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TOP 100

2018

Consumers weigh in on the top brands including brick-n-mortar, online and overall customer experience.



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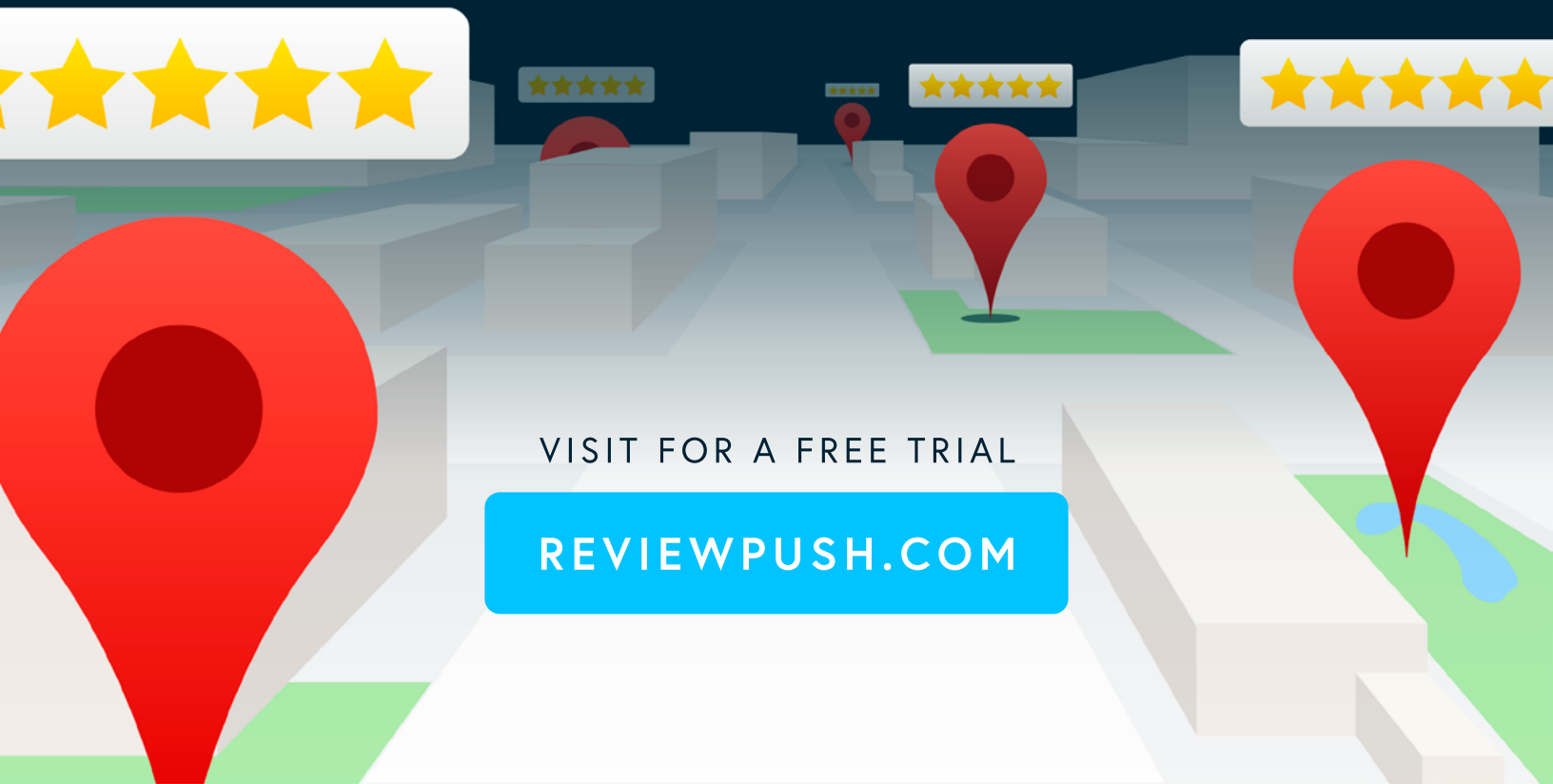
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EXECUTIVE SUMMARY

Welcome to Retail Customer Experience's 2018 Top 100 report, which provides a clear picture of how consumers view retailers when it comes to meeting their needs, wants and expectations.

The report provides invaluable insight on what retailers are doing (whether online only, brick-and-mortar or omnichannel) to enhance, boost, improve and advance the customer experience in light of increasing competition.

As with last year's report, we asked consumers to rank retailers in several different ways: which were best on handling complaint/issues, which boasted most ease in checkout, which are deploying the best experience online, which have the best experience in-store and deliver an easy, quick product return.

We also gathered consumer insight on what they want regarding delivery — which is a huge focal point with retailers today, as they are scrambling to offer same-day to two-day to even hourly delivery and taking unique strategy paths to provide such options.

The report also queried consumers on their mobile device use when it comes to shopping, comparing products and using the device in the retail environment. Consumers today love mobile, and they are increasingly relying on it in the retail realm.

But before we get into the stats on mobile and delivery, we need to start with this year's unsurprising results: Amazon remains tops, once again, and way ahead of its competitors; Walmart is steadfast and secure in second place once again.

Now the big surprise: Costco, a retailer that's been in the top five of every Top 100 report Retail Customer Experience has published, nudged Target out of its long-held third-place perch and down into fourth.

What? Yes, you read that right.

Wholesaler Costco — which has been extremely quiet regarding its CX strategy, in-store and online technology moves — is third on the list this year by a mere few percentages in several categories and with 26 votes more than the nearest competitor, in top retailer. Target, despite its many moves and CX efforts, finds itself falling back even further in the race to beat its two top retail competitors.

When consumers were asked if they had money to spend where would they go, their choices were Amazon, Walmart and Costco. Yet Target still beat Costco in a few categories, including best retail physical experience, so next year could see a flip back into Target landing in second place once again.



Judy Mottl
Editor
Retail Customer
Experience

Judy Mottl is an experienced editor, reporter and blogger who has worked for top media including AOL, InformationWeek and InternetNews. She's written everything from breaking news to in-depth trends.



EXECUTIVE SUMMARY

When it comes to delivery expectations, the big word is free. When asked, about 19 percent of consumers view delivery as a crucial aspect in the purchase decision and expect free same-day and two-day options. Nearly 70 percent want free shipping so much they are willing to wait a bit longer if needed.

On the mobile device front, industry reports in the past year that predict increased reliance and use in the retail interaction are clearly on target. Just about 48 percent of consumers are using their smartphones and mobile devices for product search needs, 37 percent are using them for price comparison, and just about 18 percent are using them for actual purchase.

Yet there's a long way to go before mobile devices become the primary retail consumer device, as 30 percent are not using mobile for any retail shopping or product search at all.

So, delve into the report and find out more about today's top 100 retailers and how consumers rank them when it comes to retail customer experience, and enjoy a commentary on the mobile device trend in play by Will Hernandez, editor of Mobile Payments Today.

Thank you for reading Retail Customer Experience and for downloading this special report sponsored by ReviewPush, whose support allows us to provide such great industry insight to readers at no charge.

Here's to another year of innovation and advancement in retail customer experience!

Judy Mottl
Editor, Retail Customer Experience



amazon



Amazon

Founded: July 1995

Headquarters: Seattle

Workforce: 541,900 (as of October 2017)

Quirky tidbit: Its workforce is larger than the population of 63 countries, including the Bahamas and Monaco.

In every year that Retail Customer Experience has produced its Top 100 report, Amazon has landed in first place without any real competition, and this year was no different. Amazon garnered 1,371 votes to claim top retailer, compared with Walmart's 286, Costco's 193 and Target's 167.

Along with no competition, the reasons for the retailer's continued leadership is simple. It's providing the fastest response to consumer complaints and the best overall shopping experience, according to our survey.

So, it's a safe bet Amazon is not going to be pushed off its leadership perch anytime soon — if at any point. As one industry pundit noted this year, Amazon is not as much a retailer as it is a technology innovator and an innovator that doesn't sit still, ever.

There could easily be a daily newsletter of announcements coming from Amazon, given all it's doing as an e-commerce leader and as a brick-and-mortar retailer. It's launching new brands and business initiatives — both big and small — way outside the lines of the retail world while still expanding on its retail core. All the advancements are a prime reason why Retail Customer Experience declared Amazon the [retail influencer](#) of 2017.

As anyone who follows Amazon knows, 2017 was a big year — one that likely will be mapped on the company timeline. The biggest news was Amazon's move to acquire Whole Foods Market in June for \$1.37 billion, an acquisition [blessed](#) by federal regulators by August.

Why grocery, as Amazon has already been running its own Pantry service online? One word: marketplace. The U.S. grocery retail market is the second biggest after China's. Costco, Target and Walmart are deeply entrenched in striving to beat out the traditional grocery players. The grocery market move is eerily similar to how Amazon initially started as an online bookseller. It eventually transformed the bookselling industry and put some big names out of business.

Folding Whole Foods into its arms not only gives Amazon tremendous leverage in product supply and pricing but also provides a new channel to drive its own products forward. The Echo voice-assistant device quickly became a prevalent brand in Whole Foods' 400-plus locations, and Amazon expanded its Echo line in 2017 as well.

Buying Whole Foods also fits nicely with the strategy for Amazon Go — the grocery store where shoppers don't need to bother with a cashier or checkout. Go debuted in late 2016 and was in play as a pilot store effort throughout 2017. The start of a new year brought news that Amazon will establish six Go stores in 2018.

Those are just a few of the big moves Amazon has made. In between, dozens of other actions have advanced Amazon's goal to provide product delivery and pickup wherever it can. It's even looking to become its own commercial delivery partner. In early February, [news](#) hit that it was prepping a service titled "Shipping with Amazon," which would put it in direct competition with UPS and FedEx.

At the same time, Amazon is viewed as a big friend for other retailers — 65 percent of retailers rely on Amazon and its seller market to boost revenue, according to the second quarterly [2017 E-commerce Performance Indicators and Confidence Report](#), from SLI Systems.

The report, however, notes that customer experience remains "king," for today's consumer and e-commerce retail success. But a rich, rewarding customer experience remains a bit of a weak spot for Amazon — at least according to some industry pundits. In fact, as Retail Customer Experience noted in a [feature](#) in late early 2018, Amazon is not bulletproof or immune to failure in the retail segment.

One industry expert noted that Amazon, and much of its strategies, depends big time on its Prime membership subscription — which is driving, and supporting, much of its e-commerce strategy and advancement. If that membership were to experience a big drop, it likely would greatly impact what Amazon does going forward.

While Retail Customer Experience [blogger](#) Chris Petersen, CEO of Integrated Marketing Solutions and a strategic consultant who specializes in retail, leadership, marketing and measurement, calls Prime the "most disruptive force of the Amazon ecosystem," the subscription program doesn't boast a strong customer experience, according to Christopher Hall, managing editor of the [Interactive Customer Experience Association](#) (ICXA). Simply, there is little fun factor in shopping on Amazon, Hall said, and that could prove to be a problem because consumers are wanting, expecting and demanding an engaging experience.

But, despite that weak spot, Amazon is in no danger of losing its retail leader title to any competitor anytime soon.



Walmart



Walmart

Founded: 1962

Headquarters: Bentonville, Arkansas

Workforce: 2.3 million associates worldwide

Retail locations: 5,358 units in U.S. (includes 597 Sam's Clubs)

Quirky tidbit: Founder Sam Walton is referred to as "Mr. Sam" by Walmart leadership.

In last year's Top 100, Walmart battled against Amazon, the eternal retail leader, and Target, which fell directly behind Walmart into spot No. 3.

This year, Walmart finds itself exactly where it was a year ago — a long way from displacing leader Amazon after landing at No. 2 but facing a new challenger, Costco, which is nipping at its heels after displacing Target for the third slot.

Yet, given that Walmart is the top U.S. brick-and-mortar enterprise, it likely doesn't have to sweat too hard to keep its perch, at least for a bit.

One reason is that it's been busy, busy, busy — 2017 wasn't quiet for Walmart by any means. Consider this: Walmart's e-commerce site, Walmart.com, now offers more than 60 million items compared with 20 million items in 2016. But not only is Walmart busy filling virtual shelves with new products, it's also actively advancing a slew of strategies.

The first few months of 2017 brought the Walmart Store No. 8 technology incubator initiative. Now just one year later, Walmart is busy pulling a virtual reality (VR) startup into its ranks to drive VR product development for stores and Walmart.com.

The lab, named in honor of the retailer's eighth store in Arkansas where founder Sam Walton piloted and tested strategies and innovation, also is focused on technology tied to personalized shopping and delivery advancements, including drones.

The lab's quest, according to Walmart leaders, is "disrupt ourselves before others disrupt us."

In May 2017, Walmart was reportedly investing using internet of things technology to develop a new way to track products in consumers' homes and help consumers when it comes to replenishing needed products. A CB Insights Cruncher [report](#) pointed to a patent filing regarding the technology effort.

By August, Walmart was teaming up with Google on a collaborative strategy to sell products via Google's online mall, Google Express, according to a New York Times report.

By the fall of 2017, Walmart announced it was teaming with Lord & Taylor to launch a flagship store on Walmart.com by spring 2018. It promises to deliver a "specialized online experience" and reflects Walmart's strategy to reach out to high-end, more luxury-focused consumers.

"We see customers on our site searching for higher-end items, and we are expanding our business online to focus on adding specialized and premium shopping experiences, starting with fashion," said Denise Incandela, head of fashion for Walmart U.S. e-commerce, in a news release.

In December, Walmart was testing a personal shopping experience for the wealthy busy mother. The service, according to a Recode [report](#), provides item recommendations and allows purchase via text. The report also noted Walmart is prepping a new in-store experience, called Project Kepler, which taps computer vision to provide a cashierless checkout.

Such a move is clearly a response to Amazon's Go cashierless store, which came out of beta in 2018 and will be expanded to six store locations.

And 2018 likely won't be any less busy, given the headlines so far. In January, Walmart announced an online grocery effort in Japan with Rakuten, Japan's biggest e-commerce retailer, and in March it launched a new brand in the mattress market.

As CEO Doug McMillon told a standing-room-only crowd at the NRF Retail's Big Show in January in New York City, retail is all about change and the goal for Walmart is to "help consumers save money, live better."

"We are a different kind of technology company, we have been one for a long time, but we're going to be a different kind [going forward]," he said.

In regard to Walmart's e-commerce strategy, shored up with the Jet.com acquisition, McMillon noted, "We are trying to grow. We have a lot of work to do to have the fundamentals, lots to catch up there."

Yet he clearly believes Walmart will succeed in its ultimate goal: a seamless experience whether in the store or online.

"That's where we think we can win," he said.



Costco

Headquarters: Issaquah, Washington

Workforce: 239,000 full- and part-time worldwide

Warehouse locations: 748 (As of February 2018)

Membership: 92.2 million cardholders (As of February 2018)

Quirky tidbit: It sells a \$6,000 doomsday meal kit.

If one had to point to the big “tell” of this year’s Top 100 survey, it must be that Costco — which landed fourth in last year’s survey — jumped into third place, knocking out Target.

Not too shabby. And it’s an accomplishment of big proportion given all the effort and money, Target is using to battle against Amazon, Walmart and Kohl’s. Target likely doesn’t even have wholesaler Costco on its “competitor” list, but it very likely should.

This year, Costco landed in third place with 193 votes for top retailer — 93 behind second-place finisher Walmart and just 26 votes ahead of Target, which is now in fourth place. In the Top 100 survey Retail Customer Experience asked consumers to list, if they had money to spend, the top three retailers they’d visit, and Costco landed in third, behind Amazon and Walmart and just ahead of Target.

The super wholesaler’s most recent financials clearly illustrate why it leapfrogged over Target in the Top 100. Sales in stores open at least a year increased 8.4 percent in the most recent quarter and its online sales leaped 28.5 percent. The third-biggest U.S. grocery player saw net income hit \$701 million — a healthy spike from a year ago when income was \$515 million.

One reason is that the retailer is doing everything it can to quickly get product to shoppers however it can — which is exactly what Walmart, Amazon, Target and grocers all are striving to do. It debuted two new delivery choices in late 2017, same-day and two-day via an internal program and partnership with Instacart. The two-day delivery service, called CostcoGrocery, is for nonperishable food and the Instacart service will deliver fresh and dry items.

Early this year, wholesale competitor Sam’s Club (aka Walmart) announced it was teaming up with Instacart for same-day delivery service in several market segments with expansion plans in 2018. Yet Walmart also announced about 650 layoffs at the wholesaler’s locations and had previously announced about 63 Sam’s Club store closures.

As the Top 100 survey results indicate, delivery is becoming a big focus for today’s consumers. Almost 70 percent want free shipping and are willing to wait a bit longer to avoid paying for fast free delivery. Nearly 20 percent, however, expect free same-day and two-day options and will go elsewhere if those options aren’t offered.

Like Amazon and its annual Prime membership, Costco also relies heavily on its membership base; according to Seeking Alpha, membership fees account for 75 percent of earnings. That doesn’t seem to be weakening, given last quarter’s renewal rate was 91 percent — a 1 percent increase over the previous three months, despite fee increases during the year.

In fact, Costco’s moves in 2017 led one industry analyst to call it “bulletproof” in the battle for retail dominance, stating specifically that Costco may be the only retailer Amazon can’t hurt because of its “sustainable” business model and laser focus on food and grocery sales. But, keep in mind that the Barclay’s declaration came just a month before Amazon’s move to acquire the Whole Foods Market grocery chain. Costco’s response to that, according to a Fortune report, will be a move to lower prices.

The wholesaler not only is focused on delivery and pricing, it’s also clearly boosting a service it offers that most of its competitors don’t: gas. In August 2017, a Market Force Information study, which polled 7,000 consumers, reported Costco landed at the top choice for gassing up at a wholesale club. Sam’s Club, the Walmart- owned competitor, came in third.

But Costco’s growth and increasing respect from consumers is likely because consumers typically can find whatever they need in bulk — whether it’s a crate of oranges, a mattress, tires, large cuts of meats not found at typical butcher shops, and the seasonal and unusual — such as its \$6,000 doomsday meal kits. The kit offers 36,000 servings of food, and the freeze-dried items can last 25 years on the shelf. Consumers would be hard pressed to find such an offering at their local grocery store.

4


TARGET®

Target

Founded: 1962

Headquarters: Minneapolis, Minnesota

Workforce: 323,000 team members worldwide

In the midst of a busy year, Target made two big announcements. In July 2017, the global retailer announced the development of 12+ new brands, all exclusive to Target. The announcement also included a sneak peek of four of the brands: A New Day, Goodfellow & Co., Joylab and Project 62.

“Our new brands are all about the changing face of our guests—what they need, what they’re looking for from Target,” said Mark Tritton, EVP and Chief Merchandising Officer, in a release. “When we took a close look at our existing assortment with this in mind, we saw a disconnect. We knew we’d need to refresh our offerings—and define new ones—so our guests continue to love what they’re discovering at Target.”

In addition to refreshing Target’s brand landscape, the retailer also kicked off plans in 2017 to reimagine more than 1,000 stores by 2020. The aggressive redesign began with the remodeling of 110 stores and the opening of 30 new small-format stores in 2017.

You might have noticed elements of the in-store reimagining in a Target near you. The remodeled stores include two entrances that each facilitate a distinct shopping experience: one that’s meant to inspire with displays of exclusive Target brands and seasonal moments; and a second that’s designed for convenience, complete with order pick-up, grab-and-go food and a wine and beer shop. Remodeled stores also include shops and displays designed to put apparel and other products front-and-center—similar to small, curated boutiques inside the larger Target store.

And as the omnichannel evolution continues to disrupt retail, Target remains committed to seamlessly blending technology with the in-store experience for better, faster service. Several innovative features launched throughout 2017, including:

- A 360-degree virtual reality living room experience (powered by CGI) on Target.com to help guests visualize an item’s size and scale before buying.
- An augmented reality tool, “See It In Your Space,” that lets guests virtually preview items in their own homes on Target.com’s mobile website.
- Target Restock, a next-day essentials delivery service that’s being tested in select cities.

Target also made faster shipping a focus in 2017, including expanded delivery capabilities and same-day delivery testing. Thanks to Target’s acquisition of Shipt, same-day delivery service is expected to expand to nearly half of Target stores by the first part of 2018.

5

Walgreens

Founded: 1995

Headquarters: San Jose, California

Workforce: 11,600 employees

Sometimes the best-laid plans can go awry, but that’s certainly not the case for Walgreens.

In January, the pharmaceutical company kicked off 2017 with an announced partnership with FedEx, which would add drop-off and pick-up services to Walgreens stores throughout the U.S.

Just 11 months later, Walgreens announced that FedEx drop-off and pick-up was available at 7,500+ Walgreens locations in all 50 states.

The last year also saw the forward movement of another business development: a merger with Prime Therapeutics to create a combined central specialty pharmacy and mail services company. The transaction closed in April 2017 and the company, Alliance Rx Walgreens Prime, is headquartered in Orlando.

Walgreens also turned its focus to its app, unveiling several enhancements buoyed by some compelling research. According to Walgreens’ data, more than 20 percent of its app users are 55 and older. Compare that to a 2017 survey by Forrester Research, which found that “just 9 percent of all smartphone owners who use shopping apps at least weekly are 55 and older,” according to a Walgreens press release.

To better serve that customer demographic, Walgreens unveiled several app enhancements, including:

- TouchID support and secure auto-login.
- Simplified menus.
- Pill reminder.
- Support for smartphones that offer font size options.
- Balance rewards, shopper loyalty points that accumulate as app users track walking, cycling, weight management, blood pressure and other health-related information.

You may have already seen the results of what proved to be one of Walgreens’ biggest announcements in 2017: the unveiling of new brand positioning in December, anchored by a new tag line, “Walgreens. Trusted since 1901.”

“The brand positioning is an effort to emphasize the aspects of Walgreens from the past 116 years that customers truly love,” according to a company press release. “Those attributes—care, trust and accessibility—are the focus of the new campaign, which includes new advertising and marketing, and a purpose to champion the health and well-being of every community in America.”

6

Best Buy

Founded: 1966

Headquarters: Richfield, Minnesota

Workforce: 125,000+ employees

Let's just put it this way: 2017 was a great year for Best Buy.

The company had battled lingering pessimism about its future, especially in light of Amazon's consistently meteoric growth.

Yet in August 2017, CNN Money shared good news: Best Buy shares were close to a record high.

"Since the company named Hubert Joly as its CEO five years ago, its stock has been an amazing performer, up about 240 percent," wrote NAME.

Best Buy's performance wasn't only noticed by CNN Money. The *New York Times* also [ran a story](#) on Best Buy in September 2017 featuring an interview with Joly in which he offered insight into the strategy behind Best Buy's turnaround. Credit goes to an increased focus on price (and price-matching) and customer service. Best Buy also made changes to their online ordering process so that orders could be shipped from stores, rather than warehouses, a small yet effective change that helped the company improve shipping times.

What many people may not realize about Best Buy is that while the company has aggressively focused on improving the customer experience (and revenue), they've also been committed to helping young people prepare for tech-reliant jobs with training and career readiness programs.

Best Buy ramped up that commitment with an October 2017 announcement in which the company pledged by 2020 to prepare one million youth each year for tech-focused jobs.

It's an ambitious but achievable goal. To accomplish it, Best Buy also announced a five-fold expansion of the Best Buy Teen Tech Center Network, with plans to grow from 11 to 60 centers across the U.S., Canada and Mexico over the next three years.

Additionally, Best Buy's New Career Pathways program gives 2,000 students per year the chance to receive post-high school career readiness assistance, including internships and career mentorship. According to Best Buy, all 60 of the aforementioned Teen Tech Centers will feature this program by 2020.

Lastly, as part of the announcement, Best Buy also committed to increasing foundation grants and programs. By 2020, the company will increase grants to reach 800,000 youth annually and will also expand outreach through the Geek Squad Academy to help teens learn about technology and prepare for success in an increasingly tech-focused workforce.

7

Aldi

Founded: 1946

Headquarters: Batavia, Illinois (U.S. headquarters)

Workforce: 25,000+ employees

Building on momentum throughout 2016 that included a variety of product-related updates and announcements, ALDI in early 2017 announced an aggressive \$1.6 billion investment in its stores. The plan includes the remodeling and expansion of more than 1,300 U.S. stores by 2020.

According to ALDI, the remodeled and expanded stores fulfill customer demand for a modern, convenient shopping experience. Remodeled stores will enable a larger focus on fresh items, including more robust produce, dairy and bakery sections.

Additionally, remodeled stores will also feature a modern design, open ceilings, natural lighting and environmentally friendly building materials like recycled materials, energy saving refrigeration and LED lighting.

At the same time that ALDI is focused on remodeling and expanding existing stores, the Germany-based company continues to pursue an accelerated growth plan that includes opening 650 stores across the U.S. By the end of this year, ALDI expects to operate nearly 2,000 U.S. stores.

Credit to ALDI — they're not only focused on the near-term future, but also what they want to see happen in the coming years. In a June announcement, ALDI refined its growth plan (backed by a \$3.4 billion capital investment) to expand to 2,500 stores nationwide by the end of 2022.

"With this growth, ALDI will be the third largest grocery store by count in the U.S. and serve 100 million customers per month," according to the company.

Not only will the growth plan add more stores and boost the number of ALDI customers — it will also add 25,000 new jobs in ALDI stores, warehouses and offices.

ALDI continued to make progress in expanding its technology enabled services throughout 2017. The company announced a partnership with Instacart in August 2017, featuring a pilot program that launched in Atlanta, Dallas and LA. Using the program, customers can order ALDI products that are delivered in as little as one hour.

And in September 2017, ALDI stores began accepting contactless payment, including Apple Pay and Android Pay. Not bad for a grocery chain that only began accepting credit cards at stores nationwide in early 2016!

8

KOHL'S

Kohl's

Founded: 1962

Headquarters: Menomonee Falls, Wisconsin

Workforce: 138,000 employees

Kohl's has long been a destination for popular brand collaborations like Vera Wang, Lauren Conrad and Jennifer Lopez. That focus on distinctive brand experiences continued throughout 2017, kicking off with the company's first-ever Motivation Market in January, featuring wellness ambassadors like celebrity trainer Bob Harper.

Just two months later, Kohl's launched its Under Armour collection, the largest brand launch in Kohl's history. And in the fall, Kohl's began rolling out the Amazon Smart Home experience to 10 stores in LA and Chicago.

The "first of its kind" experience enables customers to purchase Amazon devices, accessories, smart home devices and services directly from Amazon. Plus, the interactive in-store boutiques give customers the chance to explore signature Amazon devices like the Amazon Echo, Echo Dot and FireTV, among others.

Delivering an immersive, enjoyable omnichannel experience is a continual focus for Kohl's. In May, the company offered an update on the continued roll-out of small-format stores, 35,000-square-foot spaces that are designed to be flexible and efficient.

The small-format Kohl's stores require 60 percent less space and 25 percent less inventory compared to a standard Kohl's store. Plus, the small-format stores are equipped with kiosks so that customers can easily place online orders and buy online or pick up in store. The company added six smaller format stores in fall 2016, and planned to open four new small-format stores—as well as a fifth eCommerce fulfillment center—by the third quarter of 2017.

In addition to boosting its small-format stores portfolio, Kohl's also made an exciting announcement in September 2017: the opening of its 17th Wellness Center, "an exclusive health care facility for associates," according to the company. Each Kohl's Wellness Center offers health exams, screenings, primary care services, health consultations, immunizations and lab services, and use of the Wellness Center is available to associates on their first day of employment with Kohl's.

If you've shopped at Kohl's, you know how popular Kohl's Cash can be. During the 2017 holiday season, the company tapped the power of several social media channels, including Snapchat, to boost Kohl's Cash with social sharing integration, giving shoppers a chance to share their Kohl's Cash haul. For many brands and retailers, the way to a customer's heart is through a photo filter-enhanced selfie—for now, anyway!

9



Home Depot

Founded: 1978

Headquarters: Atlanta, Georgia

Workforce: 400,000+ associates

It's always wonderful to start a new year with big news—and that's exactly what Home Depot did in early 2017.

The company announced in February that Home Depot had been named one of the world's 50 Most Innovative Companies of 2017 by *Fast Company*, largely because of the company's "bold eCommerce strategy and efforts to integrate the digital and in-store shopping experience," according to [a Home Depot press release](#).

Here's more detail behind the recognition [from Fast Company](#): "In 2016, Home Depot delivered an estimated \$90 billion in annual revenue — and it did it without opening a new U.S. big-box store in the past three years."

That's a significant amount of momentum to leverage — and throughout 2017, Home Depot didn't miss a beat. The accolades continued with the June announcement of Home Depot as Internet Retailer's Omnichannel Retailer of the Year.

As further proof of Home Depot's commitment to innovation and sustainability, the month of August brought with it an exciting announcement: the creation of mini solar farms on 50 Home Depot store rooftops. Consider that the average Home Depot store is around 104,000 square feet. With 50 rooftops as solar farms, Home Depot said the project "will reduce electricity grid demand by an estimated 30-35 percent annually at each store — that's the equivalent of powering 2,300 average U.S. homes per year."

There's no doubt that Home Depot maintains a laser focus on enabling a seamless, enjoyable omnichannel experience. Yet that focus on continual improvement also extends to other types of brand interactions, including hiring.

Last March, Home Depot unveiled changes to its online job application, shortening the time it takes to fill out the application by up to 80 percent. The new application process can typically be completed in about 15 minutes on any device. And just in time, too—spring is Home Depot's busiest selling season, and in early 2017, Home Depot committed to hiring 80,000 new associates for the spring season.

Could 2017 get any better for Home Depot? Yep. In the company's year-end report, Home Depot celebrated fiscal 2017 as having "the highest sales and earnings in company history," according to the company, including a 21.5 percent increase in online sales compared to fiscal 2016.



ebay

Founded: 1995

Headquarters: San Jose, California

Workforce: 12,600 employees

If eBay's 2017 could be summed up in one word — err, acronym — it would be API (Application Programming Interface).

The company in June released updated sell and buy APIs, following a fall 2016 announcement of 10 new APIs that would be available in the coming months.

"As a team, we have an API-first mentality — we're taking a developer-centric model for delivering APIs," said Gail Frederick, senior director of eBay's Developer Ecosystem and Services, in a press release. "Working with third-party developers and launch partners to build and update APIs is important for eBay as we aspire to become the world's most powerful selling platform and a platform that developers love."

The updated APIs included new commerce APIs, which are useful for both buying and selling capabilities. For example, Taxonomy API gives sellers the category taxonomy for the eBay marketplace and suggested categories.

To better understand just how important APIs — and developers — are to eBay's success, consider the following stats. In the first quarter of 2017, external developers used public sell APIs to:

- Create more than 800 million new listings.
- Manage about 4 times that number of listings.
- Drive more than \$4.2 billion GMV globally.

And at the end of the quarter, the eBay Developer Program had 362,000 registered users across 190 markets.

Later in the year, APIs again returned to the forefront of eBay's focus. The company in August announced that it joined the Open API Initiative, which is "focused on creating, evolving and promoting a vendor-neutral description format," according to The Linux Foundation. "APIs form the connecting glue between modern applications. Nearly every application uses APIs to connect with corporate data sources, third-party data services or other applications. Creating an open description format for API services that is vendor-neutral, portable and open is critical to accelerating the vision of a truly connected world."

As part of the OpenAPI Initiative, eBay wanted to make it easier and faster for developers to integrate with eBay's RESTful public APIs.

"This opportunity leverages technology to make it easier for our developer ecosystem to create new eBay experiences," Frederick said in a release.



Bed Bath & Beyond

Founded: 1971

Headquarters: Union, New Jersey

Workforce: 65,000 employees

When you think of Bed Bath & Beyond, you likely think of its namesake stores—and those beloved 20 percent off coupons that seem to arrive in the mail at the perfect time!

Yet there are a number of brands under the Bed Bath & Beyond umbrella, including buybuy BABY, Cost Plus World Market and Face Values. And in 2017, the company further expanded its retail acquisition portfolio to include PersonalizationMall.com, a key way for Bed Bath & Beyond to tap into a lucrative market.

The personalization products market is estimated to be \$15 billion with a high-single-digit annualized growth rate, said Bed Bath & Beyond Chief Executive Steven Termars in a conference call.

Additional acquisitions included Decorist, which offers professional interior design services; and Chef Central, a specialty kitchen store geared toward both professional chefs and home cooks.

Of course, that certainly doesn't mean the company has lost sight of opportunities to further enhance Bed Bath & Beyond stores and the website. In January 2017, the company unveiled BEYOND at Liberty View, a new store concept in Brooklyn. The retail space unites four brands under one roof: Bed Bath & Beyond, buybuy BABY, Face Values and Cost Plus World Market, plus a full-service restaurant, The Bay Market Kitchen, and an event space, 71 at BEYOND.

To help fuel continued growth of Bed Bath & Beyond's digital channels, including its website and mobile app, the company introduced several enhancements throughout 2017, including improved search and navigation and a more seamless checkout experience. The addition of a coupon code in the online checkout gave the company's 20 percent off coupons omnichannel capabilities, while the app was optimized to upgrade the speed and overall experience.

Efficient use of store space is always top of mind, especially for large retailers like Bed Bath & Beyond. Just as many retailers are experimenting with more streamlined, cost-effective fulfillment, Bed Bath & Beyond piloted a program in 2017 to use select stores as fulfillment centers for online orders, especially as more customers opt for eCommerce.

12

Macy's

Founded: 1858

Headquarters: New York, New York

Workforce: Approximately 130,000 employees

There's no denying that the retail landscape continues to evolve rapidly, thanks largely to technology. And to stay ahead of the curve, global retailers like Macy's sometimes have to make tough decisions.

Macy's, Inc. kicked off 2017 with an aggressive plan to "streamline its store portfolio, intensify cost efficiency efforts and execute its real estate strategy," according to a press release.

Specifics of the plan included:

- The closure of 68 stores and a reorganization of the field structure to better support the remaining stores.
- The restructuring of Macy's, Inc. operations "to focus resources on strategic priorities, improve organizational agility and reduce expense," according to the company.
- The sale of properties in continuation of Macy's, Inc.'s previously announced real estate strategy.

But here's the good news. In that same announcement, Macy's, Inc. estimated an annual expense savings of approximately \$550 million, starting in 2017, as a direct result of the aforementioned actions. That savings gives Macy's, Inc. the ability to invest an additional \$250 million in growing its digital business, as well as supporting other growth-related initiatives.

"These savings, combined with savings from initiatives implemented in early 2016, exceed the \$500 million goal communicated in fall of 2015, one year earlier than expected," as stated in a release.

Meeting customers' omnichannel expectations continues to be of critical importance to retailers. In August, Macy's, Inc. announced the expansion of same-day delivery service to include 15 additional U.S. markets, including Austin, Cincinnati, Kansas City, Minneapolis, San Diego and Tampa. Same-day delivery service now covers 33 markets since its initial roll-out in 2014.

"We are dedicated to ensuring that whenever, wherever and however our customer chooses to shop, their experience is seamless and convenient," said Scott Prieto, executive vice president of Macy's Logistics and Operations, in a release. "We're excited that we can leverage the stores we have as fulfillment centers to power same-day delivery, closing the gap between customers and products for more of our shoppers just in time for the holidays."

The last year also saw the addition of several brands to the Macy's in-store portfolio, including Lucky Brand Home; YYIGAL, a limited-time collection by designer Yigal Azrouel; AVEC LES FILLES by Joyce Azria; CR by Cynthia Rowley; and KOBI, a collection with designer Kobi Halperin.

13**BARNES & NOBLE**

Barnes & Noble

Founded: 1886

Headquarters: New York, New York

Workforce: 26,000 employees

[VentureBeat called 2017](#) "The Year of the Podcast," citing a report by Edison Research and Triton Digital that found that 67 million Americans (24 percent of the population) listen to podcasts each month.

Call it smart thinking, then, on the part of Barnes & Noble when the company announced in August the launch of its new podcast, "The B&N Podcast."

The podcast's focus is in-depth conversations with today's most popular authors, including Paula Hawkins, John Grisham, Imbolo Mbue, Colson Whitehead and more.

And according to Barnes & Noble's Chief Digital Officer Fred Agir, the podcast is an ideal way to extend and enhance the in-store experience.

"Barnes & Noble is already a destination for customers to meet the authors they love and have conversations about their favorite books," Agir said in a release. "The B&N Podcast is a natural extension of those conversations, bringing the biggest names in literature directly to their audiences in a meaningful new way that only Barnes & Noble can deliver."

The 2017 holiday season ushered in the largest collection yet of Barnes & Noble's Black Friday Signed Editions program. Customers could choose from over a half-million autographed books signed by more than 150 acclaimed authors. Black Friday 2017 marked the fourth year of the program, which Barnes & Noble called "a combined effort between over 150 bestselling authors, our publishing partners and Barnes & Noble booksellers."

And in a compelling testament to the power of customer feedback, the company shared a heartwarming story in early December. A Daytona Beach Barnes & Noble store was scheduled to close because of an expiring lease. Third-grade students at Tomoka Elementary, distressed by the news, wrote a letter to Barnes & Noble CEO Demos Parneros. He was so moved by the letter that he personally intervened and helped the store and the landlord agree on a one-year lease extension, giving the company time to scout other possible locations in the area.

"My students were so upset when they heard their local Barnes & Noble might be closing," said Tomoka Elementary third-grade teacher Shaina Belsky [in a release](#). "I decided to make it a learning moment for them and challenged them to find solutions to problems, not just complain about them. With that in mind, we decided that we had best go right to the top!"

14

Kroger

Founded: 1883

Headquarters: Cincinnati, Ohio

Workforce: 443,000

“Kroger is a place where you can come for a job and stay for a career,” said Tim Massa, Kroger’s group vice president of human resources and labor relations, in a press release.

That declaration is much more than an aspiration. Instead, it’s Kroger’s reality, supported by an aggressive hiring plan with numbers that speak for themselves. In 2016, the company created more than 12,000 new jobs. They immediately followed that with a January 2017 announcement that Kroger would be hiring 10,000 employees.

“Over the last eight years, Kroger has created more than 86,000 permanent new jobs,” according to a press release. “These figures don’t include jobs created as a result of capital investment, such as temporary construction jobs, nor do they include increases due to the company’s mergers. Kroger and its subsidiaries today employ more than 443,000 associates.”

And as Massa said above, many Kroger employees stay with the company and develop challenging, fulfilling careers. One of the most impressive Kroger employee stories of 2017? The February retirement of the company’s longest-serving associate, Larry Arnold, who retired after 63 years with the company. Arnold worked as a dairy clerk at Kroger’s Pickerington Marketplace.

February also brought an exciting announcement: Kroger’s merger with the iconic New York-based cheese shop, Murray’s Cheese. Kroger began a relationship with Murray’s Cheese in 2008. By early 2017, more than 350 Kroger locations housed a Murray’s Cheese shop, which replicates the experience of the flagship Murray’s Cheese shop in Greenwich Village and includes an assortment of cheese, charcuterie and specialty food items. And in October, Kroger and Murray’s Cheese announced the opening of the 400th in-store Murray’s Cheese shop.

When you think of Kroger, you likely think groceries. Yet in this continually evolving and fast-paced retail market, it’s usually a good idea to diversify your brand when logical. And that’s exactly what Kroger did in September with the introduction of Kitchen 1883, a new restaurant concept. Located in Union, Kentucky, Kitchen 1883 offers “a fresh take on new American comfort food,” according to Kroger, and offers a made-from-scratch menu, handcrafted cocktails and a welcoming, community-centric atmosphere.

If it seems like technology was an afterthought to Kroger during 2017, that’s certainly not the case. In the midst of a busy year, the company launched home delivery with Instacart, formed a mobile payment partnership with Chase Pay and, in December, launched the 1,000th ClickList store, which gives customers a seamless, integrated digital shopping experience. Using ClickList, Kroger customers get quicker, easier access to products and recipes, digital coupons, weekly ads and shopping lists. Kroger opened its first ClickList store in 2014, and the company plans to continue expanding ClickList in 2018.

15

Ace Hardware

Founded: 1924

Headquarters: Oak Brook, Illinois

Workforce: Approximately 90,000 employees

Ace Hardware kicked off 2017 with exciting news: the company came in at #7 on Entrepreneur’s 38th annual Franchise 500 list. Ace Hardware, the largest retailer-owned hardware cooperative in the world, earned the top 10 recognition for “exceptional performance in areas including financial strength and stability, growth rate and brand power,” according to a press release.

And throughout the year, Ace Hardware kept that momentum going. February brought with it the announcement of expansion plans for the company’s Redistribution Center in Suffolk, Virginia. The expansion would add 138,000 square feet to the 336,000-square-foot facility and create more than 70 construction jobs. The expansion, completed in late 2017, was prompted by Ace Hardware’s year-over-year sales growth.

In March, Ace Hardware celebrated a milestone: the company’s 5,000th store. Owned by Tim and Kerri Jacobs, the store is located in Brownwood, Texas, and celebrated an August grand opening.

You may remember from last year’s Retail Top 100 that Ace Hardware began working with The Grommet, an eCommerce start-up that “markets and sells new and innovative products created by independent entrepreneurs, aka makers,” according to a release. More than 160 Ace Hardware stores displayed 20 featured products, rotated seasonally, from The Grommet.

The initiative proved so successful that Ace Hardware announced in October 2017 that it had acquired a majority stake in The Grommet. Given Ace Hardware’s focus on empowering entrepreneurs with the opportunity to own an Ace Hardware franchise, it’s no wonder they’re committed to a platform like The Grommet, which helped launch recognizable brands like FitBit, OtterBox and SodaStream.

Yet in the same announcement, Ace Hardware made it clear that they have no plans to change the trajectory of The Grommet.

The company “intends to provide considerable autonomy to The Grommet and has no plans to change the company’s strategic direction,” according to a release.

It’s a sort of an “if it ain’t broke, don’t fix it” approach. Last but not least? Ace Hardware closed 2017 with more big news. The company announced 2017 full-year revenues of \$5.4 billion, a 5.1 percent increase from 2016. Onward into 2018.

16**LOWE'S****Lowe's****Founded:** 1946**Headquarters:** Mooresville, North Carolina**Workforce:** 290,000+ employees

Many stores put out calls for hiring seasonal employees, and Lowe's is no exception. Lowe's announced plans in February 2017 to hire more than 45,000 seasonal employees to help with increased spring sales. In that announcement, Lowe's noted a growing need for a particular role: loaders to help customers who buy online and pick-up in store, a buyer preference that now accounts for approximately 60 percent of Lowe's online orders. The company also committed to hiring 1,700 full-time employees by October 2017 to fill new customer support and central production office positions.

Technology continues to be top-of-mind for retailers, and if the last year is any indication, Lowe's deserves a spot among the most technologically innovative brands.

"Holooroom How To," which debuted in March 2017, is an on-demand virtual reality skills clinic and the latest iteration of Lowe's Innovation Labs' Holooroom experience. "Holooroom How To" debuted at select stores in Boston and Canada, giving customers a chance to be immersed in a DIY project like tiling a shower with the help of a VR headset and handheld controllers. The controllers are even equipped for haptic feedback, so customers can feel sensations like the vibration of a drill.

Lowe's leveraged the power of augmented reality to launch Lowe's Vision, an in-store navigation app that the company said is "the first retail application of indoor mapping using augmented reality." During a pilot program in California and Washington, customers can use smartphones enabled with Google's AR technology, Tango, to navigate a Lowe's store.

And if you happened to be at the Lowe's in Christiansburg, Virginia, in late spring 2017, you might have noticed a truly remarkable sight. Lowe's partnered with Virginia Tech University to develop an exosuit: a wearable robotic suit that includes lift-assist technology. The exosuits are designed to "support employees by helping them lift and move product through the store more efficiently," according to Lowe's. Who needs robots when you could have robot-like powers?!

One of the benefits of increasingly powerful technology is that, if used correctly, it can help gather and analyze valuable data, including customer feedback and pain points. The trick is to put that data to work to produce a better outcome not just for the brand, but also the customer. And in July, that's what Lowe's did with the launch of The Upskill Project.

With The Upskill Project, participants can work directly with Lowe's associates and specialized experts that guide each participant through a particular home improvement project.

17**NORDSTROM****Nordstrom****Founded:** 1901**Headquarters:** Seattle, Washington**Workforce:** 72,500 employees

There's no doubt "innovation" is one of the buzzwords du jour, but it takes insight, expertise and strategy to leverage innovation in a meaningful, results-driven way. Nordstrom started 2017 with a plan to do just that: the creation of a new executive team role, Chief Innovation Officer, filled by long-time company leader Geevy Thomas, who immediately had his work cut out for him.

"Our new CIO and his team will lead the most forward-looking customer-centric effort that Nordstrom has taken on to date," said Erik Nordstrom, co-president of Nordstrom, in a release. "The Nordstrom Innovation Team will be tasked with helping the company ideate how its full-line stores of the future will better serve customers through further integration of digital and mobile."

Later in 2017, Nordstrom continued putting innovation in action with the launch of Nordstrom Local. The small-format stores (3,000 square feet, compared to the average 140,000-square-foot store) offer a service-focused concept. Nordstrom Local stores don't carry dedicated inventory. Instead, shoppers can select from a variety of services, including working with personal stylists; buy online with in-store pick-up; alterations and tailoring; Trunk Club services; manicures; and more.

Even as Nordstrom maintains a laser focus on creating an innovative, seamless omnichannel experience, they're also committed to continually expanding their brands with products that captivate and delight customers. Take, for example, Pop-In@Nordstrom, themed shopping concepts that transition every four to six weeks. Highlights of the company's 2017 Pop-In@Nordstrom experiences included KPOP-In@Nordstrom, featuring more than 500 favorite Korean beauty products; goop-IN@Nordstrom, a showcase of Gwyneth Paltrow's wildly popular lifestyle brand; and, during the holidays, a gift-centric shop in collaboration with The Museum of Modern Art's MoMA Design Store.

Of course, when it comes to retail, the real proof of strategic initiatives is in the sales. And for Nordstrom, fiscal 2017 merited celebration when the company announced record sales of \$15.1 billion.

18 FINISH LINE

Finish Line

Founded: 1976

Headquarters: Indianapolis, Indiana

Workforce: 10,000+ employees

Customer loyalty programs are a big business. [A 2017 study by Accenture](#) found that a whopping 77 percent of consumers participate in a retail loyalty program. It's no wonder, then, that The Finish Line, Inc., made some big changes to their loyalty app, the Winner's Circle, which they unveiled in April 2017.

The next-generation app update featured a "sharp focus on personalization and commerce," according to the company. Highlights of the updated Winner's Circle included a curated inspiration feed, tailored product recommendations, access to upcoming product releases and in-app shopping/checkout.

The app also helps Finish Line deepen its omnichannel experience. Using in-store beacons and geo-fencing technology, the Winner's Circle app offers users tailored in-store offers and other location-specific information.

Technology also took center stage later in the year when Finish Line unveiled its updated store design at the company's flagship Los Angeles store. At the time, it was the third store to receive the updated look, which features a technology-centric store experience to facilitate "unique, immersive customer interactions," according to the company.

The early November grand opening gave Finish Line a prime opportunity to demonstrate the improved capabilities of the Winner's Circle app. Members could livestream the grand opening throughout the day, and also see exclusive product drops throughout the day. Additionally, select Winner's Circle members were given an opportunity to get an exclusive first look of the store during a Friday evening preview, complete with swag bags.

The focus for many retailers continues to be omnichannel and effectively integrated digital technology into the consumer experience, but a growing number of retailers are also focused on tapping into the power of influencers to reach new audiences and build brand recognition. Finish Line also announced a creative partnership with certified platinum hip-hop group Migos, giving the artists the opportunity to act as creative directors for Finish Line. The company is showcasing the partnership on YouTube, the Finish Line blog, Twitter and the Finish Line website.

19 Apple iTunes

Apple/iTunes

Founded: 1977

Headquarters: Cupertino, California

Workforce: 110,000 full-time employees

Apple ended 2017 on the brink of an incredible milestone: 499 Apple stores throughout the world, with multiple openings planned for 2018.

But let's back up a bit. It's usually Apple's devices (and the app store, of course) that get much of the attention. Yet, Apple continues to pursue an aggressive retail strategy that includes opening new stores, revamping existing stores and introducing cutting-edge in-store programming.

The last year brought with it a number of new Apple store openings, most notably the company's first Apple store in Southeast Asia, Apple Orchard Road. If you find yourself in Singapore, the store's architecture alone is worth a visit (and a few dozen photos). Twin curved Castagna staircases arc gracefully throughout the interior, while a soaring 25-foot canopy protects the store from tropical sunlight and provides shelter from the rain. An incredible 120-foot glass facade minimizes the barrier from inside to outside, while 16 interior trees extend the lush greenery found outside the store.

Additional store openings included Cologne, Miami, United Arab Emirates, Brooklyn, China and Apple Michigan Avenue in Chicago, which the company calls its "newest and most ambitious store."

Today's retail landscape demands an unwavering focus on the experience and giving customers more than a place to simply browse and buy products. Apple Michigan Avenue is the result of this sort of focus and was carefully designed and built to act "as a gathering place for the local community," according to a press release.

Apple Michigan Avenue also gave the company a chance to collaborate with the City of Chicago and assist with one of the city's goals: enliven the Riverwalk along the Chicago River.

"Apple worked closely with the City of Chicago and referenced historical records to develop a store design specifically for the site on which it sits," according to the company.

The opening of Apple Michigan Avenue also gave the company an opportunity to highlight a new 2017 initiative: "Today at Apple," educational sessions on topics ranging from music and coding to art and design. Angela Ahrendts, senior vice president of retail, described "Today at Apple" as "a modern-day town square."

All signs point to 2018 being just as busy. Stay tuned!

20

7 Eleven

Founded: 1927

Headquarters: Irving, Texas

Workforce: 45,000 employees

Is there anything better than being ranked No. 1? 7-Eleven started 2017 in the coveted top spot of Entrepreneur's 38th annual Franchise 500, and in a press release, 7-Eleven President and CEO Joe DePinto called the recognition, "A tremendous honor. In turn, we recognize that our franchise owners are the key to this iconic brand's success and share this award with them."

The year that followed included a number of new product announcements and brand collaborations as 7-Eleven stays focused on giving customers an exciting assortment of old favorites and new discoveries.

In May, 7-Eleven embraced the fidget spinner frenzy and announced that the products would be available nationwide. Other product highlights included certified eclipse sunglasses for the total solar eclipse in August and, in November, the launch of Simply Me Beauty, an affordable line of makeup that 7-Eleven said was "created to appeal to millennial women."

7-Eleven also introduced some delicious new flavors, including the company's first candy bar-topped doughnut (spoiler alert: it's Twix). In the fall, 7-Eleven teamed with Pillsbury to serve the company's first hot stuffed waffle, a maple-flavored waffle stuffed with eggs, pork sausage and cheddar cheese. Around the same time, 7-Eleven expanded its prepared food program by adding 15 locally made heat and eat meals, the perfect blend of flavor and convenience.

If you've ever wanted a Slurpee right now, well, 7-Eleven listened. In December, the company began testing on-demand ordering for delivery and in-store pick-up at select Dallas stores. The service is available through the new 7-Eleven NOW smartphone app and is expected to roll out to other U.S. locations in 2018. The new service and accompanying app is part of what 7-Eleven called "a significant digital transformation."

First round of Slurpees on us?

21

Dollar Tree

Founded: 1986

Headquarters: Chesapeake, Virginia

Workforce: 176,800 employees

Buoyed by the general resiliency of the retail market's discount segment, Dollar Tree pursued an aggressive growth strategy throughout 2017 that included opening more than 1,000 new stores.

In addition to bringing new stores to market, Dollar Tree also remodeled more than 700 stores throughout 2017 to further enhance the customer experience.

"Renovated stores include better product adjacencies, an expanded assortment of refrigerated and frozen foods, expanded adult beverage sections where permitted, a new 'power alley' to promote \$1 items and redesigned checkouts to serve shoppers faster," said Dollar Tree CEO Bob Sasser in a Supermarket News story.

New store growth is expected to be a continual focus for Dollar Tree (especially in rural areas), with a goal to operate 26,000 stores in the U.S. and Canada. At the end of 2017, Dollar Tree's store count hit 14,744.

In the digital age, information can spread unimaginably fast, whether it's accurate or not. Dollar Tree found themselves the subject of an online hoax, created by a prank generator, that claimed all stores would soon close. Despite the inauspicious nature of the source, the story quickly spread before the correct information was shared by a variety of media outlets. The false claim was also debunked by famed Internet hoax breakers, Snopes.com.

The end of the year brought with it some tragic news for the Dollar Tree family. Macon Brock, Jr., co-founder of Dollar Tree, [passed away at 75](#).

22**DOLLAR GENERAL****Dollar General****Founded:** 1939**Headquarters:** Goodlettsville, Tennessee**Workforce:** 127,000+ employees

A number of big-box retailers continue to test smaller format stores, and in early 2017, Dollar General unveiled its own small-format concept: DGX, the first of which opened in Nashville.

DGX stores aren't only efficient; they're also designed to help Dollar General reach a new customer base that values both convenience and affordability.

"We're excited about our new smaller store concept and the opportunity to serve busy city dwellers with everyday low prices on the essentials they need in a convenient, easy-to-shop format," said Todd Vasos, Dollar General CEO, in a press release.

The 3,400-square-foot DGX store carries items geared toward instant consumption, as well as limited groceries, pet supplies, paper products and cleaning supplies, among other products.

Dollar General celebrated additional new stores and job creation announcements throughout 2017, beginning with a February plan to create 10,000 new jobs in 2017 through both new store and distribution center openings.

Also that month, Dollar General expanded to North Dakota, increasing the company's retail presence to 44 states. Dollar General also opened its 16th distribution center, located in Amsterdam, N.Y.

Late summer brought with it a milestone: the grand opening of Dollar General's 14,000th store, held in Dauphin, Pennsylvania. And at the end of 2017, Dollar General announced plans to build a new distribution center in Longview, Texas, that's expected to create approximately 400 new jobs.

23**L.L.Bean®****L.L. Bean****Founded:** 1912**Headquarters:** Freeport, Maine**Workforce:** 5,000 employees

Chances are good that you or someone you know owns a pair of L.L.Bean's iconic Bean Boots. The classic (and weatherproof) duck boots continue to be wildly popular, yet that ever-increasing demand has brought with it some challenges.

In 2016, for example, L.L. Bean made 3,000 pairs of boots each day and sold more than 600,000 pairs. Because each pair of boots is hand-sewn in Maine, they take time to make--and as the orders stack up, they create a sizable backlog that can result in a months-long delay.

Yet, L.L. Bean has no plans to slow their Bean Boots sales output. In fact, they set a goal of 750,000 pairs sold in 2017 and hope to hit one million pairs sold in 2018. So, in August 2017, the company opened its third manufacturing facility, located in Lewiston, Maine.

The highlight of the facility is a new \$1 million injection molding machine, which, according to the company, increases L.L. Bean's capacity to make Bean Boots by one-third.

It's an exciting development for the company that has seen its share of struggles. The last year marked two years of flat sales for L.L. Bean, yet the company continued to open six new stores throughout the year, including the first L.L. Bean store in Utah and its 35th store outside of its home state of Maine. Plans for 2018 include more new store openings.

Additionally, the company is in the process of expanding marketing in Japan and Europe. And in an effort to attract a wider array of customers to the Bean Boots, the company introduced new colors, lining and styles, giving customers an appealing variety of customization options so they can put their own spin on the classic footwear.

24**meijer****Meijer****Founded:** 1934**Headquarters:** Grand Rapids, Michigan**Workforce:** 77,000 employees

Judging by Meijer's 2017 highlights, one thing is clear: this company knows how to multitask!

The company committed in March to an investment of more than \$375 million in new and remodeled stores across its six-state area, including the construction of seven new Meijer supercenters and 22 remodel projects. The new store openings included an exciting announcement of a first-time Meijer store location.

"We're excited that at long last we'll cross the bridge and open our first stores in Michigan's Upper Peninsula," said Rick Keyes, Meijer president and CEO, in a release.

Once the 2017 remodels are complete, Meijer will have remodeled and upgraded nearly 90 stores since 2010. Although specifics of each remodel project vary store to store, updates usually include improved layouts; expanded grocery and health and beauty sections; and lighting, heating, refrigeration and parking lot improvements.

Continually improving the customer experience is as important to Meijer as its stores. And in March, the company's omnichannel strategy got a big boost. Meijer expanded its relationship with Shipt to bring home delivery to its six-state area in a gradual roll-out that began in Grand Rapids, Fort Wayne and Indianapolis. Customers can shop online or with an app, and orders are delivered in as little as an hour.

As the year progressed, Meijer's home delivery continued to be a big hit. Meijer strategically expanded its home delivery inventory to coincide with popular shopping times, including back to school and the holiday season. And by the end of 2017, Meijer was on pace to hit 1 million home deliveries.

An ongoing focus on sustainability has brought a number of environmental issues to center stage for retailers. And for grocers like Meijer, food waste continues to be a challenge. To help support the company's sustainability goals (which also support the USDA's goal of reducing food waste by 50 percent by 2030), Meijer began carrying Misfits produce in September. The "tasty but cosmetically challenged" fruits and vegetables are sold at a reduced price, giving customers a chance to buy food that would otherwise be discarded simply because it's not as aesthetically appealing as other produce.

See what we mean? Multitasking at its finest!

25**CVS/caremark™****Publix****Founded:** 1963**Headquarters:** Woonsocket, Rhode Island**Workforce:** 246,000+ employees

Delivering a better customer experience has long been a focus of CVS Health. And throughout 2017, the company showed their commitment to this goal by demonstrating a willingness to embrace innovation opportunities throughout the customer journey.

April brought with it a reimagined CVS store design with a greater emphasis on health, beauty and streamlined in-store navigation. The updated layout included a new assortment of healthier food and health-focused products, as well as expanded beauty selections.

To help guide the customer through their individual store visit, the new CVS stores also feature "discovery zones" marked by informational signage that "takes a holistic approach to care and product selections," according to a news release.

As many as 70 new and existing CVS stores were updated with the new layout throughout 2017, and the company plans to continue expanding the roll-out to several hundred more stores this year.

While CVS maintains a commitment to increasing the number of updated stores, they're also focused on opening new retail locations. The company celebrated its first retail location in Colorado in May 2017, the first of three locations to open throughout the greater Denver area in 2017.

Yet the key to truly leveraging the power of innovation is the ability to spot what might be an unconventional opportunity. In September, CVS turned its focus outside the traditional retail space and unveiled new automated retail vending machines.

Each vending machine is stocked with over-the-counter health products, healthy snacks and popular personal care products. The first 25 vending machines were unveiled throughout New England and New York in locations that included airports, public transit stations, office parks and college campuses.

The company's biggest news came at the end of 2017 when CVS Health announced a merger with Aetna, one of the nation's leading diversified health care benefits companies. Both CVS Health and Aetna strive to put the consumer at the center of health care delivery, and together, they plan to "create a health care platform built around individuals," said Larry J. Merlo, CVS health president and CEO, in a release.

INDUSTRY INSIGHT

Convenience will be at the center of how retailers answer Amazon Go

Amazon Go once again captured headlines earlier this year on a rumor that the e-commerce king is preparing to build more Go stores in Seattle and one in Los Angeles.

While the company refuted a public report about the rumor, the idea that Amazon might expand Go outside its home base shouldn't surprise anyone considering the buzz the concept has generated in the past year.

Amazon already has a framework for how it opens physical stores. It opened its first physical bookstore in Seattle almost three years ago. The chain has spread to 13 locations and counting, with two locations each in the Boston area and New York City.

Amazon has been down this road before. But Go is a different animal.

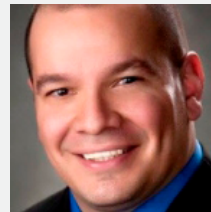
Go isn't necessarily a new concept, but Amazon's take on cashierless shopping brings with it questions about the future of retail and changes the way we as consumers buy goods.

In turn, traditional retailers are thinking about how to combat one of Amazon Go's most attractive features: convenience.

The answer to that likely doesn't lie in Amazon Go clones, but the ability for retailers to fight convenience with convenience — with the smartphone at the center of it all.

Convenience is something consumers crave in their shopping experiences. And in consumers' minds, Amazon is doing the best job.

Retail Customer Experience surveyed consumers for this report and found that Amazon, by a wide margin, provided the best online shopping experience; some 62 percent of respondents chose the online retailer.



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Will Hernandez has 16 years of experience ranging from newspapers to wire services and trade publications. Before becoming Editor of Mobile Payments Today, he spent two years as the content manager for PaymentsJournal.com, a leading payments industry news aggregator and information hub published by Mercator Advisory Group.

INDUSTRY INSIGHT

Perhaps even more important to these consumers is the effort Amazon puts into responding to their inquiries. Amazon again led the pack in this category, as 29 percent of consumers believed the online retailer provided them with the fastest response to a complaint or question.

How these areas play out for Amazon in Go stores will go a long way toward how other retailers respond to consumers' shopping expectations.

"The cumulative experience has been that Amazon Go is evidence that Amazon is going to try and break into the physical world with customer convenience as their competitive edge," Will Hogben, CEO of mobile software provider FutureProof Retail, told Mobile Payments Today in a recent interview.

But that doesn't mean Amazon Go clones will start popping up at Home Depot or Target.

"I think the cautionary tale here is that [Amazon Go] doesn't make sense for every type of retailer," Michelle Evans, the global head of digital consumer research at Euromonitor International, told Mobile Payments Today in an interview. "It works for certain types of outlets where you're selling certain types of products and services. I think a convenience store is most likely your best fit."

That is why it makes little sense for Amazon to shoehorn Go into something like Whole Foods Market, which Amazon purchased last year to much fanfare. Some retail industry analysts speculated that Amazon could deploy the Go concept at Whole Foods, but such an undertaking could be costly.

Amazon Go in Seattle uses hundreds of small cameras throughout an 1,800-square-foot space. While Amazon hasn't said much about how the camera technology works, it told the New York Times "it involves sophisticated computer vision and machine learning software."

A typical Whole Foods location has some 39,000 in gross square footage, according to an analysis from Statista.

Amazon took months to perfect Go in a much smaller space. Even when the Seattle location officially opened, Amazon admitted only a select number of shoppers at once into the store because that was all the camera technology could handle at the time.

As Evans mentioned earlier, convenience stores likely provide the best setting for an Amazon Go-type concept. However, Amazon will not be the only company to corner that market.

Bank of America Merchant Services and Philadelphia-based Stuzo showcased at Money20/20 a future convenience-store concept with no checkout lanes, physical point-of-sale devices or cashiers. It is a different interpretation of what Amazon has tested with Amazon Go and what Walmart rolled out last year with Scan & Go.

Stuzo has tested the concept in two pilots. But here's the catch: Consumers won't start to see these connected storefronts until the year 2025.

INDUSTRY INSIGHT

The issue at hand isn't necessarily the technology, but retailers building these types of stores from scratch rather than retrofitting them into existing locations.

China, not surprisingly, has already given us an idea of what that could look like in the U.S.

Euromonitor's Evans pointed to a company called BingoBox.

The startup's concept involved an unmanned, cashless convenience store where shoppers use an app to scan and purchase products. Users need to scan a QR code to even get inside the store, and they check out via WeChat.

For now, BingoBox uses radio frequency identification (RFID) tags on its goods but plans to move to the technology found in Amazon stores.

"I think it's funny that Amazon gets all the headlines on these things, whereas it (unmanned self-service shopping) certainly seems it's gotten more traction in China than here," Evans said.

She also pointed to what Alibaba has accomplished in the country.

Alibaba last year opened the self-service Tao Café, a 200-square-meter store offering beverages, fast food and snacks. The café uses a similar system to Amazon Go.

Alibaba has cashierless shopping throughout a chain of supermarkets called Hema. Consumers use a Hema app that acts much in the same way as Walmart's Scan & Go. They then visit a self-checkout kiosk to bag their groceries and pay via Alipay.

It's difficult to ascertain how retailers might respond to Amazon Go because, well, they're not talking about it publicly.

Mobile Payments Today, a Retail Customer Experience sister publication, reached out to six different retailers to comment for this commentary. All declined. At least two of the retailers cited competitive reasons for not wanting to speak on the record about Amazon Go.

But make no mistake, retailers are monitoring Amazon's plans with Go.

"I've talked to tech vendors, and they said after Amazon Go made headlines they got bombarded [with requests from retailers] wanting to know how they could move to an unmanned setting," Evans said.

FutureProof's Hogben has been as overwhelmed, and not only supermarkets have been reaching out to him about his company's concept.

"From a retailer's perspective, it's great to offer the customer that cashierless experience," he said. "I think they all know that they will have to, because ultimately the thing that is hurting retail right now is convenience of online.

"Convenience is the battleground that they have to fight on to keep their [in-store] traffic."

Academy Sports + Outdoors**Date founded:** 1938**Headquarters:** Katy, Texas**Workforce:** 23,000**Number of retail locations:** 240+ (company website)

Summary: Academy Sports + Outdoors is a privately held retail chain specializing in outdoor sporting goods and equipment. It has over 240 stores in 16 states throughout the South, South-east and Midwest. In addition to selling hunting, fishing and camping equipment, Academy Sports + Outdoor sells firearms, grills, bicycles, patio furniture, footwear, apparel and games. In 2017, Academy Sports + Outdoor became the title corporate sponsor of the Texas Bowl.

Advance Auto Parts**Date founded:** 1932**Headquarters:** Roanoke, Virginia**Workforce:** 74,000**Number of retail locations:** 5200

Summary: Advance Auto Parts is the largest automotive aftermarket parts provider in North America, serving both the professional installer and do-it-yourself customer. It operates nearly 5,200 stores under the Advance Auto Parts, Autopart International (AI), Carquest, and Worldpac banners in the US and Canada. Its stores carry brand-name replacement parts, batteries, maintenance items, and automotive chemicals for individual car and truck owners. AAP's Carquest, AI, and Worldpac stores cater to commercial customers, including garages, service stations and auto dealers.

Ahold USA/Royal Ahold**Date founded:** 1887**Headquarters:** Carlisle, Pennsylvania**Workforce:** 204,000**Number of retail locations:** 2100

Summary: Ahold USA is a subsidiary of Ahold Delhaize, a Dutch-based international retailing group that operates some of the best-known hypermarkets, supermarkets and convenience stores in the United States. Ahold USA's brands include Food Lion, Stop and Shop, Hannaford, Giant Martins, Giant Landover and Peapod. Last year was a year of dedicated digital growth for the company's brands via more responsive websites and an increase in social media followers, citing record-setting customer engagement, activity and savings through its digital coupons and loyalty program. Ahold USA also launched its Fresh Stories You Tube video campaign created to provide meaningful information to consumers regarding their fresh produce suppliers.

Albertsons**Date founded:** 1939**Headquarters:** Boise, Idaho**Workforce:** 273,000**Number of retail locations:** 2,239

Summary: As of June 17, 2017, Albertson's operated 2,329 stores across 35 states and the District of Columbia under 20 banners: Albertsons, Safeway, Vons, Jewel-Osco, Shaw's, Acme, Tom Thumb, Randalls, United Supermarkets, Pavilions, Star Market, Carrs and Haggen. Albertson's continually provides its customers with value-added services, including 1,784 pharmacies, 1,244 in-store branded coffee shops and 393 adjacent fuel centers. Complementary to its network of stores, it also provides a set of digital offerings, including home deliveries, click and collect store pickup, and online prescription refills. Albertson's popular Own Brands label, O Organics, has become a \$1 billion brand, a major milestone for one of the nation's largest brands of USDA-certified organic products. In 2017, Albertsons acquired Plated, a premier meal kit service, and MedCart Specialty Pharmacy.

**Army Air Force Exchange****Date founded:** 1895**Headquarters:** Dallas, Texas**Workforce:** 34,000**Number of retail locations:** 3100+

Summary: The Exchange is a multi-channel retailer that procures merchandise from suppliers around the world to meet the consumer demands of active duty military, National Guard members, reservists and retirees. The Exchange operates more than 2,700 facilities, including department and convenience stores, gas stations, restaurants, theaters, and other specialty retail businesses on military installations in all 50 states, five U.S. territories and 36 countries. The Exchange also maintains an online ecommerce site, which was expanded in late 2017 to include all honorably discharged veterans.

**AT&T Wireless****Date Founded:** 1983**Headquarters:** Dallas, Texas**Workforce:** 264,530**Number of retail locations:** 16,000

Summary: AT&T is a world leader in communications, technology, media and entertainment. AT&T has more than 16,000 retail locations in the U.S., including company-owned stores and kiosks, authorized dealers and third party retailers; Best Buy, Wal-Mart, Costco and Radio Shack. In 2017, AT&T launched a free HBO offer to subscribers on the AT &T Unlimited Plus wireless plan. The plan was upgraded to the AT&T Unlimited Choice plan allowing customers to add DirecTV Now's "Live a Little" package with about 60 live TV channels, including local stations, for an additional \$10 per month.



AutoZone



Date founded: 1979

Headquarters: Memphis, Tennessee

Workforce: 65,000

Number of retail locations: 5514 United States & Puerto Rico

Summary: AutoZone is a leading retailer and a leading distributor of automotive replacement parts and accessories in the United States. It serves customers in 48 states, Mexico and Puerto Rico. Each AutoZone store carries an extensive product line for cars, sport utility vehicles, vans and light trucks, including new and remanufactured automotive hard parts, maintenance items, accessories, and non-automotive products.

Bass Pro Shops



Date founded: 1972

Headquarters: Springfield, Missouri

Workforce: 22,000

Number of retail locations: 100 in US and Canada

Summary: Bass Pro Shops is a supplier of outdoor gear for enthusiasts of fishing, hunting, camping and golfing. The company has 94 retail stores in the U.S. and Canada. The company is known for its Outdoor World stores-- massive facilities that combine a large selection of goods with amusement features, such as target ranges, fish tanks, restaurants and video arcades. The original Outdoor World is located in Springfield and has become the single most popular tourist destination in the state of Missouri. The company also owns Tracker Marine, which manufactures and sells boats for fishermen, and Big Cedar Lodge, a resort in the Ozark Mountains. In September of 2017, Bass Pro Shops completed their purchase of Cabelas for \$4 billion dollars.

Belk



Date founded: 1888

Headquarters: Charlotte, North Carolina

Workforce: 25,000

Number of retail locations: 300

Summary: Belk, Inc., is the nation's largest privately owned department chain with over 300 stores located primarily in the southeastern United States. Belk carries an assortment of moderately priced national brands and private-label fashion; shoes and accessories for the entire family, along with top-name cosmetics, a wedding registry and Southern style for the home. The company was acquired by private-equity firm Sycamore Partners in December 2015.

Big 5 Sporting Goods



Date founded: 1955

Headquarters: El Segundo, California

Workforce: 9,000

Number of retail locations: 433

Summary: Big 5 Sporting Goods Corporation is a leading sporting goods retailer in the western United States, offering a broad selection of traditional sporting goods, including athletic shoes, apparel and accessories, outdoor and athletic equipment, and an extensive product mix of fitness, camping, hunting, fishing, tennis and golf items. Its e-commerce platform also offers products online. Big 5's E-Team offers customers weekly email specials and ad specials.

Big Lots



Date founded: 1967

Headquarters: Columbus, Ohio

Workforce: 35,100

Retail locations: 1,426

Summary: Big Lots offers an assortment of brand-name items and products, including food, furniture, seasonal items, electronics and accessories, home décor, toys and gifts, and has 1,426 stores in 47 states and the District of Columbia. Merchandise is typically priced 20 to 40 percent below most discount retailers and up to 70 percent below traditional retailers. Its five major distribution centers have nearly 9 million square feet of space and use highly automated systems to receive, prepare, load and ship merchandise. Additionally, it uses common dedicated carriers and various third-party carriers to provide service to its stores, moving merchandise through the distribution system in a timely fashion.

BJ's Wholesale Club



Date founded: 1984

Headquarters: Westborough, Massachusetts

Workforce: 25,000+team members

Number of retail locations: 215

Summary: BJ's Wholesale Club is a membership-only warehouse chain that operates over 210 stores in 16 locations throughout the eastern United States. It offers a one-stop shopping destination filled with top-quality, leading brands, including its exclusive Wellesley Farms® and Berkley Jensen® brands, along with USDA Choice meats, premium produce and organics. In addition, BJ's Gas has over 133 locations in 16 states. BJ's is also the only major membership warehouse club to accept all manufacturers' coupons and offers the most payment options. In July 2017, the company announced a new mobile site, making it even easier for members to browse, research and save on their purchases.

Burlington Coat Factory**Date founded:** 1972**Headquarters:** Burlington, New Jersey**Workforce:** 30,095**Number of retail locations:** 631

Summary: Burlington is a national off-price retailer offering style for less at up to 65 percent off other retailers' prices. Departments include ladies' dresses, suits, sportswear, juniors, accessories, menswear, family footwear and children's clothing. It also includes an assortment of furniture and accessories for baby at Baby Depot, home décor and gifts, along with the largest selection of coats in the nation for the entire family. Burlington has 629 stores in 45 States and Puerto Rico.

Cabela's**Date Founded:** 1961**Headquarters:** Sidney, Nebraska**Workforce:** 19,700**Number of retail locations:** 75

Summary: Cabela's is a long-standing specialty retailer and the world's largest direct marketer of hunting, fishing, camping and outdoor-related merchandise. The company produces nearly 100 different catalogs per year, including specialty books focusing on such outdoor pursuits as archery, fly-fishing and boating. Internationally known as a source of affordable, high-quality outdoor equipment, Cabela's catalogs are shipped to all 50 states and 125 countries. It also maintains an outdoor fund to support and promote the outdoors. In 2017, Bass Pro Shops acquired Cabela's for \$4 billion dollars.

Crate and Barrel**Date founded:** 1962**Headquarters:** Northbrook, Illinois**Workforce:** 8300**Number of retail locations:** 100+

Summary: Crate and Barrel is an U.S. based industry-leading home furnishings specialty retailer, known for its exclusive designs, excellent value and superb customer service. Owned by the Otto Group, of Hamburg, Germany, Crate and Barrel sells its products via stores, catalogues and a on the web. Other brands within Crate and Barrel include CB2, a modern and affordable home furnishings and accessories destination, and The Land of Nod, a children's home furnishings and accessories retailer.

Dick's Sporting Goods**Date founded:** 1948**Headquarters:** Pittsburg, Pennsylvania**Workforce:** 27,550**Number of retail locations:** 715

Summary: Dick's Sporting Goods is a publicly traded Fortune 500 sporting-goods company specializing in the retail sales of sports equipment, apparel, footwear and accessories. Dick's also owns and operates Golf Galaxy and Field & Stream specialty stores, and Dick's Team Sports HQ, an all-in-one youth sports digital platform that offers free league management services, mobile scheduling, communications and live scorekeeping applications, custom uniforms and FanWear. Its product mix is also offered through a content-rich e-commerce platform that is integrated with its store network providing customers with the convenience and expertise of a 24-hour storefront.

Dillard's**Date founded:** 1938**Headquarters:** Little Rock, Arkansas**Workforce:** 30,800**Number of retail locations:** 268

Summary: Dillard's ranks among the nation's largest fashion retailers with 293 stores, including 24 clearance centers in 29 states, primarily in the Southwest, Southeast and Midwest regions of the United States. Dillard's stores offer a broad selection of merchandise and features products from both national and exclusive brand sources. Dillard's focuses on delivering style, service and value to its shoppers by offering compelling apparel, cosmetics and home selections complemented by exceptional customer care.

Family Dollar Stores**Date founded:** 1959**Headquarters:** Charlotte, North Carolina**Workforce:** 60,000**Number of retail locations:** 7,900

Summary: One of the nation's fastest growing retailers, Family Dollar offers a wide range of merchandise at low prices ranging from household cleaners to name brand foods, health and beauty aids, toys, apparel and home fashions. Family Dollar targets a lower income customer in urban and rural locations pricing many items at \$1 or less with most items priced below \$10.00. Its stores continue to operate using multiple price points, serving customers as their "neighborhood discount store," offering a convenient shopping experience.

Foot Locker

Date founded: 1974

Headquarters: New York City, New York

Workforce: 50,168

Number of retail locations: 1,015

Summary: Foot Locker is a leading global athletic footwear and apparel retailer, with 3,363 stores in 23 countries under the brand names, Foot Locker, Champs Sports, Kids Foot Locker, Footaction, SIX:02, Lady Foot Locker, Runners Point, East Bay and Sidestep. Its stores offer the latest in athletically-inspired footwear and apparel, from leading athletic brands products for a wide variety of activities, including basketball, running, and training. Additionally, Foot Locker operates the 178 House of Hoops, a shop-in-shop concept, which sells premier basketball-inspired footwear and apparel. In 2017, Nike and Foot Locker collaborated on Sneakeasy, a new pop-up store in Manhattan that offers a curated selection of Nike and Jordan products.



Foot Locker

The Fresh Market

Date founded: 1982

Headquarters: Greensboro, North Carolina

Workforce: 12,600

Number of retail locations: 176

Summary: The Fresh Market is a specialty grocer with 176 locations in 24 states across the United States. Its focus is on seasonally fresh produce, quality meat and seafood, signature baked goods and a variety of organic options. Acquired by the private equity giant Apollo Global Management in 2016, The Fresh Market has struggled in the past year, closing several stores, and prompting management to re-position the grocer as more mainstream in existing markets.



GameStop

Date founded: 1996

Headquarters: Grapevine, Texas

Workforce: 23,000

Number of retail locations: 7,500+

Summary: GameStop is a global, multichannel video game, consumer electronics and wireless services retailer, operating more than 7,200 stores across 14 countries. The company's consumer product network also includes an e-commerce website, Game Informer® magazine, and ThinkGeek, the premier retailer for the global geek community featuring exclusive and unique video game and pop culture products. In 2017, GameStop introduced the \$60 PowerPass subscription service, which allowed gamers to checkout second hand games for unlimited six-month play, but despite its popularity was pulled off the shelf because of limitations of GameStop's point-of-sale system.



Gap

Date founded: 1969

Headquarters: San Francisco, California

Workforce: 150,000+

Number of retail locations: 3300

Summary: Gap Inc. is a leading global retailer offering clothing, accessories, and personal care products for men, women and children under the Old Navy, Gap, Banana Republic, Intermix and Athleta brands. Its branded clothes are available in 90 countries worldwide through 3,300 company-operated stores, 400 franchise stores and e-commerce sites. In 2017, Gap CEO Art Peck announced that 200 Gap and Banana Republic stores would be closing their mall locations. Instead, the company will concentrate on expanding its Old Navy and Athleta chain with an estimated projection of 270 new stores in 2020.



Giant Eagle

Date founded: 1918

Headquarters: Pittsburg, Pennsylvania

Workforce: 36,000

Number of retail locations: 410

Summary: Giant Eagle is a regional supermarket chain that operates more than 410 Giant Eagle, Market District and GetGo retail locations throughout Ohio, Pennsylvania, West Virginia, Maryland and Indiana. In addition to providing customers with high-quality foods and a great overall value, the majority of Giant Eagle supermarkets feature convenience services like pharmacies, in-store banking and dry cleaning. Giant Eagle is one of the 40 largest privately-held and family-operated companies in the USA. The grocer offers Curbside Express pick-up in 27 of its stores. Giant Eagle has partnered with Deliv, to power scheduled home delivery for its customers initially rolling out the Deliv Fresh service in four markets: Columbus, Cleveland, Indianapolis and Pittsburgh.



Grocery Outlet

Date founded: 1946

Headquarters: Emeryville, California

Workforce: 1,000

Number of retail locations: 280+

Summary: Grocery Outlet operates more than 280 deep-discount supermarkets in half a dozen western states, primarily in California, Idaho, Nevada, Oregon, and Washington and Pennsylvania. Each stores sells a wide range of name-brand products and groceries at 50 percent less cost than traditional supermarket chains. It is the nation's largest retailer of excess inventories relying on a business model of "opportunistic buying" which involves sourcing and purchasing products outside the traditional retail channel made available because of packaging changes, product overruns and surplus inventories.



H&M**Date founded:** 1947**Headquarters:** Stockholm, Sweden**Workforce:** 171,000**Number of retail locations:** 4700

Summary: The H&M group is a global fashion and design company whose mission is to offer quality fashion for men, women and teenagers, at the best price in a sustainable way. The H&M group comprises six independent brands: H&M, COS, Cheap Monday, Monki, Weekday and & Other Stories. Sustainability is an integral part of H&M's business model. H&M's iCollect program allows shoppers to bring in bags of their old clothing in return for a 15-percent-off coupon. H&M welcomed 10,000 new colleagues in 2017, taking the total number of employees to 171,000. Beginning in 2018, H&M will begin selling on Alibaba's Tmall, increasing its presence on the Chinese e-commerce website.

**Harris Teeter****Date founded:** 1936**Headquarters:** Matthews, North Carolina**Workforce:** 30,000**Number of retail locations:** 230

Summary: Harris Teeter, a subsidiary of Kroger, Inc., operates over 230 stores and 14 fuel centers in seven states and the District of Columbia. In addition to its retail stores, Harris Teeter also owns grocery, frozen food and perishable distribution centers in North Carolina. While the company maintains stores in both urban and rural areas, Harris Teeter's primary focus is on an upscale urban clientele with a taste for quality and variety in food. In 2017, the grocer announced it was partnering with Myxx to launch a fully-integrated omnichannel shopping experience enabling customers to translate online recipes into dynamic shopping lists and buy groceries via one customized site.

**H-E-B****Date founded:** 1905**Headquarters:** San Antonio, Texas**Workforce:** 100,000+ United States and Mexico**Number of retail locations:** 388

Summary: H-E-B operates a chain of 388 supermarkets in Texas and Mexico. It is the nation's 15th largest grocery store chain in terms of revenue. The H-E-B chain includes large format grocery and pharmacy stores, as well as H-E-B Pantry convenience stores, which are smaller and feature extra-low prices. Approximately 60 H-E-B locations offer self-service Gas N Go gasoline islands. The company also manufactures its own plastic bottles and operates a photofinishing laboratory. H-E-B is the largest privately held employer in the state of Texas and one of the largest privately held retailers in the nation.

**Hy-Vee****Date founded:** 1930**Headquarters:** West Des Moines, Iowa**Workforce:** 85,000**Number of retail locations:** 240

Summary: Hy-Vee is an employee-owned supermarket chain with more than 240 stores located in eight Midwestern states: Iowa, Illinois, Missouri, Kansas, Nebraska, South Dakota, Minnesota and Wisconsin. Currently just under half of its 244 stores have either full-service Market Grille restaurants or limited-service Market Grille Express. In 2017, Hy-Vee increased the number of its stores with prepared foods and has plans to add several dozen new restaurant locations. Announcing a partnership with celebrity Mark Wahlberg, the company plans to open 26 Wahlburgers outlets in select Hy-Vee stores in the Midwest.

**IKEA North America****Date founded:** 1985**Headquarters:** Conshohocken, Pennsylvania**Workforce:** 6,300**Number of retail locations:** 56

Summary: IKEA North America is a privately held, international home products company that designs and sells ready-to-assemble furniture such as beds, chairs, desks, appliances and home accessories and is the world's largest furniture retailer. In 2017, IKEA introduced IKEA Place, an augmented reality app for the Apple Computer's iOS 11 operating system, that uses augmented reality to assist customers in visualizing how a piece of IKEA furniture will look in their apartments, offices and homes. IKEA's commitment to embrace sustainability was demonstrated recently by the purchase of 25,000 acres of forest property in Alabama.

**J. C. Penney****Date founded:** 1902**Headquarters:** Plano, Texas**Workforce:** 100,000+ worldwide**Number of retail locations:** 875

Summary: J.C. Penney is one of the nation's largest apparel and home furnishings retailer with 875 stores in the United States and Puerto Rico. J.C. Penney stores also feature in-house hair salons, auto and optical centers, and professional portrait studios, and multiple Sephora outlets. In 2017, the company rolled out Apple Pay to all of its customers and introduced its "Project Runway" brand of women's contemporary fashion line.



J. Crew**Date founded:** 1983**Headquarters:** New York, New York**Workforce:** 14,500**Number of retail locations:** 269

Summary: J.Crew is an internationally recognized American retailer of women's, men's and children's apparel, shoes and accessories. Originally pegged as preppy, its long-standing fashion platform relies on tradition and style for its loyal fan base. The J. Crew retail mix includes J. Crew with 278 stores, and its sister company, Madewell, with 115 stores all in the United States. In addition, J.Crew maintains a robust online and catalog business. In an effort to streamline its mobile ordering process, J.Crew adopted Google's Payment Request API that allows online shoppers to auto-populate shipping fields when checking out.

J.CREW

Jordan's Furniture**Date founded:** 1928**Headquarters:** Taunton, Massachusetts**Workforce:** 1400**Number of retail locations:** 6

Summary: Jordan's Furniture offers the largest selection of quality name-brand furniture and mattresses in Connecticut, Massachusetts, New Hampshire and Rhode Island. Each store offers a unique experience including IMAX movies and ropes course. Every year Jordan's gives back to the New England community through the Massachusetts Adoption Resource Exchange (MARE) and the Massachusetts Department of Children & Families (DCF) to help find permanent families for children in state foster care.

Jordan's
FURNITURE**Kinney Drugs****Date Founded:** 1903**Headquarters:** Gouverneur, New York**Workforce:** 3,000**Number of retail locations:** 100

Summary: Kinney Drugs, a subsidiary of KPH Healthcare Services, Inc., is a chain of 100 full-service employee-owned drug stores in New York and Vermont. As the 4th largest chain drug retailer in the United States, Kinney Drugs fills nearly 8 million prescriptions annually. Each store offers a wide array of professional services including immunizations, medication therapy management (MTM), automatic refills (ReadyScripts), medication synchronization (EZSync), pick up reminders, and free prescription delivery. In 2017, Kinney Drugs acquired two new drugstores in Vermont. The Kinney Drugs Foundation donates \$8 million annually to charitable organizations.

KinneyDrugs®

Kmart**Date founded:** 1899**Headquarters:** Hoffman Estates, Illinois**Workforce:** 45,000**Number of retail locations:** 610

Summary: Kmart, a subsidiary of Sears Holding Corporation, offers consumers quality products through a portfolio of exclusive brands that include Jaclyn Smith, Joe Boxer, Route 66 and Smart Sense. Kmart is a participant in shopyourway.com, a social shopping experience where members have the ability to earn points and receive benefits across a wide variety of physical and digital formats. Hundreds of Kmart stores were closed in 2017 due to a rapid decline in sales.

K
kmart.**L Brands****Date founded:** 1963**Headquarters:** Columbus, Ohio**Workforce:** 88,000**Number of retail locations:** 3,075

Summary: L Brands is an international company that operates 3,075 company-owned specialty stores in the United States, Canada, United Kingdom, Ireland and greater China through stores and its brands are sold in more than 800 additional franchised locations worldwide. The product mix includes lingerie, personal care and beauty products, apparel and accessories through its Victoria's Secret, PINK, Bath & Body Works, La Senza and Henri Bendel stores. The company's products are also available online at www.VictoriasSecret.com, www.BathandBodyWorks.com, www.HenriBendel.com and www.LaSenza.com.

Lbrands

Lumber Liquidators**Date founded:** 1993**Headquarters:** Toano, Virginia**Workforce:** 1,000**Number of retail locations:** 389

Summary: Lumber Liquidators has one of the largest inventories of prefinished and unfinished hardwood floors in the industry. The company carries solid and engineered hardwood, laminate bamboo, cork, vinyl, and wood-look tile flooring, in addition to butcher blocks, moldings, accessories and tools in 389 stores in 46 states. The environmentally conscientious company only purchases from suppliers who practice sustainable harvesting, and negotiates directly with each mill, thereby eliminating the middleman and passing the savings on to its customers.

LUMBER
LIQUIDATORS

Menards**Date founded:** 1958**Headquarters:** Eau Claire, Wisconsin**Workforce:** 45,000**Number of retail locations:** 300

Summary: Menards is the nation's third-largest home improvement chain, selling lumber, hardware, tools, paint and lawn and garden items in 300 stores throughout the Midwest. It prides itself on being a low-cost leader. Each store offers its customers assistance in home projects through its Design-It Center and Project Calculator programs. Menards is also involved in residential real estate development, with several large subdivisions under construction and development in Indiana and Illinois.

**Newegg.com****Date founded:** 2001**Headquarters:** City of Industry, California**Workforce:** 2,168**Number of retail locations:** Online only

Summary: NewEgg.com is one of the top online retailers in the United States with over 25 million registered users. Its website offers customers a comprehensive selection of the latest consumer electronics products, detailed product descriptions and images, "how-to" information and customer reviews. In 2017, the company announced plans to expand its global reach to dozens of countries in key parts of Asia Pacific, Europe, Latin America and the Middle East. Once complete, Newegg will reach customers in a total of 50 countries.

**Michaels Stores****Date founded:** 1962**Headquarters:** Irving, Texas**Workforce:** 48,900**Number of retail locations:** 1,367

Summary: Michaels Stores is a specialty retailer of arts, crafts, framing, floral and seasonal merchandise for the hobbyist and do-it-yourself home decorator. It operates 1,367 stores in 49 states and Canada and 109 Aaron Brothers Stores. In addition to their retail outlets, Michael's also owns Artistree, a manufacturer of high quality custom and specialty framing merchandise, and Darice, a premier wholesale distributor in the craft, gift and decor industry. Approximately 57 percent of net sales are from Michael's private brands. Michael's also maintains a healthy online platform, which promotes social networking and includes expert tips, project ideas, marketing content and information about upcoming in-store events.

**Nike****Date founded:** 1964**Headquarters:** Beaverton, Oregon**Workforce:** 74,000**Number of retail locations:** 1,142 worldwide; 384 in United States

Summary: Nike designs, develops, markets and sells athletic footwear, apparel, equipment and accessories worldwide under the Nike, Jordan, Hurley and Converse brands through wholesale, retail stores and ecommerce, independent distributors and licensee channels. In 2017, Nike solidified a partnership with Amazon to sell its products. Nike continues to pursue a strategic shift to connect personally with their consumers through premium products, experiences and services. As such, a new 69,000 square foot flagship is planned to open in New York City in early 2019.

**Neiman Marcus****Date founded:** 1907**Headquarters:** Dallas, Texas**Workforce:** 13,700**Number of retail locations:** 42

Summary: The Neiman Marcus Group is a leading purveyor of the world's most unique luxury goods from upscale apparel and accessories, to beauty and decorative home products. Neiman Marcus announced its launch of a new "digital first" strategy that integrates new sales staff technology for better use of customer data and analytics. Once established, staff will be able to search individual customer preferences and browsing history to create outfits and deliver their suggestions via text messages.

**Old Navy****Date founded:** 1994**Headquarters:** San Francisco, California**Workforce:** 65,000**Number of retail locations:** 1,000+ worldwide

Summary: Old Navy, a member of the Gap, Inc.'s retail family is an apparel and accessory retailer specializing in outfitting women, men, teens, children and babies with affordable and fashionable clothing. In 2017, Old Navy was named one of the "Best Workplaces in Retail" and "Best Workplaces for Diversity" by Fortune Magazine.



Overstock.com**Date founded:** 1999**Headquarters:** Salt Lake City, Utah**Workforce:** 1,800**Number of retail locations:** N/A online

Summary: Overstock.com offers a variety of products including home goods, jewelry, electronics and apparel, as well as a marketplace providing customers access to hundreds of thousands of products from third-party sellers. Additional stores include Pet Adoptions and Worldstock.com dedicated to selling artisan-crafted products from around the world. In 2017, Overstock announced the formation of a new online platform, Cars by Overstock, a one-stop-shop for automotive research, purchasing, financing and protection plans. The full-service platform helps customers navigate every aspect of the car buying process, starting with the ability to research their purchase using up-to-date vehicle data, popular articles and in-depth video reviews.

**Petco****Date founded:** 1965**Headquarters:** San Diego, California**Workforce:** 25,000+**Number of retail locations:** 1,500

Summary: Petco is a specialty retailer of pet food, live animals, supplies and services. It operates more than 1,500 locations across the U.S., Mexico and Puerto Rico, including more than 85 Unleashed by Petco locations, a smaller format neighborhood shop. Petco also offers prescription services and pet supplies through veterinary-operated pet product supplier Drs. Foster & Smith. The Petco Foundation, an independent nonprofit organization, has invested more than \$200 million since it was created in 1999 to help promote and improve the welfare of companion animals. In 2017, Petco continued its aggressive plan of opening new retail outlets and remodeling many others.

**PetSmart****Date founded:** 1986**Headquarters:** Phoenix, Arizona**Workforce:** 55,000**Number of retail locations:** 1500

Summary: PetSmart is a full-service retail, veterinary, grooming and training destination for household pets, specializing in the sale of food and supplies for the lifetime needs of pets. It has over 1500 locations in the United States, Canada and Puerto Rico. In 2017, PetSmart opened 28 new stores in the U.S. and Canada. This adds to the 35 new stores opened in the first half of the fiscal year, bringing the year-to-



date total to 63. In an effort to accelerate the company's efforts to sell pet products and services both in physical stores and online in North America, PetSmart bought Chewy, an online pet food and products retailer.

Pier 1 Imports**Date founded:** 1962**Headquarters:** Ft. Worth, Texas**Workforce:** 20,000**Number of retail locations:** 1,000

Summary: Pier 1 Imports operates more than 1,000 stores in North America, including locations in all 50 states and across Canada. Pier 1 is an omnichannel retailer specializing in imported home furnishings and decor, particularly furniture, tabletop items, decorative accessories and seasonal decor. Despite numerous store closings in 2017, Pier 1 is investing more resources into growing its e-commerce business.

**Publix****Date founded:** 1930**Headquarters:** Lakeland, Florida**Workforce:** 188,000**Number of retail locations:** 1,173

Summary: Publix is the largest employee-owned grocery chain in the United States with 1,174 locations in seven states. Publix is repeatedly named one of the best companies to work for and consistently rated as a leader in customer service. Each store provides specific products and services in its grocery, deli, bakery, produce, floral, meat and seafood departments. Some stores have valet parking, cafés, sushi bars and pharmacy departments. Publix announced it would be regenerating its GreenWise store concept by redesigning its current format of specialty, organic and natural products and expanding with locations outside of Florida.

**REI****Date founded:** 1938**Headquarters:** Kent, Washington**Workforce:** 12,000**Number of retail locations:** 154

Summary: REI, a.k.a. Recreational Equipment, Inc., is organized as a consumers' cooperative, selling sporting goods, camping gear, travel equipment and clothing in 154 locations in the United States. REI's mission is to inspire, educate and outfit its customers for a lifetime of adventure and stewardship. Members may join for an annual fee of \$20.00 and be granted voting privileges for the board of directors and share in the co-op's profits through an annual member refund based upon purchases. Its #OptOutside campaign to close stores on Black Friday, continues to raise awareness about societal health in this country.



Rite Aid**Date founded:** 1962**Headquarters:** Camp Hill, Pennsylvania**Workforce:** 89,000**Number of retail locations:** 4,600

Summary: Rite Aid is a drug store chain with 4,600 locations in 31 states across the country and the District of Columbia. It operates under two segments: retail pharmacy and pharmacy services. The retail pharmacy segment consists of Rite Aid stores, RediClinic and Health Dialog and sells brand and generic prescription drugs, an assortment of front-end products, including health and beauty aids, personal care products, seasonal merchandise, and a private brand product line. The pharmacy services arm includes EnvisionRx, which provides a range of pharmacy benefit services. In 2017, Walgreen's was set to acquire all of the Rite Aid stores, but settled on 1,932 stores instead. In February 2018, Albertsons announced a definitive merger with the drug store chain.

**Ross****Date founded:** 1957**Headquarters:** Dublin, California**Workforce:** 78,600**Number of retail locations:** 1,412

Summary: Ross is the largest off-price apparel and home fashion chain in the United States with 1,363 locations in 37 states, the District of Columbia and Guam. It operates under two brands, Dress For Less and dd's Discount. Ross offers first-quality, in-season, name brand and designer apparel, accessories, footwear and home fashions for the entire family at savings of 20 – 60 percent off department and specialty store regular prices.

**Safeway****Date founded:** 1915**Headquarters:** Pleasanton, California**Workforce:** 265,000**Number of retail locations:** 2,200

Summary: The full-service grocery retailer, which merged with Albertsons in 2015, has stores in 19 states and is now the second largest food and drug retailer in the United States. It thrives in part, due to its O Organics private label and continuing investment in technology. In addition to offering one-hour delivery windows, its mobile app, Just for U gives shoppers coupons and personalized savings.

**Sears****Date founded:** 1886**Headquarters:** Hoffman Estates, Illinois**Workforce:** 140,000**Number of retail locations:** 594

Summary: Sears offers its wide range of home merchandise, apparel and automotive products and services through Sears-branded and affiliated full-line and specialty retail stores in the United States. As of October 28, 2017, Sears operated 1,104 retail locations; 572 full-line and 22 specialty stores, for a total of 594 in all 50 states, Puerto Rico, and Guam. In addition, Sears offers a variety of merchandise and services through sears.com, landsend.com and specialty catalogs. The company is the nation's largest provider of home services, with more than 14 million service and installation calls made annually. Sears agreed to sell its trusted Kenmore line on Amazon last July and is integrating is integrated Amazon's virtual assistant, Alexa, into its line of Kenmore Smart appliance products.

Sephora**Date founded:** 1970**Headquarters:** San Francisco, California**Workforce:** 2,300 worldwide**Number of retail locations:** 300 in the Americas; 475 outlets

Summary: Sephora is an open-concept cosmetic retailer with over 300 stand-alone stores 475 outlets in JC Penney stores throughout the United States. A spin-off of the France-based Sephora, the chain offers more than 200 brand name make-up, fragrances and skin care products, including its own private Sephora label. Customers are encouraged to sample any of the items in a self-service atmosphere. Sephora maintains a high-volume of loyal online customers, and in 2017 introduced its newest digital endeavor, the Beauty Insider Community, a loyalty, member-only mobile and online platform, that combines inspiration and recommendations in a "real talk" social setting. J.C. Penney and Sephora announced they will add 70 new Sephora "store-within-a-store" locations within J.C.Penney and will expand the 32 existing spaces by 50 percent in 2017.

SEPHORA

Sharper Image.com**Date founded:** 1977/ Relunched 2010**Headquarters:** Farmington Hills, Michigan**Workforce:** Not listed**Number of retail locations:** Online only

Summary: Sharper Image originated as a product catalog in 1977 and was re-launched in 2010 as an e-commerce platform that provides its consumers with innovative home electronics, air purifiers and other lifestyle products. Its products are categorized into topics including personal care, living, toys and games and personal care items. It also provides its users with informative video clips, customer product ratings and reviews, convenient order tracking, and access to real-time customer support.

SHARPER IMAGE

Sherwin-Williams

Date founded: 1866

Headquarters: Cleveland, Ohio

Workforce: 42,500

Number of retail locations: 4,100

Summary: Sherwin-Williams is a global leader in the manufacture, development, distribution and sale of paints, coatings and related products to professional, industrial, commercial and retail customers. Sherwin-Williams® branded products are sold exclusively through a chain of more than 4,100 company-operated stores and facilities, while the company's other brands are sold through leading mass merchandisers, home centers, independent paint dealers, hardware stores, automotive retailers and industrial distributors. In 2017, Sherwin-Williams acquired Valspar Paints for \$11.03 billion dollars.



Stater Bros.

Date founded: 1936

Headquarters: San Bernardino, California

Workforce: 18,000

Number of retail locations: 171

Summary: Stater Bros. Markets is a privately held supermarket discount chain serving the Southern California market. The San Bernardino-based supermarket is known for staff courtesy, store cleanliness, competitive prices, and the quality of meat and poultry. It was ranked No. 9 by Consumer Report's annual readers' survey as the best place to shop for groceries. In 2017, Slater Bros. announced a partnership with Instacart online grocery ordering and home delivery service as a convenience to their customers.



Staples

Date founded: 1986

Headquarters: Framingham, Massachusetts

Workforce: 1,572 in North America 75,192 worldwide

Number of retail locations: 1575 United States

Summary: Staples, the first office supply superstore in the United States was purchased in 2017 by Sycamore, Partners, a private equity firm, has over 1575 locations in the United States. Its product mix goes beyond office supplies and includes furniture, technology, to include a business services division, Staples Business Advantage. Staples Price Match guarantee program offers customers a refund and a 10 percent discount on purchases if they find a less expensive price elsewhere.



Starbucks

Date founded: 1971

Headquarters: Seattle, Washington

Workforce: 300,000 +

Number of retail locations: 27,339 worldwide

Summary: Starbucks is the world's largest coffee chain, which currently operates over 23,000 locations on six continents and in 75 countries and territories. The international coffeehouse king also sells its coffee, specialty beverages, packaged coffees, single-serve coffee products, and a focused selection of merchandise through company-oriented and licensed stores. Starbucks regularly introduces new, visually appealing drinks that are only available for a limited time, such as 2017's Unicorn Frappuccino. The colorful drinks have given Starbucks widespread social media power. However, in an effort to simplify its sales channels, Starbucks announced in 2017 that they would be discontinuing their online store so that consumers could experience a more personal shopping experience in one of their stores.



TJX

Date founded: 1976

Headquarters: Framingham, Massachusetts

Workforce: 235,000 worldwide

Number of retail locations: 3,800 worldwide

Summary: TJX is the leading off-price retailer of apparel and home fashions in the U.S. and worldwide. U.S. TJX companies include: T.J. Maxx, Marshalls, HomeGoods, Sierra Trading Post and Homesense. All TJX's stores offer a rapidly changing assortment of brand name, designer and other high-quality merchandise at prices generally 20-60 percent below comparable department and specialty store prices, attracting a broad range of fashion and value conscious customers across many income levels and demographic groups. In 2017, TJX introduced HomeSense, a new general store concept offering on-trend merchandise with expanded departments including large-scale furniture, lighting and art, in Canada and select locations within the United States.



Toys "R" US

Date founded: 1948

Headquarters: Wayne, New Jersey

Workforce: 65,000

Number of retail locations: 885

Summary: Toys "R" Us, is the world's leading dedicated toy and baby products retailer with merchandise sold in 885 Toys "R" Us and Babies "R" Us stores in the United States, Puerto Rico and



Guam. With its strong portfolio of e-commerce sites including Toysrus.com and Babiesrus.com, the company provides shoppers with a broad online selection of distinctive toy and baby products. However, in 2017, the company experienced a severe downturn in sales and filed for bankruptcy in March.

Tractor Supply Company



Date founded: 1938

Headquarters: Brentwood, Tennessee

Workforce: 26,000

Number of retail locations: 1665

Summary: Tractor Supply Company is the country's largest operator of rural lifestyle retail stores with 1,665 locations in 49 states and an ecommerce site. Each store's focus is on supplying the lifestyle needs of recreational farmers, ranchers, tradesmen and small businesses, as well as those who simply enjoy a country lifestyle. Tractor Supply's product mix includes a comprehensive selection of merchandise for equine, livestock, pet and small animals, hardware, truck, towing and tool products. It also sells seasonal products, including heating, lawn and garden items, power equipment, gifts and toys, work/recreational clothing and footwear, maintenance products for agricultural and rural use. Tractor Supply Company owns and operates Petsense, a small-box pet specialty supply retailer focused on meeting the needs of pet owners, primarily in small and mid-size communities, and offering a variety of pet products and services. At July 1, 2017, the Company operated 160 Petsense stores in 26 states.

Trader Joes



Date Founded: 1958

Headquarters: Monrovia, California

Workforce: 38,000+

Number of Retail Locations: 474 (as of October 12, 2017)

Summary: Trader Joe's operates a chain of grocery stores throughout the United States that are reputed for their low-cost, fresh, natural and specialty-driven merchandise. Its inventory changes frequently, revolving around seasons and holidays. Each store provides bakery products, beverages, cheeses and meats, frozen products, produce and flowers, sweets, supplements and personal care items. In 2017, Trader Joe's opened 14 new locations. This number is down from the average 23 stores opened a year in the past decade. Trader Joe's stocks about 4,000 items, 80 percent of which are its own private labels.

True Value



Date founded: 1948

Headquarters: Chicago, Illinois

Workforce: 2500

Number of retail locations: 4,000

Summary: True Value Company operates as a member-owned wholesaler cooperative of hardware and related merchandise in the United States and internationally. Its 4,000 retail locations manufacture and sell paint and paint applicators. In addition, the company offers value-added services, such as marketing, advertising, merchandising, and store location and design services. The company sells its products primarily to hardware retailers, industrial distributors, garden centers and rental retailers. True Value Foundation is focusing its primary efforts on underserved youth and improving the lives of children, with an emphasis on education and community vitality. Through year-round volunteerism, True Value Company employees give back to the community with mentorship and service to the Boys & Girls Clubs and United Way agencies.

Ulta Beauty Salon Cosmetics and Fragrance



Date founded: 1990

Headquarters: Bolingbrook, Illinois

Workforce: 21,700

Number of retail locations: 1,058

Summary: Ulta is the largest beauty retailer in the United States and is regarded as the premier beauty destination for cosmetics, fragrance, skin and hair care products and salon services. Its slogan, "All Things Beauty" represents 20,000 products from approximately 500 well-established and emerging beauty brands across all categories and price points, including Ulta Beauty's own private label. Ulta Beauty also offers a full-service salon in every store featuring hair, skin and brow services. Ulta Beauty's Ulta Rewards loyalty program.

Under Armour



Date founded: 1996

Headquarters: Baltimore, Maryland

Workforce: 15,800

Number of retail locations: 144 factory stores/29 brand houses

Summary: Under Armour, Inc., is the originator of performance footwear, apparel and equipment engineered to keep athletes cool, dry and light throughout the course of a game, practice or workout. The technology behind Under Armour's diverse product assortment for men, women and youth includes for reaping the HeatGear®, ColdGear® and AllSeasonGear®. Under Armour introduced its subscription box service, ArmourBox, in 2017, which includes four to six items curated by a "dedicated Official Outfitter" and sent every 30, 60 or 90 days as chosen by the customer.

Urban Outfitters**Date founded:** 1970**Headquarters:** Philadelphia, Pennsylvania**Workforce:** 24,000**Number of retail locations:** 200+

Summary: Urban Outfitters, Inc., is a global lifestyle consumer brand offering millennials a variety of merchandise and consumer products through 242 Urban Outfitters stores in the United States, Canada and Europe. Urban Outfitters Rewards is an online and mobile retention program that allows members to earn rewards for every purchase, social share or visit to the physical store. It maintains a strong social media community via several channels of social media. Its secondary retail brands include Anthropologie and Free People.

URBAN OUTFITTERS**Victoria's Secret****Date founded:** 1977**Headquarters:** Reynoldsburg, Ohio**Workforce:** Not listed**Number of retail locations:** 1,023

Summary: The largest subsidiary of L Brands, Victoria's Secret is North America's No. 1 specialty retailer of women's intimate apparel, operating approximately 1,000 mostly mall-based Victoria's Secret and Victoria's Secret Pink shops throughout the United States and Canada. Bras, panties, hosiery, swimwear, fragrances and beauty products, are sold under the Victoria's Secret brand and grouped in collections such as Angels and Very Sexy. The chain's youth-oriented PINK brand targets teens and younger women. Victoria's Secret is known for its catalogs and its annual fashion show, the Victoria's Secret Fashion Show.

VICTORIA'S SECRET**Vitamin Shoppe****Date founded:** 1977**Headquarters:** Secaucus, New Jersey**Workforce:** 2,720**Number of retail locations:** 700+

Summary: The Vitamin Shoppe is a leading multi-channel supplier, specialty retailer and contract manufacturer of nutritional products. It carries a comprehensive retail assortment, including vitamins, minerals, supplements, herbs, sports nutrition, homeopathic remedies, food and beverage, pet items and beauty aids. In addition to offering 800 national brand products, the Vitamin Shoppe also exclusively carries products under The Vitamin Shoppe brand-- BodyTech®, True Athlete®, MyTriton®, plnt®, ProBioCare®, Next Step® and Betancourt Nutrition®. In 2017, the Vitamin Shoppe launched



SPARK AUTO DELIVERY™, a convenient and differentiated product subscription service that allows customers to save on their favorite wellness items while receiving them on a flexible, automated shipping schedule.

Verizon Wireless**Date founded:** 2000**Headquarters:** Basking Ridge, New Jersey**Workforce:** 235,000**Number of retail locations:** 1,700

Summary: Verizon Wireless, a subsidiary of Verizon Communications, Inc., offers wireless telecommunications services, devices and solutions via a 4G LTE network throughout the United States. It serves 108.2 million retail connections and operates more than 1,700 retail locations in the United States. It also offers voice and data services in over 200 destinations. In 2017, Verizon announced the return of the unlimited data plan—Verizon Unlimited—with minimal restrictions and an affordable price.

**Wawa****Date founded:** 1963**Headquarters:** Wawa, Pennsylvania**Workforce:** 30,000**Number of retail locations:** 750

Summary: WAWA is chain of more than 750 convenience retail stores (over 500 offering gasoline) located in Pennsylvania, New Jersey, Delaware, Maryland, Virginia and Central Florida. WAWA carries a variety of its own name brands including fresh built-to-order hoagies, soups, coffee and hot breakfast sandwiches. In 2017, WAWA added a new mobile ordering platform to its popular rewards program, enabling customers the convenience of ordering food and beverages through their mobile device, whenever and wherever they want.

**Wayfair****Date founded:** 2002**Headquarters:** Boston, Massachusetts**Workforce:** 7,700+**Number of retail locations:** Online

Summary: Wayfair is one of the world's largest online shopping destinations for the home, offering more than 10 million items including home furnishings, décor, home improvement and house wares. Wayfair represents over 10,000 suppliers across five distinct brands - Wayfair.com, AllModern, Birch Lane, Joss & Main and Perigold. In 2017, Wayfair's "View in Room 3D" app feature was incorporated into their mobile shopping application. It also announced plans to expand its house wares selection.



Wegmans Food Market

Date founded: 1916

Headquarters: Rochester, New York

Workforce: 47,000

Number of retail locations: 92

Summary: Wegmans is a regional family-owned supermarket chain with 92 locations in New York, Pennsylvania, New Jersey, Virginia, Maryland and Massachusetts. The upscale grocer prides itself on quality, fresh produce, and over-the-top customer service, expansive displays, and a variety of store brands. Wegmans also operates restaurants in select locations, including Next Door, Amore, The Pub and The Burger Bar, all of which highlight the company's innovative culinary talent and access to the best ingredients.



Whole Foods Market

Date founded: 1980

Headquarters: Austin, Texas

Workforce: 89,000+

Number of retail locations: 477

Summary: Whole Foods is the world's largest natural foods grocery chain with 477 locations in the U.K., Canada and the United States. Self-proclaimed as "America's Healthiest Grocery Store," Whole Foods maintains standards of quality for natural and organic produce and sustainable agriculture. Its private-label items, 365 Organic Everyday Value and Allegro Coffee lines, offer a variety of non-GMO, vegan and gluten-free foods. Approximately 55 percent of Whole Foods Market's exclusive brand offerings are either certified organic or "Non-GMO Project Verified." In 2017, Amazon acquired Whole Foods for \$13.7 billion dollars, paving the way for lower prices, discounts for Amazon Prime members, and online shopping and delivery options.



Williams-Sonoma, Inc.

WILLIAMS-SONOMA

Date founded: 1956

Headquarters: San Francisco, California

Workforce: 26,800

Number of retail locations: 621

Summary: Williams-Sonoma, Inc., is a specialty retailer of high-quality home products, known for its extensive line of gourmet cookware, specialty foods and appliances. The company represents eight distinct merchandise strategies via its retail chain and ecommerce mix: Williams Sonoma, Pottery Barn, Pottery Barn Kids, West Elm, PBteen, Williams Sonoma Home, Rejuvenation, and Mark and Graham. Williams-Sonoma operates 621 stores in 43 states, Washington, D.C., Puerto Rico, Canada, Australia and the UK. In 2017, Williams-Sonoma, acquired Outward, Inc., a leading 3-D imaging and augmented reality platform for the home furnishings and décor industry in an effort to increase customer engagement.

Zappos

Date founded: 1999

Headquarters: Las Vegas, Nevada

Workforce: 1,500

Number of retail locations: Online only

Summary: Zappos is the number one online store selling an extensive selection of shoes in a variety of brands, styles, colors, sizes and widths, and a growing inventory of apparel, bags, jewelry, watches, ties, eyewear and electronics. Acquired by Amazon, in 2009, Zappos is known for its superior customer service and satisfaction offering shoppers free shipping and 365-day return policy. In addition, the company's rewards program provides points on purchases, early access to sales, and an exclusive customer service number. Zappos is looking towards increased interaction with its customer base by experimenting with pop-up stores.



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