

Home & Garden Top 50: Ecommerce Report

2022 Adobe Commerce Edition



SILVER

Home & Garden Top 50: Ecommerce Report

A benchmark report of the leading Home & Garden ecommerce retailers, built on Adobe Commerce (powered by Magento)

Discover how Home & Garden merchants are performing in speed, trust, navigation, mobile UX, payment & checkout, delivery & returns and more

Research was conducted in March 2022

If you wish to use any of the data contained in this report, please credit the agency by citing 'Fluid Commerce' with a link to www.fluidcommerce.co.uk.



A word from Fluid Commerce

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Welcome to the third edition of our annual Home & Garden Top 50 Ecommerce Report, a benchmark report analysing the sector's leading retailers built on Adobe Commerce (powered by Magento).

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 provide examples of ecommerce best practice, showcasing the brands that are performing at the top of their game.

Retailers were marked against the following themes:

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

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

Movers & Shakers

The data for last year's report was collected in February 2021, and the data for this report was gathered in March 2022. This gives us an accurate year-on-year view of what retailers have done over the last 12 months in order to improve their online stores.

Two retailers in particular have made dramatic improvements to their ecommerce offering: Primrose and Bradfords Building Supplies both shot up from the bottom in 2021 into this year's top ten.

Primrose: 56% in 2021, 78% in 2022

Klarna and Paypal as payment options

Bradfords Building Supplies: 55% in 2021, 77% in 2022

Now Pay Later option

These are just two examples of how simple onsite changes can make a huge difference to the user experience. In an ever-more competitive ecommerce space, it is essential that brands do all they can to strive for ecommerce excellence.

I hope you find the report useful as a guide to achieving ecommerce excellence. If you have any questions, my contact details are available on the back page of this report.



Adam Hindle Managing Director - Fluid Commerce

• Improvements include increasing site speed, introducing Live Chat, overhauling the checkout process and adding

• Improvements include introducing dynamic site search, adding an email pop up, offering more delivery options, overhauling the checkout process and introducing a Buy





A word from Avalara

In the ecommerce sphere, the world market is at your fingertips and the opportunities are endless.

However, opening up your business to international sales can be challenging from a tax perspective. Although your products can reach a broader audience, an expanded range of laws and regulations will apply to your goods, causing financial headaches for the unprepared.

Non-compliance is likely to result in your business incurring steep fines and penalties, which will undermine your hard-fought international growth.

The lingering impact of Brexit

The repercussions of Brexit continue to impact EU and UK retailers. Crossborder businesses have endured a steep learning curve, as they grapple with new regulations impacting distance selling thresholds, import VAT, and customs declarations.

But it's not all doom and gloom. According to the ONS (Office for National Statistics), the value of total export of goods from the UK to the EU rose by $\pounds 1$ bn (GBP) in December 2021.

Brexit clearly isn't spoiling the appetite for international trade. Just remember to stay vigilant of changing rules and regulations to remain tax compliant.

Adapting to the EU's IOSS Regulations

In July 2021, the EU rolled out the most significant changes to VAT in a generation: the introduction of the Import One-Stop Shop (IOSS).

IOSS is a simplified reporting model where you only need to register in one country for any sales you make to EU consumers in the 27 EU member states.

The scheme is helping to create a more efficient "green channel", with quick and easy customs clearance. In light of the Brexit complications, the IOSS scheme couldn't have come at a better time.

Swiftly moving goods with HS codes

The Harmonised System (HS) code is a six-digit number used to calculate tariff rates for all internationally traded products. It's essential to completing successful export transactions, as the system is in use around the world to agree product classifications.

Unfortunately, HS codes can be a minefield for ecommerce businesses to navigate. What's worse, the codes were updated in January 2022 with approximately 870 removed entirely, while 940 were added. As a result, businesses taking advantage of cross-border trade must review and change the affected HS codes or begin applying the new ones.

A parting word of advice

We live in an era where ecommerce provides easy access to the global market, so it makes sense for retailers to make the leap and test out new markets.

However, to make the process as smooth and successful as possible, tax can't be an afterthought. It needs to be a core consideration from the moment you launch your ambitious expansion plans.



Sacha Wilson Director - Avalara

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Methodology

Who was included and how we scored

Who we included

The Adobe Commerce merchants featured in this report were selected to ensure a fair, diverse and accurate representation of the Home & Garden sector in the UK.

We included brands from within the Home & Garden sub-sectors, including lighting, furniture and bathroom. There is a mixture of mid-scale and well-known retailers to ensure a clear picture of the industry.





How we scored

We evaluated brands across eight key ecommerce areas:



Within these, there were 60 specific elements that we looked at and 24 points up for grabs - go to the end of this report for the full breakdown of criteria.

New for 2022

This year, we introduced a few new criteria to assess retailers against.

These included:

- 'Add to Basket' option on the category page
- Video(s) on the product page
- O Personalisation whether or not the retailer used a solution such as Nosto, Dynamic Yield or Clerk.io
- O Pinterest whether or not the retailer has a Pinterest channel

The criteria have been added to ensure that we are accurately scoring for up-to-date ecommerce best practice.

As technology advances, so too does the standard for best-in-class ecommerce. Retailers must make sure to keep pace with development and customer expectations.

theckout & Payment



Benchmarking

How the Industry Compares



Benchmarking

The average score for all Home & Garden retailers featured in this report is **70%**

Broken down into sub-sectors, we can see that bedroom retailers were the most successful at ecommerce best practice.

E 73% Bedroom

Tools & Trade

J1 68% Walls, Floors & Doors

Furniture





Home & Garden

The Top 20 Retailers

Top 20 Retailers

		2022 Score %	2021 Score %			2022 Score %	2021 Score %
Soak&Sleep	soakandsleep.com	81	1 80	$\frac{FRENCH}{Est:2000} = \frac{DROOM}{Est}$	frenchbedroomcompany.co.uk	78	↑ 70
	iconiclights.co.uk	80	↑ 78	moda	modafurnishings.co.uk	77	₩ 78
BIG BATHROOM SHOP	bigbathroomshop.co.uk	80	₩84	linens limited	linenslimited.com	77	New Entry
[₽]PaintShed	thepaintshed.com	79	New Entry	Tile Giant	tilegiant.co.uk	77	个 75
	primrose.co.uk	78	个 59	ROCKETT ^{si} GEORGE	rockettstgeorge.co.uk	77	↑ 74



Top 20 Retailers

		2022 Score %	2021 Score %			2022 Score %	2021 Score %
	bradfords.co.uk	77	↑ 55	housing units the home department store	housingunits.co.uk	73	↑ 64
Simple Lighting	simplelighting.co.uk	77	↓ 78	MADE	made.com	73	1 71
been bozed	beanbagbazaar.co.uk	75	个 72	pimpernel.	pimpernelinternational.co.uk	73	个 70
(1) lampandlight.co.uk	lampandlight.co.uk	75	个 67	WOOD FLOOR WAREHOUSE	woodfloorwarehouse.co.uk	73	个 69
BIÖCX	woodblocx.co.uk	73	个 70	Cox & Cox	coxandcox.co.uk	72	个 67



The Lower Rankings

#21 - #50

Lower Rankings

	2022 Score %	2021 Score %	
Robert Dyas	72	70 🛧	Notcutts
Dip & Doze	72	67 🔨	White Stores
Dormeo	72	68 🛧	Logspan
ОКА	71	69 🗸	Charles Bentley
Rose & Grey	71	None Mover	Tom Dixon
Heals	70	66 个	TW Wholesale
Wood and Beyond	70	64 个	Little Greene
Easy Bathrooms	70	New Entry	bathshop321
Silentnight	69	74 🗸	Tap 'n Shower
Kilner	69	New Entry	BathroomsbyDesign
Dusk	69	77	Perch & Parrow
C.P Hart	68	64 🔨	The Conran Shop
Lighting Direct	68	69 🗸	Light Mirrors
Trading Depot	67	64 🔨	Craig & Rose
Cousins Furniture Stores	67	56 🛧	Love Sofas

2022 Score %	2021 Score %
67	69 🗸
67	New Entry
67	64
66	72 🗸
65	64
65	63 🛧
64	New Entry
63	64 🗸
63	New Entry
62	57 个
61	New Entry
60	63 🗸
57	60 🗸
52	51 个
50	New Entry

Above & Beyond

Who stood out

Above & Beyond

With all of the customisation available to Adobe Commerce users, it is impossible to capture everything in our scoring criteria. That's why, for the first time, we've introduced an 'Above & Beyond' section to celebrate those brands who have included an original or exciting element on their site, which might have otherwise gone overlooked.

Floor finder

Our first stand out retailer is **Wood Floor Warehouse** and its innovative Floor Finder. This questionnaire helps customers discover the best flooring for their style, room and colour preference.



Complimentary colours

and suggested paint colours on its product pages. A genuinely useful solution.





AR and 3D Planners

Moda Furnishings and BathroomsbyDesign offered augmented reality tools. These let shoppers see the products in the rooms or gardens they are intended for.

Moda Furnishings and Easy Bathrooms also offered 3D planners to help customers design the furniture or bathroom set of their dreams.



A different take on product recommendations, **Little Greene** provides shoppers with complimentary



Expand your growth further afield

Advice from Avalara

Expand your growth further afield

If your business has already maximised your local market, you may be thinking of expanding the brand internationally. With ecommerce, you're not bound by the physical limitations of brick-and-mortar. However, no matter where you do business, there are always tax implications you need to consider to remain compliant.



Filing taxes

Legislation determining where and when you need to register for tax purposes differs around the world, creating a compliance nightmare for ecommerce companies. For instance:

- O EU expansion: The Import One-Stop-Shop (IOSS) scheme simplifies VAT by allowing businesses to register in a single location for sales made to EU consumers; however you should consider that VAT rules differ depending on the set up of your business and whether the value of goods is in excess of €150
- O US expansion: Tax laws vary between states, counties and cities there are over 14,000 tax jurisdictions in the US. The concept of "nexus" also makes it difficult for ecommerce businesses to confidently <u>understand their tax requirements</u>

With the right set of digital solutions to handle your tax obligations, you can trade globally with ease.

Classifying items for cross-border shipping

Incorrectly classified products will be charged the highest possible customs duty - bad news for both you and your customers. <u>Applying the right Harmonisation Codes</u> (HS codes) is crucial.

HS Codes are used to classify physical goods in your customs paperwork. But with tens of thousands of codes in existence, classification can be overwhelming and easy to get wrong. To make things even more complicated, HS codes are updated every 5 years.

Automating taxes

By using a tool that calculates taxes and assigns HS codes automatically, your ecommerce business will be ready for international expansion. This will reduce the risk of fines or extra taxes and also create a transparent buying experience for your customers by providing an accurate landed price at checkout.

Go global with Avalara and Adobe Commerce

Avalara's AvaTax solution integrates easily into the Adobe Commerce platform, helping to take your ecommerce business global by managing your tax requirements. Together, they do the heavy lifting so you can focus on growing your business further afield.

Don't leave compliance up to chance. Automate your taxes with Avalara today.



Ecommerce Best Practice

Themes, Insights & Analysis



Speed: Top Brands

Runners Up*





*No brand achieved top marks in this category



FRENCH BEDROOM

– Est. 2006 –







C.P. HART



Speed

Time-poor customers need a fast site to make their purchases as quickly as possible. A site that takes too long to load will lead to frustration. Users will give up and shop elsewhere.

We measured retailers' site speed using Google PageSpeed Insights, which provides a score out of 100 for performance.

In general, Home & Garden retailers performed well for speed on desktop but mobile was a struggle for most.

- \odot The average score for desktop was ${\bf 59}$
- The average score for mobile speed was 25



Pimpernel was the fastest overall, with a near perfect score of **96** on desktop and an impressive mobile score of **62**

Key Takeaways: Speed



Average Mobile Speed

Fastest on Mobile
Pimpernel - 62
Lampandlight.co.uk - 58
Bean Bag Bazaar - 48
Wood Floor Warehouse - 45



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.



Average Desktop Speed

Fastest on Desktop

- O Pimpernel 96
- O C.P Hart **94**
- Tap 'n Shower **93**
- WoodBlocX 89



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Trust

The mark of a good website is its trust factor. Customers (and Google) look for and appreciate trust signals such as reviews, awards, finance options or money-back guarantees.

Trust signals give consumers confidence in a brand, and can convert shoppers from a casual browser into an active buyer.

This was understood by our Home & Garden retailers - over half (54%) won the maximum amount of points by including reassurance icons or messaging on the home page, plus reviews on the home page and product page.

Interestingly, four merchants didn't showcase reviews anywhere online, including OKA, The Conran Shop and Tom Dixon.

Given the high average price point of their products, it is possible reviews were deliberately left off to give a more 'luxe' feel to the store - a risky strategy reserved only for the brave.

Key Takeaways: Trust



80% reassurance messaging on homepage



Big Bathroom Shop excelled at trust. It showcases its 0% Finance offer, Klarna integration, trade discounts and free delivery option. It also exhibits its 'Excellent' reviews on its home page and product pages



72% reviews on homepage



66% reviews on product page





Navigation: Top Brands

Top Marks





Q Navigation

Breadcrumbs, filter, sort, search and live chat - there's a lot that merchants can do to help the user navigate around a website easily, and find what they're looking for quickly.

Great navigation has the power to drive conversion rates, reduce bounce rates and build customer loyalty - it's a hugely important part of the user experience.

Despite this, only two merchants got full marks for navigation: **Wood and Beyond** and **Charles Bentley**.

Merchants were let down by the sophistication of their site search, the lack of a live chat, not providing enough sort options, and not including breadcrumbs on product pages.



Wood and Beyond has a useful site search - showing products, popular searches, category pages, and customer service pages



Key Takeaways: Navigation

Key Takeaways: Navigation



76% offer dynamic search with product image suggestions



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86% offer dynamic search with product name suggestions

66% offer dynamic search with product name **and** product image suggestions

Offer Sort by Popularity/Bestselling - 50% Offer 'Add to Basket' on the category page - 40%

Live Chat

66% - offered a live chat function16% - used Zendesk14 different Live Chat solutions

Site Search Tech

Klevu was the most popular site search solution - **30%** of merchants use it on their websites



- 56% Unknown
- **6%** Other
- 4% Algolia
- 4% Salesfire







Product Page: Top Brands

Top Marks

moda

Runners Up

Soak&Sleep

FRENCH BEDROOM

—— Est. 2006 —



ROSE & GREY





Product Page

A successful product page will make a dramatic difference to conversion rates and average order values (AOV).

Merchants must offer a product page experience that lets shoppers visualise what the product would be like in real life. This means plenty of images and the ability to zoom in on the details. Videos are helpful sales tools - especially for higher-value items.

To increase AOV, retailers should also use the product page to recommend alternatives or additional items, preferably delivered by a personalisation solution such as Nosto or Clerks.io.

Finally, merchants should keep the shopper on the product page after they click 'add to cart'. This will encourage the user to keep browsing and - hopefully - add more items to the basket before checkout.



Moda Furnishings scored top marks. It offers videos, plenty of images, an impressive 3D planner and an augmented reality tool. It also included product info, delivery info, reviews, and a 'Recommended Products' carousel



Key Takeaways: Product Page

Personalisation Tech



76% provided product recommendations **36%** used a personalisation solution





92% let shoppers stay on page after adding to the cart 90% provided 'add to cart' messaging







Mobile UX: Top Brands

Top Marks

PaintShed

Soak&Sleep

pimpernel.





Luxury bedding for less





Mobile UX

In a mobile-first world, phones and tablets dominate how shoppers look for brands, research products, and make purchases. Offering a fast and intuitive mobile shopping experience is fundamental to a retailer's online success.

18% of our brands scored top marks for providing a slick mobile experience, with product-image zoom options, input-specific email keyboards and input-specific number keyboards.

Input-specific keyboards can help speed up the checkout process, great for reducing bounce rates. When it comes to zoom, retailers should look to include both double tap and pinching zoom options to allow shoppers to view products in a manner that is intuitive to them.



Soak&Sleep offers a number and email-input specific keyboard - perfect for a fast checkout. It is also fully mobile responsive, with both pinch and double-tap zoom available on product images

Key Takeaways: Mobile UX



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Offer 'pinch'

Offer 'pinch' and 'double tap' zoom

94% offer input-specific email keyboards **24%** offer input-specific number keyboards





Checkout & Payment: Top Brands

Runners Up*











*No brand achieved top marks in this category

Heckout & Payment

Once a shopper is ready to checkout, then it is up to the retailer to provide a streamlined, distraction-free, secure and fast process in order to reduce the risk of an abandoned basket.

While the checkout process went well for most merchants, many lost points by not offering a sufficient range of payment options that speed up and simplify the checkout process for users. These include Buy-Now-Pay-Later (BNPL) options such as Klarna or Clearpay, as well as Amazon Pay, Google Pay and Apple Pay.

Visible signposting of payment options in the global footer, homepage or product page is also a great way to build trust and increase the add-to-cart rate - something **86%** of our retailers understood.



Iconic Lights offers a masterclass in payment and checkout. It offers a large range of payment options, thoughtful add-ons and recommended products in the basket, plus a multi-page checkout with removed navigation



Key Takeaways: Checkout

Key Takeaways: Payment





98% Product imagery in basket 58% Product recommendations in basket

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Delivery & Returns: Top Brands

Top Marks

Runners Up





FRENCH BEDROOM _____ Est. 2006 _____

ROCKETT stGEORGE



BIG BATHROOM SHOP



Delivery & Returns

Having a robust delivery service is critical for boosting conversion rates and building customer loyalty. Shoppers want to know when their item will arrive and how much it will cost. They want the choice to speed up delivery and/or pay less for the service, and they don't want any nasty surprises at the checkout.

Transparency and communication are essential for this to happen. Home & Garden merchants performed well in this area - 100% had a dedicated delivery page, 92% had a dedicated returns page, and 82% displayed delivery information on the product page.

We also scored brands for the range of delivery options they offered including next day, named day and click & collect from store. Free delivery was the most widely-offered option (72%).



French Bedroom Company offers an exemplary delivery & returns service. It clearly displays delivery information on the product page, including a countdown for next day delivery. It also offers a white glove delivery service, free delivery, nominated-day delivery and collection from store

Key Takeaways: Delivery & Returns









Community: Top Brands

Top Marks

Soak&Sleep

Cox & Cox

SimpleLighting



& Community

Our top Community brands went above and beyond 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 performed well on social media, with Facebook and Instagram proving to be the two most popular channels, closely followed by Pinterest.

Email was also popular, with **90%** displaying a clear sign up form. However, only half **(50%)** used a pop up, asking shoppers to subscribe (usually in exchange for a discount code).

> Tweets & replies Media Cox & Cox @coxande

oxuk · 4d Set the table this Easter and enjoy a lor weekend with loved ones and plenty of 't forget you can save 25% on

> 01 Š

> > 11 Apr

Cox & Cox

Cox & Cox use a pop up to encourage newsletter subscribers. Its social media channels are regularly updated with content tailored to the specific channel. It also provides an inspirational blog for shoppers

Key Takeaways: Community



Email Marketing





Clear newsletter sign up form - 90% Email signup pop-up form - 50%



Scoring Criteria

The scoring system is based on Fluid Commerce's view of ecommerce best practice. Scores are weighted across 60 criteria with 24 points available. Retailers' final scores are converted to a percentage using the formula: =100/24*(total points).

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 for 75 - 100

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

Navigation

0.5 pts for live chat0.5 pts for filter on category page0.25 pts for 'add to basket' on category page

0.25 pts for breadcrumbs on category page0.25 pts for breadcrumbs on product page

0.5 pts for offering sort**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
suggesting products - text only
0.25 pts for dynamic search
suggesting products - text and
image

Product Page

0.5 pts for product image
0.5 pts for lifestyle product imagery
0.5 pts for multiple product images
0.5 pts for video(s)
0.5 pts for product recommendations

0.5 pts for product zoom on desktop**0.5** pts for controllable zoom on desktop

0.5 pts for staying on page after adding to cart**0.5** pts for add-to-cart message

0.5 pts for personalisation

Mobile

0.5 pts for mobile-responsive website

0.5 pts for zoom0.25 pts for Double Tap zoom0.25 pts for Pinch zoom

0.25 pts for email-input keyboard **0.25** pts for numeric keyboard

Delivery & Returns

0.25 pts for easy-to-find delivery information0.25 pts for easy-to find returns information0.5 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 from store or warehouse

Checkout & Payment

Cart 0.5 pts for product image 0.5 pts for product recommendations

Checkout

0.5 pts for product image
0.5 pts for a multi-page checkout
0.5 pts for removed navigation
0.5 pts for postcode lookup
0.5 pts for guest checkout

Payment

0.5 pts for visible payment icons before the cart/checkout
0.25 pts for Buy Now Pay Later
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 visible secure payment provider, e.g. Adyen, Stripe or Opayo

Community

0.25 pts for a clear email newsletter signup
0.25 pts for email newsletter pop up
0.25 pts for a blog or helpful guides section

0.25 pts for an active Facebook
0.25 pts for an active Twitter
0.25 pts for an active Linkedin
0.25 pts for an active Instagram
0.25 for Pinterest

'Active' = updated within the last two weeks



Avalara

Avalara helps businesses of all sizes get tax compliance right. Delivering cloudbased compliance solutions for various transactional taxes, including sales and use, VAT, GST, excise, communications, lodging, and other indirect tax types. Offering more than 1000 pre-built connectors into leading business applications, including Adobe Commerce.



in @Avalara-Europe



Fluid Commerce is a multi-award-winning ecommerce growth agency. Specialists in Adobe Commerce, PPC, Paid Social and Amazon Marketing, we offer ambitious brands the insight, skills and tech solutions required to become market leaders.

