



# Pre- Holiday 2012 Consumer Intentions

Holiday Shopping Intentions Study 2012

Google / Ipsos OTX

US, October 2012

# Methodology

- Google commissioned Ipsos OTX, an independent market research firm, to gain a better understanding of consumers' shopping intentions for the upcoming 2012 Holiday Season
- Interviews were conducted via an online quantitative survey from 8/20/12 – 8/27/12, yielding a total sample of 1,500 holiday shoppers
- Trended comparisons were made throughout the report to data collected from 2008 through 2011, where applicable
  - Note- the 2012 wave was fielded about one month earlier than prior years

# Key Takeaways

- 1 Capture Consumer Demand:** 54% of consumers will start holiday shopping before Black Friday

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- 2 Make Sure Your Brand is Top of Mind:** 46% of consumers plan to spend more time shopping around for gifts this year because of the economy

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- 3 Open Attribution Window:** While consumers are researching early, 31% plan to do the majority of their holiday shopping in early/mid December

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- 4 Capture undecided holiday shoppers with search:** 37% of consumers say search is their go-to source for gift ideas, and 51% plan to research online but buy in-store

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- 5 Implement full coverage for mobile and tablet:** 4 in 5 mobile/tablet owners will use their device for holiday shopping, and mobile users continue searching after Christmas

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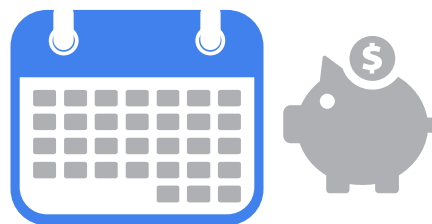
What are consumers excited to buy and when will they shop?

# While consumers plan to spend more this year, they also plan to research more before buying



Consumers plan to spend **\$900** on holiday shopping this season, vs. \$854 last year

**21%** plan to spend more than in 2011



**46%** plan to spend more time shopping around for gifts this year because of the economy



**53%** plan to research holiday purchases online more this year than in 2011



# ...But plan to shop across all major retail categories:

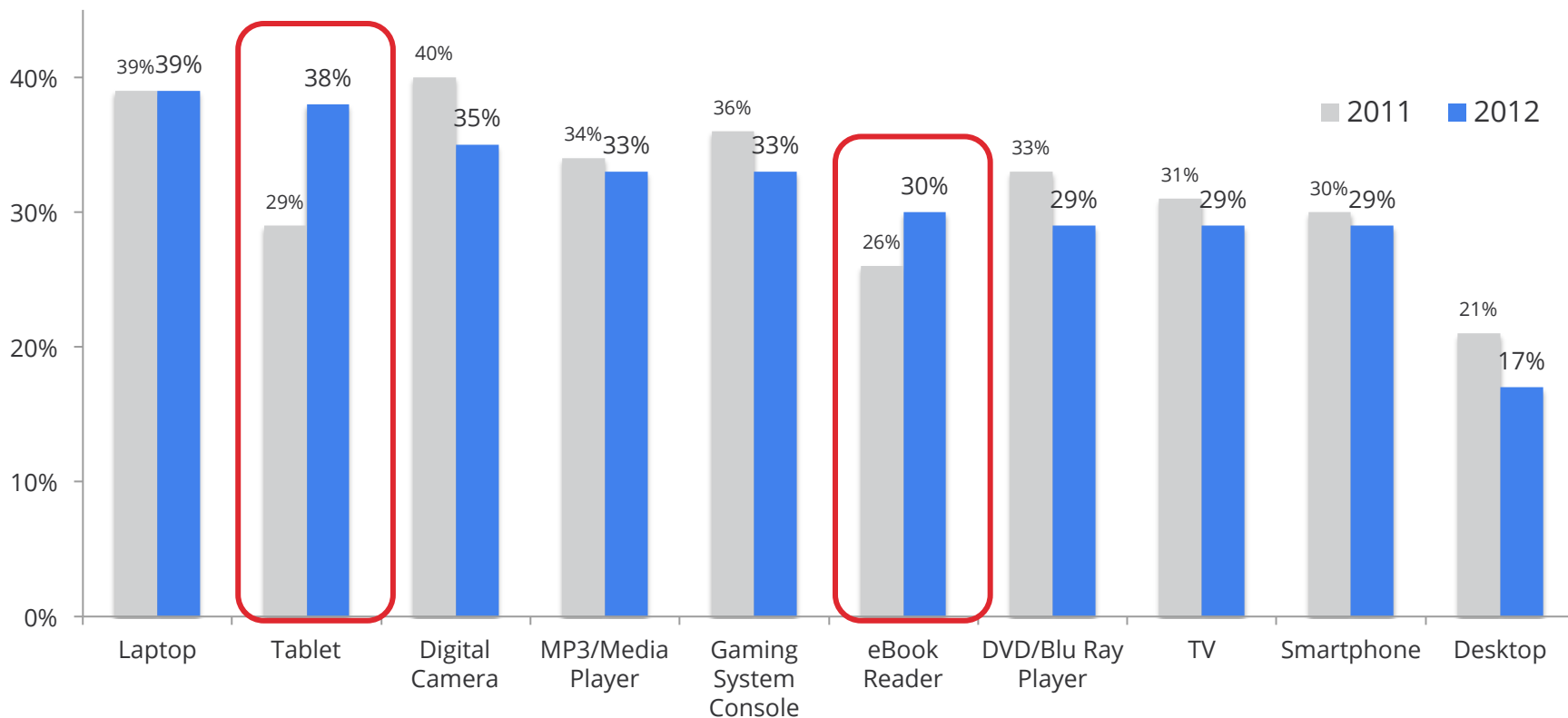
Products shoppers intend to purchase this year  
 (Percentage of consumers answering 'YES' for each category)



# Tablets and eBook Readers continue to spark growth for electronics this year

## Electronics or Technology Planning to Purchase

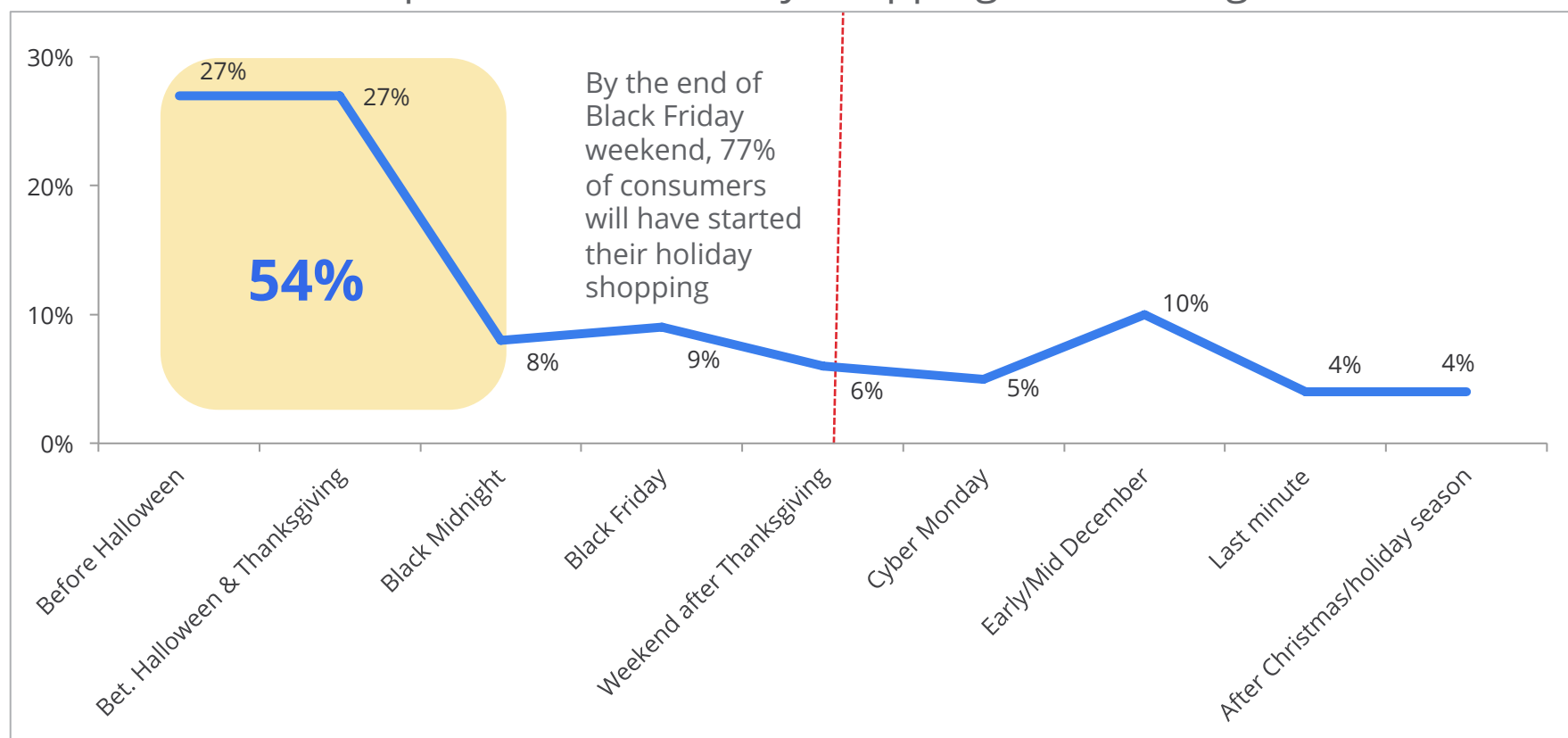
Base: consumers who plan to/may purchase electronics during the holiday season





# Similar to last season, 54% of consumers will start holiday shopping before Black Friday

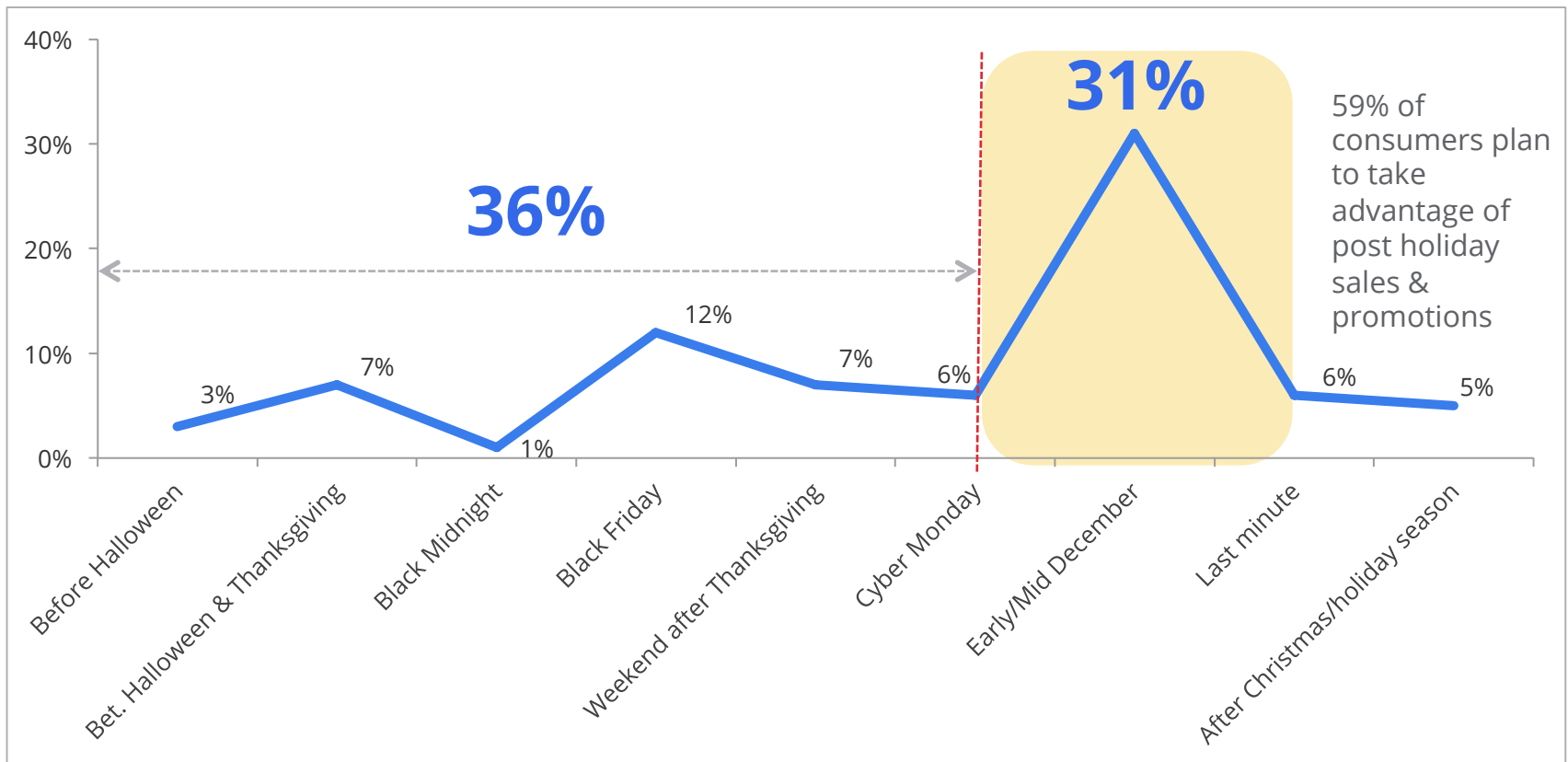
When consumers plan to start holiday shopping/researching



# 36% of consumers plan to do the majority of their holiday purchasing by end of Cyber Monday

...but almost 1 in 3 plan for early/mid December to be their heavy buying time

When consumers plan to do majority of holiday purchasing

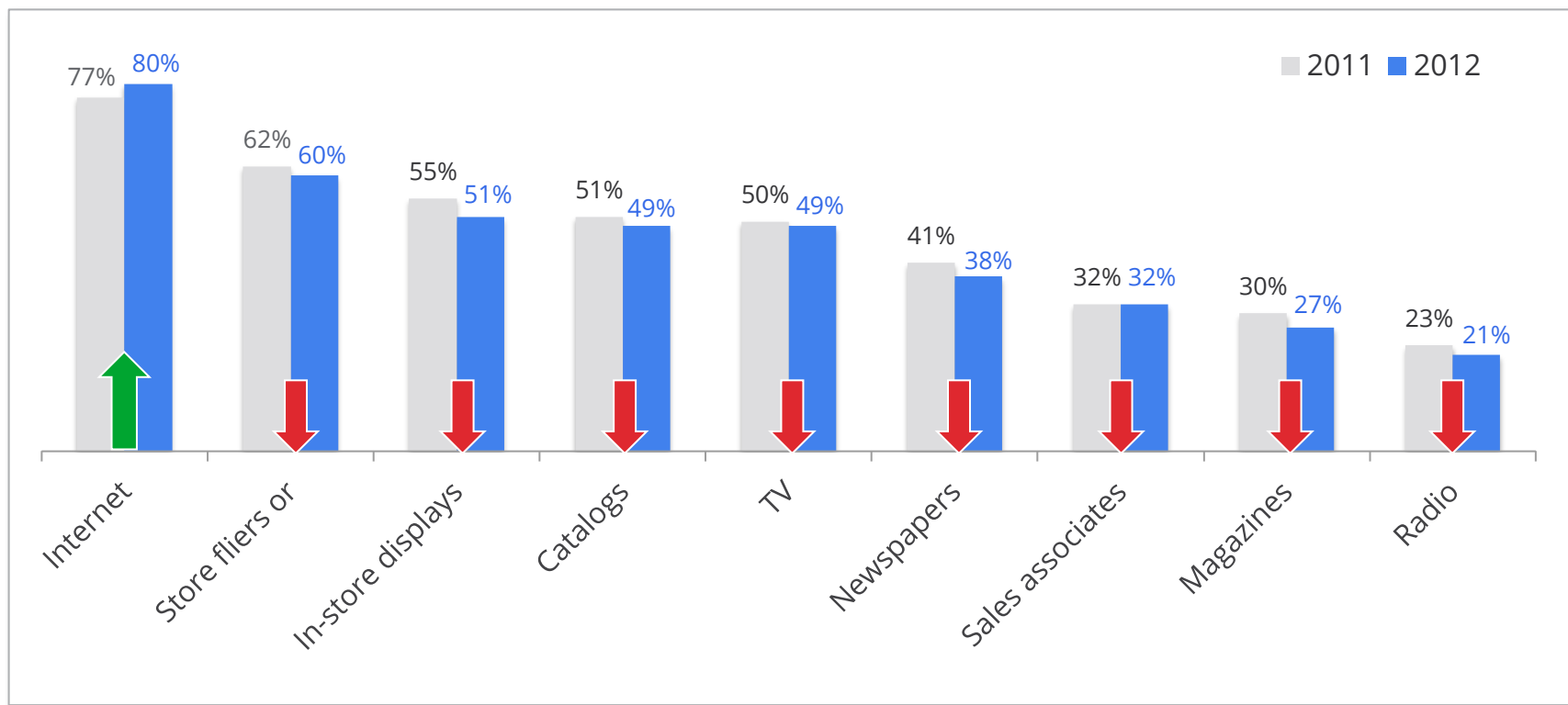


Source: Ipsos OTX/Google 2012 Holiday Shopping Intentions Survey Wave 1: (Q2). And, when do you plan to do the majority of your holiday purchasing? (Q16) Using the scale below please tell us how much you agree or disagree with the following statements about shopping during the holiday season (59% includes top 2 box responses).

How will consumers research  
before purchasing this holiday  
season?

# Consumers will rely more on internet, and less on traditional offline sources, for holiday shopping

Most useful information sources for holiday shopping, year-over-year  
(Percentage of consumers ranking 'most useful')



# Online will heavily impact type of gift, brand, and retailer of choice

Over 1/3 of consumers say the internet will heavily influence the following choices:



type of gift(s) I buy  
36%



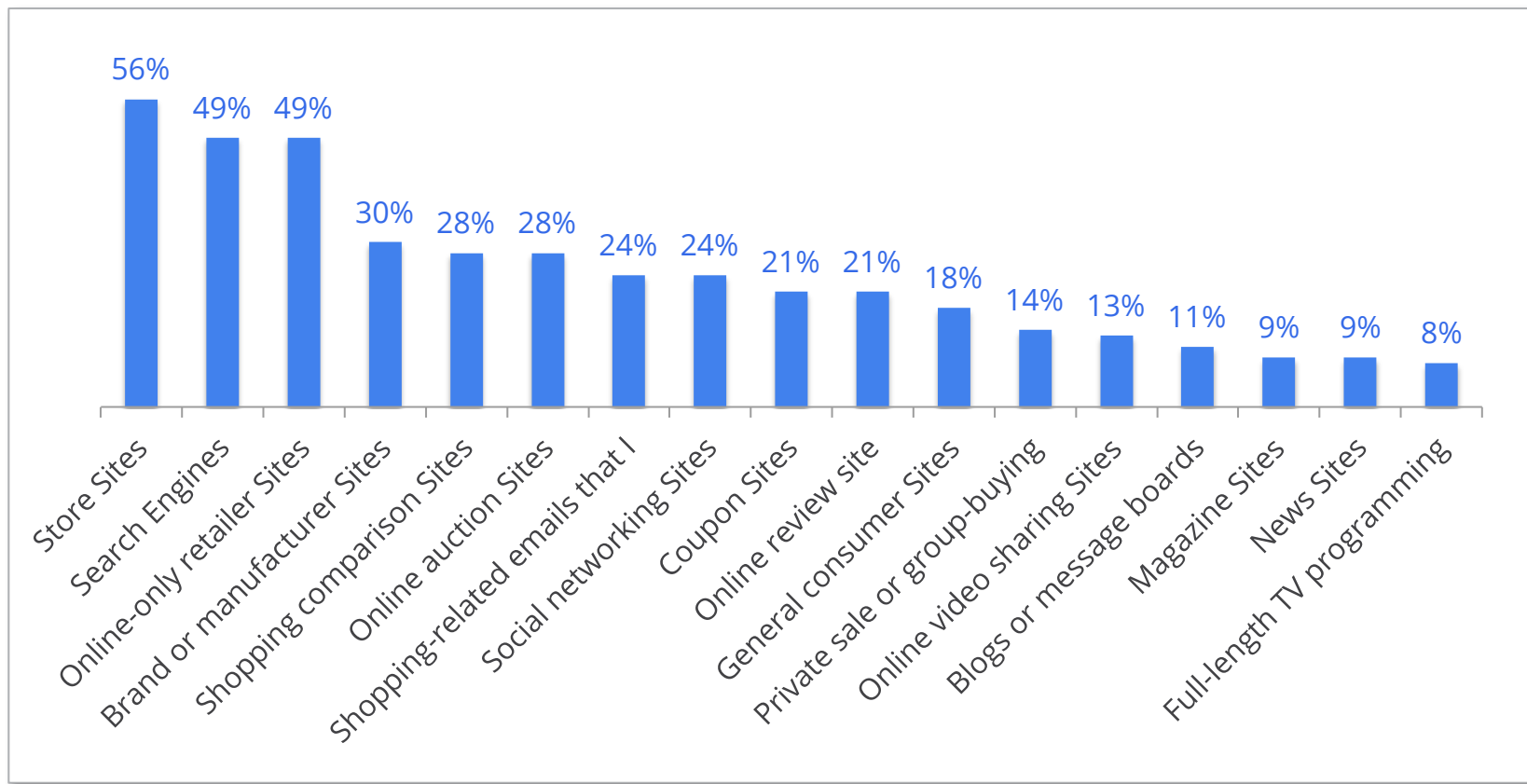
retailer(s) I shop  
38%



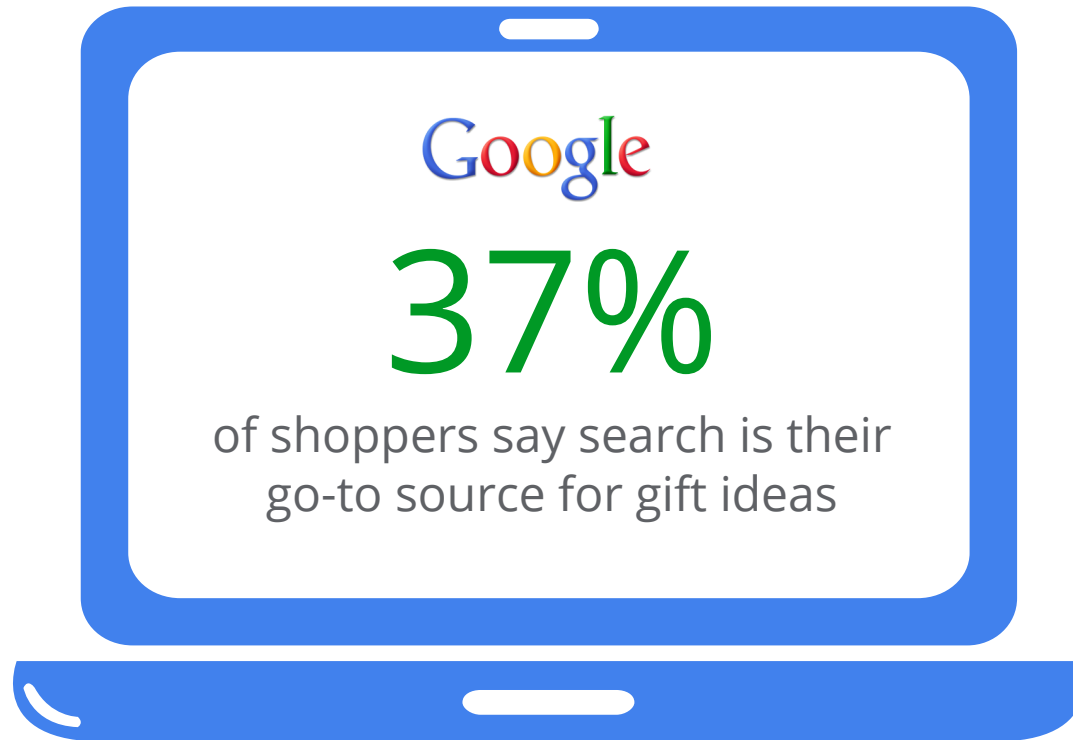
brand(s) I buy  
37%

# Retailer store and online-only retailer sites, along with search, will influence holiday shopping decisions

Online destinations consumers intend to use for holiday shopping this year:



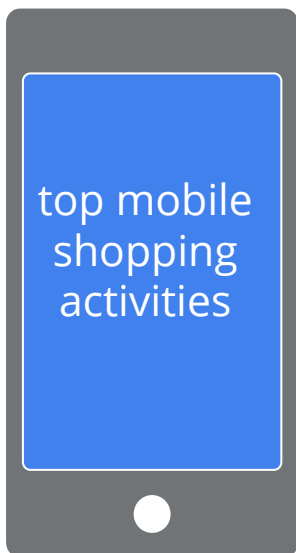
# Undecided shoppers use search for gifting ideas...



# Mobile & tablet will play increasingly important roles in holiday shopping

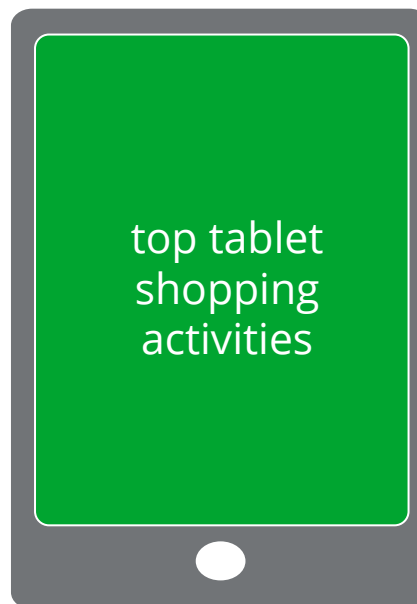
4 in 5 mobile/tablet owners will use the devices to aid in holiday shopping

Base: use a smartphone regularly



- 45% compare prices
- 44% find nearby store based on location
- 39% look for coupons
- 34% read reviews

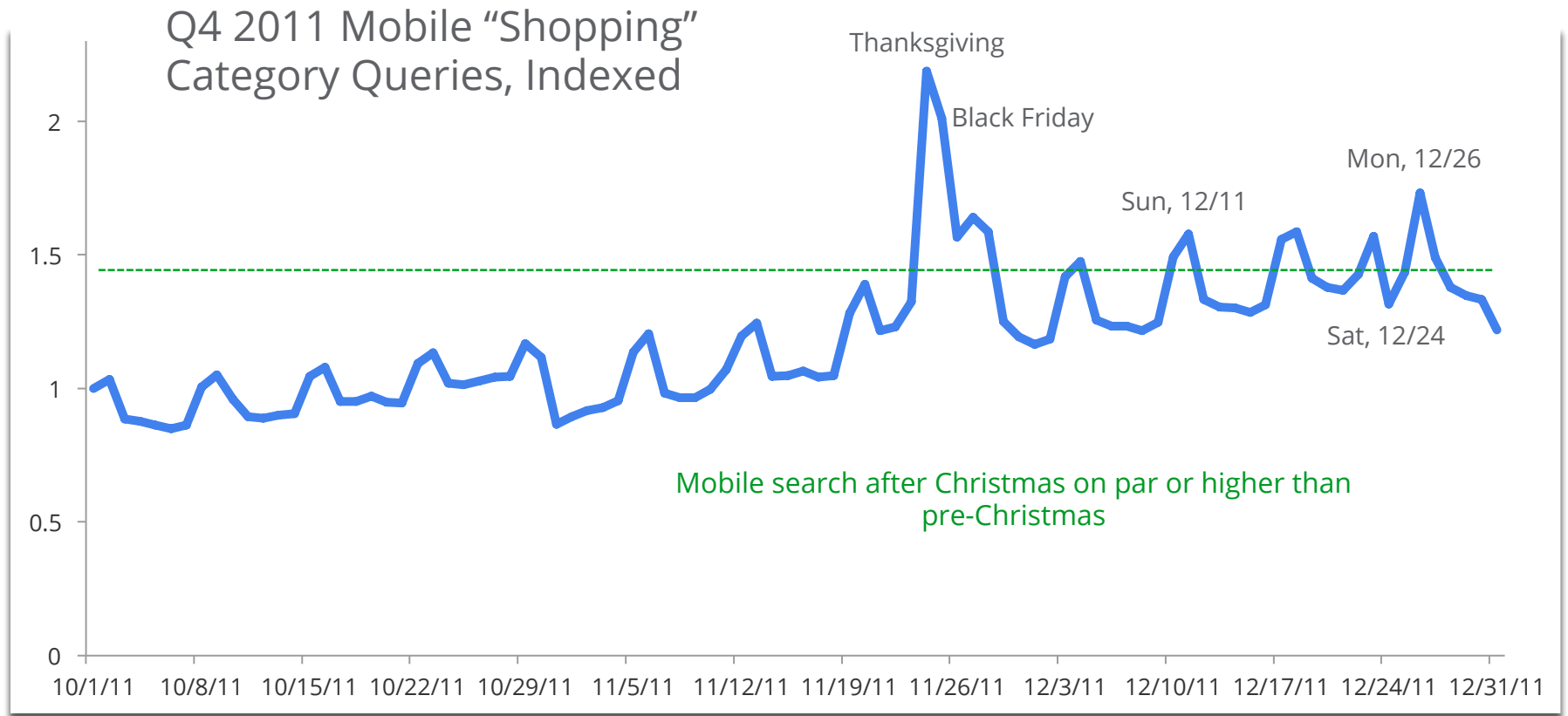
Base: use a tablet regularly



- 56% compare prices
- 48% read reviews
- 46% read product info
- 45% purchase an item

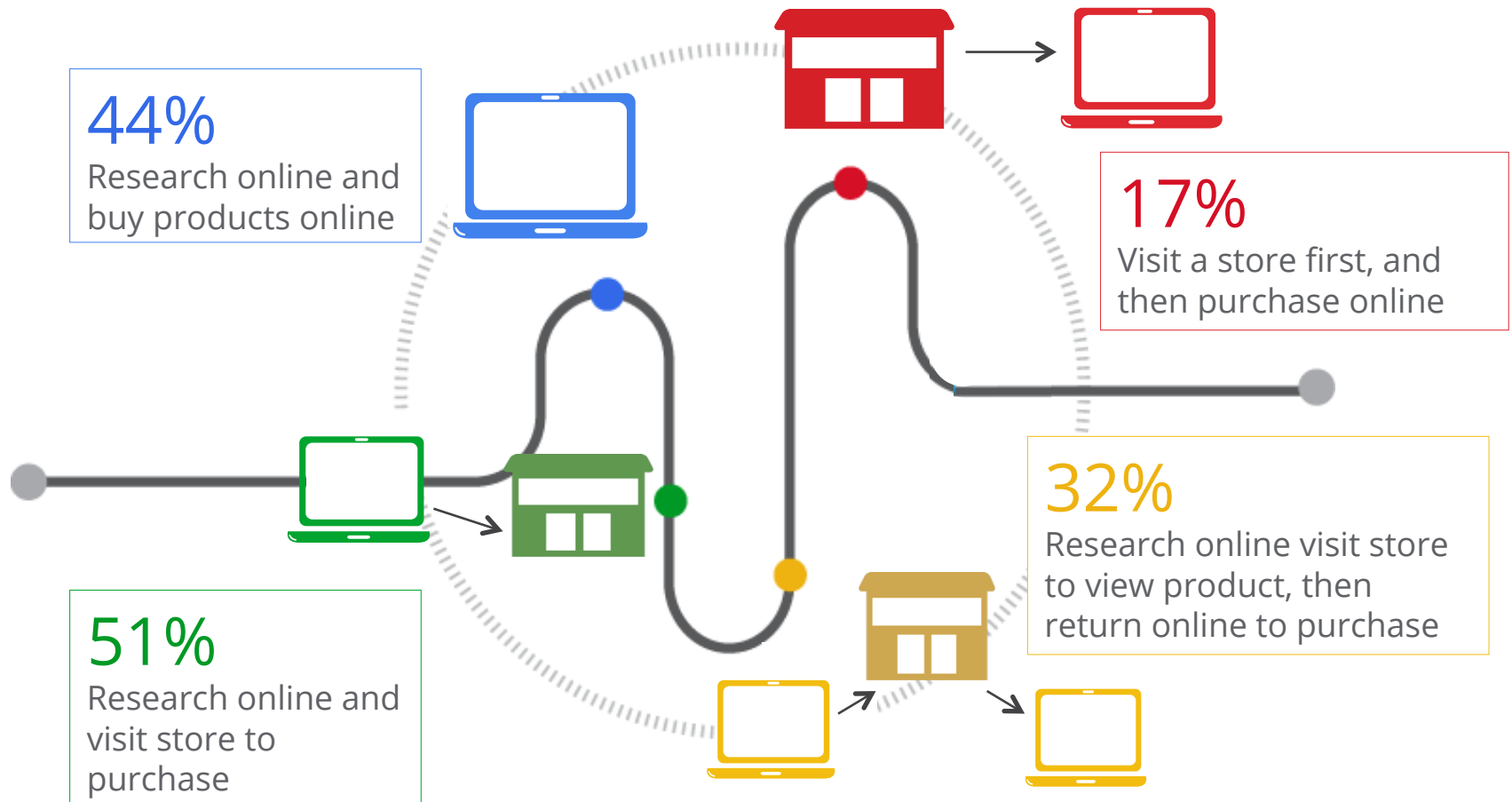


# Mobile devices are constant shopping companions



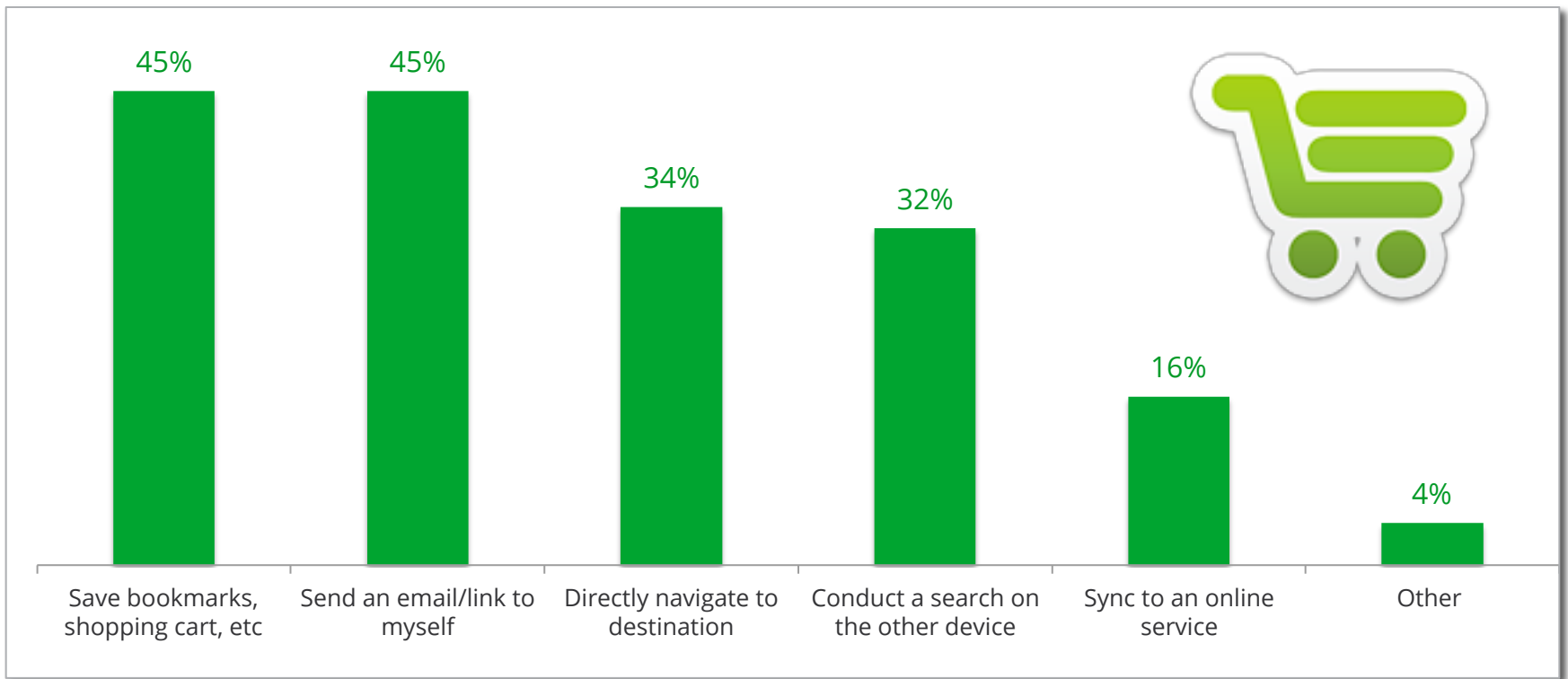
Path to purchase will have many touch points

# Lines between offline and online shopping experiences are blurring

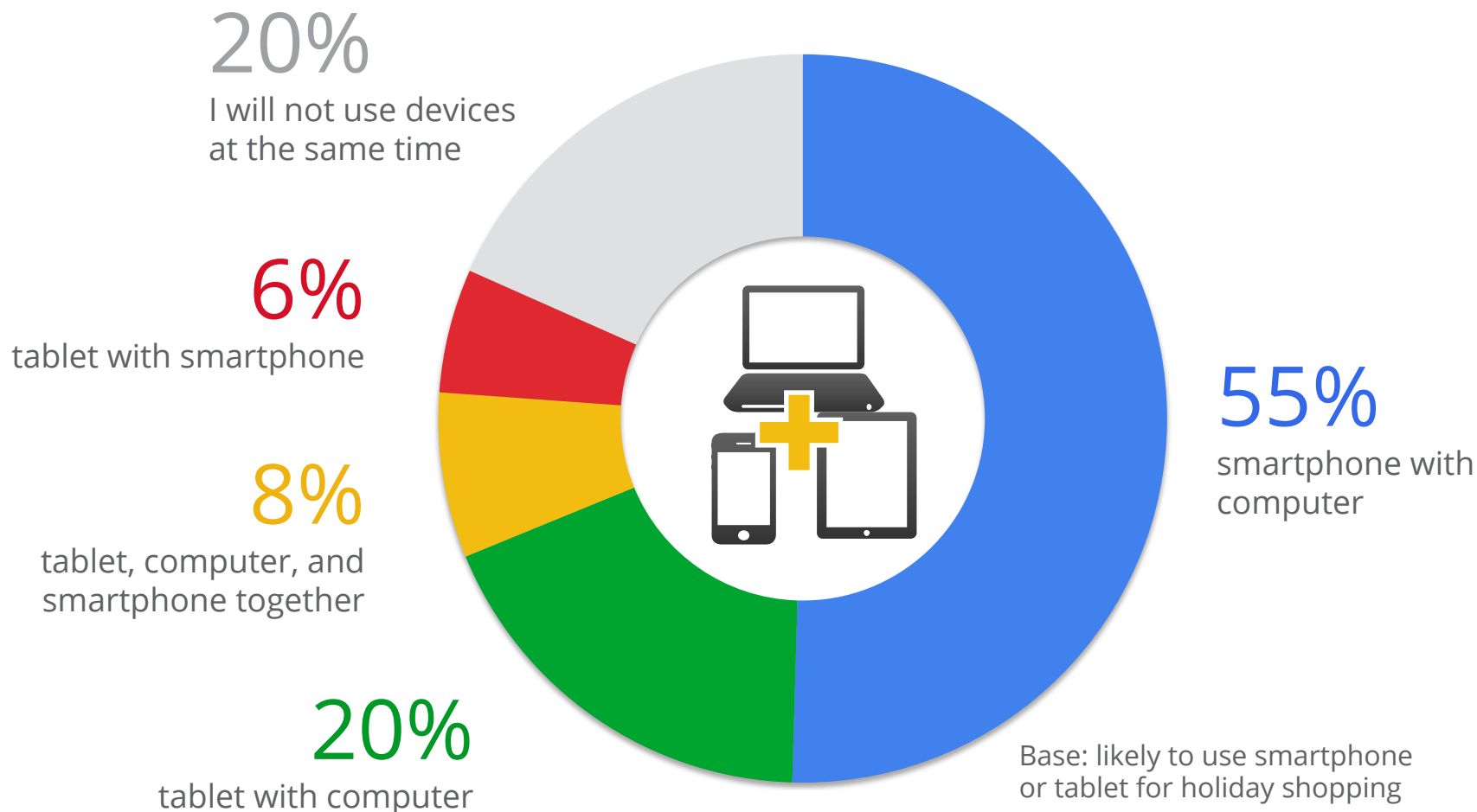


# Most will switch devices while researching, relying on links, search, and shopping cart to pick things back up

85% will shop for a gift by starting on one device and finishing on another; to make this process as seamless as possible, shoppers will do the following: (base- will use more than one device to shop for a gift)

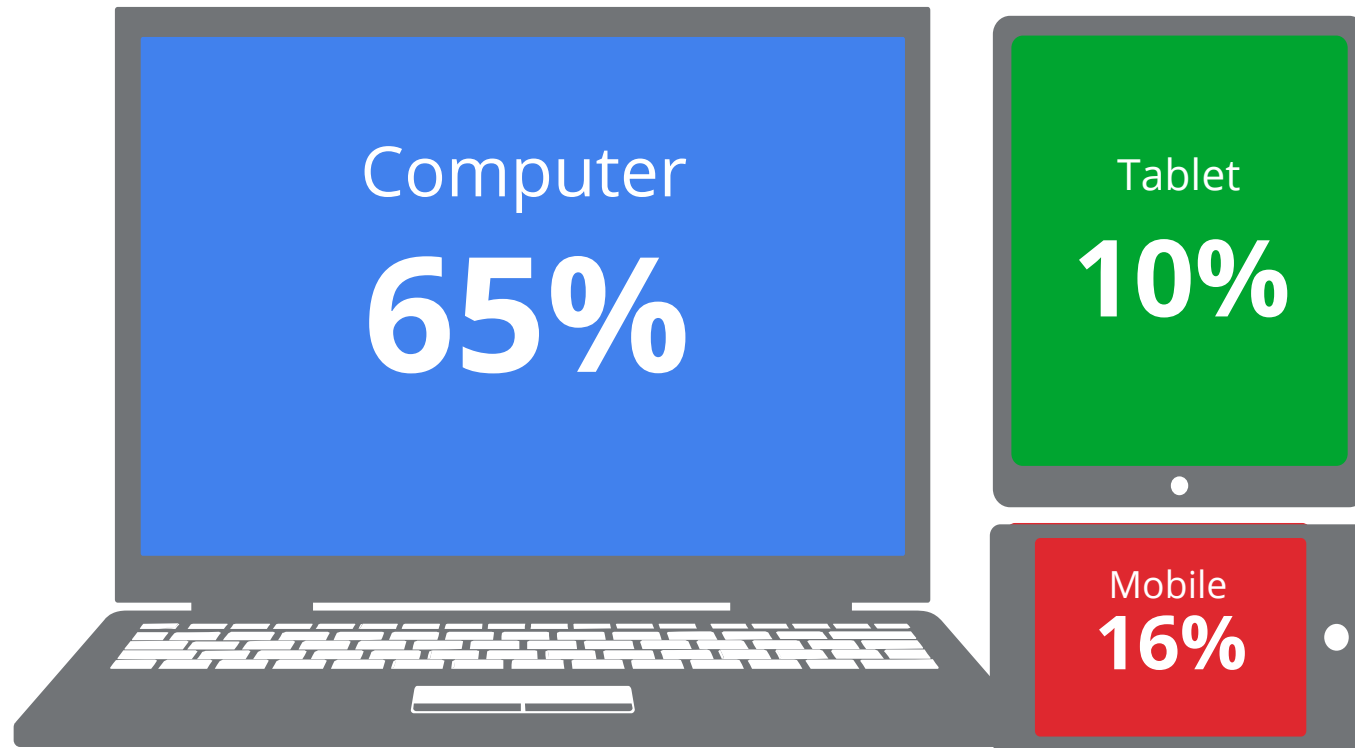


# And 4 in 5 shoppers will use devices simultaneously to help with shopping



# Multi-device owners plan to purchase online across devices

Devices consumers plan to make purchases on:  
( Among those who use a smartphone or tablet regularly)



*8% will purchase from 'other' internet device*

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