Executive Summary

The holiday season remains the critical period for brands to rebalance their books in a difficult retail climate. With apparel constituting the single largest category for online shopping during the holiday period, brands and retailers vie for differentiation by promoting their products online and guaranteeing to get gifts to customers by Christmas. Customers are able to purchase nearly every good on marketplaces like Amazon and Walmart, so brands, department stores and specialty retailers need to find ways to stand out and promote their strengths in product differentiation, branding and stores. Despite the shorter holiday season in 2019 than 2018, Black Friday sales grew in comparison, with leaders promoting offers at the right time and using their digital tools to make the case for why they should be a last-minute gift destination for apparel and other categories.

2. Gartner analysis of Rakuten Intelligence data.
3. Ibid.

Key Findings

- Retailers took advantage of the shortened period between Thanksgiving and Christmas to promote fulfillment capabilities and products, with 68% of studied brands updating their homepage headers.
- In December, the average monthly search volume for generic gift keywords on Google climbed 18% higher than 2018, providing prime real estate for brands to surface text ads and drive traffic to their sites.
- Leading specialty retailers are getting smarter about using organic tools like site and social media to direct consumers to physical stores and online gift guides, with 25% of Instagram Stories driving traffic to guided selling tools.

Key Recommendations

- Adjust messaging as you get closer to the holidays to focus on last-minute and low-cost options like buy online, pickup in store (BOPIS).
- Use Google text ads against both broad-based searches like “gifts” and targeted products to drive traffic to your site during key periods.
- Use organic messaging and tools like online gift guides to help drive indecisive shoppers to your site and store.

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