



The Modern Shopper & How Retailers Can Respond

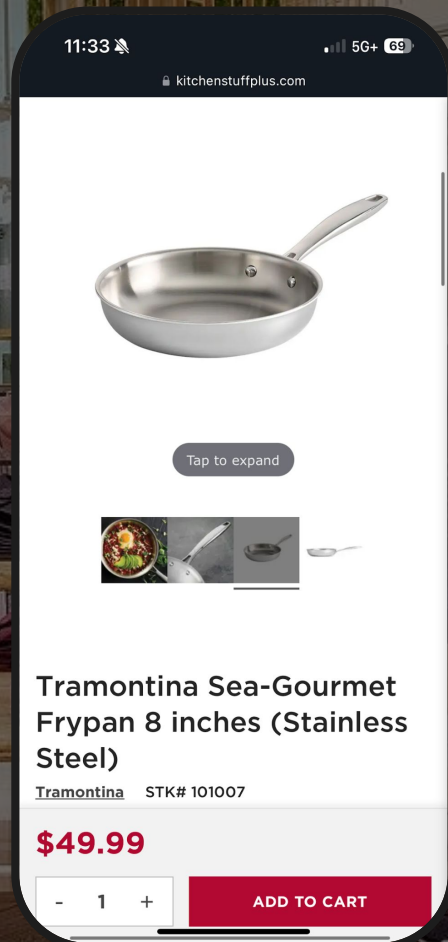
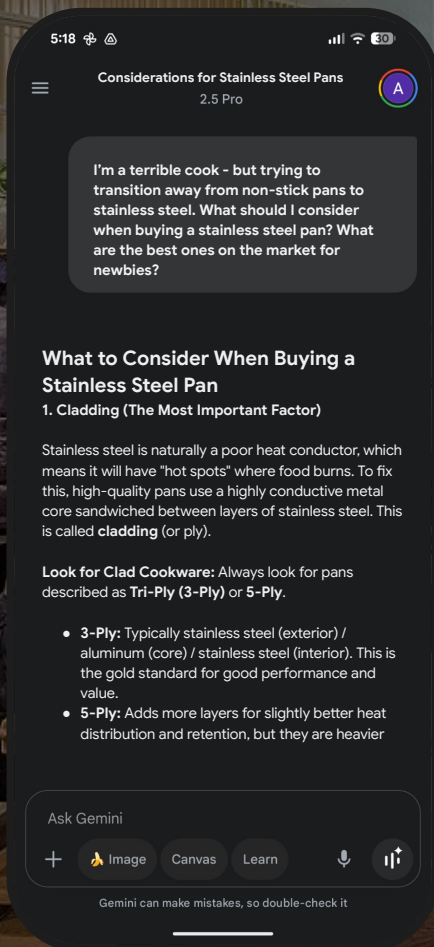
Aria Patel | Global Partner Lead, Retail, Google





6B

Retail Searches in
Canada Annually



Today's agenda



The New Reality of Canadian Retail



Framework for the Modern Shopper



What Retailers Can Do Now

Today's agenda



The New Reality of Canadian Retail



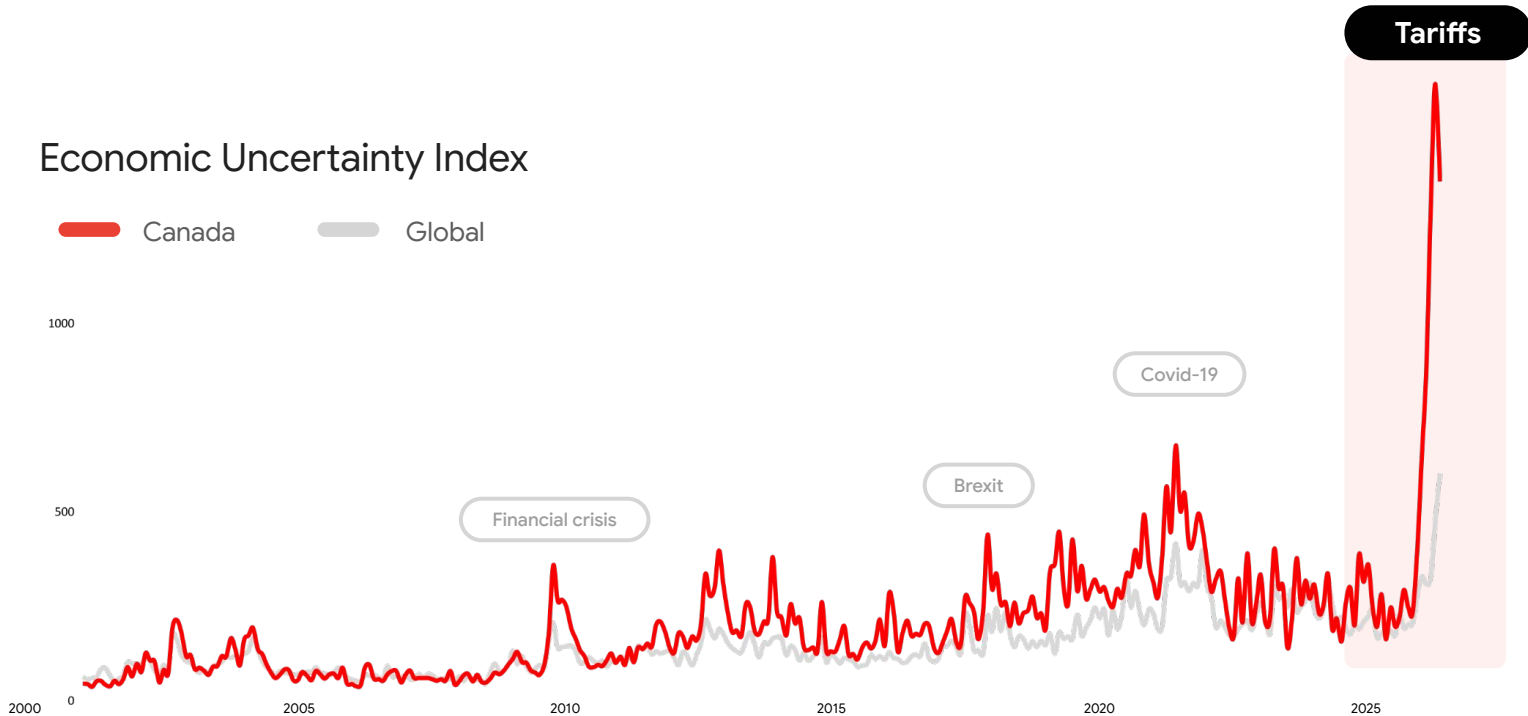
Framework for the Modern Shopper



What Retailers Can Do Now

Canadians are feeling more uncertain

Economic Uncertainty Index



Macro factors create a choiceful consumer

Enduring Concerns

Inflation

~20%

Growth in cumulative
Consumer Price Index
since Dec. 2019

\$120

V. \$100 in 2019

Unemployment

6.9%

July, 2025

Slowing population growth
and trade uncertainty
driving unemployment
higher
(+0.5% YoY)

Signals of Optimism

Consumer Confidence

+5.2

July 2025

The 4th consecutive
monthly gain this year,
rebounding from a
historical low in March

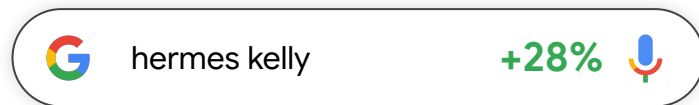
Sales Growth

+6%

August 2025

Sales grew +6% y/y in
August; that's 3x faster than
the growth reported
between Jan-July (+2%)

Yet, two things are true at once



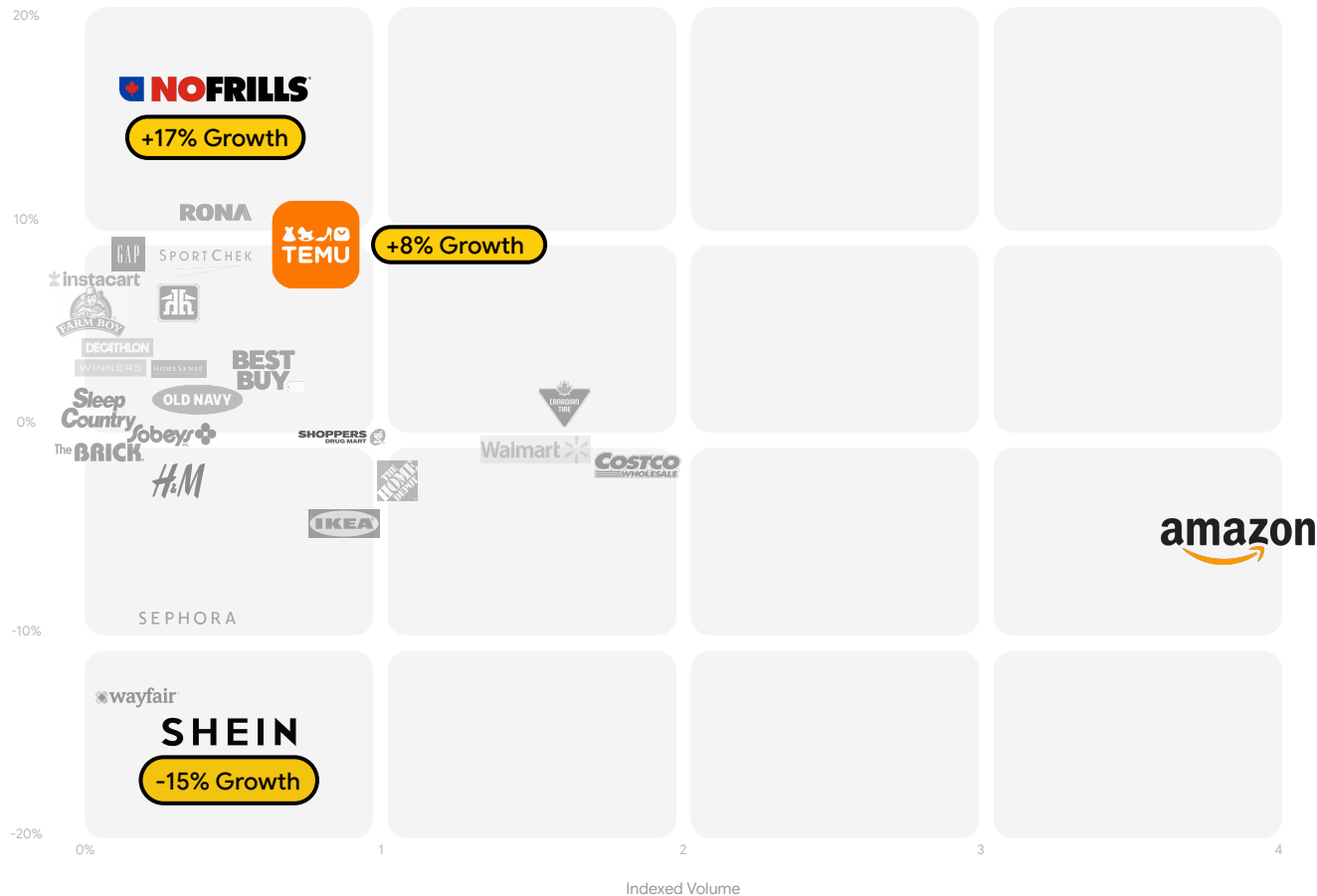
*Price
conscious*



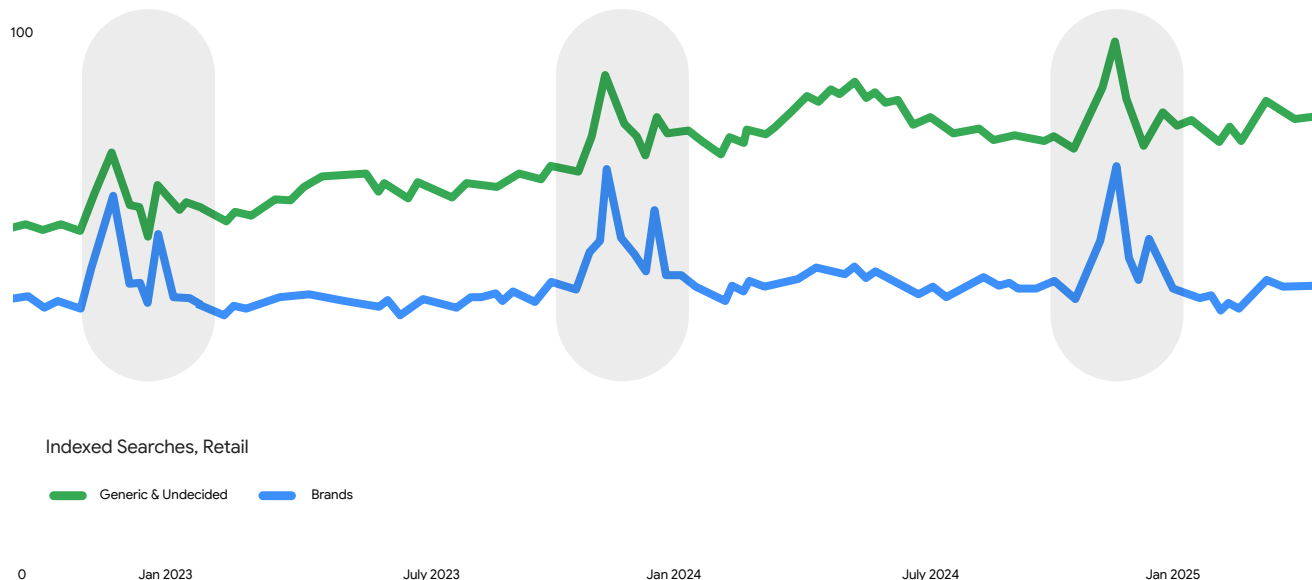
*Choiceful
splurging*

2025:

competing for
a considered,
cost conscious
consumer



Canadians are increasingly undecided when researching products to buy



2.4X
the searches

62%
of Canadians
bought from
a new brand
in 2024

Prime Day: Don't underestimate the halo

October 7-10



9%

growth

for non-Amazon
retailers during
Prime Day





Framework for the Modern Shopper

AI Mode: Launched in Canada in August



ve a light gray couch and am looking for a rug to brigh





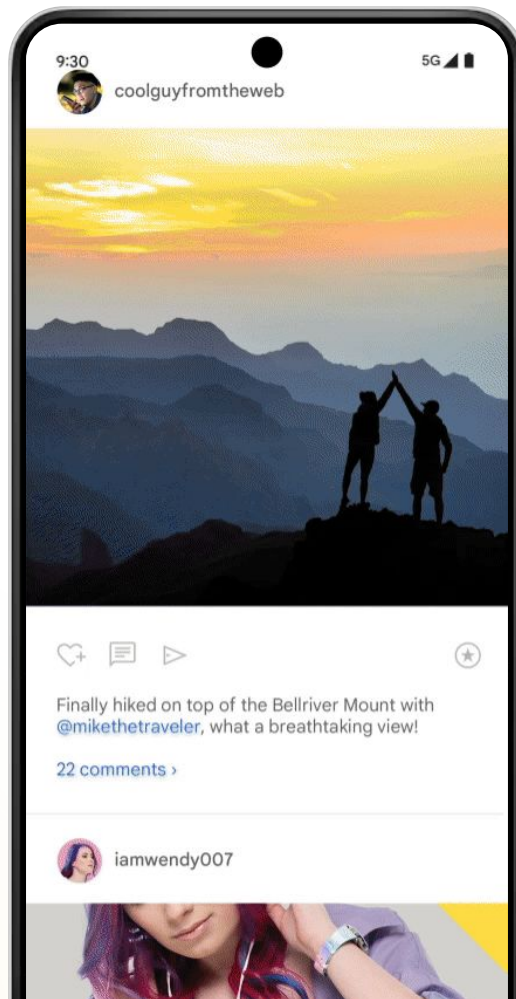
how to bring small dogs on flights



Search (and shop) what you see with Google Lens

+65% YoY, visual searches

1 in 5 visual searches has
a commercial intent

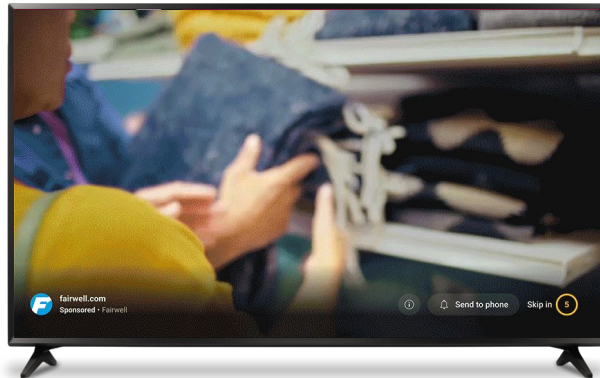
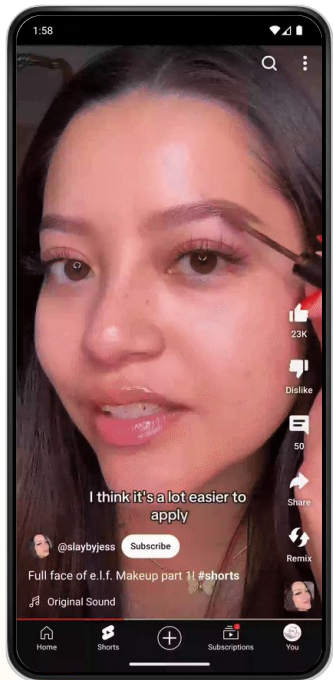


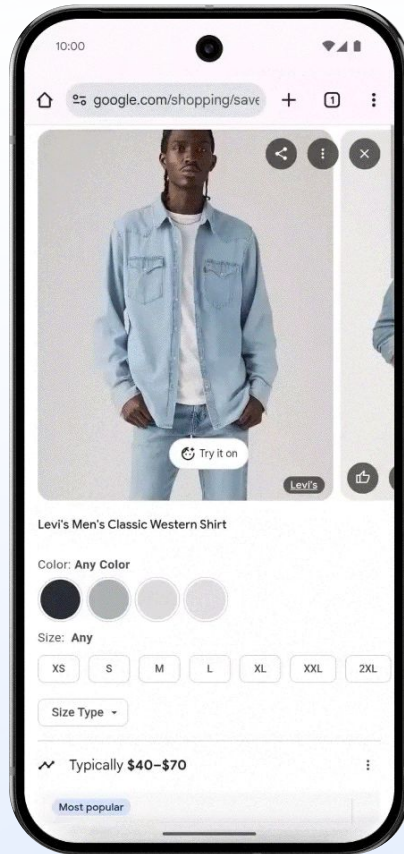
(2)

YouTube: From Viewers to Shoppers

#1 Platform for discovering trends about new products and brands

98% Reach of all Canadians online, including 18M on Connected TVs





The Modern Shopper

KNOWLEDGEABLE

More time spent on enhanced research to justify purchase

FLEXIBLE

Responding quickly to macro-factors & indicators outside of their control

TRUST

Relying on brands they know & love, increasingly searching for “made in Canada”



What Retailers Can Do Now

USE YOUR DATA

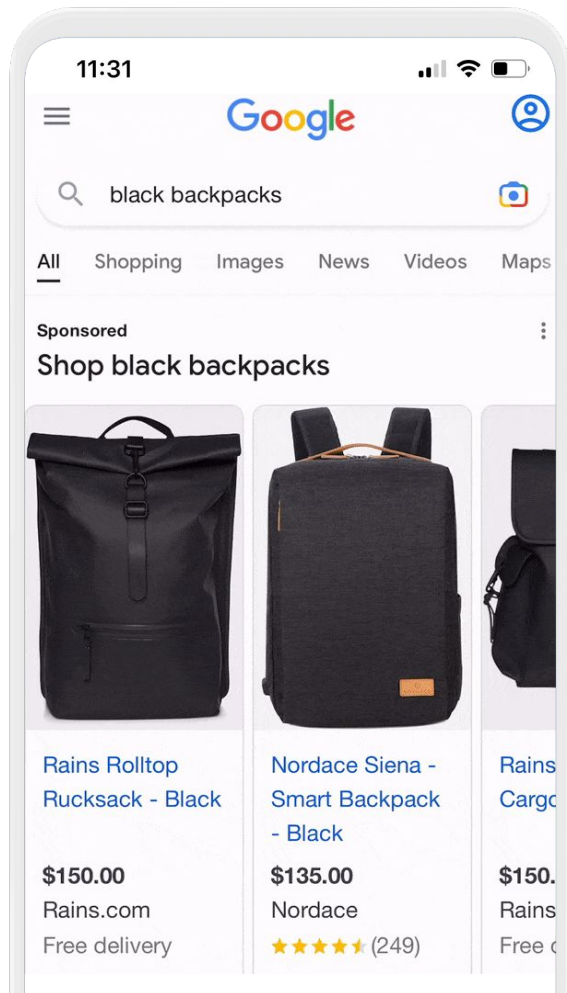
Turning your data into a differentiated asset

BUILD CONNECTIONS

Turning transactions, into relationships

EXPERIMENTATION

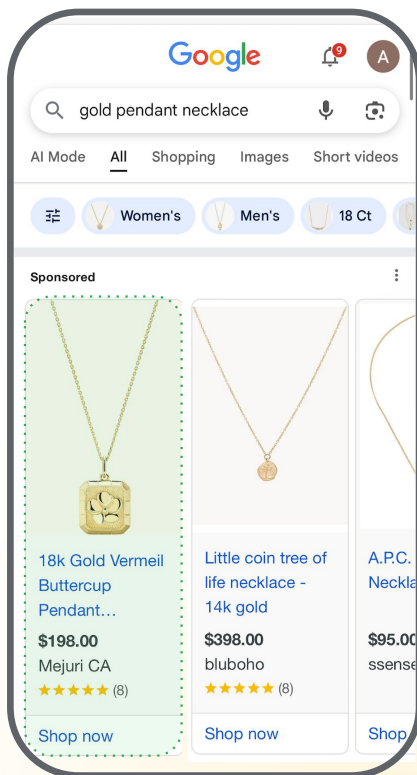
A culture of rapid experimentation



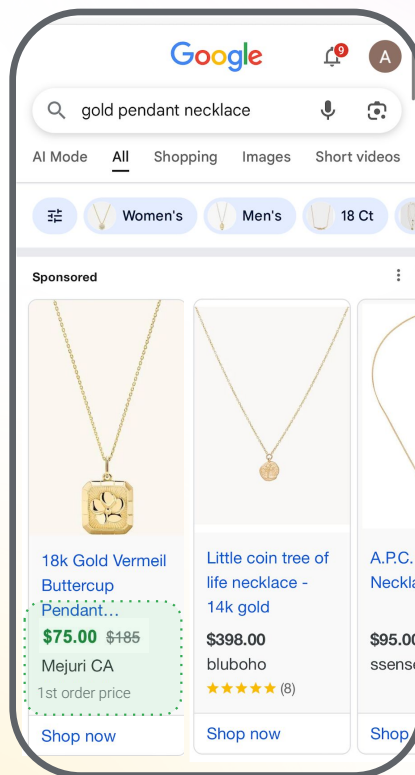
Hey Google,
How do you stand out
in the **sea of same?**

Optimize every experience your customers journey

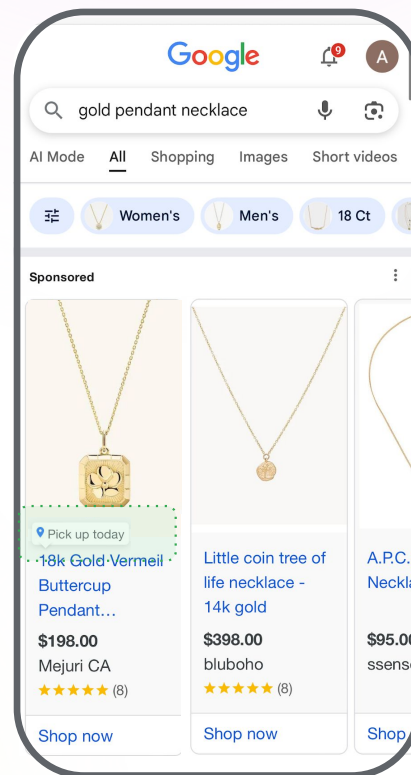
For a high value customer



For a new customer



For a local customer



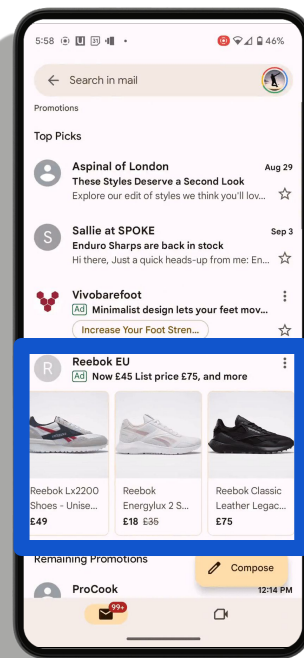
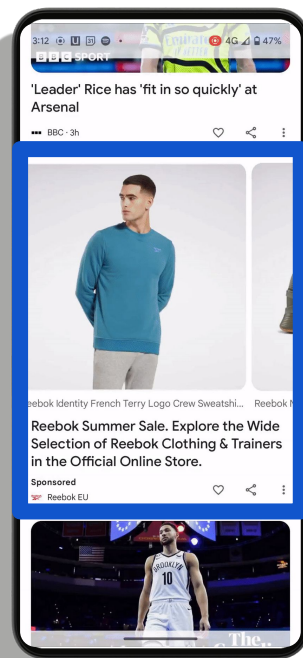
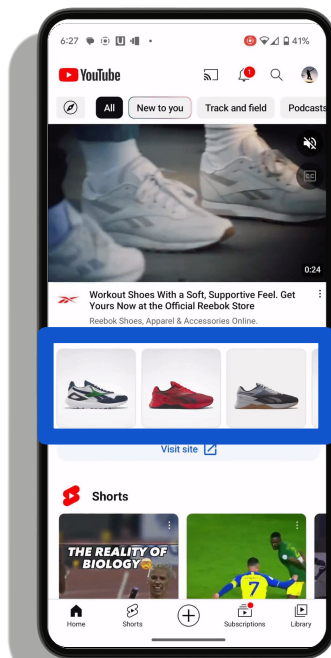


An average person
encounters

~10,000

ads a day

New to brand?
Start with what (and who)
you know works



AI Images

First, I used **Google's new AI image model** to create a customized campaign bundle to bring the products and their context to life



Website images used as source



Output from Google Nano Banana

AI Images



Create ads for 3
**different customer
segments** for
KitchenAid Blenders

New Guest Ad
Blender Base Model



Returning Guest Ad
Blender + Accessories



High LTV Guest Ad
Premium Blender



AI Images

✦ Change to buds



✦ Change to speaker



AI Videos

Experiment with gifs and short form video creative to create immersive product demonstrations



Website images used as source



Output from Google Veo 3

Culture of Experimentation

+9% CART ADDS,
+ 47% RPV



**12K GOLD PLATED MIXED
BEAD MULTI STRAND
NECKLACE**

★★★★★ 17 REVIEWS

\$19 \$29



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Thank You

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