

Holiday shoppers are in the driver's seat now—here's what they're looking for

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Armed with mobile devices as their “anywhere” assistants, today's holiday shoppers are more informed than ever. The result? Promotion-driven shopping events like Black Friday are no longer anchored to a single day. Consumers are now in the driver's seat—researching to find the best deals of the season before, during, and after Black Friday, and hatching a game plan to determine what, where, and when to buy.

Researching around the clock

With retailers [sharing Black Friday deals earlier and earlier](#), shoppers have a bigger opportunity to make more informed decisions about their purchases. We're seeing these curious consumers lean into holiday shopping research with increasing frequency. Shoppers are trading time spent standing in line for time spent researching everything from door-busting deals to details around specific products.

For example, mobile searches containing “Black Friday” increased by 80% over the past two years (e.g., “when is black friday,” “lowes black friday,” “best black friday deals”).¹

think with 

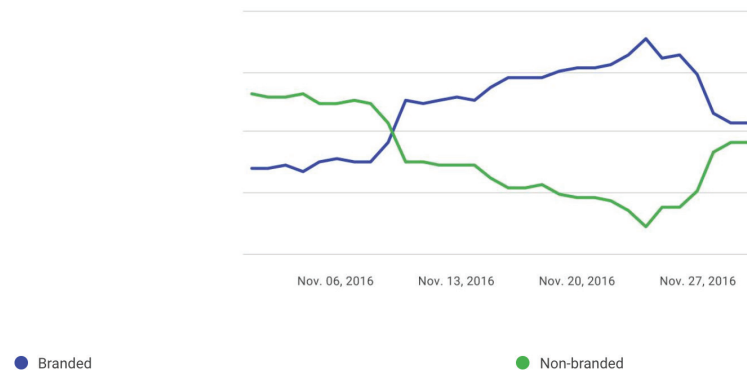


Mobile searches containing **“Black Friday”** increased by **80%** over the past two years.

Source: Google Data, U.S., Oct.-Dec. 2014 and 2016

Beyond searching to find more information for Black Friday, people are also researching brands over the holidays. In early November, we see generic, non-branded searches for Black Friday outpacing branded searches (e.g., "black friday furniture sale" and "black friday makeup deals 2016"). Then, about two and a half weeks before the four-day weekend, there is a switch to searches for Black Friday becoming mostly branded (e.g., "ashley furniture black friday" and "sephora black friday 2016") as shoppers narrow down their options and begin laser-focusing their research on the specific items they want to buy.²

Branded searches vs. non-branded searches



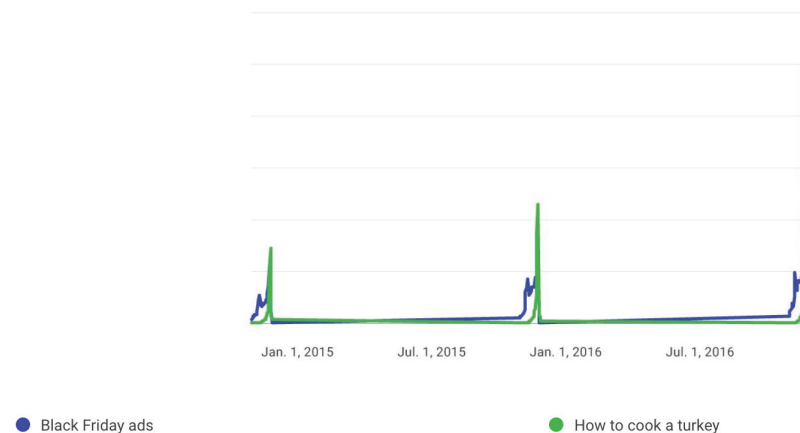
Source: Google Data, U.S., November 2016. Search examples are among the top 1000 searches.

And what items are they searching for? We've got a good idea. We looked at trending products going into Black Friday and here's what we saw:³

- Classic apparel brands like [Vans](#), [Canada Goose](#), and [Nike Air Jordan Retro 11](#) are still top of mind.
- Celebrity-backed products are becoming must-haves, with Kevin Durant's [Nike KD 10](#), [Pharrell x adidas](#), and Rihanna's [Fenty Beauty](#) topping the list.
- Gifts for gamers, including [Razer Phones](#), [Nintendo Switch](#), and [Call of Duty WW2](#), are seeing a big spike in search interest as well.

Here's more food for thought: Aside from doing early holiday research, today's shoppers are using mobile to research more on Thanksgiving. In 2016, mobile searches for "black friday ad(s)" peaked on Thanksgiving.⁴ Overall, there were 2.5X as many searches for "black friday ads" as there were for "how to cook a turkey" on that day.⁵

Searches for 'Black Friday ads' vs. searches for 'how to cook a turkey'



Source: Google Data, U.S., Nov. 24, 2016

Creating a game plan

Once shoppers have done their research, they're shifting their focus to the best way to go about crossing off gifts on their lists—whether that's in store or online. Mobile searches for “where to buy” (e.g., “where to buy ugly christmas sweaters” and “where to buy gift boxes”) grew more than 85% over the past two years.⁶

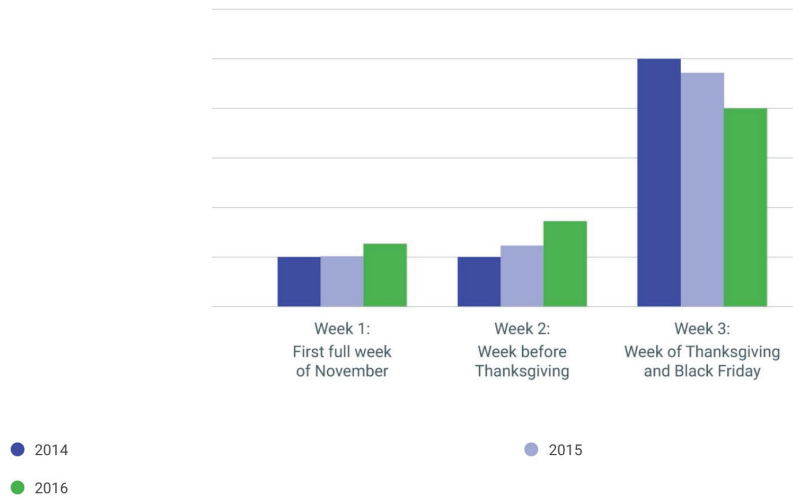
For Thanksgiving weekend specifically, with large sales happening within a few days of each other, people want to determine the best time to shop. Among the top Black Friday searches, we're seeing searches for “cyber monday vs black friday,” “which is better black friday or cyber monday,” and “is cyber monday as good as black friday.”⁷

Purchasing with purpose

Having done the research and determined what they're getting and where they're buying it, today's empowered consumers are deciding exactly when and how they want to purchase. These factors help explain why Black Friday is becoming less important as an in-store shopping holiday.

As proof—and in line with industry reports—we see that foot traffic on Black Friday is declining. In fact, Black Fri-"day" is becoming a weeklong event. During the three-week period leading up to Black Friday, retailers are experiencing a larger percentage of store traffic the week before Black Friday.⁸

Changes in the concentration of store traffic during the lead up to Black Friday



Source: Google Data, Aggregated, anonymized store traffic from a sample of U.S. users that have turned on Location History, Nov. 2014, 2015 and 2016, U.S. Compared the percentage of store traffic to clothing stores, department stores, electronics stores, toy stores, and shopping malls during the three-week period leading up to Black Friday weekend: Nov. 10-30, 2014, Nov. 9-29, 2015, and Nov. 7-27, 2016.

But with all the scrutiny around store traffic on Black Friday, it's worth noting that online conversions stay steady throughout November, spiking on both Black Friday and Cyber Monday. In fact, we see that the mobile transaction rate jumps 40% during the Thanksgiving weekend when compared with the rest of the year.⁹ It's a sign that mobile researchers are likely to become mobile buyers over the four-day holiday break.

With all that said, it's easy to see why there's no longer a huge rush to the store to snap up those doorbuster bargains. Rather than pin their hopes on bagging the perfect sale on Black Friday, customers are finding the best shopping strategy that suits them. Marketers would be wise to meet shoppers in these varying moments during search, online, and in stores throughout the season. Doing so could mean happier holidays indeed.

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Sources

- 1 Google Data, U.S., Oct.-Dec. 2014 and 2016
- 2 Google Data, U.S., November 2016. Search examples are among the top 1000 searches.
- 3 Google Shopping Insights, U.S., all devices, Nov. 1, 2016-Nov. 13, 2017
- 4 Google Data, U.S., Oct. 2014-Dec. 2016
- 5 Google Data, U.S., Nov. 24, 2016
- 6 Google Data, U.S., Jan.-June 2015 vs. Jan.-June 2017.
- 7 Google Data, U.S., Oct.-Dec. 2016. Search examples are among the top 10,000 searches.
- 8 Google Data, Aggregated, anonymized store traffic from a sample of U.S. users that have turned on Location History, Nov. 2014, 2015 and 2016, U.S. Compared the percentage of store traffic to clothing stores, department stores, electronics stores, toy stores and shopping malls during the three-week period leading up to Black Friday weekend: Nov. 10-30, 2014, Nov. 9-29, 2015, and Nov. 7-27, 2016.
- 9 Google Analytics, U.S., Jan.-Dec. 2016. Based on data from Google Analytics accounts that have authorized Google to share website data in an aggregate way.