



2023 Unified Commerce Benchmark Industry Playbook

Sporting Goods and Outdoor



01

Market
Perspective

03

Capability Area
Deep Dives

02

Unified
Commerce
Benchmark

2023 Unified Commerce
Benchmark Industry Playbook:
Sporting Goods & Outdoor

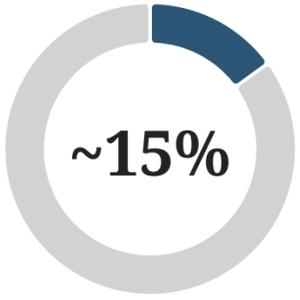
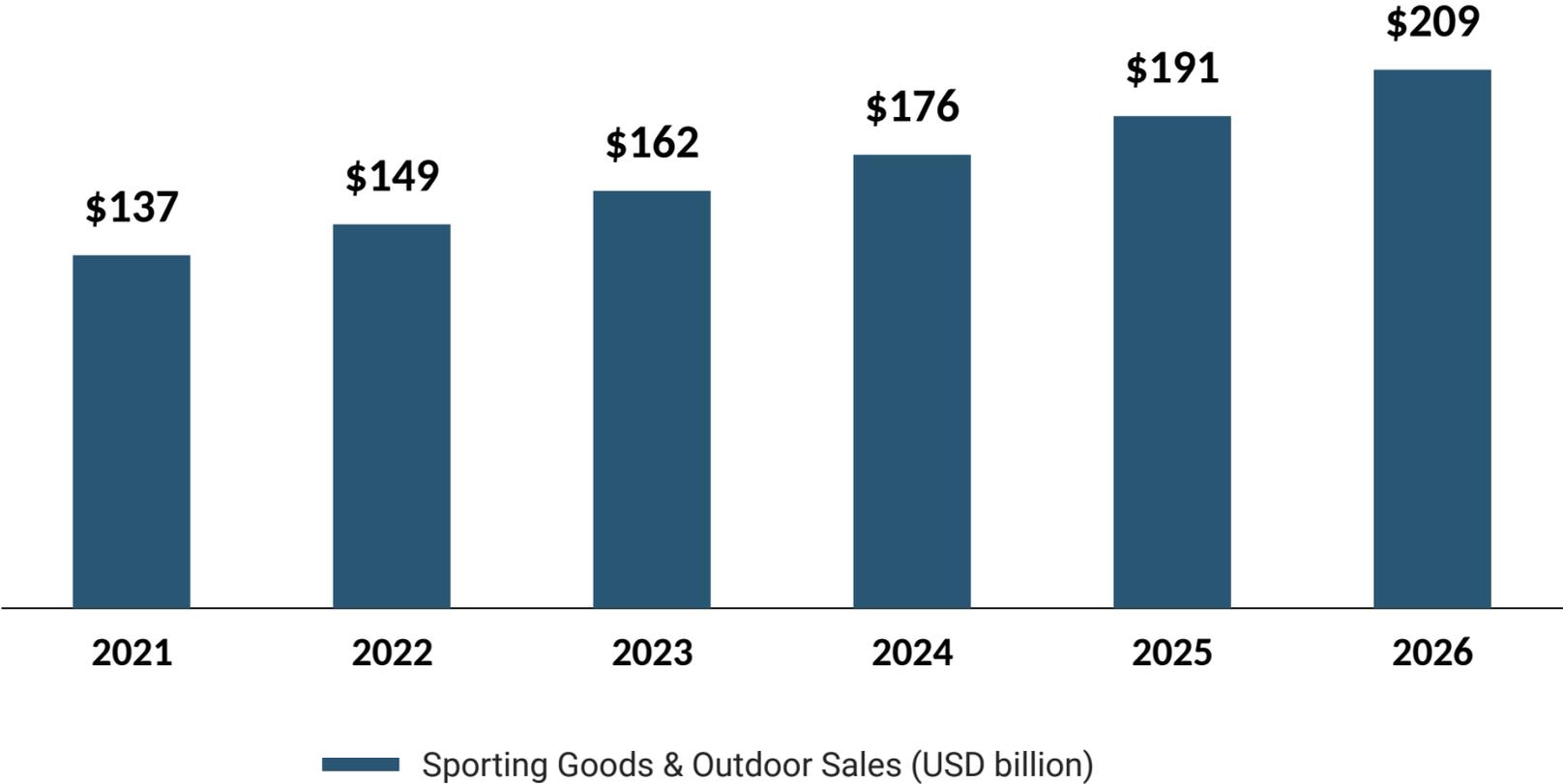
Market Perspective



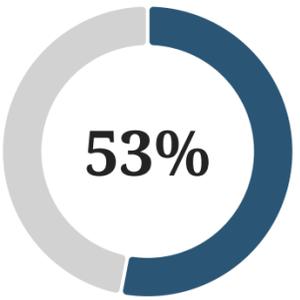
Market Perspective

Sporting Goods & Outdoor sales are projected to grow at a CAGR of ~8.9% from 2021-2026 to an overall market size of \$209 billion, from \$137 billion in 2021.

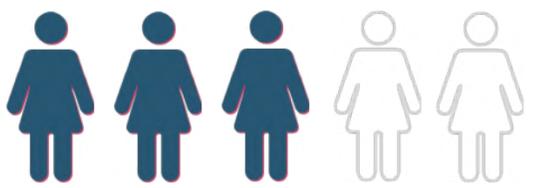
Sporting Goods & Outdoors retailers are making investments in shoring up digital capabilities across inventory management, sustainable practices, virtual immersive experiences, product customization and customer service



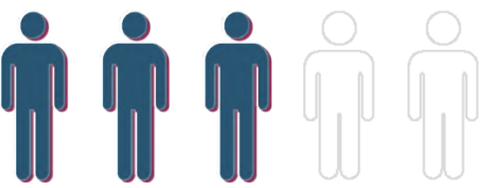
projected CAGR (2021-2026) for online Sporting Goods & Outdoor sales.



of shoppers are ready to pay more for customized Sporting Goods.



3 in 5 shoppers increased their spend on Sporting Goods in 2022 vs 2021.

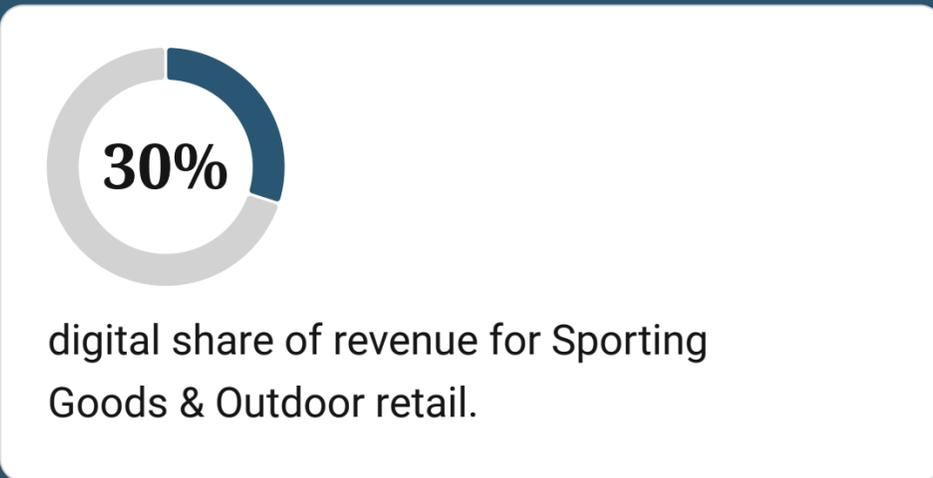
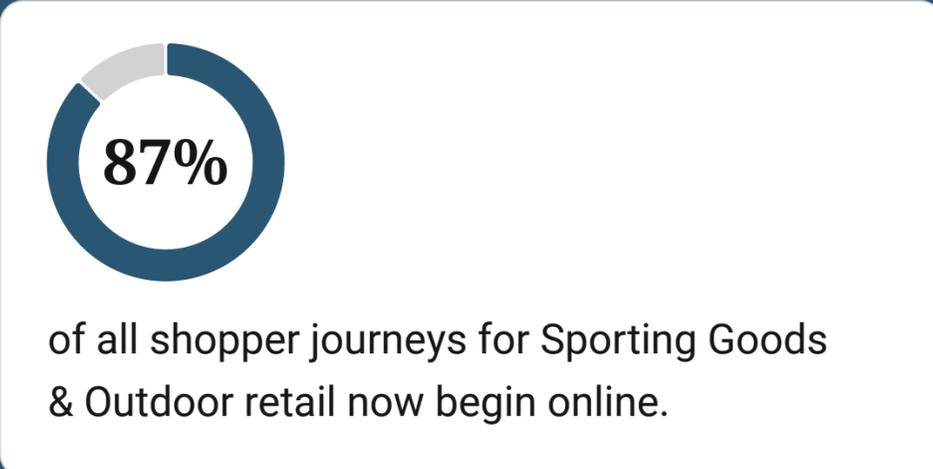
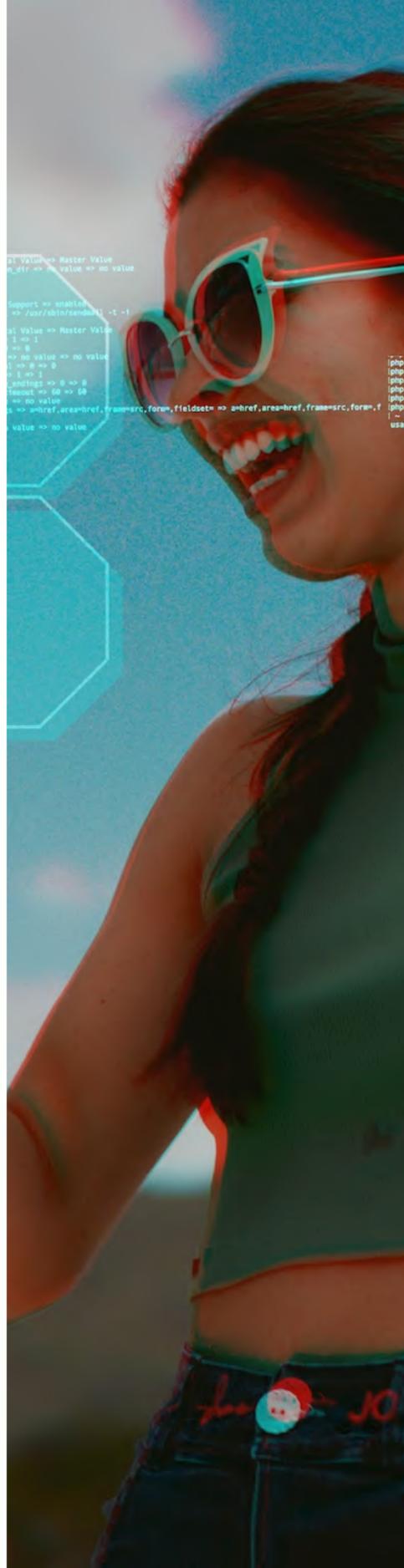


3 in 5 shoppers are willing to pay extra for sustainable, eco-friendly products.

Digital is default.

In the Sporting Goods & Outdoor segment, shoppers increasingly rely on digital platforms to research, compare, and purchase their gear and equipment. From virtual try-ons of hiking boots to detailed reviews of tents, the line between physical and digital has blurred, and shoppers expect seamless integration between the two worlds.

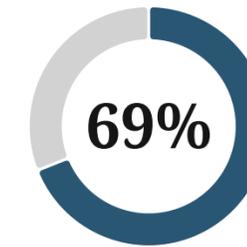
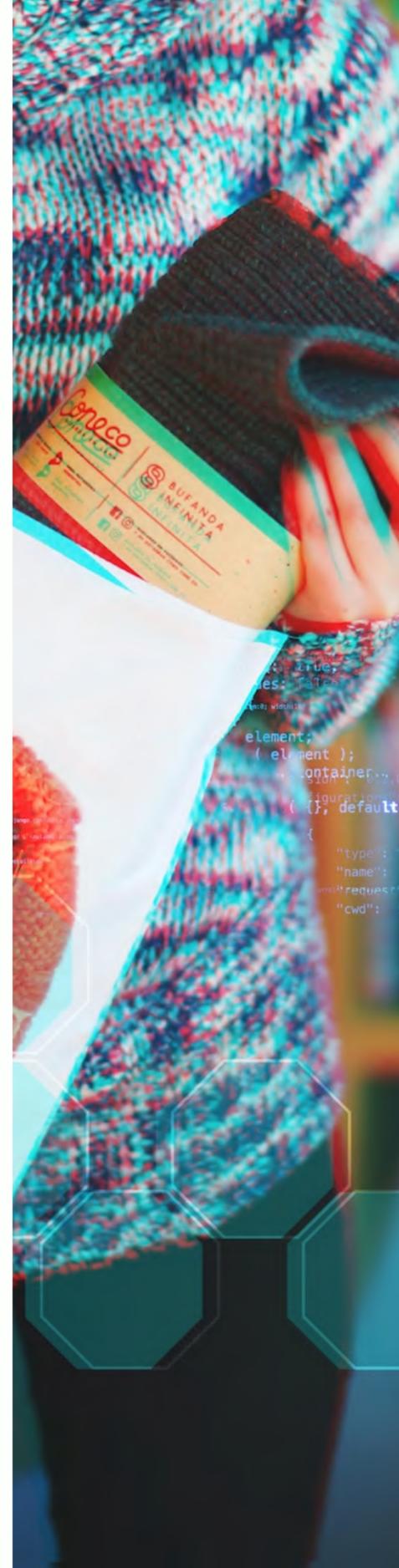
For instance, outdoor enthusiasts might want to research a new mountain bike online, test it in-store, and then make the purchase via a mobile app, all while receiving personalized recommendations for accessories and protective gear. Brands in this segment must seamlessly fuse digital and physical experiences to meet these evolving expectations.



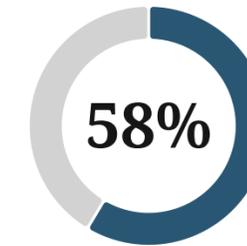
Convenience is a commodity.

In the age of hyper-convenience, Sporting Goods & Outdoor brands must go beyond just offering quick delivery and easy returns. They need to reshape shopper expectations by providing a diverse range of services that cater to outdoor enthusiasts' unique needs.

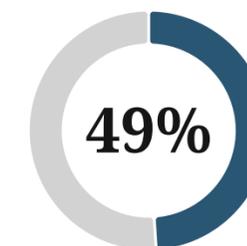
For example, shoppers might want the option to pick up their newly purchased camping gear at a location near their favorite trailhead, or have access to flexible financing options for expensive equipment. Focusing on delivering exceptional experiences will help Sporting Goods & Outdoor brands differentiate in a competitive market.



of shoppers value expedited delivery and are willing to pay a \$5 premium.



of shoppers will shop at another retailer if their desired product is out-of-stock.

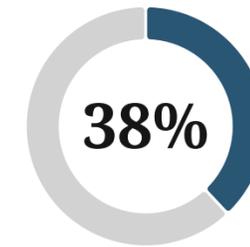


of shoppers prefer self-service options for order modifications and cancellations.

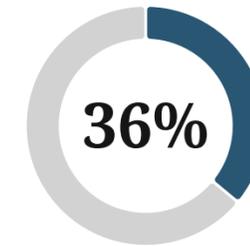
Virtue is a brand.

As the Sporting Goods & Outdoor segment caters to shoppers passionate about the environment and the outdoors, these shoppers expect brands to share their values and act responsibly. This extends from environmentally friendly materials and production processes to ethical treatment of workers and a commitment to social equity.

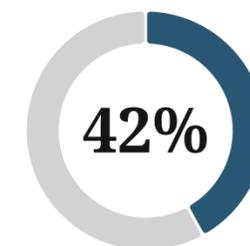
For instance, shoppers may prefer brands that offer gear made from recycled materials or support organizations dedicated to preserving natural habitats. By aligning with shoppers' value systems and being transparent about their practices, Sporting Goods & Outdoor brands can create lasting connections with their customers.



of retailers in this segment publish ESG scorecards and impact of fulfillment choices.



of shoppers are more likely to purchase a product with recyclable packaging.



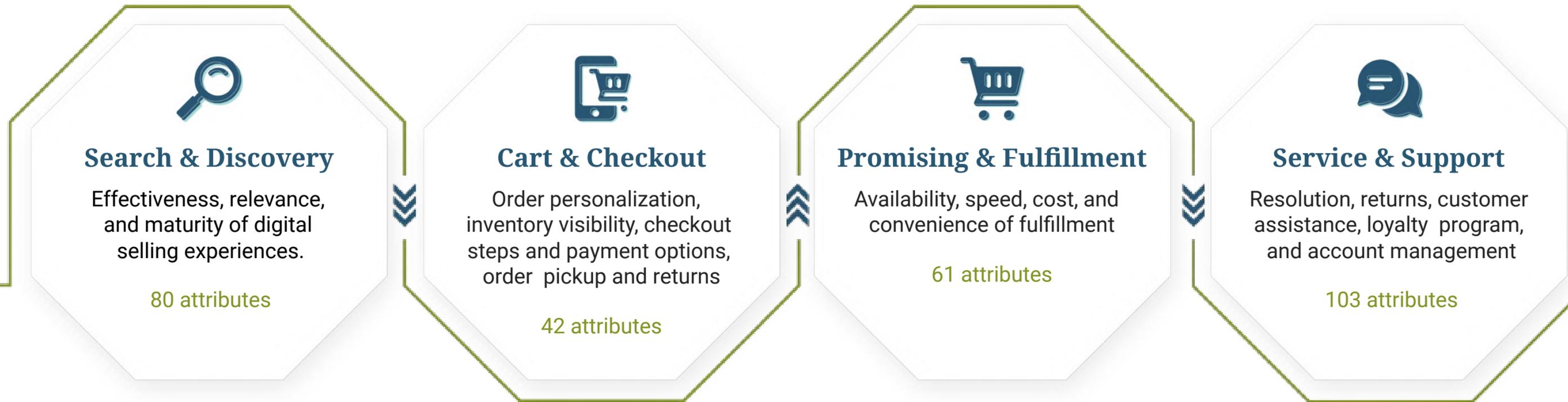
of shoppers are satisfied with their preferred retailers' sustainability practices.

2023 Unified Commerce
Benchmark Industry Playbook:
Sporting Goods & Outdoor

Unified Commerce Benchmark Overview



Incisiv's 2023 Unified Commerce Benchmark Index for Specialty Retail



This Industry Playbook is based on insights from the 2023 Unified Commerce Benchmark Index for Specialty Retail.

[Learn more about the Index here.](#)

124

retailers benchmarked across multiple specialty retail segments.

12

retailers chosen from the 124 for curated insights in industry segment specific Playbook.

280+

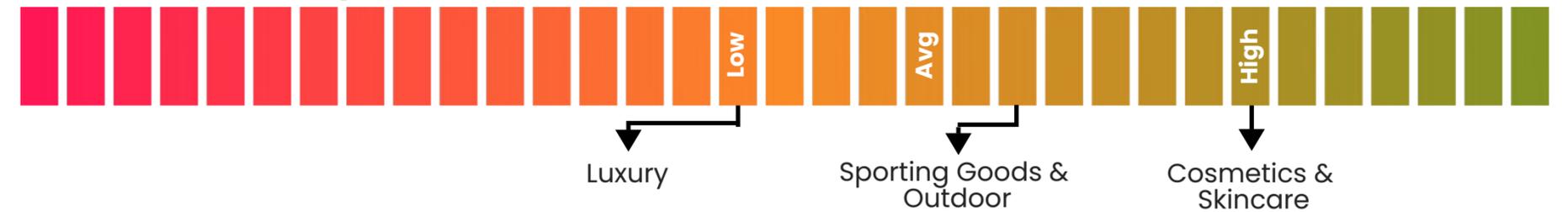
customer experience capabilities assessed in both, peer and industry segments

Industry Maturity

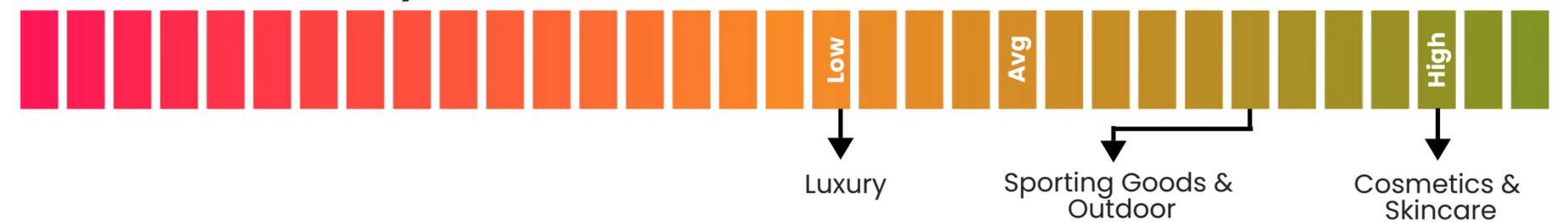
Sporting Goods & Outdoor demonstrates an above-average maturity in Unified Commerce, performing well compared to other industry segments. Key observations and recommendations include:

- **Build on strengths:** With strong performance in Promising & Fulfillment, and above-average maturity in Search & Discovery and Cart & Checkout, Sporting Goods & Outdoor brands should continue to invest in enhancing these areas, ensuring seamless and efficient experiences for shoppers.
- **Enhance Service & Support:** As this area aligns with industry average, improving customer service and support can help differentiate Sporting Goods & Outdoor brands from competitors, boosting customer loyalty and satisfaction.
- **Focus on digital-physical integration:** Continue to merge digital and physical channels, offering features such as virtual product trials or in-store pickup options to create a unified shopping experience that caters to the diverse needs of outdoor enthusiasts.

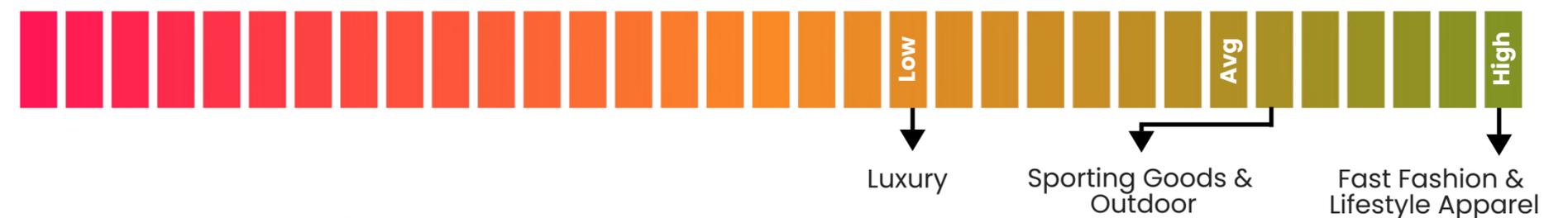
Overall maturity



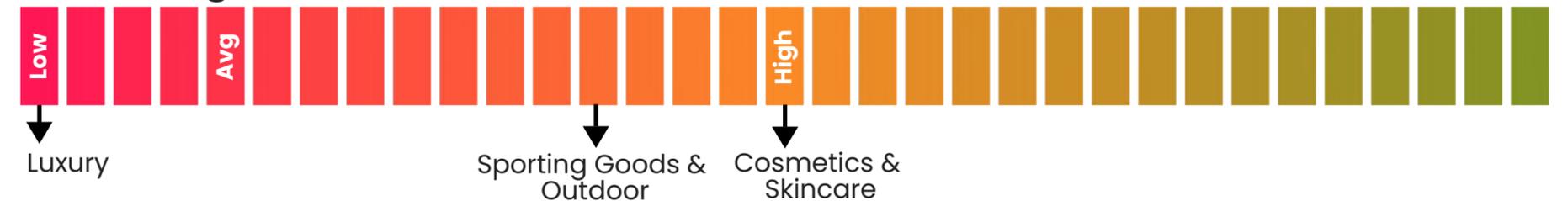
Search & Discovery



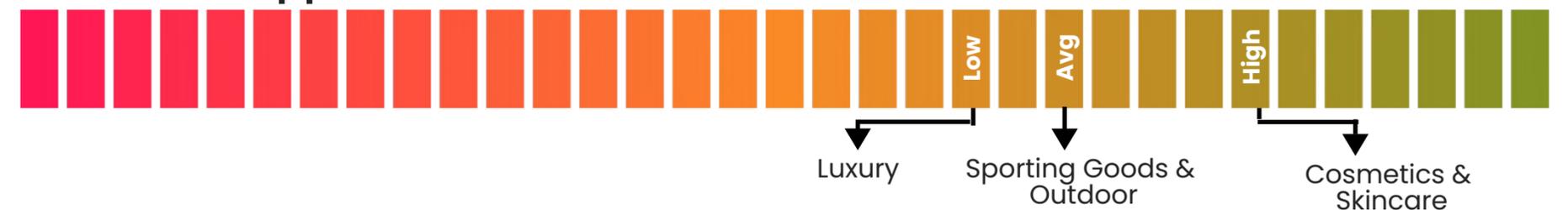
Cart & Checkout



Promising & Fulfillment



Service & Support





Sporting Goods & Outdoor Leaders

Incisiv recognizes these 4 Sporting Goods & Outdoor brands as Leaders in the 2023 Unified Commerce Index across all rating categories.

The Index includes a complete Leaderboard spanning 124 retailers across multiple specialty retail segments. Leaderboards are provided at both an overall and capability area level.

[Learn more.](#)

Sporting Goods & Outdoor Retailers Rated as Leaders, in Alphabetical Order

○ | SD | PF

CC

PF

○ | CC

○ = Overall
SD - Search & Discovery
CC - Cart & Checkout
PF = Promising & Fulfillment
SS = Service & Support

2023 Unified Commerce
Benchmark Industry Playbook:
Sporting Goods & Outdoor

Search & Discovery



Why it matters.

Search & Discovery refers to a set of retailer capabilities and experiences to provide personalized experiences to shoppers based on their intent. This includes curating a shopping experience that meets the shopper's needs, whether they are searching for a specific item, exploring a brand for the first time, or shopping for a particular occasion.

>80 of shoppers

use online channels to search for sporting goods and outdoor products

67% of shoppers

consider sustainability an important factor while purchasing sporting apparel online.

4.5% higher conversion rate

expected for products with 50 or more reviews.

What Leaders do well.

Leaders revolutionize the shopping experience by providing convenient filters for in-store availability, clear indicators for low stock or out-of-stock products, back-in-stock notifications, and personalized recommendations based on previous purchases.

Leaders



Nuanced and In-Depth Experience

Filters by in-store availability



Inventory status callouts for low stock/out-of-stock products



Option to opt for back-in stock notifications on PDP



Product recommendations based on past purchases

Non-Leaders



Standout capabilities.

Sporting Goods & Outdoor retailers empower shoppers to effortlessly navigate their websites, find desired items, and make informed purchasing decisions by incorporating filters for products, highlighting new arrivals and bestsellers, and providing enhanced inventory visibility.



Enhanced findability: Filter products by specific category



Advanced product visibility: Product demonstration videos on PDP



Detailed inventory visibility: Highlighting product availability and inventory status in product pages

Improvement opportunities.

Sporting Goods & Outdoor retailers can elevate the shopping experience by providing real-time visibility of their inventory, prominently featuring eco-friendly products, and offering advanced search capabilities with filters to streamline product discovery and management of out-of-stock items.



Endless aisle experience: Real-time inventory visibility



Sustainability initiatives : Highlighting eco-friendly products online



Advanced findability: Filters products by fulfillment method, hide/show out-of-stock products

Search & Discovery

Spotlight: Shopper Inspiration

Enhancing the customer experience and boosting conversions, brands recognize the importance of search and discovery on websites. They focus on improving website navigation through intuitive search functionality and user-friendly filters. By utilizing advanced algorithms, brands offer personalized product recommendations, while real-time inventory visibility ensures accurate information for customers. Moreover, successful brands go the extra mile by highlighting sustainable products, promoting eco-conscious choices to align with customer values. These efforts result in a seamless online shopping journey that drives customer satisfaction and loyalty.

Cabela's



Nalgene Sustain Wide-Mouth 32-oz. Water Bottle

PRODUCT DETAILS



Made of 50% recycled plastic destined for landfills, the Nalgene® Sustain Wide-Mouth 32-oz. Water Bottle is part of a sustainable, eco-friendly line of products with the durable long-lasting quality you expect from Nalgene. This bottle's high performance, leakproof construction is built to last and BPA/BPS free. Its easy-to-use wide-mouth design is convenient for ice

Highlighting sustainable product options

As the demand for sustainable products and manufacturing practices is increasing, retailers are focusing on highlighting sustainable products and detailing product impacts throughout their digital channels.

Cabela's highlights sustainable products on the listings page and provides information about the environmental impact of each eco-friendly product.

Academy
SPORTS+OUTDOORS

Hide Out Of Stock

Delivery Method ^

Home Delivery

Free Pick Up

Free Pick Up Today

Perimeter

[Change Store Location](#)

Expansive search filters for a simplified product discovery experience.

Product filters allow shoppers to hone in on a specific category, sub-category, or item, enabling more efficient discovery. Expansive filtering options help boost conversion rates and improve overall revenue.

Academy Sports + Outdoors offers a wide range of filtering options, including fulfillment options and option to hide out-of-stock items in the product listings page.

Why it matters.

Cart & Checkout refers to the capabilities and experiences provided by retailers to help shoppers make positive purchase decisions. Retailers must ensure a seamless shopping experience, especially when shoppers switch between physical and digital channels.

35% higher conversion rate

when the checkout process is optimized and designed for increased efficiency

17% of shoppers

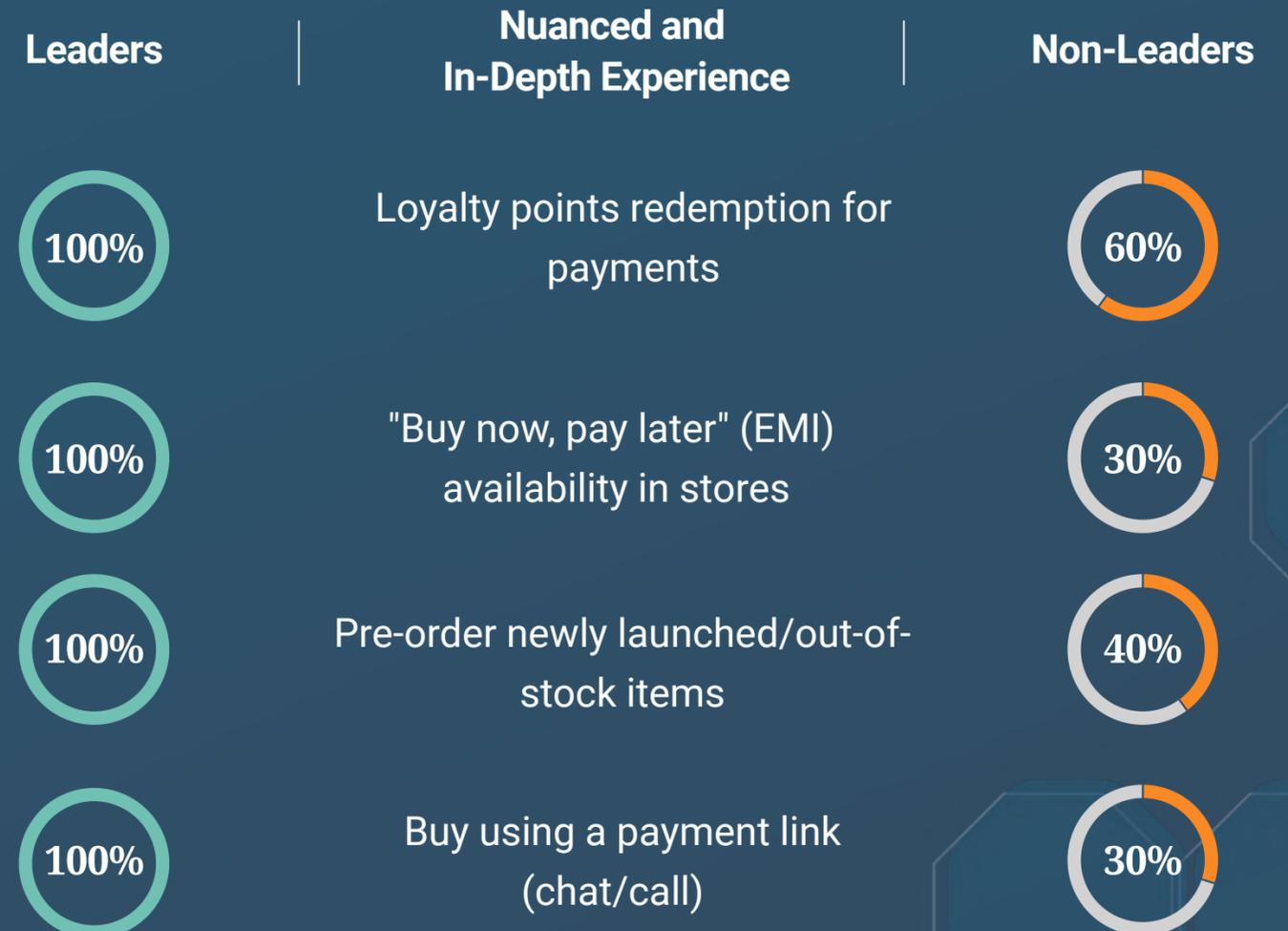
abandon their shopping cart if the checkout process is complicated

50% of shoppers

will not make a purchase if they are unable to use their preferred payment method

What Leaders do well.

Leaders excel in the cart and checkout process with features like loyalty points redemption, EMI payment integration, pre-order options, and payment link purchases. These enhancements make the shopping experience convenient and seamless for customers.



Standout capabilities.

For Sporting Goods & Outdoor retailers, the Cart and Checkout stage is a pivotal point in the online shopping journey. By incorporating key attributes such as promo code application, expedited checkout options, and loyalty points redemption, retailers can ensure a quick, convenient, and satisfying experience for customers.



88%

Expedited one-step and guest checkout options



75%

View and apply promo codes/coupons at checkout



92%

Ability to checkout using Apple Pay or PayPal

Improvement opportunities.

Sporting Goods & Outdoor retailers must seek ways to improve the checkout experience through innovative services like trade-in and recycling, expanded payment options, and detailed inventory visibility with substitute recommendations for out-of-stock items.



42%

Innovative new services and business models: Trade-in, recycle, pre-order etc.



25%

Expanded payment options: Combine multiple payment options/gift cards for the same order



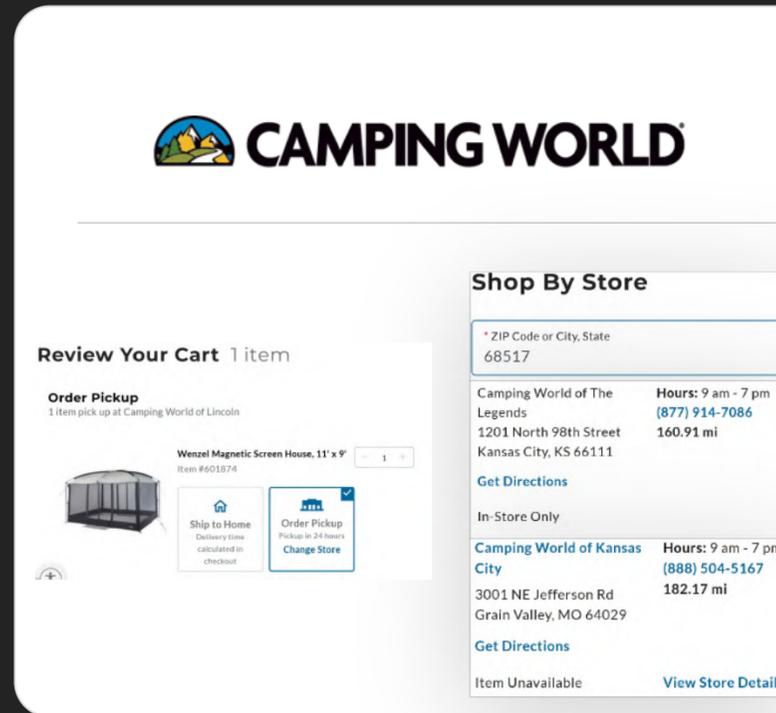
13%

Detailed inventory visibility: Highlighting inventory changes in the cart & substitute recommendations for out-of-stock items

Cart & Checkout

Spotlight: Seamless Checkout

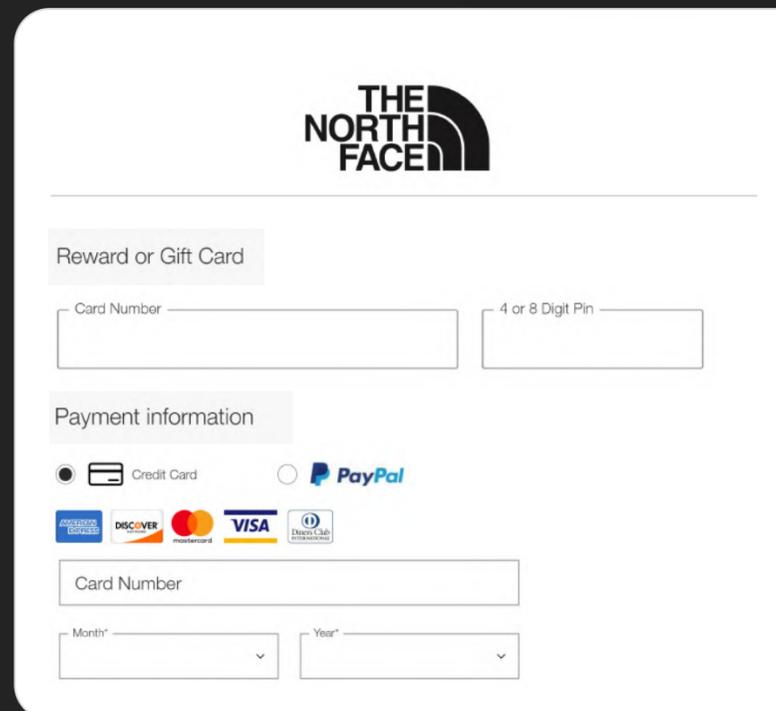
Brands are elevating the cart and checkout experience by incorporating inventory visibility, out-of-stock notifications, and pre-order capabilities. They encourage recycling during checkout and offer multiple payment options, including digital wallets and instalment plans. Streamlining the checkout process for faster transactions and ensuring security builds trust with customers. Additionally, providing visibility into past purchases further enhances the user experience.



Store inventory and past purchase visibility for a unified shopping experience.

50% of shoppers believe that retailers only personalize marketing messages and not the overall customer experience. A major obstacle in achieving a seamless personalized experience is the absence of a unified cart and profile that allows shoppers and store associates to carry context seamlessly from one channel to another.

Camping World unifies the shopping experience by providing store associates with access to comprehensive store inventory visibility and customer purchase history on a mobile device.



Multiple payment options for easier checkout

40% of shoppers express a preference for payment flexibility, which includes the option to utilize a combination of payment methods to complete an order. Having the ability to use multiple payment methods enhances the checkout process, leading to smoother transactions and increased customer satisfaction.

The North Face allows shoppers to use a combination of gift cards and credit cards/PayPal to pay for an order.

2023 Unified Commerce
Benchmark Industry Playbook:
Sporting Goods & Outdoor

Promising & Fulfillment



Promising & Fulfillment

Why it matters.

Promising & Fulfillment refers to the set of retailer capabilities and experiences that provide shoppers with convenient fulfillment options and precise order promising. Retailers should offer shoppers important ordering and delivery-related information throughout the shopping journey to improve shopper trust and increase the chances of conversion.

66% of shoppers

prefer sustainable shipping and packaging initiatives.

74% of shoppers

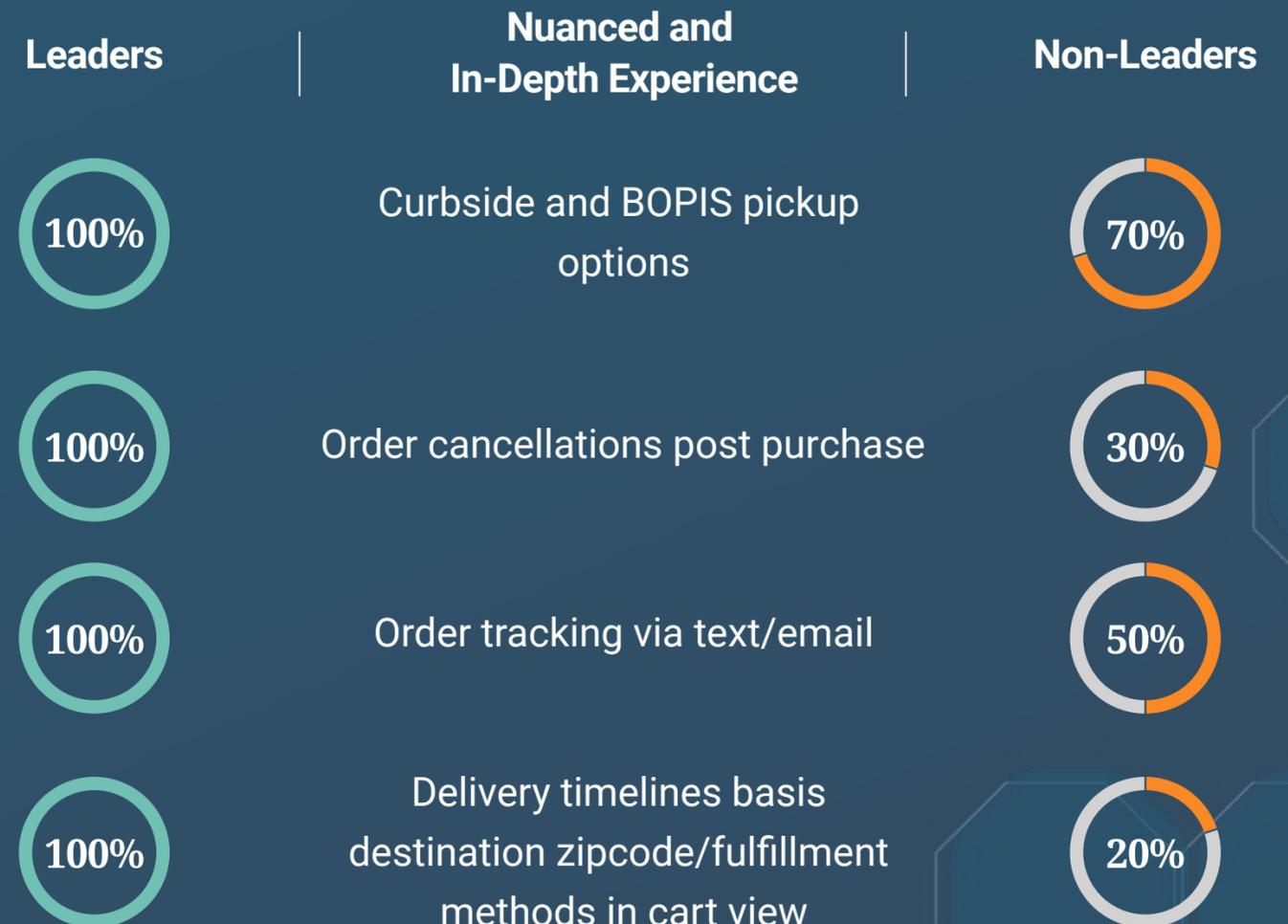
will abandon a purchase due to high delivery costs

54% of shoppers

say that delivery timelines affect their purchase decision

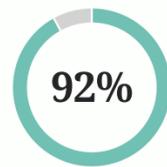
What Leaders do well.

Fulfillment leaders demonstrate excellence in streamlining the customer experience through a range of effective practices. These include offering convenient curbside and BOPIS pickup choices, allowing post-purchase order cancellations, providing order tracking via text or email, and presenting delivery timelines based on zip codes.

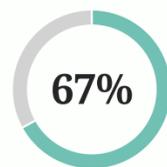


Standout capabilities.

Sporting Goods & Outdoor retailers are delivering a top-notch fulfillment experience with standout capabilities such as order visibility and tracking updates, sustainable product packaging, and curbside and store pickup options.



Order visibility: Status tracking and updates



Delivery Flexibility: Split Delivery options



Sustainable product packaging

Improvement opportunities.

However, Sporting Goods & Outdoor retailers can enhance several areas of fulfillment, including the implementation of product subscriptions, the adoption of sustainable initiatives, and the provision of post-purchase order modification options. By incorporating these improvements, retailers can offer shoppers a more convenient and environmentally conscious fulfillment experience.



Auto-replenishment Cycle : Product/Category subscriptions



Sustainable choices: Carbon footprint by delivery methods



Order modifications post-purchase

Spotlight: Flawless Fulfillment

Brands prioritize flexible fulfillment options, such as sustainable delivery choices and order modifications, to provide convenient and tailored experiences for customers. By offering services that allow customers to select their preferred order retrieval locations and integrating auto-replenishment through product subscriptions, brands ensure customers never run out of their favorite items. In addition, attractive incentives like free shipping are provided to enhance overall satisfaction. Retailers aim to save time, provide convenience, and deliver a seamless fulfillment experience for their customers.

Cabela's

PRODUCT SUBSCRIPTIONS

HOW TO SET UP YOUR SUBSCRIPTION



Subscription based models

Replenishment and replacement subscriptions for products boast an impressive conversion rate of 65%. Product subscription models offer shoppers a personalized and convenient shopping experience, allowing them to customize their preferences and receive products at scheduled intervals. This model not only provides value for money but has also gained significant popularity among shoppers.

Cabela's offers a subscription service that allows shoppers to receive recurring product deliveries at a frequency of their choice.

patagonia

Free Shipping on Orders Over \$99

Orders are shipped within 1-2 business days and arrive within 3-10 business days. Need it sooner? Concerned about the environmental impact? Flexible shipping options are available.

Shipping Information

We recommend the free Ground shipping (if applicable) or Standard shipping options whenever possible for the least environmental impact.

Sustainable delivery initiatives

57% of shoppers are willing to pay extra for environmentally friendly shipping options. By providing shoppers with the ability to view the environmental impact of their shipping decisions, brands can enhance brand trust and foster a sense of responsibility. This, in turn, leads to a positive impact on brand loyalty as customers appreciate the commitment to sustainability.

Patagonia mentions the most environmentally friendly delivery methods to help shoppers make informed decisions about their shipping choices.

Service & Support

Why it matters.

Service & Support pertains to the range of capabilities and experiences that offer customers personalized options to address any pre or post-purchase issues. Customers expect retailers to minimize the need for support, prioritize comprehensive self-service, but offer prompt and empathetic human assistance if needed.

57% of shoppers

prefer to repair or refurbish their fashion products rather than purchasing new ones.

62% of shoppers

expect a return/exchange within 30 days of making a purchase.

86% of shoppers

prefer online self-service options, such as chatbots, for support.

A lack of segment leadership.

While there are no Service & Support Leaders in the Sporting Goods & Outdoor segment, lessons can be learned from other segments - such as improved clienteling tools for store associates, the ability to track returns, and support via text messages.

Leaders In Other Segments



Nuanced and In-depth Experience

Store associates' ability to access shopper wishlists & lookbooks

In-store appointment scheduling

Return tracking capability

SMS based support

All Sporting Goods & Outdoor Retailers



Standout capabilities.

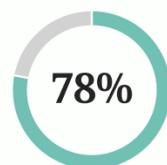
Sporting Goods & Outdoor retailers excel in providing exceptional customer support and convenience through support via multiple channels. Additionally, these retailers offer flexible return options, allowing customers to initiate returns or exchanges either online or in-store, and even drop off products at UPS or post office locations.



In-store assistance: Product availability and inventory details, product related information



Support via email, call, live chat and virtual assistant



Flexible returns: Initiate online returns/exchanges, drop off product at UPS or post office

Improvement opportunities.

Retailers have opportunities to improve their customer service by introducing service/maintenance subscriptions, offering personalized interactions with brand experts through scheduled appointments, and providing support through SMS and social media channels.



Service/Maintenance subscriptions



Scheduling personalized interactions with brand experts



SMS/Social media based support

Service & Support

Spotlight: Comprehensive Service

Retailers are embracing various channels to assist their customers effectively. They are leveraging social media platforms, live chat, and SMS support to provide timely and personalized assistance.

Furthermore, leading retailers in the industry are taking customer support to the next level by enabling audio/video virtual interactions, allowing customers to engage in detailed discussions about products, seek guidance on usage, fitting guides, and receive valuable tips. Other emerging customer support trends include self-service options, chatbot integration, and 24/7 availability. By embracing these trends, retailers can deliver exceptional service experiences that cater to individual customer needs.

patagonia

Contact Us

Engage

Reach out to us through your favorite social channels.

Our reps are available to respond and answer questions weekdays from 6AM to 6PM (PT).



Customer support via social media platforms

A significant majority, 64% of shoppers, express a preference for messaging a brand rather than calling for support. Social media platforms serve as valuable tools for retailers to personalize their interactions with shoppers and offer a convenient option for those seeking prompt responses to their inquiries.

Patagonia offers product information, exchange, repair and order related assistance via social media platforms.



Virtual Club Advisor

Receive expert advice from the comfort of your home with one of our Trusted Advisors.

SCHEDULE NOW

SCHEDULE A VIRTUAL CONSULTATION

Your complimentary session will be a 45-minute, one-on-one consultation. Choose a date and time that works best for you, with evenings and weekends available.

45 Minute Virtual Session: Drivers, Irons, or Complete Sets
You know you can get better. We know we can help.

Need help finding the right clubs for your game? You can get expert advice from the comfort of your home with our Virtual Club Advisor. During your complimentary session, one of our trusted...

⌚ 45 minutes

Book Now

Personalized interactions with experts

From receiving personalized tailoring services to scheduling styling appointments, shoppers can directly connect with store teams for issue resolution. These appointments can also be used to place orders and make payments on the phone, and have the order delivered to home or picked up in-store.

Dick's Sporting Goods offers pre-recorded consultations with experts for assistance in selecting golf clubs based on factors such as size and usage

Segment Dashboard

Category	Segment Maturity
Overall	Above Average
Search & Discovery	Near Highest
Cart & Checkout	Above Average
Promising & Fulfillment	Near Highest
Service & Support	Average

Retailer	Leader In
Academy Sports + Outdoors	O SD PF
Camping World	CC
Dicks Sporting Goods	PF
REI	O CC

Standout Capabilities

- Enhanced findability: filter products by specific category (SD)
- Advanced product visibility: Product demonstration videos on PDP (SD)
- Detailed inventory visibility: Highlighting product availability and inventory status in product pages (SD)
- Expedited one-step and guest checkout options (CC)
- View and apply promo codes/coupons at checkout (CC)
- Ability to checkout using Apple Pay or PayPal (CC)
- Order visibility: Status tracking and updates (PF)
- Sustainable product packaging (PF)
- Delivery Flexibility: Split Delivery options (PF)
- Support via email, call, virtual assistant, and live chat (SS)
- Flexible returns: Initiate online returns/exchanges, drop off the product at UPS or post office (SS)
- In-store assistance: Product availability and inventory details, product related information (SS)

Improvement Opportunities:

- Endless aisle experience: Real-time inventory visibility (SD)
- Sustainability initiatives : Highlighting eco-friendly products online (SD)
- Advanced findability: Filters products by fulfillment method, hide/show out-of-stock products (SD)
- Innovative new services and business models: Trade-in, recycle, pre-order etc. (CC)
- Detailed inventory visibility: Highlighting inventory changes in the cart & substitute recommendations for out-of-stock items (CC)
- Expanded payment options: Combine multiple payment options/gift cards for the same order (CC)
- Ordering flexibility: modification post confirmation (PF)
- Auto-replenishment Cycle : Product/Category subscriptions (PF)
- Sustainable choices: Carbon footprint by delivery methods (PF)
- Support via SMS or social media handle (SS)
- Personalized interactions with brand experts (SS)
- Service/Maintenance subscriptions (SS)

O = Overall | SD - Search & Discovery | CC - Cart & Checkout | PF = Promising & Fulfillment | SS = Service & Support

Dive Deeper with the 2023 Unified Commerce Benchmark for Specialty Retail

For a comprehensive analysis of unified commerce across all specialty retail segments, don't miss the "2023 Benchmark: Unified Commerce for Specialty Retail". Gain valuable insights, best practices, and in-depth case studies from industry leaders beyond your immediate peer group.

Elevate your brand's customer experience and stay ahead of the curve with the full benchmark report.

↓ | [DOWNLOAD](#)





Incisiv is a peer-to-peer executive network and industry insights firm for consumer industry executives navigating digital disruption.

Incisiv offers curated executive learning, digital maturity benchmarks, and prescriptive transformation insights to clients across the consumer and technology industry spectrum.

[incisiv.com](https://www.incisiv.com)



Google Cloud is widely recognized as a global leader in delivering a secure, open, intelligent and transformative enterprise cloud platform. Customers across more than 150 countries trust Google Cloud's simply engineered set of tools and unparalleled technology to modernize their computing environment for today's digital world.

cloud.google.com



Manhattan is a technology leader focused on improving experiences and outcomes in supply chain commerce. We provide leading software solutions for omnichannel commerce, supply chain planning and supply chain execution. Our cloud-native Manhattan Active® platform technology and unmatched industry experience help increase top-line growth and bottom-line efficiency for the world's leading brands.

Manhattan designs, builds and delivers innovative solutions for stores, transportation networks and fulfillment centers, eliminating silos created by legacy commerce, warehouse, and transportation systems to create seamless operations and optimal efficiency.

[manh.com](https://www.manh.com)



A global leader respected for innovation and reliability, Zebra offers technologies that give a virtual voice to an organization's assets, people and transactions, enabling organizations to unlock greater business value. The company's extensive portfolio of marking and printing technologies, including RFID and real-time location solutions, illuminates mission-critical information to help customers take smarter business actions.

[zebra.com](https://www.zebra.com)