



RCCSTORE

Navigating your 2022 Holiday strategy

Eric Morris
Managing Director & Head of Retail, Google









... we can't predict the future, but we can prepare



A LEAST THERE'S NO SHORTAGE OF MESSAGING APPS —

Google tells employees to work from home to prevent coronavirus spread

Google wants all

RON AMADEO - 3/11/2020



CBC

Canada is shifting to 'living with the virus' — for better or worse

Feb 5, 2022



The Globe and Mail

This is how close Canada the pandemic

JUN 16 2021

Health Experts Say the COVID-19 Outbreak Has Likely Peaked in Ontario

Modelling shows physical distancing still needed to prevent further
spread

2020

[the Premier](#)

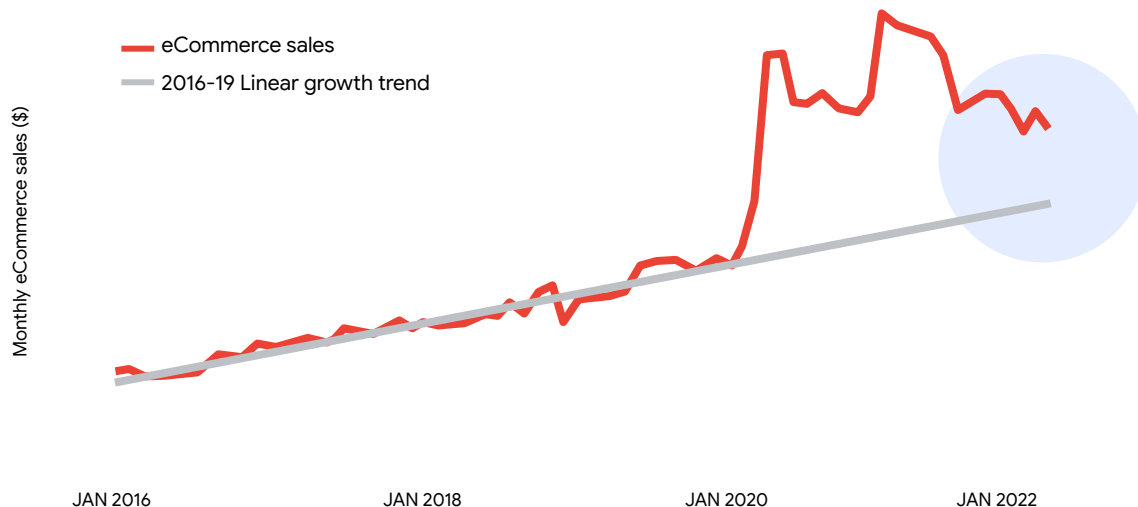
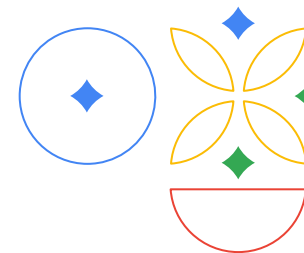


Toronto Star

What new Omicron variants in Ontario and Canada mean for the future of the pandemic

MAY 9 2022

Canadian retail has changed forever



\$80B

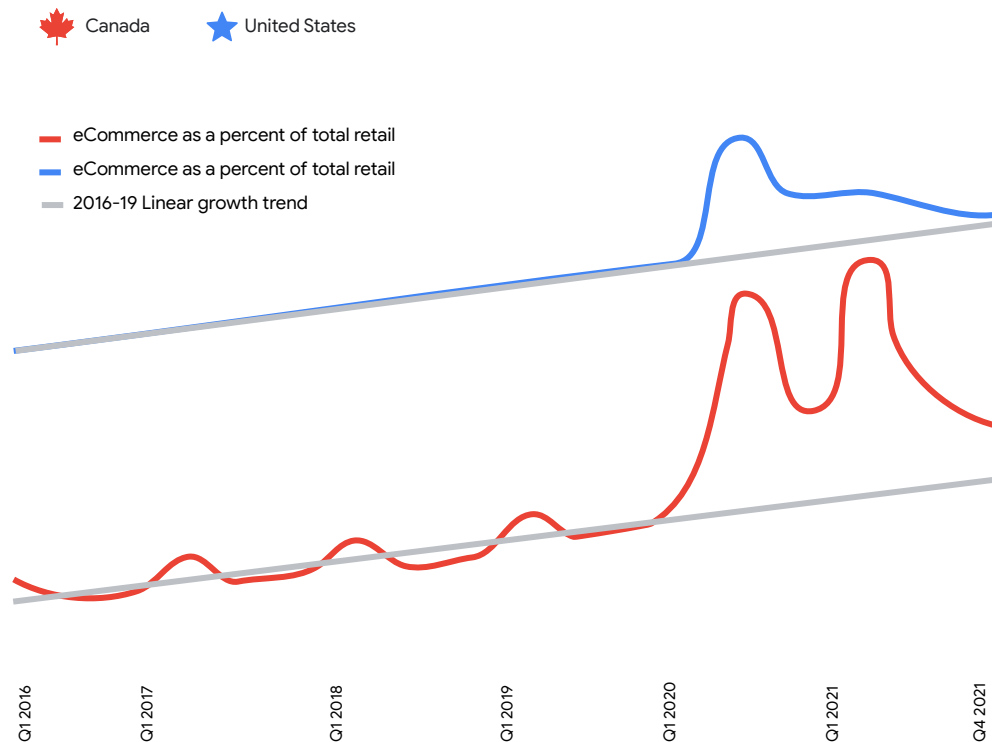
2022 Total
eCommerce sales

14%

2022 eCommerce as
percentage of retail

Canadian eCommerce has accelerated ~3 years; US reverts back to the trendline

eCommerce as a percent of
total retail sales




Digital is now the gateway to commerce



86%

of shoppers **discover
brands/products while
browsing online**



89%

of Holiday shoppers
**searched online first
before a store visit**



70%

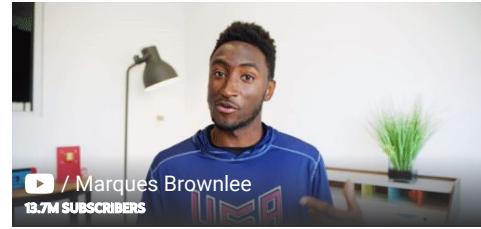
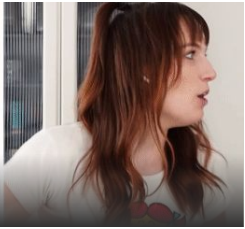
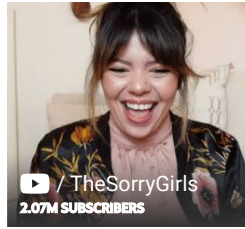
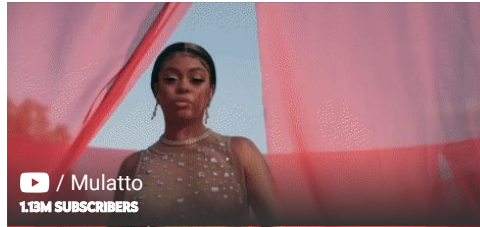
of shoppers purchased a
brand after watching a
video on **YouTube**

Where, how and what we watch has changed



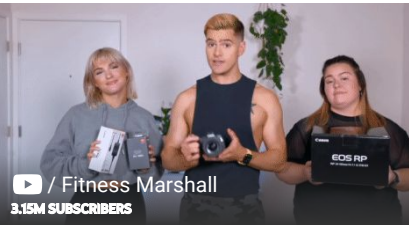
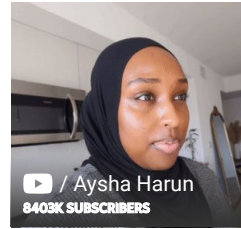
34%

Increase in
YouTube
watchtime
by viewers



16M

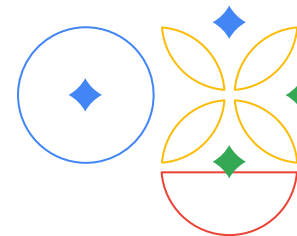
Canadians who
watch YouTube
on their TV



2x

YouTube is more likely
than competitive set to
help consumers make a
purchase decision





Price sensitive searches

Q gas price at costco today **14x**

Q discount code **2x**

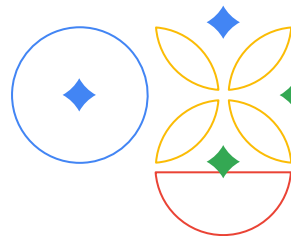
Q price match **7x**

Private label searches

Q mastercraft **2x**

Q costco kirkland **2x**

Q president's choice **1.7x**



Canadians tackling **first time** (in a long time) **jitters**

Q what to wear to a wedding **3.5x**

Q what to wear in miami **14x**

Q what to wear on a plane **4x**

Canadians are looking for **food as social glue**

Q party food ideas **1.5x**

Q charcuterie board **3x**

Q bento box lunch ideas **2x**

Our closet shelves reflect our virtual selves IRL



Tops: **classic and confident**

Q white work shirts

350%

Q linen shirt

97%

Q men's collarless shirt

65%

Q white blouse

144%

Q white satin blouse

133%

Bottoms: from **business casual to business comfort**

Q women's casual pants

34%

Q pull on jeans

57%

Q Men's stretch pants

40%

Q draw string

144%

Q Pants with elastic waist

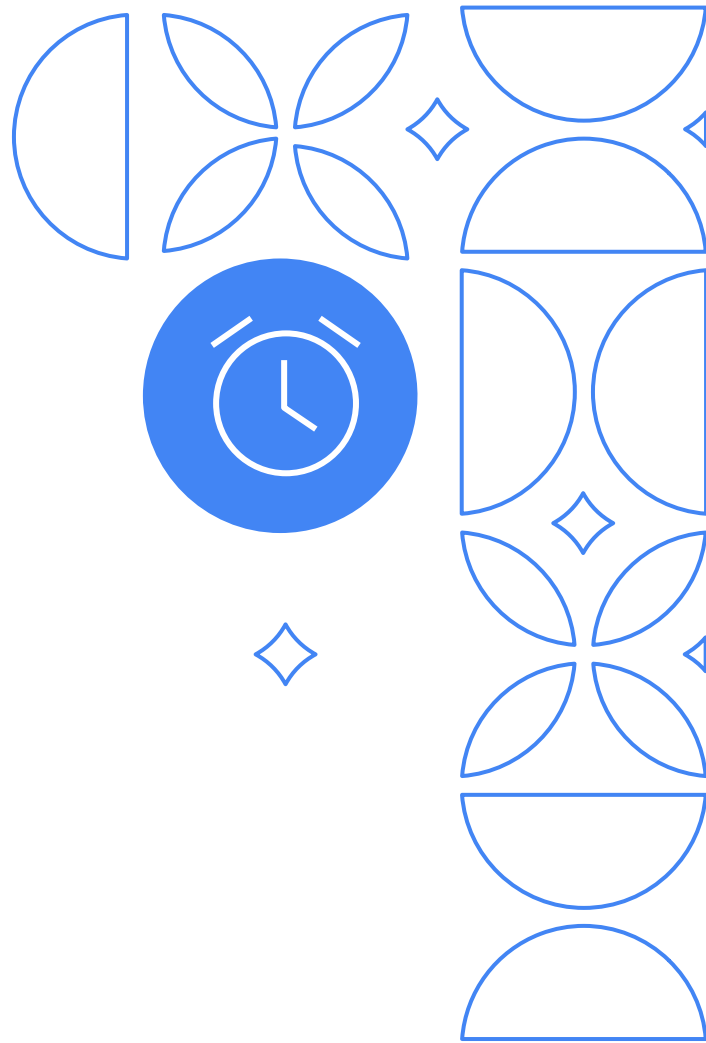
35%

Source: Google search data



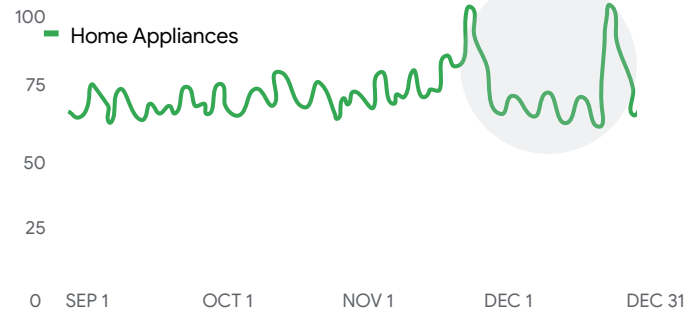
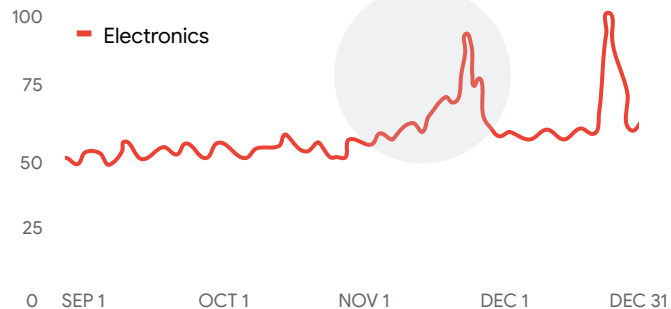
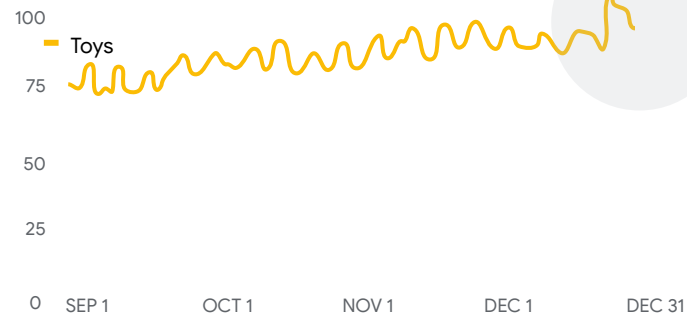
Strategies to win holiday in 2022

**Holiday
shopping is
a marathon,
not a sprint**

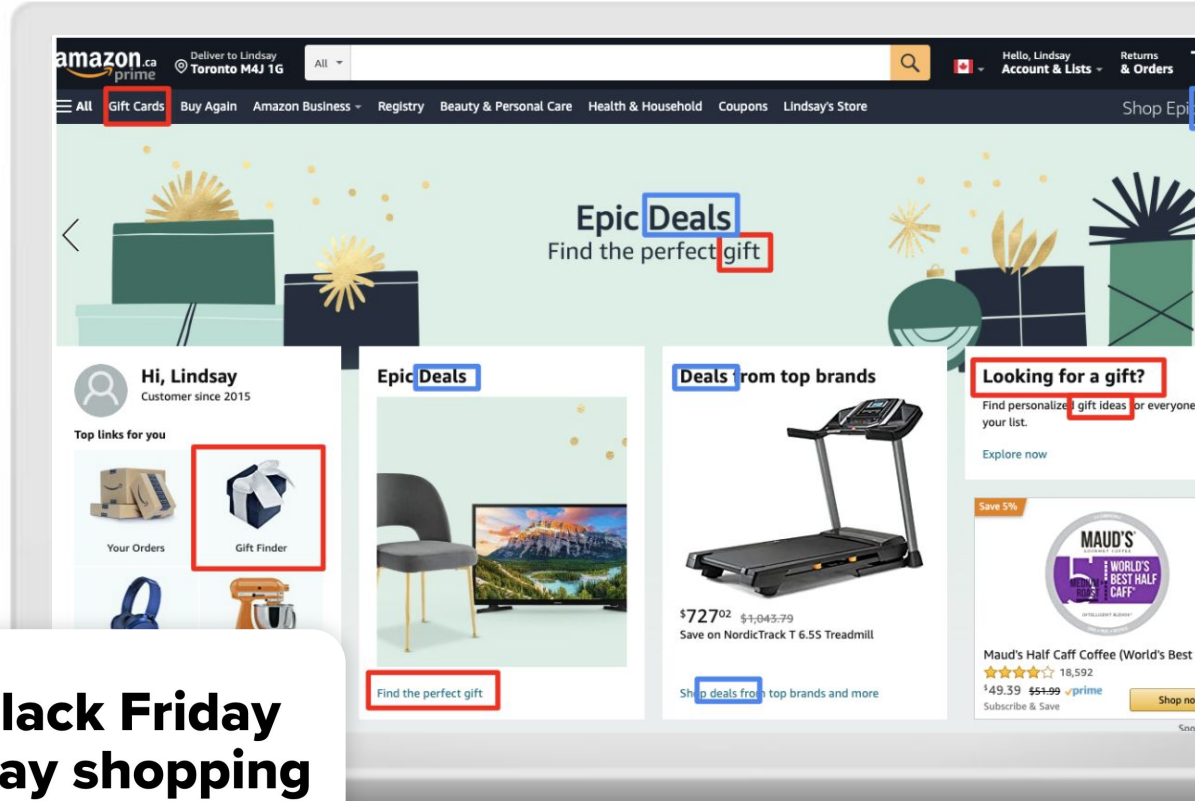


Holiday demand peaks by category

Indexed Google searches



Amazon
kicked off
the season
last year
on Oct 4



TECH

Amazon rolls out early Black Friday deals to jump-start holiday shopping

PUBLISHED MON, OCT 4 2021 9:35 AM EDT | UPDATED MON, OCT 4 2021 6:36 PM EDT

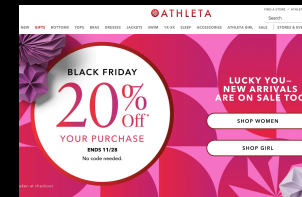
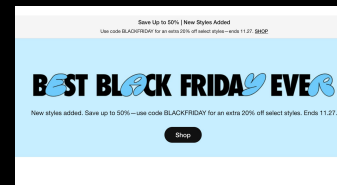
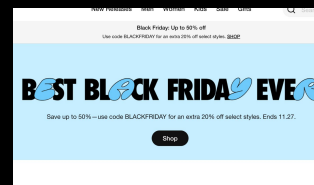
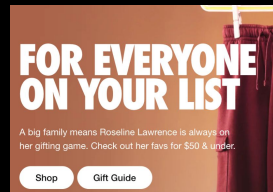
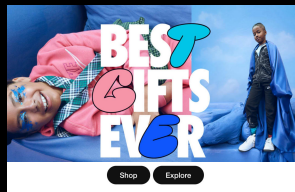
T-25 NOV 1

T-11 NOV 15

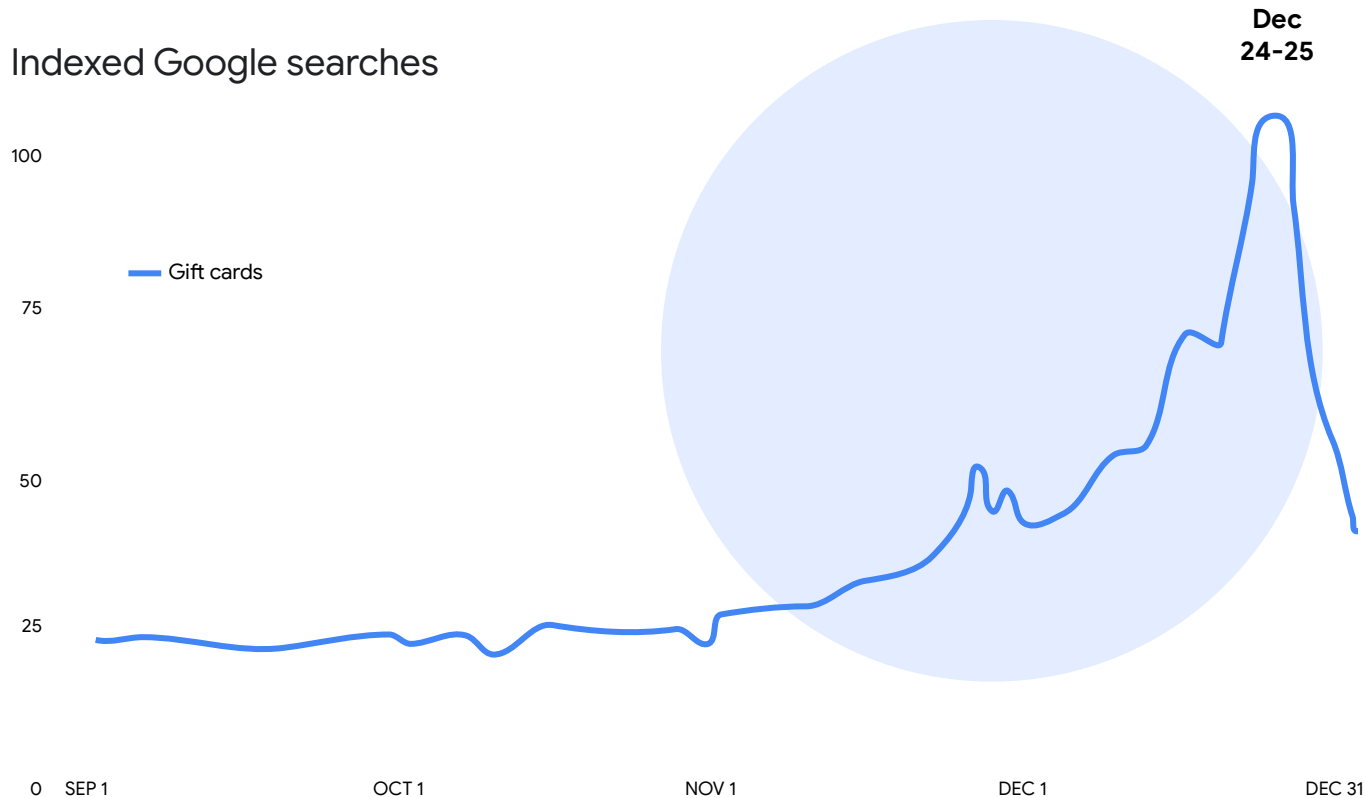
T-7 NOV 19

T-4 NOV 22

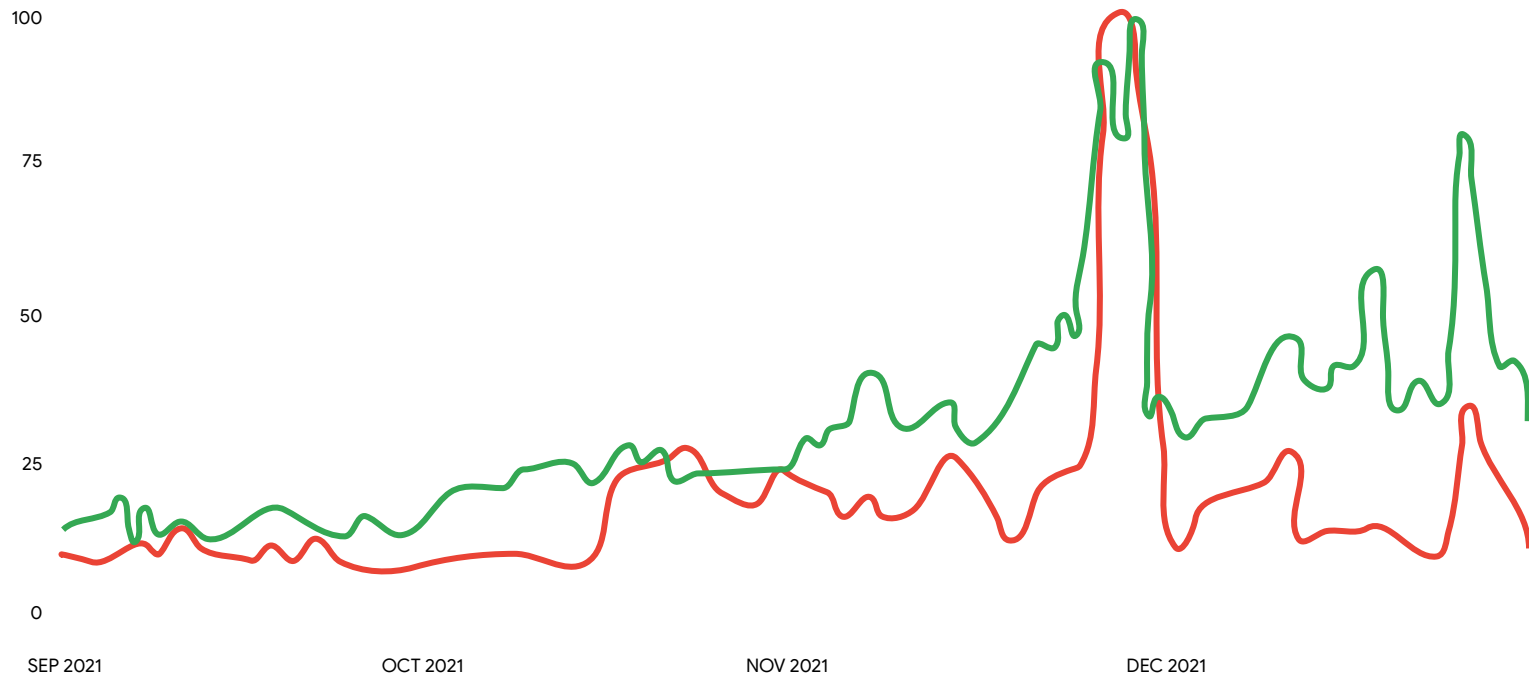
BLACK FRIDAY NOV 26



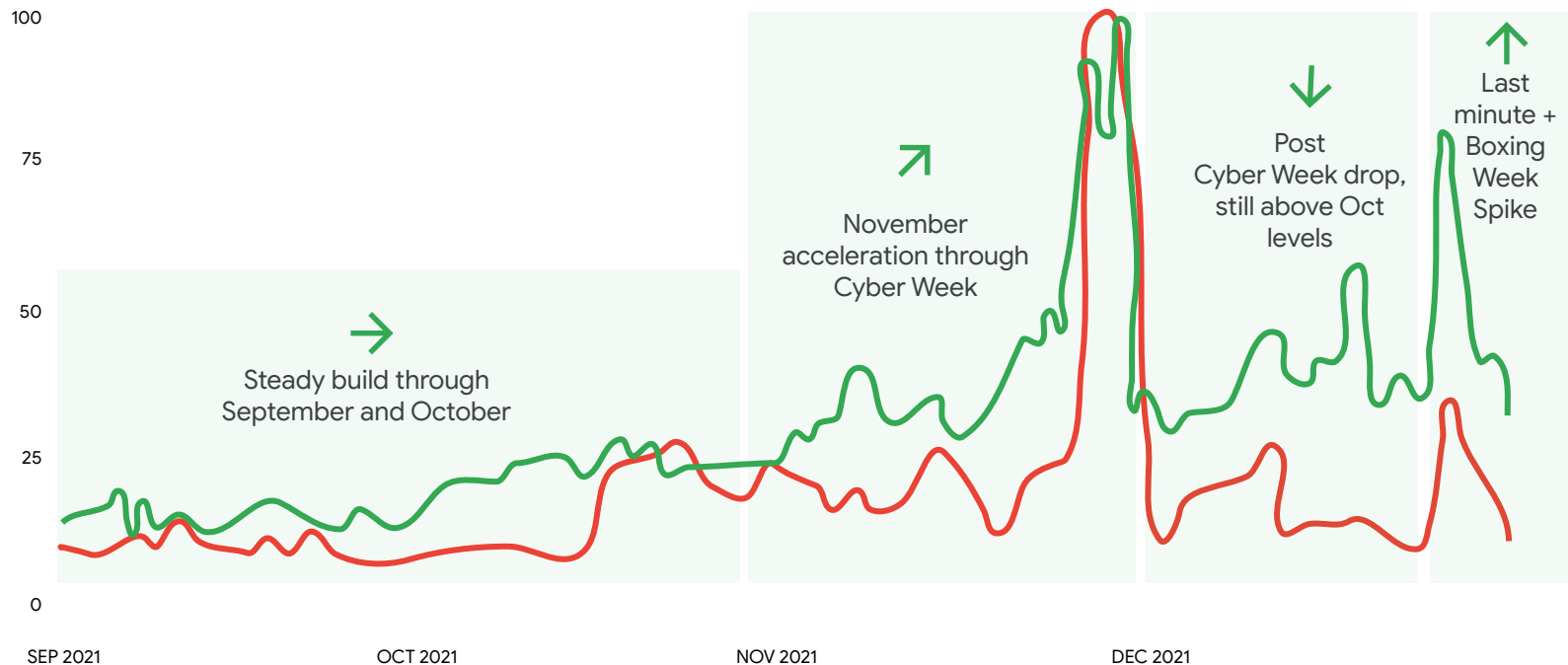
Gift cards are a last minute lifesaver but enter early



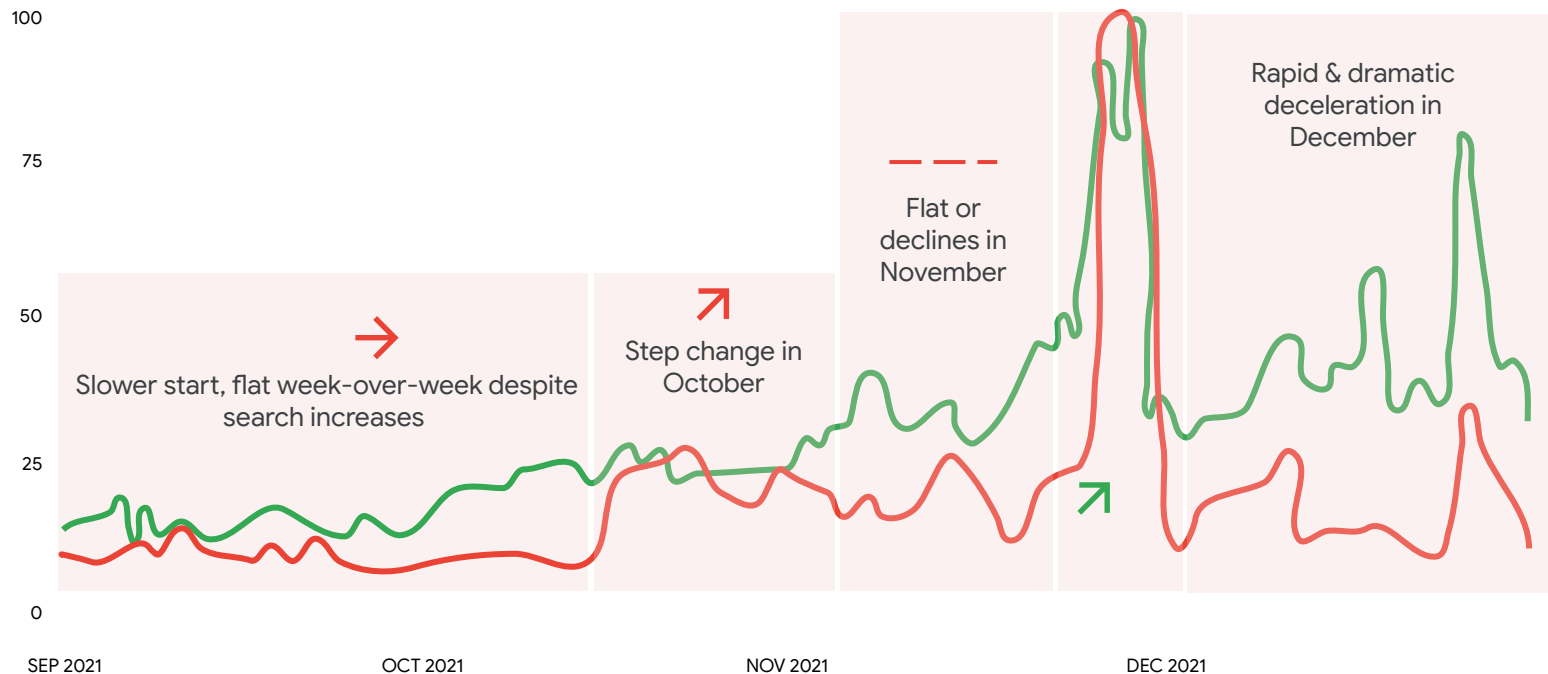
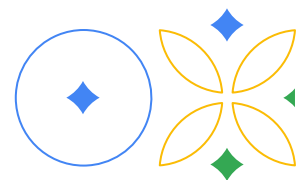
Two competing Retailers, capturing demand differently



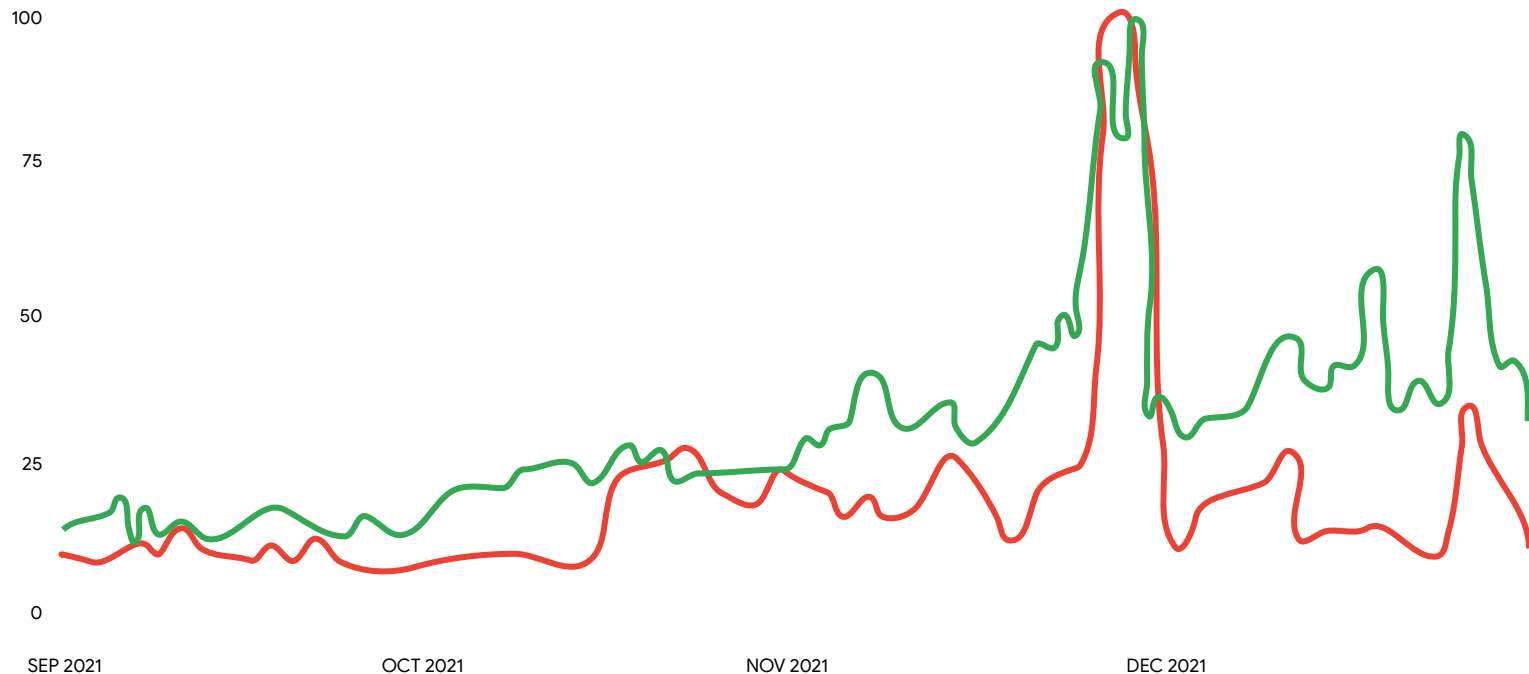
Two competing Retailers, capturing demand differently



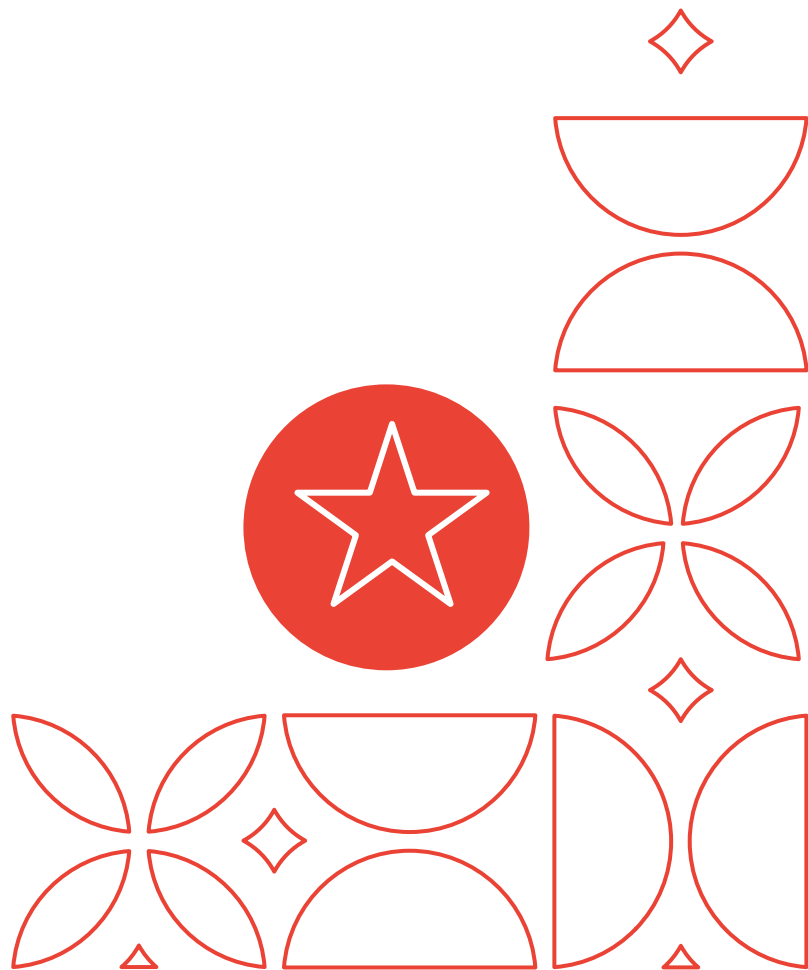
Two competing Retailers, capturing demand differently



Two competing Retailers, capturing demand differently



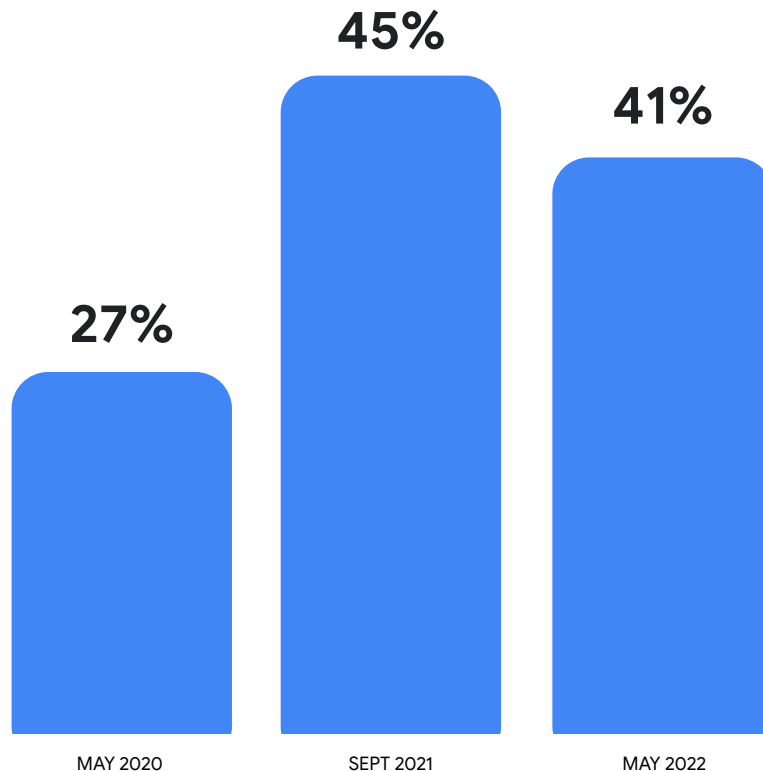
**Focus
on your
best
customers**





Canadians are less loyal and switching more than before

% of Canadians who
have **shopped from a
new brand/retailer**



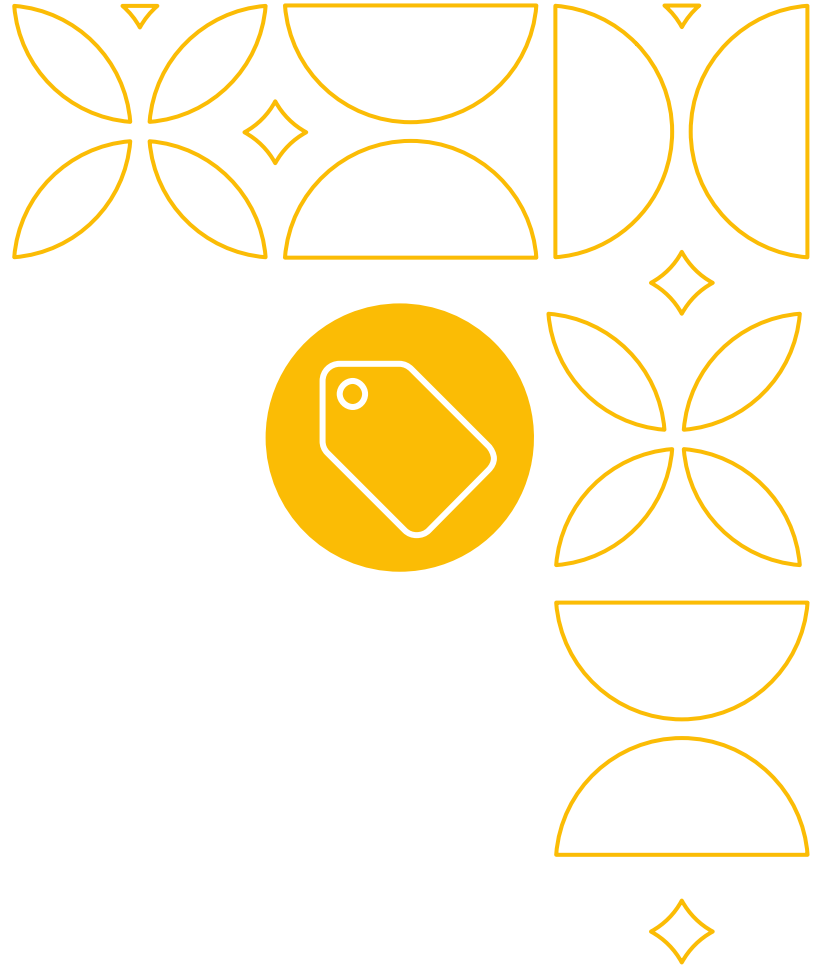
Protect your current high lifetime value customers

CUSTOMER CLV SEGMENT	REVENUES	% REVENUES
Top 20%	\$255M	78%
2nd best 20%	\$37M	11%
3rd best 20%	\$18M	6%
4th best 20%	\$10M	3%
Bottom 20%	\$6M	2%

**Retailers who
adopt value-based
bidding strategies
see a 14% increase
in incremental sales**

RETAILER	ADOPTION	PERCENT INCREASE IN SALES
01	100%	14%
02	90%	13%
03	81%	11%
04	69%	10%
05	55%	8%
06	41%	6%
07	32%	4%
08	30%	4%
09	10%	1%
10	9%	1%

**Win (and
automate)
online AND
offline**



Omnichannel has become the consumer expectation

Omnichannel shoppers are




2x

more valuable
than single-channel shoppers

10x

Searches for [curbside pickup]
vs. pre-COVID

Who is the most valuable customer?

CUSTOMER	ONLINE REVENUE	STORE REVENUE	TOTAL REVENUE
A 	\$70		\$70
B 		\$150	\$150
C 	\$50	\$150	\$200



Mapping
Technology



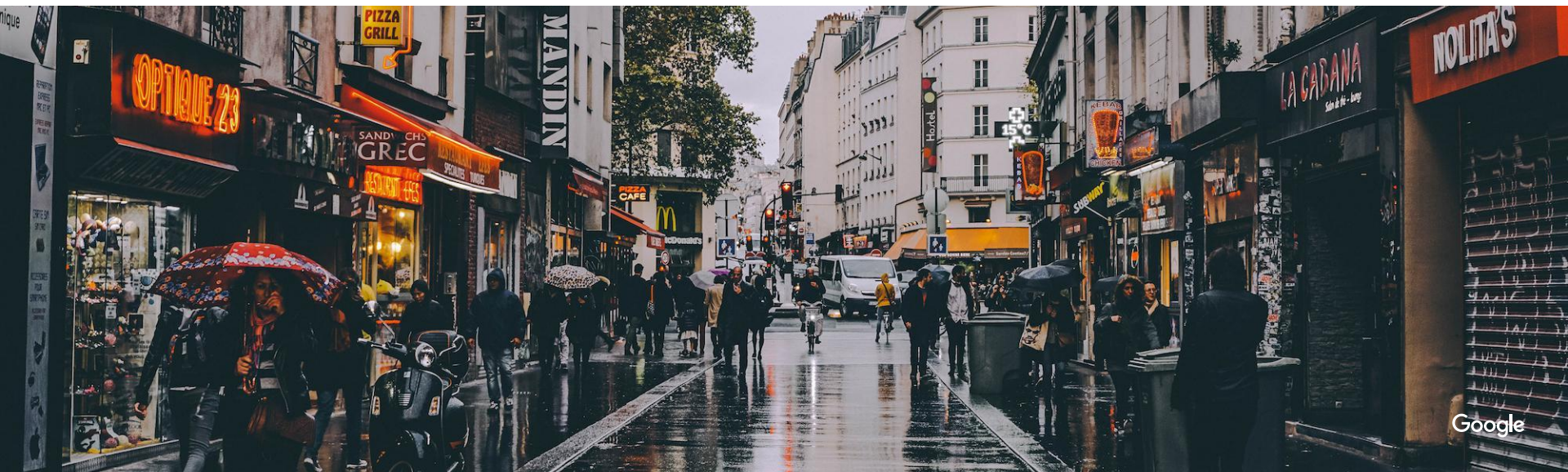
Deep
Learning

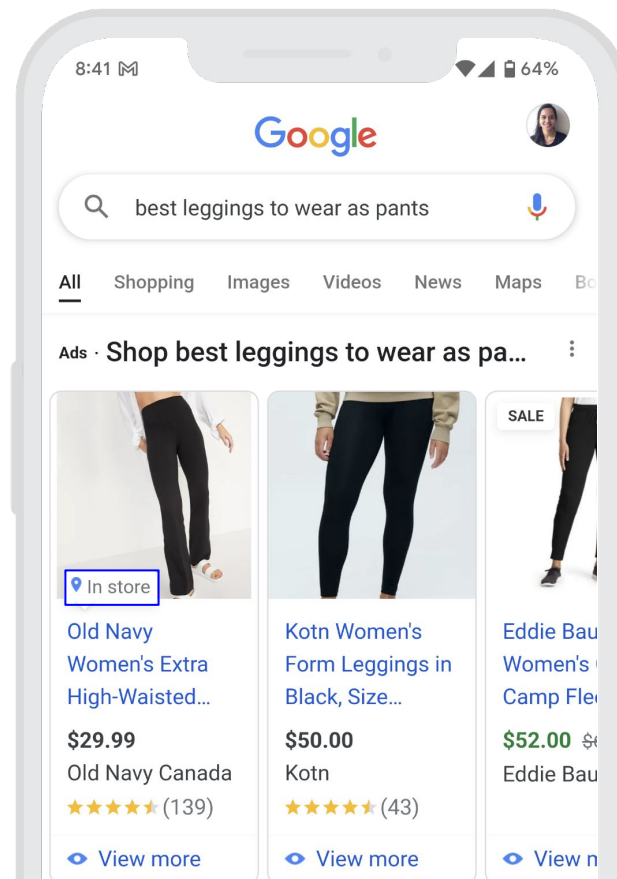
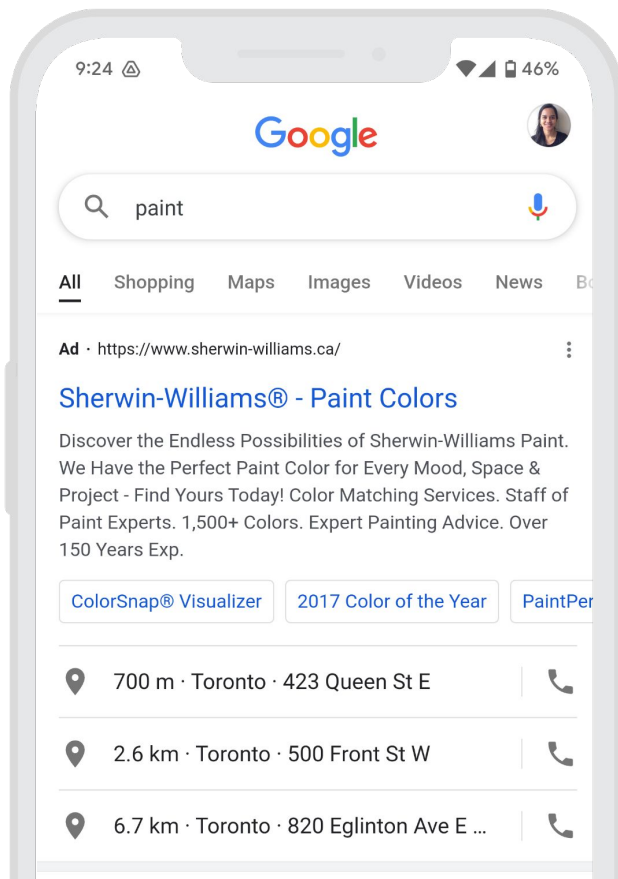


Survey
Verification









1P Store
Transactions





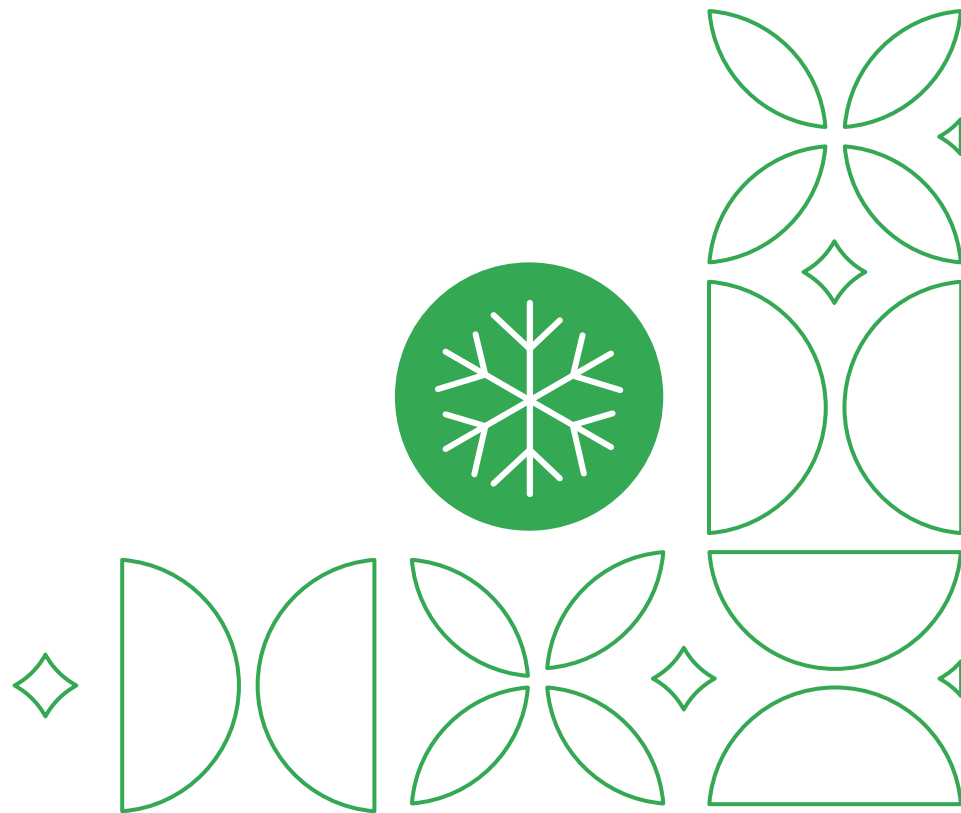
Maximize Sales Across E-Commerce and Stores

CUSTOMER	ONLINE REVENUE	STORE REVENUE	TOTAL REVENUE	OMNI BIDDING
A 	\$70		\$70	\$1.00
B 		\$150	\$150	
C 	\$50	\$150	\$200	 

Canadian Benchmark: automatically optimizing to omni-sales

RETAILER	ADOPTION
01	100%
02	100%
03	98%
04	90%
05	70%
06	30%
07	25%
08	10%
09	3%
10	2%

Mindset



Set
ambitious
goals



Work
the puzzle
together

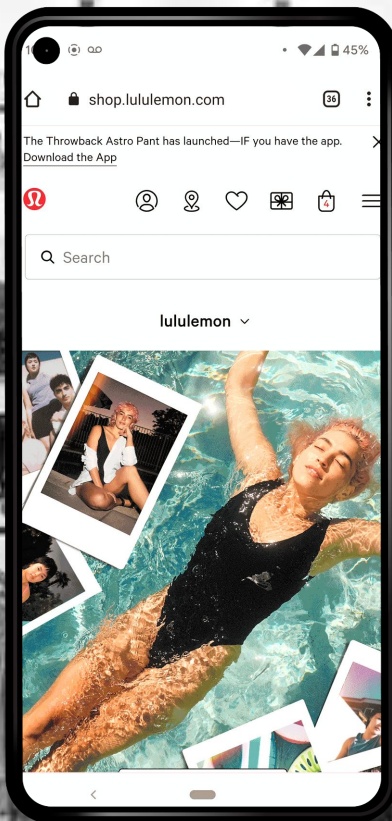
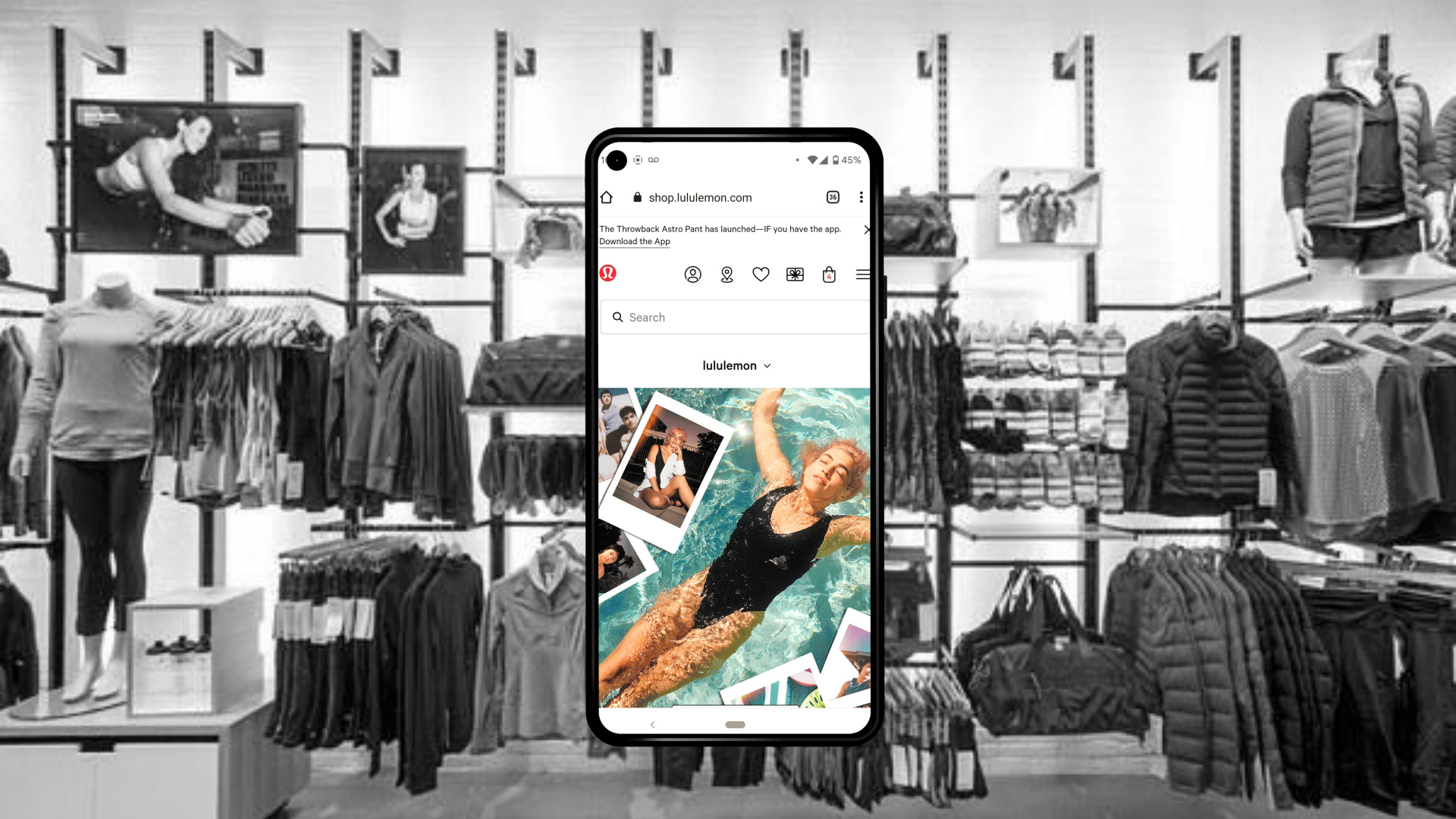




Progress



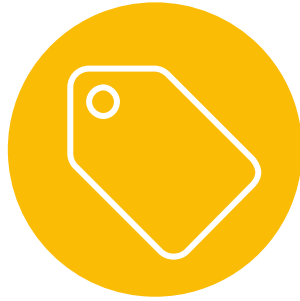
Perfection



Strategies to win holiday in 2022



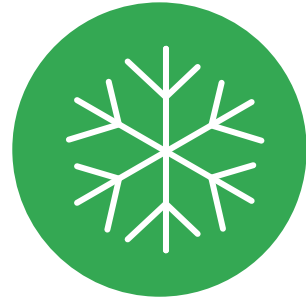
Marathon, not a
sprint (and start
early!)



Win (and
automate) online
AND offline



Focus on
your best
customers



Mindset

Thank you

Eric Morris | emorris@google.com
Managing Director & Head of Retail, Google

