



**2022 STATE OF**

# **In-Store Experience**



## A word from our CEO

Consumer preferences over when and how to shop are always changing, and retailers need to be aware of these evolving behaviors in order to keep customers happy, returning, and spending. But the past few years have been challenging for brick-and-mortar locations. The pandemic forced employers to drastically change how they do business, supply chain issues have made products on the shelves scarce, employees seeking new opportunities have left retailers short-staffed, and the economy has threatened to undercut consumer spending.

In their search for cheaper, more available products, have customers given up on physical stores and moved all of their shopping online? Have we finally seen the death of brick-and-mortar?

Not at all. As we learned from our findings in the “State of the In-Store Experience” in 2021, while there are many customers shopping online, there are also many still frequenting physical locations. The biggest factor drawing them in? The in-store experience. Seeing and trying products, interacting with helpful store employees, using technology to experience a streamlined visit – these are all things that consumers can’t get online.

For 2022, we wanted to investigate whether customers are still following the same patterns, or if their behaviors and preferences have shifted yet again. We hope our findings provide you with insights and actionable opportunities to improve your in-store experiences in 2022 and beyond.



**Bobby Marhamat**

CEO | RAYDIANT

# Key Findings

Here are seven insights we uncovered about the in-store customer experience.

## 1 Consumers are split on shopping in-store or online.

51% would prefer to shop at a physical store, and do so because they like to see and touch products before they buy them. 49% would prefer to shop online, and do so because they can shop anytime and anywhere.

## 2 81% say that the in-store experience is either important or very important to them.

Additionally, 86% state that a positive in-store experience will prompt them to return to the store again.

## 3 59% are likely to spend more when they have a positive in-store experience.

These same individuals say that a positive in-store experience will lead them to make a website purchase from that brand, too.

## 4 88% will tell others about a bad experience.

After a negative in-store experience, 88% are very likely or somewhat likely to tell others about it. 46% have stopped shopping with a brand because of a bad in-store experience.

## 5 Product selection and variety are the number one factors that contribute to a great in-store experience.

Respondents also say that the quality of service from the staff and the location, layout, and organization of products create a positive in-store experience as well.

## 6 Exclusive in-person discounts are the number one thing businesses can do to attract customers to their physical location.

Businesses can also offer experiences that make visiting in-person more fun, and provide exclusive products unavailable online to attract customers to their brick-and-mortar stores.

## 7 Those polled state that news of a recession has no impact on their holiday shopping plans.

40% report they don't plan to change their spending habits for Black Friday and/or Cyber Monday, and 35% state that they don't plan to change their spending habits for the holiday season in general.

# Table of Contents

**P1**

**Shopping Habits and Preferences**

**P2**

**The Impact of Positive (and Negative) In-Store Experiences**

**P3**

**Purchasing Habits**

**P4**

**Creating and Delivering a Memorable In-Store Experience**

**P5**

**Black Friday and Cyber Monday Plans**

## Methodology

On August 8, 2022, we surveyed 1000 American consumers. The survey was conducted online via Pollfish using organic sampling through Random Device Engagement (RDE). To access the raw data, [click here](#). Learn more about the Pollfish methodology [here](#).

# **PART 1**

## **Shopping Habits and Preferences**

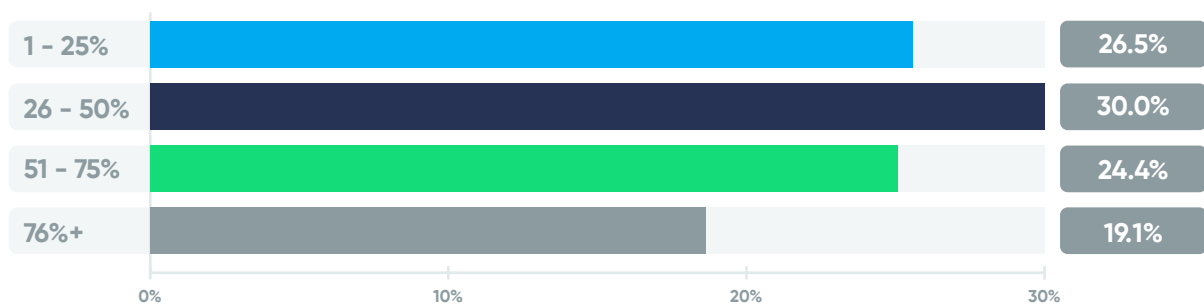


Consumer shopping behaviors are always changing, and in the past few years, we've seen a massive shift in attitudes regarding online and in-person shopping, specifically in reaction to changing pandemic requirements. In 2022, how do customers like to shop, and why?

### 44% have spent half or more of their shopping budget in a physical store

Overall, 43.5% of respondents have spent half or more of their shopping budget in physical stores, showing that consumers are splitting their purchases between online and physical locations.

26.5% have spent between none and one quarter of their budget at a physical location. 30.0% have spent between one quarter and one half of their budget at a physical location. 24.4% have spent between half and three-quarters of their budget at a physical location. 19.1% have spent between three-quarters and all of their budget at a physical location.



### 51% would prefer to shop at a physical store while 49% would prefer to shop online

When asked their preference of how they would prefer to shop, 50.6% would shop at a physical store while 49.4% would prefer to shop online. This is a slight shift towards physical locations over last year, where 48.2% preferred shopping in a physical location and 51.8% preferred online.

Of course, it's probably not surprising that the younger the respondent, the more likely they are to shop online than in-person. Of respondents aged 18 through 24, 56.6% prefer to shop online and 43.4% prefer at a physical store. For those aged 25 through 44, 55% prefer online and 45% prefer physical stores. Between ages 45 through 54, 43.5% prefer online and 56.5% prefer physical stores. Finally, in ages 54 and over, 31.3% prefer online and 68.7% prefer physical stores.

Generally speaking, if you have the choice today, how do you prefer to shop?







## Top Five Reasons to Shop in a Physical Location

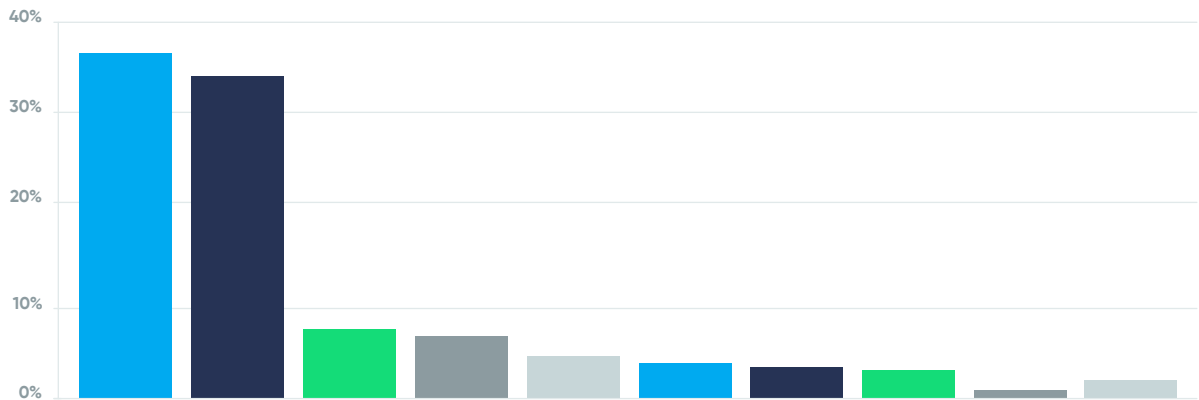
Those who stated that they preferred to shop at a physical store explained why:



Other reasons include being less likely to be scammed or defrauded (3.7%), because they find better deals that aren't online (2.7%), because returns are easier than online (2.3%), because they have no other option for getting what they need (0.6%), and other findings (1.2%).



### What's the primary reason you prefer to shop at a physical location?



● Because I like to see and touch products before I buy them	37.7%
● Because I enjoy the experience of shopping in person/visiting physical locations	33.0%
● Because I can avoid high shipping costs	8.4%
● Because I don't want to wait for delivery	6.3%
● Because I can buy local products I can't find online	4.1%
● Because I am less likely to be scammed/defrauded	3.7%
● Because I find better deals that aren't online	2.7%
● Because returns are easier than online	2.3%
● Because I have no other option for getting what I need	0.6%
● Other	1.2%

### Top Five Reasons to Shop Online

For those who prefer to shop online, their reasons include:

**23.1%** **Because I can shop anytime and anywhere**  
The biggest appeal to shopping online is because online retailers never close and are always accessible, allowing for near-total flexibility during the shopping experience.

**18.6%** **Because I do not need to go anywhere or leave home**  
Respondents also like being able to shop without going out – whether they prefer to, or have to stay put.





**17.8%**

**Because it's easier to access discount codes, tools, or apps**  
Shopping online offers added ease because of technology, including the ability to shop through apps, prolific discount codes, and more.

**14.4%**

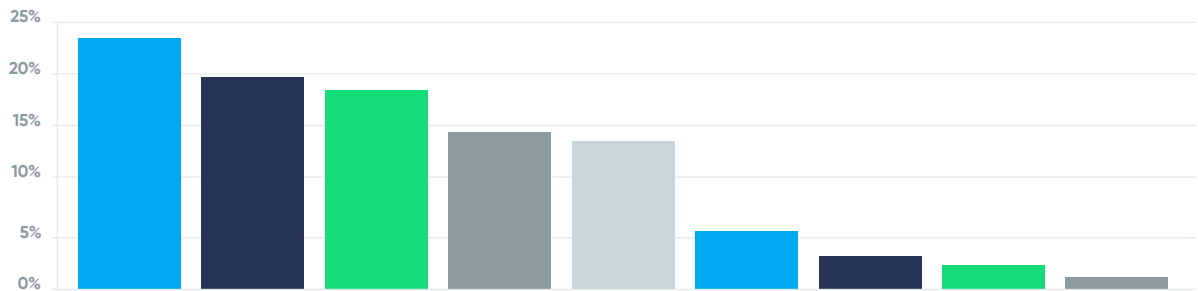
**Because it's easier to compare prices**  
Respondents say it's easier to compare prices across websites rather than across stores.

**13.4%**

**Because it's faster**  
Despite the need for shipping, respondents still see shopping online as a faster alternative.

Other reasons include a larger variety online (5.5%), because they have health and safety concerns related to COVID (3.9%), because they find products unavailable locally (2.2%), and "other" (1.2%).

**What's the primary reason you prefer to shop online?**



● Because I can shop anytime/anywhere	23.1%
● Because I do not need to go anywhere/leave home	18.6%
● Because It's easier to access discount codes and tools/apps	17.8%
● Because it's easier to compare prices	14.4%
● Because It's faster	13.4%
● Because there is a larger variety	5.5%
● Because I have health and safety concerns related to COVID	3.9%
● Because I find products unavailable locally	2.2%
● Other	1.2%



## Summary

The death of brick-and-mortar still hasn't materialized, even after two years of off-and-on closures and operational adjustments due to the pandemic. Consumers are still frequenting physical locations, and above all, spending money. 44% have spent half or more of their current shopping budget in a physical store, and 51% would prefer to shop at a physical store as well. Why do they enjoy shopping in a physical location? The ability to see and touch products before purchasing them, the immediacy of being able to take a purchase home that day, and the overall experience of being out-and-about in a store.

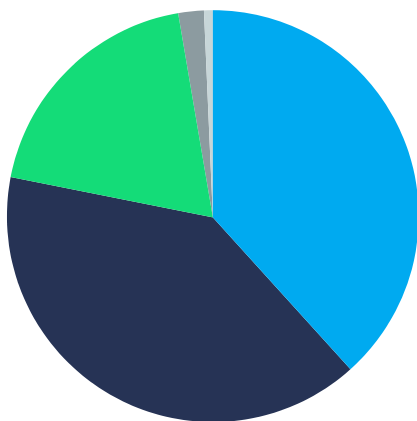
## **PART 2**

# **The Impact of Positive (and Negative) In-Store Experiences**

Is a shopping experience simply about finding the product, paying, and heading home? Or is there something more that customers are looking for when it comes to the in-store experience? From helpful wayfinding, to excellent customer service, to fast and efficient checkout, customers are looking for an experience that will pull them into a physical location. Are they finding it?

## 81% say the in-store experience is either very important or important to them

Retailers can't ignore the impact of experience, as 37.5% say that the in-store customer experience is very important to them, while 43.5% say it's important. 16.5% are neutral about the importance of the in-store experience. Only 1.9% say it's unimportant, and 0.60% say it's very unimportant.

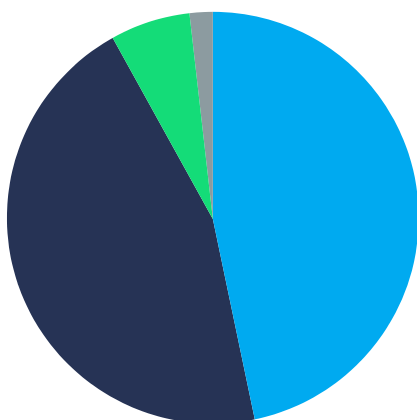


Today, how important is the in-store customer experience for you when visiting a physical store?

Very important	37.5%
Important	43.5%
Neutral	16.5%
Unimportant	1.9%
Very unimportant	0.60%

## 46% have stopped shopping with a brand because of a bad in-store experience

The in-store experience can impact a customer's perception of a brand. Can one poor in-store experience break that relationship? Yes, as 46.4% say that they have stopped making purchases with a company because of a bad in-store experience. However, 44.9% say they have not stopped frequenting a brand because of a bad in-store experience.



Have you ever stopped buying from a company for good because of a bad in-store customer experience?

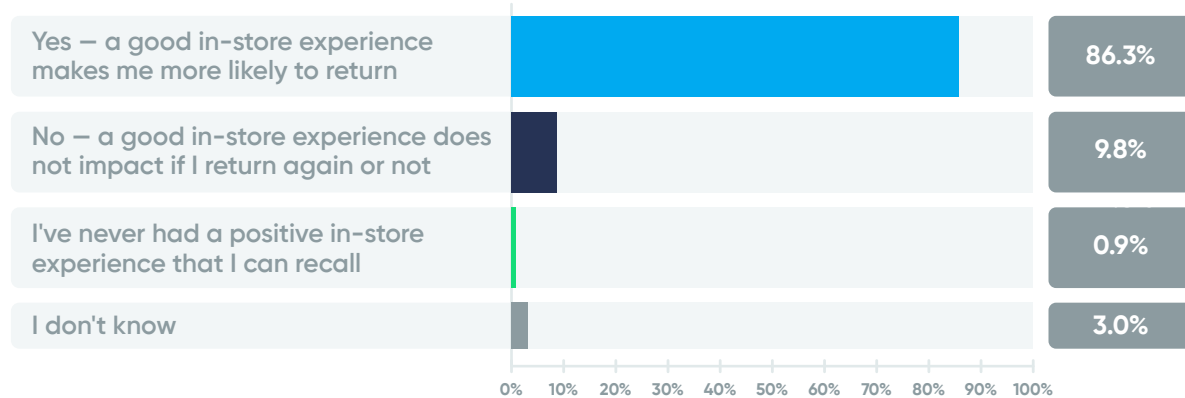
Yes	46.4%
No	44.9%
I don't know	7.7%
Other	1.0%



## 86% say a positive in-store experience will get them to return

86.3% say that yes, a good in-store experience makes them more likely to return to that business, meaning that great experiences build trust in and affinity to the brand. Only 9.8% stated that the in-store experience doesn't impact if they return again or not.

When you have a positive in-store customer experience, are you more likely to return again?

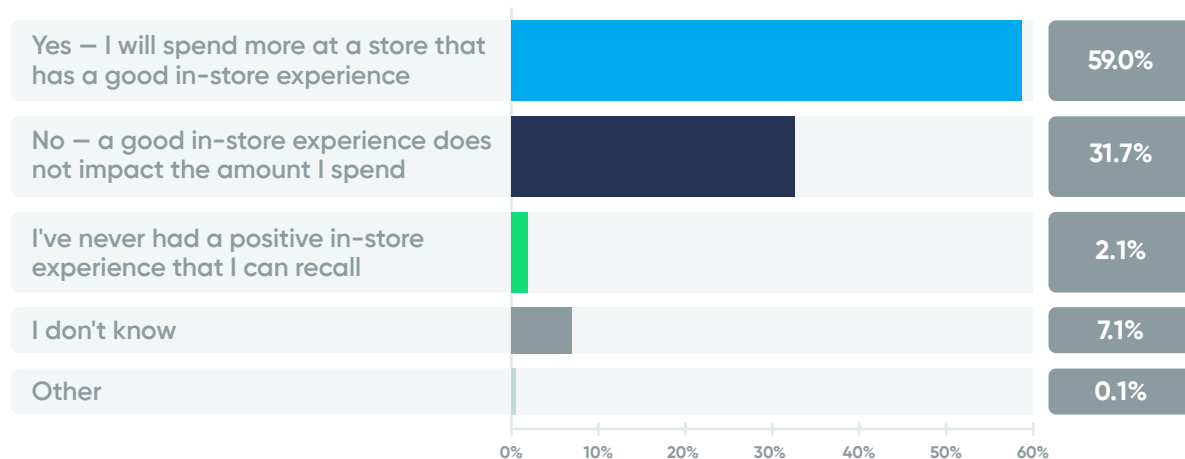


## 59% say they're likely to spend more when they have a positive in-store experience

Does a positive in-store experience translate into a customer wanting to spend more in the store? It does, as 59% say they will spend more at a store in which they have a good in-store experience. However, 31.7% say that a positive in-store experience doesn't necessarily impact how much they'll spend.

This percentage changes with age group as well, as younger respondents are more likely to spend their dollars after a great in-store experience. 68.3% of respondents ages 18 through 24 say they're likely to spend more, while 61.1% of respondents ages 25 through 44 will. 56.5% of respondents ages 45 through 54 say they're likely to spend more, while only 46.6% of respondents ages 54 and older will.

When you have a positive in-store customer experience, are you more likely to spend more at that visit?



## 59% say a positive in-store experience will lead them to make a website purchase

There is also a correlation between having a positive in-store experience with a brand and making purchases from that brand online. 58.8% say that a good in-store experience will make them more likely to purchase from the brand’s website – again demonstrating the correlation between a good experience and brand affinity. However, 28.9% say that their in-store experience doesn’t impact whether they purchase from that brand online or not.

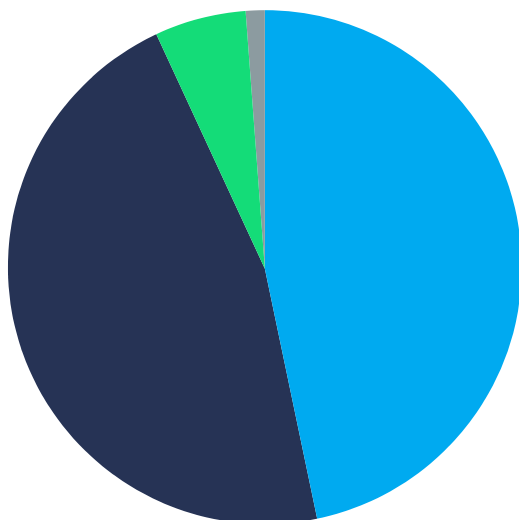
Like above, younger respondents are more likely to purchase from brands online after a positive in-store experience, while older respondents are not more likely.

When you have a positive in-store customer experience, are you more likely to purchase from that brand online?



## After a positive in-store experience, 91% are very likely or somewhat likely to tell others about it

Word of mouth is the best marketing a brand can get. When they have a positive in-store experience, 46.5% say they are very likely to tell others about it, and 44.5% say they’re somewhat likely to. Only 8.4% say they’re not very likely to, and 0.60% replied “other.”

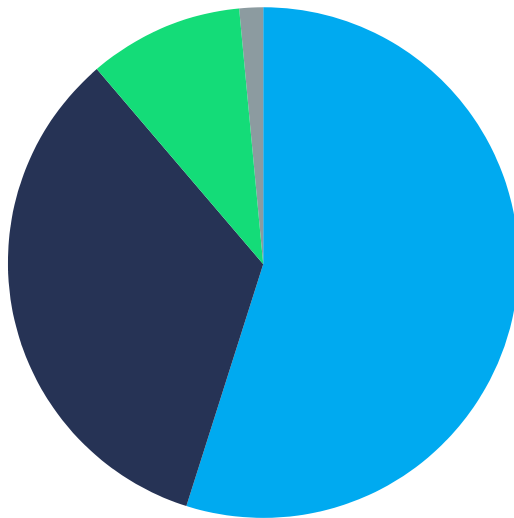


If you have a positive in-store customer experience, how likely are you to tell others about it?



## After a negative in-store experience, 88% are very likely or somewhat likely to tell others about it

On the other hand, word of mouth can be the worst marketing a brand can get, too. When customers have a negative in-store experience, 54.3% say they are very likely to tell others about it, and 33.6% say they're somewhat likely to. Only 11.4% say they're not very likely to, and 0.70% replied "other."



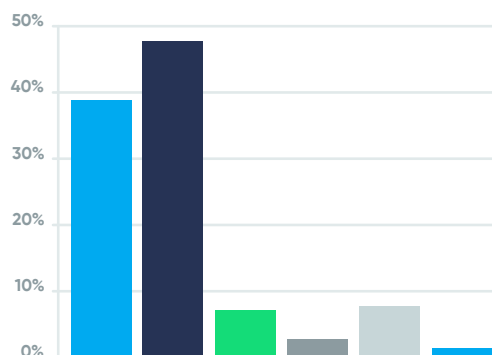
If you have a negative in-store customer experience, how likely are you to tell others about it?



## 47% say that physical stores have done an average job informing visitors about health policies

38.1% say that physical stores have done a very good job keeping visitors informed about their health and safety policies, while 47.2% say they've done an average job. Only 5.9% say they've done a very bad job. The remainder replied that they haven't visited any stores in person in the past six months (2%), they don't know (6.2%), or "other" (0.6%).

When visiting physical stores over the past 6 months, generally speaking, how would you say stores have done at keeping visitors informed about their health and safety policies?



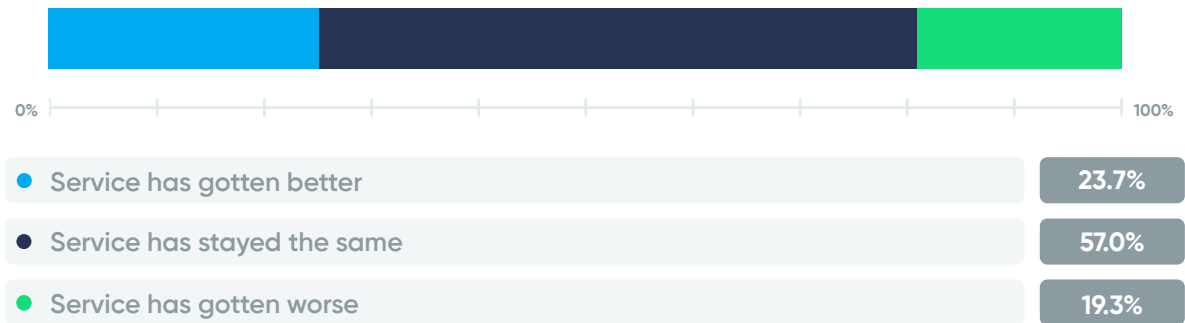
## 57% say customer service has stayed the same

Now that customers are returning to physical stores, have they noticed a change in customer service? Not necessarily, as 57% say that service has stayed the same. 23.7% say that service has gotten better, while 19.3% say that service has gotten worse.





### How has the in-store customer service you receive while visiting physical stores changed in 2022?



## Summary

There’s more to a store visit than just purchasing a product, and respondents are clear that when visiting a business’s physical location, they’re looking to have an experience to go with their purchase. Whether it be being able to try new products, receiving engaging customer service, or learning about the brand through interactive displays and multimedia, eight out of ten respondents say that the in-store experience is important to them.

More than just being important, 86% admit that a positive in-store experience will get them to return to that business again. Providing enjoyable in-store experiences can also increase the amount a customer spends in the store, and drive their business to the website as well.

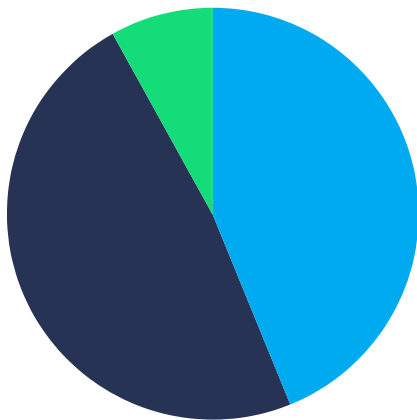
When customers have positive experiences, they tell others – and they also tell others about the negative experiences they have, too, and just as frequently. Businesses who neglect providing positive and engaging in-store experiences need to realize that 46% of respondents have stopped shopping with a brand because of this.

**PART 3**  
**Purchasing Habits**

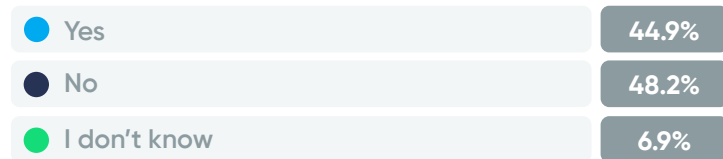
Customer shopping behaviors have changed, as well as purchasing habits when it comes to everyday necessities and specialty items. Are customers switching brands and replacing products they used to buy in person with online purchases? Or have their habits stayed the same?

### 45% have replaced purchases previously made in-store with online purchases

Is online shopping swallowing in-store business? Not completely, but perhaps steadily, as 44.9% said that they have replaced products they previously purchased regularly at physical stores with online competitors or alternatives. However, 48.2% said they have not replaced in-store purchases with online alternatives.

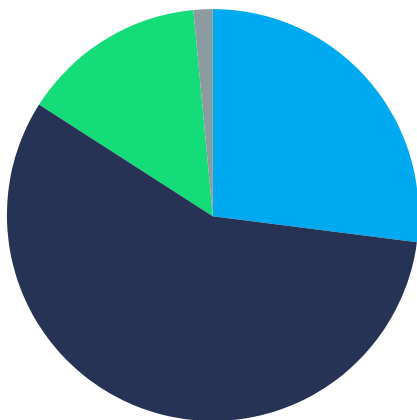


Over the past 6 months, have you replaced products you previously purchased regularly at physical stores with online competitors/alternatives?

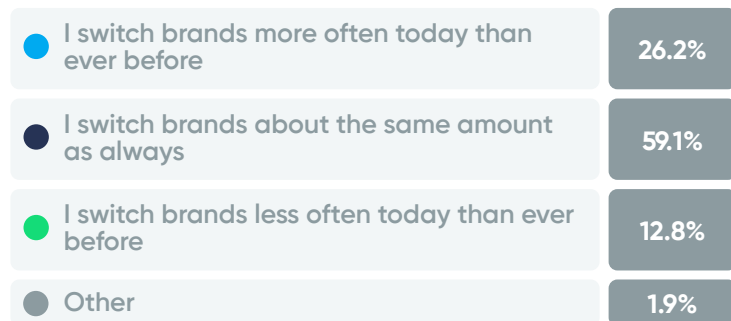


### 26% say they switch brands more often than they always have

In a related question, 59.1% say they switch brands about the same amount as always, meaning they stick with brands they like for certain purchases and have no affinity for others. 26.2% say they switch brands more often today than ever before, while 12.8% say they switch brands less often today than ever before.



Which of the following statements is the most accurate?



## 79% want details about a product in order to make an informed purchase

When it comes to making informed purchases, 79.4% say that they are more likely to purchase a product if they have all the details typically made available online, like customer reviews, social media posts, and styling tips. However, 20.6% say that these things don't have an effect.

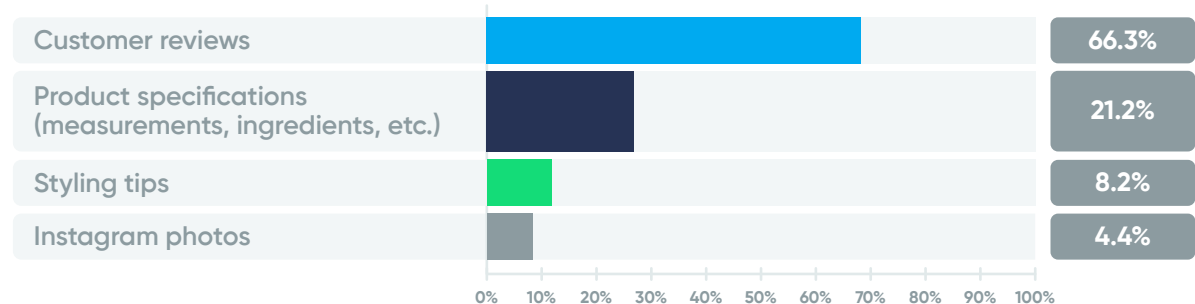
Are you more likely to purchase a product if given all details typically available online (i.e. customer reviews, Instagram photos, styling tips)



## Customer reviews are the most valuable when evaluating a product to purchase

For those who replied “yes” above, respondents value customer reviews (66.3%) the most to help them make a purchase, followed by product specifications like measurements and ingredients (21.2%). 8.2% prefer styling tips and 4.4% prefer Instagram photos.

If yes, which of the following product details do you find most valuable?



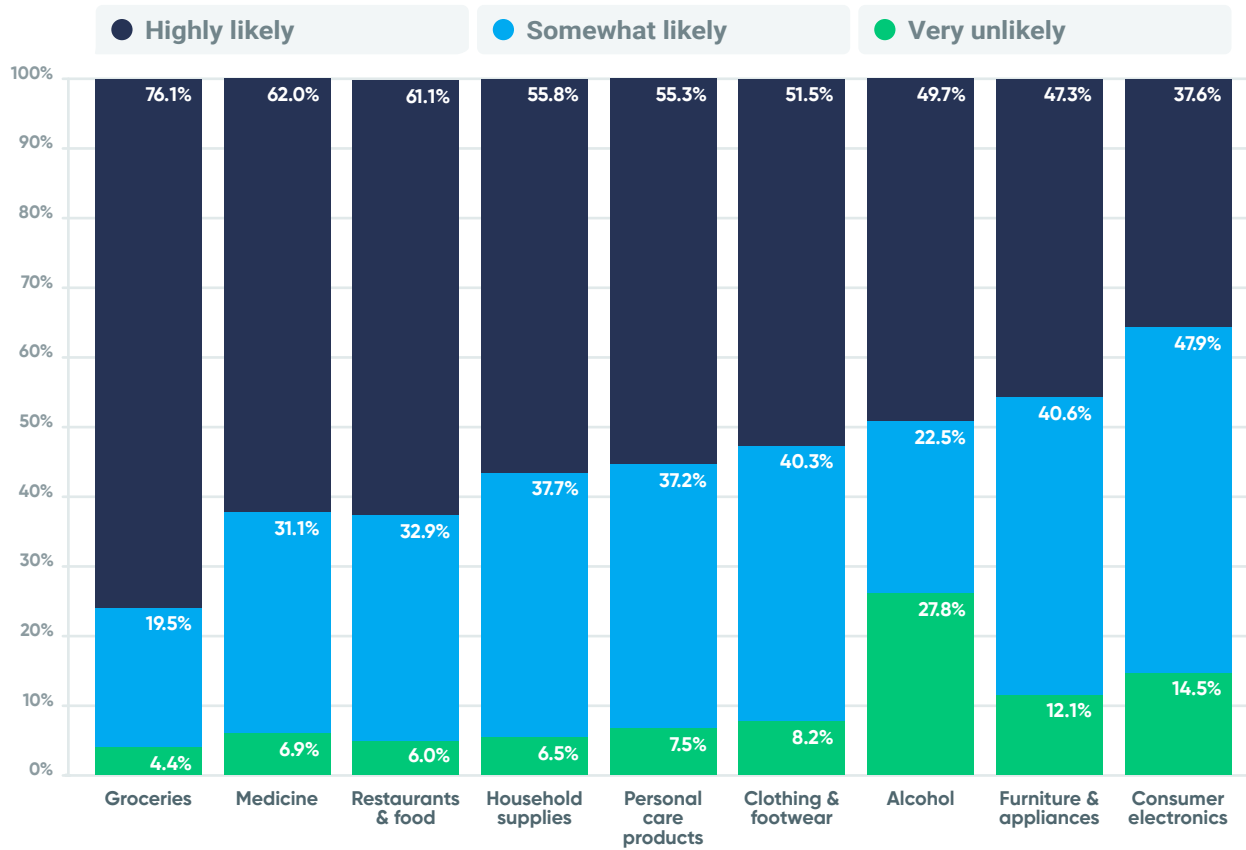
## Respondents are heading to a physical location to purchase groceries and medicine, and to eat out at restaurants

Respondents said they were “highly likely” to visit a physical location to purchase the following:

- Groceries (76.1%)
- Medicine (62%)
- Food (including Restaurants) (61.1%)
- Household supplies (55.8%)
- Personal care products (55.3%)
- Clothing and footwear (51.5%)
- Alcohol (49.7%)
- Furniture and appliances (47.3%)
- Consumer electronics (37.6%)



Today, how likely are you to visit a physical location to purchase the following items?



## Summary

Have respondents swapped online purchases for products they used to purchase in a store? 45% say they have replaced purchases previously made in-store with online purchases. This could include simply purchasing the same products from a retailer's online store rather than going in-person, but this could also mean replacing products with those from other brands online – likely because they're less expensive. With 26% stating that they switch brands more often today than they have before, managers and owners of physical stores should actively think about how they can draw in traffic – and keep it.

## **PART 4**

# **Creating and Delivering a Memorable In-Store Experience**

As we've seen above, 81% of respondents say that the in-store experience is important to them, and a positive in-store experience can lead to increased foot traffic and higher sales. But are businesses offering what customers are looking for, and will that keep them coming back?

## Top Three Factors Influencing the In-Store Experience

What creates a great in-store experience? Respondents said it's the following:

37.1%

### The product selection and variety available at the location

Stepping into a store and finding a large variety of products on the shelves is the main thing that contributes to a great in-store experience. This could be either because having a large variety of products is a rarity due to recent supply chain issues, or well-stocked shelves of many different products could mirror the variety found online.

29.7%

### The quality of service from the staff at the location

Respondents say that the quality of customer service — being greeted, being helped, being cashed out quickly — is what makes or breaks their experience.

13.2%

### The location, layout, and organization of products

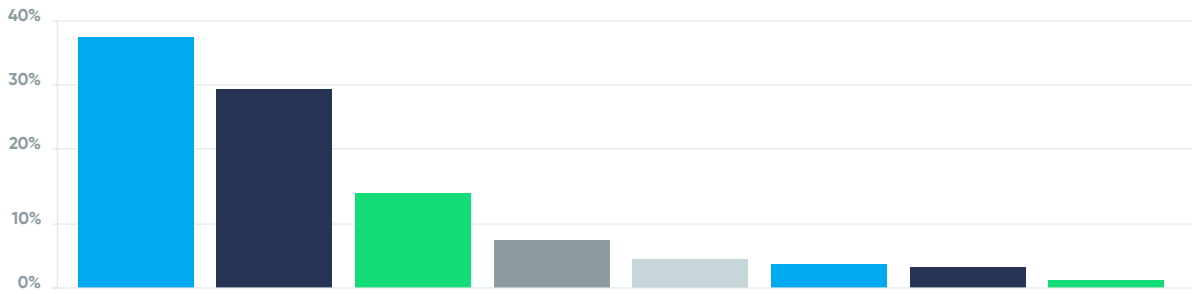
A clean store where aisles and items are easy to find and well-showcased also contributes to a great in-store experience.

Other factors include the amount of time it takes to checkout and pay (7.0%), the health and safety protocols at the physical location (4.3%), the ability to easily find information at the physical location (3.7%), or the level of entertainment or fun at the physical location (3.2%). Those who replied “other” (1.3%) listed reasons including “how I see the staff treated,” “prices,” “the location of the store,” and “whether or not it has self check out.”

Last year, the top factor influencing the in-store experience was the quality of customer service, followed by the variety, quality, and availability of products. The fact that product selection and variety made it to the top this year is likely due to supply chain shortages — customers are delighted to find that a store actually has what they're looking for.



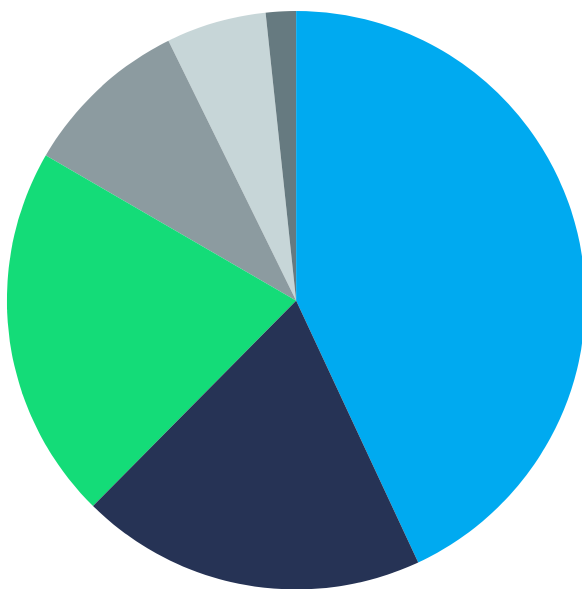
### What factor has the biggest influence on your in-store customer experience?



<span style="color: #00AEEF;">●</span> The product selection and variety available at the location	37.1%
<span style="color: #192F4A;">●</span> The quality of service from the staff at the location	29.7%
<span style="color: #00B050;">●</span> The location layout and organization of products	13.2%
<span style="color: #666666;">●</span> The amount of time it takes me to checkout and pay	7.0%
<span style="color: #A9A9A9;">●</span> The health and safety protocols at the physical location	4.3%
<span style="color: #00AEEF;">●</span> The ability to easily find information at the physical location	3.7%
<span style="color: #192F4A;">●</span> The level of entertainment/fun at the physical location	3.2%
<span style="color: #00B050;">●</span> Other	1.3%

### Product price is the number one factor influencing where customers shop

When a customer is deciding which physical location to frequent, the top factor that influences their decision is the price of products or services (42.9%). Availability of products or services is the second most influential factor (20.8%), followed by convenience (22.4%). Fewer respondents cited service (8%), speed (4.9%), and "other" (1%), which included answers like "clean, organized atmosphere," "quality," and "location."



When you are deciding where to shop at a physical location, what's the most important factor?

<span style="color: #00AEEF;">●</span> Price	42.9%
<span style="color: #192F4A;">●</span> Convenience	22.4%
<span style="color: #00B050;">●</span> Availability	20.8%
<span style="color: #666666;">●</span> Service	8.0%
<span style="color: #A9A9A9;">●</span> Speed	4.9%
<span style="color: #333333;">●</span> Other	1.0%

## Offering exclusive in-person discounts is the top way to draw customers into a store

What can businesses do to attract customers to their stores? Here's what our respondents said:

34.3%

### Offer exclusive discounts unavailable online

Respondents are looking for the same kinds of discounts they can get online to bring them into brick-and-mortar locations.

18.7%

### Offer experiences that make visiting in person more fun

Customers also want unique, fun, and engaging experiences that will draw them in, entertain them, teach them something, and more.

16.2%

### Offer exclusive products unavailable online

Similar to the discounts above, respondents are looking for offerings that can't be found online, and that can make the shopping trip worthwhile.

Other suggestions include offering better customer service (14.3%), nothing for the moment (10.2%), or making health and safety protocols more clear (5.2%). Those who replied "other" (1.1%) listed suggestions including "product availability," "lower prices," "streamline the experience: quick, hassle-free, low cost, high quality," and "multiple open registers and cashiers available."

Last year, respondents said that the number one thing businesses could do to draw them in was make the in-store experience more fun, with in-store discounts coming in second. This year, offering exclusive in-store discounts was the top reason by far — likely a request to make the in-store experience as cost-effective as shopping online.

### What can businesses do to encourage you to come visit in person more?



## Summary

We already know that 81% of respondents say that the customer experience is important to them. But what exactly are they looking for in a great in-store experience? For customers in 2022, the product selection and variety available at the location are the top factors influencing whether they have a positive or negative experience. A customer wants to be able to walk into a store, browse the various items there, try products out, compare prices, and leave with their purchase. For retailers, this means ensuring that shelves are stocked and inventory is readily coming in – which has been a challenge nationwide with supply chain issues.

Respondents also say that pricing is the primary influencer of where they decide to shop, and that businesses could draw them in if they offer exclusive in-person discounts.

In putting these answers together, what do customers want in their in-store experience? If you think about what draws customers to shop online, it's the product variety and lower prices. So, respondents essentially want to find the product variety and price of what they see online mirrored in your physical locations.

# **PART 5**

## **Black Friday and Cyber Monday Plans**



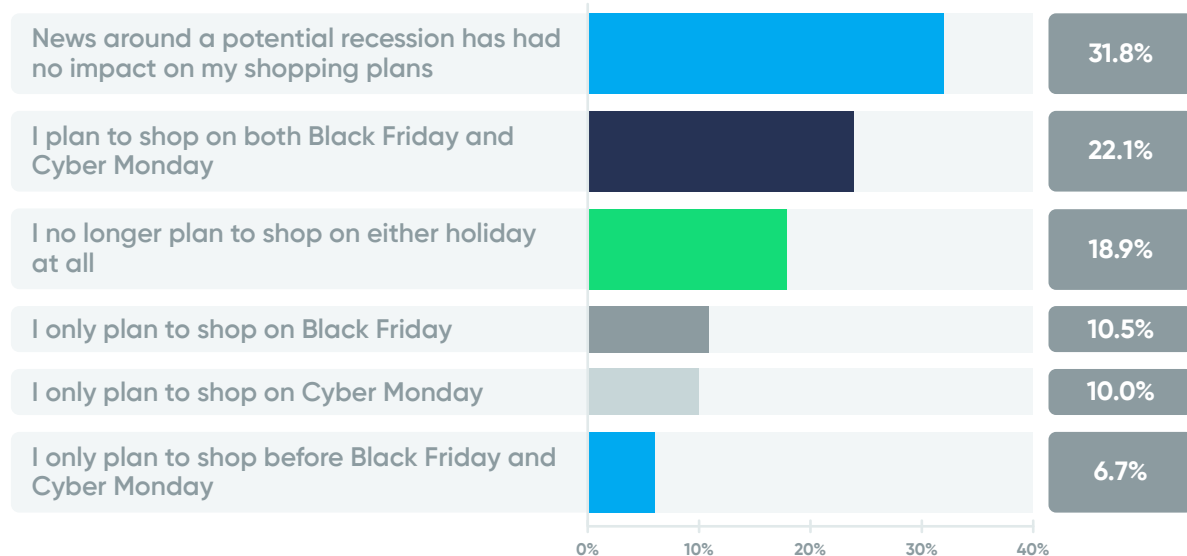
The holidays are never that far away, and with them, holiday spending, officially launching on Black Friday. But after the fluctuating economy and rising costs of this past year, are customers hesitant to continue their previous spending habits?

### Respondents say that the news of a recession has no impact on their holiday shopping plans

Is the state of the economy and the news of a potential recession impacting how customers are thinking about shopping this holiday season? The largest segment (31.8%) said no, and that a potential recession has had no impact on their shopping plans.

Additionally, 22.1% said that they plan to shop on both Black Friday and Cyber Monday this year. 10.5% only plan to shop on Black Friday, 10% only plan to shop on Cyber Monday, and 6.7% only plan to shop before Black Friday and Cyber Monday. Finally, 18.9% said that they no longer plan to shop on either holiday at all.

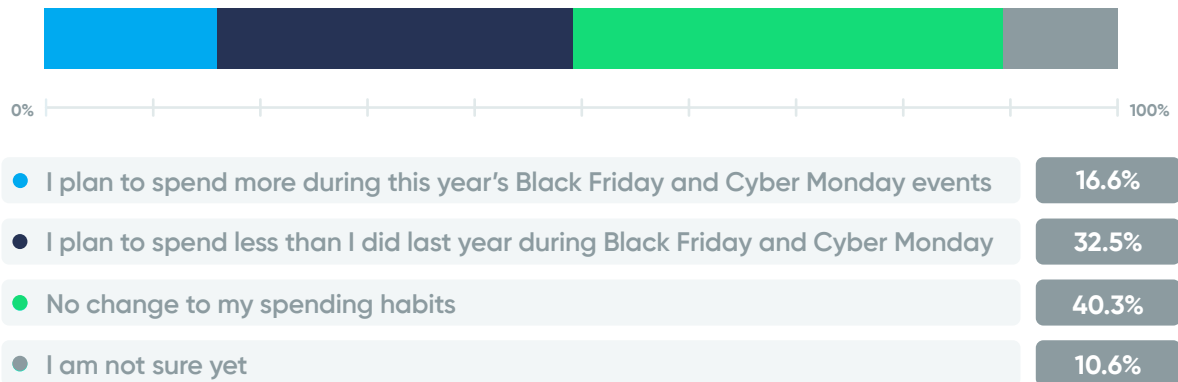
How is news around a potential recession making you reconsider shopping during Black Friday and Cyber Monday?



### 40% said that they don't plan to change their spending habits for Black Friday and Cyber Monday

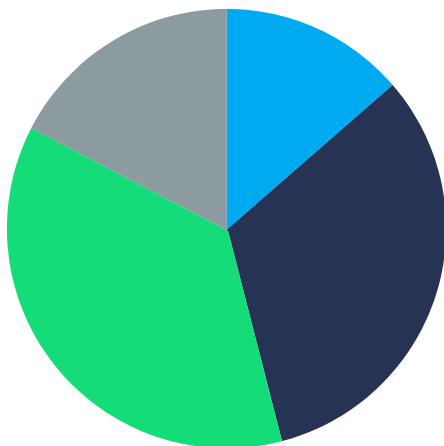
Do respondents expect their shopping habits to change on Black Friday and Cyber Monday this year? 40.3% said no, they don't plan to change their spending habits. However, 32.5% plan to spend less than they did last year during these holidays. 16.6% plan to spend more during this year's Black Friday and Cyber Monday events. 10.6% aren't sure yet.

### How do you expect your spending habits to change during this year's Black Friday and Cyber Monday events?

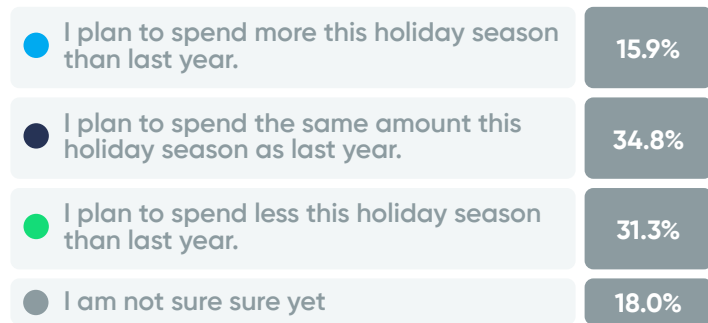


### 35% said they don't plan to change their spending habits for this holiday season

Do respondents expect their shopping habits to change for the holiday season in general? Like above, the largest segment (34.8%) say they plan to spend the same amount this holiday season as compared to last year, while 31.3% say they plan to spend less. 15.9% plan to spend more this holiday season than last year, and 18% aren't sure yet.



### How do you expect your spending habits to change during this year's holiday season?

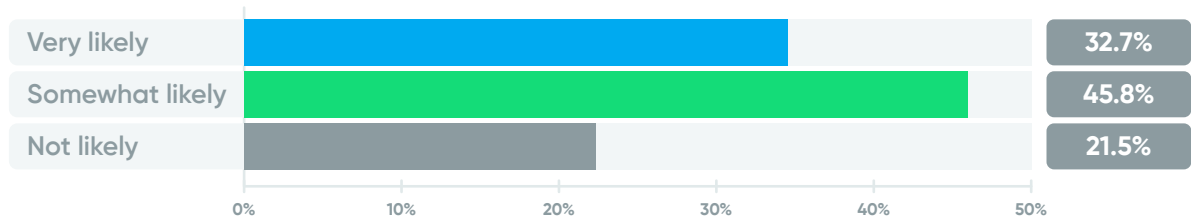


### 33% are confident they'll save money on Black Friday and Cyber Monday

Are our respondents confident that they'll find the best deals this Black Friday and Cyber Monday? 32.7% say they're very likely to save money, while 45.8% say they're somewhat likely to save money. 21.5% say they're not likely at all to save money.



How confident are you in saving money on items during Black Friday and Cyber Monday this year?



## Summary

In looking ahead to the holiday shopping season, our respondents don't seem to be daunted by economic news, and are planning ahead in normal fashion. 40% don't plan to change their spending habits for Black Friday and Cyber Monday, and 35% don't plan to change their spending habits for the holiday season in general. However, 33% plan to spend less than last year during Black Friday and Cyber Monday, and 31% plan to spend less on the holiday season — so perhaps the economy is an impacting factor after all.



## Conclusion

Focusing on the in-store customer experience is more necessary now than ever. While the death of brick-and-mortar continues to be a rumor, retailers can't get complacent about the products they stock, store layout, customer service, interactive offerings, and more, as online options are waiting to lure consumers away. And even one negative in-store experience will drive customers away for good.

What can retailers do? First, recognize that consumers still find great value in having a positive in-store experience – they want to engage with your brand in fun and exciting ways, and find the products and services they're looking for as well.

Then, ask how you can create a better in-store experience for your customers. It may be adding new technology to make the visit more streamlined, or offering the ability to interact with products. Maybe it's investing in better customer service training for your associates, or rolling out a menu of discounts and initiatives that are only offered in the store.

Providing a great in-store experience will not only offer customers a fun and unique outing at your location, it can also increase their loyalty and affinity, increase your sales, and get them to come back – and tell others about the wonderful experience they had in your store, too.

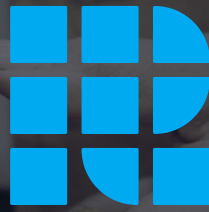
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