



| RPI

Singapore Grocery Retailer Preference Index 2021

dunnhumby

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Executive summary

The first study of its kind to do so, this first edition of the dunnhumby Grocery Retailer Preference Index (RPI) seeks to draw a direct line between Customer sentiment and business performance amongst Singapore Grocery Retailers.

Tracking the performance of 21 Retailers, the RPI looks at the factors which shoppers in Singapore say play the greatest role in helping them choose one banner over another. Correlating those factors with data pertaining to each banner's Share of Wallet and Emotional Connection with Customers, the RPI provides a definitive look at the nation's grocery industry from a Customer-first perspective.



Headline findings:

- The highest ranked Retailer in this study is FairPrice Supermarket. Market-leading Share of Wallet and Emotional Connection scores are driven by good results across several of the factors that influence shopper preference.
- FairPrice banners (Supermarket, Xtra, and Finest) dominate the RPI rankings, occupying three of the top five positions.
- There is a clear link between the ability to meet Customer demands and business performance. Those Retailers that consistently deliver on Customer needs tend to be rewarded with a higher RPI ranking.
- Seven "preference pillars" influence where Customers choose to shop. Chief amongst these are Ease of Shopping and Price & Variety.
- Experiences with online grocery do not necessarily influence physical shopper preference. In contrast, though, Customers are much more likely to shop online with Retailers they have experience of in person.



Key learnings:

- While preference in Singapore is skewed heavily towards the FairPrice banners, Customers in this market are frequent cross-shoppers – visiting an average of nine different banners on a monthly basis. This, combined with the fact that preference is driven by a multitude of different factors, means that Retailers outside of FairPrice banners have a clear opportunity to win loyalty and spend by differentiating in key areas. To do this, they need to focus clearly on the Customer needs they serve, and what shoppers really want from them.
- In each preference pillar (i.e. Convenience), we measure both the expectations that Customers have for the banners they shop, and how well those Retailers actually perform. Some banners are so successful in certain areas that shoppers have come to treat their market-leading performance as an integral part of the Retailer's value proposition – and this has a demonstrable impact on expectations. Where performance is exceptionally high, expectations tend to be similarly low; essentially, when shoppers see true excellence in play they treat it as part of a Retailer's "basic" offering.
- The quality of a Retailer's online offering has little impact on where respondents choose to shop offline. At the same time, Customers who have experience of shopping with a banner in person are much more likely to frequent that Retailer digitally, too. Omnichannel Grocery Retailers looking to grow their online offering have a ready-made audience in the form of their in-store Customers.

Introduction

Since 2018, dunnhumby has published a number of studies as part of an ongoing series known as the Retailer Preference Index (RPI). Initially designed to explore Customer preference in North America, the RPI programme of today is supported by studies covering locations ranging from Australia, Thailand, and South Korea through to France, Portugal, Germany and more.

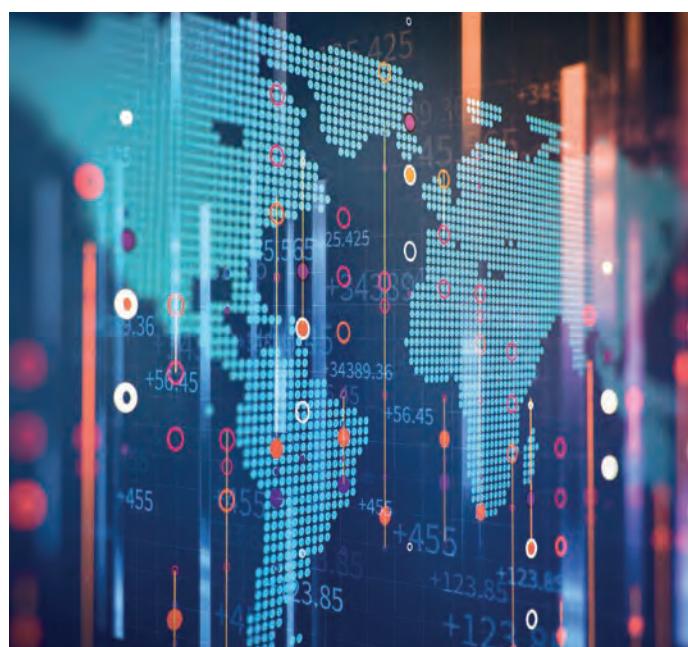
While the results of these studies vary considerably between countries and geographical territories, a few key elements help to ensure consistency across the whole. Each RPI explores four issues specifically: the factors that drive Customers to choose one Retailer over another; each Retailer's performance against those factors; the extent to which Retailers have built an emotional bond with shoppers; and each Retailer's share of wallet in their market.

This study, which incorporates the views of more than 3,000 shoppers, is the first to be conducted for the Singapore market. In it, we establish a number of "preference pillars" – overarching themes that help shoppers determine which banners to frequent. As might be expected, and as we will demonstrate, those banners that best meet shopper expectations are usually rewarded with a higher share of shopper spend and a stronger emotional bond.

While our RPI studies to date have focused on Customer preference as a whole, the strength of the online grocery market in Singapore is such that, for the first time, we conducted supplementary analysis relating specifically to the factors that drive ecommerce preference. By doing so, we found a crucial relationship between bricks-and-mortar presence and online preference, something explored in detail later in this paper.

Finally, presented with the opportunity to survey thousands of shoppers as part of this study, we also used the opportunity to gain an understanding of the ways in which Covid-19 might have shaped their shopping behaviours. Not only does this give us some context for the overall RPI results, it provides a useful snapshot of the specific habits of the island's shoppers in relation to the ongoing pandemic.

Over the next few pages, you'll learn more about the nature of preference in the Singapore grocery market, and what Customers are looking for from the banners they frequent.



The Singapore Retailer Preference Index methodology

Summarising the views of 3,089 respondents, the inaugural Singapore RPI ranks 21 of the state's Retailers and evaluates their ability to deliver on Customer demands. Respondents participated in a series of online interviews conducted between 8th and 19th January 2021.

As with all of dunnhumby's RPI studies, a Retailer's ranking is based on the combination of two things:

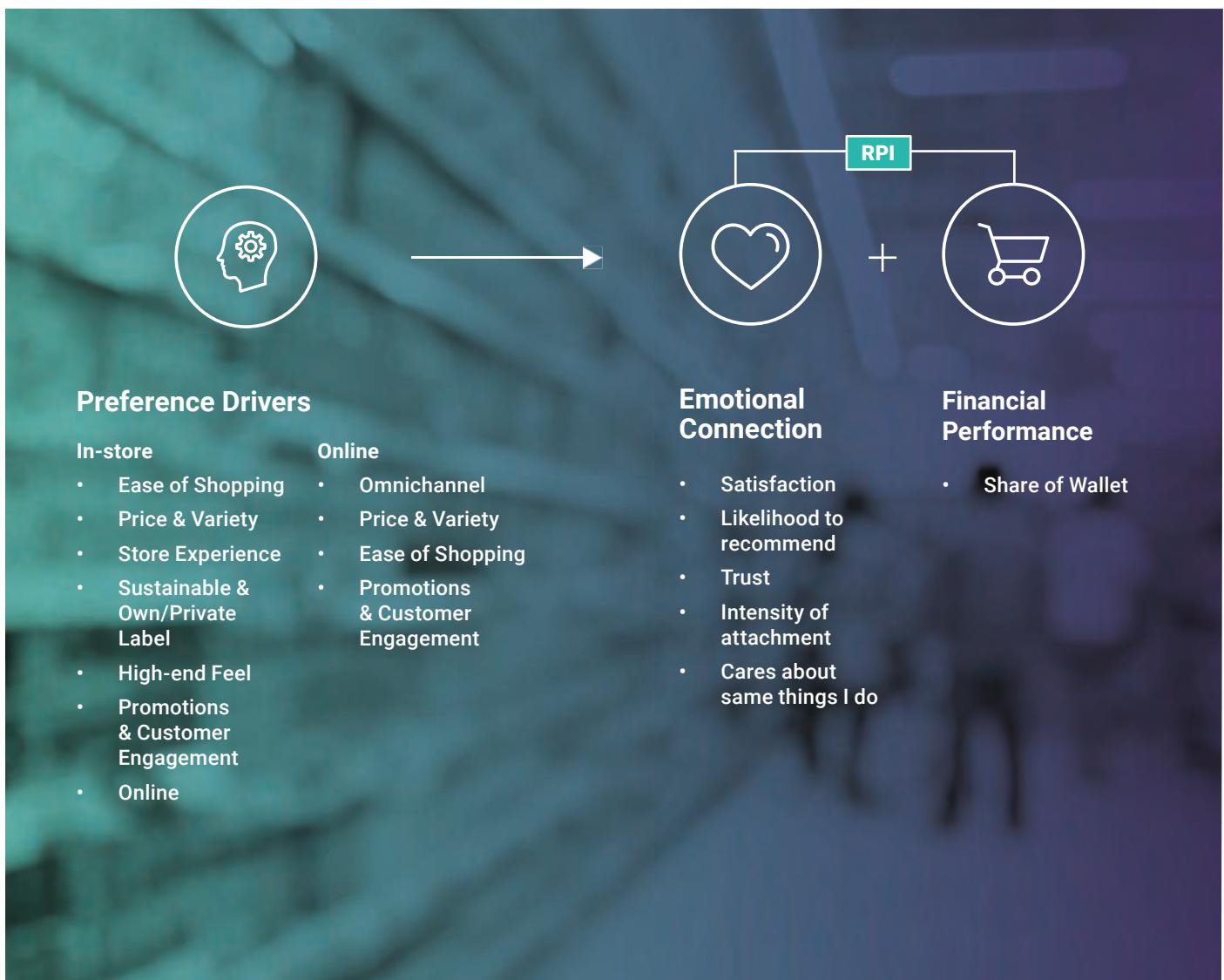


Share of Wallet: where Customers claim to spend their grocery budgets.



Emotional Connection: Customers' feelings towards a banner, and the extent to which they relate to or connect with it.

Combined, these factors produce an RPI score. This is used to rank Retailers against each other, a process which forms the core of the study.



As well as ranking each Retailer in this way, we also explore a range of factors relating to Customer preference. By doing so, we seek to understand:

- Why shoppers in Singapore choose one banner over another.
- Whether any issues deter shoppers from using a specific banner, and what they may be.
- Which Retailers perform best when it comes to meeting shopper demand.
- The extent to which preference influences Share of Wallet and Emotional Connection.

To understand more about these issues, we ask respondents to provide us with insights on a number of issues relating to their everyday shopping experiences. These range from factors of convenience like store navigation and speed of checkout, through to considerations like own/private label, organic produce, price, cleanliness, and many more.

We refer to each of these issues as "preference drivers". Where several of these drivers group around a specific theme, they form an overarching "preference pillar". In this study, for instance, the Ease of Shopping pillar is composed of three preference drivers: convenient locations, a pleasant in-store environment, and the ease with which shoppers can get in and out of a store.

These umbrella categories help to provide a focused analysis of the most important issues to shoppers in Singapore, as well as offering a clear indication of the extent to which preference influences overall business performance.

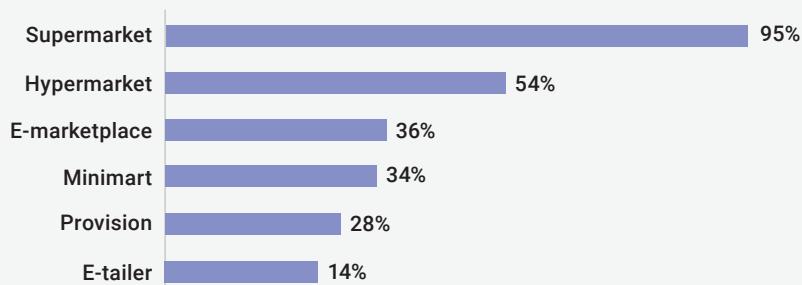
How Singapore shops: an overview of Customer behaviours

In addition to the array of questions that we asked respondents in regard to Retailer preference, we also sought to gain an understanding of their shopping behaviours more generally. Asking them to focus specifically on the four-week period before they were surveyed, we uncovered the following about their grocery Retail habits.

Shoppers frequent a number of different formats on a monthly basis

While almost everyone (95%) said that they had visited a supermarket in the four weeks leading up to the study, the dominance of that format doesn't prevent others from seeing significant usage too. Hypermarkets (54%), e-marketplaces (36%), minimarts (34%), and provision stores (28%) are frequently shopped at too¹. Online versions of these formats were also included in this analysis.

Types of Stores Shopped Past Month*

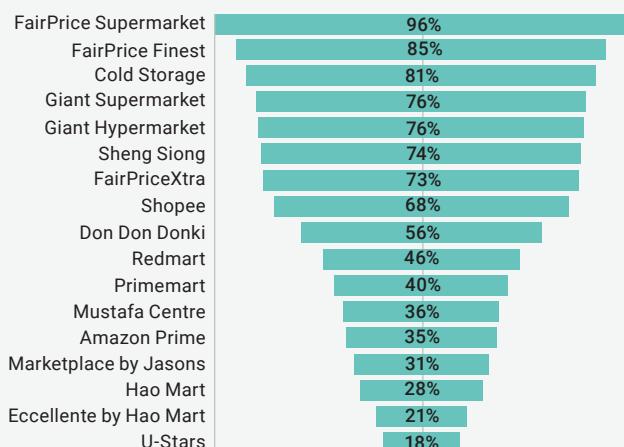


People who shopped only at Minimarts or Provision stores were not included in this study.

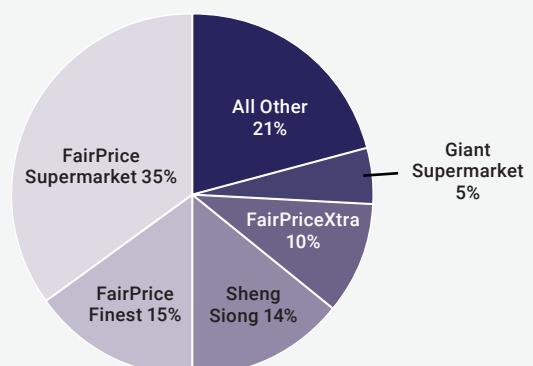
NTUC FairPrice and Dairy Farm Group banners dominate the market

Asked which banners they had shopped in the past month, respondents were quick to call out two of the three FairPrice banners included in this study. FairPrice Supermarket (96%) and FairPrice Xtra (85%), both part of the National Trades Union Congress (NTUC) co-operative, placed first and second respectively. Positions three to five in that list are occupied by Cold Storage (81%), Giant Supermarket (76%), and Giant Hypermarket (also 76%), all part of Hong Kong's Dairy Farm International.

Stores shopped past month



Store shopped most often



	Shop Most Often
Any FairPrice	60%
Any Giant	8%
All Other	32%

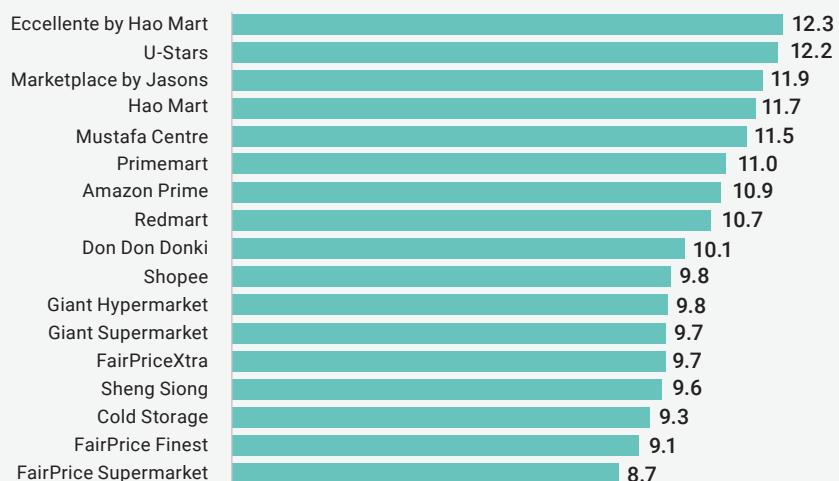
1. NB: Customers who only shop Minimarts or Provision stores are not included in this study.

The sheer volume of the FairPrice banners undoubtedly plays a key role here; across Singapore, the co-op operates 111 FairPrice Supermarkets, 28 FairPrice Finest branches, and nine FairPrice Xtra hypermarkets. This wide footprint ensures that every part of the island is well served.

While there are clear market leaders, Customers shop multiple banners

Despite the clear popularity of the FairPrice and Dairy Farm banners, shoppers in Singapore aren't limited in their Retail outlook. Customers here shop an average of nine different banners on a monthly basis. Even those who shop primarily at FairPrice Supermarket supplement those visits with trips to around eight or nine additional chains each month.

of other stores shopped monthly by Customers of...

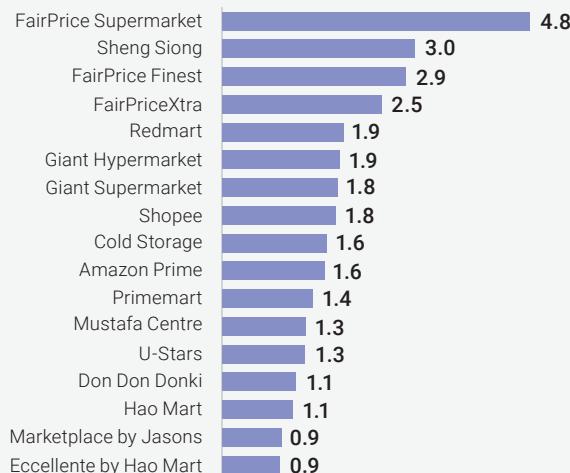


**See Appendix for details on cross-shopping*

Loyalty is heavily skewed towards FairPrice²

dunnhumby's Loyalty Index uses a score to represent the average share of wallet at a given store as compared with shoppers randomly spending their money. The higher that score is above 1.0, the more loyal Customers are believed to be. Singapore's overall Loyalty Score stands 1.9 – just below the global average of 2.0 – and would be lower still were it not for the pull demonstrated by the FairPrice banners. The FairPrice banners have a loyalty score of 6.3, compared to an average for all other stores of just 1.4.

Loyalty Index by Store



	Loyalty Index*
Singapore	1.9
All other countries (excluding Singapore)	2.0
Any FairPrice	6.3
All Other Avg.	1.4

* Loyalty index is the average share of wallet at a given store compared to people randomly spending their money.

The closer to 1, the less loyalty in the market or for the store.

2. NB: data here is in relation to all shopping, not just grocery.

Omnichannel is the preferred offering for the vast majority

Ecommerce in Singapore enjoys significant uptake. Four in five of respondents (81%) had made a digital purchase in the month preceding the study, with delivery (78%) being the preferred option over collection (27%). Fewer than a fifth (19%) limit themselves exclusively to in-store shopping, while a very small group (1%) say that all of their shopping is done online.

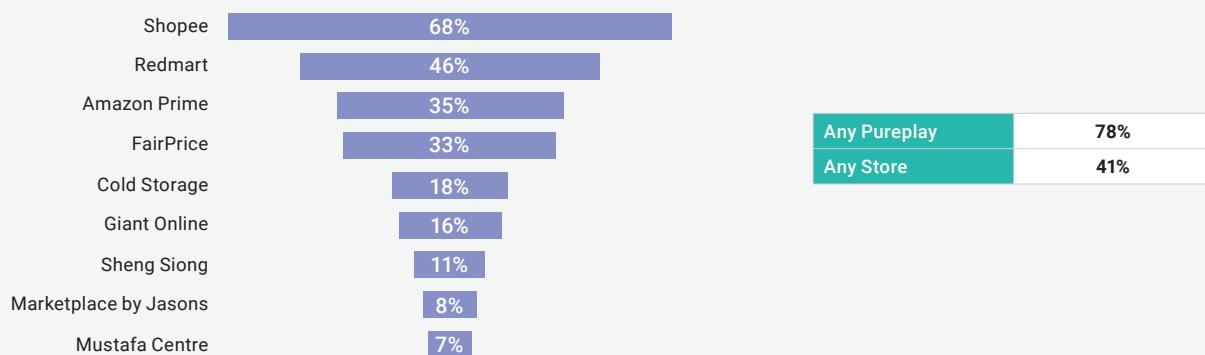
Shop in any store	99%
Omnichannel	81%
In-store only	19%

Any digital shopping	81%
Click and collect	27%
Delivery	78%
Digital only	1%

Pureplay Retailers dominate the online space

Amongst those who have bought online recently, pureplay (digital-only) Retailers tend to be their banners of choice. Shopee (68%) leads the way, with Redmart (46%) and Amazon (35%) following in its wake. Of the omnichannel Retailers, FairPrice (33%) boasts the largest penetration online. Around three-quarters (78%) of Customers say that they made at least one purchase from a pureplay online Retailer in the weeks preceding the study.

Online Shopping Past Month



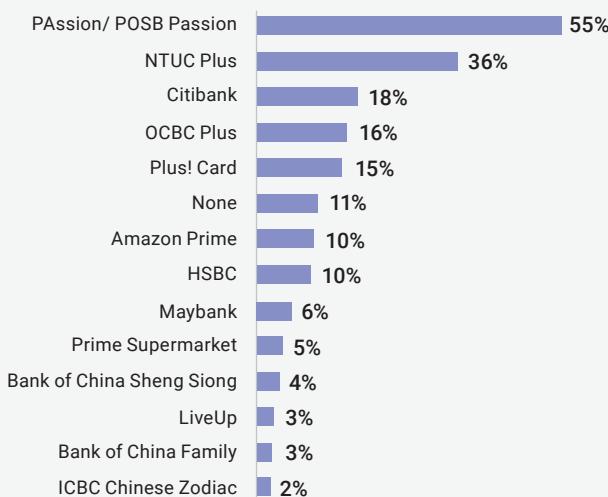
Pureplay Retailers also dominate the home delivery space, with Shopee (62%), Redmart (41%), and Amazon (31%) responsible for the vast majority of online deliveries.

The PAssion card is in use by more than half of shoppers

A key part of Singapore's People's Association, the PAAssion Card – which offers member discounts and specialist rates at a number of Retailers, in addition to other benefits – is in heavy circulation amongst shoppers. Over half (55%) own either a standard PAAssion Card or a POSB debit card equivalent. Accordingly, the PAAssion Card enjoys the highest penetration at the majority of grocery stores, followed by NTUC's Plus! Card and Citibank's Citi Rewards card.

The PAAssion card is so widely held that even people who shop at one of the FairPrice banners most often are more likely to hold a PAAssion card than an NTUC Plus card. In fact, the PAAssion card is the most widely held card by the usual shoppers of all banners except Amazon Prime and Hao Mart.

Loyalty Cards Used



Loyalty card used by those who shop store most often*

	Highest penetration	2nd highest penetration	3rd highest penetration
Amazon Prime	Amazon Prime	Citibank	HSBC
Cold Storage	PAssion Card	NTUC Plus	Citibank
FairPrice Finest	PAssion Card	NTUC Plus	Citibank
FairPrice Supermarket	PAssion Card	NTUC Plus	OCBC Plus
FairPriceXtra	PAssion Card	NTUC Plus	Plus! Card
Giant Hypermarket	PAssion Card	NTUC Plus	Citibank
Giant Supermarket	PAssion Card	NTUC Plus	Citibank
Hao Mart	Amazon Prime	HSBC	PAssion Card
Mustafa Centre	PAssion Card	Amazon Prime	HSBC
Redmart	PAssion Card	Citibank	NTUC Plus
Sheng Siong	PAssion Card	NTUC Plus	Citibank
Shopee	PAssion Card	NTUC Plus	Citibank

*Stores with too few people claiming they shopped there most often are omitted from this chart.

Friends and family have an overt impact on preference

One of the key questions we use to determine how emotionally connected shoppers are to a banner is to ask them how happy they'd be to recommend it to friends and family. In Singapore, those recommendations count for a lot; more than half (51%) say that word of mouth from their loved ones and relatives helps to influence their Retail preferences.

The significant impact that personal recommendations have on preference makes it all the more important that Retailers effectively meet Customer expectations. A good – or bad – word from a friend or relative goes a long way in Singapore, and banners can expect a single Customer to amplify their likes and dislikes to a much wider and very attentive group.

Advocacy becomes hugely important as a result; if word of mouth is more effective than some traditional forms of advertising, Retail marketers need to understand how to turn Customers into evangelists for their brand. In many cases, this will go beyond pure marketing, and require a cohesive, Customer-first strategy that encompasses the entire business.

Which of the channels do shoppers in Singapore use regularly to help them make in-store grocery shopping decisions?

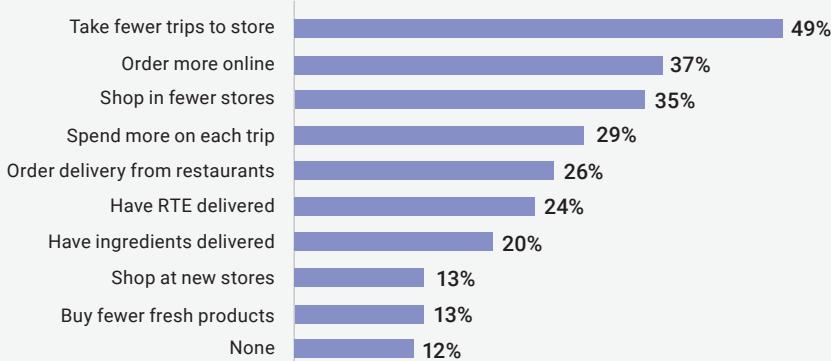


Worries about Covid are broadly in line with the rest of the world

Another measure employed by dunnhumby in our global research is the Covid-19 Worry Index. The Worry Index explores how concerned people are about their own wellbeing as a result of the virus, that of their friends and family, and whether they feel safe shopping in-store. Singapore's Worry Index score sits at 23%, just below the global average of 24%.

Amongst the most common responses to Covid-related fears have been a reduction in the number of trips made to stores (49%), an increase in online ordering (37%), and the decision to shop in fewer stores (35%).

How Shoppers in Singapore have adapted their shopping behaviour due to Covid-19



Type of Store	Worry Index*
Pureplay	26%
Other	23%

* The Worry Index is a combination of three questions: 1) I am very worried about the virus; 2) I am concerned that I, someone in my family, may contract the virus; 3) I don't feel safe from infection while shopping in the store



Analysing Retailer preference in Singapore: drivers and pillars

Seven key “pillars” influence where Customers choose to shop in Singapore. While these pillars are closely grouped in terms of the contribution they make to shopper behaviours, two in particular have the strongest overall impact: Ease of Shopping, and Price & Variety. Online, contrastingly, has a much weaker effect on choice.

As explained above, each of the seven preference pillars is made up of a number of preference drivers. The relationship between these drivers and the pillars are not pre-defined, but instead are created based on local preferences. Where shoppers tell us that store cleanliness and speed of checkout are important, for instance, we are able to build a “Store Experience” pillar around those themes.

All of the pillars in this study are ranked in terms of their importance to shoppers in Singapore. What this means in practice is that Retailers who perform well against the pillars at the top of the rankings tend to be rewarded with a higher RPI score (stronger Emotional Connection and a greater Share of Wallet).

Naturally, this provides a useful framework for Retailers to explore when evaluating how best to improve the relevance of their offering to Customers.

The 2021 Singapore RPI Preference Pillars

Pillar Ranking	RPI Pillar	Preference Drivers that Create the Pillar
1	Ease of Shopping	<ul style="list-style-type: none">1. Convenient locations2. Pleasant store environment3. Easy to get in and out quickly
2	Price & Variety	<ul style="list-style-type: none">1. Low prices even when not using offers or special deals2. The right variety of products to meet shopper needs3. Customers can do all of their shopping in a single store4. Does not run out of items that shoppers buy regularly
3	Store Experience	<ul style="list-style-type: none">1. The store is clean and well maintained2. Check out is fast and easy
4	Sustainable & Own/ Private Label	<ul style="list-style-type: none">1. Good prices on natural and organic products2. A wide variety of natural and organic products3. A wide variety of own/private label products4. Good prices on own/private label products
5	High-end Feel	<ul style="list-style-type: none">1. Look and feel of the store is upscale/high-end2. Friendly, helpful, and available staff3. The highest quality products4. A variety of products from local farmers and businesses
6	Promotions & Customer Engagement	<ul style="list-style-type: none">1. Has discounts/coupons on items shoppers buy regularly2. Sends them relevant and personalised offers3. Rewards Customers for shopping with them
7	Online	<ul style="list-style-type: none">1. Customers can do all of their shopping at one online store2. Online checkout is fast and easy3. Regularly purchased items are in stock4. The freshest meat, fruits and vegetables5. The right variety of products to meet Customer needs6. Orders are delivered when promised7. Low prices even when not using offers or special deals8. Easy to shop online

2021 Singapore RPI: overall results



Overall Performance

Winner:

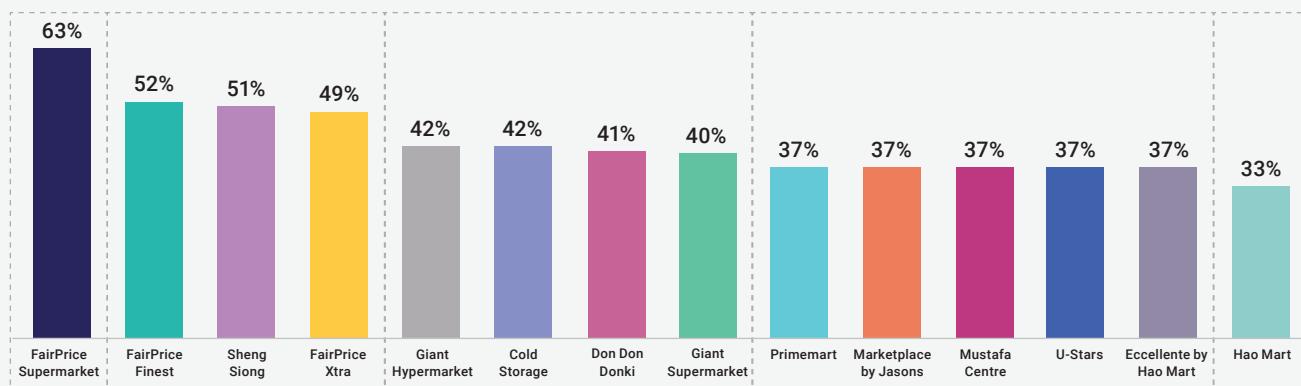
FairPrice Supermarket



The highest-ranked Retailer in terms of both Share of Wallet and Emotional Connection, FairPrice Supermarket takes overall top spot in the first Singapore RPI.

With a Share of Wallet pushing well past 50%, and an Emotional Connection that only FairPrice Xtra and Sheng Siong come close to matching, FairPrice Supermarket is the clear overall winner. Leading performance in these two areas is supported by a strong showing across the seven preference pillars, with FairPrice Supermarket rarely featuring outside of the top half of each pillar's rankings. More detail on specific performance within each pillar is presented below.

Total RPI score (in-store)



FairPrice Supermarket also enjoys a significantly higher loyalty score than competing banners. FairPrice Supermarket sits at 4.1 on this index, compared to an average of just 1.9 for all Singapore Retailers and a global average of 2.0.

Retailer profile: FairPrice Supermarket

Founded by Singapore's labour movement in 1973, the NTUC FairPrice Co-operative was established with the overall objective of moderating the cost of living in the country. FairPrice Supermarket is one of a number of formats under the NTUC umbrella, alongside Shop, Xtra, Finest, Xpress, Unity Pharmacy³, and more.

The NTUC accounted for a gigantic 40% of total grocery market share in 2020⁴, and the 111 FairPrice Supermarkets in operation across the island delivered a vast amount of the group's SGD4bn+ revenues in 2020 – around 4.5x that of its other formats, according to analyst firm IGD⁵.

Like other banners in the group, FairPrice Supermarket offers a significant number of products across its "HouseBrand" private label. Gold (premium), SmartChoice (affordable), Pasar (fresh), and Pasar Organic lines aim to retail between 10 and 15% lower than competing brands⁶.

FairPrice Supermarket is a strong performer across multiple preference pillars. Placing top in the Promotions & Customer Engagement category, it also scores well in Ease of Shopping and Sustainable & Own/Private Label. Results against Price & Variety, Store Experience, and High-end Feel may be middling, but FairPrice Supermarket's overwhelming grip on shoppers in Singapore wallets – and hearts – ensures that it ranks first in our inaugural RPI for the market.

3. <https://www.fairprice.com.sg/wps/portal/corporate/corpHome>

4. Insight on Singapore: What you need to know 2020 – 2022 – IGD Retail Analysis

5. Insight on Singapore: What you need to know 2020 – 2022 – IGD Retail Analysis

6. <https://www.fairprice.com.sg/wps/portal/fp/housebrands>



Share of Wallet

Winner:
FairPrice Supermarket

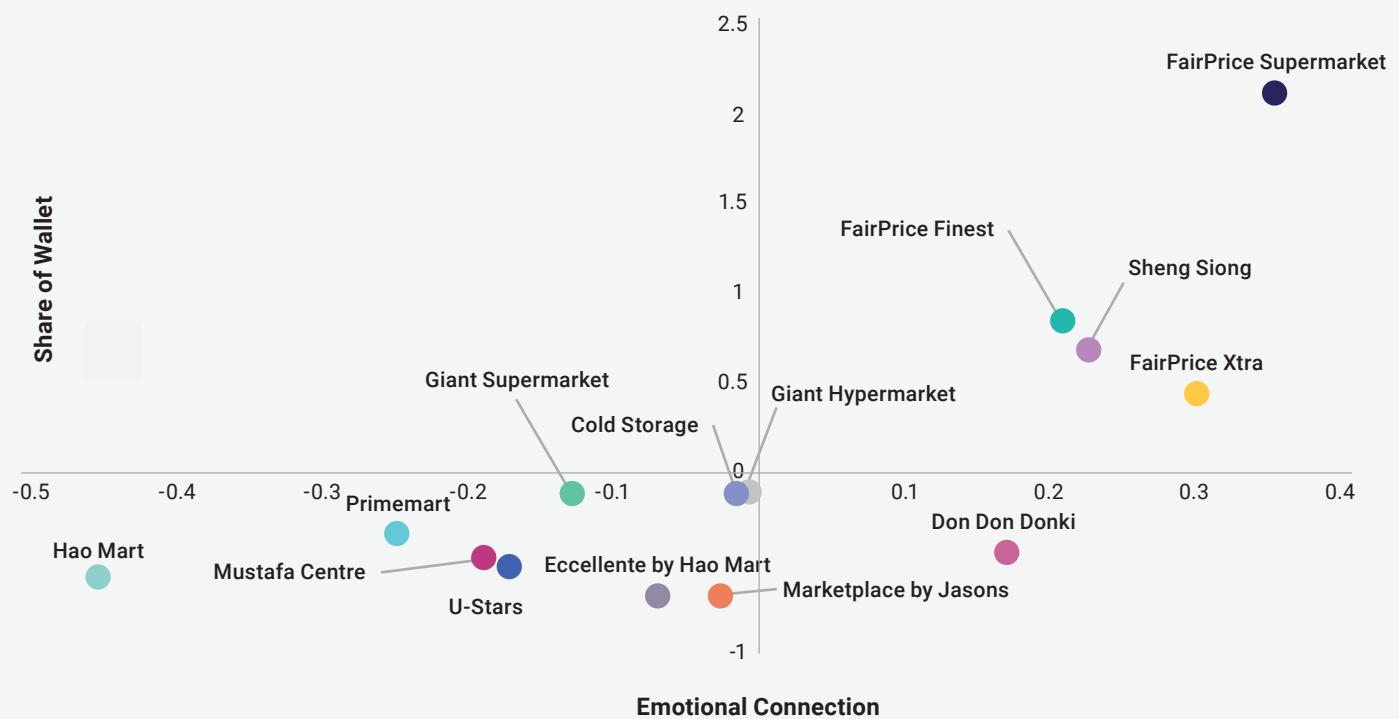


Second place:
FairPrice Finest



FairPrice banners dominate in the area of Share of Wallet, with three banners (Supermarket, Xtra, and Finest) present in the top five rankings. FairPrice Supermarket leads the pack here, with an average Share of Wallet almost double that of the fourth-placed Retailer, FairPrice Xtra. FairPrice Finest comes closest to matching Supermarket's apparently unassailable lead, with an average Share of Wallet that sits just above 30%.

How is the relation between Share of Wallet and Emotional Connection?





Emotional Connection

Winner:
FairPrice Supermarket



Second place:
FairPrice Xtra

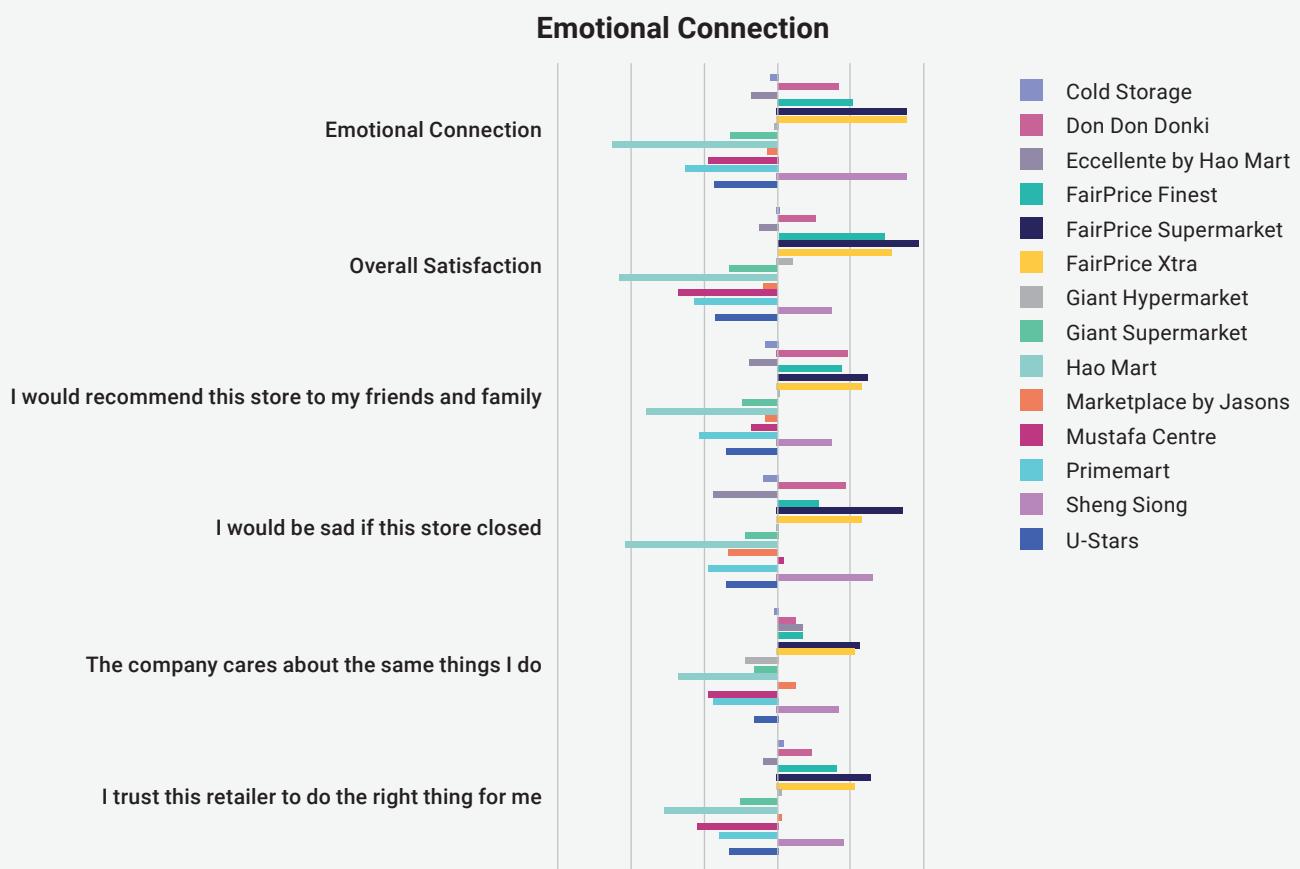


While Emotional Connection may seem like a difficult concept to try and measure, we do so in our RPIs by asking specific questions relating to the sentiment that respondents have towards each banner.

For this study, these questions were:

- Their overall satisfaction with the Retailer in question.
- The extent to which they would recommend the banner to friends and family.
- Whether they would be sad to see the store closed.
- How far they believe that the Retailer cares about the same things that they do.
- The trust they have in the banner to do the right things for them.

Grouped, the responses to these questions provide an indication of the overall Emotional Connection that shoppers have to a banner, allowing us to rank them in terms of that bond.



FairPrice banners dominate once again, here. FairPrice Supermarket, the top performer, scores particularly well in areas such as overall satisfaction, the disappointment respondents would feel if it closed, and their belief that the banner has its Customers' best interests at heart.

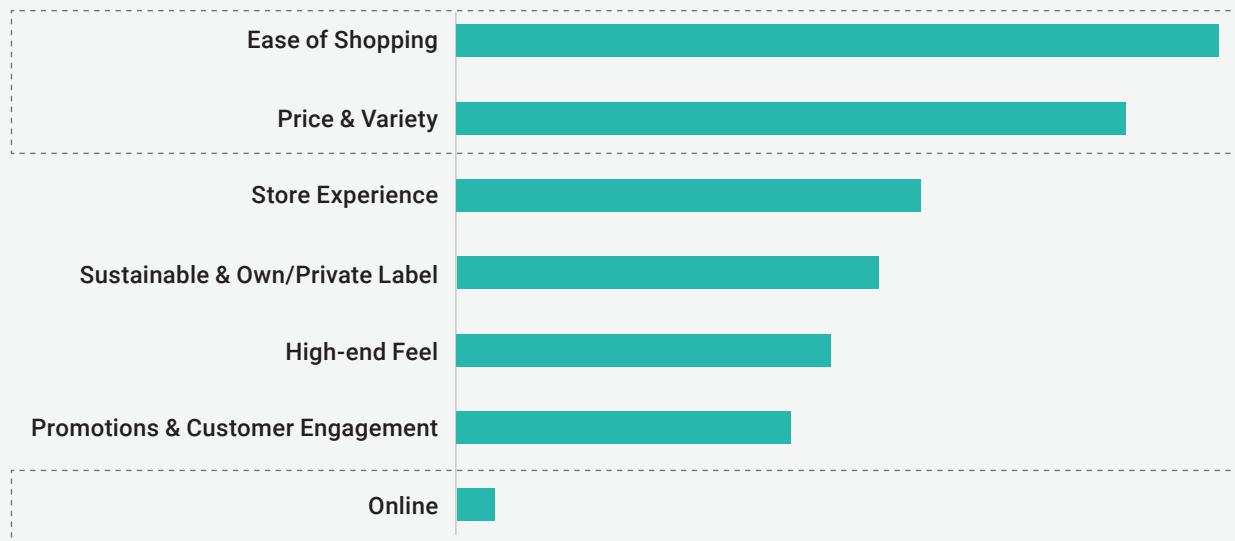
FairPrice Xtra, fifth in the Share of Wallet category, sits second in Emotional Connection. Xtra trails its sister banner by just a small margin in most fields, with only overall satisfaction and shoppers' reaction to the closure of those stores separating the two by any significant degree.

In-store: results by preference pillar

Whenever and wherever we conduct an RPI study, we let responses from the local market lead us. In order to ensure that we don't impose predetermined issues onto a market by asking respondents to choose from a limited selection of issues, we allow them to tell us what truly matters to them.

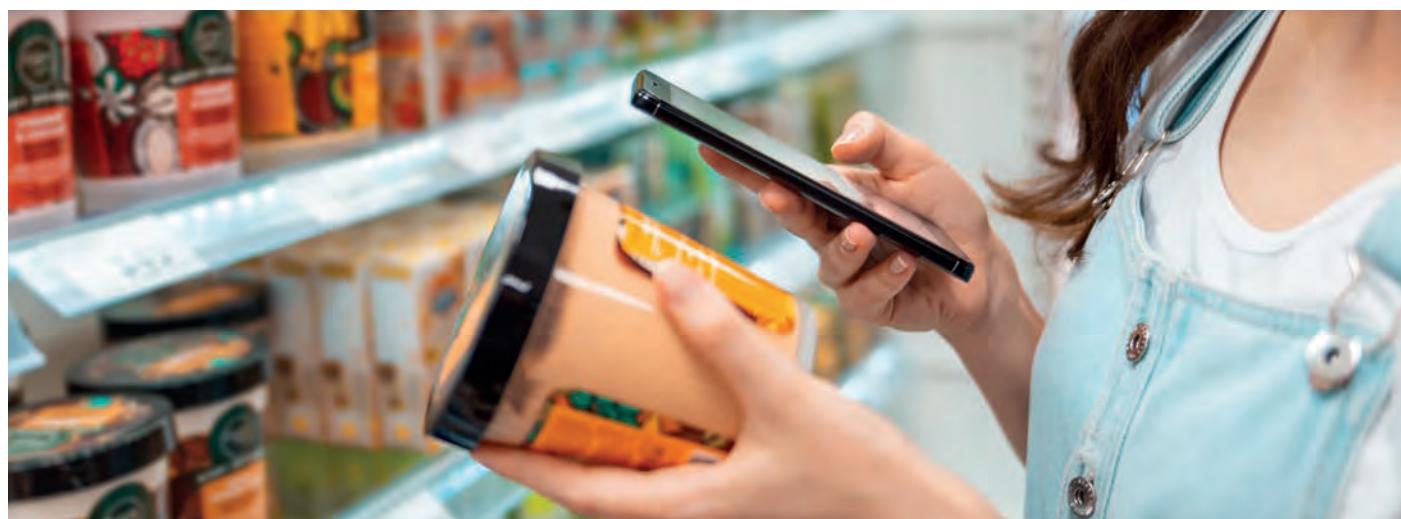
The result of this is that preference pillars can vary considerably between studies. While this study includes seven pillars, for instance, others feature fewer. This is important, not only because it allows local respondents to properly shape each study around their specific needs, but it provides an indication of how many areas Retailers need to deliver across in order to stay competitive.

Overall Pillar Importance



As well as asking shoppers to tell us how important various issues are to them overall, we also ask them to consider how important it is for each banner to deliver on those needs, and whether they actually manage to do so. This gives us three vital metrics: the pillars by order of their contribution to shopper preference, the expectations shoppers have for each banner against those pillars, and a ranking of Retailers within them.

Let's now look at each pillar in depth, highlighting the star performers and what it is they're doing that might be driving their scores higher than competing banners.





Ease of Shopping

Highest ranking Retailer:
FairPrice Xtra

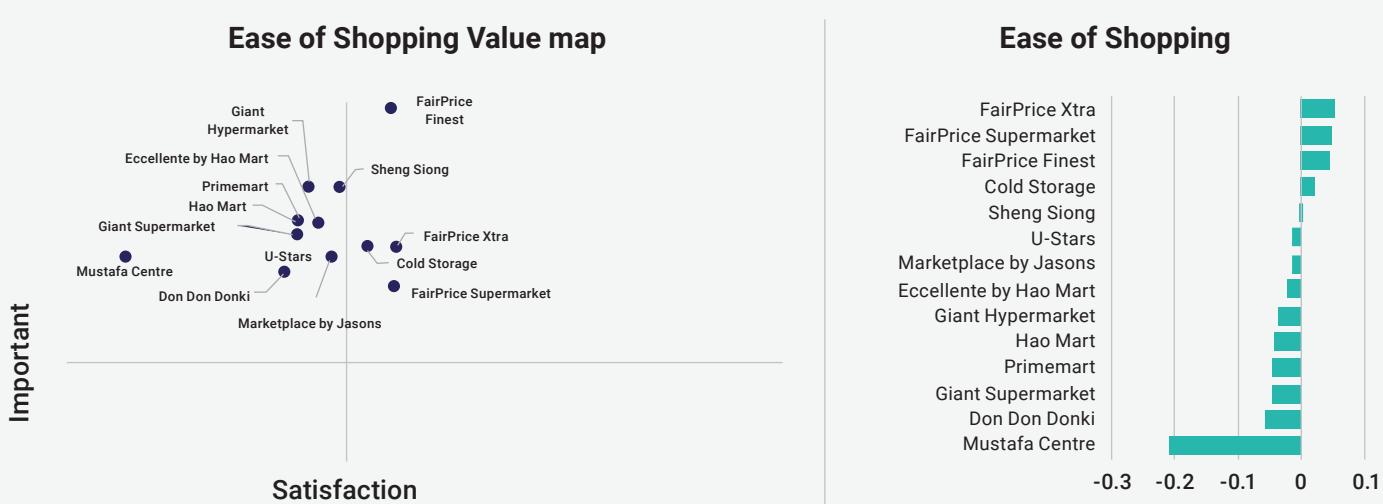


Customers love:

“It’s convenient, because there are stores everywhere.”
“The spaciousness of the layout.”
“Every aisle is labelled properly, so I can find what I need.”

In a field dominated by FairPrice banners, it is hypermarket banner Xtra that leads the way in regard to Ease of Shopping.

Xtra currently serves Customers across nine locations⁷. While this relatively limited footprint would likely prevent Xtra from scoring particularly well under the “convenient locations” driver, the nature of Singapore’s geography instead means that the hypermarket is widely accessible to shoppers across the island. As a result, Xtra trails FairPrice Supermarket – with its much wider footprint – by only a few points in this area.



One area in which respondents are particularly keen to highlight FairPrice Xtra’s performance is that of the in-store environment. The hypermarket banner’s leading score here may be influenced in part by the opening of the largest Xtra to date at VivoCity in 2019. This 90,000ft² store⁸, part of Singapore’s largest shopping mall, includes premium dining and drinking experiences, hydroponic crop farms, and a FairPrice Unity area, specialising in health and beauty lines⁹.

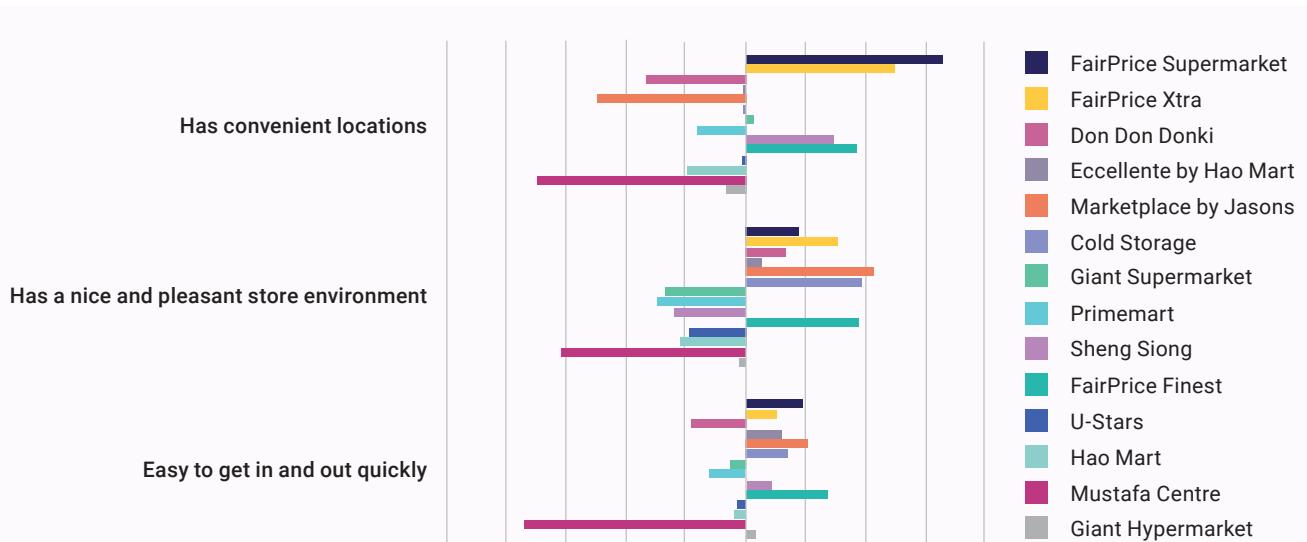
FairPrice Supermarket and FairPrice Finest both push FairPrice Xtra hard in this pillar, with the hypermarket earning the top position by only the slimmest of margins. Outside of the FairPrice offerings, Cold Storage is the nearest competitor in this field.

Sheng Siong, which places fifth in this pillar, scores positively in terms of convenient locations and the ease with which Customers can get in and out. It is prevented from a higher placing only by the perceived quality of the in-store environment.

7. FairPrice: Overview of Formats by Country 2021 - IGD Retail Analysis

8. Largest FairPrice Xtra hypermarket opens at VivoCity – The Straits Times – 6th August 2019

9. NTUC FairPrice touts improved grocery shopping experience with ads for new retail concept – The Drum – 28th August 2019



In terms of its importance to each of the banners covered in this study, respondents say that Ease of Shopping is most relevant to offerings from FairPrice Finest, Giant Hypermarket, and Sheng Siong.

Strengths, weaknesses and opportunities

How can some of Singapore's leading Retailers improve their performance under Ease of Shopping, and where do they already excel?

Banner	Strongest attribute	Biggest opportunity to improve
FairPrice Xtra	Convenient locations	Pleasant store environment
FairPrice Supermarket	Convenient locations	Easy to get in and out quickly
FairPrice Finest	Pleasant store environment	Easy to get in and out quickly
Cold Storage	Pleasant store environment	Convenient locations
Giant Supermarket	Convenient locations	Pleasant store environment
Giant Hypermarket	Easy to get in and out quickly	Convenient locations
Sheng Siong	Convenient locations	Pleasant store environment

Retailer profile: Cold Storage

One of Singapore's oldest and best-known Retailers, the Singapore Cold Storage Company was founded in 1903. Starting life as a distributor of frozen beef, mutton, lamb, and other goods from Australia, the company has grown to become a powerhouse of Singapore's grocery market during the past century, introducing the first supermarket to the country in 1960¹⁰.

Today part of the Dairy Farm Group – a pan-Asian food and drugstore Retailer – Cold Storage operates in Singapore alongside sister brands Marketplace by Jasons and Giant. Together, these banners held around 15% of total market share and generated revenues in the region of SGD1.5bn in 2020¹¹. Cold Storage stores can be found at 40 locations in Singapore at the time of this report¹².

Cold Storage places sixth in this first RPI, a position that it shares with Giant Hypermarket. Despite a solid Share of Wallet score, the banner struggles from the point of view of Emotional Connection – particularly in comparison to the FairPrice banners.

The overall message from shoppers in Singapore is that, while they love the quality of the store experience at Cold Storage, they're less convinced by other, arguably more influential elements of the Retailer's offering.

10. <https://coldstorage.com.sg/our-story#1959>

11. Insight on Singapore: What you need to know 2020 – 2022 – IGD Retail Analysis

12. <https://coldstorage.com.sg/store-locator>



Price & Variety

Highest ranking Retailer:
Mustafa Centre



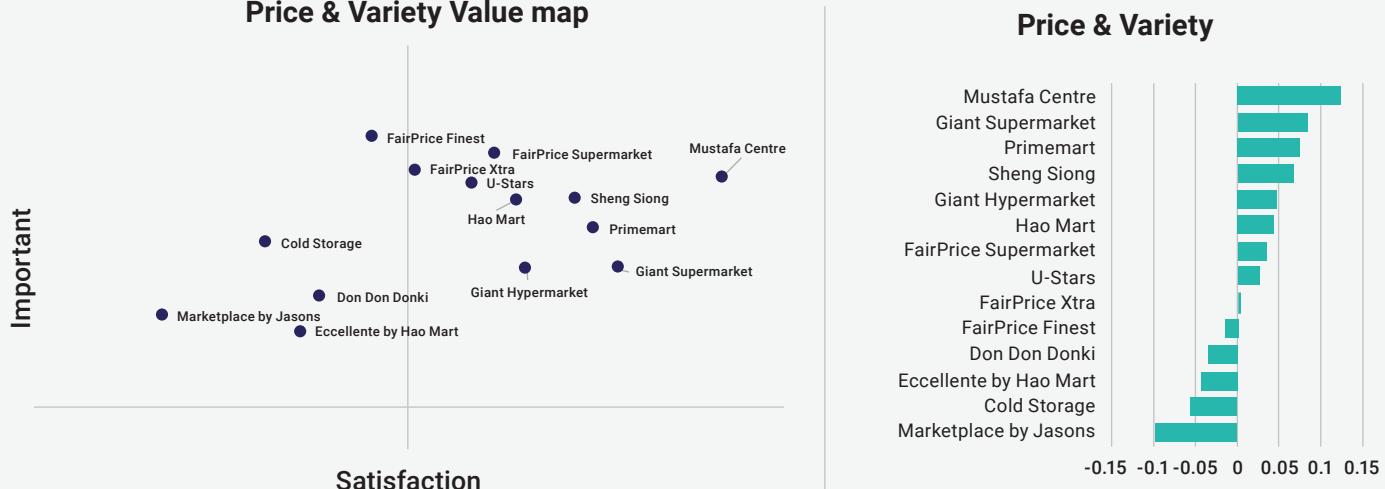
Customers love:

“The variety of products – so many cultures in one place.”

“You can get everything under one roof.”

“Cheaper prices and good products.”

Pricing is a common theme in many of our RPI studies, as is Assortment; the two appear frequently amongst the three most influential factors driving Retailer preference. Typically, they appear either as singular issues or – occasionally – in tandem with another factor (Pricing & Promotions, for instance). In Singapore, however, Price & Variety are fundamentally linked.



The themes that define this pillar cover a broad spectrum of needs. Shoppers are looking to Retailers to provide a wide variety of products, enable them to do all of their shopping in one place, ensure that regularly purchased items don't go out of stock, and offer all of this at a great price too. It's a tough set of demands and, as a result, this pillar generates the biggest variation in performance found in our study.

Mustafa Centre is the top performer here, driven by solid results against all four of those preference drivers. Consistency is key; while others perform better against the defining issues of everyday low pricing, and good promotions and offers, Mustafa's overall capability around Price & Variety is enough to see it come out on top.



Mustafa Centre, of course, is not a traditional grocery Retailer. Situated on the Western edge of Kallang, the six-levelled department store sells a dizzying assortment of goods that range from clothing and electronics, to books, flowers, hardware, and more. An extensive grocery range occupies much of the building's second level, with the bazaar-like setup offering a wide range of fresh and preserved produce. Bulk family packs and discounted goods are some of the Centre's staples.

Amongst the chain stores, Giant Supermarket follows relatively close behind Mustafa. Giant slashed prices on 650 daily essentials by an average of 20% in 2020, at a cost of SGD17m¹³. Announcing the price drop, Chris Bush (Dairy Farm CEO for Southeast Asia Food) noted that it was in response to Customer demand for "cheaper prices... greater value and... more stable prices, particularly on those essential products that they buy most often¹⁴".

Strengths, weaknesses and opportunities

How can some of Singapore's leading Retailers improve their performance under Price & Variety, and where do they already excel?

Banner	Strongest attribute	Biggest opportunity to improve
FairPrice Xtra	Customers can do all of their shopping in a single store	Does not run out of items that shoppers buy regularly
FairPrice Supermarket	Customers can do all of their shopping in a single store	Does not run out of items that shoppers buy regularly
FairPrice Finest	Customers can do all of their shopping in a single store	Low prices even when not using offers or special deals
Cold Storage	Does not run out of items that shoppers buy regularly	Low prices even when not using offers or special deals
Giant Supermarket	Low prices even when not using offers or special deals	Customers can do all of their shopping in a single store
Giant Hypermarket	Low prices even when not using offers or special deals	Does not run out of items that shoppers buy regularly
Sheng Siong	Low prices even when not using offers or special deals	Does not run out of items that shoppers buy regularly

13. Singapore: a refreshed Giant with lower prices – IGD Retail Analysis – 24th September 2020

14. Giant supermarket to lower prices of daily essentials for 6 months by 20% on average – The Straits Times – 24th September 2020

Retailer profile: Sheng Siong

Ranked fourth for Price & Variety, Sheng Siong performs better in the overall RPI than some of the pillar standings might suggest. Though well regarded here and in terms of its Online offering, the banner trails its competitors in areas including Store Experience, High-end Feel, and Promotions & Customer Engagement – but lower scores in these pillars aren't enough to prevent it from taking third place overall. Sheng Siong sits just a fraction below FairPrice Finest in our RPI table.

Established in 1985, Sheng Siong shares a large part of the Singapore market with NTUC FairPrice and Dairy Farm Group. Its 13.5% market share puts it within touching distance of the latter of those brands, and provides a comfortable gap against Alibaba (fourth, with 4.5%)¹⁵.

Unlike its larger competitors with their diverse range of formats, Sheng Siong focuses specifically on just two channels: supermarkets and online. Both of these offerings have a pronounced impact on shoppers, generating some of the highest Emotional Connection scores in the RPI.

There is abundant opportunity here, too; small gains in Share of Wallet would likely see it push past FairPrice Finest (in-store) and FairPrice Online in the rankings. Areas of focus should likely include Store Experience and Sustainable & Own/Private Label – where Customer expectations are high, but performance less so.

15. Insight on Singapore: What you need to know 2020 – 2022 – IGD Retail Analysis

Pillar 3:



Store Experience

Highest ranking Retailer:
Marketplace by Jasons



Customers love:

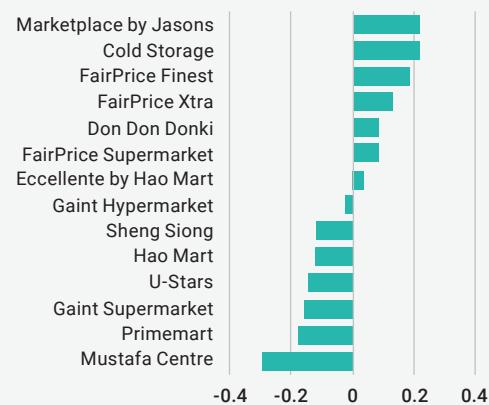
“It's very clean and tidy.”
“The stores are pretty.”
“The efficiency of the staff.”

The quality of the Store Experience offered by grocery Retailers can be defined by a variety of different factors from country to country. In Singapore, shoppers say that it relates to two things specifically: the cleanliness and tidiness of the in-store environment, and the speed and simplicity of checkout.

Store Experience Value map

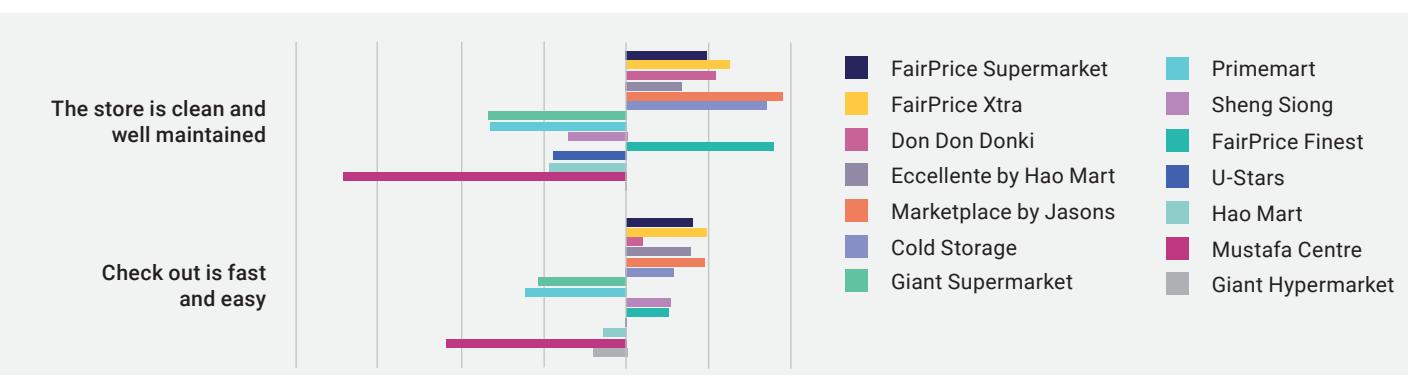


Store Experience



Marketplace by Jasons is the best performing banner in both of those areas, and subsequently the Store Experience pillar as a whole. While Store Experience is only of middling importance for Marketplace by Jasons according to respondents, they are quick to praise its performance nonetheless.

Offering a wide range of goods, and particularly notable for its selection of imported delicacies¹⁶, Marketplace by Jasons stores sit at the higher-end of the grocery Retail scale in Singapore. While prices may be higher than elsewhere, the in-store experience is pitched to match – with respondents to our study frequently calling out the “luxury feel”. Notably, Marketplace by Jasons was also responsible for the launch of Singapore’s first ever self-checkout system¹⁷ in 2003.



Cold Storage is similarly regarded for its Store Experience, something that should come as little surprise when considering that both it and Marketplace by Jasons are Dairy Farm subsidiaries. The Finest and Xtra banners of FairPrice also perform well here.

One of the defining features about the Store Experience pillar is that it includes a very broad spread of performance and expectation. While respondents believe that the quality of the Store Experience is of uniform importance across the market, banner performance is presented as a sliding scale from very poor to excellent. As a result, many Retailers have an opportunity to gain ground here.

Strengths, weaknesses and opportunities

How can some of Singapore’s leading Retailers improve their performance under Store Experience, and where do they already excel?

Banner	Strongest attribute	Biggest opportunity to improve
FairPrice Xtra	The store is clean and well maintained	Check out is fast and easy
FairPrice Supermarket	The store is clean and well maintained	Check out is fast and easy
FairPrice Finest	The store is clean and well maintained	Check out is fast and easy
Cold Storage	The store is clean and well maintained	Check out is fast and easy
Giant Supermarket	Check out is fast and easy	The store is clean and well maintained
Giant Hypermarket	The store is clean and well maintained	Check out is fast and easy
Sheng Siong	Check out is fast and easy	The store is clean and well maintained

Retailer profile: Marketplace by Jasons

A self-described “premium supermarket filled with exquisite ingredients for the adventurous connoisseur”, Marketplace by Jasons specialises in top quality meats, delicatessen goods, and a range of other high-end produce.

With just five stores across the island, Marketplace by Jasons has obviously been designed to meet a very specific need, something that is echoed by its performance in the RPI rankings. It fulfils its core objectives exceptionally well, winning in the Store Experience pillar, and losing only to fellow banner Cold Storage on High-end Feel. And while it might score poorly against Price & Variety, that is entirely in line with its operating model.

Marketplace by Jasons finishes in the fourth quartile of our RPI, an unsurprising placement given its limited footprint. While its Emotional Connection sits close to the market average, a low Share of Wallet ultimately hampers its final ranking.

16. <https://coldstorage.com.sg/our-brands>

17. <https://coldstorage.com.sg/our-story>



Sustainable & Own/Private Label

Highest ranking Retailer:
FairPrice Xtra



Customers love:

“Good variety and own-brand pricing.”
“The fruit and vegetables are very fresh.”
“The variety of house brands.”

Own/private label and sustainable goods have gained traction in many of our global RPIs over the past few years, though rarely as a single item. Sustainability has been cited as a factor in studies for both Thailand and Germany previously, though this had as much to do with sustainable business practices as it did organic produce. Own/private label is frequently cited as a factor that influences preference, but usually as part of a wider pillar relating to Assortment.

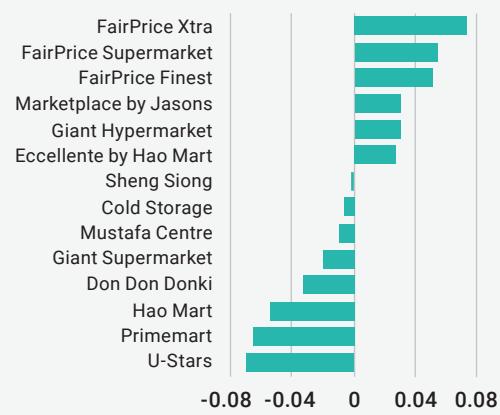
In Singapore, these issues combine to form the Sustainable & Own/Private Label pillar. Good prices and broad assortment of both categories are vital to success in this area.

FairPrice Xtra leads the way in this pillar, driven primarily by its stellar performance on the own-label front; FairPrice Supermarket is the only other banner with comparable scores when it comes to the price and variety of private brand products on offer. Xtra does perform well against the sustainable produce drivers too, however, and only Eccellente by Hao Mart outperforms it on price.

Sustainable & Own/Private Label Value map



Sustainable & Own/Private Label



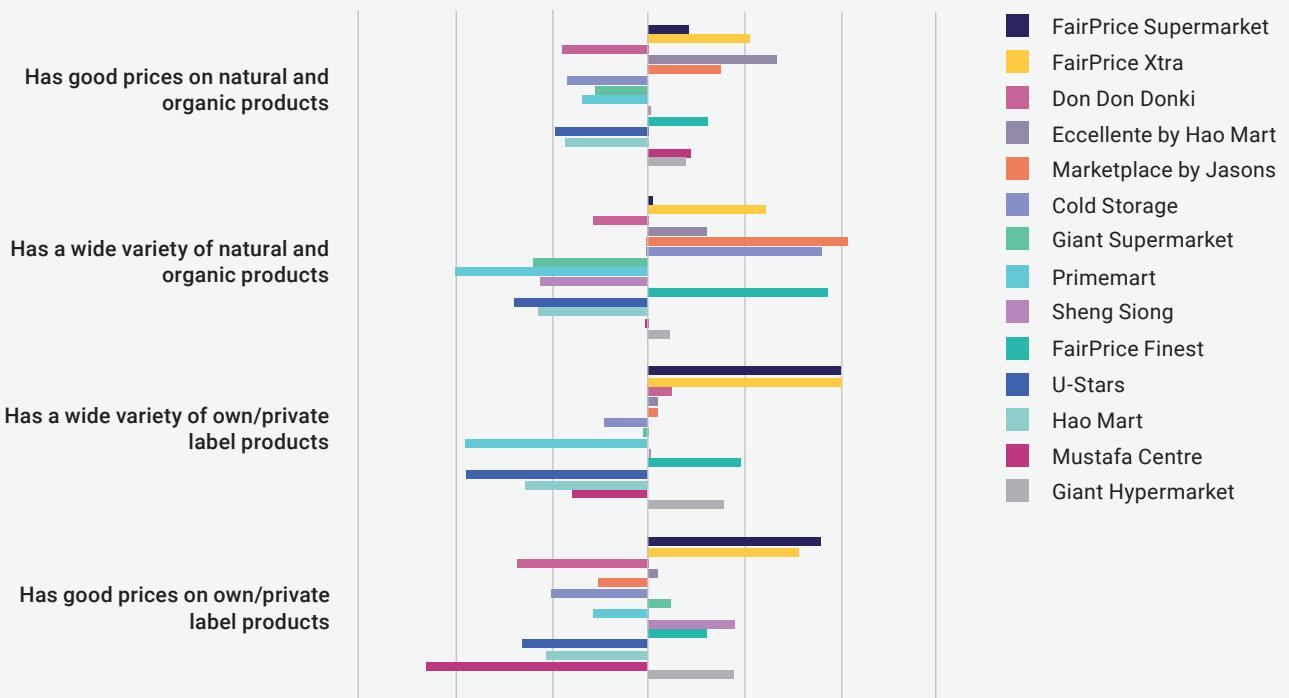
The three FairPrice banners dominate this category, despite the fact that respondents seem to believe that Sustainable & Own/Private Label is a low priority for the group.

FairPrice underwent a notable refresh of its own-brand range as recently as 2019. In October of that year, the group announced plans to redesign 2,000 products from its private label range during 2020, with 300 new items due to be added to meet increased Customer demand¹⁸. FairPrice Finest conducted a similar expansion of its organic lines in 2017, aiming to grow its range by some 25% over a two-year period¹⁹.

18. Singapore: FairPrice reinvigorates private label range – IGD Retail Analysis – 8th October 2019

19. FairPrice Finest to offer more organic and fresh produce given increasing demand from consumers – The Straits Times – 31st August 2017

More recently, a price freeze on 100 daily essentials under the FairPrice HouseBrand label was extended until the end of 2020, a move that was estimated to save shoppers an additional SGD6.7m, on top of the SGD17.8m accrued since the scheme began in March 2019²⁰.



Beneath the FairPrice banners sits a second group of high performers, incorporating Marketplace by Jasons, the aforementioned Eccellente by Hao Mart, and Giant Hypermarket. All three are praised for their range and pricing in this field, though this is only seen to be truly important to Marketplace by Jasons.

As with Store Experience, a number of Retailers could gain via improved performance here.

Strengths, weaknesses and opportunities

How can some of Singapore's leading Retailers improve their performance under Sustainable & Own/Private Label, and where do they already excel?

Banner	Strongest attribute	Biggest opportunity to improve
FairPrice Xtra	A wide variety of own/private label products	Good prices on natural and organic products
FairPrice Supermarket	A wide variety of own/private label products	A wide variety of natural and organic products
FairPrice Finest	A wide variety of natural and organic products	Good prices on natural and organic products / Good prices on own/private label products
Cold Storage	A wide variety of natural and organic products	Good prices on own/private label products
Giant Supermarket	Good prices on natural and organic products	A wide variety of own/private label products
Giant Hypermarket	Good prices on own/private label products	A wide variety of natural and organic products
Sheng Siong	Good prices on own/private label products	A wide variety of natural and organic products

20. NTUC FairPrice to freeze prices of daily essentials and extend seniors' discounts till year-end – The Straits Times – 23rd June 2020



High-end Feel

Highest ranking Retailer:
Cold Storage



Customers love:

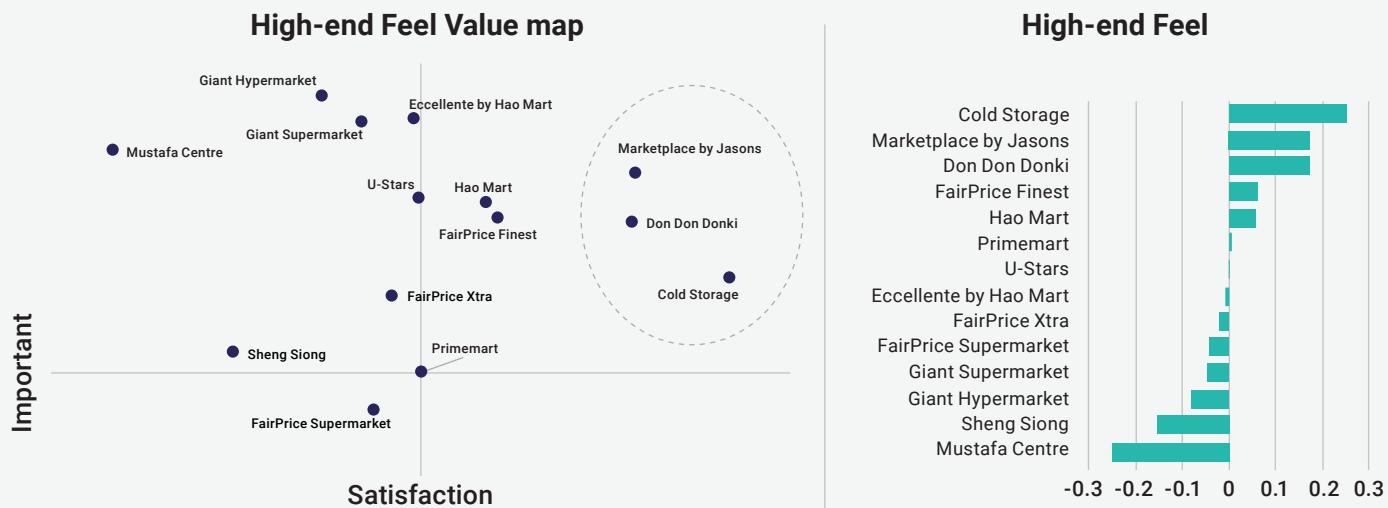
“Stores are well kept, with a nice ambience.”

“The staff are very knowledgeable about what to buy.”

“The high-quality products.”

High-end Feel isn't about just the presentation of stores – though that does form part of the picture. Instead, the fifth most influential pillar is representative of a wider group of issues that combine to help shoppers feel like they're enjoying a premium grocery experience. Helpful, friendly staff, the best quality goods, and a range of farm-fresh local produce all contribute to that sensation.

Having run Marketplace by Jasons close in the Store Experience pillar, Cold Storage takes first place here, with the earlier winner switching down to second. The two Dairy Farm-owned banners are joined by a fellow high performer in the form of Don Don Donki.



Ensuring that staff are readily available to assist Customers seems to be a growing focus for Cold Storage. Having trialled a move to 100% self-service checkouts at its concept store at Fusionopolis – a shift aimed at ensuring that staff spent more time helping shoppers – the chain has begun expanding that concept to other locations across its near 50-strong chain²¹.

21. Cold Storage Singapore makes shopping easy for its customers – betterRetailing – 14th August 2019

Why does a focus on locally-sourced goods influence “High-end Feel”?

One of the preference drivers that contributes to the High-end Feel pillar relates to the “variety of products from local farmers and businesses”. Support for local producers is something that many banners have invested in over recent years, with some orchestrating entire marketing campaigns and refreshed store layouts around local goods.

What is it about these locally-sourced products that leads shoppers to associate them specifically with High-end Feel, rather than Sustainable & Own/Private Label, though?

A few different factors are likely at play here. The first of these relates to the general emotional pull of local produce; shoppers will be aware that by buying locally, they are contributing to the national economy and helping to reduce their impact on the environment. They are, essentially, “doing their bit” by buying local.

The second factor here revolves around quality. Local produce takes less time to go from farms to stores and onto our plates. This means that local produce is fresher, retains more nutrients, and is likely to taste better, too. All of these things will help reinforce that High-end Feel.

Finally, on-the-ground research by our local team suggests that pricing may have at least some influence here. Checking shelves across several categories including dairy and alcohol, locally produced brands were typically found to be more expensive than their international equivalents. While the difference was usually only a dollar or two in each case, local brands are undoubtedly priced as “premium” offerings.

The national “Made with Passion” campaign, which seeks to highlight the cultural and economic significance of locally-produced goods, will only have helped to reinforce the feeling that by buying local, shoppers in Singapore are also buying in to a high-end experience²².

Broadly speaking, this focus on local goods does seem to have penetrated the shopper mindset – to some degree, at least. Asked to what extent they agreed with the idea that the stores in this study carry locally-sourced goods, shoppers gave an entirely average response (4.7 for in-store and 5.2 for online, on a scale from 1 to 7 where 7 represents strong agreement).

Agreement by Attribute
(collapsed across stores)



Agreement by Attribute
(collapsed across stores)



Interestingly, online shoppers tend to perceive a greater variety of local produce than those who shop in store. Digital Customers of Cold Storage, FairPrice Online, Giant Online, and Sheng Siong were all more likely to recognise the availability of locally-sourced goods than their offline counterparts. Omnichannel Retailers also fare better than their pureplay equivalents here.

22. <https://www.visitsingapore.com/madewithpassion/about/>

Online vs In-store



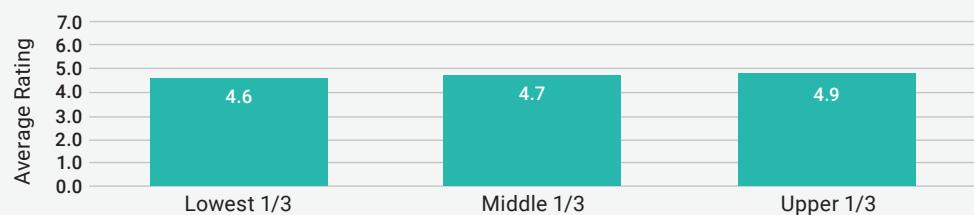
Shopper awareness varies from banner to banner, of course, and while the three FairPrice banners and Sheng Siong all enjoy strong recognition for their local lines, others may yet have work to do. Don Don Donki of course, with its unique focus, is unlikely to be concerned by a low score here.

Availability of Local products (in-store)



From a demographic perspective, income seems to be the only factor that shapes awareness of local goods. Even then, its impact is marginal. Those with higher incomes are slightly more likely to notice the presence of local produce – something that again contributes to the idea that local goods contribute to a banner's High-end Feel.

Income



The impact of local products on store preference

Shoppers in Singapore are broadly aware of locally-sourced goods, but to what extent does it influence where they choose to shop?

Generally, the availability of locally-sourced goods is a factor that is neither a strength nor a weakness. It has a modest impact on both Emotional Connection and Share of Wallet, though tends to have a greater pull on the first of those over the second.

Average correlation across all stores

	Emotional Connection	Share of Wallet
Availability of local products	.50	.11

The importance of this factor varies between banners, too. At stores including Hao Mart, Eccellente by Hao Mart, U-Stars, and Sheng Siong, the influence of local goods on Emotional Connection and Share of Wallet is markedly higher than at the likes of Don Don Donki, Marketplace by Jasons, Giant Supermarket, and FairPrice Finest.

Is more highly correlated to performance at these stores

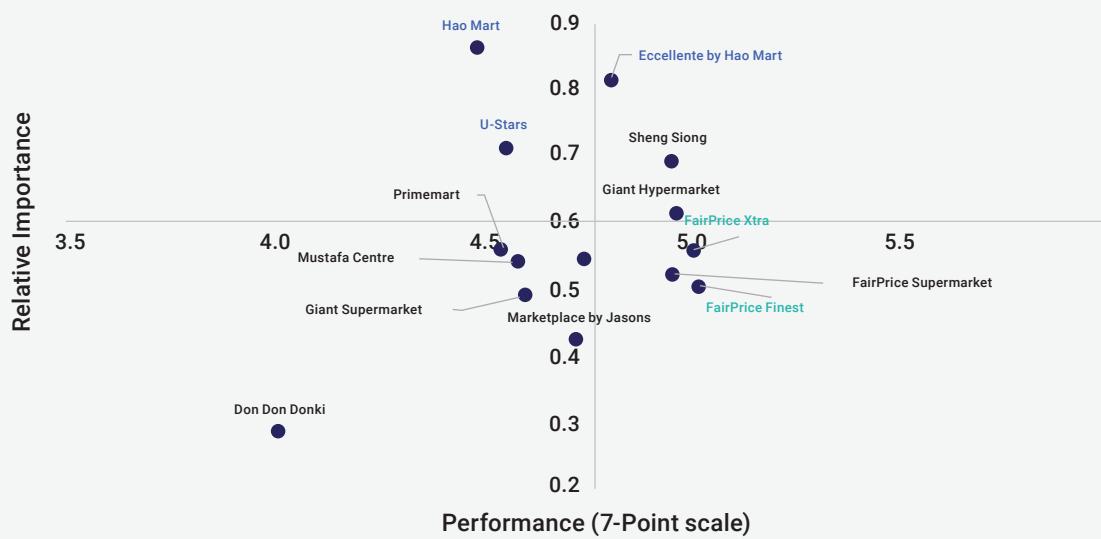
	Emotional Connection	Share of Wallet
Hao Mart	.66	.26
Eccellente by Hao Mart	.68	.13
U-Stars	.60	.11
Sheng Siong	.49	.20

And less correlated at these stores

	Emotional Connection	Share of Wallet
Don Don Donki	.22	.07
Marketplace by Jasons	.35	.07
Giant Supermarket	.49	.00
FairPrice Finest	.44	.06

As is the case with other pillars and drivers, there is often a clear divide between performance and expectation. When banners perform comparatively well on local goods, shoppers have notably lower expectations for those stores. The reverse also applies; poor performance tends to come with higher expectations, presenting a clear improvement opportunity for certain banners.

Availability of Local Products In-store



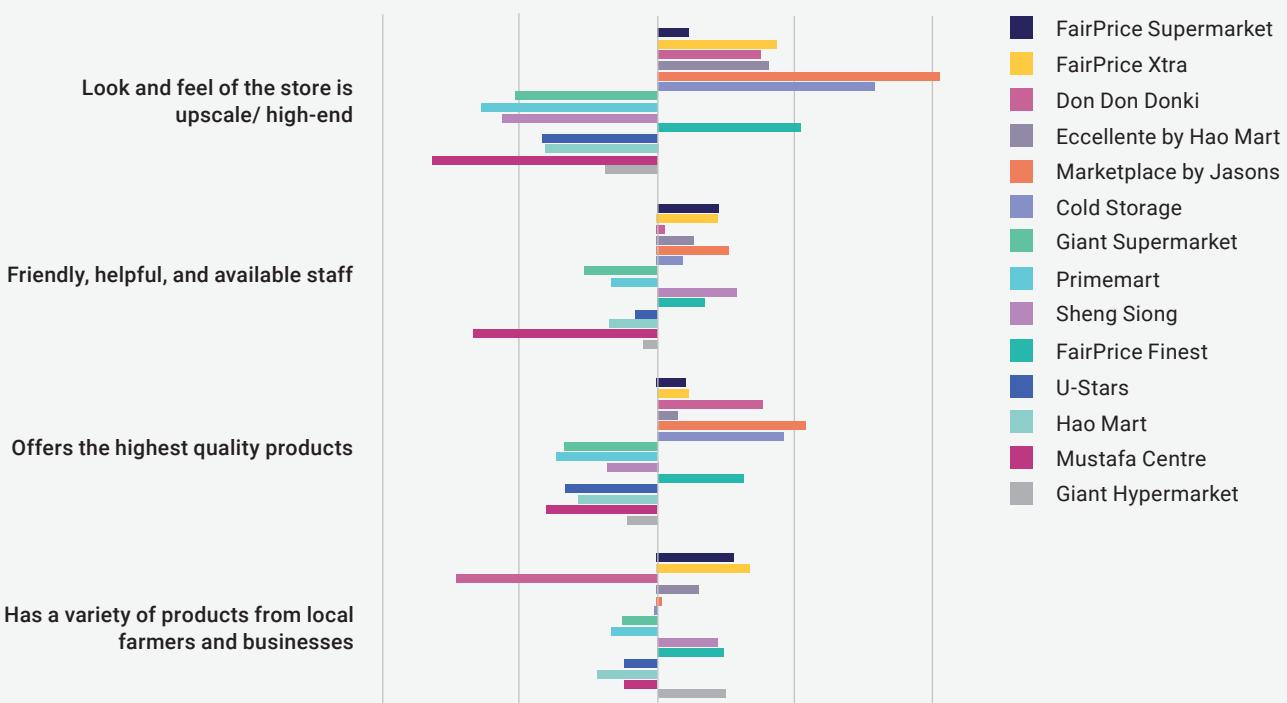
A final word on products from local farmers and businesses

The data we have in this area leads us to two conclusions about the overall importance of locally-sourced goods.

- i. Customers are generally aware that stores carry products from local farmers and businesses – but it is not a dominant feature of any of the stores, nor has any store particularly excelled on this.
- ii. While people may be aware that their stores carry local products, it has little influence on where they ultimately choose to shop. This represents an opportunity for stores to communicate the importance of local products and gain a competitive advantage by owning this area.

This is undoubtedly an area to pay close attention to. And, even now, the impact of emphasising local sourcing on overall performance shouldn't be underestimated; while "products from local farmers and businesses" may be the least influential preference driver in an already low-placed pillar, it still plays a bigger role in driving shopper choice than Online.

The launch of the Fusionopolis venue will only have strengthened Cold Storage's reputation for an upscale look and feel, too. Boasting a wide range of high-quality produce, customisable options such as bento boxes and cheeseboards, a wine bar, and even meeting facilities, the concept store delivers a stunning – if potentially hard to replicate – alternative to traditional grocery²³.



Don Don Donki, the third highest performer here, is noted by respondents primarily for its high-end look and feel and high-quality produce. Focusing heavily on Japanese made and designed goods, the banner is becoming increasingly well-recognised within Singapore as a provider of unique and exclusive grocery options²⁴.

Echoing results from the previous pillar, shoppers tend to believe that High-end Feel is actually less important to the top performers compared with many other banners.

Strengths, weaknesses and opportunities

How can some of Singapore's leading Retailers improve their performance under High-end Feel, and where do they already excel?

Banner	Strongest attribute	Biggest opportunity to improve
FairPrice Xtra	Look and feel of the store is upscale/ high-end	Friendly, helpful, and available staff / The highest quality products
FairPrice Supermarket	A variety of products from local farmers and businesses	The highest quality products
FairPrice Finest	Look and feel of the store is upscale/ high-end	Friendly, helpful, and available staff
Cold Storage	Look and feel of the store is upscale/ high-end	A variety of products from local farmers and businesses
Giant Supermarket	Friendly, helpful, and available staff	Look and feel of the store is upscale/ high-end
Giant Hypermarket	A variety of products from local farmers and businesses	Look and feel of the store is upscale/ high-end
Sheng Siong	Friendly, helpful, and available staff	Look and feel of the store is upscale/ high-end

23. Cold Storage launches innovative new store – IGD Retail – 21st February 2018

24. 12 Foods to buy at Don Don Donki – The Epoch Times

Retailer profile: Don Don Donki

Another banner with a relatively small footprint, Don Don Donki is the Singaporean version of Japanese discount chain Don Quijote. A relative newcomer to the market, the first Donki – as it tends to be known – opened in Orchard Central in 2017²⁵. A further seven locations have been added to the portfolio since, all operated by parent company Pan Pacific International Holdings.

Stocking a wide range of Japanese goods, Don Don Donki stores are recognisable for their bright, cartoonish, and colourful branding and signage. While bento boxes, fruits, and other grocery products take up the majority of each store's floorspace, keen-eyed shoppers will find everything from retro arcade games to peach-scented toilet roll nestled away on shelves²⁶.

Don Don Donki sits in the very middle of our RPI rankings in this study, limited by its Share of Wallet but with an Emotional Connection that approaches that of some of the FairPrice banners. It isn't easy to shop at, nor does it lead the way in Price & Variety, but Don Don Donki offers a great, high-end store experience that shoppers in Singapore love.



25. [https://en.wikipedia.org/wiki/Don_Quijote_\(store\)](https://en.wikipedia.org/wiki/Don_Quijote_(store))

26. The best, worst, and quirkiest things you can buy at Don Don Donki Singapore – AsiaOne – 9th March 2020



Promotions & Customer Engagement

Highest ranking Retailer:
FairPrice Supermarket



Customers love:

“Daily discount offers on certain products.”

“A lot of promotions.”

“It’s easy to collect and redeem points when checking out.”

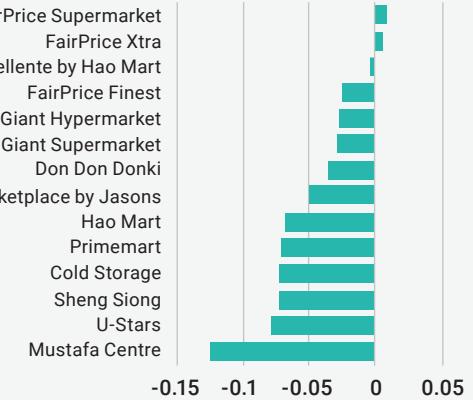
Two of the three FairPrice banners are the leaders in Promotions & Customer Engagement, the sixth pillar in this RPI. FairPrice Supermarket takes top spot, though the difference in placement between it and its hypermarket sister Xtra is very slight indeed.

Promotions & Customer Engagement Value map

Important

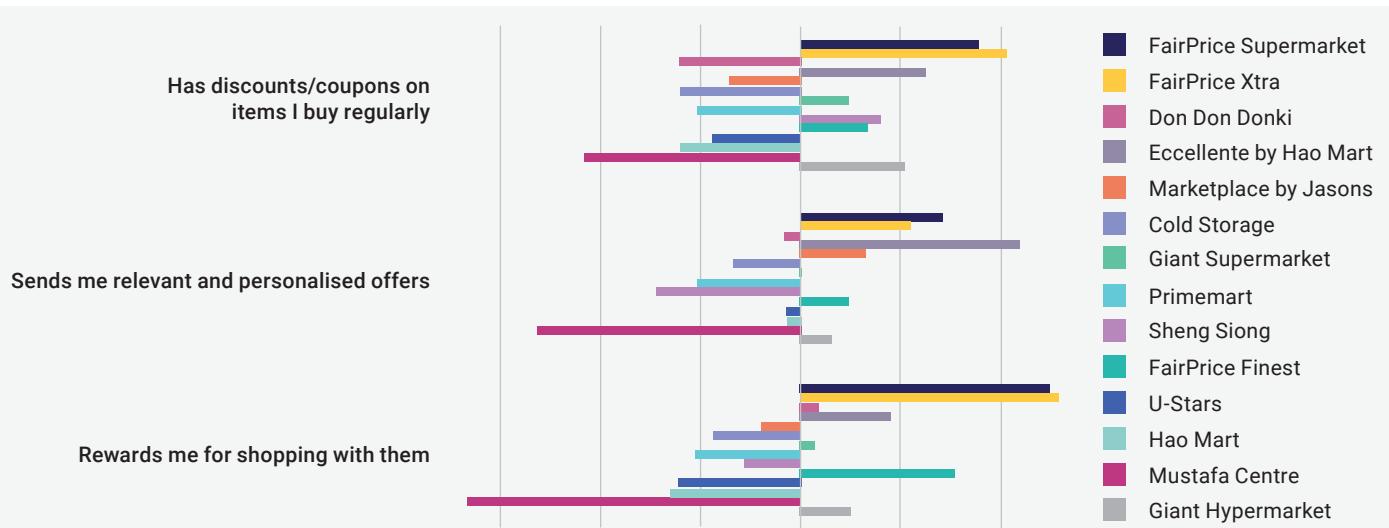


Promotions & Customer Engagement



Promotions & Customer Engagement is an interesting subject in Singapore. As the penultimate pillar, its overall influence on Retailer preference is comparably low, at least in comparison to Ease of Shopping and Price & Variety. At the same time, with the exception of Online, all of the pillars below the top two actually have a similar impact on shopper choice. So, while it might place sixth, Promotions & Customer Engagement is only a little less influential than Store Experience when we look at the data as a whole.

When it comes to individual banners, shoppers have varying opinions about how important Promotions & Customer Engagement are. Expectations are high for the likes of Cold Storage, Eccellente by Hao Mart, and the FairPrice banners, for instance, but much less so for the likes of Mustafa Centre and U-Stars. That lack of expectation, though, doesn't mean that respondents are happy with what they're offered from stores; far from it. Only FairPrice Supermarket and Xtra have positive scores in this category.



FairPrice, of course, focuses on an everyday low pricing strategy and rolls out weekly promotions across its banners – as do Cold Storage, Giant, and Sheng Siong. The personalisation aspect of Promotions – “relevant offers and rewards” – is executed via the overarching NTUC Plus! Card, which allows members to earn and spend rebates across the co-operative group and with other select businesses²⁷. Some 2.3m people are currently subscribed²⁸.

Personalisation has been a major focus for FairPrice banners in recent times. Writing at the end of 2020, Henry Christian – GM at NTUC Link – explained that the company wants to “become... customer-obsessed enough to understand our customers’ needs and behaviours and be there for them when, or even before, they need us,” adding that FairPrice was “working hard to accelerate the enablement of new data-driven marketing and customer engagement capabilities”²⁹.

This emphasis on data and Customer-first strategies seems to be paying off for FairPrice. In addition to the recognition we see in this RPI, the co-op was highly acclaimed at MARKETING-INTERACTIVE’s 2020 Loyalty & Engagement Awards, including a gold for “Best CRM Strategy”.

Eccellente by Hao Mart, another strong performer here (and particularly so around personalisation), will have benefited from the introduction of the group-wide HAO friends digital rewards programme in 2019³⁰. HAO friends allows shoppers to accrue points that can then be used against instore rebates or exclusive merchandise.

Strengths, weaknesses and opportunities

How can some of Singapore’s leading Retailers improve their performance under Promotions & Customer Engagement, and where do they already excel?

Banner	Strongest attribute	Biggest opportunity to improve
FairPrice Xtra	Rewards Customers for shopping with them	Sends Customers relevant and personalised offers
FairPrice Supermarket	Rewards Customers for shopping with them	Sends Customers relevant and personalised offers
FairPrice Finest	Rewards Customers for shopping with them	Sends Customers relevant and personalised offers
Cold Storage	Sends Customers relevant and personalised offers	Has discounts/coupons on items shoppers buy regularly
Giant Supermarket	Sends Customers relevant and personalised offers	Rewards Customers for shopping with them
Giant Hypermarket	Has discounts/coupons on items shoppers buy regularly	Sends Customers relevant and personalised offers
Sheng Siong	Has discounts/coupons on items shoppers buy regularly	Sends Customers relevant and personalised offers

27. FairPrice Profile – IGD Retail Analysis
 28. NTUC Link appoints Sheryl Chen as head of loyalty marketing – MARKETING-INTERACTIVE – 5th January 2021
 29. #LEAwards spills: NTUC Link wants to be even more customer-obsessed in 2021 – MARKETING-INTERACTIVE – 7th December 2021
 30. <https://www.facebook.com/haomartsg/posts/shop-for-groceries-often-save-as-you-shop-with-hao-marts-new-digital-loyalty-pro/1018951928497526/>



Online

Highest ranking Retailer:
FairPrice Xtra



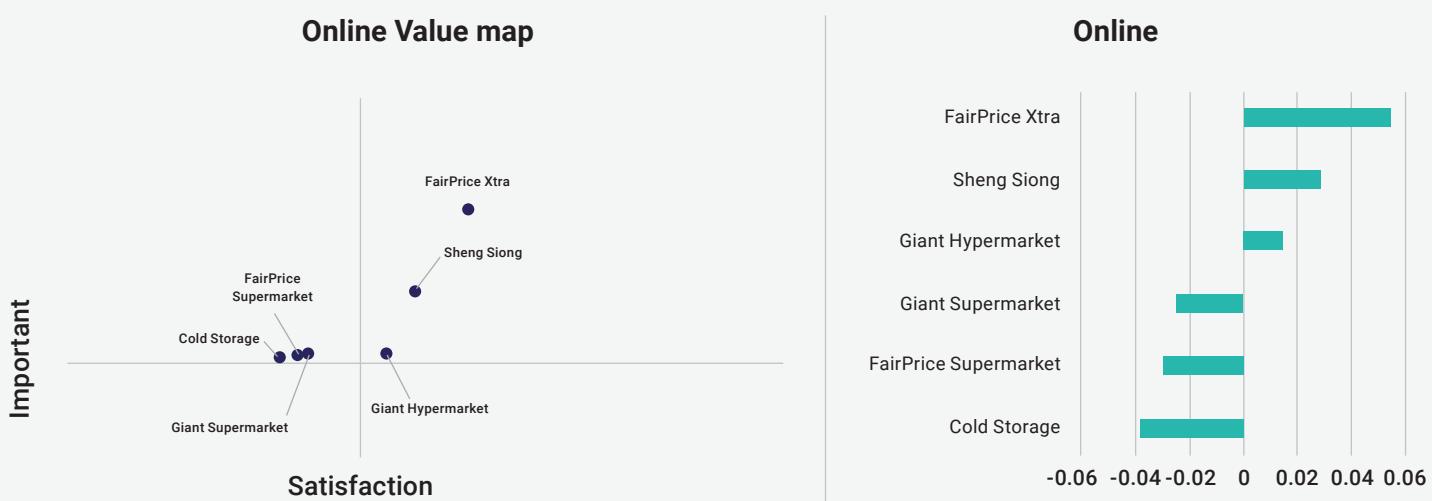
Customers love:

“They sell everything from electrical items and clothes to fresh food.”

“Great variety and value for money.”

“Own brand goods.”

Online is the undoubted outlier of this study: its influence on where shoppers decide to shop is roughly nine times less than that of Promotions & Customer Engagement. Expectation and satisfaction are relatively uniform too; Customers really only look to FairPrice Xtra and Sheng Siong to lead the way, and both banners meet that demand very well. Xtra, in particular, is held in extremely high regard.



For readers interested in specific ecommerce performance amongst individual banners, a full analysis can be found in the following section.

Strengths, weaknesses and opportunities

How can some of Singapore's leading Retailers improve their performance under Online, and where do they already excel?

Banner	Strongest attribute	Biggest opportunity to improve
FairPrice Xtra	Orders are delivered when promised	The right variety of products to meet Customer needs
FairPrice Supermarket	Orders are delivered when promised	The freshest meat, fruits and vegetables
Cold Storage	Online checkout is fast and easy	Orders are delivered when promised
Giant Supermarket	Orders are delivered when promised	Low prices even when not using offers or special deals
Giant Hypermarket	The freshest meat, fruits and vegetables	Regularly purchased items are in stock
Sheng Siong	Orders are delivered when promised	Easy to shop online



Online: results

For the first time in our RPI programme, and given the significant number of Customers who use the channel in Singapore, we made the decision to take an in-depth look at the Republic's online grocery market as part of this study. Doing so not only helped us understand more about what Customers are looking for from their digital Retail experiences, it also allowed us to bring a new set of businesses into our analysis: pureplay Retailers.

Let's look at what we learned, and how Singapore's banners – omnichannel and pureplay alike – are performing.

2021 Singapore RPI: overall results



Overall Performance

Winner:
FairPrice Online



Second place:
Sheng Siong Online

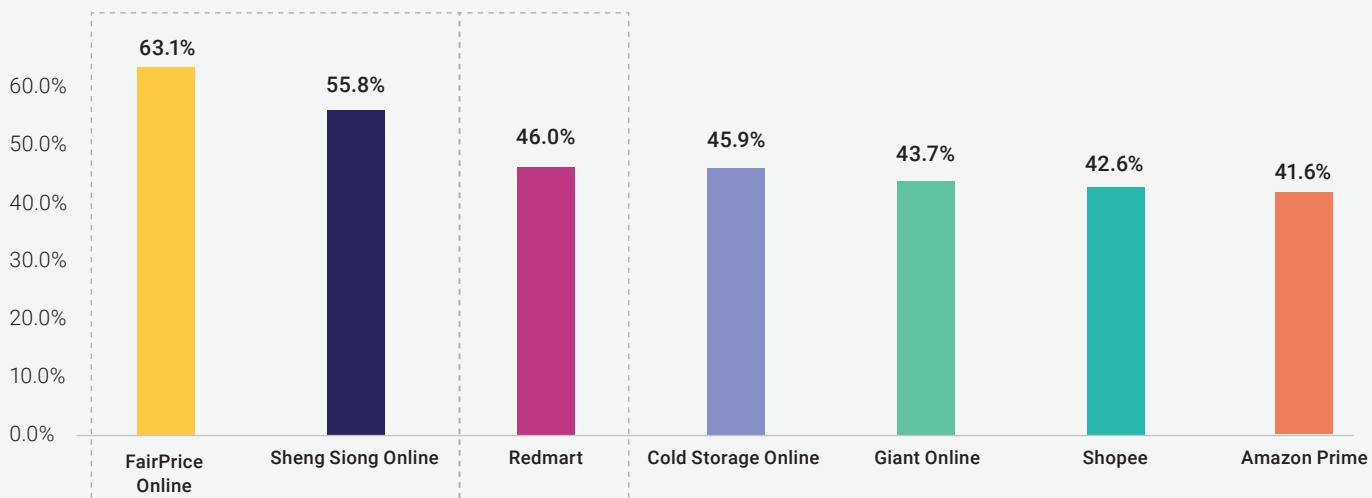


Pureplay top performer:
Redmart



FairPrice's industry leading bricks-and-mortar performance carries through to its digital presence in Singapore – though due more to share of spend than a distinct connection with shoppers. Sheng Siong pushes FairPrice hard, however, and is held off the top spot by a smaller Share of Wallet alone. Amongst the three online-only Retailers, Redmart narrowly edges its peers in an exceedingly tight market.

Total RPI score (online)





Share of Wallet

Winner:
FairPrice Online



Second place:
Sheng Siong Online

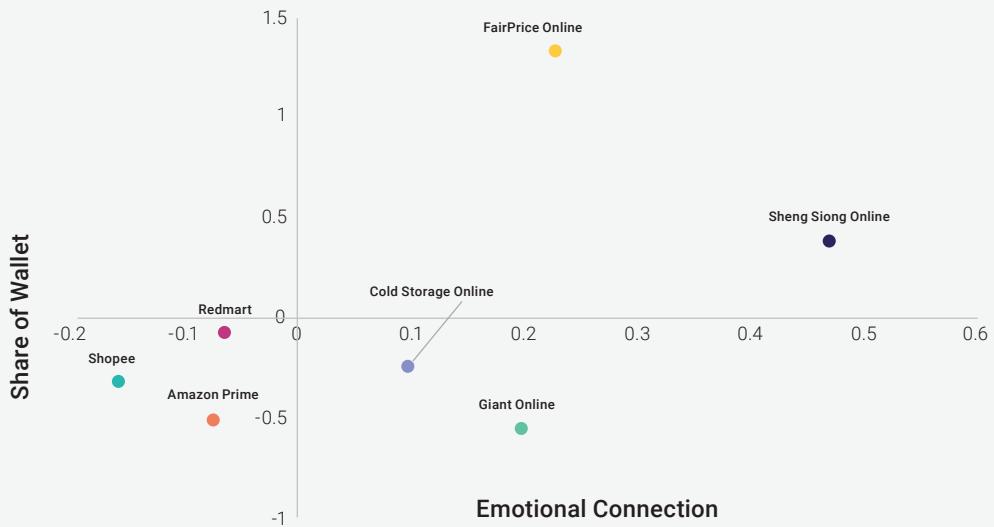


Pureplay top performer:
Redmart



Results here mirror those of overall performance, but FairPrice's large lead is noteworthy. As with its physical stores, more than 50% of the average Customer grocery wallet is spent with FairPrice Online, 70% higher than Sheng Siong and more than 1.5x that of the nearest pureplay competitor in Redmart.

How is the relation between Share of Wallet and Emotional Connection?





Emotional Connection

Winner:

Sheng Siong Online

SHENG SIONG
LINE

Second place:

FairPrice Online

FairPrice

Pureplay top performer:

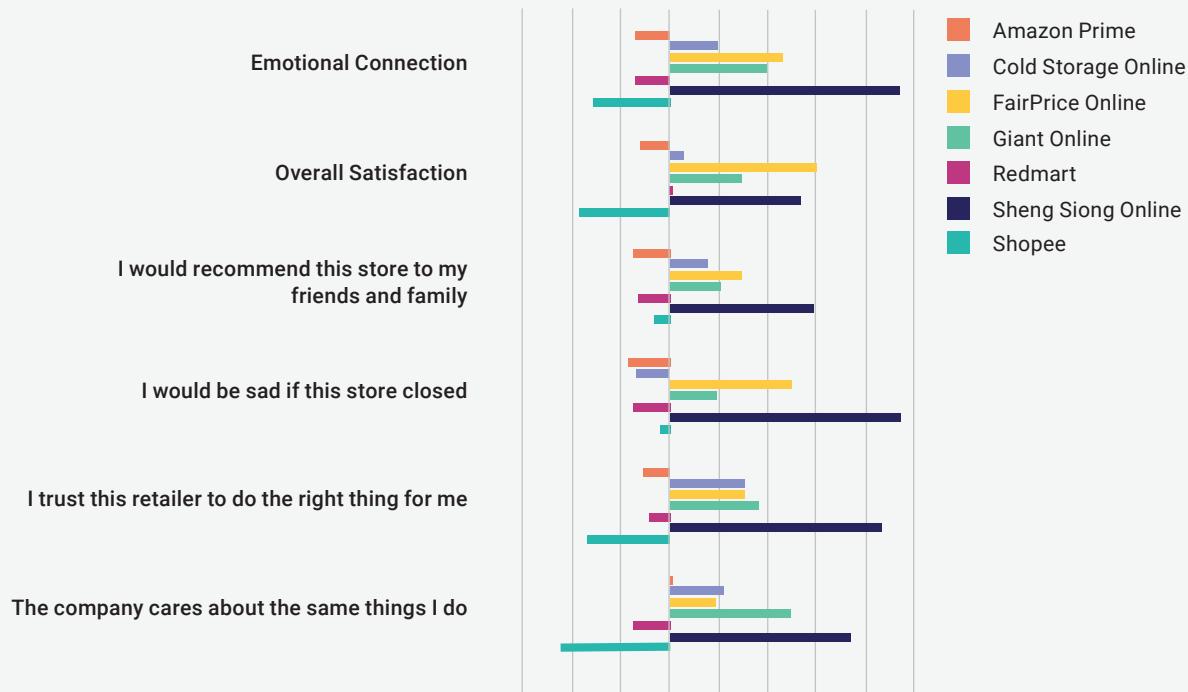
Redmart

redmart™

Sheng Siong ousts FairPrice from the top spot in this final category, with Customers demonstrating an extreme emotional bond with the Retailer's digital business. Respondents say that Sheng Siong Online is the Retailer they would be happiest to recommend to friends and family, make them the saddest if it closed, have the greatest faith in, and believe to share the same goals.

Were Sheng Siong's Share of Wallet a little higher, it would quickly catch up to FairPrice in overall online performance based on the results we see here.

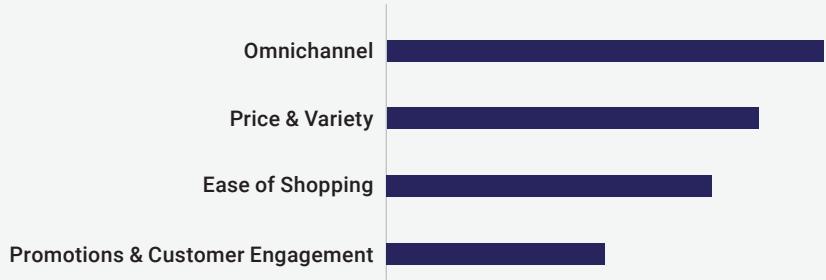
Emotional Connection



Online: pillar results in brief

Four pillars help to influence Retailer preference in online grocery in Singapore.

Overall Pillar Importance

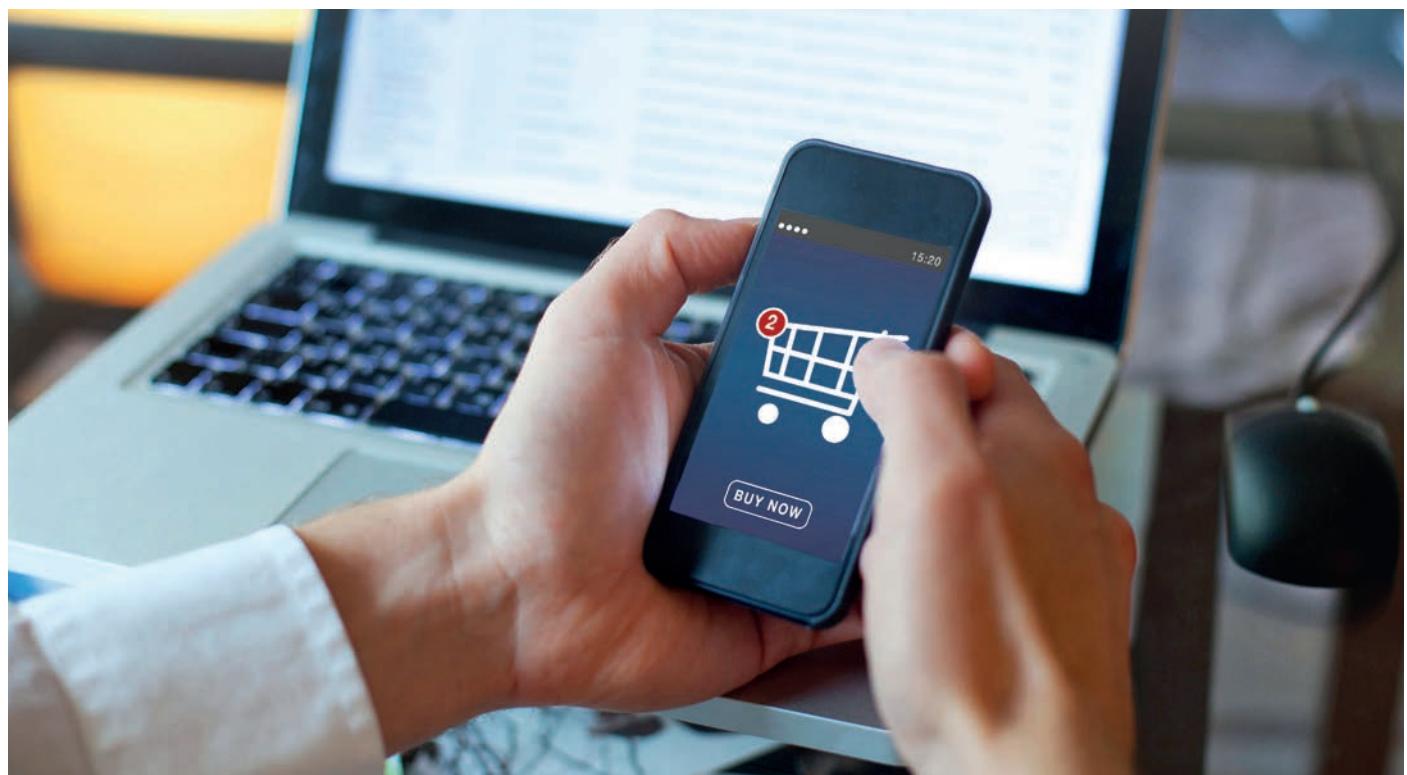


Pillar 1:



Omnichannel

Although there is no “winner” for this pillar – Retailers are either omnichannel or not, after all – having a real world presence plays a major role in helping convince Customers to shop with you digitally. Whether by improving trust, confidence, and accountability, or simply providing more ways for Customers to spend their money, those banners with a physical store in addition to a digital one are much more likely to be favoured by shoppers in Singapore.





Price & Variety

Winner:
Sheng Siong Online



Highly rated for both the quality of its produce and the variety of goods from local farmers and suppliers, Sheng Siong Online is seen as the market leader in terms of Price & Variety. The company is a notable supporter of Singapore agriculture, carrying goods from Quan Fa Organic Farm, Yili's Veg, and egg producer N&N amongst others³¹.

Giant Online, a close competitor in this pillar, is called out by shoppers for their ability to get everything they need in one place, and for good prices on own/private label brands. Giant's decision to cut prices on essential items in-store in late 2020 also carried over to its online service.

Strengths, weaknesses and opportunities

How can some of Singapore's leading online Retailers improve their performance under Price & Variety, and where do they already excel?

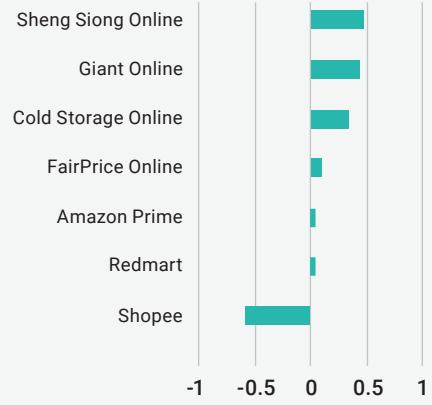
Banner	Strongest attribute	Biggest opportunity to improve
FairPrice Online	A wide variety of own/private label products / Good prices on own/private label products	The freshest meat, fruits and vegetables / A wide variety of natural and organic products
Giant Online	Good prices on own/private label products	Good prices on natural and organic products
Cold Storage Online	A wide variety of natural and organic products	Customers can do all of their shopping at a single store
Sheng Siong Online	A wide variety of products from local farmers and businesses	Customers can do all of their shopping at a single store

Important

Price & Variety Value map



Price & Variety



31. <https://corporate.shengsiong.com.sg/sustainability-journey-4/>



Ease of Shopping

Winner:
Giant Online



Giant, while not a standout performer under Ease of Shopping in our “offline” RPI, emerges as the winner in the digital version of this category. The three pureplay Retailers trail, though only Redmart truly comes close to matching the Dairy Farm banner.

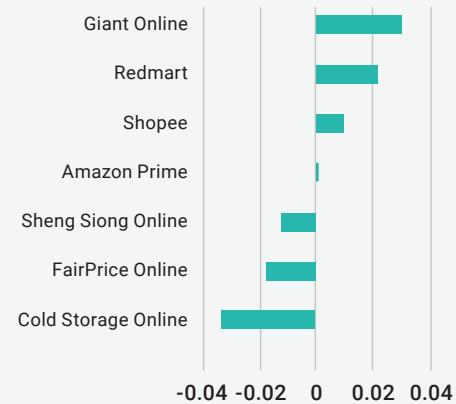
Generally, the quality of the experience seems to be highly varied in this pillar. Retailers may excel in one area, and trail quite far in another. Sheng Siong is highly rated for the ease with which Customers can shop, for instance, but respondents are less satisfied with the speed and ease of its online checkout; the exact opposite is true for Amazon. A detailed understanding of where Customers believe the offering needs to improve is essential in this pillar.

Online Ease of Shopping Value map

Important



Online Ease of Shopping



Strengths, weaknesses and opportunities

How can some of Singapore’s leading online Retailers improve their performance under Ease of Shopping, and where do they already excel?

Banner	Strongest attribute	Biggest opportunity to improve
FairPrice Online	Online checkout is fast and easy	It's easy to shop online with this Retailer
Giant Online	It's easy to shop online with this Retailer	Online checkout is fast and easy
Cold Storage Online	Online checkout is fast and easy	It's easy to shop online with this Retailer
Sheng Siong Online	It's easy to shop online with this Retailer	Online checkout is fast and easy



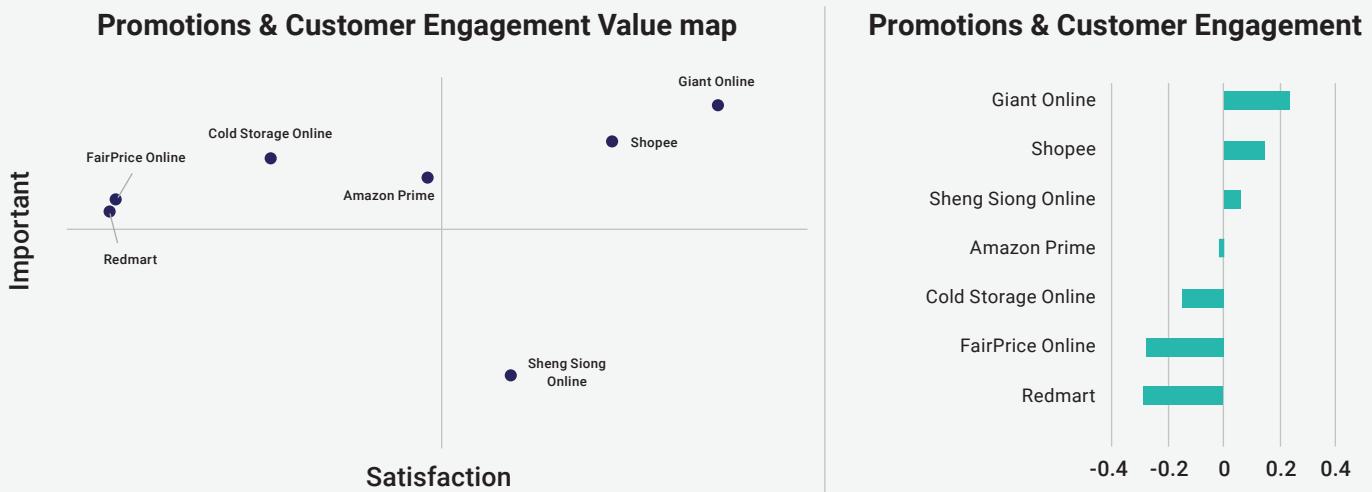
Promotions & Customer Engagement

Winner:
Giant Online



Promotions & Customer Engagement essentially combines elements of the Price & Variety and Promotions & Customer Engagement pillars from our in-store study. As a result, drivers include rewards, personalisation, and everyday low prices, with an additional aspect in the form of new and interesting product recommendations.

Giant Online is seen to be the best performing banner here, suggesting that the company's online arm goes some way beyond its super- and hypermarket equivalents; both received average rankings in relation to these issues in our in-store analysis. Giant scores particularly highly in areas relating to personalisation, as does Sheng Siong which takes third place in this pillar.



Strengths, weaknesses and opportunities

How can some of Singapore's leading online Retailers improve their performance under Promotions & Customer Engagement, and where do they already excel?

Banner	Strongest attribute	Biggest opportunity to improve
FairPrice Online	Rewards Customers for shopping with them	Shares new/interesting products with Customers
Giant Online	Shares new/interesting products with Customers	Has discounts/coupons on items shoppers buy regularly
Cold Storage Online	Shares new/interesting products with Customers	Rewards Customers for shopping with them
Sheng Siong Online	Has low prices even when not using offers or special deals	Sends Customers relevant and personalised offers

In comparison: Singapore and other nearby markets

With our RPI programme now covering a number of countries around the world, we have the opportunity to look at shopper behaviour in Singapore as it compares to other nearby markets. While the results of each RPI don't allow for a direct comparison between factors such as Emotional Connection or Retailer performance, we can still draw some interesting observations about the grocery market in Singapore against a wider backdrop.

Presented in this section are results from the Singapore RPI alongside those from recent studies in South Korea, Thailand, and Australia.

Multinationals perform well in other RPIs in the region

Singapore's star performers are the homegrown FairPrice banners, FairPrice Supermarket and FairPrice Finest. In other Asian markets, however, banners from further afield take the lead. Costco (South Korea) and Tesco Hypermarket (Thailand) are the strongest performers in our other studies.

Country	Strongest RPI	2nd Strongest
Singapore	FairPrice Supermarket	FairPrice Finest
South Korea	Costco	Emart Everyday
Thailand	Tesco Hypermarket	Big C
Australia	Woolworths	Coles

Preference is driven by similar factors across the region

Shoppers in South Korea, Thailand, and Australia look to Retailers to deliver on similar things as do those in Singapore. Ease of Shopping, Price, Variety, and Store Experience are all significant drivers of preference in studies from nearby markets. Only in Thailand is there any significant variation; Quality is the primary driver there.

	Singapore	South Korea	Thailand	Australia
Most important pillar	Ease of Shopping	Price & Promotions	Quality of Offer (including organics)	Ease of Shopping
2nd most	Price & Variety	Store Experience	Variety	Variety
3rd most	Store Experience	Ease of Shopping	Ease of Shopping	Price

Loyalty varies, but the FairPrice effect cannot be underestimated

The dunnhumby Loyalty Index adjusts for the number of stores in a market, and so provides a true view of how closely shoppers stick to a banner. South Korea has the overall highest score on the Index, but Singapore's score doesn't convey the extreme dominance of FairPrice – as discussed earlier. While the best performer in South Korea enjoys a 30% Share of Wallet, FairPrice Supermarket's 54% is an unprecedented result.

	Loyalty Index*
Singapore	1.9
South Korea	2.8
Thailand	1.6
Australia	N/A
All Other Countries (excluding Singapore, South Korea and Thailand)	2.1

*Loyalty index is the average share of wallet at a given store compared to people randomly spending their money

The closer to 1, the less loyalty in the market or for the store.

Country	Average share of wallet	Share of wallet - highest RPI
Singapore	12%	54%
Thailand	11%	25%
South Korea	18%	30%
Australia	N/A	N/A
All Other countries	20%	33%

South Korean shoppers stay loyal to a smaller group of Retailers; others less so

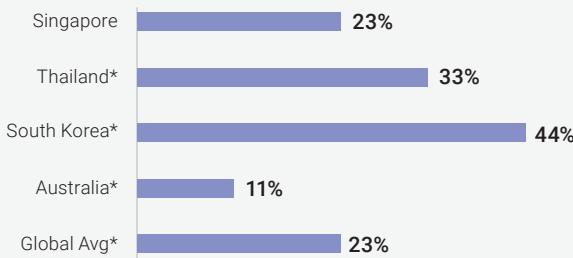
Another way to explore loyalty is to look at the number of other stores that Customers shop on a monthly basis. Frequenting an average of nine stores, shoppers in Singapore do the most “cross-shopping” across banners – though Customers from Thailand and Australia do not trail that far behind. In South Korea, Customers tend to limit their trips to a much smaller selection of stores.

Country	# of stores shopped past month	# stores included in study	% of available stores shopped past month
Singapore	9.4	14	67%
Thailand	6.5	12	54%
South Korea	5.1	23	22%
Australia	2.6	5	52%

Worries about Covid-19 are higher in nearby markets

In Singapore, worries about Covid-19 track directly in line with the global average (23%). Concerns are significantly higher in both Thailand (33%) and South Korea (44%) however, with shoppers in those countries more likely to take preventative action as result. Seeking to limit their exposure, Shoppers in Thailand and South Korea have been taking fewer trips to the store, ordering more online, and getting more food delivered by restaurants.

Worry Index**



How People Have Adapted Their Shopping Behaviour Due to Covid-19

	Singapore	Thailand*	South Korea*	Australia*
Take fewer trips to store	49%	56%	55%	46%
Order more online	37%	50%	51%	20%
Shop in fewer stores	35%	62%	40%	37%
Spend more on each trip	29%	46%	22%	20%
Order delivery from restaurants	26%	53%	53%	27%
Have RTE delivered	24%	56%	57%	20%
Buy fewer fresh products	13%	41%	31%	18%
None	12%	4%	8%	11%

* Results for all countries except Singapore are taken from the February wave of the Covid-19 pulse study conducted by dunnhumby. The questions used to calculate the Worry Index are consistent for all markets.

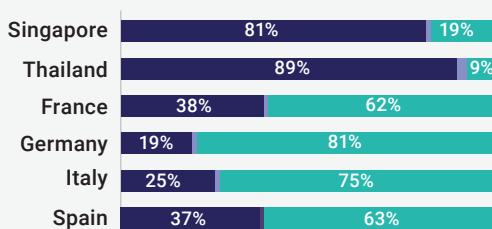
** The Worry Index is a combination of three questions: 1) I am very worried about the virus; 2) I am concerned that I, someone in my family, may contract the virus; 3) I don't feel safe from infection while shopping in the store

The dominance of omnichannel in Asia becomes clear when taking a wider view

Looking further afield to Europe, we can see just how important ecommerce is to the Asian market. While omnichannel accounts for the vast majority of shopping in Singapore (81%) and Thailand (89%), penetration in Western markets is significantly lower. Omnichannel – on average – represents less than a third (30%) of the shopping done in France, Germany, Italy, and Spain.

Shopping by Channel

■ Omnichannel ■ Digital only ■ In-Store only



Conclusion and key takeaways

The results of this inaugural RPI study present us with detailed insight into the challenges and opportunities facing Singapore's grocery Retailers. Crucially, we see a clear correlation between pillar performance and overall RPI score; those banners that best meet the needs of shoppers in Singapore today tend to be rewarded with a higher Share of Wallet and better Emotional Connection with their Customers.

For any Retailer seeking to improve its RPI performance, four issues stand out in particular as areas of focus:



The dominance of the FairPrice banners makes this a tough market in which to compete

Few of the markets we study trend so heavily towards a single group of companies as does Singapore. Capturing nearly half of the nation's grocery spending, and present in three of the top four places in the RPI rankings, the FairPrice banners are fierce competitors indeed.

The ray of hope for others here lies in the relative "disloyalty" of shoppers. FairPrice Customers don't shop that banner in isolation; they'll visit numerous other stores in the same month. The key for competing chains is to identify which needs they serve that FairPrice doesn't, and zero in on them. Customer understanding is absolutely vital here.



Shoppers treat some pillars as "basic requirements" for those they see as top performers

Comparing shopper expectations with perceived performance under each pillar leads to an interesting observation about what Customers really want. In several instances, when banners perform well in a certain area, shoppers also say that it isn't actually important for that store to do so.

The likelihood here is that these banners perform so well in a specific area that shoppers have come to treat this above average capability as a "basic requirement" for the store. FairPrice Xtra in the area of Sustainable & Own/ Private Label, and Marketplace by Jasons in High-end Feel present two examples of this. Performance is high while expectations are low, though any dip in those already stellar standards would be rapidly noticed.



Online has little impact on offline choice – but the same is not true in reverse

Ecommerce is a major factor for the grocery market in Singapore. At the same time, the choice of where Customers shop online has very little impact on where they decide to shop in-store; Giant Online Customers don't necessarily default to Giant Hypermarket, for instance.

The opposite is also true, however. Omnichannel presence is a key differentiator when it comes to online choice, and Customers are much more likely to buy groceries from digital stores with whom they already shop in person. For any banner looking to launch or grow its online presence, their existing Customer base is almost certainly the best place to begin.



The complexity of the market provides strong ground for differentiation

The Singapore grocery market is complex. While the two leading pillars (Ease of Shopping and Price & Variety) do have a greater sway on preference than others, the difference between them is not so great that Retailers cannot achieve strong differentiation by focusing on other tactics.

Ease of Shopping provides clear evidence of this. While it may be the key preference pillar in this RPI, Retailer performance here is actually fairly uniform. With some exceptions, banners are separated by just a few points in this area and Customers are broadly satisfied wherever they choose to shop. For Retailers seeking to win business and loyalty, this homogeneity makes it even more important to differentiate themselves in other areas.

Appendix

Included in this section is in-depth insight into cross-shopping, and category performance across physical and digital channels.

Where else do respondents shop?

Also shop at:	Amazon Prime	Cold Storage	Don Don Donki	Eccellente by Hao Mart	FairPrice Finest	FairPrice Supermarket	FairPrice Xtra	Giant Hypermarket	Giant Supermarket	Hao Mart	Marketplace by Jasons	Mustafa Centre	Primemart	Redmart	Sheng Siong	Shopee	U-Stars
Amazon Prime	38%	41%	58%	36%	34%	38%	40%	39%	52%	57%	52%	45%	56%	37%	43%	55%	
Cold Storage	89%		91%	93%	85%	82%	87%	87%	91%	96%	93%	90%	89%	86%	87%	89%	
Don Don Donki	67%	63%		80%	60%	57%	64%	62%	61%	74%	77%	66%	65%	70%	61%	65%	72%
Eccellente by Hao Mart	35%	24%	30%		23%	22%	26%	25%	25%	58%	41%	35%	33%	31%	25%	26%	47%
FairPrice Finest	89%	90%	92%	93%		87%	93%	91%	90%	92%	94%	93%	92%	91%	90%	90%	92%
FairPrice Supermarket	95%	98%	98%	98%	97%		99%	98%	98%	98%	98%	99%	99%	97%	99%	98%	99%
FairPriceXtra	79%	78%	84%	89%	80%	75%		82%	82%	86%	89%	88%	86%	83%	80%	80%	85%
Giant Hypermarket	86%	82%	84%	91%	80%	77%	86%		93%	89%	91%	94%	91%	85%	85%	83%	92%
Giant Supermarket	85%	82%	83%	90%	81%	78%	86%	94%		90%	91%	94%	92%	86%	86%	85%	92%
Hao Mart	42%	32%	38%	78%	31%	29%	34%	34%	34%		50%	46%	42%	39%	33%	34%	58%
Marketplace by Jasons	52%	37%	43%	61%	35%	32%	38%	38%	37%	55%		57%	49%	47%	37%	39%	59%
Mustafa Centre	54%	42%	43%	59%	39%	37%	44%	45%	44%	58%	66%		56%	50%	45%	45%	66%
Primemart	53%	45%	47%	62%	44%	42%	48%	49%	49%	59%	62%	63%		51%	49%	47%	76%
Redmart	74%	51%	57%	68%	49%	47%	52%	52%	52%	63%	69%	64%	58%		52%	58%	66%
Sheng Siong	80%	79%	81%	88%	78%	76%	81%	83%	83%	87%	86%	92%	91%	83%		81%	92%
Shopee	84%	73%	79%	85%	72%	70%	75%	75%	76%	81%	86%	84%	79%	86%	75%		81%
U-Stars	28%	20%	23%	40%	19%	18%	21%	22%	22%	36%	34%	32%	34%	25%	22%	21%	

Under-indexes on cross-shopping



Over-indexes on cross-shopping

In-store: which categories bring Customers to each banner?

Category	Index														
	Cold Storage	Don Don Donki	Eccellente by Hao Mart	FairPrice Finest	FairPrice Supermarket	FairPrice Xtra	Giant Hypermarket	Giant Supermarket	Hao Mart	Marketplace by Jasons	Mustafa Centre	Primemart	Sheng Siong	U-Stars	
Alcohol	1.26	1.13	1.51	0.76	0.58	0.56	0.87	0.88	1.17	1.75	0.79	0.89	0.60	1.24	
Baby products	0.76	0.28	2.44	0.32	0.29	0.47	0.91	0.36	1.30	1.32	1.69	1.19	0.33	2.34	
Bakery	1.29	0.75	1.06	1.03	1.07	0.94	1.21	1.11	0.95	1.23	0.78	0.94	0.86	0.79	
Canned goods	0.75	0.65	0.82	1.13	1.30	1.19	1.26	1.12	1.03	0.64	0.65	1.14	1.27	1.04	
Confectionery & snacks	1.12	1.94	1.02	0.75	0.82	0.86	0.85	0.86	1.05	1.07	0.95	0.89	0.94	0.88	
Dairy, Chilled & Eggs	1.32	0.52	0.79	1.21	1.19	1.09	0.97	1.09	0.91	1.07	0.61	1.04	1.26	0.93	
Drinks	0.94	1.08	0.94	0.98	1.07	0.96	1.02	0.98	1.22	0.88	0.71	1.10	1.03	1.09	
Dry Groceries	0.78	0.88	0.78	0.98	1.07	1.02	1.11	1.30	1.01	0.61	1.31	1.03	1.10	1.02	
Fresh Meat	1.15	1.06	0.74	1.18	1.09	1.08	0.99	1.03	0.65	1.30	0.59	1.01	1.30	0.84	
Fresh Produce	1.20	0.54	0.64	1.09	1.13	1.10	1.02	1.35	0.84	0.94	0.59	1.23	1.32	1.00	
Frozen Food	1.25	1.02	0.81	1.19	1.13	1.17	1.08	0.90	0.93	0.83	0.74	0.96	1.21	0.79	
Hardlines	0.56	0.65	2.76	0.37	0.23	0.65	1.05	0.46	0.98	0.94	2.84	0.74	0.17	1.60	
Health	0.52	0.86	1.40	0.71	0.74	1.24	0.64	0.61	1.12	1.31	2.37	0.79	0.35	1.35	
Household items	0.60	0.50	0.85	1.11	1.39	1.23	1.18	1.23	1.13	0.51	1.34	1.00	1.05	0.88	
Natural/Organic Products	1.32	0.53	1.18	1.20	0.57	0.79	0.66	0.50	1.18	2.27	1.55	0.90	0.29	1.05	
Personal Care / Daily Essentials	0.65	0.50	1.17	1.17	1.04	1.13	0.91	0.98	1.02	0.77	2.16	0.90	0.80	0.80	
Pet	0.60	0.82	1.83	0.97	0.21	0.33	0.93	0.44	0.92	1.39	0.60	1.41	1.08	2.46	
Ready-to-Eat Meals	1.34	3.93	1.05	0.56	0.51	0.65	0.71	0.56	0.93	1.30	0.86	0.51	0.38	0.69	
Seafood	0.80	0.92	0.98	1.21	1.10	1.07	1.08	1.01	0.74	1.11	0.57	1.11	1.42	0.87	
Softlines	0.69	0.79	1.91	0.64	0.29	0.87	0.79	0.72	1.09	1.28	2.30	0.93	0.23	1.47	
Tobacco	0.38	0.80	2.48	0.28	0.20	0.14	0.43	0.57	2.73	0.74	0.52	1.31	0.35	3.06	

Online: which categories bring Customers to each banner?

Category	Index						
	Amazon Prime	Cold Storage Online	FairPrice Online	Giant Online	Redmart	Sheng Siong Online	Shopee
Alcohol	1.19	1.34	0.71	1.42	1.13	0.40	0.81
Baby products	1.52	0.75	0.57	1.41	0.40	0.52	1.83
Bakery	0.90	0.99	1.34	1.24	0.86	1.36	0.30
Canned goods	0.91	1.21	1.13	1.00	1.28	0.91	0.55
Confectionery & snacks	0.93	0.79	1.31	0.79	1.21	0.91	1.06
Dairy, Chilled & Eggs	0.53	1.58	1.44	0.88	1.20	1.01	0.37
Drinks	0.85	0.99	1.18	0.97	1.27	1.09	0.66
Dry Groceries	1.11	0.58	1.10	0.96	1.60	0.87	0.77
Fresh Meat	0.76	1.25	1.25	0.98	0.78	1.65	0.34
Fresh Produce	0.59	1.22	1.69	0.83	0.95	1.51	0.21
Frozen Food	0.67	1.43	1.41	0.93	1.24	0.92	0.40
Hardlines	1.57	1.07	0.18	1.27	0.35	0.59	1.98
Health	1.22	0.66	0.52	0.92	0.44	0.80	2.43
Household items	1.26	0.42	0.92	0.88	1.21	0.75	1.56
Natural/Organic Products	1.69	1.75	0.37	0.87	0.52	1.21	0.59
Personal Care / Daily Essentials	1.24	0.29	0.63	0.77	1.00	0.60	2.48
Pet	1.07	1.29	0.00	1.07	0.61	1.34	1.61
Ready-to-Eat Meals	0.75	1.36	0.88	1.24	0.67	1.35	0.75
Seafood	0.76	1.00	0.90	1.17	0.82	1.96	0.38
Softlines	1.25	1.16	0.26	1.16	0.48	0.64	2.05
Tobacco	1.58	1.14	1.30	2.22	0.33	0.00	0.44

21 retailers included in this study

Channel	Brand	Banner
In-store	FairPrice	FairPrice Supermarket FairPrice Finest FairPrice Xtra
	Sheng Siong	Sheng Siong
	Giant (Diary Farm Group)	Giant Hypermarket Giant Supermarket
	Cold Storage (Diary Farm Group)	Cold Storage
	Marketplace by Jasons (Diary Farm Group)	Marketplace by Jasons
	Primemart	Primemart
	Don Don Donki	Don Don Donki
	Mustafa Centre	Mustafa Centre
	U - Stars	U - Stars
	Hao Mart	Eccellente by Hao Mart Hao Mart
Online	FairPrice	FairPrice Online
	Sheng Siong	Sheng Siong Online
	Redmart	Redmart
	Cold Storage (Diary Farm Group)	Cold Storage Online
	Giant (Diary Farm Group)	Giant Online
	Shopee	Shopee
	Amazon	Amazon Prime



dunnhumby

THE WORLD'S FIRST
CUSTOMER DATA SCIENCE PLATFORM

dunnhumby is the global leader in Customer Data Science, empowering businesses everywhere to compete and thrive in the modern data-driven economy. We always put the Customer First. Our mission: to enable businesses to grow and reimagine themselves by becoming advocates and champions for their Customers.

With deep heritage and expertise in retail – one of the world's most competitive markets, with a deluge of multi-dimensional data – dunnhumby today enables businesses all over the world, across industries, to be Customer First.

The dunnhumby Customer Science Platform is our unique mix of technology, software and consulting enabling businesses to increase revenue and profits by delivering exceptional experiences for their Customers – in-store, offline and online. dunnhumby employs over 2,000 experts in offices throughout Europe, Asia, Africa, and the Americas working for transformative, iconic brands such as Tesco, Coca-Cola, Meijer, Procter & Gamble, Raley's, L'Oreal and Monoprix.

We also produce retailer preference indices (RPIs) to enable retailers around the world to learn how customers perceive them and begin taking action to improve their rankings.



Connect with us to start the conversation

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