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Black Friday 2020

European Google Shopping benchmarks for five key industries

Google Ads

Black Friday 2020

How did the most hyped season of the year look for Google Shopping?

2020 has been a year of generation-defining disruption – but with major disruption comes both loss and *opportunity*.

For retailers, challenges in the face of offline closures have been substantial, yet a mile-high wave of online consumption has been more than opportune for ecommerce growth. Google Shopping has been **a central marketing channel** for capturing that vital consumer demand, especially during Black Friday.

In recent years, Black Friday has become the simultaneous kickoff and peak of holiday shopping not only in the US, but here in Europe too. So how did this unofficial holiday look in this most unusual year?

In this concise report, I'll provide overall European benchmarks for impressions, costs, and clicks – plus **specific insights for five key industries**:

Fashion & Accessories, Electronics, Home & Garden, Sports & Fitness, and Health & Beauty.

This data is based on more than 500 Shopping accounts (501 to be exact). I will not tackle conversion or revenue here because, at time of writing, that data is not yet fully attributed.

The following information is sourced from anonymized and aggregated client data, which you can view via our interactive Data Studio report at smec Market Observer.

Mike Ryan
Head of Retail Insights

Black Friday countdown in Germany

- **Early** Black Friday **search interest** has **increased** each year relative to the peak interest

- **Distribution** of 2020 **interest** was notably **higher** YoY from 14 to 30 days out

- In 2019 and 2020 there was a **peak in interest one week out**, probably correlated with deal research

- **Week-of volume** was particularly **sustained** in 2020, likely due to more retailers running "Black Week" promos
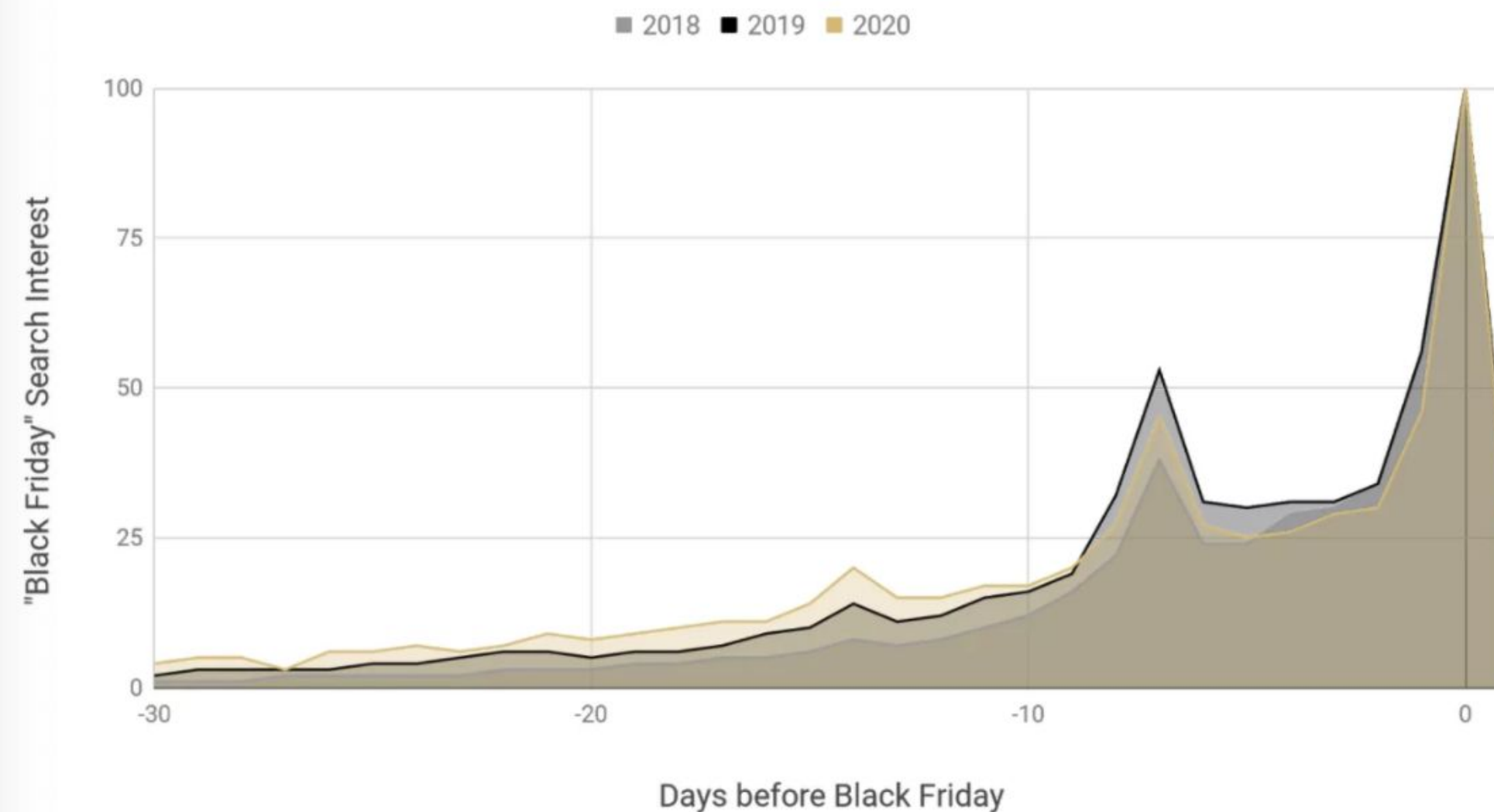
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Countdown to Black Friday (Germany)

■ 2018 ■ 2019 ■ 2020

"Black Friday" Search Interest

Days before Black Friday
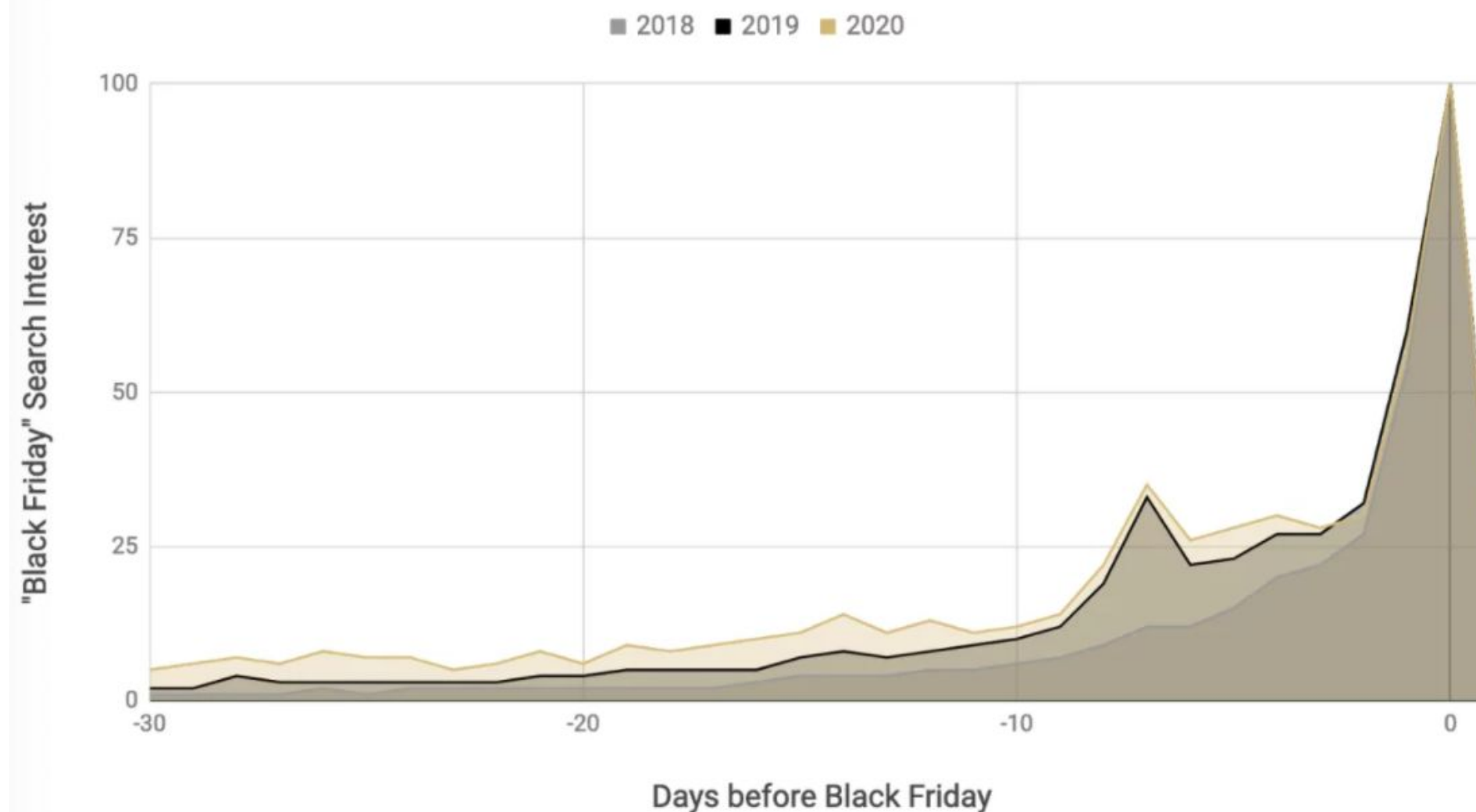
Source: smec Market Observer

Black Friday countdown in United Kingdom

Countdown to Black Friday (United Kingdom)

■ 2018   ■ 2019   ■ 2020

"Black Friday" Search Interest — y-axis: 0, 25, 50, 75, 100
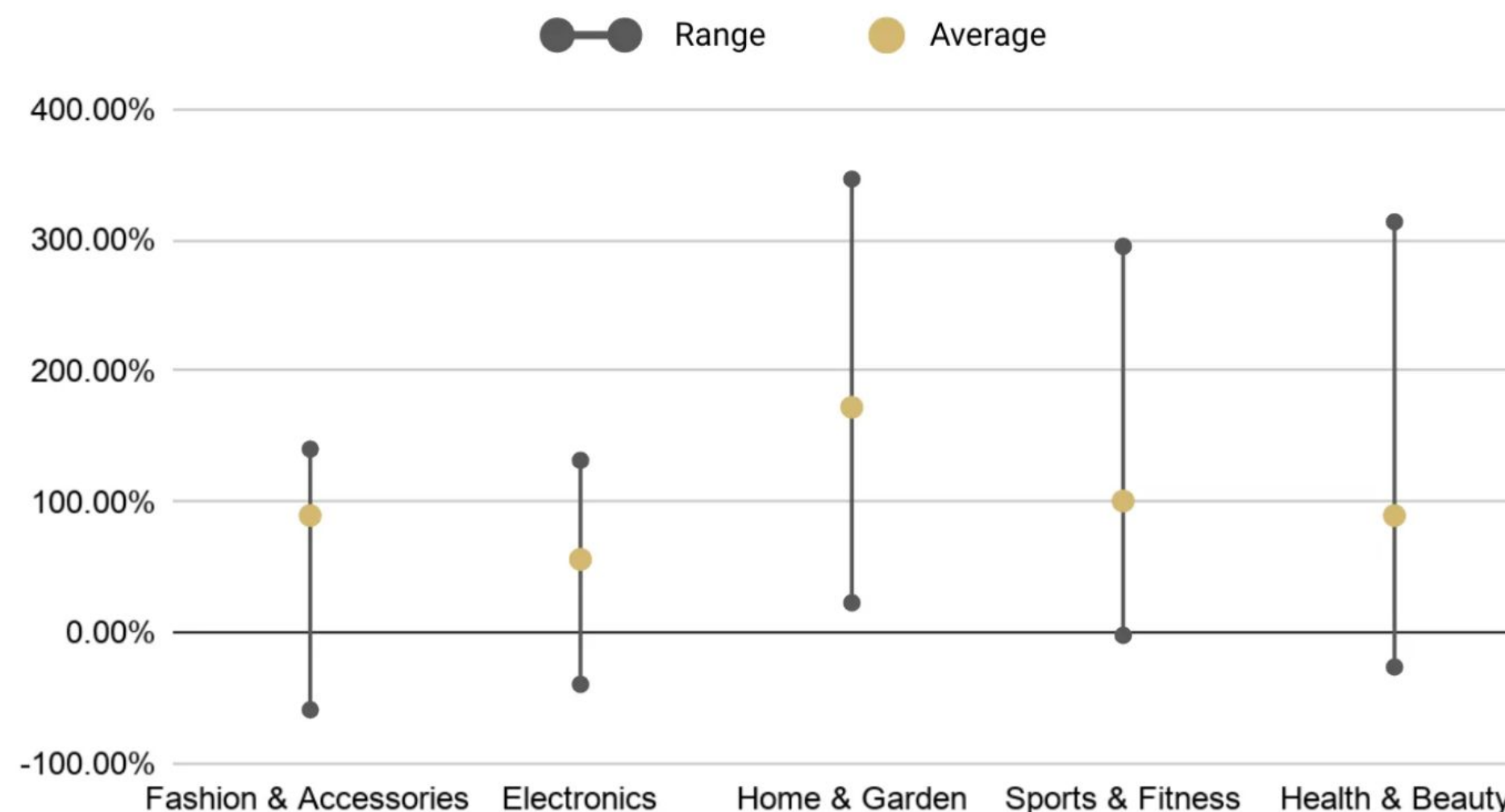
Days before Black Friday — x-axis: -30, -20, -10, 0

Source: smec Market Observer

- **Distribution** of interest has **shifted earlier** relative to the peak

- Unlike Germany, **UK** Black Friday **week-of interest** was **not as significant** as 2019

- A **share of this interest** appears to have **shifted** to an **emerging peak two weeks out**, also visible in 2019

Key industries spent more on Black Friday

- **Ranges were broader for cost** than for other metrics, suggesting a diverse spectrum of budgeting and CPC strategies

- These **five key industries averaged +98% YoY costs**, much higher than the +52% average seen across all industries

- **Home & Garden retailers upped their investment**. Might look more spectacular due to comparably lower historical spend volumes

- **Electronics** saw the **tightest range and lowest average**

Black Friday Costs per Industry, Year-over-Year

Range ●▬● ● Average

400.00%

300.00%

200.00%

100.00%

0.00%

-100.00%

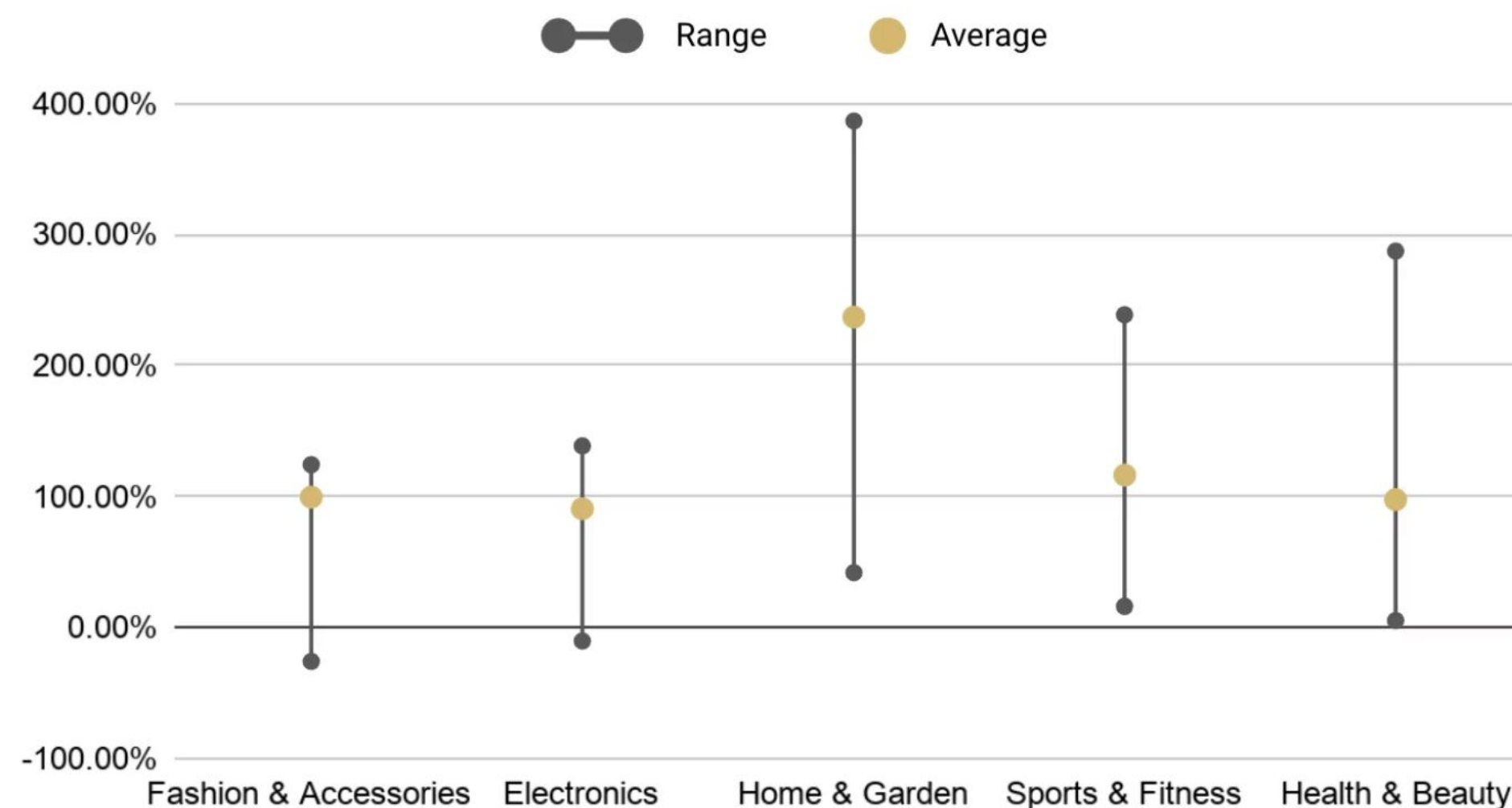Fashion & Accessories   Electronics   Home & Garden   Sports & Fitness   Health & Beauty

Source: smec Market Observer

Home & Garden had a breakout year for Black Friday Shopping impressions
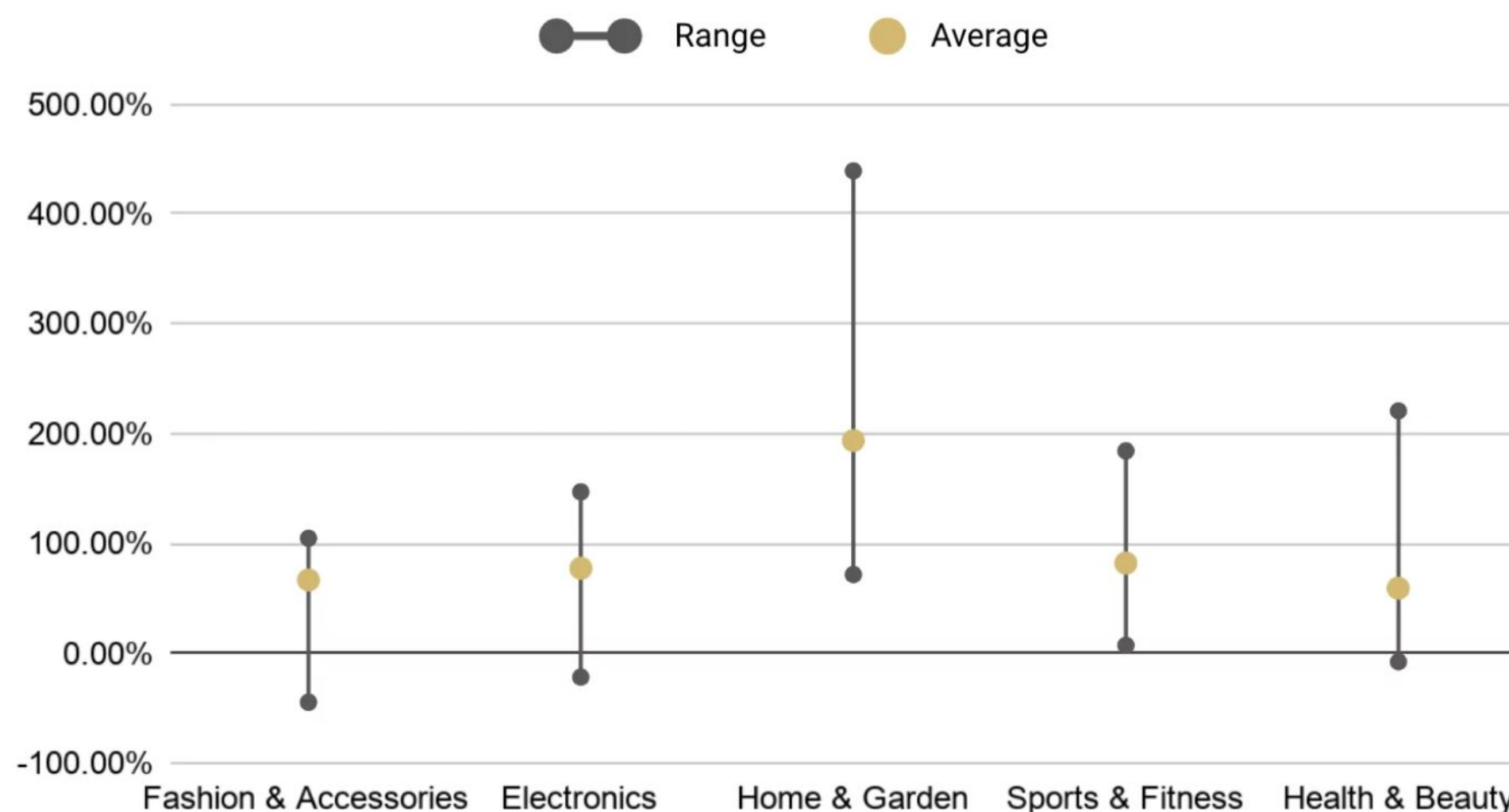

Black Friday Impressions per Industry, Year-over-Year

Range   Average

400.00%
300.00%
200.00%
100.00%
0.00%
-100.00%

Fashion & Accessories   Electronics   Home & Garden   Sports & Fitness   Health & Beauty

Source: smec Market Observer

- **Star Home & Garden** products included **space heaters** and even outdoor seating

- **Fashion** averaged close to the top of their range at **double last year's volume**, suggesting it was quite unusual to have flat visibility

- **Health & Beauty reached a similar average as Fashion**, but with a much **taller range**. Some strong upward outliers pursued reach strategies via aggressive CPCs

How clicks performed during Black Friday

- **Sport & Fitness and Health & Beauty** both have dramatically **lower click ranges than cost ranges**, as well as averages weighted toward the lower bound, suggesting that the biggest spenders might have overextended their CPCs

- **Electronics and Fashion** – Black Friday mainstays – had comparably **wide ranges and similar averages**. Electronics however has **slightly more centered average**, suggesting a more even distribution

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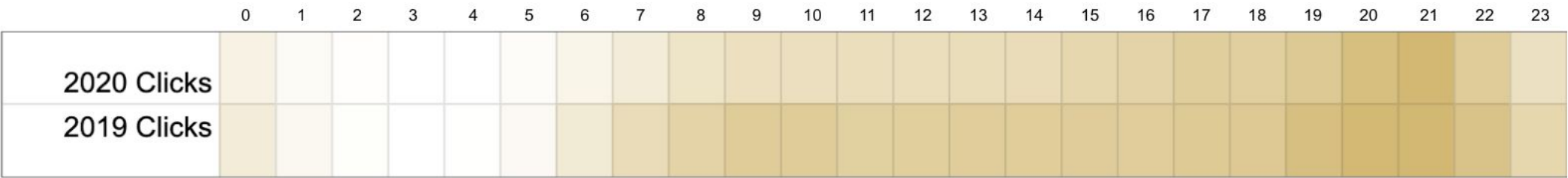Black Friday Clicks per Industry, Year-over-Year

Range   Average

500.00%
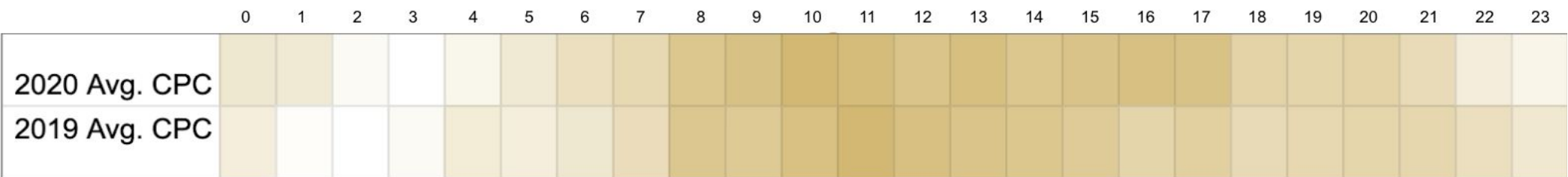400.00%
300.00%
200.00%
100.00%
0.00%
-100.00%

Fashion & Accessories   Electronics   Home & Garden   Sports & Fitness   Health & Beauty

Source: smec Market Observer

Hourly CPC and click development – all industries

Black Friday Clicks per Hour, 2020 vs. 2019

2020 Clicks
2019 Clicks

Black Friday Avg. CPC per Hour, 2020 vs. 2019

2020 Avg. CPC
2019 Avg. CPC

Source: smec Market Observer

- **Click volume** again **peaked** in the **late evening** hours – even more concentrated around 9pm than last year. I would have expected a broader click distribution since fewer shoppers were out at stores during the day

- While 2019 saw **CPCs ramp till 11am** and then **gradually cool down**, in 2020 we saw a faster peak at 10am that was sustained throughout the daytime hours

Who we are

smec – Smarter Ecommerce is one of the leading B2B SaaS providers of paid search automation software and a strategic growth partner for online retailers in Europe.

We are growing fast – in the meantime more than 150 passionate employees from 20 different countries are following their professional passion at one of our locations in Linz, Vienna and London.
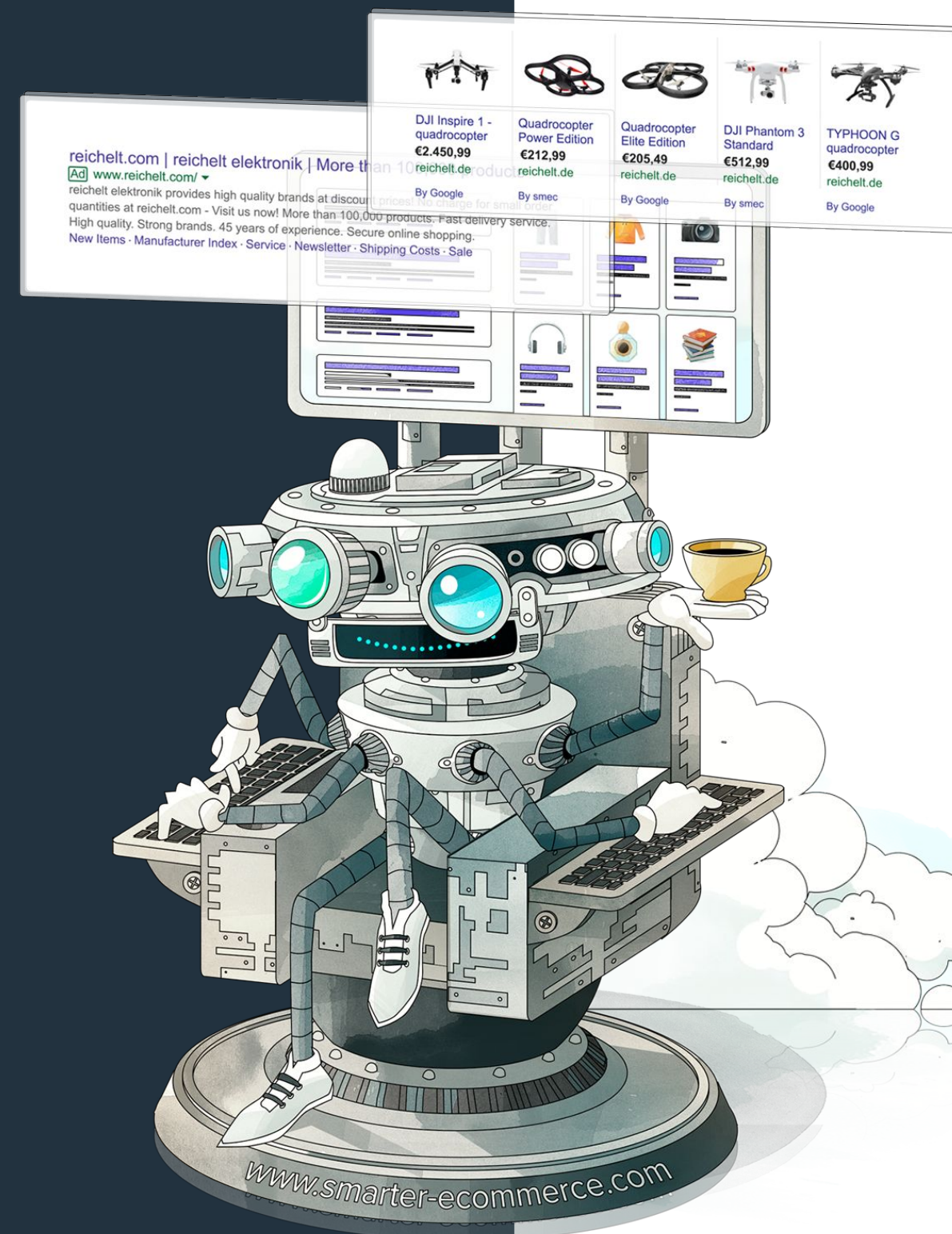
More than 500 national and international clients with yearly budgets worth 350+m Euro rely on our data-driven insights and best-in-class consulting services regarding Data & Growth Strategy, the Google Marketing Platform (GMP), Microsoft Advertising, Programmatic, Display Ads and more.

Leveraging these advantages, we are building a powerful online retail data platform and are transforming from a pure PPC specialist to a strategic growth partner for online retailers.

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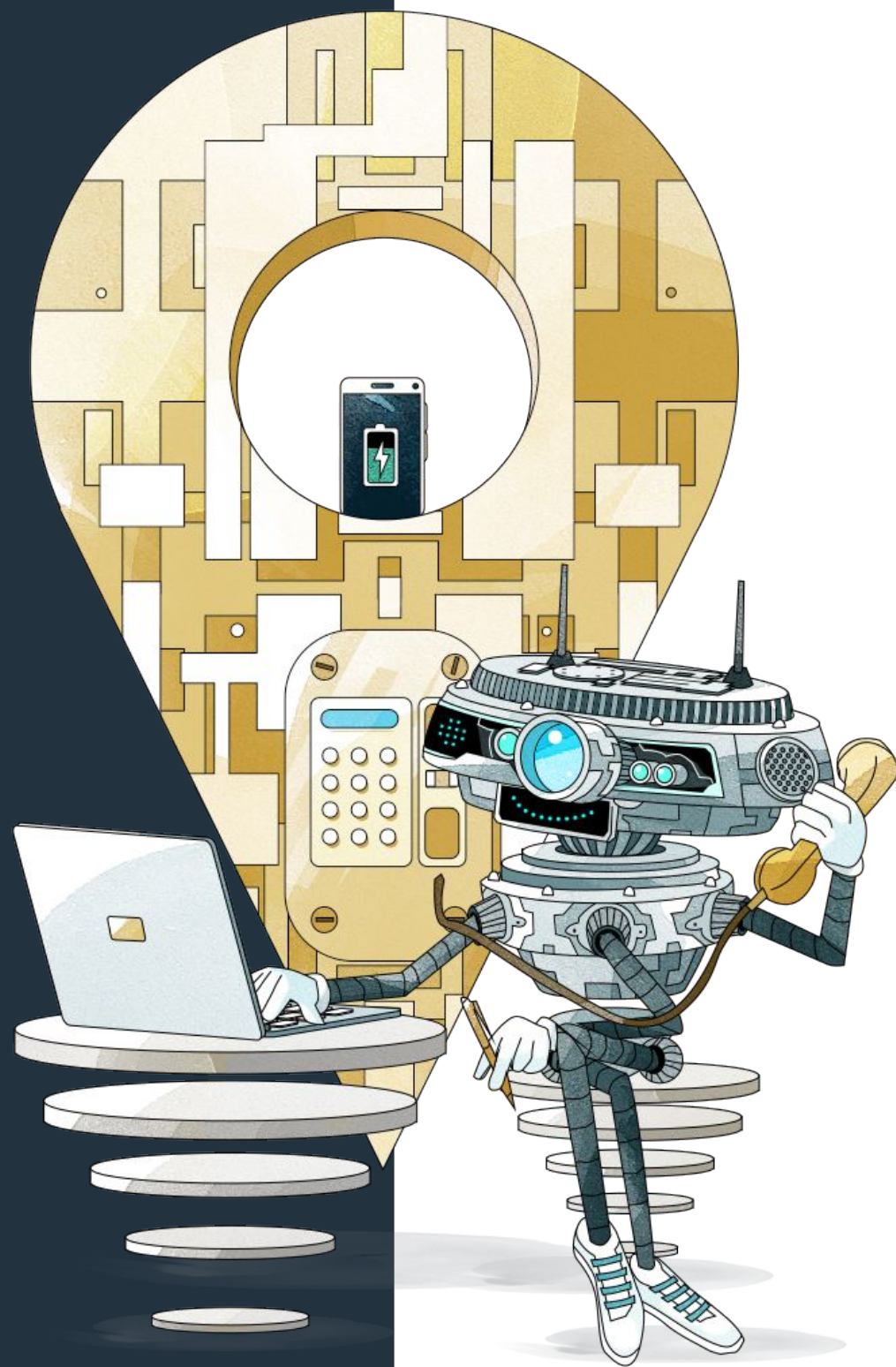
If you have any questions feel free to contact us:

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