GrowByData

Market Signals Research Report

Retail Search Ads Before Black Friday 2026

What 47,702 Google Results Pages Showed in the Four Weeks Before Thanksgiving

Broad retail: pages with each ad format, weekly

Oct 22 to Nov 18, 2026



89.2%
of broad retail top-seller listings had no sale tag

Shopping Ads | Text Ads | Sale Tags

01 | THE SUMMARY

Shopping Ads Went From 7.2% to 41.6% of Broad Retail Pages

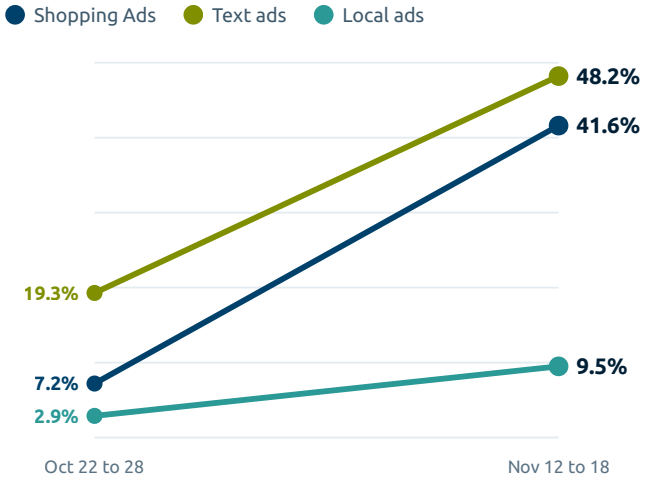
Retailers crowded more Google results with ads in the four weeks before Thanksgiving, yet most top-seller Shopping listings still showed no sale tag. Every figure describes monitored pages in the GrowByData Retail Industry Panel, not US retail advertising as a whole.

- Shopping Ads rose from **7.2% to 41.6%** of broad retail pages, a 477.8% relative increase.
- Text ad presence rose in **5 of 5** datasets; Shopping Ads rose in 4 of 5.
- Weekly text advertisers in the logged-in scan grew from **23 to 80**.
- **76.3% to 95.2%** of measured top-seller listings carried no sale tag.

EXHIBIT 1

Broad Retail: Pages With Each Ad Format

% of scanned Google results pages, first vs latest week



Source: GrowByData Retail Industry Panel, broad US retail panel, Oct 22 to 28 vs Nov 12 to 18, 2026. The Oct 29 to Nov 4 collection dip is excluded.

Key Takeaways

- **Ad formats got more crowded.** Text ads rose in every dataset and Shopping Ads in four of five.
- **The logged-in scan is the exception.** Shopping Ads already sat on about three in four pages there and stayed flat, 74.6% to 73.4%.
- **Growth came two ways.** New advertisers entered logged-in retail; tire incumbents simply showed up more often.
- **Sale tags stayed rare** a week before Black Friday, even as ad presence climbed.

Relative increase = (latest share / first-week share minus 1) x 100. The 477.8% figure is relative growth, equal to 34.4 percentage points.

02 | RESEARCH DESIGN

Five Datasets, Different Shopper Profiles, 47,702 Pages Scanned

The report compares matched weeks for ad presence and uses a longer observation window for Shopping offers and ad-copy examples.

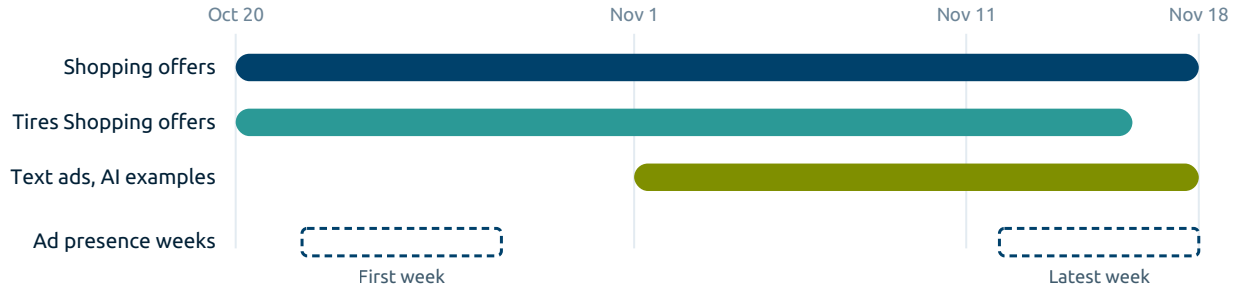
Dataset	Markets	First week	Latest week	Pages scanned, first / latest
Broad retail	13 US markets	Oct 22 to 28	Nov 12 to 18	20,797 / 20,846
Logged-in retail	13 US markets	Oct 22 to 28	Nov 12 to 18	840 / 1,120
Menswear	Los Angeles	Oct 22 to 28	Nov 12 to 18	303 / 405
Apparel and shoes	LA and New York	Oct 22 to 28	Nov 12 to 18	952 / 952
Tires	LA and New York	Oct 20 to 26	Nov 10 to 16	743 / 744

Source: GrowByData Retail Industry Panel, matched Google results scan weeks, October and November 2026.

EXHIBIT 2

Observation Windows

When each signal was collected, Oct 20 to Nov 18, 2026



Source: GrowByData Retail Industry Panel, observation windows. Tires offers run through Nov 16; tires ad presence compares Oct 20 to 26 with Nov 10 to 16.

How to read page share

Ad presence is the share of scanned results pages with **at least one ad** of a given format. It isn't impression share, clicks or spend.

How to read offers

On-sale share and $0 shipping are **weighted by seller appearances**. Discount depth uses only sale-tagged listings.

Scope: selected keywords, markets, devices, shopper profiles and prompts. The Oct 29 to Nov 4 collection dip isn't treated as a market decline. The logged-in latest week includes 1,120 pages after a collection backfill, so compare its shares, not raw counts.

03 | AD PRESENCE

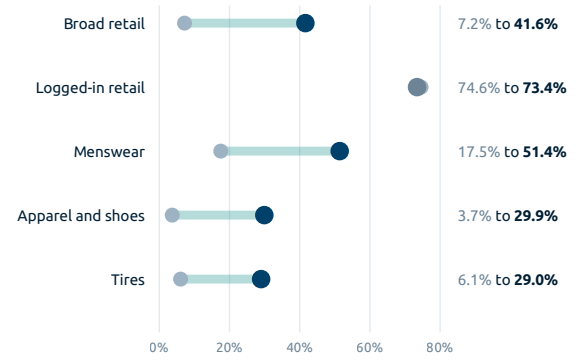
Text Ads Rose in All 5 Datasets; Shopping Ads Rose in 4

The logged-in scan is the only dataset where Shopping Ads didn't grow; they held near 74% of pages. Everywhere else, both formats took more of the page.

EXHIBIT 3

Shopping Ads: First vs Latest Week

% of scanned results pages, 0% to 80% axis

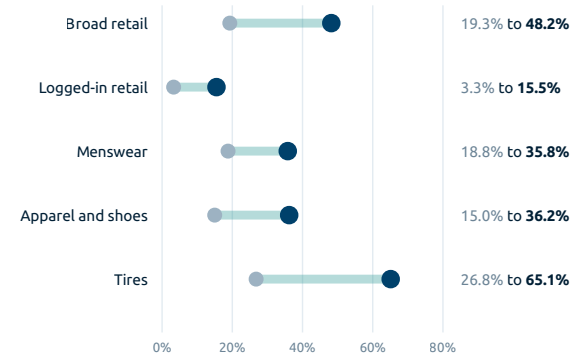


Source: GrowByData Retail Industry Panel, five datasets, matched weeks, 2026.

EXHIBIT 4

Text Ads: First vs Latest Week

% of scanned results pages, same 0% to 80% axis



Source: GrowByData Retail Industry Panel, same datasets and windows.

First week · Latest week · Latest week, lower than first

Dataset	Shopping change	Text change
Broad retail	+477.8%	+149.7%
Logged-in retail	-1.6%	+369.7%
Menswear	+193.7%	+90.4%
Apparel and shoes	+708.1%	+141.3%
Tires	+375.4%	+142.9%

Relative change, calculated from the displayed one-decimal weekly shares.

Key Takeaways

- **Tires hit 65.1%** text ad presence, the highest latest-week share of any dataset.
- **Read endpoints, not just growth rates,** when comparing datasets.
- **Apparel's 708.1% jump** came from a 3.7% start. Big relative growth doesn't mean the most crowded page.

04 | ADVERTISERS

Logged-In Text Advertisers Rose From 23 to 80

Two datasets show two different kinds of growth. One added new advertisers. The other kept the same advertisers and showed them far more often.

Logged-in retail: new entrants
Distinct advertisers **23 to 80** (+247.8%)

Logged-in retail: appearances
Text ad appearances **34 to 301** on 840 vs 1,120 pages

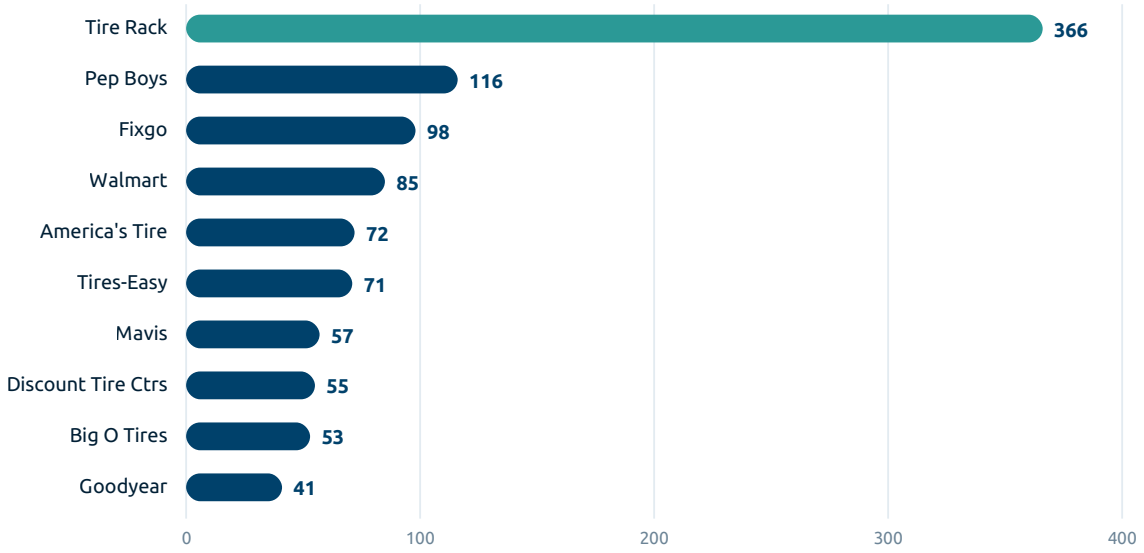
Tires: incumbents
Distinct advertisers **62 to 67** (+8.1%)

Tires: frequency
Text ad appearances **660 to 1,479** (+124.1%)

EXHIBIT 5

Tires: Text Ad Appearances by Advertiser

Observed appearances, latest week (Nov 10 to 16), ranked



Source: GrowByData Retail Industry Panel, tires text ads, Nov 10 to 16, 2026.

Key Takeaways

- **Tire Rack logged 366 appearances,** about a quarter of the 1,479 tire text ad appearances that week.
- **Respond differently to each.** New entrants call for coverage checks; incumbents ramping up call for frequency and position tracking.
- **An advertiser count can hide intensity.** Five more tire advertisers came with 819 more appearances.
- Appearances are observed placements, not budgets or CPC.

05 | SALE TAGS

Only 4.8% to 23.7% of Top-Seller Listings Showed a Sale Tag

Across measured top-seller Shopping listings, 76.3% to 95.2% carried no sale annotation in the 30 days before Thanksgiving week. These are appearance-weighted results from monitored sellers, not a retail price benchmark.

EXHIBIT 6

Share of Measured Listings Showing a Sale Tag

% of top-seller Shopping listing appearances, by dataset



Source: GrowByData Retail Industry Panel, Shopping Ads, Oct 20 to Nov 18, 2026; tires through Nov 16.

Dataset	Top sellers	Coverage	Item appearances
Broad retail	60	44.6%	~253,700
Logged-in retail	100	55.1%	~46,550
Menswear	15	39.1%	~5,950
Apparel and shoes	15	44.6%	~7,100
Tires	12	94.7%	~3,260

Sample coverage and approximate Shopping item appearances.

Key Takeaways

- **Logged-in retail was the most full-price:** 95.2% of listings had no sale tag. That panel includes luxury terms.
- **Tires and apparel discounted most often,** at 23.7% and 21.7%.
- A missing sale tag doesn't prove regular price. Coupons and other offers may still apply.

06 | DISCOUNTS AND SHIPPING

Menswear Sale Listings Averaged 39.4% Off

Discount depth and $0 shipping are separate signals. Menswear discounted rarely but deeply, while tires leaned on shipping labels.

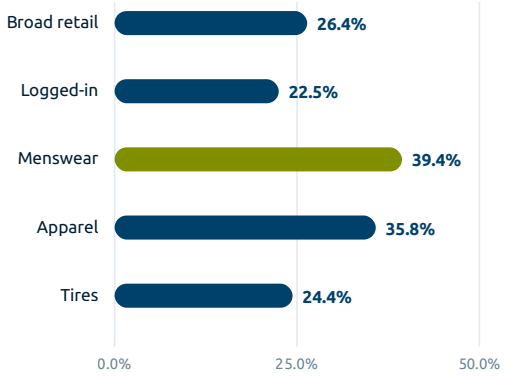
Menswear: only **9.5%** of listings carried a sale tag, but those averaged **39.4%** off, the deepest of any dataset.

Tires: **68.0%** of listings showed $0 shipping. One seller contributed roughly 57% of observations.

EXHIBIT 7

Average Discount When on Sale

% off, sale-tagged listings only

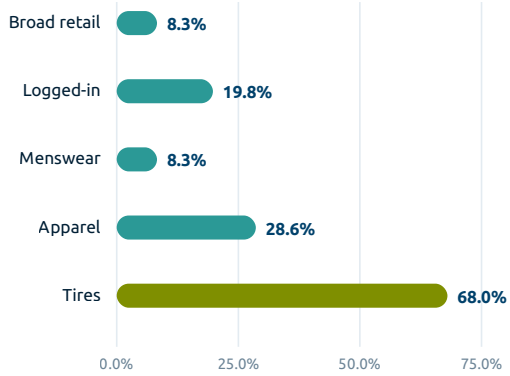


Source: GrowByData Retail Industry Panel, appearance-weighted, Oct 20 to Nov 18, 2026.

EXHIBIT 8

Listings With $0 Shipping

% of measured Shopping listings



Source: GrowByData Retail Industry Panel, same windows; tires through Nov 16.

Dataset	On sale	Avg discount when on sale	$0 shipping
Broad retail	10.8%	26.4%	8.3%
Logged-in retail	4.8%	22.5%	19.8%
Menswear	9.5%	39.4%	8.3%
Apparel and shoes	21.7%	35.8%	28.6%
Tires	23.7%	24.4%	68.0%

A sale tag describes an annotated Shopping listing. A $0 shipping label is a delivery signal and doesn't measure final checkout cost.

07 | SELLER PRESENCE

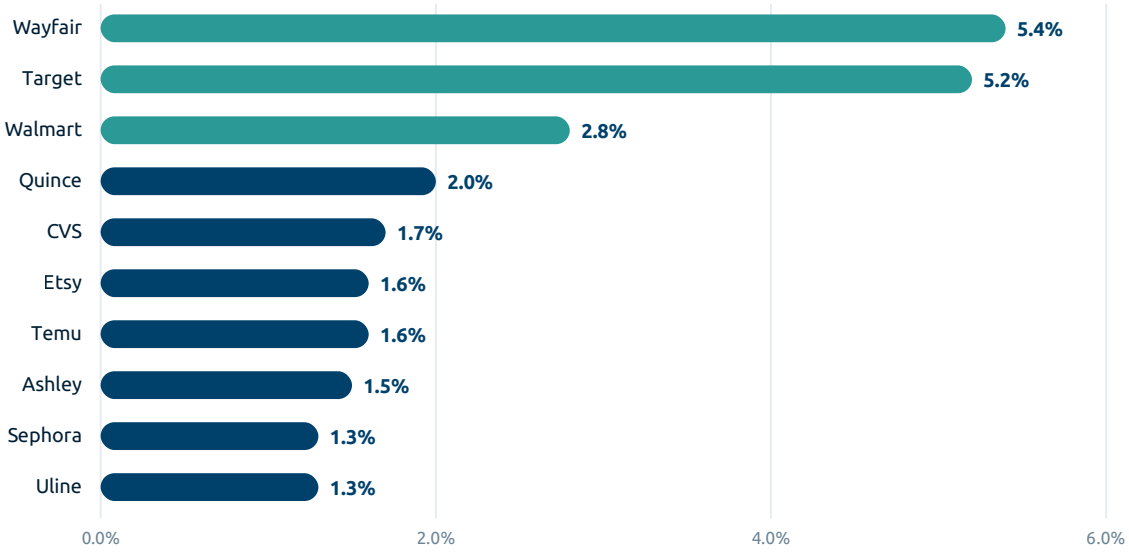
The Top 10 Sellers Held 24.5% of Broad Retail Listings

Wayfair and Target each held just over 5% of observed Shopping listing appearances. Smaller sellers together held three quarters of the page.

EXHIBIT 9

Shopping Listing Share: Ten Largest Sellers

% of observed broad-panel Shopping listing appearances



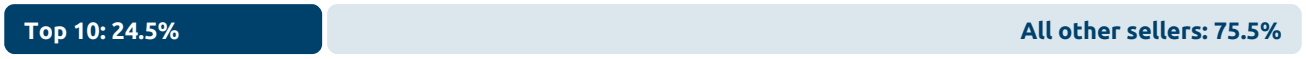
Source: GrowByData Retail Industry Panel, broad retail Shopping Ads, Oct 20 to Nov 18, 2026.

Key Takeaways

- **No seller held more than 5.4%** of broad retail listing appearances.
- **Category specialists matter.** The ten largest sellers don't capture every adjacent offer on your chosen results pages.
- **The long tail is the real competitor set.** 75.5% of appearances came from outside the top ten.

How Concentrated Was the Page?

Share of broad retail Shopping listing appearances



Individual seller shares are rounded separately and sum to 24.4%.

Source: GrowByData Retail Industry Panel, broad retail, Oct 20 to Nov 18, 2026.

08 | SELLER SALE TAGS

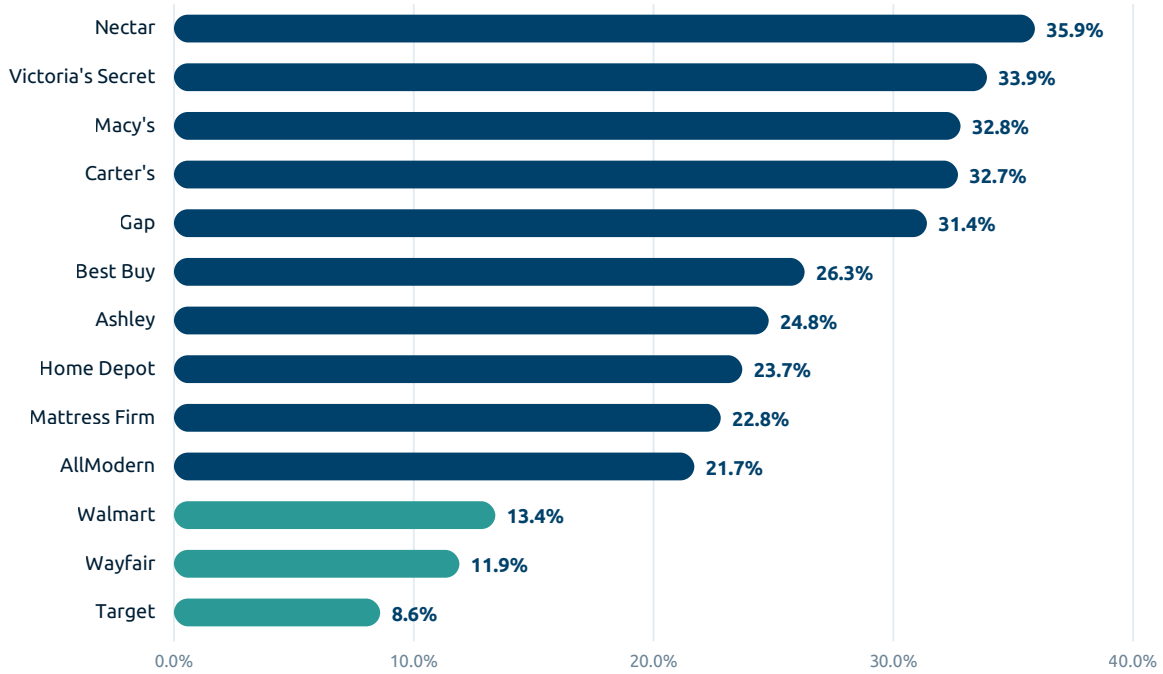
Nectar Tagged 35.9% of Listings on Sale; Target Tagged 8.6%

The largest sellers by listing volume weren't the most promotional. Nectar and several apparel-focused sellers tagged far more of their listings than Wayfair, Target and Walmart.

EXHIBIT 10

Selected Sellers: Listings Marked on Sale

% of each seller's observed Shopping listings with a sale tag



Source: GrowByData Retail Industry Panel, selected broad retail Shopping sellers, Oct 20 to Nov 18, 2026.

Other selected sellers Three largest sellers by appearances

Key Takeaways

- **Five sellers tagged more than 30%** of listings on sale: Nectar, Victoria's Secret, Macy's, Carter's and Gap.
- This measures sale-tag share, not promotional revenue or discount value.
- **The three biggest stayed mostly full price,** between 8.6% and 13.4%.

09 | APPAREL AND SHOES

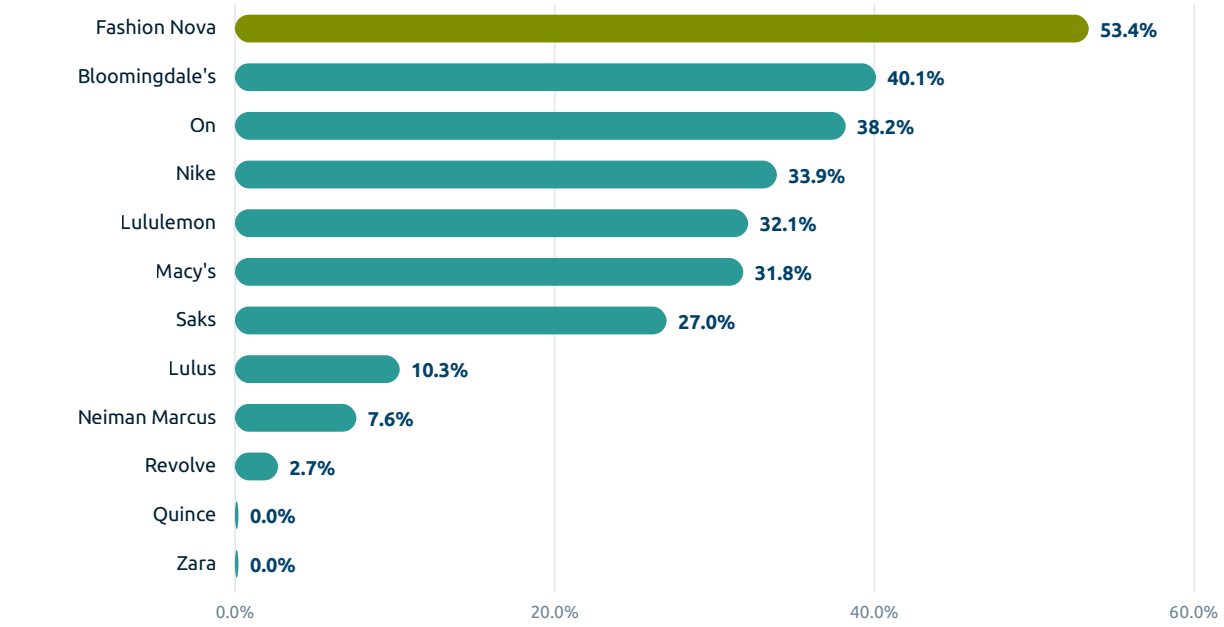
Fashion Nova Put 53.4% of Listings on Sale; Zara and Quince 0%

The panel monitored dresses and running shoes in Los Angeles and New York. Results are specific to these terms, sellers and cities.

EXHIBIT 11

Apparel and Shoes: Seller Listings With Sale Tags

% of observed Shopping listings, selected sellers



Source: GrowByData Retail Industry Panel, apparel and running shoes panel, Oct 20 to Nov 18, 2026.

Analyst Perspective

- **Seven of twelve sellers** tagged more than a quarter of their listings on sale.
- **Category averages hide seller strategy.** The listing directly next to yours is the comparison that matters.
- **Premium and fast fashion split sharply.** Neiman Marcus sat at 7.6% and Revolve at 2.7%.

The spread from **53.4%** to **0.0%** inside one category shows why a single category discount average can mislead an offer audit.

10 | PROMOTIONAL MESSAGING

Headlines Said Up to 60% Off; Sale Listings Averaged 18.4%

Some text ads led with large "up to" offers. The Shopping figures are seller-average discounts on sale-tagged listings, not discounts on the products named in those headlines.

EXHIBIT 12

Ad Headline Ceiling vs Shopping Sale-Listing Average

Advertised ceiling vs average discount on separate sale-tagged listings

Ashley

60.0%
Text ad headline, up to

18.4%
Avg discount on sale-tagged Shopping listings

Nectar

50.0%
Text ad headline, up to

8.6%
Avg discount on sale-tagged Shopping listings

Source: GrowByData Retail Industry Panel, broad panel. Text ad examples Nov 1 to 18; seller-level Shopping discounts Oct 20 to Nov 18, 2026.

Creative theme	Observed text ad example
Percentage-off offers	Ashley up to 60%; Nectar up to 50%
Currency discounts	Peloton up to $1,300 off
Financing terms	Tonal $0 down, 0% APR
Event framing	Old Navy early Black Friday messaging

Monitored text ad copy, Nov 1 to 18, 2026. Ashley and Nectar from broad retail; Peloton, Tonal and Old Navy from logged-in retail. Themes aren't market-wide shares.

Read This Carefully

- **Not product-matched.** Use the gap as an audit prompt, not proof that any listing contradicted an ad.
- **Check the whole path:** text ad, Shopping card and landing page should show the same eligible offer.

11 | AI ADVERTISING

ChatGPT Ads in Logged-In Retail Fell From About 253 to 32

Monitored prompts surfaced advertiser placements on ChatGPT and Google AI Mode in November. The two tracked ChatGPT datasets moved in opposite directions, so no category-wide trend is established.

EXHIBIT 13

Advertisers Observed in AI Answer Experiences

Examples only, from selected prompts, November 2026

ChatGPT

- CrunchLabs
- Selkirk Sport
- Flexispot
- Men's Wearhouse
- Sweetwater
- Aritzia
- ŌURA

Google AI Mode

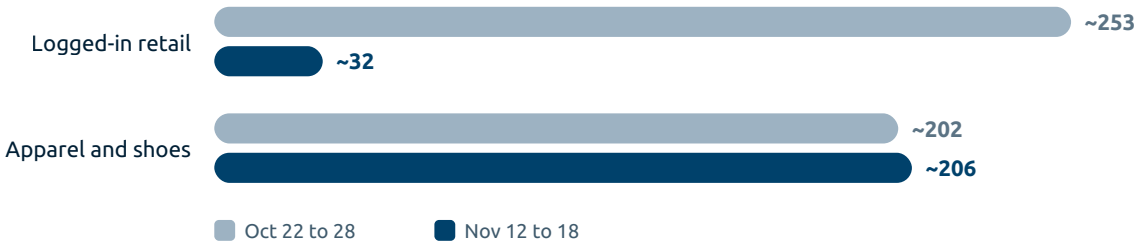
- iRobot
- Bonobos
- Lululemon
- LG
- Dyson
- Rogue Fitness
- Prada
- Zuri Furniture

Source: GrowByData Retail Industry Panel, selected ChatGPT and Google AI Mode prompts, November 2026.

EXHIBIT 14

ChatGPT: Approximate Weekly Ad Appearances

Observed ad appearances, counts not percentages



Source: GrowByData Retail Industry Panel, two monitored ChatGPT prompt datasets, Oct 22 to 28 vs Nov 12 to 18, 2026.

Interpret Carefully

- **Opposite directions.** Logged-in retail dropped to about 32 weekly appearances while apparel and shoes held near 202 to 206.
- These are tracked prompts, not measures of reach or spend.
- **Track AI separately.** AI answer ads don't follow Google SERP ad trends.

12 | WHAT TO DO NEXT

6 Checks to Run Between Thanksgiving and Cyber Monday

Use the pre-event findings to organize comparable event-day monitoring, not to predict outcomes.

01 **Monitor format crowding**
Record Shopping and text ad presence by search term and market.

02 **Check adjacent offers**
Compare visible listing prices and sale tags with neighboring products.

03 **Align promotional messages**
Check text ad claims, Shopping cards and product-page eligibility.

04 **Separate competitor signals**
Track new advertisers apart from higher appearance counts.

05 **Review product-title competition**
Watch when a listing title includes another brand name.

06 **Keep AI and Google separate**
Monitor ChatGPT and Google AI Mode as distinct channels.

Date	Period	What to capture
Nov 26	Thanksgiving	Presence and offer labels
Nov 27	Black Friday	Advertiser entry and discount depth
Nov 28 to 29	Weekend	Promotion persistence
Nov 30	Cyber Monday	Latest promotions and shipping labels
Dec 1	Follow-up	Repeat matched measurements

Proposed event-day capture schedule. A research plan, not an observed result.

See Your Category, Not the Average

GrowByData Compass monitors Google Shopping Ads, text ads and AI search advertising across your chosen markets and devices.

Request a demo or a BFCM competitor audit.

growbydata.com/talk-to-expert

Research boundaries: monitored keywords, prompts, markets, devices and profiles only. No year-over-year comparison, CPC, ad spend, conversions or product-matched offer discrepancy was measured.