DECEMBER, 2017

Special Edition White Paper

From Omni-Channel to Frictionless Retail

Insights on Today's Consumer With Advice and Tips for Retailers

Developed by

Retail Council of Canada

Conseil canadien du commerce de détail

Prepared in conjunction with

WisePlum

Microsoft

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INTRODUCTION

MESSAGE FROM RETAIL COUNCIL OF CANADA

The following White Paper summarizes the results of a Canadian retail study conducted in 2017 in partnership with research tool WisePlum, Microsoft Canada Inc, Retail Council of Canada (RCC) and RCC's Marketing Advisory Committee. The study surveyed 5,000 Canadian consumers to get insights on their shopping preferences, their expectations and their needs.

The White Paper also provides retailers with a better understanding of what consumers expect when shopping in-store, on a mobile device or online. It explores the attitudes and experiences of Canadian consumers across the entire shopping journey, regardless of channel.

Additionally, it examines the similarities and differences across generation, region, urban versus rural, and retail verticals. And finally, it provides retailers with insights to help them better compete in an ever-changing retail environment.

The White Paper looks at:

- Canadian consumers' attitudes and expectations when shopping in a bricks-and-mortar and/or with an online retailer;
- Why Canadian consumers choose a specific channel and what drives their channel preference;
- How retailers can respond to consumer needs and expectations regardless of channel; and
- How retailers can eliminate friction points in the path to purchase to enrich the customer experience and to increase loyalty.

If you have any questions about this study, please contact me at djbrisebois@retailcouncil.org or call toll free 1 888 373-8245. To download the complete study, visit RetailCouncil.org/research.

To access more Retail Council of Canada's member exclusive resources, we encourage you to join the association. Membership information can be found at RetailCouncil.org/join-today.

Kind regards,

Diane J. Brisebois
President and Chief Executive Officer
Retail Council of Canada

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EXECUTIVE SUMMARY

Technology has forever changed consumer shopping patterns. The ability to shop and receive products wherever, whenever, and however has created, in the customer's eye, the expectation of a frictionless shopping experience. The consumer does not see or care about a retailer's specific channel - the consumer cares about the experience and the ease by which a product can be purchased regardless if it is done in-store, on a mobile device or online.

The study clearly shows that speed and convenience — not just price and brand — are differentiators in a world competing on customer experience. Retailers would be wise to understand these qualifiers are as important in a bricks-and-mortar environment as they are in a virtual store.

Today, customer interactions are continuous, highly personalized and ever-changing, regardless of whether the consumer is on a mobile phone, talking to a voice-activated service such as Alexa, or hailing a cab. Consumers want an experience that transcends channels and devices.

The goal is to provide customers with the ability to interact and shop across channels, creating a seamless, fluid and frictionless brand experience.

Great, smooth customer experiences in all channels is the new normal. Contrary to recent sensationalized headlines about the demise of bricks-and-mortar stores, the study clearly demonstrates Canadian consumers embrace all channels, including physical stores, and expect a seamless experience regardless of where or what they buy.

a. Key Insights for Retailers

1. Your customers are on the move, and it's up to you to meet them wherever they are and, most importantly, wherever they're going next. Remember that to remove friction, you must start by being where your customers want you and need you to be.
2. Consumers want an experience that rises above the channel of device used. The goal is to provide them with the ability to interact and shop across channels, creating a seamless, fluid and frictionless brand experience.
3. Consumers today demand the hyper-personalization of everything. Personalization is what happens when a retailer can both leverage a deep understanding of a consumer's preference and anticipate his or her needs.

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For example, consider how some retailers are using augmented reality to personalize and shape customer experiences.

4. Retailers who build digital experiences that enhance or simplify their customers' lives through understanding and addressing their bigger needs – not just the ability to execute a transaction - will win.
5. Traditional retailers need to turn physical stores into assets rather than liabilities. These assets need to include entertaining, exciting, and emotionally engaging experiences that set you apart from an online retailer with no physical presence.
6. The path to eliminating friction and increasing engagement may seem intimidating; digitalization doesn't stop at your website or mobile apps. It involves customer-facing interactions and, often, how your retail business operates on the back end. Creating on-demand services shouldn't be left to Uber and Airbnb, and offering in-app augmented reality (AR) features shouldn't be limited to Snapchat or Amikasa.
7. Retailers must become early adopters of emerging technologies and practices. Embracing an 'analytics first' mindset to leverage customer and organizational data with analytics solutions, allows retailers to boost sales in a world where consumers seek instant gratification.
8. Retailers must think beyond retail to find inspiration and ideas to stay ahead. Think of, for example, leveraging push notifications or chatbots to smooth out the customer experience or solving customer service issues more quickly for frustrated shoppers. Think of tapping augmented reality or simpler mobile interfaces to better engage with would-be buyers or upsell products. The technology itself won't be the cure-all. But good things happen when retailers leverage technology, take risks, and innovate. The results are often improved, frictionless customer experiences.

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UNDERSTANDING YOUR CONSUMERS AND HOW THEY SHOP

Retail in Canada generated more than $350 billion in annual sales (excluding auto and gas) in 2016, and currently employs more than 2.1 million Canadians, representing the largest private sector employer and the largest private sector revenue engine within the Canadian economy. When retail changes, Canada changes. And retail has changed!

Driven by consumers' evolving lifestyles, retailers are discovering that speed, convenience, selection, service, access and value for price are all key elements in the successful path to purchase. New technologies have allowed consumers to access such services as digital payment options, instant inventory checks and price comparisons, 3-D product viewing, virtual consultants and all these innovations are re-defining the customer experience.

But let's be clear – providing a seamless personalized shopping experience is not for the weak or the lazy. As the study suggests, shoppers not only have different expectations of online and bricks-and-mortar shopping - and expect that retailers can adapt to reflect those different needs and wants throughout the path to purchase - they also have different preferences for how they shop depending on the actual item they are considering buying.

> "One of our biggest challenges has been working with our online business to create an experience that is equivalent to what we have in store. That's very difficult to recreate because of the personal interaction and consultative nature that our in-store associates provide to every customer."
>
> – Gillian Stein, CEO, Henry's

The percentage of problems encountered with online transactions, for example, far exceeds that of in-store purchases, and yet, this does not dissuade online consumers from referring friends to an online store versus a bricks-and-mortar store. The path to purchase has never been more complex with an astounding 77% percent of all in-store purchases influenced in some way by digital, according to Google/Ipsos. Retailers who can wade through these complexities can capture and develop modern consumer loyalty.

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"One of our biggest challenges has been working with our online business to create an experience that is equivalent to what we have in store. That's very difficult to recreate because of the personal interaction and consultative nature that our in-store associates provide to every customer." – Gillian Stein, CEO, Henry's.

Strong retailers are finding ways to bring customer experiences to life in all channels. For example, Sephora has done a great job of creating personalized experiences for customers - connecting online and offline engagement strategies - using tools like augmented reality to allow shoppers to try on different looks via their phone. They have successful consumer communities and do a remarkable job of marrying content with products. Sephora leverages data from the beauty insider program to customize every aspect of the consumer's experience.

The study indicated convenience is also king in today's retail world. Consumers lead busy lives and their time is becoming more limited every day. To keep up with them, retailers are increasingly finding they need to innovate in ways that make it easier and more convenient for their customers to get what they need with the least amount of friction.

As a format, bricks-and-mortar continues to maintain a strong footing with consumers,

"What is interesting right now, and it is significantly more pronounced this year, is that consumers, because of the immediate availability of on-line product, are shopping only when they need something. If they want something, they expect it tomorrow. As a result, traditional retail patterns are being upended and sales trends are incredibly volatile which is making it tricky to staff stores and manage inventory loads."

- David Labistour, CEO, MEC

particularly as retailers diversify their available store configurations for specific consumer needs and other channels they offer. For example, many retailers with physical real estate have emulated what online retailing offers by promoting "click & collect" options – and by taking advantage of multiple locations to respond to the convenience factor. This "click & collect" option deals head-on with what consumers identify as irritants when shopping in a physical store.

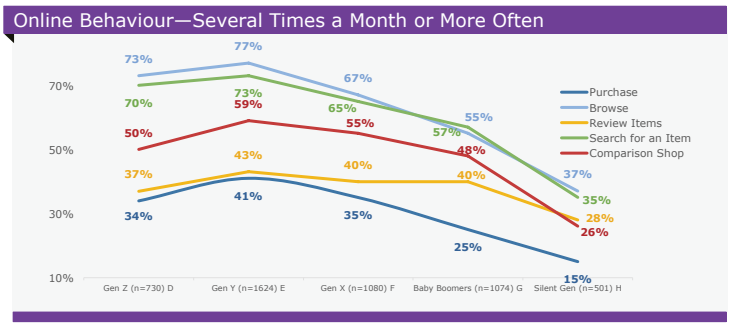
Long check-out lines, no in-store staff available, no stores close to home were the top physical store annoyances cited by consumers in the study. Nonetheless, bricks-and-mortar retailing remains the preferred way to shop for consumers in every age group, regardless of gender.

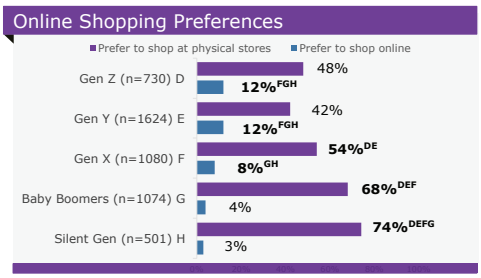
Men adopt new technology slightly earlier and shop more in physical stores given the instant gratification the format more immediately delivers. Women tend to use technology more often to research and tend to shop online slightly more than men. The survey showed women, far more than men, use their cellphones while shopping to price check, compare products, read reviews, gather opinions from friends, etc.

"What is interesting right now, and it is significantly more pronounced this year, is that consumers, because of the immediate availability of on-line product, are shopping only when they need something. If they want something, they expect it tomorrow. As a result, traditional retail patterns are being upended and sales trends are incredibly volatile which is making it tricky to staff stores and manage inventory loads." - David Labistour, CEO, MEC

Gen Y is the most engaged in shopping and purchasing online and fuels most of the growth over the next 12 months.

- **In-store experiences are important to shoppers, particularly Gen X, Baby Boomers and Silent Gen.**
- **The increase in online purchases will come from Gen X and younger, with Gen Y driving the majority of growth.**





Net Change in Online Spending Next 12 Months (% More - % Less)

+3%
+8%
+2%
-5%
-25%

Superscript A, B, C, etc. indicates a statistically higher percentage than the denoted group at the 95% confidence level
Base: Total, QP2: How often, if at all, do you purchase, browse, review, search, comparison shop with Online Retailers?
Base: Total, QP16 Overall, do you prefer to shop at physical stores or online stores? .
Base: Total, P17: Thinking about all the purchases of any products you made online during the last twelve months, do you expect to spend more, about the same, or less in the next twelve months?

(Source: WisePlum, 2017)

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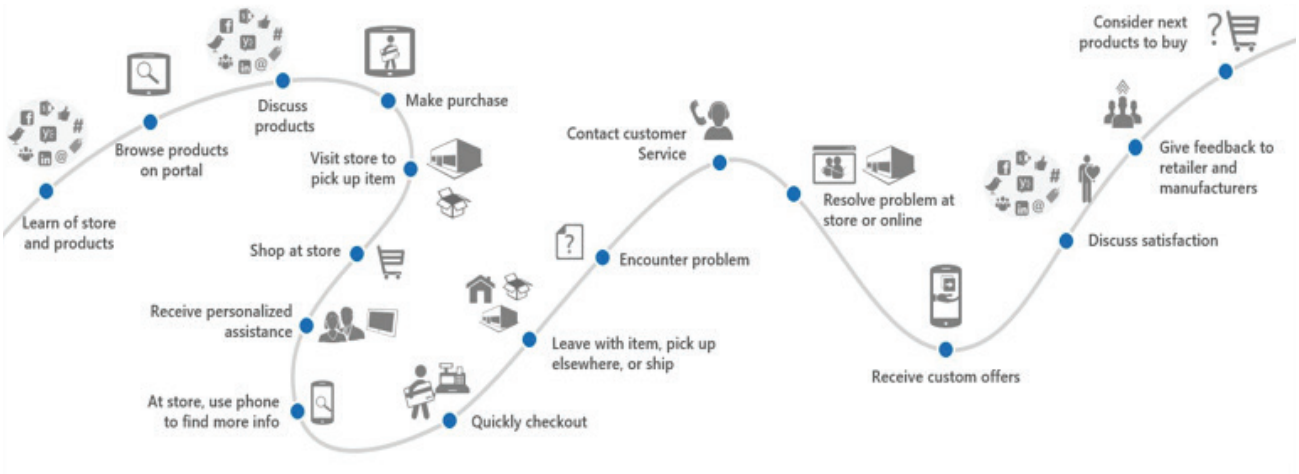
IMPACT OF CONSUMERS' EVER-CHANGING PATH TO PURCHASE PREFERENCES

Regardless of the type of retailer, the customer journey is changing. It is gaining more touch points and consumers are treating different channels as short stops on their way to making a purchase.

Retailers that collect customer data on every step of the journey have a competitive advantage. Doing so can increase their ability to identify and fix problems that prevent customers from making purchases. Retailers obsessed with understanding and analyzing the customer journey are also able to close the gap on shoppers who visit a store without buying something.



(Source: Microsoft Canada Inc, 2017)

Bricks-and-mortar retailers need to capture customers at the beginning of their journey—long before they decide to make a purchase. Most customers today make their decision of where to shop before they go shopping - in nearly every category of bricks-and-mortar store type. Of all categories, grocery is the most highly planned visit, with 71% of consumers choosing the retailer before heading out the door. Bricks-and-mortar stores also continue to capture most retail sales in every major vertical. In discount, grocery, and department stores, more than 90 per cent of sales happen in the store. For mass merchandisers and specialty stores, about a quarter of sales happen online.

Online retailers are confronted with converting browsing shoppers into actual purchasers in higher numbers and handle steep logistics expenses for

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shipments and returns. Major e-commerce players like Amazon continue to grow because they can continually transform themselves to adapt to unpredictable consumers and the rapidly evolving retail environment. Retailers like Amazon are using big data and analytics solutions to make smart merchandising decisions, improve demand forecasting capabilities, increase operational efficiency, gain valuable social media insights, etc. They become part and parcel of the consumer's path to purchase. They are where their consumers want them and need them to be!

Lack of sales associates and register line-ups are top problems experienced in-store.

Geographic location of physical stores and pricing are top problems among those purchasing online.

- **Not having items in stock or available online are top problems for Department Stores.**

In-Store

Problems Experienced—**Before** Purchase

Top Problems	Grocery (n=1158) A	Mass Merchandiser (n=738) B	Discount Store (n=313) D	Department Store (n=648) E	Specialty Store (n=1104) G
It was hard to find the item/s that you wanted	6%	8%	7%	8%	7%
The item/s that you were looking for were out of stock	6%	**8%[A]**	6%	8%	6%
No sales associate was available to help you make this purchase	5%	**11%[AEG]**	**9%[A]**	**8%[A]**	6%
There were no stores close to you	4%	**9%[A]**	7%	**7%[A]**	**8%[A]**
The line at the register was too long	**8%[G]**	**9%[G]**	9%	**14%[ABDG]**	6%

Online

Problems Experienced—**Before** Purchase

Top Problems	Mass Merchandiser (n=337) C	Department Store (n=69) F	Specialty Store (n=568) H
The item/s that you were looking for were out of stock	12%	**23%[CEH]**	**11%[G]**
There were no stores close to you	**22%[B]**	**24%[E]**	**23%[G]**
The price online was different from the price in the store	**24%[H]**	**20%**	**15%**
The product you wanted was not available online	**11%[H]**	**20%[H]**	6%
You could not order an item online and have it delivered to a local store	17%	15%	11%

Shading highlights top mention for Retailer
Superscript A, B, C, etc. indicates a statistically higher percentage than the denoted group at the 95% confidence level
Base: Total, Q90: Thinking again of your most recent purchase experience did you encounter any of the following problems when getting ready to purchase this item/these items?

(Source: WisePlum, 2017)

a. Gratification and the In-Store Experience Imperative

For consumers who like instant gratification, nothing beats bricks-and-mortar.

These consumers want to browse, compare prices, read flyers and touch products. That's why they shop in-store. They can get a sensuous experience, and they can get it fast.

In-store consumers initiate 2.7 activities on average before completing a purchase

(Source: WisePlum, 2017)

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The study shows in-store shoppers initiate 2.7 activities on average before completing a purchase. However, problems with long line-ups, lack of available staff, and other convenience related problems still exist within the in-store environment that can frustrate the buyer that's looking for immediate appeasement.

McKinsey and Company's 2017 article entitled *Meeting millennials where they shop: Shaping the future of shopping malls* pointed out that consumers are appreciating curated retail concepts. Rising demand for cooking classes, health and wellness sessions, and makeup tutorials means retailers must look at their physical space as experiential and entertaining environments. This recognition that consumers - including younger shoppers who are more likely to consider buying online - see the value of a physical store has retailers rethinking their bricks-and-mortar locations and even reconsidering their e-commerce strategies.

Top 4 Activities Initiated Before Purchase (in-store):

1. Browse for products
2. Compare prices in store
3. Browse paper flyers
4. Touch products

(Source: WisePlum, 2017)

An example is Starbucks, known for its great mobile commerce strategy, recently closed its online store to focus on the bricks-and-mortar experience. With an emphasis on experiential retail, Starbucks is seeing its highest in-store revenues and has successfully married the bricks-and-mortar strategy with a digital-mobile experience recognizing the need for a quality product, community and connection/connectivity within its physical space.

In addition to the in-store experience, retailers are curating special activities associated with the physical store space even outside their four walls. For example, Mountain Equipment Coop (MEC), organizes a range of different outdoor activities such as guided mountain bike trips.

While Walmart is competing head-on with Amazon, it is not neglecting its physical stores in favor of its e-commerce strategy. Walmart's focus on its bricks-and-mortar stores is part and parcel of its mantra that promises a quicker and easier shopping experience. Walmart is also tweaking its inventory management with technology and shifting overnight stocking hours to the daytime at many stores so that shoppers can benefit through having more sales staff available to answer questions, generally service customers better and help ensure the products they want are available.

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Other retailers are creating store formats using simulated reality tools to provide consumers with more interactive retail experiences. Some of these tools include touchscreen navigation panels, virtual fitting rooms, magic mirrors, and augmented-reality zones.

As Thierry Hay-Sabourin, Vice-President of e-commerce at Best Buy, said when he sat down with *Marketing Magazine*, "We don't see the customer as the in-store customer or the online customer. They are just the customer!"

b. Convenience and Information as the Online Requirement

Online experiences take longer, with customers initiating an average of 3.4 activities before making a purchase. These customers want to price shop, read reviews, compare product details, and search for information online. These customers are driven by convenience and the hunt for special online prices and promotions.

The learning is overwhelmingly that for retailers to succeed today, they need to facilitate seamless experiences that span the digital and physical worlds and provide personalized customer-care each step of the way.

Top 4 Activities Initiated Before Purchase (online):

1. Compare Prices
2. Read Product Reviews
3. Browse for information using a search engine
4. Compare product details

(Source: WisePlum, 2017)

Online experiences take longer, with consumers initiating an average of 3.4 activities before making a purchase.

(Source: WisePlum, 2017)

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MULTI-CHANNEL SUCCESS STRATEGIES

a. Recognizing the Different Online and In-Store Drivers

Online shoppers want low price and convenience and in-store customers want value and convenience. This duality is forcing both omni-channel and pure-play online retailers to look beyond only optimising for traffic and conversion.

Retailers, including Amazon, are learning that online selling focused solely on the sale will not succeed for much longer. Interaction and personalized service are now the mainstay of any successful online business. Understanding and playing a meaningful role in the consumer's purchase journey are important components of online and omni-channel success.

The big question is how does a retailer entice customers away from the current leaders in online product searches and purchases. Interestingly, setting aside specific technology requirements, it is similar to what is required in a vibrant and exciting bricks-and-mortar environment. It comes back to meaningfully and authentically engaging consumers throughout their journeys by focusing on adding value and building relationships that mirror lifestyle, preferences and needs.

Retailers focused on delivering memorable experiences understand what consumers want beyond just making a purchase. Shoppers want answers to their questions, they want information and content that relate to their needs, and, they want to be inspired.

> "Our business is all dependent on our expertise and the ability to tailor our approach to the uniqueness of the customer and that's not always easy to translate online. The ability to touch and try products is also a challenge in the digital space because the gear we carry often requires the user to try it out to see if it works for them which you obviously can't get online in the same manner"
>
> - Gillian Stein, CEO, Henry's

More than anything else, personalization in a virtual setting is key. If retailers can establish trust and brand awareness in addition to using personalisation to build a one-on-one relationship, they can become part of the customer journey from beginning to beginning (not to end).

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Retailers need to offer the unique experiences customers seek in their channels of choice. However, providing a frictionless path to purchase, regardless of channel, provides the ability to maximize every consumer preference, whether they have channel loyalty or not.

The drivers of online and in-store preferences are split along price and value. In the bricks-and-mortar environments, consumers pick retailers based on who can give them good value for their money. In department stores, more shoppers (24%) seek out "value" than "lowest price" (12%). Only one retail vertical—grocery—bucks the trend, with most of grocery shoppers (21%) saying they choose stores based on the store's proximity to work or home. In every other vertical, value matters most.

Consumers have historically been willing to pay more for a better-quality product. However, increasingly, overall customer experience, service from in-store staff (both pre-and-post purchase), and convenience are factored into the equation when consumers decide which retailers offer good value, and which do not. When it comes to online shopping, most consumers choose retailers based on who offers the lowest price. However, online shoppers also care about value, convenience, and free delivery.

"Our business is all dependent on our expertise and the ability to tailor our approach to the uniqueness of the customer and that's not always easy to translate online. The ability to touch and try products is also a challenge in the digital space because the gear we carry often requires the user to try it out to see if it works for them – which you obviously can't get online in the same manner". - Gillian Stein, CEO, Henry's.

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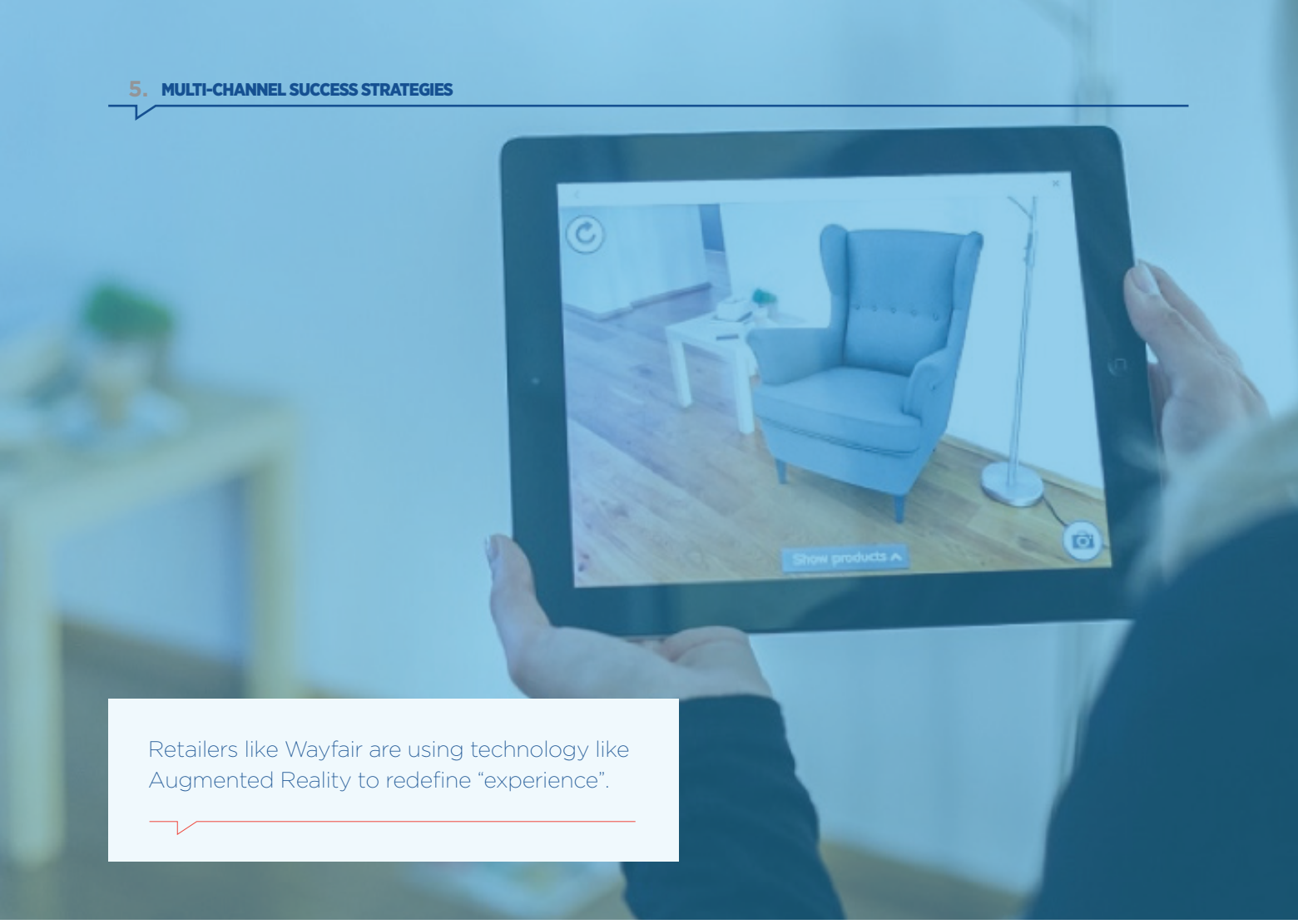

Retailers like Wayfair are using technology like Augmented Reality to redefine "experience".

d. Helping Consumers "Channel Surf"

Some consumers are channel surfers. They like to shop through both online and off-line channels. This represents an opportunity and a challenge for retailers.

It's an opportunity to leverage the in-store environment. Nearly a quarter of online shoppers in department and specialty stores said they wanted a physical store nearby. In fact, not having a physical store nearby was the number one problem they cited with online shopping. Consumers want it all: online shopping and a store across the street.

Retailers with multiple channels must ensure that prices and promotions are clear and transparent—because few things frustrate customers more than discovering different prices online versus in-store. Retailers who want to engage in channel-specific promotions must be doubly clear about the exclusive nature of sales or risk upsetting channel surfing shoppers.

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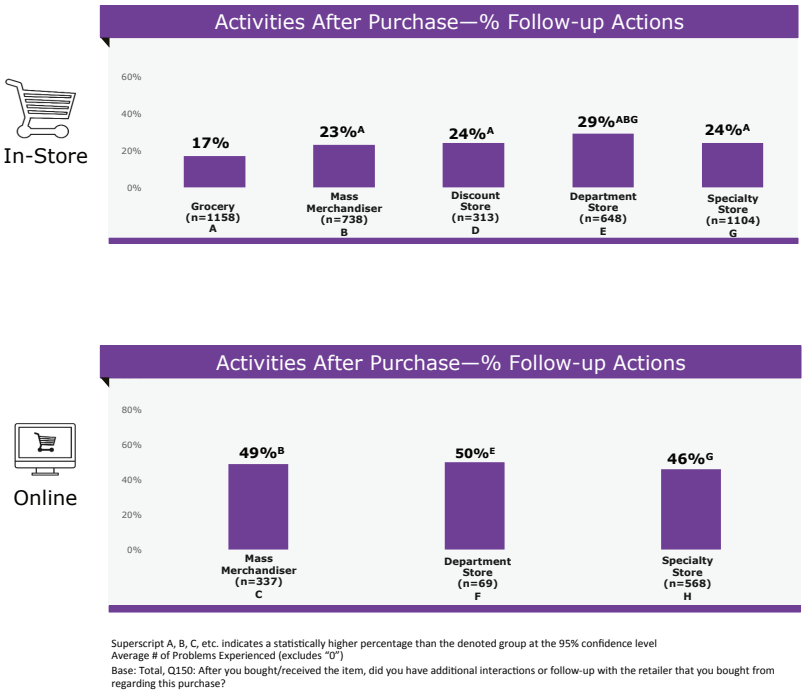
e. The Expanded Experience: It Does Not End with the Sale

Consumers share experiences on social media and retailers must continue listening and responding to the posted feedback. Currently, post-purchase feedback is prevalent through online channels (roughly half of online consumers engage in some sort of post-purchase feedback, compared to roughly a quarter of bricks-and-mortar customers).

Post purchase follow-up is more prevalent online than in-store.

- **Almost twice as many consumers engage in some type of follow-up activity after making a purchase online than with the same retailer in-store**



(Source: WisePlum, 2017)

Engaging with consumers quickly after they make a purchase, or even as they are finalizing their purchase, and addressing comments (the good and the bad), will continue to be the retailer's most effective way to building relationships with consumers and to communicate the value associated with the specific retail brand.

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CONCLUSION

Whether speaking about demographics, channels, or verticals, the retail market in Canada is diverse and in constant flux. Retailers, media, and commentators make a mistake when they assume that a prevalent trend today will be a dominant factor tomorrow. Today, physical retail is overwhelmingly preferred but bricks-and-mortar retailers continue to struggle to provide quick, convenient service, and they are particularly susceptible to losing customers to online vendors and seeing those customers become loyal to online channels. Online retailing is growing but also faces significant challenges in reducing friction on the path to purchase.

Retailers, regardless of channel, must understand consumers will no longer accept retail experiences that are inconvenient, slow, offer little product knowledge, or come with poor service. Consumer no longer care whether a product is sold online, or in-store; they want the best product, with the best service, in the most convenient way possible regardless of channel.

This survey shows that retailers cannot afford to have anything that inhibits a purchase, slows down transactions, or sullies service levels either online or in-store. Retailers must look for every point of friction their retail environment imposes as consumers travel through their path to purchase. Once these weaknesses are identified, retailers must acknowledge and immediately address them throughout the organization in order to offer a completely frictionless retail experience.

> "My view is that we should worry, everyone should worry today because consumers are shifting quickly, and loyalties are moving fast. I think traditional bricks-and-mortar retailers must start thinking about a seamless customer experience, irrespective of channel, try to create more of an omni-channel approach. Connect the digital world into the store and enhance the store experience to reflect the digital influence".
>
> - Tanbir Grover, VP, e-Commerce & Omnichannel, Lowes RONA

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ABOUT THE STUDY

This study is a collaboration between research tool WisePlum, Microsoft Canada Inc, Retail Council of Canada (RCC) and RCC's Marketing Advisory Committee. Conducted between August 15 and 31, 2017, the researchers surveyed 5,009 Canadian retail shoppers in every major retail vertical. To ensure the study was representative of the Canadian population, the researchers established regional and gender quotas. Gen Z (aged 18-21) was oversampled to allow a robust sample size for analysis. Data were weighted on age to allow for proper presentation in reporting.

WisePlum

WisePlum®, a collaboration between LoyaltyOne and Verde Group, is a product created to answer one critical question: where should a retailer invest in the customer experience to increase top line revenue growth and market share. Through a software-as-a-service delivery model, WisePlum® provides retailers with customer experience insights that are financially quantified, benchmarked against the competition and delivered weekly for continuous market monitoring. LoyaltyOne is a global leader in the design and implementation of coalition loyalty programs, customer analytics, and loyalty services.
Verde Group is a preeminent provider of customer experience measurement and management strategy solutions.

www.WisePlum.com

Microsoft Canada Inc.

In retail, Microsoft's mission and outcomes enable you to deliver personal, seamless and differentiated experiences by empowering people, enabling the best of online and offline, and capturing insights to drive growth. We provide end-to-end solution design, and delivery services for common retail industry scenarios including Advanced Planning; Employee Productivity & Collaboration; Inventory Optimization; Modern Point of Sale & Service and Retail Execution; all of which help to create a more engaging customer experience.

https://aka.ms/RCCTransformingRetail

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Retail Council of Canada

Retail is Canada's largest employer with 2.1 million Canadians working in our industry, which annually generates over $73 billion in wages and employee benefits. Core retail sales (excluding vehicles and gasoline) were $353 billion in 2016. Retail Council of Canada (RCC) members represent more than two thirds of core retail sales in the country. RCC is a not-for-profit industry-funded association and represents small, medium and large retail business in every community across the country. As the Voice of Retail™ in Canada, we proudly represent more than 45,000 storefronts in all retail formats, including department, grocery, specialty, discount, independent retailers and online merchants.

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