

Paid search rules the Cyber Five

Article

Now that the dust has settled from this year's **record-breaking Cyber Five** (the five days between Thanksgiving and Cyber Monday), it's time to see how the industry's **advertising efforts** shook out, according to new research from Tinuiti.

Google's Search gains: Last year, sales attributed to Google Search ads grew sharply during the first half of November but then slowed over the Cyber Five as consumers resumed pre-pandemic holiday travel patterns.

This year, however, the opposite happened:

- Sales attributed to Google Search continued to grow throughout the week of Thanksgiving, peaking at 19% above last year on Black Friday before dipping again over the weekend.
- Cyber Monday saw another bump, settling at an 18% increase year over year.
- However, growth in average order value (AOV) has slowly declined over the past year as inflation stifled consumer spending. AOV from Google Search ads climbed just 5% over the course of the Cyber Five, down from 10% growth last year.

Going once, going twice: Throughout the third quarter, Walmart's share of Google Shopping impressions was running below 2021 levels. Though the retailer took a more aggressive stance (bidding high to start before going low) during the Cyber Five period, its shares jumped only slightly above last year.

Similar to its strategy last year, Amazon also aggressively bid on Google Shopping auctions throughout the week. And like last year, it's paying off, as the retailer's share of impressions has continued to grow since Thanksgiving.

Sponsored spotlight: Sales attributed to Amazon Sponsored Products started out 29% higher than last year on Black Friday and continued to grow over the weekend to reach 44% growth on Cyber Monday.

And cost-per-click growth for Amazon advertisers is falling, suggesting the competition that drove prices up over the last couple of years is leveling out.

The good, the bad, the Meta: Meta's cost per thousand (CPM) is also waning as ad auctions become less competitive. Over the Cyber Five, Meta's CPM was down 29% year over year across all of its properties. Facebook saw the lowest CPM, falling 37% from last year.

- Spend on Meta ads declined 3% year over year, but 49% of Tinuiti advertisers reported increasing their spend on the platform over the course of the Cyber Five.
- But there was one big winner for Meta: Reels. Reels accounted for 5.4% of all Instagram ad impressions over the Cyber Five, compared to just 0.9% last year. Meanwhile, Facebook Reels rose to 3.3% of all impressions this year from a nonexistent share last year.
- Though the format is still relatively new, it steadily gained traction in 2022.

Regaining balance: Apple's AppTrackingTransparency had an uneven impact on Apple and Android phones last year, but the effects seem to be evening out a bit.

- This year, iPhone CPMs were down only 2% compared to Android, a big improvement from last year when iPhone CPMs were 23% lower than Android.

What we predict: Paid search is the clear winner of Cyber Five, echoing a larger industry trend. We expect marketers to put more and more dollars toward paid search through 2026, when it will account for 30.0% of total media ad spending.

Meanwhile, ad spend on Meta is falling, with the exception of Reels.

Want to learn more about the role search will play in the coming years? Here are **five charts** to get you started.

This was originally featured in the eMarketer Daily newsletter. For more marketing insights, statistics, and trends, subscribe [here](#).