

KEYNOTE: YOUR HOLIDAY PERFORMANCE, MULTIPLIED BY GOOGLE AI

To meet the 2023 holiday moment, consider a **consumer-first approach to the season** with the shopper mindsets below and make it **more predictable with AI-powered solutions** in your Google tool kit.



DELIBERATE



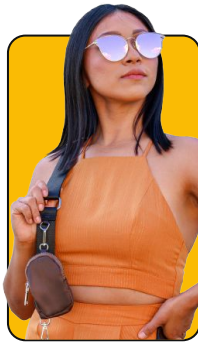
Now - Nov

74% of holiday purchases were planned ahead of time.¹

Online shoppers who are active on social media use, on average, 10 touchpoints to inform and evaluate purchases are inspired by an influencer.²

87% of holiday shoppers reported using a Google property like Search, Maps or YouTube as a shopping resource.³

By the end of October, half of Americans are shopping for holiday over any two-day period and an average of 28% of their holiday shopping is complete⁴



DEAL-SEEKING



Cyber

Shopping-related searches for “deals” grew by 2,300% week of Black Friday/Cyber Monday.⁵

70% of “Black Friday” shopping-related searches moment happen before the day itself.⁵

Consumers spent as much in the 3 days post-Cyber Monday as much as they spent on Black Friday and Cyber Monday combined.⁶



DETERMINED



December

Shoppers have half of their shopping complete by the beginning of December.⁷

More than half of shoppers used five or more channels to shop over a two-day period.⁸

Online search was used before 95% of in-store holiday shopping occasions.⁸

US consumer spending on weekdays during the holidays continues to increase annually. Last holiday season, consumers spent on average \$4.2B on weekdays and \$4.4B on weekend days.⁹



DEVOTED



Post-Season

US consumers spent \$47 billion dollars in retail in the two weeks post-December 25th.¹⁰

57% of holiday shopping occasions were self-gifting between December 26th and January 4th, which is significantly higher than the year before.¹³

WANT TO LEARN MORE?

Tune in to [Think Retail on-demand](#). Partner with your Google team to receive curated recommendations to ensure peak holiday readiness across all shopper mindsets.

Sources: 1. Google/Ipsos, Holiday Shopping Study, online survey, Americans 18+ who conducted holiday shopping activities in the past two days, n=10,507 purchases, Oct. 2022-Jan. 2023; 2. Ipsos commissioned by Google, Passive Shopping Survey, AR, AU, BR, CA, CL, CO, FR, DE, IN, ID, IT, JP, MX, NL, PE, PL, SG, ES, KR, AE, U.K., U.S., shoppers (13+) that made an online purchase in the past month and use social media at least weekly; shopper saw an influencer with the item purchased, n=3,836, March 2023-April 2023; 3. Google/Ipsos, Holiday Shopping Study, AR, AU, BE, BR, CA, CL, CO, DK, FI, FR, DE, IT, MX, NL, NO, PE, ES, KR, SE, U.K., U.S., n=84,075 online consumers 18+ who shopped for the holidays in the past two days, Oct. 2022-Jan. 2023; 4. Google/Ipsos, Holiday Shopping Study, Online survey, US, n=1,084, Google commissioned Ipsos Consumer Continuous, US, n=1000 online consumers 18+ per market, July 3-7, 2023; 5. Google Data, US, September 2022 - January 2023; 6. Google/BCG, Holiday Spending Analysis, Analysis of US Mastercard Credit Card Data November 25, 2022 - December 1, 2022. Retail Categories included were: Apparel, Department Store, Electronics, Home Furniture & Furnishings, Home Improvement, Jewelry; 7. Google/Ipsos, Holiday Shopping Study, Oct 13 - Dec 7, 2022, Online survey, Americans 18+ who conducted holiday shopping activities in past two days n=5,906; 8. Google/Ipsos, Holiday Shopping Study, Online survey, US, n=8,467, Americans 18+ who conducted holiday shopping activities in past two days, Oct 13 2022 - Jan 4 2023; 9. Google/BCG, Holiday Spending Analysis, Analysis of US Mastercard Credit Card Data December 26-January 8, 2022. Retail Categories included were: Apparel, Department Store, Electronics, Home Furniture & Furnishings, Home Improvement, Jewelry, Weekday and Weekend Analysis excludes Black Friday, Cyber Monday, Thanksgiving, and December 25th; 10. Google/BCG, Holiday Spending Analysis, Analysis of US Mastercard Credit Card Data December 26-January 8, 2022. Retail Categories included were: Apparel, Department Store, Electronics, Home Furniture & Furnishings, Home Improvement, Jewelry; 11. Google/Ipsos, Holiday Shopping Study, online survey, Americans 18+ who conducted holiday shopping activities in past two days, n=1,823 holiday shopping occasions, Dec. 26, 2022 - Jan 4 2023.

MEET THE HOLIDAY MINDSET BY MOMENT

Meet consumers as the season progresses and their mindset shifts from Deliberate, Deal Seeking, Determined, to Devoted.

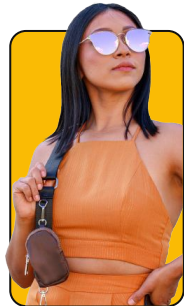
To meet the 2023 holiday moment, leverage a consumer-first approach to the season with the shopper mindsets below while making it more predictable with AI-powered solutions in your Google tool kit to help you stay agile all season long. We recommend early activation on these solutions to maximize impact and to scale these tools in these key mindset moments.



DELIBERATE



Now - Nov



DEAL-SEEKING



Cyber



DETERMINED



December



DEVOTED



Post-Season

DISCOVERY STARTS NOW

This shopper wants to get a jumpstart on **planning** their gift list, looking for reviews, **researching** price, availability and promotions so they're ready to get the perfect gift.

READY, SET, GO

Shoppers are **ready to buy, but on their terms**. They have already done their homework - researching, comparing products, watching videos and now they're ready to get the **best value for their money**.

LAST MINUTE SHOPPING

It's crunch time to get last minute gifts. These shoppers have high intent and are ready to purchase now **wherever** and **however** they can before shipping cut off.

LOYAL SHOPPERS

There is a significant bump in the number of **self-gifting** shopping occasions, which opens up new chances to connect with **loyal shoppers** and build momentum into 2024.

KEY ACTIVATION SOLUTIONS

Your data is your advantage:

Use **Customer Match**, **New & Returning Users**, **Offline Data** and more to your advantage by **surgically targeting** priority and prospective customers.

Evaluate, plan, and scale:

It's time to **scale your test learnings**, and use AI-powered **Budget & Scenario planning tools** like Performance planner to plan for demand.

The Power of AI and YouTube:

Leverage account level **AI powered insights** to make realtime tweaks, and **be present** during discovery with YouTube.

Meet stretched demand:

Capture sustained demand & remain agile with **Performance Max + Broad Match**, while providing accurate information via **Pricing and Promotions Feed annotations**.

Meet the joyful moment:

Be present when shoppers are deal seeking by enabling **Curbside/ Pickup** annotations, and **Video Action Campaigns with Shoppable Product Feeds**.

Breakthrough the noise:

Be there when it matters most with **high impact creative** and formats across search and YouTube.

Accelerate purchasing:

By continuing to **cast a wide net** with Broad Match + **Value Based Bidding**, and providing **accurate & informative shopping feed annotations**.

Send shoppers to stores:

Your store advantage is crucial now. **Highlight your stores** with **Local Inventory Ads**, Omni goals for Video Action Campaigns, and Curbside/Pickup Annotations.

Maintain agility:

Performance Max for eComm and Store Goals, and **Omnichannel bidding** will help you stay agile during this final push.

Strengthen logistics:

with **Merchant Center Reporting & Insights**, accurate **Shopping Feed Annotations**, and **Local Inventory Ads** to help clear off the post-holiday shelves.

Bring back loyalists:

Reach your most loyal customers with Customer Match, Video Reach and Action Campaigns, Shoppable Video and **App Promotions**.

Transition from giving to getting:

Scale your real-time learnings from holiday, while leaning back into **AI-powered planning tools** like Performance & Reach Planner.

WANT TO LEARN MORE?

Tune in to [Think Retail on-demand](#). Partner with your Google team to receive curated recommendations to ensure peak holiday readiness across all shopper mindsets.

SETTING THE HOLIDAY TABLE: MAXIMIZE THE DIGITAL OPPORTUNITY THIS SEASON

This holiday and beyond, the ability to stay agile in order to capture maximum demand will be your recipe for success. Learn how to set your holiday table with solutions to optimize your full digital marketing opportunity, and tools that will unlock helpful shopper behaviors and merchandising insights.

KEY INSIGHTS



Set AI as foundation to capture consumer demand.

74%¹ of shoppers start their journey without knowing exactly what they are going to buy. To capture this shift, tap into AI-powered ads to cast a wide net.



Align budget to demand through the end of the year. Shoppers path to purchase is non-linear, with 40% of holiday shoppers “always on” to find the perfect gifts.² And the shopping season continues to expand, with over 80% of search demand from September through the end of the year outside of Cyber week.³ Align budgets, targets and investment mix to capture these shoppers and deliver maximum value for the business.



Adapt to shopper mindsets to capture the bulk of demand.

Omnichannel shopping is important throughout the season, but there is variances in what retailer competitive advantages stand out. Return policy picks up in October, promotions become critical during Cyber Week and on Christmas, while near me is critical on Black Friday and after shipping cutoff dates.

Sources

1. Google/Bain, Future of Retail, US, 2022. N=2114 Representative Sample, Q3 2022. (2) Google Internal Data. 2023. 2. Google/Ipsos, “Holiday Shopping Study” Oct 13 - Jan 4, Online survey. (1) Holiday Shoppers, n=7202; (2) Holiday Shopping Occasions - Purchases, n=10,507 (3) Google/Ipsos Essentials Survey, Sept 8-12, Started Early shoppers, n=287 3. Google Internal Search Data

SOLUTIONS



Set AI foundation to cast a wide net.

- Maximize performance by using AI best practices, like a simplified account structure, [conversion data signals](#), high quality image and text assets and complete SKU/keyword coverage.
- Understand and prove impact with a line-of-sight into media performance. This is achieved through measurement infrastructure and a rigorous test and learn program.
- Maximize scale and capture the most profitable traffic with flexible budgets and [target-based management](#).



Align budgets with key periods to remain agile.

- Plan and set the right budgets by using [Performance Planner](#) to forecast optimal targets and budgets for your business outcomes during peak season.
- Optimize budgets before & during seasonal periods. [Recommendations](#) will help capture increase in interest with unconstrained budgets, while [Campaigns Simulators](#) will help identify conversion value and investment mix scenarios to deliver maximum returns.
- Efficiently manage budgets by implementing [shared budgets](#) and how budget is delivering on goals with [insights](#) and [Performance Max insights](#).



Differentiate beyond promotions.

- Better understand customer and competitive landscape with [Merchant Center Insights](#).
- Deliver on last minute demand via upsell and cross-category purchases via omni strategy with [Performance Max for Store Goals](#).
- Ensure [creative coverage](#) for each holiday mindset. This means 4+ unique image assets, 1+ RSA with good or excellent ad strength and business information.

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SPREAD THE HOLIDAY MAGIC: MEET YOUR OMNI CUSTOMERS WHEREVER THEY ARE

Shopping behavior is no longer linear and spreads across multiple touchpoints and channels. Take full advantage of your stores and omni intent signals this holiday to help your customers shop across online and offline channels with ease.

KEY INSIGHTS



The value of your storefront is here to stay & will be your strategic advantage this holiday season. With in-store revenue forecasted to reach \$23.4 trillion in 2023,¹ know that you have a strategic advantage against online-only retailers throughout the entire season, but especially as you meet the Determined shopper in December.



Digital is a key driver for store traffic. Retailers that are showing up AND enabling seamless Omnichannel experiences are poised to win shoppers because consumers are increasingly leveraging digital and in-store resources to make these final decisions. This past holiday season, more than half of shoppers used five or more channels, like video and social media, to shop over a two-day period, and across the US, online search was used before 95%² of in-store holiday shopping occasions.



Omnichannel shoppers are more valuable. Customers don't view your website and store in a silo, to them it is the same experience of your brand. And customers that shop with you across more than one channel are more engaged with your brand and more valuable. Omnichannel shoppers spend 2.5x more than single channel shoppers.³

1: Source: eMarketer 2022 Global Retail Sales forecast link

2: Source: Google/Ipsos, "Holiday Shopping Study," Oct 2022–Jan 2023

3: Source: Google/Ipsos, Holiday Shopping Study, Online survey, US, 18+ who shopped for the holidays in the past 2 days and made purchase(s) - 1-2 Channels (n=582); 5+ Channels, Oct 13, 2022 - Jan 4, 2023.

SOLUTIONS



Use omni as a profitable customer signal.

- [Include store visits in your Smart Bidding conversion goals](#), and automatically adapt to omni shopper behavior between digital and physical worlds
- Activate first party customer data to reach your highest value customers. Use [customer match](#) for omnichannel and in-store shoppers. Consider uploading purchase data to be able to bid to [store sales](#).
- Tune conversion optimization with [Conversion value rules](#) for first party audience, geo, and [store visits](#) or sales to prioritize the most profitable shopper segments.
- Use [pickup](#) to increase coverage for your in-store products and prioritize customer preference.



Tune store visit value with intention.

- Tune values up on categories and/or SKUs with excess inventory to help clear shelves.
- Wrap-up testing to implement learnings for holiday. There is a new A/B testing tool for Omnibidding for Shopping in Google Ads and incrementality testing options available for Performance Max for Store Goals.
- Use omnibidding and Performance Max for Store Goals as a lever to scale into more online auctions, in addition to lowering targets. While omnibidding auctions begin online, they may convert offline.



Be omni-present with Performance Max, LIA and YouTube.

- Ensure full coverage of store goals across all Google experiences and full coverage with [Local Inventory Ads](#) by using a [catch-all campaign](#) and Zombie SKUs campaign.
- Make sure store deals are visible to customers online. Use [Merchant Promotions](#) for Local Inventory Ads, Store Coupons pilot for Performance Max for store goals, and promotional creative in Video Action Campaigns to drive awareness of your promotions.
- Heavy up on offline driving tactics post-shipping cutoff to do a final push to stores. Consider using a [Performance Max for Store Goals](#) to promote must-win categories and flighted "Burst" Campaigns throughout the holiday season.

WANT TO LEARN MORE?

Tune in to [Think Retail on-demand](#). Partner with your Google team to receive curated recommendations to ensure peak holiday readiness across all shopper mindsets.

MAKE THE MOST OF YOUR SHOPPING FEEDS THIS SEASON

Shopping Feeds and policy hygiene are the foundation of any good holiday strategy. Maximize the Shopping opportunity to serve customers exactly what they're looking for by capitalizing on key best practices to make your feeds as robust and relevant as possible, while staying in compliance this holiday.

01

ENSURE HOLIDAY READY DIGITAL STOREFRONT

Here are the steps you can already take now to ensure you are fully prepared for the upcoming Holiday season.

EXPAND PRODUCT COVERAGE

Action: Add products that are in popular demand: Merchant Center > Growth > [Best Sellers](#)

ENSURE HIGH VISIBILITY & SEARCH RELEVANCE

Action: Add [GTINs](#) for all products

Tip: Use the Barcode scanner app, or refer to GS1 tools like [GEPiR](#) to check GTIN correctness.

KEEP PRODUCT PRICE & AVAILABILITY DATA FRESH WITH REGULAR AND FREQUENT UPDATES

Action: Leverage [Automatic Item Updates](#) to help keep your product data up to date.

Tip: Update your feed more than once a day and align the cadence with your website updates for price and availability.

IDENTIFY TOP TRENDING PRODUCTS

Action: Opt into [Market insights](#) to help you plan your inventory vs demand of best seller items.

Tip: Bid up on high demand SKUs in season and incorporate missing SKUs in category insights.

PREVENT THE UNINTENTIONAL REMOVAL OF ITEMS FROM YOUR FEED

Action: Enable the [Product Removal Feature](#) to make sure that Google doesn't delete your feed when a significant drop in items is detected.

Tip: When using this feature you can set custom to fit your needs.

02

ENSURE HOLIDAY READY LOCAL STOREFRONT

Take advantage of your local store presence.

UPDATE YOUR STORE HOURS IN GMB

Action: Update your business information with the [relevant customer facing hours](#).

Tip: Make sure your working hours are up to date to drive in-store traffic.

LEVERAGE LOCAL PROMOTIONS TO DRIVE IN STORE TRAFFIC

Action: Implement [Local Promotions](#) to drive users in-store and enhance your O2O experience.

Tip: By activating Local Promotions you can elevate specific in-store promotions.

RAISE AWARENESS OF YOUR DIFFERENTIATED OMNICHANNEL OFFERINGS

Action: Activate [Pickup Today](#), [Pickup Later](#), or [Curbside Pickup](#) to drive website visits and allow both online conversions and store visits.

Tip: Enable relevant advanced LIA features to differentiate your offerings and provide variety to how users shop.

[WANT TO LEARN MORE?](#)

Tune in to [Think Retail on-demand](#). Partner with your Google team to receive curated recommendations to ensure peak holiday readiness across all shopper mindsets.

03

STAND OUT AMONG COMPETITORS

HIGHLIGHT PRODUCTS ON SALE

Action: Add [sale_price](#) & [sale_price_effective_date](#) attributes to schedule price change

Tip: This will enable you to automatically switch to sale price when your sales period start!

STAND OUT AMONG COMPETITORS

Action: Utilize [Merchant Promotions](#) if you have coupon codes or special promos such as BOGO, free gifts, or % off discounts

Tip: Build out promotions three weeks out and submit early to ensure smooth promotional launches.

SHOWCASE PRODUCTS THAT CAN SHIP QUICKLY

Action: Activate the [Fast & Free](#) and/or [Same Day Delivery](#) annotation to highlight faster shipping speeds vs. competitors

Tip: to further help you stand out, Google Shopping also automatically surfaces free shipping / price drops.

ENABLE RETURN POLICY ANNOTATION TO ESTABLISH TRUST WITH YOUR CUSTOMERS AND DIFFERENTIATE YOUR PRODUCTS FURTHER

Action: Implement Return Policy through the Shipping and Returns Tab

Tip: Update your Return Policy if you are offering holiday specific return policies such as extended return window.

04

PREVENT & RECOVER FROM ACCOUNT SUSPENSIONS & ITEM DISAPPROVALS

BE NOTIFIED WHEN THERE IS AN ISSUE IN MERCHANT CENTER

Action: Ensure you added all the relevant contacts for feeds-related [email notifications](#).

Tip: you can now add more than 2 email contacts for Merchant Center notifications!

REGULARLY CHECK THAT YOUR ACCOUNT IS NOT AT RISK OF SUSPENSION OR ITEM-LEVEL ISSUES

Action: Regularly check the [Diagnostics tab](#).

Tip: During account suspension warning period, you can take advantage of one courtesy account re-review!

FIX ITEM ISSUES THAT CAN UNLOCK A HIGH AMOUNT OF CLICKS

Action: Look at the [Opportunities tab](#) for feed & campaign recommendations that can improve performance. Opportunities will show you product data quality fix & campaign bids & budget fix recommendations.

EASILY UPLOAD FIXED PRODUCT DATA

Action: Take advantage of [Supplemental Feeds](#) & only update attributes that are incorrect!

Tip: Supplemental Feeds need an id attribute column + at least one additional attribute column.

UNPLANNED SITE OUTAGE?

Action: No need to re-upload a feed. Once issue is fixed, ensure we can [crawl your site as fast as possible](#).

Tip: We will automatically prioritize recrawl of the products that are driving the most traffic.

PLANNED SITE OUTAGE?

Action: Check those [recommended best practices](#) on what to do before & after website maintenance.

PREVENTING / UNDERSTANDING ITEM DISAPPROVALS DUE TO IMAGE PROMOTIONAL OVERLAY

Action: Enable [automatic image improvements](#) so Google will try to automatically fix these images.

Tip: Google will try to remove the promotional overlay from the disapproved items and show the outcome in the diagnostics tab so that you can get insights of what is a good quality image for Shopping.

PREVENTING / UNDERSTANDING AUTOMATIC ITEM DISAPPROVALS DUE TO POLICY VIOLATIONS

Action: When eligible, if you think you are facing over-flagging for a specific item, [request a manual review](#).

Tip: Before, ensure that your product is not prohibited / unsupported, & that Feed & Landing page title & descriptions & product_type don't contain problematic terms or edgy claims. Note: Not all items are eligible for a manual review.

CELEBRATE THE SEASON: INSPIRE AND DELIGHT CUSTOMERS THROUGH YOUTUBE

As consumer mindsets shift across the season, building and sustaining brand love and loyalty with high value customers will be more important than ever to capture the demand. Learn how to leverage YouTube's robust full funnel Shoppable Video and creative solutions so you can be present across discovery, consideration, and action this holiday.

KEY INSIGHTS



Be there in the moments of discovery with a full funnel YouTube strategy. A full funnel YouTube strategy drives 10% ROI vs. Awareness only advertising. And YouTube advertisers see brand video driving 28% of their conversion assists.¹



Breakthrough the noise with more effective ads that maximize paid media impact. Brands and retailers that follow creative best practices have seen a 30% lift in short-term sales likelihood and 17% lift in long-term brand contribution.²



Creative is your competitive advantage. Only 30% of ads on YouTube follow creative best practices.³ Leverage the ABCDs of creative to breakthrough the noise and stand out as shoppers mindsets shift throughout the season.

Source:

1. Google/Nielsen, U.S., Meta-analysis of MMM across 21 CPG brands.

2. Google/Kantar LINK AI, The Short & the Long of ABCDs Effectiveness, Global, Apr 2021, n=11,000 ads. Linear Regression using the intercept as the baseline score (ads with no ABCD features) compared with ads optimized for the ABCDs (including the top 5 core drivers). Country and brand category were included in control variables.

3. Nielsen/Google US + Southeast Asia MMM CPG analysis

SOLUTIONS



Plan out a full funnel YouTube program to capture demand.

- Add [vertical, square, landscape assets](#) to maximize creative variations to drive more conversions at the same or better efficiency.
- Reach and engage with high value shoppers by scaling [Video for Reach](#) campaigns with new audience personas and enable optimized targeting for new prospects.
- Prepare your digital storefront by resolving any image or offer errors in Google Merchant Center.
- Align [bid strategy with your business objectives](#) to drive better results based on efficiency (tCPA) or profitability (tROAS, Max Conversion Value).



Use creative [ABCD best practices](#) to maximize impact.

- Attention: Grab attention in the first five seconds and then keep them watching with an immersive story.
- Branding: Brand early, often and richly so people remember your brand.
- Connection: help people think or feel something with your creative.
- Direction: Give people a call to action in your creative.



[Tune creative for your objectives.](#)

- Awareness: Get your brand noticed in 15 seconds or less & find reach with 2+ formats to reach a wider audience for cost efficiency.
- Consideration: Make room to include longer form ads & let users choose to watch your message with skippable ads.
- Action: Be focused and clear your message to convert to action & close the deal with conversion-based format to grow ROI in a cost-efficient manner

WANT TO LEARN MORE?

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