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UK Growth 2000

2021 Report

A performance-based assessment of
ecommerce and multichannel retailers

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INTRODUCTION

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The Growth 2000 2021 report brings fresh insights into the way retailers have raised their ecommerce performance at a time when shoppers are doing more of their shopping online. It's now clear that the huge shift online over the last year and a half during successive Covid-19 lockdowns has made buying over the internet a regular habit, including those who previously hadn't bought online. The likely legacy of this shift is that customers will continue to buy more online than they did before the pandemic, yet with this upsurge comes a range of fresh challenges for those who serve them. Throughout this report, we consider how retailers are rising to those challenges.

This report offers a full list of the 2,000 retailers selling in the UK that follow the RetailX Top500 (published in January) and names the leading 25 retailers in each of four growth-focused Dimensions – Find, Mobile, Delivery and Checkout. The Dimensions reflect the four key drivers of growth, moving from customer acquisition – at the point of being found, while also enabling shoppers to find the item they want to buy on the website – through to offering the mobile and multichannel services that shoppers now want to use. Competitive delivery and returns promises, along with a fast checkout experience, make buying online the easy option for time-pressed shoppers.

This fourth annual report maps the improvements that retailers in this index have made over the last year and more – as well as the areas where performance has taken a backwards step in the face of Covid-19 and Brexit-related challenges. It is designed to help retailers benchmark their own performance in digital commerce as they grow. We illustrate our metrics with case studies that show what retailers that lead in each of the four Dimensions are doing to stand out. Throughout, we use RetailX graphics to illustrate our findings. Those graphics are available to reuse under licence and we encourage you to do so.

We look forward to your feedback.

Ian Jindal, CEO & Editor-in-Chief, RetailX

RESILIENT TRADING IN CHALLENGING TIMES

While Growth 2000 retailers have faced many challenges in recent years, the evidence is that their performance continues to improve

The context in which Growth 2000 retailers sell has changed enormously in recent years. This year's list comes as the Covid-19 pandemic continues through its second year, although vaccination campaigns do mean that trading restrictions and lockdowns are hopefully behind us. Some retailers have also found it harder than before to sell overseas as a result of the changed trading arrangements that the new, post-Brexit trade deal with the European Union brought in January.

These factors have made for testing times, as have labour shortages and shipping and supply chain delays. Additionally, retailers are still adapting to UK shoppers buying more online than they did before the pandemic. Footfall in stores, while now approaching pre-pandemic levels, remains lower.

Despite these problems, many retailers are rising to the challenges by developing new ways of working and selling.

Who are the Growth 2000?

The retailers in the fourth annual Growth 2000 list are the 2,000 retailers that follow the RetailX Top500, published earlier in the year. With the large size of this list comes a wide range of retailers, from international businesses serving the UK to specialists serving niche audiences. The list includes international beauty brands such as Givenchy and Nivea and technology brands such as Nokia, Oculus and Xerox Corporation but also fashion names such as Valentino, Balenciaga, Anya Hindmarch and the Savile Row Company. Cultural institutions such as the National Trust Shop, the Natural History Museum Shop and the National Galleries Scotland feature. Niche specialist retailers, from the Ethical Superstore and Hygiene Supplies Direct to UK Juicers and The Underfloor Heating Store also appear.

The largest group of UK Growth 2000 2021 retailers primarily sells fashion (24%), followed by those selling consumer electronics (13%) and sports and leisure goods (12%). Fewer than 10% sell in a range of categories (6%), DIY (5%), hobbies or cosmetics (both 4%). Almost a third (32%) sell other products.

Some 62% of the Growth 2000 are primarily retailers, 35% are brands – which predominantly sell their own-label products – and 3% are marketplaces. Retailers win 57% of UK web traffic to UK Growth 2000 websites, brands 27% and marketplaces outperform with 9%.

The effect of Covid-19

More than six months since the last Covid-19 lockdown, UK retail seems to be moving on from the store closures and trading

restrictions that characterised the first year of the pandemic. The latest UK retail sales report, from the Office for National Statistics, suggests that 28.1% of UK retail sales took place online in September 2021^[1] – up from 19% in pre-pandemic February 2020. A quarter (24.9%) of non-food sales took place online – including 27.7% of clothing, footwear and textile sales, and 24.8% of household goods sales – as did 10.6% of food sales.

At the same time, footfall is starting to head back towards pre-pandemic levels. In October 2021, according to British Retail Consortium/Sensormatic IQ data^[2], UK footfall was 13.7% lower than it was in October 2019. That represents a 3.2 percentage point (pp) improvement from September.

So footfall is moving back towards normal while online shopping levels remain higher than before the pandemic. It seems likely that shoppers will continue to do more of their shopping online post-pandemic. It also seems likely that retail parks – where footfall in October 2021 was 0.4% lower than in October 2019 – will benefit, thanks to the convenience of the location for online shoppers collecting orders, while the number of visitors to shopping centres (-33.6%) and high streets (-18.3%) still remain much lower than pre-pandemic. The trend towards working from home still benefits suburban locations and towns above the centres of large cities.

Growth 2000 2021 retailers, which are predominantly online-only retailers, are likely to have benefited from the consumer shift towards shopping online. But many will have suffered from the fallout of Brexit.

The Brexit effect

The Brexit referendum may now be five years ago but the UK/EU trade deal that set out the post-Brexit trading agreement came into place only in January 2021. As a result, the way that UK businesses trade with the EU has changed. The deal is a no tariff, no quota one, yet there is now new bureaucracy when it comes to importing and exporting to the EU. This includes new forms to meet new rules of origin, which apply when UK retailers export to the EU products either partly or wholly made in a third country. Six months into the new arrangements, a ChannelAdvisor study^[3] found that 94% of brands questioned in a survey of 304 ecommerce brands had lost EU customers, while 66% had lost a significant number. Trade between Great Britain and Northern Ireland has in particular become more difficult, since Northern Ireland has remained part of the EU Single Market, while Great



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Cultural institutions including the Natural History Museum shop feature on the list

Britain is now a third country.

While larger Top500 retailers can afford to take measures such as opening warehousing within the EU that avoid the new rules, this option is less likely for many Growth 2000 retailers.

Retailers are also suffering from issues that have a variety of causes. Covid-19, global energy shortages and Brexit have combined to cause supply chain delays and labour shortages.

The resilience of Growth 2000 retailers

Despite these challenges, Growth 2000 retailers are proving resilient. RetailX research measures the index value of all companies' performance in its assessments. It finds that in 2021, the performance of the overall index has improved by 17%. That's an improvement of 21pp since 2020, when it had fallen by 4pp on the previous year. Performance is ahead of previous years in the Mobile, Delivery and Checkout Dimensions but slightly behind in the Find Dimension.

This suggests that Growth 2000 retailers have made steady improvements to their online performance despite the long list of recent challenges. It also suggests that retailers may have invested at a time when shoppers shifted further online.

In 2019, Growth 2000 research found that 5% of retailers had iOS apps and 4% Android apps. In 2021, 13% have iOS apps and 12% have Android. The percentage of retailers offering collection has gone from 13% to 18% over the same comparison period, with the median retailer now offering pick-up in 43 hours – down from 48 hours in 2019. Delivery, however, has got slower, likely amid pandemic logistics pressures. Next-day delivery is now offered by 38%, down from 40% in 2019. At the same time, the median returns period has lengthened to 25 days,

from 21 days in pre-pandemic 2019.

Overall, this is a picture of constantly improving performance – no doubt in response to the online shift during Covid-19. The fact that a greater share of UK shopping now takes place online appears to have encouraged investment and raised performance. Even where retailers have in some areas stepped back from previous fulfilment promises, relatively short term issues seem to be at play.

It is likely that in future, retailers will continue to grow, to add multichannel services, and to perform more strongly on the Growth 2000 index as the shape of shopping settles down – and remains further online than before the pandemic.

[1] www.ons.gov.uk/businessindustryandtrade/retailindustry/bulletins/retailsales/september2021#online-retail

[2] <https://internetretailing.net/location/location/halloween-half-term-and-perhaps-christmas-bring-shoppers-back-in-store-in-october-brcsensormatic-iq-23965>

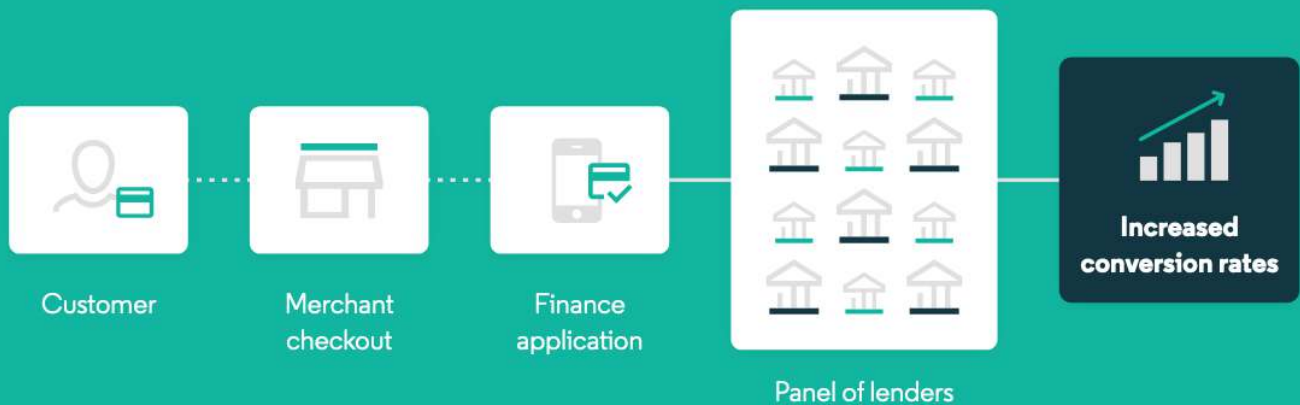
[3] <https://internetretailing.net/international/international/uk-brands-losing-eu-customers-post-brexit-even-as-direct-sales-rise-post-covid->

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HOW RETAILERS CAN MAXIMISE SALES WITH FLEXIBLE CHECKOUT FINANCE

Deko head of sales Huw Philips considers how the way we buy – and pay – has changed during the Covid-19 pandemic



How are retailers changing their payment model?

The pandemic has accelerated the shift to ecommerce by an estimated five years. Retailers now prioritise speed and convenience through ecommerce – how easy and quick it is for customers to pay, how efficiently an item is delivered and what deals are offered.

With continuing innovation and advances in payments technology, this trend is only likely to intensify.

What are the benefits of offering different payment options?

One of the main ways a business can separate itself from the competition, reach a much wider customer base, and enable existing customers to purchase more is by giving customers flexible payment options. Recent research found that nearly 9.5 million Britons have avoided buying from retailers that don't offer buy-now-pay-later (BNPL) options at the checkout. This represents a significant amount of lost income for those UK-based retailers who don't offer more ways to pay so addressing this should be a top priority for every retailer.

How can businesses ensure they don't miss out on sales?

By putting payment processes in place that will maximise the chances of customers purchasing through checkout finance. But using the right provider is critical. Working with a checkout finance partner such as Deko gives businesses access to a wide range of finance options, that go beyond the traditional buy-now-pay-later products and translate across sectors and basket sizes.

What is Deko's proposition?

Deko is a multi-product, multi-lender checkout finance solution. Knowing that single lenders will have varying levels of sector or risk appetite, Deko partners with multiple lenders to ensure the best match for the customer, retailer, and lender. This approach (which runs at the speed of a "click") increases the acceptance rate and basket range that can be covered and gives retailers

confidence they will make the sale and that the consumer can make the payment. In fact, many of the businesses we work with benefit from up to a 30% increase in sales after integrating our multi-lender platform into their checkout process.

What are the different payment options Deko offers?

Deko offers a range of options, from small basket repeat spend to personalised repayment plans and bigger loan ticket facilities more suitable for purchases in the thousands. This includes purchases up to £25,000 instore and online, so put simply, we can finance any basket, anytime, anywhere. Each of these options has its own advantages, but importantly they give customers more flexibility and ensure that there are more sales at checkouts and businesses can capture more market share.

What do retailers need from their checkout finance partners to boost sales?

Every merchant is unique and requires its own unique service. Checkout finance can undoubtedly improve merchant revenue, but it needs to be responsive to the different needs of merchants and consumers alike. This is where a multi-product service becomes crucial. Traditional buy-now-pay-later services work for some merchants, but a one-size-fits-all approach is not always effective and can be restrictive depending on the type of merchant. At Deko we work closely with our merchant partners to understand their needs and ensure that we put them in the best position to capture as many sales as possible and can be up and running with new businesses in just 24 hours.



Deko is a leading point of sale finance platform in the UK. Designed from the ground up for automated online lending, Deko provides services to lenders and merchants to enable them to instantly offer credit as a payment option across all sales channels. Deko has on-boarded over 1700 merchants and works with a growing number of lenders, including Zip, Snap and NewDay, to provide merchants and customers with simple, easy and accessible finance.

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THE NEW ECOMMERCE ERA IS ALREADY HERE — IS YOUR BRAND PREPARED?

Vladi Shlesman, managing director, EMEA at ChannelAdvisor, is looking ahead to a decade of growth



By now we have all read far too many opening paragraphs remarking on the recent turbulence that the retail industry has faced. Looking ahead is far more interesting, as this period has set the tone and direction for the next decade of ecommerce growth. Businesses selling online enter 2022 with a newfound confidence in their own growth and a determination to exert more control and creativity in

how they meet the needs of customers.

Recent ChannelAdvisor research into consumer habits found that customers have indeed become more savvy around e-commerce, with more than half still shopping online more frequently than they were in 2019. However, this also means that they are all too aware that there's an enormous number of sales avenues available to them and they're ready to take advantage.

There are more platforms and marketplaces than ever for retailers and brands to sell through, with increasingly customisable and complex options. Retailers and brands should prioritise those that work best for them. Build a list of the most suitable marketplaces for your company, researching price points, brand positioning against competitors and category-specific options. Fulfilment support will be particularly important for those expanding into a new territory. Frequently adapt listings to observe which changes improve visibility and performance and watch customer reviews carefully, as they often point to information that would be helpful in product titles or descriptions.

As supply chain issues continue, the newly-savvy online shopper shouldn't be taken for granted and companies that can't provide a product in a timely fashion will see customers eagerly spend money with a competitor. 8 in 10 consumers told us that their first reaction to an out-of-stock item would be to purchase a similar product from a different brand. Businesses may find it difficult to predict global supply chain issues but they can look to mitigate damage by continually reviewing monthly previous sales trends to identify top sellers and evaluate new styles or product lines that may be popular at different points of the year.

We also saw a stark contrast in social media appeal between the ages and it's clear that those companies looking to motivate younger shoppers to purchase will need to prioritise these channels accordingly. Just 26% of all UK consumers say they have purchased products online after seeing Instagram advertisements, sponsored content or posts over the last 12 months — however, this rises to 61% among UK 18-25 year olds and 50% among 26-35 year olds. Similarly, just 29% of all UK shoppers say they have researched products on Instagram over the last year, but this increases to 68% for 18-25 year olds and 54% for 26-34 year olds.

Ecommerce will only become noisier. Eight in 10 (80%) brands we consulted last year say their digital marketing spend is higher than pre-Covid levels and 91% expect their digital ad spend to increase further next year. Brands and retailers need to approach the future with measured preparation, as well as excitement. Yes, recent turbulence has supercharged the ecommerce opportunity — but businesses must carefully plan how to seize it.



ChannelAdvisor is a leading multichannel commerce platform whose mission is to connect and optimise the world's commerce. ChannelAdvisor helps brands and retailers worldwide improve their online performance by expanding sales channels, connecting with consumers across the entire buying cycle, optimising their operations for peak performance, and providing actionable analytics to improve competitiveness.

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WHY AN MVP APPROACH IS ESSENTIAL FOR RETAIL SUCCESS IN 2022

Alexander Graf, co-founder and co-CEO of Spryker Systems, explains why speed is a key ingredient for retailers to thrive



Retailers will look back at 2020 and 2021 as the years that changed the industry forever. The pandemic has completely transformed the market, and now the expectation is that we can order online or shop in-store. We want our items delivered in record speed, or available through Click&Collect in a matter of hours - and, we demand a seamless customer experience, no matter what

touchpoint brought us there in the first place.

While many retailers, mostly brick and mortar stores, suffered terrible losses from the lockdowns and social distancing rules, the ecommerce space witnessed exponential growth. The year-on-year ecommerce retail growth share grew on average 4.5 times in the UK in 2020, as compared to the same period 2015-2019 (McKinsey 2021). This means that while it would be remiss to ignore the damage done, it's important to focus on the future and the opportunities available for retailers in the digital commerce space.

We've all heard that the Covid-19 pandemic has caused the ecommerce industry to jump forward a decade in terms of evolution. But what does this mean for retailers? Simply put, it means that the industry is changing rapidly, and businesses must be agile and willing to implement new sales channels or business models, and adopt a 'test and learn' mindset if they want to survive.

At Spryker, we aim to help retailers achieve this agility through an MVP approach - meaning 'Minimum Viable Product'. Getting an application or service to MVP level is the way enterprises create products that have just enough features to attract early adopters, providing the feedback needed to forge ahead or abandon a product early on in its development cycle - before investing too heavily. This approach means businesses can launch new products or services, or enter new markets in a matter of weeks, not months or years. By reacting quickly to market demands, businesses are able to stay agile and really listen to customers and what they want.

One great example from our own customers is Toyota Germany. They were hit hard by the lockdowns, and approached Spryker to help them create a B2B2C online catalogue for dealers to showcase their products online while dealerships remained closed. Jens Brech, director customer experience and network quality at Toyota, says: "We needed a solution now, but the expectation was we would get a solution in two or three months, which in normal times was very fast

for us, but not acceptable in the crisis. Nonetheless, we were able to switch on the new vehicle stock locator on our website in three weeks, which was unbelievable."

By adopting this MVP approach through Spryker technology, Toyota was able to keep that all-important communication line open between dealers and customers during a difficult retail period.

Going into 2022, retailers must keep speed at the top of their agenda, with markets and expectations developing at the accelerated pace that they are. To differentiate from competitors and stay ahead of market developments, businesses need to be able to act and adapt fast, and to continuously test new ideas, features, touchpoints or entire business models to continuously improve their digital offering without lengthy delays - so, when launching a new product or testing the waters in a new market, always consider the MVP approach.



Spryker

Founded in 2014, Spryker enables companies to build sophisticated transactional business models in unified commerce including B2B, B2C, and Enterprise Marketplaces.

Spryker solutions have empowered 150+ companies to manage transactions in more than 200 countries worldwide. Spryker is trusted by brands such as Toyota, Siemens, Hilti, and Ricoh. Spryker was named the most innovative and visionary of all new vendors in the 2020 Gartner Magic Quadrant for Digital Commerce and named a major player in B2B e-Commerce by IDC and is the only commerce platform to provide full B2B, B2C, D2C, and Marketplace capabilities out of one stack.

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THE RETAILX UK GROWTH 2000

These are the UK retailers and brands that follow the RetailX UK Top500, in alphabetical order within performance clusters. Clusters are based partly on Footprint – retailers' size and significance by revenue, web traffic and stores – and mostly on performance in the four Dimensions of Find, Delivery, Mobile and Social

Top50	Top150					
ACNE STUDIOS	ALPKIT	JJ'S HOUSE	TEAPIGS	BLOOM & WILD	CRUCIAL	FUNKYPIGEON.COM
ALLSOLE	ARC'TERYX	JOLLYES	TRUFFLESHUFFLE	BLOOMING	CULT FURNITURE	FURNITURE IN FASHION
AMARA	ASTLEY CLARKE	JURA WATCHES	TYPO	ARTIFICIAL	CURRENT BODY	GEEKBUYING
AMBROSE WILSON	AUDIOVISUAL ONLINE	KALEIDOSCOPE	VERTBAUDET	BLUEBELLA	CURVISSA	GEOX
ATOM RETRO	AVEDA	KIPLING	THE WINE SOCIETY	BOBBI BROWN	CVP	GIANT BICYCLES
BOX.CO.UK	B&H PHOTO VIDEO	LA PERLA	WOLF & BADGER	BODUM	CYBERPOWER	GINGER RAY
THE CAMBRIDGE SATCHEL COMPANY	BEAUTY EXPERT	LEDKIA	XS STOCK	BONPRIX	CYCLOSTORE	GO GROOPIE
COGGLES	BERGHAUS	LENSTORE	ZATU	BOOHOMAN	DAISY LONDON	GO SMOKE FREE
CRUISE	BLUE TOMATO	THE LIGHTBULB COMPANY	Top500	THE BOOK PEOPLE	DELONGHI	GOLFBASE
DEMON TWEETS	BOOKDEPOSITORY.COM	LOOKAGAIN.CO.UK	31DOVER	BOROUGH KITCHEN	DERAMORES	GORGEOUS SHOP
EMMA BRIDGEWATER	BOTTEGA VENETA	LOVEHONEY	365GAMES.CO.UK	BREITLING	DERMLOGICA	GRAHAM AND BROWN
EXANTE DIET	BRASTOP	LYLE & SCOTT	4OURHOUSE	BRITISH CORNER SHOP	DESENIO	GRATTAN
FASHION NOVA	BUYTSHIRTS ONLINE	MANKIND	ACE & TATE	BROOK TAVERNER	DESIGNERSGUILD	GREAT LITTLE TRADING COMPANY
FASHION WORLD	C.GARS	MASTER OF MALT	ADDNATURE	BROWN BAG CLOTHING	DHGATE.COM	GREAT OUTDOORS
FOOTPATROL	CARTRIDGESAVE.CO.UK	MILITARY 1ST	ADOLFO DOMINGUEZ	BROWNS FASHION	THE DIAMOND STORE	GRINDSTORE
GAK	CASADELLIBRO.COM	MOONPIG	AIRSOFT WORLD	BULLIONBYPOST	DIAMONDS FACTORY	HANDLES4U
GROUPON	CCL COMPUTERS	MR MEMORY	ALEXANDER MCQUEEN	BUNCHES	DISNEY	HARRISON CAMERAS
HEINNIE HAYNES	CHI CHI	MYBAG	ALLBEAUTY	FLORAPOST	DJKIT.COM	HARTS OF STUR
I SAW IT FIRST	CHURCH'S	NATIVE	ALLEGRO	BUYAGIFT	DOBELL	HDEW CAMERAS
IL GUFO	CRAGHOPPERS	SKATESTORE	ANGLING ACTIVE	BUYAPARCEL	DONALD RUSSELL	HERSCHEL SUPPLY CO
IMPERICON	CROCUS	NATURAL BABY SHOWER	ANIMAL	BUYSPARES	DRINK STUFF	HIFIX
IN THE STYLE	DISCOUNT SUPPLEMENTS	NEAL'S YARD REMEDIES	ANN'S COTTAGE	BUYWHOLEFOODS ONLINE.CO.UK	DSQUARED2	HIGH & MIGHTY
IWOOT	DUKE OF UKE	NEVERFULLY DRESSED	ANTLER	CAMBRIDGE AUDIO	E-INFINITY CAMERA STORE	HOMEDICS
KATE'S CLOTHING	EMPIK.COM	OLDRIDES & DOWNTOWN	ARMANI EXCHANGE	CANTERBURY	EFLORIST	HOUSEOLOGY
LIBERTY LONDON	ESCAPADE	ORLEBAR BROWN	ASTRID&MIYU	CARE CO	ENDURA	HOWE TOOLS
MARC DARCY	ESCENTUAL	PANERAI	ATKINSONS BULLION	CARHARTT	ERIC DRESS	HOWIES
MENNACE	FIGLEAVES.COM	PINK CLOVE	ATTITUDE CLOTHING CO.	CARTRIDGE PEOPLE	ETHICAL SUPERSTORE	HUMAX
MICRODREAM	FIND ME A GIFT	PREZZYBOX	AUDIO AFFAIR	CARTRIDGE SHOP	EVAQ8	HYGIENE SUPPLIES DIRECT
MOTEL	FIRST CLASS WATCHES	PROFESSIONAL MUSIC TECHNOLOGY	AXPARIS	CASTORE	EVERLANE	HYPERDRUG.CO.UK
MY VITAMINS	FITFLOP	PURE COLLECTION	BABI PUR	CHANEL	EXECUTIVE SHAVING	I-SELLS
NORDSTROM	FLOORING SUPPLIES	REVOLUTION BEAUTY	BABYLISS	THE CHELSEA MEGASTORE	EYEWEARBRANDS.COM	INDIGO HERBS
OLIVER SWEENEY	FREEMANS.COM	REVOLVE	BABYSECURITY	CHILLBLAST	FANCYDRESS.COM	INTERNET-INK.COM
PINK BOUTIQUE	GEMPORIA	ROCK + RUN	BALENCIAGA	CHLOË	FARMISON	JARROLD
PROBIKEKIT	GETGEARED	RUNNERINN	BARGAIN MAX	CHRISTY	FASHION EYEWEAR	JE JAMES CYCLES
LA REDOUTE	GETTHELABEL.COM	RUNNERS NEED	BEAUTYLISH	CHRONO24	FAWKES CYCLES	JOHN SMEDLEY
ROKIT	GOBLIN GAMING	RUTLAND CYCLING	BEDS.CO.UK	CLINTONS	FEEL GOOD CONTACTS	JOKERS' MASQUERADE
RUBBERSOLE	GOLFONLINE	THE SCHOOL OF LIFE	BEERS OF EUROPE	CLOSET LONDON	FETCH	JOSEPH JOSEPH
SCOTTS OF STOW	GROWELL	SCOTCH & SODA	BELLA BARISTA	COACH	FIORIELLI	JULES B
SIGMA SPORTS	HAMILTON GAS PRODUCTS	SIMPLY HIKE	BELSTAFF	COLUMBIA SPORTSWEAR	FIRE PROTECTION ONLINE	JUST BB GUNS
SKINNYDIP	HANON	SOCIETY6	BENEFIT SAN FRANCISCO	COMPLETE AQUATICS	FIREBOX	JUST FABRICS
SPARTOO	HARRY CORRY	SOPHIE ALLPORT	BERRY BROS. & RUDD	CONRAN SHOPS	FISHINGMEGA STORE.COM	JUST KAMPERS
THOMANN	HARVEY NORMAN	SOSANDAR	BETTYS	COUNTRY ATTIRE	FITNESS SUPERSTORE	LANCOME
TOOLSTOP	HOLISTICSHOP.CO.UK	SOUS CHEF	BIKESTER	COWSHED	FLATSPOT	LAND WARRIOR
TWEETS CYCLES	HONOUR	START-RITE SHOES	BILLABONG	CRAFTER'S COMPANION	FLIGHT STORE	AIRSOFT
URBAN INDUSTRY	HQHAIR	STRESSNOMORE	BIRKENSTOCK	CRAFTY ARTS	FOCUSRITE	LAPTOP OUTLET
THE WHISKY EXCHANGE	IKRUSH		BITIBA	CREATE AND CRAFT		
WOODHOUSE CLOTHING	IZABEL LONDON		BLACK CIRCLES			
ZAVVI			BLACKBURN DISTRIBUTIONS			

LAVISH ALICE	PAPERSTONE	SEWING	TRADING DEPOT	ARLO	CASTORAMA	DIRECT WOOD
LED HUT	PARK CAMERAS	MACHINES DIRECT	TROPHY STORE	ARROW	CBAZAAR	FLOORING
LEISURE OUTLET	PARTY PIECES	SHOPBOP	TRUE VINTAGE	ARTURIA	CDJAPAN	DISPLATE
LIGHTBULBS	PEDIWEAR	SHOPTO	TYRE LEADER	ASHAMPOO	CGP	DOLPHIN FITNESS
DIRECT	PEN HEAVEN	SHORE	UK JUICERS	ASQ	CHEMIST 4 U	DORMEO
LIQUID	PERFUME CLICK	SIK SILK	UK SOCCER SHOP	ASTON MARTIN	CHILDSPLAY	DOWNLOAD
LOOT CRATE	PET-	SIMPLE LIGHTING	ULTRALIGHT	AWD-IT	CLOTHING	FESTIVAL
LOUNGE	SUPERMARKET	SIMPLY SWIM	OUTDOOR GEAR	AXELOS	CHO	DRAPER
MACYS	PETER CHRISTIAN	SIMPLY	THE UNDERFLOOR	BAGS OF LOVE	CHOCOLATE	DRINKSUPER
MAGIC	PETER TYSON	SUPPLEMENTS	HEATING STORE	BAKERY BITS	TRADING CO	MARKET
MADHOUSE	PICSTOP	SJS CYCLES	UNIVERSAL	BALLICOM	CHRISTIE'S	DUMMIES
MAIL SHOP	THE PIHUT	SMYTHSON	WORKS	BANANAFINGERS	CHRISTOPHER	DUREX
MAISONS DU	PLANET X	THE SOLAR	VALENTINO	BARCODE	WARD	EA
MONDE	POETRY FASHION	CENTRE	VAMPIRE VAPE	WAREHOUSE	CLEARANCE365	EASY LIVE
MANTEL	POP IN A BOX	SOLOPRESS	VASHI	BASE FASHION	CLIFTON	AUCTION
MEDISAVE	POUNDLAND	SOURCE BMX	VERO MODA	BATTLE.NET	CAMERAS	ECOOKSHOP
MEDTREE	POUNDERHOUSE	SOUTHERN	VICTORINOX	BAX MUSIC	CLOVE	EDINBURGH
MEILLEURDUCHEF.COM	POWERHOUSE	UKULELE STORE	VONHAUS	BEADS DIRECT	COCOON CENTER	BICYCLE CO-
MERCHOID	PREMIER MAN	SPEEDO	THE WATCH	BEARMACH	COLOUR BOX	OPERATIVE
MERLIN CYCLES	PRIMROSE	STANFORDS	GALLERY	BEATS	COMMS EXPRESS	EKOSPORT
MESHKI	PRINTER INKS	STINKYINK	WEBBS GARDEN	BEAUTIFY	COMPLETE CARE	ELECTRICAL
MIKE'S DIVE	PRINTERBASE	STRENGTH SHOP	CENTRES	BEAUTY BASE	SHOP	DISCOUNT UK
STORE	PROSWIMWEAR	UK	WELLGOSH	BEBIO	COOKSONGOLD	(HARRY GARLICK)
MILLBRY HILL	THE PROTEIN	STRINGS DIRECT	WETSUIT CENTRE	BEER52	COOL	ELECTROLUX
MINIINTHEBOX.COM	WORKS	STUDIOSPARES	WETSUITOUTLET	BELKIN	COMPONENTS	ELEMENT VAPE
MISSPAP	RAWLINS	SUIT DIRECT	WHYBUYNEW	BEST PETS	COOLBLADES	ELEMIS
MISTER AUTO	RAY-BAN	SUITSUPPLY	WICKED UNCLE	BIKE-DISCOUNT	COOLER MASTER	EMERSON
MONCLER	REAL FOODS	SUNSPEL	WINSTANLEYS	BIKEINN	COPART	ELECTRIC CO.
MORECOMPUTERS	THE REFORMATION	SUPERFI	BIKES	BIKERADAR	COREL	EMMA
MOVE	REFRESH	SUUNTO	WINSTANLEYS	BLACK POOL	COTTON ON	ERGONIC
DANCEWEAR	CARTRIDGES	SWANN	PRAMWORLD	PLEASURE BEACH	COUSINS UK	DESIGNS
MUSIC MAGPIE	REI	SWEATBAND	WONDERLAND	BLENDER	CRAMPTON AND	ETYRES
MUSTO	REPLACE BASE	T.H. BAKER	MODELS	BODYBUILDING	MOORE	EVE SLEEP
NAPAPIJRI	REPTILE CENTRE	T2	WORDERY	BOKUS	CRAZY	EVERSALES
NATIONAL TRUST	RESERVED	TAG HEUER	WORKING CLASS	BONDARA	CLEARANCE	SPACE
SHOP	RGB DIRECT	TAIWANGUN	HEROES	BONHAMS	CRICKET DIRECT	EVERYONE
NATURAL HISTORY	RIBBLE	TB DRESS	WRANGLER	BOOMKAT	CULT BEAUTY	ACTIVE
MUSEUM SHOP	RICH TONE MUSIC	TECH IN THE	Top1000	BOOSTED	CULT PENS	EVERYONEDOESIT
NATURE'S BEST	RITUALS	BASKET	247 SPORTS	BOOTH	CULTURES FOR	EXPRESS
NEOM ORGANICS	RIVERFORD	TENNISNUTS	FANATICS	BRABANTIA	HEALTH	TRAINERS
NFL SHOP	ORGANIC	THEDRINKSHOP.COM LTD	3M	BRANDY MELVILLE	CYBER LINK	FANATICAL
NITROTEK	FARMERS	THOMPSON &	7DAYSHOP	BREAKER YARD	D'ADDARIO	FANATICS.COM
NORMANS	ROBOT SHOP	MORGAN	ACRONIS	BREITBART STORE	DANCOVER	FARAH
NOTEBOOKS	ROGUE	THOUGHT	ACTIVISION	BRICKLINK	DANIEL	FARM MACHINERY
BILLIGER	ROLLERSNAKES	THREAD	ADORAMA	BRILLIANT EARTH	WELLINGTON	LOCATOR
NUMBER 1 PLATES	ROSE GAL	TICKETMASTER	AFFORDABLE	BROMPTON	DARTINGTON	FARMDROP
OFFCUTS	ROYAL COLLECTION	TIMEX	MOBILES	BICYCLE	CRYSTAL	FASHIOLA
OLIVE	TRUST	CORPORATION	ALAMY	BROOKSBROTHERS	DAVID AUSTIN	FASTHOSTS
ON RUNNING	RS COMPONENTS	TJC	ALIBRIS	CABLE MONKEY	ROSES	FASTTECH
ONEPLUS	SALON SERVICES	TOG24	AMERICAN	CALUMET	DAZ 3D	FC
ONITSUKA TIGER	SAMUEL	TOKYO LAUNDRY	SWEETS	PHOTOGRAPHIC	DELTA	INTERNAZIONALE
ONLINE 4 BABY	WINDSOR	TOMTOP	ANGLIA TOOL	CAMPBELLS MEAT	DELTICOM	FENDER
OPTIMAL PRINT	SAVILE ROW	TOO FACED	CENTRE	CANNONDALE	DESIGN BY	FENWICK
OSPREY EUROPE	COMPANY	TOTALLY WICKED	ANTIQUE'S ATLAS	CANYON	HUMANS	FESTICKET
OUTDOORGB	SDS LONDON	TOWER LONDON	APHRODITE	CARDID	THE DESIGN	FESTOOL POWER
PAPERLESS POST	SELECT SPECS	TRADE COUNTER	APPLIANCE CITY	CARRIER BAG	STORE	TOOLS
	SENNHEISER	DIRECT	APPROVED FOOD	SHOP	DESIGNHILL	FINE ART
			APRICOT		DESIGUAL	AMERICA
			AQUALISA		DESINGBOOM	FIRST 4 MAGNETS
						FIRST TUNNELS

FIXXOO	HONESTBREW	LOVELL RUGBY	ONEDIRECT	RAVENS	SOTHEYB'S	UBERKINKY
FLORYDAY	HOSTGATOR	LUCKY VITAMIN	ONLINEGOLF	REAL MADRID	SPECIALIZED	UK BATHROOMS
FM WORLD	HOTLINE	LULUS	ONTHEHUB	REBELLIOUS	SPECKYFOUREYES	UK ELECTRICAL SUPPLIES
FONEHOUSE	HUMBLE BUNDLE	LYST	OPTICSPLANET	RED LETTER DAYS	SPIRAL	UK TOOL CENTRE
FOREVER LIVING	HYPE	MACUPDATE	OPUMO	REN CLEAN SKINCARE	SPORTSMAN GUN CENTRE	UK WHITEGOODS
FRAMES.CO.UK	ICEBREAKER	MAD4TOOLS.COM	ORIFLAME	REPLACEMENTS	SQUARE	UNIFI
FRED ALDOUS	ICOFINDER	MANJARO	ORIGIN	REVIVER SOFT	STAMPS DIRECT	UNION
FROM THE BOX OFFICE	ICONIC WATCHES	MARKS & SPENCER	ORIGINS	REVZILLA	STANCE	UNISPORT
FRONTIER STORE	IDEFIX	MAXICOFFEE	OSPREY LONDON	REX LONDON	START FITNESS	UP & RUNNING
FTD	IFIXIT	MERRELL	OUT AND ABOUT LIVE	RICARDO	STAX TRADE CENTRES	URBAN EXCESS
FUJIFILM	THE INDEPENDENT PHARMACY	METALS4U	OUTDOORWORLD DIRECT	RIEKER	STOCKINGS HQ	UTTERQUE
FUNCTION18	INFINITY MOTORCYCLES	MICROSOFT STORE	OXFORD PRODUCTS	RIMOWA	STOKKE	UTTINGS
GAIA ONLINE	INSTANTGAMING	MIND TOOLS	OZGRID	RINGTONS	STORE	VAGABOND
THE GAME COLLECTION	INTEL	MISTER SPEX	PACKT	ROADRUNNER SPORTS	STUBHUB	VAPEMATE
GARDENSITE	JACKSONARTS	MLB SHOP	PALACE SKATEBOARDS	ROLEX	SUNGLASSES SHOP	VARUSTELEKA
GARDENTRADING	JAPAN CENTRE	MOBILE PHONES DIRECT	PARADOXPLAZA	ROOFING SUPERSTORE	SUSHISUSHI	VELUX
GEM WHOLESALE	JAYBIRD	MOBILES.CO.UK	PARTS PEOPLE	ROSETTA STONE	SWEETWATER	VETUK
GET LAID BEDS	JIGSAW PUZZLES DIRECT	MODESENS	PARTYRAMA	ROTTA	SWELL UK	VILLEROY & BOCH
GIEVES AND HAWKES	JO MALONE	MONEY	PATROL BASE	ROYS DEPARTMENT STORE	TACKLE UK	VISIONDIRECT.CO.UK
GILT	JOHN PYE AUCTIONS	MORPHE	PAULA'S CHOICE	RS ELECTRICAL SUPPLIES	TARTE	VISIT BRISTOL
GIVENCHY	JOOM	MORPHY RICHARDS	PDSA	RSCPCA	TASCHEN	VITRA
GOODNESS DIRECT	JUST FASHION NOW	MOSCHINO	PEAK DESIGN	RUNNING WAREHOUSE	TASKERS	VOVA
GOOP	JUST FOR PETS	MOWER MAGIC	PEPE JEANS LONDON	RYOBI	TAUNTON LEISURE	THE WALT DISNEY COMPANY
GOOSE & GANDER	JUST MINIATURES	MR PORTER	PET DRUGS ONLINE	SAA	TAYLOR&FRANCIS	WATCH
GRAFF-CITY	KELLER SPORTS	MREXCEL	PET PLANET	SAATCHIART	TCGPLAYER, INC.	WATCH GEEKO
GRASS 247	KEW GARDENS SHOP	MUSCLE & STRENGTH	PETER HAHN	SAFETYLIFTIN GEAR.COM	TEACHERS PAY TEACHERS	WATCH SHOP
GRENADE	KICK GAME	MUSIC MATTER	PGA TOUR	SANDRO	TECHNO GYM	WAYLAND GAMES
GRENSON	KIKO	MUSIC ROOM	PHARMACY FIRST	SAUCONY	TEEPUBLIC	WEDDING WIRE
GRIN	KILLSTAR	MUSICA NEO	PHARMACY2U	SCIENCE IN SPORT	TEFAL	WHEELSPIN MODELS
GROHE	KINGSTON TECHNOLOGY CO.	MX5 PARTS	PHD SPORTS	SCRIBD	THE DODO	WHERE TO GET IT
GS1	KINGQUIN	NARS	PIMORONI	SELECT CAR LEASING	THE JOURNAL SHOP	WHO GIVES A CRAP
GTX GAMING	KMR AUDIO	NATIONAL INSTRUMENTS	PIONEER ELECTRONICS	SHAPEWAYS	THE LITERARY GIFT COMPANY	WILCO DIRECT
GUDRUN SJÖDÉN	KNIFE WAREHOUSE	NATIVE INSTRUMENTS	PIPINGROCK	SHERIDAN	THE RADAVIDST	THE WILD MEAT COMPANY
GUNSTAR	THE KNOT	NCC	PLANTRONICS	SHOETIQUE	THIS IS WHY I'M BROKE	WINZIP
H-KING	KRAMPTON	NEIMAN MARCUS	PLASTIC BOXSHOP	SHOPFITTING WAREHOUSE	THIS WORKS	WIPER BLADES
HALLOWEEN COSTUMES	LAS IGUANAS	NERD OR DIE	PLAYASIA	SHPOCK	THRIFTBOOKS	WITT WEIDEN
HANDLESTORE.COM	LATESTDEALS.CO.UK	NESCAFE DOLCE GUSTO	PNEUS ONLINE	SHUTTERFLY	TILE MOUNTAIN	WORLD OF CAMPING
HANDTECH	LAVAZZA	NETGEAR	POLES AND BLINDS	SIEMENS	TILES DIRECT	WWE SHOP
HARGROVES CYCLES	LEADER DOORS	NEWCHIC	POLYBAGS	SIMPLY SCUBA	TODO COLECCIÓN	XEROX CORPORATION
HARRIETT KELSALL	LEGOLAND	NEXT DAY COFFEE	POND PLANET	SIVASDESCALZO	TOFU CUTE	XUPES
HATTONS	LEXMARK	NITRADO	PONS HALLO WELT	SKATEDELUXE	TOOLDEN	YOGSCAST
HC SUPPLIES	LINDY	NIVEA	POPART UK	SKATES.CO.UK	TRACTIVE	YOINS
HERMAN MILLER	LISA ANGEL	NKUKU	POSTERLOUNGE	SKETCH	TREKBIKES	YOUNGLIVING
HEWLETT PACKARD ENTERPRISE	LITTLE MISTRESS	NOKIA	POUND WHOLESALE	SMEG	TREKKINN	YOURSPARES
HHV	LOBIT	NRS HEALTHCARE	POWER TOOL WORLD	SMOKETECH	TRIADS	ZAFUL
HOBBYSEARCH	LOEWE	NZXT CORPORATION	PRINT WORKS	SNAP ON	TROUVA	ZEN MARKET
HOME HEALTH UK	LOGMEIN	OBERLO	PRO-DIRECT	SNAPFISH	TTS GROUP	ZINIO
HOME, BEAUTY & GIFT SHOP	LOUIS MOTO	OCULUS	PURE	THE SOLE SUPPLIER	TUMI	ZIP WORLD
	LOVATTS	OH POLLY			TURBOSQUID	ZSL
		OI POLLOI			TV PLAYER	ZUMBA

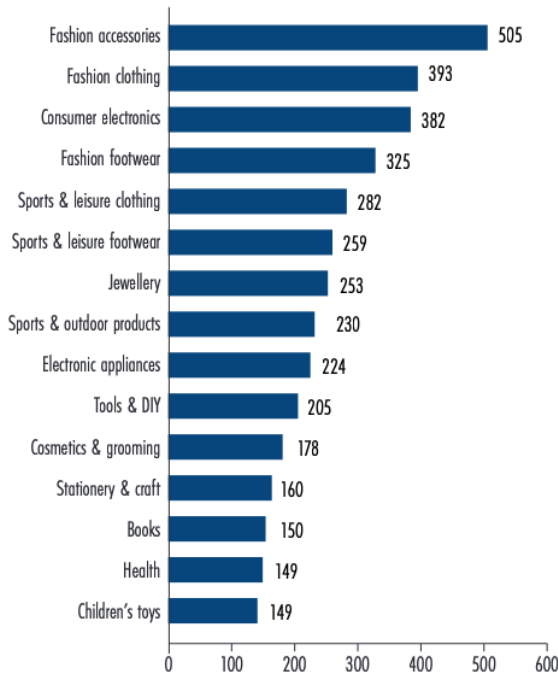
Top1500	BISSELL	COOK	EXCEPTIONAL AV	HEAVEN GIFTS	LIGHTING DIRECT	MUSIC STORE
12 VOLT PLANET	BLACK BUTTERFLY	COOMBE FARM	EYES LIPS FACE BLOG	HELLO PRINT	LIGHTS 4 FUN	MVMT WATCHES
1STDIBS	BLACK LIBRARY	COOPERS OF STOTFORD	FANCY DRESS BALL	HERRING SHOES	LILY'S KITCHEN	MX WHOLESALE
24MX	BLICK	COWLING AND WILCOX	FFX	HIVE.CO.UK	LILYSILK	MYPICTURE.CO.UK
4 IMPRINT	BLUE BANANA	COX MOTOR PARTS	FIERCE PC	HOCHANDA	LINDT	MYSTIC MOMENTS
4GADGETS	BOARDS DIRECT	CRATE & BARREL	FIRESTAR	HODINKEE	LINGERIE OUTLET STORE	MYTOOLSHED.CO.UK
80'S CASUAL CLASSICS	BOCONCEPT	CRAZY FACTORY	FISHER & PAYKEL	HOKA	LITTLE BLACK DRESS	MYTRENDYPHONE
ABSOLUTE MUSIC	BODYBUILDING WAREHOUSE	CREATION WATCHES	FISHING TACKLE AND BAIT	HOI I AND BIKF SHOP	LOAKE	NA-KD
ABSOLUTE-SNOW.CO.UK	BONANZA	CREATIVE CROWN	FJALLRAVEN	HOME AV DIRECT	LONDONCAMERA EXCHANGE	NABRU
ACE (EXPRESS GIFTS)	BOTICCA.COM	CYCLE KING	FLIGHT CLUB	THE HOME BREW SHOP	LONGACRES	NATIONAL SHOWER SPARES
ACHICA	BRADSHAW'S DIRECT	DAVID'S BRIDAL	FLOORING DIRECT	HOME LEISURE DIRECT	LONGCHAMP	NATURAL BED COMPANY
AESOP	BRANTANO	DAVPACK	FLOORING SUPERSTORE	HOPE EDUCATION	LOVE BOOK ONLINE	NATURISIMO
AFFORDABLE GOLF	BREW UK	DAWSONS	FOLK	HOT TOPIC	LOVE SKIRTING	NETATMO
AIR CON DIRECT	BREWERS	DAYLESFORD	FOLKSY	HOUSE OF BATH	LOVELL SOCCER	NEWARK.COM
AIRFIX	BROOKS	DBRAND	FORCE 4	HOUSE OF CB	LOVISA	NEWITTS
ALEXANDALEXA.COM	BROTHER2	DC SHOES	FORGEWORLD	HOUSING UNITS	LOWEPRO	NICCE
ALEXANDRA	BROTHER	DENLEY/BOLF	FR JONES AND SON	HUEL	LUGGAGE SUPERSTORE	NOA AND NANI
ALLIANCE ONLINE	BULLETPROOF	DEPOP	FRAGRANCEX	ICE HEAD SHOP	LYCO	NUDIE JEANS
ANIMED	BUY CARPETS	DESIGNER SOFAS 4U	FRANCIS & GAYE JEWELLERS	ICONIC LIGHTS	MADE IN DESIGN	OAK WORLD
ANKER	BUYABATTERY.CO.UK	DICKIES WORK WEAR	FRUGI	IRREGULAR CHOICE	MADEWELL	OCEAN LIGHTING
ANYA	BUYMA	DIGITALPRINTING.CO.UK	FUNKO	IWC SCHAFFHAUSEN	MAIDENHEAD AQUATICS	OFF-WHITE
HINDMARCH	BUYMOBILES.NET	DIRECT DOORS	FURNITURE CHOICE	JABRA	MAIL ORDER TREES	OMEGA
APPLIANCE HOUSE	BVLGARI	DIRECT HEATING SUPPLIES	FUTON COMPANY	JACK WOLFSKIN	MAJE	OMLET
ARDMOOR	CALZEDONA	DISTUBIA	THE GAA STORE	JACKSONS NURSERIES	MAMMUT	ONBUY
ARGENTO	CAMERA JUNGLE	DK	GAMESPLANET	JADED LONDON	MANCHESTER UNITED	OPONEO
ARITZIA	CAMERAWORLD	DMC	GARDEN STREET	JADLAM	MAPPIN & WEBB	ORDNANCE SURVEY
ARSENAL FC	CAMPING WORLD	DOLLS KILL	GARDEN WILD LIFE DIRECT	JELLYCAT	MARINE SUPER STORE	OUTDOOR GEAR
ART GALLEY	CANADA GOOSE	DOVER STREET MARKET	GARDENING EXPRESS	JEWELLERYBOX	MARSHALL	OUTDOOR TOYS
ARTFINDER	CAR PARTS 4 LESS	DOWNLIGHTS	GEARPATROL	JOSEPH	MASTERSHOE	THE OUTNET
AWESOME BOOKS	CARETHY	DOWNSING & REYNOLDS	GETTING PERSONAL.CO.UK	JUST VITAMINS	MATTRESS MAN	OZON
BANANA MOON	CARTRIDGE DISCOUNT	DRESS INN	GHOST LONDON	KARRIMOR	ME+EM	PACKAGING2BUY
BANDCAMP	CASETIFY	DRIFT WORKS	GILLETTE	KEEN	MEDEXPRESS	PAC SUN
BASE.COM	CASIO	DWELL	GLOSSIER	KEF	MERLIN ARCHERY	PADDOCK
BATTERY STATION	CAT CHAT	E-BIKESHOP	GOGGLES4U	KENABLE	MICRO SCOOTER	PANAMOZ
BBQ WORLD	CD UNIVERSE	E2SAVE	GRAILED	KENWOOD	MIELE	PARROT
BEAUTIFUL HALO	CHARLOTTE TILBURY	ELECTRIC TOBACCONIST	A GREAT READ	KICKERS	MISSOMA	PARTMASTER
BEDECK	CHIC WISH	THE ELECTRICAL SHOWROOM	GREENFINGERS	KIDDIES KINGDOM	MISSY EMPIRE	PARTS EXPRESS
BEER HAWK	CHISHOLM HUNTER	THE ELECTRONIC CIGARETTE COMPANY	GSF CAR PARTS	KING AND MCGAW	MOBILE FUN	PAST BOOK
BEER MERCHANTS	CHRISTIES DIRECT	ENVIROPHONE	GYM KING	KITLOCKER.COM	MODA OPERANDI	PATAGONIA
BELLE LINGERIE	CHUMS	EUROFFICE	HARMAN	KLARSTEIN	MODANISA	PC SPECIALIST
BEN SHERMAN	CIRCULON	EVIKE	HARPER COLLINS	KNIFECENTRE	MONSTER PET SUPPLIES	PCCOMPONENTES
BENUTA	CLAINS	EVOLUTION VAPING	HARRY'S	KITCHEN DOOR WORKSHOP	MORGAN COMPUTERS	PEACH GUITARS
BETTER BATHROOMS	CLEARANCE KING		HEALTHSPAN	KUSTOM	MOTOCARD	PENHALIGON'S
BETTER WORLD BOOKS	CLOTHES2ORDER		HEALTHY SUPPLIES	LABIRINT	MOUS	PERSONALISED GIFT SHOP
BIG BATHROOM SHOP	CLUBHOUSE GOLF			LAMP AND LIGHT	MOUSER	PHYSIOROOM
BIG DUG	CONSORTIUM			LAMPSHOP ONLINE	MPB.COM	PHYSIQUE
BILD SHOP	CONTACT LENSES			LEAP FROG	MR CENTRAL HEATING	PIERCING MANIA
BIOVEA	THE CONTAINER STORE			LI GO	MUD JEANS	PIPER'S FARM
BISCUITEERS						PIXIBEAUTY
						PLAYSTATION STORE
						PLUGIN BOUTIQUE

POLSKA	SASS & BELLE	TEMPTATION	WOOLOVERS	BATHROOM	CHARLES & KEITH	DOOR
KSIEGARNIA	SAXOPRINT	GIFTS	WORLD'S END	SPARE PARTS	CHERRY RED	SUPERSTORE
INTERNETOWA	SCALE MODEL	TENNIS POINT	MOTORCYCLES	BB GUNS 4 LESS	RECORDS	DOVES FARM
POPCULTCHA	SHOP	TENNIS	WORWEAR	BEATPORT	CHILLY'S	DOWLIGHTS
POPPY SHOP	SCIENCE	WAREHOUSE	EXPRESS	BED FACTORY	CHILTERN SEEDS	DIRECT
PORTMEIRION	MUSEUM SHOP	TERRY FABRICS	WRAPPZ	DIRECT	CHINA SEARCH	DRAINAGE
POSTURITE	SECRET LINEN	THE GOODBOOK	WURTH	BFD WORL D	CHINA VASION	SUPERSTORE
POWER BODY	SECRET SALES	THE JEWEL HUT	XBOX	BEDSTAR	CHOICE	DRINKS DIRECT
POWER TOOLS UK	SEE TICKETS	THE LIGHTING	XL MOTO	BELLA	CHRISTIAN BOOK	DULUX
PRC DIRECT	SEED STUDIO	COMPANY	YES ASIA	BATHROOMS	CLASSIC	DURACELL
PREDATOR	SEIKO	THE SAFETY	YMC	BELLROY	FOOTBALL SHIRTS	DIRECT
NUTRITION	SERVERSDIRECT	SUPPLY COMPANY	YOU GARDEN	BIBLIO.COM	CLICKMEETING	E BIKES DIRECT
PRESENT FINDER	SGS	THE RIDGE	YUMBLES	BIG BUY	CLOS19	E VITAMINS
PRESTIGE	SHADE STATION	THREADLESS	ZAMNESIA	BIGBADTOystore	CNS	E-CRATER
FLOWER	SHAVERS	TILE	ZOOM.CO.UK	BLACK COUNTRY	CONCEPT2	EAGLE MOSS
PRETAVOIR	SHEDSTORE	TILE GIANT	Top2000	METALWORKS	COUNTY GOLF	EDE &
PRINCESS POLLY	SHEET MUSIC	TLC ELECTRICAL	1ST CHOICE	BLACK DIAMOND	COUVERTURE	RAVENSCROFT
PRINTERLAND.	PLUS	SUPPLIES	247CURTAINS	BLAKELY	AND THE	EIL
CO.UK	SHOEAHOLICS	TME	4 GON	BLINKIST	GARBSTORE	ELECTRONIC
PUBLIC DESIRE	SILKFRED	TOM DIXON	4D MODEL SHOP	BMJ ON	CRAFT GIN CLUB	WORLD
PURL SOHO	SIMPLY BEACH	TONY'S TEXTILES	A.P.C.	EXAMINATION	CRAFTING	ELGATO SYSTEMS
QUOOKER	SIMPLY WIGS	TOOLED UP	ABCam	BOBCO TACKLE	CRAFTS U PRINT	ENEBA
QWERTEE	SIPSMITH	TOTAL FISHING	ACEFITNESS	BOBS WATCHES	CRICKET	ENGELBERT
RAB	SITEBOX	TACKLE	ACER	BODYKIND	AUSTRALIA	STRAUSS
RAINS	SIZZIX	TRADERA	ACTIVITY	BONSAI EMPIRE	ONLINE SHOP	ENTS24
RALEIGH	SJA	TRAPSTAR	SUPERSTORE	THE BOOK OF	CROFT MILL	EPOS NOW
RANSOM SPARES	SK:N CLINICS	TREKITT	AGRIGEM	EVERYONE	CRUMBS	EQUI4WORK
RAPANUI	SLIM'S	TWO SEASONS	ALAN H.	BOOMF	BREWING	FREPI ACFMENT
RATTAN DIRECT	SLRHUT	ULTIMATE	SCHOFIELD	BRADFORD	CURTAINS	PARTS
THE REALREAL	SMARTBUY	OUTDOORS	ALL POND	BRADFORDS	CURTAINS	EVERPRESS
RECORDSTORE	GLASSES	VAN MEUWEN	SOLUTIONS	BRAKE	CURTAINS	EVERSFIELD
RED JUICE	SMARTFONE	VANISHING INC	ALL YOU CAN	BREWD OG	2GO	ORGANIC
REIDYS MUSIC	STORE	VAX	BOOKS	BRISTOL	CUSTOMINK	EVGA
REPRESENT	SNAINTON GOLF	VEJA	AMERICAN FIZZ	CAMERAS	CYTOPLAN	EXPRESS
RHS	SNOWINN	VIAGOGO	ANALOG DEVICES	BRITA	CELINE	CHEMIST
RICHARD	SOAK & SLEEP	THE VISOR SHOP	ANCIENT-ORIGINS	BROTHER	D.T. BROWN	FC BAYERN
HAWORTH	SOFOLOGY	VITA COST	AOS ONLINE	BUILDING	DAMART	MUNICH
RINKIT	SOHOHOME	VIVO BAREFOOT	APC	MATERIALS	DANCEDIRECT	FERM LIVING
RIVERSIDE	SOLDIER OF	VOGUE	ARBONNE	BUY SHEDS	DARE 2B	FIELD & FLOWER
ROALDDAHLSHOP	FORTUNE	VONSHEF	ARCHIPRODUCTS	DIRECT	DARTS CORNER	FIRE SUPPORT
ROBERTS	SONIC DIRECT	WARDOW	ARUBA	C. P. HART	DAYSOFT	FIRMOO
ROBINSONS	SOUNDS TRUE	THE WATCH HUT	ASDA TYRES	CAFEPRESS	DE GRUYTER	FLYING FLOWERS
BREWERY	SPEX4LESS	WATCHES2U	ASHRIDGE TREES	CALIROOTS	DECORATING	FOOTWAY
ROCKETT ST	SPORTS HQ	WEBER	ASHWOOD	CALLAWAY GOLF	DIRECT	FORMLABS
GEORGE	SPURS SHOP	WESTEND DJ	NURSERIES	CANCER	DEDEMAN	FORMULA ONE
ROCKLER	SSENSE	WESTERN DIGITAL	ASTON VILLA	RESEARCH CENTER	DEEJAY.DE	AUTOCENTRES
ROUTLEDGE	STERLING	WHISKY SHOP	AUDIO-TECHNICA	CANDLE SHACK	DEL CAMPE	FOUNDRY
ROXY	FURNITURE	WILKINSON	AV PARTS MASTER	CAR AUDIO	DENBY	FOX RACING
RSPB	STEW MAC	WINDIELDS	AXEL ARIGATO	CENTRE	DESIGN CUTS	FRAMES DIRECT
RX SPORT	STORENVY	OUTDOORS	BACKSTREET	CAR SHOP	DIPTYQUE PARIS	FRENCH
S3I GROUP	STRAWBERRY	THE WINDOW	MERCH	CARLUCCIO'S	DISCOUNTFOOT	BEDROOM
SAGE BOOKS	STÜSSY	FILM COMPANY	BANANA PRINT	CATAWIKI	BALLKITS.COM	FROM JAPAN
SALTER	SVP.CO.UK	WLED	BARCODESINC	CCLEANER	DIYA	FULLY CHARGED
SALVATORE	SWAN	WOOD FINISHES	BARGAIN	CENTRE OF	DM'S GUILD	FUN BIKES
FERRAGAMO	SWOON EDITIONS	DIRECT	HARDWARE	EXCELENCE	DOBIES	FURNITURE
SAM TURNER	TAPI CARPETS	WOOL AND THE	BASS CENTRE	CERAMIC TILE	DOLLAR SHAVE	FACTOR
SANCTUARY	TASSIMO	GANG	BATHROOM CITY	DISTRIBUTORS	CLUB	G2A.COM
BATHROOMS	TECH21	WAREHOUSE				GAMES LORE
SARAH RAVEN						GANNI

GARDENING DIRECT	IRON MAN	MDP	ONNIT	REBELLE	SPEEDY SERVICES	TOONTRACK
GARDENBARGAINS	J & S	MERCHBAR	OPEN STUDY COLLEGE	REDWOLFAIRSOFT	SPICES OF INDIA	TOPHATTER
GARDEN4LESS	J. PARKERS	MICKS GARAGE	OPTIMUM NUTRITION	REGTRANSFERS.CO.UK	SPOONFLOWER	TORYBURCH
GARDENS 4 YOU	JACKSONS LEISURE SUPPLIES	MIGHTY DEALS	ORIGIN FITNESS	REMINGTON	SPORT CONRAD	TOWSURE
GEIZHALS	JACQUIE LAWSON CARDS	MILK&MORE	ORNAMENTAL TREES	RICK STEIN ONLINE SHOP	SPORTS GUNS	TREND
GIBSON	JAMES ALLEN	MINDFUL CHEF	OTTOLENGHI	RIMMERS MUSIC	STACKSOCIAL	TRÈS BIEN
GLADIATOR COMPUTERS	JANE CLAYTON & COMPANY	MIRRAW	OXFORD ONLINE PHARMACY	ROAD ANGEL	STADIUM GOODS	TRITON SHOWERS
GLAMIRA	JEFFREE STAR COSMETICS	MOUNTAIN EQUIPMENT	PACT COFFEE	RONNIE SCOTTS	STARBIKE	TROPIC
GO GRAPH	JET PENS	MORE	PAIZO	ROOF BOX	STERLING BUILD	TSHIRT STUDIO
GOAT	JEWELLERY MAKER	MORPLAN	PAKAMERA	ROSE WE	STICKER MULE	TUTOR 2 U
GOLF BIDDER	JIM LAWRENCE	MOSS EUROPE	PANTONE	ROSELAND FURNITURE	STOCKX	TWININGS
GOLF SUPPORT	JOHN SMITH'S	MOTOROLA	PARAMOUNT PLANTS	ROTARY WATCHES	STONE ISLAND	TYLKO
GRASS DIRECT	JUVENTUS FOOTBALL CLUB	MSC	PARTS GATEWAY	ROUTE 1 PRINT	STOVE AREUS	TYRE SHOPPER
GREAT MAGAZINES	KITE PACKAGING	MUSIC STACK	PASTA EVANGELISTS	ROYAL QUEEN SEEDS	STREETSHIRTS	TYRESONTHE DRIVE.COM
GREY HAZE	KITH	MY APPLIANCES	PAULS CYCLES	RUBY LANE	STYLE KOREAN	UK TACTICAL
GUJAR.CO.UK	KPOP TOWN	MY BED FRAMES	PEGGS AND SON	RUSSELL HOBBS	SUMMER GARDEN BUILDINGS	UNCOMMON GOODS
HALLMARK	KWIK FIT	MY CHEAP LAPTOP	PEOPLE TREE	SALONS DIRECT	SUPERBUY	UNIVERSE
HANNANTS	LA SENZA	MY ONLINE TRAINING HUB	PERCIVAL	SAM HARRIS	SURPLUS & OUTDOORS	URBAN RIDER
HAPPY BEDS	LABEL PLANET	MY TICKET	PETER BEALES	SANS	SUZUKI	V&A SHOP
HAPPY SOCKS	LAMBDATEK	NATIONAL GALLERIES SCOTLAND	PETSPYJAMAS	SAPPHIRE	SWEATSHOP	VAPE STORE
HARRISONS	LATEST IN BEAUTY	NATIONAL GARDEN SCHEME	PF JONES	SAVE WATER SAVE MONEY	SWIMWEAR365	VAT19
HARRY POTTER	LAWSON	NATURAL DISPENSARY	PHARMICA	SCENTS	TE	VEGSOC
HAYES GARDEN WORLD	LAZY OAF	NATURES MENU	PITCH CARE	SCHOLASTIC	TEEFURY	VIDAXL
HAYNES	LDLC	NBA	PIXART PRINTING	SCOUT STORE	TEGIWA	VIDEOHIVE
HEDGES DIRECT	LE CREUSET	NESSY	PLUMO	SCUF GAMING	TEMPUR	VINTED
HEROForge	LIBERTY GAMES	NET LAWMAN	POLAROID	SEA LIFE	TERRACES	VIVE
HEWI	LIGHTING SUPERSTORE	NETWORK	POND KEEPER	SEEDSMAN	TEXAS INSTRUMENTS	VIVINO
HIGH STREET TV	LIGHTS	NEW ERA	POTTERY BARN	SEW ESSENTIAL	THE FURNITURE MARKET	WAI YEE HONG
HIGHSTREET VOUCHERS	LINE6	NEW REG	PRACTICAL FISHKEEPING	SFD	THE GARDEN FURNITURE	WALTONS
HIPPO	LIVERPOOL FC	NIGEL CABOURN	PRACTICAL MACHINIST	SHEDS.CO.UK	THE GIFT	WEB BLINDS
HOBBY LINK JAPAN	LOLA'S CUPCAKES	NIKON	PRECIOUS LITTLE ONE	SHEET MUSIC DIRECT	THE GREENHOUSE PEOPLE	WEDGWOOD
HOBBY RC	LONDON THEATRE DIRECT	NOBODY'S CHILD	PREPLOUNGE	SHOPSTYLE	THE HIP STORE	WEIGHT WATCHERS
HOUSE OF NAMES	LONDON TRANSPORT MUSEUM	NOLO	PRESTO CLASSICAL	THE SHOWER DOCTOR	THE KNOWLEDGE ACADEMY	THE WESTMINSTER COLLECTION
HOW 2 BECOME	LONGON GRAPHIC CENTRE	NORMAN RECORDS	PRICE RUNNER	SHOWERSTOYOU	THE ORGANIC GARDEN	WHIRLPOOL
HOWARTH TIMBER	LOOP MASTERS	NOVEL-TECH	PRINTED.COM	SIDEMAN CLOTHING	THE RAKE	WHITESTORE
HSL	LOVE2SHOP	NURA	PRINTER PIX	SIMPLE ONLINE PHARMACY	THE KNOWLEDGE ACADEMY	WHOLE SALE DOMESTIC
HUGE DOMAINS	LUXURY FLOORING	NYX PROFESSIONAL MAKEUP	PRO AV	SIMPLY GAMES	THE ORGANIC GARDEN	WILSON
HUNKYDORY	M&P	OAK FURNITURE HOUSE	PROTYRE	SIMPLY PLASTICS	THE RAKE	WOOD AND BEYOND
HURN & HURN	MACMILLAN	ODD BOX	PROZIS	SING UP	THE SWISS WATCH CO.	WOODFLOR WAREHOUSE
HUSQVARNA	MACXDVD	ODEALO	PRUSA	SKIDDLE	THE TICKET FACTORY	WORLD DUTY FREE
HUWS GRAY	MANCHESTER CITY	OFFICE STATIONERY	QA	SKILLCRUSH	THE VEGAN SOCIETY	WOW HD
HYPERX	MARGARET HOWELL	OFFICECHAIRUK	QUALITY DIECAST TOYS	SLICKWRAPS	THINX	XIAOMI
I HEART DOGS	MATRESSONLINE	ONE STOP	QUICK CROP	SMASH WORDS	THOMAS KRENN	YANDLES
I-D	MATRIX GAMES	ONLINE CARPETS	QUICK-STEP	SMOL	THULE GROUP	YARNSPIRATIONS
ICE VIRTUAL LIBRARY	MAXI-COSI	ONLINE LABELS	QUIET PC	SOFA WORKSHOP	TISSOT	YOUR DESIGN
INOVB		ONLINEPRINTERS	RADIO WORLD	SOFA SOFA	TOD'S	ZANUSSI
INSTANT PRINT			RALAWISE	SOLEBOX	TONER GIANT	ZENNI OPTICAL
INSULATION EXPRESS				SOLWARE	TOOLS TODAY	ZULILY
INSULATION SUPERSTORE				SOUTHERN SWORDS		

ABOUT UK GROWTH 2000 IN 2022

Figure 1. What do the UK Growth 2000 retailers sell?
The number of retailers that sell a significant number of products in each category



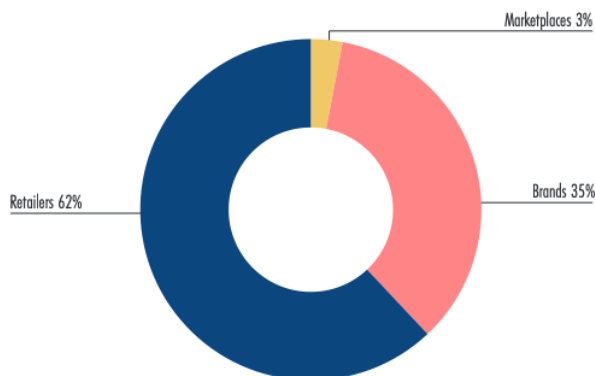
Categories that include at least 100 retailers are shown. Note that some retailers sell in multiple categories

Source: RetailX

CC BY ND

Figure 3. Business types of the UK Growth 2000

The percentage of the UK Growth 2000 retailers that are brands, which mostly sell own-label products; marketplaces hosting third-party sellers; and retailers

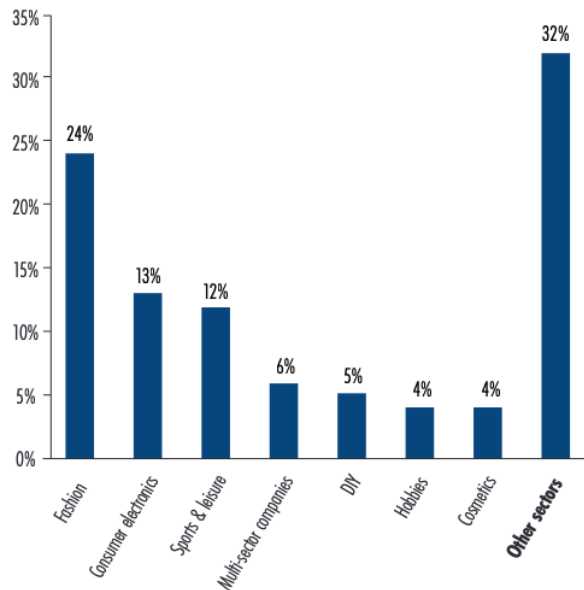


Source: RetailX

CC BY ND

Figure 2. The primary sectors that the UK Growth 2000 retailers belong to

The percentage of the UK Growth 2000 retailers in key sectors



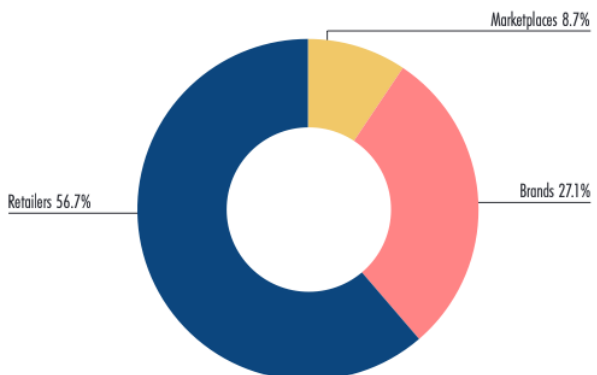
Categories that include at least 100 retailers are shown. Note that some retailers sell in multiple categories

Source: RetailX

CC BY ND RetailX 2021

Figure 4. The split of British web traffic

The percentage of visits from British consumers to the websites of the UK Growth 2000, divided into brands, marketplaces and retailers



Brands are defined as retailers that mostly sell own-label products. Marketplaces are defined as ecommerce websites that host third-party sellers

Source: RetailX

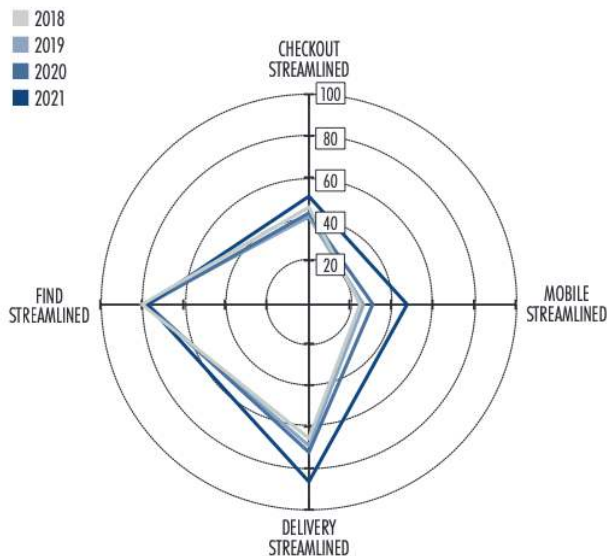
CC BY ND RetailX 2021

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 and sectors 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, 2018-2021

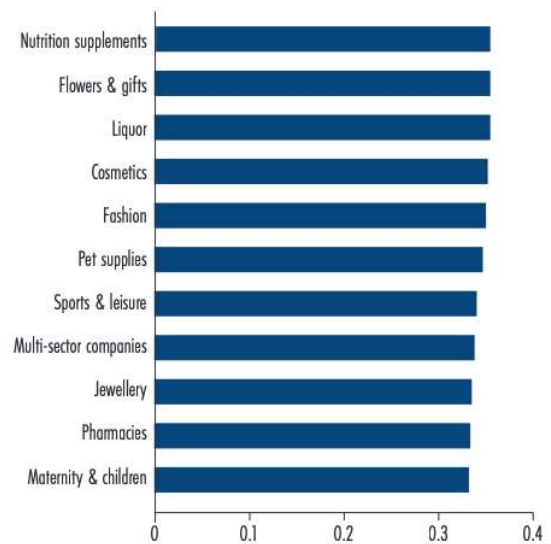


Source: RetailX

CC BY ND

Figure 6. Average performance by sector

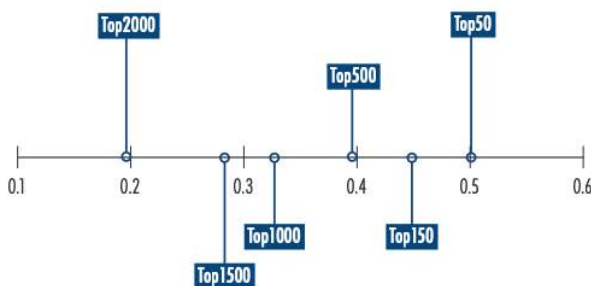
The Average Index Value for the largest sectors



Source: RetailX

CC BY ND

Figure 7. Average performance by cluster



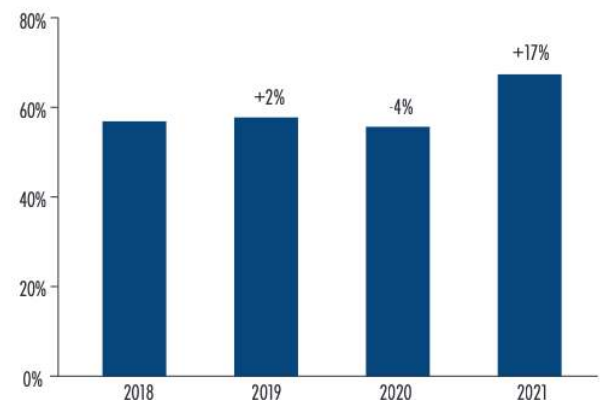
The retailers within each cluster are listed on pages 12-17. A retailer's cluster is determined both by its Footprint size (calculated from revenues, web traffic and stores) which receives a 30% weighting, and by its performance in the other metrics covered by this report (70% weighting)

Source: RetailX

CC BY ND

Figure 8. Overall Index change

The Total Index Value 2018-2021 and YOY change



Source: RetailX

CC BY ND

GET STRAIGHT TO THE PRODUCT

Growth 2000 retailers stand out in the Find Dimension when they make it easy for shoppers to find the right item

Enabling customers to quickly find the right item is the first step to making the sale. Helping shoppers to choose is a useful next step towards the checkout. The tools that enable this are key to the first stage of growth – find.

RetailX assessments of metrics, from ease of navigation and product recommendations to wishlists, are set out here through two key questions: how do Growth 2000 retailers make it easy for shoppers to find a product, and how do they make it easy to choose?

HOW DO GROWTH 2000 RETAILERS MAKE IT EASY FOR SHOPPERS TO FIND A PRODUCT?

Increasing visibility in search results and making it easy for shoppers to navigate the website both help shoppers to find the item they're looking for.

Ease of navigation

Multiple RetailX researchers judged ease of navigation on how easy a single website is to navigate on a scale of one to five. This year, as in 2020, the median remains at three for the 1,155 retailers assessed on this metric both this year and last, while the average is 3.03. Fashion footwear (average of 3.16), accessories, jewellery and fashion clothing (all 3.13) tend to be the easiest to navigate, while automotive goods (2.69) and software (2.72) tend to be the least straightforward, although the differences aren't large. Big improvements came in the software (+0.23) and cycling (+0.177) categories.

Recommend similar products

There's been a slight decline – to 66% from 69% – in the proportion of retailers that recommend similar products to someone who is looking at a product on the website. Those selling hobby supplies (75%), alcoholic drinks, art, cosmetics and personal grooming items, and soft furnishings (all 74%) are more likely to do this than those selling software and automotive goods (both 55%). Musical instrument (+7pp to 73%) and music, film and TV retailers (+7pp to 73%) added this fastest, while pet supplies retailers (-14pp to 69%) appear to have stepped away from offering recommendations.

Search

When shoppers search for a Growth 2000 fashion brand on Google, the brand's own website comes top in results just under a

third of the time, RetailX research suggests. RetailX also measured how often the brand's name appeared at the top of search results for that brand. Fashion brands' own websites came top 30.4% of times, well ahead of homeware (11.5%), sports and leisure (8.7%) and consumer electronics brands (7.9%). Searches for cosmetics brands (6%) came up with their own website the least often.

A related study looked at whether branded products from Growth 2000 retailers and brands are sold on marketplaces. It found that products from more than half (56%) were sold on Amazon, whether directly by the brand or by another seller. A third (33%) were on eBay, 23% on Zalando and 17% on Farfetch. These marketplaces were chosen for being the UK's largest, by traffic volume. The findings reflect the brand's visibility in search results.

Meanwhile, analysis of visits to Growth 2000 brands and retailers, carried out by RetailX of data from Knowledge Partner SimilarWeb found that 27% go to brands and 64% to retailers.

HOW DO GROWTH 2000 RETAILERS MAKE IT EASY FOR SHOPPERS TO CHOOSE?

Finding out what friends think of a potential purchase can help shoppers decide whether an item is the right one for them, while strong visual appeal will make it more attractive. When shoppers can save an item to a list, they are more likely to choose to buy on a future occasion. However, there's evidence of retailers moving further away from features such as sharing products on social, perhaps because more browsers now include sharing options as standard, particularly on mobile.

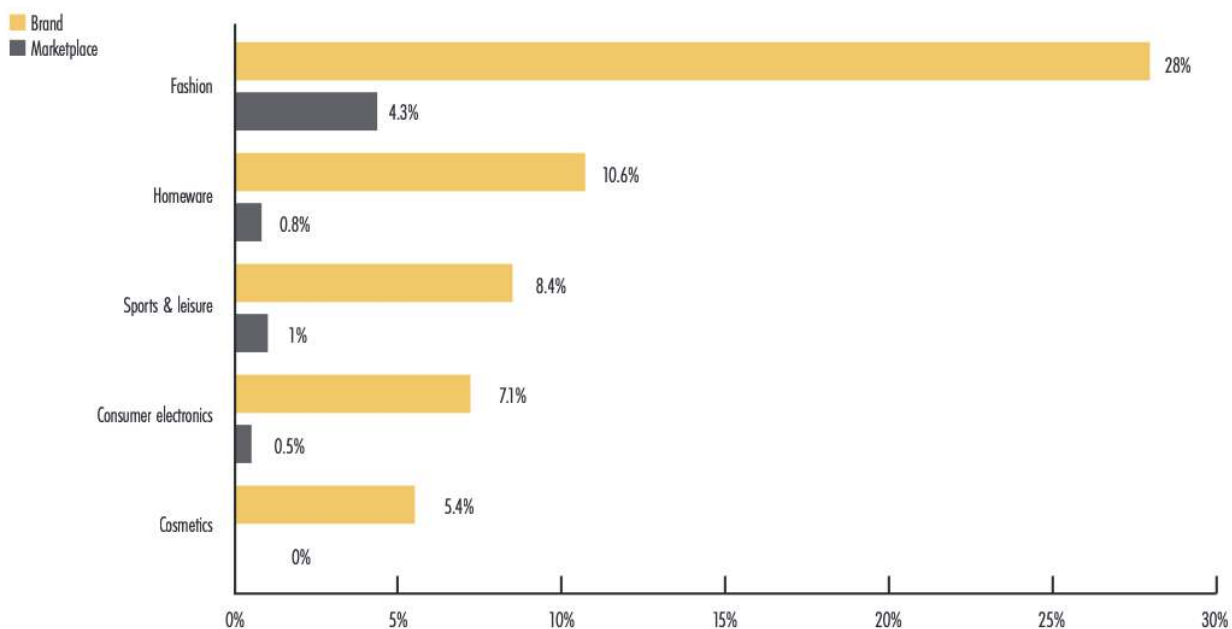
Share with friends

Fewer Growth 2000 retailers now enable customers to share a product with friends, via social media tools on the website. This year's research shows that just under a third (31%) of the 1,733 retailers measured on this metric in both 2021 and 2020 enable website users to share an item with a friend. That's down from 36% a year earlier.

Retailers that remain more likely to share an item include hobby and entertainment vendors (57% do so in 2021), music, film and TV retailers (48%) and booksellers (44%). Grocers (23%) and retailers selling automotive goods and software (26%) are less likely to do so, though those selling automotive products are the most likely to have added the service to their website, following

Figure 9. How Growth 2000 brands perform in search

This chart shows the percentage of the overall top results (whether organic or promoted) returned by Google searches of brands' own names that led to a marketplace website or to the brands' own website



Source: RetailX

© i RetailX 2021

a one percentage point (pp) increase over the year. There were sharp declines in categories including eyewear (-13pp to 27% of 42 retailers measured in both years), sports and leisure footwear (-9pp to 29%), and garden products (-8pp to 29%).

Visual appeal

The median Growth 2000 website scores three out of five for visual appeal, while the average site scores 3.11. RetailX researchers rate websites selling fashion footwear (average of 3.25), soft furnishing, bedding and towels (3.23), clothing (3.21) and brand websites (3.19) relatively highly, while sites selling automotive goods (2.71) and music, film and TV products (2.74) score less highly. The biggest improvement was for those selling eyewear (+0.04 to 3.14) and the biggest decrease was among those selling hobby supplies (-0.25 to 2.86).

Save to list

Four in ten (41%) retailers enable customers to save a product they have found on their website to a wishlist so that they can buy later or share their recommendation with others. That's unchanged on last year.

This feature appears most often on sites selling eyewear (63%), soft furnishings, bedding and towels (60%) and jewellery (59%) and less often on sites selling grocery (33%) and garden products (34%). The biggest uptake of wish lists is on websites selling trade and DIY tools and equipment (+3pp to 42%) and software (+2pp to 44%) but fewer of those selling children's toys and accessories (-5pp to 50%), hobby supplies (-5pp to 46%) and health products (-5pp to 38%) now use them.

LEADING RETAILERS: FIND				
365GAMES.CO.UK	DEMON TWEETS	KATE'S CLOTHING	ROKIT	SOSANDAR
BLUE TOMATO	DUKE OF UKE	MARC DARCY	ROYAL COLLECTION TRUST	SOUS CHEF
BOOKDEPOSITORY.COM	IKRUSH	NATURAL BABY SHOWER	SCOTCH & SODA	SPARTOO
CHURCH'S	IMPERICON	PREZZYBOX	SCOTTS OF STOW	THOMANN
CULT FURNITURE	IN THE STYLE	RIMOWA	SOCIETY6	TWEETS CYCLES

CONVENIENT SERVICES

The Mobile Dimension focuses on smartphones – the most powerful tool available for growing retailers

For customers, smartphones are a convenient tool for browsing and buying online – as well as accessing stores and multichannel services. For retailers, they represent nothing less than a force for growth. In this Dimension, RetailX researchers measured performance through two key questions, by considering the extent to which retailers have mobile apps and also whether they offer collection. Both are useful indicators to reveal relatively sophisticated mobile and multichannel services.

DO GROWTH 2000 RETAILERS HAVE MOBILE APPS?

Mobile apps are a useful but very specific channel for retailers and brands to reach customers. The challenge is to decide whether customers feel enough loyalty to a retailer to give space on their smartphone to their app – and then whether an iOS (for Apple devices) or an Android app would be most appropriate. Once installed, it's likely that shoppers with apps will shop more often with a retailer, using cross-channel services such as store finders and stock checkers where they are available.

iOS apps

iOS apps are slightly more popular than Android apps among retailers, with 13% of 949 retailers assessed on this metric in both 2020 and 2021 having them. That's two percentage points (2pp) up from 11% in 2020. A third (33%) of Growth 2000 traders selling soft furnishings, bedding and towels have one, as do 32% of fashion footwear merchants – following a 5pp increase on the previous year – and 29% of those selling artworks, interior decoration products, and jewellery. Just over a quarter of fashion clothing (27%) retailers have an iOS app. But iOS apps are less popular among those selling trade and DIY tools and equipment (8%) and alcoholic drinks, groceries, branded goods and books (all 13%). In 2021, more brands (+3pp to 12%) along with sports and leisure footwear retailers (+4pp to 21%) have iOS apps, and slightly fewer kitchenware retailers (-1pp to 23%).

Android apps

Some 12% of the 952 retailers measured on this metric in both 2020 and 2021 now have Android mobile apps. That's three percentage points (3pp) more than in 2020. The retailers most likely to have mobile apps sell fashion footwear (28% of traders in this category do so), followed by those selling soft furnishings, bedding and towels (27%), kitchenware (27%), jewellery (24%) and fashion clothing (23%). But few Growth 2000 trade and

DIY tools and equipment (7%) or alcoholic drinks (10%) retailers have them, while brands (11%) and grocers (12%) are also less likely to have an Android mobile app. Fashion footwear (+5pp to 26%) and sports and leisure clothing (+4pp to 19%) launched Android mobile apps fastest during the year, while eyewear retailers (-1pp to 14%) were the only category to move away from them.

DO GROWTH 2000 RETAILERS OFFER COLLECTION?

When shoppers can order online and collect in-store, they can be certain the item they want is in stock, and so find this to be a more convenient service.

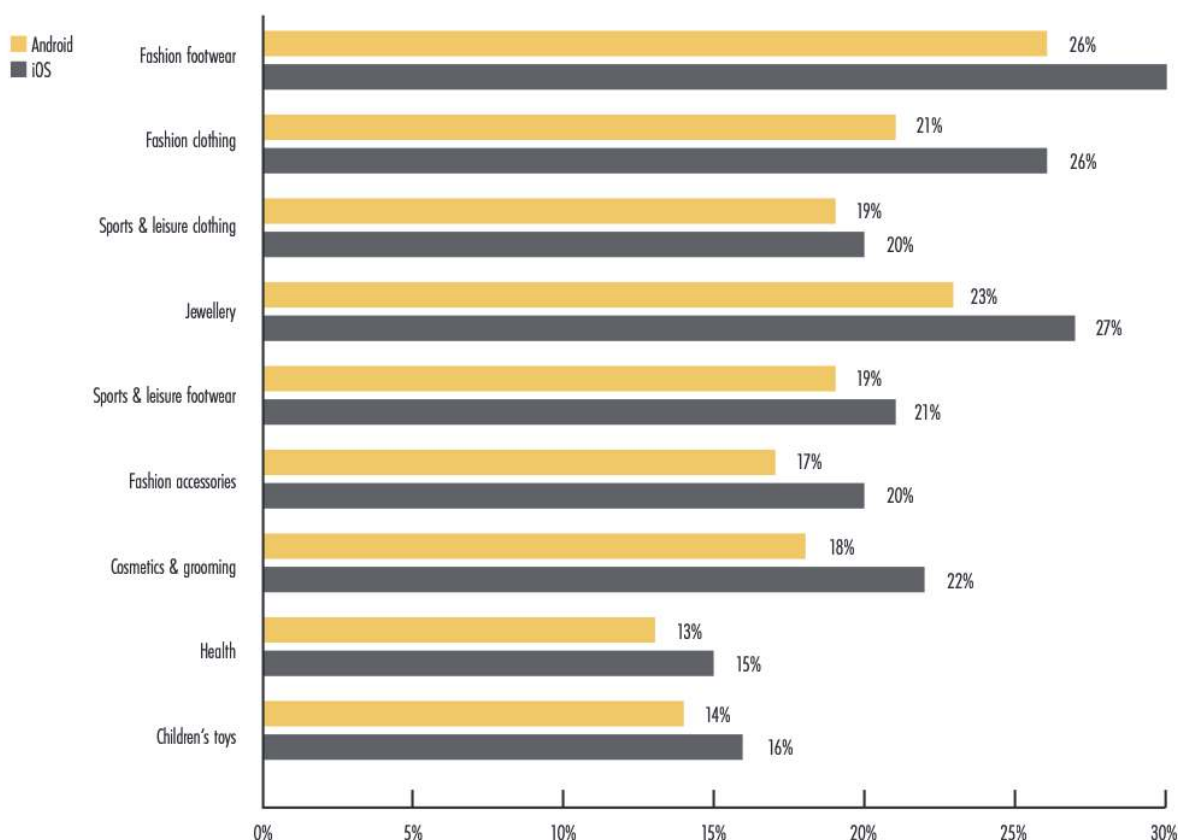
Just under a fifth (18%) of the 1,157 Growth 2000 retailers assessed on this metric in both 2020 and 2021 offer collection. That's 1pp up on the previous year. Those most likely to do so include hobby and entertainment retailers (27%), followed by those selling soft furnishings, bedding and towels and cosmetics and personal grooming (both 26%) – while software retailers (6%) and marketplace hosts (9%) are less likely to do so. The fastest increase – by some distance – was among retailers selling pedal cycles (+7pp to 34%). This may be because bikes have been a popular purchase over the last two years due to pandemic lockdowns, so retailers have adapted to offer more flexible services at a time when many shoppers started to buy more online. There was also an uplift in categories including greetings cards and gifts (+3pp to 16%) and pet supplies (+3pp to 19%). The availability of collection declined in categories including garden products (-3pp to 20%) and marketplace hosts (-2pp to 11%).

How long to collect?

A shopper buying online from the 244 multichannel retailers researched in 2020 and 2021 will wait an average of 60.3 hours – just over 2.5 days – to collect. That's 20 minutes faster than the previous year. The median retailer in this study offers collection in 43 hours (just under two days) – five hours faster than in 2020. Analysed by sector, the fastest median collection times are retailers selling trade and DIY tools and equipment (24hrs) and electronic appliances (24.4hrs). Brands support collection in a median of two days (48hrs). The slowest median collection times are from retailers selling fashion footwear (67.9 hours) and sports and leisure footwear (68.8hrs). The biggest improvement was in the health (-11 to 37hrs) category.

Figure 10. Mobile app use

The percentage of UK Growth 2000 retailers offering Android and iOS apps, by product category



Data accurate in September 2021

Source: RetailX

CC BY NC ND RetailX 2021

How much is collection?

The median retailer that offers collection offers the service for free. Where there is a charge, this is an average of £3.75. Collection is most often free in categories including electronics appliances and trade and DIY tools and equipment. Where it is charged for, electronic appliance retailers charge an average of £1.01, trade and DIY retailers an average of £1.19, and brands an average of £1.46.

Retailers selling fashion footwear and cosmetics and personal grooming items both charge a median of 38p and, respectively, an average of £7.20 and £10.30. Sports and leisure footwear retailers charge a median of 62p and an average of £9.12.

The median cost of collection rose among those selling alcoholic drinks, artworks and interior decoration products and children's toys and accessories (all +£1 to £1).

LEADING RETAILERS: MOBILE				
ALLSOLE	EXANTE DIET	HANON	MOONPIG	SKINNYDIP
AMARA	FASHION NOVA	I SAW IT FIRST	MYBAG	THOMANN
BOTTEGA VENETA	FASHION WORLD	ILGUFO	PINK BOUTIQUE	TICKETMASTER
CHI CHI	FOOTPATROL	IN THE STYLE	RITUALS	WOODHOUSE CLOTHING
CRUISE	GROUPON	IWOOT	SIGMA SPORTS	

FULFILLING PROMISES

Retailers in the Delivery Dimension stand out when they offer fast and free delivery and have generous returns policies

Demand for delivery has grown over more than 18 months of the Covid-19 pandemic, with shoppers increasingly turning online to do their shopping. This has put more pressure on logistics capacity and RetailX research appears to show it slowing down the speed at which shoppers can now expect to get their purchases delivered. Meanwhile, returns periods have become shorter, on average, although the median retailer offers shoppers a little more time to send back an ecommerce purchase they no longer want.

RetailX researchers assessed delivery and returns performance across a range of metrics. Their findings are considered here through two key questions: What delivery promises do Growth 2000 retailers make and what do Growth 2000 returns policies look like?

WHAT DELIVERY PROMISES DO GROWTH 2000 RETAILERS MAKE?

Many shoppers will pay to have their item delivered faster. Next-day delivery, however, has seen a decline since 2020 – and for the second year in a row. This may have started as a pandemic response to the fast-growing demand for ecommerce delivery at a time of supply chain issues including driver shortages and shipping delays. However, all of these issues now appear to be continuing into the long-term.

Standard delivery: how long?

Growth 2000 retailers promise to make a standard delivery in a median of five days – one day longer than last year – and an average of 5.7 days, or 0.2 days longer. Faster median delivery times are found in sectors including greetings cards and gifts (3.7 days) and alcoholic drinks (4.2 days), while the slowest median standard delivery time is among marketplace hosts (6 days). Median delivery times stood still at five days in most categories; among 26 musical instrument retailers assessed on the metric this year and last, delivery times lengthened by a day to five days.

How much?

Standard delivery costs a median of £4 and an average of £5.50. Software retailers tend to charge less, at a median of £2.67, as do those selling automotive goods (£3.70). Those selling artwork and interior decoration (median of £4.80), soft furnishings, bedding and towels (£4.65), grocery (£4.49) and kitchenware (£4.93) tend to charge above the median.

Free delivery

Many retailers offer standard delivery for free when shoppers spend a certain amount. That amount is an average of £64.50 among the 873 Growth 2000 retailers assessed on the metric both this year and last – a rise of £3.30 – and a median of £49, or £3 more than last time. Retailers selling stationery and craft offer free delivery when shoppers spend a median of £31.80, automotive goods (£36.30), and consumer electronics (£38). Those selling fashion clothing (£56), and kitchenware (£55.30) both require shoppers to spend more than the median.

Next-day delivery

This is the area where the biggest year-on-year change to delivery promises is seen. Last year, almost half (46%) of retailers offered the service. That has now fallen by eight percentage points (pp) to 38%. More than half (52%) of retailers selling greetings cards and gifts have the option of next-day delivery, as do 45% of those selling health products and 44% of those selling alcoholic drinks. But only 19% of marketplace hosts do so, as do 26% of software retailers, following a 7pp fall in use, from 34% last year.

Indeed, the proportion of those offering next-day delivery fell in every category, notably in music products (-12pp to 19%), furniture (-12pp to 36%), hobby and entertainment suppliers (-10pp to 36%) and homewares (-10pp to 37%).

Same-day delivery

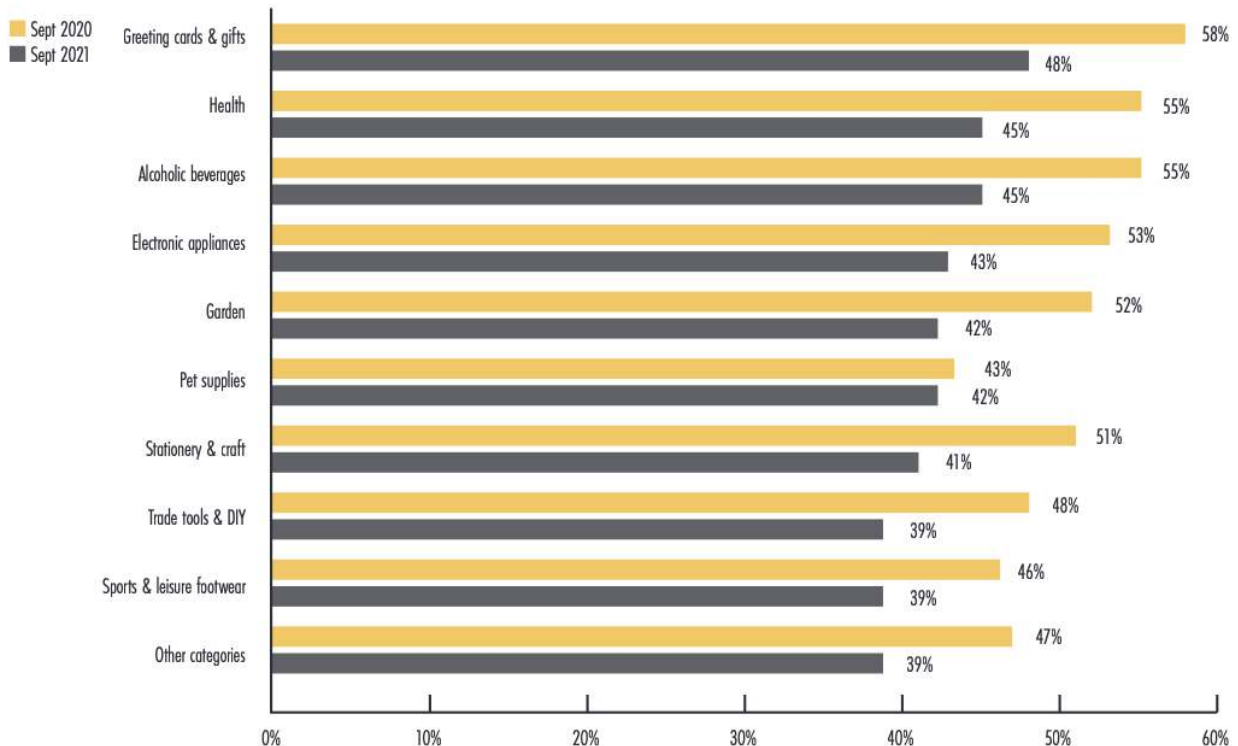
Just 3% of Growth 2000 retailers offer same-day delivery in 2021 – the same proportion as in 2020 – among the 1,154 retailers assessed on this metric both this year and last. The service was most quickly adopted among retailers selling musical instruments (+4pp to 6%) and is more often found on websites selling gifts and greeting cards (4%) than on those selling furniture, hobby and entertainment supplies, music, film and TV products and soft furnishings, and bedding (all 1%).

WHAT PROMISES DO GROWTH 2000 RETAILERS MAKE ON RETURNS?

Retailers give shoppers an average of 52.5 days to return the purchases they make online but no longer want. That's 11.6 days less than last year. Among the 1,097 retailers assessed on this metric both this year and last, the median period of 25 days is one day longer than last year. Longer median returns periods

Figure 11. Next-day delivery availability by product category

Significantly fewer retailers offer next-day delivery in 2021



Premium, fast delivery options became common over the past decade but since the pandemic, that trend has reversed, with a shift towards slower fulfilment times. RetailX suspects this change is largely due to short-term, supply-side challenges rather than a long-term shift

Source: RetailX

© RetailX 2021

are offered by retailers selling sports and outdoor equipment (28 days), sports and leisure footwear (28.3) and clothing (28.8) as well as fashion accessories (28). Those selling sports and leisure footwear and clothing now have both returns periods that are a median of one day longer than last year.

At the other end of the scale, the median grocer offers the legal minimum of 14 days to return an item, although the average returns policy allows 20.9 days, and the median marketplace host offers a median returns period of 16.9 days, and an average of 28.1. Those selling art work and interior decorations reduced their returns periods to a median of 25 days.

Pre-paid returns

More than a third (34%) of Growth 2000 retailers offer pre-paid returns – up from 31% a year earlier. Fashion footwear (55%) and clothing (49%) are among the most likely to prepay returns as are those selling jewellery (51%), sports and leisure footwear and eyewear (both 47%). Less likely are those selling hobby and entertainment supplies (16%), despite a 5pp rise in the percentage doing so, and groceries (19%). Sectors that adopted the service fastest included garden products (+7pp to 23%), alcoholic drinks (+7pp to 31%), and books (+7pp to 29%). No sectors reduced their use.

LEADING RETAILERS: DELIVERY				
ANTLER	BUYAPARCEL	DEMON TWEETS	HYGIENE SUPPLIES DIRECT	MR MEMORY
ASTLEY CLARKE	CARTRIDGESAVE.CO.UK	FETCH	JADLAM	RS COMPONENTS
ASTRID&MIYU	CHRISTOPHER WARD	FREEMANS.COM	MENNACE	SAUCONY
BERGHAUS	COACH	GETGEARED	MERCHOID	SECRET LINEN
BONDARA	CRUISE	HUMAX	MILITARY 1ST	VALENTINO

CLINCH THE SALE

Retailers that make it easier to buy stand out in the Checkout Dimension

Making the final step of the journey – the checkout – a simple one helps retailers and brands to grow. Often shoppers abandon a purchase simply because they cannot remember their registration details, or cannot see their preferred payment method when they come to pay. Conversely, a simpler payment process can help website visitors to buy.

Shoppers are further helped in making buying decisions when they know what other customers thought of the product they are considering, as shared through product ratings.

In the Checkout Dimension, RetailX researchers assess metrics including whether registration is required to buy on a Growth 2000 website, the alternative payment methods available at the checkout, and whether retailers enable shoppers to see what others thought, through star ratings.

Their findings are grouped here through two questions: How easy do retailers make it for shoppers to pay, and to what extent do retailers enable shoppers to find out what others thought?

HOW EASY DO RETAILERS MAKE IT FOR SHOPPERS TO PAY?

Requiring registration and using third-party checkouts both involve a trade-off between acquiring the data from a new customer that enables marketing to build relationships in the future, and offering a more straightforward experience using a third-party checkout, letting shoppers use sign-in details they already know and remember. Many retailers achieve a balance between the two by giving shoppers the option to checkout via one or more third-party checkouts, while also giving them the opportunity to create an account after purchase in order to receive discounts, newsletters and offers.

Require registration before checkout

More Growth 2000 retailers now require visitors to register before they can buy. In 2021, more than half of the 1,155 retailers (56%) assessed on this metric both this year and last do so. That's seven percentage points (7pp) higher than a year earlier, when 49% did so. Brands (62%), along with those selling cosmetics and personal grooming products, alcoholic drinks, sports and leisure outdoor wear and clothing (all 59%) are the most likely to require a visitor registers to check out. Less than half of marketplace hosts (40%), software retailers (47%), as well as those selling garden, music, film and TV products (all 48%) do so.

Registration to buy has grown across all categories, with the fastest adoption in categories including cycling (+17pp to 56%) and soft furnishings, bedding and towels (+16pp to 53%).

Alternative checkouts

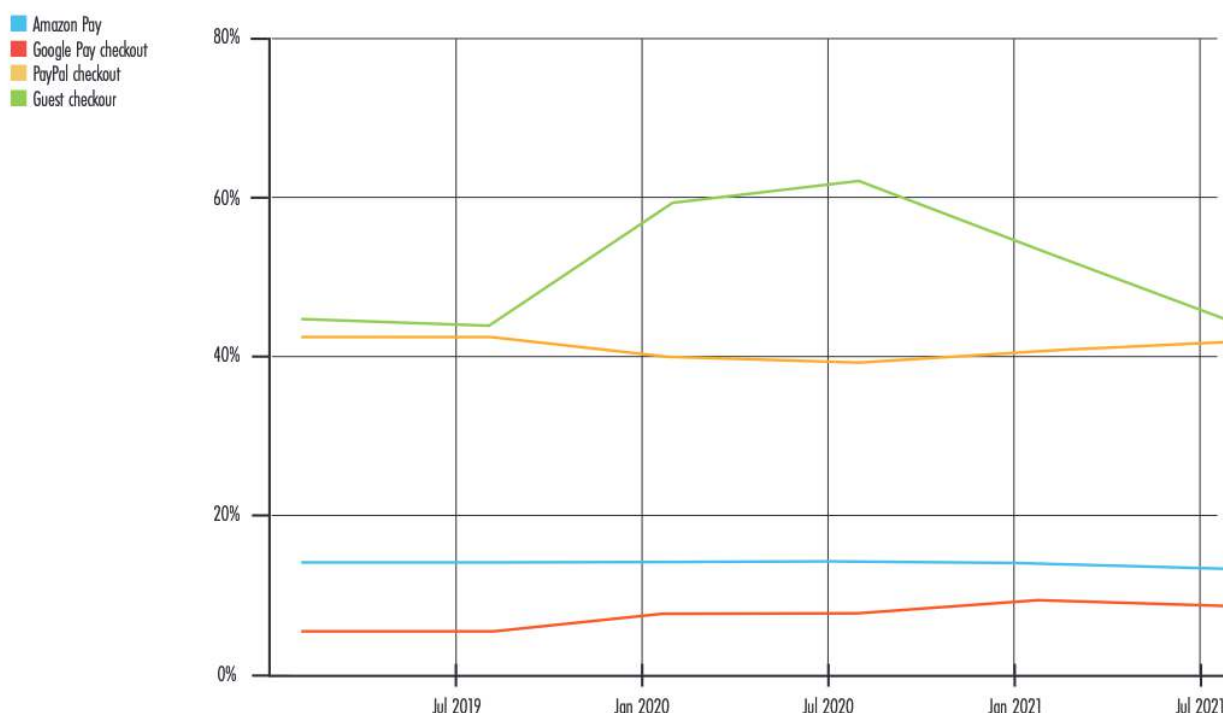
PayPal has increased its share of the Growth 2000, with 41% of 1,146 retailers assessed both this year and last now using this alternative checkout. That's up by 2pp from 39% last year. Almost half of retailers selling garden products (46%) – following an 11pp growth in this category – and music, film and TV products (44%) support PayPal, while uptake is lowest by some way among grocers (13%). PayPal saw strong uptake among retailers selling pet supplies (+12pp to 54%), and trade and DIY tools and equipment (+6pp to 44%). The most marked fall was among those selling hobby and entertainment supplies (-4pp to 39%).

Amazon Pay is used by 11% (-1pp) of the 1,145 retailers measured on this metric both this year and last. A higher proportion of those selling jewellery (15%), fashion clothing (14%), and fashion accessories, trade and DIY tools and equipment and homewares (all 13%) use Amazon Pay, while a lower proportion of those selling hobby and entertainment supplies and garden products (both 3%) do so. The fastest uptake was among those selling music (+3pp to 3%), while fewer cycle retailers now use it (-4pp to 4%).

Some 8% of retailers use Facebook login, allowing customers to login and share their names and email addresses, following a 1pp decline since last year. Use was higher among marketplace hosts (29%) and those selling eyewear (20%), furniture (15%), cosmetics and personal grooming product as well as automotive goods (both 15%). It was lower among brands, and retailers selling trade and DIY tools and equipment, garden products and software (all 6%). The fastest uptake was among those selling cycling products (+8pp to 16%), while those selling garden products (-4pp to 4%) moved away from Facebook login fastest.

The same proportion use Google Pay (-1pp to 8%) as use Facebook login. Those more likely to use Google Pay include marketplace hosts (19%), and those selling automotive goods (17%) and eyewear (16%). Software (5%), trade and DIY tools and equipment (5%) were least likely to use Google Pay, followed by grocers and those selling electronic appliances and consumer electronics (all 6%). Cycle retailers (+5pp to 14%), and those selling automotive goods (+4pp to 14%) and furniture (+4pp to 11%) are more likely to deploy Google Pay than last

Figure 12. The percentage of Growth Top 1000 retailers offering third-party and guest checkout



Note: The Growth Top1000 subset of the Growth 2000 is shown here, with the same retailers measured in each period ensuring a like-for-like comparison

Source: RetailX

CC BY ND RetailX 2021

year, while those selling sports and leisure clothing (-3pp to 9%) and footwear (-3pp to 10%) are slightly less likely to do so.

PRODUCT RATINGS

Knowing how previous customers rated a product can be crucial in making the decision to buy. In 2021, half (50%) of the 1,733 Growth 2000 retailers assessed on this metric both this year and last shared star ratings on their products. That's down by 5pp from 55% a year earlier.

Product ratings are shared by more than half of those selling health products (64%), electronic appliances (61%), trade and DIY tools and equipment and garden products (both 59%). At the other end of the scale, just over a third of those selling eyewear (35%) and fashion footwear (39%), and marketplace hosts (39%) deploy them. A few categories added star ratings – most notably those selling pet supplies (+4pp to 71%) – but more stopped sharing them, including retailers selling musical instruments (-11pp to 42%) and groceries (-9pp to 52%).

LEADING RETAILERS: CHECKOUT				
ALLSOLE	ETYRES	GROUPON	IZABEL LONDON	REVOLUTION BEAUTY
B&H PHOTO VIDEO	FLOORING DIRECT	HOME LEISURE DIRECT	MOTEL	SIMPLY HIKE
BLICK	GOLFOFONLINE	HQHAIR	MY VITAMINS	TEAPIGS
COOL COMPONENTS	GRAFF CITY	HYGIENE SUPPLIES DIRECT	ORLEBAR BROWN	THE SAFETY SUPPLY COMPANY
ERIC DRESS	GRASS DIRECT	IMPERICON	REDOUTE, LA	TWO SEASONS

FIND

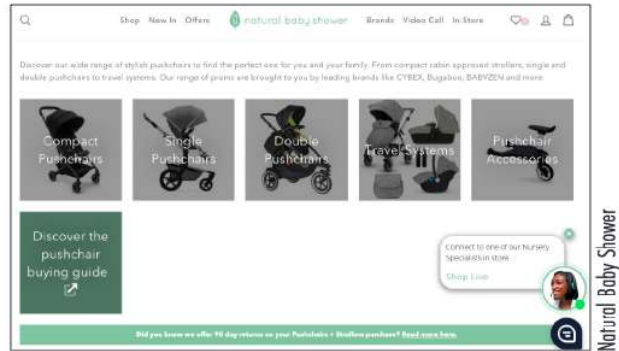
Natural Baby Shower: guiding shoppers to the right product

naturalbabyshower.co.uk

Natural Baby Shower gives online shoppers lots of help in finding just the right thing. Which should prove useful for visitors who may well come to the site to buy a gift for someone else, and with little personal experience of the products.

The site walks shoppers through the process of finding the baby product they want to buy. Twelve categories are clearly illustrated on the home page, ranging from car seats, pushchairs and strollers, to changing bags, meal times, autumn and winter, and wear and change. Once shoppers click the category they are most interested in, they can quickly narrow their search further to see the brands in that section before exploring each range in more detail. Additional help with finding the right product is offered in the form of buying guides, a blog, live chat and virtual buying appointments. Visitors to the website can also search by brand or move quickly to the 'offers' or 'new in' section.

Natural Baby Shower was founded in 2007 by parents on a mission to supply shoppers with natural and sustainable baby products. It now sells online as well as through a flagship store in Bagshot, Surrey. Its UK delivery service includes standard five-day



Natural Baby Shower

delivery free on orders over £45, along with a range of premium express and nominated-day options. Expected delivery dates are shown in the shopping cart, although international deliveries were suspended at the time of research. The returns policy is relatively generous – customers can make a return by post, to the store or to a third-party locker within 60 days for a full refund, or, after that, within 90 days for a credit or e-voucher. The original delivery charge is also refunded and refunds are processed within two days. Twelve checkout options include Klarna, Layby, Apple Pay, PayPal and Amazon Pay. The website is mobile-friendly but the retailer does not flag up a mobile app on its website.

MOBILE

Ticketmaster: delivering through mobile

ticketmaster.co.uk

Ticketing business Ticketmaster stands out for its service to mobile users, enabling them to browse and buy through a website that is optimised for mobile, or through its Android or iOS apps.

Since shoppers can buy digital tickets, they can complete their transaction on a mobile device, rendering collection unnecessary. Indeed, the pandemic has pushed ticketing further towards digital, with many tickets now routinely scanned from a mobile phone. This August, Ticketmaster scanned more than half a million people into festivals and outdoor events, including the Reading and Leeds festivals, which were fully digital for the first time.

Mobile tickets are available via the Ticketmaster app, which means that customers no longer need to find their email to get the PDF or to print them out. Tickets appear in the app as soon as they are bought, while those who have bought mobile tickets for others can easily transfer them to the people who are using them.

Ticketmaster was founded in the US in 1976 and now works with venues and event organisers around the world as well as in the UK.



Ticketmaster

It boasts being the first business to sell tickets online and now it sees more than a billion digital visitors a year.

In addition to sales, Ticketmaster's mobile app fast search function also helps customers to find venues they want to attend or the artist they want to see. Once they've found the right event, shoppers can choose their seats via the app and get directions to the venue – multichannel services that give shoppers a convenient experience. Alerts can be set for favourite events, while app users can add events to their calendar or share events with friends.

DELIVERY

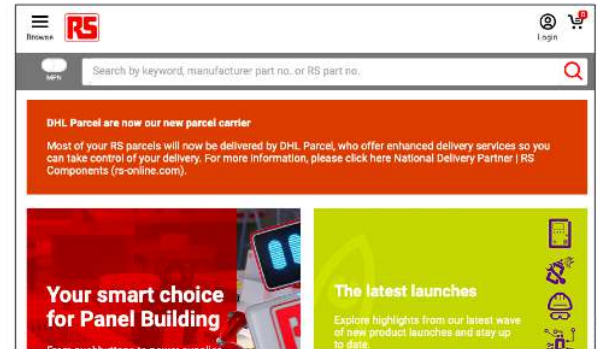
RS Components:
comprehensive delivery service

uk.rs-online.com

As a supplier of industrial and electronic products, RS Components operates in the trade tools category that is now highly competitive for delivery. It has risen to the challenge with an effective and flexible delivery promise. The retailer, which uses DHL Parcel as its main delivery provider, offers fast, timed and consolidated delivery options to customers, who can order via the website, telephone, email or fax.

Next-day delivery is standard and free to business account customers, while those ordering via private and guest checkout accounts only pay a £4.95 delivery charge when their order is under £30. Urgent orders can be sent via same-day courier, while other fast options include timed delivery and same-day collection from its 16 branches, Monday to Friday. Those who choose to collect can see on the website whether the item is immediately available for same-day collection or whether it will need to be sent via next-day delivery.

For those with more time to spare, options include ordering online for a future date, order consolidation and 'call off' – where RS Components holds the stock a customer expects to use at its local branch, only delivering – and charging – when it is needed. Tracked delivery is standard and customers can track their order via the RS Components home page. Returns of unwanted products can be made within 30 days of receipt, requesting a return via the



customer's account before using the returns label from the delivery information or downloading one from the website.

Beyond the comprehensive delivery offer, RS Components also makes it easy for shoppers to find the right item, offering search by keyword, manufacturer or parts number, or navigation through illustrated categories. Users can create and order a parts list, as well as ask for advice via live chat.

RS Components' roots go back to 1937 but it has been providing parts for industrial customers and suppliers under its current name since 1971. Today, it sells from a range of more than half a million industrial and electronic products from more than 2,500 suppliers and ships over 50,000 parcels daily from operations in 32 countries.

CHECKOUT

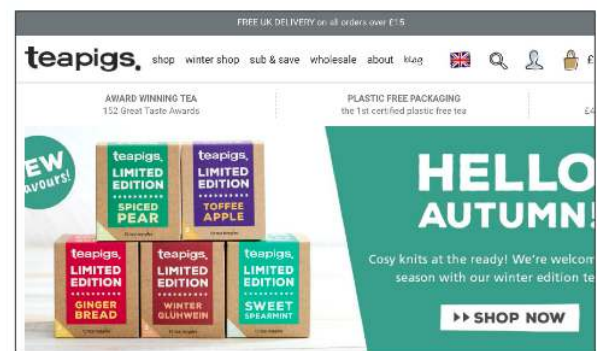
Teapigs: fast and easy checkout

teapigs.co.uk

Teapigs stands out in Growth 2000 research for its easy-to-use checkout, with the retailer offering a wide choice of payment options alongside their wide range of teas. When shoppers first arrive at the checkout, they can opt to pay instantly, without registering for an account, using one of three express checkouts: Shop Pay, Apple Pay or PayPal. If none of those suit, they can still opt for a further seven options, including Google Pay and a range of credit cards. Throughout the checkout process, the retailer flags up how many stages are involved as customers move from the cart to giving their information, shipping and then payment details before being offered a review of their order. The website also offers shoppers the option of subscribing to their preferred tea in order to save.

The Brenford retailer was founded in 2006 and is now a certified B-Corp, being the first tea retailer to be certified plastic free and its tea bags made from corn starch and paper.

Beyond checkout, the retailer also has straightforward navigation and search, making it easy to find the right product. Its navigation



includes a match-o-meter that recommends the right tea for the customer's mood, whether that's sleepy, hungover, stressed, wired or more. Its delivery promise includes standard three- to five-day delivery for free when customers spend £15 or more, or for £4 under that, and next-day delivery for £6 on orders placed by 11 am. The website performs well on mobile, although the retailer does not flag up an app on its home page.

CASE STUDIES

FIND

Rituals: explore the range

rituals.com

Dutch lifestyle brand Rituals helps shoppers from around the world explore its range of fragranced homewares and beauty products. The retailer sells online to 29 countries through a website equipped with both language and currency selectors. Countries include Europe and the UK, Hong Kong and the United States.

A leader in the Find Dimension, Rituals assists shoppers who are looking for items through search, while on the home page, a 'do you have a question?' link takes shoppers to an FAQ section. A simple navigation structure quickly takes shoppers to the type of homewares, beauty, body or gift product that they want to find. Four filters then enable a further narrowing of the search by collection, product, range or price range.

Meanwhile, shoppers who are browsing can follow well-illustrated content in order to find out what the website sells and how its products can be used.

Customers can easily find their nearest physical store on the home page. These range from Rituals' own stores in the Netherlands to, in the UK, shops within a range of third-party department stores, health and beauty shops, airports and hotels. From the home



page, shoppers can also sign up to the Rituals newsletter, read its magazine and join the My Rituals loyalty club.

Beyond Find, the retailer offers a wide variety of payment options at checkout, including PayPal and Klarna, alongside credit cards and its own gift card.

It also has both Android and iOS apps, which allow shoppers to access meditations, yoga videos, personalise gifts and pay using Apple Pay. Fulfilment options include click and collect and standard delivery – at a cost of £9.90 for delivery in up to four days – while goods can be returned for up to 90 days using a printable, pre-paid return label.

MOBILE

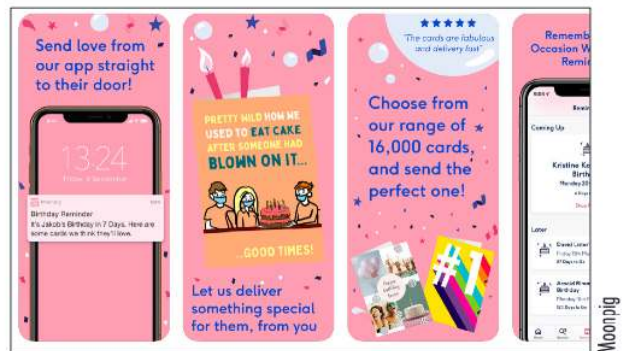
Moonpig: mobile-first selling

moonpig.com

Moonpig has a mobile-first website that shoppers can navigate easily to find item they are looking for from their smartphone or other mobile device. Shoppers can both choose from a wide array of cards and design or personalise their own card, easily navigating the site through categories that reflect common shopping missions, such as 'birthday card', 'Christmas cards' or 'free card with flowers'. There is also an effective search option.

The London and Guernsey-based business was founded in June 2000 and today sells personalised cards, flowers and gifts. It has recently set up a partnership with Virgin Wines to offer a range of wine-based gifts.

Moonpig offers both iOS and Android apps and uses them to offer a range of personal services that make the most of the functionality of smartphones. Users can set birthday reminders on the app, add images or handwritten messages from their phones and use an augmented reality tool to see what size any card looks like in real life. Other mobile-specific functionality includes



importing birthdays from the phone calendar and payment via Apple Pay, PayPal and credit cards. In-app live chat connects to customer services for any queries.

The retailer stands out on delivery, with same-day posting for orders that are completed by 9pm and the ability to show each order's delivery date. There are also delivery options for customers who plan ahead, who can choose to have their order delivered on a future date or sent to international markets.

DELIVERY

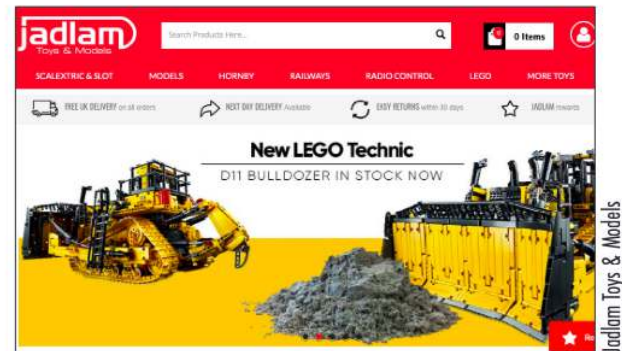
Jadlam Toys & Models: a strong delivery promise

jadlamracingmodels.com

Speed matters for Jadlam Toys & Models, which makes its delivery promise very clear on its website. From the home page, it flags up its offer of free UK 48-hour delivery on all orders, with next-day delivery also available. On the product page, availability is made clear along with details of how quickly an individual product can be shipped. The retailer sells a range of models, kits and toys from brands including Hornby, Scalextric and Lego, and offers a range of choices on delivery. Customers can get their kit in two to three days for free, pay £2.49 for delivery in one to two working days, or £3.99 for express one-day delivery when orders are placed by 2pm. All the services are trackable.

International delivery to Europe is currently suspended in the wake of Brexit, although parcels can be sent to non-European international destinations. Returns can be made within 14 days if an item has been opened for inspection, or within 30 days if unopened. Returns are not pre-paid but the retailer covers the cost of the return if an incorrect – or damaged – item was sent.

Jadlam started life in 2005, from a room above a bicycle shop in Glastonbury, Somerset, and has since expanded to its own



premises in Wells. It now sells through its own website as well as through a range of third-party marketplaces and websites.

Beyond delivery, the retailer has an easy to navigate website, through brands and product type. Search filters include product availability, brands, scale, price and age suitability. Customer reviews and ratings show what other people thought.

Jadlam Toys & Models offers a broad choice of payment methods including PayPal, Apple Pay and Klarna. The retailer operates three social media channels – Facebook, Twitter and Instagram – but does not flag up a mobile app from its home page.

CHECKOUT

Grass Direct: choice at the checkout

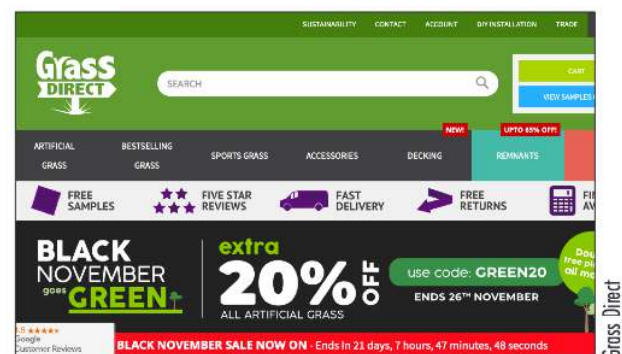
grassdirect.co.uk

Artificial grass specialist Grass Direct, which is a leader in the Checkout Dimension, offers online shoppers a range of ways to pay, while also giving them choice about registration.

At checkout, customers can opt to log into their Amazon Pay account to share their shipping and payment details quickly. Alternatively, they can go through checkout as a guest, with the option to register with an account afterwards.

Payment choices are similarly flexible, with options including PayPal alongside credit cards. Finance is available on purchases over £500. There's a further checkout option in the samples basket, where visitors can add up to six samples to this dedicated basket before checking out for free during a process that also asks for consent to add to the mailing list for further offers.

The Checkout Dimension includes metrics on product ratings, an area where Grass Direct stands out. The retailer itself awards stars to products to show both their softness and their wear, along with how customers rate and review its products, via Yotpo. This includes how shoppers rated their grasses on four metrics: quality, value for



money, appearance/realism, and comfort. The home page shares star ratings via Google Customer Reviews and Trustpilot.

The Cardiff-based multichannel retailer was founded in 2012 and delivers through its own fleet of vans along selected routes. Its products include artificial grass for sports surfaces, such as putting greens and football pitches, and well as a range for gardens and other spaces.

Its fulfilment promise includes one-hour delivery timeslots on a nominated day, with standard delivery charged at £24.95, while products can be returned up to 100 days later.

CASE STUDIES

FIND

Tweeks Cycles: helping consumers navigate a complex product range

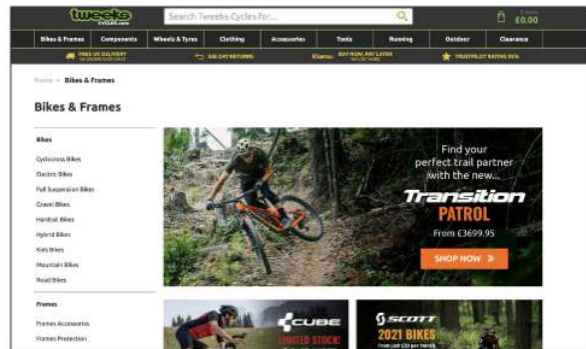
tweekscycles.com

Those who like the outdoor life can be very particular about the brands and products they favour. Moreover, the specialist kit a hill runner requires is quite different to what a mountain biker needs. And while some customers will be new to their hobby, others expect to be offered higher-end brands and, in the case of experienced cyclists, accessories and spares to fit at home.

While it's aimed primarily at cyclists, Tweeks Cycles' website helps all these different types of customer find what they need through search. On the website's homepage, the search facility is immediately visible at the top of the page – centred rather than off to one side. Type in 'clothing' and you are offered a list of categories as well as specific items.

Similarly, searching in different subcategories is also straightforward. Click on 'Bikes & Frames' and you are offered different subcategories – 'Cyclocross Bikes', 'Electric Bikes', 'Full Suspension Bikes' and so on.

More generally, Tweeks' website conveys the owners' enthusiasm for cycling. "We live and breathe everything cycling and we want



Tweeks Cycles

everyone, young or old, male or female, roadie or mountain biker to get as excited about hitting the roads and trails as we do," notes the 'About' section of the site. The company's Wrexham base, it continues, is close to the Clwydian and Snowdon mountain ranges, meaning "adventure is only a few wheel spins away".

These words are backed up by such resources as a trail guide to help those who want to explore off-road routes in different regions. All of this is done without ignoring business basics such as giving customers reassuringly clear information on such subjects as deliveries and returns. This attention to detail helps to place Tweeks Cycles in the Top50 of the RetailX Growth 2000.

MOBILE

Amara: how to convey style and substance

amara.com

Even a decade ago, it was widely thought that consumers would never really want to buy big-ticket items online. The assumption was that consumers would always want to see and touch items such as sofas, tables and beds. However, the development of the market over the past ten years has shown otherwise.

We are moving towards a mobile-first market, with mobile shoppers currently making up 66.7% of all internet shoppers in the UK. It follows that retailers without a cohesive mobile presence to serve customers shopping via the mobile web and/or apps will lose out in the years ahead, no matter what sectors of the market these retailers occupy.

While luxury homewares retailer Amara has yet to launch an app, its mobile website is both stylish and easy to use, with a landing page of bold images illustrating the retailer's range and, more subtly, a sense that the site is aspirational without being in any way snooty. Click on the images and you are taken quickly to clearly presented products.

Anticipating that consumers may have worries about buying big-ticket items online because of such factors as delivery cost,



Amara

each product page is clearly laid out and tells you all need to know. Product imagery is clear and stylish, which is important both in terms of conveying brand values and because consumers have little patience when items aren't clearly shown on the small screen of a smartphone.

Amara's emphasis on design is in keeping with its story. Founders Sam and Andrew Hood started the company as a luxury boutique in 2005 before focusing online from 2008 onwards. The company works with such brands as Versace Home, Missoni and Roberto Cavalli. Its most recent website launch was in Saudi Arabia in 2020 – a reflection of Amara's international reach.

DELIVERY

Berghaus: conveying core brand values through logistical excellence

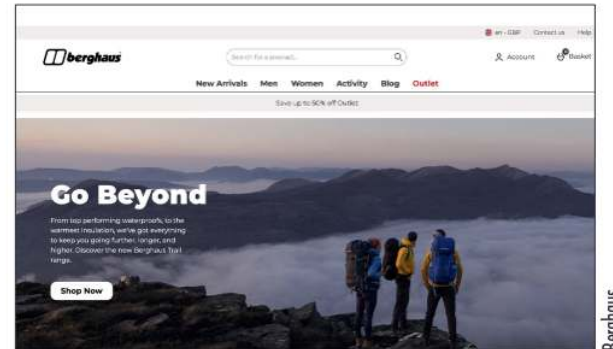
berghaus.com

There is a particular and specific onus on any retail brand to offer exemplary customer service. Should something go wrong, it could potentially damage the company's reputation not just in terms of its ability to get retail basics right, but because all its branded products risk being associated with the same problem.

It follows that outdoor wear company Berghaus has to be true to its delivery promises or risk consumers not only turning their backs on its site after a bad experience but perhaps also staying away from its bricks-and-mortar outlets too. Berghaus' homepage is therefore designed to quickly reassure its customers. Beneath links to product categories, there's a strip that answers all delivery questions.

This section of the homepage makes it clear that a standard delivery is free. Click through and you get a price for express delivery – £5.99. This is a no-frills approach, with clear and easy-to-understand displayed without customers having to click anywhere else.

There is also information relating to returns, with the company's 60-day free return policy prominently displayed. Click through and there are instructions on how to go about returning an item.



Even information about the company's free repair service is on the home page, with the concepts of repairing rather than replacing and keeping "your kit going over land, not into it" chiming with Berghaus customers' interest in the environment. In line with this, the site also offers additional information on caring for existing products so they last longer.

As well as selling online, Berghaus has bricks-and-mortar stores in major British cities such as London, Manchester and Bristol. While it's probably fair to say it is a mid-market brand, Berghaus has a rich heritage and a reputation built over many years of bringing innovative products to the outdoor clothing and equipment market.

CHECKOUT

Flooring Direct: stepping in to help customers

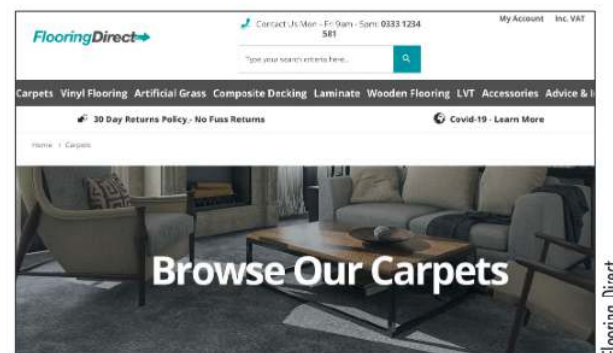
flooringdirect.co.uk

In an age of livestream commerce, in-app purchases and clicking through directly to purchase pages via Google, the idea of the sales funnel is now less of a preoccupation for many retailers. This doesn't mean the website sales funnel has become unimportant, just that in a mature ecommerce market, it is assumed that retailers will be able to guide their customers towards purchases.

In truth, that's probably an assumption that needs to be questioned. In March 2020, 88% of online shopping orders were abandoned^[1]. Even allowing for people shopping around and never seriously intending to make a purchase, this is still a very high figure. Which make the performance of a company such as Flooring Direct in this Dimension particularly impressive.

As its name suggests, Flooring Direct supplies carpets, flooring, decking and artificial grass. These are comparatively difficult products to buy online since the consumer has to work out how much space needs to be filled or covered. It's no surprise to find that Flooring Direct has invested in Visualizer technology to help out.

While there's less novelty and pizzazz about the company's checkout, it's still clear and very easy to use. Click on checkout and



you're taken to a page where there's a live chat support box – a reassuring feature for inexperienced customers tackling DIY projects. On the same page, AmazonPay and PayPal are offered as payment options. It's also clear from this page that consumers have 30 days to return items, with "No Fuss".

This chimes with the company's branding, which, via its 'About us' page, promises high quality and low prices, to simplify the process from planning to purchasing and, echoing the checkout page, "fuss-free service".

[1] [statista.com/statistics/457078/category-cart-abandonment-rate-worldwide/](https://www.statista.com/statistics/457078/category-cart-abandonment-rate-worldwide/)

METHODOLOGY

OUR RESEARCH COVERED FIVE AREAS:

FOOTPRINT: calculated on retail turnover, the ecommerce subset of this turnover, web traffic and the number of stores.

FIND: the extent to which retailers demonstrate visibility, simplicity and expertise in search and navigation.

MOBILE: whether retailers demonstrate an understanding of mobile UX and multichannel, and if they have mobile apps.

DELIVERY: measuring speed and cost of delivery, the flexibility of fulfilment and returns, and click and collect services.

CHECKOUT: the website features and third-party plugins retailers use to help shoppers make a final decision to purchase.

PERFORMANCE CLUSTERS

The UK Growth 2000 is ranked in statistically similar groups. Top retailers have performed to an exceptional level across all areas and are statistically separate from subsequent clusters. The Top Growth 2000 retailers of 2021 are listed as the Top50. The retailers, combining both size ('Footprint') and capability, represent the leading edge of UK retailers outside the Top500.

Top150 retailers include the next 100 retailers and represent the best-practice level for retailers of their size in ecommerce and multichannel retailing, exemplifying RetailCraft at its best.

Between the Top150 and Top2000, retailers are grouped in a way that expresses their measured performance in a way that goes beyond their variation in size, reach and turnover.

WHAT CONSTITUTES A RETAILER?

The Growth 2000 are the largest retailers according to their Footprint outside the UK Top500. The modern multichannel landscape is more complex than merely 'having a website' or 'operating a store'. In choosing the RetailX Growth 2000 (G2K) we have considered companies' intent, capabilities and activities around the recruitment and monetisation of customers. The definition of a 'retailer' for inclusion in our research is:

DESTINATION: in the minds of customers, a destination is a shop, site, place, time or event that's a source of product, service or experience.

FASCIA-FOCUSED: individual trading names, rather than a parent company that may operate more than one brand. Since group structures are invisible to customers, they have no bearing on the position of brands owned by a group.

PURPOSE: the retailer has created goods and/ or services for the specific purpose of selling to the purchasing consumer.

MERCHANDISING: the retailer actively sells and is not just a portal for taking customers' money.

ACQUISITION: the retailer actively markets, recruits and attracts customers with a promise or proposition to the destination.

SALE: the retailer takes the customer's money. The retailer owns the transaction as the merchant of record.

RECOURSE: the retailer is responsible for the service, fulfilment and customer satisfaction owing from the sale.

EXCEPTIONS: we may include a certain business due to its influence upon retailers and retailers' customers.

EXCEPTIONS

MARKETPLACES: only when a marketplace undertakes customer acquisition and manages both payment and recourse on purchases is the company eligible for inclusion.

PURE TRANSACTION/TARIFFS: we will not necessarily include businesses where ecommerce is not the main function. For example, online payment for gas or electricity.

B2B AND DIRECT-SELLING BRANDS: Due to the increasingly retail-like behaviour of B2B brands, we have included certain direct-selling brands and B2B businesses.

TECHNICAL DESCRIPTIONS

RETAILERS SELLING THROUGH MARKETPLACES: the top ten results for a pattern as returned by Google are selected to determine whether a retailer's name appears in a marketplace's URL as would a seller on that marketplace.

MARKETPLACE VISIBILITY INDEX: the top five domains returned by Google for retailers which are marketplace hosts are selected.

TOP RESULT FOR BRANDS: Whether or not at least one of the retailer's domains (or a retailer's marketplace host) appears in the top result of a Google search is evaluated.

WEBPAGE METRICS: the loading time, design, best practices and SEO are measured using Google's open-source and automated tool: Lighthouse.

IN CONCLUSION

Over the course of this year's research, we've seen how Growth 2000 retailers are demonstrating their resilience as they adapt to the way shoppers now want to buy, despite the challenges around Covid-19 and Brexit. At the same time, these retailers and brands have come up against ever greater competition and higher expectations from the shoppers they serve, who are now making more of their purchases online.

We are already seeing members of the Growth 2000 adapt once again to even larger challenges – becoming sustainable and rethinking what they are selling, how they are selling it and how they will deliver it.

During the course of this research, it has been clear that many traders in the index are using recycled and more sustainable materials, or offsetting their carbon footprints through measures such as tree planting and shifting towards renewable energy.

RetailX is currently developing new metrics to measure how Growth 2000 retailers are changing to meet the climate challenge, as well as to understand the scale of this change. We plan on sharing our findings in the Growth 2000 2022.

In the meantime, we always want to hear from you, both with suggestions of new metrics that our research should now track, and with the names of retailers that we have not tracked this year.

Chloe Rigby, Editor

Thank you

Thanks to our Knowledge Partners for their contributions to our year-round research, as well as for helping us to bring our insights and findings to professionals working in ecommerce and multichannel retail.



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