



Unified Commerce: Sports & Recreation

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Agenda

- 01 State of Sports & Recreation
- 02 Strategic Priorities
- 03 Unified by Design
- 04 Retail and eCommerce

01

State of Sports & Recreation



The sports and recreation market is growing across the globe.

In 2024, Asia dominated the sports equipment market while North America stood out for its rapid sports apparel expansion.

Market Growth

3.8%

Expected CAGR globally over the next 5 years.¹

Challenger Brand Dominance

18%

Increase in revenues for challenger brands (between 2020- 2024 — 14 percentage points above incumbents²

Regional Makeup

\$98B

Of Revenue contributed to Asia, compared to opportunistic North America at \$26B¹.

Ecommerce Share

30%

Ecommerce sales as a share of total sales in the S&R by 2027, nearly doubling since 2017.¹



Driven by a rise in consumer spend and digital adoption, North America is continuing to dominate in ecommerce

Ecommerce Growth

+110%

Expected increase in sports & rec ecommerce sales share from 2017-2027, compared to 80% globally.¹

Wholesale Distribution

+4.2%

Growth in sports & rec products through wholesale, boosted by high category growth in sports like pickleball.²

Regional Dominance

40%

Of athleisure market share held by North American companies, as brands strive to meet growing consumer demand for attire that blends performance with style.³

Privatization

42%

Of private equity transactions in the sports & rec vertical housed by North America from 2019-2024.⁴



02

Strategic Priorities



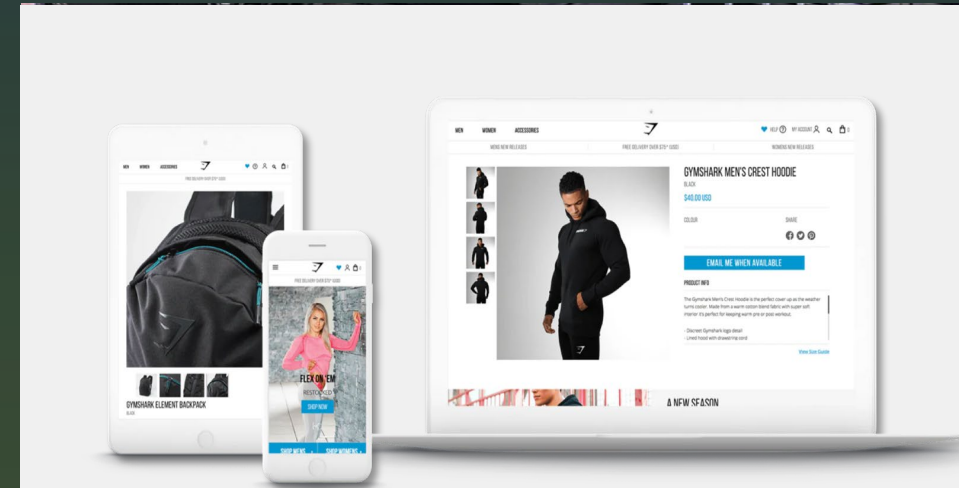
Seamless omnichannel is your home run

Consumers increasingly blend online and offline channels for discovery and purchases. This makes it critical for merchants to develop frictionless strategies that connect digital and physical touchpoints into one, cohesive story.

A connected tech stack is essential for smooth data flow and integration and enhances decisionmaking and personalization.

73%

Of Sports and Recreation merchants reported omnichannel as a high or top priority for their organization's commerce strategy.¹



Shopify Customer

Gymshark

POS

Gymshark bridges the gap between its digital and physical experiences and unlocks a new revenue stream by activating Shopify POS at its in-person events so attendees can make purchases in person.

"It bridges the gap between the digital and physical worlds and creates emotional customer experiences that can't be had online alone." Daniel Knight, GS Brand Manager



Shopify Customer

Toby's

From Mall to Online

Toby's, the Philippines' first and largest specialty sports store with 67+ locations created an omnichannel experience to blend its love for mall culture with the convenience of online shopping.

13.5x Increase in sales

101% Improvement in profitability

50% Increase in conversions



Lower costs, higher scores

Streamline operations, disparate technology systems, processes, and partnerships to cut costs and make better decisions, helping to drive sustainable growth in a competitive market.

77%

Of Sports and Rec merchants consider improving operational efficiency as a high or top priority for their organization's commerce strategy.¹

15-25%

Cost savings of IT spend (application budget) realized by companies with standardized systems?²



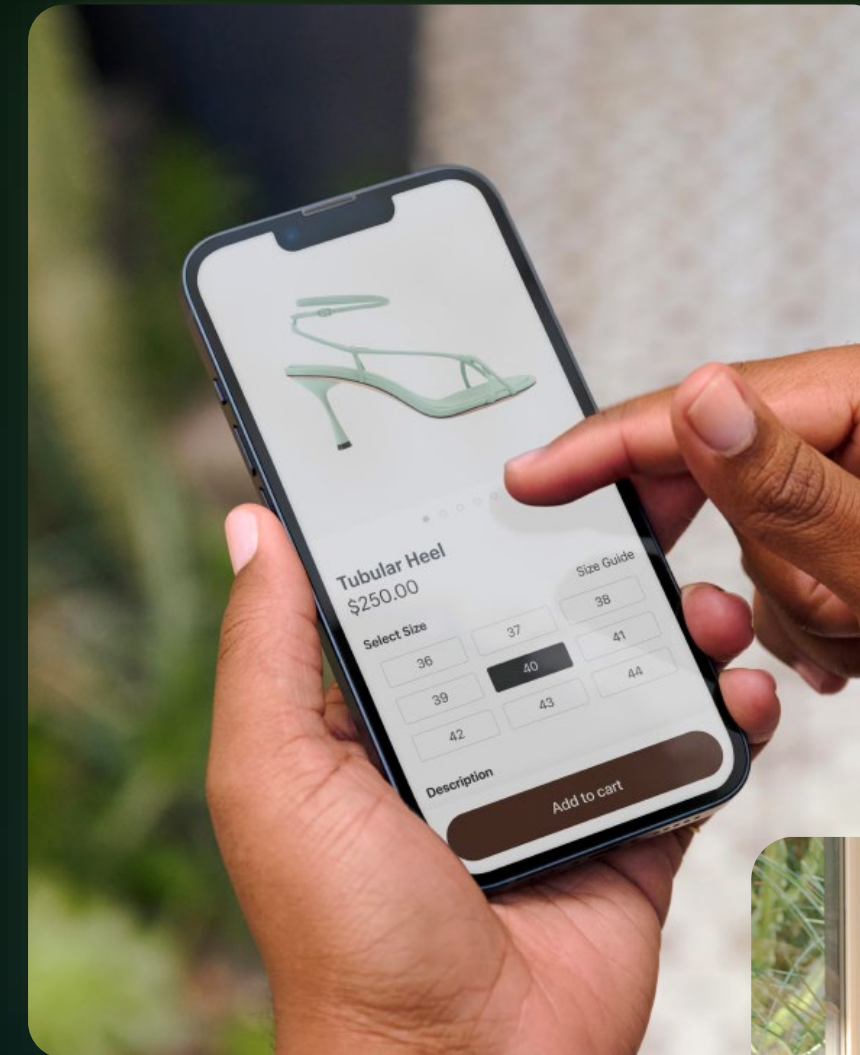
03

Unified by Design



Commerce is connected

Today's consumers expect a seamless shopping experience that goes from in store, to online, and everywhere in between.



Browse online → Buy in-store

Browse in-store → Buy online

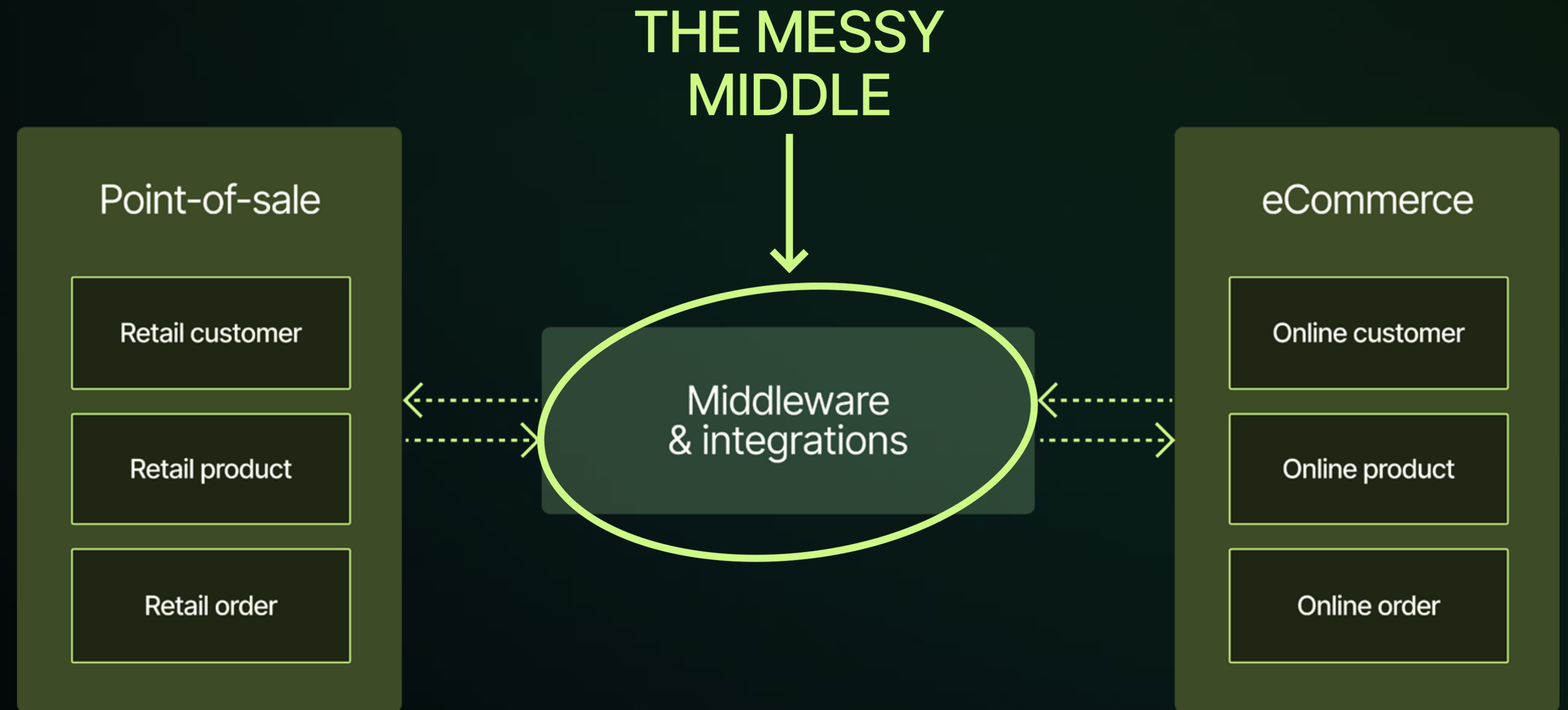
Buy online → Pick up in store

Buy in-store → Deliver home



But getting it right isn't easy

Scaling a unified shopping experience is difficult to achieve when in store and online channels are managed in different systems.



Shopify is the only solution on the
market that delivers true and
effective unified commerce for in-
person retailers



Shopify is unified by design

22%
BETTER POS
SYSTEM COSTS

Cost efficiency

Unify ecommerce and POS channels without middleware, integrations, custom development, and associated costs.

20%
FASTER POS
IMPLEMENTATION

Implementation speed

Open stores faster with accelerated POS configuration, with fewer costs associated with training and change management.

5%
EQUIVALENT
SALES UPLIFT

Operational efficiency

Boost staff productivity by centralizing operations, workflows, and back-end processes for ecommerce and POS.

8.9%
ANNUAL
SALES UPLIFT

Sales growth

Use native omnichannel fulfillment and customer data capture to accelerate revenue growth across online and physical channels.



Outcomes



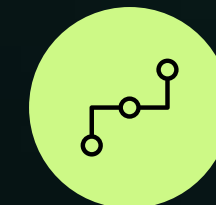
Customer experience

Craft the seamless, personalized shopping experiences your customers want, both in store and online.



Data quality

No more discrepancies in reporting or manual reconciliation. Maintain one source of truth for sales data.



Integration

Shopify is the commerce arm of a best-in-class tech ecosystem, powering third-party platforms with high quality data.

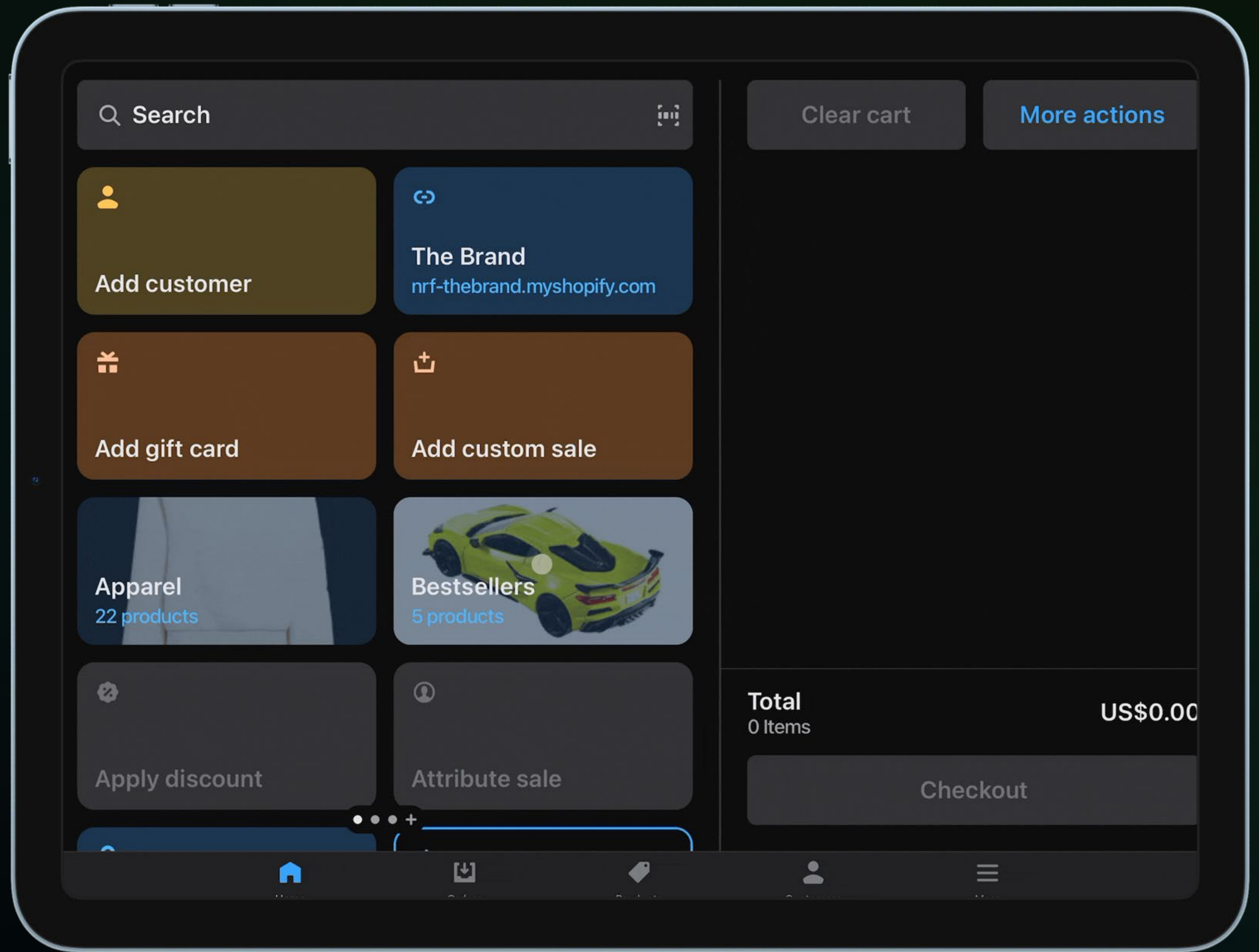
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Retail and eCommerce



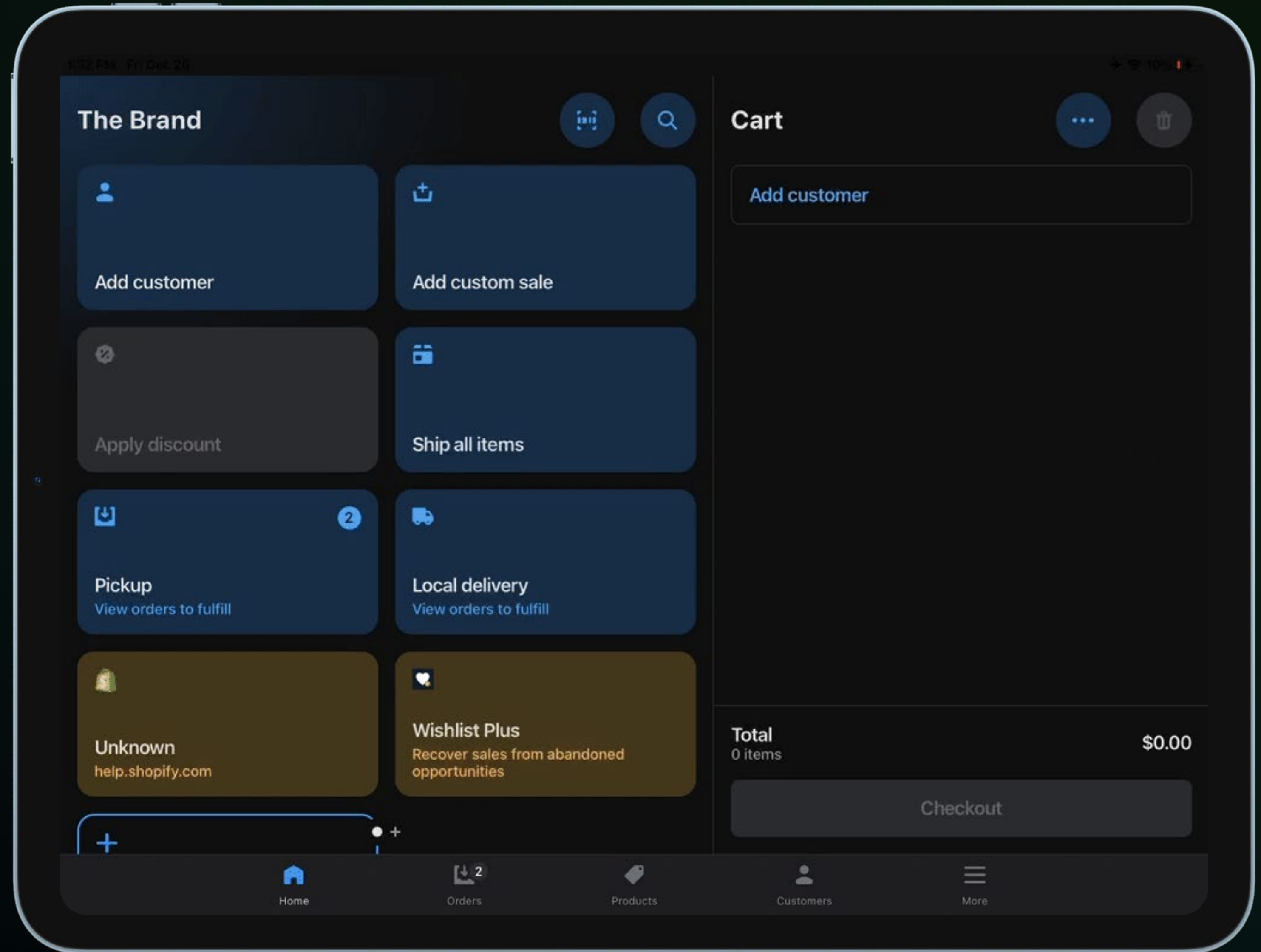
Realtime inventory

See real time available inventory across channels for a seamless customer experience



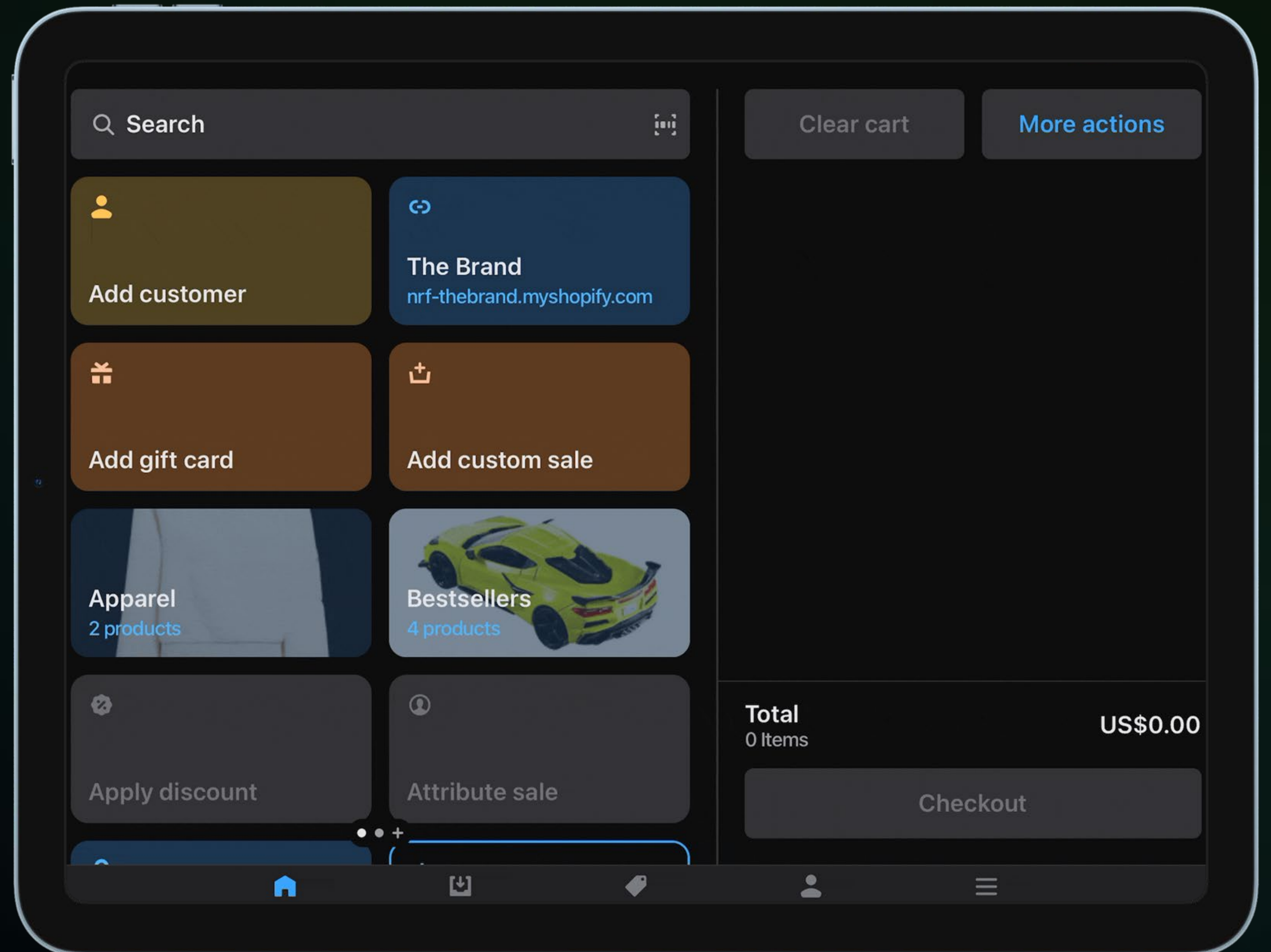
Unified customer profiles

Create customer accounts from any channel that are instantly available across your entire business.



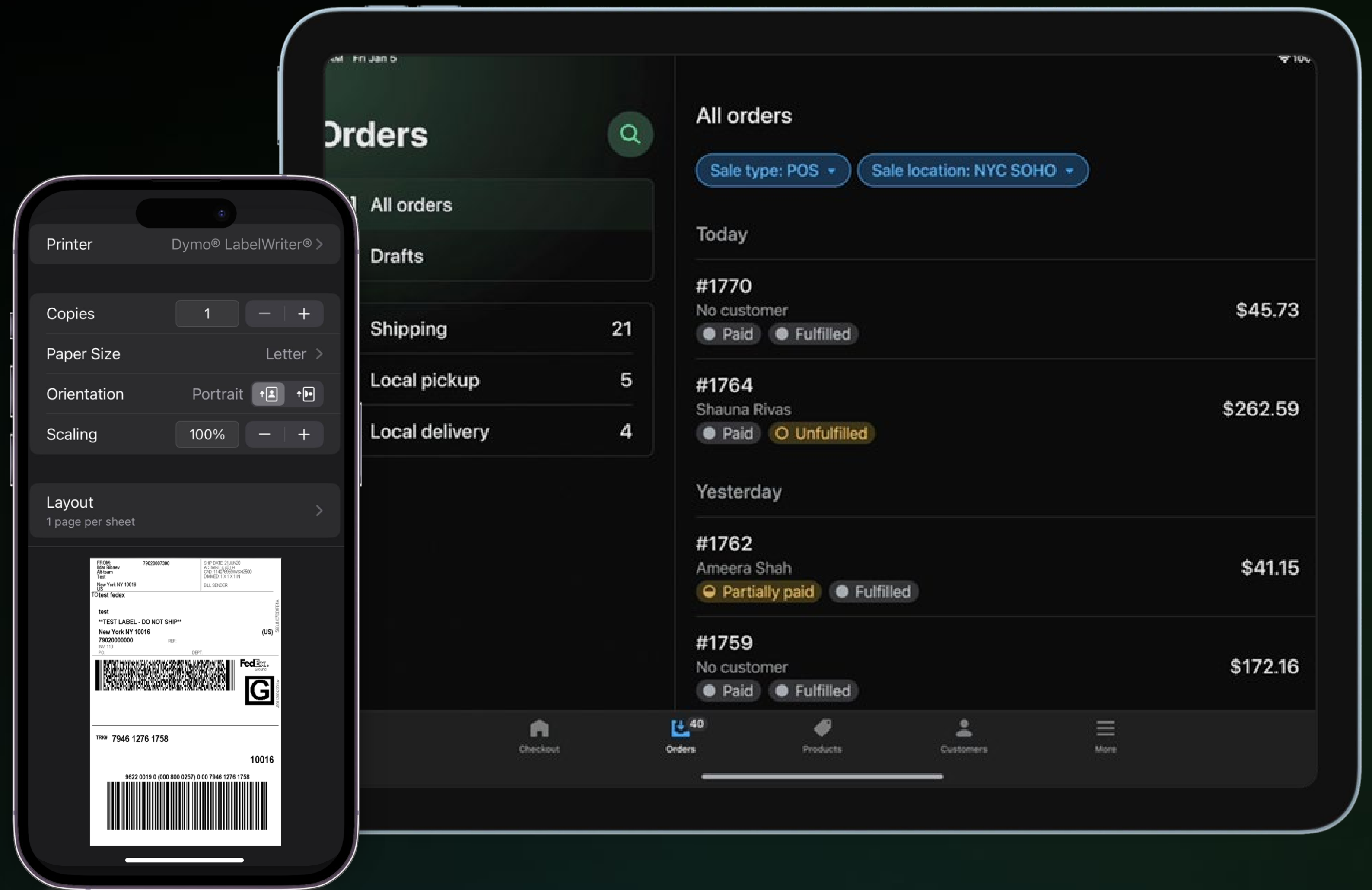
Flexible shopping

BOPIS, shipto-customer, seamless returns and exchanges, email carts, and more—all out of the box.



In-store fulfillment

Reduce shipping time and costs by leveraging your retail stores and staff to fulfill online orders.



Aiming for a home run



Key Business Needs to Achieve Priorities

Strategic Innovation

- Invest in technology and data that enables high levels of scalable customization
- Boost loyalty and engagement with subscriptions, community-based groups, and novel events

Optimize Revenue Growth

- Introduce integrations that address building customer loyalty and a high-quality customer experience
- Ensure consistency in shopping experiences between channels

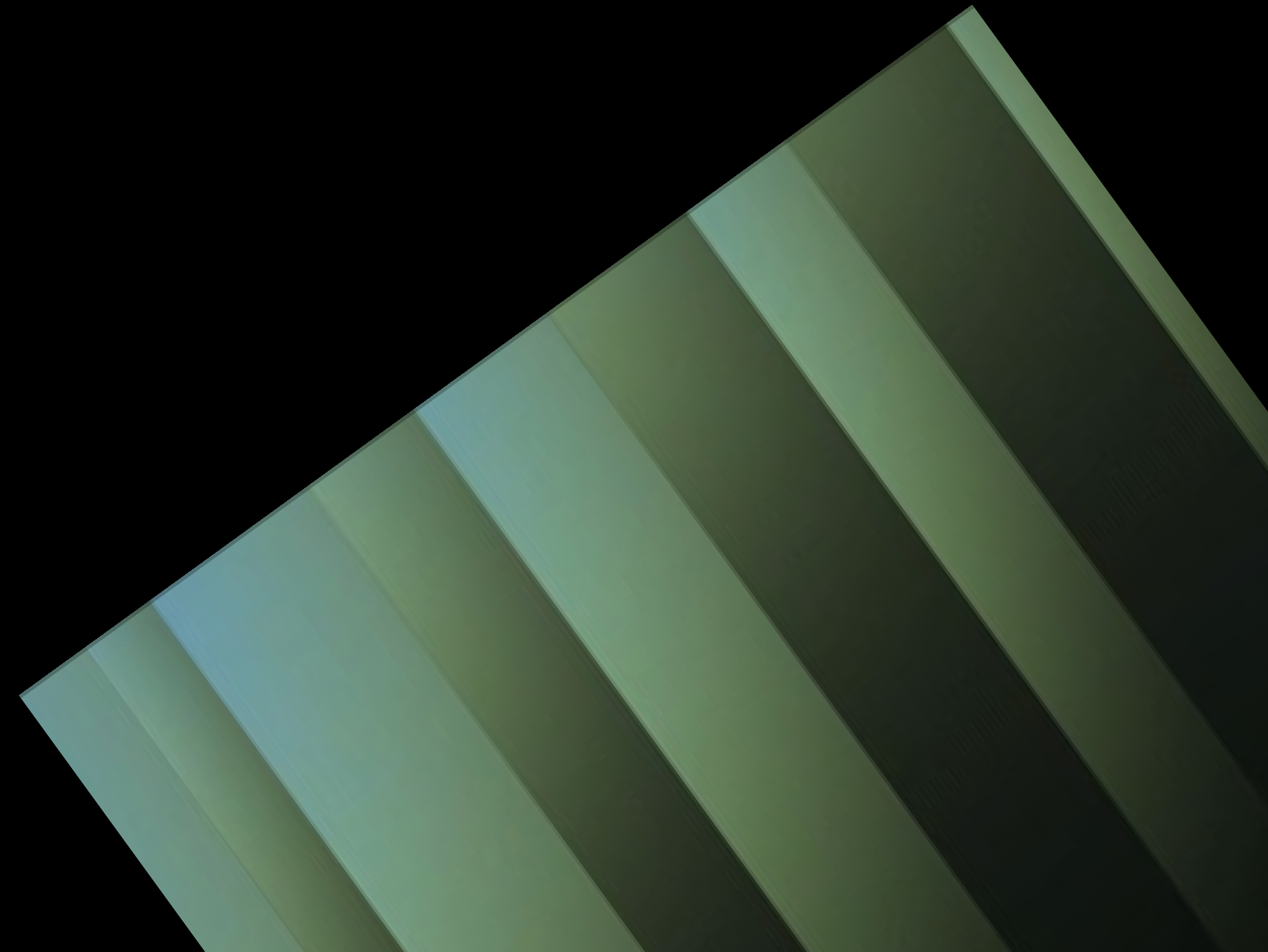
Reduce Operational Complexity

- Unify data and back-end systems across all channels
- Establish reliable supply chain and inventory management across online, offline, and third-party platforms.





Thank you





SOURCE
FOR SPORTS™

WE FIT
YOUR GAME.™

OUR BRAND

What makes us different?



INDEPENDENT OWNERS



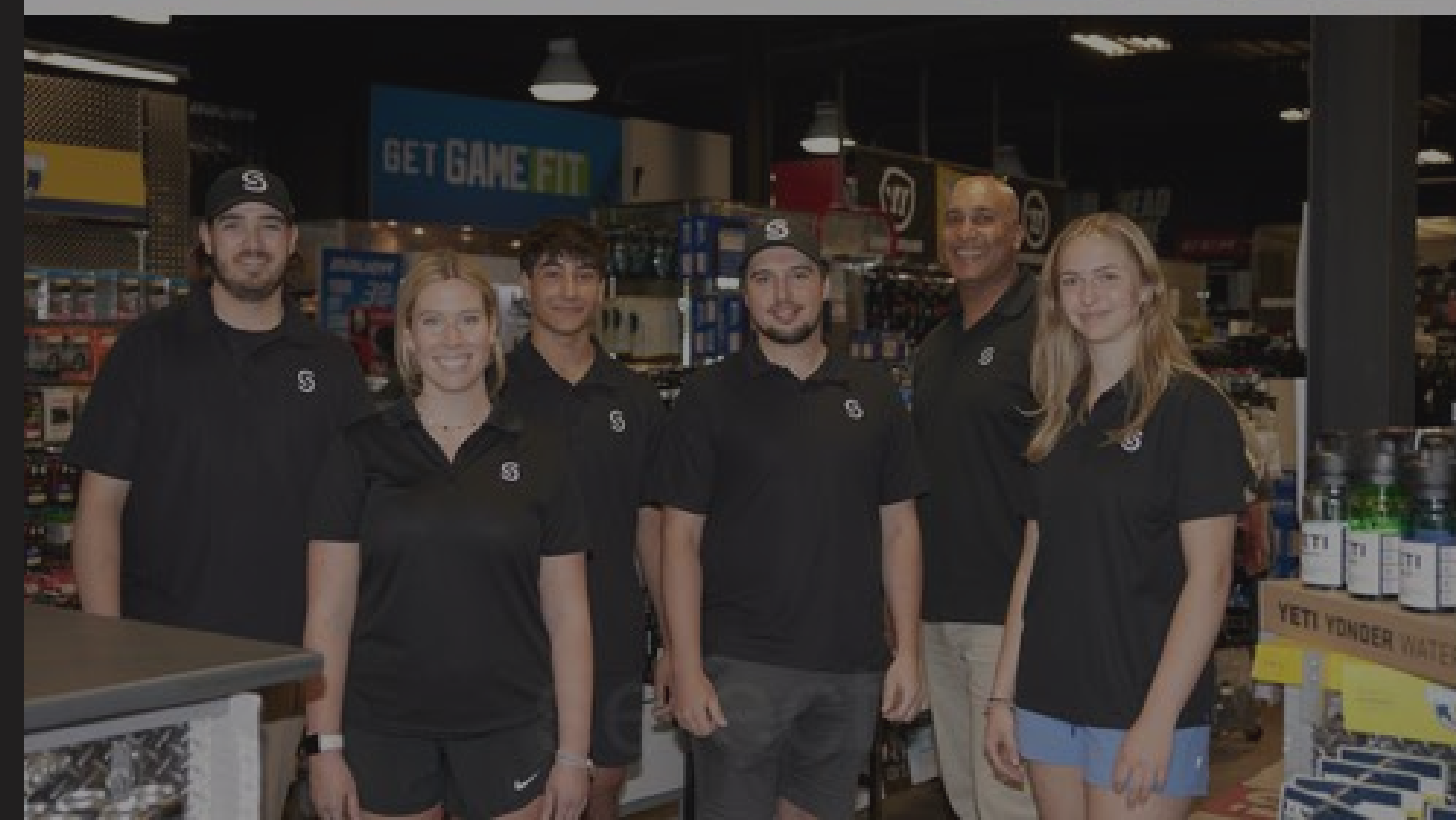


**STRONG SENSE
OF COMMUNITY**





PERSONALIZED SERVICE & EXPERT ADVICE FROM STAFF



COMMITMENT TO FIT

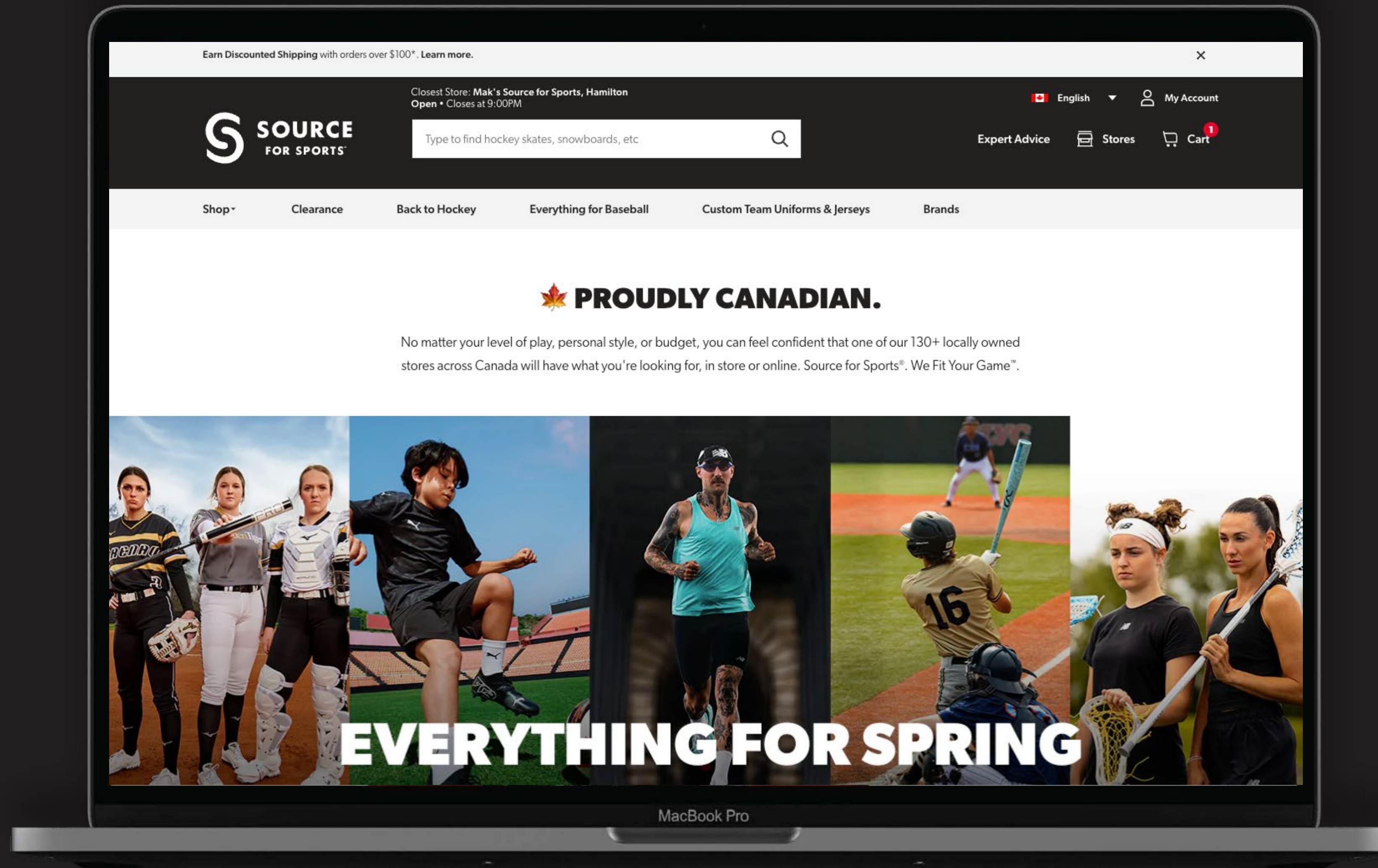


**STRONG RETAIL PRESENCE
FROM COAST TO COAST**

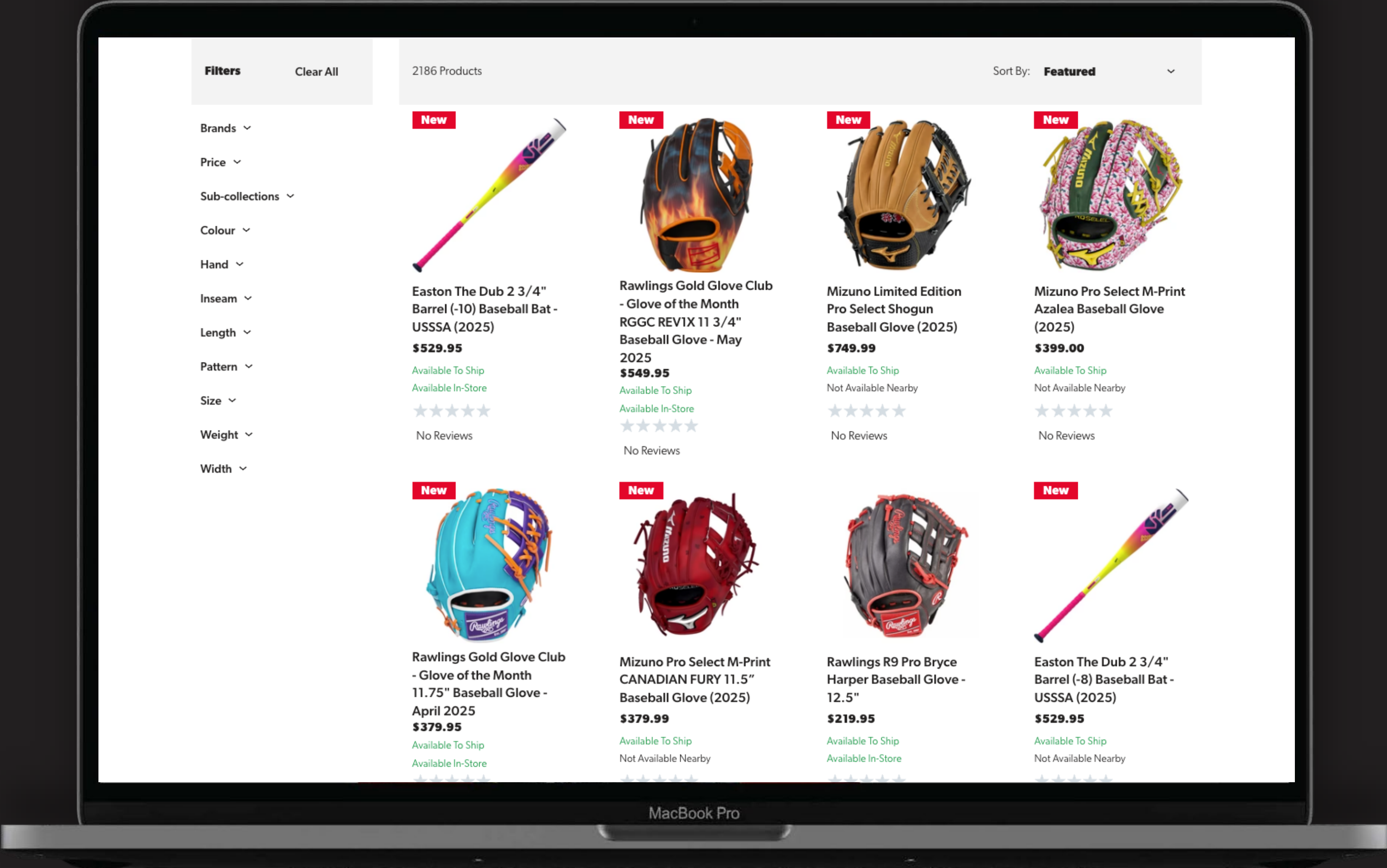




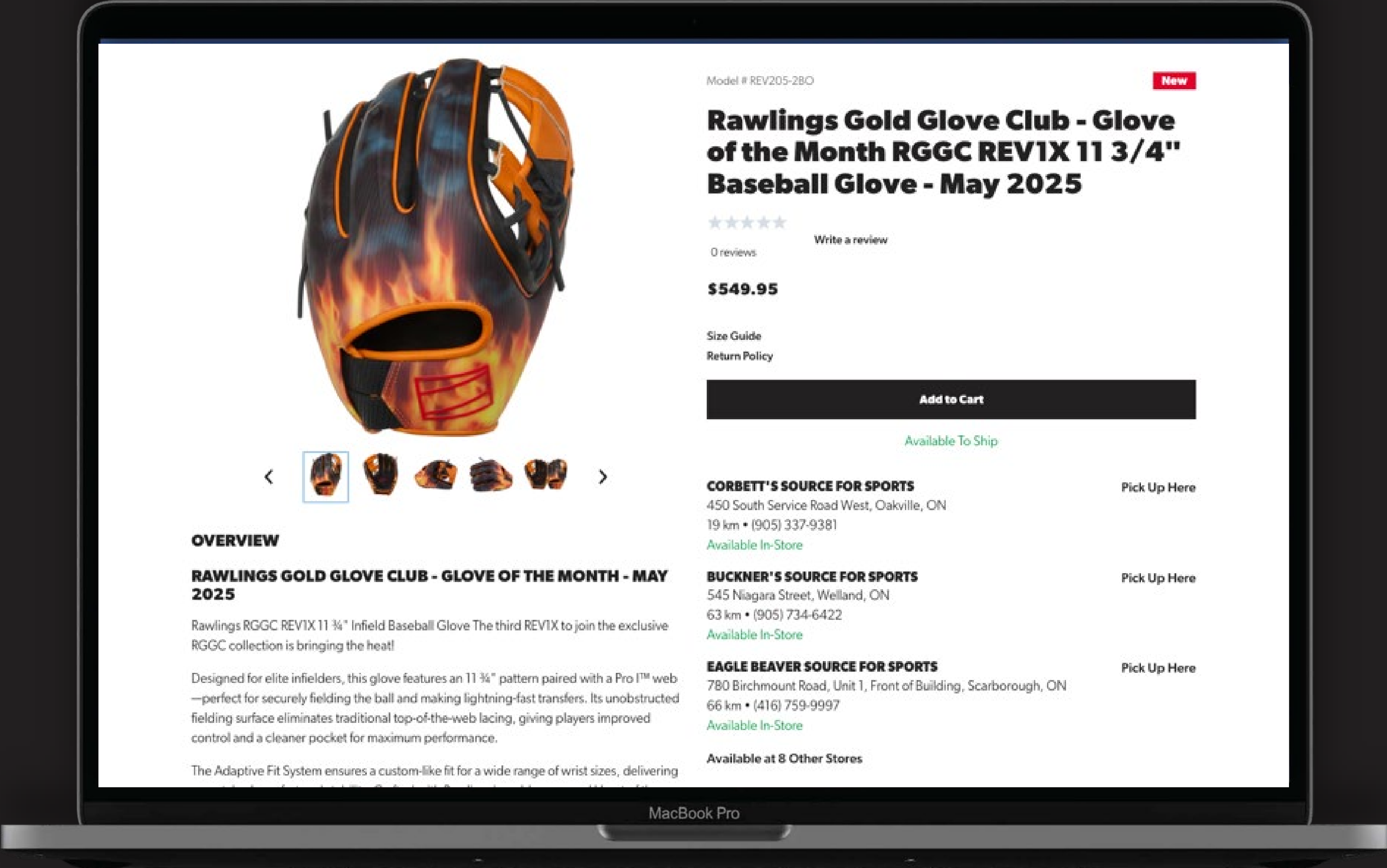
Our website connects customers to our products and stores.



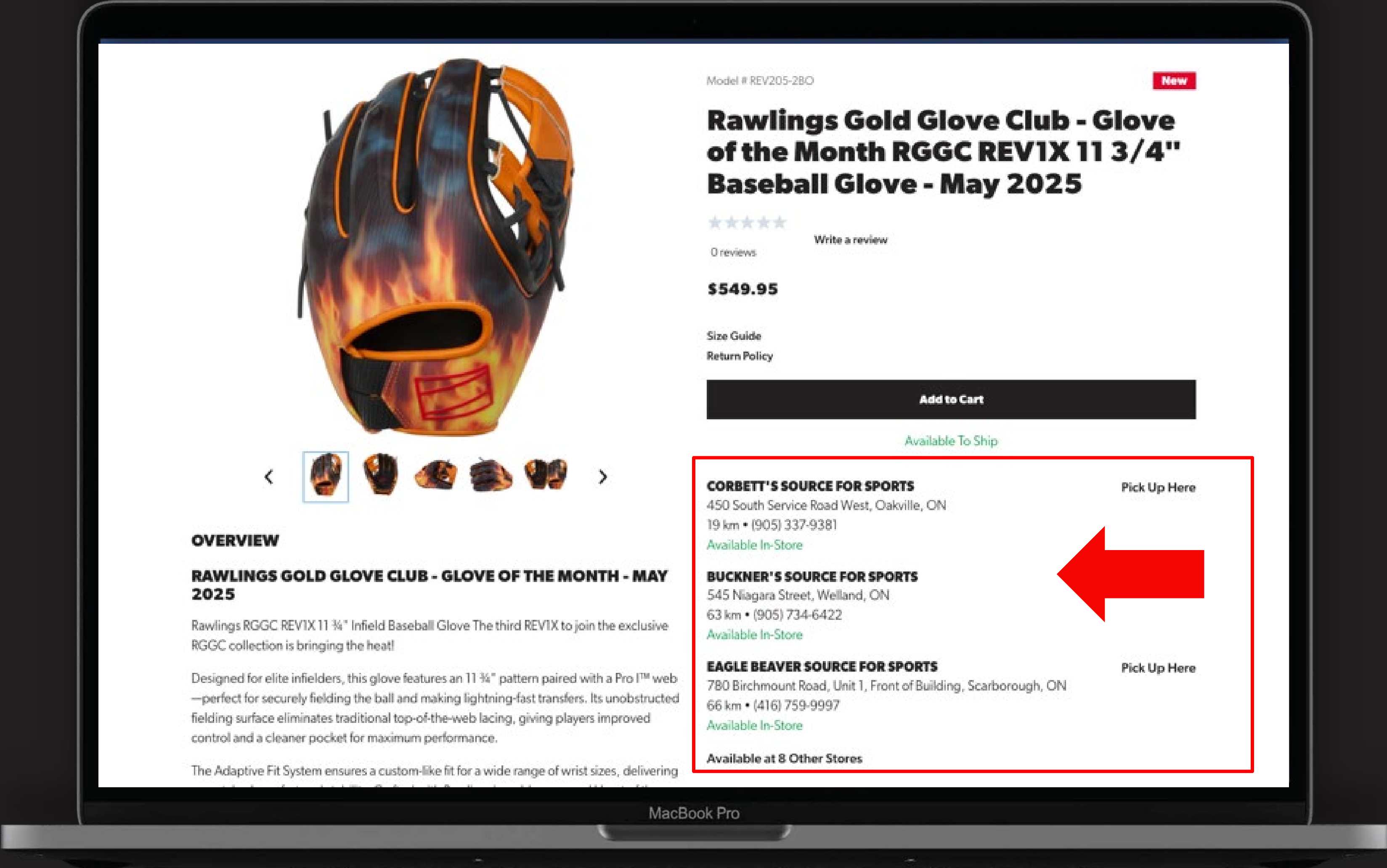
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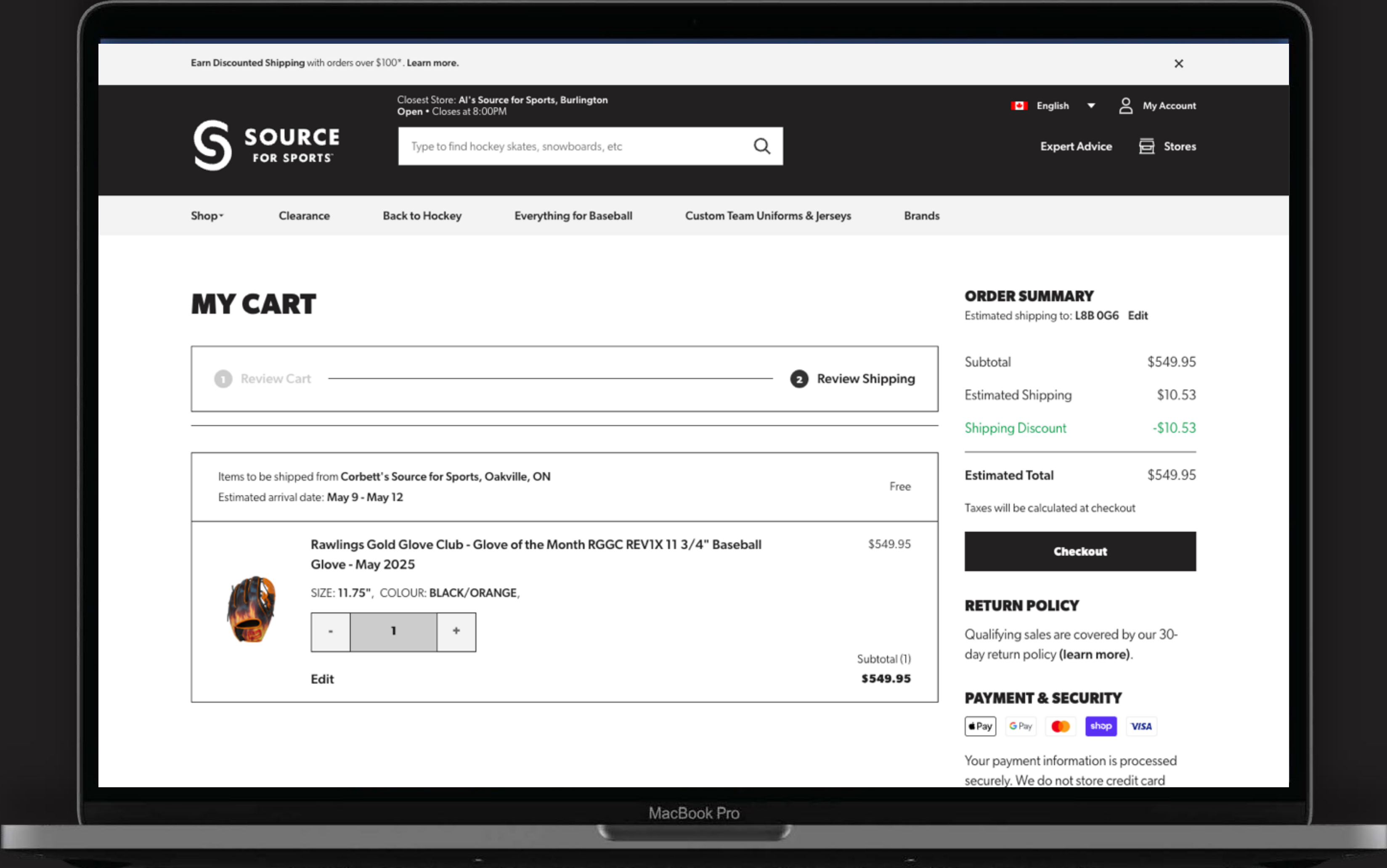
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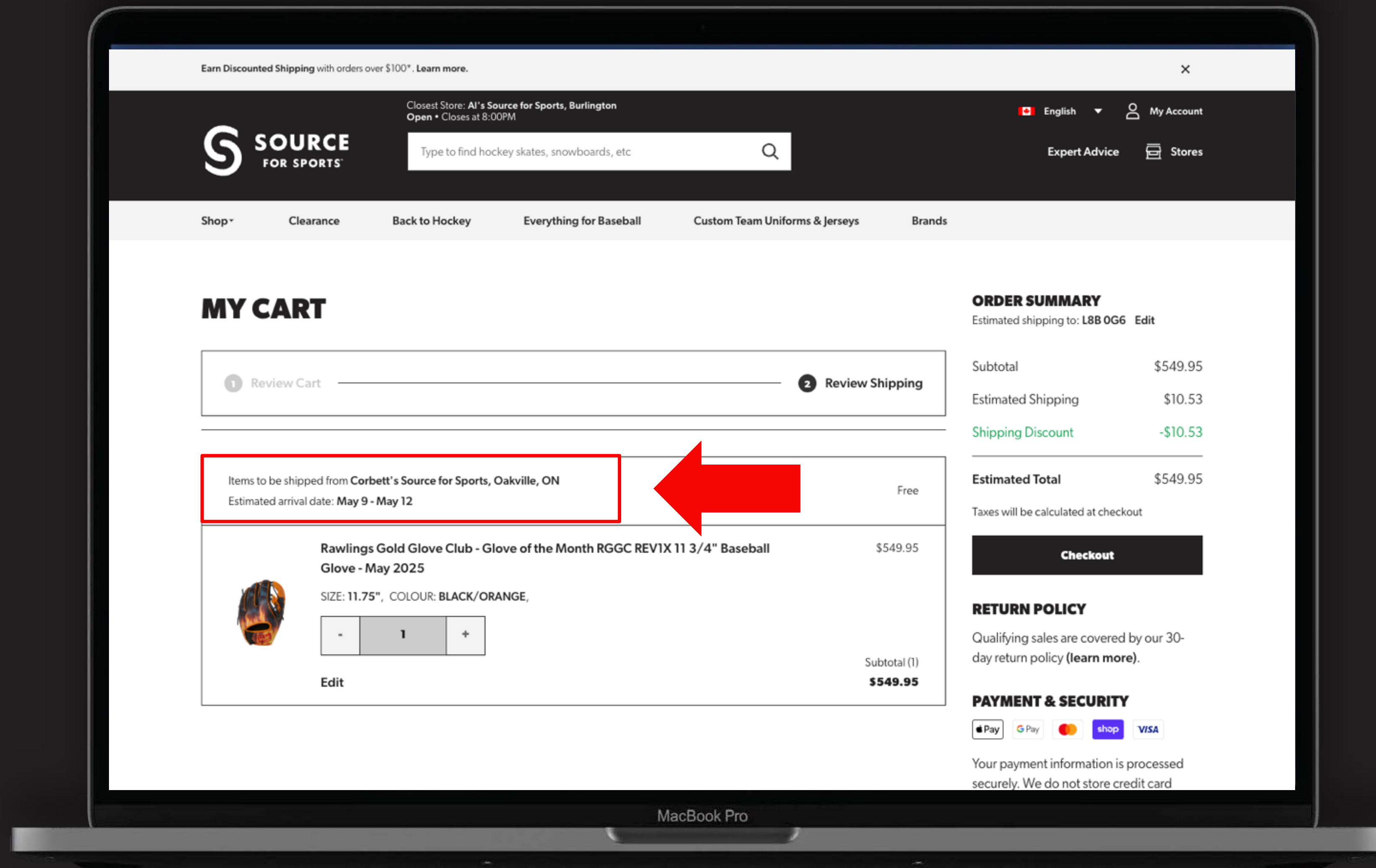
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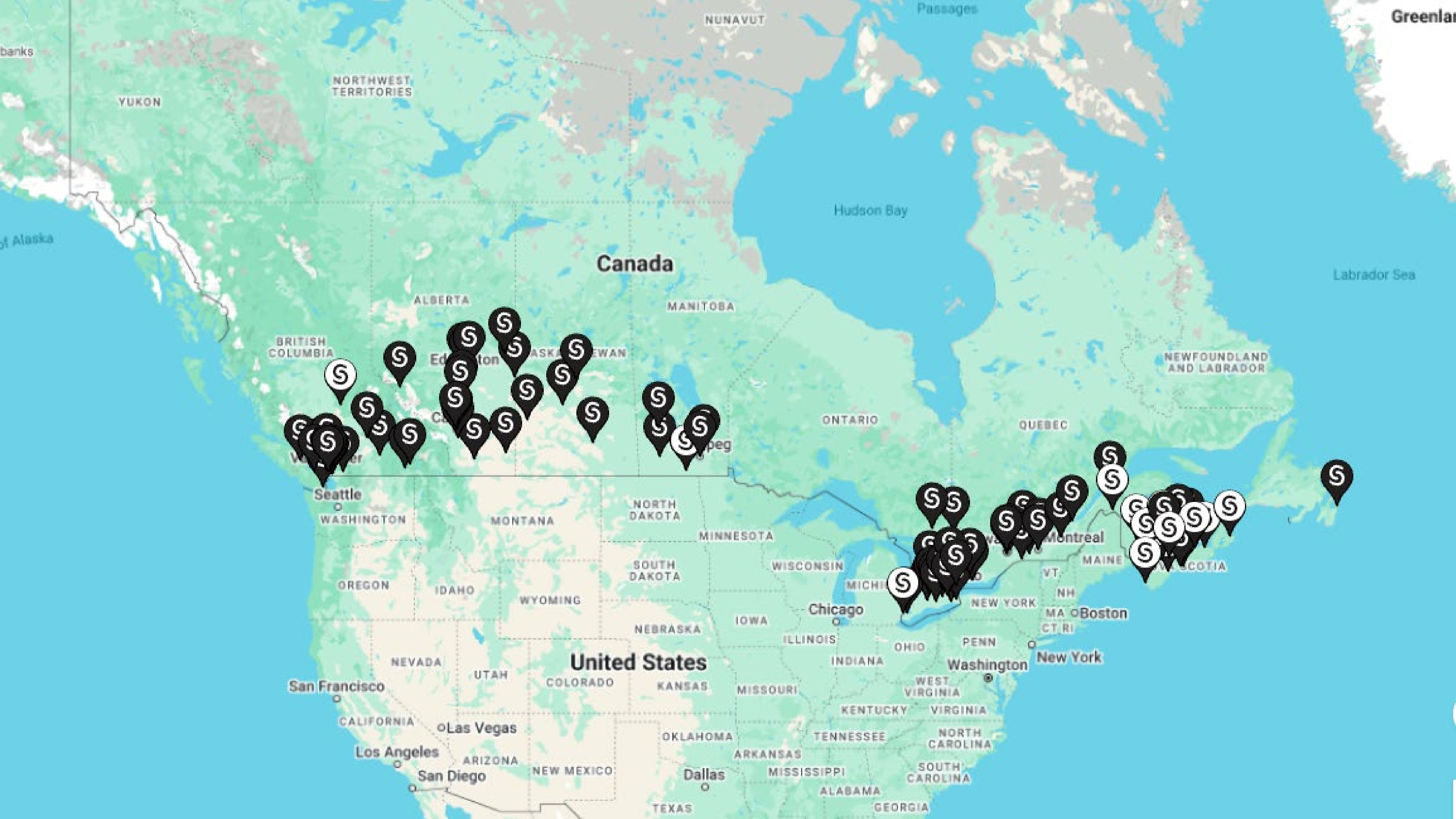
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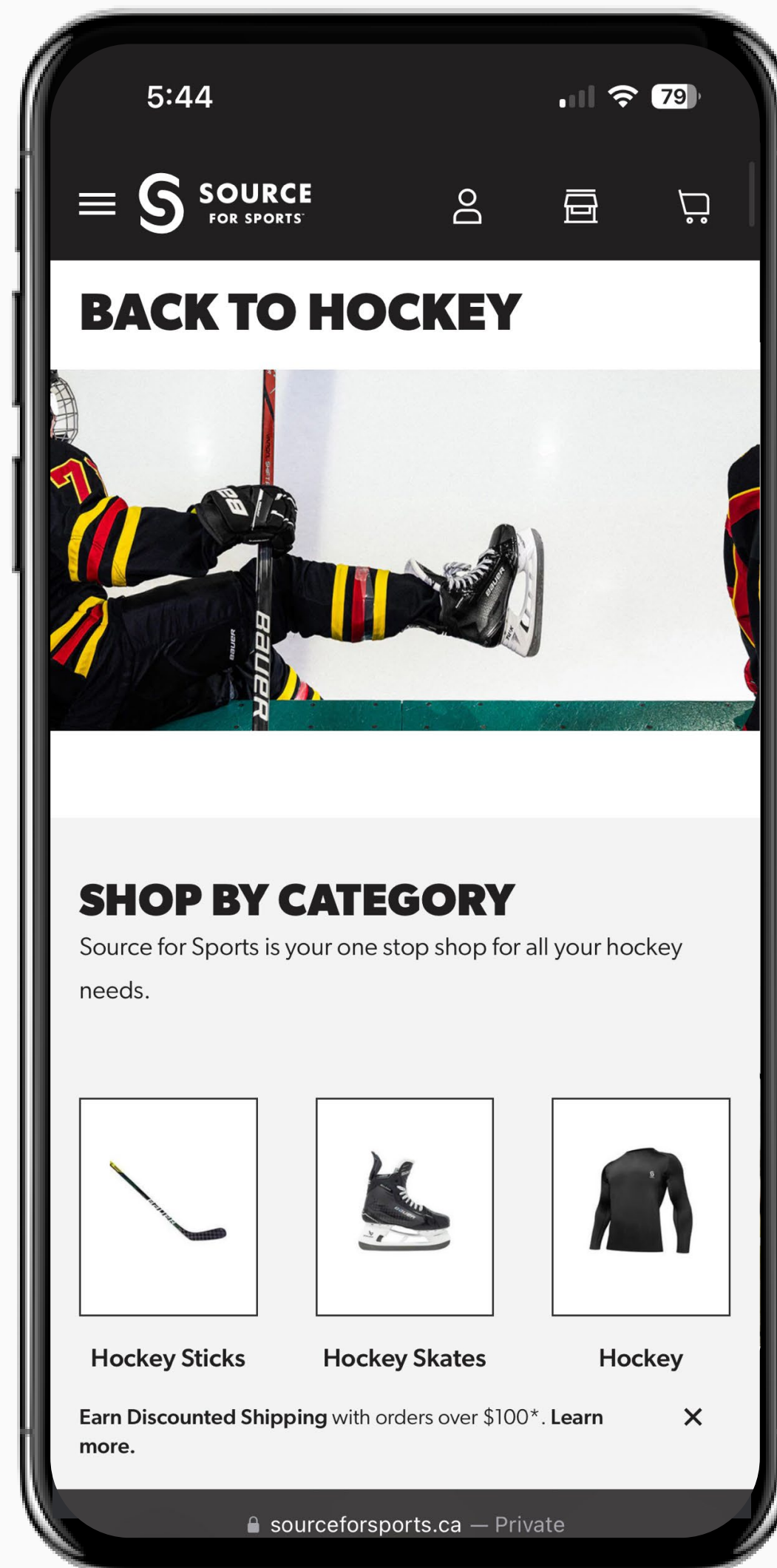
NATIONAL WEBSITE KEY FACTS

- Website launched with full e-commerce capabilities February 1, 2022.
- 101 stores across Canada fulfilling website orders .
- Customers shop for products online, see inventory at their closest store, and can ship to home or pick up in-store.
- Incredible year over year growth of website traffic and sales.

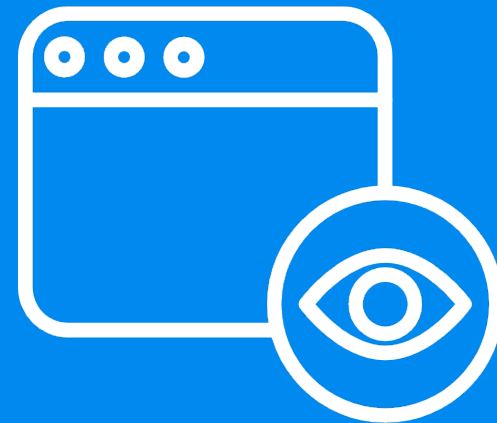




2024 WEBSITEST ATS



6.3M UNIQUE VISITORS
+9% YOY



23.2M PAGEVIEWS

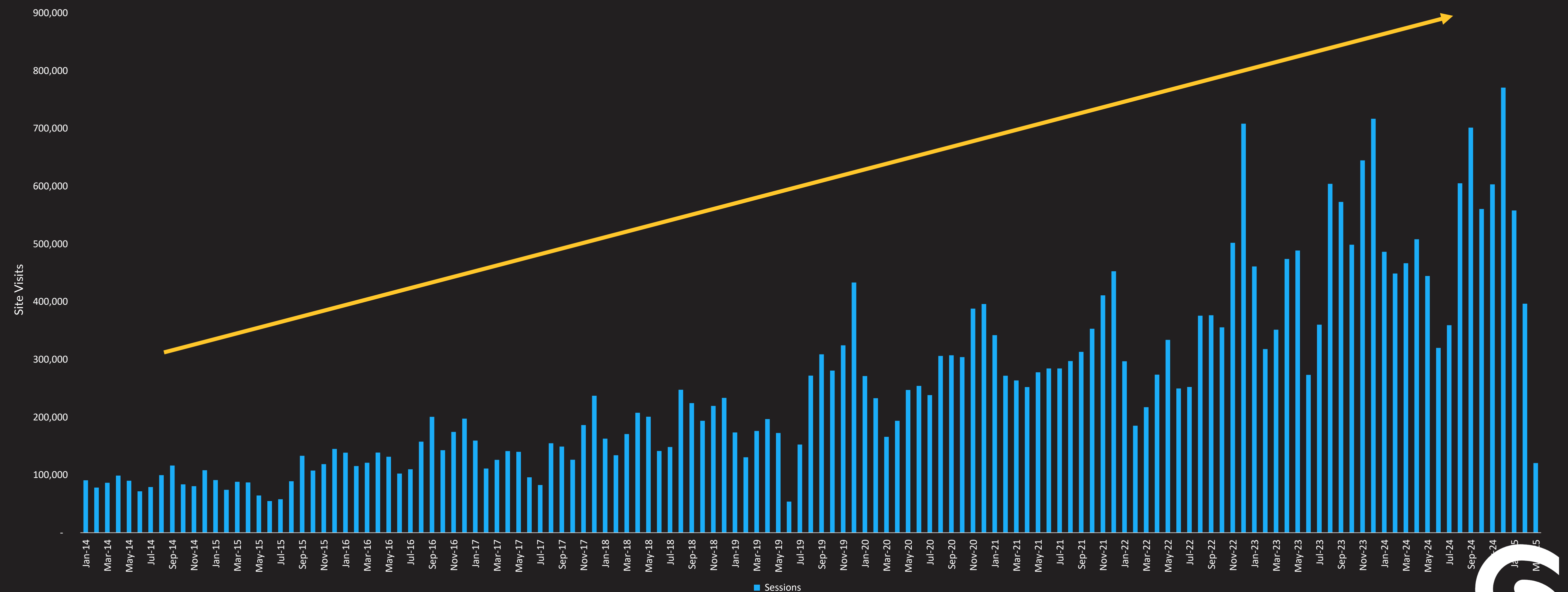


45K+ ONLINE ORDERS



\$196 AVG. CART SIZE

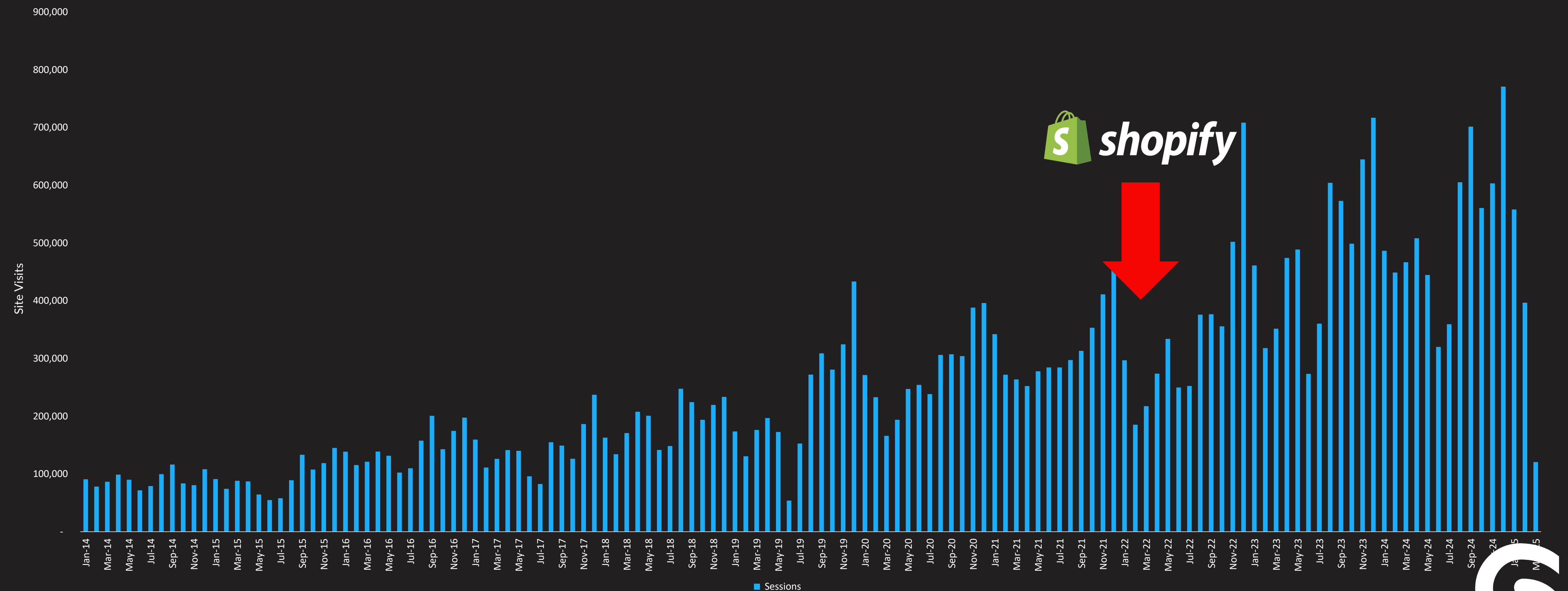
Long-term Site Traffic



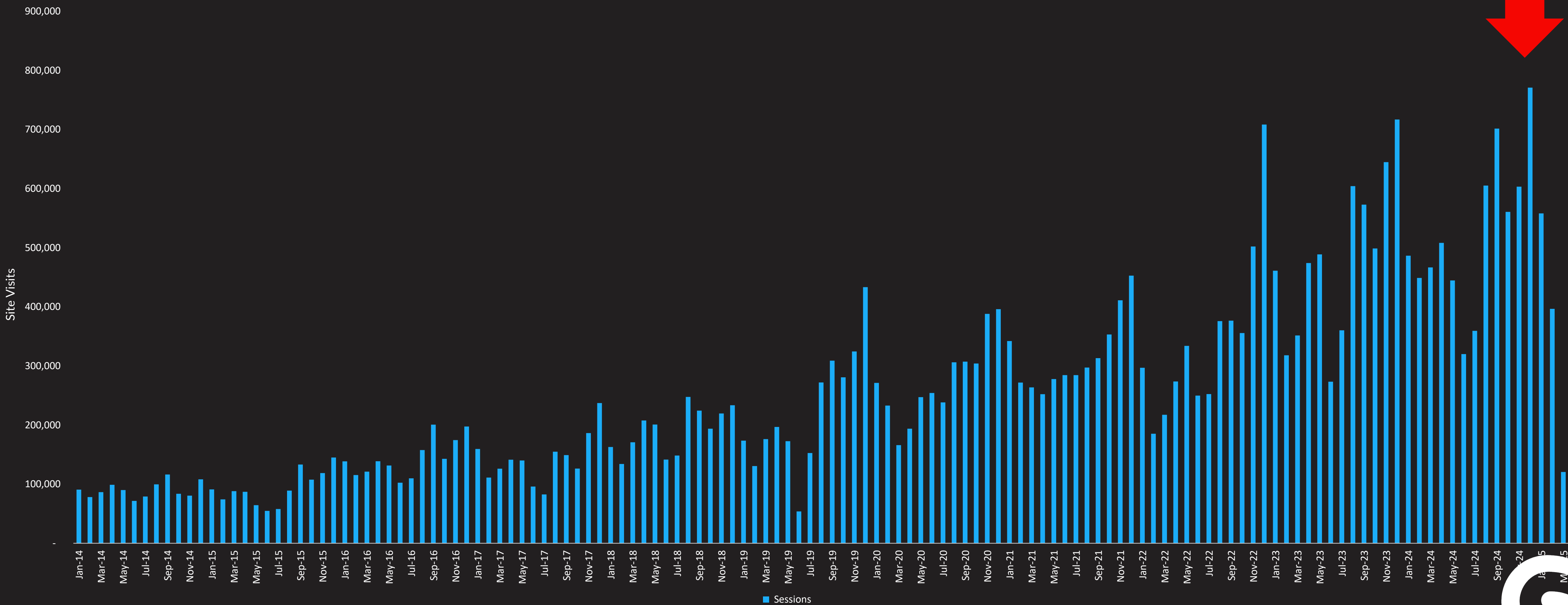
Data collected from Google Analytics.



Long-term Site Traffic



Long-term Site Traffic



Data collected from Google Analytics.