

STILL WAITING FOR AN OMNICHANNEL HOME RUN!

THE OMNICHANNEL RETAIL INDEX: HOW DO YOU STACK UP?

November 2, 2017



FitForCommerce

is a specialized consultancy founded to help online businesses accelerate growth.

Trusted advisor to hundreds of global companies.

Digital Diligence™

is a philosophy and our methodology based on an investment and due diligence mindset for decision-making and execution to ensure success.

We are the help.



Curated digital innovation tracking and applied market advice to businesses in a CDO-on-demand service.



Benchmarking of Top 120 Retailers for Omnichannel (Web, Mobile, In-Store) innovation.



Some of our CLIENTS

Michaels
Where Creativity Happens



Dior



PLUSHBEDS
American Made Luxury

ModCloth

Brooks Brothers

DAVIDsTEA

Yoda's

LVMH
LOUIS VUITTON • HERMÈS • MONDRIAN • BVLGARI

L'ORÉAL

IMPROVEMENTS[®]
An H&M Company



GUCCI

BED BATH &
BEYOND



FRONTGATE



BARNES & NOBLE



SHADES OF LIGHT

BALLARD
DESIGNS

Toys R Us

J. CREW

Calvin Klein

BARNEYS
NEW YORK

belk

STEVE MADDEN

Harry & David
Happiness Delivered™



RALPH LAUREN



COLE HAAN



Sur la Table

Do it Best Corp.

charlotte
russe



CVS
pharmacy

VICTORIA'S
SECRET

PERRY ELLIS

StanleyBlack&Decker

fortunoff



BAZAAR

Home Wet Bar.com
DARE TO BE AWESOME



pure decor



Stein Mart



Vera Bradley

GRACIOUS HOME
NEW YORK

Swavelle / Mill Creek

NASTY GAL



Allen Edmonds
AN AMERICAN ORIGINAL

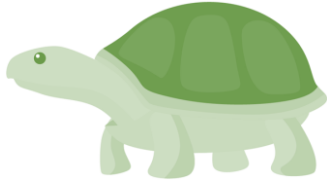
TALBOTS



When it comes to Omnichannel Retail, your company approach is most like ...



A.



B.



C.



D.



E.

Text "FFC817" to 22333 to join, then A B C D E to vote

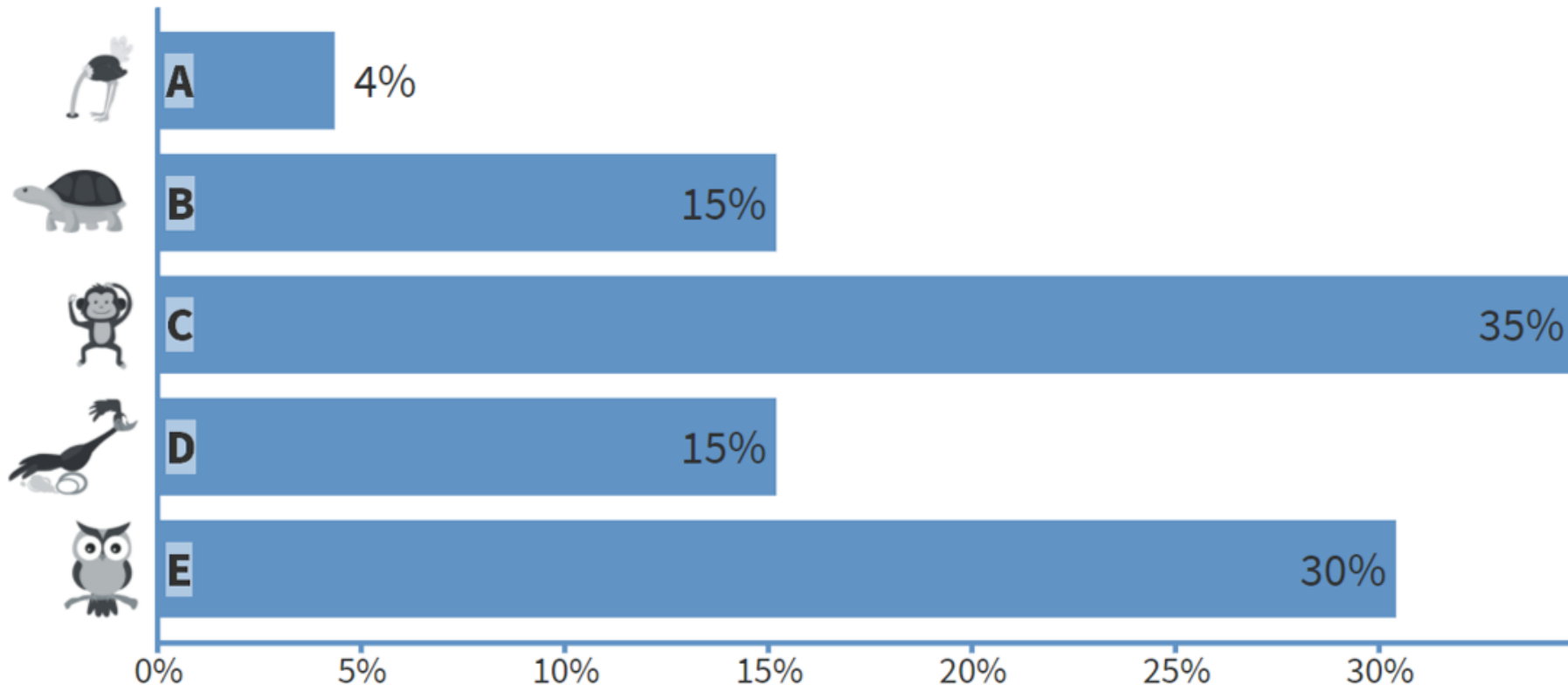
When it comes to Omnichannel Retail, your company approach is most like...



Respond at **PollEv.com/ffc817**



Text **FFC817** to **22333** once to join, then **A, B, C, D, or E**

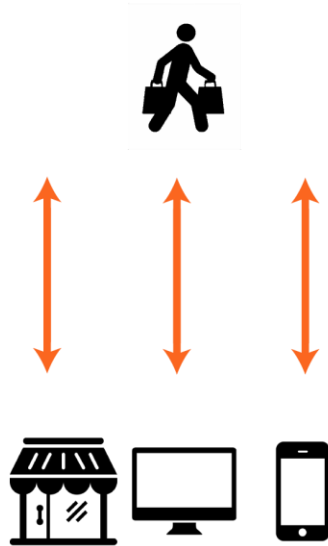


TODAY'S RETAIL REALITY

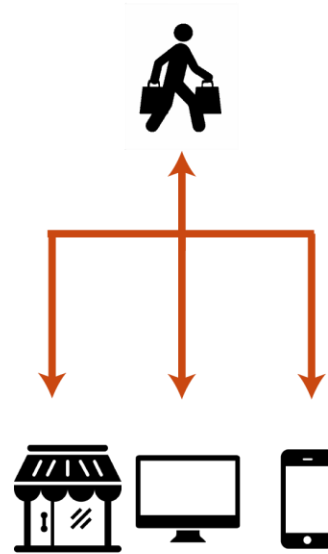
Single Channel



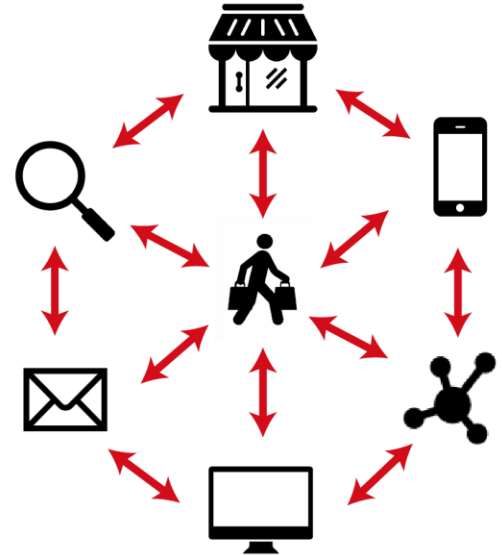
Multi Channel



Cross Channel



Omni Channel



Omnichannel leaders must excel across all channels and customer touchpoints



OMNICHANNEL SHOPPERS ARE 3-4X MORE VALUABLE



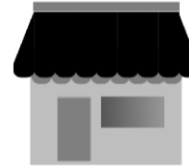
59% of retailers say omnichannel customers are more profitable



67% of shoppers complement product research via smartphones with in-store visits



Spend **4%** more on every shopping occasion in the store and **10%** more online



Shoppers who use 4+ channels spend **9%** more in the store

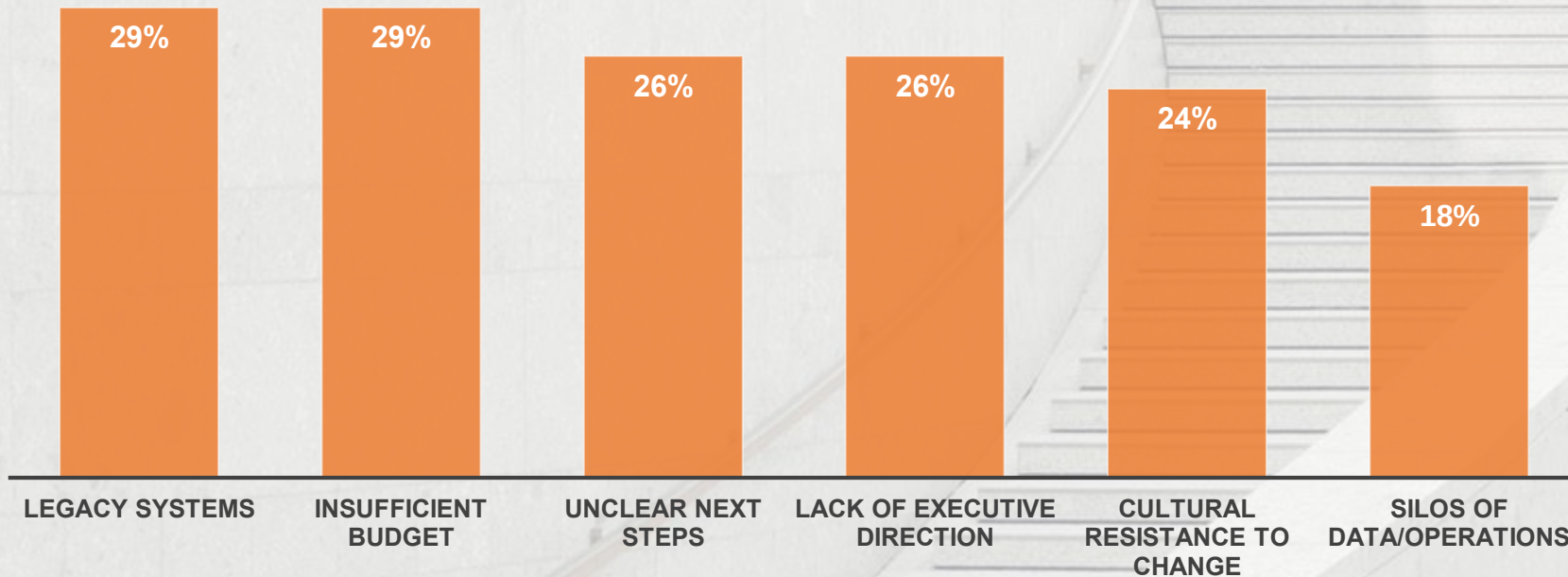


More loyal and likely to recommend brand/retailer to family and friends



Prior online research leads to **13%** greater in-store spending

WHAT'S HOLDING RETAILERS BACK?



**Yesterday's Innovations became today's
Best Practices.**

**Today's Best Practices will become
tomorrow's Table Stakes.**



OMNICHANNEL RETAIL INDEX

Fourth Omnichannel Channel Retail Index



120
BRANDS & RETAILERS



20
RETAIL VERTICALS



200+
WEB/MOBILE/IN-STORE CRITERIA

* Online Only Assessments

APPAREL / FASHION

Abercrombie & Fitch
American Eagle
Ann Taylor
Banana Republic
Bonobos
Brooks Brothers
Burberry
Calvin Klein*
Coach
Forever 21
Gap
H&M
J. Crew
Kate Spade
Kenneth Cole*
L.L. Bean
Lands' End
Lane Bryant
Michael Kors
ModCloth*
Net-a-Porter*
Ralph Lauren
Rebecca Minkoff
Topshop
Tory Burch
Uniqlo
Urban Outfitters
Victoria's Secret

ACCESSORIES

Charming Charlie
Claire's
eBags*
Sunglass Hut
Warby Parker
Louis Vuitton

ATHLETIC

Adidas America
Lululemon
Nike
Under Armour

BEAUTY

Bare Escentuals
M.A.C.
Sephora
ULTA Beauty

BOOKS, MUSIC, MEDIA

Barnes and Noble
GameStop

ELECTRONICS / COMP.

Apple
Best Buy
Samsung*

DEPARTMENT STORE

Barneys
Bloomingdale's
Dillard's
J. C. Penney
Kohl's
Lord & Taylor
Macy's
Neiman Marcus
Nordstrom
Saks
Sears
Target
Walmart
TJ Maxx

FOOD / GIFT

1800 Flowers
FTD*
Godiva
Harry & David*
Total Wine and More
Wine Country Gift

FOOTWEAR

Aldo
Cole Haan
Crocs
DSW Shoes
Footlocker
Nine West*
Puma
Timberland
Zappos*

HOBBY

Etsy*
Michaels
Party City

HOME

Bed Bath & Beyond
Container Store
Crate & Barrel
Ikea

OFFICE

Office Depot
Staples

PET

Petco
PetSmart

PHARMACY

Walgreens

Marketplaces

Amazon*
eBay*
Overstock*
Newegg*
Rakuten*

"BEST PRACTICES" CRITERIA EXAMPLES



- Site-wide Elements
- Navigation
- Category & List Pages
- Product Detail Pages
- Cart & Checkout
- Accounts & Preferences
- Customer Service
- Gift Cards

EXAMPLES

- Social media integration
- Contextual help - live chat, FAQs, confirming add to cart



- Site-wide Elements
- Multi-Channel
- Product Detail Pages
- Checkout

EXAMPLES

- Mobile optimized site
- Saved cart between mobile and web
- Pre-populated nearby stores
- Click to Call



- Services
- Signage
- Shopping Tools
- Purchase Experience
- Return Experience
- Collateral
- Mobile

EXAMPLES

- Buy online, pick up in-store
- Buy online, return in-store
- Endless aisle

OMNICHANNEL

**RETAILERS ARE
CATCHING ON...**

**BUT THERE IS
STILL SO MUCH
WORK TO DO!**

Adoption of Omnichannel Best Practices

- Top 10 of 120 leading retailers score between **68% and 78%**
- Average of all retailers increased from **56% in 2016 to 64% in 2017**
- *Home retailers score **68%** in adoption of omnichannel*

THE OMNICHANNEL RETAIL INDEX LEADERS

L.L.Bean



sears

★ macy's

Saks Fifth Avenue

Crate&Barrel

NORDSTROM



BED BATH &
BEYOND®

carter's®

WHO WINS IN THE HOME CATEGORY?

Crate&Barrel

BED BATH &
BEYOND

The Container Store

Pier1 imports

WILLIAMS
SONOMA

CALIFORNIA

Home retailers in the overall top 30 of the Omnichannel Retail Index

WHAT ARE THEY DOING RIGHT?

	RANK	OVERALL	WEB	MOBILE	STORE	CROSS-CHANNEL
Crate&Barrel	5	74%	71%	79%	67%	100%
BED BATH & BEYOND®	6	73%	73%	79%	50%	89%
The Container Store®	15	67%	62%	79%	75%	78%
Pier1 imports®	21	64%	60%	93%	58%	67%
WILLIAMS SONOMA CALIFORNIA	28	62%	60%	79%	75%	33%

WHO FALLS SHORT?

	RANK	OVERALL	WEB	MOBILE	STORE	CROSS-CHANNEL
Sur la table	64	53%	56%	57%	33%	44%
	77	47%	44%	57%	50%	56%
RH	94	39%	46%	36%	17%	22%

Home retailers with rankings 64 and below

WHO WINS IN DEPARTMENT STORES?

Saks Fifth Avenue

sears

NORDSTROM

bloomingdale's

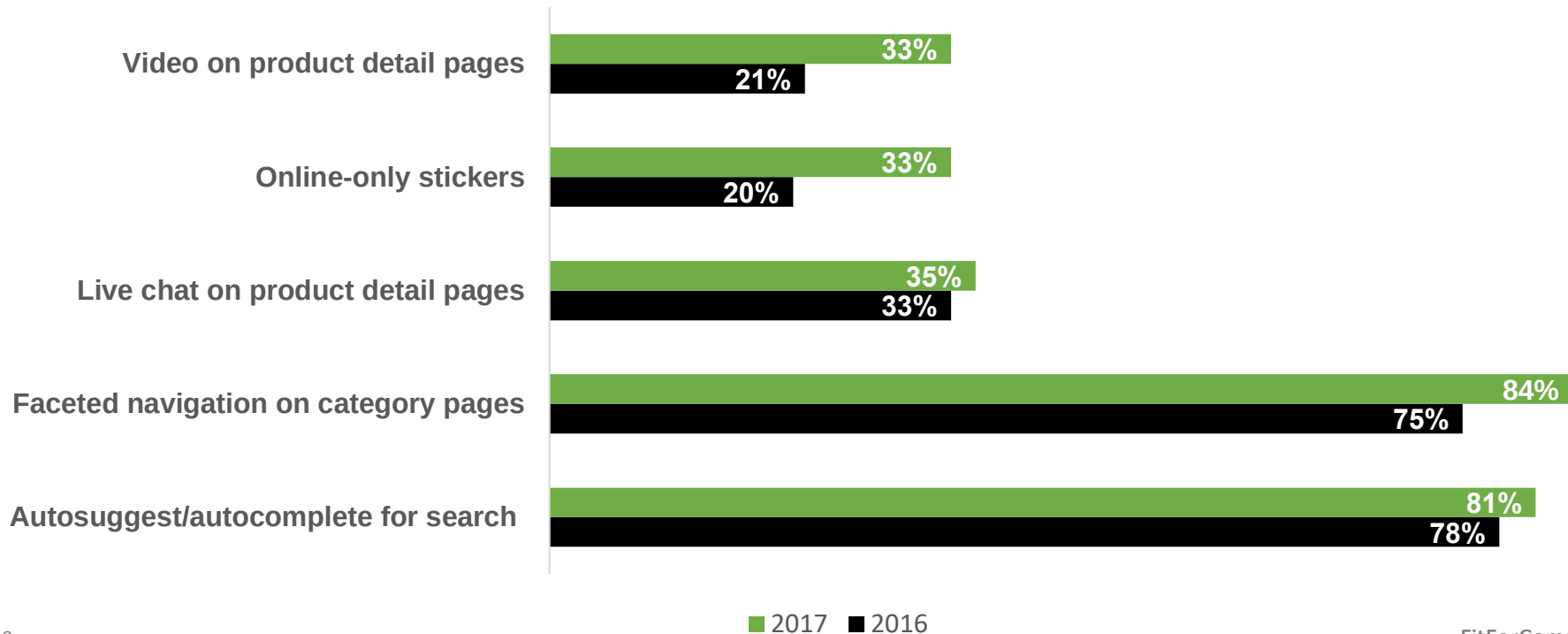
★ macy's

**WHAT CAN WE LEARN
FROM THE INDEX?**



ONLINE BEST PRACTICES ARE FAR FROM TABLE STAKES...BUT THEY SHOULD BE

Sampling adoption of online best practices



#1
Online

L.L.Bean

Saks Fifth Avenue

Faceted Navigation



Reviews & Ratings



Color Swatches



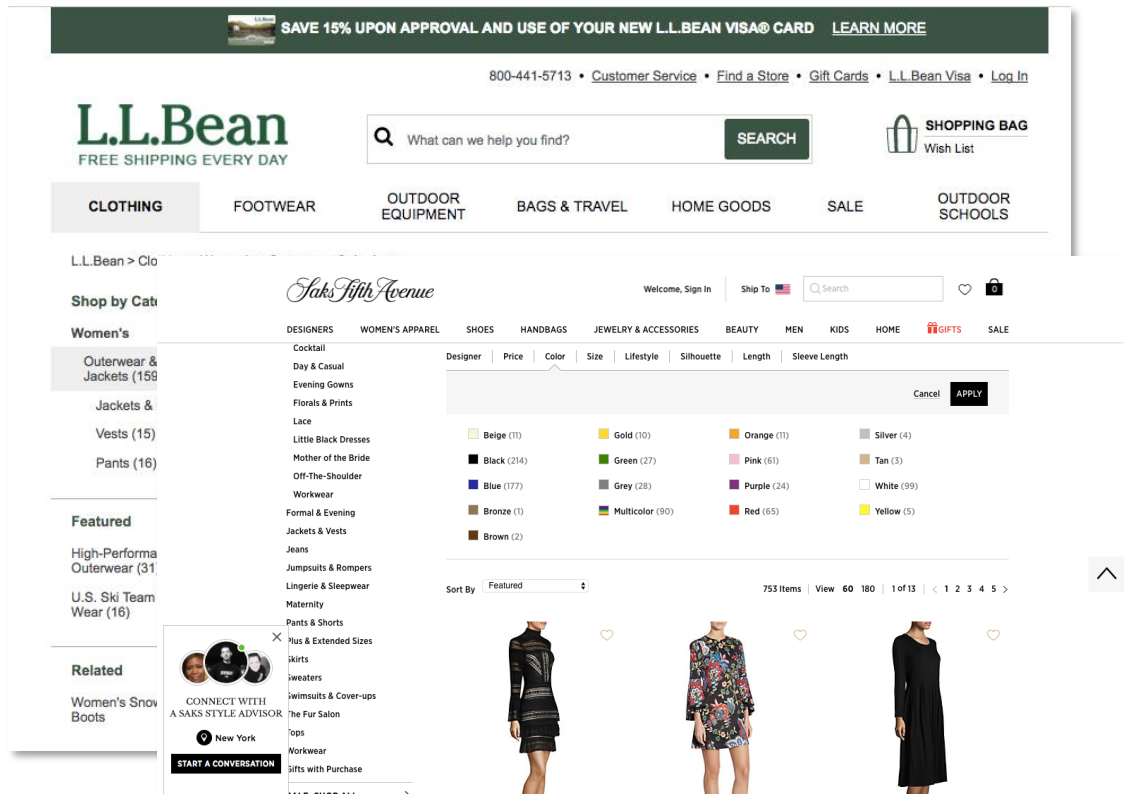
Quick View



Product Recommendations

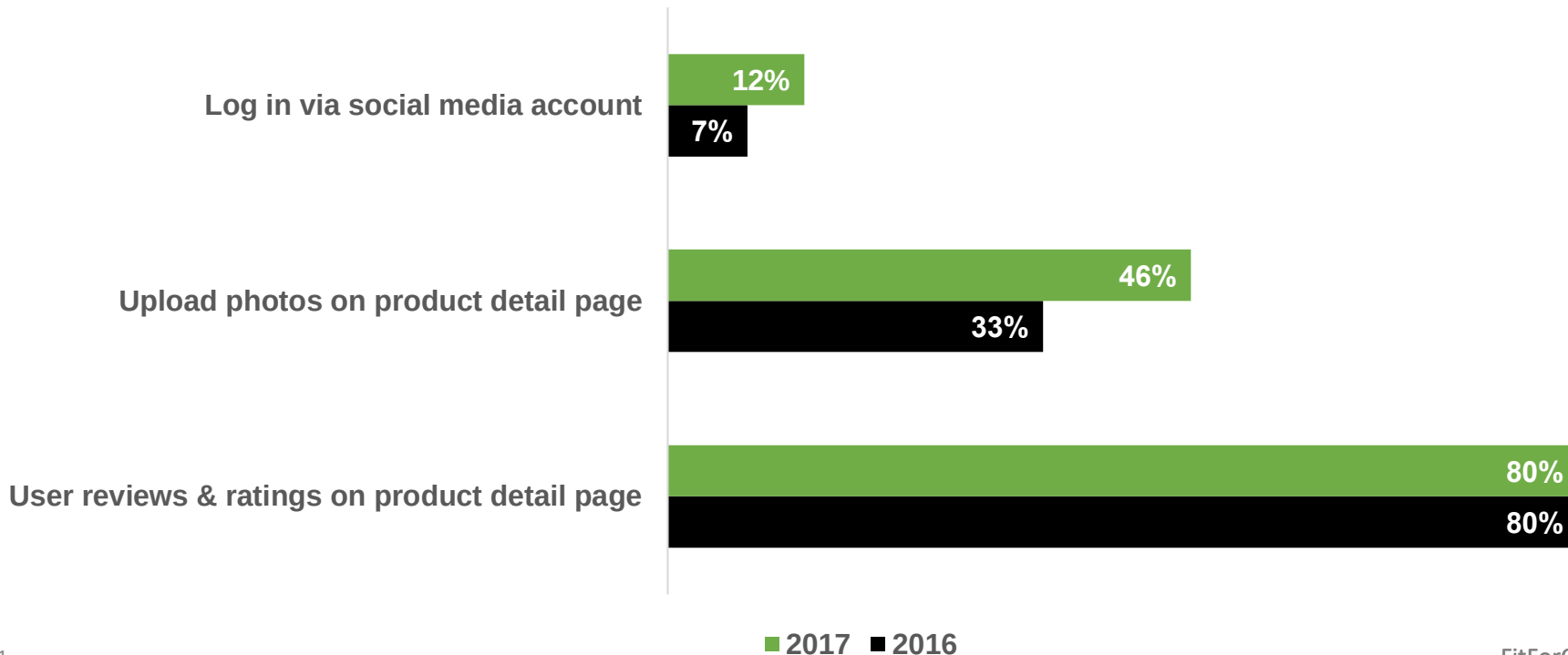


And many more



RETAILERS LOVE/HATE SOCIAL

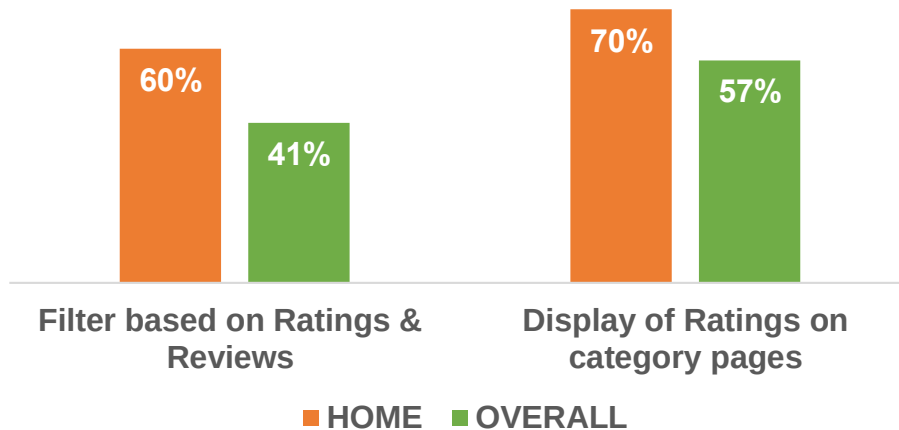
Adoption of social media content and login



HOME LEADS IN RATINGS AND REVIEWS



Adoption of Ratings and reviews 2017





Home > Closet > Shoe Storage > View All

REFINE

CATEGORY

Closet
Shoe Storage
View All

PRICE RANGE

Under \$10 (33)
\$10 to \$25 (32)
\$25 to \$50 (28)
\$50 to \$100 (3)
\$100 to \$500 (1)

COLOR



RATING

★★★★★
★★★★★ & Up
★★★★★ & Up
★★★★★ & Up
★★★★★ & Up

VIEW ALL

Products Matched: 95

Sort by: Default



Chrome Metal 10-Tier Rolling Shoe Rack
\$49.00
★★★★★



Quinn Navy Velvet Tufted Tuxedo Sofa

★★★★★ 5 reviews

Item 3201720

\$1,299.95

Our Quinn Collection boasts impressive tailoring and details that harken back to the Gilded Age of... [Read More](#)

Ship:

In Stock for In-Home Delivery to 10583
[CHANGE ZIP](#)

Pick Up:

[Free Ship To Store](#) - Available in about 14 days
[Yonkers Store](#)
[CHANGE STORE](#)

Qty 1

[ADD TO BASKET](#)

[+ ADD TO REGISTRY](#)
[♥ ADD TO WISHLIST](#)

[OPEN GALLERY \(4 IMAGES\)](#)



Show Us Your #pier1love



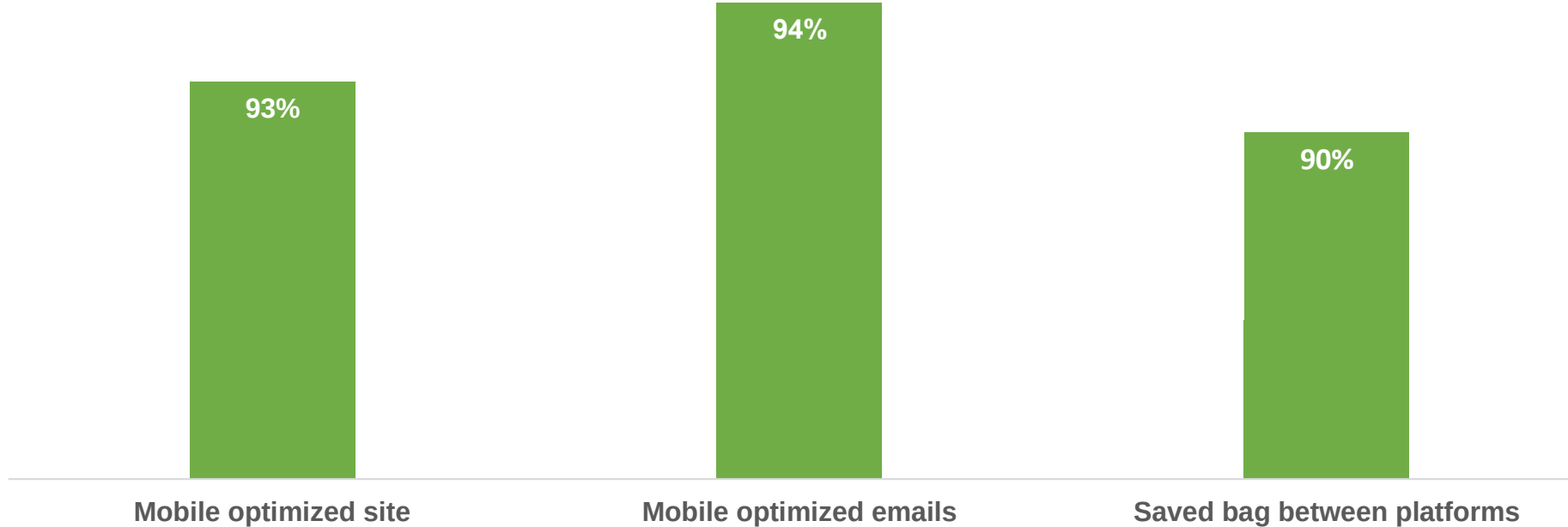
Share your photo of this item!



Pier1 imports®

MOBILE OPTIMIZATION TOPS ADOPTION RATES...BUT SHOULD BE HIGHER

Adoption of mobile best practices



#1

Mobile

Pier1 imports®

Mobile optimized site



Mobile optimized email



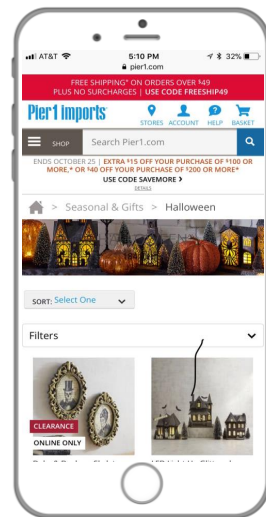
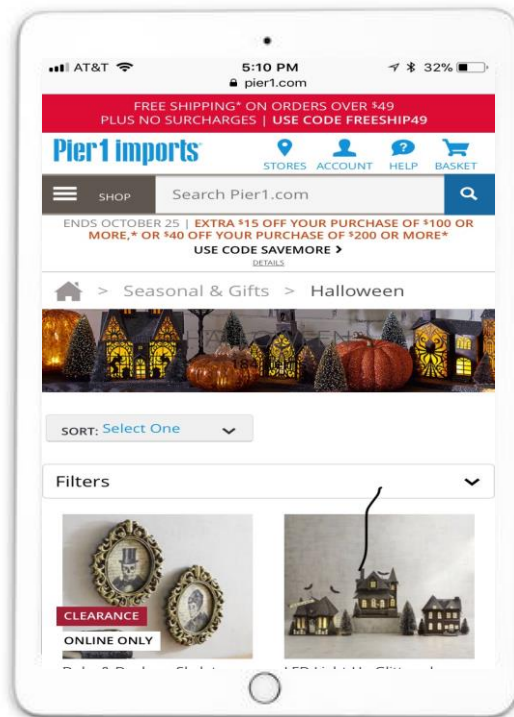
Saved bag between platforms



Zoom optimized for mobile

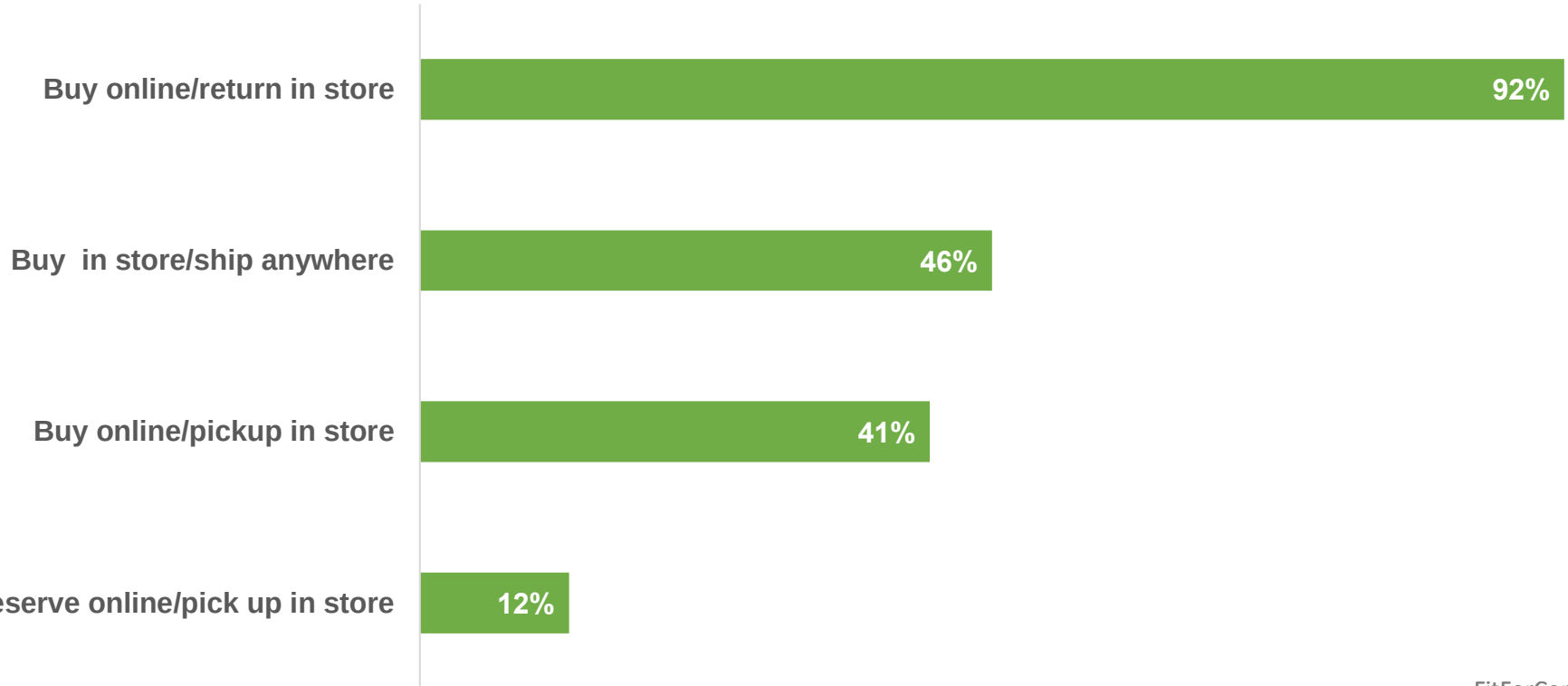


And many more



ADOPTION OF CROSS-CHANNEL GROWING

Omnichannel Service Offerings 2017





**At Nordstrom, curbside service
really is curbside!**

HOME TAKES ON OVERALL RETAIL IN CROSS-CHANNEL



50% of home retailers offer buy online/pick up in-store (vs 41% overall).

66% of home retailers offer shop in store/ship anywhere (vs 46% overall).



#1

Cross-
Channel

Crate&Barrel

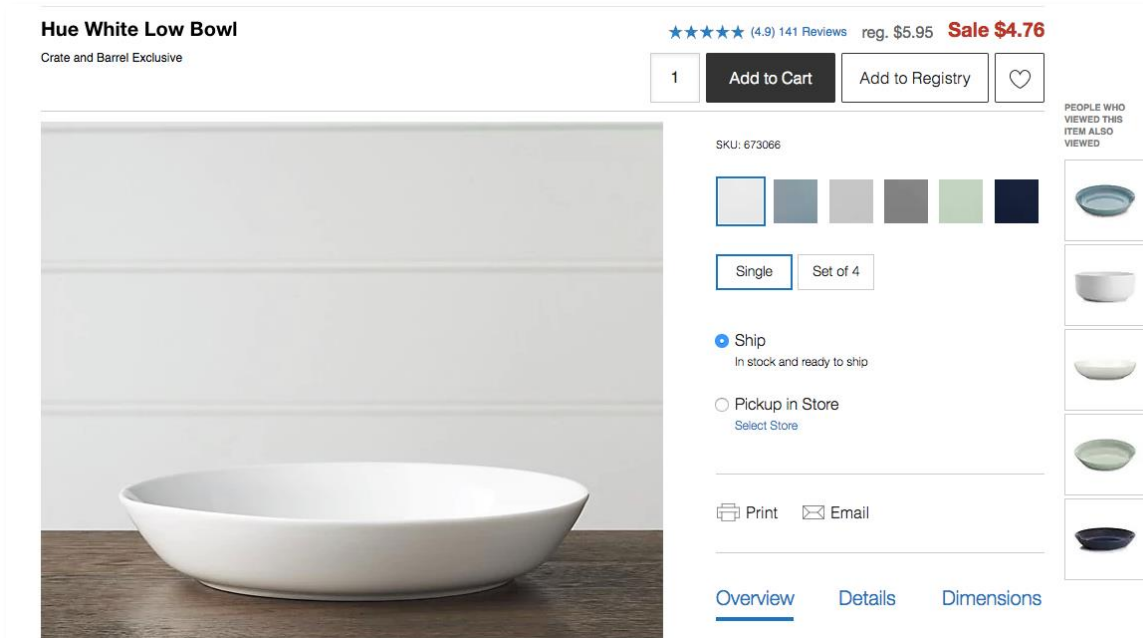
Filter by store availability ✓

Product Availability In store ✓

Buy Online Pickup In store ✓

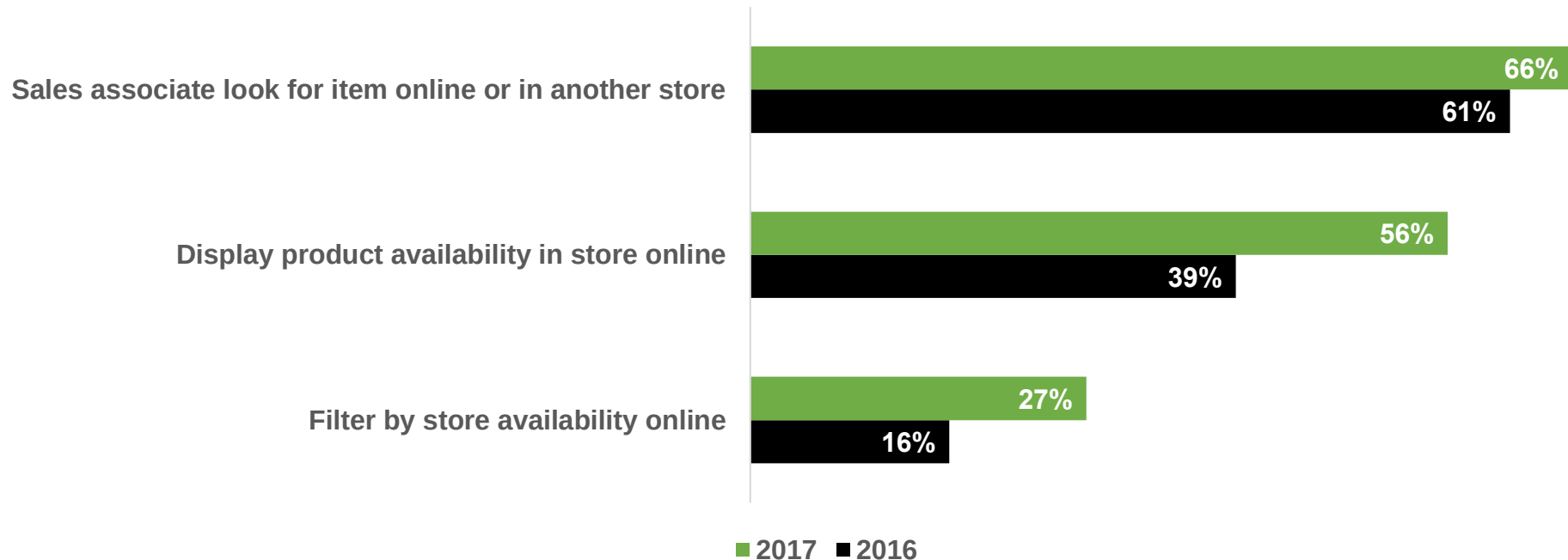
Buy Online Return In store ✓

Cross-channel gift card usage ✓



INVENTORY LOOKUP IS A MUST-HAVE

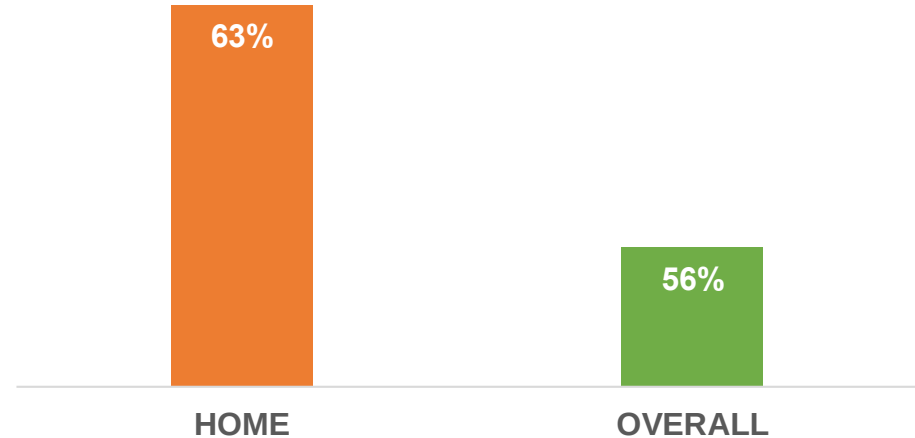
Product availability across channels



63% OF HOME RETAILERS OFFER IN-STORE PRODUCT AVAILABILITY



Product availability in store





Small Appliances found at Harlem, NY 10027

Departments

[All Small Appliances](#)

[Blenders \(11\)](#)

[Juicers \(3\)](#)

[Mixers & Attachments \(11\)](#)

[Toasters & Ovens \(10\)](#)

[Microwaves \(1\)](#)

[Coffee, Tea & Espresso \(114\)](#)

[Food Processors \(6\)](#)

[Panini Presses & Indoor Grills \(7\)](#)

[Slow Cookers \(4\)](#)

[Pressure Cookers \(1\)](#)

[Waffle Makers \(3\)](#)

[Fryers & Skillet \(1\)](#)

[Ice Cream Makers \(4\)](#)

[Rice Cookers \(3\)](#)

[Popcorn Makers \(1\)](#)

[Dehydrators \(1\)](#)

[Specialty \(11\)](#)

☐ All Products (2019)

☒ Available In Store (190)

Harlem, NY 10027 [\(change store\)](#) ▼

Showing 1 - 96 of 190 product(s) Sort by Select ▼



☒ Quick View
☐ Compare

Ninja® Kitchen System with Auto-iQ Boost™

★★★★★ 52 Reviews

\$179.99

Free Shipping on Orders Over \$29



☒ Quick View
☐ Compare

Electric Power Pressure Cooker XL™

As Seen on TV

Wedding Registry Favorite

★★★★★ 627 Reviews



☒ Quick View
☐ Compare

Cuisinart® Panini Press

Manufacturer

Wedding Registry

Exclusively



Ninja® Kitchen System with Auto-iQ Boost™

The Ninja Kitchen System with Auto-iQ Boost allows you to truly customize your drink-making experience, whether you're using Nutrient & Vitamin Extraction or High Performance Blending.

★★★★★ 52 Reviews | [Write a review](#)

Share This Product



[Read all Q&A](#) 28 Questions | 45 Answers

\$179.99

Free Shipping on Orders Over \$29

[ADD TO REGISTRY](#)

[ADD TO CART](#)

[SHOP ALL NINJA](#)

HOW DO YOU WANT YOUR ORDER?



Shipping

Usually Ships in 24 Hours

[Details & Costs](#) ▼



Store Pickup

Harlem Store

[Reserve Now](#)

[See More Stores](#) ▼

MISSED OPPORTUNITIES IN STORE

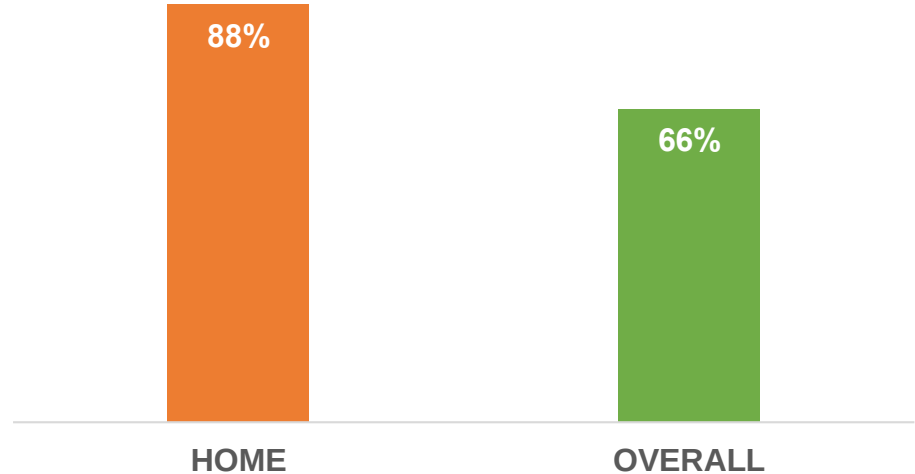
Adoption of services supporting cross-channel



ENDLESS AISLE STANDS OUT IN HOME

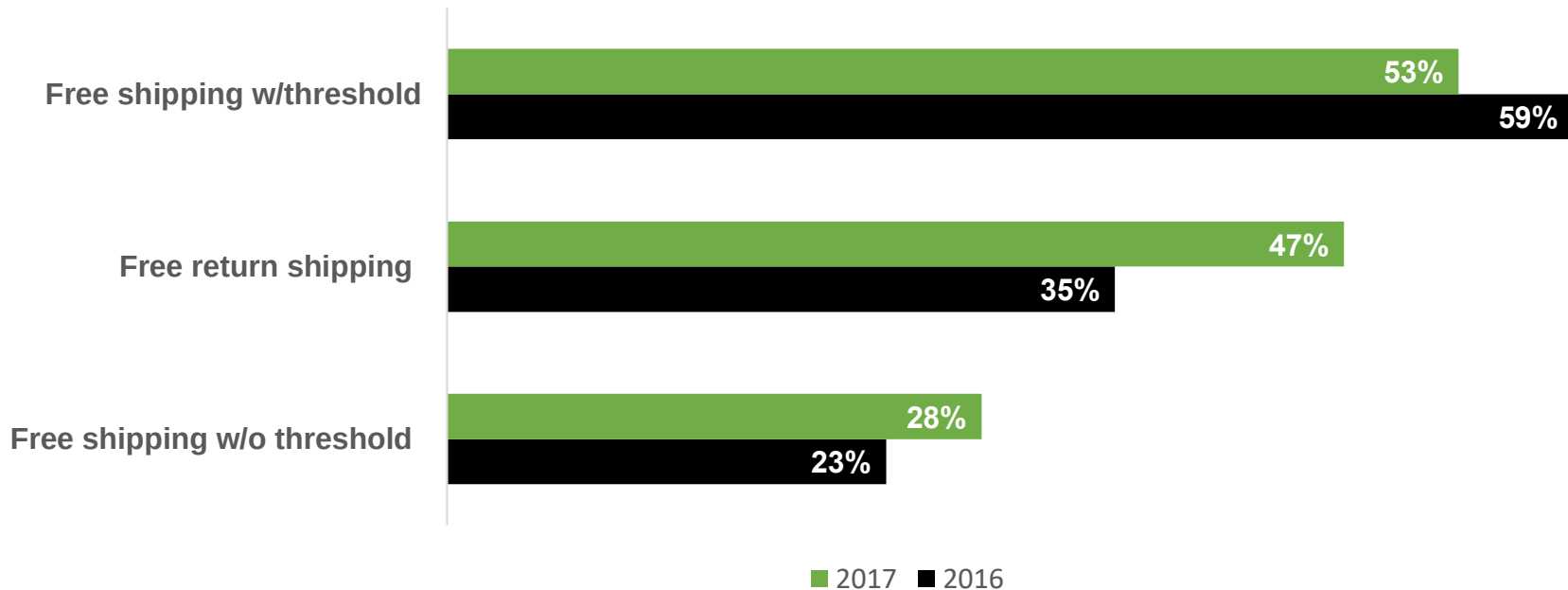


Empower sales associates to look up items online or from another store if the item is not available in their store



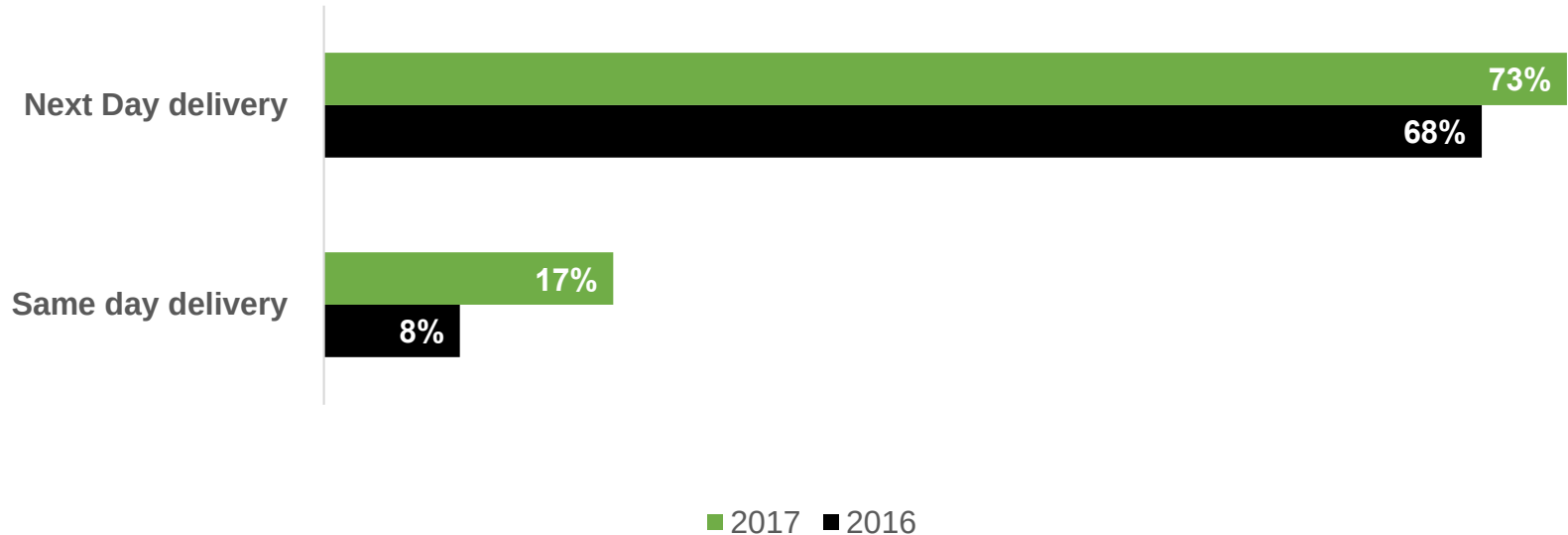
FREE RETURNS TAKE A LEAP FORWARD

Adoption of free shipping and free returns



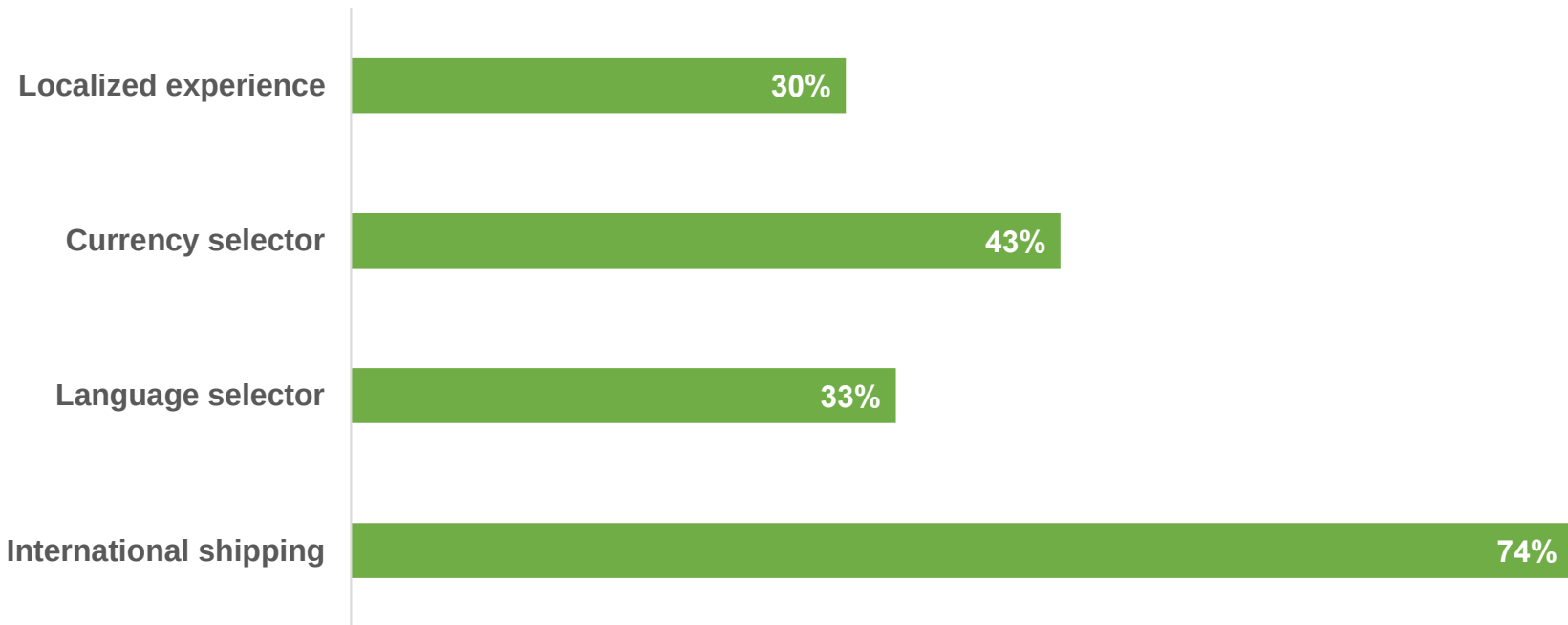
NEXT DAY DELIVERY IS A PRIORITY

Adoption of Next Day/Same Day Delivery



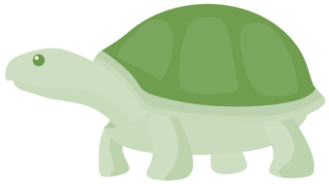
INTERNATIONAL IS GROWING, BUT THE EXPERIENCE FALLING SHORT

Global commerce adoption 2017



WRAPPING UP

- Much still to be done; even leaders aren't scoring high enough
- A lot of opportunity for savvy retailers to jump ahead of the pack
- Carry your brand promise throughout all digital interactions
- Thoroughly understand your core customer segments priorities
- Understand your competitive position
- The ENTIRE organization must be committed to providing truly exception customer experiences.
- Integrate ALL your customer data into one profile



Don't be the ostrich

HOW DO YOU STACK UP?

www.FitForCommerce.com | transformation@fitforcommerce.com

