10th edition

ORI 2025

OMNICHANNEL RETAIL INDEX

The State of Digital Commerce & Omnichannel Retail

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SETTING THE STAGE

It's the 10th anniversary of the Omnichannel Retail Index ("the Index" or "ORI"). This annual study offers insights for retailers and brands to accelerate growth by taking the pulse of digital commerce and omnichannel retail. Launched in 2015, the Omnichannel Retail Index report expands this year for the first time to include new global markets.

The 2025 report outlines key findings on the state of omnichannel and digital best practices, offering insights on trends and customer demands. The Index quantifies how leading retailers and brands deliver on the omnichannel promise through mystery shopping conducted by OSF Digital's strategy consultants and team members across regions. This report also uncovers how retailers and brands meet ever-rising customer demands.

What You'll Learn

- *How brands and retailers are adopting key digital and omnichannel best practices*
- *Essential capabilities that drive a standout customer experience*
- *Where companies excel and where there's room to improve across the omnichannel journey*

Knowing the industry benchmark data and best practice adoption trends will help you prioritize your digital and omnichannel roadmap and ultimately make smarter investment decisions.

80%

of customers say the experience a company provides is as important as its products & services[1]

57%

of leaders with CX responsibility said CX contributed the most to organizational growth[2]

New Markets Included This Year

EUROPE & LATAM

How much will you spend?

Global omnichannel retailing market[3] (platforms & systems)

$7.8 B
spent in 2023

$19.5 B
projected for 2030

[1] Salesforce, State of the Connected Customer, 6th Edition, 2023

[2] Gartner, Gartner Customer Experience Survey, 2024

[3] Coherent Market Insights, Omnichannel Retailing Market, 2024

ABOUT THE OMNICHANNEL RETAIL INDEX 2025

Our Methodology

For the 2025 Index, OSF Digital's strategy consultants evaluated 116 retailers [4] across three regions: North America, and—new this year— Latin America and Europe. We narrowed our focus from 15 to 13 verticals, removing Discount and Pet.

Using detailed and extensive mystery shopping, we assessed the adoption of key omnichannel capabilities across the customer journey. Retailers and brands were measured against 150+ criteria spanning web, mobile, cross-channel, and in-store experiences. With the addition of two new regions, the criteria were held stable this year.

While the Index measures the adoption of features and functions, it does not reflect the implementation, how well a feature performs, or the value it delivers. For example, if both Retailer A and Retailer B offer product recommendations on the product detail pages (PDPs), they receive the same score—even if Retailer A's product recommendations are highly personalized and Retailer B leverages a basic product recommendation widget. Additionally, the criticality of best practices can vary by vertical. A virtual try-on feature may be essential in Apparel or Beauty but less relevant in Office/Electronics.

116
Brands & retailers

13
Retail verticals

150+
Criteria

[4] Out of the 116 companies in the study, 106 have physical stores. The other 10 companies were benchmarked only on online, mobile, and some cross-channel capabilities.

OMNICHANNEL RETAIL INDEX 2025

WEB

- Navigation & search
- Content & guided selling
- Category & list pages
- Product detail pages
- Cart & checkout
- Account & preferences
- Customer service
- Fulfillment & delivery

EXAMPLE

- Pop-up for loyalty or email signup
- Faceted navigation
- Contextual help live chat, FAQs

MOBILE

- Site-wide elements
- Mobile-optimized interactivity
- Store finder
- Customer service
- Typing on mobile

EXAMPLE

- Visual search/scan
- Transactional App
- Optimized zoom
- Keypad for numeric entry

STORE

- Loyalty
- Shopping tools
- Customer data collection
- Clienteling
- Experiential

EXAMPLE

- Loyalty signup
- Digital signage
- Endless aisle
- Past purchase lookup

CROSS-CHANNEL

- Inventory visibility
- Store pickup
- Returns
- Communication across channels

EXAMPLE

- BOPIS
- Combined cart
- Product lookup
- Order pickup ready communication

OMNICHANNEL

The criteria and findings show how well retailers and brands are meeting evolving customer demands. Businesses can use these insights to evaluate their current capabilities and shape their customer experience roadmaps. However, the adoption of best practices alone does not guarantee success. The execution of a feature matters, and broader factors—such as merchandise assortment, inventory availability, marketing, customer acquisition, and supply chain operations—also play a critical role in performance.

COMPANIES IN THE INDEX

ACCESSORIES / BAGS

Claire's
Coach
Hermes
Louis Vuitton
Sunglass Hut
Vera Bradley

APPAREL / FASHION

American Eagle
Anthropologie
Canada Goose
Carter's
Chanel
Children's Place
Dior
ETAM
Gap
Gucci
H&M
L.L. Bean
Lez a Lez
Shein
Lululemon
Madewell
Max Mara
Ralph Lauren
Renner
Torrid
Uniqlo
Sarenza
Zalando
Zara

ATHLETIC

Adidas
Decathlon
Dick's Sporting Goods
Nike
Patagonia
Puma
REI

BEAUTY / COSMETIC

Aroma-Zone
Bath & Body Works
NYX Professional Makeup
Natura
O Boticário
Sephora
Sephora.fr
Sephora.br
ULTA Beauty

BOOKS, HOBBIES, TOYS

Barnes & Noble
GameStop
Hobby Lobby
Lego
Michaels

CLUB

BJ's
Costco
Sam's Club

DEPARTMENT STORE

Bloomingdale's
Galeries Lafayette
Hema
JC Penney
Kohl's
Macy's
Nordstrom

FOOTWEAR

Cole Haan
Crocs
DSW
Famous Footwear
Foot Locker
Journeys
On Running

HOME / HOUSEWARES

Crate & Barrel
Design Within Reach
IKEA
Wayfair
West Elm
Williams-Sonoma

HOME IMPROVEMENT

Floor & Décor
Harbor Freight
Home Depot
Leroy Merlin
Lowe's
taQi
Telhanorte
Tractor Supply

JEWELRY

Bulgari
Cartier
David Yurman
Graff
Histoire d`Or
Kay Jewelers
Kendra Scott
Mejuri
Pandora
Swatch
Tiffany & Co
Van Cleef & Arpels

MASS MERCHANT / PHARMACY

Amazon
Casas Bahia
CVS
Droga Raia
Drogarias Araujo
Farmácias São João
Lojas Americanas
Magazine Luiza
Panvel
Target
Vitamin Shoppe
Walgreens
Walmart

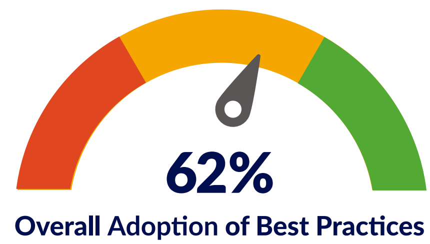
OFFICE / ELECTRONICS

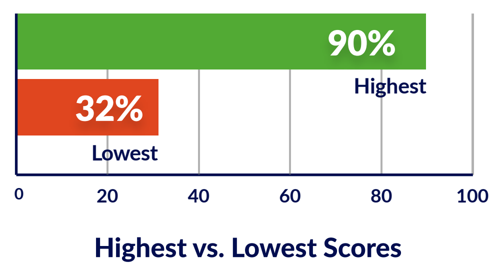
Apple
B&H
Best Buy
FNAC
Newegg
Office Depot
Staples

THE STATE OF OMNICHANNEL RETAIL

Overall 2025 Best Practices Adoption

The growing investment in omnichannel experiences is expected to reach 10.13 billion USD by next year and 25.35 billion USD by 2032.[5] Still, many retailers and brands continue to fall short of delivering the seamless, frictionless shopping journeys that consumers expect. The 2025 Index reveals both areas of progress and ongoing opportunities for improvement across regions and verticals. On average, brands and retailers have adopted only 62% of omnichannel best practices. The highest-performing company implemented 90% of best-practice capabilities, while the lowest adopted just 32%. This wide range indicates a considerable opportunity for growth, even among leading organizations.





While adoption of best practices varied by region, several criteria consistently showed ***strength across the assessed markets:***

Store Fulfillment Options:

88% offer Buy Online, Pick Up In-Store (BOPIS), with 77% ready for pickup within 3 hours—highlighting improved service-level execution.

Search Optimization:

77% of brands handle misspelled queries effectively, with growing use of personalized search suggestions.

Mobile App Adoption:

74% of retailers now offer transactional mobile apps, indicating mobile's significant role in the commerce ecosystem.

Loyalty Programs:

73% of companies offer a loyalty program, reflecting its continued strategic importance for retailers in retaining customers and increasing share of wallet.

[5] Coherent Market Insights, Omnichannel Retailing Market Analysis & Forecast: 2025-2032, 2024

Browse Path Enhancements:

Many best practices in this area are common across key pages, including product listing pages (PLPs)—for effective filtering—and product detail pages (PDPs)—for suggested/recommended products.

While the previous areas show growing maturity across the assessed regions, these represent ***untapped potential across the industry:***

"With rising costs and shifting customer loyalties, brands and retailers cannot afford to leave customer experience to chance. By strategically investing in the aspects they can control, forward-thinking organizations can not only weather uncertainty but also gain a decisive competitive edge."

Rich Siefert
Sr. Consultant,
OSF Digital

Personalization:

Retailers could broaden their use of personalization and give account-holding customers more control over their preferences and contact information.

Data Capture for Marketing:

Collecting mobile numbers, email addresses, and loyalty membership across channels could support targeted outreach and engagement.

Delivery Transparency:

Better communication of delivery timing in Cart & Checkout would build shopper confidence when making purchases.

Customer Support Access:

Broader availability and visibility of customer service touchpoints throughout the shopper journey would ensure shoppers get the answers they need to make a purchase.

Mobile App Differentiation:

Customers need stronger incentives and unique features to drive the installation and regular usage of the mobile app.

Quicker Access to Product Info:

Providing information sooner on the PLP with swatches and Quick Views will shorten the path to purchase.

Store Shopping Enhancements:

Online features like geolocation and filtering by in-store inventory will make it easier for customers to shop in their local stores.

While many brands are advancing in key areas like store fulfillment, search optimization, and loyalty, widespread gaps remain in personalization, customer service, and the mobile experience. For retailers aiming to meet rising customer expectations and stay competitive, closing these gaps is not just an opportunity; it's a necessity.

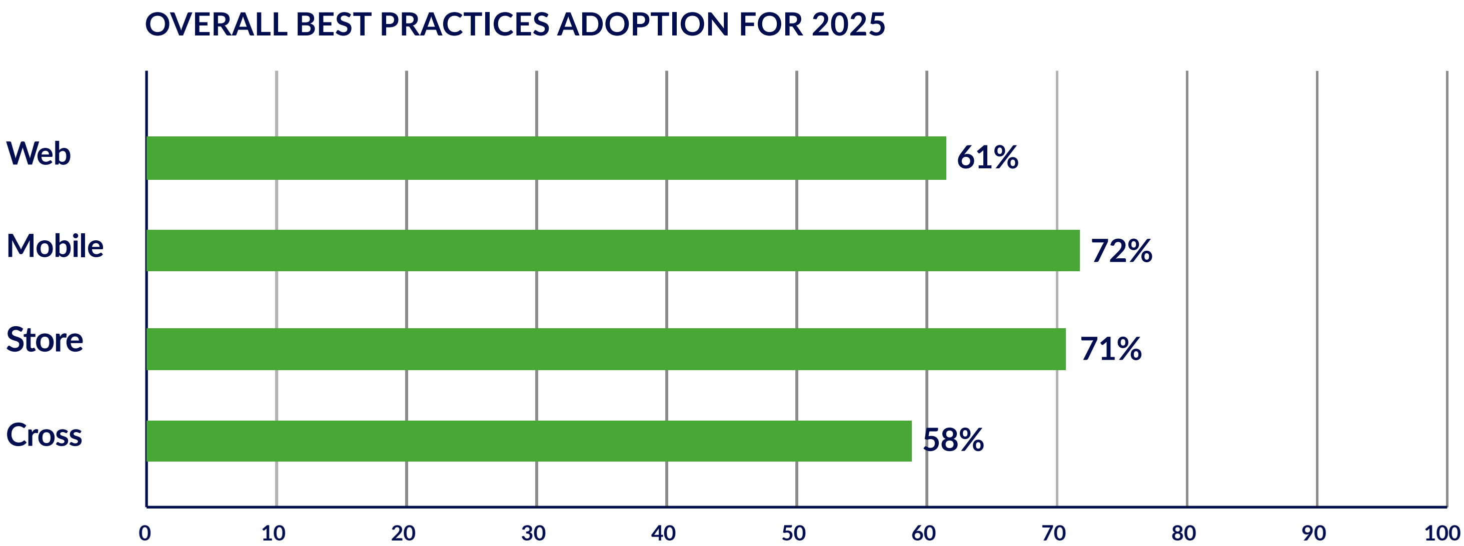
Generative AI, which offers promise to help in a number of these areas, particularly customer service and personalization, saw adoption of 22% across regions. With more than 1 in 5 brands and retailers already using Generative AI, Customer Service is the primary use case, but it also shows up in decision aids, review summaries and customization. While these powerful tools require data and strategic readiness, we expect to see adoption accelerate in response to rising customer expectations.

BEST PRACTICE ADOPTION BY CHANNEL

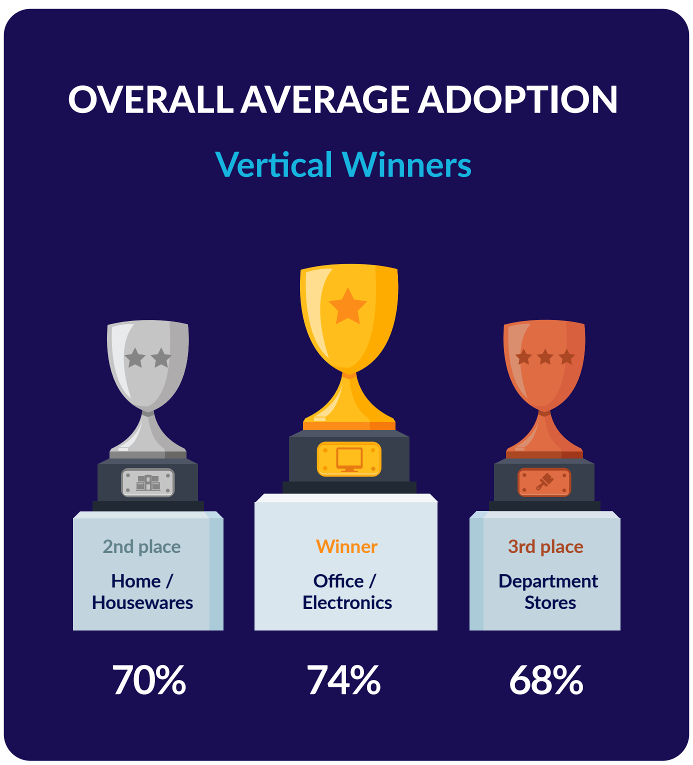
Across regions, the **mobile channel** led in best practice adoption, reflecting the retail industry's awareness that most consumers now shop from their mobile devices. Just one point behind, the **in-store channel** followed closely, underscoring the continued importance of physical stores in the omnichannel experience.

Online performance from the **online channel** varied more widely by region and retailer. However, several best practices still achieved strong global adoption, with all regions performing above average on select criteria.

Cross-channel execution and expectations differed by region, but North America stood out as a leader in this area, boosting the category with a 62% adoption rate. This region excelled in surfacing local store information—such as inventory availability and same-day pickup options—helping to bridge digital and physical experiences seamlessly.



ADOPTION RATES BY VERTICAL



Motivated by competitive pressures and customer expectations, the **Office/Electronics** vertical led in best practice adoption across the assessed regions, implementing nearly three-fourths of all criteria. This is likely driven by consumer electronics, which is the top global ecommerce product category, generating $922.5 billion in 2024.[6] Consumers, however, are strategic about their buying habits. Before making an electronics purchase, 85% of worldwide consumers visited at least two websites.[7] This gives Office/Electronics retailers greater incentive to deliver experiences that will outperform their competitors. It should also be noted that Office/Electronics brands typically had an early digital head start compared to other verticals like Grocery and Luxury.

[6] Statista, Statista Market Insights, 2024

[7] Statista, Shoppers browsing online before buying electronics 2024, by country, 2024

Next in the race came **Home/Housewares**—a vertical seeing new growth as more consumers prefer to entertain and celebrate milestone events at home.[8] With more time spent at home, especially since the COVID-19 pandemic, demand for home decor that enhances living spaces has surged. Retailers in the space are responding to this demand, recognizing that omnichannel capabilities directly impact sales in this emotion- and design-driven category. To stay competitive, traditional players are upgrading their omnichannel offerings to keep pace with digitally savvy challengers that provide next-day delivery, free standard delivery, and curated digital experiences, including allowing shoppers to visualize how a product will look in their homes.

Closely following in third place was the **Department Stores** vertical. Growth in this category was fueled by technology advancements and new retail strategies.[9] Challenges such as competition from online-only retailers and changing consumer behaviors have spurred innovative responses from department stores to adopt omnichannel best practices, with the highest adoption of Cross-Channel best practices at 83%.

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62% of customers say their experiences with one industry influence their expectations of others[10]

STATE OF OMNICHANNEL RETAIL HIGHLIGHTS

The Online Experience: Hits and Misses

As consumer expectations for seamless, intuitive digital experiences continue to rise, brands and retailers are under increasing pressure to deliver. In fact, 74% of consumers expect to be able to do anything online that they can do in person or by phone.[11]

[8] HomePage News At-Home Entertaining Report, 2024

[9] Market Research Future, Department Store Market Research Report, 2025

[10] Salesforce, State of the Connected Customer, 3rd Edition, 2020

[11] Salesforce, State of the Connected Customer, 6th Edition, 2023

Despite noticeable variation across regions and industries, there are several areas where global adoption of omnichannel best practices is consistently robust and above average. We will explore the most widely adopted capabilities in three critical parts of the customer journey: loyalty programs, search, and key product pages.

Top-performing **loyalty programs** can boost revenue from customers who redeem points by 15 to 25% annually by increasing purchase frequency, basket size, or both.[12] And 79% of consumers are more likely to do business with a brand because of its loyalty program.[13] Our Index supports these figures, showing that loyalty programs remain a cornerstone of customer retention and spending strategies, with 73% of retailers and brands offering a loyalty program.

3 Most Common Loyalty Program Features:

Programs that consistently provide benefits (access to pre-sales, early releases, exclusive offers):

98%
ADOPTION

For those with earn-and-burn, points-based programs, the ability to redeem points for a discount:

93%
ADOPTION

Ability to track loyalty status, points or progress in customer account:

85%
ADOPTION

Site search is a critical function in digital commerce that drives conversions, with 43% of site visitors going directly to the internal search bar upon arrival.[14] Searchers are 2 to 4 times more likely to convert than non-searchers.[15] These metrics highlight the business impact of investing in high-performing search. Brands are taking note, as they have intensified their focus on optimizing their search capabilities.

83%
provide suggestions and alternative results when no matches are found

77%
automatically return results for the correct word when a misspelled term is input

70%
maintain a persistent search bar visible or quickly accessible when scrolling

[12] McKinsey & Company, "Next in loyalty: Eight levers to turn customers into fans", 2021

[13] Merkle, Loyalty Barometer Report, 2022

[14] Forrester, Must-Have E-Commerce Features, 2022

[15] Cover, "How Faceted Search Improves Customer Experience [+Best Practices Guide]", 2024

Product listing pages (PLP) and product detail pages (PDP) are key parts of the shopping funnel that can ease the journey and drive conversion rates. When executed well, they can help customers find what they want, reduce cart abandonment, and influence buying decisions.

Most Popular PLP Features:

97%
enable shoppers to sort results (by Best Sellers, Price, New, etc.)

96%
allow shoppers to refine browse and search results by attributes using filters

85%
leverage featured filters (links or images) at the top of the PLP for quick access to top choices

Most Popular PDP Features:

97%
display images of recommended products (e.g., "You May Also Like")

91%
allow shoppers to add an item to a wish list

81%
provide the option to write and/or read a review

While there was wide variance across retailers and regions for most criteria, key criteria showed below-average adoption for all regions. Some features may be more common for some verticals than others, but many of these underleveraged capabilities represent opportunities to broadly improve the customer experience.

Least Popular PLP Features:

35% *enable Quick View that moves product info and decision-making up to the PLP*

17% *allow shoppers to compare multiple products*

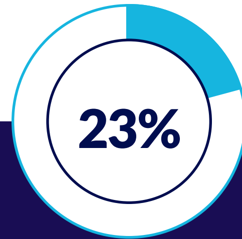
Least Popular PDP Features:

31% *provide an expected delivery date*

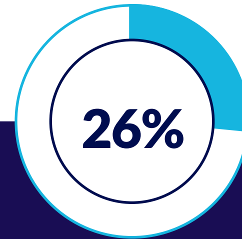
34% *provide the shipping cost (even with 80% of LATAM brands doing so)*

Opportunities for Growth in the Online Channel

For companies that want to grow and lead, **personalization** has become table stakes. With personalization being a goal for many retailers and brands—and an expectation for many consumers—there are still some missed opportunities in this area. Delivering personalized experiences is especially important when 71% of consumers expect personalization, and



allow account holders to select how often they want to be contacted and/ or what type of emails



update category landing pages with products previously browsed

76% get frustrated when they don't find it.[16] To successfully deliver best-in-class personalization, brands and retailers need well-developed strategies across channels and across the journey, robust customer data, and powerful personalization tools that can take time to build out.

Another area where organizations have room to grow is in **customer service**. This has become a significant part of the shopping journey that can cultivate loyalty or trigger a customer to switch brands. Overall, widespread adoption of best practices in customer service has a long way to go. But we noticed a few major weak spots.

33%
enable visitors to shop live with a specialist

41%
offer live chat to every page in the shopping funnel

53%
offer customer service contact details in checkout

"Customers demand seamless personalization and immediate, high-quality support at every touchpoint. Retailers and brands that consistently exceed these expectations—leveraging advanced data, analytics, and cutting-edge technology—will not only command deeper customer loyalty but also drive strong sales growth and expand market share. "

Scott Forrest, Sr. Director of Digital Strategy, OSF Digital

[16] McKinsey & Company, McKinsey Next in Personalization consumer survey, 2021

Despite regional differences, these findings in the online shopping channel underscore a global convergence towards optimizing loyalty programs, search, and PLP and PDPs. Organizations that deliver seamless search experiences, showcase strong loyalty benefits, and enable intuitive product discovery are better positioned to improve satisfaction, increase conversions, and develop a long-term competitive advantage.

Cross-Channel: Omnichannel Execution Varies Widely

While omnichannel expectations and execution vary across regions and retailers, North America emerged as a leader in implementing cross-channel best practices. Retailers in this region have adopted an average of 62% of key omnichannel features—indicating a strong commitment to creating seamless shopping experiences across digital and physical touchpoints.

An omnichannel strategy serves not only customers, but retailers as well. Omnichannel shoppers spend 30% more than those who shop using only one channel,[17] and companies with omnichannel strategies[18] retain 89% of their customers compared to 33% for companies with weak omnichannel strategies. Omnichannel strategies also enable better use of scarce inventory, which can lead to improved margins. While many retailers have made significant strides in core omnichannel capabilities, lower adoption of more advanced or integrated features suggests that there is still substantial room for

Most Adopted Cross-Channel Features:

88%
offer BOPIS/pick up in store

78%
feature a store locator in the top navigation

77%
fulfill BOPIS orders within 3 hours of purchase

Least Adopted Cross-Channel Features:

36%
use geolocation to indicate the nearest store

43%
allow shoppers to combine BOPIS and ship-to-home items in the cart

48%
allow shoppers to refine their selection on the PLP to what is in their local store

[17] Invesp, "The State of Omnichannel Shopping—Statistics and Trends," 2025

[18] Invesp, "The State of Omnichannel Shopping—Statistics and Trends," 2025

This overall performance reveals a significant disparity between the most and least adopted features, highlighting opportunities for retailers to expand their capabilities and drive more cohesive and lower-friction customer journeys. Bridging this gap will be key to meeting consumer expectations and unlocking higher customer retention and spending across channels.

Mobile: A Strategic Imperative

As **mobile** traffic continues to dominate digital engagement, optimizing the mobile shopping experience has become a strategic imperative for brands and retailers. Nearly 80% of all digital commerce traffic worldwide now originates from mobile devices[19]—a clear signal that the mobile channel is no longer a secondary touchpoint but a primary avenue for consumer interaction.

Europe led in the adoption of mobile best practices, with 78% average adoption of mobile best practices for the retailers evaluated. European retailers demonstrated the highest levels of design and functionality adaptation for mobile-specific constraints, including small screen sizes, limited keyboard interactions, and touch-based navigation.

While mobile conversion has historically trailed behind desktop, mobile experiences that take advantage of device capabilities and recognize form factor limitations can positively impact mobile conversion. And, with mobile traffic expected to continue to increase, closing the conversion gap should be a top priority for nearly all brands and retailers. While many have turned to mobile apps to provide efficient mobile shopping, few (27%) have developed clear app benefits that can lead to increased downloads and, critically, ongoing usage.

Most Adopted Mobile Features:

85%
offer zoom for product images

74%
present a numeric keyboard by default for numeral-only fields

74%
offer a transactional mobile app

[19] Statista, Distribution of retail website visits and orders worldwide in 1st quarter 2025, by device, 2025

Least Adopted Mobile Features:

5%
include customer service elements in the header

20%
enable image-based search

27%
offer features exclusive to the mobile app

Mobile shopping doesn't just influence online conversions. It also plays a critical role in shaping in-store behavior, with 71% of in-store shoppers using smartphones for research indicating their device has become more important to their in-store experience.[20] From scanning barcodes to checking inventory or reading reviews, mobile-enabled experiences are now integral to the omnichannel path to purchase.

Stores: Still a Vital Place to Shop

Despite the rapid rise of digital commerce, physical stores remain a critical component of the omnichannel journey. More than 80% of retail sales still take place in a physical location,[21] showing the channel's significance in the retail ecosystem. Leading retailers and brands view stores not only as points of sale but also as a powerful source of customer data, which can be used to enrich the customer experience across all channels.

Europe and North America tied at 75% for overall adoption of store best practices. Both regions showed strong efforts to capture customer information in stores, with loyalty sign-ups in-store gaining increasing prominence.

Top Adopted Store Features:

89%
enable store associates to order items not in-store from another store or online

88%
allow shoppers to sign up for a loyalty program in-store

77%
fulfill BOPIS orders within 3 hours

[20] Invesp, "The State of Omnichannel Shopping—Statistics and Trends," 2025

[21] McKinsey & Company, "What is omnichannel marketing?", 2022

Lowest Adopted Store Features:

53%
asked customers for their mobile phone number at checkout for SMS

37%
offer experiences in-store

16%
enable associates to check customers out via a mobile device

As omnichannel expectations evolve, retailers must continue to invest in physical locations—not only to drive sales, but to enhance fulfillment, capture customer data, and deliver seamless cross-channel experiences. Those who succeed will blend the best of physical and digital to meet consumers wherever they choose to shop.

CONCLUSION

The 2025 Omnichannel Retail Index highlights clear progress in adopting best practices across regions, channels, and verticals, but it also reveals a landscape marked by uneven execution and untapped opportunities. While brands and retailers have made notable strides in areas like loyalty programs, site search, and mobile app adoption, the overall average of 62% best practice implementation underscores the substantial room for growth, often in fundamental capabilities. High-performing retailers are setting the pace, but a significant gap remains between leaders and laggards, especially in personalization, customer support, and mobile innovation.

To remain competitive and meet rising consumer expectations, organizations must continue to strengthen their omnichannel strategies—not only in each individual channel, but through truly integrated, cross-channel experiences. Investing in advanced features like mobile-native tools, cross-channel inventory visibility, and customer data capture will be essential. But to truly lead, organizations must close the gaps—embracing more sophisticated personalization, refining mobile capabilities, and ensuring frictionless transitions between channels. As the retail landscape becomes increasingly interconnected, those who successfully bridge the physical and digital divide will be best positioned to drive engagement, loyalty, and long-term growth.

OMNICHANNEL
RETAIL INDEX
2025

COMING SOON!

More Omnichannel Retail Index Reports

We'll reveal regional trends and spotlight some of the most significant shopping features and offerings worldwide.

Regional Reports

Get a closer look at omnichannel best practice adoption in these markets, with detailed breakdowns of high-adoption criteria and opportunities for growth.

EU EUROPE
LATAM LATIN AMERICA
NA NORTH AMERICA

Feature Spotlights

Dive deeper into specific areas of omnichannel shopping with global benchmarks across core capabilities.

- **Customer Experience & Personalization**
- **Ecommerce & Online Shopping**
- **Marketing & Loyalty**
- **Customer Support & Service**
- **Compliance & Social Responsibility**
- **In-Store Experience**

About OSF Digital

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