

The Year in Data 2022

Multichannel retail in numbers

In partnership with



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Introduction



Welcome to the first-ever RetailX Year in Data Report

Over the past few years and even through the pandemic, the number of reports that RetailX produces has continued to grow. **Our researchers and editors now look in depth at the ecommerce and multichannel retail sector from a variety of different perspectives** – ranging from making performance-based assessments of leading companies through to analysing what's happening in different sectors. These are both hugely valuable approaches for those looking to learn from the best of the best.

We also look at different countries and regions. Increasingly too, we are finding there is a demand for research into aspects of retail practice where businesses need to negotiate a rapidly changing business environment. This is why, for example, sustainability has become such a focus for us. **I expect us to be busier than ever next year.**

In order to offer an overview of this work, I am pleased to launch our new Year in Data Report. First and foremost, **this is a way to gather together the datagraphics we produced over the course of 2022.** Each datagraphic offers an at-a-glance summary of some of the most important insights we gleaned while compiling these reports. Please do draw on these datagraphics when you prepare your own reports and presentations.

In addition, **the Year in Data Report offers editors and researchers the opportunity to pause and to take stock.** That seems particularly important after a year such as 2022, when it seemed as if business conditions changed daily, a huge challenge for an industry that first came of age at the turn of the millennium, a time when the geopolitical and economic landscape was far easier to negotiate.

So have we highlighted the *right* numbers? To which subjects have we not paid sufficient attention? Will our predictions about retail in 2023 prove accurate? Please do send me your thoughts.

Ian Jindal
CEO, RetailX

Contents

About RetailX's reports	03
Datagraphic thumbnails	04
From the editors	06
Partner perspective: Akeneo	16
Partner perspective: Avalara	18
Partner perspective: Impact.com	20
Partner perspective: Tealium	22
Datagraphics	23
Looking ahead to 2023	48
Conclusion	51

About these reports

RetailX is born of an obsession with performance in multichannel retail and ecommerce.

Mark Pigou brought the first ever high-level B2B conference on ecommerce to the UK in 2004. The launch event was admired and critiqued in equal measure by Ian Jindal and a relentless “we-can-do-better” partnership was born. They teamed up with SJP Business Media to launch the first dedicated B2B website and print magazine for Europe’s multichannel and ecommerce retailers: *InternetRetailing*. In 2006, they launched IRX, the UK’s largest dedicated trade show. Along with their events business, IRX was then acquired by Clarion Events in 2015.

RetailX is the continuation of the journey. The multichannel retail sector is highly sophisticated, rapidly expanding and continuously evolving. It is collegiate yet highly competitive, ruthlessly optimising yet perennially in beta, commercially driven yet experimental and generous.

RetailX’s mission is to provide the data, analysis and insights to enable retail professionals to build successful and profitable businesses. Currently, RetailX produces reports in three main areas:

RETAIL PERFORMANCE

Since 2014, RetailX has researched more than 11,000 retailers and direct-to-consumer brands, assessing and ranking their performance on more than 300 metrics. We produce the only objective, performance-based ranking of Europe’s retailers. Our influential annual reports include the UK Top500, The EU Top1000, The Top500 Brands in Europe, the UK Growth2000 and the EU Growth3000.

Access to the reports is free of charge to Top500 retailers via InternetRetailing (free membership required), by individual purchase or annual corporate membership.

COUNTRY REPORTS

Our Country and Regional Reports provide a clear overview of the state of commerce in each country, blending data from ecommerce and trade associations with national and European government data, our own research and other sources. Our reports provide an authoritative, comprehensive and accessible view of the ecommerce trends, facts and figures in each territory.

Reports are free to RetailX members and to members of each country’s ecommerce association, or can be purchased directly.

SECTOR REPORTS

RetailX reports provide the strategic and commercial context in which the best retailers and brands perform in their market sectors. Combining over four years of in-depth company performance research with analysis of sector dynamics, retailers will gain a better understanding of the current state of our sector, and a lens through which to glimpse the coming two-to-five years.

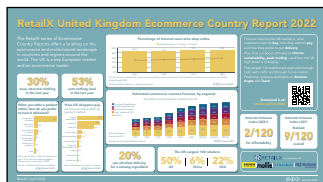
CUSTOM RESEARCH

In addition to our published reports, our six-year research archive, billions of datapoint and individual metrics can be mined and analysed for your specific requirements.

- Custom reports: We can analyse by region, sub-region, sector, metric, time-periods and create custom comparisons or analyse in greater depth than print or general interest allow. If you have particular requirements for data access and analysis, discuss your needs with us.
- Custom research: Should you require additional or deeper research into any area within multichannel retail or direct-to-consumer digital commerce, please let us know your requirements and we’ll be happy to advise and quote.
- Board presentations: If you would like to discuss with us our findings, arrange a board presentation or would value face-to-face analysis from our team, Martin Shaw and Ian Jindal are available. Please contact us with enquiries: research@retailx.net

Datagraphics

In each case, click on the thumbnail here to be redirected to the full report



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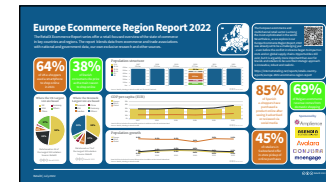
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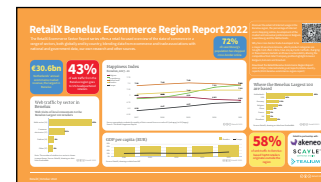
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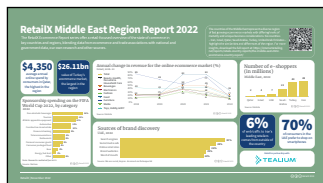
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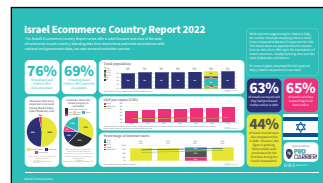
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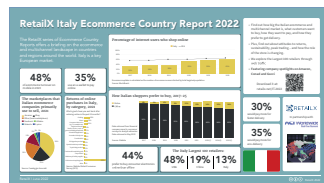
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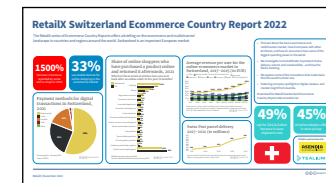
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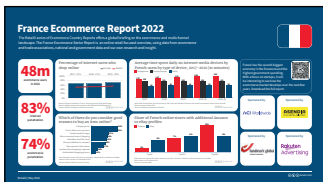
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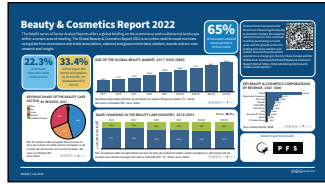
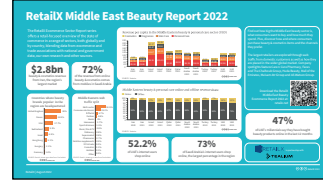
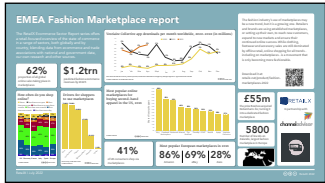
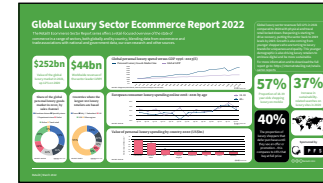
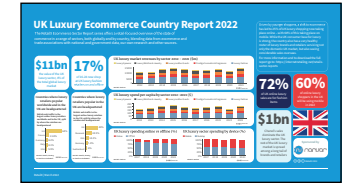
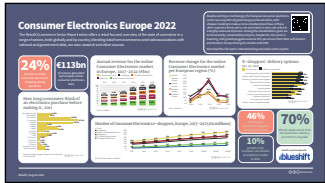
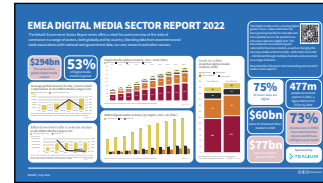
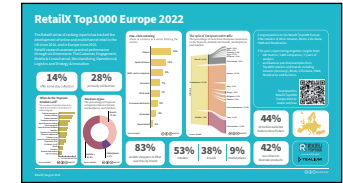
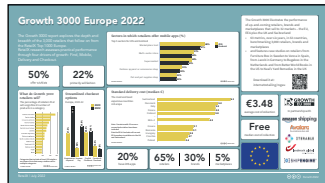
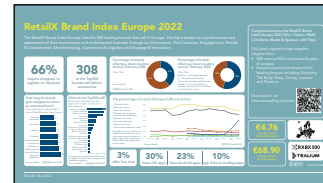
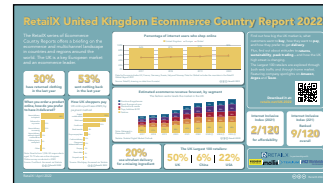
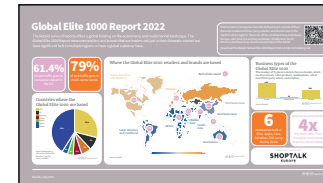
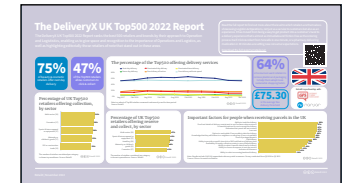
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From the editors

Our experts offer their perspectives on 2022

Change is constant in the multichannel retail sector but that's okay... **we all like change**. Yet in truth, and this is just between ourselves, we have become so pre-programmed to say we embrace new technologies, new channels and new merchandising methods that we don't always acknowledge just how stressful retail can be.

This is truer than ever for supply chain issues in the wake of the pandemic, inflation and the way the geopolitical situation is impacting on the economy. One small but significant way to lessen the stress is to **understand how the industry is changing and what may lie ahead**.

The researchers and editors at RetailX spend the year considering these questions. It's their insights and their collective ability to spot a telling statistic that underpins all we do. Over the following pages, **the RetailX editorial team offer their thoughts on key areas:** company performance, global ecommerce and multichannel retail, logistics, marketplaces, the relative performance of different sectors and sustainability.

Company performance

Chloe Rigby outlines how different retailers have coped with an uncertain year in the global economy

Companies large and small have been moving from one uncertainty to another during the course of the year. Many started 2022 with too much money tied up in stock after going to great lengths – some had chartered their own container ships – to ensure they had enough to sell for Christmas 2021 in the wake of pandemic-related supply chain issues. The need to stock up was far from the only assumption that quickly unwound – **the belief that shoppers would continue to buy much more online after Covid-19 than they did before has also been corrected**.

UK shoppers who bought more than 39% of their retail purchases online during lockdowns in February 2021 gradually returned to stores once vaccination programmes were rolled out and trading restrictions lifted. **By May, around 26% of retail sales were online**, a proportion that has stayed steady through the remainder of the year.

In February Russia's invasion of Ukraine first drove a wide range of brands and retailers – from Ikea, Asos and H&M to Burberry and LVMH – to suspend their Russian sales^[1] before eventually closing down their operations in the country. It also pushed up the price of energy as the UK and other European countries moved away from Russian gas and, to a lesser extent, oil. This has led to inflation and **a weakening in consumer confidence that means**

this winter shoppers are mostly concerned with rising energy bills, with many not now planning to do any Christmas shopping at all.

All of this uncertainty has been reflected in weakening consumer confidence and, ultimately, in the balance sheet.

More UK stockmarket-listed retailers issued profit warnings for the third quarter of 2022 than had done so since 2008, an EY-Parthenon Profit Warnings report for the quarter suggested. The number was 69% up on a year earlier, and up by 34% on the previous quarter^[2].

A range of retailers navigating the continued uncertainty went into administration during the year – from Studio Retail in February to online-only fast fashion business Missguided in May and multichannel fashion retailer Joules and digital natives made.com and Eve Sleep – all in November. **All have been bought by larger and longer-established companies with store chains**. Frasers Group bought both Studio Retail and Missguided, as well as Savile Row tailor Gieves & Hawkes. Next bought made.com and Joules, while Eve Sleep was bought by Bensons for Beds.

Given what has happened to assumptions this year, it would surely be unwise to have too many about the coming year.

^[1] <https://internetretailing.net/international/updated-ecommerce-and-multichannel-retailers-and-brands-suspend-sales-in-russia-as-the-effects-of-ukraine-invasion-widen-24485/>

^[2] <https://internetretailing.net/industry/retailers-report-highest-number-of-third-quarter-profit-warnings-this-year-as-weak-consumer-confidence-adds-to-worries-on-costs-and-supply-chain/>

The RetailX UK Top500 is dominated by multichannel retailers

All of the Elite retailers in this year's Top500 are now multichannel retailers since Amazon has opened shops, including both Amazon Fresh grocery shops and Amazon 4-Star general merchandise shops. This is a shift that a number of other digital natives have made, although we also cover in the Top500 report how multichannel retailers are right-sizing their store estates. M&S, for example, has set out ambitions to have 180 full-line stores – suggesting 100 large store closures were to come at the time of publication – while Shoe Zone is looking to have about 250, down from 410 at the end of its full-year to October 2021.

Localisation in the RetailX Europe Top1000

Top1000 websites are most likely to be localised to the UK, followed by Germany. They are least likely to be localised to Denmark and Portugal.

32% of Top1000 retailers enable shoppers to select the currency they want to pay in, while 43% offer the choice of country.

Digital natives win out

All of the companies in the largest ten ranking within the Global Elite are relatively new businesses, having been established in the digital age. The only exception is French supermarket group Carrefour, which has invested heavily in digital as well as innovating with multiple formats and channels across a number of different regions.



Global ecommerce and multichannel

Crossing continents. Jonathan Wright considers the overarching lessons of RetailX's regional and country reports

It wasn't supposed to be this way. As 2021 gave way to 2022, a prevailing narrative was that ecommerce and multichannel retail were getting back to something approaching normal, albeit at a higher level due to so many people shopping online for the first time during

the pandemic. **Supply chain issues, it was anticipated, would gradually sort themselves out over the year** as containers found their way to where they were needed.

In truth, clues that 2022 would be a rather different year in business terms were already there to be seen. As early as December 2021, 100,000 Russian troops were massing to invade Ukraine. More recently, in the light of protests in China over its zero-Covid policy and lockdowns, many of us had somehow failed to notice that **one of the world's manufacturing powerhouses was nowhere near as open for business as we had thought.**

Underpinning these developments, it is possible that many in the ecommerce and multichannel retail sectors were too optimistic about the prospects for growth. It turns out that, with the pandemic coming to an end, **many people were only too happy to return to bricks-and-mortar stores** rather than continue to shop online.

But if 2022 was not the year we anticipated, how should we characterise it? One theme emerging again and again from our research was the idea that **multichannel retail is now a mature industry.** Even in regions where there is the greatest scope for growth, notably in Africa with its rising

megacities, we suspect you can broadly see already how the sector will develop.

Which is not to say that every region is somehow the same. Far from it. **The inherent tension in ecommerce is between the way certain patterns of behaviour spread and the need for retailers to localise.** Even thrifty Germans, for instance, now use credit cards more often because, frankly, it's easier than the cash on delivery they've always relied on.

While this tension remains, what has changed is that retailers can no longer, if indeed they ever could, assume that a generally rising market and cheap money will help them resolve this tension, or that increased revenues will hide strategic errors.

Here perhaps lies the real lesson of 2022. In an uncertain year when inflation has bitten and consumers have become much more careful about their spending, **it's more important than ever for retailers to understand the markets in which they operate** and, more importantly, their customers and potential customers.

A final point here. In an era when **privacy concerns are on the rise and customers are worried about the environmental impact of consumerism**, anyone expecting so-called 'normal' business conditions to return – which often seems to mean the relatively benign conditions that prevailed immediately before the global financial crash – is likely to be disappointed.

Cross-border traffic in Benelux

Belgium and Luxembourg have high levels of cross-border shopping online. Foreign nationals, mainly from other countries within the EU, make up 70% of the Luxembourg capital's population, the largest proportion coming from Portugal. This results in a nation of cross-border shoppers. 52% have bought from an online store in another country within the EU. Cross-border retailing accounts for 31% of Belgium's ecommerce market.

Overall, the Benelux region covers 1.7% of the landmass of the European Union, has 5.6% of the population and generates 7.9% of the continent's GDP.



Changing consumer behaviour in Spain

35% of consumers in Spain shop for groceries online. Before the pandemic, this had been a retail category seeing slow uptake, even in mature markets such as the UK. Since Spain's consumers have jumped straight in, Spanish grocers are now rapidly expanding their back-end systems to keep up with demand.

Africa has the potential to be an ecommerce powerhouse

While the percentage of those online who use ecommerce sits at around 50% across the globe, Africa is an outlier, with 27% of those online also shopping online. Yet as Africa grows and its mega cities increasingly exert an influence on the global economy, the adoption of ecommerce on the continent will grow rapidly.

Social matters in Iran

September's clamp down on Instagram resulted in a missing marketing channel and lost sales for online retailers in Iran. This was as much as between \$1,500 and \$20,000 a day in lost revenue for each online retailer, according to Tehran NSR – substantial figures in the local currency. For some of the retailers, these figures equate to a 50%-70% decline in orders. Parcel deliveries in the country dropped by 25%.

Logistics

DeliveryX editor Katie Searles on why keeping promises by delivering on time remains key to retail success

Shoppers may have been able to return to the high street in 2022 but their love – and therefore demand – for home delivery remains, creating another interesting year for retailers and logistics firms alike.

Next-day, same-day, within an hour, within 15-minutes, to the home, collect in store, pick up at a parcel locker, and all for free – **shoppers now have so many delivery options to choose from**. The retailers that succeeded this year were the ones who delivered.

Offering convenient, and increasingly sustainable, delivery options remains of high importance for retailers, as it is often the retailer who suffers for bad service. A study this year found that 70% of UK consumers are less likely to shop with retailers after hearing about a negative delivery experience^[1].

One way of avoiding unhappy customers is to keep them informed regarding their parcel's journey. DeliveryX's UK Top500 2022 report highlights that **89% of consumers want the ability to track the delivery, yet only 65% care about receiving it the next day**.

Rapid slow down

2022 might be the year that proves speed isn't everything when it comes to ecommerce delivery.

The emergence of rapid delivery (quick commerce or even q-commerce) during the various lockdowns seemed like the next big thing in urban logistics. However, news of recent acquisitions, mergers and exits from unsuccessful markets have led to some asking if the rapid delivery sector can pedal on.

Green delivery

Whether consumers will still want packages in 15 minutes in 2023 remains to be seen, **what is clear is that shoppers want deliveries to be green**. A huge 85% of European consumers are even willing to boycott companies and brands who contribute to global warming^[2].

It is little wonder that retailers including M&S, Ikea, Zara and Selfridges have all championed sustainability and circular economy initiatives this year. Even supermarket **Tesco has pledged to have a fully electric home delivery fleet by 2028 before becoming net zero in the UK by 2035**^[3].

Carriers are also doing their bit, with DHL switching to electric vehicles, Evri trialling e-cargo bikes and Yodel planting trees.

Industry in crisis

Investing in sustainable solutions has certainly been at the heart of many retailers and logistics firms' plans in 2022 but will these green goals take a hit during the recession?

It may become hard for retailers and delivery firms to focus on sustainability targets when they are trying to keep the lights on. **2022 ends with inflation at a record 11.1%**, and strike action for a "dignified" wage rocking delivery giant Royal Mail (as well as train operators and the NHS).

Royal Mail has said that it may have to make 6,000 workers redundant if the industrial action continues^[4]. But 2022 ends with more strike dates announced and last delivery dates brought forward. Retailers who rely on Royal Mail, and consumers awaiting parcels, will be hoping for a resolution so that disruption doesn't spill over into 2023.

[1] www.metapack.com/blog/70-of-uk-consumers-less-likely-to-shop-with-retailers-after-hearing-about-a-negative-delivery-experience/

[2] <https://deliveryx.net/reports/the-deliveryx-uk-top500-2022/>

[3] <https://deliveryx.net/company-spotlight-tesco/>

[4] <https://deliveryx.net/royal-mail-warns-of-up-to-6000-job-cuts-following-strikes-and-falling-parcel-numbers/>

Small is beautiful

Early data from a trial in Bristol with Zedify – which is testing pedal-powered electric vehicles such as cargo bikes – shows a 13% increase in efficiency plus a 98% reduction in carbon emissions when parcels are delivered by bike rather than by a traditional van.

Marketplaces

Paul Skeldon reports on a sector that is now integral to the global retail economy

Europe's marketplace sector is going through a boom time. Doubling in revenue between 2020 and 2022, it now rakes in some €200bn across the whole continent, with rapid, albeit slowing, growth expected to continue throughout this current decade.

Over the next five years, **third-party online marketplaces are set to be the largest and fastest growing retail channel**, accounting for nearly two-thirds of total online sales by 2027. In China, that figure already stands at 80%.

As a result, the global marketplace economy hit \$2.9tn in 2021 and is **predicted to be worth in excess of \$5tn five years from now**.

Much of this growth is likely to come from just four sites: Amazon, Alibaba, Pinduoduo and JD.com.

US retailer Walmart, which also runs a third-party marketplace, is going to be another major player and between them, these five companies are likely to generate around \$4.3tn of the total sales from marketplaces by 2027. That will be 59% of all ecommerce.

The reason? Convenience. **Convenience of price, convenience of delivery and, perhaps above all, convenience of choice.** With many shoppers new to ecommerce buying their laptop or smartphone online out of necessity during lockdown, marketplaces – particularly eBay and Amazon in the West and Alibaba, Tmall and JD in the East – were a simple way to get started. With almost anything they could wish to purchase all in one place, their early experience of ecommerce was a simple one. Excellent and competitive delivery options added to this and so the number of consumers looking to use marketplaces worldwide surged.

And these vast numbers of consumers have stuck – to such an extent that **the marketplace model for selling is starting to be reinvented by retailers themselves.** Increasingly, retailers are expanding their own online offering by adding a marketplace area of their site that sells complementary goods – sometimes even from competitors, as UK fashion retailer Next demonstrated. This approach allows them to reach consumers in a way that they like, extending the retailer's reach with minimal effort while often adding whole new revenue streams.

The consumer shift towards using marketplaces has seen the model adopted as a means of servicing niche markets. Specialist marketplaces that bring together goods from various suppliers that are gathered thematically are nothing new – Asos, for example, has cornered the market

in fast fashion using a marketplace model focused solely on the fashion and apparel segment. **What is new is that marketplaces are starting to spring up that cater to, say, second-hand and pre-loved fashion** – Depop, Vinted et al – or sites focused solely on end-of line fashion, such as Secret Sales. This focus by segment brings marketplaces back to where they started: Amazon, after all, started life as an online bookstore.

How have RetailX's Top 500 brands and retailers responded? **They have largely embraced selling on marketplaces across the continent, alongside running their own D2C offerings.** 477 of them have listings on the Top 15 marketplaces in Europe, with 398 of them having some form of detailed listing or storefront of their own within these marketplaces. For retailers and brands alike, marketplaces have become very much a key part of their sales strategy.

Price matters on marketplaces

Searching for a bargain is a key driving factor for those shoppers turning to marketplaces for fashion purchases. Nearly 73% of shoppers said price was the reason for using marketplaces. The ease of use and choice all on one platform follows quickly behind, with convenience cited by 72% of consumers.

RETAILX

Fashion Brands and Marketplaces 2022

Ecommerce Sector Report

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The resell economy is real

Consumers are becoming increasingly environmentally conscious in their shopping habits, with many switching to more circular shopping and second-hand fashion. The most-popular online marketplaces for second-hand fashion are Etsy (69%), Facebook Marketplace (53%) and Poshmark (51%)

Marketplaces are on the rise

In the next five years, third-party online marketplaces are set to be the largest and fastest-growing retail channel globally, accounting for nearly two-thirds of total online sales by 2027. In China, the figure already stands at 80%. The European marketplace market currently takes around half of all ecommerce sales across the region, a figure approaching \$200bn in 2022, up from an estimated \$150bn in 2021 and double 2020's level.

The relative performance of different sectors

What can businesses learn from their peers operating in different parts of the market? Paul Skeldon offers his thoughts

Retail is an industry made up of many sectors, often interconnected, but each telling a different story about the travails of the industry across the past two years. Here, we break down how some key sectors have performed, based on RetailX's research reports from 2022.

GLOBAL LUXURY

Luxury has come out of the pandemic raring to go. The reopening of international travel saw sales driving a noticeable uptick in the sector's fortunes. The US leads the

market in terms of consumer luxury spend, with a market value of \$55bn, while China is fast catching up at \$44bn.

GLOBAL FASHION

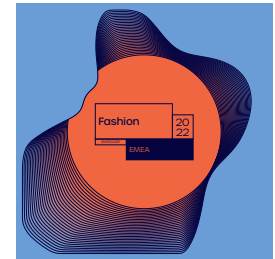
Fashion retail has become an icon of how to rapidly switch from traditional, physical retail to online-only to tech-led hybrid selling as **its youthful market continually changes how it shops**. Once seen as a sector that would never be able to adapt to ecommerce, it now sees 46% of sales coming from online, growing to 60% by 2024. **Global fashion retail is worth \$752bn**, with the US and China each accounting for some \$300bn of this. Europe makes up the bulk of the remainder. **The market is increasingly driven by consumers looking for more ethical choices**, with second-hand fashion and environmentally-friendly garment manufacture high on the list of shoppers mores moving forwards.

RETAILX

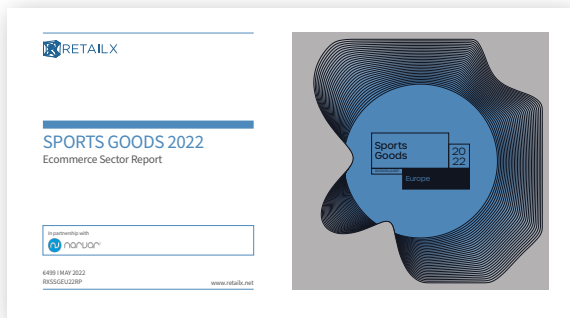
Fashion 2022
Ecommerce Sector Report

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Globally, the sector is being driven by increasingly young shoppers looking for uniqueness, especially in luxury fashion, with **many turning their backs on environmentally unfriendly fast fashion** in favour of more sustainable one-off luxury pieces to last a lifetime.



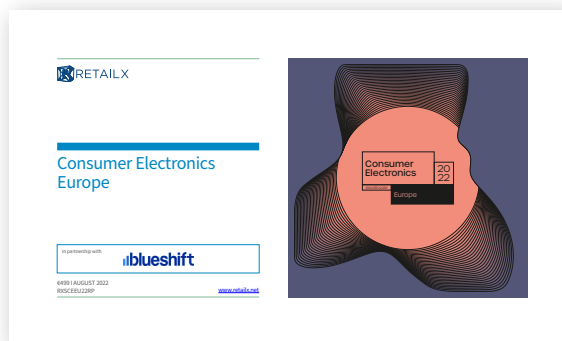
GLOBAL SPORTS GOODS

Historically, the sports goods market has been one that has seen steady but modest growth – although that looked to have gone into reverse when the pandemic struck. However, a move towards solitary and home exercise, coupled with home working seeing fashion shift towards wearing sportswear for Zoom meetings, **2020-21 saw the sector hit new highs**, with the EMEA market worth €12bn in 2021, markedly up from €10bn the year before. **It is forecast to hit €13bn in 2022.** A focus on health and wellbeing post-pandemic has also driven sports goods – and health apps from sportswear brands – to account for 36% of Europe’s online shopping searches.

GLOBAL BEAUTY AND COSMETICS

Asia remains the largest market for the beauty sector overall but around the world, online is taking a larger share

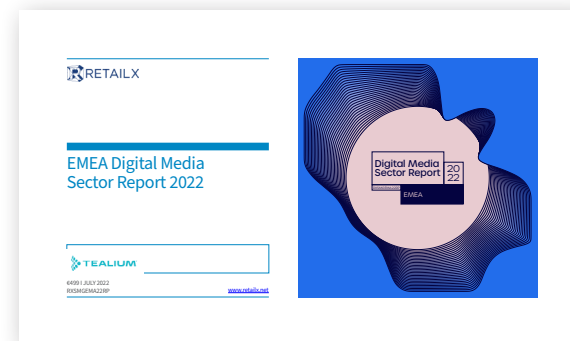
of sales. **This is leading to brands and retailers providing customers with richer content** such as videos mixing product inspiration, tutorials and unique experiences including AR and metaverse gamification. In the UK, 60% of GenZ shoppers say that AR experiences feel more personal and most (88%) are interested in using AR to try on makeup or clothes.



CONSUMER ELECTRONICS IN EMEA

Europe’s €112bn consumer electronics market is something of a conundrum. While it sells the latest high-tech, web-enabled gadgets – with laptops, smartphones and TV peripherals overtaking sales of radios and TVs for the first time in 2020 – **the sector is still dominated by instore sales.** Consumer electronics are such high-value purchases that shoppers want to touch and play with them before they commit. That isn’t to say that across Europe

tech itself isn’t playing a role in sales. **Much of the pre-purchase research is done online, with the final buy happening instore.** While the sector saw massive growth in 2020 during lockdown, this has now slowed, with the fastest growth rates happening in Eastern and Southern Europe as these regions play digital catch-up with the rest of Europe.



DIGITAL MEDIA

The EMEA media sector can be broadly looked at as physical and digital sales of digital games, music, video and books. **The digital portion generated \$294bn in sales globally in 2021**, accounting for around 80% of all sales of ‘media’ – with the exception of books.

Digital media sales across the EU massively outstrip those of Africa and the Middle East, with the **EU seeing sales of**

around €35bn in 2021, compared with €6.1bn in Africa and €4.2bn in the Middle East. The discrepancy is down to two factors: lower average disposable income across Africa and parts of the Middle East restrict uptake of digital services. It is a lack of broadband infrastructure in these regions that is really pulling them back.

Sustainability

Emma Herrod outlines how more and more consumers are demanding that retailers take environmental issues seriously

The number of retailers and brands sharing sustainability messaging on their ecommerce sites is increasing to a point where around half of the RetailX Global Elite 250 share something with consumers on the subject. However, while retailers within this group, which includes Apple and Carrefour, include a section on sustainability on their consumer-facing ecommerce sites, **only a small percentage give full details of their environmental targets**, how they plan to achieve them and provide specific sustainability policies.

Information such as ESG reports, carbon reports, modern slavery statements, full factory listings and supplier

Mind the lithium gap

The amount of lithium needed to meet exponential demand outstrips availability from mining. The consumer electronics industry has therefore had to embrace recycling to a much larger extent than many other sectors. As it turns out, this is very good for us all, since 70% of the world's total toxic waste comes from electronics manufacturing.

The consumer electronics market is highly susceptible to geopolitics. Since microchips are made in China, lithium for batteries comes from Russia and neon gas used in their production comes from Ukraine... you start to get a sense of scale of the problem.

codes of conduct are generally available to investors via corporate sites but not necessarily signposted from ecommerce sites where customers would look for it.

As is shown in consumer research, this is something that is becoming increasingly important as **shoppers actively investigate companies and their sustainability plans before making a purchase.**

Innovation in the beauty sector

Content online in the beauty sector is becoming richer, mixing product inspiration, tutorials and unique brand experiences such as AR and metaverse gamification. In the UK, 60% of GenZ shoppers say AR experiences feel more personal and most (88%) are interested in using AR to try on makeup or clothes.

How does this affect a mature omnichannel market such as the Netherlands? Here, consumers buy online due to convenience. 95% have a social profile and among the younger, digitally native population, 31% like to see messages about beauty and cosmetics on their Instagram feed.

Generation e-shop

47% of the UAE's millennials say they have bought beauty products online in the last 12 months.

Among a group of 156 European retailers that were assessed in 2021 and as part of an investigation into the Global Elite by RetailX in 2022, **the number of retailers with a dedicated sub-section for sustainability on their ecommerce site has risen by ten percentage points.** More than half (52%) now share some information about their sustainability ambitions with consumers.

46% go further and give details of how they plan to meet their sustainability goals. This is an increase from 40% in 2021. So while they are still in the minority, **the trend among European retailers is to share an increasing amount of information with shoppers.**

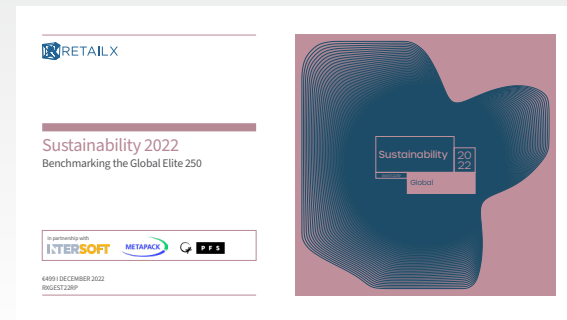
Interestingly, while the majority of companies within the Global Elite 250 manufacture or sell fashion and consumer electronics, these sectors of retailing are not the most likely to share comprehensive information about their sustainability targets, achievements and plans with consumers. This top ranking is held by jewellers and grocers.

Where fashion retailers do stand out is with the inroads they are making with product rental and resale, while consumer electronics companies are increasingly sharing how their products can be repaired, or setting up services to refurbish items for customers.

Both sectors have growing proportions of brands taking back products at the end of their useful life – again showing how companies are taking responsibility for scope 3 emissions. As examples, Zara is the latest fashion brand to set up a resale platform enabling customers to sell second-hand Zara garments to other customers while Apple has expanded its US-tested self-repair programme to Europe so that customers can mend their own iPhones and Macs.^[1]

Room for improvement within sustainability transparency

52% of the RetailX Global Elite 250 – which includes Apple and Carrefour – have a sustainability section on their consumer-facing ecommerce sites but only 10% of the Global Elite 250 share full details. This could be a mistake since sustainability is of growing importance to consumers. Up to 16% say they “often” look for information about a lifestyle brand’s sustainability practices before deciding whether to buy a product.



[1] <https://internetretailing.net/sustainability/how-uk-retailers-from-zara-to-morrisons-and-asda-are-taking-steps-to-reduce-their-carbon-emissions/www.selfservicerepair.com/hom>

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Reduce return rates



Eliminate redundant technology costs



Increase customer loyalty

Expert insight

James Barlow



Akeneo's UK director on building the foundation for omnichannel experiences

2022 was a big year for ecommerce. With global online spending projected to hit \$5.5tn by the end of the year and to surpass \$6.2tn in 2023, it's clear that pandemic lockdowns have accelerated the shift towards digital. Shoppers are headed online in droves and they're not looking back. Your audience pool is larger than ever as technology continues to break down geographical boundaries and allow retailers to open up their virtual shop doors to a worldwide market.

Whether your customers are searching on a retail platform, social media app, search engine, or utilising voice search or AI, they want to know they can find your brand. With thousands of options daily, it's crucial that your organisation makes the process of choosing your brand easy by tapping into shoppers' omnichannel habits and being visible on the channels they're already utilising.

However, while taking advantage of this global market can reap massive rewards, omnichannel success comes from the time-consuming work of setting up hundreds of new localisation processes for every product and channel.

A presence on these channels isn't enough. You must ensure that all the product information your customers are seeing is correct and up-to-date, regardless of where they've discovered you. This is especially true during the holiday shopping season.

Take, for example, luxury jewellery retailer, Tiffany & Co. There's a reason this brand has held onto its infamous legacy for almost two hundred years, and it's not entirely because of the signature blue box.

Tiffany's does a fantastic job of digitally replicating their in-person shopping experience by providing all the resources and information their customers need on every channel. Every product page on their own ecommerce site provides shipping and exchange information along with an option to speak directly with an associate. You know exactly what you're getting and when you're getting it.

Yet this is also true on third-party retail sites, such as Farfetch.com. Even though this sales channel isn't owned by Tiffany's, they're still able to provide all the product information a consumer could possibly need.

Customers must feel they can trust an organisation in order to make a purchase. This trust cannot be built if they are struggling to read or even find product descriptions, understand product data or view product assets.

Without a dedicated solution for managing product information, your omnichannel product activation efforts will be doomed from the start. When 66% of consumers say that bad product information would stop them buying

a certain brand, your organisation can't afford to have scattered and siloed product data.

Having a central repository for product information that seamlessly communicates with the other tools in your tech stack allows brands and retailers to create personalised customer experiences across all owned and unowned channels. This accelerates time-to-market, optimises product information for existing channels and makes joining new and emerging channels much more efficient.

Customers like knowing they're going the same digital experience on every channel and are looking for brands they can rely on. By focusing on the root of the issue – proper management of product information – your organisation can embrace shoppers' omnichannel habits by meeting them where they are, all while ensuring you're providing the best, most seamless experience possible.



Akeneo Product Cloud is a SaaS-based solution for orchestrating and optimising the product story across owned and unowned channels. By eliminating chaos and delays from siloed technologies, people and processes, your organisation will be able to deliver seamless and compelling experiences to customers at any place and time.

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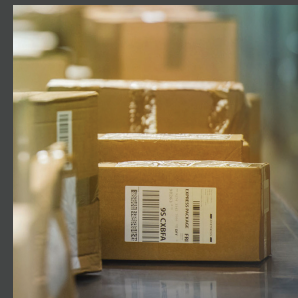
Tax complexity shouldn't stop you growing around the world

Expanding your business across international borders is a huge task, and there's a lot of moving parts you'll need to oversee to make sure things run smoothly. Why do it all alone?

Avalara supports some of the fastest growing businesses around the world. We have a huge range of helpful guides and digital solutions that can help you with everything from VAT calculations and returns to finding a fiscal representative and getting the right HS codes for international shipping.

- Reduce tax compliance risk
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- Ease of integration
- Smoother customs clearance
- Simplify manual tasks
- Delight your customer

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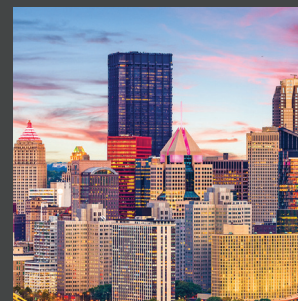
Are you selling far and wide to customers all over the world?

Your compliance duties mount as your business grows. Our range of cross-border solutions will easily and automatically handle everything from applying VAT and GST to flagging border tariffs and filing international taxes.



Are you selling into EU member states, from either within or outside the EU?

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Are you selling goods in the U.S. and Canada?

Stay on top of changes to tax jurisdiction boundaries and rules defining which of your products and services are taxable, with exact and instant calculations.

Expert insight

Sacha Wilson



Sacha Wilson, senior director at Avalara, argues that business expansion and cost efficiencies need to go hand in hand

For retailers, the idea of efficiency will be key in 2023. Over the last year, we've seen an increase in retail businesses either creating or expanding their online presence. To hold onto that growth, they need to enter an efficiency phase.

Scaling in a cost-effective, efficient way is crucial if a newly expanded business doesn't want to see its increased profits dip back down. In the current economic climate, we've even seen businesses laying off employees in the latter half of 2022 due to unsustainable levels of growth.

To avoid this, growth must take second place to efficiency and process improvement. As tax experts, the clearest example of this change we see is that when a company expands into new territories, they should create effective compliance measures before considering more expansion.

Ensuring that the correct HS codes are applied to products is a great way of doing this. Taking the time to implement an efficient and effective process for HS code application

(or to find an automated digital solution) can save a company a significant amount of money in customs fees with relatively little effort.

For retailers, tax and customs compliance aren't the only places that improvements can be made, although they are a key area for creating efficiencies. Since taking care of compliance helps avoid financial penalties and legal repercussions, it also helps protect your bottom line.

Matt Harrison



Matt Harrison, director at Avalara, explains why tracking changing regulations can help to boost profits

Legislation has changed faster in the last five years than ever before. The number of new requirements or processes your business now needs to account for is staggering. This is especially true of businesses that have expanded internationally: you also need to be aware of new customs rules wherever you're shipping to, as well as any new tax rules wherever your company has an established presence.

One of the most significant legislative trends we've seen is the introduction of simplified compliance rules. The

EU Import One Stop Shop (IOSS) scheme is one example, and the key thing is that IOSS can save you a lot of time and money with tax compliance. Companies need to be aware of IOSS (and other simplification schemes) to take advantage of them.

In the 12 months following the launch of IOSS in July 2021, UK businesses could have realised an estimated additional £5.2bn in export revenue – an average increase of 10.8% on total EU exports – had IOSS come earlier in the year.

So, when you expand into a new market, it's important to research as much as you can. However, it's equally important to keep that research going over time. While you don't need to keep a constant watch on all your business processes, you could save a huge amount of time and effort – and conserve profits – by revising your processes every two or three years.



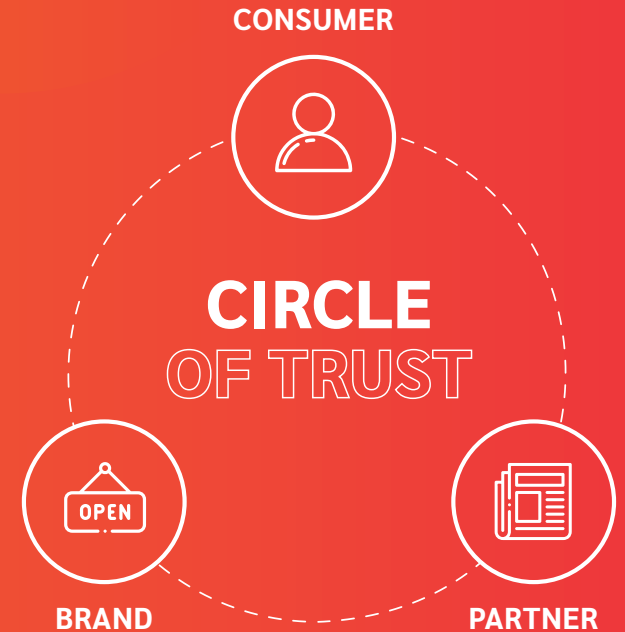
Avalara helps businesses of all sizes achieve compliance with transactional taxes via its automated cloud-based solutions. Each year, it processes billions of indirect tax transactions, files thousands of tax returns and manages millions of exemption certificates.

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ADVERTISING IS DEAD. CONSUMER TRUST IS GONE. WHAT NOW?

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And many more at [impact.com](https://www.impact.com)

Expert insight

Cutting through the noise



Owen Hancock, RVP Marketing – EMEA at impact.com, on how technology can free up marketers to focus on strategy

Faced with huge shifts in audience behaviour, conventional digital advertising has been struggling to keep up for some time. As consumers are constantly bombarded with advertising messages across multiple channels and devices, it's got hard – and is getting harder – for marketers to cut through all the noise.

Yet during this turbulent year, we saw growing numbers of retailers recognising that partnerships can offer a more authentic call to action – one that resonates at a time of increasing challenge for both consumers and brands. Through the likes of reviews sites, bloggers and influencers, for instance, retailers can turbo-charge campaign impact in a creative and cost-effective way, while making the most of synergies between brands, consumers and creators.

If you want to sell more running shoes, for example, there is an obvious synergy in partnering with content creators that focus specifically on running, rather than fitness in general. Nothing is too 'niche' and there are technology platforms out there to help find the best fit with your brand, product or service.

With more marketers waking up to this, in the new year we expect to see continued focus on those technology platforms that help businesses find the right creators and partners. There's an enormous volume of new talent in the partnership economy but it's not easy to find the perfect match without such technologies and it's been heartening to see some retailers recognise this.

In a broader sense, technology-enabled automation is about freeing up time for marketers to focus on strategy. For example, as defunct links and out-of-stock items rapidly deplete the value of ecommerce content, the flipside is that automatic link updates ensure websites remain relevant, up to date and profitable.

Meanwhile, integrations with ecommerce platforms such as Shopify can also give small- and medium-sized business owners access to global partners in just a few clicks. In 2023, macroeconomic pressures will make these types of integration increasingly critical as retailers look to boost efficiency and increase profit margins during the current acute cost of living crisis.

Essentially, partnerships boost trust, which is needed more than ever during these challenging times. At least one thing looks certain for the year ahead: we should expect more retailers to turn to innovative partnerships for personalised and trusted interactions. This, in turn, will usher in a new era of commerce. With new platforms and creators constantly emerging, we're looking forward to seeing more creative approaches as retailers continue to operate in tough market conditions. Necessity being, as always, the mother of invention!



impact.com is the world's leading partnership management platform. It is transforming the way businesses manage and optimise all types of partnerships – including traditional rewards affiliates, influencers, commerce content publishers, B2B and more.

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Expert insight

Lindsay McEwan



The Managing Director and Senior Vice President of Tealium in Europe recently discussed 2022 in a [RetailX webinar](#). Here are some of his key insights

What are your reflections on 2022?

In my lifetime working in technology, I've never seen such a volatile market as there was coming out of the pandemic. Retailers had, almost overnight, to change the way in which they dealt with the consumer. Organisations rushed to go online. The birth of the experiential retail business came along, where people were trying to engage with products from the safety and isolation of their own homes.

More recently, consumers are very worried. Inflation is rampant across Europe. Retailers are presented with almost an even bigger challenge than they had in the pandemic, which is reacting in an empathetic way to consumers in order to keep them spending, but without being irresponsible. In 2023, it will be very interesting to see how the shape of retail in Europe changes and how the retail environment globally changes too.

Marketplaces are now exerting a huge influence but don't typically share user data. How is this affecting retail?

With marketplaces, in essence you are passing the 'ownership' of the customer to the marketplace rather than it remaining with the brand. That's why it's absolutely critical that retail organisations think carefully about who owns that relationship with the customer. A marketplace might feel like a fulfilment channel that takes a huge amount of cost out of your bottom line but actually, you've just passed all consumer relationship to the marketplace and you're now akin a manufacturer.

Despite gaps, retailers can build granular detail of customers. Can this be used to build brand loyalty?

Yes, although the market presents a challenge to brands because we're seeing a real acceleration on interaction with brands through unconventional channels. And maybe not just one channel either. Organisations now have to monitor data from multiple channels to get a picture of how consumers are interacting with a brand, what they are saying about it and what they are buying from that brand. Brands have to monitor a spider's web of channels and make sure that they have one consistent voice across all of those channels – so more complexity and more cost.

How important is sustainability to customers?

We all want the latest iPhone and, traditionally, we have never really thought about what happened to our old ones. But organisations increasingly realise that having a

sustainable business is important, if only because the next generation of buyers will see this as a critical component of their relationship with them. Organisations need to have a voice, have a charter and be very open about how they are helping people move through the product life-cycle without impacting on the planet. Fast fashion seems to be at the forefront of this since shoppers aren't just focusing on the product but also how it's made, where it's made, who it's made by – and whether are they treated fairly.

One of the things the digital world has given us is a lot more information. Not all of it's true, though – let's remember that. But there is access to a lot of data that brands and product manufacturers have no control over. In such an environment, you need to wear your green credentials on your arm as a badge of honour, not treat them as an afterthought.



Tealium provides the industry standard platform for businesses aiming to unleash innovation with a real-time, universal data foundation. More than 850 companies trust Tealium to orchestrate their customer data. These include Domino's, Gap, IBM, Molekule, Epson America, Cambia Health, Orange, TUI, Rakuten, Sportsbet and Network 10.
www.tealium.com

Datagraphic highlights

This year, with every report RetailX produced, we asked our editors to gather together some of the key numbers thrown up by their research. The idea is that readers can see at a glance the numbers that piqued our interest in 2022, whether because they were commercially telling or, frankly, simply interesting.

Over the following pages, we have collated the majority of these 'datagraphics'. Please do use this data in your own reports and presentations.

To learn more about the work of RetailX research, visit: <https://retailx.net>

Contents

RetailX Global Ecommerce Report 2022	24
Europe Ecommerce Region Report 2022	25
RetailX Middle East Region Report 2022	26
RetailX Benelux Ecommerce Region Report 2022	27
Nordics Ecommerce Region Report 2022	28
Latin America Ecommerce Region Report 2022	29
Germany Ecommerce Country Report 2022	30
RetailX USA Ecommerce Country Report 2022	31
France Ecommerce Report 2022	32
The DeliveryX UK Top500 2022 Report	33
RetailX UK Growth 2000 202	34
RetailX Top1000 Europe 2022	35
Growth 3000 Europe 2022	36
RetailX Brand Index Europe 2022	37
RetailX United Kingdom Top500 2022	38
Global Elite 1000 Report 2022	39
RetailX Sustainability 2022	40
RetailX Sustainability 2022, 2nd Datagraphic	41
Global Luxury Sector Ecommerce Report 2022	42
Fashion Sector Ecommerce Report 2022	43
Beauty & Cosmetics Report 2022	44
EMEA Digital Media Sector Report 2022	45
RetailX UK Beauty Ecommerce Report 2022	46
European Sports Goods Sector Report 2022	47

RetailX Global Ecommerce Report 2022

The RetailX Ecommerce Report series offers a retail-focused overview of the state of ecommerce in key countries and regions. The reports blend data from ecommerce and trade associations with national and government data, our own exclusive research and other sources. The Global report also explores how the world's ecommerce regions interact.

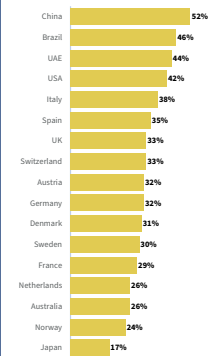
72%

of Brazilians see sustainability as an important factor when making purchases

66%

of Millennials says their purchasing decisions are influenced by whether products are sustainable

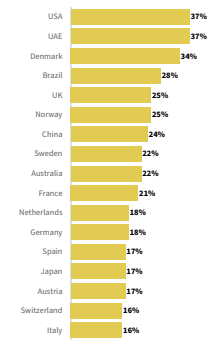
Consumers willing to pay a sustainability premium
Selected countries, 2021



Source: Simon-Kucher & Partners, Global Sustainability Study 2021

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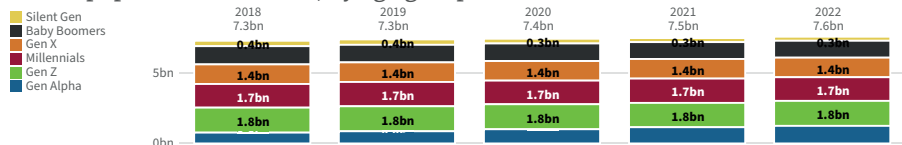
Average sustainability premium consumers are willing to pay
Selected countries, 2021



Source: Simon-Kucher & Partners, Global Sustainability Study 2021

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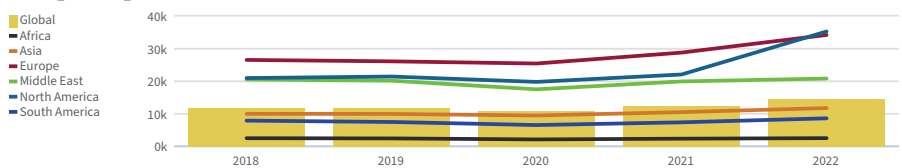
Global population structure, by age group



Age groups (year of birth): Gen Alpha (2013-present), Gen Z (1998-2012), Millennials (1983-1997), Gen X (1968-1982), Baby Boomers (1948-1967), Silent Gen (1928-1947)
Source: RetailX, drawing on data from UN

© RetailX 2022

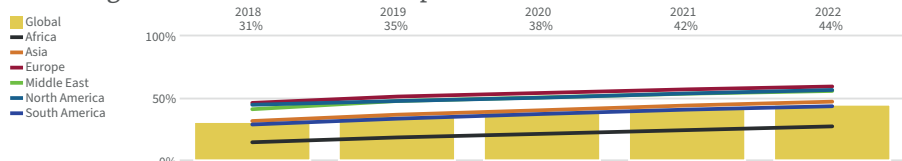
3DP per capita (\$)



Source: RetailX, drawing on data from IMF

© RetailX 2022

Percentage of internet users who shop online



Source: RetailX, drawing on data from Statista

© RetailX 2022

Global growth in ecommerce has slowed since the height of the Covid-19 pandemic, but the underlying trend is positive. As we explore in the *RetailX Global Ecommerce Report 2022*, there are opportunities across the globe, whether that's to make incremental improvements in market share in developed regions such as Europe or to enter higher-growth developing countries, such as those in Africa, Asia and the Americas.



<https://internetretailing.net/reports/retailx-country-reports/global-2022-ecommerce-region-report/>

\$1.3k

The average annual online spend of Chinese e-shoppers

81%

of those online in the United Kingdom shop via ecommerce

47%

of e-shoppers in Canada are between 25 and 44 years old



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Europe Ecommerce Region Report 2022

The RetailX Ecommerce Report series offer a retail-focused overview of the state of commerce in key countries and regions. The report blends data from ecommerce and trade associations with national and government data, our own exclusive research and other sources.



The European ecommerce and multichannel retail sector is among the most sophisticated in the world. Nevertheless, as we explore in our Europe Ecommerce Region Report, 2022 was already set to be a challenging year – even before the conflict in Ukraine began to impact on costs and on global supply chains. Opportunities still exist, but it is arguably more important than ever for brands and retailers to be sure their strategic approach is innovative, robust and realistic.

<https://internetretailing.net/reports/retailx-country-reports/europe-2022-ecommerce-region-report>



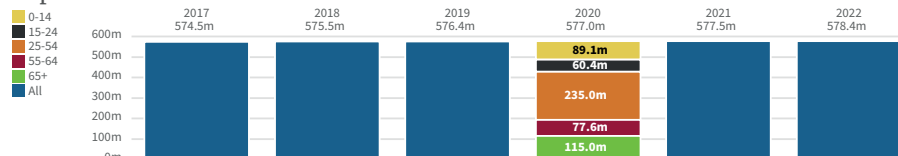
64%

of UK e-shoppers used a smartphone to shop online in 2021

38%

of Danish consumers cite price as the main reason to shop online

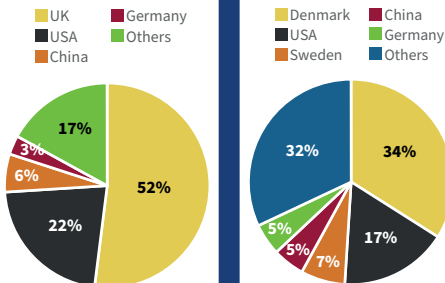
Population structure



Source: RetailX, drawing on data from IMF and The World Factbook

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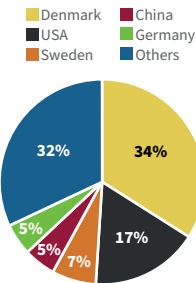
Where the UK Largest 100 are based



Data based on 52 of the Largest 100 retailers
Source: RetailX

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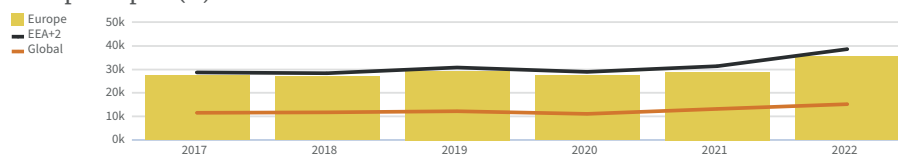
Where the Denmark Largest 100 are based



Data based on 79 of the Largest 100 retailers
Source: RetailX

© RetailX 2022

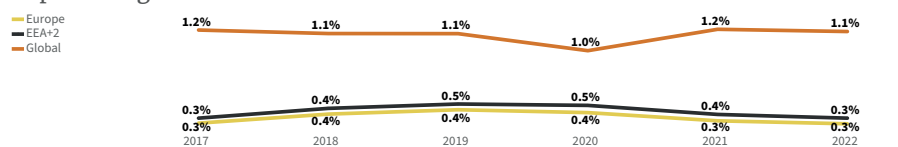
GDP per capita (€)



Data for EEA+2 includes all current EEA members in addition to the UK and Switzerland
Source: RetailX, drawing on data from IMF

© RetailX 2022

Population growth



Data for EEA+2 includes all current EEA members in addition to the UK and Switzerland
Source: RetailX, drawing on data from IMF

© RetailX 2022

85%

of Spanish e-shoppers have purchased a product online after seeing it advertised or reviewed via social media

69%

of Belgian ecommerce revenue comes from domestic shopping

45%

of retailers in Switzerland offer in-store pickup of online purchases

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RetailX Middle East Region Report 2022

The RetailX Ecommerce Report series offers a retail-focused overview of the state of commerce in key countries and regions, blending data from ecommerce and trade associations with national and government data, our own research and other sources.

The countries of the Middle East represent a diverse region of fast growing ecommerce markets with differing levels of maturity and unique business considerations. Six countries – Iran, Israel, Qatar, Saudi Arabia, Turkey and United Arab Emirates – highlight the similarities and differences of the region. For more insights, download the full report at: <https://internetretailing.net/reports/retailx-country-reports/the-middle-east-2022-ecommerce-country-report/>



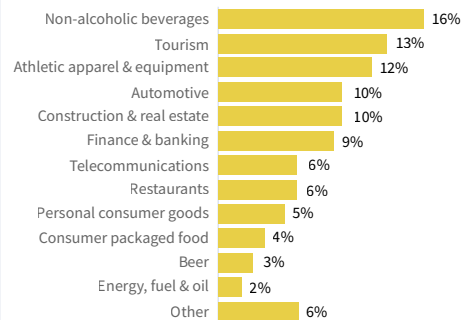
\$4,350

average annual online spend by consumers in Qatar, the highest in the region

\$26.11bn

value of Turkey's ecommerce market, the largest in the region

Sponsorship spending on the FIFA World Cup 2022, by category



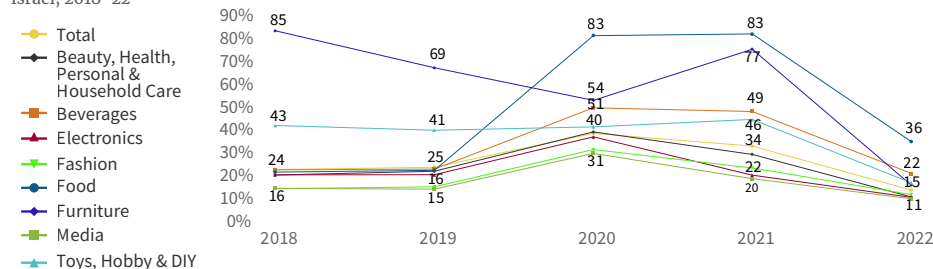
Note: Research conducted Jan 2022

Source: Nielsen

© RetailX 2022

Annual change in revenue for the online ecommerce market (%)

Israel, 2018-22

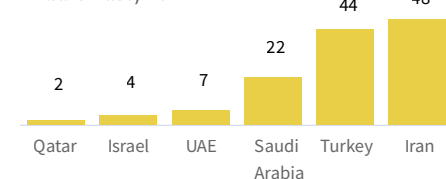


Source: Statista

© RetailX 2022

Number of e-shoppers (in millions)

Middle East, 2022



Source: Statista

© RetailX 2022

Sources of brand discovery

UAE, 2022



Source: We are social, Kepios. Accessed via Datareportal

© RetailX 2022

6%

of web traffic to Iran's leading retailers comes from outside of the country

70%

of consumers in the UAE prefer to shop on smartphones

RetailX Benelux Ecommerce Region Report 2022

The RetailX Ecommerce Sector Report series offers a retail-focused overview of the state of commerce in a range of sectors, both globally and by country, blending data from ecommerce and trade associations with national and government data, our own research and other sources.

€30.6bn

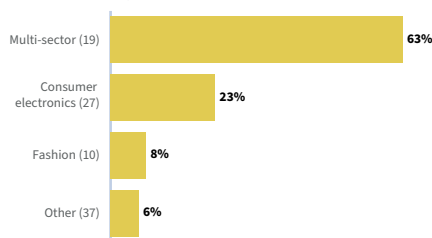
Netherlands' annual ecommerce market revenue, the largest in Benelux

43%

of web traffic from the Benelux region goes to retailers with US headquarters

Web traffic in Benelux, by sector

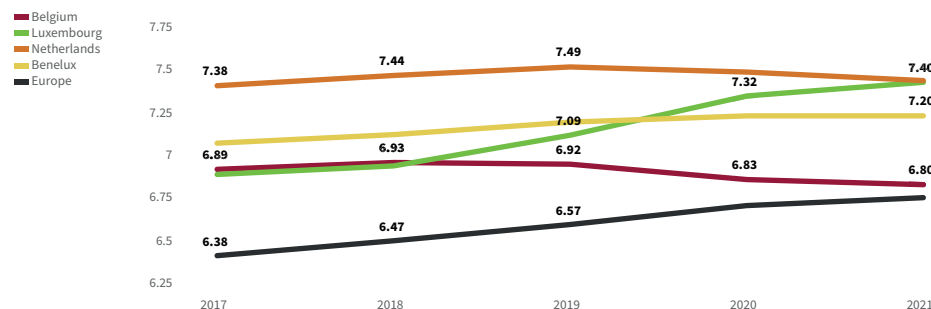
Web visits of local consumers to the Benelux Largest 100 retailers



Note: The number of retailers in a sector is shown in parentheses. Source: RetailX, drawing on data from SimilarWeb

CC BY ND RetailX 2022

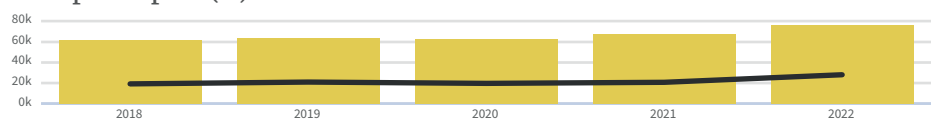
Happiness Index Benelux, 2017-21



Survey respondents evaluate the quality of their current lives on a scale of 0 (unhappy) to 10 (happy)
Source: The World Happiness Report

CC BY ND RetailX 2022

GDP per capita (€)



Source: RetailX, drawing on data from IMF

CC BY ND RetailX 2022

72%

of Luxembourg's population has shopped cross-border online

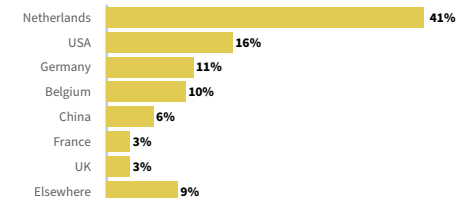
Discover the extent of internet usage in the Benelux region, the percentage of internet users shopping online, development of the market and consumer preferences in Belgium, Luxembourg and the Netherlands.



Why has cross-border trade developed to be a major share of ecommerce, which product categories are bought most often online, how are payment methods changing in these mature markets and how is sustainability altering the competitive final mile? Company profiles highlight Amazon Belgium, bol.com and Kruidvat.

Download the RetailX Benelux Ecommerce Region Report 2022 at <https://internetretailing.net/reports/retailx-country-reports/2022-benelux-ecommerce-region-report/>

Where the Benelux Largest 100 are based



Source: RetailX, drawing on data from SimilarWeb

CC BY ND RetailX 2022

58%

of web traffic to Benelux-based Top50 retailers originates outside the region

RetailX in partnership with:

akeneo

SCAYLE[®]
COMMERCE ENGINE

TEALUM

Nordics Ecommerce Region Report 2022

The RetailX Ecommerce Report series offers a retail-focused overview of the state of commerce in key countries and regions, blending data from ecommerce and trade associations with national and government data, our own research and other sources.

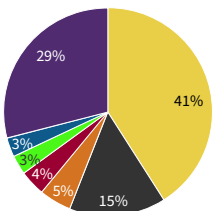
31%

of Swedish consumers prefer to be invoiced for ecommerce purchases

52%

of Danish consumers prefer to pay by card for ecommerce purchases

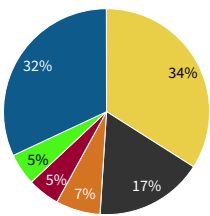
Countries where the Sweden Largest 100 retailers are based



Source: RetailX

cc i RetailX 2022

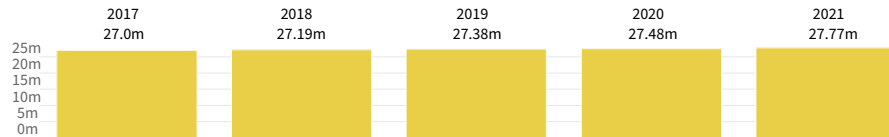
Countries where the Denmark Largest 100 retailers are based



Source: RetailX

cc i RetailX 2022

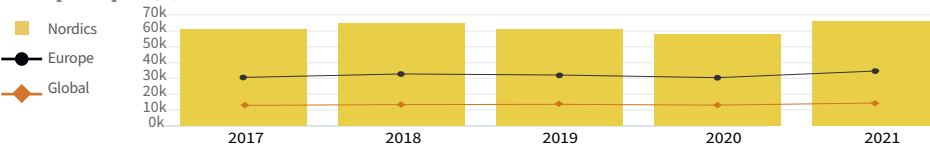
Population structure



Source: RetailX, drawing on data from the International Monetary Fund

cc i RetailX 2022

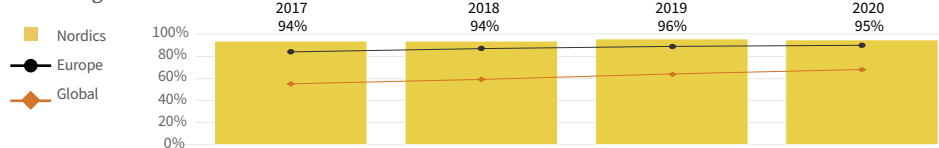
GDP per capita (\$)



Source: RetailX, drawing on data from the International Monetary Fund

cc i RetailX 2022

Percentage of internet users



Source: RetailX, drawing on data from the World Bank

cc i RetailX 2022

The Nordic nations represent some of the most sophisticated digital economies in the world. Citizens of the five Nordic nations – Denmark, Finland, Iceland, Norway and Sweden – are wealthy by global standards, making this a rewarding region for those that can tailor their offerings to these markets.



For more insights, download the full report at: <https://internetretailing.net/retailx-country-reports/nordics-2022-ecommerce-region-report>

13%

of Danes shop online at least once a day

42%

of Norwegian e-shoppers bought from Zalando in the past year

33%

of Finnish online shoppers say they buy fashion apparel and accessories via ecommerce



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Latin America Ecommerce Region Report 2022

The RetailX Ecommerce Report series offers a retail-focused overview of the state of commerce in a range of countries, blending data from ecommerce and trade associations with national and government data, our own research and other sources.

50%

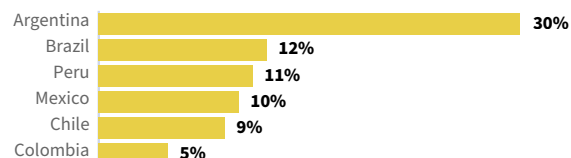
of internet users
shop online

Ecommerce
revenue index =

351

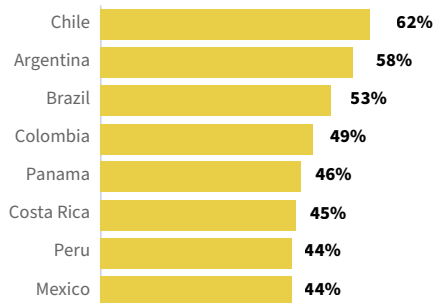
Share of ecommerce
spending via
digital wallets,
Latin America, 2021

Source: Statista



© ⓘ ⓘ RetailX 2022

Share of eshoppers in Latin
America, 2021

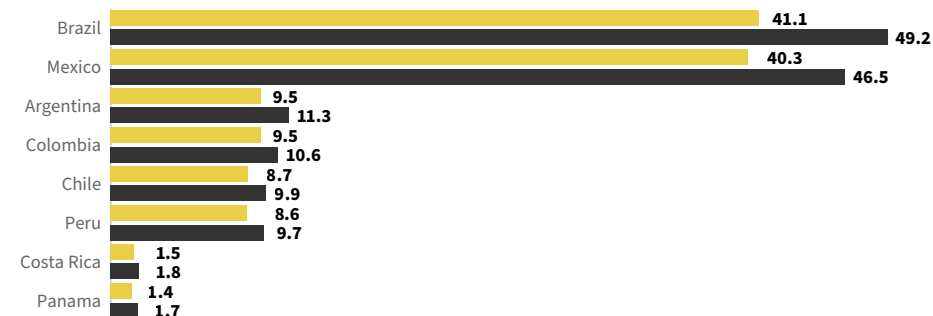


Source: Statista

© ⓘ ⓘ RetailX 2022

Ecommerce sales revenue in Latin America, 2021-22 (\$bn)

■ 2021 ■ 2022



Source: Statista

© ⓘ ⓘ RetailX 2022

With a focus on eight key Latin American markets including Argentina, Brazil, Chile, Colombia, Costa Rica, Panama and Peru, this report shows how varied the ecommerce landscape is in these countries alone. Brazil remains the market leader in terms of growth, as well as sheer volume of sales, but it's Chile that has the highest share of consumers shopping online. The potential in all markets however makes Latin America a key market for expansion, providing that brands and retailers understand the challenges involved. To understand more about the potential download the RetailX Latin America Ecommerce Region Report 2022 at retailx.net



79%

percentage of
internet users

RetailX in partnership with:

WORLDLINE

Germany Ecommerce Country Report 2022

The RetailX series of Ecommerce Country Reports offers a briefing on the ecommerce and multichannel landscape in countries and regions around the world. Germany is a key European market with distinctive characteristics.

- Internet Inclusive Index ranked 12/120 for readiness
- Internet Inclusive Index ranked 25/120 overall
- Global leader for Logistics Performance Index



Find out how big the German market is, what customers want to buy, how they want to pay and how they prefer to get delivery.



Plus, find out about attitudes to returns and the role of sustainability in delivery and returns.

The Largest 100 retailers are also explored in this report. And we feature company spotlights on Lidl, Saturn, Shop Apotheke and Zalando.

Download the report at <https://internetretailing.net/reports/retailx-country-reports/germany-2022-ecommerce-country-report/>

94%

used PayPal to pay online in the last year

52%

prefer home delivery with signature

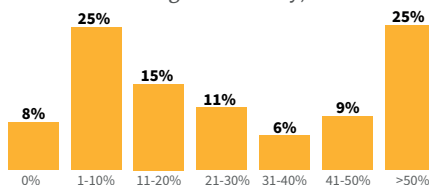
55%

say cost of delivery is important

95%

of German online stores have a Facebook page

The premium as a percentage of product cost that German consumers are willing to pay for carbon neutral or green delivery, 2021

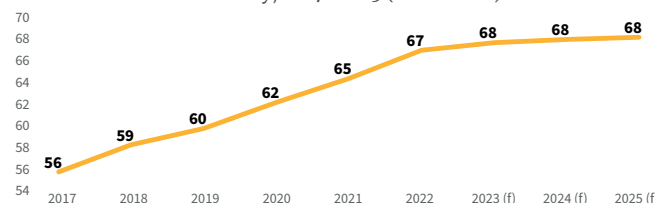


Note: Results include 1000 16+ Germany respondents and are stratified by age and gender. Survey conducted in January 2021.

Source: RetailX

© RetailX 2022

Ecommerce users in Germany, 2017–2025 (in millions)



Note: The ecommerce market comprises the sale of physical goods via a digital channel to a private end consumer (B2C). This definition encompasses purchases via desktop computers as well as purchases via mobile devices. All figures are estimate. Data current as of February 2022.

Source: Statista Digital Market Outlook. Accessed via Statista

© RetailX 2022

86%

have been influenced to buy after seeing a product on social media

20%

would use ten-minute delivery for the occasional full grocery shop

44%

would consider longer delivery times to improve sustainability

41%

want to return or exchange online items instore

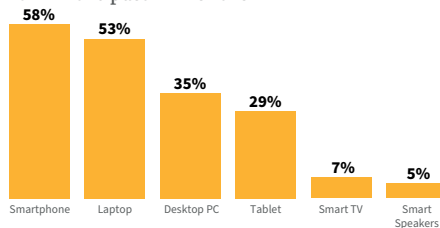
58%

use their smartphone to shop online

33%

consumers buy on social media

Devices used for online shopping in Germany, 2021 in the past 12 months

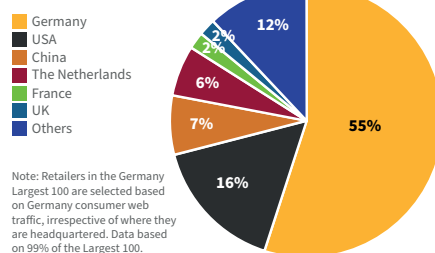


Note: 2,522 online respondents in Germany who shop online. More than one answer possible. Data updated to October 2021.

Source: Statista Global Consumer Survey

© RetailX 2022

Countries where the Germany Largest 100 retailers are based



Note: Retailers in the Germany Largest 100 are selected based on Germany consumer web traffic, irrespective of where they are headquartered. Data based on 99% of the Largest 100.

Source: RetailX

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Metric
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RetailX USA Ecommerce Country Report 2022

The RetailX series of Ecommerce Country Reports offers a briefing on the ecommerce and multichannel landscape in countries and regions around the world. The USA is one of the world's most important markets.



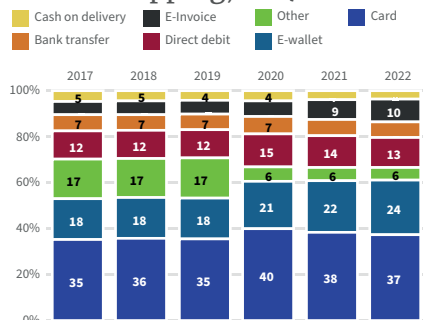
\$1 Trillion

Record-breaking revenue figure reached by the US ecommerce market in 2022

25%

of US consumers prefer to shop online rather than offline

Preferred payment type for online shopping, 2017-22



Source: Statista

CC BY ND RetailX 2022

Articles bought online

The 10 most popular categories purchased online, 2022



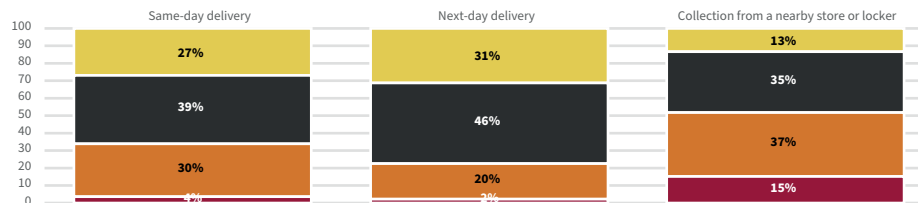
Based on 485 residents of the USA aged 18 and over, August 2022. Results are stratified by age and gender. Question: "What do you shop for online?"

Source: RetailX Consumer Observatory

CC BY ND RetailX 2022

How important is it that online retailers provide the following? 2022

Very important Important Unimportant Entirely insignificant



Based on 485 residents of the United States aged 18-64, August 2022. Results are stratified by age and gender. Question: "How important to you is it that online retailers provide the following?"

Source: RetailX Consumer Observatory

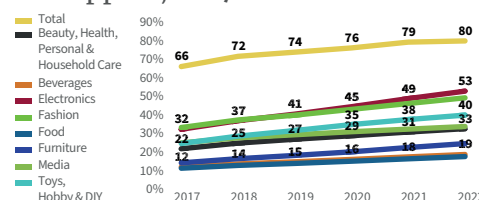
CC BY ND RetailX 2022

- Find out about the US ecommerce and multichannel market, how it differs from other territories, and how its consumers are among the wealthiest and most demanding in the world.
- We investigate current attitudes to product choice, delivery, returns and sustainability – and how the field is evolving.
- We explore some of the innovations that make the USA the world's commercial powerhouse.
- Featuring company spotlights on Apple.com and Target.com, with market insight from international freight forwarder DG.



Download the RetailX USA Report 2022 at retailx.net

Percentage of ecommerce shoppers, 2017-21



Source: Statista

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49%

are influenced by content creators when buying products

RetailX in partnership with:



France Ecommerce Report 2022

The RetailX series of Ecommerce Country Reports offers a global briefing on the ecommerce and multichannel landscape. The France Ecommerce Sector Report is an online retail-focused overview, using data from ecommerce and trade associations, national and government data and our own research and insight.



48m

ecommerce users
in 2021

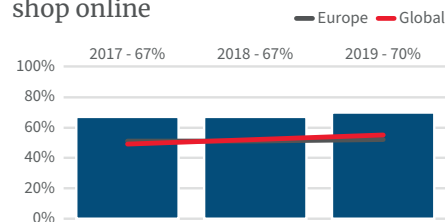
83%

of French citizens have
access to the internet

74%

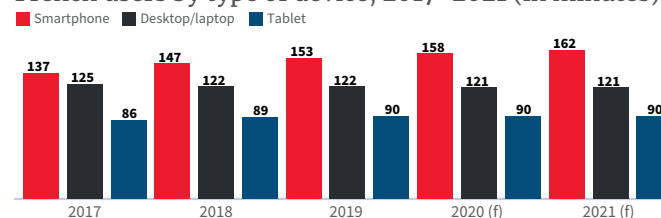
of French internet users
have shopped online

Percentage of internet users who shop online



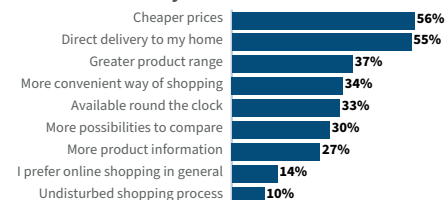
Data for Europe includes UK, France, Germany, Russia, Italy and Norway
Data for Global includes the countries in the RetailX Global Report 2021
Source: RetailX, drawing on data from Eurostat
© RetailX 2022

Average time spent daily on internet media devices by French users by type of device, 2017-2021 (in minutes)



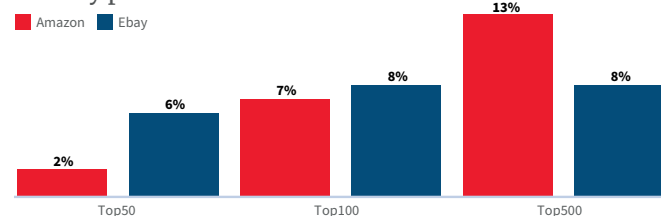
Note: Data sourced from an online survey to 18+ years old residents of France who used each medium at least once a month.
Data current as of May 2019.
Source: eMarketer. Accessed via Statista
© RetailX 2022

Which of these do you consider good reasons to buy an item online?



Note: Results include 2062 French respondents. Respondents could select multiple answers. Data current as of November 2021.
Source: Statista Global Consumer Survey
© RetailX 2022

Share of French online stores with additional Amazon or eBay profiles



Note: Based on the top 500 online stores by net sales in France in 2020 for which information is available.
Data current as of October 2021.
Source: ecommerceDB
© RetailX 2022

France has the second-biggest economy in the Eurozone and the highest government spending. With a focus on startups, it will be interesting to see how the ecommerce market develops over the next few years. Download the full report <https://internetretailing.net/reports/retailx-country-reports/france-2022-ecommerce-country-report/>



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The DeliveryX UK Top500 2022 Report

The DeliveryX UK Top500 2022 Report ranks the best 500 retailers and brands by their approach to Operations & Logistics, enabling us to give space and recognition to the importance of Operations & Logistics, as well as highlighting editorially the retailers of note that stand out in these areas

Read the full report to find out more about the level to which retailers are themselves showcasing Operations & Logistics, not just as a service to customers but also as an experience. This has moved from being a way to get product into a customer's hand to a delivery experience that is almost as immediate and friction-free as the ordering process itself. Click and collect from Screwfix in one minute, or a pharmacy delivering medication in 30 minutes are setting new consumer expectations.

[Download the full report at retailx.net](#)



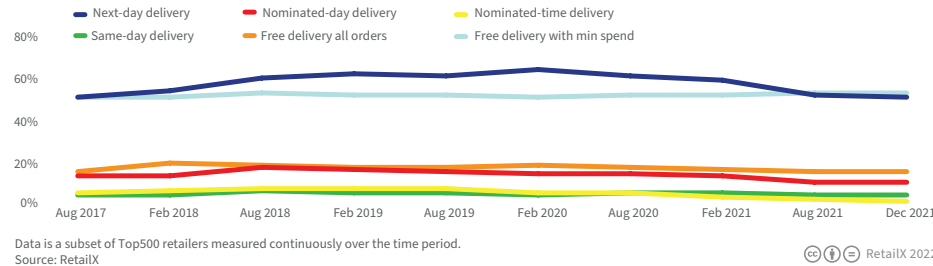
75%

of beauty & cosmetic retailers offer next-day delivery

47%

of the Top500 retailers allow customers to click and collect

The percentage of the Top500 offering delivery services



64%

of consumers want retailers to remove plastics and packaging to help them adopt more sustainable shopping habits

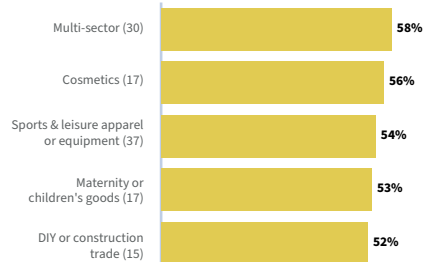


£75.30

is the average free delivery threshold

RetailX in partnership with:

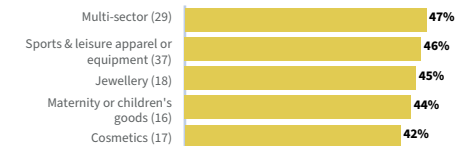
Percentage of UK Top500 retailers offering collection, by sector



The number of retailers considered per category is shown in parentheses. Source: RetailX

CC BY ND RetailX 2022

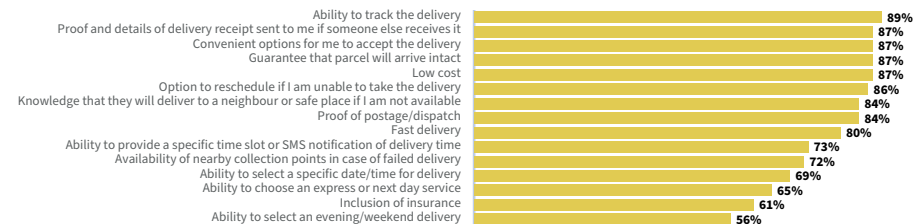
Percentage of UK Top500 retailers offering reserve and collect, by sector



The number of retailers considered per category is shown in parentheses. Source: RetailX

CC BY ND RetailX 2022

Important factors for people when receiving parcels in the UK



Note: Results include 1,843 UK respondents who are postal consumers. Survey conducted from Q3 2020 to Q2 2021. Source: Ofcom. Accessed via Statista

CC BY ND RetailX 2022

RetailX UK Growth 2000 2022

The Growth 2000 report explores the depth and breadth of the 2,000 retailers that follow on from the RetailX UK Top500.

RetailX research assesses practical performance through four drivers of growth: Find, Mobile, Delivery and Checkout.

RetailX UK Growth 2000 illustrates the performance of up-and-coming retailers, brands and marketplaces that sell to the UK through:

- 75 metrics over eight years, benchmarking 2,000 retailers, brands and marketplaces.
- and features case studies on retailers and brands from MyProtein and Revolution Beauty to Wheelspin Models and Liverpool FC.

Download it at: internetretailing.com/uk/

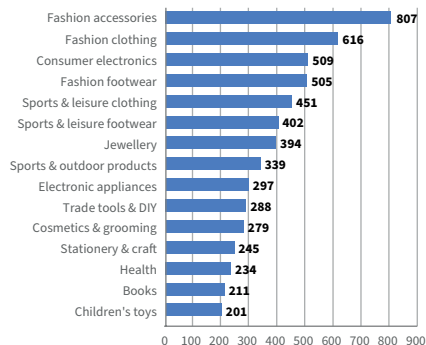


23%
primarily sell fashion

50%
offer wishlists

What do Growth 2000 retailers sell?

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



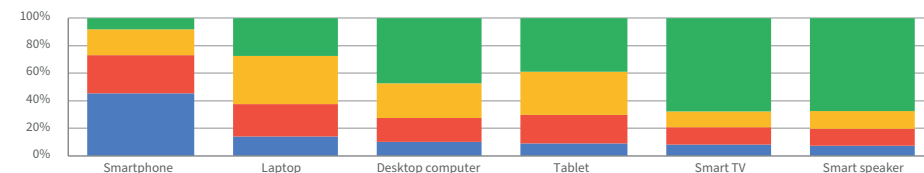
Categories that include at least 200 retailers are shown. Note that some retailers sell in multiple categories
Source: RetailX

CC BY NC ND RetailX 2022

Device usage for online shopping

How often people use a device type for online purchases

■ Never ■ Some of the time ■ Most of the time ■ All of the time



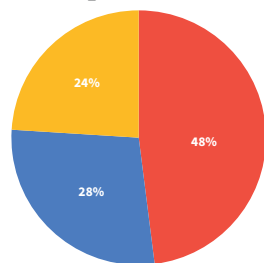
Based on 738 surveyed residents of the UK, aged 16 and over, who shop online at least once a year. Question: "Thinking about your online purchases in the last 12 months, how frequently on average did you use the following devices for online shopping?"
Source: RetailX Consumer Observatory, June 2022

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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

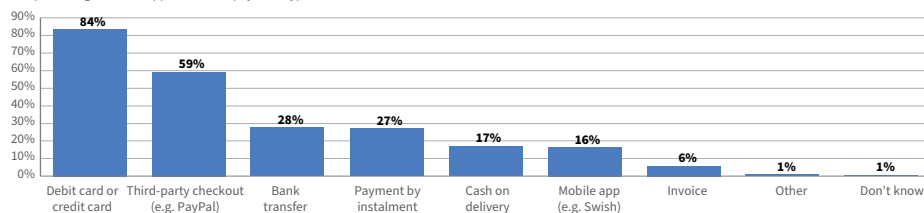
■ Brands ■ Retailers ■ Marketplaces
Brands are defined as retailers that mostly sell own-label products, and marketplaces as ecommerce websites that host third-party sellers
Source: RetailX



CC BY NC ND RetailX 2022

Online payment methods used in the past 12 months

The percentage of UK shoppers to use a payment type in the last 12 months



Based on 738 surveyed residents of the UK, aged 16 and over, who shop online at least once a year. Question: "Which online payment methods have you used in the past 12 months?"
Source: RetailX Consumer Observatory, June 2022

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42%

enable shoppers to share products over social



48%

show product star ratings

RetailX in partnership with:

amazon supply chain

DEKO GFS

MOVABLE INK

SHIPENGINE

RetailX Top1000 Europe 2022

The RetailX series of ranking reports has tracked the development of online and multichannel retail in the UK since 2014 and in Europe since 2015.

RetailX research assesses practical performance through six Dimensions: The Customer, Engagement, Mobile & Cross-channel, Merchandising, Operations & Logistics and Strategy & Innovation

14%

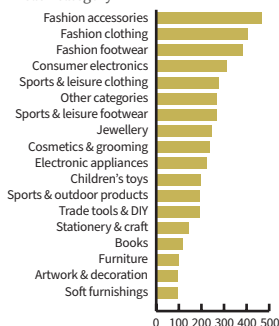
offer same-day collection

28%

primarily sell fashion

What do the Top1000 retailers sell?

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

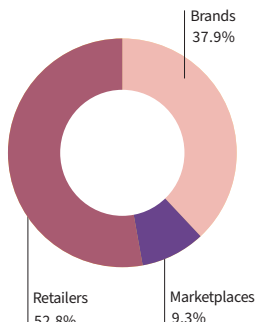


Source: RetailX



Business types

The percentage of Top1000 companies that are brands, marketplaces and retailers

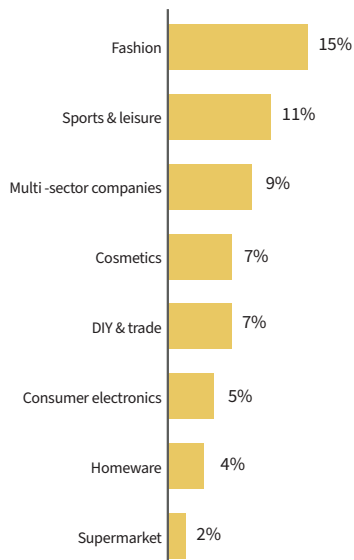


Source: RetailX



One-click ordering

Share of retailers in a sector offering the service

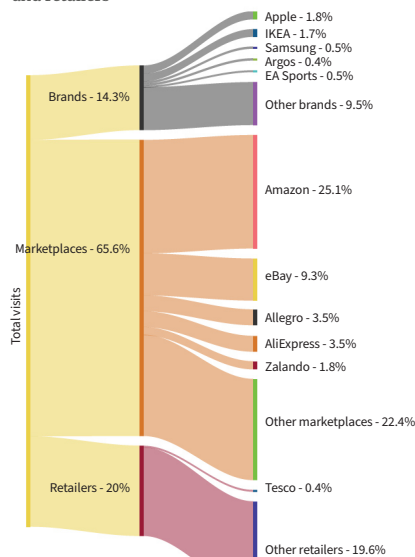


Source: RetailX



The split of European web traffic

The percentage of visits from European consumers to the Top1000, divided into brands, marketplaces, and retailers



Source: RetailX



Congratulations to the RetailX Top1000 Europe Elite retailers of 2022: Amazon, Boots, L'Occitane, H&M and Stradivarius

This year's report brings together insights from:

- 1,000 companies, 300 metrics and seven years of analysis
- Practical examples from Top1000 retailers and brands including Amazon (Germany), Boots, L'Occitane, H&M, Stradivarius and Euronics

Download the
RetailX Top1000
Europe 2022 at:
retailx.net/rxeu



44%

of mobile websites
feature store finders



83%

enable shoppers to filter
searches by brand

53%

of the Top1000
are retailers

38%

of the Top1000
are brands

9%

are
marketplaces

42%

use videos to
illustrate products

RXEU
TOP1000

TEALUM

Growth 3000 Europe 2022

The Growth 3000 report explores the depth and breadth of the 3,000 retailers that follow on from the RetailX Top 1000 Europe.

RetailX research assesses practical performance through four drivers of growth: Find, Mobile, Delivery and Checkout.

50%

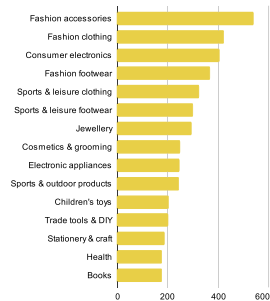
offer wishlists

22%

primarily sell fashion

What do Growth 3000 retailers sell?

The percentage of retailers that sell a significant number of products in a category



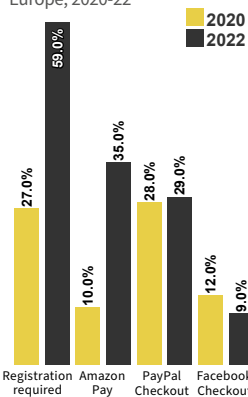
Categories that include at least 150 retailers are shown. Note that many retailers sell in multiple categories

SOURCE: RetailX

© 2022 RetailX 2022

Streamlined checkout options

Europe, 2020-22

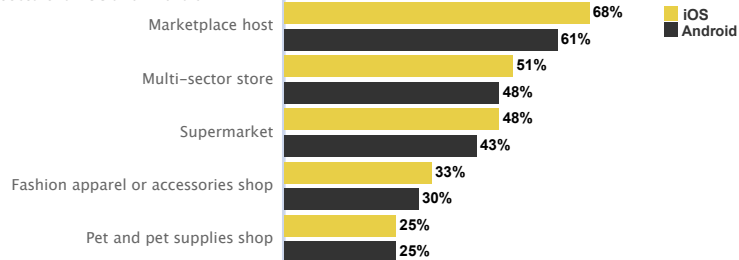


SOURCE: RetailX

© 2022 RetailX 2022

Sectors in which retailers offer mobile apps (%)

Top 5 sectors for iOS and Android

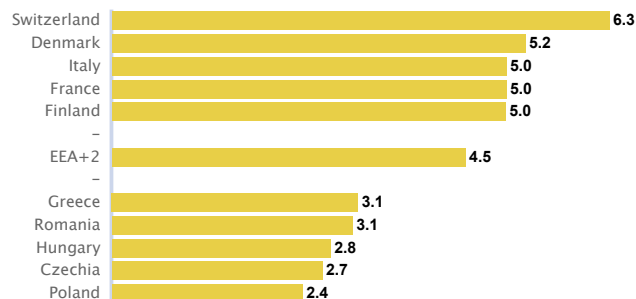


SOURCE: RETAILX

© 2022 RetailX 2022

Standard delivery cost (median €)

The most and least expensive countries in Europe



Note: Countries with 30 or more researched retailers have been included
Data for EEA+2 includes all current EEA members in addition to the UK and Switzerland

SOURCE: RETAILX

© 2022 RetailX 2022

20%

have iOS apps

65%

are retailers

30%

are brands

5%

are marketplaces

The Growth 3000 illustrates the performance of up-and-coming retailers, brands and marketplaces that sell to 32 markets – the EU, EEA plus the UK and Switzerland

- 63 metrics, over six years, in 32 countries, benchmarking 3,000 retailers, brands and marketplaces
- features case studies on retailers from Furniture Box in Sweden to Venca in Spain, from Jacob in Germany to Bugaboo in the Netherlands and from Better World Books in the US to Neal's Yard Remedies in the UK

Download it at:
internetretailing/rxgeu



€3.48

average cost of collection

Free

median cost of collection



In partnership with

amazon shipping

Avalara

Tax compliance done right



SHIPENGINE®



RetailX Brand Index Europe 2022

The RetailX Brand Index Europe lists the 500 leading brands that sell in Europe. The list is based on a performance-led assessment of their ecommerce and multichannel business through six Dimensions: The Customer, Engagement, Mobile & Crosschannel, Merchandising, Operations & Logistics and Strategy & Innovation

66%

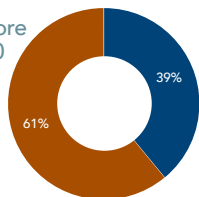
require shoppers to register to checkout

308

of the Top500 brands sell fashion accessories

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

■ Yes ■ No

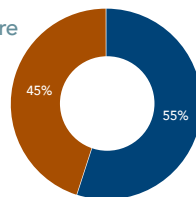


Source: RetailX

© ⓘ ⓘ RetailX 2022

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

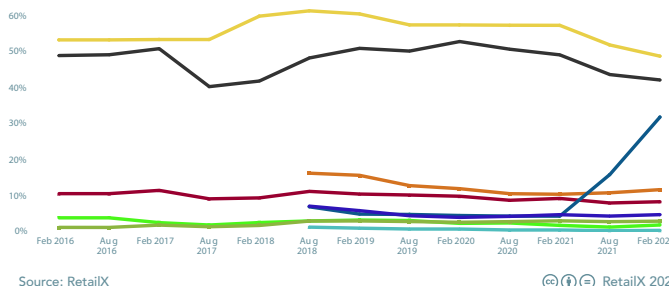
■ Yes ■ No



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

The percentage of brands offering a fulfilment service

■ Click and collect
■ Next-day delivery
■ Next-day collection
■ Nominated-day delivery
■ Nominated-time delivery
■ Reserve and collect
■ Same-day collection
■ Same-day delivery
■ Store-owned collection



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

Source: RetailX

© ⓘ ⓘ RetailX 2022

3%

offer live chat

30%

have iOS apps

23%

have Android apps

10%

app links on landing page

Congratulations to the RetailX Brand Index Europe 2022 Elite: Claire's, H&M, L'Occitane, Marks & Spencer, and Tripp

This year's report brings together insights from:

- 300 metrics, 500 companies and five years of analysis
- features practical examples from leading brands including Givenchy, The Body Shop, Disney, Lascana and Pandora

Download it at:
internetretailing.net/rxbx



€4.76

average cost of standard delivery



€68.90

average spend for free delivery



RetailX United Kingdom Top500 2022

The RetailX Top500 series of reports has tracked the development of online and multichannel retail in the UK since 2014

RetailX research assesses practical performance through six Dimensions: The Customer, Engagement, Mobile & Crosschannel, Merchandising, Operations & Logistics and Strategy & Innovation

50%

support
collection

25%

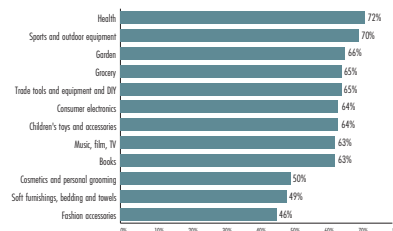
primarily sell
fashion

Retailers sharing product reviews, by sector

Retailers selling health products are most likely to show customer feedback on their websites, possibly because shoppers buying these prefer to have information from a range of sources

Source: RetailX

© ⓘ ⓘ RetailX 2022



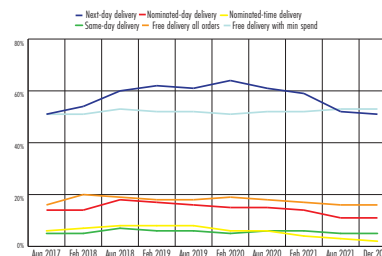
How Top500 delivery services changed over five years

Next-day delivery has declined in popularity since the pandemic while other fulfilment services had already plateaued or begun to decline

It is likely that fulfilment providers have felt the strain of the pandemic-induced surge in demand for online ordering but if so, there has not been a corresponding, sharp reduction in rapid and convenient delivery options. Note that this data is a subset of Top500 retailers measured continuously over the time period.

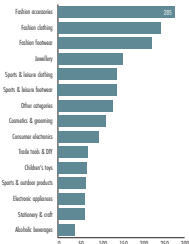
Source: RetailX

© ⓘ ⓘ RetailX 2022



What do the Top500 sell?

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

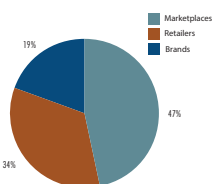


Categories that include at least 20 retailers are shown. Note that some retailers sell in multiple categories

Source: RetailX © ⓘ ⓘ RetailX 2022

The split of British web traffic

The percentage of visits from British consumers to the Top500's websites, divided into brands, marketplaces, and retailers



Marketplaces over-index relative to the other business types in the list, although many brands and retailers sell through marketplace websites as well

Source: RetailX © ⓘ ⓘ RetailX 2022

34%
Have iOS apps

50%
are brands

49%
are retailers

1%
are marketplaces

Congratulations to the RetailX UK Top500 Elite retailers of 2022: Amazon, Argos, Asda, Boots, Sainsbury's and Tesco

This year's report brings together insights from:

- 300 metrics, 500 companies and five years of analysis
- features practical examples from Top500 retailers including M&S, Blacks, Toolstation, River Island, Tesco, Halfords, Robert Dyas and many more

Download it at:
internetretailing.net/rxuk



41%

enable shoppers to save
their shopping basket



66%


of mobile websites enable
shoppers to zoom in on
product images, so they
can inspect the details



Global Elite 1000 Report 2022

The RetailX series of reports offers a global briefing on the ecommerce and multichannel landscape. The Global Elite 1000 Report measures retailers and brands that are leaders not just in their domestic market but have significant heft in multiple regions or have a global customer base.

Find out which companies have the farthest reach outside of their domestic market and how many retailers and brands rank in the Top15 in all ten regions. These are: Africa, Southeast Asia, Australasia, Europe, Latin America and the Caribbean, Middle East, North America, Northeast Asia, South Asia and Rest of the World.



Download the RetailX Global Elite 1000 Report 2022 at internetretailing.net

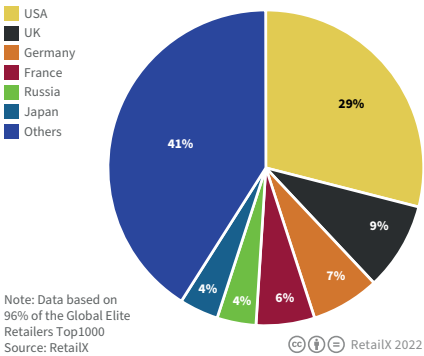
61.4%

of web traffic goes to companies based in the US

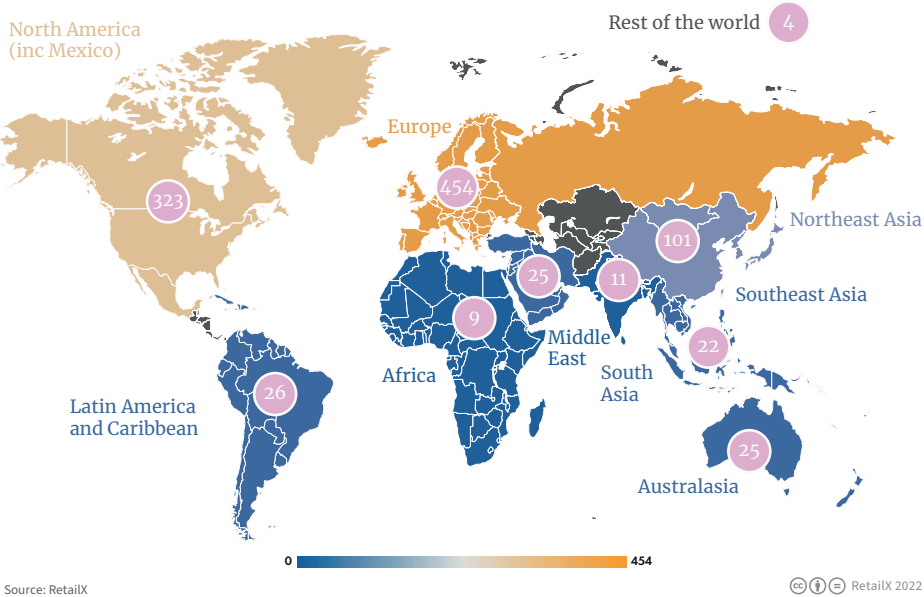
79%

of web traffic goes to multi-sector stores

Countries where the Global Elite 1000 are based

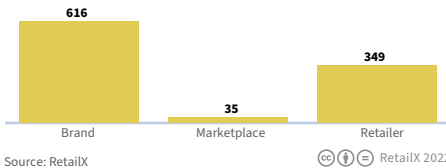


Where the Global Elite 1000 retailers and brands are based



Business types of the Global Elite 1000

The number of Top1000 retailers that are brands, which mostly sell own-label products; marketplaces, which host third-party sellers; and retailers



6

companies rank as Elite: Apple, Zara, Carrefour, DM, Leroy Merlin, Rewe

Amazon receives almost

4x

the web traffic from European consumers than any other retailer

RetailX in partnership with:
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EUROPE

RetailX Sustainability 2022

The RetailX Ecommerce Sector Report series offers a retail-focused overview of the state of commerce in a range of sectors, both globally and by country, blending data from ecommerce and trade associations with national and government data, our own research and other sources.

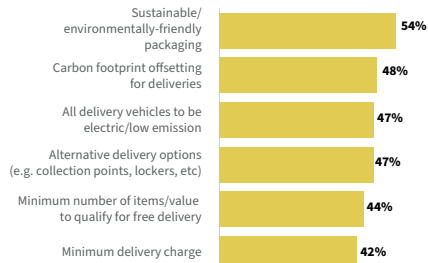
52%

of the RetailX Global Elite 250 include a sustainability section on their ecommerce site

10%

of the RetailX Global Elite 250 share their full sustainability plans with consumers

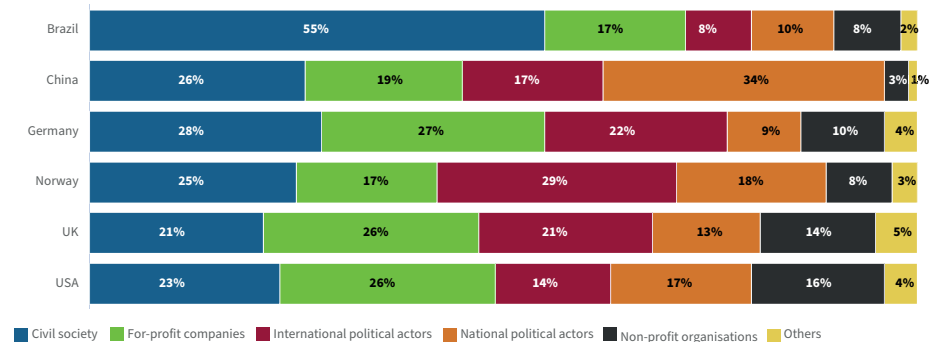
Sustainable delivery measures European consumers would like to see from large retail businesses



Note: Based on 10,669 European respondents, 7-18 January 2021. Source: UPS

CC BY ND RetailX 2022

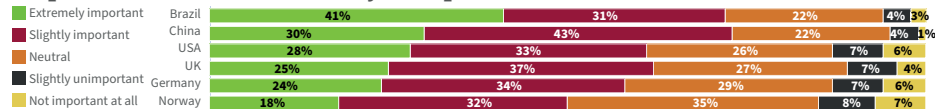
Actors for positive change, according to consumers



Source: Simon-Kucher & Partners, Global Sustainability Study 2021

CC BY ND RetailX 2022

Importance of sustainability as a purchase criterion



Source: Simon-Kucher & Partners, Global Sustainability Study 2021

CC BY ND RetailX 2022

56%

of consumers in the USA actively look for a brand's sustainability credentials

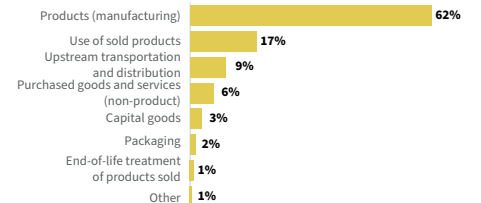
Discover how consumer concern about the environment continues to be a factor in their purchasing decisions and the extent to which the RetailX Global Elite 250 share their sustainability journeys with customers.



The current state and future direction of sustainability among the world's leading retailers and brands is investigated through features on organisational change, customer education, new business models, the legality of greenwashing, impact of the final mile, challenges of the B Corp process and the industry's progression towards circularity. Case studies highlight TFG London, Tesco, Carrefour and Cocoon.

Download the RetailX Sustainability 2022 report at <https://internetretailing.net/research/>

Breakdown of a fashion retailer's scope 3 emissions



Source: Zalando sustainability report 2021

CC BY ND RetailX 2022

60%

of consumers in Europe would pay more to avoid harm to the environment

RetailX in partnership with:



RetailX Sustainability 2022

The RetailX Ecommerce Sector Report series offers a retail-focused overview of the state of commerce in a range of sectors, both globally and by country, blending data from ecommerce and trade associations with national and government data, our own research and other sources.

Discover how consumer concern about the environment continues to be a factor in their purchasing decisions and the extent to which the RetailX Global Elite 250 share their sustainability journeys with customers. Differences and similarities between retailers, brands and marketplaces are highlighted along with analysis of behaviour in North America, Europe and Northeast Asia as well as the different retail sectors. Case studies highlight adidas, Apple, JD.com, Sony, Target and Zara.

Download the RetailX Sustainability 2022 report at <https://internetretailing.net/research/>



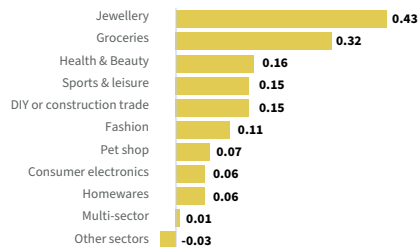
32%

of Global Elite 250 retailers include sustainability in the footer of their ecommerce site

54%

of brands in the Global Elite 250 include a sustainability section on their ecommerce site

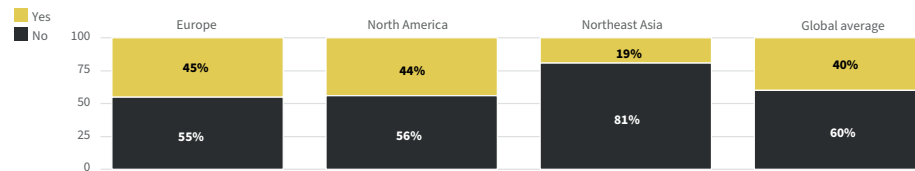
Average sustainability communications score for the Global Elite 250, by sector 2022



Note: Maximum score = 1. Metrics are positively and negatively weighted by importance. Source: RetailX

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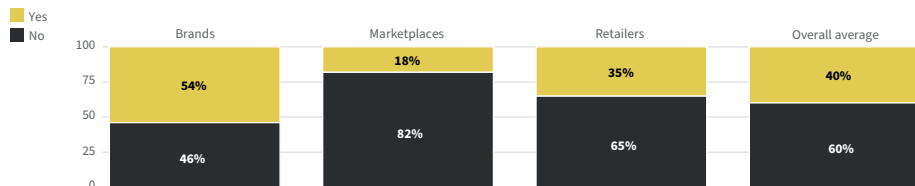
Presence of a sustainability section on the retailer's ecommerce site Selected regions, 2022



Note: Based on where the Global Top 250 retailers are headquartered; Global (250), Europe (127), North America (81), Northeast Asia (21)
Source: RetailX

CC BY ND RetailX 2022

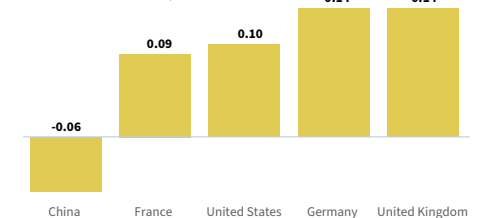
Presence of a sustainability section on the retailer's ecommerce site By business type, 2022



Note: Based on the business type of the Global Top 250; Brands (122), Marketplaces (62), Retailers (66)
Source: RetailX

CC BY ND RetailX 2022

Average sustainability communications score, by location of headquarters Selected countries, 2022



Note: Maximum score = 1. Metrics are positively and negatively weighted by importance. Source: RetailX

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73%

of consumers in China say sustainability is an important part of the purchasing decision

RetailX in partnership with:

INTERSOFT

METAPACK

P F S

Global Luxury Sector Ecommerce Report 2022

The RetailX Ecommerce Sector Report series offers a retail-focused overview of the state of commerce in a range of sectors, both globally and by country, blending data from ecommerce and trade associations with national and government data, our own research and other sources.

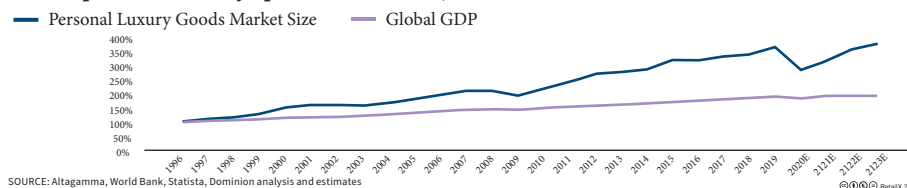
\$252bn

Value of the global luxury market in 2021, up 12% on 2020

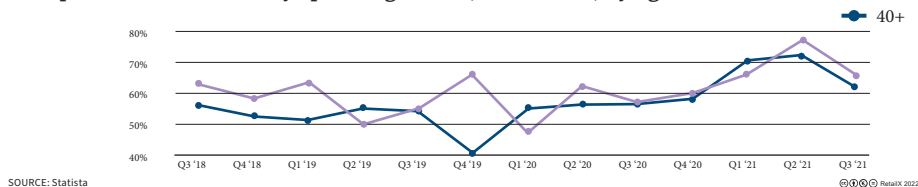
\$44bn

Worldwide revenue of the sector leader LVMH

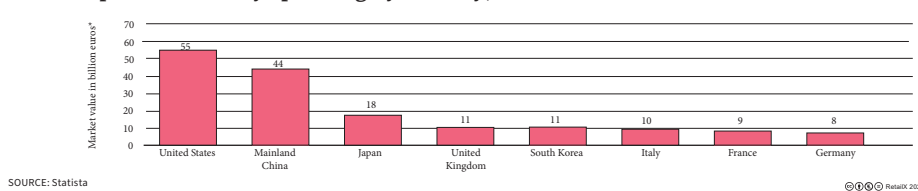
Global personal luxury spend versus GDP, 1996–2023(E)



European consumer luxury spending online, 2018–2021, by age



Value of personal luxury spending by country, 2020 (\$bn)



Global luxury sector revenues fell 12% in 2021 compared to 2020 with physical and travel retail locked down. Reopening is starting to drive recovery, putting the sector back to 2019 levels by 2023. Growth is also coming from younger shoppers who are turning to luxury brands for uniqueness and quality. This younger demographic is also driving luxury retailers to embrace digital and be more sustainable.

For more information and to download the full report go to: <https://internetretailing.net/retailx-sector-reports>

57%

Proportion of 18-39 year olds shopping luxury on mobile

37%

Increase in sustainability-related searches on luxury sites in 2020

40%

The proportion of luxury shoppers that defer purchases until they see an offer or promotion – this compares to the 15% who buy at full price



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Fashion Sector Ecommerce Report 2022

The RetailX Ecommerce Sector Report series offers a retail-focused overview of the state of commerce in a range of sectors, both globally and by country, blending data from ecommerce and trade associations with national and government data, our own research and other sources.

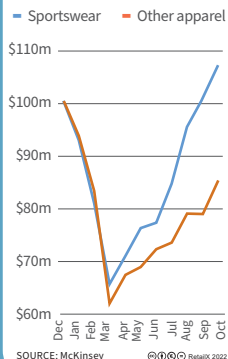
\$752bn

spent on fashion globally in 2020, growing around 9% pa to \$1tn by 2023

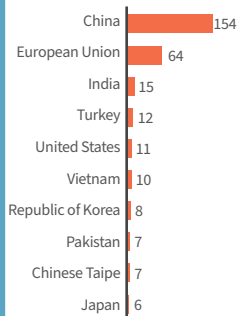
\$161bn

spent on fashion in Europe in 2020, forecast to grow 9% pa across three years

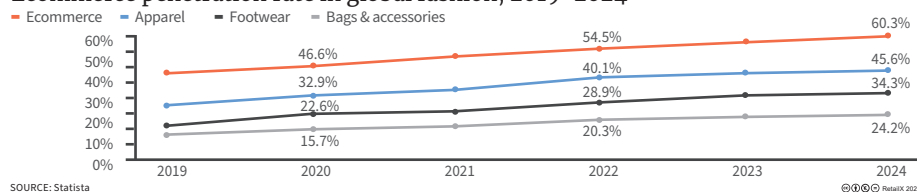
Sportswear versus other apparel company performance 2020



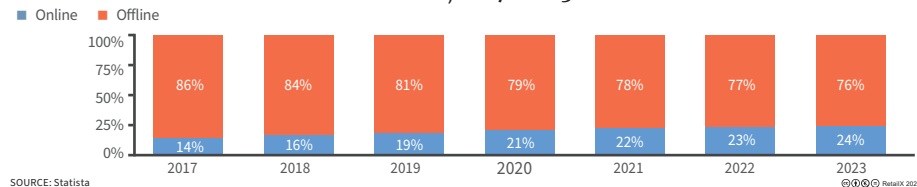
Leading exporters of apparel worldwide 2020 (\$bn)



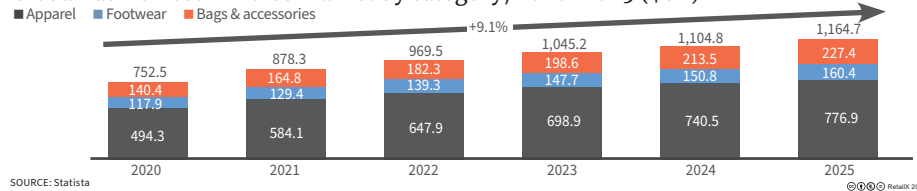
Ecommerce penetration rate in global fashion, 2019-2024



Global fashion online versus offline sales, 2017-2023



Global fashion ecommerce market by category, 2020-2025 (\$bn)



The EMEA fashion sector has been in a state of flux. For much of 2020, work and formal wear were less in demand, with consumers looking instead for athleisurewear. At the same time, the sector found itself having to rapidly embrace ecommerce. Come 2021, stores reopened and shopper habits shifted to a more complex digital-physical shopping journey – yet the sector has adapted rapidly and continues to grow. Download the full report: <https://internetretailing.net/retailx-sector-reports/emea-fashion-2022-ecommerce-sector-report>

46%

of 2021 EMEA fashion sales were online, globally it was 22%

55%

of global consumers use AR and/or VR during the purchase of clothing

56%

growth in African fashion ecommerce seen in 2020 generating \$4.2bn, compared to 29% in Europe and 32% in the Middle East



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cc i e RetailX 2022

Beauty & Cosmetics Report 2022

The RetailX series of Sector Analyst Reports offers a global briefing on the ecommerce and multichannel landscape within a certain area of retailing. The Global Beauty & Cosmetics Report 2022 is an online retail-focused overview using data from ecommerce and trade associations, national and government data, retailers, brands and our own research and insight.

65%

of consumers ordered beauty products online in 2021



Find out how macroeconomic factors are influencing the beauty & cosmetics market, the extent to which consumers have switched to online purchasing in recent years and the growth vectors for leading and niche retailers and brands. Discover how the online experience is changing in the US, China, Europe and the Middle East. Download the RetailX Beauty & Cosmetics Report 2022 at: <https://internetretailing.net/research/retailx-sector-reports/>

22.3%

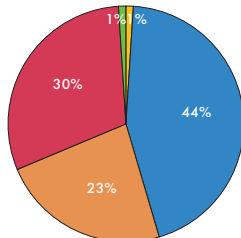
of skincare sales were made online in 2021

33.4%

of the Largest 100 brands and retailers, by web traffic, are headquartered in the US

REVENUE SHARE OF THE BEAUTY CARE SECTOR, BY REGION, 2021

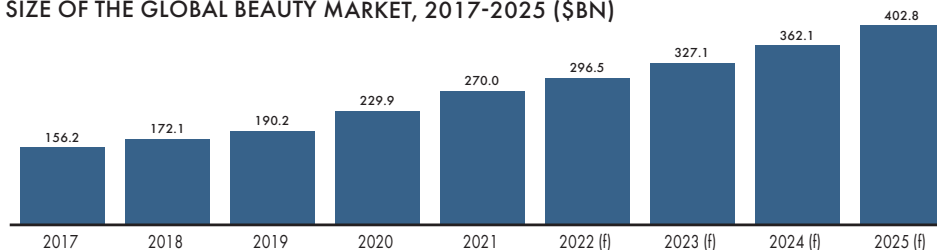
Africa
Asia
Europe
Americas
Australia & Oceania



Note: The ecommerce market sub-segment Beauty Care covers the online sale of natural and synthetic cosmetics and fragrances as well as beauty tools and accessories such as brushes and sponges. Data current as of December 2021. Source: Statista

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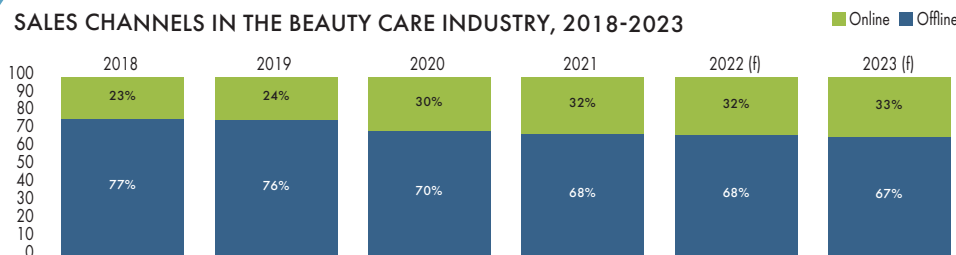
SIZE OF THE GLOBAL BEAUTY MARKET, 2017-2025 (\$BN)



Note: Beauty market includes the Beauty Care and Personal Care segments. All figures are estimates. (f) = forecast. Data current as of December 2021. Source: Statista

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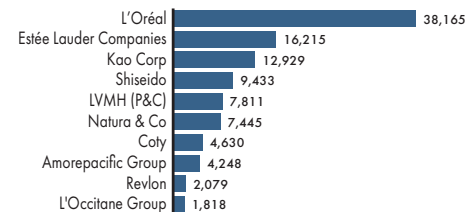
SALES CHANNELS IN THE BEAUTY CARE INDUSTRY, 2018-2023



Note: The ecommerce market sub-segment Beauty Care covers the online sale of natural and synthetic cosmetics and fragrances as well as beauty tools and accessories such as brushes and sponges. Data current as of December 2021. (f) = forecast. Source: Statista

CC BY NC ND RetailX 2022

KEY BEAUTY & COSMETICS CORPORATIONS, BY REVENUE, 2021 (\$M)



Source: Company financials, RetailX

CC BY NC ND RetailX 2022

RetailX in partnership with:



EMEA Digital Media Sector Report 2022

The RetailX Ecommerce Sector Report series offers a retail-focused overview of the state of commerce in a range of sectors, both globally and by country, blending data from ecommerce and trade associations with national and government data, our own research and other sources.

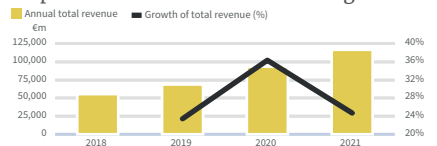
\$294bn

The value of the global digital media market

53%

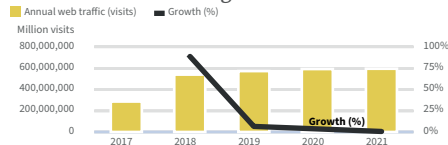
of digital media market is games

Average global revenue for the 5 most visited corporations in the EMEA Media Largest 100



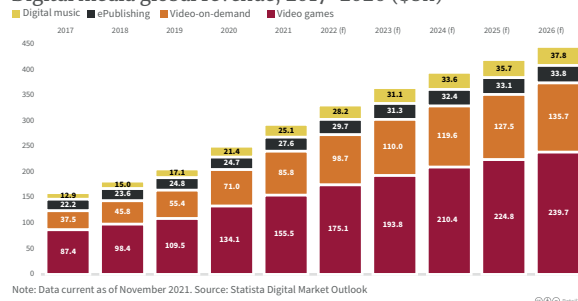
Note: Corporations reported include: Amazon.com Inc., Sea Group, eBay Inc., Alibaba Group Holding Ltd. and ContextLogic Inc. Source: RetailX, Yahoo Finance, Statista companyDB © RetailX 2022

EMEA derived web traffic to selected retailers in the EMEA Media Largest 100



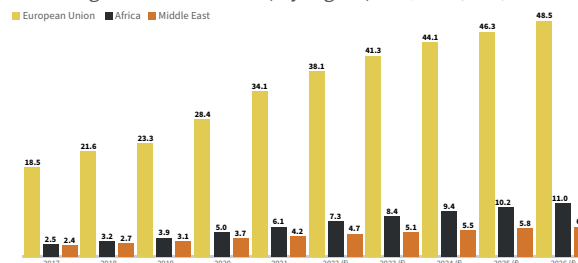
Note: Annual web traffic starts being recorded on the 1st of February of each year and runs until the start of the next recording period. Retailer selection contains: Alibaba.com, Amazon, Qoo10, Shopee, eBay, AliExpress and Wish. Source: RetailX, SimilarWeb © RetailX 2022

Digital media global revenue, 2017-2026 (\$bn)



Note: Data current as of November 2021. Source: Statista Digital Market Outlook © RetailX 2022

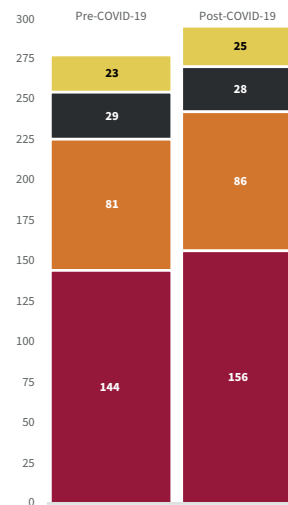
EMEA digital media revenue, by region, 2017-26 (\$bn)



Note: Data current as of December 2021. Source: Statista Digital Market Outlook © RetailX 2022

Covid-19's effect on global digital media revenue (\$bn)

Digital music ePublishing Video on demand Video games



Note: Digital Media forecast. Data current as of July 2021. Source: Statista Digital Market Outlook © RetailX 2022

The digital media sector, covering digital games, music, video and books has been growing steadily for a decade, but has exploded across the pandemic as consumers become digital-first. This has ushered in new streaming and subscription business models, as well as changing the very way media content is made –with much more UGC – distributed through multiple channels and consumed on a range of devices.



Download the full report: internetretailing.net/research/retailx-sector-reports/

75%
of music sales are digital

477m
people consumed esports in 2021, a figure likely to hit 577m by 2024

\$60bn
Value of streamed video market in 2020

73%
of consumers in EMEA have watched a live stream and 80% are willing to pay to watch

\$77bn
Spend on mobile games in 2021

Sponsored by
TEALUM

RetailX UK Beauty Ecommerce Report 2022

The RetailX Ecommerce Sector Report series offers a retail-focused overview of the state of commerce in a range of sectors, both globally and by country, blending data from ecommerce and trade associations with national and government data, our own research and other sources.

£150

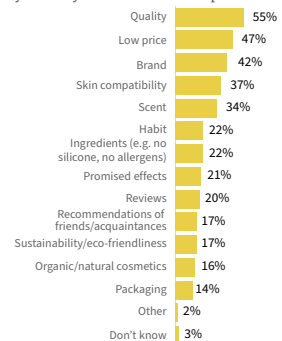
The annual spend by individuals in the UK on beauty and personal care items

£250

The forecast annual spend on beauty and personal care of consumers by 2026

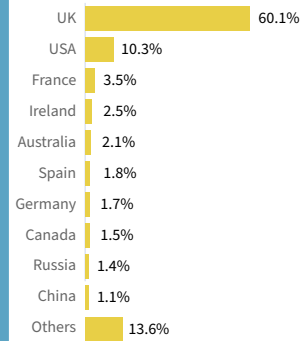
Purchase criteria for personal care in the UK, 2021

Based on which criteria do you usually select your body care and cosmetics products?



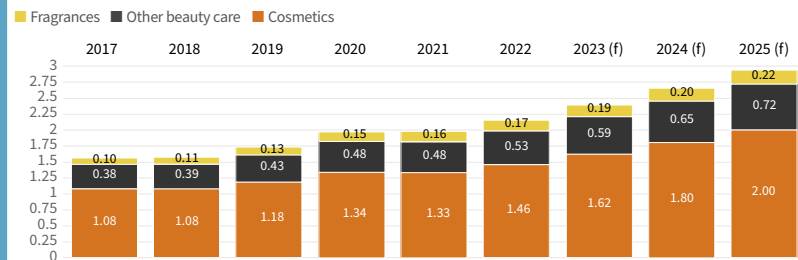
Source: Statista Global Consumer Survey
© RetailX 2022

Countries from which shoppers visit the UK-based beauty Largest 50 retailers



Source: RetailX, drawing on data from SimilarWeb
© RetailX 2022

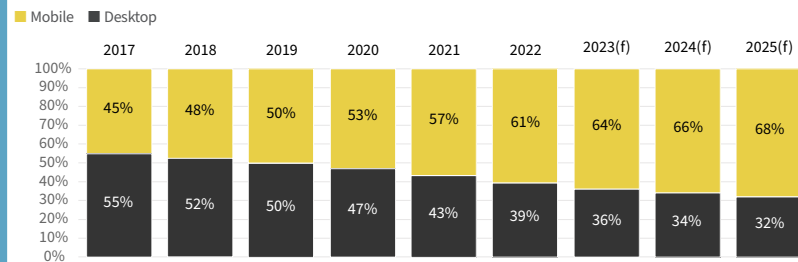
Revenue for the online beauty care market in the United Kingdom, 2017-2025 (£bn)



Source: Statista

RetailX 2022

Devices used for online shopping in the beauty care market in the UK, 2017-2025



Source: Statista

RetailX 2022

87.5%

of web traffic from UK consumers to retailers in this sector goes to British companies

10.3%

of their web traffic comes from consumers in the US

Find out how big the UK beauty sector is, what consumers want to buy and how much they spend. Plus, discover how and where consumers purchase beauty & cosmetics items and the criteria they use when making a purchasing decision.

The largest retailers are explored through web traffic from domestic customers as well as how they are placed in the wider global market. Company spotlights feature Boots, Estée Lauder, Lookfantastic, Mankind, Revolution Beauty and The Body Shop.

Download the RetailX UK Beauty Ecommerce Report 2022 at: retailx.net



46%

of beauty & cosmetics sales will be made online in 2022

68%

of online beauty & cosmetics sales will be via mobile in 2025



RETAILX

In partnership with



narvar

European Sports Goods Sector Report 2022

The RetailX Ecommerce Sector Report series offers a retail-focused overview of the state of commerce in a range of sectors, both globally and by country, blending data from ecommerce and trade associations with national and government data, our own research and other sources.

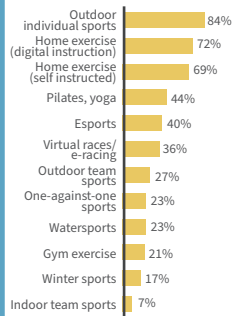
€12.04bn

The value of the European online sports goods market

89%

of online workouts are done by under 35s

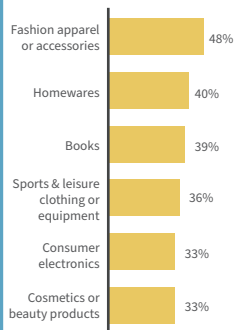
Expected increase in participation of selected sport disciplines, 2019 vs 2021



SOURCE: McKinsey and the world federation of the Sporting Goods Industry

Online shopping in Europe by category, 2021

What do you shop for online?



SOURCE: RetailX

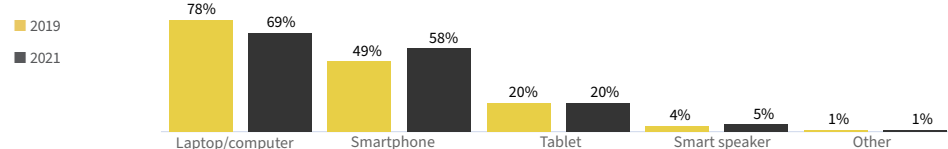
Preferred purchasing channels of sports goods by type of consumer, 2019 vs 2021



Source: Deloitte

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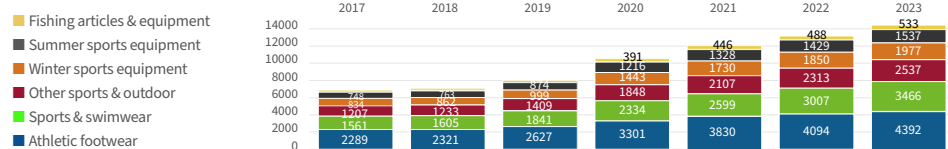
Devices used by online shoppers to purchase sports goods, 2019 vs 2021



Source: Deloitte

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Revenue of sports & outdoor ecommerce by category 2017-2023



Source: Statista

© RetailX 2022

The pandemic focussed attention on health and wellbeing and the European sports goods market has seen a boost as a result. Young people are driving this boom through individual exercise and the use of fitness apps. However, while ecommerce is growing, the market for performance sports goods is still dominated by offline sales, as users want to see and feel the items before they buy.

Download the full report: <https://internetretailing.net/retailx-sector-reports/emea-fashion-2022-ecommerce-sector-report>

5%

Of sports purchases made on sustainable grounds

84%

Growth in individual exercise 2019-2021

64%

Of consumers in Europe say they are prepared to pay a premium for sustainable sports goods



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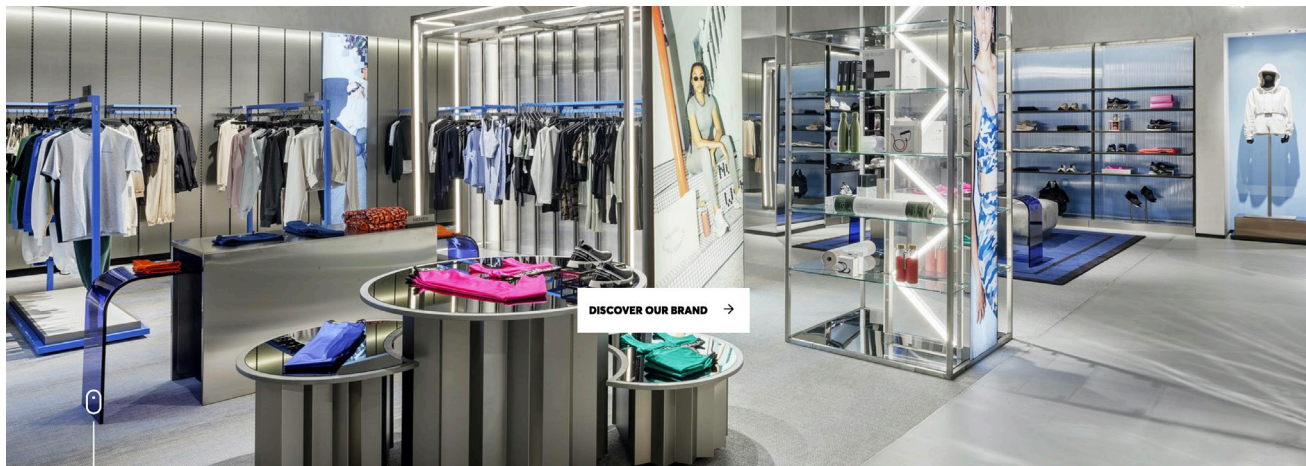
Looking forward to 2023

Retail is a fast-paced industry and while the pandemic and post-pandemic periods have forced change on the sector, it has evolved and embraced new habits

THINK GROWTH, THINK ENGAGEMENT

High inflation presents retailers with a worrying trade-off: do they go for short-term profits or continue looking for long-term growth, albeit with short-term pain? **For many online retailers, the game so far has been about rapid and massive customer acquisition.** With spending set to stall, retailers now have to look at how to pivot to driving those customers they currently have – the really loyal ones – to stick with them and then to carry on spending.

This means that **for many, investment in data and data analytics, along with rethinking marketing and engagement strategies will be a must.** Online retailers don't catch passing trade in the way that physical retailers do, so cutting marketing is not an option. Rethinking it, however, is. **Where will your customers find you?** Today, that's as likely to be on a TV streaming service as via Google shopping. With Netflix also toying with augmenting its



As well as investing in key stores, Frasers Group has also boosted profits by selling off real estate

flagging income through an ad-funded version, retailers could do well to consider alternative places for marketing.

Similarly, social media, which has long been a useful advertising and engagement channel for retailers, is going to look different in 2023. **While Instagram is still a strong performer for retailers, TikTok and, increasingly, BeReal are starting to steal the show,** especially for younger consumers coming of age. Should retailers flock to BeReal in 2023? The whole point of the site is authenticity, so if brands can push that side of themselves then perhaps yes, they should. After all, where 73.5mn active daily users flock to is a hard market to ignore, especially if your goal is to reach GenZ shoppers.

Using channels such as games and... whisper it... **the metaverse is also going to become the place for raising brand awareness among this growing cohort of younger consumers.** *Roblox* – an immersive collection of virtual worlds that can be designed into user-generated games – is metaverse 1.0 to all intents and purposes. It's already generating significant revenues from carrying brand adverts on in-game virtual billboards – around \$1bn annually. From a retailer's point of view, *Roblox* can not only be a good place to be seen, it can also give them bragging rights that they are already 'in the metaverse'.

HYBRID RETAIL AND ENGAGEMENT

The physical side of retail has already undergone massive transformation as ecommerce-addicted, locked-down shoppers have returned to the real world. **2023 will see a shaking down and consolidation of all the hybrid retail tropes that have been ushered in since Covid-19 hit.**

Linking how retailers interact with brands – as well as with each other – online with what they do in the real world will continue to reshape not only physical retail but also the very places where physical retail resides.

Town and city centres are being reborn, with stores having to reassess their role in a more complicated shopping journey. Already, big names have off-loaded expensive real estate as they slim down their physical operations. Frasers Group has boosted 2022 profits by selling off property, Selfridges is selling its iconic Oxford Street store to property developers and M&S accelerating its £1bn ten-year programme to rethink and revamp its store portfolio. **With many big name retailers such as Debenhams already gone from the high street, rents on commercial property have plummeted.** This is set to attract new developments and new names who will start to reuse these sites in new ways.

Technology is going to play a pivotal role in building these new stores, with **hybrid digital-physical offerings being better-suited to the consumer of 2023.** Christmas 2022

already saw the beginnings of retailers looking at inventive ways to make their stores more attractive to the digital native consumer. **JD Sports, for instance, teamed up with Snapchat to use augmented reality** to overlay a giant mechanical claw on its Oxford Street store window, bringing to life the retailer's TV and online advert. Similarly, The Yards in Covent Garden used geotagging to give visitors to the area prizes in the run-up to Christmas Eve.

These festive gimmicks belie a true shift towards bringing together not just physical and digital retail, but also bringing together digital engagement, social media and both online and offline retail.

A study by Sinch in late 2022 found that **73% of shoppers buy on their mobiles when a visit to a store is followed up by a text from the retailer.** Putting this into a global context, Mall of the Emirates, the mega mall in Dubai that caters to luxury tastes, now allows shoppers to buy more than 350 international and home-grown brands and luxury designers, entirely via WhatsApp, from the comfort of their homes – wherever they are in the world.

From enjoying a convenient and easy retail shopping experience, visitors can also use the mall's Digital Concierge service to get the perfect gift for loved ones. Furthermore, through a simple one-to-one WhatsApp conversation, shoppers can receive free delivery right at their doorstep within a matter of a few hours.



© Frasers Group

Popular both online and on the high street, Sports Direct is taking a truly omnichannel approach

Mall of the Emirates' Digital Concierge is just one of many digital retail experiences curated for shoppers alongside their traditional shopping experiences. The mall is leading the way in omnichannel, offering experiences accessible instore, at home, or on a mobile device. **A hybrid model that includes conversational commerce is bridging the gap between physical stores and digital platforms,** giving shoppers a simplified shopping journey.

This sort of curated, engaged retail model is going to dominate in the years ahead, shifting the meaning of multichannel to cover not only on and offline, but also the many channels and platforms where consumers engagement happens.

THE RISE OF RESALE AND PRELOVED

Tightening purse strings, along with a continued interest in sustainability and ethical retail, are driving a booming second-hand and resale market, which will have a growing impact on mainstream retail in the year ahead.

A study by OC&C Strategy Consultants in late 2022 found that there has been **a radical and rapid shift in consumer perception of second-hand items**, driving a £150bn global boom in buying and selling used products.

A separate study by Savoo looked at how sustainable brands are uncovered. It found that resale platforms such as Depop, Vestiaire Collective and even eBay are booming, with key brands such as Zara, Nike, Adidas and H&M being the most sought-after brands for resale. It also noted that **such big brands are themselves increasingly encouraging the return of used items for resale**.

Consumers have so far driven this rise in fashion resale, with many sites and marketplaces popping up to link buyers and sellers. However, the brands are now starting to take note and are doing it themselves. H&M has run



H&M's RE:WEAR platform allows shoppers to buy and sell second-hand styles from any brand

its H&M Rewear programme since 2021, where shoppers can buy and sell any fashion brands on the site. **While programmes like this tick the sustainability box they also make business sense.** As those purse strings tighten, shoppers will spend less. Looking for bargains, they will be drawn to preloved goods. This creates a new revenue stream for retailers, while barely increasing costs. This represents a win-win for retail.

To date, fashion has been the leader in this regard, although consumer electronics and gadget stores such as musicMagpie have also seen success in resale of items.

Soon, the resale model could be seen across many more retail verticals.

Such a move could well stick past the economic turbulence we see today. Shoppers getting into the habit of reuse shifts us all away from our reliance on fast consumerism, something that perhaps has been a long time coming.

Conclusion

We hope that you have found our research and analysis to be of interest and commercial value. We would be very pleased to hear from you with questions, suggestions or comments, and in particular we would like to hear about any areas you think we should include in the 2023 report.

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