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INTRODUCTION

Welcome to the first edition of the RetailX United States Growth 2000, which takes a new perspective on one of the world's largest and most exciting ecommerce markets. The size and spending power of the US market make this an obvious next step for retailers and brands around the world and in this report, we offer a new way of understanding what works for those that succeed here.

This builds on RetailX research into the US Top500 of leading retailers in the country. In future years, it will enable year-on-year comparisons around performance. This year acts as a foundation for that future depth of analysis.

This RetailX research represents a significant extension of more than five years of analysis of the UK and European markets. In this first year, it presents a Footprint listing of the largest Growth 2000 retailers selling in the US, while retail performance is then analysed through four Dimensions: Find, Social, Checkout and Delivery. These represent four key components of growth-driven retail that offer insights into the customer journey, from product discovery to the use of social, to payment at the checkout and then, finally, to fulfilment.

We look at the key features of the US ecommerce market and the economic context against which retailers trade in the strategic context. We illustrate our metrics with practical case studies that show what Growth 2000 members are doing to stand apart from the competition. Throughout, we use RetailX graphics to illustrate our findings. These graphics are available to reuse under licence and we encourage you to do so.

Ian Jindal, CEO and editor-in-chief, RetailX

SELLING TO AMERICA

The size and scale of the US ecommerce market offers a host of opportunities for growing retailers

As one of the world's largest ecommerce markets, the United States has a lot to offer to growing brands and retailers. Indeed, the sheer size and scale of the market makes it a favoured place to sell for businesses from around the world, whether they sell online only or through a multichannel approach that includes shops. Understanding who US shoppers are and how they prefer to buy is important for those looking to sell to its 334.7mn population, of whom 90% use the internet and 74% have shopped online, according to World Bank figures. But although this market is large and its people have a reputation for being willing to spend, it's not uniform. Federal law governs the way retailers can sell across the US, yet the regulations that govern selling online, from returns rules to tax rates, vary by which of its 50 states each ecommerce order is destined for.

This first annual US Growth 2000 listing – of the 2,000 largest retailers following on from the US Top500 – illustrates the breadth and depth of retail in the market. It's one in which retailers and brands from around the world – from the UK's New Look to Spain's El Corte Ingles, France's Castorama, Canada's Canadian Tire and the Philippines' Lazada – trade alongside homegrown businesses such as US Mattresses and Golden Eagle Coins. Almost two-thirds of traders listed in the index are based in the US but a significant 23% are headquartered in Europe. Growth 2000 businesses include specialist suppliers such as Pool Warehouse, for swimming pool owners, and Fitness Repair Parts selling spares for fitness equipment, while family businesses such as Nebraska Furniture Warehouse or tool company Rockler are another important part of the market.

Fashion is a key part of the market, with 27% of Growth 2000 members selling clothing, accessories or footwear, followed by consumer electronics (11%) and sports and leisure products (8%). Half of the US Growth 2000 are brands selling own label products, while 37% are retailers and 13% are marketplaces. But retailers see well over half (57%) of the traffic to these sites, followed by brands (31%) and marketplaces (12%).

Economic context

The US, like countries around the world, is emerging from the Covid-19 pandemic, during which its government spent strongly to support the economy. Spending has since returned to more usual levels. US GDP is expected to come in at \$25tn this year. Economic growth is now slowing, while growth in consumer spending has moderated, according to the OECD^[1], which expects that real GDP will grow by 1.8% this year, by 0.5% next year and by 1.0% in 2024. Core inflation is close to 5% (4.99%), above the long-term 2% target. In a note on the outlook for the US market published this month, the OECD predicts that inflation will play a role in cutting back spending plans across the economy, which will in turn weaken wage growth, while price pressures are likely to recede as energy prices stabilise and demand slows in line with the wider economy. However, inflation is expected to remain above target till 2024. Unemployment is currently at just under 4%, after rising close to 15% during the Covid-19 pandemic in 2020.

How US shoppers buy

The United States has a high level of online spending power, with US shoppers forecast to spend \$986.1bn online in 2022 – an average of \$3,700 each according to Statista. RetailX Consumer Observatory research further found that 46% of 500 US respondents to an online survey said they spent between \$12 and \$120 a week online, while almost a third (31%) spent between \$120 and \$300 online each month.

However, while shoppers do buy online – with more than a third (37%) shopping online more than once a week and a further 32% doing so at least monthly, according to RetailX Consumer Observatory research – there's also a preference for shopping instore. Statista analysis suggests that of those who buy across a range of channels, 25% favour online and 75% prefer to buy instore. That's supported by the finding that 20.6% of US retail sales took place online in the third quarter of 2022, according to Digital Commerce 360^[2]. Sales through all channels grew

STRATEGIC OVERVIEW

by 7.7% in the same period, with online sales growing by 10.8% and instore and other offline channels growing by 7%. It appears that mobile doesn't dominate US online spending the way it does in some other markets. According to Statista, 53% of US online shoppers prefer to buy via desktop, while 47% prefer mobile.

Asked why they buy online, price is the top reason, named by 78% of respondents to RetailX Consumer Observatory online research. Choice is named by 59%, convenience by 51% and delivery options by 47%. US shoppers are most likely to buy fashion clothing or accessories (54%) online, followed by books (39%) and consumer electronics (38%), while a third (33%) order online from supermarkets, according to RetailX.

When shopping online, bank cards (37%) are the most commonly used payment type, increasingly used via e-wallets (24%), while 13% favour direct debit payments, according to Statista. More than 90% of US shoppers expect free delivery within two to three days of ordering, according to McKinsey research^[3] – with one in five willing to pay slightly more in order to get faster shipping.

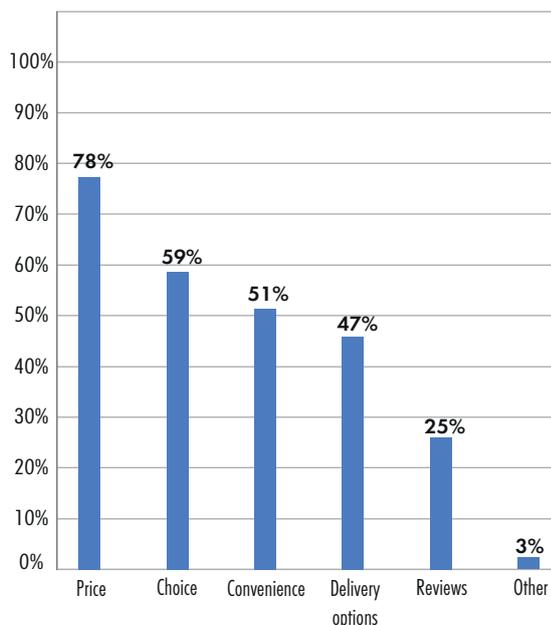
Buy online, pick up in store (BOPIS) – also known as click and collect – gained popularity as a fulfilment method during the Covid-19 pandemics as shoppers opted for kerbside pick-up options. Shoppers are most likely to have returned clothing orders (26%) in the last year, according to Statista^[4].

Black Friday hails from the USA, where it marks the day after Thanksgiving as the start of the festive shopping season. Over time, it has become a date with particular significance for online shoppers. Younger shoppers are among those most likely to have used social media for shopping inspiration when buying holiday gifts^[5], says Parcelmonitor, citing Statista, especially among GenZ (84%) and millennials (81%).

- [1] <https://issuu.com/oecd.publishing/docs/united-states-oecd-economic-outlook-projection-not>
- [2] www.digitalcommerce360.com/article/quarterly-online-sales/
- [3] www.mckinsey.com/industries/retail/our-insights/retails-need-for-speed-unlocking-value-in-omnichannel-delivery
- [4] www.statista.com/forecasts/997235/returns-of-online-purchases-by-category-in-the-us
- [5] www.parcelmonitor.com/insights/planning-for-peak-season-2022-ecommerce-shopping-trends-in-the-united-states

Figure 1. Why US shoppers buy online

Consumers' views on why they shop online



Based on 485 residents of the United States aged 18-64 who shop online, August 2022. Results are stratified by age and gender. Question: "Why do you shop online?"

Source: RetailX

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Vera Bradley

Paul Smith



AVON

Conn's

NATIVE

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THE EVOLUTION OF SEARCH

Rachel Tonner, head of product marketing at Klevu, considers how AI search is making it easier for shoppers to find what they're looking for



Do you remember Ask Jeeves? Way back in 1996, the search engine encouraged users to phrase their queries in the form of a question. The concept was ahead of its time. Twenty years, in fact. It wasn't until 2015 that Google launched its truly conversational updates, allowing users to get more relevant results when using natural language. Fast forward to today, we have an abundance

of information available to us, almost infinite choice, and high standards when it comes to searching in our natural voice.

According to Google, searches for "best affordable" have grown 60% globally year over year. With inflationary and supply chain pressures creating evermore cautious mindsets around spending, consumers are shopping less often, and being more thoughtful when they do.

Shoppers have realized that they have to be more specific in how they search in order to narrow down the vast options. Businesses that want to stay ahead need to understand the impact of search and discovery on conversion, and how the right tools can help them improve it.

Don't lose revenue over a dead end search experience

Shoppers will abandon the website if they are faced with a dead end like a zero results page. Instead of trying a new search, shoppers will simply think that the retailer can't meet their needs, or that the item they want simply isn't there. Yet oftentimes it is, but isn't surfacing.

One major challenge for Puma was just this – ecommerce search. The sportswear leader knew it needed to optimize search across its multilingual ecommerce portfolio to avoid 'no results' for customers. Puma integrated Klevu's search and merchandising software and realized huge benefits in multiple markets globally, including a 52% increase in search-led conversion and 60% direct-to-consumer ecommerce growth.

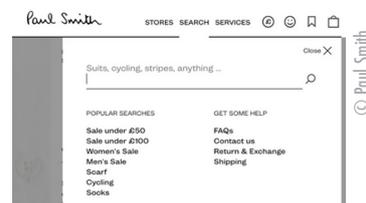
Consider these terms: "women's dress under \$100" or "top rated women's tops on sale". Klevu can understand that "best rated" has something to do with product reviews, that "on sale" refers to a reduced price, and that "under \$100" is a price filter. Cool, huh?

Make your search look sensational

Considering that people using a retailer's on-site search are four to six times as likely to convert than those who do not, encouraging the use of on-site search makes logical sense. Exposing the search bar in your main navigation encourages the use of search in the first place. For example, brands that use

Klevu have seen a 44% increase in orders from mobile search when exposing the search bar.

To stand out from your competition, you might also explain to your shoppers that you can search using complex descriptions. Paul Smith, for example, has literally told customers they can search for anything, including suggestions for popular searches such as price ranges.



Keep product recommendations fresh

Merchandisers can waste hours over-merchandising their stores only to realize that shoppers are digging for products a different way, searching, using filters and re-ordering. AI can help retailers create almost effortless customer-centric product discovery experiences that constantly refresh with trends and shopper behavior. As a result, visitors are inspired, and able to easily find what they're looking for – leading to higher conversion.

We've come a long way since Ask Jeeves. And really, today's AI innovations are only the beginning. What's clear from this research is that there's an opportunity for retailers to boost their revenue if they can ensure that people are able to find the product they want. First, optimize your on-site search experience to get as many shoppers using it as possible. Next, ensure that your on-site search engine is capable of showing relevant results whatever the query. Then, use the data from search, browsing behavior and purchases to influence product ordering and dynamic filters on product listings and recommendations. It sounds complicated, and it is. But it's easy with the right tools.



Millions of shoppers use Klevu to discover products on their favorite ecommerce sites. Klevu is an AI Search and Discovery Platform for ecommerce that elevates the search experience, and automatically re-merchandises category listing pages and product recommendations. Klevu's proprietary, game-changing technology delivers engaging product discovery experiences for shoppers, while simplifying operations for efficient ecommerce teams and developers. Schedule a demo or try for free at klevu.com.



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WHY MASTERING YOUR MARGINS IS KEY TO OVERCOMING ECONOMIC UNCERTAINTY

Callum Campbell, board member and former CEO at Linnworks, considers how retailers can best prosper in the current business climate



All signs point towards tough sledding ahead for retailers in 2023. With interest rates in the UK at 3% and hitting their highest levels since 2008 in the US, overarching economic pessimism means consumers will be a little more stingy with their spending. In the coming months, they'll be looking for better deals or holding off on purchases that can wait until the current climate

calms down. What does this mean for retailers and online sellers? That success will be found in the margins. Not only the actual margins on which your business is operating, but also the literal margin, or edge, of your current business practices.

Finding new opportunities

Where are you currently selling products? What channels are you currently not using but could be offering you additional revenue opportunities? While common sense would normally tell retailers to hunker down and shore up their position during economic uncertainty, the opposite is true in this instance for online sellers.

When done correctly, branching out and testing new sales channels will be an incredible asset for nimble retailers to ensure they are not missing out on opportunities. Compared to the golden age of bricks-and-mortar sales, expanding into new sales channels is a much easier, as well as more cost effective, process than it used to be.

With the right ecommerce software tech stack, retailers can easily list products on new channels, track orders and see in-depth reporting to understand whether a new channel is driving sales and repeat business. If not, said new channel listings can easily be removed with no harm done. But if the new channel shows promise, more resources can be deployed behind your listing efforts.

Whether net new listings provide merely a sprinkle or downpour of orders, the added benefit of channel diversification is the ability to stay nimble as unpredictability looms. Price

sensitive shoppers, bargain-hunters and word of mouth can all quickly sway momentum any which way and the retailers that already have a stake in the ground, or who are responsive enough to adjust on the fly, will be able to reap the benefits.

Refining your current practices

Now let's look at the more traditional business margins. Profit margin is at the top of the list of obvious reasons but other metrics can help you as well, such as lifetime customer value and total repeat business. Again, while it might seem counterintuitive during the current business climate to offer stellar introductory discounts to new customers, doing so with a clear plan to reap more long-term gains from these same customers could be a solid option for retailers with the flexibility to do so.

Another viable option is for brands to double down on their post-sale experience. Whether you've actively been nurturing customers since day one or you just have a list that gets email blasts occasionally, getting predictable returns from your past customers can help you strategically navigate through economic uncertainty and help you supplant potential losses in new revenue from a lack of demand.

The road ahead is anything but certain. What is clear is that companies that are able to be nimble with key processes, and deploy the right technology, will have the ability to test, learn and adjust to the changing conditions



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THE RETAILX US GROWTH 2000

These are the US retailers and brands that follow the RetailX US Top500, in alphabetical order within clusters. Clusters in this list are based on the Footprint Index, which measures retailers' size and significance by revenue, web traffic and stores.

Largest 100	MUSICIAN'S FRIEND	YARNSPIRATIONS	ECOBEE	MCLAREN	TRADESY	BLUESTONE PERENNIALS
2ND SWING	MY FONTS	YVES ROCHER	ENTERTAINMENT EARTH	MEJURI	UNCOMMON GOODS	BOLT DEPOT
4 WHEEL PARTS	MYNTRA	LA Z BOY	EREPLACEMENT PARTS	MOBILE FUN	UNIFORM ADVANTAGE	BOOT BARD
AMD	NASM	Largest 250	ETHAN ALLEN	MONOPRICE	UNIQUE-VINTAGE	BOXED
APMEX	NASTY GAL	1800 CONTACTS	FAST GROWING TREES	MOOSEJAW	VICI	BRAMBLE BERRY
ARBONNE	NEBRASKA FURNITURE MART	1800 PET MEDS	FAT QUARTER SHOP	MOTOSPORT	VISION DIRECT	BRANDFORD EXCHANGE
AUDIBLE	NUTRI SYSTEM	1ST DIBS	FINE ART AMERICA	NEW BALANCE	WINDSOR WOMEN'S CLOTHING	BRILLIANT EARTH
AUGUST	NUTS	5.11 TACTICAL	FIRE MOUNTAIN GEMS AND BEADS	NEW LOOK	WOB	BRYLANE HOME
BACKSTREET MERCH	PARTSTREE	ACME TOOLS	FLEET FARM	NEW YORK AND COMPANY	YANDY	BURKE DECOR
BALLARD DESIGNS	PATAGONIA	ACRONIS	FROM YOU FLOWERS	NINE WEST	ZAFUL	BURPEE
BLAIR	LA PERLA	ADORE ME	FRONTGATE	NINTENDO	ZUMIEZ	CALENDARS
BLINDS	PERSONALIZATION MALL	AEROPOSTALE	GARDENS ALIVE INC / BRECK'S	NOTONTHE HIGHSTREET	Largest 500	CALLAWAY
BONOBOS	PGA TOUR SUPERSTORE	AIRGUN DEPOT	GENERAL ELECTRIC COMPANY	NVIDIA	1 STOP BEDROOMS	CAMP CHEF
BOOSTMOBILE	PIER 1 IMPORTS	AJMADISON	GLOBAL GOLF	OUTDOOR VOICES	1000BULBS.COM	CANDLE SCIENCE
BROOKLINEN	PROPERTY ROOM	AMAIN HOBBIES	GO PUFF	OYSHO	3DCONNEXION	CANYON
BROOKS	QUILL	AMWAY	GOLF GALAXY	PAPERLESS POST	4 WHEEL ONLINE	CASPER
BUDS	RARE SEEDS	ARC'TERYX	GOPRO	PARADOXPLAZA	99 RANCH MARKET	THE CATHOLIC COMPANY
CAMPING WORLD	RAYMOUR & FLANIGAN	ARHAUS	GRAB A GUN	PF CHANG'S	ABT	CATO
CANARY	REFORMATION	ARIAT	GRADIN ROAD	PURITAN'S PRIDE	ACER	CHAMPION
CCLEANER	RENT THE RUNWAY	BANG GOOD	GRIZZLY	RAY-BAN	ALIBRIS	CHRONO24
CHEAPER THAN DIRT	REPLACEMENTS	BERGDORF GOODMAN	GUNMAG	RC WILLEY	ALL POSTERS	COCA COLA
CHICO'S	ROCKLER	BIRKENSTOCK	HANNAFORD	LA REDOUTE	ALLEN EDMONDS	COLEMAN FURNITURE
COLE HAAN	ROVE CONCEPTS	BISSELL	HERMES	REJUVENATION	AMERICAN STANDARD	COSTWAY
COLUMBIA SPORTSWEAR	RS COMPONENTS	BLENDER	HMV	REPAIR CLINIC	ANKER	COUNTRY DOOR
THE COMPANY STORE	RUE LA LA	BONANZA	HOTEL CHOCOLAT	RIO GRANDE	ANNIE'S CRAFT STORE	CRATEJOY
DELTA FAUCET	SALLY	BOOKS A MILLION	HOTTER	RITUALS	ANOLON	CRAYOLA
DESIGUAL	SCENTSY	THE BOUQS CO.	IHERB	ROAMAN'S	APPLIANCE PARTS	CREATE AND CRAFT
DISPLATE	SCRAPBOOK	CATHERINES	JACKS SMALL ENGINES	ROCK BOTTOM GOLF	APPLIANCES CONNECTION	LE CREUSET
EA	SHWAN'S	CDW	JENNY CRAIG	ROGUE	APT DECO	CUB
EASTBAY	SNAP ON	CGTRADER	JENSONUSA	ROSS SIMONS	ASPINAL OF LONDON	CUTLERY AND MORE
ESALE RUGS	SPOONFLOWER	CHANEL	JJ'S HOUSE	RUNNIG WAREHOUSE	AUTOHOME	CYBER LINK
FCP EURO	STAPLES ADVANTAGE	CHRISTOPHER & BANKS	JOHNNY'S	RYOBI TOLLS	AVENUE	DEALEXTREME
FIVE BELOW	STRADIVARIUS	CLASSIC FIREARMS	JOSBANK	SAGE BOOKS	AVITO	DENNIS KIRK
FRESH DIRECT	STULLER	COLOURPOP	JOYBIRD	SELECT BLINDS	BALSAM HILLS	DERAMORES
GIVENCHY	SWANSON VITAMINS	COMPETITIVE CYCLIST	KATE SPADE	SEWING PARTS ONLINE	BARE NECESSITIES	DOVER SADDLERY
GOG.COM	TACKLE WAREHOUSE	EL CORTE INGLES	KEEN	SHOE CANIVAL	BASSETT	DROP
HIBBETT	TENNIS EXPRESS	COUPANG	KENDRA SCOTT	SHOPSTYLE	BEALLS FLORIDA	DWR
HOBBS LONDON	TGW	CURRENT	KENZO	SOFT SURROUNDINGS	BEAUTYLISH	E FAVOR MART
INVALUABLE	TORYBURCH	DALLAS COWBOYS	KEURIG	SPRING	BELLACOR	ELEMENT VAPE
J JILL	USBORNE	DFROBOT	KITCHENAID	STAMPIN'UP!	BELLROY	ELF COSMETICS
JM BULLION	VENUS	DICKIES WORK WEAR	KMART	STEEP AND CHEAP	BEN'S BARGAINS	EMERSON ELECTRIC CO.
JOCKEY	VERA BRADLEY	DIGIKEY	LAVISH ALICE	SUR LA TABLE	BETTER WORLD BOOKS	EMPIK
JP CYCLES	WEDDING WIRE	DO TERRA	LIFE EXTENSION	SEZANE	BIG 5 SPORTING GOODS	EPIC SPORTS
JTV	WEEKDAY	DOLLAR GENERAL	LUMENS LIGHT	TARGET SPORTS USA	BLAIN'S FARM & FLEET	ERIN CONDREN
THE LAKESIDE COLLECTION	WESTERN DIGITAL	DOLLAR SHAVE CLUB	MADE	TENNIS WAREHOUSE	BLENDTEC	EYECONIC
LYST	WHITE HOUSE BLACK MARKET	DOONEY & BOURKE	MAURICES	TEXAS INSTRUMENTS		FASTTECH
MARTHA STEWART	WINE.COM	DOVER STREET MARKET		TEXT BOOKS		FENDER
MATTRESS FIRM	WORTHPOINT	DUMMIES		TOAST		FILSON
MOEN		E-TRAILER				FIREBOX
MSC						FOOTACTION

FRANCESCA'S	LUCKYBRAND	RUE21	TK MAXX	ANNIE'S	CANVAS DISCOUNT	DISPLAYS2GO
FRED PERRY	MAC COSMETICS	RUGS DIRECT	TOMMY BAHAMA	APPSUMO	CASA DEL LIBRO	DMM
FRIGIDAIRE	MADEINCHINA	RURAL KING	TOMMY HILFIGER	ARROW	CASIO	DOCKERS
FTD	MAISONS DU MONDE	RUSH ORDER TEES	TOUCH OF MODERN	ARTBEADS	CATBIRD	DRESSBARN
GARDENER'S SUPPLY COMPANY	MANDARAKE	SAATVA	TOUCHOFCLASS	ASHAMPOO	CATH KIDSTON	DRIDEPOT
GEARBEST	MARMOT	SALOMON	TUPPERWARE	ASHLEY STEWART	CD UNIVERSE	DRJAYS.COM
GETTYIMAGES	MAVISTIRE	SCENT BIRD	UP LIFT DESK	AUCHAN	CDJAPAN	DUNELM
GIANT	MERCHBAR	SCREWFIX	VALUE CITY FURNITURE	AUDIOBLOCK	CHACO	E-CRATER
GIANT BICYCLES	MINIINTHEBOX	SEE'S CANDIES	VICTORINOX SWISS	AVASFLOWERS	CHARBROIL	E-MOVIE POSTER
GLOBAL INDUSTRIAL	MISS A	SERENA AND LILY	VINEYARD VINES	BALDOR FOOD	CHARLOTTERUSSE	EAST DANE
GLOSSIER	MOLTON BROWN	SHARK	VIONIC	BASEBALL SAVINGS	CHIC ME	EASTERN MOUNTAIN SPORTS
GMARKET	MONAT	SHARPER IMAGE	VITAMIX	BCBGMAXAZRIA	CHIC WISH	ECAMPUS
GREEN BAY PACKERS	MONEY METALS EXCHANGE	SHEET MUSIC PLUS	THE WALKING COMPANY	BEAUTIFUL HALO	CHRISTIAN LOUBOUTIN	EFIREPLACE STORE
GREEN MAN GAMING	MONTAIN HARD WEAR	SIGNATURE HARDWARE	WEBER	BEAUTY BAY	CHUBBIES	ELGIGANTEN
GURNEY'S	MONTGOMERY WARDS	SIMPLY TO IMPRESS	WEST MARINE	BEN SHERMAN	CITIZEN	EMBROIDERY DESIGNS
GYMSHARK	MOUSER	SKATE WAREHOUSE	WHIRLPOOL	BENCH MADE	CITY	EMP
H MART	MUSIC.163	SLEEP NUMBER	WINZIP	BETABRAND	CLASSIC FOOTBALL SHIRTS	ESHAKTI
HALF PRICE BOOKS	MY PILLOW	SMYTHS TOYS	WOODCRAFT	BIBLIO.COM	CLEAR BAGS	ETAM
HANES	NATURALIZER	SMYTHSON	WOODLAND DIRECT	BIKE TIRES DIRECT	CODIBOOK	EVERYTHING5 POUNDS.COM
HAUTE LOOK	NAUTICA	SNAPPFISH	YEEZY	BIOLITE	COLEMAN	EXTREME DIGITAL
HAVERTYS	NET32	SPANX	ZZOUNDS	BLACK DIAMOND	CONCEPT2	EZ COSPLAY
HAYNEEDLE	NEWCHIC	SPEEDO	Largest 1000	BLOOM NATION	CONNS	FABRIC GURU
HEM	NFL SHOP	SPENCERS	1-800 BASKETS	BLUDOT	CONRAD	FABRICUT
HOKA	NOVICA	SPORTYS	2MODERN	BLUEFLY	COOLSTUFFINC	FACTORY DIRECT CRAFT
HUSH PUPPIES	OFFICESUPPLY.COM	STADIUM GOODS	3 BALLS	BOBS WATCHES	COTTON ON	FACTORY OUTLET STORE
J.W. PEPPER & SON	OLX	STANCE	360 CITIES	BODEGA	CPO	FAMILY DOLLAR
JELLYCAT	ON RUNNING	STELLA MCCARTNEY	AARON'S	BOLL & BRANCH	CRAZY FACTORY	FANATICAL
JERRY SARTARAMA	ONEPLUS	STOCKX	ACME	BOOHOO MAN	CROWN AWARDS	FARMGIRL FLOWERS
JOE'S NEW BALANCE OUTLET	ONLINE LABELS	STOKKE	ACNE STUDIOS	BOOKS.COM.TW	CUB CADET	FAT BRAIN TOYS
JOURNEYS	ONTHEHUB	STORENVY	AFLORAL	BOULANGER	CULT PENS	FERRARI.COM
JUSTICE	OSHKOSH B'GOSH	STUART WEITZMAN	AIM	BRAVEN	CUPSHE	FESTIVAL FOODS
K&L WINES	OTTERBOX	STÜSSY	AIRYDRESS	BRAVO COMPANY USA	DAILYSTEALS	FILTERS FAST
KINGUIN	OUTDOOR LIMITED	SUITSUPPLY	AKG	BREITLING	DAISO	FIRMOO
KITAPYURDU	OUTDOOR RESEARCH	SUNDANCE	AKIRA	BRIGHTON	DAKINE	FITNESS SUPERSTORE
KITH	PART SELECT	SUNSPEL	ALADIN	THE BRITISH MUSEUM SHOP	DARTY	FITZ AND FLOYD
KNIFECENTER	PARTS EXPRESS	SUPER BRIGHT LEDS	ALBEE BABY	BROWNING	DAVE & ADAM'S	FJALLRAVEN
KYGUNCO	PARTS GEEK	SWAP.COM	ALDO	THE BUCKLE	DAVID'S TEA	FLRYDAY
L.K. BENNETT	PAULA'S CHOICE	TACKLE DIRECT	ALITTLEMARKET	BUDGET GOLF	DAVID YURMAN	FOOTJOY
LANCASTER	PENZEYS	TACTICS	ALPHALETE	BUDK	DBRAND	FOR LOVE & LEMONS
LENS CRAFTERS	PLAYASIA	TANDY LEATHER	ALTRA	BUILD DIRECT	DECOR PLANET	FOREVER REDWOOD
LESLIE'S POOL	PLOW HEARTH	TATCHA	AMERICAN FLOOR MATS	BULK APOTHECARY	DEEP DISCOUNT	FORGEWORLD
LEVI'S	PROPER CLOTH	TAYLOR MADE	AMERICAN GIANT	BULK FREE SUPPLY	DESIGN CUTS	FORWARD
LILLY PULTZER	PROVEN WINNERS	TEMPURPEDIC	AMERICAN MEADOWS	BULLETPROOF	DESIGN TOSCANO	FRAGRANCEX
LIVE AQUARIA	PURAVIDA	TEVA	AMERICAN SCIENCE SURPLUS	BUNGIE	DESIGNER OPTICS	FRAMES DIRECT
LORD & TAYLOR	RAG & BONE	THIRD LOVE	AMERICAN SIGNATURE	BVLGARI	DHARMA TRADING	FREDERICK'S
LOREX TECHNOLOGY	RAINBOW	THIRTY ONE	ANALOG DEVICES	CAFEPRESS	DIGITAL STORM	FREITAG
LOVEPOP	RHINO SHIELD	THRIVE	ANCIENT-ORIGINS	CALLAWAY GOLF	DIGITEC	FROM JAPAN
LOVESAC	ROTITA	TIE BAR	ANGARA	CAMPSAVER	DIRECT VAPOR	
	RUBY LANE	TIGERDIRECT		CANADIAN TYRE	DISCOUNT MUGS	
					DISCOUNT RAMPS	

FRONTIER STORE	ICANVAS	LILYSILK	NYX	RAPHA	SPRINGFIELD	TURNTABLE LAB
FRYS	ICEBREAKER	LOGEE'S	PROFESSIONAL	RAZER	LEATHER	UBISOFT
FULL BEAUTY	IN THE SWIM	LOOK HUMAN	MAKEUP	REP FITNESS	COMPANY	UNIFI
FUNKY PIGEON	INDIAN WEDDING	LOVELY SKIN	O'NEILL	RESERVE BAR	SPRINKLER	UNIVERSAL
FURNITUREROW	SAREE	LOWES FOODS	OAKLEY INC	RHONE	WAREHOUSE	CYCLES
G-SHOCK	INDOCHINO	LUCKY GUNNER	OCADO	ROAD RUNNER	SPYDER CO	URBAN THREADS
G. H. BASS & CO	INLINE	LUCKY VITAMIN	OH POLLY	SPORTS	STARCITYGAMES	URBANDECAY
GAME	WAREHOUSE	LUCY IN THE SKY	OKA	ROCKABILIA	STARK BRO'S	US-MATTRESS
GAMEFLIP	INTERFLORA	LUISAVIAROMA	OMEGA	ROCKY	STATE LINE TACK	VANCLEEF
GARAGE	INTERMIX	LULULEMON	ONE KINGS LANE	MOUNTAIN	STAUER	&ARPELS
GERBER	INTIMISSIMI	MADISON REED	ONITSUKA TIGER	ATV MC	STEELSERIES	VAT19
GETFPV	INYO POOLS	MAJE	ONLINE METALS	THE ROOM PLACE	STEWMAC	VERTBAUDET
GHD HAIR	IROBOT	MALIBUSTRINGS	ONNIT	ROSE WE	STG	VESTIAIRE
GI AIRSOFT	ISLAND WATCH	MARINE ENGINE	OPAL	ROZETKA	STICKER MULE	COLLECTIVE
GINNY'S	IT COSMETICS	MARKETPLACE.TF	OPT	RTV EURO AGD	STYLEKOREAN	VG
GIRL SCOUT	ITALIST	MARYKAY	ORIGIN	SAATCHIART	SUN & SKI	VISION WORKS
GLASSES SHOP	IZOTOPE	MATTER	ORIGINS	SAILRITE	SPORTS	VIVINO
GLASSONS	JACK & JONES	HACKERS	OVERNIGHT	SAMS BEAUTY	SUPERBUY	WACOAL
GOGGLES4U	JACK RABBIT	MAYTAG	PRINTS	SAN RIO	SUPERDRUG	WACOM
GOLF DISCOUNT	JACKSON	MEDIEVAL	OWC, OTHER	SAUDER	SURFDOME	WAREHOUSE
GORJANA	AND PERKINS	COLLECTIBLES	WORLD	SAXO	SURUGA-YA	WEBHALLEN
GRACO BABY	JAMECO	MELISSA&DOUG	COMPUTING,	SAXX	SWEETGREEN	WEISSMANS
GRAYBAR	JANE	MEZCO TOYZ	PACKT	SCANDINAVIAN	SWIMOUTLET	WHITE FLOWER
GREETING CARD	JANSPORT	MICHIGAN BULB	PAGODA	DESIGNS	SWINSUITS	FARM
UNIVERSE	JD SPORTS	MILES KIMBALL	PAIZO	SCHIIT	THE SWISS	WHITE FOX
GRILL PARTS	JEFFREE STAR	MIRRAW	PANDA HALL	SEED SAVERS	COLONY	WHOLE LATTE
H-KING	COSMETICS	MITCHELL & NESS	PAPER MART	EXCHANGE	TARGET OPTICAL	LOVE
HALLEONARD	JEWLR	MIXBOOK	PARACHUTE	SEEDSMAN	TARTE	WHOLESALE
HALLOWEEN	JG SALES	MNML	PARK SEED	SEND FLOWERS	TASCHEN	MARINE
COSTUMES	JIMMYJAZZ	MODA OPERANDI	PAUL SMITH	SHABBY FABRICS	TCHIBO	WIGS
HAMMACHER	JOHN DEERE	MODANISA	PCCOMPONENTES	SHANECO	TE	WILSON
SCHLEMMER	JOHNSTON	MODESENS	PEAOPOD	SHEET MUSIC	TEAM USA	WOODSTOCK
THE HARDWARE	& MURPHY	MOMETRIX	PEARL IZUMI	DIRECT	TEE TURTLE	OUTLET
HUT	JOLSE	MONOPRIX	PEETS	SHEPLERS	TELEFLORA	WOODWIND
HARRY'S	JOSH'S FROGS	MORRISONS	PELICAN	SHI	THINGS	BRASSWIND
HEATONIST	JUMIA	MOTEL	PERSONAL	SHOEDAZZLE	REMEMBERED	X-KOM
HEIRLOOM ROSES	JUNEEES	MUSCLE &	CREATIONS	SHOPJIMMY.COM	THINX	YAKIMA
HELIX	JUST BATS	STRENGTH	PING	SHURE	THORNE	YOURS CLOTHING
HELLO MOLLY	JUVIA'S PLACE	MUSIC DIRECT	PIPINGROCK	SIERRA TRADING	THREADLESS	ZINIO
HELLY HANSEN	KEH CAMERA	MUSIC GO	PLUGIN	POST	TILE BAR	Largest 1500
HER ROOM	KENNETH W.	ROUND	BOUTIQUE	SIMON PREMIUM	TIMEX	100% PURE
HIGH COUNTRY	DORNEY	MY PATRIOT	PLUMBING	OUTLETS	TISSOT	11STREET
GARDENS	KILLSTAR	SUPPLY	SUPPLY	SIMPLEHUMAN	TOKOPEDIA	3 DSKY
HOBBYSEARCH	KITBAG.COM	MYCOMICSHOP.	POWELL'S CITY	SIMPLICITY	TOM FORD	3 RIVERS
HOMARY	KNOLL	COM	OF BOOKS	SIZE?	TOMS	ARCHERY
HOME AGAIN	KUHL	NA-KD	PPCS	SLUMBERLAND	TOURNEAU	4 SEATING
HOME ELEGANCE	LANCOME	NATIONAL	PRACTICA	SMASH WORDS	TOWER HOBBIES	9 ROUNDS
HOOVER	LAROCHE POSAY	BUSINESS	MACHINIST	SOCCER	TOYS R US	ABCAM
HOUSE OF	LAST BOTTLE	FURNITURE	PRICE CHOPPER	SONIC	TOYWIZ	ABLE AMMO
ANTIQUE	WINES	NATURALLYCURLY	PRO FLOWERS	ELECTRONIX	TRADE ME	ACEFITNESS
HARDWARE	LAZADA	NATURE HILLS	PRO VANTAGE	SOTHEYB'S	TRAXXAS	AIRGUNS OF
HOUSE OF CB	LEE	NEWARK	PROVIDENT	SPARTAN	THE TREE	ARIZONA
HOUSE OF	LEE VALLEY	ELECTRONICS	PROWRESTILING	MOTORS	CENTER	AIRSOFT
FRASER	TOOLS	NIHAO JEWELRY	TEES	SPEEDWAY	TRENDYOL	MEGASTORE
THE HOUSE	LEHMAN'S	NIKON	PRUSA	SPRING HILL	TROLLANDTOAD	AITAI KUJI
HUION	LENOX	NORDICTRACK	PURE FORMULAS	NURSERY	TROY BILT	AJIO
HYPixel	LENS.COM	NOTRE	PURE TALK USA	SPRINGFIELD	TUFT & NEEDLE	ALEX AND ANI
IBUY POWER	LIDS	NRS	PURL SOHO	ARMORY	TUMI	ALFRED DUNHILL
			RALLY HOUSE			ALL STAR HEALTH

ALPHA INDUSTRIES	BLINDSTER	COGGLES	ELDERLY	GLASSES	IMAGE SKIN CARE	MIANSAI
ALTE STORE	BLOOMS TODAY	COMPRESSION SALE	ELEKTRON	GLOBAL SOURCES	INFINEON	MISSOMA
AMERICAN FRAME	BLUE BOTTLE COFFEE	CONTACT LENS KING	ELEPHANT STOCK	GO GRAPH	INSTANTGAMING	MODANI
AMERICAN TIRE DEPOT	BOKUS	CONTRADO	ELITE FTS	GO KARTS USA	INTEX RECREATION CORP	MODLOFT
AMERISLEEP	BONHAMS	COOLER MASTER COMPANY	EMBROIDERES	GOAT	JABRA	MONCLER
AMI CLUBWEAR	BOOK BABY	CORKCICLE	ENASCO	GOLDEN EAGLE COIN	JACKSONARTS	MONROE AND MAIN
AMLEO	BOWERS & WILKINS	THE CPAP SHOP	ENCHROMA	GOLF BALLS	JAMESTOWN DISTRIBUTORS	MONSTER
ANDREW CHRISTIAN	BOWLING BALL	CRABTREE & EVELYN	ENEBA	GOOD'S HOME FURNISHINGS	JEWELRY SUPPLY JOSEPH	MOON VALLEY NURSERIES
ANN SUMMERS	BRABANTIA	CRAGHOPPERS	ENGLISH TEA STORE	GOODSMILESHOP	JUST FASHION NOW	MOREBEER
ANY PROMO	BRITISH CORNER SHOP	CREATE FOR LESS	ENVELOPES	GOT PRINT	JUVENTUS STORE	MOTOROLA
AO	BROAN-NUTONE	CROWD MADE	EONON	GOURMET GIFT BASKETS	KANE'S FURNITURE	MOVADO
APLIQ	BROOKLYN BEDDING	CRUMBS BREWING	ERICK'S	GRAHAM AND BROWN	KIARA SKY	MTD
ARCHITECTURAL DEPOT	BTOD	CULTURES FOR HEALTH	ESPECIALLY YOURS	GRASSCITY	KING SIZE	MURAD
ARKIV MUSIC	BUCK	CUSHION SOURCE	EVACUUM STORE	GREATS	KITCHEN SOURCE	MUSIC STORE
ASHFORD	BUGGIES UNLIMITED	CYMAX	FACTORY AUTHORIZED OUTLET	GROW ORGANIC	LANG	MY NAME NECKLACE
ASHTON DRAKE	BULK BOOK STORE	DAINESE	FAIRY SEASON	GRUNT STYLE	LARRY BROWN SPORTS	MYVAPORSTORE
ASTRO	BUSHNELL OUTDOOR PRODUCTS	DAN'S COMP	FAN JOY	GUDRUN SJODEN	LAZY OAF	NALLI
ATHLEAN X	BUYDIG	DANBURY MINT	FANS EDGE	HALFORDS	LDLC	NATIONAL AUTOMOTIVE PARTS ASSOCIATION
AUDIO ADVICE	CABLE MOD	DARAZ	FATHEAD	HAPPIEST BABY	LEAP FROG	NATURE HOME
AUKEY	CALICO	DAVE'S GUITAR SHOP	FERNS N PETALS	HARPERCOLLINS PUBLISHERS	LEATHERMAN	NATURE MADE
AUTHENTIC WATCHES	CALPHALON	DE GRUYTER	FIFTY FLOWERS	HAWES & CURTIS HEAD	LEFT LANE SPORTS	NBEADS
AVEDA	CALZEDONA	DECOR STEALS	FIRESTAR	HEADCOVERS	LEVENGER	NERD OR DIE
BACK WATER REPTILES	CAMP MOR	DELPHI GLASS	FIRST BOOK MARKETPLACE	HEALTH WAREHOUSE	LIQUOR & WINE OUTLET	NETRITION
BACKMARKET	CANADA GOOSE	DEMON TWEAKS	FIRSTORY	HEARTLAND AMERICA	LIVERPOOL	NUDIE JEANS
BAILEY'S	CANCER RESEARCH CENTER	DESIGN BY HUMANS	FISKARS	HIGHLAND WOODWORKING	LLL REPTILE	OLIVER BONAS
BAIT	CARD COW	DESIGNBOOM	FLANNELS	HIPSTAMP	LOCANTO	ONEIDA
BALI BLINDS	CARD HOARDER	DESSY	FLESH LIGHT	HOBBYCRAFT	LONG WOOD GARDENS	ONLY NATURAL PET
BANDICAM	CARDCASH	DESTINATION LIGHTING	FOAM FACTORY	HOBBYLINC	LORO PIANA	OPTIMUM NUTRITION
BANYAN BOTANICALS	CARPARTS.COM	DIRECT GARDENING	FOCUSRITE	HOBBYLINK JAPAN	LOUNGE	ORBIT
BAPE	CASTLERY	DISCOUNT FILTERS	FOOD SAVER	HOLLAND & BARRETT	LOVELY WHOLESALE	ORTHOTIC SHOP
BATTERY JUNCTION	CASTORAMA	DIVATRESS	FOOTASYLUM	HONEST	MADISON SEATING	OUTDOOR GEAR EXCHANGE
BE PREPARED	CBAZAAR	DK OLDIES	FORBIDDEN PLANET.COM	HOOKAH-SHISHA	MAGGARD RAZORS	PACKERS PRO SHOP
BEATS BY DR. DRE	CENTRAL VAPORS	DMARKET	FOSSILERA	HORNBACK	MANCHESTER UNITED	PACT
BEBE	CHARLES & KEITH	EL DORADO	FRESH WATER SYSTEMS	HOUSE OF NAMES	MANGO OUTLET	PALACE SKATEBOARDS
BEDDY S	CHARLES AND COLVARD	DR. FUHRMAN	FRONT RUNNER	HUDSON'S BAY	MAP MY RUN	PAPER WISHES
BELFORT FURNITURE	CHAUMET	DREAMTIME REACTIONS	FULL COMPASS	HUEL	MARGARET HOWELL	PARTSTOWN
BELL FOREST	CHINESE LAUNDRY	DUNE LONDON	FURNITURE PICK	HUMANS SCALE	MARIA B	PATIO LIVING
BELLELILY	CHOW SANG SANG	DUNGEON MASTERS GUILD	GAINESVILLE COINS	HUSQVARNA	MARINE DEPOT	PEEPERS
BERETTA	CHURCH'S	EAGLE CREEK	GALERIES LAFAYETTE	THE HUT	MASTERBUILT	PEN CHALET
BERLUTI	CHUU	EATALY	GAMEFLY	I HEART DOGS	MATRIX GAMES	PENGUIN MAGIC
BERNIE & PHYL'S	THE CITIZENRY	EBAGS	GARDER WHITE	IAMS	MAXPEDITION	PERFORMANCE BIKE
BERRIES	CITY CHIC	EBBETS	GARRETT WADE	ICING	MCM	PERIGOLD
BGASC	CLAS OHLSON	EBUYER.COM	GENTLE MONSTER	IHEAR TRAVES	THE MEASURED MOM	PERNIA'S POP-UP-SHOP
BIG BASKET	CMS	EDEN FANTASYS	GIBSON	ILGUFO	MEPHISTO	PET CARE RX
BIG Y	COASTAL	EERO	GIFTS FOR YOU NOW			PET FLOW

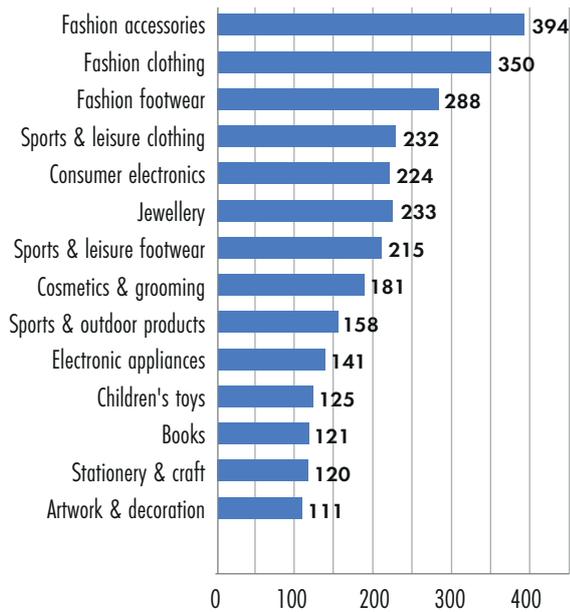
PETER THOMAS ROTH	SHOWPO	TIM HORTONS	WIG OUTLET	BA&SH	CENTURY	DUCK DONUTS
PHILOSOPHY	SIGNS	TIMELESS SKINCARE	WIG TYPES	BABYBJORN	CHEF KNIVES TO GO	DUDEN
PLANET OF THE VAPES	SIMMS	TITLE BOXING	WILDBERRIES	BADASS GLASS	THE CHELSEA MEGASTORE	DUSTY GROOVE
PLAYFUL PROMISES	SKINIT	TITLEIST	WILKO	BAG BORROW OR STEAL	CHELSEA FOOTBALL CLUB	DXL GROUP
PLAZA JAPAN	SKULLCANDY	TOBI	WINE INSIDERS	BANG & OLUFSEN	THE CHIVERY	E MEDALS
PLUGIN ALLIANCE	SMALL RIG	TOMMIE COPPER	WISHTREND	BANNER BUZZ	CLUB MONACO	EARGO
POKEMON CENTER	SMARTBUY GLASSES	TONY ROBBINS	WITHINGS	BATTERY MART	CM ALMY	EASTON PRESS
POLAR	SMARTWOOL	TOO FACED	WOLFERMAN'S	BATTLBOX	COGNITIVE SURPLUS	EASY BREATHER
POLYCONCEPT NORTH AMERICA	SMOKETECH	TOOL BARN	WONA TRADING	BEAUTY EXPERT	COLES	EGO
POND GUY	SNEAKERSNSTUFF	TOOLS PARTS DIRECT	WOOLWORTHS	BEDDING INN	COMPACT ALLIANCE	ELEFANT
POOL WAREHOUSE	SOG	TOOLSTATION	WORLD SOCCER SHOP	BEL FURNITURE	CONCORDIA SUPPLY	ELKJOP
THE POPCORN FACTORY	SOLE FITNESS	TOONTRACK	WORTHINGTON DIRECT	BELL (CA)	CONTINENTE	ELLOS
POWER SYSTEMS	SOURCE BMX	TYTY	Y LIGHTING	BEN BRIDGE	COOKIES BY DESIGN	ELUSIVE DISC
PRO AUDIO STAR	SPECK	UNIEURO	YESASIA	BENTO & CO	COTSWOLD OUTDOOR	EMOTIVA AUDIO CORPORATION
PROFORM	SPECSAVERS	UNITED STATES FLAG	YOUNIQUE	BERNARD WATCH	COOLBLUE	EMPIRE WINE
PROM	THE SPICE HOUSE	UNIVERSAL	ZOX	BETTY ROCKER	DAEDALUS BOOKS	ENLIGHTENED EQUIPMENT
PUBLIC DESIRE	SPORT RX	UNIVERSAL AUDIO	ZURI	BIBA	DADDIES	ERA GEM
QUEST	SPORTCHEK	UNIVERSAL RADIO	Largest 2000	BIKEBERRY	DAEALUS BOOKS	ERICDRESS
RACK ATTACK	SPORTS MEMORABILIA	UPPABABY	1INK	BIKEINN	DANGDANG	EVANNEX
RADIO SHACK	SPORTSSHoes.COM	URBAN FARMER	310	BIZ CHAIR	DANGERFIELD	EVANS CYCLES
RAND MCNALLY	STACKSOCIAL	URBAN INDUSTRY	3DEXPORT	BLACK LIBRARY	DAVE'S COLLECTIBLE COINS	EVE'S ADDICTION
THE RANGE	STAR FURNITURE	US APPLIANCE	ACORN	BLACKMILK	DECAL GIRL	EVERLAST
REICHELT ELEKTRONIK	STAR WARS	USGA	ADVANCED BIONUTRITIONALS	BLAIR CANDY	DECORATIVE FABRICS DIRECT	EVERPRESS
REPRESENT	STARBIKE	UTSAV FASHION	AFRICA IMPORT	BLAZING BOOST	DEL CITY	EYEGLOSS WORLD
REV A SHELF	STARWEST BOTANICALS	VANISHING INC	ALEXANDALEXA.COM	BLINDS TO GO	DELMAR FANS	FABINDIA
RIMOWA	STELLA DOT	VAPORDNA	ALEXANDER WANG	BLINQ	DELONGHI	FACTORY CHRYSLER PARTS
RIPNDIP CLOTHING	STH SWEET	VAPORFI	ALIMED	BLISS WORLD	DERMAE	FAIRFIELD COLLECTIBLES
ROYAL QUEEN SEEDS	STOP AGING NOW	VARUSTELEKA	ALKOSTO	BLT	DESIGN FOR HEALTH	FALABELLA
RUBBER STAMPS	STORZ & BICKEL	THE VAULT PRO SCOOTERS	ALLUREZ	BOCONCEPT	THE DETOX MARKET	FALCON-NW
RUFF WEAR	STRUCTUBE	VEJA	ALO YOGA	BONNIE PLANTS	DIADORA	FASHIONABLE CANES
RUNNINGS	SUPER HERO STUFF	VELVET CAVIAR	ALWAYS FITS	BRIGHTER BLOOMS	DIESEL POWER GEAR	FC BARCELONA
SADDLEBACK LEATHER CO	SUPER JEWELER	VENUM	AMARA	BROOKSTONE	DIPTYQUE PARIS	FC BAYERN MUNICH
SAFER WHOLESALE	SUPERMARKET ITALY	VERKKOKAUPPA.COM	AMERICANAS.COM	BULLION VAULT	DIRECT DOOR HARDWARE	FISHPOND
SALVATORE FERRAGAMO	T.M. LEWIN	VIDA	AMES WALKER	BUMBLE AND BUMBLE	DIRECT HOME MEDICAL	FITNESS REPAIR PARTS
SATURN	TAKEALOT	VILLAGE HAT SHOP	ANGELUS DIRECT	BUNNINGS	DOUGLAS	FOAMORDER
SCHOOL OUTFITTERS	TANGA	VINTAGE KING	APTEKA	BURT'S BEES	DREAMLAND JEWELRY	FOR YOUR PARTY
SCHWINN BIKES	TANISHQ	VIVO BAREFOOT	ARCADIA PUBLISHING	BUY GOODS	DREAMS	FOREVER LIVING
SCOTCH & SODA	TAOTRONICS	VOLT	ARKON	CAMERA READY COSMETICS	DRESSLILY	FORMLABS
SCUF GAMING	TARGET PHOTO	WALLPAPER WAREHOUSE	ARMITRON	CANADA COMPUTERS & ELECTRONICS		FOSTER GRANT
SEARS HOMETOWN STORES	TEEFURY	WARMOTH	ARMOR-X	CANVAS ON SALE		FRANK AND OAK
THE SHADE STORE	TEMPERLEY LONDON	WATHMAXX	ART OF PLAY	CARATLANE		FRATELLO
SHARK ROBOT	TENNIS POINT	WAYTEK	ASIAN PAINTS	CASEABLE		FRED MEYER JEWELERS
SHOP THE PIG	TETON GRAVITY RESEARCH	WEEKENDS ONLY	ASSOCIATION OF CERTIFIED FRAUD EXAMINERS	CASEKING.DE		FRONT POINT
	TEXTBOOKX	WEST COAST SHAVING	ASSOS	CAT		FRUUGO
	THEORY	THE WHISKY EXCHANGE	ATLANTIC BRITISH LTD.	CATAWIKI		FUNLA
	THEYETEE	WHISTLES	ATOMIC AVENUE	CDON		FURNITURE CART
	THOMAS SABO	WHOLESALE7	AUTO MOTIX	CELLULAR OUTFITTER		
	THREAD	WICKED WEASEL	AUTOCLICITY	CENTRE OF EXCELLENCE		
	THULE GROUP		AZA			
	TIGER MIST					

FUTON LAND	JOHNSON FIT	MISTSHOP	OOFOS	THE RADAVIST	SIMPLI HOME	VIA TRADING
G BASE	JOULES	MODEL TRAIN STUFF	OPEN TIP	THE RAKE	SIMPLY BE	VILLA
GAIA HERBS	KABUM!	MODELLS	OPINEL	RAV POWER	SIMPLY STAMPS	VINE PAIR
GAIAM	KARMALOOP	MONTEREY BAY SPICE COMPANY	OPTI CONTACTS	RAZOR	SIVASDESCALZO	VIPSHOP (VIP.COM)
GALISON	KASPERSKY	MORELE.NET	THE ORDINARY	RCMART	SKIPHOP	VIRALSTYLE
GAMMA	KC TOOL	MOUNTAIN CREST	ORGAIN	REAL TREE	SMARTFURNITURE	VIVE
GANNI	KEN'S SEWING CENTER	MOUNTAIN DEW	ORIGINAL BOTANICA	REDWOLF AIRSOFT	SOFAS AND SECTIONALS	VMINNOVATIONS
GARDENS ALINE	KHAADI	MOUS	ORTHO	REHAB MART	SOLE TRADER	VOGUE WINGS
GEM SELECT	KINGSTON TECHNOLOGY CO.	MOVE DANCE	PACIFIC COAST	RELAX THE BACK	SOREL	VR COVER
GEMPORIA	KIPLING	MPB.COM	PALM BEACH JEWELRY	REVIVAL	SOUNDS TRUE	WAHOO FITNESS
GIESSWEIN	KOLE IMPORTS	MRS FIELDS	PANERAI	REVOLUTION BEAUTY	SOURPUSS	WALTER E. SMITHE
GIRLFRIEND	KOTSOVOLOS	MUIR SKATE	THE PAPERMILL STORE	RICK OWENS	SPHERO	WALTHERS
GLOBAL ROSE	KPOPTOWN	MUJI	PARTS PEOPLE	THE RIDGE	SPIGEN	WARNER BROS
GM PARTS GIANT	LABX	MURALS YOUR WAY	PAT MCGRATH LABS	RINGS THINGS	STEP2	WATCH GEEKO
GMPARTSNOW	LEONISA	MUSIC STACK	PATTERN BANK	RIPT	STOCKINGS HQ	WATCHFINDER & CO.
GOALZERO	LIGHT BULBS	MUSTO	PEAK DESIGN	RISHI TEA	STONE ISLAND	WATCHSHOP
GRIP6	LITTLE TIKES	MY BEER COLLECTIBLES	PENDLETON	ROBOT SHOP	STRATOSPHERE	WASTIVIN
GUL AHMED	LLOYDS PHARMACY	MY LOLITA DRESS	PENS	RODE	STRIVECTIN	WAYSIDE
HAMILTON BEACH	LOA	NAME BRAND WINGS	PEPPERMAYO	ROOTS	STUDIOSUITS	WHITE FLASH
HAUTE HIJAB	LOMOGRAPHY	NATIONAL ASSOCIATION OF WATCH & CLOCK	PERRICONE MD	ROSE GAL	STYLENANDA	WICKES
HAYMARKET BOOKS	LONGCHAMP	NATIONAL PARTS DEPOT	PET EDGE	ROUTLEDGE	SUMMER	WIGS BUY
HEALTH CABIN	LONGFIELD GARDENS	NATIVE	PET MOUNTAIN	RUBBERMAID	SUNING	WINE ACCESS
HEARTH SONG	LOOT CRATE	THE NATURAL SAPPHIRE COMPANY	PHANTEKS	RUSSELL STOVER	SUNNY SPORTS	WING STUFF
HEDELDS	LOVE BOOK ONLINE	NEW DIRECTION AROMATICS	PIMORONI	RUSTY ZIPPER	SUPER 7	WOOL AND THE GANG
HEMA	MAHARAM	NEW YORK DRESS	PINUP GIRL CLOTHING	RUTEN	SUUNTO	WOOL WAREHOUSE
HESSEN ANTIQUE	MAINGEAR	NEXT WAREHOUSE	PISHPOSH BABY	SA	SWISS WATCH EXPO	XIDAX
HITCHED.CO.UK	MAISON MARGIELA	NINJA	PISTILS NURSERY	SAFARI LTD	TAILOR STORE	YUNNAN SOURCING
HOME LIVING	MAKING COSMETICS	NIXON	PLAYBOY	SALTWATER FISH	TATA HARPER	Z NATURAL FOODS
HOMEBASE	MANDM DIRECT	NOBLE COLLECTION	POLAROID	SANDRO	TATE SHOP	ZADIG & VOLTAIRE
HONEY BIRDETTE	MARIMEKKO	NOON	POLITICS AND PROSE	SARRAF	TBDRESS.COM	ZALORA
HORNBY	MARK'S (CANADA)	NORTHLAND ALUMINUM PRODUCTS	THE POOL SUPPLIES SUPERSTORE	SAVE ON CRAFTS	TEA FORTE	ZIA RECORDS
HORSE.COM	MASSAGE WAREHOUSE	NOTEBOOKS BILLIGER	POOLSUPPLIES.COM	SAVORYS PICE SHOP	THE TEA SPOT	ZINGERMANS
HOT MIAMI STYLES	MASTER OF MALT	NYBG	POWER BLOCK	THE SCHOOL OF LIFE	THAT PET PLACE	ZOOPLUS
HUF	MATALAN	OBI	PRANA	SCHOTT	THOMPSON & MORGAN	ZOZOTOWN
ICOFINDER	MATT & NAT	ODEALO	PRECISIONROLLER	SCHWALBE	TIES	EMINENCE
IFSTA	MC COYS	OH! NUTS	PREDATOR NUTRITION	SCHWALBE	TOM DIXON	
IG VAULT	MEGA SPIN	OLD TIME CANDY	PRESTIGE TIME	SCOTT SPORTS	TOMTOM	
IGP	MEL AND ROSE	OLDIES	PRIMARK	SEED CITY	TORANI	
INCOLLECT	MELONBOOKS	OLYMPUS	PRO ACTIV	SEED SUPREME	TORANOANA	
INMOD	MENSUAS	ONLINE COMPONENTS	PROM GIRL	SEEDS HERE NOW	TRES BIEN	
INSPIRE UPLIFT	MERANOM	ONLINE FABRIC STORE	PROPSTORE	SEEED STUDIO	TURTLE BEACH	
IRREGULAR CHOICE	MERCHNOW		PS AUDIO	SEEKING HEALTH	TWISTED THROTTLE	
ISUNSHARE	MERCHOID		PUBLIC.GR	SELF-PORTRAIT	ULLA POPKEN	
J. LINDBERG	MFJ		PURE ROMANCE	SENA	ULTIMATE EARS	
JACK WILLS	MICROSOFT STORE		QUAD LOCK	SHARPENING SUPPLIES	UNIQSO	
JADED LONDON	MIDWEST GROW KITS		R&A CYCLES	SHERRI HILL	UPDATE STAR	
JAEGER-LECOULTRE	MISSION WINE & SPIRITS			SHISEIDO	VAGABOND	
JAPANESE KNIFE				SHOPAFL	VALENTINO	
JASCO PRODUCTS COMPANY				SIGN WAREHOUSE	VERMONT WOODS STUDIOS	
JEUNESSE				THE SILVER DOLL		
JIMMY BEANSWOOL				SILVER TOWNE		
JOHN SMEDLEY				SIMILAC		

ABOUT THE US GROWTH 2000

Figure 2. What the US Growth 2000 retailers sell

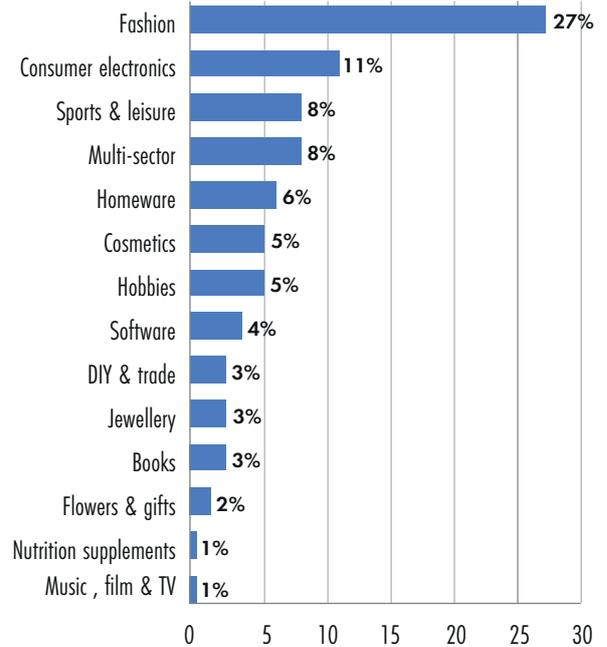
The percentage of retailers that sell a significant number of products in a category



Categories that include at least 110 retailers are shown. Note that some retailers sell in multiple categories
Source: RetailX

Figure 3. The primary sectors that Growth 2000 retailers belong to

The percentage of the US Growth 2000 retailers in key sectors

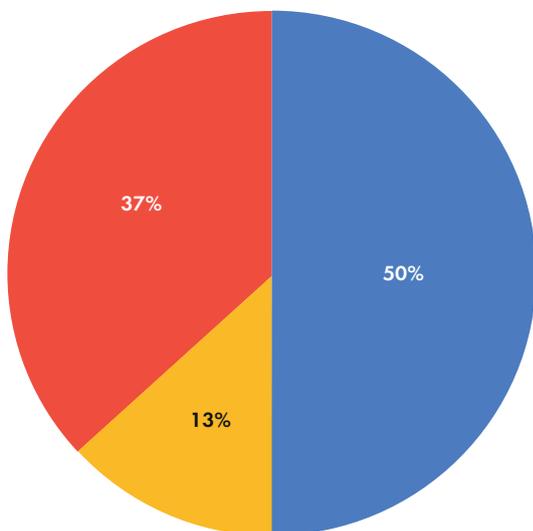


Source: RetailX

Figure 4. Business types of the US Growth 2000

The fraction of the US Growth 2000 retailers that are brands, which mostly sell own-label products; marketplaces, which host third-party sellers; and retailers

Brands Retailers Marketplaces

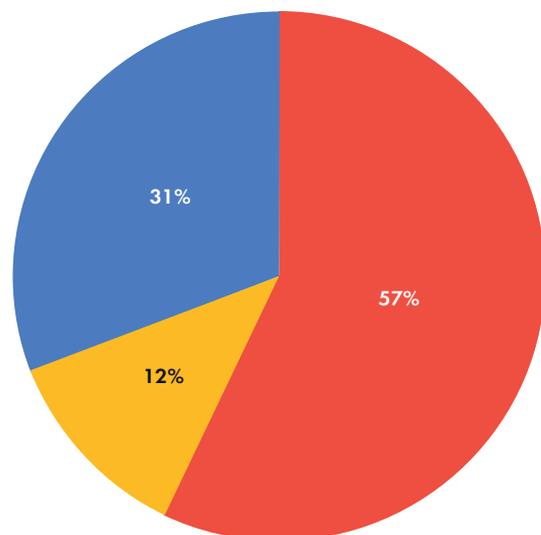


Source: RetailX

Figure 5. The split of US web traffic

The percentage of visits from US consumers to the websites of the Growth 2000, divided into brands, marketplaces, and retailers

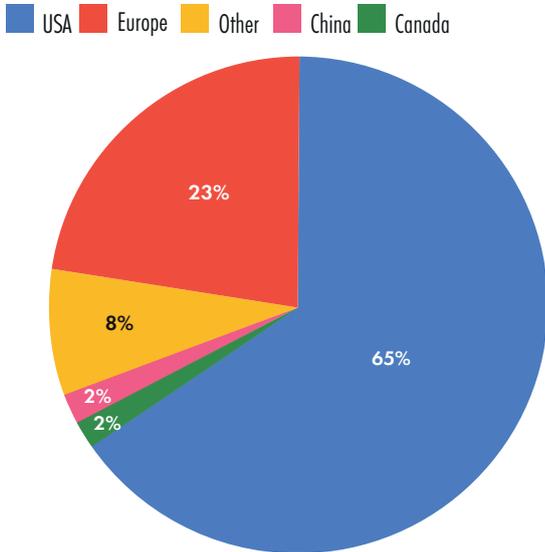
Brands Retailers Marketplaces



Brands are defined as retailers that mostly sell own-label products, and marketplaces as ecommerce websites that host third-party sellers

Source: RetailX

Figure 6. Where Growth 2000 retailers are headquartered

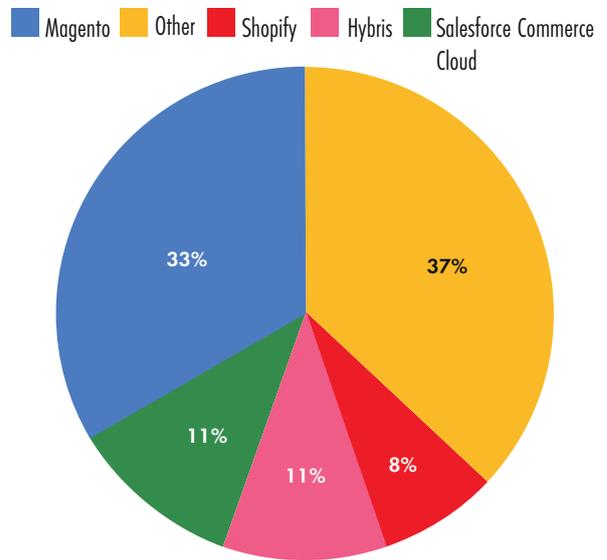


Note that we define 'headquarters' as where a company is practically headquartered, with offices and executives, which may differ from its legal domicile
Source: RetailX

RetailX 2022

Figure 7. Ecommerce platforms

Platforms observed on US Growth 2000 websites



Source: BuiltWith, RetailX

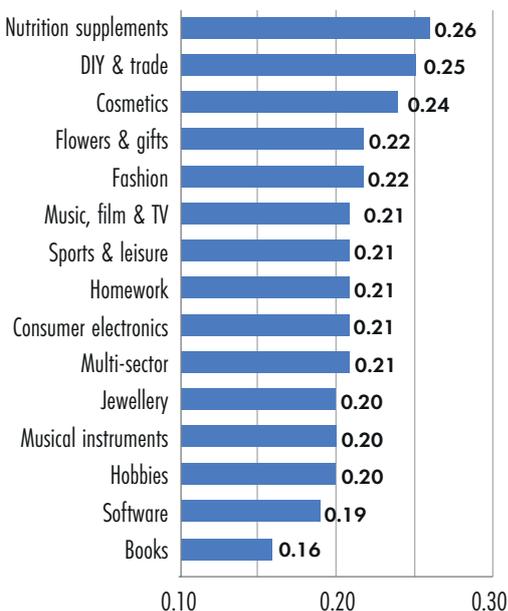
RetailX 2022

MEASURING PERFORMANCE

We score performance in tests to create an index value. The Total Index Value (TIV) is the sum of all companies' results while the Average Index Value (AIV) is the average company's result. These figures enable us to compare performance between years and sectors since a higher TIV or AIV represents a greater measured capability and performance. Our benchmarking reveals that performance has markedly improved in most areas in successive years

Figure 8. Average performance by sector

The Average Index Value of retailers in a sector

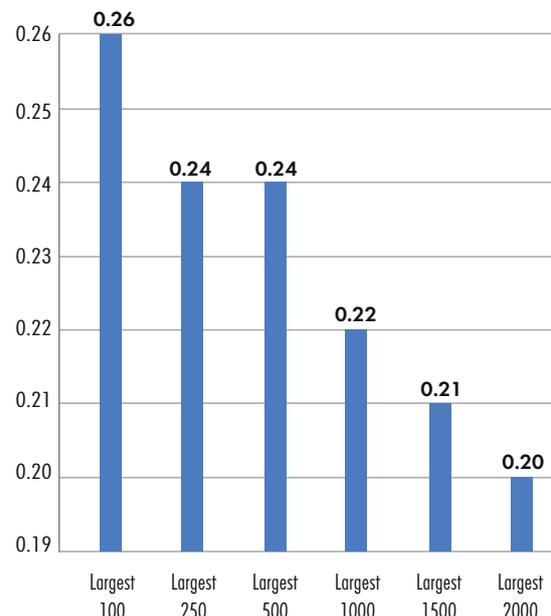


Source: RetailX

RetailX 2022

Figure 9. Cluster performance

The Average Index Value of retailers in a cluster



Source: RetailX

RetailX 2022

NAVIGATING COMMERCE

Retailers that stand out in the Find Dimension have websites that are easy to navigate and include features that make it easy to share products with others

The Find Dimension focuses on one of the key drivers of retail success – how easy it is to find the right product on a Growth 2000 website. It's the first step in the successful shopping journey both for shoppers who find the item they want to buy and for retailers making a sale.

Being able to find the right product is important to US shoppers, who go online in part for the wider range of goods available, according to RetailX Consumer Observatory 2022 research. This found that 52.8% of survey respondents gave choice as a reason for shopping online. It was the third-most commonly selected reason for shopping online, after convenience (79.8%) and price (61.0%). Product recommendations are also a key attraction for 24.3% of those that join retailer loyalty clubs. Product reviews make it either very (36%) or somewhat (52%) more likely that shoppers will buy online.

RetailX researchers assess performance in the Find Dimension first by looking at how easy it is to navigate a website and then how appealing that website is to shoppers – raising the likelihood of whether they will go on to look for the right product. Research also looks at whether visitors to a website can save a product for later or share it with friends – both potentially leading to a future sale.

HOW EASY IS IT FOR CUSTOMERS TO FIND THE RIGHT PRODUCT?

Ease of navigation

When shoppers can easily make their way through a website, whether in search of a specific product or browsing for inspiration, the chances are higher that they will be able to find an item they want to buy.

How easy a website is to navigate is, to an extent, a subjective metric. Multiple RetailX researchers rated ease of navigation using search, menus and filters, on a scale of zero to four and

the results were standardised. In 2022, the average score came in at 2.98 and the median at 3.0.

In the graphic on page 19, those scores have been converted into a score out of 100 – taking the average score of 2.98 to 73. By category, jewellers' websites were deemed the easiest to use to find products and information, with a score of 83 out of 100. Multi-sector websites scored 76, while fashion and sports and leisure (both 75), homewares (73) and cosmetics (70) were all particularly highly rated.

At the other end of the scale, retailers selling software had a lower rating of 56.

Visual appeal

Since shoppers are likely to judge a website by the way it looks, websites that are visually appealing are more likely to draw visitors in to take a further look.

As with ease of navigation, visual appeal is a somewhat subjective metric. Multiple RetailX researchers rate visual appeal on a scale of zero to four and the results are then standardised. The median retailer scores three points while the average retailer scores 2.99. The most variation is found in average scores, where cosmetics (3.41), sports and leisure (3.35), nutritional supplements (3.31) and fashion (3.25) retailers score more highly than those selling music, film and TV (2.66), DIY and trade (2.58) and software (2.88) products.

Share with friends

Shoppers can get a second opinion from a friend, or offer a family a recommendation through sharing products via email or social media. More than a third (37%) of retailers enable shoppers to share a product they found with friends, via social media such as WhatsApp or Twitter. Shoppers buying from US Growth 2000 websites are most likely to be able to do this from a DIY or trade website, since all of the DIY and trade retailers assessed in the analysis supported this. That's closely followed by those buying on multi-sector websites (98%) and

FIND

hobby websites (95%), while 83% of cosmetics retailers support this functionality.

It is less commonly found on brand (75%) and homewares (77%) websites.

Save to list

When visitors to a website find a product they might consider buying they can save it for later, or share it with friends and family via a wishlist. 40% of retailers analysed enable shoppers to save their favourite finds to a wishlist. 53% of fashion retailers do so, followed by brands (39%). However, those selling consumer electronics do not tend to offer wishlists.

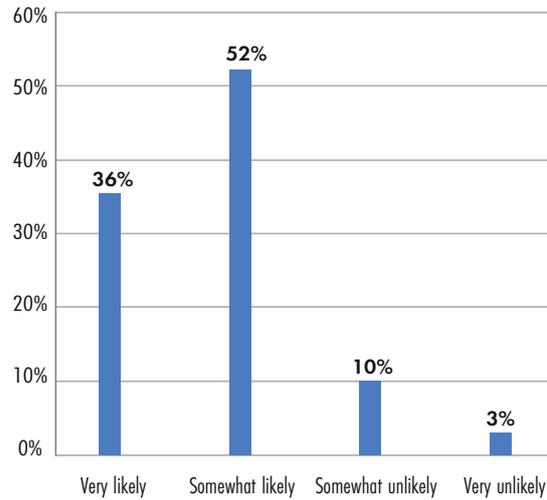
Recommend similar products

Product recommendations can be a useful way to offer inspiration to website visitors. 35% of Growth 2000 retailers offer product recommendations on their websites.

Recommendations are most likely to be offered by fashion retailers (44%), followed by brands (38%) and consumer electronics retailers (23%).

Figure 10. Product reviews make purchases more likely

The likelihood of making a purchase based on reviews on a retailer's product page, according to consumer research



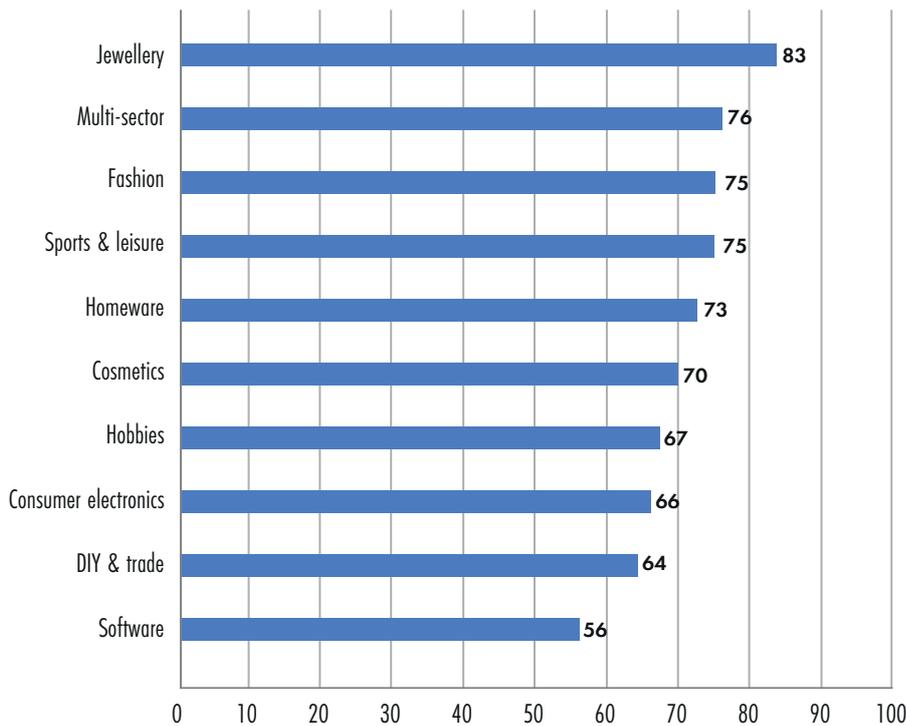
Based on 485 residents of the United States aged 18-64 who shop online, August 2022. Results are stratified by age and gender. Question: "How likely are you to purchase a product as a result of reading a good review in the following places: On the retailer's product page?"

Source: RetailX

© RetailX 2022

Figure 11. Jewellers' websites are easiest to navigate

Researchers assessed Growth 2000 websites for ease of finding specific products and information using search, menus, and filters, giving each company a score up to a theoretical maximum of 100



Source: RetailX

© RetailX 2022

LEADING RETAILERS: FIND
ACNE STUDIOS
AMARA
ASHLEY STEWART
BONANZA
THE BUCKLE
CHEAPER THAN DIRT
CHURCH'S
ETHAN ALLEN
MODA OPERANDI
NEW LOOK
OLIVER BONAS
LA PERLA
PGA TOUR SUPERSTORE
REJUVENATION
REPLACEMENTS
ROGUE
ROSS SIMONS
SCOTCH & SODA
SOFT SURROUNDINGS
SPRING
STELLA MCCARTNEY
THREADLESS
VICI
WINDSOR WOMEN'S CLOTHING
WINE.COM

CONNECTING THROUGH SOCIAL

Retailers that lead in the Social Dimension are more likely to use a variety of platforms to engage with shoppers

Social commerce has grown quickly in recent years and RetailX analysis investigates the extent to which retailers and brands are now likely to use social platforms in order to talk to shoppers in the US market.

The choice and use of those channels is highly strategic. By using channels ranging from Facebook to Instagram and Twitter, traders put themselves where existing and potential customers are likely to be. These places are also where conversations and engagement around the use of the type of products they make are likely to take place, so customers themselves can boost both brand and product awareness significantly. Traders may also use those social media channels to show individual products through a curated store front.

RetailX research in this Dimension looks at how brands and retailers use social media, as well as which channels traders in different retail categories choose to use.

That research is put against the context of RetailX Consumer Observatory research into how US shoppers want to buy. One key finding is that Facebook is the social media channel in which shoppers are most likely to click on a product ad – 45% of US respondents say they have done so. That's only slightly lower than the 47% who said they had clicked on a product ad in Google search results, and ahead of the 40% who had done so on YouTube. A third (33%) had clicked on an ad on Instagram, and 19% on Pinterest. The largest group of respondents (25%) said that seeing a product ad on a channel or service led to a buying decision a few times each year. Smaller groups said ads led to more frequent purchases – whether daily (13%), weekly (22%) or monthly (20%). 19% said this happened either once a year or less frequently.

RetailX Consumer Observatory research also found that half of the US online shoppers questioned say they are either very likely (16%) or somewhat likely (34%) to pay attention to what social media influencers say when they are deciding what to buy. Meanwhile, 30% say they look to social media ads,

and 25% to social media searches when searching for deals, rewards and discounts. That represents a significant level of interest in the market for finding products on social media.

HOW DO BRANDS AND RETAILERS USE SOCIAL MEDIA?

Most of the RetailX US Growth 2000 have a presence on social networks. They are more likely to be on Facebook (91%) or Instagram (84%) and least likely to be on Snapchat (1%).

75% are on Twitter, while 63% have a YouTube channel and just over half (53%) are on Pinterest.

Fashion is the largest single retail category in the US Growth 2000. That correlates with the RetailX Consumer Observatory finding that most US online shoppers buy fashion (54%) products over the internet. That's the highest level of interest in any category. Of the fashion retailers, brands and marketplaces listed in the Growth 2000, most (96%) have Facebook pages, while a slightly higher proportion have Instagram profiles (97%). 80% have Twitter accounts, while 62% have YouTube channels and 59% are on Pinterest.

In contrast, retailers and brands selling consumer electronics – the second-largest Growth 2000 category and which 38% of Consumer Observatory respondents go online to buy – are on Facebook (90%) to a similar extent to fashion. However, they are much more likely to be on YouTube (81%) than on Pinterest (21%). This seems to reflect the greater relevance of YouTube for 'how to' videos, but it could be that many are missing the opportunity to get on the radar of those planning projects on Pinterest.

Those selling sports and leisure clothing and equipment are much more likely to be on Facebook, Instagram (both 100%), Twitter (92%) and YouTube (91%)s but less likely to be on Pinterest (39%).

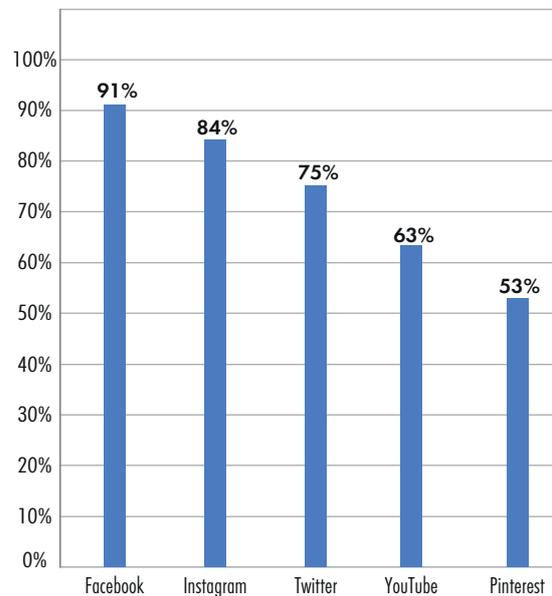
SOCIAL

Growth 2000 cosmetics retailers and brands have a high presence on Facebook (100%) and Instagram (100%), while most also have a high level of participation on YouTube (87%), Twitter (83%) and Pinterest (72%). There are fewer retailers selling garden wares in the Growth 2000 but those that are included tend to have a high level of participation – from Facebook, YouTube, Instagram and Twitter (all 100%) through to Pinterest (90%).

Booksellers, by contrast, are at the lower end for participation in social media. While 88% have a Facebook page, 65% are on Twitter and 59% on Instagram, less than half are on YouTube (47%) or Pinterest (35%). Perhaps this is because their products are less relevant to the platform, or because the platform is less relevant to their customers in the context of bookselling. Following a similar logic, only 7% of Growth 2000 brands and retailers selling software, and 14% of those selling musical instruments, are on Pinterest.

Figure 12. Facebook is retailers' most-used social network

The fraction of Growth 2000 retailers with a profile on a social media platform

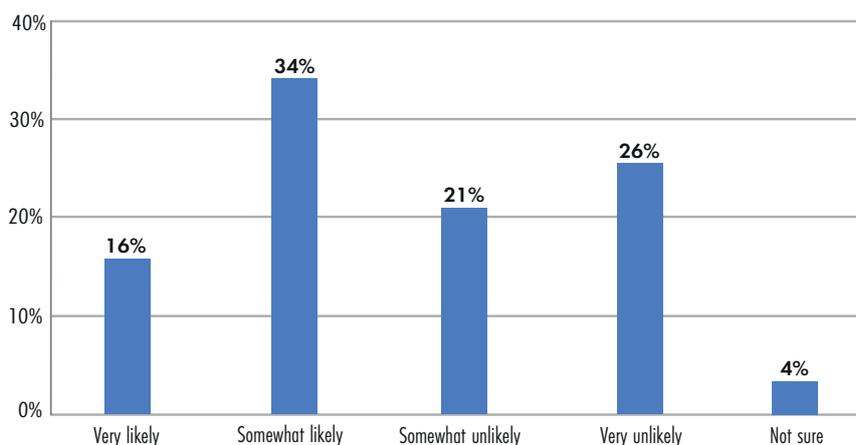


Source: RetailX

© RetailX 2022

Figure 13. Influencers sway a large portion of shoppers

The likelihood that social media influencers will influence a purchase decision according to consumers



Based on 485 residents of the United States aged 18-64 who shop online, August 2022. Results are stratified by age and gender. Question: "In your experience, how likely are content creators such as social media influencers to point you to buy products?"

Source: RetailX

© RetailX 2022

LEADING RETAILERS: SOCIAL

1800 PET MEDS
AKIRA
AMARA
CARPARTS.COM
CHRONO24
CONNS
DIGIKEY
DUSTY GROOVE
FROM YOU FLOWERS
GEMPORIA
IHERB
J.W. PEPPER & SON
JACK & JONES
JAMECO
LOVE BOOK ONLINE
LYST
MODESENS
ONE KINGS LANE
PARTS GEEK
ROGUE
SCHIIT
SHOPSTYLE
THREADLESS
THULE GROUP
UNIVERSAL CYCLES

FULFILLING PROMISES

Retailers that stand out in the Delivery Dimension stick to their promises

Delivery is the fourth Dimension of Growth 2000 research, since providing a fast and convenient delivery service is key to growing retail sales effectively. How quickly a product will arrive is also an important factor when shoppers make buying decisions. RetailX Consumer Observatory research in the US market suggests that delivery options are important for 50% for respondents. 78.6% say it's important or very important that online retailers provide next-day delivery, while 73.2% say the same for same-day delivery – and 60.5% for carbon-neutral home delivery. A collection option, meanwhile, is important or very important for 58%.

RetailX research found that while lower prices are the most important factor when shoppers decide to switch to a new product, better delivery options come in second place. That said, when shoppers were asked what type of discount they preferred when shopping, free or reduced shipping costs were most often named.

So how do US Growth 2000 retailers and brands measure up to those expectations? RetailX researchers considered the service that US Growth 2000 retailers offer to shoppers, analysing their performance through two key questions: what fulfilment promises do Growth 2000 retailers make? How well do Growth 2000 retailers keep shoppers informed?

WHAT FULFILMENT PROMISES DO GROWTH 2000 RETAILERS MAKE?

The speed and convenience of delivery promises are most easily measured through whether they offer faster services and collection, and their attitude to accepting returns of item bought online.

Next-day delivery

Next-day delivery is commonly offered – 47.5% of retailers have it as an option. It is available more often from retailers and brands selling cosmetics (58%) and jewellery (54%), while those selling sports and leisure clothing and equipment (44%), fashion (42%), consumer electronics (41%), homewares (33%) hobbies (26%) and multi-sector retailers (24%) all do so at a lower rate.

Same-day delivery

Same-day delivery is offered by a small minority of retailers and brands, with 2.7% of 1,533 assessed on the metric offering the service. Retailers selling homewares (8.3%), multi-sector (8.1%) and cosmetics retailers offer this at an above average rate. But retailers and brands selling jewellery and hobby supplies (both less than 1%), fashion (1.1%), consumer electronics (1.5%) and sports and leisure retailers (1.8%) all offer the service at a lower rate.

Collection

Only 198 (11%) of 1,820 retailers assessed on this metric offer click and collect services. Shoppers buying from that small group can expect to be able to pick up their orders in an average of 134 hours (five days and 14 hours), while the median time from order to collection is 120 hours (five days).

Returns

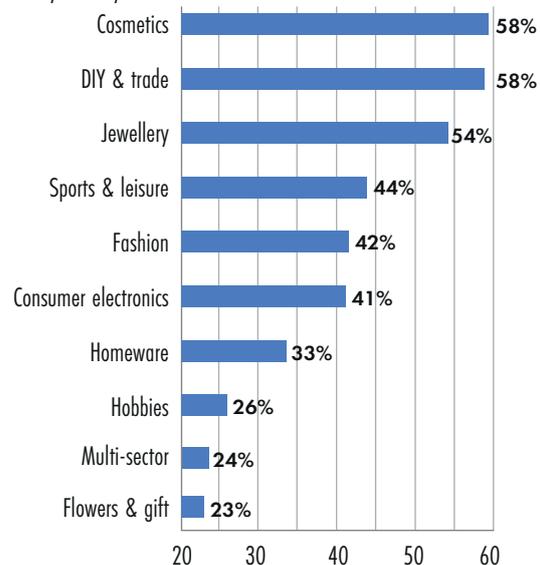
There's no legal requirement under federal for US retailers to enable shoppers to return an unwanted item for a refund, although there is a cooling off rule that gives shoppers three days to change their mind about a purchase worth \$25 or more. Retailers only have to accept returns if the goods are faulty or break the sales contract in another way, according to FindLaw.com^[1]. At state level, there is a variety of rules. In California, for example, retailers have to post their refund policy unless they offer a full cash refund, exchange or store credit within seven days of purchase. However, those that do not meet that requirement must accept full returns within 30 days of buying.

That said, RetailX research finds most Growth2000 retailers do offer returns of unwanted items bought online, perhaps because offering the option makes it more likely that shoppers will buy.

1,503, or 82%, of the 1,820 Growth 2000 retailers assessed on this metric enable customers to return an item they bought online for any reason within a given time frame. Buyers have an average of 45 days and a median of 30 days to make a return.

Figure 14. Cosmetics retailers offer the fastest delivery

The percentage of Growth 2000 companies in a sector to offer next-day delivery



Despite our assumptions, flowers and gifts retailers are least likely among the sectors shown to offer the service

Source: RetailX

© RetailX 2022

DELIVERY

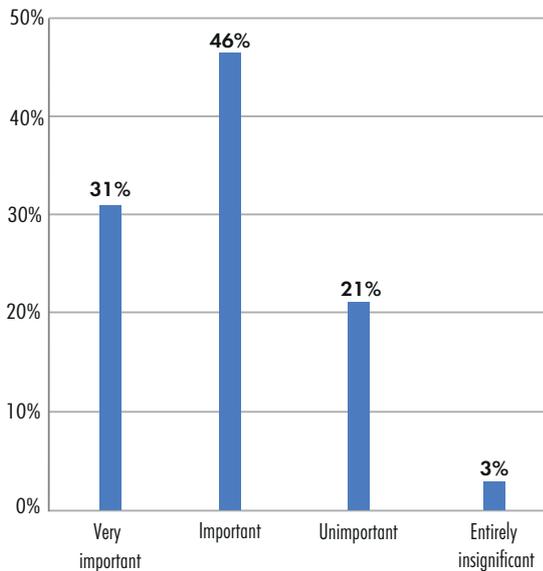
HOW WELL DO GROWTH 2000 RETAILERS KEEP SHOPPERS INFORMED?

Informing shoppers about their buying options – from whether items are in stock to how quickly they can be delivered – can both help to ensure that they continue their shopping journey on the website and that their expectations aren't disappointed at the checkout.

Showing fulfilment options on the landing page

68% of consumer electronics retailers take the approach of showing their fulfilment options on the landing page so that shoppers have an idea of how quickly they can expect to receive their goods before they get to the product page or checkout.

Figure 15. Next-day delivery is important to most shoppers



Based on 485 residents of the United States aged 18-64 who shop online, August 2022. Results are stratified by age and gender. Question: "How important to you is it that online retailers provide the following: next-day delivery?"

Source: RetailX

© RetailX 2022

Stock visibility

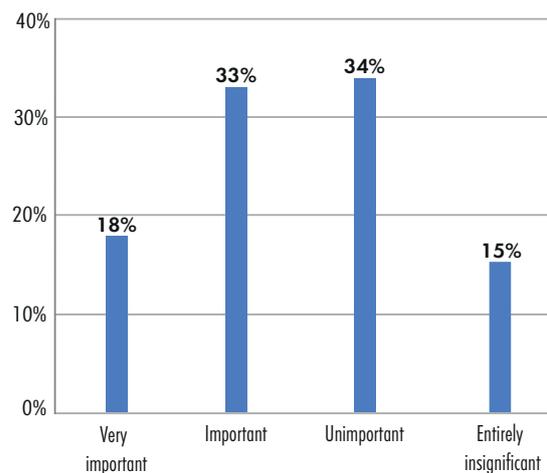
Showing whether an item is in stock can help shoppers to know whether it's worth proceeding to buy it, whether it's in stock online or instore. RetailX analysis suggests that multichannel consumer electronics retailers (42%) are most likely to show via their websites whether stock is available online, followed by brands (25%) and fashion retailers (18%).

Multichannel fashion retailers are most likely to show on their websites whether stock is available instore, with just under a third (31%) doing so. Almost a quarter of brands (23%) show instore stock, while less than 1% of consumer electronics websites do so.

[1] www.findlaw.com/consumer/consumer-transactions/customer-returns-and-refund-laws-by-state.html

LEADING RETAILERS: DELIVERY
AIRGUN DEPOT
BERGDORF GOODMAN
BOLT DEPOT
CITY
THE COMPANY STORE
DIPTYQUE PARIS
DOLLAR GENERAL
EL DORADO
ENVELOPES
FASHIONABLE CANES
FROM YOU FLOWERS
GARDER WHITE
GOLF GALAXY
GOPRO
LORO PIANA
MATTRESS FIRM
MISSION WINE & SPIRITS
MOOSEJAW
PATAGONIA
PERSONALIZATION MALL
RIO GRANDE
ROGUE
SALLY
SHOE CARNIVAL
VIVINO

Figure 16. Consumers' attitudes to carbon neutral delivery



Based on 485 residents of the United States aged 18-64 who shop online, August 2022. Results are stratified by age and gender. Question: "How important to you is it that online retailers provide the following: carbon-neutral home delivery (e.g. electric vans)?"

Source: RetailX

© RetailX 2022

COMPLETING THE PURCHASE

Retailers that stand out in the Checkout Dimension offer the customer choices around payment

The Checkout Dimension of the Growth 2000 looks at how retailers enable shoppers to move through the payment stage of their transaction. A fast checkout experience makes it more likely that purchases will be completed. However, requiring registration gives retailers more insights into and understanding of their customers.

RetailX researchers consider the checkout stage of a purchase by looking at the choices offered around payment, from whether registration is required to complete a purchase to the third-party payment methods that are available.

HOW MUCH CHOICE DO RETAILERS GIVE CUSTOMERS AT THE CHECKOUT?

A fast payment experience makes it more likely that shoppers will buy.

Registration at the checkout

Most Growth 2000 retailers require shoppers to register before they checkout. Doing so is most common among retailers selling electronics (94%) and sports and leisure (93%) products. Many retailers, however, opt to simplify registration by enabling shoppers to sign up using an existing third-party account, if they have one.

Facebook Checkout

14% of retailers use Facebook Checkout. The rate of use is higher among fashion retailers (19%) and brands (15%) yet lower among consumer electronics retailers (10%).

PayPal Checkout

35% use PayPal checkout. The rate of use is higher among retailers selling fashion (46%) and among brands (39%), but lower among those selling consumer electronics (20%).

Google Pay

Google Pay is used by 12% of retailers. Use is higher among fashion retailers (15%) and brands (13%) but lower among consumer electronics retailers (10%).

Amazon Pay

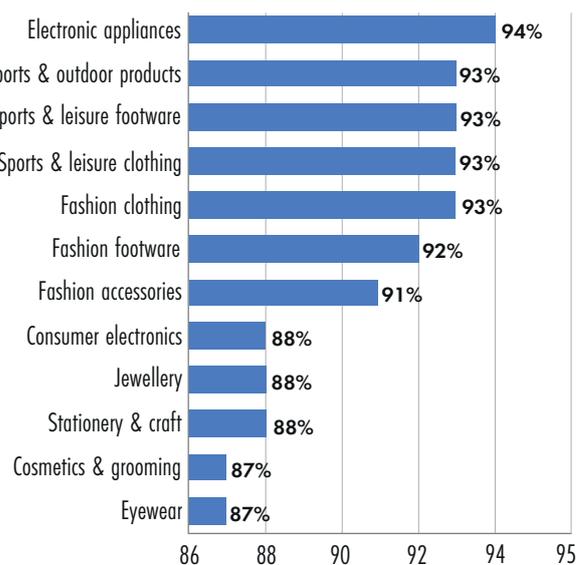
4% use Amazon Pay. The payment method is used at a higher rate among brands (5%) and at a similar rate among fashion retailers (4%). However, it is used by less than 1% of consumer electronics retailers.

Product ratings

By sharing product ratings, retailers enable customers to find out what others who have already bought an item thought of it. That can help to reassure shoppers who are deciding whether or not to buy. Growth 2000 research suggests that 35% of retailers and brands offer product ratings. Among US Growth 2000 retailers, ratings appear to be more often deployed by sports and leisure retailers (97%), marketplace hosts (96%), multi-sector stores (94%) and cosmetics retailers (93%) than by those selling fashion (78%) or consumer electronics (80%).

Figure 17. Customers must register

The percentage of Growth 2000 companies selling products in a category to require their customers to create an account before checking out



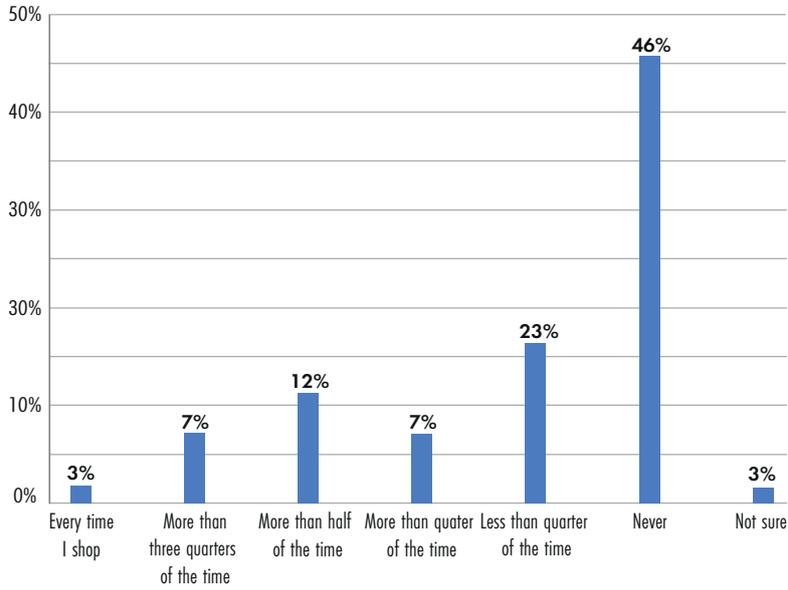
Source: RetailX

© RetailX 2022

CHECKOUT

Figure 18. How often customers use BNPL

Buy-now-pay-later service usage, as reported by customers



Based on 485 residents of the United States aged 18-64 who shop online, August 2022. Results are stratified by age and gender. Question: "How often do you use a buy-now-pay-later service?"

Source: RetailX

© RetailX 2022

LEADING RETAILERS: CHECKOUT

ADORE ME
BISSELL
BULLETPROOF
BURT'S BEES
CAMPING WORLD
DAVID'S TEA
ERICDRESS
GREEN BAY PACKERS
HOMEBASE
HONEST
HORSE.COM
JJ'S HOUSE
KITCHENAID
LANCOME
MUSIC STORE
NOVICA
PIPINGROCK
PLAYASIA
REVOLUTION BEAUTY
ROCKLER
STATE LINE TACK
VINEYARD VINES
WIGS BUY
WINDSOR WOMEN'S CLOTHING
ZAFUL

CHICO'S

chicos.com

LARGEST 100

Florida womenswear retailer Chico's was founded on the state's Sanibel Island in 1983, with a focus on original prints, colours and jewellery. Today, it and its sister brands, Soma and WHBM, sell through about 1,260 boutiques and outlets across the US. Chico's sells both to the US and internationally through a group multi-brand website, while off-price fashion is available through Chico's Off the Rack outlets website.

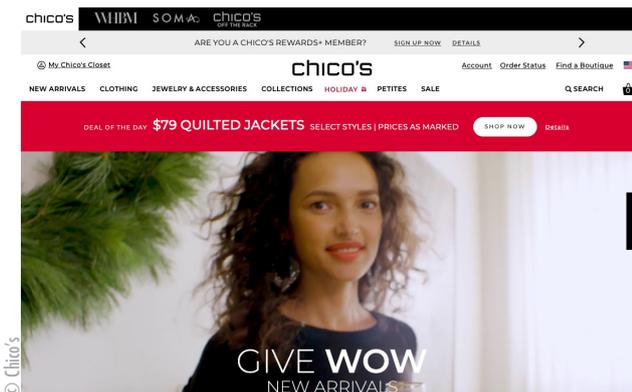
Chico's promises customers a personal stylist every time they buy instore, while style recommendations are also available online, on its mobile app, via live chat, text and email, or through a My Chico's Closet feature that suggests outfits items that go with previously bought Chico's clothing. The brand fosters loyalty through the Chico's Rewards Club, also available on its mobile app, a style blog and a book club.

Chico's engages with customers through channels including YouTube, Twitter, Pinterest and Facebook, where it has 1.2mn followers. Content featured includes style advice videos, images and deal alerts. It has 125k followers on Instagram, where it shares both its own and customers' images. Shoppers can sign up to its newsletter and use live chat from its home page.

The Chico's website is easy to navigate, with filters such as category, size and colour to narrow down the choice in primary categories including new arrivals, holidays, clothing and accessories. Products are illustrated with a choice of pictures, while shoppers can read reviews, find the right size through a fit finder, or share an item via Facebook, Twitter or Pinterest from the product page.

Chico's offers standard delivery of between four and ten business days to the US, with costs that vary by shipping address. Faster delivery options are also available – as quickly as same-day for orders placed by 2pm – as are instore or curbside pick-up.

At the checkout, customers can choose whether to register, checkout as a guest or through a third-party checkout, including PayPal, Amazon Pay, Apple Pay or Shoprunner, the latter with two-day delivery and free returns. ■



SWANSON VITAMINS

swansonvitamins.com

LARGEST 100

Wellness specialist Swanson Vitamins was founded in 1969 as Swanson Health Products, after founder Leland Swanson turned to vitamins to improve his arthritis. His subsequent exploration of natural health led to him starting the company, which is based in Fargo, North Dakota, where it also runs a shop. Now owned by private equity company Swander Pace Capital since the retirement of Swanson's son Lee in 2016, it sells online within the US and around the world.

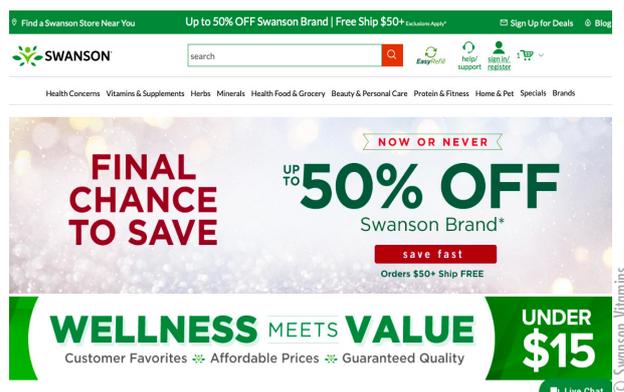
Shoppers can search the site by health concern – such as heart, bone health or stress – or by product type, narrowing down their search of a wide range through filters including brand, price and flavour.

Swanson engages with customers through four social media channels. They include Facebook – where it has its largest 278k following for a range of images, videos, recipes, deals and product information, as well as Instagram, Pinterest and Twitter. It shares Trustpilot product reviews throughout the website.

Shoppers can sign up for deals and news via email and texts, while the site has a blog and a live chat. An Android mobile app is available. Customers can save favourite items to a wishlist and when shoppers add an item to their shopping cart, the site recommends items 'you may also need'.

Swanson Vitamins charges \$5.99 for standard delivery, which takes up to seven days, although there is no delivery charge when shoppers spend \$50 or more. Delivery can also be upgraded to a range of faster delivery options, including the fastest – a next-day option. Customers can unlock free shipping on future orders of the same product when they spend \$35 or more. Unused products can be returned for free, although there is a 20% fee when goods worth more than \$500 are returned.

At the checkout, customers can opt to pay via third-party payment methods including Amazon Pay and PayPal or pay using credit cards. ■



SCENTSY

scentsy.com

LARGEST 100

Home fragrance direct selling brand Scentsy sells online through its website and a network of independent consultants. The brand, founded in 2004, is based in Meridian, Idaho and is owned by Heidi and Orville Thompson.

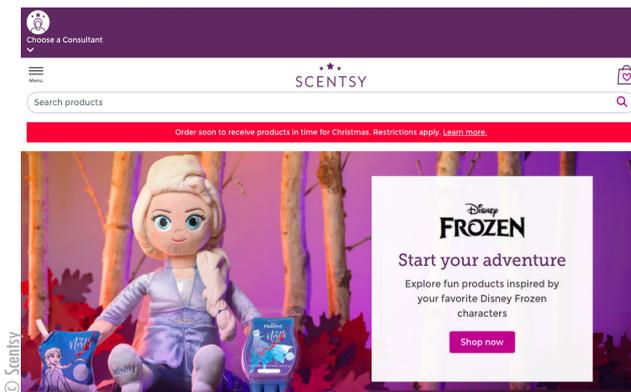
Shoppers visiting its website can find products through a straightforward approach to navigation. Main categories include warmers and wax, diffusers and oils, body and cleaning products, which are narrowed down through components to individual category and then product pages. There, products are illustrated through a choice of images, while their features are set out in clear descriptions of what products do and how they work, with further details on their use and care. From the product page, items can be shared through social media channels including Pinterest, Facebook and Twitter.

Scentsy has partnerships with a range of entertainment brands, from Disney to Harry Potter, and sells a range of products around these themes. At the checkout, shoppers can estimate delivery costs – which vary by destination – and use payment options including PayPal and Facebook Checkout as well as credit card options. They can also state whether an item is a gift and include a gift message while hiding prices. The company does not offer cash refunds on returns but products can be exchanged for another item within 30 days of delivery.

Scentsy offers subscription options including a monthly ‘Whiff box’ of samples and a monthly subscription box that enables shoppers to save 10% on a regular order.

The brand engages with shoppers through four social media channels, highlighted on its home page alongside a link to its blog. Its biggest following is on Facebook, where it has 1.7mn followers for content including product images, videos, competition and events. It also has Instagram, YouTube and Pinterest pages and features a gallery of social media images on its website.

Scentsy has mobile apps, although these are primarily aimed at Scentsy consultants running their own business rather than at the end customer. ■



CAMPING WORLD

campingworld.com

LARGEST 100

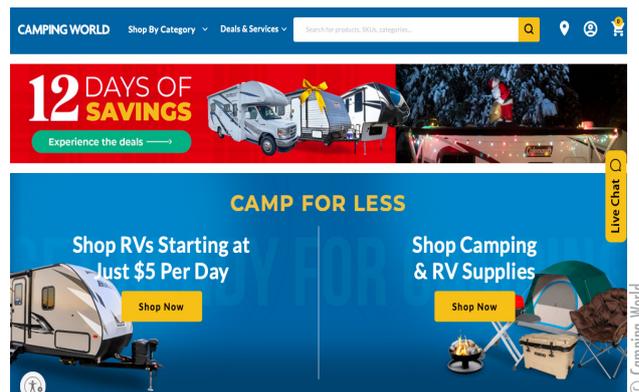
Camping, towing and RV retailer Camping World was founded in 1966 with a single shop in Bowling Green, Kentucky. It has served outdoor living enthusiasts across the US since then. In 2010, under the leadership of chief executive Marcus Lemonis, who remains at the helm today, it merged with Good Sam Enterprises – which offers a range of services to RV owners. Today, it sells products ranging from new and used RVs (recreational vehicles) to boating, watersports and fishing equipment from more than 185 super centres.

Visitors to its website can easily navigate the site through clear categories, narrowing down their search on the category page through filters including colour, brand, price range, ratings and special offers. They can see star ratings and the number of reviews a retailer has, as well as discounts that are shown through both the dollar amount of any discount and the percentage that this represents. From the product page, shoppers are offered a choice of images, the chance to add an item to its wishlist, and the choice of home delivery or collect from store. They can also see whether an item is in stock.

The retailer offers economy free shipping to US customers in 48 states when they spend more than \$99, or more than \$69 if they are members of the Good Sam product protection club. Unwanted purchases can be returned for a refund or exchange within 90 days of purchase. Internationally, the retailer also ships to Canada.

At the checkout, shoppers have the choice of registering to checkout, or checking out as a guest. Third-party payment method PayPal is also offered as an option.

Shoppers can sign up to a newsletter from the Camping World home page. The retailer engages with customers through its own blog, which offers products advice and touring guides, as well as four social media platforms – Facebook, Twitter, YouTube and Instagram. It has 73.8k subscribers on its YouTube channel, where it shares videos on subjects including the history of the RV. ■



BACKSTREETMERCH

backstreetmerch.com

LARGEST 100

BackstreetMerch specialises in selling official music merchandise to shoppers around the world. The UK-based retailer describes itself as “more of an artistic collective than a rigid workforce” whose members include musicians, DJs, music promoters, filmmakers and actors. It has been in business for 20 years and has sold online for the past eight, offering a range of products that covers “every major and some ludicrously obscure genres. From hardcore Norwegian death metal to US rap then twee Scottish indie.”

Bestselling names, however, include Bruce Springsteen, Foo Fighters, U2, Motorhead and Harry Styles, some sold via dedicated microsites.

Backstreet Merch says its business is about finding the products, however obscure, that its customers are searching for, and that ‘find-first’ approach is reflected in its website. Shoppers can opt to search for an artist from the home page, or to explore three main categories – bestsellers, most popular, or simply ‘browse products’, the latter via subcategories of apparel, music and accessories. When there are no results for a search on the artist’s name, the website offers alternative recommendations. Browsing visitors can narrow down their search through filters including artist, category, gender, price range and product type. If an item is not immediately available, the company also promises to track down items from the relevant supplier.

Backstreet Merch organises delivery via five zones – the US is zone 3 – and costs are calculated by weight. It says that 90% of the 10,000 orders it handles each month are delivered within 28 days. A cooling off period starts when the order is placed and extends up to seven days after the goods are received – returns can be made within that period.

At the checkout, shoppers can pay via credit card or via third-party payment methods including ShopPay, Apple Pay, PayPal and Google Pay. The website is designed to be mobile-first. ■



NEBRASKA FURNITURE MART

nfm.com

LARGEST 100

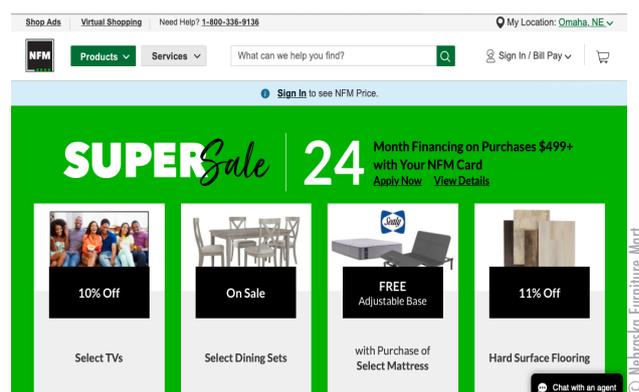
Nebraska Furniture Mart (NFM) was set up with the principles of selling cheap, telling the truth and offering both outstanding choice and service in order to improve its customers’ lifestyles.

The retailer was founded by Belarus immigrant Rose Blumkin in the basement of her husband’s shop in Omaha, Nebraska in 1937. Mrs Blumkin, who won investment from Berkshire-Hathaway, continued to work at NFM until 1997 – the year that she turned 103. Today, it is run by the fourth generation of her family, with Irv and Ron Blumkin chairman and vice-chairman respectively. Shoppers can choose to buy from one of its five stores, including a discount store in Omaha, or online for delivery within six states.

Visitors can navigate the website through three main categories – furniture, appliance, and electronics – that have discounts clearly flagged up throughout. They can then narrow down their search through a wide variety of filters that include price, colour, customer ratings, style and recline type, as well as whether a product can be viewed using augmented reality. On the product page, items are illustrated through a range of images, reviews and ratings and through where it is in-stock or on display. Questions can be asked, while previous answers are shown. The search can be further helped by advice from a concierge, available through a virtual or an instore appointment. Shoppers can also engage with the retailer via social media, with NFM’s Facebook, where it has its largest, 422.7k following for product suggestions, offers and events. Instagram, Pinterest, Twitter, YouTube and TikTok pages are all linked to from the home page.

A wide range of fulfilment options are available, including same-day, next-day and direct from the factory delivery, as well as drive-through collection. Standard delivery is in as little as two days, while it and collection are both free. Returns promises vary, ranging from 14 days for computers, tablets and cellphones to 30 days for furniture and 120 for mattresses.

At the checkout, shoppers can opt to register or checkout as a guest before paying by card or by a finance option such as monthly instalments. ■



RENT THE RUNWAY

renttherunway.com

LARGEST 100

Fashion subscription business Rent the Runway enables its customers to rent the latest styles instead of buying. The company was co-founded in 2009 by Jenn Hyman and Jenny Fleiss, then studying at Harvard Business School. It opened its first store in New York City in 2014 and in 2016, introduced membership schemes.

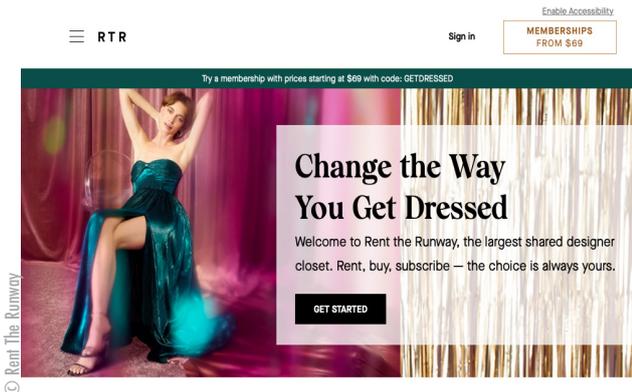
Users can sign up to one of a number of schemes, each offering a set number of items for rent for a monthly fee. Shipping is free and Rent the Runway says orders typically arrive in two days or less and include a pre-paid returns label.

Users find the right item by browsing by the type of event they are looking to rent for – from work to daytime, wedding or night out – before narrowing down their choice by size and availability. They can then use filters such as colour, level of formality, weather or length of type of sleeve to choose the right item for them. The product page offers a choice of images, star ratings and reviews, and has the functionality to add items to a wishlist to buy later. On the product page, shoppers can see information including stylist notes and a choice of images.

Rent the Runway engages with shoppers through four social media platforms, linking from the home page to Facebook – where it has 771.1k followers for videos, images and offers – Instagram, Pinterest and Twitter. An automated quiz offers shoppers more insights into what pieces might work for them, while machine learning, informed through member feedback, enables the business to understand what will fit. Users can opt for a back-up size for free. Machine learning also helps to inform future recommendations for each shopper. The site features videos and blogs with style and rental advice, while further advice is available through live chat or on social media.

An iPhone mobile app enables shoppers to amend their order, get instant shipping updates and get further information on offers, new arrivals or invitations.

While shoppers must register to checkout, they can also log in via Google or Facebook. ■



BROOKLINEN

brooklinen.com

LARGEST 100

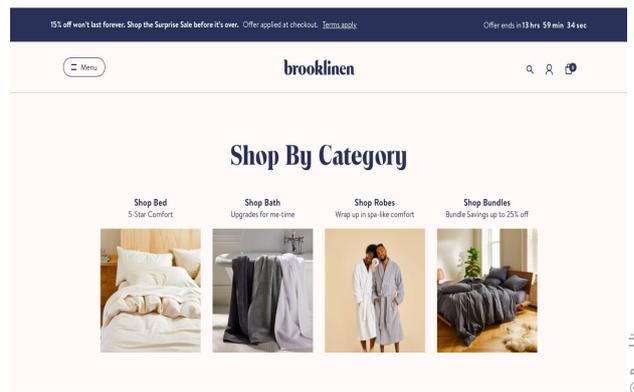
Brooklinen was founded by Vicki and Rich Fulop who wanted to find somewhere to buy quality sheets at a reasonable price after falling in love, during a 2012 trip to Las Vegas, with hotel sheets that proved unaffordable. Now a \$100mn Brooklyn-based brand, it sells online for delivery to the US and internationally, and through seven stores in locations including New York, San Francisco, Santa Monica and Philadelphia.

The Brooklinen website operates through a pared-back navigation where key categories include bed, bath, loungewear, decor and robes. Users can then choose between different styles of the product they are looking for, before the product category page is illustrated with key features, overall star rating and number of reviews, along with prices. On the product page, they can see a choice of images and, in some cases, product videos and images shared on Instagram, alongside product and care details, and the returns policy.

Items can be added to a wishlist. Shoppers can take the Brooklinen quiz and get product recommendations and can sign up for its newsletter from the home page. They can also click through to four social media channels – Facebook, Twitter, Pinterest and Instagram – where it has its largest, 318k, following for inspiring brand and customer images.

Shipping is calculated at the checkout, where shoppers can opt to send an item as a gift and leave a note. Returns can be made for up to 365 days, either instore or through the post. Return shipping within the US is paid by the retailer.

At the checkout, Brooklinen shoppers can have plenty of choices. They can checkout as a guest, with the option to sign up to Brooklinen’s email marketing list, or log in to an existing account. They can opt to pay all at once, use their existing credentials to sign in to alternative payment methods including Shopify’s Shop Pay, Amazon Pay, Apple Pay or PayPal, or spread their payment over four payments using afterpay. The checkout also features recommendations for other products, and any discounts are automatically applied. ■



SPOONFLOWER

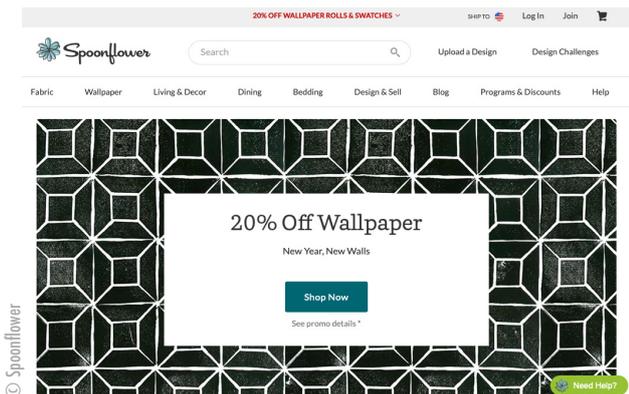
spoonflower.com

LARGEST 100

Spoonflower is a print-on-demand wallpaper and home decor business that uses designs by artists from around the world. It was founded in May 2008 by Stephen Fraser and Gart Davis, who previously worked on a print-on-demand book website and were inspired to shift medium when a family member wasn't able to find the fabric they wanted for curtains. Today the Durham, North Carolina business works with more than 3.3m artists, designers and other creatives around the world who contribute designs to the site and earn royalties when customers buy wallpaper, fabric and home decor featuring them. Customers from the US and a wide range of international markets can buy online from the business, choosing the language, currency and type of measurements they'd like to use.

Shoppers can search for the product they want or navigate through primary categories such as fabric, wallpaper, living and decor before moving through product types to see the designs that are available in a given category. Each is illustrated through a choice of images on the product page, where shoppers can also see product information, from dimension to material, and how soon a product will be made and shipped. Alternative recommendations are also featured at this stage, both showing how the design is used on other products, and other designs on the type of product.

The retailer engages with website users through a blog, content around products and how they are made and provides links on its home page to three social media platforms where it has a presence, Facebook, Twitter and LinkedIn. Its largest social following is of 334.7k followers on Facebook, where it has a range of inspirational design videos, images, special offers and more. At the checkout, shoppers can opt to pay by card, through PayPal or in instalments using afterpay. They can also opt to checkout as a guest or register. ■



COLUMBIA SPORTSWEAR

columbia.com

LARGEST 100

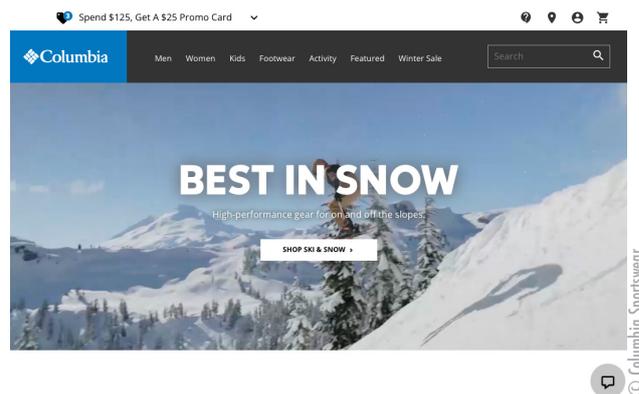
Columbia Sportswear is an outdoor clothing and sportswear brand, known in particular for skiwear and winter sports clothing worn by Winter Olympics teams including the US. Today it sells to customers around the world online and through stores.

The roots of the Portland, Oregon business go back to 1938 when it was founded as the Columbia Hat Company by Paul and Marie Lamfrom, refugees from Nazi Germany who soon started manufacturing their own products. It has remained a family business ever since, growing into an international sportswear brand under the leadership of their daughter Gertrude Boyle and her son Tim.

Visitors navigate the Columbia Sportswear website through clear primary categories organised by who the products are for – men, women, kids – and what activities they will be used for – from skiing to hiking to fishing. They can further narrow down the range through filters including size, colour, benefit – such as water resistance – activity and price. On the product page, shoppers can find out more through a choice of images, ratings, reviews and customer questions and answers, as well as information about shipping and returns. The product page features recommendations for items that 'you may also like'.

Members of its Greater Rewards loyalty scheme get free shipping on every purchase, while non-members get free shipping when they spend \$125 or more. Unwanted goods can be returned for up to 60 days.

Customers can get in touch with the brand by phone, through live chat on the website, and can also sign up for . From the home page, it links to six social media channels including Facebook, where it has 2.3m followers, for content that includes product information, inspiring images and videos as well as a store front, as well as Instagram, YouTube, Twitter, TikTok and LinkedIn. At the checkout, shoppers can choose between registering an account or checking out as a guest. They can pay through methods including PayPal, Apple Pay, and Klarna. ■



ROCKLER

rockler.com

LARGEST 100

Rockler sells woodworking, workshop and power tools and equipment and says its goal is the same as when it first opened – to be its customers’ go-to DIY resource.

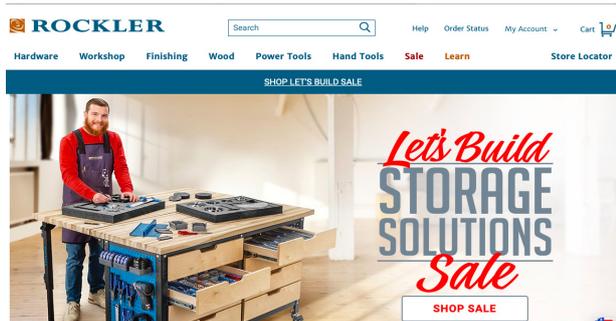
Rocker Woodworking and Hardware opened for business in 1954 when Norton Rockler started the Minnesota Woodworkers Supply Company in north Minneapolis and it is still based in Minnesota. Today it remains a family business, which provides support to its customers through some 40 stores and online through advice and an expert community. The retailer holds classes, demos and offers advice in-store, while online it offers articles and how-to videos, Q&As and a gallery of customer projects. Its Wood Talk podcast and Woodworkers Journal magazine are also available online.

Online visitors can navigate its website through main categories that include hardware, workshop finishing, wood, power and hand tools before narrowing down the options through filters including price, stock status, product ratings, brand and whether or not there is a discount coupon. Shoppers can read a detailed description of products, which include both its own brand and third-party brands, see their technical specifications, read view star ratings and read reviews and questions and answers.

They can also sign up to its newsletter from its home page, and click through to its social media presence on sites including Facebook, Twitter, Pinterest, YouTube and Instagram. On Pinterest, it has 261.9k followers for content including woodworking videos, plans, how to guides, and information on DIY woodworking projects.

They can get free standard shipping when they sign up to Rocker’s email list when they spend \$49 or more. Otherwise, shipping costs between \$7.99 and \$25.99, depending on the size of the order, and deliveries as fast as next-day are also available. Returns can be made within 90 days of purchase.

At the checkout, customers can choose to buy use their bank card to pay – while those who prefer not to pay online can call, fax or use mail order to pay. ■



© Rockler

ARBONNE

arbonne.com

LARGEST 100

Cosmetics, skincare and natural products company Arbonne sells its range online and through an international network of independent consultants. The brand was founded by Petter Mørck, who started developing botanically-based products in Switzerland in the 1970s before moving to the US to launch the company in 1980. The brand was named for a village in Switzerland but today its headquarters are in Irvine, California, and it has overseas offices in Toronto, London and Sydney. It has been a B-corp company since 2021 and its focus on sustainability includes running on 100% renewable electricity and putting both energy and water efficiency measures into place.

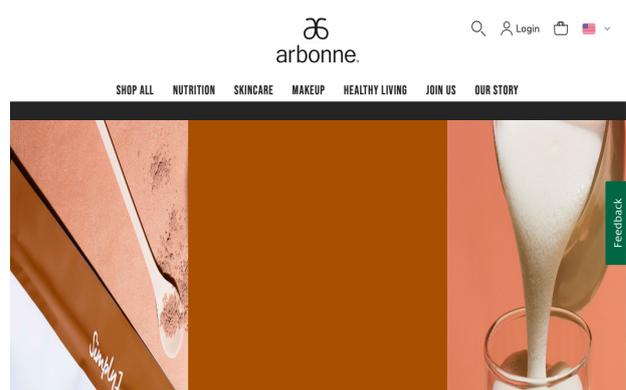
Visitors to its website can navigate its range through primary categories including nutrition, skincare, makeup and healthy living. They can then narrow down its range through filters including collection, type, or concern – from ‘multiple signs of ageing’ to acne and blemishes.

On the product page, goods are illustrated through a choice of images, with descriptions including ingredients and how to use a product. Other recommendations are also flagged up here.

From its home page, shoppers can click through to social media platforms including YouTube, Instagram, Facebook, Twitter and Pinterest. It has 480.4k followers on Facebook for content including product videos, images, offers - including free delivery – and a store front. On its website it engages with shoppers through information on healthy living, and on its 30 days to healthy living programme.

The cost of standard delivery to customers within the US varies by order value and ranges from \$9.95 to \$31.95. Faster delivery options include next-day air, starting at \$31.99. Shoppers can return an item for a refund within 90 days of purchase.

Shoppers must register to checkout, either signing up as a client, a preferred client at cost of \$29 for 20% savings, a personal shopper and free shipping, or as an independent consultant, for a \$49 registration fee that unlocks sales commission, product discounts and offers. Payments are by card. ■



© Arbonne

STUSSY

stussy.com

LARGEST 500

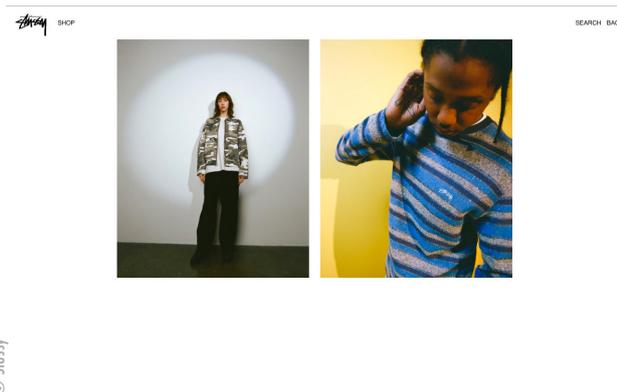
Californian streetwear brand Stüssy was founded in the 1980s by surfboard maker Shawn Stussy to offer a laidback approach to style and the brand continues to be based in the state to this day. Now owned by the family of Stussy’s business partner, Frank Sinatra Jr, Stüssy sells from its own website and trades from 25 flagship stores in cities as far apart as Los Angeles, Tokyo and London, as well as through third-party retailers.

Its design-led website is easy to find online. A search on the Stüssy brand name brings up shopping ads and images on its own website and on third-party websites, as well as its own direct-to-consumer website, its brand on third-party retail websites and its social media presence on Instagram.

Shoppers can start a live chat with Stüssy or sign up to its newsletter from the home page of its website, and can also click through to its presence on seven social media channels. These include Instagram – where it has 4.7mn followers for content such as inspirational product images and videos – as well as Twitter, Facebook, Vimeo, YouTube, WeChat and Weibo. The Stüssy website is image-led, with navigation via key categories from tees to outerwear and eyewear. It is also easy to search, with results presented by product type, category, or by page – from features to lookbooks and collections. A features section on the website highlights collaborations with a range of brands, from Dries Van Noten and Converse to Nike.

Products are illustrated through a choice of images and colour options. At the checkout, shoppers can opt to pay via ShopPay, PayPal or Google Pay express checkouts, and they can also choose whether to register for an account.

Shipping is free to the US when shoppers spend more than \$200. Orders can be returned for free within 14 days of receipt using a pre-paid label. ■



© Stussy

SUNSPEL

sunspel.com

LARGEST 500

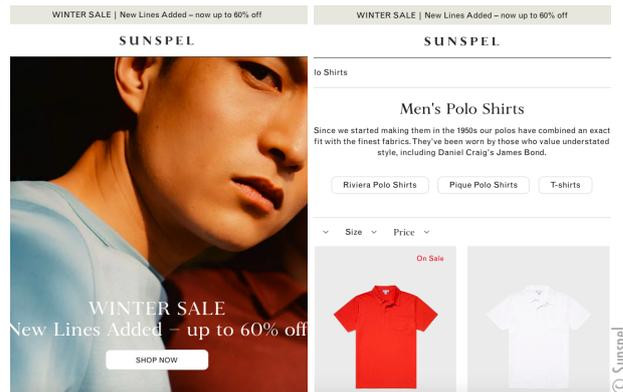
The roots of UK heritage clothing brand Sunspel go back to 1860, when Thomas Arthur Hill started to make mens’ luxury underwear. The brand went on to be an early pioneer of T-shirt making and today works with style icons including Paul Weller, David Shrigley and Edie Campbell to develop ranges of modern day luxury essential clothing. Sunspel lays claim to being the only British brand that makes T-shirts in its own factory in the UK – at Long Eaton, Derbyshire, where it has been based since 1937. The brand sells on its own website, through eight shops in London, one in New York and one in Tokyo and via third-party retailers.

Sunspel is easy to find online. It appears first in both paid and organic results on a search of its name, while results also include shopping ads, third-party websites selling its brand, and its Instagram page. Shoppers can click through to three social media pages from its home page as well as sign up for its newsletter. Its largest following is on Instagram, where it has 108k followers at the time of writing for content that includes insights and images from its design collaborations. It also has a presence on Facebook and Twitter.

The site is easily searchable, while a straightforward approach to navigation offers filters ranging from category and colour to materials, size and price.

On the product page, shoppers can see a choice of images, choose colours, find a size guide, product description, which includes suggestions of what items might go with the one the visitor is considering.

At the checkout, shoppers can pay via express checkouts including Apple Pay, PayPal and Google Pay. In the US, the retailer promises delivery within one to three days at a cost \$10 or free for orders over \$250. Taxes and customs are prepaid for items that ship from the UK. Returns can be made for up to 28 days after ordering, either through the postal service or through its New York shop. ■



© Sunspel

METHODOLOGY

OUR RESEARCH COVERED FIVE AREAS:

FOOTPRINT: calculated on retail turnover, the ecommerce subset of this turnover, web traffic and the number of stores.

FIND: the extent to which retailers demonstrate visibility, simplicity and expertise in search and navigation.

SOCIAL: retailers' presence on and interaction with customers via social media

DELIVERY: measuring speed and cost of delivery, the flexibility of fulfilment and returns and click and collect services.

CHECKOUT: the website features and third-party plug-ins retailers use to help shoppers make a final decision to purchase.

FOOTPRINT CLUSTERS

The Growth 2000 are shown in this report listed alphabetically within size ('Footprint') clusters. Footprint is our measure of retailers' significance to consumers comprised of online and offline revenues, web traffic and stores operated.

WHAT CONSTITUTES A RETAILER?

The Growth 2000 are the largest retailers according to their Footprint outside the US Top500. The modern multichannel landscape is more complex than merely 'having a website' or 'operating a store'. In choosing the RetailX Growth 2000 (G2K) we have considered companies' intent, capabilities and activities around the recruitment and monetisation of customers. The definition of a 'retailer' for inclusion in our research is:

DESTINATION: in the minds of customers, a destination is a shop, site, place, time or event that's a source of product, service or experience.

FASCIA-FOCUSED: individual trading names, rather than a parent company that may operate more than one brand. Since group structures are invisible to customers, they have no bearing on the position of brands owned by a group.

PURPOSE: the retailer has created goods and/or services for the specific purpose of selling to the purchasing consumer.

MERCHANDISING: the retailer actively sells and is not just a portal for taking customers' money.

ACQUISITION: the retailer actively markets, recruits and attracts customers with a promise or proposition to the destination.

SALE: the retailer takes the customer's money. The retailer owns the transaction as the merchant of record.

RECOURSE: the retailer is responsible for the service, fulfilment and customer satisfaction owing from the sale.

EXCEPTIONS: we may include a certain business due to its influence upon retailers and retailers' customers.

EXCEPTIONS

MARKETPLACES: only when a marketplace undertakes customer acquisition and manages both payment and recourse on purchases is the company eligible for inclusion.

PURE TRANSACTION/TARIFFS: we will not necessarily include businesses where ecommerce is not the main function. For example, online payment for gas or electricity.

B2B AND DIRECT-SELLING BRANDS: Due to the increasingly retail-like behaviour of B2B brands, we have included certain direct-selling brands and B2B businesses.

CONCLUSION

In this first US Growth 2000 report, we've contrasted findings about how US shoppers want to buy with insights into the ways that retailers and brands are selling to them. By doing so, we aim to offer businesses that are currently active in the US market, or considering expanding into it in the future, an understanding of how retailers do business there, as well as how that reality measures up to customer expectations.

The picture we gain as a result offers retailers initial insights that will develop in future years as retailers continue to progress their strategies and as we gain year-on-year insights into how that picture is changing. The US Growth 2000 is designed to enable retailers to benchmark themselves against their peers

and see how they measure up both against industry standards and against customer expectations. We trust it will prove a useful tool and look forward to updating our research next year.

In the meantime, we always want to hear from you, both with suggestions of new metrics that our research should now track and with the names of retailers that we have not tracked this year but should in the coming 12 months. Get in touch at research@retailx.net.

Chloe Rigby, editor

Thank you

Thanks to our Knowledge Partners for their contributions to our year-round research, and for helping us to bring our insights and findings to professionals working in ecommerce and multichannel retail.



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