal information, so no one nearby can view sensitive details. Additionally, simple security practices like preventing staff from confirming personal details (addresses, emails and phone numbers) out loud back to consumers can be enhanced by using MFA via phone or text to confirm a consumer's identity discreetly.

The Psychological Trade-Off Between Privacy & Personalization



Security and privacy may be front of mind for consumers, but over **60%** agree that personalized service online (**61%**) and offline (**62%**) is important to them.

Personalization is attractive because it delivers instant gratification, making the service more efficient, convenient and relevant. In fact, **58%** say they are not bothered if a retailer uses AI, as long as they get a personalized shopping experience (up from **49%** in 2025).



Younger generations generally do not care if AI is used, as long as their experience is personalized (**60%** of Gen Z and **64%** of Millennials vs. **54%** of Gen X and **48%** of Baby Boomers).

However, not all consumers are comfortable with their personal data being shared in this way, as **53%** say they would stop shopping in a store if they felt it was using AI to monitor their purchases, which is consistent across age and gender.



France is more cautious (**61%**)



Mexico is less so (**44%**)

Thinking about the impact that AI could have on the retail experience, consumers agree with the following statements.

	Gen Z	Millennials	Gen X	Baby Boomers
I would stop shopping in a store if I felt they were using AI to monitor my purchases.	52%	53%	53%	50%
It does not bother me if a retailer uses AI, as long as I receive a more personalized shopping experience.	60%	64%	54%	48%
Agree to both statements.	29%	33%	25%	18%

Interestingly, **29%** of consumers globally agree that they are not concerned if a retailer uses AI, as long as they get a personalized service, and that they would stop shopping at a retailer if they thought AI was being used to monitor their purchases. This shows that while consumers value personalized experiences, they also have concerns about how their data is used and the role of AI in the process. This underscores a critical theme for retailers: transparency and trust-building are essential when introducing new technologies. When trust is established, consumers are more likely to accept AI-driven personalization.

Building on this, personalization remains central to delivering the seamless, connected shopping experiences consumers expect and is a key driver in the unification of retail channels. The psychological trade-off between personalization and privacy risk highlights the importance of maintaining that trust through clear communication, ethical data use and strong security protocols. Retailers must clearly communicate how they implement best practices for protecting consumer data while maintaining robust, proactive security protocols to protect consumers and mitigate risk.





THE INDUSTRY'S PATH FORWARD

This year's findings show that consumers expect a seamlessly integrated retail experience, blending online and in-store channels based on what is most convenient, personalized and contextually relevant to them. Speed, availability, and price drive them online, while in-store remains essential for immediacy, the ability to see and try products in person, and trusted human interaction.

At the same time, consumers are navigating global economic pressures – rising inflation, tariffs and supply chain disruptions – that are reshaping their shopping behavior. As a result, they are actively seeking deals, switching to affordable alternatives and paying closer attention to product origin. While social commerce continues to gain traction, fulfillment issues have limited its full potential.

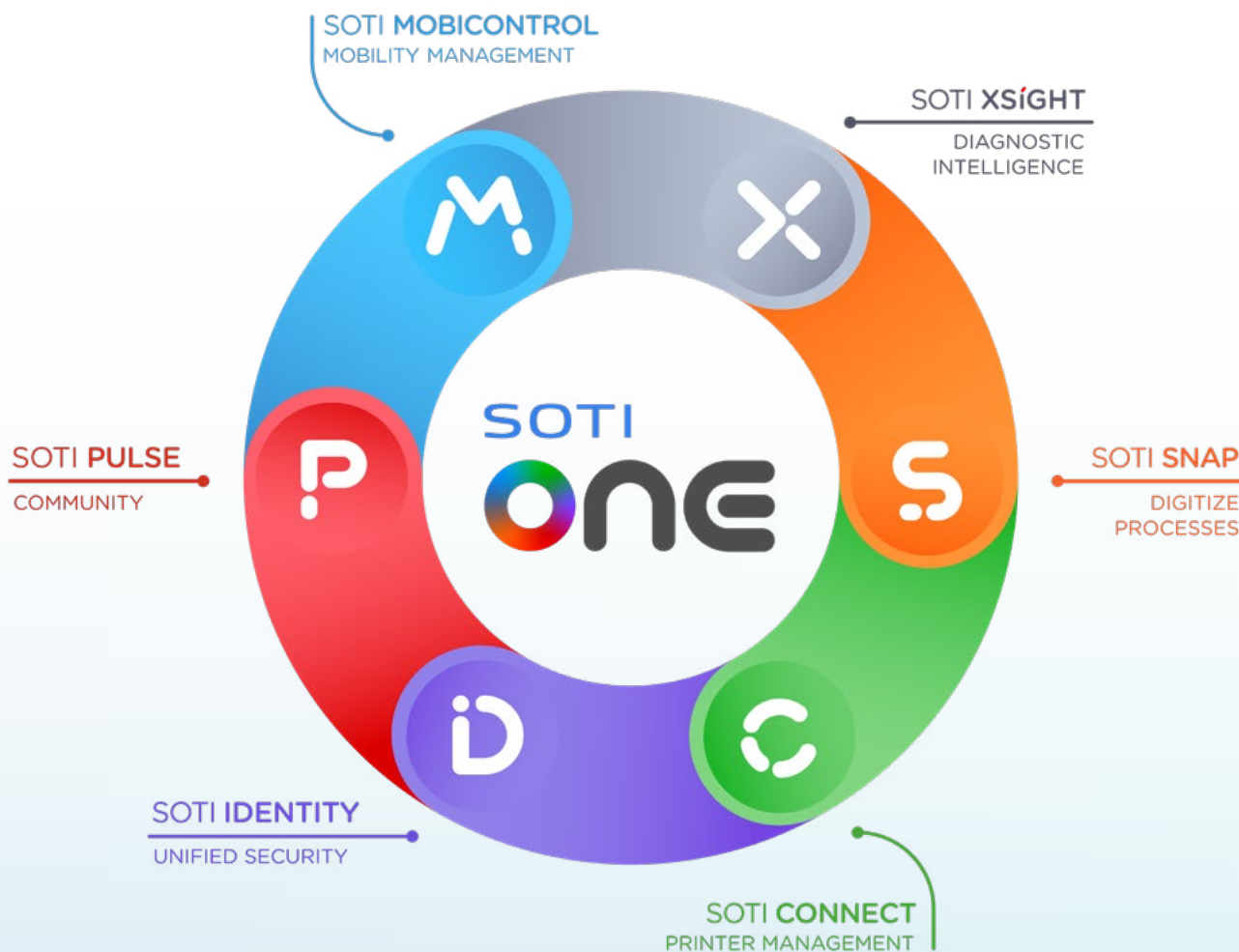
Adding to these complexities, high-profile cyberattacks have heightened consumer concerns about data security. Security breaches erode trust, causing many to avoid affected retailers or take precautions. While personalization is welcomed, there remains a clear gap in consumer understanding and trust around how technologies like AI are used in retail. In fact, half of consumers (53%) say they would stop shopping with a retailer if they believed AI was being used to monitor their purchases. This raises the question of whether consumers fully understand how AI is being used in retail, highlighting the need for retailers to build transparency and trust by communicating how consumer data is collected, stored and used responsibly.

To stay ahead, retailers must respond to shifting consumer behaviors with agile operations to meet evolving expectations. The path forward lies in combining the best of digital with the strengths of physical retail: real-time inventory visibility, mobile checkout, flexible fulfillment, and personalized experiences supported by both technology and human service. Investing in secure infrastructure, clear communication, and staff training will be essential to rebuilding and maintaining consumer loyalty.

Ultimately, the retailers that take the lead and embrace mobility will be the ones that deliver convenience, personalization and choice without compromising on security, transparency or price. Emerging technology benefits consumers by offering them the potential to have it all. Used in the right way, it offers retailers the same opportunity.

ABOUT SOTI

SOTI is a proven innovator and industry leader for simplifying business mobility solutions by making them smarter, faster and more reliable. With SOTI's innovative portfolio of solutions, organizations can trust SOTI to elevate and streamline their mobile operations, maximize their ROI and reduce device downtime. Globally, with over 17,000 customers, SOTI has proven itself to be the go-to mobile platform provider to manage, secure and support business-critical devices. With SOTI's world-class support, enterprises can take mobility to endless possibilities.



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To learn more about the SOTI ONE Platform, [click here](#).

To find out how SOTI can help with your mobile investments, contact us today at sales@soti.net.

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