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Health & Beauty Top 50: Ecommerce Report

2021 Adobe Commerce Edition





Health & Beauty Top 50: Ecommerce Report

A benchmark report of 50 health & beauty ecommerce retailers. Featuring hair & grooming, cosmetics & makeup, vitamins supplements, body & skincare and fragrances & perfume

Discover how Adobe Commerce health & beauty retailers are performing in speed & security, trust, search & navigation, payment & checkout, community & loyalty, delivery and returns and more

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A word from Fluid Commerce

66 Welcome to the second edition of our annual Health & Beauty Ecommerce Report, a benchmark report analysing 50 of the sector's leading retailers. The primary aim of this report is to analyse the industry and identify key trends that other retailers can benchmark against.

The secondary aim of this report is to understand which Health & Beauty retailers are performing well at ecommerce by meeting the latest in best practice guidelines.

Retailers were marked against the following themes:

- Speed & Security
- Trust
- Navigation
- Product Page
- O Checkout & Payment
- Delivery & Returns
- Community

Inside, you will discover the top scorers, the top scorers by theme, plus best-in-class examples.

Covid 19 and Ecommerce

It would be remiss to not discuss the impact of Covid 19.

The data for the 2020 report was collected in May 2020, and the data for this report was gathered in August 2021. This means our report not only gives a benchmark score, but also demonstrates how retailers have reacted since the pandemic began.

One indication of this is a few notable entries in our top ten. These retailers have made considerable improvements to their online stores in the last 12 months:

- O Cytoplan #1 in 2021, up from #17 in 2020 (+15 points)
- O Executive Shaving #2 in 2021, up from #16 in 2020 (+14 points)
- O Bodybuilding Warehouse #4 in 2021, up from #26 in 2020 (+14 points)

Akoma Skincare made the largest improvement. It moved up 16 points from #43 in 2020 to #18 in 2021 with a score of 65 (out of 100) in 2021.

Broken down by sector, hair & grooming has made the largest improvement. The industry average score in 2020 was 55, and in 2021 this has shot up to 66. With hair salons closed for large chunks of the past 18 months, it is perhaps no surprise that retailers have invested in their online stores to soak up the demand from DIY hair stylists.

With life almost back to normal, the impact of the pandemic on ecommerce will not fade quickly. Customers are ever more savvy and demanding of a slick, smooth and speedy shopping experience.

Many of the retailers in the 2021 Health & Beauty Report have risen to the challenge, but many more have a lot of work ahead of them if they wish to remain competitive in an increasingly crowded market.

We hope you find the 2021 Health & Beauty Report from Fluid Commerce and Adyen useful. If you have any questions, our contact details are available on the back page of this report.

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Managing Director - Fluid Commerce

Health & Beauty Top 50 Ecommerce Report fluidcommerce.co.uk

A word from Adyen

The UK is once again open for business. But is it business as usual? As Health & Beauty retailers begin to plan for 2022, they may be asking themselves: What's next? What do shoppers expect now? What's changed forever? And what do I need to prepare for?

Health & Beauty retailers continue to lead the way in digitising their channels. From consolidating technologies such as payments and unifying experiences, they continue to ensure that as they innovate, digital is recognised as their largest shop window.

Connecting channels means you can provide a cohesive experience whether your shopper is on your website, on Instagram, or phoning your call centre. This unified commerce approach is a lot easier if all your payments feed into the same system. It not only makes reconciliation easier but gives you useful insights into shopper behaviour and preferences.

Another important consideration is loyalty. At a time when shoppers are becoming more discerning and selective, securing their loyalty is key. But plastic loyalty cards are no longer cutting it. They're rarely to-hand when needed and mostly they just serve to clog up people's wallets. A more elegant approach is to connect your loyalty program to your shopper's payment card. In this way, your program can follow your shoppers from channel to channel without requiring any further action from them.

By consistently rewarding your customers, you'll increase the stickiness of your program. Plus, you'll learn a lot more about them so you can be sure your offers are relevant. Payment-linked loyalty is growing in popularity and consumers increasingly expect it. Our latest research found that 63% want retailers to adopt this method.

And finally, the peak sales period is almost upon us. And, of course, with the rise of transaction volume comes the rise in payment fraud. That, coupled with the pending PSD2 mandates, means more and more retailers are investing in strong customer authentication (SCA). In this world of digital wallets and biometrics, SCA is no longer the conversion-killer it used to be. And, as consumers wise-up to the threats of fraud, many will find it a comfort. So, now's the time to ensure you're up-to-date and offering the most frictionless authentication experience possible.

Congratulations to everyone who has made the top 50, showcasing great examples of businesses offering outstanding and innovative customer experiences through their ecommerce solutions. We'd be happy to chat to you to explore how you might be able to future-proof your payment setup and reach new customers - do get in touch using the contact details at the back of this report.





Colin Neil Managing Director, UK - Adven

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Scoring

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Benchmarking

How the Industry Compares



Benchmarking

► **61**/100 Average Score

The average score for all health and beauty retailers is 61 out of 100.

E 66% Hair & Grooming

№ 62%
Vitamins & Supplements

₹ 60%

Body & Skincare

4 60% Cosmetics & Makeup

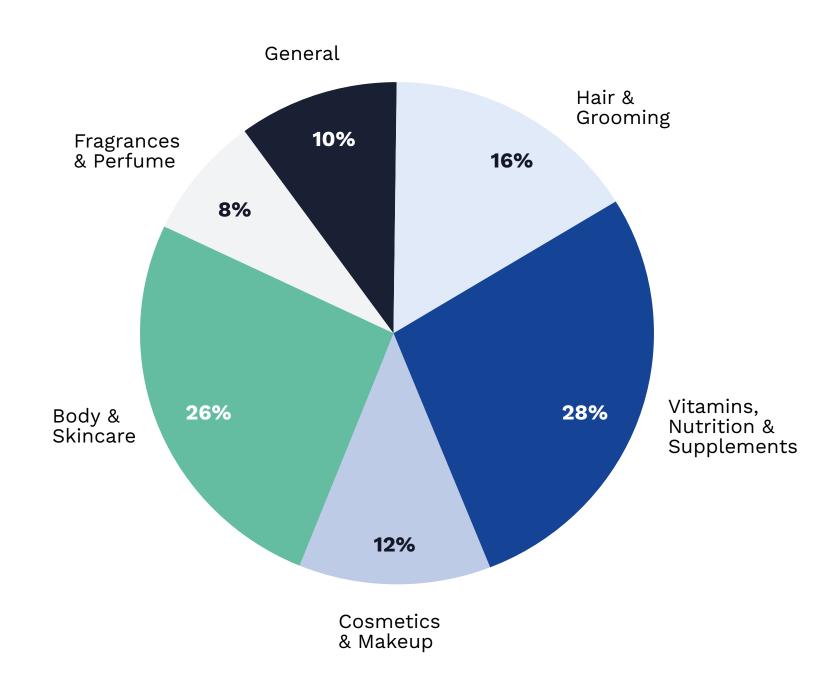
61%

Fragrances & Perfumes

⊕ **54**% General

Retailer Overview

We included a broad range of health & beauty ecommerce stores in this report to ensure a diverse yet fair representation of the sector in the UK.

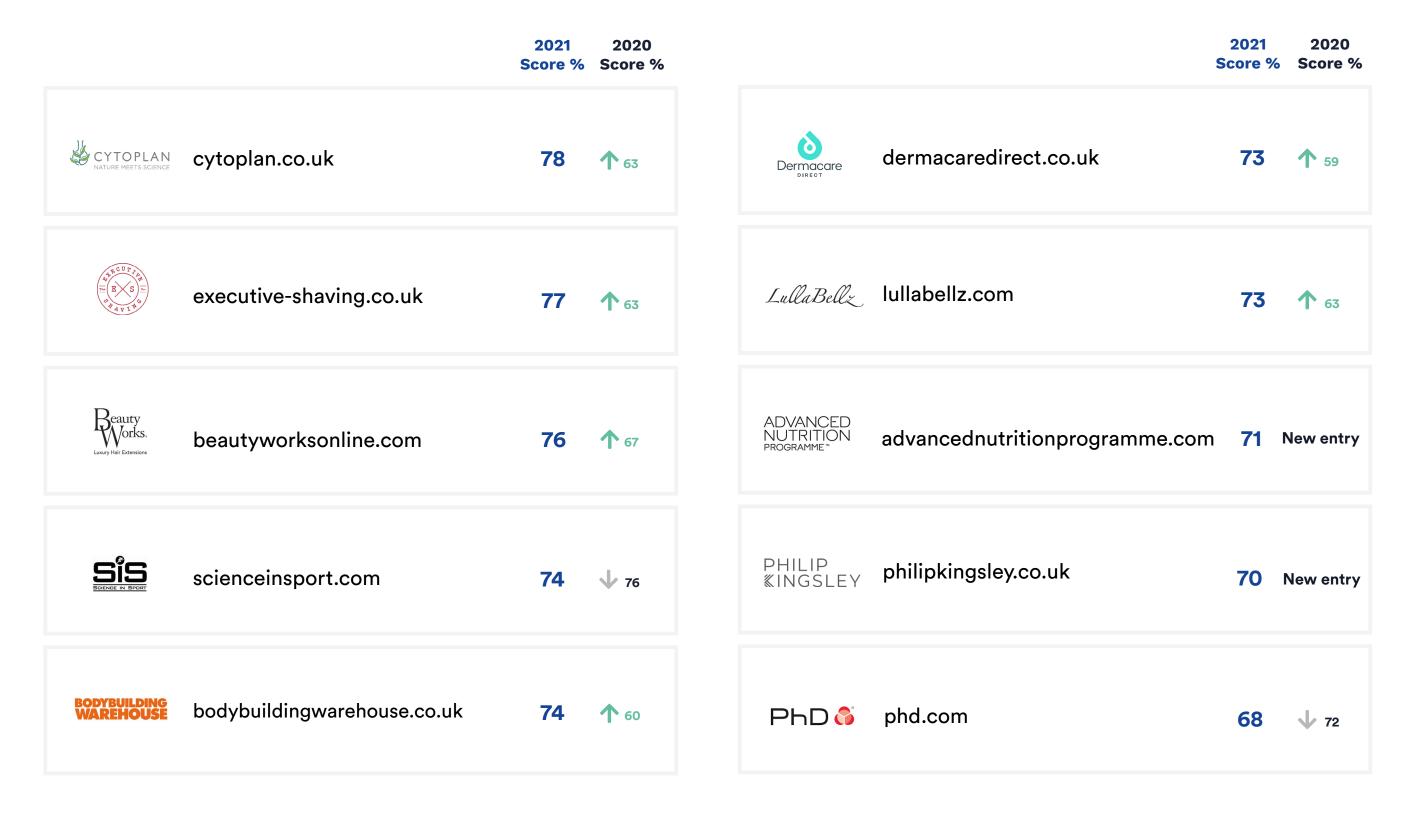


Health & Beauty

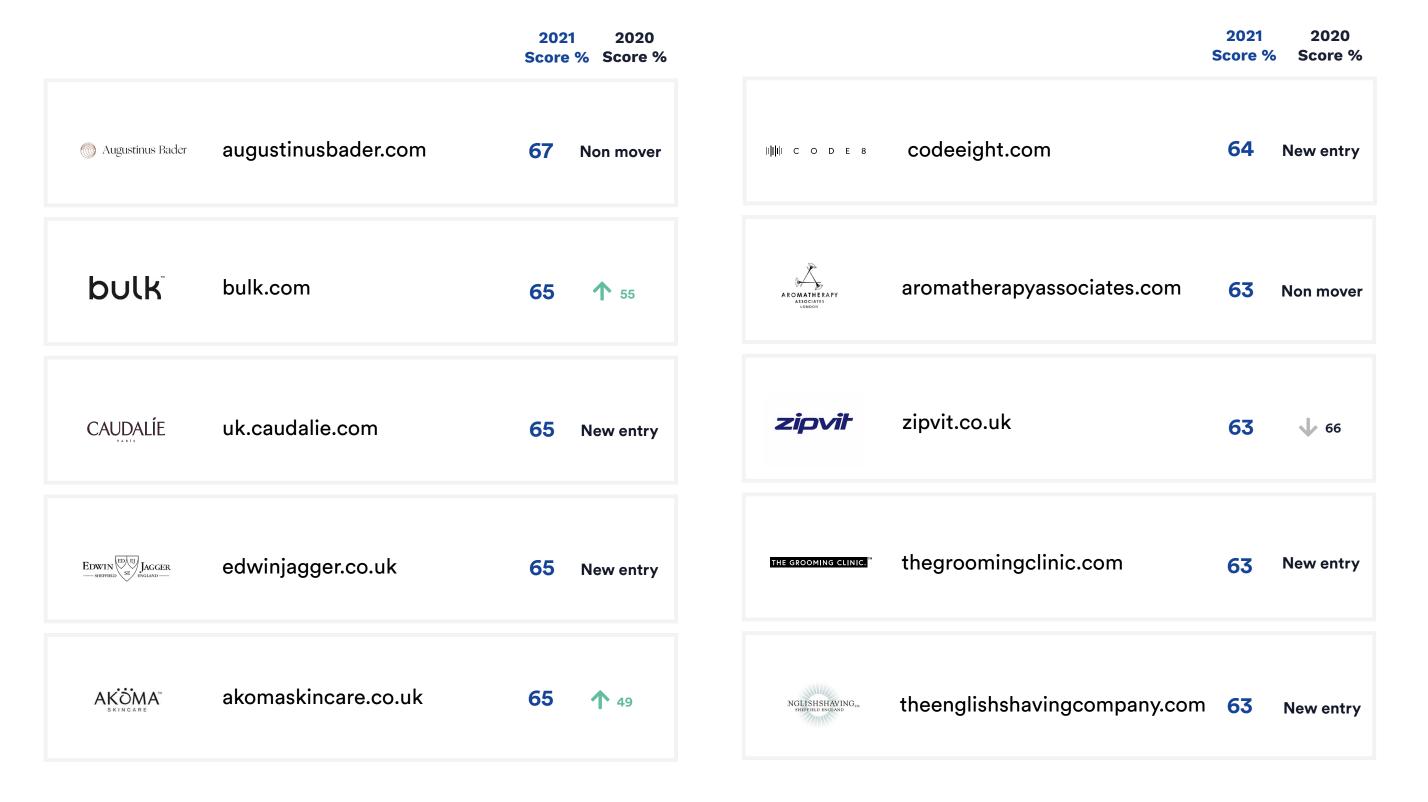
Top 20 Retailers



Top 20 Retailers



Top 20 Retailers



Health & Beauty

The Lower Rankings

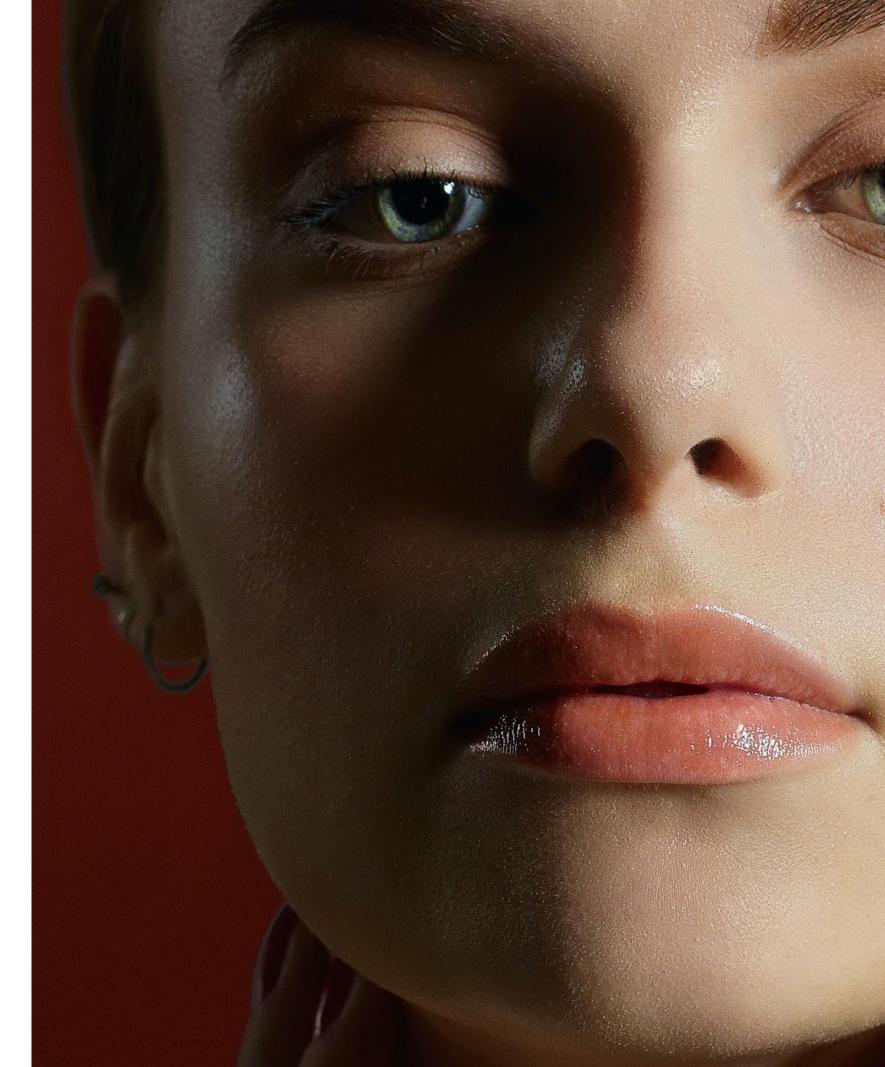


Lower Rankings

| | Score % | | 2021 Score % | 2020 Score % |
|----------------------------|-------------|-----------------|-----------------|-----------------|
| Alyaka 63 | ↓ 74 | PANACHE LONDON | 58 | New entry |
| SkinSpirit 62 | New entry | Unineed | 57 | 4 61 |
| HD Brows 62 | ↑ 60 | Creed | 57 | New entry |
| BYREDO 62 | New entry | Dr Sebagh | 55 | New entry |
| Salons Direct 62 | New entry | AURELIA LONDON | 55 | New entry |
| Blackburn Distributions 61 | ↑ 54 | Bad Norwegian | 55 | New entry |
| ELEMIS 61 | ↓ 67 | (MALIN+GOETZ) | 54 | New entry |
| Perfume Plus Direct 61 | ↑ 59 | PowerBody.co.uk | 54 | New entry |
| SARAH CHAPMAN London 61 | New entry | TEMPLESPA | 54 | New entry |
| Swisse Me 60 | ↓ 62 | Fushi Wellbeing | 54 | ↓ 60 |

Lower Rankings

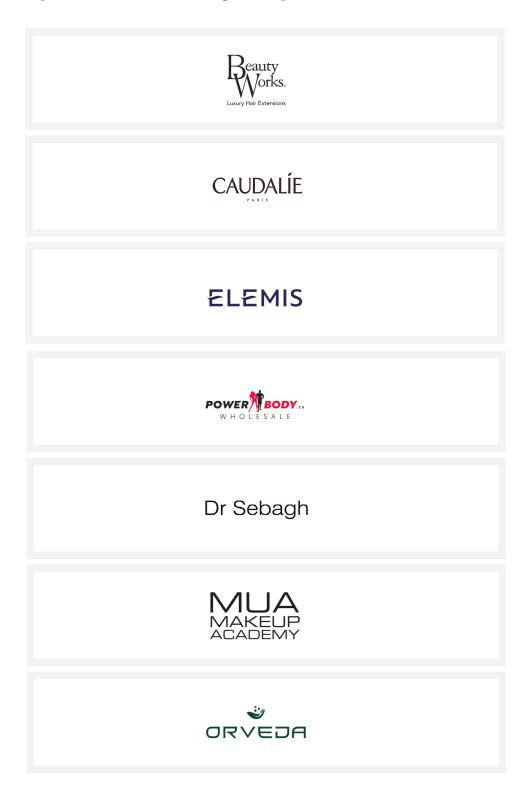
| | 2021 Score % | 2020 Score % |
|----------------------|-----------------|-----------------|
| VIEVE | 53 | New entry |
| Color Wow | 52 | New entry |
| Functional Self | 52 | ↓ 62 |
| Clamanti Cosmetics | 52 | ↓ 60 |
| Hellenia Healthfoods | 51 | ↓ 56 |
| MUA Makeup Academy | 51 | New entry |
| IL MAKIAGE | 51 | New entry |
| Zest Beauty | 50 | ↓ 56 |
| 4Beauty Group | 49 | ↓ 50 |
| Bens Natural Health | 48 | ↓ 50 |



Speed & Security



Speed & Security: Top Brands



Speed & Security

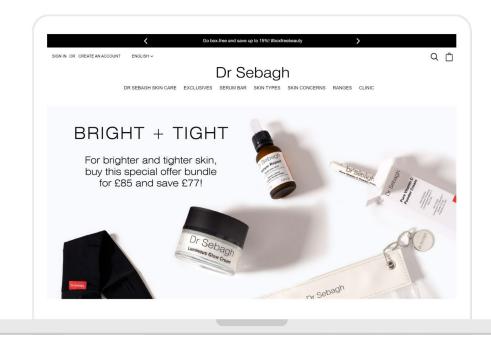
Busy customers need a fast site to make sure they can make their purchases as quickly as possible. A site that takes too long to load will lead to frustrated users giving up and shopping elsewhere.

We measured retailers' site speed scores using Google PageSpeed Insights, which provides a score out of 100 for mobile speed and desktop speed. In general, Health & Beauty retailers performed well for speed on desktop but mobile was a struggle for most.

- The average score for desktop speed was 57
- O The average score for mobile speed was a low 18

Security is also an important factor to consider when optimising user experience. **100%** of the retailers included in this report had invested in SSL certificates.

However, no retailers had an EV (Extended Validation) SSL, the highest form of SSL certificate available.



Dr Sebagh was the fastest on desktop, with a near-perfect score of **98**. Its mobile score, **31**, was also among the highest

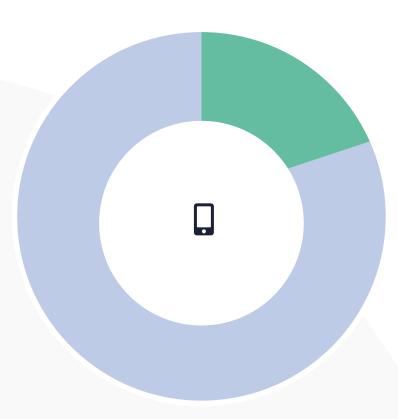
Key Takeaways: Speed

18

Average Mobile Speed

Fastest on Mobile

- Beauty Works
- O Advance Nutrition Programme
- Programme
- SkinSpirit
- O Dr Sebagh

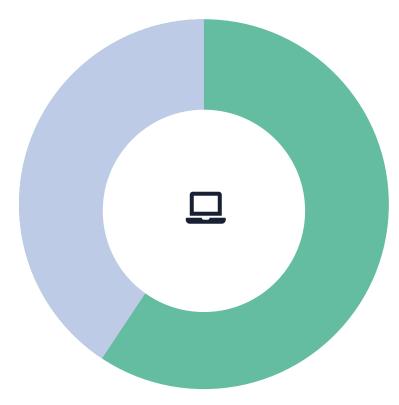


10% of retailers had a mobile speed score above 30



Fastest on Desktop

- O Dr Sebagh
- O ELEMIS
- Caudalie
- O MUA Makeup Academy
- Beauty Works



57% of retailers had a desktop speed score above 50

Note: Page speed times change at different times of the day and week. Retailers were tested on two occasions for an average score.

Trust



Trust

The mark of a good website is its trust factor - a UX element looked for, valued and ranked by Google. Customers look for and appreciate trust signals such as reviews, money-back guarantees and other reassurance messaging.

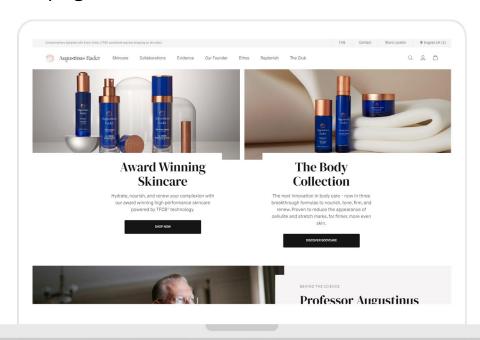
Positioning trust signals clearly across your website gives consumers confidence in a brand, particularly if it is one that they are unfamiliar with. A well-placed review can help tip the shopper from a casual browser to an active buyer.

This was understood by most of our health & beauty retailers:

- 98% had some form of trust signalling
- 38% scored the maximum points

We scored for:

- O Reassurance icons or messaging on the homepage header
- O Reviews on the home page
- O Reviews on the product page



Augustinus Bader highlights its various awards across its homepage to demonstrate its trustworthiness. It also showcases founder Augustinus Bader's credentials, how the skincare works, customer reviews and delivery information

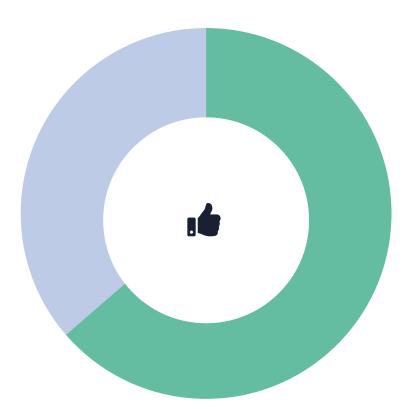
Key Takeaways: Trust



94% reviews on product page



44% reviews on homepage

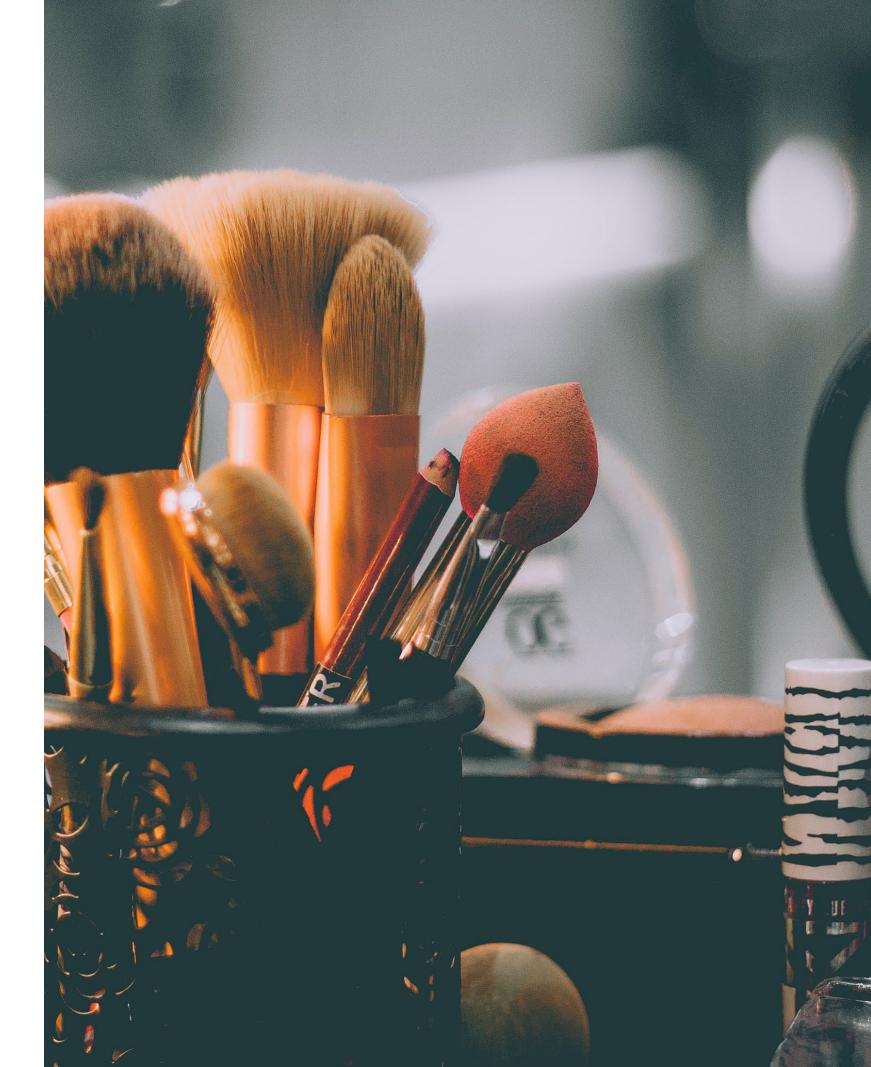


66% reassurance messaging on homepage

Trust

Review Platforms

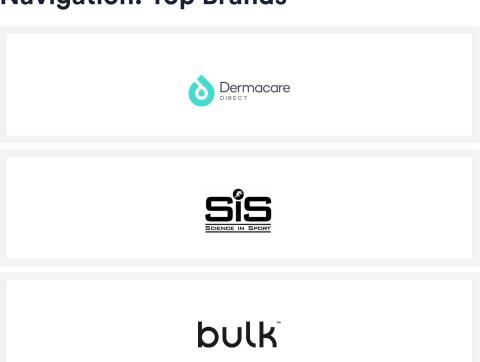




Navigation

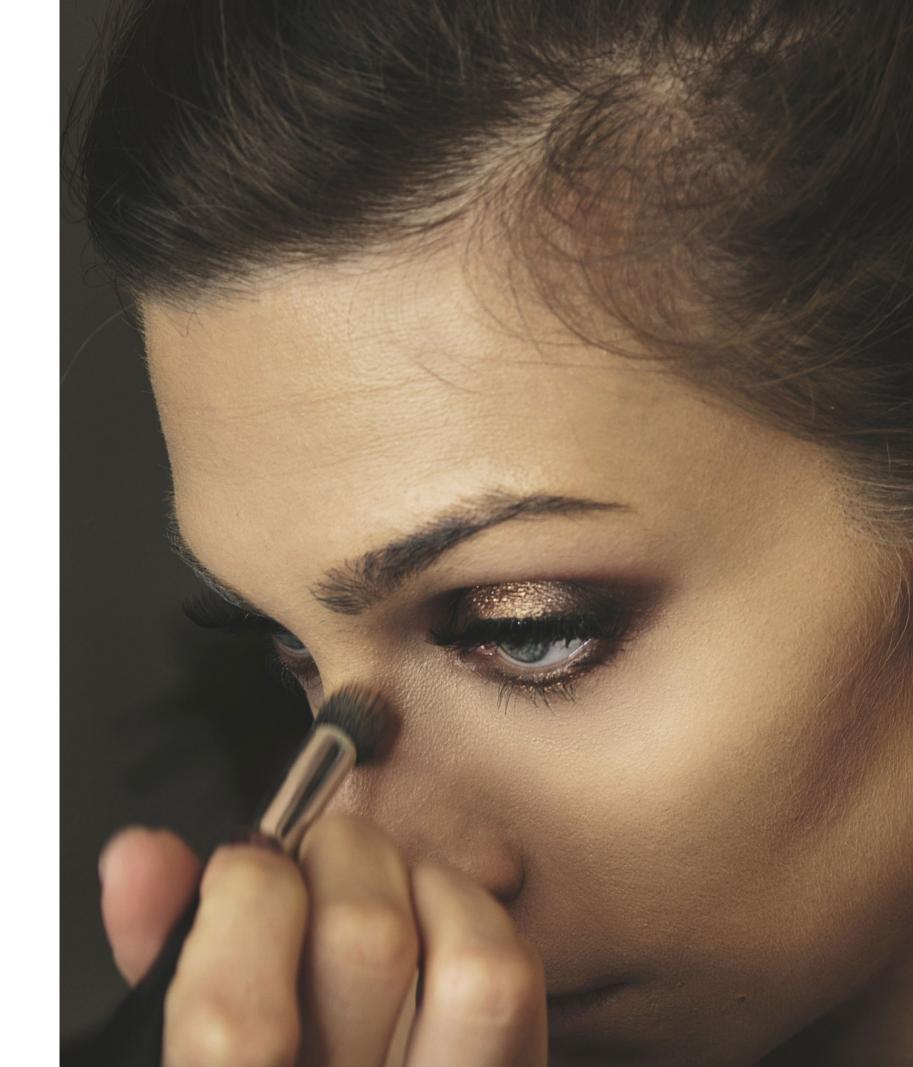


Navigation: Top Brands









Navigation

Being able to locate the products you want easily and quickly is a fundamental part of UX. It is the ecommerce store's job to help customers find what they are looking for with the minimal amount of effort - navigation must be intuitive, fast and helpful.

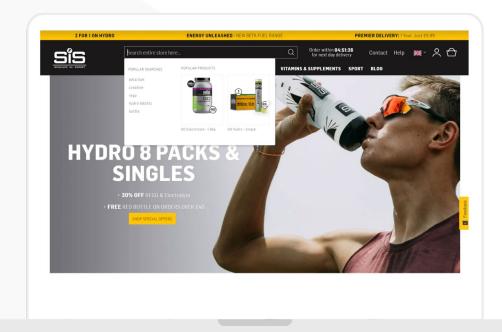
We scored brands on:

- O Site search and live chat
- O Breadcrumbs on category pages and product pages
- Sorting and filtering tools

Site Search

Search is an area where ecommerce stores can really excel and set themselves apart. **100%** of our retailers offered a search function.

However, a few stores pulled ahead by offering a more sophisticated site search, such as returning specific products.



Science in Sport offers product suggestions even before you start typing. It gives a range of suggestions, offering category suggestions and specific products

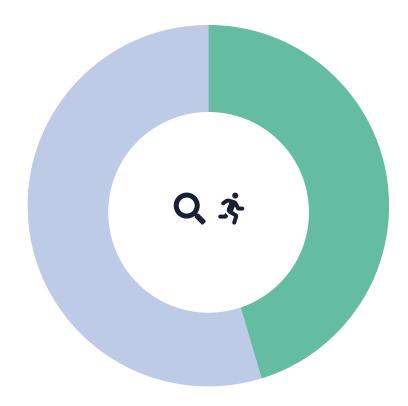
Key Takeaways: Site Search



100% site search



72% dynamic search with product suggestions



48% dynamic search

Filter & Sort

Filtering and sorting are standard UX elements, however the Health & Beauty sector was a little reluctant to use them.

Two thirds, 66%, of brands offer a filter option on their category pages.

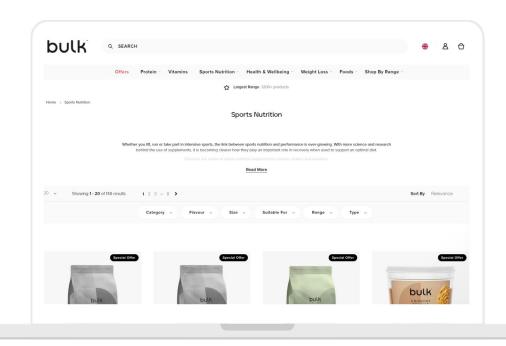
In contrast, our other 2021 reports found that 92% of Jewellery & Accessory brands and 93% of Home & Garden retailers offer shoppers a filter.

One explanation is product range: several of the Health & Beauty merchants had a limited product range, particularly those with a higher price point. Due to this, a filter is not strictly necessary.

The use of sort was slightly higher, with 70% allowing customers to sort by price, relevance, popularity, name and so on.

Of those retailers who included a sort option:

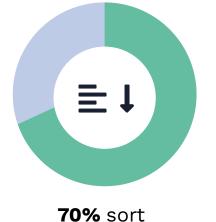
- **66%** offered 'sort by price'
- 16% allowed users to sort by 'best seller', 'most popular' or 'top picks'



bulk allows users to filter by category, size, flavour and range. Customers can also sort products by popularity, price and name

Key Takeaways: Filter & Sort









66% sort by price

16% sort by popularity

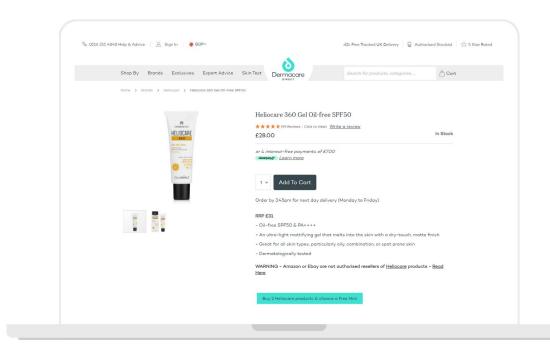
Breadcrumbs

Essential for navigation, breadcrumbs help users move around easily on a site - going back multiple steps or skipping to a subcategory in a single click if required.

If there are no breadcrumbs, it can be tricky for a user to move around a website. Without a clear path to the previous page or category page, shoppers can end up feeling frustrated or lost. And if a shopper gets irritated with the user experience, this increases the likelihood that they will bounce away without making a purchase.

Most Health & Beauty merchants employed breadcrumbs on their category pages, however this dropped to just half on the product page.

- **70%** of merchants included breadcrumbs on their category pages
- **50%** used breadcrumbs on product pages

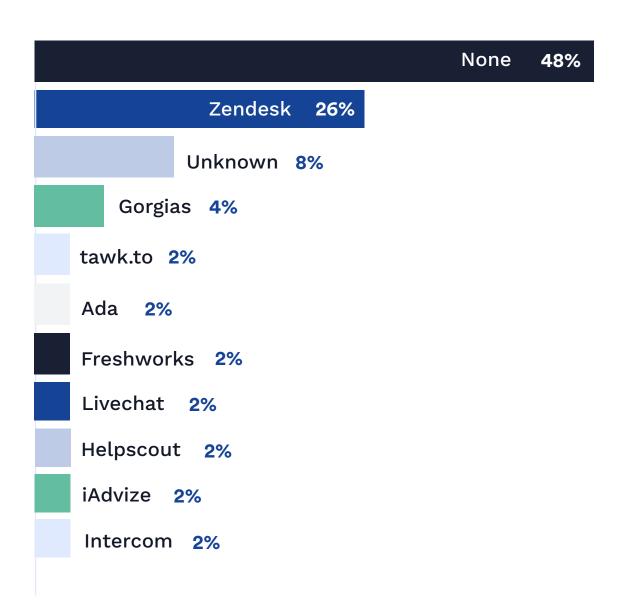


Dermacare DIRECT has clear, easily navigable breadcrumbs across its site on both its category pages and product pages

Live Chat

A live customer service is an excellent way to help users by answering their questions on demand. If a shopper can't find what they need, then a visible Live Chat option, or one that pops up at well-timed moments, can encourage sales.

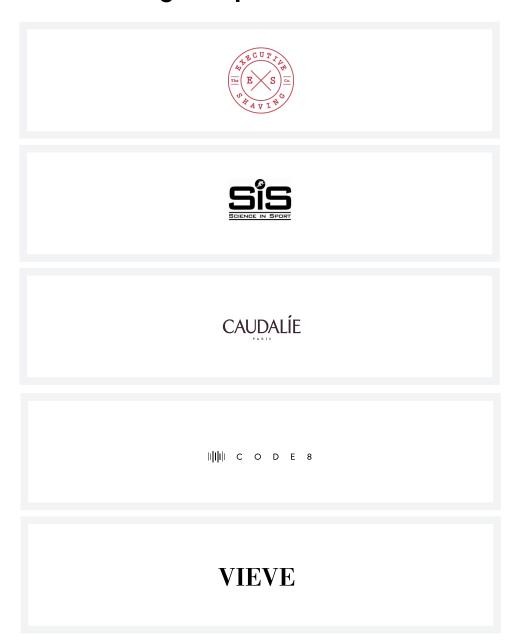
Just over half, (52%), of our retailers offered a live chat option.



Product Page



Product Page: Top Brands



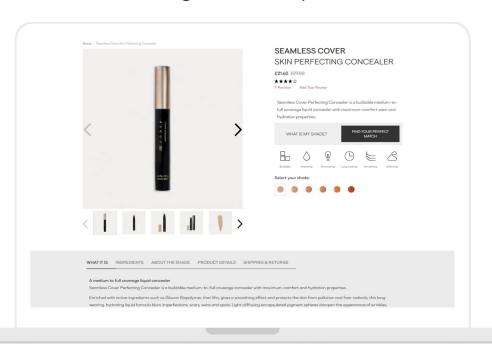
Product Page UX

Product pages are where the buying and selling happens. A well designed, UX-optimised product page can make a dramatic difference to your conversion rate and average order value, as well as your overall sales and revenue.

Merchants who got it right offered a range of high-quality imagery to help shoppers visualise what the product would be like in real life. This was supported by controllable zoom options - **52%** of retailers offered this on desktop, and **88%** offered it on mobile.

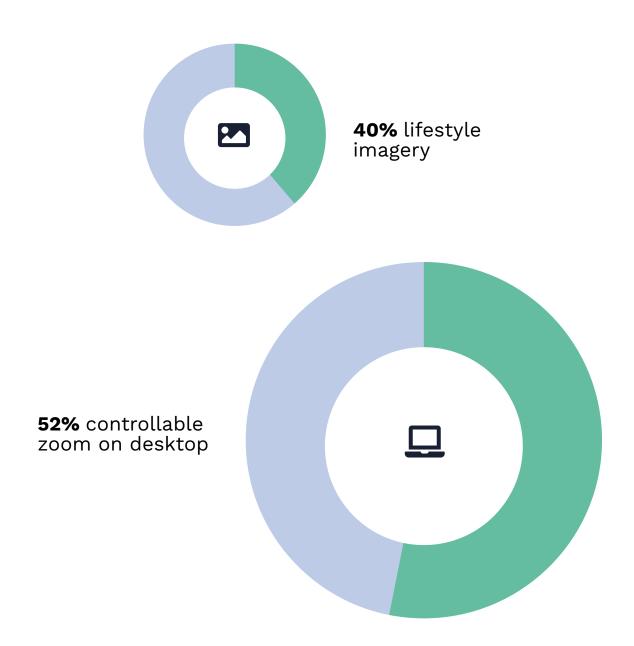
In addition, their product pages were information-rich, answering any questions and preempting any objections a customer might have.

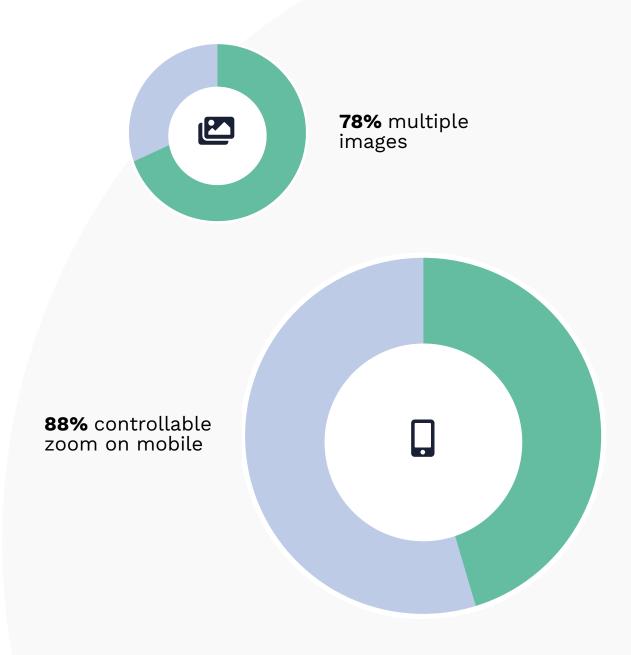
Finally, exemplary stores maximised sales by presenting further product recommendations. Health & Beauty retailers were excellent for this, with **88%** offering recommendations such as 'You Might Also Like', 'Customers Also Bought' or 'Complete Your Kit'.



Code8 offers a large range of images, with controllable zoom on desktop and mobile, so shoppers can easily see what they're buying. It also included reviews, a list of ingredients, shipping & returns information, and a video on how to apply the product

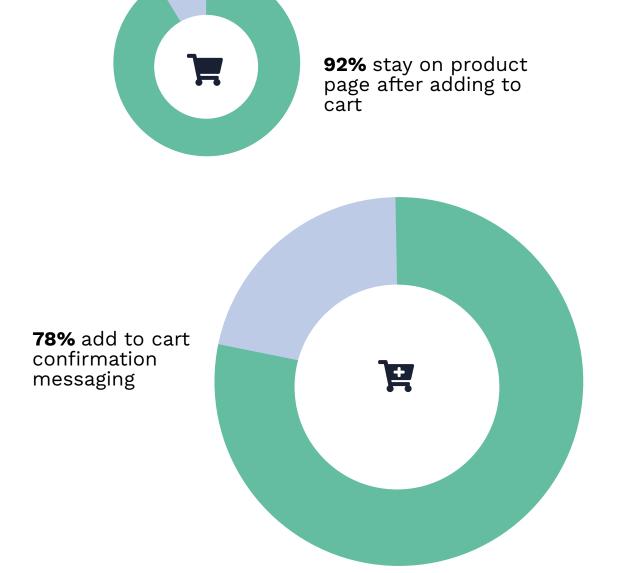
Key Takeaways: Product Page



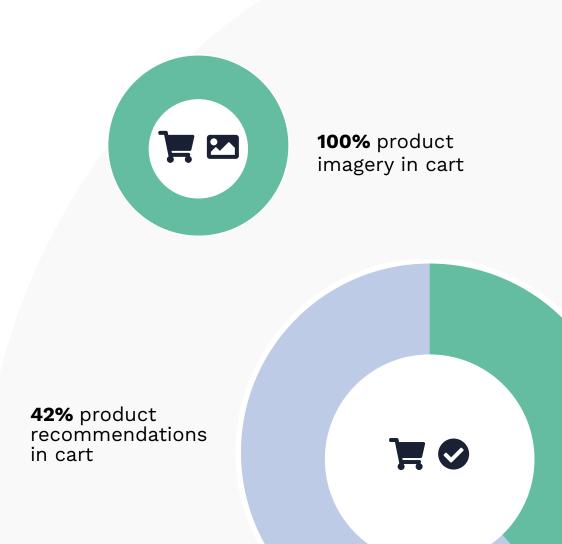


Key Takeaways: Checkout

Product Page



Cart



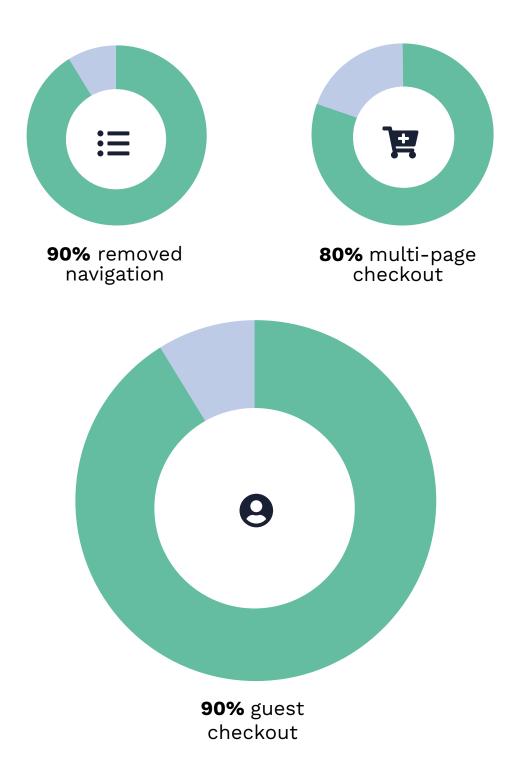
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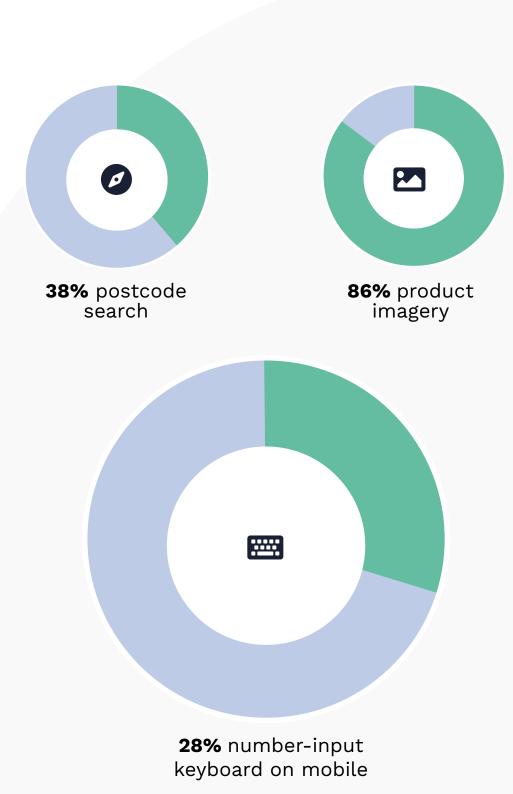
Checkout & Payment



Key Takeaways: Checkout

Checkout





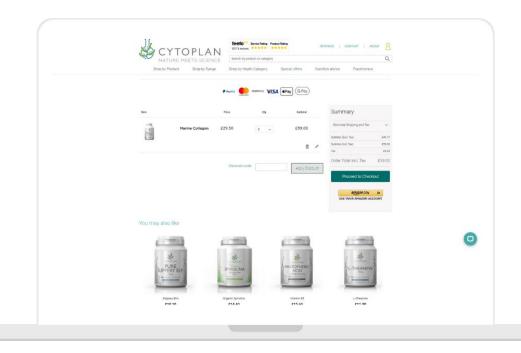
Payment

Payment is the critical point of any sale. However, optimising the payment process is often overlooked by merchants. Shoppers require the payment transaction to be easy, quick, and entirely secure.

As such, **64%** wisely chose to display their payment options on their sites before users even arrive at the checkout.

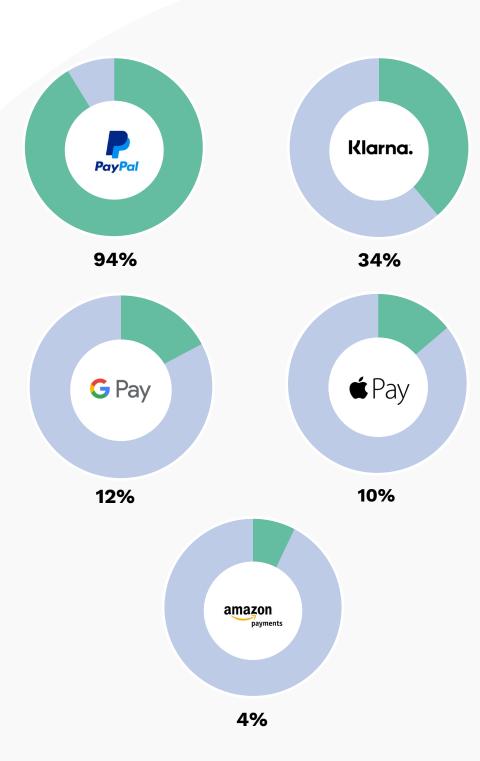
In addition, the boom in payment options means that customers now expect to be able to pay with their preferred method. This could be instant pay with Google Pay, Apple Pay and Amazon Pay, or the option to spread payments using a solution like Klarna or Clearpay.

Both types of payment tick all of the right boxes by offering convenience, speed and security.



Cytoplan came out on top as it offers the largest range of payment options, including Amazon Pay, Apple Pay, Google Pay and Paypal

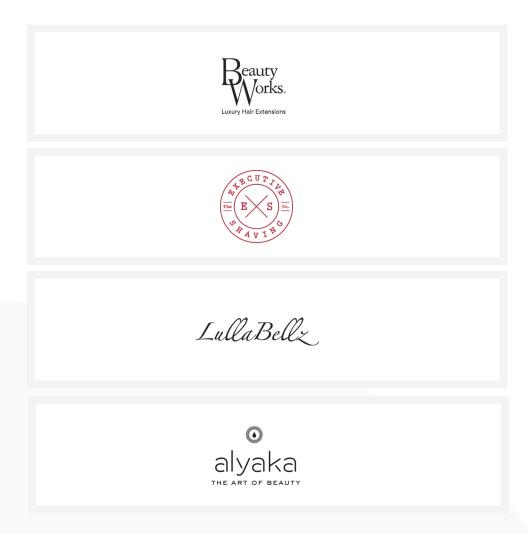
Key Takeaways: Payment



Delivery & Returns



Delivery & Returns: Top Brands



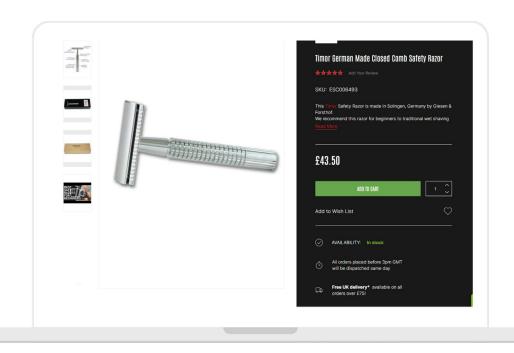
Delivery & Returns

Over the last 12 months, delivery has been a challenge for many. While online shopping boomed, many retailers struggled to keep pace with demand. When coupled with supply issues caused by Brexit, merchants have had to double their efforts to keep customers happy.

None of the reviewed merchants scored the maximum amount of available points. However, our four top brands came very close.

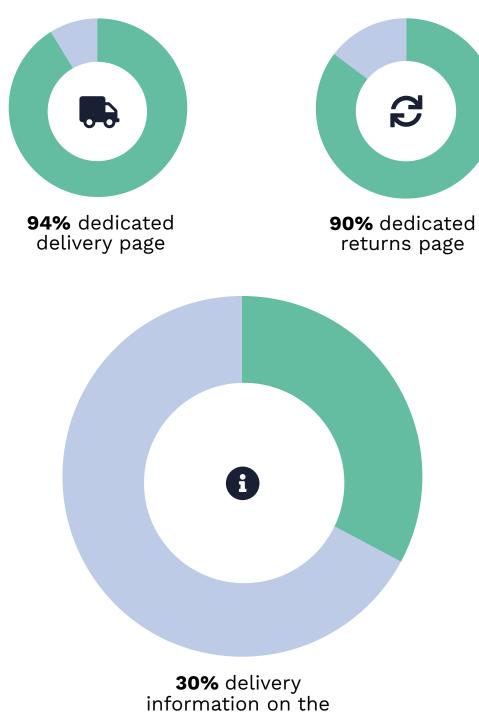
Transparency and communication have never been more important and so we looked for clear and easily-accessible delivery information. While nearly all **(94%)** had a dedicated delivery page, only **30%** had delivery information on the product page.

We also scored brands highly for offering a range of delivery options that allow the customer to pick and choose according to their needs and budget.



Executive Shaving clearly displayed delivery information on the product page. It also offered free delivery, as well as next day and nominated-day delivery

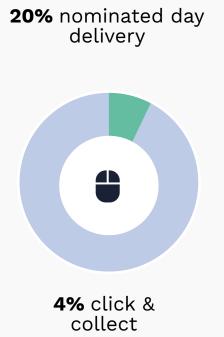
Key Takeaways: Delivery & Returns





90% free

delivery



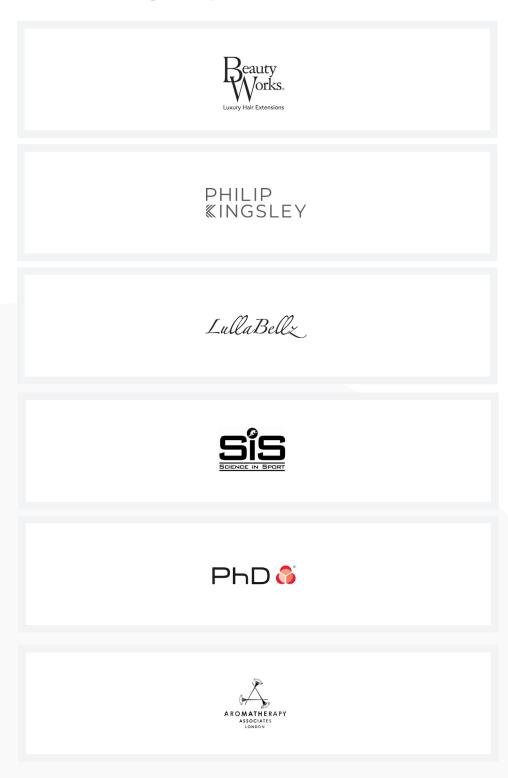
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Community



Community: Top Brands



Community

With shops shut intermittently over the past 18 months, ecommerce retailers have gone the extra mile to build and maintain an engaged community of customers. Loyal brand ambassadors are fantastic for making repeat purchases and in advocating for a store and its products.

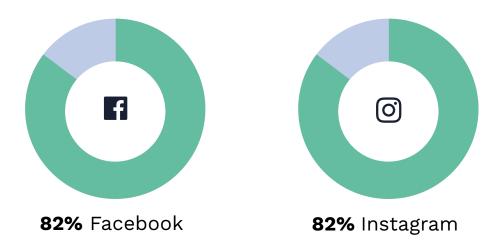
Most of our retailers rose to this community challenge through the use of their social media accounts. Facebook and Instagram were the most popular channels, with **82%** of health & beauty merchants sharing content on them regularly.

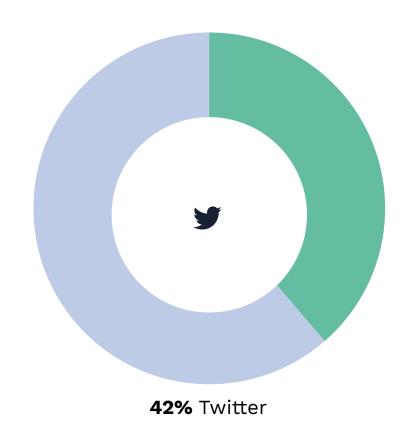
Nearly all **(92%)** offered a newsletter sign up form, however only **42%** used a newsletter pop up to encourage shoppers to sign up. Considering that email marketing is a huge driver of revenue, this is a big missed opportunity.

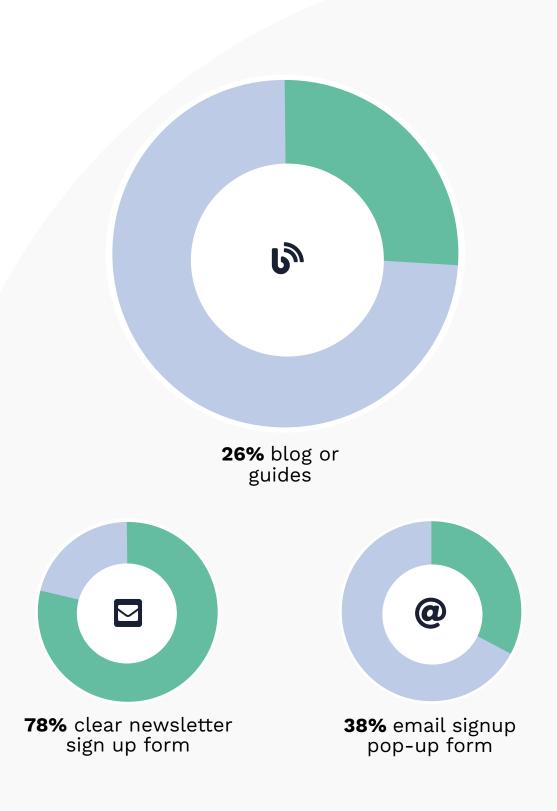


Philip Kingsley displays an newsletter pop-up form soon after the user lands on the site with a 10% off discount offered as incentive

Key Takeaways: Community







Scoring Criteria



Scoring Criteria

The Health & Beauty merchants were chosen to represent the average ecommerce retailer in this sector. The final list of fifty merchants gives us a useful insight into the industry that other retailers can benchmark themselves against. The scoring system is based on Fluid's view of ecommerce best practice, covering speed and security, user experience, search and navigation, community and loyalty, payment and checkout, and delivery and returns.

Scores are weighted across 57 criteria with 23 scoring points available. Retailers' final scores are converted to a percentage using the formula: =100/23*(Score).

Speed

Using Google PageSpeed Insights score (out of 100)

Mobile speed:

- **0.25 pts** if scored between 25 50
- **0.5 pts** for 50 75
- **0.75 pts** for 75 100

Desktop speed:

- **0.25 pts** if scored between 25 50
- **0.5 pts** for 50 75
- **0.75 pts** for 75 100

Security

0.25 pts for SSL**0.75 pts** for EV SSL

Trust

0.5 pts for reviews on the homepage0.5 pts for reviews on product page0.5 pts for reassurance icons or messaging on homepage

0.5 pts for live chat

Navigation

0.25 pts for breadcrumbs on category page

0.25 pts for breadcrumbs on product page0.5 pts for filter on category page

0.25 pts for a sort function

0.25 pts for sort by price

0.25 pts for sort by popularity

0.5 pts for on-site search

0.25 pts for dynamic search with suggestions

0.25 pts for dynamic search with product suggestions

0.5 pts for live chat

Product Page

0.5 pts for product imagery
0.5 pts for lifestyle product imagery
0.5 pts for multiple product images
0.5 pts for product recommendations on product pages

Desktop

- O.5 pts for product zoom
- **0.5 pts** for controllable zoom

Mobile

- O.5 pts for mobile-responsive website
- **0.5 pts** for product zoom
- O 0.25 pts for Double Tap zoom
- O.25 pts for Pinch zoom

Delivery & Returns

0.25 pts for easy-to-find delivery information

0.25 pts for easy-to-find returns information

0.5 pts for delivery information on the product page

0.5 pts for next day delivery

0.5 pts for named day delivery

0.5 pts for free delivery

0.25 pts for click and collect

0.25 pts click and collect to store or warehouse

Community

0.25 pts for an active Facebook, updated within the last two weeks

0.25 pts for an active Twitter, updated within the last two weeks

0.25 pts for an active Instagram, updated within the last two weeks

0.25 pts for a clear email newsletter signup

0.25 pts for email newsletter signup pop

0.25 pts for a blog or helpful guides section

Checkout & Payment

0.5 pts for staying on page after adding to cart

0.5 pts for add-to-cart messaging

0.5 pts for product imagery in the cart0.5 pts for product recommendations in the cart

0.5 pts for product imagery in the checkout

0.5 pts for a multi-page checkout

0.5 pts for removed navigation in the checkout

0.5 pts for postcode lookup

0.5 pts for guest checkout

0.5 pts for visible payment icons before the cart

0.5 pts for Klarna, Clearpay or similar

0.25 pts for PayPal

0.25 pts for Amazon Pay

0.25 pts for Google Pay

0.25 pts for Apple Pay

0.25 pts for secure payment provider, e.g. Adyen, Stripe or Opayo

Mobile

- O.25 pts for email-input keyboard
- O 0.25 pts or numeric keyboard

This report was created by Fluid Commerce in partnership with Adyen.

All research was conducted in August 2021.

Analysis and scoring was based on the researcher's judgement, but does relate to documented guidelines. If a policy was unclear, no scoring point was awarded.

Your Score

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Fluid Commerce is a multi-award-winning ecommerce growth agency.

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