

 **RXBX 500**

in partnership with

 **TEALIUM**

BrandIndex

RXBEU22RP

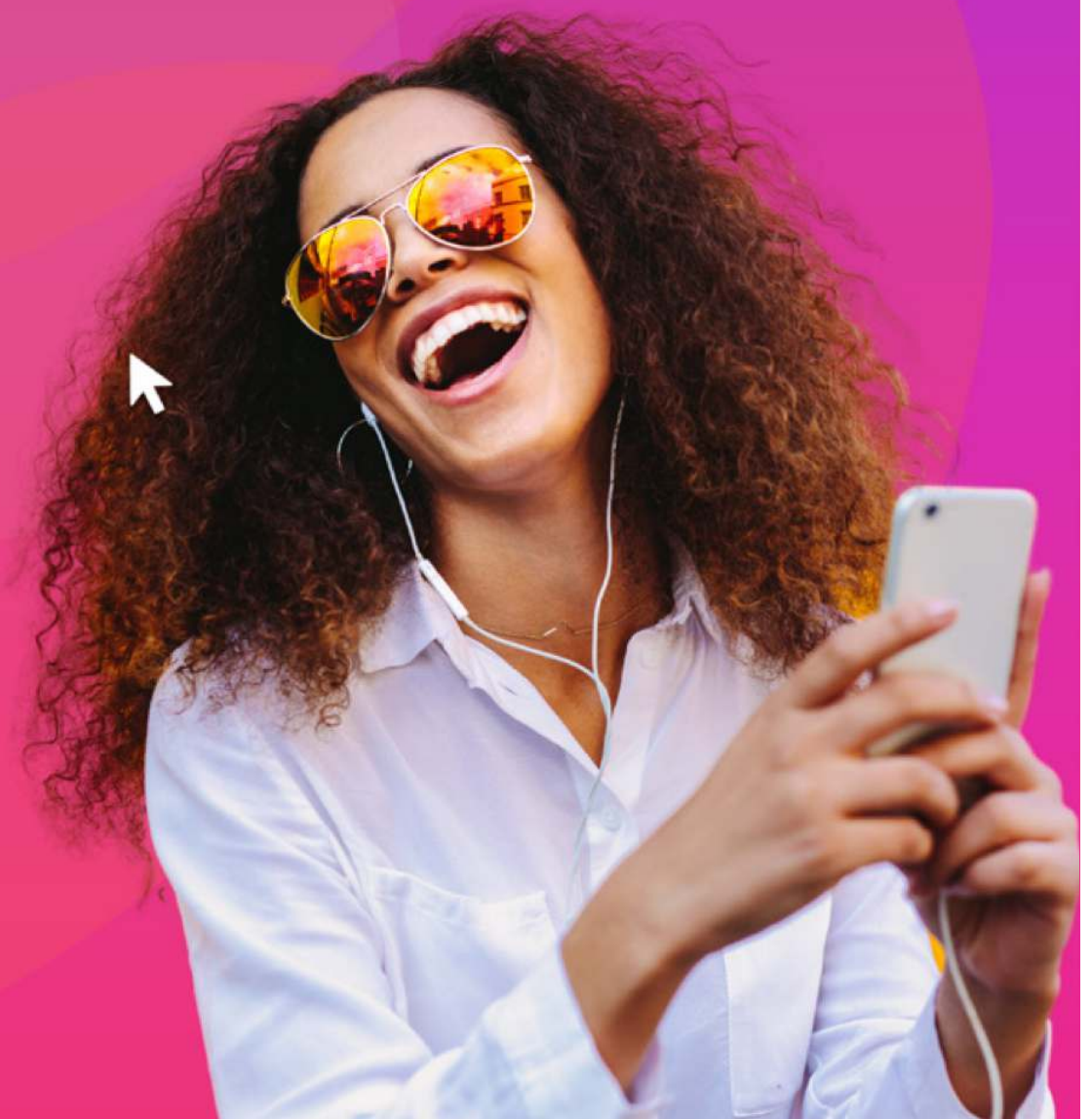
Europe

2022



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FROM THE EDITOR-IN-CHIEF



Welcome to the RetailX Brand Index 2022. This report comes as retail has moved on from the restrictions of Covid-19 lockdowns, only immediately to face new challenges as a result of Russia's invasion of Ukraine. Both are now having knock-on effects for the cost of living as prices, especially those of energy, climb sharply, which is likely to deter shoppers from buying. When they do buy, they will choose carefully, so brands will have to work hard to ensure that their customers continue to buy from

them. Ensuring this loyalty means offering the kind of seamless service across channels that meets expectations, while many customers will continue to prioritise the sustainability of the products they buy, as well as the ways in which they are packaged and delivered.

This report names the largest 500 brands that sell to customers in the 32 markets of the EU, EEA plus the UK and Switzerland. They are ranked in an index that is based on footprint size as well as their performance through six Performance Dimensions – The Customer, Engagement, Merchandising, Mobile & Cross-channel, Operations & Logistics, and Strategy & Innovation. A series of research-led features, illustrated by easy-to-read RetailX graphics, explores the tools and retail strategies that brands use across their business, before naming the brands that stand out in each Dimension.

We explore the wider context through our strategic overview, then focus on how brands now engage with shoppers, as well as how shoppers expect to engage with brands. In a series of examples, we look at how leading brands that include Disney, Pandora, Lascana, Givenchy and The Body Shop approach multichannel retailing in practice.

The Brand Index 2022 is designed to enable brands of all sizes to see how they measure up to the performance of leading brands that sell in some of the world's largest markets, as well as to understand and learn from what works for market leaders. We hope you find it useful. ■

Ian Jindal, chief executive, RetailX

OUR METRICS

Our research covered seven Performance Dimensions

OUR METRICS

0. **FOOTPRINT:**
UK retail turnover, ecommerce turnover, web reach and store estate of brands give the 'heft' and a preliminary rank. We then modify and weight that analysis through consideration of the following Dimensions:
1. **STRATEGY & INNOVATION:**
the extent to which the brand is adapting for growth, international commerce and customer responsiveness
2. **THE CUSTOMER:**
measuring the experience from the customer's point of view
3. **OPERATIONS & LOGISTICS:**
delivery, returns, collections
4. **MERCHANDISING:**
displaying and describing products
5. **ENGAGEMENT:**
making their brands familiar to the customer and connecting with them
6. **MOBILE & CROSS-CHANNEL:**
beyond single ecommerce or store channels

PERFORMANCE CLUSTERS

We've ranked the Europe Brand Index 500 in statistically similar groups. Elite retailers have performed at an exceptional level across all Dimensions, statistically separate from the subsequent clusters. In 2022, these are Claire's, H&M, L'Occitane, Marks & Spencer and Tripp. Our congratulations to all.

Top50 retailers bring us to the 50-retailer point and represent the current standard of UK best practice in ecommerce and multichannel retailing, exemplifying RetailCraft at its best.

Between the Top100 and the Top500, retailers are grouped to express their measured performance in a way that goes beyond their variation in size, reach and turnover. Throughout 2022, we will be continuing our testing and measurement of the whole group, with our findings contributing to the 2023 ranking.

JUDGEMENT

Our current system started with what was then called the IRUK Top500 in 2015. Since then, research methods and metrics have developed steadily. The criteria regarded as cutting edge this year will necessarily differ from those of last year, since innovations move into the mainstream.

KNOWLEDGE PARTNERS

We thank BuiltWith for tracking the Top500 websites and providing information on the software used, such as ecommerce platform and payment methods, and SimilarWeb for sharing data on the visits and interaction that Top500 websites receive.

ELITE RETAILERS

Congratulations once more to the RetailX Top500 Elite retailers for 2022: Claire's, H&M, L'Occitane, Marks & Spencer and Tripp.

Ian Jindal, Editor-in-Chief

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MEET THE TEAM



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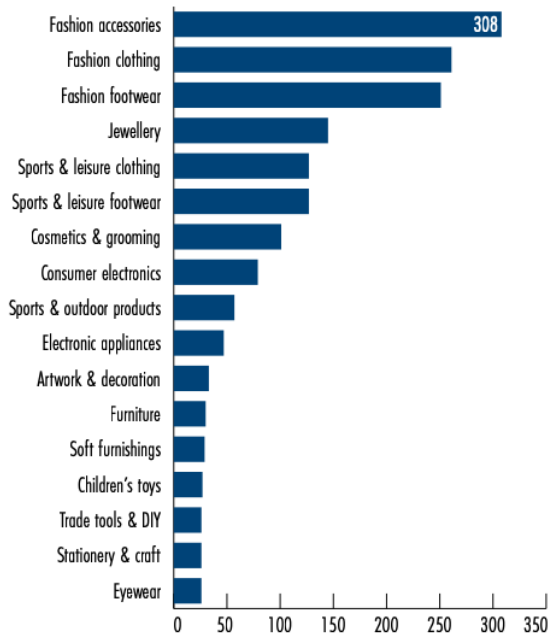


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ABOUT THE EUROPE BRAND INDEX TOP500 2022

Figure 1. What do the Top500 sell?

The number of brands that sell a significant number of products in each category



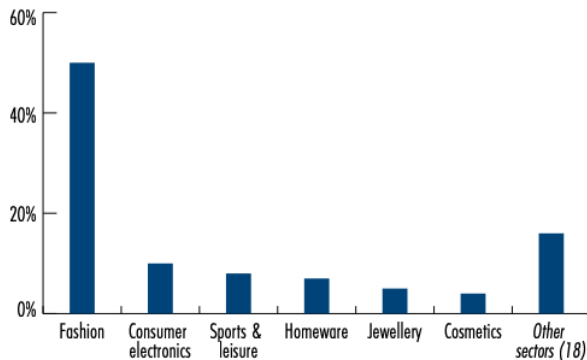
Categories that include at least 25 brands are shown. Note that some companies sell in multiple categories

Source: RetailX

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Figure 3. The primary sectors that Top500 brands belong to

The percentage of Top500 brands in key sectors



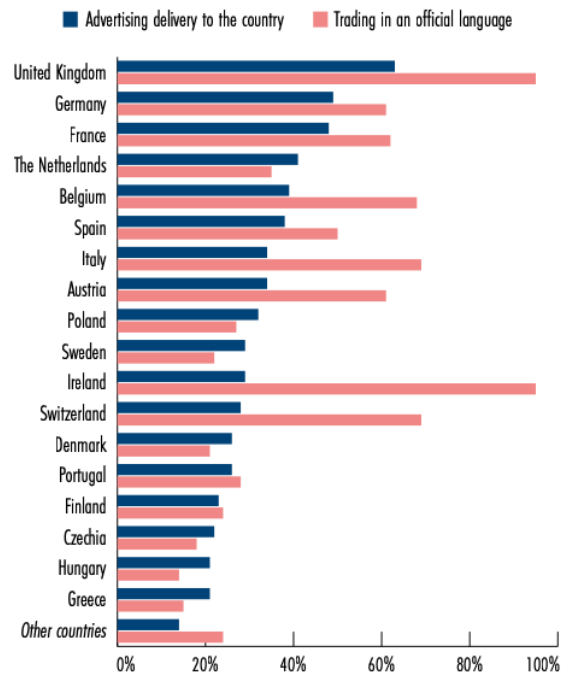
Sectors with more than 4% of the Top500 are shown

Source: RetailX

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Figure 2. How far do Top500 brands localise their websites?

The percentage of Top500 brands that advertise delivery to a region and have a local-language version of their websites



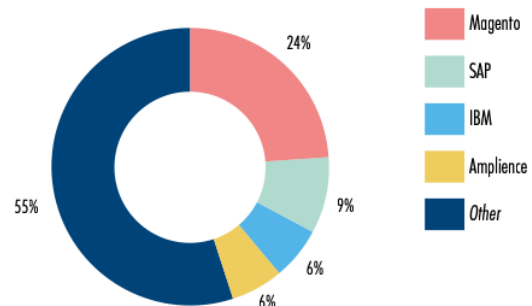
In most European countries, shoppers are unable to shop with most Top500 brands in their local language and are unlikely to see a brand's delivery options advertised for their own country, even if it will deliver to their addresses. This graphic shows only the countries to which more than 20% of the Top500 advertise delivery options.

Source: RetailX

CC BY ND RetailX 2022

Figure 4. Ecommerce platforms used by the Top500

The percentage of Top500 brands that use an ecommerce platform



Source: RetailX

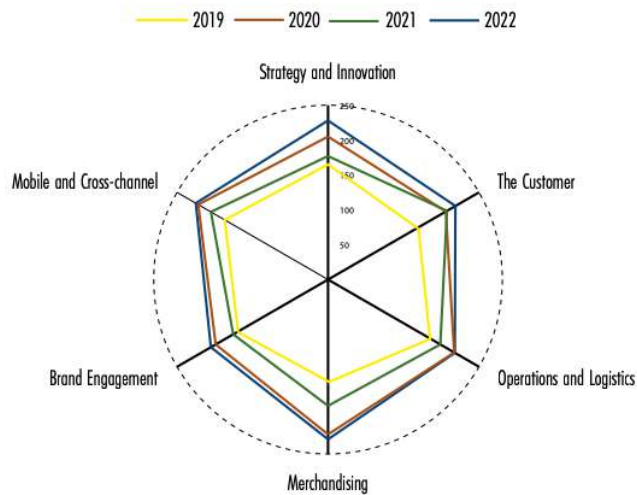
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MEASURING PERFORMANCE

We score performance in tests to create an index value. The Total Index Value (TIV) is the sum of all companies' results while the Average Index Value (AIV) is the average company's result. These figures enable us to compare performance between years, sectors and regions since a higher TIV or AIV represents a greater measured capability and performance. Our benchmarking reveals that performance has markedly improved in most areas in successive years.

Figure 5. Performance by Dimension

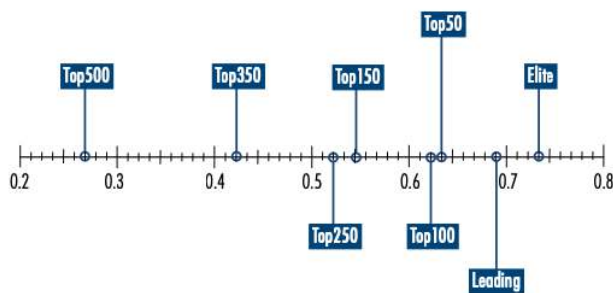
The Total Index Value for each performance Dimension 2019-2022



Source: RetailX

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Figure 7. Average performance, by cluster



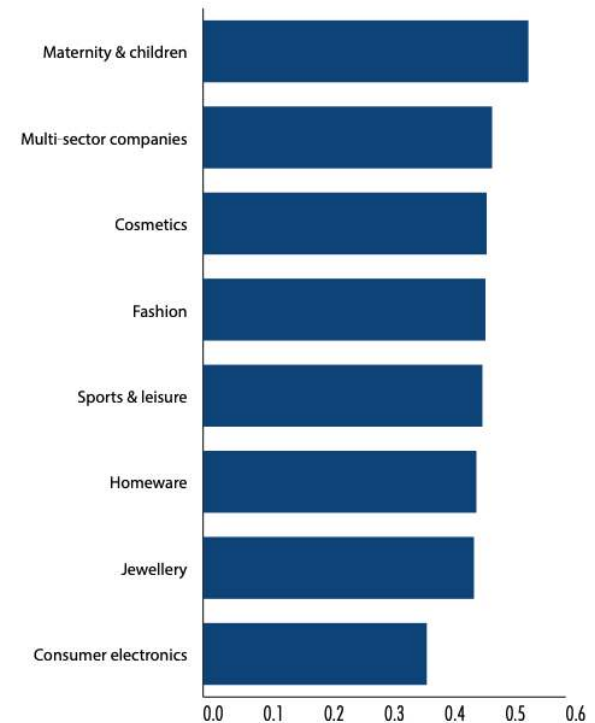
The brands within each cluster are listed on page 10. A brand's cluster is determined both by its Footprint size (calculated from revenues, web traffic and stores) which receives a 30% weighting, and by its performance in the other metrics covered by this report (70% weighting)

Source: RetailX

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Figure 6. Average performance, by sector

The Average Index Value for the largest sectors



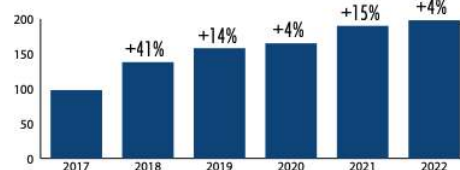
Sectors with 30 or more Top500 brands are shown

Source: RetailX

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Figure 8. Overall Index change

The Total Index Value 2019-2022 and YOY change



Most years show year-on-year growth, reflecting an increase in measured capacity

Source: RetailX

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THE LARGEST 500 DIRECT-SELLING BRANDS

The largest 500 brands in Europe form the Top500 (overleaf) and are here laid out according to how significant they are as B2C retailers to European consumers by web traffic, retail revenue and number of stores

LARGEST 50	LARGEST 100	LARGEST 150	LARGEST 250	LOAF
5.10.15.	& OTHER STORIES	ABERCROMBIE & FITCH	ACNE STUDIOS	LONG TALL SALLY
ADIDAS	ADOBE	ARMANI	AGENT PROVOCATEUR	MAISONS DU MONDE
ADOLFO DOMINGUEZ	ALLSAINTS	ASPINAL OF LONDON	ALDO	MALL
ANN SUMMERS	ASICS	AUTODESK	AMD	MAMAS & PAPAS
APPLE	CALVIN KLEIN	BANG & OLUFSEN	ASUS	MINT VELVET
BERSHKA	COS	BARBOUR	AVERY	MODA IN PELLE
BIMBA Y LOLA	COTSWOLD OUTDOOR	BOUX AVENUE	BAKER ROSS	MOHITO
THE BODY SHOP	CREW CLOTHING COMPANY	BRAVISSIMO	BANANA REPUBLIC	MOLTON BROWN
BOSE	DIESEL	BURBERRY	BERGHAUS	MONICA VINADER
CLAIRE'S	DR. MARTENS	CAMPER	BILLABONG	MULBERRY
CLARKS	DREAMS	CARHARTT	BLANCHEPORTE	MUSTO
FAT FACE	DUNE LONDON	CATH KIDSTON	BOOHOO	MYPROTEIN
FOOT LOCKER	ERNEST JONES	CHARLES TYRWHITT	O BOTICÁRIO	NINTENDO
GANT	FARROW & BALL	COAST	BOTTEGA VENETA	NVIDIA
GAP	FOSSIL	DESIGUAL	BRORA	OBİ
GOOGLE PLAY	G-STAR RAW	DIOR	BUILD-A-BEAR WORKSHOP	OFFSPRING
H&M	HOBBS LONDON	DULUX DECORATOR CENTRES	BURTON (US)	OKA
HOTEL CHOCOLAT	HOLLISTER	ECCO	CCLEANER	ONEPLUS
IKEA	HUGO BOSS	FLANNELS	CHARLES CLINKARD	ORIFLAME
JACK & JONES	JOJO MAMAN BÉBÉ	FRENCH CONNECTION	CHRISTIAN LOUBOUTIN	ORVIS
L'OCCITANE	JOULES	GUCCI	CLINIQUE	PAUL SMITH
LEGO	KAREN MILLEN	HABITAT	CONRAD	PEPE JEANS LONDON
LOUIS VUITTON	LACOSTE	HACKETT	DELL	PHILIPS
LUSH	MONKI	HOTTER	DISNEY	POLAR
MANGO	MOSS BROS.	J. CREW	ELLIS BRIGHAM MOUNTAIN SPORTS	PRETTY GREEN
MARKS & SPENCER	NEPTUNE	JACK WILLS	ELLOS	PRETTYLITTLETHING
MASSIMO DUTTI	NEW BALANCE	JIGSAW	ENGELBERT STRAUSS	RADLEY
MICHAEL KORS	OASIS	KIEHL'S	F.HINDS	RAPHA
MICROSOFT	OLIVER BONAS	KURT GEIGER	FENDI	LA REDOUTE
MOUNTAIN WAREHOUSE	PAVERS	KÄRCHER	FIRE EARTH	ROUTE ONE
NESPRESSO	PHASE EIGHT	LANDS' END	FRED PERRY	SCOTCH & SODA
NEW LOOK	PUMA	MISSGUIDED	GARMIN	SERAPHINE
NIKE	RALPH LAUREN	MONTBLANC	GIGABYTE	SKAGEN
THE NORTH FACE	REISS	MUJI	GUESS	SONY
OMEGA	RESERVED	PRADA	HAWES & CURTIS	STELLA MCCARTNEY
OYSHO	ROBERT DYAS	RAZER	HOME24	TOAST
PANDORA	ROMAN ORIGINALS	RUSSELL & BROMLEY	HORNBY	TOMTOM
PULL&BEAR	SELECT	SEASALT CORNWALL	HP	TRIPP
RIVER ISLAND	SKECHERS	SPACE NK	HUAWEI	UGG
SAMSUNG	SWATCH	SUPREME	HUNKEMÖLLER	UNITED COLORS OF BENETTON
SEPHORA	TED BAKER	SWEATY BETTY	JIMMY CHOO	VERSACE
SHEIN	TIFFANY & CO.	T.M. LEWIN	JONES BOOTMAKER	VIVIENNE WESTWOOD
SHOPDISNEY	TIMBERLAND	THOMAS SABO	JYSK	WEIRDFISH
STRADIVARIUS	TRESPASS	THORNTONS	KATE SPADE	WESTWING
SUPERDRY	UNDER ARMOUR	TRIUMPH	KENZO	XBOX
SWAROVSKI	UTERQÛE	WAREHOUSE	L.K. BENNETT	XIAOMI
TOMMY HILFIGER	VICTORIA'S SECRET	WEEKDAY	LAITHWAITE'S	YUMI
UNIQLO	WARREN JAMES	WHITTARD OF CHELSEA	LENOVO	YVES ROCHER
WHITE STUFF	WHISTLES	YANKEE CANDLE	LEVI'S	
WILKO	YOURS CLOTHING	YVES SAINT LAURENT	LG	
			LIBERTY LONDON	

THE LARGEST 500 DIRECT-SELLING BRANDS

LARGEST 350		LARGEST 500		
ACE & TATE	METRO	ALBA MODA	DEWALT INDUSTRIAL TOOL COMPANY	MONCLER
ACER	MIO	ALPINE PRO	DOLCE & GABBANA	MORGAN
ALEXANDER MCQUEEN	MSI	AMERICAN APPAREL	DORMEO	MS MODE
AMERICAN EAGLE	NESCAFE DOLCE GUSTO	ARMANI EXCHANGE	DSQUARED2	MUD JEANS
AXMINSTER	NETATMO	ARMED	EARLY LEARNING CENTRE	MUEBLES BOOM
BIRKENSTOCK	NETGEAR	ATTRATTIVO	ESTÉE LAUDER	MMVT WATCHES
BORN2BE	OAKLEY	AXEL ARIGATO	EVERLANE	NAPAPIJRI
BOSCH	OLIVER SWEENEY	BA&SH	FITFLOP	NYX PROFESSIONAL MAKEUP
CANON	ON RUNNING	BALENCIAGA	FURLA	OBAÏBI & OKAÏDI
CELESTINO	ONLY	BAREMINERALS	GEMPORIA	OLYMP
CHANEL	PATAGONIA	BATA	GERBEAUD	OLYMPUS
CHRIST	PETER HAHN	BELKIN	GERRY WEBER	ORBEA
CONVERSE	PETIT BATEAU	BELROY	GHD HAIR	PAOLO BOTTICELLI
CORSAIR	PIMKIE	BENEFIT SAN FRANCISCO	GIANNA KAZAKOU	POLTI
CORTE FIEL	PRAKTIKER	BERGERE DE FRANCE	GIVENCHY	PREMIER MAN
CRABTREE & EVELYN	PROMOD	BJÖRN BORG	GRANNGARDEN	PURIFICACION GARCIA
CRUCIAL	RAY-BAN	BOCONCEPT	GUERLAIN	QUIKSILVER
DELONGHI	REEBOK	BODUM	HALLMARK	REFORMATION
DJI	REGATTA OUTDOOR CLOTHING	BOHUS	HANON	REI
DOC MORRIS	RITUALS	BONOBO JEANS	HAPPY SOCKS	RIVER WOODS
DYSON	ROMWE	BOTTEGA VERDE	HARMAN	ROXY
EASTPAK	S.O.LIVER	BRABANTIA	HAVAIANAS	SALSA
EDUSCHO / TCHIBO	SALOMON	BRANDY MELVILLE	HEMTEX	SAI VATORE FERRAGAMO
EPSON	SCOTT SPORTS	BREITLING	HERSCHEL SUPPLY CO	SAMSØE & SAMSØE
FALKE ERGONOMIC SPORT SYSTEM	SKATEDELUXE	BROTHER	HUNTER	SAMSONITE
FASHION NOVA	SMYTHSON	BVLGARI	HUSH	SEASIDE
FERRARI.COM	SONOS	BYTOM	JACADI	SELECTED
FITBIT	SPRINGFIELD	CACHE CACHE	JBC	SHEEGO
FLEUROP	STEELSERIES	CAMIF.FR	JBL	SKINNYDIP
FREE PEOPLE	SUNSPEL	CANADA GOOSE	JENNYFER	SOFOLGY
GABOR	SUPERGA	CARTIER	JOE BROWNS	SPRINGLANE
GEAR4MUSIC.COM	SUUNTO	CHICCO	JURA	STOKKE
GEOX	TEUFEL	CHLOÉ	KIPLING	STONE ISLAND
GLOBUS	TEXAS INSTRUMENTS	CHRISTIANIA GLASMAGASIN	THE KOOPLES	TAG HEUER
GOPRO	TISSOT	CHURCH'S	LA PERLA	TAPE À L'OEIL
GUDRUN SJÖDÉN	TITUS	COACH	LANIDOR	TATUUM
GYMSHARK	UBISOFT	COLUMBIA SPORTSWEAR	LASCANA	TENDENZ
HELLY HANSEN	URBAN INDUSTRY	CRAGHOPPERS	LE COQ SPORTIF	TIGER OF SWEDEN
HERMÈS	VANS	CREATIVE	LINDT	TOI & MOI
HUSQVARNA	VEJA	CROCS	LINKS OF LONDON	TOM TAILOR
IKKS	VERO MODA	CYRILLUS	LIZ EARLE	TOMS
LAMPENWELT	VICTORINOX	CELINE	LOEWE	TOUS
LAURA ASHLEY	WACOM	DBRAND	LONGCHAMP	TUMI
LOGITECH	WE FASHION	DC SHOES	LULULEMON	VAGABOND
LOVISA	WEBER	DEERBERG	MAMMUT	VALENTINO
LUISAVIAROMA	WESTERN DIGITAL	DEEZEE	MANFROTTO	WAHOO FITNESS
LYLE & SCOTT	WITHINGS	DENLEY	MARIMEKKO	WMF
MAC COSMETICS	WITT WEIDEN	DENON	MERRELL	ZADIG & VOLTAIRE
MARC O'POLO	WURTH	DESENIO	MIELE	ZIZZI
MEDION	ZOOT	DEVRED 1902	MOLESKINE	ZWILLING J.A. HENCKELS

THE BRAND INDEX EUROPE TOP500 2022

The largest direct-selling brands in Europe are ranked here according to their performance in Strategy & Innovation, The Customer, Operations & Logistics, Merchandising, Engagement, and Mobile & Cross-channel. Congratulations to this year's Elite retailing brands: Claire's, H&M, L'Occitane, Marks & Spencer and Tripp

ELITE	WHITTARD OF CHELSEA	TOP150	TOP250	IKKS
CLAIRE'S	& OTHER STORIES	ALEXANDER MCQUEEN	5.10.15.	JACK WILLS
H&M	ALLSAINTS	BALENCIAGA	ACNE STUDIOS	JOE BROWNS
L'OCCITANE	ASICS	BOOHOO	AGENT PROVOCATEUR	KÄRCHER
MARKS & SPENCER	AXMINSTER	BOSE	ALDO	KAREN MILLEN
TRIPP	BOUX AVENUE	BRORA	ASPINAL OF LONDON	KATE SPADE
LEADING	BRAVISSIMO	CALVIN KLEIN	AVERY	KIEHL'S
ADIDAS	BURBERRY	CAMPER	BAKER ROSS	KURT GEIGER
APPLE	CHARLES TYRWHITT	CATH KIDSTON	BANANA REPUBLIC	L.K. BENNETT
BERSHKA	CHRIST	CHANEL	BARBOUR	LA PERLA
COTSWOLD OUTDOOR	CLINIQUE	COAST	BATA	LAITHWAITE'S
DUNE LONDON	COS	DREAMS	BERGHAUS	LANDS' END
ERNEST JONES	DIOR	GABOR	BIMBA Y LOLA	LASCANA
JACK & JONES	EARLY LEARNING CENTRE	GAP	BIRKENSTOCK	LENOVO
MANGO	FOOT LOCKER	HP	BOTTEGA VENETA	LOAF
MASSIMO DUTTI	FRENCH CONNECTION	HUAWEI	BUILD-A-BEAR WORKSHOP	LONG TALL SALLY
NEW LOOK	G-STAR RAW	HUNTER	BURTON (US)	LUSH
NIKE	HABITAT	JENNYFER	CARHARTT	LYLE & SCOTT
OASIS	HOBBS LONDON	JIGSAW	CHARLES CLINKARD	MAC COSMETICS
OYSHO	HOTTER	JONES BOOTMAKER	CHURCH'S	MUJI
PHASE EIGHT	HUGO BOSS	LACOSTE	COACH	OBAÏBI & OKAÏDI
ROBERT DYAS	JIMMY CHOO	LAURA ASHLEY	CONRAD	OBI
SEPHORA	JOJO MAMAN BÉBÉ	LEVI'S	CONVERSE	OLIVER SWEENEY
STRADIVARIUS	JYSK	MICHAEL KORS	CRABTREE & EVELYN	ORVIS
SUPERDRY	LEGO	MICROSOFT	CRAGHOPPERS	PATAGONIA
YOURS CLOTHING	LIBERTY LONDON	MINT VELVET	CROCS	PRETTY GREEN
STRADIVARIUS	MAISONS DU MONDE	MONTBLANC	DENLEY	PRETTYLITTLETHING
TOP50	MAMAS & PAPAS	MOSS BROS.	DESENI	RAPHA
ADOLFO DOMINGUEZ	MISSGUIDED	NESPRESSO	DESIGUAL	RAY-BAN
ANN SUMMERS	MOLTON BROWN	OKA	DIESEL	REGATTA OUTDOOR CLOTHING
THE BODY SHOP	MONICA VINADER	PIMKIE	DR. MARTENS	ROMWE
CLARKS	MONKI	PRADA	DULUX DECORATOR CENTRES	RUSSELL & BROMLEY
CREW CLOTHING COMPANY	MOUNTAIN WAREHOUSE	PUMA	ESTÉE LAUDER	SCOTCH & SODA
ELLIS BRIGHAM MOUNTAIN SPORTS	MYPROTEIN	RALPH LAUREN	EVERLANE	SELECT
F.HINDS	NEW BALANCE	REEBOK	FARROW & BALL	SERAPHINE
FAT FACE	THE NORTH FACE	REI	FASHION NOVA	SHEIN
GANT	OLIVER BONAS	RESERVED	FENDI	SKINNYDIP
HOTEL CHOCOLAT	PAUL SMITH	ROUTE ONE	FITFLOP	SUPERGA
HUNKEMÖLLER	PAVERS	S.OLIVER	FLANNELS	SWATCH
IKEA	PHILIPS	SALOMON	FOSSIL	TAPE À L'OEIL
JOULES	RADLEY	SAMSUNG	FREE PEOPLE	TED BAKER
LOUIS VUITTON	SWEATY BETTY	SHEEGO	GEAR4MUSIC.COM	THORNTONS
MODA IN PELLE	T.M. LEWIN	SKECHERS	GEOX	TOM TAILOR
MULBERRY	THOMAS SABO	SWAROVSKI	GIVENCHY	UNITED COLORS OF BENETTON
OFFSPRING	TIMBERLAND	TIFFANY & CO.	GLOBUS	VANS
PANDORA	TOAST	TRIUMPH	GOOGLE PLAY	VICTORIA'S SECRET
PULL&BEAR	TOMMY HILFGER	UGG	GUESS	WARREN JAMES
REISS	TRESPASS	URBAN INDUSTRY	HACKETT	WEEKDAY
RIVER ISLAND	UNDER ARMOUR	WAREHOUSE	HAVAIANAS	YUMI
SEASALT CORNWALL	UNIQLO	WILKO	HAWES & CURTIS	YVES SAINT LAURENT
SHOPDISNEY	WHITE STUFF	YANKEE CANDLE	HOLLISTER	
SPACE NK				
WHISTLES				

THE RETAILX BRAND INDEX TOP500

TOP350	LUISAVIAROMA	TOP500	DSQUARED2	NESCAFE DOLCE GUSTO
ABERCROMBIE & FITCH	MEDION	ACE & TATE	EASTPAK	NETATMO
ACER	MIELE	ALBA MODA	ENGELBERT STRAUSS	NETGEAR
ADOBE	MIO	ALPINE PRO	EPSON	NVIDIA
AMERICAN EAGLE	MOHITO	AMD	FALKE ERGONOMIC SPORT SYSTEM	OLYMP
ARMANI	MS MODE	AMERICAN APPAREL	FLEUROP	OLYMPUS
ASUS	MUSTO	ARMANI EXCHANGE	FURLA	ON RUNNING
BAREMINERALS	NINTENDO	ARMED	GERBEAUD	ORIFLAME
BERGÈRE DE FRANCE	NYX PROFESSIONAL MAKEUP	ATTRATTIVO	GERRY WEBER	PAOLO BOTTICELLI
BILLABONG	OAKLEY	AUTODESK	GIANNA KAZAKOU	PETIT BATEAU
BLANCHEPORTE	OMEGA	AXEL ARIGATO	GIGABYTE	POLAR
BODUM	ONEPLUS	BA&SH	GRANNGARDEN	POLTI
BRANDY MELVILLE	ONLY	BANG & OLUFSEN	GU DRUN SJÖDÉN	PURIFICACION GARCIA
BREITLING	ORBEA	BELKIN	GUERLAIN	RIVER WOODS
CACHE CACHE	PEPE JEANS LONDON	BELLROY	HALLMARK	ROXY
CAMIF.FR	PETER HAHN	BENEFIT SAN FRANCISCO	HANON	SALSA
CANON	PRAKTIKER	BJÖRN BORG	HAPPY SOCKS	SALVATORE FERRAGAMO
CHRISTIAN LOUBOUTIN	PREMIER MAN	BOCONCEPT	HARMAN	SAMSØE & SAMSØE
COLUMBIA SPORTSWEAR	PROMOD	BOHUS	HELLY HANSEN	SCOTT SPORTS
CRUCIAL	QUIKSILVER	BONOBOS JEANS	HEMTEX	SEASIDE
DBRAND	RAZER	BORN2BE	HUSQVARNA	SELECTED
DEERBERG	LA REDOUTE	BOSCH	JBL	SKATEDELUXE
DEEZEE	REFORMATION	O BOTICÁRIO	JURA	SONOS
DEVRED 1902	RITUALS	BOTTEGA VERDE	KIPLING	SONY
DYSON	ROMAN ORIGINALS	BRABANTIA	THE KOOPLES	SPRINGLANE
ECCO	SAMSONITE	BROTHER	LAMPENWELT	STEELSERIES
EDUSCHO / TCHIBO	SKAGEN	BVLGARI	LANIDOR	STOKKE
ELLOS	SMYTHSON	BYTOM	LE COQ SPORTIF	STONE ISLAND
FERRARI.COM	SOFOLGY	CANADA GOOSE	LG	TAG HEUER
FIRED EARTH	SPRINGFIELD	CARTIER	LINDT	TATUUM
FITBIT	STELLA MCCARTNEY	CLEANER	LOGITECH	TENDENZ
FRED PERRY	SUNSPEL	CELESTINO	LONGCHAMP	TEXAS INSTRUMENTS
GARMIN	SUPREME	CELINE	LOWEPRO	TIGER OF SWEDEN
GEMPORIA	SUUNTO	CHICCO	LULULEMON	TISSOT
GHD HAIR	TEUFEL	CHLOE	MALL	TOI & MOI
GOPRO	TITUS	CHRISTIANIA GLASMAGASIN	MAMMUT	TOMS
GUCCI	TOUS	CORSAIR	MANFROTTO	TOMTOM
GYMSHARK	TUMI	CORTE FIEL	MARC O'POLO	UBISOFT
HERMÈS	UTERQÜE	CREATIVE	MARIMEKKO	VAGABOND
HERSCHEL SUPPLY CO	VERO MODA	CYRILLUS	MERRELL	VALENTINO
HOME24	VERSACE	DC SHOES	METRO	VEJA
HORNBY	VICTORINOX	DELL	MOLESKINE	WACOM
HUSH	VIVIENNE WESTWOOD	DELONGHI	MONCLER	WAHOO FITNESS
J. CREW	WE FASHION	DENON	MORGAN	WEBER
JACADI	WEIRDFISH	DEWALT INDUSTRIAL TOOL COMPANY	MSI	WESTERN DIGITAL
JBC	WITT WEIDEN	DJI	MUD JEANS	WESTWING
KENZO	WMF	DOCMORRIS	MUEBLES BOOM	WITHINGS
LINKS OF LONDON	XIAOMI	DOLCE & GABBANA	MVMT WATCHES	WURTH
LIZ EARLE	YVES ROCHER	DORMEO	NAPAPIJRI	XBOX
LOEWE	ZOOT		NEPTUNE	ZADIG & VOLTAIRE
LOVISA				ZIZZI
				ZWILLING J.A. HENCKELS



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BE THERE FOR CUSTOMERS

Lindsey, McEwan, SVP and GM, EMEA, at Tealium, considers how brands can approach developing relationships with customers



LINDSAY MCEWAN, VP EMEA

The way brands serve customers has changed hugely over the past two years. Shoppers who already trusted brands to provide the products they love are now more inclined to trust that they will also get those products to them in a timely manner. Leading brands have, as a result, seen their direct-to-consumer sales grow quickly in recent years – and are now developing their strategies around that change in buying habits. Brands have always worked hard to raise awareness of their values and products but now, they are also working to develop direct customer relationships with them. By serving their shoppers directly, brands are gaining valuable data that enables them to understand who their customers are, as well as how and what they want to buy.

ENGAGE WITH SHOPPERS WHERE THEY ARE

Brands are following smartphone-wielding shoppers to the places where they now spend more of their time by selling on marketplaces and developing their social strategies. We can see from Brand Index research that most brands now share links to their social media pages and enable visitors to subscribe to their newsletter from their landing pages, making it easy for customers to engage with their favourite brands on the platforms they use.

BUILD TRUST ACROSS CHANNELS

Digital has enabled retail to rebuild itself in recent years around the ways that shoppers want to buy, which means staying relevant to individuals' preferences. Personalised messages delivered by mobile can help to encourage shoppers into their nearest store for that special event or promotional offer. Showing stock availability across channels can also help to reassure brand fans that when they get to the shop, they will be able to buy the item they have in mind.

By working with retailer partners through their own stores, brands can be sure they can get their messages out as widely as possible – both to customers who already know them and those who are yet to discover them.

GETTING TO KNOW THEM

As brands develop their direct-to-customer strategies, they'll want to engage with shoppers over the longer-term. Understanding how shoppers want to buy helps to build insights into buying patterns. Do your customers buy at a particular time of the year, or the month? Are they planning a project? Could regular updates meet their needs? Do they want to subscribe to a service for regular deliveries?

Once brands understand an individual shopper's behaviour, they can keep in touch just as often as the customer prefers in order to ensure that the brand stays relevant to how and when they'll want to buy. By sending personalised offers, brands can promise value to their most loyal customers in a way that may well enable them to continue buying in difficult times.

SHARED VALUES

Customers are now more likely to opt for brands that reflect their values in areas from design and cost to sustainability and animal welfare. Brands can better understand what their customers' priorities are when they have a single view of each customer that shows where, when, how and why they prefer to buy. ■

ABOUT TEALIUM



Tealium's customer data platform enables marketers to create composite 360-degree customer profiles in real time, drive more profitable and relevant omnichannel interactions, and fuel the performance of the business intelligence and data warehouse projects using the richest source of first-party data available.

For more information, visit www.tealium.com

CHANGING BRAND STRATEGIES

Brands are currently rethinking their priorities in light of ever-changing customer demands, writes Chloe Rigby

Brands selling to European shoppers already radically redefined the way they sell during the Covid-19 pandemic. Yet new challenges continue to emerge that have affected both European and global markets, from continuing Covid-19 outbreaks to the Russian invasion of Ukraine that is also exacerbating living costs, supply chain issues and concerns about sustainability. All these require brands to come up with new answers at a time when the ways that shoppers buy is already changing fast.

NEW CHALLENGES

European markets are moving on from local Covid-19 lockdowns and trading restrictions but are still affected by outbreaks elsewhere in the world. In China, Shanghai is, at the time of writing, going through a lockdown that has hit the region's manufacturing and is likely to result in product shortages across the global supply chain.

At the same time, Russia's invasion of Ukraine has direct consequences for the brands who previously sold in the two countries. It's also widely affecting the cost of living crisis already being felt across Europe as the prices of energy and raw materials rise due to markets limiting their use of Russian oil and gas.

One piece of research, from Zappi^[1], suggests that shoppers do not want the brands they buy from to support the Russian market. 55% of UK respondents and 43% of those in the US went further by saying that brands had a responsibility to rally against injustice.

In the early days of the invasion, *Vogue Ukraine* took a lead in calling on brands to take a stand and speak out against the war. Brands have responded by speaking out in support of the Ukrainian people and also by suspending their operations in Russia and its ally, Belarus. From luxury houses such as LVMH and Richemont to IKEA and H&M, many brands quickly closed their Russian shops and donated money to Ukraine relief efforts. Figure 10 shows what that has meant in practice for retail and other brands.

While some brands have closed their shops within Russia, others have stopped selling online to the market. All this comes at a cost to brands, who will also be concerned about how rising inflation is likely to affect their customers' spending power. UK fashion and homewares brands Next has said the war will reduce its full-year revenues by about £65m and its profits by £18m, while fast fashion business Asos said that Russia and Ukraine represented about 4% of group sales in 2021 and contributed about £20m to group profit.



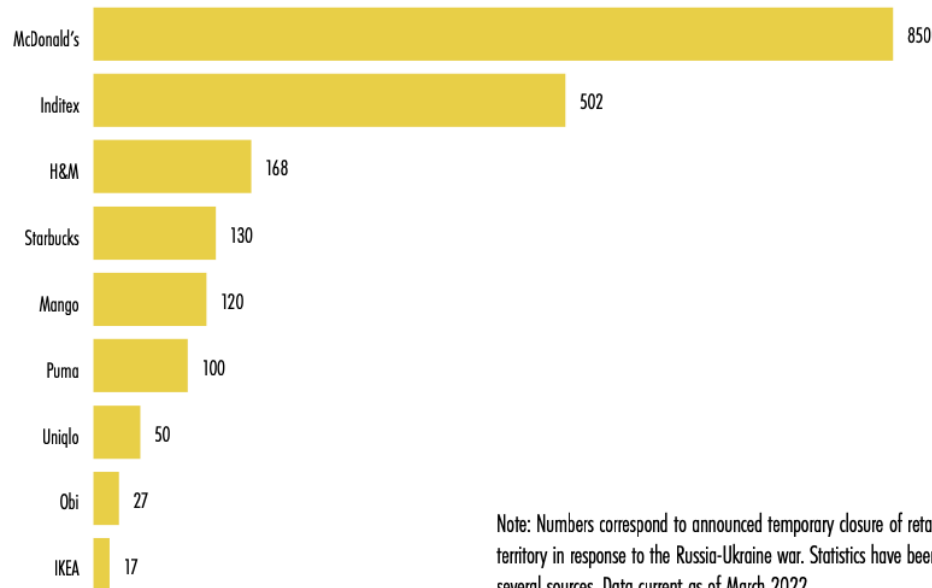
This H&M store in St Petersburg, Russia, closed following the outbreak of war in Ukraine

SHIFT DIRECT TO CONSUMERS

At the same time, brands are seeing fresh opportunities as more shoppers choose to buy directly from them than before the pandemic. Although European shopping habits seem to be returning closer to pre-pandemic patterns, with a refreshed willingness to buy in-store, for many brands, the value of the sales they make direct to shoppers remains much higher than it was before. Nike, for example, reported that 45% of its third-quarter Nike-brand sales were made direct to shoppers. During the three months to 28 February 2022, its direct-to-consumer sales grew by 15%, including a 14% rise in its own stores and 19% online growth – an effect seen both in its US and European markets. Nike Inc president and chief executive, John Donahoe, said at the time that the figures showed the success of its 'consumer direct acceleration' strategy.

"Fuelled by deep consumer connections, compelling product innovation and an expanding digital advantage, we have the right playbook to navigate volatility and create value through our relentless drive to serve the future of sport," he said. Similarly, brands from Under Armour to Burberry have been building their online audiences in recent years.

Simon Wolfson, chief executive of the UK Next fashion and homewares brand, said, as he unveiled full-year figures in March, that the future shape of retail has become clearer through the challenges of the pandemic. Now, he says, shoppers have an

Figure 9. Number of stores closed in Russia due to the 2022 war in Ukraine, by brand

Note: Numbers correspond to announced temporary closure of retail stores on Russian territory in response to the Russia-Ukraine war. Statistics have been compiled from several sources. Data current as of March 2022.

Source: The Guardian, Newsweek Daily Beast Company, The News 24, Reuters, ABC, Bank of America, CNBC, Business Insider, Various sources (company data), Statista. Accessed via Statista

CC BY ND RetailX 2022

abundance of choice and it's never been easier for brands to launch or to reach new customers. "A world in which new brands can rapidly gain scale presents a threat to large, well established brands like Next," says Wolfson. "Particularly those, like us, who have grown market share through building a large store network. But the possibilities of the internet age present the group with far more opportunities than threats. Next product ranges, liberated from the constraints of finite retail space, can offer far more choice to our customers. And if new and developing brands are going to gain scale at pace, we can enable that process through our own online aggregation business." The internet, he notes, has also enabled the business to break into new markets and challenge incumbents.

The retailer is one of many taking the path towards online aggregation. Another example is German fashion business, Zalando, which has over 5,800 brands selling in 23 markets via its ecommerce platform, along with 7,000 platform-connected shops able to offer multichannel services. In 2021, these partners and connected retailers accounted for 30% of GMV (gross merchandise volume) of €14.3bn. The company aims to increase that to more than €30bn by 2025.

SUSTAINABILITY MATTERS

Just as customers believe that the brands they buy from should be vocal about the war in Ukraine, they also expect brands to follow their values in other areas and sustainability is another key area in which European customers are now keen for action. Levi Strauss chief executive, Chip Bergh, speaking at the World Retail Congress in Rome earlier this year, said that sustainability is fast becoming "a strategic issue that affects everything the brand does, everything we do. We drive our innovation programme around sustainability."

In practice, this means using more sustainable fibres, such as hemp, in its denim products, as well as finding ways to reduce water usage and reducing its overall environmental footprint.

THE SHIFT IS LED BY ITS CUSTOMERS.

"Sustainability used to be pretty niche from a consumer standpoint and very Europe-centric," said Bergh. "Now it's truly global and cuts across generations. The young consumer, in particular, is really focused on this. If you ask a teenager today, they will very likely say climate change is top of mind in terms of their concerns."

Zalando, meanwhile, is following circular design principles and asking the 5,800 brands that sell on its platform to do the same. "If products are made to be more durable, they can better support circular business models — such as clothing rental and preowned assortments — which rely on garments lasting through multiple uses and users," says Laura Coppen, head of circularity at Zalando, in a blog^[2] on the Zalando site.

Both in sustainability and in the Russia Ukraine war, brand customers are increasingly setting the tone for the brands they buy from. It's likely their voices will continue to make themselves heard in the years that lie ahead. ■

[1] <https://internetretailing.net/international/international/growing-numbers-of-consumers-call-on-brands-to-take-a-stand-for-ukraine-24543>

[2] <https://corporate.zalando.com/en/newsroom/news-stories/zalando-roll-out-circularfashions-circular-design-criteria-brands>

BUILDING BRAND LOYALTY

From engaging on social media to quickly meeting their expectations, brands are finding new ways to get close to their customers

The relationship that brands have with their customers is coming into new focus as customers raise their expectations of those that they buy from. Just as shoppers are now using digital commerce to buy directly from brands, so they can also use digital channels to let brands know what they think.

UK discount retailer The Works made it clear earlier this year that its customers are seeking a brand relationship. "It is becoming increasingly apparent that consumers today don't just want to buy a product, they want to buy into a brand with a clear purpose," said The Works chief executive, Gavin Peck, in its half-year report. "We have been working hard to clarify our purpose and be more than just a retailer. For The Works, this means inspiring our customers by showing them what they can 'do' – read learn, create and play – and inspiring them to do it."

In keeping with this, The Works aims to be a "better, not just bigger version of ourselves" as it invests across channels. Peck says, "We are focused on fulfilling our new purpose, improving our customer proposition, creating deeper relationships with our customers and driving increased brand loyalty."

So what does RetailX research say about how leading brands are communicating with customers and building brand loyalty?

ENGAGING WITH CUSTOMERS

RetailX research finds that most brands now guide shoppers to their social media presences from their landing page (89%) or invite shoppers to sign up for their newsletter (76% rising to 84% among sports and leisure brands). By doing so, they are potentially building engagement, since shoppers who follow a brand on social media will be likely to see their posts regularly and may take up offers.

Many startups turn to social media at launch, with 33% launching through Instagram and 21% through Facebook in the last two years, according to recent research of 2,300 UK entrepreneurs from the British Business Excellence Awards. Twitter (18%), TikTok (9%) and LinkedIn (4%) also saw a share of startup interest. Those who chose to do so via Instagram said they did so for its reach (87%), flexibility (72%) and engagement rates (58%). Instagram has said that tools such as polls and quizzes – liked by 57% of users in its own research – can be useful and boost engagement.



L'Oréal UK & Ireland
L'Oréal is now working with TikTok creators to tap into the appetite for products that go viral on social media

Social media is also important to global brands. L'Oréal UK and Ireland recently worked with TikTok to tap into the appetite on the social media platform for products that go viral. It says interest in some of its recent product launches has taken off through the #TikTokMadeMeBuyIt hashtag – which has itself had more than 10bn views on the platform. It is also working with TikTok creators to sell gift boxes via the TikTok shop.

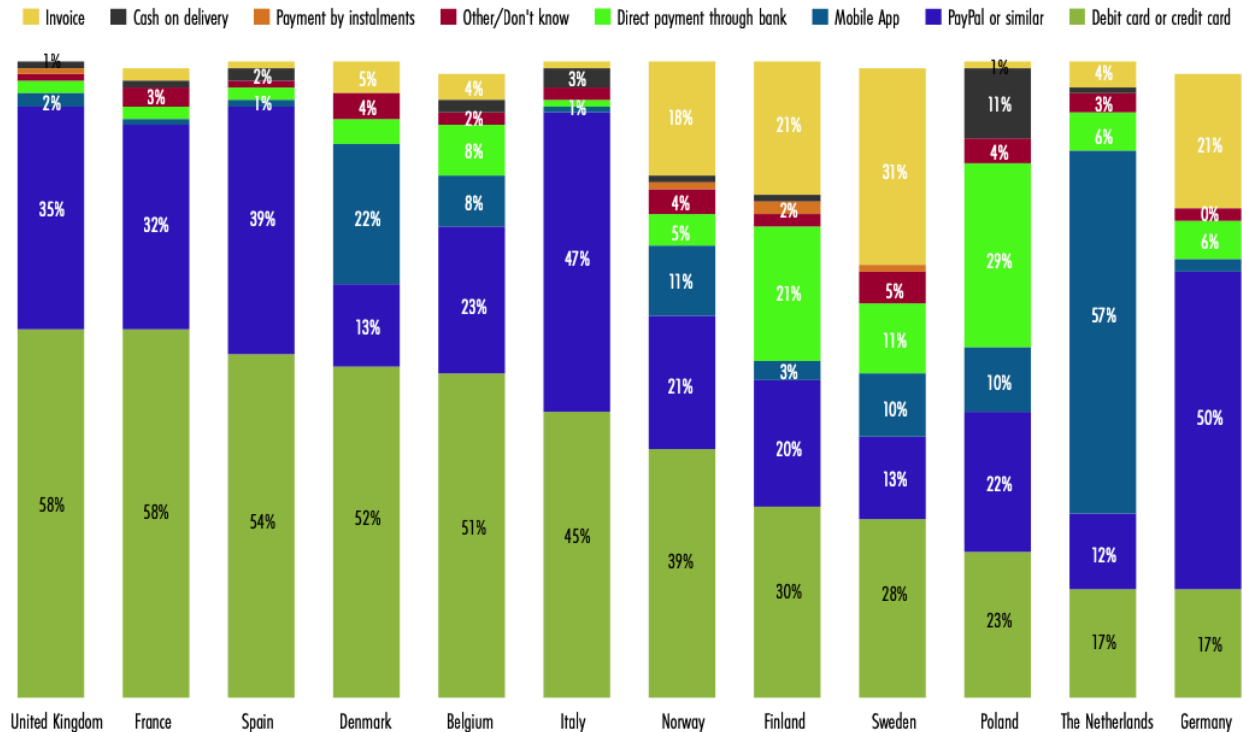
"Our partnership with TikTok enables us to continue to invent and reinvent the ecommerce experience," says Lex Bradshaw-Zanger, chief marketing officer of L'Oréal UK and Ireland. "Where much of ecommerce today has been a very functional experience and driven by more rational shopper missions like replenishment, TikTokMadeMeBuyIt has brought the excitement of product discovery in partnership with creators to a full funnel online experience."

L'Oréal launched its collaboration with a week-long festival of live beauty events featuring creators. In all, more than 100 hours of live content were scheduled to take place during the week.

KEEPING SHOPPERS INFORMED

Engaging is also about communicating products clearly, which means featuring plenty of product images as well as providing clear information about how a product works and what it does. 60% of leading brands show customers a choice of product images, while

Figure 10. Payment preferences in Europe, 2021



Note: Online survey conducted in 2020 and 2021

Results include 12,000 interviews with ecommerce consumers in Belgium, Denmark, Finland, France, Germany, Italy, the Netherlands, Norway, Poland, Spain, Sweden and the UK.

The interviews were conducted with representative nationwide samples of private individuals aged 15–79 years. The number of respondents varies around 1,000 between the countries.

Source: PostNord

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65% show zoomable images on their mobile websites. 82% of sports and leisure brands do so, along with 71% of fashion brands, who clearly see the importance of providing detail to their customers (see Merchandising Dimension, page 24 for more).

RetailX researchers score brands' product information on a scale of zero to four, with the median brand rated relatively highly on this metric, at three. Top500 brands selling consumer electronics (3.57) and cosmetics (3.45) and to the UK (3.15) tend to score higher, while those selling fashion clothing and accessories (3.17) and to Iceland (2.75) and Malta (2.86) are at the other end of the scale.

Keeping shoppers informed also includes letting customers know what other customers thought of a product. Product reviews and ratings are each shared by 44% of brands, while a small proportion (3%) allow shoppers to add their own images to their reviews.

MEETING CUSTOMERS' EXPECTATIONS

Building relationships goes beyond communicating via channels such as social media – it's also about giving shoppers a choice of ways to get in touch. According to RetailX research, brands can stand out by being among the 3% of leading brands that now offer live chat within a minute of users landing on their website.

Enabling local payment options and relevant languages is important. The chart above shows the payment options that shoppers expect to use when buying online from different markets. Almost a third (32%) of leading brands show shoppers the payment options that they offer on their site from the landing page, although this has declined by three percentage points (3pp) since last year. More show fulfilment options on the product page (69%) and/or the landing page (40%).

RetailX research also shows how brands enable shoppers to tailor a brand website to meet their needs. Almost two-thirds (64%) enable shoppers to choose the country from which they want to view the site – thus showing them the local language, currency and delivery options. Consumer electronics brands are the most likely to offer this option, with 92% doing so. 15% of brands enable shoppers to choose their preferred currency, while 22% enable them to choose the language they'd like to read it in. (See the Strategy & Innovation Dimension, page 18 for more detail). ■

HOW BRANDS ARE ADAPTING TO CUSTOMER DEMAND

Those that stand out in the Strategy & Innovation Dimension are more likely to localise their website

The Strategy & Innovation Dimension is the part of the Brand Index research that changes most regularly. Each year, RetailX researchers choose the metrics they judge to be central to a market-leading ecommerce and multichannel strategy, or at the cutting edge of best practice in the sector. This year, more than two dozen metrics, from serving customers across European markets to delivery, collection and returns, feature in this Dimension.

The most significant findings are grouped below through three questions: how do brands localise their websites for European shoppers? How do they keep shoppers informed? What fast delivery promises do they make?

HOW DO BRANDS LOCALISE THEIR WEBSITES FOR EUROPEAN SHOPPERS?

When customers can shop online in their own language and the currency, retailers make it easier for them to buy.

Country selector

Most brands (+1pp to 64%) offer shoppers the option of choosing the country to which they'd like to have their orders delivered. This strategy enables shoppers to see the site in their local language and currency and with local delivery promises. Those most likely to offer this option include brands selling consumer electronics (92%) and sports and leisure clothing and equipment (74%), while the least likely to include cosmetics (42%), jewellery and homeware brands (both 58%). Shoppers buying from Norway, Ireland, Luxembourg, Lithuania and Latvia (all 85%) are among the most likely to be able to use them.

Currency selector

15% of brands now enable shoppers to choose the currency they'd prefer to pay in on their website, following a 5pp uptake since the previous year. Brands selling sports and leisure clothing and equipment (24%) and fashion clothing and accessories (21%) are

more likely to offer a currency selector, while those selling consumer electronics (4%) and homewares (8%) are least likely. 17% of UK brands offer a currency selector, in contrast with those selling in France and Sweden (both 8%), Lithuania (3%) and Bulgaria, Poland, Slovakia and Portugal (all 4%). Uptake increased most significantly in the Netherlands (+3pp to 5%) and Ireland (+3pp to 5%).

Language selector

Just over a fifth (+4pp to 22%) of sites enable customers to choose the language that they'd like to read it in. Brands selling consumer electronics (30%), sports and leisure clothing and equipment (25%) and fashion clothing and accessories (24%) are most likely to offer a choice of languages. Those selling cosmetics (6%) and homewares (13%) are least likely to do so. Brands selling to Luxembourg (49%), Cyprus (45%) and Estonia (44%) are more likely to do so than those selling to Iceland (15%) or the UK (27%).

HOW DO BRANDS KEEP SHOPPERS INFORMED?

Showing delivery and payment options up front enables shoppers to make informed decisions about whether to continue shopping.

Fulfilment options on the landing page

Fewer brands now show fulfilment options on the landing page (-9pp to 40% of 303 brands assessed on this metric both this year and last). Those that are more likely to include brands selling maternity and children's goods (47%), sports and leisure clothing and equipment (45%) and cosmetics (44%). Brands selling to Estonia (45%) and Belgium (44%) are more likely to do this.

Fulfilment options on the product page

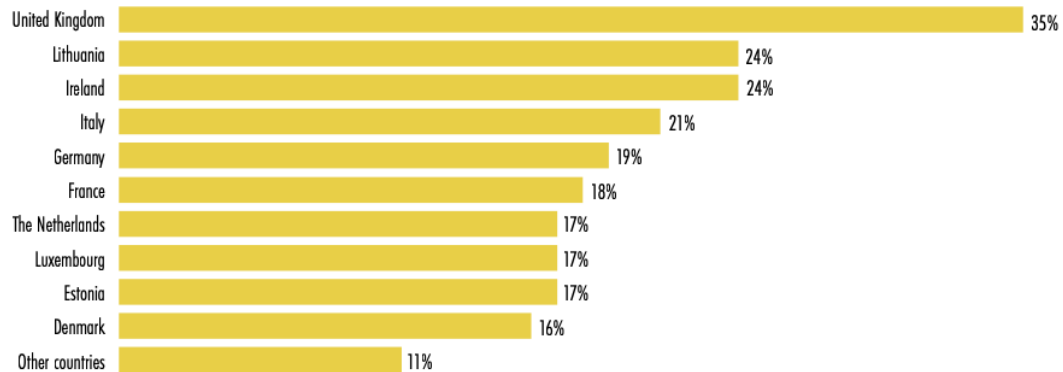
Brands are more likely to show fulfilment options on the product page than the landing page, with 69% (-3pp) of 303 brands assessed on this metric this year and last doing so in 2022. Brands selling

The leading brands in the Strategy & Innovation Dimension

APPLE	COTSWOLD OUTDOOR	MANGO	NIKE	ROBERT DYAS
BERSHKA	CREW CLOTHING COMPANY	MARKS & SPENCER	OLIVER BONAS	SHOPDISNEY
BOUX AVENUE	GANT	MASSIMO DUTTI	OYSHO	STRADIVARIUS
BURBERRY	H&M	MULBERRY	PULL&BEAR	SUPERDRY
CLAIRE'S	L'OCCITANE	NEW LOOK	RIVER ISLAND	YOURS CLOTHING

Figure 11. Next-day delivery, by country

The countries where Top500 brands are most likely to offer next-day delivery



Note: 'Other countries' shows the average value of the 22 countries not individually shown

Source: RetailX

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fashion clothing and accessories (75%) and maternity and children's products (66%) are more likely to show fulfilment options here, as are those selling to Croatia (77%) and Cyprus (75%).

Payment options on landing page

Fewer brands show payment options on the landing page, following a 3pp decline to 32% of 303 brands assessed on this metric this year and last. Sites selling maternity and children's products (37%), homewares (32%) and fashion clothing and accessories (31%) are more likely to do this. Shoppers are more likely to see payment options on the landing page when they buy from the Netherlands (38%), Germany (37%; +2pp) and Switzerland (36%; +2pp).

WHAT DELIVERY PROMISES DO BRANDS MAKE?

Premium delivery and collection options enable shoppers to get their goods fast and at specific times.

Next-day delivery

The availability of next-day delivery has fallen by 9pp to 33% since last year, among the 419 brands assessed on this metric both this year and last. Shoppers buying cosmetics (59%), maternity and children's products (53%) and fashion clothing and accessories (43%) are more likely to be able to order for next-day delivery than those buying consumer electronics (18%) and jewellery (26%). Shoppers in the UK are the most likely to receive their orders next-day (35%) but this is well below last year following a 10pp decline. Brands selling to Lithuania (24%, -3pp) and Ireland (24%, +8pp) are also among the most likely to offer next-day delivery.

Nominated-day delivery

6% of brands now offer nominated-day delivery, having fallen by 1pp from 7% last year. Brands that are most likely to offer sell cosmetics (14%), homewares (14%) and maternity and children's products (9%). At the other end of the scale, 5% of both sports

and leisure clothing and equipment and fashion clothing and accessories now enable shoppers to name their day of delivery. This service is slightly more available in the UK (6%) and Ireland (5%) than in other markets. Less than 1% of those shopping from Malta, Liechtenstein, Cyprus, Slovenia and Bulgaria offer this. Availability increased, slightly in Germany (+1pp to 3%) but stayed the same or fell in all other markets. Only 1% of brands now offer nominated-time delivery, down 1pp decline among the 352 retailers assessed on this metric this year and last. It's most likely to be available from brands selling homewares (5%) and maternity and children's products (3%).

Saturday delivery

Fewer brands now deliver on a Saturday (-3pp to 14%). Those that are more likely to do so include brands selling cosmetics (38%) and maternity and children's products (31%), while shoppers buying consumer electronics (4%), jewellery or sports and leisure clothing and equipment (both 9%) are least likely to be able to choose Saturday delivery. Saturday delivery is most available in the UK (15%), Ireland (6%) and the Netherlands (5%) but is generally not available in Malta, Latvia, Lithuania, Liechtenstein or Iceland (all less than 1%) from Top500 brands. The fastest decline in the service was in the UK (-3pp) while there were increases in Slovenia and Romania (both +3pp to 3%).

Sunday delivery

Shoppers are even less likely to be able to get Sunday delivery from leading brands (-1pp to 5%). Those most likely to are those buying maternity and children's products (16%), with cosmetics and homewares brands the least likely. Sunday delivery is most available from brands in the UK (5%), despite a 2pp decline since last year. It is mostly unavailable in markets including Slovenia, Romania, Portugal, Norway and Malta (all less than 1%). There were small increases in use in Germany, Sweden and the Netherlands but this was from a very low base (all 1pp to 1%). ■

THE CUSTOMER EXPERIENCE

Brands that deal with customer emails quickly and offer shoppers a range of ways to get in touch stand out in The Customer Dimension

The brand customer experience is put to the test in The Customer Dimension of the RetailX Brand Index. Researchers explore that experience through more than a dozen metrics chosen to represent the customer's point of view, from the way that customer service issues are dealt with to the length of the returns period. They find that shoppers buying from Top500 brands now have longer to return an item but that services are generally operating more slowly and offering somewhat less convenient services. For example, emails are now replied to more slowly, while live chat is less available. This is likely to be an effect of the fast expansion of online shopping during Covid-19, at the same time as rising sickness rates among staff.

Research findings are grouped below through three questions: How easy is it for shoppers to contact brands? How convenient is customer service? How easy is it for shoppers to find out about a product?

HOW EASY IS IT FOR SHOPPERS TO CONTACT BRANDS?

Brands now offer a slower and less convenient service, when measured through email responses and the availability of live chat.

By email

RetailX researchers sent an email with a query to Top500 brands selling in Spain, France, the UK and Germany, and rated the response out of four. The average score was 3.4 – down 0.2 from last year. The median score remained at 4.

Cosmetics (average of 3.71) and homewares (3.62) brands tended to score better than maternity and children's brands (3.12) and jewellery brands (3.14). The highest-rated responses were to shoppers getting in touch from Spain (average of 3.67) and France (3.52). The lowest-rated were those made to shoppers getting in touch from the UK (3.36) and Germany (3.25). Performance declined in all four markets studied compared to previous years.

Service was rated at an average 3.55 and a median of 4, with the highest scores won by brands selling sports and leisure clothing and equipment (3.69) and fashion clothing and accessories (3.58). The lowest scores were for maternity and children's brands (3.23). Service was also rated more highly in Spain (3.7) and France (3.5).

Brands replied to customer service emails in an average of 26.8 hours, which is 334 minutes slower than last year. The median brand responded in 20.3 hours – 348 minutes slower than last time. The fastest replies were from cosmetics brands (20.5 hours) and fashion clothing and accessories brands (median 18.3 hours), the slowest from jewellery (median 28.5 hours).

By live chat

Fewer brands now offer their customers live chat (-8pp to 3%) within a minute of landing on a website. Those most likely to do so include brands selling cosmetics (8%) and fashion clothing and accessories shops (3%). Only 1% of maternity and children's products brands and 2% of consumer electronics shops do so. It's most available to brands selling in Lithuania (10%) and Slovakia (9%) and least available in the UK (-8pp to 3%) and Germany (-2pp to 3%).

HOW CONVENIENT IS CUSTOMER SERVICE?

While shoppers now have longer to return an item, they are less likely to be able to use one-click ordering.

Returns periods

In both the EU and the UK, shoppers have a legal minimum of two weeks to return an unwanted online order. However, longer returns periods are now commonly offered in the wake of the pandemic.

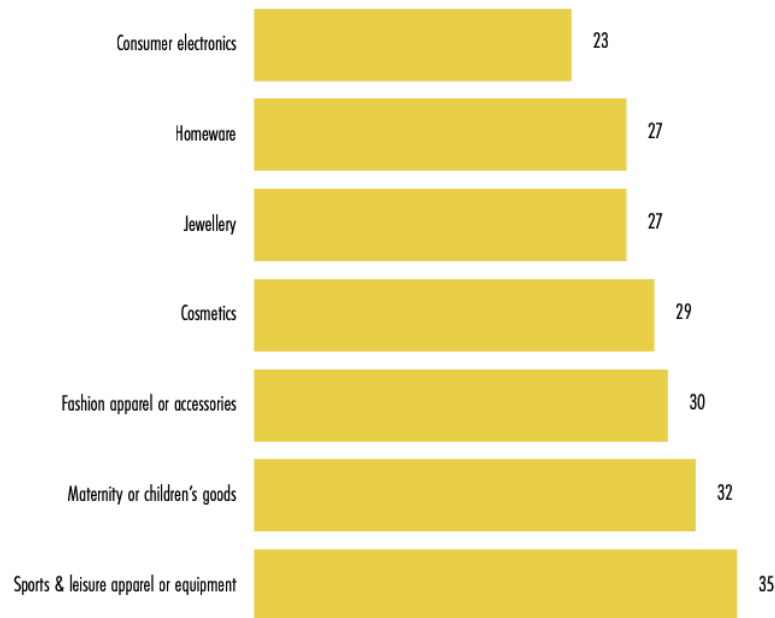
In practice, leading European brands now offer an average of 95.2 days, or around three months. That's 41.8 days longer than the previous year, representing a near doubling of the period. The median – or halfway point – retailer offers 29 days – a day longer than last year. Brands selling sports and leisure clothing and equipment (34.9 days) and maternity and children's products (31.7 days) offer the longest median returns periods, while those selling consumer electronics offer the shortest (22.5 days). Returns periods lengthened across most markets. The median brand selling to Finland gave shoppers the most generous extension – six more days than last year to return an item – to 30 days. Only in Luxembourg did returns periods decrease, by three days to 27.

One-click ordering

The use of one-click ordering has declined over the last year

Figure 12. How long do brands give shoppers to return an unwanted item?

The median return policy length in days of Top500 brands in each sector



Source: RetailX

CC BY ND RetailX 2022

(-6pp to 17%), with those selling fashion clothing and accessories (17%) and sports and leisure apparel or equipment and cosmetics (15%) using this to a greater extent than those selling consumer electronics (8%) and maternity or children's products (9%). One-click ordering is more likely to be available among Top500 brands selling in Spain (19%), Croatia and Luxembourg (both 18%). It's slightly less available in Norway (12%), Germany and Sweden (both 13%). Use declined most sharply in the UK (-6pp to 18%), while no regions showed an increase.

HOW EASY IS IT FOR SHOPPERS TO FIND OUT ABOUT A PRODUCT?

Brands are now less likely to offer reviews and ratings than in 2021.

Product reviews

44% of brands now share product reviews with customers, following a 5pp decline from 49% last year. Shoppers visiting brand websites selling cosmetics (79%), sports and leisure clothing and equipment (71%) and maternity and children's products (61%) are more likely to see product reviews than those selling consumer electronics (28%) or fashion clothing and accessories (39%).

Almost half of brands selling to the UK (46%) provide reviews, as

do 35% of those selling to Poland, Slovakia, Hungary and France. Only 6% of those selling to Malta provide reviews, following a 6pp year-on-year decline. 10% of those selling to Cyprus do so.

A small and declining number of brands enable customers to add their own image to a review (-1 pp to 3%). Those most likely to do so included brands selling maternity and children's (9%), sports and leisure clothing and equipment and jewellery (both 6%). Brands selling in Slovenia, Spain, Luxembourg (all 5%) and the UK (4%) are somewhat more likely to enable this than those selling to Iceland (less than 1%), Norway, Romania, Lithuania and Bulgaria (1%).

Product ratings

44% of brands show product ratings, following a 1 pp decline among the 424 brands measured on this metric this year and last. Brands selling cosmetics (92%) and sports and leisure clothing and equipment (76%) are more likely to show ratings, while those selling consumer electronics (31%) are least likely. A large minority of brands selling to the UK (43%) show product ratings, yet few of those selling to Malta (5%; -7pp) or Cyprus (10%) do so. There were declines in this metric in both Malta and Iceland (-7pp to 11%). ■

The leading brands in The Customer Dimension

ADIDAS	F.HINDS	JACK & JONES	MISSGUIDED	ROMWE
APPLE	FOOT LOCKER	KARCHER	MUJI	T.M. LEWIN
THE BODY SHOP	GANT	MAMAS & PAPAS	NEW BALANCE	THOMAS SABO
CHARLES TYRWHITT	H&M	MANGO	OASIS	TRIPP
ELLIS BRIGHAM MOUNTAIN SPORTS	HP	MARKS & SPENCER	PANDORA	WHISTLES

FULFILLING SALES

Brands stand out in the Operations & Logistics Dimension when they promise to get products to the customer in fast and convenient ways, while also taking a flexible approach to returns

Getting products to the customer was a significant challenge during Covid-19 lockdowns. Customer demand to buy direct from brands encouraged many to expand their online businesses – along with their performance – at a time when many stores were shut.

In the Operations & Logistics Dimension, RetailX researchers assess brands on their delivery, collection and returns promises. It's evident that this is a Dimension where there have been particularly large year-on-year changes. Overall, fewer brands now offer fast and premium delivery services, while fewer again offer collection. However, there are significant rises in the use of reserve and collect and in-store returns, while attitudes to returns appear to be shifting from refunding the original delivery cost to pre-paid returns.

The most significant findings are grouped below through three questions: What delivery promises do brands make? What collection services do they offer? How do brands accept returns?

WHAT DELIVERY PROMISES DO BRANDS MAKE?

Delivery is becoming slower and less specific as brands step back from the race for ever faster and more convenient delivery. However, the cost is broadly similar to last year. For more on next-day delivery, see the Strategy & Innovation Dimension (page 18).

Nominated-day and time delivery

6% of brands now offer nominated-day delivery, following a 1pp decline from 7% last year. There's also been a 1pp decline to 1% in those enabling shoppers to name their time of delivery. Brands that are most likely to offer enable customers to name their day of delivery are those that sell cosmetics (14%), homewares (14%) and maternity and children's products (9%). Brands selling homewares (5%) and maternity and children's products (3%) are most likely to offer choice around the time of delivery.

Only 5% of brands selling sports and leisure clothing and equipment and fashion clothing and accessories now enable shoppers to name their day of delivery. This is slightly more available in the UK (6%) and Ireland (5%). Brands selling homewares (5%) and maternity and children's products (3%) are most likely to enable shoppers to name their time of delivery, a service that's slightly more common in Croatia, Greece and Switzerland (all 2%).

Cost of standard delivery

Brands now charge an average of €4.76 for standard delivery, following an average 1% rise, while the median brand charges €5 – the same as last year. Electronics brands charge the least, at an average of €2.92 and a median €3.22, followed by jewellers (€2.92/€3.22) and cosmetics brands (€3.44/€4.29). Homewares retailers charge the most (€5.50/€5.30). Shoppers in Romania (average €3.75/€3.54) and Poland (€4.40/€3.67) pay the least for standard delivery, while those in Iceland (€14.50/€11.00), followed by Malta (€7.91/€7) pay the most. The most significant year-on-year change was in Croatia, where the average cost of standard delivery increased by €2.99 to €8.36 and the median value rose by €1 to €6.

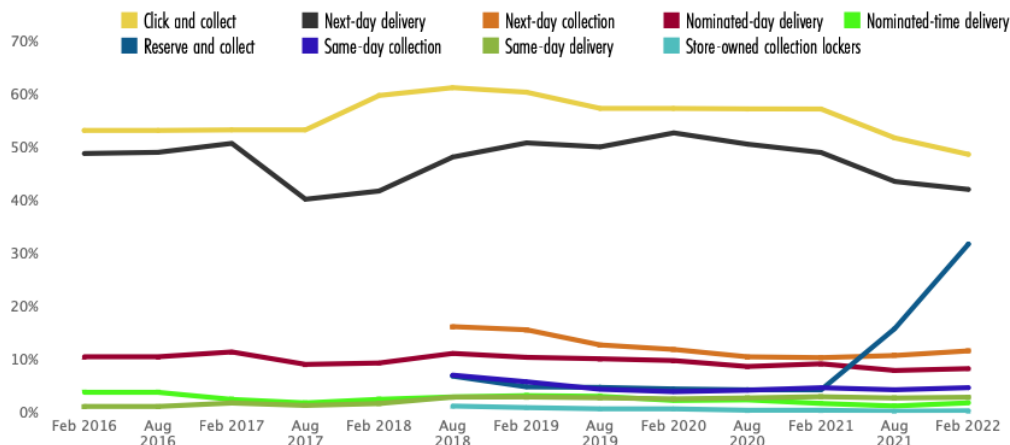
Free delivery threshold

Shoppers get their online order delivered for free when they spend an average of €68.90 (+€1.12) and a median of €50, the same as last year. They spend the least for free delivery when ordering cosmetics (average €35.20/median €38.30), and consumer electronics (€43.00/€42.70) and the most when ordering homewares (€299/€63.30) or maternity and children's products (€53/€45.80). Shoppers spend a median €41.50 for free online delivery in Czechia and a median €57.50 for delivery in Ireland.

The leading brands in the Operations & Logistics Dimension

BERSHKA	DIESEL	L'OCCITANE	PHASE EIGHT	STRADIVARIUS
BOUX AVENUE	ERNEST JONES	MARKS & SPENCER	RADLEY	TED BAKER
BURBERRY	GANT	MASSIMO DUTTI	RIVER ISLAND	TRIPP
CLAIRE'S	GIVENCHY	MULBERRY	ROBERT DYAS	UNIQLO
COTSWOLD OUTDOOR	H&M	OYSHO	SPACE NK	YOURS CLOTHING

Figure 13. The percentage of brands offering a fulfilment service



Note: Results cover a subset of Top500 brands measured every year since research started for a metric. This subset ranges from 220 to 250 brands, depending on the metric.

Source: RetailX

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WHAT COLLECTION SERVICES DO THEY OFFER?

Fewer brands now support collection of online orders (-6pp to 37%). Brands selling maternity and children's goods (61%) and fashion clothing and accessories (48%) are most likely to offer this service, while those selling consumer electronics (15%) are less likely. Collection is most widely available among Top500 European brands, in Belgium (38%), Spain and Czechia (both 36%), Lithuania and the UK (both 35%). The median cost of collection stands at €1.

Reserve and collect

There's been a significant year-on-year rise in the proportion of brands offering reserve and collect services (+26pp to 30%), which is likely to be linked to the expansion of online selling during and after the Covid-19 pandemic. The service, which enables shoppers to reserve an item and pay on collection, is most available from brands selling fashion clothing and accessories (38%) and sports and leisure clothing and equipment (38%) and less so from those selling consumer electronics (12%) or jewellery (28%). Reserve and collect is most widely available in the UK market, where use of the service has grown very quickly (+31pp from 2%) over the last year. There has also been fast uptake from a low base in Finland (+21pp to 24%) and Denmark (+18pp to 22%). No markets showed a decline in use.

Next-day collection

Slightly fewer (-1pp to 11%) brands now offer next-day collection than last year. Sectors in which the service is most available include jewellery (16%) cosmetics (15%) and fashion clothing and accessories (12%), while only 4% of consumer electronics and 7% of homewares brands offer this service. It is more widely found in Romania and Czechia (both 11%) and the UK (10%) and least in Croatia and Slovenia, where less than 1% of leading brands offer this service. There's been significant growth and decrease in the availability of this service, from Ireland (+6pp to 7%) and Czechia (+6pp to 15%) to Spain (-6pp to 8%).

Same-day collection

4% of brands offer same-day collection – the same as last year. Shoppers are most likely to be able to collect the same-day from brands selling cosmetics (12%) and jewellery (10%) – and least likely from a fashion clothing and accessories (2%) or sports and leisure clothing and equipment (4%) brand. Same-day collection is most available in Switzerland, Sweden, Norway and Estonia (all 6%) and hard to find in Croatia, Hungary, Luxembourg, Slovenia and Portugal (all less than 1%). Availability grew fastest in Norway and Sweden (both +4pp) and fell fastest in Ireland (-4pp to less than 1%).

HOW DO BRANDS ACCEPT RETURNS?

Just over half of retailers (+16pp to 55%) now accept online returns in-store, following significant growth over the last year. Those most likely to do so include brands selling maternity and children's products (73%), cosmetics (72%) and jewellery (69%), while consumer electronics brands (31%) are significantly less likely to do so. The multichannel service is most commonly available in Ireland (55%) with availability increasing in the UK (+19pp to 55%), Germany (+10pp to 46%) and France (+10pp to 49%).

Post remains the most common way to send back an unwanted online order, with 79% (+5pp) of brands supporting this. A quarter (+3pp to 25%) of brands enable shoppers to return their online order by dropping it off at a third-party location, while 15% (+1pp) will organise pick-ups from the home. Shoppers are most likely to be able to return jewellery (85%) by post, followed by fashion clothing and accessories and maternity and children's products (both 83%). The service is most widely available in Norway, Ireland (both 79%), the Netherlands (78%), the UK and Spain (both 77%). It is least available in Bulgaria (52%, -4pp).

Brands selling homewares (24%), fashion clothing and accessories (18%), sports and leisure clothing and equipment and consumer electronics (17%) are most likely to arrange returns via pick-up from the house. Those selling fashion clothing and accessories (28%), and maternity and children's products (24%), are most likely to support returns via a drop-off point. ■

SHOWING OFF WARES

Brands stand out in the Merchandising Dimension when they set out their products clearly and enable shoppers to save them for later

How brands show off the products they sell is the focus of the Merchandising Dimension. That starts with how they guide shoppers to the products that are right for them, how they illustrate and explain them, and whether they enable them to save products for later. RetailX researchers assess the performance of brands in this Dimension against more than 30 metrics. We group the most significant findings below through three questions: how do brands guide shoppers to the right product? How do they show their products? How do they enable shoppers to save products for later?

HOW DO BRANDS GUIDE SHOPPERS TO THE RIGHT PRODUCT?

Brands deploy tools ranging from a robust search to navigation filters to help shoppers find the items they want to buy.

Navigational filters

Brands are most likely to enable shoppers to filter their website searches by price. Just over half (52%) offer this in 2022 – the same as last year. Those selling maternity and children's products (79%) and sports and leisure clothing and equipment (62%) are most likely to feature this filter, yet few consumer electronics brands (15%) do so. This filter is most common among brands selling to the UK (51%) and Germany (47%; +4pp) and least common in Iceland (20%).

The biggest year-on-year change in the use of navigational filters is that fewer brands now enable shoppers to filter their searches by product type (-12pp from 91% to 79%). Use of this filter remains higher among brand websites selling maternity and children's goods (86%), fashion clothing and accessories (84%) and sports and leisure clothing and equipment (83%).

There's been a small decline in the availability of search by brand, down 3pp to 32% of the 355 brands assessed on this metric both this year and last. This is more likely to be available on sites selling maternity children's products (65%) and least likely on site selling consumer electronics (19%) and jewellery (24%).

A small minority (8%) of brands enable shoppers to search by product rating – the same as last year. Again, brands selling maternity

and children's product (28%) and cosmetics (21%) are more likely to offer this, while less than 1% of those selling consumer electronics do so. Brands are most likely to offer filter by ratings when selling to Estonia, Lithuania and Austria (all 9%) and least likely when selling to Malta (2%), Cyprus, Romania, Ireland or Iceland (all 3%).

Search

More than two-thirds (68%) of brands offer drop-down search suggestions to shoppers as they type search queries on their mobile website. That's 11pp up from 57% a year earlier, among the 346 brands measured on this metric both this year and last. This feature is most often used by brands selling maternity and children's goods (80%), cosmetics (77%) and fashion clothing or accessories (73%), as well as among those selling to Iceland (82%), Slovenia (73%) and Hungary (72%). It is least used by those selling consumer electronics (47%) or homewares (55%).

Almost a third (31%) of brands now deploy infinite scroll on their mobile websites. That's 5pp higher than last year among the 346 brands measured in both periods. It's most likely to be used on mobile websites selling cosmetics (47%), maternity and children's products (38%), while just over a third (34%) of sites selling fashion clothing and accessories use it. It's least likely to be seen on sites selling consumer electronics (11%).

HOW DO BRANDS SHOW THEIR PRODUCTS?

Strong brand imagery and relevant recommendations help shoppers understand whether an item is right for them.

Product page images

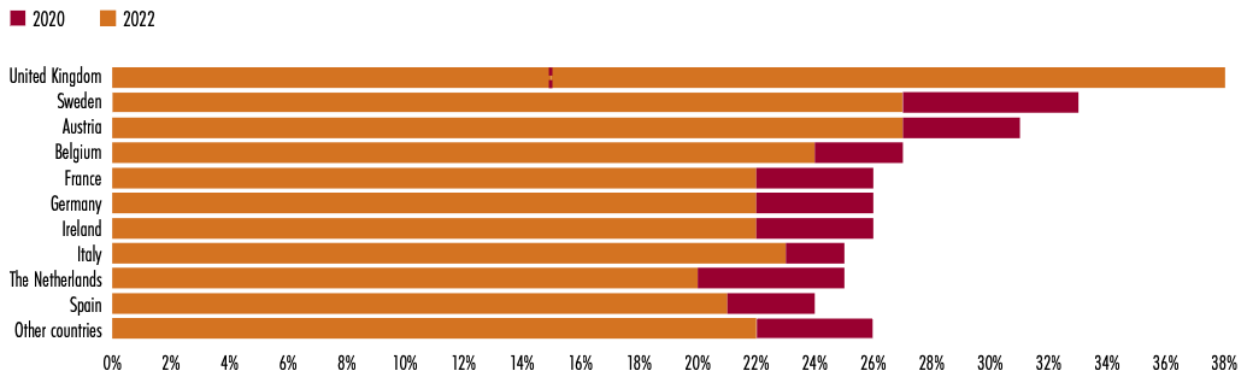
More brands (60%) now offer customers a choice of product images, following a 25pp increase from 35% of 251 traders assessed on this metric both this year and last. Those selling sports and leisure clothing and equipment are most likely to show shoppers several images of a product, with 74% of brands in the category doing so, followed by those selling fashion clothing accessories (69%). Consumer electronics brands are the least likely to do so. A choice of images

The leading brands in Merchandising Dimension

ADIDAS	CROCS	JOJO MAMAN BEBE	RALPH LAUREN	SCOTCH & SODA
AGENT PROVOCATEUR	EARLY LEARNING CENTRE	KURT GEIGER	RAZER	SHOPDISNEY
APPLE	G-STAR RAW	LENOVO	REI	WHITE STUFF
THE BODY SHOP	H&M	LOEWE	ROBERT DYAS	WILKO
COAST	HUGO BOSS	NEW LOOK	SAMSUNG	YOURS CLOTHING

Figure 14. To what extent do brands selling in European markets enable shoppers to save their basket?

The percentage of brands localised to a country offering the service in 2020 and 2022



Only the UK and Iceland (not shown) showed an increase since 2020.

Note: the countries shown here are the ones with the most localised retailers assessed on this metric. The remaining 22 are averaged to show the 'Other countries' values

Source: RetailX

© RetailX 2021

is most likely to be offered by those selling in the UK (60%; +22pp), France (57%; +7pp) and Germany (56%, +10pp).

Zoomable product images

Just under two thirds (65%) of brands now have zoomable product images on their mobile website, following a 3pp year-on-year decline. Images are more likely to be zoomable on mobile sites selling sports and leisure clothing and equipment (82%) and fashion clothing and accessories (71%) and when selling to Portugal (74%) and Iceland (73%). They are less likely to be so when selling consumer electronics (24%) or to Greece and Hungary (both 62%).

Recommendation strategies

Two-thirds (66%) of brands now recommend similar products, following an 8pp decline from 74% last year. Brands selling fashion clothing and accessories (70%) are the most likely to do this, followed by those selling maternity and children's goods (68%) and homewares (67%). Those selling consumer electronics (40%) and jewellery (59%) are least likely to do so. Brands selling to Portugal (71%) and Cyprus (70%) are more likely to make these recommendations.

A third (33%) of brands recommend complementary products – ones that will go with another products they are considering buying – to shoppers. That's 9pp down from 42% a year earlier. Consumer electronics (41%) and homewares (38%) brands tend to use this tactic more than those selling sports and leisure clothing and equipment (31%) and fashion clothing and accessories (32%). Shoppers buying in Latvia (58%) and Lithuania and Hungary (both 55%) are more likely to see products recommended that might go with another item than those buying in the United Kingdom (34%), Iceland and Spain (44%).

Just over a quarter (-2pp to 26% of 354 measured on this metric this year and last) of brands offer recommendations that 'upsell' shoppers to more expensive products. More than half of cosmetics (52%) brand websites do this, as do more than a third of sites selling

consumer electronics (36%). However, few jewellers (10%) or fashion clothing and accessories brands (21%) do so. This tactic is often found on sites selling to Austria (35%) and Switzerland (31%).

HOW DO BRANDS ENABLE SHOPPERS TO SAVE PRODUCTS FOR LATER?

Shoppers buying from a leading brand are now more likely to be able to save a product for later than in previous years. But while more than half of brands enable shoppers to save goods on a wishlist, most do not yet enable them to save their basket.

Save shopping cart

More than a third (35%) of retail brands now enable shoppers to save their basket, enabling them to come back later to complete a purchase, even if that's on a different device or at a more convenient time. That's doubled in the last year, rising by 18pp from 17%. Shoppers are more likely to be able to save their basket when they buy from a sports and leisure clothing or equipment shop – 46% offer this option. That's followed by brands selling homewares (40%), fashion clothing or accessories (40%). At the other end of the scale are consumer electronics brands (24%). Those selling to customers in Austria (43%) are most likely to support basket saving, followed by the UK (37%) – the latter after 23pp growth.

Save to list

More than half (-1pp to 56%) of brands now enable customers to save items to a wishlist. This can be convenient for those who are not yet ready to buy and can mean they will be more inclined to buy when they return. Brands that are more likely to offer this service include those selling maternity or children's products (74%), cosmetics (69%) and fashion clothing and accessories (61%). Those selling consumer electronics (12%) are least likely to do so. Most brands selling in Iceland (81%), Cyprus (61%) and Greece (60%) offer wish lists, while less than half of this selling in Sweden, Norway (both 44%) and Croatia (45%) do. ■

ENGAGING THROUGHOUT THE SHOPPER JOURNEY

Brands that strive to build relationships with their customers stand out in the Engagement Dimension

Brands that engage with their customers build confidence by being available to answer their questions, while also enabling shoppers to share their honest opinions of a product.

RetailX researchers assessed how brands engage with customers across the shopping journey through a range of metrics, starting with engaging on the landing page and going through to the checkout. The findings are set out below through three questions: how do brands engage with shoppers on the landing page? How do they engage with them at the checkout? How do brands enable shoppers to share products – and their opinions of them?

HOW DO BRANDS ENGAGE WITH SHOPPERS ON THE LANDING PAGE?

When shoppers first arrive at a website, they may well be keen to find out more about the brand they are buying from. Enabling them to follow social media, newsletters and live chat links helps them to get their questions answered.

Subscribe to newsletter on the landing page

Most brands now enable shoppers to subscribe to their newsletter (+3pp to 76%) when they arrive on their website. Newsletter sign-up is most often found on brand websites that sell sports and leisure clothing and equipment (84%), fashion clothing and accessories (82%) and jewellery (81%). It's found least often on those selling consumer electronics (46%) and homewares (69%). Brands are most likely to offer newsletters to shoppers in the UK (78%), followed by the Netherlands (75%), Luxembourg (74%), Switzerland and Ireland (both 73%) and least likely to shoppers buying from Iceland, Slovakia (both 62%) and Greece (64%). Fewer brands selling to Lithuania (-3pp to 68%) offer this service than last year. The biggest year-on-year change was in the 5pp increase in the Finnish market to 70%.

Social links on the landing page

Most brands share social links for shoppers as they arrive on their website, although the proportion doing so has declined slightly since last year –down 3pp to 89% of 303 retailers assessed on this metric both this year and last. Brands selling maternity and children's products (99%) are most likely to do so, followed by those selling sport and leisure clothing and equipment (90%) and fashion clothing and accessories (89%). The lowest level of use is among cosmetics brands (82%), although this is still relatively high. Brands are most likely to share social links when selling to Iceland (93%), Luxembourg, Italy and Cyprus (all 92%) and least likely when selling to Greece (-4pp to 82%) and Malta (-5pp to 85%), although again, a relatively high number of brands still do so.

Live chat

Fewer brands now offer their customers live chat (-8pp to 3%) within a minute of landing on a website. Those most likely to continue to do so include brands selling cosmetics (8%) and fashion clothing and accessories shops (3%). Only 1% of maternity and children's products brands and 2% of consumer electronics shops do so. The service is most available to brands selling in Lithuania (10%) and Slovakia (9%) and least available in the UK (-8pp to 3%) and Germany (-2pp to 3%).

How do brands engage with shoppers at the checkout?

Brands face a choice at the checkout – either to require shoppers to register, or to make that an option while also hosting third-party checkouts. While requiring registration can put an extra hurdle into the shopper journey, it can also help brands get to know their customers.

Registration before checkout

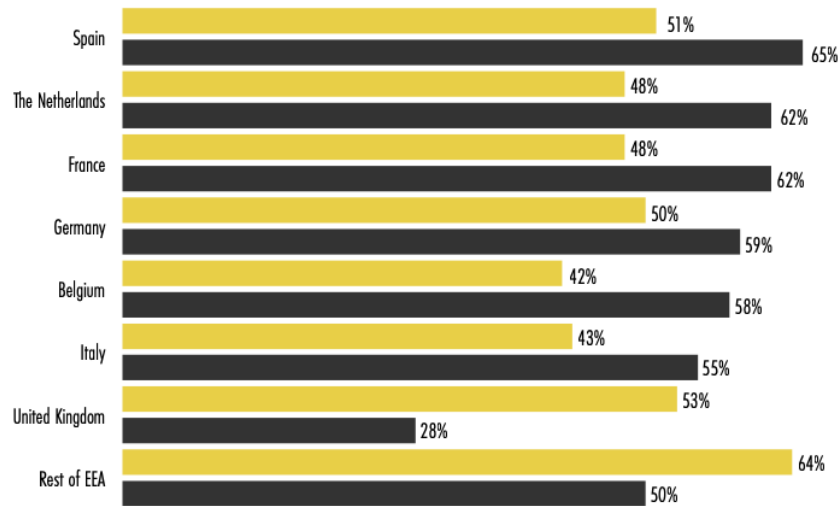
66% of brands require shoppers to register before checkout, after an 18pp increase over the last year from 48% previously. Jewellers

The leading brands in Engagement Dimension

THE BODY SHOP	DUNE LONDON	HOTEL CHOCOLAT	NEW BALANCE	REISS
BOSE	ELLIS BRIGHAM MOUNTAIN SPORTS	L'OCCITANE	OLIVER BONAS	TRESPASS
BRAVISSIMO	ERNEST JONES	LEGO	PANDORA	WHISTLES
CREW CLOTHING COMPANY	FARROW & BALL	MANGO	PAVERS	WHITTARD OF CHELSEA
DREAMS	H&M	MARKS & SPENCER	PHASE EIGHT	YANKEE CANDLE

Figure 15. Registration required before checkout

■ Feb 2020
■ Feb 2022



Note: Only countries where more than 100 retailers were tested are included

Source: RetailX

CC BY ND RetailX 2021

(81%) and those selling fashion clothing and accessories and sports and leisure clothing and equipment (both 78%) are the most likely to do so, RetailX research suggests, while those selling maternity and children's goods (60%) are least likely. 71% of brands in the UK require registration, along with those selling in Germany (49%) and Italy (43%), contrasting with those in Iceland (25%), Croatia (27%) and Latvia (28%).

PayPal checkout

Just over a quarter (27%) of brands enable shoppers to use PayPal to pay, a figure unchanged on the previous year. The checkout is more widely found among brands selling maternity and children's (36%) sports and leisure clothing and equipment (35%) and fashion clothing and accessories (32%). It is found less among those selling consumer electronics (10%) and homewares (15%). It is also more commonly found in the UK (28%) and Germany (27%) and less so in Iceland (5%) and Cyprus (-12pp to 8%).

How do brands enable shoppers to share products – and their opinions of them?

Online shoppers who value other people's opinion of the items they are considering buying can turn to reviews and ratings, or share a product to ask a friend.

Share with friends

Just under a third (32%) of brands now enable shoppers to share a product on their website with friends. That's down 10pp from 42% a year earlier. Shoppers are more likely to be able to do this when buying from a brand selling cosmetics (59%) or maternity and children's products (41%), and least likely when buying from a homewares (28%) or consumer electronics brand (13%). Brands selling to Cyprus (49%), Malta (46%) and Iceland (45%) support this to a greater extent than those selling to Denmark (26%), the

Netherlands (28%) or Sweden (28%) – although there was a 6pp decrease among brands selling to Sweden.

Product reviews and ratings

44% of brands now share product views with customers, following a 5pp decline from 49% last year. Shoppers visiting a brand websites selling cosmetics (79%), sports and leisure clothing and equipment (71%) and maternity and children's products (61%) are more likely to see product reviews than those selling consumer electronics (28%) or fashion clothing and accessories (39%). Almost half of brands selling to the UK (46%) provide reviews, as do 35% of those selling to Poland, Slovakia, Hungary and France. Only 6% (-6pp) of those selling to Malta and 10% of those selling to Cyprus do so.

A small and declining number of brands enabled customers to add their own image to a review (-1pp to 3%). Those most likely to do so included brands selling maternity and children's (9%), sports and leisure clothing and equipment and jewellery (both 6%). Few of those selling fashion clothing and accessories or cosmetics (both 2%) enable this. Brands selling in Slovenia, Spain, Luxembourg (all 5%) and the UK (4%) are somewhat more likely to enable this than those selling to Iceland (less than 1%), Norway, Romania, Lithuania and Bulgaria (1%).

Product rating

44% of brands showed product ratings, following a 1pp decline among the 424 brands measured on this metric this year and last. Brands selling cosmetics (92%) and sports and leisure clothing and equipment (76%) are more likely to show ratings, and those selling consumer electronics (31%) least likely. A large minority of brands selling to the UK (43%) show product ratings but few of those selling to Malta (5%; -7pp) or Cyprus (10%) do so. There were 7pp declines in both Malta and Iceland (to 11%). ■

PUTTING MOBILE CENTRE STAGE

Brands that put the smartphone at the heart of each shopper's buying experience stand out in the Mobile & Cross-Channel Dimension

With 88%^[1] of UK adults owning a smartphone in 2021, it makes sense for brands not only to enable shoppers to browse and buy from them but also to use multichannel services that are often operated from smartphones. RetailX researchers analyse the extent to which brands' performance in this Dimension through more than a dozen metrics. Below, we focus on the most significant mobile and multichannel findings, set out through two questions: do brands have a mobile app and do they promote it on their website? How do brands enable shoppers to use their mobile device for multichannel services?

DO BRANDS HAVE A MOBILE APP – AND DO THEY PROMOTE IT ON THEIR WEBSITE?

A steadily growing minority of leading brands offer mobile apps, with iOS apps more commonly available than Android apps. As yet, relatively few promote these apps on their website's landing page.

iOS app

30% of brands have iOS apps following a 2pp increase from the previous year. Brands selling consumer electronics (56%) and maternity and children's products (46%) are most likely to have iOS apps, while those selling sports and leisure equipment and clothing (29%) and cosmetics (30%) are less likely to do so. All of the leading brands that sell in most markets offer iOS apps. In the UK, 28% do so, following a 2pp increase.

Android app

More than a fifth (23%) of brands now have Android apps, following an 8pp increase over the last year. Brands selling consumer electronics (42%) and jewellery (36%) are most likely to have an Android app, while only 18% of those selling sports and leisure clothing and equipment and 24% of those selling cosmetics do so. All brands selling in markets including Austria, Belgium, Slovakia, Sweden, Romania, Czechia and Switzerland

have Android apps, yet only 21% of those selling in the UK do so, following a 7pp increase.

App links on landing page

10% of the 303 brands assessed on this metric both this year and last show links to their apps on their landing page. Brands selling fashion clothing and accessories (11%) and homewares (9%) are more likely to do so than those selling cosmetics (1%) and sports and leisure clothing and equipment (3%). Landing page app links are more often shown to those buying from Cyprus (18%) and Lithuania (15%) than shoppers in Iceland (6%), France or Poland (both 7%). The most significant increase on this metric was in Iceland (+4pp to 7%), while there were small declines in Switzerland (-1pp to 12%), Belgium (-1pp to 11%) and Poland (-1pp to 8%).

HOW DO MULTICHANNEL BRANDS ENABLE SHOPPERS TO USE THEIR MOBILE DEVICE FOR MULTICHANNEL SERVICES?

Fewer than half of those brands that have stores now enable shoppers to find their nearest branch through a store finder on their mobile website, while brands appear to be moving from enabling stock checking for specific stores to showing online stock visibility on their mobile website. At the same time, there's been a rise in the proportion of brands enabling shoppers to reserve that stock for collection, as well as to return unwanted online orders to the store.

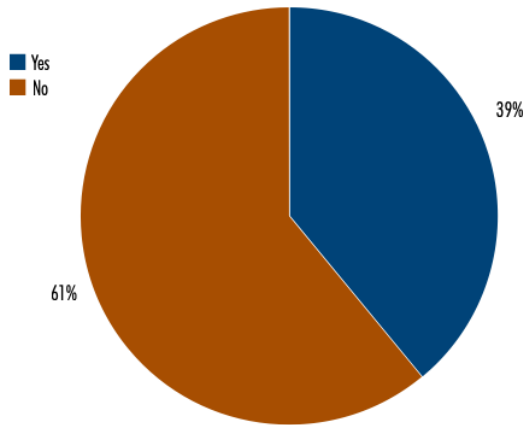
Return to store

Just over half of retailers (+16pp to 55%) now accept online returns in-store, following significant growth over the last year. Those most likely to do so include brands selling maternity and children's products (73%), cosmetics (72%) and jewellery (69%), while consumer electronics brands (31%) are significantly less likely to do so. The multichannel service is most commonly available in Ireland (55%)

The leading brands in the Mobile & Crosschannel Dimension

BALENCIAGA	CLAIRE'S	JYSK	MIO	PIMKIE
BATA	EARLY LEARNING CENTRE	LASCANA	MORGAN	STRADIVARIUS
BERSHKA	GEOX	LONGCHAMP	OBAIBI-OKAIDI	TISSOT
CACHE CACHE	GLOBUS	MARKS & SPENCER	OBI	TRIPP
CHRIST	HUNKEMOLLER	MASSIMO DUTTI	ORBEA	UNIQLO

Figure 16. Percentage of brands offering a return-to-store service, February 2020



Source: RetailX

while there have been large increases in availability in the UK (+19pp to 55%), Germany (+10pp to 46%) and France (+10pp to 49%).

Collection

Fewer brands now enable customers to collect their online orders in-store (-6pp to 37%). Brands selling maternity and children's goods (61%) and fashion clothing and accessories (48%) are most likely to offer this service, while those selling consumer electronics (15%) are less likely. Collection is most widely available, among Top500 European brands, in Belgium (38%), Spain and Czechia (both 36%), Lithuania and the UK (both 35%). They are least available in Greece and Iceland (both 14%). The availability of collection services has grown most quickly in Finland, Luxembourg (both +7pp to 32%) and Croatia (+7pp to 35%). It has fallen most sharply in the UK (-6pp to 36%) and Latvia (-6pp to 26%).

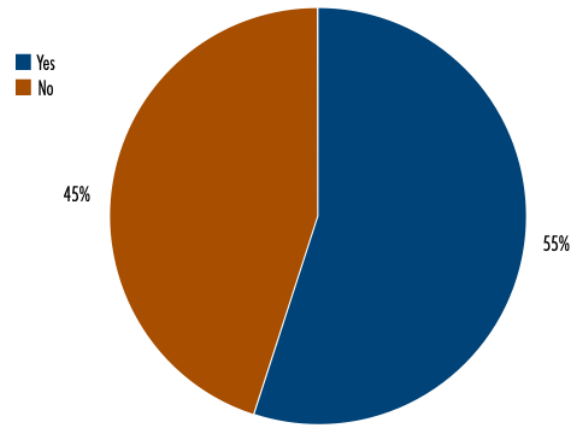
Reserve and collect

There's been a significant year-on-year rise in the proportion of brands offering reserve and collect services (+26pp to 30%), which is likely to be linked to the expansion of online selling during and after the Covid-19 pandemic. Reserve and collect is more likely to be available from brands selling fashion clothing and accessories (38%) and sports and leisure clothing and equipment (38%) and less so from those selling consumer electronics (12%) or jewellery (28%). Reserve and collect is most widely available in the UK market, where use of the service has grown very quickly (+31pp from 2%) over the last year. There has also been fast uptake from a low base in Finland (+21pp to 24%) and Denmark (+18pp to 22%). No markets showed a decline in use.

Store stock checking on mobile web

There's been a sizeable decline in the proportion of multichannel brands – those with stores in the local market – that enable shoppers to check store stock from their mobile website, with a 13pp drop to 15% from 28% of 303 retailers assessed on this metric this year and

Figure 17. Percentage of brands offering a return-to-store service, February 2022



Despite – or perhaps because of – the pandemic closing stores, the average multichannel retailer is much more likely to support returns of online-ordered products to its stores

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last. Those most likely to do so include homewares (34%), jewellers (28%) and maternity and children's goods (27%). Those selling consumer electronics (15%) and sport and leisure clothing and equipment (16%) do so less often.

Shoppers buying from Cyprus (44%) are the most likely to be able to check store stock, while those in the UK and Germany (both 19%) are the least likely. The most notable year-on-year changes were in Iceland (-15pp to 25%), Cyprus (-4pp to 37%) and Finland (+3pp to 25%).

Stock visibility on mobile web

More than a quarter (+5pp to 26%) of brands now show the overall availability of stock from their mobile website. Brands that do so include those selling homewares (44%), maternity and children's products (36%) and jewellers (34%), while consumer electronics (7%) and fashion clothing and accessories (24%) brands are least likely to do so.

Brands selling to Luxembourg (36%), Slovenia (33%) and Spain (32%) are most likely to do so, while those selling to Malta (13%) and Cyprus (15%) are least likely to. Use increased most notably in Italy (+10pp to 28%), Estonia (+8pp to 20%), while there were 1pp dips in Hungary and the Netherlands.

Store finder

Just under half of brands that have stores in each local market have a store finder on their mobile website, following a 3pp increase from last year among the 346 brands measured on this metric both this year and last. Jewellers (71%) and cosmetics brands (67%) were the most likely to do so, while consumer electronics brands (24%) were the least likely. Brands selling to the UK (47%), Iceland and Italy (both 39%) are more likely to do so, those selling to Romania (22%) and Czechia (25%) are least likely. Most regions saw the use of store finders on mobile websites decline, including most notably Portugal (-9pp to 29%) and Switzerland (-8pp to 31%), while the only increase was in the UK (+3pp). ■

[1] www.statista.com/statistics/956297/ownership-of-smartphones-uk/

OPERATIONS & LOGISTICS

GIVENCHY:

flexible delivery and returns

Givenchy, founded in 1952 as an haute couture fashion house by Hubert de Givenchy, is now an international luxury brand that sells around the world through a multichannel business model.

The clothing and perfume brand this year celebrates its 70th anniversary as part of the LVMH group. Today it has a presence in 69 countries around the world, including through 50 stores and a global website. It aims to continue its strategy of international expansion by opening more than 20 boutiques a year, in capital cities around the world and particularly in the US, Middle East, Europe and Asia.

Those international brand values are reflected on the Givenchy website where shoppers can opt to see a localised version by selecting the relevant currency and country and separately, the relevant language, from four language options. That means that shoppers can opt, for example, to see the French euro currency website in English, Italian or Mandarin Chinese. They can localise the site to more than 50 different markets, including 28 in Europe.

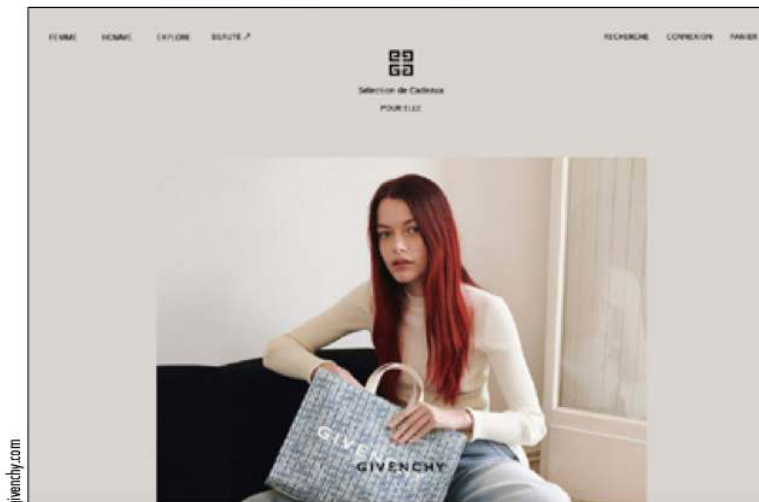
Givenchy stands out in particular in the Operations and Logistics Dimension of the 2022 RetailX Brand Index for the strength of its delivery and returns promise. On its domestic France website, its promises include a range of delivery options including free delivery and, at a price, morning, Saturday or concierge delivery. Shoppers can also collect from Givenchy's three Paris shops. Returns can be made within 30 days of receipt either online, in-store, via courier or a third party drop-off point. Customers can also use the stock checker to find out where an item is in stock.

Givenchy also performs strongly across the dimensions, thanks to a site that offers clear navigation and suggests search terms while the customer is typing their query – before showing products through a choice of zoomable images. Information on the product page ranges from where products are made to what they are made of, and how to care for them, to a size guide and delivery and returns information. It's easy to contact a member of the customer services team, available by email, by telephone and through live chat. Newsletter sign-up and social media links are both available on the home page.

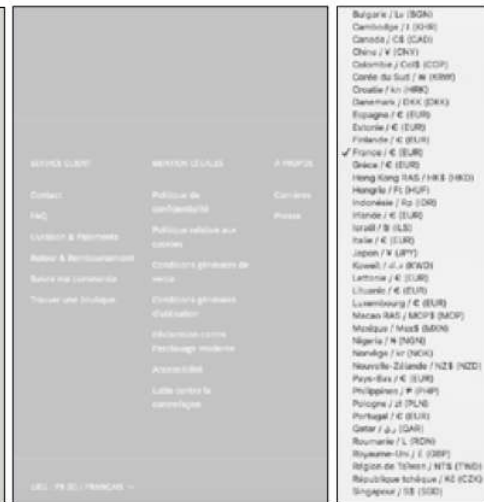
In all, Givenchy offers depth of customer service through an easy-to-navigate website that performs strongly on mobile.



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THE CUSTOMER

THE BODY SHOP:

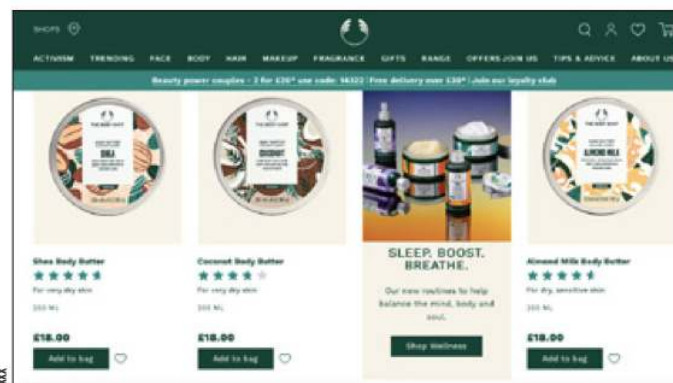
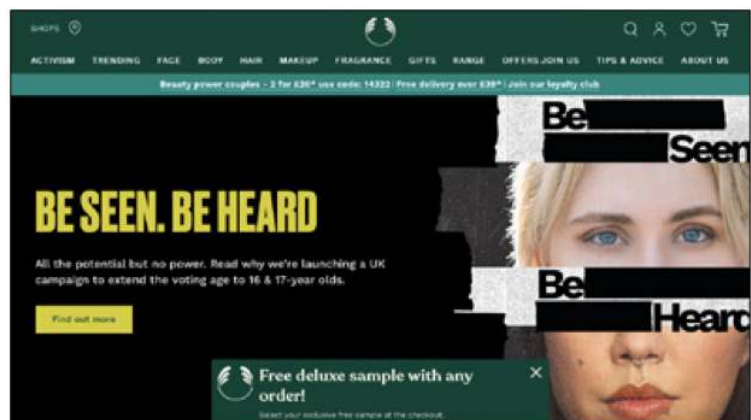
reflecting customer values

The Body Shop has always been a campaigning brand – and that's something that remains true today. Back in 1976, Anita Roddick founded the brand as a cruelty free cosmetics company that didn't test products on animals. Products, sold in refillable packaging, were designed to make customers feel good about themselves. Today the brand is owned by Natura & Co and has been B Corp certified since 2019, with a commitment to campaigning that still endures. In its UK home market, The Body Shop is currently running a campaign to extend the voting age to 16 and 17-year-olds, while a section of its website explores its history of activism, which it sums up as working "for long-term, systemic social change for the next generation". In-store it is rolling out refill stations where customers top up on their favourite products while using the same long-lasting aluminium packaging. Over the years it has pioneered an approach to brand values that has become more mainstream in recent years. Today the emerging generation of customers expects the brands that they buy from to reflect their own values to a greater extent than in previous decades.

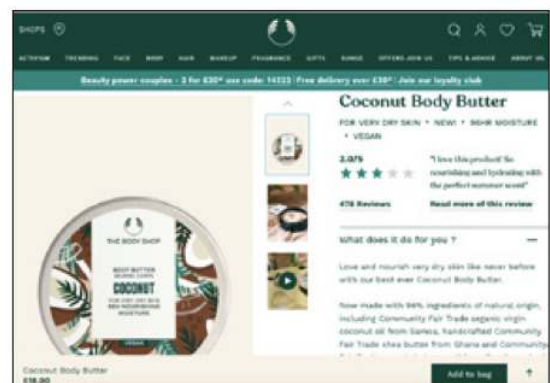
The Body Shop stands out in The Customer Dimension for its use of product ratings and reviews. The brand illustrates its products with both star ratings and product reviews. Star ratings include sub ratings for performance, quality and value, while the helpfulness of a review is rated by other customers. Website users can then sort reviews by factors including helpfulness, rating, and recency. Reviews sit alongside in-depth product descriptions which include details of how a product's ingredients

and packaging are made and sourced.

The Body Shop website also includes lots of customer-friendly advice, from 'how to' guides to skincare advice alongside more general advice on subjects such as how to relax at stressful times to improving sleep quality. A 'trending' page points website visitors to the latest products and trends, and the site also has a loyalty club offering points that can be spent on the website as well as special offers and competitions. Customers can also get in touch to ask for help though a live chat service. The Body Shop is one of only 3% of brands listed in this index that continue to offer the service to shoppers after an eight percentage point decline over the last year. However, it is in the category – cosmetics – that has the highest use of live chat, at 8%.



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MOBILE & CROSS-CHANNEL

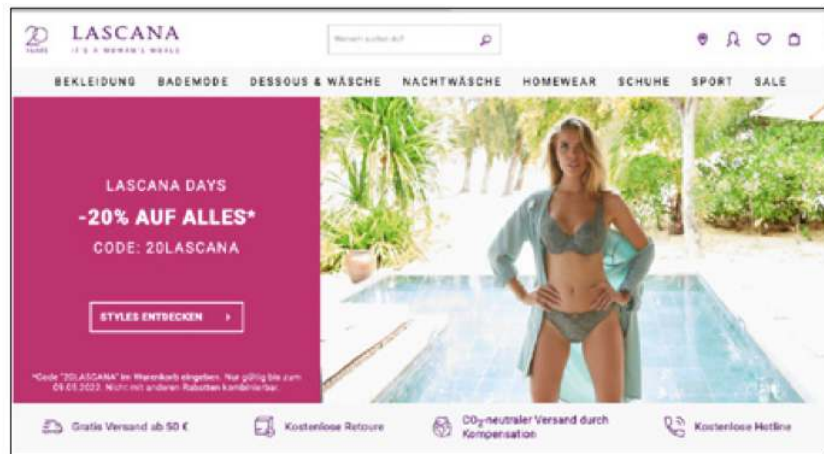
LASCANA: serving customers across channels

Multi-brand swimwear and lingerie company Lascana was founded in Germany in 2006 and, since 2015, has added international dedicated websites for eight further markets, including the US, Switzerland, the UK and Scandinavia. The Otto Group-owned brand has 26 of its own stores in Germany as well as more than 900 shops-within-a-shop in the market.

Lascana has a multi-brand approach and sells both under its own Lascana brand and through a range of other brands, from Bench to Venice Beach.

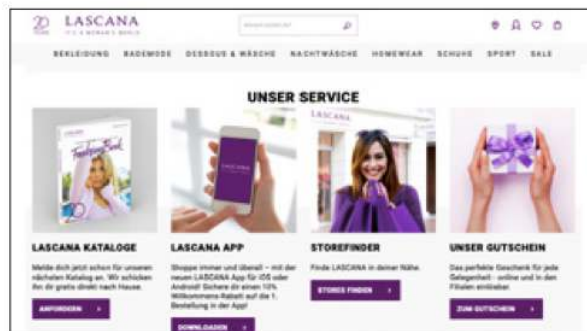
Lascana stands out in the Mobile & Cross-channel Dimension both for its use of mobile apps and for the multichannel services it offers. The brand flags up both its iOS and Android apps on the home page of its domestic German website. Features of the app include an interactive bra guide that enables shoppers to check they have the right fit, as well as access to a free service hotline. Shoppers can save their favourite items to a wishlist and are offered a 10% discount when they download the app, along with ongoing regular discounts and offers.

The brand offers a range of multichannel services that enable shoppers to order online and pick up in store, or return an unwanted online order to a store. Shoppers can collect online orders from a Lascana store or concession for free, or from a Hermes parcel shop for free when they spend at least €50. They can return goods they ordered online via Hermes – which has more than 16,000 parcel shops in Germany – or to a Lascana shop within 30 days of receipt.

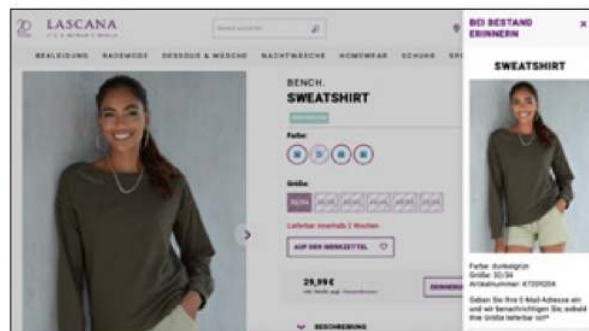


The brand performs strongly in other areas of research, setting out both payment and delivery options on its website, from which it offers social media users quick links to four channels – Facebook, Instagram, Pinterest and YouTube – and enables sign-ups to its newsletter. The website also promises that its shipping options are carbon-neutral.

The site is easy to navigate and search, with products shown through a range of images as well as detailed information such as product materials and availability. Shoppers can sign up to email alerts to find out when the item they are interested in is back in stock in a particular size. They can also save their favourite items on a wishlist and sign into an account, enabling them to save delivery details as well as adding items to their basket for later on.



Users get a 10% discount for downloading the app



Detailed information complements clear product shots

MERCHANDISING

SHOP DISNEY:

helping shoppers find the right item online

The Walt Disney Company has been selling branded merchandise related to its cartoons, films and characters since 1987, when it opened its first Disney Store in California. In 2010, it had more than 350 shops but since then has steadily reduced its numbers, according to Statista figures^[1]. Today, its store locator^[2] shows just three shops serving Europe – in Paris, London and Dublin. Instead, it is taking an online-first approach to selling direct to shoppers in the European market. It also has a large wholesale business that sells through a range of third-party retailers.

The company has two European transactional shopDisney websites, with UK and EU versions of the site. Both emphasise free delivery – when shoppers spend at least £50 or €50 – while offering multichannel collection and returns services through parcel shop click and collect locations. Collection costs £2.95 but it's free to return an item. In the UK, standard delivery now costs £3.95 for a five-day service, while express next-day delivery is £5.95. Fulfilment information is shared on both the product page as well as the landing page.

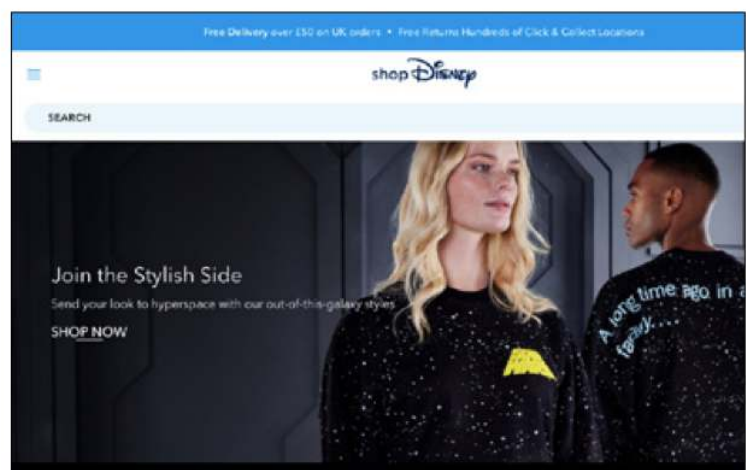
The Disney website stands out in the Merchandising Dimension of the Brand Index for its comprehensive approach to site navigation that makes it easy to find a product. The mobile-friendly site offers easy-to-use navigation that is based around the filters that are most relevant in any given category. Shoppers hunting for gifts, for example, can search by occasion, by recipient, by price, by franchise, and whether items can be personalised. Similarly, those searching for toys and fancy dress can narrow down their search using filters such as collectibles.

The website illustrates products well, with a choice of zoomable images and details alongside ratings, reviews and delivery information, which are visible on the product page. From the landing page, shoppers can see delivery and payment information, sign up for newsletters updates and click through to social media sites.

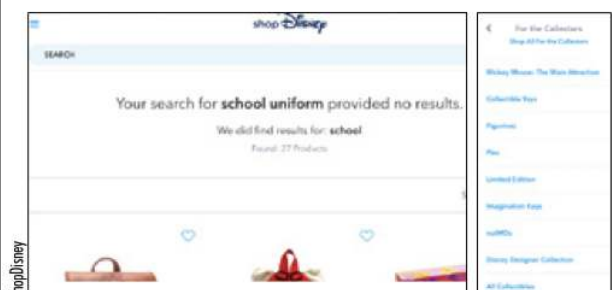
Visitors to shopDisney can save an item for later on a wishlist, and at the checkout, have the option of checking out as a guest or signing in to an account. A no results search shows alternative results and products – a strategy that may lead to some incremental sales. The site also links to other parts of the Disney business, including the Disneyland Paris resort.

[1] www.statista.com/chart/24343/number-of-disney-stores-worldwide/

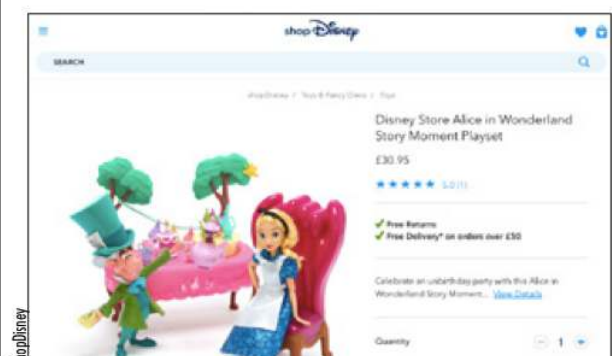
[2] www.shopdisney.co.uk/store-locator



Disney is taking an online-first approach in Europe



No results searches suggest alternative products



Zoomable images makes the most of Disney's IP

ENGAGEMENT

PANDORA:

sharing your love of jewellery online

Pandora started life in 1982, with a single jeweller's shop in Copenhagen, Denmark. Today, it is a global brand that reaches customers in more than 100 countries across six continents. It takes a multichannel approach that includes an international network of websites and more than 6,800 physical points of sale, including about 2,600 concept stores.

The brand stands out in the Engagement Dimension for the way that it enables shoppers to share their opinions, using product ratings and reviews, and for its use of social media.

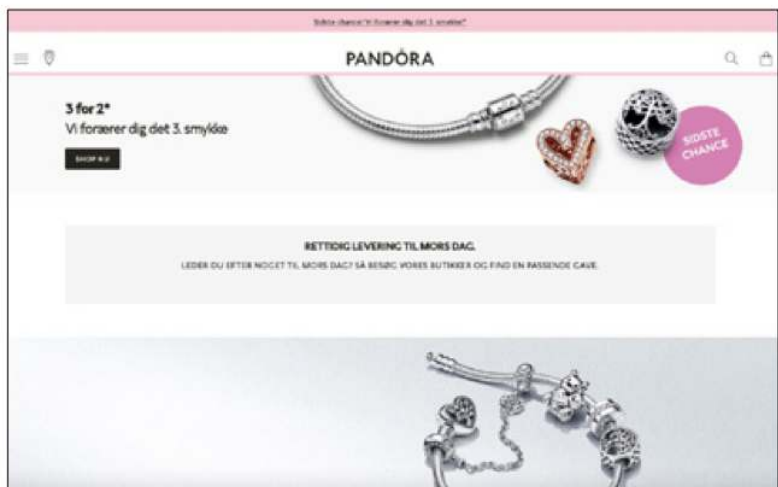
From its home brand, Pandora shares links to its social media pages – Facebook, YouTube, Twitter, Pinterest and Instagram. It has more than 17m followers on Facebook and more than 8m on Instagram, where it shares offers alongside inspiring and seasonal product images and videos. At the time of research, the site featured a 'May the Fourth' Star Wars promotion featuring its themed jewellery.

From its home page, it flags up delivery information and enables shopper to change their market, taking them to the most relevant local currency, payment and delivery options.

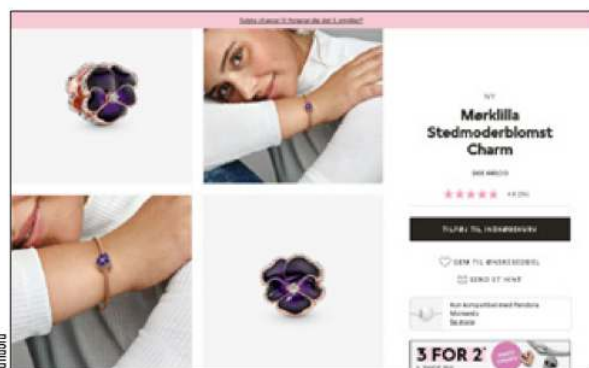
Engagement continues on the product page, where Pandora tells visitors about each product through a series of images and information, ranging from which products each charm is compatible with to product reviews and star ratings. Visitors can opt to sort reviews by relevance, by rating and by newness. If shoppers find an item they like, they can save it for later on a wishlist, or drop a hint for a present either by email or Facebook.

At the checkout, shoppers have to register to pay – an approach that means Pandora can learn more about its customers and potentially develop long-term relationships. Pandora also gets to know its shoppers via Club Pandora, which promises fast ordering, exclusive offers and surprises.

Customers can pay through methods including PayPal since Pandora is one of the 27% of Top500 brands that enable shoppers to use this payment method. On its domestic website, the Danish retailer offers with free, standard three to five-day delivery when shoppers spend at least DKK 399, with express options also available. Returns can be made for up to 30 days, using a pre-paid return label. Shoppers with a question can ask it via the telephone or live chat, since Pandora is one of 3% of Top500 brands that offer the latter option.



The compatibility of items is key to Pandora's success



Danish customers can enjoy free 3 to 5-day delivery

CONCLUSION

Brands are now tasked with finding new ways of reaching and talking to customers, at a time when the way they want to buy is changing fast. The last few years have been demanding, with faster and greater change than was ever expected. Through the pages of this report, we've focused on the practical steps that leading brands are taking to make that change. We've seen that performance is generally improving at a rapid enough pace to keep up with such change. Most leading brands now have strong yet simple websites that respond to their customers' changing needs.

We've found significant changes in approach, driven by changing patterns of customer behaviour over the last year. This is something that we'll track continually over the coming year.

Our congratulations to all of those brands listed in this RetailX Europe Brand Index, from the Elite to the Top500, on their success in leading the way.

As always, we'd like to hear how we could do better, expanding or refining our research to include emerging trends and uptake of new technologies. Please get in touch at research@retailx.net. We look forward to hearing from you. ■

Thank you

Our thanks go to our title sponsor, Tealium, for helping us to bring our insights and findings in this report to professionals working in ecommerce and multichannel



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