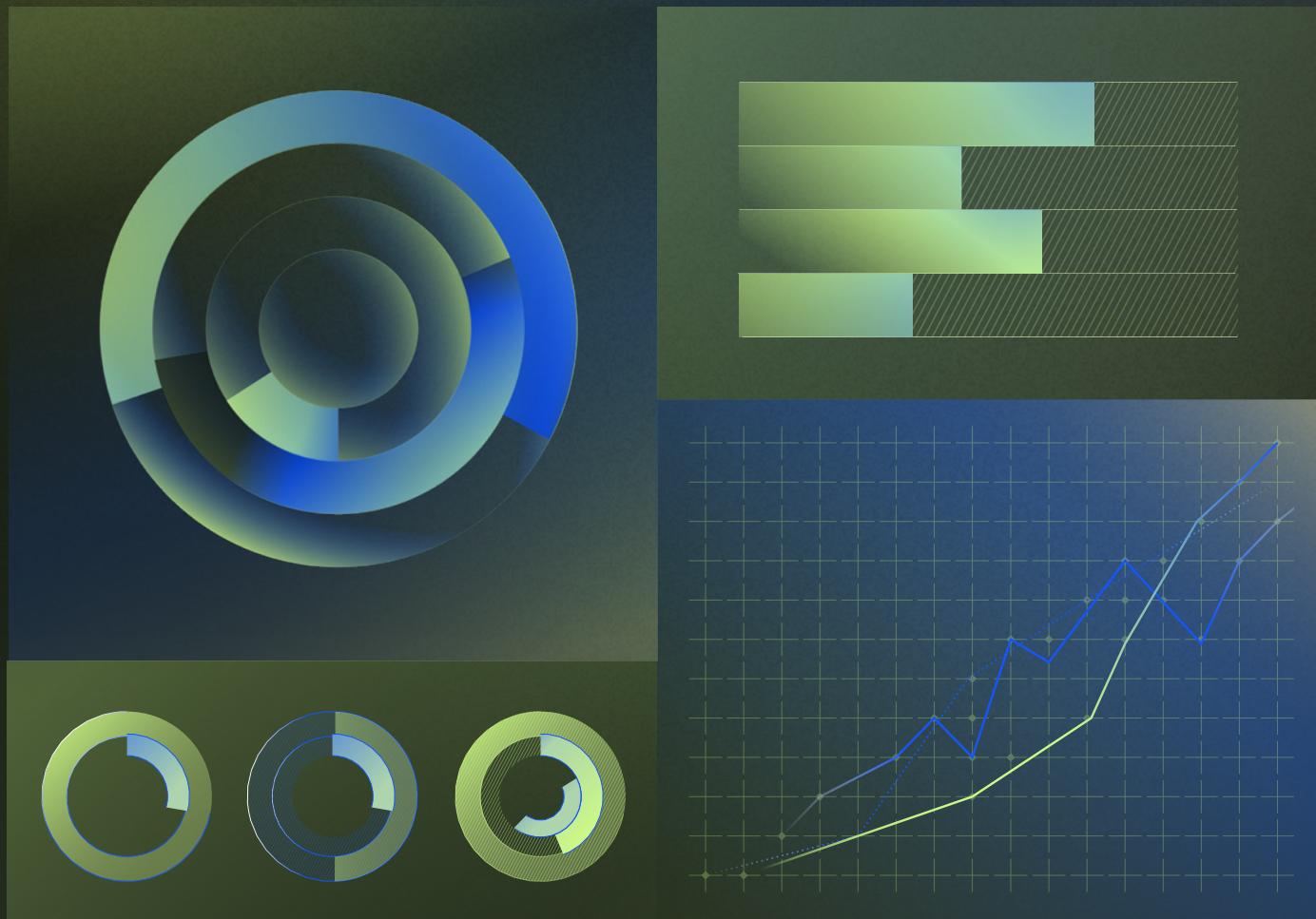


# Ecommerce growth guide

How over 875 million people shop  
—and the insights to guide your growth strategy



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# 01 The tremendous opportunity of today's digital marketing landscape

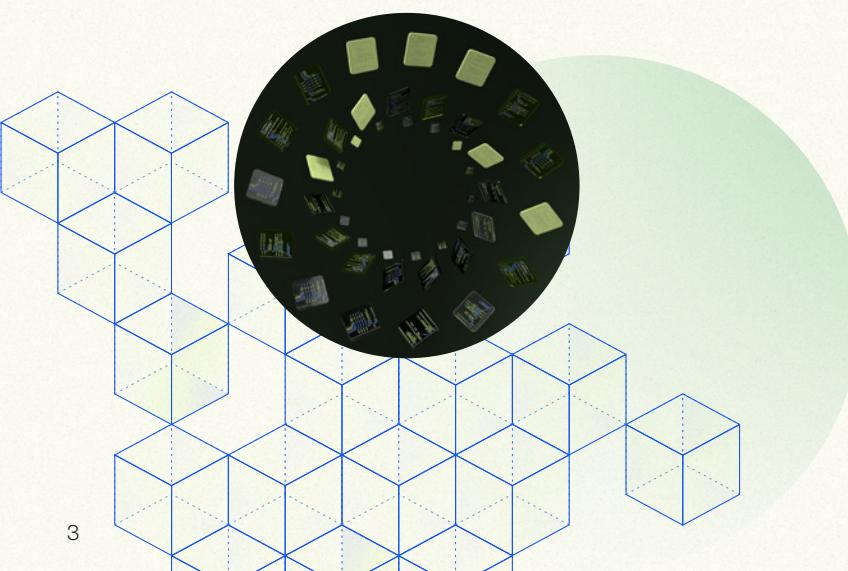
The history of digital marketing is marked by major events we'll never forget—the first clickable ad, the advent of Web 2.0, the arrival of social media, and now the decline of third-party cookies, the rise of AI, and more on the horizon. Today, we're witnessing yet another historic moment in digital marketing: consumer behaviors, privacy regulations, and technologies are changing across the industry—with higher competition than ever—which in turn means that marketing executives and ecommerce leaders need to adapt now more than ever. Plus, consumers expect configuration at every touchpoint—in other words, a buyer journey driven by technology, complete with personalization and customization options. They expect seamless experiences everywhere they shop, not just online.

Ultimately, your success lies in your ability to effectively target your best buyers, activate buyer insights to deliver personalized shopping journeys that convert, and build a sustainable, long-term growth engine for your business. It's to that end that we've created this report, based on vast amounts of consumer behavior data pulled from all the commerce that runs through Shopify.

Because while it's true that understanding your customers has always been the key to your success, the strategies you've relied on in the past to achieve that understanding must now change to fit this new reality. What's more, you're expected to deliver results that drive growth not just in the face of changing customer expectations, but also facing a constantly changing market.

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Our dedication to innovation is unmatched, supported by a workforce of thousands of engineers.



**01**  
THE TREMENDOUS  
OPPORTUNITY OF  
TODAY'S DIGITAL  
MARKETING  
LANDSCAPE

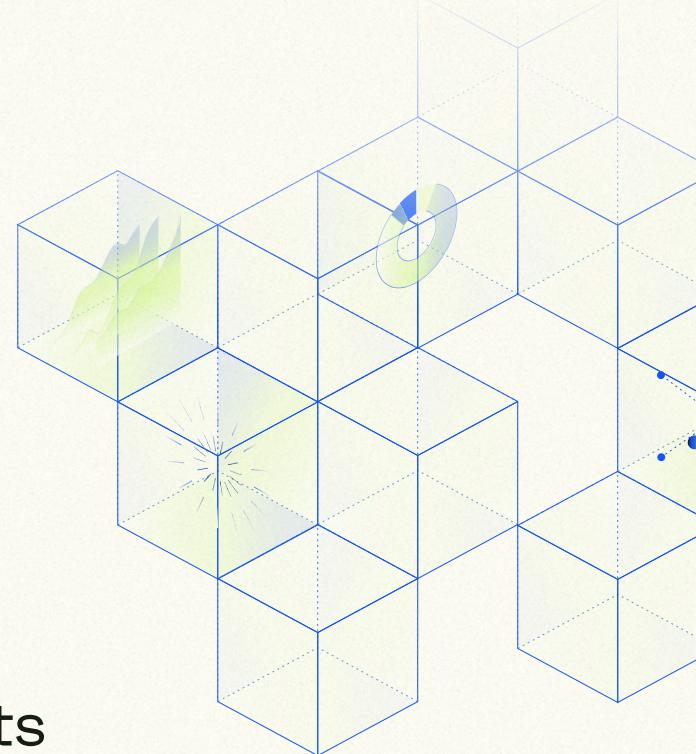
We understand that with the big changes in this market come new challenges—but we're equally confident that with Shopify's unique growth solutions, you can grow your business now and into the future. We pride ourselves on our innovation, culture of change, future-focused technology, and unique marketing and advertising tools. We've invested in unique acquisition tools like Audiences and Shop Campaigns to help reduce ad spend, solutions for customer behavior and attribution measurement, like pixels and first-party identity resolution that help connect customer behavior data across channels with customer identity to give you the best customer acquisition cost in the industry.



## The best growth strategies are built on a foundation of insights

We've performed a detailed, in-depth analysis of the high volume of people who shop on our platform—a sampling of more than 875 million unique online shoppers purchasing from Shopify businesses in 2024, representing a significant portion of global commerce. Between this massive pool of information, our best-in-class platform that has processed more than 5.5 billion orders, and our consistent high positioning in analyst reports, we're uniquely positioned to provide these insights—and we're thrilled to share it, both in the service of our customers and commerce around the world.

Beyond our solutions built for growth (which we'll cover in more detail later), we've also taken it upon ourselves to dig deep into our internal Shopify data and pull out strong insights to help guide your strategy in the face of today's shifting marketing landscape, to help you capitalize on this massive opportunity and drive growth in the years to come.



Here are a few of the key questions we analyzed and will discuss in detail throughout this report:

---

- 01** What are the overall online growth trends?
- 02** Which ecommerce industries are growing the fastest?
- 03** How is the Shop network driving growth?
- 04** Which sales and advertising channels are delivering the highest value?
- 05** How is unified commerce impacting overall commerce?

01  
THE TREMENDOUS  
OPPORTUNITY OF  
TODAY'S DIGITAL  
MARKETING  
LANDSCAPE

With this information, we hope to equip you with valuable trends and insights to help inform your growth strategies as you plan for 2025 and beyond.

Still, information is just one side of the growth equation. In addition to our detailed insights, we have the tools you need to put those insights into action—solutions tailored to help your business grow, no matter your strategy or requirements. In this report, we'll help you build your marketing strategies for this new world with a foundation of industry-leading consumer data and insights.

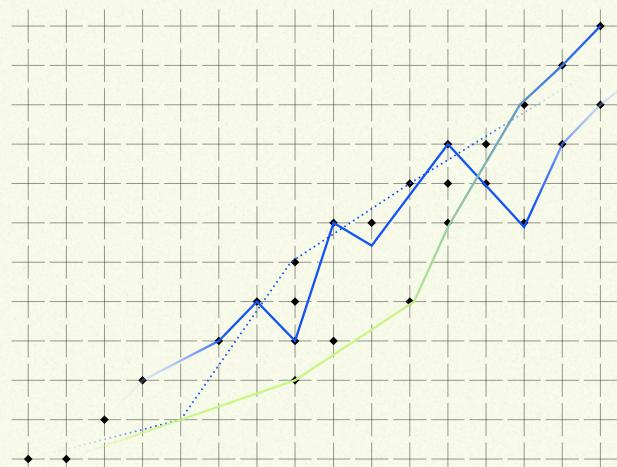
We'll highlight key trends pulled from our data, showcase expert insights from local leaders, and offer steps you can take with Shopify to grow your business.



Get a quick, high-level overview of all Shopify growth solutions.

## Where we pulled our data

The data in this report includes information and trends across industries that sell on the Shopify platform, revenue bands classified based on the annual GMV of each business, and all major global regions based on shop information as of October 1, 2024. Our analysis focuses on online orders that had any GMV contributions (positive or negative) from non-fraudulent shops. Yearly data spans from Q4 to Q3 of the next year—for example, 2024 spans inclusively from Q4 2023 to Q3 2024. Year-over-year growth compares 2023 to 2024, and two-year growth compares data from 2022 to 2024. Average order value analysis excludes orders exceeding US\$500,000.



Talk to one of our experts about how our solutions can help you execute your growth strategy.

→ GET IN TOUCH

## 02 What our research revealed

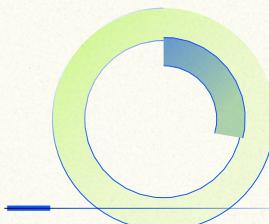
### Overall online shopping growth



**17%**

increase in first-time shopper orders

Orders placed by first-time shoppers to each Shopify business increased 17% since 2023 and 33% since 2022 across all regions and revenue bands.



**59%**

increase in return shoppers

Over the past 2 years, we've seen a 59% increase in return shoppers, an increase of 27% YoY across all regions and revenue bands.



**49%**

increase in mobile device use

Over the past 3 years, we've seen a 49% increase in order volume growth, with a 43% increase over the past 2 years more specifically, an increase of 21% YoY.



**44%**

increase in mobile purchase volume since 2022

Over the past 2 years, most orders are placed on mobile devices—and mobile purchase volume increased by 20% between 2023 and 2024, and 44% since 2022.



#### INSIGHTS

Online shopping continues to be propelled by mobile, with order volumes, return shoppers, and first-time shoppers all increasing across the board.

**Nº1**

growing device

Mobile is the top-growing device by order volume across regions and revenue bands.



# Growth of key industries

Globally, key ecommerce industries are continuing to see significant year-over-year growth. For shops generating more than \$1 million in annual GMV (approximately €970,000 or £820,000 as of January 2025) we see the following industries ranked at the top by overall order volume:

- 01 Apparel and accessories
- 02 Health and beauty
- 03 Home and garden
- 04 Food and beverages
- 05 Arts and entertainment

Across North America, Asia-Pacific, and Europe, the Middle East, and Africa, as well as across all revenue bands, the industries of apparel and accessories, health and beauty, and home and garden hold strong as the top three by order volume.



## INSIGHTS FROM KEY INDUSTRIES

We've collected a selection of insights from businesses on Shopify in high-performing industries to showcase what they're seeing in the market. And we've paired those insights with third-party data that helps illustrate that point.

### FOOD AND BEVERAGES

WATERDROP

Waterdrop is a producer of water flavour granulates and water bottles, founded in Austria. The company achieved an impressive 30-40% annual growth rate, establishing a strong presence in over 30 countries. Their innovative retail strategy creates immersive in-store brand experiences, and leverages data-driven insights to optimise inventory management and drive customer satisfaction.

[READ THE STORY](#)

**waterdrop<sup>®</sup>**

80% of global retail companies that have opened a popup store said it was successful—and 58% are likely to do it again  
—Business Insider



## HEALTH AND BEAUTY

### OH MY CREAM

The team at Oh My Cream, a French concept store dedicated to alternative and clean beauty recognised the demand for seamless, intuitive, self-service shopping experiences. By empowering their customers to explore and purchase with ease, they tapped into evolving expectations in retail, resulting in a 50% increase in customer lifetime value.

[READ THE STORY](#)

### OH MY CREAM!

100% of buyers want to self-serve all or part of their buying journey.

—TrustRadius



### PINALLI

Pinalli, the largest supplier of beauty products in Italy since the 1980s, knew they had to adapt and modernise. The opening of their online store meant their customers could easily navigate to and browse thousands of products in one place, which helped to streamline the buying journey, leading to a 28% increase in conversion rates.

[READ THE STORY](#)

“

### PINALLI

Shopify is an essential tool for any multi-brand retailer. It is a partner that keeps improving and allows us to grow our offering with efficient out-of-the-box solutions.

Luca Alberici,  
PMO Strategic Marketing, [Pinalli](#)

### JUNGLÜCK

Jungluck, a German brand committed to sustainability and natural beauty, wanted to grow internationally but they recognised that they needed to optimise their ecommerce platform. By making it easier for customers to discover and purchase products, they achieved a remarkable 7X increase in revenue.

[READ THE STORY](#)

### JUNGLÜCK





## APPAREL AND ACCESSORIES

### REPRESENT

Founded in the UK, Represent rapidly expanded from a two-man online operation, to a global fashion brand making over £100 Million in revenue in 2024 with pop-up shops around the world, and bricks-and-mortar stores in L.A. and Manchester. By embracing a unified commerce strategy, and integrating data and operations across locations and online, they deliver a seamless shopping experience to their customers.

[READ THE STORY](#)

### REPRESENT

Retailers seeking to keep pace with market changes are taking a unified approach to commerce technologies.

—EY



### BRAUN BUFFEL

Braun Büffel, a German leather goods company founded in 1887, have a strong international market presence, but as they expanded their sales channels to ecommerce, lacked a user-friendly website that effectively converted customers. By moving to Shopify and unifying their online and offline channels, they improved product presentation, and streamlined the shopping experience – without needing a team of developers. This approach led to a 50% increase in conversion rates.

[READ THE STORY](#)

“



Shopify is our first and best sales representative, providing us with the data we need for our strategic decisions. This is our number one growth plan.

Artur Wagner,  
Chief Digital Officer, [Braun Büffel](#)

### ODAJE

The French company Odaje is the first circular footwear brand. Odaje was used to managing their in-store and online channels but recognised the potential for a more cohesive approach, bridging the gap between online purchase and in-store pick up. They successfully unified customer data across all platforms, which had positive knock-on effects in multiple areas of the business, including a 25% increase in international sales.

[READ THE STORY](#)



## SPORTS AND RECREATION

### CERAMIC SPEED

CeramicSpeed, a leading manufacturer of premium quality bicycle parts from Denmark, understood that simplifying the buying experience was the key to boosting customer loyalty in a competitive market. By focusing on personalised subscription models and streamlined online checkout features for returning B2B and B2C customers, they achieved a 29% increase in average order value within 8 months.

[READ THE STORY](#)

90% of loyalty program owners reported positive ROI, with the average ROI being 4.8x.

—Antavo



### HOME AND GARDEN

### WESTWING

Westwing, a German Home and Living brand, migrated to Shopify with international growth in mind. Moving from a complex custom platform to headless architecture allowed them to maintain a seamless checkout for existing customers, while easily replicating components to go-live in new countries. With an eye on the future, they are also exploring click-and-collect options, ensuring a consistent brand experience across markets and channels.

[READ THE STORY](#)

### WESTWING

All age groups surveyed reported that they shop online and have purchases delivered more than they pick up in-person or curbside.

—Delighted by Qualtrics

### FLYING TIGER

Flying Tiger is a Danish variety store chain. The team recognised the shift in consumer preferences towards online shopping experiences from home, with convenient delivery options. So they unlocked their online channels, enabling them to expand into 27 new markets, in just one day.

[READ THE STORY](#)



## INDUSTRIAL CARRIER

Carrier believes that conversational commerce, mobile commerce and VR technologies will accelerate the buying funnel for enterprise companies. Now they can launch e-commerce experiences in just 30 days, compared to 9-12 months on their previous platform, allowing them to quickly introduce innovative features that elevate the customer experience.

[READ THE STORY](#)

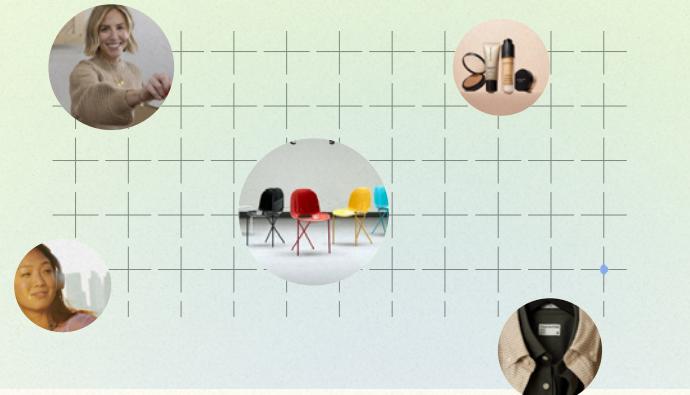
This is just a handful of perspectives. Find more expert insights in our case study library.

[BROWSE CASE STUDIES](#)



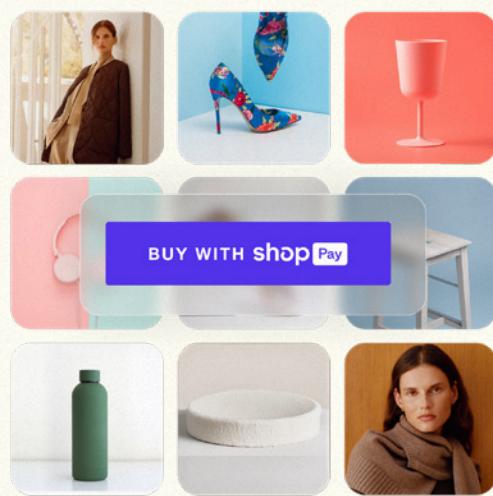
Conversational commerce—or the practice of customers interacting with businesses through conversational technologies like chatbots or messaging apps—is anticipated to develop at 16.3% CAGR from 2024 to 2034, reaching US\$34.41 billion by 2034 (approximately €33.33 billion or £28.2 billion as of January 2025).

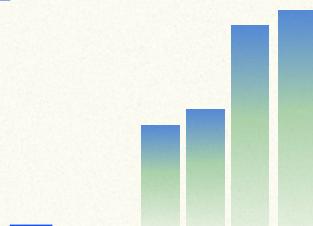
—Future Market Insights



## Performance of the Shop network

With a suite of innovative products—like Shop app toShop Pay—the Shop network, powered by Shopify, is transforming the way people shop. It serves as a mobile-first shopping channel and digital wallet, trusted by over 150 million shoppers worldwide. The app's popularity is reflected in its over 500,000 five-star reviews, solidifying its status as a global favorite.



OVERALL  
PERFORMANCE**2.6x**

In 2023, the number of buyers purchasing on Shop increased 2.6x.

**77%**

Shop Pay users are 77% more likely to make an additional purchase on any Shopify store after making a purchase.

**25%**

On average, for example 25% of any UK-based business's customers are Shop Pay users.

CUSTOMER  
LOYALTY**6.3x**

The top 100 brands that use the Shop app see buyers repurchase up to 6.3x faster than those with a Shopify website alone.

**59%**

59% of orders on Shop are from return buyers.

**20%**

20% of orders on Shop are from buyers who previously bought from the same business on Shop.

CAMPAIGN  
EFFECTIVENESS**24%**

As of Q1 2024, Shop Campaigns drive up to 24% of new customer growth.

**50%**

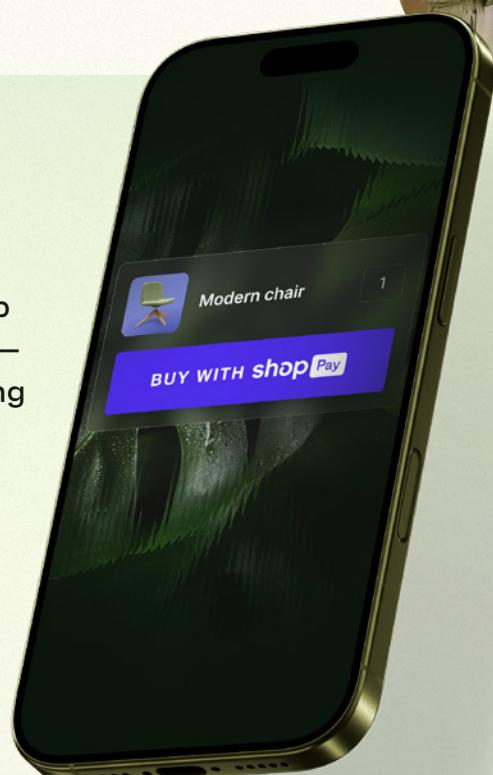
50% of brands get their first order from a Shop Campaign within 48 hours of creating it.

**1M+**

In 2023, Shop Campaigns helped brands acquire over 1 million new customers.

CUSTOMER  
BEHAVIORS**70%**

Shop Pay users use a mobile device more than 70% of the time when making an online purchase.



## THE INSIGHT

Shop isn't just one of the top shopping apps in the world—it's also significantly boosting both customer acquisition and brand loyalty for the brands that use it.

**65%**

When Shop Pay is available as a checkout method on an online store, Shop Pay users choose to check out with Shop Pay more than 65% of the time.



# Sales and advertising channel rankings

While search, social, and email remain steadfast sources of growth across all regions and revenue bands, affiliates have emerged as a powerful referring channel when ranked by average order volume.

## REFERRING CHANNELS BY REGION, RANKED BY AOV:

Across the globe, the affiliate referring channel is rising through the ranks.





## GLOBAL REFERRING CHANNELS BROKEN OUT BY REVENUE BAND AND RANKED BY AOV:

Affiliate and direct channels are consistently the last-referring channel for businesses making more than \$1 million GMV (approximately €970,000 or £820,000 as of January 2025).

|           | <\$10,000 | \$10,000–\$100,000 | \$500,000–\$1 MILLION | \$1 MILLION–\$150 MILLION | >\$150 MILLION |
|-----------|-----------|--------------------|-----------------------|---------------------------|----------------|
| <b>01</b> | Direct    | Direct             | Direct                | Direct                    | Affiliate      |
| <b>02</b> | Email/SMS | Search             | Other                 | Affiliate                 | Direct         |
| <b>03</b> | Search    | Email/SMS          | Search                | Other                     | Search         |
| <b>04</b> | Other     | Other              | Email/SMS             | Search                    | Other          |
| <b>05</b> | Affiliate | Affiliate          | Affiliate             | Email/SMS                 | Email/SMS      |
| <b>06</b> | Social    | Display            | Display               | Social                    | Display        |
| <b>07</b> | Display   | Social             | Social                | Display                   | Social         |

## GLOBAL REFERRING CHANNELS BROKEN OUT BY KEY INDUSTRY AND RANKED BY AOV:

While channels vary by industry, direct and affiliate are consistent high performers.

|           | FURNITURE | VEHICLES AND PARTS | SPORTING GOODS | LUGGAGE AND BAGS | ELECTRONICS |
|-----------|-----------|--------------------|----------------|------------------|-------------|
| <b>01</b> | Direct    | Display            | Affiliate      | Affiliate        | Display     |
| <b>02</b> | Affiliate | Direct             | Direct         | Direct           | Direct      |
| <b>03</b> | Other     | Other              | Display        | Other            | Affiliate   |
| <b>04</b> | Email/SMS | Affiliate          | Other          | Email/SMS        | Other       |
| <b>05</b> | Search    | Search             | Email/SMS      | Display          | Search      |
| <b>06</b> | Social    | Email/SMS          | Search         | Search           | Email/SMS   |
| <b>07</b> | Display   | Social             | Social         | Social           | Social      |

|           | BABY AND TODDLER | APPAREL AND ACCESSORIES | TOYS AND GAMES | PET SUPPLIES | HEALTH AND BEAUTY |
|-----------|------------------|-------------------------|----------------|--------------|-------------------|
| <b>01</b> | Affiliate        | Affiliate               | Display        | Affiliate    | Direct            |
| <b>02</b> | Email/SMS        | Direct                  | Direct         | Direct       | Affiliate         |
| <b>03</b> | Direct           | Email/SMS               | Affiliate      | Other        | Other             |
| <b>04</b> | Other            | Display                 | Other          | Search       | Email/SMS         |
| <b>05</b> | Search           | Other                   | Email/SMS      | Email/SMS    | Search            |
| <b>06</b> | Social           | Search                  | Search         | Display      | Social            |
| <b>07</b> | Display          | Social                  | Social         | Social       | Display           |

## GLOBAL REFERRING CHANNELS BROKEN OUT BY ORDER VALUE:

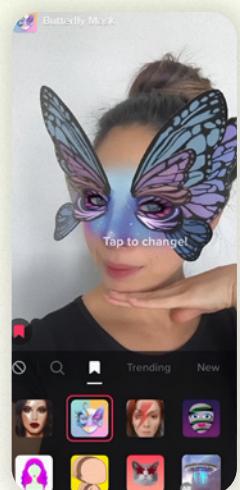
Affiliate, email/SMS, and search are consistently high-performing referring channels across order values.

|    | <\$100    | \$100-\$500 | \$500-\$1000 | >\$1000   |
|----|-----------|-------------|--------------|-----------|
| 01 | Affiliate | Affiliate   | Display      | Display   |
| 02 | Email/SMS | Search      | Search       | Search    |
| 03 | Search    | Email/SMS   | Affiliate    | Affiliate |
| 04 | Display   | Display     | Email/SMS    | Email/SMS |
| 05 | Social    | Social      | Social       | Social    |



## THE INSIGHT

Consumers remain heavily engaged with social media, and they're increasingly influenced by affiliate marketing. Other channels are still effective, but the personal recommendation-based nature of affiliates might be driving the high AOV return of the channel across the board.





# Consumer attitudes and the impact of unified commerce

Unified commerce is a business strategy that integrates all of a business's sales channels, data, and back-end systems into a single platform. The goal of unified commerce is to create a seamless shopping experience for customers across all channels, while also providing you with a holistic view of your business and centralized operations.

**Note:** The data and insights for this section were retrieved from *Future-Proofing Retail*, a report by EY about unified commerce and Shopify, and were not based on any internal data..



## INSIGHTS

Unified commerce drives clear efficiencies for retailers' back offices and also unlocks opportunities to grow sales—not just in-store, but online as well. This unification of in-store and online allows for better clienteling experiences and gives retailers and shoppers the flexibility of smoother shipping and pickup options.

And how exactly does Shopify enable a best-in-class unified commerce strategy for merchants? In a new guide, we explore four core Shopify tools and delve into what they offer, who they help, and how to seamlessly implement them.

Solutions Guide Launching Soon

### IMPACT OF SHOPIFY POS

**22%**

Shopify's POS solution demonstrated a 22% lower overall TCO on average relative to the market set surveyed by EY.



### CONSUMER ATTITUDES

**8.9%**

On an aggregate basis, Shopify's POS solution provides an 8.9% equivalent uplift in sales annually on average.

**57%**

57% of consumers want to see, touch, and feel items before they buy.

**5%**

Operational improvements created by Shopify POS specifically contribute a benefit equivalent of up to a 5% uplift in sales.

**38%**

38% of consumers buy items online and then collect them in-store.

**50%**

50% of consumers say personalized offers and promotions from brands they've interacted with improve their shopping experience.

**+150%**

Shopify POS retailers experienced an equivalent omnichannel sales growth of +150% quarterly on average year over year.





# 04 Build a future-proof growth strategy with Shopify

In the current landscape where privacy is paramount but delivering growth is imperative, businesses can't afford to fall behind when it comes to building and executing effective growth strategies. Our hope is that you can take the trends and insights we've provided and use them as you develop a plan to hit your growth targets in the coming years.

Yet insights are only as effective as the tools you have to act on them. That's why we've built our offerings to move at the speed of commerce—and deliver results even faster. We deliver growth solutions built on a single customer data model that empower you to effectively target your best buyers, and activate buyer insights to drive personalized shopping journeys that convert.

Propelling business growth forward in today's commerce landscape is a herculean task that requires a commerce platform that's just as mighty. With the insights we've shared, combined with Shopify as the foundation for your growth strategy, we're confident that you will experience unprecedented business growth long into the future.

## Shopify has the best total cost of ownership on the market

Shopify is the best commerce platform for generating more revenue at a lower total cost to the business. Simply operating your commerce business on the Shopify core platform can be a major growth opportunity for you. According to research commissioned by Shopify from a leading independent consulting firm, Shopify's TCO is up to 36% better than its competitors, and 33% better on average. Check out our free calculator to see how we can help your business cut costs and boost revenue.

[GO TO THE CALCULATOR](#)

No matter your goals, we have the tools to help your business grow. Browse all of our growth solutions to learn how you can do it all with Shopify.

[EXPLORE THE TOOLS](#)

And if you're ready to take the next step toward long-term profitable growth, get in touch with one of our experts today.

[GET IN TOUCH](#)



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