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Post-Holiday Learnings for 2011

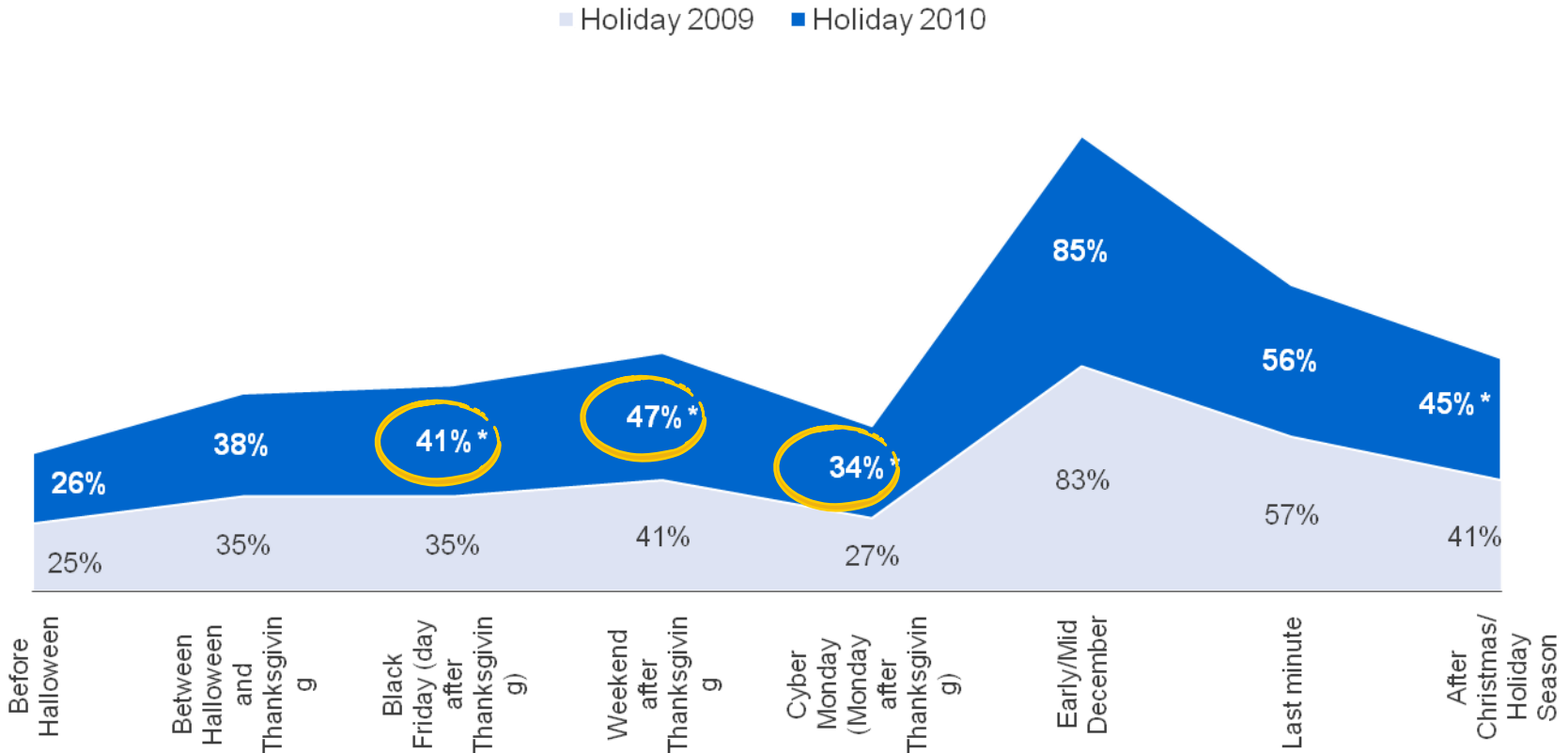
Google/OTX

U.S., February 2011

Key Takeaways from Holiday 2010

1. Consumers shopped promotional periods more than ever
 - Post-Thanksgiving: Black Friday through Cyber Monday
 - Free Shipping Day (Dec 17th)
 - Post-Holiday
2. Consumers researched extensively & seamlessly across channels. Online – search in particular – was a top source of information
3. Mobile entered the mainstream as holiday shopping assistant

Post-Thanksgiving: More Consumers Shopped This Year



Base: Total Respondents (n=1850)

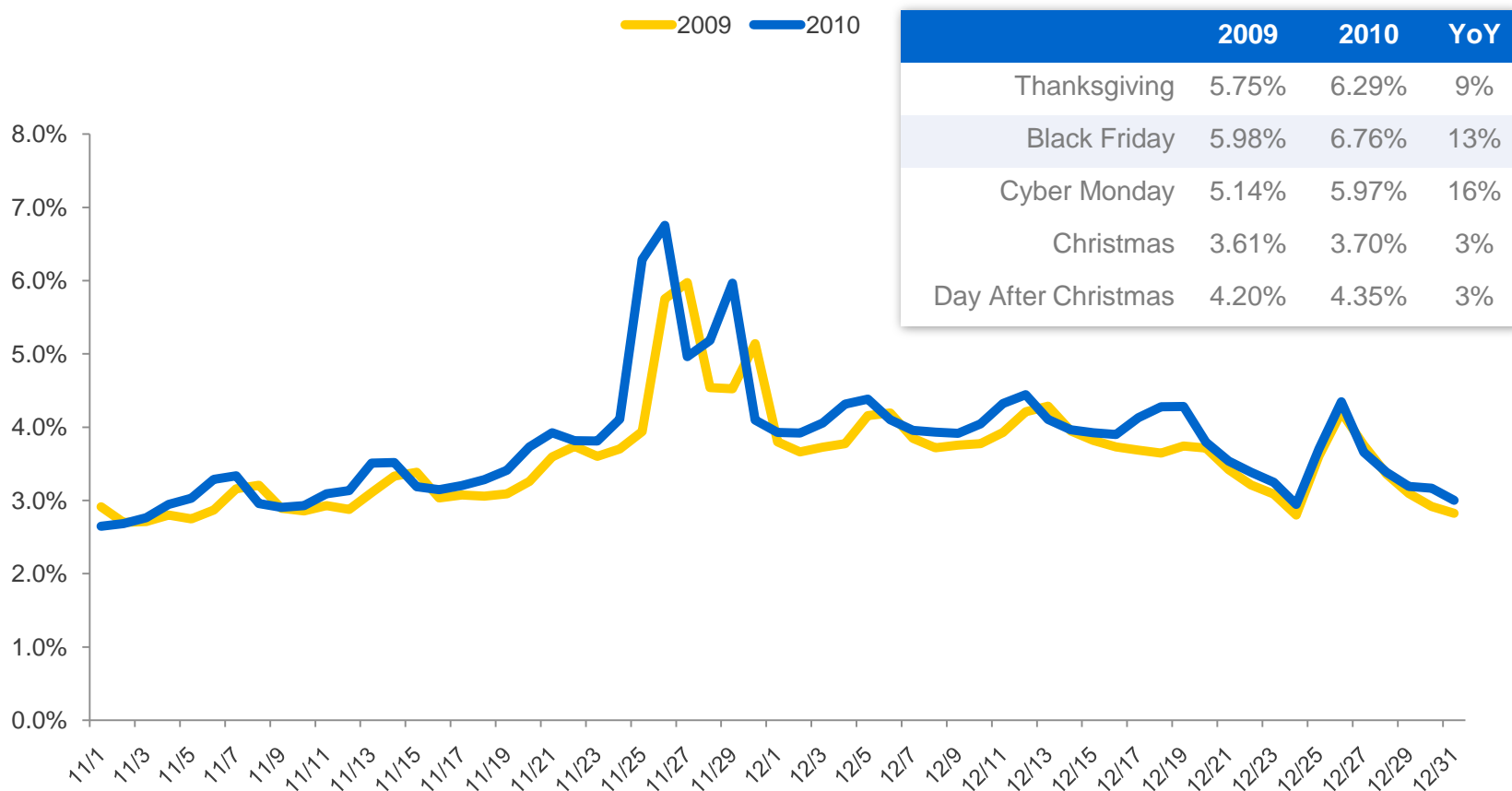
(Q3) When did you do the majority of your holiday purchasing? (Select one)

(Q4) Did you do any additional Holiday shopping during any of the following times? (Select one for each)

Source: Google & Ipsos OTX Post Holiday Shopping Intentions Study, January 2011

Post-Thanksgiving: Most Online Visits on Black Friday as Consumers Planned Shopping Strategies

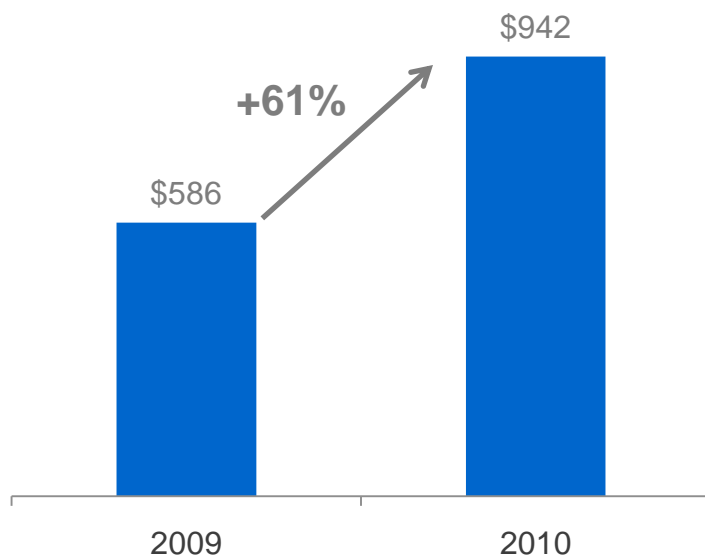
Daily Market Share of Visits to Retail 500 Sites



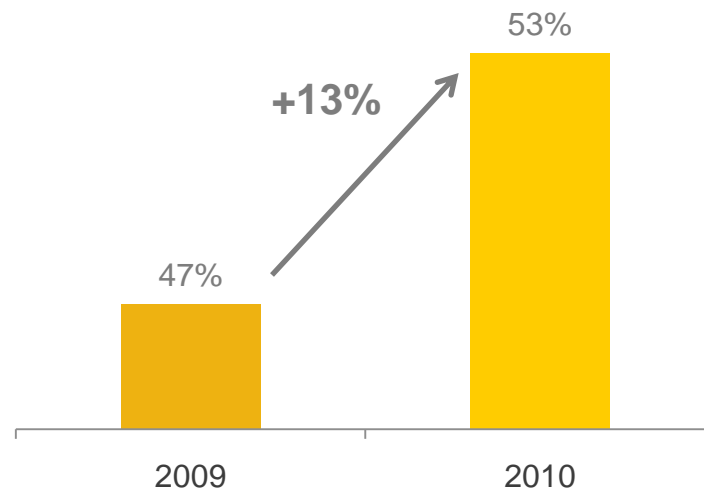
Free Shipping Day: Biggest Increase in Online Sales

Free Shipping Day saw the biggest Y/Y increase in online sales, with sales climbing **61% Y/Y**, as more people took advantage of free shipping promotions

Online Sales on Free Shipping Day (Dec 17)

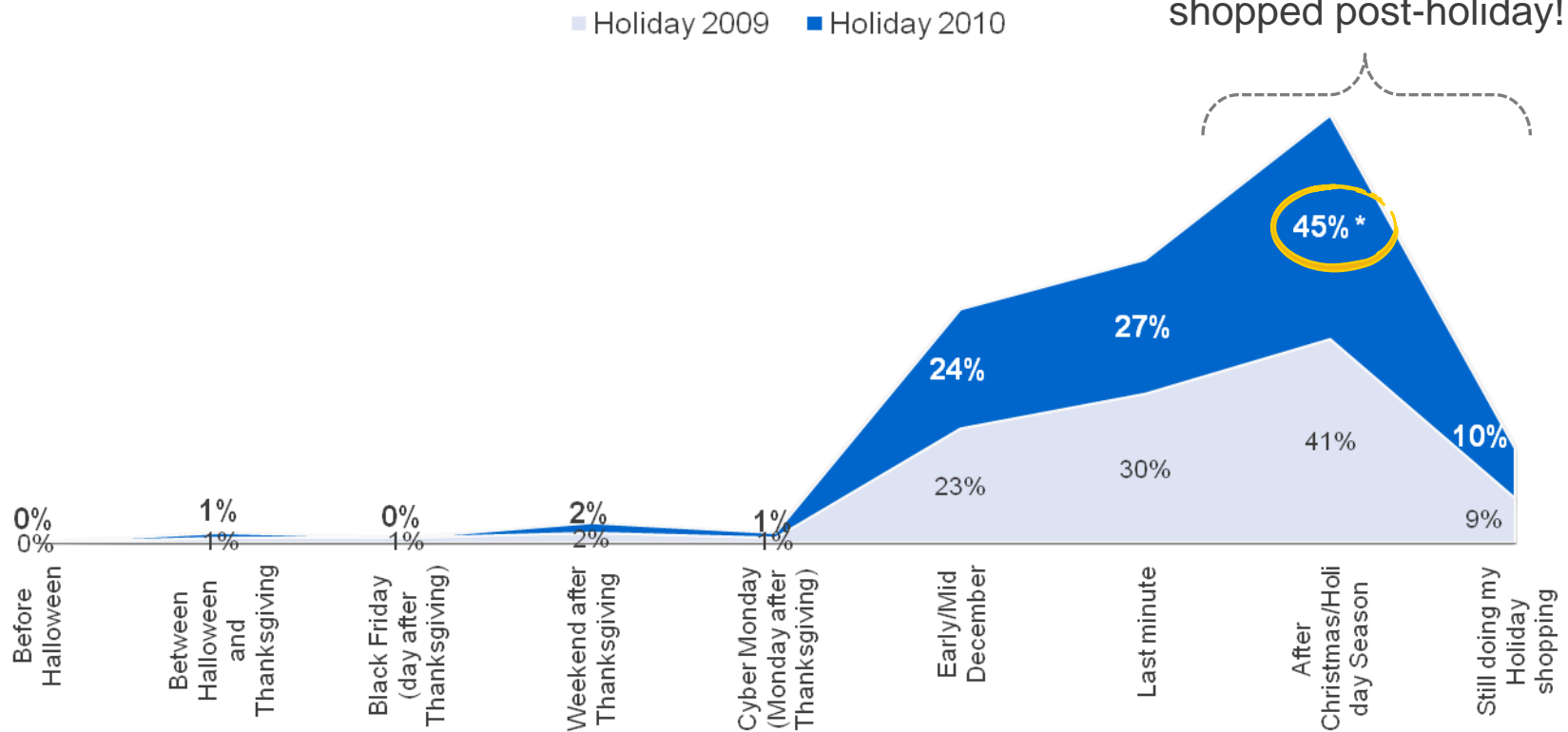


% Took Advantage of Free Shipping Promotions during Holiday 2010 Season



Post-Holiday: More than Half of Consumers Shopped

55%
of consumers
shopped post-holiday!



Base: Total Respondents (n=1850)
(Q6) You mentioned the last time you shopped during this Holiday Season was [INSERT DUMQ6]. Did you finish your shopping at this time? Select one.

Source: Google & Ipsos OTX Post Holiday Shopping Intentions Study, January 2011

Post-Holiday: Deals & Sales Helped Motivate Shopping

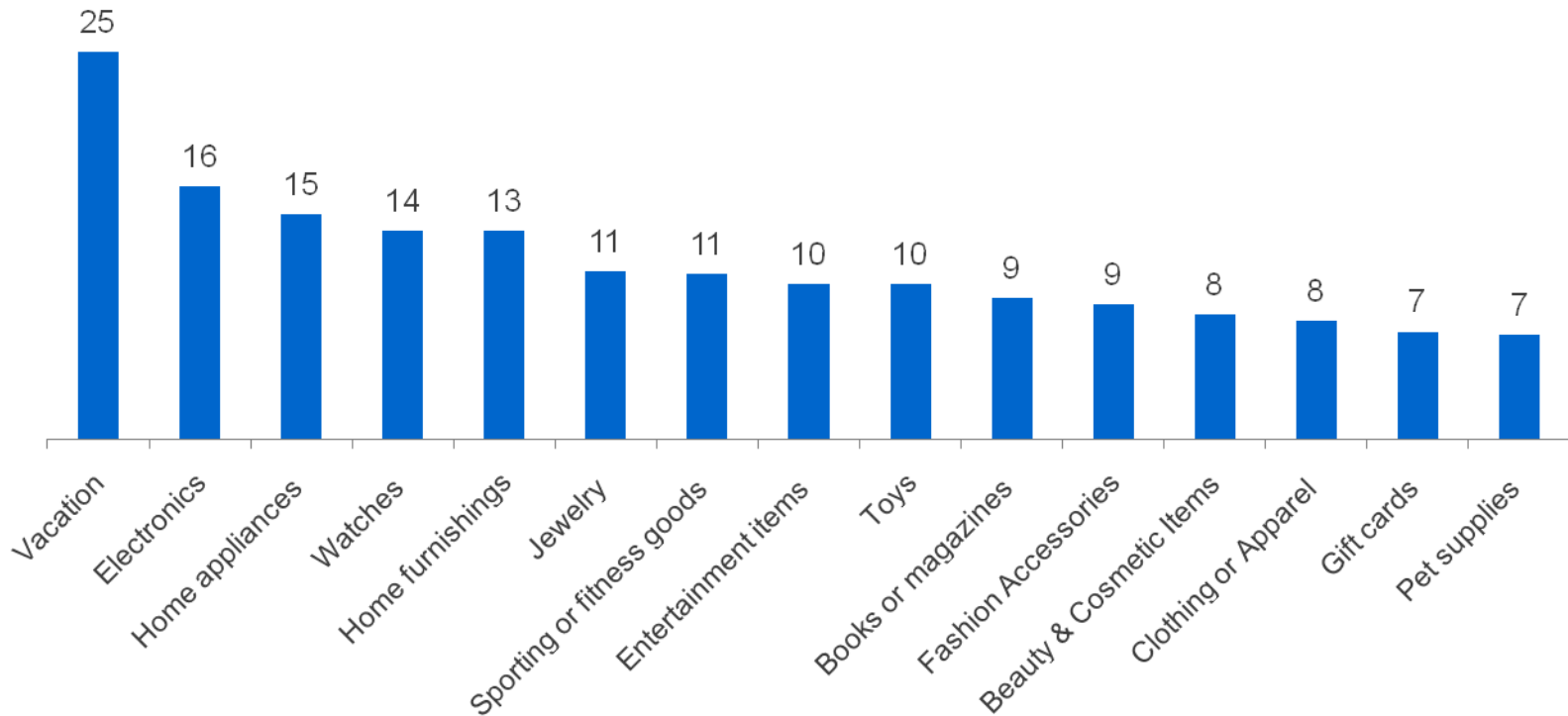


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Consumers Researched Far in Advance of Purchase

Average # of Days of Research Prior to Purchase



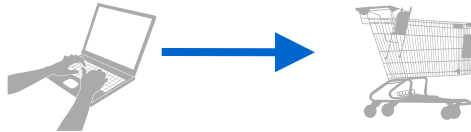
Research Was Extensive & Occurred Seamlessly Across Channels



51% visited the store,
purchased at the store



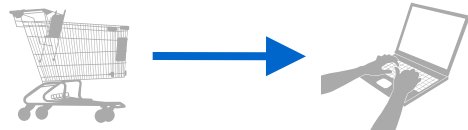
45% researched online,
then purchased online



35% researched online, then
went to store to purchase



21% researched online, checked out
products in the store, then went
back online to purchase



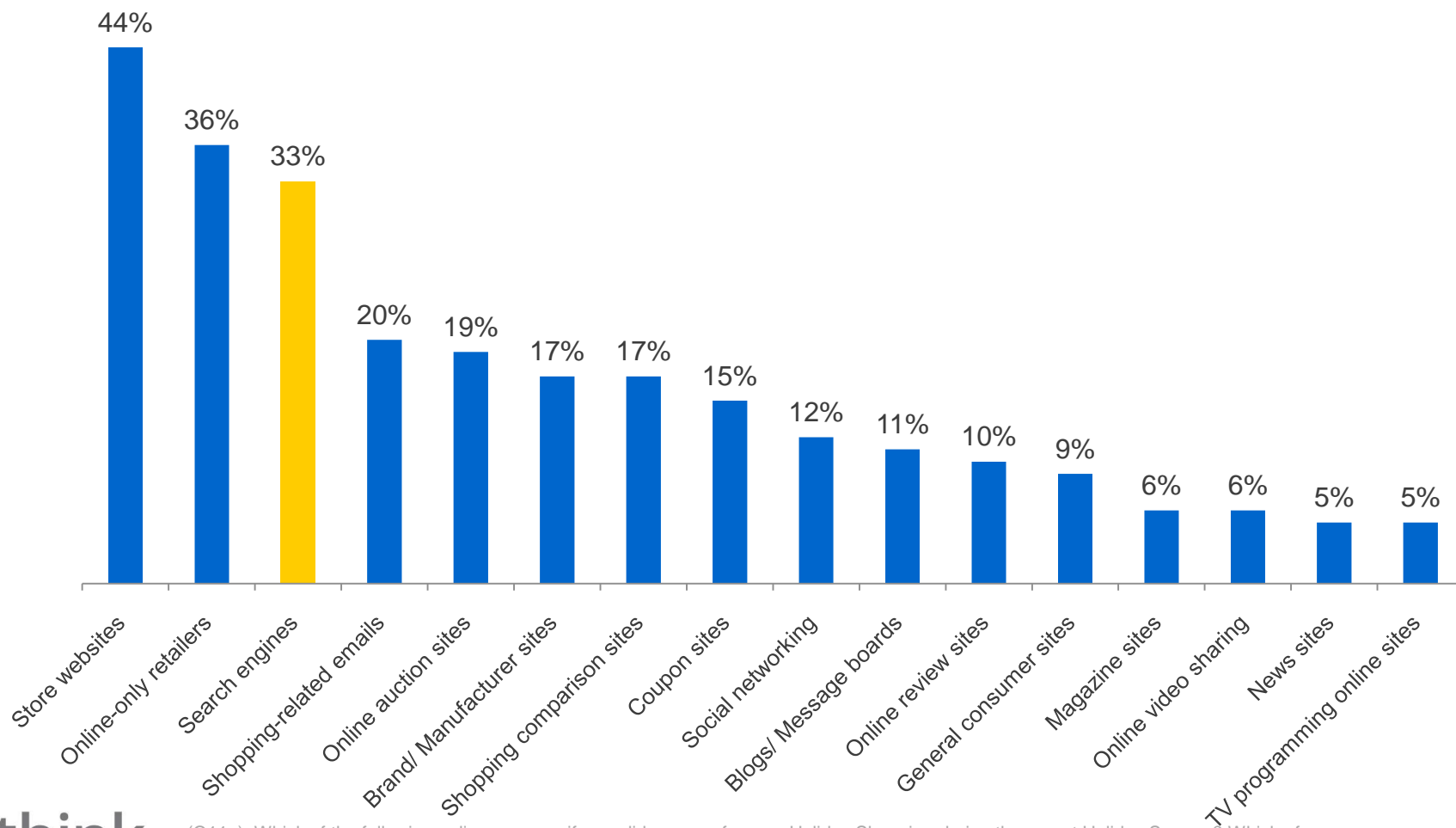
14% visited the store first, then
purchased products online

Online Research Was Critical Part of the Process

67%

of consumers researched
online prior to purchase
during the holiday season

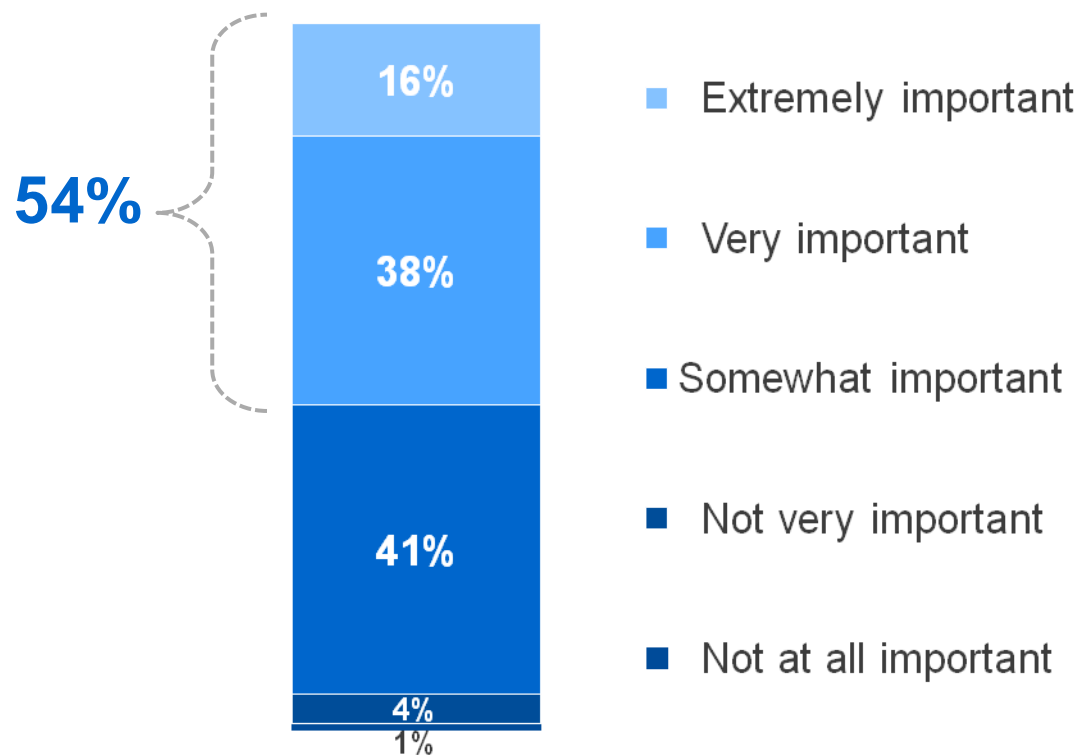
Search Was a Top Source of Information, Following Retailer Sites



(Q11a): Which of the following online sources, if any, did you use for your Holiday Shopping during the recent Holiday Season? Which of the following online sources, if any, did you use for your Holiday shopping during the recent Holiday Season? Again, please think of any sources you may have used for gift ideas, reviews, price comparisons, etc. Select all that apply.

Source: Google & Ipsos OTX Post Holiday Shopping Intentions Study, January 2011

54% Say Search Is a Really Important Information Source for Making Holiday Purchases



2010

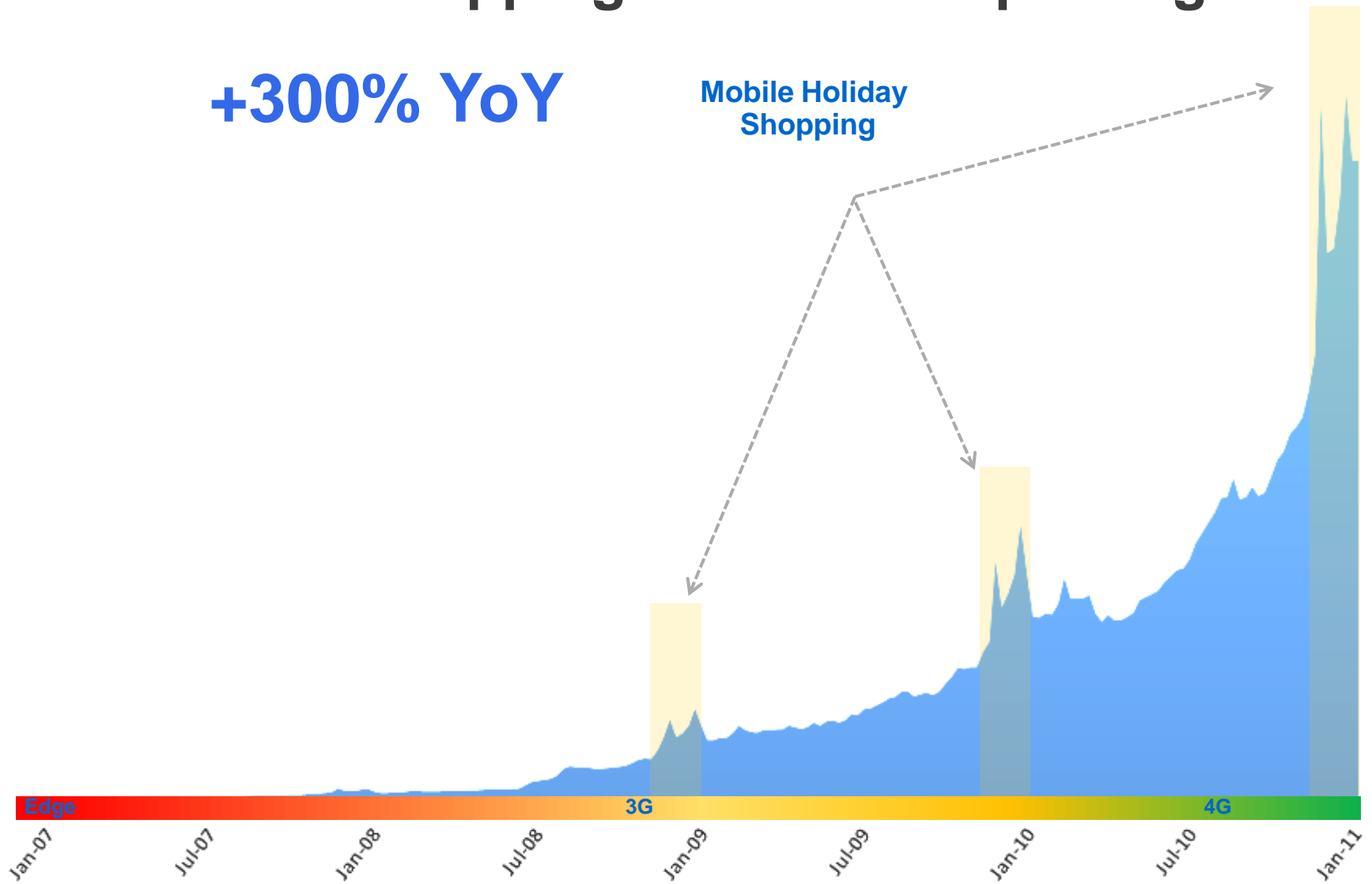
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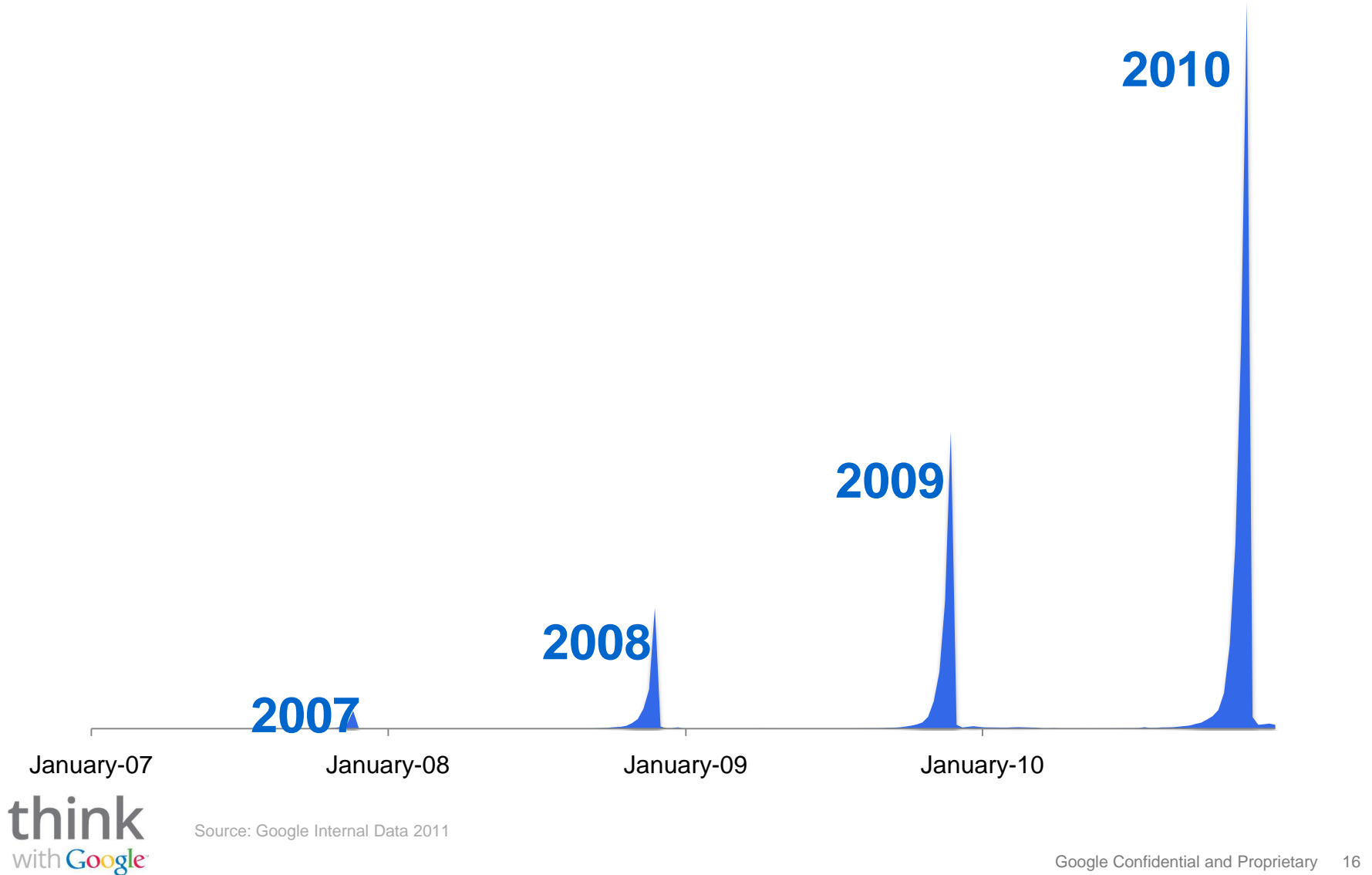
U.S. Mobile Shopping Searches Exploding

+300% YoY

Mobile Holiday Shopping



Mobile's Black Friday: 200% Growth YoY



59%

of smartphone users
used their phones for
holiday shopping this Q4

Mobile Helped Shoppers Become Better Informed: Price Comparisons, Coupons, Reviews, Local Availability



Base: Use Smartphone regularly 2011 n= 630. (Q20) In which of the following ways, if any, did you use your smartphone to do your shopping this Holiday Season? (Select all that apply)
Source: Google & Ipsos OTX Post Holiday Shopping Intentions Study, January 2011

Of holiday smartphone
shoppers/researchers,

80%

used their phones to
shop/research while
in a store

Mobile Was Incorporated Across Channels. Mobile Both Drove and Diverted Online & Store Purchases



48%

researched on smartphone,
went to store to purchase



45%

researched on smartphone, then
purchased online on computer



30%

researched on smartphone,
purchased on smartphone



18%

researched on smartphone, visited
store to check out products, then
purchased online on computer



14%

researched on smartphone,
visited store to check out products,
then purchased on smartphone



12%

Visited the store first, then
purchased on smartphone

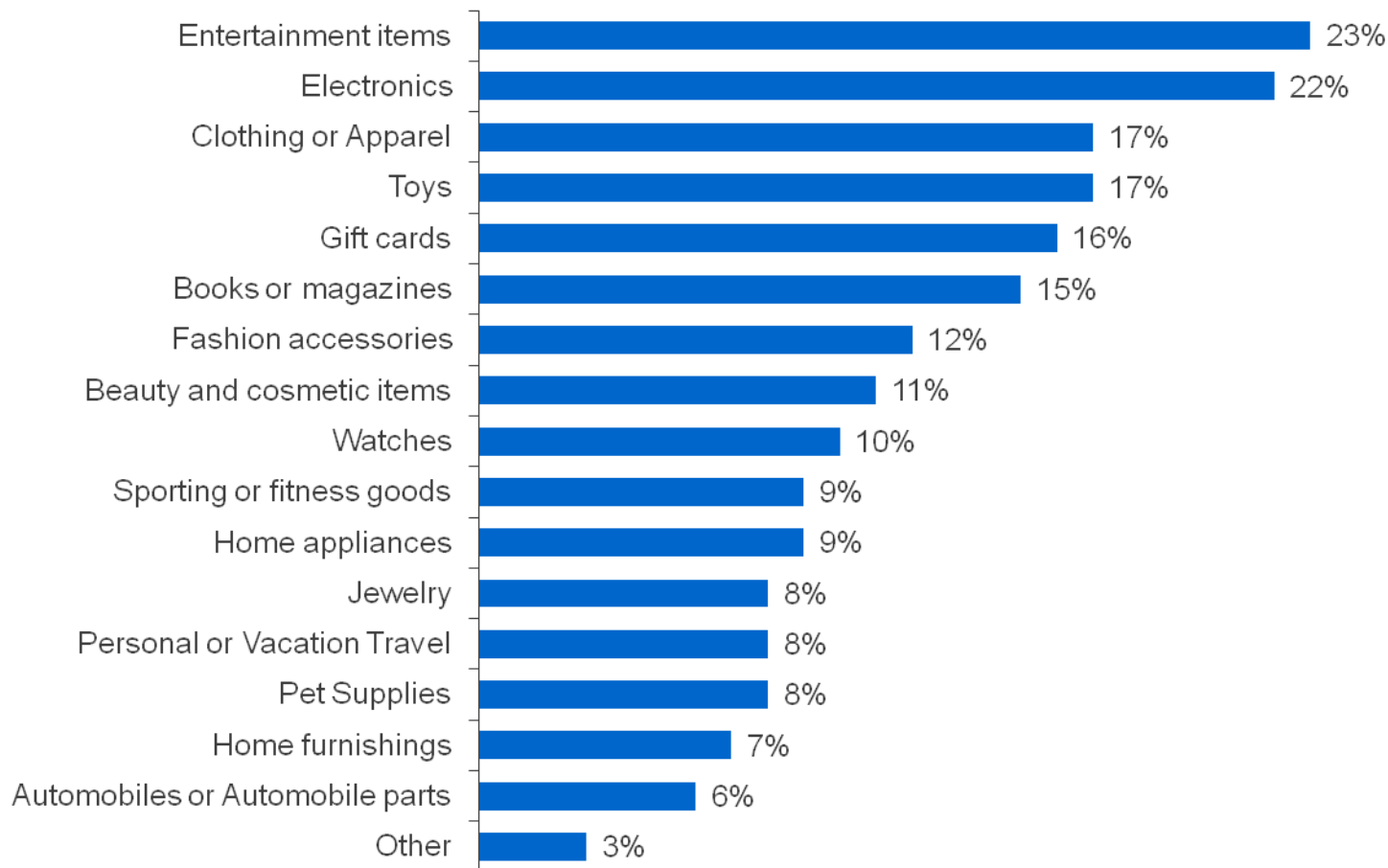
Mobile Was Also a Purchase Channel in Its Own Right

Of holiday smartphone
shoppers/researchers,

41%

made a purchase on
their smartphone

What Products Did Smartphone Holiday Shoppers Purchase on Their Smartphones?



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