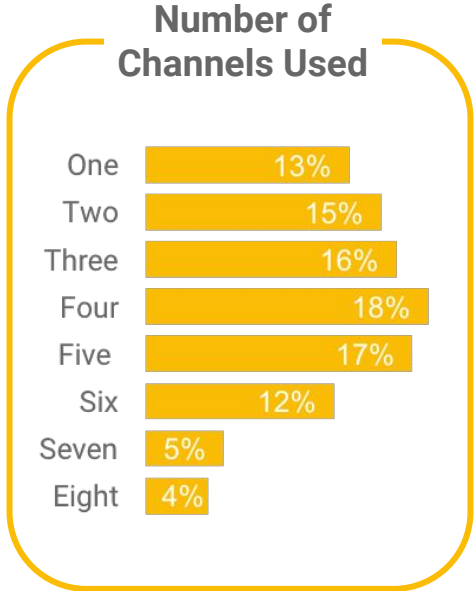
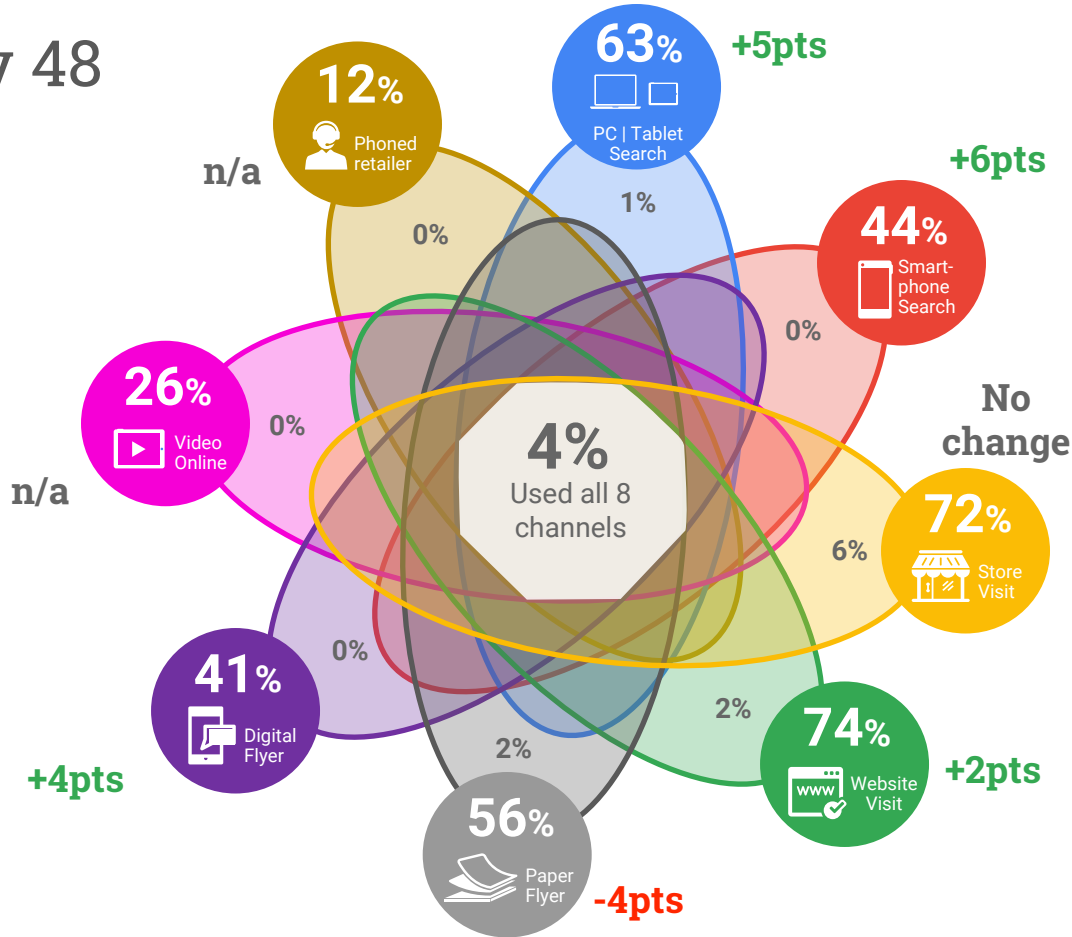


Google

A person wearing a green sweater is sitting at a wooden table outdoors. They are looking at a tablet computer. A smartphone is also on the table. To the right, there is a white cup of coffee on a saucer. The background is a blurred outdoor setting with greenery and a warm, golden light. The text "Focus on the user and all else will follow." is overlaid in white, bold, sans-serif font across the center of the image.

Focus on the user
and all else will
follow.

A busy 48 hours!



Source: Google/Ipsos Canada Shopping Study. Base; Holiday Shoppers using 1+ channel, 2016 n=2,730, 2015 n=1950.
 Q: "How many times in the past 48 hours have you conducted each of the following shopping activities?"

What is omni-channel?

om·ni·chan·nel

/ˈäm-nə-ˌCHanl/

adjective

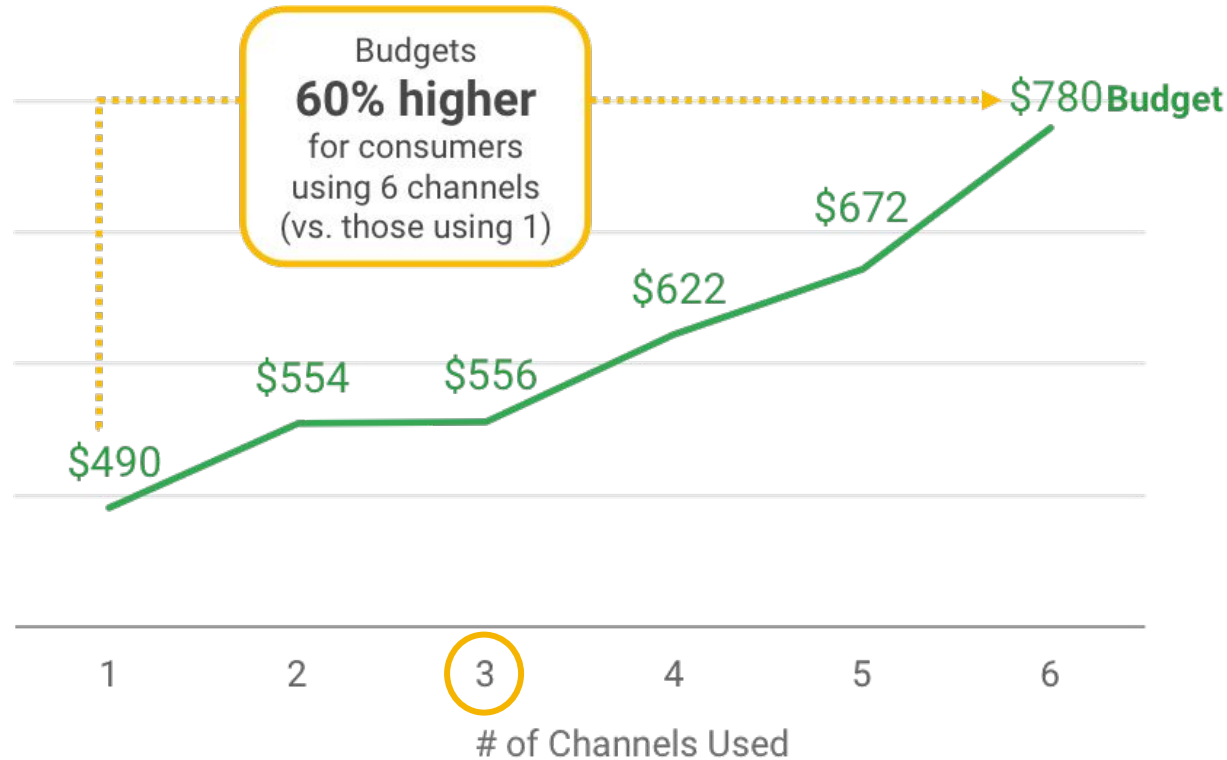
adjective: **omni-channel**

denoting or relating to a type of retail that integrates the different methods of shopping available to consumers (e.g., online, in a physical store, or by phone).

Origin

early 21st century: from **omni-** 'all' + **channel**.

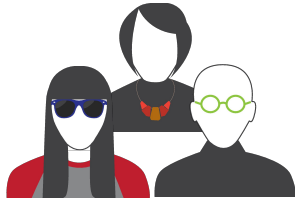
Omni-channel shoppers spend more



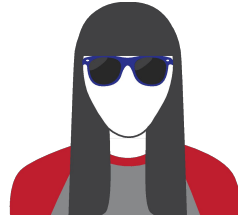
Source: 2015 Google Canada Shopping Study, Ipsos. Base: Holiday Shoppers - using 1 channel n=246, 2 channels n=387, 3 channels n=381, 4 channels n=459, 5 channels n=310, 6 channels n=166.

The omni-channel future is here

Number of Shopping Channels Over the Past 48 Hours (Holiday Shopping Season)



Overall
(18+)



Millennials
(20-34)



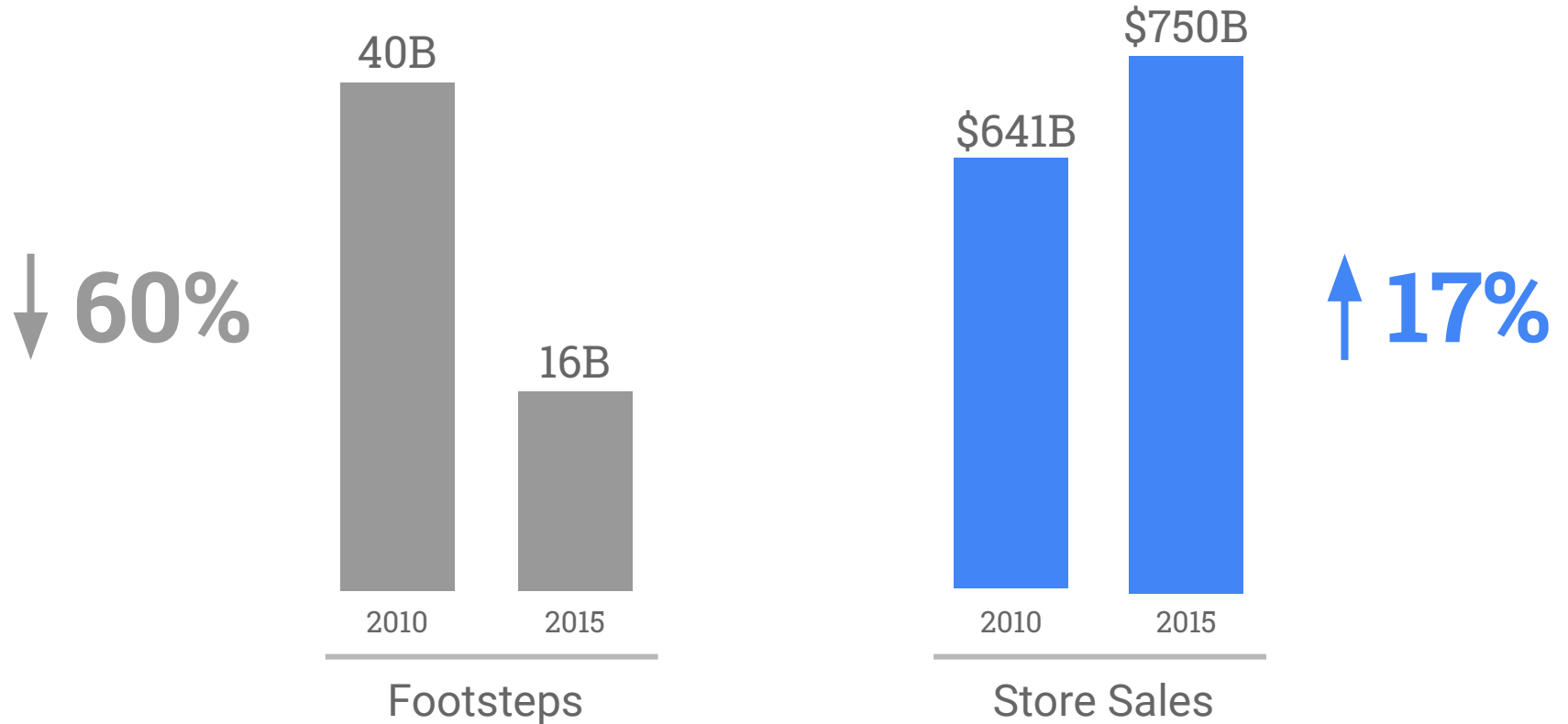
Gen X
(35-51)



Boomers
(52-70)

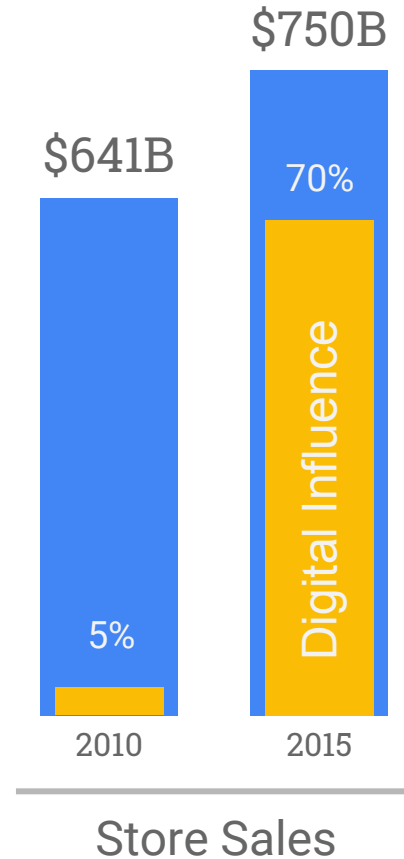
3+	72%	79%	74%	67%
4+	56%	62%	59%	50%
5+	38%	43%	40%	32%

What's happening with U.S. retail?



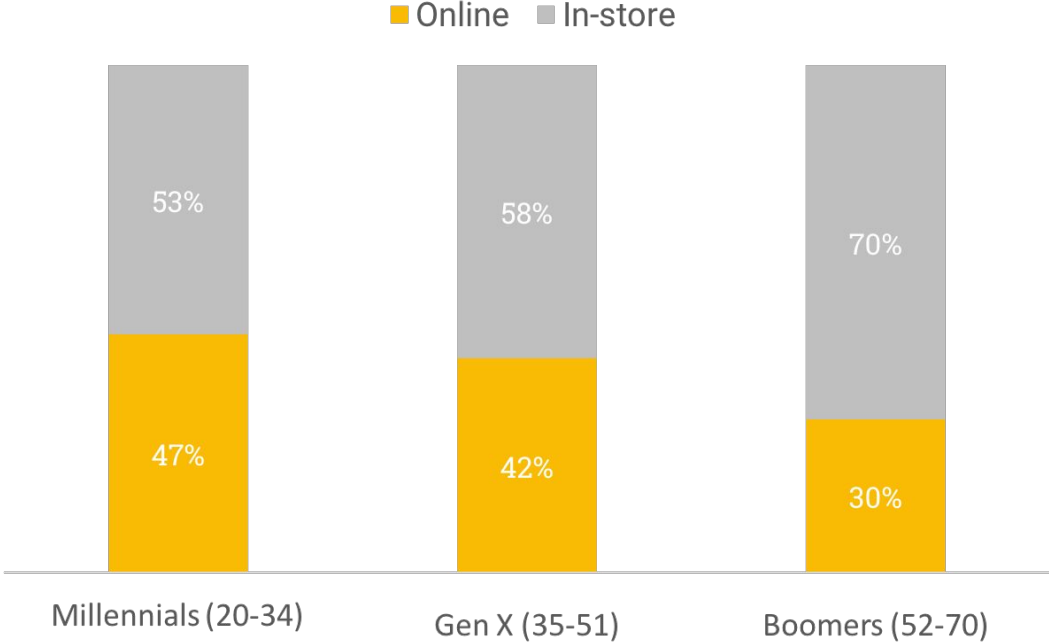
Footsteps are moving online

In-store shoppers are more *purposeful* shoppers.



Nearly half of Millennial time spent shopping is online

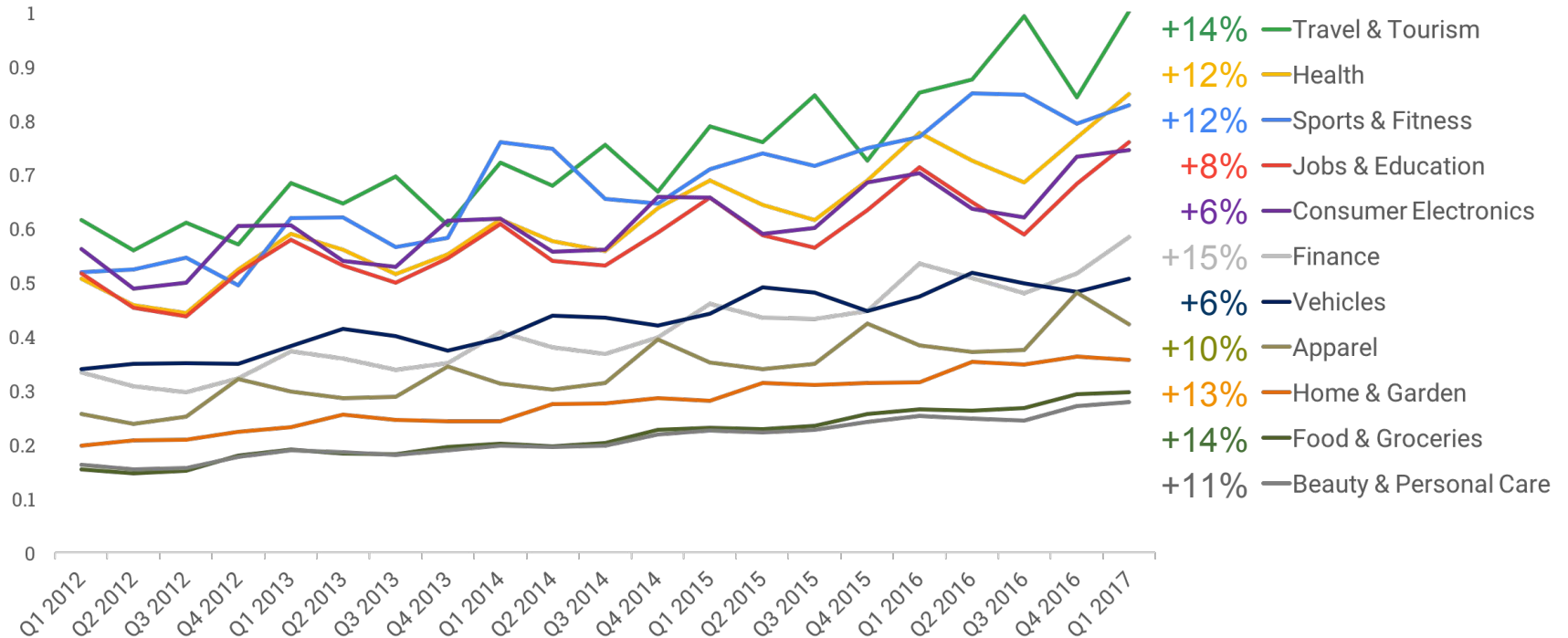
Time Spent Shopping (Online vs. In-store)



Source: 2016 Google Canada Shopping Study, Ipsos. Base: Holiday Shoppers, n=2730.

Strong online demand in all categories

Search query growth by category



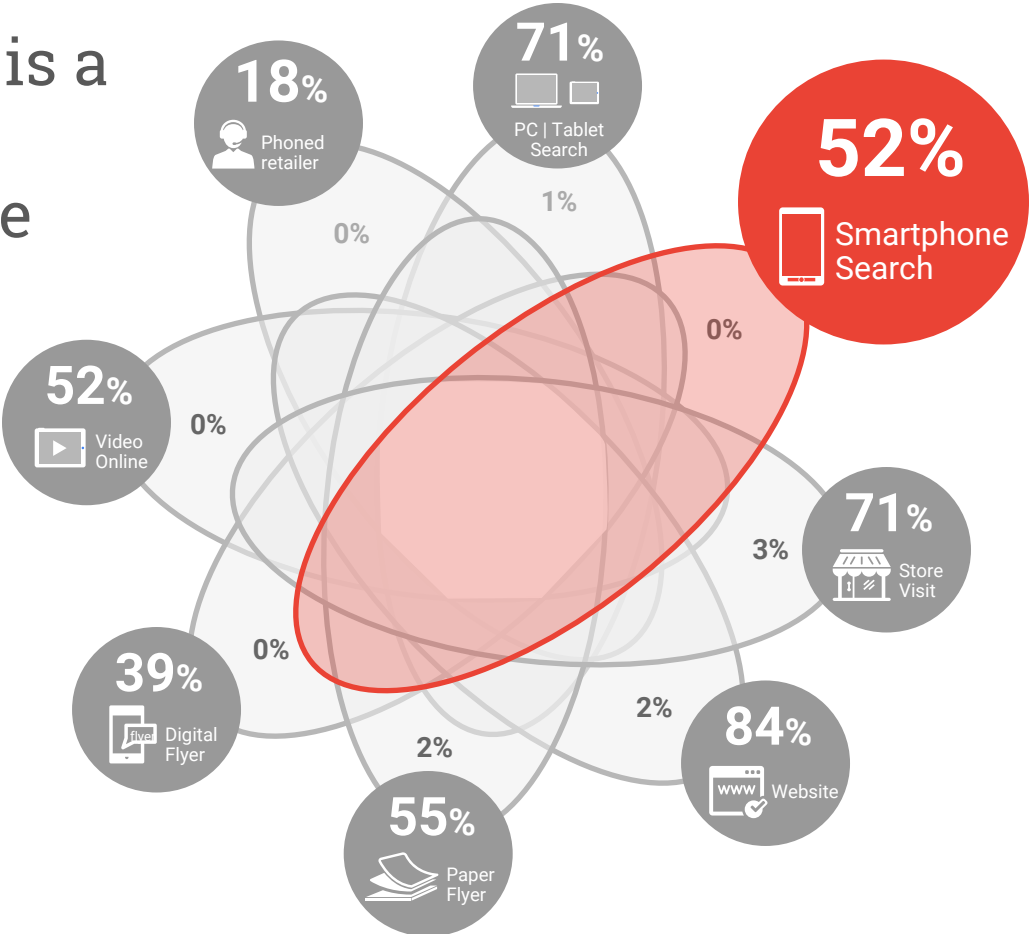
Source: Google internal search query data.

Cross-channel measurement is key



Your customers are already
omni-channel, even if you're not.

Shopping is a mobile experience




Source: 2016 Google Canada Shopping Study, Ipsos. Base; Spring Shoppers using 1+ channel, n=2,731.

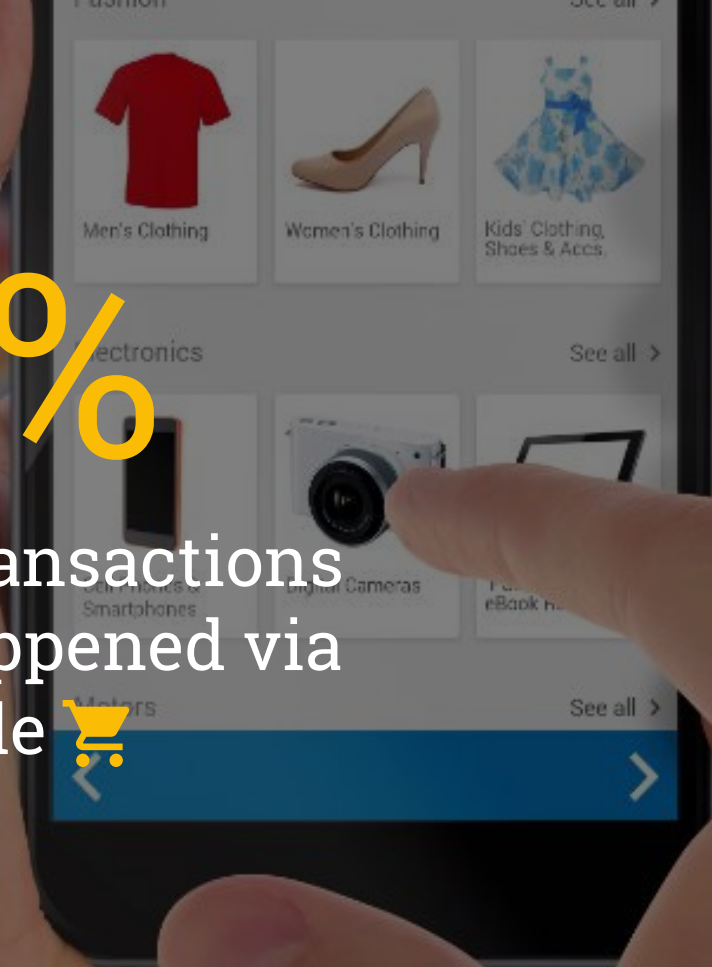


26%

Canadians use their
smartphone
in store 🏪

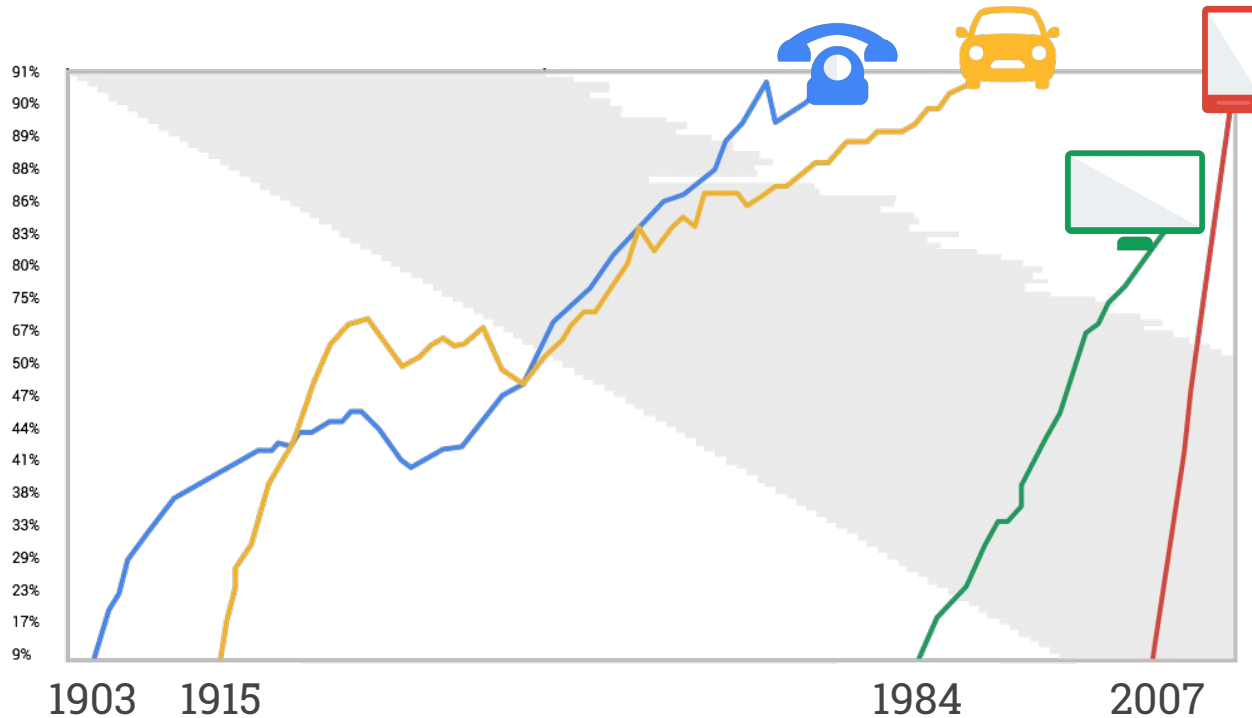
33%

of all online transactions
last Spring happened via
mobile 



Speed of adoption will impact expectations

Adoption Rates of Consumer Technologies in the U.S. (10% to 90% penetration)



A woman with dark, curly hair is wearing a vibrant, patterned headscarf in shades of pink, blue, and yellow. She is lying on her side on a wooden surface, looking intently at a smartphone held in her right hand. The background is a soft, out-of-focus indoor setting.

mo·bile mo·ment

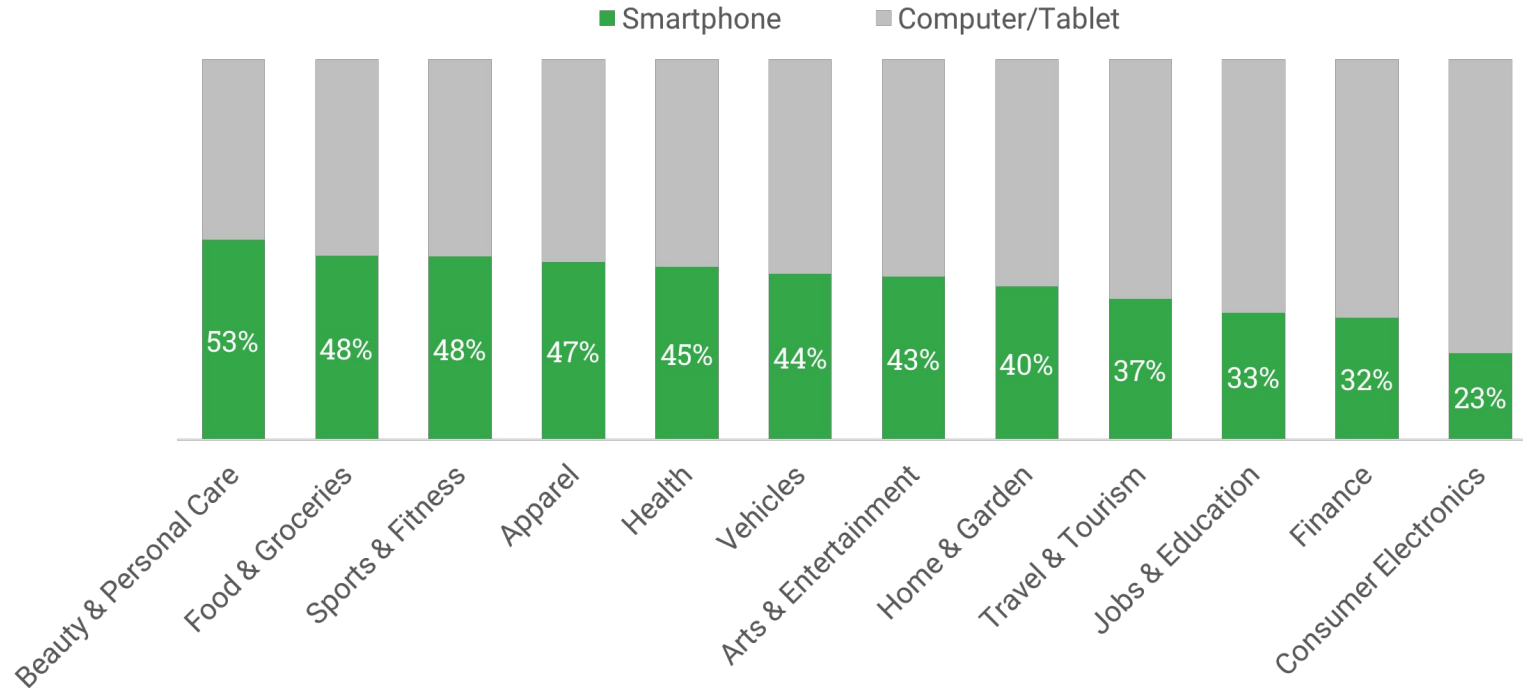
noun

'mōbəl, 'mō ,bīl/ 'mōmənt/

1. Where mobile searches surpass combined desktop & tablet searches

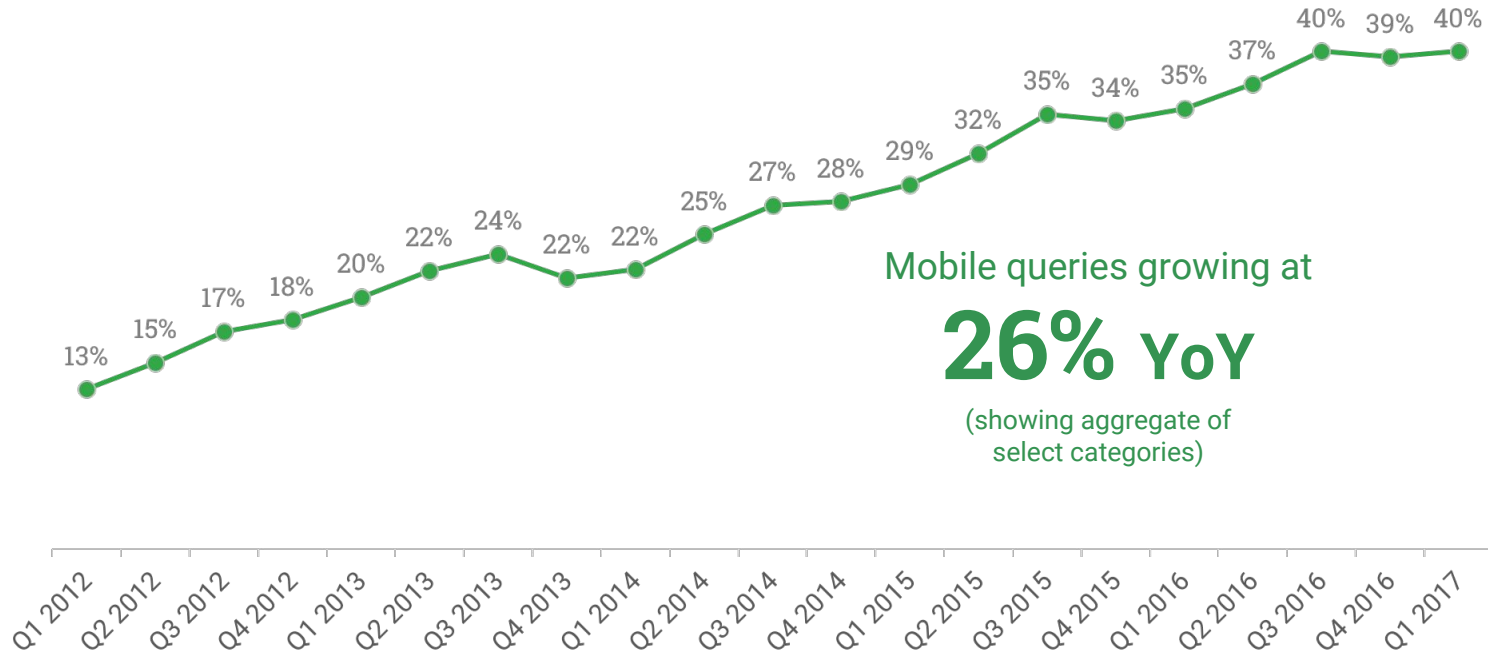
Have you had your mobile moment?

Search queries by category (Q1 2017)



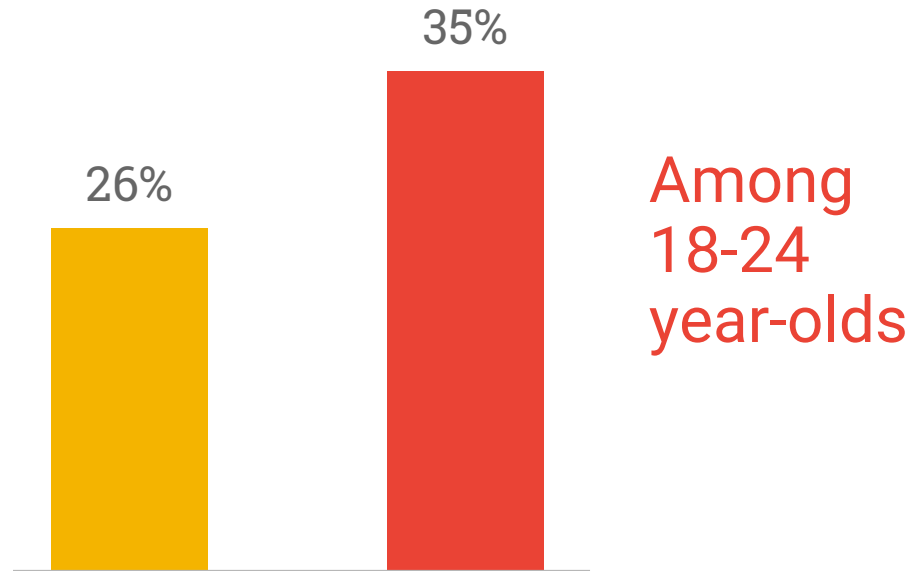
Online demand is driven by mobile

Percentage of search queries via smartphone



Some are opting for “mobile only”

Laptops or desktops will **not** be replaced when they no longer work





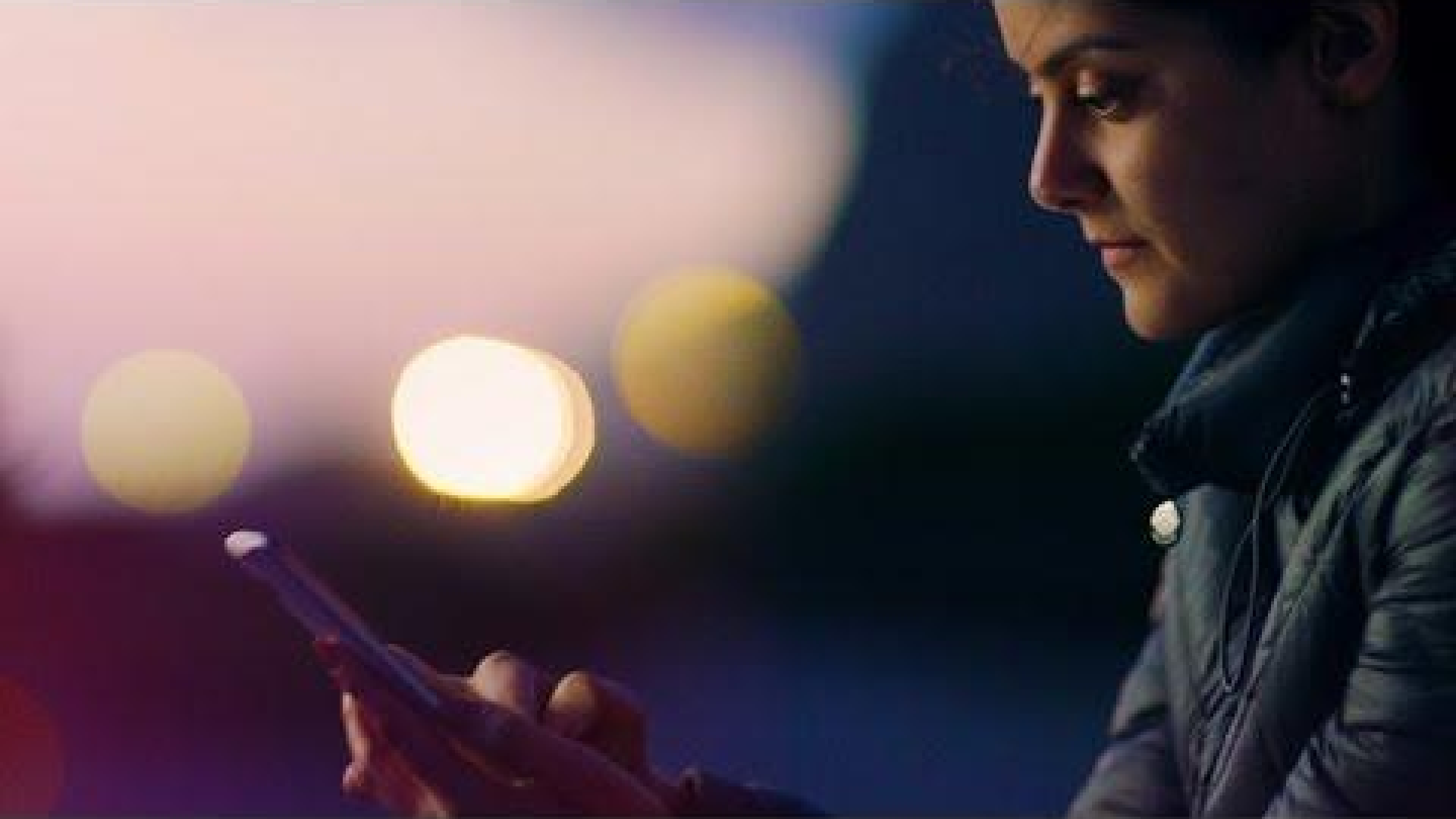
**First moment
of truth**



**Zero moment
of truth**



**Micro-
moments**

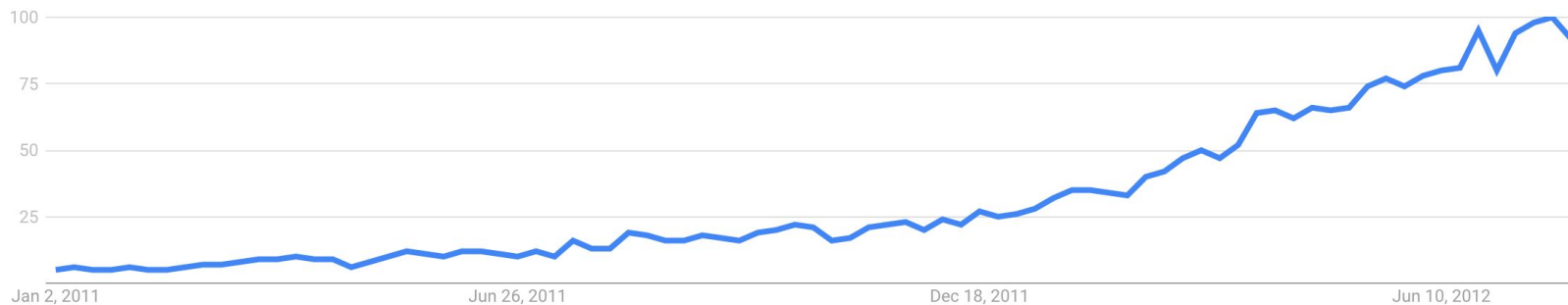




**I-WANT-THAT-HAIR
MOMENTS**

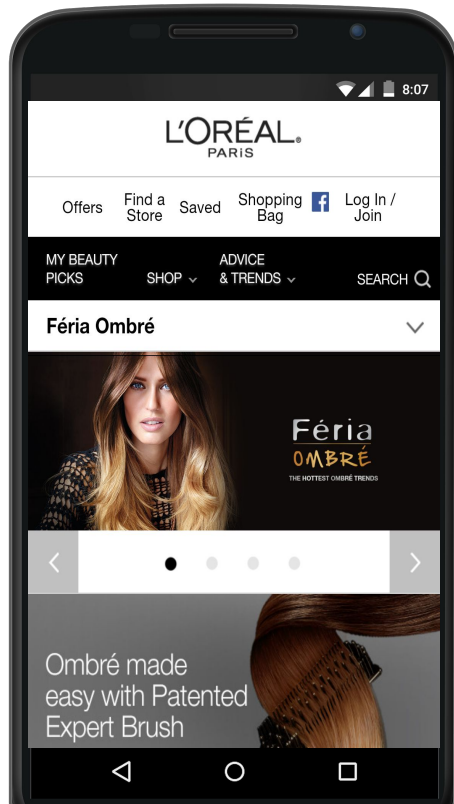
Growth in ombre hair

Interest over time ?





L'Oréal uncovers an untapped consumer need and open an entire new market



50%

of Féria Ombré consumers
were new to the category

Built **Hairstyle.com** to give
inspiration and education
for hairstyles by occasion

Source: Think With Google L'Oréal case study, "L'Oréal Paris Discovers the Beauty of Search for Building Brand Love," June 2014.

Google

A young couple is walking through a Best Buy electronics store. They are looking at a display of televisions. The woman is wearing a white t-shirt and blue jeans, and the man is wearing a blue jacket and blue jeans. The store is filled with various electronic products, including televisions and laptops. The text "I-WANT-TO-USE-MY-NEW-TOY MOMENTS" is overlaid on the image.

I-WANT-TO-USE-MY-NEW-TOY
MOMENTS



www.google.com/shopping/product/146359/

**BEST
BUY**

digital camera

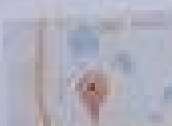


Nikon D3300 DSLR Camera with 18-55mm
and 55-200mm VR II Lenses - Black

Compare to: **\$499.99**

Shipping and handling charges apply.

★★★★★ 4.2/5 (1,234 reviews)



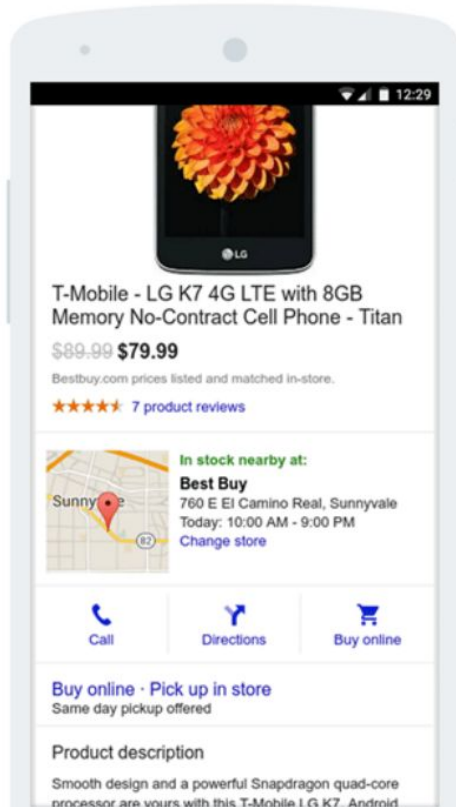
in stock nearby at

Best Buy

1943 County Road 22, Houston

Today, 10:00 AM - 8:00 PM

Best Buy goes omni-channel to meet customers' needs and drive people in-store



1 mill

additional store visits by focusing on local search

44%

increase in clicks to BestBuy.com

“Today, a customer could come in our store and say, ‘I want to stream photos from my SLR camera onto my television.’ **That’s a new problem.** That’s not something we’ve had to solve before. For us, **it’s really important that we’re there in those moments of need to provide the answer**” to their question.

Greg Revelle
Chief Marketing Officer,
Best Buy US

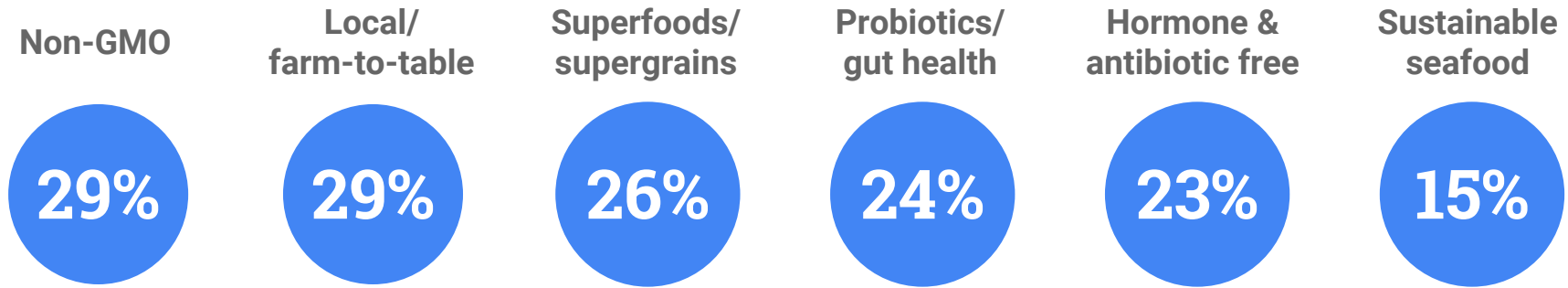
Source: Think With Google Best Buy [case study](#), “Best Buy Draws Customers In-Store with Mobile” July 2016.

Google

A woman is shown from the side, wearing a patterned sleeveless top, holding a black smartphone in her hands and looking at the screen. She is pushing a red shopping cart with a white metal frame. The background consists of white shelves stocked with green and yellow boxes, likely in a grocery store. The text "WHAT'S-IN-THIS MOMENTS" is overlaid in white, bold, sans-serif font in the center of the image.

WHAT'S-IN-THIS MOMENTS

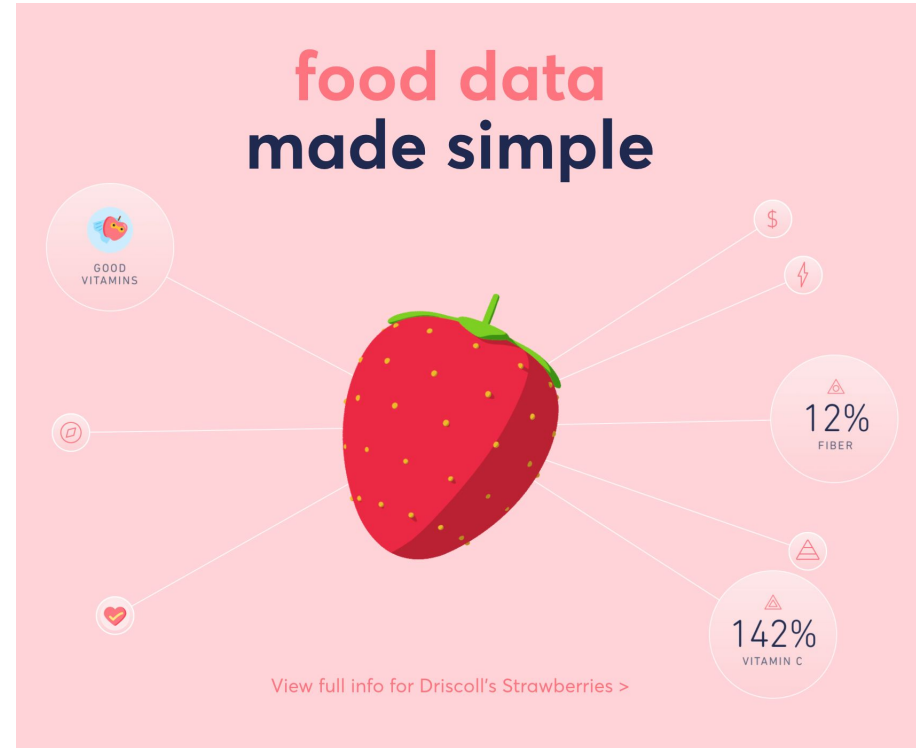
Young parents want to know what's in their food



Products have stories; Sage aims to tell them

“ The current food label is just a data dump of information. [...] There’s a certain type of new brand in store that actually wants to communicate this sort of information to their customers. And they haven’t ever really had a good tool to do that. ”

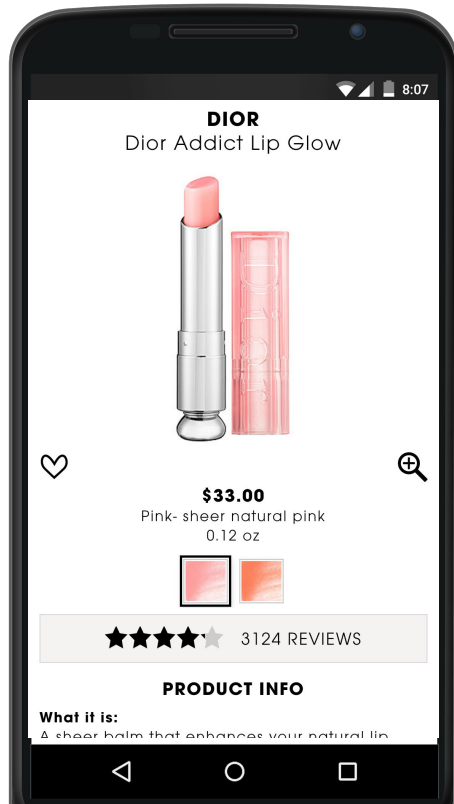
- Sam Slover,
Founder, Sage Project





WHICH-ONE-IS-THE-RIGHT-ONE
MOMENTS

Sephora uses mobile as a personal shopping assistant



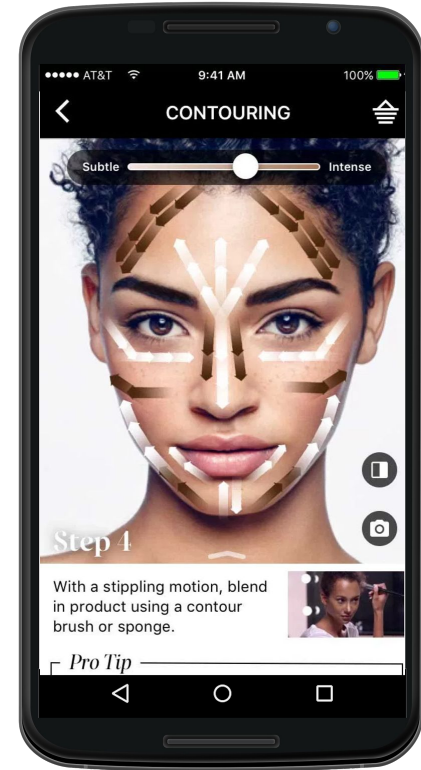
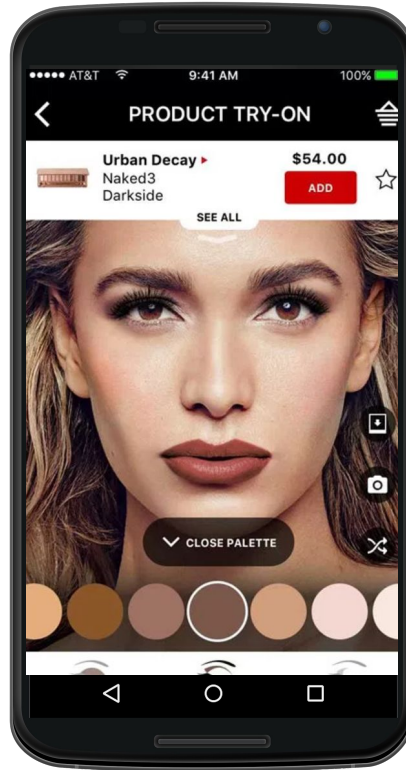
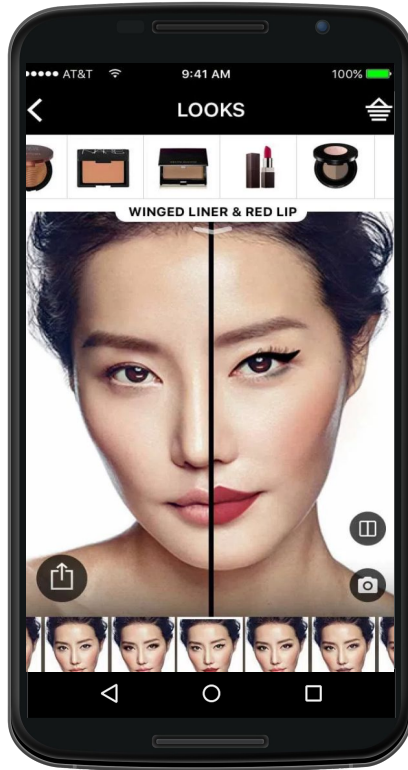
“ Looking ahead, Sephora will continue to invent omni-channel experiences on mobile that turn her phone into a truly personal shopping assistant for women on-the-go, as well as those standing in our stores. ”

- Bridget Dolan,
VP, Sephora Innovation Lab

Source: Think With Google Sephora case study, “Sephora Turns Smartphones Into Local Store Magnets,” October 2014.

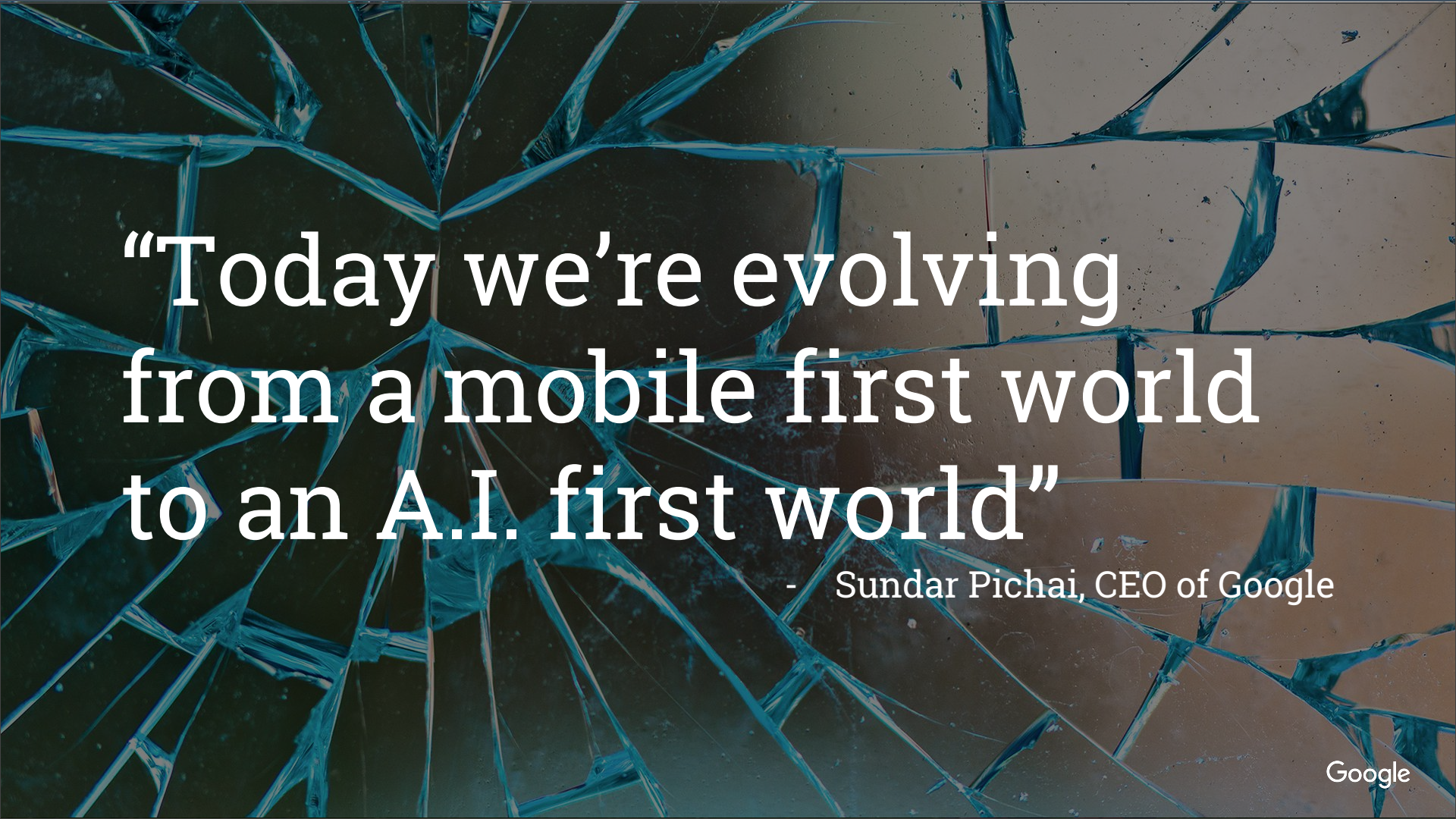


Sephora's AR lets you try virtual makeup on at home



Customers will expect their mobile and store experiences to be connected.

Brands can use digital signals to learn more about customer needs.



“Today we’re evolving
from a mobile first world
to an A.I. first world”

- Sundar Pichai, CEO of Google

This didn't happen overnight



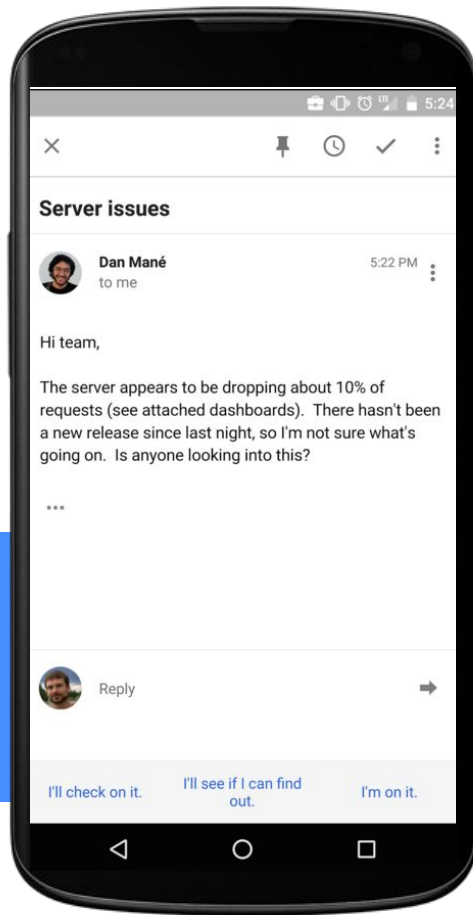
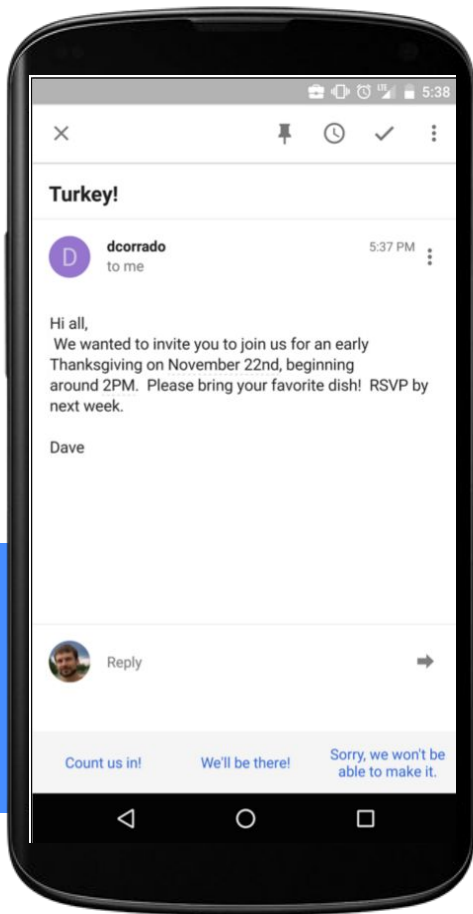
Google Translate
Over 1B
translations in
103 languages
daily



Google Photos
lets you search
for the right
photos



Gmail
10% of people use
"Smart Reply" to
suggest short
responses on
mobile





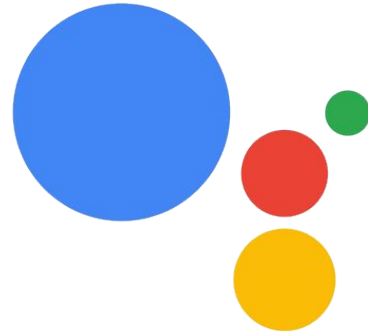
Translate

Text, graphic and speech translation

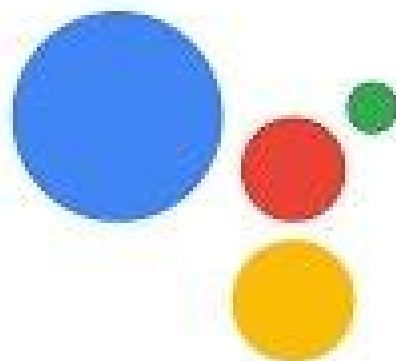


Consumers are ready for smart assistants

20%
of searches on
Google's mobile app
are voice searches



Hi, how can I help?



Hi Aimee, how can I help?

Why does it matters for brands and retailers?

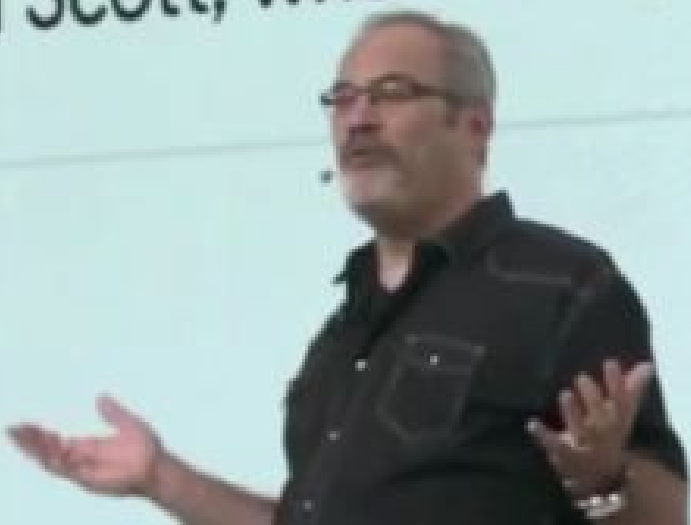




Janey



Hi Scott, where are you headed?



help me book a hotel room

@rogers move my services to my new address

What is my credit card balance?

How is my stock portfolio doing?

@Headspace start meditation

@FoodNetwork let's make french toast

@WebMD what are s

Can we do Karaoke?

@loblaws add onions and cheese to my click-and-collect order

I wan

s?

@sportchek which store has my size?

@CNN top headlines

I want to exercise

I need a movie re

playlist

Are there any coupons I can use here?

best 60" 4K TV under \$2,000?

Is my prescription ready?

I want to e

aking

Resume Radiolab

I want to buy groceries

tell me when paper towels go on sale

ask @Uber to get me

is there cheese in the fridge?

I need a car here

I want to pay my phone bill

@Busuu I want a new Spanish lesson

my bank balance?

@l'oreal what's my eyeshadow colour?

What is my horoscope for the day?

What is my reci

Create next generation shopping experiences



Ok Google, order paper towels.

Alright, last time you got [Bounty Paper towel, 12 Rolls]. I can get it from [Target] for [\$12.99]. Should I order that?

Your personal shopping assistant

Knows the basics

Remembers preferences

Drive discovery

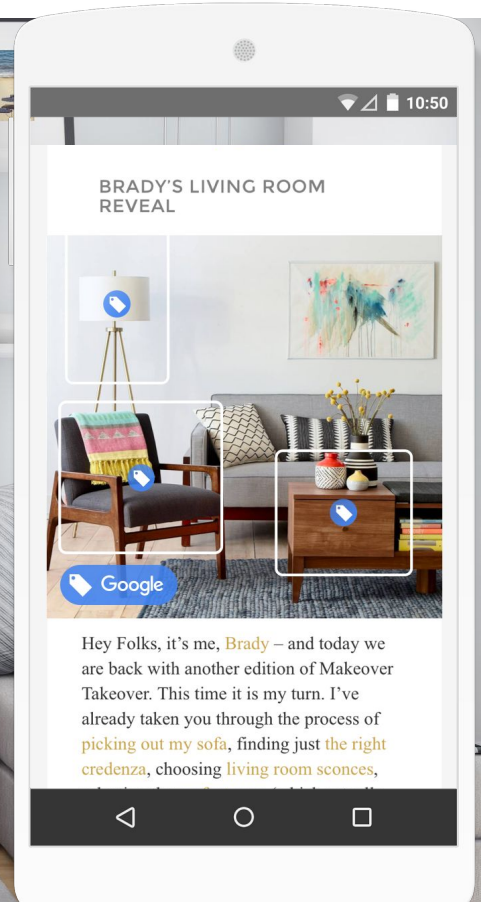
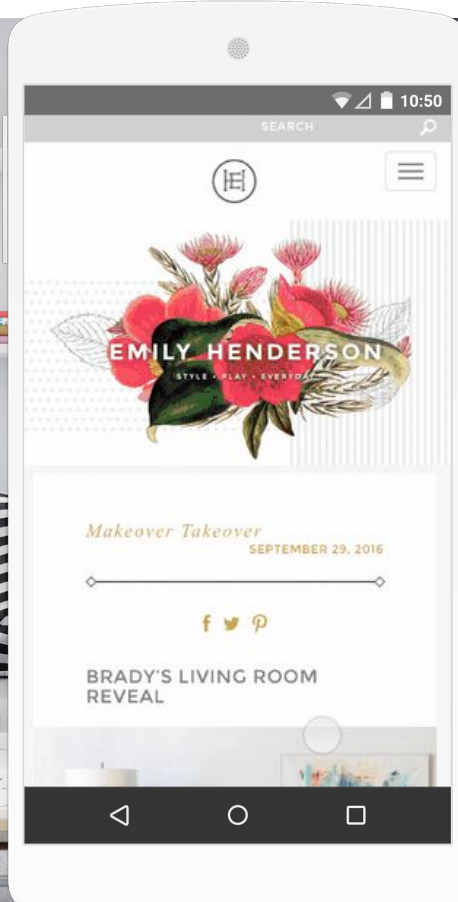
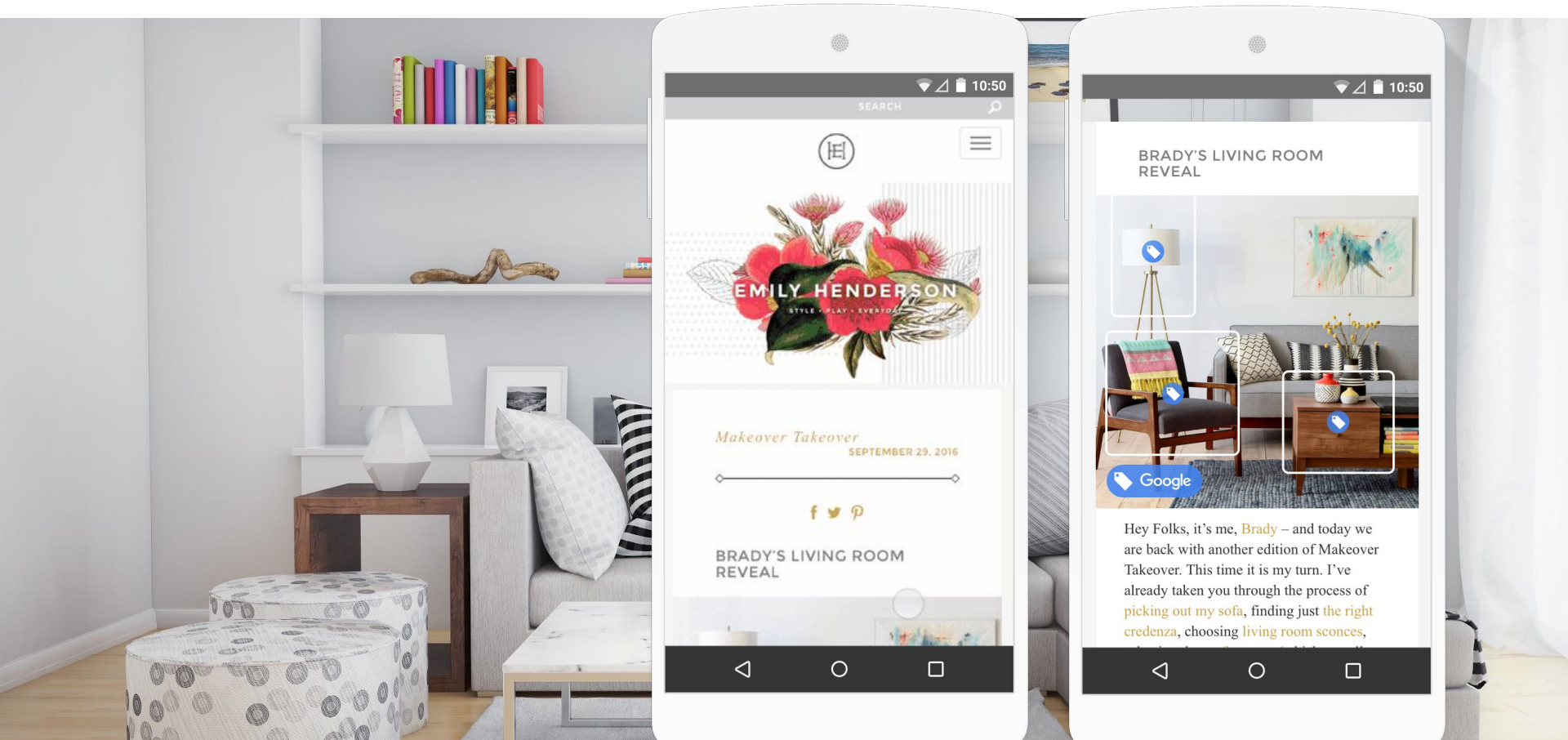
Anticipate needs

Understand context

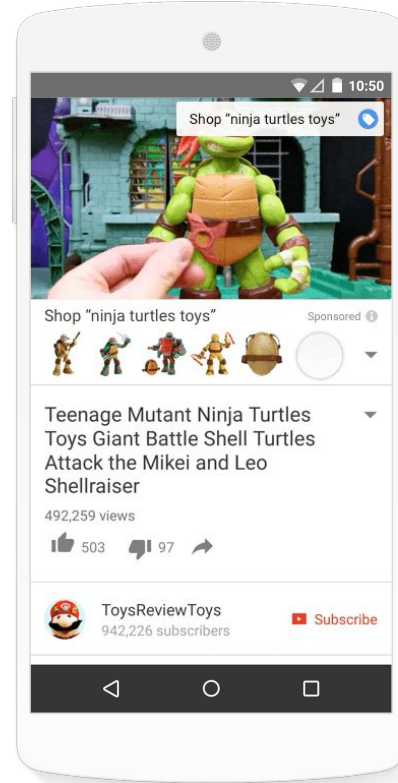
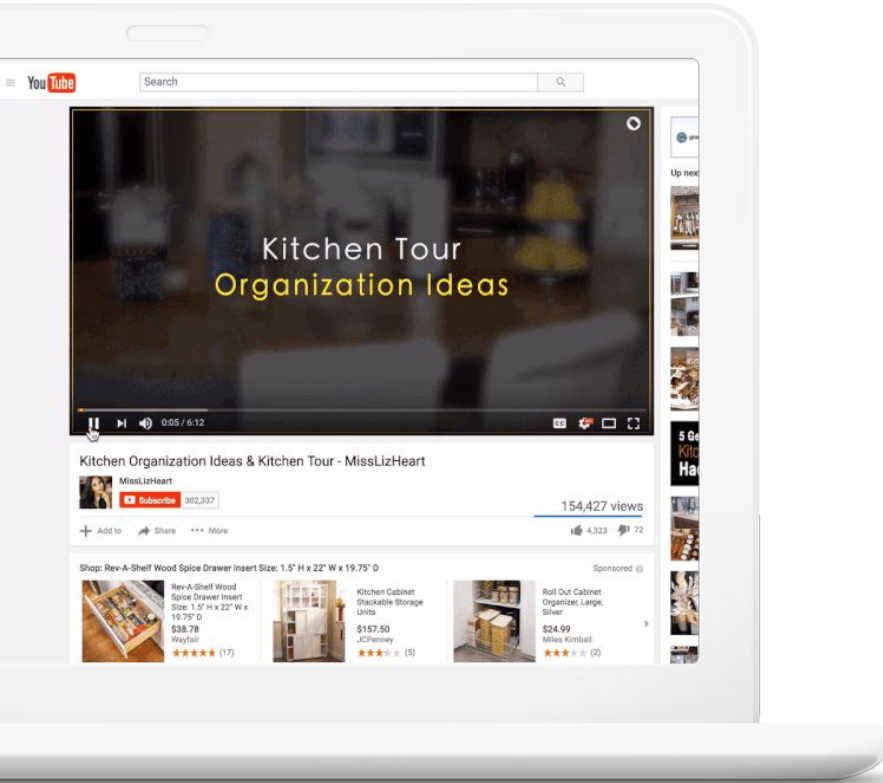


Building a Shoppable Web

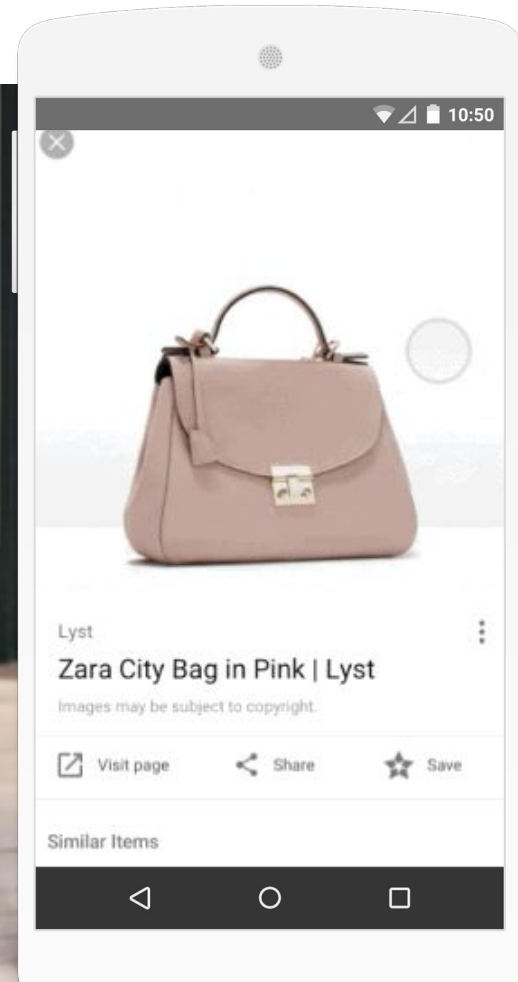
Shoppable images across the web



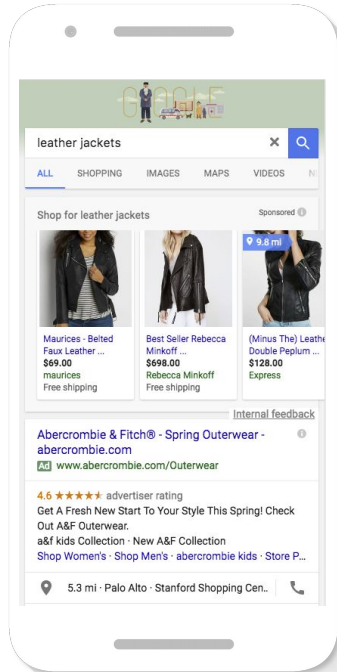
Shoppable videos



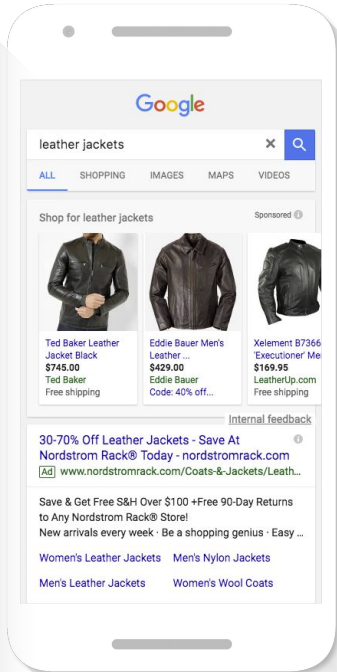
Style ideas



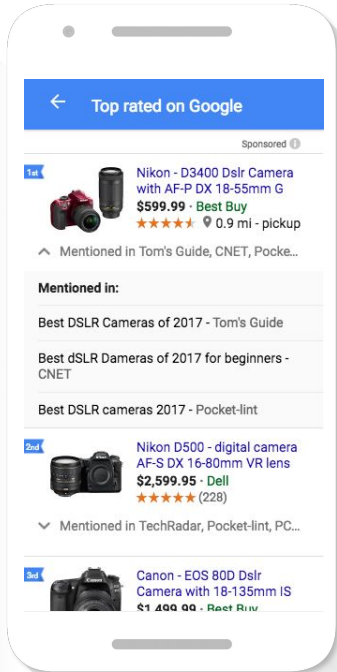
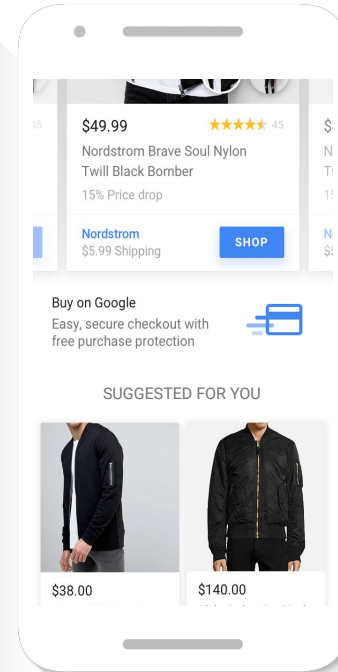
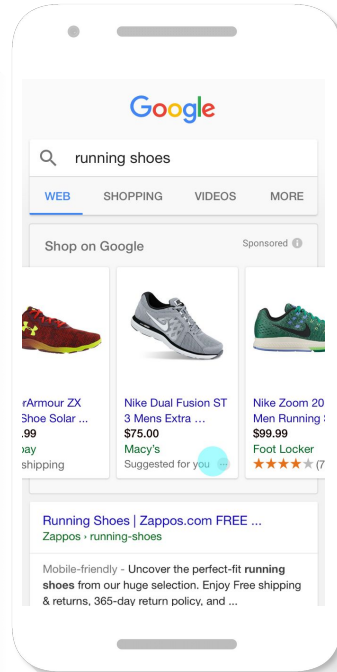
Delivering personalized shopping experiences



Gender Disambiguation



Personal Recommendations



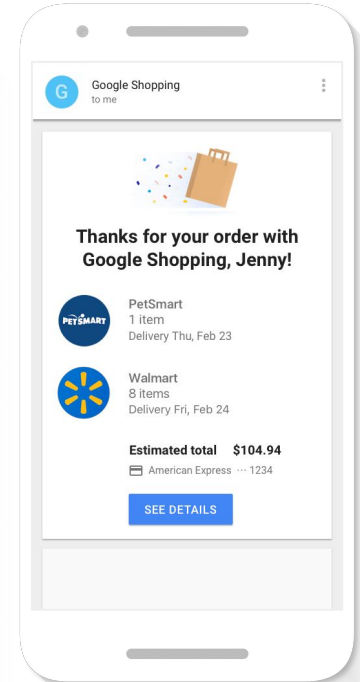
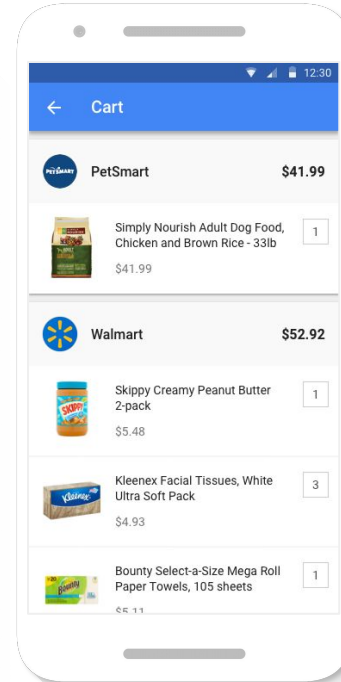
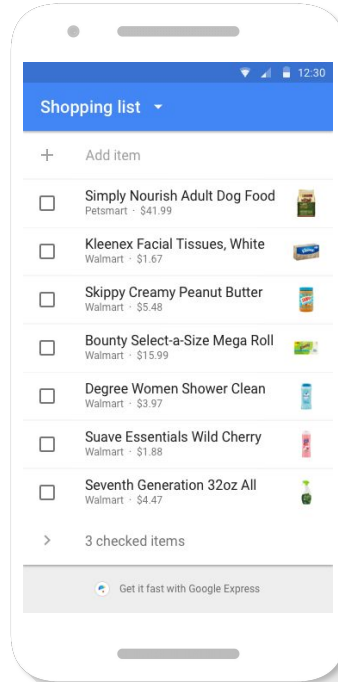
Added Context

Multi-merchant shopping list and checkout



Okay Google,
get more **dog**
food.

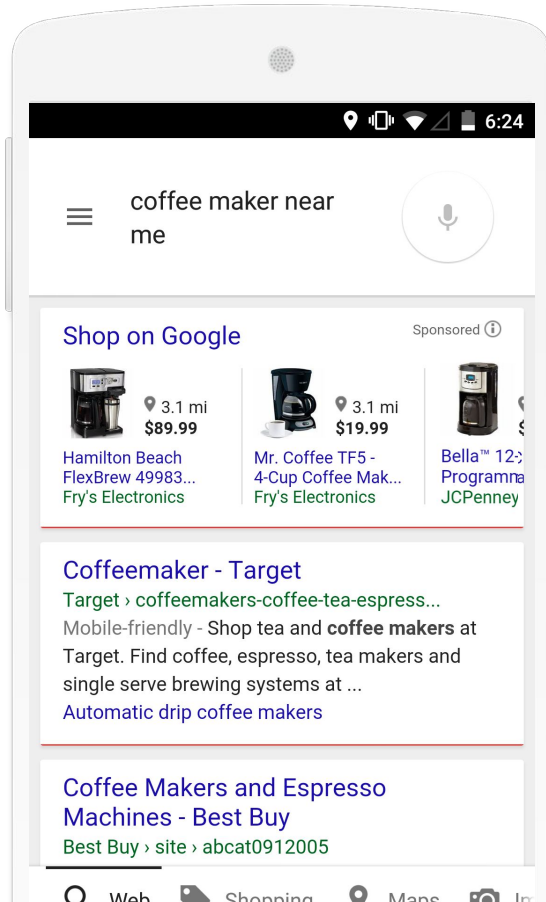
Alright, you usually get
Simply Nourish Adult
Dog Food from
PetSmart. I've added
that to your Shopping
List.



Connecting online activity to in-store sales

Local inventory ads showcase your products and store information to nearby shoppers searching with Google

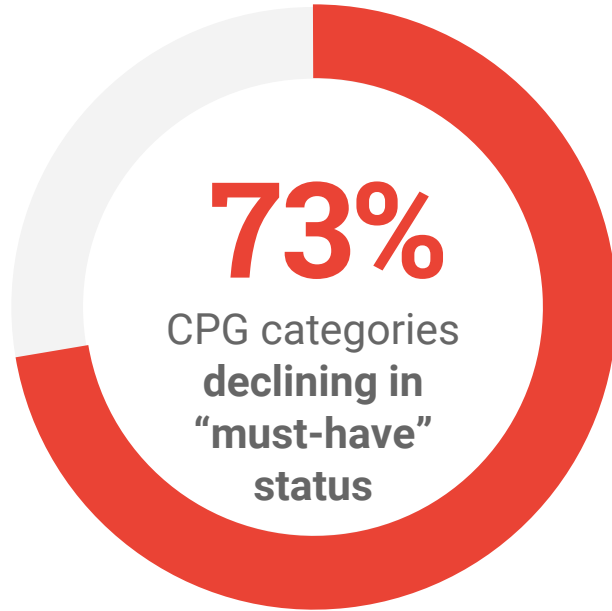
44% of shoppers wish retailers would do a better job of sharing inventory information



Source: Google/Ipsos Canadian Shopping Study, Holiday 2016, n=2729.

Google

Brands and retailers are at a crossroads



Thank You