

2026

Retail and Healthcare Security Leadership Survey

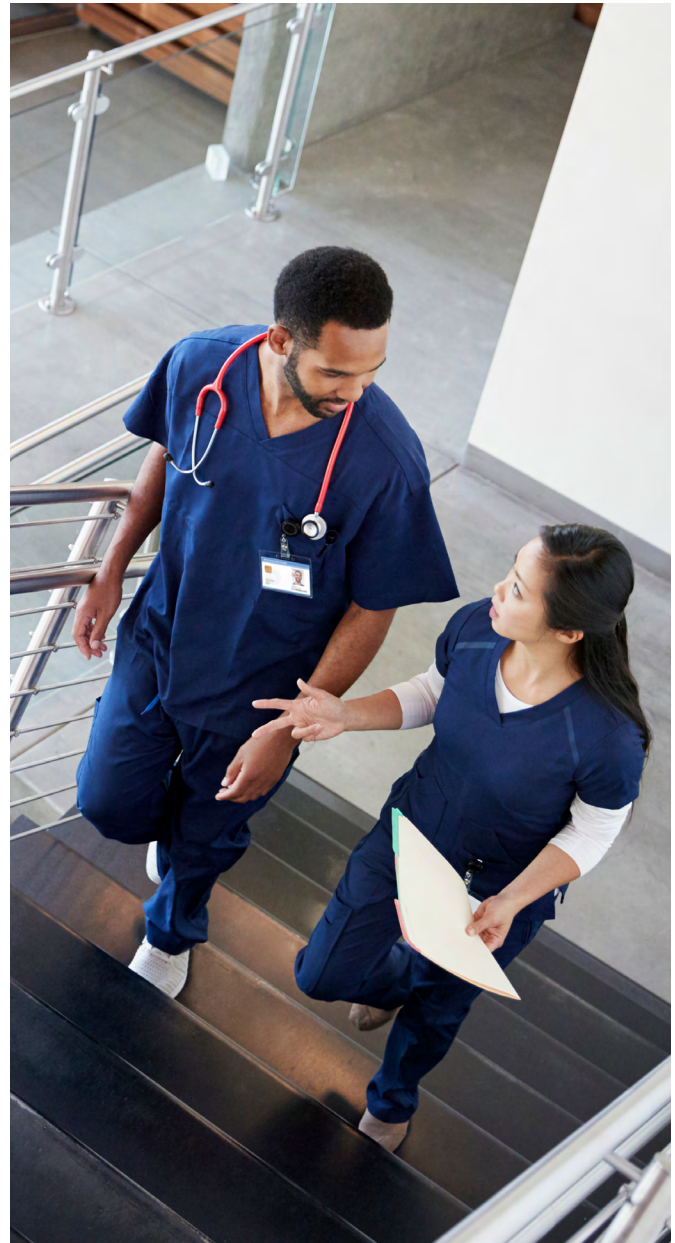


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Executive Summary

We surveyed over 250 executive leaders in healthcare and retail across the United States to understand how they think about safety and security, and the results are clear: this sits at the top of the strategic agenda, it is already disrupting operations, and investment is accelerating.

Nine in ten leaders rate workplace safety and security as an essential or high priority. And that urgency is grounded in experience: more than four in five say safety or security challenges have caused at least moderate operational disruption in the past year. For many, that disruption has been significant.

The costs go beyond the incident itself. Leaders report that safety challenges are showing up as higher insurance and legal bills, increased employee turnover, and steeper recruitment costs. These are not isolated events; they are patterns that compound over time.

The response is strong and already underway. The vast majority of organizations have increased their safety and security budgets, and 83% of leaders favor further investment in new technologies and strategies. Support spans a wide range of solutions, from real-time monitoring and body-worn cameras to de-escalation training, AI-powered tools, and drones.

Healthcare and retail leaders share a strong commitment to safety and security, though the role it plays is shaped by different operating environments. In both sectors, safety is closely connected to the day-to-day experience of employees and the people they serve, as well as the stability of operations overall.

Key Findings



1. Safety is a strategic issue.

51% of leaders say workplace safety and security is an essential priority, and a further 42% rate it a high priority — placing it firmly on the strategic agenda for more than nine in ten respondents.



2. Disruption is already widespread.

82% of leaders report at least moderate operational disruption from safety or security challenges in the past 12 months. 44% say that disruption was significant.



3. The costs compound across the business.

Safety incidents are driving higher insurance or legal costs, increased employee turnover, and increased hiring and recruitment costs, among other challenges.



4. Investment appetite is high and spans every category.

83% of leaders favor or strongly favor increased investment in safety and operational efficiency. Majorities support every specific solution tested, from body-worn cameras and real-time monitoring to AI-powered tools and drones.



5. Budgets are growing, led by technology.

The vast majority of organizations have increased their safety budgets. New investment flows primarily toward technology, followed by personnel and training.



6. Retail and healthcare are aligned on safety.

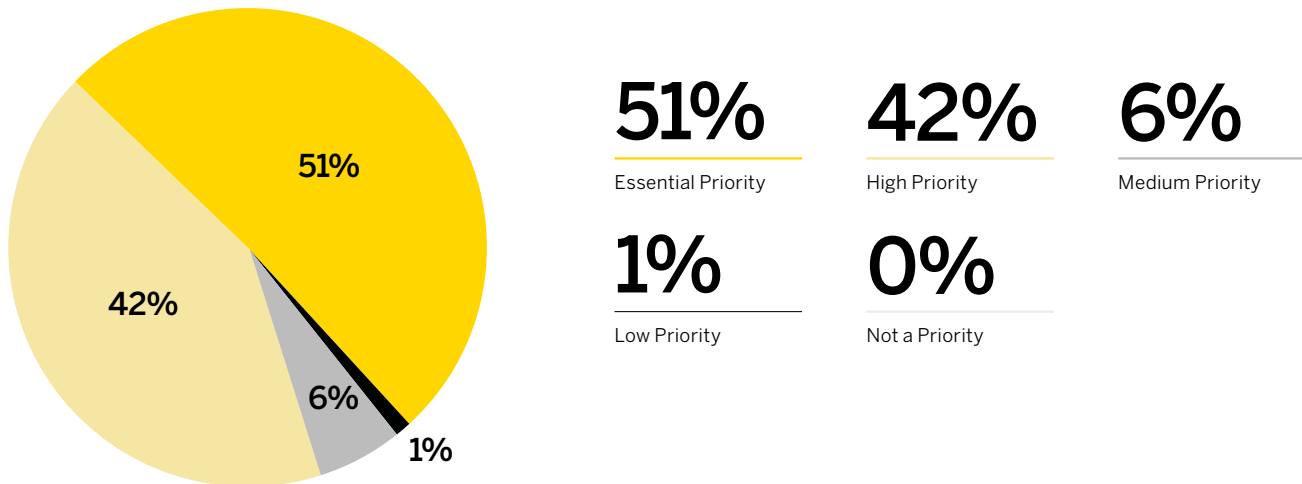
Though they operate in different environments, leaders in both sectors share a strong commitment to safety and security and a common focus on protecting people and supporting day-to-day operations.

Safety and Security Is a Strategic Imperative

Over half of leaders say safety is an essential priority, and 82% report at least moderate operational disruption in the past year.

For most leaders surveyed, safety and security is no longer a background operational concern. It has moved firmly onto the strategic agenda, with the overwhelming majority rating it as either an essential or high priority for their organization. Only a small minority place it lower, underscoring how consistently this issue now ranks among the top concerns facing leaders across both sectors.

9 in 10 leaders say safety and security is an essential or high priority.



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The urgency is grounded in direct experience. More than four in five leaders report that safety or security challenges have caused at least moderate operational disruption in the past 12 months, including 44% who describe that disruption as significant — a material impact on how their organization was able to function.

82% all leaders report at least moderate operational disruption in the past 12 months.

Across both sectors, workplace safety and security is clearly embedded at the strategic level. In healthcare, 93% of leaders rate it as an essential or high priority; in retail, 92% say it is essential or high priority. The takeaway is consistent: in both industries, safety is a core business issue.

And yet, despite the strategic attention safety now commands, most organizations are still not operating from a fully mature, enterprise-wide approach. More than six in ten leaders describe their organization as either primarily reactive to incidents (35%) or structured but still reactive (29%). Just 15% report that safety and security is fully integrated into enterprise strategy. In other words, while safety has clearly risen on the leadership agenda, most organizations are still earlier in the journey of embedding it across the business in a truly strategic way.

35% of leaders say their organization is primarily reactive to safety and security incidents.

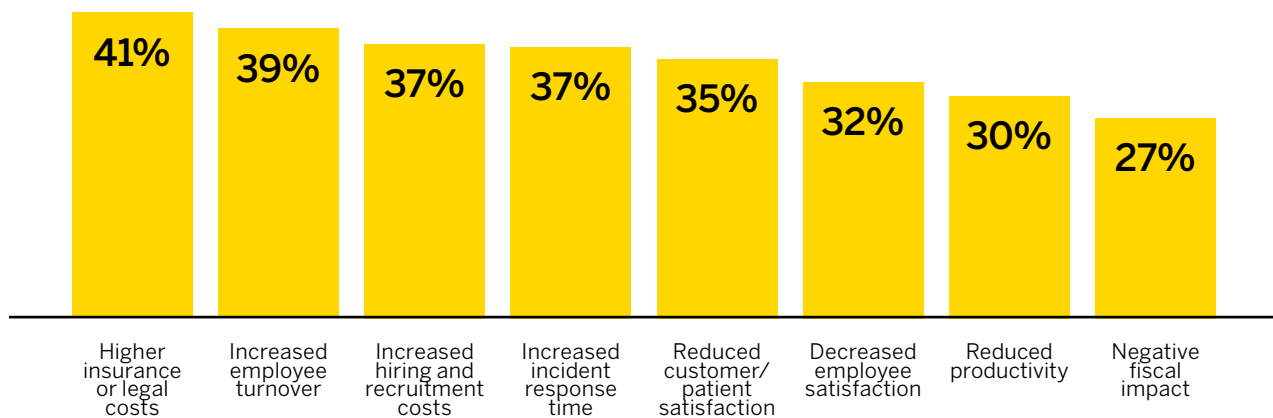
The Business Costs Are Real and Varied

Safety challenges are driving higher costs, more turnover, and steeper recruitment spend – a compounding toll that extends well beyond any single incident.

Safety challenges do not stay contained to the moment of the incident. They ripple outward into HR, finance, legal, operations, and more, and the costs accumulate in ways that are sometimes harder to see than a single line item.

Across the total sample, leaders most commonly report higher insurance or legal costs, followed by increased employee turnover and increased hiring and recruitment costs. Each of these is a compounding burden: the financial exposure that follows an incident, the cost of losing experienced staff, and the ongoing expense of rebuilding a team.

Number of enterprise leaders reporting the following effects from safety and security challenges in their organizations.



Investment Is Accelerating — Across Technology, People, and Training

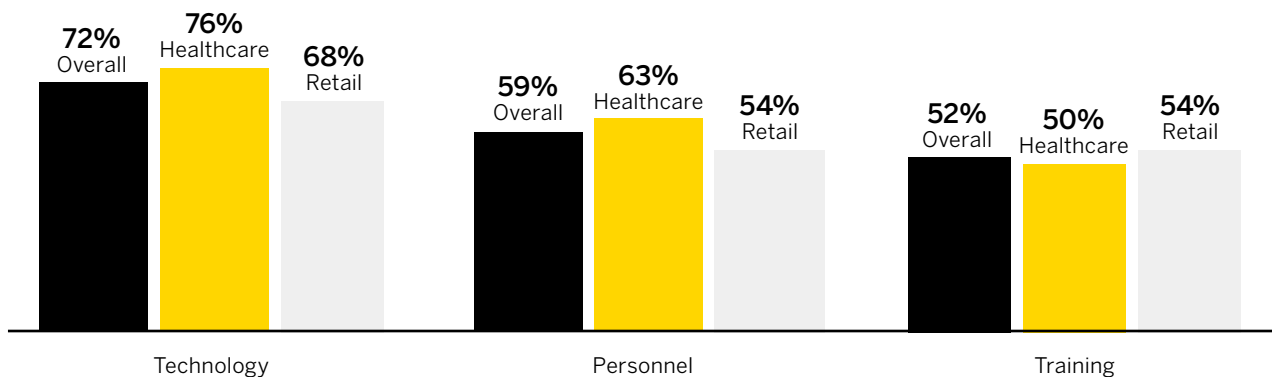
83% of leaders favor increased investment in safety. Budgets are already growing, and support is broad across every solution category tested.

The response to these challenges is clear and already underway. Eighty-three percent of respondents favor or strongly favor increased investment in technologies and strategies to improve safety and operational efficiency. Budgets are moving to match: nearly all respondents reported some level of budget growth.

- 83% of respondents favor or strongly favor increased investment in technologies and strategies to improve safety and operational efficiency.

When asked where new investment flows, the majority of respondents indicated an emphasis on technology, though personnel and training were also prioritized. The combination reflects a recognition that technology alone is not enough — it must be paired with the right people and skills.

Where investments are being directed



Leaders increasingly view safety and operational technologies as investments with multifaceted benefits. Four in ten respondents associate these tools with improved productivity and operational uptime, and the same share point to stronger incident documentation and accountability. Others see value in better executive visibility into risk, reduced legal and insurance exposure, and improved employee safety. Taken together, the results suggest leaders are evaluating these technologies not only for how they support response in the moment, but for how they strengthen operations, reduce downstream risk, and create a safer, more accountable organization.

Associated benefits of safety and operational technologies

Improve productivity + operational uptime	Improve incident documentation + accountability	Strengthen executive visibility into risk	Reduce legal and insurance exposure	Improve employee safety
41%	41%	37%	36%	35%

When asked about specific solutions, leaders express majority support across every category tested, reinforcing the need for a more connected security ecosystem. Rather than relying on a single technology or tactic, organizations are showing favorability for a mix of tools and strategies that span prevention, visibility, response, accountability, and employee support. The results point to a growing recognition that effective safety programs depend on how these capabilities work together, not how any one solution performs in isolation.

Drones and counter-unmanned aerial systems technology



69% combined
37% strongly favor
32% favor

Employee wellness and resilience initiatives



68% combined
31% strongly favor
37% favor

Real-time visibility or monitoring operations centers



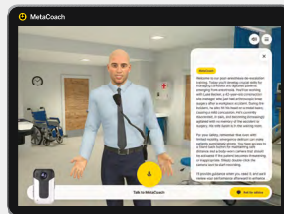
66% combined
34% strongly favor
32% favor

Fixed cameras



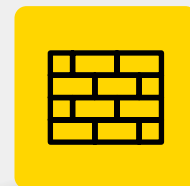
66% combined
31% strongly favor
35% favor

De-escalation training for frontline employees



65% combined
33% strongly favor
32% favor

Physical security infrastructure



64% combined
30% strongly favor
34% favor

AI-powered tools



64% combined
28% strongly favor
36% favor

Body-worn cameras for security or frontline staff



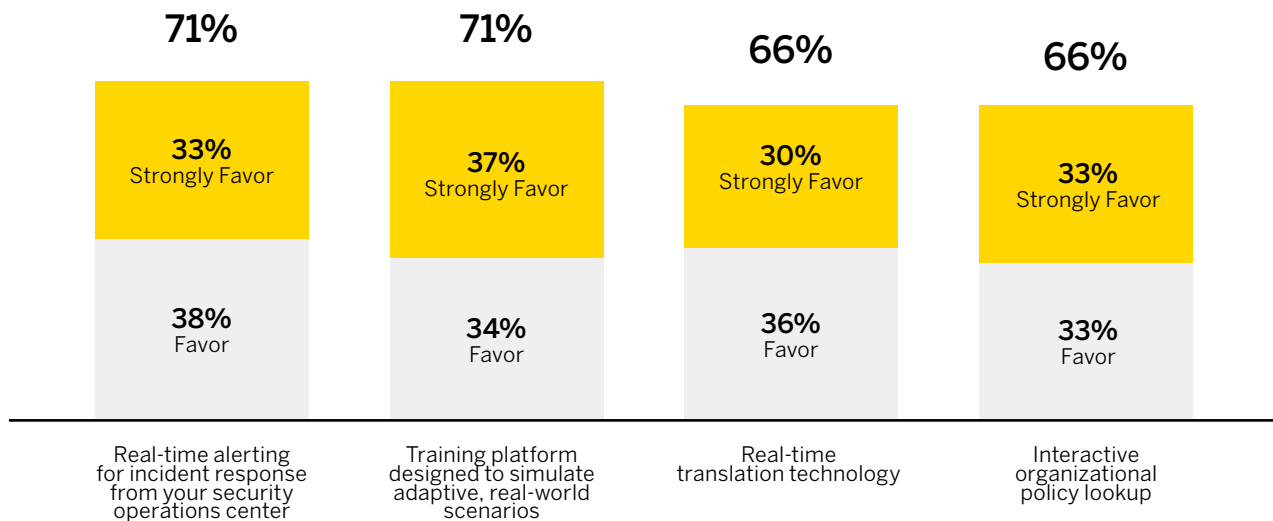
61% combined
28% strongly favor
33% favor

AI Tools Are Earning Broad Support

Majorities of leaders favor investing in every AI-powered tool tested, with strongest support for tools tied to real-time response and training.

Leaders expressed majority support across every AI application tested in the survey, signaling a clear appetite for tools that can solve practical, operational challenges. Support is strongest for real-time alerting for incident response and training platforms designed to simulate adaptive, real-world scenarios, suggesting that leaders are especially drawn to AI that helps teams act faster and prepare more effectively.

Support also extends to tools that improve day-to-day communication and decision-making. Real-time translation technology and interactive policy lookup each earn support from roughly two-thirds of respondents, reinforcing that leaders see value in AI not only during high-stakes incidents, but also in the everyday moments that shape consistency, efficiency, and service. Taken together, the results point to a pragmatic view of AI: leaders are most receptive to applications that are immediate, functional, and clearly tied to operational outcomes.



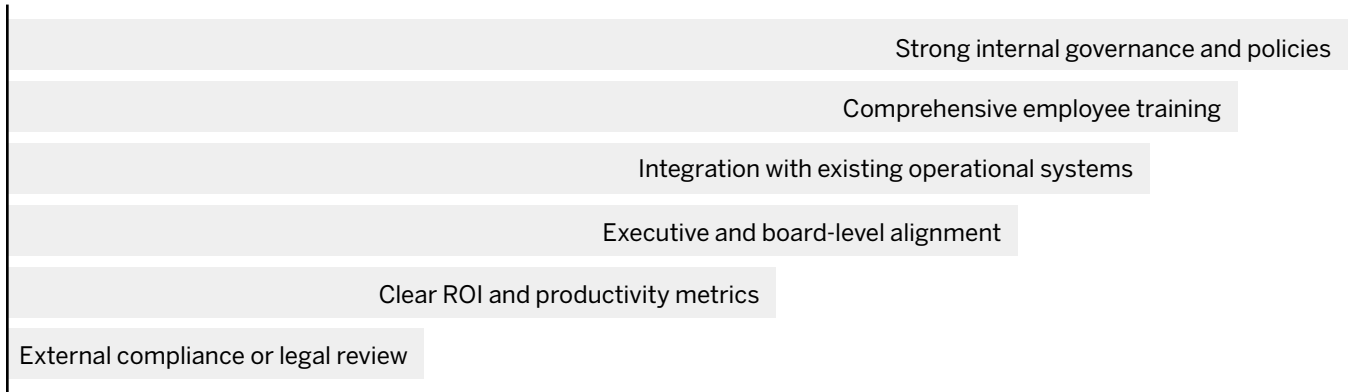
What Leaders Value in Safety Technology

Leaders want safety technology that fits into the business, with clear guardrails and clear proof of value.

Safety and operational technologies are not viewed as all upside. Some leaders also associate them with real challenges, including implementation complexity (36%), difficulty measuring ROI (32%), and privacy or employee trust concerns (29%). These results suggest that organizations are approaching these investments with a clear understanding that successful deployment requires more than buying the technology itself.

But leaders are being pragmatic about the conditions that will increase confidence in and success of these technologies. They want solutions that are deployed responsibly, fit into existing operations, and support employees in the field. The conditions most likely to increase confidence are strong internal governance and policies, comprehensive employee training, and integration with existing operational systems. Executive and board-level alignment also matters to nearly half of leaders. Together, these results suggest that leaders value operational fit and organizational readiness as much as the technology itself.

Conditions that would increase confidence in deploying safety and operational technologies



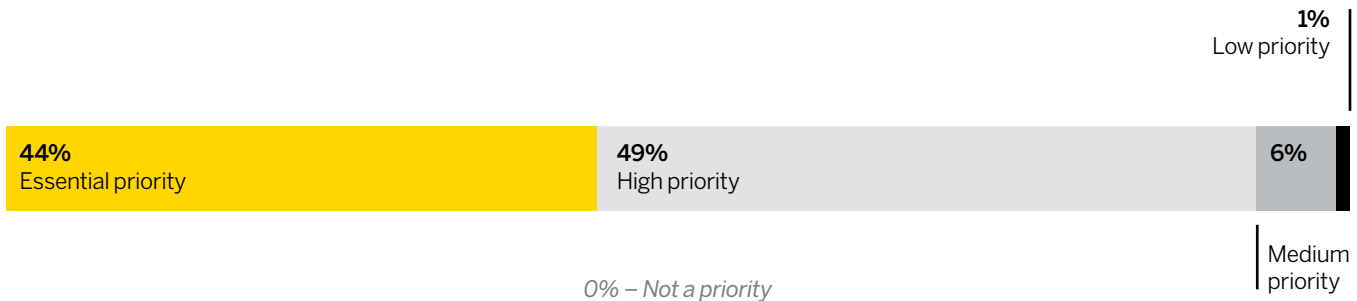
That same practical mindset shows up in how organizations judge results. Four in ten respondents measure safety and security investments through operational improvement or reduced disruption, customer or patient experience scores, and reduction in claims or litigation. Employee retention, incident reduction, and productivity metrics also play a role for three in ten respondents. These measures show that organizations are evaluating safety investments through a broad business lens, looking not just at security outcomes, but at how safety affects continuity, experience, and risk across the organization. At the same time, about one in four say they do not formally measure ROI, suggesting many organizations are still building more mature frameworks for evaluating impact.

Healthcare: Safety as a Foundation for Care

Healthcare leaders tie safety directly to patient trust and care quality.

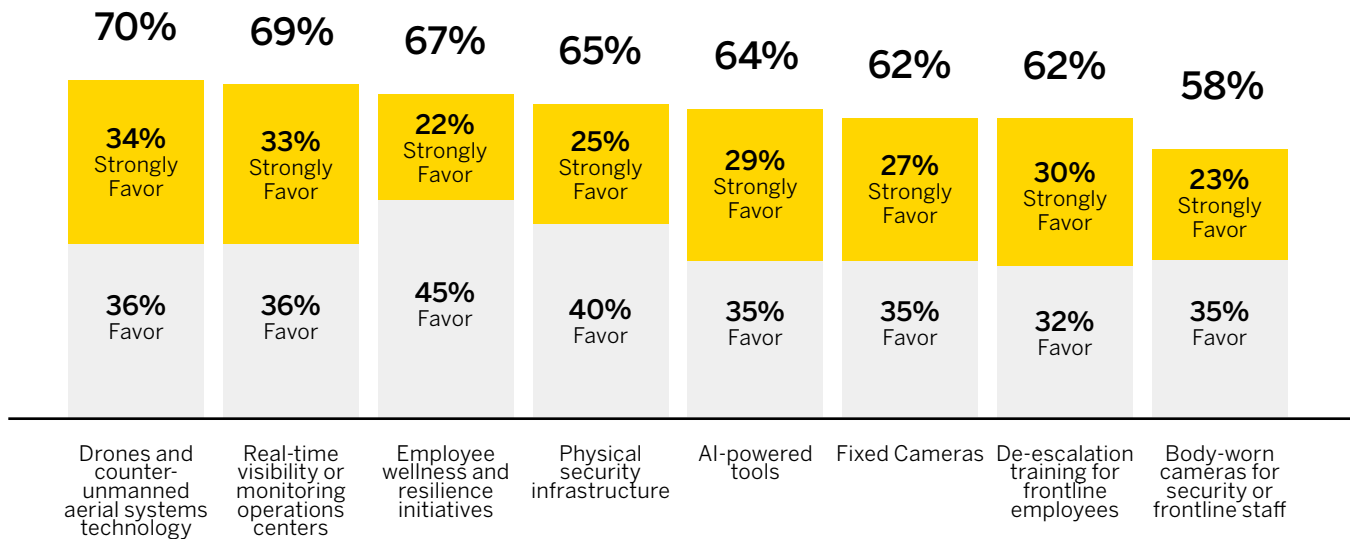
For healthcare leaders, safety is clearly a strategic priority, but it is also inseparable from the quality of care patients receive. Nearly all classify workplace safety and security as either an essential or high priority, and 84% report at least moderate operational disruption tied to safety or security challenges in the past year. The business impact is broad, with the most notable effects being employee turnover, hiring and recruitment costs, insurance or legal costs, and reduced productivity. In healthcare, these pressures do not sit on the sidelines of the organization; they affect the environment in which care is delivered every day.

9 in 10 healthcare leaders say safety and security is an essential or high priority.

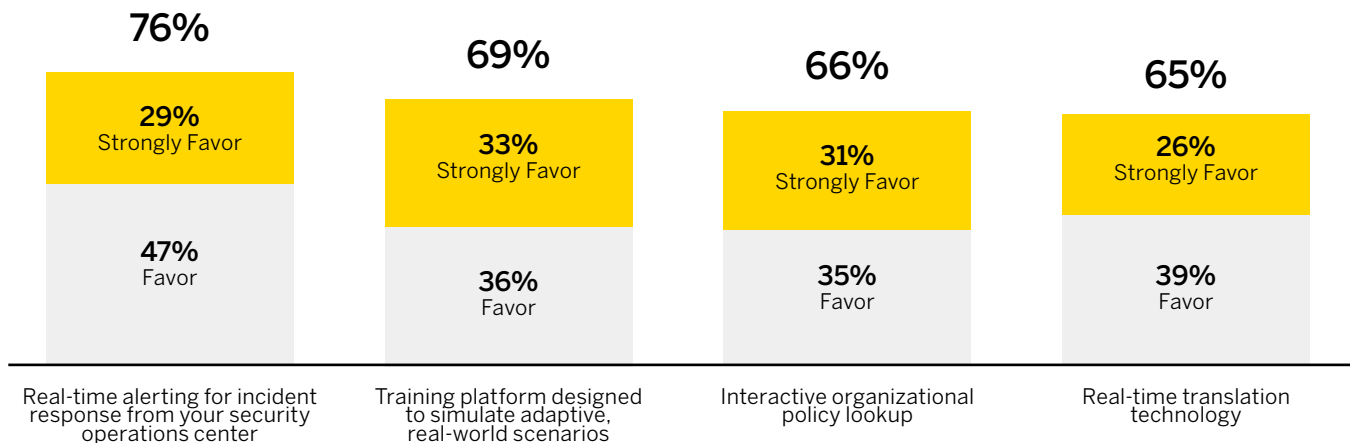


Investment in healthcare is centered on strengthening awareness, readiness, and frontline support. 86% of healthcare leaders strongly favor or favor increasing investments in technologies or strategies designed to improve both safety and operational efficiency. Technology is the leading destination for new budget, followed by personnel and training, suggesting that leaders are investing across both tools and people. Support is broad across specific technologies, suggesting healthcare leaders are looking for a balanced mix of real-time awareness, workforce support, and stronger safety infrastructure.

More than 8 in 10 healthcare leaders strongly favor or favor increasing investments in technologies or strategies designed to improve both safety and operational efficiency.



In healthcare, the appeal of AI is strongest where it can help teams make sense of critical moments faster and operate with more consistency in complex environments. Support is especially strong for tools tied to real-time awareness and training, but leaders also see value in AI that can ease communication and help staff navigate everyday decisions more efficiently.



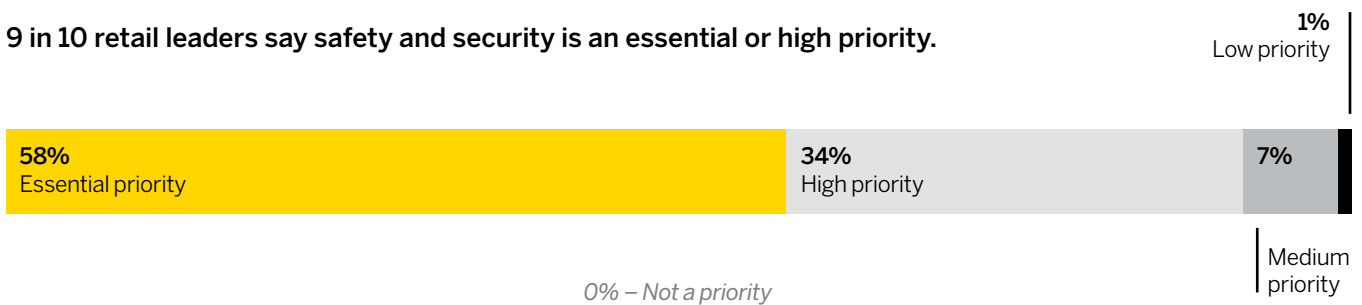
Healthcare leaders evaluate safety investments through a wider lens than incident reduction alone. Operational uptime, claims and litigation reduction, and patient experience all rank among the leading measures of success, reinforcing the idea that safety is deeply connected to continuity of care and trust in the care environment. In healthcare, safety outcomes are closely linked to patient outcomes.

Retail: Urgency at the Frontline

Retail leaders face immediate operational pressure from safety and security challenges.

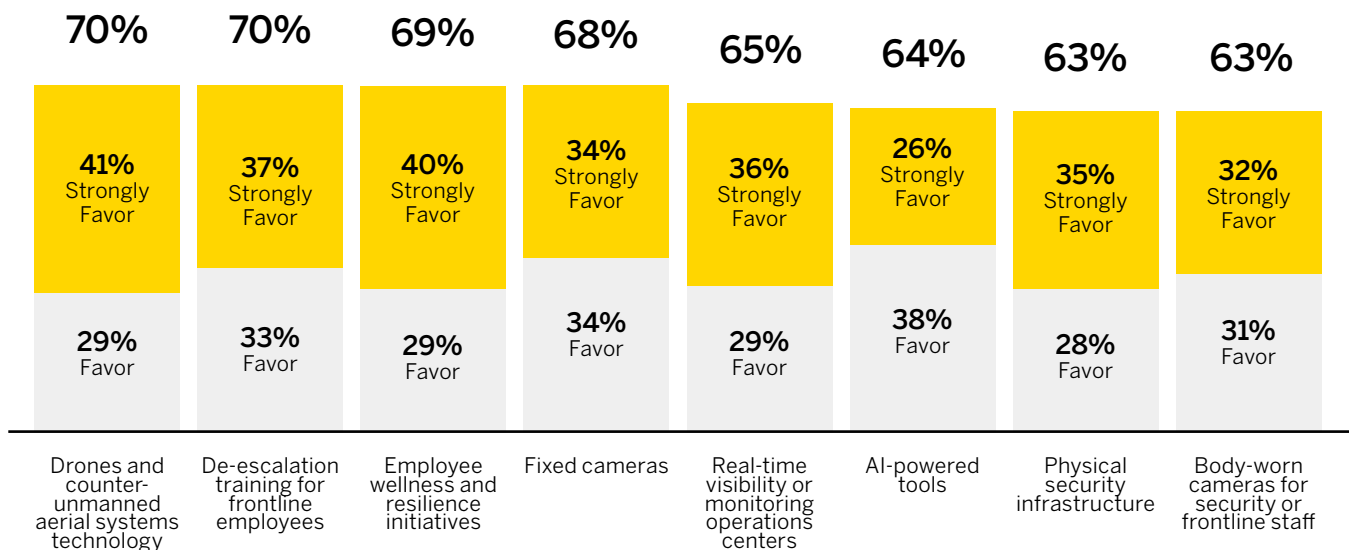
Retail leaders are operating in an environment where safety and security issues are closely tied to daily business performance. Nearly all say workplace safety and security is either an essential or high priority, and 80% report significant or moderate operational disruption tied to these challenges in the past year. The effects are especially visible in insurance or legal costs, employee turnover, and hiring and recruitment costs, pointing to a sector where safety issues quickly create financial strain and operational pressure. In retail, these challenges affect the customer-facing environment in real time.

9 in 10 retail leaders say safety and security is an essential or high priority.

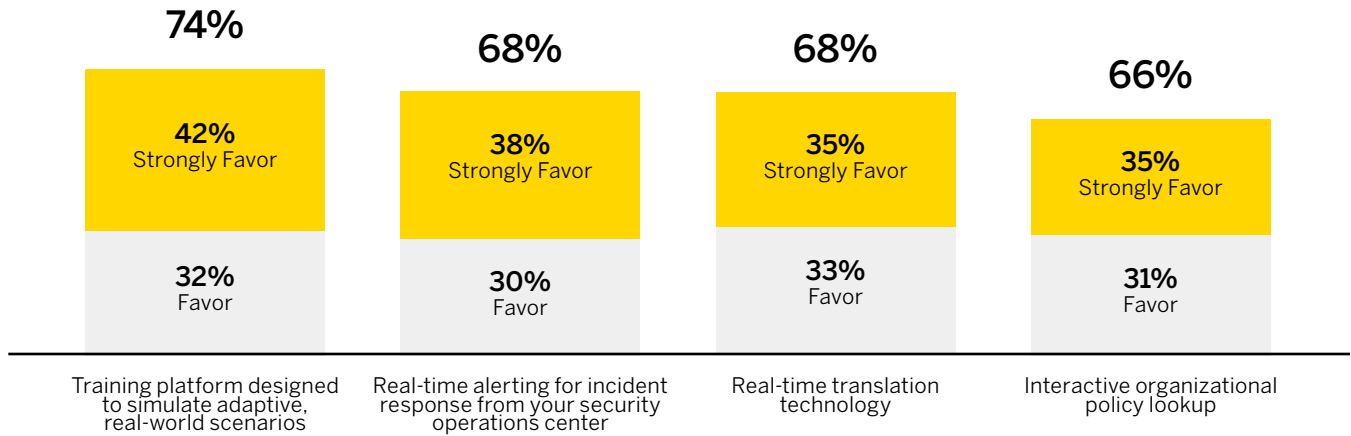


Retail leaders are also showing strong willingness to invest, with support spread across a wide range of technologies and strategies. Technology is the leading destination for new budget, but personnel and training remain close behind, suggesting that retail organizations are balancing tools with frontline readiness. The support for specific technologies points to a sector interested in investing across visibility, workforce support, and preparedness, with an emphasis on reducing disruption in fast-moving frontline environments.

8 in 10 retail leaders strongly favor or favor increasing investments in technologies or strategies designed to improve both safety and operational efficiency.



In retail, leaders are particularly drawn to AI tools that can strengthen preparedness, support frontline decision-making, and help teams respond quickly when situations unfold. The strongest support goes to training and real-time alerting, with continued interest in tools that can improve communication and make day-to-day operations more consistent.



When retail leaders assess whether safety investments are working, they look first at whether stores and operations remain stable and whether the customer experience holds up. Operational uptime, employee retention, and customer experience are the leading measures of success, followed by productivity metrics and reduction in claims and litigation. That mix reflects the realities of the sector: safety investments are judged not only by whether they reduce risk, but by whether they help maintain continuity, protect the brand experience, and support smoother day-to-day operations.

Conclusion

The findings from this survey point to a sector that has moved past debating whether safety deserves strategic attention, and is now focused on how to act. The combination of near-universal disruption, broad business impacts, and accelerating investment tells the story of organizations that understand the cost of inaction, and are committing resources accordingly.

Technology is leading the investment surge, but the data suggests that leaders believe the most effective approaches will combine digital tools with trained people and clear processes. Healthcare and retail leaders are already investing across all three simultaneously, and the organizations that sustain that approach are best positioned to shift from reactive response to proactive resilience.

The specific tools will continue to evolve — from real-time monitoring and AI-powered analytics to body-worn cameras and drone-based awareness. But the underlying goal expressed by leaders in both sectors is consistent: protect staff, reduce disruption, and maintain the trust of every patient or customer who relies on their organization.

Methodology

Axon commissioned Atomik Research to conduct an online survey of 254 executive leaders in Healthcare (n=129) and Retail (n=125) throughout the United States. The margin of error is approximately ± 6 percent with a confidence level of 95 percent for the total sample (n=254), and approximately ± 6 percent for the Healthcare and Retail subgroups. Fieldwork took place between March 27–30, 2026.

Respondents represented a range of C-Suite and vice president-level roles across organizations of varying sizes. The survey was designed to identify current attitudes, priorities, and investment trends around safety and security among senior leaders in healthcare and retail.

