2023 Benchmark
Unified Commerce for Specialty Retail
A new age of consumerism is reshaping commerce

A third of the US population is younger than Amazon. For them, one-click ordering, and fast and free shipping aren’t game-changers. They are just what’s expected from modern retail. Their combined life experience over the past thirty years has shaped a set of key expectations and behaviors that are driving the future of consumerism.

Source: US Census Bureau
Digital is default

Digital devices and apps are the lens through which modern-day humanity interacts with the physical world. From watching your favorite Netflix show on the subway, to playing your favorite Spotify playlist on an Uber ride, this digital nativism we all propagate has blurred the lines between the physical and the digital beyond recognition.

Shoppers don’t see “channels” the way retailers do. They simply shop. For brands, embracing a digital-first ethos doesn’t mean giving up on physical retail. It means amplifying each by fusing the two together seamlessly.

Convenience is a commodity

We are now in the age of hyper convenience, with 15-minute delivery for essentials through “Quick Commerce” players such as Gopuff and Gorillas. The likes of ASOS, Shein, and Wayfair offer free next-day delivery across a wide assortment of specialty retail segments.

Specialty retailers must reshape shopper expectations around convenience to be about more than just speed - offering a varied choice of payment and delivery options, for instance.

Importantly, they must differentiate on brand and customer experience to avoid competing on convenience alone - offering an overall experience that is as emotional as it is practical.

Virtue is a brand

As consumers passionately embrace new values - from environmental friendliness to social equity, holistic wellness to inclusive diversity - they expect their favorite brands to stand up and be counted.

Shopping is no longer a simple act of practical consumption. It is an opportunity for self-expression. Shoppers signal virtue through the choices they make, and demand that brands find a purpose beyond profit.

Brands can make commerce more responsible by helping shoppers find products that align with their value system, be transparent about their supply chain, educate shoppers about the environmental impact of various shipping options, and more.
Offering a truly unified experience is central to a retailer’s ability to differentiate

The traditional, linear path-to-purchase is dead
The idea of a “path-to-purchase” is inherently transactional. It is linear, with a beginning and an end. Brands that prioritize relationships over transactions should instead focus on building a “stream of engagement.” They must design experiences that allow shoppers to move from one need state to another seamlessly, and let them stop and start engagement at their own terms.

The customer experience still goes dark in the store
For decades brands have operated store and digital channels independently, with different eCommerce and point-of-sale platforms. While they have made significant strides in terms of integrating their digital and in-store experiences, it is in the critical transitions between the two that most still struggle.

Digital - physical unification requires a fundamental reset
A lack of foundational capabilities to tie digital and physical experiences together means retailers lose important context when shoppers move from one channel to another, which in turn introduces avoidable friction across the shopper journey.
2023 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.

124 retailers benchmarked across 11 specialty retail segments.

280+ customer experience capabilities tested across 4 capability areas.
Meticulous Benchmarking Methodology

Unified Commerce Assessment Framework
Incisiv first developed a detailed parameterized 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 organized key capabilities into Table Stakes and Differentiating Experiences.

Store & Digital Experience Audits
Incisiv developed an objective list of 124 retailers across 11 specialty retail segments. We chose a mix of top omnichannel retailers by revenue, and top Digital Native Vertical Brands (DNVBs) by store count. 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 physical and in-person 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 quality of experience.

Based on their score, brands were organized 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 286 customer experience capabilities across the following four functional areas. The number of attributes assessed in each area is provided in parentheses.

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

- **Cart & Checkout (61)**
  Order personalization, inventory visibility, checkout and payment options, order pickup and returns

- **Promising & Fulfillment (42)**
  Availability, speed, cost and convenience of fulfillment

- **Service & Support (103)**
  Resolution, returns, customer assistance, loyalty program and account management

Capabilities are categorized 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 fulfillment type is a differentiating experience.

Each capability is mapped either as Table Stakes or as a Differentiating Experience. Incisiv’s framework also takes into account variance in relative importance of a capability across various specialty retail segments.
Incisiv developed an objective list of 124 retailers across 11 specialty retail segments. We chose a mix of top omnichannel retailers by revenue, and top Digital Native Vertical Brands (DNVBs) by store count. 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 center agents, interacted with virtual agents via chat, and used the retailer’s mobile app.

The benchmark assessment was conducted between October 2022 and February 2023. 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).
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.
Overall Leaders
Overall Leaders

Incisiv recognizes these 15 brands as 2023 Unified Commerce Leaders.

Retailers listed in alphabetical order.
Unified Commerce Leaders’ revenue growth outperforms Non Leaders 3X - 6X

Average revenue growth rate for retailers by rating category

A specialty retailer currently rated a Challenger would stand to gain ~$40M per billion dollars in annual revenue by improving its Unified Commerce maturity to a Leader.
DNVBs are conspicuously absent from the overall Leaders category. This is largely due to them still scaling store operations, and underperforming in a few critical Promising & Fulfillment capabilities. This should not be mistaken for a lack of recognizable performance. DNVBs lead the way in a few differentiating Unified Commerce capabilities, specifically in Search & Discovery, and Service & Support.

DNVBs also have strong foundational capabilities around product and brand storytelling, store format innovation, unified customer profile, guided selling both in-store and online, and innovative in-store merchandising.

There is much to learn for both omnichannel retailers and DNVBs from each other.
Differentiation is moving from the basic to the nuanced

Most retailers now offer at least some basic unification of the customer experience across channels. As the general standard of customer experience rises across the board, being good enough will no longer be good enough.

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

Most retailers now offer basic capabilities:
- Inventory availability on Product Detail Page (PDP) - 94%
- Product recommendations on PDP - 95%
- Order tracking on retailer's digital channel - 93%
- Store associates can access product and inventory details - 93%

Few offer nuance and depth of experience:
- Real-time inventory statistics on PDP - 29%
- Personalized product recommendations based on purchase history - 20%
- Real-time order status alerts, communication about delays - 28%
- Store associates can access shoppers’ purchase history and wishlist - 38%
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 personalized 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.** 33%
- **of shoppers will shop at another retailer if their desired product is out-of-stock.** 37%
- **of shoppers are satisfied with their preferred retailer’s sustainability practices.** 20%

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 need 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 consistency of information about when an item is expected back in stock

Key findings in this section

- Guided Inspiration
- Rich Findability
- Immersive Storytelling
Leaders in Search & Discovery

Incisiv recognizes these 15 brands as Leaders in Search & Discovery.

Retailers listed in alphabetical order.
Guided Inspiration

Leaders help shoppers discover meaningful products - whether they are looking to fulfill 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 personalization, best-in-class, in-store assisted selling, and excellent online and in-store merchandising.

- **Personalized recommendation on home page**
  - **50%** Leaders
  - **20%** Non Leaders

- **Real-time inventory visibility on PDP**
  - **60%** Leaders
  - **25%** Non Leaders

- **AR/VR tools (try-on / sizing) on PDP for virtual product experience**
  - **35%** Leaders
  - **29%** Non Leaders

- **Magazines or catalogs that offer product suggestions**
  - **47%** Leaders
  - **33%** Non Leaders

61% of shoppers say they are overwhelmed by product assortment online, find it difficult to navigate to the right product, or the right fit for the occasion. 55% say the product’s actual look, feel, and fit is very different compared to the images online.

UNTUCKit provides multiple ways for a shopper to find ‘that look’, or the most meaningful product. From a detailed four-step fit finder, to virtual assistance through store experts, to collections by occasion, weather or time - UNTUCKit guides and inspires shoppers’ exploration.
Search & Discovery: Leader Insights

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 color if it is out of stock?

Expansive search filters for a simplified product discovery experience.

Product filters allow shoppers to hone in on a specific category, sub-category, or item(s), enabling more efficient discovery. Only 50% of retailers offer nuanced, category-specific filters. Athleta offers more than 10 filters, including fulfillment options, category specific, product usage and product attributes such as length, material, size and color.

Filters by fulfillment method

<table>
<thead>
<tr>
<th></th>
<th>Leaders</th>
<th>Non Leaders</th>
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<tbody>
<tr>
<td>80%</td>
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<td>21%</td>
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Option to opt for back-in stock notifications on PDP

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<tr>
<th></th>
<th>Leaders</th>
<th>Non Leaders</th>
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<td>47%</td>
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<td>40%</td>
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Inventory status callouts for low stock/out-of-stock products

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<thead>
<tr>
<th></th>
<th>Leaders</th>
<th>Non Leaders</th>
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<tbody>
<tr>
<td>43%</td>
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<tr>
<td>33%</td>
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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.

Product sourcing information on PDP

100%
Leaders
89%
Non Leaders

Publish detailed content on sustainability practices

87%
Leaders
58%
Non Leaders

Ratings and reviews for specific product dimensions (size, fit) on PDP

87%
Leaders
62%
Non Leaders

Promote sustainable products on Product Listing Page (PLP) and PDP

60%
Leaders
37%
Non Leaders

Purposeful commerce through digital and in-store experience.

40% of shoppers are actively looking for, and willing to spend more for sustainable, and ethically sourced products. From sharing fair-wage practices at their (or their partners’) factories, to highlighting products sourced from minority-operated partners - brands can make shoppers feel good about their purchase.

Allbirds places a strong focus on its sustainability story - both online and in store. A sustainability deep-dive, and its “rerun” marketplace for used goods feature prominently on its site. Each product has detailed sustainability information on the PDP.
Luxury retailers see the impact of direct-to-consumer and “quiet luxury” brands.

Luxury retailers have a lot of catching up to do as far as providing a rich Search & Discovery experience is concerned. This is an area they must benchmark themselves against those beyond their immediate peer group, by specifically looking to emulate the experience provided by emerging or refreshed direct-to-consumer brands in luxury or luxury-adjacent segments.

<table>
<thead>
<tr>
<th>Ability to narrow product search by filtering using available fulfillment or delivery method</th>
<th>Low inventory or out-of-stock label on the search listing page</th>
<th>Information on sourcing and carbon footprint</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>58%</strong>&lt;br&gt;Department Stores</td>
<td><strong>58%</strong>&lt;br&gt;Department Stores</td>
<td><strong>71%</strong>&lt;br&gt;Cosmetics &amp; Skincare</td>
</tr>
<tr>
<td><strong>28%</strong>&lt;br&gt;Retail Average</td>
<td><strong>35%</strong>&lt;br&gt;Retail Average</td>
<td><strong>38%</strong>&lt;br&gt;Retail Average</td>
</tr>
</tbody>
</table>

**Search & Discovery: Segment Insights**

*Valextra*

Italian “quiet luxury” brand **Valextra** guides shoppers through a curated selection via its digital and print journal, and a prominently featured “Get Inspired” section on its website.

*Loro Piana*

LVMH-owned **Loro Piana** offers shoppers a rich search experience, including voice search, trending categories, and featured store and online exclusives.
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 cart and wishlist so the burden is not on shoppers to do all the work again.

Why it matters

- 40% of shoppers say that checkout is the #1 area retailers should focus on in order to improve in-store experience.
- 26% of shoppers abandon their shopping cart because they perceive the checkout process to be too long.
- 37% of shoppers will not retry if they have to re-enter their payment or delivery details.

What we assess

We assessed 42 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 recognizes these 14 brands as Leaders in Cart & Checkout.
Retailers listed in alphabetical order.
The biggest point of friction in today’s retail customer experience is due to the loss of context when transiting 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.

Check product availability status by store in cart view

- **93%** Leaders
- **53%** Non Leaders

Ability to see available promo codes in cart view

- **64%** Leaders
- **55%** Non Leaders

Personalized promotions and offers displayed on PDP and cart view

- **33%** Leaders
- **29%** Non Leaders

Store inventory and past purchase visibility for a unified shopping experience.

50% of shoppers say that retailers only personalize market messages, not the customer experience. One big stumbling block towards achieving this in-store is the lack of a unified cart and profile that would help customers and store associates seamlessly carry context from one channel to another.

**Camping World** unifies the shopping experience online and in-store by making comprehensive store inventory visibility and customer purchase history available on a mobile device for store associates.
# 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 therein.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Leaders</th>
<th>Non Leaders</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Buy now, pay later” availability</td>
<td>93%</td>
<td>82%</td>
</tr>
<tr>
<td>Loyalty points redemption for payments</td>
<td>86%</td>
<td>52%</td>
</tr>
<tr>
<td>Ability to use mixed payment methods for same order</td>
<td>50%</td>
<td>26%</td>
</tr>
</tbody>
</table>

40% of shoppers prefer payment flexibility, including the ability to use a combination of modes to pay for an order. The ability to use more than one payment option makes the checkout process smoother for shoppers, and improves customer satisfaction.

*Aerie* allows shoppers to use up to three gift cards or a combination of gift cards and credit cards to pay for an order.
Frictionless Checkout

Addressing in-store and online cart abandonment is a huge revenue opportunity for retailers. A majority of cart abandonment occurs due to 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

Shoppers look for fast and convenient checkout options. 30% of shoppers will abandon the cart if the checkout involves multiple steps and involves long text forms. Cuyana offers a single-step checkout option where shipping details are pre-populated and all payment-related information can be entered in one step.
No one specialty retail segment emerges as a leader consistently across various aspects of the Cart & Checkout experience value chain.

Here's a look at which industry segments have the highest adoption of key differentiating capabilities from product customization to express checkout.
2023 Unified Commerce Benchmark for Specialty Retail

Leaders in Promising & Fulfillment
Promising & Fulfillment: Overview

Promising & Fulfillment 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 color or size?

Why it matters

- **60%** of shoppers value expedited delivery (same business day), but are only willing to pay a maximum of $5 as extra fee.
- **77%** of shoppers prefer to use a subscription based model to get their essentials delivered.
- **62%** 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 fulfillment 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 incentivize sustainable delivery and pick-up choices?

Key findings in this section

- Ordering Flywheel
- Dynamic Promising
- Flawless Fulfillment
**Leaders in Promising & Fulfillment**

Incisiv recognizes these 14 brands as Leaders in Promising & Fulfillment.

Retailers listed in alphabetical order.

<table>
<thead>
<tr>
<th>Apparel - Fast Fashion</th>
<th>Sporting Goods &amp; Outdoor</th>
<th>Apparel - Lifestyle</th>
<th>Apparel - Lifestyle</th>
<th>Department Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abercrombie &amp; Fitch</td>
<td>Academy Sports + Outdoors</td>
<td>American Eagle Outfitters</td>
<td>Anthropologie</td>
<td>Belk</td>
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<tr>
<td>Apparel - Lifestyle</td>
<td>Home Furnishing</td>
<td>Sporting Goods &amp; Outdoor</td>
<td>GAP</td>
<td>Macy’s</td>
</tr>
<tr>
<td>Crate &amp; Barrel</td>
<td>Dick’s Sporting Goods</td>
<td>Apparel - Fast Fashion</td>
<td>Nordstrom</td>
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<td>Jewelry</td>
<td>Luxury</td>
<td>Cosmetics and Skincare</td>
<td>Sephora</td>
<td>UGG</td>
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<tr>
<td>Apparel - Footwear</td>
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Promising & Fulfillment: Leader Insights

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.

Mixed delivery option (home delivery / in-store) for same order

- **57%** Leaders
- **25%** Non Leaders

Order cancellations or modifications post purchase

- **57%** Leaders
- **25%** Non Leaders

Option to ship orders to store

- **43%** Leaders
- **18%** Non Leaders

Ability to select different fulfillment options within the same order.

54% of shoppers say that the delivery timelines and fulfillment options are key decision influencers while purchasing on a retailer’s digital channel.

Allowing shoppers to split fulfillment methods for orders offers them greater flexibility, and saves them time, improving retention rates and encouraging repeat purchases.

**Academy Sports** offers select split-shipping options (in-store pickup, home delivery) for the same order transaction.
Promising & Fulfillment: Leader Insights

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 ready for pickup within the expected/mentioned timelines

- 64% Leaders
- 36% Non Leaders

Compare estimated delivery dates of items in cart

- 21% Leaders
- 7% Non Leaders

Delivery timelines basis destination zipcode/fulfillment methods in cart view

- 36% Leaders
- 7% Non Leaders

View, choose and manage delivery option for each item in the cart.

77% of shoppers say they prefer options to select delivery method (speed, cost, channel). Only 38% of retailers provide the option to select fulfillment option by item in cart view.

Belk provides multiple fulfillment options (e.g. pick-up, delivery) along with delivery timelines for each item, and also allows shoppers to revisit their fulfillment method at an item level in the cart.
Promising & Fulfillment: Leader Insights

Flawless Fulfillment

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.

Option to change shipping method from BOPIS to direct shipment
- 93% Leaders
- 60% Non Leaders

Receiving delivery as per the expected timelines
- 93% Leaders
- 61% Non Leaders

Sustainable product packaging
- 86% Leaders
- 58% Non Leaders

Option to change fulfillment options.
55% of customers prefer the option to schedule delivery and 40% prefer the option to change fulfillment method post order confirmation or even shipping. Only 15% of retailers provide the option to change fulfillment method post order confirmation. Sephora enables allows shoppers to get BOPIS orders shipped to home in case they are unable to pick it up from the store. In addition, Sephora also offers sustainable packaging for its products and orders.
### Promising & Fulfillment: Segment Insights

<table>
<thead>
<tr>
<th>Sustainable product packaging</th>
<th>Delivery scheduling and last mile tracking</th>
<th>Order tracking and notifications</th>
<th>Delivery with promise time</th>
<th>Order modification post confirmation</th>
</tr>
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<tbody>
<tr>
<td><strong>92%</strong> Cosmetics &amp; Skincare</td>
<td><strong>56%</strong> Home Furnishing</td>
<td><strong>97%</strong> Cosmetics &amp; Skincare</td>
<td><strong>92%</strong> Cosmetics &amp; Skincare</td>
<td><strong>50%</strong> Apparel - Lifestyle</td>
</tr>
<tr>
<td><strong>61%</strong> Retail Average</td>
<td><strong>8%</strong> Department Stores</td>
<td><strong>72%</strong> Retail Average</td>
<td><strong>64%</strong> Retail Average</td>
<td><strong>18%</strong> Retail Average</td>
</tr>
<tr>
<td><strong>40%</strong> Apparel - Intimates</td>
<td><strong>8%</strong></td>
<td><strong>60%</strong> Atmosphere</td>
<td><strong>18%</strong> Luxury</td>
<td><strong>0%</strong> Sporting Goods</td>
</tr>
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</table>

- **Highest Adoption**
- **Lowest Adoption**
2023 Unified Commerce Benchmark for Specialty Retail

Leaders in Service & Support
Service & Support: Overview

Service & Support refers to the set of retailer capabilities and experiences related to offering shoppers personalized 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 center associates to deliver authenticity.

Why it matters

- 15% of shoppers say that retailers offer them a personalized service experience.
- 41% of shoppers find the refund and return process to be very time consuming.
- 51% of shoppers prefer 24*7 availability of customer support.

What we assess

We assessed 103 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 personalized 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 recognizes these 11 brands as Leaders in Service & Support.
Retailers listed in alphabetical order.
Service & Support: Leader Insights

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 center associates.

Option to track returns for online orders.
Shoppers expect near real time updates at key point of purchase and return process. 96% 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.

H&M allows shoppers to track returns for products purchased online, including alerting the shopper when the return is accepted, and when refund is processed.
Service & Support: Leader Insights

360-Degree Service

Leaders offer shoppers a wide variety of service options - from in-store assistance to call centers, 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 text/social media channels

- 32% Leaders
- 18% Non Leaders

Availability of 24x7 live chat support

- 30% Leaders
- 12% Non Leaders

Option to return in-store purchases online

- 36% Leaders
- 27% Non Leaders

Customer support via social media platforms.

64% of shoppers prefer messaging a brand over calling for support. Social media platforms provide retailers with the opportunity to personalize their interactions with shoppers. Moreover, they save time for shoppers looking for quick responses to their queries.

Tecovas offers unified customer support with both self-service and assisted order modifications, including the ability to initiate returns, exchanges and repair requests. It also offers product information and support via social media and live chat. The store associates use iPads to help any queries and also to checkout customers.
Consultative Expertise

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

Mejuri uses stores as a hub of unmatched service.

From personalized piercing experiences to in-store styling appointments, Mejuri uses its brick-and-mortar stores as an entry point into its brand. It is heavily focused on connecting shoppers with local store teams directly, even offering an “order by phone” option where shoppers can speak with an in-store associate, pay over the phone, and have the order ready for pick-up within two hours.
Service & Support: Segment Insights

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage</th>
<th>Industry</th>
<th>Segment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Return store purchases online</td>
<td>42%</td>
<td>Jewelry</td>
<td></td>
</tr>
<tr>
<td>Customer service on social media: Twitter, Facebook, Instagram</td>
<td>50%</td>
<td>Apparel - Fast Fashion</td>
<td></td>
</tr>
<tr>
<td>Store associates have access to shopper’s cart and past purchases</td>
<td>92%</td>
<td>Apparel - Lifestyle</td>
<td></td>
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<tr>
<td>Agents are able to provide detailed product information</td>
<td>100%</td>
<td>Luxury</td>
<td></td>
</tr>
<tr>
<td>Store associates have access to shopper’s cart and past purchases</td>
<td>68%</td>
<td>Apparel - Athleisure</td>
<td></td>
</tr>
<tr>
<td>Agents are able to provide detailed product information</td>
<td>88%</td>
<td>Apparel Intimates</td>
<td></td>
</tr>
<tr>
<td>Return store purchases online</td>
<td>27%</td>
<td>Retail Average</td>
<td></td>
</tr>
<tr>
<td>Customer service on social media: Twitter, Facebook, Instagram</td>
<td>20%</td>
<td>Retail Average</td>
<td></td>
</tr>
<tr>
<td>Store associates have access to shopper’s cart and past purchases</td>
<td>40%</td>
<td>Retail Average</td>
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</tr>
<tr>
<td>Agents are able to provide detailed product information</td>
<td>70%</td>
<td>Apparel Intimates</td>
<td></td>
</tr>
<tr>
<td>Store associates have access to shopper’s cart and past purchases</td>
<td>0%</td>
<td>Cosmetics &amp; Skincare</td>
<td></td>
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</tbody>
</table>

- **Highest Adoption**: Green
- **Lowest Adoption**: Red
Leaderboard
Speciality retailers have the opportunity to learn from the finding of this exclusive benchmark.

**Benchmark Your Unified Commerce 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 personalized walkthrough.
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Manhattan designs, builds and delivers innovative solutions for stores, transportation networks and fulfillment centers, eliminating silos created by legacy commerce, warehouse, and transportation systems to create seamless operations and optimal efficiency.

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