

Lessons from the future



Jason Dubroy

VP Managing Director
TraceyLocke Canada

LESSONS FROM THE FUTURE

TracyLocke



Shopper Marketing



Shopper Optimization



Canadian E-Commerce
Centre of Excellence



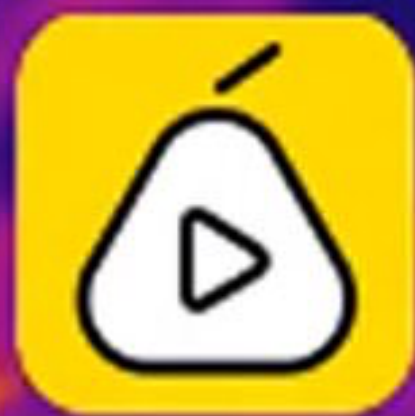
Retail Technology

NEW YORK
TORONTO
CHICAGO
DALLAS
LONDON
PARIS
SINGAPORE
BUENOS ARES

DUBAI
MUMBAI
NEW DELHI
SHANGHAI
TOKYO
MELBOURNE
MEXICO CITY
MANILA
MONTREAL



THE FUTURE?



梨视频

REC 00:00:36

100
80
60
40
20
0
-20
-40
-60
-80
-100

C: 33

-180 -90 0 90

10



H: 31.1

L: 10.1

C: 22.1







James Burke

Historian, Futurist,
and Author



A faded background image of James Burke, an older man with glasses, wearing a dark suit and a light blue shirt, speaking at a podium with a microphone. The image is semi-transparent, allowing the text to be overlaid clearly.

**HISTORY TEACHES US THAT OUTLIER EVENTS
TRANSLATES ROUTINE INTO HUMAN EVOLUTION
BY INTRODUCING NEW FEATURES.**



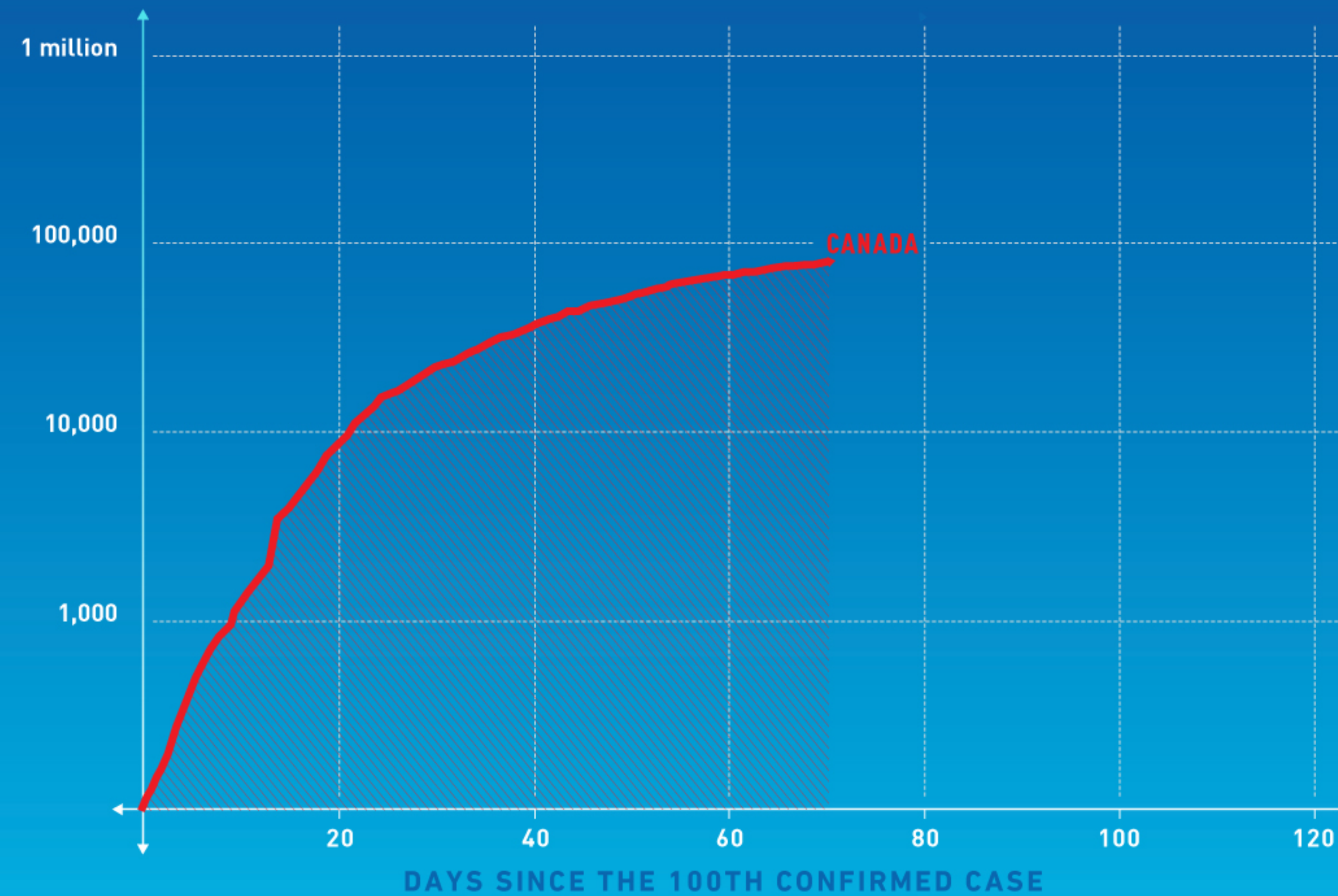
James Burke

Historian, Futurist,
and Author

ARE WE BENDING THE CURVE?

The number of confirmed cases is lower than the number of total cases.
The main reason for this is limited testing.

CANADA
● 81,313



ARE WE BENDING THE CURVE?

The number of confirmed cases is lower than the number of total cases.
The main reason for this is limited testing.

UNITED STATES

○ 1.58 MILLION

UNITED KINGDOM

● 259,559

ITALY

● 228,006

GERMANY

● 177,212

CHINA

● 84,079

CANADA

● 81,313

JAPAN

○ 16,513

SOUTH KOREA

● 11,142

AUSTRALIA

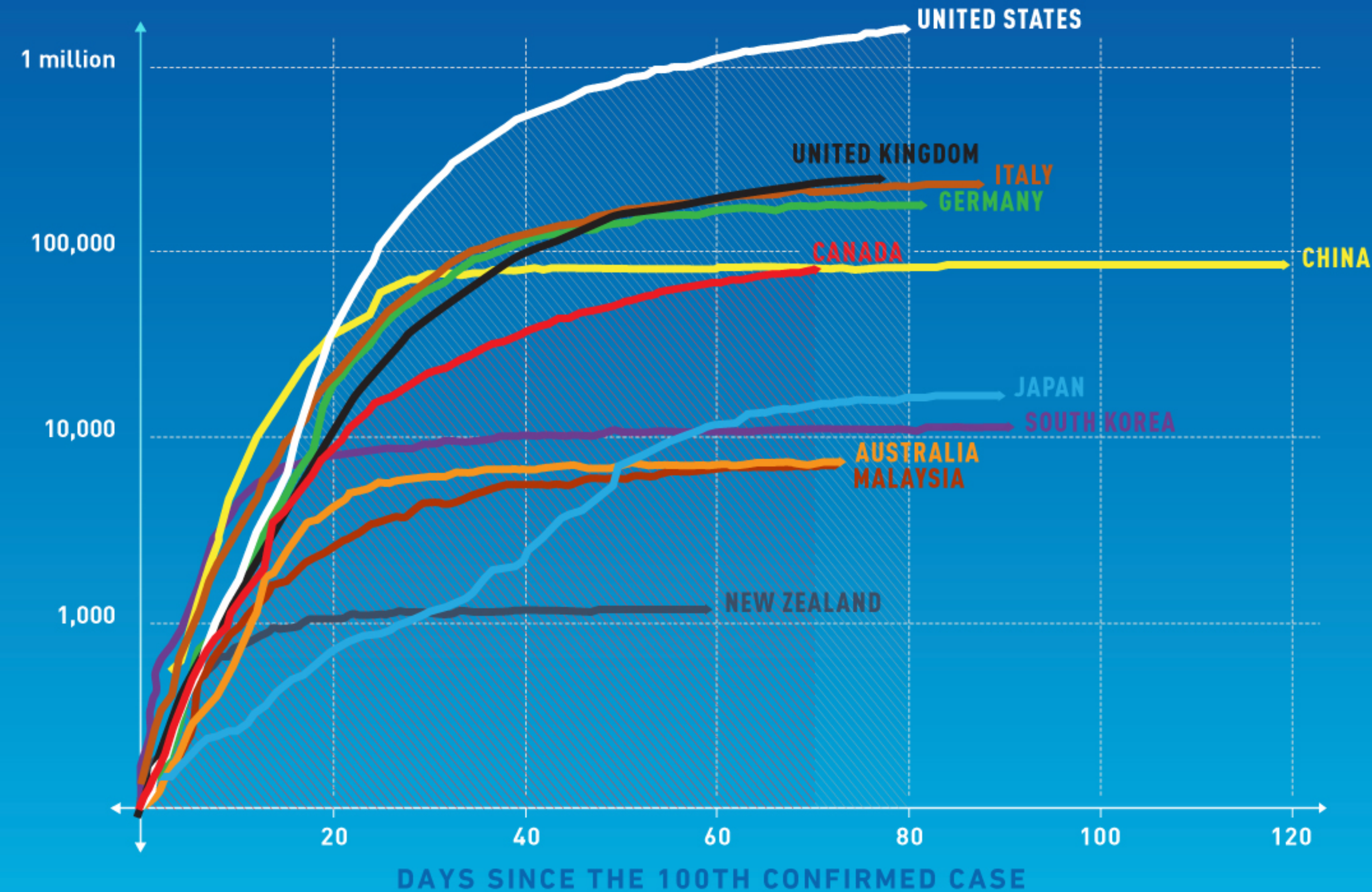
● 7,081

MALAYSIA

● 7,059

NEW ZEALAND

● 1,154



LESSONS?

IT ISN'T WHAT RETAILERS AND BRANDS
DID DURING COVID AS A WAY TO
MAINTAIN TO THEIR BUSINESS...

...ITS ABOUT HOW THEY LEVERAGED
INNOVATION THROUGH BEHAVIOUR CHANGE
TO GROW THEIR BUSINESS **POST-COVID.**

THE 5 OBSERVABLE CONNECTIONS:

HEALTH
TECHNOLOGY
COMMERCE
HABIT
BRANDING



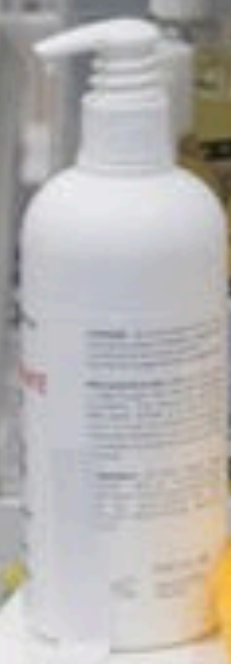
Here's Why Angry Shoppers Are Boycotting Costco

A new policy designed to protect shoppers and staff has some up in arms.

BY COLBY HALL

MAY 8, 2020



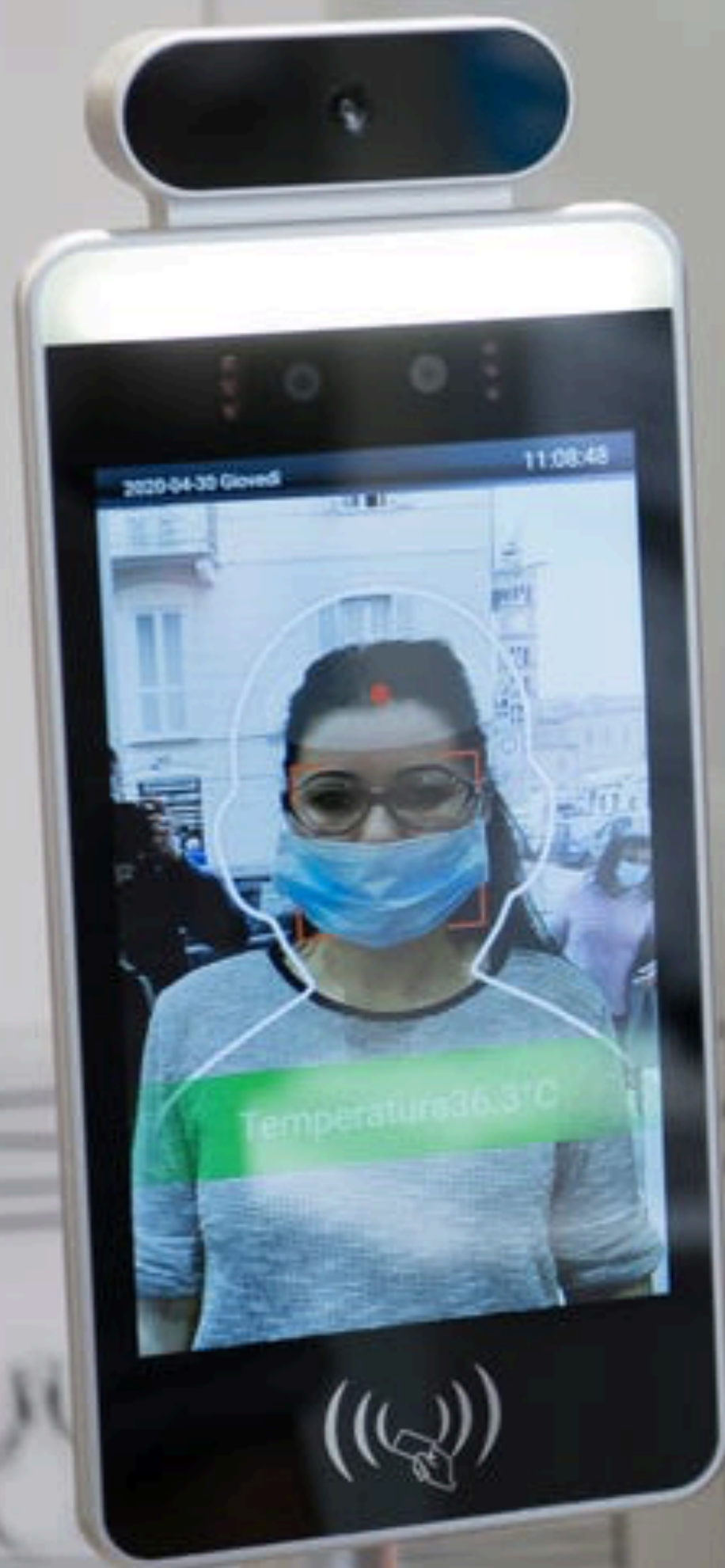


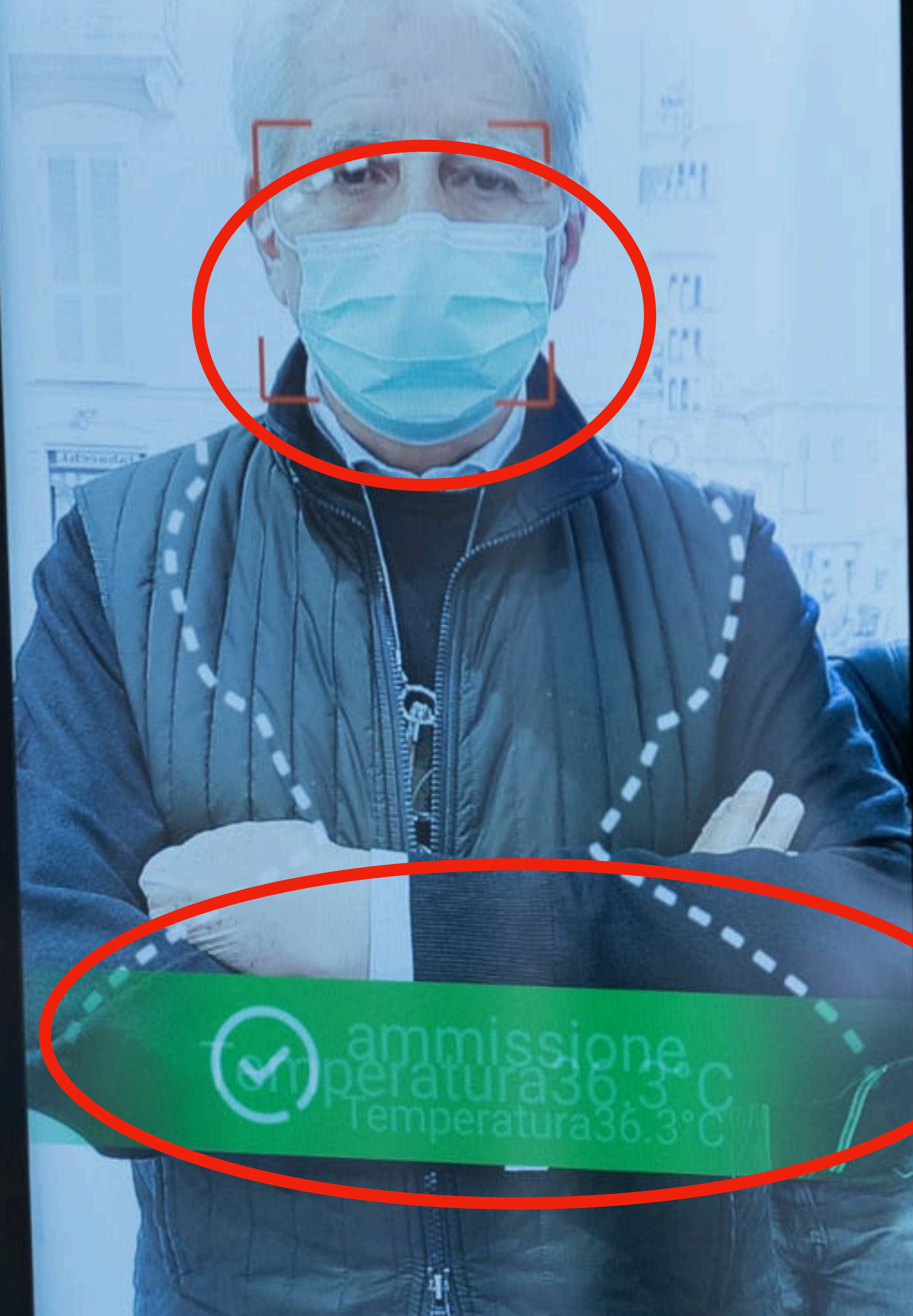
IGIENIZZANTE
MANI
AD USO
DELLA CLIENTELA



Per sicurezza,
misura la temperatura

Alcool denaturato 250ml | Alcool denaturato 250ml







Maskerini TFF2 10,00 €
Maskerini TNT lavabili 5,00 €
Maskerini chirurgici 0,61 €

ATTENZIONE
I cittadini interessati a fruire delle detrazioni e in sede di dichiarazione dei redditi, possono o a pagare in contanti le spese sostenute per per l'acquisto di farmaci e di dispositivi medici.
Per fruire delle detrazioni relative ad altre spese, interessati dovranno provvedere al relativo pagamento con modalità tracciabili (bancomat, carta di credito, ecc.).

3.90 € 4.90 €
GEL IGIENIZZANTE LAVAMANI
SENZA ALCOL
EFFICACE
NATURALI
PIACIUTO



DISINFEZIONE

IGIENIZZANTI

ERBORISTERIA



2020-04-30 Giovedì 11:01:51

ⓧ Accesso negato
Nessuna maschera



100%
fresh British
meat in all our
ready meals

£5

80p

£1.00

69p

99p

£2.29

SINGLES

LOW PRICE
£1.15

PHILADELPHIA

PHILADELPHIA

The Laughing Cow

dairy
cheese spread

coop
Beetroot
Salad

coop
300g

Crisp Beetroot Salad

coop
300g

coop
300g

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COVID-19

Will coronavirus change Germans' love of cash?



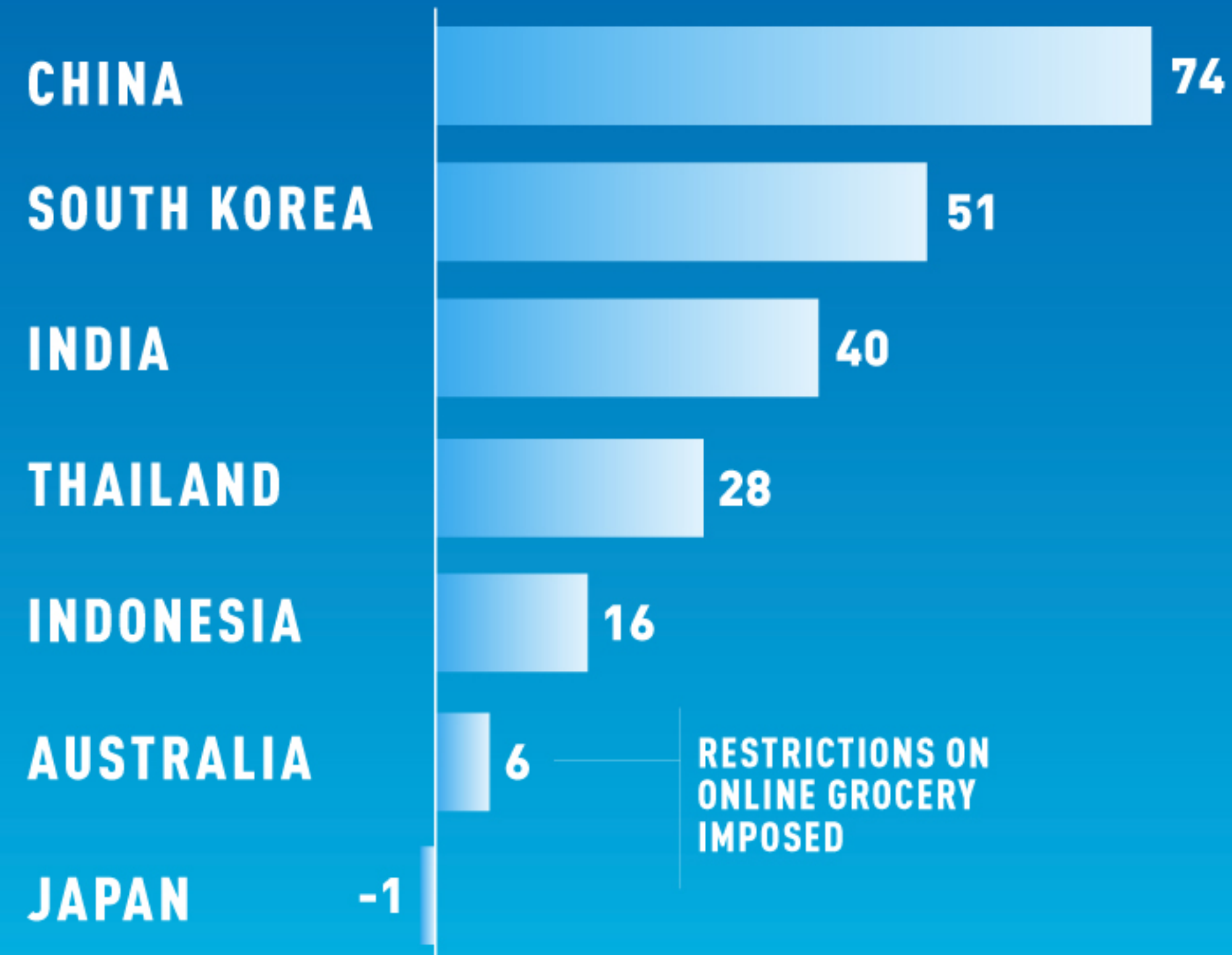
ONLINE GROCERY - THEN AND NOW

AN ACCELERATION IN ONLINE GROCERY SHOPPING

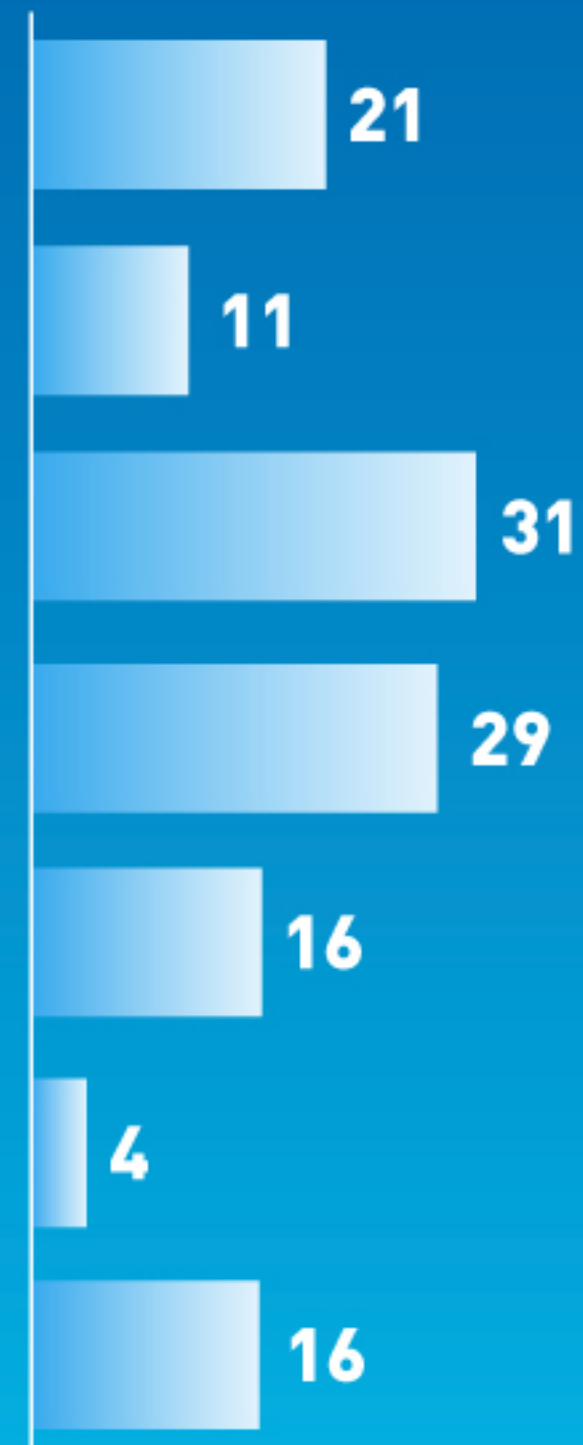
Online grocery channel net reported behavior during COVID-19 vs before; net intent for after COVID-19 vs during (now)¹

DURING COVID-19 vs BEFORE

Visit frequency²

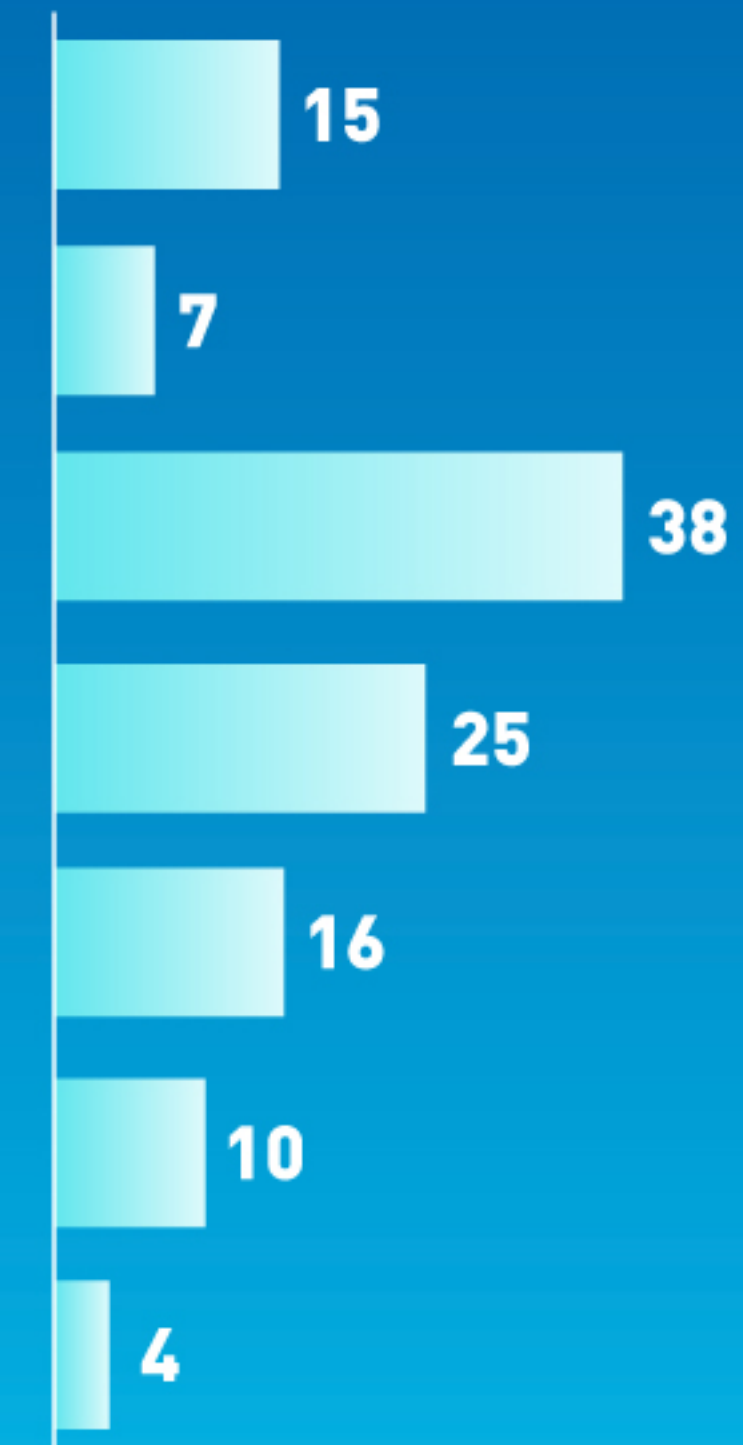


Spend³



AFTER COVID-19 vs DURING

Visit frequency⁴



¹Net behavior is calculated by subtracting the % of shoppers in the channel stating they have decreased visit frequency or spending in the channel from the % stating they increased frequency or spending

²Q: Among the below grocery shopping channels, which ones do you visit more/less frequently during the COVID-19 outbreak compared to before?

³Q: Which store types have you increased/decreased your spending per month during the COVID-19 outbreak compared to before?

⁴Q: Within the below store types, which ones do you think you will visit more/less frequently after the COVID-19 outbreak stabilizes?

Source: COVID-19 mobile survey, 3/12-3/25/2020 N +5,013, sampled and balanced to match general population (except India, with higher focus on consuming class)

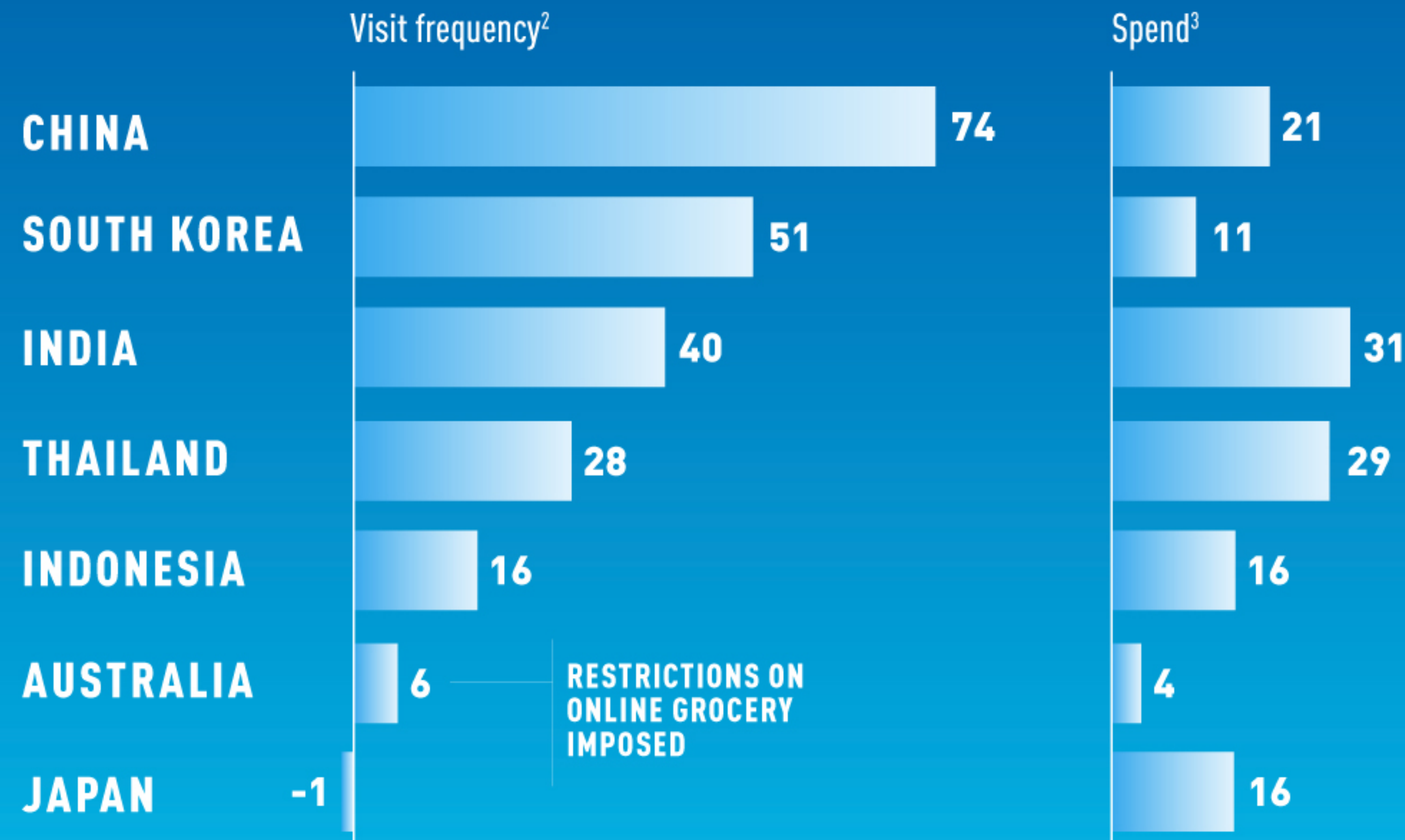
McKinsey & Company COVID-19 Global Consumer Pulse - Sampled April 10 - May 3, 2020

ONLINE GROCERY - THEN AND NOW

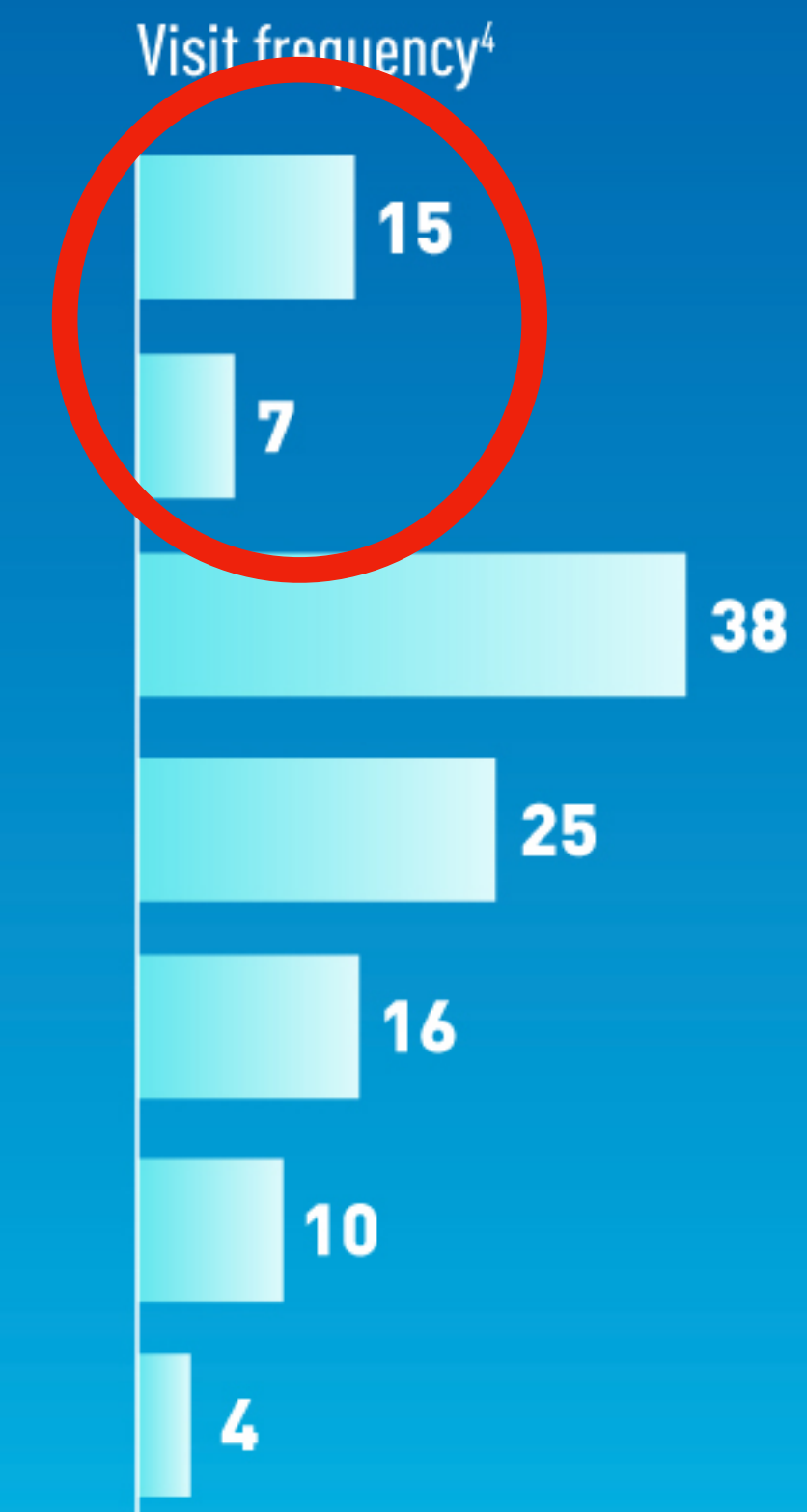
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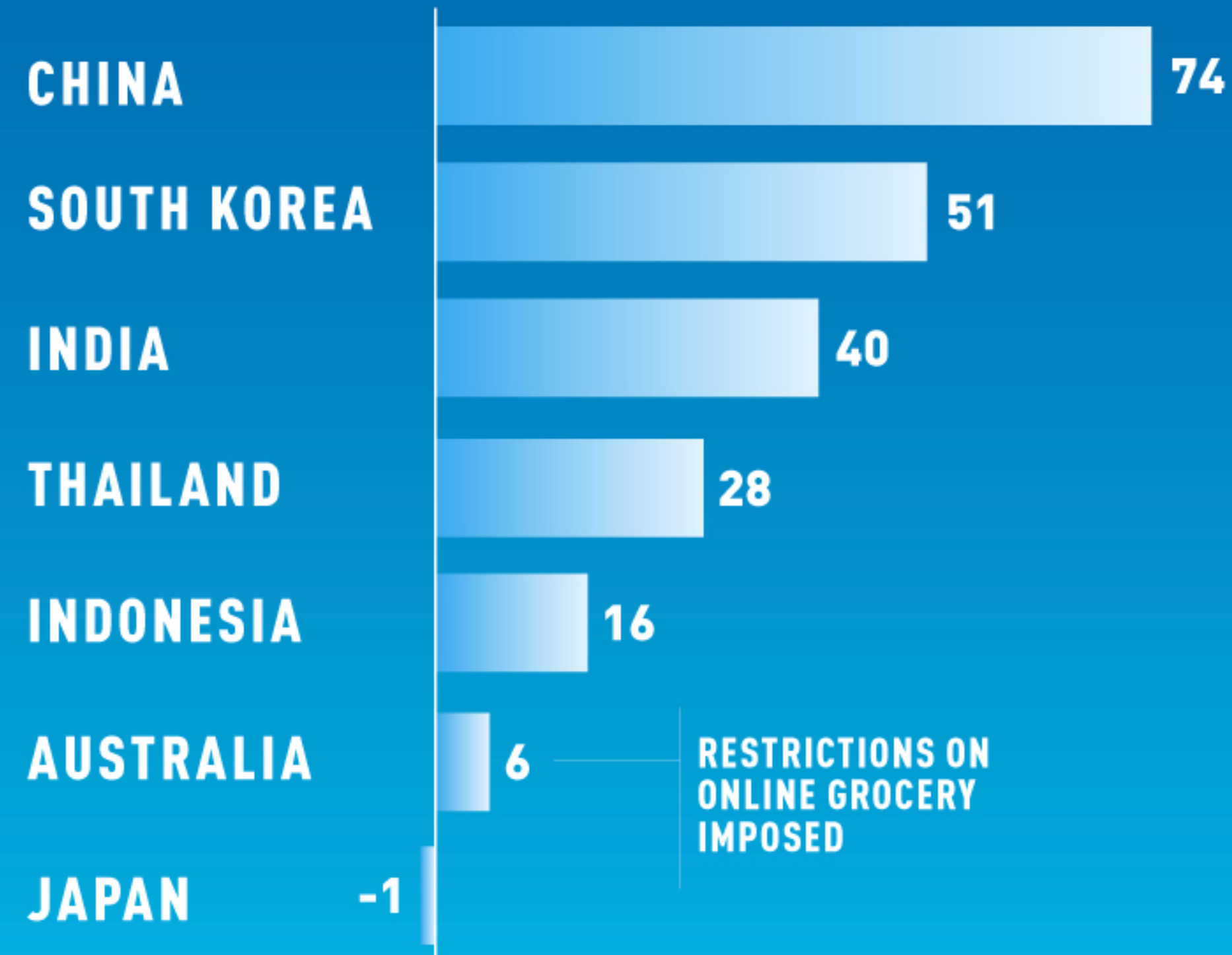
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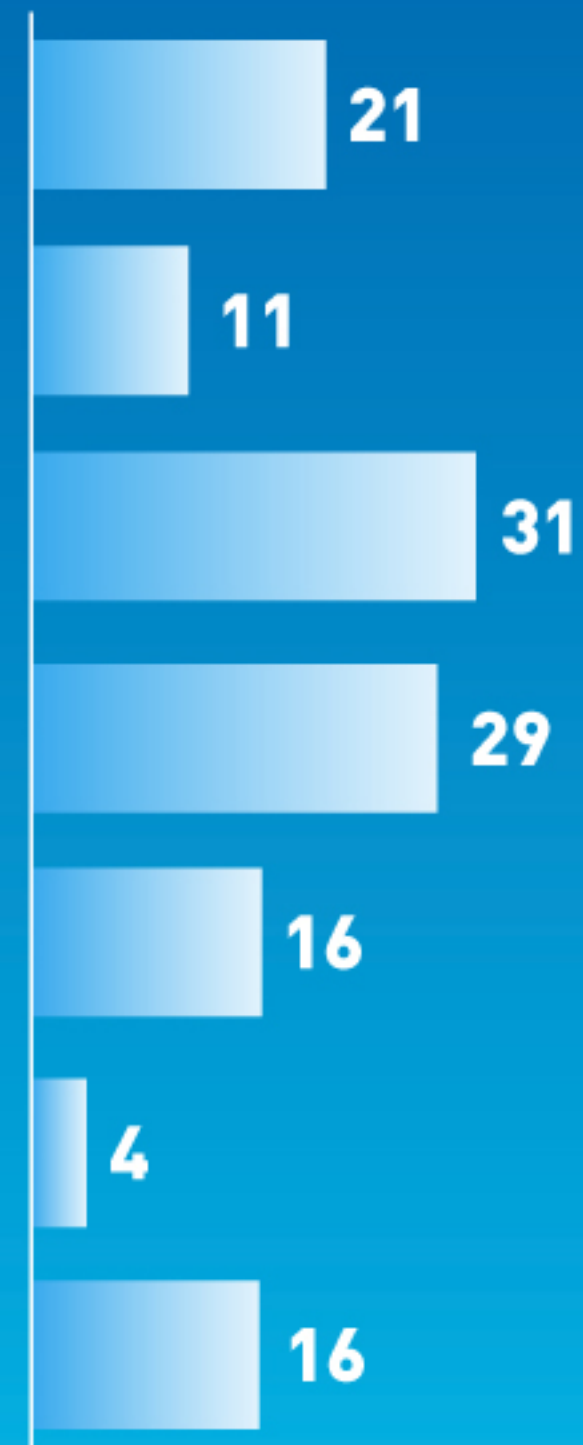
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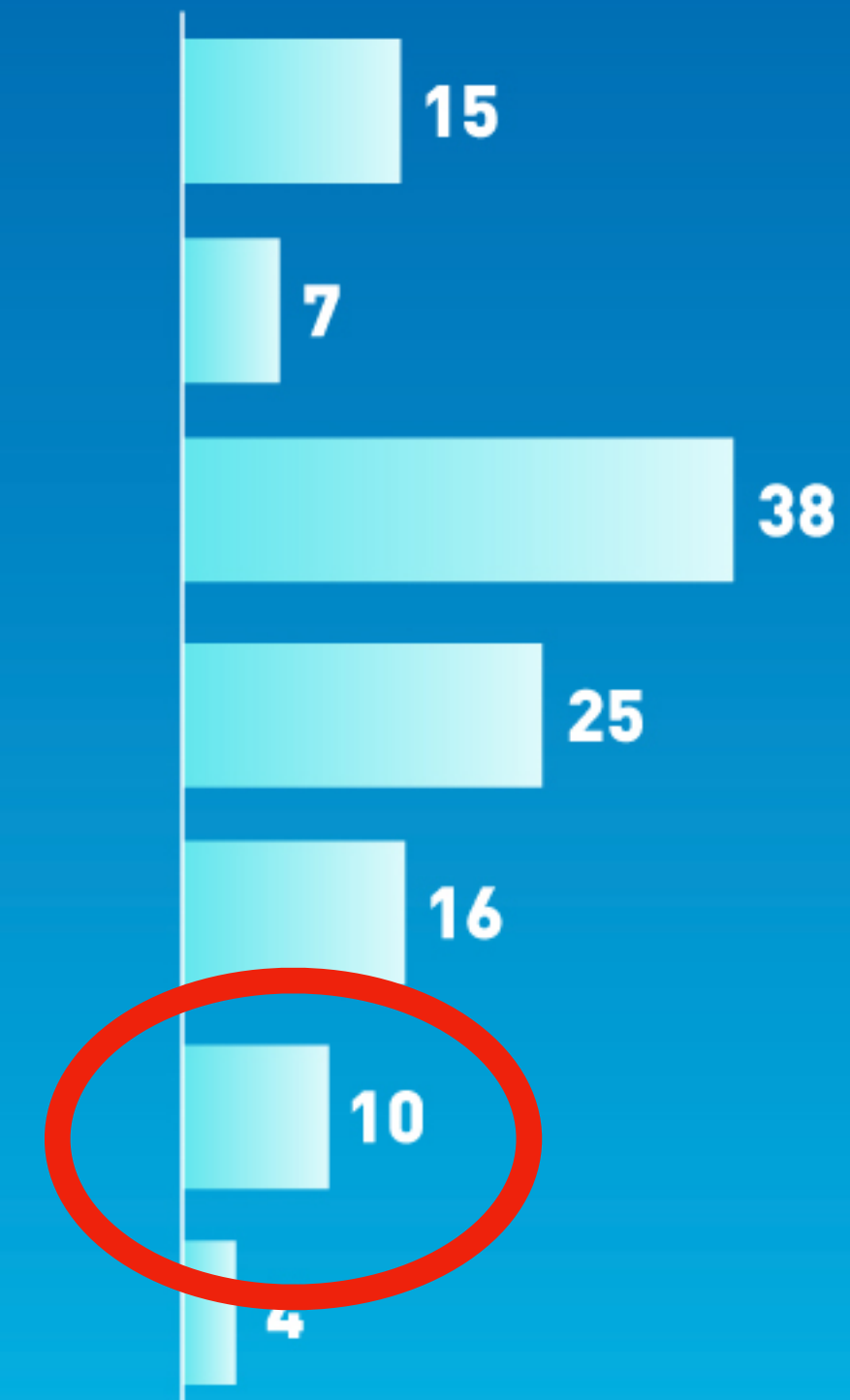


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McKinsey & Company COVID-19 Global Consumer Pulse - Sampled April 10 - May 3, 2020

POST 1ST WAVE - PHYSICAL GROCERY STILL MATTERS

CONSUMERS ANTICIPATE CHANGING BEHAVIORS POST-COVID-19

Expected behavior post-COVID-19 compared to pre-COVID-19¹, net intent %²



¹Q: "Once the coronavirus (COVID-19) situation has subsided, which of the following do you think you will do more or less compared to before the coronavirus (COVID-19) situation started?"

²Net intent measures percent who indicate they will do more of this activity minus percent who indicate they will do less.

McKinsey & Company COVID-19 Global Consumer Pulse - Sampled April 10 - May 3, 2020

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SWITCHING MINDSET: BRANDS

A THIRD HAVE SWITCHED BRANDS BASED ON CONVENIENCE AND PROMO/DISPLAY,
OF WHICH 20% INTEND TO STICK TO THEIR NEW CHOICE

Primary driver for switching to a new brand/product during
COVID², % respondents who have tried new/alternate product brands

Post-COVID
situation³

32%

of consumers
have tried
new/alternate
products brands¹

New/alternate options are easier to
consume during the COVID-19 outbreak

45

New/alternate options were under
Promotions/display

41

New/alternate options are safer

37

New/alternate options offer Better
value or cheaper

35

Brands that I usually purchase were
not available

33

20%

of consumers
who switched
brands expected
to continue
purchasing the
new brand
post-COVID

¹Q: Have you tried new/alternate product brands during the current COVID outbreak that you do not usually purchase?

²Q: Why did you switch from the brands you usually purchase to new/alternate options? (N=196, Percent of responses from consumers new/alternate product brands)

³Q: After COVID, do you in general plan to switch back to the product brands you usually purchased before? (N=196, Percent of responses from customers who have tried new new/alternate product brands)

McKinsey & Company COVID-19 mobile survey 3/21-3/23/2020 N = 611 Sampled and balanced to match China's general population 18-65 years-old

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SWITCHING MINDSET: BRANDS

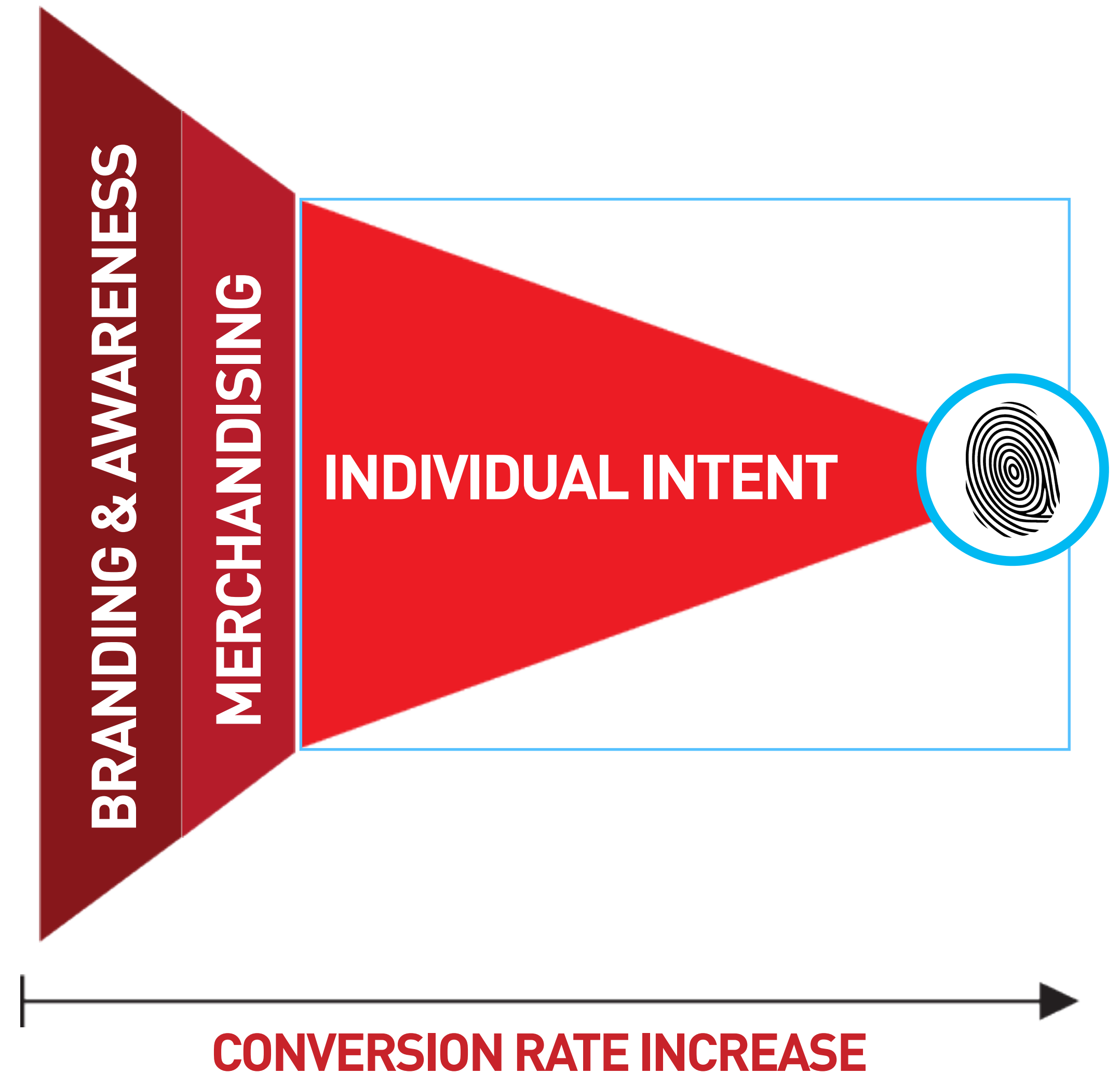
Mr. Sharp simplifies the real challenge of growing a brand down to one thing: **AVAILABILITY**.



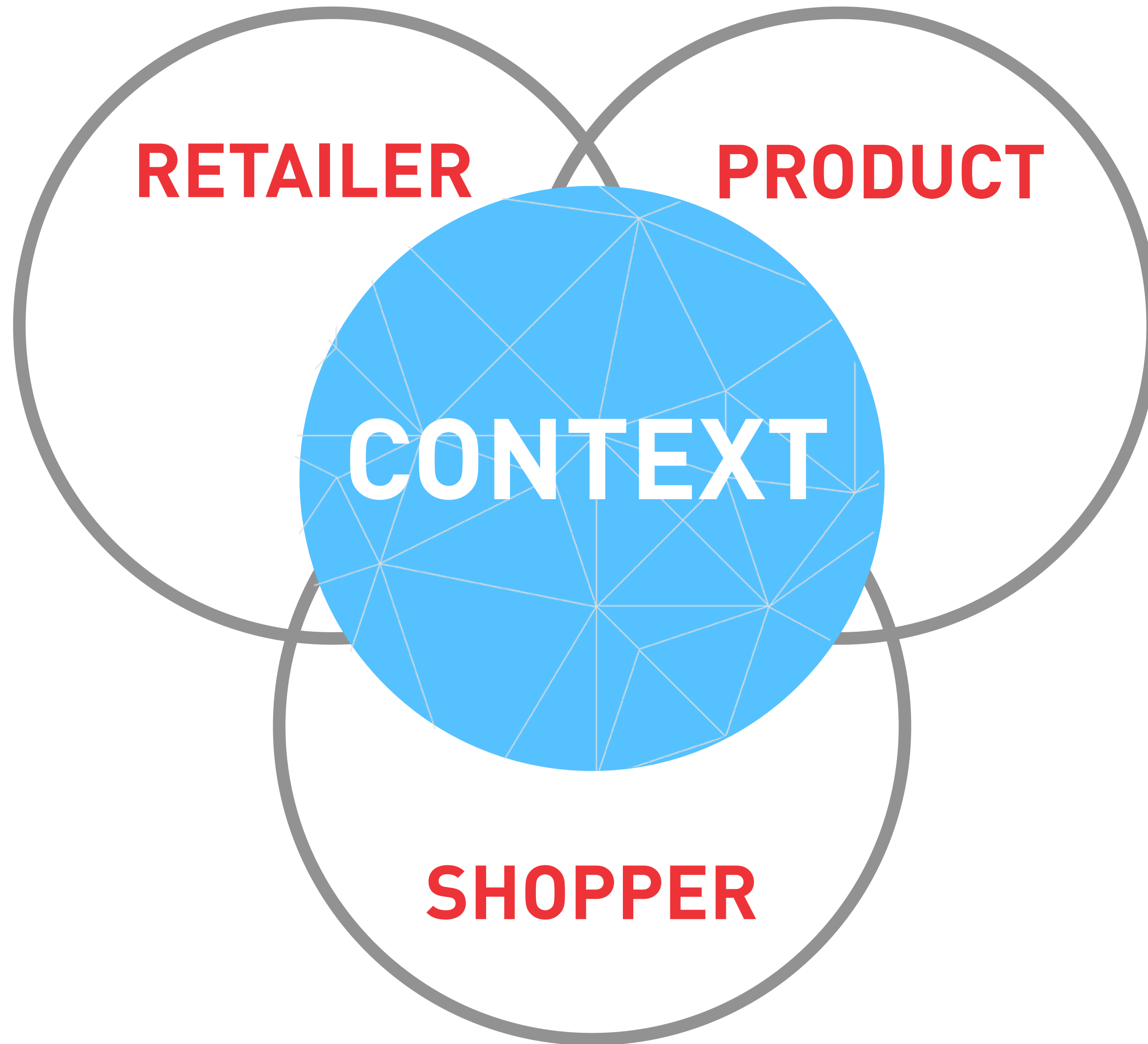
MENTAL AVAILABILITY



PHYSICAL AVAILABILITY

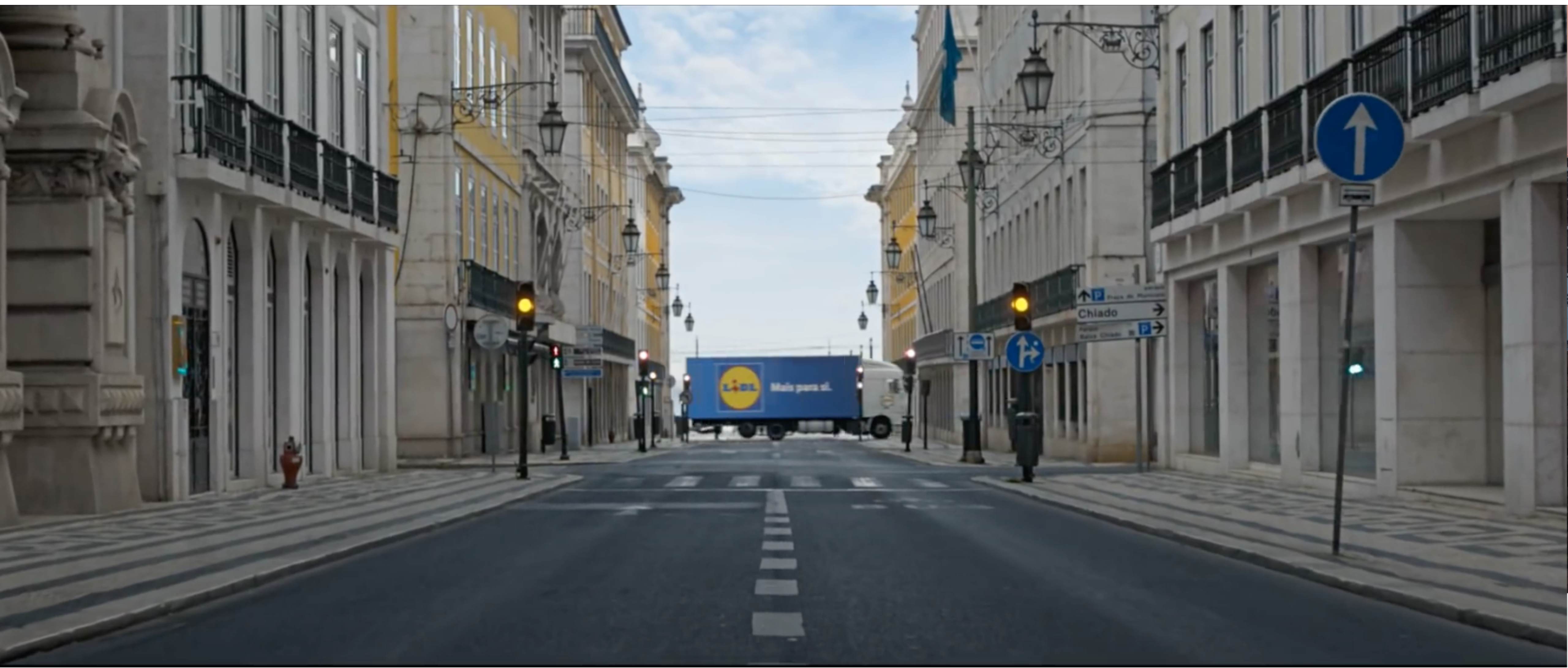


SWITCHING MINDSET: BRANDS



The image is a square collage composed of four smaller photographs. The top-left photo shows a person's hands on a steering wheel, looking out a car window at a sunset or sunrise over a city. The top-right photo shows a man and a woman sitting in the front seats of a car, looking forward. The bottom-left photo shows a person's hands on a steering wheel, looking out a car window at a city street. The bottom-right photo shows a man and a woman sitting in the front seats of a car, looking forward. Overlaid on the collage is the text "EVERY COVID-19 COMMERCIAL IS EXACTLY THE SAME" in large, bold, white, sans-serif capital letters.

**EVERY
COVID-19
COMMERCIAL IS
EXACTLY THE SAME**





Search 4G 11:49 33% 17

商品

详情

评价

天猫超市 | SC Johnson

清洁除菌 用爱守护 满99减10元

去除 99.9% 细菌

威猛洁厕4瓶装 再送洁厕块 立即抢购 >

威猛先生厨房重油污 650g+550g*3 新品上市横扫污渍 立即抢购 >

威猛先生每日净摩洁瓶350g*2 一喷一擦无需过水 立即抢购 >

雷达电热蚊香液 精选草本 绿茶芳香 立即抢购 >

威猛先生洗衣机槽清洁剂250g 杀菌消毒除垢祛味 立即抢购 >

Ziploc/密保诺 密实袋中号24只装 美国进口收纳保鲜 立即抢购 >

进入天猫超市

收藏

加入购物车

清洁除菌 用爱守护

99.9%

Mr. Muscle

ONLINE

INSTORE

LE WHOPPER



DE LA QUARANTAINE.



SWITCHING MINDSET: STORES

MORE THAN A QUARTER OF SHOPPERS HAVE SHIFTED AWAY FROM THEIR PRIMARY STORES,
OF WHICH 47% DO NOT INTEND TO SWITCH BACK

28%
of consumers
have switched
to a different store

Reasons for switching store

Primary/regular store did not have good quality of fresh products during outbreak

Moved to a store closer to home

Primary/regular store stocked out of my favourite brands during the outbreak

Primary/regular store is out of stock of a lot of items

Primary/regular store feels not to be safe/infection free

Primary/regular store does not offer competitive prices

Moved to a store that offers better delivery service

Changed to an online store/mobile app-based store

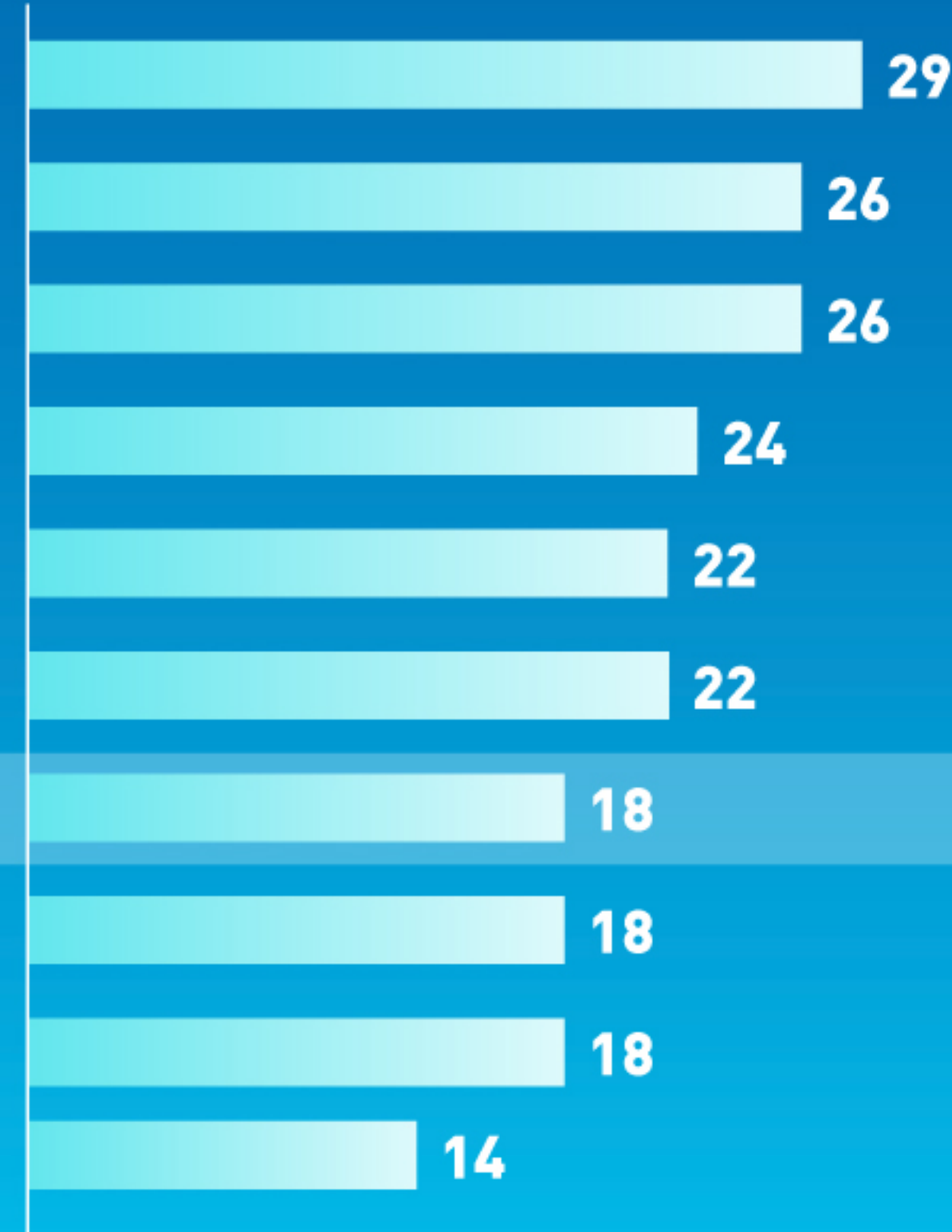
Moved to a store that offers better curbside or in-store pick up service

Moved to a store closer to work

Post-COVID situation²

53%

of consumers
who switched
stores are expected
to switch back
to their primary store



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BUYING & SUPPLYING ▾

STORES ▾

CHANNELS ▾

FINANCE ▾

PEOPLE ▾

REPORTS ▾

EVENTS ▾

JOB

SUBSCRIBE

HOT TOPICS | [Coronavirus](#)

in harmony with nature

ONLINE

Heinz insists DTC food service ‘won’t impact’ wholesale and c-store customers

By [Lyndsey Cambridge](#) | 15 April 2020

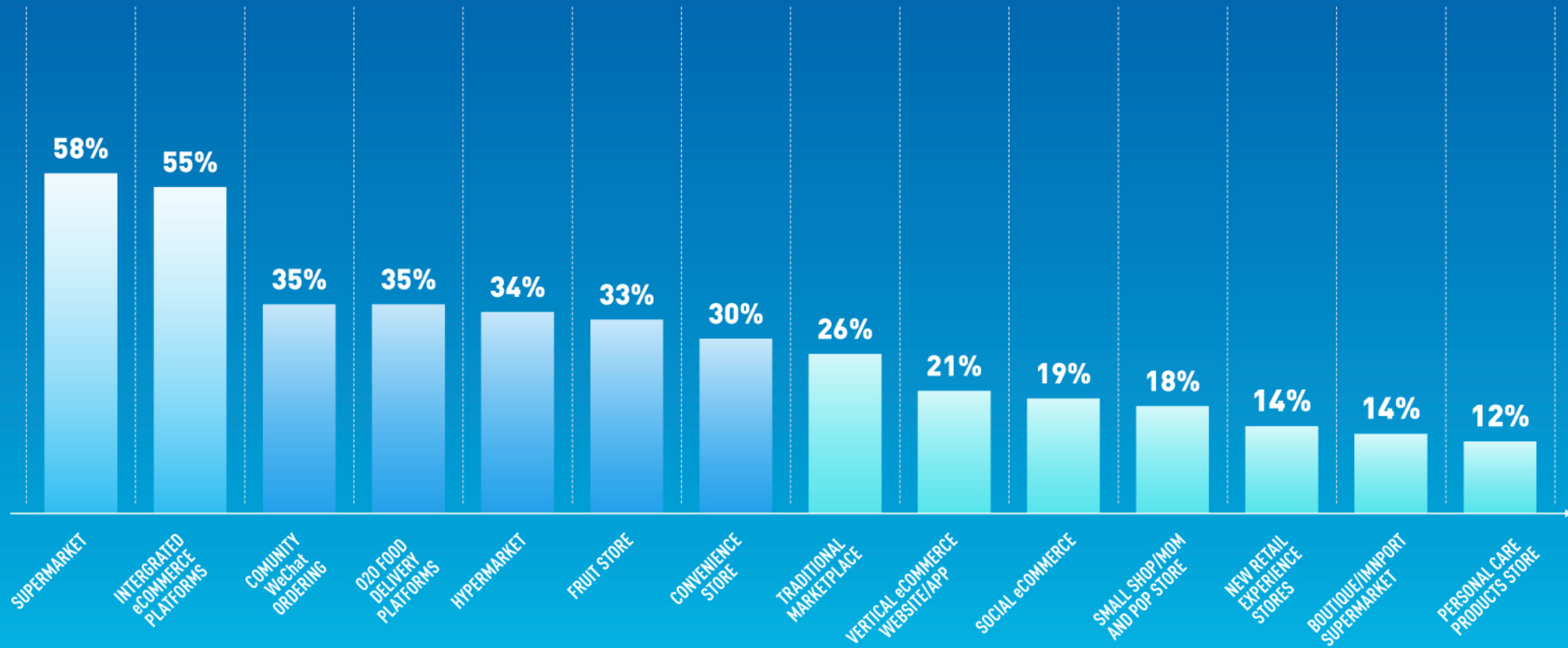
The timing of the move has upset many of its wholesaler customers who are struggling to receive enough stock



SWITCHING MINDSET: CHANNELS

PURCHASING CHANNELS CHOSEN BY CONSUMERS DURING THE PANDEMIC

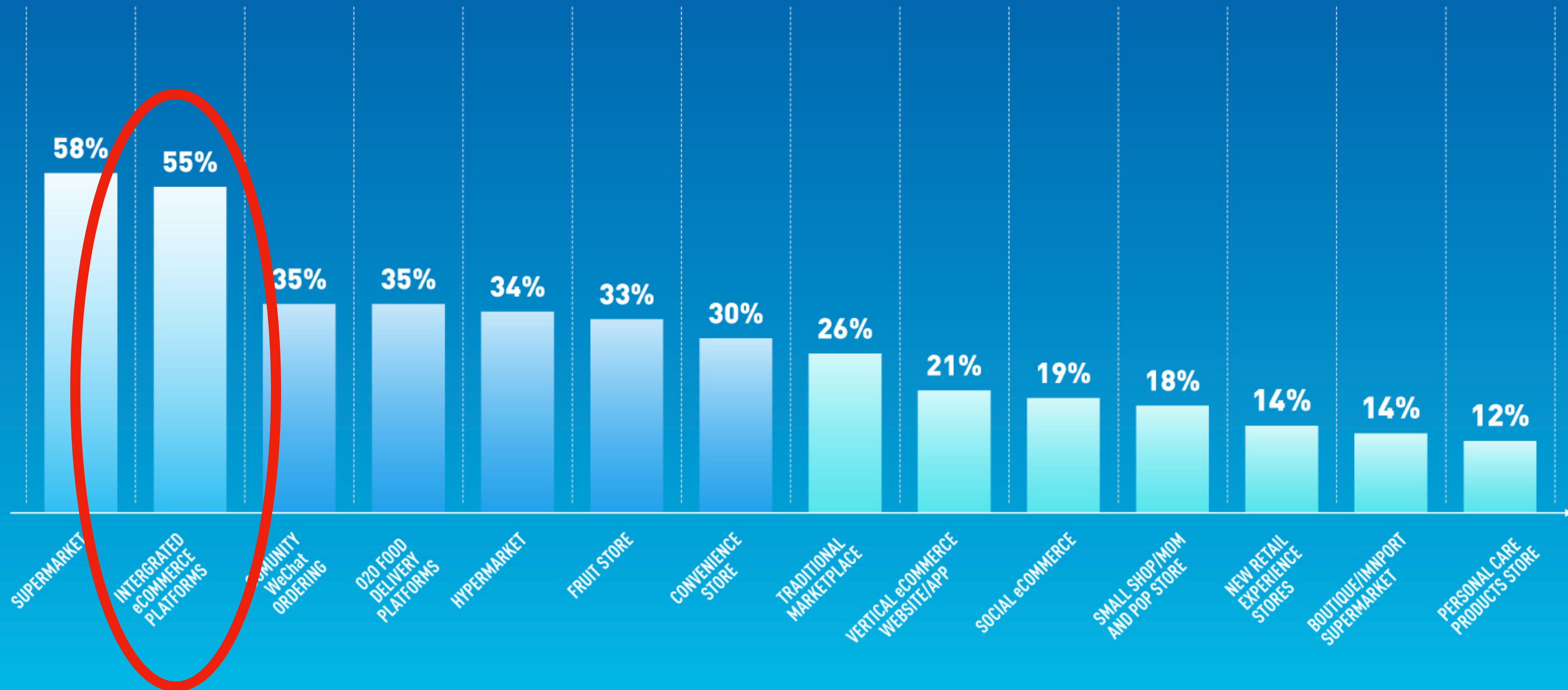
(N=1093)



SWITCHING MINDSET: CHANNELS

PURCHASING CHANNELS CHOSEN BY CONSUMERS DURING THE PANDEMIC

(N=1093)



INTIME
LOTTE
DEPARTMENT
STORE

乐天

INTIME LOTTE

尖货代购招商电话: 136011043

GUCCI

乐天银泰百货

GUCCI

GUCCI

GUCCI

GUCCI

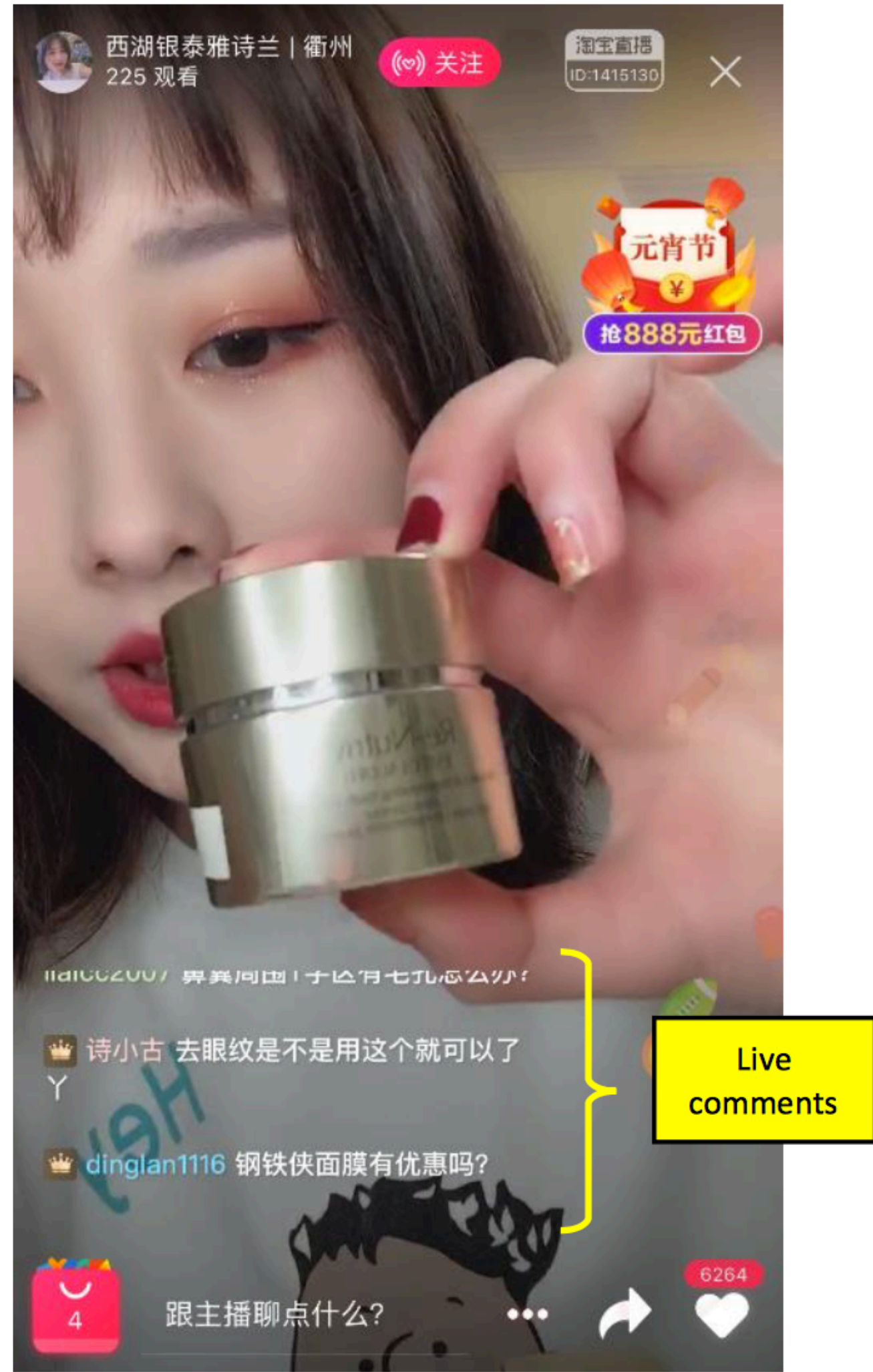
GUCCI







Live streaming channel



Live comments



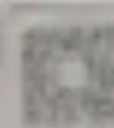
Products introduced during the show

Graphic: FBIC Group

三重高能防护 敏肌抵御光老

小会刚Plus 全新升级

敏感肌系列
N°1



EAU THERMALE
Avène













The packages cost £10, plus £3.50 for postage and packing -



川湘缘 | 杨归
3056 观看

直播回放
ID:117738



Look at this! So juicy!



平价直入 >
1 名 帮TA冲榜

L'ORÉAL
PARIS



双11当天
法国旅游卡、戴森
ipad、iphone
8号冲榜送豪礼
*确认收货后不退不换
才能拿到冲榜礼哦!

TOP1——ipad
TOP2&3——施华洛世奇项链
TOP4&10——淡纹CP组合
(紫熨斗、零点霜正装)

直播间抽奖

¥50 大额券
满299使用

复颜5件套
复颜柔肤水22ml*2
复颜日霜15ml*2
复颜眼霜5ml

镇店之宝

1号宝贝

抢1买50ml送67.5ml

z***3 正在去买

丝也是推荐第一套吗?

铁粉1 smile曼 66 33岁适合哪款护肤品?

铁粉1 李二硕 1993 紫熨斗现在还有赠品吗 付定金的

新粉2 存在的高傲 10号付订金会有赠品吗

新粉1 泥玩斋 16.5万

跟主播聊点什么?

平价直入 >
1 名 帮TA冲榜

L'ORÉAL
PARIS



双11当天
法国旅游卡、戴森
ipad、iphone
8号冲榜送豪礼
*确认收货后不退不换
才能拿到冲榜礼哦!

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复颜柔肤水22ml*2
复颜日霜15ml*2
复颜眼霜5ml

镇店之宝

1号宝贝

抢1买50ml送67.5ml

曾红娟52 来了

十三秒9 欧莱雅大卖

钻粉2 ks妄想 欧莱雅大卖

新粉1 妖苒夕 3和19区别

新粉3 洪语童洪铭睿 手都抽筋了,居然没有

新粉2 @-Miss王 好难

新粉1 小啍萌 欧莱雅大卖

跟主播聊点什么?

平价直入 >
1 名 帮TA冲榜

L'ORÉAL
PARIS
巴黎欧莱雅



双11当天
法国旅游卡、戴森
ipad、iphone
8号冲榜送豪礼
*确认收货后不退不换
才能拿到冲榜礼哦!

TOP1——ipad
TOP2&3——施华洛世奇项链
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复颜5件套
复颜柔肤水22ml*2
复颜日霜15ml*2
复颜眼霜5ml

镇店之宝

1号宝贝

抢1买50ml送67.5ml

新粉1 我们的爱在... 来了

新粉2 卡奇诺叶子 欧莱雅大卖

Zz小橘 欧莱雅大卖

新粉1 153淘气 欧莱雅大卖

新粉1 找话题 欧莱雅大卖

铁粉1 妮子客栈 欧莱雅大卖

新粉1 wangning19940926

跟主播聊点什么?

HEALTH
TECHNOLOGY
COMMERCE
BRANDING
HABIT

THE TAKEAWAYS...

1.

RETAILERS AND BRANDS
THAT LEVERAGE NEW
FEATURES AFFECTING
ROUTINE CREATE VALUE.

2.

THIS IS GOING TO
HAPPEN TO US AGAIN.

Epidemiologists brace for 2nd wave of COVID-19 – and it may come in September



Now's no time to become complacent about COVID-19, experts warn



[Laura Glowacki](#) · CBC News · Posted: May 20, 2020 4:00 AM ET | Last Updated: May 20

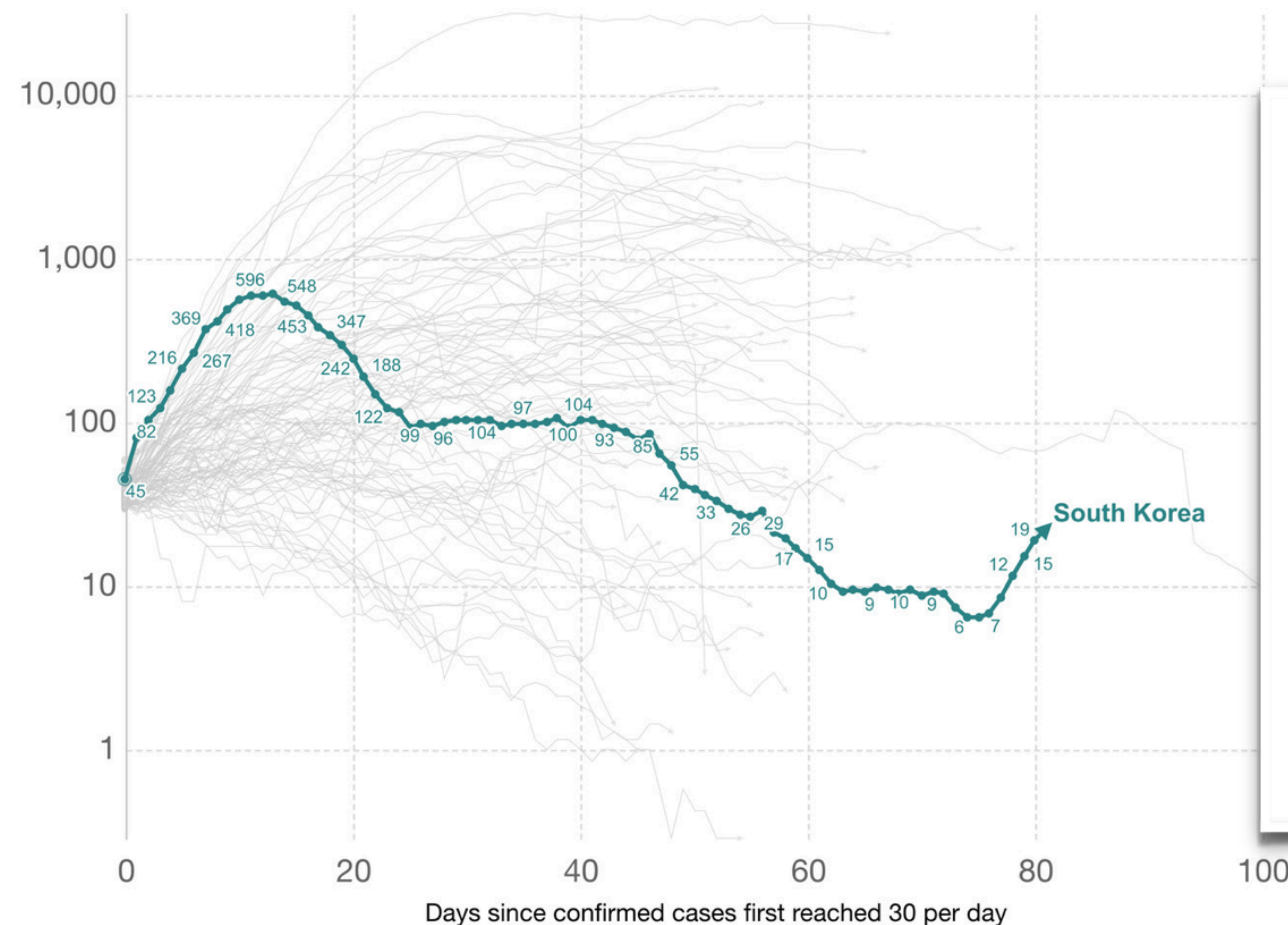




Daily confirmed COVID-19 cases: are we bending the curve?

Because not everyone is tested the total number of cases is not known. Shown is the 7-day rolling average of confirmed cases.

Our World
in Data



Source: European CDC – Situation Update Worldwide – Last updated 13th May, 11:15 (London time)

OurWorldInData.org/coronavirus • CC BY

Germany and South Korea excelled at Covid-19 containment. It still came back.

The coronavirus crisis won't be over until the world has a vaccine or a cure.

By Dylan Scott | @dylanlscott | dylan.scott@vox.com | May 13, 2020, 2:10pm EDT

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Vox



Businesses started to reopen in Germany and South Korea and now the countries are seeing a worrying increase in coronavirus cases. | Bodo Marks/picture alliance via Getty Images)



MOST READ



3.

CONTINGENCY

CREATES

OPPORTUNITY.

LESSONS FROM THE FUTURE:

PHYSICAL GROCERY WILL STILL MATTER.

ECOMMERCE WILL GROW - TO A POINT.

TAKE ADVANTAGE OF THE “SWITCHING MINDSET.”

COMMERCE CONTENT / LIVESTREAMING IS AN UNTAPPED OPPORTUNITY.

DTC IS UNDERDEVELOPED IN CANADA.

CONTEXTUAL RELEVANCY AT RETAIL DRIVES CONVERSION.

@JASONDUBROY

Questions?