Omnichannel Index

PRESS PRE-READ

Omnichannel Index 2024

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Foreword

At IMPACT Commerce, we're committed to extraordinary customer experiences, creating growth and empowering sustainable transformation in commerce. This fourth edition of our Omnichannel Index is the product of a strategic partnership with Google, which has allowed us to include the Netherlands and Belgium alongside our already solid base in the Nordics. Together with the brilliant minds at Google, we've reviewed a total of six markets, 70 touchpoints, over 350 companies, resulting in more than 25,000 data points. Now, we're very proud to offer you the biggest and most comprehensive omnichannel study in Europe to date.

This index is designed to provide you with the foundation for a roadmap for the complex landscape in which you're operating. Your customers want value for money but also seek extraordinary and authentic experiences. These two concepts are not mutually exclusive. What binds them together is a sense of purpose, ideally delivered through personalised services. We believe the next inspiring and innovative commerce experience can be unlocked by customer-centric curiosity. Only by truly understanding customers can we build smarter businesses where both our customers and employees thrive.

Customer acquisition is becoming more competitive. At the same time, it takes more effort to retain customers. Direct-to-consumer brands struggle to deliver a differentiated value proposition. Multibrand retailers face pressure to deliver efficient operations and extraordinary service. All this while the distinction between brands and multibrand retailers is becoming increasingly blurred, with more retailers venturing into producing their own products and establishing themselves as brands.

To stay competitive, both multibrand retailers and direct-to-consumer brands must create inspiring experiences and build relationships with their customers that only omnichannel can offer. A well-oiled omnichannel operating model delivers on customers' expectations while meeting growth and profit targets. This index is an empowerment tool, designed to guide you towards this goal, highlighting opportunities worth pursuing and roadblocks to avoid. Ultimately, it should serve as a point of departure for action and inspire you to deliver superior customer experiences and foster sustainable business practices.

Kasper Holst,
CEO
IMPACT Commerce

EXECUTIVE SUMMARY 2024

9 KEY TAKEAWAYS

This fourth edition of the Omnichannel Index shows improvements within some areas and worrying standstills within others. Compared to the last study from 2022, the overall impression remains pretty much the same: it's one of evolution, not revolution.

With companies navigating unstable market conditions and facing the curveballs of the post-pandemic era, geopolitical turmoil, the climate crisis and a pressured supply chain, it's easy to understand that business operations can be tough. However, a strong omnichannel strategy is proven to drive both topline and profit. In fact, omnichannel customers across the Nordics, the Netherlands and Belgium make, on average, 2.9 times more purchases and spend 2.2 times more compared to single-channel customers.

One thing is to state "omnichannel" in your strategy; another thing is to break it down and make it actionable, identifying your competitive arena and your focus. Below, you'll find our nine key takeaways from this year's research. These pieces of executive insight are meant to illuminate the market situation and provide inspiration for you and your organisation. All the takeaways are interconnected; some more than others, but each plays an important role in assessing omnichannel performance. We focus on areas where we see clear gaps between customer expectations and retail performance, with the clear mission of highlighting that there are still plenty of opportunities to differentiate and win market shares out there.

01

LOYALTY NEEDS AN OVERHAUL

We hate to break it to you, but a sign-up offer is not a loyalty concept. While 73% of shoppers say loyalty programmes are important to them when deciding which brand or multibrand retailer to buy from, too many companies attempt to market what's basically a newsletter base as a "loyalty club." They offer new customers 10% off to lure them in – but lure them into what exactly?

While traditional point-based models with monetary rewards still attract many, they often fall short for Gen Z, who crave exclusive perks and experiences. Our findings show that brands and multibrand retailers mainly focus on monetary benefits, overlooking the potential of more exclusive rewards. Furthermore, with an index average of 65% offering monetary loyalty benefits, it's clear that too many businesses still forget to actually reward the customers who have stuck around for years. With some studies suggesting that it costs 5-7 times more to acquire new customers than to retain existing ones the high cost of customer acquisition obviously poses a problem.

Focusing on your loyal customer base grants you access to a significant advantage: first-party data. These insights can guide you in acquiring new customers who resemble your loyal base, completing the cycle by retaining loyal customers, gathering necessary insights for acquiring new customers and reaping business benefits.

We predict that loyalty programmes will undergo significant evolution in the coming years. Why? Because monetary benefits don't build true brand ambassadors. Exclusive benefits where your customers truly feel like they are part of a club does. Building a truly differentiating format that gathers brand ambassadors demands that you're crystal clear on your brand offering. What's your purpose? What do you give your customers that they can't get anywhere else? Build your offering around what makes you unique and see the base of truly loyal customers grow in the years ahead.

02

BASIC OMNICHANNEL, PERSISTENT PROBLEMS

The boundaries between offline and online channels have never been more blurred, making an omnichannel approach more important than ever. According to Google Smart Shopper, 60.5% of shoppers in each of the researched countries are channel-agnostic, meaning they do not have a strong preference for one channel over another. In today's market, multibrand retailers cannot afford to neglect either channel – they must skillfully merge them to meet the evolving demands of modern consumers.

Among the 70 touchpoints covered in the Omnichannel Index, we consider some to be hygiene factors for a modern omnichannel experience. It's encouraging to see that 75% of multibrand retailers now let customers return online purchases in-store and that 84% provide store associates with access to inventory from sister stores.

We were, however, surprised to see that click-and-collect and reserve-and-collect (at an average of 62%) are not more widely used, as they are key drivers for in-store traffic. With 65% of consumers

stating they check if an item is in stock before going to the store, it's fair to expect the current number of brands and multibrand retailers displaying in-store availability on PDPs to rise (from its current total of 71%).

Some persistent problems are linked to defining suitable business models, processes and incentives. However, these issues stem from human, not technological, shortcomings. The required technology already exists, but reluctance to adopt it forces stores to assume a somewhat traditional role, resulting in partial disconnection from digital platforms. As a result, stores fail to play as significant a role as they should in driving sales and creating memorable experiences. To succeed, companies must break down organisational silos and implement the right incentives. Without the appropriate incentives to support omnichannel services, stores (as well as e-commerce teams) are less committed to prioritising them. Simple as that.

03

CUSTOMER DATA IS KEY

If you want to survive as a business, loyalty-boosting marketing is a must-have. To drive it, you need data. It's simple really: without data, you'd be hard-pressed to run a thriving business. Since our last index in 2022, the collection of first-party data has evolved from being a topic that some discussed to becoming a strategic imperative for all.

From 2022 to 2024, the proportion of companies ensuring online recruitment at checkout has increased from 67% to 76%, while in-store recruitment has risen from 50% to 58%. Nonetheless, it's unfortunate that many companies miss out on the opportunity to recruit in-store, as in-store conversions typically don't incur additional costs compared to acquiring newsletter signups through digital marketing channels. So, why not capitalise on this opportunity to increase customer interactions by inviting your customers to join your newsletter or loyalty club while they are in the store? After all, onboarding customers this way leads to more interactions, ultimately resulting in a higher customer lifetime value.

One thing is collecting customer data – another thing is consolidating and using it. Data is powerful, but virtually useless if left unorganised and devoid of insights or structure. Most of the companies that succeed with the collection of first-party data have a data strategy in place and use technology (such as a customer data platform) to consolidate it, which can then be used to improve the way they communicate with and inspire their customers throughout the customer journey.

04

ACTIVATE YOUR FULL INVENTORY

Customers expect to be able to place an order and receive that order however they want, whenever they want. Supporting this kind of flexibility is quite the challenge in a moving market. While multi-brand retailers have plenty of room for improvement, scoring 49% in the Stock Data & Fulfillment discipline, brands especially must up their game on order management from their current score at 38%.

Focusing on activating your full inventory ensures you never turn down a potential order. Initiatives like click-and-collect, reserve-and-collect, in-store endless aisle solutions, drop-shipping and ship-from-store are crucial. A single view of stock can help you establish the right order routing that considers potential revenue, shipment costs and delivery times. It also involves activating staff both in-store and in your warehouses during slow hours, managing stock turnover, deadstock and minimising emissions from deliveries.

While smaller stores can benefit from endless aisle solutions, using your larger local stores with higher inventory depth as fulfilment centres can significantly increase operational efficiency and impact revenue, delivery costs, delivery time and last mile delivery emissions. However, only 20% of the companies in this index currently offer ship-from-store.

Our research shows that with an effective setup, companies can fulfil 10-50% of digital orders from the store. This percentage varies depending on the market, category and strategy in place. It's important to keep in mind that the order is shipped from the store for two main reasons: either because the alternative is to not offer the product and lose the sale, or to avoid higher delivery emissions and extended delivery times, which could potentially lead to a loss of conversions and profit.

05

CLIENTELING BUILDS 1-1 RELATIONSHIPS

While clienteling has traditionally been associated with the high-end and luxury markets, the mechanisms involved revolve around advising and inspiring your customers across channels – an approach that's relevant for anyone looking to build brand loyalty.

Clienteling takes personalisation to the next level by building long-lasting relationships between retail associates and customers. According to Gartner, 71% of consumers expect companies to be well-informed about their personal information during an interaction. Still, many companies continue to engage in clienteling in a somewhat traditional fashion, i.e. sales associates proactively reach out to their loyal customers to showcase new arrivals or follow up on their recent purchases, often through private Messenger or WhatsApp accounts. This solution poses two big challenges: it's not scalable and it's not GDPR compliant.

To effectively scale clienteling (while ensuring compliance), it's essential to provide your staff with tools and insights that enable easy communication with customers to renew interest, offer support throughout the buying process and follow up post-purchase. To get there, you need to build a single view of your customers for optimised personalised experiences. Furthermore, it empowers your staff to deliver better customer service and in-store advisory. A solid foundation for this approach is a mobile point-of-sale system (mPOS). However, only 4% of the surveyed companies have implemented mPOS in their stores, which is somewhat surprising considering that when sales associates actively participate in clienteling activities, the total number of transactions – both online and in-store – can rise by 5%. Perhaps even more important, customers who are serviced through clienteling have a four times higher average annual spend, only underscoring the imperative for bold clienteling strategies.

06

SUSTAINABILITY: BURNING PLATFORM AND GLOWING OPPORTUNITY

The retail industry in the EU accounts for 40% of the EU's total CO2 emissions. Read that again. We need to take decisive action now; both the planet and consumers demand it. No less than 59% of global consumers intend to boycott brands that doesn't take action on climate change, and while you might dismiss it as virtue signalling and expect the Say-Do Gap (i.e. the discrepancy between what we say and what we actually do in practice) to remain open, a study from McKinsey finds that consumers genuinely care about sustainability and actively support it with their wallets.

For many consumers, sustainability is hard to navigate, which makes it hard for them to back up their intentions with action. Should you buy the locally produced organic tomatoes grown in a heated greenhouse or the non-organic tomatoes shipped in from the south? A brand-new electric car or a used diesel car? For that reason, it's a bit troubling to see that very few companies (<1% to be exact) are early adopters of traceability and transparency initiatives with digital product passport (DPP), which could help consumers navigate and inspire them to act more sustainably.

With only 11% of businesses in this index offering second-hand shopping online, it's perhaps not too surprising that, as of 2023, only 7.2% of the global economy was circular. This lack of focus on circular business models is cause for concern, especially when we consider that embracing a global circular economy could enable us to meet people's needs with less than 70% of the materials currently extracted and used. Additionally, the global re-commerce market is forecasted to grow at a CAGR of almost 20%. Suffice it to say, if you don't tap into this chance to meet customer needs, your competitors will.

08

OPTIMISE MARGINS AND REVENUE WITH GENERATIVE AI

AI is the talk of town in 2024, and since it's set to dominate the immediate future, we need to make the most of it. You need to look no further than to marketing (content creation and translation) or customer service to find use cases where AI is already delivering substantial cost savings while reshaping the customer experience. Generative AI is expected to drive increased productivity, particularly in parts of your organisation with many knowledge-based roles. According to Bain & Company, 37% of work in IT, 32% in marketing and PR and 29% in sales and customer service can be automated using generative AI.

While we tend to focus on cost saving, generative AI is so much more than that. With new concepts ranging from virtual try-on, assisted sales and hyper-personalisation, generative AI presents a transformative business opportunity. It has the potential to drive revenue by creating unique customer experiences and accelerate your time-to-market for new revenue streams and e-commerce operations.

However, AI is only as good as you make it; feed it a bad prompt and it'll give you a bad solution. From an ethical and legal standpoint, AI presents numerous pitfalls, ranging from deep-fakes and issues of trust to concerns about data ethics and biases. While compliance efforts have been slow, they are now gaining momentum.

Everyone who is into efficiency and next-level customer experiences (as most multibrand retailers should be!) will need to get on top of the AI game – sooner rather than later. Since generative AI will probably disrupt retail, you need to ask yourself if you want to be an early innovator or a laggard? Your decision will end up impacting your market share.

07

BE COMPLIANT, NOT COMPLACENT

While both local and EU regulations will continue to apply to the companies covered in this index, compliance is still underestimated, understaffed and underprioritised. And many brands and multibrand retailers have begun addressing these issues much too late.

Take GDPR cookie regulations as an example. Only 69% of the companies surveyed are cookie compliant. While there's so much more to compliance, this gap not only exposes the non-compliant companies to potential fines, it also underscores the urgent need for a paradigm shift in data handling. If this many players fail to get this relatively simple compliance matter right, how will they cope with upcoming challenges such as accessibility compliance, the rollout of digital product passports and the right to repair act?

Many companies struggle with compliance due to a lack of awareness about the business opportunities it presents and the risks of non-compliance. Additionally, they tend to underestimate the effort needed for compliance, especially when regulations are not yet in force. Take accessibility as an example. Building accessible sites for people with disabilities greatly aligns with best practices in UX and makes your site easier to navigate and use for all your customers. With the European Accessibility Act 2025 looming and a recent study revealing that $16.8 billion in global e-commerce sales are lost annually due to inaccessible websites, why wait to comply? Why risk falling behind next year, even as you lose revenue now?

09

COMMUNITY CALLS

Our last Omnichannel Index came out in 2022 – while we were still in the midst of responding to the pandemic. After isolation and lockdowns, many missed their close relationships but perhaps more subconsciously, we also longed for interactions with strangers. And these interactions are important. With loneliness on the rise globally – bringing people together can help to solve a significant challenge in our society.

At a time when our digital experiences, especially on social media, are highly curated and personalised to confirm our perspectives and thoughts, being in contact with strangers exposes you to diverse ideas, benefits your flexibility of thinking and boosts your overall happiness. Omnichannel multibrand retailers can create these interactions – especially in stores. But to drive people to stores, we need to

build experiences that are worth taking part in. Multibrand retailers can create actual communities, and some in this index have already started to do so with cycling and sewing clubs and unique launch experiences.

Looking to reach and showcase your online community? One way to do so is through user-generated content (UGC). The index shows that 42% display customer reviews on PDPs, while only 10% show visual user-generated content on PDPs – indicating that few have integrated community-generated content into their systems. This is even though 86% of consumers consider authenticity important when choosing which brands to support, and 79% state that user-generated content highly influences their purchasing decisions.

Community is a powerful way to think about customer loyalty, and future winners will heed the call for community rather than shy away from it.

Written by

Kasper Holst
CEO

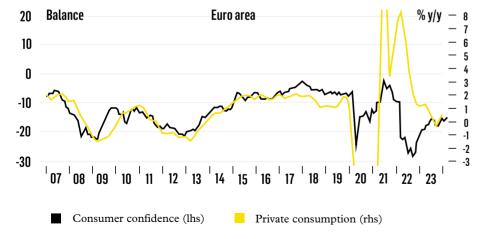**Karoline Lotz Jonassen**
Future Commerce Lead

THE ECONOMY WAVES GOODBYE TO CONTRACTION

The euro area economy is currently stagnating as the historically large monetary policy tightening by the European Central Bank (ECB) has dampened demand. Yet, growth has been better than feared, and recent data point to a stagnant economy that is gradually improving. Inflation has decreased more rapidly than anticipated, and all underlying measures of inflation have eased, although service inflation remains elevated. The most recent data shows a slight increase in the momentum of domestic inflation. Danske Bank expects inflation to continue declining and potentially even fall below the 2% target in 2024Q3. However, upside risks to the inflation outlook persists due to 'sticky' service inflation.
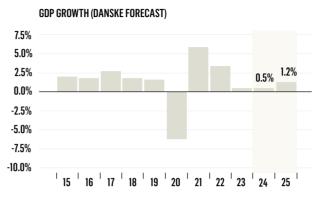
Danske Bank expects growth will gradually strengthen in 2024 as household real income rises and the credit impulse turns positive. The labour markets continue to demonstrate

strength, which, coupled with the recovering purchasing power, should set the stage for higher private consumption. However, consumers are still very cautious with spending due to low consumer confidence.

Still suffering from the previous energy crisis, the outlook for the pivotal German economy is weak. More austere fiscal policy spells headwinds, and structural issues such as 'slowbalisation' and a shrinking workforce set the scene for a weak growth outlook. Yet, some rays of light have emerged recently for the German and euro area manufacturing sector as leading indicators from Asia suggest that the global manufacturing cycle is about to turn. Thus, the worst of the German manufacturing recessions seems behind us, but Germany is unlikely to return as the euro area's economic powerhouse anytime soon.

GDP GROWTH (DANSKE FORECAST)

Source: Macrobond Financial, Danske Bank

Inflation momentum (%3m/3m SAAR)

■ Core services ■ Core goods

Source: ECB, Macrobond Financial, Danske Bank

While this economic snapshot offers a broader overview of Europe, the Omnichannel Index 2024 is firmly focused on Northern Europe, providing detailed local insights from the Benelux and the Nordics. Examining the retail sector with local perspectives is particularly intriguing, as its health affects not only the well-being of its workers but also the economy at large.

■ Consumer confidence (lhs) ■ Private consumption (rhs)

Source: Macrobond Financial, Danske Bank forecasts

Andreas Tolmark
Senior Financial Advisor

Danske Bank

METHODOLOGY

In the following, you'll learn the ins and outs of omnichannel. You'll get to know the pioneers, the trends and maybe even the immediate future of commerce. Here's how we did it.

THE TOUCHPOINTS

The Omnichannel Index examines 70 critical customer-facing touchpoints across online and in-store. It tracks the customer journey through five key phases:

Awareness
Evaluation
Purchase
Service
Loyalty

WHAT'S DIFFERENT IN 2024?

Omnichannel is dynamic in nature. Its rapid pace of change is part of what makes it so exciting to study it. New technologies constantly bring opportunities for multibrand retailers, but they also raise customer expectations.

Since our last Omnichannel Index in 2022, we've optimised the time-tested touchpoints and scrutinised new areas. Entering into a strategic partnership with Google and gaining access to their extensive insights have not only helped to improve the question framework but also secured an even higher level of ambition compared to earlier editions. This has enabled us to broaden the scope and expand our analysis to also include Belgium, Finland and The Netherlands, consolidating our efforts to move toward a broader European focus.

HOW WE CALCULATE THE SCORE

A company, market, industry or category score within different areas are always a number (between 1 and 100), with 100 being the highest possible score.

SCORE PER PHASE

The score for each phase has been calculated so that if 7 out of 14 touchpoints in a phase are answered with a 'yes' then the score would be 50. Example: (7/14 * 100 = 50)

SCORE PER DISCIPLINE

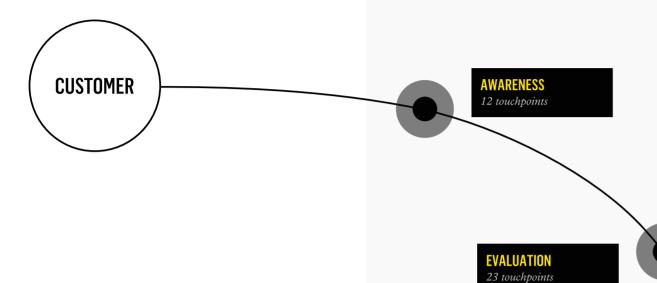The score for each discipline has been calculated so that if 4 out of 10 touchpoints in a discipline are answered with a 'yes' then the score would be 40. Example: (4/10 * 100 = 40)

TOTAL SCORE

The total score has been calculated in the same way as the score per phase and discipline. If 42 out of the 70 touchpoints have been answered with 'yes', a total score of 60 is obtained. Example: (42/70 * 100 = 60)

CUSTOMER

AWARENESS
12 touchpoints

EVALUATION
23 touchpoints

PURCHASE
11 touchpoints

SERVICE
15 touchpoints

LOYALTY
9 touchpoints

HOP ALONG THE CUSTOMER JOURNEY

The Omnichannel Index leaves no stone unturned when it comes to evaluating omnichannel performance in the Nordics, the Netherlands and Belgium. It delves into 70 crucial touchpoints across the five phases of the customer journey.

To understand the current state of commerce, the best approach is to take a walk in the customers' shoes. That's why we visited 368 stores, completed purchases and returns for all of them, both in-store and online, to gain an authentic overview of the modern customer experience.

These brand-new results show multibrand retailers how, when and where they can – and should – interact with customers to create more compelling and coherent shopping experiences.

In the following pages, we'll dive into each phase and complement them with a selection of highlighted data, showcasing impressive high scores and areas where there's room for improvement.

PHASE 01: AWARENESS

The awareness phase is when customers realise that they have a problem or a need and understand that making a purchase could solve it. At this stage, they're not yet ready to make the purchase; instead, they're researching their options.

So, how does the customer meet your brand among many others? Typically, they start with a broad search.

A customer is looking to buy a new pair of boots. They don't have a specific brand in mind, but they do have some requirements:

the boots should be waterproof, priced under €120 and come from a company with great reviews. To narrow the search down, the customer turns to Google and searches for 'Best budget waterproof boots' and 'Best winter boot brands'. They may also check social media to see what influencers and brands are sharing. If during this process your brand appears on their screen and makes a strong impression, you've nailed the awareness phase. But awareness isn't limited to online; some customers will discover your brand by visiting brick-and-mortar stores.

At this stage, multibrand retailers can help guide prospective customers towards their product by ensuring their brand awareness is as high and positive as possible. Producing engaging, trustworthy content and offering compelling in-store experiences that put your brand and products on the customer's radar can help you achieve this.

1	**Magasin** 92% DANMARK	**1**	**matas** 92% DANMARK	**2**	**Nike** 83% DANMARK

3	H&M	DENMARK	75%		3	H&M	NORWAY	75%
3	HUNKEMÖLLER	DENMARK	75%		3	IKEA	NORWAY	75%
3	IKEA	DENMARK	75%		3	JACK & JONES	NORWAY	75%
3	LEGO	DENMARK	75%		3	STOCKMANN	FINLAND	75%
3	RITUALS	DENMARK	75%		3	H&M	THE NETHERLANDS	75%
3	RITUALS	SWEDEN	75%		3	RITUALS	THE NETHERLANDS	75%
3	GINA TRICOT	NORWAY	75%					

HIGHLIGHTS

83%
work with Display Ads

53%

72%
are active on social media

ROOM FOR IMPROVEMENT

19%
use Google Inventory

59%
reach a +90 Lighthouse SEO score

CATEGORY PERFORMANCE BREAKDOWN: AWARENESS

BEAUTY & PHARMACY	53%
DEPARTMENT STORES	50%
ELECTRONICS	45%
FASHION	43%
FOOTWEAR	37%
FURNITURE & HOME INTERIOR	40%
GROCERIES	58%
HOUSE & GARDEN	39%
JEWELLERY & WATCHES	37%
KIDS	31%
PETS, GIFTS & HOBBY	42%
SPORT & LEISURE	40%

PHASE 02: EVALUATION

Having grabbed the prospective customer's attention in the awareness phase, we move onto stage two of the customer journey: Evaluation.

Evaluation is when customers begin to weigh their options. Here, brands and multibrand retailers need to meet the demand for guidance and relevant product information (videos, product demonstrations, positive reviews etc.) if they want to convince customers to add to cart.

Other deal-clinchers may include clear information on a brands and multibrand retailers website about product availability in-store, colour options, product care, returns or warranties.

If your brand fails to provide engaging content or answer a customer's questions, it's unlikely they'll move onto the next phase of the customer journey. At this stage, a customer may reach out with questions, so offering help options like live chat or FAQs is a very good idea.

The evaluation phase is about inspiring customers, building trust and delivering a frictionless experience across channels. This includes paying close attention to omnichannel. Whether customers are browsing online or in-store, they need a consistent experience.

1	IKEA		**70% SWEDEN**	**2**	hunkemöller	**65% DANMARK**	**2**	IKEA	**65% DANMARK**

2	LYKO	SWEDEN	65%	3	COOLBLUE	BELGIUM	61%
2	ELKJØP	NORWAY	65%	3	ELGIGANTEN	DENMARK	61%
2	IKEA	NORWAY	65%	3	H&M	DENMARK	61%
2	GIGANTTI	FINLAND	65%	3	SEPHORA	DENMARK	61%
2	IKEA	FINLAND	65%	3	VERKKOKAUPPA	FINLAND	61%
2	KARWEI	THE NETHERLANDS	65%	3	H&M	THE NETHERLANDS	61%

HIGHLIGHTS

74%
34%

show at least two personalised up- and cross-selling opportunities on product detail page

72%

show local inventory

ROOM FOR IMPROVEMENT

17%

offer in-store QR codes that provide extra info on products or categories

6%

score at least 60/100 on Google PageSpeed for their front, category and product pages on mobile

CATEGORY PERFORMANCE BREAKDOWN: EVALUATION

BEAUTY & PHARMACY	34%
DEPARTMENT STORES	38%
ELECTRONICS	42%
FASHION	34%
FOOTWEAR	31%
FURNITURE & HOME INTERIOR	36%
GROCERIES	31%
HOUSE & GARDEN	31%
JEWELLERY & WATCHES	32%
KIDS	28%
PETS, GIFTS & HOBBY	27%
SPORT & LEISURE	32%

PHASE 03: PURCHASE

The prospective customer has now evaluated their options and been persuaded by your offering. It's time to move onto the third stage: Purchase.

This is the moment of truth. You aren't guaranteed a sale just yet. At this moment, convenience and consistency become critical. If a customer puts an item in their cart and it disappears, they might not bother searching for it again. If they can't use their preferred payment option, they might reconsider.

Delivery fee? Well, your competitor offers free delivery, so off they go. Why should a discount code only be valid online and not in the store they're visiting? That could be a dealbreaker, too.

Even this late in the game, multibrand retailers can lose a potential customer if their purchasing options don't meet the customer's expectations. So, what should multibrand retailers be offering?

Saving shopping carts across channels, enabling gift cards as payment, allowing customers to shop directly from Instagram, offering diverse payment options and ensuring store assistants know how to check other stores for out-of-stock items. The possibilities to create a seamless shopping experience are many, and you don't want to lose a customer because you haven't connected the dots.

①	IKEA		**91% SWEDEN**	①	IKEA	**91% FINLAND**	②	IKEA	**82% BELGIUM**

2	HUNKEMÖLLER	DENMARK	82%	2	LINDEX	FINLAND	82%
2	NIKE	DENMARK	82%	2	STOCKMANN	FINLAND	82%
2	HORNBACH	SWEDEN	82%	2	GAMMA	THE NETHERLANDS	82%
2	HUNKEMÖLLER	SWEDEN	82%	2	H&M	THE NETHERLANDS	82%
2	LINDEX	SWEDEN	82%	2	KARWEI	THE NETHERLANDS	82%
2	RITUALS	SWEDEN	82%	2	HUNKEMÖLLER	THE NETHERLANDS	82%
2	IKEA	NORWAY	82%	2	NIKE	THE NETHERLANDS	82%
2	GIGANTTI	FINLAND	82%				

HIGHLIGHTS

86%

offer customers the opportunity to pay online with a mobile solution

84%

let store assistants access stock data from other stores

ROOM FOR IMPROVEMENT

4%

let customers pay for item on shopfloor with shop assistant using mPOS

53%

communicate click-and-collect or delivery to store on the Product Detail Page

CATEGORY PERFORMANCE BREAKDOWN: PURCHASE

BEAUTY & PHARMACY	56%
DEPARTMENT STORES	52%
ELECTRONICS	57%
FASHION	52%
FOOTWEAR	47%
FURNITURE & HOME INTERIOR	49%
GROCERIES	34%
HOUSE & GARDEN	48%
JEWELLERY & WATCHES	39%
KIDS	44%
PETS, GIFTS & HOBBY	44%
SPORT & LEISURE	49%

PHASE 04: SERVICE

If you thought the customer journey ended at the point of purchase, think again. Some multibrand retailers are so caught up in making the sale, they tend to forget the best way to leave a positive and lasting impression: Service.

A study from American Express found that 33% of customers will consider abandoning your brand after just one instance of poor customer service.

Excellent service is a core component of customer satisfaction. It builds brand loyalty and boosts the likelihood that the customer will come back for more.

Wherever they shop, customers want personalised and targeted experiences. That means knowing your customer's purchase history, no matter where they're shopping. Building a robust, single view of your customers helps ensure that they don't receive irrelevant communications.

Who wants repeat email reminders for an item they've already purchased?

Top off your efforts by offering customer favourites like 'buy online', 'pick-up in store' and 'buy online, return in store', 'same-day delivery' as well as digital support outside of store opening hours and speedy responses from customer service.

HIGHLIGHTS

54%
give customers access to online repair guides

51%
enable shop assistants to access customer profiles and review previous orders

ROOM FOR IMPROVEMENT

15%
offer click-and-collect or click-and-reserve within four hours as an option on Product Detail Page

31%
provide digital support outside opening hours (7 days a week, including evenings)

	1	ELGIGANTEN		1	ELON		1	ELKJOP	
		73% DENMARK			**73% SWEDEN**			**73% FINLAND**	
2	HIFI KLUBBEN	DENMARK	67%	3	ELGIGANTEN	SWEDEN	60%
2	NEYE	DENMARK	67%	3	H&M	SWEDEN	60%
2	NORRØNA	NORWAY	67%	3	HIFIKLUBBEN	SWEDEN	60%
2	GAMMA	THE NETHERLANDS	67%	3	INDISKA	SWEDEN	60%
3	A.S.ADVENTURE	BELGIUM	60%	3	INTERSPORT	SWEDEN	60%
3	KRËFEL	BELGIUM	60%	3	KAPPAHL	SWEDEN	60%
3	BR	DENMARK	60%	3	KJELL & COMPANY	SWEDEN	60%
3	BYGMA	DENMARK	60%	3	EPLEHUSET	NORWAY	60%
3	LUKSUSBABY	DENMARK	60%	3	H&M	NORWAY	60%
3	MAGASIN	DENMARK	60%	3	IKEA	NORWAY	60%
3	MATAS	DENMARK	60%	3	NETONNET	NORWAY	60%
3	PAS NORMAL	DENMARK	60%	3	NORLI	NORWAY	60%
3	PLAZA.DK	DENMARK	60%	3	VERKKOKAUPPA	FINLAND	60%
3	POWER	DENMARK	60%	3	DE BIJENKORF	THE NETHERLANDS	60%
3	CARLINGS	SWEDEN	60%	3	TOMMY HILFIGER	THE NETHERLANDS	60%
3	CERVERA	SWEDEN	60%	3	MUSTI JA MIRRI OY	FINLAND	60%
3	DRESSMANN	SWEDEN	60%				

PHASE 04: SERVICE

CATEGORY PERFORMANCE BREAKDOWN: SERVICE

BEAUTY & PHARMACY	35%
DEPARTMENT STORES	39%
ELECTRONICS	52%
FASHION	38%
FOOTWEAR	35%
FURNITURE & HOME INTERIOR	40%
GROCERIES	34%
HOUSE & GARDEN	40%
JEWELLERY & WATCHES	31%
KIDS	38%
PETS, GIFTS & HOBBY	29%
SPORT & LEISURE	41%

PHASE 05: LOYALTY

While loyalty is the final step of the customer journey, it's often the first item on most multibrand retailers' and brands' wish lists.

If you've made it this far, you're well on your way to building long-term relationships with your customers. Loyal customers are good customers and retaining them is much cheaper than acquiring new ones (a new customer costs five times as much as an existing one – you do the math!).

Across every industry, loyalty is the key area that distinguishes top performers from low performers. This includes not just loyalty club programmes with benefits but all aspects of loyalty.

Even so, many multibrand retailers underestimate the business value of loyalty, content with offering limited-value loyalty clubs or occasional discount codes. But truly connecting with your customers and consistently providing tangible value is the best way to turn them into your biggest assets.

This connection requires harnessing your customers' data and using it to enhance the online and in-store shopping experiences you offer them. From money-off offers on their birthdays to extended warranty periods and exclusive member-only benefits, striking the right balance will keep them coming back – and spreading the word.

HIGHLIGHTS

77%
promote newsletter or loyalty club at checkout

66%
offer monetary benefits for loyalty club members

ROOM FOR IMPROVEMENT

17%
send automated emails based on website behaviour within 48 hours
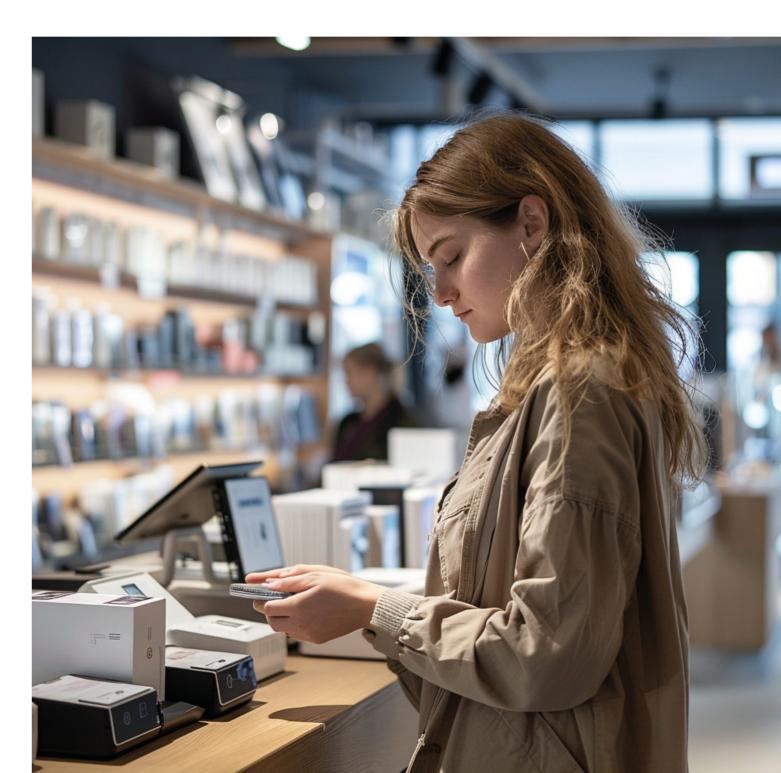
20%
ship from store

1	**DECATHLON** 89% THE NETHERLANDS		

1	H&M	SWEDEN	89%
1	KAPPAHL	SWEDEN	89%
1	ELKJØP	NORWAY	89%
1	NIKE	THE NETHERLANDS	89%
2	PANDORA	DENMARK	78%
2	SALLING	DENMARK	78%
2	NIKE	DENMARK	78%
2	IKEA	SWEDEN	78%
2	LINDEX	SWEDEN	78%
2	NETONNET	SWEDEN	78%
2	PEAK PERFORMANCE	SWEDEN	78%
2	APOTEK1	NORWAY	78%

1	**ONLY** 89% DENMARK		

1	**SEPHORA** 89% DENMARK		

2	EUROPRIS	NORWAY	78%
2	FARGERIKE	NORWAY	78%
2	GIGANTTI	FINLAND	78%
2	IKEA	FINLAND	78%
2	STOCKMANN	FINLAND	78%
2	G-STAR RAW	THE NETHERLANDS	78%
2	H&M	THE NETHERLANDS	78%
2	ICI PARIS XL	THE NETHERLANDS	78%
2	IKEA	THE NETHERLANDS	78%
2	KARWEI	THE NETHERLANDS	78%
2	DOUGLAS	THE NETHERLANDS	78%

PHASE 05: LOYALTY

CATEGORY PERFORMANCE BREAKDOWN: LOYALTY

BEAUTY & PHARMACY	61%
DEPARTMENT STORES	56%
ELECTRONICS	46%
FASHION	51%
FOOTWEAR	45%
FURNITURE & HOME INTERIOR	37%
GROCERIES	58%
HOUSE & GARDEN	41%
JEWELLERY & WATCHES	41%
KIDS	44%
PETS, GIFTS & HOBBY	41%
SPORT & LEISURE	44%

COUNTRIES

COUNTRIES

Next, we're naming the top three country winners in Belgium, Denmark, Sweden, Norway, The Netherlands and Finland. Some retailers are recurring performers from the previous Omnichannel Index, others are newcomers. You might also see some surprises alongside the big brand names, proving omnichannel excellence isn't just for retail giants.

BELGIUM

The surveyed Belgian brands and multibrand retailers are better than the index at building loyalty through their customer loyalty clubs. Similarly to their Dutch neighbours, they place a stronger focus on consumer apps and, consequently, score above the index average in this discipline. It's also in Belgium we see the highest scores on sustainability and compliance.

Alongside Norway, Belgian consumers are, however, reporting the most challenges with their online shopping experience, with a staggering 57% having experienced pain points in their latest shopping journey.

HIGHLIGHTS

80%

offer online purchasing with in-store returns

72%

recruit customers verbally for the customer club or newsletter at the cashier

ROOM FOR IMPROVEMENT

24%

answer email inquiries within four hours

16%

show personalised product recommendation on home page

Top Performers

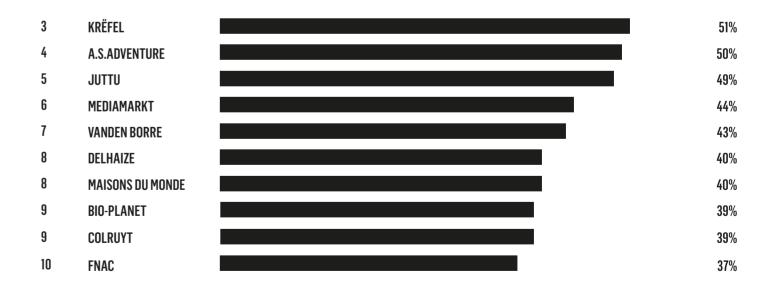| 1	**DECATHLON**	2	**IKEA**	2	**coolblue**
	63%		**59%**		**59%**

Decathlon leads the pack in Belgium across four key disciplines, excelling in customer data management, omnichannel integration, loyalty programmes, and sustainability initiatives. Their adept use of CRM and customer data helps create engaging content, fostering a strong community around the brand.

IKEA, our runner-up, provides an informative and inspiring customer journey. They excel in UX optimisation, personalisation and ensuring safe navigation. Their app offers unique services, fostering strong customer loyalty.
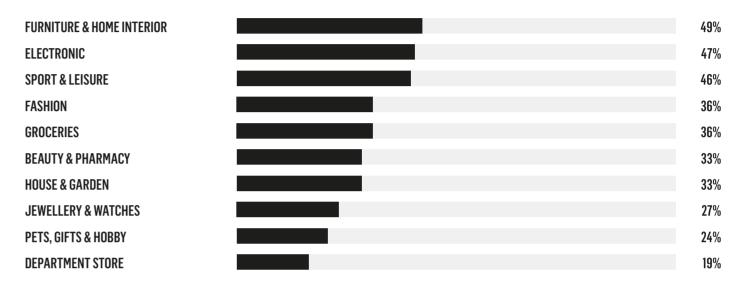
Coolblue stands out for its omnichannel maturity, particularly in app development. They lead in digital marketing and UX best practices, effectively leveraging product data and user-generated content to provide guided experiences.

3	KRËFEL		51%
4	A.S.ADVENTURE		50%
5	JUTTU		49%
6	MEDIAMARKT		44%
7	VANDEN BORRE		43%
8	DELHAIZE		40%
8	MAISONS DU MONDE		40%
9	BIO-PLANET		39%
9	COLRUYT		39%
10	FNAC		37%

BELGIUM

Category Performance Breakdown: Belgium

FURNITURE & HOME INTERIOR	49%
ELECTRONIC	47%
SPORT & LEISURE	46%
FASHION	36%
GROCERIES	36%
BEAUTY & PHARMACY	33%
HOUSE & GARDEN	33%
JEWELLERY & WATCHES	27%
PETS, GIFTS & HOBBY	24%
DEPARTMENT STORE	19%

Google Smart Shopper Research, 2023: Consumer Expectations and Behaviour in Belgium

45% vs. **55%**
Online vs. Offline Purchase split

57%
Do online research

59%
Channel agnostic byuers who are not fully set on one channel

57%
Experience online pain points during their shopping journey

DENMARK

According to data from Google, Danish consumers exhibit a high degree of loyalty towards specific brands as opposed to multibrand options. They are also among the most digital in their shopping behaviour, with 60% of Danish consumers being channel agnostic (i.e. they don't necessarily care if a brand has gotten their attention through one channel or another) and 61% conduct research prior to a purchase.

This contrasts with Danish brands and multibrand retailers having the second-lowest consumer rating for the shopping experience, with no less than 54% of consumers encountering online pain points during their latest shopping journey, leaving plenty of room for improvement.

HIGHLIGHTS

94%

offer various mobile solutions for online payment

70%

offer online up- and cross selling in mini-basket or basket

ROOM FOR IMPROVEMENT

10%

offer same-day delivery in cities with high populations

8%

show visual user-generated content on Product Detail Page

Top Performers

| 1 | matas 66% | 2 | IKEA 64% | 3 | ELGIGANTEN 61% |

The Danish winner, Matas, continues to lead the market in digital marketing and the ability to collect and activate customer data. Matas creates smooth and seamless buying experiences while building community around their brand through their customer club.

The runner up, IKEA, has a unique ability to create an informative and inspiring evaluation process. They use their app diligently to maintain contact with customers and foster strong user loyalty. They also provide flexible payment options in their stores and online. Their use of digital in-store tools to help staff assist customers also stands out.
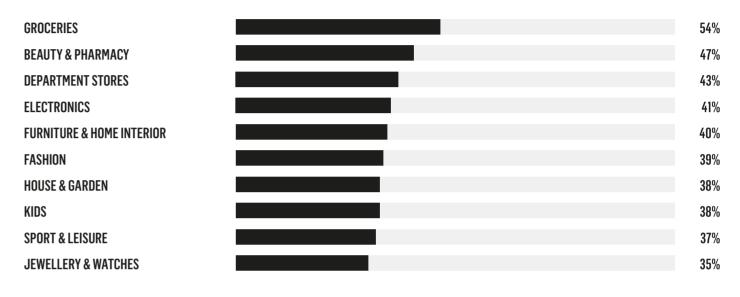
Coming in third, Elgiganten, excels in handling stock, orders and fulfillment. They provide stellar customer service and demonstrate a commitment to sustainability through re-commerce. They consistently meet customer expectations and leverage their innovative corporate mindset to set new standards for the industry.

3	HUNKEMÖLLER	61%
3	ELGIGANTEN	61%
4	NIKE	60%
4	SEPHORA	60%
5	MAGASIN	59%
6	NEYE	56%
7	JOHANNES FOG	54%
7	BILKA	54%
8	IMERCO	51%
9	ZIZZI	50%
9	HIFI KLUBBEN	50%
10	SPORT 24	49%
10	JACK & JONES	49%
10	POWER	49%
10	RITUALS	49%

DENMARK

Category Performance Breakdown: Denmark

Category	Value
GROCERIES	54%
BEAUTY & PHARMACY	47%
DEPARTMENT STORES	43%
ELECTRONICS	41%
FURNITURE & HOME INTERIOR	40%
FASHION	39%
HOUSE & GARDEN	38%
KIDS	38%
SPORT & LEISURE	37%
JEWELLERY & WATCHES	35%

Google Smart Shopper Research, 2023: Consumer Expectations and Behaviour in Denmark

47% vs. 53%
Online vs. Offline Purchase split

31%
Research online and purchase offline

60%
Channel agnostic byuers who are not fully set on one channel

54%
Experience online pain points during their shopping journey

SWEDEN

Swedish consumers are highly channel agnostic with 61% being omnichannel shoppers and 61% doing research online. The shopping experience in Sweden outperforms the other five countries covered in this index – with only 49% having encountered online pain points during their latest shopping journey.

While the UX practices tend to score high, offering consumer apps doesn't seem to be a priority for Swedish retailers and brands with only 24% scoring well. This means that many Swedish retailers and brands are missing out on valuable opportunities to build loyalty.

Furthermore, we see gaps in terms of data for live inventory and fulfillment, particularly related to showing in-store product availability throughout the journey, offering a single view of stock and orders as well as ensuring flexible and speedy pickup and delivery options.

Swedish brands and retailers are more mature on 'buy now, pay later' and way ahead on integrated payment solutions – largely owing to the success of Klarna.

HIGHLIGHTS

93%

offer "buy now, pay later online"

71%

can access your profile and omni order history in-store

ROOM FOR IMPROVEMENT

42%

communicate "click-and-collect" and "delivery to store" options on Product Detail Page

15%

enable better in-store experience through the app

Top Performers

1	IKEA	66%
2	H&M	64%
3	ELGIGANTEN	60%

The country winner, IKEA, stands out on multiple fronts. Thanks to their single view of data, they excel in optimising UX, personalisation and safe navigation through the customer journey.

They also produce great ads and provide flexible payment options in their stores and online. They use their app and customer club to maintain contact with customers and foster strong loyalty. IKEA also shows a clear commitment to sustainability through a host of initiatives.

The runner-up, H&M, offers an amazing app and makes the most of CRM to welcome customers into their customer club which effectively builds a community around the brand. H&M also promotes circular initiatives, such as re-commerce, and are committed to sustainability with goals verified by the Science Based Targets Initiative.
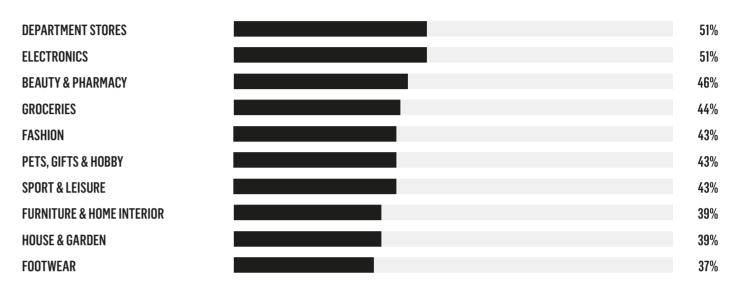
Elgiganten, in third place, is the only retailer in the Swedish top 3 that doesn't offer an app. What gets them into third place is their second-to-none stock data, fulfillment and logistics, coupled with great loyalty benefits, technical maturity, inspiring marketing content and the ability to keep dead stock to an absolute minimum – a key component if you are to succeed in the electronics sector.
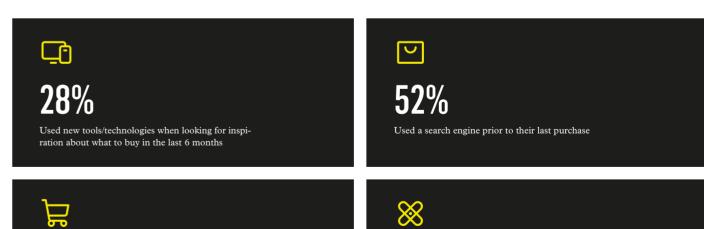
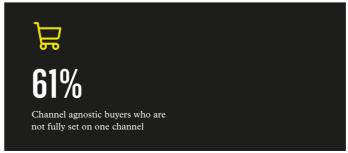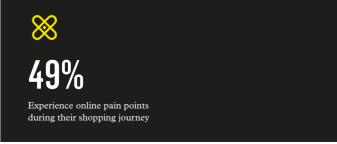|		
4	KAPPAHL	59%
5	JULA	57%
6	HORNBACH	56%
6	HUNKEMÖLLER	56%
6	KJELL & COMPANY	56%
6	NETONNET	56%
7	LINDEX	54%
8	CERVERA	53%
8	LYKO	53%
9	PEAK PERFORMANCE	51%
9	XXL SPORT	51%
9	ARKENZOO.SE	51%
9	BIK BOK	51%
9	CUBUS	51%
9	VOLT	51%
9	INETDATA	51%
9	ÅHLÉNS	51%
10	CLAS OHLSON	50%
10	CARLINGS	50%
10	KRONANSAPOTEK	50%
10	RITUALS	50%

SWEDEN

Category Performance Breakdown: Sweden

DEPARTMENT STORES	51%
ELECTRONICS	51%
BEAUTY & PHARMACY	46%
GROCERIES	44%
FASHION	43%
PETS, GIFTS & HOBBY	43%
SPORT & LEISURE	43%
FURNITURE & HOME INTERIOR	39%
HOUSE & GARDEN	39%
FOOTWEAR	37%

Google Smart Shopper Research, 2023: Consumer Expectations and Behaviour in Sweden

28%
Used new tools/technologies when looking for inspiration about what to buy in the last 6 months

52%
Used a search engine prior to their last purchase

61%
Channel agnostic buyers who are not fully set on one channel

49%
Experience online pain points during their shopping journey

NORWAY

Norway stands out from the other countries we cover. It generally performs better on omni services, especially in click-and-collect, possibly due to Norway's demanding geography. In general, Norway seems less mature on CRM and their performance is more fractured. This should, in turn, point Norwegian brands and multibrand retailers towards a true goldmine of opportunities.

Overall, Norwegian consumers are less channel agnostic than their Nordic neighbours but conduct more online research before making

a purchase (63%) – again, probably due to the geography and vast distances in the country. Combine that with the lowest consumer rating of the shopping experiences (57% have encountered online pain points during their latest shopping journey), and some massive opportunities for Norwegian brands and multibrand retailers begin to emerge.

Norwegian multibrand retailers and brands have demonstrated excellent use of various digital marketing channels for omnichannel commerce. Additionally, they excel in stock

data integration, ensuring in-store product availability throughout the customer journey and providing a single view of stock and orders. However, despite these strengths, three disciplines reveal areas for improvement:

HIGHLIGHTS

68%
communicate "click-and-collect" and "delivery to store" options on Product Detail Page

73%
answer email inquiries within four hours

ROOM FOR IMPROVEMENT

26%
recruit to loyalty club or newsletter online

13%
offer "click-and-collect" or "click-and-reserve" within four hours on Product Detail Page

Top Performers

1 — IKEA — **69%**	2 — ELKJØP — **64%**	3 — H&M — **56%**

The Norwegian winner, IKEA, stands out on multiple fronts. Their app provides great customer value, and they use it diligently to maintain contact with customers. Thanks to their single view of data, they excel in optimising UX, personalisation and safe navigation through the customer journey. They outperform their Swedish peers in digital marketing, content creation and service delivery. Additionally, they succeed with ads and provide excellent payment options both in stores and online.

Elkjøp, in second place, is the only retailer in the Norwegian top 3 that doesn't offer an app. What puts them in second place is their technical maturity and second-to-none stock data, fulfillment and logistics. These two factors, coupled with great loyalty benefits, inspiring marketing content and the ability to keep dead stock to an absolute minimum, place Elkjøp near the top in Norway.
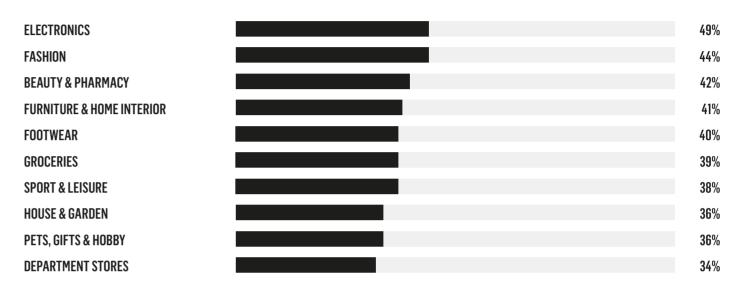
In third place, H&M, knows how to harness customer data, provide excellent customer service and execute amazing digital marketing. They offer an outstanding app and effectively utilise CRM to welcome customers into a state-of-the-art customer club that fosters loyalty. H&M also promotes circular initiatives, such as re-commerce, and is committed to sustainability with goals verified by the Science Based Targets Initiative.

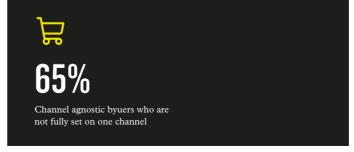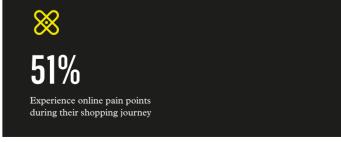| Rank	Retailer	Score
4	OBS BYGG	53%
5	NORLI	50%
5	JULA	50%
5	CUBUS	50%
5	LINDEX	50%
5	NETONNET	50%
6	XXL SPORT	49%
6	KID INTERIØR	49%
6	KAPPAHL	49%
6	POWER	49%
6	KICKS	49%
7	FARGERIKE	47%
7	CARLINGS	47%
7	ELEKTROIMPORTØREN	47%
8	BILTEMA	46%
8	NORRØNA	46%
8	BOHUS	46%
8	APOTEK1	46%
9	SKEIDAR	44%
9	GINA TRICOT	44%
9	EPLEHUSET	44%
10	MEGAFLIS	43%
10	KITCH'N	43%
10	PRINCESS	43%
10	DRESSMANN	43%
10	JACK & JONES	43%

NORWAY

Category Performance Breakdown: Norway

ELECTRONICS	49%
FASHION	44%
BEAUTY & PHARMACY	42%
FURNITURE & HOME INTERIOR	41%
FOOTWEAR	40%
GROCERIES	39%
SPORT & LEISURE	38%
HOUSE & GARDEN	36%
PETS, GIFTS & HOBBY	36%
DEPARTMENT STORES	34%

Google Smart Shopper Research, 2023: Consumer Expectations and Behaviour in Norway

41% vs. **59%**
Online vs. Offline purchase split

36%
Do online research

65%
Channel agnostic byuers who are not fully set on one channel

51%
Experience online pain points during their shopping journey

THE NETHERLANDS

The Netherlands demonstrate a high maturity level in loyalty programs, scoring above the index. However, when it comes to leveraging customer data, Dutch sites generally perform below the index, particularly in areas such as site speed load and SEO Lighthouse score. These factors highlight clear opportunities for improvement for Dutch multibrand retailers and brands.

Dutch multibrand retailers and brands have shown great use of the various digital marketing channels for omnichannel commerce purposes, along with higher scores in the use of CRM and customer data – achieving a score of 54% compared to the index average of 46%. This stellar performance is particularly attributed to how they activate data and communicate based on customer needs and behaviour. Furthermore, the use of the consumer app also ranks highest in this index.

Top Performers

| 1 | **KARWEI** 67% | 2 | **H&M** 66% | 3 | **gamma** 64% |

Karwei's digital maturity is staggering and very few players can match their technical performance. When it comes to app and marketing, they score 100%. They produce inspiring ads and spread them out across the customer journey. They accurately show availability and respond quickly to customer service inquiries. Additionally, they excel in site performance and load times, and offer flexibility with delivery and pick-up options.

H&M, coming in second, clearly knows how to harness customer data, provide excellent customer service and amazing digital marketing. Their high level of maturity on customer service sets them apart, and they're even better in UX and digital marketing than their Swedish peers. They offer an amazing app and know how to make the most of CRM to welcome customers into a state-of-the-art customer club that fosters loyalty.

Coming in third, GAMMA can pride themselves on being the best in the entire index when it comes to technical performance. GAMMA excels at managing their stock data. They do CRM and customer data well, prioritise customer loyalty and excel in the purchase phase, making it easy to convert.
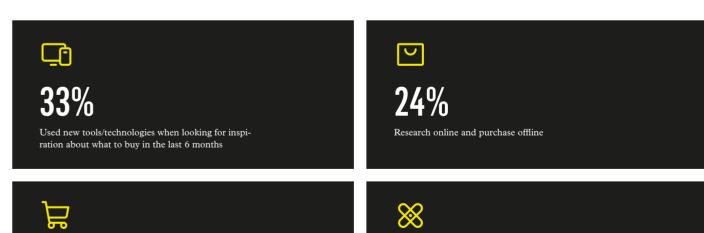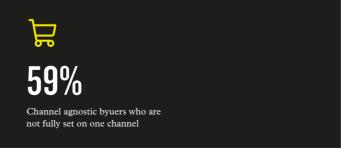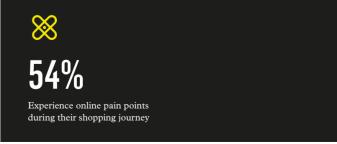
HIGHLIGHTS

57%

54%

88%
active on new and visual SoMe platforms

83%
offer online purchasing with in-store returns

ROOM FOR IMPROVEMENT

8%
offer "buy now, pay later" in-store

6%
offer same-day delivery in cities with high populations

4	IKEA	60%
5	NIKE	57%
6	DE BIJENKORF	54%
6	ICI PARIS XL	54%
7	DOUGLAS	53%
8	COOLBLUE	51%
9	HUNKEMÖLLER	50%
9	HEMA	50%
10	BLOKKER	49%
10	OMODA	49%

THE NETHERLANDS

Category Performance Breakdown: The Netherlands

DEPARTMENT STORES		52%
HOUSE & GARDEN		47%
BEAUTY & PHARMACY		44%
FASHION		43%
FOOTWEAR		40%
SPORT & LEISURE		40%
ELECTRONICS		39%
FURNITURE & HOME INTERIOR		36%
GROCERIES		35%
PETS, GIFTS & HOBBY		22%

Google Smart Shopper Research, 2023: Consumer Expectations and Behaviour in The Netherlands

33%
Used new tools/technologies when looking for inspiration about what to buy in the last 6 months

24%
Research online and purchase offline

59%
Channel agnostic byuers who are not fully set on one channel

54%
Experience online pain points during their shopping journey

FINLAND

Finnish consumers are among the most digital in their shopping behaviour, with 65% of Finnish consumers being channel agnostic (i.e. they don't necessarily care if a brand has gotten their attention through one channel or another). Given that 51% have encountered online pain points during their latest shopping journey, there's quite some room for improvement for Finnish brands and multibrand retailers.

Finnish brands and multibrand retailers score particularly high on customer service and in-store support – making it easy for sales associates to use digital assets in-store to provide a seamless experience to customers. They also score above the index on their UX Best Practices, coming in at 59% compared to the index average at 48%.

HIGHLIGHTS

73%

offer "click-and-collect" or "delivery to store" at checkout

71%

show at least two personalised up- and cross-selling opportunities on Product Detail Page

ROOM FOR IMPROVEMENT

25%

use in-store QR codes to provide customers with extra product information

13%

promote or advertise the app to drive customer installations

Top Performers

1	GIGANTTI	70%
2	IKEA	67%
3	STOCKMANN	60%

Gigantti is the only retailer in the Finnish top 3 that doesn't offer an app. What gets them to the top is their second-to-none stock data, fulfillment and logistics, coupled with great loyalty benefits, technical maturity, inspiring marketing content and the ability to keep dead stock to an absolute minimum.

IKEA excel in optimising UX and personalisation. They produce great ads, utilise data effectively and provide great payment options both in stores and online. They master loyalty – through the one-of-a-kind customer club, IKEA Family – and show a clear commitment to sustainability through ambitious initiatives.

In the entire index, no one can compete with Stockmann on UX. Compared to competitors within the Department Store category, Stockmann demonstrates maturity in omni-channel strategies. They run a great loyalty programme and offer a highly personalised experience, with a smooth-running website that features sought-after wishlists and reserve-in-store options.

4	LINDEX	59%
5	VERKKOKAUPPA	53%
6	S-KAUPAT	51%
7	MUSTI JA MIRRI OY	50%
8	TOKMANNI	49%
9	K-RAUTA	44%
10	MARIMEKKO OYJ	43%

FINLAND

Category Performance Breakdown: Finland

ELECTRONICS	62%
DEPARTMENT STORES	55%
GROCERIES	51%
PETS, GIFTS & HOBBY	45%
FASHION	42%
SPORT & LEISURE	38%
FURNITURE & HOME INTERIOR	37%
HOUSE & GARDEN	36%

Google Smart Shopper Research, 2023: Consumer Expectations and Behaviour in Finland

41% vs. 50%
Online vs. Offline purchase split

36%
Research online and purchase offline

65%
Channel agnostic byuers who are
not fully set on one channel

51%
Experience online pain points
during their shopping journey

CATEGORIES

CATEGORIES

Next, we reveal the top three winners within each category. Each category has a different approach and level of omnichannel maturity, so we're comparing like-for-like in this section. Taken as a whole, though, Electronics comes in first place with the overall highest average score. Hot on its heels come Department Stores, followed closely by Pharma and Beauty.

In this section we have also highlighted a number of touchpoints, that are particularly relevant and interesting within each for phase for the specific category.

Intrigued? Compare your own score to the frontrunners in your category.

ELECTRONICS

Electronics multibrand retailers stand out in several disciplines, especially when it comes to stock data accuracy online and offline, as well as fulfillment flexibility compared to the rest of the index. They are one of the few categories offering 'click-and-collect' or 'delivery to store' in 97% of cases. Likewise, 97% can tell you if an item is available in another local store.

They also achieve the highest scores in terms of UX. Lastly, customer service and in-store support beat the rest of the categories. It's easy for the in-store staff to place an order to be shipped to a home address or alternative store.

Top performers

1	**GIGANTTI** 70% FINLAND		2	**ELKJØP** 64% NORWAY		3	**ELGIGANTEN** 61% DENMARK

The three spots in the Electronics category are dominated by a single company, Elkjøp Nordic. It astands out as the only multibrand retailer among the top performers that doesn't offer an app.

However, their exceptional performance in stock data, fulfillment and logistics secures their dominance. They excel in loyalty benefits and their technical maturity is evident in their operations.

Overall, their combination of robust stock management (and the crucial ability to minimise dead stock), loyalty programmes, technical maturity as well as effective and inspiring marketing efforts solidifies their position as a key player in the Electronics category.

4	ELGIGANTEN	SWEDEN	60%
5	COOLBLUE	BELGIUM	59%
6	KJELL & COMPANY	SWEDEN	56%
6	NETONNET	SWEDEN	56%
7	VERKKOKAUPPA	FINLAND	53%
8	KRËFEL	BELGIUM	51%
8	INETDATA	SWEDEN	51%

8	COOLBLUE	THE NETHERLANDS	51%
9	HIFI KLUBBEN	DENMARK	50%
9	NETONNET	NORWAY	50%
10	POWER	DENMARK	49%
10	ELON	SWEDEN	49%
10	POWER	NORWAY	49%

ELECTRONICS

Phase 01: Awareness

42% USE GOOGLE LOCAL INVENTORY SHOPPING ADS.

58% REACH +90 SEO SCORE AT LIGHTHOUSE.

Phase 02: Evaluation

42% USE IN-STORE QR CODES PROVIDING EXTRA INFO ON PRODUCTS OR CATEGORIES.

94% SHOW ON PDP IF AN ITEM IS AVAILABLE IN LOCAL STORE.

77% SHOW CUSTOMER REVIEWS ON PRODUCT LEVEL.

3% REACH A GOOGLE PAGE SPEED OF 60/100 ON FP, PLP AND PDP FROM MOBILE.

16% USE BEHAVIOUR-BASED SEARCH FUNCTION ON WEBSITE (PERSON-ALISED/OPTIMISED).

26% REACH A GOOGLE ACCESSIBILITY SCORE OF 90/100 ON FP, PLP AND PDP FROM MOBILE.

65% CHAT WITH STORE STAFF TO GET PRODUCT ADVICE.

52% SELL REPAIRED OR REFURBISHED PRODUCTS.

0% SHOW ENVIRONMENTAL FOOT-PRINT OF PRODUCTS ON PDP.

77% SHOW AT LEAST TWO PERSON-ALISED UP- AND CROSS-SELLING OPPORTUNITIES ON PDP.

Phase 03: Purchase

65% USE ONLINE UP- AND CROSS SELL-ING IN MINI-BASKET OR BASKET.

55% STORE THE CUSTOMER'S BASKET ACROSS DEVICES FOR SEAMLESS SHOPPING WITH OMNIBASKET.

10% PAY FOR AN ITEM ON SHOP FLOOR WITH A SHOP ASSISTANT (MOBILE POS).

90% MAKE STAFF DO AN ONLINE ORDER AND SHIP TO HOME ADDRESS/TO STORE.

61% OFFER "BUY NOW, PAY LATER" ONLINE.

Phase 04: Service

45% OFFER CLICK & COLLECT OR CLICK & RESERVE WITHIN 4 HOURS ON PDP.

52% ANSWER EMAIL INQUIRIES WITHIN 4 HOURS.

81% GET ORDER HISTORY ON MY PROFILE BY ASKING A SHOP ASSISTANT IN-STORE.

10% OFFER SHIPPING CHOICES BASED ON CLIMATE-FRIENDLY "BEST CHOICE" OPTIONS.

19% PROVIDE EXTENDED WARRANTY.

Phase 05: Loyalty

32% OFFER CUSTOMER APP ON APP STORE OR GOOGLE PLAY.

77% OFFER REGISTRATION NEWSLET-TER OR LOYALTY CLUB DURING CHECKOUT.

10% SEND AUTOMATED EMAILS BASED ON WEBSITE BEHAVIOUR WITHIN 48 HOURS (E.G., ABANDONED BAS-KET OR ABANDONED BROWSE).

48% RECRUIT CUSTOMERS VERBALLY FOR THE CUSTOMER CLUB OR NEWSLETTER, OR DISPLAY A SIGN AT THE CASHIER.

71% NEUTRAL CONSENT BANNER IN PLACE (COOKIE COMPLIANT).

DEPARTMENT STORES

Department stores demonstrate strong results in the adoption of digital marketing methods but lag behind in other aspects of the customer experience. However, one of the areas where they perform really well is the ability (in 100% of cases) to store the customer's basket across devices for seamless shopping. Historically, department stores have lagged behind in omnichannel efforts, but these three players are certainly stepping up their game.

Top performers

1	**STOCKMANN**	2	*Magasin*	3	**de Bijenkorf**
	60% FINLAND		**59% DENMARK**		**54% THE NETHERLANDS**

Stockmann leads the way in UX across the entire index. Within the department store category, Stockmann demonstrates maturity in omnichannel strategies. They offer a remarkable loyalty programme and provide a highly personalised experience. Their website runs smoothly, featuring sought-after options such as 'wishlists' and 'reserve in store'.

Magasin excels in the awareness phase and digital marketing discipline, ensuring organic growth through search and inspiring advertisements. They're adept at recruiting subscribers for newsletters and customer club and offer various loyalty benefits.

De Bijenkorf focuses on creating single view of customer. They're getting customer service right, offering quick response times and, in general, ensuring easy accessibility. They're also good with digital marketing, specifically when it comes to using inspiring and relevant ads throughout the entire customer journey.

4	ÅHLÉNS	SWEDEN	51%	8	ILLUMS BOLIGHUS	DENMARK	34%
5	HEMA	THE NETHERLANDS	50%	8	SPAR KJØP	NORWAY	34%
6	TOKMANNI	FINLAND	49%	9	INNO	BELGIUM	19%
7	SALLING	DENMARK	37%				

DEPARTMENT STORES

Phase 01: Awareness

80% WORK WITH DISPLAY ADS.

30% USE GOOGLE LOCAL INVENTORY SHOPPING ADS.

70% REACH +90 SEO SCORE AT LIGHTHOUSE.

Phase 02: Evaluation

80% SHOW ON PDP IF AN ITEM IS AVAILABLE IN LOCAL STORE.

40% SHOW CUSTOMER REVIEWS ON PRODUCT LEVEL.

10% REACH A GOOGLE PAGE SPEED OF 60/100 ON FP, PLP AND PDP FROM MOBILE.

20% USE BEHAVIOUR-BASED SEARCH FUNCTION ON WEBSITE (PERSONALISED/OPTIMISED).

40% SHOW PERSONALISED PRODUCT RECOMMENDATION ON HOMEPAGE.

10% REACH A GOOGLE ACCESSIBILITY SCORE OF 90/100 ON FP, PLP AND PDP FROM MOBILE.

0% INCORPORATE SPECIAL APP FEATURES FOR EASIER SHOPPING EVALUATION AND DECISION-MAKING (VISUAL SEARCH, OBJECT RECOGNITION, AND AUGMENTED REALITY).

0% SHOW ENVIRONMENTAL FOOTPRINT OF PRODUCTS ON PDP.

80% SHOW AT LEAST TWO PERSONALISED UP- AND CROSS-SELLING OPPORTUNITIES ON PDP.

Phase 03: Purchase

100% STORE THE CUSTOMER'S BASKET ACROSS DEVICES FOR SEAMLESS SHOPPING WITH OMNIBASKET.

0% PAY FOR AN ITEM ON SHOP FLOOR WITH A SHOP ASSISTANT (MOBILE POS).

50% MAKE STAFF DO AN ONLINE ORDER AND SHIP TO HOME ADDRESS/TO STORE.

Phase 04: Service

60% OFFER CLICK & COLLECT OR DELIVERY TO STORE IN CHECKOUT.

40% ANSWER EMAIL INQUIRIES WITHIN 4 HOURS.

10% OFFER SAME-DAY DELIVERY IN HIGH POPULATION CITIES.

30% GET ORDER HISTORY ON MY PROFILE BY ASKING A SHOP ASSISTANT IN-STORE.

30% SHIP FROM STORE.

Phase 05: Loyalty

60% OFFER CUSTOMER APP ON APP STORE OR GOOGLE PLAY.

90% OFFER REGISTRATION NEWSLETTER OR LOYALTY CLUB DURING CHECKOUT.

10% SEND AUTOMATED EMAILS BASED ON WEBSITE BEHAVIOUR WITHIN 48 HOURS (E.G., ABANDONED BASKET OR ABANDONED BROWSE).

60% RECRUIT CUSTOMERS VERBALLY FOR THE CUSTOMER CLUB OR NEWSLETTER, OR DISPLAY A SIGN AT THE CASHIER.

60% NEUTRAL CONSENT BANNER IN PLACE (COOKIE COMPLIANT).

10% PROMOTE SECOND HAND SHOPPING ONLINE.

FASHION

Fashion multibrand retailers and brands understand, like no other category, the importance and use of digital channels across all platforms, from Google to Meta to TikTok. Particularly, the link to fashion product ads across all platforms is being used by 90% of all fashion play-ers. Their online mobile payment inte-grations (95% of the players) are also a clear sign of how seamlessly and con-veniently they manage to support and round up the purchase phase.

Top performers

| 1 | H&M 66% THE NETHERLANDS | 2 | H&M 64% SWEDEN | 3 | H&M 61% DENMARK |

H&M is leading the pack in the Fashion category. H&M sets the bar high with their expert grasp on customer data and remarkable digital marketing strategies.

Combined with exceptional maturity in customer services, an outstanding app and CRM utilisation that drives a cut-ting-edge customer club that fosters un-wavering loyalty, H&M is clearly taking the lead in the fashion category.

3	HUNKEMÖLLER	DENMARK	61%	9	BIK BOK	SWEDEN	51%
4	NIKE	DENMARK	60%	9	CUBUS	SWEDEN	51%
5	KAPPAHL	SWEDEN	59%	9	VOLT	SWEDEN	51%
5	LINDEX	FINLAND	59%	10	ZIZZI	DENMARK	50%
6	NIKE	THE NETHERLANDS	57%	10	CARLINGS	SWEDEN	50%
7	NEYE	DENMARK	56%	10	CUBUS	NORWAY	50%
7	HUNKEMÖLLER	SWEDEN	56%	10	LINDEX	NORWAY	50%
7	H&M	NORWAY	56%	10	HUNKEMÖLLER	NETHERLANDS	50%
8	LINDEX	SWEDEN	54%				

FASHION

Phase 01: Awareness

78% WORK WITH DISPLAY ADS.

16% USE GOOGLE LOCAL INVENTORY SHOPPING ADS.

64% REACH +90 SEO SCORE AT LIGHTHOUSE.

Phase 02: Evaluation

59% SHOW ON PDP IF AN ITEM IS AVAILABLE IN LOCAL STORE.

33% SHOW CUSTOMER REVIEWS ON PRODUCT LEVEL.

13% REACH A GOOGLE PAGE SPEED OF 60/100 ON FP, PLP AND PDP FROM MOBILE.

13% USE BEHAVIOUR-BASED SEARCH FUNCTION ON WEBSITE (PERSONALISED/OPTIMISED).

13% SHOW PERSONALISED PRODUCT RECOMMENDATION ON HOMEPAGE.

32% REACH A GOOGLE ACCESSIBILITY SCORE OF 90/100 ON FP, PLP AND PDP FROM MOBILE.

15% INCORPORATE SPECIAL APP FEATURES FOR EASIER SHOPPING EVALUATION AND DECISION-MAKING (VISUAL SEARCH, OBJECT RECOGNITION, AND AUGMENTED REALITY).

0% SHOW ENVIRONMENTAL FOOTPRINT OF PRODUCTS ON PDP.

82% SHOW AT LEAST TWO PERSONALISED UP- AND CROSS-SELLING OPPORTUNITIES ON PDP.

Phase 03: Purchase

71% STORE THE CUSTOMER'S BASKET ACROSS DEVICES FOR SEAMLESS SHOPPING WITH OMNIBASKET.

4% PAY FOR AN ITEM ON SHOP FLOOR WITH A SHOP ASSISTANT (MOBILE POS).

59% MAKE STAFF DO AN ONLINE ORDER AND SHIP TO HOME ADDRESS/TO STORE.

Phase 04: Service

63% OFFER CLICK & COLLECT OR DELIVERY TO STORE IN CHECKOUT.

57% ANSWER EMAIL INQUIRIES WITHIN 4 HOURS.

3% OFFER SAME-DAY DELIVERY IN HIGH POPULATION CITIES.

49% GET ORDER HISTORY ON MY PROFILE BY ASKING A SHOP ASSISTANT IN-STORE.

16% SHIP FROM STORE.

Phase 05: Loyalty

31% OFFER CUSTOMER APP ON APP STORE OR GOOGLE PLAY.

80% OFFER REGISTRATION NEWSLETTER OR LOYALTY CLUB DURING CHECKOUT.

19% SEND AUTOMATED EMAILS BASED ON WEBSITE BEHAVIOUR WITHIN 48 HOURS (E.G., ABANDONED BASKET OR ABANDONED BROWSE).

64% RECRUIT CUSTOMERS VERBALLY FOR THE CUSTOMER CLUB OR NEWSLETTER, OR DISPLAY A SIGN AT THE CASHIER.

79% NEUTRAL CONSENT BANNER IN PLACE (COOKIE COMPLIANT).

15% PROMOTE SECOND HAND SHOPPING ONLINE.

FURNITURE AND HOME INTERIOR

In the Furniture and Home Interior category, we see that maintaining a seamless, consistent conversation with your customer is key; when they leave one channel, they can pick up where they left off in another. Whether you're in the app or the store, the experience should be the same. The staff is empowered to place orders on behalf of customers in 81% of cases, thanks to digital tools. Customer data and a single view are the fuel that connects your touchpoints with the customer. It allows them to track the progress of their order, know when to expect it to arrive and stay informed of any changes. This aspect, paired with a solid app as part of the customer journey, is something that IKEA excels in, and it's clearly reflected in this sweeping index performance.

Top performers

| 1 | **IKEA** 69% NORWAY | 2 | **IKEA** 67% FINLAND | 3 | **IKEA** 66% SWEDEN |

IKEA is dominates the leaderboards across the Furniture and Home Interior category. With a stellar performance across all phases of the customer journey and in all eight disciplines, they are clearly leading the way. Two factors that set them apart from other companies are their performance in the "App" and "Sustainability and Compliance" disciplines, where they score 83% and 50% respectively, compared to an index average of 11% and 19%.

4	IKEA	DENMARK	64%		8	IMERCO	DENMARK	51%
5	IKEA	THE NETHERLANDS	60%		9	KID INTERIØR	NORWAY	49%
6	IKEA	BELGIUM	59%		10	INDISKA	SWEDEN	47%
7	CERVERA	SWEDEN	53%					

FURNITURE AND HOME INTERIOR

Phase 01: Awareness

29% USE GOOGLE LOCAL INVENTORY SHOPPING ADS.

73% REACH +90 SEO SCORE AT LIGHTHOUSE.

Phase 02: Evaluation

15% USE IN-STORE QR CODES PROVIDING EXTRA INFO ON PRODUCTS OR CATEGORIES.

69% SHOW ON PDP IF AN ITEM IS AVAILABLE IN LOCAL STORE.

50% SHOW CUSTOMER REVIEWS ON PRODUCT LEVEL.

2% REACH A GOOGLE PAGE SPEED OF 60/100 ON FP, PLP AND PDP FROM MOBILE.

13% USE BEHAVIOUR-BASED SEARCH FUNCTION ON WEBSITE (PERSONALISED/OPTIMISED).

21% REACH A GOOGLE ACCESSIBILITY SCORE OF 90/100 ON FP, PLP AND PDP FROM MOBILE.

50% CHAT WITH STORE STAFF TO GET PRODUCT ADVICE.

2% SELL REPAIRED OR REFURBISHED PRODUCTS.

0% SHOW ENVIRONMENTAL FOOTPRINT OF PRODUCTS ON PDP.

71% SHOW AT LEAST TWO PERSONALISED UP- AND CROSS-SELLING OPPORTUNITIES ON PDP.

Phase 03: Purchase

54% USE ONLINE UP- AND CROSS SELLING IN MINI-BASKET OR BASKET.

48% STORE THE CUSTOMER'S BASKET ACROSS DEVICES FOR SEAMLESS SHOPPING WITH OMNIBASKET.

2% PAY FOR AN ITEM ON SHOP FLOOR WITH A SHOP ASSISTANT (MOBILE POS).

81% MAKE STAFF DO AN ONLINE ORDER AND SHIP TO HOME ADDRESS/TO STORE.

67% OFFER "BUY NOW, PAY LATER" ONLINE.

Phase 04: Service

15% OFFER CLICK & COLLECT OR CLICK & RESERVE WITHIN 4 HOURS ON PDP.

38% ANSWER EMAIL INQUIRIES WITHIN 4 HOURS.

67% GET ORDER HISTORY ON MY PROFILE BY ASKING A SHOP ASSISTANT IN-STORE.

10% OFFER SHIPPING CHOICES BASED ON CLIMATE-FRIENDLY "BEST CHOICE" OPTIONS.

15% PROVIDE EXTENDED WARRANTY.

Phase 05: Loyalty

17% OFFER CUSTOMER APP ON APP STORE OR GOOGLE PLAY.

67% OFFER REGISTRATION NEWSLETTER OR LOYALTY CLUB DURING CHECKOUT.

19% SEND AUTOMATED EMAILS BASED ON WEBSITE BEHAVIOUR WITHIN 48 HOURS (E.G., ABANDONED BASKET OR ABANDONED BROWSE).

50% RECRUIT CUSTOMERS VERBALLY FOR THE CUSTOMER CLUB OR NEWSLETTER, OR DISPLAY A SIGN AT THE CASHIER.

58% NEUTRAL CONSENT BANNER IN PLACE (COOKIE COMPLIANT).

HOUSE AND GARDEN

In the House and Garden category, the advisory aspect holds extreme importance, making in-store assistance crucial. As expected, we therefore observe a generally deep commitment to providing excellent customer service and in-store support. Moreover, keeping stock data up to date both online and offline represents a real challenge that House and Garden retailers seem to master better than the rest of the categories in this index. In 84% of cases, customers can easily find and check if an item is available in any alternative local store.

Additionally, this category excels in fulfillment flexibility, offering customers choices on how they want to collect, return, and order, ensuring true channel-agnostic convenience.

Top performers

1 **KAR WEI**
67% THE NETHERLANDS

2 **gamma**
64% THE NETHERLANDS

3 **JULA**
57% SWEDEN

With its exceptional digital maturity, Karwei sets a high standard in this category. Their technical prowess ensures a perfect score of 100% in both app performance and marketing. Their inspiring ads are strategically placed throughout the customer journey.

Karwei also excels in providing accurate product availability information and offers fast customer service response times, efficient site performance and flexible delivery and pickup options.

GAMMA boasts impressive technical performance, accompanied by excellent customer service and in-store support. Moreover, similarly to their sister company Karwei, they offer very flexible delivery and pickup options.

Jula implements a comprehensive single view of customer, integrating digital assets to bridge the gap between online and in-store experiences. Their online responsiveness, particularly evident in chat interactions, ensures seamless customer support.

4	HORNBACH	SWEDEN	56%
5	JOHANNES FOG	DENMARK	54%
6	OBS BYGG	NORWAY	53%
7	CLAS OHLSON	SWEDEN	50%

7	JULA	NORWAY	50%
8	BLOKKER	THE NETHERLANDS	49%
9	FARGERIKE	NORWAY	47%
10	PLANTAGEN	SWEDEN	46%

HOUSE AND GARDEN

Phase 01: Awareness

75% INCREASE ORGANIC TRAFFIC AT LEAST 10% IN THE LAST 12 MONTHS.

16% USE GOOGLE LOCAL INVENTORY SHOPPING ADS.

57% REACH +90 SEO SCORE AT LIGHTHOUSE.

49% USE IN-STORE PROMOTION OF ONLINE INITIATIVES.

Phase 02: Evaluation

20% USE IN-STORE QR CODES PROVIDING EXTRA INFO ON PRODUCTS OR CATEGORIES.

84% SHOW ON PDP IF AN ITEM IS AVAILABLE IN LOCAL STORE.

41% SHOW CUSTOMER REVIEWS ON PRODUCT LEVEL.

8% REACH A GOOGLE PAGE SPEED OF 60/100 ON FP, PLP AND PDP FROM MOBILE.

10% USE BEHAVIOUR-BASED SEARCH FUNCTION ON WEBSITE (PERSONALISED/OPTIMISED).

24% REACH A GOOGLE ACCESSIBILITY SCORE OF 90/100 ON FP, PLP AND PDP FROM MOBILE.

4% SHOW ENVIRONMENTAL FOOTPRINT OF PRODUCTS ON PDP.

67% SHOW AT LEAST TWO PERSONALISED UP- AND CROSS-SELLING OPPORTUNITIES ON PDP.

Phase 03: Purchase

57% STORE THE CUSTOMER'S BASKET ACROSS DEVICES FOR SEAMLESS SHOPPING WITH OMNIBASKET.

0% PAY FOR AN ITEM ON SHOP FLOOR WITH A SHOP ASSISTANT (MOBILE POS).

75% MAKE STAFF DO AN ONLINE ORDER AND SHIP TO HOME ADDRESS/TO STORE.

Phase 04: Service

80% OFFER CLICK & COLLECT OR DELIVERY TO STORE IN CHECKOUT.

12% OFFER CLICK & COLLECT OR CLICK & RESERVE WITHIN 4 HOURS ON PDP.

57% ANSWER EMAIL INQUIRIES WITHIN 4 HOURS.

12% OFFER SAME-DAY DELIVERY IN HIGH POPULATION CITIES.

53% GET ORDER HISTORY ON MY PROFILE BY ASKING A SHOP ASSISTANT IN-STORE.

Phase 05: Loyalty

43% OFFER CUSTOMER APP ON APP STORE OR GOOGLE PLAY.

61% OFFER REGISTRATION NEWSLETTER OR LOYALTY CLUB DURING CHECKOUT.

16% SEND AUTOMATED EMAILS BASED ON WEBSITE BEHAVIOUR WITHIN 48 HOURS (E.G., ABANDONED BASKET OR ABANDONED BROWSE).

39% OFFER EXCLUSIVE BENEFITS FOR LOYALTY CLUB MEMBERS.

63% RECRUIT CUSTOMERS VERBALLY FOR THE CUSTOMER CLUB OR NEWSLETTER, OR DISPLAY A SIGN AT THE CASHIER.

67% NEUTRAL CONSENT BANNER IN PLACE (COOKIE COMPLIANT).

JEWELLERY AND WATCHES

Jewellery and Watches brands and multibrand retailers only truly excel in a few areas. One of these areas is the use of social media across various platforms (scoring 91%). Moreover, similar to the Fashion category, their online mobile payment integrations (100% of the players) are also a clear sign of how seamlessly and conveniently they manage to support and round up the customer journey with the purchase phase. In most other areas, they fall well below the index average, which also means that this category offers ample opportunities for improvement.

Top performers

1	vibholm	2	PLAZA	2	PANDORA
	44% DENMARK		**41% DENMARK**		**41% DENMARK**

Vibholm excels in stock data and fulfillment, scoring 73% up against the category average of 32%. Their Best Practice UX score is a stunning 67% better than the category index, clearly showcasing their commitment to providing exceptional user experiences. While these numbers are impressive, they also indicate that even Vibholm, as the category leader, has significant potential for further growth and development.

Plaza's strong performance in stock data and fulfillment secures them the shared second-place position. They scored 73%, significantly higher than the category average of 32%. They also perform well in the service phase, among others, when it comes to ensuring speedy response times.

The other second-place finisher, Pandora, demonstrates strength in customer data management—especially when it comes to recruiting for loyalty clubs and offering benefits. While their focus is largely international, it's remarkable that they can still make the top 3 in both the Nordics and the Benelux.

3	UR & PENN	SWEDEN	40%	7	CARAT	DENMARK	30%
4	PANDORA	SWEDEN	37%	7	STJÄRNURMAKARNA	SWEDEN	30%
5	PILGRIM	DENMARK	36%	8	TIFFANY & CO	BELGIUM	27%
6	OLE LYNGGAARD	DENMARK	31%	9	CARRÉ - DK	DENMARK	24%

JEWELLERY AND WATCHES

Phase 01: Awareness

73% WORK WITH DISPLAY ADS.

27% USE UPPERFUNNEL BRAND ADS AND STORE-FOCUSED ADS ACROSS META, YOUTUBE, PINTEREST AND TIKTOK.

0% USE GOOGLE LOCAL INVENTORY SHOPPING ADS.

36% REACH +90 SEO SCORE AT LIGHTHOUSE.

Phase 02: Evaluation

64% SHOW ON PDP IF AN ITEM IS AVAILABLE IN LOCAL STORE.

9% SHOW VISUAL USER-GENERATED CONTENT ON PDP.

0% REACH A GOOGLE PAGE SPEED OF 60/100 ON FP, PLP AND PDP FROM MOBILE.

45% SHOW PERSONALISED PRODUCT RECOMMENDATION ON HOMEPAGE.

0% REACH A GOOGLE ACCESSIBILITY SCORE OF 90/100 ON FP, PLP AND PDP FROM MOBILE.

18% CHAT WITH STORE STAFF TO GET PRODUCT ADVICE.

0% SHOW ENVIRONMENTAL FOOT-PRINT OF PRODUCTS ON PDP.

73% SHOW AT LEAST TWO PERSON-ALISED UP- AND CROSS-SELLING OPPORTUNITIES ON PDP.

Phase 03: Purchase

45% STORE THE CUSTOMER'S BASKET ACROSS DEVICES FOR SEAMLESS SHOPPING WITH OMNIBASKET.

9% PAY FOR AN ITEM ON SHOP FLOOR WITH A SHOP ASSISTANT (MOBILE POS).

36% MAKE STAFF DO AN ONLINE ORDER AND SHIP TO HOME ADDRESS/TO STORE.

Phase 04: Service

36% OFFER CLICK & COLLECT OR DELIV-ERY TO STORE IN CHECKOUT.

18% OFFER CLICK & COLLECT OR CLICK & RESERVE WITHIN 4 HOURS ON PDP.

45% ANSWER EMAIL INQUIRIES WITHIN 4 HOURS.

45% GET ORDER HISTORY ON MY PROFILE BY ASKING A SHOP ASSISTANT IN-STORE.

9% SHIP FROM STORE.

Phase 05: Loyalty

0% OFFER CUSTOMER APP ON APP STORE OR GOOGLE PLAY.

91% OFFER REGISTRATION NEWSLET-TER OR LOYALTY CLUB DURING CHECKOUT.

9% SEND AUTOMATED EMAILS BASED ON WEBSITE BEHAVIOUR WITHIN 48 HOURS (E.G., ABANDONED BAS-KET OR ABANDONED BROWSE).

73% RECRUIT CUSTOMERS VERBALLY FOR THE CUSTOMER CLUB OR NEWSLETTER, OR DISPLAY A SIGN AT THE CASHIER.

73% NEUTRAL CONSENT BANNER IN PLACE (COOKIE COMPLIANT).

KIDS

When assessing omnichannel maturity, the Kids category is still in its toddler years. However, some notable contenders are making strides, particularly in areas related to customer engagement and service delivery.

One of the few areas where multi-brand retailers and brands stand out is the in-store return experience of online purchase, where they achieve an impressing 100% score.

Top performers

1	**BabySam**	1	*Luksus* & TWEENS **BABY**	2	P O.P
	47% DENMARK		**47% DENMARK**		**46% SWEDEN**

BabySam emerges as the leader in the Kids category. While they may not benchmark as strongly against other categories, they excel in stock data and fulfillment, offering flexible pick-up and delivery options and ensuring in-store availability. They also prioritise customer loyalty and excel in the purchase phase, making it easy to convert.

Luksusbaby demonstrates strength in digital marketing, leveraging their digital platform effectively to showcase relative maturity in the category. They excel in creating engaging social media content and inspiring advertisements throughout the customer journey.

Polarn O. Pyret shines in the loyalty phase, offering excellent loyalty benefits to their customers. They prioritise customer service and in-store support, working towards establishing a single view of customer and implementing in-store tools to enhance customer service.

3	BR	DENMARK	40%		7	BARNAS HUS	NORWAY	27%
4	LEGEKÆDEN	DENMARK	36%		7	EXTRA LEKER	NORWAY	27%
5	ØNSKEBØRN	DENMARK	30%		8	LEKIA	SWEDEN	24%
6	KÆRE BØRN	DENMARK	29%					

KIDS

Phase 01: Awareness

80% WORK WITH DISPLAY ADS.

20% USE GOOGLE LOCAL INVENTORY SHOPPING ADS.

20% REACH +90 SEO SCORE AT LIGHTHOUSE.

Phase 02: Evaluation

70% SHOW ON PDP IF AN ITEM IS AVAILABLE IN LOCAL STORE.

20% SHOW CUSTOMER REVIEWS ON PRODUCT LEVEL.

0% REACH A GOOGLE PAGE SPEED OF 60/100 ON FP, PLP AND PDP FROM MOBILE.

30% USE BEHAVIOUR-BASED SEARCH FUNCTION ON WEBSITE (PERSONALISED/OPTIMISED).

20% SHOW PERSONALISED PRODUCT RECOMMENDATION ON HOMEPAGE.

0% REACH A GOOGLE ACCESSIBILITY SCORE OF 90/100 ON FP, PLP AND PDP FROM MOBILE.

0% INCORPORATE SPECIAL APP FEATURES FOR EASIER SHOPPING EVALUATION AND DECISION-MAKING (VISUAL SEARCH, OBJECT RECOGNITION, AND AUGMENTED REALITY).

0% SHOW ENVIRONMENTAL FOOTPRINT OF PRODUCTS ON PDP.

80% SHOW AT LEAST TWO PERSONALISED UP- AND CROSS-SELLING OPPORTUNITIES ON PDP.

Phase 03: Purchase

40% STORE THE CUSTOMER'S BASKET ACROSS DEVICES FOR SEAMLESS SHOPPING WITH OMNIBASKET.

0% PAY FOR AN ITEM ON SHOP FLOOR WITH A SHOP ASSISTANT (MOBILE POS).

50% MAKE STAFF DO AN ONLINE ORDER AND SHIP TO HOME ADDRESS/TO STORE.

Phase 04: Service

80% OFFER CLICK & COLLECT OR DELIVERY TO STORE IN CHECKOUT.

70% ANSWER EMAIL INQUIRIES WITHIN 4 HOURS.

10% OFFER SAME-DAY DELIVERY IN HIGH POPULATION CITIES.

20% GET ORDER HISTORY ON MY PROFILE BY ASKING A SHOP ASSISTANT IN-STORE.

20% SHIP FROM STORE.

Phase 05: Loyalty

0% OFFER CUSTOMER APP ON APP STORE OR GOOGLE PLAY.

90% OFFER REGISTRATION NEWSLETTER OR LOYALTY CLUB DURING CHECKOUT.

20% SEND AUTOMATED EMAILS BASED ON WEBSITE BEHAVIOUR WITHIN 48 HOURS (E.G., ABANDONED BASKET OR ABANDONED BROWSE).

30% RECRUIT CUSTOMERS VERBALLY FOR THE CUSTOMER CLUB OR NEWSLETTER, OR DISPLAY A SIGN AT THE CASHIER.

70% NEUTRAL CONSENT BANNER IN PLACE (COOKIE COMPLIANT).

10% PROMOTE SECOND HAND SHOPPING ONLINE.

PETS, GIFTS AND HOBBY

The Pets, Gifts & Hobby category has understood, like no other, the need to "fidelise" their clients and focus on newsletter content and/or loyalty club promotions during checkout (in nearly 90% of cases).

This way they can create repeated purchases and use their digital and communication assets online (website and/or app) and in-store for better up- and cross-selling (82% of the cases) than other categories.

Top performers

(1)	**ARKEN ZOO**	(2)	**Musti ja Mirri**	(2)	*norli* SIDEN 1890
	51% SWEDEN		**50% FINLAND**		**50% NORWAY**

Arken Zoo shines in the conversion phase. With a focus on best practice UX, Arken Zoo offers seamless navigation and excellent personalisation. Their commitment to providing a user-friendly interface, coupled with personalised and inspiring content, positions them as the frontrunner in their category, driving conversion and customer satisfaction.

Musti ja Mirri is acing digital marketing and stock management. Their captivating social media content and strategic ad placement engage customers throughout their journey. They also excel in stock data and fulfillment, offering flexible pickup and delivery options.

Norli, like Musti ja Mirri, impresses with their digital marketing and stock management capabilities. They also excel in organic search, boasting a +90 Google Lighthouse SEO score. Norli also demonstrates proficiency in stock data and fulfillment, ensuring efficient operations and customer satisfaction. By adding strong digital marketing strategies and dedicating themselves to optimising stock management, Norli secures a fine third-place finish in the category.

3	ZOO.SE	SWEDEN	47%
4	LEGO	DENMARK	44%
5	PANDURO	SWEDEN	43%
6	PANDURO	NORWAY	41%
6	SØSTRENE GRENE	NORWAY	41%
7	SØSTRENE GRENE	DENMARK	40%

7	SUOMALAINEN KIRJAKAUPPA OY	FINLAND	40%
8	BOG & IDÉ	DENMARK	39%
8	KIDS COOLSHOP/ COOLSHOP.DK	DENMARK	39%
9	AKADEMIBOKHANDELN	SWEDEN	37%
9	SØSTRENE GRENE	SWEDEN	37%
10	ARK BOKHANDEL	NORWAY	34%

PETS, GIFTS AND HOBBY

Phase 01: Awareness

61% INCREASE ORGANIC TRAFFIC AT LEAST 10% IN THE LAST 12 MONTHS.

0% USE GOOGLE LOCAL INVENTORY SHOPPING ADS.

50% REACH +90 SEO SCORE AT LIGHTHOUSE.

36% USE IN-STORE PROMOTION OF ONLINE INITIATIVES.

Phase 02: Evaluation

7% USE IN-STORE QR CODES PROVIDING EXTRA INFO ON PRODUCTS OR CATEGORIES.

61% SHOW ON PDP IF AN ITEM IS AVAILABLE IN LOCAL STORE.

39% SHOW CUSTOMER REVIEWS ON PRODUCT LEVEL.

0% REACH A GOOGLE PAGE SPEED OF 60/100 ON FP, PLP AND PDP FROM MOBILE.

14% USE BEHAVIOUR-BASED SEARCH FUNCTION ON WEBSITE (PERSONALISED/OPTIMISED).

11% REACH A GOOGLE ACCESSIBILITY SCORE OF 90/100 ON FP, PLP AND PDP FROM MOBILE.

0% SHOW ENVIRONMENTAL FOOTPRINT OF PRODUCTS ON PDP.

68% SHOW AT LEAST TWO PERSONALISED UP- AND CROSS-SELLING OPPORTUNITIES ON PDP.

Phase 03: Purchase

61% STORE THE CUSTOMER'S BASKET ACROSS DEVICES FOR SEAMLESS SHOPPING WITH OMNIBASKET.

4% PAY FOR AN ITEM ON SHOP FLOOR WITH A SHOP ASSISTANT (MOBILE POS).

39% MAKE STAFF DO AN ONLINE ORDER AND SHIP TO HOME ADDRESS/TO STORE.

Phase 04: Service

46% OFFER CLICK & COLLECT OR DELIVERY TO STORE IN CHECKOUT.

7% OFFER CLICK & COLLECT OR CLICK & RESERVE WITHIN 4 HOURS ON PDP.

61% ANSWER EMAIL INQUIRIES WITHIN 4 HOURS.

11% OFFER SAME-DAY DELIVERY IN HIGH POPULATION CITIES.

39% GET ORDER HISTORY ON MY PROFILE BY ASKING A SHOP ASSISTANT IN-STORE.

Phase 05: Loyalty

21% OFFER CUSTOMER APP ON APP STORE OR GOOGLE PLAY.

89% OFFER REGISTRATION NEWSLETTER OR LOYALTY CLUB DURING CHECKOUT.

11% SEND AUTOMATED EMAILS BASED ON WEBSITE BEHAVIOUR WITHIN 48 HOURS (E.G., ABANDONED BASKET OR ABANDONED BROWSE).

50% OFFER EXCLUSIVE BENEFITS FOR LOYALTY CLUB MEMBERS.

50% RECRUIT CUSTOMERS VERBALLY FOR THE CUSTOMER CLUB OR NEWSLETTER, OR DISPLAY A SIGN AT THE CASHIER.

64% NEUTRAL CONSENT BANNER IN PLACE (COOKIE COMPLIANT).

PHARMA AND BEAUTY

While technology offers opportunities for enhanced customer experiences and wider reach, seamless blending of online and offline channels remains a hurdle for Pharma and Beauty retailers. Success demands adeptness in balancing consumer convenience with regulatory compliance and brand reputation. Generally, the Pharma & Beauty category places significant emphasis on loyalty initiatives and excels in this aspect. All players (100%) offer monetary and/or exclusive benefits for loyalty club members.

There's a greater presence on digital channels across platforms (at 100%), and, consequently, brand searches for this category have grown substantially in the last 12 months. In general, this category offers a much higher index score compared to the rest of the categories.

Top performers

(1)	matas	(2)	SEPHORA	(3)	ICI PARIS XL
	66% DENMARK		60% DENMARK		54% THE NETHERLANDS

Matas maintains its position as a market leader in digital marketing and customer data use. They excel in providing smooth and seamless purchasing experiences, while also fostering a sense of community through their customer club. Matas is at the forefront of integrating first-party customer data from stores for a true omnichannel approach in their digital strategy.

Sephora has relaunched its e-commerce site and app in Denmark since the last survey in 2022, with a heightened focus on click-and-collect and availability, which has made a significant difference. They excel in loyalty programmes and are indexed as the best in this aspect. Sephora performs exceptionally well in app usage, CRM and customer data management, showing significant improvement compared to previous evaluations.

ICI PARIS XL stands out in CRM and customer data management, boasting better Best Practice UX than both the first and second-ranked competitors. They excel in providing inspiring content and guiding customers through their journey. ICI leverages customer reviews (including user images) to enhance their credibility and engagement.

4	LYKO	SWEDEN	53%		7	APOTEKET	SWEDEN	46%
4	DOUGLAS	THE NETHERLANDS	53%		7	KICKS	SWEDEN	46%
5	KRONANSAPOTEK	SWEDEN	50%		7	APOTEK1	NORWAY	46%
5	RITUALS	SWEDEN	50%		8	RITUALS	THE NETHERLANDS	43%
6	RITUALS	DENMARK	49%		9	ETOS	THE NETHERLANDS	37%
6	APOTEK HJÄRTAT	SWEDEN	49%		10	KRUIDVAT	THE NETHERLANDS	34%
6	KICKS	NORWAY	49%					

PHARMA AND BEAUTY

Phase 01: Awareness

35% INCREASE ORGANIC TRAFFIC AT LEAST 10% IN THE LAST 12 MONTHS.

25% USE GOOGLE LOCAL INVENTORY SHOPPING ADS.

73% REACH +90 SEO SCORE AT LIGHTHOUSE.

33% USE IN-STORE PROMOTION OF ONLINE INITIATIVES.

Phase 02: Evaluation

25% USE IN-STORE QR CODES PROVIDING EXTRA INFO ON PRODUCTS OR CATEGORIES.

67% SHOW ON PDP IF AN ITEM IS AVAILABLE IN LOCAL STORE.

56% SHOW CUSTOMER REVIEWS ON PRODUCT LEVEL.

6% REACH A GOOGLE PAGE SPEED OF 60/100 ON FP, PLP AND PDP FROM MOBILE.

13% USE BEHAVIOUR-BASED SEARCH FUNCTION ON WEBSITE (PERSONALISED/OPTIMISED).

21% REACH A GOOGLE ACCESSIBILITY SCORE OF 90/100 ON FP, PLP AND PDP FROM MOBILE.

0% SHOW ENVIRONMENTAL FOOTPRINT OF PRODUCTS ON PDP.

71% SHOW AT LEAST TWO PERSONALISED UP- AND CROSS-SELLING OPPORTUNITIES ON PDP.

Phase 03: Purchase

58% STORE THE CUSTOMER'S BASKET ACROSS DEVICES FOR SEAMLESS SHOPPING WITH OMNIBASKET.

17% PAY FOR AN ITEM ON SHOP FLOOR WITH A SHOP ASSISTANT (MOBILE POS).

67% MAKE STAFF DO AN ONLINE ORDER AND SHIP TO HOME ADDRESS/TO STORE.

Phase 04: Service

73% OFFER CLICK & COLLECT OR DELIVERY TO STORE IN CHECKOUT.

15% OFFER CLICK & COLLECT OR CLICK & RESERVE WITHIN 4 HOURS ON PDP.

15% ANSWER EMAIL INQUIRIES WITHIN 4 HOURS.

6% OFFER SAME-DAY DELIVERY IN HIGH POPULATION CITIES.

58% GET ORDER HISTORY ON MY PROFILE BY ASKING A SHOP ASSISTANT IN-STORE.

15% OFFER CLICK & COLLECT OR CLICK & RESERVE WITHIN 4 HOURS ON PDP.

15% ANSWER EMAIL INQUIRIES WITHIN 4 HOURS.

6% OFFER SAME-DAY DELIVERY IN HIGH POPULATION CITIES.

58% GET ORDER HISTORY ON MY PROFILE BY ASKING A SHOP ASSISTANT IN-STORE.

Phase 05: Loyalty

54% OFFER CUSTOMER APP ON APP STORE OR GOOGLE PLAY.

92% OFFER REGISTRATION NEWSLETTER OR LOYALTY CLUB DURING CHECKOUT.

15% SEND AUTOMATED EMAILS BASED ON WEBSITE BEHAVIOUR WITHIN 48 HOURS (E.G., ABANDONED BASKET OR ABANDONED BROWSE).

56% OFFER EXCLUSIVE BENEFITS FOR LOYALTY CLUB MEMBERS.

65% RECRUIT CUSTOMERS VERBALLY FOR THE CUSTOMER CLUB OR NEWSLETTER, OR DISPLAY A SIGN AT THE CASHIER.

71% NEUTRAL CONSENT BANNER IN PLACE (COOKIE COMPLIANT).

FOOTWEAR

The Footwear category generally falls short compared to the rest of the index. This circumstance may lead some companies within this category to consider benchmarking themselves against players in the Fashion category instead. One of the few things that stands out compared to the rest of the index is the ability for store staff, in 93% of cases, to access stock data in other stores. It is, however, important to note that this is also considered a hygiene factor in the category. Similarly, the ability to return an online purchase in-store achieves a high score.

For the rest, it's safe to say there's plenty of room for improvement, and hopefully, some inspiration can be found in the efforts of the top three companies.

Top performers

1 **SCORETT** QUALITY MATTERS
49% SWEDEN

2 **NELSON**
47% THE NETHERLANDS

3 **Foot Locker**
44% THE NETHERLANDS

Scorett leads in loyalty benefits and actively engage with customer data, ensuring personalised experiences. Their social media presence is notable, delivering relevant content to their audience. Additionally, Scorett prioritises CRM strategies to enhance customer relationships and drive conversions.

Nelson Schoenen focuses on CRM and customer data, leveraging these insights to improve customer experiences. They stand out in the purchase phase, streamlining the conversion process for customers. Nelson Schoenen enhances the overall shopping journey by ensuring seamless transitions when customers are ready to make a purchase.

Foot Locker leads the pack in stock data and fulfillment. Their commitment to showing product availability in-store enhances the customer experience. Moreover, they are making strides in implementing a single view of stock, further optimising their operations and ensuring efficient fulfillment processes.

4	EUROSKO	NORWAY	40%
5	SKETCHERS	DENMARK	39%
5	SKORINGEN	NORWAY	39%
5	ZIENGS	THE NETHERLANDS	39%
6	ECCO	DENMARK	37%
6	DINSKO	SWEDEN	37%

7	DEICHMANN	SWEDEN	34%
7	SKOPUNKTEN	SWEDEN	34%
8	SKORINGEN (SHOE-D-VISION)	DENMARK	33%
9	RIZZO	SWEDEN	31%
10	NEW BALANCE	THE NETHERLANDS	29%

FOOTWEAR

Phase 01: Awareness

80% WORK WITH DISPLAY ADS.

7% USE GOOGLE LOCAL INVENTORY SHOPPING ADS.

60% REACH +90 SEO SCORE AT LIGHTHOUSE.

Phase 02: Evaluation

87% SHOW ON PDP IF AN ITEM IS AVAILABLE IN LOCAL STORE.

33% SHOW CUSTOMER REVIEWS ON PRODUCT LEVEL.

0% REACH A GOOGLE PAGE SPEED OF 60/100 ON FP, PLP AND PDP FROM MOBILE.

7% USE BEHAVIOUR-BASED SEARCH FUNCTION ON WEBSITE (PERSONALISED/OPTIMISED).

20% SHOW PERSONALISED PRODUCT RECOMMENDATION ON HOMEPAGE.

20% REACH A GOOGLE ACCESSIBILITY SCORE OF 90/100 ON FP, PLP AND PDP FROM MOBILE.

0% INCORPORATE SPECIAL APP FEATURES FOR EASIER SHOPPING EVALUATION AND DECISION-MAKING (VISUAL SEARCH, OBJECT RECOGNITION, AND AUGMENTED REALITY).

0% SHOW ENVIRONMENTAL FOOTPRINT OF PRODUCTS ON PDP.

80% SHOW AT LEAST TWO PERSONALISED UP- AND CROSS-SELLING OPPORTUNITIES ON PDP.

Phase 03: Purchase

47% STORE THE CUSTOMER'S BASKET ACROSS DEVICES FOR SEAMLESS SHOPPING WITH OMNIBASKET.

7% PAY FOR AN ITEM ON SHOP FLOOR WITH A SHOP ASSISTANT (MOBILE POS).

80% MAKE STAFF DO AN ONLINE ORDER AND SHIP TO HOME ADDRESS/TO STORE.

Phase 04: Service

47% OFFER CLICK & COLLECT OR DELIVERY TO STORE IN CHECKOUT.

53% ANSWER EMAIL INQUIRIES WITHIN 4 HOURS.

0% OFFER SAME-DAY DELIVERY IN HIGH POPULATION CITIES.

53% GET ORDER HISTORY ON PROFILE BY ASKING A SHOP ASSISTANT IN-STORE.

20% SHIP FROM STORE.

Phase 05: Loyalty

13% OFFER CUSTOMER APP ON APP STORE OR GOOGLE PLAY.

67% OFFER REGISTRATION NEWSLETTER OR LOYALTY CLUB DURING CHECKOUT.

20% SEND AUTOMATED EMAILS BASED ON WEBSITE BEHAVIOUR WITHIN 48 HOURS (E.G., ABANDONED BASKET OR ABANDONED BROWSE).

80% RECRUIT CUSTOMERS VERBALLY FOR THE CUSTOMER CLUB OR NEWSLETTER, OR DISPLAY A SIGN AT THE CASHIER.

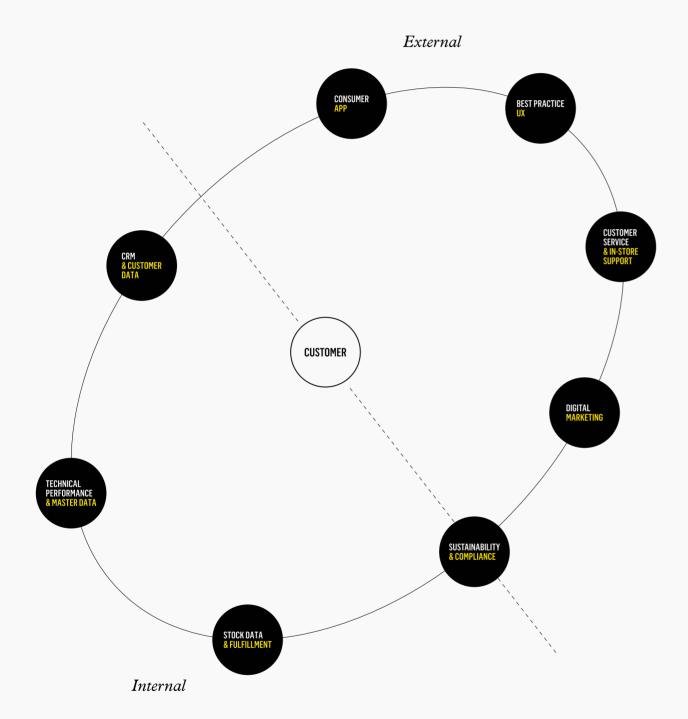**40%** NEUTRAL CONSENT BANNER IN PLACE (COOKIE COMPLIANT).

12% PROMOTE SECOND HAND SHOPPING ONLINE.

SPORT AND LEISURE

In Sport and Leisure, we observe a clear use of digital channels across all platforms from Google to Meta to TikTok. Particularly, the link with product ads across all platforms is used by nearly 100% of Sport and Leisure players.

Moreover, in 90% of cases, they show if an item is available in a (nearby) local store, enabling them to share their physical store's inventory online in real-time. Providing real-time information to customers means that they can

research online and plan ahead for a trip to the store. Decathlon is leading the way by a large margin in this category and has excelled in the omnichannel experience for several years now.

Top performers

① **DECATHLON**
63% BELGIUM

② **Peak Performance**
51% SWEDEN

② **XXL** All sports united
51% SWEDEN

Decathlon excels in Best Practice UX, ensuring a seamless and enjoyable online shopping experience. They also perform well in the purchase phase, effectively converting customers. Decathlon offers loyalty benefits and is actively working on establishing a single view of the customer to enhance their understanding of customer needs and preferences.

XXL and Peak Performance share second place. XXL focuses on customer service and in-store support, aiming to create a single view of the customer. They excel in quick response times, personalised customer service and customer recruitment efforts.

Peak Performance is likewise dedicated to creating a single view of customers. They effectively use customer data, prioritise quick response times and personalised service to enhance the overall customer experience.

3	A.S.ADVENTURE	BELGIUM	50%		6	PEAK PERFORMANCE	DENMARK	44%
4	SPORT 24	DENMARK	49%		7	SPEJDERSPORT	DENMARK	41%
4	BILTEMA	SWEDEN	49%		7	STADIUM	SWEDEN	41%
4	INTERSPORT	SWEDEN	49%		8	EUROPRIS	NORWAY	40%
4	XXL SPORT	NORWAY	49%		8	INTERSPORT	FINLAND	40%
5	NATURKOMPANIET	SWEDEN	46%		9	PAS NORMAL	DENMARK	39%
5	BILTEMA	NORWAY	46%		9	BILXTRA	NORWAY	39%
5	NORRØNA	NORWAY	46%		9	SPORT OUTLET	NORWAY	39%
5	BEVER	THE NETHERLANDS	46%		9	STORMBERG	NORWAY	39%
6	BILTEMA	DENMARK	44%		10	T. HANSEN	DENMARK	37%

SPORT AND LEISURE

Phase 01: Awareness

89% WORK WITH DISPLAY ADS.

22% USE GOOGLE LOCAL INVENTORY SHOPPING ADS.

56% REACH +90 SEO SCORE AT LIGHTHOUSE.

Phase 02: Evaluation

89% SHOW ON PDP IF AN ITEM IS AVAILABLE IN LOCAL STORE.

47% SHOW CUSTOMER REVIEWS ON PRODUCT LEVEL.

0% REACH A GOOGLE PAGE SPEED OF 60/100 ON FP, PLP AND PDP FROM MOBILE.

6% USE BEHAVIOUR-BASED SEARCH FUNCTION ON WEBSITE (PERSON-ALISED/OPTIMISED).

17% SHOW PERSONALISED PRODUCT RECOMMENDATION ON HOMEPAGE.

8% REACH A GOOGLE ACCESSIBILITY SCORE OF 90/100 ON FP, PLP AND PDP FROM MOBILE.

11% INCORPORATE SPECIAL APP FEATURES FOR EASIER SHOPPING EVALUATION AND DECISION-MAK-ING (VISUAL SEARCH, OBJECT RECOGNITION, AND AUGMENTED REALITY).

0% SHOW ENVIRONMENTAL FOOT-PRINT OF PRODUCTS ON PDP.

67% SHOW AT LEAST TWO PERSON-ALISED UP- AND CROSS-SELLING OPPORTUNITIES ON PDP.

Phase 03: Purchase

53% STORE THE CUSTOMER'S BASKET ACROSS DEVICES FOR SEAMLESS SHOPPING WITH OMNIBASKET.

6% PAY FOR AN ITEM ON SHOP FLOOR WITH A SHOP ASSISTANT (MOBILE POS).

78% MAKE STAFF DO AN ONLINE ORDER AND SHIP TO HOME ADDRESS/TO STORE.

Phase 04: Service

78% OFFER CLICK & COLLECT OR DELIV-ERY TO STORE IN CHECKOUT.

81% ANSWER EMAIL INQUIRIES WITHIN 4 HOURS.

3% OFFER SAME-DAY DELIVERY IN HIGH POPULATION CITIES.

47% GET ORDER HISTORY ON MY PROFILE BY ASKING A SHOP ASSISTANT IN-STORE.

19% SHIP FROM STORE.

Phase 05: Loyalty

19% OFFER CUSTOMER APP ON APP STORE OR GOOGLE PLAY.

72% OFFER REGISTRATION NEWSLET-TER OR LOYALTY CLUB DURING CHECKOUT.

25% SEND AUTOMATED EMAILS BASED ON WEBSITE BEHAVIOUR WITHIN 48 HOURS (E.G., ABANDONED BAS-KET OR ABANDONED BROWSE).

50% RECRUIT CUSTOMERS VERBALLY FOR THE CUSTOMER CLUB OR NEWSLETTER, OR DISPLAY A SIGN AT THE CASHIER.

69% NEUTRAL CONSENT BANNER IN PLACE (COOKIE COMPLIANT).

GROCERIES

Grocery retailers play a vital role in meeting the everyday needs of consumers. The omnichannel customer journey for grocers is distinct due to its frequent repeat purchases and significant emphasis on loyalty, often coupled with price sensitivity. It's no surprise that grocery retailers and brands stand out with 100% coverage in terms of customer-facing apps, which help to 'fidelise' and increase customer lifetime value. Moreover, in 100% of cases, the loyalty app shows clear added value and offers monetary benefits/rewards to customers.

Top performers

| 1 | **Bilka** 54% DENMARK | 2 | KAUPAT 51% FINLAND | 3 | ICA 44% SWEDEN |

Bilka prioritises customer service and support, ensuring a quick response time, which is crucial in this sector. They actively promote digital initiatives in-store and emphasise the importance of their app, which serves to keep up a high repeat customer rate.

S-kaupat excels in CRM and customer data management, surpassing Bilka in this aspect. They focus on customer recruitment and offer member benefits to enhance customer loyalty. S-kaupat is committed to leveraging customer data to provide personalised experiences and improve overall satisfaction.

ICA prioritises their app's usability and features to enhance the customer experience, outperforming Bilka in terms of app functionality. Across all disciplines ICA remains a strong contender in the Groceries category.

4	DELHAIZE	BELGIUM	40%	6	ALBERT HEIJN	THE NETHERLANDS	36%
5	BIO-PLANET	BELGIUM	39%	7	JUMBO	THE NETHERLANDS	33%
5	COLRUYT	BELGIUM	39%	8	K-RAUTA	BELGIUM	26%
5	MENY	NORWAY	39%				

GROCERIES

Phase 01: Awareness

60% REACH +90 SEO SCORE AT LIGHTHOUSE.

30% PROMOTE OR ADVERTISE THE APP TO DRIVE USER INSTALLATIONS.

90% PUSH NOTIFICATIONS FOR USER ENGAGEMENT AND COMMUNICATION.

40% USE IN-STORE PROMOTION OF ONLINE INITIATIVES.

Phase 02: Evaluation

0% REACH A GOOGLE PAGE SPEED OF 60/100 ON FP, PLP AND PDP FROM MOBILE.

20% USE BEHAVIOUR-BASED SEARCH FUNCTION ON WEBSITE (PERSONALISED/OPTIMISED).

20% SHOW PERSONALISED PRODUCT RECOMMENDATION ON HOMEPAGE.

30% REACH A GOOGLE ACCESSIBILITY SCORE OF 90/100 ON FP, PLP AND PDP FROM MOBILE.

50% INCORPORATE SPECIAL APP FEATURES FOR EASIER SHOPPING EVALUATION AND DECISION-MAKING (VISUAL SEARCH, OBJECT RECOGNITION, AND AUGMENTED REALITY).

20% SHOW AT LEAST TWO PERSONALISED UP- AND CROSS-SELLING OPPORTUNITIES ON PDP.

Phase 03: Purchase

40% USE ONLINE UP- AND CROSS SELLING IN MINI-BASKET OR BASKET.

80% STORE THE CUSTOMER'S BASKET ACROSS DEVICES FOR SEAMLESS SHOPPING WITH OMNIBASKET.

0% USE BIOMETRIC ID TO ENABLE FASTEST/EASIEST PAYMENT IN APP.

Phase 04: Service

90% OFFER CLICK & COLLECT OR DELIVERY TO STORE IN CHECKOUT.

30% ANSWER EMAIL INQUIRIES WITHIN 4 HOURS.

20% OFFER SAME-DAY DELIVERY IN HIGH POPULATION CITIES.

50% PROVIDE DIGITAL SUPPORT OUTSIDE OPENING HOURS (7 DAYS A WEEK, INCLUDING EVENINGS).

10% OFFER SHIPPING CHOICES BASED ON CLIMATE-FRIENDLY "BEST CHOICE" OPTIONS.

Phase 05: Loyalty

100% OFFER CUSTOMER APP ON APP STORE OR GOOGLE PLAY.

100% OFFER REGISTRATION NEWSLETTER OR LOYALTY CLUB DURING CHECKOUT.

0% SEND AUTOMATED EMAILS BASED ON WEBSITE BEHAVIOUR WITHIN 48 HOURS (E.G., ABANDONED BASKET OR ABANDONED BROWSE).

100% OFFER MONETARY BENEFITS FOR LOYALTY CLUB MEMBERS.

50% RECRUIT CUSTOMERS VERBALLY FOR THE CUSTOMER CLUB OR NEWSLETTER, OR DISPLAY A SIGN AT THE CASHIER.

80% NEUTRAL CONSENT BANNER IN PLACE (COOKIE COMPLIANT).

DISCIPLINES

DISCIPLINES

This fourth version of the Omnichannel Index includes disciplines, which offers a ground-breaking approach to making data more actionable and matching it up against best practices in your organisation.

Nuancing data this way adds depth to your understanding of the data by
1) singling out the areas where you might be struggling, and
2) empowering leadership teams to facilitate change by pinpointing where, how and what action to take based on the insights.

External

CONSUMER
APP

BEST PRACTICE
UX

CRM
**& CUSTOMER
DATA**

CUSTOMER
SERVICE
**& IN-STORE
SUPPORT**

CUSTOMER

DIGITAL
MARKETING

TECHNICAL
PERFORMANCE
& MASTER DATA

SUSTAINABILITY
& COMPLIANCE

STOCK DATA
& FULFILLMENT

Internal

THE DISCIPLINES ARE DIVIDED INTO EIGHT MAIN CATEGORIES:

Digital Marketing
Stock Data and Fulfillment
Best Practice UX
Sustainability and Compliance
Customer Service and In-store Support
Technical Performance and Master Data
CRM and Customer Data
Consumer App

Below, we'll take deep dives into each discipline and complement them with a selection of thought leadership articles that illustrate exactly how each discipline applies to the real world of commerce.

DIGITAL MARKETING

Stay relevant or lose your competitive edge. Whether organic or paid, digital marketing comes down to whether you're increasing brand visibility and connecting with a wider audience across platforms to attract relevant traffic that converts.

CUSTOMER BENEFITS
IF YOU EXCEL IN THIS DISCIPLINE

For the customers, it's all about staying relevant, providing inspiration through apps, social media and newsletters as well as relevant campaigns. Being able to access the right products at the right time is key to customers, both for purchasing online or visiting a store at a later time.

BUSINESS BENEFITS
IF YOU EXCEL IN THIS DISCIPLINE

Maximise marketing ROI
Great initiatives in SEO, earned media and owned channels (such as personalised newsletters) can significantly improve your marketing efficiency, reducing overall spend.

Boost traffic and increase conversion
Optimise efforts to increase both website traffic and conversion rates is necessary and a great way to improve Customer Acquisition Cost (CAC).

Drive-to-store
Don't underestimate the spill-over effects from digital initiatives on driving in-store traffic and sales – 80% of in-store sales are influenced by a digital touchpoint.

WHAT ARE THE LEADERS GOOD AT?

01
Showing the right product at the right time – and coupling strong product inventory feeds with strong SEA/SEO performance.

02
Using customer data to craft relevant and personalised ads, including product listing ads or shopping ads with inventory, for optimised performance.

03
Unleashing the full potential of social media by posting frequently and staying relevant across channels.

04
Using consented tracking and deep performance insights to create optimal channel mix and bidding strategies.

05
Using product inventory ads to drive customers to the stores.

STOCK DATA AND FULFILLMENT

Always have an answer ready to meet customer needs. If your product is not available, you disappoint customers and miss out on sales. But to get to a single view of stock and shipping across all locations, you must master both processes around order handling and organising your stock. Once you can precisely display availability and offer customers accurate stock information across all channels, including click-and-collect and reserve-and-collect options, you can assure them that delivery is guaranteed, regardless of their location or the product's whereabouts.

CUSTOMER BENEFITS
IF YOU EXCEL IN THIS DISCIPLINE

Being able to assess products and stock availability is one of the most important and valuable data points for customers during the buying journey. The same holds true for flexible delivery options and friction-free returns that can ultimately make the difference between a sale or not.

BUSINESS BENEFITS
IF YOU EXCEL IN THIS DISCIPLINE

Drive-to-store & Conversion Rates
Store inventory is a valuable feature that drives foot traffic to retail stores. Moreover, displaying inventory at a (nearby) store will increase the conversion in-store.

Stock turnover and mark downs
Taking control of stock with data improves stock turnover and reduces mark downs.

Customer satisfaction
Improving stock accuracy and providing greater flexibility in terms of delivery and returns not only reduces errors but also increases overall customer satisfaction.

WHAT ARE THE LEADERS GOOD AT?

01
Stock accuracy – leaders understand how important it is to maintain instant, up-to-date stock across all platforms (web, app and stores).

02
Advanced order management capabilities and communication throughout the order flow – this includes omnichannel returns.

03
Creating a single view of inventory that covers both online and physical locations and tells them if products are back in order.

04
Flexibility, i.e., leaders offer a wide selection of delivery options that match the expectations for the local market need and are relevant to the ordered product.

05
Making returns and claims easy and friction-free for the customer – no matter if it's online or in a store.

BEST PRACTICE UX

User-focused, design-centric, clutter-free and consistent with brand and product, best practice UX aims to generate great, easy-to-use experiences and friction-free sales, ultimately encouraging customers to return.

Offering 'search filters,' 'favourites,' clear product availability and optimised payment methods across all digital assets (web and app) is a great start.

CUSTOMER BENEFITS
IF YOU EXCEL IN THIS DISCIPLINE

Customers want a streamlined shopping journey that is quick and effortless, includes inspirational elements and great written and visual communication. It's all about solving the customers' needs, for example, by providing guided shopping to help them find that perfect accessory to complement my product.

BUSINESS BENEFITS
IF YOU EXCEL IN THIS DISCIPLINE

Higher conversion
A truly great user experience supports conversion and drives revenue.

Increase customer satisfaction
Making a digital product easy to use also boosts overall customer satisfaction.

Increase average order value
Great UX-work and merchandising concepts lead to higher AOV.

WHAT ARE THE LEADERS GOOD AT?

01
Using first-party customer data to personalise the experience.

02
Ongoing conversion rate optimisation and A/B testing.

03
Thinking 'mobile first' – most customers browse via their phones, making a poor mobile experience a risky gamble.

04
Merchandising and on-site search – strategically placing commercial offers, accessories and product upsells as well as ensuring compelling and accurate on-site search experiences.

05
Being on brand – always prioritising quality in design and producing inspirational visual content.

SUSTAINABILITY AND COMPLIANCE

Sustainability is more important than ever, as it has profound impact on both the customer journey and companies' operating models. Customers seek transparency in their choices and expect companies to take responsibility. Consequently, companies are faced with a dual challenge: meeting heightened customer expectations while also ensuring compliance with new EU regulations.

For innovative and fast-moving companies, these challenges also present exciting new opportunities – such as exploring new revenue streams like re-commerce.

CUSTOMER BENEFITS
IF YOU EXCEL IN THIS DISCIPLINE

Being able to make a more sustainable choice is key – and this makes transparency more important than ever. Whether this concerns product traceability or the tracking of data used for marketing, it's important to get it right. Helping customers understand these complex topics by providing straightforward educational content can also empower them to make informed decisions.

BUSINESS BENEFITS
IF YOU EXCEL IN THIS DISCIPLINE

Strengthen brand
Increase loyalty and strengthen your brand by communicating transparently and honestly about your initiatives.

New opportunities
For the bold and innovative, sustainability offers plenty of new business models, data and revenue streams.

Customer data compliance
EU regulations are coming, and first movers fare better than those who procrastinate.

WHAT ARE THE LEADERS GOOD AT?

01
Product traceability – if transparency is already an established concept, it makes product traceability a breeze.

02
Circular thinking that promotes re-commerce initiatives or circular concepts (such as repairs).

03
Proactively anticipating and engaging with compliance related to EU regulations (accessibility, product passport and the handling of cookie/tracking protocols).

04
Optimising and testing new, eco-friendly fulfillment and packaging options.

05
True leaders refrain from greenwashing by walking before they talk, avoiding the pitfalls associated with greenwashing.

CUSTOMER SERVICE AND IN-STORE SUPPORT

Strong customer interactions are important, explaining why customer service is in-demand. Customer service is much more than just answering phones and taking basic questions; it's increasingly about offering customers product guidance, delivering a smooth customer experience and going the extra mile.

The best performing brands and multibrand retailers offer in-store access to technology and tools that make it easier for staff to serve the customers as they like to be served.

CUSTOMER BENEFITS
IF YOU EXCEL IN THIS DISCIPLINE

Customers expect great service across all channels, including quick response times and effective issue resolution. Having connected the digital experience to the in-store experience provides a much better overview of the product assortment and customer profile.

BUSINESS BENEFITS
IF YOU EXCEL IN THIS DISCIPLINE

Improved NPS
Great service equals increased customer satisfaction and loyalty.

Efficient and streamlined processes
Maintaining control over processes and channels reduces service costs.

Enhanced hit-rate and AOV
Better service also results in a better hit-rate (both in-store and online), ultimately impacting the average order value.

WHAT ARE THE LEADERS GOOD AT?

01
Using digital tools, like mPOS, to support in-store service.

02
Single view of customer ensures a seamless service experience across all channels, including stores.

03
Connecting stores to digital channels supports overview of extended product information and seamless order information.

04
Fast response times – this includes direct and personal messaging.

05
Fostering a customer-centric culture by going the extra mile to solve the customer's issues and answer their needs.

TECHNICAL PERFORMANCE AND MASTER DATA

Technical performance drives business performance. A modern, well-designed and flexible architecture empowers companies to deliver new value to customers with much faster time-to-market.

A strong technical foundation guarantees rapid load times and speed, supporting marketing initiatives such as SEO, UX optimisation as well as use of machine learning and conversion optimisation.

CUSTOMER BENEFITS
IF YOU EXCEL IN THIS DISCIPLINE

Whether you want a fast and high-performing digital experience, making it easy to find, pick and buy the right product or a personal experience, technical performance is key to meeting customer expectations.

BUSINESS BENEFITS
IF YOU EXCEL IN THIS DISCIPLINE

Improved performance on- and off-site
Fast performing digital assets that also support improved SEO and lower ad costs.

Sales and revenue uplift
A strong technical (commerce) foundation supports personalisation and sales-driven initiatives.

Tech-supported commercial opportunities
Simply put, tech-supported commercial opportunities lead to better sell-through rates and improved capabilities within product merchandising.

WHAT ARE THE LEADERS GOOD AT?

01
Building a strong and modern technical commerce setup that enables fast time-to-market.

02
Integrating platforms to maximise use of first-party data.

03
Securing best-in-class site speed.

04
Harnessing high quality master data for products and inventory.

05
Getting rid of silos – for strong alignment between IT and business to deliver on customer needs

CRM AND CUSTOMER DATA

The importance of properly collecting customer data and optimising the use of it can't be overstated. Why? Because it can tell you exactly what you need to know to be able to curate a successful user experience based entirely on segmented customer data and behaviour.

Once you get the ball rolling on this, it becomes easier to target new customers and use marketing spend more efficiently; meanwhile it makes it possible to create a true personalised experience in all phases of the customer journey – across all channels (website, app, customer service, email etc.)

CUSTOMER BENEFITS
IF YOU EXCEL IN THIS DISCIPLINE

With great customer data, companies can create a more personalised journey and provide much better service across channels, making the customer feel unique. By tapping into loyalty concepts, customers receive both monetary and experiential rewards, as well as tailored campaigns and personalised offers.

BUSINESS BENEFITS
IF YOU EXCEL IN THIS DISCIPLINE

Loyalty leads to more value
Strong loyalty concepts engage customers and help to increase customer lifetime value (CLV).

Valuable insights on shopping patterns
Analysing structured and clean customer data can yield valuable insights that can, ultimately, give you a competitive edge.

Better use of marketing spend
Having consented customer data and integrating first-party data into digital campaigns enable better use of marketing spend, paving the way to improved return on ad spend (ROAS).

WHAT ARE THE LEADERS GOOD AT?

01
Gathering customer data and permissions across both physical and digital channels.

02
Consolidating customer data from various channels and systems for smart use in marketing (e.g., optimised ads bidding).

03
A comprehensive single view of customers – that facilitates seamless service delivery and personalised experiences.

04
Loyalty concepts that effectively engage, reward and retain their audience.

05
Personalised experiences across physical and digital channels.

CONSUMER APP

With the steady rise in mobile usage, it's no wonder brands and multibrand retailers are now fully integrating apps into their digital-first strategy. Apps drive greater loyalty and revenue growth. According to eMarketer, app users generate 3.5 times more revenue per user, convert at twice the rate compared to mobile web users and exhibit a repeat rate three times higher. A focus on app is ultimately a focus on the customers, providing convenience and unique added value.

CUSTOMER BENEFITS
IF YOU EXCEL IN THIS DISCIPLINE

An app can give customers a truly convenient experience – if you're doing it right and ensuring that it's easy to use. It's an excellent channel for offering exclusive value-added services and for tailoring a personalised experience with relevant offers and unique loyalty rewards.

BUSINESS BENEFITS
IF YOU EXCEL IN THIS DISCIPLINE

Harness customer data and tracking
Leverage first-party data gathered within the app to gain deep insights into customer behaviour and preferences.

Foster loyalty
Nurture and strengthen customer loyalty to drive increased Customer Lifetime Value (CLV) through continual engagement efforts.

Higher conversion
Apps often convert way above benchmark observed in other channels (such as web shops) and drive more profitable sales.

WHAT ARE THE LEADERS GOOD AT?

01
Great apps generate loyalty and drive more valuable sales.

02
Delivering high-quality UI and inspiring product presentations and content (through app experiences).

03
Value-adding and unique services only for app customers.

04
Two-way customer communication (incl. chat and direct messaging).

05
On-boarding and integrated payment options.

INSIGHTS

INSIGHTS

For this fourth version of the Omnichannel Index 2024, we asked a number of our experts to provide deeper insights into the disciplines.

In this section you'll find perspectives and actionable advice on how to dive further into the mechanics of the Omnichannel disciplines.

AMPING UP THE APPS

This year, for the first time, we're addressing (shoppable) customer apps in the Omnichannel Index. Why? Because apps are gaining relevance and attention as robust figures have siphoned from leading brands.

By ***Lars Cimber***
Director, Apps Commerce, Sr. Innovation Consultant

IN BRIEF

Mobile apps are reshaping omnichannel commerce, particularly in Northern Europe, where retailers are witnessing increased usage and revenue. Apps lead to higher engagement, conversion rates and revenue compared to traditional web channels. The transformative potential of mobile apps in driving superior returns on investment in the retail sector cannot be ignored. However, if businesses are to capitalise on the app opportunity, they need to understand the necessity for continuous innovation and integration with physical and digital brand experiences.

When Scott Dunlap, Adidas' VP of Mobile, recently reported that *"when it comes to converting and engaging loyal users, apps win by a factor of three,"* it came as no surprise to those of us who dedicate every day to understanding how apps are transforming omnichannel commerce.

During a recent quarterly earnings call, Nike's CEO also praised apps as being their fastest growing channel with 500 million visitors in just a single quarter, stressing just how important it has become.

In Northern Europe we're seeing an uptick both in the use and revenue from retail apps (multibrands like Zalando, Boozt and Asos) and apps for single brands (e.g. H&M, IKEA, Zara etc.). To no one's surprise, Gen Z leads the way as almost 25% of that generation has downloaded a branded app. Along with millennials, they are also the most willing to accept push notifications. According to The Omnichannel Index 2024, currently 23% make use of push notifications for engagement and communication.

Everywhere brands and multibrand retailers are discovering just how important apps are to their business. So much so that Peter Hestbæk, Head of Digital Sales & Marketing at Matas, recently proclaimed that their strategy is to drive all their customers to our apps, simply because it's exceptional business.

Why the sudden focus on apps? Because getting apps right can provide significant omnichannel value., as new research conducted by IMPACT Commerce and Google reveals:

- 5-8 x more products browsed
- 3-7 x higher conversion rates
- Twice the average order value and revenue from app users
- 50% more in-store purchases from app users
- 4-8 x higher Return on Ad Spend (ROAS) on Click and Search with Web2App Connect

These numbers are telling: If you're not fully embracing apps, you're probably falling behind your competitors. The Omnichannel Index 2024 found that 31% of brands and multibrand retailers now offer a customer app available for download on the App Store or Google Play.

This image was created using AI.

GET STARTED
– A STEP-BY-STEP GUIDE

Creating apps is an ongoing process without a defined endpoint. Think of an app as something you need to nurture to ensure it stays strong. Once this type of app-first mindset is anchored among the relevant C-level stakeholders, your app adventure can begin.

UNLOCKING YOUR SUPERPOWER

A successful app adds strength to your brand. When in place, the customer app can amplify business through a range of app-specific capabilities and features. Some key facilitators for a successful app include loyalty/club engagement, strong online commerce share, multi-channel marketing capabilities, retail network, engaging campaigns and product launches as well as social media clout.

App convenience and user experience are among the amplifiers. The look and feel in an app are often significantly better than web. This owes to the fact that an app utilises the full potential of the mobile device, making the most of unique graphics and UI capabilities, location and biometrics for log-in and security. It also extends to latency in scrolling and navigation, the better video and sound playback as well as unique capabilities like object recognition, augmented reality, visual search and tap to pay.

WHEN PUSH COMES TO SHOVE

A key performance amplifier is how apps enable the use of push notifications for user engagement – adding a new channel to the marketing team. Together, great user experience, location and push notifications shape a basis for stunning app campaigns, apps supporting physical and digital brand events, contextual and location-specific loyalty offers, in-store support and experience enhancement, hyper-personalisation, seamless social media switching and interaction, as well as deep linking to app from Google product search, e-mails and other uses of URLs. The Omnichannel Index 2024 shows, that only 6% of brands and multibrand retailers use deep-linking to app today, whereas 16% enable better in-store experiences through the app.
Whereas the web is still dominant in ac-

quiring new customers, apps, due to the factors mentioned above, are becoming the tool for retaining customers and nurturing loyalty and brand building in a premium way. In an app the user is always "logged in" through the app ID. Consequently, for enriching user data and utilising CDP and personalisation data, apps will bring significant remedies and opportunities for revenue growth and handling customer data.

First, dedicate time to design and concepting to find a unique app proposition. Apps with successful business cases typically combine three elements:

1) engaging shopping experience,
2) personalised marketing dedicated to the app user
and 3) app loyalty benefits.

The customers are very clear on this: apps need to bring a clear benefit over the web shopping channel, meaning it should be more convenient and offer "something special".

Our advice is to carefully identify the traffic drivers, revenue drivers and hero concepts that make the app sticky with the audience. Too many apps are merely replicating the web shopping experience and taking shortcuts with web-to-app frameworks. If WordPress doesn't suffice for your web experience, web wrappers will not suffice for your app. While it's quite straightforward to initiate the shopping experience of the app, dedicating some time to design and concepting in parallel increases the likelihood of achieving that "something special" that will help shape your business case.

Second, apps need to stay fresh to earn the cherished real estate on peoples' phones and return frequency. Plan early how merchandising, marketing and dedicated app content should stimulate continuous app engagement and gear your organisation to achieve this outcome.

This means incorporating the location and mobility dimensions of the user's context. As context shifts, for instance, from armchair browsing to in-store use, content and merchandising must follow suit. The rules for and logic behind serving this gracefully require dedicated data and strong content and product recommendations, preferably powered by AI, to deliver curated, specific and uncluttered content tailored to the user's needs across different contexts.

Finally, a combination of products from shopping and marketing campaigns, or better yet, gamified and entertaining experiences, is essential for preventing uninstallation.

The retail giants such as Nike, Adidas, Zara, IKEA, H&M and Amazon are now embracing an "app-first" approach. And their adoption sets off a ripple effect, shaping new consumer expectations around convenience, ease of use, experience, service and personalised curation at every shopping moment. This influence cascades down to affect any brand striving to stay competitive.

Fortunately, the transition to headless commerce architectures has facilitated the development and operation of exceptional commerce apps. With a decoupled back-end, brands are strategically positioned to leverage the benefits of app commerce, including features such as consumer apps interacting seamlessly with staff or store apps, encompassing mobile point of sale systems, clienteling, in-store displays and self-service checkouts. While investing in apps can yield superior returns on investment, it's important to note that crafting apps that captivate the audience and foster continuous engagement is an art as demanding as running a web store.

SUCCESSFULLY UTILISING OFFLINE DATA TO HELP TO ENHANCE GOOGLE ADS

Are you struggling to set unified goals across your online and offline strategies? Or experiencing siloed KPIs and organisational structures? The key to unlocking a robust growth trajectory lies not in treating these channels as separate but in leveraging the synergy between them. Using your stores to their full advantage in your performance marketing can unlock a powerful growth engine.

By
Christian Kaad Andersen
Senior PPC Consultant
&
Torje Ingebretsen
Omnichannel Retail Specialist, Google Northern Europe

IN BRIEF

Traditional marketing metrics limit growth. This strategy unlocks it. Leverage omnichannel KPIs and offline data to identify high-value customers and optimise digital campaigns for growth across all channels. Google Ads, fuelled by your first-party data, drive smarter targeting, bidding and, ultimately, more sales and profitable revenue growth. Breaking down silos and focusing on total sales growth is key to outpacing competition.

If omnichannel KPIs and offline first-party data aren't cornerstones of your performance marketing strategy, you're bypassing an invaluable opportunity to surpass traditional commerce metrics and achieve a competitive advantage. But maximising the synergy between online and offline data necessitates a strategic framework. At IMPACT Commerce, our strategy revolves around a three-step process designed to optimise your marketing efforts and enhance customer engagement across all channels.

THE PROFITABLE GROWTH ENGINE

Foundation: test, learn & scale

STEP 1

Define your "true" goal

STEP 2

Build and connect your first-party data to train Google's AI on your goal, using privacy-first measurement

STEP 3

Find the most valuable customers by activating all media, cross-channel

DEFINING GOALS BEYOND COMMERCE

To unlock omnichannel growth you need a holistic approach that paints a clear picture of your overall customer journey and total campaign effectiveness. You should stop relying solely on e-commerce KPIs, and instead define comprehensive business goals that encompass both online and offline sales channels. Develop a new KPI framework that integrates offline data points like in-store visits, in-store conversion rates and in-store sales alongside online metrics.

So, instead of using siloed e-commerce KPIs, you should emphasise total digital-influenced sales, encompassing both online and offline touchpoints to offer a more accurate metric of success in today's omnichannel landscape. Once you have achieved this, you can train Google's AI to deliver on your true business objective:

DRIVE TOTAL SALES GROWTH (E-COMMERCE + STORE)

Increase total sales volume by X% within Y timeframe by measuring e-commerce (web & app) sales and in-store sales to optimise on total sales impact from your digital campaigns.

FUEL THE GOOGLE AI WITH YOUR OFFLINE DATA

Once you have your omni KPIs in place, it's important to connect your first-party data to train Google's AI. AI runs on data, so make sure to build a strong data foundation. Building, connecting and activating your first-party data in a privacy-first and safe way is how you gain a competitive edge.

Failing to leverage your data, however, puts you at risk of encountering significant disadvantages, especially against competitors who are actively using the same AI tools to drive total sales. With everyone having access to similar technology, the true differentiator lies in who can harness the power of their data most effectively. Within omnichannel there are two important first-party data sources to integrate:

01
LOCAL IN-STORE INVENTORY

Create a local inventory feed to show users if the item they are searching for is available in the local store, directly in the Shopping Ads. In addition, show which products are available for immediate store pickup and which products can be available for store pickup within a few days. Currently, only 19% of brands and multibrand retailers use Google local inventory shopping ads, according to the Omnichannel Index 2024.

02
IN-STORE TRANSACTIONS

Connect your point-of-sale (POS) system to Google Ads. This lets you measure online ad clicks that lead to in-store purchases, giving you a complete view of the customer journey and valuable insights, in a way that respects privacy. By feeding these dynamic store sales values into your bidding strategies, Google Ads can optimise campaigns for omnichannel success.

FINDING YOUR MOST VALUABLE CUSTOMERS

Find your most valuable customers by activating all media, across channels. Unify your customer data across online and offline channels to identify your most valuable customers. Use Google to target high-value individuals across platforms, driving omnichannel engagement. By leveraging your customer data across online and offline you can use different tactics to find your most valuable customers:

01
AUDIENCE INSIGHTS

Segment your uploaded store sales data and tailor your message to e.g. returning or most loyal customers. By analysing demographics, interests and behaviour, you can create more targeted ad campaigns that resonate with your ideal customers, both online and offline.

02
SMART BIDDING STRATEGIES

Use Google's automated Smart Bidding strategies, across channels, and factor in your in-store sales data. This allows the AI to optimise your bids based on the likelihood of driving a sale, either online or in-store, maximising your total omnichannel return on investment.

By now it should be clear that by moving beyond commerce limitations and embracing the power of offline data, you can unlock significant growth potential. Aim to eliminate any organisational barriers and adjust the performance KPIs to focus on what truly matters to your business: overall sales growth.

Implement, the strategies we have outlined above, and you'll be on track to leverage Google Ads as a powerful tool to drive holistic business growth and outpace your competitors.

This image was created using AI.

UNLOCKING COMPETITIVE EDGE WITH OMS

The Order Management System (OMS) is key to unleashing a powerful triad essential to commerce: inventory, logistics and fulfillment. Positioned at the intersection of commerce and the supply chain, the OMS paves the way for consumer convenience and provides a competitive advantage that extends beyond 2024.

By *Anders Wedenhahl*
Unified Commerce Consultant

IN BRIEF

Adept management of inventory, logistics and fulfillment is crucial for exceptional service. Challenges such as supply chain complexity only underscore the need for meticulous oversight. By leveraging advanced technology and optimising inventory accuracy through an Order Management System (OMaS), businesses can meet evolving customer expectations and drive profitability. Emphasising real-time insights and leveraging omnichannel capabilities unlocked by OMS paves the way for sustainable growth.

The retail landscape is evolving at a breakneck pace, driven by advancements in technology and shifting consumer expectations. At the heart of this transformation lies the complex interplay between inventory data, logistics and fulfilment – a triad that is becoming increasingly pivotal for businesses aiming to provide exceptional service and convenience to their customers. With a whopping 95% of customers expecting all shipping issues to be resolved during transit, it's crucial to explore how these three elements merge to boost inventory availability and, ultimately, consumer satisfaction.

With the organic growth of e-commerce slowing down, companies should now focus on relevance and profitability. Established companies are losing focus on profitability due to complex operations and obstructed supply chains, both of which lead to increased costs. A shift towards prioritising gross profit and adopting a more local, agile approach in supply, distribution and customer service is advised. This shift is further emphasised in the Nordics where the top reported industry challenges in 2024 include cost of returns, loss of third-party cookies, shipping costs, inflation and supply chain difficulties.

Three of these top five challenges relate to managing orders and inventory, emphasising the importance of mastering this aspect for success in 2024 and beyond. If you're struggling in this area, it's crucial to evaluate the potential opportunity for implementing an OMS and the resulting ROI for your business.

TAKE INVENTORY LEVELS TO THE NEXT LEVEL

Inventory data encompasses the real-time statistics and trends of inventory levels. These serve as the backbone of effective inventory management. It involves thorough tracking of products from the moment they're sourced to the point of sale. By leveraging advanced analytics and AI for predictive modelling, businesses can forecast demand, prevent stockouts and minimise excess inventory, ensuring that they have the right products available at the right place and time. Findings from the Omnichannel Index 2024 reveal that only 17% use filters to display local inventory only.

How accurate is your inventory data? Is it above 80%, 90% or 99%? The further you are from achieving 100% inventory accuracy, the further your business is from reaping the benefits of omnichannel fulfillment and delivering a best-in-class customer experience. By implementing RFID (Radio Frequency Identification) technology, clients of IMPACT Commerce have witnessed a significant improvement in stock accuracy in stores, from 96% to 99.5%. This not only unlocks more items to sell but also instils trust in store staff, customer service and merchandising, as they can rely on the data. Moreover, the brands and retailers avoid overselling, can replenish more accurately and, most important of all, ensure that customers don't experience cancellations or visit stores in vain. This approach provides customers with the freedom to choose how they want their orders fulfilled. With an OMS and omnichannel inventory in place, all omnichannel capabilities are set up for success.

But don't worry, you don't need RFID to up your game on inventory accuracy. By utilising omnichannel inventory systems provided by OMS vendors, your business can take a giant leap towards leveraging real time inventory to fulfil customer demand and meet expectations. It's about managing on-hand inventory, available to sell (ATS), available to order, reserved inventory and inbound inventory (returns and new supplies). This helps provide transparency to both consumers and your internal stakeholders. Again, think about how valuable it is for customer service, store staff and operations to have these real-time insights readily available to finalise a sale. Yet, only (51%) half of the assessed brands and retailers offer its customers get order history on my profile by asking a shop assistant in-store.

REMOVING FRICTION

If your inventory management is on point, then your focus should shift to the complexity of supply and demand channels. Evaluate where you encounter the most complexity within the various streams of supply and demand. Start understanding the reasons behind this complexity by asking yourself the following questions:

01

Do my customers want to purchase in different ways, through new channels, or new formats?

02

Do we leverage our supply chain efficiently, or could we enhance it by activating our stores more, adding new warehouses and engaging with third-party logistics to meet demand and increase supply?

03

Where do we experience the biggest operational costs or time burden: in our channels or in our supply chain?

04

Could we automate more of our processes to lower the cost to serve?

05

Is our current setup capable of scaling fast enough?

In addition, if you're not already doing so, you should track some of the following order KPIs: order accuracy rate, order cycle time, order fulfillment costs, backorder rate, shipping time and delays, order return rates and order lead time.

BENEFITS AWAIT

Once you identify areas of complexity and assess your performance against key performance indicators (KPIs), you can translate these insights into actionable requirements and targets. Implementing an order management system can unlock numerous benefits and opportunities for your business. Recent IMPACT Commerce projects have demonstrated:

- An 85% reduction in order cancellations through optimised fulfillment, such as ship-from-store capabilities
- A tenfold increase in stock availability by sourcing from additional inventory locations to serve multiple channels
- A boost in home delivery rates from 50% to 65% by promoting the lowest cost-to-serve option.
- A 30% increase in monthly sales and a 12% average boost in store turnover through endless aisle strategies
- A 20% rise in online sales through ship-from-store activations
- Over 40% of online orders now utilise Click & Collect services after introducing a one-hour collection option

Finally, it's crucial to consider and define your business fulfillment vision. This vision serves as the primary guide for determining whether and when you should consider investing in an order management system, as your current setup may not adequately support you in achieving this vision.

DISTRIBUTION CENTERS
FULFILLMENT CENTERS
STORES
SUPPLIERS
MANUFACTURERS

SUPPLY COMPLEXITY

DEMAND COMPLEXITY

WALK-IN SHOPPER
IN-STORE PICKUP
CURBSIDE
REMOTE COLLECTION
SHIP FROM DC
SHIP FROM STORE
DROP SHIP

Simplify, Convert, Delight:

MASTERING THE CHECKOUT EXPERIENCE

A clear flow is key to a smooth checkout experience. After all, it shouldn't be hard for customers to pay you. How come so many retailers struggle to get it right?

By
Morten Lybech
Design Lead
&
Anders Andersen
User Experience Designer

IN BRIEF

In the fast-paced world of commerce, the checkout experience can make or break a sale. This article explores the importance of streamlining the payment process for retailers, emphasising the need for simplicity and user-friendliness. By prioritising ease of payment and choice of delivery, businesses can increase conversion rates and foster customer satisfaction rather than data harvesting and tackling abandoned baskets.

In a digital age where convenience reigns supreme, why do some commerce platforms still make it feel like a tedious task to complete a purchase? Let's face it, as customers, we want simplicity. So, why is the checkout process still so complicated? And what can you do to simplify it, so you don't jeopardise sales?

PICK YOUR BATTLES, BUT PICK THIS ONE

In today's competitive market, customer experience is paramount. With countless options at their fingertips, consumers have little patience for inconvenient checkout processes. Studies from Baymard Institute show that 69% of online shopping carts are abandoned before purchase completion, with complex checkout procedures cited as a significant factor.

So why are some retailers still falling short in this crucial aspect? Perhaps it has to do with a failure to prioritise user experience or an overemphasis on data collection. Whatever the reason, the consequences are clear: lost sales and unsatisfied customers. Luckily, these consequences can be avoided, if you:

This image was created using AI.

01
MINIMISE UNNECESSARY FORM FIELDS:

Simplify the checkout process by only requesting essential information from most customers. Remember the context of your platform and customers. The flow should cater to the 99% and not the odd-one-out. Additional fields for these odd cases, e.g. changes in country or separate billing and delivery addresses, should be seamlessly integrated into the UI without disrupting the flow.

02
OFFER GUEST CHECKOUT:

Recognise that not all customers are interested in a long-term engagement. Introducing a guest checkout option caters to those who seek a quick transaction without the hassle of creating an account. We see big platforms like ASOS and Zalando force users to login, which they might get away with purely because of their size and reputation, but most other retailers most likely won't.

03
INTUITIVE PROFILE CREATION:

Seamlessly integrate customer profile creation into the checkout flow. If data collection is necessary, avoid redundancy by pre-filling information gathered earlier. Utilise customer data to personalise the experience, such as setting a local store as the default pickup location if selected. This builds trust in your brand's usage of data by quickly giving the customer a win.

SIMPLICITY SELLS

From intuitive design to seamless integration of payment methods, retailers must prioritise ease of use at every stage of the checkout process. By reducing friction and eliminating unnecessary steps, businesses can streamline transactions and improve conversion rates. According to an analysis conducted by Similarweb, Buy-Now-Pay-Later will for example boost the conversion rate by 2.1 % on average.

Visual aids such as progress indicators and one-click payment options can further enhance the user experience, guiding customers through the checkout process with minimal effort. Additionally,

offering multiple payment options caters to diverse customer preferences, ensuring a frictionless experience for all. According to the Omnichannel Index 2024, 85% of brands and multibrand retailers offer payment via mobile solutions, such as MobilePay, Apple Pay and Google Pay. However, only 13% allow the use of biometric ID to enable the fastest/easiest payment.

Despite its importance, 36% of commerce sites continue to prioritise "Delivery Speed" over "Delivery Date." It's time for retailers to prioritise user-centric clarity over business-centric terminology, ensuring every customer knows exactly when to expect their purchases to arrive. In the fast-paced world of e-commerce, simplicity reigns supreme. By prioritising ease of payments, retailers can increase conversion rates, build trust and foster customer loyalty. In an era where every click counts, it's time to make it easy for customers to give you their money. After all, in the world of e-commerce, convenience is king.

THE BIG WHEN

Customers demand clarity on when they can expect their order(s) to arrive. However, many platforms still use vague terms like "Shipping Speed" instead of providing concrete delivery dates. This approach adds unnecessary complexity to the checkout process, and it forces users to research and calculate delivery times. By simply stating delivery dates or date ranges upfront, retailers can enhance transparency, set customer expec-

tations and improve the overall user experience. This improvement not only streamlines the process but also helps customers better anticipate the moment they will receive their orders. For example, homeware retailer Kop&Kande has effectively allocated valuable space on their product detail page to highlight this information.

CRACKING THE CODE ON TRANSPARENCY AND TRACEABILITY

Product transparency and traceability is becoming a key competitive advantage in what is predicted to become an elimination race for brands. Consumers show a growing demand for sustainable products, and with new regulations coming up, we're witnessing a very interesting historic shift in commerce.

By ***Louise Klüwer***
Sustainability Lead

IN BRIEF

Rising consumer demands and upcoming regulations, such as the Digital Product Passports, make transparency and traceability a game changer in commerce that you don't want to miss out on. We guide you step by step on how to crack the code on transparency and traceability while taking inspiration from some of the frontrunners in this domain. Learn how to utilise the business potential to build your brand, add value to your products, and strengthen the customer experience to earn trust and loyalty.

Consumers are increasingly aware of the environmental and social impact of their shopping habits. Studies show that more than 94% of European consumers say they will stay loyal to transparent brands, and 91% say they want brands to demonstrate that they are making positive choices about the planet in everything they do. Yet, only 1% of brands show environmental footprint of products on their PDP, According to new findings from the Omnichannel Index

2024. Several studies confirm that consumers do indeed back it up with their wallets, with 75% saying they are willing to pay more for a product or service that they believe acts responsibly and does good. Additionally, products with trustworthy ESG claims outperform other products in their category.

In other words, the call for transparency and traceability is louder than ever. Rising consumer demands, coupled with

new regulations such as The EcoDesign for Sustainable Products Regulation as well as the Digital Product Passport and the new rules on Green Claims which follow in its wake, will undoubtedly reshape the commerce landscape. Preparing and adapting to these changes is, however, not only a matter of compliance; it's a strategic opportunity to strengthen customer trust and loyalty, increase satisfaction and drive meaningful revenue growth.

MEET THE FRONTRUNNERS

While we're seeing a positive rise in brands becoming more transparent about their impact on people and planet, primarily driven by the electronics, furniture, jewellery and, to some extent, the fashion industry, a big gap remains on a broader level. To align with consumer demands, upcoming regulations and the current standard of product transparency quality, this gap needs to be addressed.

We know the struggle for quality in sustainability data is real, but the data can't do the job on its own. It's all about turning your strong data foundation into an engaging part of the customer journey – and this part of the process is causing trouble for a large portion of the brands in this Omnichannel Index 2024.

It's surprisingly hard to find great examples, but this scarcity also highlights where multibrand retailers can discover significant untapped potential to strengthen their position and customer relationships. Making progress in this area is an important step towards empowering consumers to make better purchasing decisions and move towards a more sustainable future. In the Omnichannel Index 2024 survey it reveals, that merely 15% of brands and retailers show a clear sustainability commitment, for example by adhering to UN Global Compact, B Corp etc.

The well-known, best-in-class example of brand and product transparency is Patagonia. Perhaps not surprisingly, another committed B Corp, Ganni, also emerges among the frontrunners on how to be transparent on a brand and product level (on chosen products). Ganni effectively translates their communication into concrete and relatable metrics, illustrating how transparency and traceability also serve as a means of consumer education.

Another pioneer in advanced product traceability is SPOOR, whose traceable leather has attracted companies such as Roccamore Shoes, Marimekko and Fredericia Furniture to tap into their technology. SPOOR provides comprehensive data covering the entire product lifecycle. This includes how the leather is responsibly sourced and processed, which is backed up by data and documentation on factors such as climate

impact and animal welfare. This information is traced back to the individual animal. SPOOR also communicates how their innovative tanning methods render the leather biodegradable and compostable at the end of its lifecycle.

What Ganni, SPOOR and other transparent brands realise is that sustainability and ESG data add value to their products and their brand. This not only helps them demonstrate accountability to their customers but also sends a clear signal that they take their customers' sustainability demands seriously, empowering both buyers and sellers of their products.

DIGITAL PRODUCT PASSPORTS:
A GAME CHANGER

The new regulations on EcoDesign for sustainable products, as well as the Digital Product Passports that follow in their wake, mark a historic shift in product transparency and traceability. There's no more hiding, and brands will be exposed if they fail to be transparent or merely show ambition without taking action. An important distinction to highlight here is that consumers prioritise transparency and action over perfection. They value progress, recognising and honouring brands' efforts in taking tangible steps towards sustainability.

Digital Product Passports will function as fully transparent digital journals from which product data can be shared throughout its entire lifecycle. Sustainability data, such as sourcing of materials, environmental footprint, production conditions as well as durability and repairability, will be an essential part of this. The transparency that ensues helps to foster trust, the very foundation for building strong and loyal customer relationships.

UNLOCK THE POWER OF TRANSPARENCY
AND TRACEABILITY IN 5 STEPS

01

Identify the need for data – both from customer insights and regulations – for your brand and products

02

Secure a robust Product Information Management (PIM) system for accurate and accessible product information, crucial for trust-building and compliance with upcoming Digital Product Passport regulations

03

Implement a PIM-powered sales catalogue and organise all business data in a Data Map to create a complete overview

04

Eliminate redundant data handling costs by consolidating data governance and adopting AI for product information creation and validation

05

Turn your solid data foundation into a strong and engaging customer experience, beginning with your most important products

So, are you ready for the transparency transition? If you haven't already embarked on this journey, now's the time. Begin by building a robust data foundation that can be transformed into a customer experience that sets you apart from your competitors and strengthens customer relationships. Transparency is a crucial factor for companies to empower and guide end-consumers toward better purchasing decisions – a need that is more critical than ever. Preparing for and adapting to these changes and evolving demands is not just a matter of compliance; it presents a strategic opportunity to strengthen customer trust and loyalty, increase satisfaction and drive meaningful growth.

CUSTOMER SERVICE = CUSTOMER EXPERIENCE

The times of perceiving customer service as a separate discipline or a hidden department somewhere in your operation is over. Paying attention to the customer service part of the omnichannel customer experience is more important than ever in a world where personalised and human interaction has become a differentiator.

By **Kristine Thygesen**
Salesforce Business Consultant

IN BRIEF

Customer service plays a pivotal role in shaping brand perception and fostering loyalty. As customers are increasingly prioritising experiences over products, service professionals suddenly emerge as downright frontline brand ambassadors. Recognising their importance, businesses must prioritise coherence across all touchpoints and view service initiatives as opportunities for revenue growth and brand loyalty. By embracing this holistic approach, businesses can forge lasting relationships and drive revenue.

This image was created using AI.

Automation and AI is key to offering great customer service throughout the customer journey. However, a top-notch experience only occurs when you recognise your customer service agents as being one of your most valuable real-life brand ambassadors. After all, they're the ones who interact with your customers firsthand throughout their journey with your company.

No less than 73% of customers expect multibrand retailers to understand their unique needs and expectations, yet 56% say most companies treat them like numbers. Consumers are expecting a certain level of experience throughout every touchpoint they have with a brand, not only in the purchase part of the customer journey – which is why you shouldn't underestimate the importance of investing and paying attention to the post-purchase area.

GETTING CLOSER TO YOUR CUSTOMERS

Customer service quietly influences everyday purchasing decisions more than is often acknowledged. Just picture a customer busy selecting an item among numerous brands that offer similar products at comparable prices. What distinguishes the brand they choose from the ones they overlook?

When customers opt for a specific brand, they aren't just demonstrating trust and loyalty; they expect something in return that validates their choice of your brand over others. This expectation is further heightened when customers opt to join a brand's loyalty programme, where they anticipate even greater rewards and benefits. Specifically, customers expect personalised experiences tailored to their behaviour, such as receiving automated emails based on their interactions with the brand's website. However, currently only 16% of brands and retailers send automated emails based on website behaviour within 48 hours accoring to the Omnichannel Index 2024. Additionally, customers look for tangible rewards, such as monetary benefits, discounts, exclusive offers or opportunities available to loyalty club members. Here, the Omnichannel Index 2024 casts light on the importance of this, with two-thirds (65%) offering monetary benefits for their loyalty club members, and over half (56%) treating them to other exclusive benefits.

SERVICE PROFESSIONALS OR FIRST-LINE BRAND AMBASSADORS

In an era where an increasing number of consumers and business buyers stress the equivalence of experience to products (80% in 2020 compared to 88% in 2022 and counting), service professionals must step into the role of frontline brand ambassadors. Positioned uniquely, they not only maintain existing customer loyalty but also have the power to craft experiences that compel consumers to choose the brand again in the future. According to this year's Omnichannel Index, they're stepping up the pace, with 50% of brands and multibrand retailers offering chat services via social media or on their website between 9-15, Monday-Friday.

Therefore, in today's ever-evolving landscape of consumer expectations, the coherence of brand experience across all touchpoints, be it digital or physical, is a key differentiator that brands must prioritise in their omnichannel strategy.

Customers demand prompt responses to inquiries, expecting to receive email replies within a few hours, even minutes for some customer segments. Currently, only 52% of brands and multibrand retailers answer email inquiries within

the first 4 hours. Accessibility is key to ensuring that brands are present where and when consumers are, meaning the channel strategy must consider availability via chat, social media channels or in app. Moreover, brands are now expected to extend their support beyond traditional opening hours, offering digital assistance when needed. Ease of communication is crucial, with consumers seeking swift responses and assistance. Personalised communication has become the norm, with customers expecting interactions that feel human rather than robotic. In essence, brands must adapt to meet these evolving expectations by ensuring seamless experiences that prioritise accessibility, responsiveness and personalised communication.

FROM COST CENTRE TO REVENUE DRIVER

Recognising that the customer service experience extends far beyond individual support cases is essential for providing the personalised and empathetic brand engagement that customers seek. In this perspective, it's crucial to view the customer service team not as a cost centre but as a revenue driver.

Service professionals must have access to comprehensive information encompassing every aspect of a customer's journey — from initial marketing interactions to online purchases and sales engagements. By breaking away from the norm of disjointed experiences, where customers often feel like they're interacting with separate departments rather than a unified entity, businesses can create seamless and consistent interactions. A staggering 60% of customers report feeling this disconnect, while 66% find themselves

having to repeatedly convey information to different representatives. To combat this, brands and multibrand retailers must strive for a digital landscape where all departments have a 360-degree view of the customers. This holistic approach ensures that every customer interaction is informed, cohesive and leads to a superior experience that fosters loyalty and drives revenue growth.

Redefining customer service as an encompassing part of the entire customer experience is essential. By ensuring coherence across all touchpoints and viewing service initiatives as opportunities for revenue growth and brand loyalty, businesses can forge lasting relationships with their customers.

Seamless Shopping:

HARMONISING YOUR RETAIL EXPERIENCE

Seamless shopping means integrating all your retail channels smoothly. Get this right, and you're set to revolutionise your omnichannel game and boost satisfaction and sales. Curious? Let's dive deeper.

By **Martin Kracht**
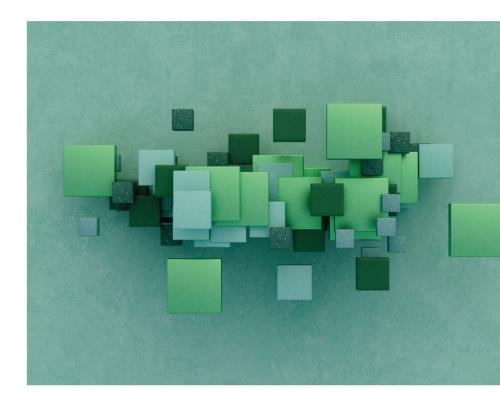Senior Commercial Business Partner

IN BRIEF

Blending product information, digital content and essential business data across all channels isn't just advantageous in today's retail world; it's a necessity. This integration can transform your approach, making your brand's story consistent and compelling, enhancing the customer experience and setting your business up for greater success. Many brands and multibrand retailers are already are already well on their way with the integration, with 60% storing customers basket across devices for seamless shopping, according to the Omnichannel Index 2024.

In the rapidly evolving landscape of retail, engaging with customers through multiple channels –online, in-store and via mobile apps – has become more than just a strategy. It's becoming a necessity for survival and growth. The seamless integration of these touchpoints is what defines omnichannel retailing, a concept that has transformed from a buzzword into a critical component of retail success.

As we dive deeper into the mechanisms of omnichannel excellence, it's important to recognise that the foundation of this approach lies in harmonising product details, digital content and key business information to create a cohesive and compelling shopping journey.

MULTICHANNEL, UNIFIED VOICE

To shine across all sales channels, it's crucial to keep your product details, digital narratives and critical business data well-organised. Think of it as a choir, where each part – in this case product systems, digital content and business data – sings in harmony. This coherence guarantees that customers enjoy a consistent and seamless shopping experience, no matter where or how they engage with your brand.

A CHANNEL-AGNOSTIC MATCH OF DATA AND CONTENT

Navigating the retail landscape requires more than just showing up; you need to stand out. By marrying your product information with vibrant digital content, your offerings don't just get noticed – they captivate. Meanwhile, ensuring that your business data synchronises across all platforms safeguards your brand's reliability, telling a story that's both consistent and appealing.

The essence of seamless integration lies in the smooth, uninterrupted flow of product information, digital content and business data. This synergy ensures that no matter if customers browse online, tap through a mobile app or stroll through your physical store, they will find what they're looking for: accurate, engaging product details. Mastering this flow means mastering retail in the digital age.
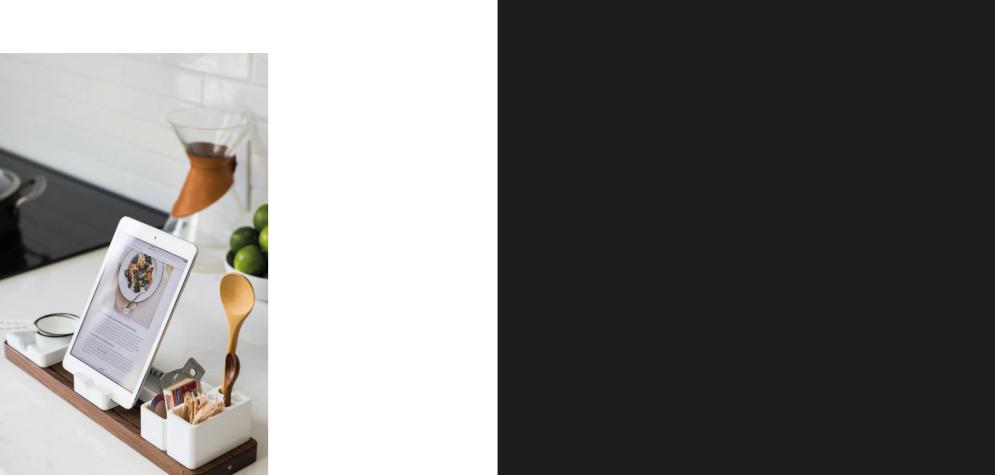
RETAIL EXCELLENCE:
THE CASE OF IMERCO

Take inspiration from Imerco, a leader in Denmark's retail sector specialising in homeware. By reimagining its digital presence with a customer-centric online platform, Imerco connected its online and offline worlds, resulting in a 12% boost in conversion rates, a 38% rise in website traffic and a remarkable 54% growth in online sales. But this story isn't just about good numbers; it's a testament to the power of innovation and teamwork in rewriting the rules of retail success.

WHERE
TO BEGIN

Eager to embark on your seamless shopping adventure? Start by mapping out the customer journey across all touchpoints. This map will guide you to potential integration points, shining a light on the status of your tech and analytics in delivering a unified customer experience. Align your content and customer service strategies to ensure consistency across channels, each with its unique strengths. Remember, the goal is to create a shopping experience that feels personal and effortless for every customer.

In the fast-paced world of retail, standing still is not an option. Embracing a seamless shopping strategy is more than a pathway to success, it's a commitment to your customers, promising them a shopping journey as delightful and unique as your brand. Ready to take the first step?

Stand Out from the Crowd:

WHY DIFFERENTIATED LOYALTY PROGRAMMES ARE CRUCIAL FOR TODAY'S MULTIBRANDS AND RETAILERS

Amidst a sea of generic loyalty initiatives, brands who stand out from the crowd with a truly differentiated loyalty programme tailored to their core target group are thriving. How do they do it? Through a combination of creating genuine emotional connections, building mental (brand) availability, securing repeat customers and leveraging cutting-edge technology.

By **Kenni Wiltoft Rostgaard**
Senior Strategic Consultant

IN BRIEF
The impact of well-designed and well-executed loyalty programmes on business performance is undeniable. The key is to ensure that they aren't only aligned with customer preferences and expectations but also have the right mixture of benefits to appeal to both the rational and emotional aspects of consumer behaviour.

As we delve into this year's Omnichannel Index 2024 results, a focus on loyalty quickly reveals a predominant emphasis on monetary benefits that overshadows the exploration of more exclusive rewards. Crafting effective loyalty programmes is undoubtedly challenging, and industry nuances significantly influence outcomes. According to the Omnichannel Index 2024, 65% of brands and multibrand retailers offer monetary benefits to their customers.

Our extensive work with a diverse range of companies has provided us with insights into loyalty programmes and their significant potential to benefit businesses. This includes helping a top-tier European fashion brand achieve a 55% increase in the transactional value for its club members compared to non-members as well as assisting a fast-growing Danish lifestyle brand in achieving a 211% increase in a four-year average Customer Lifetime Value (CLV) through a community programme and a hyper-personalised approach. These numbers only underscore the strong imperative for differentiating loyalty programmes.

THE GREAT DIFFERENTIATOR: EMOTIONAL LOYALTY

Creating emotional loyalty sets brands apart. But, to succeed, it must resonate with your target group. In the 2024 business ecosystem, where every consumer choice is a battleground, the pressure to grab attention is growing as we're bombarded with advertising and witnessing new aggressive competitors regularly emerge onto the scene. The world of loyalty creation is obviously a critical area for businesses, yet we're still witnessing numerous, at best, half-hearted attempts to conceptualise and establish a loyalty programme. Often, these efforts fall short on various key elements and fail to cover important areas.

This perpetuates the ongoing saturation of today's market, leading customers to perceive loyalty programmes as largely undifferentiated. Unfortunately, many brands embark on loyalty strategies without a deep understanding of the essential elements that can make or break these programmes. However, the significance of loyalty programmes cannot be overstated. Loyalty studies from McKinsey and BCG show that the brands that get it right experience remarkable impact because loyalty is a pivotal mechanism for driving business through word-of-mouth, increased purchase frequency, elevated engagement, Share of Wallet (SOW) and higher brand preference.

These findings align with what we observe among our clients who have a well-conceptualised loyalty programme in place. Such programmes lead to repeat customers with emotional loyalty, characterised by a psychological preference and affective attachment to a brand, as exemplified by the case of Danish multi-category retail chain, Søstrene Grene.

Emotional loyalty ensures that customers not only remember the brand but are also motivated to advocate for it. This is important, as 88% of consumers say that they trust recommendations from people they know above all other forms of marketing messaging, according to a study from Nielsen. This type of mental availability with your customers is crucial for your brand's growth. Additionally, loyalty programmes can act

as a strategic lever for collecting valuable first-party data that can be used for targeting, more granular segmentation for better personalisation and communication in the one-to-one channels, as well as fuel for optimising algorithms in advertising platforms such as Meta and Google.

Research also indicates that the gap between top-tier and lower-tier loyalty programmes is narrowing, and the ability of the former to influence consumer choice is diminishing. Detecting a 52% difference between the best and worst-performing categories within the loyalty phase in this year's Omnichannel Index only affirms this finding. This suggests that basic loyalty programmes are on their way out, highlighting how important it is for brands to stand out with creative strategies and unique offerings.

BALANCING RATIONAL AND EMOTIONAL REWARDS

The principle of value exchange – the mutual benefit derived from the relationship between a company and its customers – lies at the heart of every loyalty programme. For customers, the value isn't limited to tangible rewards; it also comes in the form of the recognition, personalisation and exclusive experiences they receive. From the company's perspective, the value comes from having more attached customers, and, obviously, improved business outcomes.

A well-designed loyalty programme emphasises this value exchange by ensuring that the benefits on offer are both relevant and meaningful to the customer. Such a programme masterfully blends monetary and non-monetary rewards, addressing both the rational and emotional aspects of consumer behaviour. As the data in this year's Omnichannel Index clearly shows, this is an area where

we see continued struggle. In fact, more than 60% of the researched brands offer monetary benefits in exchange for signing up, whereas 56% offer exclusive benefits.

Monetary benefits, such as discounts and coupons, may serve as effective entry points into a loyalty programme but probably fail to create lasting brand

memories. Conversely, non-monetary rewards, such as exclusivity and VIP events, foster emotional connections through experiences but might not attract initial participation. The challenge lies in integrating these elements to craft a compelling loyalty experience.
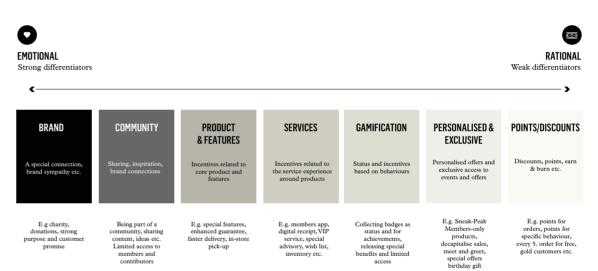
EMOTIONAL
Strong differentiators

RATIONAL
Weak differentiators

BRAND	COMMUNITY	PRODUCT & FEATURES	SERVICES	GAMIFICATION	PERSONALISED & EXCLUSIVE	POINTS/DISCOUNTS
A special connection, brand sympathy etc.	Sharing, inspiration, brand connections	Incentives related to core product and features	Incentives related to the service experience around products	Status and incentives based on behaviours	Personalised offers and exclusive access to events and offers	Discounts, points, earn & burn etc.
E.g charity, donations, strong purpose and customer promise	Being part of a community, sharing content, ideas etc. Limited access to members and contributors	E.g. special features, enhanced guarantee, faster delivery, in-store pick-up	E.g. members app, digital receipt, VIP service, special advisory, wish list, inventory etc.	Collecting badges as status and for achievements, releasing special benefits and limited access	E.g. Sneak-Peak Members-only products, decapitalise sales, meet and greet, special offers birthday gift	E.g. points for orders, points for specific behaviour, every 5. order for free, gold customers etc.

Figure 1 – The emotional-rational continuum

When conceptualising and designing loyalty reward elements for your programme, it's a good idea to explore areas and different types of rewards that resonate and hold meaning for your core target group along the continuum, as illustrated in figure 1. Remember to consider that preferences will differ across

age groups. For instance, Gen Zers may value community-oriented rewards, finding a sense of belonging on platforms like Discord, while Gen Xers might prefer the familiarity of collecting loyalty points with a traditional plastic card at their chosen retail store.

MORE THAN JUST 10% OFF YOUR NEXT PURCHASE

The journey to creating standout loyalty programmes requires a holistic and well-considered approach that encompasses concept development, technical enablement and effective activation. This includes defining the programme's purpose and customer experience, leveraging technology to support it and ensuring operational excellence. In other words, it needs to be more strategically rooted than just offering a 10% discount on the next purchase. By focusing on these areas, businesses can develop loyalty programmes that not only attract but also retain customers in a crowded market. Therefore, if you were to hire a Head of Loyalty, you would want them to start out by nailing your programme's purpose and gaining a deep understanding of your customers' needs, motivation and behaviour.

EMERGING TRENDS ARE RESHAPING LOYALTY PROGRAMMES

The landscape of loyalty programmes is rapidly evolving and being shaped by groundbreaking technological advances and increased consumer demands. The future of successful loyalty programmes belongs to those who can leverage these trends and offer more personalised, engaging and valuable experiences to their members. It could be programmes that:

- Enable hyper-personalisation, for example by using AI to enhance engagement and allow for more tailored, exclusive experiences (often established from collabs or strategic partnerships)
- Provide immersive gamification with more deeply connected loyalty programmes run through an app (less than one-third of the brands researched currently offer an app!)
- Incorporate mobile wallets and digital collectibles (such as NFTs) as new forms of value
- Establish brand communities, particularly for Gen Z consumers, by fostering a sense of belonging and shared values

In the last couple of years, across IMPACT Commerce, we've been working with clients to focus more on these areas, which are all great additions to help make your programme stand out from the crowd. But ultimately, it all comes down to what ignites brand loyalty among your customers.

PANDÖRA

PLACING CONFIDENCE IN MARKETING PAYS OFF

We sat down with Kasper Klit, Director of Paid Media at Pandora, to understand how their innovative strategies in digital marketing and customer data have propelled them to the forefront of their industry.

PANDORA HIGHLIGHTS

- Omnichannel ROI model implemented, enabling weekly reviews of sales performance and adjustments to marketing budgets

- Marketing is regarded as the primary growth driver – also at the C-level

- Transitioned from 35 yearly inside-out product-led campaigns to 5 consumer-led brand campaigns, complemented by an agile, always-on product marketing setup use of plastic bags by 75% in one year

How did you bring about this success story?

"Marketing is defined as our #1 growth driver. Everyone involved understands the importance of striving to be best in class, fostering a high level of accountability across all practitioners in the company. It also means that our focus is on growth through excelling in marketing ROI and building an attractive brand, rather than solely focusing on growth through wider distribution. We call it data-driven consumer growth. This also puts marketing on the spot, as we're expected to deliver most of the like-for-like or incremental growth."

What initiatives have made a big impact?

"Continuous innovation. In practice this means we execute +150 incrementality experiments annually to help inform and improve our digital marketing execution. We've managed to scale that conceptual idea at a global scale and have been doing it for +3 years. And we don't just do classic A/B website testing, we do proper multi-cell incrementality testing across all touchpoints in the business and all stages of the consumer journey. Another initiative that has been a game changer is turning our marketing planning upside down. Instead of doing 35 product-driven launch campaigns a year, we now only do five consumer-driven brand campaigns. And then product marketing is 100% automated with both push and pull and based on both internal and external triggers."

Can you share your approach with us?

"Data gives us the edge. For the past three years, we've been working relentlessly on creating omnichannel ROI sales modelling. In all modesty, I believe we're now one of the leading companies in the world when it comes to transparency in marketing ROI across digital and in-store channels. So now we conduct weekly sales modelling and adjust budgets and actions accordingly. This means that when Annie in the US orders styles one week, we're able to see how marketing and sales have performed the following week."

Can you share some advice?

"Make sure to hire team members and agencies who complement each other, instead of hiring five people with the exact same background. My second piece of advice would be to ensure that you always have senior management backing and, ideally, their involvement. This is a cliché, but it does matter. Demand time with your senior stakeholders and make sure to effectively communicate the benefits, complexity and risks associated with what you're doing. Third, opt for A/B/C/D split testing instead of just regular A/B split testing. And, finally, make sure to expand beyond your website and include a wider range of touchpoints and stages in the customer journey."

ELGIGANTEN

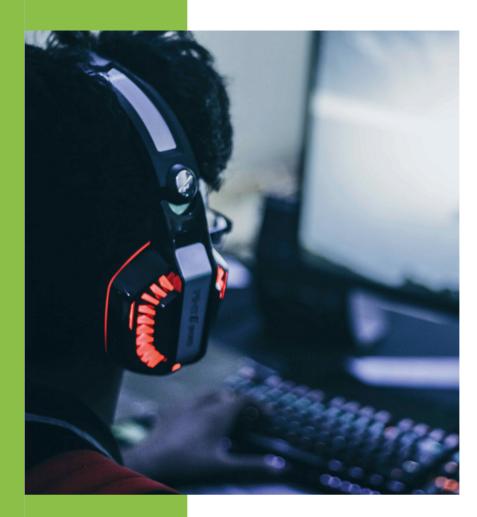# MAKING SIGNIFICANT STRIDES IN SUSTAINABILITY

We met up with Peter Stedal, Managing Director of Elgiganten Denmark, to hear his thoughts on the state of sustainability in commerce and what they have done to excel in this crucial area.

ELGIGANTEN'S HIGHLIGHTS

- Targeting for 10% of turnover from circular revenue streams

- Through Elcare, over 600,000 products are repaired in the Nordics yearly, and that includes products sold by competitors. Implemented customer payment for plastic bags in 2017, four years before it became national law, and reduced the use of plastic bags by 75% in one year

- With over four million spare parts available, customers are given the opportunity to repair and restore products

- Implemented secondhand sale of refurbished phones with a 24-month guarantee

- Implemented customer payment for plastic bags in 2017, four years before it became national law, and reduced the use of plastic bags by 75% in one year

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What makes Elgiganten one of the best performing companies within the Sustainability and Compliance discipline?

"Over the last decade we've done a lot of things without thinking too much about it, simply because it's been natural and right for us. For us, it's also about stepping up as market leaders and, quite frankly, just using common sense. We've embedded sustainability throughout the organization so it's not just a separate department but part of everyone's work. No single person shoulders all the responsibility – sustainability should permeate everything and impact everyone. It's simply a part of our everyday life."

What specific initiatives have made a big impact?

"We've focused on internal improvements first and worked on reducing our own direct emissions. We've been early adopters, operating with energy management systems in our stores to minimise energy consumption, optimising logistics including route planning and last-mile delivery. We've been open and good at testing, piloting, learning and optimising."

What approach did you adopt?

"We don't go out and communicate or promote something as "green." For me, it's about credibility and responsibility. We're doing a lot, but there's still a lot more to do. And this journey never stops. We've chosen initiatives that make a difference and suit our company. As we see it, we're not only part of the problem but also part of the solution. To provide an example: if every European household had a dishwasher, it could save 83% of water and 61% of energy compared to doing dishes by hand."

Any advice to share?

"Engage and involve employees. You undoubtedly have many resources in your own company that can help, so start by getting people involved. And start slowly and steadily – don't overcomplicate it; make sure people can feel it on a personal level so that they really want to make a difference. On that note, choose your focus wisely. We've selected 2-3 key elements that make a difference, are easy to understand and align with our company strategy. These allow us to discuss them internally, take pride in them and build upon them."

Get in touch

READY TO TRANSFORM INSIGHTS INTO GROWTH?

Take the first step toward omnichannel excellence
– scan the code for even more in-depth data, exclusive insights and actionable strategies.

Scan the QR code and Request information.

Kasper Holst
Group CEO
Impact Commerce

Tanja Winterberg
Retail & Apps Performance Specialists Manager
Northern Europe
Google

FULL INDEX 2024

BRAND	COUNTRY
A	
A.S.ADVENTURE	BELGIUM
ACNE STUDIOS	SWEDEN
ACTION	THE NETHERLANDS
ÅHLÉNS	SWEDEN
AKADEMIBOKHANDELN	SWEDEN
AKADEMIKA	NORWAY
ALBERT HEIJN	THE NETHERLANDS
APOTEK HJÄRTAT	SWEDEN
APOTEK1	NORWAY
APOTEKET	SWEDEN
APRIL PLANET PARFUM	BELGIUM
ARK BOKHANDEL	NORWAY
ARKENZOO.SE	SWEDEN
ARKET	DENMARK
ARKET	FINLAND
ARKET	SWEDEN
B	
BABYSAM	DENMARK

BRAND	COUNTRY
BADEMILJØ	NORWAY
BAHNE	DENMARK
BANG & OLUFSEN	DENMARK
BARNAS HUS	NORWAY
BAUHAUS	DENMARK
BAUHAUS	SWEDEN
BEIJER	SWEDEN
BELLEROSE	BELGIUM
BETER BED	THE NETHERLANDS
BEVER	THE NETHERLANDS
BIK BOK	SWEDEN
BILKA	DENMARK
BILTEMA	DENMARK
BILTEMA	NORWAY
BILTEMA	SWEDEN
BILXTRA	NORWAY
BIO-PLANET	BELGIUM
BJÖRN BORG	SWEDEN
BLOKKER	THE NETHERLANDS

BRAND	COUNTRY
BOCONCEPT	DENMARK
BOG & IDÉ	DENMARK
BOHUS	NORWAY
BOLIA	DENMARK
BOLIA	SWEDEN
BOLIST	SWEDEN
BOYS OF EUROPE	NORWAY
BR	DENMARK
BRICO	BELGIUM
BROTHERS	SWEDEN
BYGGERN	NORWAY
BYGGMAKKER	NORWAY
BYGGMAX	NORWAY
BYGGMAX	SWEDEN
BYGMA	DENMARK
B-YOUNG	NORWAY
C	
CALVIN KLEIN	COUNTRY

BRAND	COUNTRY
CARAT	DENMARK
CARLINGS	NORWAY
CARLINGS	SWEDEN
CARRÉ	DENMARK
CERVERA	SWEDEN
CHANGE	DENMARK
CHANGE	SWEDEN
CHILLI.SE	SWEDEN
CLAS OHLSON	NORWAY
CLAS OHLSON	SWEDEN
COLRUYT	BELGIUM
COMFORT	NORWAY
COMPANYS	DENMARK
COOLBLUE	BELGIUM
COOLBLUE	THE NETHERLANDS
COS	DENMARK
COS	SWEDEN
CUBUS	NORWAY
CUBUS	SWEDEN

BRAND	COUNTRY
D	
DAVIDSENS TØMMERHANDEL	DENMARK
DE BIJENKORF	THE NETHERLANDS
DECATHLON	BELGIUM
DEICHMANN	DENMARK
DEICHMANN	SWEDEN
DELHAIZE	BELGIUM
DIN TØJMAND	DENMARK
DINSKO	SWEDEN
DOUGLAS	THE NETHERLANDS
DOZ APOTEK	SWEDEN
DRESSMANN	NORWAY
DRESSMANN	SWEDEN
E	
ECCO	DENMARK
ELECTRO WORLD	THE NETHERLANDS
ELEKTROIMPORTØREN	NORWAY
ELGIGANTEN	DENMARK
ELGIGANTEN	SWEDEN

BRAND	COUNTRY
ELKJØP	NORWAY
ELON	SWEDEN
ELON	NORWAY
EM HOME INTERIOR	SWEDEN
EPLEHUSET	NORWAY
ESPRIT	THE NETHERLANDS
ETOS	THE NETHERLANDS
EUROPRIS	NORWAY
EUROSKO	NORWAY
EXTRA LEKER	NORWAY
F	
FAGMØBLER	NORWAY
FARGERIKE	NORWAY
FELLESKJØPET	NORWAY
FILIPPA K	NORWAY
FLÜGGER	DENMARK
FLÜGGER	NORWAY
FLYING TIGER COPENHAGEN	DENMARK

BRAND	COUNTRY
FNAC	BELGIUM
FOOT LOCKER	THE NETHERLANDS
FRI BIKESHOP	DENMARK
G	
GAMMA	THE NETHERLANDS
GANNI	DENMARK
GANT	SWEDEN
GARANT	DENMARK
GAUSDAL LANDHANDLERI	NORWAY
GIGANTTI	FINLAND
GINA TRICOT	DENMARK
GINA TRICOT	NORWAY
GINA TRICOT	SWEDEN
G-STAR RAW	THE NETHERLANDS
GUDRUN SJÖDÉN	SWEDEN
H	
H&M	DENMARK

BRAND	COUNTRY
H&M	THE NETHERLANDS
H&M	NORWAY
H&M	SWEDEN
HAGELAND	NORWAY
HARALD NYBORG	DENMARK
HELSAM	DENMARK
HEMA	THE NETHERLANDS
HEMTEX	SWEDEN
HIFI KLUBBEN	DENMARK
HIFI KLUBBEN	SWEDEN
HOME & COTTAGE	NORWAY
HORNBACH	THE NETHERLANDS
HORNBACH	SWEDEN
HUMAC	DENMARK
HUMMEL	DENMARK
HUNKEMÖLLER	THE NETHERLANDS
HUNKEMÖLLER	SWEDEN

I

BRAND	COUNTRY
ICA	BELGIUM
ICI PARIS XL	THE NETHERLANDS
IITTALA	FINLAND
IKEA	BELGIUM
IKEA	DENMARK
IKEA	FINLAND
IKEA	THE NETHERLANDS
IKEA	NORWAY
IKEA	SWEDEN
ILLUMS BOLIGHUS	DENMARK
ILVA	DENMARK
IMERCO	DENMARK
INDISKA	SWEDEN
INETDATA	SWEDEN
INNO	BELGIUM
INTERFLORA	DENMARK
INTERFLORA	NORWAY
INTERSPORT	DENMARK
INTERSPORT	FINLAND
INTERSPORT	NORWAY
INTERSPORT	SWEDEN

J

BRAND	COUNTRY
J.LINDEBERG	SWEDEN
JACK & JONES	DENMARK
JACK & JONES	NORWAY
JACK & JONES	SWEDEN
JAPAN PHOTO	NORWAY
JBC	BELGIUM
JEM & FIX	DENMARK
JOHANNES FOG	DENMARK
JULA	NORWAY
JULA	SWEDEN
JUMBO	THE NETHERLANDS
JUTTU	BELGIUM
JYSK	DENMARK
JYSK	NORWAY
JYSK	SWEDEN

K

BRAND	COUNTRY
KÆRE BØRN	DENMARK
KAPPAHL	SWEDEN
KAPPAHL	NORWAY
KARWEI	THE NETHERLANDS
KAUFMANN	DENMARK
KICKS	NORWAY
KICKS	SWEDEN
KID INTERIØR	NORWAY
KIDS COOLSHOP/COOLSHOP.DK	DENMARK
KITCH'N	NORWAY
KJELL & COMPANY	SWEDEN
KOP & KANDE	DENMARK
K-RAUTA	BELGIUM
K-RAUTA	FINLAND
K-RAUTA	SWEDEN
KRËFEL	BELGIUM
KRONANSAPOTEK	SWEDEN
KRUIDVAT	THE NETHERLANDS
KWANTUM	THE NETHERLANDS

L

BRAND	COUNTRY
LAGER157	SWEDEN
LAGERHAUS	SWEDEN
LAKRIDS BY BÜLOW	DENMARK
LAND & FRITID	DENMARK
LEEN BAKKER	THE NETHERLANDS
LEGEKÆDEN	DENMARK
LEGO	DENMARK
LEKIA	SWEDEN
LES DEUX	DENMARK
LEVI STRAUSS	SWEDEN
LEXINGTON	SWEDEN
LINDEX	FINLAND
LINDEX	NORWAY
LINDEX	SWEDEN
LUCARDI	THE NETHERLANDS
LUKSUSBABY	DENMARK
LYKO	SWEDEN

BRAND	COUNTRY
M	
MAGASIN	DENMARK
MAISONS DU MONDE	BELGIUM
MARIMEKKO OYJ	FINLAND
MASKU KALUSTETALO OY	FINLAND
MATAS	DENMARK
MATCH FASHION	NORWAY
MAXBO	NORWAY
MAXI ZOO	DENMARK
MEDIAMARKT	BELGIUM
MEDIAMARKT	THE NETHERLANDS
MEGAFLIS	NORWAY
MEKONOMEN	NORWAY
MEKONOMEN	SWEDEN
MENY	NORWAY
MESSAGE	DENMARK
MESTER GRØNN	NORWAY
MIO	SWEDEN
MOBELMÄSTERNA	SWEDEN
MØBELRINGEN	NORWAY

BRAND	COUNTRY
MONKI	SWEDEN
MONTANAFURNITURE	DENMARK
MR. INDKØBSFORENINGENEJF 1964	DENMARK
MUSTI JA MIRRI OY	FINLAND
N	
NAME IT	DENMARK
NATURKOMPANIET	SWEDEN
NELSON SCHOENEN	NETHERLANDS
NETONNET	NORWAY
NETONNET	SWEDEN
NEW BALANCE	THE NETHERLANDS
NEYE	DENMARK
NIKE	DENMARK
NIKE	THE NETHERLANDS
NORLI	NORWAY
NORMAL	DENMARK
NORRØNA	NORWAY

BRAND	COUNTRY
O	
OBS BYGG	NORWAY
OLE LYNGGAARD	DENMARK
OMODA	THE NETHERLANDS
ONLY	DENMARK
ONLY	SWEDEN
ØNSKEBØRN	DENMARK
P	
PANDORA	DENMARK
PANDORA	SWEDEN
PANDURO	NORWAY
PANDURO	SWEDEN
PAS NORMAL	DENMARK
PEAK PERFORMANCE	DENMARK
PEAK PERFORMANCE	SWEDEN
PETS PLACE	THE NETHERLANDS
PIECES	DENMARK
PILGRIM	DENMARK
PLANET NUSA	DENMARK

BRAND	COUNTRY
PLANTAGEN	NORWAY
PLANTAGEN	SWEDEN
PLANTORAMA	DENMARK
PLAZA.DK	DENMARK
POLARN O. PYRET	SWEDEN
POWER	DENMARK
POWER	NORWAY
POWER	SWEDEN
PRAXIS	THE NETHERLANDS
PRINCESS	NORWAY
PUNKT 1	DENMARK
Q	
QUINT	DENMARK
R	
RAINS	DENMARK
RITUALS	DENMARK
RITUALS	THE NETHERLANDS

BRAND	COUNTRY	BRAND	COUNTRY	BRAND	COUNTRY	BRAND	COUNTRY
RITUALS	SWEDEN	SØSTRENE GRENE	DENMARK	STOCKMANN	FINLAND	TØJEKSPERTEN	DENMARK
RIZZO	SWEDEN	SØSTRENE GRENE	NORWAY	STOF & STIL	DENMARK	TOKMANNI	FINLAND
S		SØSTRENE GRENE	SWEDEN	STOF 2000	DENMARK	TOM&CO	BELGIUM
		SOTKA	FINLAND	STORMBERG	NORWAY	TOMMY HILFIGER	THE NETHERLANDS
SALLING	DENMARK	SOVA	SWEDEN	SUOMALAINEN KIRJAKAUPPA OY	FINLAND	TONY'S CHOCOLONELY	THE NETHERLANDS
SAMSØE & SAMSØE	DENMARK	SPAR KJØP	NORWAY	SVENSSONS	SWEDEN	TORFS	BELGIUM
SCOTCH & SODA	THE NETHERLANDS	SPEJDERSPORT	DENMARK	SWEDOL	SWEDEN	**U**	
SELECTED	DENMARK	SPORT 1	NORWAY	SWISS SENSE	THE NETHERLANDS		
SEPHORA	DENMARK	SPORT 24	DENMARK	**T**		UR & PENN	SWEDEN
SHAPING NEW TOMORROW	DENMARK	SPORT OUTLET	NORWAY			**V**	
SILVAN	DENMARK	SPORT2000	THE NETHERLANDS	T. HANSEN	DENMARK		
S-KAUPAT	FINLAND	SPORTMASTER	DENMARK	T. HANSEN	NORWAY	VANDEN BORRE	BELGIUM
SKEIDAR	NORWAY	SPORTS DIRECT	BELGIUM	TEAM SPORTIA	SWEDEN	VANHAREN	THE NETHERLANDS
SKETCHERS	DENMARK	STADIUM	FINLAND	TEKLA	DENMARK	VERKKOKAUPPA	FINLAND
SKJOLD BURNE VINHANDEL	DENMARK	STADIUM	SWEDEN	TERSTAL	THE NETHERLANDS	VERO MODA	DENMARK
SKOPUNKTEN	SWEDEN	STANDAARD BOEKHANDEL	BELGIUM	THE STING	THE NETHERLANDS	VERO MODA	NORWAY
SKORINGEN	NORWAY	STARK	DENMARK	THULE	SWEDEN	VERO MODA	SWEDEN
SKORINGEN (SHOE-D-VISION)	DENMARK	STARK	FINLAND	TIFFANY & CO	BELGIUM	VIBHOLM	DENMARK
SKOUSEN	DENMARK	STJÄRNURMAKARNA	SWEDEN	TIGER OF SWEDEN	SWEDEN	VIC	NORWAY

BRAND	COUNTRY		BRAND	COUNTRY
VILA	DENMARK		ZEB	BELGIUM
VITA	NORWAY		ZEEMAN	THE NETHERLANDS
VOLT	SWEDEN		ZIENGS	THE NETHERLANDS
			ZIZZI	DENMARK
			ZOO.SE	SWEDEN

W

WAGNER	DENMARK
WE FASHION	THE NETHERLANDS
WEBHALLEN	SWEDEN

OTHERS

& OTHER STORIES	DENMARK
& OTHER STORIES	FINLAND
& OTHER STORIES	SWEDEN

X

XENOS	THE NETHERLANDS
XL - BYGG	SWEDEN
XL-BYG	DENMARK
XL-BYGG	NORWAY
XXL SPORT	NORWAY
XXL SPORT	SWEDEN

Z

ZARA	THE NETHERLANDS

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BELGIUM

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THE NETHERLANDS

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