

December 9, 2020

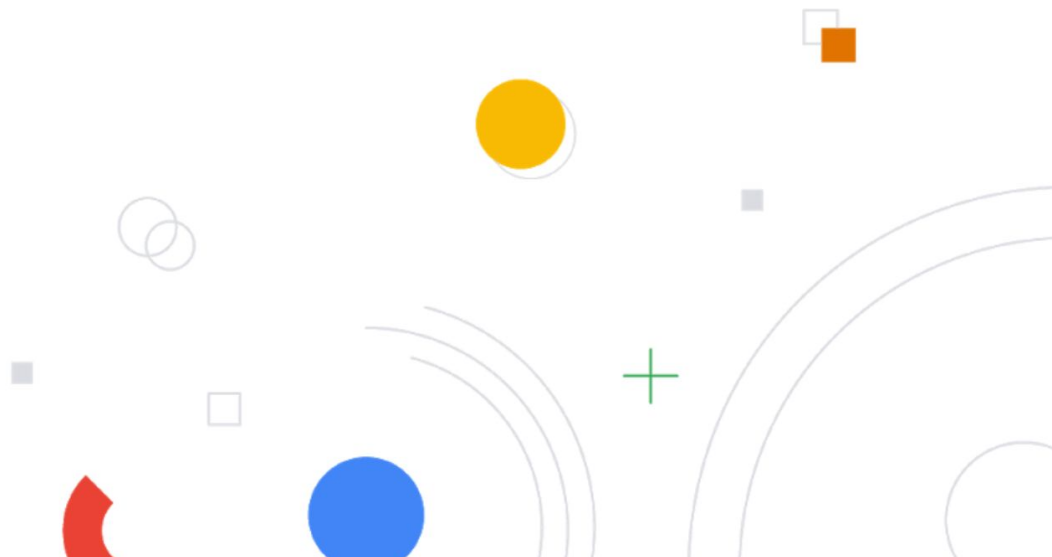
# The Insights Briefing

A biweekly look at changing behaviors around the globe.

# At a glance

**Each month, the Google Ads Research and Insights team analyzes data sets comprising billions of recent search queries and consumer behaviors to develop a deep understanding of key trends.**

This month, we found the global holiday shopping season in full swing, with many people getting things done digitally. On average, 57% of holiday shoppers surveyed across select countries say they'll shop online more for the holidays. As holiday season approached, we saw increased searches for online deals for “air fryers,” “mixers,” and “laptop black friday deals.” People are seeking inspiration for holiday gift giving, looking for “stocking stuffer ideas” and “last minute diy gifts.” With so many people staying closer to home for the holidays, we’ve seen increases in things like “drive through Christmas lights,” cooking holiday meals at home, and shipping gifts to loved ones. And they’re spreading joy by sending holiday GIFs and seeking it by searching for “Christmas movies on \_\_\_\_.”





## What people are thinking

Holiday shopping has seen an increased shift online as consumers try to stay healthy this season. In addition, many are shopping at local small businesses.

- On average, **66% of holiday shoppers** surveyed across select countries say they'll be **browsing for gift ideas online this season, not in stores.**  
Google-commissioned Ipsos COVID-19 tracker, US, CA, UK, FR, DE, IT, AU, JP, RU, IN, CN, BR, MX, ES, ZA, KR, n=5399 online consumers 18+ who will shop for the holiday season. Survey Dates: Nov 19–22.
- On average, **57% of holiday shoppers** surveyed across select countries say **more of their holiday shopping will be online.**  
Google-commissioned Ipsos COVID-19 tracker, US, CA, UK, FR, DE, IT, AU, JP, RU, IN, CN, BR, MX, ES, ZA, KR, n=5399 online consumers 18+ who will shop for the holiday season. Survey Dates: Nov 19–22.
- On shifts to online shopping: "I didn't have this [online buying] habit before. **Now I am buying frivolous things for myself, but also able to buy groceries and toiletries ... online!**"  
Google/The Green Room Collective, U.S., n=50 in-depth interviews, A18-75, Sep 2020–Oct 2020.
- On average, **56% of holiday shoppers** surveyed across select countries say they **plan to shop more at local small businesses** this season.

Google-commissioned Ipsos COVID-19 tracker, US, CA, UK, FR, DE, IT, AU, JP, RU, IN, CN, BR, MX, ES, ZA, KR, n=5399 online consumers 18+ who will shop for the holiday season. Survey Dates: Nov 19–22.

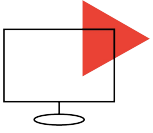


# What people are searching for

We've seen increased searches for online deals for **air fryers**, **mixers**, and **laptop black friday deals**. People are looking for gift-giving inspiration – searching for **stocking-stuffer ideas** and **last-minute DIY gifts**. They're also looking for safe ways to holiday, whether it's a **drive through Christmas lights**, enjoying a **family movie night**, cooking **holiday meals** at home, or shipping gifts to loved ones. And they're spreading joy online by sending **holiday GIFs** and seeking it by searching for **Christmas movies on \_\_\_\_**.

Digital Deals	Something for Everyone	New Ways to Holiday	Spreading Joy
<ul style="list-style-type: none"> <li>Searches for <b>"what is the cheapest"</b> have grown globally by over 50% YoY (what is the cheapest dog, what is the cheapest rolex, what is the cheapest car insurance, what is the cheapest car, what is the cheapest iphone, what is the cheapest tesla).</li> <li>Searches for <b>"air fryer black friday"</b> have grown globally by over 600% WoW (air fryer black friday deals, air fryer black friday, walmart air fryer black friday, ninja air fryer black friday, instant pot air fryer black friday, air fryer black friday deals 2020).</li> <li>Searches for <b>"mixer black friday"</b> have grown globally by over 100% YoY (stand mixer black friday, kitchen aid stand mixer black friday, kitchenaid artisan mixer black friday, hand mixer black friday, kitchen aid mixer black friday).</li> <li>Searches for <b>"laptop black friday deals"</b> have grown globally by over 60% YoY (laptop black friday deals, 2 in 1 laptop black friday deals, best laptop black friday deals 2020, gaming laptop black friday deals, best laptop black friday deals).</li> </ul>	<ul style="list-style-type: none"> <li>Image Searches for <b>"last minute diy gifts for"</b> have grown globally by over 400% YoY (last minute diy gifts for friends, last minute diy gifts for bestfriends, last minute diy gifts for grandpa, meaningful last minute diy gifts for boyfriend, last minute diy gifts for mom).</li> <li>Searches for <b>"stocking stuffer ideas for"</b> have grown globally by over 70% YoY (stocking stuffer ideas for mom, stocking stuffer ideas for adults, stocking stuffer ideas for kids, stocking stuffer ideas for women, stocking stuffer ideas for men).</li> <li>Searches for <b>"unique gifts for"</b> have grown globally by over 90% YoY (unique gifts for boyfriend, unique gifts for friends, unique gifts for teenage girl, unique gifts for women, unique gifts for men).</li> </ul>	<ul style="list-style-type: none"> <li>Searches for <b>"drive through christmas lights"</b> have grown globally by over 400% YoY (drive through christmas lights 2020, drive through christmas lights near me, drive through christmas lights texas, drive through christmas lights nj, drive through christmas lights ohio, drive through christmas lights 2020 near me).</li> <li>Searches for <b>"shipping rates"</b> have grown globally by over 90% YoY (fedex shipping rates, ups shipping rates, usps shipping rates, dhl shipping rates, international shipping rates).</li> <li>Searches for <b>"cut christmas trees near me"</b> have grown globally by over 200% WoW (where to buy fresh cut christmas trees near me, self cut christmas trees near me, cut christmas trees near me, fresh cut christmas trees near me).</li> <li>Searches for <b>"turkey gravy recipe"</b> have grown globally by over 100% YoY (easy turkey gravy recipe, best turkey gravy recipe, make ahead turkey gravy recipe, homemade turkey gravy recipe, turkey gravy recipe allrecipes, turkey gravy recipe easy).</li> </ul>	<ul style="list-style-type: none"> <li>Searches for <b>"happy thanksgiving gif"</b> have grown globally by over 8,000% WoW (happy thanksgiving gif images, animated happy thanksgiving gif, happy thanksgiving gif 2020, happy thanksgiving gif funny, family happy thanksgiving gif).</li> <li>Image Searches for <b>"decoration"</b> have grown globally by over 70% YoY (christmas decoration ideas, balloon decoration, diwali decoration ideas, birthday decoration, birthday decoration ideas).</li> <li>Image Searches for <b>"christmas movies on"</b> have grown globally by over 60% YoY (new christmas movies on netflix, good christmas movies on netflix, christmas movies on hulu, christmas movies on disney plus, best christmas movies on netflix).</li> </ul>

Source: Year over Year - Google Data, Global English, Sep 29, 2020 - Nov 27, 2020 vs Oct 1, 2019 - Nov 29, 2019,  
 Week over Week - Google Data, Global English, Nov 21, 2020 - Nov 27, 2020 vs Nov 14, 2020 - Nov 20, 2020



## What people are watching

People are streaming and purchasing digital video content more than ever before. Many are planning family movie night to stay safe and connect with loved ones over the holidays.

- Searches for “**family movies on**” have grown globally by over 100% YoY. Top searches include: “family movies on amazon prime,” “comedy family movies on netflix,” “best non animated family movies on hulu.”

Google Data, Global English, Aug 26, 2020–Oct 24, 2020 vs Aug 26, 2019–Oct 24, 2019.

- “We did this really cool thing when [shelter in place] first started [...] We had **family movie night** every night. We did the Avengers series – all 20 – chronologically, all Harry Potter, Jason Bourne, [etc].”

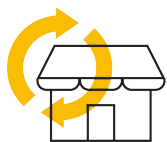
Google/The Green Room Collective, U.S., n=50 in-depth interviews, A18-75, Sep 2020–Oct 2020.

- 74% of subscription video-on-demand (SVOD) subscribers mainly watch new series, but they increasingly need to make a choice: **increase their paid subscriptions, switch from one platform to another, or dip in and out.**

Kantar, Global, “Media Trends and Predictions 2021”, Nov 1, 2020.

- From Q1 to Q2 2020, there was a more than **70% jump in US viewers renting movies on streaming services**, and an increase of more than 60% for digital movie purchases.

Interpret Research, US, “As theaters nosedive, viewers are increasingly paying to rent or purchase movies digitally”, Oct 28, 2020.



## What businesses are doing

The pandemic has led to office closures, pauses in advertising, and less confidence from C-suite leaders in being able to drive change. But it has also led advertisers to invest in more agile ways to reach consumers, like social media and digital advertising.

- 96% of advertisers believe **the pandemic will have long-term strategic implications**: primarily, an increased focus on campaign effectiveness and more investment in digital media for greater agility.

Kantar, Global, "Media Trends and Predictions 2021", Responses from 733 senior-level (Mgr/Dir+) marketers across advertisers/brands, November 1, 2020.

- Leaders across nearly every C-suite are feeling **significantly less confident than they were a year ago** about their ability to influence peers and drive changes. In 2019, 55% of CEOs said they were confident. In 2020, that dropped to 35%.

Deloitte, Global, "Deloitte Global Marketing Trends C-suite Survey", October 1, 2020.

- The pandemic **forced marketers into unprecedented action**, including closing offices, stopping agency reviews, and tweaking or stopping certain advertising.

Ad Age, "A Regularly Updated List Tracking Marketers' Response to Coronavirus", November 18, 2020.

- L'Oréal Paris introduced its **first line of virtual makeup**. Digital marketing channels have become more important for the brand to reach young consumers who are heavy users of social media and are most likely to buy its products.

Robert Williams, "L'Oréal offers first line of virtual makeup for social media, video calls", *Marketing Dive*, November 6, 2020.



## More food for thought

- Best Buy is testing new store formats as a proof of concept for stores as fulfillment hubs. The remodels limit SKU assortment to the most popular items and reduce the shoppable area nearly by half, allowing space for pickup/ship from store.

Shefali Kapadia, "Best Buy tests limited SKUs on store floor to make space for fulfillment", Retail Dive, Nov 30, 2020.

- Retailers like Ralph Lauren, Groupe Clarins SA and Gap Inc. are experimenting with virtual stores. "When Covid-19 is done, we expect to see a very big increase of traffic into our stores," said David Lauren of Ralph Lauren.

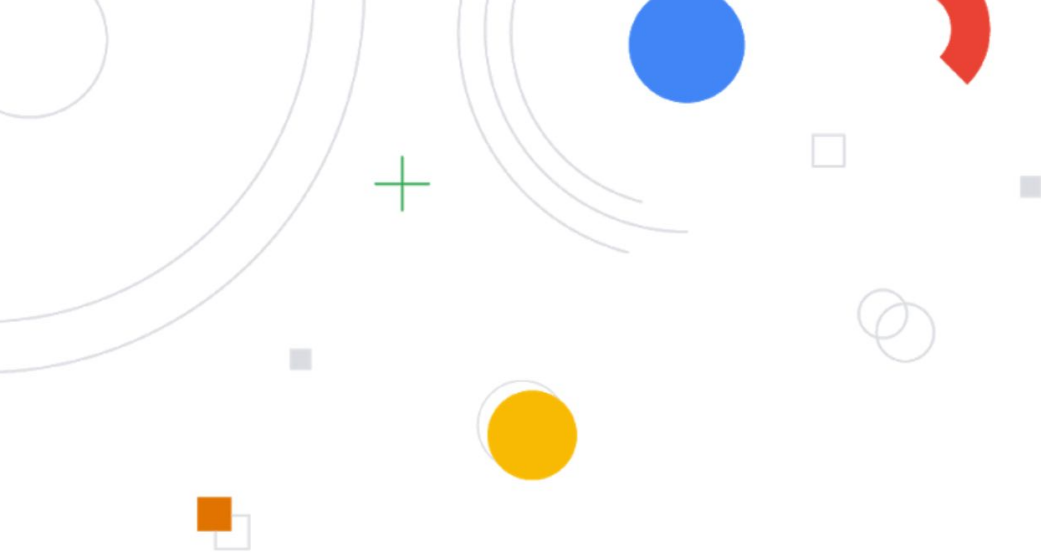
Ann-Marie Alcántara, "Virtual Stores Present New Experiences to Shoppers Who Miss the In-Store Feeling", Wall Street Journal, Nov 23, 2020.

- Coach used to produce 1,000 handbag models each season, but now is only making 500, according to Todd Kahn, the brand's president and CEO. "We don't need three types of red," Mr. Kahn said.

Suzanne Kapner, "Retailers Cut Back on Choices; 'We Don't Need Three Types of Red'", Wall Street Journal, Nov 23, 2020.

- Discovery shared their planned international streaming strategy, which follows Disney+. "We felt it was important that ... we really own real-life nonfiction ... and that we have a huge amount of original compelling content."

Kelsey Sutton, "Discovery+ Doesn't Want to be the Next Netflix. It's Targeting Disney+ Instead", Adweek, Dec 3, 2020.



# Hungry for more?

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