

Country Playbook

2024 Unified Commerce Benchmark for Specialty Retail in Europe

UK

Country Playbook: UK

2024 Unified Commerce Benchmark

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Unified Commerce
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2024 Unified Commerce Benchmark
Country Playbook: UK

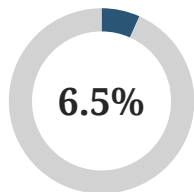
Market Perspective



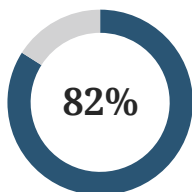
Market Perspective

Specialty retail sales in the UK are projected to grow at a CAGR of ~3.1% from 2022-2028 to an overall market size of €156.6 billion, from €130.4 billion in 2022. The growth is driven by increase in Luxury goods and apparel sales.

Specialty retail brands across sub-segments: Apparel & Footwear, Home & DIY and Luxury are making significant investments in shoring up their digital capabilities across customer engagement, order inventory visibility, fulfilment, sustainable practices and personalised shopping experiences, both online and in-store.



projected CAGR (2022-2028) for online specialty retail sales in the UK.



of all shopper journeys for specialty products in the UK now begin online.



4 in 5

shoppers have a strong preference for sustainable and ethically sourced products.



3 in 5

shoppers in the UK are willing to pay extra for a personalised shopping experience.

Digital is default.

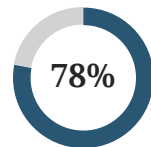
Shoppers are increasingly turning to digital platforms for inspiration, product comparisons and making purchases for all specialty retail segments. The seamless integration of both digital and physical experiences holds great importance as shoppers actively seek personalised interactions with brands at every stage of their shopping journey.

Convenience is a commodity.

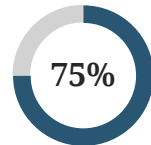
As convenience becomes a key factor in specialty retail, brands must go beyond fast delivery and offer hassle-free end-to-end experience. They should reshape shopper expectations by offering differentiating digital capabilities and services that cater to their diverse needs and preferences. This can be achieved by the right balance of efficient self-service and emphatic human touch.

Virtue is a brand.

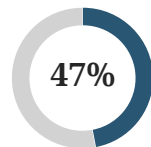
Today's specialty shoppers are increasingly conscious of the impact their choices have on the environment and society. They expect brands to demonstrate commitment to sustainability, ethical practices and social equity.



of specialty shoppers in the UK use digital channels to research products.



of shoppers in the UK prefer self-service options for order modifications and cancellations.



of shoppers in the UK are more likely to purchase a product with recyclable packaging.

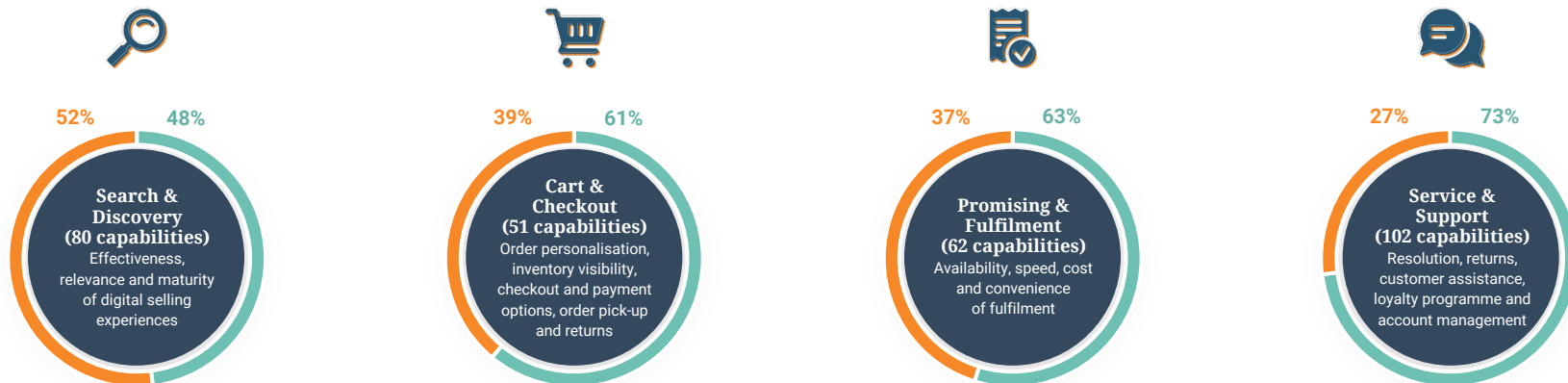
2024 Unified Commerce Benchmark
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Unified Commerce Benchmark Overview

Country Playbook: UK



2024 Unified Commerce Benchmark Index for Specialty Retail in Europe



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

This Country Playbook is based on insights from the 2024 Unified Commerce Benchmark for Specialty Retail in Europe, Incisiv's in-market shopper and executive research and from aggregate data analysis of the retailers that were assessed as part of the benchmark [Learn more about the Index here.](#)

50

retailers benchmarked across multiple specialty retail segments.

13

retailers chosen from the 50 for curated insights in Country Playbook.

290+

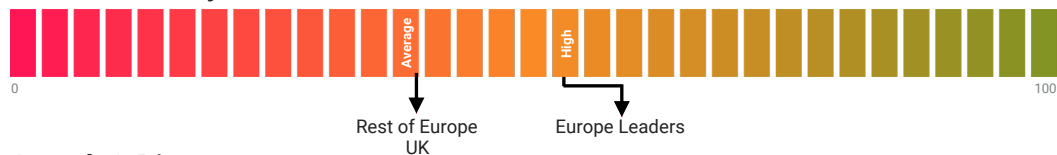
customer experience capabilities assessed in both peer and industry segments.

Country Maturity

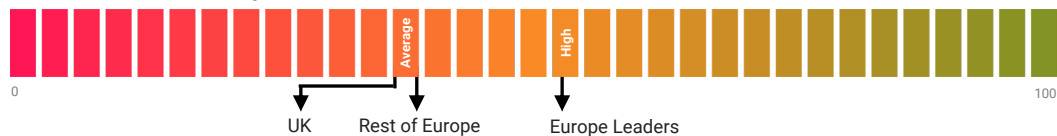
Specialty retailers in the UK have the same Overall Unified Commerce Maturity as other retailers accessed in France, Germany, Italy and Netherlands. Key observations and recommendations include:

- **Build on strengths:** Focus on enhancing Service & Support, where performance is closer to the Europe Leaders. Improve customer service by offering comprehensive omnichannel support and in-store/online consultations.
- **Transform Promising & Fulfilment:** For the UK retailers, this is the capability area with the lowest maturity. Retailers should prioritise operational efficiency by providing enhanced fulfilment options and transparency and adopting sustainable packaging/shipping practices.
- **Upgrade Search & Discovery and Cart & Checkout:** Retailers in the UK must focus on streamlining the search process through advanced product findability and sustainability initiatives. They must aim for a simplified checkout process with features like expedited checkout and enhanced inventory visibility in the cart to provide a more seamless experience.

Overall Maturity



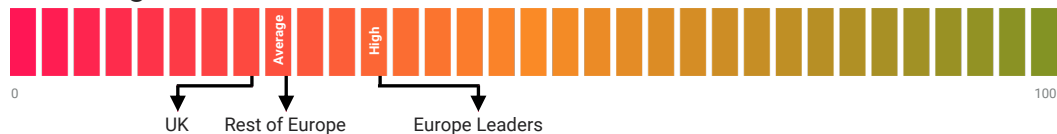
Search & Discovery



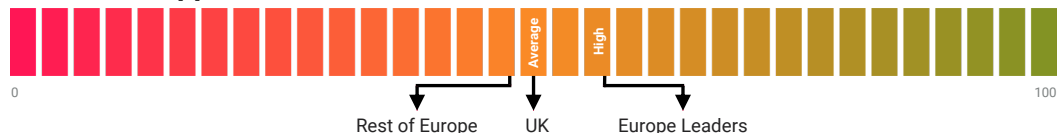
Cart & Checkout



Promising & Fulfilment



Service & Support





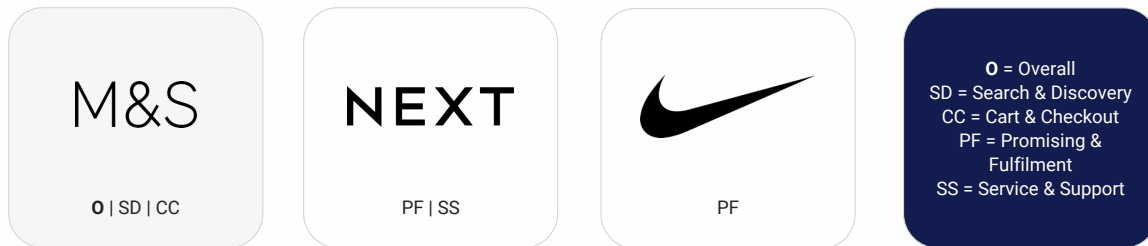
UK Leaders

Incisiv recognises these 3 brands as Leaders in the 2024 Unified Commerce Index across all rating categories.

The Index includes a complete Leaderboard spanning 50 retailers across multiple specialty retail segments. Leaderboards are provided at both an overall and capability area level.

[Learn more.](#)

UK Retailers Rated as Leaders, in Alphabetical Order



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Search & Discovery

Country Playbook: UK



Why it matters.

Search & Discovery entails creating personalised shopping experiences based on shopper intent. Whether they are looking for a particular item or exploring a new brand, it is essential to enhance the discoverability of products in order to make the customer journey seamless.

71% of shoppers

in the UK expect to view in-store inventory online and 73% indicate they are "likely" or "very likely" to visit a store if the inventory is available for online viewing.

49% of shoppers

in the UK state that customer reviews on the internet are highly beneficial and 14% say that they are excited to use AR/VR technology, while shopping online.

Only 18% of shoppers

in the UK feel they receive personalised brand communications based on the products they view or the content they engage with.

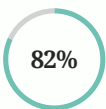
What Leaders do well.

Leaders are succeeding in search and discovery by providing bundled product offerings, real-time inventory details, reviews and highlighting fulfilment options on the product display page.

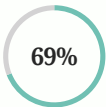


Standout capabilities.

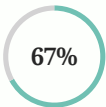
Specialty retailers in the UK excel in search and discovery, providing enhanced transparency with responsible sourcing details and a commitment to brand sustainability. The advanced product visibility, featuring callouts for new arrivals, trending items and category-specific recommendations, along with a detailed inventory view, enriches the shopping experience.



Enhanced transparency: responsible sourcing information and brand's sustainability initiatives



Detailed inventory view: product availability status online and at specific store locations



Advanced product visibility: callouts for new arrivals, trending products and category-specific/bundled product recommendations

Improvement opportunities.

To enhance search and discovery, specialty retailers in the UK can incorporate augmented/virtual reality, refine advanced findability through effective filters and create an endless aisle experience with targeted callouts and restock notifications. These improvements align with evolving customer expectations for a dynamic and efficient discovery process.



Augmented/virtual reality experience



Advanced findability: filter products by availability status, sustainability or fulfilment method



Endless aisle experience: callouts for low stock/out-of-stock products, product restock notifications

Spotlight: Shopper Symphony

Retail leaders prioritise crafting an exceptional shopping experience by employing effective merchandising strategies, promoting transparency in product inventory, offering virtual shopping experiences, implementing sustainable practices and fostering personalised, in-store connections. This approach enriches the shopping journey and empowers customers to make well-informed decisions.

M&S



M&S COLLECTION
Soft Touch Ribbed Roll Neck Jumper
Cappuccino, Size Extra Small

Hurry, only 1 left!

POPULAR
16 others have looked at this recently



Find in store

Brent Cross Shopping
Centre (5.6
mi)
7 in stock

Real-time inventory visibility for simplified shopping

46% of shoppers check inventory visibility online before making a purchase and 38% of them do so before visiting a store, underlining the importance of real-time inventory visibility. This not only enhances transparency in the search process but also significantly simplifies product discovery.

M&S allows shoppers to access real-time inventory data, including total views and units sold. It also provides visibility into the stock available at individual stores and issues notifications on PDP when only a limited quantity remains in stock.

BURBERRY



Paddy Bag
Colour: Archive Beige £790

Add to Bag

Wear this with



Bundled product offerings for an enhanced shopping experience

91% of shoppers are more likely to shop with brands that provide relevant offers and recommendations. As consumer preferences constantly evolve, making personalised recommendations, such as bundled product offerings, helps create a frictionless shopping experience and also elevates the average order value (AOV).

Burberry enables shoppers to view bundled product suggestions, recommending which items a particular product can be paired with, making the search process effortless.

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Cart & Checkout



Why it matters.

Cart & Checkout encompasses the capabilities and experiences retailers offer to assist shoppers in making informed purchase decisions. In order to facilitate a smooth journey from product selection to successful purchase completion, ensuring a seamless shopping experience is paramount, particularly when shoppers transition between physical and digital channels.

Over 47% of shoppers

in the UK are interested in buying customised items, but only 20% are willing to pay a premium for personalised products.

43% of shoppers

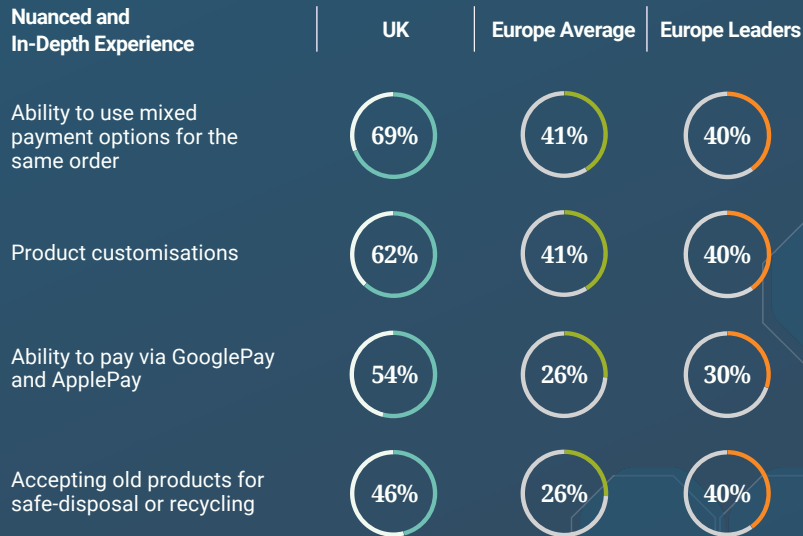
in the UK state that personalised communications regarding offers or deals for items in their cart can influence their brand preference.

70% of shoppers

in the UK recently used ApplePay for making payments at a POS setting, while 39% used it for making online payments.

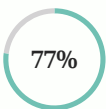
What Leaders do well.

Leaders offer seamless cart and checkout experiences with features such as customisations, the option to pay using different payment methods at checkout and product recycling options. These flexible features help make the checkout process convenient and effortless.

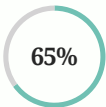


Standout capabilities.

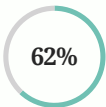
Specialty retailers in the UK distinguish themselves in the checkout process by providing effortless promo code application and versatile payment choices such as PayPal, Apple Pay, Google Pay, gift cards, or the option to combine multiple methods. The personalised checkout experience is further enhanced through advanced ordering features, allowing customisation to meet individual preferences.



View and apply promo codes at checkout



Flexible payments: PayPal, Apple Pay, Google Pay, gift card or combine multiple payment options for same order



Advanced ordering: product/order customisation or personalisation

Improvement opportunities.

Specialty retailers in the UK can enhance the shopping experience by introducing innovative brand services such as pre-order and improving brand communications for products left in cart. Expanding payment options to include payment links, mobile wallets, or direct bank transfers offers added convenience.



Brand communications for products left in cart or inventory availability status at checkout



Expanded payment options: the ability to pay via payment link, mobile wallets or direct bank transfer



Ability to pre-order out-of-stock or newly launched products

Spotlight: Optimised Checkout

Retailers need to seamlessly integrate the offline and online experience to enhance customer satisfaction. Leading retailers are advancing in establishing a unified view of shoppers' cart, endorsing the resale and recycling of old items, offering customisation and providing flexible payment options to fortify customer relationships.

Clarks



HELP CLOSE THE LOOP WITH CLARKS

Promoting environmentally conscious shopping through recycle and resale

34% of shoppers state that brands gaining recognition as ethical or sustainable helps increase their trust. As consumer preferences evolve and the appeal of circular fashion grows, an increasing proportion of shoppers now consider sustainability a pivotal factor in their purchasing decisions.

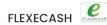
Clarks is leading the way with its sustainability initiatives. It has a special 'ShoeShare' takeback programme that allows shoppers to donate or recycle shoes at Clarks stores. Additionally, Clarks also features various 'consciously crafted' products made from sustainable or recycled materials.

The Edinburgh Woollen Mill 



ADD PROMOTIONAL CODE

ADD GIFT CARD



+

+

Enhancing convenience with versatile payment options

58% of shoppers in the UK would cancel an order if the payment procedure is too complicated. Providing customers with a range of payment options streamlines their shopping experience, enabling swift and immediate transactions. Moreover, enabling customers to utilise multiple payment methods enhances the checkout process, ensuring secure and effortless payments.

The Edinburgh Woollen Mill enhances shopper comfort by permitting payments with gift cards and promo codes, alongside card payments and other methods.

Promising & Fulfilment



Why it matters.

Promising & Fulfilment encompasses the range of capabilities and interactions retailers employ to offer shoppers convenient fulfilment options and accurate order commitments. Throughout the shopping journey, retailers need to provide vital information related to ordering and delivery, fostering shopper trust and enhancing the likelihood of successful conversions.

61% of shoppers

in the UK would not make a purchase if delivery costs are too high.

54% of shoppers

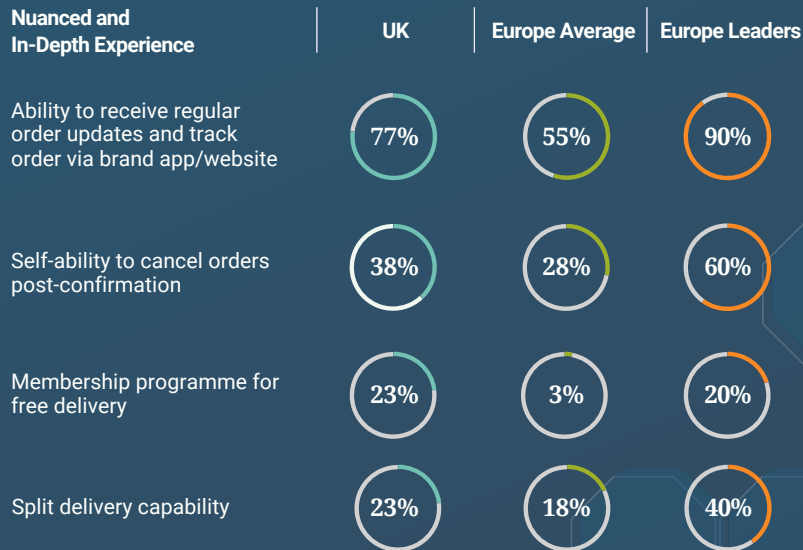
in the UK, check order updates sent via email.

63% of shoppers

in the UK have considered subscribing to programmes that offer certain delivery perks.

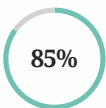
What Leaders do well.

Leaders are revolutionising the fulfilment experience by offering a flywheel of fulfilment options: split delivery capabilities, order cancellations, membership programmes for free delivery and the ability to track orders via the brand's own digital channel. These customer-centric features set them apart and provide a level of convenience and flexibility that is unparalleled in the industry.

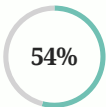


Standout capabilities.

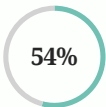
Specialty retailers in the UK demonstrate excellence in promising and fulfilment services with standout capabilities such as real-time order visibility, proactive communications, sustainable product packaging and the option to select fulfilment methods. These capabilities contribute to a seamless and customer-centric shopping experience, emphasising transparency and sustainability.



Real-time order visibility and status tracking with proactive communications



Sustainable product packaging



Order transparency: view/select fulfilment method on PDP and at checkout

Improvement opportunities.

Specialty retailers in the UK can enhance the promising and fulfilment experience by offering flexible options like pick-up from collection points or in-store ordering for home delivery. Increased ordering flexibility, allowing customers to modify orders post-confirmation, adds convenience. Prioritising sustainable choices and sharing carbon footprint information aligns with environmentally conscious practices.



Flexible fulfilment options: pick-up from collection points or order in-store for home delivery



Ordering flexibility: modification (post-confirmation)



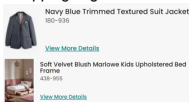
Sustainable choices: carbon footprint by delivery methods

Spotlight: Streamlined Fulfilment

Retail leaders aim to create a frictionless fulfilment process by providing alternative delivery methods, prioritising sustainability initiatives to reduce carbon footprint, establishing proactive communication and implementing post-order flexibility. This demonstrates their commitment to enhancing customer experiences and addressing evolving customer expectations.

NEXT

Shopping Bag



GO TO CHECKOUT

Order Value
Excluding UK Standard Delivery (Normally £4.95)
Free Delivery To Store (Subject to Availability)
FREE Delivery With [GLOVEDELIVER](#)

Your order has been split into Store Collection and Home Delivery

The following item(s) cannot be collected from this store and will be delivered to your chosen home address.

- Marlowe Kids Upholstered Bed Frame 418-985

We need you to confirm some delivery details below. Home Delivery will be charged at the standard £9.95.

2 Person Delivery

In Stock



CAN I CANCEL OR CHANGE MY NIKE ORDER?

You can't make changes to an order, but you can cancel it within 15 minutes of placing it. If you don't see the cancel button, your order can't be cancelled. But don't worry—you can [return items](#) within 30 days.

To cancel an order, go to your [orders page](#) and open the order. Next, tap or click the "Cancel" button and follow the prompts. If you're not signed in, you'll need to enter the order number found in your confirmation email, along with your email address.

[VISIT ORDERS PAGE](#)

Split fulfilment and delivery scheduling capability

44% of shoppers prefer multiple fulfilment options. The flexibility not only grants customers control over their deliveries but also addresses concerns about product availability. Offering options tailored to speed, cost and delivery timelines fosters loyalty and positively influences purchase decisions.

Next allows shoppers to use multiple fulfilment methods for the same order and also offers delivery scheduling capability.

Order cancellation post-confirmation

Granting online shoppers the ability to cancel orders post-confirmation is a customer-centric approach that enhances satisfaction. It acknowledges the dynamic nature of consumer preferences, providing flexibility in decision-making. This feature instils a sense of control for customers, reducing concerns about potential regrets or errors in their purchase choices.

Nike allows order cancellations post-confirmation for a short time period.

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Service & Support



Why it matters.

Service & Support moulds a positive purchasing journey with tailored solutions, highlighting effective self-service and prompt human assistance. Exceptional service not only impacts immediate purchases but also fosters enduring loyalty. Omnichannel capabilities guarantee a seamless support experience, enriching customer engagement across touchpoints.

56% of shoppers

in the UK expect retailers to arrange and cover the cost of return pick-up.

78% of shoppers

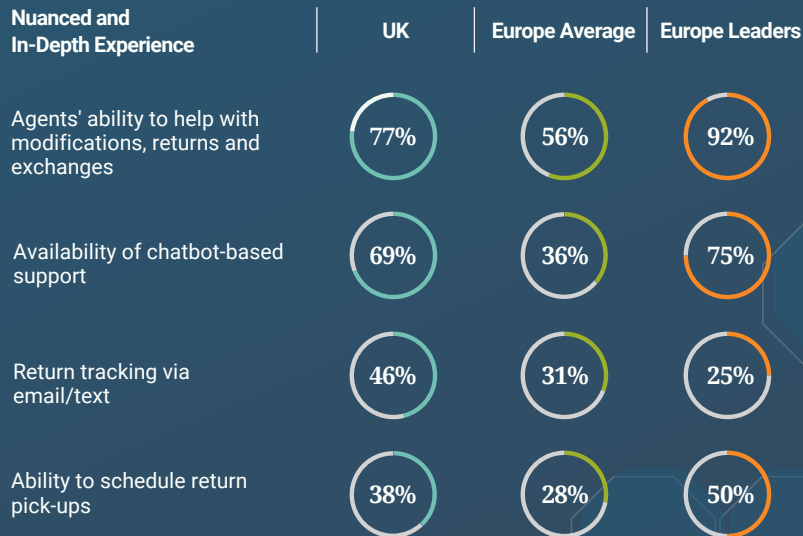
in the UK will revisit a brand if they are satisfied with the service and support.

29% of shoppers

in the UK are willing to pay extra enhanced excellent customer service.

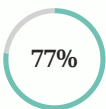
What Leaders do well.

Leaders are enhancing customer experience through convenient return scheduling and tracking options, exhaustive support on multiple shopper queries and virtual assistance for shoppers.



Standout capabilities.

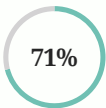
Specialty retailers in the UK stand out in service and support, offering flexible return options through online, in-store, or chat/call initiation. With accessible support via email, call, live chat, or virtual assistant, customers receive assistance promptly. Live agent support for various queries, including product information, payments, order modifications, returns and exchanges, further elevates the customer experience.



Flexible returns: initiate online, in-store returns or initiate returns via chat/call



Support via email, call, live chat or virtual assistant



Live agent support on product information, payments, order modifications, returns and exchanges

Improvement opportunities.

Specialty retailers in the UK can elevate the service and support experience with advanced return options, including convenient return drop-offs. Personalising the in-store experience by allowing associates to view purchase history adds a tailored touch. Additionally, refining personalised interactions with brand experts, whether virtually or in-store, deepens engagement for a unique support experience.



Advanced return options: drop off products at UPS or post office



Personalised in-store experience: associates' ability to view shopper's purchase history, wishlists etc.



Personalised (virtual or in-store) interactions with brand experts

Spotlight: Personalised Assistance

Retail leaders go beyond traditional customer support by offering a range of service options, including social media support, call centres, live agents and in-store assistance. They also provide timely updates, facilitate convenient returns, ensure prompt responses, offer 'silent' support options like text messaging and engage in personalised brand interactions. These measures ensure 360-degree transparency and a comprehensive customer service experience available 24/7.

NEW LOOK

The screenshot shows two chat windows for the 'New Look Virtual Assistant'. The left window shows a conversation where the assistant asks 'How can I help you today?' and the user responds 'I am sorry that you haven't received confirmation about your order.' The right window shows the assistant asking 'Did you check out on your account or as a guest?' with buttons for 'On my account' and 'As a guest'.

Chatbots for seamless virtual assistance

Chatbots serve as efficient tools for providing quick and easy virtual assistance and enhancing customer interactions. 74% of online shoppers prefer using chatbots when looking for answers to basic queries. The integration of chatbots represents a contemporary approach to customer service, aligning with the demands of the digital age.

***New Look** provides comprehensive chatbot support for orders, products, returns and exchange-related queries.*

NEXT

Returning from Home

Returning from Home

To use our collection service, place all items into a single parcel and attach one returns label. We will send a courier to collect your items, this service costs **£2.50**. Enter your details below to arrange a courier collection.

Courier returns are no longer included with new/unlimited for new and renewing customers. Please refer to our [returns policy](#) to check your eligibility for free courier returns, based on your subscription start date.

Just a reminder perishable items such as food, plants, drinks and fresh flowers cannot be returned. This does not affect your right to return faulty items.

Choose Preferred Day:

Pick Up Instructions:

[Arrange Home Collection](#)

Ability to schedule return pick-ups

82% of UK shoppers agree that retailers should improve their return processes. Offering hassle-free returns enhances customer satisfaction, instilling confidence and loyalty in the brand. Streamlining return procedures also fosters a positive shopping experience.

***Next** allows shoppers to schedule return pick-ups at a preferred date and time slot.*

Dive Deeper with the 2024 Unified Commerce Benchmark for Specialty Retail in Europe

For a comprehensive analysis of unified commerce across all specialty retail segments, don't miss the "2024 Benchmark: Unified Commerce for Specialty Retail in Europe". Gain valuable insights, best practices and in-depth case studies from industry leaders beyond your immediate peer group.

Elevate your brand's customer experience and stay ahead of the curve with the full benchmark report.

↓ | DOWNLOAD



UK Dashboard

Category	UK Maturity
Overall	Average
Search & Discovery	Below Average
Cart & Checkout	Below Average
Promising & Fulfilment	Below Average
Service & Support	Average

Retailer	Leader In
Marks & Spencer	O SD CC
Next	PF SS
Nike	PF

Standout Capabilities:

- Enhanced transparency: responsible sourcing information and brand's sustainability initiatives (SD)
- Detailed inventory view: product availability status online and at specific store locations (SD)
- Advanced product visibility: callouts for new arrivals, trending products and category-specific/bundled product recommendations (SD)
- View and apply promo codes at checkout (CC)
- Flexible payments: PayPal, Apple Pay, Google Pay, gift card or combine multiple payment options for the same order (CC)
- Advanced ordering: product/order customisation or personalisation (CC)
- Real-time order visibility and status tracking with proactive communications (PF)
- Sustainable product packaging (PF)
- Order transparency: view/select fulfilment method on PDP and at checkout (PF)
- Flexible returns: initiate online, in-store returns or initiate returns via chat/call (SS)
- Support via email, call, live chat or virtual assistant (SS)
- Live agent support on product information, payments, order modifications, returns and exchanges (SS)

Improvement Opportunities:

- Augmented/virtual reality experience (SD)
- Advanced findability: filter products by availability status, sustainability or fulfilment method (SD)
- Endless aisle experience: callouts for low stock/out-of-stock products, product restock notifications (SD)
- Brand communications for products left in cart or inventory availability status at checkout (CC)
- Expanded payment options: the ability to pay via payment link, mobile wallets or direct bank transfer (CC)
- Ability to pre-order out-of-stock or newly launched products (CC)
- Flexible fulfilment options: pick-up from collection points or order in-store for home delivery (PF)
- Ordering flexibility: modification (post-confirmation) (PF)
- Sustainable choices: carbon footprint by delivery methods (PF)
- Advanced return options: drop off products at UPS or post office (SS)
- Personalised in-store experience: associates' ability to view shopper's purchase history, wishlists, etc. (SS)
- Personalised (virtual or in-store) interactions with brand experts (SS)

O = Overall | SD = Search & Discovery | CC = Cart & Checkout | PF = Promising & Fulfilment | SS = Service & Support



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

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

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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



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.

manh.co.uk



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