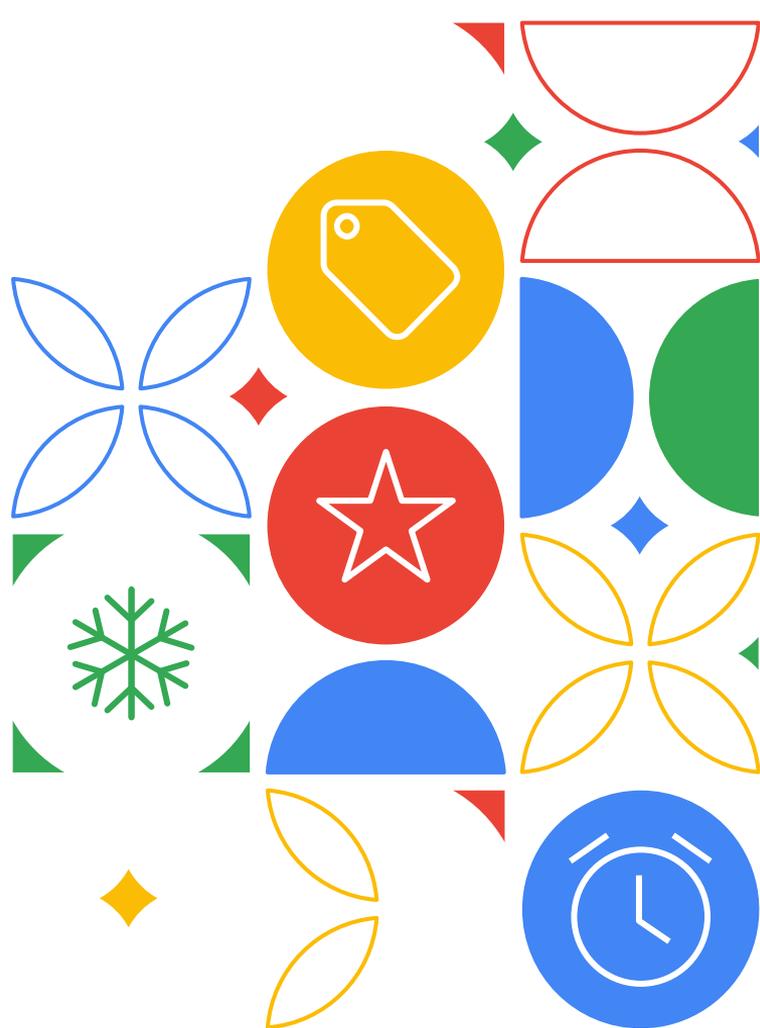


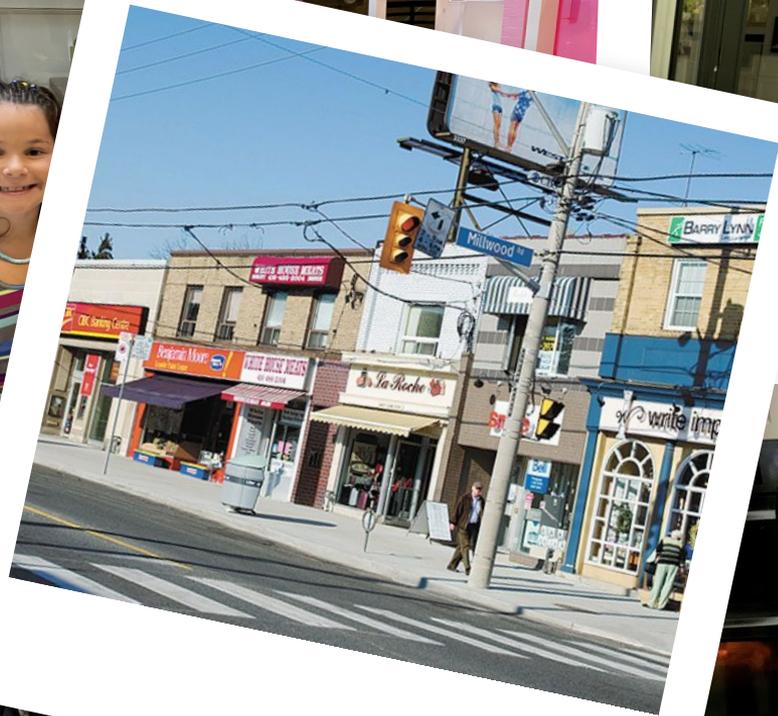
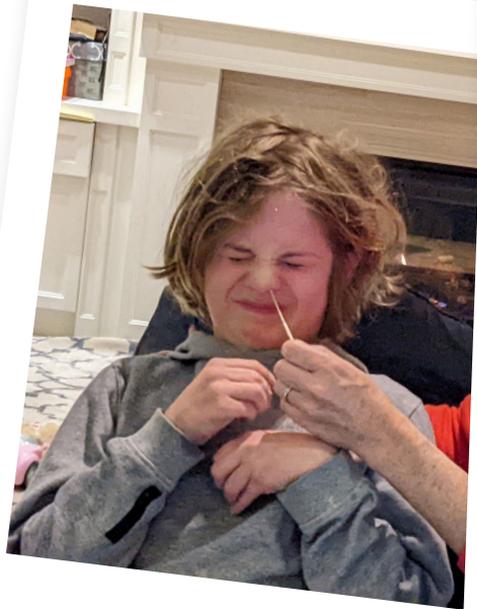


RCCSTORE

Navigating your 2022 Holiday strategy

Eric Morris
Managing Director & Head of Retail, Google









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



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

Modelling shows physical distancing still needed to prevent further spread

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



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

Feb 5, 2022

2020

[the Premier](#)



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

MAY 9 2022



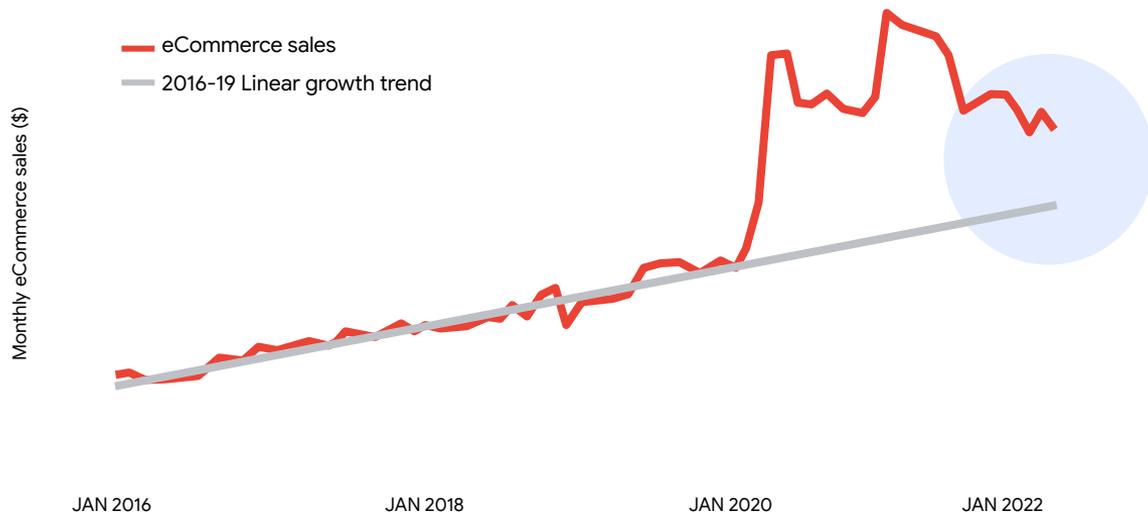
The Globe and Mail

This is how close Canada the pandemic

JUN 16 2021

Canadian retail has changed forever

Canadian retail eCommerce sales by month

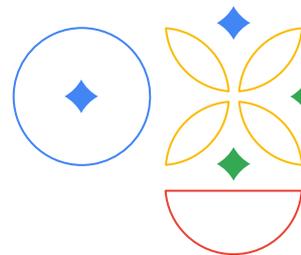


\$80B

2022 Total
eCommerce sales

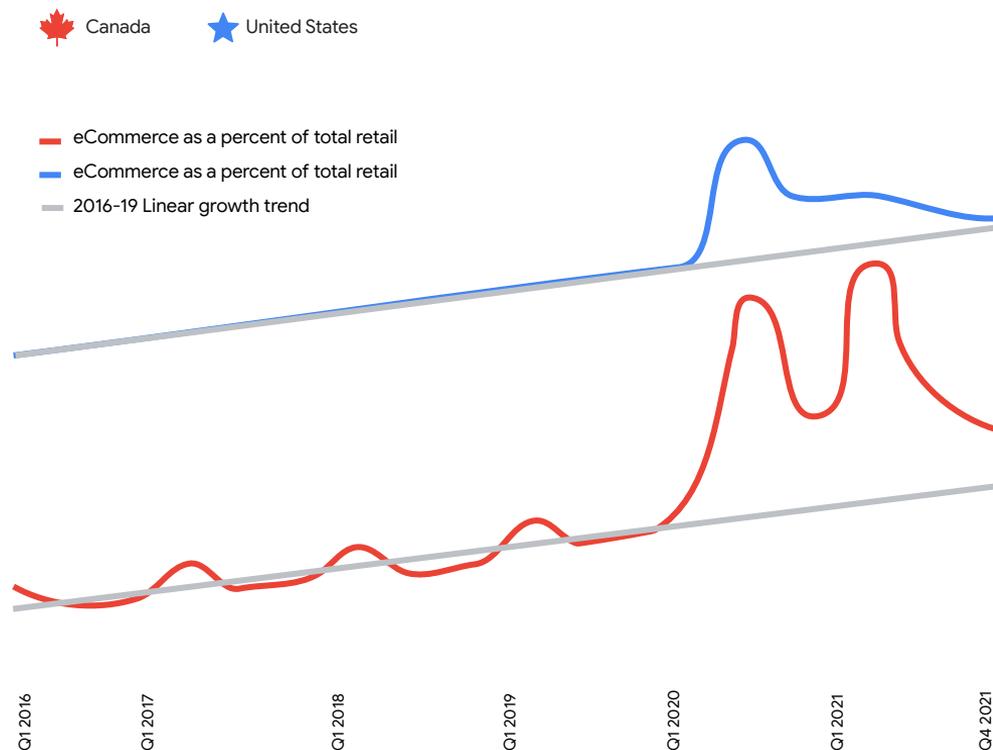
14%

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**

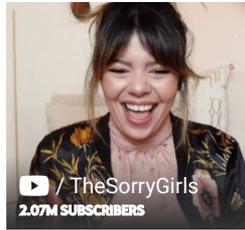
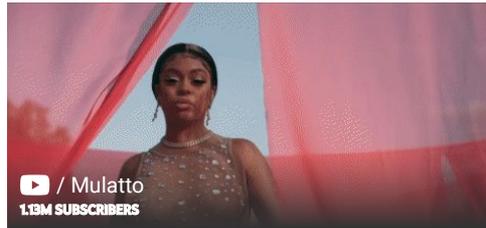
◆
70%

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

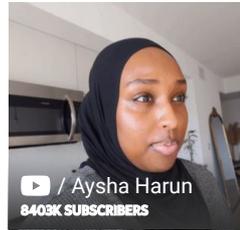
Where, how and what we watch has changed



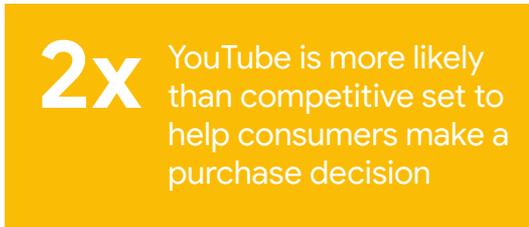
34% Increase in YouTube watchtime by viewers

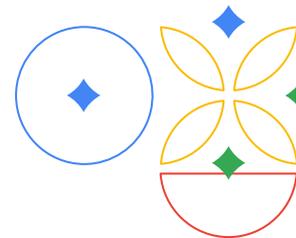


16M Canadians who watch YouTube on their TV



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**

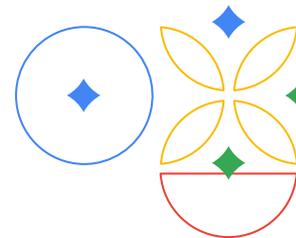
Q price match **7x**

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%

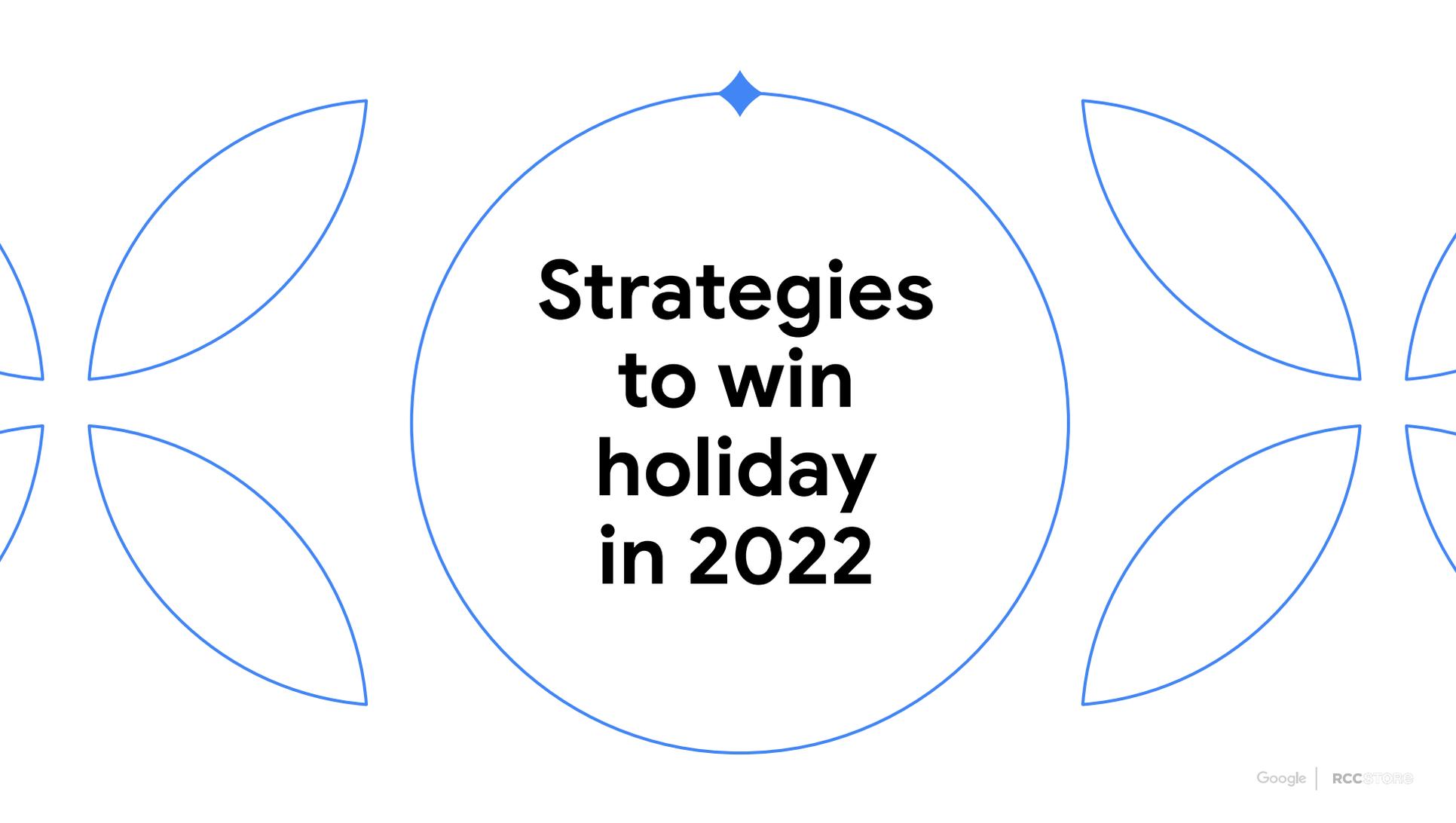
Q draw string

144%

Q Pants with elastic waist

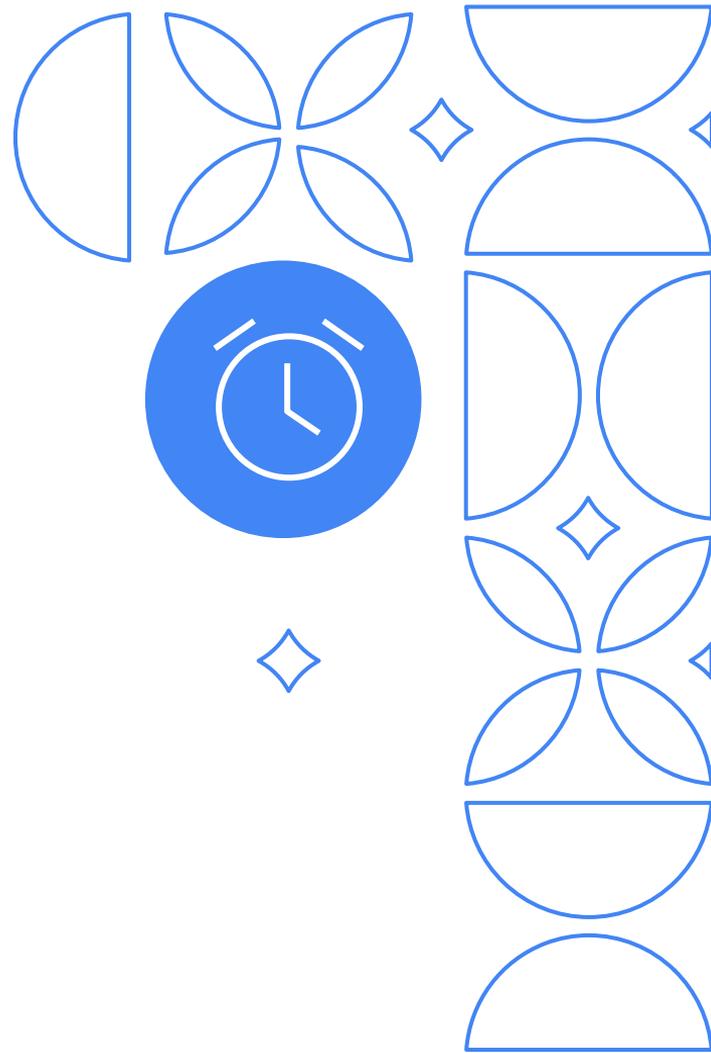
35%

Source: Google search data



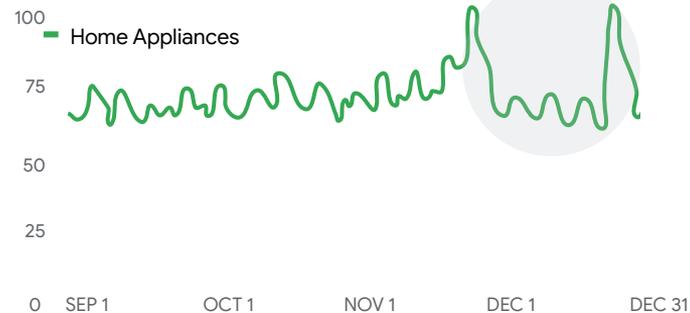
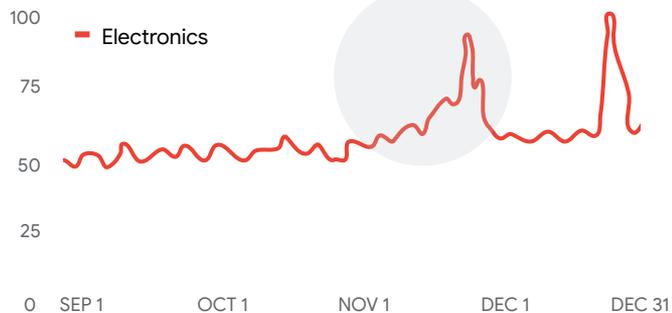
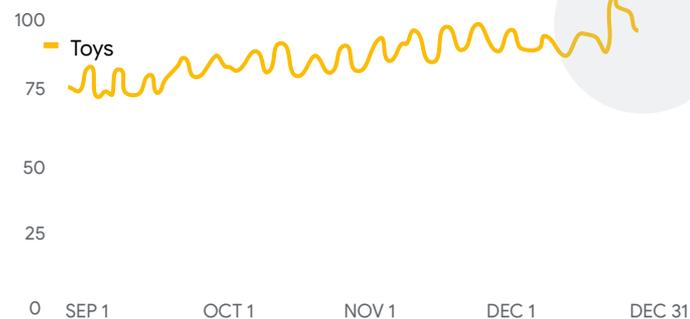
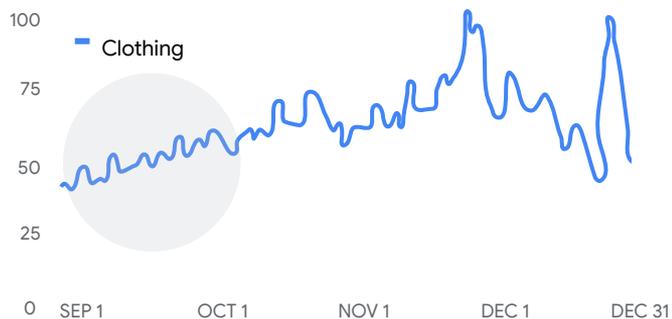
**Strategies
to win
holiday
in 2022**

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

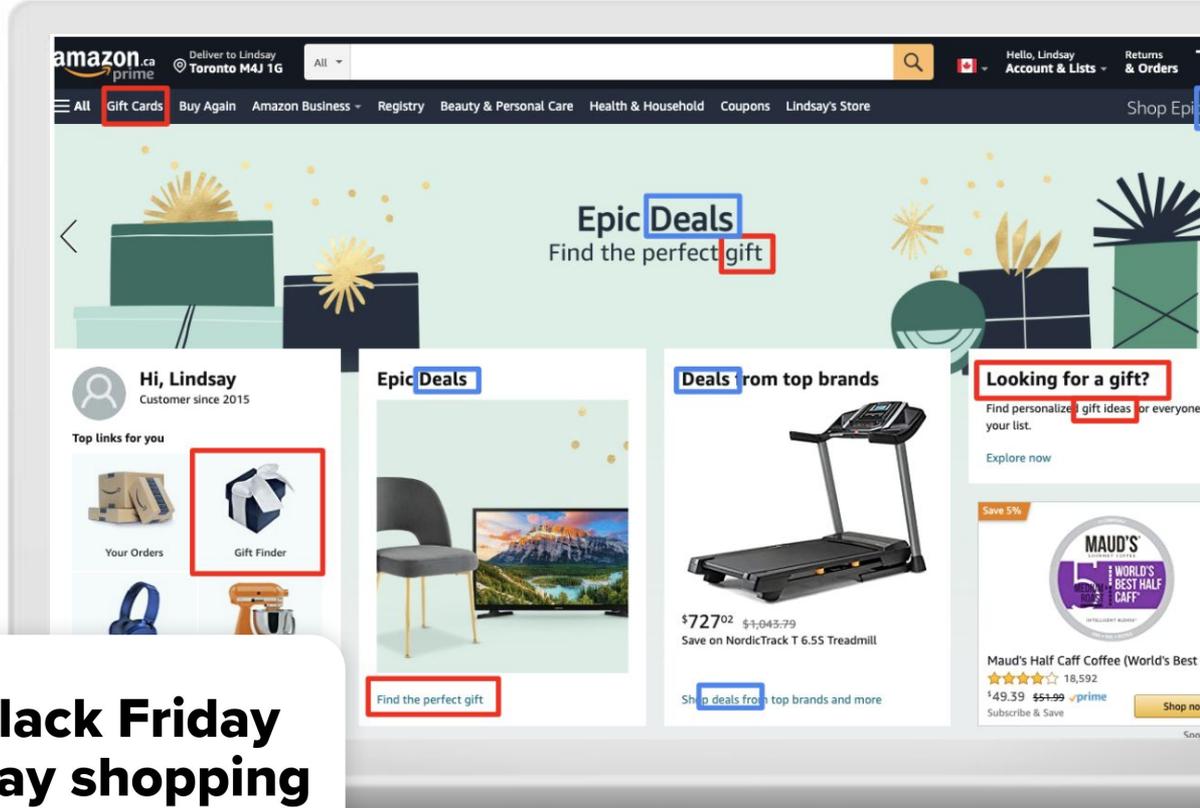


Holiday demand peaks by category

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



BEST GIFTS EVER

Shop Explore

LAYERS GONNA PLAY, PLAY, PLAY

They're way more than hoodies and vests, they're gear for scaling backyard Alps. Layer up in our best gifts ever.

Shop Gift Guide

FOR EVERYONE ON YOUR LIST

A big family means Rosaline Lawrence is always on her gifting game. Check out her faves for \$50 & under.

Shop Gift Guide

BEST BLACK FRIDAY EVER

Save up to 50%—use code BLACKFRIDAY for an extra 20% off select styles. Ends 11.27.

Shop

BEST BLACK FRIDAY EVER

New styles added. Save up to 50%—use code BLACKFRIDAY for an extra 20% off select styles. Ends 11.27.

Shop

Joint Venture

Shop New Arrivals

Shop Gifts & Accessories

COMING SOON App exclusive Early Access to Black Friday

This Magic Moment

This holiday season, give the gift of presence with the people and practices that allowed us to arrive here, now.

SHOP NOW



Favorite Styles In Stock & Ready to Ship

Make your holiday shopping quick and easy.

SHOP NOW

ATHLETA

Sale up to 60% Off

Staples, must-haves, and more—save big on styles you love.

SHOP GIRL SHOP WOMEN

ATHLETA

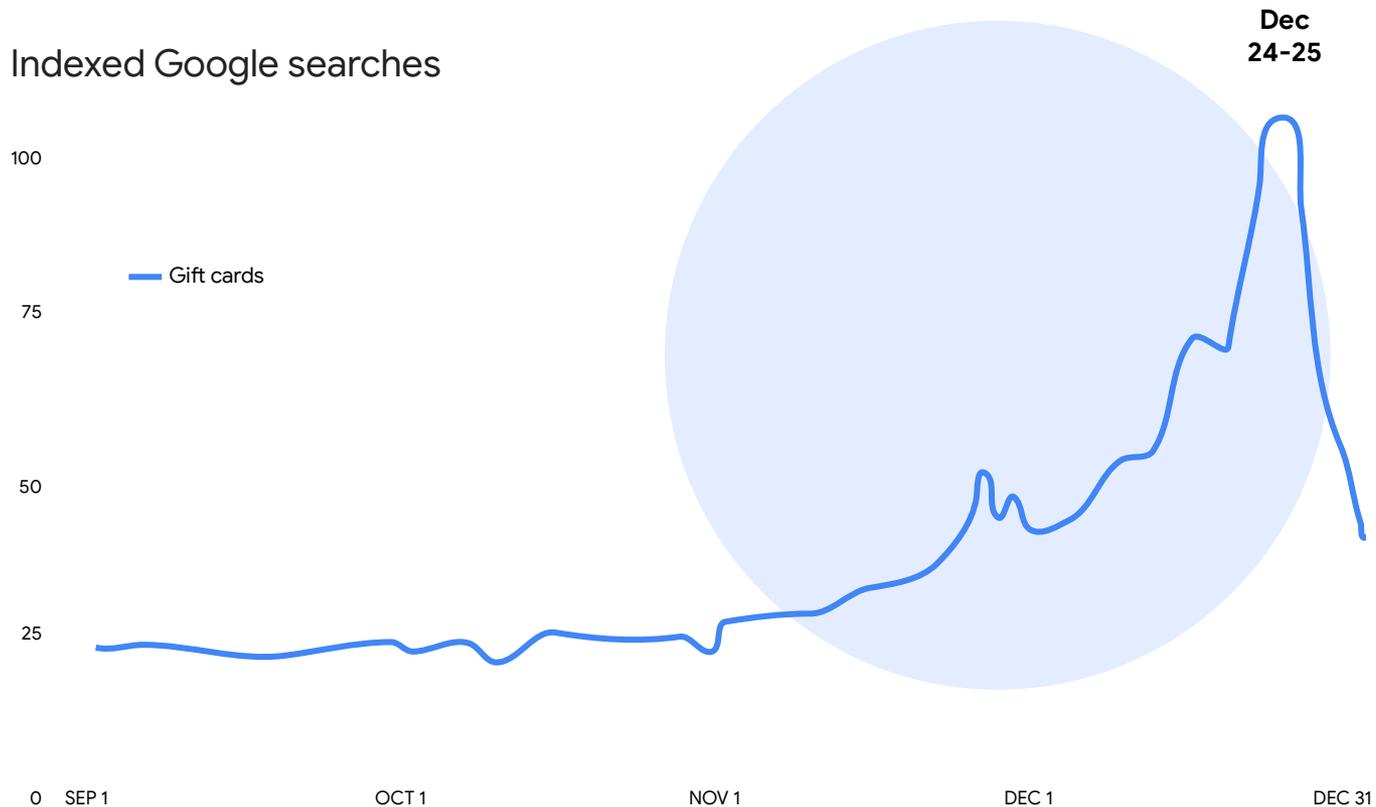
BLACK FRIDAY 20% Off YOUR PURCHASE

ENDS 11/26 No code needed.

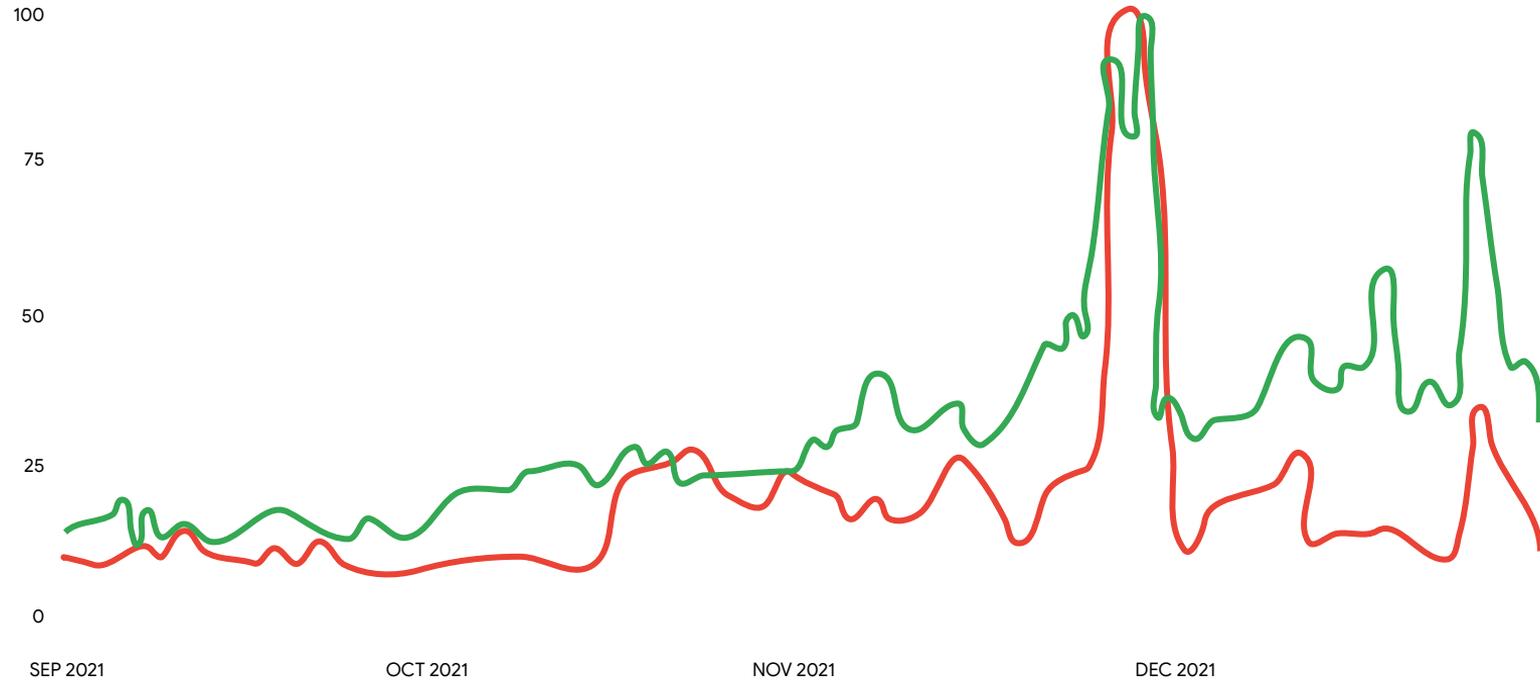
LUCKY YOU—NEW ARRIVALS ARE ON SALE TOO

SHOP WOMEN SHOP GIRL

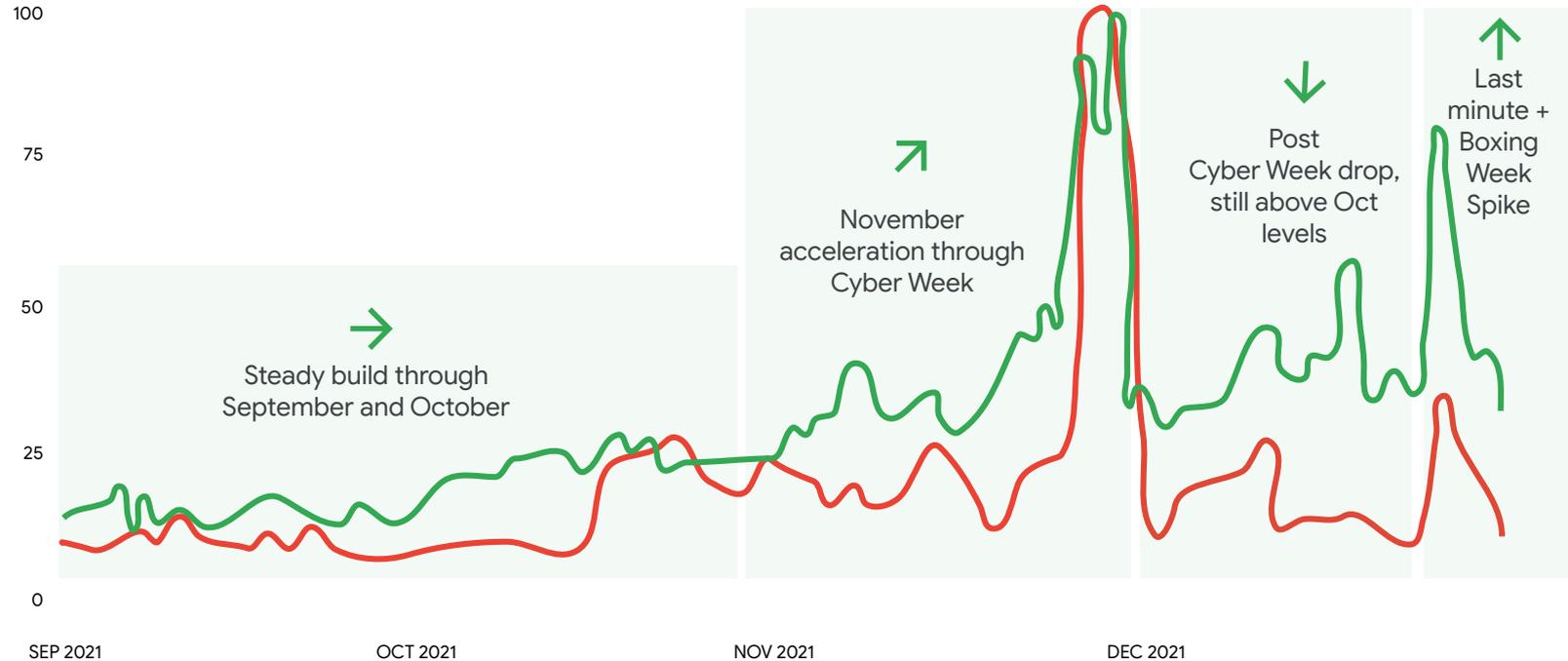
Gift cards are a last minute lifesaver but enter early



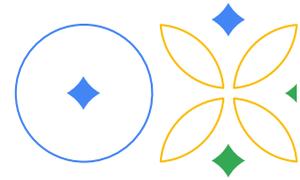
Two competing Retailers, capturing demand differently



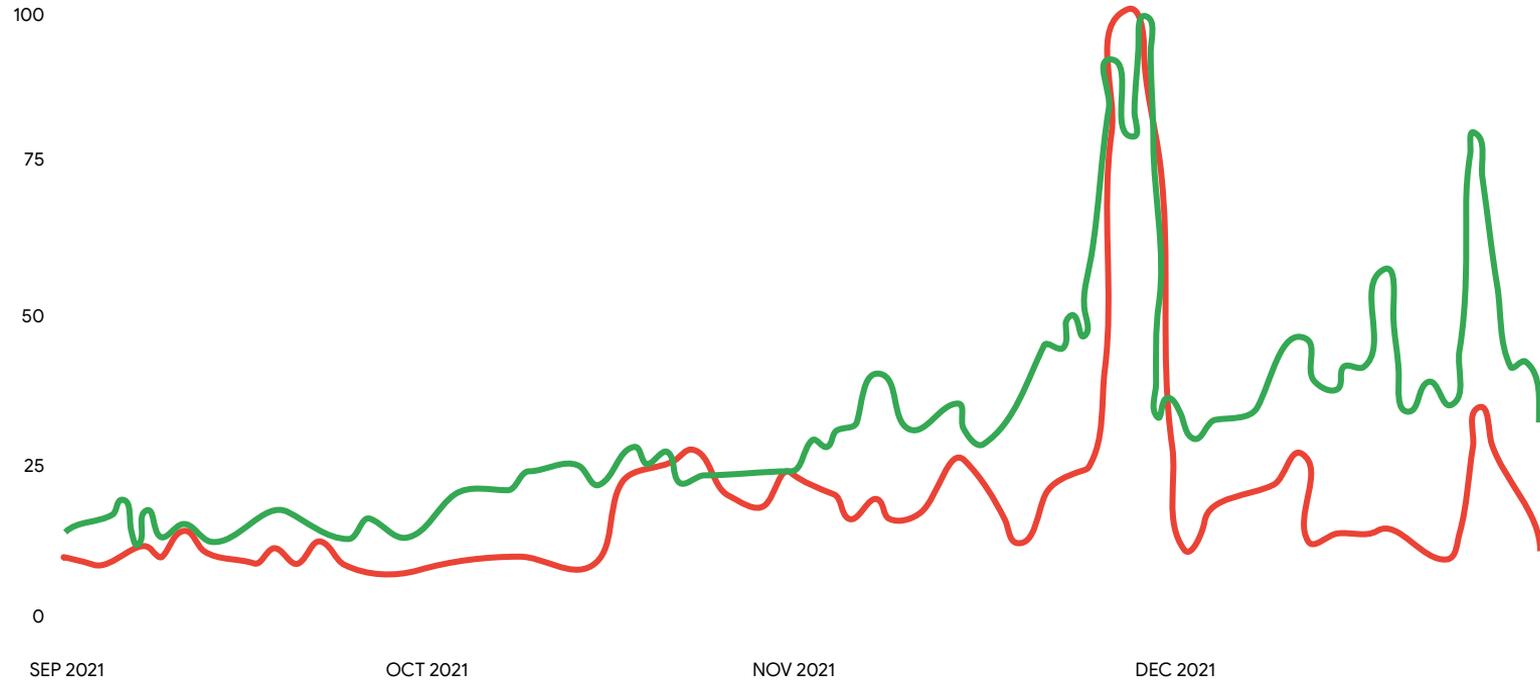
Two competing Retailers, capturing demand differently



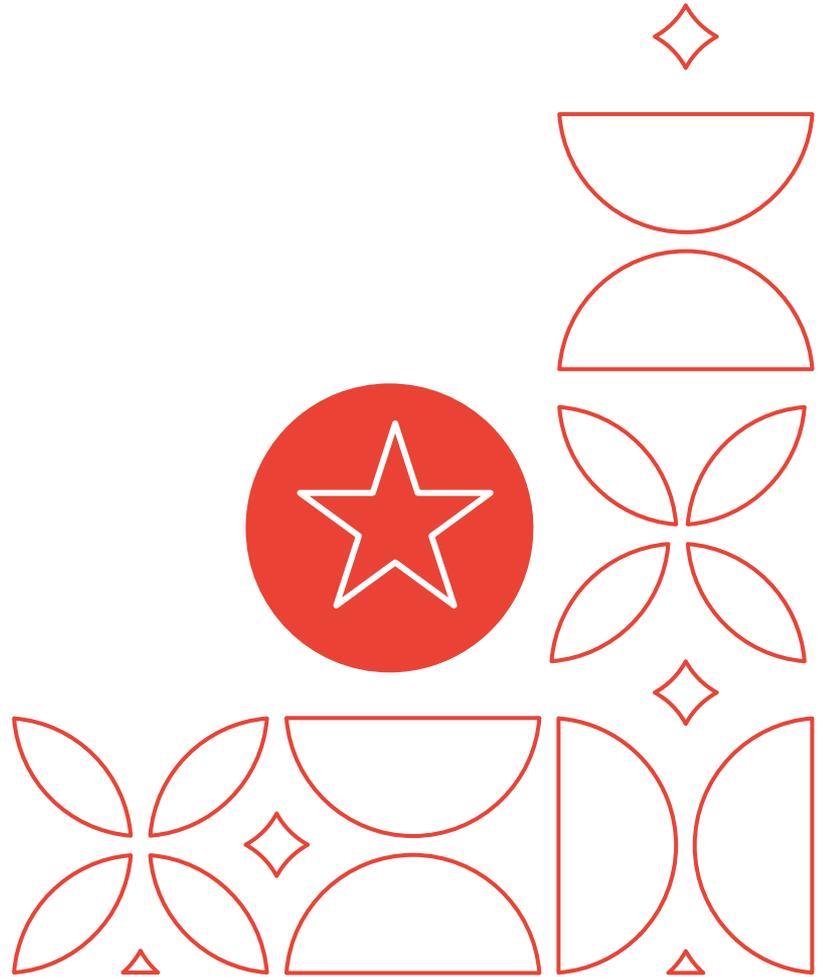
Two competing Retailers, capturing demand differently



Two competing Retailers, capturing demand differently



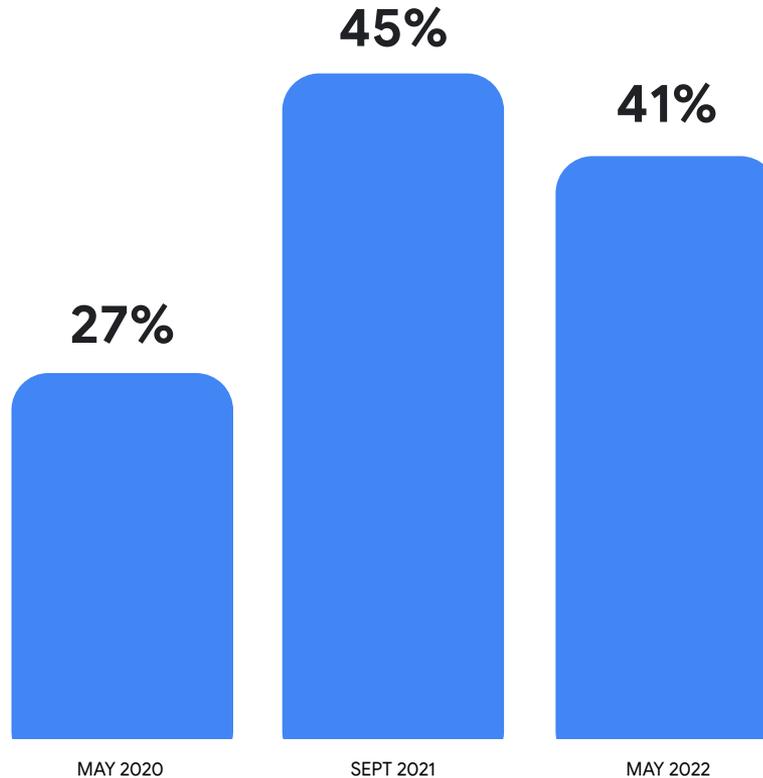
**Focus
on your
best
customers**





Canadians are less loyal and switching more than before

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



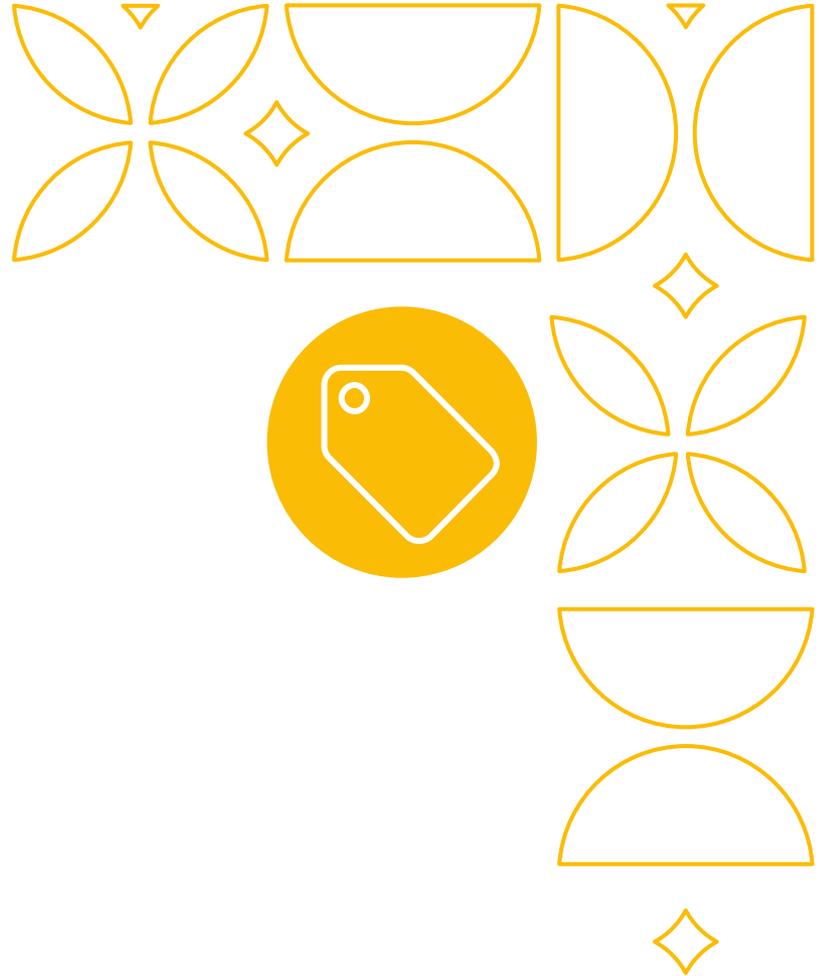
Protect your current high lifetime value customers

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



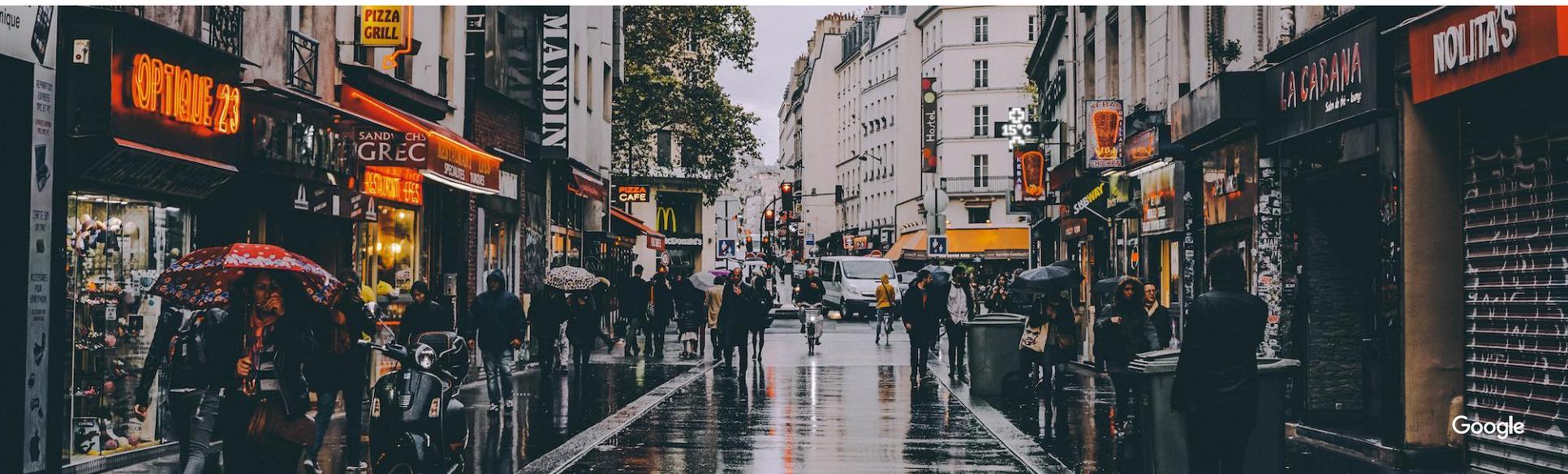
Deep
Learning

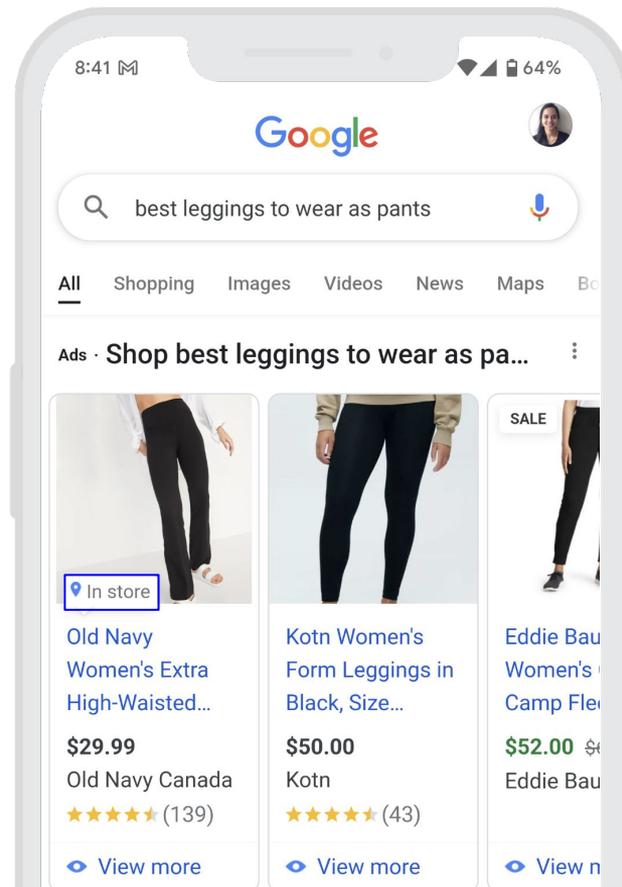
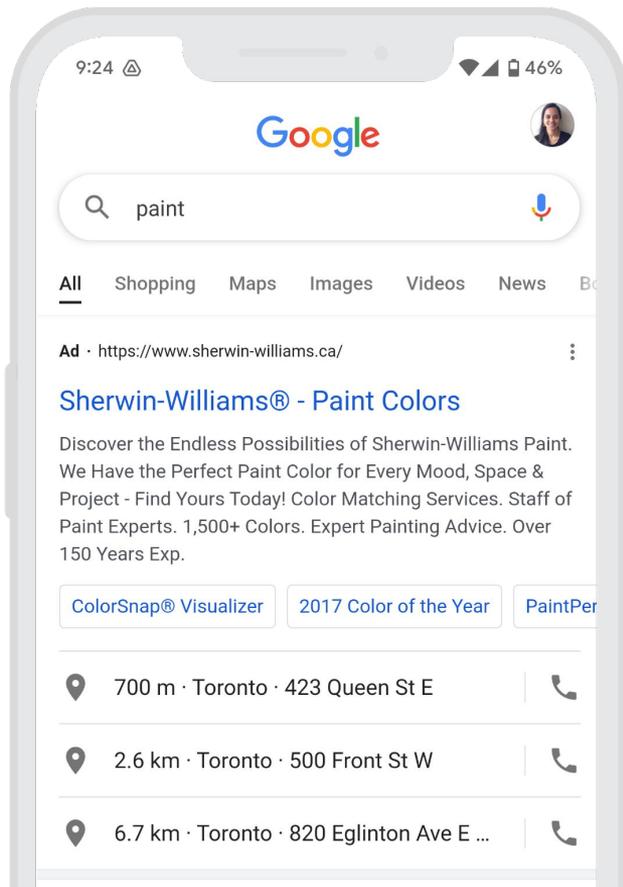


Survey
Verification



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	▲▲

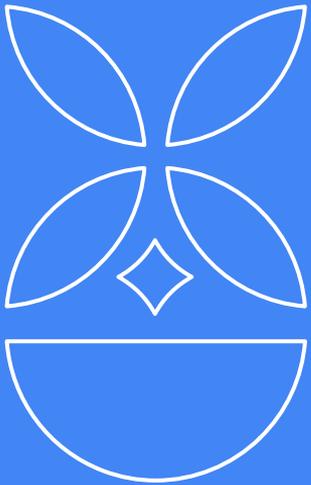
Canadian Benchmark: automatically optimizing to omni-sales

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

Mindset

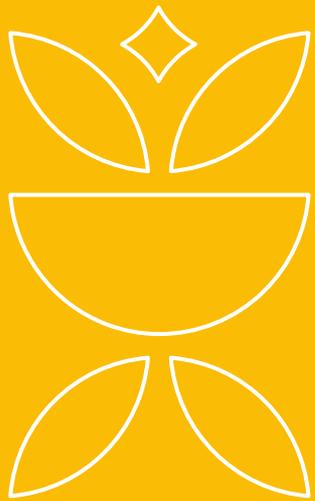


Set
ambitious
goals



Work
the puzzle
together

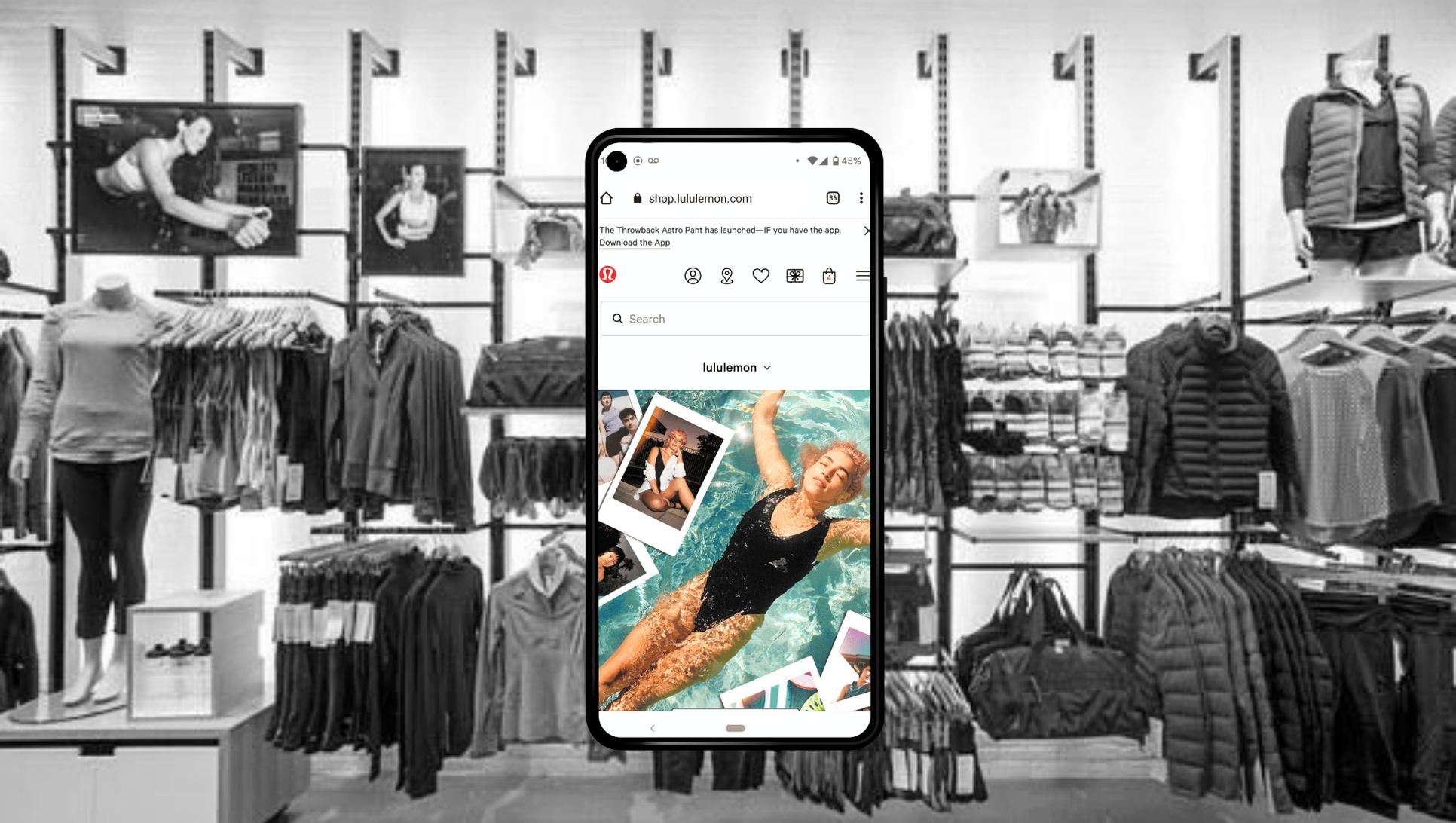




Progress



Perfection

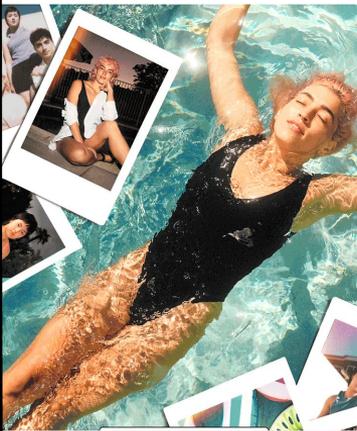


shop.lululemon.com 36

The Throwback Astro Pant has launched—if you have the app. Download the App

Search

lululemon ▾



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

