

MULTICHANNEL RETAIL REPORT

2019 UK Edition

Report analysing multichannel retailers in the UK, based on the core tenets of multichannel retailing.

AMPERSAND

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Foreword

Our Retail Reports are back. We didn't manage to release any in 2018, and we could blame it on Brexit or losing in the semi-finals of the World Cup. But they're back and bigger than ever, with 24 new retailers and new criteria to analyse!

2018 was a turbulent year for retail, with big names such as Toys 'R' Us and Maplin closing their doors. A challenging retail environment has shaken very many others. So this year's findings, following our brief hiatus pose an interesting question. Are the usual suspects still the best-performers? Or, are we seeing newcomers steal a charge? Are they winning the fight thanks to a lack of financial encumbrance and more organisational agility?

The criteria in our multichannel report focuses on two areas; convenience and customer experience. The real

winners in this year's report have integrated the digital and the physical. They have invested in convenient delivery, speedy click and collect and easy returns.

For retailers locked-in to legacy, monolithic platforms these are the hardest to tackle. These retailers must redouble their efforts. Their survival depends on them matching the accelerating pace of change. They must focus on a strategic approach to technology. Without this, they will never meet the growing demands of tomorrow's shopper.



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The criteria

We have defined a **multichannel retailer** as one that sells online and in at least one physical store.

For this report, we've surveyed 200 retailers. We've kept the majority of retailers from our previous 2017 Multichannel Retail Report, removing those that are no longer multichannel or those that are no longer in business, and increasing our list of retailers to improve the accuracy and relevance of our results.

To create our list of retailers, we sourced IMRG, Sitemorse, the retail trade media and the high street to select 200

leading retailers. The retailers have been split into nine sectors; Department, Fashion, Home & DIY, Sports & Outdoors, Health & Beauty, Electrical & Tech, Children & Toys, Food & Drink, and Arts, Crafts & Books. We have provided a benchmarking score, the **Ampersand Retail Matrix**, for each of these sectors so that we can easily determine which retailers are above average for their sector, and which are not up to best practice.

The Ampersand Retail Matrix score for each retailer is based on the core tenets of multichannel retailing online; mobile performance, positive UX, multichannel technologies, click and collect, delivery, returns, and payment. The result? A truly unique insight into high street retailers selling online in the UK.

Retailers

& Other Stories	Bonmarché	Crew Clothing	Ernest Jones	GO Outdoors	Hornby
Accessorize	Boots	Currys PC World	Evans Cycles	Gucci	Hotel Chocolat
Adidas	Build-A-Bear	Debenhams	F.Hinds	H&M	House of Fraser
American Golf	Burberry	Deichmann	Farfetch	H.Samuel	Hughes
Ann Summers	Burton	Demon Tweeks	FatFace	Habitat	Hugo Boss
Anya Hindmarch	Cath Kidston	Diesel	Field & Trek	Halfords	IKEA
Apple	Chain Reaction Cycles	Dior	Flannels	Hamleys	Interflora
Aquascutum	Charles Clinkard	Disney Store	Footasylum	Harrods	Jack Wills
Argos	Clarks	Dolce & Gabbana	Foot Locker	Harvey Nichols	Jaeger
Armani	Clas Ohlson	Dorothy Perkins	Fortnum & Mason	Harveys Furniture	JD Sports
ASICS	Clintons	Dr. Martens	Foyles	Hawkin's Bazaar	Jessops
B&Q	Coast	Dreams	Fred Perry	Hobbs	Jigsaw
Barbour	COS	Drome	French Connection	Hobbycraft	Jimmy Choo
Bathstore	Cotswold Outdoor	Dunelm	Furniture Village	Holland & Barrett	John Lewis & Partners
Bensons for Beds	Cotton Traders	Dune London	GAME	Hollister Co.	Karen Millen
Better Bathrooms	Crabtree & Evelyn	Dunnes Stores	GAP	Home Bargains	Kurt Geiger
Blacks	Craghoppers	Early Learning Centre	George	Homebase	Laithwaite's

Retailers

Lakeland	Miu Miu	Paperchase	Scribbler	The Body Shop	Uber Kids
Laura Ashley	Moda in Pelle	Paul Smith	Selfridges	The Entertainer	United Colours of
LEGO	Molton Brown	Peacocks	Shoe Zone	The Fragrance Shop	Benetton
Levi's	Monsoon	Pets at Home	Size?	The North Face	Urban Outfitters
Liberty London	Moss Bros	Pull&Bear	Smiggle	The Pen Shop	Victoria's Secret
Links of London	Mothercare	QD	Smyths	The Perfume Shop	Warehouse
Lush	Mountain Warehouse	Quiz	Smythson	The Range	Waterstones
M&Co	Mulberry	Reebok	Snow+Rock	The Whiskey Shop	Whistles
Majestic Wine	Nespresso	Reiss	Space NK	The White Company	White Stuff
Mamas & Papas	New Look	Richer Sounds	Specsavers	The Works	Whittard of Chelsea
MANGO	Next	River Island	Speedo	Thomas Pink	WHSmith
Marc Jacobs	Nike	Robert Dyas	Sports Direct	Thorntons	Wickes
Marks & Spencer	Oak Furnitureland	Rohan	Sunglass Hut	TJ Hughes	Wilko
Matalan	Oasis	Russell & Bromley	Superdrug	TK Maxx	ZARA
Menkind	Oddbins	Ryman	Superdry	Topshop	
Mint Velvet	Office	Schuh	Ted Baker	Tu	
Missguided	Oliver Bonas	Screwfix	Tessuti	Tweeks Cycles	

Benchmarking

Comparing Ampersand Retail Matrix scores by sector

Our median scores have increased across the board, with the average median score across all sectors increasing by 6 points. The **Fashion** median score has increased by 5 points, the **Department** media score by 4 points, and our **Electrical & Tech** median score has increased by a significant 16 points! All of the remaining sectors are new to our multichannel benchmarking.



All

60



Fashion

61



Department

66



Home & DIY

60



Sport & Outdoors

63



Health & Beauty

59



Electrical & Tech

66



Children & Toys

56



Food & Drink

54



Arts, Crafts & Books

55

Click and collect

The biggest shift we've seen in multichannel this year has been in click and collect. More retailers can now offer this service (and can offer it quicker than ever before), albeit at an increased cost for customers.

More retailers can now offer fast in-store click and collect, with **33%** of retailers able to offer click and collect next day or sooner, with 33 out of our 200 retailers even able to offer this service same day. It seems that most of our retailers are now able to tap into their inventory management systems in order to accurately manage their stock and guarantee a speedy click and collect service.

The majority of retailers are now offering in-store click and collect for free, most likely using their existing delivery network to reduce costs, with **79%** of retailers always offering free click and collect without the need for a minimum spend. We have also seen an increase in the cost for click and collect amongst

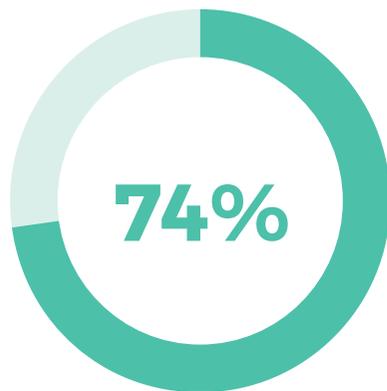
those who do charge, with the average cost at **£2.78** (an increase from £2.38). Hollister Co. charged the most for click and collect at £5, whilst Holland & Barrett charged the least at £0.95.

Not only are retailers improving their in-store click and collect service, we are also seeing an increase in retailers offering click and collect in non-store locations (such as a locker, convenience store, or petrol station), utilising services provided by Collect+, myHermes, Doodle, and HubBox. **32%** of retailers now offer this service, a rise from 24% in 2017, and we expect this to continue to increase throughout 2019.

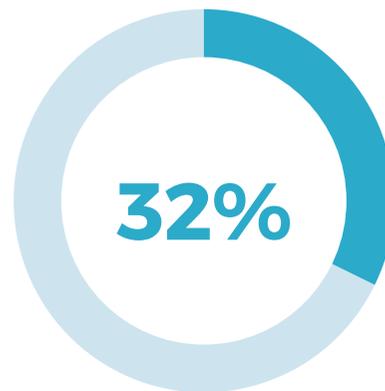
The best performing retailers in the click and collect facet of our research were Apple, B&Q, Cotswold Outdoor, Mamas & Papas, Next, Schuh and Snow+Rock. These retailers offered a range of options for customers and balanced cost, speed and location to offer a fantastic click and collect service.

Click and collect

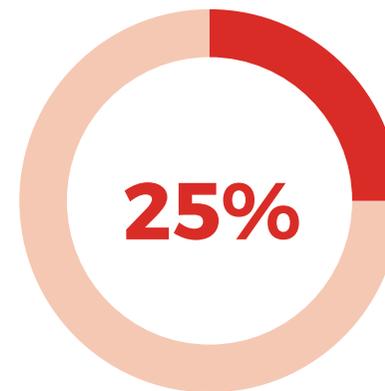
Percentage of retailers who offer click and collect



To store locations



To non-store locations



To store and non-store locations

Percentage base of **200** retailers

Retailers **who charge** for click and collect, but offer it **free** after a minimum spend:

Blacks	Missguided
Cotton Traders	Mountain Warehouse
Debenhams	Nike
Dune London	Oasis
H&M	Oliver Bonas
Habitat	Paperchase
Hawkin's Bazaar	Peacocks
Holland & Barrett	The Fragrance Shop
JD Sports	TK Maxx
John Lewis & Partners	

Retailers **who always charge** for click and collect, regardless of basket value:

Field & Trek
Hollister Co.
House of Fraser
Levi's
Sports Direct
Tessuti
The Range
TJ Hughes

OF THE
RETAILERS
WHO CHARGE
FOR **CLICK**
AND COLLECT,
THE AVERAGE
COST IS **£2.78**

Delivery

Delivery costs and timings have all seen significant changes this year too. More retailers are offering free delivery and the cost for standard delivery has generally decreased. However, we've seen the cost of priority delivery options rise, as customers expect faster delivery online.

The average cost for standard delivery across those who charge is **£4.26**, a 38% decrease from £6.87 in 2017. Are we seeing a shift in more affordable standard delivery options for retailers? Or are retailers encouraging customers to spend more with priority delivery options?

Priority delivery options have seen a rise in cost, with same day delivery seeing the largest increase. The average cost for same day delivery is **£11.07**, a 46% increase from 2017, whilst

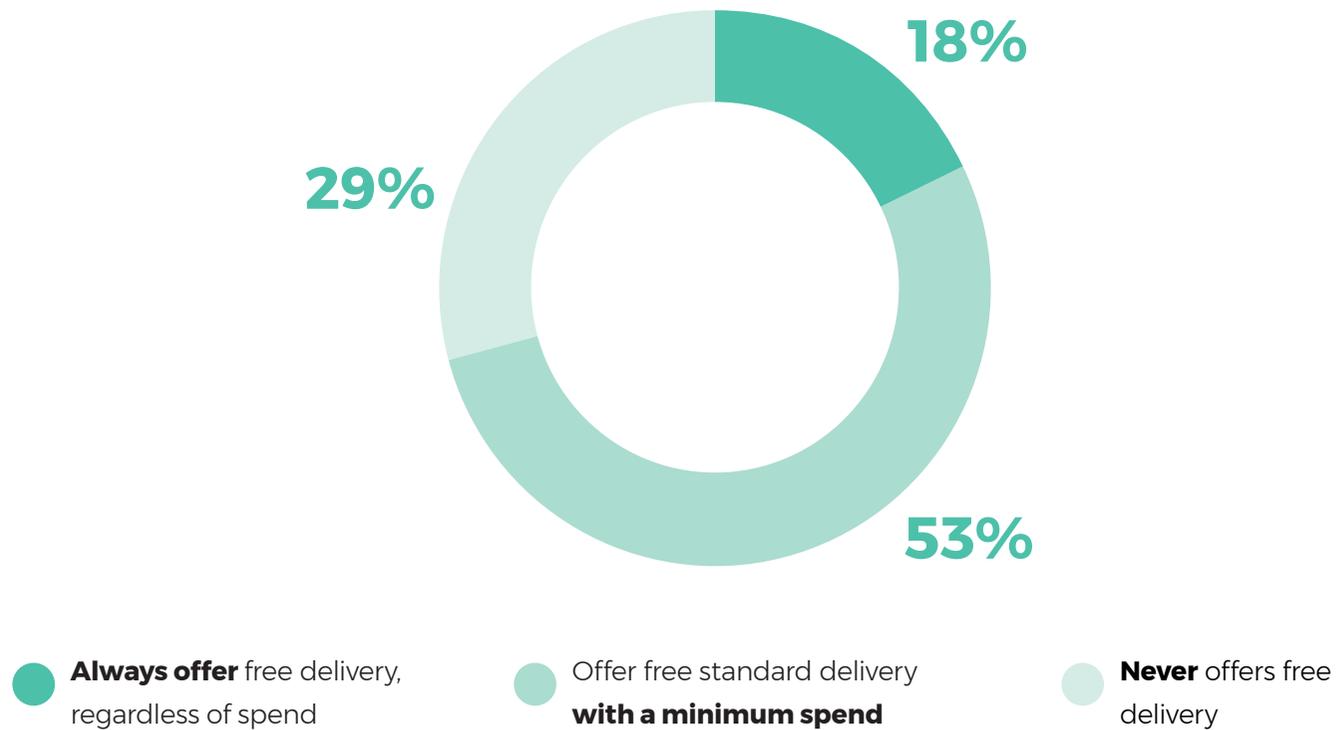
the cost for next day delivery is at **£6.08** (4% increase), and the cost for evening delivery is **£8.15** (16% increase).

More retailers are offering free delivery, with **71%** of retailers now offering free delivery either as standard, or after a minimum spend. However, this minimum spend for free delivery has seen an increase to £56.02. **18%** of retailers do offer free standard delivery with no minimum spend, an increase from 13% in our previous report, including retailers such as Superdry, Currys PC World, Whistles, Links of London, Hugo Boss and more.

The best performing retailer in the delivery space was Interflora (unsurprising, considering the need to deliver their produce quickly!), followed by Currys PC World and Wickes.

Free delivery

Retailers offering free standard delivery



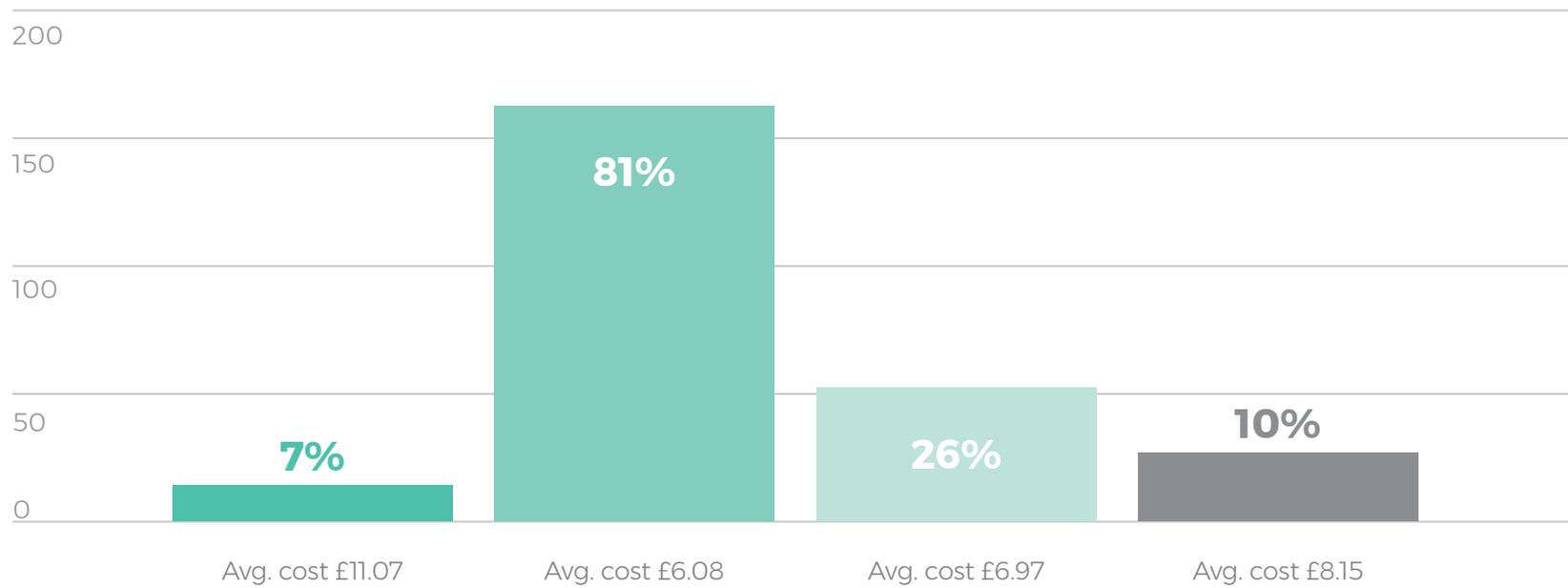
Retailers who **always** offer free delivery, **regardless of spend**:

Adidas	Majestic Wine
Anya Hindmarch	Marc Jacobs
Apple	Mint Velvet
ASICS	Miu Miu
Bensons for Beds	Oak Furnitureland
Better Bathrooms	Office
Burberry	Richer Sounds
Charles Clinkard	Shoe Zone
Currys PC World	Smythson
Diesel	Specsavers
Dior	Speedo
Foyles	Sunglass Hut
Fred Perry	Superdry
GAME	Ted Baker
Gucci	The North Face
Hugo Boss	The Perfume Shop
Jimmy Choo	Whistles
Links of London	

**THE AVERAGE
COST OF
STANDARD
DELIVERY IS
£4.26, A 38%
DECREASE
FROM £6.87
IN 2017**

Delivery

● Same day delivery ● Next day delivery ● Named day delivery ● Evening delivery



Retailers offering various delivery times and options

Returns

Offering free returns is an opportunity for retailers to differentiate themselves from others in the market. However, we are seeing more retailers now offering variety in the method of returns for their customers, with brands such as myHermes and Collect+ allowing retailers to offer collection and easier postal returns alongside traditional in-store returns.

For this facet of research, we focused on giving retailers scoring points for free returns without any stated conditions. For example, retailers were not given a scoring point if they only offered free returns on faulty products and charged for returns otherwise.

Not surprisingly, the majority of retailers clearly state that they offer free returns to stores, with over **3 out of 4 retailers** offering this service.

Although most stores offer free in-store returns, we have seen a decrease in retailers offering free returns by post, with **52%**

of retailers allowing their customers to return their order by post for free, either with a pre-paid label or refunds (a slight decrease from 57% in 2017).

Returns by collection is where we have seen the most interesting shift, with **36 out of 200 retailers** offering free returns by collection from your home. Many retailers encourage customers to visit their store to return their orders in an attempt to increase spend whilst in-store. However, it's clear that the winners of multichannel focus on the customer and offer free returns by collection from the customer's home, instead of focusing on in-store returns. This is one key element of a great returns experience.

The retailers offering the best returns experience for customers, by offering free returns in-store, by post and by collection, alongside having a clear and easy to find returns policy, include Argos, Oasis, Holland & Barrett, Selfridges, Lakeland, River Island, Diesel, and Harvey Nichols.

Returns

Percentage of retailers who offer free returns



Free returns to **stores**



Free returns by **post**



Free returns by **collection**

Percentage base of **200** retailers

Multichannel UX

Whilst we're seeing many interesting trends offline for multichannel (across click and collect, delivery, and returns), we are also seeing positive improvements online - with more retailers embracing multichannel UX technologies.

The first trend we've seen with multichannel UX has been an increase in retailers using geolocation features online. The biggest increase we've seen is the number of retailers implementing geolocation technologies on desktop for store locators and stock check. **Over half of retailers' sites** now take advantage of desktop geolocation to improve their online experience, whereas in 2017 we only saw 40% of retailers embracing this.

Naturally, mobile geolocation has been utilised by retailers more often than desktop geolocation, so it's not a surprise that we have seen a continued increase in the number

of retailers adopting this technology on mobile. **62%** of retailers use mobile geolocation features on their stock check or store locators, an increase from 57% in 2017, including Peacocks, Shoe Zone and Moss Bros.

The second trend we've seen has been the increase in stock check functionality online. **35%** of retailers now offer this online, an increase from 27% in 2017. It's also interesting to see that 19 out of the top 20 performing multichannel retailers have stock check (with only Superdry not embracing stock check online).

To implement a stock check feature online, retailers will need to invest in their warehouse management systems, inventory management systems, and/or PIM and integrate them well with their ecommerce platform.

In-store stock check online

Retailers who offer in-store stock check online

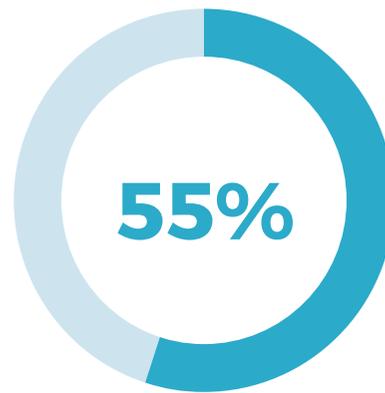


Geolocation

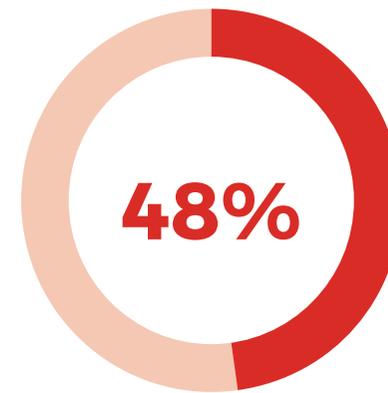
Retailers who offer geolocation features on mobile, desktop and both



Mobile



Desktop



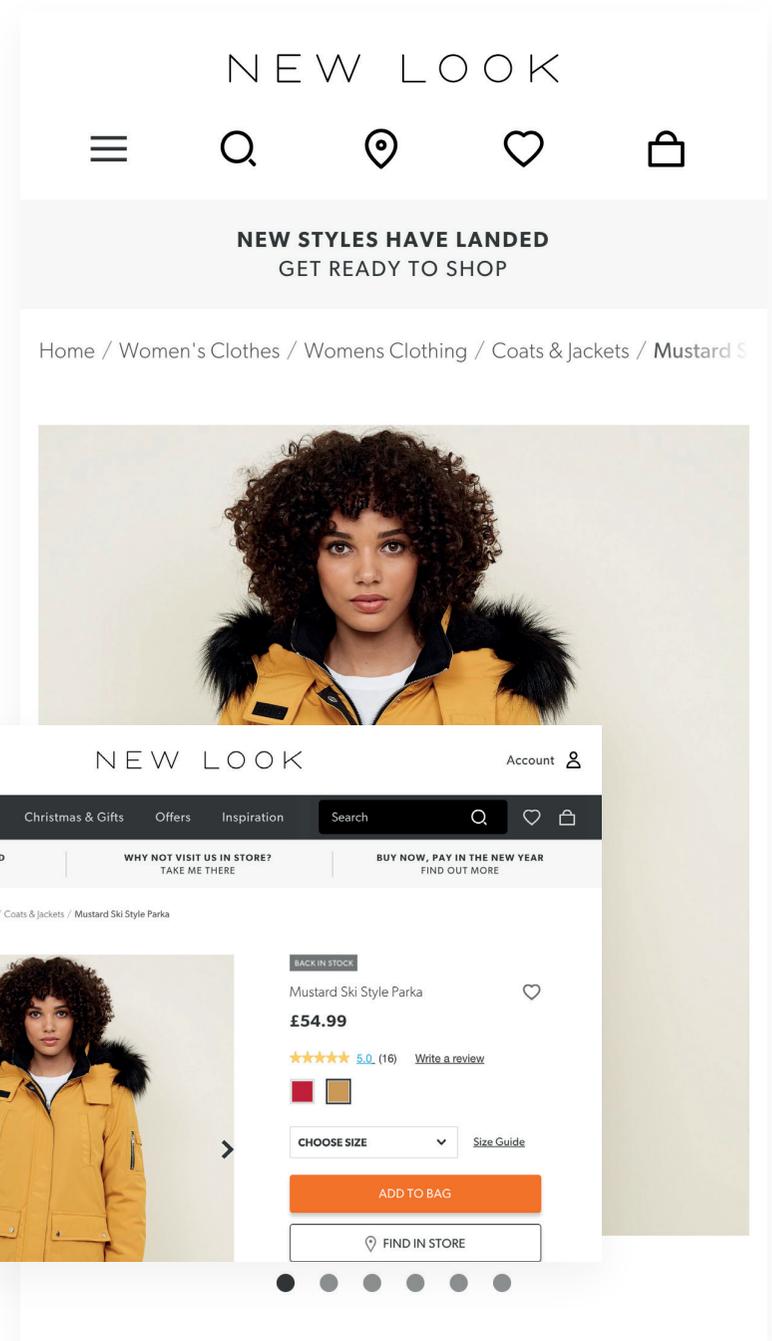
Both

Percentage base of **200** retailers

TOP MULTICHANNEL RETAILER

New Look 89/100 +20

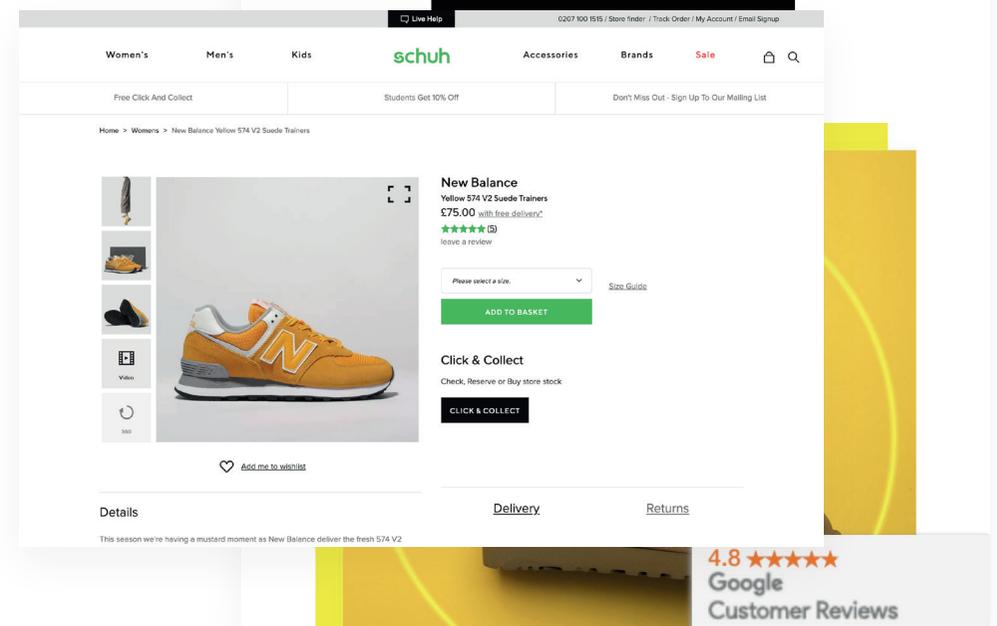
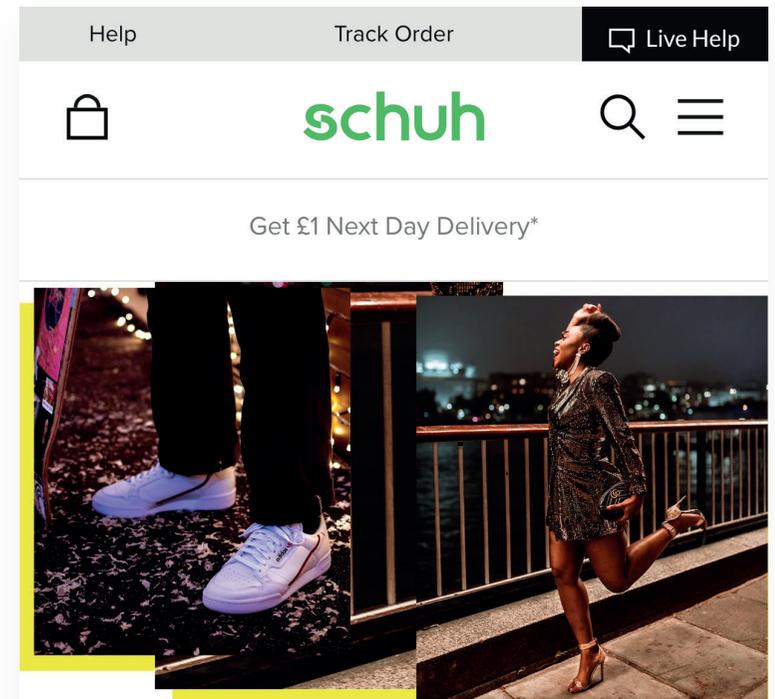
New Look is new to our list of top multichannel retailers, and has skyrocketed to number one with an **extra 20 points** this year. The retailer has truly embraced multichannel with a wide range of delivery options, a seamless mobile experience, and a simple and straightforward navigation and browsing process. Congratulations to the New Look team for excelling at multichannel!

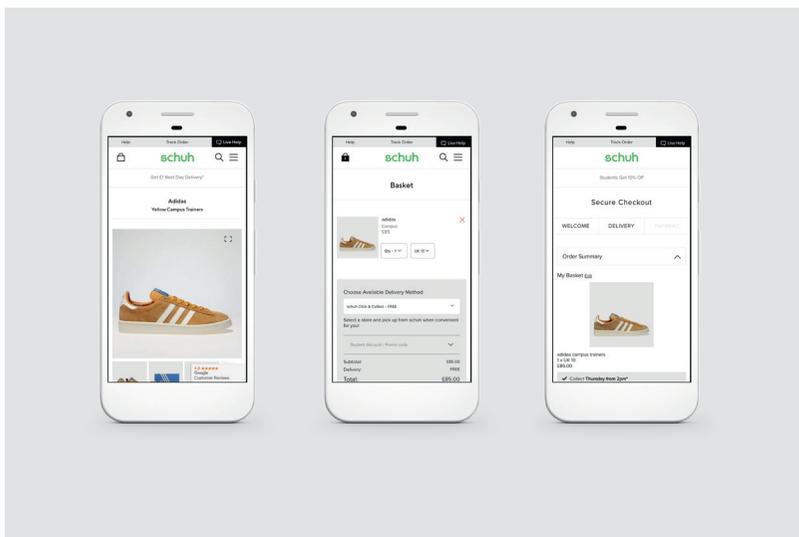


TOP MULTICHANNEL RETAILER

Schuh 89/100 +2

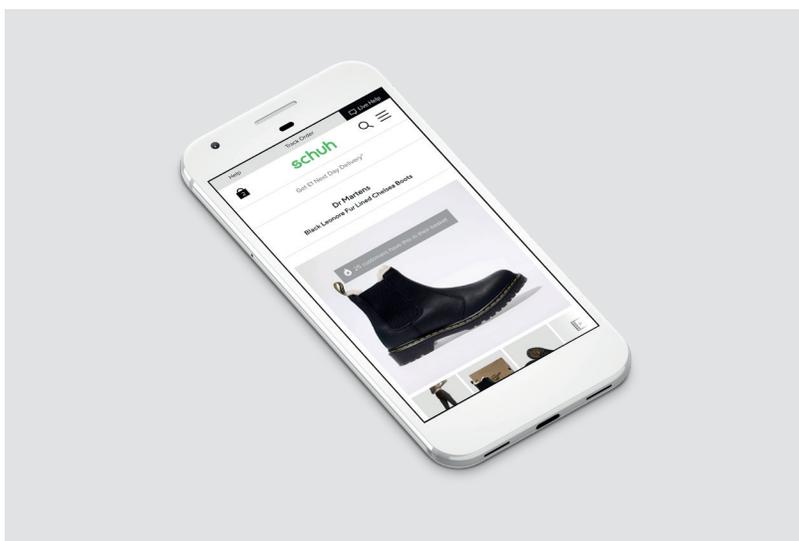
Schuh has been featured in our top multichannel retailers before, having scored highly in our 2017 report. They are regularly seen as a champion of ecommerce and retail within the industry, and always at the forefront with delivery and multichannel. This year, Schuh is joint first with a high **89/100** score. Congratulations to the team for reaching the top spot this year!





Excelling at multichannel

Schuh gained the most scoring points from offering a wide range of delivery options - including fast 1-hour click and collect, next day, and nominated day delivery. They also excelled at multichannel UX by embracing stock check functionality, geolocation and clear store opening hours.



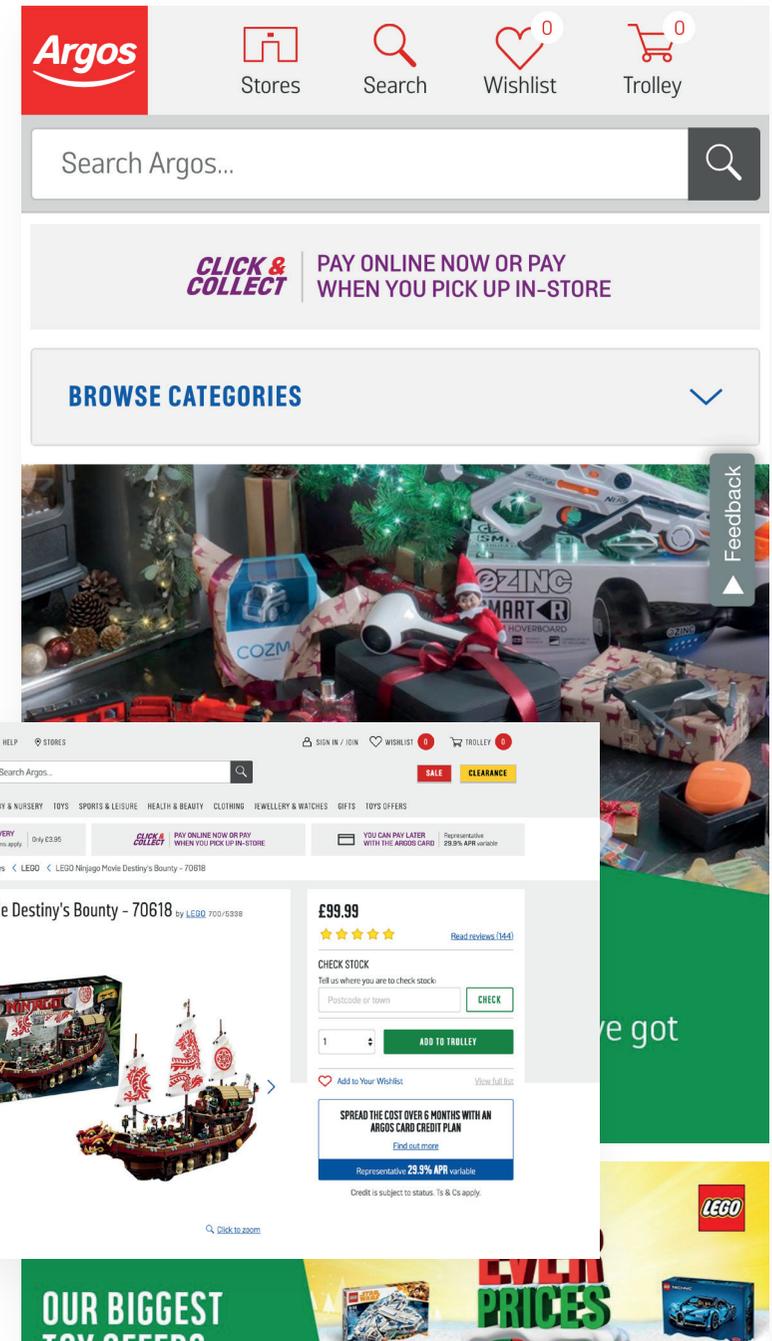
Extra points

Schuh has gained additional points this year by improving their site speed across desktop and mobile, and by embracing geolocation technologies on desktop to improve their multichannel experience. This increased their final score to take the top spot!

TOP MULTICHANNEL RETAILER

Argos 87/100 +3

Argos is another regular leader in our reports, having gained a few additional points from an increased desktop site speed, clearly displayed payment options and geolocation features on desktop. It's clear that Argos excel at multichannel from their delivery and collection options ranging from same day delivery through to immediate click and collect. Great work from the Argos team yet again!



What do the top performers have in common?



Fast click
and collect
to store



Next day
delivery



In-store
stock
check



Persistent
cart



Geolocation
features



Guest
checkout



Faceted
navigation



Product
zoom

Top multichannel retailers

The Wickes logo consists of the word "Wickes" in white, bold, sans-serif font, centered within a blue, downward-pointing chevron shape.

86/100 +17

Excelled at: 1-hour click and collect; same day delivery; clear website navigation including category breadcrumbs and faceted navigation; strong mobile performance with easy keyboards; positive multichannel UX with stock check functionality; guest checkout and persistent cart functionality.

Lost points for: no mobile-specific payment options; no wishlisting; limited click and collect options; no free returns by post.

The OASIS logo features the word "OASIS" in a pink, serif font, centered on a white background.

86/100 +12

Excelled at: offering mobile-specific payment options; faceted navigation; positive multichannel UX with stock check functionality and clear opening hours; guest checkout and persistent cart functionality; same day click and collect; free returns by post and home collection.

Lost points for: no clear payment options before the cart; no same day delivery; limited click and collect options.

The B&Q logo consists of the letters "B&Q" in white, bold, sans-serif font, centered within an orange square.

83/100 +2

Excelled at: range of click and collection options with 1-hour in-store click and collect; next day and nominated day delivery; intuitive product zoom and geolocation; positive multichannel UX with stock check functionality and clear opening hours; guest checkout and persistent cart functionality.

Lost points for: no mobile-specific payment options; no wishlisting; no clear payment options before the cart; no free returns by post.

The EVANS CYCLES logo features the words "EVANS" and "CYCLES" in yellow, bold, sans-serif font, stacked vertically and centered within a dark green rectangle.

81/100 +2

Excelled at: same day click and collect; next day delivery; geolocation features on mobile and desktop; intuitive product zoom on mobile; positive multichannel UX with stock check functionality and clear opening hours; guest checkout and persistent cart functionality.

Lost points for: no mobile-specific payment options; no easy wishlisting without an account; limited click and collect options; no free returns by post.

Bottom multichannel retailers



39/100 -6

Lost points for: no click and collect; limited delivery options; no free returns; low desktop and mobile site speeds; no mobile-specific payment options; no stock check functionality; no easy wishlisting without an account.

Gained points for: mobile and desktop geolocation; easy mobile keyboards; intuitive product zoom on mobile, faceted navigation; clearly displayed store opening hours; guest checkout; persistent cart.



37/100 +5

Lost points for: no click and collect; limited delivery options; no free returns; low desktop site speed; no faceted navigation; no mobile-specific payment information; no stock check functionality; no clear payment options before the cart; no guest checkout; no persistent cart.

Gained points for: named day delivery; mobile and desktop geolocation; easy mobile keyboards; intuitive product zoom on mobile; clearly displayed store opening hours.



30/100 -3

Lost points for: no click and collect; no free returns; low desktop and mobile site speeds; no mobile-specific payment options; no stock check functionality; no easy wishlisting without an account; no guest checkout; no persistent cart.

Gained points for: next day delivery; mobile and desktop geolocation; easy mobile keyboards; category breadcrumbs; faceted navigation; clearly displayed payment options before the cart.



30/100 -0

Lost points for: low desktop and mobile site speeds; no mobile or desktop geolocation; no faceted navigation; no stock check functionality; no easy wishlisting; no persistent cart; limited click and collect options.

Gained points for: guest checkout; free returns by post; easy-to-find delivery and returns policy; next day in-store click and collect; next day delivery; easy mobile keyboards; clear store opening hours.

Full rankings

RETAILER	SCORE	IMP (+/-)	RETAILER	SCORE	IMP (+/-)	RETAILER	SCORE	IMP (+/-)
New Look	89	20	Next	75	19	Hugo Boss	71	29
Schuh	89	2	Currys PC World	75	2	Hughes	70	25
Argos	87	3	Paperchase	75	12	Matalan	70	8
Oasis	86	12	French Connection	74	21	Blacks	70	2
Wickes	86	17	Dorothy Perkins	74	NEW	Footasylum	70	5
B&Q	83	2	Whistles	74	21	Smyths	70	14
Evans Cycles	81	2	Holland & Barrett	74	6	Burton	70	NEW
FatFace	79	26	Links of London	74	24	ZARA	70	11
GO Outdoors	78	7	Office	73	14	John Lewis & Partners	70	1
Screwfix	78	-2	Halfords	73	7	Hotel Chocolat	69	0
Warehouse	78	3	The Entertainer	73	-1	Ryman	69	18
Karen Millen	78	0	Boots	72	3	Robert Dyas	69	15
Marks & Spencer	78	-3	Kurt Geiger	72	9	Jimmy Choo	69	5
Cotswold Outdoor	78	19	Coast	72	-3	Dune London	68	0
Superdry	78	0	Selfridges	72	5	Clarks	68	3
Snow+Rock	76	11	Armani	72	20	Quiz	68	NEW
H&M	75	34	Jigsaw	71	2	Superdrug	68	9

Full rankings

RETAILER	SCORE	IMP (+/-).	RETAILER	SCORE	IMP (+/-).	RETAILER	SCORE	IMP (+/-).
Thomas Pink	68	45	Dunelm	65	6	Reiss	63	6
Mint Velvet	68	18	JD Sports	65	-11	Disney Store	63	10
Lakeland	68	12	Harvey Nichols	65	15	Bonmarché	63	7
Wilko	67	14	Jaeger	65	14	Hobbs	63	-11
GAME	67	17	Ernest Jones	65	NEW	Hobbycraft	63	10
River Island	67	8	TK Maxx	65	12	Ann Summers	63	-2
White Stuff	67	1	F.Hinds	65	6	Space NK	63	16
Craghoppers	67	-2	Pets at Home	65	9	Hollister Co.	62	NEW
Richer Sounds	67	21	Apple	64	-6	Early Learning Centre	62	6
Burberry	66	-2	Debenhams	64	14	Furniture Village	62	18
American Golf	66	12	Tessuti	64	10	Mothercare	62	11
Ted Baker	66	-3	The North Face	64	25	Moda in Pelle	62	-9
Tu	66	18	Levi's	64	13	Clas Ohlson	62	3
Sports Direct	66	3	The Range	64	8	Paul Smith	61	-5
Field & Trek	66	6	Hawkin's Bazaar	63	9	Dr. Martens	61	19
Diesel	65	9	Topshop	63	-8	Majestic Wine	61	2
MANGO	65	NEW	Oliver Bonas	63	10	Mamas & Papas	61	-8

Full rankings

RETAILER	SCORE	IMP (+/-).	RETAILER	SCORE	IMP (+/-).	RETAILER	SCORE	IMP (+/-).
The Fragrance Shop	61	4	Miu Miu	58	34	Laura Ashley	54	-5
Better Bathrooms	61	23	Clintons	58	13	Monsoon	54	NEW
Gucci	60	0	Adidas	57	0	Sunglass Hut	54	15
Urban Outfitters	60	-2	H.Samuel	57	NEW	Menkind	54	12
Nike	60	7	Size?	57	-2	Deichmann	54	NEW
Waterstones	60	-9	& Other Stories	57	18	Nespresso	54	21
The Perfume Shop	60	-6	Whittard of Chelsea	57	16	House of Fraser	54	-36
M&Co	60	10	IKEA	57	7	The White Company	54	1
Jack Wills	59	NEW	Drome	56	-6	Anya Hindmarch	54	15
Smiggle	59	11	The Body Shop	56	12	Crew Clothing	54	-2
Peacocks	59	NEW	Lush	56	9	Mountain Warehouse	54	1
Shoe Zone	59	NEW	The Works	56	NEW	Cath Kidston	54	NEW
George	59	-10	Speedo	56	2	Homebase	54	-8
Accessorize	59	NEW	Habitat	56	5	Jessops	54	10
Fortnum & Mason	59	11	Bathstore	55	7	Chain Reaction Cycles	53	0
Moss Bros	59	NEW	Craghoppers	55	10	United Colours of		
ASICS	58	4	Farfetch	54	-5	Benetton	53	5

Full rankings

RETAILER	SCORE	IMP (+/-).	RETAILER	SCORE	IMP (+/-).	RETAILER	SCORE	IMP (+/-).
Missguided	53	NEW	Thorntons	48	13	Dunnes Stores	45	4
Barbour	53	5	Charles Clinkard	48	7	Marc Jacobs	44	-1
Cotton Traders	53	-4	Mulberry	48	20	QD	44	2
Fred Perry	52	-1	Rohan	48	-2	The Whiskey Shop	44	20
Reebok	52	-2	Foyles	48	4	Foot Locker	43	NEW
Harrods	52	7	Dolce & Gabbana	47	2	Aquascutum	43	-1
Build-A-Bear	51	10	Flannels	47	-1	COS	42	0
Molton Brown	50	3	Tweeks Cycles	47	NEW	Specsavers	41	NEW
Dreams	50	-7	Uber Kids	47	NEW	Pull&Bear	41	-24
Interflora	50	-22	TJ Hughes	47	8	Hamleys	39	-3
Demon Tweeks	50	NEW	Oddbins	47	8	LEGO	39	-9
Harveys Furniture	50	12	Crabtree & Evelyn	47	3	Victoria's Secret	39	-6
Bensons for Beds	50	6	Dior	46	-1	Oak Furnitureland	37	5
Hornby	50	5	GAP	46	-1	Scribbler	30	-3
The Pen Shop	50	8	Russell & Bromley	46	-10	Smythson	30	0
Liberty London	49	-2	Home Bargains	45	NEW			
Laithwaite's	48	1	WHSmith	45	10			

Methodology

To create the list of retailers used in this research, we first aggregated various existing lists. We used IMRG financial rankings, web traffic data from Hitwise, Sitemore's usability list, and the high street to create a provisional list of 2,000 companies to research. We eliminated those that did not have a UK presence, those that did not sell online and those that did not sell in any physical stores. The final list is comprised of **200 multichannel retailers**.

The Ampersand Retail Matrix represents our view of the core tenets of multichannel retailers. These tenets cross the boundaries of digital and physical customer experiences, including site UX, delivery, returns, payment etc. Retailers were scored against 28 criteria, with a weighted formula out of 36.325 points, with the final score to be out of 100 ($=100/36.325 \times \text{SCORE}$).

The criteria include the following specifics and scoring:

1. If the retailer's Google PageSpeeds Insights desktop score is >79 - 1 point, and if the retailer's Google PageSpeeds Insights mobile score is >71 - 1 point (the Google PageSpeed Insight algorithm was updated post-research, so we have calculated the Retail Matrix based on the historical like-for-like algorithm).
2. If the retailer's site is transactional on mobile - 4 points.
3. If the retailer uses geolocation technology on mobile - 1 point.
4. If the retailer offers faceted navigation - 1 point.
5. If the retailer has category breadcrumbs - 1 point.
6. If the retailer allows you to check stock in a specific store - 3 points.
7. If the retailer's primary store locator link is clear and easy to find - 3 points.
8. If the retailer uses geolocation technology on desktop - 1 point.
9. If the retailer has product zoom functionality - 1 point.
10. If the retailer offers click and collect in a non-store location - 1 point.
11. If the retailer offers click and collect in a store location - 1 point.

12. If the retailer offers in-store click and collect next day or faster - 1 point.
13. If the retailer offers 2 hour home delivery - 1 point.
14. If the retailer offers same day home delivery - 1 point.
15. If the retailer offers next day home delivery - 1 point.
16. If the retailer offers next day home delivery when ordering on a Sunday - 1 point.
17. If the retailer offers guaranteed Sunday home delivery - 1 point.
18. If the retailer offers evening home delivery - 1 point.
19. If the retailer offers named day or nominated home delivery - 0.575 points.
20. If the retailer's delivery and returns information is easy to find - 1 point.
21. If the retailer offers free returns by post - 0.25 points.
22. If the retailer offers free returns to store - 0.5 points.
23. If the retailer offers free returns by collection - 1 point.
24. If the retailer clearly shows accepted payment icons before the cart / checkout - 1 point.

25. If the retailer offers a guest checkout - 1 point.
26. If the retailer offers alternative payment methods other than credit or debit card - 1 point.
27. If the retailer offers a persistent cart - 4 points.

All research was completed in Greater Manchester, UK between 8th October 2018 to 19th November 2018. Ampersand provides the information in this report 'as is'. It is based on the researcher's judgement of each site at the time of testing and in relation to documented guidelines. If there was ambiguity on any criterion in relation to what delivery or returns options a retailer offers, we have only given a retailer a scoring point if the policy was clear.

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Conclusion

Scores within the Ampersand Retail Matrix have increased again this year. Retailers across the industry are developing their multichannel customer experience. On average, median retailer scores grew by 6 points. As in previous years, we have seen a marked improvement in digital capability. In particular in-store stock availability, geolocation, persistent carts, guest checkouts and faceted navigation.

Customers expect more and more from their beloved retailers. Those that fall behind will suffer the worst of the headwinds facing retailers. This year's developments will be next year's must-haves.

Some retailers are still struggling to make significant progress in technical developments. Nevertheless, there is no barrier to providing clear delivery and returns policies. Whether it is intentional or not, ambiguous language is still common.

Retailers must take a long-term view of technology. Retailers must strive to break down silos in their organisation and their ecommerce technology. They must build a technology strategy to support implementation of the 'next thing'. They should expect to throw things away. They must decide if they want to play catch up, keep up or build the future. A flexible technology architecture is as important as a flexible org' chart.

For retailers locked-in to legacy, monolithic platforms these are the hardest areas to tackle. Their survival depends on matching the accelerating pace of change. Without this, they will never meet the growing demands of tomorrow's shopper.

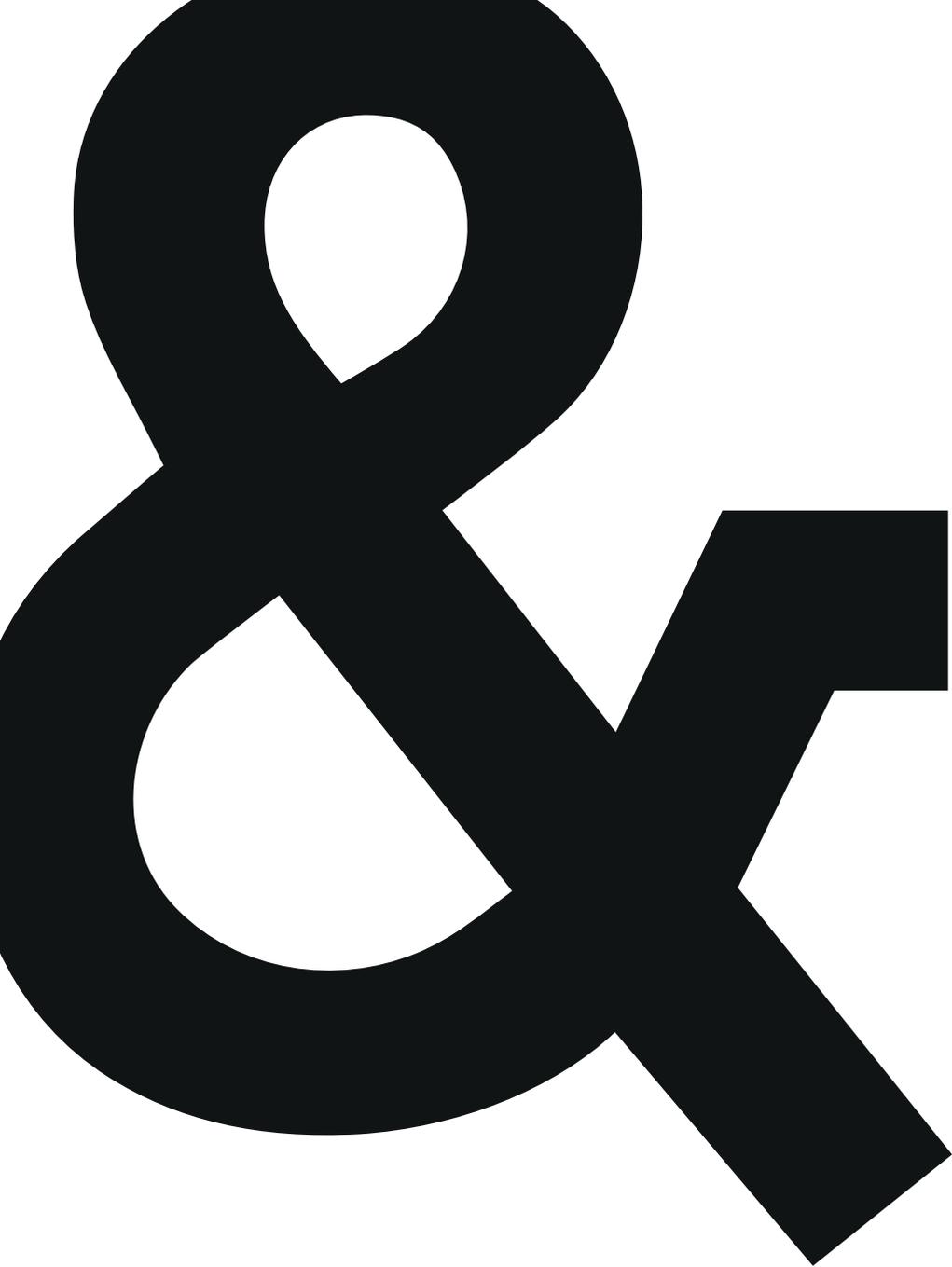


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We are a straight-talking ecommerce agency.

We help ambitious retailers who want to make a step-change with their ecommerce strategy.

We architect & deliver solutions that create better customer experiences and positive operational change. We are a team, full of smart people, focused on tackling hard problems.

We are not here to replace your current monolith with a new one. We believe in technological agility and avoiding vendor lock-in.

Let us show you what better looks like.

