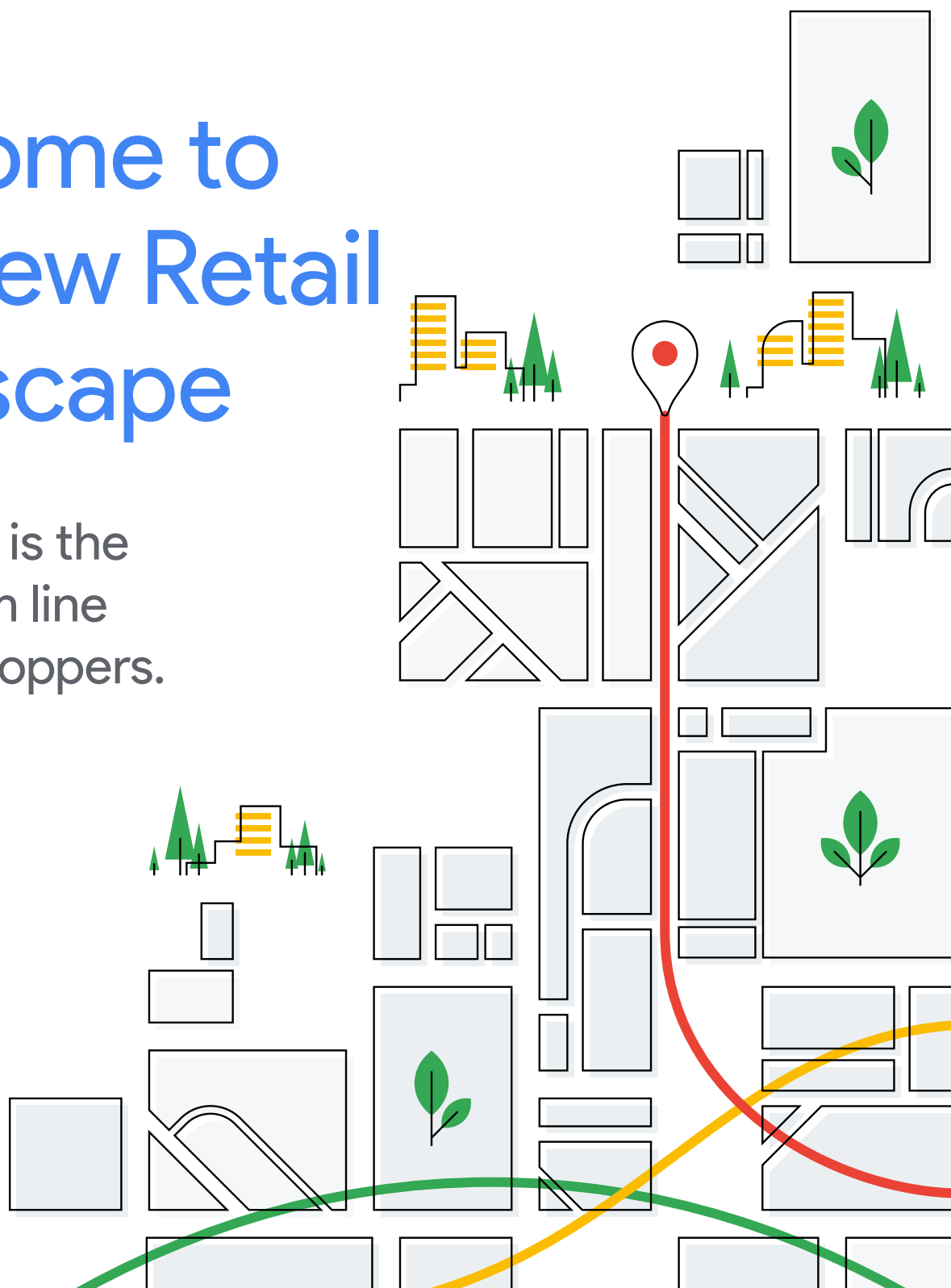


# Welcome to the New Retail Landscape

Experience is the  
new bottom line  
for retail shoppers.



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# Welcome to the new retail landscape



## Experience influences the entire customer buying journey and can make or break purchasing decisions.

The rise of omnichannel shopping reshaped retail. Customers are equally at home online and in stores while buying more on average than their peers who prefer a single approach.<sup>1</sup> They're tech-savvy by nature, making them especially open to new experiences and hungry for innovation.<sup>2</sup> They're also reachable via more channels than any other digital and physical cohort; the more channels they use, the more they tend to spend.<sup>3</sup>

And on top of all that, the transformative impact of a changing economy and changing experience expectations are placing more pressure on retailers to stand out in the crowded landscape and succeed while customers continue to expect ease and flexibility while browsing, speed at checkout, and reliability when it comes to delivery.

In the rapidly evolving landscape of the digitalized global supply chain, customers continue to demand fast and complimentary shipping services. Retailers who manage their own supply chain struggle to meet these expectations due to labor shortages of drivers and field technicians. Simultaneously, the economic downturn challenges responsible businesses to focus on increased profitability while they continue searching for ways to reduce their carbon footprint.

Businesses can optimize their supply chains by investing in advanced technologies that streamline processes, reducing delivery times and costs, to deliver the free 1-2 day shipping customers have come to expect. Investing in technology also attracts and retains top talent in the workforce. By implementing tools that facilitate the work of drivers and field technicians, companies can not only enhance job satisfaction but also ensure a more seamless and productive operation. In addition, a commitment to sustainability can be achieved by evaluating and investing in technologies that reduce carbon emissions and associated costs, aligning the business with environmentally conscious practices.



<sup>1</sup> eMarketer, "US Omnichannel Retail StatPack 2018"

<sup>2</sup> McKinsey, "Ready to 'where': Getting sharp on apparel omnichannel excellence"

<sup>3</sup> Harvard Business Review, "A Study of 46,000 Shoppers Shows That Omnichannel Retailing Works"

## Customers will no longer tolerate sub-par digital shopping experiences.

As the shopping landscape continues to evolve consumers are acting more thoughtfully on how to spend their money while their expectations scale higher than ever. The fact is, shoppers have never had more options—more ways to get inspired, more ways to research, and more ways to buy. With a more thoughtful shopper, a clear channel of choice is a thing of the past, and with increasing experience expectations, the path to purchase becomes much more unpredictable, in turn evolving into a journey of infinite combinations and permutations across shoppers.<sup>4</sup>

## The power of location

The convergence of shifting consumer expectations and pivots is creating a period of pressure across the retail landscape. This includes pressure on businesses to drive more performance with fewer resources, pressure to remain competitive against an increasingly savvy retail peer group, and adapting to the price pressures on shopper wallets, as they need to make every dollar go further.

At the heart of these challenges is geospatial intelligence—the maps, routes, and places that make up the world you share with your customers. Google Maps Platform has created a new set of Environmental APIs: [Solar](#), [Air Quality](#), and [Pollen](#) to help you and your customers adapt to new environmental realities. When combined with your internal data, geospatial intelligence makes it possible to understand those customers in new ways, bridging the online and offline worlds and creating a seamless omnichannel experience.

[Unlocking Value with Location Intelligence](#) explores how this technology is transforming key use cases in businesses across the world, including retail. According to the study, just **18% of retailers** have implemented mature geospatial intelligence strategies. This translates to an opportunity for everyone else.

Among its many applications, the role of **geospatial intelligence** is most clear across the customer journey. From checkout to delivery, there have never been more ways to connect customers with the products they want most—and the journey has never been more complex. Whether it's reducing friction in the user experience or ensuring a package lands on the right doorstep, it's much easier to go wrong than to get it right.



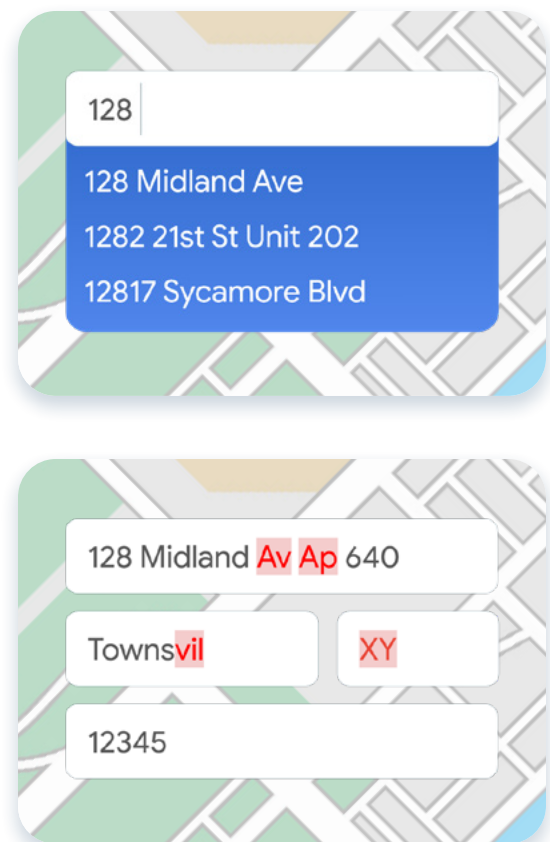
<sup>4</sup> McKinsey & Company Harvard Business Review, 2020

Shoppers engage with 3D imagery 50% more than static ones,<sup>5</sup> which presents a big opportunity for brands. **Immersive experiences** help while exploring a place or an area, and navigating to a specific location. They also create new opportunities and offer branded AR experiences. Highly customizable [Map Tiles](#) give retailers the flexibility to design interfaces and interactions unique to their brand and design requirements. They also overlay data and graphics to customize customer visualizations. For the days your customer just can't make it there, these features can help bring that experience to them. We continue working on ways to make online shopping more engaging, so your customers can continue to get their shopping done with confidence.

## Becoming more data-driven and customer-centric.

Research has shown that the process of entering an address is one of the biggest bottlenecks in completing a purchase. Addresses are critical information for both delivery and billing, but inconvenient to type, especially on mobile devices, leading to a slow, error-prone process. [Autocomplete](#) makes checkout easy and fast because your users can choose from a menu of predicted addresses as they type, dramatically reducing mistakes from manual entry. [Address Validation](#) makes it easier to correct addresses proactively and better predict delivery challenges. This reduces failed and missed deliveries, minimizing costly complications in the process, and provides easy integration with existing billing, marketing, and customer relationship management systems.

With these products, you gain access to Google Maps Platform's global coverage and scale that you can trust, further allowing you to access geolocation details beyond postal data; you can also leverage details from points of interest (POIs) in Google Maps. Users may not always have the exact address of a location in mind; the ability to search for popular landmarks or building names allows users to find and validate an address, even when the exact address components are not inputted.



<sup>5</sup> Google, "Use new AR features to shop for beauty products and shoes"

As customers rediscover the convenience of neighborhood stores, retailers are recognizing their unique ability to deepen brand loyalty with an effective store locator.

Geospatial intelligence can close this gap by making local inventory an intuitive part of the customer journey, even online. With [Product Locator](#), the availability of a product near the customer can be integrated directly into the product page as a list of nearby locations, sorted by distance, making the full range of pickup options clear. Alternatively, stores carrying the item can be visualized on a Google map, integrating the full scope of Google Maps Platform features and usability into the product browsing process.

Product and [Store Locators](#) provide the opportunities to give the right context to consumers to drive them to your store. With Google Maps Platform retailers now have the tools to turn these user journeys into immersive experiences,<sup>6</sup> which has been shown to attract Gen Z consumers.

## Stay ahead of delivery challenges

Retailers are invested in being the best at what they do, but effective delivery is critical to their success. They spend years optimizing the selling of their goods, whether it's food, clothing, electronics, or something else entirely—not mastering the ins and outs of fast and efficient delivery. But successful delivery is also putting pressure on virtually every retail sector. What if you could simply integrate scalable, cost-effective delivery?

We offer exactly that: we've spent years mapping the world and studying the fundamentals of routing—what every business must offer, both operationally and for their customers, regardless of industry—and channeled our experience, resources, and infrastructure into a delivery solution you can incorporate into your operation.

To address the pick-up experience Retailers are leveraging [Distance Matrix](#) to improve ETA forecasting for consumer arrival at the store. This benefits customers and operations team as well. To improve the delivery experience, we provide [Route Optimization](#) and [Mobility](#) services to enable a fully optimized fleet operation and delivery experience from fleet planning to last-mile delivery. From beginning to end, we prioritize visibility into each experience.



<sup>6</sup> Forbes, "Generation Z Gravitates Towards Immersive Tech-Driven Experiences"

Our mobility solution includes powerful tools for accelerating and validating address entry, specifying a precise access point within a location, generating accurate ETAs based on current road conditions, and providing high-resolution maps—fast-loading, fast-rendering, and flexibly customized—with real-time route tracking. We bring this same emphasis on transparency to the fleet management experience as well, where our flexible infrastructure and powerful analytics capabilities bring even the biggest fleets into focus.

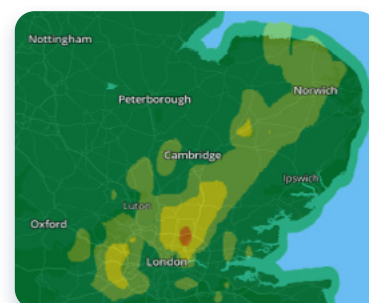
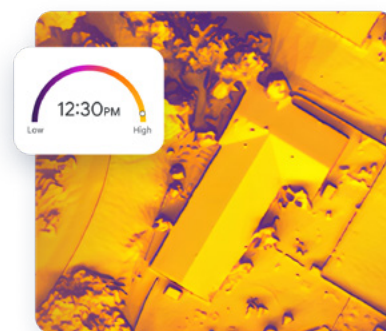
Keeping up with the mobility demands of today's customers has never been more challenging, but the rewards for those who do are significant. Whether you're looking to transform customer and driver experiences, accelerate growth, or upgrade your operations, maximize what your fleet can do with real-time visibility and insights into performance. So your customers stay engaged and informed, your drivers stay loyal and on track with more accurate ETAs, and your business stays operating at its peak.

## Drive sustainable operations, offer healthy consumer choices

When it comes to the environment, sustainability is no longer a choice. It is a mandatory part of doing business. Now more than ever, it's important to continue our efforts to reduce our environmental impact. Over the years we have evolved what a map can do. Now we're expanding what developers can do with Google Maps Platform to build experiences that pave the way for retailers and their customers to help drive a more sustainable future.

Now we're expanding our sustainability offerings with [new products in Google Maps Platform](#). These products apply AI and machine learning, along with aerial imagery and environmental data, to provide up-to-date information about [solar](#) potential, [air quality](#), and [pollen](#) levels. Developers, businesses, and organizations can now build tools that map and mitigate environmental impact.

With our new sustainability tools, businesses can access comprehensive and up-to-date environmental information to develop products and services to help people adapt to the impacts of climate change. We're dedicated to building tools that organize environmental information and make this data useful for companies, cities, and partners so we can all take collective action.





# Leverage the best of Google's mapping technology and data for your business

## **We provide maps of more than 250 countries and territories.**

But we can zoom way, way in as well: with on-the-ground detail spanning more than 60 million kilometers of roads between them. Beyond a picture of what the world looks like, we're also mapping what it does. That includes real-time data like traffic, road conditions, and environmental conditions, as well as 200 million businesses and places and local guides on every continent. We bring the best of Google's mapping technology to brands like yours.

We are relentlessly mapping the world and can deliver the freshest most comprehensive map of the world. The world never stops changing so we never stop mapping it. This means we ensure that you can serve users around the world with a reliable location-based experience using the map they know and love.

Learn more about Google Maps Platform [Retail solutions](#) and [contact us](#) if you have any further questions.

