

Back to basics:

What European shoppers really want from the store experience



Exec Summary

Shoppers across Europe continue to rely heavily on physical stores, and the fundamentals of the store experience remain the primary drivers of in-store satisfaction. To understand how consumers across the region shop, what they value from the in-store experience, and whether customer service is getting better or worse, Insider Trends and Fern Insights surveyed 1,005 consumers across the UK, France, Germany, and the Netherlands in November 2025.

We found that shoppers split their purchases almost evenly between online and in-store, choose physical retail for tactile evaluation and certainty, and most often describe customer service today as “average.”

Three findings matter most for retailers:

- 1. Physical beats online for purchase certainty and socialising**
Customers value getting hands-on with products to make correct buying decisions; many shop as an extension of socialising.
- 2. Store fundamentals drive experience**
Stock availability, clean environments, clear layout, and staff presence consistently top the list of what contributes to a positive store visit.
- 3. Staff interactions define memorable experiences**
Associates are the most common reason shoppers cite for both exceptional and poor experiences.

Product evaluation and social activities drive store visits

We all know that European consumers aren't only shopping in stores these days.

E-commerce penetration across Northern and Western Europe is among the highest in the world. Countries in these regions took seven of the top 10 slots for the number of internet users who also shop online in the United Nations Conference on Trade and Development (UNCTAD) Digital Economy Report 2024.

Taking grocery shopping out of the equation – which tends to still be more store-based – our research into shopping behaviours in the UK, France, Germany, and the Netherlands found that European shoppers fairly evenly split their shopping between the store (58%) and online (42%).

What is also interesting is that these shoppers aren't 'showrooming' – visiting a store and then buying the same product online – as much as you might expect.

How often do you buy in-store versus online?



Only 2% of respondents say that they always do this, while 34% say that they sometimes buy online after visiting a store. 43% say that they rarely go to a store and then buy online later, and 21% say they never do this.

However, this behaviour makes more sense when you consider the main reasons why European consumers say they shop in-store rather than online:

48% say they prefer to view/feel products before they buy

30% say they enjoy shopping

39% say they want to know exactly what they are getting

29% say that sometimes they just see something they like (spontaneous purchases)

24% say that they can do other things while shopping in-store e.g. shop for other items, return items, eat out, meet with friends by shopping in-store

The main reasons European consumers say they shop in-store rather than online

Respondents could choose up to five answers

These are all journeys and needs that are better served by the store than online. They also point to the role of shopping in-store as a social activity, as well as a way of discovering new products and verifying purchases are suitable before they buy.

A lot of these shopper behaviours are a direct result of the rise of online shopping. E-commerce presents almost endless choice in every product category, with new brands popping up every single day.

With so much competition, both retailers and consumers can struggle with visibility – brands may be buried in the volume of results and algorithms, and consumers may find it hard to discover the right products for them among the overwhelming number of options.

















Shoppers can also struggle to know what they are getting when buying online. Product descriptions can be lacking, photos and videos don't always bridge the gap between what you see and what you get, and reviews can be biased.

And as much as possible, shoppers want to avoid having to return unsuitable products, which not only takes time and ties up their money, but also leaves them without the item they wanted. Returns are also an operational and financial pain for retailers.

It's no surprise then that customers are turning to the store – with its curated selection of a limited number of items – to find and evaluate products, and why brands are desperate to be stocked on highly visible shelves.



What defines a positive memorable experience?

Discovery opportunities	Great service	Personal touch	Expert advice
<p>"I always find something to buy that I hadn't planned on, and there's always good advice available when I need help."</p> <p> Germany</p>	<p>"The staff were very friendly and helpful with any questions; they would even get the product or check if it was available, and also inquire in other branches."</p> <p> Germany</p>	<p>"Always a personal approach."</p> <p> Netherlands</p>	<p>"The advice of the salespeople, their kindness, and their patience."</p> <p> France</p>
<p>"Being warmly welcomed, being able to touch, try on, and combine several items. Being able to buy, try again at home, and return what doesn't suit me."</p> <p> France</p>	<p>"Good service and really thinking along with the customer!"</p> <p> Netherlands</p>	<p>"The shop assistant personally recommended books she'd thought I'd like based on what I'd read before. I left the bookstore with two books she'd recommended, and I'd ended up loving them both. That was an amazing experience."</p> <p> UK</p>	<p>"The advice from the salesperson, who was professional and knew their product well, was appreciated."</p> <p> France</p>
<p>"The staff being visible and available if needed. The fact you can actually see the products in real life and you get a better feel for the product. You know exactly what you're getting."</p> <p> UK</p>	<p>"The staff confirmed the availability, looked for the product for me, and answered my questions regarding the product."</p> <p> UK</p>	<p>"The last amazing in-store experience I had was memorable because the staff were genuinely friendly and knowledgeable, making me feel valued."</p> <p> UK</p>	<p>"When you receive honest advice and are surprised by a product or selection."</p> <p> Germany</p>
<p>"It's pleasant because you can stroll between the aisles to see what items they have on offer and whether they're on sale or not."</p> <p> France</p>	<p>"The staff were genuinely helpful, the store layout was easy to navigate, and they went the extra mile to make sure I found exactly what I needed."</p> <p> UK</p>	<p>"Very pleasant advice until I found something suitable; plenty of time and attention was given to me."</p> <p> Germany</p>	<p>"Staff very helpful in finding what I wanted and offering alternatives in case not in stock."</p> <p> UK</p>



Retail fundamentals are most critical to in-store experience

They may have their reasons for choosing to visit stores, but are physical retailers living up to the expectations of Europe's shoppers? When asked about the things that contribute most to a positive shopping experience in-store, European shoppers highlight the fundamentals as being most critical:

41% say **good stock availability** is important

26% say availability of **changing rooms**

38% say they want the store to be kept **clean and tidy**

25% say the **in-store layout**

31% say they want to **feel welcome/comfortable**

23% say there should be a **good number of staff** in-store/behind tills

The fundamentals that European shoppers highlight as contributing most to a positive shopping experience



Respondents could choose up to five answers

These are all areas that could be considered Retail 101 which suggests a disconnect between what customers experience and the store environment and service that retailers think they offer.

Our research also asked European shoppers about their typical activities before they shop in-store, which highlights more quick win opportunities for retailers.

These behaviours show the need for retailers and brands to invest in omnichannel capabilities if they haven't already. Being able to track real-time stock levels in stores and share that information with consumers online can drive visits and sales, as well as improve the customer experience.

Shoppers are also coming to the store well-armed with information about prices, sales, and the products on offer, which means that store associates need to have access to the same levels of information at a minimum.

Strategies like online-only pricing and deals could potentially damage in-store sales – and full or higher-price sales – because consumers won't make purchases if they know the retailer is offering a lower price elsewhere.

83% say they typically do at least one online activity before visiting a store.

30% say they check **opening times** of stores online before they visit

27% say they **set a budget** before they go in-store

26% of shoppers **check what sales are on** online before they go to the store

23% say they check **store locations** before a store visit

18% say they **browse a retailer's website for inspiration** before they shop in-store

18% say they **check whether items are in stock** online before going to the store

What shoppers do before they visit a store



Respondents could select all that apply

Nearly 30% of European shoppers say service is slipping

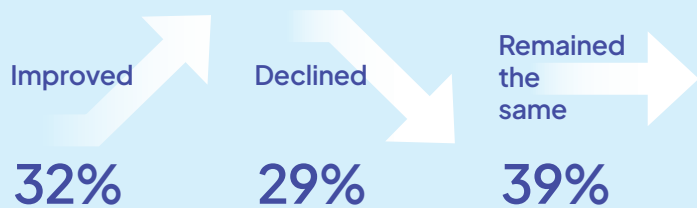
Shoppers across Europe have mixed feelings about the level of customer service that they receive in stores.

When asked if the level of service in stores has improved or declined over the past two years, there is a fairly even split between those who feel it has improved (32%), and those who feel it has declined (29%). The remainder feel it has stayed the same (39%).

The picture becomes more interesting when we look at how shoppers rate the level of customer service offered by stores – with 1 being terrible and 5 being amazing. So, even though 29% of shoppers in Europe feel that customer service in stores has declined in recent years, few think it is terrible or below average overall.

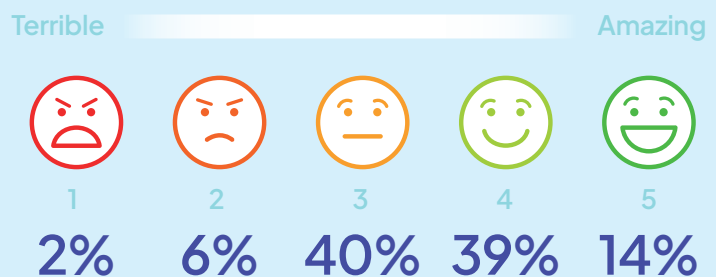
This does suggest that stores that were once considered to have amazing or above average customer service may have slipped to just being average and could be at risk of falling further in the eyes of the shopper without improvements being made.

Has the level of service in store improved or declined over the past two years?



Response to "In your opinion, has the level of service in stores improved or declined over the past two years?"

How would you rate the level of customer service stores offer today?



Response to "On a scale of 1 being terrible and 5 being amazing, how would you rate the level of customer service stores offer today?"
Percentage may not total due to rounding.

Investing in shopper priorities – in making sure that everything that customers notice and care about when shopping in store is as good as it can be – will put most retailers head-and-shoulders above the competition.



Percentages may not total due to rounding

Staff make or break the store experience

When asked about their last amazing store experience, it is telling that in all markets many European shoppers say they have never had or can't remember such an experience. Of those who did say they've had an amazing store experience, the most common reason for it being so memorable is the staff and level of customer service they provide.

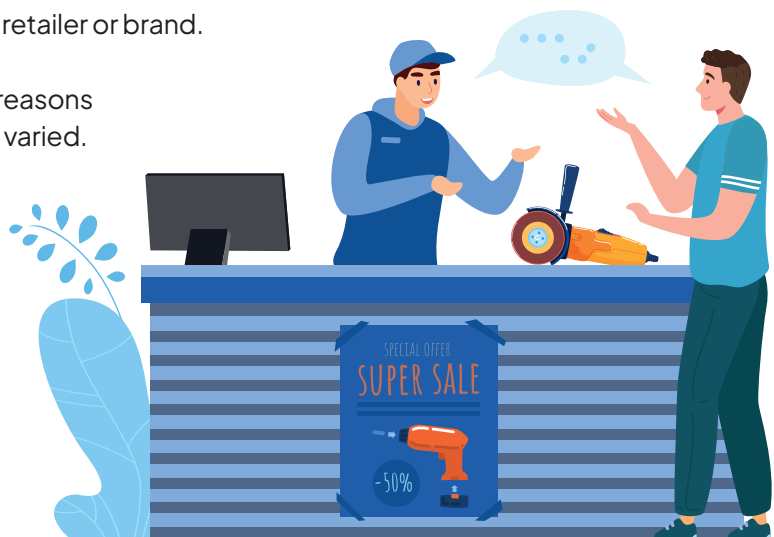
This highlights the importance of investing in the right people and giving them access to tools that make it easier for them to offer great service, such as live stock checking, mobile checkout technology, and product information. Product availability, pricing, and the store environment are also mentioned as contributing to an amazing store experience.

Positively, when asked about their last terrible store experience, many shoppers in all four markets also say they can't remember an example. However, several shoppers say they have never returned to a particular shop after a bad experience, which highlights the 'stickiness' of negative experiences and their ability to colour a customer's perception of a retailer or brand.

Unlike with an amazing store experience, the reasons for a terrible store experience are much more varied.

Long queues to pay is a common theme in all markets, as is the presentation of the store and whether it is clean or cluttered.

Once again, staff have a big influence over the quality of the in-store shopping experience, with many shoppers citing rude, unfriendly, and unresponsive staff as making for a poor experience.



Customer service training is clearly a vital part of creating a positive store experience, but staff may also not be providing optimal customer service because they don't have the necessary tools or are under pressure through having too many different responsibilities.

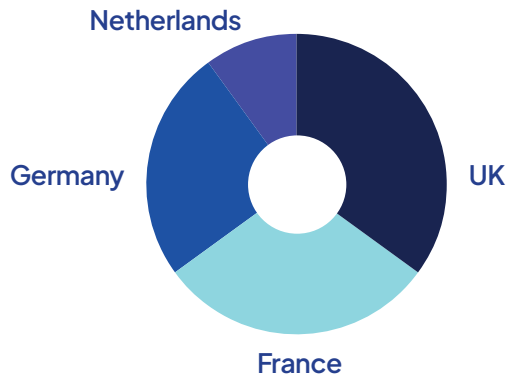
For example, mobile payment systems mean that staff can spend time helping customers and then complete the purchase wherever they are in the store for a more seamless experience that doesn't force the customer to join a long queue.

What defines a positive memorable experience?

Lack of stock	Long queues	Rude or unavailable staff	Untidy store
<p>"Lack of available products and sizes."</p> <p> France</p>	<p>"The excessively long waiting time and the lack of friendliness and professionalism on the part of the staff."</p> <p> France</p>	<p>"The saleswomen were chatting amongst themselves and completely ignored us as customers, even though we were the only customers. Our request for service was also completely ignored until we left the store."</p> <p> Germany</p>	<p>"Lots of clutter, very busy, sloppily presented."</p> <p> Netherlands</p>
<p>"The effort of setting out on the journey when items are not available."</p> <p> Germany</p>	<p>"Long queue at the checkout. Rude and bad-tempered cashier."</p> <p> Germany</p>	<p>"I hate standing in front of the counter and being ignored by the member of staff standing right in front of me."</p> <p> UK</p>	<p>"Unavailable sales staff, unwelcoming store, poorly organised."</p> <p> France</p>
<p>"When it said they had stock and it wasn't in stock at the store; the nearest one was 22 miles away."</p> <p> UK</p>	<p>"A very long queue at the cash register."</p> <p> Netherlands</p>	<p>"The employee rolled their eyes at me when I asked if she could check for stock."</p> <p> UK</p>	<p>"Unfriendly staff, the store was dirty, it smelled unpleasant, and some of the clothing on display was defective."</p> <p> Germany</p>
<p>"The checkout line was slow, the store was cluttered, and several items were either out of stock or misplaced."</p> <p> UK</p>	<p>"Long queues at the checkout and also at the information points."</p> <p> Germany</p>	<p>"People behind the counter who don't even say hello or are downright rude."</p> <p> Netherlands</p>	<p>"Clothes all over the floor, couldn't find anything or didn't want to because it was a mess."</p> <p> UK</p>
<p>"That they really had almost nothing left on the shelves."</p> <p> Netherlands</p>	<p>"Too many people at the checkout and too long a wait."</p> <p> France</p>	<p>"It was impossible to find a salesperson or get any information about the product; I left without buying anything."</p> <p> France</p>	<p>"A very messy and unkempt store."</p> <p> Germany</p>
<p>"Very messy and many things were missing."</p> <p> Germany</p>	<p>"Getting to the tills and finding 1 out of 8 tills open and long queues."</p> <p> UK</p>	<p>"I was looking for something and couldn't find it. There wasn't a salesperson in sight."</p> <p> Germany</p>	<p>"The store was a mess the clothes were all over the place and I had to search all over for the correct size."</p> <p> UK</p>

Survey Methodology

Insider Trends and Fern Insights conducted an online survey in November 2025 and received responses from 1,005 consumers across the UK, France, Germany, and the Netherlands.

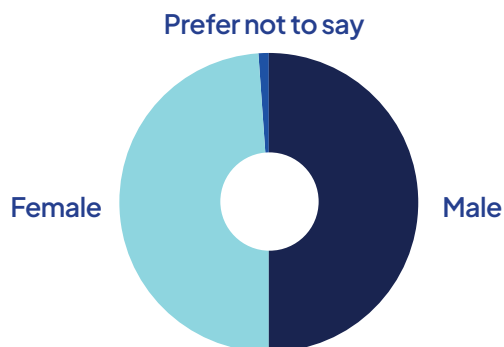
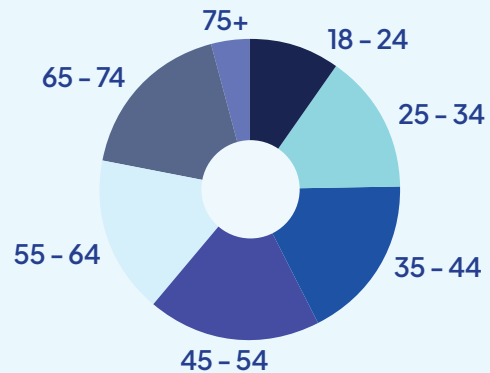


Geographic presence of respondents

- UK: 35%
- France: 30%
- Germany: 25%
- The Netherlands: 10%

Age of respondents

- 18 - 24: 10%
- 25 - 34: 15%
- 35 - 44: 18%
- 45 - 54: 19%
- 55 - 64: 17%
- 65 - 74: 18%
- 75+: 4%



Sex of respondents

- Male: 50%
- Female: 49%
- Prefer not to say: 1%

Percentages may not total due to rounding.



About Jumpmind

Known for its cloud-native, mobile Point of Sale (POS) platform, Jumpmind offers the most modern and technologically leading POS and unified promotions to support inspired shopping experiences that empower both shoppers and the retail associates who serve them.

While most POS platforms are designed to meet retailers' current needs, Jumpmind builds a system designed for the future. Business requirements can shift, customer expectations can evolve, and hardware preferences change over time. That's why Jumpmind solutions — which are built by retail industry veterans — are technology agnostic, adaptable and future-proof, enabling retailers to stay ahead of the curve through agility, at scale.

For more information, visit www.jumpmind.com

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