



Digital Maturity Benchmark

2023 Omnichannel Experience Index

IN PARTNERSHIP WITH





Market Trends

Outlook & Consumer Behavior

Accelerated digital adoption continues.

The accelerated path to digital offers both opportunities and challenges.

Economic Uncertainty

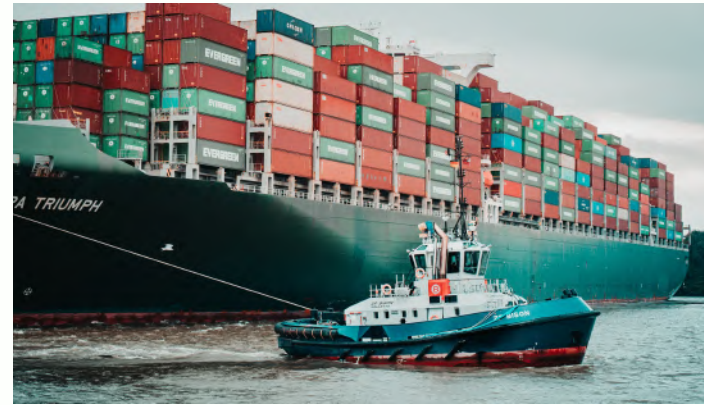


The long-term impact of high inflation and shrinking GDP growth may manifest itself in the coming year in increased shopper value consciousness and margin pressure on enterprises. Although digital commerce offers retailers a growth opportunity, **they must improve operational profitability or risk margin erosion.**

Source: Incisiv Research

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Supply Constraints



Global uncertainty and supply disruptions continue to impact product availability and increase costs. This is an opportunity for both retailers and manufacturers to leverage digital technology, reimagine supply chains and build redundancies. In the short term, **retailers will need greater supply chain agility and the ability to put enterprise inventory to its most productive use.**

A New Age of Consumerism



Digital is the default channel for shopper engagement. From watching TV on the go, to playing a favorite playlist, to ride-hailing — shoppers do not see channels the way retailers do. **Retailers must continue to drive differentiation through continuous digital experience innovation.**

Focus on Sustainability



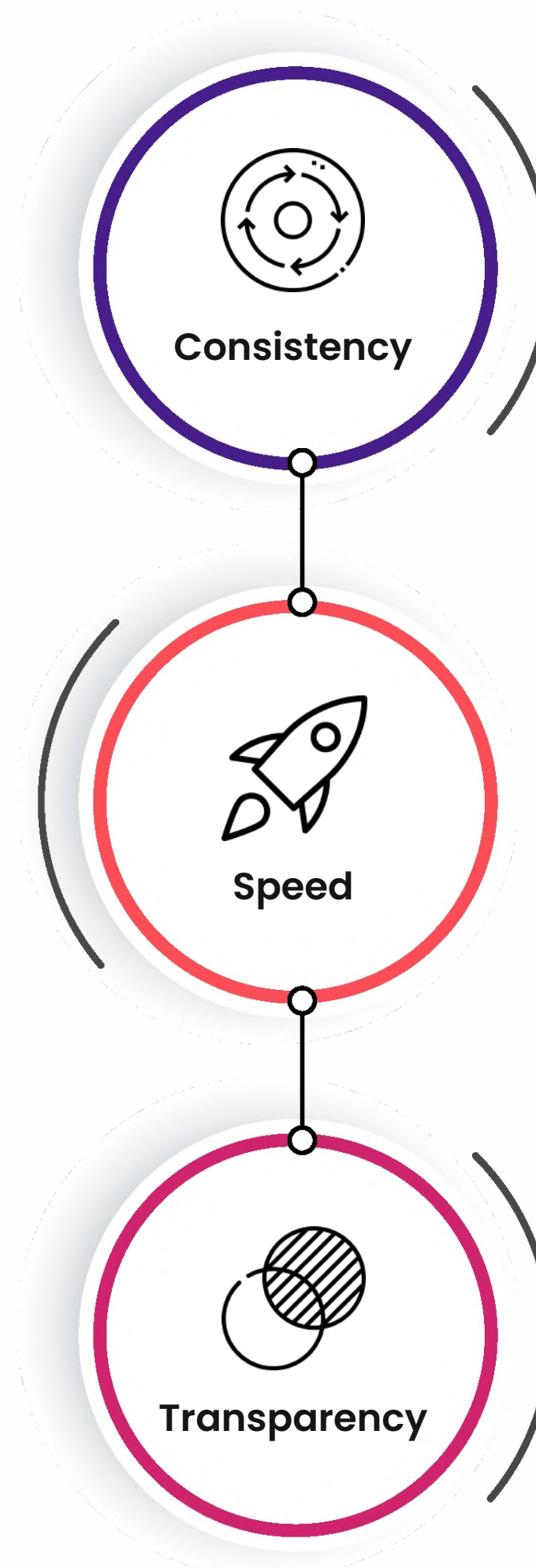
Environmental, social, and governance (ESG) factors impact the purchase decisions of close to 45% of shoppers globally. Shoppers are actively looking for and willing to pay extra for sustainable products. While consumerism may conflict with a sustainable lifestyle, a well-executed omnichannel strategy is a great foundation for retailers to help bridge the gap for consumers.

Shopper preferences and expectations of a retailer's omnichannel experience continue to evolve and increase.

Digital is the entry point to more shopper experiences than ever before. 93% of all shopping journeys now begin online, up from 81% in 2020.

From planning hobby lessons, to home renovations, to ordering groceries, to making restaurant reservations, consumers think digital first.

For omnichannel retailers, these ever-evolving shopper needs have led to new and increasingly complex challenges.



Consistency of interaction across channels and seamless cross-channel movement.

e.g. Let me use a coupon I found on a social channel in-store. Or show me the available assortment based on my chosen fulfillment method, store, and/or preferred delivery or pickup time.

Speed of delivery, whether it involves buying online, picking up in store, or home delivery.

e.g. Give me greater control over when and where I want my order delivered or picked up: delivery by, deliver on, deliver during, and deliver at choices per item in a single cart.

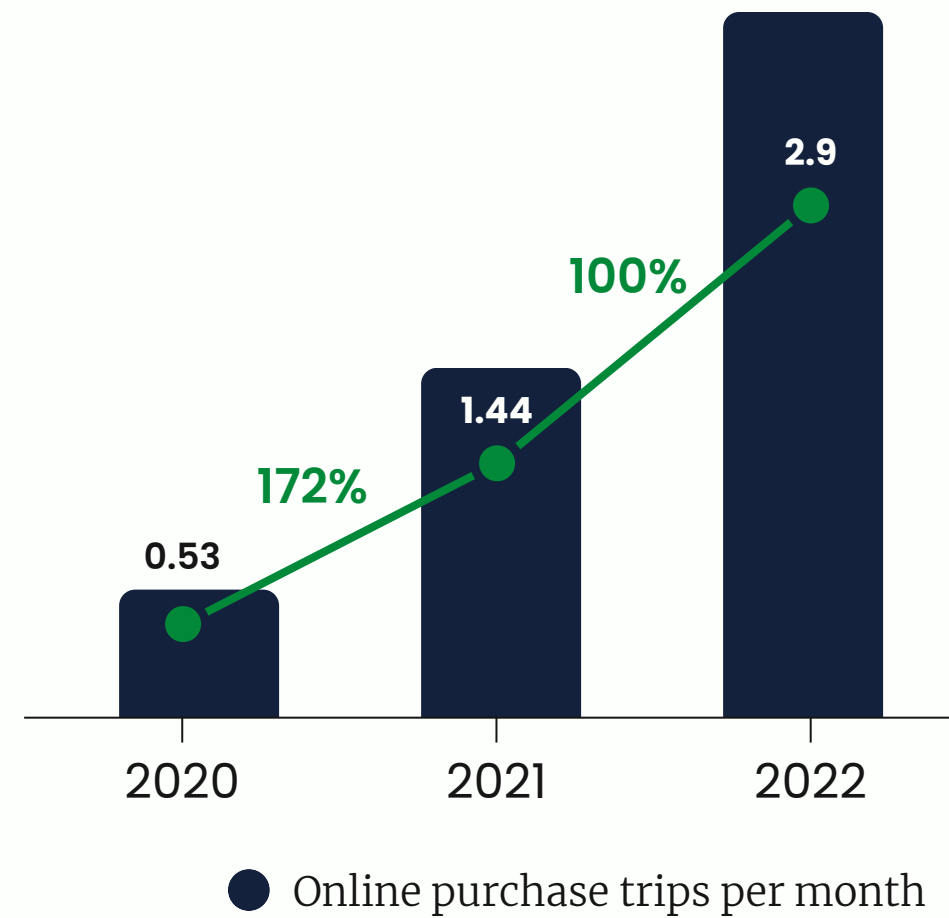
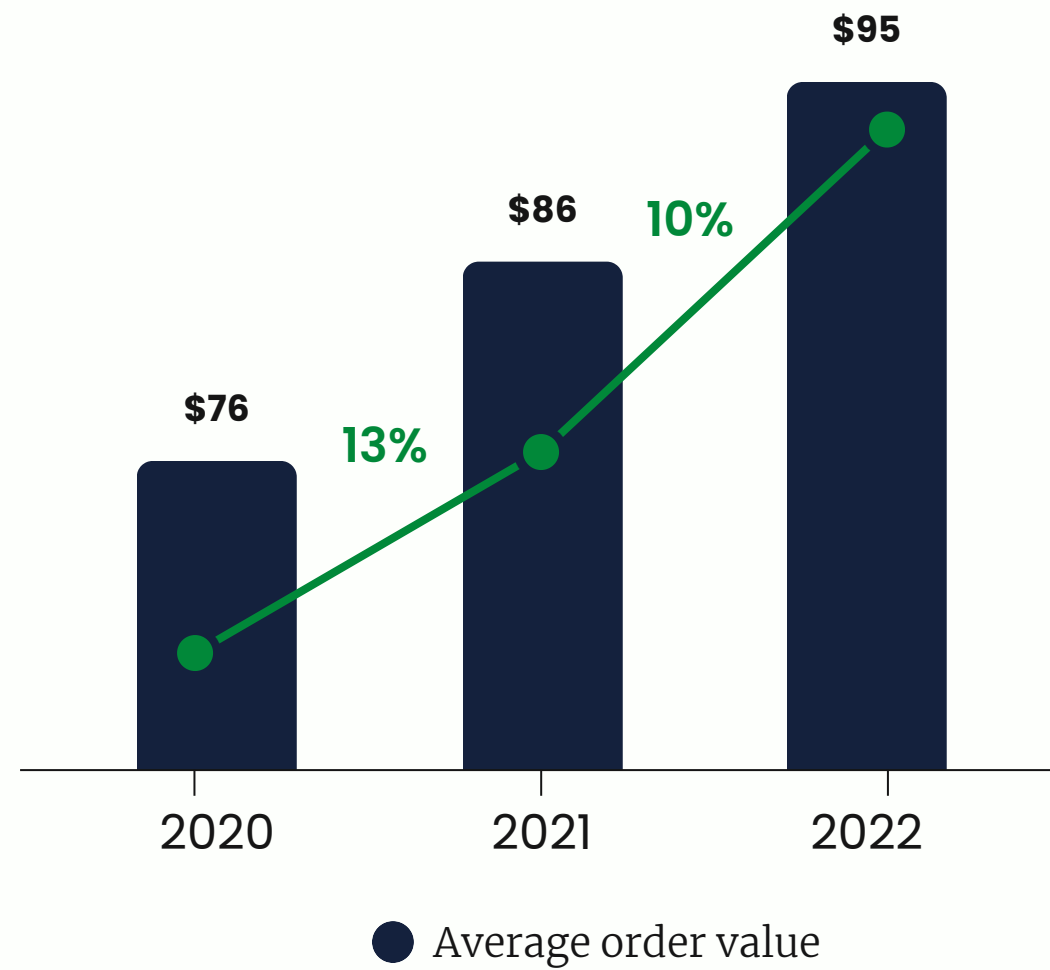
Transparency about products and services of interest, order status, and customer service requests.

e.g. Show me where my order or service request is in detail, including complex scenarios that include third parties (such as appliance installation).

Source: Incisiv Research

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Digital share of revenue continues to increase.



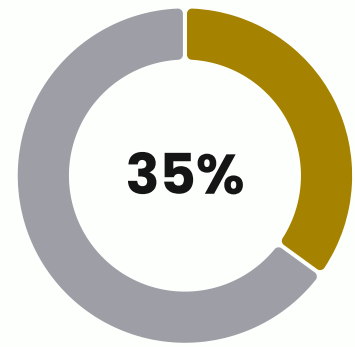
The pandemic-driven digital shift is here to stay. The share of digital revenue continues to increase across segments.

Both the number of purchase trips and the average order value continue to increase.

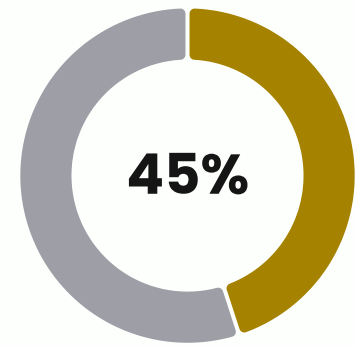
Source: Incisiv Consumer Survey, 10,000 respondents

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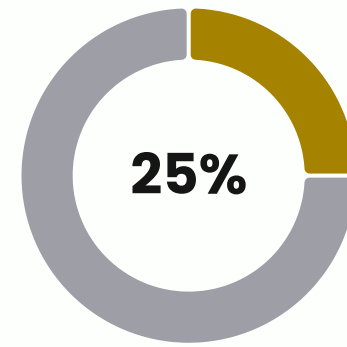
Evolving shopper preferences have profound implications for retailers.



Shoppers prefer home delivery



Shoppers prefer buy online return in store



Shoppers prefer curbside delivery

Operational Impact
Medium

Margin Impact
7-10%

Operational Impact
High

Margin Impact
5-9%

Operational Impact
High

Margin Impact
3-6%

The majority of shoppers have come to expect a seamless omnichannel experience. Product category determines the channel of purchase.

40% of shoppers prefer same-day delivery.

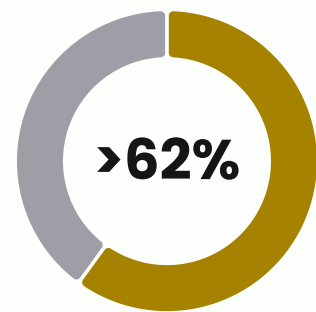
Shoppers are willing to pay an average delivery fee of \$5 for delivery in under 2 hours.

Source: Incisiv Research

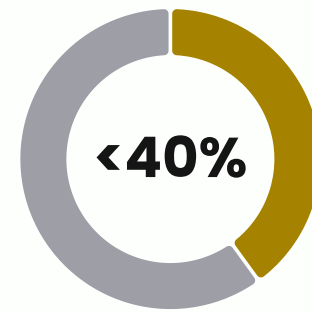
Retailers need to evolve their omnichannel strategies, and operationalize them through the right tools and operating models.

Most retailers were extremely quick to react to pandemic-induced digital acceleration. The rapid cobbling together of systems to get the job done was necessary to reduce business disruption. While fast-paced digital adoption ensured business continuity, it resulted in severe operational challenges (bottlenecks, customer service issues, etc.) and margin erosion. In order to deliver a differentiated digital experience and ensure profitable growth, retailers need an integrated strategy, digitization, and operations plan.

Shoppers who look online for a product before a store visit



Shoppers loyal to their preferred retailers' digital channels



Source: Incisiv Research

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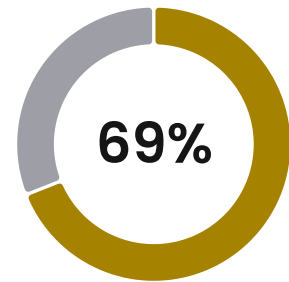
What are the biggest gaps and opportunities for retailers to improve the omnichannel fulfillment experience?

Also, which retailers provide the best omnichannel fulfillment experience to shoppers? Incisiv's 2023 Omnichannel Experience Index explores.

While retailers have adopted many capabilities for a seamless omnichannel experience, they still have a long way to go to fully meet shopper expectations.



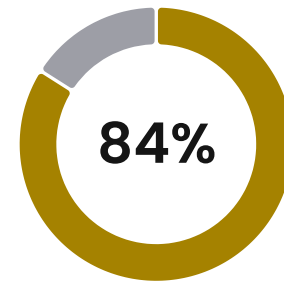
Inventory Visibility



Allow shoppers to check in-store inventory



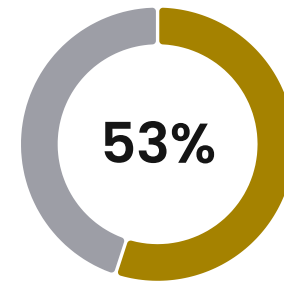
Frictionless Fulfillment



Offer the option of buy online, pickup in store (BOPIS)



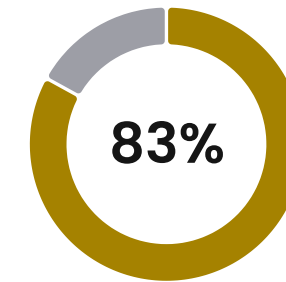
Sustainability



Offer sustainable packaging for products



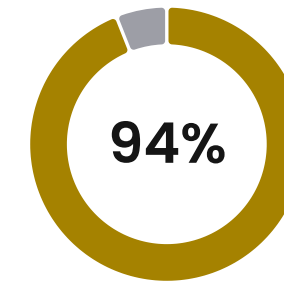
Cost & Payments



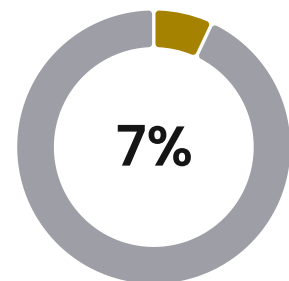
Offer gift card as a mode of payment



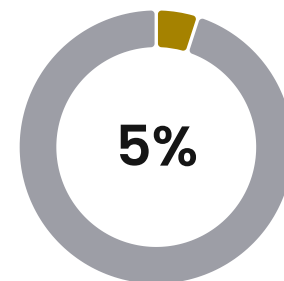
360-Degree Service



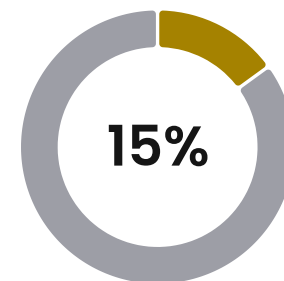
Have a return policy available



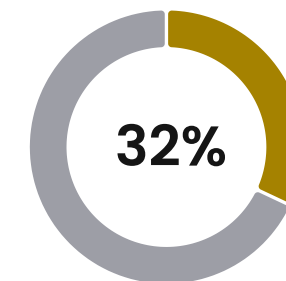
Provide a schedule for new product launches



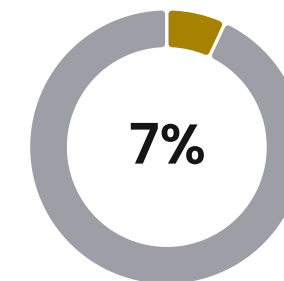
Offer locker collection service



Offer sustainable shipping options



Allow use of multiple payment options for the same order



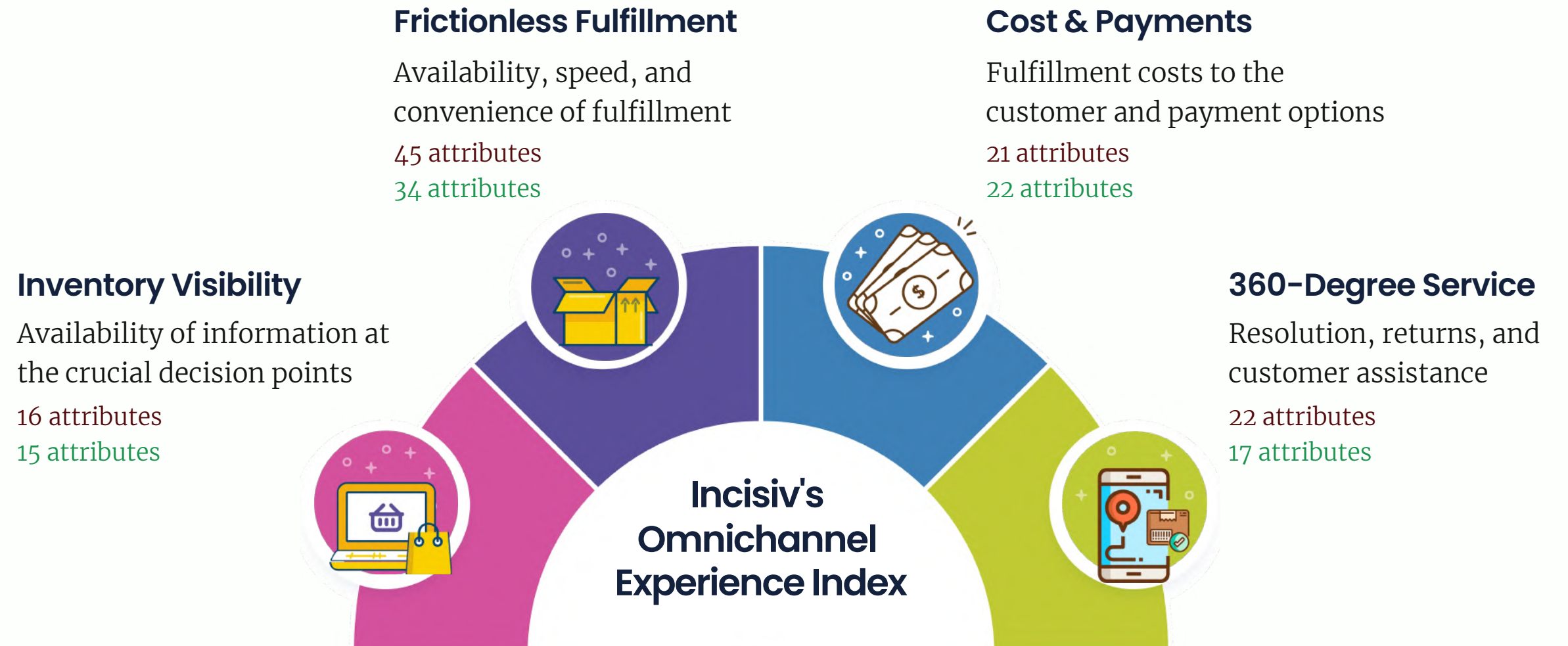
Offer the option to schedule return pickup



Omnichannel Experience Index Methodology & Approach

Incisiv's 2023 Omnichannel Experience Index assesses top omnichannel retailers' digital ordering and fulfillment capabilities across 4 key areas.

The index is comprised of the top omnichannel retailers across 7 different industry segments. Each retailer's omnichannel capabilities and experience were assessed using an observational methodology.



115

retailers benchmarked
104 retailers benchmarked in 2021

104

digital capabilities assessed
88 capabilities assessed in 2021

7

segments covered: apparel, consumer electronics, department stores, general merchandise, grocery, health and beauty, and specialty

Unless stated otherwise, all data in this report is from Incisiv's 2023 Digital Maturity Benchmark.

Text in green indicates 2021 data

Each assessment area includes table stakes and differentiating experiences designations. These are defined based on their overall level of adoption, perceived value by shoppers, and impact on key performance indicators (KPIs), such as average order value (AOV), conversion traffic, and customer satisfaction.

Table Stakes

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

Differentiating Experiences

Advanced capabilities that address important emerging shopper expectations. The presence of these capabilities has a positive impact on digital performance KPIs.

Illustrative examples of **table stakes** and **differentiating experiences**



Inventory Visibility

- Inventory visibility in cart view
- Callouts for new arrivals, bestsellers
- Availability of fulfillment options on the product page
- Advanced product filters: in-stock, mode of fulfillment, delivery time, stock quantity
- Pre-order and back-order of out-of-stock products
- Suggested stores for out-of-stock products



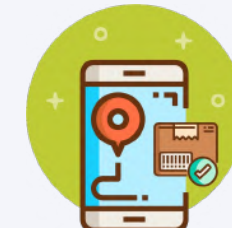
Cost & Payments

- Visibility of delivery cost by fulfillment method
- Payment options: credit/debit card, gift card, PayPal
- Membership programs that include delivery benefits, loyalty program with delivery benefits
- Payment options: wallets, Buy Now, Pay Later
- "Subscribe-and-save" product subscriptions



Frictionless Fulfillment

- Variety of fulfillment options: BOPIS, ROPIS, curbside etc.
- Availability of order tracking information
- Order pickup alerts
- Expedited fulfillment (2-hour, 30 minutes, same-day)
- Delivery timelines basis destination code
- Product customization



360-Degree Service

- Self help tools: FAQs, policies
- Return online purchases to store
- Cancel order before shipping
- Flexible return options: schedule return pickup, return while picking up curbside, drop at third party location (UPS/FEDEX etc.)
- Digital customer engagement with shopping assistants, 1-to-1 appointments, etc.

Omnichannel Experience Index: Rating Categories.



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

Adoption of table-stakes capabilities: Medium
Adoption of differentiators: Low



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

Adoption of table-stakes capabilities: Medium-High
Adoption of differentiators: Low



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

Adoption of table-stakes capabilities: High
Adoption of differentiators: Medium



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

Adoption of table-stakes capabilities: High
Adoption of differentiators: High



Overall Leaders.

Incisiv recognizes these 20 retailers and brands as **Overall Omnichannel Experience Leaders** within and across retail segments.

They are the benchmark for omnichannel experience in 2023, offering differentiated experiences across the shopping journey.

The full leaderboard is available at the end of this report.

Retailers rated as Omnichannel Experience Leaders, in alphabetical order.

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01 | Inventory Visibility

Accurate Inventory Insight at Purchase Decision Points

INVENTORY VISIBILITY: OVERVIEW

Inventory visibility is a must for customer retention.

It is no longer good enough for retailers to offer shoppers an expanded online assortment through one inventory view and endless aisle strategies.

Shoppers want to know exactly what products and services are available to them in the context of their needs.

Can I get it delivered tomorrow? Is it available at my local store for pickup? Can I quickly view nearby stores where it is available? Can I back-order it if it is out-of-stock?

Source: Incisiv Research

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WHY IT MATTERS

With digital becoming the first point of customer interaction in more than 90% of purchases, inventory visibility and accuracy are the top experience priorities for retailers.

46% of shoppers

check stock availability online before visiting a store to make the purchase.

34% of shoppers

would switch brands if their preferred product was out-of-stock.

Only 13% of shoppers

wait for their product to come back in stock at their preferred retailer.

WHAT WE ASSESS

This section evaluates the availability, completeness, and accuracy of information at important customer decision points in the shopping journey. The attributes assessed, if present, would greatly improve customer trust and lower cart abandonment.

16 total attributes assessed, including:

- Availability of product callouts like new arrivals and bestsellers.
- Tagging/flagging items that have low inventory or are out-of-stock.
- Presence of back-in-stock dates or notification options for them.
- Availability of fulfillment options on every page of the purchase journey (listing, product display, cart).
- Filters for various fulfillment options, stock-outs, and delivery speed (<2 hours, same-day).




















Leaders in Inventory Visibility.

Incisiv recognizes these 17 retailers and brands as leaders in **Inventory Visibility** within and across retail segments.

Building upon a solid foundation of table-stake capabilities, they lead in the adoption of differentiated inventory visibility capabilities.

The full leaderboard is available at the end of this report.

Retailers rated as Omnichannel Fulfillment Experience Leaders in Inventory Visibility, in alphabetical order.

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Department stores lead in the adoption of advanced filters and callouts on the listing page.

The adoption of functional capabilities varies significantly by retail format.

Department stores have comprehensive advanced options to filter by fulfillment options, as well as inventory callouts.

General merchandise retailers offer full in-store inventory visibility.

Lowest Adoption



Highest Adoption

Consumer electronics
60%

Store inventory visibility
Industry average adoption: 70%

General merchandise
82%

Grocery
27%

Nuanced filters by fulfillment option
Industry average adoption: 50%

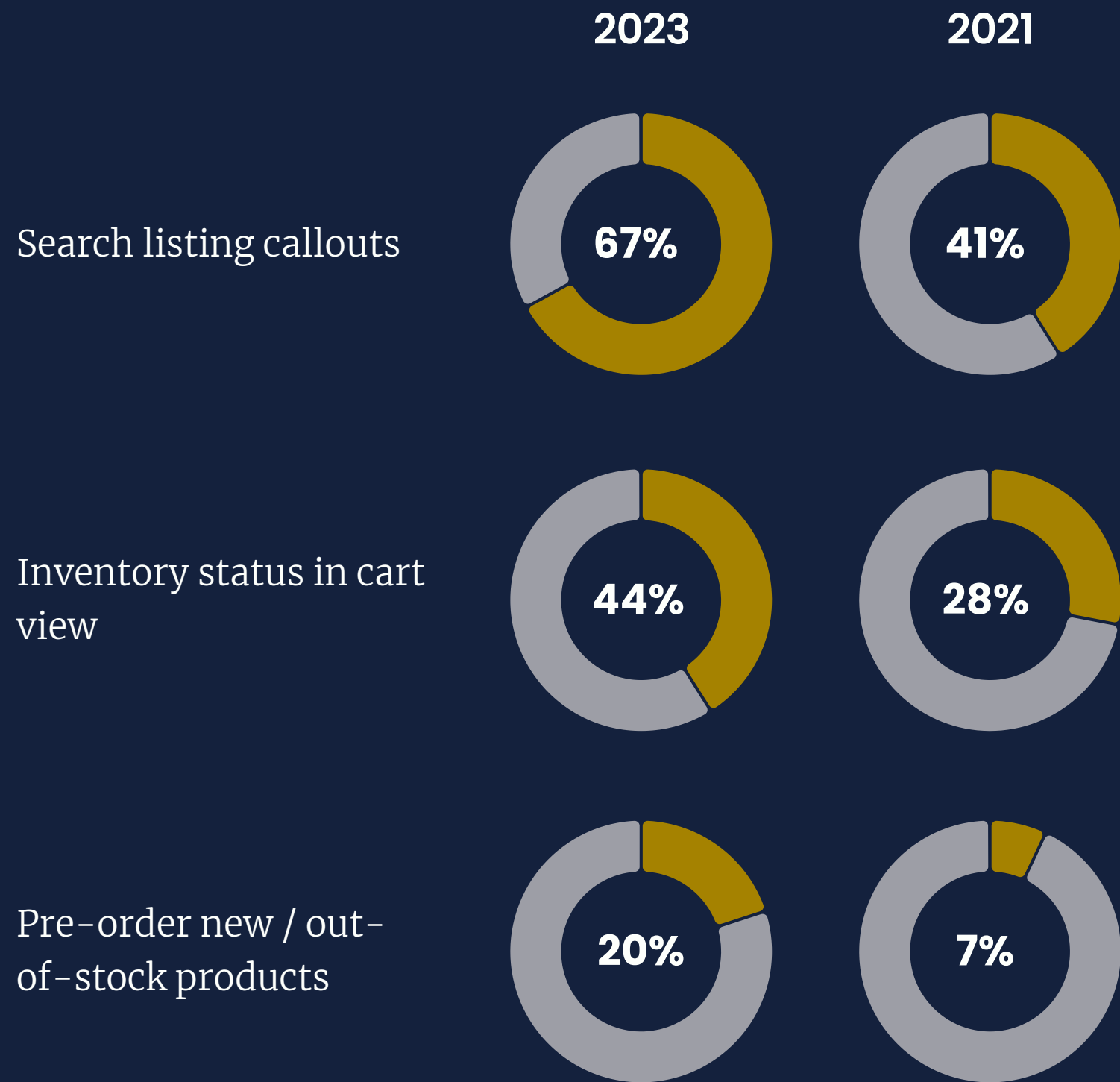
Department stores
70%

Consumer electronics
7%

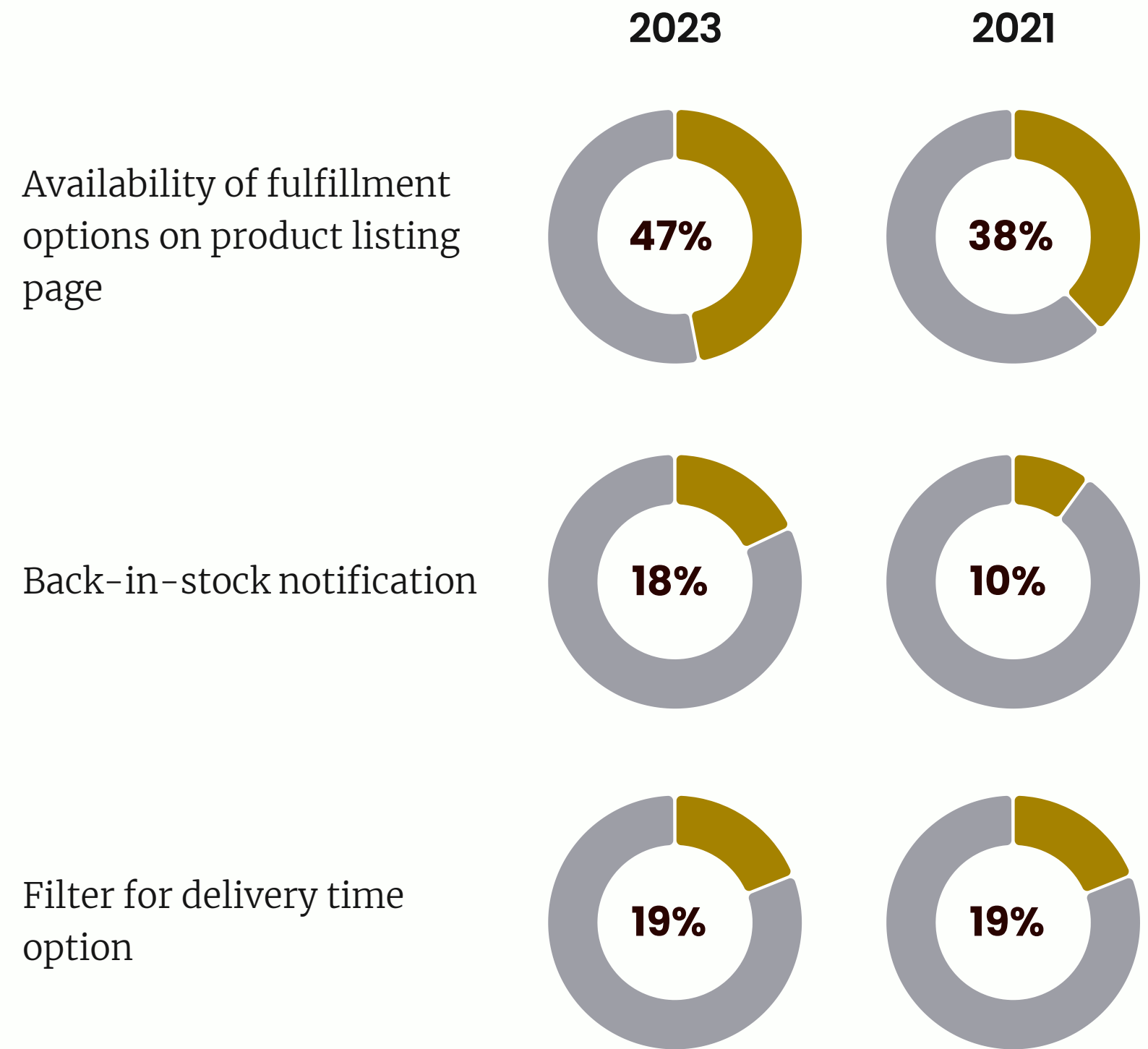
Inventory callouts: new, limited inventory
Industry average adoption: 68%

Department stores
90%

Areas of high growth: inventory and new product information.



Areas of low growth: filters and stock notification.



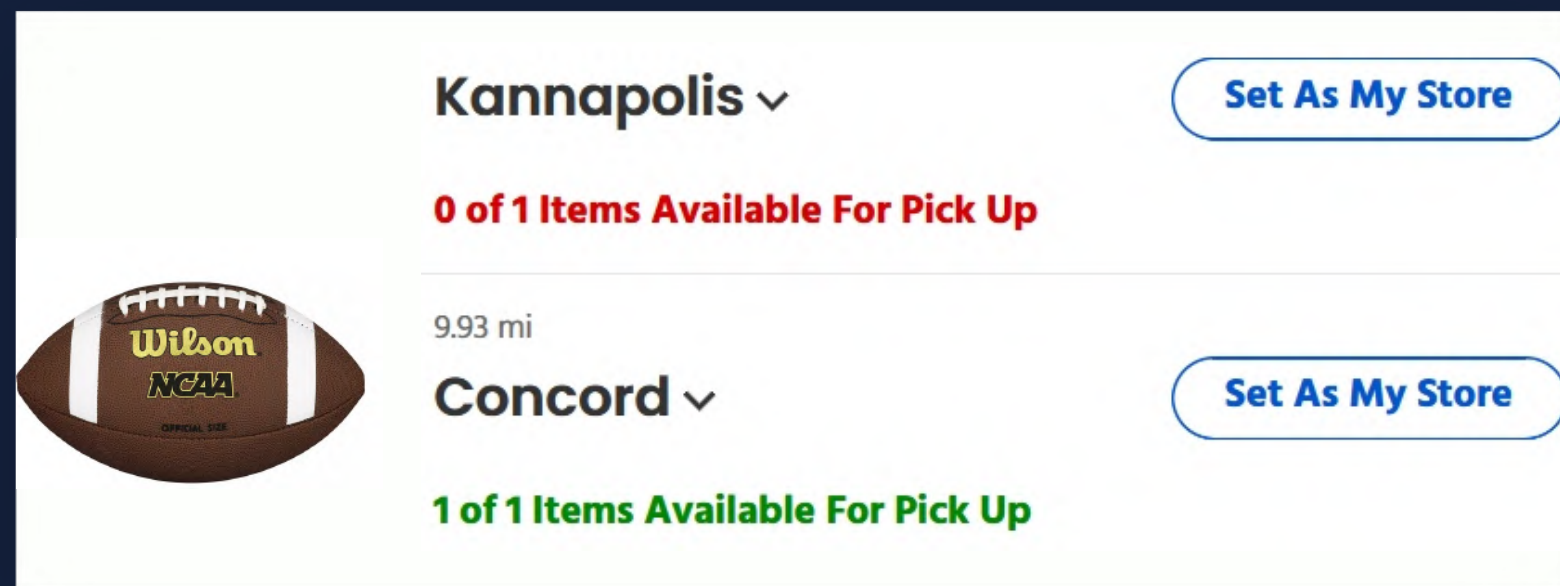
Source: Incisiv Research

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INVENTORY VISIBILITY: SPOTLIGHT

Product availability at nearby store locations.

40% of shoppers value a retailer sharing information on inventory levels, yet only 22% of retailers provide transparency of stock availability across stores.



Kannapolis ▾ [Set As My Store](#)

0 of 1 Items Available For Pick Up

9.93 mi

Concord ▾ [Set As My Store](#)

1 of 1 Items Available For Pick Up

Academy Sports + Outdoors recommends alternate locations where stock is available and fulfillment options for out-of-stock products.

Filter based on different delivery options.

67% of shoppers want their purchase to be delivered within the next business day. Currently, only 18% of retailers offer a filter for expedited delivery.

Curbside Pickup at Atlanta:

Today (order by 12pm)

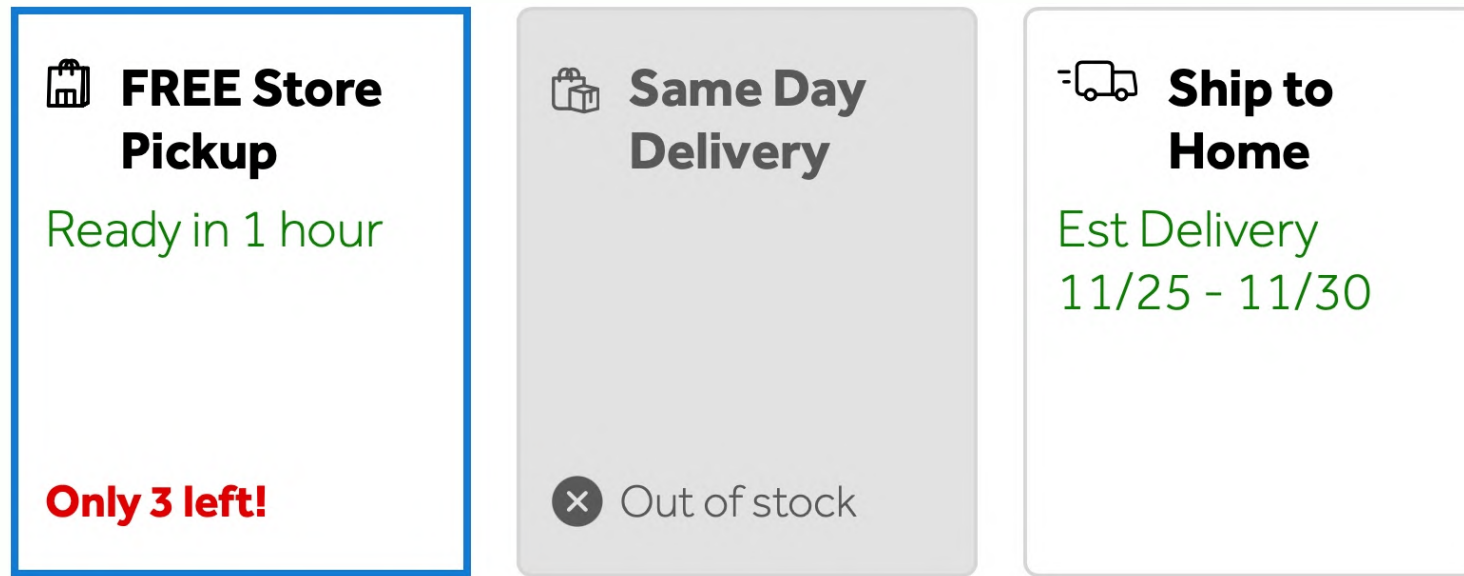
Delivery to 99801:

Today (order by 12pm)

Neiman Marcus provides shoppers with delivery timeline filters to enable them to choose the most appropriate product.

Spotlight: Bed Bath & Beyond

Bed Bath & Beyond provides real-time information on the number of units left, in-store availability, and estimated delivery dates on the product detail page.



Pickup Nearby at Staten Island

[Check Other Stores](#)

Stock availability and status.

Shoppers' expectations are constantly changing and their expectations for a seamless shopping experience is higher than ever. They want timely and real-time information on stock availability in-store and online.

55% of shoppers want to browse products online and check what's available in nearby stores.

36% of retailers in the leader category provide real-time inventory status, while 67% of retailers assessed have inventory status callouts (selling fast, in-stock, out of stock etc.)

In the past year, 48% of shoppers have tried a new brand because their preferred one did not have stock. With supply disruptions set to continue, retailers must extend their definition of inventory availability to inventory that is not currently on hand.

30% of shoppers

switch stores if their preferred product is not available and 70% will switch brands.

Only 17% of retailers

flag out-of-stock items on their product listing page.

Only 18% of retailers

provide back-in-stock notifications.



02 | Frictionless Fulfillment

Ease and Convenience of Placing and Receiving Orders

FRICITIONLESS FULFILLMENT: OVERVIEW

Omnichannel fulfillment from digital revolution to operational evolution.

Retailers with mature fulfillment capabilities pre-pandemic saw >150% growth in digital sales. Retailers that lagged were forced into action and introduced new experiences, such as BOPIS and curbside pickup, in record time.

Offering a complete flywheel of online and store-based fulfillment is now table stakes. Retailers need to focus on operational execution. Delivery speed, the ability to customize, and order visibility will drive differentiation and provide a competitive edge.

Source: Incisiv Research

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WHY IT MATTERS

Availability of omnichannel fulfillment options like BOPIS and curbside has become widespread but it is seamless execution and customer satisfaction that will deliver returns for the retailer.

65% of shoppers expect the promised delivery/pickup time to be met.

50% of shoppers are dissatisfied with the availability of products for pickup (vs. 74% in 2021).

1 in 5 shoppers use the locker pickup service when available.

WHAT WE ASSESS

This section assesses the experience of placing and receiving an order through the different fulfillment methods offered. The ease of ordering is directly correlated to conversion and retention.

45 total attributes assessed, including:

- Availability of multiple delivery/pickup timelines and scheduling options.
- Ability to place orders using third-party platforms and brand apps.
- Availability of options to schedule delivery and pickup.
- Post purchase delivery assistance (order tracking, real-time order status, order update/delay notifications).
- Information on estimated delivery dates and best/sustainable delivery options based on shopper location.



Leaders in Frictionless Fulfillment.

Incisiv recognizes these 23 retailers and brands as leaders in **Frictionless Fulfillment** within and across retail segments.

Building upon a solid foundation of table-stake capabilities, they lead in the adoption of differentiated frictionless fulfillment capabilities.

The full leaderboard is available at the end of this report.

Retailers rated as Omnichannel Experience Leaders in Frictionless Fulfillment, in alphabetical order.

| | | | | |
|---------|--|--------------------|-------------------|--|
| | | Bath & Body Works® | BED BATH & BEYOND | |
| | | | | |
| | | NORDSTROM | | |
| SEPHORA | | | | |
| | | | | |

Grocery retailers lead the industry in newer and faster fulfillment options.

Grocery retailers provide a comprehensive set of fulfillment options and capabilities: third-party delivery, 2-hour pickup, curbside, lockers, etc. In addition, they lead the industry in the adoption of store communication for delivery coordination and other customization requests.

Consumer electronics, department stores, and apparel retailers continue to lag the industry in adoption of same-day pickup and scheduling capabilities.

Lowest Adoption



Highest Adoption

Consumer electronics
40%

Curbside pickup
Industry average adoption: 67%

Grocery
80%

Apparel
52%

Same-day pickup
Industry average adoption: 70%

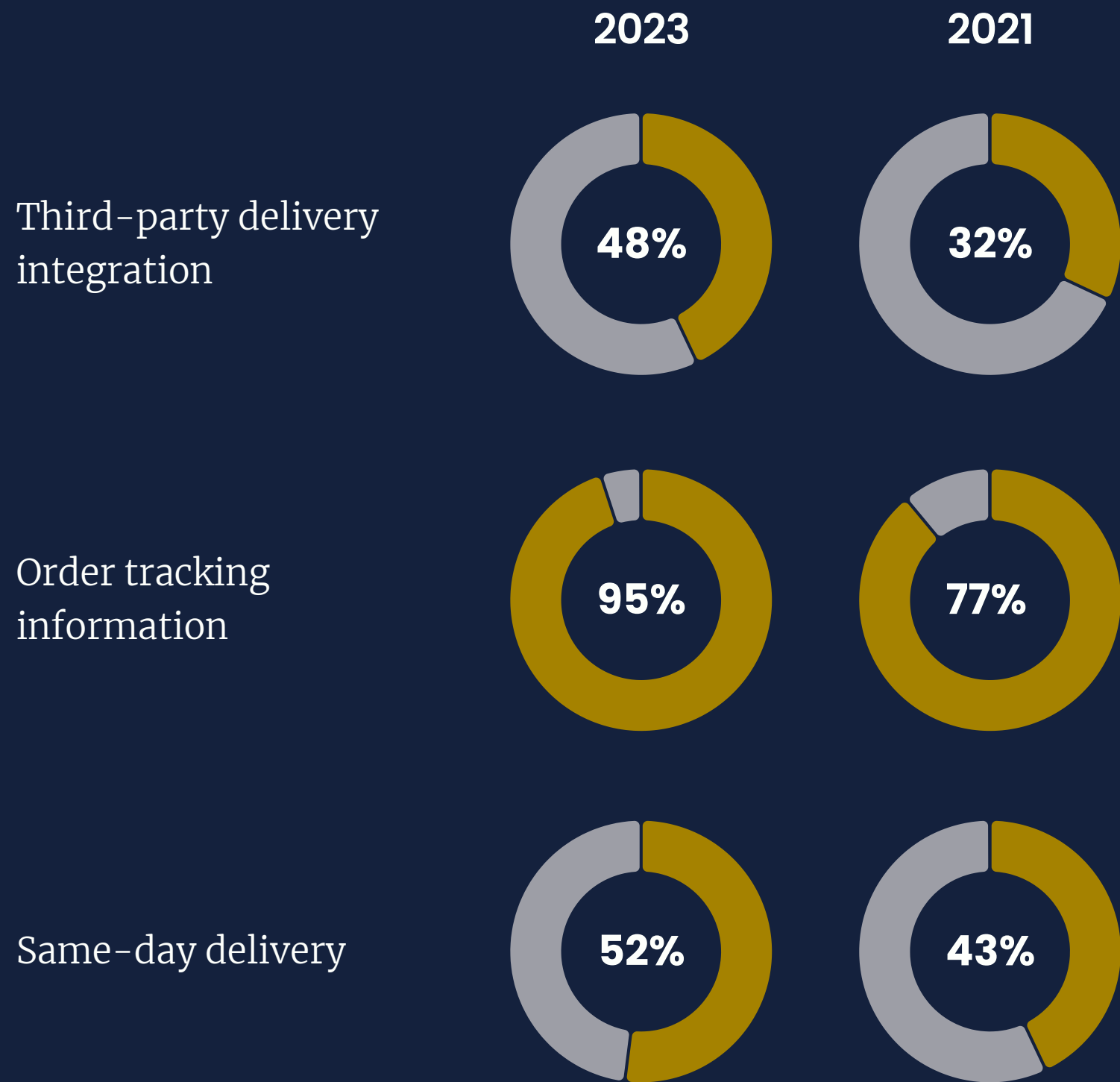
Grocery
87%

Department stores
10%

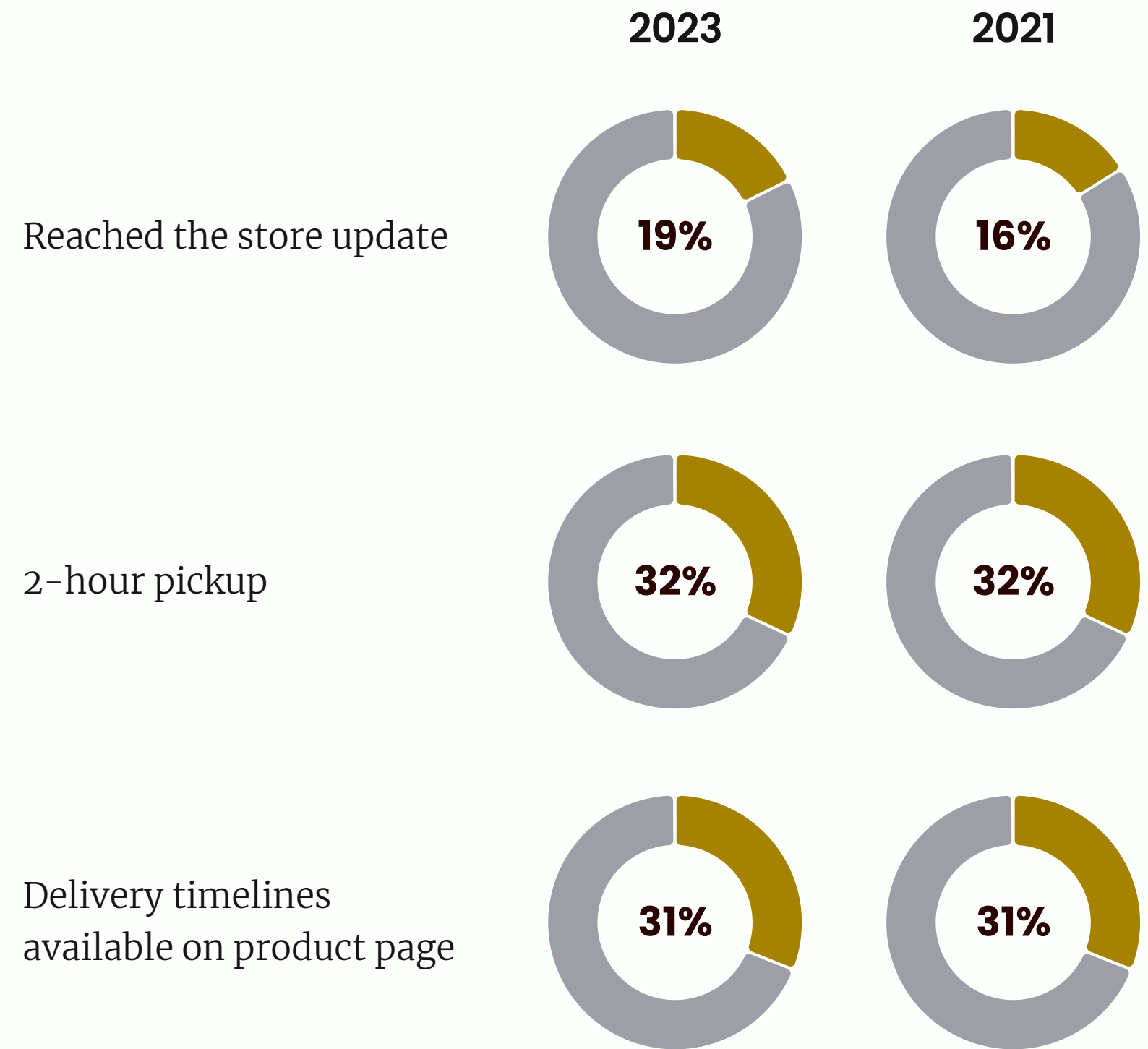
Schedule delivery
Industry average adoption: 32%

Grocery
87%

Areas of high growth: order delivery and tracking.



Areas of low growth: order pickup and promising.



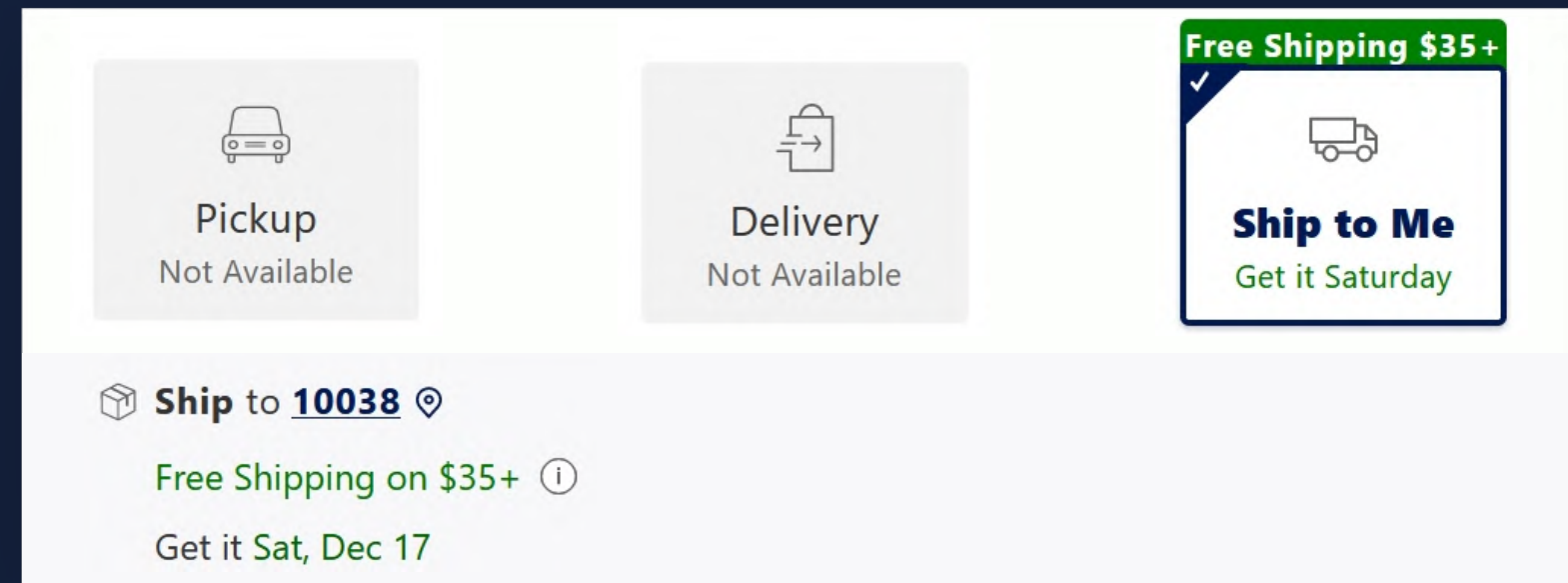
Source: Incisiv Research

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FRICITIONLESS FULFILLMENT: SPOTLIGHT

Visibility to exact product delivery date.

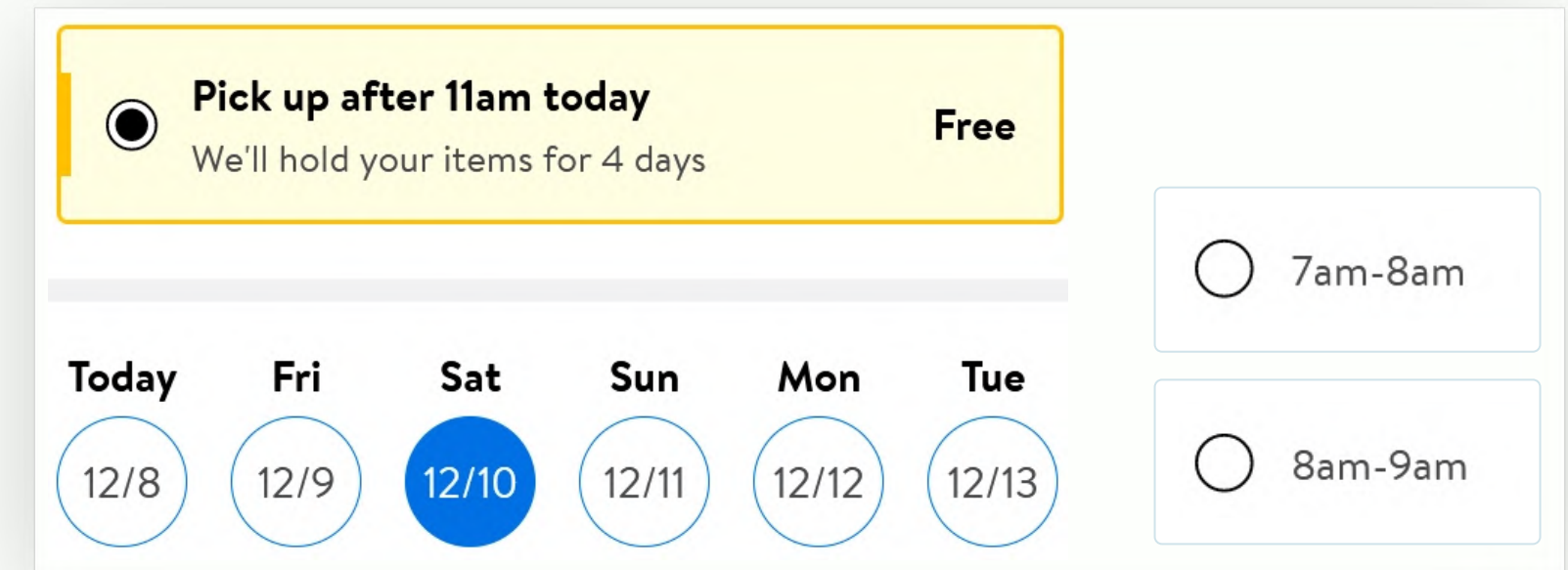
75% of shoppers expect their purchases to be delivered within two days or less, thus transparency about the delivery timeline is vital. Displaying the delivery timeframe provides much-needed clarity to the shopper. However, only 9% of retailers show order dates per destination code on the product listings pages.



Petco provides *exact* delivery date for the selected zipcode/address on the product listing page.

Capability to schedule pickup.

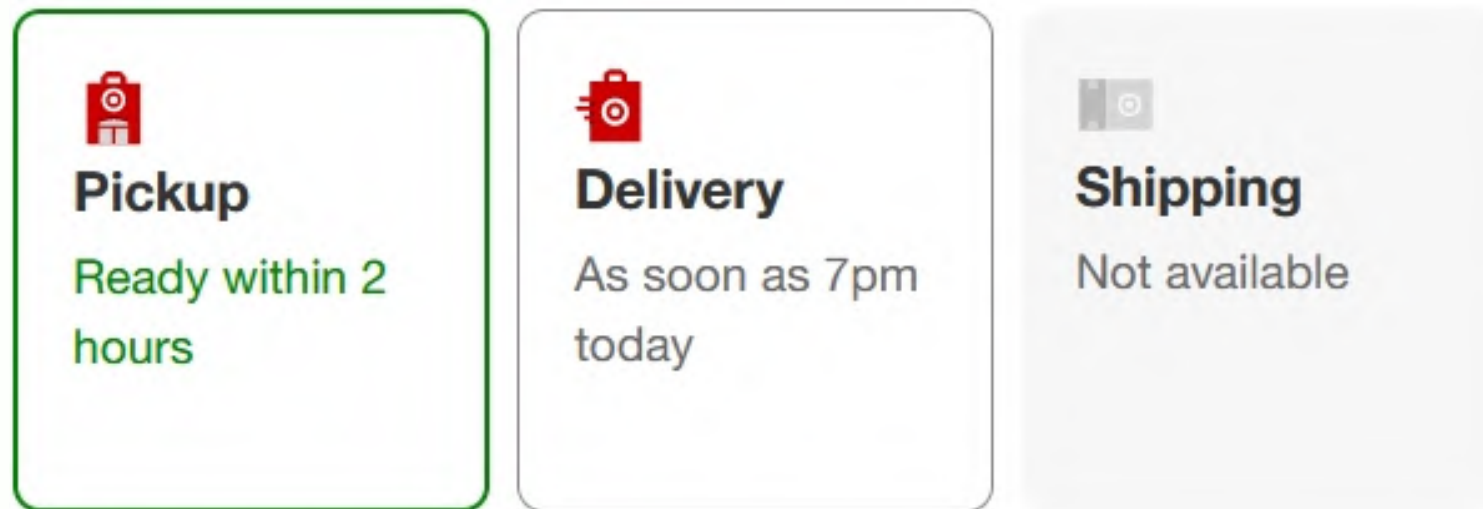
More than 70% of shoppers cite convenience and order visibility as the #1 factor for shopping online. Shoppers prefer retailers who offer the capability to schedule their delivery or pickup. Currently, only 31% of retailers offer the option of scheduling a delivery and pickup.



Walmart gives shoppers the flexibility to schedule order pickup at their convenience.

Spotlight: Target

Target via its Shipt service offers shoppers multiple options for expedited delivery: same-day delivery, guaranteed delivery within an hour, pickup within 2 hours, etc.



Pick up at Bend [Check other stores](#)

Ready within 2 hours for pickup inside the store

Expedited fulfillment.

Retailers are faced with the challenge of not only providing expedited delivery and multiple delivery options, but they also need to ensure seamless execution while managing costs.

Shoppers are looking for expedited fulfillment options and are willing to pay a small premium for it.

73% of shoppers consider expedited order delivery to be a key component of omnichannel experience.

Speed of delivery has gradually become one of the top three purchase decision influencers, along with price and return policy.

56% of shoppers have abandoned their carts due to concerns about delivery time.

Only 21% of retailers provide delivery within 2 hours.

Only 32% of retailers allow shoppers to schedule a delivery at their desired time.

A person wearing a grey sweater and dark overalls is holding a gift bag filled with wrapped gifts. The background is a solid dark red color.

03 | Cost & Payments
**Delivering Outsized
Value for Money**

COST & PAYMENTS: OVERVIEW

Transactional approach to trust and loyalty.

Retailers' free shipping option is a half-truth our consumerist society believes. With the amount of value some big box and online retailers offer, shoppers forget they pay for shipping through their membership.

Most retailers benchmark themselves against Amazon's shipping speed and Target's store fulfillment. Few do so against the outsized value their membership programs deliver to members, creating a lock-in effect that drives high retention, repeat orders, and customer lifetime value.

Source: Incisiv Research

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WHY IT MATTERS

Loyalty in online shopping is low; 45% of online shoppers defect for better deals. Retailers have to make the value tangible for the shopper beyond the product and make the experience frictionless.

79% of shoppers value unlimited free delivery programs and offerings from retailers.

50% of shoppers are more likely to abandon a purchase if their preferred mode of payment isn't available.

65% of retailers offer free shipping for a certain period to draw in shoppers.

WHAT WE ASSESS

This section evaluates the fulfillment options available, costs associated with each method, the different membership programs offered by retailers.

21 total attributes assessed, including:

- Availability of costs associated with different fulfillment options.
- Presence of multiple payment options like gift cards, mobile wallets, loyalty points, and buy now, pay later options.
- Availability of membership programs that provide delivery benefits (free shipping, faster delivery options).
- Ability to choose from a variety of delivery options (BOPIS, home delivery, locker).



Leaders in Cost & Payments.

Incisiv recognizes these 15 retailers and brands as leaders in **Cost & Payments** within and across retail segments.

Building upon a solid foundation of table-stake capabilities, they lead in the adoption of differentiated cost & payments capabilities.

The full leaderboard is available at the end of this report.

Retailers rated as Omnichannel Experience Leaders in Cost & Payments, in alphabetical order.

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Department stores lead the industry in the adoption of payment options.

Department stores and apparel retailers have the most mature digital payment capabilities: PayPal, gift cards, and the option to redeem loyalty points as payment.

Grocery retailers have added unique payment options like Supplemental Nutrition Assistance Program (SNAP), Electronic Benefits Transfer (EBT), and others but still lag other segments in offering a choice of payment options.

Lowest Adoption



Highest Adoption

Grocery
27%

Option to pay via PayPal, gift card, Apple Pay
Industry average adoption: 74%

Department stores/apparel
100%

General merchandise
0%

Free shipping for all orders
Industry average adoption: 11%

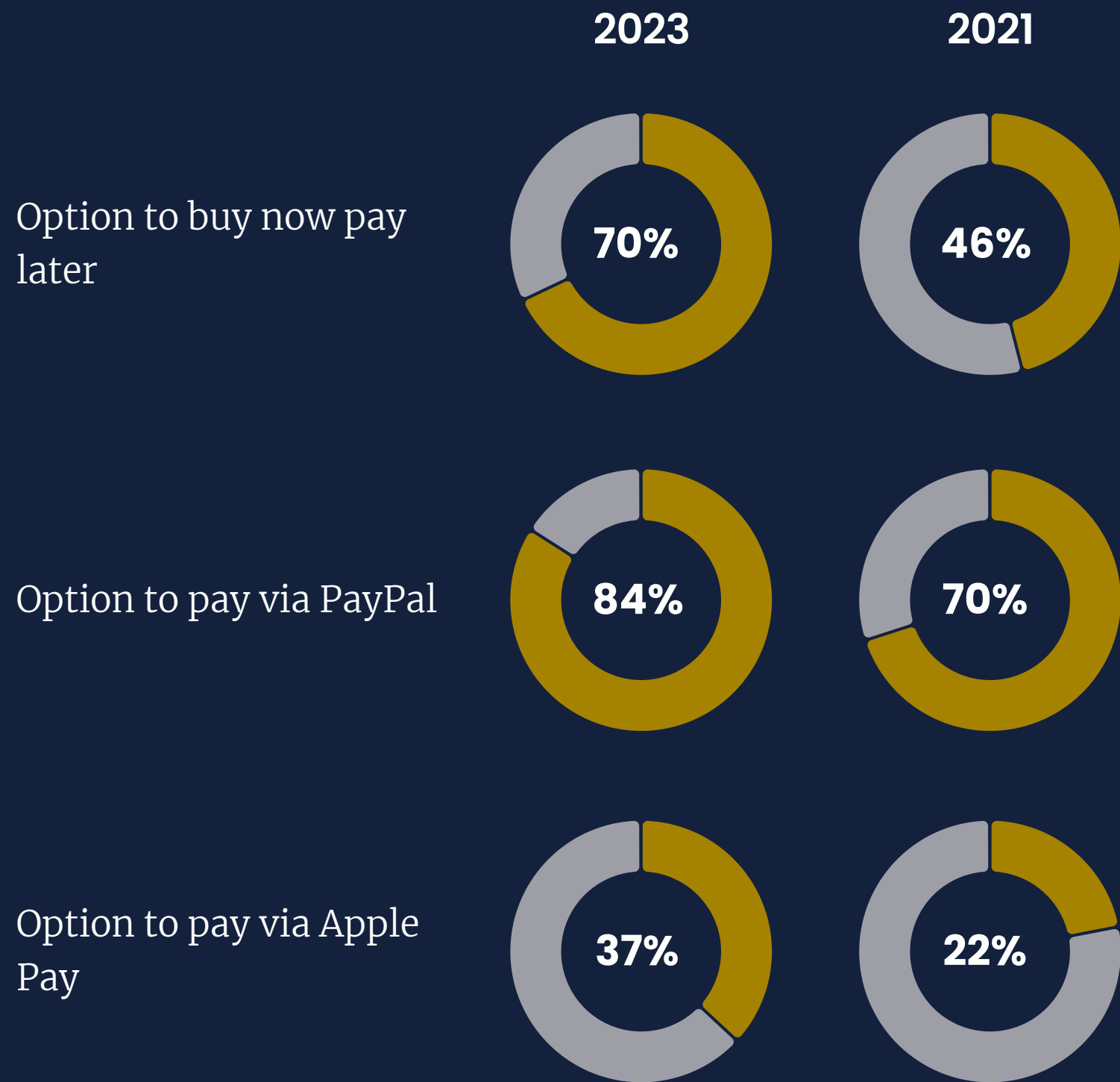
Consumer electronics
40%

Grocery
7%

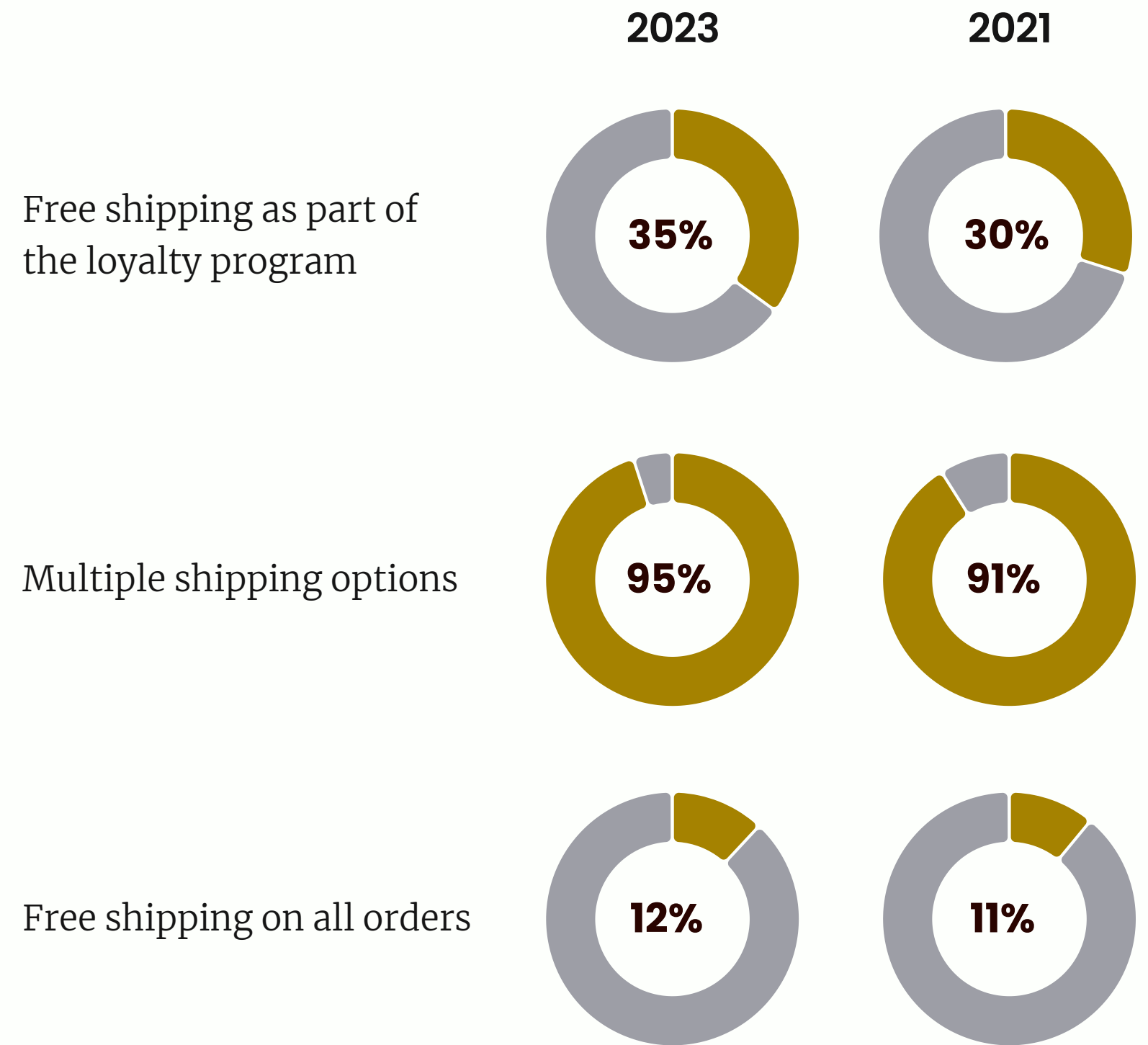
Redeem loyalty points as payment
Industry average adoption: 56%

Department stores
100%

Areas of high growth: payment options.



Areas of low growth: shipping cost.



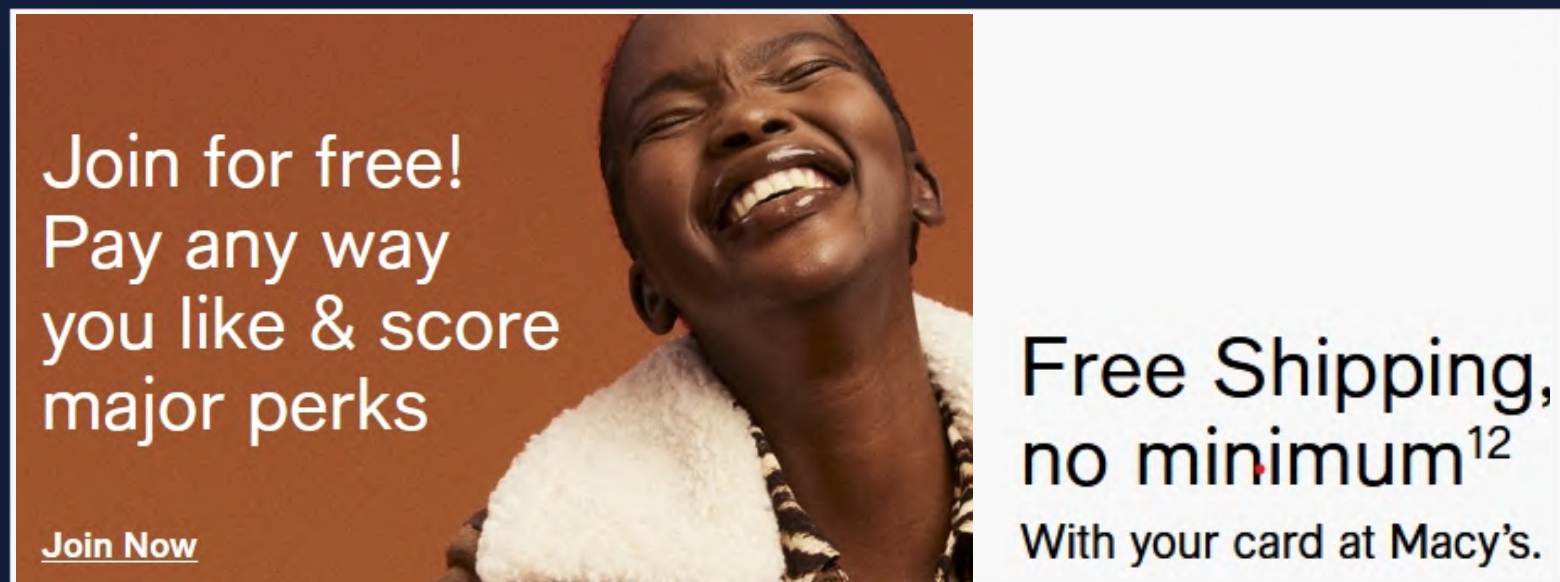
Source: Incisiv Research

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COST & PAYMENTS: SPOTLIGHT

Free delivery on orders for loyalty members.

Free shipping significantly influences the purchase decisions of at least 75% of shoppers. Shoppers are drawn to retailers' loyalty programs to access value-added benefits, such as discounts and free delivery. Currently, 35% of retailers offer free delivery as part of their loyalty programs.



Join for free!
Pay any way
you like & score
major perks

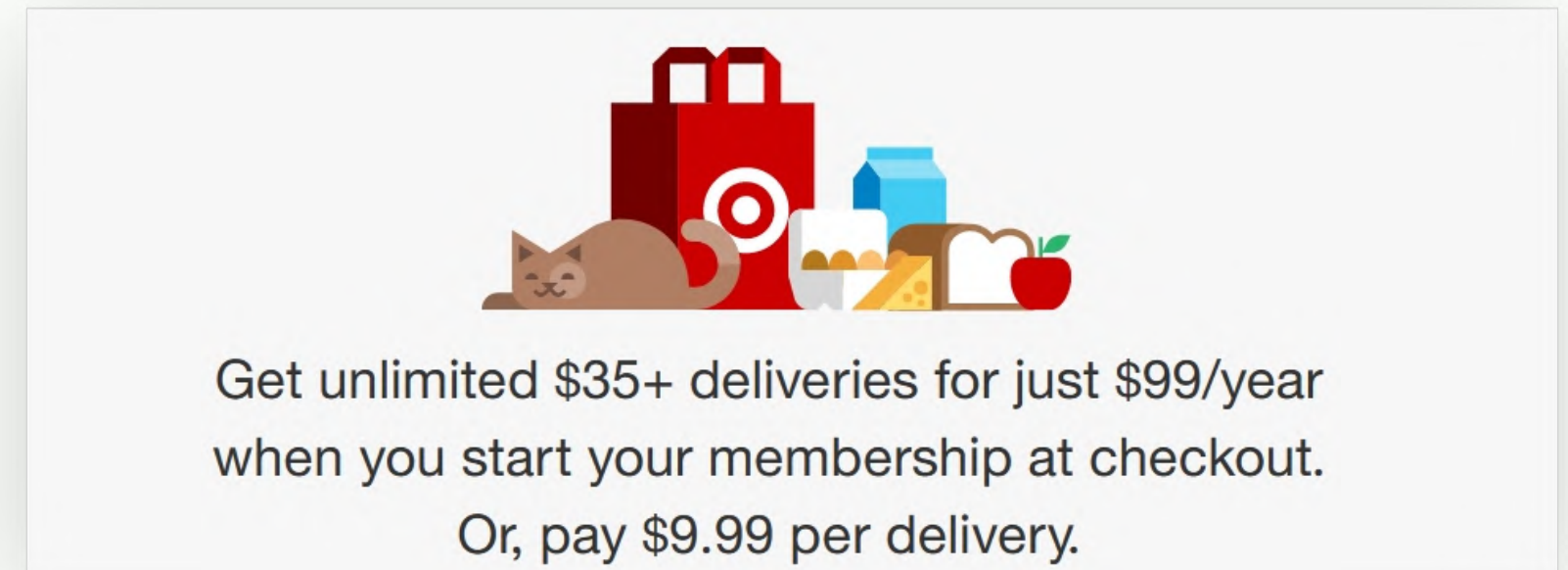
[Join Now](#)

Free Shipping,
no minimum¹²
With your card at Macy's.

Macy's offers free shipping for its Star Rewards members.

Membership program for delivery.

82% of shoppers are willing to reach the minimum order amount to earn free delivery. Paid membership programs that offer free delivery have become a motivating factor for shopper engagement and an opportunity to offset delivery costs. Presently, only 23% of retailers offer delivery membership programs.



Get unlimited \$35+ deliveries for just \$99/year
when you start your membership at checkout.
Or, pay \$9.99 per delivery.

Target offers shoppers memberships that reduce delivery costs to zero, making purchases more cost effective.

Spotlight: Williams Sonoma

Williams Sonoma offers shoppers free standard shipping on all purchases for an annual fee of \$99 for its Reserve membership program.

Get Free Shipping with Williams Sonoma Reserve

- Free standard shipping*

Delivery membership program.

More retailers now offer free shipping as part of their loyalty program or on purchases of select merchandise, as shoppers desire low-cost methods of fulfillment. Free shipping has become one of the most compelling reasons to make a purchase.

62% of shoppers consider free delivery as an important consideration for purchase decisions.

65% of shoppers would be interested in joining a loyalty program if it offers premium delivery service.

Delivery costs have become an important factor in determining purchase decisions. Shoppers now expect free shipping for their purchases and consider extended delivery timelines to be a drawback.

Another essential factor in purchase decisions is the flexibility to pay by their preferred method.

Only 11% of retailers offer free shipping on all orders.

Only 23% of retailers provide a membership program for delivery benefits.

04 | 360-Degree Service

From Conflict Resolution to Customer Engagement

360-DEGREE SERVICE: OVERVIEW

Customer service as a differentiator and value driver.

Over the past 2–3 years, customer service has evolved from post-purchase issue resolution to an omnipresent medium of trust development.

In the omnichannel world, transparency, convenience, and relevant, personalized communications are pillars of trust and satisfaction. Can I track my order, along with the detailed service request, including complex scenarios involving third parties (like appliance installation)? Do you provide refunds for returns? Do you track queries and complaints through to closure?

Source: Incisiv Research

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WHY IT MATTERS

In the absence of physical interactions, customer satisfaction has to evolve from a call center resolution function to a proactive customer engagement and satisfaction engine that directly contributes to shopper loyalty.

95% of shoppers

remain loyal to a retailer with self-service return processes.

86% of shoppers

will pay 15% more for a seamless customer service experience.

68% of shoppers

are likely to use digital communication channels with store associates.

WHAT WE ASSESS

This section assesses all aspects of post-sales service, including the ease with which shoppers can contact customer service or get their queries resolved, return policies, and engagement practices.

22 total attributes assessed, including:

- Availability of self-help tools, including live chat options and FAQs.
- Information on product returns (in-store and online return policies, initiating and tracking returns).
- Ability to schedule and interact with brand experts (video/audio interactions).
- Availability of assisted shopping tools, product repair options, and the ability to book in-store appointments.



Leaders in 360-Degree Service.

Incisiv recognizes these 20 retailers and brands as leaders in **360-Degree Service** within and across retail segments.

Building upon a solid foundation of table-stake capabilities, they lead in the adoption of differentiated post-purchase service capabilities.

The full leaderboard is available at the end of this report.

Retailers rated as Omnichannel Experience Leaders in 360-Degree Service, in alphabetical order.

| | | | | |
|--|--|--|--|--|
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Department stores and consumer electronics retailers have the most advanced customer service capabilities.

Consumer electronics retailers have a high adoption of self-serve and assisted order canceling, and returns and refund options. Department stores have the most comprehensive live chat options.

Grocery and health and beauty retailers lag in the adoption of customer service capabilities.

Lowest Adoption



Highest Adoption

Grocery
27%

Live chat
Industry average adoption: 78%

Department stores
100%

Grocery
13%

Track returns online
Industry average adoption: 62%

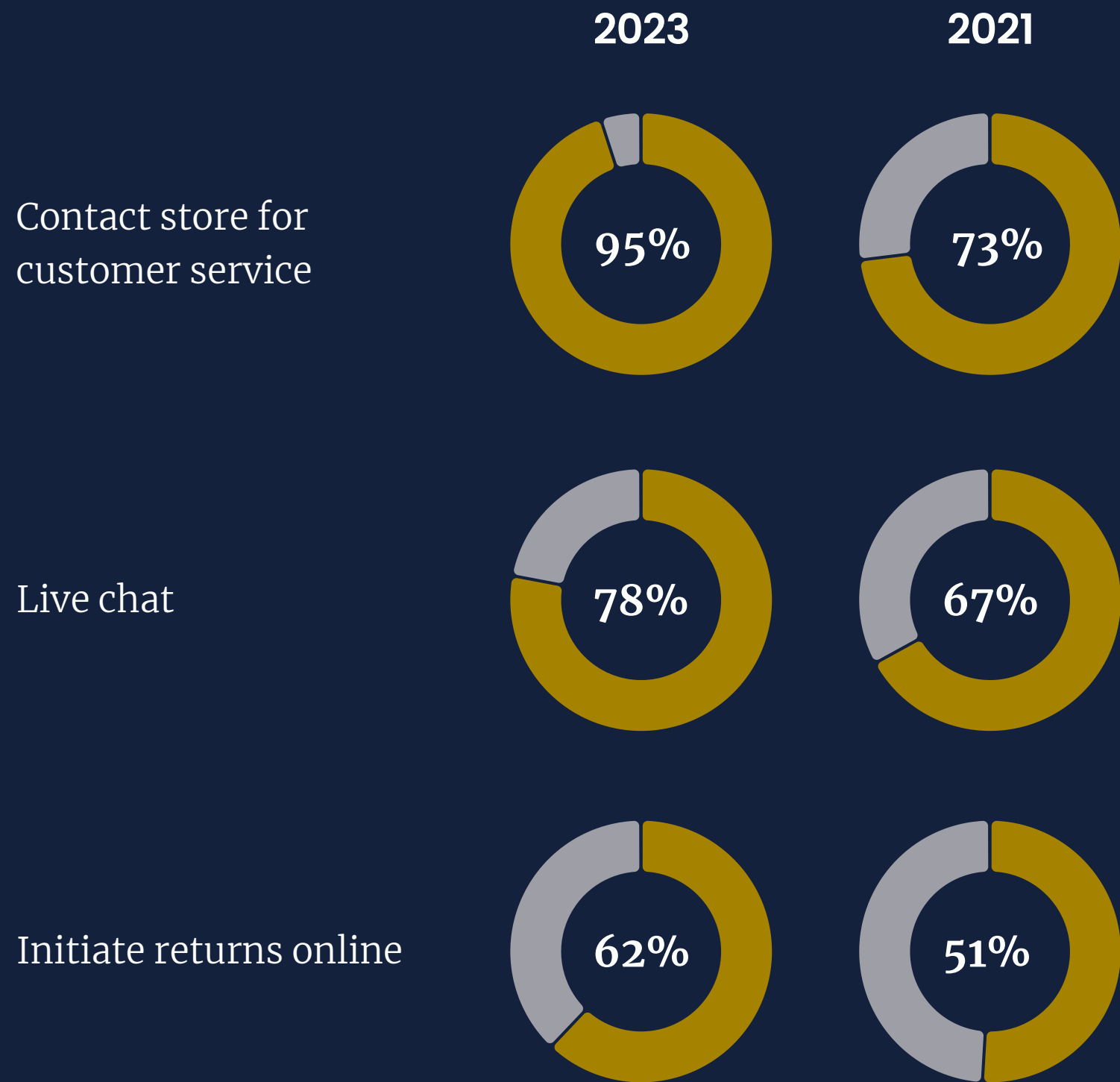
Consumer electronics
100%

Health and beauty
25%

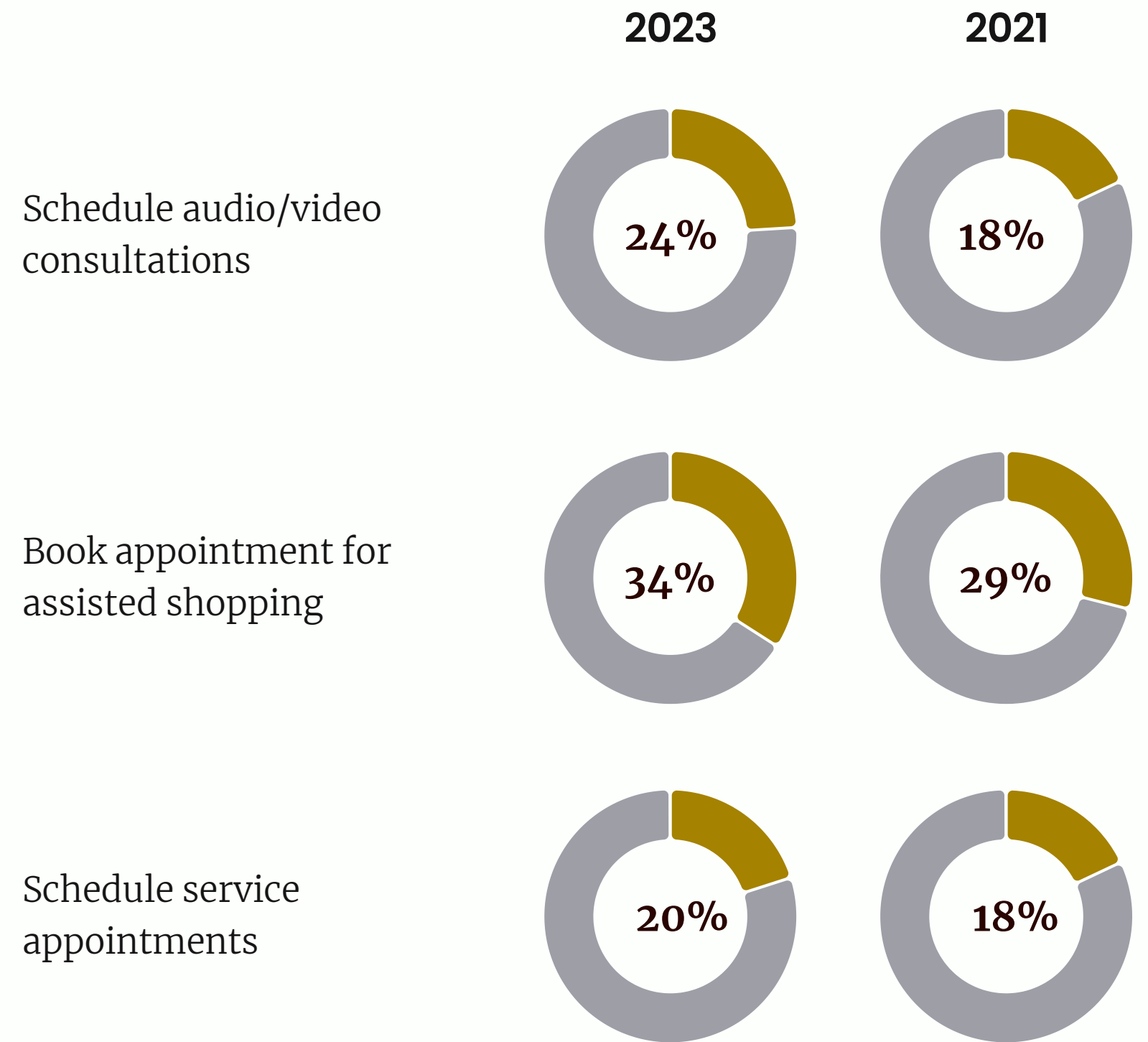
Cancel orders online
Industry average adoption: 50%

Consumer electronics
80%

Areas of high growth: self-help tools.



Areas of low growth: customer engagement.



Source: Incisiv Research

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360-DEGREE SERVICE: SPOTLIGHT

Ability to schedule a return pickup.

49% of shoppers actively check the retailer's return policy before purchasing and seek convenient options. The ability to schedule a return pickup gives shoppers flexibility and convenience. Currently, only 7% of retailers give shoppers the option of return pickups.

Return methods

There are four methods to return items. You'll see the option available for an item when you start your:

- **Schedule for pickup:** Have the item picked up for return.

Walmart offers shoppers various options for returns, including the ability to schedule the return pickup at their convenience.

Flexibility to modify orders before delivery or pickup.

30% of shoppers indulge in impulse buying and need the flexibility to edit their final order. At present, 23% of retailers currently provide shoppers access to make order modifications.

Changing or Canceling Your Order

Need to cancel an item or update your shipping address? Sign into your online account and visit Order Details to view any eligible self-service options to make updates within 45 minutes of placing your order.

If we're not able to cancel your order, you can easily [return your unwanted items](#) (no printer required).

GAP allows shoppers to modify orders until a specific time before the delivery or until the pickup process begins.

Spotlight: The Home Depot

The Home Depot provides its customers with comprehensive customer support, comprising live chat, contact via text message, and email. Additionally, it gives shoppers the option to schedule return pickups and the chance to drop off returns at a UPS location.



Text with Online Customer Support

To reach us for support, text SUPPORT to 38698 and start a conversation with our online customer care team. Message and data rates may apply. Message frequency varies. Reply HELP for help and STOP to stop.

RETURN IT FAST & EASY – JUST LIKE YOU BOUGHT IT

Simply take your purchase back to any Home Depot and get your money back

Self-help tools and returns

Retailers are amping up customer service by offering self-service options, as well as end-to-end issue tracking and closure.

81% of shoppers expect a full self-service support setup while making an online purchase, while 70% prefer chat-based customer support and only 25% prefer voice support.

Shoppers want their overall purchase experience to be smooth and seamless, making customer service essential.

Seamless returns are also an essential factor driving purchase considerations. Shoppers want the flexibility to be able to cancel or return their order if they feel dissatisfied.

Only 7% of retailers offer the option of scheduling return pickups.

Only 28% of retailers provide the option to drop off returns at UPS/Fedex/USPS locations.

Leaderboard



Leaderboard

As part of its 2023 Omnichannel Experience Index, Incisiv assessed 115 retailers across 7 different industry sub-segments. The complete list of assessed retailers is provided here.

Each retailer assessed was given an overall rating, as well as a functional area rating across research and discovery, online ordering, fulfillment, customer engagement, and service. Incisiv's analysis found:

- 20 Leaders
- 35 Challengers
- 36 Followers
- 24 Laggards

[Get in touch](#) to request detailed information about your rating, or to request a custom benchmark.

Apparel

7 For All Mankind
 Abercrombie & Fitch
 Aeropostale
 Allbirds
 American Eagle Outfitters
 Aritzia
 Calvin Klein
 Carter's
 Claire's
 Coach
 Foot Locker
 GAP
 Hanes
 J.Crew
 Levi's
 Men's Wearhouse
 Michael Kors
 New Balance
 Nike
 Ralph Lauren
 Stitch Fix
 Tommy Hilfger
 Tory Burch
 Under Armour
 Urban Outfitters
 Vans
 Victoria's Secret

Consumer Electronics

Apple
 Best Buy
 DELL Technologies
 Dyson
 GameStop

Department Stores

Belk
 Dillard's
 Hudson's Bay
 JCPenney
 Kohl's
 Macy's
 Neiman Marcus
 Nordstrom
 Saks Fifth Avenue
 T.J. Maxx

General Merchandise

Big Lots
 BJ's Wholesale Club
 Costco
 Dollar Tree
 Family Dollar
 Five Below
 Kroger
 Meijer
 Sam's Club
 Target
 Walmart

Grocery

7-Eleven
 Albertsons
 Casey's
 Giant Eagle
 Giant Food
 H-E-B
 Hy-Vee
 Ingles Markets
 Publix
 QuikTrip
 ShopRite
 Sprouts Farmers Market
 Wegmans
 Whole Foods Market
 Winn-Dixie

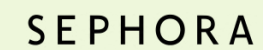
Health & Beauty

Bare Minerals
 Bath & Body Works
 CoverGirl
 CVS Health
 Estée Lauder
 GNC
 Kiehl's
 MAC Cosmetics
 Rite Aid
 Sally Beauty Supply
 Sephora
 Shiseido
 The Vitamin Shoppe
 Walgreens

Specialty

Ace Hardware
 Academy Sports + Outdoors
 Advance Auto Parts
 Ashley
 AutoZone
 Barnes & Noble
 Bass Pro Shops
 Bed Bath & Beyond
 Canadian Tire
 Chewy
 Crate & Barrel
 Dick's Sporting Goods
 Guitar Center
 Helzberg Diamonds
 Hobby Lobby
 Jo-Ann Stores
 Kay Jewelers
 Lowe's
 Mattress Firm
 Michaels Stores
 Office Depot
 O'Reilly Auto Parts
 Petco
 PetSmart
 Pottery Barn
 REI
 Staples
 The Container Store
 The Home Depot
 Tiffany & Co.
 Tractor Supply Company
 Williams Sonoma
 Zales

Leaders



Incisiv's 2023 Omnichannel Fulfillment Experience Index is based on insights from its proprietary digital maturity benchmarking methodology.

NEXT STEPS

- **Request a custom benchmark** for your brand
- **Share this report** with a friend or colleague via email or social media



ABOUT 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.

www.incisiv.com

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ABOUT BLUE YONDER

Blue Yonder is the world leader in digital supply chain transformations and omnichannel commerce fulfillment. Our end-to-end, cognitive business platform enables retailers, manufacturers and logistics providers to fulfill customer demand from planning through delivery.

Blue Yonder's Commerce and Order Management (OMS) solutions transforms customer experiences with an augmentative, microservices-based approach which delivers the rapid time-to-market, scale, and performance businesses need from inventory availability, order, orchestration, and fulfillment to help you gain a competitive edge.

Blue Yonder – Fulfill your Potential™

www.blueyonder.com



ABOUT MICROSOFT

Microsoft enables digital transformation for the era of an intelligent cloud and an intelligent edge. Its mission is to empower every person and every organization on the planet to achieve more.

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