Jobs Transformation Map for Singapore's Retail Sector

CONTENT

Preface

Mercer Singapore was commissioned by Enterprise Singapore (EnterpriseSG) and Workforce Singapore (WSG) to conduct a study on the retail sector in Singapore. The purpose of this study is to understand the current manpower composition of the sector, identify trends that influence manpower requirements including their impact on jobs and skills, and other related issues to improve the sector's ability to attract, upgrade and retain retail employees.

The retail industry is continuously evolving, primarily due to shifting consumer expectations, new retail models, digitalisation, and macroeconomic changes such as COVID-19 and geopolitical dynamics. These trends and macroeconomic factors imply that the retail industry will undergo significant changes and there is a need to understand how these will affect retailers and their employees. This study focuses on understanding how job roles in the sector will evolve and recommends measures to support retailers, ensuring that retailers and the retail workforce remain competitive globally and can adapt to a constantly changing environment.

Led by

Enterprise Singapore **WSg Workforce Singapore**

In partnership with

Mercer

1

INTRODUCTION

The Retail Sector Today

Singapore's retail industry is characterised by a diverse range of retailers from various sub-sectors, varying in size and business models. This sector plays a key role in contributing to Singapore's economic growth while also meeting the needs of Singaporeans by providing a wide range of goods and services. A glance at how the sector looks today:

Operating Revenue[1]	**Value-Added[1]**	**No. of Establishments[1]**	**Contribution to GDP[2]**
$46,055	**$6,417**	**29,300**	**1.3%**
Million	Million	Establishments	Of GDP

The retail industry has been in need of a transformation for an extended period. To address this, the Retail ITM 2025[3] has identified several crucial objectives and strategic areas of focus.

Strengthen Singapore's position as a vibrant lifestyle hub for global brands

- Partner global brands to introduce new retail concepts and products
- Encourage local and global brand collaborations to access new customer segments

Build global Singapore brands & support internationalisation

- Accelerate internationalisation through e-commerce and market access initiatives
- Strengthen brand equity and awareness of Singapore brands globally

Retail ITM 2025
A vibrant, globally-competitive retail ecosystem that excites Singaporeans and global consumers

Step up jobs & skills transformation & create quality roles for locals

- Build a strong pipeline of local talents to support new retail business models
- Encourage automation of manual tasks and streamlining of backend operations
- Support upskilling and reskilling for emerging roles such as digital marketing and data analytics

Rejuvenate retail by catalysing new experiential concepts & innovations

- Support establishment of brand experiential stores
- Catalyse product innovation to differentiate from global competitors
- Support companies to develop sustainability capabilities

Note:
1 – Key Indicators By Detailed Industry, Singapore Department of Statistics (2021)
2 – Gross Domestic Product At Current Prices, Singapore Department of Statistics, 2022
3 – Retail Industry Transformation Map 2025, EnterpriseSG

Context of This Study

The sector faces massive disruption and competition from local, regional and global retailers. Shifting consumer preferences, increasing digitalisation as well as macro-influences such as economic and political conditions are impacting the retail sector. To understand the type and extent of impact and outline how retailers and employees need to adapt to enable transformation, EnterpriseSG-WSG has commissioned Mercer to conduct a study on the retail sector.

This study seeks to deliver on the following key aims:
* Uncover current retail sector manpower composition and manpower challenges
* Identify key trends and impact on manpower demand and supply in the sector
* Outline anticipated impacts on retail jobs and skills
* Identify emerging jobs in the retail sector
* Identify attraction, attrition and retention factors within the sector
* Develop pathways for the sector to advance (productivity, internationalisation, human capital recommendations)

Approach for this Study

During this study, we conducted both quantitative and qualitative research across local, regional, and global sources to 1) comprehend and identify the trends impacting the retail sector, and 2) form initial hypotheses on the impact on jobs, skills, and manpower requirements. To validate these hypotheses, sector engagement activities were undertaken to enhance our understanding of the sector's context and challenges. Subsequently, with these inputs and validation, the study outlined the impact on jobs and skills, manpower requirements, and proposed suggestions for the industry's advancement.

| Inputs	Engagements	Outputs
• Key Sector Trends and Sub-trends	• Mercer's Retail Sector-Wide Surveys	• Jobs and Skills Impact Analysis
• Sector Data and Indicators	• Retail Thought Leadership Interviews	• Retail Sector Manpower Analysis
• Global and Regional Retail Trends and Reports	• Industry Focus Group Discussions	• Recommendations
	• Interviews with Associations and Government Agencies	

Key Trends Identified

Throughout the course of this study, we have identified and anchored 4 key trends that are impacting the retail sector. These key trends, along with their sub-trends, are driven by a variety of external factors which together, shape the future of the retail sector.

CONSUMER OF THE FUTURE
Shifting consumer preferences and lifestyle patterns are leading to increased demand for sustainability, personalised products or services and convenient shopping experiences.

NEW RETAIL MODEL
Retail models are evolving with an increasing emphasis on integration between online and offline channels, and redesigning store experience to prioritise customer needs and preferences.
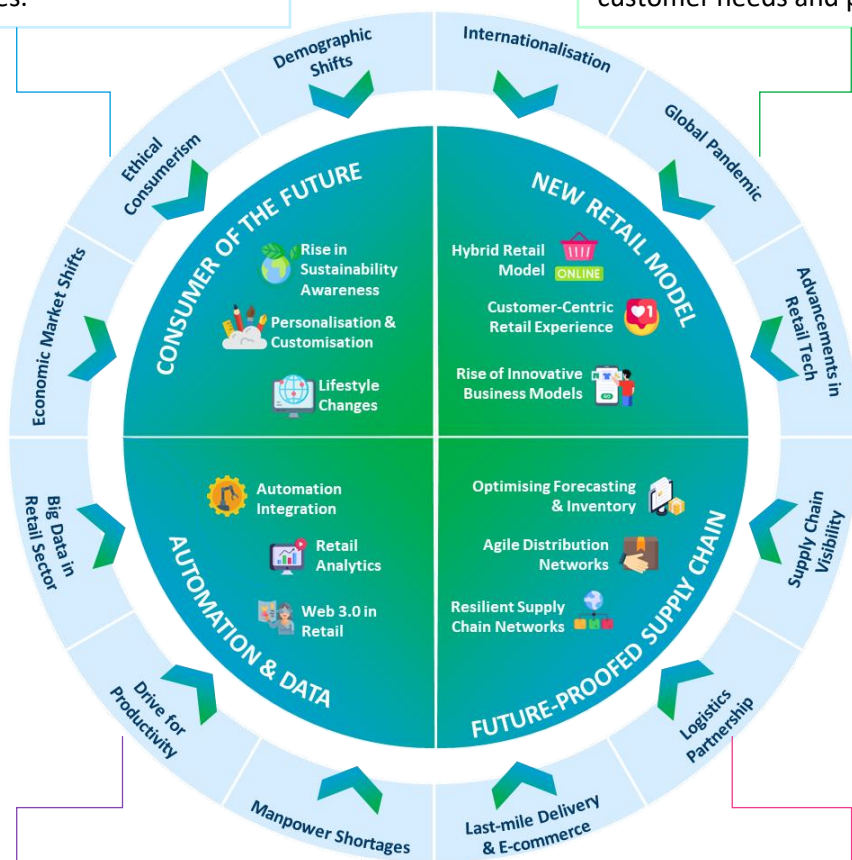
AUTOMATION & DATA
The emergence of big data and advancements in retail technology have enabled retailers to boost their productivity and leverage data analytics to inform their decision-making processes.

FUTURE-PROOFED SUPPLY CHAIN
Supply chains are becoming increasingly complex and retailers are striving to improve inventory management, provide more fulfilment options and establish a more resilient supply chain.

Key Challenges Uncovered

Our research and stakeholder engagement also revealed some pain points faced by retailers and employees. We have uncovered 3 key challenges present in the retail sector today.

Transformation fatigue

The sector has been undergoing significant changes in recent times, driven by the implementation of digital technology and big data, as well as consumers' increasing demand for sustainable products, unique retail experiences and efficient customer service.

Due to these, retailers are constantly searching for novel transformation initiatives and must promptly adapt to them. As a result, they may **experience exhaustion from the frequent changes and face difficulty in keeping up** with them.

Value proposition of the retail sector

The **retail sector is perceived unfavourably at times**, with some viewing the sector as failing to keep pace with transformation and changes. Retail work can also be perceived by the public as unexciting, inflexible, and lacking in opportunities for career advancement.

There is a **fundamental need to change the perceptions of retailers, employees and the general public in Singapore**, which requires concerted efforts from various parties.

Manpower shortage & reskilling challenges

As the sector transforms, **retailers require specific critical skills and capabilities** to sustain their operations and remain competitive. However, talents with the right skillsets are difficult to attract, particularly with intense competition from other sectors and the gig economy, leading to manpower shortages for retailers.

In addition, the COVID-19 pandemic has aggravated the manpower shortage issue as a **significant number of retail workers, whether local or foreign, have left the industry permanently.**

Overview of Impact Assessment

Considering the mentioned trends and challenges, we have assessed their impact on retail job roles and the required skills. This study analysed a total of 16 jobs within the retail industry. Based on our impact assessment, we have identified the following:

4 High Impact Roles

- ► Sales Associate
- ► Sales Supervisor
- ► Merchandising Executive
- ► Merchandising Manager

10 Medium Impact Roles

- ► Store Manager
- ► Retail Operations Director
- ► Marketing Executive
- ► Marketing Manager
- ► E-commerce Executive
- ► E-commerce Manager
- ► Warehouse Operations Manager
- ► Logistics Operations Analyst
- ► Visual Merchandiser
- ► Brand Manager

2 Low Impact Roles

- ► Brand Executive
- ► Logistics Solutions Specialist

HIGH IMPACT

Job role will experience **significant changes.**

Majority of existing tasks will be **substituted by technology** and processes related to the role will **transform rapidly**. Many new tasks and skillsets will emerge while existing ones could be made redundant.

MEDIUM IMPACT

Job role will experience **moderate changes.**

Some existing tasks will be performed through a **combination of technology and incumbent.** While some of the existing tasks and skills will become redundant, there will also be **demand for new tasks and skills** for the role.

LOW IMPACT

Job role will experience **slight changes.**

Majority of existing tasks will continue to be **performed by incumbents** and processes related to the role are **unlikely to change**. The tasks and skills required of this role remains largely unchanged.

Overview of Emerging Jobs

In addition to the current job roles, we have identified nine emerging positions that will become increasingly important for the retail sector. These emerging roles are anchored along 2 core capability areas: customer-centricity and technology innovation.

Customer Centricity

These roles centre on improving customer experience, supporting customers and keeping customer preferences and demands top-of-mind when planning actions and strategies.

Specialist Roles	Cross-Functional Roles
• Sustainability Specialist • Product Innovator	• Customer Experience Manager • Omni-channel Manager

Technology Innovation

These roles utilise technology and data to optimise existing processes and improve current ways of working to better adapt to changing customer expectations and new trends in the sector.

Tech-Lite		Tech-Heavy
• Digital Marketer	• Digital Transformation Manager • UI/UX Designer • Customer Intelligence Analyst	• Full Stack Developer

Outlook of Recommendations for the Retail Sector

The retail sector will continue to face headwinds from intensified global competition, the drive for enhanced productivity and the need to attract and retain retail talents. In light of these challenges and the sector's transformation agenda, we have identified 3 critical pillars of recommendations for the sector. These recommendations aim to highlight the required changes for the sector and the potential roles that different stakeholders can play in driving Singapore's retail sector forward.

3 PILLARS OF RECOMMENDATION

Productivity Reimagined

Redefine ways to **assess productivity** in alignment with the changing retail models

Uplift **HR's capabilities** to support a sustainable retail workforce for the long run

'Going Global' Initiatives

Pursue global markets with an appropriate mode of internationalisation entry to unlock new success

Invest in **key job roles** and support skill building for these roles that enable the internationalisation journey

Human Capital Development Plans

Redesign retail jobs and **establish career development pathways** to support incumbents in undertaking value-added activities

Enhance Employee Value Proposition (EVP) and **employer branding** to attract and retain retail talents

Adopt n**ew workforce models** and tap on alternative **talent supply sources** to meet manpower demand in the sector

How to Read the Report

This jobs transformation map report is a comprehensive document that is designed to cater to multiple different audiences. Given the nature of this study, it includes a diverse range of information that ranges from high-level overviews of key findings through to detailed recommendations on how retail jobs and skills will evolve.

In the infographic below, we have outlined some examples of where you can "jump" to in this document if you are looking for specific information.

FINDING YOUR WAY TO CONTENT THAT IS MOST RELEVANT TO YOU

I'm a retail leader who is thinking about our strategy for the future; I would like more information on what is driving change in retail and what the future might look like.

A few different chapters could be helpful. Chapter 2 could help to set the context on the current state of the retail landscape. Chapter 3 outlines the key trends impacting the retail sector in detail, and Chapter 4 looks at a range of scenarios for the retail sector in 2030.

I'm a retail leader who is trying to map out how the changes in the sector will impact the jobs and skills of my team members.

Chapter 6, "Jobs and Skills Transformation", maps out the implications of the key trends affecting retail from a jobs and skill perspective. This chapter provides more information on which jobs will be most impacted and gets into the detail of how tasks and skills will evolve.

I have worked in the retail sector for a few years and I'm trying to understand how my job might change in the future and what new skills I could learn.

In Chapter 6, "Jobs and Skills Transformation", you can learn more about how job roles across retail functions are changing. This chapter includes Job Dashboards which provide a summary view and more detailed documents that outline changes at a task and skill level.

I'm a retail business or HR leader that is struggling to hire and retain staff; I want to learn more about what motivates employees in this sector and what changes we could make.

In Section 1 of Chapter 5, "Understanding the Retail Workforce of Today", you can learn more about how to attract and retain retail talent. In Section 3 of Chapter 7, 'Human Capital Development Plans" you can find recommendations for retailers who want to transform.

I'm retailer who is thinking about how to grow my business beyond Singapore; I'd like to learn more about how to do this and the jobs / skills that would help this be successful.

In Section 2 of Chapter 7, "Going Global Initiatives", you can learn more about different modes of entry that might be suitable and the specific jobs and skills that can support this.

2

THE RETAIL LANDSCAPE: TODAY

2.1	**Overview of Current Retail Sector**
2.2	**COVID-19 & Impact on the Retail Sector**
2.3	**Current Workforce Challenges**

The Retail Sector in Singapore

Globally, retailers continue to evolve as they strive to maintain their economic advantage in an increasingly competitive landscape. In Singapore, the retail industry is at a critical juncture. Retailers need redefine their future strategic plans and develop innovative products and services to strengthen Singapore's position as an attractive retail destination.

Today, the sector comprises of mostly small and micro retail enterprises.

25,200 Number of Enterprises[1]	**98%** Small and Micro Enterprises[1]

A diverse sector with multitude of players

The retail sector is one that is diverse with retailers with distinct characteristic and value propositions. As such, a set of archetype factors have been developed to guide retailers in understanding their unique characteristics and qualities.

<u>Archetype Factor</u>	<u>Types of Identifier</u>				
Revenue Size	Micro (<S$1 mil)	Small (S$1 mil– S$10 mil)		Medium (S$10 mil – S$100 mil)	Large (>S$100 mil)
Sub-sector	Fashion & Sporting Goods	Supermarket & Convenience Stores	Consumer Electronics	Jewellery & Timepieces	Furniture & Household Equipment / Department Stores
Brand Ownership	Brand Owner			Non-Brand Owner	
Digital Maturity	Digital Novice		Digital Player	Digital Leader	

Note:
1 – Singapore Department of Statistics, 2021. Small and micro enterprises are defined as enterprises with operating revenue not more than $10mil.

| 2.1 | Overview of Current Retail Sector |

The Retail Workforce in Singapore

The retail sector continues be a significant driver of Singapore's socio-economic impact, accounting for 4.2% of the workforce[1]. However, in recent years, the industry has seen a decline in operating revenue and value added with a shrinking retail workforce size. While black swan events such as the COVID-19 pandemic had significant impact on the consumer demand and the productivity of the workers, it also amplified the fragility of the current retail workforce, as employees permanently left the retail industry.

Current retail sub-sectors breakdown[2]

Supermarkets & Convenience Stores

Fashion & Sporting Goods

Furniture & Household Goods

Consumer Electronics

Department Store

Jewellery & Timepieces

Other sub-sectors include cosmetics, stationery, books and gifts

Increased manpower pressures faced by retailers

While current workers' operational productivity has been fairly optimised, the retail workforce is experiencing a declining workforce size, lower operating revenue and increased cost pressure in recent years. From 2018 to 2020, the retail industry's value added (VA) per worker reached a tipping point, as it saw a 2.5% decline in 2019, followed by a further 16% decline in 2020 due to the COVID-19 pandemic[3].

Shrinking retail workforce: **8%** decline since 2016[4]

11% decline in VA per hour worked since 2017[5]

Note:
1 – Ministry of Manpower. Singapore Yearbook Of Manpower Statistics 2022, Retail Trade
2 – For the purposes of this study, the Retail Sector does not include motor vehicles, petrol stations, hawkers, and stall-holders.
3 – Changes In Value Added Per Worker In Chained (2015) Dollars, Singapore Department of Statistics
4 – Employed Residents Aged 15 Years And Over By Industry (June), Singapore Department of Statistics
5 – Value Added Per Actual Hour Worked In Chained (2015) Dollars By Industry, Singapore Department of Statistics

Existing Retail Sector Transformation Efforts

While the retail sector continues to make direct and indirect contributions to the Singapore economy by positioning itself as an attractive tourist destination, the sector has undergone major shifts. Consumer lifestyle and shopping behaviours have changed, driving retail sales to record low levels. Retailers have been investing in productivity enhancements to optimise costs and expanding their businesses internationally to cope with the sector's challenges.

1

Stagnated Retail Sales

The retail industry has been facing slower consumer demand due to macroeconomic factors, accelerated by the global pandemic.

Annual Retail Sales Index[1]

2015 2016 2017 2018 2019 2020 2021 2022
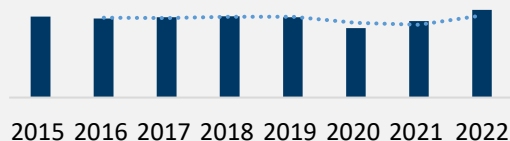
2

Permanent Shifts in Consumer Behaviour

While online sales peaked during the COVID-19 pandemic, market trends have affirmed that consumers are demanding for more and efficient online retail experiences.

Monthly Online Retail Sales Proportion[2]
% of Total Retail Sales

26 — Circuit Breaker

19 — Phase 2 HA
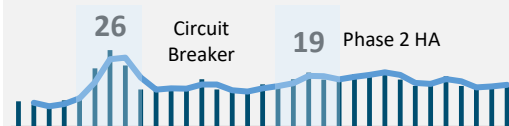
3

Ongoing Transformative Journey

Retailers have experienced significant spike in online sales demand, and have to seek innovative opportunities to improve the online experience of retail as they look to expand and continue to attract consumers.

4

Productivity Improvements

Overall, there has been a push towards enhancing productivity in the sector. Retailers are increasingly embracing technologies such as automation and data analytics and redesigning existing job roles to minimise manual work. These measures help retailers address manpower shortages and rising cost pressures.

5

Internationalisation

Rise of e-commerce platforms along with intensified competition in the domestic market has prompted retailers to look beyond and expand their business overseas to reach new customer bases.

Note:
1 – Annual Retail Sales Index, Singapore Department of Statistics (2015 to 2022)
2 – Monthly Online Retail Sales Proportion, Singapore Department of Statistics (Nov 2019 to Jul 2022)

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| 2.1 | Overview of Current Retail Sector |

Reviewing Productivity in the Retail Sector

The retail sector has traditionally relied heavily on manpower, but with the mounting challenges of manpower shortages and rising costs, there has been a push towards enhancing productivity. This drive aligns with the launch of the Retail Industry Transformation Map (ITM) in 2016, which aimed to assist retailers in uplifting productivity and embarking on digital enhancements.

Since the ITM launch in 2016, some of the productivity initiatives include using **technology and automation** to eliminate transactional work, **leveraging on data to make faster and better decisions** among areas of inefficiencies, and focusing on the workforce by **redesigning jobs and keeping workforce engaged and motivated[1].** Moving forward, these digital and process transformations will continue to drive the evolution of productivity measures, as retailers find new ways to measure and evaluate their efficiency.

>**7,000 Retail SMEs** embarked on productivity improvement projects since 2018

90% Retail SMEs had adopted at least one digital solution
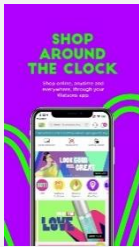
Key themes of retail transformation:

Automation & Digitisation

Data-driven Decisions

Job Roles Redesigned

Watsons[2] launched an application that enables customers to make contactless, queue-free payment. The store also incorporated self check-out kiosk in an effort to reduce manual check-out process.

Data analytics can help retail employees make better decisions. For instance, data analytics could be used to **forecast ordering and stock replenishments**, helping to reduce inefficiencies in stock planning.

Smart scheduling solutions utilise workforce data and predictive modelling to help managers plan ways to optimise their manpower based on demand patterns.

Sephora[3] places emphasis on its people, helping them to find meaning in the work they do. They have redesigned roles to reduce transactional work, focusing attention on providing beauty advice to customers. This helps employees to remain engaged and motivated to help Sephora succeed.

Other JR initiatives[4]:
- Benjamin Barker
- Sheng Siong Group
- Star International

Note:
1 – Retail ITM 2025 Media Release, EnterpriseSG (2022)
2 – Watson accelerates launch of Watsons GO touchless payments system, South China Morning Post (2020)
3 – Sephora to launch first Store of the Future concept in Asia, Inside Retail (2020)
4 – Job Redesign for the Retail Sector, Workforce Singapore

Reviewing Productivity in the Retail Sector

As the retail sector take steps to improve its productivity, retailers have and can embark on key initiatives across various retail job functions. Retailers are implementing tools and initiatives across their different functions, with the aim of transforming and enhancing their business operations. A number of the tools and initiatives are outlined in the table below.

Business Function	Productivity Tools & Initiatives
Marketing & Brand Management	Deploying **market analytics** and **automated tools** to improve ads targeting and automate marketing processes. • *Search engine optimisation* • *Lead generation and attribution* • *Automated ad management tool (e.g. purchasing digital ads, ads targeted at specific demographics)*
Merchandising	Utilising **customer analytics** to drive quicker and better merchandising decisions (e.g. identifying product and pricing trends): • *Dynamic pricing tools* • *On-demand consumer purchasing data and pattern analysis*
Retail Operations	Implementing **digital platforms / tools** to reduce manual or repetitive tasks: • *Electronic queue management systems* • *Omni-channel point-of-sales system integration* • *Digital payment systems*
E-commerce	Embedding digital tools or add-ons to e-commerce operations or technologies to create **automated workflows** and drive **better decisions**: • *Chatbots and Intelligent virtual assistants* • *Product recommendation systems*
Supply Chain & Logistics	Integrating robotic process automation (RPA) and AI in retail distribution and inventory management to **increase agility and accommodate multi-channel purchases and delivery modes**: • *Real-time inventory management software* • *RPA data-entry automation*

Singapore Retail Goes Global

As most retailers embark on their journey to transform productivity, some retailers have also turned to internationalisation to seek new opportunities. 'Going Global' refers to the process of entering new overseas markets through global expansion while 'Being Global' refers to the state of business, operations and workforce integration that optimises a company's performance as a global entity. In the past, internationalisation may seem risky and challenging. Today, with different modes of entry and support available, retailers have been reaping the benefits of going global in different ways.

1

Drivers From Global Economy

Untapped opportunities in developing markets
There is expected consumer market growth in developing countries that have already spent more than $5 trillion USD a year[1].

Boom in global exports market
Globally, exports of goods and services accounted for an average of 28.9% of countries' GDP[2]. In particular, Singapore stood out as exports represent a significant portion of GDP.

Changing consumption patterns
As consumers gain access to retailers across the globe, there is an increase in demand for retail goods from the overseas market that retailers can stand to benefit from.

2

Benefits For the Business

Growing the business
An overseas expansion provides new opportunities for growth. This is especially so in emerging markets with growing middle-income groups with greater spending capabilities.

Increased competitiveness
Retailers could benefit from developing stronger capabilities, knowledge and networks. Going in early also enables companies to reap the benefits of being a first mover.

Access to global talent pools
A wider pool of talent can be accessed for specific skills that cannot be attained locally.

Note:
1 – Global Consumption Database, The World Bank
2 – National Accounts Data, The World Bank

Singapore Retail Goes Global

Top destinations for retailers

Singapore-based retailers are investing in markets of different sizes. In particular, investments in China topped the table, indicating potential market opportunities. While many retailers prefer to invest in neighbouring countries such as Thailand, Malaysia and Indonesia, retailers have also ventured into European cities such as Netherlands and United Kingdom.

Top investment destinations for Singapore-based retail and wholesale trade investment, 2021 (Million SGD)

Country	Value (Million SGD)
China	20,817
Netherlands	17,108
India	14,759
Hong Kong	10,632
Thailand	9,576
Australia	6,474
United Kingdom	5,219
Indonesia	4,728
Malaysia	3,997

Note:
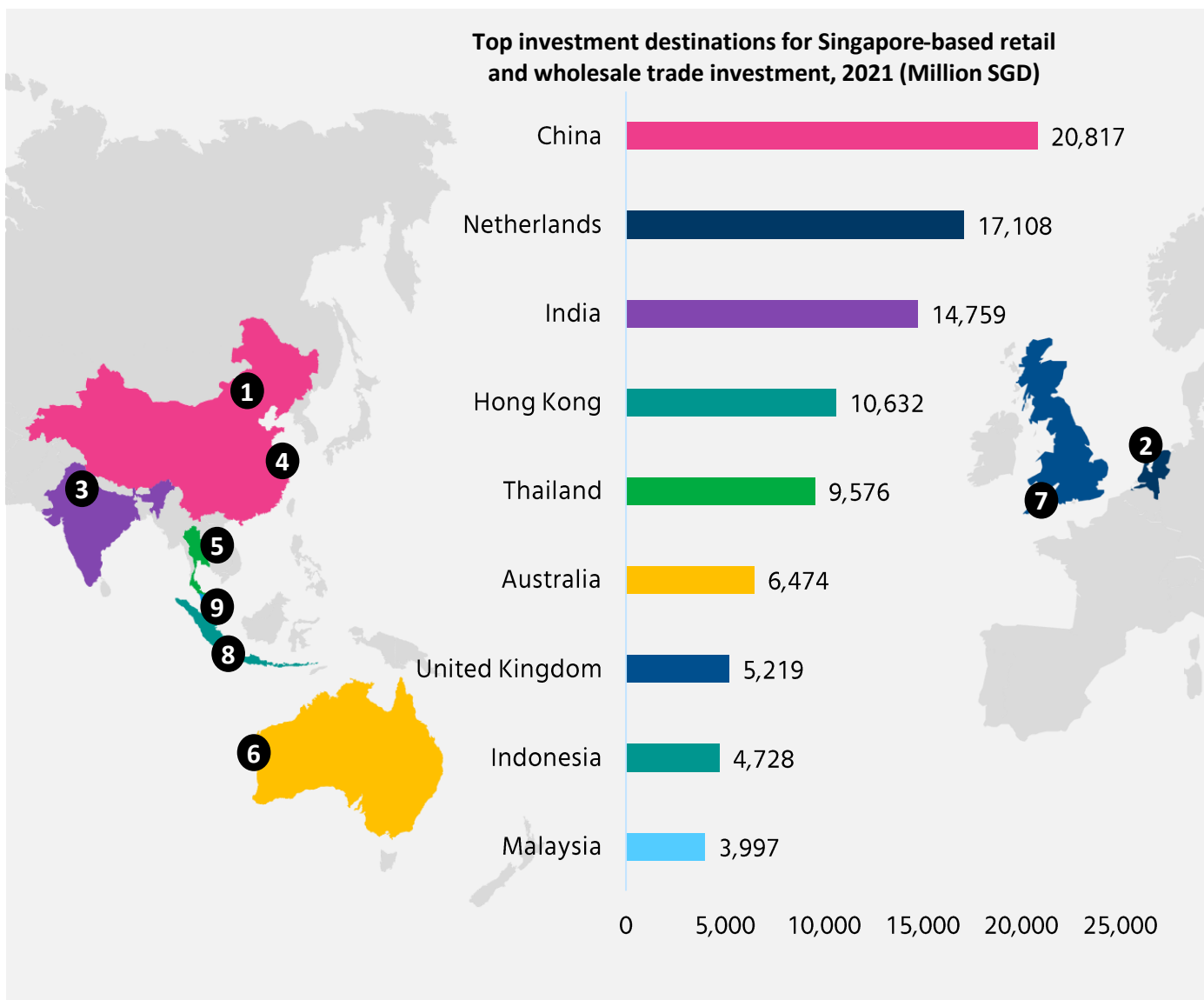1 – Singapore's Direct Investment Abroad, Singapore Department of Statistics

| 2.1 | **Overview of Current Retail Sector** |

Singapore Retail Goes Global

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1 China

- According to SBF's National Business Survey 2020/2021, China is ranked among the top three countries that businesses have identified in their expansion plans[1].

- Besides being the world's most populous country, the rise in the middle-class segment and Gen Z consumers in China will drive demand for consumer products such as premium clothing. This means that local retailers should capitalise on such demand and capture these market opportunities.

2 Netherlands

- Located at the centre of Europe's largest markets, the Netherlands' openness makes it a key transport hub for retailers to expand.

- The European Union-Singapore Free Trade Agreement[2] provides strategic advantage for retailers to continue to expand and leverage on its strong trade and connectivity to the rest of the world.

3 India

- India emerges as the third most popular destination for local retailers to invest in and Singapore was India's 10th largest trading partner.[2]

- India has been investing heavily in infrastructural development, building digital capabilities and upskilling the local workforce to attract investors.

- Consumers in India have also been demanding higher quality experiences and services. In particular, younger consumers have been purchasing from foreign brands and imported goods.

4 Hong Kong

- Hong Kong remains a popular destination for local retailers. As an international city, Hong Kong attracts a variety of consumers with diverse tastes and preferences, representing ample opportunities for retailers.

- Local fashion retailer, Love Bonito recently expanded to Hong Kong and has been experiencing exponential year-on-year growth for the past three years.

Note:
1 – National Business Survey 2020/2021, Singapore Business Federation
2 – Go Global Market Guides, EnterpriseSG

Singapore Retail Goes Global

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5
Thailand

- Thailand is the second largest economy in Southeast Asia with well-developed infrastructure and a growing middle-class of consumers who are looking for new experiences and products.

- After seeing the popularity of the brand, one of Thailand's largest mall operators, The Mall Group, proposed a joint venture with local fashion retailer, Beyond The Vines, to introduce the brand into its luxury department store.

6
Australia

- Local businesses may prefer to invest in a stable, low-risk destination such as Australia. The country prides itself on strong regulatory frameworks and provides a secure and well-supported environment for foreign brands to thrive in.

- Australian consumers are becoming more intentional with their purchases, such as buying from brands that offer recycling or upcycling[1]. There are opportunities for local retailers to enter the market and provide such a value proposition for Australian consumers.

7
United Kingdom

- Boasting a densely populated and affluent population, there has been growing demand for unique and diversified retail experience, focusing on sustainability and social equality[1].

- Retailers with a unique lifestyle or brand value proposition could anchor on the growing consumer demand to support its expansion.

8
Indonesia

- Indonesia has the largest economy in Southeast Asia with great opportunities for investment. Based on data from Enterprise Singapore, bilateral trade between Singapore and Indonesia amounts to SGD$48.8 billion. [1]

- With the majority of its population under the age of 24, the country expects to see a huge growth in demand for e-commerce shopping and foreign brands in the near future.

9
Malaysia

- The close physical proximity and cultural similarities make Malaysia an ideal location for local retailers to internationalise. Malaysia ranked 2nd on Singapore's trading partner rankings, illustrating the strong bilateral relations and economic interdependence between the two countries.[1]

- Based on a study, 36% of Singapore-based companies had indicated Malaysia as their destination of choice for overseas expansion in the next 2 years.[2]

Note:
1 – Go Global Market Guide, EnterpriseSG
2 – Singapore-based companies eyeing Malaysia for regional expansion, The Star Malaysia (2018)

Immediate and Long-term Changes due to COVID-19

In 2020, the onset of the COVID-19 pandemic amplified the disruptions already present in the retail sector. Consumer behaviours, preferences and business operations drastically shifted as safe management measures were imposed on international travel and daily social interactions.

Within the retail sector, there were also shifts such as changes to business operations, ways of the managing retail workforce and the adoption of new sales channels.

Changes to Key Business Operations	**Shifts in Retail Mobility**	**Rise in Online Commerce**

- Implementing safe management measures such as Vaccinate or Regular Test (VoRT) regime and reducing store capacities as customers steered away from physical stores.

- This resulted in Singapore's Retail Sales plunging by 13.3%[1] year-on-year in March 2020, representing the greatest drop in 22 years.

- As Singapore went into lockdown, retail operations ceased and employers had to manage the expectations of their retail employees.

- The pandemic also accelerated the movements out of the sector, with retail employment experiencing the largest YOY decline[2] in the first half of 2020.

- With restrictions in place, many consumers opted for alternative sales channels such as online commerce to purchase products at their convenience.

- It is estimated that the e-commerce sector in Southeast Asia will surpass $200 billion by 2025, growing significantly from only $43 billion in 2019[3].

Note:
1 – Annual Retail Sales Index, Singapore Department of Statistics
2 – Employed Residents Aged 15 Years And Over By Industry, Singapore Department of Statistics
3 – e-Conomy SEA 2022, Google, Temasek and Bain

2.2   COVID-19 & Impact on the Retail Sector

COVID-19 Acted as an Accelerator of Existing Trends

Digital Operations

- Large increase in e-commerce operations and last-mile delivery operations
- Increasing need for using digital systems to gather insights on customer behaviour that inform inventory and marketing activities
- Rise of social commerce and client communication strategies

Changing Consumer Demands

- Surging demand for online shopping
- Growing expectations for personalised marketing across often new channels
- Evolving expectations of in-store experiences, with a focus on experiential elements
- Shifting consumer needs for products based on stark changes in lifestyle and day-to-day needs

Multi-channel Commerce

- Increase in demand for digital skills across functions
- Increase in contactless shopping and pickup / delivery services
- Consumer expectations focusing on seamless multi-channel experiences
- Brick and mortar stores shifting to focus on executing creative concepts

Impact on Retail Workforce

Diversified labour pool

- Progressive Wage Model for retail being proposed to attract and retain local talent
- Supporting mature workers in the retail sector
- Upskilling and career development opportunities to be created across sector

New normal

- Safety of employees while maintaining business as usual operations
- Workforce augmentation and upskilling
- More decentralised/localised operations
- Building hybrid retail capabilities

Mercer

The Retail Sector Faces 3 Key Challenges…

In light of the trends and disruptors, the retailers, associations and employees have highlighted several key common challenges they will face as the sector strives for innovation and rejuvenation.

Challenges	Current state in the sector	What does this mean for retailers
Alleviating transformation fatigue	• The **retail industry has undergone multiple transformation journeys** due to the changing consumer demands and the introduction of technology. • The fragmented nature of the sector means that **retailers have to navigate their own transformation journey** as solutions are often not easily replicable across the various retail archetypes.	• To avoid transformation fatigue, **retailers have to adopt an experimental approach with clear objectives and hypotheses**, using guiding principles to weigh investment risks against achieving productive transformation. • It is also critical for retailers to **consider implementing change management activities** to encourage employees to embark on the transition.
Redefining the sector's value proposition	• Job seekers **value strong organisational branding, clear career progression opportunities and responsible rewards practices** when joining a retail organisation[1]. • Importantly, they want to **work for retailers whose brands' values resonate with their personal beliefs**, making their work much more purposeful and meaningful.	• Retailers need to **redefine the value they can offer employees** by focusing on doing things like investing in paying employees fairly, building clear frameworks for career progression and defining their employer brand and purpose.
Developing a future-ready workforce with transferrable skills	• As the sector continues to transform, a diverse range of employees in the sector need to develop skills across both **technical and customer-centric capabilities** to deliver high quality services and attractive products. • **Retail job roles will become multi-dimensional** with a demand for cross-cutting skill sets such as data analytics.	• To stay competitive in the sector and to retain retail talents, retailers need to begin thinking about **what are the critical skillsets required and how to support existing employees in upskilling.**

Note:
1 – Mercer's Retail Manpower Study Surveys

3
TRENDS IN THE RETAIL SECTOR

Our Approach to Identifying Key Trends Impacting the Sector

Through our desktop research and industry engagement with over 90 retailers and associations, we have identified 4 key trends that will impact the retail sector in the future. Driven by macro-factors and influences across the globe, these key trends jointly shape the future of the retail sector.

Demographic Shifts

Internationalisation

Ethical Consumerism

Global Pandemic

Economic Market Shifts

Advancements in Retail Tech

CONSUMER OF THE FUTURE

- Rise in Sustainability Awareness
- Personalisation & Customisation
- Lifestyle Changes

NEW RETAIL MODEL

- Hybrid Retail Model
- Customer-Centric Retail Experience
- Rise of Innovative Business Models

AUTOMATION & DATA

- Automation Integration
- Retail Analytics
- Web 3.0 in Retail

FUTURE-PROOFED SUPPLY CHAIN

- Optimising Forecasting & Inventory
- Agile Distribution Networks
- Resilient Supply Chain Networks

Big Data in Retail Sector

Supply Chain Visibility

Drive for Productivity

Logistics Partnership

Manpower Shortages

Last-mile Delivery & E-commerce

1

Consumer of the Future

Consumers are changing the way they consume and purchase. They are becoming more aware of the impact of their purchases, demanding a greater degree of curation and are looking for seamless and convenient experiences.

1. Rise in sustainability awareness

Increasing social and environmental consciousness	**Change in Operations**
Consumers are becoming more mindful of what and how much they consume and their impact on the environment and society.	Nike Flyknit is engineered with an average of 60% less waste[1] than in traditional footwear upper manufacturing.
Consumers are better informed on sustainability issues and are driving the demand for more sustainable production from retailers.	

2. Change in consumers' preferences

Increasing demand for personalisation & customisation	**Providing customisation services**
Consumers are demanding for personalised products or brands that allow them to customise their products before purchase.	Luxury brands[2] such as Dior and Fendi are introducing bespoke customisable services for their products.

3. Lifestyle changes

Evolving lifestyles with shifts like remote working	**New strategies to attract consumers back to physical stores**
There is a steady upward trend for e-commerce, with projections for e-commerce consumers reaching 4.1 million users[3] by 2025.	Buy online and pick up in stores or provide inventory information online to attract consumers back to physical stores.

Note:
1 – Nike: Sustainability and Innovation through Flyknit Technology, 2016
2 – Millennials are demanding exclusive bespoke services, and luxury brands like Fendi and Ettinger are listening, South China Morning Post (2019)
3 – Digital Market Insights: eCommerce Singapore, Statista

| 3.2 | **Key Trends in the Retail Sector** |

Rise in sustainability awareness

What are we seeing?

Rise of Conscious Consumerism

Emphasising purchase decisions that have a positive social, economic and environmental impact.

- Consumers have become more conscious of the purchasing decisions, making purchases with a stronger purpose and intent.

- Concerns about product origins, purchasing products that do not impact the environmental and social causes they believe in.

- Consumers are more willing to spend on products that encourages sustainability, and reduce reliance on single-use products.

The Empowered Consumer

Armed with knowledge on sustainability, consumers today are exerting pressures on retailers to shift towards a more sustainable operations.

- Getting involved in sustainability initiatives such as recycling old products and purchasing responsibly.

- Seeking an authentic relationship with brands that are transparent on their sustainability practices.

- With access to multiple sources of information, consumers can now verify the product sources before making the purchase.

- The empowered consumer is a global shopper and can patronise brands and services that align with their values.

How are retailers adapting?

Brands have to be more transparent and provide information about their products and environmental impact. It is not acceptable to pay lip service to sustainability and use only marketing to project progress, be it through environmental greenwashing or performative social justice. Consumers are more conscious and vocal about their purchasing decisions, and are willing to call out empty marketing claims.

H&M established a sustainability lab to drive new innovations and materials prior to scaling for the general product inventory.

TIFFANY & CO. Tiffany & Co. launched a new product range[1] made from recycled gold and established its own chain-of-custody controls, becoming the first global luxury jeweller to disclose the countries of origin of its newly sourced, individual diamonds.

Note:
1 – How high jewellery is becoming more sustainable and ethical, South China Morning Post (2023)

Personalisation & customisation

What are we seeing?

Personalisation

Personalising shopping experiences through the use of data to tailor specific service or product for individual customers.

- Consumers want to feel special and expect personalised touchpoints throughout their interactions with the brands.

- With a holistic knowledge of customer purchasing behaviour and habits, the end-to-end shopper experience could become much more targeted. For instance, retailers could choose to only show specific recommendations suited to the customer profile.

- Personalisation also helps consumers to avoid having too many alternatives and make better purchasing decisions.

Customisation

Creating unique products through modification of products or services to meet their preferences and desires.

- Enables consumers to reflect their unique priorities and interests onto their products.

- Catering to a larger customer base with different wants and needs and creating a product that could be consumed by many different customer segments.

- Ability to customise products to meet their needs and preferences also heightens customer satisfaction which could increase feelings of brand loyalty.

How are retailers adapting?

With the ever-growing digital transformation and direct-to-consumer shake-up, there is an increased emphasis on retail branding and marketing efforts to establish targeted interactions with existing and new customer segments. Consumers will resonate with brands that can capture their attention effectively, as they receive targeted and timely product information tailored to their current personalised needs.

SEPHORA

Sephora **gamifies** the shopping experience through quizzes[1] – where consumers can answer a set of questions and **receive personalised recommendations** on suitable products.

UNIQLO

Uniqlo provides a range of **customisation services** such as embroidery, t-shirt printing and clothing alteration. Consumers are able to create their own unique clothing that reflects their personal style.

Note:
1 – Sephora SEA Used In-App Message Gamification to Increase Purchases by 132%, Braze (2022)

Lifestyle changes

What are we seeing?

Informed Consumer

Consumers are leveraging multiple data points to understand their products, seek reviews and make well-informed decisions.

- Consumers have more platforms to access information or reviews of products and services. For instance, they could refer to product sites, social media accounts and forums to better understand the products.

- This also means that there will be greater transparency and consumers are now empowered to call out brands that are falling short of their standards.

Need for Convenience

Home has continued to be the focus for living, working and shopping. This drives the surge in omni-channel retail adoption, even among infrequent users.

- The COVID-19 pandemic accelerated the movement towards remote working and consumers are spending more time than ever at home.

- This indicates a shift in purchasing behaviours. Instead of visiting stores, consumers want to shop from the comfort of their own homes, while still being able to immerse in the full shopping experience.

How are retailers adapting?

Retailers will have to improve their interactions with customers and elevate the overall customer experience. This means being able to communicate what their brands stand for and quickly address any customers' criticism to prevent backlash from the public. Investing in digital commerce service and integrating the online-to-offline elements into a seamless, user-friendly experience for consumers will also be critical to keep customers satisfied.

BOUCHERON
PARIS DEPUIS 1858

Allowed consumers to virtually try on its luxury jewellery via smartphones, resulting in a **50 per cent increase in website traffic[1]**.

De Beers' "My Forevermark Fitting" microsite allows consumers to try on pendants and earrings virtually from the comfort of their homes via webcams

Note:
1 – Augmenting Luxury Realities, Luxury Society (2011)

3.2   Key Trends in the Retail Sector

Ways for Retailers to Navigate Changing Consumer Trends		
Rise in sustainability awareness	**Personalisation & customisation**	**Lifestyle changes**

Business Implications

Incorporating sustainability into operations and brand purpose • Retailers have to rethink ways to incorporate sustainability into their business operations and get consumers involved in initiatives. • Brands have to be clearer and more intentional with the values they stand for. **Sustainability needs to be a top item on the executive agenda** • This means investing time in building the necessary know-how and putting appropriate capital expenditure behind sustainability goals to turn rhetoric into action.	**Using data to drive personalised services** • Retailers need to leverage consumer data to make smarter recommendations and support consumers in making the right product purchase. **Provide options for consumers to customise their products and services** • Retailers can consider different ways to introduce customisation into the consumer's shopping journey, starting from how they would like to be engaged to receiving a uniquely tailored product.	**Adapting sales channels to meet consumer's lifestyle changes** • Retailers have to enable a more convenient format of shopping such as e-commerce or omni-channel platforms. • Retailers also have to integrate online and offline channels to maximise the consumer base.

Use Cases

Sustainability as a guiding principle By Invite Only has eliminated plastic packaging, engaged with ethical factories and neutralised all shipping emissions.	**Providing personalised experience** Dairy Farm International's Yuu app[1] provides a personalised loyalty reward program by leveraging customer insights.	**Online-to-Offline Commerce** Amore Store x Lazada[2] at Funan blends online and offline shopping elements into one. Customers can browse the full catalog of products online and try on the actual products in stores, assisted by beauty advisors.

Note:
1 – DFI Retail's Ronald Wong on how the Yuu loyalty app's marketing cut through the noise, Campaign Asia (2022)
2 – AMORE Store x Lazada launches in Funan, Retail in Asia (2019)

2   New Retail Model

Retailers are transitioning towards a 'phygital' approach with hybrid purchasing options, as they seek to create unique shopping experiences with the integration of online and offline elements. The proliferation of technology and insights gives rise to different operating models that result in the unique retail journey for the consumers.

1. Hybrid retail

Developing seamless multi-channel experiences	**Integrating online and physical stores**
Shopping experiences will have to encompass multiple channels to enable consumers to shop seamlessly and for retailers to enter global markets and engage international customers.	Click-and-reserve and click-and-collect services to be made available to consumers.

2. Customer-centric retail experience

Integrating customer centricity across the end-end retail value chain, platforms and touchpoints	**Developing and integrating digital wallets**
Implementing business models that capture customers' attention and involve them in curating their own shopping experiences.	Over 600,000 retailers and merchants across Southeast Asia have integrated GrabPay as a payment method[1].

3. Rise of innovative business models

New operational demands in retail	**Real-time inventory management**
Retailers need to transform big data into business insights and plan effective actions to deliver a fully integrated, connected and consistent customer experience.	Need for recording sales and purchases of inventory immediately so businesses can meet consumer needs.

Note:
1 – GrabPay: Enabling smoother, safer payments in Southeast Asia, Adyen (2019)

3.2   Key Trends in the Retail Sector

There is a rise of different operating models across different retailers, brought about by the proliferation of technology and insights:

1. Hybrid retail

OMNI-CHANNEL RETAILING	E-COMMERCE MARKETPLACE

2. Customer-centric retail experience

CO-CREATION MODEL	SMART STORES

3. Rise of innovative business models

CURATED SUBSCRIPTION MODEL	NEXT GENERATION SHARING MODEL

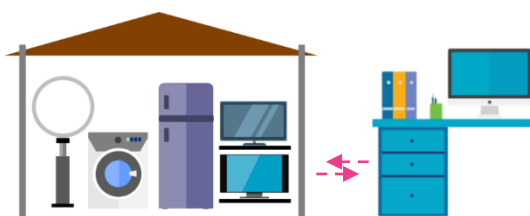Mercer

Omni-channel retailing

How does it work?

- Omni-channel retailing delivers the retail shopping experience through both physical (showrooming) and online channels (web-rooming).

- Customers may discover products from online channels and visit physical stores serve to browse and interact with items on display.

- Customers also have the option to conduct their research on the product online and can either make direct purchases online or make trips to the physical outlets to test out products before purchasing.

- Omni-channel retailing offers the convenience of being available at any point in time to retail customers. It is about delivering a highly interactive, personalised brand experience where the customers are reached through all possible touch points and channels.

Example

DECATHLON

- Decathlon is a brand that is leading the way with its omni-channel capabilities[1]. The store provides customers with the option to self-check out with in-aisle kiosks. In addition to that, Decathlon has made a big move in setting up a special showroom.

- In the past, the brand allowed consumers to search for and try the products. Nowadays, customers can use onsite computers to click and collect or choose home delivery. In this way, Decathlon can create a more convenient shopping experience, while every customer purchase can be kept as a digital profile.

Relevant sub-sectors

Current Model

Future Model

Consumer Electronics

Department Stores

Fashion & Sporting Goods

Furniture & Household

Jewellery & Timepieces

Supermarkets & Convenience Stores

> There is a trend for pure e-commerce firms to move into omni-channel retailing. This is particularly for sub-sectors where customers still prefer to experience the products itself (i.e. fashion, furniture etc.).

Note:
1 – Omnichannel: It's time for the online tail to wag the retail dog, McKinsey (2021)

| 3.2 | Key Trends in the Retail Sector |

E-commerce marketplace

How does it work?
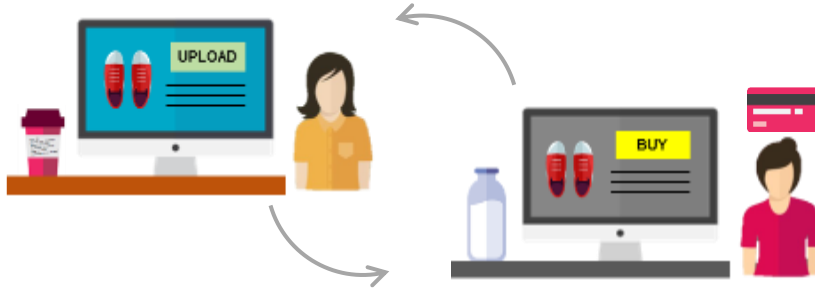
- Business owners operate a digitally-enabled marketplace via an online platform.

- The marketplace operator facilitates transactions between brand owners and consumers, by aggregating product or service information from multiple brand owners and processing consumer transactions through the platform.

- The marketplace operator may perform order fulfilment, but does not typically possess ownership of inventory.

> **In this model, the market is likely to be comprised of a few large marketplaces with multiple smaller brands listed on their platforms. There is also a trend for these players to move into omni-channel retailing upon achievement of a reasonable scale.**

Example

- The Singapore E-commerce platform Shopee ranks #1 with a significant share of the market followed by Lazada in second place, and then Amazon, a close third.

- Efficient payment systems, some with easy interest-free instalments, Artificial Intelligence, prompt deliveries and companies' corporate ethos supporting sustainability and the circular economy all led to the deeper adoption of e-commerce.
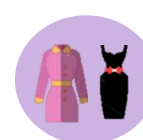
Relevant sub-sectors

Consumer Electronics

Department Stores

Fashion & Sporting Goods

Furniture & Household

Jewellery & Timepieces

Supermarkets & Convenience Stores

Current Model

Future Model

Co-creation model

How does it work?

- Customers are involved in the creation process of products, providing flexibility in selection and customisation.

- This model may leverage mass customisation, typically by offering a variety of modules to be added to a core component of the product. Customers select modules and respective variations (e.g. colour) that collectively form the end product.

- 3D printing technologies may also be adopted for this model, in which 3D models can be printed on-demand as a visual mock-up or prototype, or as the end product itself.

Example

- Uniqlo's strategy is centered around creating a unique and differentiated customer experience by enabling customers to tailor and customise their own products.

- The fashion retailer provides in-store services such as embroidery, clothing alterations, design printing services in many of its flagship stores.

- In 2020, Uniqlo brought back its popular UTme! Customisation program where they encourage consumers to design their own t-shirt.

Relevant sub sectors

Consumer Electronics

Furniture & Household

Jewellery & Timepieces

Fashion & Sporting Goods

Current Model

Future Model

| 3.2 | Key Trends in the Retail Sector |

Smart stores

How does it work?

- Smart stores leverage technology and the Internet-of-Things to give customers a "SMART" shopping experience.

- In this model, traditional service offerings will be replaced by technology or robots (i.e. cashiers, physical payments, product interaction) to give customers a more efficient and seamless shopping experience.

- Human interaction may still exist but are focused on providing value-added services like advisory services. Humans working in a smart store context would see a huge reduction in transactions and manual activities as compared to the traditional outfits.

| Example | Relevant sub sectors |

SEPHORA

- Sephora has introduced digital mirrors[1] into some of their Spanish stores. There are giant digital screens equipped with cameras that show the customers in live time on the screen. Overlaid are the product items that they want to see and how they look.

- Fashion retailers are starting to incorporate vending machine business models as a platform to sell their product. These vending machines have interactive screens fitted to the front. Customers are able to purchase the products that they want with more efficiency at more locations.

Consumer Electronics

Department Stores

Fashion & Sporting Goods

Current Model

Future Model

Furniture & Household

Supermarkets & Convenience Stores

Note:
1 – Sephora introduces AI-powered digital mirror to Spanish flagship, Cosmetics Business (2019)

Curated subscription model

How does it work?

- Customers pay a regular subscription fee to receive a curated set of products; which are automatically ordered and delivered based on a predefined schedule.

- These products are often curated by experts – specifically tailored based on individual preferences and buying trends or based on certain themes/ trends. This may include advisory services where applicable.

- A customer profile may be set up to guide the experts on their curation of products for each individual.

- This is a move from the traditional "selling relationship" to a "service relationship" with the customer.

Example	Relevant sub-sectors

- Bespoke Post is an online subscription model where subscribers choose a themed box filled with hand-curated pieces. This model allows for customers to be able to try something new at a relatively low price. The customers will also be able to skip or swap out any box without charge.

- Themes of boxes include: Camping; Mixology; Cooking & Grilling; Clothing; Self-grooming and many more
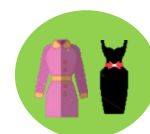
Current Model

Future Model

Fashion & Sporting Goods

Supermarkets & Convenience Stores

Next-generation sharing model

How does it work?

- This model focuses on the rental market. Retailers offer product rental services for a fraction of the retail price in lieu of ownership of merchandise.

- The business owner will rent out items for a certain duration and charge a certain percentage of the retail price as the fee. Usually, an extra amount is charged as insurance during the rental period to cover any sort of accidental damage. Rental fees typically covers the service charges (i.e. dry cleaning) and other minor expenditures.

- When the order is placed, the product will be dispatched from company's inventory with a pre-paid, pre-addressed package to return the item.

- This rental model is more suited for items where the need is temporary and created by an occasion or a high value items that are statement pieces. It is not as applicable for items that are a daily staple or are meant for long term use.

Example

- Stitch Fix is an American online personal styling service that helps user try on specially-selected clothes at home.

- Users will fill up a questionnaire to indicate their styling preference and a stylist will pick out clothes to be shipped to them. Users then try them on and decide which to keep and which to send back. Users only pay for clothes that they decide to keep without any shipping, return or exchange charges.
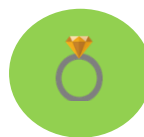
Relevant sub-sectors

Consumer Electronics

Fashion & Sporting Goods

Furniture & Household

Jewellery & Timepieces

Current Model

Future Model

Ways for Retailers to Adapt to Changing Retail Models

Hybrid retail	Customer-centric retail experience	Rise of innovative business model

Business Implications

Hybrid retail	Customer-centric retail experience	Rise of innovative business model
Creating seamless experiences across sales channels. • The pandemic has made online shopping more accessible and common. Retailers need to ensure the customer experience remains seamless and consistent throughout the customer lifecycle, regardless of channel or device. **"Standing out" in a competitive online marketplaces context.** • Marketplace operators may need to innovate to find ways to differentiate themselves and compete with other platforms in driving consumer traffic.	**Developing innovative ways to create new product and service experiences.** • Implementing "Smart" stores with digital touchpoints and immersive experiences will optimise manual operations and free up capacity for employees to provide more interactive and engaging customer experiences. **Empowering customers to curate their products and services.** • Innovating new services and introducing elements where customers can be creative and get involved in customising their own products to meet specific preferences and desires.	**Adjusting business models to meet consumer's needs.** • Consumers are met with many choices and experience decision-fatigue. Some retailers are addressing consumer needs by creating subscription packages that provide consumers with products or services catered to their needs. • Subscription models are also a good way to enhance customer loyalty and long-term commitment.

Use Cases

Hybrid retail	Customer-centric retail experience	Rise of innovative business model
Decathlon; Lazada; NTUC Adopting an online-to-offline model such as self-pickup capabilities and in-store digital touchpoints.	**Starbucks; Sephora** Allowing customers to pick specific designs or requirements to modify their products to their needs.	**Bespoke Post; Stitch Fix** Rethinking ways to reach out to customers through subscription or rental programs to provide curated products and services for customers.

3

Key technological implementations in the retail sector (e.g. self-service checkouts) as well as supply chain (e.g. forecasting & replenishing) have enhanced how retailers are implementing their daily fulfilment activities. The introduction of advanced technology such as AI or AR/VR experiences also promotes new and innovative experiences for retailers.

1. Automation integration

Automated solutions improve efficiency and customer experiences

Automated services such as self-checkouts are becoming a common occurrence, as customers form their shopping habits around efficient retail services[1].

Normalising technology implementation

NTUC FairPrice, Cold Storage, Giant and Sheng Siong now have a range of hybrid and full self-checkout facilities[2].

2. Retail analytics

Leveraging on big data in retail

Retailers are actively gathering data to determine deeper consumer insights and spending patterns that can drive business solutions.

Using Qualitative & Quantitative Data[3]

IKEA uses both qualitative and quantitative data to understand how different consumer segments perceive the store experience and brand communications differently.

3. Web 3.0 in retail

Integrating Web 3.0 technology into the retail space

Retailers can explore variations of metaverse to augment their sales platforms and channels.

Incorporating simulations

Commune's flagship retail experience center[4] has taken this a 3D floor planner and the use of virtual reality (VR) simulation.

Note:
1 - How Self-Service Checkouts Can Improve The In-Location Experience, Forbes (2021)
2 – Could self-checkout counters solve supermarkets' manpower woes, Singapore Business Review (2016)
3 – How IKEA Onboards Data And AI To Leap Forward, CXM Today (2022)
4 – Commune uses VR tools to enhance furniture shopping experience, The Peak Magazine (2020)

Automation integration

How will automation affect retail businesses?

- Retail automation provides businesses with technology that **streamline manual repetitive processes** that are time-consuming or require extensive manpower to perform.

- Automation is not designed to replace the need for manpower, but **enable employees to be more focused on higher-value activities** such as customer engagement.

- Types of retail automation include workflow automation, analytics automation, order fulfilment automation, inventory management automation and robotic automation.

Automation integration in the retail sector

RFID TAGGING

Use of RFID tags simplifies the inventory management process
Inventory and goods are tagged with RFID labels. As goods move through the warehouse and distribution center, RFID read points track the goods movement. A handheld RFID reader allows for staff to conduct stock counts easier.

Self-checkout kiosk

Use of self-checkout kiosks to reduce the cashiering duties of sales associates.
Introduction of self-checkout kiosks allows for customers to make payments on their own without the need of a cashier. Cashiers just have to assist the customers to operate the kiosk if needed.

Unmanned stores

Use of various technologies to enable a retail store to run without staff.
Customers can buy their items off oversized vending machines.
Retailers can use Scan & Go applications on mobile devices for payment purposes.
Use of cameras and personal identification to prevent item-loss.

Automation integration

There are many more areas across the retail industry that have the potential to implement automation integration.

#	TECHNOLOGY	SUB-SECTOR					
		Department Stores	Supermarkets & Convenience Stores	Fashion & Sporting Goods	Consumer Electronics	Jewellery & Timepieces	Furniture & Household
1	Queue Management Systems	Potential	Implemented	Potential	—	—	—
2	Product location mapping	Potential	Implemented	—	—	Potential	Implemented
3	Electronic shelf labelling	Potential	Implemented	Potential	Implemented	—	Implemented
4	Smart shelves	—	Implemented	—	—	—	—
5	Register robots	—	Potential	Potential	—	—	—
6	Retail kiosk	Implemented	Potential	Implemented	Implemented	Potential	Potential
7	Visual Search	Potential	—	Implemented	Potential	Potential	Potential
8	RFID tagging	Implemented	—	Implemented	Implemented	Implemented	Implemented
9	VR business solutions	Potential	—	Potential	Potential	—	—
10	Augmented Reality	Potential	—	Implemented	—	Potential	Implemented
11	Vending machines	Potential	Implemented	Potential	Potential	—	—
12	Bluetooth beacons	Potential	Potential	Implemented	Implemented	—	Implemented
13	Chatbots	Potential	—	Potential	Implemented	—	Potential
14	3D printing	—	—	Implemented	Potential	Implemented	—
15	Collaborative robots	—	—	—	—	—	Potential
16	Real-time optimisation delivery	Implemented	Potential	Potential	Potential	—	Implemented
17	Commercial Drones	Potential	—	Potential	Potential	—	—
18	Omni-channel fulfilment	Implemented	Implemented	Implemented	Implemented	Implemented	Implemented
19	Alternative digital payment methods	Implemented	Implemented	Implemented	Implemented	Implemented	Implemented

■ Implemented   ■ Potential implementation

Retail analytics

What is retail analytics:

- Retail analytics provide **analytical insights on data gathered in various retail functions** such as sales, inventory and customers, to identify emerging consumer patterns and key performing indicators.

- Through the insights gathered, retailers can **understand customers better, optimise business processes and operations, and deliver relevant customer services.**

TYPES OF RETAIL ANALYTICS

PRESCRIPTIVE

- Provide retailers with recommendations on the next business steps
- Use of simulations or algorithmic AI to identify the best option that leads to optimum business growth.
- Use machine learning programs to identify patterns and clusters of actions that lead to the best outcomes.

PREDICTIVE

- Enable retailers to forecast future trends.
- Utilise information from both descriptive and diagnostic analytics to detect clusters and exceptions to use complex algorithms to predict future trends, such as sales & demand forecasting

DIAGNOSTIC

- Use data to answer the root cause of specific business problems.
- Use of statistical analysis, algorithms and machine learning to understand data and find correlations.
- Use to find anomalies and identify potential problems.

DESCRIPTIVE

- Help retailers organise data that presents a story.
- Consolidate data from multiple sources (POS terminals, inventory systems, OMS, ERPs) to generate valuable insights.

3.2   **Key Trends in the Retail Sector**

Retail analytics

Retail store & operations

Forecasting store capacity and manpower planning
Using data analytics, retailers can use past data to forecast the volume of customers in the store and plan the manpower accordingly

Determining pricing through AI algorithms
Retails can use dynamic pricing to searching the web for the average price of an item and change the price on the e-commerce platform to match.

Marketing

Leveraging data to gain insight on customers' purchasing habits and behaviors
Retailers can use data to generate personalised advertisements and promotions for customers. The retailers can also provide predictive recommendations to customers.

E-commerce

Tracking and managing customer engagements
Retailers can track the total number of visitors to their e-commerce platform and track each of their journey across the e-commerce experience. Retailers will be able to identify pain points faced by the customers and develop solutions for them. There are many complex variations and ways to gather and analyse these forms of data.

Merchandising

Identifying product opportunities and gaps
Retailers can use merchandising analytics to derive insights using data like social sentiments and market trends with internal data for merchandising planning, sourcing, space planning and inventory replenishments and markdowns.

RETAIL ANALYTICS ACROSS THE VALUE CHAIN

Mercer

| 3.2	Key Trends in the Retail Sector

Web 3.0 in retail

What does Web 3.0 mean for retailers?

- Web 3.0 aims to revolutionise online interactions with IT decentralisation and privatisation of the internet. Through emerging technology such as block chain and token-based economies, there are **fewer intermediaries between businesses and customers.**

- As a result of Web 3.0, retailers will enjoy **enhanced security** and **improved traceability** of supply chain which can help to streamline online operations, reduce cost and improve efficiency, generating **greater transparency and trust** between retailers and consumers as a result.

Examples of Web 3.0

Blockchain
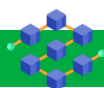
- With the help of blockchain technology, organisations can go for a complete decentralised network with peer-to-peer networks carrying out transactions and validating them.
- Every transaction is recorded according to the consensus method, after which the transaction is encrypted and linked to the previous transaction using the hashing method so that it is secure.

Augmented life

- Augmented reality (AR) can be incorporated to storefronts to elevate customer experiences.
- The use of virtual fitting rooms and digital assistants are alternatives for customers when store assistants are busy.
- Furniture retailers have also experimented with virtual furniture placement applications.

Metaverse

- Metaverse is a digital universe whereby users use VR technology to access and interact with the elements in it.
- The Metaverse can be used to create immersive retail experiences, to the extent where users can view and purchase items in the Metaverse with digital currency.

47

Web 3.0 in retail

Web 3.0 could be incorporated across both the front-end and back-end functions to support a variety of activities.

Marketing	Product	Talent
• Product placement • Immersive marketing • Product demos • Simulated ethnographic research • NFT-based loyalty programs	• Product testing and try-on • Branded digital product • Digital and physical integration • NFT partnerships and licensing	• Employee Collaboration • Immersive Events • Training and hands-on simulation

Supply chain	Retail operations
• Manufacturing design, safety and testing • Contact center interactions • Process simulation and refinement • Last-mile delivery and blockchain verification	• Enhanced e-commerce shopping • Augmented store experience • Planogram and store layout visualisation • Metaverse demo/digital stores

Example: Majid Al-Futtaim's Store of the Future

- In collaboration with Cisco, Majid Al-Futtaim[1] launched a store that integrated e-commerce technology features into their physical retail space, providing a seamless shopping experience for consumers walking into the store.

- **As a product is picked off the shelf, sensors identify the product and load product pictures into the screen.** The mirrors around the store **allow users to scan the barcode to reveal the product's price, size and colours**.

- If the user decides to purchase the product, a **QR code can be scanned to add the product to a virtual shopping cart, allowing the customer to checkout digitally.**

- The store uses **wireless infrastructure location service analytics and cloud based ceiling cameras** to provide consumer behavior insights and analytics, monitoring factors such as store footfall and demographics that drive targeted marketing content displayed on screens as customers enter the store.

Note:
1 – Store of the Future launched as Mall of the Emirates pushes retail technology, Arabian Business (2022)

Ways for Retailers to Leverage Automation and Data

Automation integration	Retail analytics	Web 3.0 in retail

Business Implications

Integrating technology to increase automation in retail.

- Retailers are seeking to combine process optimisations with real-time information or automation to perform technology-enhanced store tasks.
- Retailers should embrace a culture of innovation and adopt an open stance towards technology in retaining customer loyalty and maintaining a competitive edge.

Harnessing data insights to drive decision-making.

- As retailers branch out to various offline and online sales channel, they are tapping on technology such as marketing analytics software to derive insights on their customers base.
- Many are also utilising inventory analytics to track and forecast the movement of inventory.

Adapting to how Web 3.0 technologies will disrupt business operations.

- Increase acceptance for cryptocurrencies as payment for goods and services.
- NFTs open a new avenue for brands to interact with their loyal consumer base.
- Metaverse aims to connect the physical shopping experience with virtual technologies. Use of AR and VR to augment the in-store space.
- Use of decentralised apps for secure peer-to-peer transactions.

Use Cases

Self-checkout kiosks help to augment the tasks of sales associates and cashiers.
Watsons, one of the largest department stores in Singapore, have introduced self check-out kiosks to provide tech-savvy customers a more convenient and faster checkout option. This allow cashiers to focus on supporting other customers who prefer traditional checkout methods.

Loyalty programmes help in addressing pain points of the customer journey.
Brands are not only providing retention based reward programmes, but also providing customers hassle-free return services to encourage repeated purchasing behaviours. Memberships can also form communities among like-minded individuals, while helping to reinforce a positive brand image.

Nikeland is Nike's Metaverse platform in Roblox.

The store at NYC House of Innovation provides an AR version of Nikeland that has been launched on the Roblox platform, for consumers of all ages to interact with the brand.

4   Future-proofed Supply Chain and Distribution

As demand for products become less predictable, retailers are providing agile distribution networks that can fulfil direct consumer delivery, maintaining cost effectiveness while fulfilling small order sizes and diverse product range.

1. Optimising Forecasting and inventory

Forecasting and replenishing systems

Using forecasting and replenishing systems to anticipate and order products based on forecasted consumer demand.

Zara provides **real-time stock replenishment** across physical stores, transferring stock between stores during periods of high demand.

2. Agile distribution networks

Targeted product distribution

Retailers are complementing their traditional fulfilment strategies with different logistics service options such as third-party logistics service providers or setting up in-store fulfilment options. The objective is to ensure that customers are able to get their products delivered in good condition, within a short period of time.

Outsourcing targeted distribution networks

Retailers have engaged with last-mile delivery providers (e.g. Ninja Van) to fulfill direct-to-consumer deliveries.
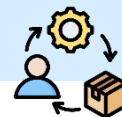
3. Resilient Supply Chain Networks

Diversified supply chain networks

COVID-19 revealed the fragility of supply chains and retailers are starting to rethink how could they develop a more resilient supply chain through diversifying and sourcing for suppliers or manufacturers across the globe.

Retailers are developing **new, innovative distribution channels** that cater to customers' demands while maintaining operational effectiveness.
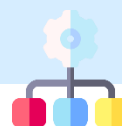
Optimising forecasting & inventory

How are retailers optimising their inventory:

To identify and predict future demand for inventory, retailers have to **collate inventory data** through **inventory management software,** and analyse the data together with factors such as **time and potential events that drive demand**. Analytics such as correlation and regression between inventory data can assist retailers forecast and predict demand, to make better planning decisions during specific periods.

Demand forecasting:

Retailers aim to **predict the future demand for a product, service or activity**, to support the business in determining the right quantity of purchase and production to meet customer demands.

Inventory optimisation:

Retailers ensure **inventory levels are optimised and maintained based on forecasted demand**, to minimise the risk of understock, overstock, and deadstock.

Pillars of inventory optimisation

Stock replenishment **+** **Demand forecasting** **+** **Inventory strategy**

Determining the baseline stock replenishment rate, and identify potential events that drive large increase in demand for inventory.

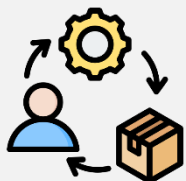Developing a robust data analytics methodology that provides accurate predictive capabilities.

Maintaining strong strategic partnerships with suppliers to ensure reliability in supply chain network.

Reviewing inventory operating processes to ensure consumers receive products promptly.

Agile distribution networks

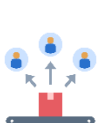### Retailers are developing agile and de-centralised distribution networks

- To meet consumer demand for faster delivery, retailers are considering different options to create agile, de-centralised distribution networks. Distribution networks are an **interconnected group of storage facilities and transportation systems** that receive inventories, and deliver to customers.

- Agile distribution networks **focus on flexibility and receptiveness**, managing how the supply chain entity operates on a daily basis.

- Retailers could **leverage various types of distribution channels (centralised or de-centralised)** to respond to changes in consumer demand and preferences.

- Retailers typically balance real-time data, short-term forecasted projections and types of products in determining the types of distribution channels used.

Types of distribution channels

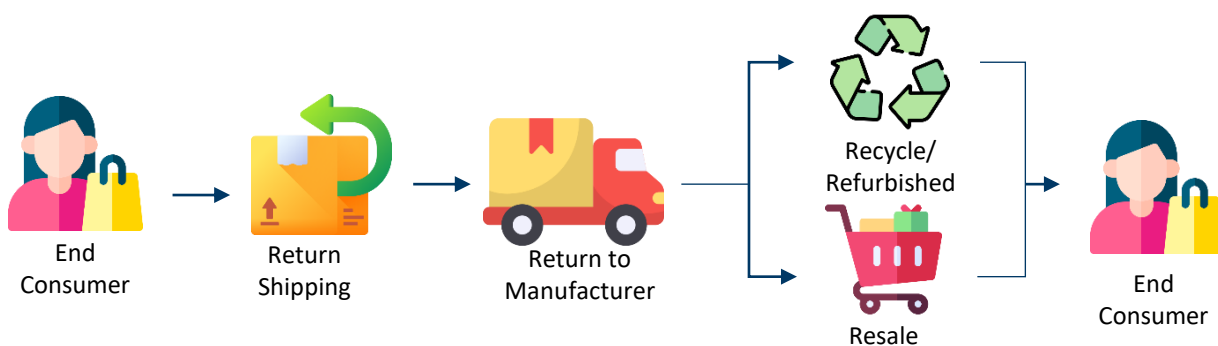|	BENEFITS	LIMITATIONS
De-centralised Distribution: Products move through 'nodes' that are tuned to serve the customers, based on the order volume within each region	• Flexible and efficient order fulfilment • May leverage on existing or 'dark' stores to store and fulfil orders • Work with third-party logistics partners to fulfil delivery needs	• Operations highly dependent on partnerships between various logistics partners
Centralised Distribution: Products distributed from central locations to customers across regions	• Highly standardised systems and processes • Focuses on reliability and predictability	• Delivery efficiency restricted by location and distance • High reliant on large inventory volume • Suitable for products with low market variability

Agile distribution networks: Reverse logistics

What is Reverse Logistics?

- Returns are often inevitable in retail, especially in e-commerce order fulfilment. Retailers have to **manage both delivering the product to the customer as well as manage any possible returns**. Reverse logistics is the process of moving the product from the customer to the retailer as they return the products[1].

- **Quality control of item returns** remains a critical issue as retailers have to determine if the item is still in pristine condition to be resold to another customer.

- The process of the retailer receiving the return items is both expensive and time consuming. Hence retailers are placing greater emphasis on **'return-to-store' services.** Customers are able to **easily return their items and process the refund process quickly, while retailers can manage product quality** and continue to engage with the consumers through the stores.

Examples of reverse logistic processes

| End Consumer | → | Return Shipping | → | Return to Manufacturer | → | Recycle/ Refurbished / Resale | → | End Consumer |

RETURN POSTING BY MAIL	**RETURN TO THE STORE**	**PARCEL PICKUP STATIONS**
Retailers can provide a return label for the customer to mail the item back. Customers will have to go to the nearest post office to return the items.	Allow customers to be able to bring items purchased online to the physical store to return or exchange the item.	Have a designated pick-up points for customers to drop their items off without the need to mail the item back.

Note:
1 – A Guide to Reverse Logistics: How It Works, Types and Strategies, NetSuite (2021)
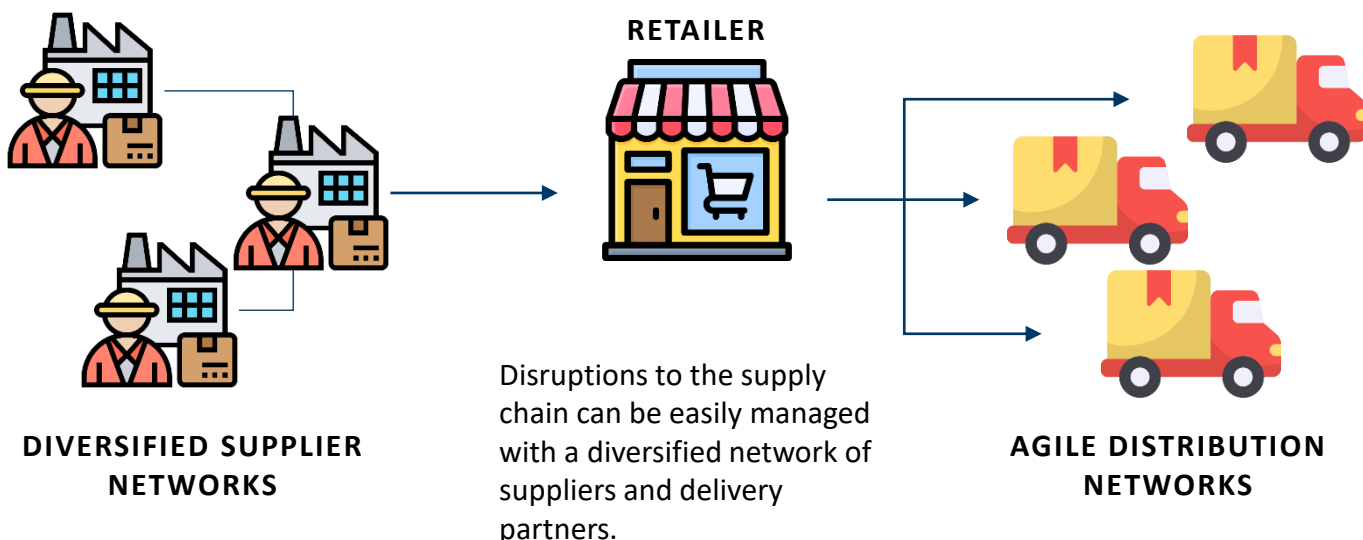
Resilient supply chain networks

Diversifying Supply Chain partners to foster resilience in the face of uncertainty.

- With the uncertainty in the global supply chain landscape, **retailers are actively diversifying their supply chain activities and sources of raw materials**, to prevent an over-reliance on singular manufacturing and logistics value chain.

- Diversification of these processes and resources would **mitigate significant costs and supply issues if the value chain is disrupted**.

- Resilience by diversification can be achieved by **classifying suppliers by risk tiers and looking to partner with suppliers with the adequate risk to cost effectiveness ratio**. This ensures flexibility in supply chain process whereby any disruption from one supplier would strain the supply chain but not completely stop it.

What would a resilient supply chain look like?

RETAILER

DIVERSIFIED SUPPLIER NETWORKS

Disruptions to the supply chain can be easily managed with a diversified network of suppliers and delivery partners.

AGILE DISTRIBUTION NETWORKS

Ways for Retailers to Future-proof Supply Chains and Distribution

Optimising forecasting And inventory

Agile distribution networks

Resilient supply chain

Business Implications

Retailers need to leverage data and technology to maximise the efficiency of their logistics and supply chain to adapt with the changing global conditions.
- Leverage inventory forecasting technology to be able to effectively predict demand metrics to be able to accurately manage inventory supply.
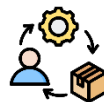
Retailers should consider decentralising delivery hubs and using third party logistics providers.
- Having regional nodes that can process order fulfilment will increase the efficiency in which products get to customers.

Retailers need to explore other forms of delivery capabilities.
- Use of alternative methods to perform last mile delivery such as parcel pickup kiosks.
- Incorporating reverse logistics processes for product returns.
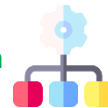
Retailers need to diversify their supplier base to be able to adapt to any change in global supply chain conditions.
- Look into diversifying suppliers and manufacturers from varying countries and not rely on one source.
- Diversification lead to cost competitiveness and innovation that can improve the Supply Chain & Logistics industry.

Use Cases

Businesses are utilising real-time data to make their business decisions.
RFID trackers and sensors provide real-time inventory data across the supply chain. Businesses conduct data analytics on inventory data collected to drive optimal inventory forecasting.

Zara uses their existing stores as a delivery hub and order fulfilment partner[1].
Orders placed online will be sent to the store, where the sales associate prepares the order for delivery. A delivery partner picks up the product at the store instead of a centralised warehouse to achieve faster delivery fulfilment.

Consumer electronic retailers faced a global chip shortage as manufacturers relied heavily on suppliers present in specific geographic regions, driving customer wait times for digital products.
The United States has implemented a 'Chips Act' to subsidise research and production of semiconductor production in the US to diversify the source of semiconductors.

Note:
1 – Zara Owner's Lesson for Others Is Keep Supplies Close to Home, Bloomberg (2021)

4

THE RETAIL LANDSCAPE: TOMORROW

4 **The Retail Landscape Tomorrow**

Potential Future Scenarios of the Retail Sector

This section introduces 5 potential future scenarios of the retail sector. In each scenario, we outlined what are some of our big bets and provided examples of how key trends in the sector may come to life. The potential impact on the retail ecosystem, retailers, consumers and other stakeholders are also illustrated in each scenario.

The aim of this section is to highlight the transformation of the retail sector, in hopes to inspire and prepare retailers for the future. For each scenario, we identified some opportunities areas for retailers to consider as they embark on their transformation journey.
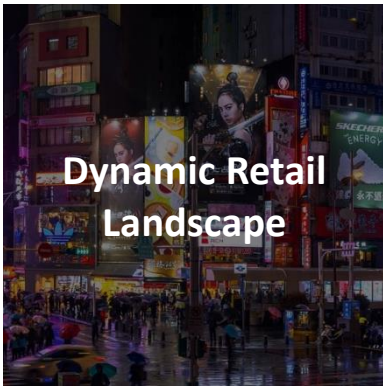
Dynamic Retail Landscape
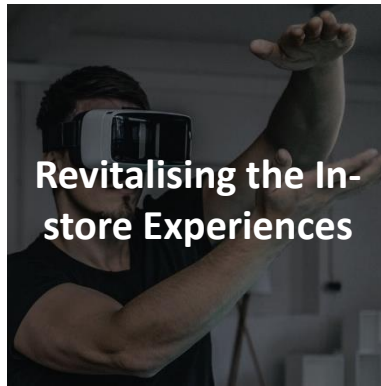
Revitalising the In-store Experiences

Rise of Circular Economy

Growth in Alternative Revenue Streams

People-Powered Retail

57

Mercer

4.1   The Dynamic Retail Landscape
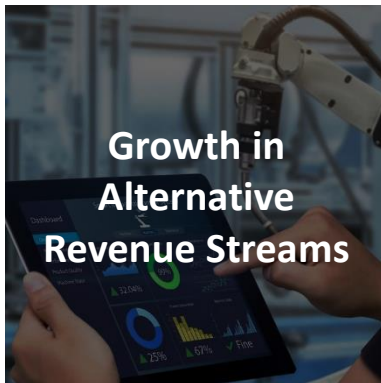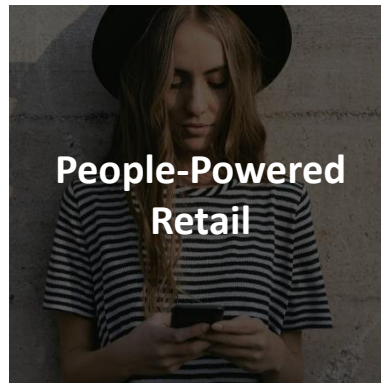
Key Trends Driving this scenario

Rise of New Retail Model

Smart Stores, E-commerce, Branding, Internationalisation & Ecosystem Collaboration

Automation & Data

Big Data & Data Aggregation, Automation & Optimisation

Future-proofed Supply Chain

Agile Distribution Network, Resilient Supply Chain

What can we expect?

1

Increase in partnerships with non-retail players

In the future, new types of partnerships will emerge in the sector. Partners such as technology enablers, data aggregators and logistics solutions providers will play an integral role in supporting retailers. These partners enable retailers to acquire the necessary capabilities, presenting a viable alternative to building these capabilities internally, to enhance customers' experiences and optimise costs. Being able to form the right partnerships will become a key competitive advantage.

2

Home-grown brands going global with e-commerce

Powered by e-commerce, local retailers will now have access to international markets. To compete effectively, local retailers need to build a **strong brand identity** and **establish their presence in the global market**. At the same time, there will be greater competition from the influx of foreign brands vying for local market share. Retailers who successfully utilise social media and e-commerce to generate brand following, engage customers across the globe and prioritise customer experience will emerge as winners.

3

Growth in pure-play micro-retailers

As competition increases, micro-retailers need find ways to increase profit margins, or risk being displaced. Many micro-retailers will begin to **pivot to e-commerce and social media** to build brand identity, engage like-minded customers across the globe and build customer loyalty. For retailers who are unable to make this transition, they will lose market share and competitiveness.

4

Collaboration for innovation and experimentation

Driven by customer's demand for unique products and experiences, retailers are looking beyond their existing offerings to excite customers. Many have started to collaborate as a way to innovate and reach new customer segments. Collaboration also supports multi-channel marketing, network growth and alignment opportunities, representing a cost-effective marketing strategy. **Collaborations** will not be limited to local brands only, and many will work with international brands too.

Opportunities for Retailers

Be selective in partnership and implement targeted solutions

- Start with mapping the current and future customer's journey, and analysing gaps and opportunity areas for enhancements.

- With the end in mind, prioritise which investment would be most critical for the business and be selective in partnerships. Having clear evaluation criteria such as cost, complexity of implementation, customer and business impact could help to shortlist potential partners.

- Bearing in mind that partnerships carry risks such as relinquishing control over critical capabilities and any partnership decisions should be weighed carefully against potential rewards.

Go online to establish brand presence and sell across borders

- Develop a social media strategy focusing on the who, what, how and why of the brand. Plan and implement social media campaigns to articulate the brand's purpose and values, assess receptivity across different customer segments and track engagement metrics to optimise campaigns.

- Move stores online to reach overseas market. Explore different formats of e-commerce such as listing on third-party marketplaces, creating your own e-commerce platform or selling directly on social media. Make sure that content across these platforms are synchronised and up-to-date to deliver a holistic customer experience.

Collaborate with brands with complementary strengths

- Review existing products offerings to **identify gaps and opportunities** that could be explored and are currently overlooked.

- Look for collaborators who have the right complementary strengths and articulate the benefits of collaboration for both parties such as breaking into niche markets and experimenting with new products and services.
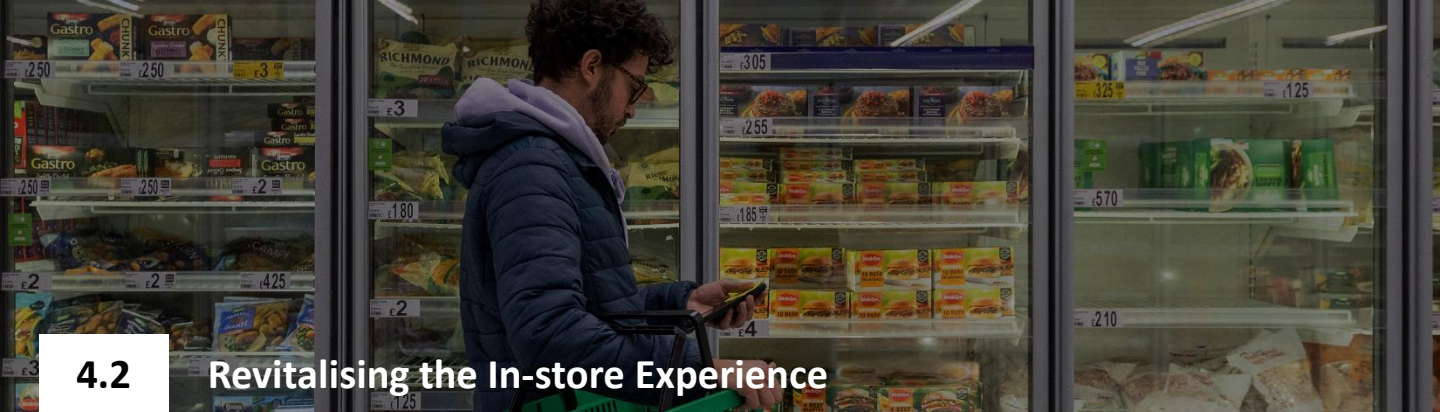
4.2   Revitalising the In-store Experience

Key Trends Driving this scenario

Consumer of the Future

Lifestyle changes, Change in Consumer Preferences

Rise of New Retail Model

Big Data & Data Aggregation, Automation & Optimisation

Automation & Data

Agile Distribution Network, Resilient Supply Chain

Future-Proofed Supply Chain

Agile Distribution Network, In-store fulfilment

What can we expect?

1

Rise of destination retail or experience centers

Stores will evolve into **exciting destinations** where customers could interact and experience the brand. In the future, stores double up as lifestyle and information hubs for retailers to showcase what their brand represents and for like-minded customers to congregate. Retailers will need to consider creating space for community activities like workshops, focusing on value-added services and bringing to life the concept of the tore.

2

Smart phygital stores

Acting as sandboxes for retailer's digital experiments, **stores will incorporate 'phygital' concepts which combine offline and online elements within a store**. Technologies ranging from interacting with virtual assistants, interactive fitting room, gamifying one's shopping experience to just-walk-out technology, retailers are able to experiment and introduce new elements to enhance customer's touchpoints.

3

Stores as key nodes in supply chain

Stores will become a key link in the supply chain. As retailers push orders through e-commerce, stores will act as a **micro-fulfilment center** and **offer 'pick-and-mix' model** where online orders can be fulfilled with stock from stores directly. Besides picking and delivering directly from stores, customers will also frequent stores to ask about their orders and facilitate returns. This means that retailers will increasingly invest in supply chain and logistics capabilities to support store fulfilment and related customer services.

4

Popularity of pop-up or concept stores

In the future, the importance of a permanent physical store will be questioned. For many retailers, complementing their e-commerce stores with a differentiated store formats such as pop-up stores could be a more cost-effective strategy. Success of **pop-up or concept store format** taps into one's 'fear-of-missing-out' mentality which could drive higher footfall and engagement. This enables retailer to have a physical presence with minimal investment while focusing on e-commerce as the main revenue stream.
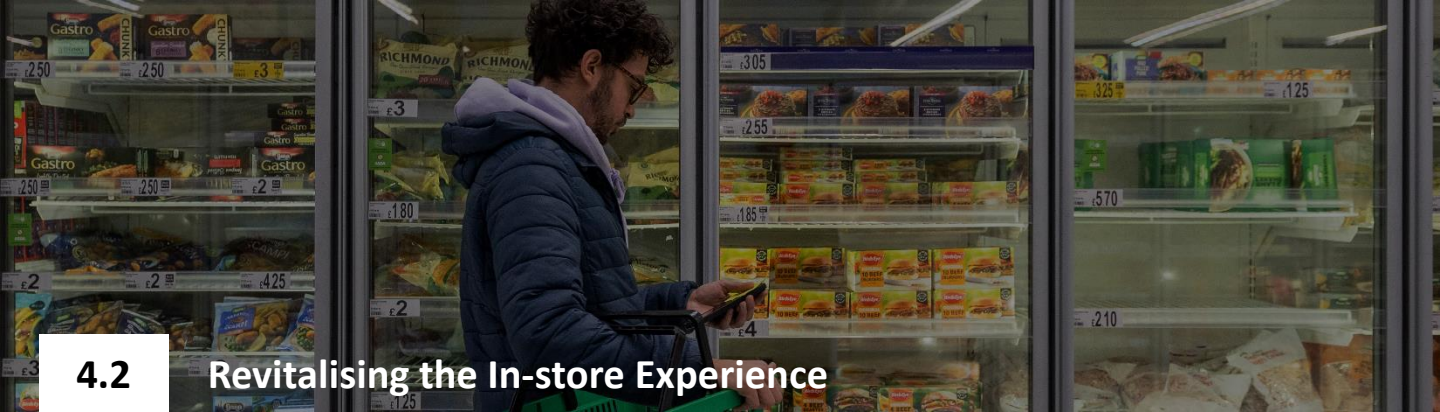
Opportunities for Retailers

Transform stores into exciting destinations for shoppers

- Map customers' omni-channel journey to identify critical touchpoints which may prompt customers to visit store. Understand the purpose and expectations behind store visits as a starting point.

- Explore partnerships to introduce exciting in-store services - amenities such as cafes, value-added services such as personal styling, tailoring, customisation may be reasons for customers to deliberately visit stores.

- As in-store experience and services change, retail roles need to be redesigned to account for growing complexity in tasks. Incumbents in retail roles need to be upskilled to support new in-store activities and services.

Invest in in-store fulfilment capabilities

- Utilise existing sales and inventory data to better forecast capacity and build order fulfilment logic to map out rules to route customer orders to optimal store nodes.

- Decide on types of in-store fulfilment strategies – ranging from picking-and-packing from shelves, redesigning back-room to accommodate inventory, to using automated solutions to support picking, whichever that best meets your needs and fulfilment aspiration.

- Cross-train employees to perform pick-and-pack inventory, assist fulfilment queries and facilitate returns of products. Employees will need to be well aware of fulfilment strategies and coordinate with logistics and e-commerce teams.

Complement e-commerce with differentiated store formats

- For pure-play retailers, set up pop-up stores as a space to meet customers and get your brands out to local shoppers. Implement unique store concepts and integrate brand elements that would create lasting impressions for customers.

- From an operational perspective, identify viable locations for pop-up stores and think about how to market pop-up stores to entice visitors. Ensure that there is sufficient stock space for products as consumers may want to purchase in-store.

4.3   Rise of Circular Economy

Key Trends Driving this scenario

Consumer of the Future

Conscious Consumerism, Sustainability Surge

Rise of New Retail Model

Circular Business Models, Close-looped Production, Sustainable Business Practices

Future-Proofed Supply Chain

Supply Chain Transparency

What can we expect?

1

Purpose-driven and knowledgeable customers

Consumers, especially Millennials and Gen Zs, are concerned about the social, economic and environmental impact of their choices. Instead of 'buying cheap' and 'buying a lot', consumers want to buy products that they truly need and are **ethically sourced and produced**. This shift in consumption pattern prompts retailer to rethink how they operate and produce, finding ways to incorporate sustainability into their brand

2

Embedding sustainability into business operations

To achieve sustainable growth, retailers need to adopt a **closed-loop approach**, where materials used in production can be recollected and reused. This means rethinking the entire product lifecycle from design, sourcing, production to disposal. Start introducing recycling programs, integrating recycling technologies, and improving production forecasting.

3

Uptake in circular business models

Retailers are experimenting with circular business models such as **product-as-a-service, product-life extension, and resource recovery model.** In these models, customers play an active role in reducing their own environmental impact through reducing consumption by renting instead of buying, purchasing parts for repair instead of disposing and returning products for recycling. Such business models will gain popularity as they empower customers to take action directly to reduce their environmental impact.

4

Sustainable marketing as a critical asset

Retailers have to tread a thin line between **sustainable marketing and greenwashing**. While retailers invest in sustainable practices, these efforts could go to waste if they are not being clearly articulated to customers. Worse still, efforts may completely backfire and retailers could be labeled as 'greenwashing' if consumers do not understand the brand's position. Retailers will need to make claims easy to understand, back up claims with actual data and be transparent in their company's sustainability practices and plans.

Opportunities for Retailers

Integrate elements of circularity into business models

- Start with smaller scale programs that require minimal investments such as offering opportunities for customers to return old products for recycling, providing product rental options and educating consumers on how to fix or repair products on their own.

- Monitor performance on these programs to decide which approach best fit business needs.

- Scale sustainability solutions for the long-term by investing in capabilities such as recycling technologies, supply chain capabilities to track and monitor data on raw materials, and improving forecasting to eliminate overproduction and waste.

Be clear and honest with sustainability practices and outcomes

- Set sustainability KPIs and baseline critical measurements to identify areas for improvements. Continuously track and monitor performance and share back progress with customers and stakeholders.

- Be transparent in communicating with customers on progress – back sustainability claims with measureable data where possible.

- Educate customers on sustainability commitments and concepts. Communicate plans for sustainability practices and anticipated environmental impact, leverage social media to amplify brand commitments to sustainability.

- Train or hire for roles that can support sustainable marketing efforts. Provide guidelines to help employees to learn and articulate the company's environmental, social and governance position.

4.4   Growth through Alternative Revenue Streams

Key Trends Driving this scenario

Consumer of the Future

Demand for Innovative Services, Immersive Experiences

Rise of New Retail Model

Monetising Digital Capabilities

What can we expect?

1

Growth in Retail Media Networks

Retailers are in an advantageous position to leverage the vast amount of first-party customer data to build an **advertising business**. With the end of third-party cookies, retail media network will gain popularity as it provides visibility over the end-to-end customer's omni-channel journey. While retailers are able to generate additional income, they have to balance this with the potential impact such as increased competition on their B2C sales.

2

Data Monetisation

Realising the potential value data can bring, retailers have been monetising their data to generate additional income. Besides bringing additional revenue, data sharing enables the retail industry as a whole to better understand customers' needs and react to changes. To do so, retailers will need to evaluate their **data capabilities and define their monetisation approach**. Some retailers may choose to form alliances and exchange data freely, while others prefer to take on pay-as-you-go models.

3

Investing in value-added services

Introducing subscriptions programs and expanding into value-adding services are some ways for retailers to generate additional income streams. Launching applications that offer value-added services such as **online classes, workshops** and partnering with other players allow retailers to reach new customer segments. This benefits retailers in multiple ways such as fostering brand loyalty and enabling retailers to diversify into new product and service lines.

4

Exploration of Web 3.0 Opportunities

While still in its experimental stage, many retailers are starting to invest in the metaverse and foresee it being a valuable revenue stream in the future. The metaverse offers a wide range of possibility for retailers – from acting as **gateways to brand discovery** to enabling retailers to become **digital creators.** As the metaverse scale up, retailers will need to start thinking about investing in customer journey, technology stack and talents to be able to create and sell digital products to a savvy group of consumers.

Opportunities for Retailers

Analyse, identify and plan the 'why' and 'how' of introducing an alternative revenue stream

- Identify capabilities that could be monetised. Retailers have different strengths that could be capitalised or even recombined to create a niche service or product. Some retailers are rich in data, while others have state-of-art technology and innovative services, identify what makes the most sense for your business.

- Ensure that there is sufficient resources to support the growth of the revenue stream for the long-run. This includes having the right people, processes and technology.

- Be clear on the business case for this move. Understanding the 'why' and 'how' and having a long-term vision will help the business to prioritise and balance between the different businesses.

Innovate and partner with vendors who can bring exciting offerings to life

- Experiment with new ideas and monetisation strategies. Besides selling to businesses, retailers can redefine their business model by branching into applications, providing value-added services that can complement your core products and services, or even renting retail spaces out to earn rental income and maximise footfall.

- Partner with vendors to offer new products and services to customers. Work with vendors who have capabilities (e.g., software development, data analytics) who can enhance or add to your current offerings and create a stronger value proposition to support your new revenue stream.

| 4.5 | People-Powered Retail |

Key Trends Driving this scenario

Consumer of the Future

Use of Social Media, Personalisation and Customisation, Seamless and Immersive Experiences

Rise of New Retail Model

Social Commerce, Omni-Channel, Web 3.0 Shopping

Automation & Data

Data-driven Customer Recommendation

What can we expect?

1

Rise in social commerce

Extending beyond social media marketing, social commerce enables consumers to discover a product on social media and instantly purchase it without leaving the platform. This comes in forms such as **shoppable ads** or **interactive livestream shopping**. As social media usage continues to grow, retailers will need to adapt and uncover ways to create great digital experiences and working with influencers to create compelling stories for their brands.

2

Data-sharing as new norm

Consumers are now more willing to provide companies with information in exchange for personalised experiences, as long as they are aware of how data is collected and used. Faced with too many choices, consumers seek for **personalised recommendations** from retailers. From an industry perspective, data sharing could foster new innovation that may benefit consumers in the long-run. For a retailer, being able to navigate between **data collection and protecting consumer privacy** will be a critical focus area.

3

Unified customer journeys

Consumers are interacting with brands across multiple channels and they expect a seamless and consistent experience throughout. **Omni-channel** is the 'new normal' and retailers are harnessing data to understand customer journeys, predict behaviours and taking on a highly customer-centric and personalised approach. Many are also investing in integrations between systems and channels to improve front-end and back-end processes to create a smooth purchase-to-fulfilment journey.

4

Immersive shopping experiences

The pandemic has changed customer behaviours - be it working from home, connecting with friends online or shopping in the digital world, consumers want **immersive, real-time, personalised experiences**. The rise in number of retail brands and virtual stores in metaverse are indication that metaverse shopping and immersive technology are the next wave that could disrupt the sector. Retailers are adapting to a hybrid retail model where virtual and physical stores coexist to support sales and customer engagement.

Opportunities for Retailers

● Invest in Understanding Customer Journeys

- Integrate customer data across various platforms with customer journey analytics software. Track real-time customer data, predict customer behaviours and react timely to ensure customer satisfaction.

- Interpret and share data insights across teams such as marketing, sales, e-commerce and supply chain to motivate teams to take informed actions to improve customer experience across the entire value-chain.

- Start by developing audience persona to define target audience and understand their needs and desire. Based on these personas, identify potential KOLs to collaborate with.

- Measure effectiveness of campaign with tangible metrics such as number of likes and comments. Provide KOLs with discount code to track leads and sales from their engagements.

● Anticipate and Explore Web 3.0

- Research to understand Web 3.0 and its opportunities and risks associated. Refer to brands or retailers who have been experimenting with Web 3.0 technology as use cases and learn from their experience.

- Consider your risk appetite in exploring such technology. Select the right options for your business needs – ranging from modular pieces such as using AR/VR to improve in-store experience to setting up a fully virtual store in metaverse and selling digital-only products.

- Being able to integrate technology seamlessly is critical to avoid frustration from customers. Set up virtual stores such that it replicates the physical store to ensure a seamless customer experience. Design the stores such that it is welcoming, easy to shop in and assistance readily available when needed.

5

MOVING FROM TODAY TO TOMORROW

Understanding the Retail Workforce of Today

A View of the Retail Workforce Today

In today's retail workforce, majority of the workforce are female, with average age of 39 years old. Most workers are in front-line service roles such as sales associate or sales supervisor. The average tenure of a retail worker is approximately 7 years, much higher than the average tenure in Singapore of approximately 2 years[1].

GENDER DISTRIBUTION

31.6%

68.8%

■ Male ■ Female

AGE DISTRIBUTION

Young Worker (between 16 - 39 years old) — **58%**

Middle-aged Worker (between 40 years old - 49 years old) — **19%**

Mature Worker (50 years old and above) — **23%**

Average age
39
Years old
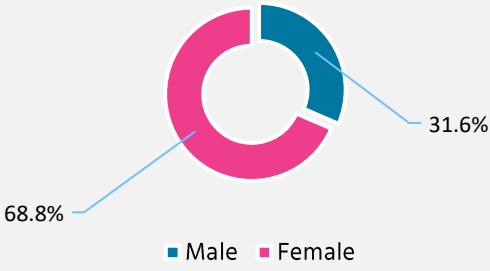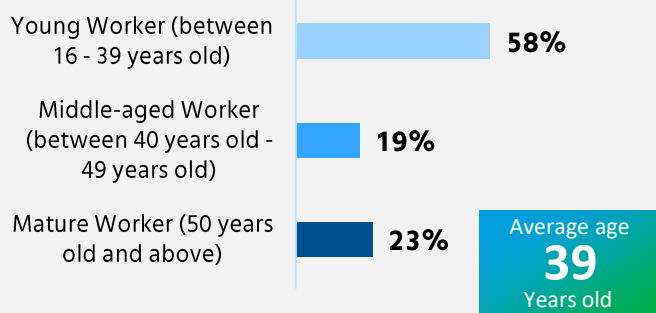
EDUCATION QUALIFICATION OF RETAIL WORKFORCE
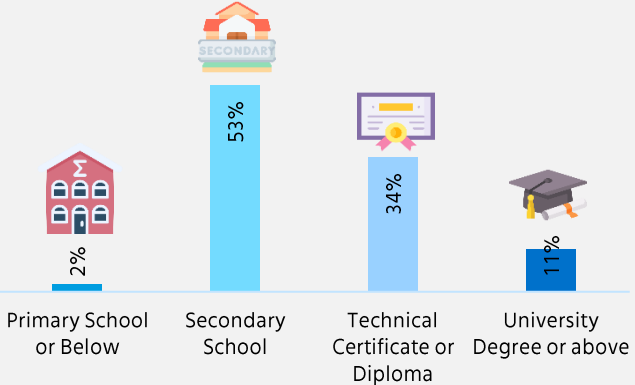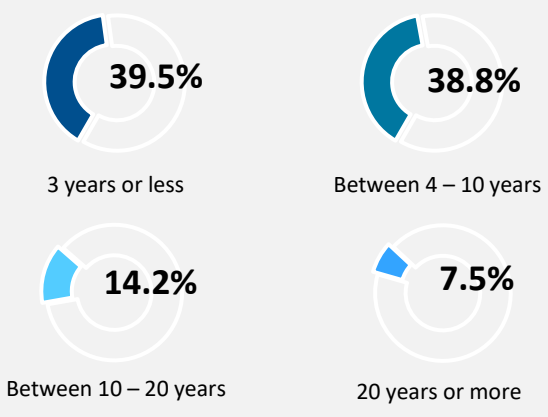
2% — Primary School or Below

53% — Secondary School

34% — Technical Certificate or Diploma

11% — University Degree or above

TENURE DISTRIBUTION

39.5% — 3 years or less

38.8% — Between 4 – 10 years

14.2% — Between 10 – 20 years

7.5% — 20 years or more

Note:
1 – Mercer's Retail Manpower Study Surveys

Attracting & Retaining the Retail Workforce

The Retail Workforce is one that is diverse, with different profiles of employees having unique needs and wants from their retail employers. From Mercer's Industry Survey, we uncovered key attraction and retention factors in the retail sector which will be instrumental in supporting retailers to restructure their Employee Value Proposition (EVP) for the future.

Uncovering what matters to job seekers and retail employees…

What attracts candidates to join a retail organisation?

How can retailers better retain their workforce?

….to tailor retailer's Employee Value Propositions (EVPs).

Emotional

Purpose — *What can retailers do to support employees and help employees find value and meaning in their work?*

Experiential

Careers **Well-being** — *What can retailers do to create career opportunities and support employees' well-being and work-life balance?*

Contractual

Compensation **Flexibility** **Benefits** — *How can retailers rethink about compensation and benefit packages to support employees?*
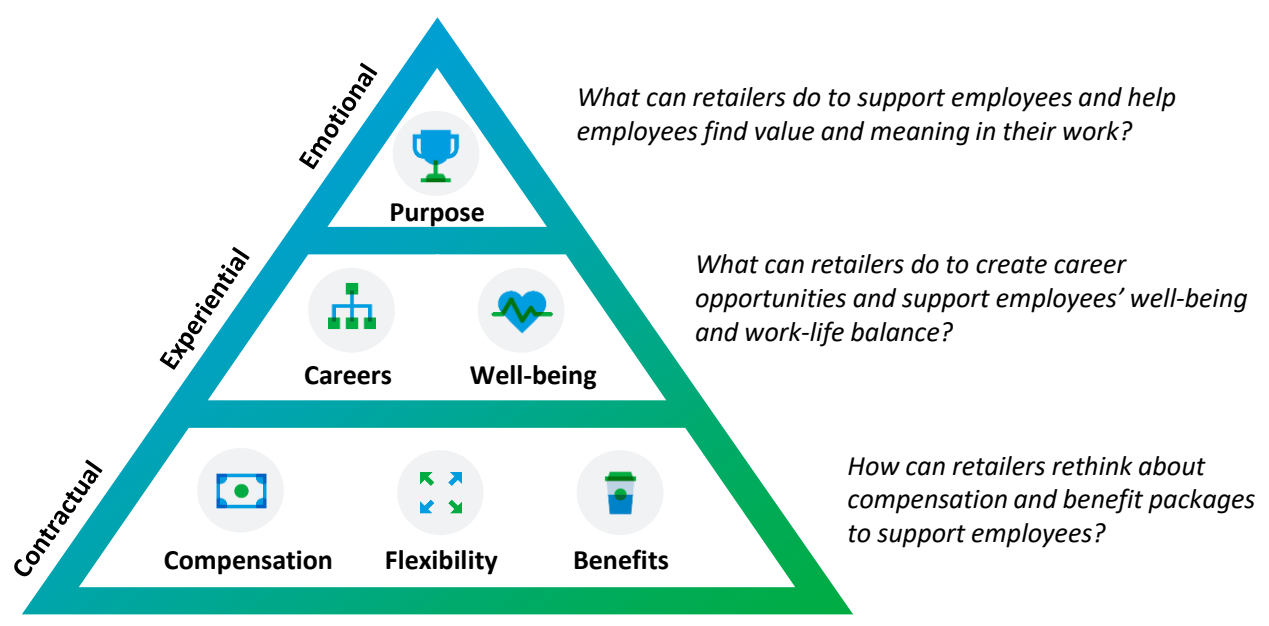
Introducing Employee Value Proposition (EVP)

Employee Value Propositions (EVPs) have become a common part of organisations' talent acquisition and retention strategies, defining what organisations offer to employees in exchange for employees' commitment and contributions. Organisations need to have a holistic understanding of the values employees desire, when attracting and retaining talent in the retail sector.

Mercer's Employee Value Proposition Model

Purpose

Emotional

Meaningful work
Non-monetary recognition
Good colleagues

Brand & reputation of employer

Careers   **Well-being**

Experiential

Paid time off
Career opportunities
Job security
Solid work-life balance

Well-being support
Training and development opportunities

Compensation   **Flexibility**   **Benefits**

Contractual

Competitive compensation
Significant level of variable pay
Flexible working options
Retirement benefit

The inability for companies to accurately match employees' demands due to evolving beliefs in employees give rise to unmet needs, driving employers to constantly update, understand and rethink the go-to-market strategy and EVP across all levels and cater to different employee segments.

Attracting Job Seekers into the Retail Sector

Based on our survey findings, mid-career switchers were attracted by the sector's strong branding and career progression opportunities while fresh graduates are mostly driven by their passion for retail and positive work experiences. On the other hand, it is evident that perceived unattractive compensation package is a key factor deterring job seekers from joining the retail sector.

	Fresh Graduates	Mid-Career Switchers
Reasons for joining the retail sector	1. Passion for working in retail sector 2. Positive past work experience	1. Organisation brand 2. Career Progression Opportunities
Reasons for not being interested in retail	1. Lack of career progression 2. Unattractive compensation package	1. Unattractive compensation package 2. Lack of work-life balance

PASSION WORKERS

- **Purposeful work:** Job seekers believe that retail roles will enable them to solve complex customers queries
- **Dynamic Work Environment:** Retail work environment provides opportunities to engage variety of stakeholders and interact with like-minded employees.

VALUE OF STRONG BRAND

- **63%** of respondents[1] indicated preference to join **brand owners.** Job seekers acknowledged the growth in DTC retail brands and showed greatest interest in joining such retailers.
- Job seekers also flagged out that the sector's branding and image needs to be improved to attract and retain them in the sector.

UNATTRACTIVE COMPENSATION

- **90%**[1] of respondents indicated compensation as the most important factor to consider when joining a retail organisation.
- Most respondents felt that the sector was not paying competitively and wages were lower than the average per capita income in Singapore.

Note:
1 – Mercer's Retail Manpower Study Surveys

Matching Job Seekers' Interest & Retailers' Business Needs

Looking across job seekers and retailers' business needs, there are opportunities for job seekers to be employed in e-commerce and retail operations roles in the retail sector.

Top 5 roles that will face the greatest % gap by 2030[1]
Based on gap / forecasted demand

Role	%
Omni-channel Manager	10%
Supervisor	10%
E-commerce Executive	10%
E-commerce Manager	9%
Marketing Executive	8%

Top 5 roles that job seekers are most interested in[2]
Please indicate your interest in the key job roles in the retail sector

Role	%
E-commerce Manager	62%
Brand Manager	59%
Sales Associate	50%
E-commerce Executive	46%
Visual Merchandiser	46%
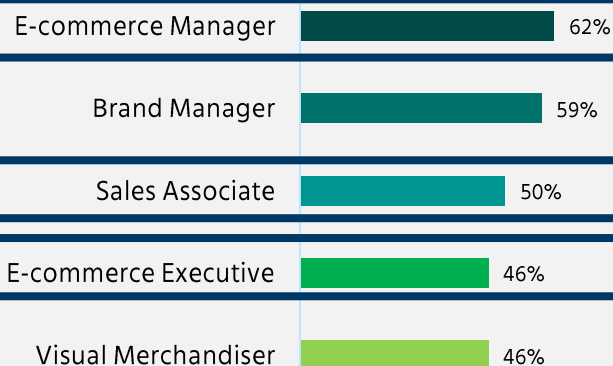
Roles such as **e-commerce manager and omni-channel manager** will be high in demand as retailers shift towards online commerce and omni-channel approach. At the same time, retailers are continuing to deepen marketing capabilities and curate in-store experiences resulting in demand for marketing and retail operations roles such as **supervisor.**

From a job seeker perspective, e-commerce roles such as **e-commerce manager and executive** are attractive and sought after within the retail sector. Job seekers are also open to retail operations roles such **as sales associate**, indicating a match with retailer's business needs.

While current job seekers continue to explore opportunities in these job roles, forecasts[1] suggest that the demand from digital expansion outweighs the supply of talent joining these roles. Hence, retailers should ensure training and upskilling are provided to interested retail employees, to enable them to transition into these roles.

Note:
1 – Mercer's Retail Manpower Projections: Figure derived by taking forecasted manpower gap (demand – supply) divided by forecasted demand
2 – Mercer's Retail Manpower Study Surveys

Retaining Retail Employees in the Sector

From a retail employee perspective, retailers that can provide interesting work and strong branding will be able to retain their retail talents. However, concerns on work-life balance and career progression are driving retail employees away from a long-term career in the sector.

	Current Retail Employees
Reasons for staying in the sector	1. Interesting work 2. Organisation brand
Reasons for leaving the sector	1. Lack of work-life balance 2. Lack of career progression

Interesting work & strong brand

- For current retail employees, the sector is seen as a **dynamic and vibrant** environment with interesting work and retail brands that are meaningful and provide valuable products and services for consumers.
- **26%** of respondents[1] indicated that interesting and fulfilling work was the top reason for joining the retail sector.
- **62%** of respondents[1] indicated that they would prefer to work with brand owners over distributors in the retail sector, given similar roles and working conditions.

Lack of work-life balance

- **The lack of work-life balance has been cited as the top reason** why employees may leave the retail sector.
- In particular, employees mentioned that they would like a **more flexible working schedule**, more **break time** for employees during work, and **shorter working hours.**

Lack of career progression

- Only **3 in 5** retail employees understand the potential career paths available in their current retail organisation[1].
- Similarly, only **64%** felt that their career goals could be met in the current organisation[1].
- This indicates limited understanding of career opportunities in the retail sector and a need for retailers to better educate employees' on career progression.

Note:
1 – Mercer's Retail Manpower Study Surveys

5.1 Understanding the Retail Workforce of Today

A Call For Change in the Retail Sector

Globally, it is clear that C-suite and HR leaders[1] are driving the agenda to revamp and elevate employer brand to attract and retain retail talents. This is aligned with what we see in Singapore, where local HR and business leaders are committed in attracting locals and younger employees into the sector as well as retaining retail talents within their organisations.

Global C-suite and HR leaders

47%
of CEOs in retail looking to revamp the current employer brand

vs. **39%** across industries

53%
HR leaders were planning to elevate the brand as a Responsible Employer

vs. **50%** across industries

36%
of CEOs in retail are re-evaluating purpose of work

vs. **33%** across industries

49%
HR leaders use workforce planning tools that focus on skills over headcount

vs. **47%** across industries

Local HR / Business Leaders

Overall, these coherent strategies are relevant in addressing specific manpower issues identified in the next 5 to 10 years:

1. **Attracting Singaporeans into the industry**
2. Providing competitive pay to meet expectations
3. **Attracting younger generations into the industry**
4. **Retaining manpower within the company**
5. Availability of manpower with right skills

Note:
1 – Mercer's Global Talent Trends 2022: Retail

Attraction and Retention Strategies for the sector

Overall, the retail industry has to focus on factors driving employees into the sector, while establishing new HR practices to enable a sustainable workforce size in retail. Employees are increasingly demanding for greater employee value proposition in order to work in the retail sector. Retailers have to balance rising costs of employees and lower engagements levels to determine best HR practices to attract and retain talent:

Pyramid diagram with three tiers:
- **Emotional**: Purpose
- **Experiential**: Careers, Well-being
- **Contractual**: Compensation, Flexibility, Benefits

1 Starting from the basics

- Examine the return on investment on increased compensation or benefits on employee outcomes such as retention and engagement.
- Establish a fair pay / responsible rewards practice
- Establish flexible working policies
- Ensure contractual elements are competitive but expand the definition of rewards beyond this.

2 Focusing on Employee's Experience

- Upskill managers to have meaningful career conversations with employees.
- Offer career growth opportunities by structuring career frameworks.
- Educate and share opportunities for career progression to current and prospective employees
- Invest in employees' financial, physical, social and emotional well-being.

3 Creating a Thriving Environment

- Establish your brand purpose – clarify what your organisation stand for and what values does it advocate
- Put in place recognition programs and team activities to build a culture that values employees.
- Communicate the value proposition in an engaging and personalised way and develop managers to be advocates.
- Design meaningful and interesting job tasks to allow employees to develop skills and contribute to the organisation.

Future of Retail Jobs and Skills

Looking across 16 pivotal retail roles in the sector, 4 key insights emerged consistently. These key themes outline the expected changes in retail roles and will be further elaborated in each <u>job profile</u>.

Multi-dimensional retail roles

Retail roles will evolve to become multi-dimensional, where employees are expected to undertake a wider range of retail tasks and develop new skills that are outside of their traditional job scope. This means that most roles will be enlarged to perform activities across the end-to-end retail value chain, and have greater autonomy to perform higher-value tasks such as participating in creative (e.g. product design, marketing campaign design) or knowledge management initiatives (e.g. process improvement).

Leveraging technology to create higher-value retail roles
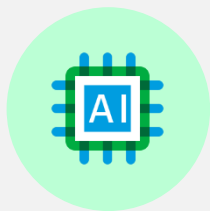
While technology optimises manual retail tasks, it will not replace the need for a retail employee. Instead, it frees up capacity for retail employees to focus on higher value work such as customer advisory. In some cases, it creates a demand for upskilling so that employee can reap its benefits.

Data-driven decision making

The sector sits on a trove of data ready to be analysed and leveraged for decision-making. The focus now shifts towards whether retailers could effectively analyse and utilise data insights. Moving forward, most retail roles will need to understand and tap on data insights to make better decisions.

Customer at the core of retail roles

Successful retailers put customer first and organise their operations around customer needs. This is increasingly important as consumers demand for a consistent experience in an omni-channel world. Retail roles will be redesigned to focus on supporting and building relationships with consumers.

Future of Retail Jobs and Skills

It is clear that the sector is ongoing a huge transformation and the retail workforce will need to be prepared for changes. This section outlines the experiences for different profiles of retail employees and provides pointers for retailers and incumbents to navigate through the change.

In particular, 3 critical profiles of retail employees are flagged out to illustrate their thoughts on the sector and their job as the sector continues to transform.

Mature Worker	Mid-Career	New Entrant
Cheng, 56	**Olivia, 35**	**Sam, 25**
Sales Supervisor at Local Supermarket	Retail Operations Manager at a Global Retailer	Business Analytics Major Fresh Graduate

Mature Worker

Let's follow the journey of Cheng, a mature sales supervisor, who is navigating through work environment changes and upskilling himself.

Cheng, 56 years old
Sales Supervisor; 25 years of experience in a local supermarket

CHALLENGES IN TRANSITION

Cheng has been working in a **local supermarket for 25 years**. Throughout his years, he has seen massive changes to the industry. From the introduction of digital tools to working with new generation of retail workers, he finds it **challenging to keep up with changes** and wishes things could stay the same.

RESISTANCE TO CHANGE

The company announced that they will be trialling a new technology that will impact store operations. Cheng did not like the idea of another major disruption to the store. He voiced his resistance to his director, Mr. Lim, who recognised that this change could be alarming to established workers like Cheng.

COMMITMENT TO UPSKILLING

To support mature workers, Mr. Lim introduced initiatives such as training days and job redesign to transit mature workers into higher value roles. Cheng attended some courses on in-store digital applications and visual merchandising. Cheng's role was also redesigned to replace manual tasks with higher-value activities.

APPLYING LEARNING

In his newly redesigned role, Cheng got the opportunity to support visual merchandising activities. Thanks to his training, he was able to confidently apply what he learnt. While he faced minor hiccups along the way, he felt more confident to reach out to his director and colleagues and could see the value of his work.

REFLECTING & ADAPTING

Cheng realised that he needs to stay open and adapt to changes. He felt well-supported and was very pleased that he could pick up new skills such as visual merchandising. Before he retires, he wants to spend his remaining years productively, learning new knowledge and skills.

Mid-Career

Let's follow the journey of Olivia, a mid-career manager, who is looking for new opportunities in another track.

Olivia, 35 years old

Retail Operations Manager; 8 years of experience in global retailer

TIME FOR A MOVE

Olivia has been in retail operations for 8 years and has learnt the ins-and-outs of running successful stores. As the retail sector digitalises, she develops a growing interest in e-commerce. She wonders if she could take up a new challenge by moving into an e-commerce role.

PLANNING FOR THE MOVE

Olivia starts researching on how could she make a career switch. To start off, she consulted her financial advisor to ensure she is in a good financial position to make the career switch. She then **tapped on her network** to speak with **e-commerce specialists** to understand their work and skill sets needed.

RESKILLING

To appeal to recruiters, Olivia needed to get accredited with skills such as SEO and product management. She enrolled into SSG's offered courses using her SkillsFuture Credits. While it was not an easy journey, Olivia was persistent and her experiences in retail sector helped her to get up to speed quickly.

STARTING FROM SCRATCH

Olivia's learning paid off when a retailer reached out to discuss about an e-commerce role. They thought that her retail operations experience was relevant and saw that she had take on additional self-learning. As she was new to e-commerce and they offered her an e-commerce executive role. Olivia was excited but she knew she had to put in hard work to prove herself.

NO LOOKING BACK

Within a year, Olivia learnt a lot about e-commerce. She knows that the e-commerce market is growing and she is excited to be involved in enhancing customers' online experience. Importantly, Olivia felt fulfilled and excited about her work, feeling excited about long-term future opportunities in this space.

New Entrant

We follow the journey of Sam, a young business analyst, who is exploring opportunities in the retail sector for his first job.

Sam, 25 years old
Business Analyst, Fresh out of school

PERCEPTION OF THE SECTOR

Sam graduated with a bachelor's in business analytics. He is looking for a business analyst role and is very excited to start his first job. He attended career fairs and had retailers reaching out to him. However, he was slightly sceptical about the career progression in the retail sector.

BRAND VALUE ALIGNMENT

As he continued his job search, Sam was contacted by a recruiter from a brand he loved. Sam thought that the brand values really resonated with him and he was excited to explore more opportunities. The recruiter recommended Sam to apply for the customer intelligence analyst. This role piqued Sam's interest as it tapped on his business analytics skills.

PIQUED INTEREST

Sam applied and got the role. As he started his work, he realised that the sector was sitting on a treasure trove of data waiting to be analysed. Sam was also involved in many cross-functional work activities which enabled him to pick up new, valuable skills. He started to fully understand the end-to-end retail value chain better.

ENHANCED EMPLOYEE VALUE PROPOSTION

Sam's employer knew that this is his first role and they wanted to assure him about his career progression with the company. Besides having mentors he could trust, Sam also had protected training time and explored secondment opportunities. Sam also volunteered for initiatives to drive the brand mission which made his experience extremely meaningful.

EXCITEMENT AHEAD

After a year in, Sam's perception of the sector has completely shifted. He enjoys the multi-faceted challenges in the sector and is excited to be part of the sector's transformation efforts. As he continues his journey, he believes that the company was committed to his career growth and he could develop core skills and experiences will serve him well in the future.

| 5.3 | **Supporting the Transition** |

Resources for Retailers & Retail Workforce to Leverage

New Hires in Retail	New Hires & Existing Employees in Retail
CCP for SME Executives • **Only for SMEs** • **Only for New Hires in PMET roles** 3-months programme with a 3-day workshop and On-Job-Training that aims to help PMETs to reskill and take on new job roles in retail SMEs and for SMEs to recruit and train the right talent.	**CCP for Retail Industry** • **For all retail companies** • **For New Hires and Existing Staff** Up to 6-month programme comprises a customised structured On-Job-Training with facilitated classroom training, to equip new hires with the necessary competencies and skills to take on new, redesigned, hybrid and/or emerging job roles with good career prospects in the retail industry such as Customer Experience Ambassadors.
CCP for E-commerce Professional (Supply Chain) • **For all retail companies** • **Only for Mid-Career New Hires** 9-month programme to help companies equip their mid-career new hires with e-Commerce knowledge so that they can better transit into their new roles. The programme includes 10 days of Classroom Training, On-Job-Training, 9 days of Mentorship & Project Work and a Capstone Project.	**CCP for Furniture Industry Talent** • **Only for retailers in the furniture subsector** • **For New hires & Existing Staff** 3 to 6-month programme equips retail employees with in-demand skill sets and knowledge through On-Job-Training and classroom training in Furniture-related Job Functions. Job Functions include: Retail Ops, Merchandising, Branding, E-commerce, Marketing, Sustainability, Data & AI, Franchising or Design.

Mature Mid-Career Individuals

SGUnited Mid-Career Pathways Programme
- Companies can tap on programme to take on **mature mid-career individuals (aged 40 and above)** on attachments of up to 6 months on top of their usual hiring capacity.
- Government will fund 70% of the training allowance
- To encourage early conversion of trainees to full-time employees, host organisations will continue to receive training allowance subsidies for the converted trainees, if the trainees has completed at least three months of the attachment.

This programme aims to help mature mid career individuals acquire industry-relevant experience through attachment with host organisations.

Note:
List of resources available are non-exhaustive and subjected to changes

5.3   Supporting the Transition

Resources for Retailers & Retail Workforce to Leverage

Retailers

Support for Job Redesign under Productivity Solutions Grant (PSG-JR)
- Job Redesign Framework for Retail to access self-help resources such as comprehensive templates to implement job redesign and recommended pre-fitted solutions.

WSG has worked with industry partners to develop sector-specific solutions that streamlines business processes and build new capabilities to enhance workforce productivity.

Service Industry Transformation Programme (SITP)
- Administered by SGPC, the SITP seeks to help enterprises in the lifestyle sectors become more productive and manpower-efficient
- Participants will go through workshops and learning journeys to provide them with a foundation of key concepts by SGPC's certified consultants followed by 1-to-1 project guidance with individual companies

The programme supports lifestyle sector companies to uplift organisational capabilities in innovation, job redesign and manpower planning.

Capability Transfer Programme
- The programme seeks to improve local-foreign workforce complementarity by facilitating the transfer of capabilities from foreign specialists to locals to encourage a culture of pervasive capabilities transfer across all sectors and entities
- Companies to develop and acquire new capabilities in Singapore by ensuring that there is sustainable supply of Singaporeans with the requisite skillsets
- Funding support include attachment-related costs and salary support for foreign and local specialist, as well as Singaporean trainees on overseas attachment to acquire new capabilities
- Will include support for the transfer of capabilities through remote training from foreign specialists

The programme facilitates the transfer of global capabilities to your local workforce.

New Part-Time Re-Employment Grant
- Provides up to $125,000 to employers who offer part-time re-employment, other flexible work arrangements (FWAs) and structured career planning (SCP) to senior workers.
- The Funding Quantum will be based on $2,500 per resident senior worker (age 60 and above).

The grant incentivises companies to offer part-time re-employment, flexible work arrangements and structured career planning to senior workers.

Note:
List of resources available are non-exhaustive and subjected to changes

6

JOBS AND SKILLS

Drawing Inspirations from Mercer's Work Design Methodology
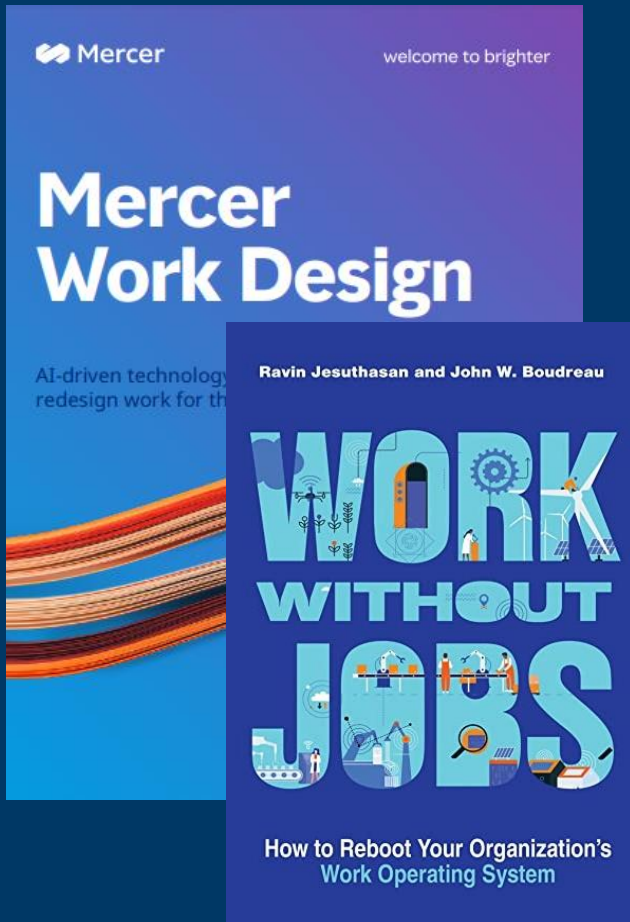
Mercer's Work Design methodology is rooted in the idea that **jobs can be deconstructed into tasks**, which could be performed by alternative work arrangements such as robotics, AI, gig worker, outsourced or centralised. By rethinking the concept of work, we are able to identify tasks that may be redeployed or changed and subsequently reconstruct the work.

There are 3 key steps in the methodology:

Deconstruct Jobs into Tasks

- Analyse the tasks and activities that underpin jobs and workflows.

- Identify tasks that may be most greatly impacted by or best suited for automation and job redesign.

Analyse Impact on Tasks

- Analyse potential automation impact on tasks

- Analyse potential job redesign implications on tasks

Reconstruct the Work

- Analyse changes to job as a result of automation and job redesign

- Reconstruct the future profile of the role

- Outline the changes in tasks and skills needed to support the role

6.1   Our Methodology At A Glance

Applying Mercer's Work Design Methodology to analyse Retail Jobs and Skills

1. DECONSTRUCTING THE WORK

Retail Employees

Retail Jobs
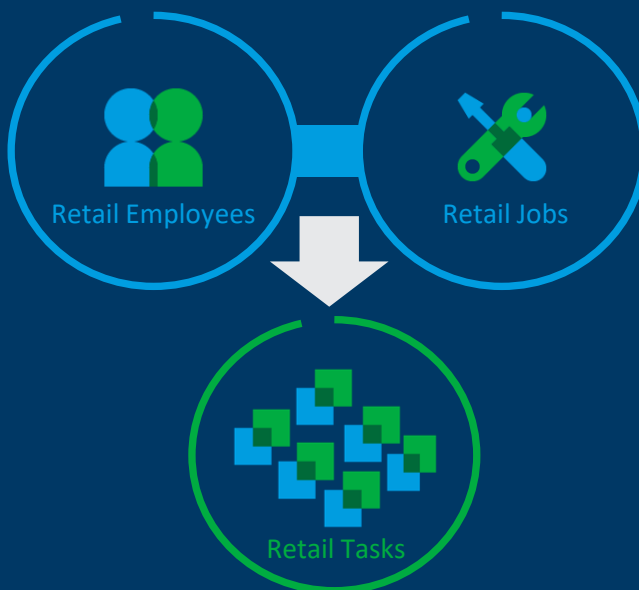
Retail Tasks

2. ANALYSING DISRUPTION ON TASKS
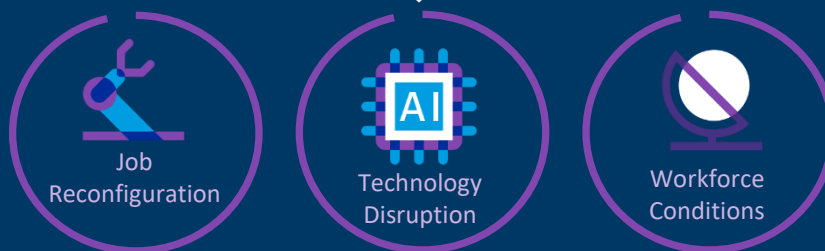
Job Reconfiguration

AI
Technology Disruption

Workforce Conditions

3. RECONSTRUCTING THE WORK

Enlargement

Enrichment

Job Reconfiguration Impact

Displaced

Complemented

Augmented

Technology Disruption Impact
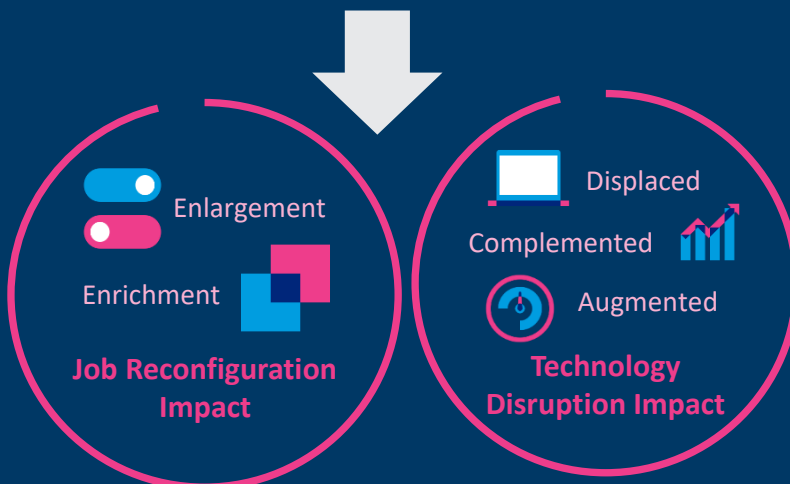
6.1   Our Methodology At A Glance

1. Deconstruct Jobs into Tasks

The retail job roles were mapped to the Retail Skills Framework (SFw) Roles where possible, and included additional roles in the study. The intent was to leverage a single source to **ensure consistency** and additional roles were proposed to **provide coverage across the end-to-end retail value chain**.

| Mapping of Pivotal Roles to Retail SFw Roles ||
Common Retail Job Roles	Mapped Retail SFw Roles
Retail Operations Manager	Retail Operations Director
Store Manager	Store Manager
Sales Supervisor	Sales Supervisor
Cashier	Sales Associate
Shop Sales Assistant	
Customer Service Officer/Clerk	
Marketing Manager	Marketing Manager
Other Commercial and marketing sales executives	Marketing Executive
Online sales channel executive	E-commerce Executive
Visual Merchandiser	Visual Merchandiser
Merchandising/Category Manager	Merchandising Manager
Merchandising/Category Executive	Merchandising Executive
Supply and distribution/logistics/warehousing manager	Warehouse Operations Manager
Logistics/Production Planner	Logistics Operations Analyst Logistics Solution Analyst

Additional roles included in study
Brand Executive
Brand Manager
E-commerce Manager
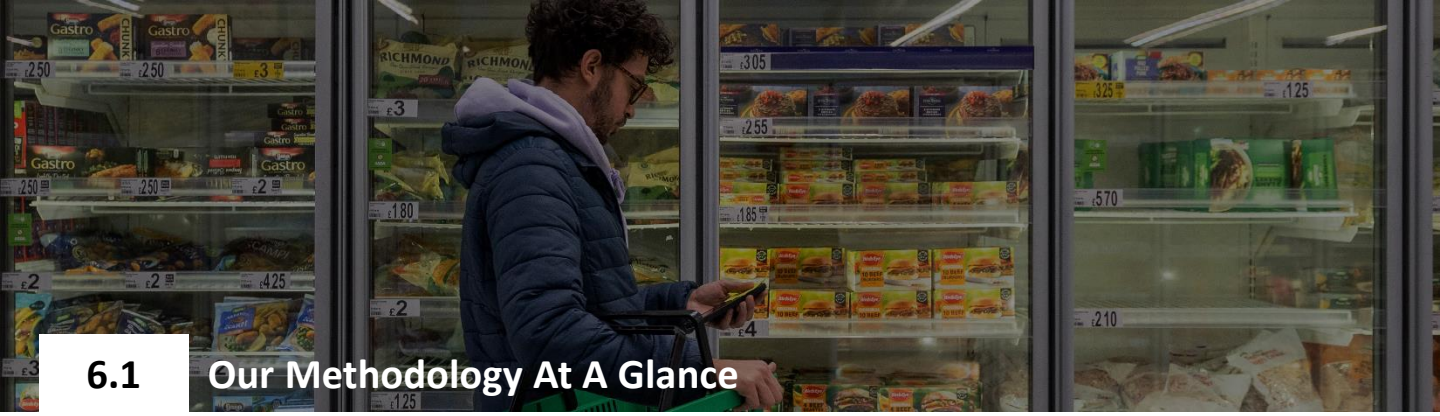
6.1 Our Methodology At A Glance

1. Deconstruct Jobs into Tasks

The Retail Skills Framework job profiles served as a key reference in identifying work functions that are the most critical and disrupted for each job role. **To identify which critical work function to focus on**, we based our analysis on the following criteria for consideration:

FUNDAMENTALITY TO ROLE
- The first criteria measures how important this work function is to the role. It attempts to capture the **'major' work activities** that are fundamental and significant to this role.
- Questions we considered: **Does this activity define the role? Will this work function become increasingly significant for the role?**

PROPENSITY FOR DISRUPTION
- The second criteria measures the potential for the work function to be disrupted by both tech and non-tech disruptors. It attempts to **capture work functions that would undergo most change** in the future.
- Questions we considered: **How likely will this work function be disrupted by both tech and non-tech disruptors?**
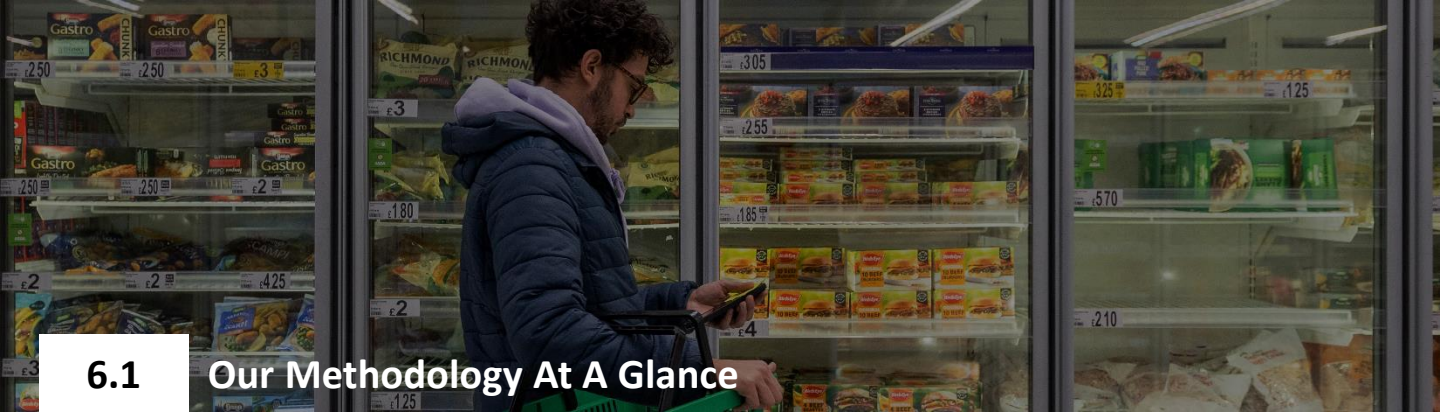
6.1 Our Methodology At A Glance

2. Analyse Disruption Impact

Through **secondary research and industry engagements,** impact of trends and macro-factors were analysed to understand how might they impact retail roles and critical work functions.

Secondary Research ➕ Industry Validation

Secondary Research

Government Sources

Skills Framework for Retail

Enterprise Singapore — Retail 2025 and beyond, Industry Transformation Map

Local, Regional & Global Secondary Research Sources

Passport — Retailing in Singapore, Euromonitor International, February 2021

World Economic Forum — Future of Retail - Operating Models of the Future

Asia Pacific Retail Trends (APAC)

Future of Retail (APAC)

Industry Validation
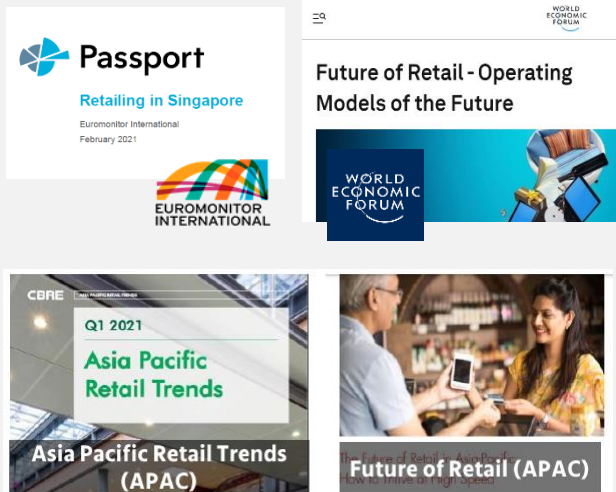
Thought leadership interviews

CHARLES & KEITH
FairPrice
By Invite Only
BHG
GAIN CITY

Industry Validation Sessions

BOOKS Kinokuniya
SECRET LAB
UNDER ARMOUR
Commune HOME

Associations Engagement

SRA — SINGAPORE RETAILERS ASSOCIATION
SIRS — SINGAPORE INSTITUTE OF RETAIL STUDIES
sme
Singapore Productivity Centre

2. Analyse Disruption Impact

Through **secondary research and industry engagements,** we have considered the impact of the 4 key trends, and their drivers, to understand how they might change impact retail roles and critical work functions.

Analysing Impact of Trends and Key Drivers on retail roles

Consumer of the Future	New Retail Model	Automation & Data	Future-proofed Supply Chain	International-alisation	Productivity
Demand for personalisation and customisation means that retail roles are evolving to being more **customer-centric.**	The move towards **e-commerce and omni-channel retail** will require retail employees to develop and strengthen their abilities in these domains.	The increasing accessibility of data has led to an expectation that retail employees should possess skills to **comprehend and apply data insights** to enhance their work functions.	As supply chains become more complex, new activities will arise to **manage end-to-end supply chain operations** and **foster partnerships** with ecosystem players.	With retailers expanding overseas, some work functions will shift to **encompass a broader geographic area**, resulting in the need for the acquisition of new skills.	Technology and automation **reduces reliance on manpower** and enable retail employees to **take on new work functions**, leading to increased productivity.

Ultimately, impact across critical work functions were assessed based on two criteria:

Reinventing Job Scopes

Technology Disruption
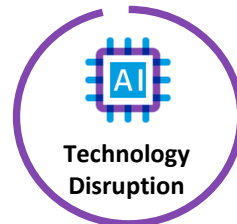
Job Reconfiguration	
Job Enlargement	Job Enrichment

Technology Implementation		
Displaced	Complemented	Augmented

2. Analyse Disruption Impact

Deep-diving into each of the critical work function (CWF), the degree of disruption across these two factors were identified:

Definitions for degree of disruption			
Disruption Type	**High**	**Medium**	**Low**
Technology Disruption	Technology implemented with the aim to automate, substitute or elevate existing tasks performed by incumbents (e.g. 80% automation of tasks)	Existing tasks needs to be performed through a combination of technology and incumbents, with a demand for increasing deployment of technology to substitute, simplify or elevate parts of the job role.	Existing tasks will continue to be mostly performed by incumbents, with technology playing a role to complement or enlarge some elements of the role.
Reinventing job scopes	Business models and processes are transforming rapidly, resulting in disruption in work functions and as a result, key tasks and skills. New work functions or jobs might emerge while existing ones could be made redundant; there is significant job redesign.	Business model and processes are changing with a moderate impact of work functions and tasks. It is expected for tasks to be augmented / enriched to align with business models or processes when necessary; there is moderate job redesign.	Business models and processes are unlikely to change significantly. The overall purpose of the role would remain the same and task changes will be more gradual / in line with current evolutions of the role.

Applying our analysis to each critical work function

Critical Work Function (CWF)	Potential Disruption on the CWF
Achieve sales **Technology Disruption** — High **Reinventing Job Scopes** — Medium	Empowering staff with access to technology and data to enhance customer service: • **Real-time inventory and information management system** to provide visibility and empower staff with real-time information to answer queries surrounding products • **Customer data and analytics**: Retailers are equipping associates with tools armed with insights about existing customers and preferences, in order to better connect with shoppers • **Heightened customer expectations:** Customers expect service on both offline- and-online channels and will turn to sales associate for personalised recommendations, product advice and after-sales assistance.

3. Reconstruct the Work

Finally, the analysis highlighted the implications on tasks and identified the types of impact to the role.

Types of Impact to the Role

Technology Implementation			Job Reconfiguration	
Displaced	**Complemented**	**Augmented**	**Job Enlargement**	**Job Enrichment**
Technology will **substitute tasks** performed by the role, making these tasks **obsolete.**	Technology will **simplify tasks** performed by the role, making these tasks more **efficient.**	Technology will **elevate tasks** performed by the role, making these tasks more **value-adding.**	Addition of tasks that are of **similar responsibilities** as a result of megatrends and consumers needs.	Addition of tasks that are **more demanding and complex** as a result of megatrends and consumer needs.

Implications on Tasks and Skills

Existing task…   **…Envisioning the new tasks**

Facilitate customer interactions to sell products & services	• Record and store relevant consumer data on customer-relationship management (CRM) systems, to better understand customers' demands. • Utilise customer data and insights to provide product recommendations based on customers' demands.

Upskilling of existing skills

Customer Relationship Management Operations
Service Excellence
Service Leadership

New skills required

Omni-channel Management
In-store digital applications

Jobs and Skills Impact Overview

Across all the retail roles defined in the scope of this study, there were 2 roles that will experience low impact, 10 roles that will experience medium impact and 4 roles that will experience high impact. To understand the detailed changes in each role, please refer to the <u>job dashboard and detailed job profile</u> for each role.

4 High impact roles

- ► Sales Associate
- ► Sales Supervisor
- ► Merchandising Executive
- ► Merchandising Manager

10 Medium impact roles

- ► Store Manager
- ► Retail Operations Director
- ► Marketing Executive
- ► Marketing Manager
- ► E-commerce Executive
- ► E-commerce Manager
- ► Warehouse Operations Manager
- ► Logistics Operations Analyst
- ► Visual Merchandiser
- ► Brand Manager

2 Low impact roles

- ► Brand Executive
- ► Logistics Solutions Specialist

6.2 Job and Skills Impact Analysis

The job and skills impact analysis consists of a job dashboard and job profile. The **job dashboard** provides a summary of the key impact and disruptors on the tasks and skills of the job, while the **job profile** contain detailed descriptions of how jobs and skills are changing in the retail sector.

Job Dashboard User Guide

SALES ASSOCIATE

1 Hi! I am Georgina and I work as a **Sales Associate.**

At work, I guide customers in interacting with our in-store digital tools and support customers in their O2O2O journey by answering queries and providing personalised recommendations.

1 | Description of future of the role

OVERVIEW OF IMPACT TO THE ROLE

2 Level of Impact

HIGH

Time Horizon

Immediate   Mid-term   Long-term

2 | Level of impact to the role and time horizon of impact*

3 Key Trends driving Impact

Consumer of the Future   New Retail Model   Automation & Data   Future-proofed Supply Chain

3 | Key trends driving changes to the role

4 ⚠ **Highly Impacted Retail Archetypes**

Supermarkets & Convenience Stores	Small and Medium Enterprises
Digital Player	Digital Leader

4 | Identified highly impacted retail archetypes

Note:

Refer to 6.1 Methodology for details on job and skills impact analysis

Job Dashboard User Guide (cont'd)

Job Dashboard: Retail Operations

5 **Identifying the types of technology and non-technology impact to the role***

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology: Role will be supported by automation of repetitive and transactional retail processes.
	Complemented by Technology
Job Reconfiguration	**Job Enlargement:** Role will take on additional responsibility of managing **online-to-offline sales fulfilment.**
	Job Enrichment: Role will deepen emphasis on **customer experience** and cust...

Identified new skills required for the role

6 **Skills to Grow**

Product Advisory
From proficiency level 1 to 3

After-Sales Service
From proficiency level 1 to 2

Service Excellence
From proficiency level 1 to 3

7 **New Skills Required**

- Omni-channel Management
- Customer Experience Management
- In-store Digital Application and Assistance

Sales Associate will be expected to upskill in:

- **Product Advisory**: Convey product knowledge and identify opportunities for cross-selling and upselling of complementary products
- **After-sales service**: Monitor process of after-sales services including coordinating product returns or exchanges with respective departments
- **Service Excellence**: Respond to service opportunities and escalate service challenges independently.

*Skills and proficiency levels are identified based on Skills Framework for Retail

6 **Upskilling of skills and write-up on tasks expected of the role**

Retail Operations

► Sales Associate

► Sales Supervisor

► Store Manager

► Operations Director

Pivotal Roles In Focus

Sales Associate
High Impact

Sales Supervisor
High Impact

Store Manager
Medium Impact

Operations Director
Medium Impact

Retail Operations of Today

- Manages and performs transactional in-store tasks such as order fulfilment, responding to walk-in requests and managing store inventory

- Develops sales strategies that maintain and achieve sustainable sales growth for the brand

The Future of Jobs in Retail Operations

1	Driving **digital implementation**	To create a seamless and attractive retail experience, **automation will serve as a key driver** in removing the need to perform repetitive tasks. Retail operations job roles need to be **well informed digitally to operate digital tools that better serve customers**, and deliver new retail experiences in the stores to attract and retain customers.
2	**Increasing focus on customer-centricity**	The retail operations function will place a **greater emphasis on enhancing customer's in-store experience**, understanding customers' needs and **establishing a close, personalised customer relationship** to drive sales activity.
3	Supporting **non-traditional sales** and fulfilment	Innovative business models (e.g. omni-channel sales channels, multi-dimensional roles) drive retail operations roles to **take on non-traditional roles**, such as **assisting in merchandising activities** (e.g. identifying product demand; arranging product displays) and **fulfilling e-commerce activities in physical stores** (e.g. online-to-offline sales).

Trends in Retail Operations

Key Impact	What are we seeing	The New Norm
Multi-channels to Omni-channel	**Organisations have begun to integrate both physical and digital channels to create a unified customer experience.** • **Omni-channel retailing and serving customers via a unified and convenient experience** have become highly relevant and supported many retailers during the pandemic. **Linked channels to allow for transactions beyond time or location constraints** Click and collect / BOPIS — Ship from Store / BOSFS — Ship to Store Reserve in Store — Return to Store — Online Stock Availability	**Retailers will continue to equip both in-store and online operations with the capabilities to support seamless purchases and experiences.** • There is a **need to empower retail operations staff with easy access to real-time customer and/or product information** across all channels. This enables staff to provide timely fulfilment of orders without costly inventory management errors across the various channels. **Taking omni-channel a step further by creating customised shopping experiences.** • This includes **incorporating personalised customers' touchpoints by providing timely recommendations and nudges** based on purchasing history and preferences of the customer. • Offline retail stores can complement the shopping journey of an online consumer by providing tailored product knowledge to help consumers make informed purchases across sales channels.
Increased Focus on Customer Experience	**Physical stores continue to play an important role in enhancing the customer experience throughout the customer journey.** • Retail stores will **evolve into an information and entertainment hub for customers** to communicate with like-minded customers and seek for more information about products and services. • Retailers have been **investing in redesigning the in-store experience, such as introducing immersive technologies to support customers queries, creating social spaces such as cafes, workshops and events within their stores** to generate excitement and draw crowd in.	**Retail Operations not only provide sales transactions, but also deliver the brand narrative to the customer.** • Apart from managing sales transactions, roles in **Retail Operations will act as brand ambassadors, articulating and demonstrating the purpose and values of the brand**, providing personalised one-to-one assistance to customers. • Technology such as customer relationship management (CRM) systems and self-checkouts would enable retail operations staff to have time to understand customer needs as well as be more informed on topics such as customer preferences and purchasing history. **Retailers are striving towards personalised experiences targeted at individual customer segments.** • With an increased demand for customer-centricity and technology implemented, **retailers can gather insights on various customer touchpoints, to customise and adapt their service approach according to the target customer segments**. For instance, luxury retailers may focus on delivering highly personalised services, while fast moving consumer goods retailers could prioritise greater efficiency and self-service processes, meeting the expectations of the different segments.

Trends in Retail Operations

Key Impact	What are we seeing		The New Norm
Technology implementation beyond e-commerce	**Leveraging technology to uplift customer experience: In-store technology raises productivity and enables the efficient allocation of employees to perform tasks required, allowing employees to perform technology-enhanced store tasks, such as simplified monitoring of store inventory.** • Retailers are **seeking to combine process optimisations with real-time information or automation** to perform technology-enhanced store tasks. • Technology enhances processes across various touchpoints throughout the customer's journey. This **begins with customers interacting with brands via digital platforms such as social media, and virtual assistants** to resolve their queries on e-commerce platforms. Consumers are also supported with immersive technology that streamline their purchasing decisions, as well as simplify payment activities.		**Moving forward, retailers should embrace a culture of innovation and adopt an open stance towards technology in retaining customer loyalty and maintaining a competitive edge.** • Depending on a retailers' size, sophistication, and investment capacity, **organisations are expected to continue to incorporate end-to-end solutions** to improve their value proposition and customer experience. **As technology reshapes retail operations, tasks and skill requirements will change and retailers must rethink how work is done.** • While technology can enable greater efficiency in the workforce, critical tasks of the retail operations such as providing customer service and ensuring secure sales transactions remain integral to retail operations. **Retail operations' skills will evolve from performing simple transactional capabilities into providing high quality interactions and services that keep customers engaged**.

Hi! I am Georgina and I work as a **Sales Associate.**

At work, I guide customers in interacting with our in-store digital tools and support customers in their O2O2O journey by answering queries and providing personalised recommendations.

OVERVIEW OF IMPACT TO THE ROLE

Level of Impact

HIGH

Time Horizon

Immediate — Mid-term — Long-term

Key Trends driving Impact

- *Consumer of the Future*
- *New Retail Model*
- *Automation & Data*
- *Future-proofed Supply Chain*

⚠️ Highly Impacted Retail Archetypes

Supermarkets & Convenience Stores	Small and Medium Enterprises
Digital Player	Digital Leader

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology: Role will be supported by automation of repetitive and transactional retail processes.
	Complemented by Technology
Job Reconfiguration	**Job Enlargement**: Role will take on additional responsibility of managing **online-to-offline sales fulfilment.**
	Job Enrichment: Role will deepen emphasis on **customer experience** and **customer advisory.**

Skills to Grow

Product Advisory
From proficiency level 1 to 3

After-Sales Service
From proficiency level 1 to 2

Service Excellence
From proficiency level 1 to 3

New Skills Required

- Omni-channel Management
- Customer Experience Management
- In-store Digital Application and Assistance

Sales Associate will be expected to upskill in:

- **Product Advisory**: Convey product knowledge and identify opportunities for cross-selling and upselling of complementary products
- **After-sales service**: Monitor process of after-sales services including coordinating product returns or exchanges with respective departments
- **Service Excellence**: Respond to service opportunities and escalate service challenges independently.

*Skills and proficiency levels are identified based on Skills Framework for Retail

THE ROLE TODAY

This Sales Associate serves as the first point-of-contact in the store and is responsible for achieving sales, delivering service and operations excellence. This will include handling order fulfilment processes for customers in store to drive seamless customer experience across channels.

THE ROLE TOMORROW

The Sales Associate continues to act as the primary point-of-contact in physical retail stores, delivering service and operations excellence. With implementation of technology and transition towards omni-channel retailing, there is less reliance on the Sales Associate to perform transactional activities, and shifts focus to facilitate digital experiences and consultative customer support across online and offline sales channels.

Changes in critical work function

Critical Work Function	Key Drivers of Change	Implications on Tasks
Deliver Service Excellence	Embedding technology in retail operations to optimise service efficiency • **Automated checkout** and **fraud detection processes** (e.g. self-checkout kiosks, mobile scanning checkouts) implemented to provide a seamless experience for customers at stores. • **Individual product IDs and/or digital enabled barcodes** to trigger data-enabled replenishments or implementation of sales promotions. Attracting consumers with an immersive retail experience • **Augmented Reality/Virtual Reality** applications to enhance the customer experience	Augmented by Technology: • Repetitive and transactional retail processes and tasks will be handled by automation. The focus of the Sales Associate would be redirected to provide assistance to shoppers in need of guidance. Job Enrichment: • As technology continues to be integrated and embedded across multiple touchpoints, the Sales Associate would be responsible for facilitating the in-store experience, guiding customers' in usage of applications where necessary.

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Critical Work Function	Key Drivers of Change	Implications on Tasks
Achieve Sales	Empowering staff with access to technology and data to enhance customer service • **Real-time inventory and information management system** provide visibility and support staff to answer queries about products and services available. • **Customer data and analytics:** Retailers are equipping associates with tools armed with insights about existing customers and preferences, in order to better connect with shoppers	Job Enrichment: • With organisations emphasising on customer-centricity across the shopper's journey, the Sales Associate will be critical in enabling sales processes that incorporate technology and enhance the customer experience. • The Sales Associate will have to incorporate customer loyalty programme into the sales strategy approach towards new customers. • The Sales Associate has to drive sales through consultative selling, applying knowledge on current consumer trends identified by the retailer. • With existing customer data collected through the memberships, the Sales Associate will provide relevant product recommendations to existing customers based on purchasing history and current product interests.
Execute Customer Order Fulfilment	Rise of digital sales platform • Increased demand for **online-to-offline sales fulfilment**, e-commerce enable retailers to connect online shoppers with in-store associates and provide online and offline product listings.	Job Enlargement: • The Sales Associate is critical in **bridging the gaps between online and in-store channels**. The Sales Associate has to manage online and offline sales fulfilment to deliver a seamless omni-channel experience. • The Sales Associate has to manage the product availability across online and offline sales channels, answering queries from online sales channels.

SALES ASSOCIATE

A closer look at how tasks would be impacted:

Critical Work Function	Existing task...	...Envisioning the new tasks
Deliver Service Excellence	Implement operations for service excellence over multiple customer touch points	• Troubleshoot issues and assist consumers as they interact and face difficulties with in-store applications and technology. • Perform maintenance checks on in-store technology and applications, escalating issues when necessary.
Achieve Sales	Facilitate customer interactions to sell products & services	• Gather insights through interactions with customers to understand personalised needs and desires. • Record and store relevant consumer data on customer-relationship management (CRM) systems, to better understand customers' demands. • Utilise in-depth product knowledge and CRM data to provide product recommendations based on customers' demands, delivering a personalised shopping experience for the customers.
	[New task]	• Communicate with customers via text on third-party sales platforms and social media, providing more frequent customer touchpoints to drive increase in sales volume.
	Manage after-retail sales services and provide information and advice on inquiries with regard to the products and services	• Provide after-retail sales assistance to customers and resolving any issues. • Record customers' feedback and after-retail sales service requests on CRM systems • Provide analysis of customers' feedback & suggestions to enhance after-retail services.
	Document sales transactions	• Monitor sales transaction processes and activities on sales monitoring platforms. • Reviewing sales performance data to refine sales activities to improve sales
Execute Customer Order Fulfilment	Handle fulfilment of customers' orders across store pick or delivery service	• Handle fulfilment of customers' orders across all relevant platforms, including online-to-offline fulfilment activities.

Upskilling of existing skills

- Customer Relationship Management Operations
- After-sales service
- Product Advisory
- Service Excellence
- Service Leadership

New skills for the role

- Customer Experience Management
- Data Analytics
- Robotics and Automation Application
- In-store Digital Application and Assistance^
- Omni-channel Management^

^Skills not in any Skills Framework

Hi! I am Tina and I work as a **Sales Supervisor.**

I monitor sales transactions and inventory within my store, and empower sales associates with relevant sales strategies based on insights on specific customer purchasing behaviours.

OVERVIEW OF IMPACT TO THE ROLE

Level of Impact

HIGH

Time Horizon

Immediate | Mid-term | Long-term

Key Trends driving Impact

- *Consumer of the Future*
- *New Retail Model*
- *Automation & Data*
- *Future-proofed Supply Chain*

⚠️ Highly Impacted Retail Archetypes

Supermarkets & Convenience Stores	Small and Medium Enterprises
Digital Player	Digital Leader

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology
	Complemented by Technology: Technology improves the efficiency of repetitive and transactional retail processes within the role.
Job Reconfiguration	**Job Enlargement**: Role will take on **additional responsibilities of data analytics and digital implementation** activities.
	Job Enrichment: Role will focus on enhancing the overall customer experience, integrating sales processes across **online and offline channels.**

Skills to Grow

Data Analytics
From proficiency level 2 to 3

Customer Relationship Management Operations
From proficiency level 2 to 3

Product Styling
Proficiency level 2
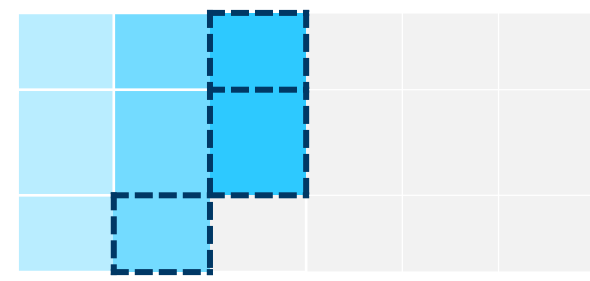
New Skills Required

- Omni-channel Management
- Robotics and Automation Application
- In-store Digital Application and Assistance

Sales Supervisor will be expected to upskill in:

- **Data Analytics**: Understand and apply basic data analytics to determine customer purchasing patterns
- **Customer Relationship Management Operations**: Analyse customer and sales data available and recommend improvements in sales processes to strengthen business relationships with customers

While the skill level remains, the Sales Supervisor will be increasingly expected to apply these skills in their role:

- **Product Styling:** The Sales Supervisor needs to design and implement store layouts to illustrate product styles based on customer feedback and data.

*Skills and proficiency levels are identified based on Skills Framework for Retail

THE ROLE TODAY

The Sales Supervisor is accountable for achieving assigned team sales targets and conduct supervisory duties that involve the coordination of activities to ensure that operational demands are catered for. The role also oversees daily store operations, leads merchandising activities to optimise sales performance and is expected to deal with multiple parties in the workplace, such as colleagues and external customers, as part of managing in-store operations.

THE ROLE TOMORROW

The Sales Supervisor will expand to analyse and develop sales strategies to achieve optimum sales target. This includes analysing sales channel performance, competitor landscape and customer demand to identify sales opportunities. With emerging technologies such as AI and mobile applications, the Sales Supervisor will need to be digitally-savvy and guide staff to adopt technology implemented. He/she will need to evaluate the feasibility of integrating technologies into sales strategies.

Changes in critical work function

Critical Work Function	Key Drivers of Change	Implications on Tasks
Deliver Service Excellence **Deliver Operations Excellence**	Empowering staff with knowledge on analysing data to enhance operational processes • **Real-time inventory and information management system** provide visibility and support for staff to provide greater efficiency in responding to products and services queries.	Complemented by Technology: • The Sales Supervisor is critical in driving technology-enabled customer experience, **guiding the implementation of technology to provide effective customer-centric sales and operations strategies.** • As technology continues to be embedded across multiple customer touchpoints, the Sales Supervisor would be responsible for **tracking key customer metrics (e.g. interactions with digital displays)** to ensure a customer-centric retail experience.

Critical Work Function	Key Drivers of Change	Implications on Tasks
Engage in Innovation and Productivity Initiatives	Embedding technology in retail operations to optimise service efficiency • **Automated checkout** and **fraud detection processes** (e.g. self-checkout kiosks, mobile scanning checkouts) are implemented to provide a seamless experience for customers at stores. • **Individual product IDs and/or digital enabled barcodes** to trigger data-enabled replenishments or implementation of sales promotions. • **Customer data and analytics:** Retailers are equipping associates with tools armed with insights about existing customers and preferences, in order to better connect with shoppers Attracting consumers with an immersive retail experience • **Augmented Reality/Virtual Reality** applications to enhance the customer experience	Job Enlargement: • The Sales Supervisor has to **conduct basic data analysis on key customer experience metrics** (e.g. customer feedback, inventory replenishment rate), and identify solutions that will **improve the overall customer experience**. • The Sales Supervisor will continue to **stay updated on the latest technology available and identify areas for improvement** for the store to remain relevant and productive.
Manage Customer Order Fulfilment	Rise of digital sales platforms • Increased demand for **online-to-offline sales fulfilment**, e-commerce enable retailers to connect online shoppers with in-store associates and provide online and offline product listings.	Job Enrichment: • The Sales Supervisor will be essential in spearheading the **integration of digital and offline sales channels**. This **creates a channel-agnostic culture where customer experience is the top priority** across all functions and channels. The Sales Supervisor supports staff in handling online and offline fulfilment activities.

A closer look at how tasks would be impacted:

Critical Work Function	Existing task...	...Envisioning the new tasks
Deliver Service Excellence	Manage operations for service excellence	• Implement inventory analytics tools to forecast and maintain inventory operations • Support the integration of technologies between the business systems of suppliers and partners to manage purchasing, stockholdings and distribution efficiencies
Deliver Operations Excellence	Supervise retail operations	
Engage in Innovation and Productivity Initiatives	Generate ideas and support the implementation of productivity and innovation initiatives	• Implement sales monitoring software (e.g. point-of-sales systems) and processes • Measure the effectiveness of sales strategies, customer experience and customer acquisition programmes by leveraging on data analytic tools/software, and propose changes in sales strategies across both online and offline channels • Review sales, customer and purchasing behaviour data, and identify performance insights that formulate new sales initiatives
Manage Customer Order Fulfilment	Handle fulfilment of customers' orders across store pick or delivery service	• Monitor & handle fulfilment of customers' orders across all relevant platforms, including digital or in-store sales, as well as multi-modal fulfilment activities (e.g. online-to-offline fulfilment, subscription services).

Upskilling of existing skills

- Data Analytics
- Customer Relationship Management Operations
- Product Styling

New skills for the role

- Robotics and Automation Application
- In-store Digital Application and Assistance^
- Omni-channel Management^

^Skills not in any Skills Framework

The Sales Supervisor role could potentially merge with the Store Manager, to drive greater efficiency and reduce overlapping tasks (e.g. managing sales, operational and people activities)

Hi! I am Jane and I work as a **Store Manager.**

At work, I oversee the effectiveness of new sales channels on the stores managed, developing and revising sales strategies to keep customers engaged seamlessly across stores.

OVERVIEW OF IMPACT TO THE ROLE

Level of Impact

MEDIUM

Time Horizon

Immediate   Mid-term   Long-term

Key Trends driving Impact

Consumer of the Future | New Retail Model | Automation & Data | Future-proofed Supply Chain

⚠️ Highly Impacted Retail Archetypes

Supermarkets & Convenience Stores	Small and Medium Enterprises
Digital Player	Digital Leader

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology: Role will take on data-driven approach to evaluate changing demands of consumers and employees.
	Complemented by Technology
Job Reconfiguration	**Job Enlargement**: Role will take on additional responsibilities of coordinating with relevant teams to **evaluate online and offline sales fulfilment processes.**
	Job Enrichment

Skills to Grow

Data Analytics
From proficiency level 3 to 4

Customer Relationship Management Operations
From proficiency level 3 to 4

Process Improvement
From proficiency level 3 to 4
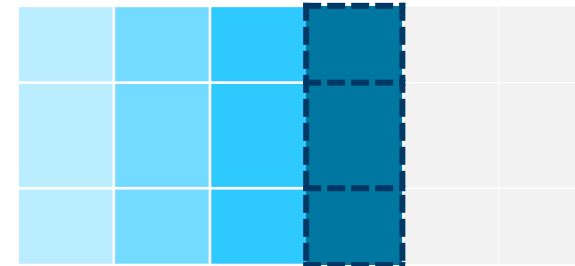
New Skills Required

- Omni-channel Strategy
- Merchandise Performance Analysis
- Business Performance Management

Store Manager will be expected to upskill in:

- **Data Analytics**: Understand and apply advanced data analytics to determine customer purchasing patterns
- **Customer Relationship Management Operations**: Recommend improvements in sales processes to strengthen business relationships with customers
- **Process Improvement:** Develop in-depth knowledge of retail sales activities, and implements changes in processes to drive positive customer experience.

*Skills and proficiency levels are identified based on Skills Framework for Retail

THE ROLE TODAY

Today, this job role oversees the end-to-end operations of a store, being responsible for driving the store's sales performance and service performance, and engaging in innovation and productivity initiatives for the store. The job drives seamless customer experience across channels, overseeing the order fulfilment processes for customers in store. Overall, the job role takes on the responsibility of cascading and operationalising headquarters' directives to the store.

THE ROLE TOMORROW

The Store Manager role will continue to oversee end-to-end operations of a store, as well as manage direct-to-consumer sales interactions. He/she would manage various sales channels including: online, click from store and distant sales, improving the operational efficiency of the various platforms. He/she is responsible for the upskilling of retail operations staff, to allow them to adapt to changing store operations and optimise in-store labour productivity.

Changes in critical work function

Critical Work Function	Key Drivers of Change	Implications on Tasks
Deliver Service Excellence	Embedding technology in retail operations to optimise service efficiency • **Automated checkout** and **fraud detection processes** (e.g. self-checkout kiosks, mobile scanning checkouts) implemented to provide a seamless and efficient experience for customers at stores. • **Individual product IDs and/or digital enabled barcodes** to trigger data-enabled replenishments or implementation of sales promotions.	Augmented by Technology: • The Store Manager has to take a data-driven approach to **evaluate the needs of various stakeholders**. The Store Manager will need to review key metrics (e.g. sales volume, customer satisfaction) collected through the digital touchpoints, and **identify issues to optimise and meet the changing demands of employees and customers**.

Critical Work Function	Key Drivers of Change	Implications on Tasks
Deliver Operations Excellence	Rise of omni-channel sales platforms • **Real-time inventory and information management system** to provide visibility and support staff with real-time information to answer queries surrounding products • Increased demand for greater convenience in customer purchasing journey, such as click-and-collect and delivery options.	Job Enlargement • The Store Manager needs to **understand the operations of omni-channel POS systems**, and **develop basic troubleshooting skills** to ensure daily operations run smoothly. • The Store Manager coordinates across relevant teams (e.g. Logistics, E-commerce) to discuss and evaluate online and offline sales fulfilment processes (e.g. purchasing & returns), to ensure products are constantly available and customers are satisfied with the services provided.
Achieve Sales	Empowering staff with product knowledge and data to enhance customer service • **Customer data and analytics:** Retailers are equipping associates with tools armed with insights about existing customers and preferences, in order to better connect with shoppers	Job Enlargement: • Store managers are expected to be equipped with the knowledge to manage queries, **supporting staff to help engage their customers and provide thoughtful recommendations**.

Mercer

A closer look at how tasks would be impacted:

Critical Work Function	Existing task…	…Envisioning the new tasks
Deliver Operations Excellence	Define and allocate staff duties in accordance with operational requirements	• Identify specific sales volume drivers that support workforce-management practices, ensuring staff are sufficiently engaged at work to provide prompt sales assistance. • Collaborate with Sales Supervisor to identify and develop training opportunities for staff to learn about new sales strategies and product knowledge.
	Manage and maintain store facilities	• Monitor & handle fulfilment of customers' orders across all relevant platforms, including online-to-offline fulfilment activities.
Deliver Service Excellence	Manage service brand	• Review service staff and technology implemented provide interconnected sales touchpoints, streamlined end-to-end processes, and maintain service standards to meet customer demands. • Build and nurture a strong relationship with loyal customers through knowledge sharing, positive attitude, and excellent customer service
	Manage in-store service performance	
	Establish rapport and cultivate relationship with customers	
Achieve Sales	Facilitate implementation of organisation strategies	• Research and review the relevance of new store concepts and technology available • Train retail operations staff to adopt new technology and sales channels • Integrate and streamline online-to-offline fulfilment processes to enable staff to process purchases and returns • Meet sales targets by understanding customers' needs, providing expert knowledge in brand categories

Upskilling of existing skills

- Data Analytics
- Customer Relationship Management Operations
- Process Improvement
- Product Styling

New skills for the role

- Business Performance Management
- Merchandise Performance Analysis
- Robotics and Automation Application
- In-store Digital Application and Assistance^
- Omni-channel Management^
- Omni-channel Strategy^

^Skills not in any Skills Framework

Hi! I am Sam and I work as a **Retail Operations Director.**

I work with Store Managers to design customer-centric retail initiatives that complement the overall sales process across channels, as well as ensure all staff are engaged and motivated to work in the organisation.

OVERVIEW OF IMPACT TO THE ROLE

Level of Impact

MEDIUM

Time Horizon

Immediate | Mid-term | Long-term

Key Trends driving Impact

- *Consumer of the Future*
- *New Retail Model*
- *Automation & Data*
- *Future-proofed Supply Chain*

⚠️ Highly Impacted Retail Archetypes

Supermarkets & Convenience Stores	**Small and Medium Enterprises**
Digital Player	**Digital Leader**

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology: Role will drive the business to redefine retail operations and develop a customer-centric, digitally innovative retail store approach and roadmap
	Complemented by Technology
Job Reconfiguration	**Job Enlargement**: Role will focus on managing processes and workforce available, designing agile talent practices to ensure a reliable and competent workforce to deliver service to the customers.
	Job Enrichment

Skills to Grow

People Development
Proficiency level 5

Process Improvement
Proficiency level 5

New Skills Required

- Omni-channel Strategy
- Omni-channel Management
- Data Analytics

While the skill level remains, the Retail Operations Director will be increasingly expected to apply these skills in their role:

- **People Development:** Assessing store performances and establish directions for business performance strategic needs. This includes evaluating staff capabilities and identify training needs to support knowledge acquisition.
- **Process Improvement:** Understanding operations and activities across all sales platform to develop a seamless omni-channel experience. Retail Operations Director needs to facilitate the digital change management processes in order to encourage adoption and address resistance to change

Skills and proficiency levels are identified based on Skills Framework for Retail

THE ROLE TODAY

This job role drives the realisation of the business strategies by developing business opportunities, fostering relationships with stakeholders and establishing operations and service excellence standards. He/she is also responsible for driving the organisation's innovation and productivity aspirations through an understanding of customers' preferences, operational activities and industry landscape to enhance sales performance, operations and service levels.

THE ROLE TOMORROW

The Retail Operations Director will continue to play an important role in managing retail operations and optimising performance of retail stores. In addition, this role will serve to be critical in enhancing the omni-channel and in-store experience for their customers, uncovering and driving retail store innovations and initiatives for the organisation, as well as creating a customer-centric culture among retail stores and staff. With the talent landscape being increasingly competitive, this role will need to focus on driving talent management initiatives for retail employees to build highly motivated teams and optimise talent retention.

Changes in critical work function

Critical Work Function	Key Drivers of Change	Implications on tasks
[New] Drive Omni-channel Strategy	<u>Rise in digital sales platforms</u> Emphasise on delivering a unified omni-channel experience (e.g. endless aisle) across various sales channel. The **increased availability of consumer data allow greater targeting of customer segments and drive strategy** to increase sales across physical and online stores.	Job enlargement: • The Retail Operations Director has to design and **evaluate effectiveness of e-commerce fulfilment activities that can be incorporated into existing in-store operations**. The Retail Operations Director will have to collaborate and coordinate across relevant teams (i.e. Logistics, Digital, E-Commerce) to understand and drive an efficient omni-channel strategy.

Critical Work Function	Key Drivers of Change	Implications on Tasks
Driving Service Excellence	<u>Leveraging technology to truly enhance consumer experience</u> **Technology has been incorporated across various touchpoints**, with examples including automated transactional activities, personalised shopping experiences through customer data and implementing innovative technology to drive experiential retail.	<u>Augmented by Technology:</u> • With a deep understanding of current and future customers' expectations based on data-backed insights, the **Retail Operations Director is critical in driving the organisation to redefine retail operations and develop a customer-centric, digitally innovative** retail store approach and roadmap. • The Retail Operations Director will continue to **evaluate and incorporate end-to-end solutions to improve their value proposition and customer experience**, keeping up to date with retail trends and best practices.
Drive Innovation and Productivity Aspirations	<u>In-store technology to raise productivity and drive change for employees through task mix, and operating and labour models</u> **Combining process optimisation with real-time information or automation** to perform technology-enhanced store tasks.	
Manage Teams	<u>Importance of organisational and workforce agility as retailers face changing expectations and preferences</u> Effects from the global pandemic has highlighted the **importance of having retailers and its workforce stay agile and flexible** in order to successfully drive growth now and into the future.	<u>Job Enlargement:</u> • The Retail Operations Director has to **cultivate talent practices that drive staff's loyalty**, attracting and retaining staff to develop a competent workforce. • There is also a need to cultivate an **agile and digital-fluent retail workforce** with diverse skill-sets to drive the organisation and workforce in adapting to changing expectations. This will entail **supporting staff to learn and upskill** to remain relevant and adapt to new ways of working in the future. • The Retail Operations Director will need to **establish fluid structures and processes** in order to encourage mobility and agility across teams to fulfil manpower shortages, such as transferring retail staff into other departments such as e-commerce and supply chain.

A closer look at how tasks would be impacted:

Critical Work Function	Existing task...	...Envisioning the new tasks
[New] Drive Omni-channel Strategy	[New task]	• Collaborate across relevant teams (e.g. e-commerce) to align on the organisation's omni-channel strategy, including long-term vision and current state • Evaluate existing capabilities and identify investments or additional capabilities required to advance omni-channel initiatives and activities across in-store operations • Coordinate with teams to establish cross-channel connections and functions to support omni-channel activities, such as the ability to execute online-to-offline order fulfilment • Establish and communicate processes and protocols to in-store staff to effectively drive omni-channel activities across in-store operations
Deliver Service Excellence	Strategise service operations	• Develop unique customer experience journey and engagements across various touchpoints in alignment with evolving shopper expectations and omni-channel strategy. • Revise retail operations practices / SOPs to account for different customer profiles based on customer insights
	Drive service quality and customer satisfaction	• Assess in-store service quality using relevant indicators and identify areas of opportunities to better guide/support the Store Managers in enhancing service quality
Drive Innovation and Productivity Aspirations	Innovate customer experience	• Collaborate across departments to formulate and develop group-wide initiatives • Lead change management activities for retail operations staff when implementing new projects or initiatives • Identify and implement effective practices in retail operations (e.g., use of AR/VR, retail analytics) to elevate customer in-store experience • Identify key metrics and relevant data to be collected with regards to implementation of new technology
Manage Teams	Develop organisational talent capability	• Develop career development and management plans with a view to cultivate a culture of continuous learning and upskilling across employees • Organise targeted training programmes or cross-functional learning initiatives to suit specific store or employee segment needs depending on differentiated store demands (e.g. coaching and mentoring based on real-time sales data available)

Upskilling of existing skills

• Process Improvement
• Business Performance Management
• Staff Training Facilitation
• People Development

New skills for the role

• UI/UX Optimisation
• Customer Experience Management
• Data Analytics
• Omni-channel Management^
• Omni-channel Strategy^
• Transdisciplinary Thinking*
• Creative Thinking*
• Collaboration*

*Critical Core Skills
^Skills not in any Skills Framework

E-commerce

► E-commerce Executive
► E-commerce Manager

Pivotal Roles In Focus

E-commerce Executive
Medium Impact

E-commerce Manager
Medium Impact

E-commerce of Today

- The availability of e-commerce teams is highly dependent on talent availability and service demand, which determine how e-commerce services are implemented within the business.

- E-commerce operations are highly diverse today, with segments of the operations being distributed across multiple functions such as marketing and retail operations.

- E-commerce teams have developed capabilities to fulfil online sales orders, working with supply chain and logistics teams to deliver orders to customers directly.

The Future of Jobs in E-commerce

1

Shifting consumer patterns & types of e-commerce emerge

The introduction of **third-party e-commerce platforms, quick-commerce (q-commerce) and individual brand websites** have driven up the demand for improved e-commerce shopping experiences. E-commerce job roles need to identify effective e-commerce sales strategies that align with the brand image and target consumer preferences, and develop processes that provide convenience and accessibility for customers to make purchases seamlessly.

2 Based on the extent of e-commerce capabilities developed, retailers can evolve into various e-commerce organisation structures:

Specialised suite of **e-commerce roles**

Retailers that prioritise investing and scaling up the digital storefront would **require a suite of in-house roles specialised in e-commerce activities** (e.g. e-commerce developer, community builder, UX designer, SEO content writer). The retailers will have complete autonomy over the sales processes and content presented on the e-commerce platforms.

Multi-dimensional job roles

Retailers can provide job roles with career progression opportunities, **embedding e-commerce roles into other job functions (e.g. marketing, retail operations), structuring the tasks as additional overlapping activities that drive e-commerce sales.** This enables the retailer to have some autonomy over the e-commerce operations, while managing talent available and providing progression opportunities in the organisation.

External e-commerce support & operations

Retailers form partnerships between internal e-commerce team and external e-commerce agencies. The **external agencies can support the development of retailers' e-commerce capabilities**, while maintaining autonomy of the brand image and their competitive advantage in the sector.

Trends in E-commerce

Key Impact	What Are We Seeing	The New Norm
The exponential growth of e-commerce	**Businesses transitioned online during the COVID-19 pandemic, and the global trend rapidly shifted towards e-commerce. However, this has been followed by a normalisation in steady growth as physical stores re-opened.** • Retailers who seek to become the next e-commerce powerhouse are investing in strategies and technological capabilities to continue winning digital consumers through consumer engagement, platform user interface and brand offerings.	**There will continue to be demand for existing and new e-commerce roles as retailers work towards creating a niche for themselves in the digital marketplace. Retailers will be exploring and assessing the possibilities of out-sourcing or expanding specific in-house e-commerce roles depending on its criticality and types of required skills.** • **Strengthening infrastructure to support increased demand for online retail:** Retailers are also gearing up for roles to drive development of digital infrastructure (i.e. Cybersecurity/Network operations). • **Strengthening consumers' digital experience:** There is an increased demand for both multi-dimensional tech-enabled roles (i.e. e-commerce marketer, UI/UX developers) and tech-heavy roles (web designers, VR/AI experts), to incorporate data and technology to create a compelling digital customer experience.
Multi-channels to Omni-channel	**Organisations have begun to leverage both physical and digital channels in unison to create a unified customer experience.** • **Omni-channel retailing and serving customers via an unified and convenient experience** became an integral function for many retailers during the pandemic.	**Retailers will continue to equip both in-store and online operations with capabilities to support seamless purchasing and experiences.** • Retail processes need to enable **cross-function collaboration between e-commerce and retail operations**, in order to ensure easier access to customer and/or product information across all channels and provide the right recommendations. **Taking omni-channel a step further by creating custom shopping experiences**. • This includes **incorporating personalised customers' touchpoints by providing recommendations and nudges** based on purchasing history and preferences. • As customers visit both the online and offline stores, retailers can analyse data from online interactions and provide insightful suggestions to customers through their online purchases, product ratings and browsing behaviour, seamlessly transitioning between online and offline retail. • Online queries and comments from the consumers can also be provided to offline retail staff, helping staff provide customised support to the consumers without repeated interactions.

Trends in E-commerce

Key Impact	What Are We Seeing	⟫⟫⟫	The New Norm
Commercial opportunities across social platforms	**There is a congregation of e-commerce activities in the social space, from brand marketing to customer service to shoppable advertising.** • Diverse social platforms with **rapidly evolving features are presenting new ways to imagine customer engagements**. Retailers are exploring social-first approaches like behind-the-scenes livestreams, video consultations, and personalised product recommendations. • **Advertising** has been reimagined to **include options to purchase products directly** on advertisements, further reducing friction in the customer journey. **The emergence of social commerce has created opportunities for businesses to gain control of their brands on digital channels.** • **Consumers are seeking peer reviews from fellow consumers and recommendations from influencers** across social media platforms and peer review sites. Retailers can leverage on social commerce to promote the unique customer experience consistently across social media influencers and consumers interacting with the stores. • **Social commerce gives rise to opportunities for retailers to manage brand equity directly**, developing a direct-to-consumer strategy and model that owns the customer experience and relationship.		**Growth areas in the e-commerce space will include development and integration of e-commerce activities into social platforms.** • Retailers are **expected to increase their investment in social commerce** moving forward, focusing on fusion between commerce, social and entertainment • Capabilities and responsibilities required in e-commerce job roles will extend towards various social platforms, with the aim to design a social commerce experience and storefront that converts traffic to customers. **Through social commerce, retailers will continue to build brand equity and engagement that is lacking in most online marketplaces.** • Cross-function collaboration between e-commerce roles and customer-facing retail functions will be crucial. **E-commerce job roles could evolve into all-encompassing roles that manage brand equity and customer engagement** across digital marketplace and sales platforms.

Trends in E-commerce

Key Impact	What Are We Seeing	The New Norm
Opportunities for overseas expansion	**The emergence of extensive online store solutions and globally operating fulfilment centres have simplified cross-border transactions.** • The proliferation of e-commerce sites and marketplaces have **enabled retailers to break into international markets with low cost and extensive reach** to customers from various locations. • On the flip slide, **e-commerce could also be a double-edged sword for local retailers** as international retailers are similarly leveraging e-commerce platforms to enter and compete for local market share.	**Greater opportunities for retailers to tap into larger markets and sell products internationally.** • **E-commerce capabilities would be enhanced as infrastructure is established** to meet the demand for increased customer fulfilment across international markets. • However, the accessibility of e-commerce provides consumers a greater variety of products. **Local retailers will face strong demand to innovate and expand their e-commerce capabilities**, or risk losing its competitive advantage to emerging, international brands.

Mercer

Hi! I am Kate and I work as an **E-commerce Executive.**

At work, I keep updated on the latest sales trends, and monitor customer demographics and satisfaction levels. I would also review and ensure the sales processes remain effective and engaging for the customers (e.g. FAQ effectiveness, customer online support).

OVERVIEW OF IMPACT TO THE ROLE

Level of Impact

MEDIUM

Time Horizon

Immediate   Mid-term   Long-term

Key Trends driving Impact

- *Consumer of the Future*
- *New Retail Model*
- *Automation & Data*
- *Future-proofed Supply Chain*

⚠️ Highly Impacted Retail Archetypes

Department Stores	Fashion & Sporting Goods
Small and Medium Enterprises	***Note: level of digital maturity will also play a key role**

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology: Role will be supported by automation of repetitive and transactional retail processes.
	Complemented by Technology
Job Reconfiguration	**Job Enlargement:** Role will take on additional responsibility of managing **online-to-offline sales fulfilment.**
	Job Enrichment: Role will deepen emphasis on **customer experience** and **customer advisory.**

Skills to Grow

Data Analytics
From proficiency level 3 to 4

Business Performance Management
From proficiency level 3 to 4

New Skills Required

- Customer Experience Management
- Omni-channel Management

E-commerce Executive will be expected to upskill in:

- **Data Analytics & Business Performance Management**: Understand the application of data analytics tools, and apply the business performance knowledge to analyse and interpret consumer data across different sales channels, to review business outcomes on the effectiveness of e-commerce business operational plans.

Skills and proficiency levels are identified based on Skills Framework for Retail

THE ROLE TODAY

The E-Commerce Executive contributes to the growth of the e-commerce business by enhancing the customer experience, executing customer order fulfilment and maintaining the technology and infrastructure. He/she is also responsible for performing data analysis to generate data-driven commercial insights and managing relationships with partners.

THE ROLE TOMORROW

As retailers invest in improving e-commerce strategies and activities, the E-commerce Executive will focus on meeting the demand from online customers and ensuring smooth online transactions. There is a greater emphasis for the E-commerce Executive to understand the different types of e-commerce solutions (e.g. q-commerce, third-party e-commerce, personal website).

The E-commerce Executive will analyse the types of consumer behaviours, and implement relevant e-commerce solutions that could influence the online and offline customer experience. Lastly, the E-commerce Executive will have to work with retail operations and logistics departments to implement appropriate fulfilment activities that align with target consumer behaviours (e.g. click-and-collect, last mile delivery, after-sales services).

Changes in critical work function

Critical Work Function	Key Drivers of Change	Implications on Tasks
Enhancing E-commerce Customer Experience	There is greater emphasis on informed customer centricity and engagement • **Data-driven e-commerce:** Consumer data collected from interactions with online sales platforms are leveraged to inform the development of personalised touchpoints.	Augmented by Technology: • With organisations emphasising on customer-centricity across the shopper's journey, the **E-commerce Executive is critical in analysing data gathered from consumers via technology implemented**, to inform decision making across all aspects of the e-commerce. • The E-commerce Executive have to **review insights from customer behaviour data and implement appropriate improvement plans**, such as identifying the user interface choices during the website design process, developing conversion rate optimisation campaigns, or offering personalised product recommendations.

Critical Work Function	Key Drivers of Change	Implications on Tasks
Drive E-commerce Business Growth	Innovative experiences and efficient fulfilment processes attract and increases e-commerce sales • **Artificial intelligence and machine learning enhance product compatibility,** using consumer behaviour data (e.g. search queries, viewing history, past purchases) to determine products recommended to consumers. • **Virtual product offerings reduce decision fatigue:** Digital product offerings provide customers realistic visualisations (e.g. augmented reality, 3D rendering), based on customer sizes or demands, reducing decision fatigue as they browse online.	Job Enrichment: • The E-commerce Executive has to **keep updated with the latest trends and compatibility with the products and services offered**, understanding the implications on customer experience when implementing these solutions. • The E-commerce Executive continues to **leverage insights from consumer data analytics** to determine relevant experiences that are suitable for the target consumer segments.

Mercer

Critical Work Function	Key Drivers of Change	Implications on Tasks
Execute Customer Order Fulfilment	Embedding e-commerce automation and analytics to optimise efficiency • As business and fulfilment orders scale, **automation will be introduced to reduce manual workflows** to streamline costs and enhance the customer experience in delivery fulfilment (e.g. automated email notifications, e-commerce platform integration, return management software). • **Retailers are facing higher product return rates in e-commerce sales** as compared to offline sales channels. Retailers need to understand reasons consumers return products after the purchase, and identify customer or product segments that raise product return issues.	Augmented by Technology: • Repetitive tasks could be eliminated by automation to increase efficiency, and the E-commerce Executive will **transition towards monitoring the automated processes and provide troubleshooting assistance**. Technology and automation will support the E-commerce Executive in reducing errors in the fulfilment process. Job Enlargement: • The E-commerce Executive is required to **coordinate across relevant teams** to review and implement an integrated online and offline fulfilment process. The E-commerce Executive has to **collaborate with E-commerce, Retail Operations and Logistics to support the integration of inventory systems, sales processes and payment solutions** to help streamline the fulfilment process for both the staff and its customers. • The E-commerce Executive has to **conduct analytics on the types of return rates across product categories and consumer profiles**. This would help E-commerce Executive plan and design the e-commerce platforms and purchasing processes, in order to reduce the volume of products being returned and mitigate business costs from the returns.

A closer look at how tasks would be impacted:

Critical Work Function	Existing task...	...Envisioning the new tasks
Enhance E-Commerce Customer Experience	Manage service quality and customer satisfaction Manage operations for service excellence	• Analyse metrics such as 'click-through rates' and 'abandonment' to derive personalised insights across customer segments that enhance the customer experience (e.g. targeted product recommendations, ideal website design). • Recommend adjustments or key focus areas to existing customer engagement strategies based on understanding of customer segments. • Collaborate across departments (e.g. retail operations) and external e-commerce partners to obtain feedback across all digital touchpoints and identify areas of improvements to improve customer satisfaction.
Drive E-commerce Business Growth	[New Task] Identify strategic business partnerships Implement e-commerce activities	• Monitor latest e-commerce trends and technology available that can support improvement plans for existing sales processes. • Implement e-commerce fulfilment activities across new or existing digital touchpoints (e.g. automated email notifications, return management software). • Implement artificial intelligence and machine learning software to provide predictive analysis of customer purchasing behaviour, and real-time inventory management update. • Coordinating across retail operations, internal and third-party e-commerce sales platforms to ensure product availability to drive sales across the various channels.
Execute Customer Order Fulfilment	Coordinate order processing, delivery and returns of customer orders Monitor fulfilment of customers' orders via store pickup or delivery service	• Monitor automated activities across end-to-end fulfilment, highlighting anomalies in order fulfilment processes. • Collaborate with retail operations teams to drive online-to-offline fulfilment activities (e.g. click-and-collect, deliveries). • Analyse customer behaviour patterns to identify types of customer and product segments that are returning products. • Implement fulfilment and returns processes that support the customers' purchasing journey, reducing the risks associated with customer returns.

Upskilling of existing skills

- Data Analytics
- Business Performance Management

New skills for the role

- Customer Experience Management
- Omni-channel Management^
- Transdisciplinary thinking*
- Digital Fluency*
- Customer Orientation*

*Critical Core Skills
^Skills not in any Skills Framework

E-COMMERCE MANAGER

Hi! I am Jen and I work as an **E-commerce Manager.**

I receive real-time analytics reports on customer satisfaction and fulfilment processes, and review current implementations. I work closely with Retail Operations and Logistics teams to establish omni-channel processes that integrate online and offline sales fulfilment.

OVERVIEW OF IMPACT TO THE ROLE

Level of Impact

MEDIUM

Time Horizon

Immediate   Mid-term   Long-term

Key Trends driving Impact

- *Consumer of the Future*
- *New Retail Model*
- *Automation & Data*
- *Future-proofed Supply Chain*

⚠ Highly Impacted Retail Archetypes

Department Stores	Fashion & Sporting Goods
Small and Medium Enterprises	*Note: level of digital maturity will also play a key role*

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology: Role will be supported by automation of repetitive and transactional retail processes.
	Complemented by Technology
Job Reconfiguration	**Job Enlargement**: Role will take on additional responsibility of managing **online-to-offline sales fulfilment.**
	Job Enrichment: Role will deepen emphasis on **customer experience** and **customer advisory.**

Skills to Grow

Business Performance Management
From Proficiency level 4 to 5

Business Opportunities Development
Proficiency level 4

UI/UX Optimisation
Proficiency level 4
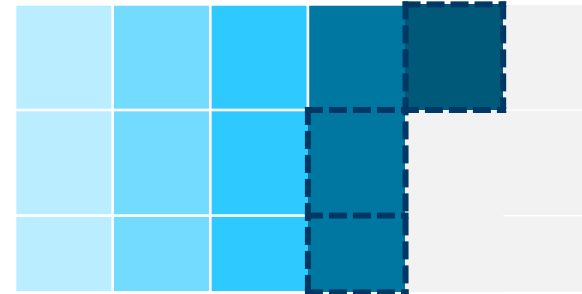
New Skills Required

- Omni-channel Management
- Omni-channel Strategy
- Category Management

E-commerce Manager will be expected to upskill in:

- **Business Performance Management:** Determine key performance indicators and evaluate results to implement improvement plans.

While the skill level remains, the E-commerce Manager will be increasingly expected to apply these skills in their role:

- **Business Opportunities Development**: Evaluate and analyse emerging local and international business opportunities to increase the e-commerce capabilities to create value to customers.

- **UI/UX Optimisation**: Incorporate consistent design principles into customer experience-led interface and visual assets to allow for a seamless retail experience that boost customer retention and conversion

Skills and proficiency levels are identified based on Skills Framework for Retail

E-COMMERCE MANAGER

THE ROLE TODAY

Today, this job role drives the growth of the e-commerce business by enhancing customer experience and managing customer order fulfilment, technology and infrastructural plans. He/she is also responsible for generating data-driven commercial insights and managing relationships with partners for the business.

THE ROLE TOMORROW

In the long-term, the E-commerce Manager will be increasingly critical to manage the digital ecosystem of activities as e-commerce scale. He/she will have to generate real-time analytics on customer experience and fulfilment, actively identifying issues and potential improvements. He/she will also lead cross-department collaboration in order to effectively to deliver an omni-channel experience for customers across all sales channels.

Changes in critical work function

Critical Work Function	Key Drivers of Change	Implications on Tasks
Drive Technology and Infrastructure Enablement	The need for continuous improvement of digital capabilities and infrastructure: As retailers scale e-commerce sales, developing **digital capabilities and infrastructure will continue to be at the forefront** as they look to further optimise efficiency or enhance the customer experience across digital touchpoints: • Transitioning from 'traditional' e-commerce infrastructure to headless commerce in order to allow quick responses to consumers' needs • Integrating multiple mobile payment solutions for seamless online sales checkout • Artificial intelligence and machine learning to enhance product compatibility, using consumer behaviour data (e.g. search queries, viewing history, past purchases) to determine products recommended to consumers. • Digital product offerings provide customers realistic visualisations (e.g. augmented reality, 3D rendering), based on customer sizes or demands, reducing decision fatigue as they browse online.	Augmented by Technology: • **The E-commerce Manager will drive the adoption and improvement of relevant digital capabilities and infrastructure**, keeping up-to-date with relevant technological trends and disruptions, and identifying potential implications on e-commerce operations. • The E-commerce Manager needs to **understand and weigh the use-cases and limitations of the different sales platforms** (e.g. website; online marketplace), to provide a user-friendly online interface with seamless user experience (e.g. seamless payment methods, gamification of websites) for the customers.

Critical Work Function	Key Drivers of Change	Implications on Tasks
Enhance E-commerce Customer Experience	There is greater emphasis on customer centricity and engagement • **Data-driven e-commerce:** Consumer data collected from interactions with the online sales platforms are leveraged to inform the development of personalised touchpoints. • **Rise of new modes of shopping:** Experimentation on new digital channels and business models to unlock new growth opportunities (i.e. social commerce, voice search, live stream shopping, subscription model) • **Embedding technology to enhance customer experience:** Integrating innovative technology (i.e. Augmented Reality, Chatbots) to deliver high quality digital experiences	Job Enlargement: • As e-commerce continues to evolve, there is a need for the E-commerce Manager to coordinate across relevant teams (i.e. Logistics, Digital, E-Commerce) to **implement customer-centric activities or initiatives across all existing or new digital touchpoints**. The E-commerce Manager works with the teams to drive integration of warehousing and inventory systems to streamline the fulfilment process. Job Enrichment: • Features presented on e-commerce sales platforms could trigger product exploration, and convince shoppers through campaigns such as offers and discounts. The E-commerce Manager **needs to upskill and upgrade knowledge across different customer segments and digital platforms** in order to understand differentiated consumer demands, establishing effective and appropriate direct-to-consumer sales activities (e.g. product recommendations, subscriptions).
Drive E-commerce Business Growth	Building brand equity and engagement **Digital customer engagement:** Leveraging the digital storefront to drive branding and marketing activities, reinforcing brand awareness and develop loyalty among consumers. **Seamless omni-channel purchasing journey:** The online sales processes should be a part of the overall integrated customer journey across online and offline platforms, driving higher engagements with customers across channels.	• The online sales processes implemented should also complement the existing sales process in offline channels, allowing customers to browse and select for products easily across sales channels. The E-commerce Manager should **leverage data insights to understand the limitations of the customer-purchasing journey (e.g. large time spent on product page without conversion).** The insights available can help inform the E-commerce Manager in identifying process improvements, and justifying changes implemented (e.g. clear and organised product listings increase customer traffic and sales conversions).

Mercer

Critical Work Function	Key Drivers of Change	Implications on Tasks
Manage Customer Order Fulfilment	<u>Rise in digital sales platform</u> Emphasis on **delivering a unified omni-channel experience and multi-fulfilment strategy** across various sales channels.	Job Enlargement: • The E-commerce Manager needs to **collaborate and coordinate across relevant teams** (i.e. Logistics, Digital, Retail Operations) to deliver the omni-channel experience by developing the organisation's capabilities in executing omni-channel fulfilment activities. Collaboration among the departments also require implementation of real-time warehousing and inventory management system, to provide greater visibility of the stock keeping units (SKUs) across online and offline stores. • The E-commerce Manager has to **monitor the volume of fulfilment requests, update the logistics team on inventory requirements through predictive sales forecasts**, and engage with the customers to gather feedback on the fulfilment process.
[New] Drive Omni-channel Strategy		

A closer look at how tasks would be impacted:

Critical Work Function	Existing task...	...Envisioning the new tasks
Drive Technology and Infrastructure Enablement	[New Task]	• Drive digital change management activities to facilitate buy-in across relevant stakeholders to implement new digital initiatives
	Monitor latest technology and consumer trends and assess suitability for the organisation	• Develop criteria that evaluate effectiveness of current and potential digital capabilities • Review existing capabilities and identify investments required to effectively deliver e-commerce activities
Enhance E-commerce Customer Experience	Analyse service quality and customer satisfaction	• Conduct predictive analysis on service quality and customer satisfaction based on real-time online customer purchasing behaviour metrics (e.g. sales, click-through rates), to drive consumer trends of the future.
	Develop new products and services	• Improve user interface and experience of online stores (e.g. apps, website) by identifying features that elicit top conversion paths and high visitor records, triggering product exploration among consumers. • Collaborate closely with the marketing and digital departments to create creatives that promote an effective customer experience journey
Drive E-commerce Business Growth	Drive e-commerce sales performance	• Orchestrate personalised and targeted strategies, such as market-specific promotions, commercial initiatives and go-to-market plans, to drive e-commerce channel sales. • Plan and execute digital strategies across both internal and external marketplaces to increase sales and business opportunities
Manage Customer Order Fulfilment	Define and revise order fulfilment policies and procedures	• Collaborate across relevant teams to establish alignment on the organisation's omni-channel strategy, including long-term vision and current state • Establish and communicate processes and protocols to effectively drive omni-channel activities across various retail functions • Coordinate with teams to establish cross-channel connections and functions to support omni-channel activities, such as the ability to execute online-to-offline order fulfilment
	Oversee fulfilment activities against established procedures and service level agreement	
[New] Drive Omni-channel Strategy	[New task]	

Upskilling of existing skills

- Business Performance Management
- Business Opportunities Development
- UI/UX Optimisation

New skills for the role

- Technology Adoption and Innovation
- Customer Experience Management
- Omni-channel Management^
- Omni-channel Strategy^
- Category Management
- Transdisciplinary Thinking*
- Digital Fluency*
- Customer Orientation*

*Critical Core Skills
^Skills not in any Skills Framework

Mercer

Marketing

► Marketing Executive
► Marketing Manager

Pivotal Roles In Focus

Marketing Executive
Medium Impact

Marketing Manager
Medium Impact

Marketing of Today

- Conducts marketing research to identify ideal target profiles that are attracted to the product and services provided.

- Raises awareness of the products and services targeted at the selected customer profile, through campaigns such as advertising, digital and content marketing.

- Communicates the brand story, utilising brand visuals and messages developed by brand management teams, to generate and nurture leads that purchase the product or service.

The Future of Jobs in Marketing

1	Integrating **digital technology** and **agile marketing practices**	**Marketing roles need to be attuned with current technology, trends and consumer expectations**, and utilise appropriate digital tools to support the implementation of marketing strategies.
2	**Transforming data into insights**	Technology has currently enabled retailers to gather critical information across multiple customer touchpoints. **Marketing roles need to apply advanced data analytics tools to interpret consumer behaviour data and understand customer journeys**, translating needs and pain points into marketing opportunities that drive a customer-led marketing approach.
3	Highly **transparent** stakeholder management and communication	Social media has transformed brand communications and stakeholder management, providing accessible platforms for consumers to share feedback. **Marketers need to establish a clear brand voice and purpose across the product and corporate practices**, and develop communication and public relations strategies that continuously improve trust between the consumers and the brand.

Trends in Marketing

Key Impact	What Are We Seeing	The New Norm
Attracting Customers with Personalisation	**As the worlds of customer experience and marketing are increasingly merging, the demand for personalised brand relationships is increasing.** • The ease of accessibility to information results in marketing content becoming too overwhelming for consumers. To build affinity with brands, consumers **seek out brands that share relevant information that align with their values,** demonstrate an understanding of their needs and provide services/products that enhance their lifestyles. • It is increasingly critical for retailers to **build and maintain strong relationships** with their loyal customers and ensure that those relationships **generate trust and meaningful engagement over time.**	**Marketing is moving beyond targeting customers in siloed channels towards resolving customer issues by offering timely information on value-added services/products.** • Marketers need to implement customer-centric marketing strategies that **continuously engage customers, build customer loyalty and build a community, while reducing information fatigue among customers.** • Retailers are responding to **changing consumer perceptions by leveraging customer data** at a granular level, driving personalised marketing campaigns to gain customers' attention and enhance brand engagement. • **Hyper-personalisation** of content across multiple platforms (e.g. e-commerce, offline stores, social media) provides context to the interactions with the consumers, driving unique shopping experiences and increasing probability of customer conversion. • Marketers can **develop trust and transparency** while attracting new consumers by providing personalised marketing experiences, to differentiate their products amidst a highly competitive industry where consumers receive a stream of marketing messages.
Embracing Technology-Driven Capabilities	**Technology and data have created more channels and opportunities for marketers to reach their customers.** • As retailers branch out to various offline and online sales channel, they are tapping on technology such as **marketing analytics software** to collect data and derive detailed insights about their customers. **Marketers should ensure design collaterals provide a consistent brand experience for customers across online and offline sales channels.**	**Technology and data are playing an increasingly critical role in enabling the continued evolution of marketing that focused on customer insights and targeted marketing approaches.** • Marketing analytics software can identify **customer segmentation and interaction** with the brand, capturing consumer touchpoints along their shopping journey. • Marketers need to stay updated on types of software available and regulations on social media platforms, constantly **rethinking how they measure the effectiveness of marketing programs,** and identify new ways to monitor metrics (e.g. cost-per-action, lifetime value). • Marketing analytics software also centralise data for **better campaign optimisation,** and **generate real-time insights** on marketing attribution models, driving awareness analysis and understanding customer acquisition costs.

Trends in Marketing

Key Impact	What Are We Seeing	The New Norm
Engaging Directly With Customers	**Covid-19 has accelerated the shift towards e-commerce, and retailers are experimenting with marketing strategies that engage with their consumers directly.** • Social media platforms and the rise of e-commerce shopping provide opportunities for brands to engage and communicate with their consumers directly. Consumers are leveraging these platforms to **voice their opinions and feedback**. • Similarly, retailers are seizing opportunities to **build online communities** through these channels and **gather first-party data to understand their consumers.**	**Increasing direct interactions and establishing transparent relationships with their customers.** • Marketers play an increasingly active role in directly engaging with their customers through **online communities on social media platforms.** • It is critical for marketers to **harness feedback from these platforms**, to deliver impactful and creative content across channels in a timely manner, maintaining a high product turnover rate, increase brand appeal and build a community. • They would also be involved in **addressing negative feedback** and **creating meaningful conversations** with their stakeholders on these platforms.
Leveraging the External Marketing Network	**Retailers are outsourcing parts of the marketing function to external marketing agencies, to leverage on specialised digital and marketing skills.** • As e-commerce platforms and digital marketing software constantly evolve, marketing skills are becoming increasingly complex. Demand for marketers across industries, particularly in the retail sector, has **increased significantly** to perform **specialised marketing skills**. • Retailers are exploring the utilisation of **external marketing agencies** to alleviate talent and strategic challenges, as agencies have the resources to remain updated with latest marketing trends, and deploy marketers effectively to support businesses in developing their marketing strategies.	**As retailers progress in expanding digital marketing journey, they are focused on striking a balance between growing in-house marketing capabilities and leveraging external agencies for scale, speed and pioneering niche skillsets. Contract talent and external agencies can support in providing talent diverse skillsets, given the ever-changing marketing landscape.** • In-house marketing teams can **collaborate with external agencies** to drive marketing campaigns, while maintaining a consistent brand's image and narrative. • Leveraging external support can supplement by providing specialised marketing services such **as research, creative and analysis functions**, to help the internal marketing team develop effective content that are relevant across digital and print formats. • Moving forward, in-house marketers can leverage on the external agencies to **develop necessary skills and strengthen in-house marketing capabilities**.

Hi! I am Gina and I work as a **Marketing Executive.**

At work, I conduct programmatic advertising campaigns, which selectively targets individuals interested in the products. I make sure collaterals are consistent across online and offline campaigns.

OVERVIEW OF IMPACT TO THE ROLE

Level of Impact

MEDIUM

Time Horizon

Immediate — Mid-term — Long-term

Key Trends driving Impact

- Consumer of the Future
- New Retail Model
- Automation & Data
- Future-proofed Supply Chain

⚠ Highly Impacted Retail Archetypes

Non-brand owner

Small & Medium Enterprises

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology
	Complemented by Technology: Role will be supported by marketing analytics and big data software, to better understand and target potential consumers with customised recommendations.
Job Reconfiguration	**Job Enlargement**: Role will have to manage campaigns across emerging sales channels, and develop detailed consumer personas that drive personalised marketing campaigns.
	Job Enrichment: Role will focus on developing new and continuous engagement activities such as social communities, to translate interactions into positive experiences for consumers.

Skills to Grow

Infographics and Data Visualisation
From proficiency level 3 to 4

Data Analytics
From proficiency level 3 to 4

Data Mining & Modelling
From proficiency level 3 to 4
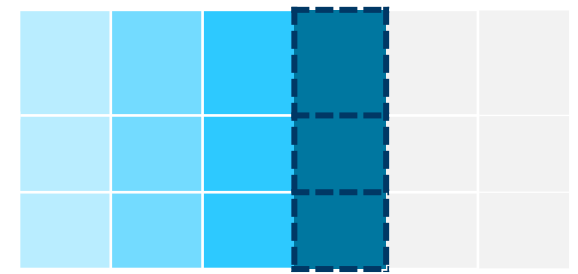
New Skills Required

- Brand Storytelling
- Digital Marketing Management

Marketing Executive will be expected to upskill in:

- **Mining & Modelling:** Integrate data collected from various sources on consumer behaviour to understand the segmentation of the consumer base.
- **Infographics and Data Visualisation, Data Analytics:** Apply data analytics techniques to identify differentiated consumer demand across various demographics, and communicate insights clearly across teams and departments to tailor marketing campaigns.

*Skills and proficiency levels are identified based on Skills Framework for Retail

THE ROLE TODAY

The job role supports the development and execution of the offline, online and social marketing plans. The role would assist in evaluating the effectiveness of marketing communication plans and implement adjustments needed to these plans.

THE ROLE TOMORROW

The Marketing Executive will be expected to work across functions to understand the end-to-end customer journey and deliver a consistent marketing strategy and messaging for brand. He/she needs to be adept in utilising digital tools and platforms to analyse and improve marketing performance. He/she will also assist in taking on more direct-to-consumer activities such as managing social media content and interactions and building an online community to build loyal customers.

Changes in critical work function

Critical Work Function	Key Drivers of Change	Implications on Tasks
Drive Marketing Campaigns **Drive Offline Marketing Campaigns**	**Increasing focus on customer-centric marketing strategy** • The rise of **direct-to-consumer (DTC) business models** means that brands are expected to directly interact with their customers on a regular basis. Brands that fail to engage their consumers are at risk of becoming obsolete. • It is critical for brands to **understand different consumer archetypes, develop personalised marketing strategies and elevate consumer experiences** throughout the entire customer journey.	Job Enlargement: • To keep customers engaged and satisfied throughout their entire journey, the Marketing Executive will need to **collaborate across functions** to **integrate customer insights** into their marketing plans. This includes developing **customer segmentation** and **specific personas across various demographics (age, sales channels),** to inform marketers on curating a personalised customer journey. • **Emerging sales channels due to DTC sales** (e.g. company websites, social media platforms and offline sales channels) drive demand for **dedicated roles to manage marketing campaigns** for the various channels (e.g. offline, social media, online).

Critical Work Function	Key Drivers of Change	Implications on Tasks
Drive Digital Marketing Campaigns	**Utilising technology to support digital marketing strategies** • The **rise of real-time data collection** (e.g. customer interactions with advertisements, weekly/monthly advertisement costs) enable deeper understanding and optimisation of the campaign effectiveness such as identifying the cost per action or increments in new customers/orders from the marketing campaigns launched. • Demand for technology-enabled retail provides opportunities for **omni-channel digital marketing**, implementing **digital marketing campaigns** across online and in-store sales channels. • Increased focus on **data-driven marketing campaigns** across the online and offline platforms to target specific customer segments.	Complemented by Technology: • The Marketing Executive will need to be **familiar with technology such as marketing analytics software, data management tool, search engine optimisation** to reach out to their target audience and utilise data and insights from these software to improve marketing performance across various platforms. • The Marketing Executive will also support the **implementation of big data analytics** software. Artificial intelligence and machine learning can perform targeted analysis of potential consumers, leveraging this to **provide customised campaigns and product recommendation**s to consumers.
Drive Social Media Marketing Campaigns	**Increasing demand for direct community engagement** • Through social media platforms, consumers are able to interact with the brands as well as other consumers. Many actively seek for **online communities** to share their experiences and reviews. • **Social media will offer greater transparency** and brands will need to effectively manage the way they communicate and respond to customers on social media platforms. **Brand awareness through social media partnerships & advertising** • Consumers are relying on social media platforms to **learn about the brands, their positioning and reviews to make smarter purchasing decisions.** • Social media figures such as Key Opinion Leaders (KOL) will be play an important role in influencing consumers' purchasing behaviours.	Job Enrichment: • The Marketing Executive needs to be bolster their ability to **identify and collaborate with the right partners or KOLs** to drive their messages across to the right audience. • The focus will shift from traditional marketing towards **creating a niche community** that **encourages two-way communications** between the brand and customers. • The Marketing Executive may also need to upskill on **customer service and relationship management** skills as they communicate with customers directly (e.g., addressing customer queries on social media platforms) and will need to transform these interactions into positive experiences for the customers.

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Critical Work Function	Key Drivers of Change	Implications on Tasks
Drive Customer Relationship Management [New]	**Customer experience drives greater brand loyalty:** • With the influx of content and messaging, consumers often **change their mind quickly and brands may find it challenging to build loyalty**. • Businesses are competing to deliver **memorable experiences** for their customers, including connecting with their customers throughout their online-and-offline journey and offering other value-added services or products, **integrating both marketing and customer service**.	Job Enrichment: • The Marketing Executive will need to understand the overall **customer experience across different demographics, identifying personas and touchpoints** that support the development and improvement of marketing strategies. • **The Marketing Executive needs to be adept in managing online digital marketing campaigns** (e.g. EDMs; in-app notifications) as well as **in-store marketing campaigns (e.g., roadshows, events)**, to foster strong relationships with existing customers.

A closer look at how tasks would be impacted:

Critical Work Function	Existing task...	...Envisioning the new tasks
Drive Marketing Campaigns	Generate design concepts and ideas for marketing campaigns and communication materials	• Collaborate across departments to understand different consumer demands across demographics, developing specific consumer personas that drive marketing campaigns and communication materials.
	[New task]	• Review brand principles and guidelines to ensure all marketing collaterals are aligned and emphasise key elements in a consistent way.
Drive Offline Marketing Campaigns	Plan contents for print, broadcast, outdoor media roadshows, in-store sales promotions and/or events	• Develop marketing content that is consistent and attractive across online and offline platforms, such as in-store and website sales promotions.
Drive Digital Marketing Campaigns	Produce contents for web, blogs, vlogs, e-newsletters and/or digital platforms' requirements	• Create omni-channel marketing campaigns that integrate offline and digital sales touchpoints smoothly (e.g. access to online stores featured on in-store promotions), offering multiple sales opportunities for the consumers.
Drive Social Media Marketing Campaigns	[New task]	• Coordinate with relevant social media personalities to enhance and establish effective brand partnerships. • Drive direct brand engagements with consumers across social media and peer review platforms. • Review 'live' customer engagement metrics to make real-time changes to social media campaigns.
Drive Customer Relationship Management	[New task]	• Monitor data collected across various customer touchpoints and interactions with the products, to map the customer purchasing journey across sales channels. • Maintain a database of customer information to gain insights on various types of customer segmentation, to deliver effective, tailored marketing messages to the respective customer segments. • Support the implementation of customer relationship strategies such as loyalty programs and cultivate customer participation in the brand community. • Track consumer retention rates across relationship management strategies.

Upskilling of existing skills

- Infographics and Data Visualisation
- Data Analytics
- Data Mining & Modelling
- Brand Campaign Management
- Marketing Campaign Management
- Market Profiling
- Market Research
- Customer Loyalty & Retention Strategy Formulation
- Social Media Management

New skills for the role

- Brand Storytelling^
- Digital Marketing Management
- Learning Agility*
- Digital Fluency*

*Critical Core Skills
^Skills not in any Skills Framework

Hi! I am Tom and I work as a **Marketing Manager.**

I keep updated with the latest marketing trends and consumer insights in retail, and identify new strategies to maintain the relationship between the consumer and brand.

OVERVIEW OF IMPACT TO THE ROLE

Level of Impact

MEDIUM

Time Horizon

Immediate — Mid-term — Long-term

Key Trends driving Impact

- *Consumer of the Future*
- *New Retail Model*
- *Automation & Data*
- *Future-proofed Supply Chain*

⚠️ Highly Impacted Retail Archetypes

| Non-brand owner |
| Small & Medium Enterprises |

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology
	Complemented by Technology: Role will identify key metrics that incorporate marketing analytics and big data insights, to better understand and improve return on marketing investments.
Job Reconfiguration	Job Enlargement
	Job Enrichment: Role will focus on improving brand communications and engagements, ensuring experiences are relevant and effective for both the consumers and the brand.

Skills to Grow

Infographics and Data Visualisation From proficiency level 4 to 5

Customer Behaviour Analysis Proficiency level 4

Market Trend Analysis Proficiency level 4
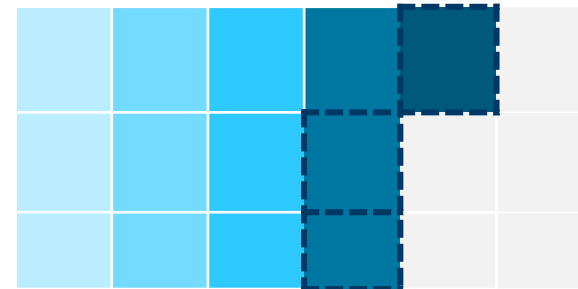
New Skills Required

- Brand Storytelling
- Digital Marketing Management

Marketing Manager will be expected to upskill in:

- **Infographics and Data Visualisation:** Review and formulate data visualisation techniques used to communicate insights from data on dashboards, and apply the findings into marketing strategies and campaigns.

While the skill level remains, the Marketing Manager will be increasingly expected to apply these skills in their role:

- **Customer Behaviour Analysis, Market Trend Analysis:** Strengthen the ability to drive customer behaviour analysis tools to profile target segments, performing analysis and developing strategies based on customer behaviours insights.

*Skills and proficiency levels are identified based on Skills Framework for Retail

THE ROLE TODAY

The Marketing Manager contributes to the realisation of the organisation's business strategies by driving its marketing and public relations programmes. He/she is also responsible for directing the organisation's communication plans, generating data-driven commercial insights and monitoring budgets.

THE ROLE TOMORROW

The Marketing Manager develops the organisation's marketing strategy and oversees implementation and execution. He/she is responsible in aligning and shaping the company's marketing practices and positioning with changing customers' expectations and demands. He/she possesses ability to adapt to changes quickly, have a strong understanding of traditional, digital and social media platform strategies and is able to collaborate with other departments to implement a consistent brand image.

Changes in critical work function

Critical Work Function	Key Drivers of Change	Implications on Tasks
Drive Marketing Campaigns	**Increased consumer demand for digital engagements** • Digital engagements are becoming key sales enablers among Millennials and Gen Z consumers. As they increase their purchasing power, businesses look to **optimise their mobile and digital experiences** to cater to these highly connected consumers. • The pandemic has also pushed retailers and shoppers towards e-commerce and digital sales. With significant growth in digital sales, brands are looking to enhance their **marketing strategies to incorporate digital engagements**. • Consumers are transitioning between in-store product browsing and comparing prices online. These online-to-offline-to-online (O2O2O) purchasing behaviours **drive retailers to provide multiple sales opportunities across online and offline sales channels**, to encourage consumers to make purchases seamlessly at any point of the customer journey.	Job Enrichment: • The Marketing Manager will need to understand and integrate digital engagements, to meet changing consumer habits and improve marketing strategies. • The Marketing Manager is responsible for creating a consistent narrative for the brand, by **establishing effective communication of strategies across teams**, aligning the messages conveyed and fostering visibility and unity in the business. The Marketing Manager has to keep updated with the latest trends and regulations to ensure that team develop strategies that are still **relevant and viable**, given the evolving nature of these digital platforms. • The Marketing Manager also focuses on maintaining consistent across strategies and content that are deployed across the various sales channels to maximise **purchasing likelihood and enabled seamless transaction**s.

Critical Work Function	Key Drivers of Change	Implications on Tasks
Drive Marketing Campaigns	**Digital transformations drives demand for exceptional customer experience** • **Consumers are relying on online research and reviews** to make purchasing decisions. • **Digital media** has made marketing more salient to consumers, **resulting in limited attention for advertisements** among the consumers. • Features on social media platforms have evolved rapidly over the years, **creating differentiated demand for unique content across these platforms** (e.g. permanent vs. ephemeral content; audio only vs. audio & visual content)	Job Enrichment**:** • Consumers expect **unique customer experiences** from interaction with brands. The Marketing Manager will need to build strong knowledge on their **customer segments, effectively leverage customer data and insights** to direct marketing activities. • The Marketing Manager will need to work with the **Brand Management and E-commerce** departments to drive online engagement strategies with consumers, maintaining a consistent brand storyline throughout the customer journey.
Drive Digital Marketing Campaigns	**Utilising data and technology to shape digital marketing strategies** • The **rise of real-time data collection** (e.g. pulse surveys and click-through rates) enables deeper understanding and optimisation of the campaign effectiveness. • Demand for technology-enabled retail provides opportunities for **omni-channel digital marketing**, implementing **digital marketing campaigns** across online and in-store sales channels. • Increased focus on **data-driven marketing campaigns** across the online and offline platforms to target specific customer segments.	Complemented by Technology: • The Marketing Manager will need to assess performance of tech-enabled marketing strategies. For example, they need to develop **metrics** that measure the effectiveness of **technology implementation** (e.g. marketing analytics software) and **data management processes** on marketing campaigns. • They will also be involved in identifying **newer metrics** to evaluate effectiveness of digital campaigns across respective channels (e.g. conversions, lifetime value). • Emerging approaches to predictive analytics and data available have enabled businesses to identify the most valuable customer types and products that generate higher sales. This creates an opportunity to **improve return on investment and efficiency** with highly targeted and responsive campaigns.

Critical Work Function	Key Drivers of Change	Implications on Tasks
Evaluate Customer Relationship Management [New]	**Customer experience drives greater brand loyalty:** • With an influx of **content and messaging**, consumers often change their mind quickly and brands may find it challenging to **build loyalty**. • While some brands have observed a decrease in repeated consumer purchases and **changing consumer spending habits** in recent years, the brands that focus on superior customer experience have often **strengthened their relationships** with customers, maintaining repeated purchases of the brand. For example, brands have **built a niche, close-knit community** with a common **purpose and shared values** among consumers to establish greater relationships.	Job Enrichment: • The Marketing Manager will focus on evaluating the effectiveness of brand engagement in **both new and existing consumers** through **online campaign strategies** (e.g. EDMs; in-app notifications) and **consumer in-store experiences and events**. • To capture the attention of consumers, the Marketing Manager has to develop insights on consumer behaviour, understanding what influences consumers' buying decisions. They can **leverage on these summative consumer insights**, and identify factors that could improve buying patterns across multiple channels and foster greater **two-way communication** with customers.

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A closer look at how tasks would be impacted:

Critical Work Function	Existing task...	...Envisioning the new tasks
Drive Business Strategy	Analyse new market trends, business opportunities and market segments in global and local landscape.	• Identify opportunities for collaboration across departments to align on marketing strategy, positioning and overall message. • Conceptualise consumer personas that will shape targeted marketing campaigns and communication materials.
Drive Marketing Campaigns	Manage creative concept of marketing campaigns and communication materials. Monitor implementation of marketing campaigns. Manage offline (traditional) media channels. Manage social media platforms. Evaluate end-to-end customer experience across offline and digital platforms and customer touch points.	• Propose key metrics that evaluate performance of marketing content across online and offline sales touchpoints. • Review marketing content that is consistent and attractive across online and offline platforms, such as in-store and website sales promotions. • Develop social media strategies that foster new relationships with relevant personalities that would enhance and establish effective brand partnerships. • Evaluate improvement solutions to propose targeted enhancements to marketing strategies with poor engagement performance. • Review existing and new marketing channels for feasibility to promote a coordinated and seamless marketing approach, ensuring consumers are constantly engaged across channels.
Evaluate Customer Relationship Management	[New task]	• Evaluate customer relationship management strategies to develop strong brand communities and manage hyper-personalised communications. • Review performance metrics of customer relationship management, such as social commerce ratings and outreach of personalised messages (e.g. emails, push notifications).

Upskilling of existing skills

- Infographics and Data Visualisation
- Data Analytics
- Data Mining and Modelling
- Customer Behaviour Analysis
- Market Trend Analysis
- Customer Loyalty and Retention Strategy Formulation
- Social Media Management
- Social Media Marketing

New skills for the role

- Brand Storytelling^
- Digital Marketing Management
- Problem Solving*
- Learning Agility*

*Critical Core Skills
^Skills not in any Skills Framework

Brand Management

▶ Brand Executive

▶ Brand Manager

Pivotal Roles In Focus

Brand Executive
Low Impact

Brand Manager
Medium Impact

Brand Management of Today

- Defines and formalises a unique brand strategy, such as brand values and mission, that helps employees and customers resonate with the brand.

- Encourage greater engagement across functions, empowering teams (e.g. marketing, retail operations) to engage with customers and influence how customer perceive the brand.

- Designs consistent brand guidelines across all communication collaterals (e.g. online, offline, visual and text). The team ensures the designs and values are widely recognised and associated with the brand.

The Future of Jobs in Brand Management

1 — Establish **personal and interactive** experiences

Brand management roles have to **explore creative ways (i.e. partnerships, experiential experience)** to drive meaningful experiences and interactions with the products and retail brand.

2 — **Drive competitive brand advantage**

The cycle of innovative experiences driven by brands and rapid market adoption results in brands having to **keep updated with the latest trends to maintain their competitive brand advantage**. Maintaining community engagement efforts across online and offline platforms helps foster a healthy brand community and help brands better understand consumers' needs, elevating the brand position in the market.

3 — Deliver a **unique and transparent** brand equity

Brand management roles have to prioritise transparency in a brand's social approach to align with consumers' expectations and demands, establishing a unique brand identity that resonates with the consumers. Consumers are making more informed purchases, and are demanding for greater clarity on the products' origins throughout the value chain (e.g. manufacturing, supply chain).

Trends in Brand Management

Key Impact	What Are We Seeing		The New Norm
Leveraging social commerce to drive brand equity and transparency	**Social commerce has enabled businesses to engage directly with consumers, promoting and selling products directly on social media platforms.** **While this increases consumers' expectations of brands to deliver accountability and transparency, it also creates opportunities for brands to build a deeper relationship with consumers.** Deeper consumer engagement possibilities including behind-the-scenes livestreams, video consultations, and personalised product recommendations.		**Through social commerce, retailers will continue to build brand equity, accountability and transparency, which are currently lacking in online third party sales platforms and websites.** • Cross-function collaboration and communication between brand management roles and other retail functions will be crucial. **Brand management roles will likely evolve to oversee brand equity and transparency** across sales channels and media platforms. • Digital media platforms such as social media and websites are integral in driving positive brand equity. Consumers are relying on online recommendations and reviews to inform their decisions. Brand management roles have to manage social media accounts and relevant online communities, to **review and respond to organic feedback to improve the overall perception and experience of the brand.** **The rise of purpose-driven brands** • Purpose-driven brand strategies provide emerging retailers potential advantage in entering mature sub-sectors with dominant brands. • **Brands that portray genuine and effective social/environmental purpose are increasingly attractive**, as customers are more willing to support these purposes. • Brands can leverage social media platforms to educate consumers on the brands' purpose-driven journey. Brands should ensure that their green marketing communications are transparent and verifiable, sharing the brand's commitment to ESG and providing resources for consumers to find out more. Proactive and genuine communication on causes such as environmental and social impact will help build deeper relationships with customers. • Stories of the products' origin also foster deeper relationships between the brand and consumers. The **brand storytelling should focus on identifying verifiable product sources and stories of the designers involved**, to create an authentic brand experience for its customers.

Trends in Brand Management

Key Impact	What Are We Seeing	The New Norm
Intensified competition with entrance of more Direct-to-Consumer (DTC) brands	**There has been an increase in new DTC brands that are transforming shopping experiences and expectations.** • Retailers have begun investing in DTC strategies that are often characterised by agile go-to-market capabilities, a distinct brand personality, transparent and memorable interactions.	**With the increase in digital transformation and DTC business model, there is an increased emphasis on strengthening brand positioning through innovation and personalisation.** • Retailers will need to embrace a culture of innovation and adopt an open stance towards technology in order to differentiate themselves. Brand management roles will be responsible for creating experiential retail consumer journeys and working on personalisation, with the aim to build customer loyalty. • The **ability to deliver a unique brand experience while maintaining a highly transparent brand image** will help retailers stand out and attract new customers, amidst a highly competitive industry where consumers receive a constant stream of brand messages. **Customer loyalty has also evolved from a transaction-based to a customer-focused approach.** • Brand management roles have to rethink and differentiate their approach towards customer loyalty, **transforming traditional transaction-based loyalty programmes such as discounts/membership point system into holistic approaches that drive retention across all customer touchpoints**. • One example is to design loyalty programmes that can address customers' pain points in their purchasing journey. Brands are providing customers with guaranteed hassle-free return services to encourage customers to repeat purchases from the brand. Some brands create communities for like-minded individuals to exchange information and participate in social media challenges, helping keep the brand top-of-mind and reinforcing a positive brand image.

Trends in Brand Management

Key Impact	What Are We Seeing	▶▶▶	The New Norm
Tapping on technology solutions to sharpen brand positioning	**Following the pandemic, digitally-advanced businesses have thrived and remained ahead of their competition.** • **Technology and big data are becoming core elements and consideration for branded experiences.** They have been incorporated across various touchpoints, leading to new ways for brands to create better interactions, experiences and connections.		**Availability of customer data and analytics tools support brand management roles in refining and enhancing the overall brand strategy.** • As interactions with product displays are tracked and recorded, **brand management roles can utilise data analytics tools to derive KPIs (e.g. repeated interactions with display) and insights** to improve the overall brand experience. • The increase in customer interactions across online and offline channels drives greater need to focus on developing a consistent and integrated brand experience. • Branding campaigns have **evolved from cyclical marketing exercises driven by the company to engaging the community through content creation**. With the help of social media, companies can track real-time customer engagement with their brands and respond with greater agility. • Brand management roles can **monitor consumer data on social media platforms, tracking behaviours such as status updates, as well as reactions and interactions with the brand**. Brand management roles can analyse the data and conduct sentiment analysis on product offerings, anticipating future consumer behaviours.

Hi! I am Alice and I work as a **Brand Executive.**

I collaborate with teams across the organisation (e.g. marketing, e-commerce) to implement the brand guidelines developed, and periodically update the guidelines based on new consumer insights.

OVERVIEW OF IMPACT TO THE ROLE

Level of Impact

LOW

Time Horizon

Immediate   *Mid-term*   *Long-term*

Key Trends driving Impact

- *Consumer of the Future*
- *New Retail Model*
- *Automation & Data*
- *Future-proofed Supply Chain*

⚠️ Highly Impacted Retail Archetypes

Brand Owner	Jewellery & Timepieces
Fashion & Sporting Goods	

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology: As consumer interaction data become increasingly accessible, the role will focus on analysing real-time data-driven insights to inform on behaviour patterns and brand guidelines required.
	Complemented by Technology
Job Reconfiguration	**Job Enlargement:** Role has to remain updated on current consumer trends, and drive personalised brand guidelines for specific target demographics identified.
	Job Enrichment: Role will have to ensure brand assets and engagement guidelines are consistent across online and offline collaterals and sales platforms.

Skills to Grow

Brand Campaign Management
Proficiency level 3

Social Media Management
Proficiency level 3

New Skills Required

- Brand Storytelling
- Customer Experience Management

While the skill level remains, the Brand Executive will be increasingly expected to apply these skills in their role:

- **Brand Campaign Management:** Monitor customer engagement via responses and qualifying leads, and apply data-driven insights (e.g. click-through rates, conversion rates) to translate customer demands into solutions

- **Social Media Management:** Analysing real-time social media interaction insights, and deliver the organisation's value propositions as well as contextual and targeted messaging via the platforms.

*Skills and proficiency levels are identified based on Skills Framework for Retail

THE ROLE TODAY

The Brand executive implements plans and initiatives relating to the brand, customer experience and loyalty in order to drive the organisation's brand equity. He/she is also responsible for conducting market research activities to forecast emerging market needs that are relevant for the organisation.

THE ROLE TOMORROW

The Brand Executive will continue to drive plans and initiatives that improve the organisation's brand equity. However, he/she will have to navigate through the complexity of different customer segments, social platforms, evolving consumers' trends and expectations in order to execute effective branding campaigns and activities.

Changes in critical work function

Critical Work Function	Key Drivers of Change	Implications on Tasks
Deliver Brand Experience	Increased demand for a personalised brand experience • As consumer expectations evolve and consumer insights become more accessible, there is a **greater desire for personalised consumer engagement through unique and interesting shopper's experience.**	Job Enlargement: • The Brand Executive will need to **keep up-to-date on consumer trends and opportunities across all marketplaces and platforms**, establishing customer loyalty strategies to increase brand awareness and experience. • The Brand Executive is **responsible for implementing loyalty programmes and driving participation across online and offline sales channels.** The loyalty programmes can **support personalised recommendations through digital communications** (e.g. emails, mobile push notifications) based on past purchases and demographics among existing customers. • Analysis of consumer data collected across various platforms (e.g. interactions on social media, consumer demographics) **help drive strategic brand campaigns that accurately target consumers, increasing efficiency of brand awareness** among potential customers.

Critical Work Function	Key Drivers of Change	Implications on Tasks
Drive Brand Equity	The emergence of social commerce • **Social commerce has given rise to opportunities for brand owners to increase brand equity,** through developing a direct-to-consumer strategy and model that owns the customer experience and relationship. Transitioning to a big-data approach • **Availability of big data and machine learning tools** can support the in-depth analysis of consumer demands, identifying changing consumer preferences and implementing actionable solutions to improve branding plans.	Job Enrichment: • The Brand Executive has to **create creative assets that are consistent and appropriate across digital and offline platforms such as social media, e-commerce and offline sales channels**. These assets should provide a seamless perception of the brand, while sharing useful information that support the customer purchasing decision, elevating the overall customer-purchasing journey across sales channels. • The Brand Executive has to **actively maintain positive relationships between the brand and the customers**, through online and offline community engagements such as social media and events. The Brand Executive implements activities and interactions that support the continuous development of the relationship between brand and consumers. Augmented by Technology: • As changes in consumer demand occur rapidly, the Brand Executive has to understand consumers quickly and more effectively. The Brand Executive needs to **incorporate automated, data-driven insights (e.g. latest trends, price-setting) in recommending appropriate brand strategies or activities**. • **Metrics** such as 'likes' on social media, 'clicks' on digital sales platforms and product interaction data from in-store interactions are **translated into customer behaviour patterns**, which reveal preferences for different types of products and services available.

A closer look at how tasks would be impacted:

Critical Work Function	Existing task...	...Envisioning the new tasks
Deliver Brand Experience	Contribute to brand experience ideas and concepts	• Research new technologies that can improve customer engagement and automate branding processes • Analyse brand engagement metrics, such as number of 'likes' on social media or 'views' on marketing billboards, against target consumer demographics that determine preferences across various customer demographics. • Implement personalised branding campaigns based on data-driven insights to enhance customer engagement.
Drive Brand Equity	Execute branding implementation plans	• Implement brand management tools (e.g. digital asset management, content templates) to drive targeted and effective brand messages across different target audience • Leverage appropriate technology platforms, tools and data analytics to monitor KPIs linked to branding initiatives
	Analyse performance of brand campaigns	• Analyse metrics of brand campaigns such as 'click-through rates' and 'product mentions' to derive insights on customer experience and support the development of personalised brand initiatives • Drive transparent communications with consumers through events and social media platforms
	Review effectiveness of brand campaigns	• Analyse the impact and effectiveness of branding campaigns based on real-time feedback obtained through retail store, mobile applications and social media interactions • Collaborate across departments (e.g. marketing, e-commerce) to ensure branding guidelines are effective and aligned across marketing and sales campaigns
	[New task]	• Research consumer trends and expectations, recommending areas of opportunities to improve engagement with evolving customer expectations and needs

Upskilling of existing skills

• Brand Campaign Management
• Data Analytics
• Data Mining and Modelling
• Social Media Management

New skills for the role

• Customer Experience Management
• Brand Storytelling^

^Skills not in any Skills Framework

Hi! I am John and I work as a **Brand Manager.**

I review key metrics and brand guidelines to ensure communications resonate with target demographics. I keep updated with current trends and technology available, to ensure brand strategies remain relevant.

OVERVIEW OF IMPACT TO THE ROLE

Level of Impact

MEDIUM

Time Horizon

Immediate — Mid-term — Long-term

Key Trends driving Impact

- *Consumer of the Future*
- *New Retail Model*
- *Automation & Data*
- *Future-proofed Supply Chain*

⚠️ Highly Impacted Retail Archetypes

Brand Owner	Jewellery & Timepieces
Fashion & Sporting Goods	

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology: Role needs to develop strategies and metrics that can analyse increasingly complex customer data collected (in-store product interaction data).
	Complemented by Technology: Role has to identify and apply relevant technology available to support management and development of brand guidelines.
Job Reconfiguration	Job Enlargement
	Job Enrichment: Role will have to evaluate effectiveness of brand assets and engagement guidelines across online and offline collaterals and sales platforms.

Skills to Grow

Customer Relationship Management
Proficiency level 4

Brand Campaign Management
Proficiency level 4

Data Analytics
Proficiency level 4
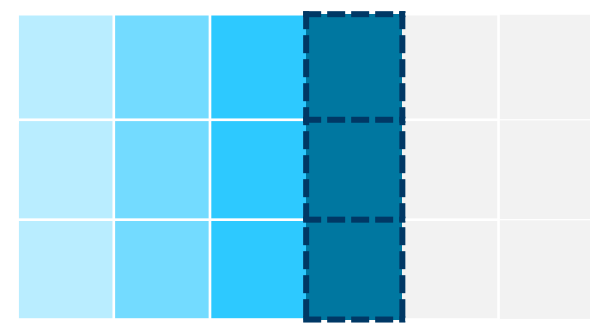
New Skills Required

- Brand Storytelling
- Digital Marketing Management

While the skill level remains, the Brand Manager will be increasingly expected to apply these skills in their role:

- **Customer Relationship Management:** Review customer interaction data collected, and establish brand strategies and practices to improve business relationships between customers and the brand.
- **Brand Campaign Management:** Lead the implementation initiatives and define metrics to track effectiveness of brand messages on customer experiences.
- **Data Analytics:** Leverage big data analytics to develop predictive models for analysing data collected from various sources on consumer behaviour.

Skills and proficiency levels are identified based on Skills Framework for Retail

BRAND MANAGER
Alternative titles: Customer Loyalty Manager

THE ROLE TODAY

The Brand Manager drives the organisation's brand equity through the development of brand plans, customer loyalty plans and brand identity guidelines. He/she leads initiatives to deliver the desired brand experience for the organisation across all channels and responsible for leading market research efforts to formulate plans and strategies for the brand and target customers.

THE ROLE TOMORROW

The role of the Brand Manager will drive the reinvention of the brand experience by embracing technology-driven capabilities across relevant marketplaces and platforms. He/she will continue to explore potential branding opportunities and increasing brand transparency by understanding consumer trends and demands. Moving forward, he/she will also identify and utilise various technological tools to provide personalised experiences to targeted group of customers while leading the implementation of brand campaigns and partnership initiatives.

Changes in critical work function

Critical Work Function	Key Drivers of Change	Implications on Tasks
Enhancing E-Commerce Customer Experience	Rise in omni-channel usage With utilisation of both physical and digital channels simultaneously, there is an **increasing focus on delivering a consistent brand experience** across channels.	Job Enrichment: • The Brand Manager has **greater emphasis to establish brand and social engagement strategies** tailored to specific digital and offline platforms. He/she has to evaluate the creative assets and events implemented across the various platforms.

Critical Work Function	Key Drivers of Change	Implications on Tasks
Drive Brand Equity	The emergence of social commerce • **Social commerce has given rise to opportunities for retailers to increase brand equity,** through developing a direct-to-consumer strategy and model that owns the customer experience and relationship. Transitioning to a big-data approach • **Availability of big data and machine learning tools** can support the in-depth analysis of consumer demands, identifying changing consumer preferences and implementing actionable solutions to improve branding plans.	Job Enrichment: • The Brand Manager has to **evaluate real-time engagements with consumers**, to ensure communications adhere to brand guidelines. • The Brand Manager has to **ensure brand communication standards across sales platforms are transparent**, and resonate with the relevant customer demographics. Augmented by Technology: • Given the increasing complexity in customer data (e.g. demographics in relation with shopping patterns), there is a need for the Brand Manager to **explore various key customer attributes that render valuable insights**, to continuously improve customers' experience and brand management. • The Brand Manager needs to identify metrics such as 'likes' on social media, 'clicks' on digital sales platforms and product interaction data from in-store interactions, translating them into customer behaviour patterns that reveal preferences for different types of products and services available.
Deliver Brand Experience	Increased demand for a personalised brand experience • As consumer expectations evolve and consumer insights become more accessible, there is a **greater desire for personalised consumer engagement through unique and interesting shopper's experience.** Combination of innovative technology and experiential retail strategies to drive stronger brand experience • **Incorporating Augmented Reality/Virtual Reality** applications into the brand strategy to enhance the overall customer experience	Job Enrichment: • The Brand Manager will need to **review consumer trends and opportunities identified across all marketplaces and platforms**, reviewing KPIs of strategies (e.g. loyalty memberships) that increase brand awareness and experience. • The Brand Manager will also **lead the design of new loyalty programmes and oversee the implementation of these programmes** across different channels. Complemented by Technology: • The Brand Manager must develop good understanding of the trends and technology available, to curate an overall brand experience that aligns with the targeted consumer audience. • The Brand Manager needs to be up-to-date on the current consumer trends, and generate data-driven insights that help predict future demand for branding among consumers. • The Brand Manager **drives adoption of technologies across channels targeted based on analysis**, acting as a critical differentiator in enhancing the customer experience.

A closer look at how tasks would be impacted:

Critical Work Function	Existing task...	...Envisioning the new tasks
Enhance E-Commerce Customer Experience	Provide inputs and insights to design and development of customer experience to ensure consistent value propositions across multiple channels	• Provide inputs and insights to design and development of customer experience to ensure consistent value propositions across multiple channels, considering current consumers' trends and expectations identified. • Evaluate communication strategies that drive social engagement across online and offline channels.
	Measure and analyse customer satisfaction and feedback	• Evaluate consumer insights generated from customer interactions to track, measure and analyse customer feedback and satisfaction. • Leverage key consumer metrics, customer feedback and data from e-commerce platforms to uncover limitations of brand campaigns and drive brand strategy.
Drive Brand Equity	Develop brand plans	• Develop branding and customer retention plans through the analysis of customer buying patterns and product insights across all relevant marketplaces and platforms. • Review effectiveness of digital platforms (e.g. CRM) that manage customer interactions. • Generate insights and trend reports to convert new branding opportunities.
Deliver Brand Experience	Develop brand experience ideas and concepts	• Leverage on CRM software and data analytics tools to evaluate the effectiveness of branding campaigns. • Communicate data analytics reports of customers to provide insights and recommendations that improve retention and loyalty programmes. • Collaborate with external stakeholders to assess the requirements of technology tools and solutions to implement new branding development initiatives.
	Drive brand campaign planning	• Review relevant communication platforms, such as mobile applications and social media, for branding opportunities and enhancing overall customer loyalty strategies. • Drive a consistent brand image among online and offline communities. • Develop and execute collaborative content engagements with communities to establish positive brand associations.

Upskilling of existing skills

- Customer Experience Management
- Brand Campaign Management
- Customer Relationship Management
- Data Analytics
- Data Mining and Modelling
- Social Media Management

New skills for the role

- Brand Storytelling^
- Digital Marketing Management
- Adaptability*
- Transdisciplinary Thinking*

Critical Core Skills
^Skills not in any Skills Framework

Merchandising

► Visual Merchandiser

► Merchandising Executive

► Merchandising Manager

Pivotal Roles In Focus

Merchandising Executive

High Impact

Merchandising Manager

High Impact

Visual Merchandiser

Medium Impact
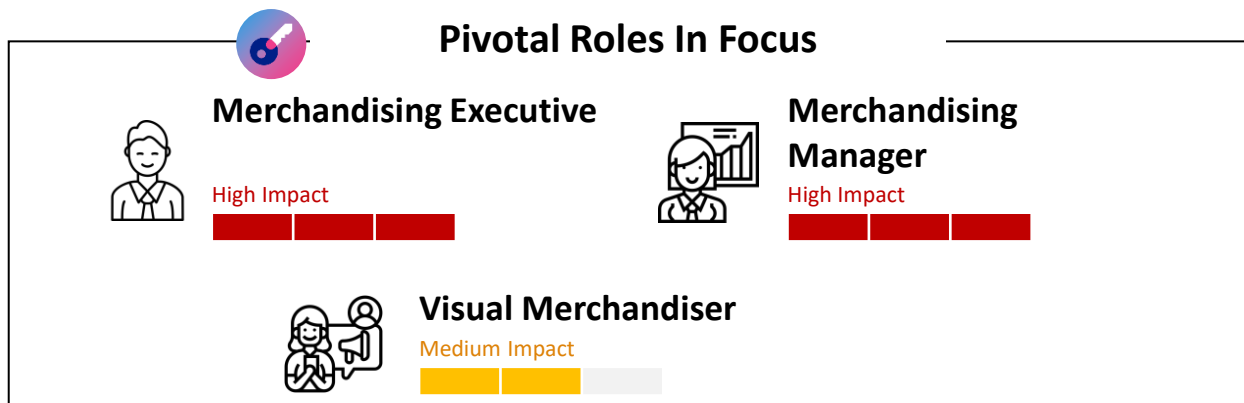
Merchandising of Today

- Develop product category strategies, drive product partnerships and manage supplier sourcing to determine types of products available.
- Predict and forecast inventory demand and supply, allocating sufficient inventory available for order and sales fulfilment.

The Future of Jobs in Brand Management

1 **Automation drives productivity**

Repetitive and time-intensive processes can be automated or redeployed to other retail functions, to allow Merchandisers to have capacity to plan and strategise. Merchandisers will be able to deliver strategic plans in product categorisation, pricing mechanisms and product displays that would meet real customer demand.

2 **Curated experiences and products for consumers**

Merchandising is **transforming into a critical, data-driven function, focused on bringing creative and attractive products and strategies** to engage with the consumers. They serve to analyse product demands of the consumers, curating experiences and identifying new product offerings that are aligned to consumer demand. **As technology changes how merchandisers conduct consumer analysis, they would serve as the innovation engine for the consumers, designing and advocating unique and relevant customer experiences**.

3 **Cross-department collaboration**

As digital sales and social channels become increasingly critical to a retailer's sales strategy, **merchandising roles are expected to coordinate and collaborate with relevant teams** in order to drive appropriate merchandising strategies and activities to be implemented across various customer touchpoints.

Trends in Merchandising

Key Impact	What are we seeing		The New Norm
Shifting Consumer Demands	**As retailers become more efficient in meeting consumer demands, this has normalised instant gratification for trends to be translated into products displayed in retail stores.** • Social media and e-commerce have driven greater efficiency in delivering market trends and products to the consumers. **The rise in efficient market practices and rapid information sharing have resulted in constantly evolving consumer demands with shorter product life cycles.** • Significant business value is created when assumptions about customers align with what they are really seek out. Failure to adapt will increase the risk of excess inventory, lost sales and reduced share of market among retailers.		**The shift towards shorter product life cycles and fulfilling dynamic market trends drives merchandisers to make agile decisions on new and existing product timelines.** • The key to effective merchandising is to adopt enterprise customer-centricity by matching systems and processes to the customer's needs. **The Merchandising function has to collaborate and lead across functions to ensure decisions are made effectively in line with operational and strategic goals.** This ensures that replenishment, assortment, and planning are aligned to satisfy demand.
Embracing technology-driven merchandising	**Business and data intelligence are critical for merchandising to overcome complex, uncertain problems. Digital transformations are shifting merchandising activities towards data-driven processes via smart algorithms, artificial intelligence, and platform retailing solutions.** • Predictive analytics and data-driven insights have been incorporated to execute well-coordinated actions that ensure an efficient supply chain that optimises for demand forecasted, predictive inventory management and assortment planning to serve customers.		**Retailers will need to adapt to new purchasing sentiments and behaviours by offering demand-driven and on-demand merchandising, where digital and physical stores are integrated seamlessly.** • The focus of merchandising will **move towards a unified commerce approach, aiming to serve real demand across online and offline platforms**. The digital and data-first merchandising approach will be vital for retailers to respond to the market demands with the right product offerings efficiently.

Trends in Merchandising

Key Impact	What are we seeing		The New Norm
Unified Commerce Foundation	**As the lines between online and physical shopping become less distinct, there is a need for retailers to anticipate consumption from customers and adapt across both platforms.** The rise of e-commerce as a dominant force in retail has resulted in challenges for merchandising professionals in predicting demand and allocating stock across different channels. They must **balance shifting shopper behavior against ensuring adequate visual display and stocks across all sales channels**. **Visual merchandising is becoming a critical business asset that drives retail conversions in stores and on commerce.** Retailers have been investing efforts in optimising the in-store/digital experience using detailed local consumer data that captures local demand, in order to execute effective visual merchandising techniques that drive traffic and influence purchasing decisions. Social media platforms, websites and interactive AR/VR displays provide attractive visualisations for retailers to proactively engage with consumers and gain attention. Retailers are increasingly aware of the customer-centric approach, revolving design and sales strategies around current and predicted consumer interests.		**Retailers have to integrate tasks laterally to foster collaboration across teams, to drive greater efficiency in executing the unified commerce approach.** Retailers are **introducing multi-dimensional job roles where retail operations and e-commerce teams take on merchandising tasks**, in order to deploy customer-centric products efficiently. Merchandisers have to deploy technology-driven merchandising strategies that enable reviewing and promoting of product categories, while the e-commerce and retail operation teams act as key contributors in driving a comprehensive and seamless customer experience across the channels. **The visual retail experience is pivotal in attracting and retaining customers.** Retailers will **continue to improve and apply existing and new visual merchandising principles and displays to improve customer experience and omni-channel excellence**. This includes utilising retail sales data to establish targeted offerings and building appealing merchandising displays. Visual Merchandisers have to implement attractive strategies across online and offline channels, supporting the drive towards a unified commerce approach.

Hi! I am Mary and I work as a **Merchandising Executive.**

At work, I leverage on data analytics and consumer research to justify the types of products to be launched, as well as procurement details.

OVERVIEW OF IMPACT TO THE ROLE

Level of Impact

HIGH

Time Horizon

Immediate   Mid-term   Long-term

Key Trends driving Impact

- Consumer of the Future
- New Retail Model
- Automation & Data
- Future-proofed Supply Chain

⚠️ Highly Impacted Retail Archetypes

Fashion & Sporting Goods	Department Stores
Non-brand owners	

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology: Role incorporate automation processes to manage time-intensive tasks
	Complemented by Technology: Role utilises real-time data analytics to make agile decisions on product availability and inventory.
Job Reconfiguration	**Job Enlargement:** Role has to define customer journey roadmaps across online, offline and omni-channel platforms, to support sales conversions across sales channels.
	Job Enrichment

Skills to Grow

Customer Behaviour Analysis
Proficiency level 3

Merchandise Buying
Proficiency level 3

Merchandise Performance Analysis
Proficiency level 3
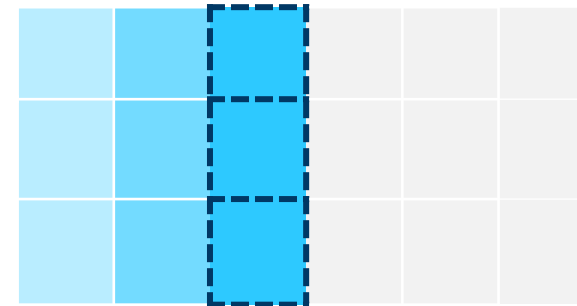
New Skills Required

- Automated Inventory Control
- Artificial Intelligence (AI) Application
- Emerging Technology

While the skill level remains, the Merchandising Executive will be increasingly expected to apply these skills in their role:

- **Merchandise Buying, Customer Behaviour Analysis:** Analyse customer behaviours to determine market trends that shape product buying decisions, and understand the characteristics of the target customer's personas.
- **Merchandise Performance Analysis:** Analyse data on merchandise performance and make data-driven decisions to increase revenue, provide customized services, improve customer experience to induce loyalty and optimise merchandising and related operations.

Skills and proficiency levels are identified based on Skills Framework for Retail

Alternative titles: Category Executive, House Brand Executive

THE ROLE TODAY

The Merchandising Executive implements the merchandising plans and product category strategies as well as managing partner relationships, including the development and sourcing of products in accordance to allocated budgets.

THE ROLE TOMORROW

The Merchandising Executive is expected to leverage data analytics to support strategic decisions in optimising product portfolios, supplier bases, procurement needs and merchandising process efficiencies. The Merchandising Executive will spend less time on repetitive tasks as technology solutions implemented would automate processes such as inventory management, order management and item setup.

Changes in critical work function

Critical Work Function	Key Drivers of Change	Implications on Tasks
Drive Merchandising Strategies	<u>Availability of real-time data to predict changing customer demands:</u> • As the **pace of changing customer expectations accelerates**, customers' behaviour profiles and purchasing behaviours are morphing quicker than merchandising teams can comprehend and act on to effectuate pertinent changes. Merchandising analytics can provide profound insights that enable fast-paced, data-driven merchandising decisions (e.g. dynamic pricing, product gaps) which meet real consumer demand.	<u>Complemented by Technology:</u> • The Merchandising Executive will **increasingly use data analytics tools and skills to enable a comprehensive shift towards effective customer-centric merchandising processes**. Better decision models and agile decision processes would proactively mitigate product-planning activities, reducing opportunity costs when introducing new products. • **Standardised tools based on real-time analytics can also act as an enabler for responsibilities** that require interaction with other parties, such as negotiations and sourcing (e.g. visualisation of historical vendor performance across categories).
Drive Category Management and Product Assortment	<u>Rise of merchandising technologies:</u> • **Advanced planning systems** are increasingly common for automating historical analytics and generating predictive scenarios. • **Dynamic systems with web-scraping** and predictive impact analytics are also creating opportunities for automating pricing and promotions. <u>Rise in digital and social platforms:</u> • The competitive e-commerce landscape results in customers demanding for a **unique shopping experience that is seamless across sales channels**, such as product availability and information across online and offline sales channels.	<u>Augmented by Technology:</u> • The Merchandising Executive should also **focus on applying automation to highly predictable or time-intensive processes** (e.g. item setup, order management). <u>Job Enlargement:</u> • The Merchandising Executive needs to **collaborate with digital teams to help shape the e-commerce experience, and define a digital merchandising footprint that guides users through the customer journey and promote sales conversion.** The digital footprint should align with the in-store retail experience, harmonising to drive a seamless omni-channel retail experience for the customers.

A closer look at how tasks would be impacted:

Critical Work Function	Existing task...	...Envisioning the new tasks
Drive Merchandising Strategies	Analyse information on business environment and merchandising landscape	• Implement new merchandising analytics (e.g. AI-driven analytics) that capture real-time demand and consumer behaviour patterns, to support strategic listing and delisting of products to improve overall sales and customer experience.
	Provide inputs to formulate merchandising strategies	• Review merchandising strategies and KPIs, based on evolving market trends, developing the core information required for technology tools to identify a curated list of products optimised for product relevance. • Implement retail technology solutions (i.e. AR, VR) that help consumers better understand and visualise the product offered prior to making a purchase, to enhance overall customer experience.
Drive Category Management and Product Assortment	Analyse product sales, stock turnover rate and inventory level	• Implement automated inventory control systems to analyse real-time inventory levels, predicting consumer demand patterns based on future business requirements. • Automate stock purchasing activities with inventory predictive analytics, driving efficient communication with supply chain and logistics to predict future product demand. • Implement software integration plans on routine merchandising tasks that require limited human intervention, identifying any additional opportunities for data or feedback collection.
	Analyse customer feedback on product categories	• Review the outcomes of AI tools (i.e. ML & NLP) processing qualitative customer feedback on social media platforms in a way that translates to real-time changes and increased customer satisfaction. • Develop new product categorisation models that are anchored on changing customer behaviour (e.g. new and existing consumers), transitioning away from distinct product hierarchies (e.g. perfumes).

Upskilling of existing skills

- Merchandise Buying
- Customer Behaviour Analysis
- Merchandise Performance Analysis

New skills for the role

- Automated Inventory Control^
- Artificial Intelligence (AI) Application
- Emerging Technology
- Digital Fluency*
- Creative Thinking*

*Critical Core Skills
^Skills not in any Skills Framework

Hi! I am Kate and I work as a **Merchandising Manager.**

I keep updated with the latest merchandising trends, and identify suitable tools and resources that would help the team determine price and products best suited for the targeted consumers.

OVERVIEW OF IMPACT TO THE ROLE

Level of Impact

HIGH

Time Horizon

Immediate — Mid-term — Long-term

Key Trends driving Impact

- *Consumer of the Future*
- *New Retail Model*
- *Automation & Data*
- *Future-proofed Supply Chain*

⚠️ Highly Impacted Retail Archetypes

Fashion & Sporting Goods	Department Stores
Non-brand owners	

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology: Role incorporates real-time data and artificial intelligence tools to guide strategies on product category and target setting.
	Complemented by Technology
Job Reconfiguration	**Job Enlargement:** Role is responsible for mapping workflows and user journeys to identify opportunities make more efficient, data-driven and responsive merchandising decisions
	Job Enrichment: Role harmonises customers, technology and actionable data insights to direct the curation and segmentation of merchandise selections.

Skills to Grow

Customer Behaviour Analysis
Proficiency level 4

Data Analytics
Proficiency level 4

Merchandise Performance Analysis
Proficiency level 4
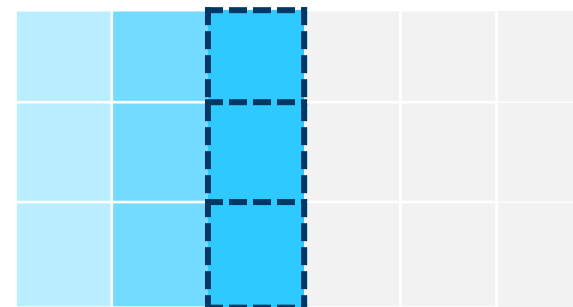
New Skills Required

- Automated Inventory Control
- Artificial Intelligence (AI) Application
- Emerging Technology

While the skill level remains, the Merchandising Manager will be increasingly expected to apply these skills in their role:

- **Customer Behaviour Analysis:** Establish a data-driven customer behaviour analysis model and framework, and devise parameters to identify the various characteristics of customer segments, making informed decisions with insights acquired.

- **Data Analytics, Merchandise Performance Analysis:** Develops processes to analyse performance of merchandise, evaluate trends of profitability and adjust the range of merchandise. He/she needs to develop and drive product mix assessments against merchandise budgets and sales target with statistical modelling and data-mining techniques

*Skills and proficiency levels are identified based on Skills Framework for Retail

THE ROLE TODAY

The Merchandising Manager oversees the implementation of merchandising strategies as well as the development of the private label or house brand products. This includes developing strategic partnerships, managing product assortment, driving product development and budget management. A merchandising manager is expected to regularly review market and industry trends to drive appeal of merchandises to target customers.

THE ROLE TOMORROW

The Merchandising Manager will concentrate time and creative efforts on differentiating their products and services, and innovating ways to alleviate the Merchandising Executive's role in routine merchandising tasks. The Merchandising Manager will also review processes and strategies to drive curated experiences for the consumers, creating a justified merchandise structure across sales channels to provide a complete range of products available.

Changes in critical work function

Critical Work Function	Key Drivers of Change	Implications on Tasks
Drive Merchandising Strategies	Availability of real-time data to predict changing customer demands: • As the **pace of changing customer expectations accelerates**, customer behaviour profiles and purchasing behaviours are morphing quicker than merchandising teams can comprehend and act on to meaningful change. **Merchandising analytics can provide the impactful insights needed to make crucial merchandising decisions** (e.g. dynamic pricing, product gaps) to meet real consumer demand. • **Long-term business planning** can also leverage the wealth of data available, making specific forecasts on consumer demand with multiple factors (e.g. seasonality) considered. • Customers are aware of environmentally and socially sustainable products, and there is an increasing demand for brands to be **transparent about their product sources**.	Augmented by Technology: • With artificial intelligence and availability of real time data, the Merchandising Manager can utilise internal and external insights to guide top-down business plans on product category strategy and target setting. Job Enrichment: • The Merchandising Manager will serve as a critical fulcrum to harmonise customers, technology and actionable data insights to direct the curation and segmentation of merchandise selections. This **will enable retailers to personalise product offerings effectively based on multiple contextual factors** (e.g. sustainability of products, seasonality).
Drive Category Management and Product Assortment	Rise of merchandising technologies: • **Advanced planning systems** to automate historical analytics and generate predictive scenarios. • **Dynamic systems with web-scraping** and predictive impact analytics could automate pricing and promotions. Rise in digital and social platforms: • The competitive e-commerce landscape demands Merchandisers **to provide a seamless shopping experience with customised product recommendations for their customers**.	Job Enlargement: • Online and offline sales platforms have become integrated, and retailers are focusing on delivering a consistent omni-channel experience for its consumers. • The Merchandising Manager is **expected to make informed decisions on types and quantity of products displayed on the various sales platforms**, based on product-specific purchasing behaviours and demand. The Merchandising Manager will be responsible for mapping workflows and user journeys to identify opportunities make more efficient, data-driven and responsive merchandising decisions.

A closer look at how tasks would be impacted:

Critical Work Function	Existing task...	...Envisioning the new tasks
Drive Merchandising Strategies	Analyse customer insights, market trends and business environment	• Evaluate outcomes of innovative merchandising analytics tools to generate in-depth insights on past performance, merchandising trends, customer behaviour, and key customer segments.
	Develop overall merchandising strategies and determine operational implications	• Develop merchandising strategies and KPIs, based on evolving market trends, which enable technology to identify a curated list of products optimised for product relevance. • Review retail technology solutions (i.e. AR, VR) that help consumers better understand and visualise the product offered prior to making a purchase, to enhance overall customer experience.
	Drive visual merchandising strategy	• Lead the implementation of technology (e.g. AR Technology & Smart Algorithms) across visual merchandising strategies, collaborating with other teams to enhance physical retail experiences and create new opportunities for e-commerce visual merchandising. • Establish visual merchandising principles and strategies that guide the development of visuals that are relevant across online and offline channels.
Drive Category Management and Product Assortment	Manage product sourcing	• Evaluate the effectiveness of automated inventory control systems to analyse real-time inventory levels, and implement relevant improvement plans. • Identify opportunities for software integration plans for routine merchandising tasks to increase efficiency, based on data-driven insights derived from merchandising analytics tools and techniques such as workflow or process mapping. • Collaborate with respective teams (e.g. supply chain, strategy) to identify products with a sustainable product value chain (e.g. supply chain and manufacturing), increasing the brand's commitment to social and environmental sustainability.
	Assess product categories, product assortment and product performance	• Establish key metrics to measure product performance (e.g. usage, retention and engagement) • Evaluate the effectiveness of key metrics on product analytics tools, ensuring products sourced are cost effective and profitable. • Communicate results of key metrics through real-time, interactive and centralised data visualisations, ensuring results analysis are distributed accurately and efficiently across teams.

Upskilling of existing skills

- Customer Behaviour Analysis
- Merchandising Performance Analysis
- Data Analytics
- Infographics and Data Visualisation
- Merchandise Buying

New skills for the role

- Automated Inventory Control^
- Artificial Intelligence (AI) Application
- Emerging Technology
- Adaptability*
- Creative Thinking*

*Critical Core Skills
^Skills not in any Skills Framework

Hi! I am Pat and I work as a **Visual Merchandiser.**

I ensure visual collaterals across online and offline stores are aligned with brand strategies, and ensure products displayed are attractive in-store and on the brand's website.

OVERVIEW OF IMPACT TO THE ROLE

Level of Impact

MEDIUM

Time Horizon

Immediate — Mid-term — Long-term

Key Trends driving Impact

Consumer of the Future | New Retail Model | Automation & Data | Future-proofed Supply Chain

⚠️ Highly Impacted Retail Archetypes

Fashion & Sporting Goods	Department Stores
Non-brand owners	

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology
	Complemented by Technology
Job Reconfiguration	**Job Enlargement:** Role has to adapt traditional visual merchandising techniques to transport the brand's online footprint into the physical stores
	Job Enrichment: Role has to understand consumer-related trends, preferences and traits, to design effective and targeted strategies across different customer segments

Skills to Grow

Visual Design and Communication Principles
Proficiency level 3

Visual Merchandising Presentation
Proficiency level 3

Customer Behaviour Analysis
Proficiency level 3

New Skills Required

- Brand Storytelling
- User Interface and User Experience (UI/UX) Optimisation
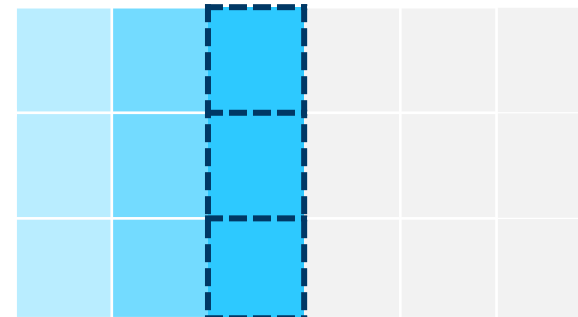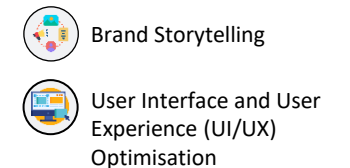
While the skill level remains, the Visual Merchandiser will be increasingly expected to apply these skills in their role:

- **Visual Design and Communication Principles:** Review visual design and communication principles to assess creative solutions to design briefs of the multimedia products across online and offline platforms.
- **Visual Merchandising Presentation:** Develop visuals that are coherent and easily implemented across online and in-store sales channels
- **Customer Behaviour Analysis:** Develop visual merchandising collateral based on customer experience strategies and trends

*Skills and proficiency levels are identified based on Skills Framework for Retail

THE ROLE TODAY

The Visual Merchandiser manages shopper marketing activities and is responsible for the conceptualisation of the visual merchandising plans. He/she oversees the set-up of merchandise display by coaching in-store team, conceptualising eye-catching product displays, store layouts and designs to promote the store's product.

THE ROLE TOMORROW

The Visual Merchandiser role will be extended across different retail platforms (e.g. online and offline), and is expected to play a critical role in shaping and coordinating merchandising activities from pop-up stores to the e-commerce landscape.

Changes in critical work function

Critical Work Function	Key Drivers of Change	Implications on Tasks
Oversee Visual Merchandise Display and Plans	Proliferation of digital tools that support creative visualisation: • **The greater availability of high quality video and audio content** means that this form of media has become an integral part of the online visual merchandising strategy; this approach is used widely by retailers across sales platforms to promote their products and services. • Product visuals have transitioned from conventional, printed in-store displays featured across longer durations, towards **digital displays in-store and on online platforms** containing visuals that are **updated frequently**. Rise in digital sales and social platforms: • Customers are demanding a **seamless transition between online and offline sales channels** as part of the omni-channel approach. Visuals have to be **easily replicated** across online and offline platforms, featuring the various sales channels available for consumers to access the relevant channel easily. There is a need to balance consistency and ease of customisation for the requirements of specific channels. Increasing demand for experiential and immersive retail to deliver personalised products and experiences: • **Pop-up displays** are increasingly used as a tool to engage with customers and increase traffic in dynamic, personalised ways. • **Augmented Reality (AR) /Virtual Reality (VR)** applications are also playing a role to create unique and immersive experiences. • **3D modelling and product simulation software** are used to visualise products unavailable in photographs, displaying customised orders and requests.	Job Enrichment and Job Enlargement: • The Visual Merchandiser will have to **adapt traditional visual merchandising techniques to transport the brand's online footprint into the physical stores**. • The Visual Merchandiser will collaborate and communicate across offline and digital teams help ensure greater focus and consistency of visual merchandising activities as part of the omni-channel experience. • The **Visual Merchandisers needs to understand consumer-related trends, preferences and traits**, to design effective and targeted strategies across different customer segments. There will be an increased focused on the use of AR/VR technology to complement visual merchandising efforts.

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A closer look at how tasks would be impacted:

Critical Work Function	Existing task...	...Envisioning the new tasks
Oversee Visual Merchandise Display and Plans	Plan and design visual merchandising displays	• Review data-driven customer insights to craft informed strategies and layouts across channels and targeted segments. • Design visual merchandising approaches that are interactive and attractive on both offline and online platforms. • Integrate content featured on in-store displays with content enabling customer interaction as displays become digital and interactive. • Collaborate with e-commerce and operations team to contribute to the overall omni-channel visual experience.
	Evaluate effectiveness of visual merchandising plans	• Evaluate the effectiveness of visual collaterals through real-time data analytics of customer interactions with digital displays found in-stores (e.g. eye-tracking, clicks), to identify gaps and opportunities for improvements.
	Conduct research on visual merchandising and shopper trends	• Integrate findings from research on visual merchandising and shoppers trends with browsing behaviour data that is collected through centralised websites/mobile applications. • Implement suggested digital tools and merchandising approaches that drive consumer engagement and conversion rates.

Upskilling of existing skills

- Customer Experience Management
- Customer Behaviour Analysis
- Visual Merchandising Presentation
- Visual Design and Communication Principles

New skills for the role

- Brand Storytelling^
- User Interface and User Experience (UI/UX) Optimisation
- Collaboration*
- Creative Thinking*
- Digital Fluency*

*Critical Core Skills
^Skills not in any Skills Framework

Logistics & Supply Chain

► Logistics Operations Analyst

► Logistics Solutions Specialist

► Warehouse Operations Manager

Pivotal Roles In Focus

Logistics Operations Analyst

Medium Impact

Logistics Solutions Specialist

Low Impact

Warehouse Operations Manager

Medium Impact

Logistics & Supply Chain of Today

- Manage warehouse and delivery operational policies and procedures to drive an efficient inventory management process (e.g. on-time deliveries, replenishing stock).
- Collaborate with the retail operations teams, to ensure in-store inventory levels are sufficient for order fulfilment.

The Future of Jobs in Logistics & Supply Chain

1

Key anchor in coordinating omni- and multi-channel fulfilment activities

Supply chain roles will **maintain oversight of inventory across functions**, liaising with merchandising, retail operations and e-commerce functions to ensure products are sufficient in the respective sales channels.

2

Embrace technology adoption and improvement

Supply chain and logistics roles will identify key risks across sales channels, and **recommend solutions to help maintain a robust customer fulfilment process**. Technology and automation, alongside people harmonisation, will become apparent across every node in the supply chain. Automation of transactional and repetitive tasks in the supply chain would allow solutions to evolve with changing business models and consumer demands.

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Trends in Logistics & Supply Chain

Key Impact	What are we seeing	The New Norm
Optimising supply chain vulnerabilities	**Supply chain disruptions have been happening with increasing frequency and severity.** • The pandemic has exposed global logistic network vulnerabilities, such as future political instability, natural disasters, and regulatory changes. Shipping delays, shipping costs, and manufacturing delays have become top supply chain–related concerns for businesses. • **Retailers facing disruptions in receiving their inventory supply also face challenges in providing last-mile services to their customers**, driving greater emphasis on supply chain. **There has been a renewed focus on decentralisation and digitalisation.** • Optimising supply chain and distribution through digitalisation and decentralisation of supply has been gaining momentum. This is critical in gaining a competitive edge against slower moving competitors as retailers focus on decreasing costs, improving margins, and establishing better relationships with the end–customer.	**As challenges persist in the long term, retailers will look to build resilience into their supply chains and future-proof operations.** • There will be a call-to-action to proactively re-examine supply chain and distribution strategies to reduce the impact of global disruptions, giving rise to opportunities for retailers to innovate how goods are procured, distributed and delivered. • Retailers are **actively diversifying their supply chain activities and raw material sources, to prevent an over-reliance on the particular elements of the manufacturing and logistics value chains**. Diversification of these processes and resources would mitigate significant cost and supply issues when a value chain becomes disrupted. **Incorporating technology and data across different aspects of the supply chain will remain as a key focus area to future-proof operations**. • While shorter supply chains are a medium- to long-term goal for some companies, **using data and technology to guide decision-making would be a priority in the immediate future** to improve their visibility and responsiveness. • Companies are utilising digital tools to track and review effectiveness of logistics service providers, to ensure supply chain processes are robust against evolving situations • There is also an increased emphasis on outsourcing last-mile delivery to specialised logistics providers to improve efficiency in the supply chain process and gain a competitive edge.
Heightened focus on Environmental & Social Responsibility	**Brands are starting to implement more sustainable practices as consumers are demanding socially conscious and environmentally sustainable businesses.** • Environmental and social factors have been emerging as strong influencers on supply chain and logistics. **Consumers are increasingly holding retailers accountable for their social and environmental impact.**	**Quantifying and reinventing social and environmental impact will define the next era of shipping and logistics.** • Retailers are **revisiting supply chain processes and strategies to focus on sustainability** and ultimately position businesses to retain customers and drive long-term growth. • They have started building environmentally and socially sustainable practices into supply chains and materials used, as well as ensuring ethical working conditions among manufacturing plants. • Retailers are also incentivised to identify and resolve operational inefficiencies, promoting sustainability and mitigating additional cost savings.

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Trends in Logistics & Supply Chain

Key Impact	What are we seeing	The New Norm
Exponential growth of e-commerce fulfilment	**As volumes and channels increase, order fulfilment is the focus of retailers in E-commerce.** E-commerce retailers are trying to optimise their order fulfilment process to ensure that their customers receive their orders promptly and as expected. **A properly executed order fulfilment process can help build customer satisfaction and loyalty.**	**Technology is being integrated to fulfilment processes to automate and eliminate issues in tracking and shipping.** Retailers will incorporate real-time delivery tracking, delivery route optimisation, and AI/Bot assisted planning to aid order fulfilment processes and **provide better transparency and visibility for the customers**.
Increased expectations for delivery	**Higher-than-ever delivery expectations are colliding with the reality of fulfilment challenges.** • Due to increased competition, consumers have rising expectations of delivery services, normalising retailers to provide fast, cost-effective and tracked delivery. • **Retailers are turning to alternative warehousing and distribution partners that utilise technology-enabled warehouses while maintaining cost-effectiveness,** in order to overcome supply chain risks and meet customers' expectations. **Outsourcing shipping and fulfilment to third-party logistics (3PL) providers.** • Once perceived as a solution only for enterprise-sized brands, third-party logistics providers (3PL) are now key for retailers of any size with intentions to scale to diversify supply chain risks.	**Warehousing and delivery have become key drivers of the overall retail experience.** • **A key focus area for supply chain will be to establish a friction-free and transparent purchasing experience for customers and retailers**. Retailers can manage customer expectations with transparent delivery timelines and drive greater efficiency through delivery-related communication (e.g. electronic data interchange, real-time delivery information). • Retailers have to integrate reverse logistics policies and processes into warehousing and delivery services. Warehouses have to process the returns, and determine if items can be re-sold via discount sales channels, recycled or disposed. These processes help minimise environmental wastage and costs, while building a better returns experience for the customer.

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Trends in Logistics & Supply Chain

Key Impact	What are we seeing		The New Norm
Warehousing of the future	**Retailers are shifting away from dedicated warehouses to multiple models, including in-store inventory / micro fulfilment centres.** • Logistics providers are moving towards a **logistics marketplace model that allow effective capacity management across retailers**. Technology and data-driven capacity planning can reduce planning errors while accounting for temporary demand during peak seasons. The logistics marketplace can take advantage of multi-modal optimisation, allowing sophisticated planning across delivery routes and warehouses to achieve lead time and cost goals.		**Warehouses are moving towards an integrated approach that promote transparency and visibility for retailers and consumers.** • Warehouses will **leverage technology for automated capacity management for inventory.** The increase in efficiency in stock management will drive on-demand warehousing, allowing logistics providers to utilise warehouses based on retailers' demand. • **Leveraging data and analytics would support logistics providers in making better decisions.** Warehouses can forecast potential demand and adapt accordingly, changing their logistics solution strategy to fit the circumstances. • **Multiple- and omni-channel sales fulfilment will require technology enabled warehouses and other fulfilment channels**, ensuring inventory across sales channels continue to be stocked and available for customers' purchases.

Hi! I am Teck Yew and I work as a **Logistics Operations Analyst.**

I review key metrics that signal potential pitfalls across the logistics and supply chain network, ensuring operations are efficient and meeting customer expectations across sales fulfilment channels.

OVERVIEW OF IMPACT TO THE ROLE

Level of Impact

MEDIUM

Time Horizon

Immediate   Mid-term   Long-term

Key Trends driving Impact

- Consumer of the Future
- New Retail Model
- Automation & Data
- Future-proofed Supply Chain

⚠ Highly Impacted Retail Archetypes

Supermarkets & Convenience Stores	Jewellery & Timepieces
Furniture & Household	

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology
	Complemented by Technology: Role will integrate data analytics tools in analysing the effectiveness of delivery and reverse logistics operations across multiple sales channels.
Job Reconfiguration	Job Enlargement
	Job Enrichment: Role has to leverage tools such as AI/ML to perform data preparation and analysis

Skills to Grow

New Skills Required

Logistics Solution Design Thinking
Proficiency level 3
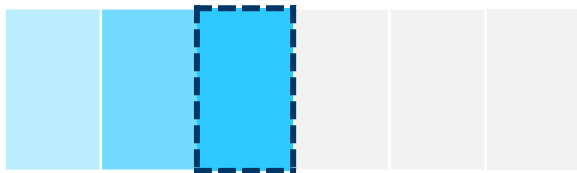
- Autonomous Logistics Design and Application
- Customer Experience Management
- Data Analytics

While the skill level remains, the Logistics Operations Analyst will be increasingly expected to apply these skills in their role:

- **Logistics Solution Design Thinking:** Construct solutions based upon logic, imagination, intuition and systemic reasoning to explore possibilities that will benefit the organisation and customers, breaking down complex issues and engage customers to design end-to-end solutions.

*Skills and proficiency levels are identified based on Skills Framework for Logistics

THE ROLE TODAY

This job is responsible for the engagement of internal and external stakeholders, analysing customers' requirements & needs, supporting implementation of solutions and executing logistics programmes on behalf of customers.

THE ROLE TOMORROW

In the longer-term, this role will increase its focus on leveraging data to understand potential bottlenecks and inefficiencies in the supply chain. The Logistics Operations Analyst will identify solutions that tackle operational inefficiencies across warehousing & transportation operations, driving quicker operational activities that translates into higher cost savings.

Changes in critical work function

Critical Work Function	Key Drivers of Change	Implications on Tasks
Perform Data Analytics Tasks	Enhancing data analytics: • **Artificial Intelligence (AI) and Machine Learning (ML) can analyse and interpret huge datasets quickly**, synthesising consumer trends and providing guidance on forecasting supply and demand.	Job Enrichment: • The Logistics Operations Analyst can leverage tools such as AI/ML to perform data preparation and analysis. The role will **shift its focus towards data interpretation and identifying operational solutions** that enhance overall logistics operations.

Critical Work Function	Key Drivers of Change	Implications on Tasks
Perform Logistics Solutioning Tasks	Disruptions of global supply chain & changing consumer expectations: • Retailers are incentivised to review their logistics performance and identify solutions to increase the resiliency of their supply chain. • With the rise of e-commerce and changing consumer expectations, retailers are introducing looking for innovative logistics solutions that can address customers' needs. Embedding technology in logistics operations to optimise efficiency: • Technology such as AI, block chain, wearables and mobile devices can support logistics operations and activities in gathering real-time data to provide greater insights on operation efficiency.	Complemented by Technology: • The Logistics Operations Analyst will integrate data analytics tools in **analysing the effectiveness of delivery and reverse logistics operations across multiple sales channels**. Sensor data coupled with reporting capabilities will allow the Logistics Operations Analyst to identify potential risks involved in the operations throughout the logistics value chain. • The Logistics Operations Analyst will have to develop solutions (e.g. transparent delivery schedules) to mitigate and resolve these risks, driving quicker operations that would translate into cost-savings and positive brand experience for the customers.

A closer look at how tasks would be impacted:

Critical Work Function	Existing task...	...Envisioning the new tasks
Perform Data Analytics Tasks	Analyse data and research outputs to offer explanations for data findings	• Drive big-data collection and analytics by leveraging tools such as artificial intelligence and machine learning software. • Translate research findings into actionable insights to assess logistics operations performance. • Provide advice to internal stakeholders based on observed trends to inform business decisions.
Perform Logistics Solutioning Tasks	Execute supply chain operations for customers	• Design and implement new procedures, processes and technology to address evolving stakeholders' needs. • Support continuous improvement of supply chain operations based on data and market practices. • Implement digital tools (e.g. chatbots) to augment customer service tasks and maintain positive customer experiences.

Upskilling of existing skills

• Logistics Solution Design Thinking

New skills for the role

• Customer Experience Management
• Order Fulfilment Administration
• Autonomous Logistics Design and Application
• Data Analytics
• Data Mining & Modelling
• Infographics and Data Visualisation

Hi! I am Ben and I work as a **Logistics Solutions Specialist.**

At work, I take on pilot projects and implement innovative logistics solutions to determine cost savings and effectiveness on the logistics operations.

OVERVIEW OF IMPACT TO THE ROLE

Level of Impact

LOW

Time Horizon

Immediate   Mid-term   Long-term

Key Trends driving Impact

Consumer of the Future

New Retail Model

Automation & Data

Future-proofed Supply Chain

⚠️ Highly Impacted Retail Archetypes

Supermarkets & Convenience Stores	Jewellery & Timepieces
Furniture & Household	

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology
	Complemented by Technology
Job Reconfiguration	Job Enlargement
	Job Enrichment: Role shifts towards problem-solving and solutioning based on customer and technical knowledge to drive high quality service experience for the customers.

Skills to Grow

Integrated System Design and Application
Proficiency level 3

E-Logistics IT Solutioning
Proficiency level 4
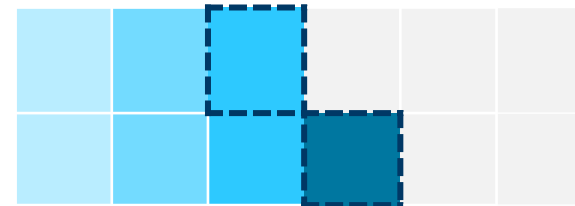
New Skills Required

- Autonomous Logistics Design and Application
- Automated Inventory Control
- Data Analytics

While the skill level remains, the Logistics Solutions Specialist will be increasingly expected to apply these skills in their role:

- **Integrated System Design and Application:** Manage systems of interrelated computing devices and systems, mechanical and digital machines, objects and people to allow transfer of data over the network so as to support business requirements. He/she has to develop system integration approaches and review system integration procedures.

- **E-Logistics IT Solutioning:** Integrate internet-based technologies with back-end processes to improve logistics operations and develop new logistics management practices to support technological advances.

*Skills and proficiency levels are identified based on Skills Framework for Logistics

Logistics Solutions Specialist
Alternative titles: Logistics Solutions Engineer

THE ROLE TODAY

The job role is responsible for coordinating development of end-to-end bespoke logistics solutions for customers, across transportation & warehousing.

THE ROLE TOMORROW

The job role continues to leverage on technical expertise, domain knowledge and creative problem-solving, to design and innovate logistics solutions that are tailored to the needs of retailers and consumers.

Changes in critical work function

Critical Work Function	Key Drivers of Change	Implications on Tasks
Perform Logistics Solutioning Tasks	<u>Innovative practices and strategies</u> • The **competitive dynamics** of e-commerce, lack of clarity on efficient technologies and new omni-channel distributions would drive supply chain technology disruptions. <u>Expectations for sustainable practices:</u> • Consumers are starting to demand **socially conscious and environmentally sustainable** businesses.	Job Enrichment: • The Logistics Solutions Specialist will **review the implementation of new innovative fulfilment options** in order to support efficient delivery schedules and strong pricing effectiveness (e.g. direct shipment from the production facility to consumers, pop-up nodes).
Perform Data Analytics Tasks	<u>Enhancing analytics through availability of real-time data</u> • **Real-time data collection and analytics** (e.g. AI, machine learning) allow tracking and tracing of events across the supply chain network, managing peak requirements and unexpected disruptions.	Job Enrichment: • With a real-time visibility on supply chain processes, the Logistics Solution Specialist would **serve to be a critical role in harmonising data and consumer's expectation** to drive high quality service experiences while improving cost structure and profitability for the retailers.

Critical Work Function	Key Drivers of Change	Implications on Tasks
Perform Customer Service Tasks	Enhancing analytics through availability of real-time data: • **Machine learning and artificial intelligence analysis** can identify potential issues in operations in pricing, routing and delivery progress.	Job Enrichment: • The Logistics Solutions Specialist **will shift towards problem-solving and solutioning based on customer and technical knowledge**. Technical expertise is required to analyse research and AI insights in the context of customer issues and needs. • The Logistics Solutions Specialist will have to visualise data on potential market opportunities and issues in the supply chain processes quickly, identifying potential solutions that help retailers cope with increasing customer demand.

A closer look at how tasks would be impacted:

Critical Work Function	Existing task...	...Envisioning the new tasks
Perform Logistics Solutioning Tasks	Review gaps and weaknesses in supply chain operations	• Develop efficient root cause analysis on gaps in current supply chain operations through data visualisation and AI. • Design alternative logistics solutions across warehousing, transportation and freight forwarding through simulation modelling and analysis.
Perform Data Analytics Tasks	Analyse the wider implications of analysis and research to draw inferences on logistics operations Develop business solutions using big data analytics	• Perform big data analytics techniques such as association rule learning to enable the analysis of implications of research on logistics operations of customers. • Implement skills in programming languages (e.g. R and Python), to conduct complex, real-time data science analysis (e.g. data mining and modelling). • Review proposals for new logistics solutions or locations to identify potential barriers or opportunities.
Perform Customer Service Tasks	Plan delivery of logistics services that meet customer requirements	• Modelling with multiple data points (e.g. customer services, transaction activities, price sensitivity, risk) will enhance predictive capabilities of AI algorithms to augment solutioning and business development tasks.

Upskilling of existing skills

- E-Logistics IT Solutioning
- Integrated System Design and Application

New skills for the role

- Automated Inventory Control^
- Autonomous Logistics Design and Application
- Infographics and Data Visualisation
- Data Analytics
- Data Mining & Modelling

^Skills not in any Skills Framework

Hi! I am Michelle and I work as a **Warehouse Operations Manager.**

I leverage on big data analytics and key metrics to oversee the daily warehouse management activities, implementing automation among repetitive processes.

OVERVIEW OF IMPACT TO THE ROLE

Level of Impact

MEDIUM

Time Horizon

Immediate — Mid-term — Long-term

Key Trends driving Impact

- *Consumer of the Future*
- *New Retail Model*
- *Automation & Data*
- *Future-proofed Supply Chain*

⚠ Highly Impacted Retail Archetypes

Supermarkets & Convenience Stores	Jewellery & Timepieces
Furniture & Household	

DETAILED LOOK INTO IMPACT ON THE ROLE

Category of Impact	Types of impact to the role
Technology Implementation	Displacement by Technology
	Augmented by Technology: Role shifts towards performing monitoring activities such as tracking and analysing productivity metrics (e.g. inventory turnover, costs).
	Complemented by Technology
Job Reconfiguration	Job Enlargement
	Job Enrichment: Role is complemented by daily insights that allow he/she to review and drive effective warehouse operations practices

Skills to Grow

Warehouse Automation Application
Proficiency level 5

Warehouse Space Utilisation
Proficiency level 5

Warehouse Performance Measurement
Proficiency level 5
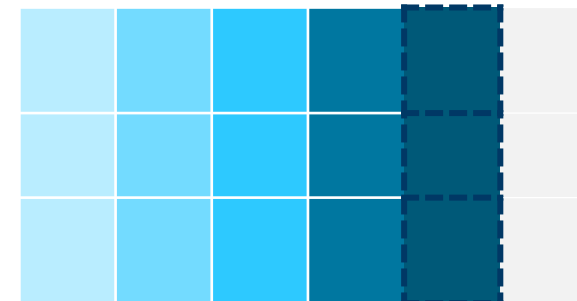
New Skills Required

- Automated Inventory Control
- Environmental Protection Management
- Transport Management System Administration

While the skill level remains, the Warehouse Operations Manager will be increasingly expected to apply these skills in their role:

- **Warehouse Automation Application:** Manage and drive the innovation of warehouses services, harmonising technology with warehouse operations.
- **Warehouse Space Utilisation:** Manage varying volumes of product due to different warehousing solutions, ensuring the warehouse spaces are managed efficiently
- **Warehouse Performance Measurement:** Identify key performance indicators in warehouses for optimal processes and customer relations activities, to improve efficiency, customer satisfaction and overall reduce costs for the business.

*Skills and proficiency levels are identified based on Skills Framework for Logistics

THE ROLE TODAY

This job is responsible for managing and reviewing warehouse operational policies, standards and procedures including the implementation of warehousing solutions, in accordance to warehousing business and customers' needs. Job roles and responsibilities also include managing warehousing business resources, including manpower, internal assets and external vendors.

THE ROLE TOMORROW

In the longer-term, this role will play a more critical function in strategising data-driven solutions and providing impactful business advisory. The rise in emerging technologies will benefit the performance of these professionals by managing and optimising warehouse management activities, allowing them to focus their time and effort on scaling up the business' logistical processes using big data analytics.

Changes in critical work function

Critical Work Function	Key Drivers of Change	Implications on Tasks
Drive Business Continuous Improvement	Availability of large volume of data embedded in logistics operations: • One of the most underutilised assets in the logistic industry is the **high volume of supply chain data** that can be analysed to recommend process re-engineering and other technology enhancements to improve warehouse operations efficiency. Expectations for sustainable practices: • Consumers are starting to demand socially conscious and environmentally sustainable businesses.	Job Enrichment: • The Warehouse Operations Manager will shift from managing day-to-day operations work, to reviewing and identifying ways to enhance logistics performance with greater focus on reducing social and environmental impact for the tasks undertaken. • This is complemented by applying data insights to review and drive effective warehouse operations practices, such as accurate forecasting of warehouse capacity, assessing potential delays and mitigating supply chain risks.

Critical Work Function	Key Drivers of Change	Implications on Tasks
Drive Warehouse Operations	Integrating technology solutions to warehouse operations to optimise efficiency and guide decision making: • **Artificial Intelligence and Machine Learning** to enhance on-demand capacity planning**.** • **Robotic Process Automation (RPA) such as tracking and sensors** to enable real-time tracking of shipments and minimise potential supply chain risks. • **Autonomous Robots** can replace manpower-intensive tasks that are tedious and repetitive, improving overall productivity. Constantly evolving consumer demand and integrated sales channels: • There is a multitude of sales channels available for consumers to interact with, driving complex sales and return processes. Additionally, consumers have higher expectations for convenient and free returns policy.	Augmented by Technology: • As smart warehouses are integrated with automation, it will replace repetitive tasks and reduce human errors. The **Warehouse Operations Manager will have to shift towards performing monitoring activities such as tracking and analysing productivity metrics** (e.g. inventory turnover, costs), driving improvement plans in warehouse operations performance. • The Warehouse Operations Manager will have to **manage multiple schedules for inbound and outbound delivery**, as supply chains and fulfilment activities are increasingly diversified. • The Warehouse Operations Manager will have to **collaborate with the Retail Operations, Merchandising and E-commerce teams to determine accurate forecasts of consumer demand**. These predictions will serve to inform the Warehouse Operations Manager on making advanced procurement orders for specific products. • The Warehouse Operations Manager will also have to **monitor real-time e-commerce and retail sales**, to ensure stores are replenished sufficiently to meet consumer demand. • The Warehouse Operations Manager has to **manage activities and cost implications of processing returns and organising the circular flow of inventory**.

Critical Work Function	Key Drivers of Change	Implications on Tasks
Drive Cargo/ Material Handling & Delivery Operations	Focus on Omni-channel Approach • As retailers shift towards e-commerce, there is a need to offer faster and more reliable last-mile delivery by working with external logistics partners (e.g., 3PLs) or build their own capabilities by reviewing operational capabilities and/or taking advantage of technologies.	Job Enrichment: • As retailers provide customers with more sales fulfilment options, the Warehouse Operations Manager will be **expected to manage fulfilment across the channels (e.g. e-commerce, retail stores and q-commerce) and maintain satisfactory customer experience.** • The Warehouse Operations Manager has to **ensure inventory management and delivery operations are fulfilled in an accurate and timely manner**. This includes streamlining the procurement of products, automating inventory management and providing real-time updates on delivery. The focus will shift to the constant flow of information and data that enable transparency for consumer, and easy optimisation and adaptation of processes. • The Warehouse Manager will also be **more focused on developing partnerships and collaborations with other logistics partners** as the focus shifts to continuous evolution and responsiveness to consumer demands.

190

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A closer look at how tasks would be impacted:

Critical Work Function	Existing task...	...Envisioning the new tasks
Drive Business Continuous Improvement	Review business processes improvement solutions to determine effectiveness	• Evaluate processes and data insights to identify opportunities to implement innovative practice or technology, which improve efficiency and reliability of logistics operations. • Review existing processes and practices to identify opportunities in reducing social and environmental impact, sharing quantifiable impact insights.
Drive Warehouse Operations	Determine warehouse storage system strategy using knowledge of changes in conditions, operations and the environment and its impact to outcomes	• Develop real-time warehouse operations to deliver logistics services that fulfil customer demands across multiple sales channels and are responsive to evolving consumer demands or external circumstances.
	Review warehouse strategy for alignment across different functions	• Review warehouse strategy across functions, delivery services and returns policies for the multiple sales channels to maintain service levels and consider ultimate impacts on the customer experience.
Drive Cargo/ Material Handling & Delivery Operations	Manage resources to ensure cargo-handling schedules are met	• Implement warehousing capabilities to meet dynamic schedules across different inbound delivery stakeholders. • Manage outbound delivery operations to optimise multi-channel fulfilment process and elevate the customer experience.

Upskilling of existing skills

- Warehouse Automation Application
- Warehouse Space Utilisation
- Warehouse Performance Measurement

New skills for the role

- Automated Inventory Control^
- Environmental Protection Management
- Transport Management System Administration

^Skills not in any Skills Framework

Emerging Roles in Retail

A review of the trends and scenarios also revealed that there would be new roles emerging in the retail sector. By anchoring around 2 areas of core capabilities – customer-centricity and technology innovation – 9 emerging roles were identified. These roles vary in degree of specialisation and would ultimately become critical for retailers to consider as they strive towards an increasingly competitive retail sector.

Our emerging job roles are anchored around two core capability areas:

Customer-Centricity

These roles centred on improving customer experience, supporting customer and keeping customers preferences and demands top-of-mind when planning actions and strategies.

Specialist Roles	Cross-Functional Roles
• Sustainability Specialist • Product Innovator	• Customer Experience Manager • Omni-channel Manager

Technology Innovation
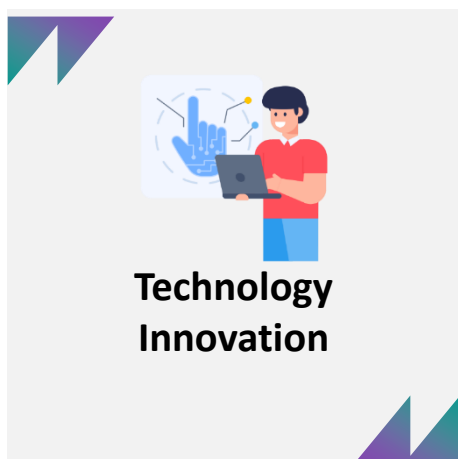
These roles utilise technology and data to optimise existing processes and improve current ways of working so as to better adapt to changing customers' expectations and new trends in the sector.

Tech-Lite		Tech-Heavy
• Digital Marketer	• Digital Transformation Manager • UI/UX Designer • Customer Intelligence Analyst	• Full Stack Developer

Note:

6.3 Emerging Job Profiles

Emerging Roles in Retail: We heard from you

To ensure job roles were relevant and applicable to the retail landscape, local retailers were engaged to share inputs and prioritise the emerging roles:

- **Emerging Roles that currently exist or considered by retailers**
- **Emerging Roles that will be incorporated into existing job roles**

The subsequent emerging job profiles provide detailed descriptions of each role for retailers to consider, and identify key tasks and skills required for employees to enhance their operational and service capabilities.

Emerging Roles that currently exist or considered by retailers

Among the 9 emerging roles introduced, these are roles that retailers would consider introducing or may have such a role in place currently. These roles are mostly technology-related roles, ranging from tech-lite roles to specialised tech-heavy roles. These roles are critical as they support digitalisation of the retail business which aligns with the sector transformation agenda.

Role	Description
Full Stack Developer	**Developing and maintaining customer-centric digital platforms from front-end user experience to backend service frameworks**, in order to support retail business and operations.
UI / UX Designer	Gathering and evaluating user requirements, in collaboration with product managers and engineers, **illustrating design ideas using story broads, process flows and sitemaps**.
Omni-channel Manager	**Integrating businesses and teams across digital and physical channels of retail**, both organically and in new markets, by **overseeing the end-to-end commercialisation and operationalisation** of the omni-channel business.
Digital Transformation Manager	**Driving, leading, and executing enterprise-wide digital and transformation strategies** for retail across different functions to accelerate the organisation on its journey to become a digital leader.
Digital Marketer	Developing **strong and innovative strategies and implementing marketing campaigns**, content marketing, virtual events, among other activities **focused on demand generation across digital platforms**.

Note:

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FULL STACK DEVELOPER

Alternative titles: Web Developer, Application Developer

OVERVIEW OF EMERGING IMPACT

Time Horizon

Immediate   Mid-term   Long-term

Key Trends driving Impact

Consumer of the Future   New Retail Model   Automation & Data   Future-proofed Supply Chain

Growth Drivers

- **Rise in digital marketplaces:** Fuelled by the global pandemic, digital channels and platforms such as web-based applications has become increasingly important to be incorporated into retailers' business operating model, companies are adapting their business model. This calls for retailers to establish or enhance brand presence in digital marketplaces. With that, this has given rise to the need for full-stack developers within the retail footprint in order to effectively develop and manage these digital channels and platforms.

KEY RESPONSIBILITIES

The Full Stack Developer is responsible for developing and maintaining customer-centric digital platforms from front-end user experience to backend service frameworks, in order to support retail business and operations. This includes the design, implementation and delivery of web and/or mobile applications. The Full Stack Developer has to constantly learn programming languages that assist in the development and maintenance of the web and/or mobile applications.

Critical Work Function	Key Tasks
Develop Customer-centric Digital Platforms	• Participate in full software development lifecycle (SDLC) – conceptualisation, design, testing, launch and aftercare support • Design overall architecture of the web applications • Collaborate closely with UX/UI team to design frontend applications using latest technologies • Develop integrations with backend APIs and external data sources • Document architectural aspects of software applications including requirements, design, implementation of the system, risks and alternative solutions • Collaborate with key stakeholders to drive key technical decisions for design, development and implementation of software

Critical Work Function	Key Tasks
Maintain customer-centric digital platforms	• Prepare test plans on System Integration Testing and User Acceptance Testing to ensure robustness and quality of applications • Perform maintenance tests to ensure quality and responsiveness of applications • Keeping up-to-date on the current developments in web development, learning about emerging concepts on full-stack development in web applications and programming languages • Identify areas of improvements and propose new development solutions to ensure functional software • Collaborate with backend developer, designers and product owners to constantly improve customer experiences within applications

Key Skills and Competencies	
Technical Skills and Competencies	**Critical Skills and Competencies**
• Agile Software Development • Application Development • Consumer Intelligence Analysis • Database Administration • Media Data Management • Mobile Apps Marketing • Programming and Coding • Software Testing • User Experience Design • User Interface Design • Website Design	• Creative Thinking • Collaboration • Digital Fluency • Problem Solving • Adaptability

OVERVIEW OF EMERGING IMPACT

Time Horizon

Immediate   Mid-term   Long-term

Key Trends driving Impact

Consumer of the Future   *New Retail Model*   *Automation & Data*   *Future-proofed Supply Chain*

Growth Drivers

- **Increased emphasis on customer-centricity:** The internet, technology, and social media has been an integral part in giving consumers greater purchasing power and higher expectations when it comes to interacting with digital products. In response to these trends, companies are doing everything they can to make sure their users' mobile and web experiences are positive ones, increasing the growth in demand for UI/UX designers

KEY RESPONSIBILITIES

The UI/UX Designer is responsible for gathering and evaluating user requirements in collaboration with product managers and engineers, testing and implementing the overall user experience on digital platforms. The UI/UX Designer ensures that elements of the online user experience are optimised for improved usability, usefulness and exceptional visual design, translating content and layout into an intuitive and responsive experience for users. The UI/UX Designer has to illustrate design ideas using story boards, process flows and sitemaps, as well as graphic user interface elements such as menus, tabs and widgets.

Critical Work Function	Key Tasks
Drive UI/UX Strategies and Solutions	- Analyse user feedback to propose improvements to enhance user experience - Develop metrics to measure customer satisfaction and loyalty across various touchpoints - Provide the iterative development of user tasks, interaction and interfaces to meet user requirements, taking into account the whole user experience - Develop communication strategies with the aim to improve the effectiveness of communication to the designer community at IT services and business IT teams

Critical Work Function	Key Tasks
Design User Experience Architecture	• Gather user requirements to enable analysis of critical needs / pain points • Design studies or research into shoppers' behaviour across target segments • Provide recommendations for user experience solutions across all touchpoints of the customer journey • Develop wireframes and task flows across various touchpoints and platforms for end-users • Collaborate with stakeholders across the retail organisation to incorporate visual or brand identity for the user experience • Design optimisation of user journeys, development of site maps and construction of wireframes

Key Skills and Competencies	
Technical Skills and Competencies	**Critical Skills and Competencies**
• Design Concepts Generation • Digital Image Production • Digital Asset and File Management • Manual and Digital Drawings Production • Typeface and Layout Production • User Interface Design • User Experience Design • UI/UX Optimisation • Visual Design and Communication Principles • Visual Collaterals Production • Website Design • Website Performance Management	• Communication • Problem Solving • Digital Fluency • Collaboration • Creative Thinking

OMNI-CHANNEL MANAGER

Alternative titles: 0-2-0 Specialist, Ecommerce Specialist

Emerging job profile

OVERVIEW OF EMERGING IMPACT

Time Horizon

Immediate	Mid-term	Long-term

Key Trends driving Impact

Consumer of the Future   *New Retail Model*   *Automation & Data*   *Future-proofed Supply Chain*

Growth Drivers

- **Rise in digital purchases:** The surge in internet traffic, introduction of new technology and availability of e-commerce drive consumers to shift towards online purchases. To ensure that there is a seamless customer journey, developing an Omni channel strategy is essential for retail businesses
- **Changing Customer Experience:** Customers are increasingly hyper-connected and informed through social networks and online communities. There is an expectation of a more customer-centric approach and increased personalisation and tailored shopping experience

KEY RESPONSIBILITIES

The Omni-Channel Manager is responsible for integrating businesses and teams across digital and physical channels of retail, both organically and in new markets, by planning and implementing projects, initiatives and elevating key decisions in line with the company strategy.

The Omni-Channel Manager ensures brand promises and experiences are consistent across digital and physical sales channels, collaborating with marketing, merchandising, retail operations and logistics teams to drive processes that cope with online and offline sales fulfilment.

Critical Work Function	Key Tasks
Embed Customer Centricity	• Develop and report on meaningful customer engagement, voice of customer and other metrics to measure progress and impact • Implement ways to improve consistency of customer experiences across various engagement and sales platform
Execute Omni-channel Strategies	• Partner with internal stakeholders to successfully deliver and roll-out omni solutions across channels • Communicate relevant metrics to track success of commercials and identify areas of opportunities to optimise performance

Mercer

OMNI-CHANNEL MANAGER

Emerging job profile

Critical Work Function	Key Tasks
Drive Omni-channel Strategies	• Develop O2O (Online-to-Offline) strategy and roadmap based on analysis of customer's interactions and behaviours on online and physical stores • Drive implementation and integration of Omni channel model to elevate customer experience • Lead strategic projects that will drive the business towards full omni-channel capabilities • Oversee the selection and roll-out of innovative technology and solutions that increase efficiencies and experience across various channels • Identify dependencies and collaborate on solution or product design across functions

Key Skills and Competencies	
Technical Skills and Competencies	**Critical Skills and Competencies**
• Automated Inventory Control^ • Business Environment Analysis • Business Risk Assessment • Communications Channel Management • Customer Feedback and Relationship Management • Customer Relationship Management • Data Analytics • Data Mining and Modelling • Database Administration • Delivery Optimisation • Demand Analysis • E-Commerce Campaign Management • Functional Analysis • Market Trend Analysis • Omni-channel Management^ • Omni-channel Strategy^ • Systems Thinking Application	• Communication • Problem Solving • Digital Fluency • Collaboration • Adaptability

^Skills not in any Skills Framework

OVERVIEW OF EMERGING IMPACT

Time Horizon

Immediate   *Mid-term*   *Long-term*

Key Trends driving Impact

Consumer of the Future   *New Retail Model*   *Automation & Data*   *Future-proofed Supply Chain*

Growth Drivers

- **Proliferation of technology:** Retailers are integrating technology across business and processes with the following objectives: Customer engagement, employee empowerment, optimising operations, and reimagining products and services. While transformation brings about considerable changes, retailers should have a change management strategy and team in place to build collaborations and can leverage the strength of key stakeholders to facilitate large-scale transformation and build through leadership.

KEY RESPONSIBILITIES

The Digital Transformation Manager is responsible for driving, leading, and executing enterprise-wide digital and transformation strategies for retail across different functions to accelerate the organisation on its journey to become a digital leader. He/she has to design and monitor the KPIs of the digital transformation roadmap across multiple retail functions (e.g. retail operations, supply chain), driving sustainable deployment of IT infrastructure that improve the efficiency of the business functions.

Critical Work Function	Key Tasks
Drive Digital Innovation	• Partner with key stakeholders to define and implement digital roadmap and solutions with the objective to scale existing or add new initiatives • Evaluate the retail ecosystem and digital tools, identifying areas of opportunities to bridge the gap between online and in-store retail services and operations • Research on the current digital solutions available in the retail ecosystem, evaluating the effectiveness of the solutions on meeting the needs of the business • Forecast workload, costs, planning impacts with retail integrator and suppliers (e.g. software & hardware)

Mercer

DIGITAL TRANSFORMATION MANAGER

Emerging job profile

Critical Work Function	Key Tasks
Drive Digital Integration and Change Management	• Partner with teams across the retail functions to implement digital projects • Lead the technical transformation of the retail functions, emphasising on the balance between engineering excellence, time-to-market, and building a system that supports the future vision in mind. • Drive change management processes and ensure users' adoption of new digital capabilities • Contribute ideas, proposals and actions to conduct engaging upskilling initiatives to drive digital culture in the company and empower employees to work with enabling technology

Key Skills and Competencies	
Technical Skills and Competencies	**Critical Skills and Competencies**
• Business Environment Analysis • Business Intelligence and Data Analytics • Data Analytics • Database Administration • Demand Analysis • Technology Adoption and Innovation • Manage Change • Market Profiling • Market Trend Analysis • Omni-channel Strategy^ • Organisational Planning and Target setting • Organisational Strategy Formulation • Project After Action Review • Project Integration • Project Quality	• Communication • Problem Solving • Digital Fluency • Learning Agility • Adaptability

^Skills not in any Skills Framework

OVERVIEW OF EMERGING IMPACT

Time Horizon

Immediate	Mid-term	Long-term

Key Trends driving Impact

- Consumer of the Future
- New Retail Model
- Automation & Data
- Future-proofed Supply Chain

Growth Drivers

- **Proliferation of technology:** As technology evolves and new forms of marketing arises and becomes increasingly available, marketing could be expected to be broken down into 2 distinct skillsets and responsibilities: physical and digital.
- **Evolving digital media channels and regulations:** Emerging formats of social media platforms and evolving media regulations on consumer data are driving the need to keep updated in order to remain market competitive.

KEY RESPONSIBILITIES

The Digital Marketer is responsible for developing strong and innovative strategies and implementing marketing campaigns, content marketing, virtual events, webinars, paid and organic social media, among other activities focused on demand generation across digital platforms. The Digital Marketer has to keep updated with the latest trends and regulations on consumer data management, to inform on the implementation of new marketing technologies (e.g. web analytics tools) that optimise digital marketing campaigns.

Critical Work Function	Key Tasks
Measure Performance	• Measure performance of digital marketing campaigns to create reports on impact and findings • Analyse results of launched initiatives to drive improvements through scalable, efficient new processes to optimise resources and results • Evaluate emerging technologies and thought leadership to identify areas of improvement

202

Critical Work Function	Key Tasks
Drive Digital Marketing Activities	• Plan and execute all digital marketing, including SEO/SEM, marketing database, email, social media and display advertising campaigns across different target segments • Coordinate marketing activities across various digital channels and programs to design and implement a digital marketing strategy that positively impacts growth throughout customer acquisition and nurturing • Drive social media marketing strategy and campaign by creating the content ideas, budget planning, and implementation schedules • Optimise marketing content for website and social networking channels such as Facebook, Twitter, Instagram, Google Plus • Identify new and creative digital marketing growth strategies • Spearhead collaboration and partnerships with key stakeholders to ensure implementation and outreach of marketing campaigns

Key Skills and Competencies		
Technical Skills and Competencies		**Critical Skills and Competencies**
• Affiliate Marketing • Brand Campaign Management • Business Environment Analysis • Brand Storytelling^ • Business Operational Planning • Business Opportunities Development • Business Performance Management • Consumer Intelligence Analysis • Customer Behaviour Analysis • Customer Loyalty and Retention Strategy Formulation • Digital Asset and File Management • Data Analytics • Digital Marketing and Communication^	• E-commerce Campaign Management • Infographics and Data Visualisation • Marketing Communications Plan Development • Organisational Planning and Target Setting • Omni-channel Strategy^ • Search Engine Optimisation (SEO) • Social Media Marketing • Sponsorship Management • Website Design • Visual Design and Communication Principles	• Collaboration • Communication • Digital Fluency • Decision Making • Problem Solving

^Skills not in any Skills Framework

Emerging Roles that will be <u>incorporated into existing job roles</u>

Some emerging roles are considered 'good-to-have' for retailers. In other words, some retailers do not foresee creating a dedicated role to perform some of these activities. Instead, an option would be to integrate elements from emerging roles into existing job roles. Retailers shared potential adjacent job functions where roles may be incorporated to take on these responsibilities.

Role	Description	Adjacent job roles[1]
Product Innovator	**Manages the process of planning, developing and presenting** products or enhancing existing products in order to meet customer expectations effectively, taking into consideration current and future needs.	• Merchandising Executive • Merchandising Manager • Business Owner
Sustainability Specialist	They are responsible for **spearheading the design and integration of the retailer's vision and initiatives** regarding environmental and social impact (ESG). They review existing business practices, products, and services, **identifying potential areas of change for sustainability transformation**.	• Merchandising Executive • Merchandising Manager • Business Owner
Customer Experience Manager	They are **focused on defining holistic solutions for defined customer groups**, and **leading cross-functional, customer-centric integration**.	• Store Manager • Retail Operations Director • E-commerce Manager • Business Owner
Customer Intelligence Analyst	They **apply their knowledge of data processing software and business development strategies** to provide sound business decisions to company executives, based on KPIs to determine the success of business initiatives.	• Brand Executive • Marketing Executive

Note:
1 – Particularly among small and medium enterprises, retailers had suggested that these job roles may be incorporated as part of the job role of business owners

OVERVIEW OF EMERGING IMPACT

Time Horizon

Immediate   *Mid-term*   *Long-term*

Key Trends driving Impact

Consumer of the Future   *New Retail Model*   *Automation & Data*   *Future-proofed Supply Chain*

Growth Drivers

- **The increased specialisation of product roles:** Fueled by technology and innovation, retailers start to focus on investments in dedicated areas such as personalisation of products and services, platform components, enterprise, growth, mobile, and operations. In turn, the demand for a product specialist is also expected to increase as businesses expand their product focus to establish an edge over their competitors.
- **Proliferation of technology, data and insights:** The availability of assets and associated insights into shoppers' behaviours that did not exist previously, are transforming the innovation game within retail. As resources and technology become more available to better align product development and offerings to current and future customer trends, needs and wants, there would be an increased emphasis in driving innovation and unlocking opportunities in the area of product development, all the way to its eventual launch.

KEY RESPONSIBILITIES

The Product Innovator manages the process of planning, developing and presenting products or enhancing existing products in order to meet customer expectations effectively, taking into consideration current and future needs. This includes conducting research, developing proposals and supervising the design processes. The Product Innovator has to ensure that products, packaging and processes meet the required technical, quality and regulatory standards while satisfying customers' evolving needs.

Critical Work Function	Key Tasks
Uncover Innovation Opportunities	• Conduct consumer and market research to generate insights and identify new opportunities for product development • Conceptualise new products or innovate existing products across product lines to attract new markets • Develop long-term vision and goals that inform overall innovation strategies across the portfolio of products • Recommend potential improvements across product development processes
Drive Product Development and Launch	• Lead the design and development of creative and customer-centric products • Define product strategy from development to product launch, prioritising features, building consensus • Collaborate with cross-functional teams, taking products from conceptualisation through production stages • Coordinate new product releases through internal and/or external communications and vendors • Devise innovative solutions to overcome design and cost limitations

Key Skills and Competencies	
Technical Skills and Competencies	**Critical Skills and Competencies**
• Category Management • Customer Experience Management • Market Research • Market Trend Analysis • Product Costing and Pricing • Product Design and Development • Product Performance Management • Product Styling • Quality Assurance	• Communication • Problem-solving • Collaboration • Creative Thinking • Adaptability

OVERVIEW OF EMERGING IMPACT

Time Horizon

Immediate   Mid-term   Long-term

Key Trends driving Impact

Consumer of the Future   *New Retail Model*   *Automation & Data*   *Future-proofed Supply Chain*

Growth Drivers

- **Evolving customers' expectations:** As the public grows increasingly concerned about the impacts of consumerism on the environment, there will be increasing demands placed on environmental conversation and protection across retail activities and processes. Businesses are expected to continue embedding sustainability considerations across their processes to minimise the impact of their operations on the environment.

KEY RESPONSIBILITIES

The Sustainability Specialist will be responsible for spearheading the design and integration of the retailer's vision and initiatives in the area of social and environmental impact (ESG). This will include reviewing existing business practices, products, and services and identifying potential areas of change for sustainability transformation. The Sustainability Specialist maintains a positive brand image on sustainability, examining ways to cost effectively implement sustainability initiatives.

Critical Work Function	Key Tasks
Define Priority Areas for Sustainability	• Collaborate with key stakeholders across retail functions to define a clear sustainability agenda and embed priorities throughout the entire organisation • Support sustainability standards and goals by providing sustainability expertise and creating change in the organisation's frameworks, principles and guidelines • Identify sustainability opportunities and challenges, including existing and future trends • Integrate a sustainability lens into company's operations and goals across various retail functions • Analyse full market potential, risk assessment and mitigation for new and existing markets in relation to sustainability

Critical Work Function	Key Tasks
Drive Sustainability Transformation	• Define and track key quantitative and qualitative metrics to actively track and report on environmental and social impact • Drive internal communications, create buy-in and alignment across all relevant departments • Drive effective cross-departmental project and stakeholder managements to integrate sustainability considerations into retail activities and processes • Champion and promote sustainability and impact within and outside the organisation
Uncover Areas of Opportunity	• Analyse the market potential, risk assessment and mitigation for new and existing markets or new areas of work in relation to sustainability • Review existing business practices, processes, products and services and identify areas of opportunities and new ways of working by embedding sustainability considerations and principles

Key Skills and Competencies	
Technical Skills and Competencies	**Critical Skills and Competencies**
• Business Performance Management • Business Continuity Planning • Business Relationship Building • Brand Storytelling^ • Carbon Footprint Management • Environmental Protection Management • Manage Change • Organisation Evaluation for Business Excellence • Project Management • Policy Implementation and Revision • Project Feasibility • Project Integration • Project Administration • Stakeholder Management • Service Planning & Implementation	• Communication • Problem-solving • Collaboration • Adaptability • Global Perspective

^Skills not in any Skills Framework

CUSTOMER EXPERIENCE MANAGER

Alternative titles: Customer Service Manager, Customer Success Manager

Emerging job profile

OVERVIEW OF IMPACT TO THE ROLE

Time Horizon

Immediate   Mid-term   Long-term

Key Trends driving Impact

- Consumer of the Future
- New Retail Model
- *Automation & Data*
- *Future-proofed Supply Chain*

Growth Drivers

- **Competition in the retail industry:** The retail industry is becoming more competitive than ever, fuelled by factors such as non-traditional competitors, innovative start-ups and new operating models and digital-physical experiences by international and local players. Retailers will need to be well-equipped to keep pace with evolving and changing customer behaviours, to inspire customer and brand loyalty by bringing customer-centricity to life.

- **Increased emphasis on consistency and alignment of customer experience across the retail operating model:** While customer service is highly important in retail, retailers currently have disparate functions managing different points of accountability of the customer experiences. As retailers start to focus on delivering a cohesive and holistic customer solution to address evolving customer demands at scale and pace, they need to break down silos and tie together these disparate functions. This gives rise to a need for a single-point accountability within organisations to better integrate customer-focused efforts aligned to consumers' needs and behaviours throughout the end-end retail value chain.

KEY RESPONSIBILITIES

The Customer Experience Manager will serve as a strategic and supportive partner across every touchpoint of the customer purchase process. They are focused on defining holistic solutions for defined customer groups. This includes spearheading cross-functional, customer-centric integration across functional initiatives such as marketing strategies and supply chain implementation.

The role of a Customer Experience Manager will expand beyond customer servicing to take on other responsibilities like customer engagement, success and empowerment. The Customer Experience Manager will have to manage feedback from online and offline channels, and address customer pain points together with the relevant departments. This will include leveraging on data analytics to comprehend the changing customer needs, as well as proactively ideating strategies to address them.

CUSTOMER EXPERIENCE MANAGER

Emerging job profile

Critical Work Function	Key Tasks
Drive Customer Strategies and Solutions	• Identify customer expectations and needs across various touchpoints of the customer journey • Embed effective customer engagement strategies such as hyper-personalisation within touchpoints to ensure seamless and customised experience for each customer • Define key performance indicators that effectively measure customer satisfaction across different customer segments and personas • Collaborate across retail functions and spearhead integration of cross-functional customer experience and management planning and execution across the full customer journey • Provide guidance to various stakeholders in managing customer solutions by providing timely and effective solutions and query resolutions • Develop change management processes that build the skills and mindsets required for a customer-centric culture across the organisation
Drive Data-driven and Customer-focused Insights	• Conduct analysis using internal or external data to drive understanding of consumer behaviors, demographics and needs • Collect voice-of-customer data across online and offline channels to inform strategies and innovation efforts in the area of customer experience • Establish feedback platforms to generate insights on potential process improvement opportunities • Present customer experience insights data to various retail functions to align and enhance experience across the various consumer touchpoints.

Key Skills and Competencies	
Technical Skills and Competencies	**Critical Skills and Competencies**
• After-sales Service	• Communication
• Conflict Management	• Customer Orientation
• Customer Acquisition Management	• Problem Solving
• Customer Experience Management	• Adaptability
• Customer Feedback and Relationship Management	• Digital Fluency
• Customer Loyalty	
• Customer Loyalty and Retention Strategy Formulation	
• Customer Relationship Management	
• Omni-channel Strategy^	
• People and Relationship Management	
• Product Advisory	
• Product Demonstration	
• Service Brand	
• Service Challenges	
• Service Coaching	
• Service Excellence	
• Service Information and Results	
• Service Innovation Culture	
• Service Leadership	
• Service Partnerships	
• Service Planning and Implementation	
• Stakeholder Management	

^Skills not in any Skills Framework

CUSTOMER INTELLIGENCE ANALYST

Alternative titles: Data Analyst, Business Analyst, Strategic Insights Analyst

Emerging job profile

OVERVIEW OF EMERGING IMPACT

Time Horizon

Immediate   Mid-term   Long-term

Key Trends driving Impact

Consumer of the Future   *New Retail Model*   *Automation & Data*   *Future-proofed Supply Chain*

Growth Drivers

- **Changing Business Landscape:** Retail landscape has become increasingly competitive with local and international players of different scales with different channels. This drives the demand for business intelligence services as companies need to find opportunities and use resources more efficiently.
- **Availability of Big Data:** Variety of sources of data which could be analysed to provide insights on consumer behaviours and preferences that can shape company's strategic decisions
- **Data-Driven Decision-Making:** Increasing use of data and market research to understand needs and wants of customers, identify factors driving demand and make sound business decisions based on data insights.

KEY RESPONSIBILITIES

The Customer Intelligence Analyst is responsible for using their knowledge of data processing software and business development strategies to provide sound business decisions to company executives. The Customer Intelligence Analyst collaborates with data professionals to extract data figures, creating reports based on their findings, and monitoring KPIs to determine the success of business initiatives.

Critical Work Function	Key Tasks
Conduct Data and Customer Analysis	• Conduct research on the competitors' price, sales and marketing strategies to determine the company's unique value proposition. • Analyse large, complex data sets on sales revenue and cost data to address strategic and operational business questions • Implement data programming languages to conduct analysis and synthesise meaningful insights on KPIs of business processes (e.g. sales volume, fulfilment rate) • Propose recommendations on the development of strategies and action plans • Coordinate and work with departments, using data to drive continuous improvement in their products

Critical Work Function	Key Tasks
Generate Customer Insights	• Produce financial and market intelligence by querying data repositories and generating periodic reports • Responsible for daily forecasting, analysing of the e-commerce platform operations, generate operation analysis reports, provide conclusions and suggestions to various departments. • Integrate and prepare datasets, organising data to a format that can be analysed and managed • Build and evaluate data models using statistical, algorithmic, mining, and visualisation for data discovery and analysis

Key Skills and Competencies	
Technical Skills and Competencies	**Critical Skills and Competencies**
• Artificial Intelligence Application • Business Risk Assessment • Business Environment Analysis • Customer Relationship Management (CRM) • Data-Mining and Modelling • Demand Analysis • Delivery Optimisation • Data Analytics • Database Administration • Functional Analysis • Infographics and Data Visualisation • Market Research • Market Trend Analysis • Market Profiling • Programming and Coding • Systems Thinking Application	• Sense Making • Problem Solving • Digital Fluency • Collaboration • Adaptability

Skills currently not in the Skills Framework

The skills across the Skill Frameworks were reviewed, and emerging skills supporting the new job tasks were established. The 6 skills identified that are currently not found in any Skills Framework would be relevant in supporting the ongoing transformations within the job tasks across the retail sector, enabling incumbents across the retail value chain to design, implement and review new processes.

Emerging Skill	Skill Description
Automated Inventory Control	Collaborate with IT teams to support the development and implementation of automated inventory tasks (e.g. monitoring of stock control and replenishment, managing receipt, dispatch and storage of merchandise)
Brand Storytelling	Formulate key themes and messages that develop an emotional resonance among the target audience, driving an innovative compelling and effective narrative in order to increase brand awareness and loyalty
Digital Marketing and Communication	Leverage on various digital channels to communicate contextual and targeted messaging based on real-time consumer insights
In-Store Digital Application and Assistance	Guide customers through the digital touchpoints in-store, helping to resolve issues as customers interact with the digital tools
Omni-channel Management	Implement processes that integrate fulfilment activities across sales channels, providing a seamless experience for customers and employees
Omni-channel Strategy	Design processes that integrate fulfilment activities across sales channels, providing a seamless experience for customers and employees

Note:

7

THE WAY FORWARD

7.1	Productivity Reimagined
7.2	'Going Global' initiatives
7.3	Human Capital Development Plans

Recommendations for the Retail Sector

Given key challenges faced by the sector…

Transformation fatigue

Perceptions of the retail sector EVP

Manpower shortage and reskilling challenges

…the trends driving growth and the need for transformation

1
Consumer of the future

2
New retail model

3
Automation & data

4
Future-proofed supply chain

…and the key thrusts of sector strategies for the future

Build global brands & support internationalisation

Rejuvenate retail through new experiential concepts & innovations

Strengthen Singapore's position as a vibrant lifestyle hub for global brands

Step up jobs and skills and transformation and create quality roles for locals

We have proposed three overall categories of recommendations for retailers and government agencies which would enable sustainable transformation in the retail sector
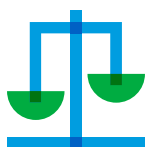
Productivity reimagined

'Going Global' initiatives

Human capital development plans

7.1 Productivity Reimagined

Trends are redefining what productivity means for the sector

As the retail sector continues to evolve, retailers have to drive greater productivity, translating limited resources into greater and more efficient profit margins. Retailers are armed with greater wealth of data and information of their business, and are required to identify effective metrics that measure real and effective growth, to justify the changes and improve operational requirements of the business.

Data collection & tracking

The retail sector began improving productivity through data-driven decisions, collating key metrics to drive business decisions:

Example of business metrics:
- Sales/revenue
- Sales volume
- Time taken per transaction

Siloed measures of productivity

Existing manpower productivity metrics focus on individual contributions towards transactional activities in silos. These metrics were effective in identifying success in business and digital transformations:

Example of siloed productivity metrics:
- Staff deployment per square foot
- Sales per employee
- Time savings per transaction

Multi-faceted, integrated metrics of tomorrow

Emerging trends in the retail sector means that retailers have to adopt a more holistic view to understand how they are currently operating and how to improve their operations, **going beyond measuring productivity to measure performance.**

SEPHORA: Adapting ways to measure of success based on evolving trends

SEPHORA

HOW SATISFIED IS THE CLIENT?

Consumers are changing their purchasing behaviours and expect retailers to adapt to adapt to their end-to-end shopping journey. Sephora was quick to recognise the expectations of **Consumer of the Future** and instead of merely focusing on the typical business indicators, the beauty retailer decided to **redefine the way they measure success** to look at **overall customer satisfaction** as the key indicator of performance[1].

Note:
1 – How To Make A Great Loyalty Program Even Better? Sephora Has The Answer, Forbes (2020)

Key principles when identifying metrics to use

Hence, retailers will have to reassess ways in which they measure productivity and performance. While there are multitude of ways to measure productivity and performance, there are a few guiding principles that retailers could rely on when identifying which metrics best meet their needs.

COMPREHENSIVE

Metrics need to cover different components of the business, including sales, manpower and resources, customer experience and process metrics.

APPLICABLE

Metrics should be able to apply to largely apply for most business models to allow for comparison and benchmarking.

PURPOSEFUL

Metrics need to be clearly defined, in terms of rationale for measuring, intended outcomes of this metrics and how it affect not just financial of the business but other components of the business.

OPERATIONAL
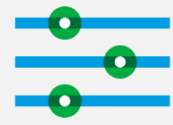
Metrics should be useful in informing business decisions and easily translated into actionable insights for retailers.

7.1 Productivity Reimagined

Proposed Metrics

Retailers of the future are maintaining business agility while achieving optimal efficiency in their business; they adopt a suite of tailored and distinct productivity tools that align with their evolving business objectives. Now, retailers need to consider several key productivity and performance metrics that are relevant to the business priorities, and shift based on evolving business objectives and challenges.

Manpower	Sales	Customer Experience	Transformation
Staff deployment per sq ft of store space	Sales conversion rate	Customer Retention Rate	Returns on digital investment
Staffing ratios (FOH vs. BOH)	Average transaction value	Customer Satisfaction Score	Digital Adoption Rate
Proportion of manpower cost to total cost	Sell-through rate	Online first response time	
Training Return on Investment	Customer Lifecycle value	Customer Promoter Score	
Sales per employee	Average Basket Size	Click-through rate	
Orders processed per employee per day	Relative sales across channels	Social Media Channel Engagement	
	Gross Margin Return on Investment		
	Inventory Turnover Rate		
	Return Rate / Refunds Requested		
	Return on Ad Spend		
	YoY Revenue Growth		

7.1 Productivity Reimagined

Manpower		
	Staff Deployment per Sq Ft of Store Space	**Staffing Ratio (FOH vs. BOH)**	**Proportion of Manpower Cost to Total Cost**
Description	Measures the number of staff situated per square foot of store space.	Measures ratio of number of front-of-house (FOH) staff to number of back-of-house (BOH) staff.	Measures the overall manpower cost (including wages, bonuses, trainings, benefits) to the total cost incurred by the business.
Purpose	Measures how effectively retailers are deploying their manpower for store operations. This can assist employment decisions when it comes to hiring, scheduling and making compensation decisions.	Assess if headcount is distributed adequately across to support both FOH and BOH operations.	Determines the price that company pays for manpower. This metric inform hiring and other talent development decisions (e.g., training expenditure).
Measurement Index	$= \dfrac{no.\,of\,staff\,deployed}{square\,feet\,of\,store\,space}$	$= \dfrac{no.\,of\,FOH\,staff}{no.\,of\,BOH\,staff}$	$= \dfrac{total\,manpower\,cost}{total\,cost}$ Total manpower cost should include all components of payroll such as wages, bonuses, overtime pay, payroll taxes, benefits and sick and vacation time.
Analysis factors	This metric could be analysed for the entire retail organisation within a given period of time (e.g., 1 year) or for particular stores in certain locations to determine if resources are allocated adequately.	This ratio could be applied across different regions (e.g., comparing town with heartland stores) to assess staffing requirements.	This metric should be used for comparison against similar companies – in terms of size, nature of business, industry and growth stage as ratio may vary for different profile of companies.

Manpower		

	Training Return on Investment	**Sales Per Employee**	**Orders processed per employee per day**
Description	Measures how much an organisation gains from its investment in training.	Measure amount of sales revenue each employee generates for the organisation.	Measures the flow and productivity of preparation of orders to customer fulfilment.
Purpose	Measures success of training initiatives or programs in meeting defined business outcomes (e.g., sales, customer satisfaction level) to determine suitability of training types.	Measures how efficient a company is in utilising its employee to generate sales. It indicates if a company is able to do more with fewer employees, translating into healthy profit margins.	Assess company's ability to accurately merchandise and plan for products and execute omni-channel fulfilment efficiently from processing of orders to fulfilment of orders.
Measurement Index	$$= \frac{(Net\ benefit - Total\ Training\ Cost)}{Total\ Training\ Cost}$$ Net benefit: to be defined and to be assessed before and after training (e.g,. Revenue increment) Total Training Cost: total cost of training includes material cost, cost of facilitation and time away from work.	$$= \frac{Annual\ Sales}{Annual\ Headcount}$$	$$= \frac{Orders\ processed\ per\ day}{No.\ of\ employees}$$
Analysis factors	This metric could be compared across different training types or employees segments. Insights could be used to determine if certain training platforms are more suitable for specific employee segments.	This metric should be used for comparison with other companies of similar size, growth stage and nature of business as it differs significantly across sector.	This metric should be used for comparison with other companies from the same industry with similar business operations model (e.g., omni-channel/pure play). Analysing this data across time will provide insights on enhancement in operation efficiency.

Sales		
	Sales Conversion Rate	**Average Transaction Value**	**Sell-through Rate**

	Sales Conversion Rate	**Average Transaction Value**	**Sell-through Rate**
Description	Measures the number of converted sales out of the number of qualified leads.	Measures the average amount that customers spend on each transaction or purchase for a given time period.	Percentage of units sold against the number of units that were available to be sold for a given time period.
Purpose	Assess effectiveness of sales approach in converting leads into actual sales as well as determining the quality of leads. This metric could be applied to both brick-and-mortar (e.g., sales team) or online sales platform.	Assess effectiveness of current product mix, pricing strategy as well as relative performance of various sales channels.	Measure sales productivity across different stores and how long it takes for specific products to sell. This metric enables companies to analyse product performance and determine optimal product category mix.
Measurement Index	$= \dfrac{No.\,of\,leads\,converted}{Total\,no.\,of\,leads} * 100$	$= \dfrac{Total\,Revenue}{No.\,of\,transactions\,within\,a\,period}$	$= \dfrac{units\,sold}{initial\,inventory} * 100$
Analysis factors	This metric should be analysed in accordance with historical data as well as across different time periods. Data could also be further segmented into location and sales channel.	This metric could be analysed across sales channels and locations to determine if there are certain platforms or regions or time periods where customers are buying more or making larger quantum purchases.	This metric would be most useful when analysed by products or product lines to show insights into which products are selling well and which products are slow to sell. When analysed across time, this metric could also provide insights on customer purchasing trends (e.g., seasonal peak in demand).

	Sales		
	Customer Lifetime Value (CLV)	**Average Basket Size (ABS)**	**Relative Sales Across Channels**
Description	Measures the total predictable revenue business can expect from a single customer.	Measures the average number of items sold per single transaction.	Compares the amount of revenue generated from brick-and-mortar stores to that of online sales channel.
Purpose	Identify high-value customer segments to prioritise, leading to more tailored marketing and sales activities to acquire and retain these segments.	Assess inventory performance over time by informing how many units are being sold and how much to restock. ABS also enables company to track particular customer base and basket size.	Compare effectiveness of online and brick-and-mortar sales channel in generating revenue. Retailers could use this metric to track channel's performance across time and inform sales strategy.
Measurement Index	$$= \frac{\substack{Average\ revenue \\ per\ customer \\ *\ Gross\ Margin}}{Churn\ Rate}$$ Churn rate: discontinued revenue attributed to existing customers that are no longer expected to remain customers	$$= \frac{Total\ no.\ of\ units\ sold}{Total\ no.\ of\ transactions}$$	$$= \frac{Revenue\ generated\ online}{\substack{Revenue \\ generated\ in \\ brick-and-mortar \\ stores}}$$
Analysis factors	This metric could be analysed across different customer segments to identify most profitable and least profitable customer bases.	This metric could be analysed across different sales channel to determine if customers are more likely to purchase more online or in-store.	This metric should be analysed across time to determine shift in consumer patterns. Also, it could be further segmented into different types of brick-and-mortar (e.g., concept stores) or online stores (e.g., webstore or 3rd party marketplace) to determine relative sales performance.

	Sales		
	Gross Margin Return on Investment (GMROI)	**Inventory Turnover Rate**	**Product Return Rate**
Description	Measures the profit return on the funds invested in inventory.	Measures the amount of times a company has sold and replaced inventory during a given period.	Measures the rate at which shipped items are returned to retailers.
Purpose	Measure the amount of revenue for every dollar invested in inventory. Identify which stocks are profitable and drive decisions on whether specific products or categories are worth replenishing / stocking up.	Determines how efficiently a company uses its inventory or replaces inventory relative to its cost of sales. Generally, a low turnover may be a sign of overstocking while a high inventory turnover ratio suggest strong sales.	Identify which products are not meeting customers' satisfaction. This metric is used to understand reasons for returns and uncover ways to reduce refunds and encourage exchanges.
Measurement Index	$$= \frac{Gross\ Profit}{Average\ Inventory\ Value}$$ Average inventory value: summation of the ending inventory value over a specified period and then dividing the sum by the number of periods.	$$= \frac{Cost\ of\ Goods\ Sold}{Average\ Inventory\ Value}$$ Cost of Goods Sold (COGS): refers to the cost of sales Average inventory value: summation of the ending inventory value over a specified period and then dividing the sum by the number of periods.	$$= \frac{Returned\ Products\ in\ a\ time\ period}{Toal\ products\ ordered\ in\ the\ same\ time\ period} * 100$$
Analysis factors	This metric could be analysed across products or categories as well as across geographical locations to determine effectiveness of inventory controls in stores.	This metric should be compared for similar companies as the ratio varies widely by industry. It is also recommended to perform deeper analysis on this ratio to understand the root cause as a high inventory turnover could also suggest insufficient stocking.	This metric should be analysed across products or categories to determine product performance and inform merchandising decisions.

	Sales	
	Return on Ad Spend	**YoY Revenue Growth**
Description	Measures the revenue generated compared to every dollar of an advertising campaign.	Measures the company's recent revenue with past year's revenue for the same month.
Purpose	Used in digital marketing and e-commerce business to evaluate the effectiveness of a marketing campaign. Used to assess performance of marketing campaigns and identify ways to improve marketing spend.	Compare current revenue performance against the previous period to track health of the business. This could be calculated for quarterly or annually. Considered more informative than month-to-month comparison which may reflect seasonal trends.
Measurement Index	$$= \frac{Revenue\ Generated\ by\ Ads}{Cost\ of\ Ads}$$	$$= \frac{Current\ Period\ Revenue - Previous\ Period\ Revenue}{Previous\ Period\ Revenue} * 100$$
Analysis factors	This metric needs to be further analysed with quantitative data to understand which element of marketing or advertisement efforts need to be improved. To evaluate the effectiveness of the advertisements, this metric could be analysed across time, geography and sales channels.	This metric could be analysed based on specific time point (e.g., peak demand season during holiday) to obtain an objective assessment.

	Customer Experience		
	Customer Satisfaction Score (CSAT)	**Customer Retention Rate**	**Online first response time**
Description	CSAT surveys provide a quantitative metric of how satisfied customers are, as well as qualitative feedback that explains reasons for satisfaction.	Percentage of returning customers across a certain time period.	Average duration for a customer to receive an initial reply after the customer submits a case.
Purpose	Questionnaires can be customised based on business objectives to find out customers' feedback.	Measures growth of the brand, as the number of customers returning to the store to purchase a product serves as a proxy for customer service, product proxy and loyalty.	Customers' trust and build rapport with retailers that provide quick first response time. Tracking and sharing response times of customer service teams with the customers can help manage their service expectations.
Measurement Index	$= Average\ (CSAT\ score)$ On a scale of 1 to 5, customers rate their satisfaction levels across various platforms. Variations in questionnaire are available	$= \dfrac{CE - CN}{CS} * 100$ CE: Number of customers at the end of the period CN: Number of new customers during the period CS: Number of customers at start of period	$= \dfrac{sum\ of\ first\ response\ time}{no.\ of\ customers}$
Analysis factors	Compared against different sales channels, product types and age demographics to determine satisfaction in various customer segments	Factors such as product segments and time periods (e.g. 90 days, 6 months) help identify and understand different customer purchasing behaviours.	Response time can be further analysed based on the number of manpower available, to provide accurate estimates on lead time

| 7.1 | **Productivity Reimagined** |

Customer Experience

	Customer Promoter Score	Click-through Rate	Social Media Engagement Rate
Description	Measures loyalty of customers to a company. There are 3 categories in NPS score: • Promoters (score 9-10) are loyal and enthusiastic customers • Passives (score 7-8) are satisfied customers • Detractors (score 0-6) are unsatisfied and unlikely to repurchase.	Measures the proportion of individuals who see an online advertisement and subsequently click on it.	Measures the percentage of people who choose to interact (e.g., likes, share, comment) with content after seeing it (i.e., reach).
Purpose	Correlating NPS with business outcomes such as revenue, customer retention and referrals. Differentiate customer segments and tailor marketing and sales approach.	Assesses how effective an advertisement has been in capturing attention and generating interest. It can be used to gauge the effectiveness of keywords and advertisement targeting.	Measures effectiveness of a social media campaign in gaining awareness and encouraging audience to get involved in the content which could convert into potential sales leads.
Measurement Index	$= \%\ of\ Promoters$ $- \%\ Of\ Detractors$ Customers to rate the company on a scale of 1-10 on how likely would they recommend the company or product / service to a friend or colleague.	$= \dfrac{Total\ Clicks}{Total\ Ad\ Impressions}$ $* 100$	$= \dfrac{Total\ no.\ of\ engagements}{Reach\ per\ post}$ $* 100$ Reach per post: total number of people who saw a particular post.
Analysis factors	NPS could be compared across time, location and customer segments. This provide insights on whether any particular groups are not being engaged by the company.	CTR could be analysed at different time period (e.g., weekday vs. weekend), across different advertising platforms and for different demographic groups.	Analysed across various platforms including social media sites or e-commerce platforms, as well as across various demographic groups to determine their effectiveness in generating interest and awareness.

7.1 Productivity Reimagined

Transformation

	Return on Digital Investment	Digital Adoption Rate
Description	Measures the gains generated from digital investment by comparing key business metrics before and after digital investments.	Measures the number of active users compared to the number of total users.
Purpose	Assess whether a digital investment is worth pursuing and ability to compare potential returns of different investments and make informed decision about allocating resources.	Assess whether users are adjusting to new products, platforms or particular features. Low adoption rate could indicate that features or platforms are not intuitive or relevant for users.
Measurement Index	$$= \frac{Current\ Performance - Previous\ Performance}{Previous\ Performance}$$ The expected performance indicator should be aligned beforehand. It could include, increasing revenue, enhancing productivity or improve time to market.	$$= \frac{Number\ of\ Active\ users}{Number\ of\ Total\ Users} * 100$$
Analysis factors	This metric should be continually tracked and analysed across several time period. For digital tools or technology, it may take time before the full benefits are reaped (e.g., may take time for users to learn to adapt to the platform). The metric could also be analysed across different geography and determine if more change management efforts will be needed for particular regions.	This metric could be further analysed in multiple ways. For instance, company could analyse the depth of adoption as measured by frequency of login per active users which reveals ease of use and stickiness of digital platforms. Company could also look at the duration of usage to understand the length of time users stay engaged with particular feature to understand if the feature is worth retaining. Another lens would be to analyse usage across different demographic groups to identify if certain features appeal greatly to particular groups.

Importance of HR in Retail Productivity

Revitalising HR to achieve a sustainable retail workforce

Across the retail sector, **talent serves as a key driver in achieving business objectives**, as they possess relevant and critical skills required to drive efficient operations. **Hence, HR plays a crucial role in ensuring talent remain motivated and engaged in their organisation, while addressing gaps between current and projected workforce requirements.** HR leaders and teams need to embark on a discovery journey to evaluate the aspects of HR, and implement new processes and productivity measures to resolve potential manpower issues.

Talent

Drive demand and supply of skills that support business operations

Business Objectives

Develop a thriving and engaged workforce to drive talent retention

Drive strategic workforce investments to meet future workforce requirements

HR
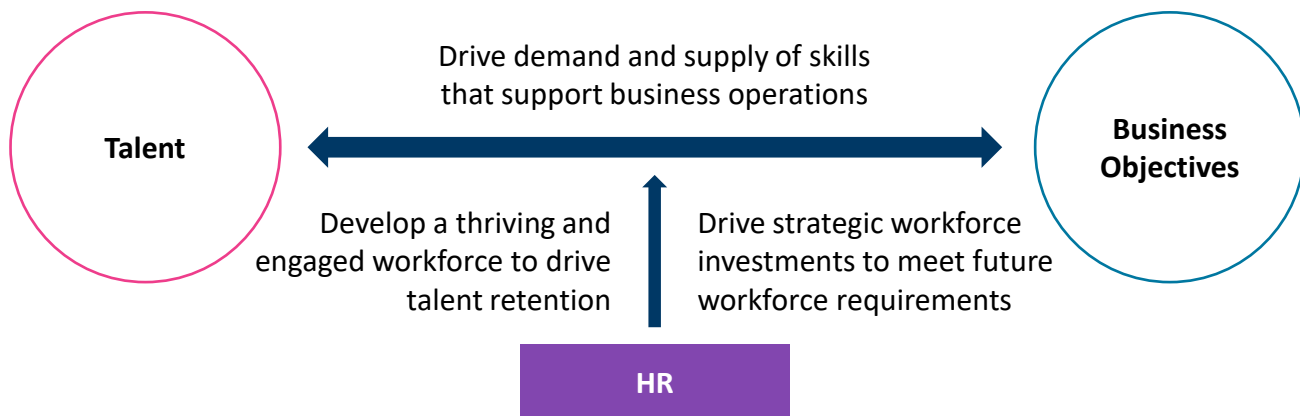
Factors critical for success in retail:

Among global and Singapore retailers, HR leaders are shifting their priorities towards developing a compelling **employee experience** to motivate and retain employees in their organisation, as well as **drive strategic workforce plans to enhance productivity**.

They are doing so by **redesigning work, identifying relevant existing and future skills**, and **adopting new agile HR practices** that would enable quick and effective service delivery.

Developing a thriving and engaged workforce

Enabling new ways of working (e.g. remote, gig)

Focusing on company culture development

Driving strategic workforce plans

Enabling a skills-based organisation

Redesigning work and/or the organisation

Increasing ability to adapt

Importance of HR in Retail Productivity

To develop a competent and productive workforce that contributes to the success of retailers, HR functions need to enhance their capabilities, and introduce new ways of working to support the workforce. They need to design a strategic partnership with the business, design positive and agile user experiences for the workforce, and leverage on technology to drive data-driven manpower decisions.

HR Transformation Framework

The HR Transformation Framework provides a foundational approach for HR leaders to understand key functional pillars of HR. The framework serves to help HR leaders identify the root cause of issues as they transform their HR capabilities, with the key objective of enhancing productivity in the retail workforce.

HR Functional & IT Strategy: Purpose and outcomes of the HR function	• **Align HR workforce and IT strategies with retailers' focus and purpose** of the organisation.
	   • *Talent pool expansion in line with retail expansion*
	   • *Technology that improve HR operations*

HR Services and Structure: HR roles and responsibilities in driving HR services (e.g. Talent Acquisition, Workforce Planning, Talent Development)	• **Develop HR services** to value-add and support a resilient retail workforce today and in the future *(e.g. providing training opportunities, internal talent mobility, workforce planning, workforce modelling).*
	• Define **critical metrics** that measure the **overall health of the retail workforce**.
	   • *High retention rate*
	   • *High employee experience score*
	   • *Value of training provided*
	   • *Overtime hours*

HR Service Pre-requisites: Technical expertise and process evaluation	• **Identify and resolve HR policies and processes** that inhibit daily employee experience.
	   • *Simplified leave application process*
	   • *Agile schedule management system*

HR Foundations: Organisation Structure, Career Frameworks, Job Profiles	• Leverage on job profiles containing job descriptions and skills to **design career frameworks and pathways to enable growth** in the organisation.
	   • *On-the-job and classroom learning opportunities among emerging skills*
	   • *Career progression for employees that possess emerging skills*

Internationalisation

Retailers are looking to capitalise on new opportunities available in regional and global markets, taking on different modes of entry and support to drive such initiatives.

Key Challenges

However, while local retailers are keen to internationalise, they are faced with multiple challenges. These challenges can be broadly classified into the following: Macro-factors, business challenges, cultural differences and local competition.

Unstable macro-economic environment **1**

With the ongoing global disruption, retailers face several concerns in internationalising.

- Increased **risk and uncertainty** in stability of business operations in foreign countries
- Challenges in adapting to **foreign regulations and policies** such as international payments, banking restrictions and taxes/tariffs.

Business operations challenges **2**

For a business to internationalise, they will need a robust operations with sufficient resources to support international ventures.

- Concerns on whether they have the **right talent, technology and processes** to execute their internationalisation strategy.
- Other related **business risks** such as **managing supply chain** that crosses boundaries as well as shipping and storage costs.

Managing cultural differences **3**

Understanding the local context such as understanding what appeals to local consumers and correct business etiquette.

- Barriers in **understanding local business etiquette** and **communication nuances** may result in challenges such as working with local partners.
- Understanding cultural differences are not only critical for engaging consumers, they are also important for **managing and communicating with international teams and offices**.

Local competition **4**

Whenever a business enters a new market, they must be prepared to compete with local market leaders and gain market share to stay profitable.

- Limited understanding on **local market context, competitors** and **consumers** needs and wants
- **High barriers to entry** into market and **uncertainty around the business' competitiveness** against established market leaders and potential outcomes

Embarking on Internationalisation Journey

Retailers will need to consider several steps before embarking on their internationalisation journey. Starting from understanding if the organisation has the capability and the right mindset for internationalisation, to identifying which markets to enter and finally, laying out the execution plans.

1

Setting the company up for success

- Success of internationalisation is often rooted in commitment from senior management and key stakeholders.

- Aligning on why is internationalisation a priority for the business and what are some long-term goals to achieve.

- Ensure that plans are well-communicated with key stakeholders and address any queries.

WHY

2

Analyse strengths, weaknesses and resources requirement

- Internationalisation is a big step for most retailers. Having a business foundation and operational know-how will increase retailers chances in an overseas market.

- Assess current operations, workforce capabilities and readiness, resource requirements and define a clear internationalisation strategy.

WHAT

3

Bridging the strategy-execution gap

- Start by conducting market research, understanding local regulations, determining consumer profile and map out clearly how would the business engage and operate in the market.

- Identify what are the critical job roles and capabilities required to support internationalisation plans and how to train existing and new employees to thrive in a new market.

HOW

❖ Mercer

Modes of Internationalisation

Internationalisation modes vary for different retailers, depending on factors such as risk appetite, expectations on returns, degree of control and integration capabilities. Retailers will need to assess their current situations, long-term goals and visions and determine the best entry modes for internationalisation.

Degree of Involvement

E-commerce
A form of electronic commerce which enables consumers to directly buy products and services from a retailer over the Internet, using a web browser or a mobile application.

Risk: Low
Returns: Low
Control: Low
Integration: Negligible

Exporting
A well-established method of entering a foreign market which includes marketing and direct sales of domestically produced goods in another country.

Risk: Low
Returns: Low
Control: Moderate
Integration: Negligible

Franchising
Franchising involves a franchisor, who as the owner of a business grants a foreign company, the franchisee, the license to use its brand and sell its products or services.

Risk: Low
Returns: Low
Control: Moderate
Integration: Negligible

Joint Venture
A combination of two or more parties that seek the development of a single enterprise or project for profit, sharing the risks associated with its development.

Risk: Moderate
Returns: Moderate
Control: Moderate
Integration: Low

Acquisition
A company purchases another as it is deemed that the consolidation of both companies can prove to be more profitable than one by itself.

Risk: Moderate
Returns: High
Control: High
Integration: High

Greenfield
Company opens a wholly-owned subsidiary in another market including establishing a new or expanding an existing facility in a foreign country from ground up.

Risk: High
Returns: High
Control: High
Integration: High

| 7.2 | **Going Global Initiatives** |

Selecting the appropriate way to enter

Different modes of entry are more suited for different types of retailers; based on the archetypes in the retail sector we have outlined how 2 key archetypes factor may influence the chosen mode of internationalisation

Factors influencing Internationalisation Modes

| Company Size | **LARGE**
Greater financial ability to explore wider variety of internationalisation modes with higher returns | **SMALL**
Micro and small enterprises are usually limited to low-cost and low-risk options. |
| Digital Maturity | **DIGITAL LEADER / PLAYER**
Greater ability to utilise e-commerce and social commerce to reach overseas market. | **DIGITAL NOVICE**
Reliance on traditional entry methods and limited in terms of ability to reach overseas customers. |

Archetype's Preference for Mode of Entry:

DIGITAL LEADER/PLAYER

Archetype 1: Small, Digitally-Savvy
Preferred Mode of Entry:
- E-commerce

Archetype 2: Large, Digitally-Savvy
Preferred Mode of Entry:
- E-commerce
- Exporting
- Franchising
- Joint Venture
- Acquisition
- Greenfield

SMALL ← → LARGE

Archetype 3: Small, Digitally-Nascent
Preferred Mode of Entry:
- Exporting
- Franchising

Archetype 4: Large, Digitally-Nascent
Preferred Mode of Entry:
- Exporting
- Franchising
- Joint Venture
- Acquisition
- Greenfield

DIGITAL NOVICE

Archetype 1: Small & Digitally Savvy

Characteristics of this archetype

Companies belonging to this archetype are SMEs that possess robust digital capabilities. Many of these retailers are primarily pure-play online retailers or have established their presence in across both online (e.g. third-party marketplaces) and offline (e.g. retail formats) channels.

Preferred Mode of Entry

E-commerce

With the aim of expanding their business reach to international markets, many of these retailers **leverage online channels as a starting point for growth**.

As these companies are smaller and are constrained by their financial capabilities, most typically opt for a **lower risk and less operationally complex approach,** such as utilising e-commerce.

How are retail roles adapting to support internationalisation through e-commerce?

1 **Deeper understanding of international market e-commerce laws and regulations**

All retail roles will need to gain a working knowledge of the e-commerce laws and regulations in different countries. This may encompass collaboration with local authorities or partners to address any regulatory issues that arise.

2 **Increasing focus on online customer service standards**

As online channels may often become the only point of contact for international customers, it is crucial for retail roles to always keep in mind and prioritise providing excellent online customer service across all regions.

3 **Growing strategic importance**

Retail roles will be involve in development of overall e-commerce strategy for the company. This involves determining the brand's marketing approaches in different regions, establishing its cross-market reputation, and adapting delivery and customer services to cater to each region's needs.

4 **Focus on last-mile delivery**

Last-mile delivery is a critical aspect that differentiates e-commerce companies apart from one another. Therefore, for many retailers choosing to internationalise via e-commerce, there will be a great focus on last-mile delivery and how to adapt it to meet needs of different regions.

7.2   **Going Global Initiatives**

Archetype 1: Small & Digitally Savvy

Detailed changes to job roles

E-commerce Manager/Executive

⬆ Increasing global/regional scope
Stronger local business and legal knowledge

- **Conduct international market research** such as analysing customer online purchasing behaviours and market competition.
- **Apply knowledge on online regulatory laws** across different markets, working with local authorities to ensure company is compliant with e-commerce laws in the country.
- Establish **online customer service standards** to ensure consistent experience for all customers.

Brand Manager/Executive

⬆ Multi-dimensional and cross-functional work
Strategic and Planning

- **Design and implement global/regional brand strategies** that convey a consistent brand message.
- Work with local teams (including both internal and third parties) to **ensure brand is localised to meet the customers' needs.**

Warehouse Operations Manager

⬆ Increasing global/regional scope
Increasing partnership and collaboration

- **Ensure compliance with local regulations and requirements** in each market concerning transportation of product, data privacy and consumer protection.
- Manage **complex supply chain and logistics systems** that integrates online and offline orders across regions.
- Work with different delivery models and partnerships to meet local customer needs across regions.

Archetype 1: Small & Digitally Savvy

Detailed changes to job roles

Logistics Operations Analyst

⬆ Increasing complexity
Greater use of data to drive decision-making

- Optimise flow of goods to and from different countries and regions, taking into account factors such as **shipping times, customs procedures and regulations**.
- **Review and adjust logistics strategies** based on data from local markets on meeting the needs or customers and the business.

Customer Intelligence Analyst

⬆ Increasing global/regional scope
Multi-dimensional and cross-functional work

- Analyse **local market data on e-commerce performance and customer purchasing behaviours** to advice e-commerce teams on strategies for different markets.
- **Monitor successes of e-commerce performance** such as tracking online sales revenue across markets and customer feedback to identify areas for improvement.

Case Study: IUIGA

Singapore-based homeware brand IUIGA prides itself in offering thoughtfully-designed, premium quality everyday goods at affordable prices. The brand started its journey as an pure-play online retailer before establishing retail presence. The brand has since expanded into neighbouring countries such as Indonesia and Hong Kong and saw great success so far.

Pure-play online model
IUIGA first launched in 2017 as a pure-play online retailer. The brand gained popularity for their ODM model where they work directly with manufacturers and eliminate markups on quality homeware.

Retail journey
Many consumers wanted to touch and feel their products in-person before purchasing. IUIGA then decided to launch their first pop-up store in May 2018 before opening several stores across the island.

Leveraging on e-commerce
While the pandemic affected retail performance both locally and in Indonesia, the brand's strong e-commerce presence cushioned the blow. In fact, online sales almost tripled brick-and-mortar sales, supporting the business through the lockdowns.

Making strategic moves
The brand continues to see success in the local market. However, they are keen to explore further. Through research and understanding of overseas markets, they decided to enter Indonesia because of its young and tech-savvy demographics which represented huge potential.

Continuing the trajectory
The next step for IUIGA is to expand to other markets such as Hong Kong and Macau. The brand has already opened a retail outlet in Hong Kong and will continue its efforts in establishing its presence in the Hong Kong market[1].

IUIGA™

Note:
1 - From Diamond Rings To Furniture: "7-Figure" S'pore Startup IUIGA Is Conquering Many Verticals, Vulcan Post (2020)

Mercer
238

Case Study: IUIGA

Key Success Factors

Market Research

IUIGA's research efforts in understanding consumers' demographics, spending capabilities and preferences enabled them to select the right market to enter. This provides confidence for the brand to embark on its internationalisation journey.

E-commerce Capabilities

As the brand started as an online retailer, they were able to replicate their online success in foreign market such as building user-friendly platforms and applications. Even when the pandemic hits, IUIGA was able to sustain their growth in both Singapore and Indonesia through e-commerce sales.

Strong Branding

IUIGA started its journey with a clearly defined purpose. The brand continually engaged consumers and communicated their position, which helped to differentiate them from local competition.

Archetype 2: Large & Digitally Savvy

Characteristics of this archetype

Companies in this archetype are medium to large-sized organisations with robust omni-channel capabilities. They usually maintain a presence both online and offline, and have been integrating both channels to provide a comprehensive and consistent customer experience.

Preferred Mode of Entry

E-commerce or Greenfield

Most of these retailers **possess strong e-commerce capabilities** and many may commence their internationalisation journey through e-commerce.

However, once these retailers have grew to a certain scale, they may choose to **enter new markets directly via greenfield approach and establish new stores or facilities**. This approach enables them to maintain control over their brand and quality and unlock the potential for greater returns.

How are retail roles adapting to support internationalisation?

Increasing focus on localisation **1**

To succeed in new markets, larger retailers are developing more localised approaches to meet the needs of the local market. Correspondingly, many of these retail roles, including those in retail operations, marketing, logistics, and supply chain, will need to take on a more local or regional lens to support this objective.

2 **Greater use of data to drive decision-making**

Given their scale and ability to gather data from both online and offline channels, retailers are expected to leverage data insights to inform decisions about localising their products and services for different markets.

Increasing partnerships and collaborations **3**

Increasingly, retail roles will take on a strategic partnership role to develop new relationships in new markets. This is especially crucial when retailers are establishing new stores or facilities, as it requires close collaboration with local authorities and other vendors to ensure success.

Archetype 2: Large & Digitally Savvy

Detailed changes to job roles

Retail Operations Director

⬆ Increasing specialisation into local / regional markets
Stronger local business and legal knowledge

- **Identify opportunities in new markets and evaluate options for establishing new stores or facilities**, researching on various formats and regions, and understanding the laws and regulations that pertain to retail operations, such as workforce laws.
- **Train local frontline staff** on service standards and share product knowledge and expertise.
- **Oversee regional/global retail operations strategies**, including finding ways to improve the customer in-store experience to ensure alignment with service standards expectations.

Brand Manager

⬆ Multi-dimensional and cross-functional work
Strategic and Planning

- **Design and implement global/regional brand strategies** that convey a consistent brand message.
- Work with local teams (including both internal and third parties) to **ensure brand is localised to meet the customers' needs.**
- **Assess brand value and determine unique selling points** in target markets, by **monitoring feedback** from local consumers and franchisees to ensure that brand's value and key messages are aligned with local cultural and social norms.

Warehouse Operations Manager

⬆ Increasing global/regional scope
Increasing complexity

- Manage orders from a range of online (e.g., social media, website, third-party marketplaces) and offline channels.
- Design and adopt **the standard procedures and expectations for product flow and fulfilment in new geographical area.**
- **Oversee product inventory across multiple warehouses** in various regions and ensuring that inventory levels are adequate for both in-store purchase and last-mile delivery options.

Archetype 2: Large & Digitally Savvy

Detailed changes to job roles

Logistics Operations Analyst	⬆ Increasing complexity Greater use of data to drive decision-making

- **Assess feasibility of logistics operations** in various markets and **determine the optimal logistics arrangement** for respective market and region.
- Optimise flow of goods to and from different countries and regions, taking into account factors such as **shipping times, customs procedures and regulations**.
- Continually **review and adjust logistics strategies** based on data from local markets on meeting the needs or customers and the business.

Merchandising Manager	⬆ Increasing global/regional scope Increasing partnership and collaboration

- **Determine anticipated performance of certain products and services** in different markets and utilise data to inform merchandising decisions about which products are most suitable for different markets.
- **Establish new vendor relationships** in local market such as sourcing and working with new suppliers or manufacturers to ensure quality products at available at reasonable prices for the market.

Digital Marketer	⬆ Greater use of data to drive decision-making Increasing specialisation into local/regional markets

- **Conduct research to understand local cultural norms** to ensure that marketing strategies utilise appropriate channels for advertising, and create culturally relevant content for local markets.
- **Adapt marketing campaigns to local market taste and preferences**, based on market research data available (e.g. engaging local influencers, optimising search engine visibility).

Case Study: Love, Bonito

Love, Bonito was birthed on a Livejournal platform, (called BonitoChico) in 2005 and was subsequently rebranded in 2010. Over the past decade, it has become a household name and is highly regarded as a successful regional omnichannel womenswear brand. To date, Love, Bonito has 18 physical retail stores across Singapore, Malaysia, Indonesia, Cambodia and Hong Kong, and its ecommerce stores ships to 20 countries worldwide.

Humble beginnings
In 2005, the co-founders started BonitoChico as a platform to sell pre-loved clothes to earn some extra pocket money. As customer demand grew, the brand started designing apparels that better fit the Asian physique and officially rebranded to Love, Bonito as part of the migration to the official e-commerce website.

Expanding to Southeast Asia
Outside of Singapore, the brand has been well-loved by many in both neighbouring and international markets. In 2018, the brand secured its Series B Funding of US$13 million, led by Kakaku.com and Openspace Ventures to further expand into Southeast Asia with a strong omnichannel strategy.

Empowering girls
In 2021, Love, Bonito launched its social impact arm, LBCreate, to bring women's issues to the forefront and create actionable steps for the future. The project has since donated US$223,000 constituting of cash and products to beneficiaries in Southeast Asia.

Journeying through the seasons
Beyond work and casual wear, Love, Bonito expanded into new verticals, targeting women across various life stages with the launch of Kids, Loungewear, Intimates, Maternity and Footwear collections.

Going global
With the recent Series C Funding of US$50 million, led by Primavera Capital Group, Love, Bonito strives to evolve into a female ecosystem, with strategic focus around international and category expansion. It recently acquired activewear brand *cheak*, and made a small stake investment in a natural healthcare start-up *Moom Health*.

Love, Bonito

Note:
Adapted from Love, Bonito

Case Study: Love, Bonito

Key Success Factors

Strong branding

Throughout its expansion journey, Love, Bonito was careful not to dilute its brand identity. Despite opening stores across different markets, Love, Bonito wanted to ensure that consumers are able to enjoy a consistent shopping experience and know clearly what the brand stands for.

Experimenting

Before entering new markets, Love, Bonito spent time to experiment with new store formats such as pop-up stores to experiment with novel concepts and gauge receptivity with foreign consumers which enables them to gain preliminary insights on what works in the market.

Adapting to local needs

Love, Bonito also did well to adapt to local context. For instance, they have been working with influencers from respective markets to nuance messaging and adapt content to each market's needs. This ensures that their marketing content and products are well-suited to consumers.

Archetype 3: Small & Digitally-Nascent

Characteristics of this archetype

Companies belonging to this archetype are SMEs with basic digital capabilities. Many of these retailers may have a unique product or service proposition that can address problems within the international target markets, and are looking to expand and develop their brand overseas.

Preferred mode of entry

Franchising

Retailers act as a franchisor to provide operational processes, licenses and business models, which enable franchisees to sell and market their products and services, in return for pre-determined royalty fees.

Franchising offers **retailers the opportunity to expand their brand's products and services** while **limiting the operational costs and risks involved** in international brand expansion.

How are retail roles adapting to support internationalisation through franchising?

Maintaining consistent brand and quality control

1

Retail roles have to design scalable and replicable sales and brand strategies, to ensure franchises can adhere and deliver consistent brand guidelines among the target markets.

2   **Developing support structures for franchisees**

Retailers need to transition towards the role as a franchisor, growing and supporting franchisees in various operational requirements. Retail roles need to identify potential partnership opportunities, and design materials (e.g. training and direct access to suppliers) to support franchisors as they grow their network.

Managing the expansion of franchises   **3**

As franchisors, retail roles will shift towards providing centralised support for the franchisees. Retail roles have to monitor the overview of infrastructure across franchisees (e.g. location, growth roadmap), to ensure the brand is expanding sustainably without affecting overall market growth.

7.2   **Going Global Initiatives**

Archetype 3: Small & Digitally-Nascent

Detailed changes to job roles

Retail Operations Director ⬆ Increased partnership and collaboration
Strategic and planning

- Work with franchisees to **oversee and implement retail store operations and environment**, ensuring service standards and processes are aligned and tailored to local market interest and demand.
- Oversee retail operations strategies, ensuring franchisees are **aligned with local manpower and product distribution rules and regulations** (e.g. staffing requirements, products offered)**.**

Brand Manager ⬆ Multi-dimensional and cross-functional work
Strategic and planning

- **Communicate brand expectations and ensure brand consistency** across franchisees.
- **Assess brand value and determine unique selling points** in target markets, by **monitoring feedback** from local consumers and franchisees to ensure that brand's value and key messages are aligned with local cultural and social norms.

Customer Intelligence Analyst ⬆ Increasing global/regional scope
Strategic and planning

- **Utilise market research and consumption data** to identify trends and opportunities for overseas expansion (e.g. target market, location, demographics).
- Aware of current trends and target audience to **help retailers identify relevant types of franchisees** (e.g. understands target demographics, aligned with business objectives), ensuring franchises grow in a sustainable manner.

Mercer

Case Study: Ryan's Grocery

Ryan's Grocery is a Singapore-based grocer founded in 2015. Ryan's Grocery aims to provide sustainable, ethical and allergen-friendly food for local Singaporeans. The company has since expanded to Vietnam with a franchise model and looks to expand further in the region.

Strong brand purpose
From its inception, Ryan's Grocery aims to fill an important gap in the supermarket subsector. The subsector was lacking of high quality, sustainable and allergen-free produce and Ryan's Grocery saw this as an opportunity to cater to a niche consumer segment.

Understanding demand
It was not long after where the company saw demand from travelers. In particular, there was significant demand from travelers from Southeast Asian countries such as Vietnam. This trend prompted Ryan's Grocery to enter the Vietnamese market in 2019.

Adapting and learning
Furthermore, cultural differences such as business practices and decision making were also done differently in Vietnam. The company leveraged on franchisees relationship to understand working dynamic and gradually adapted to the rules, regulations and norms in Vietnam.

Franchising[1]
Ryan's Grocery decided to go with franchising model due to its lower risk and ability to control brand image and quality. Initially, it was challenging for the company due to language differences. This is especially so when reviewing official documents or training local staff.

Building on past successes
The company continues to embark on international growth in regions such as Hong Kong, Cambodia, and Indonesia. From their past experience in Vietnam, Ryan's Grocery has greater confidence in their ability to adapt and operate in other markets.

Note:
1 - Serving Up Organic Success in ASEAN, BizQ (2021)

Case Study: Ryan's Grocery

Key Success Factors

Unique value proposition

Ryan's Grocery had a strong value proposition that appealed to both local and foreign consumers. The brand could differentiate its position against both local and foreign competitors and successfully communicate its value proposition to consumers.

Market research

Through interactions with consumers and analysing sales data, the brand was able to identify a trend of growing demand from Vietnamese consumers. It was also clear that there was an opportunity for expansion in the market and Ryan's Grocery was able to reap benefits of being a first-mover.

Choosing the right mode of entry

Franchising enabled Ryan's Grocery to enter the market with a lowered cost and risk. At the same time, they still maintained control over standards and quality to maintain their brand image.

Archetype 4: Large & Digitally-Nascent

Characteristics of this archetype

Companies belonging to this archetype are large, locally established organisations with basic digital capabilities. Many of these retailers rely on conventional methods of entry, requiring human capital and finance support to enter international markets.

Preferred mode of entry

Joint Venture

Retailers seek to collaborate with existing businesses in the target market, leveraging on established operations and/or brand identity to drive business growth.

Joint ventures develop products and services **based on shared resources,** and **offer complementary strengths to reduce risks** associated with entering a new market.

How are retail roles adapting to support internationalisation through joint venture?

Driving effective assimilation of brand into target markets

1

Retail roles need to work with local partners to identify critical needs of consumers in the new target market, integrating local market and culture knowledge into service and operational processes that align with local standard practices.

2 **Adopting strategic business agility across functions**

Retail teams have to stay agile and adapt to changes in business objectives. Joint ventures may result in rapid expansion of business scope, and would require retail teams to hire or take on additional responsibilities in order to manage business growth.

Spearheading new market opportunities **3**

While joint ventures provide initial competitive advantage to retailers within a target market, retail teams have to tap on existing advantage to explore new value propositions to remain competitive. Retail roles have to innovate and launch unique products and experiences that would enable continuous expansion across cities and regions.

7.2 **Going Global Initiatives**

Archetype 4: Large & Digitally-Nascent

Detailed changes to job roles

Retail Operations Director ⬆ Increased partnership and collaboration
Strategic and planning

- Collaborate with partners to **design retail store operations and environment**, ensuring service standards and processes cater to local market interest and demand.
- Oversee retail operations strategies, ensuring retail capabilities (e.g. staffing requirements and products offered) **are aligned with local rules and regulations.**

Omni-channel Manager ⬆ Multi-dimensional and cross-functional work
Increasing global/regional scope

- **Conduct international market research** to understand market demands, such as analysing customer online purchasing behaviours and market competition.
- **Design new omni-channel strategies** that incorporates both offline and online sales channels, identifying ways to improve user experience for different segments of consumers.
- Establish **online and offline customer service standards** to ensure consistent experience for all customers.

Digital Marketer ⬆ Increasing global/regional scope
Increasing complexity

- **Create differentiated engagement and marketing approaches** for different consumer segments in different regions, identify and execute innovative marketing strategies.
- Retailers could leverage on existing partnerships and business advantage to **experiment with new digital marketing strategies**, working with agencies or developing talent that help target new audiences within the digital economy.

Case Study: Sheng Siong

Founded as a provision shop in Singapore in 1985, Sheng Siong has since expanded to become one of Singapore's top retailers, with over 60 stores island-wide[1]. The supermarket has also ventured overseas in China, launching four supermarkets in Kunming between 2017 to 2021. Its fifth store was opened in May 2023.

Humble roots
Sheng Siong started as a small provision shop in Ang Mo Kio. Since then, they have expanded primarily in heartlands of Singapore, providing 'wet and dry' shopping options with a wide assortment of products.

Developing household products
In the past decade, they have developed a selection of house brands that offer customers quality alternatives at substantial savings. These products are developed with a key focus on safety, quality, health and nutrition, and value-for-money.

Successful overseas venture
Towards the end of 2014, they entered into a conditional joint venture agreement to operate supermarkets in China. They unveiled its first overseas venture in Kunming in November 2017. Leveraging on their partners' existing networks, they successfully launched five stores in Kunming.

Digitalisation adventures
In 2014, they started an online shopping platform for groceries – "allforyou.sg", offering e-commerce services in Singapore. The online platform has been rebranded as "Sheng Siong Online" in 2021, as they embarked on their omni-channel retail journey.

Looking forward
With China reopening and moving away from its zero-COVID-19 policy, they expect to improve sales comparatively with increased footfall. They have also opened their fifth store in Kunming within the first half of FY2023.

Note:
1 – About Us, Sheng Siong

Case Study: Sheng Siong

Key success factors

Leveraging partnerships

Through joint venture partnerships, Sheng Siong was able to understand local market regulations, and leverage on partners' existing relevant resources and experiences to offer products and services that would best meet their target customers' needs.

Agility & adaptability

While Sheng Siong started as a brick-and-mortar retailer, the brand identified market changes and swiftly established an online and omni-channel presence. They revamped their e-commerce platform to provide omni-channel retailing, catering to customers with different shopping preferences.

7.2 Going Global Initiatives

Retail Job Roles Critical for Internationalisation

Overall, while the mode of entry may influence the roles needed for successful internationalisation, there is consensus that there are some core capabilities needed for retailers to successfully internationalise. We have identified 8 key retail job roles that possess the necessary skills and capabilities needed to support retailers in internationalisation.

Retail Operations	E-commerce	Merchandising	Brand Management

Retail Operations Director
- Sets strategy for retail operations across different regions.
- Oversee store performance and operations for overseas stores, including upskilling of staff.

E-commerce Manager / Executive
- Plan and execute e-commerce platforms across different region, identifying more relevant platforms.
- Embed consistency in user experience across all sales channel.

Merchandising Manager
- Analyse customer data to identify relevant products for new markets and to enable the responsive purchasing of products/ management and display of stock.

Brand Manager
- Create and execute the overall brand strategy.
- Maintain desired degree of brand consistency across all markets and localising content as needed.

Supply Chain & Logistics

Warehouse Operations Manager
- Monitor inventory levels to ensure that goods are available for delivery to different regions, accounting for regulatory or other challenges.
- Manage shipping and receiving of goods between different locations.

Logistics Operations Analyst
- Work with local 3PL partners to ensure timely fulfilment of products.
- Analyse data to predict inventory levels and direct flow of goods to different regions.

Logistics Solutions Specialist
- Analyse data to identify gaps in supply chain and provide solutions to improve supply chain resiliency.

Emerging Job Roles Critical for Internationalisation

Besides existing retail job roles, retailers are also exploring new roles to assist them in internationalisation. These roles possess digital capabilities and will be critical for retailers embarking on e-commerce internationalisation journey.

Digital Marketer

- Understanding customers preferences in different market and customising messages and marketing content appropriately.

- Working with local KOLs or partners to curate suitable content for regions.

UI/UX Designer

- Providing insights to improve e-commerce and online apps, leveraging on a user-centric approach.

- Recommending changes to platforms based on understanding of local preferences.

Customer Intelligence Analyst

- Leveraging data analytics capabilities to form customer insights across different regions, driving informed decision making.

- Provide customised recommendations for different regions.

Full Stack Developer

- Support the build and development of user-friendly applications, bearing in mind restrictions and technology capabilities across different regions.

- Ensure that all systems and platforms are well integrated across regions that the business is operating in.

Digital Transformation Manager

- Develop digitalisation strategy for the whole of organisation, taking into account regional e-commerce operations.

Manpower Best Practices

To develop a strong and sustainable retail workforce, retailers and HR leaders have to focus on understanding the fundamentals of employees, and consider the following manpower best practices:

1. Defining & Communicating the Employee Value Proposition

2. Developing a Compelling Employer Brand

3. Developing Career Frameworks & Progression Pathways

4. Adopting New Workforce Models / Unlocking New Talent Pools

5. Redesigning Job Roles for Transformation / Creating Multi-Dimensional Job Roles

Manpower Best Practices

1 Defining & Communicating the Employee Value Proposition (EVP)

To improve current perceptions of the retail sector among job seekers and current employees as well as meet changing work expectations and preferences, retailers will need to redefine and communicate their EVP.

- Job seekers and employees are demanding for greater **flexibility, training and development opportunities and better compensation and benefits,** which may not be a foremost concern or even on the radar of retailers.

- The retail sector also faces **challenges in effectively communicating** its employee value proposition.

Challenges or trends this recommendation responds to:

- Perceptions of the retail sector / EVP
- Manpower shortages and reskilling challenges
- Consumer of the future

What is Employee Value Proposition?

An EVP defines **the commitment the company will make to develop the employee in exchange for the effort the employee puts in to benefit the company**. It encompasses more than just compensation and benefits, including career advancement and opportunities, training and development, health and wellness, work-life balance, and meaningful and valued work. It is about **"defining the deal"** between an employee and the organisation.

Employers must recognise the varying expectations of different employee segments and tailor their offerings accordingly. For instance, retailers could offer fresh graduates greater flexibility in their work schedules while provide retirement benefits for senior employees. By being attuned to the diverse needs of employees, employers can enhance their ability to attract and retain talent.
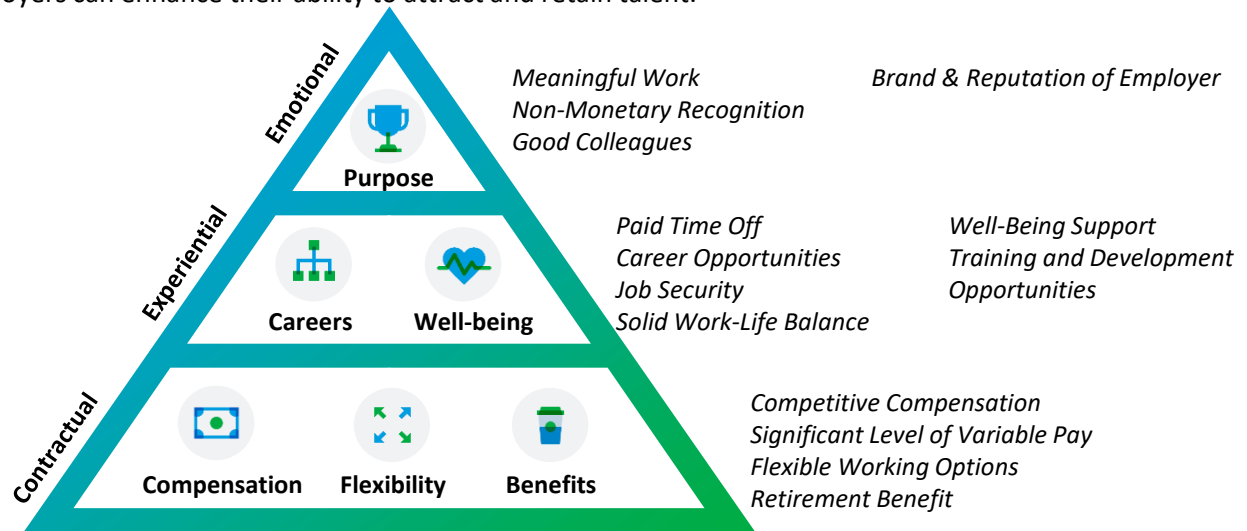
Emotional
Purpose
Meaningful Work
Non-Monetary Recognition
Good Colleagues
Brand & Reputation of Employer

Experiential
Careers　**Well-being**
Paid Time Off
Career Opportunities
Job Security
Solid Work-Life Balance
Well-Being Support
Training and Development Opportunities

Contractual
Compensation　**Flexibility**　**Benefits**
Competitive Compensation
Significant Level of Variable Pay
Flexible Working Options
Retirement Benefit

Mercer's Employee Value Proposition (EVP) Model

1 Defining & Communicating the Employee Value Proposition (EVP)

What can a strong EVP look like in the retail sector?

Tailoring EVP to different segments

Retailers should consider tailoring their EVP to meet varying needs and priorities of employees at different career stages. This requires understanding and evaluating the needs of each employee group in order to create an EVP that will effectively attract and retain top talent.

For instance, **flexibility** has been a key concern for many retail employees. Student employees could only begin work after school while senior employees may prefer to end work early. Understanding such needs and introducing some degree of flexibility can improve employee satisfaction and retention.

Investing in communication

To be effective, a strong EVP needs to be communicated well. Retailers could showcase to job seekers what it would look like to work for them and use different channels to reach existing employee groups. Importantly, a company's EVP needs to be translated into company's policies and practices.

Retailers are using **social media and interactive content** to showcase the employee experience to job seekers. It is also crucial to communicate the EVP clearly to current employees through channels such as emails/newsletters and gather regular feedback through **surveys or focus group discussions.**

What can retailers do to develop a strong EVP?

1 Starting from the basics

- Conduct surveys and focus groups to gather feedback on what employees want.
- Create specific programs to cater to different needs of employee groups.
- Examine the return on investment on employee outcomes such as retention and engagement.
- Ensure contractual elements are competitive but expand the definition of rewards beyond this.

2 Focusing on Employee's Experience

- Upskill managers to have meaningful career conversations with employees.
- Offer career growth opportunities by structuring career frameworks.
- Educate and share opportunities for career progression to current and prospective employees
- Invest in employees' financial, physical, social and emotional well-being.

3 Creating a Thriving Environment

- Gather feedback through survey or discussion on how employees would like to be engaged and if there are any communication gaps.
- Tailor communication based on feedback and establish suitable communication channels.
- Communicate the value proposition in an engaging and personalised ways and develop managers to be advocates.
- Put in place recognition programs and team activities to build a culture that values employees.

Manpower Best Practices

1 Defining & Communicating the Employee Value Proposition (EVP)

What are some considerations for retailers?

When defining and communicating a company's EVP, there are a few key considerations for retailers to note of:

- **Quality of jobs offered:** Retailers should design job roles that are meaningful and interesting, communicating them to job seekers to increase the attractiveness of retail jobs.

- **Alignment to company culture:** A company's EVP should always be linked to its mission, vision and values, allowing employees to easily connect with it. This also reinforces the company's culture and values. For example, a company that values collaboration will invest in fostering a positive work environment where employees feel empowered, supported and recognised for their contributions to the team.

- **Integrated into HR policies and practices:** Companies need to go beyond simply defining some EVP principles and communicating these through their employer brand. To truly bring the EVP to life, companies should review their HR policies and practices (e.g. career development approaches, pay and benefits policies) to ensure the EVP is reflected and for both prospective and current employees.

- **Competitiveness:** While EVP is a vital tool for retention, companies will need to ensure that decisions are feasible and sustainable for them to implement. This requires making decisions that are supported by data and market research. Begin by performing benchmarking and comparison with similar companies to assess current performance and pay competitiveness.

Resources for retailers

Employer Branding to Attract and Retain the Right Talent
- Hands-on, practical 2-day programme for HR practitioners to understand importance of EVP, define EVP and factors that attract talent and assess goals, strategy and action plan to enhance EVP.

Manpower Best Practices

2 Developing a Compelling Employer Brand

Retailers often face a common challenge of attracting qualified candidates. With competition for talent from other industries and the gig economy, retailers need to **build a stronger brand** to attract and retain employees. Globally, the employer brand has become a key factor in boosting attraction and retention.

Employment review forums and social media have also enabled job seekers to gather insights and opinions from former employees before joining a company. As such, brands must cultivate positive relationships with their employees, listening intently to their stakeholders and align their actions with their core values to maintain a strong employer brand.

Challenges or trends this recommendation responds to:

- Perceptions of the retail sector / EVP
- Manpower shortages and reskilling challenges
- Consumer of the future

What is employer branding?

Employer branding refers to the **reputation the brand has as an employer among existing employees and the overall workforce.** The employer brand is determined by how the organisation is viewed by existing employees and potential job seekers, and should be **consistent with its customer brand**. The employer brand serves to help retailers differentiate itself from competitors, justifying why employees should work in the organisation, and illustrating how the brand is growing and strengthening over time.

Components of an employer brand

Vision, Mission & Values + **Work Culture** + **Employee Value Proposition** + **Brand Image & Reputation**

Vision, Mission & Values	Work Culture	Employee Value Proposition	Brand Image & Reputation
Having clear vision and mission that articulates what the company stands for and aspirations. Define a set of values that outlines the company's identity, culture and priorities.	Create a thriving work environment where employees and teams are satisfied and guided by exceptional leadership.	A promise made to employees that outlines what employees can expect from working at the company, as well as highlighting higher value job roles.	Image of the company as perceived by the outside world including customers, potential employees and the market.

Manpower Best Practices

2 Developing a Compelling Employer Brand

What can a compelling employer brand look like in the retail sector?

Connecting the employer & customer brand

A well-established customer brand helps the outside world recognise the values the retailer upholds, and is often associated with their perceptions of the workplace culture. As such, retailers need to integrate the employer and customer brand into one and brand values should be reflected in the company's culture and policy.

Apple is perceived by consumer and market as a leader in innovation and constantly pushing the boundaries. This impression, similarly, holds for job seekers as well and many are attracted to the innovative and agile work culture in the company.

Building a culture that speaks for itself

Employees are the best marketing assets for the company. A company that prioritises its people by investing in training, providing growth opportunities and demonstrate commitment to a greater purpose (e.g., sustainability, supporting communities) can be confident that its employees will become champions of their workplace.

Companies are investing in improving employee's experience to increase job satisfaction and promote employee advocacy. This is shown through the use of **referral programs** that involve employees in finding qualified candidates for the company.

What can retailers do to develop a compelling employer brand?

1 **Shape your brand**

- Identify unique brand differentiators that serve as genuine employees' promises.
- Design fair work standards that are aligned with customer brand values.
- Identify key employee characteristics that would support the brand's vision and values.

2 **Showcase your brand**

- Utilise various channels – websites, job postings, and other recruitment materials to deliver a clear and consistent brand message.
- Understand how engagement channels (e.g. career pages, job portals, employment review platforms) effectively connect with potential candidates.
- Promote a consistent overall brand story to customers and job seekers.

3 **Evaluate & evolve**

- Design a fair and unbiased employee listening programme to understand employee sentiments.
- Provide anonymous channels that allow employee to share honest feedback.
- Review employment websites and social media to identify high priority workplace issues.
- Upskill managers to identify and address potential dissatisfaction within teams proactively.

Manpower Best Practices

2 Developing a Compelling Employer Brand

What are some considerations for retailers?

When defining and communicating the overall employer brand, there are a few key considerations for retailers to note of:

- **Consistency:** As the employer brand is often linked with the its overall brand story, retailers need to be conscious that the brand experience is consistent and resonates with employees, job seekers and customers alike. When the brand story presented to consumers is at odds with what the company promised its employees, employees may feel that the company is disingenuous which could have severe outcomes.

Manpower Best Practices

3   Developing Career Frameworks and Progression Pathways

The concern about a lack of career progression among both current employees and job seekers was a major contributing factor to the high attrition rate in the retail sector.

- Unaware of potential career pathways and opportunities.

- Retail companies are failing to effectively convey the potential career advancement opportunities they offer to their employees.

Developing career frameworks and progression pathways would help employees envision their potential careers with the organisation.

Challenges or trends this recommendation responds to:

- Perceptions of the retail sector / EVP
- Manpower shortages and reskilling challenges
- Consumer of the future

What are career frameworks?

The Career Framework reflects the organisation's career philosophy, providing an overarching classification of the nature and hierarchy of jobs in an organisation, with the abilities, knowledge and critical experiences expected of employees to fulfill their job requirements.

The Career Framework serves as a guide for employees and employers to **identify flexible career paths** across functions within the organisation. The framework design also enables adjacent HR processes such as strategic workforce planning, managing career and succession plans, as well as developmental capabilities to ensure investment of skills in the workforce remain relevant to achieve business objectives.

Career Framework consists of:

CAREER TRACKS

Draws distinctions between types of work and can be used to communicate career paths: *Individual Contributor* (support, technical, professional) or *People Leader* (management or executive)

CAREER LEVEL

The hierarchical position of a job within a career track.

Recognises *changes in job scope and responsibilities*.

Consistent across job families.

FAMILY + SUBFAMILY

Generally recognised major professional area, often requiring a *unique set of skills.*

Most *career progressions* occur within a job family.

Does *not directly align to organisation structure*

SKILLS

The *ability or knowledge* possessed by a person, which may be required to perform a task, assignment, gig, job, or role.

Manpower Best Practices

3 Developing Career Frameworks and Progression Pathways

What does an effective career framework look like in the retail sector?

Transparent career growth opportunities

A well-developed career framework would contain skills and experiences required in a job role. Managers and employees can leverage on the framework and pathways to engage in a transparent conversation, identifying roles that they can develop and grow into that would support current operations. The lateral and vertical progression of careers within the organisation also enable employees to explore opportunities in line with their interests.

Companies have started **identifying skills absent in their current organisation, and developing existing employees to take on new roles (e.g. retail operations transitioning to e-commerce).** Retailers can shift towards adopting such changes across the organisation, allowing early and mid-career employees to explore larger roles across functions.

Training & development

Retailers can identify potential skill gaps within the workforce, and provide training opportunities for employees. Employees seeking growth and development can take on formal (e.g. training courses) and informal (on-the-job rotations) training provided. Retailers can leverage on the career framework to identify training opportunities related to the key skills in specific roles, and justify training resources allocated (e.g. time, money) to develop employees.

Retail organisations have **developed management associate programmes or functional rotations** to attract new joiners, providing opportunities for employees to develop multi-functional skills that would be relevant across business operations.

What can retailers do to develop an effective career framework?

Retailers have to identify and develop the key critical roles that would be relevant to achieve their current and future business objectives. Businesses can leverage on existing SkillsFuture Skills Frameworks to understand and evaluate the roles and responsibilities required for the businesses.

1 Identifying pivotal job families and roles

- Identify job families and key functions that drive the future of retail business operations.
- Roles identified may not exist in current business operations, but are critical in ensuring business remain competitive in the future.

2 Identifying key skills

- Skill descriptors complemented by proficiency levels signal the level of knowledge and expertise required at the job role.
- Emerging skills may be identified that do not exist in the organisation, signaling the need to develop training programmes or alternative career pathways that would develop these skills.

3 Designing skills-based career pathways

- Job roles with similar skill requirements may result in new career pathways across and within job families.
- Existing roles may expand and take on new skills and job tasks, expanding job roles and providing new opportunities for employees.

Mercer

Manpower Best Practices

3 Developing Career Frameworks and Progression Pathways

What are some considerations for retailers?

When developing a career framework with multiple progression pathways, there are a few key considerations for retailers to take note of:

- **Driving an open and honest manager-employee relationship:** Retailers need to drive a culture of open and honest conversations between managers and employees, identifying skills and training needs for employees to take on. Employees should understand the critical skills required for the business, and express interest in upskilling and taking on tasks that would enable them to progress in their career.

- **Determining talent pipeline and succession planning strategy:** Retailers have to identify talent that are proficient and interested in roles across the career framework. Retailers should review the framework, and identify alternative sources of talent to address immediate business needs for specific skills, investing in hiring or development programmes that attract talent to the retail sector.

Resources for retailers

SkillsFuture Skills Framework
- The Skills Frameworks and the JTM report (e.g. Chapter 6: Job and Skills) provide retailers an understanding of roles currently available in the retail sector, as well as potential emerging job roles as the retail industry evolves.

Manpower Best Practices

4 Adopting New Workforce Models & Unlocking Talent Pools

The retail sector faces a crisis in attracting talent, especially for full-time retail operations roles such as the Sales Associate. This is due to various factors, including: 1. long and inflexible working hours, 2. intensified talent competition with the option of gig work, and 3. stigma against non-full time employees. Hence, the retail sector needs to consider alternative sources of talent supply to alleviate the issue.

- Mercer's survey results have indicated that there are opportunities to attract **students, diploma graduates and semi-retired** to work for the retail sector.

- The restructuring of workforce models could also better **integrate part-time employees** into the workforce. By doing so, retailers can address the challenge of manpower shortage and also support their part-time workforce. This can help them to see a long-term career in the sector.

Challenges or trends this recommendation responds to:

- New retail model
- Manpower shortages and reskilling challenges

What are new workforce models and talent pools available in retail?

Through our industry engagements, we have identified some potential talent pool profiles that could be attracted to join the retail sector. These are potential talent supply pools that retailers could tap on. Understanding that these segments have their own needs and preferences enable retailers to better support these groups[1].

Students
16-25 years old

Motivation:
To earn extra pocket money for daily expenses. Trending brands with a large market presence would likely interest this talent pool.

Working arrangement preferences:
Part time/gig workers , short-term hires during the school holidays

Length of time looking to spend in the industry:
1-3 years

Fresh ITE / polytechnic graduates
19-23 years old

Motivation:
To gain working experience for career development opportunities.

Working arrangement preferences:
Part time, weekends, internships, long term career opportunity

Length of time looking to spend in the industry:
10+ years

Semi-retired adults
60+ years old

Motivation:
To remain active and socially connected.

Working arrangement preferences:
Part time, weekdays, long term

Length of time looking to spend in the industry:
5-10 years

Note:
1 – Mercer's Retail Manpower Study Surveys and Industry Engagements

4 Adopting New Workforce Models & Unlocking Talent Pools

On top of identifying new sources of talent that might join the sector, retailers should also consider introducing alternative workforce models that could help to address business challenges relating to manpower shortage and at the same time, provide more options for diverse employee groups. Permutations of talent models can be introduced to accommodate needs of different retailers.

What would new workforce models look like in the retail sector?

D e g r e e   o f   d i s r u p t i o n

Shift-based Workforce Model

Employees assigned to a single store with a **full-time, part-time or seasonal schedule.**

Part-time
Work schedule that is performed for periods of time shorter than usual hours

Shift-Based
Work schedule that is performed for specific recurring periods (e.g., night shifts)

Seasonal
Work schedule that is performed based on demand (e.g., holidays, sales period)

Ecosystem Workforce Model

Employees assigned across **stores, functions and even companies** based on demand.
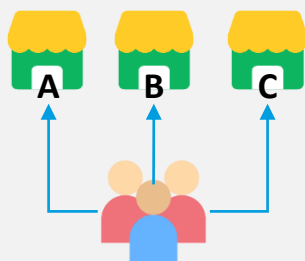
Retailers could hire a pool of employees that could be reassigned to different stores depending on forecasted demand. For instance, if Store A is expected to have more crowd over certain periods, more employees could be directed from store B to support store A instead.

Task-based Workforce Model

Employees performed **specific tasks** in a flexible, contract-based arrangement.

Example: Replenishing Stocks

A   *Identifying stocks with low quantity*

B   *Determining amount to restock based on data*

C   *Checking inventory for stock supply*

D   *Filling stocks on shelf*

Gigable Tasks

Retailers could deconstruct activities into finer tasks and identify which could be outsourced to gig-economy workers to reduce demands on employees. These tasks may not be core to the organisation and third parties could possess the right capability to do the job well.

Manpower Best Practices

4 Adopting New Workforce Models & Unlocking Talent Pools

Depending on retailers' characteristic and preferences, different workforce models could be leveraged in tandem to help alleviate manpower shortage challenges.

Shift-based Model	• Rely on a pool of part-time/gig employees to operate which allows for greater flexibility • Most common model • Suitable for retailers of all sizes and easier to implement
Ecosystem Model	• Suitable for larger retailers with multiple stores and brands to manage • Ability to direct manpower to different locations and support different activities based on manpower demands within the store • Ability to rotate employees to try something different
Task-based Model	• Suitable for retailers of all sizes • Retailers will need to deconstruct key activities into granular tasks. Tasks could be then outsourced to gig worker or other employees

The Talent Marketplace

Organisations are facing challenges in matching **demand** (jobs, roles, projects, special initiatives) to **supply** (internal and external talent, gig workers). With employees demanding for greater flexibility and choices at work, many are starting to explore ways to redesign job roles to become more value-adding and flexible.

Increasingly, organisations are looking to establish talent marketplaces to source for suitable resources. Through the use of AI-based technology, talent marketplaces help to match skills required with skills available both within and outside of the organisation, and recommend suitable resources to fulfil the tasks. This could include employees, contractors, gig workers and part-timers.
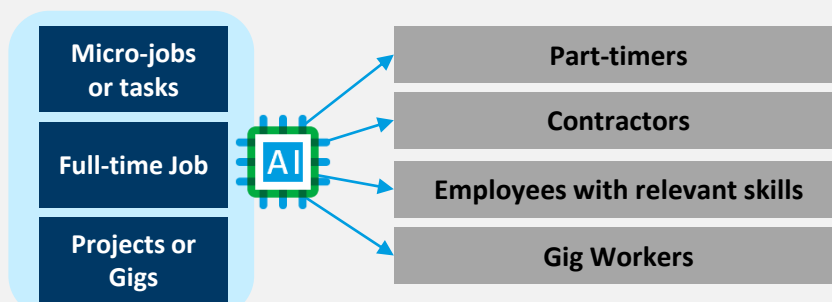
Micro-jobs or tasks		**Part-timers**
Full-time Job	AI	**Contractors**
		Employees with relevant skills
Projects or Gigs		**Gig Workers**

   267

Mercer

Manpower Best Practices

4 Adopting New Workforce Models & Unlocking Talent Pools

What can retailers do to adopt new workforce models and unlock talent pools?

1 Understanding manpower gaps and identifying suitable alternatives	**2** Changing the perceptions of part-time/gig employment	**3** Establishing new ways of working
• Retailers need to start with understanding the current roles that are facing shortages and identify the types of activities performed. Explore if such activities could be performed by alternate talent pool such as non-FT employees such as part-timer, contractor or gig workers. • Conduct pilots to assess effectiveness and feasibility of alternative workforce models. Be willing to adapt and pilot new workforce models for different roles (BOH, FOH).	• Reviewing existing compensation and benefits policy for non-FT employees. • Communicate the importance of non-FT employees as an essential part of the workforce. Create opportunities for integration including team activities, providing training and other developmental opportunities. • Create a compelling EVP for non-FT worker, focusing on providing them fair benefits and opportunities for career growth and recognition.	• To sustain changes, retailers will need to review existing policies and processes to support different types of talents as well as the flow of talents across functions and teams – for instance, what that means from a performance management standpoint and metrics to measure success.

What are some considerations for retailers?

When developing alternative workforce models and new talent pools, there are a few key considerations for retailers to note of:

• **Change Management:** Introduction of new workforce models and ways of working is a big change for many employees and retailers have to adapt. Managing expectations and transition for both full-time employees as well as alternate talents such as gig workers to ensure that alignment and motivation to deliver the same business objectives.

• **Supporting a sustainable working arrangement:** To sustain the new workforce model for the long-run, retailers need to move away from viewing such alternate workforce models as simply a stopgap measure and instead, think about opportunities to redesign full-time roles to provide greater flexibility.

Manpower Best Practices

5 Redesigning Job Roles for Transformation

As retail shifts towards an omni-channel retail journey with the desire for a more seamless customer experience, some jobs will fundamentally change. Retailers have to assess their level of maturity in adopting the various new retail models, and design job roles that drive operational capabilities and fulfill customer needs.

Job roles that currently adopt new retail models are designed to take on responsibilities in addition to their current role, or take on 'ad-hoc' roles that are designed without increasing headcount. While these roles can support operations, they may become irrelevant as business models scale, creating challenges as retailers take on new levels of transformation in the future.

Challenges or trends this recommendation responds to:

- Transformation fatigue
- New retail model
- Automation and data
- Future-proofed supply chain

What is job redesign in retail?

Job redesign involves understanding how the job role can evolve, to improve productivity or insert tasks that provide greater value for the retailer. The retail sector faces multiple workforce challenges, such as integrating online and offline sales channels. Retailers have to relook into existing job roles, and modify its tasks to align and respond to changing pressures (e.g. integrating aspects of online and offline sales fulfilment into a role to account for omni-channel sales).

Job enlargement (multi-dimensional jobs): Addition of tasks that are of **similar responsibilities** as a result of megatrends and consumers needs.

| Existing task | Additional tasks with similar responsibilities | | Job enlargement |

Job enrichment: Addition of tasks that are **more demanding and complex** as a result of megatrends and consumer needs.

| Existing task | Addition of more demanding tasks | | Job enrichment |

269
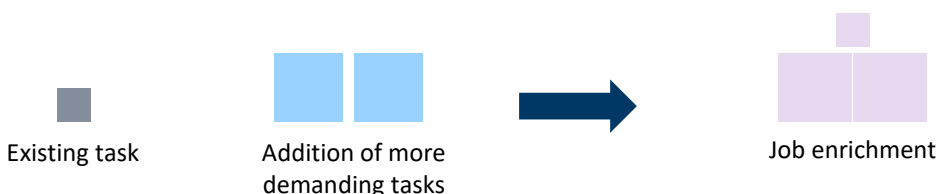
Manpower Best Practices

5   Redesigning Job Roles for Transformation

What is job redesign in retail?

Complemented, augmented or displaced by technology: Changes in job tasks due to technology implemented, trends and consumer needs.

Existing tasks → Technology implemented → Complemented   or   Augmented [New]   or   Displaced

Job redesign is becoming a key enabler for retailers to evolve their existing job roles and take on new and multi-dimensional tasks as they embark on new business challenges (e.g. omni-channel sales and inventory, livestreaming).

Existing tasks   As existing tasks are revised…   Envisioning the new tasks

Merchandising Executive
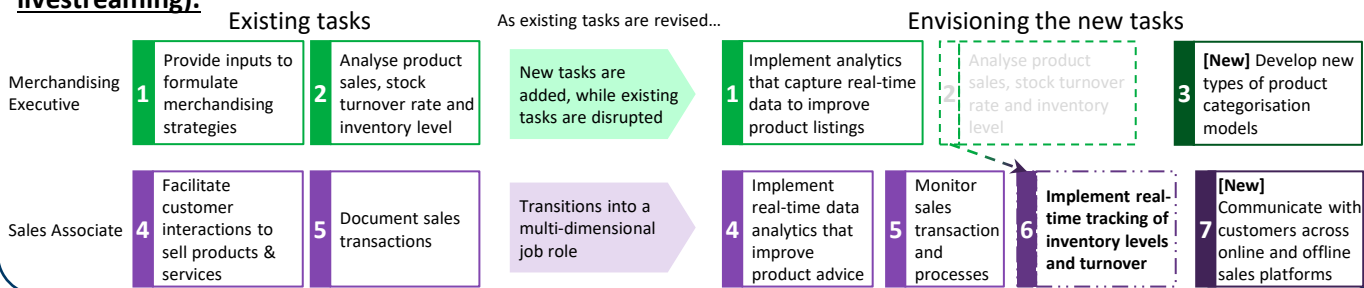1. Provide inputs to formulate merchandising strategies
2. Analyse product sales, stock turnover rate and inventory level

New tasks are added, while existing tasks are disrupted

1. Implement analytics that capture real-time data to improve product listings
2. Analyse product sales, stock turnover rate and inventory level
3. [New] Develop new types of product categorisation models

Sales Associate
4. Facilitate customer interactions to sell products & services
5. Document sales transactions

Transitions into a multi-dimensional job role

4. Implement real-time data analytics that improve product advice
5. Monitor sales transaction and processes
6. Implement real-time tracking of inventory levels and turnover
7. [New] Communicate with customers across online and offline sales platforms

What would successful job redesign look like in the retail sector?

Strengthen manpower efficiency

Job redesign should enable companies to streamline operations, while ensuring the business remains operationally productive. Retailers have to identify roles that are ready for expansion and change, ensuring incumbents can take on added responsibilities while maintaining their efficiency in current tasks available. The added tasks should have minimal disruption to current daily activities of the employees, and employees must be receptive and open to change.

Companies incorporating new technology and capabilities, such as online-to-offline-to-online fulfilment, have to introduce new e-commerce sales fulfilment activities into retail operation roles. Retailers have to **consider key factors** such as current workload, time savings and productivity gain **to ensure evolved roles serve to support their business**.

Support evolving retail transformation

Companies should constantly review the current job roles available, and evaluate how current roles are sufficient in ensuring operational capabilities that meet the future of retail. Retailers have to evaluate and decide on key functions that would drive digitally enabled processes, while delivering services that meet the evolving demands of retail.

Sephora has introduced new retail concepts such as **'Store of the Future'** to adapt to evolving consumer demands, where stores are equipped with digital tools that enable an interactive retail experience for its customers. The store concept relies on service staff with strong digital and customer service skills, which are reimagined based on existing perceptions of service staff only providing transactional services for the customers.

Note:
1 – Full detailed descriptions of changes in each job roles can be found in Chapter 6: Jobs & Skills Transformation

5 Redesigning Job Roles for Transformation

What can retailers do to drive effective job redesign?

Jobs in the retail sector can be redesigned based on the proposed impacts found in Chapter 6: Jobs and Skills. Retailers can consider three key steps when evaluating how job functions and roles can be improved.

1
___
DIAGNOSE

Determine WHO should undergo Job Redesign and WHY
- Identify job roles that will need to be redesigned. Retailers can refer to Chapter 6 to determine which roles may be highly impacted and types of impact.
- Analyse current role in terms of types of tasks and activities being performed and potential for manual and repetitive tasks to be redesigned. Utilise tools such as time-task survey and observational studies to identify inefficiencies in existing roles.
- Determine current business strategies and operating models and potential to introduce technology or process improvements in the job role.
- Understand the current employee sentiments of the work processes, discovering key challenges and opportunities in the job role.

2
___
DESIGN & DEVELOP

Decide on HOW job redesign could look like
- Research for potential solutions that could make the job role more efficient. Solutions may include process redesign, technology implementation and job role transformation.
- Estimate impact on the job role in terms of attractiveness of the role, time savings, revised job descriptions, key activities, tasks and skills required.

Communicating the unique value proposition of Retail Operations roles through Job Redesign:

Retailers looking to attract workers should continue to uplift its overall employee value proposition (EVP). A key aspect of EVP is the desire for meaningful work, and as such, retailers must determine what meaningful work entails within the retail sector. When redesigning job, retailers should keep in mind that meaningful work may look different for different employees and communicate effectively to attract and retain them.

Individuals interested and capable of delivering greater contributions	**Individuals with extensive work experience and looking to influence business decisions**	**Individual excited to share product knowledge and engage with customers**
Design the role for employees to take on multi-dimensional work across retail value chains (e.g. Sales associate managing e-commerce/in-store sales enquiries).	Provide greater autonomy for employee to make decisions (e.g. Sales associate involved in designing customer engagement guidelines, having the ability to make judgements and approve customer service requests).	Empowering them with resources, information and data to deliver excellent customer service (e.g. focus on service delivery, utilising customer insights to support customers throughout the customer journey).

Manpower Best Practices

5   Redesigning Job Roles for Transformation

What can retailers do to drive effective job redesign?

3
—
E N A B L E

Pilot, iterate and plan ahead
- Conduct pilot for job redesign before scaling to entire organisation. This enables retailers to evaluate feasibility of solutions and ROI and determine any challenges to manage.
- Based on pilot outcomes, retailers should review and identify areas for improvement.
- Develop clear implementation plan with guides to help managers and incumbents manage changes during job redesign.

What are some considerations for retailers?

When developing redesigned job roles and functions, there are a few key considerations for retailers to note of:

- **Staying updated on latest technology and consumer trends:** Retailers have to constantly identify trends and improvements in the sector, and ensure workforce remains competent and agile that can respond to future challenges.

- **Collaborative efforts between the retailers, associations and digital agencies:** Retailers can work with retail associations, government agencies and emerging digital solution providers to design and develop digital capabilities to tackle challenges brought about by new retail models.

- **Importance of driving human capital improvement:** The changes in job redesign identifies gaps in the skills required by the employees, and this drives process improvements in training, compensation and performance management strategies that enable and encourage employees to take on long-term personal development changes. It is important for retailers to prepare their managers and HR teams to manage the changes implemented.

Resources for retailers

SkillsFuture Skills Framework
- The Skills Frameworks and the JTM report (e.g. Chapter 6: Job and Skills) provide retailers an understanding of roles currently available in the retail sector, as well as potential emerging job roles as the retail industry evolves.

8

Appendix

8.1	Guide for Small & Micro Enterprises
8.2	References

Overview of Small and Micro Retailers in the Sector

Overview of small and micro retailers in the sector

Small and micro-retailers are defined by retail businesses with not more than SGD $10million revenue and they make up approximately 98.3%[1] of the Singapore retail sector, based on number of enterprises.

Key challenges faced by small and micro-retailers in retail sector

Competition from larger retailers

Small and micro retailers are facing immense pressures from larger retailers in the market.

Because of their limited size, these retailers are disadvantaged in terms of purchasing power and economies of scale, resulting in a difficulty to offer competitive prices.

Besides facing competition from large retailers, small and micro retailers who are not digitally-savvy are also facing competition from online rivals.

Limited resources

Small and micro retailers do not have the financial resources to invest in new technology or build new capabilities which can make it difficult for them to optimise their operations and compete effectively.

This could be especially challenging when it comes to reaching customer and growing revenue. Many small and micro-retailers are limited in terms of their ability to reach their target audience across various channels.

Manpower shortages

Small and micro-retailers are faced with the significant manpower shortage challenges. This stems from difficulties in attracting and retaining talents for the long-term due to perception of retail work, long working hours, and challenges in hiring talents with the right skillsets.

As a result, many small and micro-retailers are relying on current incumbents double-hatting certain roles or outsourcing work to third parties.

Limited capabilities in job redesign & upskilling

As the competition for talent continues, small and micro-retailers must consider redesigning existing roles to be more valuable and investing in key skills for long-term success.

However, these retailers may encounter challenges in implementing these changes, including identifying which critical skill sets to prioritise and how to redesign jobs for increased productivity.

"For micro SMEs that deal with a large amount of SKUs/commodities, technology implementation could be challenging due to high cost of implementation. Hence, there is still an expectation to perform work manually." [2]

- Supermarket Retailer with 250-300 employees

"Currently SMEs are unable to justify costs for emerging roles (e.g., data analytic roles), it would be helpful if there were subsidies to try out new roles for 6 months, and only offer conversion if successful." [2]

- Fashion Retailer with 150-200 employees

Note:
1 – Singapore Department of Statistics, 2021
2 – Quotes from Mercer's Industry Engagement (SME), 2022

Trends Spotlight for Small & Micro Retailers

Trends for small & micro retailers

Small and micro retailers are facing competition from larger retailers and global competitors, which requires them to adapt and evolve their operations. To achieve this, there are several important trends that SMEs should focus on, including:

Key Trends	Focus areas for SMEs
Consumer of the Future **Sustainability Surge** • Consumers are becoming more conscious in their purchasing and consumption behaviours, favoring brands that prioritise environmental responsibility. **Brand Conscious** • The stiff market competition has made it important for brands to establish its own identity to maintain customer loyalty. **Lifestyle Changes** • Social media has made it easy for consumers to exchange reviews and feedback. As such, consumers are becoming more knowledgeable and informed about products.	• Sustainability encompasses various aspects, including both operational practices and ways of working. Small and micro-retailers can start by identifying some **cost-effective ways to embed sustainability** into operations such as providing incentives for sustainable behaviours (e.g., customers who bring their own bags) or educating employees on sustainability and how to address related queries. • Small and micro-retailers will need to prioritise branding, focusing on **creating a differentiated brand with a distinct message**. Starting with defining brand identity and communicating the brand through social media. • Consumers are increasingly knowledgeable and more inclined to provide reviews and small and micro-retailers must be **equipped with ability to respond promptly**. Unlike large brands, small and micro-retailers may face greater risk of reputational damage if they fail to handle such situations.
Automation & Data **Automation Integration** • Automated tools can help to reduce reliance on manpower, replacing manual tasks such as stocking and shelving products. **Digital Capabilities** • Investing in other digital capabilities such as introducing e-payment, enhancing social media marketing capabilities and introducing digital visual merchandising.	• Small and micro-retailers must embrace **digitalisation and automation** to overcome manpower challenges and provide a seamless customer experience. For example, some retailers have adopted e-payment methods, allowing customers to make direct payments online by scanning QR codes, which provides a smoother and more convenient experience for customers. • Small and micro-retailers should also enhance their **digital marketing capabilities** to extend reach to customers via social media. Social media creates a level playing field for small and micro-retailers and helps to get their messages out to the right target audience.

Trends Spotlight for Small & Micro Retailers

Key Trends	Focus areas for SMEs
New Retail Model **E-commerce Capabilities** • With the increasing popularity of online shopping, small and micro-retailers are facing intensified competition and must expand their customer base beyond local markets. E-commerce could provide a cost-effective way to enter new markets. • Small and micro-retailers can consider various options to embark on their e-commerce journey, from selling through third-party marketplaces to building their own webstores or selling through clickable ads on social media.	**Brick-and-mortar** • Consider which e-commerce platform best aligns with business' goals, budget and technical expertise. • Many small and micro-retailers may prefer to sell through **third-party marketplaces** which require lower cost requirements with an extensive reach. **Hybrid Retail** • Focus on **integrating offline and online operations**. This could include offering in-store pickup, providing information on products on both online and offline platforms and using data from online channels to inform offline sales decisions. **Online-only** • For pure-play small and micro-retailers, priority should be placed on **enhancing online customer experience** such as providing personalised product recommendations and driving internationalisation strategy.
Future-Proofed Supply Chain **Last-mile Delivery** • Last-mile delivery forms an important part of customer experience in shopping. Small and micro-retailers need to ensure a satisfactory experience for their customers. **Inventory Management** • Accurately managing inventory levels can prevent stockouts or overstocking which can have significant impact on revenue. **Returns & Exchanges** • Many small and micro-retailers may not have a physical storefront or policies and procedures to manage returns and exchanges efficiently.	• Small and micro-retailers should consider whether they have the capability to handle delivery independently or if **outsourcing** is a more viable option. Additionally, they must take into account the shipping costs and determine whether they can offer free or low-cost shipping options. • Given the resource and cash flow constraints of small and micro-retailers, effective **inventory management** becomes particularly important in helping them to avoid overstocking, manage cost related to storage and handling and help to better forecast future demand. • Customers expect retailers to offer returns and exchanges, especially for products purchased online. For small and micro-retailers, having **transparent policies or procedures** on returns and exchanges can help to retain customer loyalty and differentiate themselves from competitors.

Jobs & Skills Impact

Key drivers of jobs and skills transformation

The trends and challenges that small and micro retailers face in the sector mean that job roles must adapt to meet evolving demands. The key themes of job role transformation are outlined below:
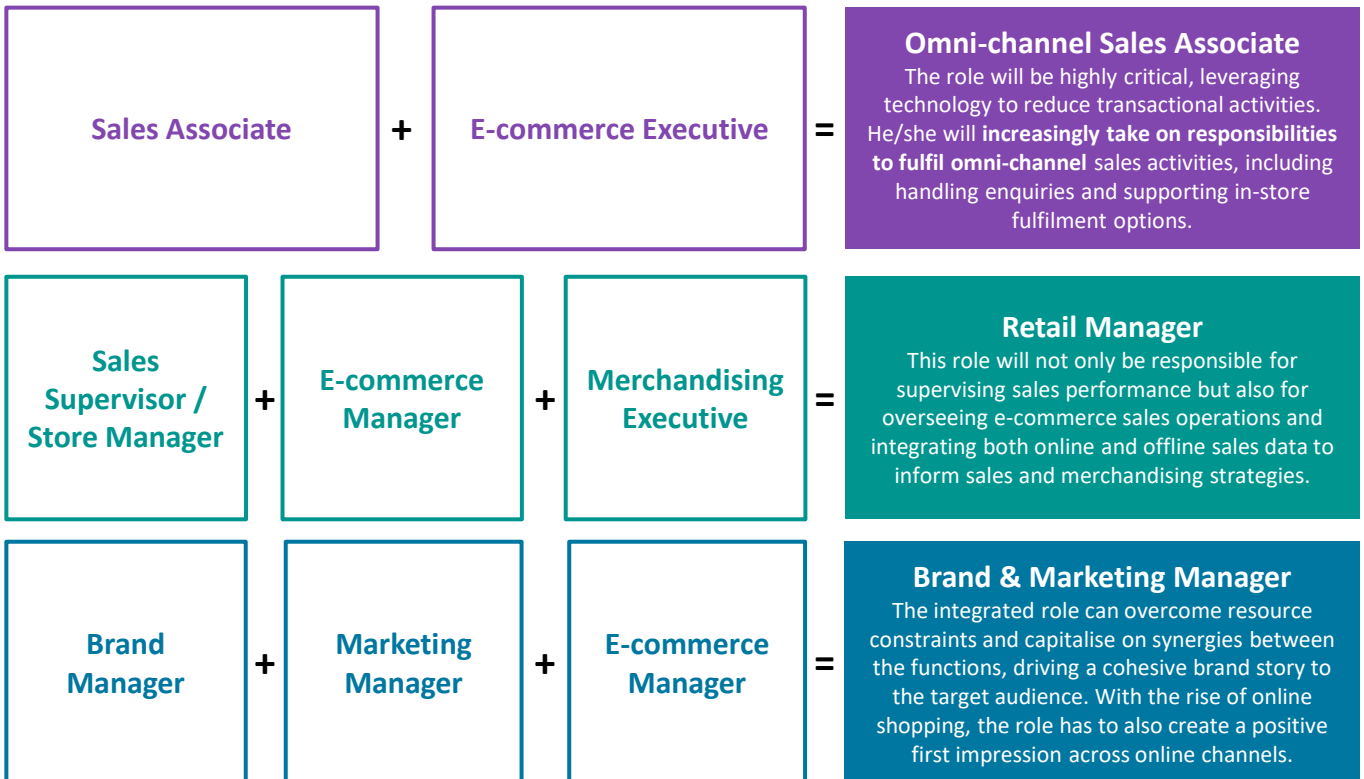
- **Multi-dimensional retail roles**
- **Customer at the core of retail roles**
- **Data-driven decision making**
- **Leveraging technology to create higher-value retail roles**

Key job roles impacted

Faced by resource constraints and limited scale, many small and micro-retailers may choose to **merge several roles' responsibilities into a single role.** This helps to create an organisation that is leaner where employees develop cross-functional skills.

Sales Associate	+	E-commerce Executive	=	**Omni-channel Sales Associate** The role will be highly critical, leveraging technology to reduce transactional activities. He/she will **increasingly take on responsibilities to fulfil omni-channel** sales activities, including handling enquiries and supporting in-store fulfilment options.
Sales Supervisor / Store Manager	+ E-commerce Manager	+	Merchandising Executive	= **Retail Manager** This role will not only be responsible for supervising sales performance but also for overseeing e-commerce sales operations and integrating both online and offline sales data to inform sales and merchandising strategies.
Brand Manager	+ Marketing Manager	+	E-commerce Manager	= **Brand & Marketing Manager** The integrated role can overcome resource constraints and capitalise on synergies between the functions, driving a cohesive brand story to the target audience. With the rise of online shopping, the role has to also create a positive first impression across online channels.

Jobs & Skills Impact

We outlined the anticipated changes and necessary skillsets for the identified job role, which can serve as a reference for redesigning existing job roles to meet the desired objective.

Sales Associate	This role remains a critical role for small and micro-retailers, acting as the primary point-of-contact in stores. Transactional tasks are expected to be replaced by more complex activities such as addressing e-commerce queries and managing product availability.

Revised job tasks of a Sales Associate		
Critical Work Function	**Tasks previously performed by**	**Envisioned Job Tasks**
Deliver service excellence	Retail Operations	• Troubleshoot issues and assist consumers as they interact and face difficulties with POS systems. • Perform maintenance checks on in-store technology and applications, escalating issues when necessary.
Achieve sales	Retail Operations	• Ensure relevant consumer data are recorded or stored on digitalised customer-relationship management (CRM) systems, to manage sales performance and better understand customers' purchases. • Review customer feedback in order to manage in-store product displays and product offered. • Provide personalised product recommendations for customers based on the understanding of historical customer interactions.
Deliver operations excellence	E-commerce	• Communicate with customers via text on third-party sales platforms and social media, providing frequent customer touchpoints to drive sales. • Monitor and handle fulfilment of customers' orders across all relevant platforms, including digital or in-store sales (e.g. online-to-offline fulfilment, subscription services).
	E-commerce; Retail Operations	• Manage the product availability across online and offline sales channels, answering queries from online sales channels.
	Logistics & Supply Chain	• Manage outbound delivery operations together with third-party logistics providers to manage online and offline sales fulfilment processes (e.g. purchasing & returns), to ensure products are delivered and returned promptly.

278

Jobs & Skills Impact

We outlined the anticipated changes and necessary skillsets for the identified job role, which can serve as a reference for redesigning existing job roles to meet the desired objective.

Sales Associate	This role remains a critical role for small and micro-retailers, acting as the primary point-of-contact in stores. Transactional tasks are expected to be replaced by more complex activities such as supporting e-commerce operations such as addressing queries and managing product availability.

Revised job tasks of a Sales Associate

In-demand skills for development	
After-sales Service	Order Fulfilment Administration
Customer Relationship Management Operations	Product Advisory
In-store Digital Application and Assistance^	Service Excellence
Omni-channel Management^	Service Leadership

Note:
^Skills not in any Skills Framework

Jobs & Skills Impact

We outlined the anticipated changes and necessary skillsets for the identified job role, which can serve as a reference for redesigning existing job roles to meet the desired objective.

Retail Manager	The Retail Manager is a pivotal role in overseeing sales performance for small and micro-retailers. For small and micro-retailers, this role may also be involved in monitoring online sales performance and utilising data (.g., sales data, online customer engagement) to shape overall sales and merchandising strategy.

Revised job tasks of a Retail Manager

Critical Work Function	Tasks previously performed by	Envisioned Job Tasks
Deliver service excellence	Retail Operations	• Implement and review sales monitoring / CRM software, to ensure that the store provides streamlined sales processes and drive high quality service standards to meet the consumer demands. • Review sales, customer and purchasing behaviour data, to identify performance insights that formulate new sales initiatives.
Achieve sales	Retail Operations	• Research and review the relevance of new store concepts and technology available, to ensure stores operate efficiently and are attractive to changing consumer demands. • Train retail operations staff on new product launches, and operate new technology and sales channels.
	Merchandising	• Review merchandising strategies and KPIs, based on evolving market trends, developing the information required that help identify products optimised for market fit.
Deliver operations excellence	E-commerce; Retail Operations	• Lead projects that will drive the business towards adopting partial or full omni-channel capabilities. • Spearhead the integration of digital and offline sales channels, creating sales processes that focus on providing good customer experience across all sales channels.

In-demand skills for development

Business Performance Management	Process Improvement
Customer Relationship Management Operations	Product Styling
In-store Digital Application and Assistance^	Omni-channel Management^
Merchandise Performance Analysis	Omni-channel Strategy^

Note:
^Skills not in any Skills Framework

Jobs & Skills Impact

The multiple responsibilities of a Brand & Marketing Manager are designed based on its distinct job functions. It is important that retailers drive a consistent brand image through its communication strategies, to remain competitive in meeting consumer demands and capturing their attention.

Marketing: Communicates the brand story, utilising brand visuals and messages developed by brand management teams, to generate and nurture leads that purchase the product or service.

Brand Management: Designs consistent brand guidelines across all communication collaterals (e.g. online, offline, visual and text). The team ensures the designs and values are widely recognised and associated with the brand.

Brand & Marketing Manager	The Brand & Marketing Manager can **overcome resource constraints and capitalise on synergies** across functions. Retailers are also increasingly **integrating e-commerce with the brand and marketing functions**, as the rise of online shopping drives the need to leave a positive first impression and experience through digital touchpoints.

Revised job tasks of a Brand & Marketing Manager

Critical Work Function	Tasks previously performed by	Envisioned Job Tasks
Drive Brand Equity	Brand Management	• Develop branding and customer retention plans through the analysis of customer buying patterns and product insights across all relevant sales platforms. • Generate insights and trend reports to convert new branding opportunities. • Implement brand management tools (e.g. digital asset management, content templates) to drive targeted and effective brand messages across different target audience.
Drive Customer Relationship Management	Marketing	• Maintain a database of customer information to gain insights on various types of customer segmentation, to deliver effective, tailored marketing messages to the respective customer segments.
	Brand Management	• Develop strong brand communities (e.g. in-person events, online forums) and manage hyper-personalised communications with consumers (e.g. emails, direct messages).
Drive Marketing Campaigns	E-commerce; Marketing	• Develop marketing content that is consistent and attractive across online and offline platforms, such as in-store and website sales promotions. • Create omni-channel marketing campaigns that integrate offline and digital sales touchpoints smoothly (e.g. access to online stores featured on in-store promotions), offering multiple sales opportunities for the consumers. • Develop social media strategies that foster direct relationships with consumers, enhancing and establishing effective brand partnerships.

8.1 Bite-Sized Guide for Small & Micro Enterprises

Jobs & Skills Impact

Brand & Marketing Manager	The Brand & Marketing Manager can **overcome resource constraints and capitalise on synergies** across functions. Retailers are also increasingly **integrating e-commerce with the brand and marketing functions,** as the rise of online shopping drives the need to leave a positive first impression and experience through digital touchpoints.
	Revised job tasks of a Brand & Marketing Manager

In-demand skills for development	
Brand Campaign Management	Customer Relationship Management
Brand Storytelling^	Digital Marketing Management
Customer Behaviour Analysis	Market Trend Analysis
Customer Experience Management	Social Media Management
Customer Loyalty and Retention Strategy Formulation	Social Media Marketing

Note:
^Skills not in any Skills Framework

Critical Workforce Transformations for Small & Micro Retailers

Through our employee survey findings[1], retail employees and job seekers had numerous reasons for joining and staying in a retail organisation. Given the context and perspectives shared by small and micro retailers, we identified three key factors that small and micro retailers can focus on to improve its value proposition for current employees and job seekers.

Value Of Strong Brand

- **63%** of respondents indicated preference to join **brand owners.** Job seekers acknowledged the growth in direct-to-consumer retail brands and showed greatest interest in joining such retailers.

- Job seekers also flagged out that the sector's branding and image needs to be improved to attract and retain them in the sector.

Lack of Work-Life Balance

- **The lack of work-life balance has been cited as the top reason** why employees may leave the retail sector.

- In particular, employees mentioned that they would like a **more flexible working schedule**, more **break time** for employees during work, and **shorter working hours.**

Lack of Career Progression

- Only **3 in 5** retail employees understand the potential career paths available in their current retail organisation.

- Similarly, only **64%** felt that their career goals could be met in the current organisation.

- This indicates limited understanding of career opportunities in the retail sector and a need for retailers to better educate employees' on career progression.

Small and micro retailers can provide a unique employee value proposition by doubling down the efforts to create a strong brand, providing distinct career opportunities and leveraging on new workforce models and talent pools.

Anchoring on a Strong Brand

Build a strong brand that appeals to customers, job seekers and employees. Having a strong brand enables small and micro retailers to differentiate themselves, enhancing their visibility and opportunities to attract talents.

Alternate Workforce Models

Small and micro retailers can explore alternative talent pools to fulfill certain tasks, which can be critical due to resource constraints and a lack of specific capabilities that can be filled by qualified gig workers.

Job Redesign

Analyse current job roles and identify opportunities to uplift the value of existing job roles through job redesign. Consider automating routine and repetitive tasks to create capacity for more value-added activities.

Note:
1 – Mercer's Retail Manpower Study Surveys

Anchoring on a Strong Brand

Importance of a strong brand for small & micro retailers

A strong brand not only enhances competitiveness but also shapes job seekers' perceptions of what it would be like to work with the brand. This is especially crucial for small and micro retailers, and there are a few reasons for this:

In a competitive sector, having a **strong brand is perhaps one of the most important asset** for resource-constrained small and micro-retailers.

Having a strong brand enables small and micro-retailers to **establish their presence** in the sector and **enhance their visibility** towards job seekers.

Harness the advantages of being a small and micro retailer. Small and micro retailers are in a good position to offer **unique career opportunities** for employees.

For instance, they could offer a more **flexible culture** with greater autonomy for employees, provide more **diverse opportunities for employees** to grow and explore different work and to be part of a **high-growth team.**

What can small & micro retailers do to build a strong brand?

- Consider whether the brand has a unique identity and position that differentiates itself from competitors. A strong brand identity should be reflected across its vision, mission, and values.
- Conduct surveys or speak with customers, employees or job seekers to assess their awareness and general perceptions of the brand to identify any gaps.
- Utilise various channels (e.g. websites, job postings, and other recruitment materials) to communicate with diverse groups on brand's position and message.
- Ensure that the employer's brand is consistent with the overall brand story, as employees are often the most effective advocates for their companies.

Alternate Workforce Models

What are the talent pools[1] available in retail?

	Motivation	Working arrangement preferences [Length of time looking to spend in the industry]
Students 16-25 years old	To earn extra pocket money for daily expenses. Trending brands with a large market presence would likely interest this talent pool.	Part time/gig workers , short-term hires during the school holidays [1-3 years]
Fresh ITE/polytechnic graduates 19-23 years old	To gain working experience for career development opportunities.	Part time, weekends, internships, long term career opportunity [10+ years]
Semi-retired adults 60+ years old	To remain active and socially connected.	Part time, weekdays, long term [5-10 years]

What would new workforce models look like in the retail sector?

Shift-based Workforce Model
Employees assigned to a single store with a **full-time, part-time or seasonal schedule.**

Part-time
Work schedule that is performed for periods of time shorter than usual hours

Shift-Based
Work schedule that is performed for specific recurring periods (e.g., night shifts)

Seasonal
Work schedule that is performed based on demand (e.g., holidays, sales period)

Task-based Workforce Model
Employees performed **specific tasks** in a flexible, contract-based arrangement.

Example: Replenishing Stocks

A   *Identifying stocks with low quantity*

B   *Determining amount to restock based on data*

C   *Checking inventory for stock supply*

D   *Filling stocks on shelf*

Gigable Tasks

Retailers could break down activities into single tasks and identify which could be outsourced to gig-economy workers to reduce demands on full-time employees.

What can retailers do to adopt new workforce models and unlock talent pools?

- **Understanding manpower gaps and identifying suitable alternatives:**
  - Define the current roles that are facing shortages and identify the types of activities performed.
  - Explore if these activities could be performed by alternate talent pools such as non-full time (non-FT) employees (e.g. part-timer, contractor or gig workers).
- **Changing the perceptions of part-time/gig employment:**
  - Communicate the importance of non-FT employees as an essential part of the workforce.
  - Create opportunities for integration including team activities, training and other developmental opportunities.
  - Develop compelling reasons for talent pools to take on non-FT roles, focusing on providing them fair benefits and opportunities for career growth and recognition.

Note:
1 – Mercer's Retail Manpower Study Surveys and Industry Engagements
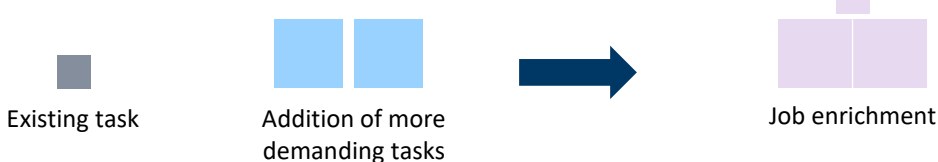
Job Redesign

Job redesign for small & micro retailers

Job redesign involves understanding how the job role can evolve, to improve productivity or insert tasks that provide greater value for the retailer. For small and micro retailers, job redesign can help to **alleviate challenges of manpower shortages by automating high-volume manual tasks,** and creating more **exciting roles** that could enhance employee engagement and talent retention in the long run.

Job enlargement (Multi-dimensional jobs): Addition of tasks that are of **similar responsibilities** as a result of megatrends and consumers needs.

Existing task	Additional tasks with similar responsibilities	Job enlargement

Job enrichment: Addition of tasks that are **more demanding and complex** as a result of megatrends and consumer needs.

Existing task	Addition of more demanding tasks	Job enrichment

Complemented, augmented or displaced by technology: Changes in job tasks due to technology implemented

Existing tasks	Technology implemented	Complemented	or	Augmented New	or	Displaced

How can Small & Micro Retailers embark on Job Redesign?

- Leverage government support through Productivity Solutions Grant to conduct Job Redesign projects.
- Determine potential job roles that could be redesigned (key roles were listed earlier in this section) and analyse the current roles in terms of volume of manual and repetitive tasks.
- Explore solutions that could enhance efficiency of the role – this can range from small, cost-effective solutions to large-scale technology implementation. Identify which solutions best meet your current organisation's needs.
- Pilot these solutions and evaluate its feasibility and ROI.
- For job roles that are impacted by Job Redesign, be sure to continually communicate to employees about the benefits of the redesigned role, such as performing complex activities and opportunities for upskilling and career advancement.

Supporting Retailers on the Transformation Journey

Current initiatives

PSG-JR
- Job Redesign Framework for Retail to access self-help resources such as comprehensive templates to implement job redesign and recommended pre-fitted solutions.

WSG has worked with industry partners to develop sector-specific solutions that streamlines business processes and build new capabilities to enhance workforce productivity.

SBF MAP
- Support businesses in identifying and streamlining problem statements to boost productivity, and embark on programmes with SBF or its partner agencies that best fit their objectives

SBF and GIC are offering fully funded online learning programmes for SME leaders and SME to prepare themselves and their organisations to address business-specific challenges and explore new possibilities.

Service Industry Transformation Programme (SITP)
- Administered by SGPC, the SITP seeks to help enterprises in the lifestyle sectors become more productive and manpower-efficient
- Participants will undergo classroom training to provide them a foundation of key concepts by SGPC's certified consultants followed by 1-to-1 project guidance with individual companies
- They will embark on either a Digitalisation or Service Design project, or both

The programme supports lifestyle sector companies to uplift organisational capabilities in innovation, job redesign and manpower planning.

Heartlands Go Digital
- The Heartlands Go Digital initiative was launched to support heartland enterprises in digital adoption, storefront enhancement and development of marketing skills to prepare your business for future challenges

Comprises of the following solutions:
- **E-payment**: Go contactless with e-payment platforms such as Fave, Grab, NETS and Allinpay at affordable rates.
- **Visual merchandising**: Receive 70% funding support and one-on-one guidance to refresh your store layout and design, develop capabilities in basic digital and visual merchandising, and create materials for online/offline marketing and promotion.

Capability Transfer Programme
- The programme seeks to improve local-foreign workforce complementarity by facilitating the transfer of capabilities from foreign specialists to locals to encourage a culture of pervasive capabilities transfer across all sectors and entities
- Companies to develop and acquire new capabilities in Singapore by ensuring that there is sustainable supply of Singaporeans with the requisite skillsets
- Funding support include attachment-related costs and salary support for foreign and local specialist, as well as Singaporean trainees on overseas attachment to acquire new capabilities
- Will include support for the transfer of capabilities through remote training from foreign specialists

The programme facilitates the transfer of global capabilities to your local workforce.

Note:
List of resources available are non-exhaustive and subjected to changes

Looking Ahead for Small and Micro-Retailers

Internationalisation for small and micro-retailers

With a large influx of global brands, the retail sector is becoming increasingly competitive, and small and micro-retailers must remain competitive by broadening their customer base through internationalisation. Here are some tips and considerations for small and micro-retailers:
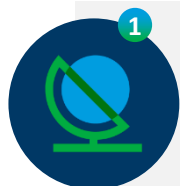
1 **Conduct research on potential markets**
- Small and micro-retailers should start by shortlisting potential markets that are closer in proximity and culture to Singapore.
- To get insights on these potential markets, small and micro-retailers can conduct preliminary research online on market conditions and consumer trends, speak with other retailers to learn from their experiences, or explore resources available on EnterpriseSG's Go Global website.

Identify market entry approaches
- E-commerce is a cost-effective approach for small and micro-retailers to enter a new market, as it reduces the investment and risks associated with market entry. They can consider leveraging third-party marketplaces or building their own webstore.
- To maximise the benefits of e-commerce, it is important for small and micro-retailers to complement this approach with social media marketing strategy.

2

3 **Build a strong brand**
- Ensure that brand remains consistent across the different regions so that consumers are clear as to what the brand represents.
- A critical aspect of branding is the customer experience, so it is essential to maintain consistent service standards across regions, while being mindful of different cultural expectations.
- Build brand loyalty by introducing rewards systems, offering returns and exchange services and building community around the brand online.

Partner with local players
- Small and micro-retailers can benefit from partnerships with local third-party logistics vendors or collaborations with similar brands, as it can help them quickly adapt to the local market conditions and consumer trends, while optimising their business operations.
- Furthermore, through partnerships, small and micro-retailers could establish its credibility with local customers.

4

288
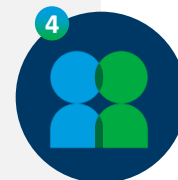
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Agencies, Associations and Institutes of Higher Learning

S/N	Name	S/N	Name
1	Economic Development Board	7	Singapore Institute of Retail Studies
2	Enterprise Singapore	8	Singapore National Employers Federation
3	Institute of Technical Education	9	Singapore Retailers Association
4	Ministry of Trade and Industry	10	Singapore Tourism Board
5	Ngee Ann Polytechnic	11	Singapore University of Social Sciences
6	Singapore Business Federation	12	Workforce Singapore

Retail Organisations

S/N	Company Name	S/N	Company Name
1	Aspial Corporation Ltd	18	Don Don Donki (Pan Pacific International Holdings)
2	Atomi Pte Ltd	19	Elush Retail Group Pte Ltd
3	Benjamin Barker Pte Ltd	20	Estee Lauder Cosmetics Pte. Ltd.
4	Best Denki Singapore Pte Ltd	21	G2000 (Wing Tai Retail)
5	BHG Singapore Pte Ltd	22	Gain City Best-Electric Pte Ltd
6	BRG (S) Pte Ltd	23	Great United Goldsmith & Jewellery Pte Ltd
7	By Invite Only Pte Ltd	24	Harvey Norman Singapore Pte Ltd
8	C. K. Tang Pte Ltd	25	Herbal Pharm Pte Ltd
9	C&J Clarks (S) Pte Ltd	26	Hean Lee Radio Service Pte Ltd
10	Cash Converters (Asia)	27	HoneyWorld (Swift Health Food Singapore Pte Ltd)
11	Catalogs Pte Ltd	28	Ikea (Ikano Pte Ltd)
12	Charles & Keith (Singapore) Pte Ltd	29	Inditex (Al Futtaim Group)
13	Choicecycle CCTV Pte Ltd	30	IUIGA Technologies Pte Ltd
14	Commune Lifestyle Pte Ltd	31	Kinokuniya Book Stores Of Singapore Pte Ltd
15	Courts Singapore Pte Ltd	32	Klosh Pte Ltd
16	DFI Retail Group Holdings Limited	33	Lagardere Travel Retail Pte Ltd
17	DMK (Singapore) Pte Ltd	34	Lemongrass House Singapore Pte Ltd

	Retail Organisations		
S/N	**Name**	**S/N**	**Name**
35	L'Oreal Singapore Pte Ltd	61	Sephora Singapore Pte Ltd
36	Lotte Travel Retail Singapore Pte Ltd	62	Sheng Siong Supermarket Pte Ltd
37	Lush (Sash Tural Pte Ltd)	63	Shilla Travel Retail Pte Ltd
38	Marks & Spencer (Singapore) Investments Pte Ltd	64	Sing Chye Heng Investment Holdings Pte Ltd
39	Merlin Goldsmith & Jewellery Pte Ltd	65	SK Jewellery Pte Ltd
40	Metro Holdings Ltd	66	Skechers Singapore Pte Ltd
41	Mighty Velo Pte Ltd	67	Star Furniture Pte Ltd
42	MoneyMax Financial Services Pte Ltd	68	Starbucks Coffee Singapore Pte Ltd
43	Mothercare (Kim Hin International Pte Ltd)	69	Supermama Store Pte Ltd
44	Nike Singapore Pte Ltd	70	Swarovski Singapore Trading Pte Ltd
45	NTUC Fairprice Co-operative Ltd	71	Swift Health Food (Singapore) Pte Ltd
46	On Cheong Company Pte Ltd	72	Takashimaya Singapore Pte Ltd
47	Orient Photo Pte Ltd	73	Tempur Singapore Pte Ltd
48	Osim International Pte Ltd	74	The Body Shop (Singapore) Pte Ltd
49	Outdoor Venture Pte Ltd	75	The Eyecare Initiative – Optical Pte Ltd
50	Pazzion International Pte Ltd	76	The Green Collective SG Pte Ltd
51	Pet Lovers Centre Pte Ltd	77	The Hour Glass Ltd
52	Prime Supermarkets Ltd	78	The Toy Folks
53	PRISM+	79	Tily Tea (Tily Pte Ltd)
54	QB Net International Pte Ltd	80	ToTT (Sia Huat Pte Ltd)
55	Radha Export (Value Dollar) Pte Ltd	81	U Stars Supermarket Pte Ltd
56	RISIS Pte Ltd	82	Under Armour (UA Sports SEA Pte Ltd)
57	Running Lab Pte Ltd	83	Unilever Singapore Pte Ltd
58	Saturday Club Pte Ltd	84	Wing Tai Retail Pte Ltd
59	SCANTEAK	85	Xpressflower.com Pte Ltd
60	SecretLab SG Pte Ltd	86	Yue Hwa Chinese Products Pte Ltd