NEWSTORE

OMNICHANNEL LEADERSHIP REPORT

2023

2023 Omnichannel Leadership Report

An assessment of 300 luxury, premium, and lifestyle brands' omnichannel competence.

"Digital transformation for retailers is impeded by existing processes, culture, and beliefs. For omnichannel, brands need two shifts in thinking. First, the customer does not see a channel, they see a brand. The channel is a method to interact with the brand. Thus, separating physical from digital makes little sense. With that in mind, brands should also be mindful not to organize their teams by channel either. Second, the customer belongs at the center of the omnichannel experience, not at the end of the line. Build around the customer and seek their feedback along the way."

– LIZA AMLANI, PRINCIPAL AND FOUNDER, RETAIL STRATEGY GROUP

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Introduction

Changemakers Rise

Retail has faced disruption for several years now. Traditional and digital native brands alike have had their normal operations turned upside down, both from happenings they couldn't have predicted and ones that have long been forecasted. Either way, the challenges have exposed that the retail industry must wholly shape a new landscape that can support what's yet to come. It's a positive output of tough times and a chance for many brands to finally play the long game.

In the 2023 Omnichannel Leadership Report, we assess the current state of retail and progress toward digital transformation. Specifically, we identify which brands have been guided by the belief that, even during unprecedented times, investments are worth making as well as which brands simply haven't had the wherewithal to change.

Overall, our data and insights tell us that more brands than not have been focused on simply cushioning their businesses from current macro environment factors. Instead, brands should be creating digital transformation plans that have a clear path to omnichannel. Technology is one key component. The other is people. People who are changemakers and have a vision for tomorrow. This is how you fortify your brand for the future.


3:35
RIB SLIM DRESS
CHOOSE A COLOR
Features
$110.00

1

Determine the current state of omnichannel retail and year-over-year progress

2

Assess the availability of critical solutions and services across key brand channels

3

Review the seamlessness and ease of use of each omnichannel service

4

Provide leading brands with first-person feedback on their customer experience

5

Identify opportunities for brands to align their investments with customer expectations

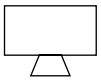
Methodology

The Omnichannel Leadership Report is a critical assessment of 300 leading luxury, premium, and lifestyle retail brands. In this North American edition, a team of mystery shoppers audited each brand's online, mobile app, and in-store shopping experiences to determine their omnichannel competence. The surveys uncover what capabilities and services brands have in place across these critical touchpoints as well as what tools employees are empowered with — all from the customer point-of-view.

The shopping experience is what sets omnichannel leaders apart from laggards. That is why this research looks at how brands are delivering omnichannel value across three experience opportunities: **Online**, **Mobile**, and **In-store**. Ultimately, omnichannel provides customers with a convenient and frictionless shopping experience between and within channels. We assess if brands are delivering on this best practice.

What We Looked At *(plus more)*

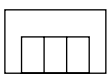
Online Experience
Live chat, BOPIS, BORIS, virtual appointments, store inventory visibility



Mobile Experience
App availability, loyalty, live chat, inventory visibility, mobile wallet payments



Store Experience
Associate mobility, inventory visibility, endless aisle, mobile checkout, contactless payments



To determine competence, each survey question across the three research sections was given 1-3 points based on the role the capability or process plays in omnichannel. The more relevant the capability or process, the more points it was worth. These points determined each brand's section score, as well as the overall score and report ranking. Through this process, we can identify the 2023 Omnichannel Leaders.

Executive Summary

The retail industry was delivered a one-two punch from 2020-2022 with the pandemic and a tough macro environment. While no company is entirely immune to the challenges of supply chain delays, inflation, and geopolitical tension, among other forces, a subset of brands has shown strength in the eye of the storm. There are also those that have faltered.

Brands that started their digital transformation journeys prior to the pandemic have been in the best position this past research period to increase their capital spending and continue investing in omnichannel systems and services. Those who didn't make substantial changes 3 to 4 years ago, and rather have relied on quarter-by-quarter decision-making, have had to heed the headwinds and slow the pace of their omnichannel evolution.

Further, there is an undeniable bifurcation in omnichannel competence. We segmented the brands in this report into four categories: Basic, Mid-market, Premium, and Luxury. While the data shows omnichannel growth and transformation in the Basic and Luxury segments, Mid-market and Premium brands have stagnated. What is clear is that today's consumer demands omnichannel at every level of retail, and short-term thinking puts long-term brand growth at risk.

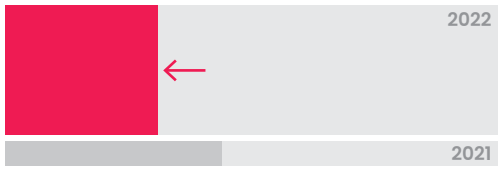
Half-baked and band-aid solutions or simply doing nothing is not enough in an industry where volatility is becoming the new normal. Omnichannel provides inoculation from not only everyday factors but also flexibility for the future. With expectations for a slow macro environment rebound, this is the only way to keep retail alive.

Data Highlights



up from 53% in 2021

54% of brands offer **BOPIS**



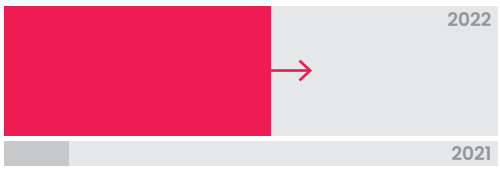
down from 44% in 2021

31% of brands show **store inventory availability** online



slightly down from 34% in 2021

33% of brands have a **mobile app**



up from just 13% in 2021

54% of brands offer **endless aisle**



up from 74% in 2021

76% of brands accept **contactless payments** in-store

KEY TAKEAWAY

Basic brands are all-in on mobile apps.

There's no easier way for a brand to get closer to its customer than on mobile where people spend a third of their daily waking hours. Our research found that Basic (moderate price and quality) brands are on mobile more than other retail segments. They also offer their customers the best and most robust mobile app experiences overall with features that not only make buying in-app easy but also enrich online shopping and in-store service.

Basic brands typically cater to millennials (ages 24-39). According to data.ai's State of Mobile 2022 report, this demographic indexes highest when it comes to mobile shopping app downloads. So, what this tells us is that Basic brands are meeting their customers where they are and in the format they prefer. They're thanking customers with unique and personalized experiences and likely seeing digital revenue growth as a result. The rest of the industry needs to take a page out of the Basic brand playbook and go all-in on mobile apps.

KEY TAKEAWAY

Luxury brands need to adapt for digital.

You can count on your favorite Luxury brand for a superior in-store shopping experience. They wouldn't be a Luxury brand after all if their high quality and exclusivity didn't translate to the physical world. But our data suggests the Luxury retail segment continues to deprioritize its online experiences, focusing on website fashion over function. This is despite a dramatic shift to ecommerce in the last few years, as well as the knowledge that millennials and Gen Z are expected to soon account for most of the luxury spending.

It is important for Luxury brands to double down on offering the same omnichannel experiences online as other segments, especially table stake services like BOPIS and BORIS, which these brands have implemented the least across the industry. The reality is there is a new luxury consumer in town, and she expects these capabilities. If these brands want to stay relevant and have longevity, they need to adapt their approach to digital retail.

KEY TAKEAWAY

Multichannel isn't and won't be good enough.

Inventory accuracy is fundamental to omnichannel retailing. It's also one of the variables that most impacts the customer experience. Yet, some of the most improvable questions in the research have to do with customers being able to see cross-channel inventory. This tells us that many brands are operating as multichannel organizations and not omnichannel. Multichannel means many channels. Where it differs greatly from omnichannel is that it doesn't allow for a seamless and integrated experience across those many channels.

If the brands in our research population were in fact omnichannel, inventory information wouldn't be closed off. Instead, customers online or in an app would have an accurate view of all stock, allowing them to shop wherever and however works best for them.

Multichannel isn't and won't be good enough moving forward — for customers or long-term business profitability. McKinsey found omnichannel customers make purchases 70% more often and spend about 34% more than people who shop one channel exclusively. Brands need to implement the systems that support true omnichannel retailing, or their buyers will spend those hard-earned dollars elsewhere.

Omnichannel Leaders

HIBBETT SPORTS

Hibbett Sports underwent a full digital transformation in 2017 after only operating stores for its first 70 years. It was decades late to ecommerce, but it used that reality to its advantage to launch an online business with proven omnichannel capabilities on day one. But having BOPIS, ROPIS, BORIS, and more weren't just to check a box; Hibbett Sports had the customer data to know these services would add value. And they have. With a winning tech stack solidly in place throughout the last few years, the brand has been able to focus on optimizing instead of implementing. With a mobile app now in the mix, too, Hibbett Sports is ready for the customer of today and tomorrow.

SHOE CARNIVAL

Shoe Carnival is all about delivering "wow!" moments, big or small. To ensure these experiences reached its most loyal customers, in 2014, it doubled down on its omnichannel agenda by using stores as fulfillment centers and launching its first-ever mobile app. Then, throughout the pandemic, Shoe Carnival evolved further as part of a customer-centric business transformation, which meant bringing many of its dynamic in-store experiences to the digital world, too. With modern services like store inventory visibility on its website and same-day delivery, Shoe Carnival has thrived during one of the most challenging times in modern retail.



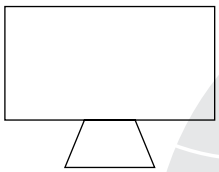
Bloomingdale's is celebrating its 150th year in business. In recent years, parent company Macy's has looked at the department store as a test platform for innovation. These investments have helped it enhance how it puts the consumer experience front and center, including in-store, where its stylists are equipped with digital tools that allow them to sell across all Bloomingdale's locations. The brand gives equal flexibility to customers with its mobile shopping app in which they can scan items themselves in-store, truly intertwining digital and physical retail. It's no surprise Bloomingdale's is consistently recognized as a top digital and omnichannel department store.

Sephora is known for its technological advancements, disrupting not only the beauty industry but also retail at large. Much of this success can be tied to the founding of its Innovation Lab where it specifically builds and tests digital solutions to enhance its in-store and online shopping experiences. Every time Sephora rolls out an innovation, whether online, in-store, or in its mobile app, it is a useful technology that enables shoppers to learn new techniques and engage with beauty experts. Time and again, the brand delivers solutions that improve customer confidence in purchasing Sephora products.

Lululemon saw an opportunity in 2016 to digitally transform its business to support its goal of building community and relationships. It had almost two decades of data about its shoppers, but it was siloed across online and in-store systems. A core part of Lululemon's transformation journey was to unify all data sources with a focus on stores so educators could make every touchpoint with customers count. The brand has continued to make smart and strategic digital investments like this since. From evolving its stores into experience hubs to enhancing its appointments to acquiring the Mirror, Lululemon is a top example of omnichannel in motion.

Online Experience

Shopping is motivated by emotion. When it comes to online shopping, the experience is driven specifically by convenience, accuracy, and immediate gratification. These things elicit feelings of satisfaction that can't be beaten. They are the reason behind eMarketer's finding that over half of U.S. consumers shop online at least once a week. It is critically important that brands put forth an online experience that not only satisfies customers' emotions but also differentiates them from juggernauts like Amazon and the budding marketplace ecosystem. While ecommerce sales overall may be slowing, consumers engaging with brands online is not going anywhere.

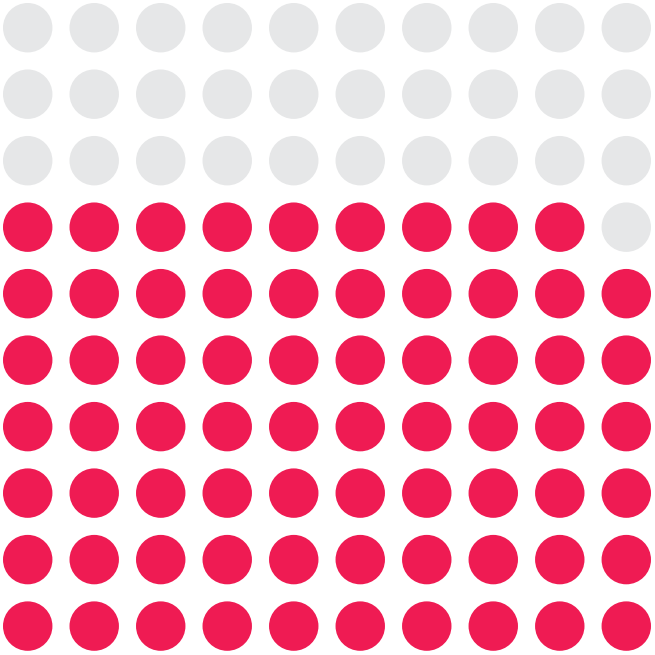




While ecommerce sales overall may be slowing, consumers engaging with brands online is not going anywhere.

Let's Chat!

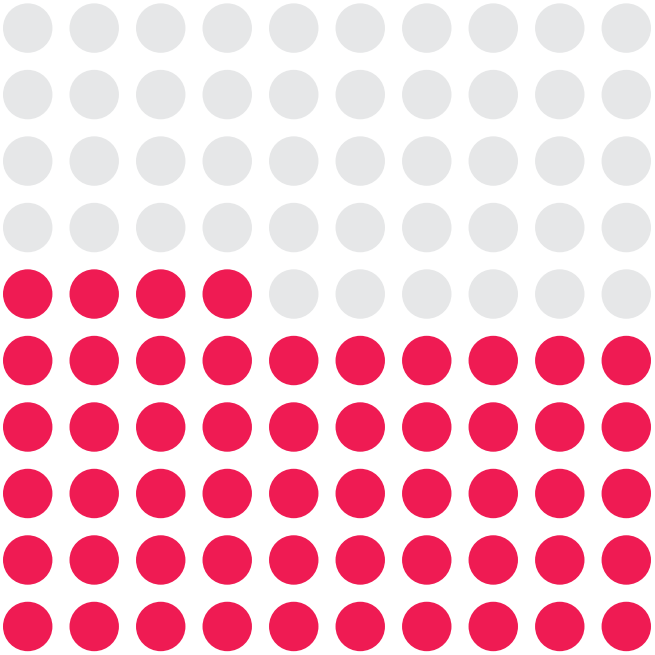
It's not unlikely that a customer will have a question when shopping on your website, whether about size, fit, or delivery. To avoid questions becoming hesitations, 69% of brands have live chat functions online. It's a great way to humanize the website, engage customers, and convert sales. However, our mystery shoppers found only 4% of those chat experiences were with store associates, the people who know your brand best. It's time to introduce omnichannel associates.



69% of brands offer live web chat capabilities

Click for Convenience

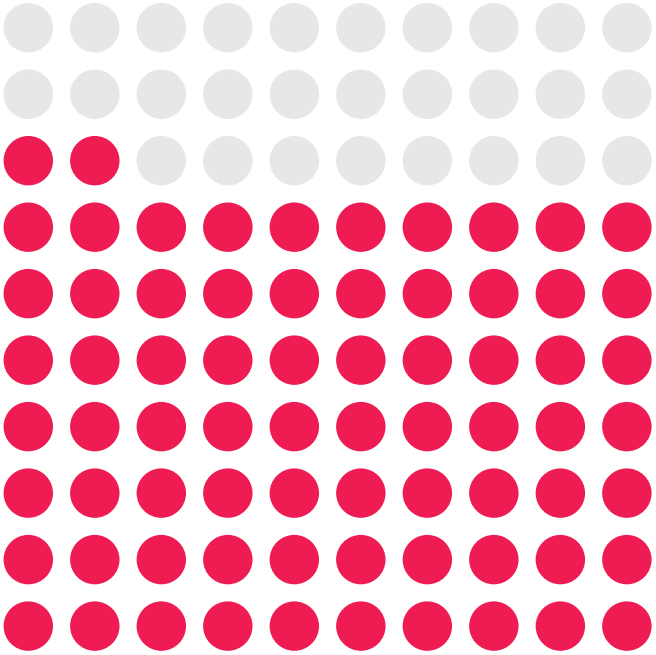
The ICSC found over 50% of online shoppers use BOPIS with 61% using it at least once per month. It is popular because it saves both time and money, which are worth their weight in gold to consumers. It's a good thing then that 54% of brands offer BOPIS services. However, its sister service curbside pickup is down from 34% in 2021 to 25% in 2022. Brands are shifting back to just BOPIS not only to get more feet back in stores but also with labor shortages, they don't have the staff to support a curbside operation.



54% of brands offer order pickup in-store (BOPIS)

Buy Here, Return There

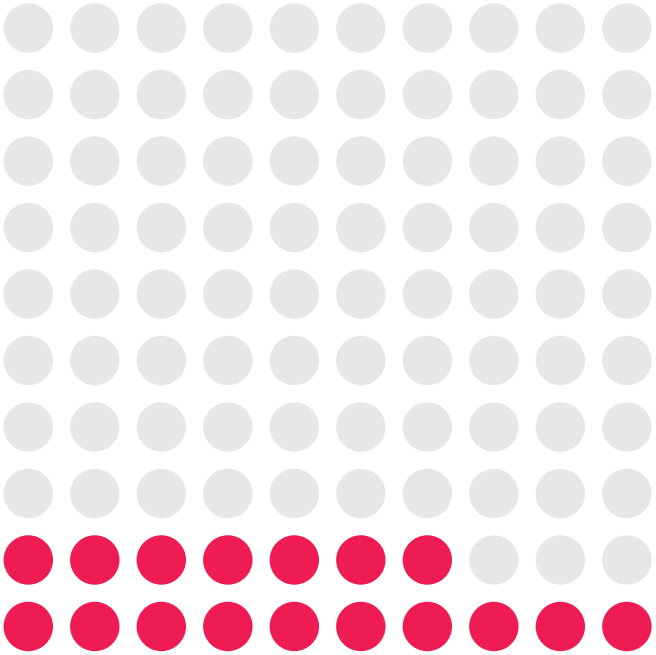
More and more consumers are prioritizing convenience when it comes to buying online, and that includes having the option to return an online order at a store location. In fact, Shippo and Loop found that a whopping 84% of consumers read the return policy before deciding to buy. Taking a customer-centric approach to returns allows 72% of brands to build trust while also upping the chance of extra purchases.



72% **of brands offer order return in-store (BORIS)**

Live From Your Favorite Brand

Virtual appointments have been used by brands for personal shopping and to connect customers to stores when they can't physically be in them. While they were a positive output of the pandemic, brands aren't seeming to find as much value now as only 17% offer them. Instead, the focus has shifted to footfall in stores where there are better opportunities for discovery, cross-selling, and impulse sales. Video isn't out for good, though; we expect it to work its way into clienteling apps and for brands to experiment more with live streaming.



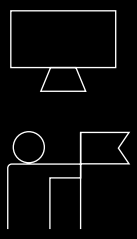
17% **of brands offer virtual appointments**

Show Me More, Please

The last thing a customer has patience for is a website that says a product is available in-store, only to go there and find out it's not. According to Profitect, that's a bad enough experience for 20% of consumers never to shop that retail brand again. It's why providing active inventory visibility is so important. We found only 31% of brands offer this view to customers on their websites, down from 44% in 2021. As customers set the bar higher for the accuracy they expect, some brands seem to be removing the capability because they simply can't get it right.

31%

of websites show store inventory availability



chico's

Crate&Barrel

lululemon

bloomingdale's

HIBBETT SPORTS

The Customer POV

"Website is modern, easy to navigate, and functional."

"Super easy to use and had so many functions that were easily accessible."

"A basic site — you can shop from it but that is all that it offers."

"Experience was like a typical online store — there was no wow factor."

"There were features offered that, in the end, did not work."

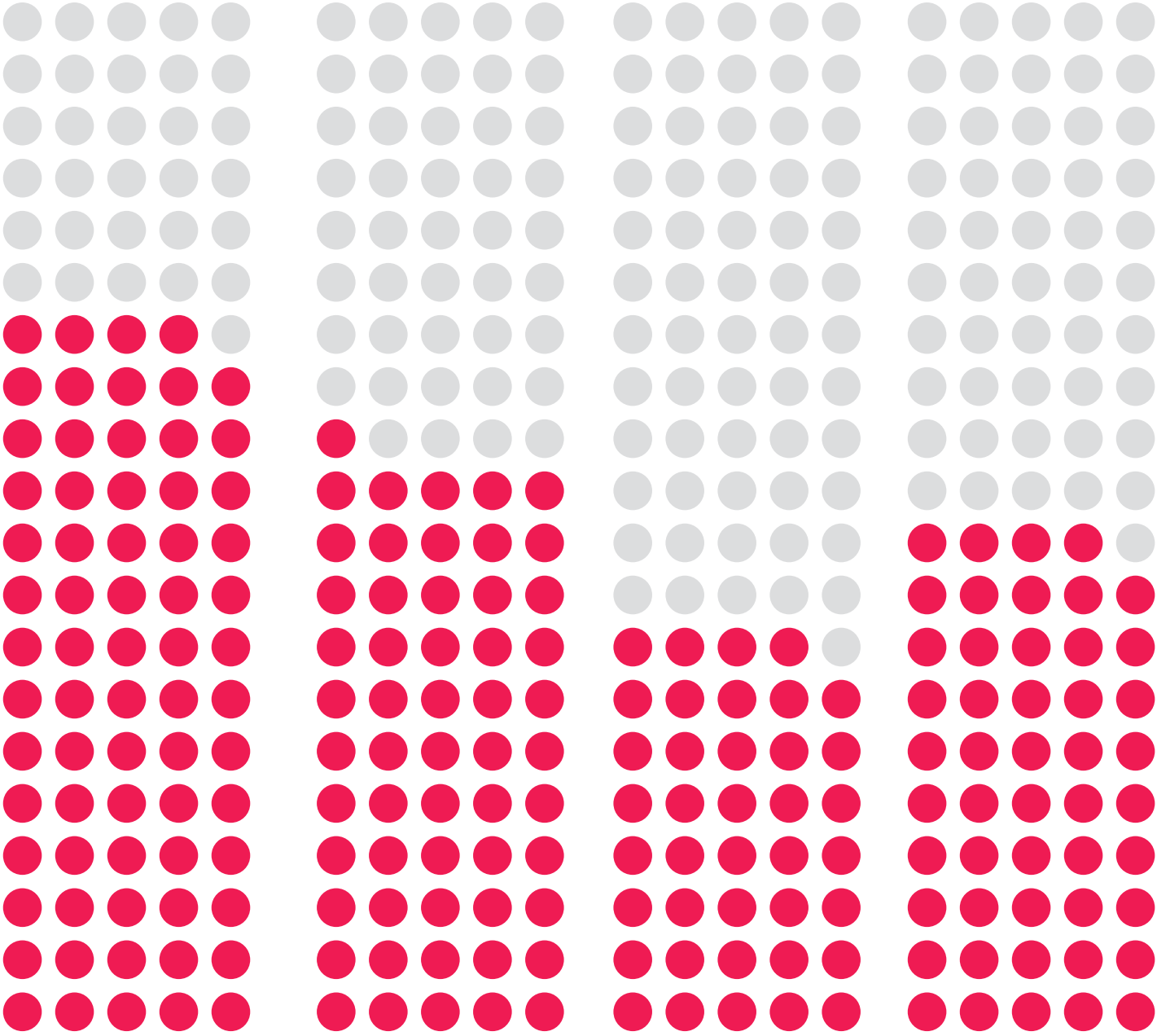
Our Take

There is no denying there is a battle for consumers' attention online. We've gleaned from our data that those retail brands offering a winning online experience don't just make it about buying; the website is unique, personalized, and easy to use while adding value through a robust set of services. On the other hand, there are online experiences that don't align with consumer expectations. While some of these websites are visually appealing, their features are cumbersome, and the information is hard to find. According to a study from Propel Software, when the experience is poor, 54% of shoppers will stop shopping from a brand for good.

We know brands were under a lot of pressure during the pandemic to enhance their online experiences. Many projects were executed without the usual planning or preparation. But that was then, and this is now. It is time to think long-term and optimize to ensure your website can support the new online consumer while assisting other channels, too. Your digital storefront isn't a "set it and forget it" property. Be sure to make technology and innovation work for you.

BOPIS

Buy Online Pickup In-Store



69% Basic

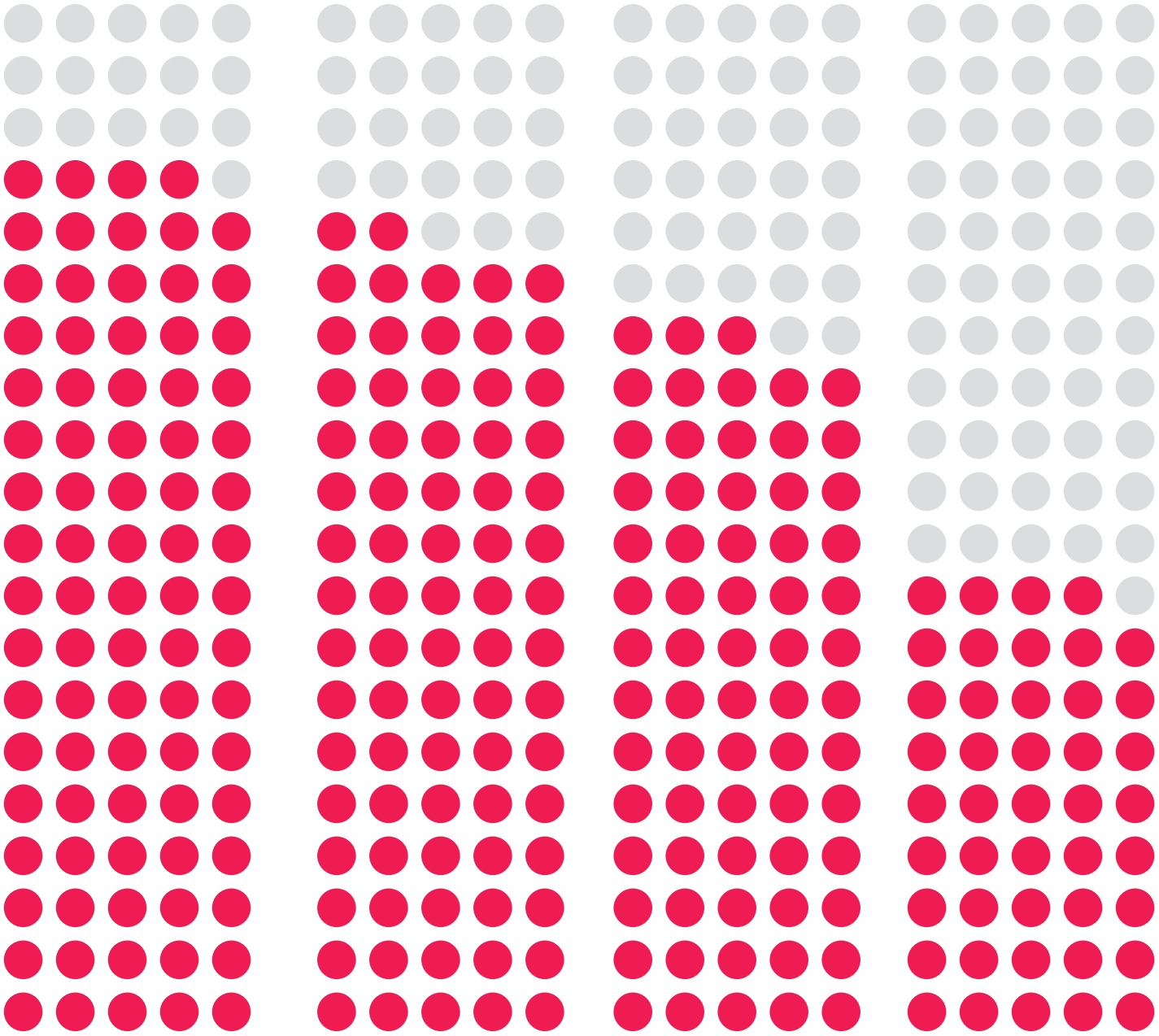
56% Mid-Market

39% Premium

49% Luxury

BORIS

Buy Online Return In-Store



84% Basic

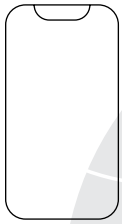
77% Mid-Market

68% Premium

44% Luxury

Mobile Experience

In a secondary piece of research, we found that 1 in 3 consumers prefer mobile shopping apps to all other channels. The top reason consumers are using apps over websites or even stores is the experience. When built as unique properties and not as "websites optimized for tiny screens," apps can be made easy-to-use and feature-rich. According to eMarketer, the features that consumers value the most are those that bridge online and in-store. Thus, it's safe to say that mobile apps are an important piece of the future of retail and the omnichannel puzzle.



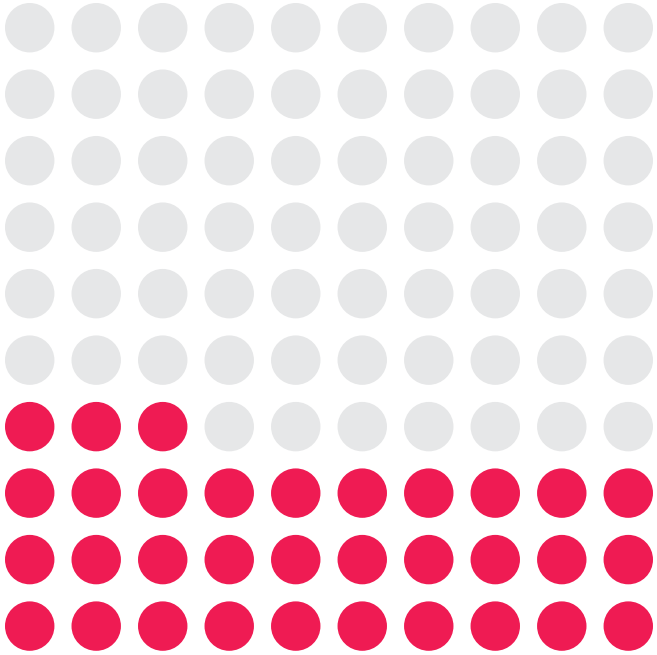


1 in 3 consumers prefer mobile shopping apps to all other channels

The top reason consumers are using apps over websites or even stores is the experience.

Open 24 Hours... in a Row!

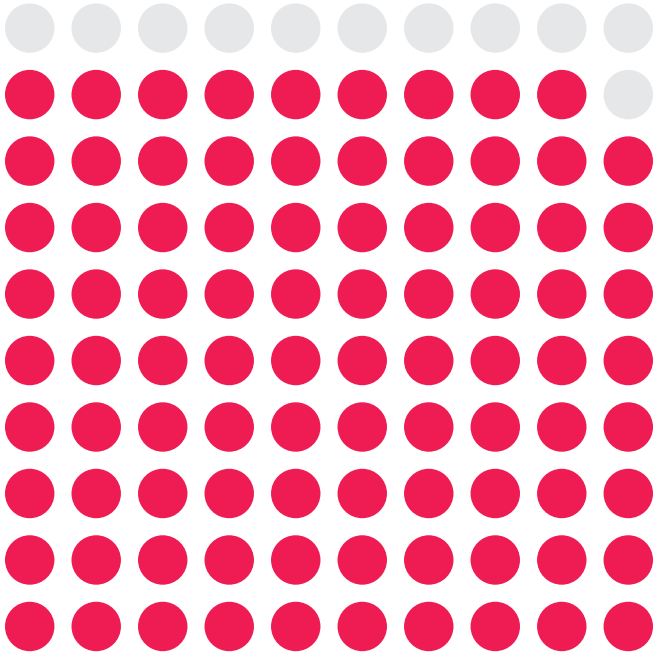
Consumers are consciously choosing to spend more time on their mobile devices and in-app specifically. In fact, people downloaded a whopping 230 billion apps in 2021 — likely including those from 33% of the brands in our research. Clearly, mobile apps are a customer experience channel that is growing in both popularity and utility. If there are any channel conflict concerns, the data is saying to put them aside and invest in a mobile shopping app or risk losing a captive customer cohort.



33% **of brands have a mobile shopping app**

All About the Benefits

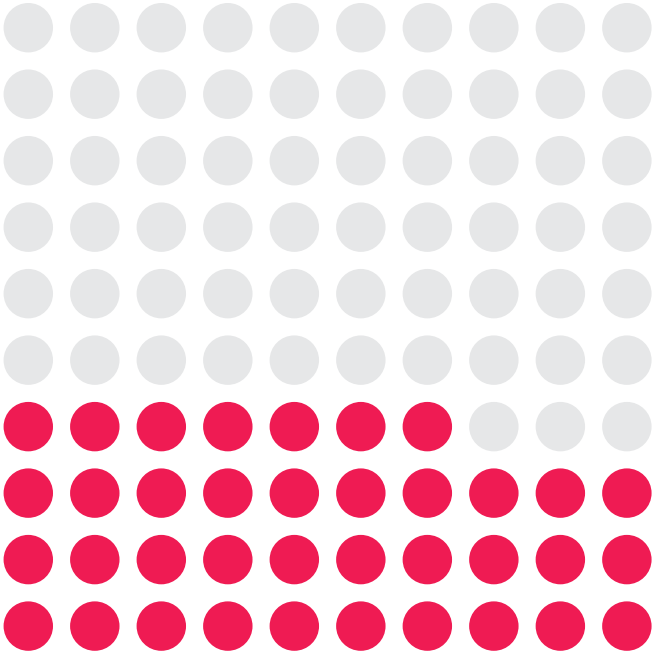
Consumers don't just hope for rewards and points in retail. It is one of the industries where most people expect them. But they don't just want them any old way. A Wirecard study found that customers want to manage their loyalty incentives digitally, from discounts to vouchers to gifts. And 60% of consumers want a mobile shopping app to be the answer. Of the 33% of brands in our research with an app, 89% give shoppers easy access to their loyalty information. Plastic loyalty cards are dead.



89% **of branded apps give access to loyalty info**

Don't Leave Me Hanging

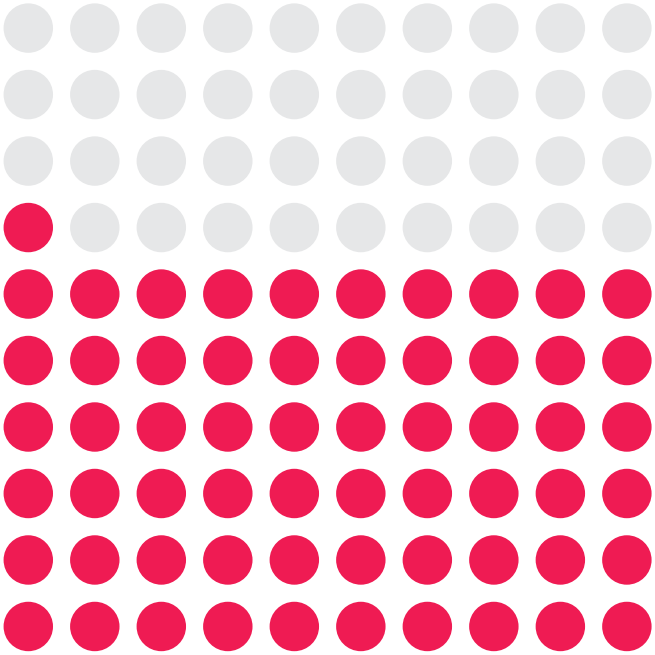
An app is no different than a website or store for a customer when they're shopping. Meaning, if they have a question, they expect to be able to talk to someone on the spot to get an answer. However, of the brands in our research with mobile apps, only 37% allow customers to chat with a store or customer service rep directly. This is compared to 69% on the website. A stark difference suggests brands may be undermining the conversion capability of app shoppers.



37% **of branded apps offer in-app chat capabilities**

Visibility: Mostly Clear

Mobile shopping apps are a great way to connect customers to stores, whether through in-app chat or by showing store inventory information on the product detail page (61% of branded apps do the latter). Showing stock availability can be especially useful in driving store traffic, but only if the customer is confident that what you say is available will be available. A transparent product experience is critical to a positive mobile app experience (online and in-store, too).



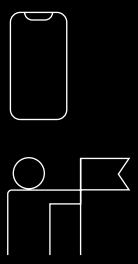
61% **of branded apps show store inventory**

Let Me Pay My Way

Juniper Research found that digital wallet users will exceed 4.4 billion by 2025. With this finding comes a strong recommendation that merchants offer a mobile app featuring correct mobile wallet integrations. Of course, what makes an app superior to a mobile website is its delivery of a faster, smoother experience through checkout. 66% of apps offer mobile wallet payments today (a majority), but there's still more opportunity to give mobile customers the simplest and most seamless way to pay.

66%

of branded apps offer mobile wallet payments



Crate&Barrel

Levi's

macy's

TALBOTS

bloomingdale's

The Customer POV

"While functions were limited, it worked as intended."

"Experience with the app was OK; features did not seem to be logically located."

"Has all the functionality of the mobile and desktop sites."

"Super fast, has a really nice user interface, easy to understand and navigate."

"Gives off a sense of upscale elegance, which is exactly what you feel in-store."

Our Take

Across the three experience opportunities in the report (Online, Mobile, and In-store), brands scored the least points on Mobile. That's not to say there aren't several superior branded apps that operate like digital flagship stores because there are. However, the data and mystery shopper insights reveal most actually are just like the website. Basic buying processes and some omnichannel services. While having a mobile shopping app is important first and foremost, having one that's exactly like the website should be the bare minimum and not the standard. Customers don't want their mobile app experiences to be the same as online. They want one that is unique, personalized, and as frictionless as possible.

With 40% of U.S. ecommerce sales predicted to take place on mobile devices in 2023, there is a huge opportunity for brands in the year ahead to improve their mobile app experiences. Unlike websites, mobile app shoppers typically aren't fleeting. They've made a conscious decision to put your brand logo in their pocket. If the experience is good, they'll spend more money more often. Apps will continue to shape consumers' mobile buying habits, so it's important to deliver an experience they'll have no choice but to give five stars.

Mobile Apps



59% Basic

32% Mid-Market

18% Premium

15% Luxury

In-App BOPIS



91% Basic

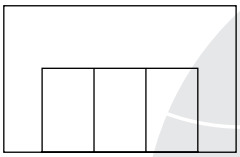
68% Mid-Market

23% Premium

83% Luxury

Store Experience

Digital sales are growing, but the role of the store remains pivotal in retail. Not only is the store a place to market and drive transactions, but it also supports buying, fulfilling, and returning across other channels. As the pendulum swings back to brick-and-mortar in 2023, the store experience will be important to capture shoppers' hearts, minds, and wallets. According to Raydiant, consumers say one of the top things that make a good store experience is customer service. This is a leg up that most stores already have over digital retail because of store associates; however, associates not empowered with technology that provides real-time order, customer, and inventory data won't cut it anymore.

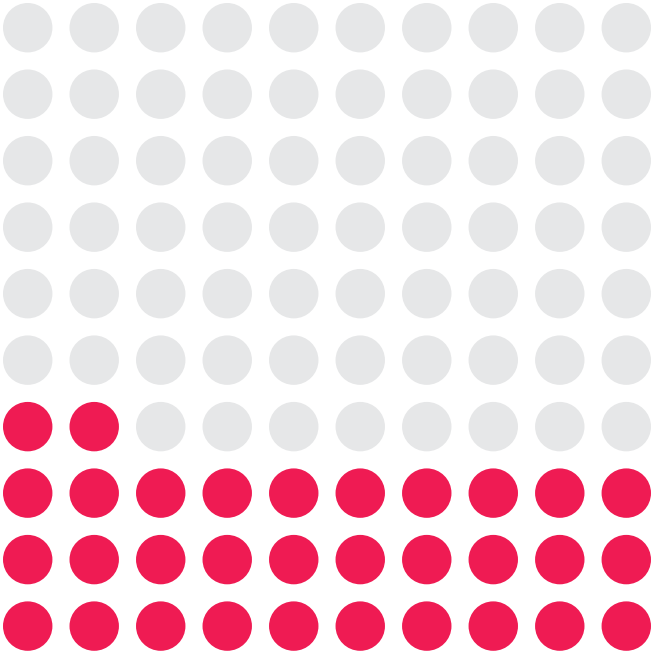




Not only is the store a place to market and drive transactions, but it also supports buying, fulfilling, and returning across other channels.

The Mobility is Missing

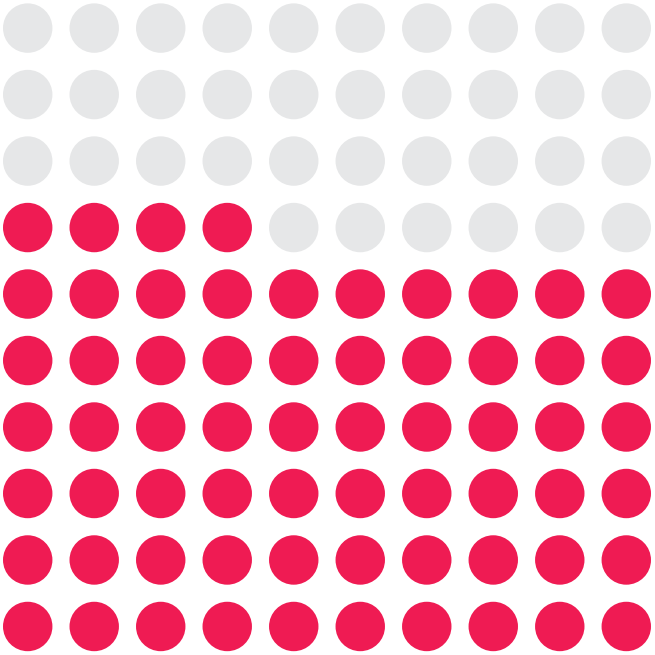
Some brands have gone all-in on rolling out hundreds of thousands of devices to their store associate fleets in the last few years. But they seem to be the outliers when it comes to associate mobility, as only 32% of brands in the report arm their store associates with mobile devices. While mobile devices for associates are on most brands' store investment lists, something is holding them back. And it might be their network. Most brands believe their current network can't keep up with mobile device usage. This isn't good for the associate or the consumer, and it's also unnecessary in a world of ubiquitous internet availability.



32% **of store associates use mobile devices**

Stocked to the Brim

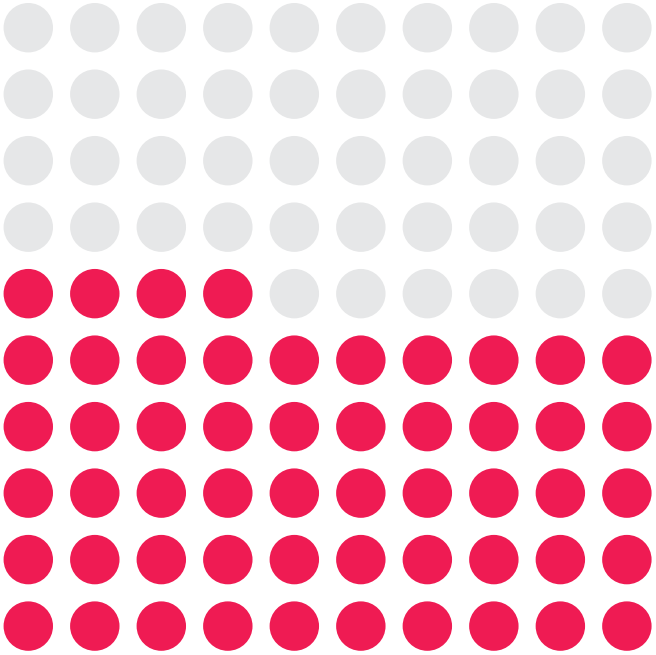
Inventory management has long been a challenge in retail. It has become even more daunting in recent years as brands have grown across channels and considering supply chain disruptions. While 64% of stores do have visibility into stock at other locations, that hasn't insulated them from issues like inventory glut. Moving forward, brands need to be less concerned about running out of stock and more interested in mastering visibility to align supply to demand during challenging times.



64% **of stores have access to enterprise-wide inventory**

Always Be Selling

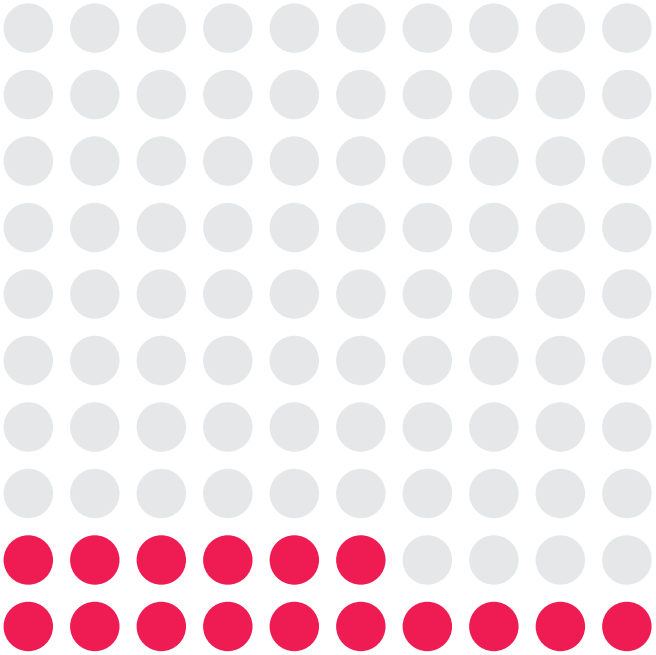
One thing the inventory glut in 2022 has accelerated is the need to be able to sell inventory from other locations. We found 54% of stores can sell inventory from other locations, up a dramatic 315% from 2021. Brands have clearly been determined not to sit on the excess inventory — which has wide-ranging consequences, including storage issues, distribution delays, and tied-up cash flow. To avoid these challenges, we're seeing more brands than ever before being able to save the sale with stock from other store locations or distribution centers.



54% **of stores have endless aisle capabilities**

Checkout Challenges

Physical retail locations lose nearly $40 billion in potential sales each year from customers who don't want to wait for more than a few minutes in a checkout line. Despite this reality, only 16% of brands have rolled out a way to shore up those potential dollars with mobile checkout. Most associates are still tethered to traditional systems. Unfortunately, these brands will never be able to reap the full benefits of innovative checkout solutions like Tap to Pay on iPhone, which bring the point of sale directly to the customer.



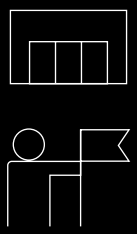
16% **of stores offer customers mobile checkout**

No Card, No Problem

The pandemic tipped the payments space from cash and checks to contactless cards and digital wallets. Additionally, in 2022, the industry was burdened by chip shortages. As a result, the volume of plastic cards issued went down, and the prominence of digital payments like Apple Pay and Google Pay went up. Consumers love the ease and convenience of a tap-and-go transaction, and 76% of brands are delivering. More adoption is likely to come as we progress toward a cashless and digital-first society.

76%

of brands offer contactless payments



HIBBETT SPORTS

SHOE CARNIVAL

PURE HOCKEY

SEPHORA

DULUTH TRADING CO.

The Customer POV

"I was told the online and physical stores were totally different."

"Store associates went to the back to check if items were in stock."

"Location is very traditional in that the associate needs to use a POS system for all tasks."

"Staff used an iPad and laptop to look up information and process payments."

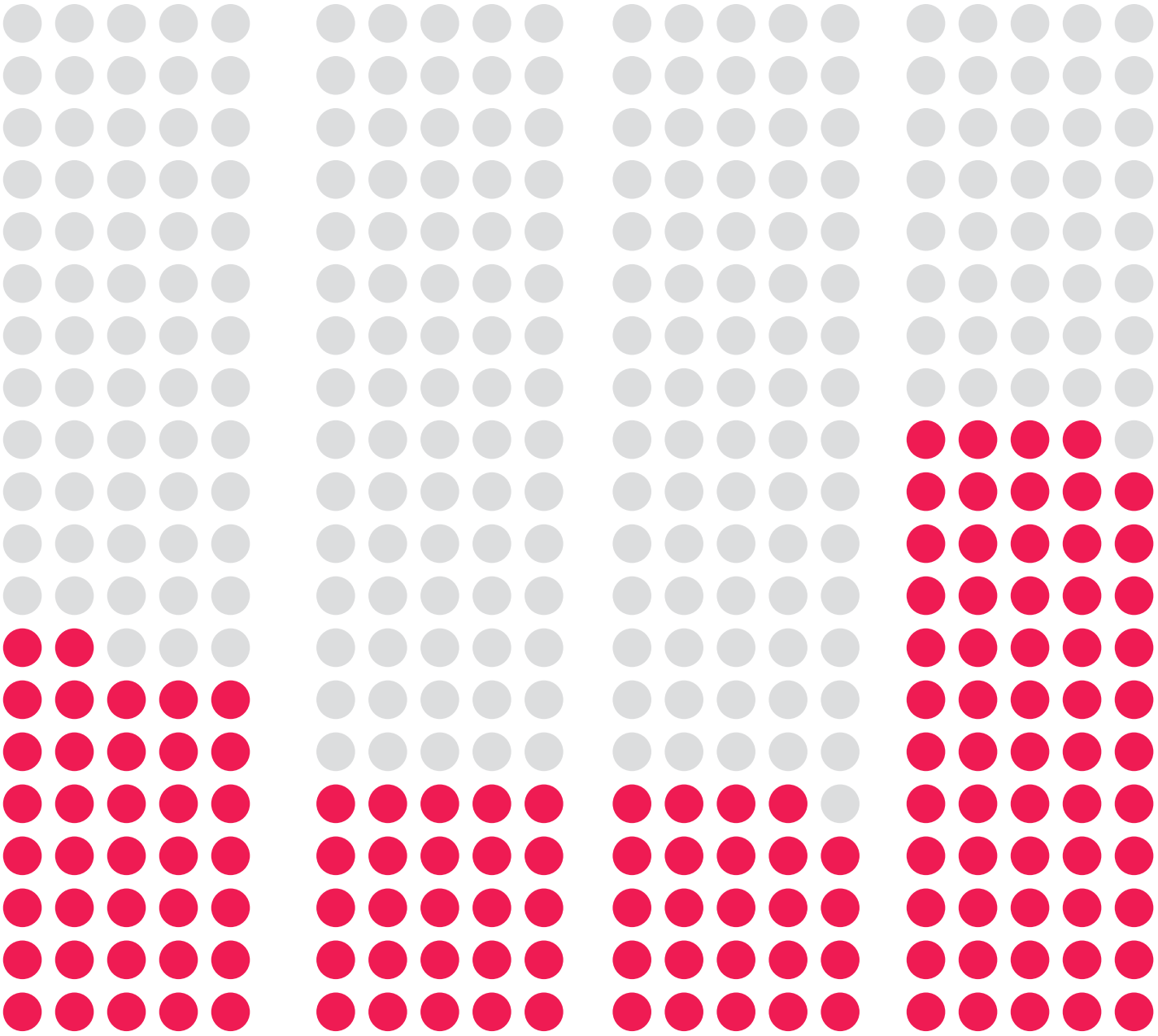
"Associates stood at the front door with iPhones and were ready to look up items if needed."

Our Take

Despite the widespread understanding of the role stores play in omnichannel, there are still many physical retail experiences that aren't seizing the opportunity. While this isn't the case for all store experiences, retail brands can't treat stores as standalone. They need to be fully integrated into the rest of the brand's portfolio, from giving a 360-degree view of a customer's shopping history to syncing available-to-sell inventory across the enterprise.

The same can be said for store associates. How can you elevate them from a simple salesperson to a trusted brand consultant? More importantly, what can you do to flip the perception of your store associates and the tools they use from "traditional" to modern? Modern doesn't have to mean gimmicky technology for technology's sake. Instead, it can mean having solutions that streamline processes and make every facet of the buying experience a joy. This is a far better perception for your store than simply looking good.

Associate Mobility



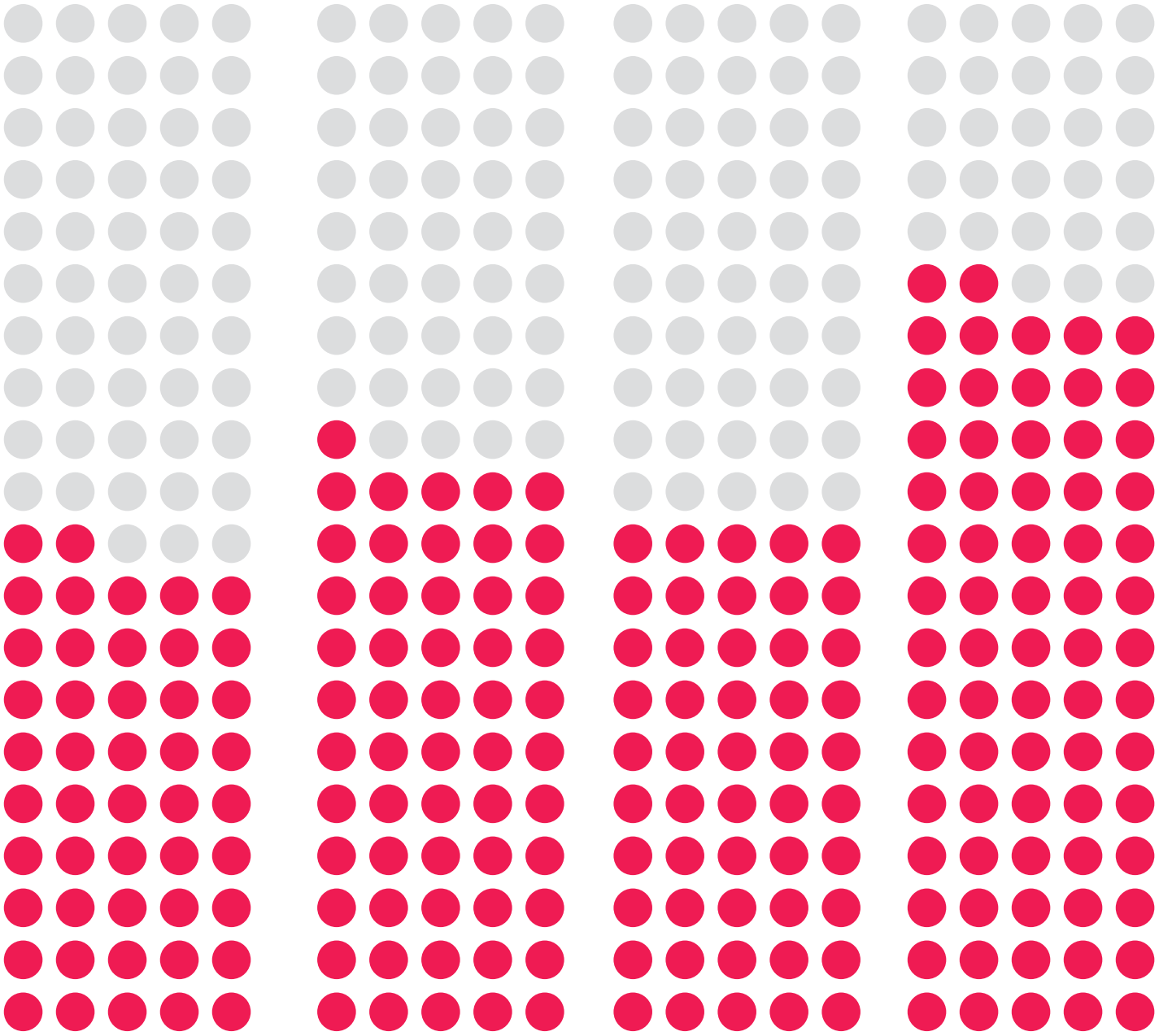
37% Basic

25% Mid-Market

24% Premium

59% Luxury

Endless Aisle



47%
Basic

56%
Mid-Market

50%
Premium

72%
Luxury

Conclusion

Uncertainty is the new normal. It may feel like retail has recently endured the worst, but more industry disruption is inevitable — economic, technological, societal, and governmental all included. With this in mind, it becomes obvious that brands have no choice but to invest in a scalable business model. Not in systems and services that will serve them in the present, but rather a foundation that won't crack under pressure in the future.

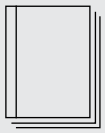
What we've seen up until this point for much of the retail industry is brands trying to optimize their experiences separately with siloed technology. While we live in the experience economy, retail isn't the sum of "online experience" plus "mobile experience" plus "store experience." Consumers see one brand and expect a consistent and connected journey across all touchpoints. So, maybe we're not talking about omnichannel as much as we are talking about omnibrand.

That might be semantics, but it's food for thought for all brands to consider in 2023. Another one: can you make change instead of enduring it? If you look at the Omnichannel Leaders in this report, one of the things they all have in common is that someone recognized change was needed, influenced the right people, and embraced a new status quo. What they can teach us is that there is no luxury in hindsight. Be a changemaker and move your business forward now.

Your Results

Want to know how your brand performed in the 2023 Omnichannel Leadership Report? We can produce a research presentation for you that includes:

1. Your overall score and data highlights
2. Your results compared to your segment and the industry
3. Anecdotal commentary based on our mystery shopping experience





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About NewStore

NewStore provides Omnichannel-as-a-Service for retail brands worldwide that want to accelerate their digital transformation. Built for speed and flexibility, NewStore allows brands to easily deliver amazing shopping experiences that store associates and consumers love. Its mobile-first, modular cloud platform includes POS, order management, clienteling, inventory, and native consumer apps. NewStore customers such as Burton, Faherty Brand, G-Star RAW, Marine Layer, Scotch & Soda, UNTUCKit, and Vince benefit from the most complete, global omnichannel retail solution available — now supercharged with Tap to Pay on iPhone. The company is backed by General Catalyst, Activant Capital, and Salesforce Ventures.

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Brand List

5.11 Tactical
7 for All Mankind

A

Abercrombie & Fitch
Academy Sports
Acne Studios
Adore Me
AERIE
Aeropostale
AG Jeans
ALDO
ALEX AND ANI
Alexander Wang
Alexis Bittar
Alice and Olivia
Allbirds
Allen Edmonds
alo yoga
Altar'd State
American Eagle
American Girl
Ann Taylor
Anthropologie
Arc'teryx
Ariat
Aritzia
Armani Exchange
Ashley Stewart
ASICS
Athleta
Aviator Nation
Avocado Mattress
AWAY

B

Backcountry
Banana Republic
Bandier
Bass Pro Shops
Bath & Body Works
Beach Bunny
Bed Bath & Beyond
Belk
Below the Belt
Ben Bridge Jeweler
Bergdorf Goodman
Bloomingdale's
Bluemercury
Boll & Branch
Bonobos
Boot Barn
Brandy Melville
Brighton Collectibles
Brooklinen
Brooks Brothers
Buck Mason

C

Cabela's
Calvin Klein
CAMPER
Canada Goose
Carhartt
Carolina Herrera
Carter's
Cavender's
Celine
Champion
Champs Sports
Chico's
Christy Sports
Claire's
Club Monaco
Coach
Cole Haan
Columbia Sportswear
Converse
Cos Bar
Cotopaxi
Crate & Barrel
Credo Beauty
Crocs
Cuyana

D

David Yurman
De Beers
Deciem
Delvaux
Design Within Reach
Dick's Sporting Goods
DKNY
Dooney & Bourke
DSW
DTLR
Duluth Trading
Dynamite Clothing

E

Eastern Mountain Sports
Eddie Bauer
Eileen Fisher
Elie Tahari
Empire
Etro
Evereve
Everlane
Everything But Water
Express

F

Fabletics
Famous Footwear
Fendi
Filson
Finish Line
Fjällräven
Fleet Feet
Foot Locker
Forever 21
Free People
Freebird Shoes
Fresh

G

GameStop
Gap
Garage
Glossier
GNC
Golf Galaxy
Golf Town
Gorjana
Guess? Inc.

H

Hammer Made
Harley Davidson
Harry Winston
Helly Hansen
HeyDay
Hibbett Sports
Hollister
Home Depot
Hot Topic
Hurley

I

Indochino
INTERMIX

J

J.Crew
J.Jill
J.McLaughlin
James Avery Jewelry
James Perse
Janie and Jack
Jimmy Choo
Jockey
Joe's Jeans
John Hardy
John Varvatos
Johnny Was
Johnston & Murphy
Journelle
Journeys

K

Kate Spade
Kendra Scott
Kiehl's
Kith
Krewe

L

L.L. Bean
L'Occitane en Provence
La Senza
Lafayette 148
Lammle's
Lands' End
Le Labo Fragrances
Levi Strauss & Co
Lids
Life is Good
Lilly Pulitzer
LOFT
LoveShackFancy
Lowe's
Lucky Brand Jeans
Lululemon

M

MAC Cosmetics
Macy's
Madewell
Manolo Blahnik
Marc Jacobs
Michael Kors
Missoni
Mitchell Gold + Bob Williams
Miu Miu
Monica + Andy
Moose Knuckles
Morphe Cosmetics
Movado

N

NARS Cosmetics
New Balance
Nike
Nordstrom
Oak + Fort

O

Oakley
October's Very Own
Old Navy
Oliver Peoples
Orvis
Oscar de la Renta

P

PacSun
Paige Denim
Pandora
Parachute Home
Patagonia
Paul Stuart
Peloton
Peruvian Connection
Peter Millar
PGA TOUR Superstore
Pottery Barn
Prada
Pseudio
Psycho Bunny
Pure Hockey

R

Rag & Bone
Ralph Lauren
Red Wing
Reebok
Reformation
REI
Reitmans
Restoration Hardware
Rhone
Richard Mille
RITUALS
Road Runner Sports
Roberto Cavalli
Rolex
Ron Jon Surf Shop
Rothy's
Rudsak
Running Room
Ruti

S

Saje
Saks Fifth Avenue
Sally Beauty
Sam Edelman
Samsonite
Saturdays NYC
Scheels
Sephora
Shane Co.
Shinola
Shoe Carnival
Shoe Palace
Skechers
SNIPES
Soft Surroundings
Source for Sports
Southern Tide
Spartina 449
Sperry
Splendid
St. John Knits
Stadium Goods
Stance
Steve Madden
Stone Island
Stoney Clover Lane
Stuart Weitzman
SuitSupply
Sundance
Sur La Table

T

Talbots
Tamara Mellon
Target
Tecovas
The North Face
The RealReal
The Vitamin Shoppe
Theory
Thom Browne
Tiffany & Co.
Tilly's
Timberland
Title Nine
Todd Snyder
Tom Ford
Tommy Bahama
Tommy Hilfiger
Tory Burch
Tradehome Shoes
Travis Mathew
Trina Turk
True Religion
Tuft & Needle
Tumi

U

ULTA
Under Armour
Uniqlo
Urban Outfitters

V

Valentino
Vans
Vera Bradley
Victoria's Secret
Vineyard Vines
Vitamin World
Volcom
Vuori

W

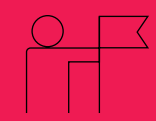
Walmart
Warby Parker
West Elm
West Marine
Williams Sonoma
Woolrich

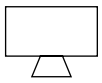
Y

YETI

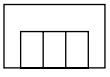
Z

Zumiez









" The impact of COVID on retail was unique (hopefully) and extreme. But one of the benefits that came out of this was an appreciation of retail, as well as more focus on the different channels available to shoppers, particularly when the largest channel - stores - was denied to us for so long. Now, more than ever, it is important for brands to provide a range of channels to their customers, allowing them to browse, engage, and buy on their own terms. Very easy to write in a sentence, but not so easy for many retailers to deliver effectively."

– IAN SCOTT, FOUNDER, IAN SCOTT RETAIL CONSULTING

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