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Where Holiday Shoppers Turn to AI, and Where Retailers Show Up



Google AI Overviews now appear in 85% of US eCommerce searches, up from 24% in April 2026, and in 64% of all US searches, up from 48% (BrightEdge AI Overview benchmark, April to November 2026). Apple is the brand AI names most in holiday shopping answers on both Google AI Overviews and ChatGPT.

Holiday shoppers use Google AI Overviews most for specific product questions, not open-ended gift ideas. Across 1,212 holiday shopping prompts carrying 31.4 million monthly searches, brand- or product-named questions take 44% of AI Overviews volume; open-ended gift questions take 12% (BrightEdge AI Hyper Cube, US, December 2025 to September 2026).

Retailers are named in most AI answer volume until after the gift, because the biggest prompts are deal searches. On Google, 85% of Black Friday answer volume names a retailer, against 54% at Christmas. ChatGPT is the exception when shoppers compare products (the Desire stage): it names a retailer in 13% of that volume, against 75% on Google. Google AI Overviews account for about 98% of the search volume represented in this sample, which does not measure overall Google or ChatGPT usage.

SUMMARY

Key findings

- **Holiday shoppers ask Google's AI about specific products.** Brand- or product-named questions take 44% of AI Overviews shopping volume; open-ended gift ideas take 12%.
- **Black Friday belongs to the big-box retailers.** 85% of Black Friday AI answer volume on Google names a retailer. Best Buy appears in 65%, and in none of the Christmas answers.
- **ChatGPT skips the store when shoppers compare products.** At the Desire stage, ChatGPT names a retailer in 13% of answer volume, against 75% on Google.
- **Leading brands are broadly consistent across engines.** Apple, Nintendo, Breville, Coach, Nike and LEGO lead their categories on Google and ChatGPT; Dyson leads beauty on Google and by number of answers on ChatGPT.
- **Named is not cited.** On ChatGPT, bestbuy.com is the only retailer among the top 10 cited sources; publishers and deal sites hold the rest.

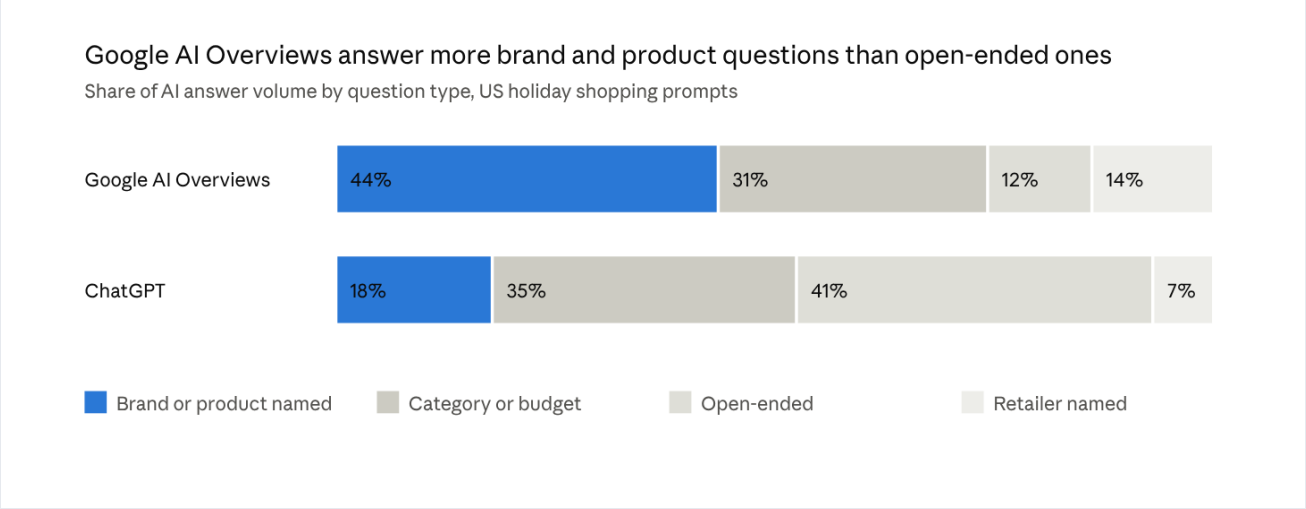
All figures: BrightEdge AI Hyper Cube, US, Google AI Overviews December 2025 to September 2026, ChatGPT January to September 2026, weighted by BrightEdge search volume.

01

Where shoppers turn to AI

On Google, AI Overviews are called in for specific questions more than broad ones. On ChatGPT, open-ended questions lead, but one prompt is nearly half of that volume.

EXHIBIT 1



BrightEdge AI Hyper Cube, US, holiday shopping prompts. Google AI Overviews December 2025 to September 2026 (1,212 prompts, 31.4M monthly searches); ChatGPT January to September 2026 (888 prompts, 0.6M).

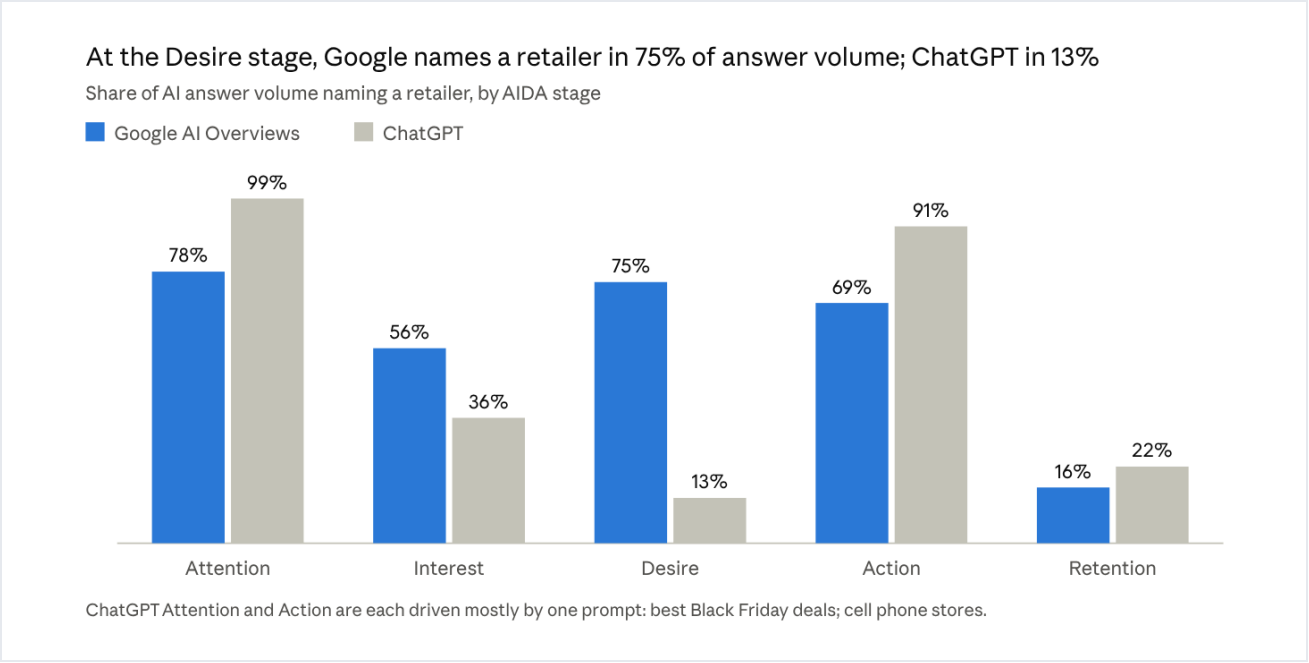
Google: 1,212 prompts, 31.4 million monthly searches. ChatGPT: 888 prompts, 0.6 million; "best Black Friday deals" is 47% of its open-ended volume. AI Hyper Cube holds only prompts where AI answered, so this shows what AI is asked, not what share of all searches reach AI.

02

Retailers are named in most AI answer volume until after the gift

On Google, answers naming a retailer carry 56% to 78% of volume from Attention to Action, then 16% at Retention. ChatGPT names a retailer in 13% of Desire-stage volume, against 75% on Google.

EXHIBIT 2



BrightEdge AI Hyper Cube, US, all categories, prompts naming a store in the question excluded. Google answer volume by stage: 2.5M, 8.8M, 11.7M, 3.3M, 0.6M.

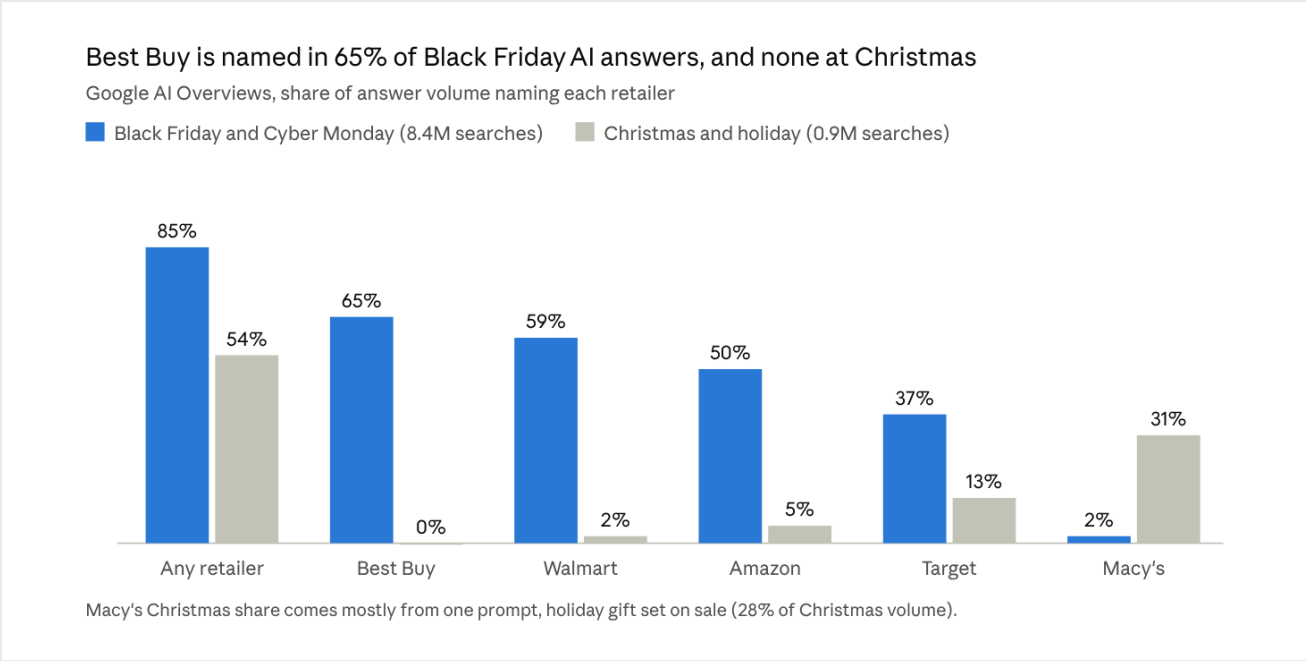
All categories, prompts naming a store in the question excluded. One prompt is over half the cell: "best Black Friday deals" (54% of ChatGPT Attention) and "cell phone stores" (68% of ChatGPT Action). On Google, "best black friday deals" is 39% of Attention and "nintendo switch 2 for sale" 20% of Desire.

03

Black Friday is a big-box moment; Christmas is not

Black Friday carries 8.4 million monthly searches in AI Overviews, nine times Christmas. Best Buy is named in 65% of Black Friday answer volume and none of Christmas.

EXHIBIT 3



BrightEdge AI Hyper Cube, Google AI Overviews, US, December 2025 to September 2026. Black Friday and Cyber Monday 175 prompts; Christmas and holiday 259 prompts.

Department stores lead Christmas volume through one prompt: "holiday gift set on sale" is 28% of Christmas volume, and its answer names Macy's, Kohl's and JCPenney. On ChatGPT, Best Buy is named in 95% of Black Friday answer volume (238,000 searches), excluding "best Black Friday deals", which carries 47% of that volume. Halloween and Thanksgiving have almost no shopping prompts once film, parade and game questions are removed.

04

Category leaders are broadly consistent across engines; the retailers are not

Where the data supports a comparison, the leading brand is the same on Google and ChatGPT. ChatGPT beauty volume is too small to rank by share, so Dyson leads there by number of answers. The gap is retailers: ChatGPT names them far less, and in gaming it puts GameStop first where Google puts Best Buy.

EXHIBIT 4

Category	Google AI Overviews: top brands	ChatGPT: top brands	Google: top retailer	ChatGPT: top retailer
Consumer electronics (188 / 73 prompts)	Apple 62%, Sony 32%, Samsung 29%	Apple leads by prompt count (44 of 73); Samsung leads volume through one "cell phone stores" prompt	Best Buy 61%	Best Buy 69%
Gaming (202 / 121)	Nintendo 63%, PlayStation 26%, Xbox 12%	Nintendo 36%, PlayStation 28%, Xbox 28%	Best Buy 75%	GameStop 37%
Beauty and personal care (154 / 106)	Dyson 47%, Shark 12%, Philips Norelco 10%	Dyson leads by prompt count (41 of 106); volume too small to rank	Sephora 19%	None above 2%
Home appliances (39 / 51)	Breville 32%, Ninja 28%, Dyson 24%	Breville 68%, Ninja 47%, Cuisinart 33%	Target 32%	Target and Walmart, 10% each
Handbags and purses (36 / 63)	Coach 46%, Louis Vuitton 30%	Coach 59%, Louis Vuitton 23%	Nordstrom and Saks, 8% each	Nordstrom 8%
Clothing (64 / 62)	Nike 50%, Brooks 35%, Hoka 34%	Nike 43%, Hoka 31%, New Balance 28%	Macy's 19%	Old Navy 15%
Toys (47 / 47)	LEGO 40%, Pokemon 35%	LEGO 78%, Magna-Tiles 22%	Walmart 51%	Walmart 26%

Share of the category's AI answer volume naming each brand; one answer can name several, so shares do not sum to 100. Prompts in brackets are Google / ChatGPT. Handbags and clothing answers rarely name any store on either engine: shoppers are sent to the brand. ChatGPT gaming is the closest race: Xbox ties PlayStation on volume and leads on prompt count.

05

Named is not cited: ChatGPT cites publishers, not stores

In holiday and gift answers on ChatGPT (January to September 2026), bestbuy.com is the only retailer in the top 10 cited domains, at 10.4% of citations. Amazon holds 23.5% of mentions among eight tracked retailers, but amazon.com sits below 3.2% of citations, outside the top 10. The two measures use different denominators, so they are not a funnel; they show that being named and being cited are separate wins.

EXHIBIT 5

Rank	Google AI Overviews, top cited domains	Share of citations	ChatGPT, top cited domains	Share of citations
1	google.com	15.7%	bestbuy.com	10.4%
2	youtube.com	8.8%	thekrazycouponlady.com	9.0%
3	amazon.com	6.6%	visualping.io	7.3%
4	walmart.com	4.4%	techradar.com	6.4%
5	reddit.com	4.2%	nbcnews.com	6.4%
6	bestbuy.com	3.7%	realsimple.com	5.9%
7	target.com	3.4%	people.com	4.8%

EXHIBIT 6



Figure: Being named is not the same as being cited. Amazon holds 23.5% of mentions among eight tracked retailers in ChatGPT holiday answers, while amazon.com receives under 3.2% of citations; bestbuy.com is the only retailer among the top 10 cited domains, at 10.4%. Source: BrightEdge AI Hyper Cube, ChatGPT, US holiday and gift prompts, January to September 2026.

Prompts containing gift, black friday, cyber monday, christmas, holiday or stocking; Google December 2025 to September 2026, ChatGPT January to September 2026. Department store domains are outside both top 10s. Department stores do better in the holiday months on Google: Macy's holds 8.6% of mentions among eight retailers in December to January, against 5.3% in August to September. Across holiday and gift answers overall, no retailer is described negatively in more than 1.4% of mentions.

06

Retailers peak at Desire in electronics and gaming, and at Action in clothing

On Google, electronics answers name a retailer in 88% of Desire-stage volume and gaming in 83%. Clothing answers name a store in 69% of Action volume, mostly "near me" searches.

EXHIBIT 7

Category (Google)	Attention	Interest	Desire	Action	Retention
General gifts and deals	88%	48%			
Consumer electronics		68%	88%	48%	
Gaming			83%	53%	0%
Beauty and personal care		34%		41%	0%
Home appliances		24%			
Handbags and purses			31%		
Clothing		42%		69%	
Toys		21%			

Share of answer volume naming a retailer. Blank cells have too little data to report. Gift cards, books and experiences are left out. On ChatGPT, handbag Desire answers name a retailer in 8% of volume, against 31% on Google.

07

Who is named: Walmart, Target and Best Buy carry the middle of the journey

On Google, Walmart and Best Buy are each named in 51% of Desire-stage answer volume and Target in 48%. Amazon leads at Attention, with 71%, then falls to 3% at Action.

EXHIBIT 8

Name (Google, share of answer volume)	Attention	Interest	Desire	Action	Retention
Amazon	71%	13%	26%	3%	3%
Walmart	60%	26%	51%	40%	0%
Best Buy	61%	32%	51%	29%	0%
Target	57%	12%	48%	33%	0%
GameStop	0%	1%	24%	22%	0%
Macy's	1%	7%	3%	14%	1%
JCPenney	43%	3%	2%	0%	0%
Kohl's	2%	3%	2%	12%	0%
Nordstrom	1%	6%	1%	8%	0%
Home Depot	5%	3%	0%	1%	0%
Amazon own devices (Echo, Kindle, Fire TV, Ring, Blink)	17%	3%	0%	0%	0%
Apple	10%	20%	22%	16%	8%
Samsung	49%	17%	2%	4%	3%

Attention shares lean on one prompt: "best black friday deals" (39% of Attention volume) names Amazon, Best Buy, JCPenney, Samsung, Target and Walmart. Department stores are near zero at Desire, where the purchase choice is made. Apple and Samsung are brands, not retailers.

08

Gifts for kids are where retailers drop out

On Google, answers about gifts for kids and teens name a retailer in 14% of volume, against 37% for him and 81% for her. Of the recipient groups, gifts for him carry the most volume, at 0.7 million searches.

EXHIBIT 9

Recipient (Google gifting prompts)	Prompts	Answer volume	Share of gifting volume	Naming a retailer
Him (men, husband, boyfriend, dad)	72	694,229	19%	37%
General gift ideas	108	667,162	19%	62%
Kids and teens	64	556,297	15%	14%
Her (women, wife, girlfriend, mom)	36	316,006	9%	81%

Consideration prompts carry 56% of Google gifting volume and name a retailer in 39% of it; Transactional prompts name one in 74%. Gift card prompts (38% of gifting volume) are left out because the gift card brand list included retailers. ChatGPT gifting volume is too small to weight reliably.

09

Where shoppers go next: store hours, delivery and returns

Once the gift is chosen, the questions change to where and when, and that is where big-box retailers come back into the answer. On Google AI Overviews, the 50 largest holiday store-hours prompts carry about 4.7 million monthly searches in August to September 2026. They are led by "stores open on thanksgiving" (753,300 monthly searches).

EXHIBIT 10

Retailer	Named in "what's open" answers	Described negatively	Described positively
Walmart	31	22	2
Target	30	21	2
Costco	25	18	0
Best Buy	16	10	2
CVS	23	0	12
Kroger	27	0	11
Dollar General	27	0	12

Google AI Overviews, 31 multi-store "what is open on Thanksgiving" prompts, August to September 2026. Sentiment is BrightEdge's tag on how each brand is described in the answer.

On "what's open" questions, AI Overviews describe the big-box chains negatively in about 7 of 10 answers, because they are closed, while pharmacies, grocers and dollar stores are never described negatively.

Two more patterns from the same stage:

- **Amazon owns returns, delivery and gift wrap.** Amazon is named in 36 of 50 Google answers on holiday returns, shipping, delivery and wrapping, including "how to return a gift to amazon" and "Is Amazon delivering on Thanksgiving?".
- **Shoppers still ask last year's questions.** 9 of 50 ChatGPT store-hours prompts carry a past year, such as "What time does Target open on Black Friday 2025?". Answers to these depend on retailers keeping last year's pages updated or redirected. This is the same exposure as the out-of-date Black Friday pages in our October edition.

10

What marketers need to know

1. Start with Google. Google AI Overviews account for about 98% of the search volume behind the prompts in this sample. This is not a measure of total Google versus ChatGPT usage. Optimize for Google first, then extend to ChatGPT.

2. Win the specific question, not only the gift guide. Brand- and product-named questions are the largest share of AI Overview volume (44%). Product pages, deal pages and comparisons are the content these answers draw on.

3. Treat Black Friday as the retailer moment. 85% of Black Friday answer volume names a retailer; Best Buy alone is in 65%. Keep this year's deal pages live, dated and crawlable before the week starts.

4. Plan for ChatGPT to skip the store. At the Desire stage, ChatGPT names a retailer in 13% of volume, against 75% on Google. Brands win that answer, so retailers need product-level content brands cannot supply.

5. Measure citations, not only mentions. On ChatGPT, publishers and deal sites hold most citations; bestbuy.com is the only retailer in the top 10.

6. Close the kids gap. Gift answers for kids and teens name a retailer in 14% of volume. Gift content by age and interest is the opening.

11

Frequently asked questions

What do holiday shoppers ask AI?

On Google AI Overviews, 44% of shopping answer volume comes from questions naming a brand or product, and 12% from open-ended gift questions.

Do retailers appear in AI shopping answers?

Yes, in most of the volume: 56% to 78% on Google from Attention to Action, falling to 16% after the gift.

Does ChatGPT behave differently?

At the Desire stage, ChatGPT names a retailer in 13% of answer volume, against 75% on Google. Where the data supports a comparison, its category brand leaders match Google's.

Which brands lead each category?

Apple in electronics, Nintendo in gaming, Breville in home appliances, Coach in handbags, Nike in clothing and LEGO in toys, on both engines. Dyson leads beauty on Google; ChatGPT beauty volume is too small to rank by share.

How prominent are Google AI Overviews in holiday shopping searches?

Google AI Overviews appeared in 85% of US eCommerce searches in BrightEdge's November 2026 benchmark, up from 24% in April. Google remains the place to optimize first.

METHODOLOGY

Methodology and caveats

- **Source.** BrightEdge AI Hyper Cube, US English, pulled Nov 3 to 5, 2026. Google AI Overviews December 2025 to September 2026; ChatGPT January to September 2026, the earliest data available for each engine.
- **Panel.** 10 categories, each pulled with a brand list and stage wording (gift ideas, comparisons, where to buy, returns), plus seasonal pulls. A prompt is returned only when its answer names a listed brand.
- **Category.** Set by prompt wording, not by the pull that returned it. Generic gift and deal prompts are in General.
- **Exclusions.** How-to, support and repair, streaming, games, tickets, film locations, trivia, past-year questions, outlet-mall directories and 48 off-season prompts (Father's Day, Mother's Day, Valentine's Day, Memorial Day, Labor Day, summer and back-to-school sales).
- **Metric.** Every rate is weighted by BrightEdge volume. Prompt counts show only as the n behind a cell; cells with fewer than 20 prompts are not reported.
- **Outliers.** Single prompts move cuts: "best black friday deals" is 39% of Google Attention volume and "nintendo switch 2 for sale" 20% of Desire. ChatGPT volume is about 2% of Google's, so its shares are noisy.

- **Store-named questions.** They count in the question-type split and are excluded from every "naming a retailer" rate.
- **Selection.** Gift card and book brand lists included retailers, so those rates are left out.
- **Named, not cited.** Rates count brands named in answers; citation share is shown separately. Sentiment is BrightEdge's tag on each mention.
- **Store-hours section.** Uses a separate retailer brand set, August to September 2026, top 50 prompts by volume, counted out of 50. We did not check whether stated hours were correct.
- **Scope.** AI Hyper Cube holds prompts where AI answered. It cannot show what share of all shopping searches reach AI. No figure implies cause.
- **Timing.** AI answer data covers Google AI Overviews December 2025 to September 2026 and ChatGPT January to September 2026. Rankings describe answers in those windows, not live November answers. The AI Overview presence figures (85% of eCommerce, 64% overall) come from a separate BrightEdge benchmark, April to November 2026.
- **Sample.** Prompts come from category brand lists and shopping-stage wording, so they are a sample of shopping questions, not a census of all shopping activity. Google AI Overviews: 1,212 prompts; ChatGPT: 888 prompts.
- **Brand named most.** Apple is the brand named most across all categories on both engines when any single prompt over 15% of a brand's volume is set aside. Within ChatGPT consumer electronics, one "cell phone stores" prompt gives Samsung the volume lead; Apple leads by number of answers.

SOURCES

Sources

Press release: **https://www.brightedge.com/news/press-releases/ai-holiday-shopping-gift-retailer-leaders**

Report online: **https://www.brightedge.com/resources/research-reports/holiday-shopping-ai-search**

- BrightEdge AI Hyper Cube, pulled Nov 3 to 5, 2026.
- Store-hours, last-minute and returns pulls: BrightEdge AI Hyper Cube, Nov 4, 2026.