

HOW EXPERIENCE, DATA, AND DIGITAL INTEGRATION REDEFINE PHYSICAL RETAIL

Insights from the Omnichannel
Retail Index





Executive Summary

The 2025 Omnichannel Retail Index (ORI) reveals a decisive evolution in the role of physical stores. No longer just sales points or showrooms, stores have become dynamic engagement hubs—spaces where digital intelligence meets human connection. Across regions, store best-practice adoption reached 75%, up from 63% in 2024, marking one of the strongest year-over-year gains in the Index. The growth is driven by **loyalty integration, data collection, and the rise of digital-assisted associates**, signaling a future where in-store and online are no longer distinct, but continuous.

In the connected retail ecosystem, the store is not the endpoint of the journey—it's the heartbeat of it.

75% store best-practice
adoption

The Human-Digital Hybrid

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Shoppers may browse online and compare on mobile, but they still crave the tactile assurance and personal connection that only stores can offer. Retailers are responding with experiences that merge human warmth and data-driven precision.

The new store experience doesn't replace associates with technology—it equips them. Mobile tools turn associates into connected advisors, bridging customer intent across digital and physical touchpoints.

Retailers leading this shift are redesigning the store floor as a data-rich environment—where every interaction adds context, and every purchase fuels a feedback loop that enhances personalization across channels.



88% up from 71% in 2024

of brands with loyalty programs now enable in-store sign-up

56% up from 34% in 2025

of store associates use tablets for inventory lookup, clienteling, and product information

Global Findings

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STRENGTHS

- ✔ **Omnichannel Integration**
89% of retailers now offer BOPIS (Buy Online, Pick Up In Store), and 56% fulfill online orders from retail stores as well as distribution centers.
- ✔ **Speed and Convenience**
74% confirm pickup readiness within three hours, showing continued investment in fulfillment precision.
- ✔ **Data Collection and Loyalty**
68% of brands ask for email addresses and 62% for mobile numbers during checkout, creating valuable connections for loyalty follow-up.
- ✔ **Digital Empowerment**
Store technology adoption reached 56%, transforming associates into active participants in omnichannel journeys.

WEAKNESSES

- Fragmented Inventory Visibility**
Only 8% of EU retailers allow filtering by in-store availability at the product-listing level.
- Limited Mobile Checkout**
Just 19% of retailers enable mobile POS transactions, a missed opportunity for speed and customer freedom.
- Disjointed Data Use**
While collection is high, integration across marketing, service, and ecommerce systems remains inconsistent—limiting the personalization potential of in-store insights.



Regional Snapshot

North America: The Connected Frontline

North American retailers saw a 12-point increase in in-store best-practice adoption, driven by a surge in digital tool usage. 56% of associates now use tablets for real-time product lookup and customer service, while 89% offer BOPIS, confirming pickup orders within hours.

However, only 19% have enabled true mobile checkout.

The next opportunity lies in bridging mobility and data—creating unified experiences where associates not only facilitate transactions but anticipate needs using CRM insights and AI recommendations.



Europe: Loyalty As The Bridge

European retailers lead in store sign-up and loyalty enrolment, with 92% enabling in-store registration and 55% incentivizing it. However, personalization and inventory transparency remain limited.

For Europe, the future of the connected store lies in turning its operational precision into emotional intelligence—using the same rigor applied to logistics to craft more adaptive, empathetic customer journeys.



Latin America: Trust At The Core

Latin-American brands continue to excel in reliability and transparency, with 83% offering store pickup and 74% of orders ready in under three hours. What differentiates this region is the human tone of retail—service-oriented and locally attuned.

The opportunity now is to pair that emotional connection with digital insight—embedding AI-driven guided selling, loyalty analytics, and predictive stocking to deepen engagement and efficiency.



Feature Deep Dives:

BOPIS and BORIS: The Experience Bridge

“Buy Online, Pick Up In Store” has become the universal connector between convenience and connection. **89% of retailers now offer BOPIS**, and **84% indicate product availability online**, yet execution remains uneven. Best-in-class retailers treat pickup as an experience moment, not a logistical step—designating clear pickup areas (44%) and communicating readiness via SMS (55%).

The next leap will come from integrating real-time inventory and predictive logistics, so customers know exactly when and where to expect their orders—without friction or uncertainty.



Feature Deep Dives:

Associates as Experience Architects

The store associate has become the face of data activation.

- **56% use digital tools** like tablets for product lookup and personalization.
- **68% collect emails** and **62% gather SMS consent**, feeding marketing and loyalty ecosystems.

These data loops transform one-off transactions into enduring relationships. The key is not just gathering information—it's using it to create fluid, context-aware experiences that feel genuinely personal.

Designing the Digitally Enabled Store

The best physical stores in 2025 are designed for flow—seamlessly integrating fulfilment, discovery, and engagement.

- Signage and digital wayfinding guide BOPIS pickup (**42% adoption**).
- In-store kiosks and **endless aisle experiences** enable self-service and inventory lookup.
- **AI-driven guided selling** and recommendation tools are beginning to bridge physical browsing with digital depth.

Retailers that blend digital infrastructure with human warmth create spaces that are both efficient and emotionally resonant—where every interaction feels natural, informed, and connected.



Emerging Trends

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MOBILE EMPOWERMENT

Growing use of associate devices for checkout, guided selling, and CRM access—though still underutilized at 19%.

REAL-TIME INVENTORY TRANSPARENCY

Increasing investment in unified data systems to power live stock visibility and hybrid fulfillment.

DATA-DRIVEN LOYALTY

Associates are the new data gatherers—linking in-store behavior to digital personalization.

PREDICTIVE FULFILLMENT

Rising use of AI to forecast pickup readiness and anticipate in-store traffic.

EXPERIENCE DESIGN THINKING

Store layouts evolving to integrate community spaces, digital screens, and hybrid service zones.

Lessons for Retailers

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REIMAGINE THE STORE AS A DATA ENGINE

Every in-store interaction should feed insight into marketing, loyalty, and personalization systems.



EQUIP, DON'T REPLACE, ASSOCIATES

Digital tools amplify human service—train staff to use data as a trust-builder.



CONNECT THE JOURNEY

Integrate store, app, and ecommerce systems to ensure consistency from discovery to pickup.



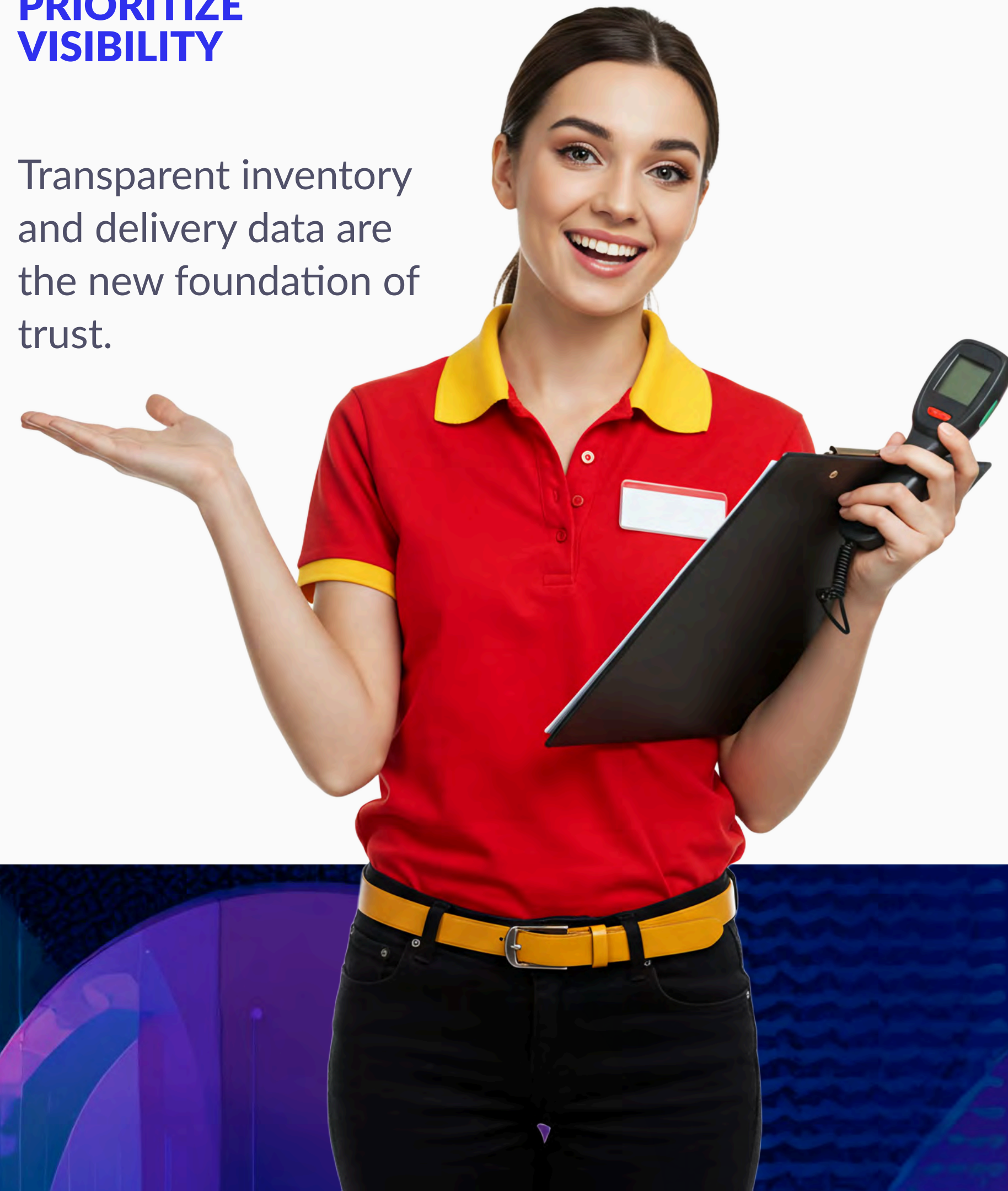
PRIORITIZE VISIBILITY

Transparent inventory and delivery data are the new foundation of trust.



TURN LOYALTY INTO DIALOGUE

Use in-store enrollment moments to start relationships that extend across every channel.



Conclusion

The physical store has re-emerged—not as retail's past, but as its most vital, evolving frontier.

The 2025 Omnichannel Retail Index shows that the most successful retailers are not separating digital and physical—they're fusing them. By blending experience, data, and digital integration, the store becomes more than a transaction—it becomes a living ecosystem of connection, trust, and relevance.

In the connected era, the store isn't where the journey ends—it's where it begins again.



Available Now: → [Omnichannel Retail Index 2025 Reports](#)

→ [Explore](#) the latest insights from the 10th edition of the Omnichannel Retail Index, featuring regional deep dives and focused spotlights on the capabilities that define world-class retail performance.

Regional Reports

→ [Get a closer look](#) at omnichannel best practice adoption across key markets, with detailed benchmarks and opportunities for growth:

- Europe
- Latin America
- North America

Feature Spotlights

→ [Dive deeper](#) into the areas shaping the future of omnichannel commerce, with global benchmarks across core capabilities like customer support and service, compliance and social responsibility and more.

Do you want to go further?

→ [Contact](#) OSF's Advisory team to identify your best use cases, roadmap, and success metrics.

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With regional hubs across North America, LATAM, EMEA, and APAC, OSF combines global reach with personal, high-touch delivery.

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