

PRESENTATION

The High-Value Doorstep: When the Last Mile IS the Brand Moment



MODERATOR

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SPEAKER

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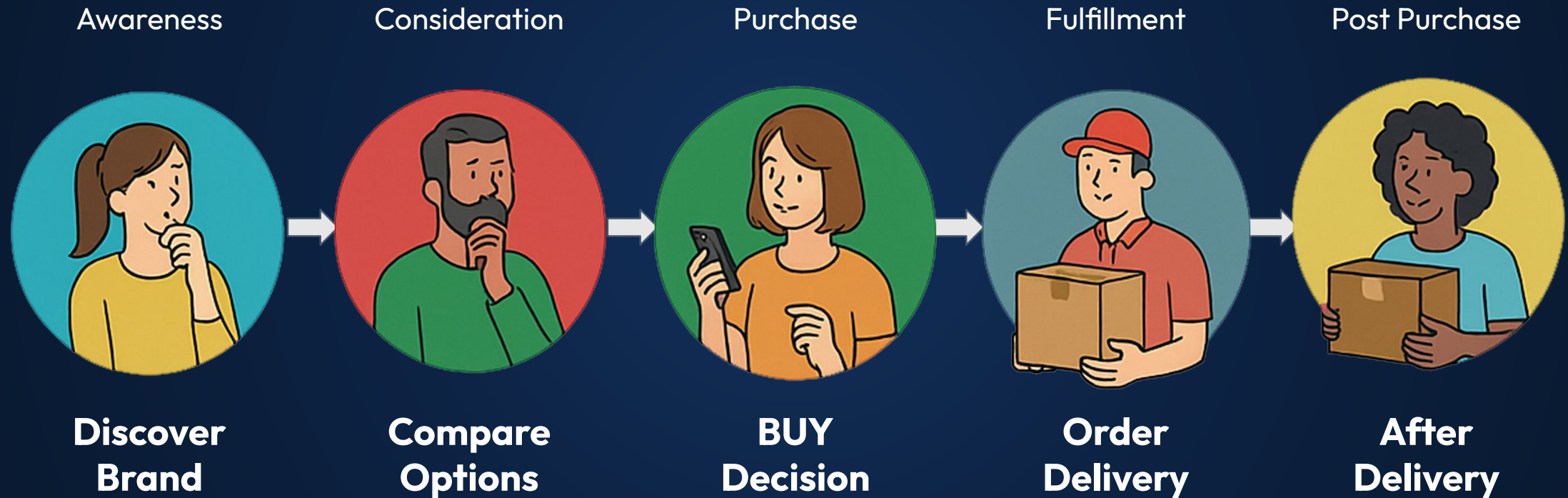
SPEAKER

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D2C Supply Chain Senior
Director, Europe & APMEA



Customer Journey Flow

5-Step Journey Framework



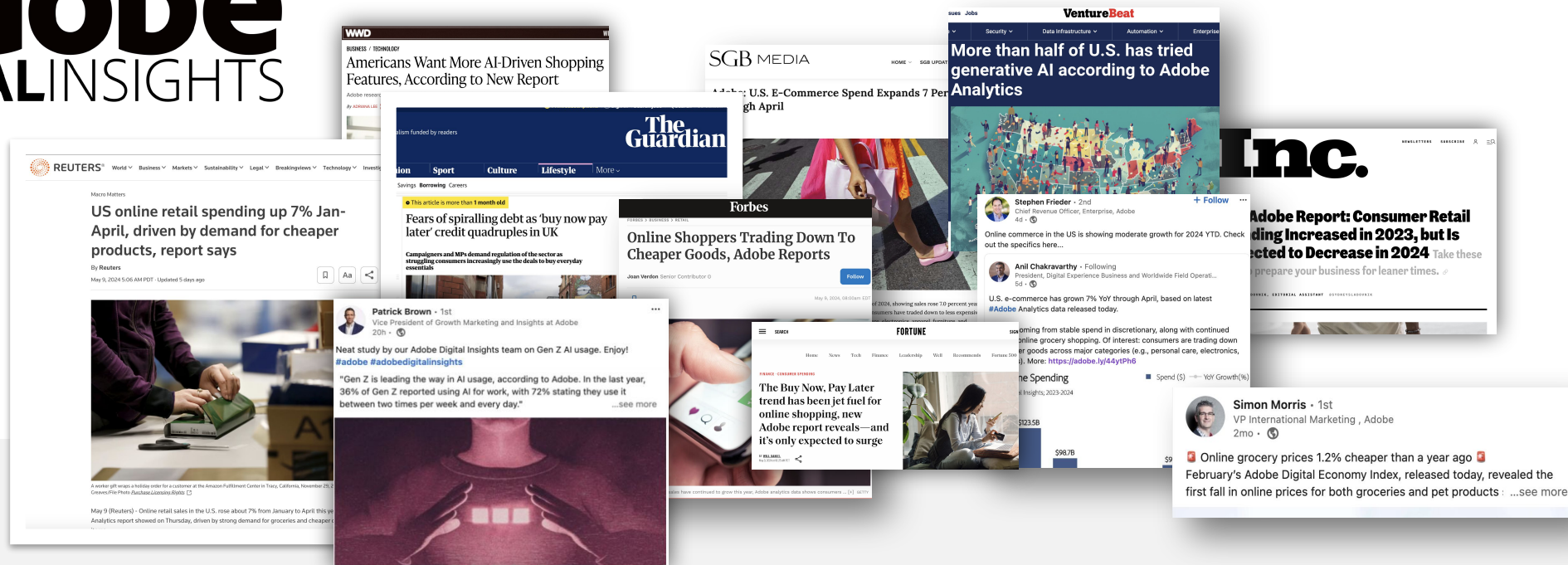
AI Traffic Trends Report

Adobe Digital Insights
August 2026

Adobe



Adobe DIGITALINSIGHTS



Methodology

Adobe Digital Insights (ADI) offers the most comprehensive set of insights of its kind based on analysis that covers more than *one trillion* visits to U.S. retail sites and more than *100 million* SKUs, more than any other technology company. Analysis is significantly more in-depth and precise compared to other data sources because only Adobe has access to this volume of real-time, granular, transactional consumer data. It is aggregated and anonymized to provide insights on consumer spending and emerging trends.

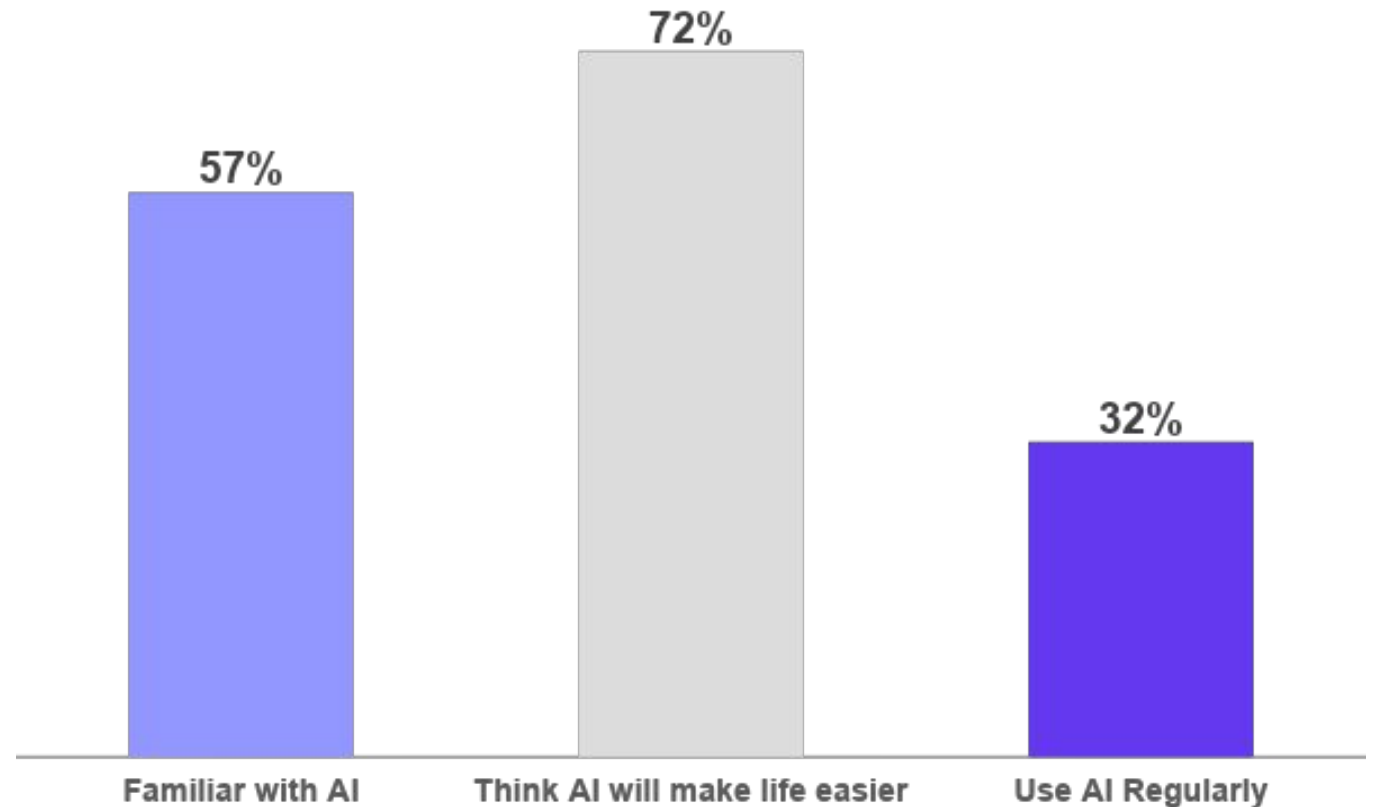
To learn more about ADI and the opportunity to receive bespoke reports, speak with your Adobe Account Team.

Adobe additionally conducted consumer surveys of more than 5,000 U.S. respondents in July 2026 on the use of, and attitudes toward, generative AI (GenAI), focusing on how consumers use AI in their online shopping journey—from discovery and product research to purchase decisions. The survey reveals a clear story of growing usage and improving perceptions of GenAI.

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Awareness and Optimism are High, but Usage Yet to Catch Up

- According to the July 2026 Adobe Consumer Survey, AI awareness remains high, with 57% of respondents reporting they are familiar with it.
- Even more respondents (72%) believe that AI will make life easier.
- However, despite strong awareness and positive expectations, only 32% report using AI regularly.



AI Referrals: Industry Snapshot

AI-Driven Traffic Accelerates Across All Industries in July 2026

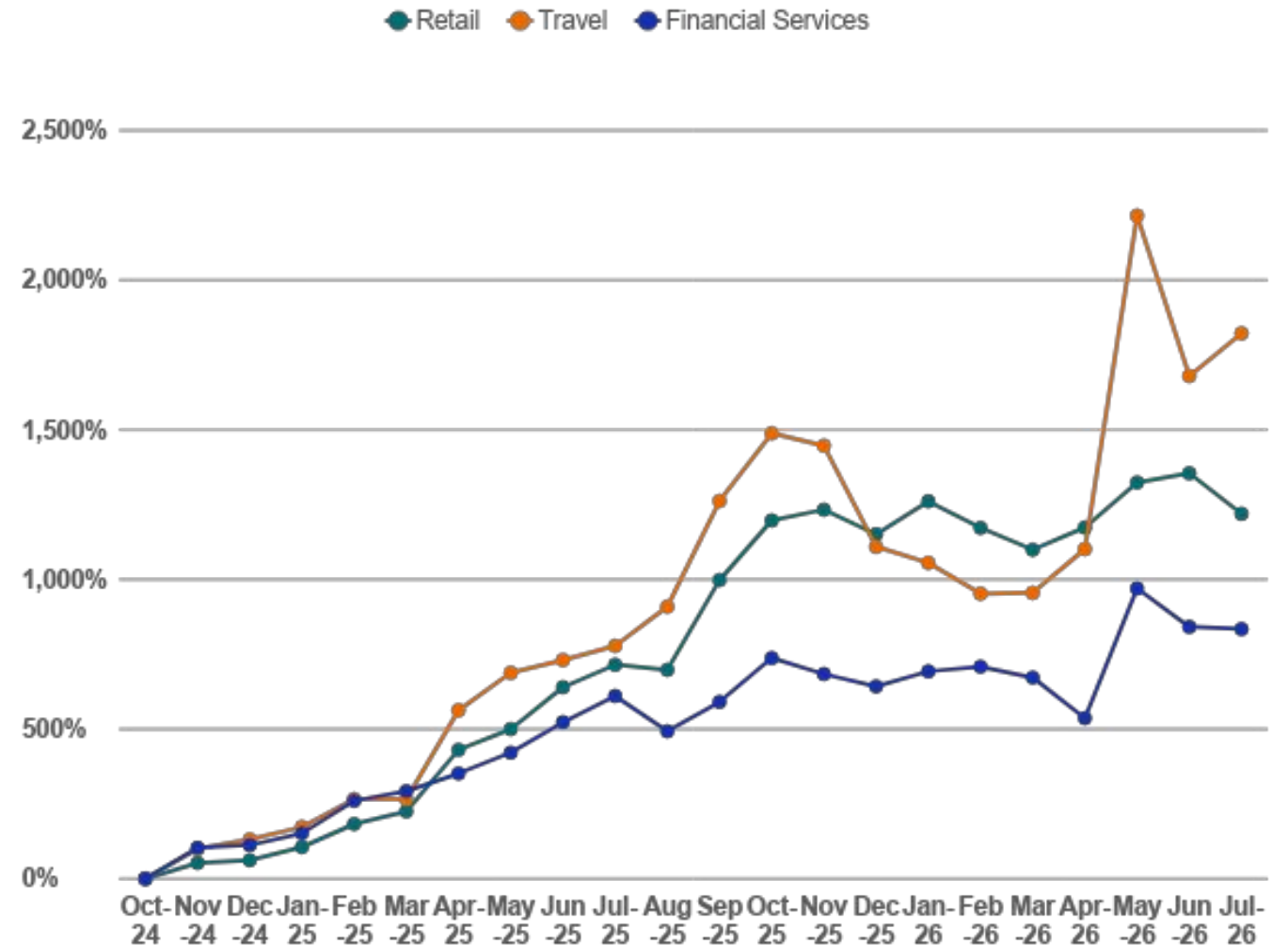
Retail, Travel, and Financial Services saw an AI traffic boost during July 2026:

- Retail: **+62% YoY**
- Travel: **+119% YoY**
- Financial Services: **+31% YoY**

In the July 2026 Adobe Consumer Survey, 55% of consumers say they are turning to AI more, and 59% having used AI in the past week (up from 54% and 58% in March 2026).

Growth in AI Visit Share by Industry

Adobe Digital Insights, October 2024 – July 2026



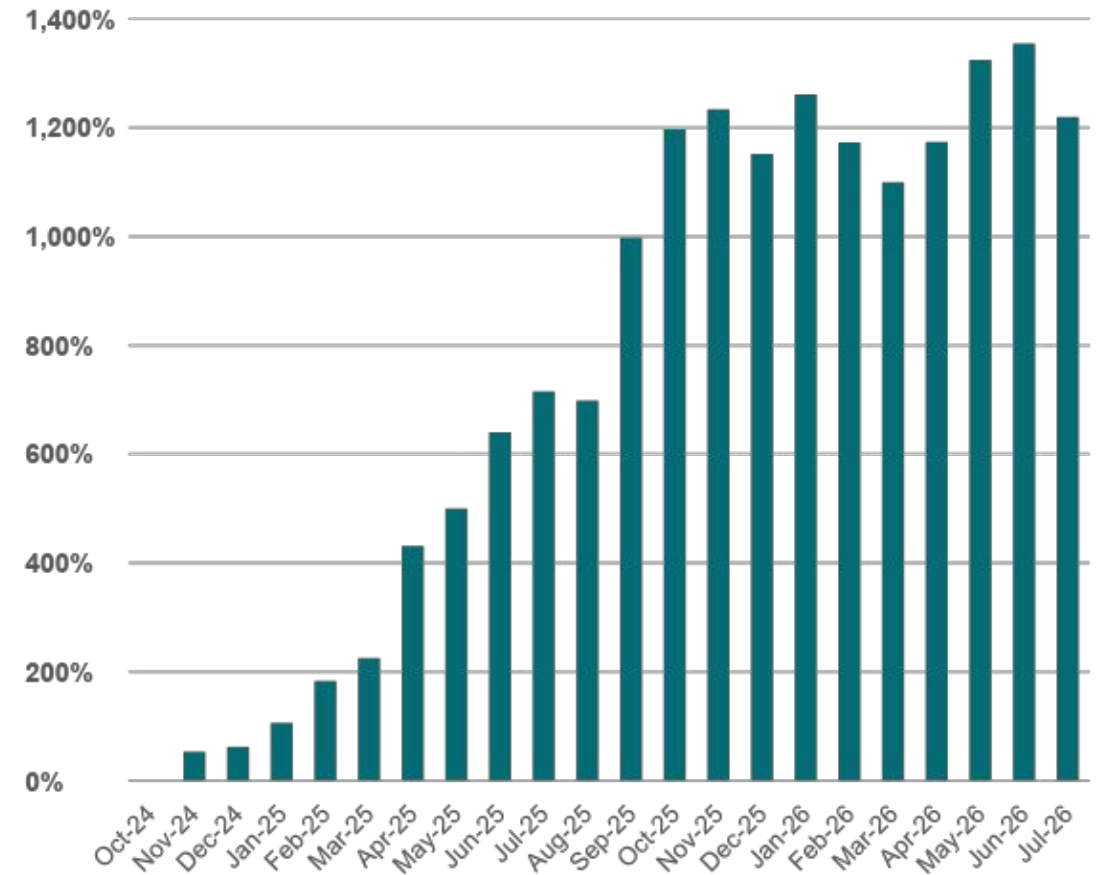
Retail

AI-Driven Traffic to Retail Sites Up 62% YoY in July 2026

- Al-driven retail traffic continues to hit new highs, with July 2026 seeing **62% growth YoY**.
- The sustained growth through the first half of the year and into the summer reinforces that AI-referred traffic is here to stay, signaling a permanent change in how shoppers find and engage with retail brands.
- According to the July 2026 Adobe Consumer Survey, **42% of consumers have used AI assistants** for online shopping (a 4-point jump since March 2026), and 83% of those who use AI for shopping agree that AI assistants have improved their online shopping experience.

Growth in AI-Driven Visit Share (Retail)

Adobe Digital Insights, October 2024 – July 2026



AI Conversion Is Now 60% Higher

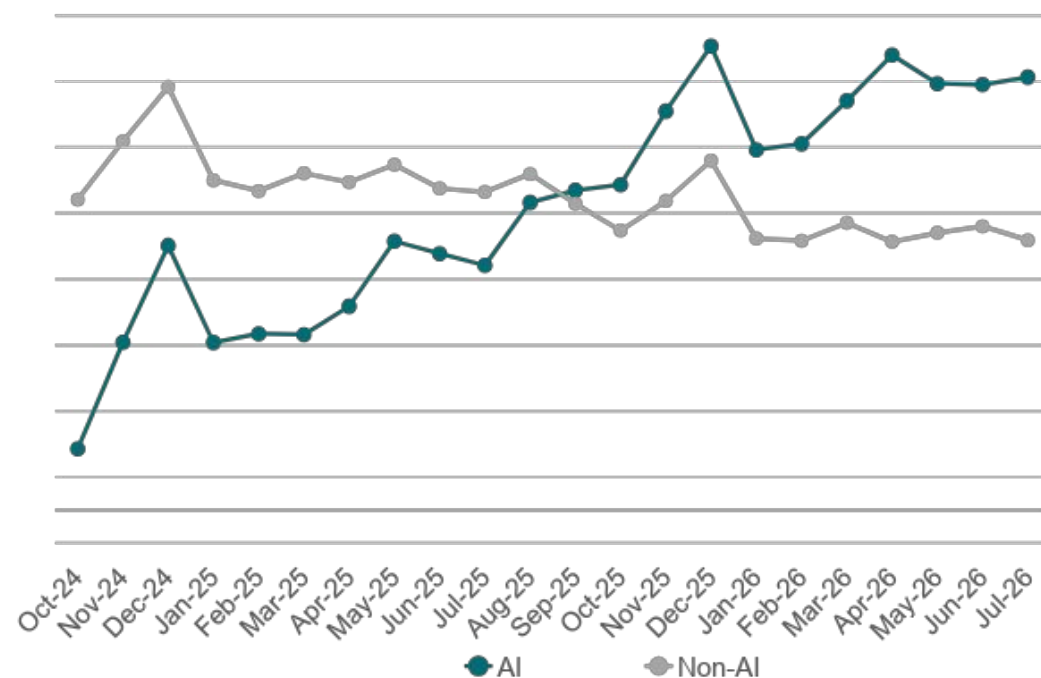
- In July 2026, AI-referred retail visitors converted at a rate **60% higher than non-AI traffic** (up from 54% in May 2026). That gap has completely reversed from where it stood a year earlier, when non-AI traffic was still comfortably out-converting AI visitors.
- Consumer sentiment backs this up. Trust in AI tools is growing, with 66% of consumers agreeing that GenAI provides accurate results and 38% saying they trust AI more than they used to.



Key Insight: Shoppers who use AI assistants are less likely to regret a purchase. **77%** of consumers using AI for online shopping report feeling more confident in a purchase after using an AI assistant; **69%** say they are less likely to return an item they bought with the help of an AI assistant.

Monthly AI vs. Non-AI Conversion Rate (Retail)

Adobe Digital Insights, October 2024 – July 2026

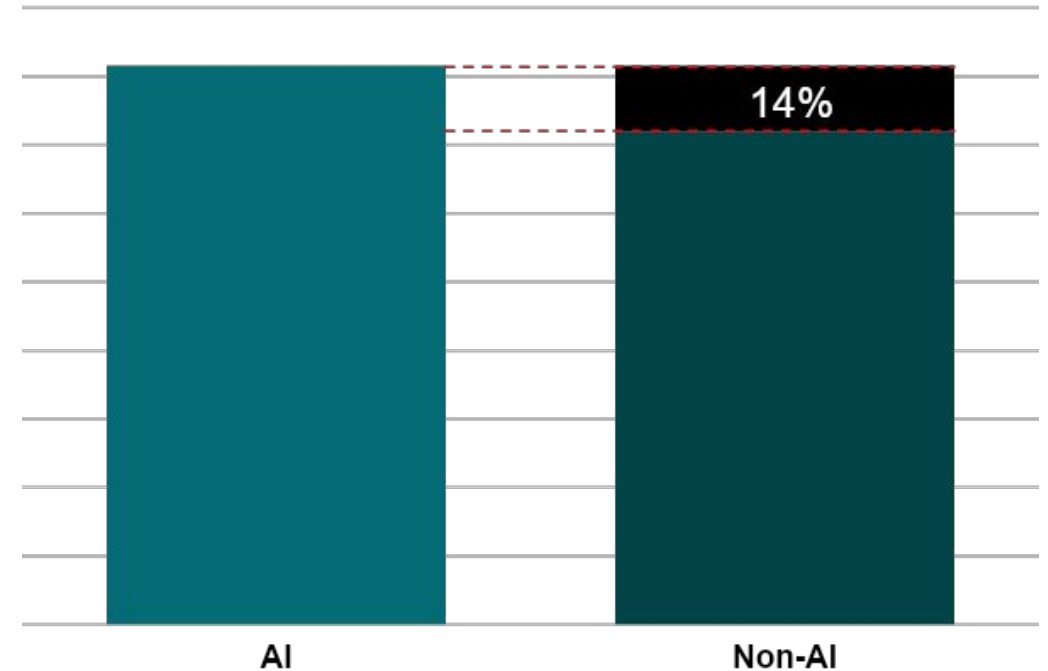


AI-Referrals Drive 14% Higher Engagement Than Non-AI Channels

- AI-referred retail visitors showed **14% higher engagement than non-AI traffic** in July 2026, roughly the same from May 2026 (15%). This continues a pattern of steady growth from the 9%-14% range seen throughout late 2024 and 2025.
- This engagement premium has now held consistently for more than a year, suggesting this is a durable trait of AI-referred traffic rather than a one-time spike.
- Shoppers arriving via AI assistants tend to know what they want before they get there, and the data suggests they are less likely to leave without buying.

AI vs. Non-AI Engagement Rate (Retail)

Adobe Digital Insights, July 2026

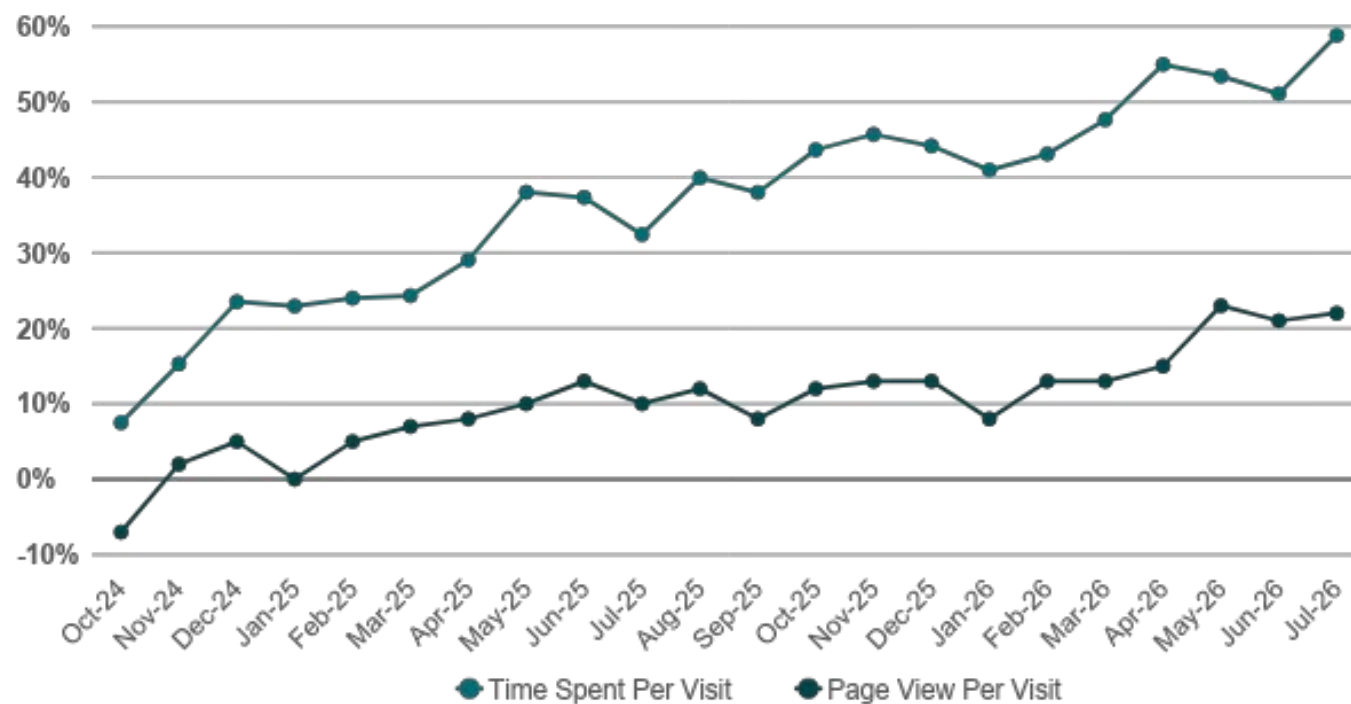


AI-Referred Shoppers Linger Longer, Outpacing Other Channels

- In July 2026, AI-referred retail visitors spent **59% more time on site than visitors from other channels**, which marks the highest time-on-site advantage to date (up from 53% in May 2026).
- Browsing depth is accelerating too. AI-referred users viewed **22% more pages per visit than non-AI visitors** in July, roughly the same from May 2026 (23%). Both metrics moving up together suggest AI is not just driving longer visits, but more exploratory ones as well.
- The widening gaps in both time and pages reinforce the same signal: AI assistants are delivering shoppers with genuine interest, not just a fleeting click.

Monthly AI vs. Non-AI Time Spent per Visit/Page Views per Visit Percent Difference (Retail)

Adobe Digital Insights, October 2024 – July 2026



AI-Referred Consumers Are 34% Less Likely to Bounce

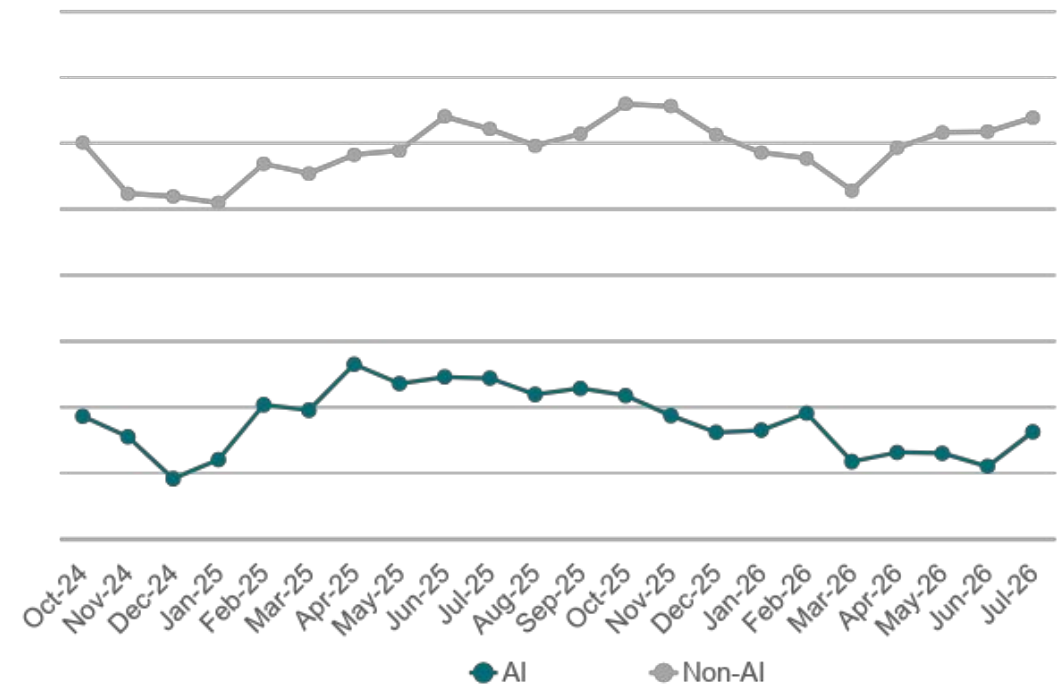
- AI referrals consistently outperform in bounce rate, reflecting stronger content relevance and user intent.
- AI-referred retail visitors were **34% less likely to bounce** in July 2026 than visitors from other channels, a slight decrease from the record gap recorded in May 2026 (36%).
- The consistency behind that number is just as telling. AI bounce rates have held in a tight 17%-20% band for more than a year while non-AI rates hover near 27%. The gap is not a fluke of any single month; it reflects AI assistants reliably matching users to content that meets their expectations.



Key Insight: **66%** of consumers say they visit a brand's website directly to verify an AI recommendation, and **89%** say they click on links or sources an AI assistant provides.

Monthly AI vs. Non-AI Bounce Rate (Retail)

Adobe Digital Insights, Oct 2024 – July 2026

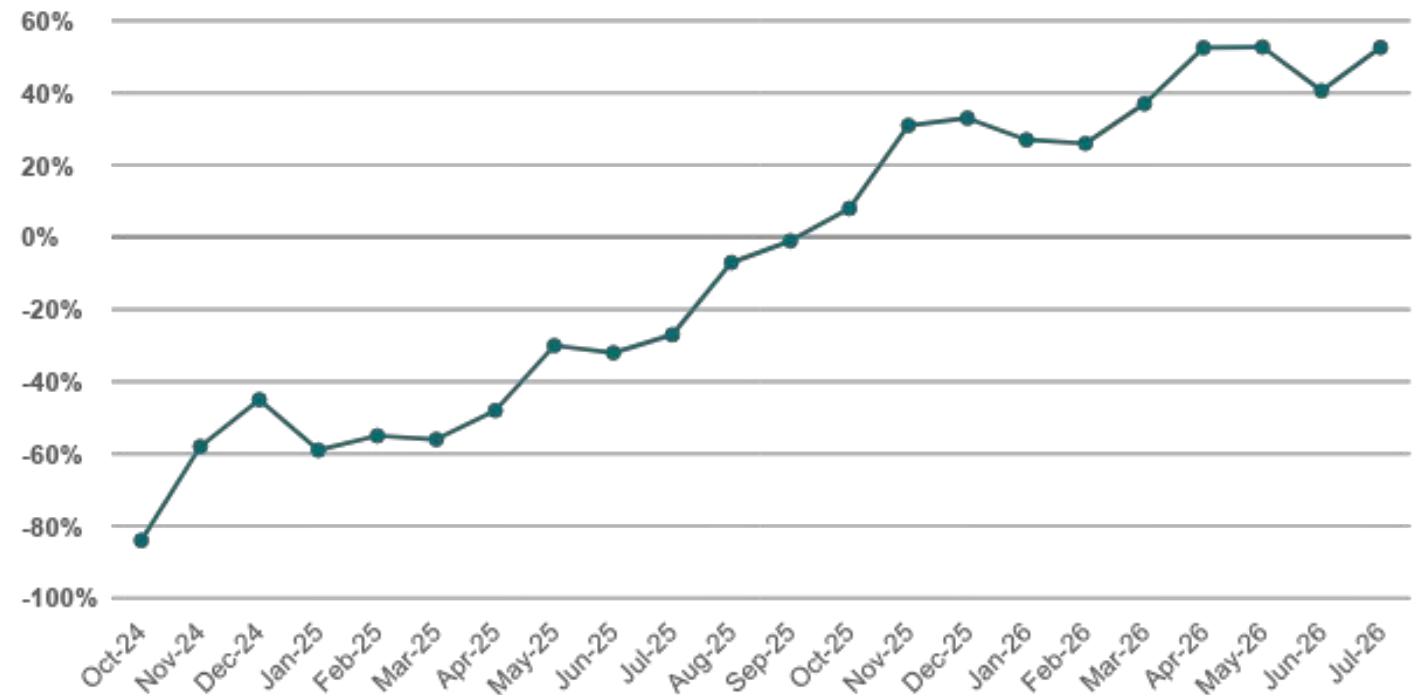


AI Visits Are Worth 53% More Than Non-AI Visits

- Al-referred retail visitors generated **53% more revenue per visit than non-AI traffic** in July 2026, the strongest RPV advantage on record (on par with May 2026) and a sharp climb from 37% in March.
- The contrast with a year ago is stark. Twelve months prior, non-AI visits were worth 128% more than AI visits. That gap has not just closed, it has fully inverted, with AI-referred visits now commanding a substantial premium.
- The July 2026 figure shows the advantage is not plateauing. As AI assistants get better at surfacing relevant products to higher-intent shoppers, the revenue gap continues to widen.

Monthly AI vs. Non-AI Revenue per Visit Percent Difference (Retail)

Adobe Digital Insights, October 2024 – July 2026

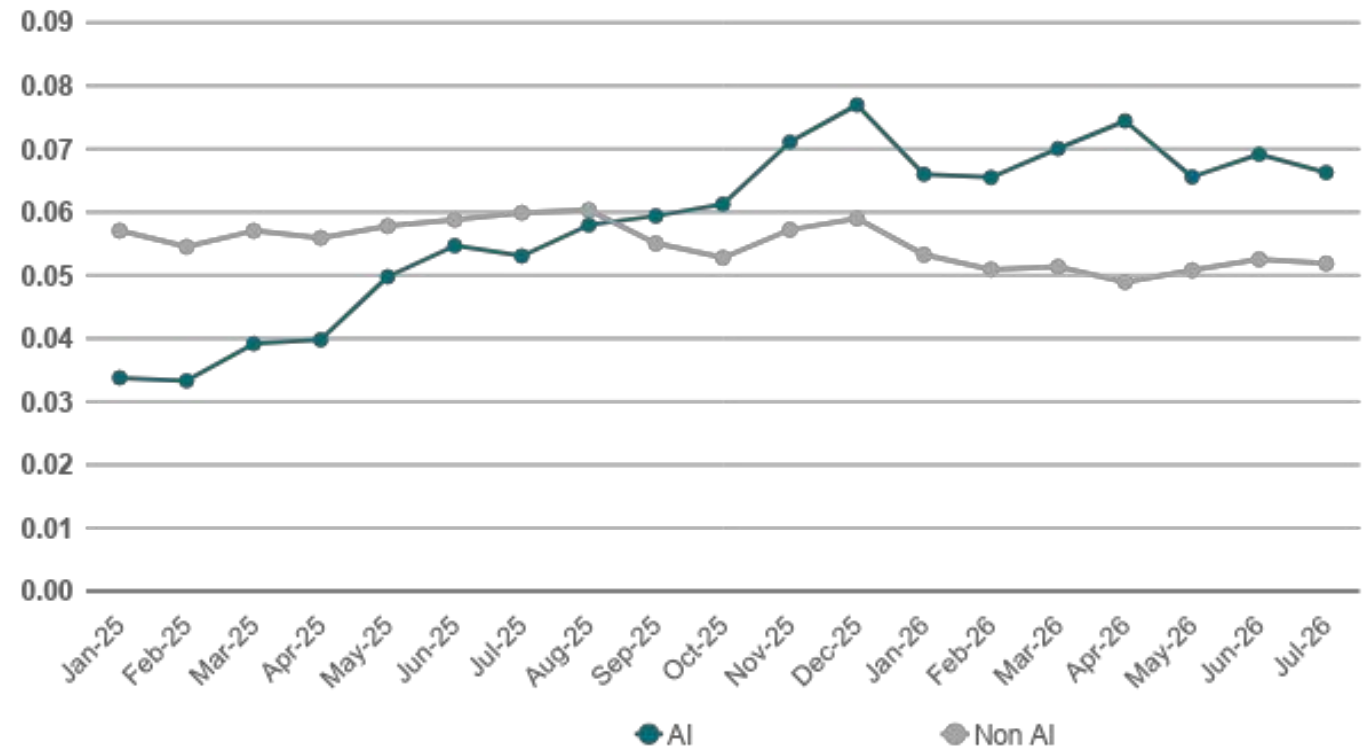


AI Add-to-Cart Rate is 28% Higher

- AI-referred visitors **added items to cart at a 28% higher rate** than non-AI traffic in July 2026, continuing to hold steady after peaking at 52% in April 2026 – the strongest gap on record for this metric.
- This turnaround is a complete inversion of where this metric started in January 2025, when non-AI visitors were adding to cart at a 69% higher rate.
- AI-referred visitors pulled ahead in September 2025 when they added to cart at a higher rate than non-AI traffic for the first time.

AI vs Non-AI Add to Cart Rate (Retail)

Adobe Digital Insights, October 2024 – July 2026



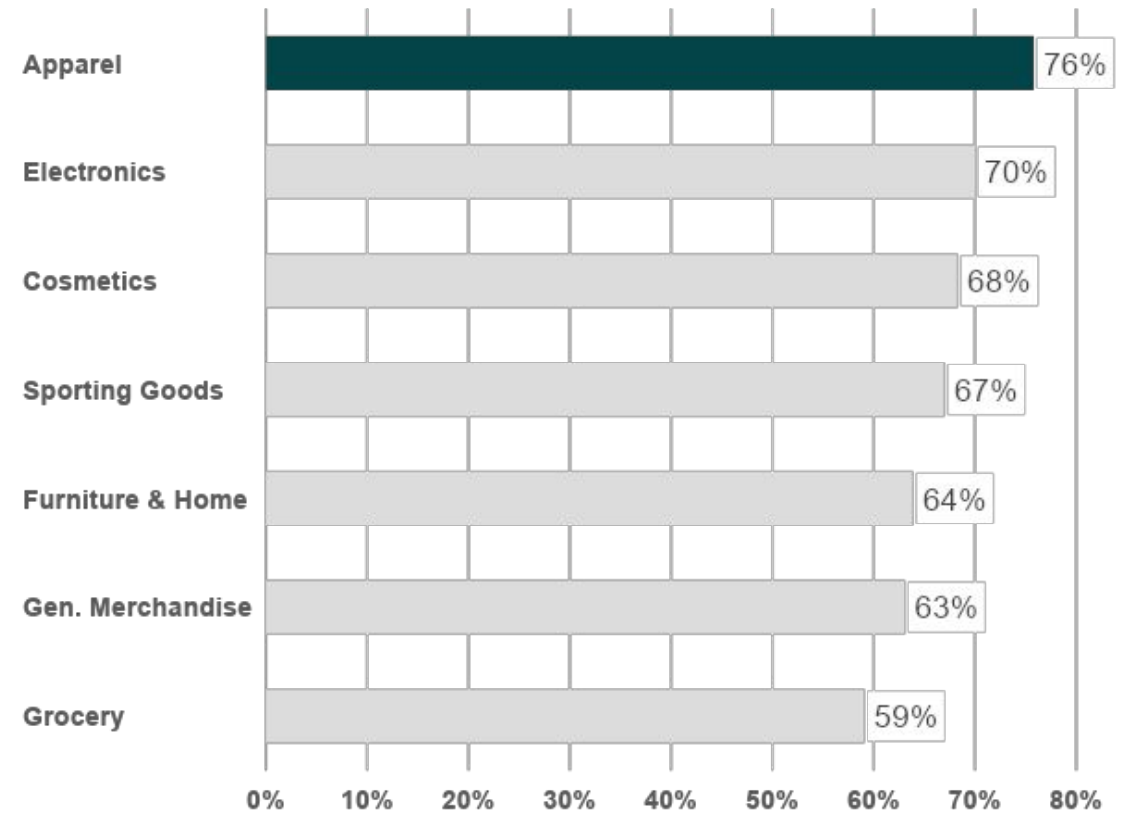
Retail AI Citation Readability

Apparel and Electronics Lead Retail AI Citation Readability

- **Apparel (76%)** leads all retail sub-industries — consistent content structure across homepage, blog, and product pages carries the category to the top this period.
- **Electronics (70%) holds second**, ahead of Cosmetics, Sporting Goods, Furniture & Home — spec-heavy product pages and structured technical content continue to support strong AI citation readability.
- **Grocery (59%) is the lowest-scoring sub-industry** — trailing General Merchandise (63%) and the rest of the field despite broad site coverage.
- **A 17-point gap separates Apparel from Grocery** — the widest sub-industry spread in this analysis, and a direct measure of how much content structure varies by category.

Overall Average Citation Readability by Retail Sub-Industry

Adobe Digital Insights, July 2026



Electronics Leads Both Content and Browse Pages

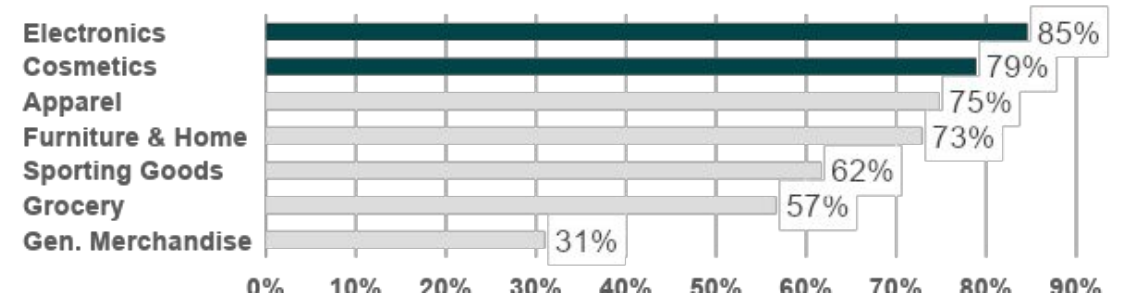
- **Electronics (85%) leads Blog & News pages** — followed by Cosmetics (79%) and Apparel (75%); editorial and educational content remains a strength across several categories.
- **General Merchandise (31%) scores lowest on Blog & News** — the lowest score among all seven sub-industries on this page type.
- **Electronics also leads Category/Department pages (76%)** followed by Apparel (69%) and Cosmetics (68%) — well-structured category pages reinforce strong AI citation readability.
- **General Merchandise (51%) ranks lowest on Category/Department pages** — the greatest opportunity to improve browse-page readability.

Key Insight: Content-rich and browse-oriented experiences consistently achieve the highest AI citation readability. Electronics leads both page types, while stronger editorial content and well-structured category pages emerge as common strengths among top-performing sub-industries.

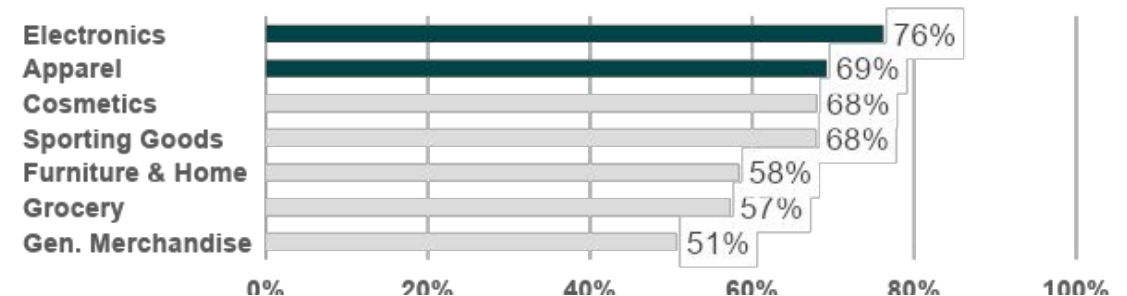
Content & Browse Pages: AI Citation Readability Scores (Retail)

Adobe Digital Insights, July 2026

Blog / News Article

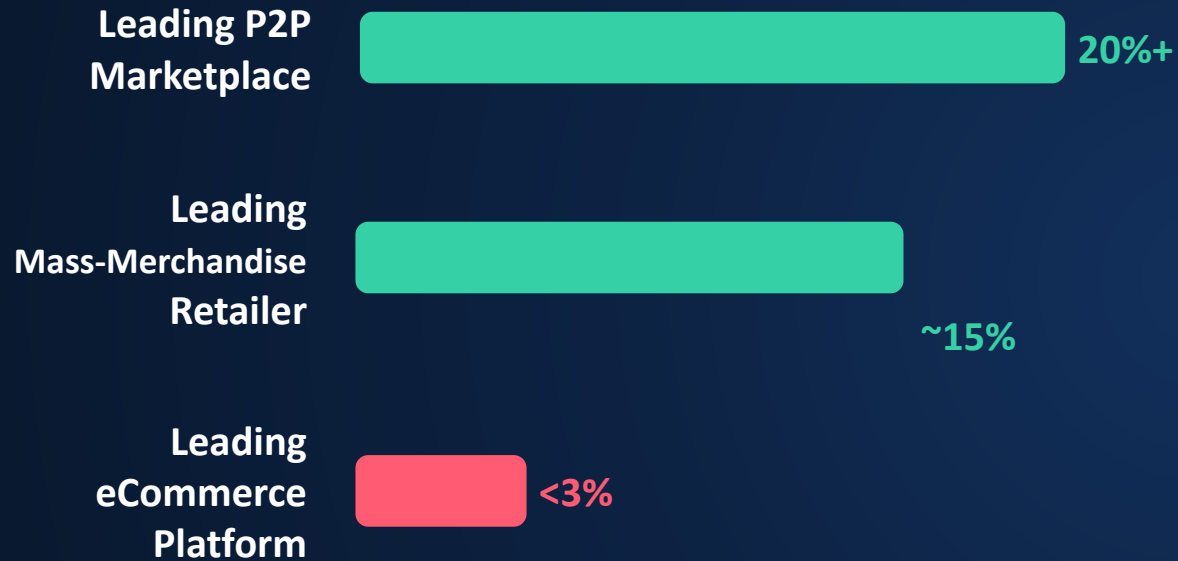


Category / Department Page



Who gets found today, and why

Share of each retailer's referral traffic coming from ChatGPT



eCommerce platform blocks AI crawlers for protecting its ad business, and handing the AI shelf to everyone else.

Sources: Similarweb via Elogic (2026); Adobe Digital Insights AI Content Visibility benchmark (Apr 2026).

Why the winners win

71%

of pages ChatGPT cites carry structured data (schema markup)

3.1×

more AI citations for pages with structured data

66%

average machine-readability of a U.S. retail product page — a third is invisible to AI

82.5 vs 54.2

AI-visibility score: best U.S. retail sites vs the laggards

AI tried to complete the transaction, and stumbled



SEP 2025

ChatGPT Instant Checkout launches

OpenAI + Stripe. Etsy live, a million Shopify merchants queued, Walmart on board. 900M weekly users.



MAR 2026

OpenAI shuts it down

Walmart: purchases inside the chat converted ~3x lower than clicking out to walmart.com.



THE WHY

Fulfillment data wasn't machine-readable

Inventory, delivery cost, delivery promise were not exposed in structured form. LLMs were never built for commerce.

Agentic checkout didn't fail from lack of demand. It starved on missing fulfillment data.

The industry's answer: the **Universal Commerce Protocol**.

Google, Walmart, Target, Amazon, Microsoft, Stripe are now building the missing plumbing. Discovery-to-doorstep, as structured data.

The agent asks harder questions now



Can it arrive in 4 days?

delivery window, real capacity



What's the damage risk?

claims history, packaging, handling



Will installation happen first time?

2-person crew, service certainty



What's the real total cost?

delivery + install + old-unit removal



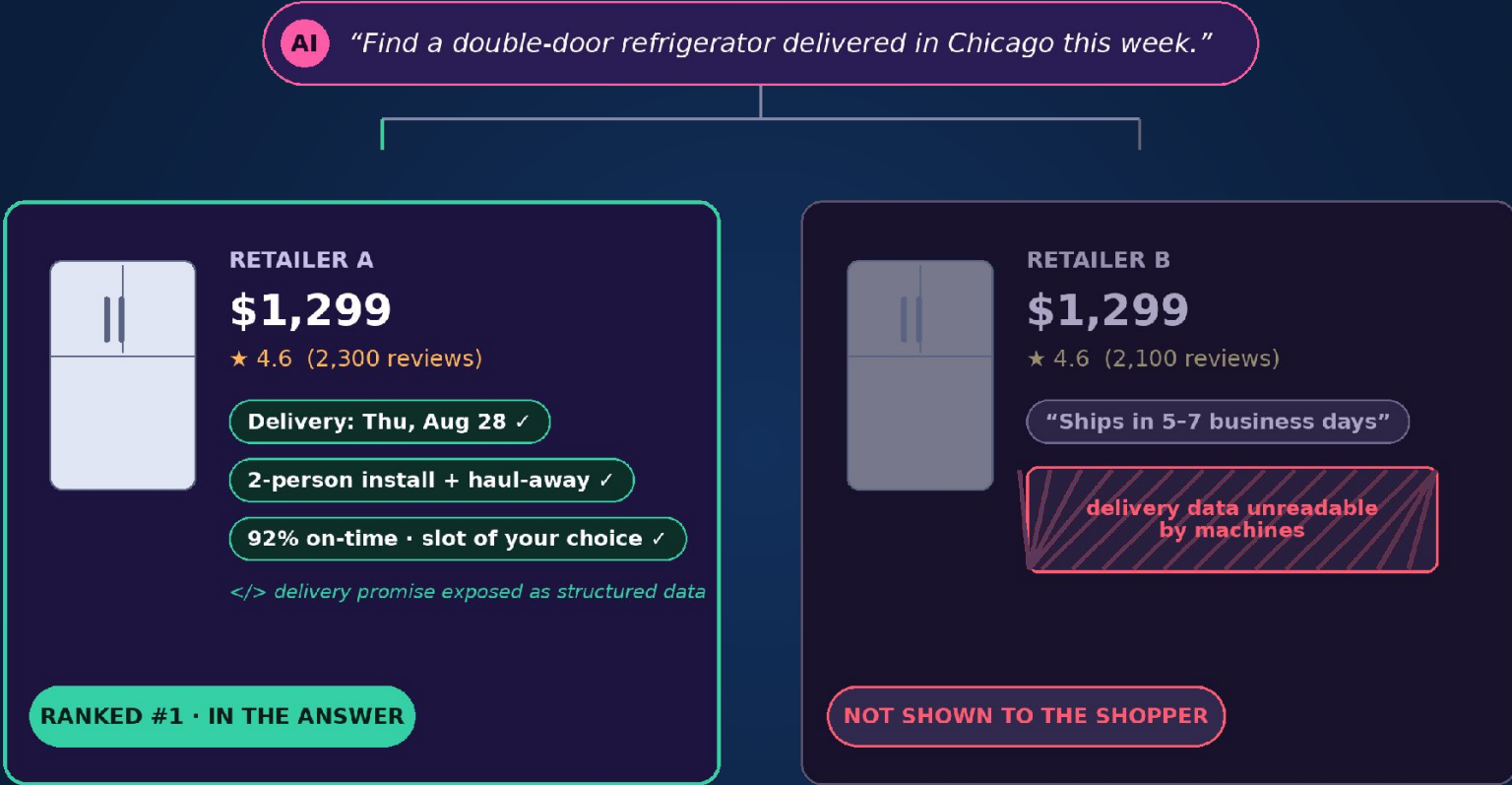
What's the carbon footprint?

route emissions, consolidated drops

**Expose these signals, or
lose the ranking to a
retailer who can.**

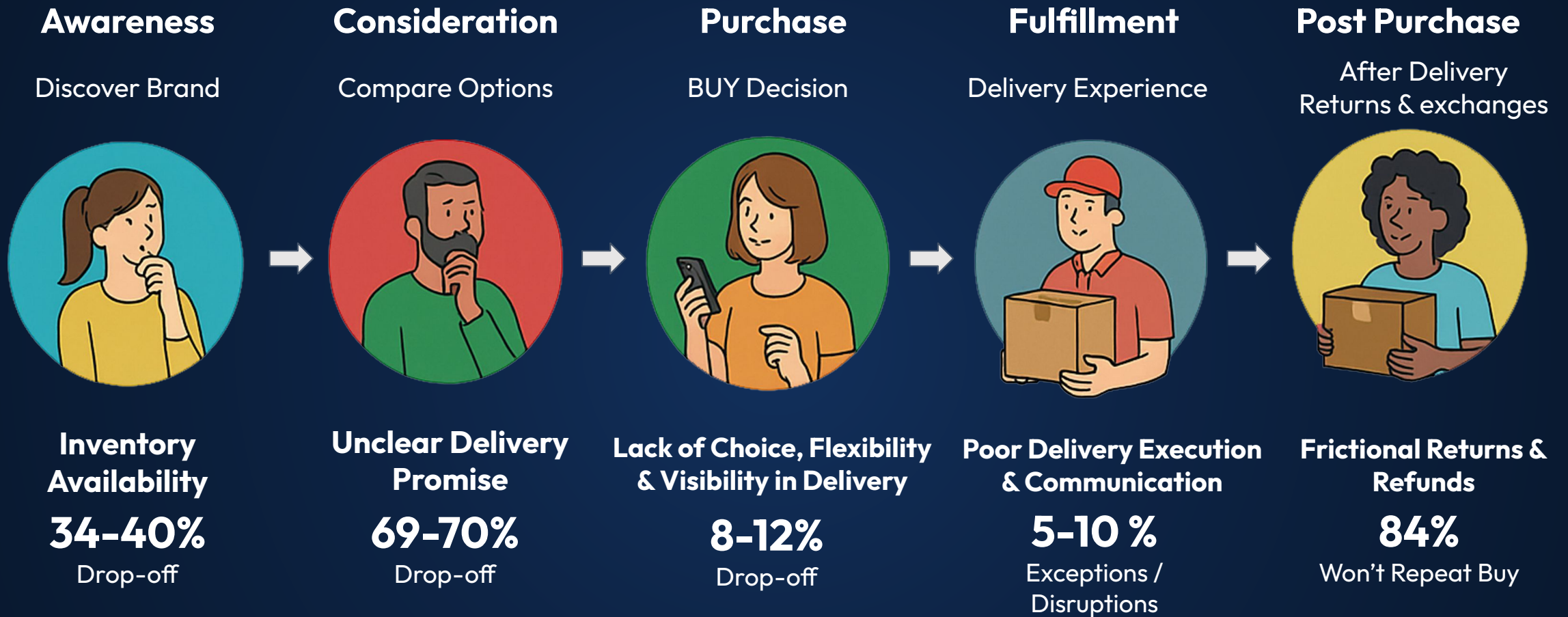
*Delivery is now a pre-purchase
ranking signal.*

Same product. Same price. One gets picked.

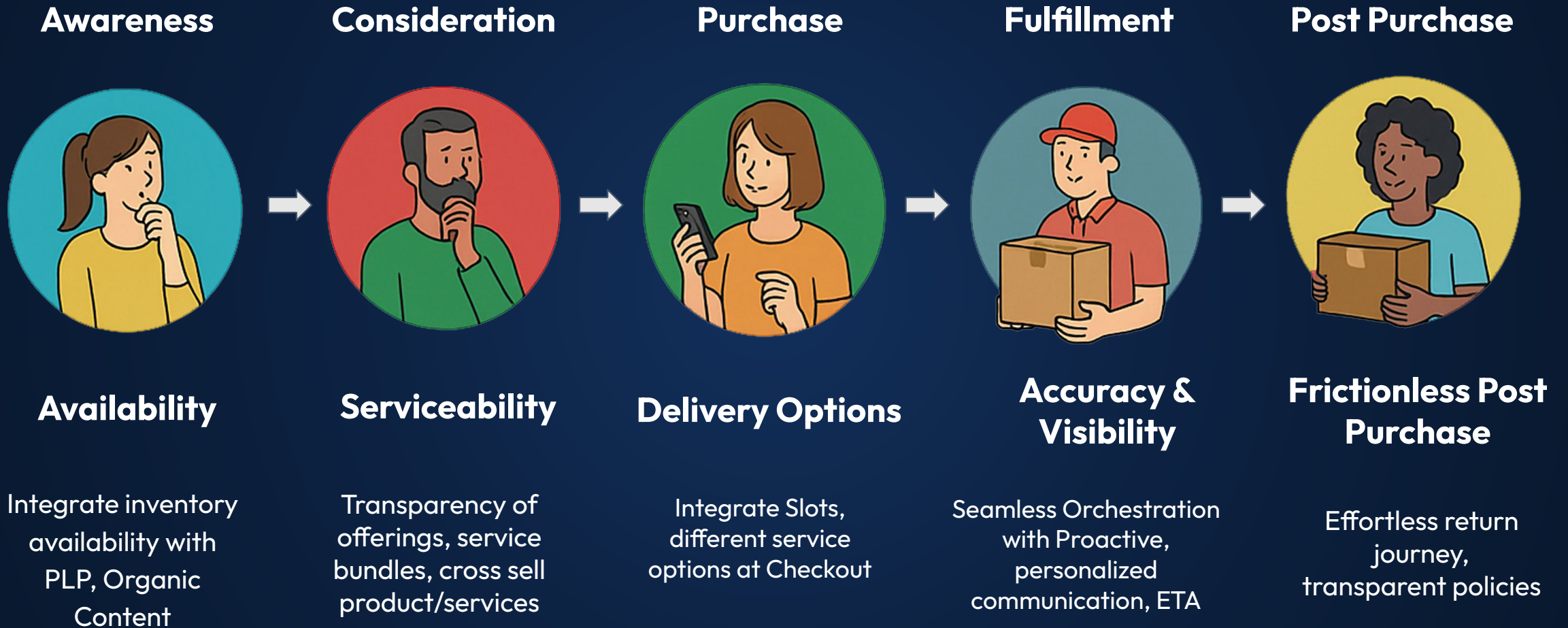


The agent isn't choosing the refrigerator. It's choosing the delivery promise.

Customer Journey Flow – Impact at Touch Points



Technology's Role to make Journey Seamless



Electrolux Europe — D2C Fulfilment Transformation

Marrying CX expectations with Logistics strategy across EU markets, turning delivery options into conversion, cost savings and faster rollouts

Challenges

- **Cart abandonment** from delivery uncertainty at checkout
- **Single-carrier reliance** with little cost leverage
- **Limited delivery choice** — no scheduled slots, pickup points or lockers
- **All Major classified appliances** shipped as costly bulk freight
- **Manual rescheduling** of orders via contact-center
- **Poor visibility** into carrier performance & cost
- **Heavy tech rebuild** affecting market rollout speed



Delivery Management System (DMS)

Carrier selection

Multi-carrier setup and choice. Selection steering through price, ranking, eco flags, etc..

Serviceability at Checkout

Multiple delivery options available for selection, fitting consumer needs: scheduled slots, PUDDO & lockers, Post offices, Curbside, Exception for MDA via Parcel, etc..

Standardized Rollout Template

Reusable WH / 3PL integration, <1s label generation, track & trace across markets

Own-Fleet Orchestration (BE)

Control tower, scheduled routing, Services offered, O2D Visibility



Benefits

Delivery Economics

Delivery Economics Optimization

Multi Carrier, Carrier Ranking, Pricing Nudges, PuDo, MDA-SDA

Checkout Conversions

Delivery/Service options at Checkout impacting Conversions

Fewer Basket Drop Outs > Better Conversion > Added Topline

Additional Revenue

Additional Revenue Opportunity

Charging Premium and Additional Services like Scheduling, VAS

Scalable Rollouts

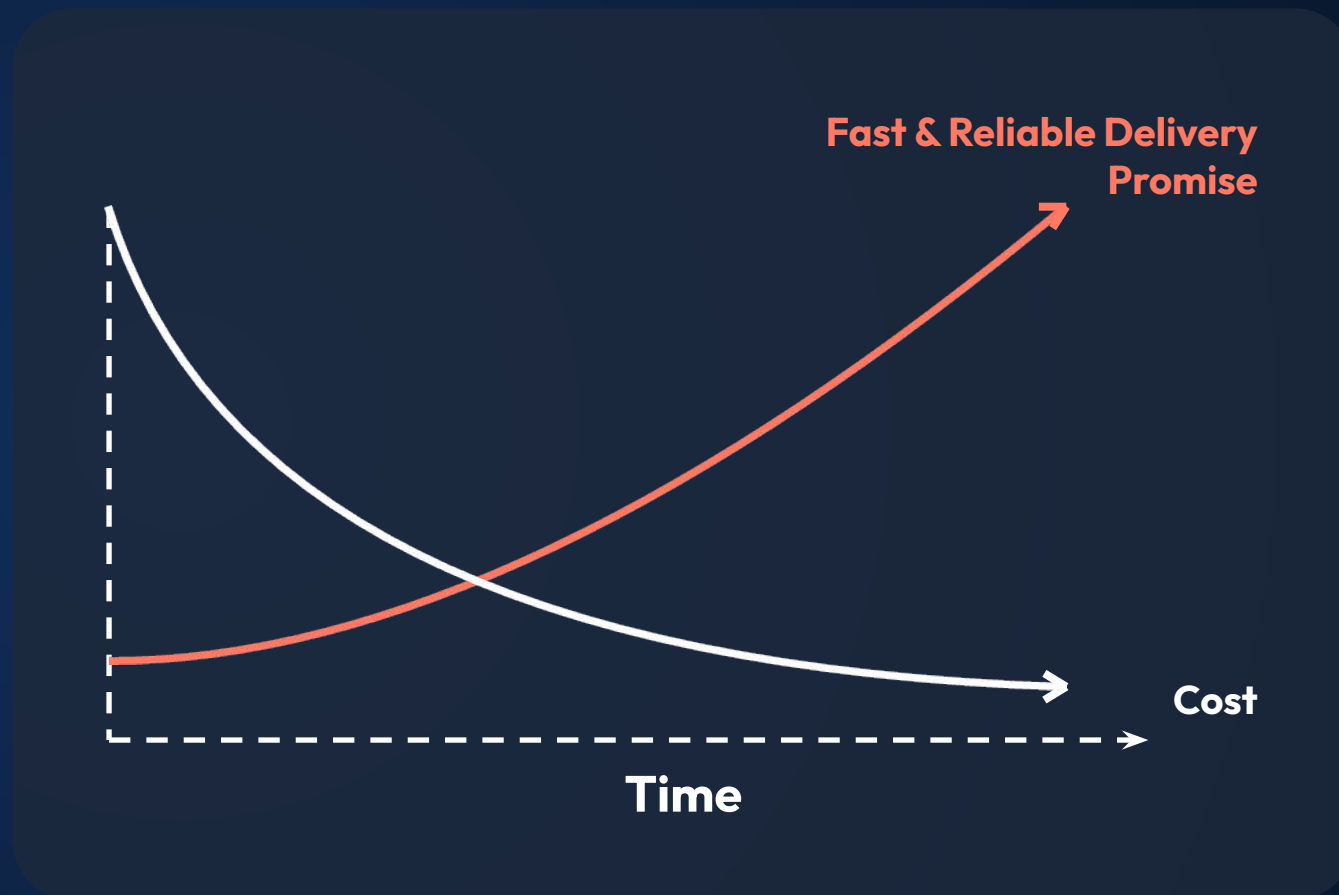
Scalable Market Opportunity through Faster Rollouts

Market rollout via reusable template (7 → 5 → 4 months)

The Perfect Last Mile

The Holy Grail of Last Mile

Fast
Reliable
Economical



Estimated Benefits, Financial Impact

Quantifiable improvements across pilot markets, projected expansions, and core operational logistics.

Pilot Market

€50k

Annual Multi-Carrier Parcel Checkout

Direct benefit realized in the pilot market through Multi-Carrier and Multi-Service checkout options.



How the Multi-Carrier Model Drives Cost Savings

STAGE 1: STARTING BASELINE

A: 100% Orders

All deliveries routed exclusively through carrier A with zero rate competition or fallback options.



STAGE 2: CARRIER B INTRODUCED

A: 98% | B: 2%

Pilot of lower-cost Carrier B, with no price and ranking steering.



STAGE 3: STRATEGIC ROUTING

A: 50% | B: 50%

Dynamic ranking and pricing rules fully shift **50% of orders** to more cost-effective options while increase revenues (1 euro charge for carrier A)

Estimated Benefits, Financial Impact

Quantifiable improvements across pilot markets, projected expansions, and core operational logistics.

**Annualized
Savings
Projection in the
pilot market
€350k**

Cost Optimization

PuDo & Locker Deliveries

-10/30% Per Delivery

Cost optimization achieved through strategic integration of pickup points, lockers and post office networks.

Bulky vs Parcel Match

-€30 Per Delivery

Savings by dynamically matching the most efficient delivery option at the PnC level. 10k matching deliveries estimated in 2027

Additional Revenue Growth

Orders with scheduled Slots

18%

Charging premium on checkout slot selection.

Value Added Services

Monetizing through VAS at checkout, eg. Curbside vs. carry-in for MDA, Cash-on-Delivery

Conversion Uplift

+1.5% - 2.0% Top Line Growth

Predicted conversion increase across key segments.

Future Game Changers

Support Centers Operational Efficiency



significant improvement expected in Contact Centre operations and automated exception management.

Customer Experience NPS & Convenience



Substantial NPS improvement driven by customer anxiety reduction and enhanced convenience throughout the delivery journey.

Three moves this Monday

1



Put a real date on your PDP

Retire “5–7 business days.” Show a serviceable, capacity-checked delivery date where the decision happens.

moves: **PDP** → **cart conversion**

2



Run the agent-visibility audit

Ask one question of your own site: can a machine read your delivery promise, cost & availability? Score your PDPs, feeds & schema like Adobe does.

moves: **AI referral share** · **citation rate**

3

Switch on proactive comms + self-serve reschedule

Tell customers before they ask. Let them fix it themselves. Watch the call volume fall.

moves: **WISMO contacts** · **repeat rate**

No capex. No re-platforming. All three are measurable inside 90 days. In time for peak.

THANK YOU



AI Demographics

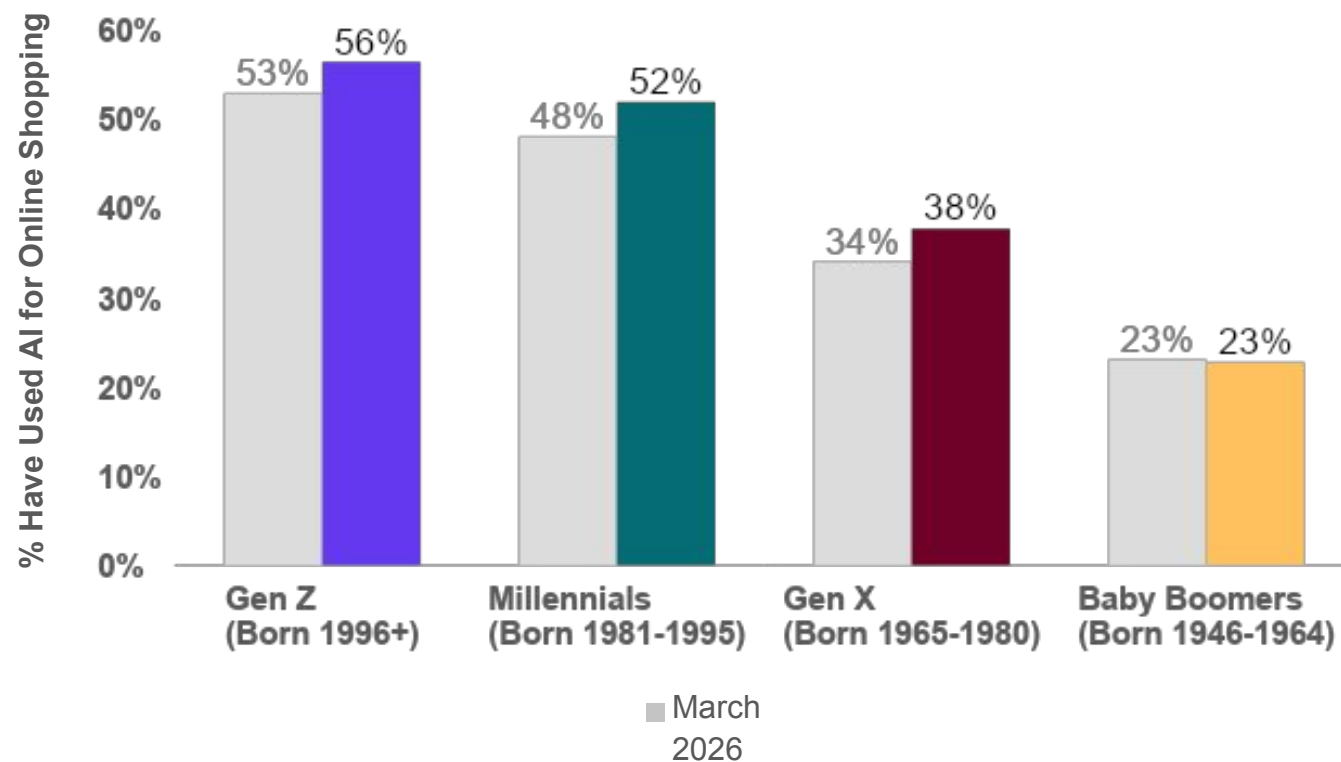
Key Insights

AI traffic momentum continues to surge	Travel flew ahead in AI-driven visit share growth in July (+119% YoY) followed by Retail (+62% YoY) and Financial Services (+31% YoY)
AI traffic is more engaged, bounces less	Across Retail, Travel, and Financial Services, AI-referred traffic is more engaged, is less likely to leave immediately, and spends more time on site
AI retail visits are worth more	AI-referred shoppers generate more revenue per visit (+53%) than non-AI traffic, a massive swing from just 12 months ago when non-AI visits were worth 128% more
Conversion gap has disappeared in Retail, narrowed in Travel	AI retail visitors now convert at a 60% higher rate than non-AI traffic; in Travel, non-AI sees higher conversion, but the gap has narrowed to just 1% in July
Structured, informational content wins, but, dynamic content struggles	Blogs, guides, FAQs, and support pages consistently have the highest AI citation readability across all industries. Booking, checkout, and account-creation flows consistently score lowest, regardless of industry.
AI now rivals search on trust	95% of consumers who turn to AI say its responses are at least as trustworthy as a traditional search engine, rising to 97% among regular users.

Younger Generations Lead AI Adoption for eCommerce

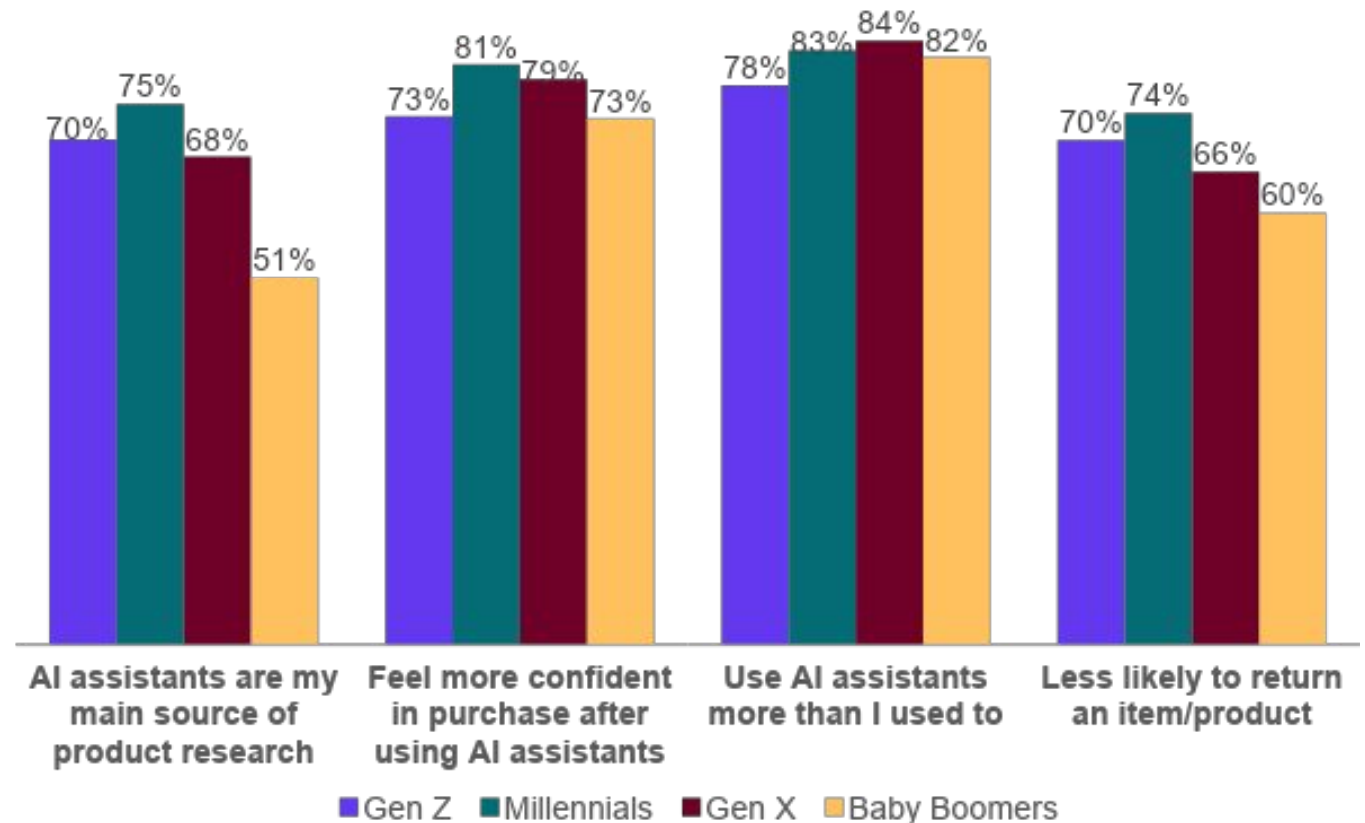
- Unsurprisingly, younger generations lead AI adoption for online shopping: **56%** of Gen Zs and **52%** of Millennials have used AI assistants compared to **38%** for Gen X and **23%** for Baby Boomers.
- Gen Z also leads in using AI for tech support: **63%** have used AI to understand or troubleshoot tech products compared to **47%** of Gen X and **30%** of Baby Boomers.

AI Adoption for Online Shopping by Generation
US July 2026 Adobe Consumer Survey



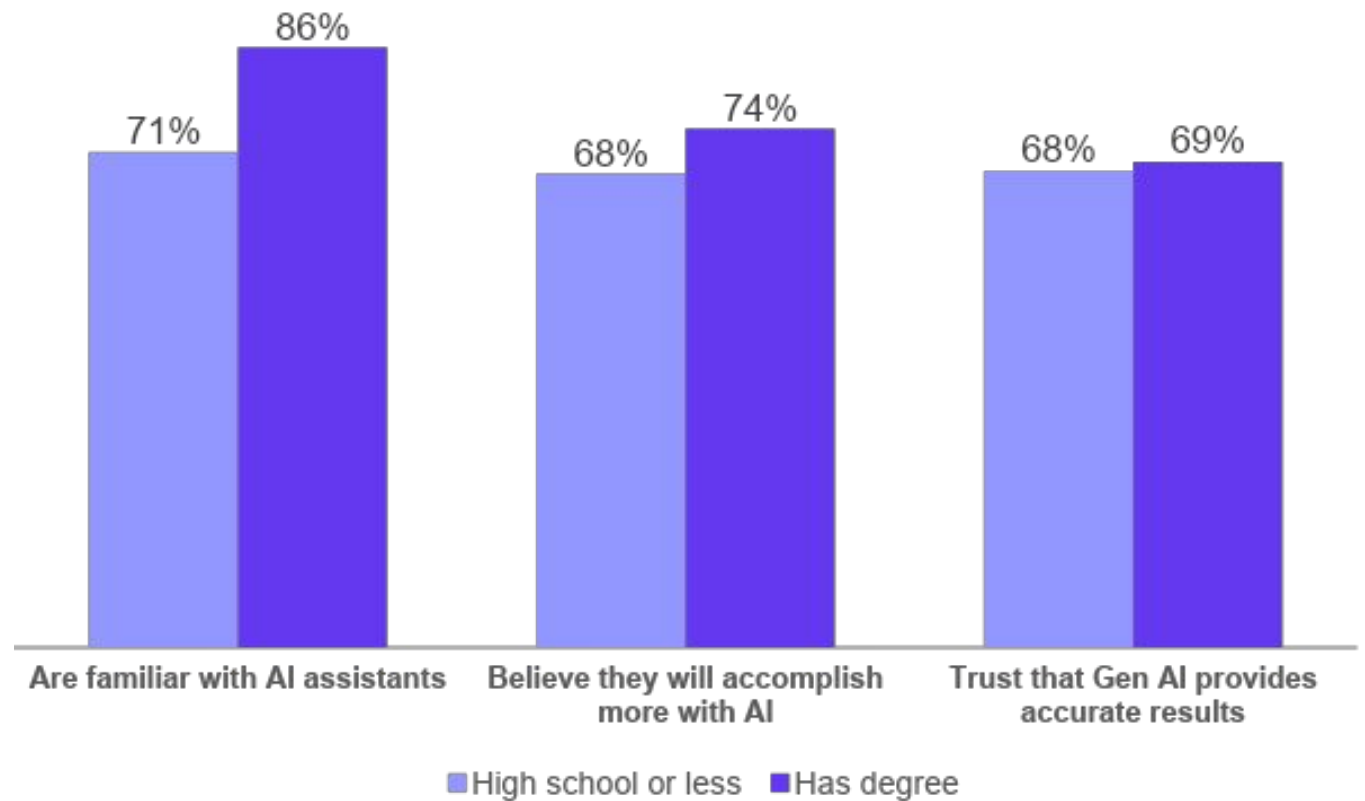
Gen Z and Millennials Set the Pace for AI-Powered Commerce

- Younger consumers, especially Gen Z and Millennials, are **more likely to use AI assistants across the full shopping journey**, from discovery to post-purchase.
- Confidence in AI-driven purchase decisions is **consistently high across generations, but drops slightly among older cohorts**, indicating trust gaps.
- AI's impact on reducing returns is **strongest among younger shoppers**, suggesting more effective decision-making with AI support.



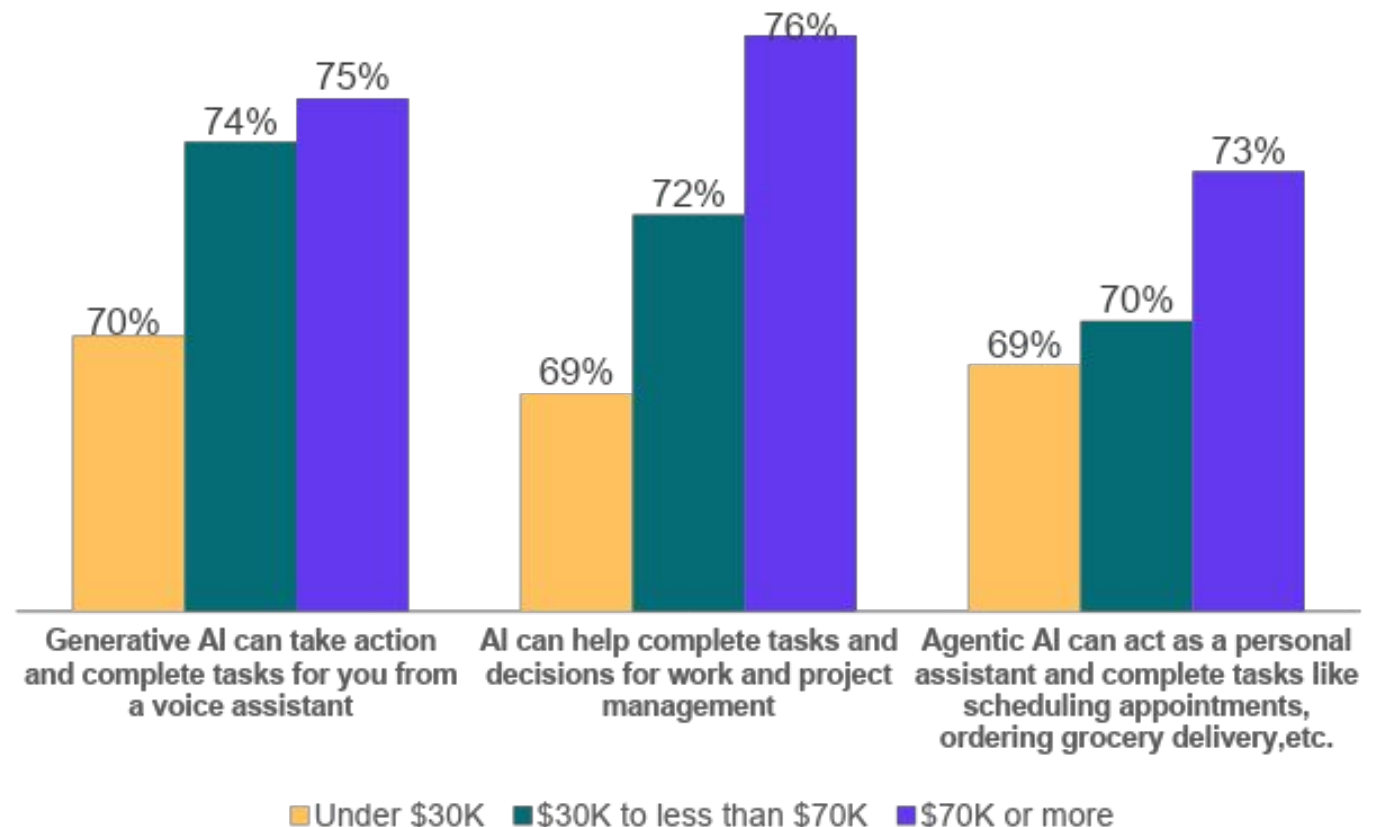
Higher Education Deepens AI Understanding Beyond Trust

- Respondents with a degree are far more likely to say they are familiar with AI assistants and that they will achieve more with it than respondents who stopped at high school.
- However, belief in the accuracy of GenAI outputs is nearly identical across education levels (68% vs. 69%), highlighting a gap in familiarity and understanding what you can do with the tool rather than a distrust in it.



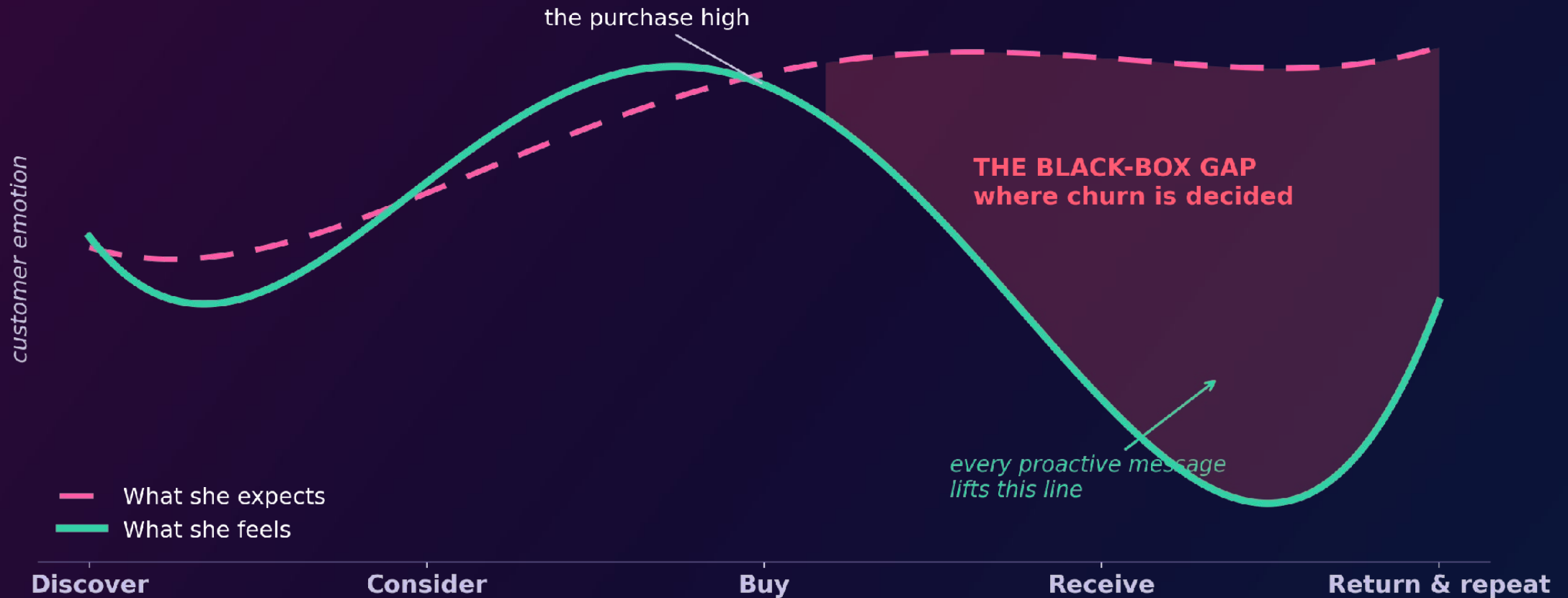
Higher-Income Consumers Lead in Confidence Across Agentic Use Cases

- Higher-income consumers (\$70K+) show **stronger confidence in AI across advanced use cases**, including task automation and personal assistant capabilities.
- Adoption follows a clear gradient: **confidence increases with income**, with lower-income groups consistently trailing.
- The gap is most pronounced in **agentic AI use cases (i.e., automation, personal assistants)**, indicating higher readiness among affluent consumers.

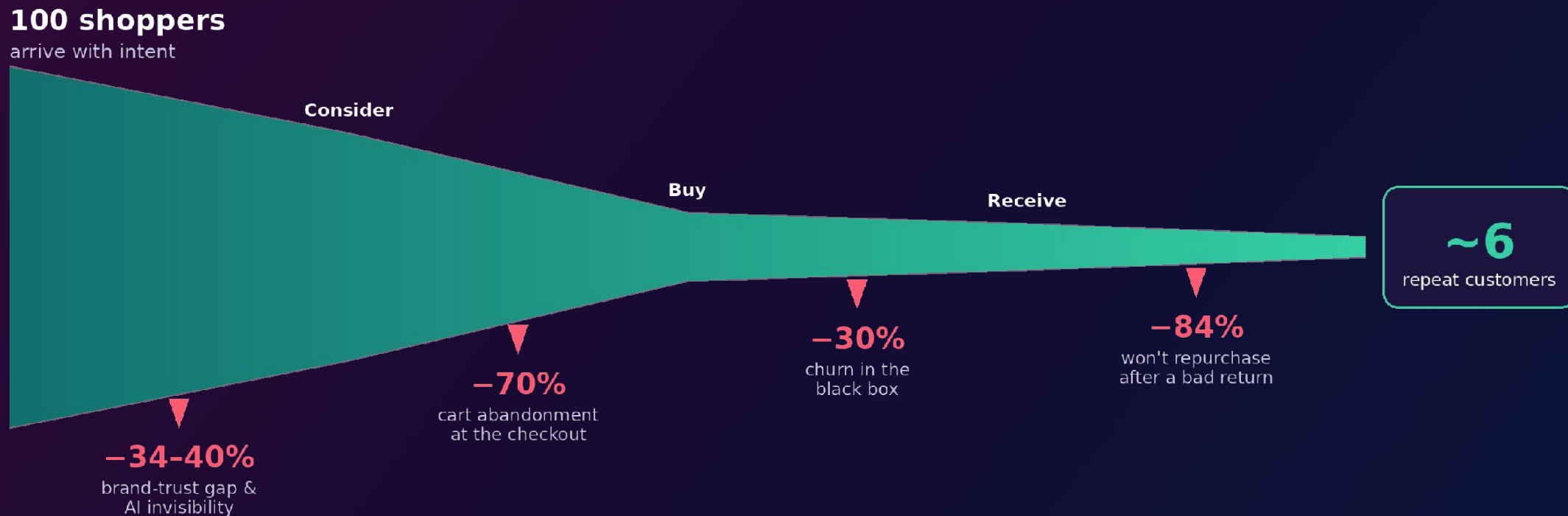


WHAT THE CUSTOMER FEELS

Your delivery data draws this curve



Cost center → conversion engine



Four stops. At each one: **the leak** → **the lever** → **the number**.

Illustrative funnel — independent stage benchmarks (Baymard; Eye on Last Mile; Narvar) compounded for effect; your mix will differ.

If they can't see the promise, they don't get to the cart

THE LEAK

~70%

abandon when delivery transparency is missing on the PDP — availability, cost, a date. And in AI search: no structured promise = not in the answer at all.

THE LEVER — yours

- Real EDD & availability on PDP / PLP
- Delivery promise in structured data (schema / feeds)
- Serviceability check before the cart

THE NUMBER

+42%

conversion premium of AI-referred shoppers — but only for retailers who are IN the answer (Adobe, Mar 2026).



Moves on your P&L: **qualified traffic · PDP→cart conversion**

Sources: Baymard Institute PDP & checkout research; Adobe Digital Insights (Mar–Apr 2026).

The most expensive four minutes in retail

THE LEAK

70%

average cart abandonment. #1 reason among real buyers: extra costs revealed too late (48%). Limited delivery options & no slots drive 8–12% on their own.

THE LEVER — yours

- Delivery choice: slots, PUDO, green options
- Full landed cost upfront — no surprises
- “Order by” cutoffs that create urgency honestly

THE NUMBER

61%

of consumers will pay more for a faster or chosen delivery slot. Fixing solvable checkout issues alone ≈ 35% conversion upside (Baymard: \$260B recoverable, US+EU).



Moves on your P&L: **cart completion · AOV**

Sources: Baymard Institute cart-abandonment meta-analysis (2026); Eye on Last Mile (FarEye).

Where the brand goes silent at the loudest moment

THE LEAK

30%

of customer churn traces to missed / inaccurate ETAs, no proactive communication, and no way to reschedule. The anxiety window is the brand moment.

THE LEVER — yours

- ETAs customers can plan a day around
- Proactive “it's running late” comms
- Self-serve reschedule / redirect

THE NUMBER

1 = 5

one failed delivery ≈ five angry support contacts. First-attempt success is the single biggest cost-to-serve lever in big & bulky.



Moves on your P&L: **cost-to-serve** • **WISMO contacts** • **repeat rate**

Sources: Eye on Last Mile / Webloyalty consumer research; industry cost-to-serve benchmarks — as presented at LML 2025.

Loyalty is decided after the doorstep

THE LEAK

84%

won't buy from you again after a bad returns experience — and returns are growing faster than sales in most categories.

THE LEVER — yours

- Frictionless returns & collections
- Instant / fast refunds
- Transparent repair & replacement journeys

THE NUMBER

4–5x

repeat-purchase multiplier documented where post-purchase is frictionless (one-click returns + instant refund credits).



Moves on your P&L: **repeat rate** • LTV • **returns cost**

Sources: Narvar returns research; Zappos annual report (as presented at LML 2025).

Where does the next CX dollar go?

cost & effort to deliver →

customer value & loyalty ↑

WIN NOW — do first

- Accurate delivery date on the PDP
- Agent-readable delivery promise & availability
- Proactive “running late” alerts
- Self-serve reschedule / redirect

INVEST DELIBERATELY — build the case

- Time-slot / appointment windows
- First-attempt success > 95%
- White-glove install, unpack & removal
- Frictionless returns + instant refunds

HYGIENE — don't break it

- “Order shipped” email
- Basic order-status page
- Standard intact packaging

THEATRE — cut or rethink

- Sub-hour speed nobody asked for
- Live GPS dot for unattended parcels
- “Premium” tiers no one selects
- Notification spam

Placements shift by category — a live map is theatre for a parcel, WIN-NOW for an attended B&B delivery. Argue with me. That's the point.

Customers don't reward speed. They reward certainty.

What retailers over-invest in

- Raw speed — same-day everywhere
- Premium delivery tiers
- More notifications

> 95% of consumers prefer free standard shipping over paying for faster.

What customers actually reward

- Certainty — a date they can plan around
- Control — choose it, change it
- Painless returns

90% will walk away when the delivery cost feels too high — certainty and transparency beat speed.

The doorstep is the brand moment, and the promise is the product.

Sources: McKinsey consumer delivery research; Baymard Institute (2026).