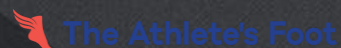


# Accent Group

## Analyst and Investor Field Day

25 March 2021



# ACCENT GROUP INTRODUCTORY VIDEO





**Introduction and Overview – Group CEO, Daniel Agostinelli**

**Retail - Group GM Retail, Matt Hapgood**

**Digital & Loyalty – Group GM Digital, Kasie Heathcote**

**The Athlete's Foot & Stylerunner – Group GM Accent Performance, Steve Cohen**

**Questions**

**Support office and store tour**

# Agenda

# **GROUP CEO**

# **DANIEL AGOSTINELLI**



# THE TEAM

**MATTHEW DURBIN**  
CFO

**MATT HAPGOOD**  
RETAIL

**BEN HAPGOOD**  
WHOLESALE

**STEVE COHEN**  
ACCENT PERFORMANCE

**TIM GREENSTEIN**  
IT & SUPPLY CHAIN

**MARIO PAOLUCCI**  
STORE DEVELOPMENT

**ARMANDO PEDRUCCO**  
RETAIL OPERATIONS

**MARTIN HOURIGAN**  
PIVOT, THE TRYBE & COMMERCIAL

**JENNIFER MYERS**  
RETAIL PLANNING

**KASIE HEATHCOTE**  
DIGITAL

**RYAN EDELMUTH**  
STYLERUNNER

**DEENA COLMAN**  
MARKETING BRANDS & THE ATHLETE'S FOOT



# 90 NEW STORES

## TO OPEN FY21

ersons only





# VIP

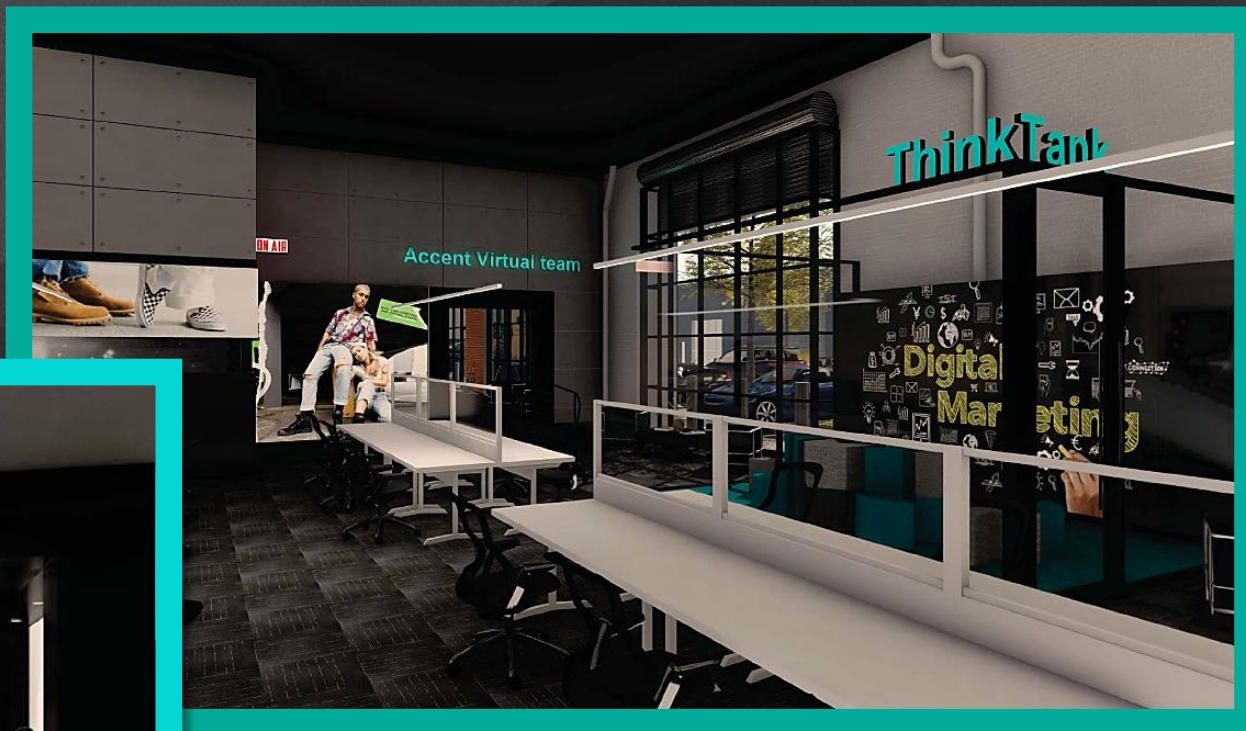
7.8 MILLION CUSTOMERS → 10 MILLION CUSTOMERS

SIGNIFICANT ONGOING FOCUS ON CUSTOMER EMAIL SIGN UPS

LOYALTY PROGRAMS TO ROLL OUT ACROSS ALL BANNERS OVER THE NEXT 18 MONTHS

SIGNIFICANT INVESTMENT UNDERWAY IN CUSTOMER DATA

# VIRTUAL



Accent Virtual team





# VERTICAL

I—T—N—O



RILEY



This comes in Kids & Adults options with **THREE Width** options (C, D, E)

LENNOX



Three widths offered in a Adults only style (C, D, E)



## STYLERUNNER





- EXIE BRAND ACQUIRED FROM CHRISTINA EXIE IN LATE JANUARY 2021, IS A TOP SELLING BRAND IN STYLERUNNER. CHRISTINA HAS JOINED ACCENT TO DRIVE EXIE FORWARD.
- FORWARD STRATEGY; TO GROW EXIE AS A STAND ALONE BRAND, AS WELL AS FURTHER DEVELOPMENT IN STYLERUNNER.
- COMBINES STREET AND ACTIVE WITH A FOCUS ON SEAMLESS.



- A NEW ACCENT BRAND IN START-UP MODE, WILL LAUNCH IN (MAY/JUNE) 2021 IN STYLERUNNER & WITH A STAND ALONE BRAND WEBSITE

- STREET AND SPORTS LUXE INSPIRED

## Mindful Dept.





# OUR STRATEGY

- ANNOUNCING TODAY THE LAUNCH OF A NEW ACCENT OWNED FORMAT: 4 WORKERS
- SIGNIFICANT OPPORTUNITY TO CAPTURE SHARE IN A FAST GROWING MARKET SEGMENT
- DESIGNED TO APPEAL TO A BROAD CUSTOMER BASE INCLUDING NURSES, CHEFS, TRADIES AND OTHERS WHO WORK
- SHOPPING CENTRE BASED, STORE DESIGN ORIENTED TO APPEAL TO WOMEN
- FIRST STORE TO OPEN IN MAY



# PRODUCT STRATEGY





**4WORKERS**

SAFETY — COMFORT — STYLE

# STORE DESIGN



ersonal use only



# GROUP GM RETAIL

## MATT HAPGOOD

# AGENDA

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## ACCENT RETAIL:

- STORE NUMBERS
- DRIVING STORE INNOVATION
- LATEST STORE FITOUTS
- DRIVING TEAM CULTURE










# STORE PROJECTION COUNT

STORE

AT END OF FY20

AT END OF FY21

 The Athlete's Foot	145	144
<b>PLATYPUS</b> 	125	145
<b>SKECHERS</b>	112	133
 <b>HYPE</b>	71	79
<b>VANS</b>	24	28
<b>MERRELL</b>	16	16
 <b>TRYBE</b>	8	10
<b>Timberland</b> 	7	9
 <b>Dr. Martens</b>	6	13
<b>STYLERUNNER</b>	0	4
<b>SUBTYPE</b>	3	4
<b>PIVOT</b>	1	15
 <b>CAT</b>	1	3
<b>4WORKERS</b>	0	3

PLANNED STORES AT  
END OF FY21

609

# STORE INNOVATION

---

REFITTING STORES

DIGITAL SCREENS AND ACTIVATION IN STORES

EXCITE CUSTOMERS

LOYALTY PROGRAMS

CLICK & COLLECT

CLICK & DISPATCH

ENDLESS AISLE

VIRTUAL SALES (HERO)



# PLATYPUS JOONDALUP

ersonal use only





# HYPE BRIGHTON





# SKECHERS WORLD SQUARE





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# CULTURE

---



personal use only

"Make It Happen"

---

**OUR PEOPLE ARE OUR  
BIGGEST ASSET**

---



---

**OUR CUSTOMERS ARE THE  
MOST IMPORTANT PEOPLE  
IN THE BUSINESS**

---

M MAKING

A

G REAT

!

MPRESSION on our

C

USTOMERS



---

**HIRE ON ATTITUDE TRAIN  
ON EVERYTHING ELSE**

---

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# THE **FIRST** 3 FEET

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PLATYPUS



HYPE<sup>®</sup>  
DC





# GM DIGITAL KASIE HEATHCOTE



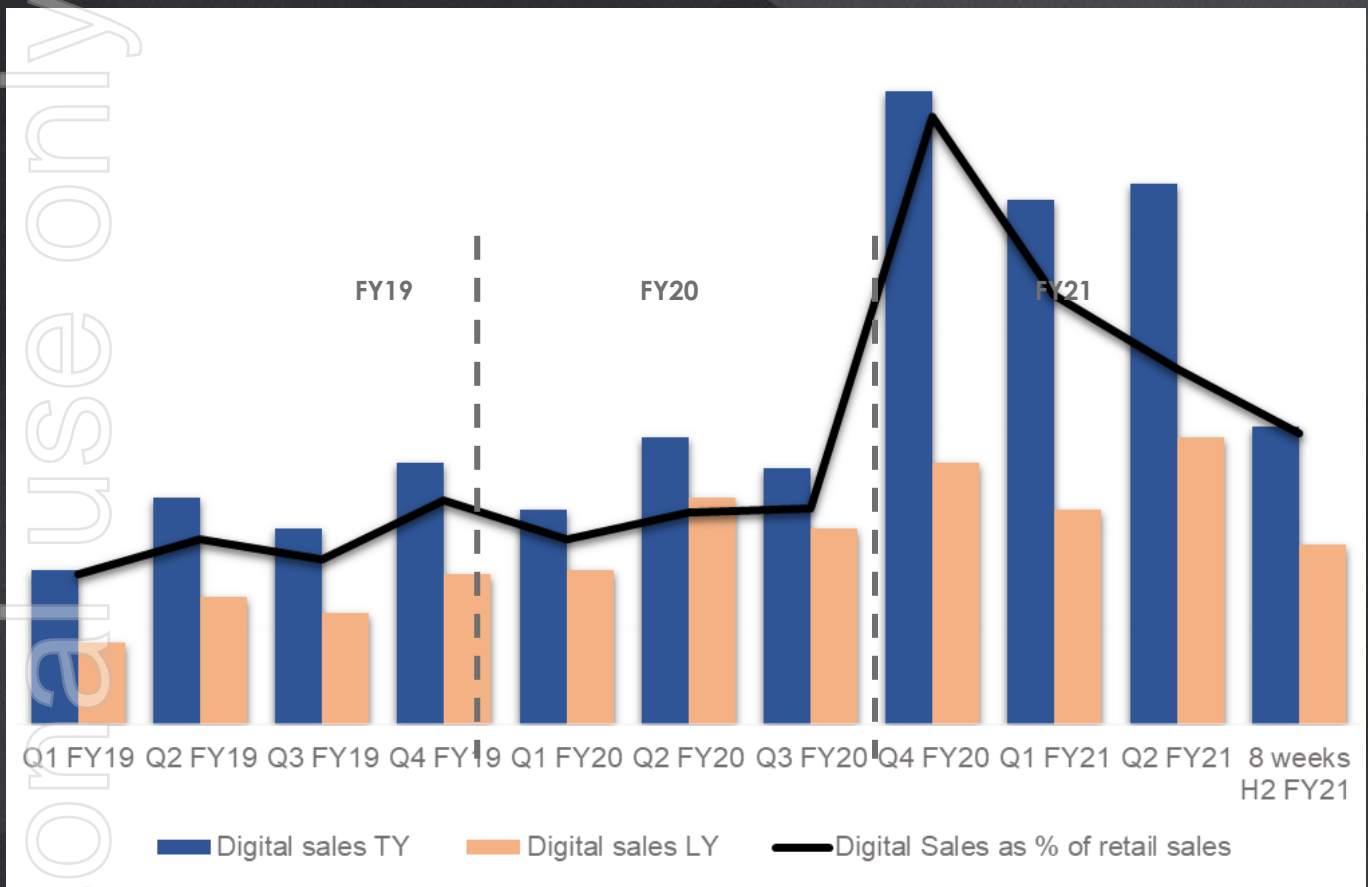
# AGENDA

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## DIGITAL:

- DIGITAL PERFORMANCE UPDATE
- DIGITAL TEAM OVERVIEW
- ECOMMERCE INVESTMENT PRIORITIES
- CUSTOMER DATA PLATFORM
- LOYALTY PROGRAMS

# DIGITAL SALES & KEY PERFORMANCE METRICS



	FY20 (July '19 – June '20)	Jul '20 - Dec '20	8 Weeks H1 FY21
Digital Sales	+65.6%	+109.6%	+65.4%
Website Sessions	+32.9%	+53.4%	+40.9%
Orders	+52.0%	+99.9%	+63.4%
Conversion Rate	+14.2%	+31.6%	+17.6%
Avg. Order Value	+0.1%	+8.0%	+4.9%
Digital as a % of Total Sales	17.1%	22.3%	17.0%

1: Percentages shown in the table represent growth on the same period last year



# Digital Team Overview

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## eCommerce

Trade and performance  
Site Management &  
Merchandising  
eCommerce Technology



## Customer & Insights

Customer Data & Insights  
Customer Relationship  
Management  
Loyalty

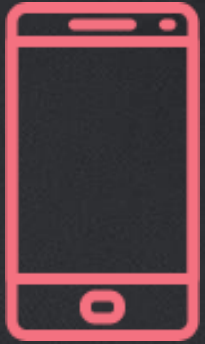


## Strategy & Growth

Digital & Performance  
Marketing  
Emerging Brands & Markets  
Omni-Channel & Virtual  
Sales

# Investment in eCommerce Technology

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Mobile First



Speed to  
Market



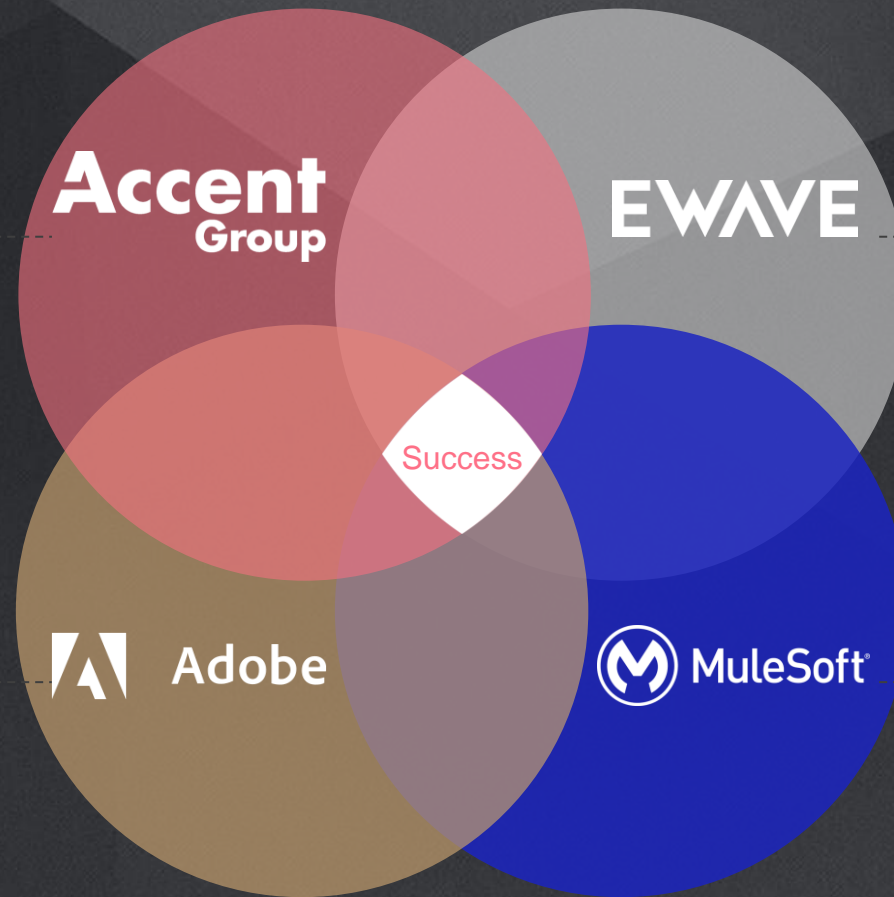
Site Performance



Improved  
Conversion Rates



# Partnership for Success



- Online Product
- Strategic Vision
- Merchandising
- Marketing

- Magento Commerce Product
- Adobe CX products
- Magento Cloud Product & Support

- Implementation & Solution Support
- Digital Commerce & Marketing Services
- Strategy, Design, Technology, Content Services
- Commerce Support

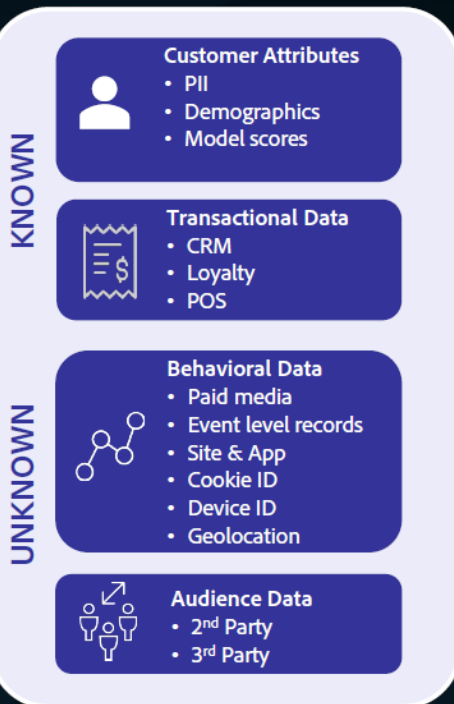
- Middleware product
- Implementation
- Support

# Customer Data Platform

Simplified collection, management, and activation of all customer data

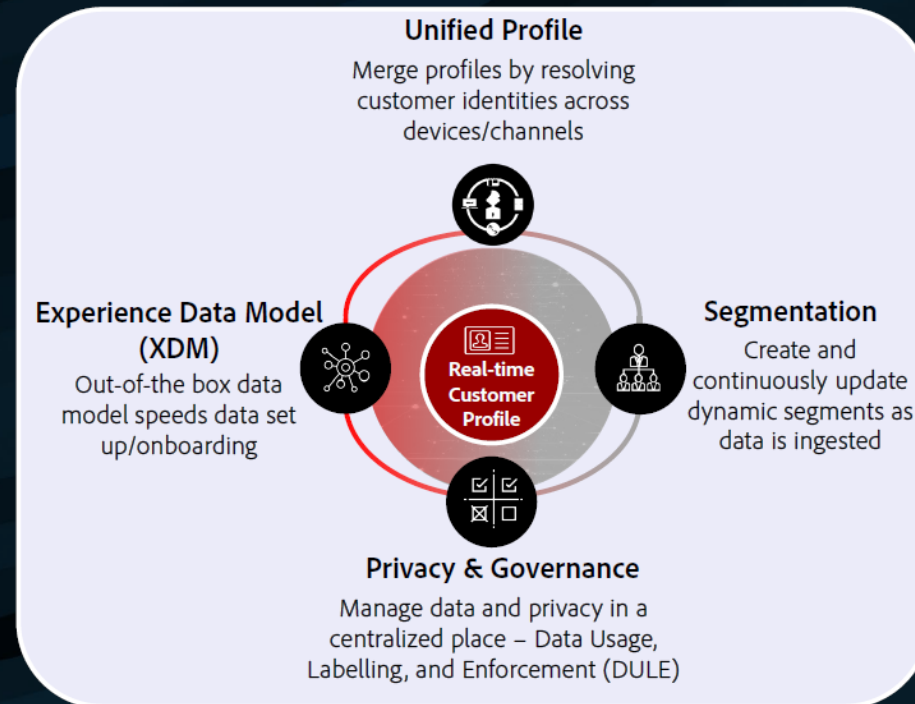
## INGEST CUSTOMER DATA

Collected at event-level, across devices & channels in real-time via API, SDK

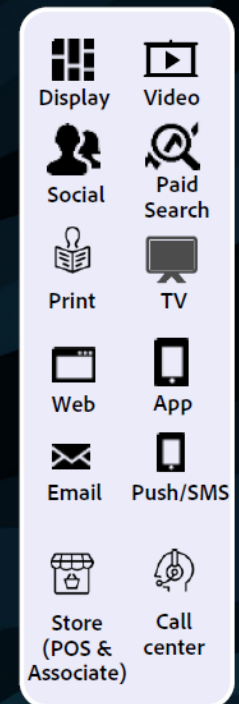


## STITCH, MANAGE & GOVERN

Profiles are created & updated in real time as data is ingested



## ACTIVATE





# Customer Loyalty

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## LIVE PROGRAMS

- The Athlete's Foot
- Merrell
- Skechers

## PROGRAMS IN DEVELOPMENT

- Hype DC
- Platypus Shoes
- 4 Workers

## MyFit Member Database Overview:



Total MyFit members

**3.3M+**



EDM Opt-In

**1M+**



SMS Opt-In

**1.7M+**

MyFit Members have contributed to

**78%**

of Total Business Sales  
FY21 to date

MyFit Members have a Repeat Purchase Rate of

**52%**

Over The Past 12 months

## DATA MEANS POWER

Analysis Period: Nov 2020 – March 2021

Value per MyFit Member  
who is Opt-in to 1+  
marketing Channels

**\$260**

Value per MyFit Member  
not Opt-In to any  
marketing

**\$212**

Each **MyFit Member** who is Opt-In to Marketing is  
**\$48 MORE valuable** to the business

## MyFit Member Vouchers Overview:

Analysis Period: Oct 2020 – March 2021



**386K**

Vouchers Issued in last 6  
Months



**185K**

Vouchers Redeemed in last 6  
Months



**48%**

Voucher redemption Rate



**\$100**

Average Order Value



**\$14.5m**

Net Sales



## Skechers Insider Database Overview:

*Launching on the 3rd of March 2021, the Skechers Insider loyalty program has delivered the following results 2 weeks into go-live:*



Total Insider Members

**188K**



NEW Customers

**22K**



EXISTING Customers

**166K**

## Skechers New Customer Sign Up Rate:

**AU**



Pre-Launch Average

Weekly sign up rate of new customers in-store

**27%**

Post-Launch Average

Weekly sign up rate of new customers in-store

**41%**

**NZ**



Pre-Launch Average

Weekly sign up rate of new customers in-store

**45%**

Post-Launch Average

Weekly sign up rate of new customers in-store

**58%**

# **GROUP GM ACCENT PERFORMANCE**

## **STEVE COHEN**



# AGENDA

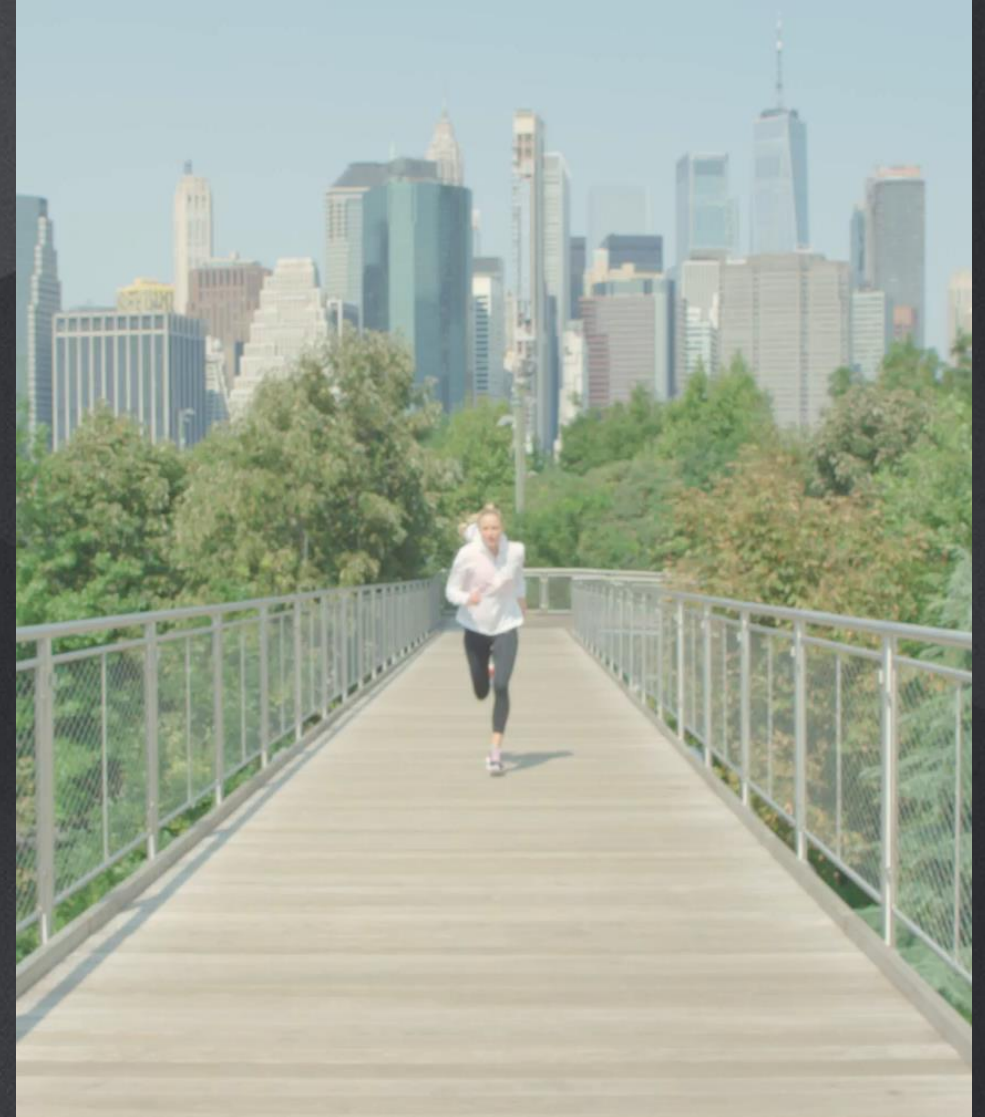
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## THE ATHLETE'S FOOT:

- CORPORATE STORES
- VERTICAL PRODUCT & DISTRIBUTED BRANDS
- MYFIT3D ECO-SYSTEM

## STYLERUNNER:

- STORE ROLLOUT PLAN
- VERTICAL PRODUCT - STYLERUNNER THE LABEL







THE ATHLETES FOOT  
DONCASTER, MELBOURNE



# THE ATHLETE'S FOOT: CORPORATE STORES

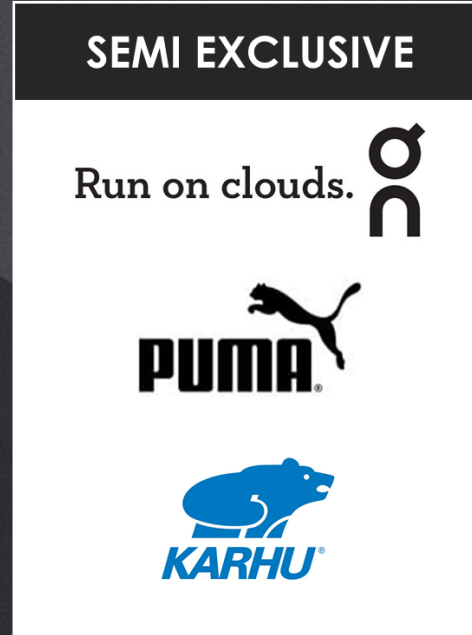
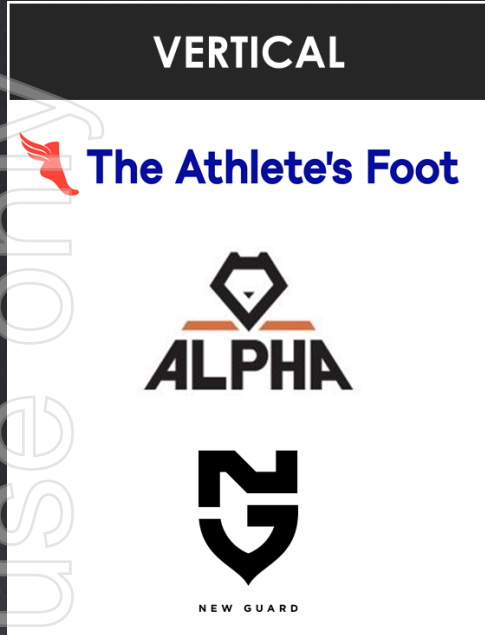
## CURRENT NETWORK STRUCTURE:

- TOTAL NETWORK 144 STORES ACROSS AUSTRALIA & NZ
- 44 ACQUIRED STORES HAVE BEEN STRONG SINCE TRANSITION WITH ROI >20% & IN LINE WITH EXPECTATIONS
- ACQUISITION OF FRANCHISE STORES HAS RECOMMENCED IN 2021 (WERRIBEE TRANSITION OCCURRED 16/03)
- ACQUISITION STRATEGY HAS BEEN COMPLEMENTED BY 9 NEW STORES ACROSS AUSTRALIA & NZ WITH AGREED TERMS ON AN ADDITIONAL 4 STORES TO BE TRADING BY DECEMBER

Period	Sales vs LY	GP %	GP% vs Pre-Acquisition
<b>FY21 YTD</b>	<b>23.3%</b>	<b>52.9%</b>	<b>+400bps</b>

SALES GROWTH & MARGIN CLIMB OF ACQUIRED STORES

# THE ATHLETE'S FOOT: VERTICAL PRODUCT & DISTRIBUTED BRANDS



PERIOD	OWNED
FY19	0.1%
FY20	1.2%
FY21 YTD	4.1%
FY21 Q3	7.9%

## ALPHA

- C. 20% OF BTS FORMAL SALES IN JAN 21 VS 6.5% IN JAN 20
- DISTRIBUTION OPEN TO FRANCHISEES IN JAN 22

## TAF BRAND

- 34% OF ACCESSORY SALES YTD
- 55% OF ACCESSORY SALES SINCE JAN 21
- DISTRIBUTION OPEN TO FRANCHISEES IN JUL 21

## SAUCONY

- YTD GROWTH C. 30%
- 54% INCREASE YOY SINCE JAN
- STRONG PIPELINE OF PRODUCT

## ON RUNNING

- ONE OF THE FASTEST GROWING RUNNING BRANDS GLOBALLY
- EXCLUSIVE PRODUCT ACROSS CATEGORIES WITHIN TAF & ACCENT



# THE ATHLETE'S FOOT: VERTICAL PRODUCT

ALPHA



CLEANING



INNERSOLES



SOCKS





MyFit  
**3D**

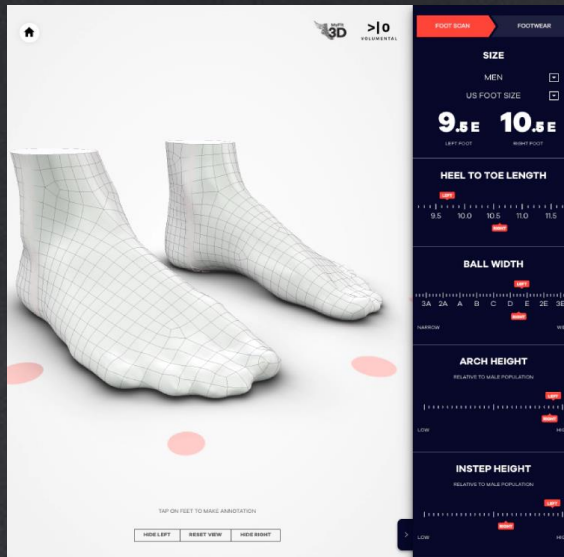
THE **FUTURE**



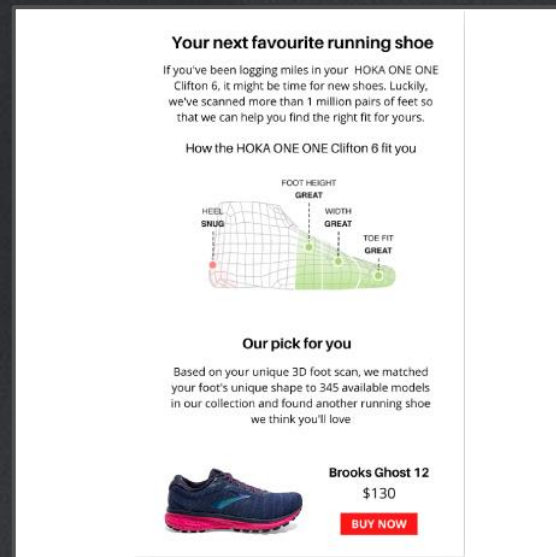
# THE ATHLETE'S FOOT: MYFIT

## BY THE NUMBERS:

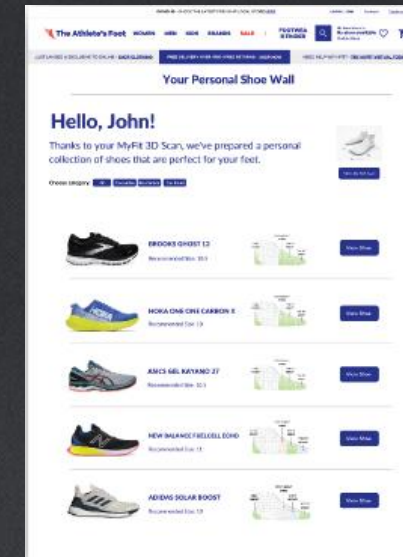
- 92% OF CUSTOMERS WHO PURCHASE EXPERIENCE MYFIT3D
- OVER 2M SCANS HAVE BEEN CONDUCTED WITH DATA NOW BEING DIGESTED TO EVOLVE THE ECO-SYSTEM
- YTD NPS OF 86 (UP FROM 84 LY)



MAY: CUSTOMER SCANS  
DELIVERED THROUGH CRM



AUG: ACCESS FIT BASED  
RECOMMENDATIONS ONLINE



OCT: PERSONALISED SHOE  
WALLS





STYLERUNNER  
ARMADALE, MELBOURNE



# STYLERUNNER: STORE ROLLOUT

## BY THE NUMBERS:

- 3 STORES NOW TRADING (& WELL AHEAD OF EXPECTATIONS)
- 6 STORES WITH AGREED TERMS, EXPECT AT LEAST 10 TO BE TRADING BY DECEMBER
- VARIED SITE SELECTIONS & EARLY SIGNS SUGGEST SIGNIFICANT RUNWAY
- LANDLORD INTEREST IS DRIVING HIGHER THAN ANTICIPATED EBIT RETURNS
- SIGNIFICANT SOCIAL & DIGITAL FOLLOWING DRIVING BRAND RECOGNITION & STRONG STORE LAUNCH OUTCOMES

INSTAGRAM

600k+

FACEBOOK

75k+

EMAIL

150k+

SESSIONS / YR

4.5m+





# STYLERUNNER: THE LABEL

## BY THE NUMBERS:

- SINCE LAUNCHING, STYLERUNNER THE LABEL REPRESENTS C. 30% OF TOTAL SALES
- GP% BEING ACHIEVED IS SIGNIFICANTLY HIGHER THAN 3<sup>RD</sup> PARTY BRANDS
- NEW CAPSULES DROP INTO STORE & ONLINE MONTHLY
- TEAM FOCUSED ON DRIVING MIX OF BUSINESS ACROSS APPAREL & ACCESSORIES



FASHION

PERFORMANCE

INTRODUCING  
**STYLERUNNER**  
THE LABEL



# THANK YOU

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