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Holiday 2010: Consumer Intentions

Google/OTX
U.S., September 2010



What we're seeing this holiday season

1 Early shopper gets the gifts

2 The connected consumer

3 New, hot products



Early Shopper Gets the Gifts



Holiday starts early. As of October 5. . .

71%

Have started holiday researching/shopping

49%

Have made holiday purchases

77%

Have yet to complete their holiday shopping



Shoppers want to beat the rush

Why have you started your shopping/researching?



Black Friday searches come early. . .



And show impact of Christmas in July



**CHRISTMAS
SAVERS
CLUB**

The smart way to **SAVE**
for the Holidays!

**EARN A
BONUS
3%**

A giraffe wearing a Santa hat and a red and white striped shirt is holding a pink piggy bank. The piggy bank has a dollar sign on it.



SHOP BACK IN BLACK FRIDAY

Toy Deals >
Electronic
50%
Outdoor Deals >
Home Deals >
Women's Deals >

SALE PREVIEW

daily deals
PRESENTS

BACK IN BLACK FRIDAY

Only This Friday. Only Online. Bookmark now and save big soon.

Limited quantities at these prices.



The Christmas Bonus Is Back

1 Set your goal

2 Determine your payment amount and schedule

3 Earn your 3% bonus and shop

Christmas Club



Welcome to Christmas Lane

Christmas Lane is Here

The Best Deals for Christmas
5 Months Early

Explore the town to find out more →

Kmart, Winter Readiness, Sears



Shoppers accustomed to holiday offers

Likely To Take Advantage Of Offers and Promotions

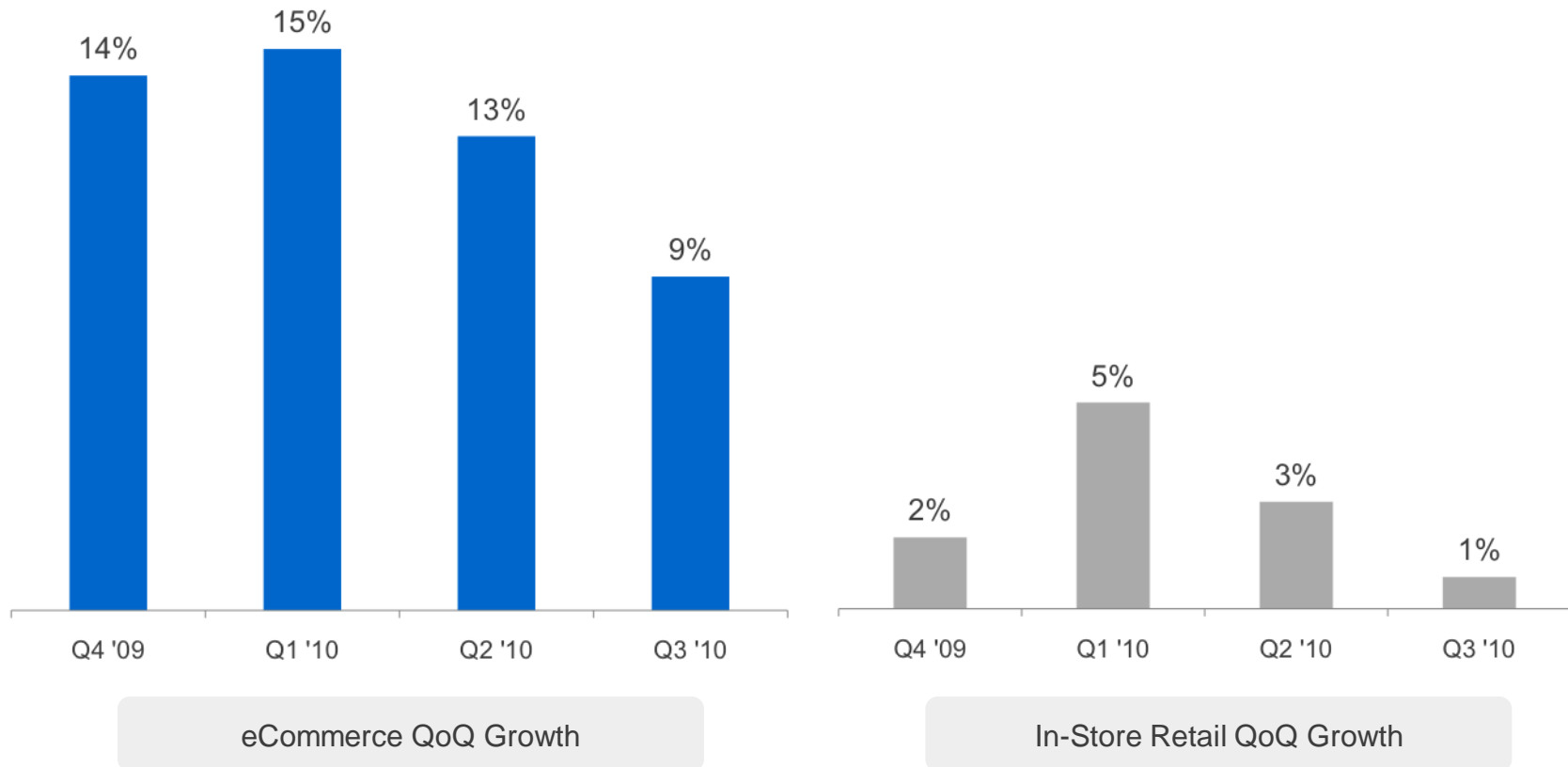


The Connected Consumer

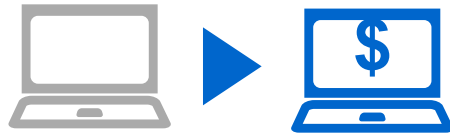


Ecommerce growth outpaces the store

Quarterly Growth Rates for Online & In-Store Retail Sales



Online is key throughout the shopping cycle



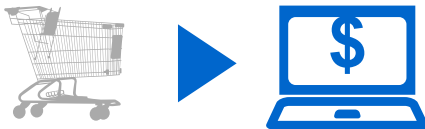
42% research **online** and then buy **online**



51% research **online** and then buy **in-store**



32% research **online**, visit store, then buy **online**

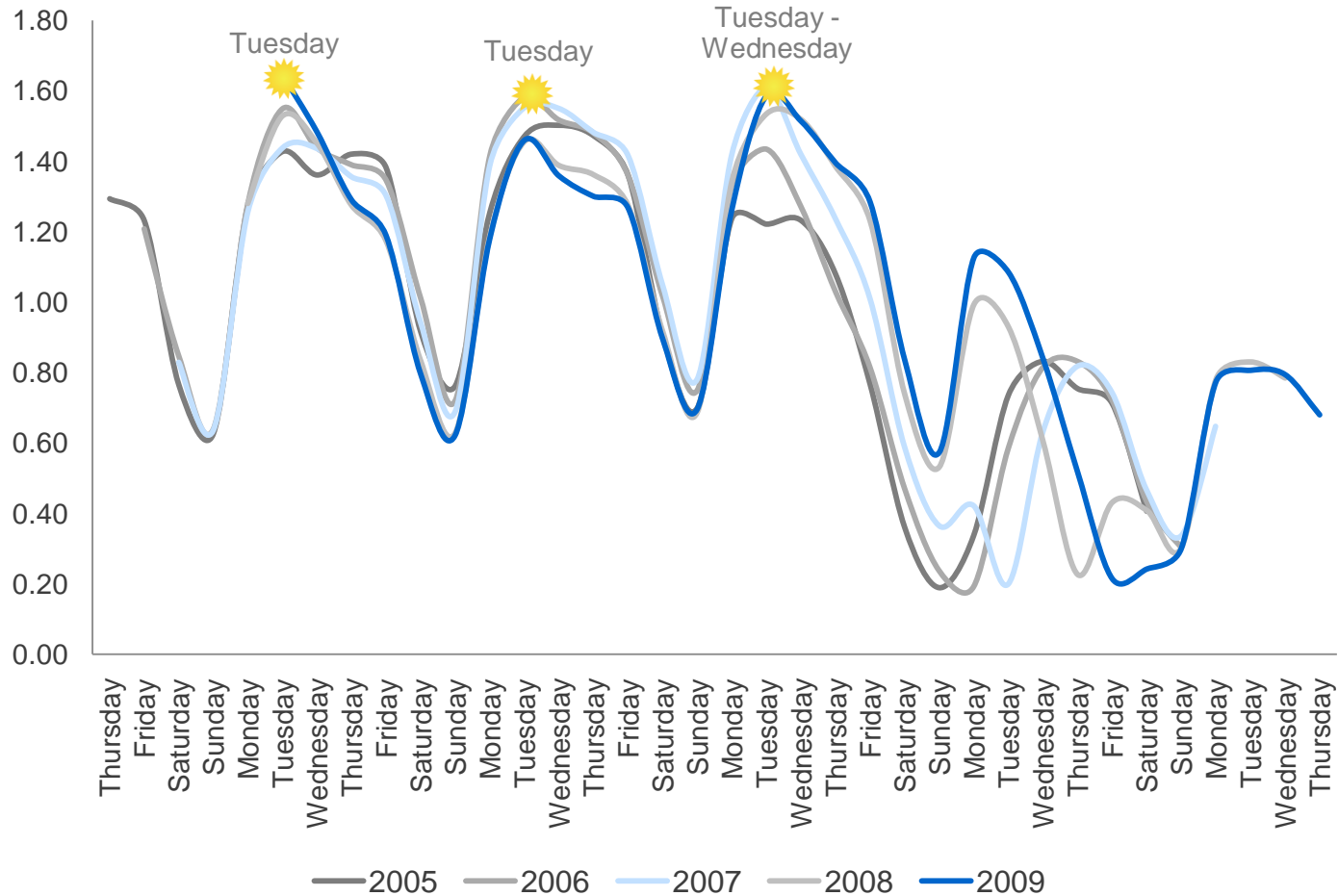


16% visit store, and then buy **online**



Early weekdays are strong for e-commerce

Index of U.S. Online Retail Sales in December



Key eCommerce days 2010

Projected November & December 2010 eCommerce Sales (in \$M)

Mon	Tue	Wed	Thu	Fri	Sat	Sun
Nov 22	23	24	25	26 \$485 Black Friday	27 \$852	28
					-----> Thanksgiving Weekend	
\$775 Cyber Monday	29	30	Dec 1 \$1,003	2	3	4
6	7 \$1,054	8 \$991	9 \$973	10 \$939	11	12
13 \$961	14 \$1,095 Green Tuesday	15 \$1,052	16 \$1,019	17 \$946 Free Shipping Day	18 \$1,029	19
					-----> Weekend Before Christmas	
20	21 \$851	22 \$783	23	24	25	26



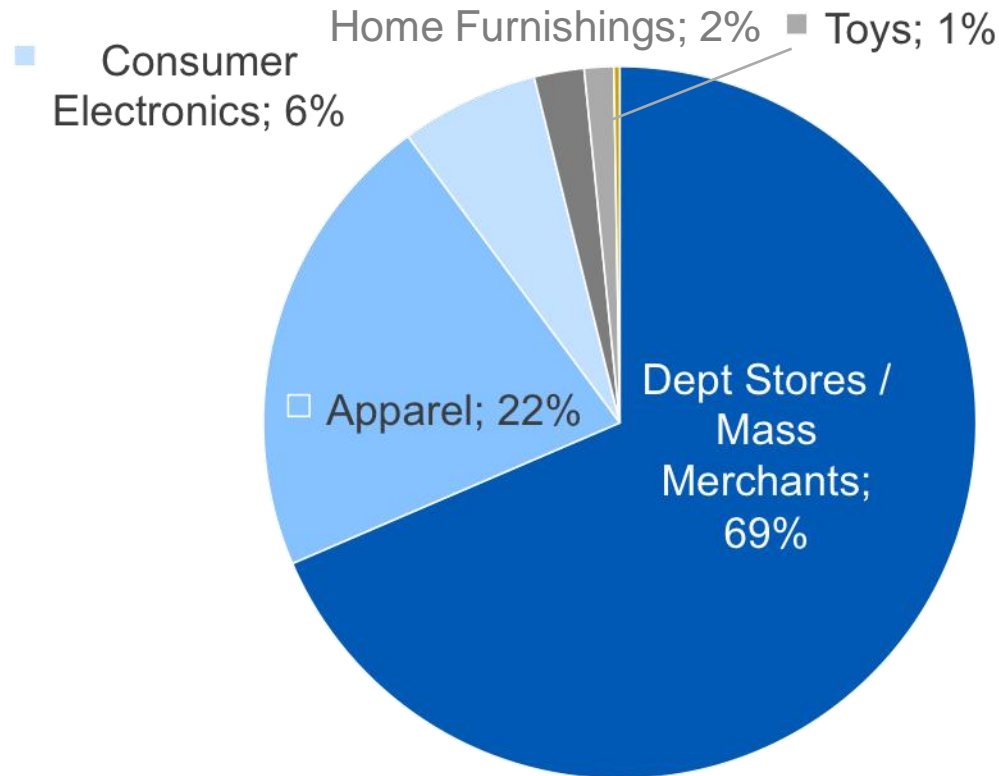
And looking forward to post-holiday sales

64%
plan to shop
post-holiday
sales



Consumers are shopping in big box stores

% of all Retail conversions as of week of 10/11/2010

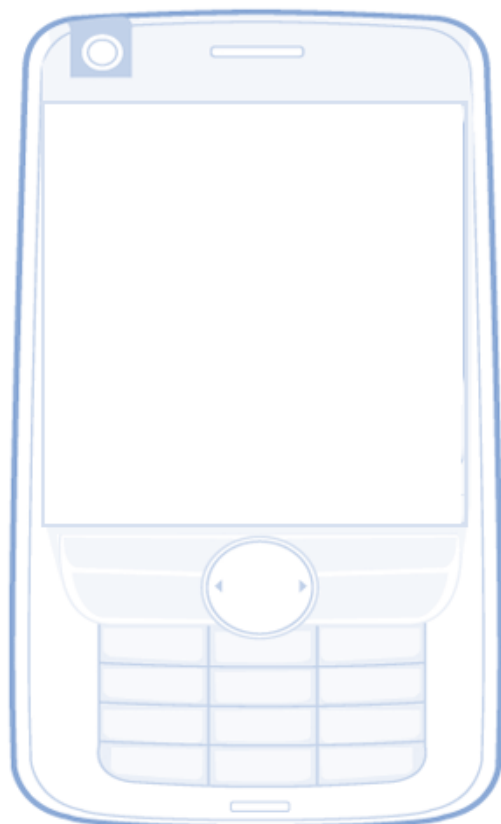


Mobile links shoppers to products and stores

How Smartphone Users Plan To Shop With Their Phones This Holiday Season



80% of smartphone users likely to use apps



% of smartphone users that plan to download/use apps this holiday

Extremely likely	22%
Very likely	26%
Somewhat likely	30%
Not very likely	17%
Not at all likely	4%



New, hot products



Rising product searches: tech

Consumer Electronics & Accessories

- Ipod touch 4g
- Ipod nano 5th
- Ipod touch 32gb
- Slingbox hd
- Slingbox pro
- Kindle
- Apple TV
- Philips 32pf13504d 720p
- Vizio xvt553sv
- Xbox 360 250gb
- Tivo hd
- Blu ray burner

Computers & Accessories

- Archos 101
- Asus 1215n
- Iomega zip drive
- HP pavilion desktop
- Dell optiplex
- Dell ultrasharp
- Android tablet
- Dell latitude d620
- Inspiron 1525
- Macbook pro battery
- Flat panel monitor
- Compact flash memory

Mobile Phones & Accessories

- Samsung fascinate
- Samsung galaxy tab
- LG chocolate touch
- Samsung seek
- HTC incredible battery
- Iphone 4 white
- Boost mobile
- HTC g1
- Virgin mobile mifi
- Nokia c6
- Metro pcs phones
- Nextel phones

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Rising product searches: retail

Apparel, Clothing Labels & T-Shirts

- Homecoming dresses
- Snow boots
- Moccasins
- Sequin dress
- Uggs
- Winter boots
- Black dresses
- Corset
- North face triclimate
- hoodies
- Lucky brand jeans
- Gucci shoes

Toys & Video Games

- Nerf stampede
- Lego nxt
- Science kits
- Dollhouse furniture
- Jumperoo
- Kidkraft kitchen
- Nerf guns
- Power wheels Barbie
- Snuggie
- Playstation move
- Halo reach xbox
- Dead rising

Gems & Jewelry & Watches

- David Yurman
- Zales
- Atomic watch
- Leather gloves
- Sling bag
- Breitling watch
- Crossbody bag
- Guess watch
- Swiss legend
- Automatic watches
- Briefcase
- Citizen eco drive

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Source: Google insights, rising product searches September 2010. Apparel, Clothing Labels, T-Shirts, Toys, Video Games, Gems & Jewelry, Watches categories.

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What are the newest fashions?

JEGGINGS

**LACE
TRIM**

**ANKLE
BOOTS**



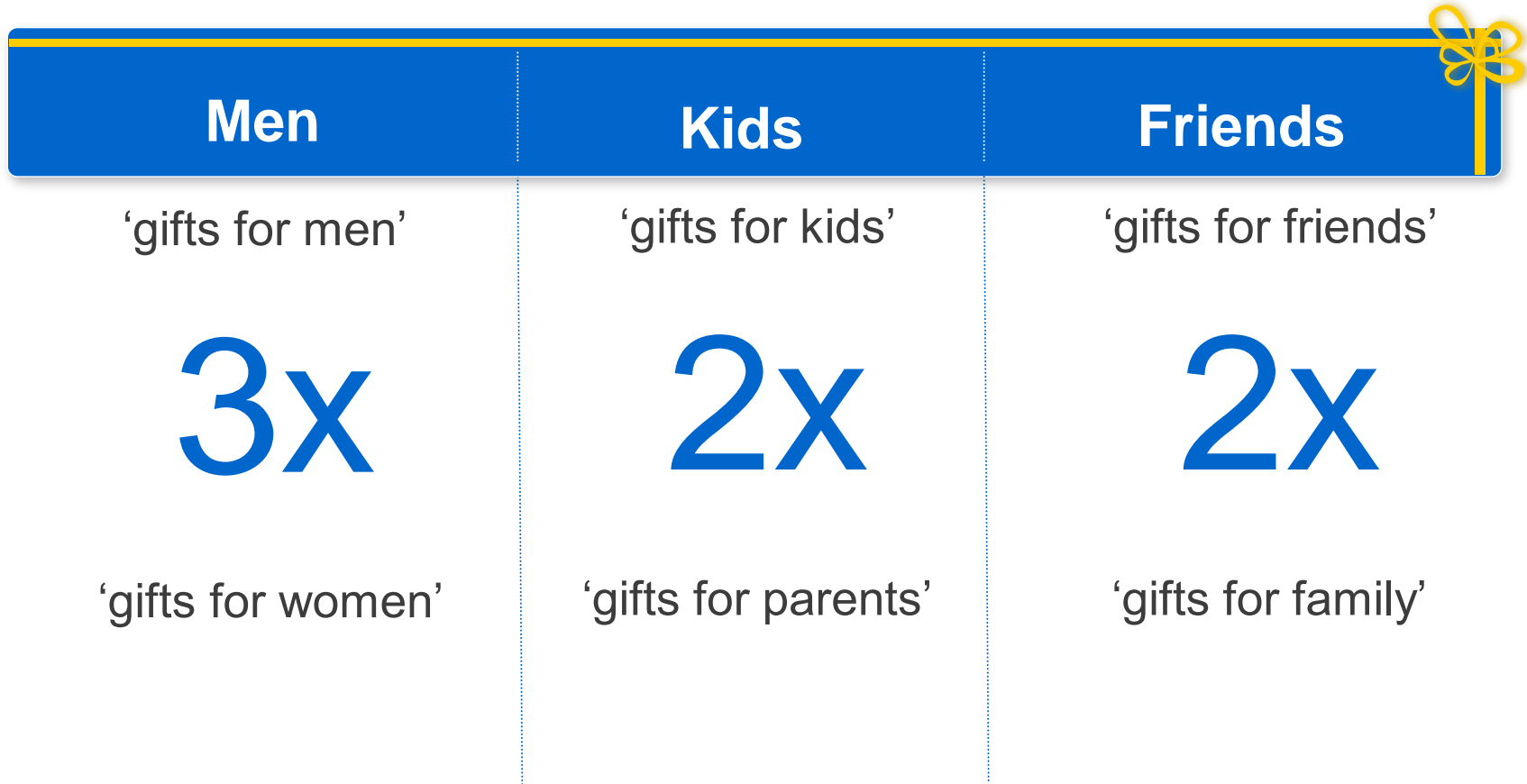
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Source: Search volume from Google Insights for Search.

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Who will receive the most gifts?



Recommendations for Holiday 2010

1 Start holiday messaging now
Holiday shopping is in full swing and lasts until after Christmas.

2 Listen and be nimble
Fastest rising search terms and social media reveal shopper interest.

3 Reach the connected shopper
Use Search, Mobile & Display campaigns to drive sales.



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