Popularity today, market share tomorrow

What does it take to get ahead – and stay there?

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EY Parthenon

Shape the future with confidence

Introduction

In today's increasingly competitive retail landscape, understanding how consumers perceive brands can provide valuable insight into market performance. Success often depends on understanding who is winning, who is losing and, most importantly, why.

The EY Retail Performance Index has been tracking retailer satisfaction scores since 2021, surveying over 10,000 consumers every year across more than 200 retailers, spanning 11 categories. It provides a granular view of retailer perception across 15 different elements of customer experience, as well as the overall positioning vs. competitors. Year on year, the findings tell a consistent story: retailers at the top of the EY Retail Performance Index are frequently among the sector's future leaders.

UK retail is on a bounce back, with sentiment improving across the board

The good news for retailers is that the overall outlook has improved considerably: consumers are scoring retailers more favourably now than a few years ago. In fact, scores have improved at the top and bottom of nearly every category. Customers' experience is improving and they feel that their needs are being better met by retailers.

But which categories are leading the charge and which are trailing behind?

UK RPI Retail category ranking by median, 2026:

Rank	Category	Median score 2026	Rank change from 2023	Median change from 2023
1	Baby, Kids & Toys	64.4	+2	+ 1.8
2	Health, Beauty & Wellness	64.2	-	+ 1.2
3	Accessories	62.9	-2	-2.1
4	Sports & Outdoors	62.5	-	+ 2.0
5	Electronics	61.0	-	+ 0.8
6	Footwear	60.9	-	+ 0.7
7	Home & Garden	59.9	-	+ 1.3
8	Convenience Food Service	58.7	+1	+ 0.5
9	Clothing	58.5	+2	+ 1.1
10	Books, Crafts & Stationers	57.9	-	+ 0.3
11	Grocery	57.8	-3	- 0.4

At the top, **Baby, Kids & Toys** demonstrates the enduring strength of emotionally driven spending. This category outperforms all others across multiple measures; it also recorded some of the most significant improvements since 2023. Even during periods of economic pressure, spending linked to children often proves resilient.

Health, Beauty & Wellness and **Sports & Outdoors** continue to benefit from powerful cultural and societal tailwinds. The health and wellness trend is not going away; it has become one of the defining consumer priorities of the past decade. Consumers are increasingly investing in products and experiences that support their physical health, mental wellbeing and long-term quality of life.

Grocery and **Clothing** don't have the benefit of positive tailwinds. They are essential to daily life, but under the pressures of the cost-of-living crisis, consumers have become less generous with their ratings. In **Grocery** especially, high shopping frequency and therefore exposure to inflation-linked price rises has driven a perception stagnation. Within the category the gap between leaders and laggards has widened, suggesting increasing winners and losers.

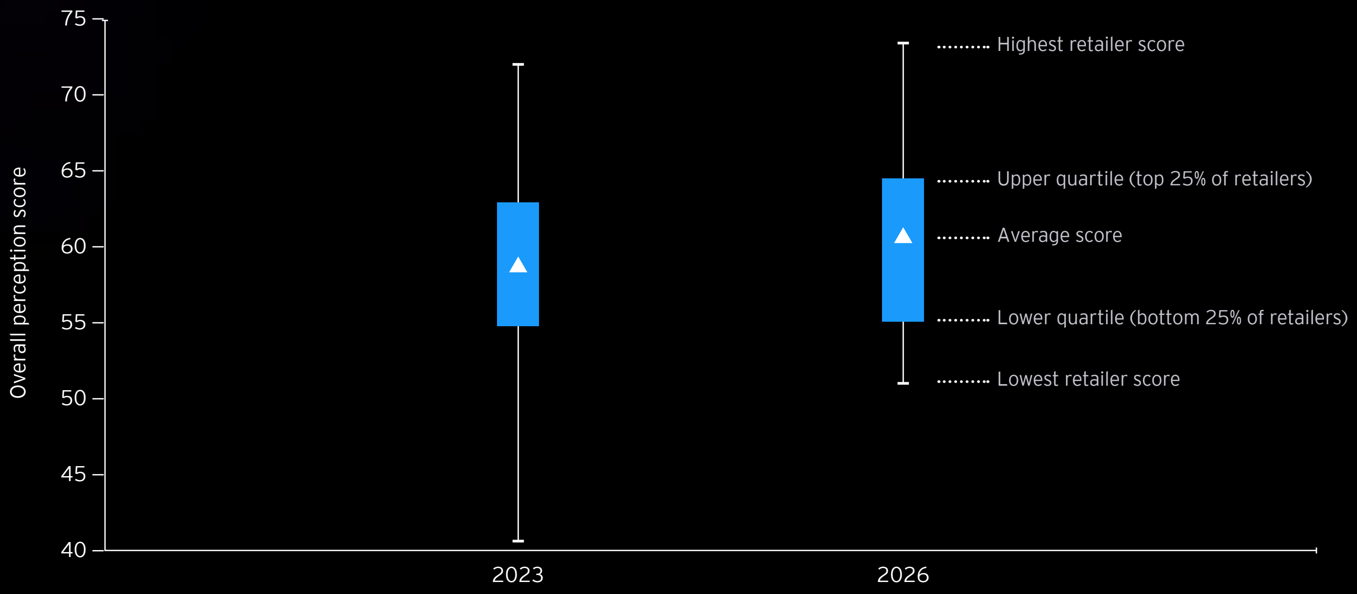
The new challenge: staying ahead of rising expectations

It has never been sufficient to keep pace with the crowd, but this year's results show this is more difficult now than perhaps it ever has been. The bottom and top ends of category perceptions are improving, but the median performance has remained relatively stable. In other words, what was considered innovative two years ago has quickly become standard practice (e.g. seamless digital and in-store experiences).

Those retailers increasingly squeezed in the middle are, in effect, running hard up a downwards escalator while yesterday's laggards close the gap and the standout leaders push further ahead. The Home & Garden category is a good example of this; the very bottom have improved the most; the top scorers have maintained their position, while the middle 50% are increasingly spread as retailers scramble to find differentiation in a crowded market.

Distribution of retailer perception score in the Home & Garden category, 2023 vs. 2026

Retailer perception scores across the category, from the lowest- to highest-scoring retailers.



Source: EY-Parthenon Retail Performance Index 2026.

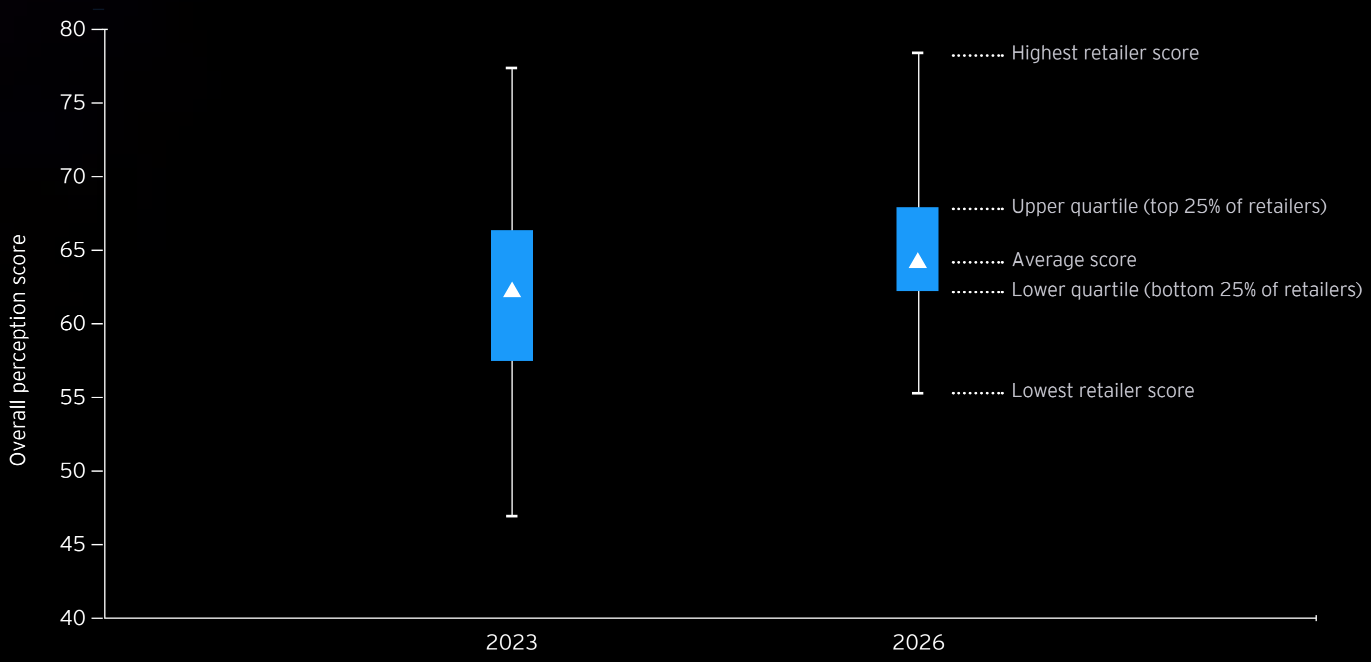
How is your category moving and how can you compete?

Baby, Kids & Toys

Baby, Kids & Toys has risen to the top of the rankings over the last three years and stands out in 2026 with the highest top score, highest low score and highest median score. Emotional categories are proving the most resilient as consumers take comfort in what's close to them and invest in the future. Lower-performing retailers have made significant gains in value for money and digital experience, while value perceptions have become more tightly clustered across the category. As value and digital experience become less differentiated, how can retailers create new points of distinction while maintaining strong category-wide performance?

Distribution of Baby, Kids & Toys category perception scores, 2023 vs. 2026:

Based on 27 retailers in the category



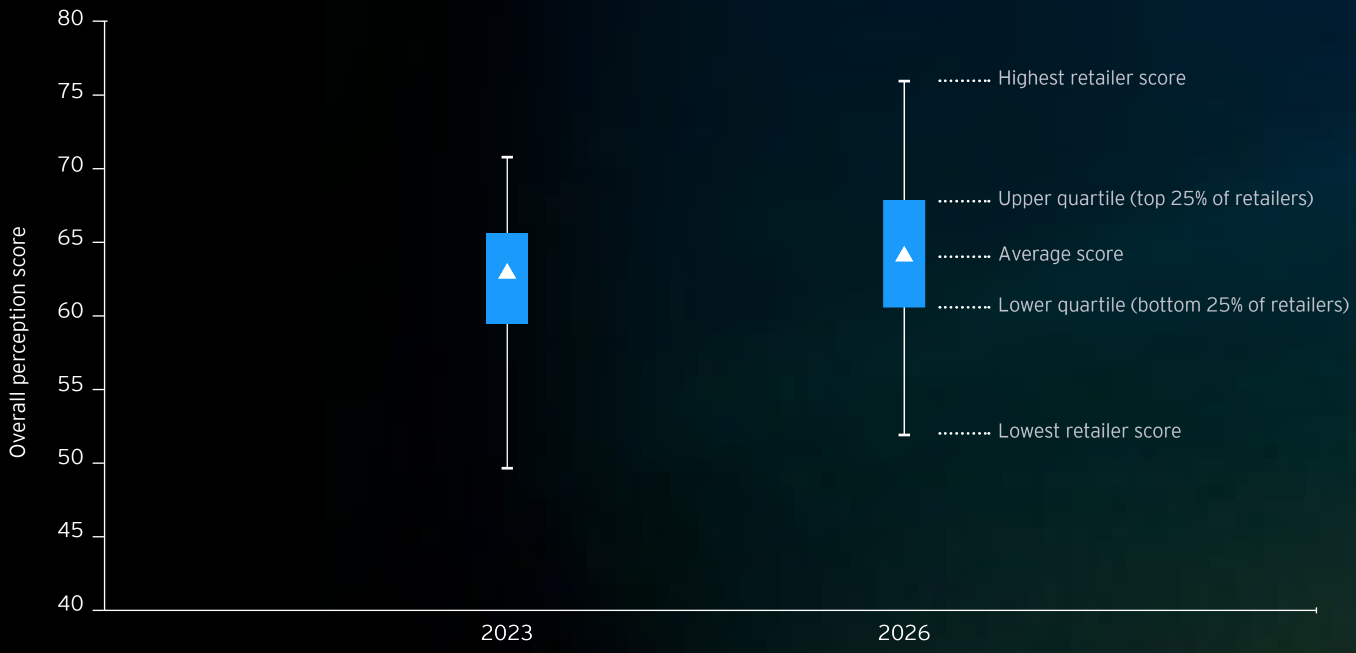
Source: EY-Parthenon Retail Performance Index 2026.

Health, Beauty & Wellness

Health, Beauty & Wellness is a high-scoring category, with perceptions improving across the top, middle and bottom of the rankings since 2023, indicative of the strong tailwinds in this category and increasing prominence in the lives of consumers. All experience dimensions are rising uniformly, while value for money perceptions have narrowed across the category (likely linked to trend to premiumisation). If performance is improving consistently across all ratings, where can retailers develop a more distinctive proposition to stand out from competitors?

Distribution of Health, Beauty & Wellness category perception scores, 2023 vs. 2026:

Based on 35 retailers in the category



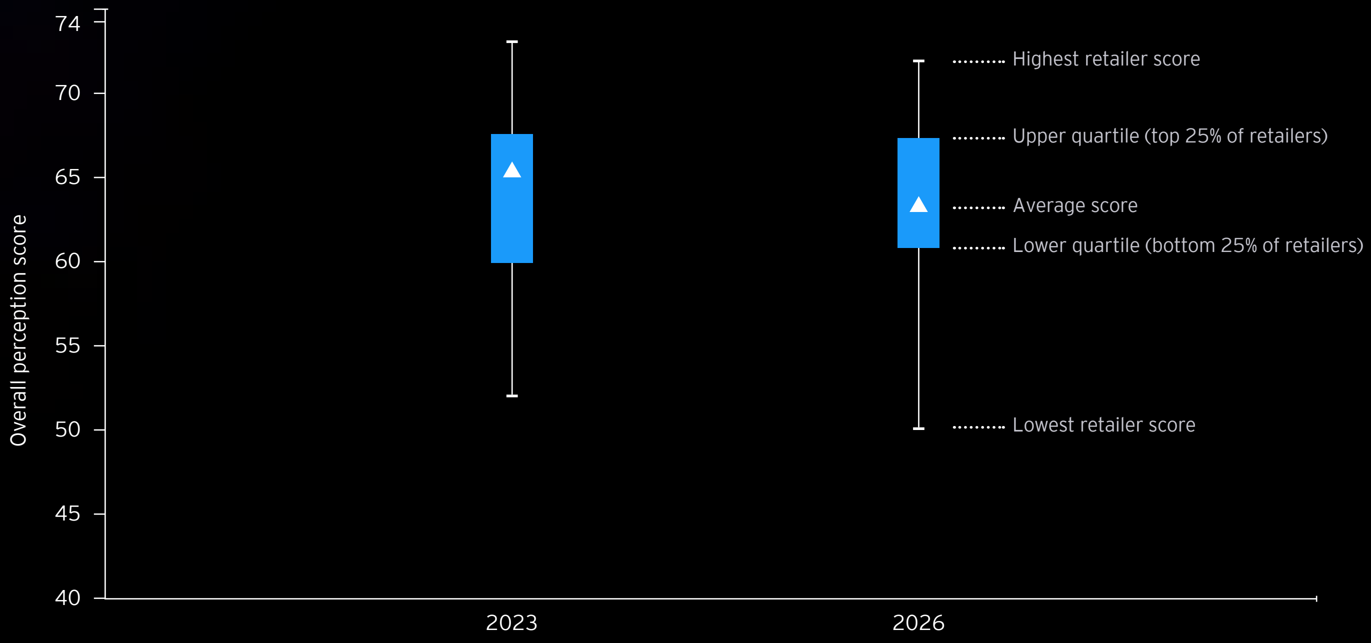
Source: EY-Parthenon Retail Performance Index 2026.

Accessories

Despite remaining a high-scoring discretionary category, **Accessories** has seen an overall decline in perception since 2023. While there is some evidence of winners at the top of category, as cost-of-living pressures continue, this is one category where consumers may be reducing spend. Choice has experienced the most notable decline, while perceptions of value for money, in-store experience and digital experience have become increasingly similar across retailers. How can retailers reinvigorate perceptions of choice and channel experience in a category where customer spending is under pressure?

Distribution of Accessories category perception scores, 2023 vs. 2026:

Based on 12 retailers in the category

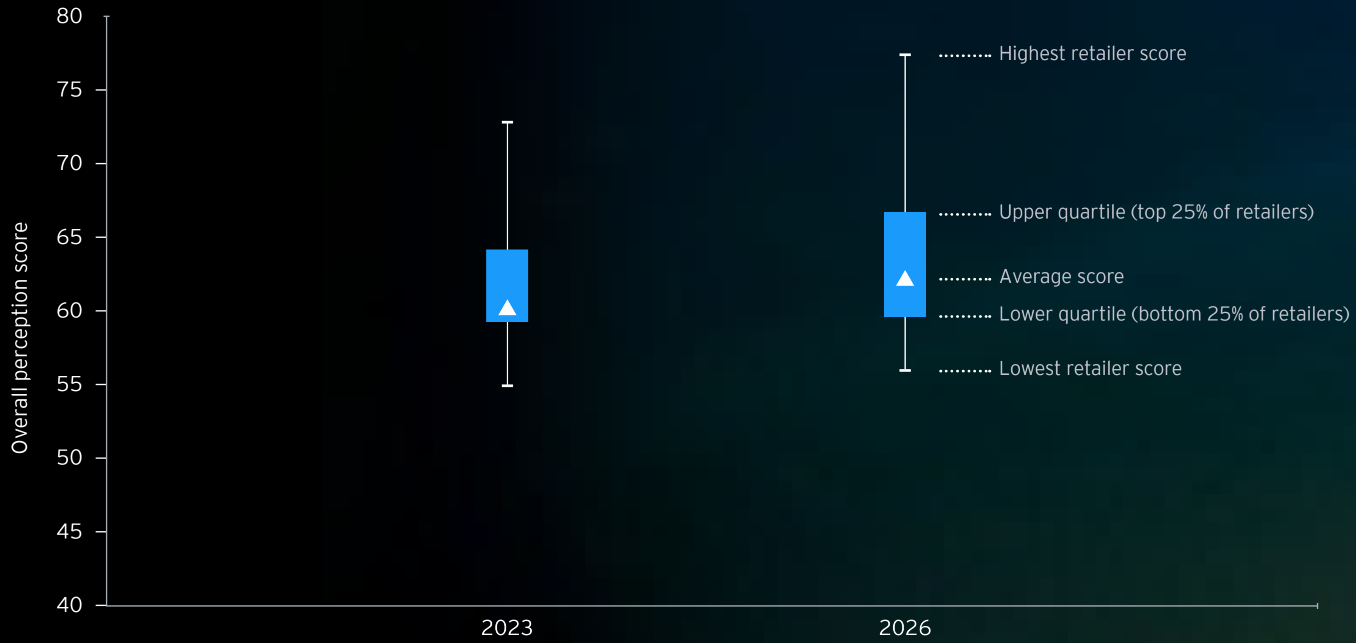


Source: EY-Parthenon Retail Performance Index 2026.

Sports & Outdoors

Sports & Outdoors has seen improvements in scores since 2023 across both the highest- and lowest-performing retailers. Digital experience has emerged as the primary battleground, with retailers not only improving their performance but also creating greater separation from competitors. Other factors have improved steadily but incrementally, indicating a category that continues to meet evolving customer expectations without fundamentally raising the bar. How can retailers continue to build advantage through digital experience as well as creating high impact physical shopping experience that is so critical to shopper product exploration?

Distribution of Sports & Outdoors category perception scores, 2023 vs. 2026:



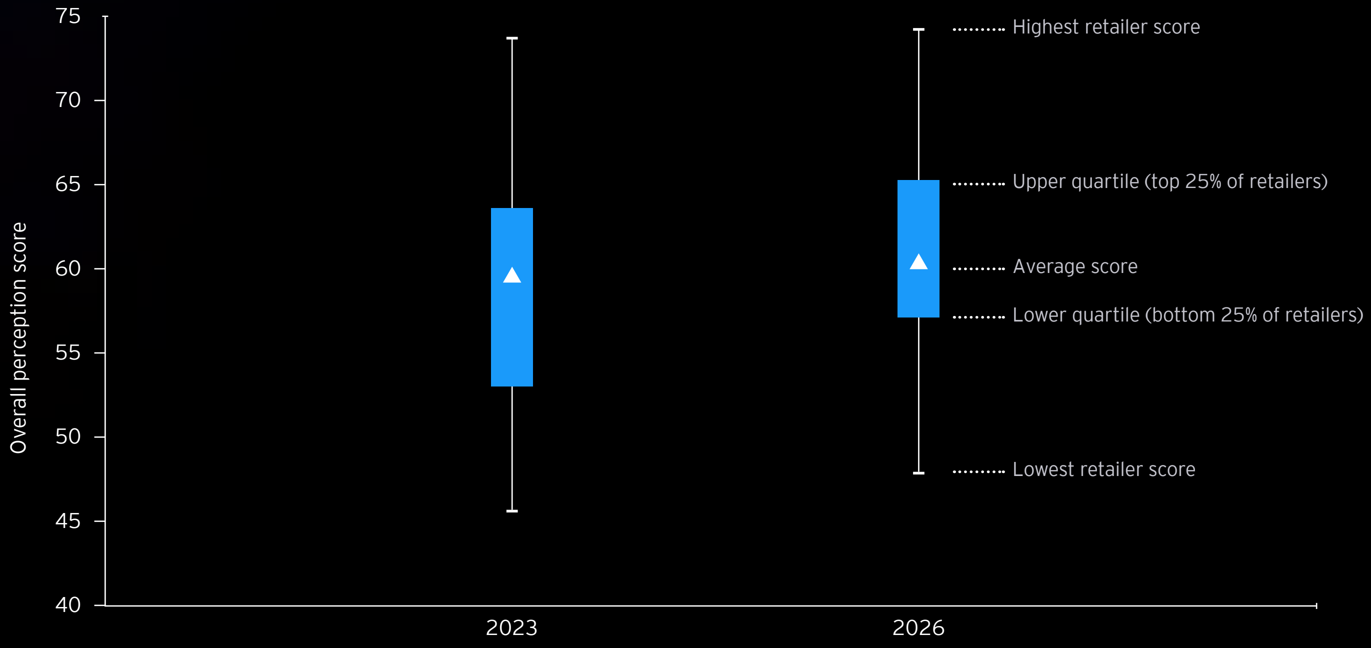
Source: EY-Parthenon Retail Performance Index 2026.

Electronics

Perception scores in **Electronics** have become more tightly clustered, suggesting reduced differentiation between mainstream retailers as this discretionary category shows its sensitivity to the economic climate. The narrowing spread is being driven particularly by converging perceptions of both in-store and online experiences. How will retailers deliver differentiation of format proposition by customer mission to seize the advantage in this category?

Distribution of Electronics category perception scores, 2023 vs. 2026:

Based on 24 retailers in the category



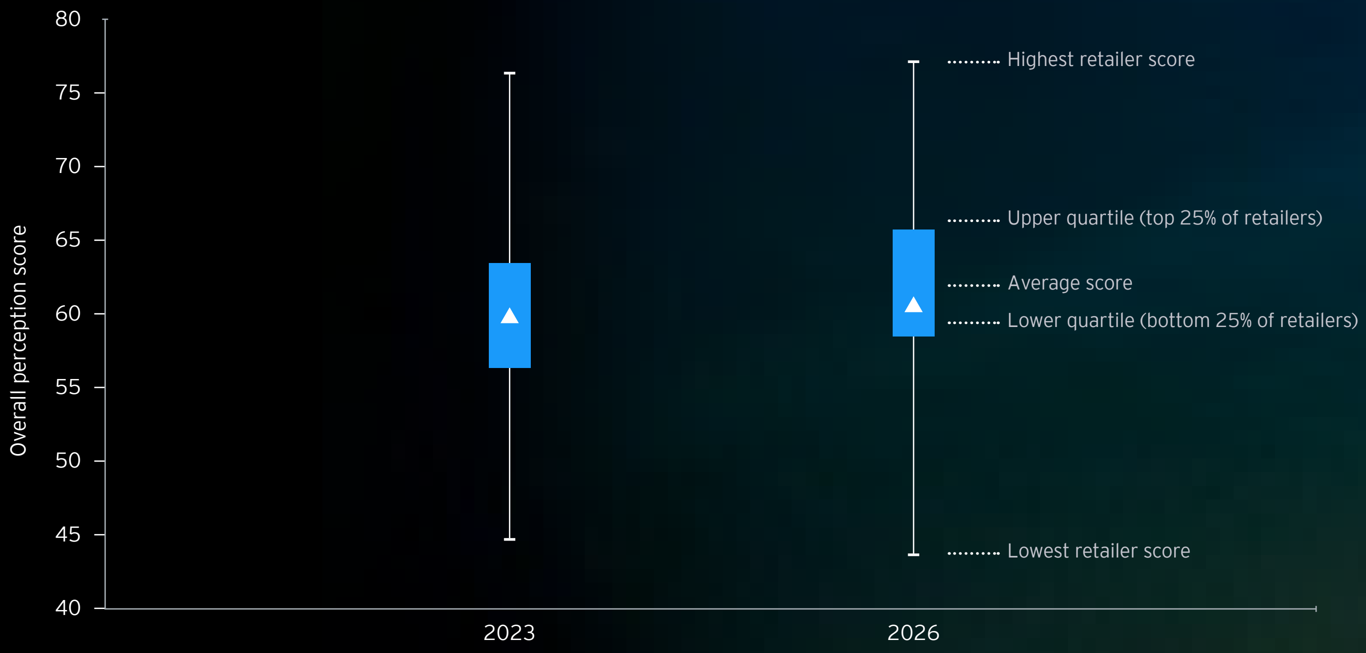
Source: EY-Parthenon Retail Performance Index 2026.

Footwear

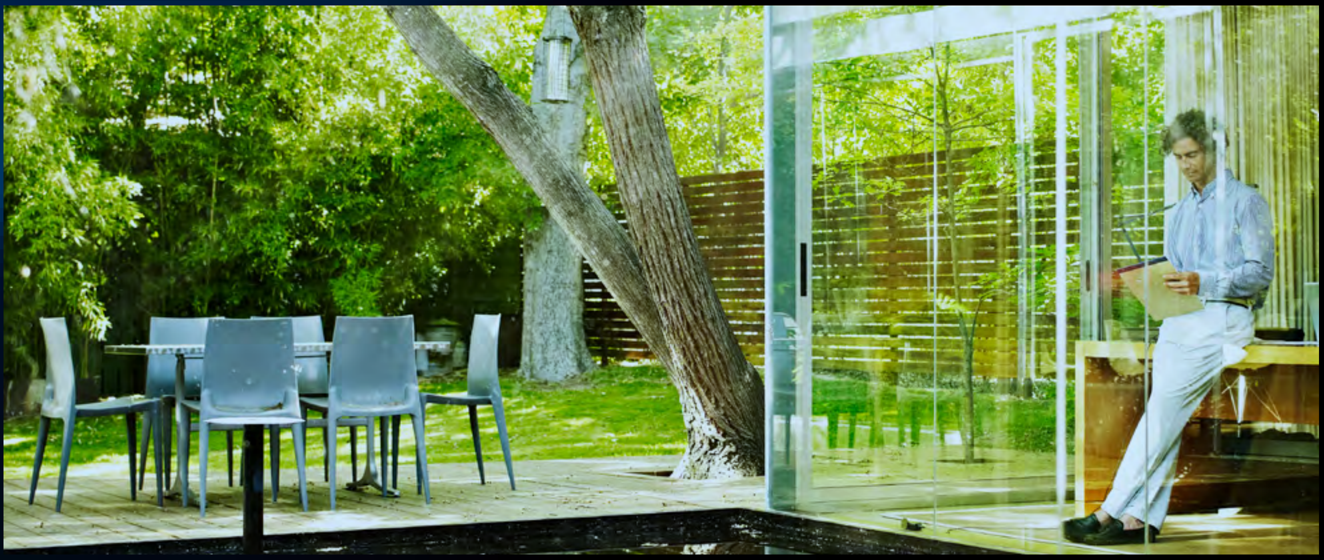
The **Footwear** category has delivered a strong performance since 2023, with customer satisfaction improving across value, choice, digital and in-store experience. Although a handful of retailers have struggled to keep pace with the market, resulting in tail of underperformers, improvements have been observed across value, choice, digital experience and in-store experience. Rising scores indicate that improvements have been felt across much of the sector, but how can retailers maintain momentum and ensure weaker performers keep pace with the broader category improvement?

Distribution of Footwear category perception scores, 2023 vs. 2026:

Based on 24 retailers in the category



Source: EY-Parthenon Retail Performance Index 2026.

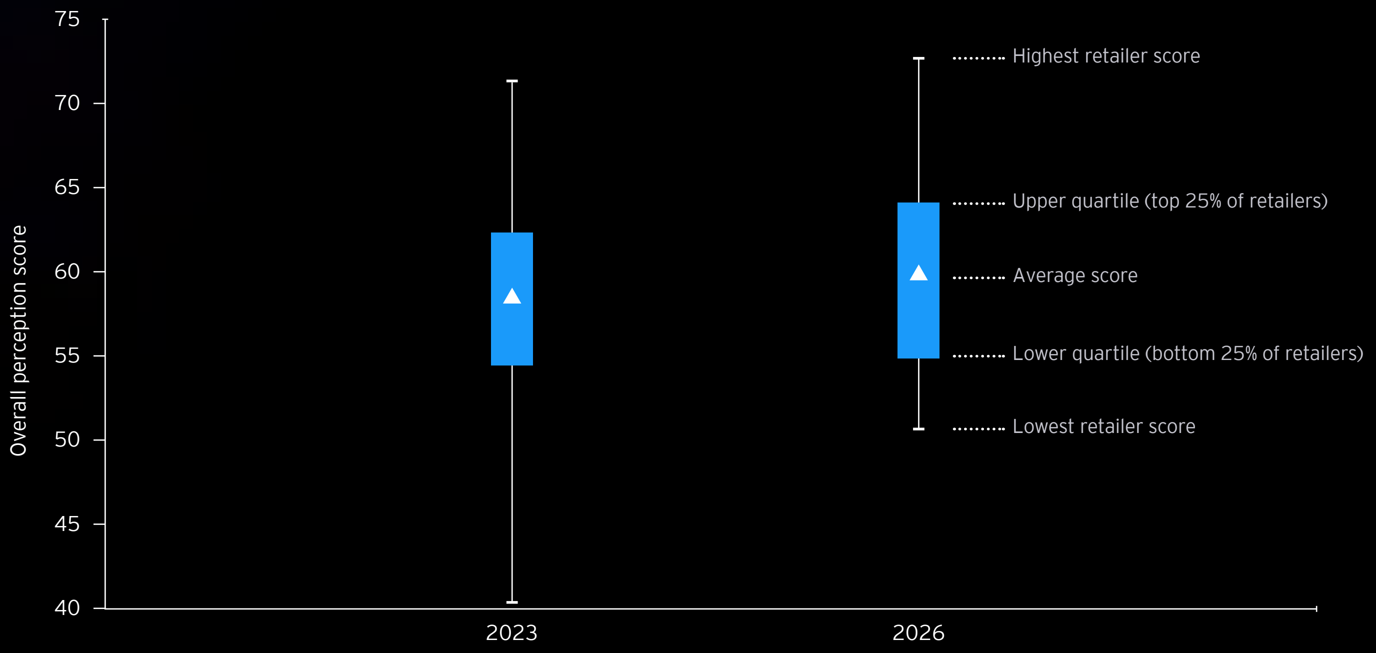


Home & Garden

Home & Garden has remained relatively stable since 2023, with no major leaders breaking away and no retailers falling significantly behind. This discretionary category has kept pace with, rather than exceeded customer expectations. Relevant choice has shown the strongest improvement, while perceptions of in-store experience have declined. How can retailers build on gains in ranging while understanding and addressing declining perceptions of the in-store experience?

Distribution of Home & Garden category perception scores, 2023 vs. 2026:

Based on 34 retailers in the category



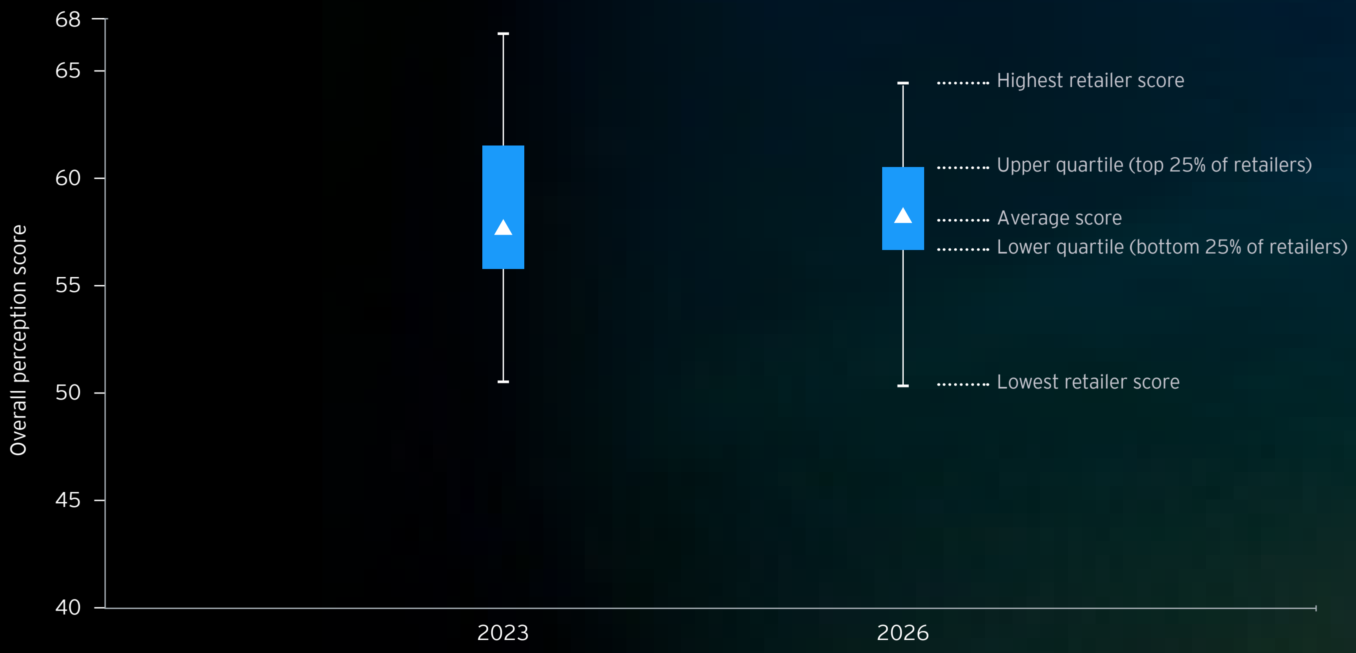
Source: EY-Parthenon Retail Performance Index 2026.

Food Service

Food Service restaurants have dropped in perception since 2023; top and bottom scores have got lower and the mainstream players have struggled to differentiate themselves, as perceptions of value converge. Consumer have, however, seen improvements in digital propositions, as retailers invest in digitally enabled experiences (in-store menu boards & app); but perceptions of choice have declined, indicating that customers may feel menus and innovation are becoming less compelling. How can retailers translate digital improvements into stronger overall customer perceptions while addressing declining views on choice?

Distribution of Food Service category perception scores, 2023 vs. 2026:

Based on 23 retailers in the category



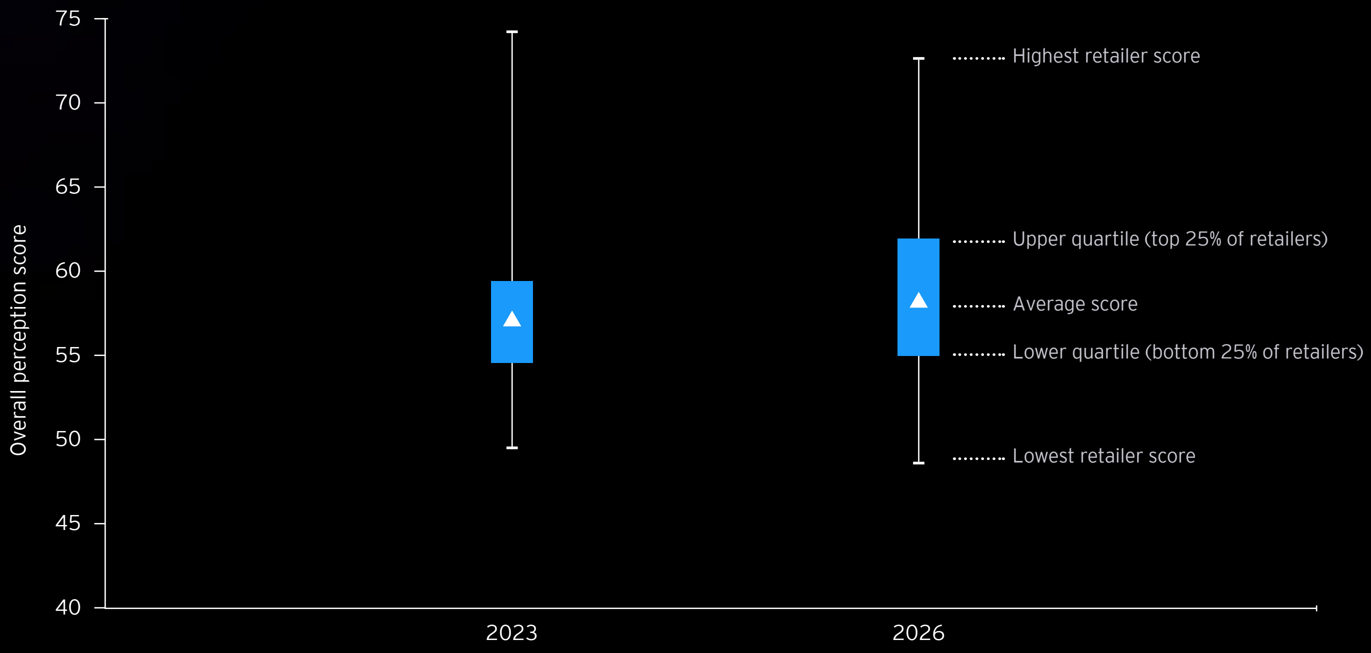
Source: EY-Parthenon Retail Performance Index 2026.

Clothing

Clothing has seen gradual but consistent improvement since 2023, alongside growing divergence in retailer performance in the middle of the market. Perceptions of value for money and choice have improved, particularly online, reflecting retailers' efforts to strengthen affordability. However, in-store experiences have lagged behind. How can retailers replicate their online success within stores to deliver a more balanced customer experience?

Distribution of Clothing category perception scores, 2023 vs. 2026:

Based on 42 retailers in the category



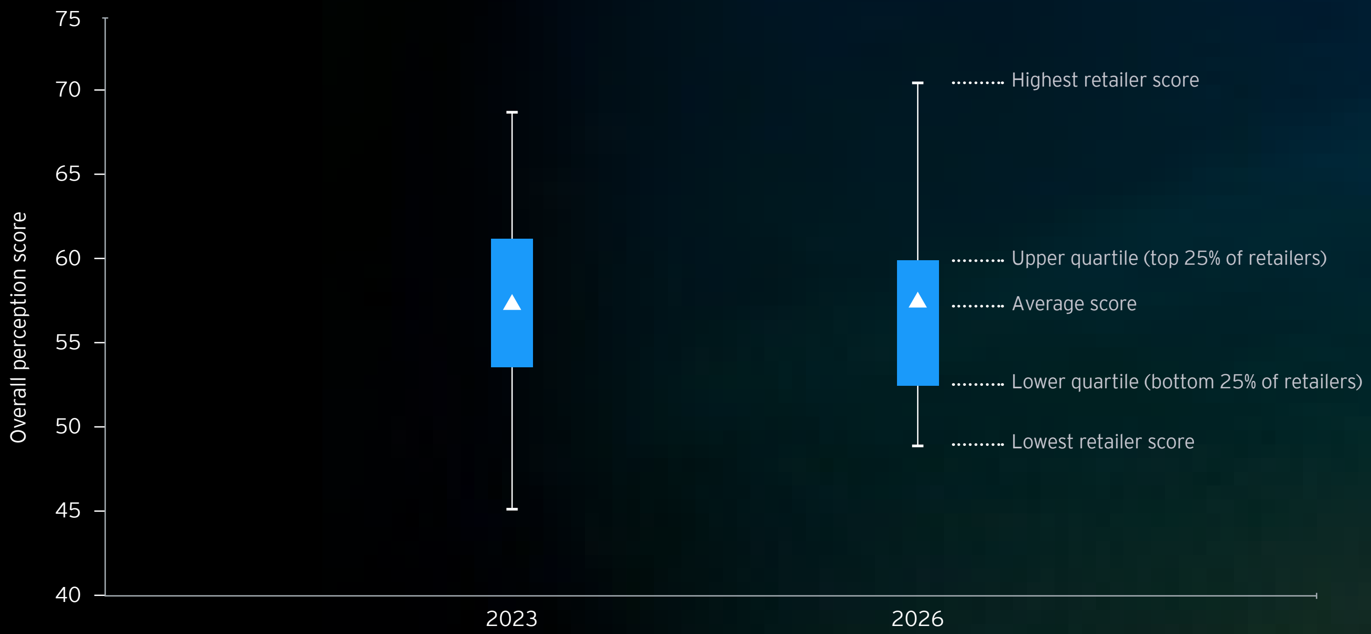
Source: EY-Parthenon Retail Performance Index 2026.

Books, Crafts & Stationers

Books, Crafts & Stationers has experienced a decline in popularity as retailers struggle to keep pace. Perceptions of value for money, choice and in-store experience have all weakened. How can retailers present a credible alternative in a category rapidly losing relevance with consumers in a digital age?

Distribution of Books, Crafts & Stationers category perception scores, 2023 vs. 2026:

Based on 15 retailers in the category



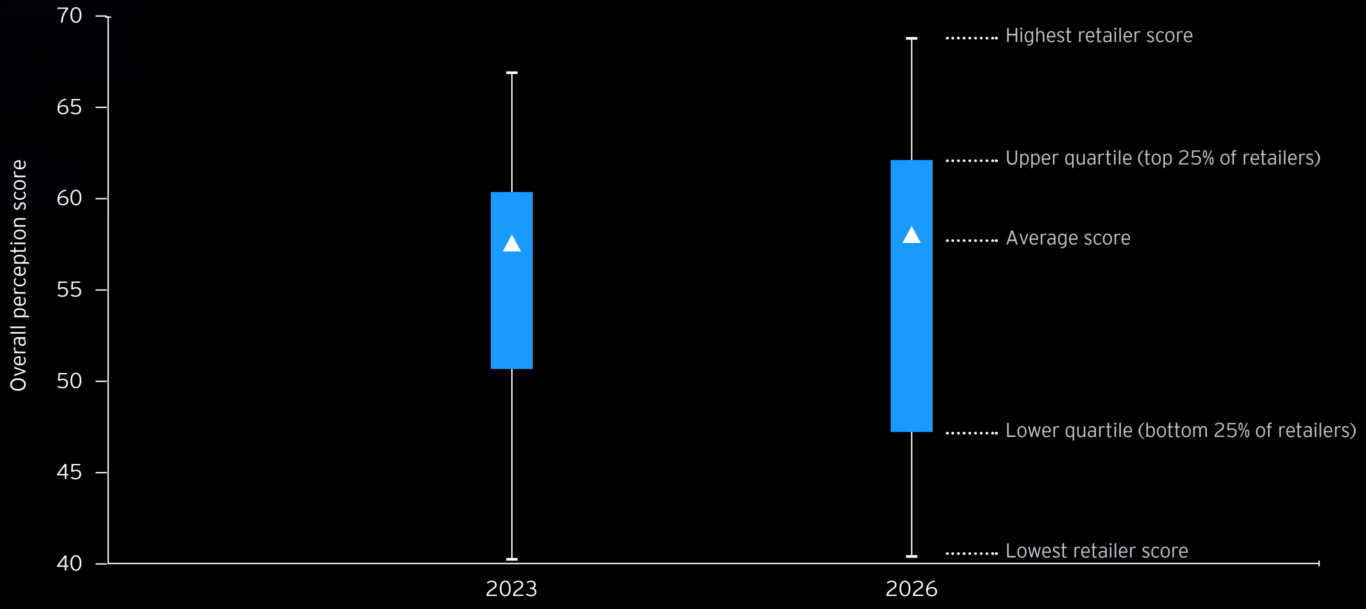
Source: EY-Parthenon Retail Performance Index 2026.

Grocery

Grocery has become more polarised, with the gap between leading and lagging retailers widening and a clearer group of market leaders emerging. The widening spread is primarily driven by increasing differences in in-store and online experience, while average in-store experience has declined and leading performers have seen slight declines in value perceptions. How can lagging retailers close the growing experience gap and protect value perceptions as competitive pressure intensifies?

Distribution of Grocery category perception scores, 2023 vs. 2026:

Based on 17 retailers in the category



Source: EY-Parthenon Retail Performance Index 2026.

Consider “Turning category insight into informed decision-making” to make less outcome orientated

For retailers, how their category is operating can provide valuable context for shaping strategic priorities. A deep understanding of performance relative to broader category evolution and competitor set can help identify opportunities for differentiation and growth.

The EY UK&I Retail Strategy team works with leadership teams to translate consumer and market insights into practical strategies. Combining research and implementation experience, we support organisations in identifying priorities and informing strategic decision-making..

Get in touch with our team to understand how your business is perceived versus your competitors and learn how our insights and experience can support retail strategy and performance initiatives..

Understanding what matters most to customers, identifying the drivers behind customer perceptions and prioritising actions accordingly can help inform strategic decision-making.

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