Total retail's Top 100 Omnichannel Retailers

TotalRetail Radial



TOTAL RETAIL'S Top 100 Omnichannel Retailers

In its first ever ranking of 100 publicly traded retailers by their omnichannel capabilities, Total Retail, in conjunction with Radial, a leading omnichannel commerce technology and operations provider, offer a blueprint for brands on how to deliver the seamless, quick and enjoyable experiences that today's digitally savvy consumers demand.

This report serves as a supplement to Total Retail's annual Top 100 Fastest-Growing Retailers list, which ranks the fastest-growing public retailers based on year-over-year sales. We've taken that list of fastest-growing retailers and scored them based on the omnichannel experiences they offer to their customers.

The retailers were judged on the following seven omnichannel criteria — does it offer buy online, pick up in-store; does it offer the ability to search for in-store products on its website; does it offer a shared cart across sales channels (e.g., mobile to desktop); are loyalty points able to earned and redeemed across channels; are products able to be returned across channels (e.g., return online purchases in-store); does it offer customer service in more than one channel; and is product pricing consistent across channels. The research was compiled in the forth quarter of 2016 and the first quarter of 2017.

The retailers were scored across those seven criteria on a scale of zero to 100. The scoring for each criteria were weighted, from most valuable to least valuable (listed in order): buy online, pick up in-store; pricing consistency across channels; return products across channels; search for in-store products online; loyalty points earned and redeemed across channels; three or more channels for customer service; and shared cart across channels.

This report will enable retailers to benchmark themselves against their competition. In addition to ranking the top 100, we've broken out select product categories to see how direct competitors — think Home Depot vs. Lowe's — measure up against each other. Learn what your competitors' deficiencies are and where your opportunities may lie.

Consumers have raised the bar when it comes to the seamless omnichannel experiences they expect from retailers and brands. It's up to you to deliver on their demands. This report will help you do just that.



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RANK	RETAILERS	Buy online, pick up in-store	Search in–store products online	Shared Cart (mobile to laptop/ desktop)	Loyalty points earned/ redeemed across channels	Return products across channels	Three or more channels for customer service	Pricing Consistency Across Channels	Total Score	
1	DSW	1	1	1^{-1}	1	\rightarrow_1	1	7.5	100.00	
1	Ugg	1	1	1	1	1	1	7.5	100.00	-
1	Urban Outfitters	1	1	1	1	1	1	7.5	100.00	-
1	Zumiez	1	1	1	1	1	1	7.5	100.00	
2	The Finish Line	1	1	0	1	1	1	7.5	95.85	
3	Men's Wearhouse	0.5	1	1	1	1	1	7.5	95.39	
3	New York & Co.	0.5	1	1	1	1	1	7.5	95.39	
3	Nordstrom	0.5	1	1	1	1	1	7.5	95.39	-
4	Abercrombie & Fitch	1	1	1	0	1	1	7.5	94.01	
4	Tractor Supply Co.	1	1	1	0	1	1	7.5	94.01	
5	Ulta	0	1	1	1	1	1	7.5	90.78	
5	Foot Locker	0.5	1	1	1	1	0	7.5	90.78	
5	J.C. Penney	0.5	1	1	1	1	0	7.5	90.78	_
5	Macy's	0.5	1	1	1	1	0	7.5	90.78	_
6	Lids	0.5	1	1	0	1	1	7.5	89.40	_
6	Container Store	1	1	1	0	1	0	7.5	89.40	_
6	PetSmart	1	1	1	0	1	0	7.5	89.40	_
6	Target	1	1	1	0	1	0	7.5	89.40	_
7	GameStop	0.5	1	1	1	0.5	0	7.5	87.10	_
7	Guess Inc.	0.5	1	1	1	0.5	0	7.5	87.10	-
8	Sierra Trading Post	1	1	1	0	0	1	7.5	86.64	_
9	Neiman Marcus	0.5	1	1	0	0.5	1	7.5	85.71	-
10	Dick's Sporting Goods	1	1	0	0	1	0	7.5	85.25	_
11	Steve Madden	0	1	1	0	1	1	7.5	84.79	_
11	Kate Spade & Co.	0	1	1	0	1	1	7.5	84.79	-
11	Ann Taylor	0	1	1	0	1	1	7.5	84.79	-
12	American Eagle Outfitters	0	0	1	1	1	1	7.5	84.33	
12	Big Lots	0	0	1	1	1	1	7.5	84.33	_
12	Crocs	0	0	1	1	1	1	7.5	84.33	_
12	Express	0	0	1	1	1	1	7.5	84.33	-
12	Christopher & Banks	0	0	1	1	1	1	7.5	84.33	_
12	The Buckle	0	0	1	1	1	1	7.5	84.33	_
13	Johnston & Murphy	0	1	1	0	1	0	7.5	80.18	

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DANK		Buy online, pick up in-store	Search in-store products online	Shared Cart (mobile to laptop/ desktop)	Loyalty points earned/ redeemed across channels	Return products across channels	Three or more channels for customer service	Pricing Consistency Across Channels	Total Score
13	5 Michael Kors	0	1	1	0	1	0	7.5	80.18
14	Carter's	0	0	1	1	1	0	7.5	79.72
14	Columbia Sportswear	0	0	1	1	1	0	7.5	79.72
15	5 Vitamin Shoppe	1	1	1	1	1	1	5	79.26
15	5 Staples	1	1	1	1	1	1	5	79.26
16	5 Williams-Sonoma	0	0	1	0	1	1	7.5	78.34
16	5 Nike	0	0	1	0	1	1	7.5	78.34
16	5 Stein Mart	0	0	1	0	1	1	7.5	78.34
16	5 Tommy Bahama	0	0	1	0	1	1	7.5	78.34
16	5 Tommy Hilfiger	0	0	1	0	1	1	7.5	78.34
_17	Lumber Liquidators	0	1	0	0	0.5	1	7.5	76.96
_17	Rite Aid	0	0	1	1	0	1	7.5	76.96
18	B Henri Bendel	0	0	1	1	0.5	0	7.5	76.04
18	B Ralph Lauren	0	1	0	0	1	0	7.5	76.04
19	SKECHERS USA	0	0	0	1	1	0	7.5	75.58
20	Advance Auto Parts	1	1	1	1	1	0	5	74.65
20	D Best Buy	1	1	1	1	1	0	5	74.65
20	D Francesca's Holdings	0	0	1	0	0.5	1	7.5	74.65
20	GNC Holdings	0	0	1	0	0.5	1	7.5	74.65
20) Tumi	0	0	1	0	0.5	1	7.5	74.65
2	Victoria's Secret	0	0	0	0	1	1	7.5	74.19
2	Destination Maternity	0	0	0	0	1	1	7.5	74.19
2	2 AutoZone	0	0	1	0	1	0	7.5	73.73
2	2 TJ Maxx	0	0	1	0	1	0	7.5	73.73
2	2 Under Armour	0	0	1	0	1	0	7.5	73.73
2	3 Fossil	0	1	1	0	0	0	7.5	72.81
24	4 Journeys	0	1	0	0	0.5	0	7.5	72.35
2!	5 Jockey	0	0	1	0	0	1	7.5	70.97
2!	5 Bass	0	0	1	0	0	1	7.5	70.97
20	5 Chico's	0	1	1	1	1	1	5	70.05
20	6 Hanesbrands	0	0	1	0	0.5	0	7.5	70.05
2	7 Apple	1	1	1	0	1	0	5	68.66
2	7 Champs Sports	1	1	1	0	1	0	5	68.66

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	RANK	RETAILERS	Buy online, pick up in-store	Search in-store products online	Shared Cart (mobile to laptop/ desktop)	Loyalty points earned/ redeemed across channels	Return products across channels	Three or more channels for customer service	Pricing Consistency Across Channels	Total Score	
	28	Pacific Sunwear	1	0	1	1	1	0	5	68.20	
:	29	Wal-Mart	1	1	1	0	0.5	0	5	64.98	-
2	30	Bed Bath & Beyond	0	1	1	0	1	1	5	64.06	-
_₹	30	Lowe's	0.5	1	1	0	1	0	5	64.06	
	31	The Children's Place	0	0	1	1	1	1	5	63.59	_
_7	32	Dollar Tree	0	0	0	0	0	0	7.5	62.21	
_7	33	American Apparel	1	1	1	1	1	1	2.5	58.53	!
_7	33	Office Depot	1	1	1	1	1	1	2.5	58.53	_
_	33	The Home Depot	1	1	1	1	1	1	2.5	58.53	!
_7	34	Bath & Body Works	0	0	1	0	1	1	5	57.60	_
_7	35	Sears	1	1	1	1	1	0	2.5	53.92	_ /
_7	36	Cabela's	0	0	0	0	1	1	5	53.46	_ !
_7	37	bebe stores	0	0	1	0	1	0	5	53.00	_ !
_7	38	Restoration Hardware	0	0	1	1	0	0	5	51.61	_ !
	39	Aeropostale	0	0	0	0	1	0	5	48.85	_ !
	40	Pier I Imports	1	1	1	0	1	0	2.5	47.93	_
	41	Michaels	0	0.5	1	1	1	1	2.5	46.08	_
	42	Lilly Pulitzer	0	0	1	0	0	0	5	45.62	
	43	CVS Health	0	1	1	0	1	1	2.5	43.32	
	44	Calvin Klein	0	0	1	1	1	1	2.5	42.86	
	45	Barnes & Noble	0	0	1	0	1	1	2.5	36.87	
	46	Gap	0	0	1	1	0.5	0	2.5	34.56	
	47	Vera Bradley	0	0	0	0	1	1	2.5	32.72	
	48	lululemon athletica	0	0	1	0	0	1	2.5	29.49	
	49	Kohl's	0.5	1	1	1	1	0	0	28.57	
	49	Maidenform	0	0	1	0	0.5	0	2.5	28.57	
	50	The Limited	0	1	1	0	1	1	0	22.58	_
	51	Callaway Golf	0	0	1	1	0	1	0	14.75	_
	52	Perry Ellis	0	0	1	0	1	0	0	11.52	_
	53	Dockers	0	0	0	0	0	1	0	4.61	_
	54	HomeGoods	0	0	0	0	0	0	0	-	_
	54	Knoll	0	0	0	0	0	0	0	-	_
	54	Marshalls	0	0	0	0	0	0	0	-	
5	54	Ross Stores	0	0	0	0	0	0	0	-	

TOTAL RETAIL'S Top 100 Omnichannel Retailers

#1 (tied) **DSW**

The branded footwear and accessories retailer took the top spot in Total Retail's inaugural ranking of the Top 100 Omnichannel Retailers. DSW received the top possible score across the seven criteria — buy online, pick up in-store; search in-store products online; shared cart; loyalty points earned/redeemed across channels; return products across channels; three or more channels available for customer service; and pricing consistency across channels.



DSW leverages its 500-plus brick-and-mortar stores,

e-commerce site, and mobile properties (m.dot site and app) to provide a seamless browsing and buying experience for its customers. To help it accomplish that goal, DSW recently upgraded its e-commerce platform to unleash powerful capabilities in search and personalization. Furthermore, DSW has implemented buy online, pick up in-store; ship-fromstore capability that has transformed its stores into fulfillment centers with significant proximity to millions of its loyalty program customers; and launched a new in-store mobile application, which enables customers to view redeemable loyalty points, wish lists and personalized offers, as well as check out quickly at any point within the store.

"By making product, information and inventory accessible at all times, mobile technology is transforming the customer journey to one that moves seamlessly between digital and physical."

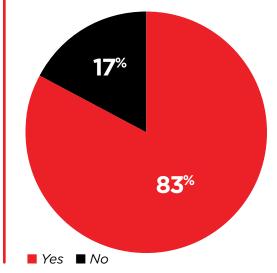
"We're always working to stay ahead of our evolving customer," says Brian Seewald, vice president, digital at DSW. "By making product, information and inventory accessible at all times, mobile technology is transforming the customer journey to one that moves seamlessly between digital and physical.

"We don't have just stores, we have over 500 'warehouses' that we can use to get product in front of our customer. We see this as a competitive advantage that will ultimately allow us to provide our customer with immediate access to our assortment across our entire network. Combined with a newly redesigned digital experience set to launch early this year, DSW will provide a powerful retail experience for today's digital customer."

FOOTWEAR

- 1 DSW
- 1 Ugg
- 2 The Finish Line
- **5** Foot Locker
- 1 Steve Madden
- 12 Crocs
- **13** Johnston & Murphy
- 16 Nike
- **19 SKECHERS USA**
- 24 Journeys
- 25 Bass

SHARED CART Across All Platforms



TOTAL RETAIL'S
Top 100 Omnichannel Retailers



#1 (tied) UGG

A division of Deckers Brands, UGG is a footwear brand that sells its products through company-owned brick-and-mortar stores, wholesale retail partners, an e-commerce site,

and a mobile app. With these multiple touchpoints available to its customers, UGG has made a seamless shopping experience across all channels a priority — as evidenced by its top ranking of 100 omnichannel retailers.

UGG received top scores for buy online, pick up in-store; search instore products online; shared cart; loyalty points earned/redeemed across channels; return products across channels; more than one channel available for customer service; and pricing consistency across channels.

Omnichannel initiatives for UGG have included "Infinite UGG," which enables in-store sales associates to help customers view and purchase products not found in stores, as well as "Magic Carpet" RFID technology in select test stores. When customers try on shoes and step onto a carpet in front of a large interactive display, RFID communications render product details for the item on in-store touchscreen monitors. The customer can enter their phone number to receive a text with a URL to a product page on UGG's mobile site.

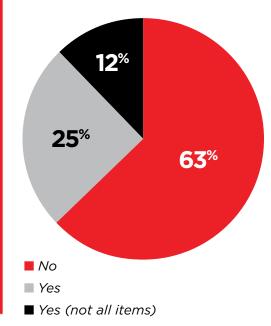
"Before our organizational change, we spoke to the customer by channel, with people, processes and technology aligned relative to that channel," said John Kalinich, senior vice president, omnichannel operations and e-commerce for Deckers Brands. "However, there's no difference between a retail customer and an e-commerce customer. It's the same customer."

"...there's no difference between a retail customer and an e-commerce customer. It's the same customer."

FURNITURE/ HOME DÉCOR

- 6 Container Store
- 16 Williams-Sonoma
- 30 Bed Bath & Beyond
- **38** Restoration Hardware
- 40 Pier I Imports
- 54 Home Goods
- 54 Knoll

RETAILERS WITH In-Store Pickup



HOME IMPROVEMENT

- **4** Tractor Supply Co.
- **17** Lumber Liquidators
- 30 Lowe's
- **33** The Home Depot



#1 (tied) Urban Outfitters

Tied for the No. 1 spot in our Top 100 ranking is millennial and Gen Z favorite Urban Outfitters. The apparel retailer received a score of 100 points across the seven criteria — buy online, pick up in-store; search in-store products online; shared cart; loyalty points earned/ redeemed across channels; return products across channels; three or more channels available for customer service; and pricing consistency across channels

Philadelphia-based Urban Outfitters interacts with its customers through multiple channels, including its e-commerce site, mobile site and app, 240 brick-andmortar locations throughout the United States, social media, email, among others. In the last year, Urban Outfitters has invested in omnichannel initiatives such as buy online, pick up in-store as well as ship from store.

"In order to drive additional direct and omnichannel sales, we will continue to make investments in technology, marketing and new infrastructure."

"In order to drive additional direct and omnichannel sales, we will continue to make investments in technology, marketing and new infrastructure," Richard Hayne, CEO of Urban Outfitters, Inc., said in a fourth quarter earnings call. "We're improving our functionality around checkout, payments, search, inventory visibility and speed on all of our brands' web platforms."

Urban Outfitters goal is to offer its customers experiences rather than just a trip to the store. Over the last few years, the company has focused on incorporating more homeware, beauty and music into its product assortment, helping to reach its Gen Z customers and create more of a lifestyle brand, and less of a dependence on apparel.



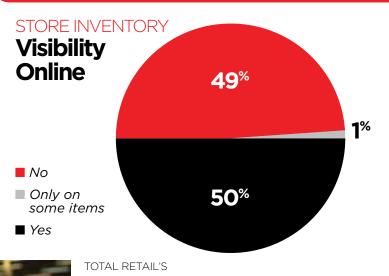
APPAREL AND ACCESSORIES

- **1** Urban Outfitters
- 1 Zumiez
- 3 Men's Wearhouse
- 3 New York & Co.
- 4 Abercrombie & Fitch
- 6 Lids
- 7 Guess Inc.
- 8 Sierra Trading Post
- 11 Kate Spade & Co.
- 11 Ann Taylor
- 12 Christopher & Banks
- **12** American Eagle Outfitters
- 12 Express
- 12 The Buckle
- 13 Michael Kors
- 14 Carter's
- 14 Columbia Sportswear
- 16 Tommy Bahama
- 16 Tommy Hilfiger
- 18 Ralph Lauren
- 20 Francesca's Holdings

Victoria's Secret
 Under Armour

21 Destination Maternity

- 23 Fossil
- 25 Jockev
- 26 Chico's
- 26 Hanesbrands
- 28 Pacific Sunwear
- **31** The Children's Place
- **33** American Apparel
- **37** bebe stores
- **39** Aeropostale
- 42 Lilly Pulitzer
- 44 Calvin Klein
- 46 Gap
- 47 Vera Bradley
- 48 Iululemon athletica
- **49 Maidenform**
- 50 The Limited
- 52 Perry Ellis
- 53 Dockers



Top 100 Omnichannel Retailers

#1 (tied) Zumiez

Coming in first place on Total Retail's inaugural ranking of the Top 100 Omnichannel Retailers is Zumiez, the clothing, footwear, accessories and hard goods retailer for skate and snow enthusiasts. Zumiez received a maximum score of 100 points across the seven criteria — buy online, pick up in-store; search in-store products online; shared cart; loyalty points earned/redeemed across channels; return products across channels; three or more channels available for customer service; and pricing consistency across channels.

Last year, Zumiez implemented a new platform that provided it with a point-of-sale experience that includes full omnichannel capabilities. Zumiez turned its over 500-plus retail locations in the U.S. into fulfillment centers as well, giving consumers flexible paths to purchase.

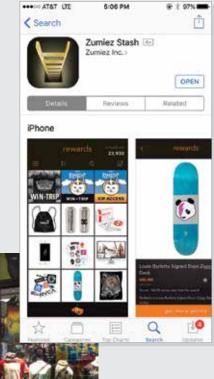
"While our primary objective in this project is to deliver a seamless omnichannel customer experience, we also wanted to significantly improve operational performance," said Troy Brown, executive vice president of e-commerce and omnichannel at Zumiez.

Zumiez's customers are now able to reserve/buy online and pick up in-store same day; ship from any store to any location; and order online from the store. As you can see, stores are an essential part of Zumiez's omnichannel experience.

Another essential part of the omnichannel experience for Zumiez is its loyalty program, Zumiez Stash. Shoppers can redeem points online and in-store, and there's even a Zumiez Stash app that keeps track of points for its loyalty members.

The lifestyle brand also offers customer service across three different channels — phone, mail and email.

zumez



"While our primary objective in this project is to deliver a seamless omnichannel customer experience, we also wanted to significantly improve operational performance."

DEPARTMENT STORES

- 3 Nordstrom
 5 Macy's
 5 J.C. Penney
 9 Neiman Marcus
 16 Stein Mart
 22 TJ Maxx
 35 Sears
 49 Kohl's
 54 Marshalls
- 54 Ross Stores

SPORTING GOODS

- 10 Dick's Sporting Goods
- 27 Champs Sports
- 36 Cabela's
- 51 Callaway Golf

