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Digital Lessons from Holiday 2009

Google/OTX
U.S., 2010

5 Learnings for the New Year

1. Online Is Growing
2. Google Drives More Purchasers, More Efficiently
3. Consumers Start Early & End Late
4. Shopping Focused On Key Time Periods
5. Research & Purchase Process Is Multi-Channel

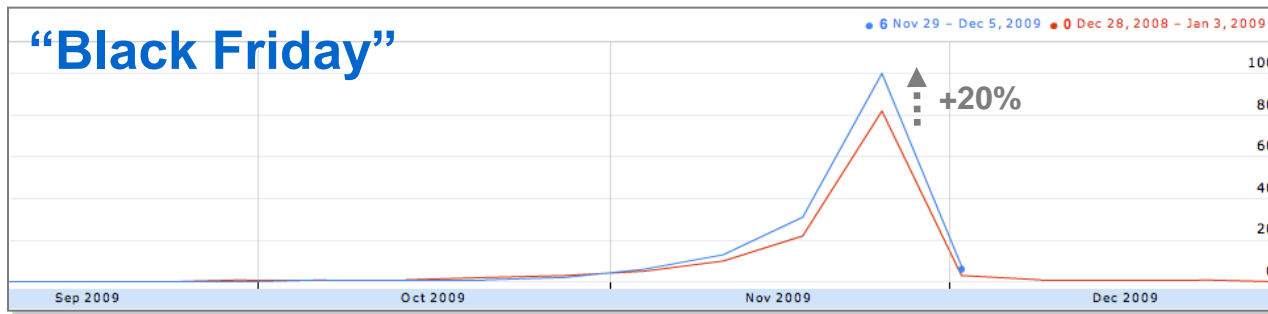
1. Online Purchasing is Up

\$29 billion in online sales this holiday season, up 4% YoY. Growth on key shopping days and late in the season.

Holiday 2009 Key E-Commerce Days (\$ Millions), % Growth (YoY)						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
Nov 23	24	25	26 Thanksgiving \$318, +10%	27 Black Friday \$595, +11%	28 Thanksgiving Weekend \$805, +5%	29
30 Cyber Monday \$887, +5%	Dec 1 \$886	2 \$797	3 \$803	4	5	6
7	8 \$828	9	10 \$852	11	12	13
14 Green Monday \$854, -1%	15 Green Tuesday \$913, +21	16 \$874	17 Free Shipping Day \$809, +6%	18	19 Weekend Before Christmas \$767, +13%	20
21	22	23	24	25	26	27

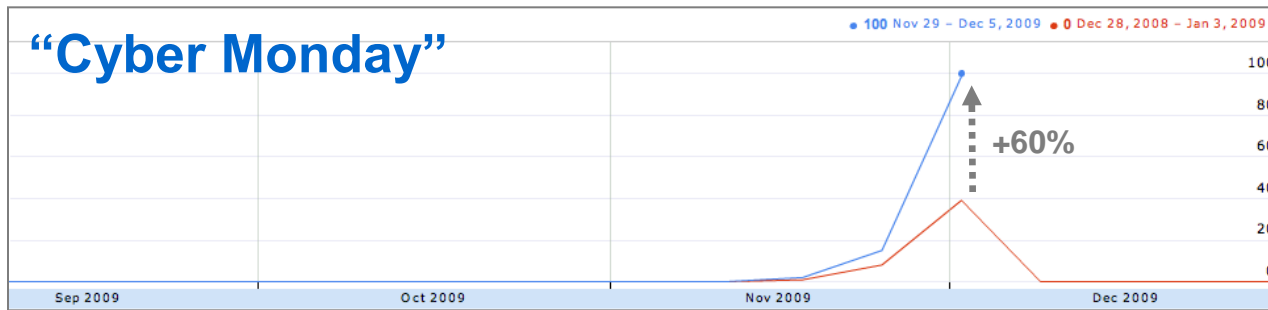
1. Search Volume is Up

Searches on key dates increased substantially in 2009



Did you know...

Searches for 'black friday' increased **20%** compared to 2008.



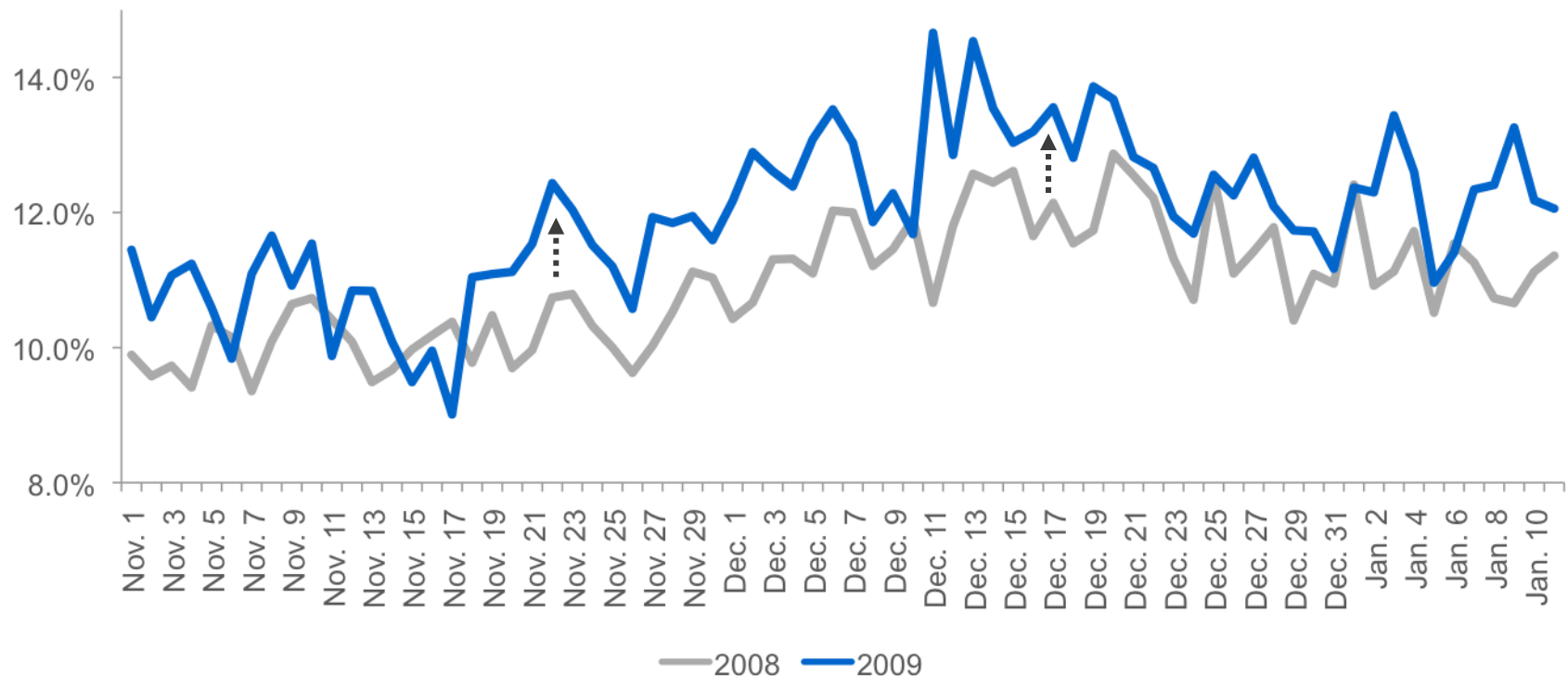
Did you know...

Searches for 'cyber monday' increased **60%** compared to 2008,

2. Google Delivers More Purchasers

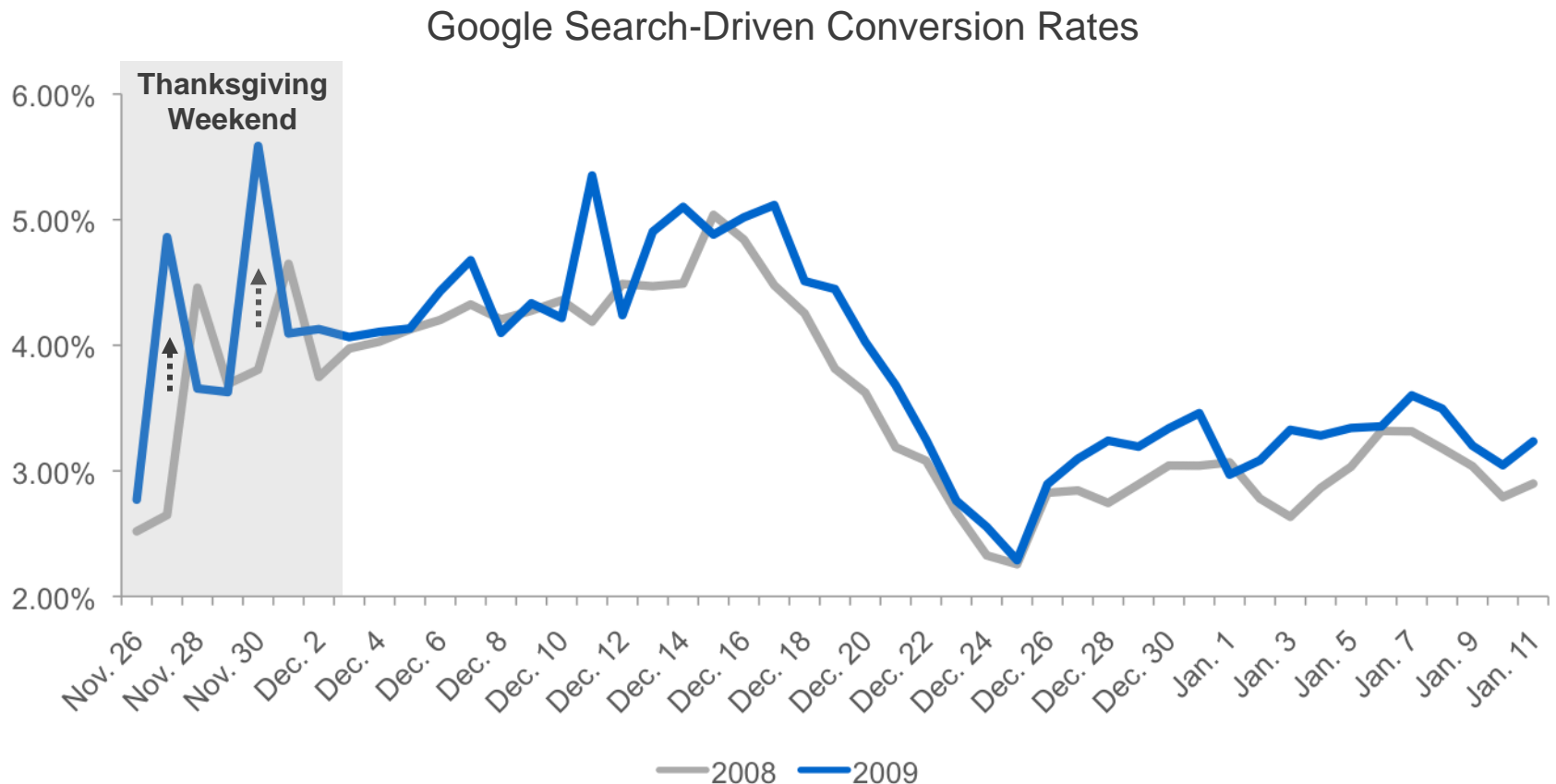
Google Search drove an increased share of purchases to Retail websites, up **9%** year-over-year.

Share of all Retail Conversions from Google Search



2. Google Conversion Rates Increase

Google search-driven conversion rates increased **8%** year-over-year, especially on Black Friday and Cyber Monday.



3. Consumers Start Early & End Late...

As of August, 30, 2009...

44%

Had already started holiday shopping.

36%

Had already made holiday purchases.



As of December 20, 2009...

14%

Had yet to start holiday shopping.

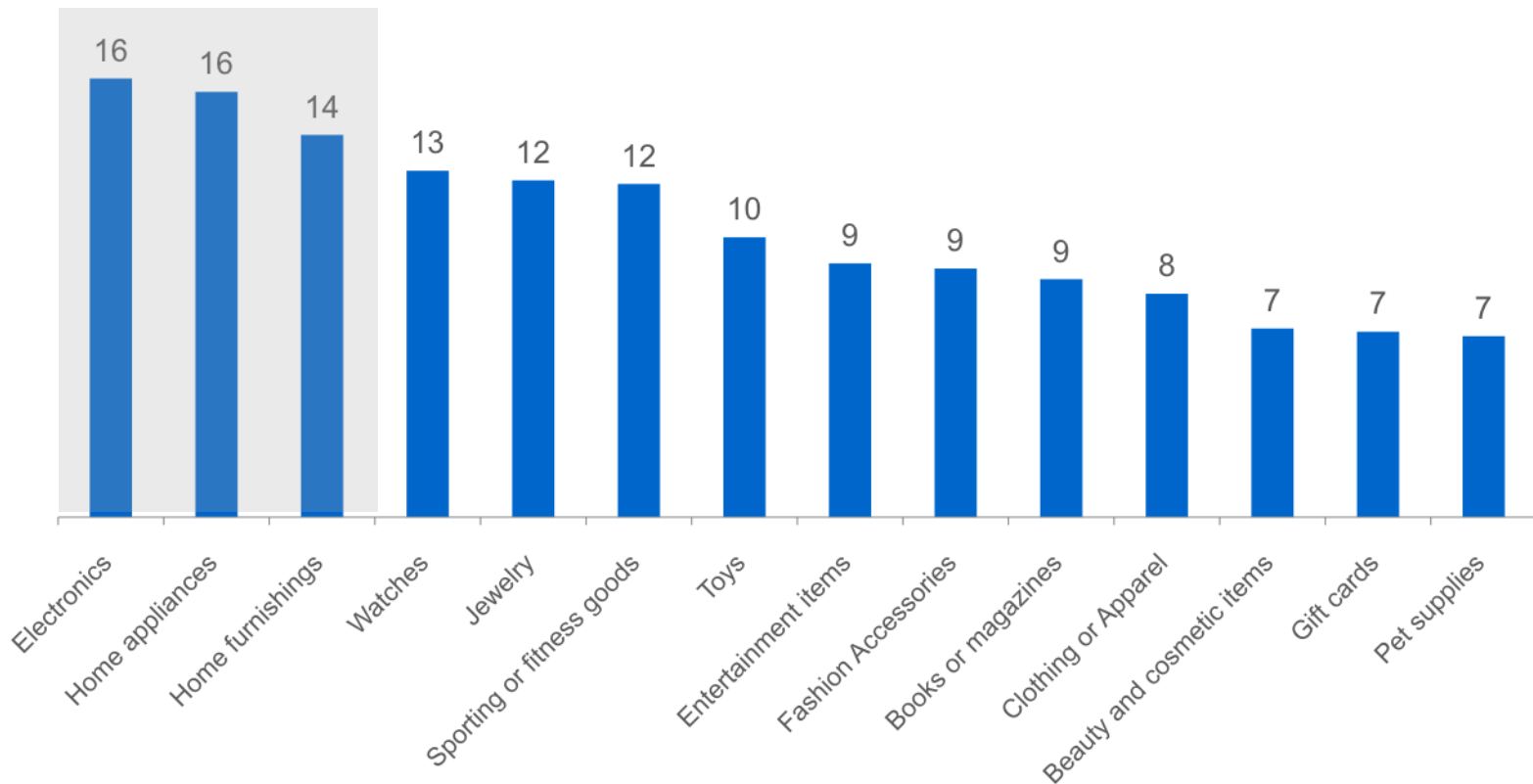
17%

Had yet to make a holiday purchase.

3. ...And Research Far In Advance Of Purchase

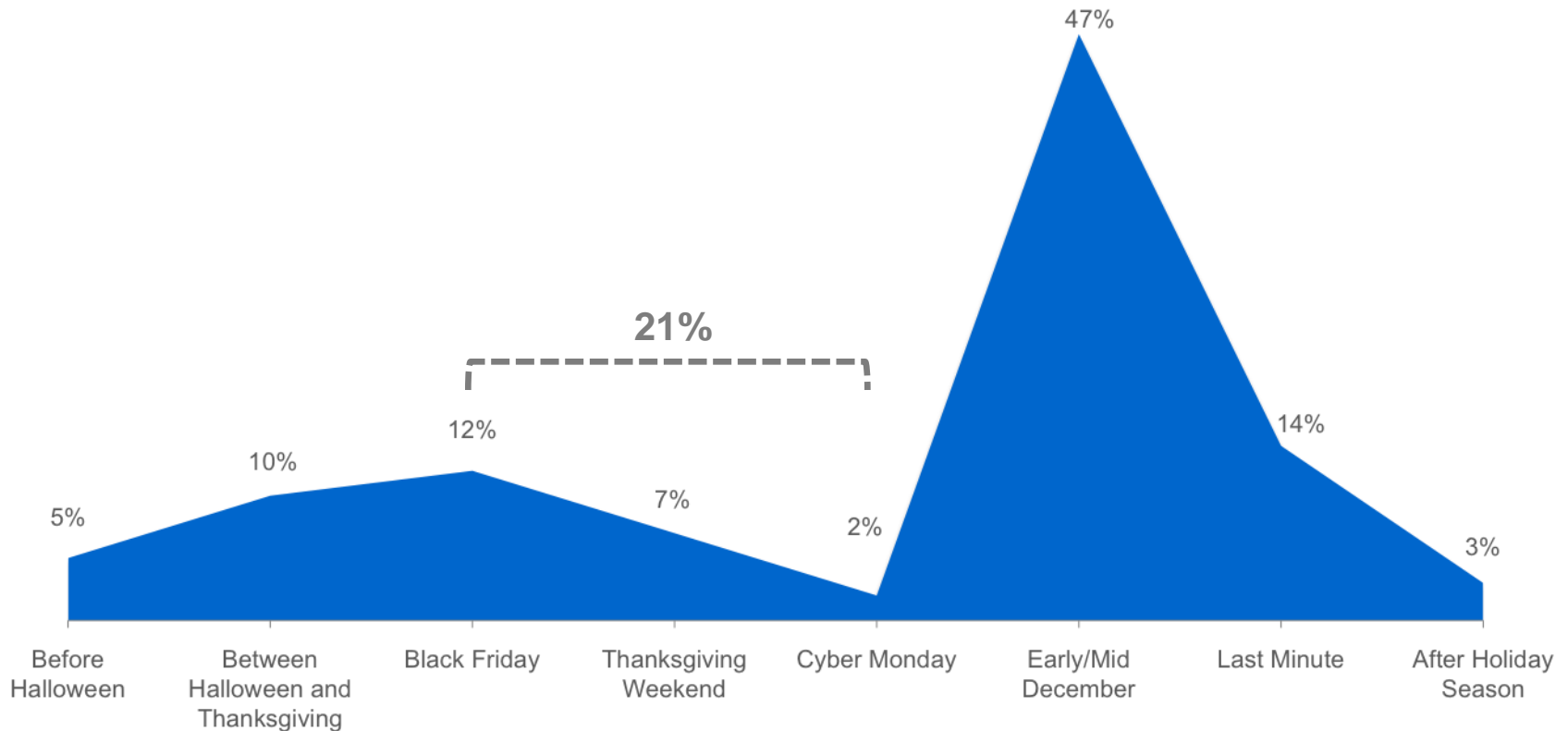
Prior to purchase, consumers begin researching multiple days in advance. Especially in the electronics and home categories.

Average # of Days of Research Prior to Purchase



4. Consumers Focus On Key Shopping Periods

21% did the majority of their purchasing over Thanksgiving Weekend, while 14% waited until the last minute.



4. Consumers Focus On Key Shopping Periods

64% shopped post-holiday to make additional purchases, take advantage of sales, and shop for upcoming occasions.

Reasons for Shopping After the Holidays



5. Research & Purchase Process Is Multi-Channel

42% of consumers researched online and purchased the products online

34% of consumers researched online and then went to the store to purchase the products

21% of consumers researched online, went to the store to check out the products, and then went back online to purchase the products

12% of consumers visited a store first then purchased online

7% of consumers purchased the product in-store and then researched my purchase online afterwards



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