TOTAL RETAIL'S
Top 100
Omnichannel
Retailers

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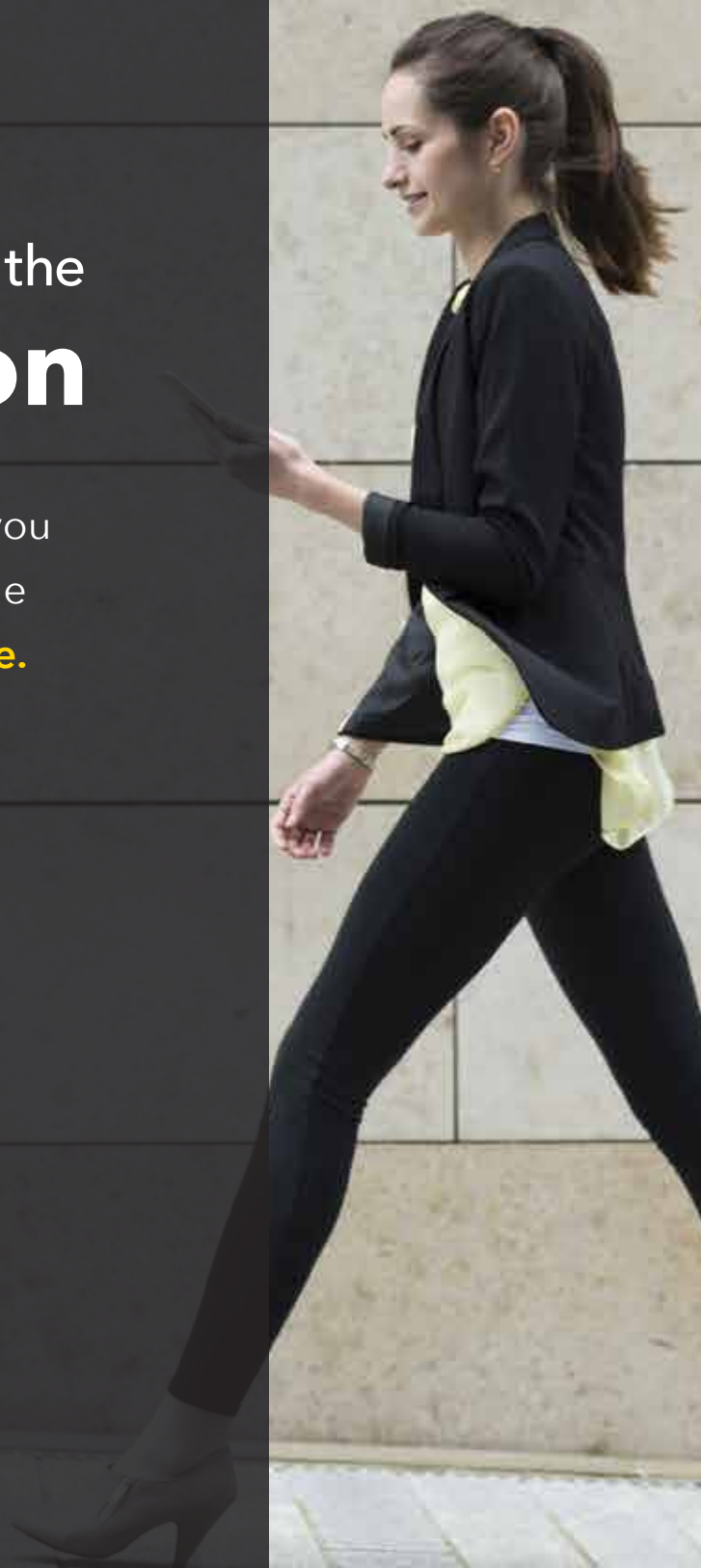
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In its first ever ranking of 100 publicly traded retailers by their omnichannel capabilities, Total Retail, in conjunction with Radial, a leading omnichannel commerce technology and operations provider, offer a blueprint for brands on how to deliver 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.

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	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

TOTAL RETAIL'S
Top 100 Omnichannel Retailers

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
13	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	Vitamin Shoppe	1	1	1	1	1	1	5	79.26
15	Staples	1	1	1	1	1	1	5	79.26
16	Williams-Sonoma	0	0	1	0	1	1	7.5	78.34
16	Nike	0	0	1	0	1	1	7.5	78.34
16	Stein Mart	0	0	1	0	1	1	7.5	78.34
16	Tommy Bahama	0	0	1	0	1	1	7.5	78.34
16	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	Henri Bendel	0	0	1	1	0.5	0	7.5	76.04
18	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	Best Buy	1	1	1	1	1	0	5	74.65
20	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
21	Victoria's Secret	0	0	0	0	1	1	7.5	74.19
21	Destination Maternity	0	0	0	0	1	1	7.5	74.19
22	AutoZone	0	0	1	0	1	0	7.5	73.73
22	TJ Maxx	0	0	1	0	1	0	7.5	73.73
22	Under Armour	0	0	1	0	1	0	7.5	73.73
23	Fossil	0	1	1	0	0	0	7.5	72.81
24	Journeys	0	1	0	0	0.5	0	7.5	72.35
25	Jockey	0	0	1	0	0	1	7.5	70.97
25	Bass	0	0	1	0	0	1	7.5	70.97
26	Chico's	0	1	1	1	1	1	5	70.05
26	Hanesbrands	0	0	1	0	0.5	0	7.5	70.05
27	Apple	1	1	1	0	1	0	5	68.66
27	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
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
32	Dollar Tree	0	0	0	0	0	0	7.5	62.21
33	American Apparel	1	1	1	1	1	1	2.5	58.53
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
34	Bath & Body Works	0	0	1	0	1	1	5	57.60
35	Sears	1	1	1	1	1	0	2.5	53.92
36	Cabela's	0	0	0	0	1	1	5	53.46
37	bebe stores	0	0	1	0	1	0	5	53.00
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 1 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	-
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-from-store 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**
- **11** **Steve Madden**
- **12** **Crocs**
- **13** **Johnston & Murphy**
- **16** **Nike**
- **19** **SKECHERS USA**
- **24** **Journeys**
- **25** **Bass**

SHARED CART
Across All Platforms

17%

83%

■ *Yes* ■ *No*

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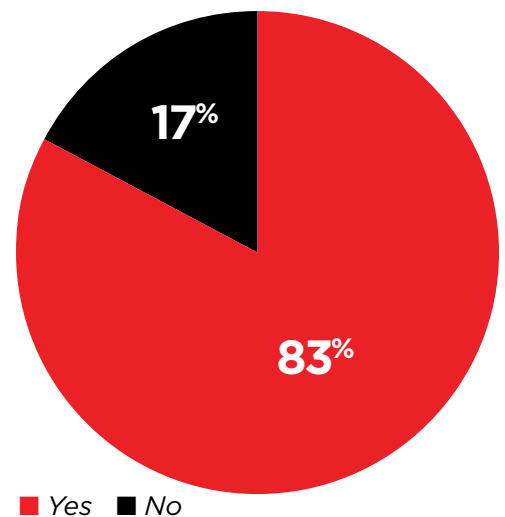
#1 *(tied)*
UGG

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 in-store 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

- **No** — 63%
- **Yes** — 25%
- **Yes (not all items)** — 12%
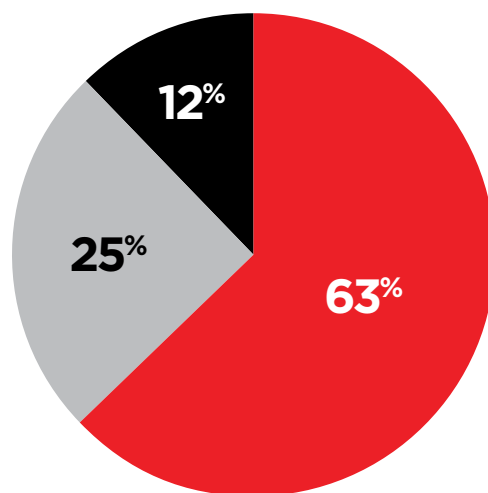
HOME IMPROVEMENT

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

TOTAL RETAIL'S
Top 100 Omnichannel Retailers

#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-and-mortar 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

#	Retailer	#	Retailer
1	Urban Outfitters	21	Destination Maternity
1	Zumiez	21	Victoria's Secret
3	Men's Wearhouse	22	Under Armour
3	New York & Co.	23	Fossil
4	Abercrombie & Fitch	25	Jockey
6	Lids	26	Chico's
7	Guess Inc.	26	Hanesbrands
8	Sierra Trading Post	28	Pacific Sunwear
11	Kate Spade & Co.	31	The Children's Place
11	Ann Taylor	33	American Apparel
12	Christopher & Banks	37	bebe stores
12	American Eagle Outfitters	39	Aeropostale
12	Express	42	Lilly Pulitzer
12	The Buckle	44	Calvin Klein
13	Michael Kors	46	Gap
14	Carter's	47	Vera Bradley
14	Columbia Sportswear	48	lululemon athletica
16	Tommy Bahama	49	Maidenform
16	Tommy Hilfiger	50	The Limited
18	Ralph Lauren	52	Perry Ellis
20	Francesca's Holdings	53	Dockers

STORE INVENTORY
Visibility Online

- ■ *No* — 49%
- ■ *Only on some items* — 1%
- ■ *Yes* — 50%

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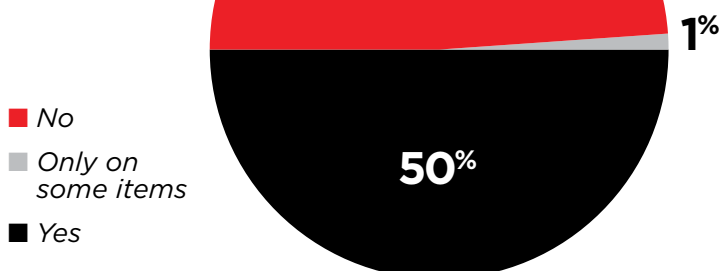
#1 *(tied)* Zumiez

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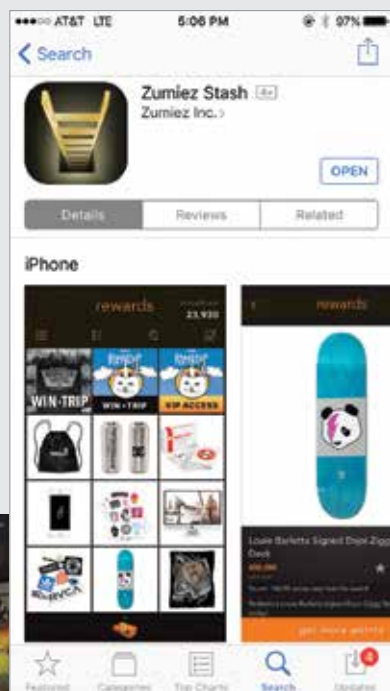
> "While our primary objective in this project is to deliver a seamless omnichannel customer experience, we also wanted to significantly improve operational performance."

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

WHO WE ARE

TotalRetail

Total Retail is the go-to source for retail executives looking for the latest news and analysis on the retail industry. Featuring a quarterly print magazine, daily e-newsletter (Total Retail Report), daily-updated website, podcast channel, virtual and in-person events, and research reports, *Total Retail* offers retail executives the information they need to do their jobs more effectively and grow their professional careers.

Radial

Radial is the leader in omnichannel commerce technology and operations, enabling brands and retailers to profitably exceed retail customer expectations. Radial's technical, powerful omnichannel solutions connect supply and demand through efficient fulfillment and transportation options, intelligent fraud, payments, and tax systems and personalized customer care services.

Hundreds of retailers and brands confidently partner with Radial to simplify their post-click commerce and improve their customer experiences. Radial brings flexibility and scalability to their supply chains and optimizes how, when and where orders go from desire to delivery. Learn how we work with you at www.radial.com.

NAPCO MEDIA

NAPCO Media. Total Retail's parent company, is a leading B-to-B media company specializing in creating community through content via integrated media programs, video services, marketing services, events and event management, custom content, eLearning and market research. NAPCO Media has rapidly expanded its portfolio to include NAPCO Video Services, NAPCO Events, NAPCO Marketing Services and NAPCO Research.

4 Ways Retailers Can Make Omnichannel More Profitable

Stefan Weitz
Chief Product and Strategy Officer & GM, Payments, Tax & Fraud

With so many options available at their fingertips, consumers' expectations have never been higher while their brand loyalty has never been lower. They want to be able to find and purchase products anywhere, anytime, on any device—and be able to receive and return those products anywhere—quickly, conveniently, and affordably. If they don't get what they want, consumers will quickly take their business to a competitor.

Although many retailers are getting better at omnichannel, many more are struggling to make it profitable. As a result, more retailers are looking to up their game and develop solutions to compete or risk going out of business. Amazon has widely been credited for setting a high bar for the industry, and now we're seeing innovations in omnichannel technology and operations that are enabling retailers to not only compete with the eCommerce giant, but to do so without sacrificing their margins.

To drive sales and win your customers' loyalty, you can't just optimize one part of your business and expect to compete. There are many pieces to the puzzle, and all of them must work together to keep up with consumer expectations. The complexity of stitching together these various systems is what is causing many retailers to struggle today, yet it's what you need to focus on if you expect to be around to fulfill your customers' expectations tomorrow.

Let's explore four things almost any retailer can do to make omnichannel more profitable.

1. Use a centralized order management system (OMS)

Utilizing a scalable, centralized OMS is vital in our omnichannel retail world where customers simultaneously engage with both physical and digital channels. It is critical for providing both retailers and their customers with inventory visibility so they can see real-time information about the available inventory across the enterprise, including options for when, where, and how orders can most profitably be fulfilled.

Best-in-class OMS systems seamlessly orchestrate the transaction from the moment a customer clicks the "buy" button to the moment she receives her order at her designated location, making sure her payment is securely processed and that her order is fulfilled from the optimal location. Ultimately, the job of a centralized OMS is to ensure that a customer is able to buy and receive her order in the exact way she wants it while ensuring that retailers make the most money possible on the order.

2. Don't overlook customer care before, during, or after the sale

Developing a single view of the customer enables store associates to easily access a customer's shopping preferences, buying behaviors, and transaction history to provide a more personalized experience. By arming associates with tools and information that can improve a customer's in-store experience—and giving them the ability to sell inventory from anywhere in the network—you have a much greater chance of closing the sale and capitalizing on upsell/cross-sell opportunities.

More traditional customer service—the kind that happens in the call center—is also essential. Whether customers contact you via phone, live chat, email, online self-service, or social media, their customer service experience should be seamless. Every interaction should feel like the continuation of a previous conversation, since agents have access to a customer's communication history across channels. With their purchasing preferences and buying habits at their fingertips, agents are also in a perfect position to increase sales by recommending products to customers as they're assisting them.

3. Check your freight rates and negotiate with your carriers

As the major carriers continue to compete for business, it's a good time to negotiate with your carriers to improve your rates. Although shipping costs continue to rise, you still wield a certain amount of power at the negotiating table and can significantly lower your rates by focusing on a variety of areas, such as making sure your carrier agreement addresses your specific needs, leveraging volume, and by encouraging the top carriers to compete for your business. To truly get the best rates, however, successful retailers choose to partner with a provider who already has the scale, volume, and favorable contracts in place to handle the entire shipping process for you.

4. Understand how fraud can affect your bottom line

With card-not-present fraud losses expected to reach $6 billion by 2018, it's no wonder that fraud tops the list of omnichannel retailers' biggest fears, and it's why integrating a robust fraud management capability into your payments solution is so important. By partnering with the right eCommerce fraud management provider, you can dramatically increase approval rates, decrease manual review rates, and systematically detect and prevent fraud through sophisticated processes that enable you to provide frictionless shopping experiences. The result is a happy customer that is ready to spend more money, a frustrated thief that moves along to another target, and greater profits for your business.

Are You Ready?

We're at a crossroads in commerce. The retailers who take the right path will win market share, and the rest, quite frankly, will likely not be here in three years. If you want to be one of the retailers that prosper, now's the time to start implementing omnichannel solutions that will enable you to attract, convert, and consistently delight consumers. Learn more about omnichannel technology and operations that can enable you to increase profits and improve your customer experience at **www.radial.com**.