

RETAIL CX IN Q3 2026: WHAT IT TAKES TO SUSTAIN STRONG STORE PERFORMANCE

Store Execution Pressure Map



91.9%

Global
Customer
Satisfaction
score

15.0M

Customer
feedback
responses
analyzed



Service execution

Best performing



Price perception

Highest friction

Retail CX remained strong in Q3, reaching 91.9% across 15 million in-store feedback responses.

Beneath the headline score, performance is becoming more uneven. Service execution and store environment remain the strongest parts of the customer experience, while product, transaction and price-related friction sit materially lower.

The trading pattern is equally clear. CX performs strongest earlier in the day and through the middle of the week, before weakening across later trading hours and into the weekend. This suggests that maintaining strong performance requires more than consistent standards; it also depends on how effectively stores adapt their execution as trading conditions change.

For retailers, sustaining strong performance means protecting frontline service while strengthening the operational areas that support it. Reliable product availability, smooth transactions and clear value perception all contribute to a consistent customer experience, particularly as trading conditions change.

What this means

Q3 reveals a growing divide between strong frontline performance and the wider operations supporting it. Service and store standards continue to improve, while product, transaction and price-related experiences lose ground. Sustaining strong performance means addressing these gaps together.

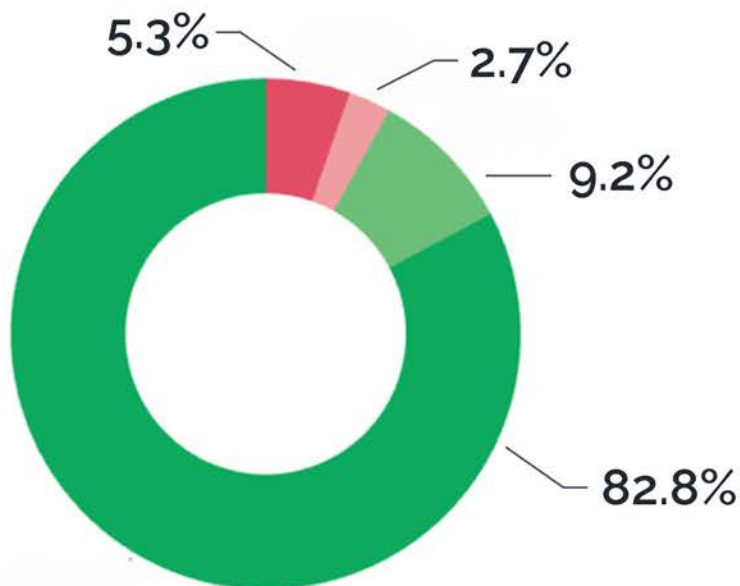
For store teams

Protect service standards while focusing on the friction customers experience beyond frontline interactions. Pay particular attention to product availability, checkout readiness and clear pricing, especially during later trading hours and weekends.

For operational leaders

Prioritize consistency across stores and trading periods. Use recurring feedback patterns to guide staffing, replenishment and management coverage, while addressing the product, transaction and value gaps that limit overall performance.

Q3 CX SOFTENS AS TOP-END SATISFACTION SLIPS



Customer Satisfaction Benchmark

91.9%

- Very happy
- Happy
- Unhappy
- Very unhappy

Retail CX reached 91.9% in Q3, down 0.5 percentage points from 92.4% in Q2. While overall satisfaction remains strong, the response distribution shows that the change is concentrated most heavily at the top end of the experience.

Very Happy responses fell 0.5 percentage points to 82.8%, the largest shift in Q3, while Unhappy and Very Unhappy both rose by 0.2 points. The combination suggests some experiences are losing their edge rather than simply moving within the positive end of the scale.

This matters because the shift goes beyond a marginal change in the overall benchmark. Fewer customers are reporting the most positive experience, while dissatisfaction has also edged upward, pointing to pressure at both ends of the satisfaction distribution.

For retailers, the priority is not simply recovering the overall score. It is understanding what supports exceptional experiences, where execution is losing ground and how to sustain strong performance as trading conditions change.

What moved in Q3?

Improved

- Store environment ▲ 0.5p
- Service execution ▲ 0.2pp

Weakened

- Transaction friction ▼ 0.3pp
- Price perception ▼ 0.6pp
- Product & inventory ▼ 1.1pp

Q3 performance moved in two directions

Already strong service and store standards improved further, while product, transaction and price-related experiences lost ground.

Product & inventory saw the sharpest decline

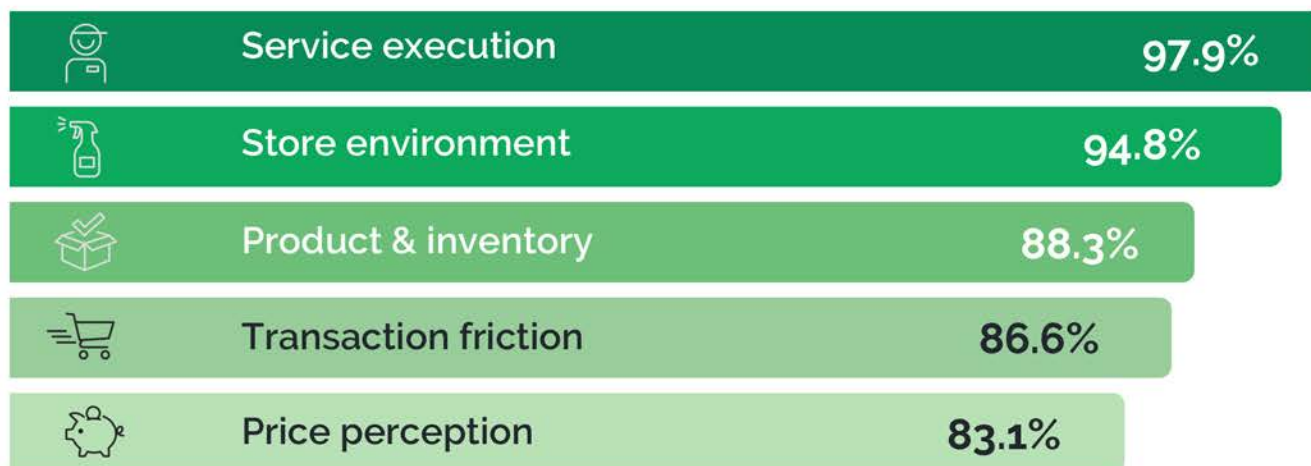
With availability still performing comparatively well, weaker product quality and selection point to pressure beyond simply keeping shelves stocked.

Performance is diverging

Strong operational fundamentals improved while weaker areas lost ground in Q3, making targeted intervention increasingly important.

FRONTLINE STRENGTH MEETS PRODUCT PRESSURE

Retail Execution Benchmark



Q3 reinforces a clear divide in retail execution. Service and store standards remain highly resilient and improved further, while product, transaction and price-related experiences lost ground. The challenge is increasingly concentrated outside frontline service.

Service remains highly resilient, with staff friendliness, availability, speed and knowledge all performing strongly. The Q3 improvement suggests frontline teams are maintaining standards even as pressure builds elsewhere in the customer journey.

Store standards strengthened further in Q3, supported by strong cleanliness, accessibility and signage. This points to disciplined execution of the physical store fundamentals that shape the everyday customer experience.

Product performance saw the sharpest decline in Q3. Availability remains comparatively strong, while weaker quality and selection show that the challenge extends beyond stock levels to whether customers find the right products when they shop.

Checkout and price perception remain among the weakest parts of the experience. Together with product performance, these shape critical purchase moments: finding the right product, completing the transaction smoothly and feeling confident in the value received.

For retail leaders, the message is clear: sustaining strong store performance requires more than excellent frontline service. Product availability, checkout execution and perceived value must work together to deliver a consistently positive customer experience.

Operational strength: Service execution

Strong frontline performance reflects disciplined staffing, clear ownership and consistent routines. Protecting these fundamentals helps maintain service quality as trading pressure builds.

For Q4: Maintain staffing discipline, coach frontline teams and protect service standards through the busiest trading periods.

Biggest Q3 pressure: Product & inventory

Availability remains comparatively strong, but weaker quality and selection show that product experience goes beyond stock levels. Customers also judge whether they find the right choice and quality.

For Q4: Look beyond stock levels. Review assortment, product quality and availability together to identify where the experience is losing ground.

THE PRESSURE PATTERN PERSISTS

Q3 reinforces a recurring pattern: CX weakens as the trading day progresses and pressure builds into the weekend. Rather than isolated dips, the data shows predictable periods when consistent execution becomes harder, giving operators a clearer view of when performance is most vulnerable.

These patterns give retailers an opportunity to act before performance slips, aligning staffing, replenishment and management coverage with the periods when execution is most vulnerable. Sustaining strong performance means preparing for the moments when execution becomes harder to maintain.

Hourly Performance Pattern



Store Execution Pressure Map



KEY OBSERVATIONS

1. Pressure builds with demand

CX declines as feedback volume builds through the day, suggesting consistent execution becomes harder to sustain during busier trading periods.

2. Weekends amplify the risk

Performance weakens earlier and remains under pressure for longer, increasing the challenge of maintaining consistent execution across the day.

3. Recovery remains partial

CX improves as feedback volume falls after 20:00, but remains below earlier-day levels, showing that performance only partially recovers.

WHERE OPERATORS SHOULD FOCUS

Plan for recurring pressure

Use established patterns to align staffing, breaks, replenishment and management coverage with the periods when CX is likely to weaken.

Focus metric: CX variation by hour and weekday.

Protect later-day execution

Maintain operational standards as the day progresses through effective handovers, store recovery and consistent frontline coverage

Focus metric: CX decline across the trading day.

Prepare for weekends

Match staffing, replenishment and leadership coverage to the earlier and more sustained weekend pressure.

Focus metric: Weekend vs midweek CX gap.