Executive Summary

Black Friday is no longer the start of the gifting season. Thirty-nine percent of U.S. consumers said they would start their holiday shopping in October or earlier, contrasting with only 15% who stated that they would wait for the first two weeks of December to shop.1 From 2016 to 2019, October searches for gifting terms across beauty categories have increased in the United Kingdom, France and the United States by 38%, 23% and 10%, respectively.2 Specifically, “fragrance gifts” increased by 81% and 48% in the U.S. and U.K. in the past year alone.

However, consumers’ peak interest in gifting varies by region. Searches for “perfume gift” in the United Kingdom and France spike on Black Friday and Cyber Monday, respectively, while U.S. consumers procrastinate gifting searches until the weekend before Christmas. In the U.S., total monthly online fragrance sales were 1.4 times higher in December 2019 compared to November — a signal that fragrance gifts are often last-minute purchases. Brands should intentionally allocate localized media spend to these regional surges while recognizing that holiday shopping as a whole starts earlier and considering promotions such as two-day shipping to accommodate last-minute shoppers in the United States.

2. Gartner analysis of Google AdWords data

Key Findings

- The holiday season no longer starts on Black Friday. Compared to October 2018, the share of Sephora emails offering holiday specific gifting options in the U.S. and France increased by 1% and 7% year over year, respectively. Gifting search behavior also increased in the United Kingdom, France and the United States by 38%, 23% and 10%, respectively.
- Across regions, both gift sets and enterprise brands win the holidays, accounting for the majority of holiday traffic growth and the largest share of listings on top-ranking holiday category pages.
- In the U.S., skin care gifting is on the rise: fourth-quarter online sales on specialty retailers have grown 8% year over year. Online color cosmetics sales declined, with eye, lip and complexion products seeing 12%, 5% and 1% decreases in online sales year over year during the same period.

Key Recommendations

- **Start Holiday Promotions Earlier:** Brands should consider starting their online holiday promotionality and media campaigns early to complement retail partners and match top brands’ strategies to capture consumer interest earlier.
- **Rethink Holiday Exclusives:** Brands should support existing product sets on U.S. and U.K. retail partners during the holidays rather than invest in holiday exclusives or advent calendars that receive low traffic.
- **Invest in Category Bright Spots:** Multiaxis and skin care brands should prioritize their skin care and complexion assortments through holiday media spend to align with gifting growth opportunities.

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