Omnichannel Index 2026

IMPACT + Google

This report analyses 74 touchpoints across 373 brands and retailers in six markets, amounting to more than 27,000 data points.

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Foreword

In 2026, the biggest shift is not another channel, feature, or touchpoint. It is the growing role of AI across the entire customer journey – from how customers discover and evaluate products, to how brands operate, serve and engage. Increasingly, discovery, evaluation and even decision-making happen before a customer ever reaches your own channels. At the same time, AI is transforming areas such as customer service, assisted selling and internal operations.

This changes the rules of omnichannel.

Developed in collaboration with Google, the Omnichannel Index 2026 provides a clear view of how brands and retailers are navigating this shift – where the market is evolving, where the biggest gaps are, and where the opportunities lie.

For years, the focus has been on building the foundations: connecting systems, enabling fulfilment and ensuring consistent experiences across channels. Today, most brands deliver experiences that are fast, functional and reliable. But that is no longer where advantage is created. The brands pulling ahead are those that guide decisions, personalise experiences and build relationships over time.

AI accelerates this development. It raises expectations for immediacy, precision and personalisation, while reshaping how customers discover and interact with brands. As a result, visibility, relevance and usability are increasingly determined by the quality, structure and activation of data.

This puts pressure on one of the most important, but still underused, parts of omnichannel: the store. Connected stores are no longer just about availability, fulfilment or convenience. They are becoming critical touchpoints for capturing customer signals, supporting better advisory and service, and turning data into more relevant experiences across the journey.

This is also why our collaboration with Google is more relevant than ever. Many of the shifts observed in this Index reflect broader changes in how customers find and engage with brands across the open web – where search, AI and new discovery layers increasingly shape which brands are surfaced, compared and ultimately chosen.

Across the 373 brands and retailers analysed, a clear pattern emerges. The challenge is no longer access to capability, but how effectively it is applied. Data exists, systems are connected, and operations are in place – but they are not consistently translated into experiences that support how customers actually navigate and decide. This is where the gap between average and leading brands is created.

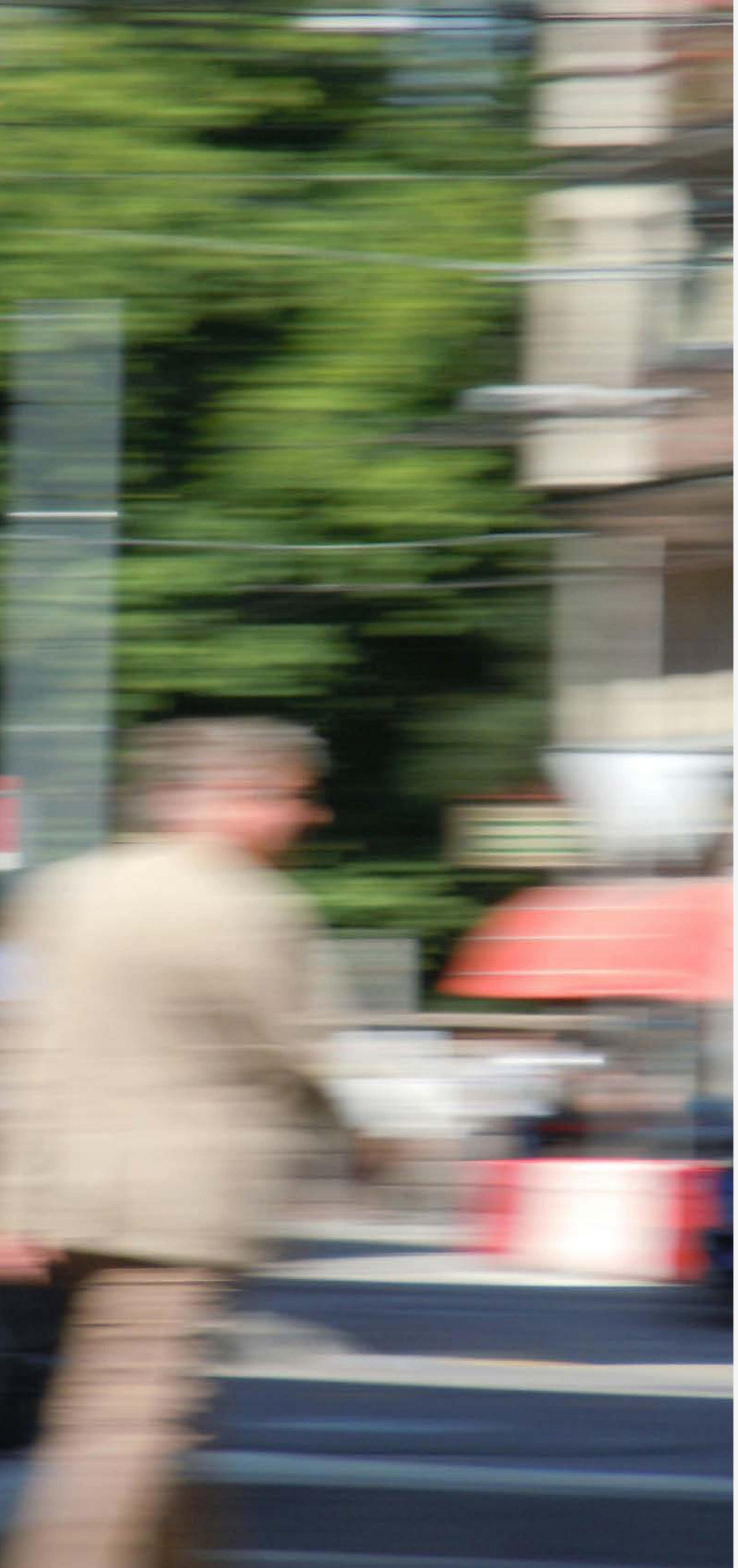
The Omnichannel Index exists to make that gap visible – and to provide a clearer basis for deciding where to act. It highlights not just what is missing, but where value is not yet realised, and where focused improvements can create meaningful impact.

At IMPACT, we work with organisations to close this gap, connecting strategy, experience, technology, data and people to turn potential into performance.

We hope this Index provides a clear perspective on how the market is evolving, and helps you identify where to focus next. Our ambition is for it to be more than a benchmark – a strategic tool to challenge priorities, guide decisions, and support the work required to move beyond the basics.

Thank you to everyone who contributed to this report.

Kasper Holst,
CEO
IMPACT Commerce



Executive Summary

Customer expectations are constantly evolving. What felt like a seamless experience two years ago – click and collect, real-time inventory, a loyalty programme that remembered your name – is now the baseline. And your customers do not only compare you to your closest competitor. They compare you to the best experience they have had anywhere, in any category, on any device.

That raises the bar for everyone. And in 2026, the bar is higher than it has ever been.

Omnichannel has moved from infrastructure project to commercial strategy. The organisations that have made that shift are pulling away. The ones that have not are falling further behind, often without realising it.

Five editions in, the Omnichannel Index has grown alongside that shift. With each edition, we've refined the framework, raised the touchpoints and sharpened the lens. The result is a benchmark that does not reward doing the basics. It rewards doing what the market actually requires right now – and the field average of 38% across 373 brands tells you exactly how many brands are falling behind.

*Average Omnchannel Perfomance**

38%

* *The 38% is the average performance score across 373 brands, calculated by scoring each brand against 74 omnichannel touchpoints and averaging the results (27,000+ data points in total).*

THE FOUNDATIONS ARE IN PLACE. NEXT UP IS DIFFERENTIATION

Technical performance, UX, digital marketing, stock data and fulfilment have reached a level of maturity where most brands deliver fast, functional and reliable experiences. That is no longer a competitive advantage – it is the entry ticket.

Advantage now comes from what sits on top: smarter search, personalised recommendations, AI-assisted journeys, richer content at the moments that matter. Across the field, that layer is still largely missing.

THE LEADERS ARE PULLING AWAY

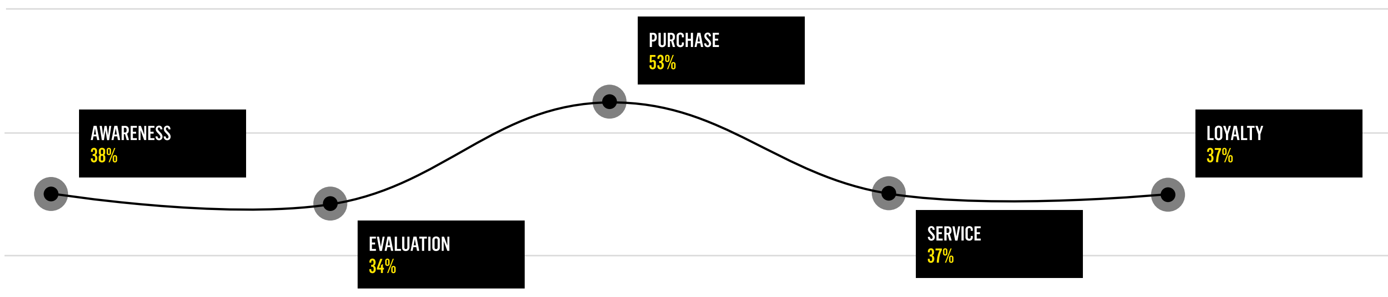
This year's top performers, IKEA (72%), Matas (69%) and Verkkokauppa.com (68%), sit more than 30 percentage points above the field average. What they share is not a single standout capability but end-to-end coherence – strong foundations, clearly defined strengths in the moments that matter most, and a consistent experience all the way through the journey.

The data also shows that only 35 of 373 brands score above 50%. That means the vast majority of the field is clustered below average, delivering experiences that are functional but largely interchangeable. That's a strategic signal. For the brands willing to make deliberate choices about where to invest, the space above 50% is less contested than it looks – and the commercial distance between being average and being a leader has never been larger.

MOST JOURNEYS ARE OPTIMISED AROUND TRANSACTION

Purchase is the standout phase at 53%, but everything around it is often neglected, with Awareness at 38%, Evaluation at just 34%, Service at 36% and Loyalty at 37%. This indicates that brands and retailers have mainly invested in making it easy to buy and underinvested in the phases where customers are actually won and kept.

As acquisition costs rise and AI reshapes how customers discover and shortlist products before they ever reach a brand's site, the phases around the transaction are becoming the new competitive frontier. Optimising the moment of purchase while neglecting the journey around it is not just a missed opportunity. It is a growing strategic risk.



CONNECTING ONLINE AND OFFLINE IS STILL UNFINISHED BUSINESS

The store network remains one of the most underutilised assets in omnichannel retail. While many brands expose elements of it – such as local inventory on the PDP – far fewer make it actionable or integrate it into how customers actually shop. Discovery, fulfilment and in-store experience still operate too often as separate layers.

This gap is visible across capabilities. Store availability is frequently shown, but rarely usable. Stock data is not consistently activated in external channels. And core in-store capabilities, such as completing transactions away from a fixed till, remain the exception rather than the rule.

The brands scoring highest in Stock Data and Fulfilment did not build new infrastructure. They made an operational decision to treat their store network as a fulfilment asset and make every layer of it visible to customers at the right moment.

EVERYONE IS TALKING ABOUT AI. FEW HAVE DEPLOYED IT WHERE IT COUNTS

19%

average AI score

AI is the lowest-scoring discipline at 19%, yet the most discussed. Most brands still approach it as a cost lever: automate the query, deflect the ticket, reduce headcount. That logic holds, but it is only one part of the picture.

The leaders are applying AI across three areas. In development, it accelerates time-to-market through AI-powered coding, rapid prototyping and simpler architectures. In the back office, it drives efficiency through automated content workflows, order handling and price and stock optimisation. And at the customer level, it improves how people search, discover and interact, directly impacting conversion.

The Index data shows that this customer-facing layer is where many fall short. Only 42% of brands have machine-readable product pages, 11% offer semantic search, and just 3% support visual search, limiting both visibility and the quality and relevance of the experience AI can deliver.

Meanwhile, a structural shift is underway. AI is influencing how customers discover and evaluate products before they reach a brand's own channels. This rewards those with clean, structured, machine-readable content, and sidelines those without it.

The takeaway is simple: AI is not a single use case. It is an end-to-end capability across development, operations and experience. The brands pulling ahead are not just more visible – they are using AI to shape journeys in real time, tailoring content, recommendations and interactions to each customer, and turning every touchpoint into a more relevant, more personal experience.

MOST BRANDS ARE COLLECTING DATA. FEW ARE DOING ANYTHING MEANINGFUL WITH IT

Most brands have built the infrastructure to capture customer data, but very few use it to create experiences that feel personal, timely or genuinely valuable.

The gap is clear. While 77% of brands capture first-party data, only 27% use it to act on behaviour and engage customers in a more relevant way. At the same time, loyalty strategies remain heavily skewed towards discounts and incentives, with 77% relying on monetary rewards, and just 20% offering benefits that create emotional or experiential value.

As acquisition costs continue to rise, that gap becomes increasingly commercial. Discounts can drive the next purchase, but they rarely build lasting preference. The brands pulling ahead are using data differently – to strengthen relationships over time, create meaningful value beyond the transaction, and give customers a reason to return, not just a reason to buy.

CAPTURING DATA

77%

capture customer data at checkout.

ACTIVATING DATA

27%

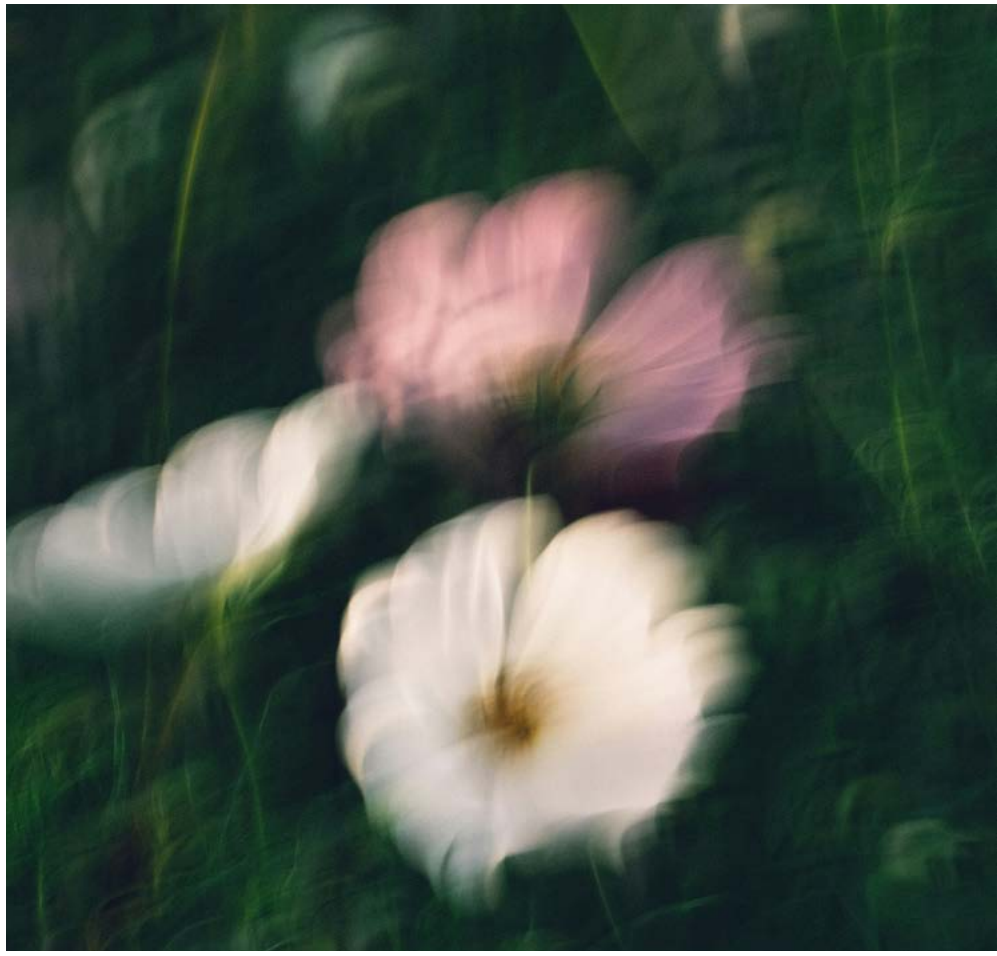
use behaviour-based automated communication.

SUSTAINABILITY IS SHIFTING FROM COMPLIANCE TO COMMERCIAL ADVANTAGE

Sweden scores 44% on Sustainability, nearly 18 percentage points above the field average. Both brands achieving a perfect 100% score in index history – Kappahl and Nudie Jeans – are Swedish. What they have built is not a sustainability programme. It is a commercial model, where circular services, product-level transparency and responsible incentives are woven into the customer experience at every stage of the journey.

The opportunity the rest of the field is underestimating is significant. Re-commerce alone is growing 4.4 times faster than overall retail – yet only 11% of brands have implemented a resale model. Meanwhile, the EU Digital Product Passport will soon make product-level transparency a legal baseline, turning what is currently a differentiator into a minimum requirement.

The brands that move now will not just be compliant ahead of schedule. They will have built customer-facing sustainability capabilities that generate loyalty, drive new revenue streams and create a head start that late movers will find very difficult to close.



BUDGET AND SCALE DOES NOT GUARANTEE CONSISTENT PERFORMANCE

IKEA – the highest-scoring brand in the index at 72% average – has a 13.5pp gap between its best and worst market. This is not an outlier, but a pattern. Across 36 multi-market brands, only 13 deliver consistently strong performance across markets.

This highlights a structural reality: omnichannel maturity does not scale automatically. Having the right platforms, partners or central strategy in place is not enough to ensure consistent execution.

What separates consistent performers from the rest is not technology, but operational discipline – the ability to translate strategy into local execution, align teams across functions, and maintain clear ownership of performance at market level. Without that, even well-defined strategies fragment in practice.

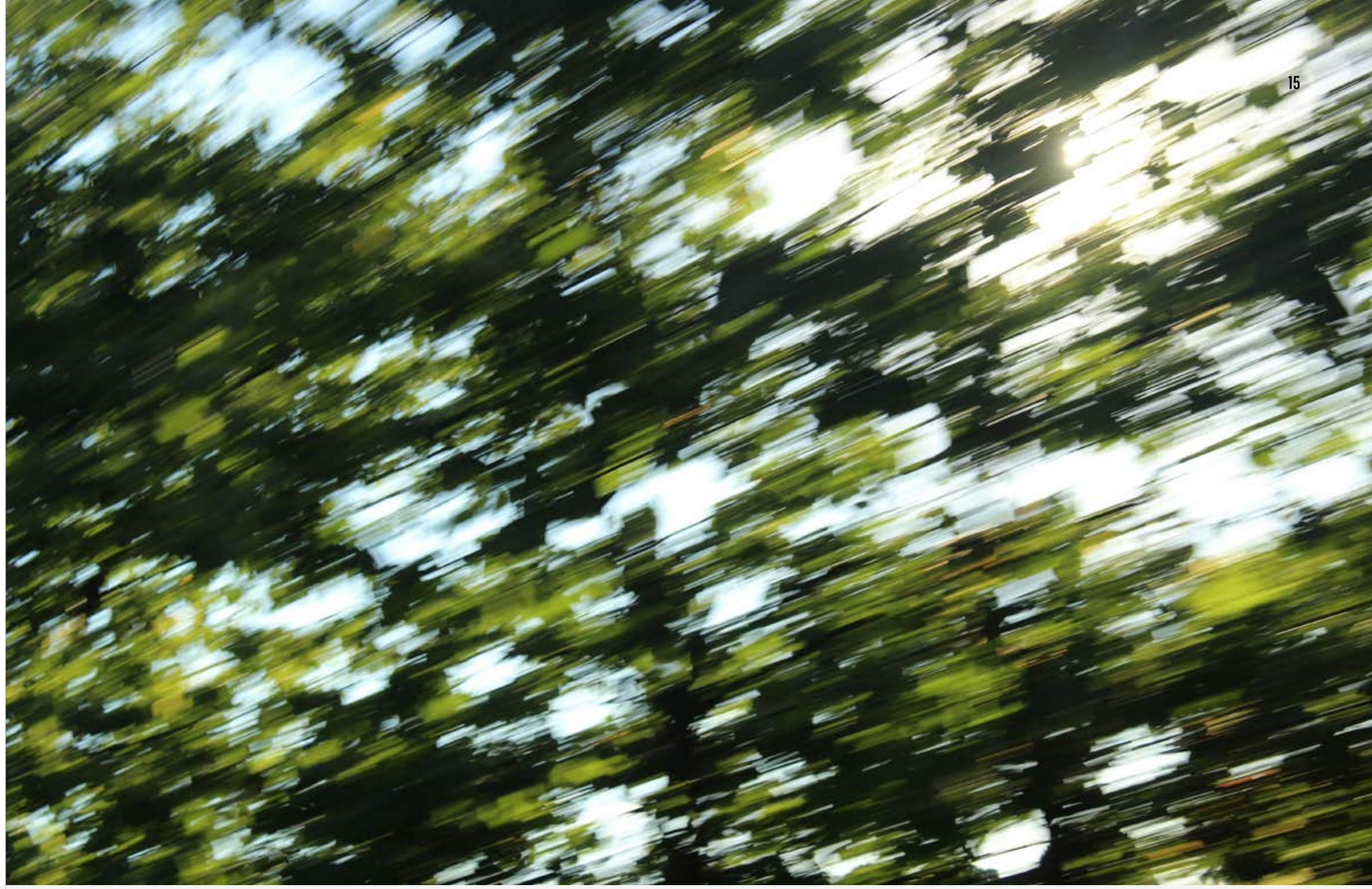
For customers, this inconsistency is visible. The same brand delivers different experiences depending on market, eroding trust over time. For organisations, the impact is commercial. What works in one market is not being replicated in others, leaving revenue and efficiency on the table.

What it takes to get ahead

The brands pulling ahead are not winning because they have discovered entirely new capabilities. Most of what the market now needs already exists: stock visibility, fulfilment options, customer data, personalisation tools, store networks, service channels.

The real difference is that leaders have made these assets usable, connected and commercially accountable. That is why the next phase of omnichannel will be shaped less by feature adoption and more by operating discipline.

In practice, two things matter most: simplifying the technology landscape, and enabling the organisation to execute against it.



TECH SIMPLIFICATION

COMPLEXITY IS THE BOTTLENECK

Many of the gaps in this Index – disconnected store experiences, underutilised data, limited AI adoption – are not isolated issues. They are symptoms of the same underlying problem: fragmented technology and too much complexity.

Brands want to personalise, but customer data sits across systems. They want to activate store inventory, but stock is not reliable enough to use confidently across channels. They want to embed AI into discovery and service, but the underlying content and product data are not structured to support it. The result is a pattern seen throughout the Index: capabilities exist, but they do not consistently show up where customers need them.

This is why simplification matters. Not because simpler stacks are inherently better, but because they make execution possible.

When product data, customer data and stock data are governed clearly and made available across the journey, brands can move from isolated capability to coordinated experience. Search gets smarter. Service gets more contextual. Stores become usable fulfilment nodes rather than disconnected physical assets. AI becomes something more than an experiment layered on top.

The strongest performers are not necessarily the ones with the most advanced tech ecosystems. More often, they are the ones with fewer overlaps, clearer ownership and a more disciplined approach to what each system is there to do. In other words: less architectural ambition, more operational clarity.

ORGANISATIONAL ENABLEMENT

TECH IS ONLY 25 % OF THE ANSWER

Even with a coherent stack and accessible data, performance will vary if the organisation is not set up to use it. This is where many brands fall short. The capabilities are there – stock is visible, data is available, tools are in place – but they are not applied consistently across markets, stores and teams.

Many brands still treat omnichannel as a digital initiative, owned by a single function. That is why performance peaks at purchase, but breaks down in evaluation, service and loyalty – the parts of the journey that require coordination across teams.

The brands that get ahead treat omnichannel as an operating model:

- ***Leadership mandate:*** clear direction and prioritisation from the top.
- ***Cross-functional execution:*** teams spanning retail, e-commerce, marketing and service.
- ***Shared KPIs:*** one customer view, one commercial view, aligned incentives.
- ***Clear ownership:*** responsibility defined at journey level, not by channel.

Finally, the difference shows up in how consistently capabilities are used. Structured training, clear service levels and performance tracking turn features into behaviour. Metrics such as on-time fulfilment, rejection rates, Endless Aisle contribution and Click & Collect cross-sell are not operational details – they are leading indicators of whether the model is working.

Without this organisational backbone, even the best platform delivers a fraction of its potential. With it, the same capabilities become repeatable, scalable and commercially meaningful across markets.

Methodology

The Omnichannel Index framework is built on a clear principle: we assess the customer experience, not internal capabilities. Everything we measure is observable from the outside – the way a real customer would encounter a brand across channels and touchpoints.

This is an important distinction. We do not evaluate what a brand intends to do, or what its technology stack is capable of. We evaluate what is actually visible, accessible, and functional at a given time.

HOW WE COLLECT THE DATA

Our data is gathered through four complementary methods.

Mystery shopping provides a ground-level view of in-store service, based on real interactions. In 2026, this includes observation and dialogue with staff, but no actual purchases or returns.

Desk research provides a structured, multi-perspective review across the remaining touchpoints in the framework.

Digital performance analysis covers website and social media effectiveness – from page speed and UX to content quality and digital marketing execution.

AI-assisted data collection captures online experiences through automated workflows. These simulate user journeys, record interactions, and generate binary ('yes'/'no') outputs based on predefined criteria.

HOW WE CALCULATE THE SCORE

The Omnichannel Index 2026 uses a binary scoring system. Each touchpoint receives a 'yes' or a 'no'.

Scores are expressed as numbers between 1 and 100, with 100 being the highest possible score. If a company scores 'yes' on 42 out of 74 touchpoints, its total score is calculated as (42/74 × 100). The same logic applies to phase scores and discipline scores, calculated proportionally within the relevant touchpoint subset.

WHAT'S NEW IN 2026

The Omnichannel Index evolves with the market. The 2026 edition reflects two years of significant change in customer behavior, technology adoption and market maturity – and the framework has been updated to match.

01

AI AND VIDEO AS DEDICATED DISCIPLINES

In previous editions, AI and video appeared at the edges of the analysis, as capabilities referenced within other disciplines rather than measured in their own right. That's changed.

AI is introduced as a standalone discipline, designed to assess how well brands are prepared for AI-mediated commerce. It focuses exclusively on observable, customer-facing capabilities: how visible a brand is to LLMs and AI agents, whether its search and support functions understand natural language, whether it offers visual or multimodal search, and how effectively AI is used in service and guided selling.

Video is introduced as a standalone discipline to reflect the growing role of video as a primary channel for discovery and evaluation. It examines how brands integrate video into the commerce experience – from format diversity and publishing cadence to live shopping and video on product pages.

At the same time, the Consumer App discipline has been removed. An app alone does not reliably enhance the customer experience, and app-related data collection has proven limited in validity. Relevant touchpoints have been absorbed elsewhere in the framework where they directly serve the customer journey.

02

REFINED SCORING METHODOLOGY

Previous editions used a weighted scoring system with values of 0, 1 or 2, allowing for partial credit on selected touchpoints. In 2026, the index moves to a fully binary system – yes or no on every touchpoint. This improves data reliability and ensures every score reflects what is genuinely in place, not a degree of interpretation

03

UPDATED TOUCHPOINT FRAMEWORK

The 2026 edition moves from 70 to 74 touchpoints. Selected touchpoints from previous editions have been consolidated or removed where they no longer reflect current market realities. New touchpoints have been added in areas where customer expectations and brand capabilities have shifted materially since 2024 – including conversational shopping, semantic search, visual search, BOPIS within four hours and climate-friendly shipping options. 18 touchpoints have been automated for the first time in order to improve data accuracy and collection efficiency. The framework is developed in collaboration with Google, ensuring it remains a credible and forward-looking benchmark.

04

SHARPENED INDUSTRY SCOPE

2 industries have been removed from the 2026 edition to sharpen focus on sectors with comparable customer journeys and stronger omnichannel relevance. The index now covers 11 industries, allowing for more meaningful like-for-like comparisons across markets.

6	Markets
373	Brands & retailers
11	Industries
9	Disciplines
5	Phases of the customer journey
74	Omnichannel touchpoints
27.602	Analysed data points

How to use the index

The Omnichannel Index is not just a benchmark. It is a strategic tool to understand where performance is won and lost. It provides an outside-in view of the market, based on 373 brands.

That makes it possible to see patterns that are difficult to identify internally – where capabilities are underutilised, and where the gap between average and leading brands is created.

The Index does not replace internal data. It provides context. It shows where to look, where to challenge current priorities, and where improvement is most likely to create impact.

01

START BY UNDERSTANDING YOUR POSITION

Go to the back of the report, find your brand and check your score:

- *How far are you from the average (38%)?*
- *How far are you from the top performers (~70%)?*

This gap puts your performance into perspective. It shows how far you are from the level where customer experience starts to differentiate and defines your improvement potential.

02

BENCHMARK – AND BROADEN YOUR PERSPECTIVE

Compare your performance within your industry to understand where you are losing to direct competitors. But don't stop there. Optimising for industry average is how you stay average.

Customers compare you to the best experience they have had, regardless of industry. By looking across all 11 industries, the Index highlights where expectations are being set and where the market is still underdeveloped.

This is where it becomes clear where to focus – not on improving the basics, but on strengthening the parts of the journey where others in your industry still underdeliver.

03

IDENTIFY WHERE VALUE IS NOT BEING REALISED

Use the nine disciplines and five journey phases to pinpoint where performance is weakest and where gaps persist.

In many cases, the issue is not missing capability, but capabilities that are not fully translated into the customer experience. These gaps often define the difference between average and leading brands.

2026 Omnichannel Index Overall Winners

THIS YEAR'S TOP PERFORMERS AND WHAT SETS THEM APART

The top performers in this year's Index show what good really looks like in practice. Not through isolated strengths, but through their ability to connect the journey end-to-end. In the following, we take a closer look at what sets them apart – and where they go further than the rest.

1st

IKEA

Score: 72%

Scoring 72% overall, IKEA tops the 2026 Omnichannel Index by doing what most brands struggle to do consistently: delivering a high-performing experience across every phase of the customer journey. No single discipline carries the result – it's the combination that counts.

2nd

matas

Score: 69%

Matas is the only brand in the top 10 to score a perfect 100% on Purchase – every touchpoint passed, no friction. Paired with one of the strongest loyalty programmes in Danish retail and a clear edge in discovery, it's an end-to-end consistency that earns second place.

3rd

VERKKO KAUPPA .COM

Score: 68%

Electronics is a category where trust matters. Customers research carefully, compare options and expect support when things go wrong. Verkkokauppa.com has built its omnichannel experience around exactly that – scoring consistently strong across the full journey, with particular depth in service, fulfilment and evaluation.

IKEA *(72%)*

IKEA SCORES 80% ON AI

That's nearly four times the index average, and the biggest gap between IKEA and the rest across all nine disciplines. While most brands are still finding their footing on AI-facing capabilities, IKEA is already well ahead.

FOUR STANDOUT CAPABILITIES

These are touchpoints IKEA passes that almost no other evaluated brand does. Each one points to a level of commerce maturity that's worth getting inspired by.

01
VISUAL SEARCH ON-SITE

Customers can search by image – only 3 in 100 brands offer this.

02
MOBILE POS IN-STORE

Staff can complete transactions anywhere on the shop floor, not just at a fixed till – offered by only 5% in the Index.

03
SAME-DAY DELIVERY

A fulfilment promise that 93% retailers still struggle to make.

04
LIVE SHOPPING

Real-time, shoppable content that blends inspiration with instant purchase – offered by just 10%.

SCORE BY PHASE

AWARENESS	69%
EVALUATION	69%
PURCHASE	83%
SERVICE	64%
LOYALTY	80%

SCORE BY DISCIPLINE

SUSTAINABILITY & COMPLIANCE	83%
AI	80%
STOCK DATA & FULFILMENT	75%
CUSTOMER SERVICE & IN-STORE SUPPORT	73%
CRM & CUSTOMER DATA	71%
DIGITAL MARKETING	67%
VIDEO	67%
BEST PRACTICE UX	63%
TECHNICAL PERFORMANCE & MASTER DATA	63%

Matas *(69%)*

ONE OF THE STRONGEST LOYALTY SCORES IN THE INDEX

At 73% on Loyalty – 36 points above the field average – Matas Club is a programme that goes well beyond points. Strong CRM activation, behaviour-based personalisation and retention mechanics all contribute.

FOUR STANDOUT CAPABILITIES

Matas has invested in capabilities that most brands are still treating as future priorities. Taken together, they reflect a brand that's building for the full customer experience – online, in-store and in the moment.

01
LIVE SHOPPING

Social-style live content to showcase products and let customers shop in the moment – something only 10% of brands do.

02
MOBILE POS IN-STORE

Letting staff check out customers anywhere in the store, so there's no need to queue. Offered by just 5%.

03
SAME-DAY DELIVERY

Getting products to customers the same day they buy – still only possible for 7% of brands in the Index.

04
IN-STORE EVENTS & ACTIVITIES

Creating reasons to visit through events, expert guidance, and hands-on experiences that build stronger customer relationships – something only 14% manages to do.

SCORE BY PHASE

AWARENESS	69%
EVALUATION	62%
PURCHASE	100%
SERVICE	64%
LOYALTY	73%

SCORE BY DISCIPLINE

DIGITAL MARKETING	83%
CUSTOMER SERVICE & IN-STORE SUPPORT	82%
VIDEO	78%
STOCK DATA & FULFILMENT	75%
CRM & CUSTOMER DATA	71%
BEST PRACTICE UX	69%
TECHNICAL PERFORMANCE & MASTER DATA	63%
SUSTAINABILITY & COMPLIANCE	33%
AI	20%

Verkkokauppa.com *(68%)*

SERVICE IS THEIR LEAD DIMENSION – 36 POINTS ABOVE THE FIELD

A 73% Service score reflects a genuinely strong after-sales infrastructure: repair services, fast returns, in-store support and response times that competitors struggle to match. For an electronics retailer, post-purchase experience is everything.

FOUR STANDOUT CAPABILITIES

Verkkokauppa.com has built for depth – in service, sustainability and discovery. These capabilities reflect a retailer that thinks well beyond the transaction.

01
REFURBISHED PRODUCTS

Selling refurbished products brings sustainability into everyday buying decisions – something just 11% offer.

02
ENDLESS AISLE IN-STORE

Giving customers access to the full online range from the store, so they're never limited by shelf space. Offered by just 12% of brands.

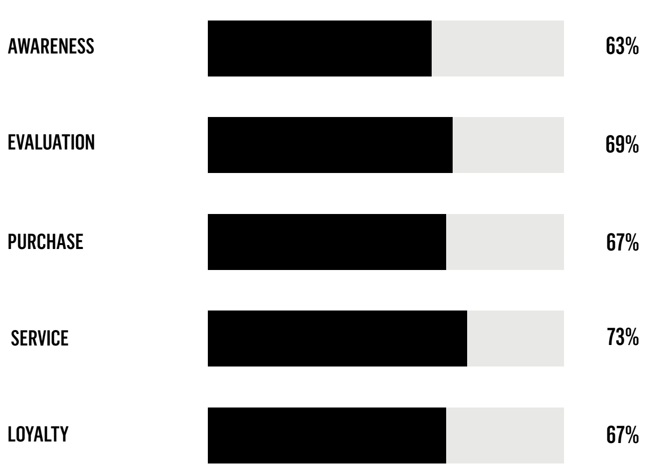
03
SAME-DAY DELIVERY

Only 7% of brands can match this speed, giving Verkkokauppa.com a clear edge when immediacy drives purchase decisions.

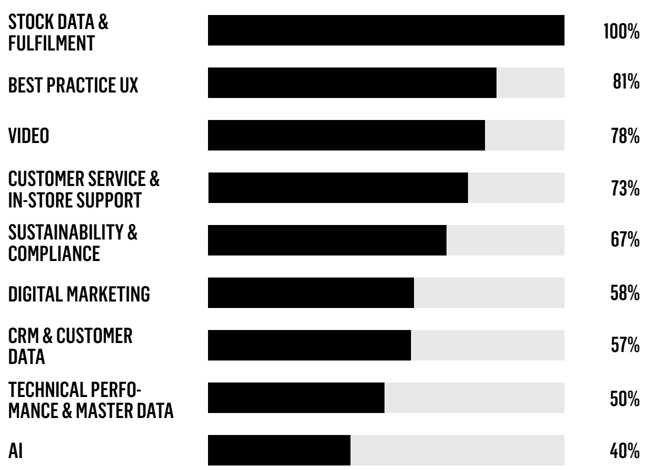
04
LIVE SHOPPING

Using social-style live content to showcase products and help customers buy in the moment. Only 10% of brands do this.

SCORE BY PHASE



SCORE BY DISCIPLINE

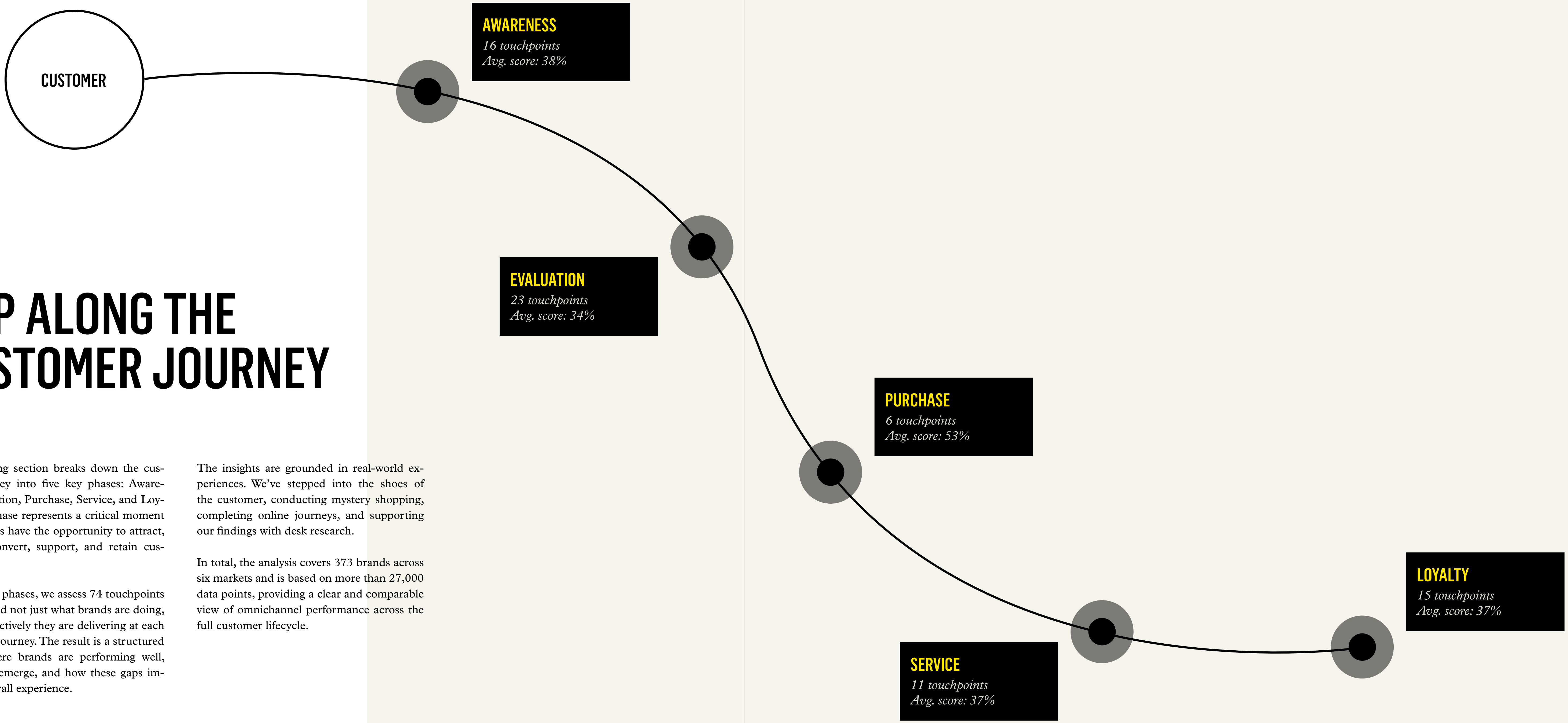


GETTING AHEAD IN OMNICHANNEL

Looking across the top performers, the pattern is consistent: strong baseline execution is a prerequisite, but not enough on its own. What separates the leaders is how they build on that foundation, with clearly defined strengths in the moments that matter most, always supported by a journey that works end-to-end.

For most brands, the challenge is twofold: closing foundational gaps while making deliberate choices about where to differentiate. Because in a landscape where the basics are increasingly expected, advantage comes from how well you connect and elevate the experience.

In the next sections, we take a step back and look across 373 brands and six markets to see where the real gaps are – and where the biggest opportunities to move ahead are emerging.



HOP ALONG THE CUSTOMER JOURNEY

The following section breaks down the customer journey into five key phases: Awareness, Evaluation, Purchase, Service, and Loyalty. Each phase represents a critical moment where brands have the opportunity to attract, convince, convert, support, and retain customers.

Across these phases, we assess 74 touchpoints to understand not just what brands are doing, but how effectively they are delivering at each stage of the journey. The result is a structured view of where brands are performing well, where gaps emerge, and how these gaps impact the overall experience.

The insights are grounded in real-world experiences. We've stepped into the shoes of the customer, conducting mystery shopping, completing online journeys, and supporting our findings with desk research.

In total, the analysis covers 373 brands across six markets and is based on more than 27,000 data points, providing a clear and comparable view of omnichannel performance across the full customer lifecycle.

Awareness

The following touchpoints have been selected because they hold significant importance for this specific category.

The awareness phase is where demand is created. At any given time, most potential customers are not actively looking to buy, making it critical for brands to stay visible and build familiarity long before purchase intent arises. With an average performance score of 38%, there is clearly significant untapped potential across the board.

Activity levels are high. 76% publish more than 20 times per month across platforms, and 92% using visual formats like Reels, Shorts and TikToks. In addition, 66% score 90 or above on Lighthouse SEO, meaning they're technically well-positioned to be found through search.

Despite all that activity, only 10% managed to grow their brand searches by 10% or more over the past 12 months. In other words, most brands produce content without generating brand demand. They are reaching audiences but not staying top of mind. As discovery becomes increasingly AI-driven, brand search becomes an even stronger signal of whether a brand is truly breaking through.

Video tells a similar story. 43% use multiple video formats, but only 12% of brands maintain a consistent publishing cadence, and just 10% have explored live shopping – one of the fastest-growing formats in retail right now. Without consistency and experimentation, content does not build familiarity or stay relevant over time.

At the same time, brands are not fully set up for how discovery is evolving. AI readability sits at 42%, meaning much content is not structured in a way that AI systems can easily interpret or surface. Only 14% use deep linking – taking users directly from content to a product or page – which forces customers to search again after clicking, increasing the risk they drop off.

These issues are connected. Brands create content, but it is not remembered, not prioritised by algorithms, and not easy to act on. Ultimately, awareness is not just about being visible – it is about being recognised and easy to choose. Most brands are doing the first, but not the second.

TOP PERFORMERS

1st	2nd	3rd
81%	75%	69%

HIGHLIGHTS

92%
incorporate visual formats (Reels, Shorts, TikToks) into their social media strategy.

76%
post more than 20 times per month across platforms.

66%
reach a 90+ SEO score on Lighthouse.

ROOM FOR IMPROVEMENT

10%
grew brand searches by 10%+ in 12 months.

10%
use video live shopping.

12%
maintain a consistent video publishing cadence.

INDUSTRY PERFORMANCE BREAKDOWN: AWARENESS

JEWELLERY & WATCHES	51%
ELECTRONICS	43%
DEPARTMENT STORES	41%
FASHION	40%
SPORT & LEISURE	40%
BEAUTY & PHARMACY	38%
FOOTWEAR	36%
HOUSE & GARDEN	35%
FURNITURE & HOME INTERIOR	34%
PETS, GIFTS & HOBBY	33%
KIDS	32%
AVERAGE	38%

Evaluation

In this phase, we measure how well brands help customers compare, understand, and confidently choose between products.

The evaluation phase is where customers do their homework. They compare options, explore product details, read reviews, and decide whether a brand is trustworthy enough to buy from. This is the phase where great product presentation, smart personalisation and a fast, frictionless experience can make or break a sale.

With an average performance score of 35%, the lowest of any phase in this year's index, the evaluation phase is where the most potential is being left on the table.

Technical Performance works well with 76% passing Chrome UX desktop site speed benchmarks under 2.5 seconds and 73% meeting the equivalent standard on mobile.

Core features are broadly adopted, with 78% of brands using diverse and relevant image formats on their product detail pages, and 73% offering a wishlist or favourites option – basic UX features that support comparison and consideration.

But when we look beyond the basics, gaps start to appear. Visual search – the ability to find products through images rather than keywords – is offered by just 3%. Only 6% show visual user-generated content on product pages, despite its strong ability to build trust and reduce uncertainty at the point of decision. And while AI chatbots are present on 26% of sites, conversational shopping features that actually guide customers through a purchase sit at just 13%.

Personalisation tells a similar story. Only 9% have behaviour-based search, and just 13% show personalised product recommendations. For a phase that is fundamentally about helping customers make the right decision, these numbers suggest most brands are leaving customers to figure it out on their own.

Ultimately, brands are equipped to support evaluation but rarely go beyond the basics. As a result, they meet expectations, but struggle to exceed them or stand out at the moment where preference is formed.

TOP PERFORMERS

1st	73%	IKEA
2nd	69%	Verkkokauppa.com, Kjell & Company
3rd	65%	HiFi Klubben

HIGHLIGHTS

78%
use diverse and relevant image formats on product detail pages.

76%
pass Chrome UX desktop site speed benchmarks under 2.5 seconds.

73%
offer a wishlist or favourites option.

ROOM FOR IMPROVEMENT

3%
offer visual search (image-based product discovery).

6%
show visual user-generated content on product detail pages.

16%
use filters to display local inventory only.

INDUSTRY PERFORMANCE BREAKDOWN: EVALUATION

ELECTRONICS	45%
FURNITURE & HOME INTERIOR	39%
KIDS	35%
JEWELLERY & WATCHES	35%
FOOTWEAR	34%
SPORT & LEISURE	34%
HOUSE & GARDEN	34%
FASHION	32%
PETS, GIFTS & HOBBY	31%
BEAUTY & PHARMACY	31%
DEPARTMENT STORES	31%
AVERAGE	35%

Purchase

In this phase, we measure how easily and flexibly customers can complete a purchase – across both online and physical channels.

The purchase phase is the moment of truth. And with an average performance score of 55%, this is the strongest phase in the index. Online purchase mechanics are mature, and most brands have clearly invested in making the checkout experience smooth and flexible.

78% allow customers to buy now and pay later online, 68% use up- and cross-selling in the basket, and 60% support omnibasket – allowing customers to start a purchase in one channel and complete it in another. This reflects a strong understanding of how customers shop today, moving across devices and touchpoints before completing a purchase.

But step into a physical store, and a very different picture emerges. Mobile POS – the ability for staff to process a payment on the shop floor without sending a customer to a fixed till – is available in just 5% of cases. Just 51% enable staff to arrange home or in-store delivery on behalf of a customer, and 41% do not communicate click-and-collect options on the product detail page, even when the capability exists.

In isolation, these gaps might not seem alarming but consider what they mean in practice. A customer finds a product they like in-store, but not in the right size or colour. If store staff cannot immediately offer to order or deliver it, the sale is lost – not because the product isn't available, but because the systems and tools to complete the transaction aren't in place.

The same applies to click-and-collect. When this option is not clearly presented, the link between digital intent and physical fulfilment weakens, leading to missed conversions.

The solution is not new technology, but better use of it. The capabilities exist but are not consistently deployed where they matter most.

Ultimately, brands perform well in isolated channels, but struggle to connect them. And that matters, as omnichannel customers, according to Google data, are significantly more valuable, spending up to 3x more than store-only and 7x more than online-only shoppers.

TOP PERFORMERS

1st 81%

CARLINGS, matas

2nd 75%

&OTHER STORIES, Acne Studios, ANTON SPORT, BYGGER'N, chaussea, Cubus, coolblue

HIGHLIGHTS

78%
offer Buy Now, Pay Later online.

68%
use up- and cross-selling in the mini-basket.

60%
support omnibasket, allowing customers to pick up their basket seamlessly across devices.

ROOM FOR IMPROVEMENT

5%
offer Mobile POS.

51%
can arrange home or in-store delivery via staff.

59%
communicate click-and-collect on the product detail page.

INDUSTRY PERFORMANCE BREAKDOWN: PURCHASE

ELECTRONICS	67%
JEWELLERY & WATCHES	63%
FASHION	56%
FOOTWEAR	55%
BEAUTY & PHARMACY	54%
SPORT & LEISURE	53%
KIDS	51%
HOUSE & GARDEN	51%
FURNITURE & HOME INTERIOR	49%
PETS, GIFTS & HOBBY	48%
DEPARTMENT STORES	39%
AVERAGE	55%

Service

In this phase, we measure how well brands support customers after the purchase, across delivery, returns, and support.

The service phase is the moment when a brand's operational backbone is put to the test. Was it easy to return an item? Did the customer get help when needed? Was the item delivered on their terms? These are all touchpoints that customers remember long after the purchase is done. With an average performance score of 38%, there is clearly room to do more.

The fundamentals are largely in place. 74% support click-and-collect or delivery to store at checkout, and 73% offer Buy Online, Return In-Store (BORIS). These are the cornerstones of a connected post-purchase experience, and it's good to see them so widely adopted. But beyond those foundations, the picture thins out quickly.

Only 7% offer same-day delivery – a growing expectation set by marketplace competitors that most brands are not yet matching. Just 9% provide digital support outside of opening hours, meaning the vast majority of customers who have a question or a problem on a Sunday evening are left waiting.

This gap is also visible in fulfilment. Ship-from-store – the ability to fulfil online orders directly from physical stores – is used by only 25%. This is a missed opportunity, as it can significantly improve delivery speed, make better use of store inventory, and reduce stock inefficiencies across channels.

Increasingly, this phase also plays a role in helping customers make more informed and responsible choices – both during and after the purchase. While 59% offer repair guides, the wider ecosystem required to support repair and reuse is still underdeveloped. Only 16% offer climate-friendly shipping options, and just 27% have digital product passports in place – a digital record containing key information about a product's origin, materials, and lifecycle. This is a striking gap, considering that 67% of global consumers say they would switch brands due to a lack of sustainability commitment (Capgemini, 2025).

Ultimately, most brands deliver on the basics, but fall short on flexibility, availability, and added value, leaving service as an operational necessity rather than a true differentiator.

HIGHLIGHTS

74%
offer click-and-collect or delivery to store at checkout.

73%
support BORIS (buy online, return in-store).

59%
provide online repair guides.

ROOM FOR IMPROVEMENT

7%
offer same-day delivery.

9%
provide digital support outside of opening hours.

16%
offer climate-friendly shipping options.

TOP PERFORMERS

1st – 73%

ginatricot, NORRØNA, Nudie Jeans co, VERKKO KAUPPA .COM, Cubus, IKEA

2nd – 64%

ÅHLÉNS, bahne, Cervera

INDUSTRY PERFORMANCE BREAKDOWN: SERVICE

ELECTRONICS	45%
FOOTWEAR	44%
HOUSE & GARDEN	39%
KIDS	38%
FASHION	37%
SPORT & LEISURE	37%
FURNITURE & HOME INTERIOR	36%
JEWELLERY & WATCHES	36%
BEAUTY & PHARMACY	32%
DEPARTMENT STORES	31%
PETS, GIFTS & HOBBY	26%
AVERAGE	38%

Loyalty

In this phase, we measure how well brands have the mechanics in place to build long-term, meaningful relationships.

The loyalty phase is where relationships are either built or lost. A customer has bought from you – now comes the harder task: making the customer come back. With an average performance score of 37%, loyalty remains one of the most underdeveloped phases in the index.

The foundational mechanics are largely in place. 77% offer monetary benefits such as discounts, points, or rewards, and 77% prompt sign-up at checkout. 59% also support in-store sign-up, showing that most brands are equipped to capture customers across channels.

However, these approaches are heavily skewed towards short-term incentives. Monetary rewards are effective at driving initial engagement, but they rarely create lasting loyalty. A points programme or a 10% welcome discount may trigger a first purchase, but it does little to build a reason to return – and over time, can put pressure on margins without strengthening the relationship.

In contrast, benefits that foster deeper engagement remain limited. Only 20% offer emotional or experience-driven incentives such as exclusive access, limited editions, or community initiatives. Experiential loyalty, such as in-store events or activities, is even rarer at 14%.

When looking at data capture, the picture is equally uneven. 77% recruit to newsletter at checkout, but only 17% recruit earlier in the journey. And even when data is collected, it is underutilised: only 27% send automated, behaviour-based emails, meaning many brands collect loyalty data without activating it.

Mobile is another underleveraged channel. App adoption sits at 32% and in-store app features at 23%, suggesting that while mobile can be a powerful loyalty touchpoint for some categories, it remains underdeveloped or less relevant for others.

Ultimately, most brands are set up to capture customers, but not to build lasting relationships. Loyalty is treated as a transactional layer, rather than a strategic lever for retention and long-term value.

TOP PERFORMERS

HIGHLIGHTS

77 %
offer monetary benefits for loyalty members.

77%
prompt newsletter or club sign-up at checkout online.

59%
assist with customer sign-up in store.

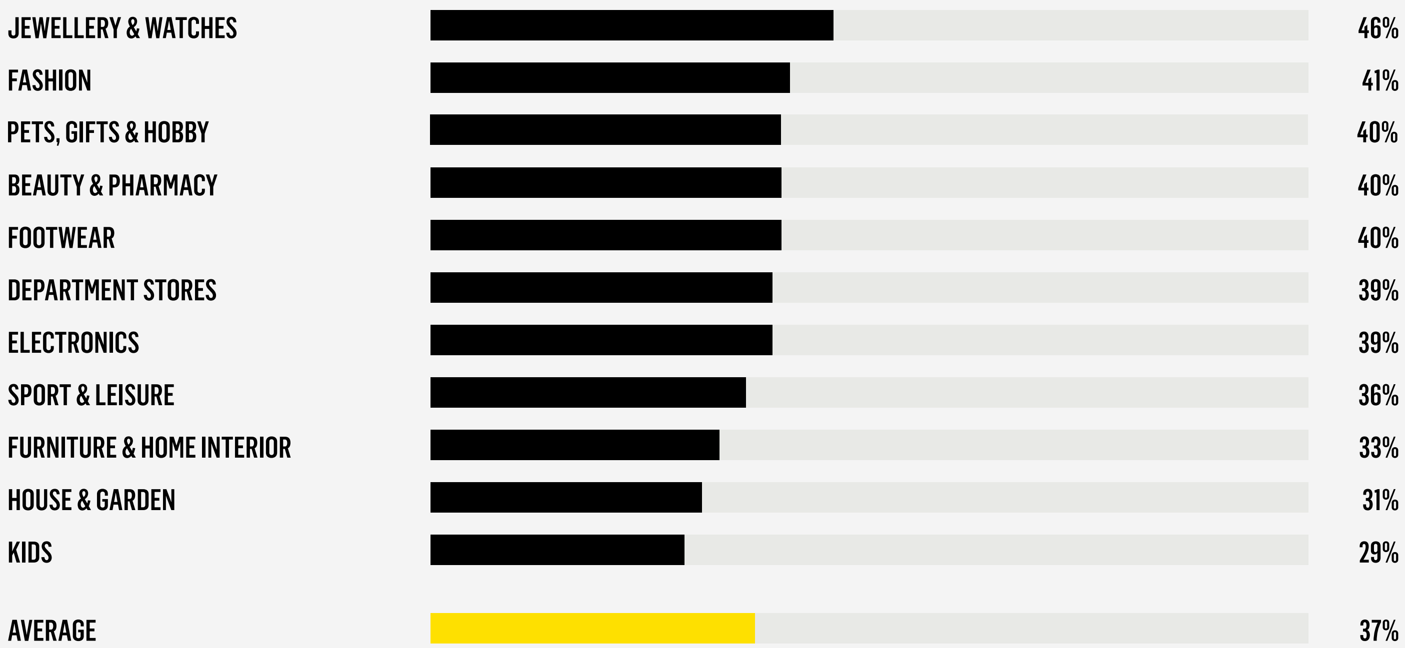
ROOM FOR IMPROVEMENT

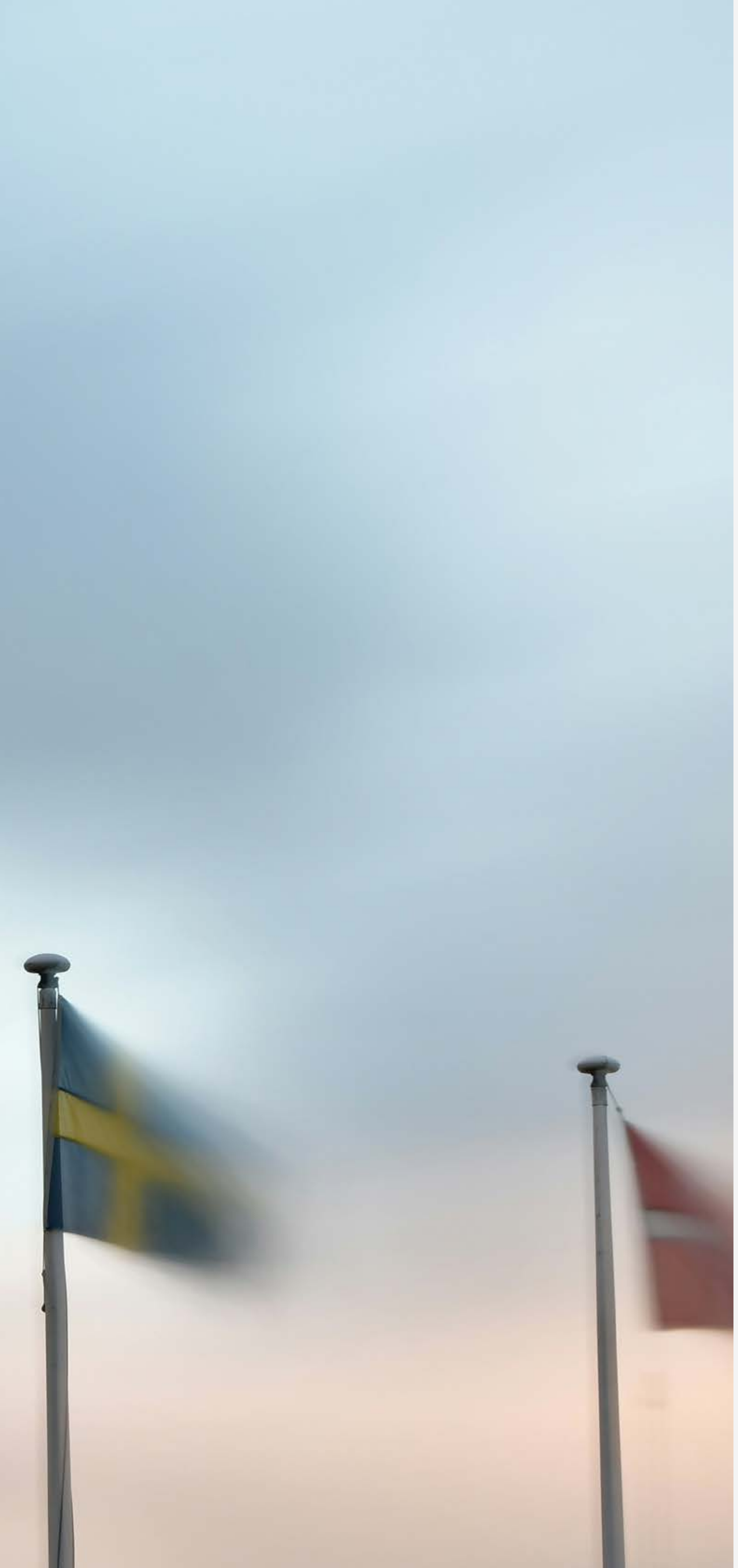
14%
offer a service or in-store activity as part of their loyalty proposition.

17%
recruit loyalty members on product listing or product detail pages.

20%
offer emotional benefits such as exclusive access, charity initiatives or limited editions.

INDUSTRY PERFORMANCE BREAKDOWN: LOYALTY





Countries

While the overall index provides a unified view of omnichannel performance, each market reveals its own patterns of maturity, priorities, and expectations.

Looking across markets reveals more than just differences – it shows how customer expectations are shaped locally, and how brands respond to them. What is considered a baseline in one market may still be a differentiator in another.

By examining top performers within each country, it becomes clear how leading brands translate these priorities into strong execution, offering a practical view of what good looks like in different contexts, and where the biggest opportunities to stand out lie.

Country Performance Overview

BELGIUM	40%
SWEDEN	39%
THE NETHERLANDS	39%
NORWAY	36%
DENMARK	36%
FINLAND	36%

Markets side by side

DISCIPLINE	BELGIUM	DENMARK	FINLAND	THE NETHERLANDS	NORWAY	SWEDEN
Best Practice UX	*48%*	*44%*	*48%*	*48%*	*45%*	*46%*
Technical Performance & Master Data	*44%*	*42%*	*47%*	*43%*	*46%*	*49%*
Digital Marketing	*47%*	*43%*	*40%*	*53%*	*37%*	*43%*
Stock Data & Fulfilment	*48%*	*41%*	*42%*	*43%*	*46%*	*40%*
CRM & Customer Data	*36%*	*37%*	*33%*	*38%*	*36%*	*38%*
Customer Service & In-Store Support	*37%*	*33%*	*30%*	*24%*	*34%*	*29%*
Video	*39%*	*27%*	*31%*	*39%*	*23%*	*26%*
Sustainability & Compliance	*27%*	*25%*	*31%*	*21%*	*27%*	*44%*
AI	*19%*	*21%*	*10%*	*22%*	*19%*	*19%*

THE STANDOUTS

The Netherlands is the clear standout in Digital Marketing, scoring 53% – the highest single-discipline score in the comparison. It's a market where performance-driven retail has matured and competition for consumer attention is intense.

Sweden leads Sustainability & Compliance at 44%, more than 10 percentage points ahead of any other market. That gap reflects a market where sustainability has moved beyond brand messaging into measurable, customer-facing execution, driven by both regulatory pressure and genuinely higher consumer expectations.

THE CONSISTENT PERFORMERS

Belgium doesn't peak dramatically in any one area, but holds its ground across almost everything, leading or matching the index high in Best Practice UX, Stock Data & Fulfilment and Customer Service & In-Store Support.

Denmark shows a similar steadiness, with solid scores across the board – the hallmark of a market where the fundamentals are in place, and where the next wave of investment is beginning to take shape.

THE OPERATIONAL LEADERS

Norway and Finland both score well on Technical Performance and Stock Data & Fulfilment. But that operational strength hasn't fully carried through to customer-facing disciplines, particularly Digital Marketing and Customer Service, where both markets have clear room to move.

THE SHARED GAPS

What unites all six markets is not just what they do well – but where they consistently fall short.

AI remains the clearest gap, with no market exceeding 22% and Finland at just 10%. Despite its growing importance in shaping discovery, personalisation and service, adoption is still early and fragmented.

Customer Service & In-Store Support is another weak point across the board, with scores ranging from 24% to 37%. While fulfilment is well developed, the service layer – especially in-store – is not yet fully leveraged to support or extend the customer journey.

Video also remains underutilised, with all markets scoring below 40%. This reflects a broader hesitation to invest in richer, more engaging content formats that support inspiration and decision-making.

Taken together, these gaps point to a common pattern: markets have largely mastered the mechanics of omnichannel – but are still catching up when it comes to creating more assistive, engaging and experience-led journeys.

Denmark

AVG. SCORE: 36%

Denmark performs consistently across the index, but without clear areas of leadership. While other markets pull ahead in specific disciplines – the Netherlands in Digital Marketing and Sweden in Sustainability – Danish brands tend to cluster around the average. This creates a competitive landscape where many experiences work well, but few stand out.

Danish brands perform well where capabilities are scalable and commercially proven. 86% are active on newer social formats, 70% post frequently, and 85% push newsletter or loyalty sign-ups, showing a strong focus on visibility and data capture. In the buying journey, 79% use personalised cross-sell, while 72% support in-store returns and 67% offer wishlists.
The gap becomes clear in the moments that influence decisions. Search and product discovery remain largely static. Only 5% use behaviour-based search, 10% support natural language search, and 4% offer visual search. Few brands go beyond basic filtering or actively guide customers through complex choices.

At the same time, the market is not yet adapting to how discovery is evolving. AI-driven interfaces, assistants and recommendation engines are starting to reshape how customers find and evaluate products. Yet most Danish brands still rely on traditional navigation and search, with limited focus on structured data, content quality or AI visibility.

In-store, the experience is still weakly connected to digital. Capabilities such as endless aisle, store-assisted ordering and real-time stock visibility are not widely used, missing an opportunity to make stores a more active part of the buying journey. High-intent channels like Google Local Inventory Ads are also underutilised, limiting visibility when customers are closest to purchase.

The next step is not more optimisation of checkout or fulfilment, but to rebalance the journey. Strengthen awareness, improve evaluation, and use service and loyalty to build longer-term relationships. At the same time, stepping beyond the basics will be key – investing in AI-driven experiences, smarter personalisation and more connected store journeys.

HIGHLIGHTS

86%
are active on visual social formats (Reels, Shorts, TikTok).

79%
show at least two personalised up- and cross-selling opportunities on PDP.

72%
support in-store returns.

ROOM FOR IMPROVEMENT

5%
use behaviour-based search.

4%
offer visual search.

1%
show user-generated content on PDPs.

TOP PERFORMERS

1st — 72%

IKEA

IKEA leads the Danish market with consistent strength across the entire customer journey. Rather than excelling in isolated touchpoints, IKEA's advantage lies in orchestration – connecting digital channels, app engagement, and fulfilment into one coherent experience. This level of integration sets the benchmark: omnichannel is not about individual capabilities, but about how well they work together.

2nd — 69%

matas

Matas stands out through its ability to activate customer data at scale. Strong performance in Digital Marketing and Loyalty, supported by solid CRM & Customer Data, reflects a clear focus on turning insights into relevant, personalised experiences. In contrast, lower scores in AI and Sustainability & Compliance point to untapped opportunities. As expectations evolve, strengthening these areas will be key to staying relevant and competitive.

3rd — 58%

HiFi Klubben

Hifi Klubben demonstrates how strong execution on key purchase drivers can simplify even complex buying journeys. High scores in Purchase and AI (66 percentage points above average), supported by solid UX, create a clear and effective path to conversion. However, in a category where guidance and reassurance matter, the lower score in Customer Service & In-Store Support signals a gap beyond the transaction. Clarity may win the sale, but without stronger support, the overall experience risks falling short.

Sweden

AVG. SCORE: 39%

Swedish brands and retailers show a clear pattern: strong execution in the fundamentals that make omnichannel work, combined with stronger technical foundations and a more advanced approach to sustainability.

Sweden leads in technical performance, with 84% meeting mobile site speed benchmarks and 81% on desktop, creating fast and reliable experiences across devices. This gives Swedish brands a strong online foundation in an increasingly performance-driven landscape.

Sustainability is another defining characteristic. Sweden has the highest score across markets, supported by a wide adoption of touchpoints that bring sustainability closer to the customer. 51% already provide digital product passports, and a high share offer repair-related services and transparency around products. This reflects a market where sustainability is not just communicated, but increasingly operationalised.

At the same time, Swedish brands have built a solid omnichannel foundation. 95% offer 'buy now, pay later' and 78% support in-store returns. CRM and loyalty are well established, and services like click & collect and store integration are widely available. The basics work – and they work consistently.

Where the gaps appear is in the next layer of the experience. Personalisation remains limited, with only 8% offering personalised homepage experiences and relatively low adoption of more advanced recommendation or guidance tools. The same applies to the experiential layer: 15% use AI assistants, 11% have natural language search, 3% offer visual search and user-generated content are still niche capabilities.

In-store, the gap is even clearer. While core services are in place, more advanced capabilities such as endless aisle and mobile POS are almost non-existent. This limits the role of stores as active, connected parts of the journey.

Swedish brands are good at building reliable, transparent and well-functioning experiences, but lag the capabilities that make those experiences more dynamic, guided and differentiated. The opportunity is to build on these foundations and move into the next phase: stronger personalisation, more intelligent discovery, and more connected in-store experiences.

HIGHLIGHTS

84%
meet mobile site speed benchmarks.

51%
provide digital product passports.

95%
offer 'buy now, pay' later online.

ROOM FOR IMPROVEMENT

8%
show personalised recommendations on the homepage.

3%
offer visual search.

1%
support mobile POS on the shop floor.

TOP PERFORMERS

1st — 70%

IKEA

IKEA delivers a consistently high performance across the entire journey, executing at scale without weak links. Strong scores in Loyalty, AI, and CRM & Customer Data highlight a business that not only understands its customers but actively uses that insight to drive engagement and long-term value. The only notable gap appears in Service (36%), suggesting that while IKEA excels at driving and supporting the purchase, there is still room to strengthen the experience beyond it.

2nd — 57%

KICKS

Kicks shows that a focused specialist can compete at the top of the market without the scale of a generalist retailer. A strong Purchase score, supported by solid UX and Technical Performance, creates a smooth and reliable path to conversion. At the same time, lower scores in Customer Service & In-Store Support and in the Awareness phase (38%) highlight clear gaps when looking beyond the transaction itself.

3rd — 55%

Kjell & Company

Kjell & Company stands out with a strong and well-executed foundation across the core experience, but what truly sets them apart is leadership in Sustainability & Compliance (83%). In a category where trust and product responsibility matter, this signals a clear commitment that goes beyond the transaction. At the same time, lower scores in Digital Marketing and Awareness point to an opportunity to strengthen visibility and inspiration earlier in the journey.

Norway

AVG. SCORE: 36%

Norway is a market shaped by its geography. With vast distances between cities and a dispersed population, 63% of Norwegian consumers rely on online research before committing to a purchase (Google, 2024). That makes the digital journey particularly important: customers need to know what is available, where it is available, and whether it is worth the trip.

Norwegian brands and retailers respond well to that need – but mainly at the end of the journey. Purchase is the strongest phase at 53%, while Awareness is the weakest at 29%. In other words, once a customer has decided, the experience works. Getting them there is the harder part.

The strength in fulfilment is clear. 80% show store availability directly on the product page, and 80% offer click & collect or delivery to store. 65% support in-store returns, and more than half enable store staff to place online orders for customers.

There are also solid signs that channels are starting to work together. 51% store customers' baskets across devices, 67% promote online initiatives in-store and 61% give staff access to order history. It's practical, and it improves the experience, but it's still mostly focused on service and fulfilment.

The bigger gap sits earlier in the journey. Norwegian brands are present – 93% are active on newer social platforms and 70% post frequently – but that visibility does not translate into demand. Only 6% have grown brand searches significantly. Formats that drive engagement are still underused: 13% use live shopping, and just 1% maintain a consistent video strategy.

The same pattern shows up in how customers make decisions. Basic elements are in place – 64% perform well on SEO and 58% use customer reviews – but the tools that actually help customers narrow choices are rare. Only 6% use behaviour-based search, 3% include user-generated content on product pages, and 1% offer visual search. Even AI is still early, with 12% using it as a guided sales assistant.

The next step for Norwegian brands and retailers is to strengthen the parts of the journey that come before conversion, attracting customers, helping them compare, and making decisions easier.

HIGHLIGHTS

80%
show store availability on PDP and offer click & collect.

65%
offer online purchasing with in-store returns.

67%
show at least two personalised up- and cross-selling opportunities on PDP.

ROOM FOR IMPROVEMENT

3%
show user-generated content on PDP.

6%
use behaviour-based search.

12%
use AI as a guided sales assistant.

TOP PERFORMERS

1st — 58% — IKEA

IKEA tops the Norwegian market, but the data tells a more nuanced story. Compared to its Danish and Swedish counterparts, IKEA Norway scores lower across several disciplines, most notably in CRM & Customer Data and Evaluation. It's a useful reminder that a strong global brand does not automatically translate into consistent local execution. Market-level investment and prioritisation still matter.

2nd — 55% — ELKJØP

As a leading consumer electronics retailer, Elkjøp's score is driven by strong operational fundamentals. With Stock Data & Fulfilment at 88% and UX at 81%, it excels in areas critical for high-consideration, inventory-driven purchases. On top of this, a high Loyalty score indicates that Elkjøp has prioritised capabilities supporting both conversion and retention.

3rd — 54% — Cubus

Cubus, a fashion retailer, earns its place through front-end strength rather than full-funnel depth. Purchase (83%) and Digital Marketing (75%) are standout scores, reflecting a strong ability to drive traffic and convert in a highly competitive, promotion-driven category. However, CRM, Loyalty, and AI trail significantly. This suggests a business that is well-optimised for acquisition and conversion, but has yet to build the retention and data infrastructure needed to create longer-term customer value.

Finland

AVG. SCORE: 36%

Finnish brands and retailers show a clear pattern: strong execution of proven omnichannel fundamentals, combined with a more cautious approach to newer and less established capabilities.

Purchase is the strongest phase at 48%, standing clearly above Evaluation (36%), Loyalty (36%), Awareness (35%) and Service (32%). Once customers are ready to buy, the experience works well. The challenge is everything that happens before and, to some extent, after.

Finnish brands are strong on the transactional mechanics that capture value at the point of purchase. 81% show personalised up- and cross-selling on product pages, 71% offer monetary loyalty benefits, and 74% nudge customers to join a newsletter or loyalty programme at checkout. Availability and fulfilment are also well covered. A majority show local stock and support click & collect, making it easy for customers to act on intent. But these strengths are concentrated at the final step of the journey, optimised to convert demand, rather than build it.

Earlier in the journey, the experience is thinner. Evaluation at 36% reflects a clear gap in decision support. Only 7% use behaviour-based search, 14% support natural language understanding, and just 2% offer visual search. AI-driven guidance is still early, with around 10% using assistants to support customers. As discovery becomes more dynamic and conversational, this is a growing challenge.

On product pages, the same pattern holds. Only 2% use user-generated content, and richer formats are rarely used to bring products to life. In-store, core services are in place, but the experience rarely goes further. Only a small share offer self-service endless aisle or mobile POS, limiting flexibility and continuity across channels.

There are also missed opportunities in demand creation. Few brands manage to grow brand searches significantly, and formats like live shopping or more engaging content are still underutilised. Visibility is there, but it does not always translate into stronger demand.

To get ahead, Finnish brands and retailers need to shift focus from capturing demand to shaping it – strengthening discovery, improving decision support, and investing in more assistive, content-rich and AI-driven experiences.

HIGHLIGHTS

83%
offer monetary loyalty benefits.

81%
show at least two personalised up- and cross-selling opportunities on PDP.

74%
nudge customers towards newsletter or loyalty sign-up at checkout.

ROOM FOR IMPROVEMENT

0%
grew brand searches by 10%+ in the last 12 months.

5%
send automated behaviour-based emails.

2%
show user-generated content on PDP.

TOP PERFORMERS

1st — 68%

VERKKO KAUPPA .COM

Verkkokauppa.com tops the Finnish market. What sets them apart is exceptional strength in Stock Data & Fulfilment (100%) – a critical advantage in a category driven by availability, speed, and price transparency. When customers can see what's in stock and get it quickly, friction drops. Verkkokauppa.com turns this operational strength into impact, driving both conversion and trust at scale.

2nd — 57%

IKEA

IKEA delivers a relatively even performance across disciplines, with one clear standout. Exceptional strength in Technical Performance & Master Data (100%) sets a strong foundation. However, lower results in Awareness, Video, and AI (20%) point to opportunities to strengthen how the brand engages and inspires earlier in the journey.

3rd — 54%

GIGANTTI

Gigantti's strength lies in delivering where it matters most in the moment of purchase. A high Purchase score (83%), supported by strong Customer Service & In-Store Support, reflects a business built to support confident, high-intent decisions. However, lower scores in Digital Marketing, Awareness, and AI point to gaps earlier in the journey.

The Netherlands

AVG. SCORE: 39%

Dutch brands and retailers stand out for their ability to generate demand and drive traffic. The Netherlands leads on Digital Marketing at 53%, and this is reflected in the customer journey, where Awareness reaches 49% – the highest across all markets.

That strength is visible in the touchpoints. 91% are active on newer and visual social platforms, and 87% nudge users towards newsletter or loyalty sign-ups at check-out. This creates a strong engine for both visibility and data capture early in the journey.

Purchase is also strong at 57%. Once customers are ready to buy, the experience works. 82% offer 'buy now, pay later' online, 84% support click & collect or delivery to store, and 75% offer monetary loyalty benefits. Availability is well communicated, with 64% showing local store stock on the product page.

Together, this creates a powerful combination: strong visibility at the top of the funnel, and effective performance at the point of transaction – but with clear gaps in what happens in between.

Evaluation score 32%, highlighting a gap in how customers are supported when making decisions. While traffic is strong, the tools that help customers compare, explore and choose are less developed. Only 12% use behaviour-based search, 7% support natural language understanding, and just 5% offer visual search. AI-driven guidance is still early, with only 12% using AI as a guided sales assistant.

The gap continues into the physical experience. While fulfilment is strong, stores are not fully activated as part of the journey. Only 16% offer self-service endless aisle, while mobile POS and assisted selling remain limited, restricting flexibility and continuity across channels.

The opportunity for Dutch brands and retailers is to strengthen the middle and final parts of the journey: improving evaluation through better guidance, richer product experiences and smarter search, while activating stores as a more integrated and assistive part of the experience.

HIGHLIGHTS

91%
are active on social media (20+ posts in the last month).

63%
increased organic traffic in the last 12 months.

87%
recruit to newsletter at checkout.

ROOM FOR IMPROVEMENT

0%
use Mobile POS – allowing staff to complete purchases anywhere in-store.

7%
understand natural language rather than exact keywords.

1%
reach a Google PageSpeed score of 90/100 from desktop.

TOP PERFORMERS

1st — 61%

IKEA

IKEA leads the Dutch market with a well-rounded performance. Strong execution across areas like UX, Sustainability, and Customer Service reflects a business that delivers consistently across both digital and physical touchpoints. Compared to other markets, however, there are clearer gaps in areas like Digital Marketing, Stock Data, and Video – highlighting that while overall performance is strong, not all disciplines are equally prioritised at a local level.

2nd — 59%

DECATHLON

Adidas and Decathlon reach the same position, but with very different profiles. Adidas shows clear spikes, particularly in Video, alongside strong CRM & Customer Data and Loyalty, pointing to a brand-led experience built on content and engagement. At the same time, a complete lack of AI highlights a gap in more advanced, scalable personalisation. Decathlon is more balanced across the board, with fewer sharp peaks but consistently solid scores. Strength in Purchase, Digital Marketing, and Stock Data & Fulfilment reflects a commercially focused setup that supports customers effectively through the buying journey.

3rd — 54%

Foot Locker

Foot Locker, as a global sportswear retailer in a trend-driven and highly competitive category, presents a performance profile focused on getting the core journey right. Strong execution in Stock Data & Fulfilment and Technical Performance, alongside solid Digital Marketing and Video, supports efficient conversion. However, with lower scores in Sustainability and AI, the overall maturity beyond these fundamentals is more limited, pointing to a business prioritising immediate commercial impact over broader capability building.

Belgium

AVG. SCORE: 40%

Belgian brands have invested heavily in making the final step easy. When customers are ready to buy, everything works. Smoothly, predictably, and with very little friction. That shows up clearly in the data with the Purchase phase scoring at 65% – the highest across all markets.

Looking at the specific touchpoints, 75% show local availability directly on the product page, 85% offer click & collect or delivery to store at check-out, and 85% support in-store returns. Add to that 80% offering buy now, pay later, and it becomes clear: once intent is there, customers can act on it immediately and flexibly.

Belgian brands are equally strong at squeezing value out of that moment. 75% use up- and cross-selling in online basket and 63% nudge to newsletter and/or customer club sign-up during check-out. The commercial engine is well tuned. But step back in the journey, and the picture changes.

Evaluation is the weakest phase at 33%. In other words, customers are well served when they know what they want, but less supported when they are still figuring it out.

The data makes that gap tangible. Only 8% use behaviour-based search, 3% understand natural language rather than exact keywords, and just 5% offer visual search. AI-driven guidance is still early, with around 9% using assistants to support customers.

On product pages, the same pattern holds. Only 5% use user-generated content, and while 60% show reviews on product level, richer formats that help customers understand and compare products are limited.

There are also missed opportunities in how demand is built. 90% are active on social platforms, but only 15% manage to grow brand searches significantly. Visibility is there, but it does not always translate into stronger intent.

The opportunity for Belgian brands and retailers is clear: move upstream. Invest in better discovery, stronger product storytelling, and more assistive, AI-driven experiences that help customers choose, not just buy.

HIGHLIGHTS

85%
offer click & collect and support in-store returns.

80%
offer 'buy now, pay later' online.

63%
show at least two personalised up- and cross-sell opportunities on PDP.

ROOM FOR IMPROVEMENT

8%
use behaviour-based search.

5%
show user-generated content on PDPs.

3%
use Mobile POS – allowing staff to complete purchases anywhere in-store.

TOP PERFORMERS

1st – 66%

IKEA

IKEA Belgium takes a different route to strong performance than IKEAs in other markets, leaning less on front-end visibility and more on deeper capabilities. With a standout AI score (100%) and strong performance in sustainability and customer service, the focus is clearly on building a more future-ready and operationally solid setup. The trade-off is a less developed presence in areas like Digital Marketing and Video – showing that even within the same brand, markets make very different choices about where to invest.

2nd – 61%

DECATHLON

Decathlon takes second through operational solidity and cross-phase consistency. High scores in Sustainability (83%) and CRM reflect a business that understands both its product lifecycle and its customers. Combined with solid Stock Data, this creates a reliable and well-informed journey. The gap appears in areas like Video and AI, suggesting that while the fundamentals are strong, the next step is bringing more inspiration and innovation into the experience.

3rd – 51%

MANGO ZARA

Two fashion brands share third place, but with notably different profiles. Zara leans into operational strength, with strong scores in Customer Service and AI, pointing to a more capability-driven setup. Mango, on the other hand, stands out in customer engagement and conversion, with higher performance in CRM, Loyalty, and Purchase. Together, they highlight two distinct paths to similar outcomes – one focused on operational depth, the other on driving demand and customer connection.

Industries

The way customers shop is fundamentally different across product categories – and that difference is reflected in how brands prioritise and execute across the customer journey.

At the same time, expectations no longer sit within category boundaries. Customers don't just compare you to your closest competitors – they compare you to the best experience they've had anywhere.

That means the most valuable inspiration doesn't only come from your own industry, but from leading brands across sectors setting new standards for speed, simplicity, and personalisation.

In this section, we break down omnichannel performance across 11 industries, highlighting overall performance, key strengths, gaps, and the brands setting the pace. This shows what "good" looks like within each industry – and where there's more to learn.

Industry Performance Overview

ELECTRONICS	45%
JEWELLERY AND WATCHES	40%
SPORT AND LEISURE	40%
FOOTWEAR	38%
FASHION	38%
FURNITURE AND HOME INTERIOR	38%
BEAUTY AND PHARMA	36%
DEPARTMENT STORES	36%
KIDS	35%
HOUSE AND GARDEN	34%
PETS, GIFTS AND HOBBY	34%

Industries side by side

INDUSTRIES	AWARENESS	EVALUATION	PURCHASE	SERVICE	LOYALTY
Electronic	*43%*	*45%*	*67%*	*45%*	*39%*
Jewellery and Watches	*45%*	*34%*	*60%*	*33%*	*43%*
Footwear	*39%*	*34%*	*60%*	*42%*	*36%*
Fashion	*40%*	*32%*	*56%*	*37%*	*42%*
Sport and Leisure	*44%*	*36%*	*55%*	*36%*	*38%*
Furniture and Home Interior	*35%*	*40%*	*51%*	*38%*	*33%*
Beauty and Pharma	*38%*	*31%*	*54%*	*32%*	*40%*
Department Stores	*41%*	*31%*	*39%*	*31%*	*40%*
Kids	*33%*	*36%*	*50%*	*38%*	*30%*
Pets, Gifts and Hobby	*32%*	*32%*	*47%*	*27%*	*41%*

THE CONVERSION LEADERS

Purchase dominates across all industries, with Electronics pulling ahead at 67%. This reflects years of optimisation in checkout, fulfilment and UX. But it also signals a shift: conversion is no longer where brands win – it's where they're expected to perform. The competitive battleground has moved earlier in the journey.

THE CONSISTENT PERFORMERS

Several industries show balanced, mid-level performance across phases and disciplines. They don't break, but they don't stand out either. For customers, this means predictable but forgettable experiences. For brands, it highlights a clear opportunity to differentiate and stand out in an increasingly competitive market.

THE OPERATIONAL STRONGHOLDS

Categories such as Kids and House & Garden perform strongly in operational layers, with Stock, UX and Technical often reaching 50–57%. These industries are built for efficiency, helping customers complete tasks quickly. But they underperform when customers need guidance, inspiration or reassurance, limiting their ability to capture more complex or higher-value journeys.

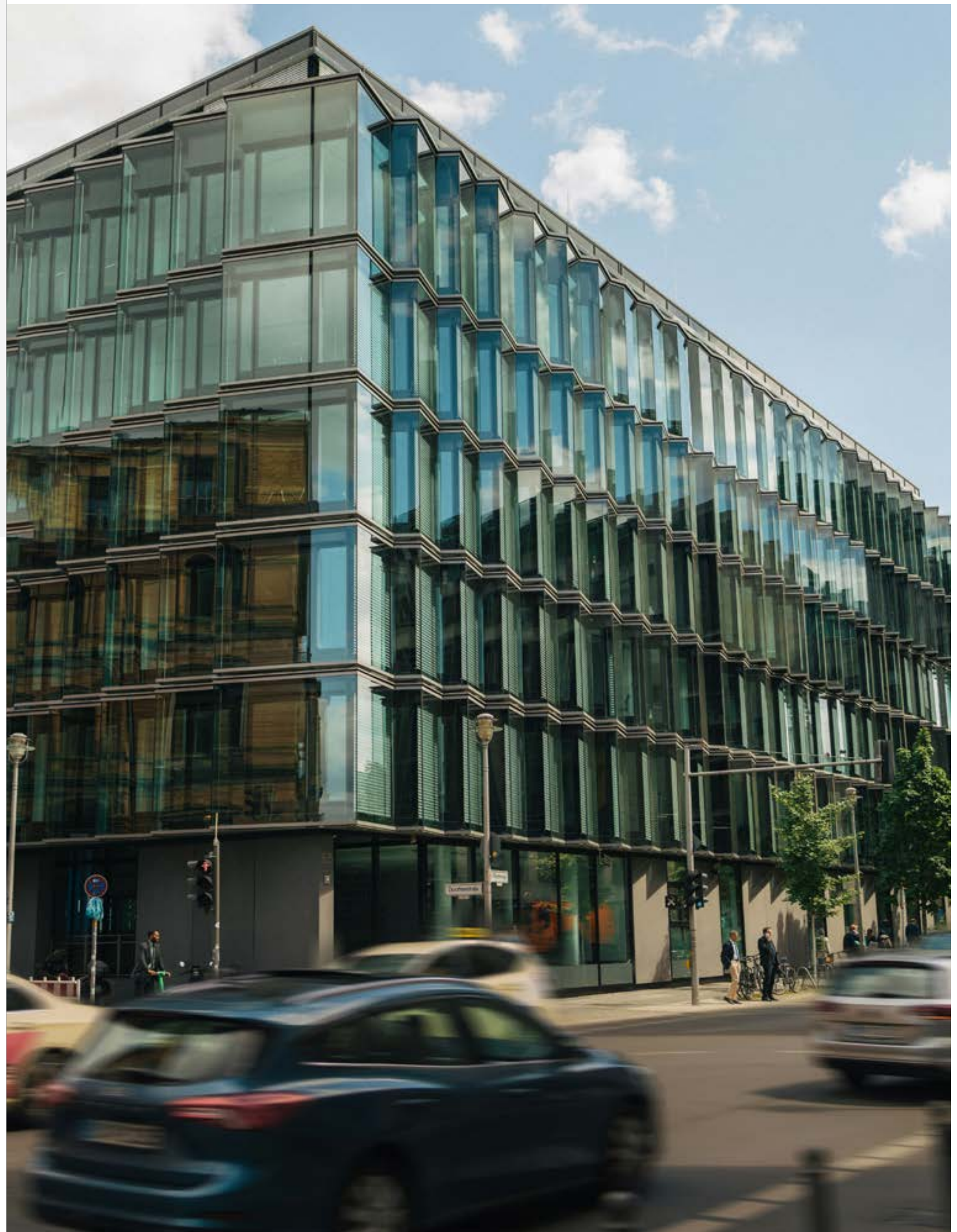
THE SHARED GAPS & OPPORTUNITIES

DECISION-MAKING IS THE BIGGEST MISSED OPPORTUNITY

Evaluation remains consistently low at an average of 35%, highlighting a critical gap at the moment customers need the most support. This is where hesitation happens – and where most industries underdeliver. In increasingly complex categories like electronics, beauty and home, this directly impacts conversion, basket size and returns. Strengthening comparison tools, guided journeys and product context is a clear opportunity to turn intent into confident decisions.

SERVICE IS THE WEAKEST LINK IN OMNICHANNEL

Customer Service sits between 23% and 37%, making it one of the lowest-performing disciplines. While brands have optimised acquisition and conversion, support remains underdeveloped – particularly outside store hours. This creates friction at key decision moments. Expanding service availability and integrating it more seamlessly across channels can reduce uncertainty and build trust, especially in high-consideration journeys.



PERSONALISATION IS UNDERDELIVERING ON ITS PROMISE

Despite CRM scores of 32–40%, AI adoption remains low at 12–24%. The gap is clear: data is being collected, but not meaningfully activated. As a result, customers still encounter largely generic experiences. Brands that move beyond data collection to real-time, relevant personalisation will be better positioned to drive engagement, loyalty and repeat purchase.

INSPIRATION ISN'T TRANSLATING INTO ACTION

Video and richer content formats sit at 22–33%, leaving significant untapped potential. While many brands invest in content, it is rarely integrated into the decision-making journey. Embedding inspiration directly into product discovery and evaluation – from homepage to PDP – can bridge the gap between browsing and buying, helping customers understand, compare and choose with confidence.

Electronics

AVG. SCORE: 45%

The Electronics industry leads the entire 2026 index with an average of 45%, outperforming every other industry.

This is an industry shaped by informed, research-heavy purchases, where customers compare, evaluate, and validate before committing.

That dynamic is clearly reflected in the data. Stock Data & Fulfilment leads at 60%, UX follows at 56%, and Purchase stands out at 67%. The operational and transactional layers are well developed, making it easy for customers to act once they're ready to buy.

The discipline profile is notably balanced compared to other industries. No single area dominates, and most disciplines sit within a relatively narrow band, which speaks to a broad baseline of omnichannel maturity that few other industries can match.

But that strength also hides a clear limitation. The experience is built to convert demand – not to grow or retain it. Loyalty sits at 39%, and CRM & Customer Data at 36%, indicating that customer relationships are rarely developed beyond the transaction.

In a category with high basket values, rapid innovation cycles, and strong repurchase potential, that is a missed opportunity.

AI is the most significant gap at 26%, and the touchpoint data reinforces it: 0% offer visual or image-based search, and just 11% support natural language understanding in site search.

For an industry where product complexity is high and customers actively seek guidance, the tools to support smarter discovery are largely still missing.

HIGHLIGHTS

96%

offer Buy Now, Pay Later and show local store availability on PDP.

93%

offer online purchasing with in-store returns.

89%

show customer reviews at product level and offer click & collect in checkout.

ROOM FOR IMPROVEMENT

0%

offer visual or image-based search – a significant gap for a category where product comparison and specification matter.

4%

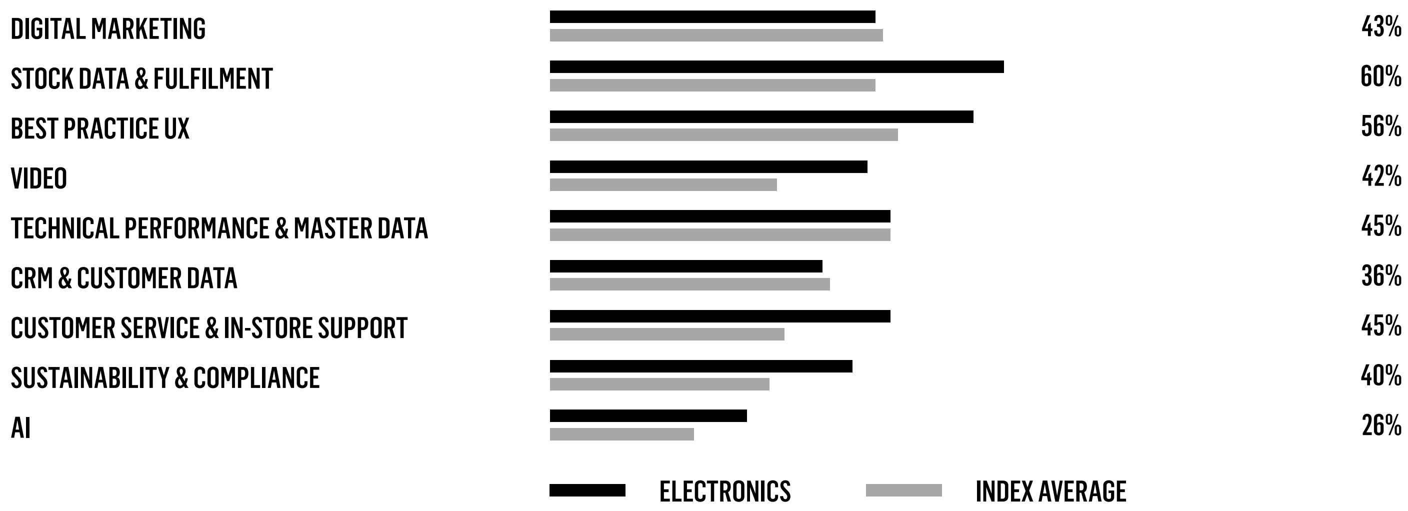
provide digital support outside opening hours, despite service being a critical factor in high-consideration electronics purchases.

14%

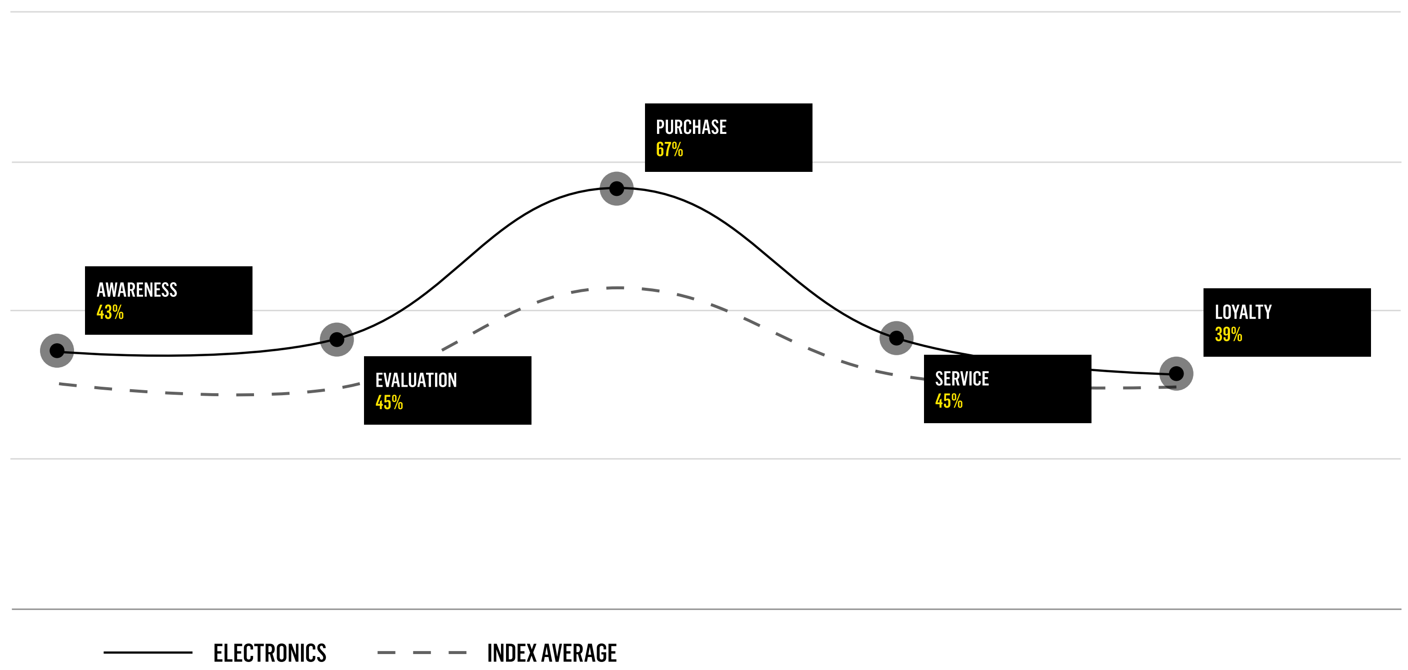
offer Mobile POS on the shop floor, limiting the ability to close sales in-store.

DISCIPLINE SCORES

The discipline profile reflects an industry that has invested in the transactional and operational layers of the customer journey – and significantly less in personalisation, retention and the emerging tools that will shape how customers discover and decide.



INDUSTRY SCORE BY PHASE



Electronics

TOP PERFORMERS

1st — 68%

Verkkokauppa.com

Verkkokauppa.com leads the Electronics industry with a profile that stands out on two fronts. A perfect 100% in Stock Data & Fulfilment sets the operational benchmark for the industry, and an AI score of 80% puts them well ahead of peers in a discipline where most are still catching up. Strong Service and Video scores add further depth – though at 68% overall, there is still meaningful room to grow across the journey.

2nd — 46%

HiFi Klubben

Hifi Klubben takes second place on the strength of its commercial experience – Purchase at 83% and solid UX scores point to a brand that converts well. But the profile drops sharply once the transaction is complete. Service at 36% and Sustainability at 17% are the clearest gaps, and suggest a brand that has prioritised the front end of the journey at the expense of what comes after.

3rd — 45%

Elkjøp, Kjell & Company

Elkjøp and Kjell & Company share third place but with markedly different strengths. Elkjøp's profile is built on operational excellence – Stock Data & Fulfilment at 88% and Purchase at 83% are among the strongest in the industry – but Technical Performance and AI at 20% reveal where investment hasn't followed. Kjell & Company is more rounded technically, with strong Sustainability, Evaluation and Technical Performance scores, but trails significantly on Digital Marketing and Awareness, pointing to a brand that performs well when customers arrive, but struggles to reach them in the first place.

4	NETONNET	54%
5	WEBHALLEN	51%
5	POWER	51%
6	FNAC	50%
7	COOLBLUE	49%
8	ELEKTROIMPORTØREN	46%
	AVERAGE	45%

WHAT LEADERS SHOULD PRIORITISE NEXT

01

IMPROVE PRODUCT DISCOVERY IN A COMPLEX CATEGORY.

With AI at 26%, 0% visual search adoption, and just 11% supporting natural language search, customers are left to navigate complexity on their own. Smarter search, comparison tools, and guided discovery can significantly reduce friction in the evaluation phase.

02

TURN ONE-OFF PURCHASES INTO ONGOING RELATIONSHIPS.

Loyalty at 39% and CRM at 36% show that most brands stop at the transaction. Connecting customer data across touchpoints enables more relevant follow-ups, personalised recommendations, and lifecycle communication that drives repeat purchases.

03

EXTEND STRONG OPERATIONS INTO THE FULL JOURNEY

Purchase performs at 67%, but the surrounding journey remains average. The next step is to activate existing capabilities such as fulfilment, store networks, and service into a more connected, consistent experience that supports customers before and after conversion.

Jewellery and Watches

AVG. SCORE: 40%

The Jewellery & Watches industry shares second place with Sport & Leisure with an industry average of 40%. Digital marketing is exceptional, social presence is consistent, and the industry leads every other in Awareness at 51%.

For a category built on aspiration, identity, and emotional appeal, that investment in visibility clearly pays off – brands are highly effective at creating desire and staying top of mind.

But the data tells two stories at once. Beneath the strong top-of-funnel performance lies a customer journey that drops sharply the moment a customer moves from discovery to decision.

Evaluation scores just 34% – a gap of nearly 11 percentage points from Awareness.

That gap is particularly critical in this category. Jewellery is rarely a low-consideration purchase – it carries emotional weight, higher price points, and often a need for reassurance.

Yet the tools that should enable confident decision-making, such as guided discovery, rich product storytelling, personalised assistance, remain underdeveloped. The experience doesn't match the stakes of the purchase.

The weakness is most visible in Customer Service, which scores just 21% – the lowest discipline score of any industry in the entire index. Whether online or in-store, access to knowledgeable, confidence-building support is limited.

Purchase holds up well at 60%, supported by strong fulfilment mechanics and solid technical performance. And Loyalty, at 43%, suggests that once brands do win a customer, they have the foundations to retain them. But the real challenge sits in the middle of the journey – bridging the gap between inspiration and decision.

HIGHLIGHTS

100%

nudge to newsletter and/or customer club sign-up during checkout.

100%

shows at least two personalised cross-selling opportunities on PDP.

92%

of brands offer 'Buy Now, Pay Later' online.

ROOM FOR IMPROVEMENT

0%

offer visual or image-based search – despite it being a natural fit for the category.

25%

enable staff to chat with customers in-store for product advice or place orders on their behalf.

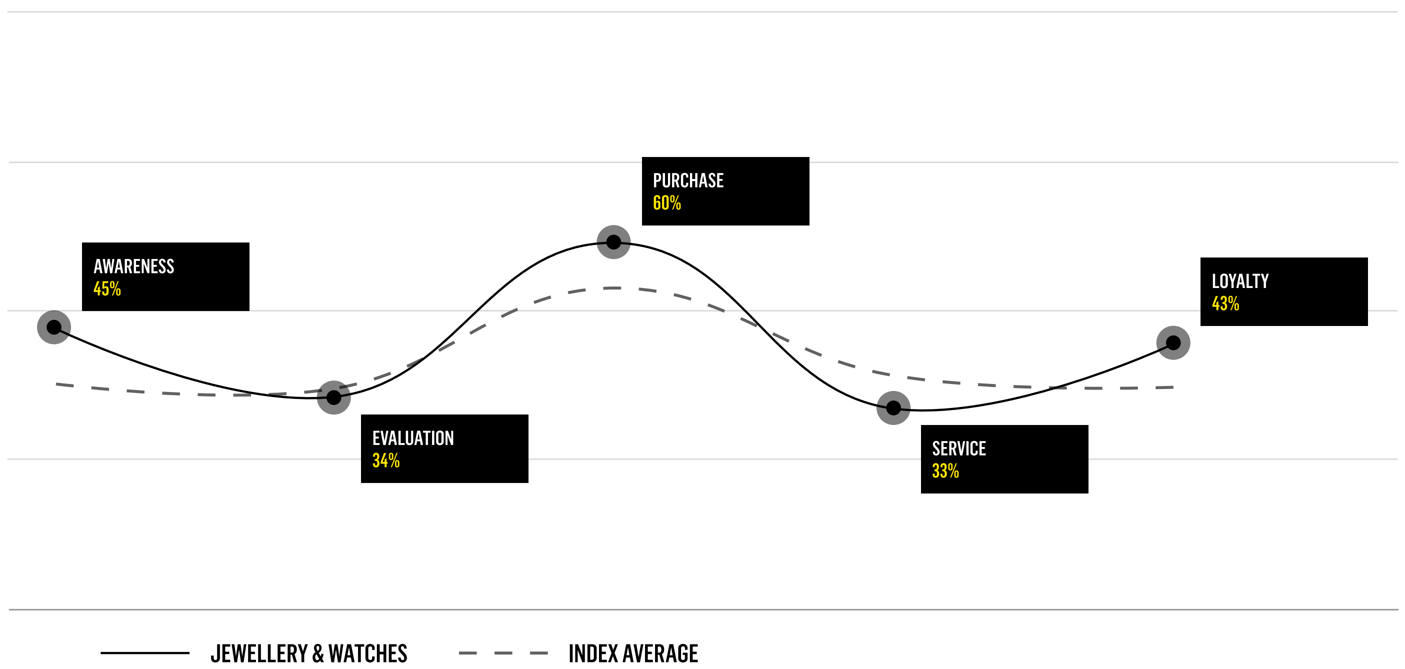
0%

provide digital support outside opening hours or offer Mobile POS on the shop floor.

DISCIPLINE SCORES

The discipline profile reflects a business that has invested heavily in brand and digital execution, and significantly less in the personalised, service-led experience that customers in this industry expect.

INDUSTRY SCORE BY PHASE



Jewellery and Watches

TOP PERFORMERS

1st — 51%

GULLFUNN

Gullfunn leads the Jewellery & Watches industry with a 51% overall score. The Norwegian jeweller outperforms the industry on technical performance and purchase experience – and in a category where customer service is almost universally underdeveloped, they're one of the few who actually show up for the customer.

2nd — 46%

PANDORA SWAROVSKI

Pandora and Swarovski share the joint second spot, but arrive there by different routes. Pandora's strength is operational – Purchase and Stock Data & Fulfilment both well above industry level, with reliable digital marketing execution to match. Swarovski leads on brand and content, with a Video score of 89% that stands out across the entire industry, backed by strong Loyalty and Digital Marketing performance. Two brands, same score, very different playbooks.

3rd — 45%

LUCARDI

Lucardi secures third place with a 45% overall score, driven by strong purchase and loyalty performance. The brand stands out for its ability to convert intent into action, supported by solid fulfilment and a consistent post-purchase experience. While earlier journey stages lag behind, Lucardi's balanced execution and investment in UX, AI, and customer data position it well to strengthen the path from inspiration to decision.

4	BJØRKLUND	43%
5	UR & PENN	41%
6	PILGRIM	38%
7	TIMANTTISET	35%
8	KULTAJOUSI	26%
9	LAATUKORU	24%
	AVERAGE	40%

WHAT LEADERS SHOULD PRIORITISE NEXT

01

STRENGTHEN DECISION SUPPORT WHERE CUSTOMERS HESITATE.

The 11-point drop from 45% in Awareness to 34% in Evaluation shows that customers aren't getting the help they need to decide. In a high-consideration category, guided selling, stronger product storytelling, and relevant recommendations can make that decision feel clearer and more confident.

02

MAKE SERVICE PART OF THE BUYING EXPERIENCE.

With Customer Service at just 21% – the lowest score across all industries – there is a clear gap in how brands support customers. Access to real expertise, whether through chat, clienteling, or in-store tools, is key to building trust and ensuring conversion.

03

CONNECT THE JOURNEY ACROSS TOUCHPOINTS.

While Purchase performs strongly at 60%, the journey leading up to it remains fragmented. Connecting data and systems across channels ensures each interaction builds on the last, creating a more seamless experience that drives both conversion and Loyalty (currently at 43%).

Sport & Leisure

AVG. SCORE: 40%

The Sport & Leisure industry takes second place with an overall score of 40%. It's a category shaped by purpose and performance. Customers don't just browse – they look for products that match a specific need, activity, or level of expertise. That makes guidance, comparison, and confidence central to the buying decision.

The industry delivers well on the fundamentals. Technical Performance (47%), UX (47%) and Stock Data & Fulfilment (39%) provide a solid operational backbone, making the path to purchase efficient and reliable. This is reflected in a strong Purchase score of 55%.

Sport & leisure brands and retailers are highly visible, with 95% of brands active on platforms like TikTok and Pinterest – yet Awareness reaches 44%, suggesting that visibility doesn't always translate into meaningful demand.

That gap becomes more apparent once customers move beyond inspiration. Evaluation scores just 36%, highlighting a lack of support when customers need to compare, understand, and choose between increasingly complex products. While 67% offer personalised up- and cross-selling on PDPs, discovery remains limited, with only 11% supporting natural language search and just 14% using AI assistants to guide the journey.

The same pattern continues after the purchase. While 82% of brands push loyalty sign-ups at checkout and 82% offer monetary benefits, overall Loyalty reaches just 36%. With only 18% activating customers through behavioural triggers and 24% offering emotional benefits, engagement remains largely transactional rather than relationship-driven.

Service reinforces this imbalance. Despite strong mobile performance (88%), only a small share of brands extend support into the moments where customers actually need it, leaving gaps in accessibility in a category where advice often matters.

HIGHLIGHTS

95%
are active on visual and emerging social platforms like tiktok and pinterest, reflecting strong top-of-funnel presence.

86%
deliver fast mobile site performance, supporting browsing and on-the-go shopping.

67%
show at least two personalised up- and cross-selling options on PDP.

ROOM FOR IMPROVEMENT

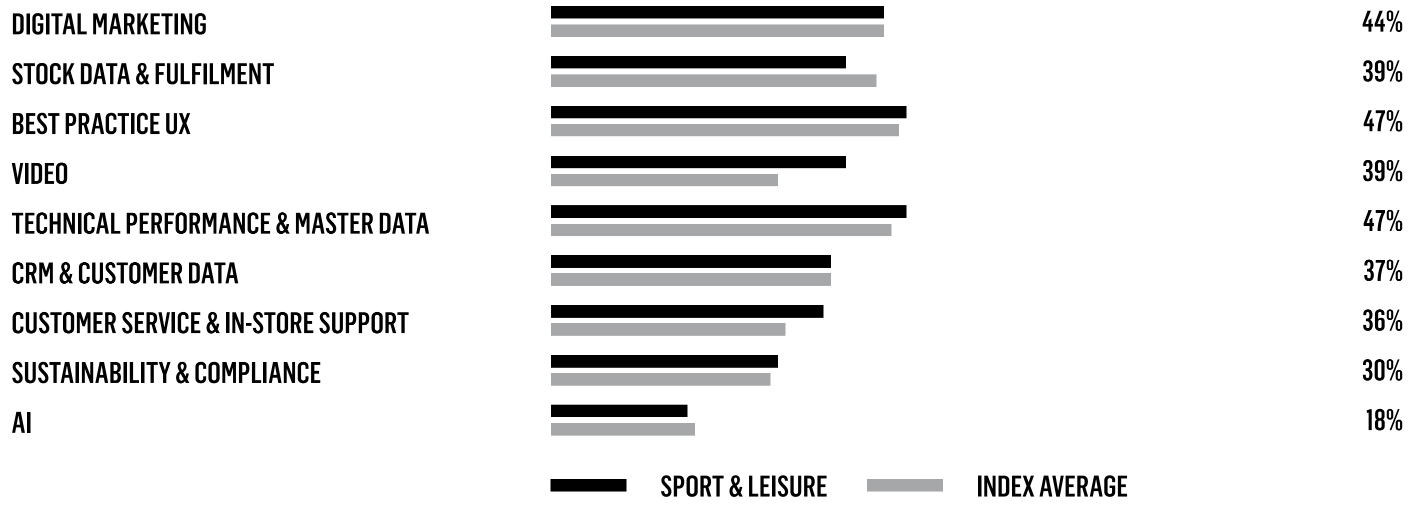
14%
use AI assistants to support customers in their journey.

11%
understand natural language rather than exact keywords in search.

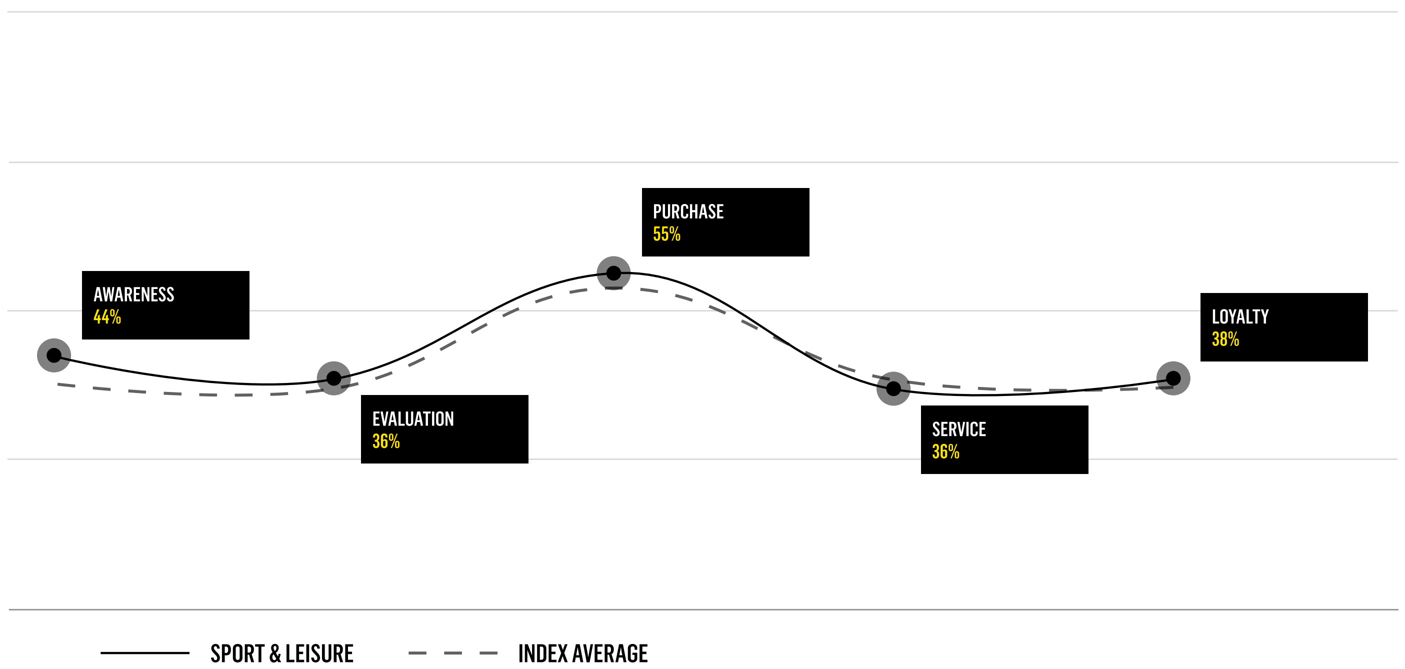
5%
show user-generated content on PDP, limiting social proof in a category driven by trust and performance.

DISCIPLINE SCORES

The discipline profile reflects an industry with strong technical and operational foundations – but one that still underinvests in the capabilities that help customers choose, engage and return.



INDUSTRY SCORE BY PHASE



Sport & Leisure

TOP PERFORMERS

1st	Decathlon	61%
2nd	Adidas	59%
3rd	Sport24	55%

Decathlon leads the Sport & Leisure category with one of the most complete profiles in the industry. The brand stands out for its strength in CRM & Customer Data and Loyalty, backed by solid performance across UX and Evaluation. It's a clear example of a retailer that doesn't just convert demand, but actively builds customer relationships – even if areas like AI still show room to grow.

Adidas takes second on the strength of its brand and customer engagement. Video, CRM and Loyalty are all well above industry level – reflecting a brand that knows how to capture attention and keep customers close. The gaps are on the operational side, where Stock & Fulfilment and a severe underperformance in AI capability suggest the digital infrastructure hasn't quite kept pace with the brand experience.

Sport24 takes third place, driven by a strong operational and service-led approach. Purchase and Customer Service & In-store Support are among the strongest in the category, pointing to a brand that executes well at the point of transaction. But weaker performance in CRM and Sustainability suggests the experience drops off once the purchase is complete.

4	NORRØNA	53%
5	NATURKOMPANIET	50%
6	PARTIOAITTA	46%
6	XXL SPORT	46%
7	PEAK PERFORMANCE	45%
7	NIKE	45%
8	A.S.ADVENTURE	42%
	AVERAGE	39%

WHAT LEADERS SHOULD PRIORITISE NEXT

01

CLOSE THE GAP BETWEEN INSPIRATION AND INFORMED CHOICE.

With Awareness at 44% but Evaluation dropping to 36%, the category struggles to support customers once interest is created. In a performance-driven space, customers need help understanding fit, use case, and product differences. Stronger comparison tools, expert content, and guided journeys can turn interest into confident decisions.

02

MAKE SERVICE A CONSISTENT PART OF THE EXPERIENCE.

Service sits at 36%, and only 6% of brands offer support outside opening hours. For products that often require advice, this creates clear friction. Expanding access to expertise – across digital channels and beyond store hours – will improve both conversion and customer confidence.

03

USE DATA TO BUILD RELATIONSHIPS BEYOND THE TRANSACTION.

While 82% push sign-ups at checkout and 82% offer monetary benefits, only 18% activate customers through behavioural triggers and just 24% offer emotional benefits. The opportunity is to use customer data to create more relevant, ongoing engagement, turning members into active, returning customers.

Footwear

AVG. SCORE: 38%

The footwear industry ranks among the top performers in the 2026 index, taking third place with an overall score of 38%.

At its core, this is a category optimised for conversion. Footwear purchases are often intent-driven – customers arrive with a clear need, whether it's size, style, or brand.

That dynamic is reflected in the data. UX (49%) and Technical Performance (47%) lead the discipline scores, while Purchase stands at 60%, supported by widespread fulfilment capabilities like click & collect and in-store returns (90%). But that strength reveals a clear bias.

The footwear brands and retailers perform best when demand already exists. The buying journey is well-optimised, but the stages that create and shape demand are less developed. Awareness (39%) and Evaluation (34%) both lag behind, despite strong social presence, with 95% of brands active on emerging, visual platforms like TikTok and Pinterest.

That gap becomes more apparent in how products are discovered. 0% offer visual or image-based search, and only 10% support personalised or optimised on-site search. In a category where style, fit and comparison are central, discovery remains largely manual.

Loyalty at 36% reflects a model driven more by incentives than engagement. While 91% offer monetary benefits and 73% push sign-ups at checkout, only 27% activate customers through behavioural emails and just 23% offer emotional benefits. The focus is on acquisition, not long-term relationship building.

AI, at 23%, sits above the index average, but remains low in absolute terms. And with 0% adoption of capabilities like image-based search, its impact on real customer experiences is still minimal.

HIGHLIGHTS

95%

are active on visual and emerging social platforms like TikTok and Pinterest, showing strong top-of-funnel presence in a trend-driven category.

90%

support flexible fulfilment options such as click & collect and in-store returns, making it easy for customers to move between channels.

86%

offer wishlist functionality, reinforcing consideration and enabling repeat visits in a browsing-heavy category.

ROOM FOR IMPROVEMENT

0%

offer visual or image-based search, limiting product discovery in a category where style and inspiration are key.

10%

support personalised or optimised on-site search – and just 10% understand natural language – making it harder for customers to find the right products quickly.

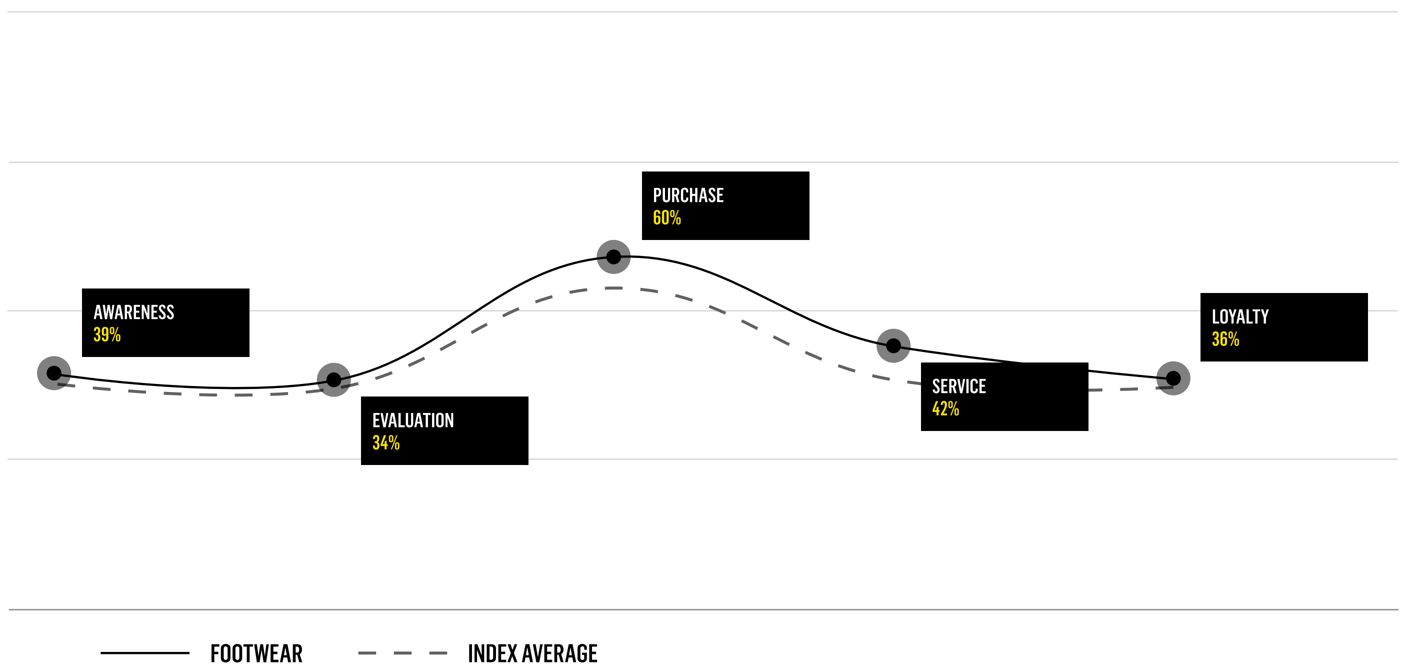
0%

support Mobile POS in-store, restricting the ability to seamlessly connect physical and digital experiences at the point of purchase.

DISCIPLINE SCORES

The discipline profile reflects an industry that has prioritised conversion and front-end experience – but is still underinvesting in discovery, service and the capabilities that drive long-term customer value.

INDUSTRY SCORE BY PHASE



Footwear

TOP PERFORMERS

1st	Foot Locker	54%
2nd	asics	49%
3rd	chaussea / shoeby	46%

Foot Locker leads the Footwear category with a strong and well-balanced profile. High scores in Stock Data & Fulfilment and Technical Performance underpin a seamless buying experience, while CRM and Customer Service add further depth, though there is still room to grow in areas like AI.

Asics takes second place on the strength of its customer relationships – CRM & Customer Data and Loyalty to a brand that retains well. But the profile drops sharply in operational areas. Low scores in Stock Data & Fulfilment and Customer Service highlight clear gaps, suggesting a brand that connects well with customers, but struggles to support them consistently.

Chaussea and Shoeby share third place but with different strengths. Chaussea performs strongly in the commercial layer – Purchase at 83% and solid Digital Marketing – but lacks depth across CRM and Service. Shoeby is stronger in CRM and Loyalty, but lower Technical Performance and Sustainability point to gaps in the operational and long-term experience.

4	SKORINGEN	45%
5	VANHAREN	43%
6	SCORETT	42%
7	TORFS	41%
7	NEW BALANCE	41%
8	COURIR	39%
	AVERAGE	38%

WHAT LEADERS SHOULD PRIORITISE NEXT

01
IMPROVE DISCOVERY IN A STYLE- AND FIT-DRIVEN CATEGORY.

Footwear customers often start with inspiration but need help narrowing down options by style, size, and fit. With Evaluation at 35%, that support is largely missing. Visual discovery, fit guidance, and smarter search can make product selection faster and more confident.

02
TURN ONE-TIME BUYERS INTO REPEAT CUSTOMERS.

Footwear a natural fit for repeat purchases – across seasons, use cases, and trends. Yet with Loyalty at 38%, and only 27% using behavioural triggers, most brands rely on discounts rather than relevance. Using CRM data to personalise recommendations and timing can drive more frequent and higher-value repeat purchases.

03
CONNECT INSPIRATION WITH CONVERSION.

Footwear brands are strong at creating inspiration, especially on social. The next step is making that inspiration actionable, ensuring customers can move seamlessly from seeing a product to finding, evaluating, and buying it without friction.

Fashion

AVG. SCORE: 38%

Fashion ranks fourth in the 2026 index with an average score of 38% – and the data tells a story of an industry that knows how to build relationships, but hasn't yet connected all the dots.

At the top of the funnel, fashion brands and retailers are in their elements. 93% of are active on visually driven platforms like TikTok and Pinterest, 88% maintain a consistent publishing cadence.

There's also clear maturity in commercial tactics. 83% of brands apply upsell and cross-sell in the basket, 81% personalise recommendations on product pages, and 76% enable basket continuity across devices. Loyalty plays a central role too, with 86% offering monetary incentives and over 81% prompting sign-ups at checkout. Fashion brands know how to drive intent – and increasingly, how to convert it.

But the experience is far less consistent beyond these moments.

Discovery and product experience remain surprisingly underdeveloped for such a visual category. While 86% use diverse image formats, only 8% include video on product pages, and just 2% offer image-based search.

Even user-generated content on PDPs – a powerful trust driver in fashion – is used by only 5%. The result is a gap between the rich inspiration customers see on social and the relatively flat experience they encounter when evaluating products.

Looking ahead, the biggest gaps sit in innovation and differentiation. Only 11% use video live shopping, 11% use behaviour-based search, and just 14% leverage AI as a sales assistant. Sustainability features are also still emerging, with only 22% highlighting climate-friendly shipping options and 13% offering resale or refurbished products.

HIGHLIGHTS

93%
are active on new and visual social media platforms, including Pinterest and TikTok.

86%
offer monetary benefits for loyalty club members.

76%
store the customer's basket across devices.

ROOM FOR IMPROVEMENT

11%
show video on PDPs, a missed opportunity in an industry where product presentation is everything.

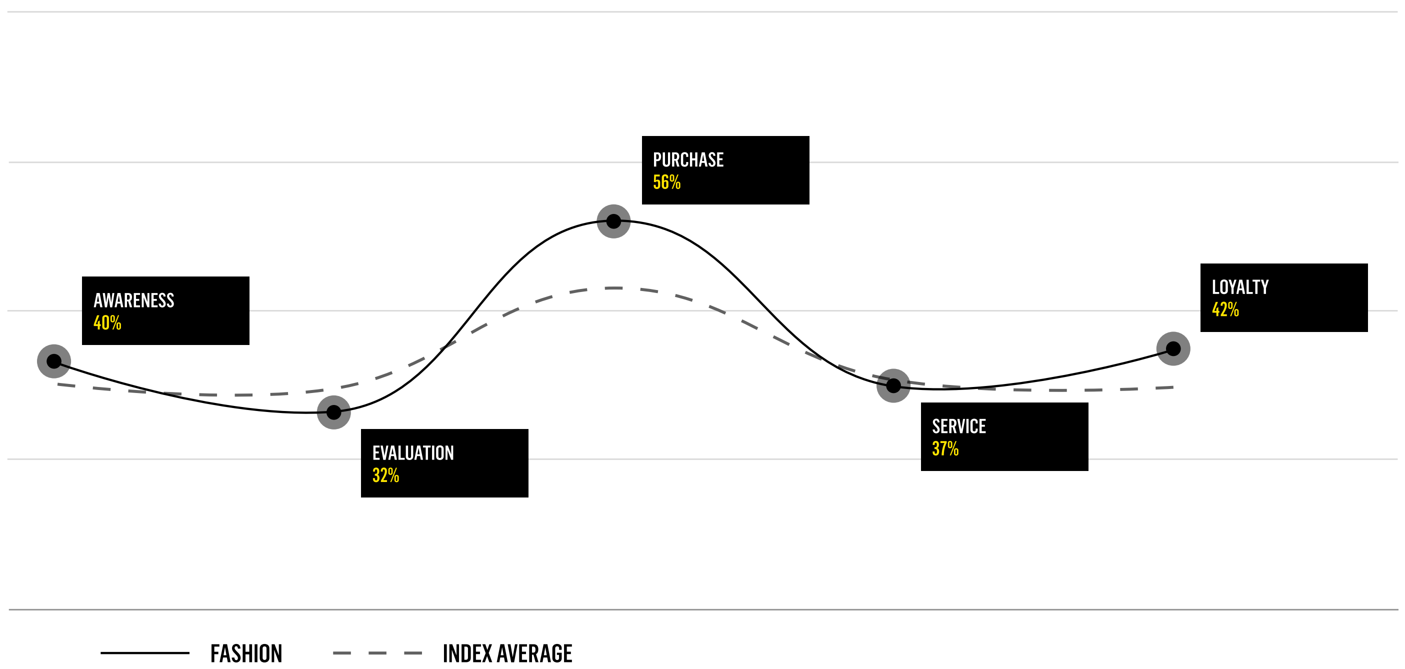
2%
offer Mobile POS on the shop floor, limiting the ability to serve customers and close sales in-store.

2%
offer image-based search – a significant gap for a visual category where customers increasingly discover products through images.

DISCIPLINE SCORES

The discipline profile reflects an industry that has invested in brand, loyalty and the moment of purchase – and significantly less in the content, service and operational infrastructure needed to support the full journey.

INDUSTRY SCORE BY PHASE



Fashion

TOP PERFORMERS

1st — 54%

Cubus · Kappahl

Cubus and Kappahl share second place but arrive there differently. Cubus executes well once a customer is in the funnel – strong Purchase and Stock & Fulfilment scores – but a lower Awareness score at suggests the top of the funnel needs attention. Kappahl's standout is Sustainability at 100%, the highest in the industry, backed by strong Loyalty and CRM that point to a brand investing in long-term customer relationships. The gap is in Purchase and Technical Performance, where the transactional experience hasn't quite kept pace.

2nd — 51%

LINDEX · MANGO · ZARA

Three brands, three distinct approaches. Mango's profile is led by strong Purchase and Video performance – a brand that invests in content and converts well – but Evaluation and Technical Performance reveal where the experience breaks down between inspiration and intent. Zara brings strong brand-facing scores across Video and Awareness, but Stock & Fulfilment and CRM lag significantly behind, pointing to a brand where digital infrastructure hasn't kept pace with its commercial presence. Lindex is the most technically rounded of the three – solid across Digital Marketing, Sustainability, CRM and Technical Performance, with a notably strong AI score – but a low score in Purchase at and Customer Service suggest the experience loses momentum closer to conversion.

3rd — 50%

H&M

H&M takes third place with a 50% overall score, driven by strong Digital Marketing and CRM & Customer Data. The brand excels at reaching and engaging customers at scale, reflected in a Loyalty score of 70% – one of the highest in the category. However, lower scores in Evaluation and Service highlight weaker support around decision-making and post-purchase. The result is a brand that leads on reach and retention, but has room to strengthen the experience in between.

4	CARLINGS	49%
4	DRESSMANN	49%
5	MARIMEKKO	47%
6	C&A	46%
	AVERAGE	38%

WHAT LEADERS SHOULD PRIORITISE NEXT

01

IMPROVE PRODUCT DISCOVERY IN A HIGH-CHOICE CATEGORY.

With Evaluation at 32% and only 1% offering image-based search, customers lack the tools to navigate large assortments. Stronger filtering, visual search, and richer PDP content can help customers find and choose products with confidence.

02

REDUCE DEPENDENCY ON INCENTIVE-DRIVEN LOYALTY.

Loyalty at 42% is strong, compared to the index average, but often driven by discounts and membership benefits. Activating CRM data to deliver more relevant, personalised experiences can turn repeat purchases into stronger, longer-term relationships.

03

STRENGTHEN THE OPERATIONAL BACKBONE BEHIND THE EXPERIENCE.

Stock Data & Fulfilment at 33% and limited in-store capabilities highlight gaps in execution. Improving inventory visibility, fulfilment options, and store-enabled services will create a more reliable and connected journey.

Furniture & Home Interior

AVG. SCORE: 38%

Furniture & Home Interior sits in the middle of the index with a score of 38%, reflecting an industry with solid foundations but an experience that doesn't fully support how customers actually shop.

This is a category defined by inspiration, consideration and long buying journeys. Customers rarely arrive ready to buy – they explore, compare, and visualise before committing. That makes content, reassurance, and guidance critical throughout the journey.

The fundamentals are in place. Technical Performance (47%), Digital Marketing (46%) and UX (46%) create a reliable and accessible experience, supported by Stock Data & Fulfilment (46%). But the experience is built more for completing purchases than enabling decisions. This is reflected in a Purchase score of 51%, with capabilities like local store availability and in-store returns helping reduce friction at the point of conversion.

Meanwhile, the tools that build confidence are limited. Only 12% show user-generated content on PDPs, leaving customers without real-life context, while just 18% use AI or guided selling to support decision-making. In a category where customers need to visualise and validate choices, this creates unnecessary hesitation.

The gap continues beyond the transaction. Loyalty (33%) and Service (38%) remain underdeveloped, with limited support and engagement once the purchase is complete. While 69% offer monetary benefits and 77% push sign-ups at checkout, far fewer invest in ongoing engagement – only 17% trigger behavioural emails and 25% offer emotional benefits.

At the same time, just 6% provide digital support outside opening hours and just 18% use AI assistants, leaving customers without guidance in a category where questions often arise after the initial visit.

HIGHLIGHTS

78%

show local store availability on PDP, helping customers understand accessibility and plan their purchase.

74%

show personalised up- and cross-selling on PDP, supporting exploration of complementary products and room-based shopping.

68%

offer online purchasing with in-store returns, reducing risk in a high-consideration category.

ROOM FOR IMPROVEMENT

12%

show user-generated content on PDP, limiting inspiration and real-life context in a visually driven category.

18%

use AI as a guided sales assistant or enable live shopping, leaving customers without support in complex purchase decisions.

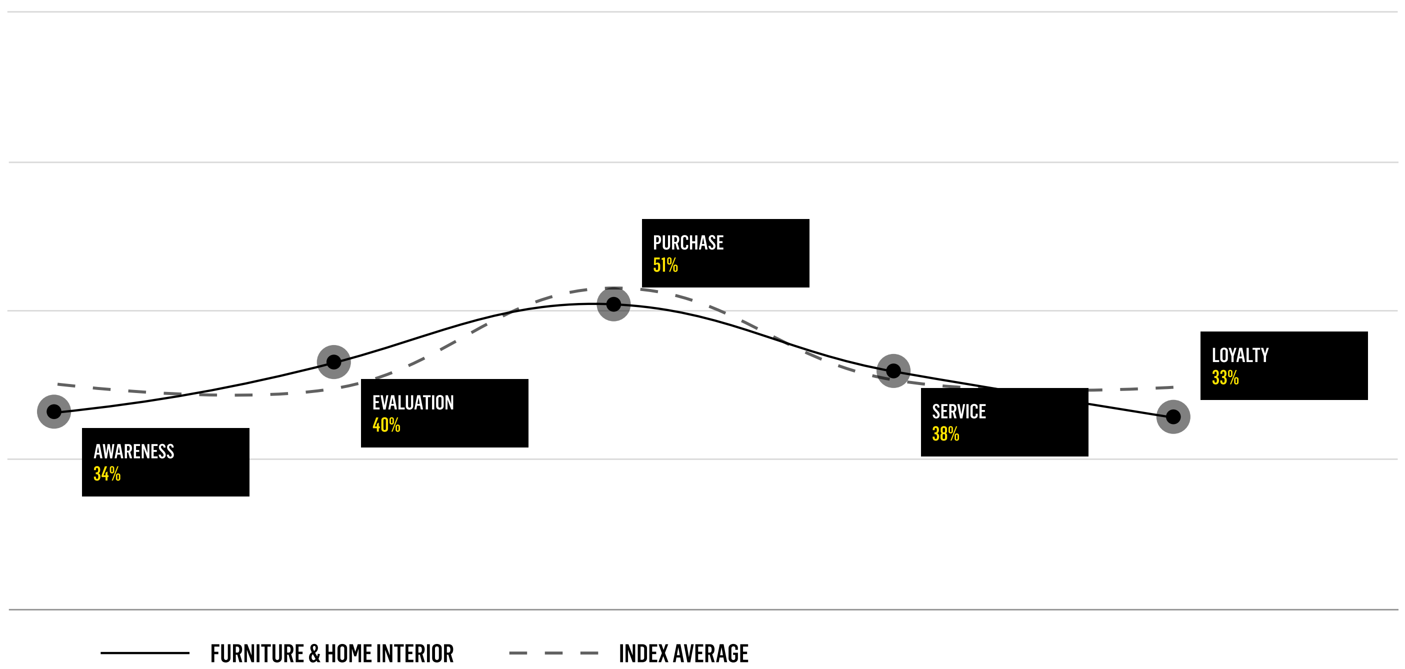
6%

provide digital support outside opening hours, creating gaps in service when customers are researching and planning.

DISCIPLINE SCORES

The discipline profile reflects an industry with strong operational and commercial foundations – but one that still underinvests in inspiration, service and the capabilities that drive long-term engagement.

INDUSTRY SCORE BY PHASE



Furniture & Home Interior

TOP PERFORMERS

1st	72%	IKEA
2nd	51%	Kop & Kande, TILBORDS
3rd	50%	IMERCO

IKEA leads the Furniture & Home Interior category – and overall Index - with a 72% score. The furniture retailer stands out across both operational and forward-looking disciplines – from Purchase and Customer Service to AI and Sustainability. In a category where many brands still struggle to balance inspiration, service and execution, IKEA shows what a more complete omnichannel model looks like.

Kop & Kande (DK) and Tilbords (NO) share second place, each with distinct strengths. Kop & Kande is driven by strong operational fundamentals, with standout Stock Data & Fulfilment and solid UX. However, weaker performance in Customer Service & In-Store Support points to gaps in key support moments. Tilbords shows a more customer-focused profile, with high scores in Purchase and Customer Service & In-Store Support. At the same time, lower results in Awareness and Technical Performance highlight opportunities to strengthen the overall experience.

Imerco (DK) takes third place with a strong commercial profile, with standout performance in Purchase and solid results in Digital Marketing and Stock Data & Fulfilment. This indicates an effective setup for driving traffic and conversion. However, weaker scores in Customer Service & In-Store Support, AI, and Evaluation highlight gaps in both advanced capabilities, suggesting opportunities to strengthen the overall experience.

4	ILVA	47%
4	CERVERA	47%
5	KITCH'N	45%
5	LAGERHAUS	45%
5	HEMTEX	45%
6	SØSTRENE GRENE	43%
	AVERAGE	37%

WHAT LEADERS SHOULD PRIORITISE NEXT

01

BRING PRODUCTS TO LIFE WITH REAL-WORLD CONTEXT.

With only 12% using user-generated content, customers lack the inspiration and reassurance needed to visualise products in their own space. Richer imagery, real-life content, and contextual storytelling can make decisions feel more tangible and less risky.

02

INTRODUCE GUIDED SUPPORT FOR COMPLEX DECISIONS.

Just 18% of brands use AI or guided selling tools, leaving customers to navigate high-consideration purchases alone. Providing support, through recommendations, advice, or interactive tools, can reduce hesitation and increase confidence at key moments.

03

STRENGTHEN ENGAGEMENT BEYOND THE PURCHASE.

With Loyalty at 33% and limited service availability, the relationship often ends at checkout. Using customer data to inspire, guide, and reconnect across projects, rooms, or life moments can turn one-off purchases into longer-term engagement.

Beauty & Pharmacy

AVG. SCORE: 36%

Beauty & Pharmacy is a category built on trust, guidance, and repeat purchase, but the experience remains heavily skewed towards short-term conversion rather than long-term customer value.

Customers in this category rarely make decisions instantly. Whether it's skincare, supplements, or personal care, choices depend on individual needs, product knowledge, and confidence in the outcome. That makes education, personalisation, and reassurance critical throughout the journey.

The industry performs best at the point of transaction. Purchase stands at 54%, supported by strong operational execution – from click & collect (83%) to seamless basket continuity across devices (80%). Brands are effective at converting demand once intent is there.

But the journey leading up to that moment is far less developed. Evaluation drops to 31%, and the tools that should support it are largely missing. Only 3% offer personalised search or behaviour-based recommendations, and just 7% include user-generated content on PDPs. In a category where relevance and trust are key, customers are still left to navigate largely on their own.

The same gap appears in how brands educate and inspire. While content is critical to decision-making, only 7% maintain a consistent video strategy and just 13% use formats like live shopping. The result is an experience that lacks the depth needed to guide customers through complex, personal choices.

Beyond the purchase, the relationship remains largely transactional. While 83% offer monetary loyalty benefits and 77% push sign-ups at checkout, only 30% activate customers through behavioural triggers and just 40% offer emotional benefits. Combined with a low Customer Service score (23%) and limited access to support, engagement rarely extends beyond the transaction.

HIGHLIGHTS

83%
offer click & collect or delivery to store in checkout.

80%
store the customer's basket across devices, supporting a seamless omnichannel experience.

77%
nudge to newsletter and/or customer club sign-up during checkout.

ROOM FOR IMPROVEMENT

3%
offer personalised search or behaviour-based recommendations, limiting relevance in product discovery.

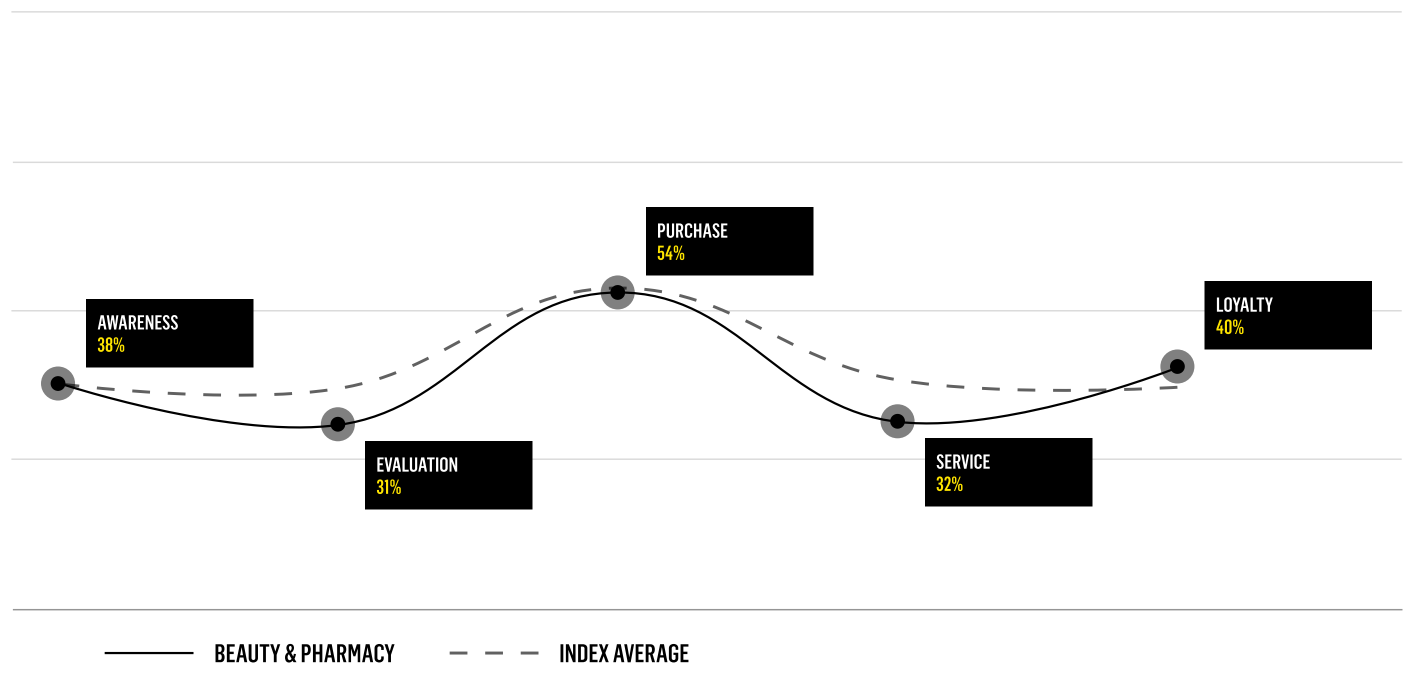
7%
maintain a consistent video strategy, despite the category's reliance on inspiration and education.

10%
reach a Google page speed score of 60/100 on FP, PLP and PDP on mobile.

DISCIPLINE SCORES

The discipline profile reflects a category that has prioritised demand generation and conversion – but has yet to invest meaningfully in service, retention, and personalisation.

INDUSTRY SCORE BY PHASE



Beauty & Pharmacy

TOP PERFORMERS

1st 69%

matas

Matas leads the Beauty & Pharmacy industry with a 69% overall score and the most complete profile in the industry. The brand stands out across the entire journey, from perfect Purchase execution to strong Loyalty, Awareness, and Evaluation. It also leads in Customer Service & In-store Support and Video, showing a clear ability to combine guidance, inspiration, and execution.

2nd 57%

KICKS

Kicks takes second place with a strong and well-rounded profile, particularly in Technical Performance, UX, and Stock Data & Fulfilment. The brand also performs well in Service and Loyalty, indicating a solid foundation for both conversion and retention. However, lower scores in Digital Marketing and Awareness suggest that while the experience works well once customers arrive, the brand is less effective at building demand and standing out earlier in the journey.

3rd 51%

Rituals secures third place with a brand-led profile that excels at visibility and inspiration. Strong performance in Digital Marketing highlights its ability to attract and engage customers. However, the experience drops off in more functional and service-driven areas, with lower scores in especially Evaluation. This points to a brand that creates strong initial engagement, but has room to strengthen the guidance and support needed to convert and retain customers.

4	DOUGLAS	49%
5	APOTEKET	47%
5	LYKO	47%
6	ICI PARIS XL	45%
7	SEPHORA	42%
8	APOTEK HJÄRTAT	41%
	AVERAGE	39%

WHAT LEADERS SHOULD PRIORITISE NEXT

01

TURN PRODUCT DISCOVERY INTO GUIDED DECISION-MAKING.

With Evaluation at 31% and only 3% offering personalised recommendations, customers are left to figure things out on their own. In a category driven by individual needs, brands must use data to deliver relevant recommendations, smarter search, and tailored guidance that helps customers choose with confidence.

02

INVEST IN CONTENT THAT EDUCATES, NOT JUST INSPIRES.

Only 7% maintain a consistent video strategy and just 13% use formats like live shopping, despite the category's reliance on education. High-quality content – from tutorials to expert advice – should play a central role in helping customers understand products, ingredients, and suitability.

03

BUILD RELATIONSHIPS BEYOND THE TRANSACTION.

While 83% offer monetary loyalty benefits and 77% push sign-ups at checkout, only 30% activate customers through behavioural triggers. The opportunity is to use CRM and customer data to deliver timely, personalised engagement that builds trust, drives repeat purchases, and increases lifetime value.

Department Stores

AVG. SCORE: 36%

Department Stores & Hypermarkets have an overall score of 36%, reflecting an industry that performs consistently across the journey, but rarely stands out.

This is a category defined by scale, frequency, and breadth of assortment. Customers often arrive with varied intent, from planned purchases to spontaneous needs, which places high demands on discoverability, relevance, and convenience.

Performance across the journey is relatively even. Awareness leads at 41%. Purchase (39%) and Loyalty (39%) follow, while Service (31%) and Evaluation (31%) trail slightly behind. The gap between best and worst phases is narrow, pointing to an industry that delivers a stable, but largely undifferentiated experience.

The fundamentals are firmly in place. 97% of brands are active on visual social platforms, 79% offer click & collect or delivery to store, and 72% deliver fast mobile performance. Combined with 66% showing local store availability on PDPs, the experience is reliable, accessible, and store-connected.

But beyond these basics, the experience lacks depth. In a category defined by large assortments, discovery remains surprisingly manual. Only 12% offer personalised product recommendations, just 7% support behaviour-based search, and only 14% show signs of natural language understanding. Even more advanced capabilities like image-based search are almost non-existent (3%). As a result, customers are left to navigate extensive product ranges with limited guidance or relevance.

The gap continues in assisted and in-store experiences. While stores play a central role, only 38% enable customers to chat with store staff for advice, and just 3% support Mobile POS, limiting the ability to connect physical interactions with digital journeys.

The discipline profile reflects the same pattern. While operational and marketing capabilities are mature, CRM (37%), Customer Service (25%), Video (32%), and especially AI (12%) lag behind, constraining both personalisation and the ability to simplify complex journeys.

HIGHLIGHTS

97%

are active on visual and emerging social platforms, ensuring consistent visibility and traffic generation.

79%

offer click & collect or delivery to store, reinforcing strong integration between digital and physical channels.

66%

show local store availability on PDPs, supporting convenience-driven purchasing behaviour in a high-frequency category.

ROOM FOR IMPROVEMENT

10%

offer personalised product recommendations, limiting relevance across large and complex assortments.

14%

support natural language understanding, and only 7% enable behaviour-based search, creating friction in product discovery.

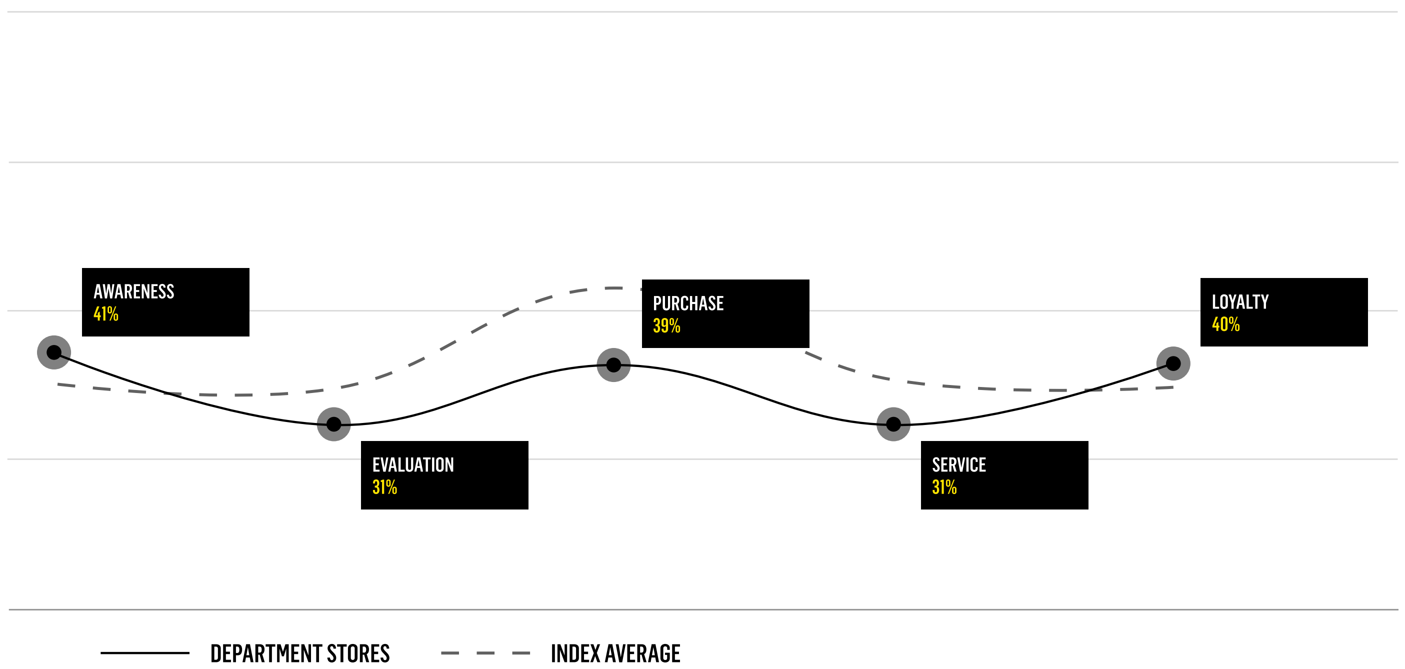
3%

support Mobile POS in-store, restricting the ability to connect physical service with digital journeys.

DISCIPLINE SCORES

The discipline profile reflects an industry with solid marketing and operational capabilities – but one that lacks depth in service, sustainability and emerging technologies, limiting its ability to create more engaging, personalised and differentiated experiences.

INDUSTRY SCORE BY PHASE



Department Stores

TOP PERFORMERS

1st	53%	HEMA
2nd	50%	ÅHLÉNS
3rd	46%	de Bijenkorf, Clas Ohlson

HEMA leads the Department Stores & Hypermarkets category with a strong and well-balanced profile. It stands out particularly in Digital Marketing and Awareness, showing an ability to consistently drive traffic and stay visible. At the same time, areas like Service and AI highlight where the experience still lacks depth, particularly when it comes to assisted and personalised interactions.

Åhléns takes second place with a profile rooted in operational strength. High scores in Best Practice UX and Service indicate a brand that prioritises usability and support across the journey. Combined with strong Stock Data & Fulfilment, this creates a reliable and functional experience. The gaps appear in more advanced capabilities, particularly Video and AI, suggesting limited investment in inspiration and emerging technologies.

De Bijenkorf and Clas Ohlson share third place, but with clearly different strengths. De Bijenkorf is more brand and experience-led, with strong performance in Digital Marketing and Technical, supported by solid UX and Video. This points to a brand that creates a polished and engaging experience, but with less emphasis on operational depth and service. Clas Ohlson, by contrast, is more operationally driven. It stands out in Stock Data & Fulfilment and performs consistently across CRM, Marketing, and UX, creating a reliable and functional experience. However, lower scores in Technical, Video, and AI highlight where the experience lacks the same level of refinement and differentiation.

4	STOCKMANN	43%
4	ILLUMS BOLIGHUS	43%
5	MAGASIN	42%
6	FØTEX	39%
6	TOKMANNI	39%
7	BILKA	36%
	AVERAGE	36%

WHAT LEADERS SHOULD PRIORITISE NEXT

01

TURN SCALE INTO RELEVANCE THROUGH PERSONALISATION.

With only 12% offering personalised recommendations and limited intelligent search, large assortments remain difficult to navigate. Leaders need to use data and AI to surface relevant products, simplify choice, and make the experience feel curated rather than overwhelming.

02

CONNECT STORE AND DIGITAL INTO ONE SEAMLESS EXPERIENCE.

Despite strong store integration in fulfilment, only 3% support Mobile POS and 38% enable direct access to store staff. Bridging this gap – through assisted selling, real-time support, and connected journeys – will help unlock the full value of physical retail.

03

MOVE FROM TRANSACTIONAL TO CONTINUOUS ENGAGEMENT.

With high purchase frequency but low activation, there's a huge, untapped opportunity in building ongoing relationships. Using CRM and behavioural triggers to personalise communication, drive repeat visits, and increase basket size will turn scale into long-term value.

Kids

AVG. SCORE: 35%

The Kids category score of 35%, highlighting an industry that delivers on basic needs, but struggles to build a more complete and differentiated customer experience.

This is a category shaped by urgency, repetition and low tolerance for friction. Parents rarely browse without intent – they shop to solve immediate needs, often across multiple channels and under time pressure.

At the same time, those needs evolve quickly as children grow, making repeat purchases frequent but rarely identical. That makes relevance just as important as speed.

The industry delivers well on efficiency. With Purchase at 50%, the path to conversion is highly streamlined. 100% deliver fast site performance, 92% show local store availability, and 85% offer click & collect or delivery to store, alongside widespread in-store returns.

These are table stakes in a category where convenience is non-negotiable.

But efficiency alone is not enough. The challenge lies in helping customers make the right choice. Despite large assortments and frequent repeat needs, discovery remains largely manual.

Only 15% offer personalised recommendations and 15% support natural language search, meaning parents still have to navigate and filter options themselves.

The same pattern extends beyond the purchase. While 77% push loyalty sign-ups and offer monetary incentives, Loyalty reaches just 30%. With only 8% activating customers through behavioural triggers, engagement is driven by necessity rather than relevance.

The result is an experience that removes friction from buying, but not from deciding, performing well when needs are clear, but offering limited support when they are not.

HIGHLIGHTS

100%
deliver fast site performance, ensuring a consistently smooth and time-efficient experience for parents under pressure.

85%
show local store availability on PDPs, making it easy to quickly find and purchase essential items nearby.

77%
offer monetary benefits for loyalty club members.

ROOM FOR IMPROVEMENT

15%
show personalised recommendations on homepage, limiting relevance in a category driven by repeat purchases and evolving needs.

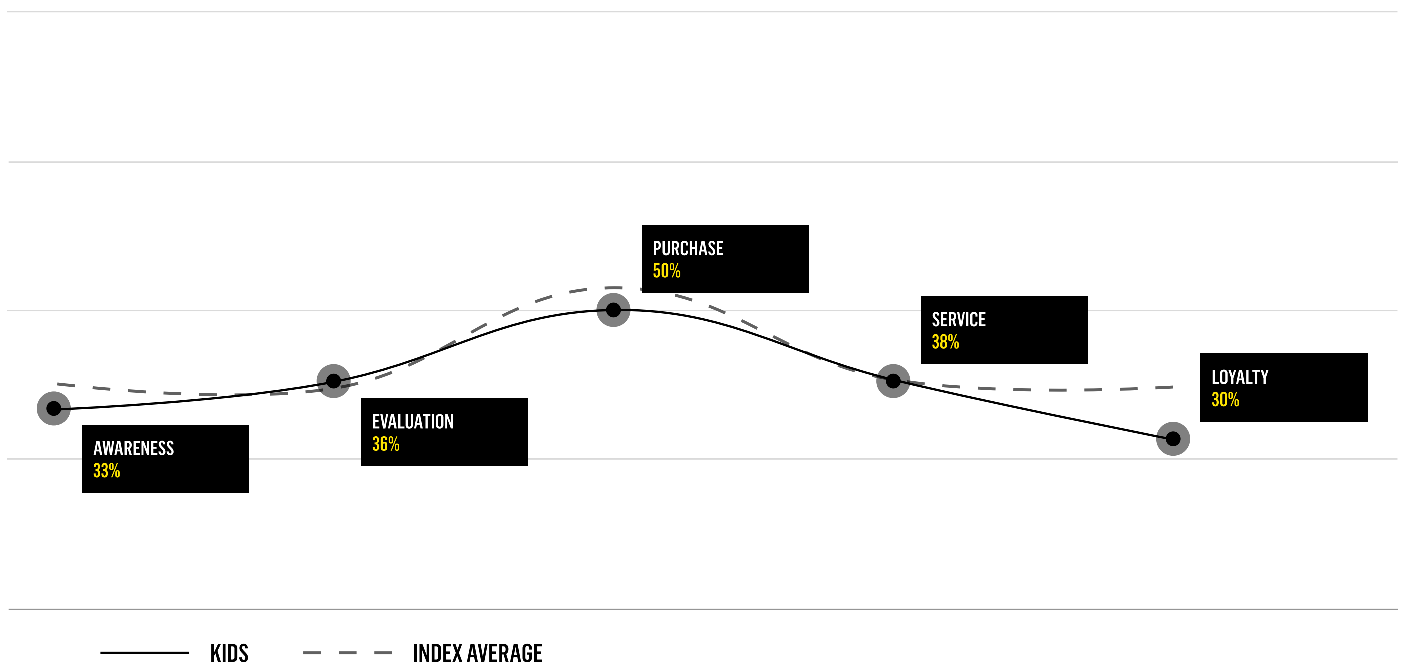
15%
support natural language search, making product discovery more manual than it should be.

8%
send automated emails based on websire behaviour within 48 hours.

DISCIPLINE SCORES

The discipline profile reflects an industry with strong operational execution – particularly in stock, UX and technical performance – but one that underinvests in service, CRM and inspiration, limiting its ability to support parents beyond the transaction and build long-term relationships.

INDUSTRY SCORE BY PHASE



Kids

TOP PERFORMERS

1st	BabySam	47%
2nd	Barnas Hus, P O. P	42%
3rd	Reima, Kids Coolshop	41%

BabySam leads the Kids category with a strong and well-rounded operational profile. High scores in Stock Data & Fulfilment and Digital Marketing are supported by solid Purchase and Loyalty, pointing to a brand that executes reliably across the journey. The gaps appear in more advanced areas like AI, suggesting limited use of more innovative tools.

Barnas Hus and Polarn O. Pyret share second place, but with different strengths. Barnas Hus stands out on Loyalty and Customer Service, indicating a stronger focus on supporting customers post-purchase, however, the Awareness phase lag behind. Polarn O. Pyret, on the other hand, performs well in Sustainability and maintains a balanced profile across Purchase and UX, but lower CRMand Stock & Fulfilment point to friction in the buying experience.

Kids Coolshop's performance is driven by strong top-of-funnel and technical execution, with standout scores inTechnical Performance and UX, supported by solid Evaluation. However, this strength doesn't fully translate into the rest of the journey. Loyalty and Customer Service remain underdeveloped, highlighting a gap between attracting customers and retaining them over time. Reima, by contrast, shows a more balanced and brand-led profile. Strong performance in Sustainability, Awareness and Digital Marketing highlights its ability to build visibility and trust. However, weaker results in Stock Data & Fulfilment and AI point to gaps in operational depth and more advanced capabilities.

4	DREAMBABY	35%
4	INTERTOYS	35%
5	KING JOUET	32%
5	DREAMLAND	32%
5	BR	32%
	AVERAGE	35%

WHAT LEADERS SHOULD PRIORITISE NEXT

01

MAKE DISCOVERY FASTER AND MORE RELEVANT.

With only 14% offering personalised recommendations and 14% supporting natural language search, product discovery is still too manual. In a time-pressured category, improving search, filtering and recommendations is key to helping parents find the right products faster.

02

TURN REPEAT PURCHASES INTO REAL RELATIONSHIPS.

While 77% push sign-ups and offer monetary benefits, the Loyalty phase remains low at 30%. The gap is in activation. Behavioural triggers (8%) and more meaningful engagement can turn frequent transactions into ongoing relationships.

03

EXTEND CONVENIENCE INTO REAL SUPPORT.

The category delivers on speed, but less on service. With only 8% offering digital support outside opening hours, there's a clear opportunity to support parents when and where needs arise – across both digital and in-store touchpoints.

House & Garden

AVG. SCORE: 34%

House & Garden sits in the lower half of the 2026 index with an average score of 34%. This is a category defined by intent and complexity. Customers rarely shop for a single product – they are solving problems, managing projects, or improving spaces.

That means journeys are longer, decisions are more considered, and the need for guidance, availability, and reassurance is significantly higher than in most retail categories.

The operational backbone is strong. Stock Data & Fulfilment (50%), UX (42%), and Technical Performance (43%) create a reliable and accessible experience, while Purchase (51%) is the strongest phase.

Capabilities like local store availability on PDP (86%) and click & collect or delivery to store (86%) make it easy for customers to act once they know what they need.

But getting to that point remains a challenge. Despite 88% of brands being active on visual and social platforms, Awareness (33%) and Evaluation (32%) remain low. Visibility is there, but it doesn't translate into meaningful consideration.

The gap is most visible in discovery and decision support. Only 4% offer image-based search, just 4% enable behaviour-based search, and only 14% provide AI-assisted or guided selling. In a category where customers often start with a project or problem rather than a specific product, this creates friction early in the journey and slows down decision-making.

Support is equally limited. While stores play a central role, only 12% enable chat with store staff for advice, and just 14% provide digital support outside opening hours, despite the fact that most home improvement projects happen in the evenings and weekends.

Loyalty sits at 29%, and while 61% offer monetary benefits and 78% push sign-ups at checkout, only 18% activate customers through behavioural triggers. In a category built on repeat projects and long-term needs, the relationship remains largely transactional.

Together, this limits both inspiration and the ability to guide customers through complex, multi-step purchases.

HIGHLIGHTS

86%

show local store availability on PDP, reinforcing the importance of proximity and immediate access in a project-driven category.

75%

show at least two personalised up- and cross-selling opportunities on PDP.

67%

use in-store QR codes to provide additional product or category information, bridging physical and digital touchpoints in the decision process.

ROOM FOR IMPROVEMENT

4%

support image-based search, limiting discovery in a category where customers often start with inspiration or a problem rather than a product.

14%

offer guided selling or AI-assisted support, despite the need for advice in complex, project-based purchases.

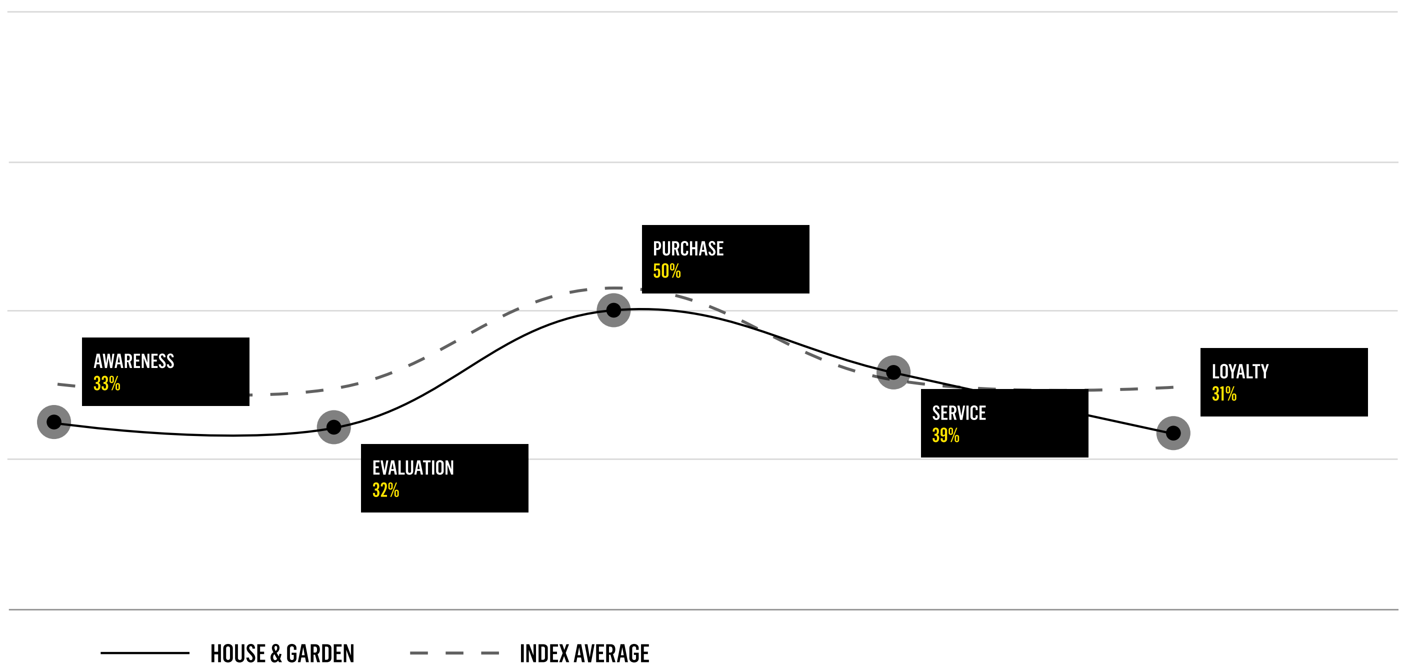
14%

offer click & collect or click & reserve within 4 hours on PDP.

DISCIPLINE SCORES

The discipline profile reflects an industry with solid operational foundations – particularly in stock, UX and technical performance – but one that underinvests in the capabilities that drive inspiration, guidance and long-term engagement across the journey.

INDUSTRY SCORE BY PHASE



House & Garden

TOP PERFORMERS

1st	51%	Karwei
2nd	50%	GAMMA, Praxis
3rd	49%	Hubo, JULA

Karwei leads the industry on the strength of its commercial performance. Purchase, Loyalty and CRM all sit well above industry level, reflecting a brand that not only converts effectively but also retains customers. The limitation is earlier in the journey. Awareness and Evaluation are weaker, and lower scores in Video and AI point to limited investment in inspiration and guided discovery. Karwei wins by closing demand, not necessarily by creating it.

GAMMA and Praxis share second place but with clearly different profiles. GAMMA is operationally strong, with Purchase supported by solid Technical Performance and UX, creating a reliable buying experience. The drop comes after conversion, where Service lag behind. Praxis takes a more customer-facing approach. It stands out in Service and performs well in Digital Marketing and CRM, pointing to stronger engagement. However, weaker Technical Performance suggest a less seamless path to conversion.

Hubo Belgium and Jula take third place with contrasting strengths. Hubo is defined by consistency, led by strong Stock Data & Fulfilment and solid performance across Purchase, UX and CRM, but without a clear standout area. Jula is more technically driven, leading in Technical Performance and delivering strong Purchase. However, weaker Stock Data & Fulfilment and low Video performance limit both operational depth and inspiration, holding back the overall experience.

4	OBS BYGG	46%
4	BRICO	46%
5	MEGAFLIS	45%
5	RUSTA	45%
	AVERAGE	35%

WHAT LEADERS SHOULD PRIORITISE NEXT

01

BUILD JOURNEYS AROUND PROJECTS, NOT PRODUCTS.

With Evaluation at 32% and limited discovery support, customers struggle to move from idea to execution. Structuring journeys around projects, use cases, and outcomes – supported by content, bundles, and guided flows – will better reflect how customers actually shop the category.

02

CONNECT STORES AND DIGITAL INTO ONE GUIDED EXPERIENCE.

With 86% showing store availability but only 12% enabling direct access to store staff, there is a clear disconnect. Enabling real-time advice, assisted selling, and seamless transitions between channels will turn stores into a true extension of the digital experience.

03

TURN ONE-OFF PURCHASES INTO ONGOING RELATIONSHIPS.

Loyalty is the weakest phase at 29%, and only 18% activate customers post-purchase. In a category built on repeat projects, brands need to use CRM and data to stay relevant – through project follow-ups, replenishment, and personalised communication that brings customers back over time.

Pets, Gifts & Hobby

AVG. SCORE: 34%

Pets, Gifts & Hobby scores 34%, reflecting an industry that performs well when customers arrive with intent, but underdelivers in helping them discover, decide and return.

This is a category defined by diversity. It spans routine, repeat purchases (pet food, supplies) and more exploratory, inspiration-driven shopping (gifts, hobbies). That creates a dual expectation: efficiency for known needs, and guidance for everything else.

The industry delivers on the first. Purchase leads at 47%, supported by strong fundamentals: 82% deliver fast site performance, 65% show local store availability and offer click & collect or delivery to store, and 65% support in-store returns. Combined with 71% showing reviews and 59% enabling cross- and up-selling on PDPs, the path to purchase is generally smooth and commercially optimised.

But beyond that moment, the experience loses direction. Discovery remains limited. Only 18% offer personalised recommendations, 8% support behavioural or optimised search, and 0% enable visual search. In a category driven by interest, inspiration and niche needs, customers are still expected to navigate largely on their own.

Service is the weakest point at 27%, and the supporting touchpoints reflect it: only 29% offer access to in-store expertise, 14% provide support outside opening hours, and just 12% use AI as guided selling. Whether it's pet care advice, gift inspiration or hobby expertise, support is inconsistent.

The gap continues into retention. While 88% offer monetary loyalty benefits and 59% push sign-ups at checkout, only 18% activate customers through behavioural triggers and 29% offer emotional benefits. Loyalty sits at 41%, but is largely driven by transactions rather than engagement.

HIGHLIGHTS

100%
are active on visual and emerging social platforms, ensuring strong visibility in a category driven by inspiration and interest.

82%
deliver fast desktop performance (≤2.5s load time), supporting efficient browsing across large and varied assortments.

65%
offer click & collect or delivery to store and show local store availability, enabling flexible purchasing for both planned and urgent needs.

ROOM FOR IMPROVEMENT

0%
support visual or image-based search, limiting discovery in a category where inspiration, hobbies and exploration play a key role.

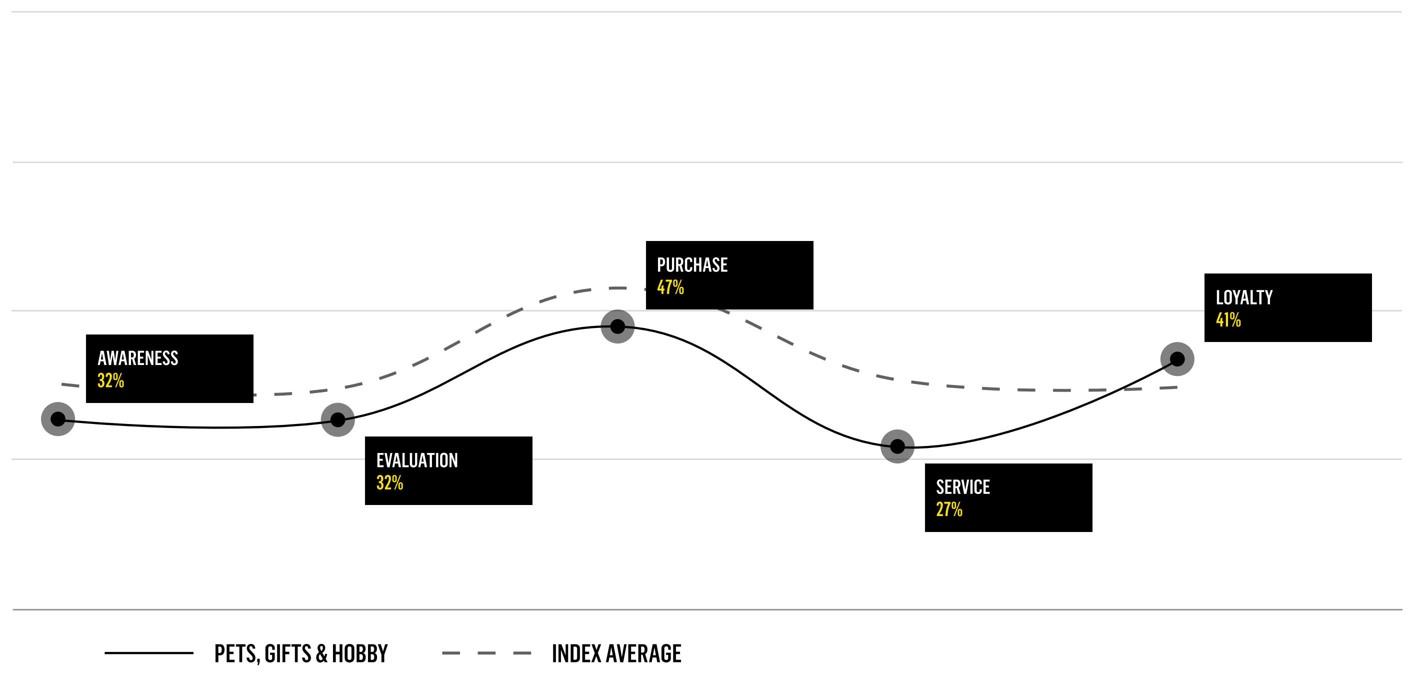
18%
support personalised product recommendations, reducing relevance in a category with highly diverse customer needs – from pet care to niche hobbies.

24%
support click & collect or reserve within 4 hours, creating friction in time-sensitive purchases such as gifts or essential pet supplies.

DISCIPLINE SCORES

The discipline profile reflects an industry with solid foundational capabilities across UX, technical and CRM – but one that underinvests in service, inspiration and sustainability, limiting its ability to guide diverse customer needs and build deeper, long-term engagement.

INDUSTRY SCORE BY PHASE



Pets, Gifts & Hobby

TOP PERFORMERS

1st	49%	norli
2nd	45%	Bog&idé, SUOMALAINEN KIRJAKAUPPA
3rd	43%	Musti ja Mirri

Norli leads the category with a strong and well-balanced profile, driven by standout Technical Performance and solid Purchase and Digital Marketing. Loyalty is particularly strong, pointing to a brand that successfully retains customers over time. The gaps appear in more advanced areas, with AI at 20% and relatively low Customer Service (36%), suggesting limited support beyond the core journey.

Bog & Idé and Suomalainen Kirjakauppa share second place, but with different strengths. Bog & Idé stands out with exceptional Loyalty (87%) – a brand that clearly understands how to retain and engage customers. However, a lower Purchase score suggests friction closer to conversion. Suomalainen Kirjakauppa, on the other hand, is more commercially balanced, with strong UX and CRM. But weaker Technical Performance and Stock & Fulfilment point to operational gaps that hold back the overall experience.

Musti & Mirri's strength lies in conversion and operational execution, with solid Purchase and relatively strong CRM. However, a low Service score and an alarmingly low score in AI (0%) highlight gaps in supporting customers beyond the transaction, particularly in a category where ongoing needs and guidance are key.

4	ARKENZOO.SE	42%
5	LEGO	41%
6	STANDAARD BOEKHANDEL	38%
7	ARK BOKHANDEL	36%
7	ZOO.SE	36%
8	PANDURO	35%
	AVERAGE	34%

WHAT LEADERS SHOULD PRIORITISE NEXT

01

STRENGTHEN DISCOVERY ACROSS DIVERSE NEEDS.

With only 18% offering personalised recommendations and minimal support for optimised search, discovery is still too manual. In a category spanning everything from essentials to niche hobbies, better navigation, filtering and recommendations are key to driving both relevance and conversion.

02

SCALE EXPERTISE AS A SERVICE LAYER.

Service is the weakest phase at 27%, despite the category's reliance on guidance. Expanding access to advice – from in-store expertise to digital support and guided selling – will be critical to helping customers choose with confidence.

03

ACTIVATE LOYALTY BEYOND TRANSACTIONS.

While 88% offer monetary benefits, only 18% activate customers through behavioural triggers. The opportunity is to use CRM and data to drive ongoing engagement – turning repeat purchases into stronger, more valuable relationships.

Disciplines

Across disciplines, the pattern is clear: the foundations are strong, but differentiation is limited. UX, Technical Performance and Fulfilment have reached a level of maturity where most brands deliver fast, functional and reliable experiences.

What's missing is what sits on top. The capabilities that shape how customers discover, evaluate and engage are still underdeveloped, leaving journeys efficient, but often generic. That means most brands are optimised for transactions, not for how customers actually decide, feel or build relationships with a brand. The journey works, but it rarely stands out.

The next wave of performance will come from closing this gap. From strengthening the capabilities that support discovery, decision-making and engagement – and turning functional journeys into experiences that feel personal, build trust and give customers a reason to return.

Discipline Performance Overview

BEST PRACTICE UX	46%
TECHNICAL PERFORMANCE & MASTER DATA	45%
DIGITAL MARKETING	44%
STOCK DATA & FULFILMENT	43%
CRM & CUSTOMER DATA	37%
CUSTOMER SERVICE & IN-STORE SUPPORT	31%
SUSTAINABILITY & COMPLIANCE	30%
VIDEO	29%
AI	19%

Disciplines side by side

CRM & Loyalty

STRONG CAPTURE, WEAK ACTIVATION

CRM sits mid-range, with 77% pushing sign-ups at checkout and 59% supporting in-store enrolment. But engagement is shallow.

However, engagement remains shallow. Only 27% trigger behavioural communication and just 20% offer emotional loyalty benefits. The opportunity is not more data, but better activation, using it to stay relevant beyond the transaction.

Customer Service

FUNCTIONAL, BUT NOT ACCESSIBLE

Customer Service remains low, with strength concentrated in operational touchpoints such as staff-assisted ordering and access to order history. But broader support is limited: only 33% enable customers to chat with store staff for advice, 9% provide help outside opening hours, and just 5% support Mobile POS.

The result is service that supports transactions better than decisions. The opportunity is to make support more available, proactive and relevant across the full journey.

Digital Marketing

HIGH ACTIVITY, LOWER IMPACT

Marketing is one of the most active disciplines, with 92% of brands present on key social platforms and 76% posting frequently.

But performance drops further down the funnel. Only 10% see significant brand search growth, and just 28% leverage local inventory ads. The opportunity is clear: move from visibility to intent, connecting campaigns more directly to store traffic, product availability and conversion.

Video

PRESENT, BUT UNDERUTILISED

Video sits at 29%, with moderate adoption of formats and social engagement. But it rarely supports decision-making. Only 35% use video on PDPs, and just 10% leverage live shopping.

The opportunity is to bring content closer to conversion, supporting understanding, comparison and confidence.

Sustainability

PROGRESSING, BUT NOT YET EMBEDDED

Sustainability scores remain low, with progress concentrated in a few core areas like repair (59%) and accessibility (42%). More advanced capabilities – such as re-commerce and sustainable incentive mechanics – remain limited, and rarely influence how customers evaluate products.

Generally, sustainability is moving from compliance to a factor in decision-making. Emerging capabilities like Digital Product Passports point in this direction, bringing transparency directly into the product experience.

AI

HIGH POTENTIAL, LIMITED ADOPTION

AI is the lowest-performing discipline at 19%. Adoption of key capabilities is minimal: 3% offer image search, 11% support natural language, and 13% use AI as a guided sales assistant.

As search shifts and agentic commerce emerges, AI will increasingly shape how customers discover, evaluate and act. Brands that successfully operationalise AI – through smarter search, guided journeys and proactive assistance – will define how decisions are made.

UX & Technical Performance

STRONG FOUNDATIONS – NOW RAISE THE BAR

UX and Technical are among the strongest disciplines across industries. Core usability, speed and structure are largely in place, with up to 76% hitting key performance benchmarks like load time and image optimisation.

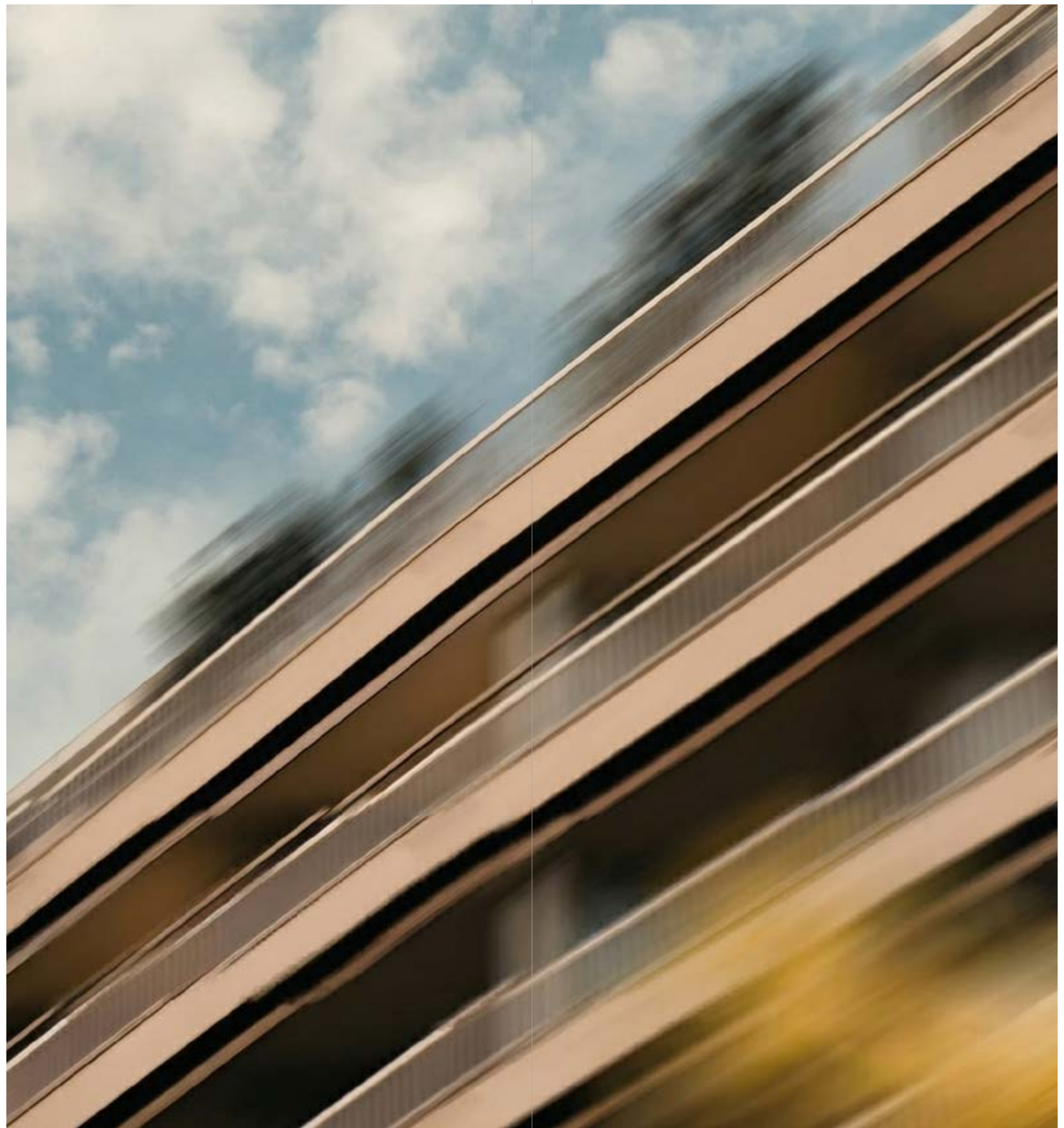
But the opportunity now is quality, not just consistency. Only 13% show personalised recommendations on homepage, and just 16% support local inventory filtering. The next step is moving from functional UX to decision-enabling UX, helping customers find, compare and choose faster.

Stock & Fulfilment

OPERATIONALLY STRONG, BUT STILL NOT FLEXIBLE ENOUGH

Stock & Fulfilment performs well, with 74%+ offering click & collect and 69% showing store availability on PDPs. This reflects a mature omnichannel backbone.

The gap lies in speed and flexibility. Only 17% offer click & collect within 4 hours, and just 7% provide same-day delivery. For product categories driven by urgency or convenience, this is a clear opportunity to differentiate.



WHAT THIS MEANS

Across disciplines, the pattern is consistent:

- ***Foundations are strong*** (UX, Tech, Fulfilment)
- ***Activation layers are weak*** (Service, AI, CRM, Content)

The next wave of performance will come from connecting these disciplines, turning operational strength into smarter, more guided and more personalised experiences.

Everyone's talking about AI. Almost nobody's implementing it.

Why the most talked-about technology in commerce is also the lowest-scoring – and where the real gap between ambition and execution lies.

Insights by:
Ask Ullerup
CTO & Management Consultant
IMPACT Commerce

AI dominates every commerce conference keynote, every earnings call, every strategy deck. It is, without question, the most discussed topic in e-commerce right now.

It is also the lowest-scoring category in this year's Omnichannel Index.

Across 373 brands and five AI-related questions, only 19% of possible scores came back positive. For context: Best Practice UX scores 46%. Technical Performance sits at 45%. Even Video manages 30%. AI trails every single category, and it isn't close.

This article isn't about what AI could do. It's about what brands are actually doing with it – and where the gap between ambition and execution is widest.

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CUSTOMER SERVICE & IN-STORE SUPPORT	31%
VIDEO	30%
SUSTAINABILITY & COMPLIANCE	29%
AI	19%

11% support natural language (semantic search)

3% offer visual search

26% have an AI chatbot

42% have pages structued for AI agents reliably read

A NEW RECIPIENT

For two decades, "responsive design" has meant adapting the same content for different screens. Desktop to mobile to tablet. The layout changed, but the recipient was always the same: a human being browsing with their eyes and deciding with their gut.

That's no longer the full picture. A new type of recipient is arriving on your pages – AI agents that browse, parse, and represent your products on behalf of consumers. They don't scroll. They aren't moved by your hero images. They read structure, extract attributes, and make judgments about relevance based on how well your content is organised for machine consumption.

And this isn't a future scenario. It's already happening through AI-powered shopping assistants, comparison tools, and recommendation engines that scrape and interpret product pages. To measure how prepared brands are for this shift, we assessed whether key pages (homepages, PDPs, and editorial content) are structured in a way that AI agents can reliably parse and represent.

Only 42% of brands scored positively.

What's emerging is a fundamentally different recipient, with its own behavioural patterns and expectations. It demands deliberate design consideration alongside (not instead of) the human experience.

WHAT AGENTS LEAVE BEHIND

The arrival of AI agents isn't just a technical concern. It changes the stakes for every human interaction your brand has.

Agents don't replace your site. They don't make filters or product grids obsolete. What they absorb are tasks – the boring, repetitive, high-confidence decisions where the customer already knows what they want and just needs execution. Rebooking a hotel. Reordering contact lenses. Comparing energy prices. Finding the cheapest flight on specific dates. These are errands, and agents are built to handle them.

What they leave behind is everything that requires judgment, taste, or trust. The customer who doesn't know which running shoe fits their gait. The one choosing between three sofas who needs to feel confident about the fabric. The one with sensitive skin trying to find a moisturiser that won't react.

These people still show up on your site. But they're not there to browse a grid and apply filters. They're there because the decision is hard enough that they don't trust an agent to make it for them. That makes them fewer, more intentional, and carrying higher expectations than anything in the browse-and-buy era.

So now you have two problems. A new recipient that needs machine-readable content. And a remaining human audience that expects more from every interaction, precisely because the easy stuff has been delegated away.

WHERE THE HUMAN EXPERIENCE IS FAILING

Traditional search forces customers to express themselves on the engine's terms, inlcuding guessing the right keyword, the right product tag, the right category name. Semantic search flips that. It lets the customer describe what they actually want – "lightweight summer jacket that doesn't wrinkle" – and the engine figures out what they mean. 11% of brands offer this. The rest still make the customer do the translating. Visual search – uploading a photo of what you want – sits at 3%. That's twelve brands out of 373.

These aren't feature gaps on a checklist. They're failed interactions with a customer who showed up expecting to be understood and who had every option to delegate this errand to an agent instead.

Conversational shopping is the missing sales associate. 26% of brands have deployed an AI chatbot. That's the highest score among the five AI questions, and it's easy to see why: chatbots deflect support tickets and reduce cost-to-serve. But only 13% offer anything resembling conversational shopping – an AI that acts as a guided sales associate, helping the customer navigate the catalog based on their actual needs.

The category data sharpens this. Beauty & Pharmacy – a category where product selection is deeply personal, dependent on skin type, sensitivities, and individual preferences – scores 3% on conversational shopping. Department Stores and Hypermarkets, with the broadest catalogues and the most overwhelming browsing experiences, score 0%. Not one brand out of 25 offers guided AI shopping.

These are the categories where a human customer most needs help making a decision. And they're the categories most absent from the one AI application that directly serves that need.

THE COST-CENTRE TELL

The gap between chatbot adoption and conversational shopping reveals where brands see AI's value: as a cost-reduction tool, not a revenue driver. The highest-scoring AI feature is the one that deflects support tickets. The lowest-scoring is the one that acts as a sales associate.

That priority is backwards if agents are about to absorb the easy tasks anyway. The utilitarian interactions brands are racing to automate with chatbots are the same ones agents will handle on the customer's behalf. What remains – the hard decisions, the high-consideration purchases, the moments where someone genuinely needs guidance – demands the investment brands aren't making.

Brands are spending on AI that answers the questions agents will soon handle. They're underinvesting in AI that helps with the decisions only a human would show up to make.

WHERE THIS LEAVES YOU

The pressure is coming from both directions. A new recipient is arriving that needs structured, machine-readable content. And the human customers who remain are showing up with higher expectations, precisely because the routine has been delegated away.

19% says most brands aren't there on either side.

The starting point is deciding which one matters most to you right now: making your content ready for the agents already parsing your pages, or making the human experience worth showing up for.

Both require the same thing: a clear view of where AI fits into your customer experience – from the data and automation layer underneath to the brand safety, tone of voice, and personalisation strategy on top. The question is whether you have that layer in place to serve both recipients.

READY FOR THE NEXT ERA OF AGENTIC COMMERCE?

The brands that win won't just be visible to AI agents – they'll be ready to transact with them. Here's how we help you get there.

01

AI VISIBILITY REPORT

See your brand the way AI agents do. Identify gaps, fix blind spots, benchmark against competitors.

02

ROADMAP & BUSINESS CASE

Define your highest-value agentic use cases, quantify the impact, and build a 12–24 month plan your organisation can act on.

03

AGENTIC CHECKOUT READINESS

Assess whether your platform can support agent-initiated transactions and map out exactly what it takes to get there.

If you want to nerd out about what the next era of agentic commerce means for your business with an actual human (not an AI) Ask is your guy. He's spent years at the intersection of data, martech and commerce architecture – and he's always up for a good conversation about where this is all heading.

Catch him at ask@impactcommerce.com

AI is rewriting the rules of retail.

How to prepare your organisation for AI-driven commerce – and the strategic priorities that will separate leaders from the rest.

Insights by:
Marleen Smit
Director Retail Benelux
Google

We see over five trillion searches on Google every year. And that number keeps growing. With AI Overviews and AI Mode, people are searching more – asking longer, more complex questions than ever before. This means they're also finding more links, which means more opportunities for brands to be discovered and clicked.

But something more fundamental is shifting beneath the surface. Consumers aren't just searching differently. They're starting to delegate. This is the transition that defines the next era of retail.

FROM TOOL TO AGENT

For years, AI has played a supporting role in retail – recommending products, personalising emails, optimising ad spend. Useful, but still reactive. Still dependent on a human clicking "buy."

That's changing. Agentic commerce – where AI acts on a consumer's behalf, tracking a product, waiting for a price to drop, completing the purchase – is moving from concept to reality. The infrastructure is being built now.

Google and Shopify, Etsy, Wayfair, Target and Walmart are among those co-developing the Universal Commerce Protocol (UCP), an open standard that enables AI agents, businesses and payment systems to interact seamlessly. It's designed to ensure that even as AI mediates more of the journey, the customer relationship stays central to the retailer.

With 51% of consumers already familiar with AI agents (Google, 2024), the technology is no longer ahead of the audience. Advancing our retail infrastructure is the next phase of the project.

THE CHOICE PARALYSIS PROBLEM

There's a parallel challenge worth naming. 63% of shoppers abandon purchases simply because they are overwhelmed by choices and information (Google, 2024). Not because they couldn't find the product, but because the experience of finding and deciding became too much work. A further 62% say purchase decisions take more effort than before (Google, 2024).

This is where AI's role as an intelligent curator becomes commercially critical. Rather than returning search results, AI – through features like AI Overviews and AI Mode – provides personalised, intent-driven guidance that helps consumers bypass choice paralysis.

For retailers, this is both an opportunity and a pressure: if your content, data and product information aren't structured for AI to interpret and surface, you won't be part of that curated shortlist.

AI Mode in Search now has over 75 million daily active users (Google, 2024), which means the audience for AI-mediated discovery is already here.

THE PHYSICAL WORLD IS GOING MULTIMODAL

Digital transformation is no longer confined to screens and text. Google Lens processes over 25 billion searches monthly and one in five of those has commercial intent (Google, 2024). Consumers are pointing their phones at products they see in a window, a magazine, or a friend's kitchen, and expecting to find and buy them instantly. Retailers who optimise only for text-based search are leaving a significant part of the journey unaddressed.

Alongside visual search, query behaviour is also changing. In AI Mode, consumers are asking questions that are 2–3x longer than traditional search queries – more nuanced, more conversational, more specific. Short product titles and thin descriptions are increasingly inadequate. Rich, contextual product content is what gets surfaced.

SPEED OF CREATIVE HAS TO MATCH SPEED OF THE CONSUMER

Today's consumer journey doesn't follow a straight line. It's a continuous loop of searching, scrolling, streaming, and shopping, across more than 130 daily mobile touchpoints (Google, 2024). Manual marketing can't keep up with that.

Retailers need to rethink how they produce and deploy creatives. Fully integrating generative AI into creative workflows – as a real-time partner, not a post-production shortcut – allows brands to produce studio-quality assets in minutes and match them dynamically to the nuanced, long-form queries consumers are now asking. Marketers who deeply integrate AI tools report 60% greater revenue growth than peers who don't (Google, 2024).

BUILDING THE CAPABILITIES TO COMPETE

Getting the strategy right is one thing. Building the organisational capabilities to execute is another.

Retailers must embrace a predictive, test-and-learn approach to AI. Google is constantly evolving its ad formats and tools – and retailers need to move with that pace, not behind it. That means feeding high-quality inputs into AI-powered tools: strong landing pages, well-structured creative assets, and clearly defined business goals. The quality of what goes in determines the quality of what comes out.

It also means deepening the integration of AI marketing tools across the board. AI-powered campaigns – including AI Max for Search, Demand Gen, and Performance Max – are built to adapt to the non-linear ways consumers now discover and buy. Combined with generative creative tools, they allow brands to produce studio-quality work at scale and match ads dynamically to complex consumer intents. Marketers who deeply integrate these tools report 60% greater revenue growth than peers who don't (Google, 2024).

The gap between retailers using AI and retailers competing with AI is widening. The difference is depth of integration.

THE OMNICHANNEL SHOPPER IS YOUR MOST VALUABLE CUSTOMER

68% of consumers are channel-agnostic, moving freely between online and offline depending on the moment. And these omnichannel shoppers spend 73% more than their single-channel counterparts (Google, 2024). The business case for seamless channel integration has never been stronger.

But winning those shoppers requires delivering on three things in the physical store:

- Convenience – making the journey frictionless at every step.
- Expertise – knowledgeable in-store associates remain a powerful conversion lever. Sales influenced by store staff carry a 194% higher average order value than those that aren't.
- Experience – physical stores must be sensory, social, and worth the trip. Long queues and overcrowding are the fastest ways to undermine that expectation.

The store isn't competing with digital. It's completing it. The retailers who treat the physical experience as the culmination of a digitally-informed journey – not a separate channel – are the ones capturing the full value of that 73% spending premium.

KEY STRATEGIC PRIORITIES OVER THE NEXT 3-5 YEARS

01
BUILD FOR AGENTIC COMMERCE

Moving toward agentic AI is a defining priority. Retail leaders must work with the industry to build the blocks for agentic checkout, allowing AI to track prices and buy items when they hit a target budget. 51% of consumers already know what AI agents are (Google, 2024). Building their trust for actions like purchasing must be a strategic focus, not an afterthought.

02
INVEST IN BRAND LOVE AND CREATOR PARTNERSHIPS

Empathy pays off – consumers spend 7x more on brands they love (Google, 2024). To build that trust, retailers should prioritise co-creation with digital creators. Creators on platforms like YouTube provide a human signal that cuts through the noise, delivering 109% higher ROI than linear TV (Google, 2024). Google is also rolling out features to instantly match brands with relevant creator communities.

03
PRIORITISE FIRST-PARTY DATA AND MEASUREMENT

Campaign tooling is only as powerful as the data fuelling it. Retailers must prioritise cross-channel measurement to accurately assess performance, allocate budgets effectively and drive real, measurable growth.

The basics are in place. The experience isn’t.

Why retail UX scores a passing grade on mechanics – but fails at the moments that actually matter to customers.

Insights by:
Mey Nenadic
Senior Experience Design Manager
IMPACT Commerce

At first glance, Best Practice UX looks like one of the healthier disciplines in the Omnichannel Index 2026. An average score of 46% places it near the top – ahead of Digital Marketing (44%), CRM (37%), and well above AI (19%). On paper, retailers seem to be doing reasonably well.

But that number hides a sharp divide.

Across 16 UX touchpoints, six features sit above 70% adoption. Six sit below 17%. The space between is sparse. This is not a market gradually maturing. It is a market that has mastered the mechanics of online shopping – and barely started on the experience layer that sits on top.

The mechanics are what customers expect: wish lists, click & collect, buy now pay later, decent imagery. But these are table stakes. The experience layer is what makes a customer feel understood: personalised recommendations, intelligent search, user-generated content, product discovery that adapts to who is browsing. That layer barely exists when we look across the 373 assessed brands and retailers in the Index.

And with AI agents increasingly parsing and representing product pages on behalf of consumers – only 42% of brands in the Index have pages structured for AI to reliably read – the gap carries a second cost. A UX that fails to help a human discover the right product is also, very often, a UX that an AI agent cannot parse or recommend from either.

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VIDEO	30%
SUSTAINABILITY & COMPLIANCE	29%
AI	19%

THE TRANSACTIONAL LAYER IS DONE

Retailers across the Nordics and Benelux have converged on a shared set of checkout and product page basics. 78% use diverse image formats on product pages. 78% offer buy now, pay later. 77% nudge newsletter sign-up at checkout. 74% make click & collect visible in checkout. 73% provide a wish list. 71% show at least two forms of up- and cross-selling on PDP.

Five years ago, many of these were competitive advantages. Today they are infrastructure. Sweden illustrates the point: BNPL adoption sits at 95% – the highest single feature-market score in the dataset. It is no longer a feature. It is an expectation.

For AI agents, this transactional layer matters too. Structured payment options, clear delivery methods, and consistent product attributes are the kind of parsable information that lets an agent confidently represent your offering. A page that clearly states “click & collect available, 2-hour pickup” gives an agent something to work with. A page that buries this in a tooltip does not.

TOP 3

78%
use diverse and relevant image formats.

78%
offer ‘buy now, pay later’ online.

77%
nudge newsletter sign-up at checkout.

BOTTOM 3

6%
show user-generated content on product pages.

9%
use behaviour-based search.

13%
show personalised product recommendations on homepage.

THE EXPERIENCE LAYER BARELY EXISTS

Now look at the other end. Only 6% of brands show user-generated visual content on product pages. 9% have behaviour-based search. 13% serve personalised recommendations on their homepage. 16% let customers filter by local inventory. 17% offer click & collect within four hours.

These are not niche features. They are the building blocks of product discovery that responds to who the customer is. Without them, every visitor sees the same homepage, the same search results, the same grid – whether they are a first-time browser or a loyal customer who abandoned a basket yesterday.

The UGC number is the most striking. Across the 373 companies in the Index, only 22 show visual UGC on product pages. Denmark sits at 1%. In a market where 49% already show customer reviews, the absence of visual social proof reveals a gap between knowing it works and deploying it where decisions are made.

THE PERSONALISATION DESERT

Across the three personalisation-adjacent touchpoints – behaviour-based search, personalised homepage recommendations, and local inventory filtering – adoption is uniformly low. 68% of brands offer none of the three. Only one brand in the entire Index offers all three.

The commercial cost is concrete. A customer searching for "lightweight summer jacket that doesn't wrinkle" on a site without semantic search gets nothing. A homepage that looks identical for every visitor gives no one a reason to believe the brand knows them. A customer checking local stock with no inventory filter will check a competitor instead.

Industry patterns confirm it. Electronics leads on personalised recommendations at 21% – deep product data and high SKU counts make recommendation engines more effective. Beauty & Pharmacy, where product selection is deeply personal, scores just 3% on behaviour-based search. The category that would benefit most from intelligent discovery is investing in it least.

For AI, the personalisation gap is also a data gap. A site with behavioural tagging, semantic product attributes, and recommendation logic is also one an AI agent can navigate and extract value from. The two investments share the same data foundation.

A LONG TAIL, A TINY ELITE

The shape of the distribution is worth looking at directly.

- *11% of companies score below 5 out of 16 - they have not yet delivered the basics.*
- *83% score between 5 and 10 - they have the mechanics and little above.*
- *Only 6% score above 10 - the genuine leaders (24 companies out of 373).*

This is not a mature market plateauing at the top. It is a market where most brands have hit table stakes and stopped, while a small elite has kept going. The commercial implication is the opposite of "everyone is similar, differentiation is open." It is: most brands are genuinely behind, and the gap to the leaders is widening.

By industry, Electronics leads at 56%, driven by deep product data and a customer base that expects to compare and filter. Department Store & Hypermarkets sit at the bottom with 41% - the broadest assortments, the most complex setups, and the lowest UX scores. Scale works against experience quality.

Even the leaders have headroom. The top three - Adidas, Verkkokauppa.com, and Elkjøp - each score 81%. No brand in the Index scored above 13. Today's implementation ceiling sits well below what's available.

WHAT THE LEADERS GET RIGHT

The top performers share a common trait: they do not just implement features, they build coherent experiences.

Adidas combines transactional UX with the experience layer: UGC on PDP, personalised recommendations, and discovery that adapts to browsing behaviour. Their pages are structured to serve both human shoppers and AI agents - clear attributes, consistent categorisation, rich media. Verkkokauppa.com leads in Electronics, the category that already tops the Index, with deep product data, 89% review adoption within the category (vs. 49% overall), and strong inventory visibility. Elkjøp has turned product data quality into a UX advantage, with local inventory visibility and click & collect execution among the strongest in the Nordics.

None of these leaders simply added more features. They invested in the connective tissue - the data layer, personalisation logic, and content structure that makes each touchpoint work harder.

DESIGNING FOR TWO AUDIENCES

The brands at 5–7 out of 16 have built transactional UX that works for checkout. They have not built experiential UX that works for discovery. As AI agents absorb more of the discovery phase, that gap will cost more every quarter.

WHERE THE BIGGEST OPPORTUNITIES LIE

Close the personalisation gap. Behaviour-based search (9%), personalised recommendations (13%), and local inventory filtering (16%) are the largest opportunity in UX today. The technology is mature, the ROI is documented – McKinsey puts the revenue uplift from personalisation at 10–15% for retailers that get it right. Start with homepage personalisation or on-site search – both have immediate commercial impact.

Treat UGC as product content, not marketing. At 6%, visual UGC is the most underdeployed asset in the UX toolkit. Customer photos and video reviews belong on the PDP, not buried in an Instagram feed. Baymard research has long shown that visual social proof on PDP reduces purchase hesitation, particularly in fashion and home categories.

Structure content for the dual audience. Every UX improvement should be evaluated through two lenses: does it help a human find the right product, and does it make your offering legible to AI agents that are increasingly part of the discovery phase? Product data quality, semantic markup, clear attributes, and content hierarchy serve both.

Invest in the data layer first. Before personalisation tools can work, retailers need clean product attributes, behavioural tagging, and consistent categorisation. The tooling is available; usable data is the actual constraint.

READY TO CLOSE THE GAP?

The data shows where the market stands. The question is where you stand within it - and what to do next. Here's how we help.

01
STRATEGIC RESEARCH & CUSTOMER JOURNEY

Understand where your experience breaks down – and why. We combine omnichannel benchmarking with hands-on UX research: user testing, journey mapping, heuristic evaluation, and customer interviews. The result is a clear picture of what's working, what's not, and where the commercial opportunity sits.

02
UX QUICK WINS - LOW EFFORT, HIGH IMPACT

We scan your site, identify the fastest opportunities to improve conversion and AI-readability, and deliver ready-to-implement design – not a recommendations deck. Real UI changes within your existing platform and design system that your team can ship immediately.

03
FUTURE-STATE EXPERIENCE VISION

Design the product discovery experience your brand needs for a world where AI agents are part of the customer journey. We help you define what your site should look, feel, and function like in 12–24 months - blending commerce strategy with agentic commerce thinking.

04
VISUAL DESIGN & DESIGN SYSTEM

Turn strategy into pixels. We build or evolve your design system so that every UX improvement - from personalised components to AI-optimised content structures - is consistent, scalable, and ready for your development team to implement.

If you're wondering whether your UX is keeping up - or holding you back - Mey is the person to talk to.

Catch her at mey.nenadic@impactcommerce.com

The brand that knows me.

How CRM data builds (or breaks) the feeling of being recognised – and where the real commercial opportunity lies.

Insights by:
Kenni Wiltoft Rostgaard
Senior Manager, Customer Loyalty
IMPACT Commerce

There is a feeling that every brand is chasing, and few consistently deliver.

You probably recognise it yourself. The app that surfaces something you didn't know you needed. The email that arrives so well-timed it feels less like marketing and more like a friend who pays attention. The associate in-store who knows your size, your preferences, your last visit – and makes you feel like a person, not a transaction.

That feeling is not built in a single moment. It accumulates over time, through repeated micro-interactions where the experience feels tailored rather than templated. And the bar for what "knowing me" means keeps rising.

Customers no longer benchmark that feeling within your category. Spotify's recommendations, Uber's frictionless payments, and Amazon's anticipatory logistics shape expectations across industries. Loyalty forms less through rational evaluation and more through emotions, habits and exceeded experience.

"Using CRM and loyalty data to understand customer needs and pain points enable us to create services that make both physical and digital experiences as smooth, enjoyable, and premium as possible."

Samuel Holst
Global Head of Online
Marketing & Loyalty
Gant

A MARKET THAT CAPTURES, BUT DOESN'T ACTIVATE

CRM is no longer an emerging capability. Average adoption across countries and industries sits at 37%, and data collection is widespread. 77% of brands capture customer data at checkout, and 59% support in-store sign-up. But collection without activation is not relationship-building. It is data storage.

The activation numbers expose the gap plainly. Only 27% of brands use behaviour-based automated communication. Behaviour-based search appears in just 9% of cases, and personalised product recommendations in 13%. This is the activation gap. And it represents one of the most significant commercial opportunities in CRM today.

CAPTURING DATA	VERSUS	ACTIVATING DATA
77% *capture customer data at checkout.*		**27%** *use behaviour-based automated communication.*
59% *support in-store sign-up.*		**13%** *show personalised product recommendations.*

CUSTOMER LIFETIME VALUE IS LEFT ON THE TABLE

Discount-driven engagement doesn't build loyalty, it rents it. The customer returns for the next offer, not because of a relationship. The issue isn't incentives themselves – it's when they lack relevance or meaning. When rewards are shaped around individual context, intent, and preferences, they start to build something deeper. BCG found that highly personalised experiences drive 110% more purchases and 40% higher spending (BCG, 2019).

At Søstrene Grene, contextual AI now turns abandoned searches into personalised emails in the brand's own voice, re-engaging shoppers at the right time across 15+ markets. Despite the clear value, behavioural triggers are used by just 27% of brands and retailers in the index – only a marginal increase from 2024.

What makes this particularly frustrating is that customers are willing to meet brands halfway. 56% of consumers say they are open to sharing more personal data in exchange for a better experience (Oliver Wyman, 2024). The willingness is there – what's missing is the value exchange that unlocks it.

If you give customers a genuine reason to share their data, through recognition, access, and experiences that feel worth it, the rest follows. From the customer's perspective, the logic is simple: "I shared something, the experience improved, so I shared more, and it improved again."

For brands and retailers, the impact is just as clear. More data enables sharper personalisation, which makes every interaction more relevant and valuable, with AI helping scale that relevance without losing the human touch. The result is deeper relationships that grow CLV in a way no discount programme ever could.

WHERE THE JOURNEY BREAKS DOWN

The structural problem isn't just that data is under-activated. It's that the gaps show up exactly where they hurt most – and the customer experiences the journey as a whole, not phase by phase.

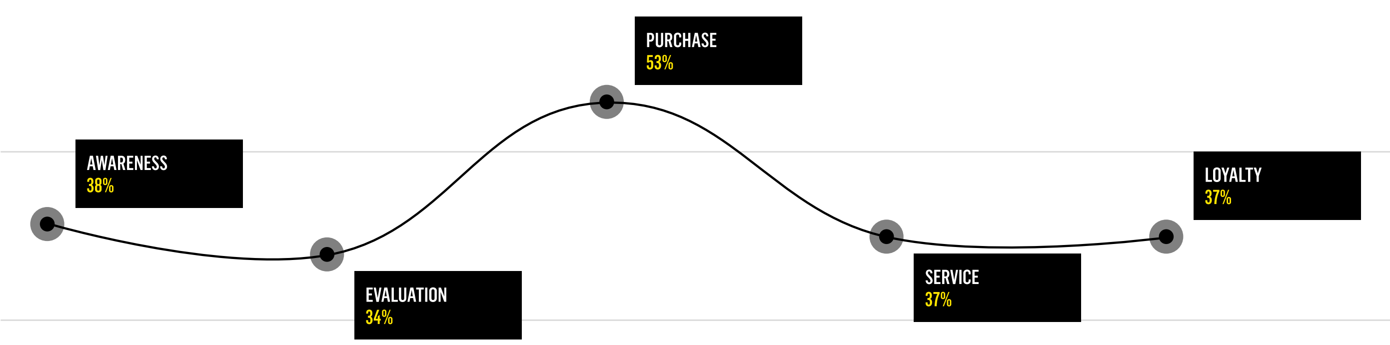
Evaluation, at 34%, is the weakest phase in the entire journey. Just 9% use behaviour-based search and only 13% show personalised recommendations. The moment where CRM data could prove the brand already understands the customer is instead the most generic.

Service, at 37%, tells the same story from the other side. A first-time buyer and a ten-year loyalty member receive the same response. That doesn't just miss a personalisation opportunity – it actively erodes the "brand knows me" feeling that CRM is supposed to build.

Now consider what the customer actually experiences. They may get a personalised loyalty email and a well-executed checkout, but the moment they browse for something new, the brand forgets them. The moment they need help, it forgets them again.

This is where the psychology matters. Loyalty doesn't form from the average of all interactions. It forms from the highs and the resolution – the peak-end rule. And the variation between peaks and valleys matters as much as the lows themselves. A beautifully personalised email followed by a generic evaluation experience doesn't just fail to impress. The contrast undermines the very feeling the email created.

For the "brand knows me" feeling to hold, the experience needs a coherent thread of recognition. When Evaluation and Service sit 20 points below Purchase and Loyalty, that thread is severed. The journey doesn't just have gaps. It has contradictions.



FOUR MOVES THAT CLOSE THE GAP

01
PUSH CRM UPSTREAM

Move customer data out of the 'loyalty silo'. Enrich ad platforms, personalise product discovery, recognise customers at purchase, and differentiate service. The technology exists, but the connection is missing.

02
TREAT STORES AS A CRM ASSET

88% of Belgian brands nudge sign-up in-store, which challenges the assumption that CRM is a digital-first discipline. Store staff, receipts, fitting rooms, events, loyalty card scans, and in-store interactions are rich capture points that many brands have underinvested in.

03
SHIFT INVESTMENT FROM ACQUISITION TO RELATIONSHIP

Most CRM spend goes into the 'join' loop: sign-up forms, checkout nudges, welcome offers. But CLV compounds in the middle, in the 'stay and share' loops where continuous relevance makes the relationship worth maintaining and worth talking about. Use the data you already have to trigger the next action: follow up with relevant products, re-engage at the right moment, and recognise high-value customers in ways that reflect what you know. Consumers who receive personalised experiences spend up to 50% more (Deloitte, 2024). And with media costs rising and CAC increasing, growth comes from getting more value out of the customers you already have, not just acquiring new ones.

04
REBALANCE THE VALUE EXCHANGE

The gap between monetary and emotional value (77% vs. 20%) shows that most brands are operating with a one-dimensional exchange. Discounts are effective at driving sign-ups, but they rarely build relationships. If you want customers to share data and stay engaged, the exchange has to feel worth it. Recognition, early access, personalised service, and better experiences give customers a reason to come back – not just a reason to buy once.

CURIOUS HOW YOUR CRM COMMUNICATION ACTUALLY MEASURES UP?

The data in this article tells the infrastructure story – what's being captured, activated, and missed. But there's another dimension that matters just as much: what does your actual communication say to customers?

At IMPACT Commerce, we've created a proprietary database that covers 10,000+ brand emails across Nordic and Benelux markets, scored across persuasion dimensions. It shows not just whether brands communicate, but the balance between promotional and relational messaging – and how sophisticated their lifecycle automation actually is.

If you want to know whether your communication lives up to your brand promise – or explore how CRM and customer data can fuel a more connected journey across channels – Kenni is your guy.

Catch him at kwr@impactcommerce.com.

The basics are in place. The experience isn't.

How the gap between digital ambition and physical reality is becoming the defining challenge of omnichannel retail.

Insights by:
Anders Wedendahl
Unified Commerce Specialist
IMPACT Commerce

Customer service and in-store support are where omnichannel either works – or breaks down. It's the moment a customer walks into a store and expects the same experience they had online: the same information, the same flexibility, the same level of service.

When that expectation is met, physical retail becomes a real competitive advantage. When it isn't, the store quickly feels disconnected and outdated. Right now, most brands are still missing that mark.

The data reveals a discipline in two halves. A small group of organisations have invested seriously in connecting their physical and digital service layers. The majority have not. With an average pass rate of just 31%, Customer Service & In-Store Support is the second lowest-scoring discipline in the entire Index, ahead only of AI.

The divide is stark: 121 out of 372 assessed companies score below 20% in this discipline. Just 17 companies score above 60%. The middle ground is thin. It is a story of a small group pulling ahead while most of the market stands still.

WHAT THE LEADERS ARE GETTING RIGHT

The leading brands within this discipline – Sport24, Matas, and IKEA – share one characteristic: they treat the physical store as a key competitive advantage in a connected digital experience, not as a separate channel with its own rules.

That philosophy shows up across every layer of the maturity model. Staff can access customer context and order history. They can place and fulfil online orders from the shop floor. Digital services are actively promoted in-store. And fulfilment is flexible, fast, and operationally embedded – not layered on top.

Sport24 and Matas both reach 82%, combining strong in-store execution with capabilities like same-day delivery – something fewer than 7% of organisations offer. IKEA Belgium matches that score, with consistent investment in QR-enabled product information, assisted ordering, and integrated fulfilment models like click-and-collect and ship-from-store.

WHAT'S WORKING

55% of companies can surface omnichannel order history on a customer's in-store profile. This is the highest-scoring capability in the discipline and a genuinely valuable one: when a staff member can see a customer's full purchase history – online and offline – they can serve them more accurately, resolve issues faster, and identify upsell opportunities. The fact that more than half of assessed organisations have this in place is encouraging. But it also means nearly half are operating blind.

52% of companies allow staff to place an online order and ship it to the customer's home or to another store. When a product is out of stock in-store, the ability to order it on the spot – rather than sending a customer away – is both a service feature and a commercial one. Research suggests stores are missing out on between 5% and up to 30% additional revenue by not offering this capability. For retailers already partway there, expanding this capability represents one of the clearest near-term opportunities in the discipline.

WHAT'S NOT

Only 9% provide digital support outside of store opening hours. Customers don't stop having questions when the shop closes – yet fewer than one in ten offer any form of support in the evenings or at weekends, whether through an AI-assisted chatbot, async messaging or extended email coverage. The required tools are widely available and relatively easy to implement. This makes it clear that the barrier is not technology, but prioritisation – leaving a significant share of customer interactions unsupported at critical moments.

Only 5% have implemented Mobile POS. The fixed checkout is one of the last remaining structural barriers between in-store retail and the seamless experience customers expect. Mobile POS – allowing a staff member to complete a transaction anywhere on the shop floor – eliminates queues, enables high-touch service moments, and signals genuine operational investment in store experience.

57% of assessed organisations take more than four hours to respond to email enquiries. In isolation that might seem like a minor operational detail – ***but 77%*** of consumers say that valuing their time is the most important thing a company can do to provide good service (Forrester Research). Response time is one of the most direct signals a brand sends about how much it values its customers. And unlike many of the capabilities in this discipline, improving it doesn't require a technology investment. It's a process decision – and increasingly, an AI one. In a market where most brands are still slow, being fast is a meaningful and accessible way to stand out.

MARKET AND CATEGORY CONTEXT

Belgium leads the six assessed markets at 37%, driven largely by IKEA Belgium's strong performance. The Netherlands sits at 24.0% – the lowest of all assessed markets. For organisations operating there, that gap is as much an opportunity as a challenge. The baseline is low enough that relatively modest investment in in-store digital capability could yield significant competitive differentiation.

At category level, Electronics leads with a 45% average pass rate. High-consideration purchases, where customers need expert advice, flexible fulfilment and post-purchase support, appear to be driving greater omnichannel service investment in this sector.

Beauty and Pharmacy at 23% and Jewellery and Watches at 21% have the most ground to cover – and arguably the most to gain. Both are characterised by considered, personal decisions where expert advice, tailored service and post-purchase support matter enormously, making it a siginifcant service-gap. For the brands that close it, the loyalty upside is equally significant.

WHAT SHOULD YOU DO NEXT?

The question for any senior leader with physical retail in their portfolio is straightforward: when a customer walks into one of your stores, do your staff have the tools, information, and authority to deliver the same quality of experience that customer would expect online?

For most organisations assessed in this Index, the honest answer is no. To solve this gap, start by getting these three areas in order:

01
ORDER HISTORY VISIBILITY

Make sure in-store staff can access a customer's complete purchase history – online and offline – in real time. It's the foundation for relevant, personalised service at the point of contact.

02
AFTER-HOURS SUPPORT

Ensure someone or something is handling customer service queries after your stores close. AI-assisted chat and async messaging are widely available and relatively straightforward to deploy.

03
DIGITAL CHANNEL INTEGRATION

Actively connect your in-store experience to your digital channels. Promote them in-store, make them easy to access, and make sure the two feel like one experience rather than two separate operations.

The more ambitious capabilities – Mobile POS, ship-from-store, in-store customer engagement activities – follow once those foundations are in place. The organisations moving into those areas now are building advantages that are genuinely difficult for competitors to replicate quickly.

The physical store remains one of retail's strongest assets. The opportunity is to make it connected. If you want to understand where your store experience is falling short – and what it takes to close the gap – Anders is the right person to speak to.

Catch him at anw@impactcommerce.com

Retail marketing is built on rented ground.

Why owned audiences are the most underdeveloped asset in retail marketing - and why that gap is about to get expensive

Insights by:
William Mørch
Strategy & Growth Lead
IMPACT Commerce

Paid media prices are rising. Organic reach is declining. Privacy regulations are tightening. The economics of renting attention – on social platforms, in search, across display networks – are getting worse every year. And yet the dominant digital marketing strategy across European retail is still built almost entirely on rented reach.

Here is the clearest way to see the problem. 92% of retailers are active on visual social platforms. 76% post consistently. The top of the funnel is busy.

At the same time, only 18% of retailers run mid-funnel ads with a lead generation or sign-up focus – fewer than 1 in 5 retailers actively using paid media to grow the channels they'd actually own.

BRAND SEARCH IS THE REVEALING NUMBER

Only 10% of retailers grew brand searches by 10% or more in the past year. For many brands, that's a high bar and not necessarily the only measure of success.

Still, brand search remains a useful signal. When marketing is working – when people are genuinely connecting with your brand – branded search should go up. For 90% of retailers in the index, it hasn't.

This points to a broader pattern: budgets are flowing into paid reach on platforms brands don't control, with less focus on building lasting demand. You can be visible everywhere and still struggle to build something that sticks.

WHY THIS MATTERS MORE NOW THAN EVER

Owned audiences have always mattered. What's changed is the stakes.

AI-driven personalisation is the competitive baseline – and it runs on first-party data. The differentiating tools, such as individually tailored content, predictive recommendations, dynamic campaigns, are only as good as the audience data behind them.

With smart use of AI to increase operational efficiency, retailers who have spent years building clean, consented customer knowledge will be able to put those tools to immediate use at a pace that would have been unimaginable two years ago.

Meanwhile, GDPR rules are tightening and AI-powered search is reshaping discovery. The brands that show up in AI-generated answers are likely the ones with strong brand signals, good reviews, transparent returns/exchange conditions, content that gets referenced, solid site structures and good product information. Part of that is built through exactly the kind of investment most retailers are currently skipping.

In other words: The window for building owned audiences on your own terms is open – but the conditions are getting less favourable, not more.

TWO NOTABLE GAPS

Two specific areas illustrate what happens when investment goes in without the right strategic logic behind it.

TIKTOK PRESENCE WITHOUT PAYOFF

On TikTok, 44% of retailers post twice a week or more. Only 18% see meaningful audience engagement back. That is a significant mismatch between effort and return. The problem is almost certainly not frequency. With AI reducing content production time dramatically, volume has become easy for everyone. What is harder – and what increasingly determines success on the platform – is authenticity. Human feeling. Content that sounds like a person rather than a publishing schedule. The retailers getting genuine traction are the ones investing in voice, not just output.

MISSED CONNECTION BETWEEN ONLINE AND IN-STORE

Google Local Inventory Ads tell a different story – one about infrastructure rather than content. These ads show a customer exactly which store has the product they're searching for in stock. A direct, high-intent link between an online moment and a physical sale. Adoption sits at just 28%. That almost certainly reflects gaps in stock data quality and inventory visibility rather than strategic oversight – you cannot run a Local Inventory Ad if your stock data isn't clean enough to trust.

The Electronics industry leads here at 60.7%, which makes sense: large electronics retailers have had to manage high-S KU, multi-brand inventory for years. The infrastructure exists because it had to. Most other categories haven't been forced to build it yet. For any retailer with physical stores, it's one of the most underleveraged tools in the discipline.

THE RETAIL MEDIA PARADOX

It's worth noting that many of the multibrand retailers in this study, particularly in Electronics, Department Stores, and Beauty operate retail media networks, selling ad inventory to the brands they stock. That's a meaningful revenue stream, but it doesn't appear to translate into stronger digital marketing performance.

Multibrand retailers average 41.0% on digital marketing overall, compared to 49.2% for brands.

The industries with the most established retail media setups sit in the middle of the rankings, not at the top. That's not necessarily a problem. Retail media and owned audience building serve different goals. But it's a reminder that monetising your digital shelf is not the same as investing in the customers browsing it.

THE BRANDS INVESTING ACROSS THE FULL FUNNEL ARE THE REAL WINNERS

The top performers span categories and markets – there is no single industry or brand type that dominates. What they share is consistency. Consistent presence across channels. Consistent investment across the full funnel, not just the bottom where results are easiest to attribute. And consistent effort to build audiences, not just reach them.

That consistency is rarer than it sounds. It requires treating digital marketing as a long-term asset-building exercise rather than a quarter-by-quarter performance problem. The leaders appear to have made that shift. Most of the market hasn't.

THREE THINGS WORTH ACTING ON

01

TREAT OWNED AUDIENCE GROWTH AS A PERFORMANCE METRIC.

Set targets for email list growth, loyalty signups and app downloads alongside conversion KPIs. Mid-funnel investment in audience building belongs in the same planning conversation as lower-funnel performance spend.

02

TRACK BRAND SEARCH AS A LEADING INDICATOR.

If it's flat, your marketing is buying transactions but not building equity – and no amount of media efficiency closes that gap.

03

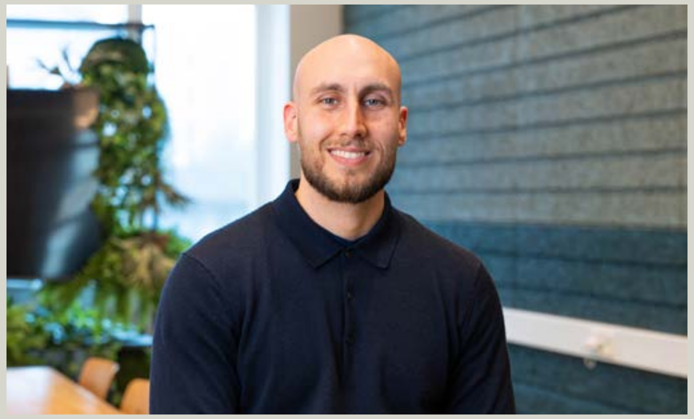
INVEST IN THE DATA INFRASTRUCTURE FIRST.

Make sure you have clean stock data, consented first-party data, and accurate product information. These are what make Local Inventory Ads, AI personalisation and dynamic campaigns actually work. The tools are available to everyone. What you're feeding them is the real differentiator.

Are you clear on where your biggest digital marketing gaps are – and how to close them?

This report highlights where retailers are falling behind. William can help you turn those insights into action, from identifying your biggest opportunities to building a more effective, owned audience strategy.

Get in touch at wm@impactcommerce.com.



The omnichannel acquisition engine.

Why your store network is one of your most underutilised performance marketing assets – and how to change that.

Insights by:
Torje Ingebretsen
Omnichannel Retail Specialist
Google

Omnichannel shoppers have an average of 73% higher spend than non-omnichannel shoppers (Google/Kantar), and 68% of European consumers are channel agnostic, meaning they move freely between online and offline rather than committing to one (Google). That reality requires a convenient, frictionless experience, regardless of where they are in their journey.

Yet, the 2026 Omnichannel Index shows that most retailers are still running their digital marketing as if the store doesn't exist. Not because the opportunity is hidden, but because the organisational structures, incentives, and data foundations needed to capture it haven't been built.

YOUR STORES ARE WORTH MORE THAN YOUR E-COM NUMBERS SHOW

I've spent 15 years at Google working in performance marketing, focused on large omni-retailers across Northern Europe. That means I sit at a unique intersection: I see how consumers search, how ads perform, and how those digital touchpoints connect to physical store sales.

One finding consistently surprises retailers when they first see it: Google as a channel influences more in-store revenue than it does e-commerce.

The intent is there. Consumers research digitally, then buy in-store. They check stock online before making the trip. They use Google to find what's nearest, available, and worth visiting. In fact, 77% of consumers say they feel more confident in their purchase once they've done research (Google/Ipsos). Yet, only 28% of retailers use Google Inventory Shopping Ads in the Awareness phase. That means the vast majority are invisible at exactly the moment local purchase intent is highest.

The retailers who have connected these dots – building what we call an omnichannel acquisition engine across web, app, and store – are seeing a decisive competitive advantage. Their store networks become an active engine in performance marketing, and that is a structural advantage that pure e-commerce players simply cannot replicate.

THE $1.60 OPPORTUNITY

For every $1 driven in online sales, Google channels generate an average of $1.60 in attributable in-store revenue. If you only optimise for the $1 online, you are leaving the $1.60 on the table.

FIX YOUR INCENTIVE STRUCTURE FIRST

Before any omnichannel marketing solution can work, internal teams need to be aligned around the right goal. I see this disconnect constantly: C-level leadership is measured on total sales across all channels, while digital marketing teams are measured on e-commerce revenue only. The KPIs never meet and the store gets left out of the performance equation entirely.

The index reflects this. The Purchase phase scores 53% – the highest of all five phases – because online purchase mechanics are broadly mature. Yet in-store purchase innovation remains very limited: Mobile POS is available in only 5% of stores, and cross-device basket persistence is absent in most. These are not technology problems. They are incentive problems. Nobody is being rewarded for solving them.

The fix is straightforward: define a single total sales KPI covering web, app, and store, eliminate internal competition between digital and physical, and ensure your agency is optimising to the same goal – not just e-commerce ROAS. Retailers who adopt omnichannel bidding see +18% in conversion value at a similar cost (Google). That's what aligned incentives unlock.

START FEEDING OFFLINE SIGNALS INTO YOUR CAMPAIGNS

Once incentives are aligned, the next step is to make sure your campaigns are fully capitalising on local purchase intent. Google can track store visits that follow ad clicks – without the retailer sharing any proprietary data. You simply assign a value to what a store visit is worth to your business, and that signal feeds directly into campaign optimisation.

More importantly, connecting your point-of-sale data to Google Ads means that actual in-store transactions flow back into your bidding strategy in real time. Your campaigns stop optimising for the $1 online and start optimising for the full $2.60.

It sounds basic – and it is. But a large number of retailers, including major ones, are still not using it. Only 5% offer Mobile POS in stores; even fewer are feeding those physical touchpoints back into digital optimisation. This is probably one of the lowest hanging fruits in performance marketing today.

AUTOMATION IS TABLE STAKES – DATA IS THE DIFFERENTIATOR

Machine learning and automation have fundamentally changed performance marketing. Manual, granular campaign management is no longer a path to growth. The AI optimises better, faster, and at a scale no team can match. That part is settled.

The real competitive question is: what data are you fuelling it with?

The retailer with richer first-party data wins more relevant impressions at better prices. Two data sources are critical:

01

CRM AND CUSTOMER TRANSACTION DATA

Connecting loyalty and CRM data to campaigns means store sales feed directly into bid optimisation – a compounding advantage with every transaction. The catch: many retailers sit on large loyalty databases they legally cannot activate because consent infrastructure wasn't built in from the start. Fix that first.

02

STOCK AND FULFILMENT DATA

Local inventory, real-time availability, click-and-collect. These connect your ads to physical reality at the moment a consumer is deciding where to buy, letting you surface Pickup Today and Pickup Later options before a competitor does. Retailers who run Local Inventory Ads alongside Shopping ads see a 21% increase in store visits and a 9% increase in online conversions for products available in-store (Google).

Leading retailers take this one step further: a cross-channel attribution model spanning all digital channels, giving the CMO and digital teams a single source of truth for budget allocation. Decisions grounded in total sales, not channel-level ROAS. That alignment is rarer than it should be – and it's exactly what separates retailers growing the top line from those optimising in circles.

THE CHECKLIST:

WHAT TO PRIORITISE NEXT

- ✓ Align incentive structures to total sales – from C-suite to digital team to agency.
- ✓ Feed store visit signals into campaign bidding (no data sharing required to start). Add a store visits value that is realistic.
- ✓ Connect inventory & fulfilment data (local stock and click-and-collect) and activate Local Inventory Ads to capture local intent and drive store visits.
- ✓ Build your consent infrastructure into loyalty so that dynamic store sales data can be integrated legally and activated in real time.
- ✓ Activate omni ROAS optimisation within our AI-powered formats. Feed it all with rich and structured product data.
- ✓ Establish a cross-channel attribution model as a strategic compass for budget allocation across all channels.

Web performance is a leadership problem.

The gap between basic fulfilment and best-in-class is wider than most retail leaders realise.

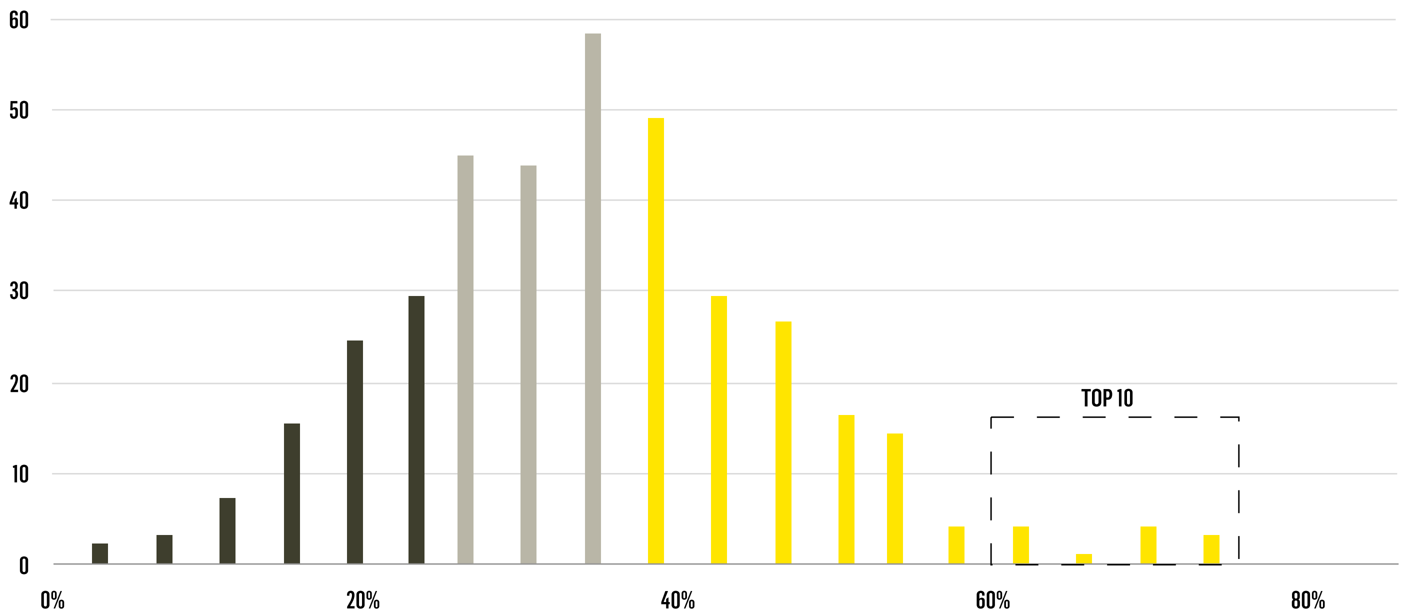
Insights by:
Stephan Hjelmdal
Director, Quality Intelligence
IMPACT Commerce

Web performance across the Nordics and Benelux is improving. More retailers are passing Core Web Vitals, mobile experiences are becoming faster, and the underlying technology has never been stronger.

But that progress is not telling the full story.

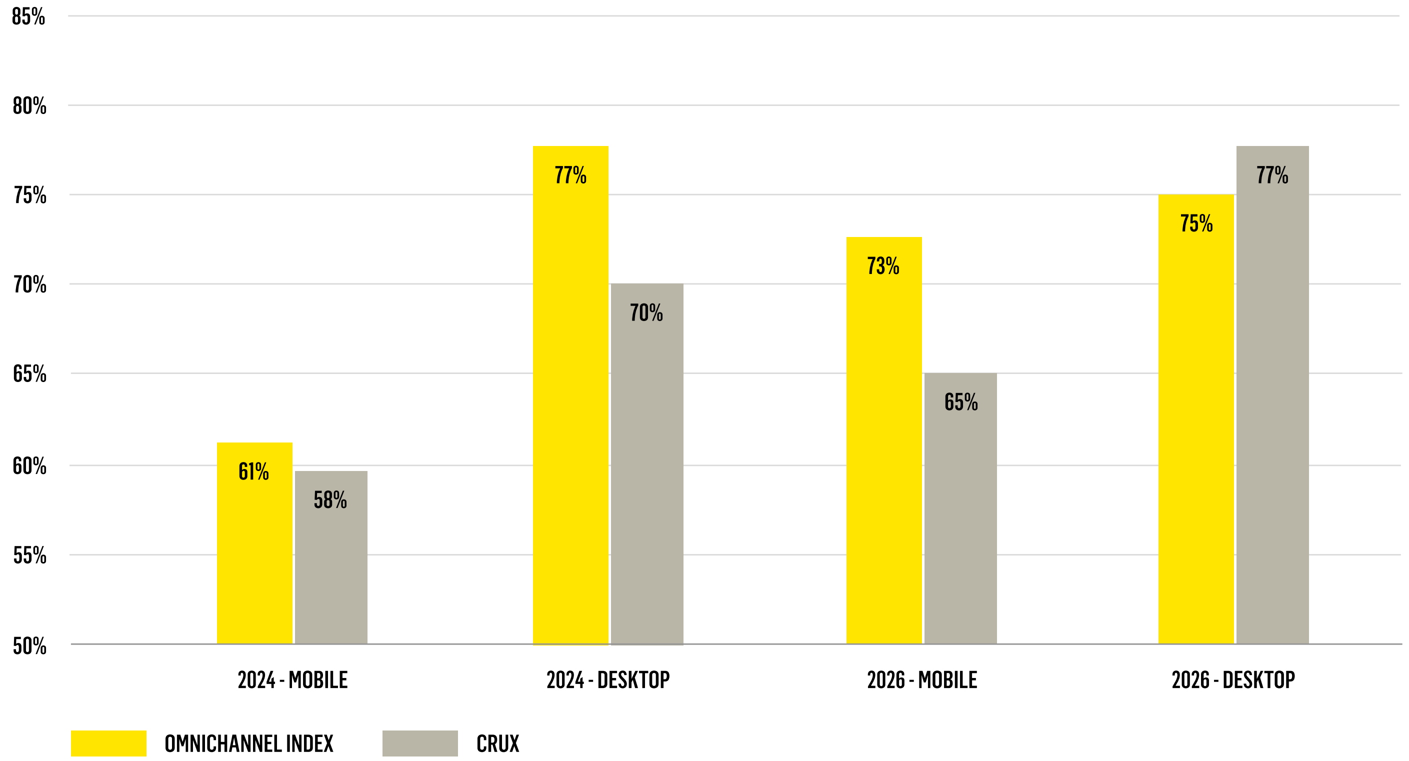
Because when you look beyond the headline numbers, a different pattern emerges. Gains are uneven, desktop performance is stagnating, and much of the improvement is being driven by external factors like faster devices and better browsers, not by stronger execution.

For years, performance has been treated as a technical challenge. Today, that assumption is outdated. The real constraint is no longer capability, but prioritisation – and the brands that recognise this are starting to pull ahead.



Pass rate buckets (1% intervals)

THE ILLUSION OF PROGRESS



At first glance, the data looks encouraging. Mobile performance has improved significantly, with a +12 percentage point uplift in perceived loading speed since 2024. Accessibility scores have more than doubled, and more brands are meeting Core Web Vitals thresholds.

On the surface, this looks like clear progress.

However, these improvements need to be understood in context. Over the same period, mobile devices have gained an estimated 20–40% increase in processing power, and 5G adoption has surged from 32.8% to 44.5% in just one year. Browser engines have become more efficient, and platform-level optimisations continue to raise the performance baseline across the web.

This helps explain why mobile experiences are improving. It does not explain why desktop performance is declining.

Desktop environments already benefit from high processing power and stable connections, meaning they rely far less on external improvements. When performance drops here, it points to issues within the implementation itself.

The broader benchmark reinforces this. Chrome UX data shows that a population of more than 19 million origins – including low-budget sites with minimal optimisation – is outperforming the Index on desktop loading experience.

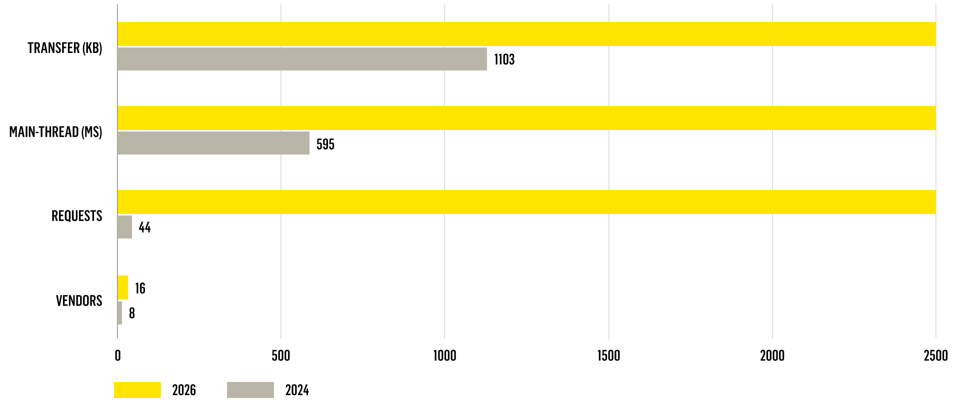
At the same time, then numbers also reveal that more than 30% of users across the Index still encounter performance-related friction during their shopping journey. Given the well-established impact of delays on conversion, this translates directly into lost revenue.

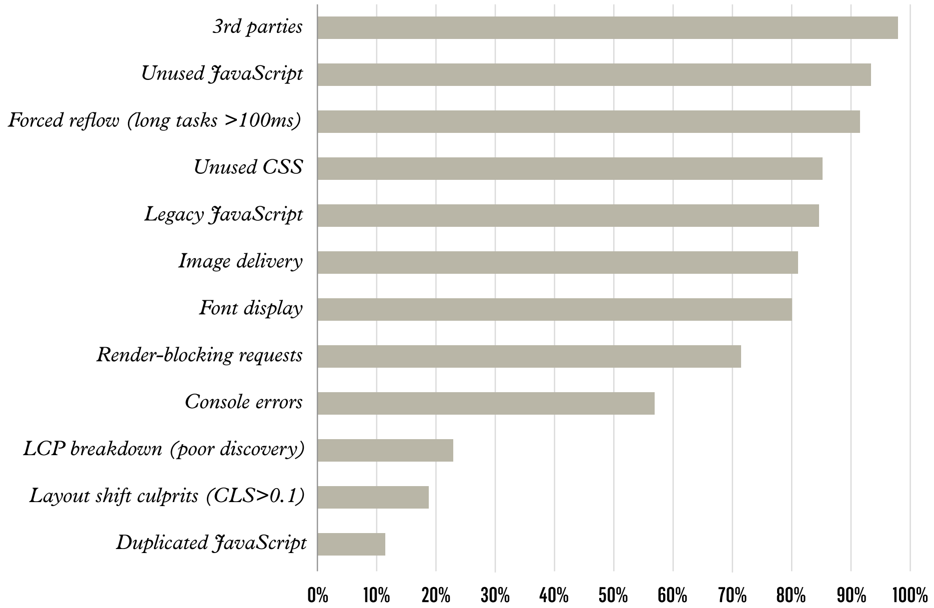
Taken together, this suggests that much of the observed improvement is not driven by better execution, but by a more forgiving environment. The result is an illusion of progress.

THE OPTIMISATION GAP

The decline in desktop performance is not caused by a single issue, but by the accumulation of complexity.

Since 2024, the average use of third-party scripts has nearly doubled, both in terms of requests and total data transferred. While some of this growth reflects an increased focus on personalisation and customer insight, the overall impact is significant.





These are well-known issues, and they remain largely unchanged from previous years. What has changed is the volume.

This is where the structural difference between mobile and desktop becomes important. Mobile experiences are naturally constrained – fewer elements, simpler layouts, and a stronger link to conversion. Desktop environments, by contrast, tend to accumulate features, integrations, and experimentation. As complexity increases, so does the performance cost.

Still, the technical foundation seems to be the lacking piece of the puzzle. Though we have all imaginable tools and knowledge available, we still see staggering 6% showing great technical abilities on the synthetic tests across desktop. The root causes? Huge javascript bundles, poor page compositions and loads of third-party scripts flooding the sites.

THE AI PARADOX

AI has fundamentally changed how digital products are built. Teams are shipping faster, releasing more frequently, and accelerating experimentation across every part of the commerce stack. But why has performance not followed?

The reason is simple. AI accelerates execution - but performance depends on discipline. It requires restraint in how much is loaded, control over third-party integrations, and deliberate architectural decisions. These are not problems AI solves.
In fact, the opposite is often true. Faster development cycles lead to more features, more scripts, and more complexity - added at a pace that outstrips optimisation.

We're building more, faster - but not necessarily better. And while we are busy re-shaping our workflows with autonomy across the development lifecycle, the technical quality might drop gradually. This is a common pitfall when limiting human intervention for quality assurance if we don't account for it specifically. Now is really the right time to close the technical gap.

THE LEADER'S DIFFERENTIATION

The top performers in this year's index stand apart - not because they have access to better tools, but because they make different decisions.

They prioritise performance at a strategic level. They limit unnecessary complexity. They challenge the addition of third-party scripts and features that do not directly contribute to business outcomes.

They measure what matters, using real user data, not just synthetic scores – and they treat performance as a continuous discipline, not a one-off optimisation effort.

Most importantly, they assign ownership. Performance is not left to chance or buried within technical teams, it is governed.

FINAL REMARKS

The future is already here. The pace of innovation in digital commerce is accelerating faster than at any point in recent years, and with AI, software development is moving at a completely different speed.

But priorities have not evolved at the same pace. The question many organisations still ask is: how do we deliver more features within the same budget? Far fewer are asking how to build better, faster, and more reliable experiences with fewer defects and less friction.

We already know that even small delays – measured in milliseconds – can drive double-digit changes in conversion. Yet the technical foundation required to support that performance remains underinvested.

That is what makes this such a clear opportunity. While most brands continue to rely on external improvements to carry performance forward, a small group of leaders are actively taking control – and seeing the commercial impact.

Performance is no longer a technical constraint. It is a leadership decision.

Curious where your performance gaps actually are – and what they're costing you?

Stephan works hands-on with brands to identify bottlenecks, prioritise the right fixes, and turn performance into measurable business impact.

Reach out at shn@impactcommerce.com to start the conversation.

Strong foundations. A same-day cliff edge.

The gap between basic fulfilment and best-in-class is wider than most retail leaders realise.

Insights by:
Anders Wedendahl
Unified Commerce Specialist
IMPACT Commerce

Stock Data and Fulfilment used to be a back-office function. Today, it is a front-line competitive variable. Consumers make purchase decisions based not just on what is available, but on when and how they can get it – and the bar keeps rising.

The 2026 Index shows a discipline that, on the surface, performs well. Stock data & fulfilment ranks highest across all nine disciplines, with an average score of 43%.

The foundations are largely in place. Many retailers have built the core capabilities required to support omnichannel journeys. But while the baseline is strong, the next layer of fulfilment maturity is far less developed.

HIGHLIGHTS

73% OFFER ONLINE PURCHASING WITH IN-STORE RETURNS.

Near-universal adoption of buy online, return in-store (BORIS) reflects how seriously most retailers have responded to post-purchase expectations. A well-executed return is one of the few moments that brings an online customer back into the store – and the majority have now built the infrastructure to make it happen.

69% OF COMPANIES SHOW LOCAL STORE INVENTORY ON THE PRODUCT DETAIL PAGE.

Real-time stock visibility at the nearest store is one of the most direct levers for driving omnichannel footfall. When a customer sees that a product is available locally, the likelihood of a store visit increases significantly. The fact that nearly seven in ten assessed organisations surface this data is a meaningful step forward – though it also means that more than three in ten are still not leveraging their physical inventory as a digital conversion tool.

AREAS WITH ROOM FOR IMPROVEMENT

ONLY 7% OFFER SAME-DAY DELIVERY IN HIGH POPULATION CITIES.

As customer expectations continue to rise, same-day delivery is becoming an important competitive lever, yet adoption remains extremely low. With 93% of retailers still not offering it, most are not equipped to meet demand for immediacy. The gap is particularly pronounced in Sweden, Finland, and the Netherlands, where it is almost entirely absent.

17% OFFER CLICK AND COLLECT OR RESERVE WITHIN FOUR HOURS ON THE PRODUCT DETAIL PAGE (PDP).

The most commercially significant gap in the discipline. Four-hour collection converts high-intent browse behaviour into same-day decisions – exactly the moment where retailers risk losing a customer to a competitor who can move faster. Most retailers have the physical infrastructure to offer this; what's missing is the operational connection.

THE GAP BETWEEN LEADERS AND THE REST

The most important divide in this discipline is not between those who have invested in fulfilment and those who have not. It is between how they have invested.

Most retailers have invested in fulfilment as a service layer including returns, availability, basic convenience. They have not yet invested in fulfilment as a speed layer – and there is a meaningful difference between the two.

A service layer satisfies customers who have already decided to buy. A speed layer wins customers at the moment of decision – the high-intent shopper who wants it now and will go to whoever can deliver first.

Three other touchpoints sit in the middle of this gap and deserve attention.

- 59% communicate click and collect on the product detail page – meaning a share of retailers are offering the capability but not surfacing it where purchase decisions are actually made.
- Only 28% connect inventory to Google Local Inventory Ads, leaving the majority running digital marketing without activating one of its most powerful local signals.
- Just 16% allow customers to filter by local store availability – a basic feature for any customer who wants to buy today rather than wait.

WHAT THE TOP PERFORMERS ARE GETTING RIGHT

bahne

100%

Bahne, Danish home and lifestyle retailer, delivers a fully connected fulfilment experience across the entire journey. Customers can see and filter local store inventory, reserve within four hours, choose click-and-collect, and access same-day delivery. Crucially, these capabilities are not isolated – they are activated across both onsite experience and external channels through Google Local Inventory Ads. The result is a fulfilment setup that drives both conversion and convenience.

SILVAN

100%

Silvan, one of Denmark's leading DIY retailers, operates in a category where immediacy is critical – customers buying materials for a renovation project cannot wait days for delivery and need precise visibility into what is in stock nearby. Its fulfilment setup ensures customers can access accurate local availability, act on it quickly through ROPIS (reserve online, pick up in store), and receive products the same day when needed. By combining real-time inventory visibility, fast fulfilment options, and activation across channels, silvan is well positioned to capture high-intent demand.

VERKKOKAUPPA.COM

100%

Verkkokauppa.com, Finland's leading electronics retailer, achieves a perfect score through a fulfilment setup that delivers consistently across every assessed capability. In a category where availability and speed are key purchase drivers, it ensures customers can access accurate stock information, act on it immediately, and receive products without delay. From real-time inventory visibility and seamless returns to same-day delivery and fully integrated omnichannel touchpoints, its approach reflects a high level of operational maturity.

5 STRATEGIC TAKEAWAYS

01

SAME-DAY DELIVERY IS THE NEXT MAJOR FULFILMENT BATTLEGROUND – AND MOST RETAILERS ARE UNPREPARED.

Only 7% currently offer it, yet Statista projects the same-day delivery market in europe to grow at double-digit rates annually through 2028. The retailers with urban store footprints already hold the distribution infrastructure. The constraint is operational: inventory accuracy, carrier integration, and the process design to pick and dispatch in under two hours. Building this capability now is a first-mover advantage in most of the assessed markets.

02

STORE INVENTORY IS AN UNDERUSED FULFILMENT ASSET.

Most organisations displaying local inventory on a PDP are using it passively, informing customers who are already considering a visit. The more powerful application is active: routing online orders to nearby stores for fulfilment, enabling ship-from-store as a default for out-of-warehouse scenarios, and using real-time stock signals to drive local marketing. Very few are doing this today, and it represents one of the clearest untapped opportunities in this discipline.

03

MULTIBRAND RETAILERS SIGNIFICANTLY OUTPERFORM BRANDS IN THIS DISCIPLINE (48% VS. 34%).

This is a notable reversal of the pattern seen in many other index disciplines, where brand retailers often lead. It likely reflects multibrand retailers' longer history of managing complex physical stock and returns across large store networks. For brand retailers, this gap is a clear signal: fulfilment infrastructure investment has not kept pace with the brand's broader digital ambition.

04

DENMARK IS THE FULFILMENT LEADER AMONG THE NORDIC MARKETS.

With 12 of the 26 same-day delivery providers in the assessed sample, Denmark is ahead of every other market in the most advanced capability in this discipline. Danish retailers including Bahne, Silvan, Sport24, Matas, and IKEA Denmark are setting a standard that their counterparts in sweden, norway, and finland are yet to match at scale.

05

BUY ONLINE, RETURN IN-STORE (BORIS) IS A BASELINE, NOT A DIFFERENTIATOR.

At 73% adoption, in-store returns for online purchases are approaching the status of table stakes. Organisations that have not yet implemented BORIS are creating meaningful post-purchase friction and risking repeat purchase rates. For those that have, the question is no longer whether to offer it but how well it is executed: is it seamless, is it fast, and does it create a positive in-store experience that drives upsell opportunities, saved revenue through exchanges, and can it help increase future visits?

WHAT TO PRIORITISE NEXT

The central question for any leader responsible for fulfilment strategy is not whether to invest – it's where on the maturity curve to invest next. For organisations that do not yet show live local inventory on their PDP or accept online returns in-store, those are the immediate priorities. The data, the tooling, and the customer expectation are all in place. The barrier is often internal silos and legacy technology that is not built to support new fulfilment expectations.

For organisations that have the hygiene layer covered, the strategic question is how to activate store inventory as a fulfilment asset. That means auditing inventory accuracy across your store network, understanding your last-mile carrier options in high-density urban markets, and building the operational case for a same-day delivery pilot. The organisations already doing it have established the proof of concept. The question is how quickly the rest of the market follows and if you can keep at pace with the customer expectations.

- ***Activate what you already have.*** Surface fulfilment options where decisions happen, connect inventory to Google Local Inventory Ads, and enable filtering by local availability. This is about visibility and activation, not new infrastructure.
- ***Build the four-hour collection process.*** For retailers with store networks, this is one of the most commercially impactful near-term investments. It requires accurate inventory, clear in-store processes, and a simple customer-facing reservation flow.
- ***Audit your returns experience.*** BORIS is widespread, but execution varies. A fast, frictionless return can drive retention and upsell. A poor experience does the opposite. Assess it from the customer's perspective.
- ***Run a same-day delivery pilot.*** Start small with a city-level setup: selected stores, defined assortment, and a last-mile partner. The model is proven – the opportunity lies in how quickly it can be operationalised.

Ready to close the fulfilment gap? Reach out to Anders Wedendahl to explore how to activate your fulfilment capabilities, strengthen operational execution, and compete where it matters most – at the moment of customer intent.

Catch him at anw@impactcommerce.com

The next era of commerce is responsible.

How sustainability is shifting from differentiator to baseline – and why the brands moving fastest are treating it as a commercial opportunity, not a compliance exercise.

Insights by:
Louise Klüwer
Sustainability Lead
IMPACT Commerce

There is a version of sustainability that lives in annual reports and press releases. Ambitious targets, carefully worded commitments, and a dedicated page on the website. And then there is the version that shows up in the actual customer experience – in the repair service, the product transparency, the delivery options, the loyalty programme. The gap between those two versions is where most brands still live.

The Omnichannel Index 2026 shows something genuinely encouraging: sustainability as a discipline has made its biggest single leap yet, jumping from an average score of 19% in 2024 to 29% in 2026. For the first time, we have two brands achieving a perfect 100% score across every touchpoint we measure in this discipline.

But progress at the top shouldn't obscure what's happening in the middle. Two thirds of brands are still doing barely anything. The winners are scoring nearly twice the average. And in a discipline that ranks seventh out of nine, there is still an enormous business potential to unleash.

THE AGENDA ISN'T BECOMING UNIMPORTANT. IT'S MATURING

It would be easy, looking at the current political and media climate, to conclude that the sustainability agenda is losing momentum. It isn't. What's changing is the nature of it.

83% of companies globally are increasing their investment in sustainability – and those integrating it with performance, risk management and innovation hold the strongest competitive positions (Deloitte, 2025). Consumer interest remains stable despite broader global crisis fatigue. 67% of global consumers say they would switch brands due to a lack of sustainability commitment (Capgemini, 2025).

This isn't a soft signal. It goes straight to churn risk, brand equity and long-term loyalty.

WHAT THE LEADERS GET RIGHT

The top performers in this year's discipline are brands that have understood something simple: responsible commerce and good business aren't in tension. They go hand in hand.

Kappahl is one of the two first brands in the history of the Index to achieve a 100% score across our measured sustainability touchpoints. What's striking isn't any single initiative – it's the consistency. Transparency and traceability. Re-commerce. Accessibility. Consumer education, including guidance on the environmental footprint of returns. Fossil-free delivery. Loyalty rewards for responsible behaviour. Every part of the customer journey carries the same conviction.

"We're proud to be recognised in this year's Omnichannel Index – it reflects a long-term effort. For us, sustainability is part of how we run our business, not a separate function, but a capability across the entire organisation and customer journey."

Sandra Roos
Vice President Sustainability
Kappahl

"Our focus is to make it visible and relevant for customers, because they don't just compare price and style – they compare values. That's how we build trust and loyalty."

Madeleine Wibréus
Online Manager
Kappahl

Nudie Jeans is the other gold medal winner with an impressive score of 100% in sustainability. They have built a brand around longevity rather than volume. Their positioning – creating tomorrow's vintage – isn't a marketing line. It's a business model. Free forever repairs. Pre-loved denim. A clear net zero commitment underpinned by Science Based Targets. Product-level environmental footprint data. They are already operating at the standard that regulation is moving towards, which means they won't be scrambling when it arrives.

When looking at scale rather than pure score, ***IKEA*** and ***H&M*** are the most impressive performers – maintaining scores of 67–83% across six markets each. That level of consistency at scale is genuinely hard to achieve, and it reflects deep organisational commitment rather than market-by-market variation.

WHERE THE INDUSTRY IS MOVING FORWARD

Care & repair is the best-performing area in the discipline, scoring 59% across brands. That's a meaningful signal: more brands are taking responsibility in extending the product lifecycle, and customers are responding to it.

Accessibility has doubled from 20% in 2024 to 42% in 2026. That sounds like progress, and in relative terms it is. But 40% remains low for a capability that is both a legal requirement under the European Accessibility Act and a significant business driver.

The business case is straightforward: 1 in 5 adults lives with a disability that affects their experience. Inaccessible digital experiences don't just exclude those customers – they exclude their spending. Studies suggest better accessibility can increase organic traffic by up to 12%, and the ripple effects on conversion, loyalty and brand perception are significant.

At the same time, the people dimension of sustainability is catching up with the environmental one. For younger consumers, digital inclusion is no longer a bonus, it's expected. The European Accessibility Act makes this a compliance issue too. But the brands treating accessibility purely as a legal checkbox are missing the larger point – and the larger opportunity.

WHERE THE GAPS ARE

Re-commerce remains the most striking missed opportunity. Only 11% of brands have tapped into a market projected to grow 4.4x faster than overall retail. The infrastructure is available. The consumer demand is there. The brands moving now – like Bang & Olufsen with their Reloved programme – are building loyalty mechanics and revenue streams that don't exist for brands still waiting.

Rewarding sustainable behaviour is another area of significant underinvestment. Only 22% of brands give customers meaningful ways to make responsible choices, whether through material filters, circular services, or climate-friendly delivery (offered by only 16% of the assessed brands and retailers). Yet the upside is clear. Brands seen as socially and environmentally responsible can increase customer loyalty by up to 20%. That's not a soft metric – it's a retention lever.

THE NEXT ERA OF RESPONSIBLE COMMERCE IS TRANSPARENT

According to several brand studies, over 90% of consumers say brand transparency is important to their purchase decisions. Yet only 27% of brands in the Index provide transparency at a product level. That gap is about to become a compliance as well as a business opportunity gap.

The Digital Product Passport – coming as part of the Ecodesign for Sustainable Products Regulation – will require brands to provide full product-level transparency across the lifecycle. Materials, emissions, repairability, and sourcing. The brands treating this as a future compliance exercise are missing the point.

The smart brands – Kappahl, Nudie Jeans, IKEA, H&M have started to pilot the passports – and seem to understand that a Digital Product Passport isn't just a regulatory requirement. It's a data asset. A trust-building mechanism. A foundation for re-commerce, brand protection, loyalty and customer lifecycle extension. Google calls transparency a critical competitive differentiator – and the brands getting there first will have a structural head start.

THE BAR IS RISING. FOR BRANDS READY TO MOVE, THE OPPORTUNITY IS WIDE OPEN

Sustainability in the Omnichannel Index 2026 is a discipline with genuine winners – and a long tail of brands still to act. The distance between them is widening.

The brands at the top are the ones not just waiting for regulation to force their hand but instead treating sustainability as a commercial capability: a source of loyalty, a basis for transparency and trust building, a driver of new revenue models. They're walking before they talk and their scores reflect it.

The majority of consumers continue to express clear interest in sustainability. And the cost of inaction – non-compliance risk, reputational damage, customer attrition – is only increasing.

The next era of commerce needs to be more sustainable and responsible. The brands that understand this aren't just doing the right thing. They're building a stronger business.

READY TO CLOSE THE GAP?

Sustainability is no longer a side agenda. It's a commercial capability – and the brands building it now are pulling ahead. Here's how we help you get started:

01
SUSTAINABILITY & COMPLIANCE AUDIT

Understand where you stand across the full sustainability discipline – from re-commerce and repair to transparency, responsible delivery and consumer empowerment. Benchmarked against the Index and your category peers.

02
ACCESSIBILITY REVIEW

Find out how much of your market and compliance you're currently missing. We assess your digital experience against the global WCAG standards and the European Accessibility Act, identify gaps and give you a clear picture of where to act first.

03
DIGITAL PRODUCT PASSPORT READINESS

Get ahead of incoming regulation and unlock the commercial opportunity behind it. We help you understand what DPP means for your business, assess your data readiness and build a pilot and a roadmap towards full product transparency.

See how much of your market you're currently missing.

Catch Louise at lkl@impactcommerce.com to start the conversation.

Where video converts – and where brands are leaving value on the table.

From PDP blind spots to missed revenue moments – why the brands that rely most on emotional and sensory engagement are underinvesting in video, and how to scale what actually builds trust, reduces friction, and converts.

Insights by:
Anders Bom
Creative Lead
IMPACT Commerce

This year's Omnichannel Index dedicated ten questions to video. The one that matters most for commerce: do brands feature video on the product detail pages of their best-selling items?

Only 34.7% do.

A weak TikTok cadence means you're missing attention. A missing PDP video means you're losing sales – right at the moment the customer is ready to buy. This article looks at where that gap is widest, why the obvious fix is a trap, and what actually works.

THE CATEGORY PARADOX

The industry-level data makes the gap harder to ignore.

Electronics leads at 75%. Beauty and Pharmacy sits at 53%. Furniture and Home Interior at 52%. These are respectable numbers – not great, but they show these industries understand the value.

Then there's fashion. At 8%, it's dead last among major industries. Only 11 out of 99 fashion brands audited feature video on their best-selling product pages.

Here's the paradox: fashion is one of the industries where video matters most. A spec sheet can sell a laptop. Static images can sell a lamp if the photography is good enough. But fit, drape, texture, movement – these are the attributes that drive a fashion purchase decision, and they are fundamentally impossible to communicate in a still image.

Online shoppers suffer from what researchers call a "sensory gap." They can't touch, try on, or feel the product. They depend entirely on the digital presentation to evaluate quality. When that presentation fails to convey the physical attributes that matter, product uncertainty spikes and so do return rates.

Video bridges this gap. It lets customers see how fabric moves, how a shoe flexes on a foot, how a jacket fits across different body types. The industries with the biggest sensory gap are the ones most underinvesting in the format that closes it.

THE COST TRAP

The reason is obvious: cost. Producing quality video for hundreds or thousands of SKUs is a massive operational challenge, especially for fashion retailers with seasonal turnover and deep catalogs.

The tempting shortcut is equally obvious: use generative AI to mass-produce synthetic user-generated content. AI-generated product demos, AI-created "creator" videos, synthetic humans showing off your product at a fraction of the production cost.

This is a trap. The entire value proposition of UGC is that it's real. Consumers trust it precisely because it isn't produced by the brand. When that authenticity is faked, the effect doesn't just neutralise – it reverses. An AI-generated "unboxing" video doesn't solve the trust problem. It creates a new one.

Synthetic UGC is worse than no UGC. If consumers perceive that you've manufactured authenticity, you lose more credibility than if you'd simply left the PDP bare.

SCALING WHAT'S REAL

So, if you can't fake it, how do you fill the gap? The answer is to use AI to scale content that already exists – not to generate content that never did. The most practical application today is localisation: AI-powered dubbing, voice synthesis, and lip-syncing that adapts authentic video content for new markets and languages.

A genuine product review or a real creator walkthrough doesn't have to die in the language it was filmed in. With current AI tooling, that single piece of content can be adapted across every market you operate in, preserving the original voice, expression, and authenticity while making it accessible to a Danish, Dutch, Finnish, or Belgian audience.

This reframes AI's role entirely. It's not a content creator. It's an operational layer – a set of workflows, integrations, and triggers that maximise the value of real content across your catalog and your markets. That makes it a martech and data problem, not a creative brief.

For brands in this index (operating across six markets and multiple languages) this is arguably the lowest-hanging fruit available. The content exists. The AI tooling exists. The gap is in the operational layer that connects them.

FROM SCALING CONTENT TO SCALING CONVERSATIONS

Filling the PDP gap is the immediate win. But video's perhaps most interesting commercial impact doesn't come from sitting on a product page – it comes from being sent to the right person at the right moment.

Personalised video outreach – using customer data to trigger individually tailored video to leads and loyal shoppers – is where the numbers get serious. This isn't a first-name merge tag on a thumbnail. It can mean staff addressing a customer by name on camera, referencing their purchase history, or acknowledging their loyalty status directly.

And it's being done. When Danish retailer Kop & Kande launched a personalised video campaign for their 40th anniversary, targeting loyalty members with individually tailored videos, the results were striking.

The campaign drove a 40% conversion improvement among viewers compared to non-viewers, 52% of recipients watched their video more than once, and churn remained notably low throughout. Most tellingly, the effect wasn't confined to the digital channel – customers referenced the experience directly in physical stores.

"We activated personalised video across two campaigns, delivering strong engagement across all age groups. What stood out most was the offline impact – customers actively visited their local stores and referenced the experience. Negative feedback was minimal, and our low churn further reinforced the positive response. For us, it clearly confirmed how powerful personalisation can be when it's done in a way that feels relevant and on the customer's terms."

Magnus Asmussen
Digital Marketing & Motion Graphics Specialist
Kop & Kande

ARE YOU FULLY LEVERAGING THE COMMERCIAL POTENTIAL OF VIDEO?

It's not about producing more content, and it's not about cutting corners with synthetic versions of it. The real value comes from using video in places where it actually helps people understand what they're buying – how something moves, how it fits, how it behaves in real life – all the things that are hard to judge from a static image.

If you're interested in exploring how video can strengthen the overall experience in a more thoughtful and creative way, reach out to Anders Bom.

Catch him at abo@impactcommerce.com.

Translate your data into action

The Omnichannel Index reveals how 373 brands and retailers perform across 74 real customer touchpoints. We help you turn that insight into clear priorities, concrete initiatives, and measurable impact.

01

STRENGTHEN AND FUTURE-PROOF YOUR TECH ARCHITECTURE

We help you simplify and strengthen your architecture.

What you get:

- *A clear map of your current architecture, integrations, and data flows*
- *The structural gaps limiting scalability and customer experience*
- *A defined target architecture and prioritised roadmap*
- *Concrete recommendations across OMS, commerce and POS*

02

ALIGN YOUR OPERATING MODEL FOR OMNICHANNEL

We help embed omnichannel thinking across teams, processes, and operations.

What you get:

- *A clear view of how your organisation supports (or limits) omnichannel execution*
- *Alignment across channels, teams, KPIs, and incentives*
- *Identified growth opportunities in your omnichannel set-up*
- *Store teams enabled to drive omnichannel revenue (clienteling, fulfilment, assisted selling)*

03

ACTIVATE CUSTOMER DATA ACROSS THE JOURNEY

We help you turn data into connected experiences that drive conversion and lifetime value.

What you get:

- *A validated CRM and loyalty setup benchmarked against best practice*
- *Increased customer data capture in stores and online*
- *Defined personalisation use cases across key touchpoints*
- *Stronger activation of data across marketing, commerce, and stores*

04

PRIORITISE AI WHERE IT DRIVES REAL IMPACT

We help you focus on the AI use cases that matter.

What you get:

- *A clear view of your visibility in AI-driven discovery*
- *Prioritised AI use cases with real business impact*
- *An assessment of readiness across search, service, and agentic checkout*
- *Identified operational efficiency*

Scan the QR code to book a tailored omnichannel session with our experts – and get a clear view of where to act, what to prioritise, and how to accelerate.

Leading the next era of commerce

IMPACT Commerce is a European full-service digital consultancy, helping brands and retailers turn ambition into measurable impact through scalable, tailored commerce experiences.

With 400+ specialists across eight cities, we bring together strategy, technology, and data to create seamless customer journeys, supported by a strong partner ecosystem.

For over 25 years, we've worked side by side with our clients to unlock growth, improve efficiency, and strengthen customer loyalty. From strategy and design to architecture, development, and marketing activation, everything is delivered in-house, ensuring accountability and adaptability at every stage.

STRATEGY & GROWTH

Growth & Optimisation

Agentic Commerce

Omnichannel Strategy

Change Management & Operational Excellence

Responsible Commerce

EXPERIENCE DESIGN

Strategic Direction

Insight & Opportunity

Experience Design

Design for Delivery

Experience Performance

ARCHITECTURE & TECHNOLOGY

Advisory & Architecture

Engineering Experts & Solutions

Omnichannel Platforms & Retail Applications

Data, AI & Automation

Cloud & Infrastructure

CRM & LOYALTY

CRM Strategy & Loyalty Concept

Personalisation at Scale

Customer Data

Martech & Architecture

CRM Delivery

Get in touch

Want to talk omnichannel?

Curious about your company's performance data? Want to learn more about our omnichannel offerings? Or have questions about the findings, insights and results in this report?

Whatever's on your mind, we'd love to talk. Feel free to reach out.

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Full index 2026

A

BRAND	COUNTRY	TOTAL SCORE
A.S.ADVENTURE	BELGIUM	42%
ACNE STUDIOS	SWEDEN	41%
ACTION	THE NETHERLANDS	20%
ADIDAS	THE NETHERLANDS	59%
ÅHLÉNS	SWEDEN	50%
AKADEMIBOKHANDELN	SWEDEN	28%
ALKO OY	FINLAND	31%
ANTON SPORT	NORWAY	36%
APOTEK HJÄRTAT	SWEDEN	41%
APOTEK1	NORWAY	35%
APOTEKET	SWEDEN	47%
APRIL PLANET PARFUM	BELGIUM	28%
ARK BOKHANDEL	NORWAY	36%
ARKENZOO.SE	SWEDEN	42%
ARKET	SWEDEN	45%
ASICS	THE NETHERLANDS	49%
ASKO	FINLAND	27%

B

BRAND	COUNTRY	TOTAL SCORE
B-YOUNG	NORWAY	27%
BABYSAM	DENMARK	47%
BADEMILJØ	NORWAY	24%
BAHNE	DENMARK	41%
BANG & OLUFSEN	DENMARK	24%
BARNAS HUS	NORWAY	42%
BAUHAUS	DENMARK	39%
BEIJER	SWEDEN	30%
BELLEROSE	BELGIUM	41%
BERGANS OF NORWAY	NORWAY	41%
BERSHKA	THE NETHERLANDS	45%
BETER BED	THE NETHERLANDS	41%
BEVER	THE NETHERLANDS	42%
BILKA	DENMARK	36%
BILTEMA	SWEDEN	38%
BILXTRA	NORWAY	27%
BJØRKLUND NORGE	NORWAY	43%
BJÖRN BORG	SWEDEN	31%
BOCONCEPT	DENMARK	24%
BOG & IDÉ	DENMARK	45%
BOHUS	NORWAY	39%
BOLIA	NORWAY	35%
BOLIA	DENMARK	32%
BOLIST	SWEDEN	18%
BOOTS PHARMACY NORWAY	NORWAY	32%
BR	DENMARK	32%
BRICO	BELGIUM	46%
BROTHERS	SWEDEN	28%
BUDGET SPORT	FINLAND	39%
BYGGERN	NORWAY	38%
BYGGMAKKER	NORWAY	24%
BYGGMAX	SWEDEN	34%
BYGMA	DENMARK	39%

C

BRAND	COUNTRY	TOTAL SCORE
C&A	BELGIUM	46%
C&A	THE NETHERLANDS	42%
CARLINGS	NORWAY	49%
CERVERA	SWEDEN	47%
CHANGE	SWEDEN	38%
CHAUSSEA	BELGIUM	46%
CHRISTIANIA BELYSNING	NORWAY	26%
CITYMARKET	FINLAND	27%
CLAS OHLSON	SWEDEN	46%
CLAS OHLSON	NORWAY	41%
CLAS OHLSON	FINLAND	36%
COMFORT	NORWAY	16%
COOLBLUE	BELGIUM	49%
COOLBLUE	THE NETHERLANDS	47%
COS	SWEDEN	39%
COURIR	BELGIUM	39%
CUBUS	NORWAY	54%
CUBUS	SWEDEN	51%

D

BRAND	COUNTRY	TOTAL SCORE
DA DROGIST	THE NETHERLANDS	18%
DAVIDSEN DK	DENMARK	35%
DE BIJENKORF	THE NETHERLANDS	46%
DECADES	NORWAY	36%
DECATHLON	BELGIUM	61%
DECATHLON	THE NETHERLANDS	59%

BRAND	COUNTRY	TOTAL SCORE

D

BRAND	COUNTRY	TOTAL SCORE
DEICHMANN	DENMARK	35%
DIN TØJMAND	DENMARK	20%
DINSKO	SWEDEN	34%
DOUGLAS	THE NETHERLANDS	49%
DOZ APOTEK	SWEDEN	27%
DREAMBABY	BELGIUM	35%
DREAMLAND	THE NETHERLANDS	32%
DREAMLAND	BELGIUM	30%
DRESSMANN	NORWAY	49%

E

BRAND	COUNTRY	TOTAL SCORE
ECCO	DENMARK	36%
ECCO	THE NETHERLANDS	34%
ELECTRO WORLD	THE NETHERLANDS	20%
ELEKTROIMPORTØREN	NORWAY	46%
ELGIGANTEN	DENMARK	53%
ELGIGANTEN	SWEDEN	47%
ELKJØP	NORWAY	55%
ELON	SWEDEN	41%
EPLEHUSET	NORWAY	32%
ETOS	THE NETHERLANDS	39%
EUROKANGAS OY	FINLAND	27%
EUROPRIS	NORWAY	34%
EUROSKO	NORWAY	35%

F

BRAND	COUNTRY	TOTAL SCORE
FAGMØBLER	NORWAY	32%
FARGERIKE	NORWAY	34%
FELLESKJØPET	NORWAY	24%
FLOYD	NORWAY	35%
FLÜGGER	DENMARK	30%
FLYING TIGER COPENHAGEN	DENMARK	20%
FNAC	BELGIUM	50%
FOOT LOCKER	THE NETHERLANDS	54%
FOOT LOCKER	BELGIUM	34%
FØTEX	DENMARK	39%
FRI BIKESHOP	DENMARK	31%

G

BRAND	COUNTRY	TOTAL SCORE
G-STAR RAW	THE NETHERLANDS	36%
GAMMA	BELGIUM	50%
GAMMA	THE NETHERLANDS	50%
GANNI	DENMARK	36%
GANT	SWEDEN	45%
GANT	THE NETHERLANDS	42%
GARANT	DENMARK	27%
GEORG JENSEN	DENMARK	34%
GIGANTTI	FINLAND	54%
GINA TRICOT	SWEDEN	43%
GRANNGÅRDEN	SWEDEN	36%
GUDRUN SJÖDEN	SWEDEN	30%
GULLFUNN	NORWAY	51%

H

BRAND	COUNTRY	TOTAL SCORE
H&M	THE NETHERLANDS	50%
H&M	NORWAY	47%
H&M	DENMARK	46%
H&M	SWEDEN	46%
H&M	FINLAND	45%
H&M	BELGIUM	43%
HAGELAND	NORWAY	28%
HAGLÖFS - SE	SWEDEN	36%
HALONEN	FINLAND	23%
HARALD NYBORG	DENMARK	19%
HELLY HANSEN	NORWAY	34%
HELSAM	DENMARK	23%
HEMA	THE NETHERLANDS	53%
HEMA	BELGIUM	46%
HEMTEX	SWEDEN	45%
HIFI KLUBBEN	DENMARK	58%
HORNBACH	THE NETHERLANDS	35%
HUBO BELGIUM	BELGIUM	49%
HUGO BOSS	BELGIUM	39%
HUMAC	DENMARK	27%
HUMMEL	DENMARK	26%
HUNKEMÖLLER	DENMARK	41%
HUNKEMÖLLER	THE NETHERLANDS	41%

I

BRAND	COUNTRY	TOTAL SCORE
ICI PARIS XL	THE NETHERLANDS	45%

I

BRAND	COUNTRY	TOTAL SCORE
ICI PARIS XL	BELGIUM	39%
IITTALA	FINLAND	28%
IKEA	DENMARK	72%
IKEA	SWEDEN	70%
IKEA	BELGIUM	66%
IKEA	THE NETHERLANDS	61%
IKEA	NORWAY	58%
IKEA	FINLAND	58%
ILLUMS BOLIGHUS	DENMARK	43%
ILVA	DENMARK	47%
IMERCO	DENMARK	50%
INDISKA MAGASINET AB	SWEDEN	31%
INNO	BELGIUM	20%
INTERSPORT	NORWAY	32%
INTERSPORT	FINLAND	32%
INTERTOYS	THE NETHERLANDS	35%

J

BRAND	COUNTRY	TOTAL SCORE
J.LINDEBERG	SWEDEN	38%
JACK & JONES	DENMARK	39%
JACK & JONES	THE NETHERLANDS	35%
JAPAN PHOTO	NORWAY	24%
JBC	BELGIUM	41%
JD SPORTS	THE NETHERLANDS	39%
JEM & FIX	DENMARK	28%
JERNIA	NORWAY	43%
JULA	SWEDEN	49%
JUMBO	THE NETHERLANDS	36%
JUTTU	BELGIUM	39%
JYSK	DENMARK	42%
JYSK	THE NETHERLANDS	39%

K

BRAND	COUNTRY	TOTAL SCORE
K-RAUTA	FINLAND	34%
K-RAUTA	SWEDEN	32%
KAPPAHL	SWEDEN	54%
KARWEI	THE NETHERLANDS	51%
KEKÄLE	FINLAND	41%
KICKS	SWEDEN	57%
KID INTERIØR	NORWAY	38%
KIDS COOLSHOP	DENMARK	41%
KING JOUET	BELGIUM	32%
KITCH'N	NORWAY	45%
KJELL & COMPANY	SWEDEN	55%
KOP & KANDE	DENMARK	51%
KRËFEL	BELGIUM	43%
KRONANSAPOTEK	SWEDEN	38%
KRUIDVAT	THE NETHERLANDS	38%
KRUIDVAT	BELGIUM	36%
KULTAJOUSI	FINLAND	26%
KWANTUM	THE NETHERLANDS	36%

L

BRAND	COUNTRY	TOTAL SCORE
LAATUKORU	FINLAND	24%
LAGER157	SWEDEN	36%
LAGERHAUS	SWEDEN	45%
LAKRIDS BY BÜLOW	DENMARK	27%
LEEN BAKKER	THE NETHERLANDS	30%
LEGEKÆDEN	DENMARK	28%
LEGO	DENMARK	41%
LEKIA	SWEDEN	23%
LES DEUX	DENMARK	23%
LEXINGTON	SWEDEN	28%
LINDEX	SWEDEN	51%
LINDEX	FINLAND	43%
LINDEX	DENMARK	39%
LUCARDI	THE NETHERLANDS	45%
LUHTA	FINLAND	20%
LYKO	SWEDEN	47%

M

BRAND	COUNTRY	TOTAL SCORE
MAGASIN	DENMARK	42%
MAISON DU MONDE	BELGIUM	42%
MANGO	BELGIUM	51%
MANGO	THE NETHERLANDS	45%
MARIMEKKO	FINLAND	47%
MASKU	FINLAND	38%
MATAS	DENMARK	69%
MATCH	NORWAY	36%
MAXBO	NORWAY	39%

BRAND	COUNTRY	TOTAL SCORE
MEDIAMARKT	THE NETHERLANDS	42%
MEGAFLIS	NORWAY	45%
MEKONOMEN	SWEDEN	31%
MESTER GRØNN	NORWAY	41%
MIO	SWEDEN	41%
MØBELRINGEN	NORWAY	28%
MONTANA	DENMARK	19%
MONTER	NORWAY	36%
MOTONET	FINLAND	34%
MULBERRY	DENMARK	26%
MULTIPHARMA	BELGIUM	19%
MUSTI & MIRRI	FINLAND	43%

N

NAME IT	DENMARK	42%
NAME IT	THE NETHERLANDS	31%
NANSO	FINLAND	38%
NATURKOMPANIET	SWEDEN	50%
NELSON SCHOENEN	THE NETHERLANDS	34%
NETONNET	SWEDEN	54%

BRAND	COUNTRY	TOTAL SCORE
NEW BALANCE	THE NETHERLANDS	41%
NEYE	DENMARK	43%
NIKE	THE NETHERLANDS	45%
NILLE	NORWAY	22%
NORLI	NORWAY	49%
NORMAL	DENMARK	23%
NORRØNA	NORWAY	53%
NUDIE JEANS AB	SWEDEN	41%

O

OBS BYGG	NORWAY	46%
OMODA	THE NETHERLANDS	45%
ONLY	DENMARK	30%
ONLY	THE NETHERLANDS	24%
ÖOB	SWEDEN	23%
OSCAR JACOBSON	SWEDEN	34%

P

PANDORA	THE NETHERLANDS	46%

BRAND	COUNTRY	TOTAL SCORE
PANDORA	BELGIUM	45%
PANDORA	DENMARK	43%
PANDURO	SWEDEN	35%
PARTIOAITTA	FINLAND	46%
PEAK PERFORMANCE	SWEDEN	45%
PETS PLACE	THE NETHERLANDS	22%
PIECES	DENMARK	43%
PILGRIM	DENMARK	38%
PLANTAGEN	SWEDEN	30%
PLANTORAMA	DENMARK	30%
POLARN O. PYRET	SWEDEN	42%
POWER	DENMARK	51%
POWER	FINLAND	51%
POWER	NORWAY	50%
POWER	SWEDEN	50%
PRAXIS	THE NETHERLANDS	50%
PRIMARK	THE NETHERLANDS	19%
PRINCESS	NORWAY	28%
PRISMA	FINLAND	30%
PUMA	THE NETHERLANDS	41%
PUUILO	FINLAND	35%

R

BRAND	COUNTRY	TOTAL SCORE
RAINS	DENMARK	32%
REIMA	FINLAND	41%
RITUALS	THE NETHERLANDS	51%
RITUALS	DENMARK	42%
RITUALS	SWEDEN	35%
ROYAL COPENHAGEN	DENMARK	27%
RUNNERSWORLD	THE NETHERLANDS	22%
RUSTA	SWEDEN	45%

S

SALLING	DENMARK	27%
SAMSØE & SAMSØE	DENMARK	27%
SCAPINO	THE NETHERLANDS	38%
SCORETT	SWEDEN	42%
SELECTED	DENMARK	41%
SEPHORA	DENMARK	42%
SHOEBY	THE NETHERLANDS	46%
SILVAN	DENMARK	28%

BRAND	COUNTRY	TOTAL SCORE
SKEIDAR	NORWAY	34%
SKETCHERS	DENMARK	23%
SKORINGEN	DENMARK	45%
SKORINGEN	NORWAY	34%
SKOUSEN	DENMARK	35%
SOFACOMPANY	DENMARK	34%
SOKOS	FINLAND	34%
SOKOS EMOTION	FINLAND	32%
SØSTRENE GRENE	DENMARK	43%
SOTKA	FINLAND	26%
SOVA AB	SWEDEN	24%
SPAR KJØP	NORWAY	30%
SPEJDERSPORT	DENMARK	36%
SPORT 1	NORWAY	26%
SPORT OUTLET	NORWAY	35%
SPORT24	DENMARK	55%
SPORTS DIRECT	BELGIUM	28%
STADIUM	SWEDEN	38%
STANDAARD BOEKHANDEL	BELGIUM	38%
STARK	DENMARK	35%
STARK	FINLAND	26%

BRAND	COUNTRY	TOTAL SCORE
STEEN&STRØM	NORWAY	28%
STOCKMANN	FINLAND	43%
STORMBERG	NORWAY	31%
SUOMALAINEN KIRJAKAUPPA	FINLAND	45%
SWAROVSKI	THE NETHERLANDS	46%
SWEDOL	SWEDEN	26%
SWISS SENSE	THE NETHERLANDS	32%
SYSTEMBOLAGET AB	SWEDEN	30%

T

T. HANSEN	NORWAY	30%
T. HANSEN	DENMARK	28%
TEAM SPORTIA	SWEDEN	20%
TERSTAL	THE NETHERLANDS	32%
THE STING	THE NETHERLANDS	30%
TIGER OF SWEDEN	SWEDEN	41%
TILBORDS	NORWAY	51%
TIMANTTISET	FINLAND	35%
TØJEKSPERTEN	DENMARK	38%
TOKMANNI	FINLAND	39%

BRAND	COUNTRY	TOTAL SCORE
TOKMANNI	FINLAND	39%
TOM&CO	BELGIUM	22%
TOMMY HILFIGER	THE NETHERLANDS	42%
TORFS	BELGIUM	41%
TRADEMAX	SWEDEN	24%
TREKPLEISTER	THE NETHERLANDS	18%

U

UNIQLO	THE NETHERLANDS	42%
UR & PENN	SWEDEN	41%
URBAN	NORWAY	26%

V

VAGABOND INTERNATIONAL AKTIEBOLAG	SWEDEN	34%
VANDEN BORRE	BELGIUM	36%
VANHAREN	BELGIUM	43%
VANHAREN	THE NETHERLANDS	42%
VEIKON KONE	FINLAND	26%
VEPSÄLÄINEN	FINLAND	27%
VERITAS	BELGIUM	31%
VERKKOKAUPPA.COM	FINLAND	68%

BRAND	COUNTRY	TOTAL SCORE
VERO MODA	SWEDEN	39%
VERO MODA	DENMARK	38%
VIC	NORWAY	34%
VILA	DENMARK	38%
VINMONOPOLET	NORWAY	32%
VIPP	DENMARK	20%
VITA	NORWAY	32%
VITUS PHARMACY	NORWAY	35%
VOLT	NORWAY	41%

W

WAGNER	DENMARK	26%
WE FASHION	THE NETHERLANDS	39%
WEBHALLEN	SWEDEN	51%
WELKOOP	THE NETHERLANDS	28%

X

XENOS	THE NETHERLANDS	34%
XL - BYGG	SWEDEN	19%
XL-BYG	DENMARK	33%
XL-BYGG	NORWAY	23%

BRAND	COUNTRY	TOTAL SCORE
XXL SPORT	SWEDEN	46%
XXL SPORT	FINLAND	43%
XXL SPORT	NORWAY	42%

Y

BRAND	COUNTRY	TOTAL SCORE
YEPPO&SOONSOO	FINLAND	31%
YLIOPISTON APTEEKKI	FINLAND	20%

Z

BRAND	COUNTRY	TOTAL SCORE
ZARA	BELGIUM	51%
ZARA	THE NETHERLANDS	39%
ZEB	BELGIUM	26%
ZEEMAN	THE NETHERLANDS	18%
ZIENGS	THE NETHERLANDS	35%
ZIZZI	DENMARK	45%
ZOO.SE	SWEDEN	36%

# #

BRAND	COUNTRY	TOTAL SCORE
& OTHER STORIES	SWEDEN	42%

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