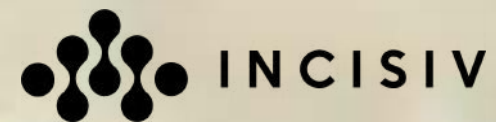




2024 Benchmark

Unified Commerce for Specialty Retail in Australia



Embracing Diverse Consumer Realities: Navigating Australia's Retail Landscape

Cultural and Demographic Nuances

Retailers in Australia must adapt to the diverse tastes and preferences across regions. Multicultural vibrancy in the big cities and demand for luxury brands contrast with laid-back, community-focused preferences in smaller towns. Success in Australian retail relies on understanding these differences and customising offerings, a cornerstone of effective Unified Commerce.

Balancing Compliance and Customer Experience

Regulations like the Australian Consumer Law (ACL) and Environmental Social and Governance (ESG) standards reflect consumer expectations for ethical, transparent business practices. Retailers must integrate these regulations into their Unified Commerce strategies without compromising customer experience, delivering personalised, efficient, and privacy-respecting shopping experiences.

Economic Factors Influencing Retail in Australia

The varied economic landscape requires adaptable retail strategies. Strong economies and high disposable income levels in large cities offer opportunities for premium products, while regional and emerging markets demand value-driven options. Retailers must align their value propositions with these economic conditions for successful Unified Commerce.



53% of Australian consumers expressed a strong preference for brands that show cultural sensitivity and also comply with regulatory requirements, underlining the importance of localisation in building trust and loyalty.

Redefining Retail Convenience: From Speed to Experience

Seamless Integration of Digital and Physical

Australian retailers are excelling at integrating digital channels with physical stores, ensuring a seamless customer journey. This integration allows customers to effortlessly switch between online browsing and in-store shopping, a fundamental aspect of Unified Commerce. By harnessing advanced technology, retailers are improving customer satisfaction and establishing themselves as leaders in the dynamic retail environment.

Convenience is a Many-Splendoured Thing

In Australia, convenience in retail goes beyond speed, emphasising customer-centric innovations. Contactless payments are widely adopted, and 'buy now, pay later' services offer flexible payment options. Retailers are improving convenience with omnichannel strategies, like same-day delivery, flexible, 24/7 customer support and personalised experiences driven by data analytics and AI.

Sustainability as a Core Element of Value-Based Retailing

Sustainability is becoming a cornerstone of value-based retailing in Australia. Consumers expect eco-friendly practices, from sourcing to logistics. Retailers committed to sustainability are aligning with the values of an environmentally conscious consumer base, gaining a competitive edge in the market by integrating green practices into their operations.



83% of Australian consumers are more likely to shop with retailers offering integrated online and in-store experiences.

Unified Commerce: Australia's Retail Evolution

Driving Strategies for Diverse Markets

In Australia, Unified Commerce is crucial for catering to the diverse consumer base. From Sydney's cosmopolitan vibe to Brisbane's relaxed atmosphere, retailers must customise their offerings. Leveraging Unified Commerce allows retailers to integrate online and offline experiences, meeting varied preferences and maintaining their brand's appeal nationwide.

Addressing the Value Divide

Australia's retail market has a clear division in consumer value perceptions. Some consumers seek sustainable or premium products from digital-native brands, while others look for value-driven deals from larger chains. Unified Commerce enables retailers to navigate this divide, offering tailored experiences for both high-end and budget-conscious customers.

Driving Innovation and Adaptation

In Australia's evolving retail sector, continuous innovation and adaptation are essential. Retailers are adopting advanced technologies like AI and IoT to enhance customer experience and streamline operations. Success requires not only adapting to broad global trends but contextualising to the unique market needs.



eCommerce sales in Australia are expected to grow at a CAGR of 4.5%, highlighting the importance of focusing on unified commerce to capture this market.

2024 Unified Commerce Benchmark for Specialty Retail

The industry's first Unified Commerce benchmark with real purchases, real returns, and **real customer journeys across digital and physical channels.**



29

**retailers benchmarked
in Australia**



290

**customer experience
capabilities tested across
4 capability areas**

Jump to a Section:

Methodology & Approach



Leaders in Unified Commerce



Search & Discovery



Cart & Checkout



Promising & Fulfilment



Service & Support



Retailers Assessed

Apparel & Footwear

Adidas
Anaconda
Cotton On
General Pants Co.
H&M
Nike
Puma
Rebel Sport
Sketchers

Home & DIY

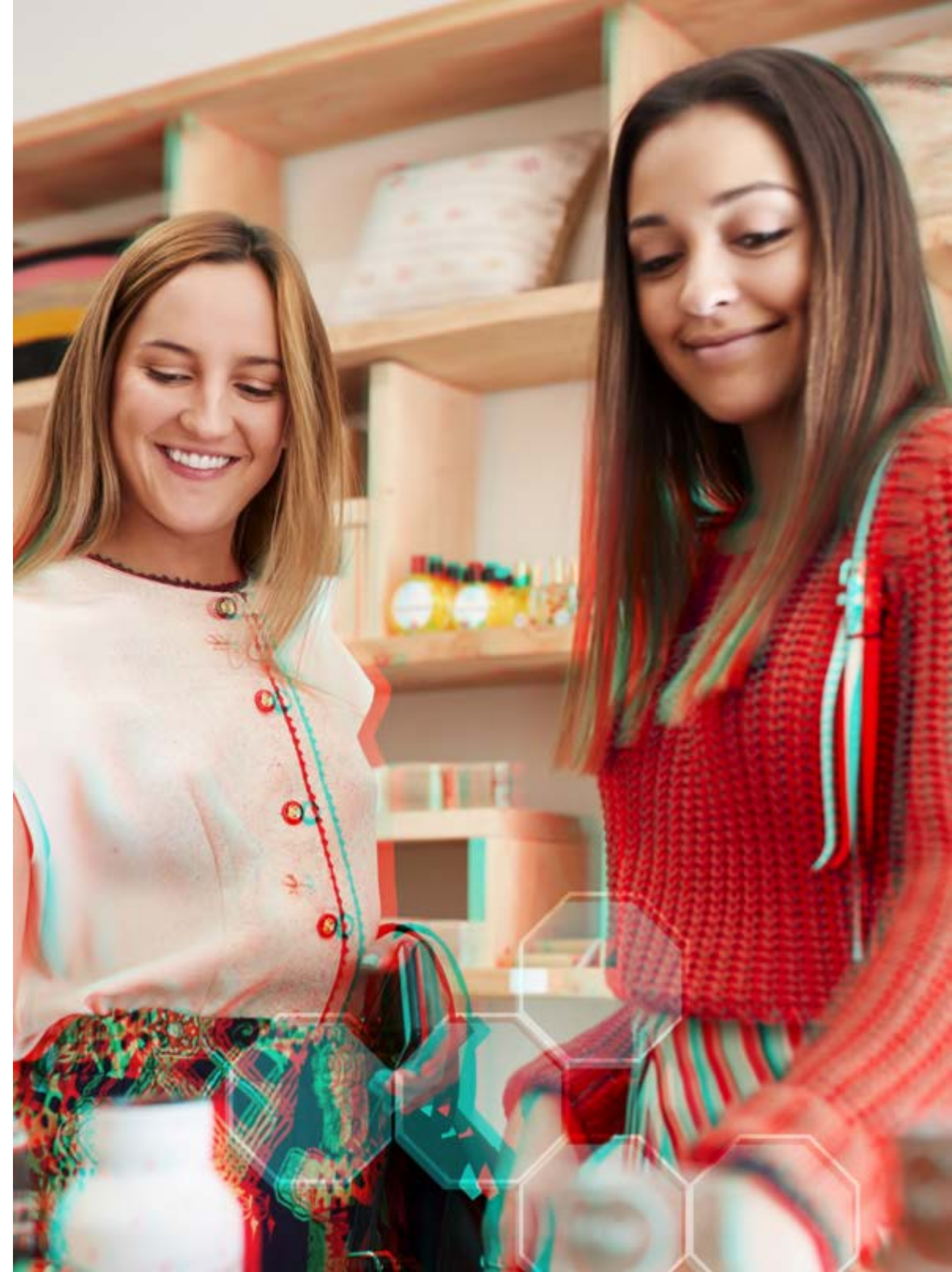
Amart
Bunnings
Domayne
Fantastic Furniture
Harvey Norman
JB Hi-Fi
Officeworks
Spotlight
The Good Guys

Department Stores

Big W
David Jones
Kmart
Myer
Target

Luxury

Burberry
Chanel
Dior
Gucci
Hermes
Prada



2024 Unified Commerce Benchmark
for Specialty Retail

Methodology & Approach



Meticulous Benchmarking Methodology



Unified Commerce Assessment Framework

Incisiv first developed a detailed parameterised list of Unified Commerce customer experience capabilities.

Then, based on shopper insights, retailer executive surveys, retailer digital and store performance data, and segment-level KPI benchmarks, we organised key capabilities into **Table Stakes** and **Differentiating Experiences**.

Unless mentioned otherwise, all data in this report is from Incisiv's in-market shopper and executive research and from aggregate data analysis of the retailers that were assessed as part of the benchmark.



Store & Digital Experience Audits

Incisiv developed an objective list of 29 retailers across 4 specialty retail segments. We chose a mix of top omnichannel retailers by revenue across Apparel & Footwear, Department Stores, Home & DIY, and Luxury. All retailers had to be in good financial health, as determined by a combination of factors, including their debt rating and rate of store closures.

Incisiv's team of customer experience analysts then conducted comprehensive shopping journeys, including **real purchases and returns**, across both digital and store channels.



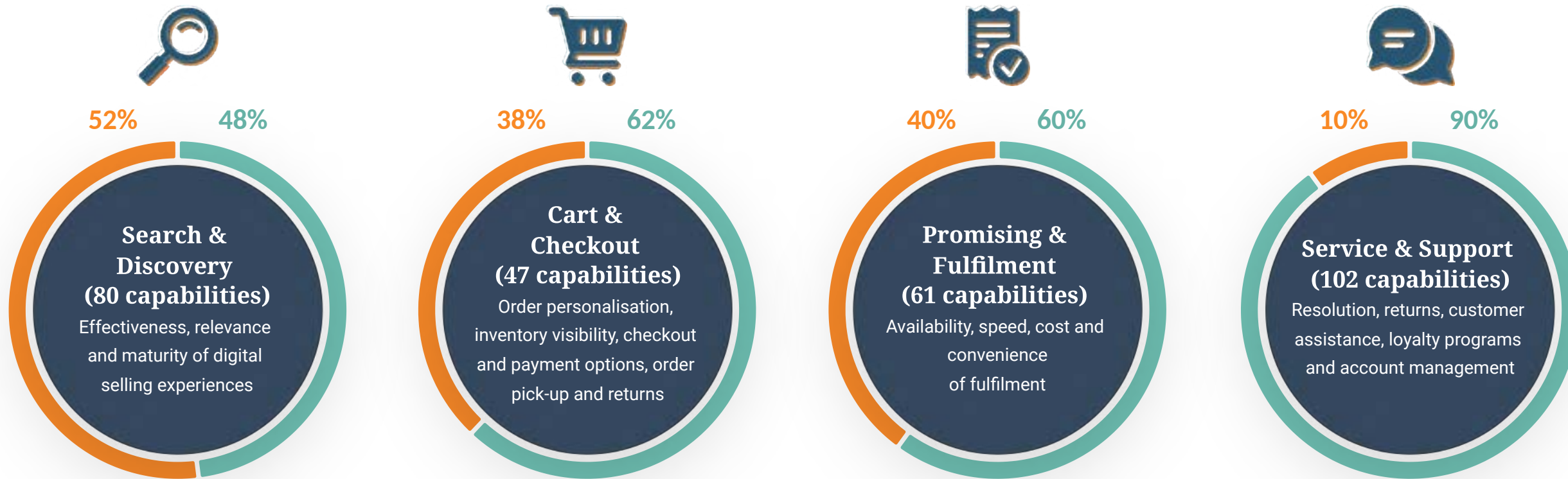
Rating Categories for Assessed Retailers

Assessed retailers were then scored based on the adoption of customer experience capabilities, the efficacy of each capability, and the consistency and the quality of experience.

Based on their score, brands were organised into one of 4 performance categories - **Leaders, Challengers, Followers, or Laggards** - each with a statistically significant difference in capability maturity and impact on performance.

Unified Commerce Assessment Framework

Incisiv's Unified Commerce Assessment Framework spans **290 customer experience capabilities** across the following four functional areas. The number of attributes assessed in each area is provided in parentheses.



DE: % Differentiating Experiences, **TS:** % Table Stakes Experiences

Capabilities are categorised as **Table Stakes** or **Differentiating Experiences** based on their impact on key performance metrics such as average order value (AOV) and conversion.

Table Stakes are foundational capabilities required to address key shopper expectations today. The absence of these capabilities has a negative impact on digital performance KPIs.

Differentiating Experiences are advanced capabilities that address important, emerging shopper expectations. The presence of these capabilities has a positive impact on digital performance KPIs.

For instance, in Search & Discovery, the ability to show store inventory online is table stakes, whereas the ability to filter search results based on available fulfilment types is a differentiating experience.

Each capability is mapped either as Table Stakes or as a Differentiating Experience. Incisiv's framework also takes into account the variance in the relative importance of a capability across various specialty retail segments.

Store & Digital Experience Audits

Incisiv developed an objective list of 29 retailers across **4 specialty retail segments**. We chose a mix of top omnichannel retailers by revenue: Apparel & Footwear (9), Department Stores (5), Home & DIY (9) and Luxury (6). All retailers had to be in good financial health, as determined by a combination of factors, including their debt rating and rate of store closures.

For each retailer included in the benchmark, Incisiv's team of customer experience analysts conducted real, in-store and digital shopping journeys, including purchases and returns. The team used the retailer's eCommerce site, visited their brick and mortar stores, including interacting with in-store staff, spoke with call centre agents, interacted with virtual agents via chat, and used the retailer's mobile app.

The benchmark assessment was conducted between March 2024 and April 2024. Customer experience analysts conducted 5 online visits at different times of day and visited 3 different stores across urban and sub-urban areas (where available).

The number of omnichannel retailers selected per segment was based on the relative penetration and market share within each segment. Omnichannel retailers were selected based on their annual revenue. The specialty retail segments covered are:

- Apparel & Footwear (9)
- Department Stores (5)
- Home & DIY (9)
- Luxury (6)

Rating Categories for Assessed Retailers



Laggards

Laggards offer a severely lacking Unified Commerce experience, missing even some basic table-stakes functionality.



Followers

Followers offer a basic Unified Commerce experience, addressing most table-stake capabilities. Their experiences lack depth and are light on the adoption of differentiated capabilities.



Challengers

Challengers offer a seamless Unified Commerce experience built on a solid foundation of capabilities. They offer some differentiated experiences but lack the depth and coverage of leaders.



Leaders

Leaders offer the richest Unified Commerce experience within and across retail segments. They lead in the adoption of differentiated experiences and are functionally mature across most assessment areas.

2024 Unified Commerce Benchmark
for Specialty Retail

Overall Leaders



Overall: Australia Leaders vs Non-Leaders

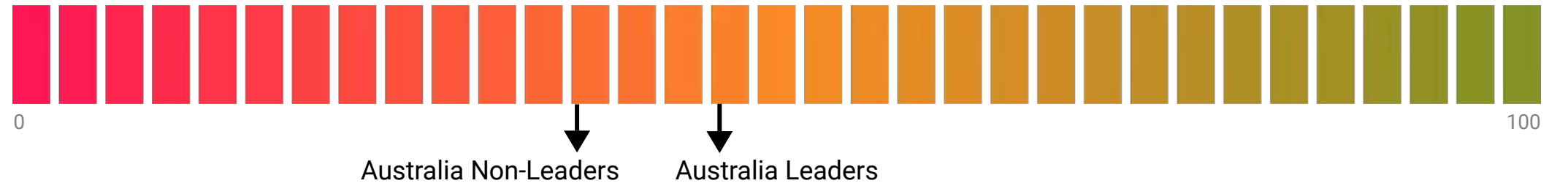
Australia Highlights:

Retailers are diligently addressing table stake capabilities such as channel integration, search, payment options, sustainability choices and fulfilment. However, they are lagging behind in adopting many high impact differentiating capabilities like personalisation, expedited fulfilment methods and comprehensive customer service.

Outlook:

Unified commerce adoption remains relatively low, even among retail leaders, with differentiating experiences adoption at only 42%. To achieve success in the future, retailers must reevaluate their strategy and maintain a strong focus on execution.

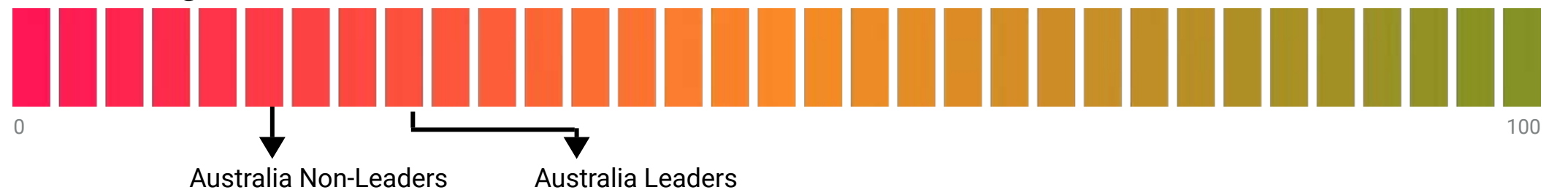
Search & Discovery



Cart & Checkout



Promising & Fulfilment



Service & Support





Overall Leaders

Incisiv recognises these 4 brands as 2024 Unified Commerce Leaders.

Retailers listed in alphabetical order.

The Bunnings logo, featuring a stylized 'B' with a red and blue gradient, followed by the word "BUNNINGS" in green. Below the logo is a dark blue rounded rectangle containing the text "Home & DIY" in white.

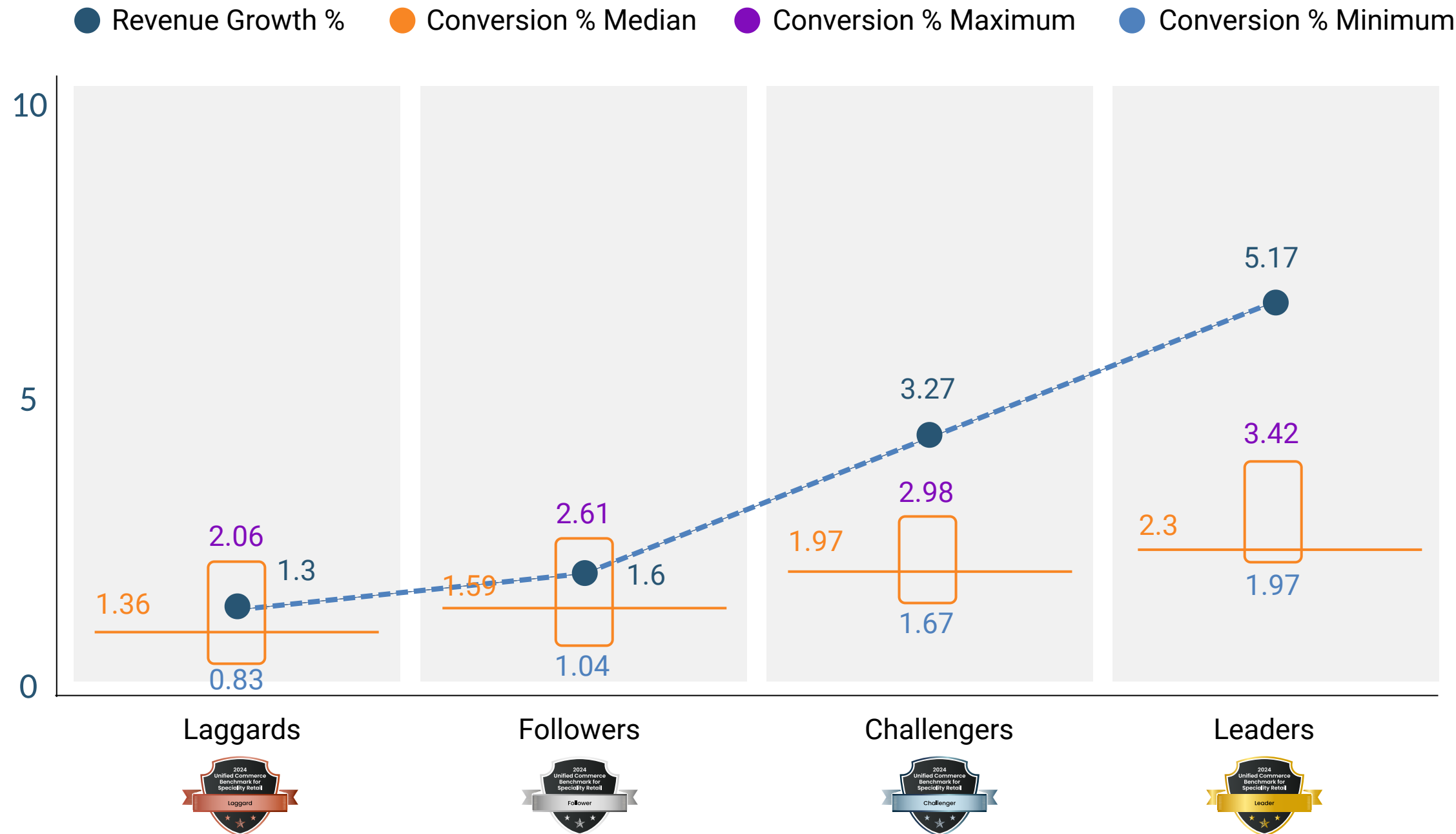
The Cotton:On logo, with "COTTON:ON" in red. Below the logo is a dark blue rounded rectangle containing the text "Apparel & Footwear" in white.

The Harvey Norman logo, with "Harvey Norman" in blue and red. Below the logo is a dark blue rounded rectangle containing the text "Home & DIY" in white.

The JB Hi-Fi logo, with "JB HI-FI" in black on a yellow background. Below the logo is a dark blue rounded rectangle containing the text "Home & DIY" in white.

Unified Commerce Leaders' revenue growth outperforms Non-Leaders 2X - 3X

Average revenue growth rate for retailers by rating category



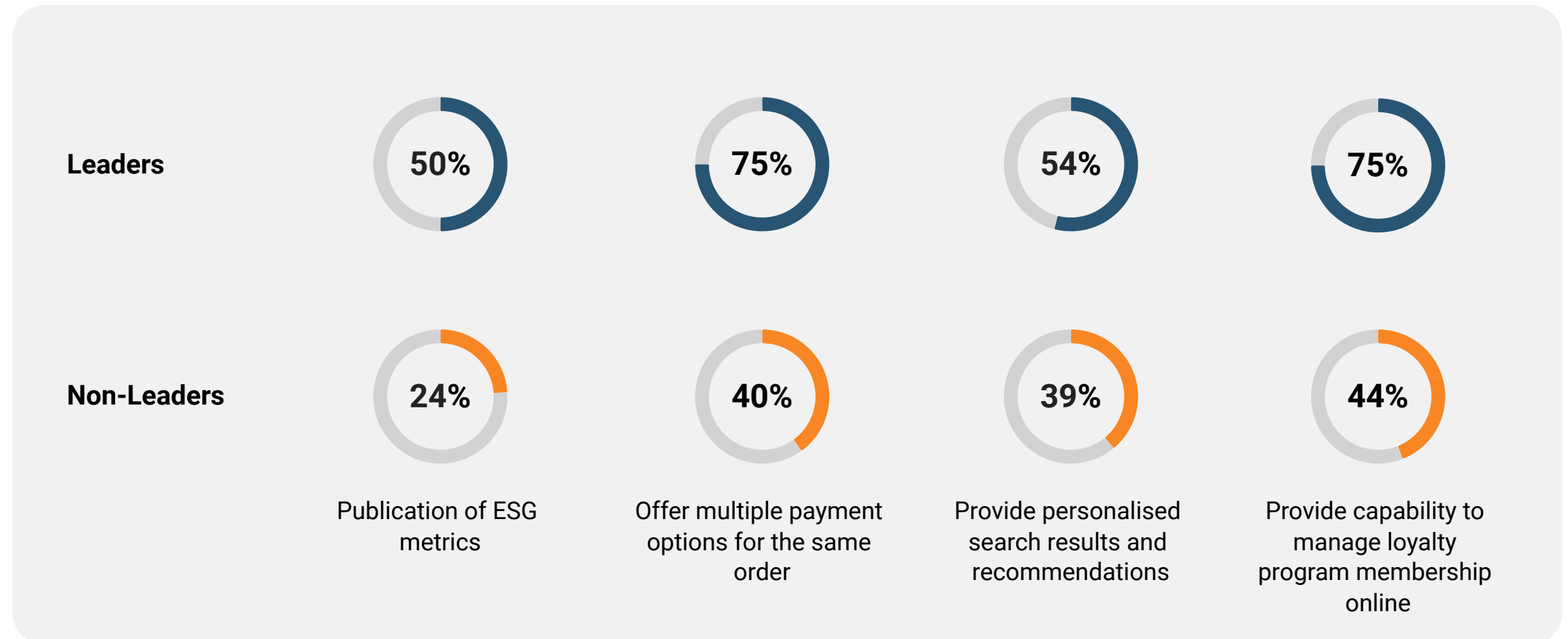
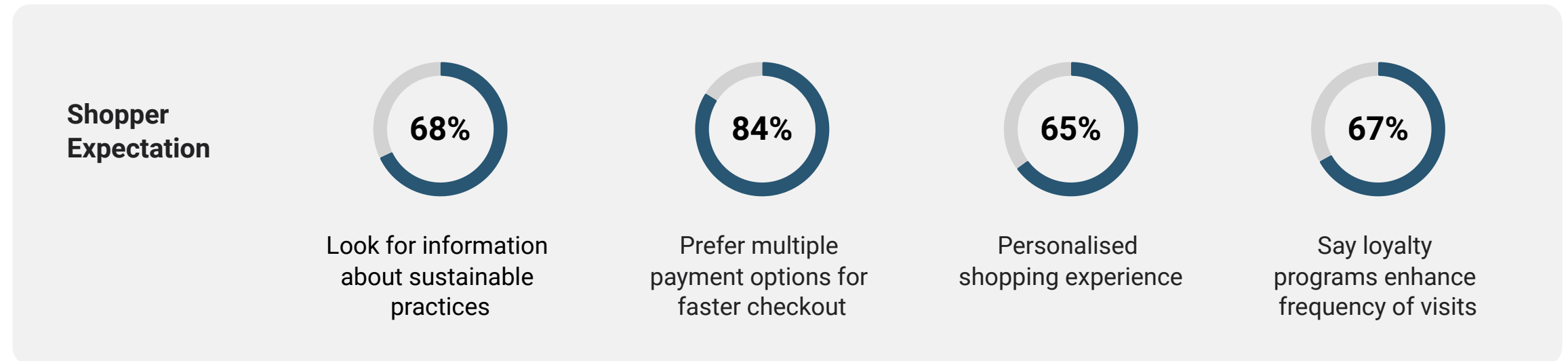
A specialty retailer currently rated a Challenger would stand to gain \$19M per billion dollars in annual revenue by improving its Unified Commerce maturity to a Leader.

Navigating From Basic to Nuanced Retail Experiences

Shifting from the basic to the nuanced, retailers are recognising the need to transcend conventional offerings.

Differentiation now thrives on in-depth capabilities, where retailers embrace advanced technologies and services. The evolution from basic to nuanced retail experience necessitates a steadfast commitment to comprehending and proactively addressing diverse customer needs.

Differentiation is shifting from simply offering a customer experience capability to offering it with depth, nuance, and a personalised context.



2024 Unified Commerce Benchmark
for Specialty Retail

Leaders in Search & Discovery

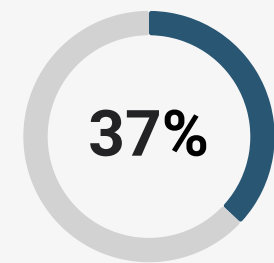


Search & Discovery: Overview

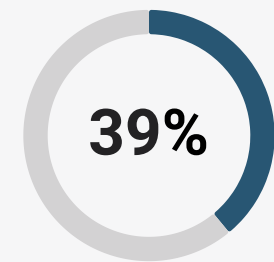
Search & Discovery refers to the set of retailer capabilities and experiences that help shoppers find the most meaningful products and services for their needs.

To do so, a retailer must be able to curate a personalised experience based on shopper intent. Are they looking for a specific item that they need urgently? Are they exploring the brand for the first time and need to understand how it can fit their lifestyle? Are they shopping for an occasion and are willing to be led and inspired?

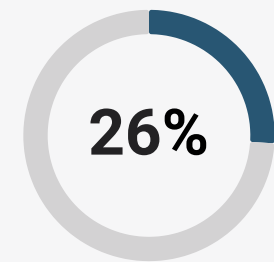
Why it matters



higher conversion rate for shoppers who initiate engagement with a retailer with a product search.



of shoppers will shop at another retailer if their desired product is out-of-stock.



of shoppers are satisfied with their preferred retailer's sustainability practices.

What we assess

We assessed 80 capabilities in this area, covering important themes such as:

- How easy a retailer makes it for shoppers to find relevant products based on their needs through deep search and rich filtering capabilities
- How a retailer educates, informs and inspires the shopper about the latest style trends in the shopper's tribe
- How transparent a retailer is around important sustainability considerations such as materials used, fair wage practices of its manufacturing partners, and supply chain carbon footprint
- How a retailer handles out-of-stock scenarios, both in-store and online, including the ability to back-order or pre-order and the consistency of information about when an item is expected to be back in stock

Key findings in this section

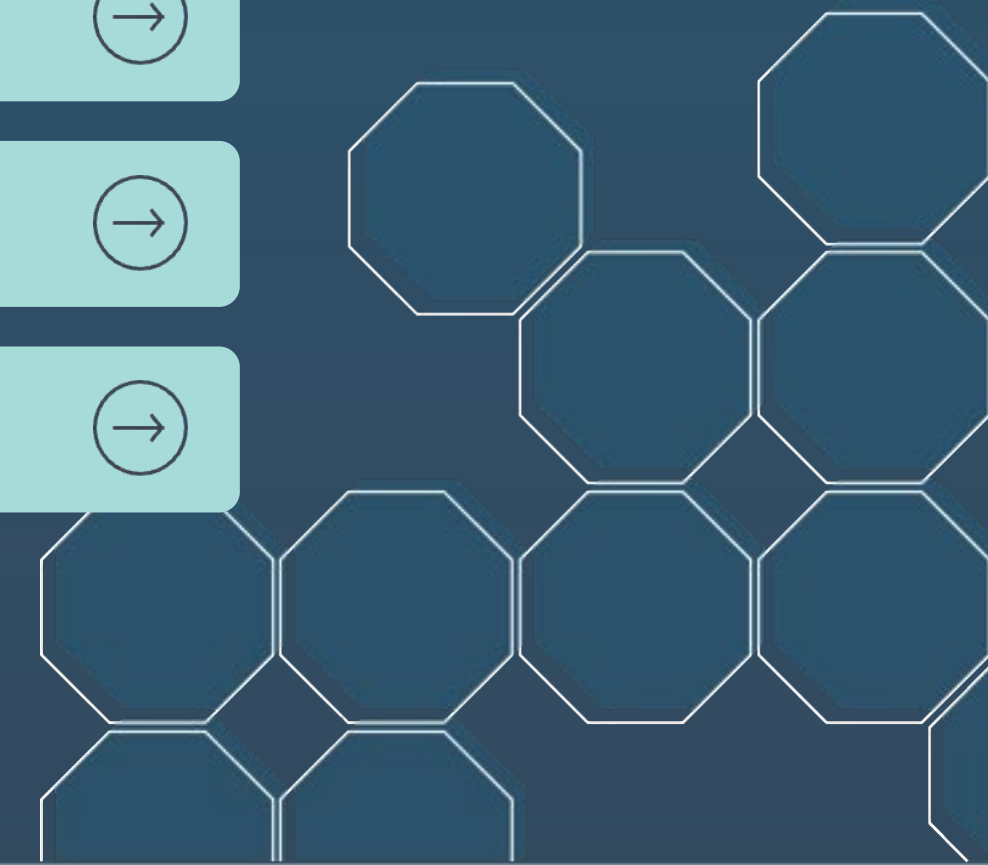
Guided Inspiration



Rich Findability



Immersive Storytelling





Leaders in Search & Discovery

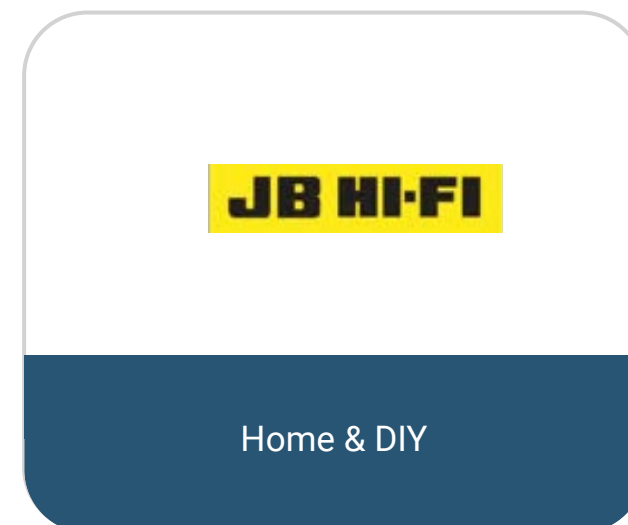
Incisiv recognises these 4 brands as Leaders in Search & Discovery.

Retailers listed in alphabetical order.



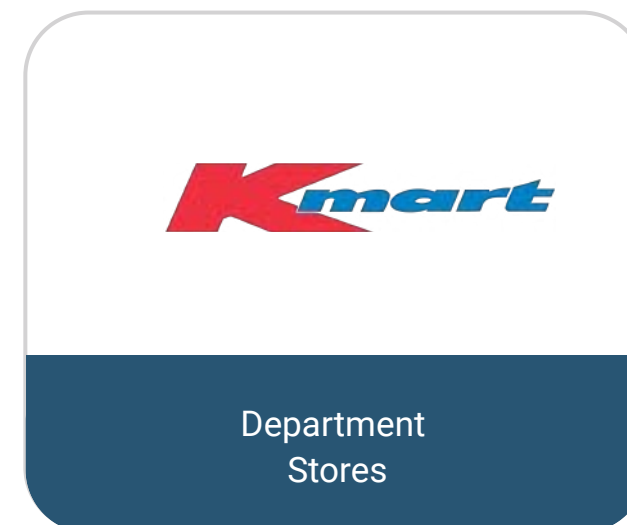
BUNNINGS

Home & DIY



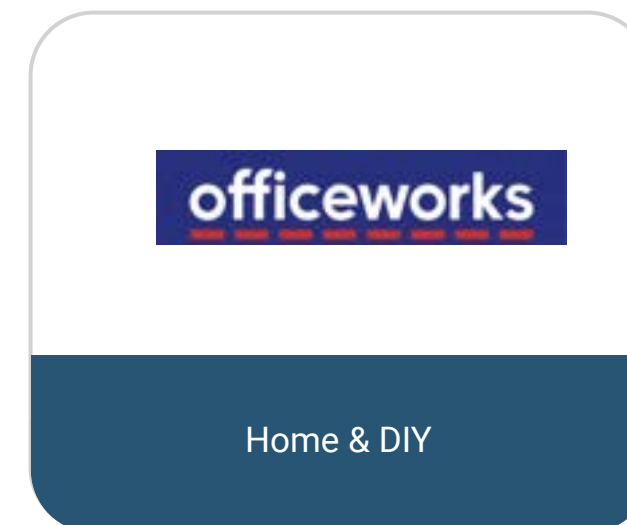
JB HI-FI

Home & DIY



Kmart

Department Stores



officeworks

Home & DIY

Guided Inspiration

Leaders help shoppers discover meaningful products - whether they are looking to fulfil an immediate need or simply in need of inspiration. They strive to go beyond being a place to find products to becoming a lifestyle hack for their shoppers. They do so through advanced digital personalisation, best-in-class, in-store assisted selling, and excellent online and in-store merchandising.



Inventory visibility on product pages

100%

Leaders



88%

Non-Leaders



Bundled product offerings (suggestions to buy the look or set)

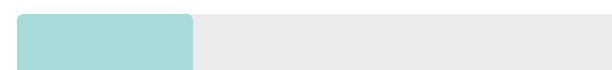
75%

Leaders



36%

Non-Leaders



Personalised recommendations on home page

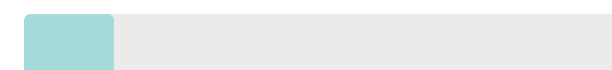
75%

Leaders



12%

Non-Leaders



officeworks



Personalised exploration via a tailored product discovery experience.

53% of shoppers prefer a personalised search experience, receiving tailored results and recommendations based on their preferences and past purchases. Personalisation streamlines the path to purchase, facilitates more individualistic guided exploration, fosters loyalty, and enhances the average order value (AOV)

Officeworks offers tailored suggestions to shoppers based on their preferences, presented in a specially curated section on the homepage and in the form of bundled product suggestions. This transforms the discovery journey into a uniquely personalised experience.

Rich Findability

Leaders understand the broader context of a shopper's purchase intent, and assist them through deeply contextual search and filtering capabilities online and similarly guided assistance in-store, e.g. How soon can it be delivered? Does it have a specific product characteristic or feature they are looking for? Can they back-order their preferred size and colour if it is out-of-stock?



Product inventory availability at store level

100%

Leaders



72%

Non-Leaders



Filter product by industry nuances and availability

75%

Leaders



48%

Non-Leaders



Inventory status callouts for low stock or out-of-stock products

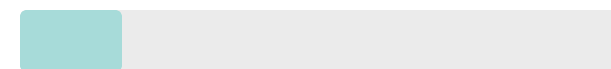
50%

Leaders



20%

Non-Leaders



JB HI-FI



Inventory visibility for simplified search and shopping experience.

46% of shoppers check online inventory availability before making a purchase, with 38% doing so before visiting a store, underscoring the vital role of real-time inventory visibility. This not only enhances transparency during the search process but also significantly streamlines product discovery.

JB Hi-Fi provides visibility into product stock availability at individual store locations and online with informative inventory status callouts, enhancing product discoverability and ensuring a seamless shopper journey.

Immersive Storytelling

Leaders make shoppers feel good about their purchase decisions: what they're buying and who they're buying from. They go beyond product features and immerse the shopper in the brand's ethos. They storytell their greater purpose and have shoppers buy into their vision for why their way is good for the shopper, good for business, and good for the world.



Publish content on sustainability and social initiatives

100%

Leaders



72%

Non-Leaders



Ratings and reviews for specific product dimensions (size or fit)

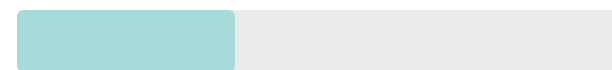
100%

Leaders



40%

Non-Leaders



Responsible sourcing information and brand ESG practices

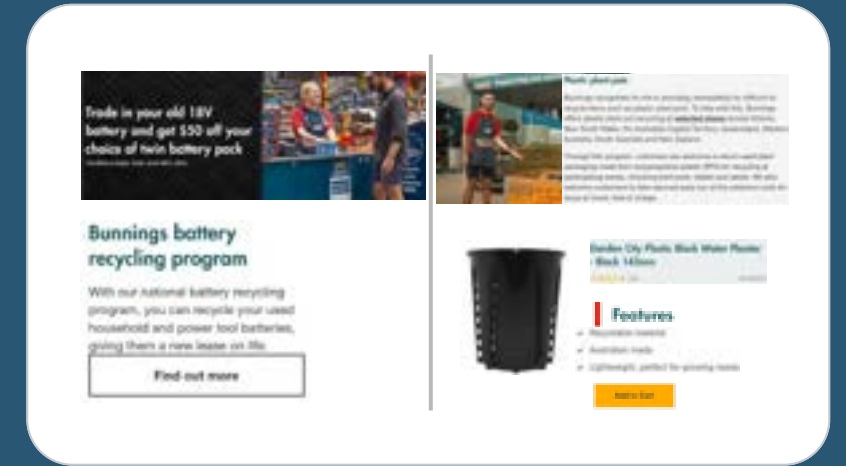
75%

Leaders



54%

Non-Leaders



Purposeful commerce through digital and in-store experience.

Shoppers are willing to pay up to 30% more for products that are sustainable and ethically sourced. By emphasizing items crafted from sustainable materials and advocating for recycling, brands can instill a sense of satisfaction in shoppers with their purchases.

Bunnings places a strong emphasis on its sustainability story, both online and in-store, delving deep into sustainability practices. They offer in-store recycling for batteries and plastic plants. Additionally, each product features detailed sustainability information on its product detail page.

Search & Discovery: Australia Leaders vs Non-Leaders

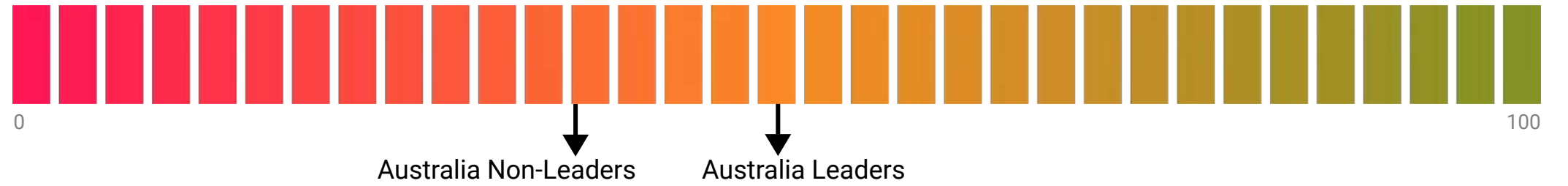
Australia Highlights

Leaders have a high adoption rate of customer experience capabilities like nuanced filters, promotional callouts, and sorting options.

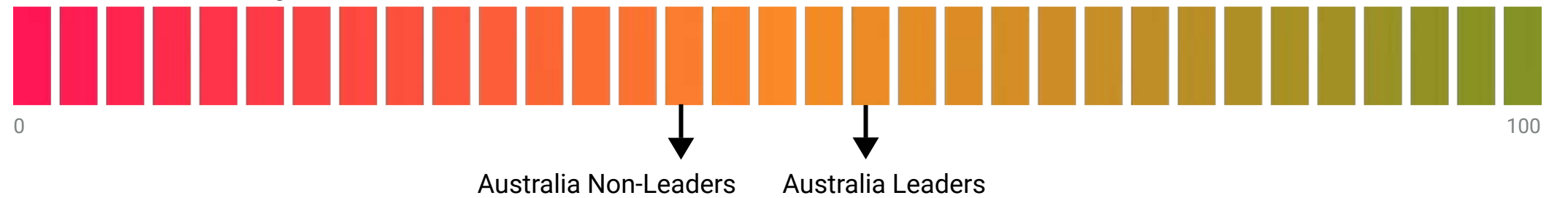
Key Gaps

The adoption of some high-impact capabilities like AR/VR tools, sizing or product comparison tools, recommendations based on past purchases and carbon footprint information, is still low.

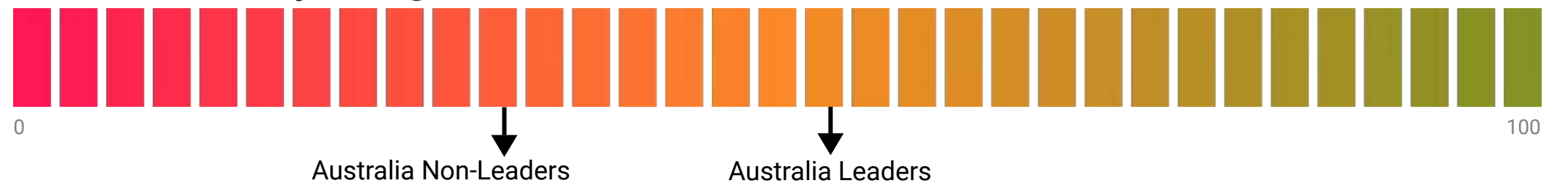
Search & Discovery



Rich Findability



Immersive Storytelling



Guided Inspiration



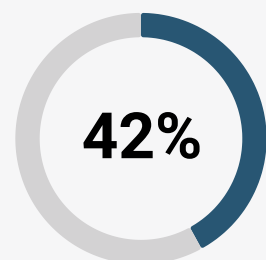
Leaders in Cart & Checkout



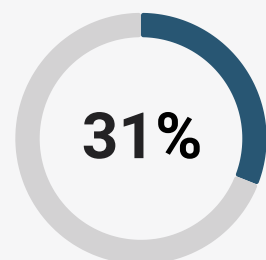
Cart & Checkout: Overview

Cart & Checkout refers to the set of retailer capabilities and experiences that help shoppers make a positive decision at the most critical point of conversion (or abandonment, if they don't get it right). Modern shopping journeys exhibit a clear start-and-stop nature. Retailers must provide shoppers seamless continuity as shoppers switch between the physical and the digital, especially between their shopping cart and wishlist so the burden is not on shoppers to do all the work again.

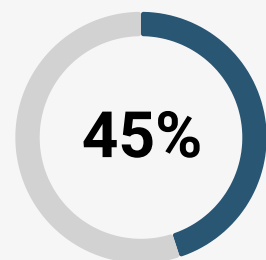
Why it matters



42% of shoppers say checkout is the #1 area retailers should fix to improve in-store experience.



31% of shoppers abandon their shopping cart as they perceive the checkout process to be too long.



45% of shoppers will not retry if they have to re-enter the payment or delivery details.

What we assess

We assessed 47 capabilities in this area, covering important themes such as:

- Whether a retailer is able to provide a unified view of a shopper's cart, wishlist, and purchase history across channels and devices
- How flexible a retailer is with payment options such as the ability to use multiple payment modes for an order
- How easy does a retailer make it for a shopper to pay however they prefer
- How simple does a retailer make it for shoppers to use promotions, store credit, and loyalty points flexibly at the point-of-purchase
- How efficient a retailer's checkout experience is, both online and in-store

Key findings in this section

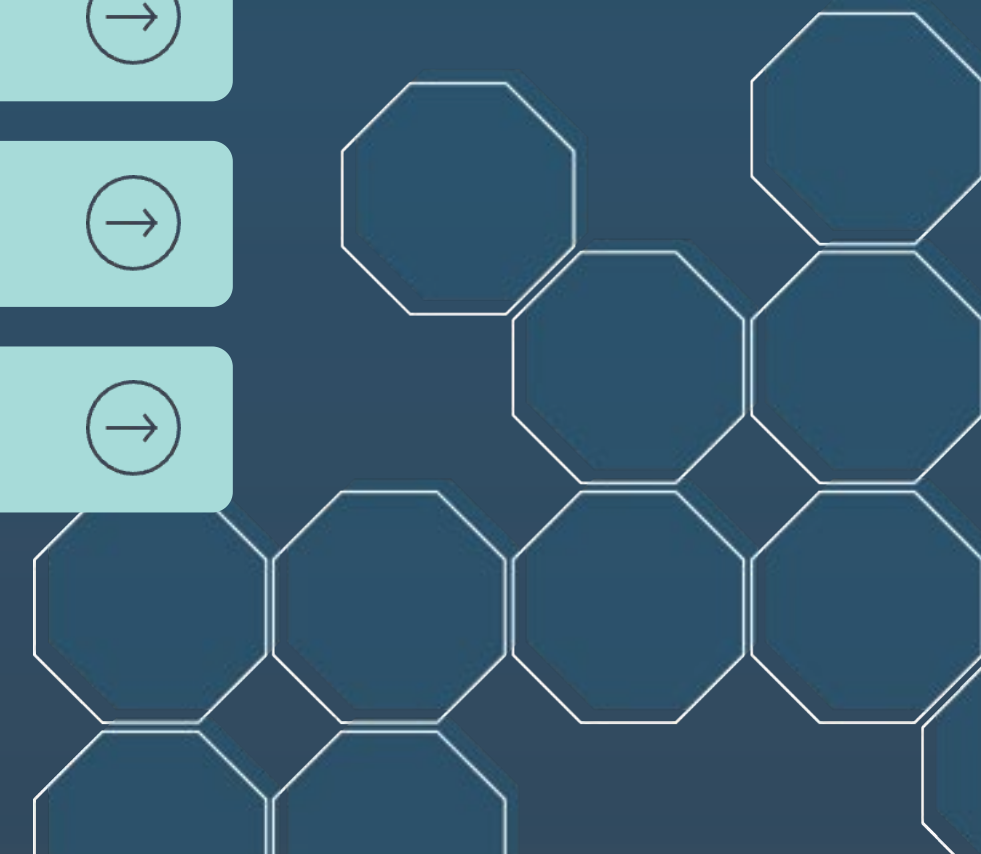
Unified Basket



Payment Flexibility



Frictionless Checkout





Leaders in Cart & Checkout

Incisiv recognises these 3 brands as Leaders in Cart & Checkout.

Retailers listed in alphabetical order.

COTTON:ON

Apparel &
Footwear

DAVID JONES

Department
Stores

General Pants Co.

Apparel &
Footwear

Unified Basket

The biggest point of friction in today's retail customer experience is due to the loss of context when transitioning between the physical and the digital. A unified cart or basket is a foundational capability to provide that critical link across channels. Even though a truly unified basket remains elusive, Leaders have made the most progress.



Ability to view fulfilment options in cart

100%

Leaders



81%

Non-Leaders



View and apply promotions and offers in cart

100%

Leaders



58%

Non-Leaders



Move items from cart to wishlist and back

100%

Leaders



69%

Non-Leaders



General Pants Co.

Your bag



STUSSY
Graffiti LCB Fleece Crew Jumper
Color: STONE
Size: M
In Stock

Delivery

- Each **\$109.95**
- Express Delivery: 1-2 Business Days **\$11.95**
 - Standard Delivery: 3-5 Business Days (Free over \$100) **Free**
 - Australia Post Collection Point: **Free**

Optimising checkout with ability to view and select fulfilment options in cart.

Visibility of fulfilment options in the cart view is crucial for shopper satisfaction and reducing cart abandonment. It fosters transparency, empowering shoppers to make informed decisions upfront, ultimately enhancing their shopping experience. This transparency not only alleviates ambiguity but also cultivates trust, resulting in boosted conversions and strengthened shopper loyalty.

General Pants Co. places a high priority on shopper satisfaction by providing transparent cart experiences. With easily visible fulfilment options, shoppers can confidently make informed choices, enriching their overall shopping journey.

Payment Flexibility

Leaders offer shoppers the widest choice of payment types, both online and in-store, providing that extra bit of flexibility that makes their purchase decision easier. They make it simple and convenient for shoppers to pay however they prefer, including through gift cards, loyalty points, store credit, mobile wallets, pay-later apps, store credit cards, and any combination thereof.



“Buy now, pay later” availability

100%

Leaders



81%

Non-Leaders



Ability to use mixed payment methods for same order

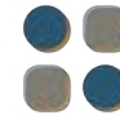
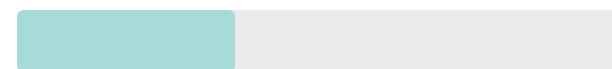
67%

Leaders



42%

Non-Leaders



Applying a combination of brand gift cards

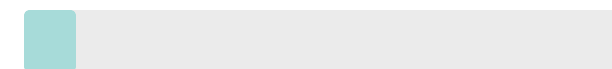
33%

Leaders

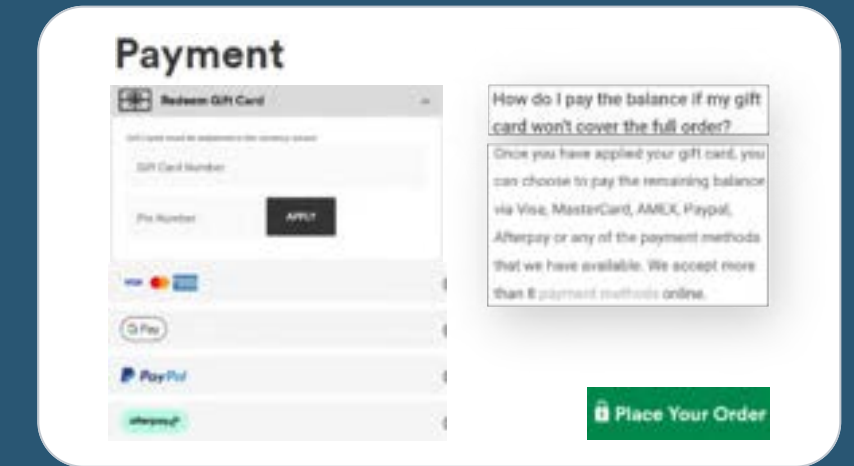


4%

Non-Leaders



COTTON:ON



Facilitate flexibility by integrating multiple payment methods into one order.

Shoppers appreciate having a range of payment options available, allowing them to tailor their method to suit their preferences and circumstances. This flexibility includes traditional methods like credit cards and cash, along with newer options such as digital wallets and buy-now-pay-later services, as well as gift cards. By offering multiple payment options, retailers can accommodate a diverse range of shopper needs, making the checkout process more convenient and efficient.

Cotton On enables shoppers to use a combination of gift cards, credit cards, or mobile wallets to complete their orders.

Frictionless Checkout

Addressing in-store and online cart abandonment is a huge revenue opportunity for retailers. A majority of cart abandonment occurs due to a less-than-ideal shopper experience at checkout - long wait times in-store or multi-step checkout online, for instance. Leaders provide seamless checkout experiences that reduce unnecessary friction at the point of conversion.



Expedited checkout

100%

Leaders



69%

Non-Leaders



Ability to checkout using Apple Pay or PayPal

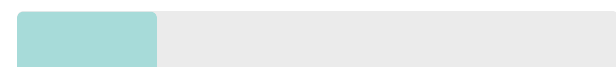
67%

Leaders



31%

Non-Leaders



Ability to use regional wallets such as Alipay

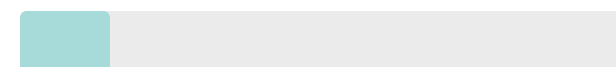
33%

Leaders

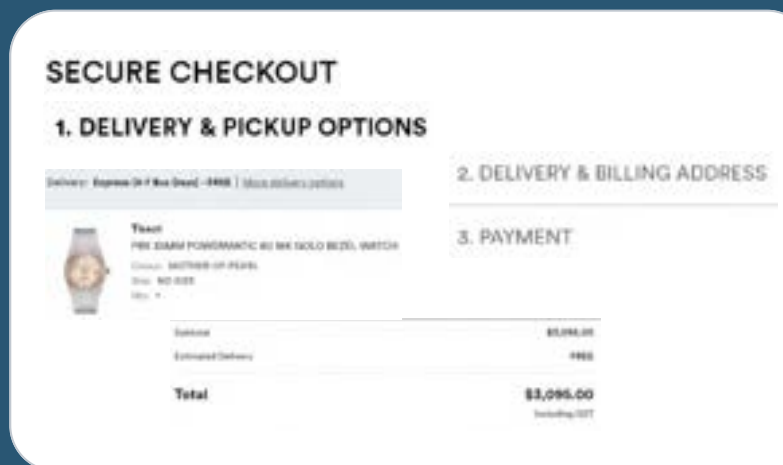


12%

Non-Leaders



DAVID JONES



Expedited one-screen checkout for shopper convenience.

33% of shoppers prefer swift and convenient checkout options while shopping online. Shoppers may abandon their carts if the checkout procedure requires numerous steps and lengthy form submissions.

David Jones provides a single-step checkout option where shipping details are pre-filled, allowing all payment-related information to be entered in a single step.

Cart & Checkout: Australia Leaders vs Non-Leaders

Australia Highlights

Leaders have a high adoption rate of customer experience capabilities like activating promo codes in the shopping cart, enabling expedited guest checkout, and offering diverse payment options such as gift cards, and buy now, pay later services.

Key Gaps

The adoption of some high-impact capabilities like paying through closed-loop wallets, offering clickable promo codes, and redeeming loyalty points for payments, is still low.

Cart & Checkout



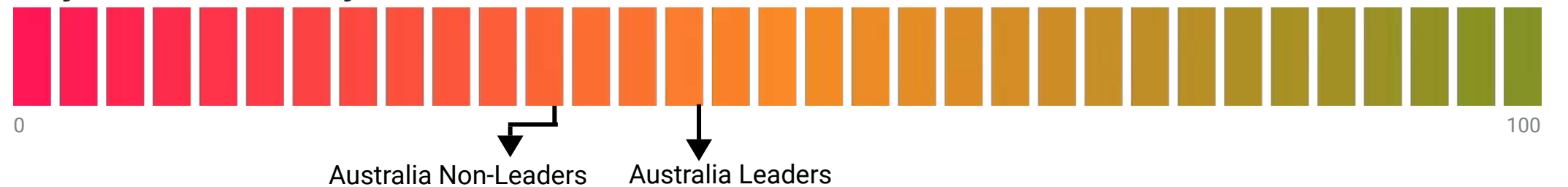
Unified Basket



Frictionless Checkout



Payment Flexibility



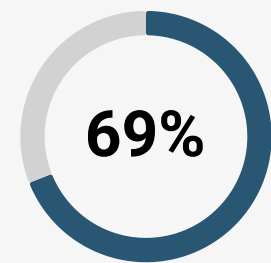
Leaders in Promising & Fulfilment



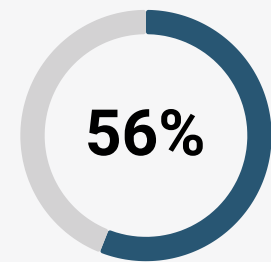
Promising & Fulfilment: Overview

Promising & Fulfilment refers to the set of retailer capabilities and experiences related to offering shoppers the choice, confidence and clarity of how and when they can receive the products they want to order. If retailers can assist shoppers with important ordering and delivery-related information across the shopping journey, they increase their probability of conversion. What is the earliest I could get this item and how? Can I order an item for in-store pick-up and another for delivery as part of the same order? Can a store associate help me back-order an item currently out-of-stock in my preferred colour or size?

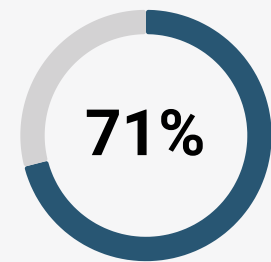
Why it matters



69% of shoppers value expedited delivery (same business day), but are only willing to pay < \$10 as extra fee.



56% of shoppers would opt for eco friendly delivery options even if it takes more time.



71% of shoppers want a self-service option to be able to edit orders after placing them.

What we assess

We assessed 61 capabilities in this area, covering important themes such as:

- What types of delivery and pick-up options does a retailer offer, and how easy does it make it for shoppers to pick different delivery or pick-up types within the same order
- How early in the shopping journey does a retailer begin to make delivery promises, and how consistently and accurately does it keep them through the order and fulfilment process
- How a retailer handles out-of-stock scenarios, both in-store and online
- How a retailer helps a shopper remain informed about their order, including any issues if they arise
- How does a retailer promote and incentivise sustainable delivery and pick-up choices

Key findings in this section

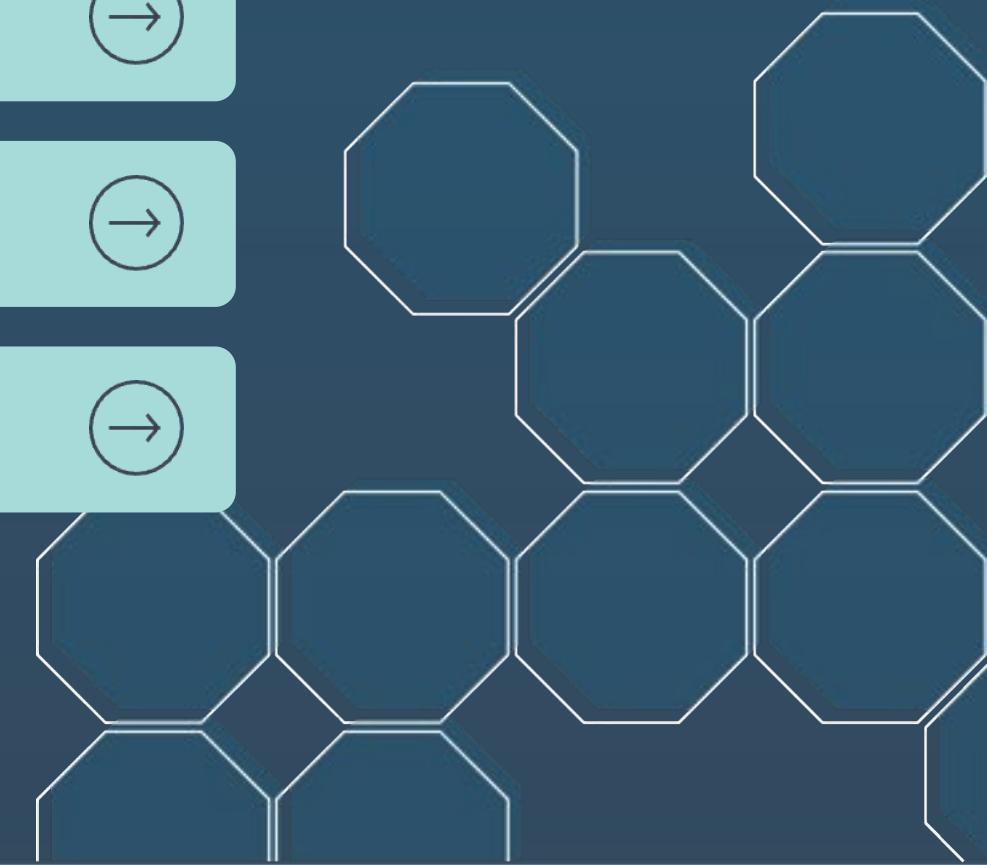
Ordering Flywheel



Dynamic Promising



Flawless Fulfilment





Leaders in Promising & Fulfilment

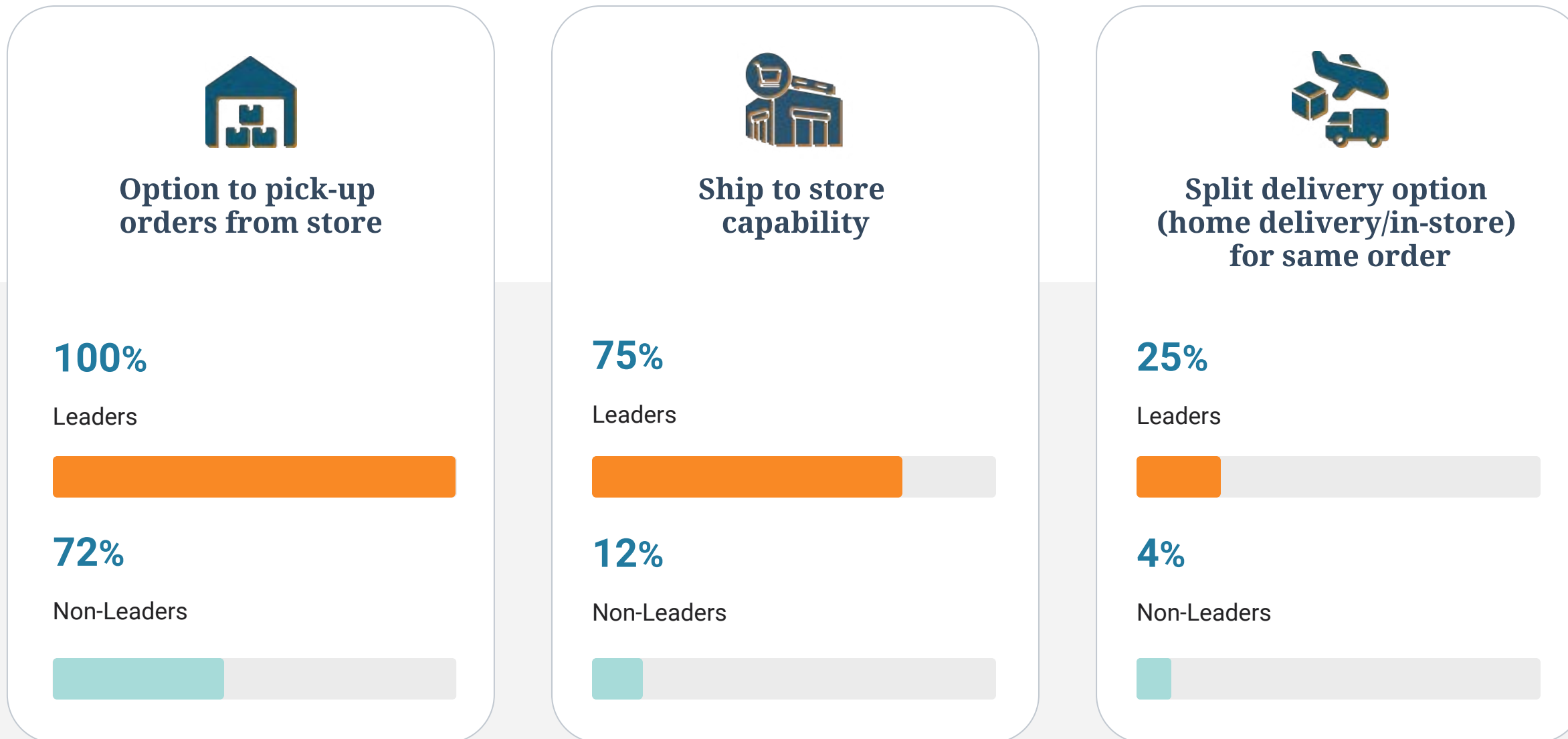
Incisiv recognises these 4 brands as Leaders in Promising & Fulfilment.

Retailers listed in alphabetical order.

 Home & DIY	 Department Stores	 Apparel & Footwear	 Home & DIY
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Ordering Flywheel

Leaders offer shoppers a comprehensive set of delivery and pick-up options, focusing not just on speed but on flexibility to fit busy lifestyles. They accommodate ordering complexity without compromising checkout convenience, allowing shoppers to select different delivery options for products within the same order for instance.



Split delivery capability for flexible and convenient order fulfilment

41% of shoppers emphasise that the delivery and fulfilment experience's quality is a key factor in selecting a retailer's digital channel. Offering shoppers the option to divide fulfilment methods for their orders provides added flexibility and efficiency, ultimately boosting retention rates and promoting repeat purchases.

Bunnings provides split-shipping options (click & collect and home delivery) for a single order transaction.

Dynamic Promising

Leaders understand that simply exposing available inventory to shoppers is no longer good enough. They provide early, narrow, consistent and accurate delivery estimates throughout the shopper journey. Retailers communicate with shoppers in case a delivery estimate changes during the order process, helping build a higher degree of shopper confidence and trust.



Order tracking via website/app or email/text channels

100%

Leaders



74%

Non-Leader



Delivery timelines basis destination postcode in cart view

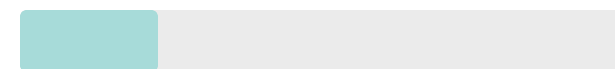
75%

Leaders



30%

Non-Leaders



Membership program for free delivery

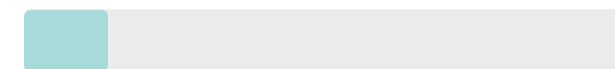
50%

Leaders



12%

Non-Leaders



DAVID JONES

How can I track my delivery?

When you purchase on David Jones online you'll receive an email with a tracking number. You can use this tracking number to track your order. You can also view the delivery status of your order in your Online Account. Some products are shipped directly from our suppliers and may not have a tracking number.

Effortless order tracking across multiple channels.

The commitment to fulfilling promises encompasses ensuring that orders are prepared and dispatched within the specified timeframes, fostering a sense of dependability and confidence. Shoppers expect retailers to provide immediate updates on order status and proactively communicate any issues or delays with the order, while also anticipating convenient methods for tracking their orders.

David Jones allows shoppers to track their order status in real-time, on the website/app as well as through email.

Flawless Fulfilment

Leaders make sure shoppers' product pick-up or delivery experience is as good as their shopping journey. Not only do leaders meet or beat their delivery promises consistently, they do so while being more environmentally friendly. They also offer shoppers greater post-order flexibility, such as complete or partial cancellations, item modifications and change of delivery or pick-up method.



Real-time order pick-up notifications/alerts by store

100%

Leaders



57%

Non-Leaders



Ability to the contact help desk for order modifications / cancellations

100%

Leaders



60%

Non-Leaders



Sustainable product packaging

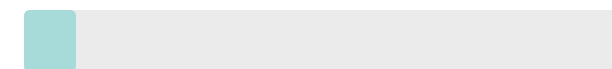
50%

Leaders



8%

Non-Leaders



General Pants Co.

Can I cancel my order?

Once you have placed your order, it is usually not possible to make any modifications to it. However, if you need to make any changes, you can contact our customer service team through Live Chat or email. Our dedicated team will make every effort to assist you in cancelling your order if it is still possible to do so.

Please keep in mind that we are unable to cancel orders once the items have been shipped. In such cases, if you still wish to return the items, you can do so in accordance with our returns policy.

Agent support for order modifications and cancellations.

Efficient handling of order modifications fosters loyalty and positive word-of-mouth. Retailers benefit from reduced errors, smoother transactions, and enhanced brand reputation. Additionally, transparent cancellation policies can improve customer satisfaction by giving customers control over their orders and fostering trust in the fulfilment process.

General Pants Co. allows shoppers to contact customer support teams for order cancellations.

Promising & Fulfilment: Australia Leaders vs Non-Leaders

Australia Highlights

Leaders have a high adoption rate of customer experience capabilities such as Buy Online, Pick Up In-Store, real-time order tracking, and updation.

Key Gaps

The adoption of certain high-impact capabilities, such as expedited delivery options, split delivery, and the ability to modify or cancel orders post-confirmation, remains low.

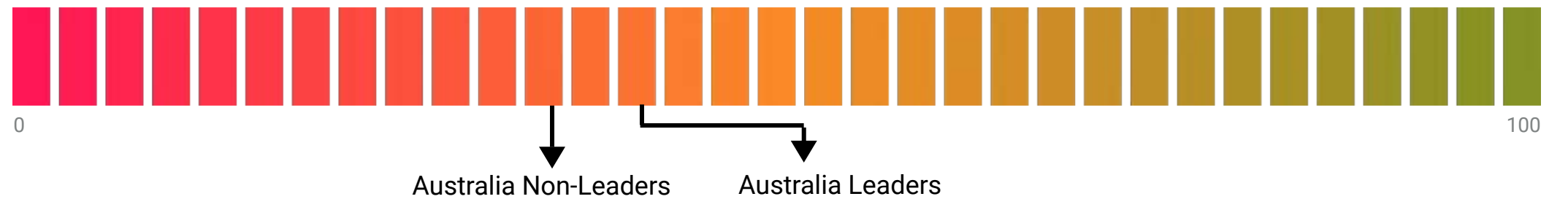
Promising & Fulfilment



Ordering Flywheel



Dynamic Promising



Flawless Fulfilment



2024 Unified Commerce Benchmark
for Specialty Retail

Leaders in Service & Support



```
user_agent => no value => no value
user_agent => no value => no value

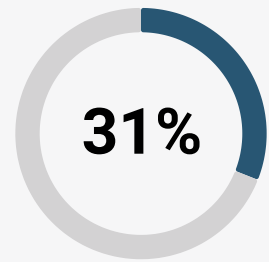
system
system support => enabled
Revision => $145
tidy
Tidy support => enabled
tidy_release => 22 October 2006 -
Extension Version => 2.0 (3145)
Directive => Local Value => Master Value
tidy_clean_output => 0 => 0
tidy_default_config => no value => no value
tokenizer
Tokenizer Support => enabled
xml
XML Support => enabled
XML Session Serializer => enabled
xml
XML Support => active
XML Namespace Support => active
libxml2 Version => 2.9.4
xmlreader
XMLReader => enabled
xmlrpc
core_library_version => xmlrpc-epi v. 0.51
php_extension_version => 0.51
author => Dan Libby
homepage => http://
open_sourced_by =>
```

Service & Support: Overview

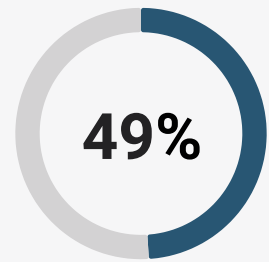
Service & Support refers to the set of retailer capabilities and experiences related to offering shoppers personalised assistance across their relationship lifecycle.

Shoppers are pushing retailers to two extremes of service: “give me service options that don’t interrupt the natural flow of my day” and “make me feel special through high-touch, personal service.” Retailers can balance the two by using digital tools to improve service efficiency and the human empathy of their store and call centre associates to deliver authenticity.

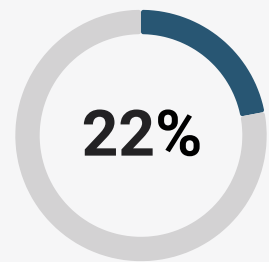
Why it matters



31% of shoppers say that retailers offer them a personalised shopping experience.



49% of shoppers find the refund and return process to be very time consuming.



22% of shoppers prefer 24*7 availability of customer support.

What we assess

We assessed 102 capabilities in this area, covering important themes such as:

- How proactive a retailer is in offering assistance across the engagement lifecycle with the shopper
- How extensive is a retailer’s customer service and support offering
- How personalised and seamless is a retailer’s customer service across various digital and in-person touchpoints
- How a retailer helps shoppers resolve service issues with minimal disruption through self or silent service
- How available, responsive and efficient are a retailer’s service options, especially those that involve human interaction
- What value-added services, expertise and consultative service does a retailer provide
- How a retailer handles returns, refunds and exchanges

Key findings in this section

Total Transparency



Comprehensive Service



Consultative Expertise





Leaders in Service & Support

Incisiv recognises these 3 brands as Leaders in Service & Support.

Retailers listed in alphabetical order.



Apparel &
Footwear



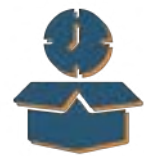
Home & DIY



Home & DIY

Total Transparency

Leaders are more transparent with shoppers across a variety of relationship vectors - from orders to service requests, from data use to supply chain practices. They also ensure the drop-off in transparency between digital and physical channels isn't as steep by providing the necessary tools and training for store and call centre associates.



Real-time order status alerts or notifications

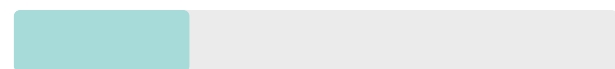
100%

Leaders



38%

Non-Leaders



Ability to initiate and track returns online

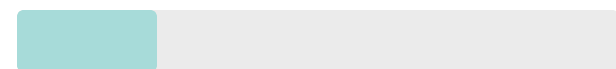
67%

Leaders



27%

Non-Leaders



Loyalty program registration and account management

67%

Leaders



46%

Non-Leaders



TRACK MY ORDER

Once your order has been dispatched from our warehouse you will receive a shipping confirmation email from us (serving as our acceptance of your order) with your tracking number and link to track your order online. You will then be able to track your order via the online tracker. As this relies on our delivery partner to update, please allow 1-2 days for this information to be updated.

HOW DO I TRACK MY RETURN?

You will receive email, updated when your item has been picked up by AusPost and once the return has arrived at the warehouse.

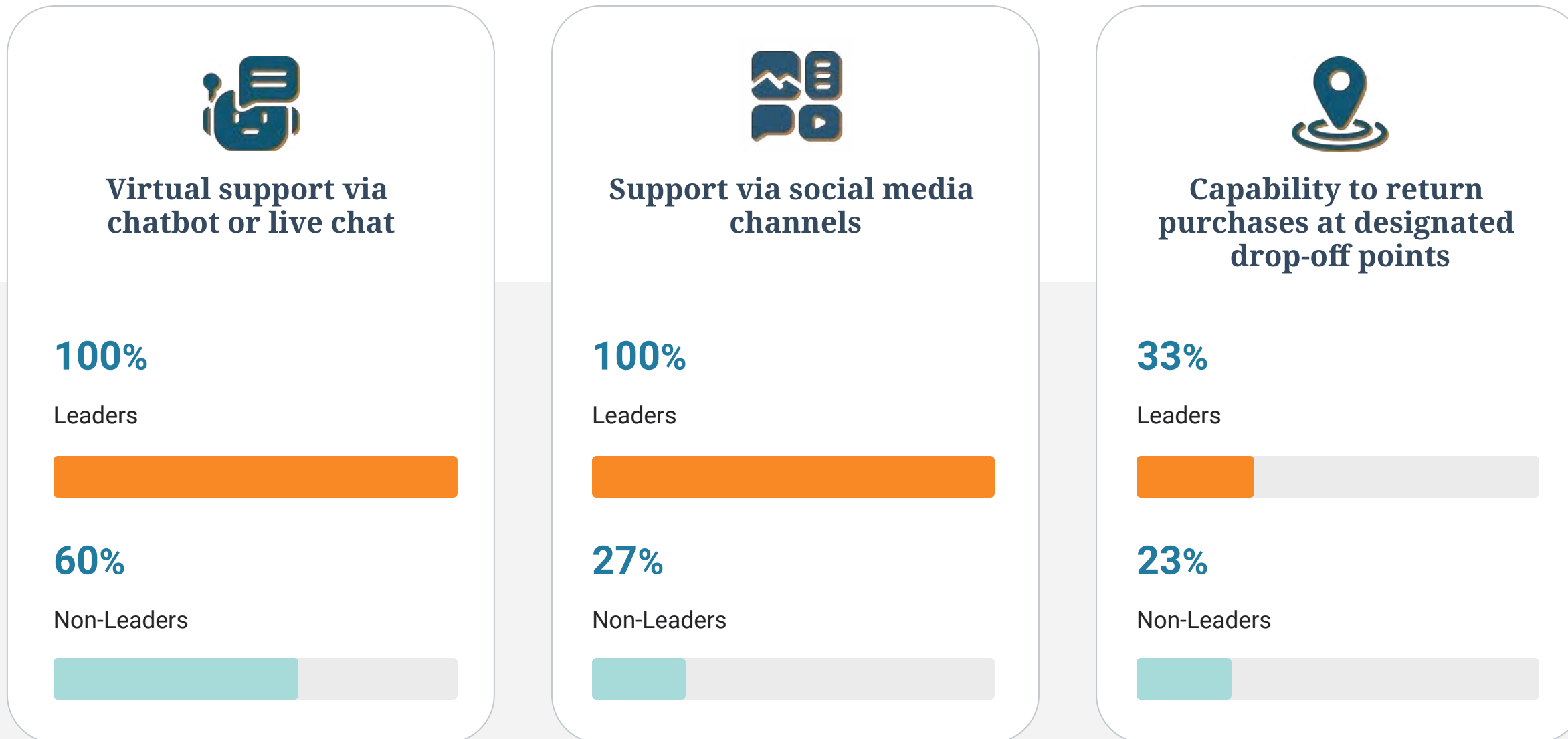
360 degree support via regular order updates, and return tracking ability.

Shoppers expect near real-time updates at key point of purchase and return process. 85% of shoppers would buy again from a brand that offers a smooth return experience. Order and return transparency reduce customer churn and help improve brand loyalty.

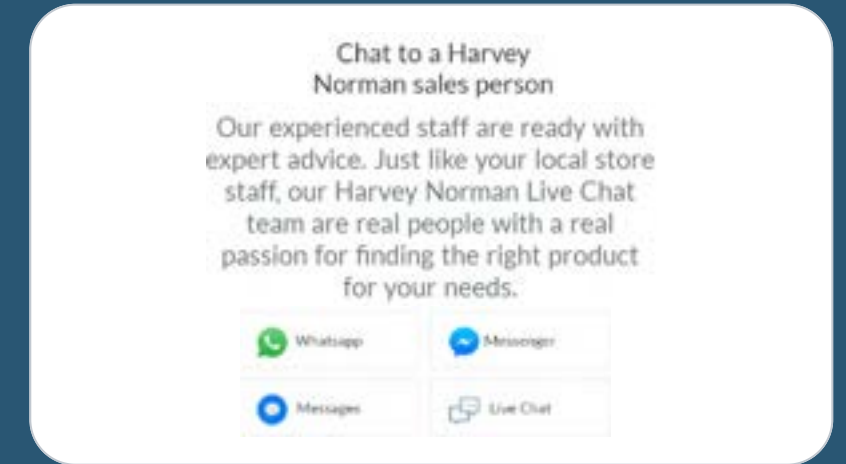
Adidas sends regular order updates including alerting the shopper when the return is accepted, and when the refund is processed.

360-Degree Service

Leaders offer shoppers a wide variety of service options - from in-store assistance to call centres, social media support to live agents on their website and mobile app. Importantly though, they offer seamless continuity, consistent quality and always-on availability across their service portfolio. They empower shoppers to self-serve most of their service needs, offer 'silent' support options such as via text and ensure they don't have to wait long to talk to a human if they choose to.



Harvey Norman



Customer support via social media platforms.

55% of shoppers highlight that customer service plays a crucial role in their decision to buy from a retailer. Social media platforms enable retailers to tailor their interactions with shoppers, thereby saving time for those seeking prompt responses to their inquiries.

Harvey Norman provides integrated customer support with options for both self-service and assisted shopping and query resolution. Additionally, it offers product information and assistance via social media and live chat.

Consultative Expertise

Leaders don't just limit services to providing support. They offer value-added services such as customisations, style and fit guidance and in-store hospitality to turn service interactions into a secret sauce of brand stickiness. Leaders empower store and call centre associates with the tools and training needed to convert a moment of potential churn into one that builds feverish brand loyalty.



Store associates' ability to look up inventory and product details

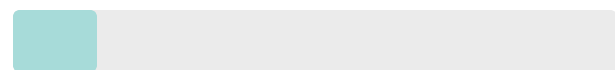
100%

Leaders



12%

Non-Leaders



In-store appointment scheduling via brand's digital channel

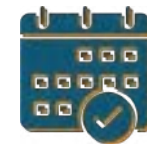
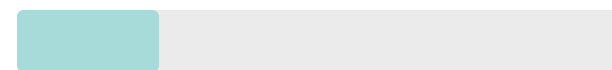
67%

Leaders



23%

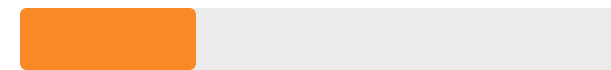
Non-Leaders



Ability to sign up for in-store classes/events

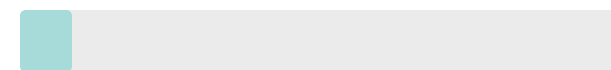
33%

Leaders



4%

Non-Leaders



Book a kitchen consultation

Book a design consult with a Bunnings Design Consultant, who will talk you through the entire process step-by-step to ensure the end result is perfect for you. You can choose between a virtual or in-store consultation for just \$49.

Bunnings utilises its stores as a hub of unparalleled service.

Through the provision of specialised amenities like in-store appointments, personalised consultations, and custom design services, a physical retail space evolves into more than just a place to shop. In fact, shoppers are increasingly attracted to retailers that deliver an immersive experience, whether it's in-store or online.

Bunnings provides an exclusive service enabling shoppers to schedule appointments for personalised product customisations and design consultations in-store, virtually, or at home.

Service & Support: Australia Leaders vs Non-Leaders

Australia Highlights

Leaders have a high adoption rate of customer experience capabilities like self service, email and phone support, wishlist management, and automated assistance with product related inquiries.

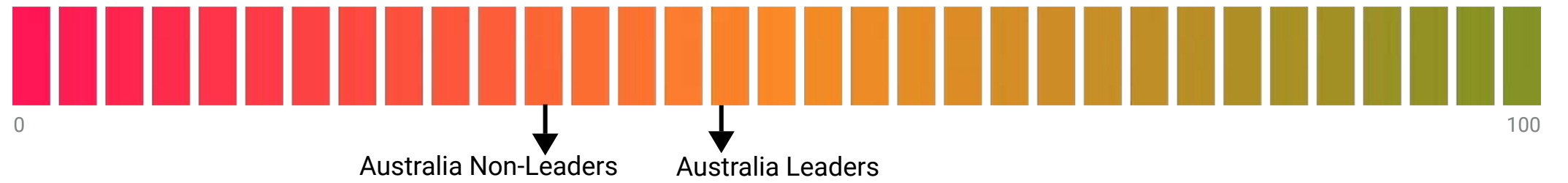
Key Gaps

The adoption of some high impact capabilities like online shopper communities, store associates' ability to access purchase history, self service for order modifications, is still low.

Service & Support



360 Service



Total Transparency



Consultative Expertise



2024 Unified Commerce Benchmark
for Specialty Retail

Leaderboard



2024 Unified Commerce Leaders

The logo for Bunnings, featuring a stylized green and red 'B' followed by the word 'UNNINGS' in green capital letters.

Home & DIY

The logo for Cotton:On, featuring the word 'COTTON:ON' in red capital letters with a colon between the words.

Apparel &
Footwear

The logo for Harvey Norman, featuring the words 'Harvey Norman' in blue with a red underline.

Home & DIY

The logo for JB Hi-Fi, featuring the words 'JB HI-FI' in black capital letters on a yellow rectangular background.

Home & DIY

Dive Deeper

Specialty retailers have the opportunity to learn from the findings of this exclusive benchmark.

Benchmark Your Unified Commerce Experience and Get a Custom Brand Assessment

Want to evaluate your operations?

Let's discuss how you can be part of the Unified Commerce Benchmark.

It includes a detailed brand assessment and a personalised walkthrough.



Incisiv is a peer-to-peer executive network and industry insights firm for consumer industry executives navigating digital disruption.

Incisiv offers curated executive learning, digital maturity benchmarks, and prescriptive transformation insights to clients across the consumer and technology industry spectrum.

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cloud.google.com



Manhattan is a technology leader focused on improving experiences and outcomes in supply chain commerce. We provide leading software solutions for omnichannel commerce, supply chain planning and supply chain execution. Our cloud-native Manhattan Active® platform technology and unmatched industry experience help increase top-line growth and bottom-line efficiency for the world's leading brands.

Manhattan designs, builds and delivers innovative solutions for stores, transportation networks and fulfilment centres, eliminating silos created by legacy commerce, warehouse, and transportation systems to create seamless operations and optimal efficiency.

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Zebra empowers organisations to thrive in the on-demand economy by making every front-line worker and asset at the edge visible, connected and fully optimised. With an ecosystem of more than 10,000 partners across more than 100 countries, Zebra serves customers of all sizes – including 86% of the Fortune 500 – with an award-winning portfolio of hardware, software, services and solutions that digitise and automate workflows. Supply chains are more dynamic, customers and patients are better served, and workers are more engaged when they utilise Zebra innovations that help them sense, analyse and act in real time.

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