



Google Insights to Turbocharge Your 2025 Marketing

August 2025

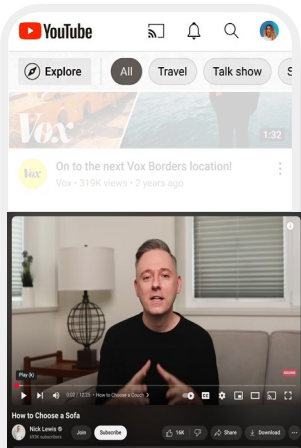


Shea
Browning

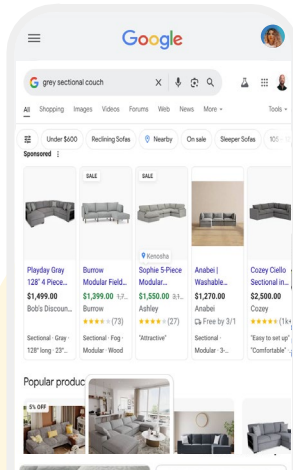


Josh
Banfield

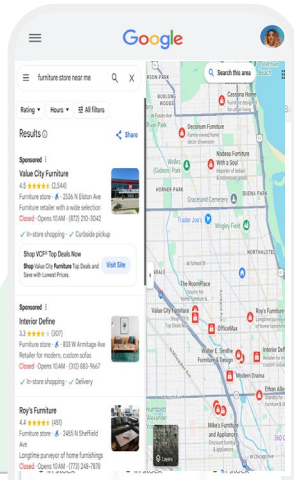
The Customer Journey: Inspiration, research, purchase



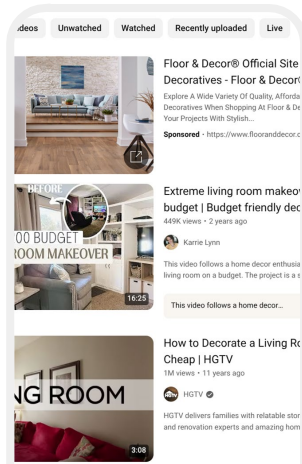
Watch and learn



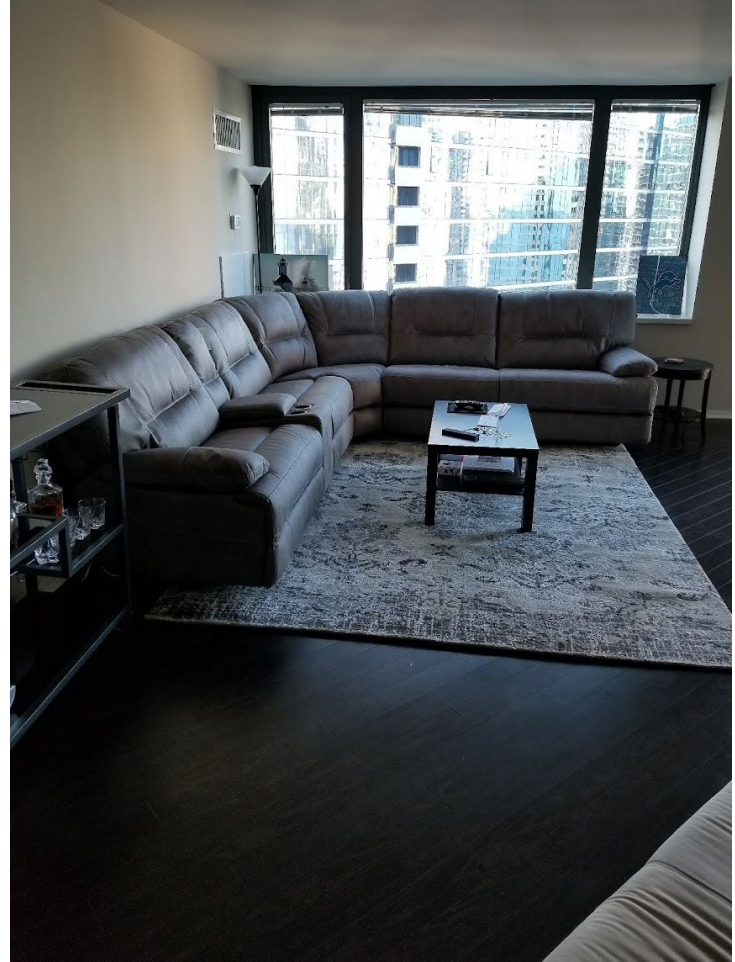
Search, explore



Find, purchase



See and engage



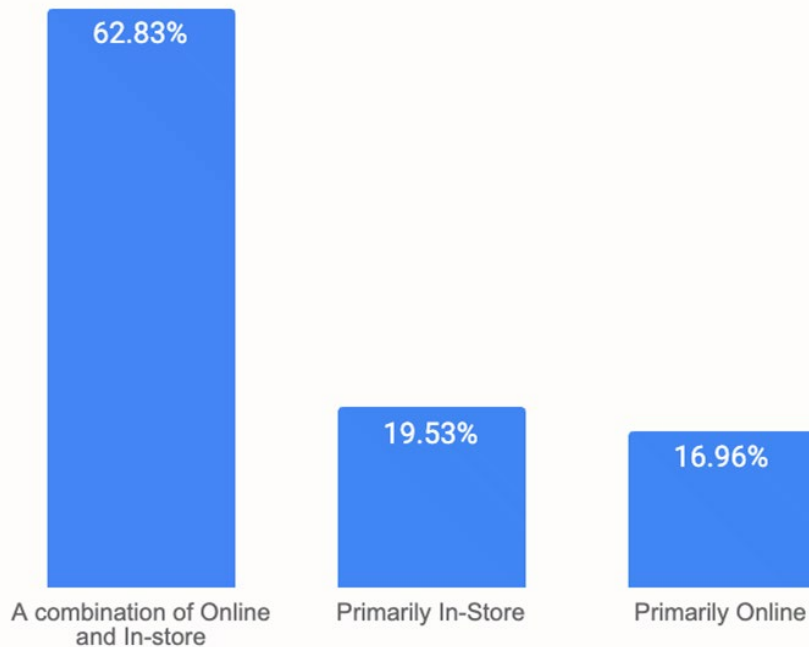
Shoppers narrow consideration set **before the door swings open**



Consumers move fluidly between online and in-store shopping: **63%** of shoppers prefer an omnichannel experience

Q:

How do you primarily plan to shop for Home Furniture this Holiday/Winter season 2025?



Among users of search and/or video, **Google** and **YouTube** are leading media channels used to research

Google

90%

YouTube

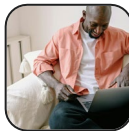
51%

Today's consumer
is **seamlessly** and
simultaneously
moving across
4 key behaviors

Searching



Scrolling



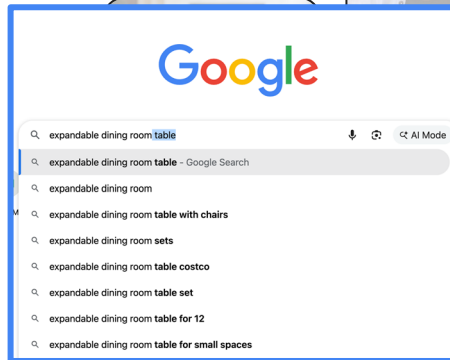
Shopping



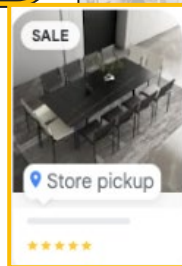
Streaming

The consumer journey

Searching



Shopping

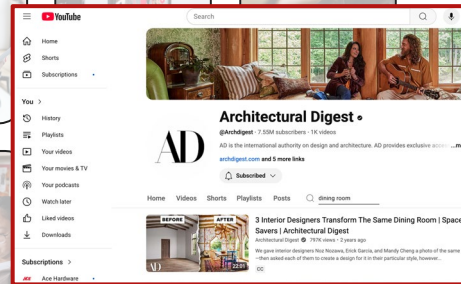


Proprietary + Confidential

Scrolling



Streaming



What we will discuss today

01

Market Pulse

02

2025 Home Furniture Highlights

03

Consumer Deep Dive: Price Sensitivity

04

Q4 Lookahead: Holiday 2025

05

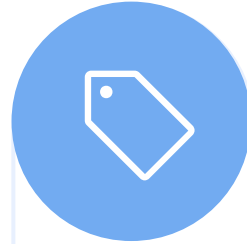
Focus On: Labor Day 2025

06

Google Tools

01

Market Pulse



3

Early Reads on 2H2025

Positive Signs - *But Still Be Cautious*

Economic

Positive economic signals persist despite declining consumer sentiment, a shift to essentials, and a drop in spending from lower -income households

Sensitive Shoppers, Longer Season

Consumer

Price -sensitive shoppers are front -loading the holiday season, researching heavily and exploring second -hand options

Historical Patterns Show Opportunity

Seasonality

Early signals and historical demand trends suggest the furniture category will grow through EOY 2025

Furniture sales will grow Y/Y during 2H 2025 - but winning your share depends on communicating value, strong content & competitive prices.



Demand is out there

88%

of Labor day Furniture Shoppers plan to spend “as much” or “more” in 2025 than they did during Labor Day 2024.



Shopping is truly multi-channel

+14%

increase in YouTube views for Home Furniture -related content in 2025.

Consumers want more in -depth & interactive content as they style their homes. Showing up well will help get them into your stores.



Furniture shoppers are **price -conscious**

67%

of furniture shoppers report **price as the most important factor** for their purchase decision, a 31% increase from Feb 2025.



More items on discount

27% of products
offer a deal or promotion

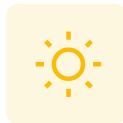
vs. 22% in 2024



BNPL on the rise

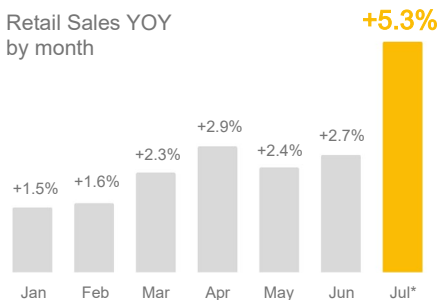
+33% YOY
using BNPL for Prime Day

\$2B
in Prime Day BNPL sales



July retail sales were HOT

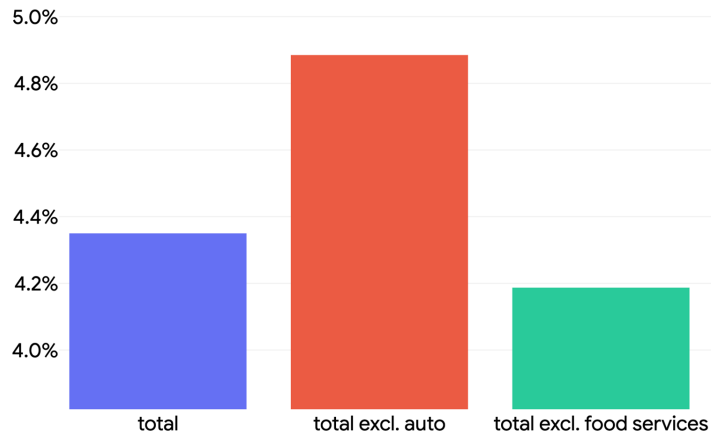
Retail Sales YOY
by month



*data is thru latest available, July 19

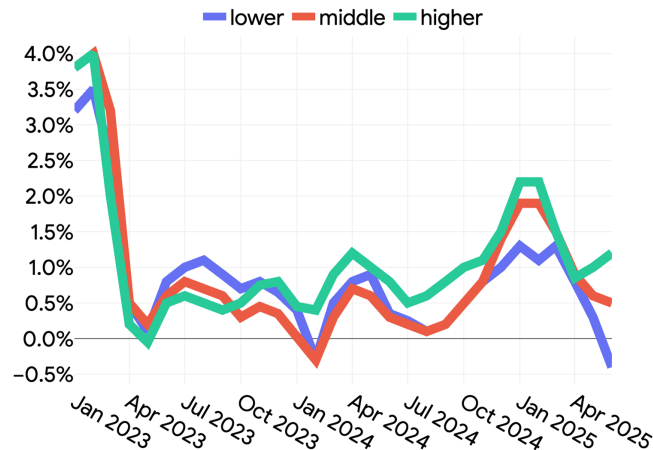
Economic Pulse Check: Consumers are favoring lower -priced items - but there's opportunity among higher -income households.

Discerning Glimpse into Retail



The weakness in big-ticket items like vehicles indicates that consumers may be favoring **affordable experiences over durable goods**, often a signal of caution or saturation.

Income Spending Divide

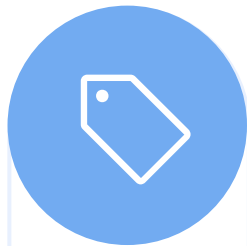


Card spending growth among **lower -income households has turned negative** – the first drop in over a year. In contrast, spending by middle & higher-income groups **remains resilient**

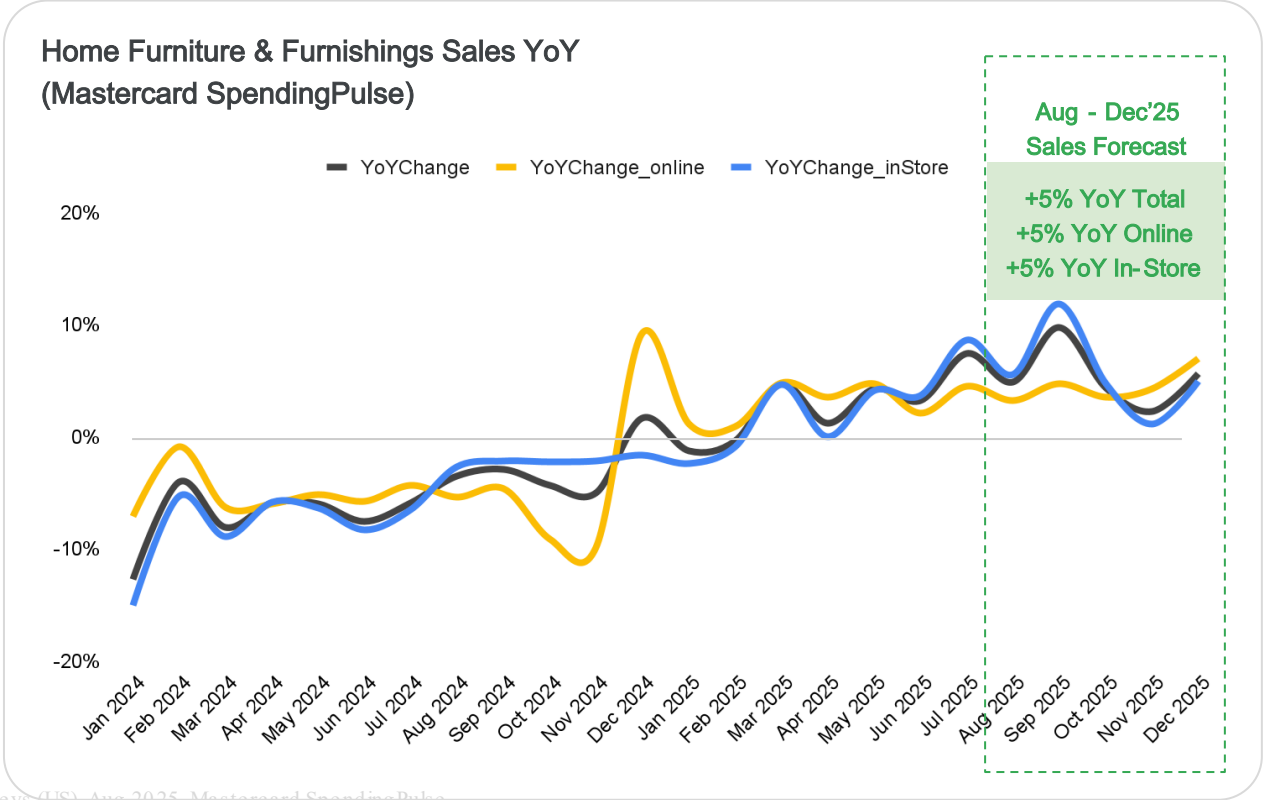
02

H1 2025:

Home Furniture
Highlights



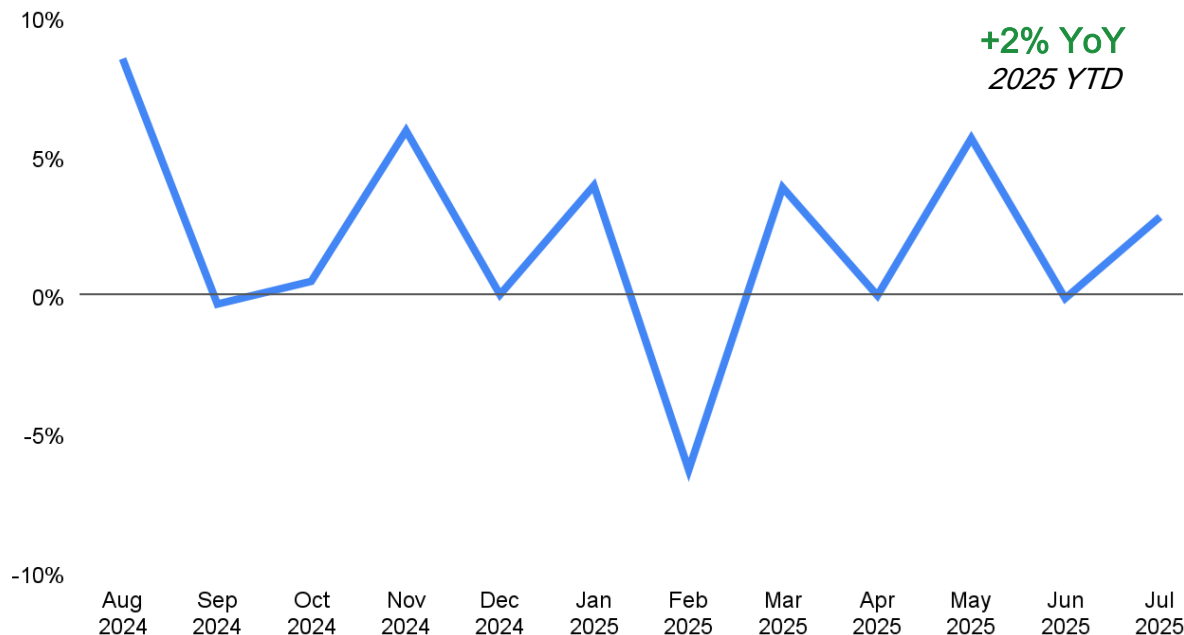
YoY growth of Home Furniture sales has been steadily improving in 2025, forecasting to grow +5% across both online and in-store channels



Source: Google Consumer Surveys (US), Aug 2025, Mastercard SpendingPulse.

Home Furniture foot traffic has grown at +2% YoY in 2025 YTD as consumers value the in-person experience

Placer.ai Foot Traffic for Home Furniture
Last 12 months



Source: Placer.ai

RETAIL DIVE Sign up

DIVE BRIEF

Ashley's new Las Vegas store is its largest in North America

The location boasts an 88,000-square-foot showroom and a 218,000 square-foot warehouse, and is meant to be a community hub.

Published June 12, 2025

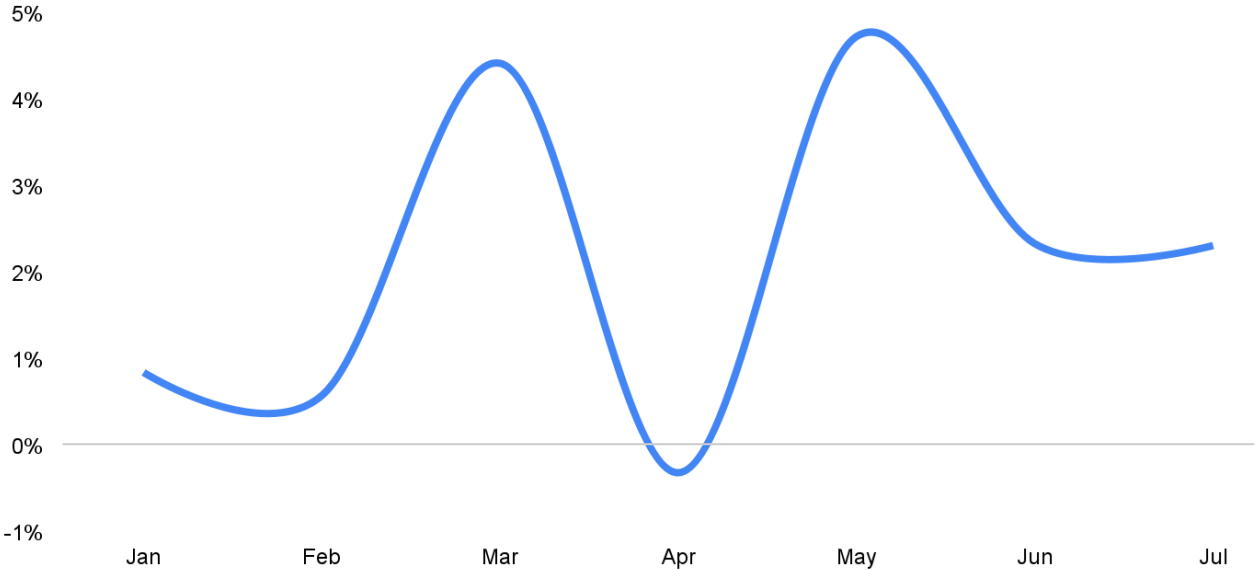
ModernRetail SUBSCRIBE LOGIN

STORE OF THE FUTURE // MAY 20, 2025

Inside the growth strategy of Bob's Discount Furniture as it approaches 200 stores, with 20 openings planned in 2025

2025 YTD Home Furniture category clicks are up vs 3LY average at +2%

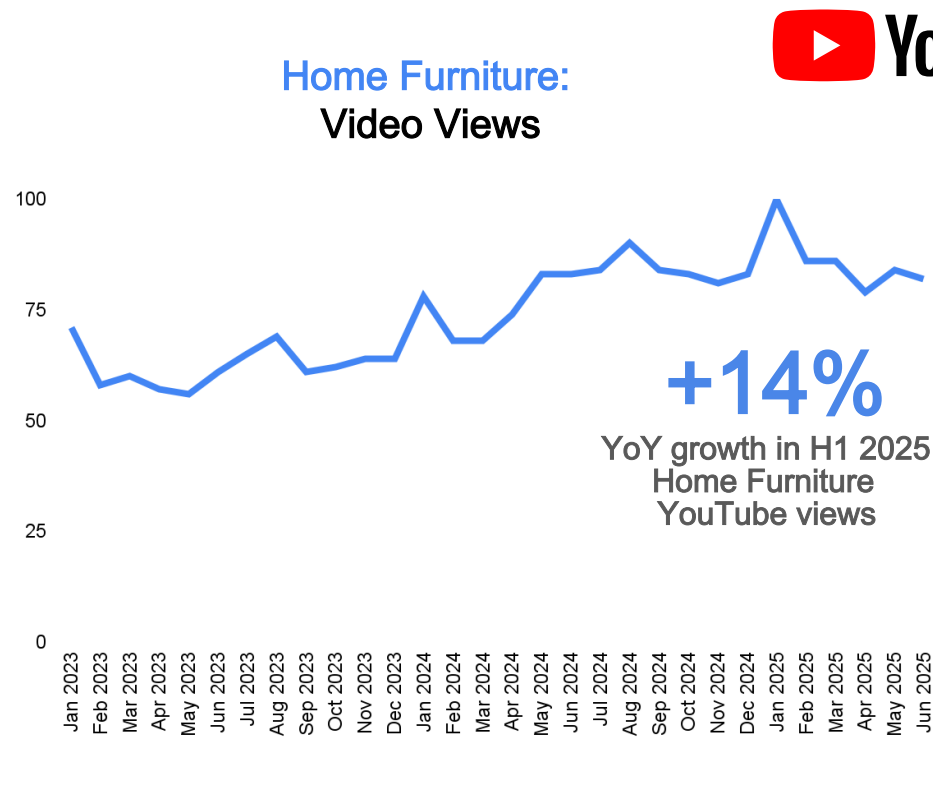
Home Furniture Category Clicks YoY
2025 YTD vs 3LY Average



+2%

Growth of 2025 YTD vs
2022-24 average Home
Furniture clicks on search
ads across brand and non-
brand

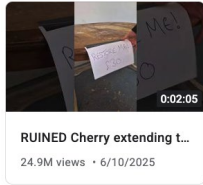
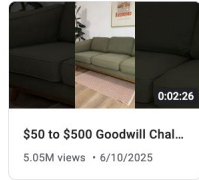
YouTube views of Home Furniture content sees sustained growth, with home tours and furniture restoration among trending content



Home Furniture:
Top Creators and Their Most Viewed Videos



Logan
110K subscribers
31M views



Upcycle Furniture Finds
110K subscribers
45M views



Homeworthy
650K subscribers
210M views



Furniture Shoppers meet their needs on YouTube by...



69%

Of Furniture OLV shoppers found YouTube Shorts helpful for discovering new brands/products

97%

Of Furniture YouTube shoppers said longer form YouTube videos are very or somewhat important for comparing different products/brands



Platforms like YouTube help shoppers view the opinion & experiences of others if they can't judge the product themselves



“

*"I feel as though YouTube is the "gatekeeper" because I have had excellent past experiences finding **unbiased videos** offering "consumer protection" type information (both good, and bad) which have helped me make informed decisions before I decided to either make or not make purchases."*

-Stephen, Furniture ”



What is the top Google Search
Demand trend for **home**
aesthetics over the past 3 months?

- a.) Curved Furniture
- b.) Antique/Vintage
- c.) Minimal
- d.) Coastal

A pair of hands is holding a white tablet. The tablet screen displays the text "TRIVIA TIME" in a large, bold, blue, sans-serif font. The background of the screen is white. The hands are positioned on the left and right sides of the tablet, with the thumbs visible at the bottom corners.

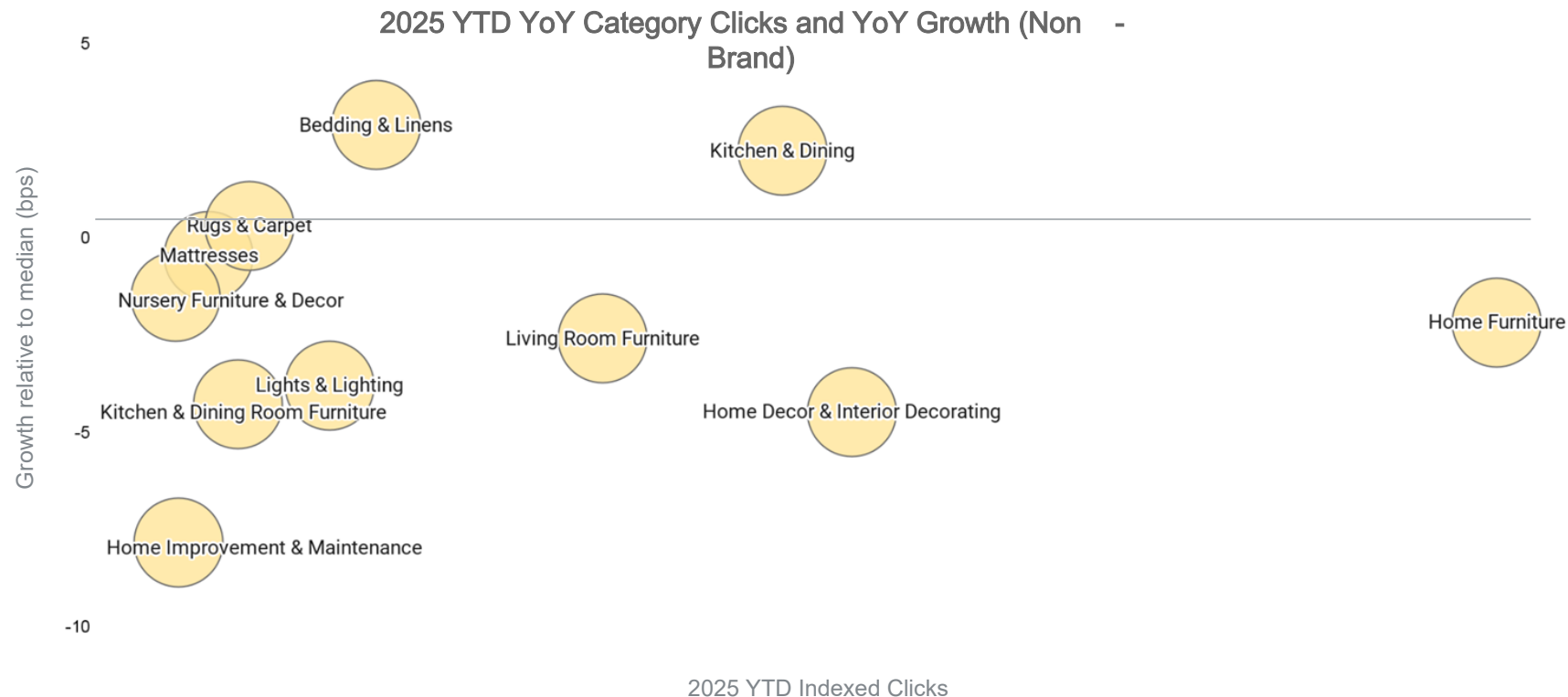
TRIVIA TIME

What is the top Google Search Demand trend for **home aesthetics** over the past 3 months?

- a.) Curved Furniture
- b.) Antique/Vintage
- c.) Minimal
- d.) **Coastal**



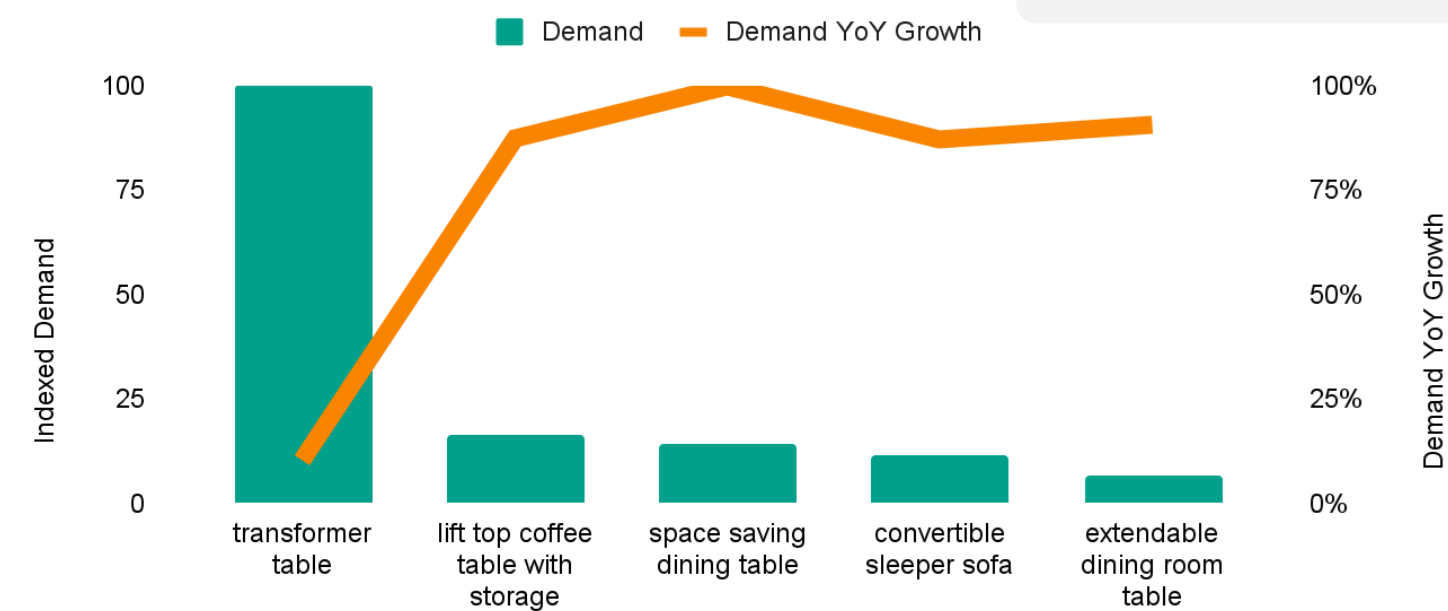
Google Search clicks 2025 YTD for Home Categories



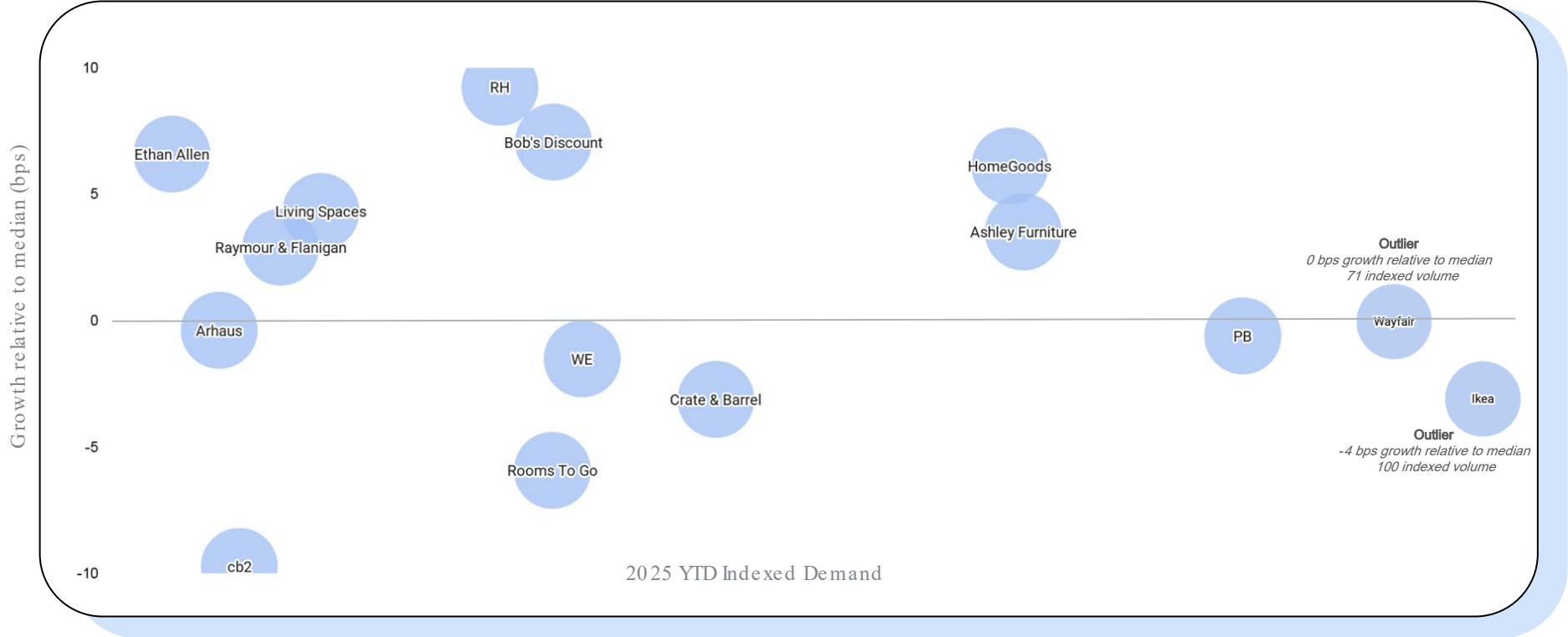
As consumers gear up to host, **multifunctional furniture pieces** allow them to make the most of their space.

Rising Home Furniture Terms
2025 YTD

Making Every Square Foot Count:
Multifunctional furniture is seeing a rise in popularity, as consumers look for smart designs that allow them to host and entertain



Google Search Demand 2025 YTD: Home Furniture Brands



2025 YTD Top Growing Terms YoY for Home Furniture Brands

2025 YTD Top Growing Brand Terms YoY :

ashley furniture clearance +607%

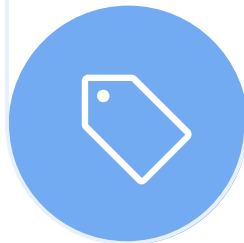
pottery barn sale +156%

bob's furniture locations +103%

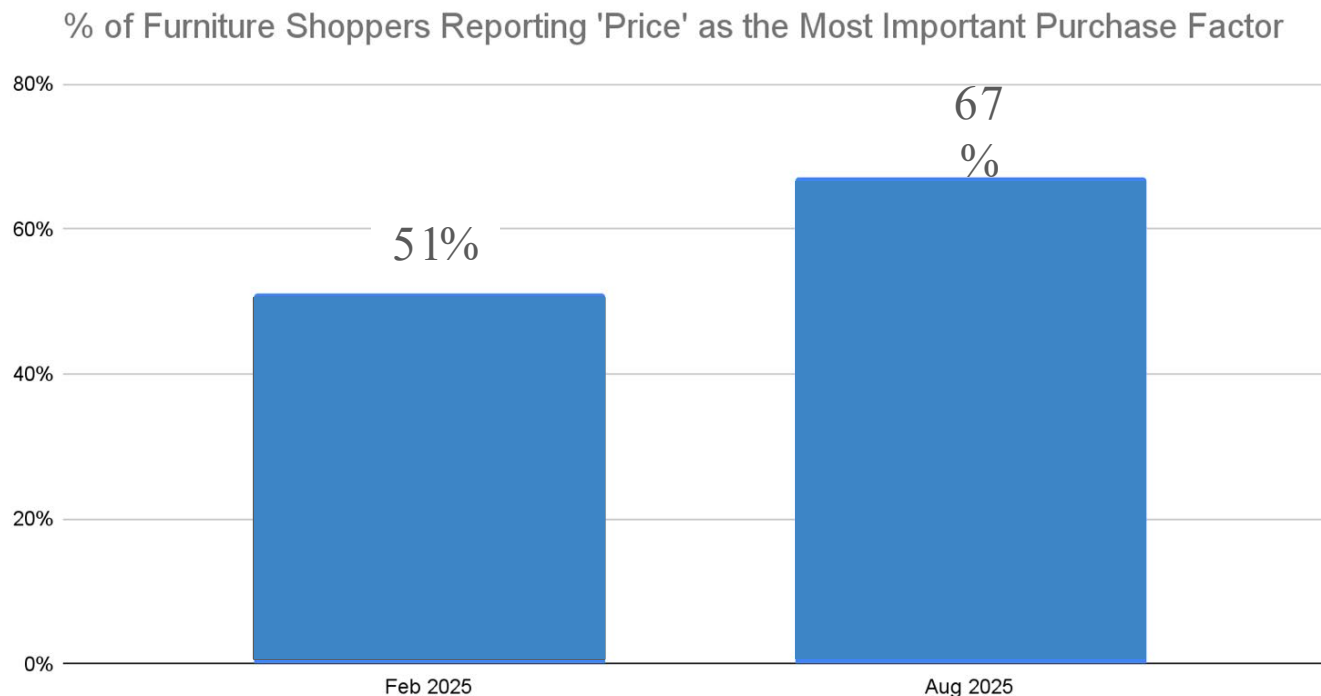
wayfair promo code +43%

03

Deep Dive: Price Sensitivity

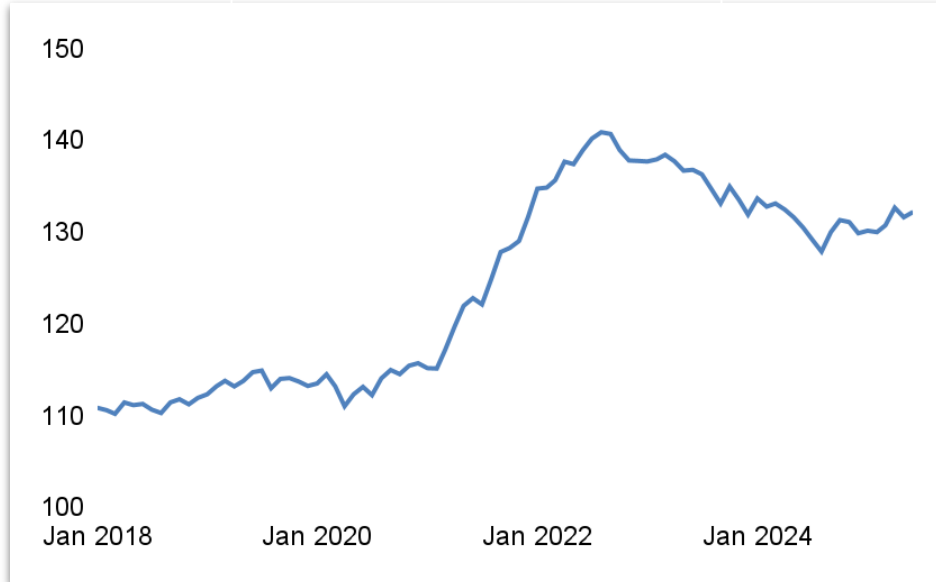


Current macroeconomic uncertainty has made furniture & decor purchasers increasingly more price-conscious.

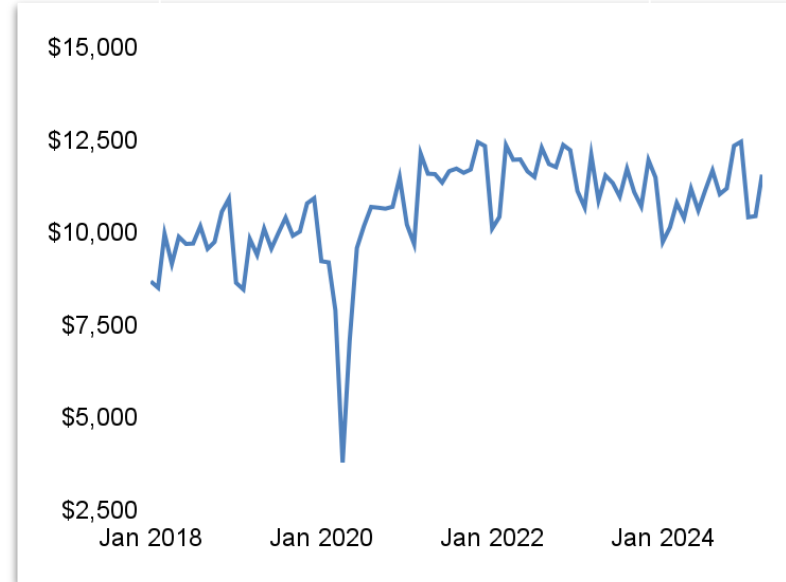


After years of rising prices, consumer demand for furniture is increasingly variable.

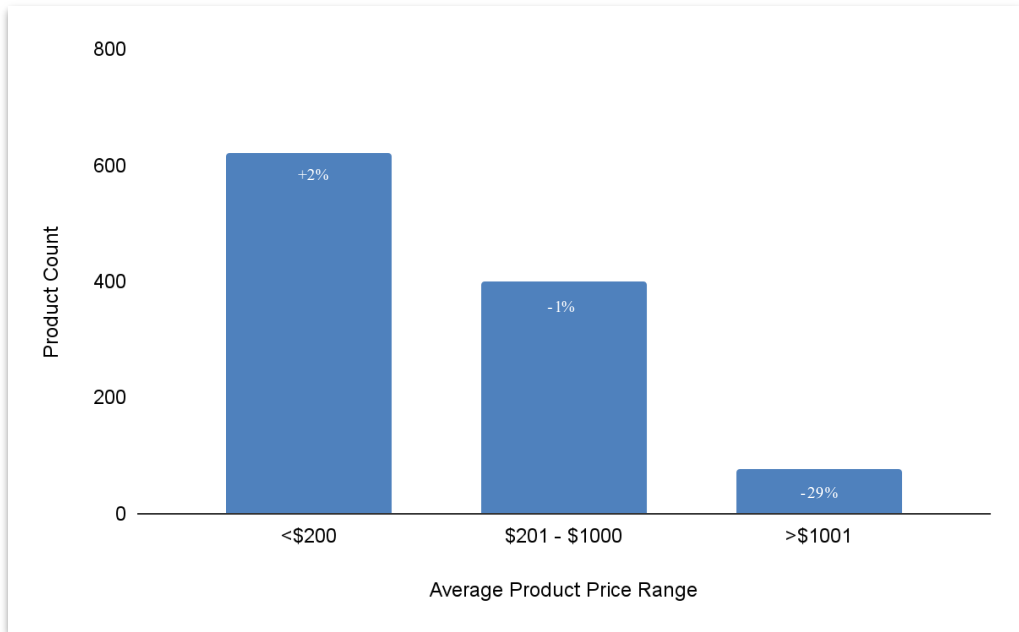
Consumer Price Index



Retail Sales - Furniture (in million \$)



Retailers are responding - the # of Furniture SKUs selling for over \$1K in Google Shopping has decreased 29% YoY.

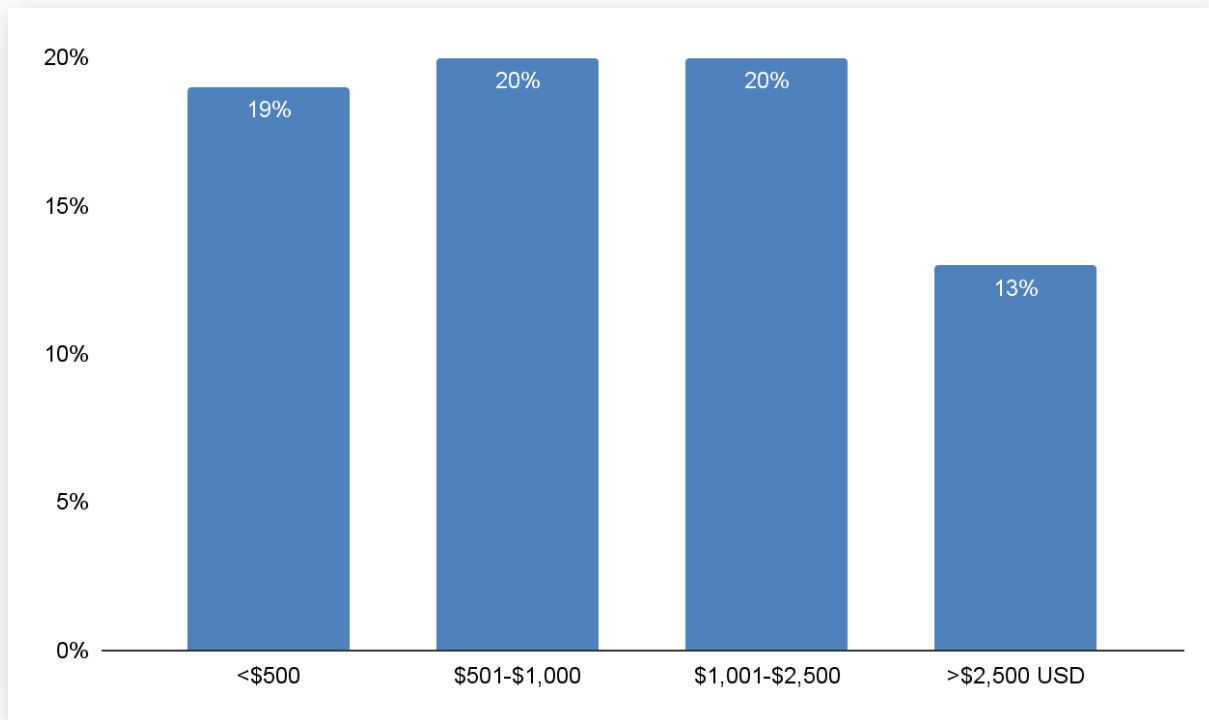


+2%

YoY increase in products with average prices under \$200

Consumers are ready to open their wallets for the right buy during 2H 2025: Robust demand persists for furniture at mid-tier prices.

Expected amount of spending on furniture in the next year among consumers in the US



40%

of U.S. consumers who
intended to buy furniture said
they would **spend between**
\$500 - \$2,500 for a purchase in
2025

Price Sensitivity: Put Insights Into Action

Furniture **sales will grow** during 2H 2025 - but discerning consumers will expand their research process.



Compete During The Full Purchase Journey

Winning your share of the growth depends on **engaging shoppers on multiple fronts**.

Use online video to **deliver brand messages & showcase your products** to Strategic Audiences.

Competitive **prices, promos & multi-functional pieces** are table stakes for winning 2H 2025.



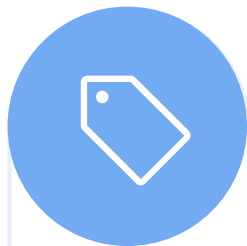
Communicate Value To Win Customers

Furniture shoppers are increasingly **cost-conscious**.

Remember to to **deliver discounts** at the right times with action-oriented messaging that **showcases value, versatility, and quality**.

04

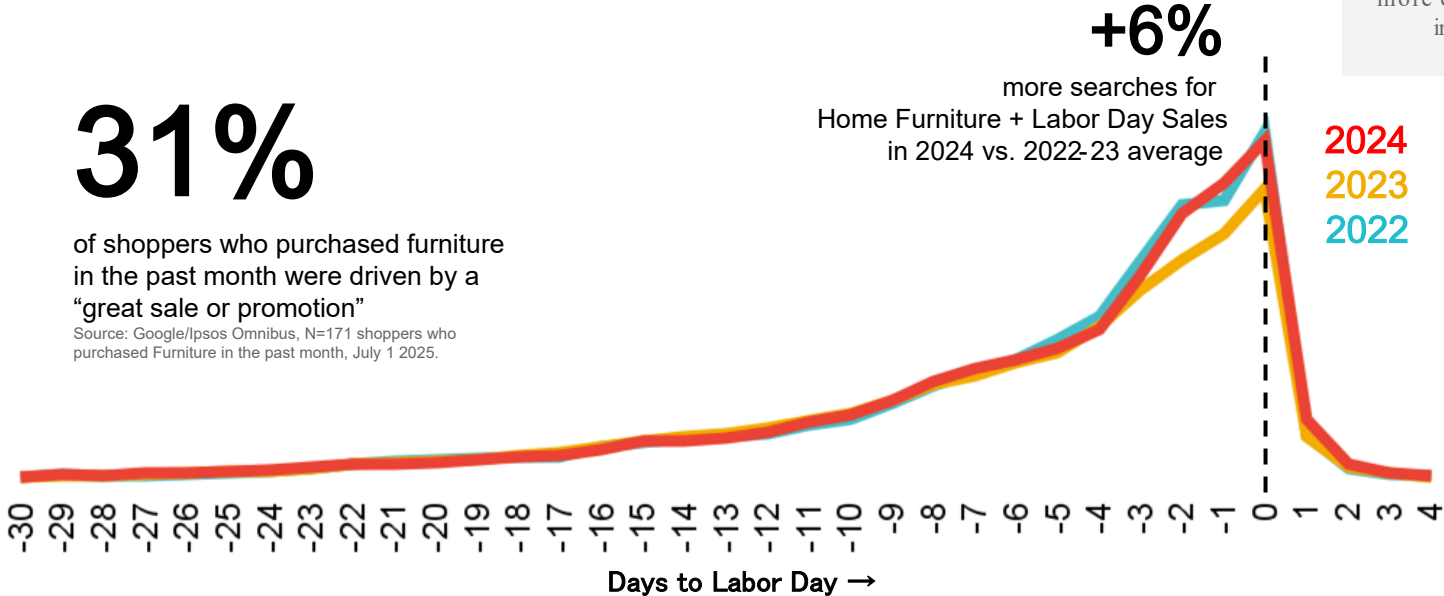
Focus On: Labor Day 2025



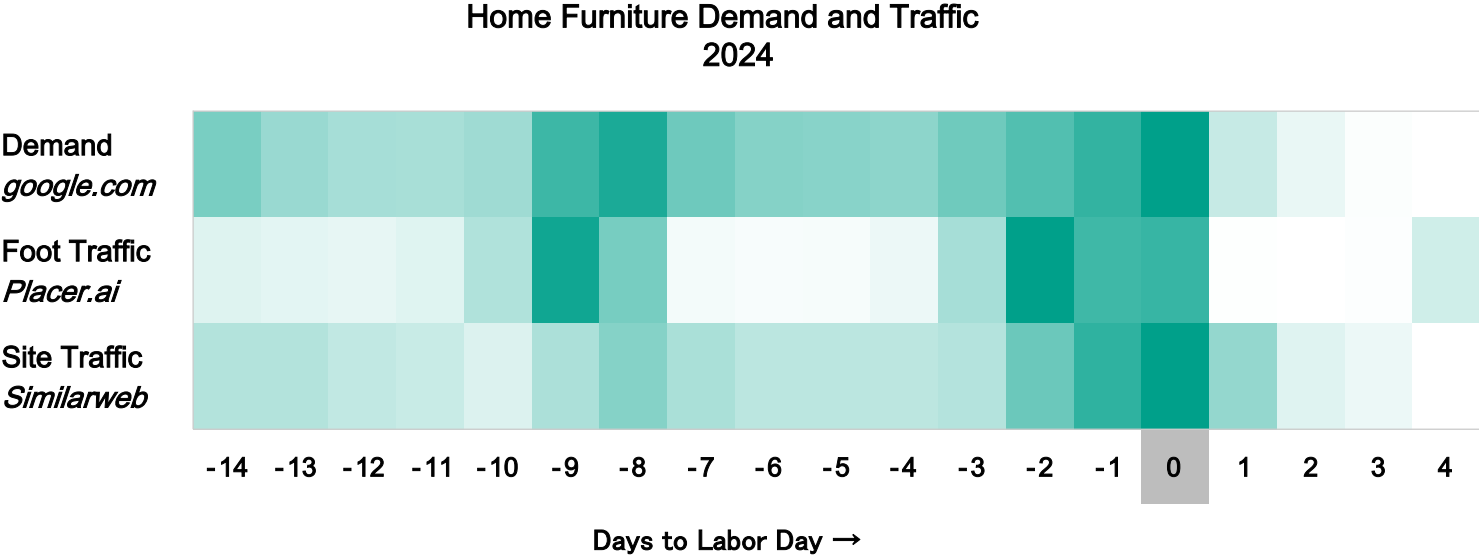
Labor Day is one of the biggest sales events for home furniture retailers, and consumer interest is on the rise.

Demand for Home Furniture + Labor Day Sales
2022-2024

💡 88% of 2025 Labor Day furniture shoppers plan to spend the same or more compared to last year, with interest starting earlier



Leading up to Labor Day, home furniture shoppers take advantage of both digital and physical touchpoints to find the best products and deals.



Omni Experience

Consumers research products online well in advance, with store and site traffic surging the entire Labor Day weekend

During the week of Labor Day 2024, mattresses and sofas were among the best-selling Home Furniture products on Google Shopping.

Beautyrest BR800 Top
Mattress



#1

Spa Sensations by Zinus
8 inch Memory Foam
Mattress



#2

Peakform 6-Foot
Centerfold Table



#3

The Nectar Memory
Foam Mattress



#4

DreamCloud Classic
Hybrid Mattress



#5

TOP 10 FURNITURE PRODUCTS SOLD

Ashley Darcy Sofa



#6

Harlow Solid Wood Platform
Bed Red Barrel Studio



#7

Staples Cartwright
Ergonomic Fabric
Swivel Task Chair



#8

Furmax Chenille U Shaped
Sectional Sofa



#9

IKEA BILLY bookcase



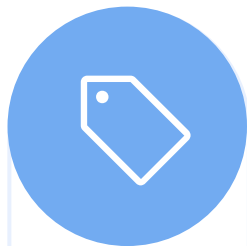
#10

* Popularity is based on the estimated number of products sold. Out of 20K products

Source: Google Merchant Center - Best Sellers Report - Week of Labor Day 2024| US

05

Q4 Lookahead: Holiday 2025



What **% of shoppers** are more choiceful with how they spend their money at the moment because they are worried about the future?

- a.) 23%
- b.) 61%
- c.) 45%
- d.) 80%

A pair of hands is holding a white tablet. The tablet screen displays the text "TRIVIA TIME" in a bold, blue, sans-serif font. The background is a solid light gray.

TRIVIA TIME

What **% of shoppers** are more choiceful with how they spend their money at the moment because they are worried about the future?

- a.) 23%
- b.) 61%**
- c.) 45%
- d.) 80 %

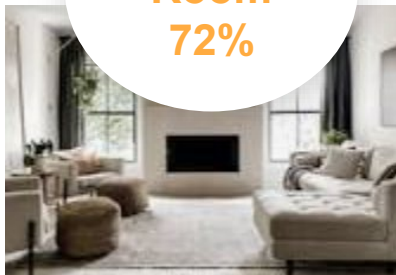
A hand is holding a white tablet. The tablet screen displays a large blue percentage '61%' and a line of text below it. The background is white.

61%

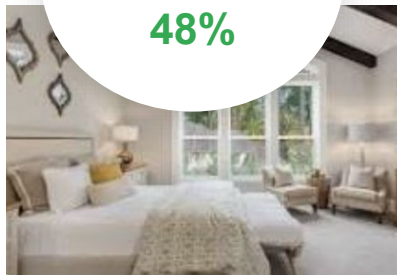
Of shoppers say they are more choiceful with how they spend their money because they are worried about the future.

The **living room** emerges as the top focus area for furniture shoppers this holiday season 2025

**Living
Room
72%**



**Bed
Room
48%**



**Kitchen
48%**



**Patio
29%**



**Bath
room
28%**

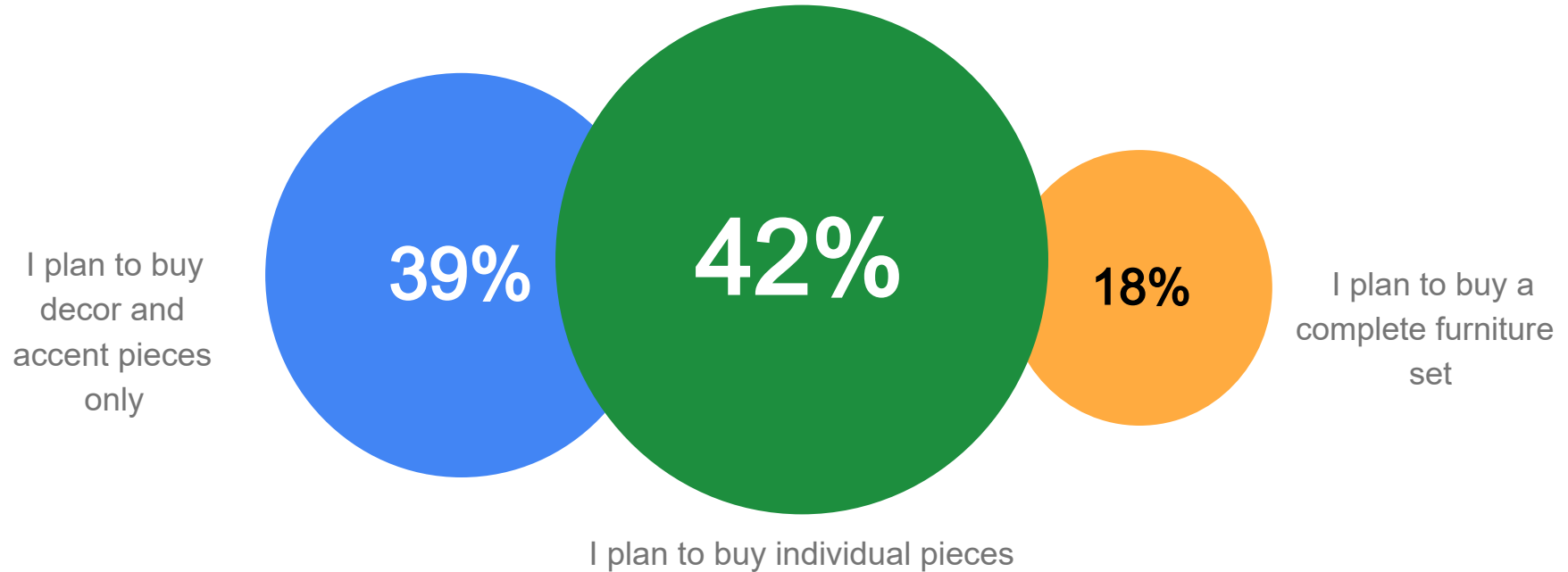


**Home
Office
21%**



Refresh creatives, align investments to target more consumers with what they would be looking for

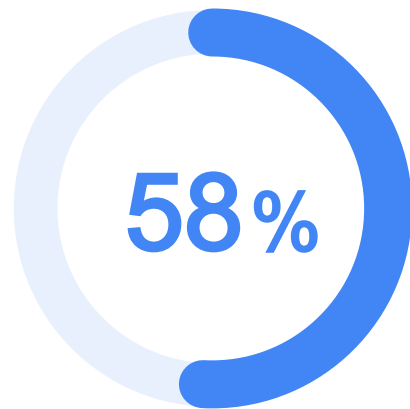
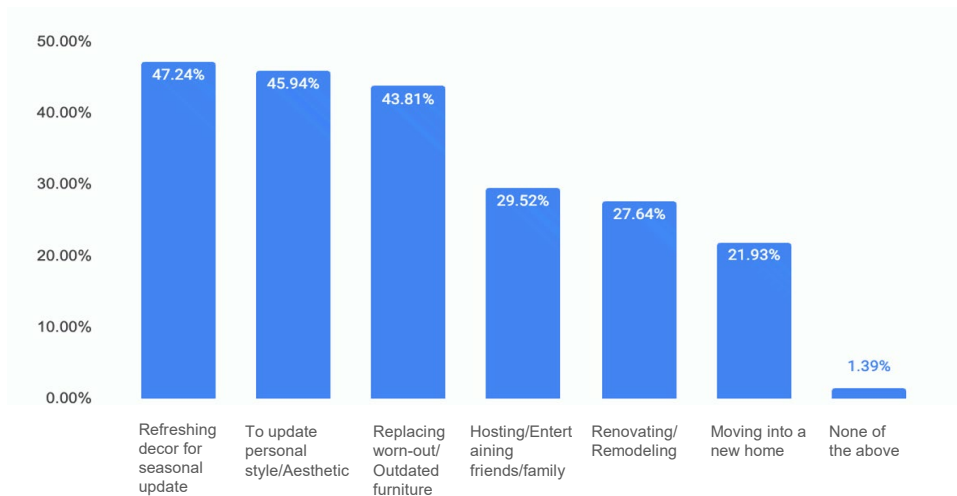
81% consumers plan to buy individual pieces or decor/accent pieces



Clear messaging around unbundling pieces/sets, enabling the consumer to choose the right product at the their price point

As colder weather arrives, consumers are looking to update their homes by refreshing furniture styles and replacing older pieces.

For which of the following occasions, if any, do you anticipate purchasing Home furniture and/or Home decor during Holiday/Winters 2025?

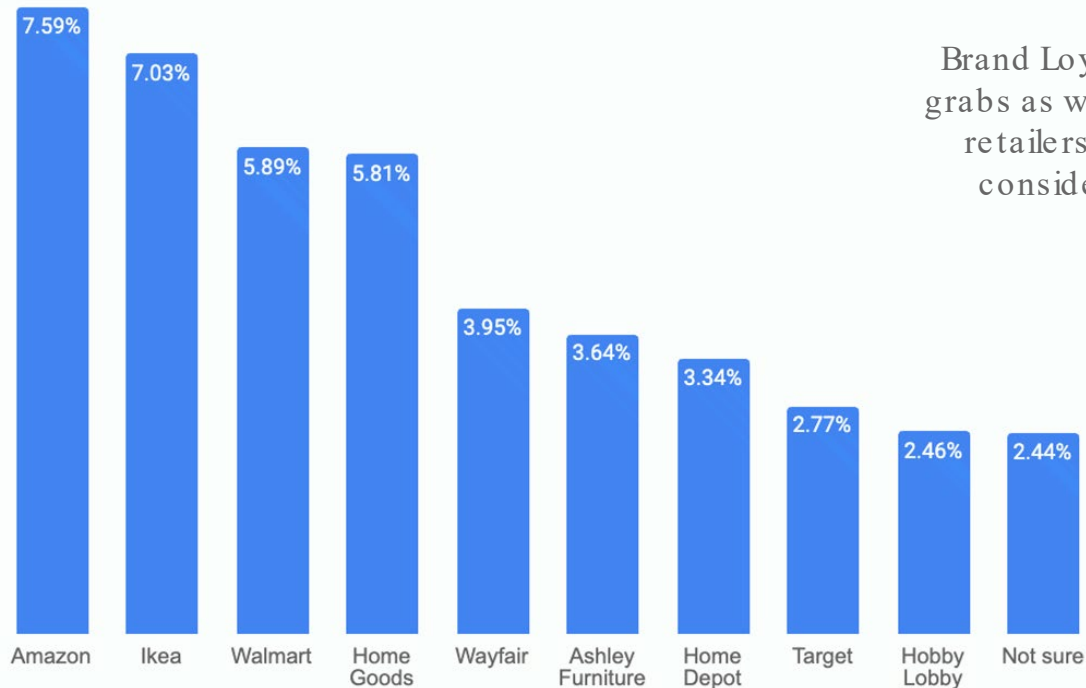


Of Gen Z and Millennial home furniture shoppers say that **updating their personal style/aesthetic** is their primary purchase driver

When it comes to unaided consideration, both Big Box & online-only retailers are top-of-mind for US furniture & decor shoppers...

Q:

What retailer would you **consider first** when shopping for furniture or decor this holiday season?

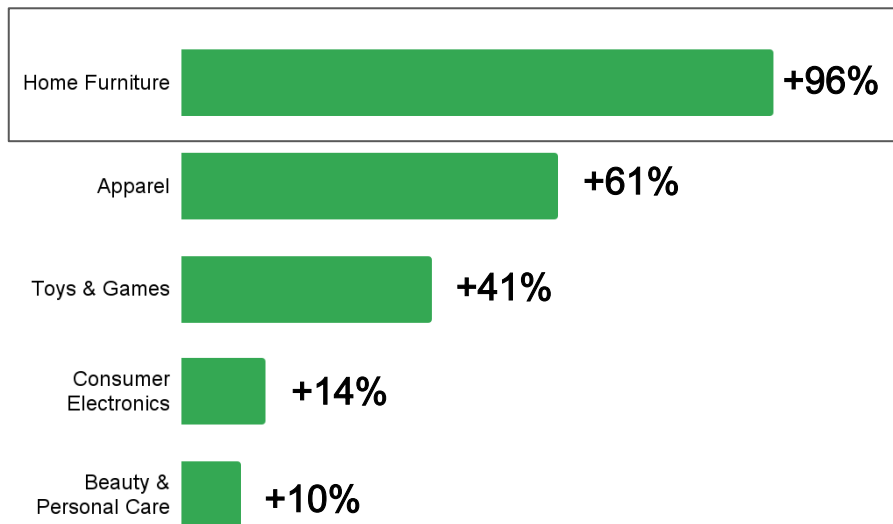


Brand Loyalty is up for grabs as we see a mix of retailers pop-in the consideration set

Searches on Google Maps: Home Furniture Stores were a critical touch points during Black Friday last year

Google Maps Searches on Black Friday vs Thanksgiving - Christmas Average

Source: Google Maps Data



Holiday shopping: Unlocking the modern consumer's new value equation

1. _____

Highlight categories and products consumers are looking for

2. _____

Enable AI to deliver on goals

Searching, streamlining, scrolling and shopping are intertwined, setup your strategy to win their attention

3. _____
Optimize your Content

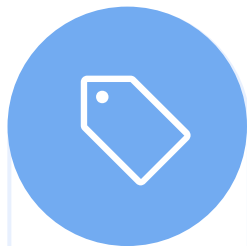
For what is top of mind for your consumers during pre-research, during buying and across all channels

4. _____
Purchasing Ease

Meet them when they are ready convert and hit that purchase button

06

Google Innovation





More than **15%**



of daily searches
have **never been**
searched before

Google AI is giving Search superpowers and people are loving what they can do with it

They search more **naturally**

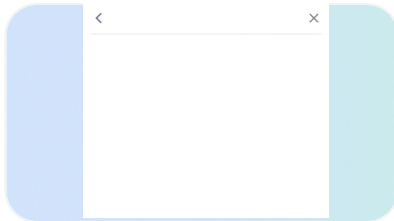
They search **more**

They're more **satisfied**

Google Lens

Search what you see

- Lens is now at more than 25 billion queries a month.
- Younger users who have tried Circle to Search now use it to start more than 10% of their searches.



AI Overviews

Find information quickly for complex questions

- AI Overviews reached over 2B monthly users across more than 200 countries and territories and 40 languages.
- AI Overviews brings generative AI to more people than any other product in the world.

AI Mode

Get help with your toughest questions

- People are using AI Mode to learn, explore or dig deeper by asking open-ended and follow-up questions.
- Early testers of AI Mode are asking much longer queries, 2-3 times the length of traditional searches.

SEO

Three things to do for AI search experiences

The way people discover your content continues to evolve, but our core goal remains the same:
help people find outstanding, original content that adds unique value

1 Focus on unique, valuable content for people

Meet users' preferences in today's multimodal search environment, supporting your text content with high-quality images, videos.

2 Ensure we can access your content

Prioritize content-rich pages for indexing and crawling, and ensure structured data is always supported by visible content.

3 Understand the full value of your visits

Focus on how well users get information or finish tasks, not just on clicks.



Google Lens

25 billion

visual searches
conducted every month

1 in every **4**

visual search queries done
using **Google Lens** have a
commercial intent .

How to use **Google Lens** in your daily life

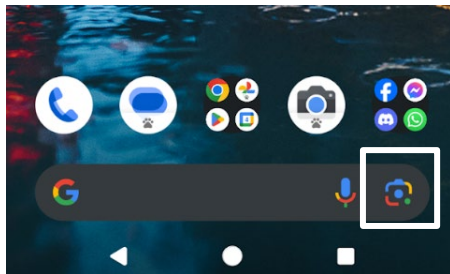
[Shop](#)

[Translate](#)

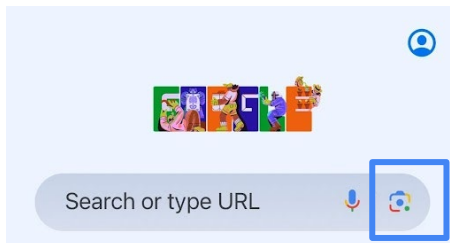
[Learn](#)

Let's give Google Lens a try

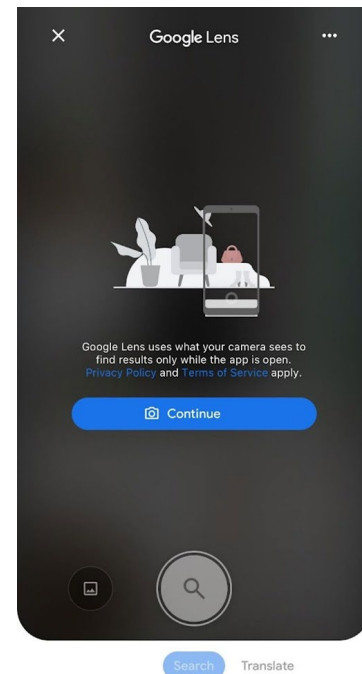
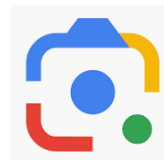
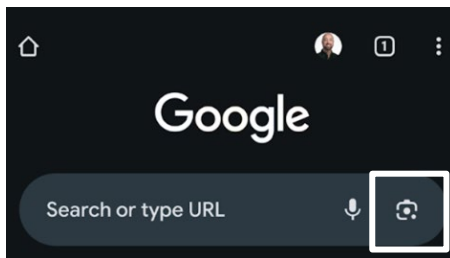
Android



iOS



Google.com



Does Google Lens correctly identify this item?



Maimz Sofa from Ashley Furniture

Thank you



Google Insights & Trends

Google Trends



Explore what users are
searching for right now

trends.google.com



Discover, watch, & share
originally -created videos

youtube.com

Think with Google

Articles with Insights,
Ideas, & Inspiration

thinkwithgoogle.com