Manhattan.   Google Cloud   ZEBRA

2024 Benchmark

Unified Commerce for Specialty Retail in Singapore

INCISIV

A Mosaic of Consumerism: Embracing Diverse Retail Realities

Cultural and Demographic Nuances

Retailers in Singapore must tailor their strategies to the diverse tastes and preferences of the local population. Recognising these variances is crucial. What appeals to younger, tech-savvy shoppers might differ significantly from older consumers, and cultural backgrounds shape shopping habits. Success in Singapore's omnichannel retail hinges on this nuanced understanding and the ability to adapt offerings accordingly – a cornerstone of effective Unified Commerce.

Balancing Compliance and Customer Experience

Regulations like the Personal Data Protection Act (PDPA) and the sustainability standards are not just compliance issues; they reflect customer expectations. Retailers must integrate these into their strategies, creating experiences that respect privacy and ethical practices while delivering personalisation and efficiency. This balance is key to successful Unified Commerce in Singapore.

Economic Factors Influencing Retail in Singapore

The varied economic landscape of Singapore demands adaptable retail strategies. Retailers need to align their value propositions with the purchasing power and priorities of different consumer segments. In affluent areas, premium services and products are more viable, while in other segments, value-driven options may be more appealing. With 95% of millennials voicing a strong preference for sustainable products, economic and ethical sensitivity is vital for a successful Unified Commerce approach in Singapore.

64% of Singapore 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

Singaporean retail excels by merging digital platforms with physical stores, creating a fluid transition for customers between online and in-store experiences. This integration, central to Unified Commerce, leverages advanced technologies to enhance customer satisfaction and ensures that retailers stay ahead in the dynamic retail environment.

New Dimension in Convenience

In Singapore, convenience has taken on new dimensions, driven by advanced technologies like AI. Retailers use AI to personalise shopping experiences, predict customer needs, and optimise inventory management. Features such as smart recommendations and automated customer support enhance the shopping journey. This commitment to leveraging AI for convenience reflects the latest market trends, setting new standards in retail efficiency and customer satisfaction.

Realising the Sustainability Vision

In Singapore, sustainability is becoming a fundamental expectation among consumers, not just a passing trend. Retailers are integrating eco-friendly practices across their operations, from sustainable sourcing to green logistics. This dedication resonates with the growing eco-consciousness of Singaporean shoppers, setting retailers apart in a competitive market and aligning with the latest market trends towards responsible consumption.

72% of Singapore consumers shop both online and offline accounting for over 63% of sales.

Unified Commerce: Singapore's Retail Evolution

Crafting a Unique Experience

Unified commerce is essential in Singapore's retail, blending diverse consumer preferences into a cohesive shopping experience. Retailers use AI for personalised service and incorporate sustainable practices. Retailers have developed unique strategies aligned with the high penetration of mobile devices and the adoption of social commerce to boost customer satisfaction and keep brands competitive advantage.

Adapting to Diverse Values

Singapore's retail sector caters to varied preferences, with digital-first brands focusing on premium experiences and sustainability. In contrast, major retailers emphasize value and affordability, crucial amid rising living costs. Offering competitive pricing, discounts, and promotions, they attract budget-conscious consumers while maintaining quality. This approach ensures relevance and competitiveness.

Evolving through Adaptation and Innovation

In Singapore's fast-paced retail market, continuous innovation is essential. Retailers are leveraging AI for personalised experiences, with 74% of consumers valuing AI-driven recommendations. IoT technology streamlines inventory management, and digital payment adoption has reached 87%, reflecting the importance of seamless transactions. Leading these changes ensures competitiveness and meets evolving consumer needs.

eCommerce sales in Singapore are expected to grow at a CAGR of **8.9%**, 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**.

33

retailers benchmarked in Singapore

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
American Eagle Outfitters
Beyond The Vines
Charles & Keith
H&M
Kydra
Levi's
Love & Bravery
Love, Bonito
Lucca Vudor
Nike
Puma
Running Lab
Sketchers
Suicoke
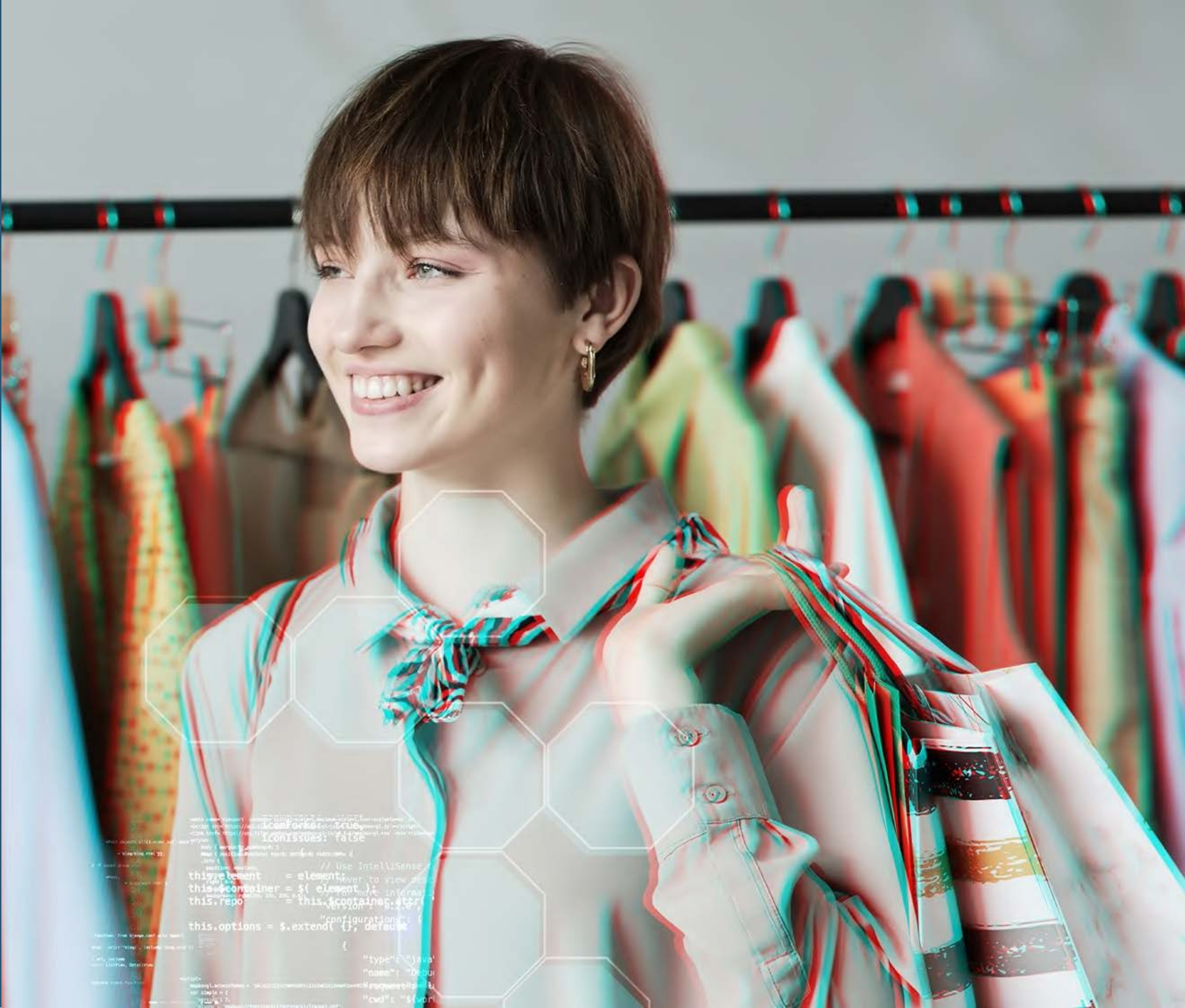Takashimaya
Tommy Hilfiger
Uniqlo
Zara

Home & DIY

Atomi
FortyTwo
IKEA
Nitori
Originals Furniture
Proof Living
Soul & Tables

Luxury

Burberry
Chanel
Dior
Gucci
Hermes
Louis Vuitton
Prada

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 33 retailers across 3 specialty retail segments. We chose a mix of top omnichannel retailers by revenue across Apparel & Footwear, 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.
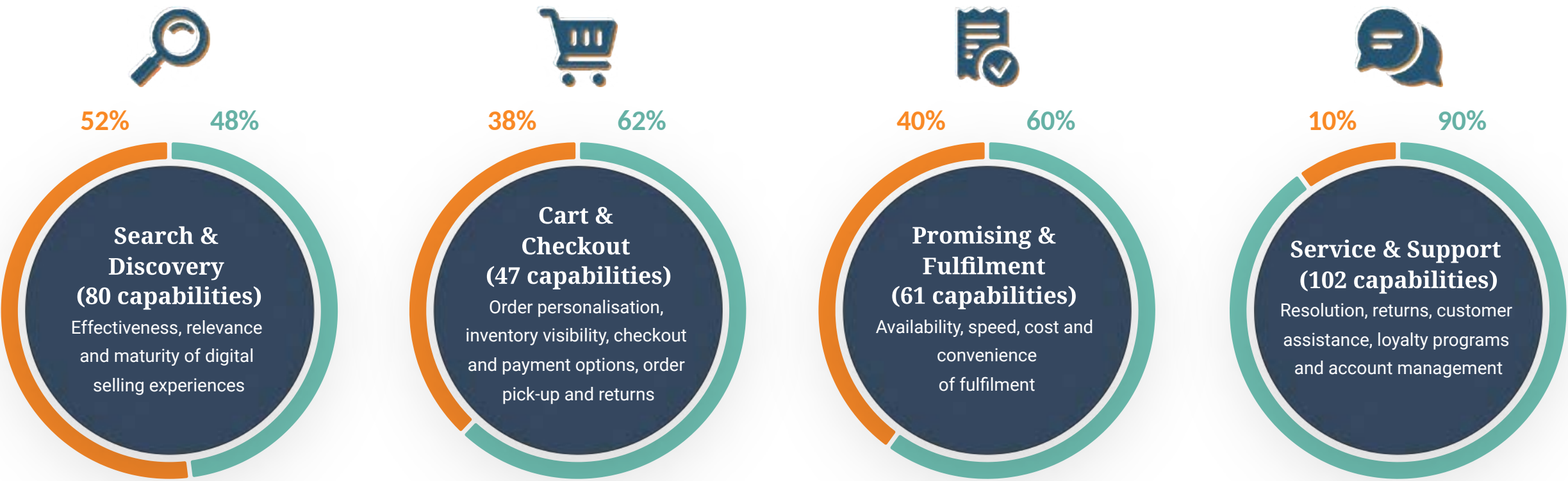

Rating Categories for Assessed Retailers

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.

52%   48%

Search & Discovery (80 capabilities)
Effectiveness, relevance and maturity of digital selling experiences

38%   62%

Cart & Checkout (47 capabilities)
Order personalisation, inventory visibility, checkout and payment options, order pick-up and returns

40%   60%

Promising & Fulfilment (61 capabilities)
Availability, speed, cost and convenience of fulfilment

10%   90%

Service & Support (102 capabilities)
Resolution, returns, customer assistance, loyalty programs and account management

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 33 retailers across **4 specialty retail segments**. We chose a mix of top omnichannel retailers by revenue: Apparel & Footwear (19), Home & DIY (7) and Luxury (7). 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 (19)
- Home & DIY (7)
- Luxury (7)

Rating Categories for Assessed Retailers

2024
Unified Commerce
Benchmark for
Specialty Retail

Laggard

2024
Unified Commerce
Benchmark for
Specialty Retail

Follower

2024
Unified Commerce
Benchmark for
Specialty Retail

Challenger

2024
Unified Commerce
Benchmark for
Specialty Retail

Leader

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.

Overall
Leaders

Overall: **Singapore Leaders vs Non-Leaders**

Singapore Highlights

Retailers are diligently addressing table stake capabilities such as optimising search processes, offering promotions, diversifying payment methods, promoting sustainability and improving fulfilment services. However, they are lagging behind in adopting many high impact differentiating capabilities like nuanced filtering options, payments via reward points, expedited fulfilment options and comprehensive customer service.

Outlook

Unified commerce adoption remains relatively low, even among retail leaders, with differentiating experience adoption at only 32%. To achieve success in the future, retailers must maintain their strong focus on execution while reevaluating their strategy.

Search & Discovery

0   100

Singapore   Singapore
Non-Leaders   Leaders

Cart & Checkout

0   100

Singapore   Singapore
Non-Leaders   Leaders

Promising & Fulfilment

0   100

Singapore   Singapore
Non-Leaders   Leaders

Service & Support

0   100

Singapore   Singapore
Non-Leaders   Leaders

Overall Leaders

Incisiv recognises these 5 brands as 2024 Unified Commerce Leaders.

Retailers listed in alphabetical order.

adidas	**CHARLES & KEITH**	**DIOR**	**NIKE**	**UNIQLO**
Apparel & Footwear	Apparel & Footwear	Luxury	Apparel & Footwear	Apparel & Footwear

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

Average revenue growth rate for retailers by rating category

● Revenue Growth %   ● Conversion % Median   ● Conversion % Maximum   ● Conversion % Minimum

	Laggards	Followers	Challengers	Leaders
Revenue Growth %	1.57	1.83	3.38	5.67
Conversion % Median	1.36	1.59	1.97	2.3
Conversion % Maximum	2.14	2.71	2.82	3.31
Conversion % Minimum	0.83	1.04	1.67	1.97
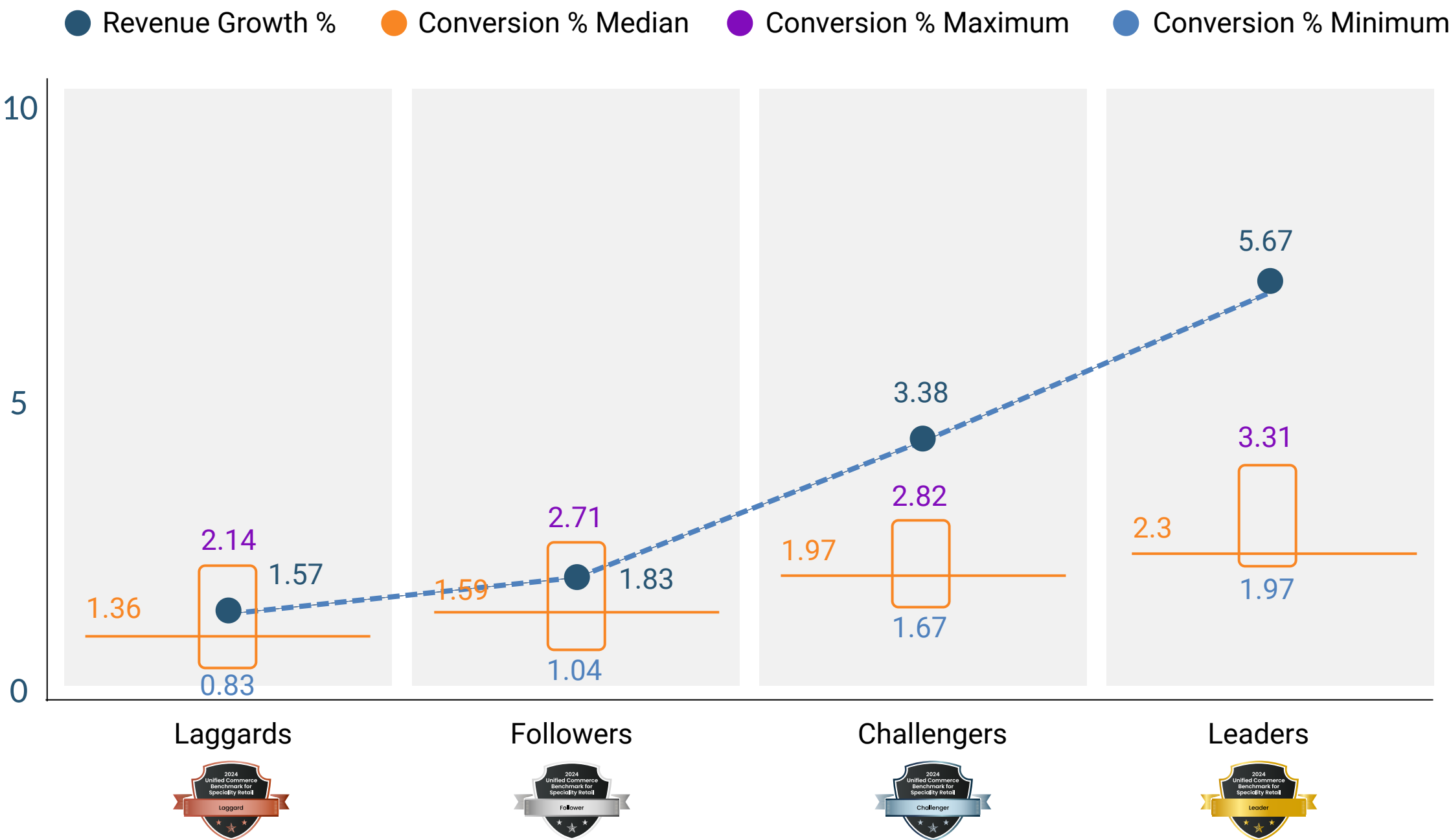
A specialty retailer currently rated a Challenger would stand to gain S$ 23 M per billion dollars in annual revenue by improving its Unified Commerce maturity to a Leader.

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.

Shopper Expectation

73%
Consider customer reviews as one of the leading purchase influencing factors

47%
Abandon their cart if the payment process is cumbersome

61%
Prefer online shopping due to seamless customer service

33%
Abandon a purchase if the return policy is inflexible

Leaders

60%

100%

40%

100%

Non-Leaders

26%
Provide detailed reviews and ratings

54%
Provide expedited (one-screen) checkout

18%
Offer customer service via text and social media channels

89%
Publish return policy on website

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

34% higher conversion rate for shoppers who initiate engagement with a retailer with a product search.

44% of shoppers will shop at another retailer if their desired product is out-of-stock.

21% 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 →
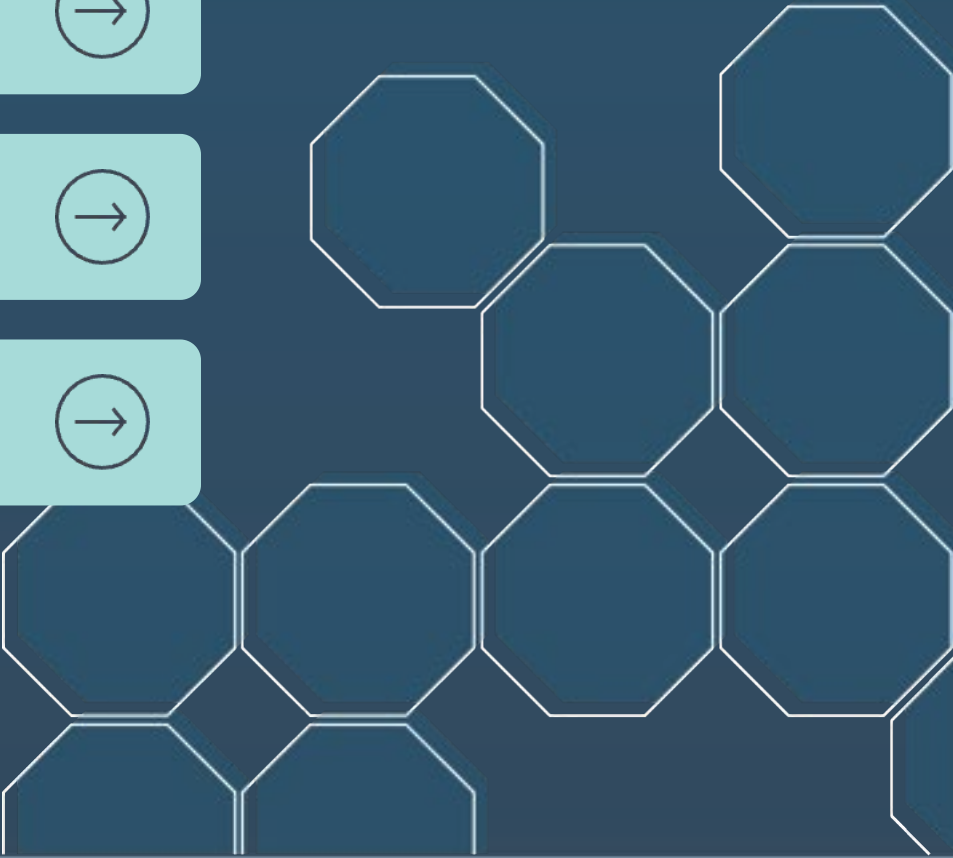
Leaders in Search & Discovery

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

Retailers listed in alphabetical order.

adidas	**CHARLES & KEITH**	**PUMA**	**UNIQLO**
Apparel & Footwear	Apparel & Footwear	Apparel & Footwear	Apparel & Footwear

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

93%

Non-Leaders

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

75%

Leaders

45%

Non-Leaders
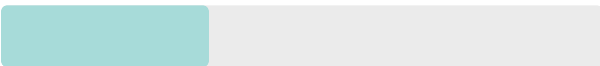
Product recommendations based on shopper activity

75%

Leaders

17%

Non-Leaders
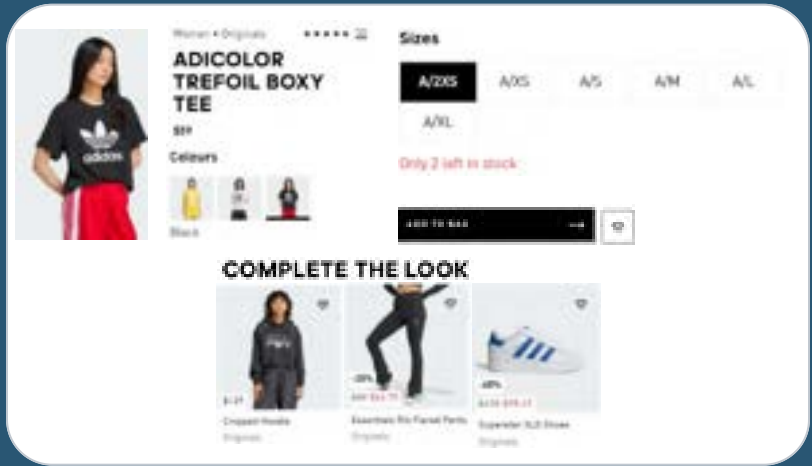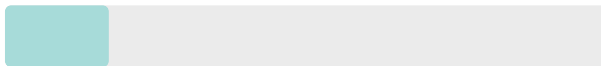
Personalised product exploration and inventory visibility.

60% of shoppers are likely to make repeat purchases with a brand after a personalised shopping experience. Personalisation, along with real-time inventory visibility, simplifies the purchasing process, customises discoveries, and nurtures loyalty.

Adidas provides real-time inventory statistics on the Product Detail Page (PDP) and offers product recommendations, including suggestions based on past purchases. Additionally, it offers category-specific and bundled product recommendations on the PDP.

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?

Option to opt for back-in-stock notifications on PDP

75%

Leaders

41%

Non-Leaders
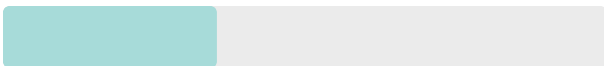
Product availability at store level

75%

Leaders

31%

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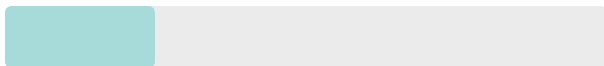
Inventory status callouts for low-stock or out-of-stock products

75%

Leaders

28%

Non-Leaders
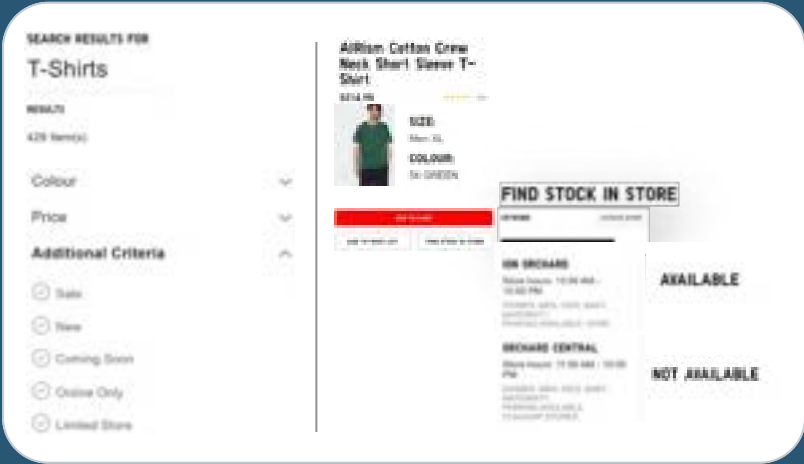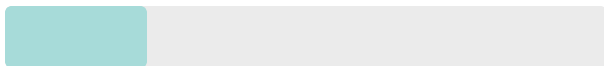
Enhancing online shopping experience with in-store inventory visibility.

38% of shoppers check online inventory availability before visiting a store, and 37% of them tend to switch to another brand if they encounter a stockout during their buying journey. Additionally, stock filters enable shoppers to exclude out-of-stock items. This not only enhances transparency during the search process but also significantly streamlines product discovery and reduces abandonment rates.

Uniqlo provides shoppers with insight into the availability of products at specific store locations and an extensive list of stock filters that enable shoppers to exclude items that are unavailable both in-store and online.

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

41%

Non-Leaders
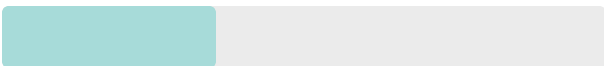
Responsible sourcing information and brand ESG practices

100%

Leaders

38%

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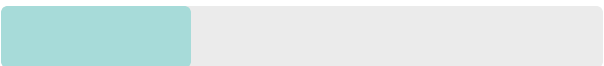
Ratings and reviews for specific product dimensions (size or fit)

75%

Leaders

24%

Non-Leaders
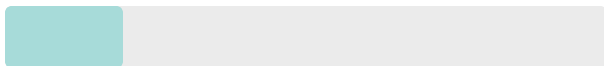
CHARLES & KEITH
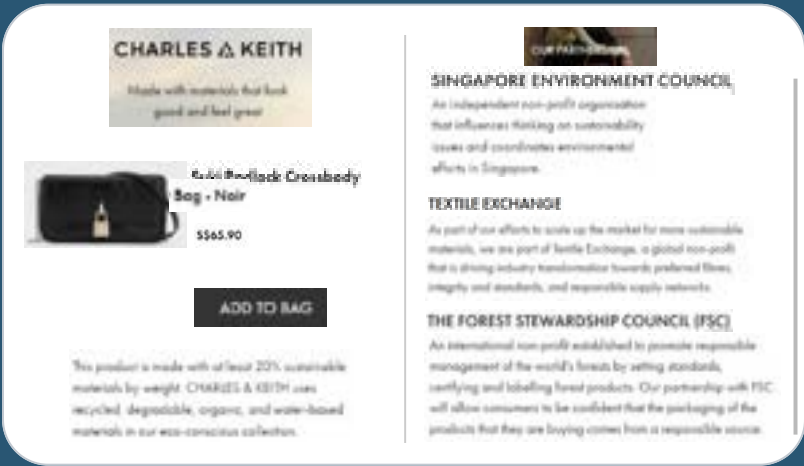
Purposeful commerce integrates cohesive experiences with sustainability.

34% of shoppers say that seeing a product marked as "sustainably made" or similar makes them more likely to purchase it. By highlighting items made from sustainable materials and partnering with organisations that promote sustainable practices, brands can instill a sense of satisfaction in shoppers with their purchases.

Charles & Keith has partnered with the Singapore Environment Council, Textile Exchange, and Forest Stewardship Council to drive sustainability initiatives. Each product includes comprehensive sustainability information on its product detail page and label.

Singapore Highlights

Leaders have a high adoption rate of customer experience capabilities like category-specific product recommendations, callouts for new arrivals and bestsellers, and sustainability information.

Key Gaps

The adoption of high-impact capabilities like filters for fulfilment methods or product availability at specific stores, real-time inventory visibility, AR/VR integration, and product sizing tools, is still low.
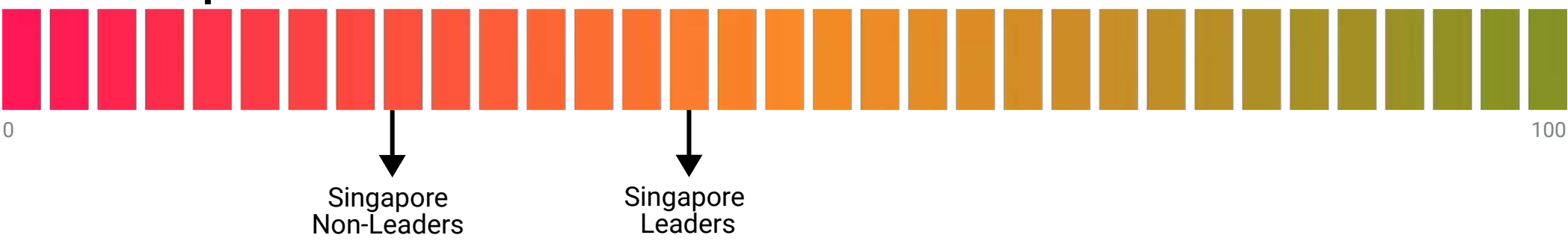
Search & Discovery

0   100

Singapore
Non-Leaders

Singapore
Leaders

Rich Findability

0   100

Singapore
Non-Leaders

Singapore
Leaders

Immersive Storytelling

0   100

Singapore
Non-Leaders

Singapore
Leaders

Guided Inspiration

0   100

Singapore
Non-Leaders

Singapore
Leaders
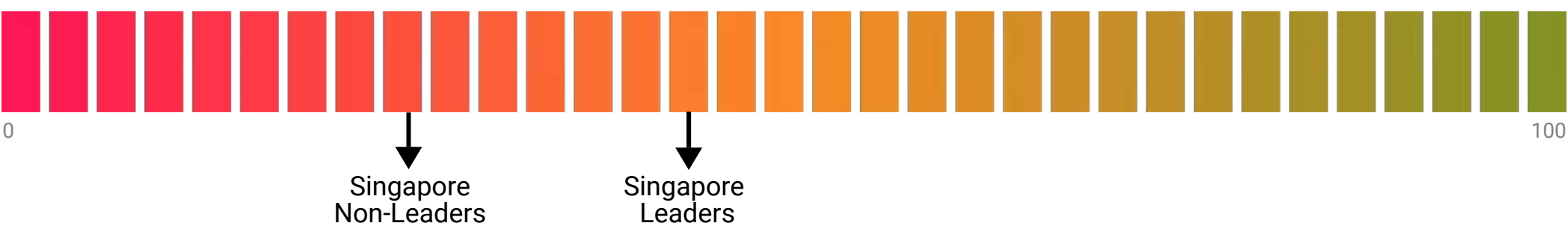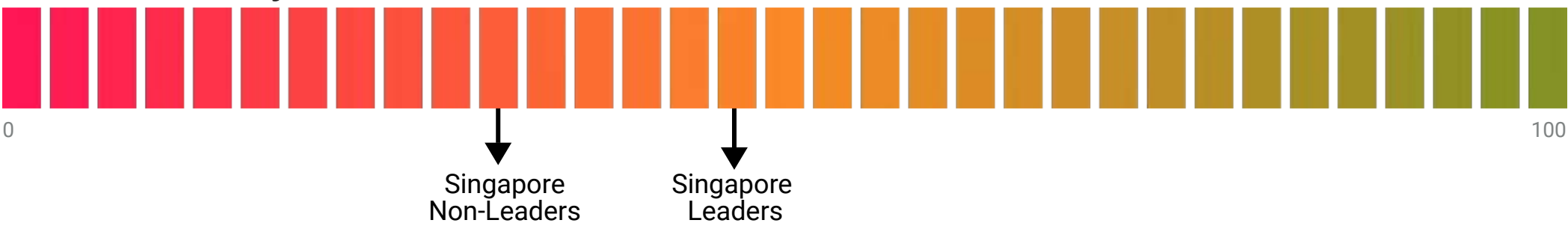
Leaders in Cart & Checkout

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 have a decidedly 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
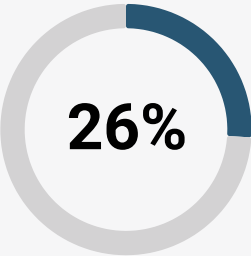
26% of shoppers say checkout is the #1 area retailers should fix to improve in-store experience.
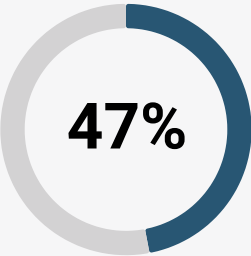
47% of shoppers abandon their shopping cart as they perceive the checkout process to be too long.
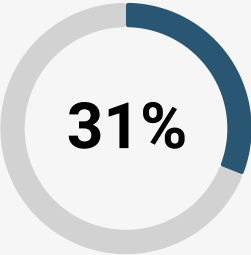
31% of shoppers will not retry if they have to re-enter the payment or delivery details.

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 4 brands as Leaders in Cart & Checkout.

Retailers listed in alphabetical order.

adidas	CHARLES & KEITH	LOVE BONITO	NIKE
Apparel & Footwear	Apparel & Footwear	Apparel & Footwear	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 connective tissue across channels. Even though a truly unified basket remains elusive, Leaders have made the most progress.

Move items from cart to wishlist and back

75%

Leaders

41%

Non-Leaders
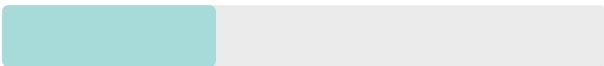
View and apply promotions and offers in cart

75%

Leaders

38%

Non-Leaders
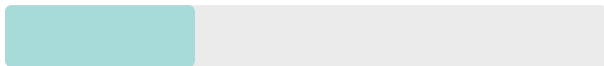
View store-wise availability & inventory change/out-of-stock details in cart

50%

Leaders

28%

Non-Leaders

Love, Bonito

My Shopping Bag (1)

Sree Knit V-neck Crop Top
Size: XS   Color: White
Price: US$ 29.00
1

Promo/Gift Card Code

New Member Welcome Offer
Join our loyalty program, LBCommunity+ and get a welcome offer on your first order online!
Enjoy 10% off with no min. spend, code: HELLOINTL10
T&Cs apply.
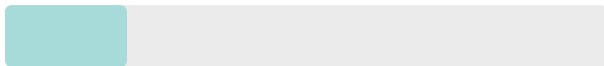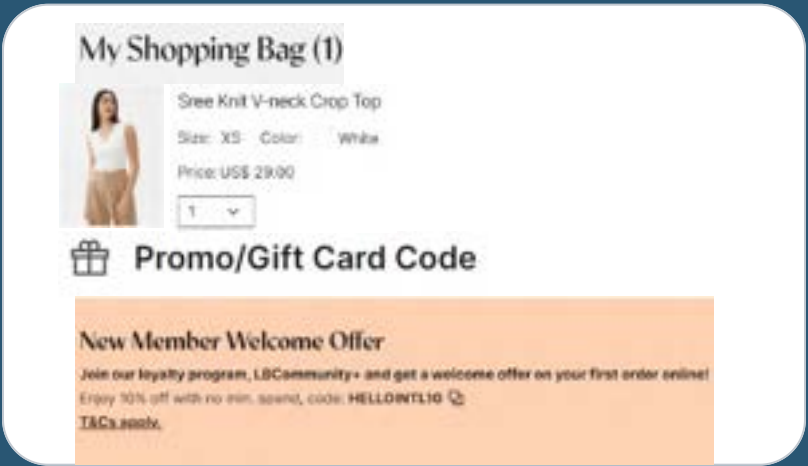
Ability to apply promo codes in cart along with clickable offers.

With nearly 96% of online shoppers ultimately making a purchase after browsing products, deals, and discounts, the pivotal role of promo codes in influencing consumer behaviour is underscored. Promo codes act as potent incentives, enticing shoppers with discounts and perks while also creating a sense of urgency and exclusivity.

Love, Bonito, incorporates applicable promo codes directly into the shopping cart, ensuring shoppers don't miss out on eligible promotions and discounts.

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.
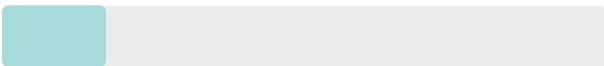
"Buy now, pay later" and "gift card" payment methods	**Loyalty points redemption for payments**	**Ability to use two or more payment methods for same order**
75%	**50%**	**25%**
Leaders	Leaders	Leaders
17%	**17%**	**7%**
Non-Leaders	Non-Leaders	Non-Leaders
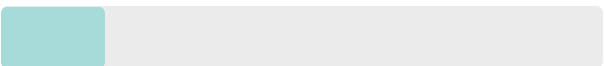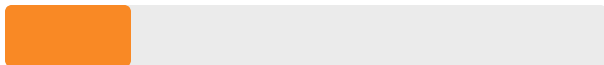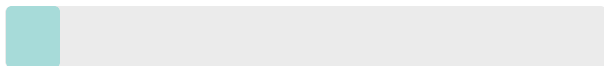
CHARLES & KEITH
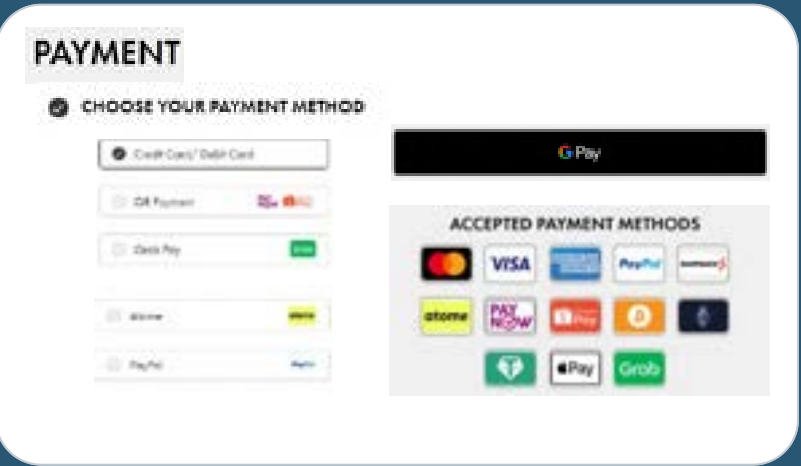
A variety of payment options for a convenient checkout experience.

By offering flexible payment options like Buy Now Pay Later (Atome), digital wallets such as Grab Pay, Google Pay, Apple Pay and PayPal, retailers can enhance convenience and accommodate the needs of different shoppers.

Charles & Keith offers Atome, a Buy Now Pay Later (BNPL) option and a variety of mobile payment options.

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%
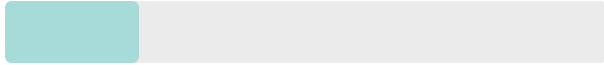
Leaders

55%

Non-Leaders

Ability to checkout using Google Pay or PayPal

75%

Leaders

28%

Non-Leaders

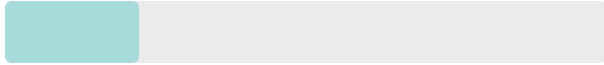## Ability to use regional mobile wallets such as GrabPay

50%

Leaders

28%

Non-Leaders
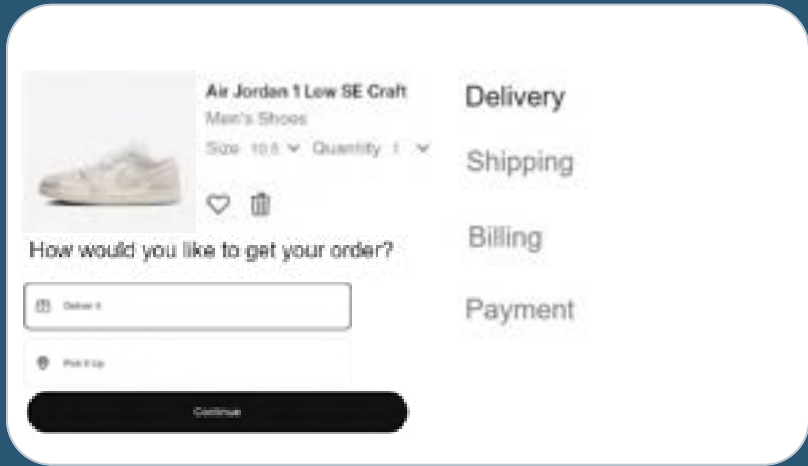
Streamlined payment processes through one-step checkout.

43% 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.

Nike 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: **Singapore Leaders vs Non-Leaders**

Singapore Highlights

Leaders have high adoption rate of customer experience capabilities like promo code activation in the shopping cart, facilitating expedited guest and one-step checkout, and providing diverse payment options like PayPal, gift cards or buy now, pay later.

Key Gaps

The adoption of some high-impact capabilities like clickable promo codes, the ability to pay at the store during pickup, as well as trade-in and recycling options, is still low.

Cart & Checkout

0   100

Singapore Non-Leaders   Singapore Leaders

Unified Basket

0   100

Singapore Non-Leaders   Singapore Leaders

Frictionless Checkout

0   100

Singapore Non-Leaders   Singapore Leaders

Payment Flexibility

0   100

Singapore Non-Leaders   Singapore Leaders

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

54% of shoppers value expedited delivery (same business day), but are only willing to pay S$10 as extra fee.

48% 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 3 brands as Leaders in Promising & Fulfilment.

Retailers listed in alphabetical order.

CHANEL	DIOR	HERMÈS PARIS
Luxury	Luxury	Luxury

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.

HERMES
PARIS

Access to free delivery regardless of order amount

67%

Leaders

20%

Non-Leaders
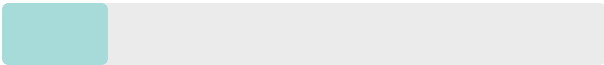
Option to pick-up orders from preferred stores/ship to store

67%

Leaders

30%

Non-Leaders
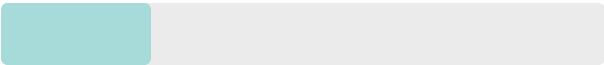
Option to compare estimated delivery dates for shortlisted products

33%

Leaders
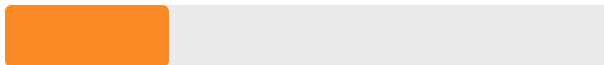
0%

Non-Leaders
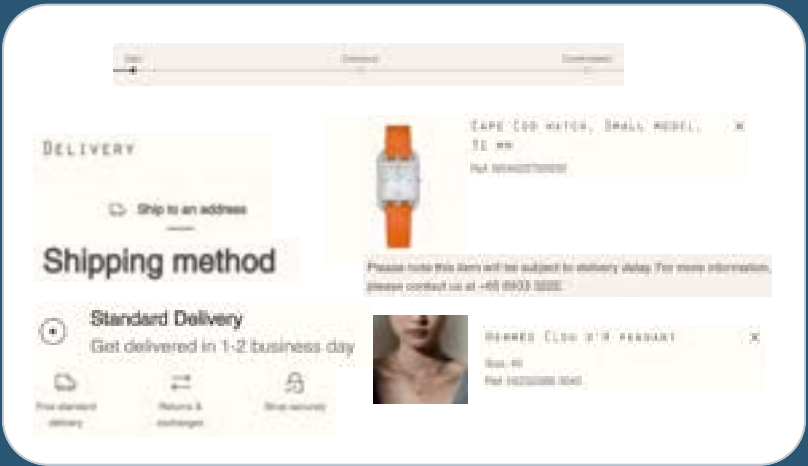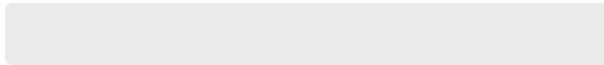
Ability to view estimated shipping dates, receive delay alerts and access free delivery options.

One-third of shoppers prefer services enabling swift domestic deliveries. Effective communication of estimated delivery dates and delays via customer service fosters trust, manages expectations, and boosts shopper satisfaction. Moreover, 48% of customers rank free delivery as a top priority when shopping online.

Hermes notifies shoppers of delivery delays and estimated delivery dates for each product unable to be delivered within the projected timeframe. Additionally, they provide free delivery regardless of the order size.

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. And they clearly communicate with shoppers in case a delivery estimate changes during the order process, helping build a higher degree of shopper confidence and trust.

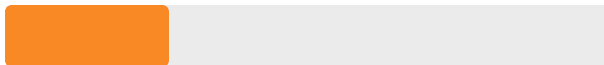### Order tracking via email/text and app/website channels

100%

Leaders

53%

Non-Leaders

Order cancellations post purchase

33%

Leaders

17%

Non-Leaders
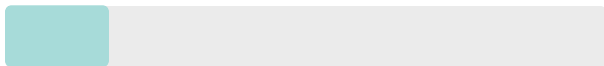
Regular order updates and notifications

100%

Leaders

37%

Non-Leaders
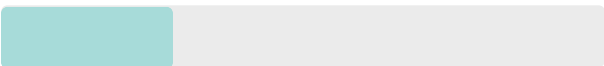
CHANEL

HOW CAN I TRACK MY ORDER?

A tracking link is provided in the e-mail you receive from us confirming the shipping of your order. If you have created an account, this link is also available on our website under My Account, then My Orders.

You will also receive a text and/or email from our carrier for all delivery methods.

For Ship to Store orders, you will receive a text and email from us once your order is ready collection at your selected boutique.

Order tracking via brands' own digital channel and real-time order updates.

Order tracking and status updates are important for shoppers during the delivery process. They provide transparency and assurance, allowing shoppers to monitor their purchases' progress and anticipate arrival times. This visibility enhances the overall shopping experience.

Chanel allows shoppers to track their orders and view real-time status updates, including key stages like "in preparation" and "shipping", ensuring a seamless and informed shopping experience.

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.
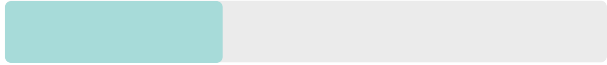
Ability to contact help desk for order modifications / cancellations

67%

Leaders
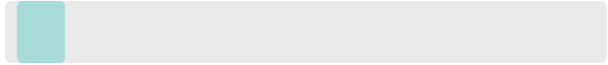
43%

Non-Leaders

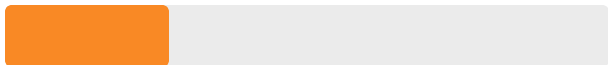## Sustainable product packaging

67%

Leaders

7%

Non-Leaders

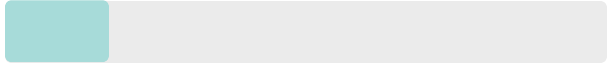## Real-time order pick-up notifications/alerts by store

33%

Leaders

17%

Non-Leaders

DIOR

BASKET(1)

Option to select sustainable packaging initiatives.

One in every three consumers prefer reusable packaging options if given the choice. Choosing reusable packaging offers a sense of empowerment, allowing individuals to actively participate in eco-friendly initiatives and reduce their carbon footprint.

Dior allows shoppers to select eco-friendly packaging options and highlights the environmental impact of their choice.

Promising & Fulfilment: **Singapore Leaders vs Non-Leaders**

Singapore Highlights

Leaders have a high adoption rate of customer experience capabilities like BOPIS (Buy Online, Pick Up In Store), order tracking via multiple channels and providing regular order updates.
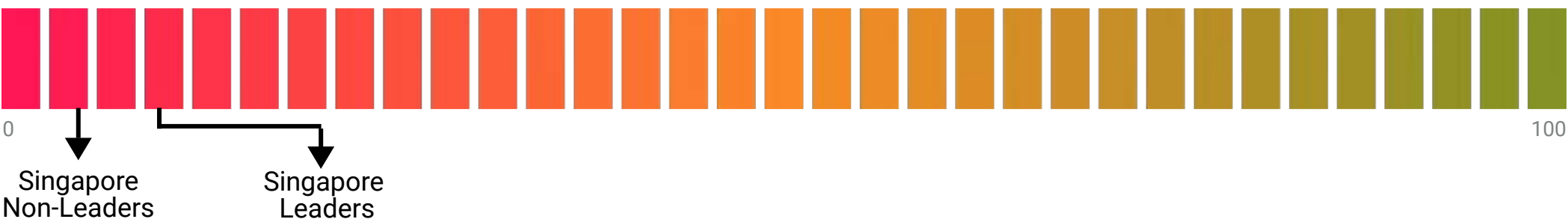
Key Gaps

The adoption of certain high-impact capabilities like sustainable fulfilment options, split delivery, locker pickup options and delivery scheduling is still limited.
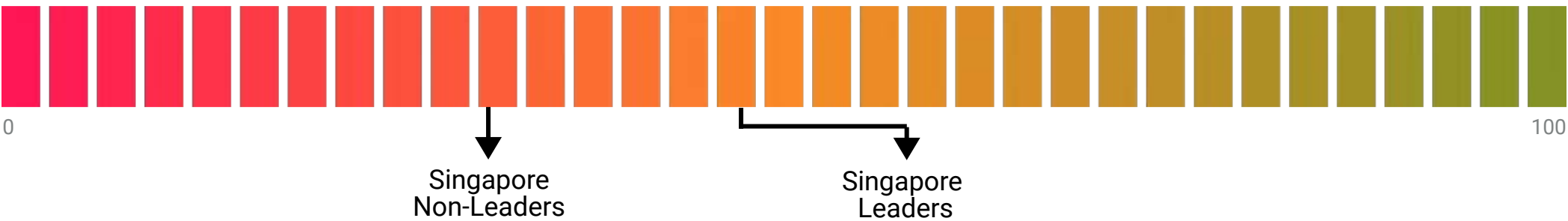
Promising & Fulfilment

0 — 100

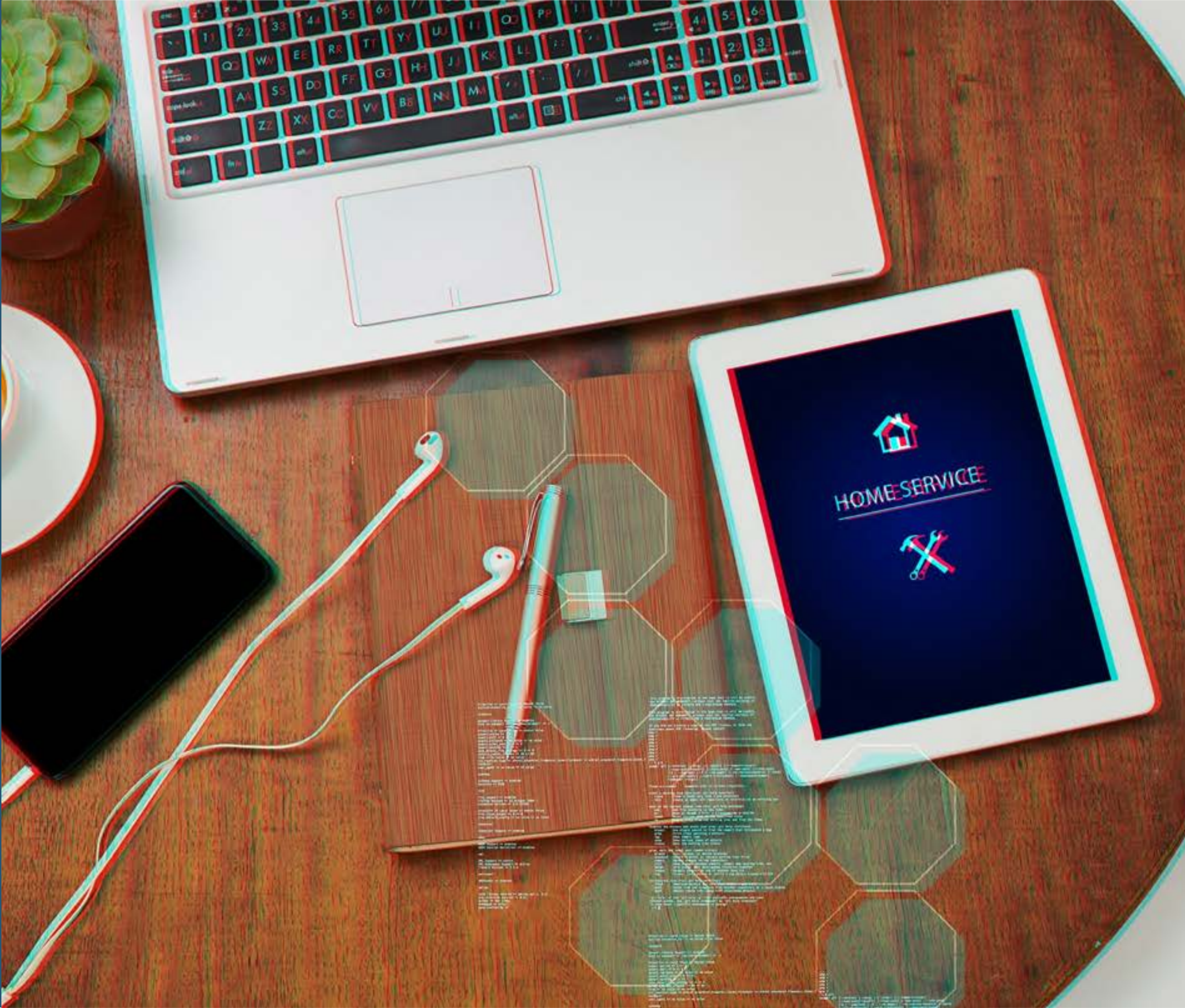Singapore Non-Leaders | Singapore Leaders

Ordering Flywheel

0 — 100

Singapore Non-Leaders | Singapore Leaders

Dynamic Promising

0 — 100

Singapore Non-Leaders | Singapore Leaders

Flawless Fulfilment

0 — 100

Singapore Non-Leaders | Singapore Leaders

Leaders in Service & Support

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.
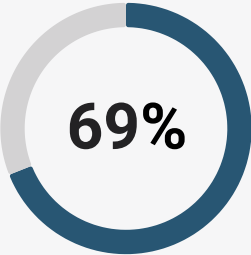
Why it matters
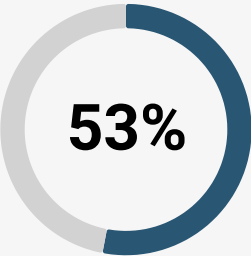
53% of shoppers say that retailers offer them a personalised shopping experience.
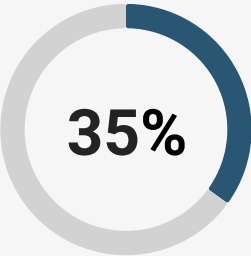
35% of shoppers find the refund and return process to be very time consuming.

69% 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 5 brands as Leaders in Service & Support.

Retailers listed in alphabetical order.

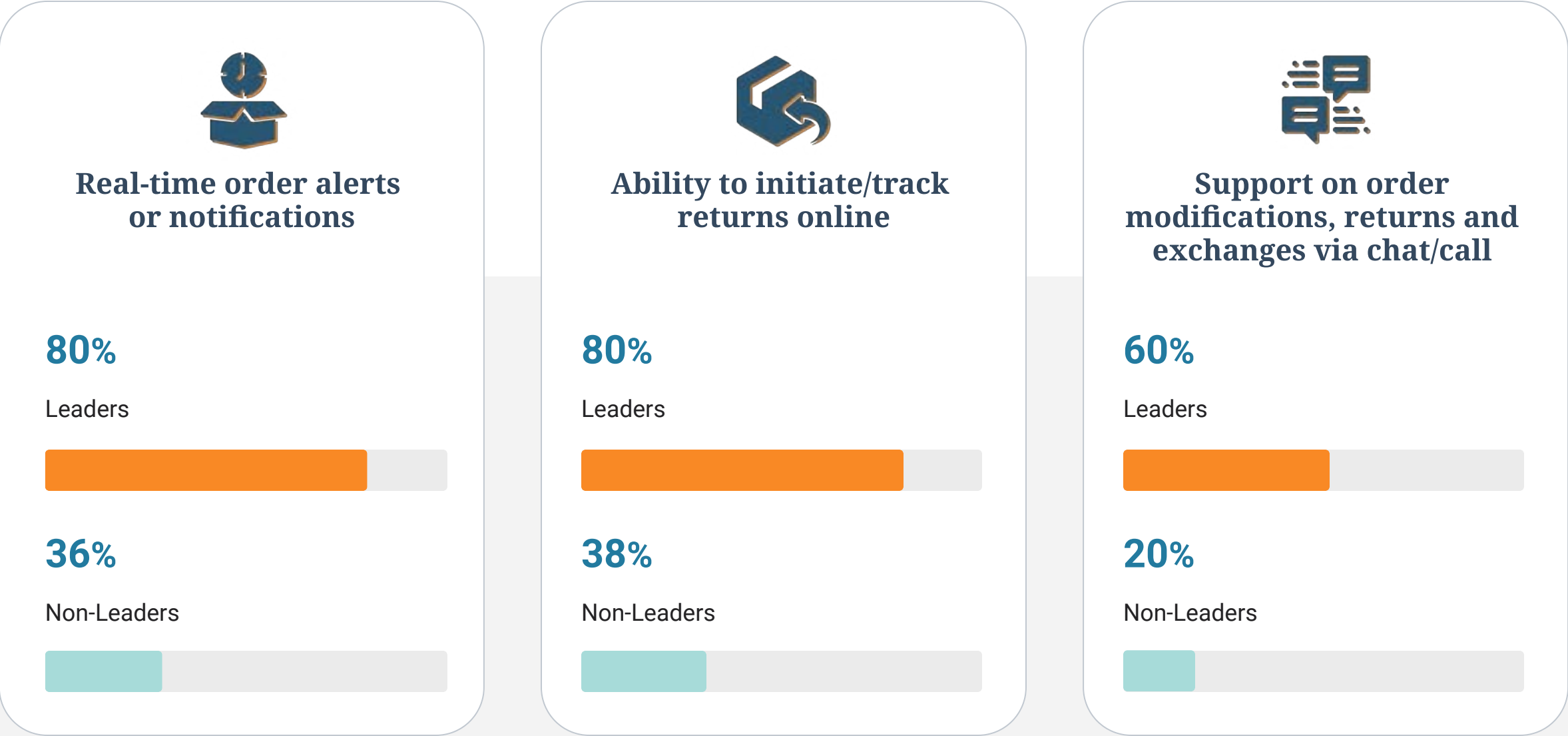| CHARLES & KEITH	fortytwo	HERMÈS PARIS	LOUIS VUITTON	NIKE
Apparel & Footwear	Home & DIY	Luxury	Luxury	Apparel & Footwear

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 alerts or notifications

80%

Leaders

36%

Non-Leaders

Ability to initiate/track returns online

80%

Leaders

38%

Non-Leaders

Support on order modifications, returns and exchanges via chat/call

60%

Leaders

20%

Non-Leaders

TRACK YOUR NIKE DELIVERY

After your order is dispatched, you can track your package(s) any time at Nike.com/orders. We'll also send you a delivery confirmation email with your tracking number and a link to track your package.

Where should I drop off my return?
You can choose to drop off with either SingPost or Ninja Van.

Can I track my return?
You can use the tracking number on your label to track your return.

Enhanced transparency through real-time order updates and return tracking.

Return tracking, combined with delivery updates, is crucial for shoppers. It provides transparency, allowing shoppers to monitor orders and returned items' progress and predict delivery, refunds or exchanges. This visibility ensures a smoother process for handling returns.

Nike enables shoppers to track returns using a tracking number provided on return labels, ensuring a hassle-free return experience.

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.
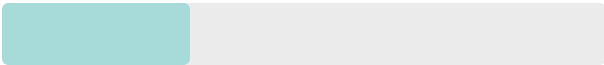
Support via live chat

80%

Leaders

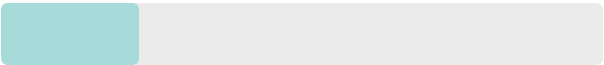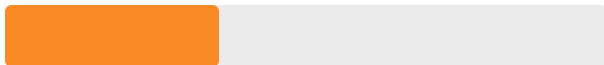**39%**

Non-Leaders

Support via social media channels

60%

Leaders

32%

Non-Leaders

Ability to return purchases to drop-off locations
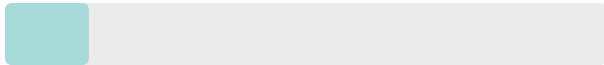
40%

Leaders

11%

Non-Leaders

HERMÈS PARIS

Customer Service
Whatsapp Singapore :+65 6933 3206
: Call : +65 6933 3222
Monday to Saturday: 09:00 am - 09:00 pm
Sunday: 12:00 pm - 09:00 pm

Welcome to Hermès! We are available to chat on Mondays to Saturdays from 10am to 8pm & Sundays from 12pm to 8pm (GMT+8). In the meantime, you may email us at service.sg@hermes.com and we will respond as soon as possible. Thank you and have a pleasant day.

Customer support via social media channel and live chat.

66% of shoppers consider messaging as their preferred mode of communication for support. Live chat and social media platforms offer retailers the chance to tailor their interactions with shoppers, allowing them to engage in real-time and address inquiries efficiently.

Hermes offers live chat and WhatsApp support, providing shoppers with instant help for a seamless support experience.

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.

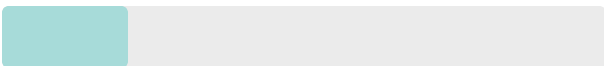### Guided purchase and product assistance by chat agents

80%

Leaders
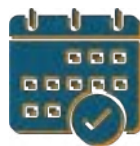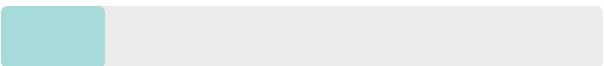
30%

Non-Leaders

Product personalisation or customisation

60%

Leaders

18%

Non-Leaders

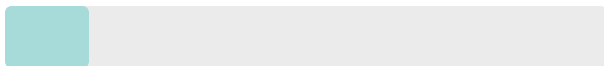### In-store appointment scheduling for product repairs/alteration

60%

Leaders

11%

Non-Leaders

LOUIS VUITTON
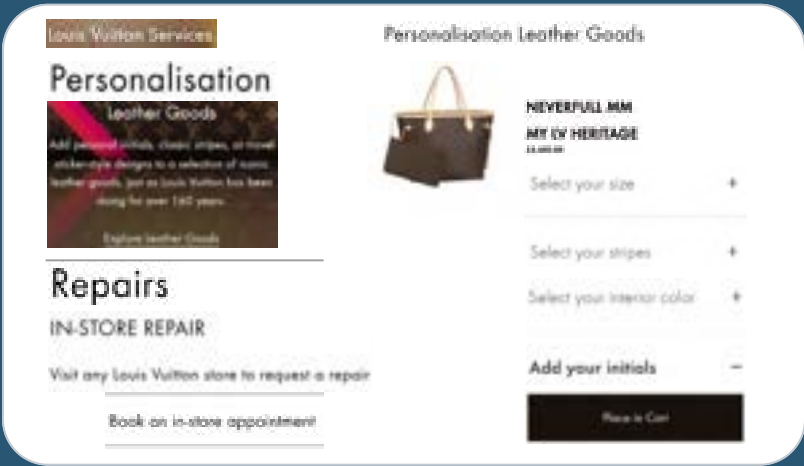
Tailored services: Personalised products and in-store repairs.

In-store appointments for repairs and product personalisation boost shopper satisfaction and loyalty by offering personalised attention, ensuring precise service, and bespoke customisation. This enhances product value and strengthens the shopper's connection to the brand.

Louis Vuitton offers shoppers the ability to personalise their purchases and visit stores for repairs. This enhances the overall shopping experience by providing tailored products and dedicated after-sales support.

Service & Support: **Singapore Leaders vs Non-Leaders**
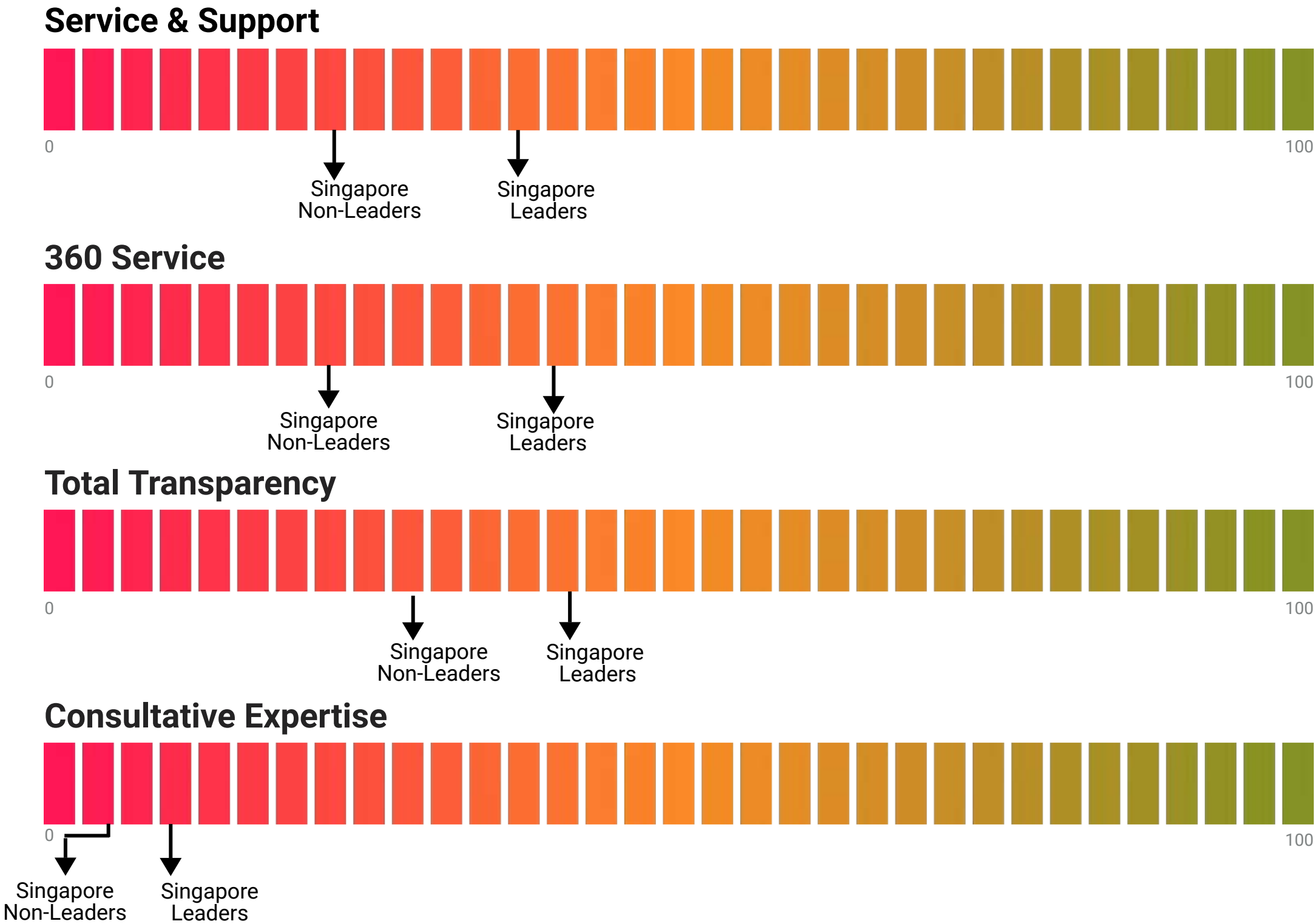
Singapore Highlights

Leaders have a high adoption rate of customer experience features like live chat, email and phone support, return tracking capability and streamlined assistance for product inquiries.

Key Gaps

The adoption of some high-impact capabilities like 24x7 live chat assistance, audio/video consultations, and store associates' ability to access inventory and omnichannel purchase history, is still low.

Service & Support

0   100

↓ Singapore Non-Leaders   ↓ Singapore Leaders

360 Service

0   100

↓ Singapore Non-Leaders   ↓ Singapore Leaders

Total Transparency

0   100

↓ Singapore Non-Leaders   ↓ Singapore Leaders

Consultative Expertise

0   100

↓ Singapore Non-Leaders   ↓ Singapore Leaders

Leaderboard

2024 Unified Commerce Leaders

adidas
Apparel & Footwear

CHARLES & KEITH
Apparel & Footwear

DIOR
Luxury

NIKE
Apparel & Footwear

UNIQLO
Apparel & Footwear
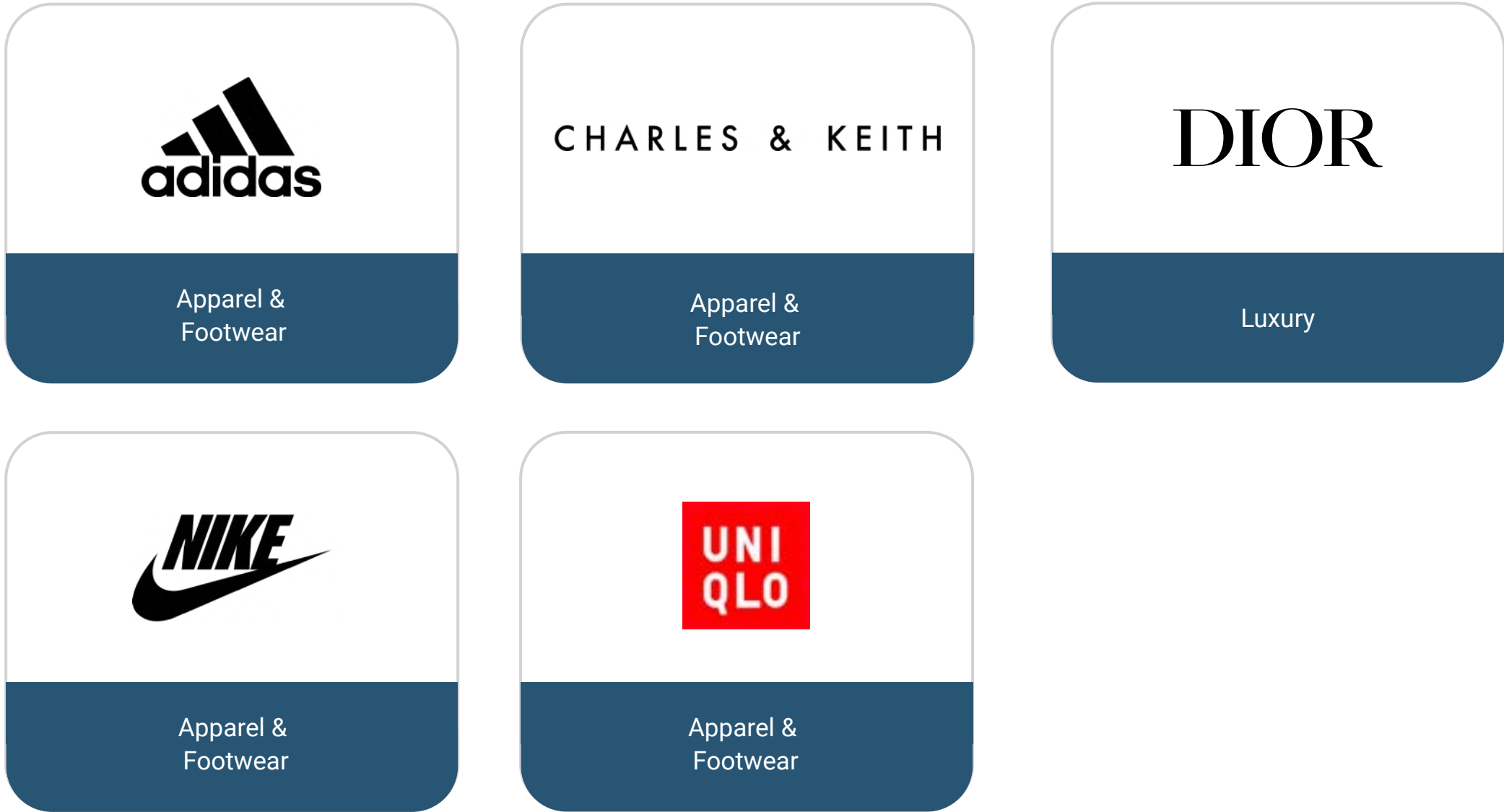
Dive Deeper

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

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.

incisiv.com

Manhattan

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.

www.manh.sg

Google Cloud

Google Cloud is widely recognised as a global leader in delivering a secure, open, intelligent and transformative enterprise cloud platform. Customers across more than 150 countries trust Google Cloud's simply engineered set of tools and unparalleled technology to modernise their computing environment for today's digital world.

cloud.google.com

ZEBRA

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.

zebra.com