

RSR's Annual Evaluation of Retailers' Website Performance: Lost Revenue Opportunities Continue

Key Findings

80 Brands Ranked from IR 500

This year the focus was on 80 brands whose rank fell between numbers 45 and 200 on the **Internet Retailer Top 500 list**.

1,000+ Consumers Surveyed

Survey of more than 1,000 US-based consumers to get their perspective on how online retailers are doing in terms of site performance.

The Top Performers



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Finding: 76% of Shoppers Don't Start Their Search on a Retailer's Site



I start on Google

50%



I start on Amazon

26%



I start on a brand's website

24%



Introduction

Executive Summary: Fixing The Root Of These Issues For The Long Haul

For the past several years, RSR analysts have evaluated retailers' online digital offerings for site performance and the impact on shopper experience. The evaluations serve as a report card while answering the question, "How are retailers doing?" We believe that this year's report card is more important than ever. Why?

The hope for a return to normalcy has not been fulfilled with the past two years being disruptive, hectic, and completely unpredictable, especially for the world of retail. Not only is there still an on-going global pandemic, but many shoppers will not return to in-store shopping, shipping and delivery efforts are in shambles, and the global supply chain has become completely unhinged. And all just in time for the all-important holiday shopping season.

However, there is hope. As chaotic as the retail landscape has become, there are still vital online shopping elements that brands have total control over, such as their digital shopping journey and site performance. But with that control comes an obligation to consumers. While shoppers will have no choice but to deal with the inventory and shipping issues, there will be zero understanding when it comes to their online shopping experience. Slow sites will not be tolerated.

Retailers need to focus on fixing this root issue, making the online shopping journey as effortless as possible – from site speed to the ease of product discovery, to the checkout process and payment options – all in a perpetually scalable way.

A Description Of This Research

While writing this industry benchmark report, retailers are headed into a holiday season like no other in history. Last year we conducted our research during a global lockdown and encouraged retailers to get their website offerings in order to successfully handle the onslaught of shopping that had moved online when visiting stores was simply not an option. Just a year later, stores are back in the picture, but with a twist. While retailers who have modified their store systems and processes to accommodate digital order fulfillment in a remarkably short

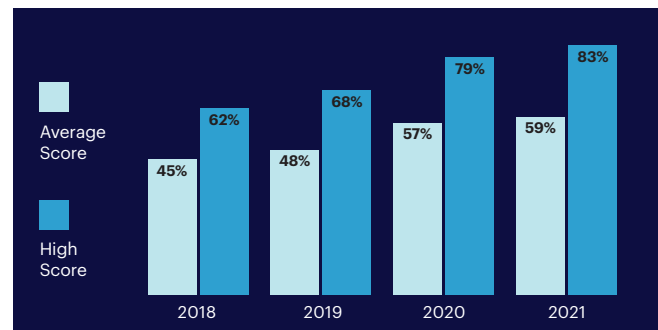
period of time deserve kudos, consumers' behaviors have changed. The COVID-19 pandemic forced even the staunchest of old-school-store shoppers to incorporate digital assets into their shopping journeys, and the results are in: they're never going back.

While certain criteria remain from previous years' research to mark progress (product detail page load time, for example), others are entirely brand new for this year's evaluation (for example, the ability to shop a retailer's offerings on Facebook). Also new this year is the addition of data from the [Site Speed Standard](#), an industry benchmark that measures the experience impact of site speed and performance, drawing on the shopping activity of more than 25 billion page views across 200 leading retailers.

Fast site speed is critical to growing online revenue. Improving page load time by just 1 second results in a 5.7% conversion lift on mobile and a 3.3 conversion lift on desktop.



The good news? Some brands are getting it right. Many are making some slow progress. The bad? They're not doing it quickly enough to keep up with consumer expectations and some brands are way behind in this regard. The brands that have moved to the top-ranking slots in this report are prioritizing their digital performance in a way we haven't seen in the past. They are taking a vastly different approach and have made it clear that this is a main focus for them.



Read on for the full results and analysis →

And The Top Performers Are...

Based on criteria (Appendix B) where a full range of 0-3 points was available across 22 different categories, the following retailers took top honors (all scores are out of 65 possible points):



And The Fastest Sites Are...



First: A Look From The Consumer's Point Of View

Rolling The Dice On The Shopper's Journey

It's not enough to declare that it's important for retailers to take the performance of their digital offering seriously. To validate that opinion, we needed to understand what consumers' shopping journeys look like **right now** as we head into Holiday 2021. To get a sense of that, we needed to know from our

consumers *where* they are starting their online shopping journeys. As you can see from Figure 1, it is nowhere within the retailers' four "walls".

From this survey, we learned that 76% of shoppers are not starting on the brand's site.

FIGURE 1

76% of shoppers are NOT starting with a brand's site

Where do you begin your online search for a desired product?



Source: RSR Research, November 2021

So, what does this mean for brands?

The 76% of shoppers that are ending up on a retailer's site through other channels like Google are going to land on either a Product Detail Page (PDP) or a Category Page when they get to the site – NOT a retailer's Homepage. This means that brands must focus on optimizing these pages for speed and performance. According to the breakdown, most consumers start their journey with Google, which is great considering many brands spend money on Google Ads. However, Google rankings heavily factor in site performance and speed, so if a site's speed isn't up to par, then this statistic is not in retailers' favor.

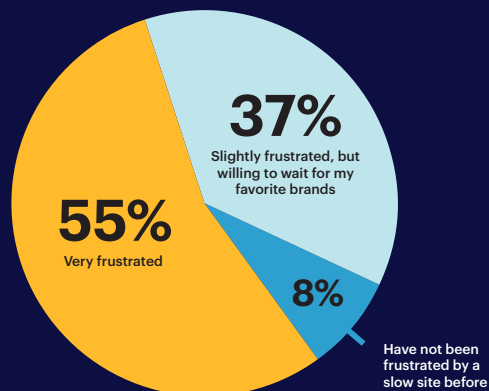
It doesn't fare well for brands either that 26% of shoppers start on Amazon. While consumers could possibly click on an Amazon ad for the retail brand, it's really a roll of the dice on whether they will ever land on that site through this channel. There is still a chance they will buy from a competitor.

Much of what happens is already out of a retailer's control, so the need to maximize opportunities that arise once a shopper is on site only becomes that much more important. As a result, the next thing we wanted to know is how much site speed matters to consumers. As seen in Figure 2, it matters quite a bit:

FIGURE 2

92% of shoppers are frustrated with slow sites

How frustrated do you get when you go shopping online and the site is slow?



Source: RSR Research, November 2021

This triggers a follow-on question: “What happens in the wake of this frustration? Is it enough to cause a buyer to take their business elsewhere?” The answer: a resounding yes.

Considering these data points (and those presented in the ensuing pages), we feel confident in our advice that retailers improve shopper experience, and site speed immediately. Let us now look at some of the more encouraging trends that resulted from our evaluation of retailers.

FIGURE 3

87% of shoppers will not wait for a slow site to load

Have you ever left a website because it does not load in the time you expect it to?

87%



Yes

13%



No

Source: RSR Research, November 2021

The Good News

Retailers Are Taking Control of Site Performance

When we first began conducting this evaluation back in 2017, we were shocked at how poorly most eCommerce sites performed. At that time, the average grade was 69%. One of the most glaringly apparent outcomes of that first report was that retailers were not shopping their own sites. Slow loading pages, broken links, and checkout processes that were unable to be completed abounded – even among well-respected brands ranking highly on the Internet Retailer 100 list.

How the world has changed. And while consumers have grown more demanding, so too, has retailers’ willingness to address the most obvious setbacks to their online shopping experience. Some retailers have even found creative workarounds to annoying popups – once the bane of online shopping. **Casper Sleep Inc** is a great example of a way of handling these necessary evils, but in full disclosure, too many other brands (**Dillards, Forever21**) have yet to make advancements here.

All in all, we were impressed with the overall load times, PDP load times, and checkout experiences. We had far fewer incidents this year that would have caused us to abandon a cart than in years past. In fact, each of the seven brands that stand on the podium this year scored higher than our first-place winner did just a few years back. That’s real progress. Retailers’ digital offerings are getting better. And not a moment too soon, as our consumer respondents are so quick to remind us (Figure 4).

PDP and Category Pages make up 69.6% of the buyer’s journey.

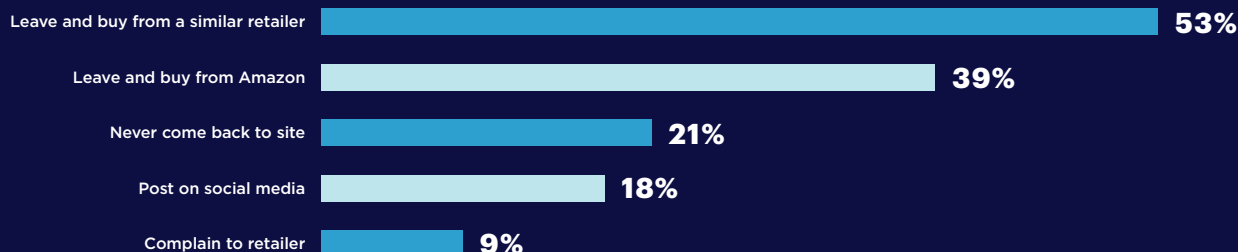
When optimized, PDPs load 34% faster - saving 2 full seconds of page load time on desktop, and 1.8 seconds faster, or 32% on mobile.



FIGURE 4

Retailers’ slow sites are making their competitor’s day

What do you do when you are frustrated with a slow site? (Please select ALL that apply)



Source: RSR Research, November 2021

Overall, more than a quarter of shoppers become so annoyed with a slow site that they commit to taking some sort of action in the form of a complaint, whether that's directly to the retailer, or to the entire world. 18% of shoppers are opting to publicly defame brands on social media due to a poor shopping experience.

The biggest blow? Continuing to keep a slow site is making the competition's day. Why? 53% of shoppers are going to a competing site because the one they were on was too slow.

Shoppers want a load time of under 4 seconds



How slow is too slow? As noted in the Site Speed Standard, sessions that beat four seconds capture 59% of conversions, while sessions that trail four seconds deliver a near-identical 58% of bounces.

The fact that consumers so quickly abandon retailers when they are dissatisfied only strengthens the need for

retailers to self-examine, identify, and control any issues that invariably exist within their online experience, and heal their root problems permanently. This is no time to wait and see.

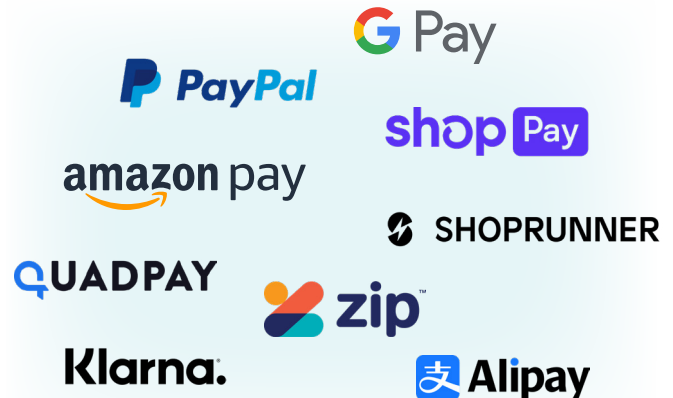
More Retailers Are Paying Attention To Site Design – Both On Mobile AND Desktop

Despite nearly two years of constant disruption, most of the retailers we evaluated this year have clearly made a commitment to taking control of their digital offerings and making them more shoppable.

In the past, it was obvious when a retailer had upgraded its mobile site, only to leave the desktop experience behind. We found far less of this this year – and were quite surprised at how conscientious many brands have become about improving not only site speed and ease of navigation, but brand identity throughout the online shopping experience.

Ralph Lauren's website is an excellent example of this, featuring video content that is completely on-brand in both look and feel throughout. And while they were one of the few retailers to score maximum points in this category, attention to design need not be limited to up-market brands. **Duluth Trading Company** – hardly what comes to mind when one thinks of luxury – did an excellent job here, too. Both their desktop AND mobile sites feature distinctive cartoon-style artwork, and the overall look and feel provides the shopper with a sense that this is not like any other retailers around. Several others scored big points here, as well (**Neiman Marcus, KEH, Weber Grills**).

That said, the brands that disappointed us here (**The Children's Place, Calvin Klein**) were surprisingly outdated. Much work remains to be done.



Payment Options Have Drastically Improved

A discussion about shoppers' evolving financial decisions is well outside of the scope of this research, but suffice it to say: people want new ways to pay for the things they want to buy during these strange times. Thankfully, many more retailers are heeding that call in 2021 than they were even just last year.

Many fashion retailers (**Abercrombie & Fitch, American Eagle, Under Armour**) have embraced third party solutions like Shoprunner, Klarna, and Afterpay, enabling shoppers to buy the styles they want the moment the impulse hits them regardless of whatever their current financial situation may be. **Chicos** goes so far as to accept AmazonPay on its site – something only a handful of retailers have thus far elected to do (whether or not Amazon is friend, foe, or some frenemy combination of the two remains to be seen in this regard). **Fashion Nova** wins the award for most payment options, allowing for such additional forms as ShopPay, GooglePay, QuadPay, and Zip, while **Estee Lauder** is the only retailer in our evaluation willing to accept Alipay.

What is genuinely surprising is the number of brands that are behind the curve here. **CVS** and **Lamps Plus** only accept PayPal (beyond standard credit card options), while several retailers who offer would-be-popular-gifts (**Beachbody**) don't even provide an opportunity to purchase a gift card. Worse yet, several luxury retailers seem to be genuinely averse to any type of flexibility: **Tiffany.com** accepts no form of payment beyond that of a typical credit card. This is a clear miss.

Stranger still, some sites (**goop.com**) accept completely different forms of payment on mobile devices than they do on desktop. Still, all in all, we were happy to see so many brands embracing the future with alternative payment options this year.

And now it is time to examine the truly bad news resulting from our research this year.

The Bad News

Too Many Retailers Aren't Addressing Poor Shopper Experience

Of the 80 retailers we looked at, 56 still receive a failing grade. Despite our best efforts to empathize with how volatile the retail market really is, this is simply not acceptable.

Forever 21 should not be failing our evaluation. Neither should **Peloton**, or **Talbots**... the list goes on and on. In many cases, retailers' biggest shortcomings were exposed during the checkout process, with too many pages to complete, shopping carts that were hard to find/keep full, or by cluttering matters up with too many suggested add-ons along the way. In too many instances, "old-school" problems like popups and slow load times caused frustration; consumers are too far along in their march towards progress to accept such issues. And at the tail end of this, too many top retailers still provide an online shopping experience that looks and feels much as it did 10 years ago. Retailers still need to up both their content and the overall shopper experience.

It's important to note that this criticism goes for all levels of retail; but retailers don't need to be a luxury brand to accomplish high-end performance. In fact, luxury retailers should take a lead from Columbia Sportswear, who offer engaging video content on their site.

Social Media Is Too Often Being Ignored As A Viable Selling Tool

As we've already noted, past iterations of this report have been harsh on the mobile experience. In the early days of our research, it was visibly neglected. In the ensuing years, it far too often received a makeover, while the desktop experience languished or was inconsistent with the mobile. This year, we found parity – and parity in high levels of excellence – in places we hadn't before. Now the honors of neglected "channel" fall to social touchpoints.

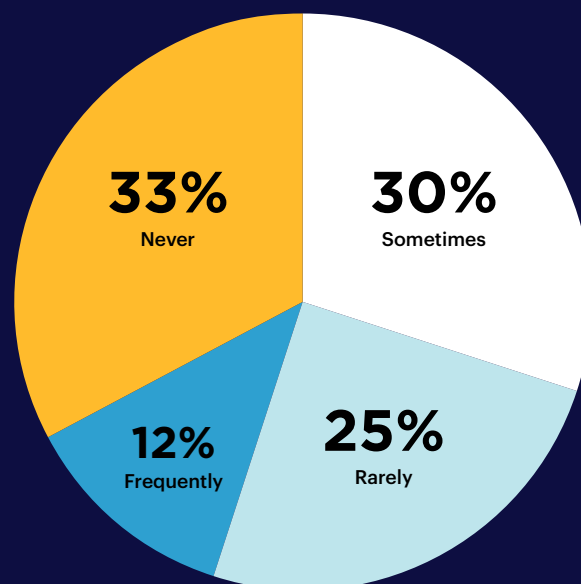
We don't need to harp on this point – consumers are making the case for themselves. While we've never asked shoppers about their willingness to purchase *directly* via social media until now (Figure 5), the fact that less than a third have ruled it out came as a total surprise. This number will only dwindle in the future.

Retailers that ignore social media "channels" as direct sales opportunities do so at their own peril.

FIGURE 5

67% of consumers shop through social

How frequently do you purchase something directly from a social media page? (Instagram, FB, Pinterest)



Source: RSR Research, November 2021

Time Is Not On Retailers' Side

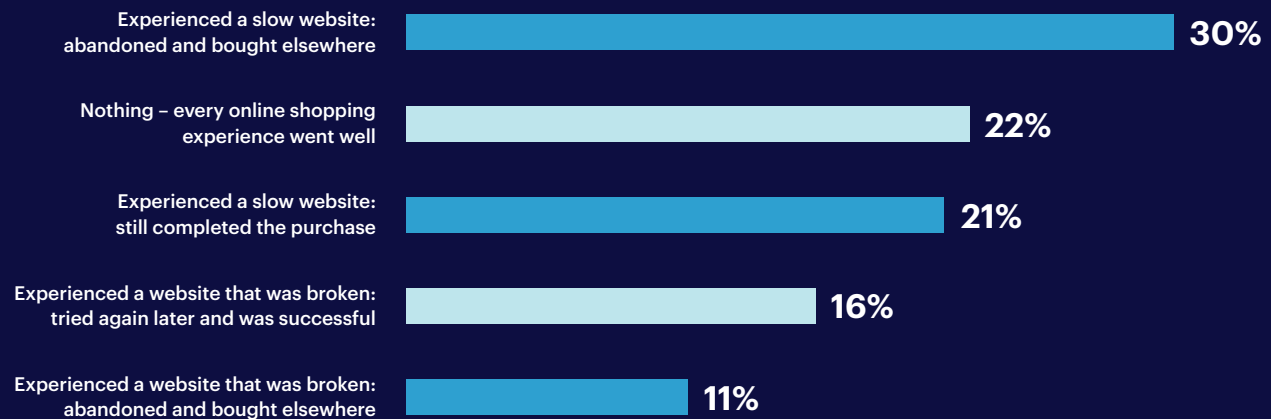
Lastly, if this research shows us anything, it is that we need not underestimate the importance of “getting it right” when a shopper finds themselves on a retailer’s site.

As we can see in Figure 6, shoppers were clearly willing to abandon a retailer during last year’s holiday shopping in the face of a slow or ill-performing site. Their tolerance will likely only wane in the months and years to come.

FIGURE 6

88% of consumers had issues shopping this year

What was the worst online shopping experience you had in the past 12 months (including the holidays of 2020)?



Source: RSR Research, November 2021

Conclusion

As we have addressed in this report, there are some things that are out of brands’ control – volatility of the market, inventory issues, delivery disconnects, supply chain challenges – and there are things that retailers have full control over – like site performance and digital experience.

Speeding up your site and improving shopper experience will keep your brand in the game. However, it’s not enough to take a quick-fix approach in solving these problems. We don’t know

what uncontrollable challenges will pop up next. But by focusing on a long-term, scalable solution, retailers can take back control in an unpredictable environment.

Brands have a small window in which to set their digital offerings on a better course. We are pulling for them to do just that. We look forward to seeing marked improvement when we conduct this research again in time for the holidays in 2022.

Appendix A: Overall Ranking

Retailer	Rank	Total Score (65 Points Possible)
J. Crew Group	1	54
Ascena Retail Group (LOFT)	2 (T)	50
Lands' End	2 (T)	50
Fashion Nova	2 (T)	50
Express	2 (T)	50
Ralph Lauren	3 (T)	49
1-800 Contacts	3 (T)	49
Dillard's	4	47
Pharmapacks, LLC.	5	46.5
Caleres Inc	6 (T)	46
Lamps Plus Inc.	6 (T)	46
Purple Inc	6 (T)	46
Carter's Retail, Inc.	7 (T)	45
Northern Tool + Equipment	7 (T)	45
Aritzia	8 (T)	44.5
Joma Shop	8 (T)	44.5
Build.com, Inc.	9 (T)	44
Backcountry.com	9 (T)	44
Brownells, Inc.	9 (T)	44
American Eagle Outfitters, Inc	10 (T)	43
Tory Burch LLC	10 (T)	43
Groupon, Inc.	11	42.5
Belk, Inc	12 (T)	42
Genesco Inc.	12 (T)	42
Goop	12 (T)	42
Blue Nile	12 (T)	42
TJX Companies	13 (T)	41
PVH	13 (T)	41
Eddie Bauer	13 (T)	41
Bose Corporation	13 (T)	41
MidwayUSA, Inc.	13 (T)	41
Abercrombie & Fitch	14 (T)	40
L.L.Bean	14 (T)	40
FULLBEAUTY Brands	14 (T)	40
Lulus.Com	14 (T)	40
Talbots	14 (T)	40
Revolve Clothing	14 (T)	40
Forever 21, Inc	14 (T)	40
Fast Growing Trees	14 (T)	40
Gardener's Supply Company	14 (T)	40
ULTA Beauty	14 (T)	40

Retailer	Rank	Total Score (65 Points Possible)
KEH, Inc.	15 (T)	39.5
REI	15 (T)	39.5
Tapestry	16	39
Chico's FAS, Inc.	17 (T)	38.5
Yeti	17 (T)	38.5
Tractor Supply Company	18 (T)	38
OpticsPlanet	18 (T)	38
BuildDirect	19	37.5
The Children's Place	20 (T)	37
HP	20 (T)	37
AmeriMark Direct	20 (T)	37
Columbia Sportswear Company	21	36.5
Under Armour	22 (T)	36
Decker Brands	22 (T)	36
Casper Sleep Inc	22 (T)	36
BJ's	23 (T)	35
Peloton Interactive	23 (T)	35
Neiman Marcus	24 (T)	34.5
CVS Caremark Corporation	24 (T)	34.5
Richline Group	24 (T)	34.5
Weber-Stephen Products LLC	25 (T)	34
Tiffany & Co	25 (T)	34
Sears	26	33.5
VIPOutlet	27 (T)	33
Signet Jewelers	27 (T)	33
Army & Air Force Exchange Service	28	32
VMInnovations	29 (T)	31.5
Academy Sports + Outdoors	29 (T)	31.5
Microsoft Corporation	30	31
Galderma	31	30
Vizio, Inc.	32 (T)	28
Floor & Decor Holdings, Inc	32 (T)	28
Tempur Sealy International	32 (T)	28
Bluestem Brands	32 (T)	28
Beachbody, LLC.	33	27.5
Duluth Trading Company	34	26.5
Menard Inc.	35	26
1Sale	36	21.5
The Estee Lauder Companies Inc.	37 (T)	21
Soriana	37 (T)	21

Appendix B: Methodology, Criteria, and Ratings

Methodology

As in prior years, RSR began with a list of roughly 80 retailers, all with a strong eCommerce presence. This year we focused on brands whose rank fell between numbers 45 and 200 on the **Internet Retailer Top 500** list. As in years past, we eliminated all retailers that offer subscription services, as well as those selling auto parts. Each retailer falls squarely into a standardized retail category (such as Apparel/ Accessories, Sporting Goods, Health & Beauty, etc.). The list of brands that we evaluated is found in Appendix A.

As usual, we evaluated these brands' website performance across multiple criteria (listed in Appendix B). Most of the criteria reoccur to enable year-over-year analysis, (*speed of site-load, does site performance impair shopping experience?*), but this research is evolving, and this year includes multiple new tests, including earnable points for *site personalization* and an *engaging checkout process*.

We also surveyed more than 1,000 US-based consumers ages 18 and up, to get their perspective on how online retailers are doing in terms of site performance. This data appears throughout the report and provides first-hand context for what shoppers deem most important, as well as their behaviors for when things go awry.

The evaluation took place in the summer and early fall of 2021. An overview of the results for every retailer and category is also included in Appendix A.

Retailer Scoring: Criteria

Our scoring scale is comprised of 65 maximum possible total points allocated based on detailed criteria. Below is a sample of some of the criteria for infrastructure, shopper experience (comparing both mobile and desktop), and checkout processes.

Infrastructure	
Time to first byte - PDP	3 - Under 100ms 2 - 100-600ms 1 - 601-1000ms 0 - Over 1000ms
White page time / time to start render - Home Page	3 - less than 2s 2 - 2 to 3.4s 1 - 3.5 to 5s 0 - greater than 5s
Last Byte - PDP	3 - less than 500 ms 2 - less than 1.25 s 1 - Less than 1.5 s 0 - greater than 1.5 s
Core Web Vitals	
Largest Contentful Paint (LCP)	3 - 2.5 seconds or less 2 - 2.5 - 3.0 seconds 1 - 3.0 - 4.0 0 - greater than 4 seconds
Cumulative Layout Shift (CLS)	3 - Under 0.1 2 - 0.1 - 0.17 1 - 0.18 - 0.25 0 - greater than 0.25

Page Load Times	
Time to document complete	3 - Under 3 seconds 2 - 3-5 seconds 1 - 5-10 seconds 0 - More than 10 seconds
Delta between fastest and slowest load times	3 - less then 500 ms variation 2 - 500ms - 2 seconds 1- 2 seconds - 3 seconds 0- more than 3 second variation
SPA	2 - Yes 0 - No 1 - Partial 0 - Unknown
3rd Party Performance Impact	
Number of 3rd parties on Home Page	3 - More than 60 2 - 45-60 1 - 21-44 0 - 20 or less
Percent of load time from 3rd parties	3 - 50-85% 2 - 40% to 49% OR 86% to 100% 1 - 20% to 39% 0 - less than 20% OR greater than 85%"
Number of 3rd parties on Product Detail Page	3 - More than 60 2 - 45-60 1 - 21-44 0 - 20 or less
Avg time on site	3 - 5:01 or greater 2 - 4:01-5:00 1 - 3:01-4:00 0 - 3:00 or less
Shopper Experience	
Image use: Cool/cutting edge options	3 - Above the norm 2 - Average 1 - Below average 0 - Severely lacking
Did site performance impair your experience navigating the site?	3 - No impact 2 - Slightly noticeable impact 1 - Annoying interference with shopping journey 0 - So annoying I would not have shopped this site
How many different types of third parties are available on the site? Categories include Live chat, recommendations, personalization, ratings & reviews, social embeds, localization, commerce search, a/b testing, ad tech, analytics, customer service, marketing tech	3 - 11 or more categories 2 - 9-10 categories 1 - 7-8 categories 0 - 6 or fewer
Do they have good social media shopping and checkout? (Facebook, instagram, pintrest). Are we rewarding them for staying within social site?	3 - can checkout within all three 2 - 2 1 - 1 0 - no check out experience on social

Did you physically see a jump/shift/ stutter while you were shopping?	3 - No 2 - Once 1 - Twice 0 - Yes, many times
Is it a great mobile shopping experience? - Is it easy to navigate? - Responsive design when phone turned sideways? - Is it modern? Tiles? Sideways? - is it focused? - catalog return experience - Is it easy to add stuff to your cart?	3 - Better than DT site 2 - Identical 1 - Worse than DT site 0 - No mobile site
Checkout Process	
“Memory/Personalization (Brand new browser established before first visit. Items shopped, one placed in basket. Checkout nearly completed. Cookies not cleared. Identical browser used for 2nd visit)”	3 - Effort made to save abandoned cart at exit/via email 2 - Abandoned cart restored upon return visit 1 - Product suggestions upon return based on previous visit 0 - No recall of any kind
Checkout Process	3 - Paypal + Other wallet + Discount + CC 2 - Paypal + Discount + CC 1 - Paypal + CC 0 - Just credit card
Number of services running on checkout form	3 - 5 or less 2 - 6-10 1 - 11-19 0 - 20 or more
Ease of checkout process	3 - Easier/faster 2 - Same as DT checkout 1 - Annoying interference with shopping journey 0 - I would not have shopped this site

Appendix C: About Our Sponsor

YOTTA

Leading brands such as Ann, Inc., Carter’s, J. Crew, Lands’ End, Mattress Firm, Nutrisystem, Ralph Lauren, and Samsonite rely on Yottaa to accelerate, optimize, and secure their eCommerce sites. By optimizing the loading of 3rd party eCommerce technologies, high resolution images, and other website elements, Yottaa enables online brands to deliver superior customer experiences, improve web performance up to 60%, and increase online conversion up to 20%. By controlling the execution of all 3rd parties and other services on their sites, Yottaa enables brands to enhance their overall security posture, provide more secure customer experiences, and ensure compliance with internal and external policies. To learn more about how Yottaa can optimize every page load on your eCommerce site, please visit www.yottaa.com or follow @yottaa on Twitter.

Appendix D: About RSR Research



Retail Systems Research (“RSR”) is the only research company run by retailers for the retail industry. RSR provides insight into business and technology challenges facing the extended retail industry, providing thought leadership and advice on navigating these challenges for specific companies and the industry at large. We do this by:

- **Identifying information** that helps retailers and their trading partners to build more efficient and profitable businesses;
- **Identifying industry issues** that solutions providers must address to be relevant in the extended retail industry;
- **Providing insight and analysis** about a broad spectrum of issues and trends in the Extended Retail Industry.