

PRESENTED BY **proximic** + nexxən
by comscore



The Holiday Checklist

An in-depth look at planning and
targeting trends to help inform
Holiday campaigns



✔ The **Holiday** Checklist



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nexxən



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HEAD OF PARTNERSHIPS

proximic
by comscore



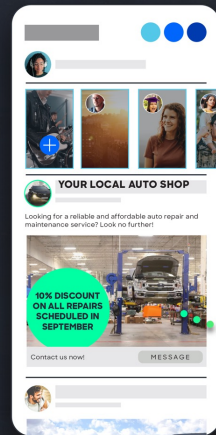
AGENDA

1



Consumer Holiday Shopping Trends

2



Media Planning Trends

3



Data and Platform Usage



COMSCORE'S PROGRAMMATIC TARGETING DIVISION

- Proximic combines Comscore's trusted datasets with a sophisticated AI-powered contextual engine to provide targeting solutions for media buyers and sellers
- Proximic's solutions are built on the principles of privacy, scale and precision, with the goal of helping drive incremental reach and efficiencies to combat signal loss

- Nexxen is an end-to-end solution that bridges new opportunities in ways others cannot.
- Wherever you stand in the ecosystem, Nexxen enriches and elevates the advertising journey; digital to Connected TV to linear, planning to activation to measurement and optimization.

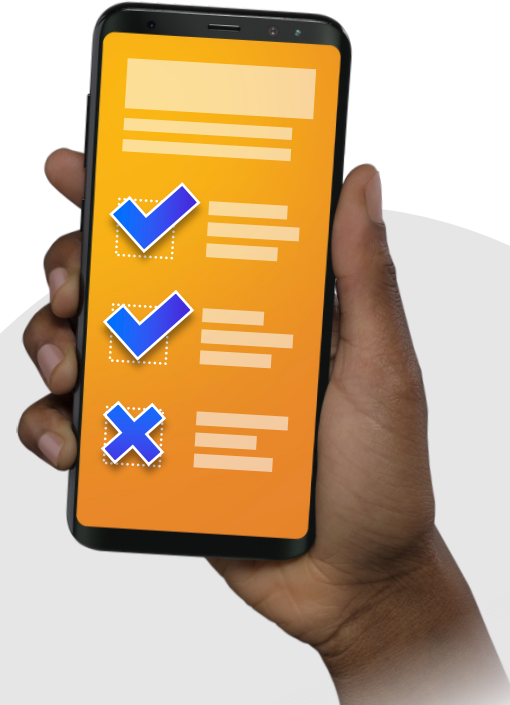


DATA SOURCES: COMSCORE DATA



Comscore Digital Commerce Data

Dollars spent online in non-travel retail categories, via desktop or mobile devices.



Comscore Industry Survey Data

All respondents manage holiday programmatic advertising budgets

Data is U.S. only



DATA SOURCES: NEXXEN DISCOVERY

WHAT IT IS

- Nexxen Discovery is a proprietary audience discovery and insights tool.
- Providing real-time analysis of over 3.4 billion content engagements and trends across the web.
- Generating actionable real-time insights for marketers.

METHODOLOGY

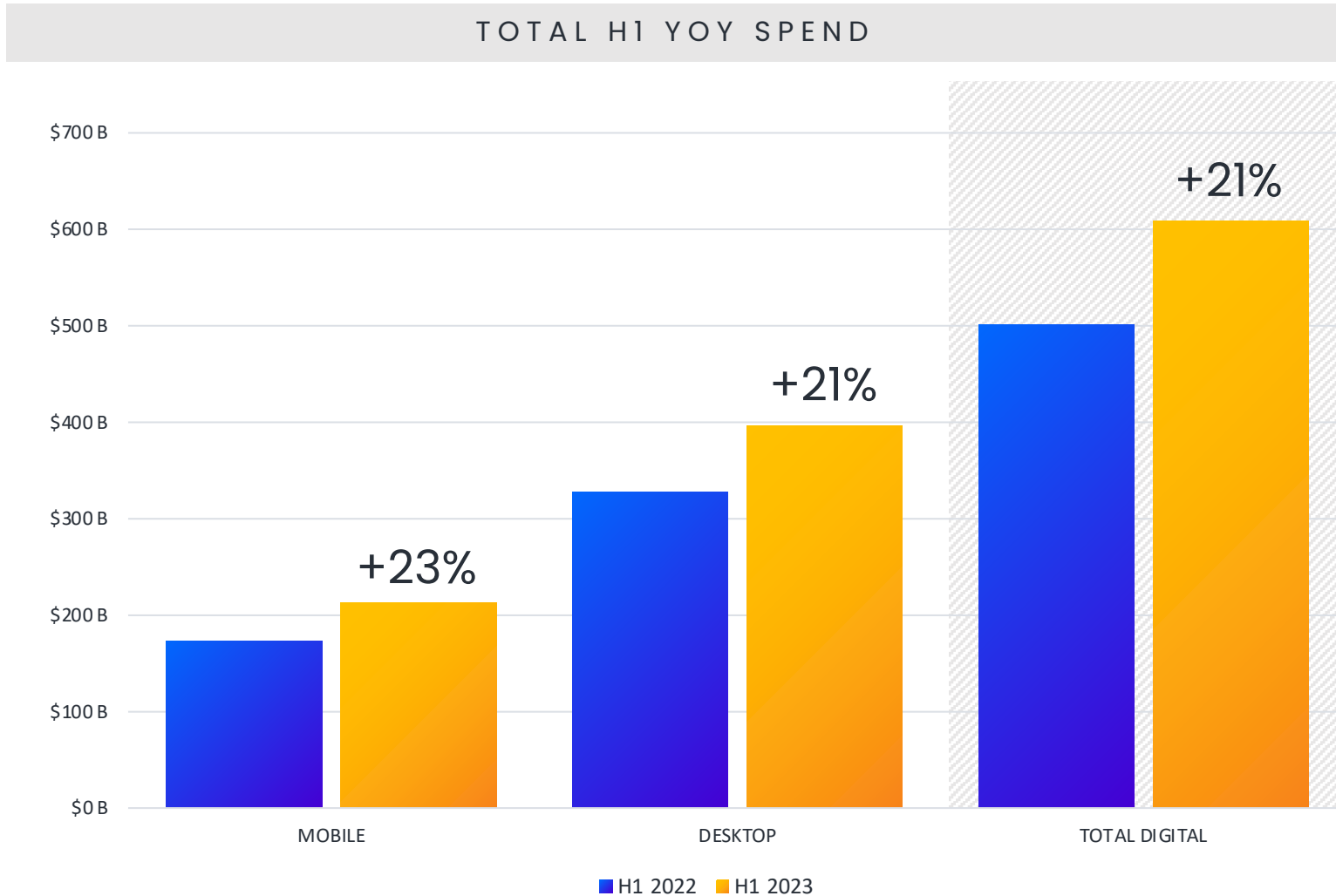
- Nexxen Discovery's technology analyzes and correlates over 3.4 billion content engagements and consumption trends across the digital ecosystem – web, video, mobile, TV, and social – every day.
- By performing a granular analysis of what people are engaging with online, we are able to determine at scale digital content engagement, trends, and sentiment around a brand, story, or audience interest.



Consumer Holiday Shopping Trends

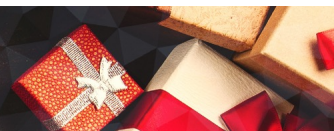


CONSUMER DIGITAL SPEND CONTINUES TO CLIMB THIS YEAR



Despite concerns around a recession and rising inflation costs, **consumer digital spend shows significant gains of +21%** compared to the same time last year

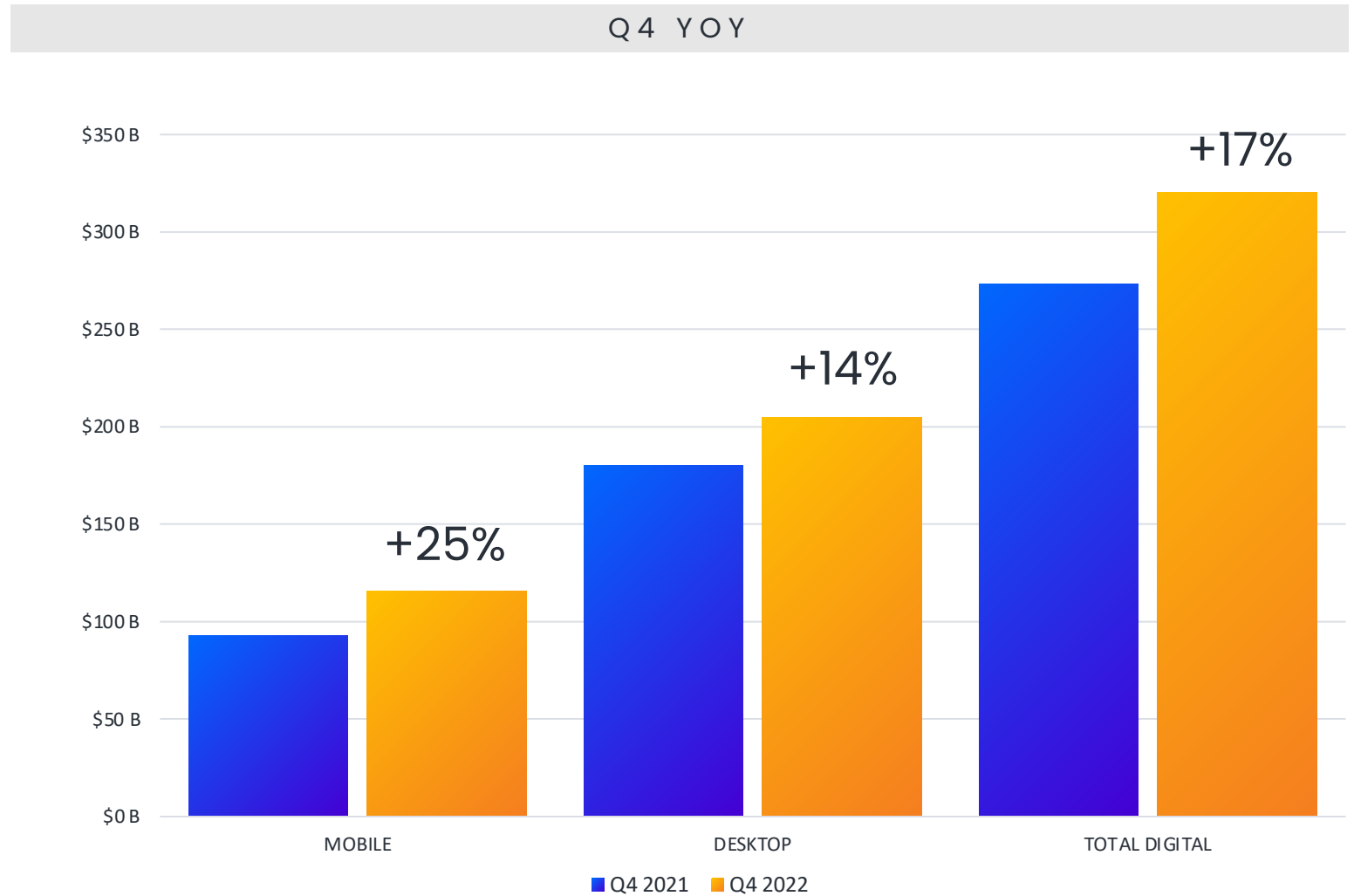
Source: Comscore Total Digital, Q1 2022 – Q2 2023, U.S.



Q4 2023 CONSUMER SPEND EXPECTED TO SHOW YOY GROWTH, WITH MOBILE PURCHASES GAINING TRACTION

YoY Q4 consumer spend growth shows no signs of stopping.

2023 Q4 growth is expected to make significant gains vs. '22 with mobile growth leading the pack.



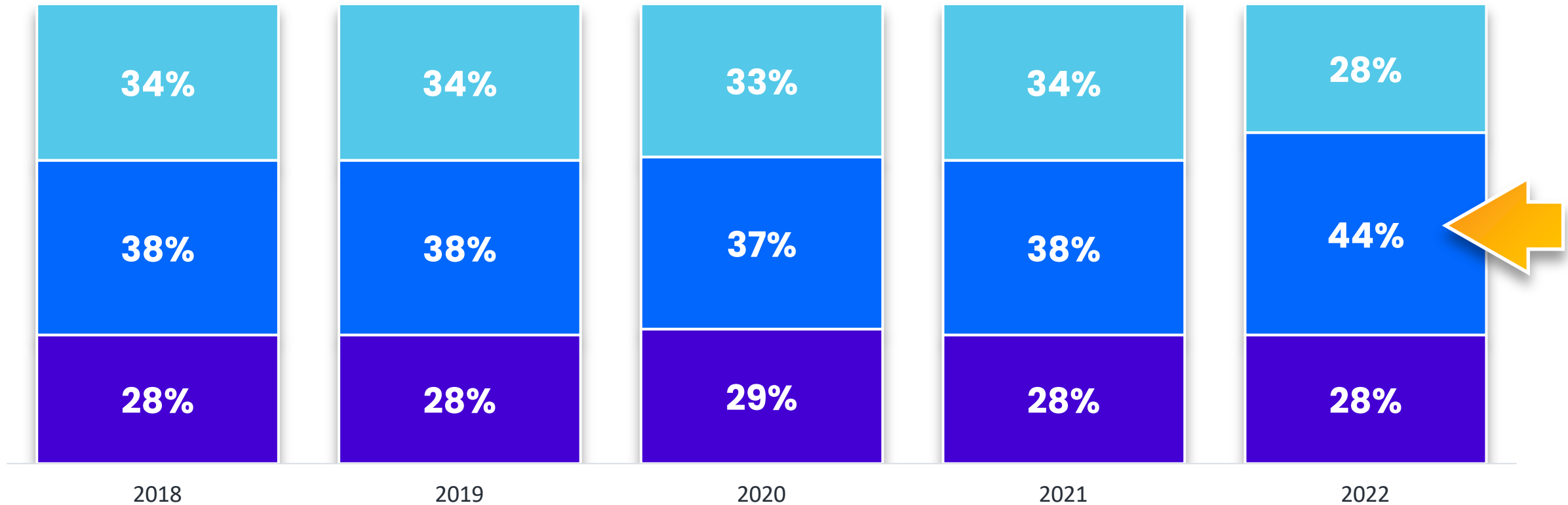
Source: Comscore Total Digital, Q4 2021 – Q4 2022, U.S.



AS RETAILERS CONTINUE TO PUSH EARLY PROMOTIONS, NOVEMBER GAINED SIX PERCENTAGE POINTS OF SPENDING SHARE

MONTHLY SHARE OF QUARTERLY CONSUMER SPENDING (TOTAL DIGITAL)

DECEMBER NOVEMBER OCTOBER

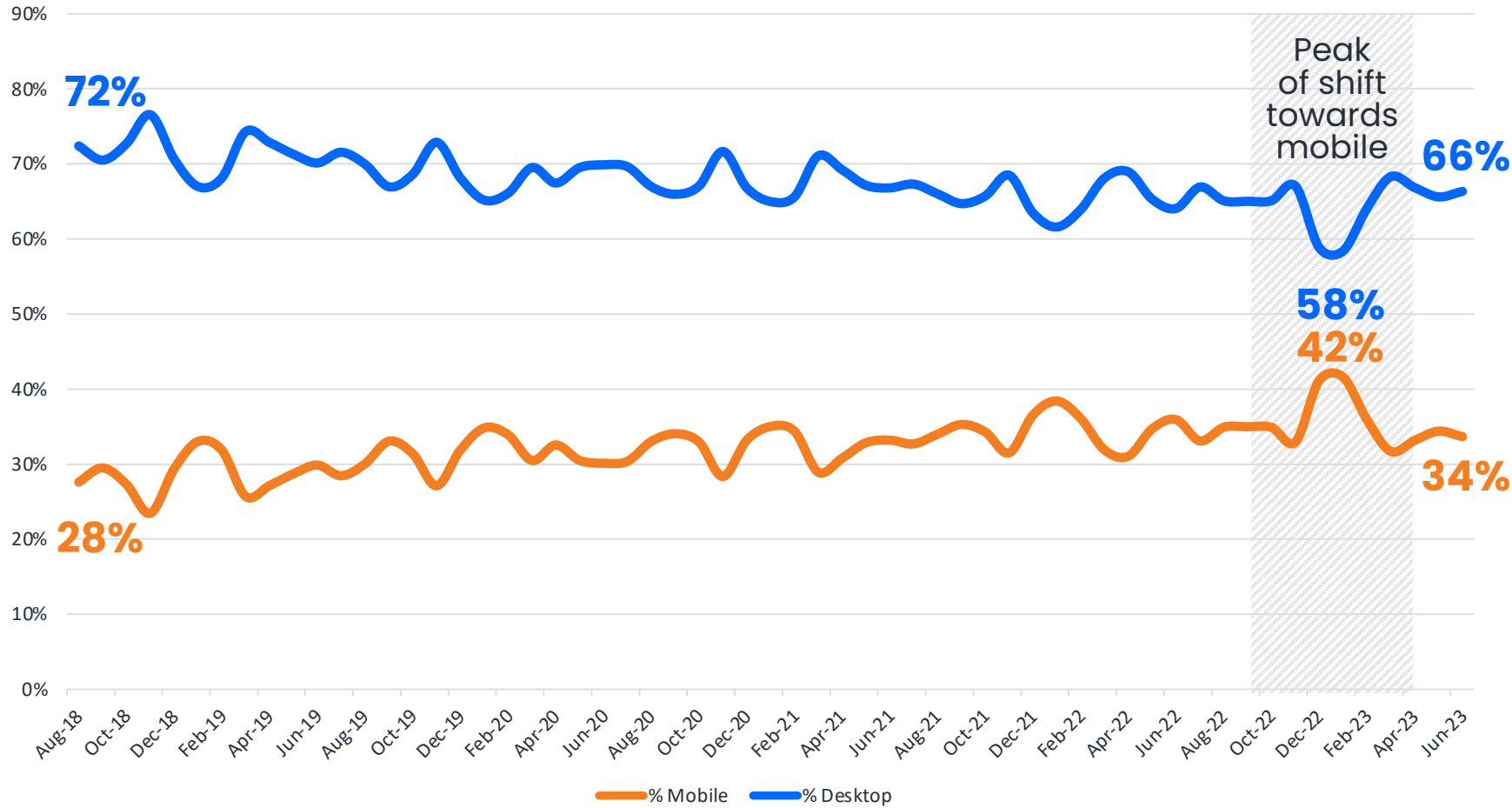


Source: Comscore Digital Commerce Measurement, U.S., Q4 2018-2022



CONSUMER SPEND ON DESKTOP VS. MOBILE ON A COLLISION COURSE, WITH KEY MOBILE SPIKES DEC-FEB EACH YEAR

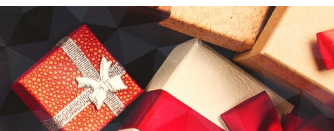
SHARE OF DESKTOP VS. MOBILE SPEND OVER TIME



Check-point

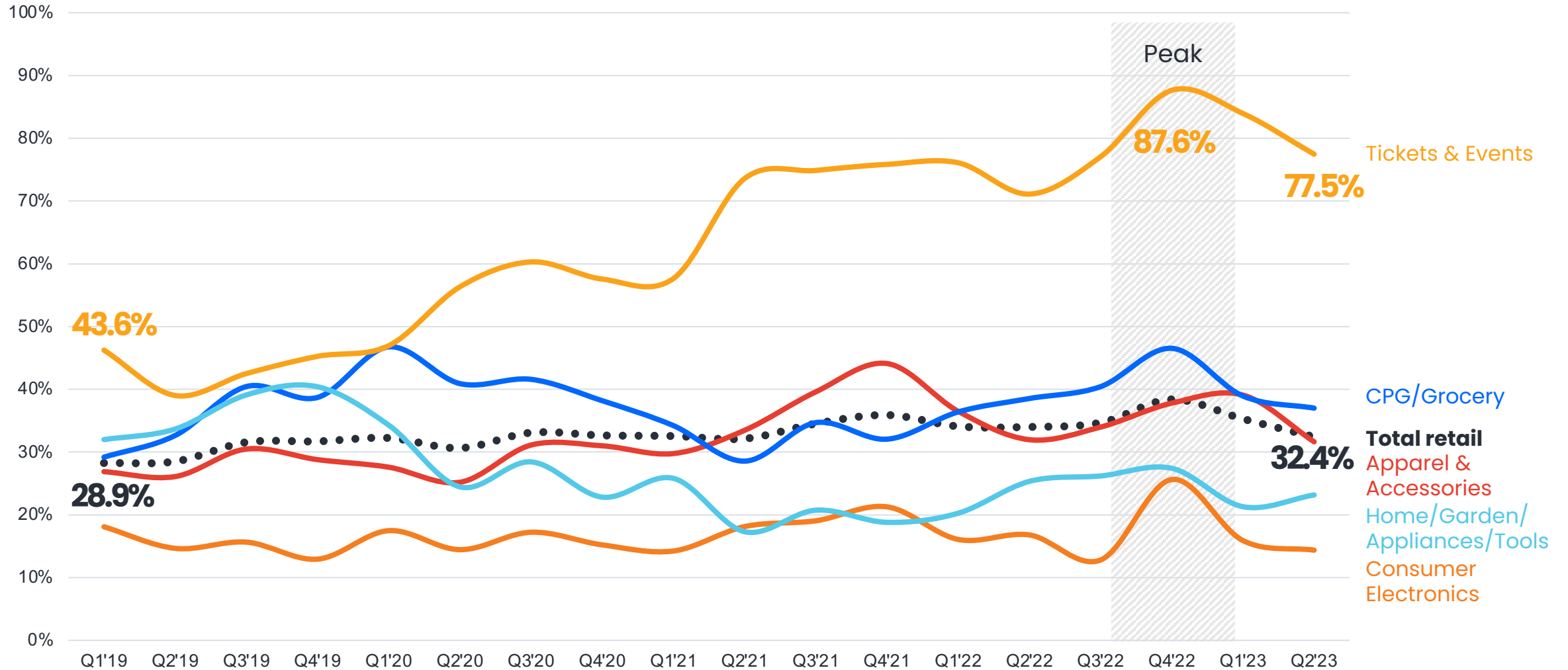
- ✓ **Ensure** you have a mobile ecommerce strategy with a website and checkout optimized for mobile devices
- ✓ **Invest** in your mobile advertising strategy with seamless cross-device targeting tactics and ad formats that make it easy to engage with your brand and complete your desired action (sale, lead gen)

Source: Comscore Total Digital, Q3 2018 – Q2 2023, U.S.

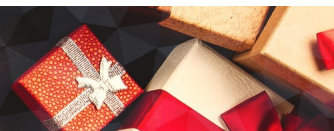


TICKETS & EVENT NOW PURCHASED PRIMARILY ON MOBILE DEVICES, HITTING A PEAK OF 87.6% IN Q4 2022

Share of category spend on mobile devices



Source: Comscore Total Digital, Q1 2019 – Q2 2023, U.S.



FOR DESKTOP HOLIDAY SPENDING, APPAREL & ACCESSORIES RISES TO TAKE THE #1 SPOT, WHILE ON MOBILE, EVENT TICKETS LEAPS 4 SPOTS

Numbers in () below indicate change in rank vs. Q4 '21

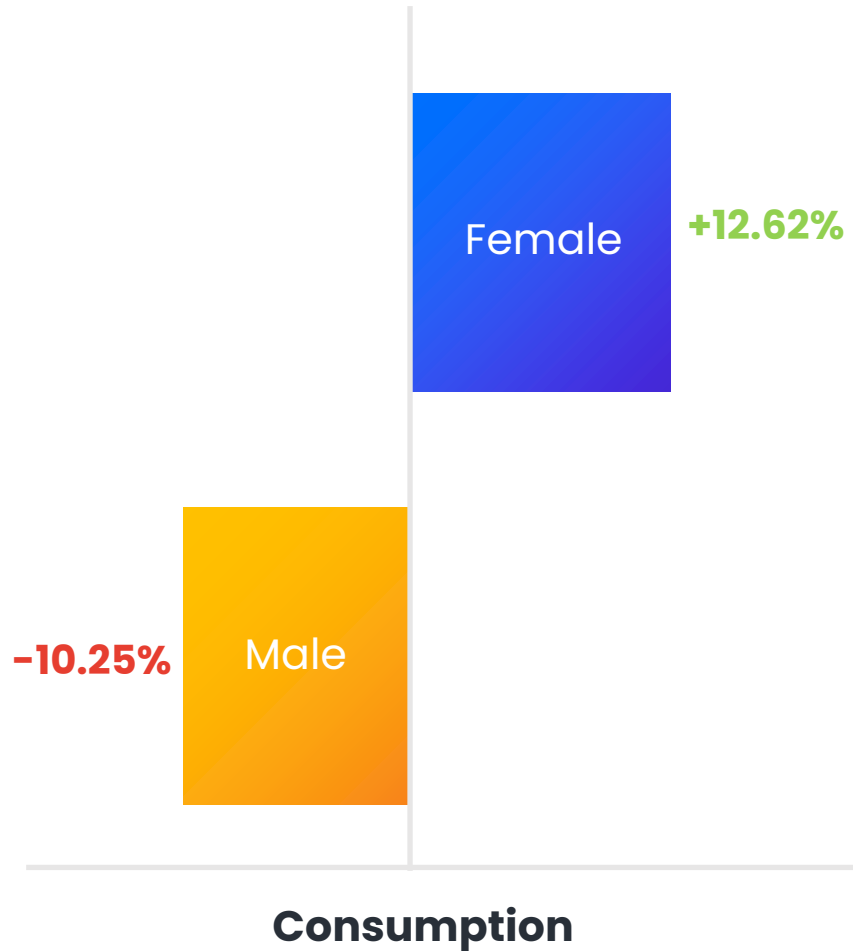
TOP 10 CATEGORIES Q4 '22 (DESKTOP SPEND)				TOP 10 CATEGORIES Q4 '22 (MOBILE SPEND)			
Apparel & Accessories	(+2)	1		Consumer Packaged Goods (Food, Baby, Pet)			
Consumer Packaged Goods (Food, Baby, Pet)	(-1)	2		Apparel & Accessories			
Computers / Peripherals	(+1)	3		(+1) Toys & Hobbies			
General Services (photo printing, shipping, etc.)	(+2)	4		(+4) Event Tickets			
Consumer Electronics		5		(-2) Computers / Peripherals			
Digital Content & Subscriptions	(+3)	6		(-1) Digital Content & Subscriptions			
Furniture, Appliances & Equipment	(-5)	7		Furniture, Appliances & Equipment			
Home & Garden	(-1)	8		(-2) Consumer Electronics			
Office Supplies	(-1)	9		(+2) Video Games, Consoles & Accessories			
Books & Magazines	(+2)	10		(-1) Jewelry & Watches			

Source: Comscore Total Digital, Q4 2021 – Q4 2022, U.S.

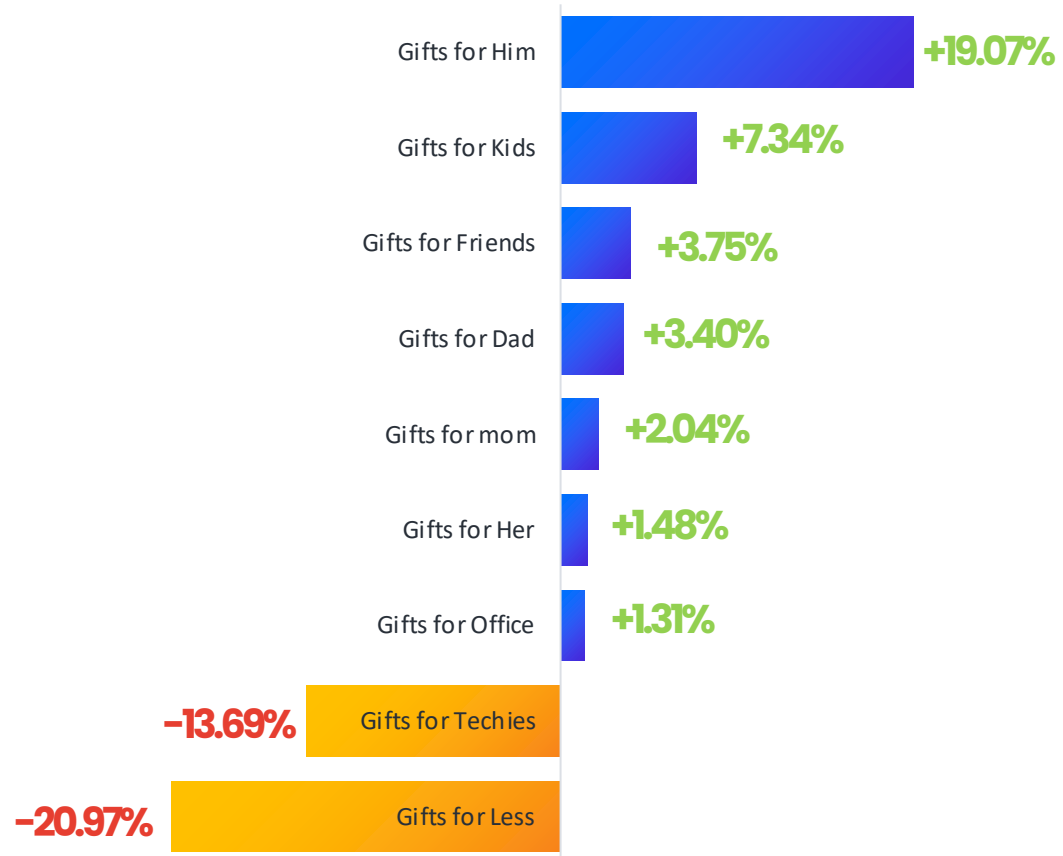


HOLIDAY SHOPPERS SKEWED MORE FEMALE, MORE LIKELY TO BE SHOPPING FOR 'HIM' AND 'THE KIDS'

HOLIDAY SHOPPER | GENDER SKEW



HOLIDAY SHOPPER | GIFT RECIPIENT



✓ **Consider** who will be making the majority of the holiday purchases in your targeting tactics

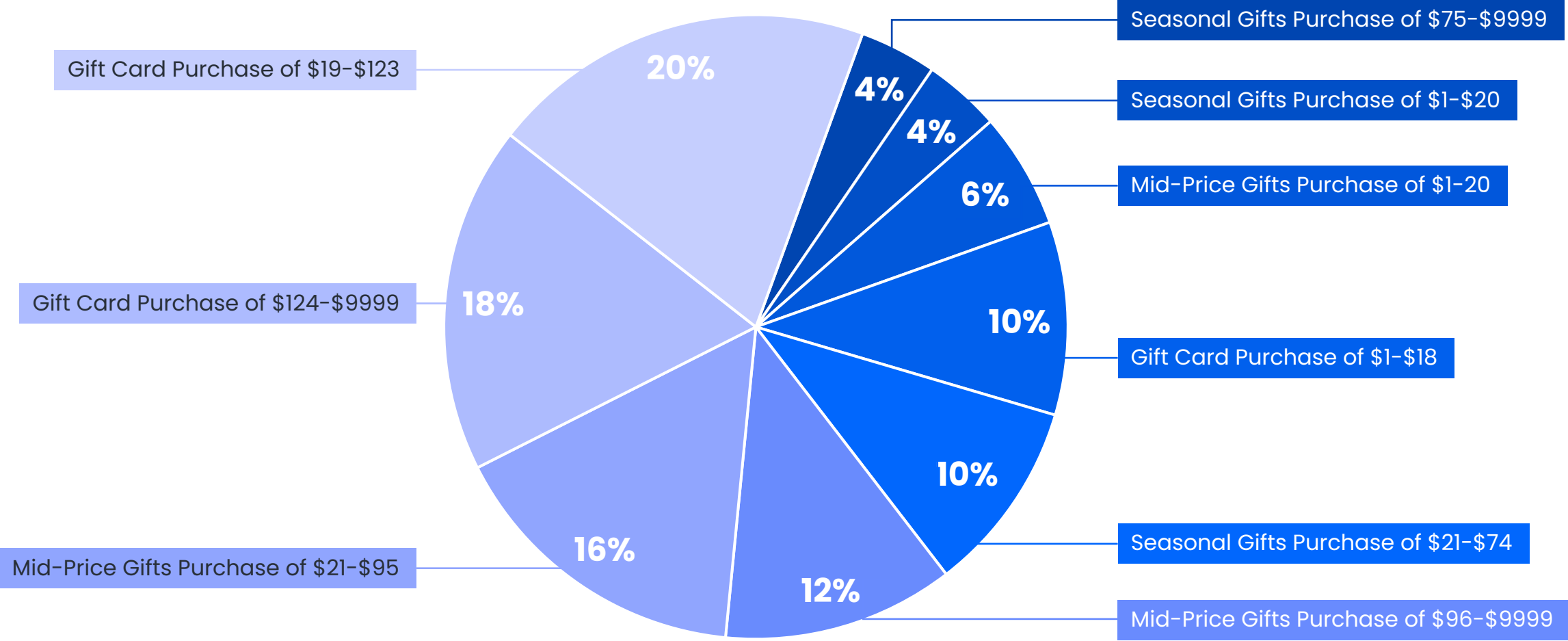
Source: Nexxen, 2022, Proprietary Discovery Platform Data



GIFT CARDS TOP THE RANKS AS MOST COMMON HOLIDAY GIFT

Typical price range for holiday gift giving between \$21 - \$125

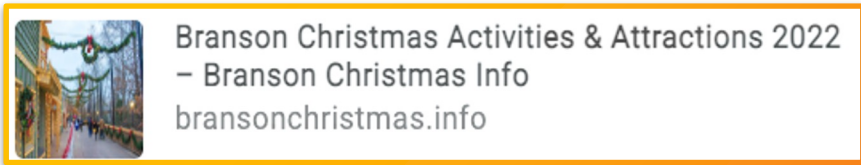
HOLIDAY SHOPPERS | MOST COMMON GIFTS AND VALUES



Source: Nexxen, 2022, Proprietary Discovery Platform Data

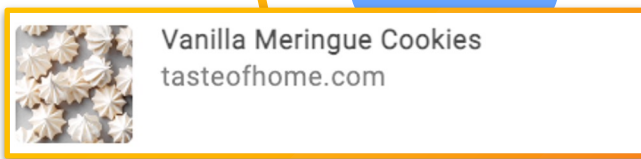


CONSUMERS LEAN HEAVILY INTO FAVORITE HOLIDAY TRADITIONS



Branson Christmas Activities & Attractions 2022
– Branson Christmas Info
bransonchristmas.info

Example of content discovered

Vanilla Meringue Cookies
tasteofhome.com

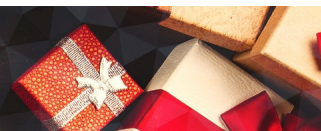


NEWS: Mickey's Very Merry Christmas Party
Coming BACK to Disney World – DATES...
disneyfoodblog.com



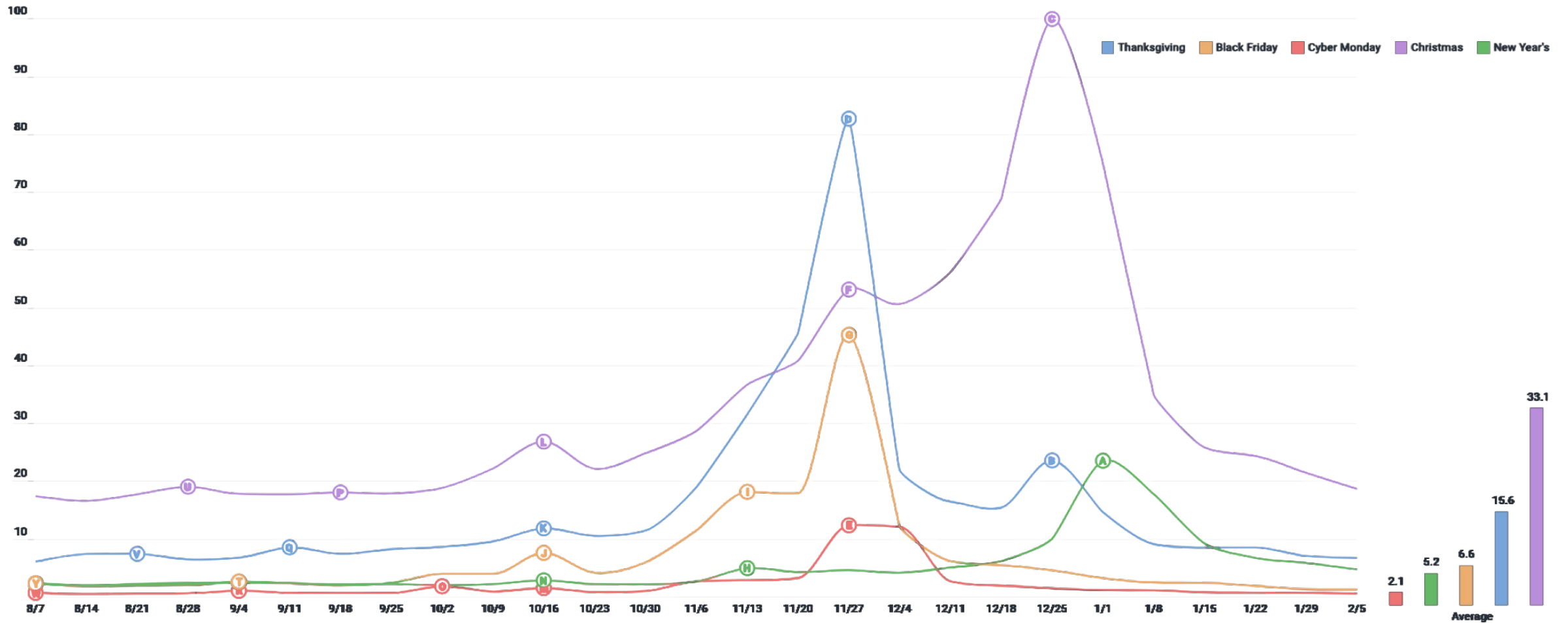
- ✓ **High engagement observed** with Walt Disney World and holiday baking content across web, video, mobile, TV and social
- ✓ **There is an opportunity** to capitalize on these trends both contextually and with audience-based targeting
- ✓ **Consider** using these holiday interests to help shape creative messaging

Source: Nexxen, 2022, Proprietary Discovery Platform Data

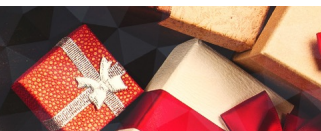


HOLIDAY SEASON ENGAGEMENT BEGINS IN SEPTEMBER

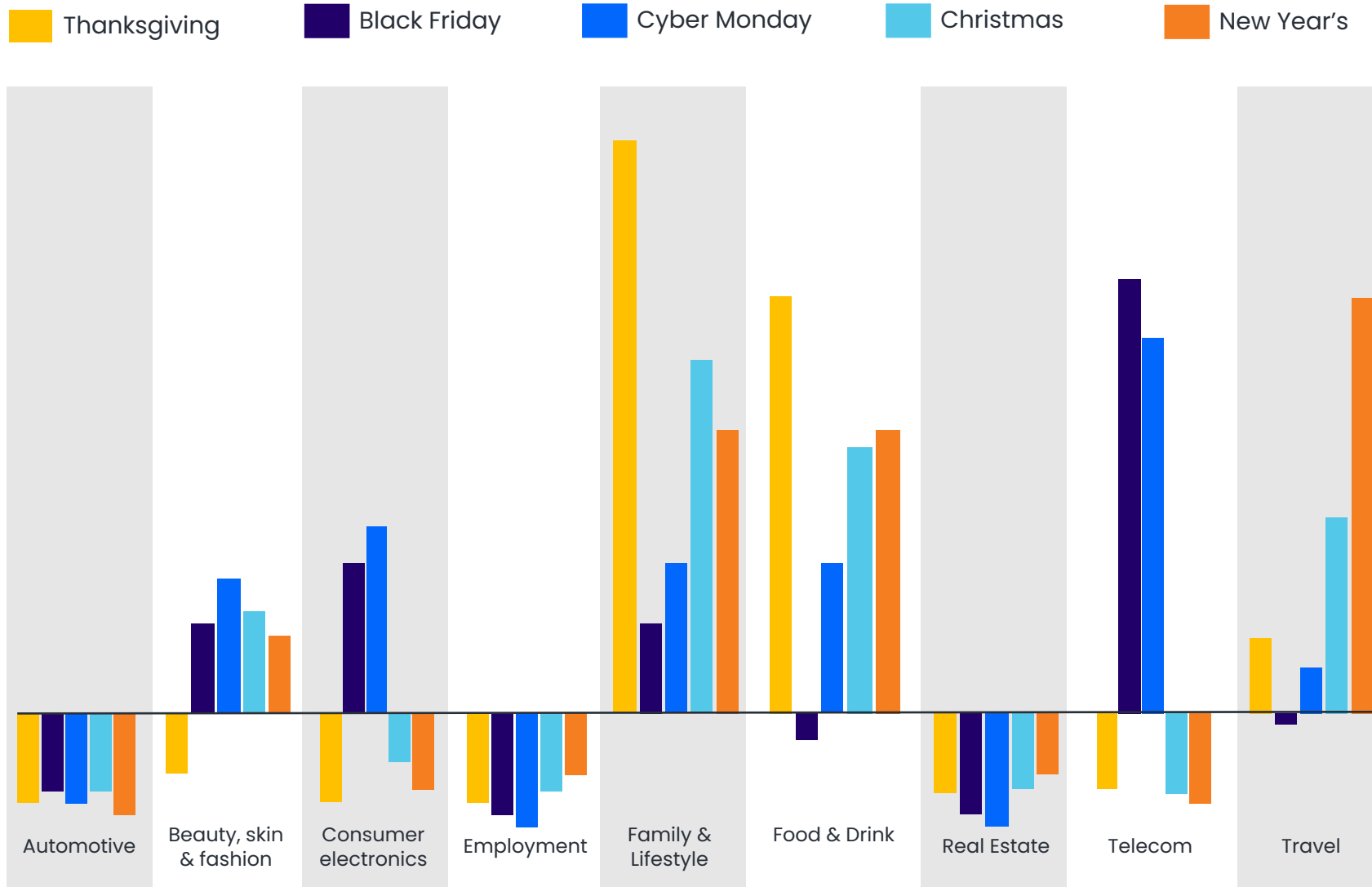
BLACK FRIDAY & CYBER MONDAY SEE LARGEST SPIKE IN ENGAGEMENT DUE TO INTEREST IN "BEST DEALS" LISTS ON MULTIPLE TECH SITES



Source: Nexxen, 2022, Proprietary Discovery Platform Data



HOLIDAY SEASON ENGAGEMENT FOCUSES ON FAMILY, TECH PRODUCTS



- **Families** are searching for baby/toddler discounts during Black Friday Cyber Monday time periods.
- **Consumer focus** is on telecom, consumer electronics, tech, and computing content as well as deals for Black Friday and Cyber Monday.



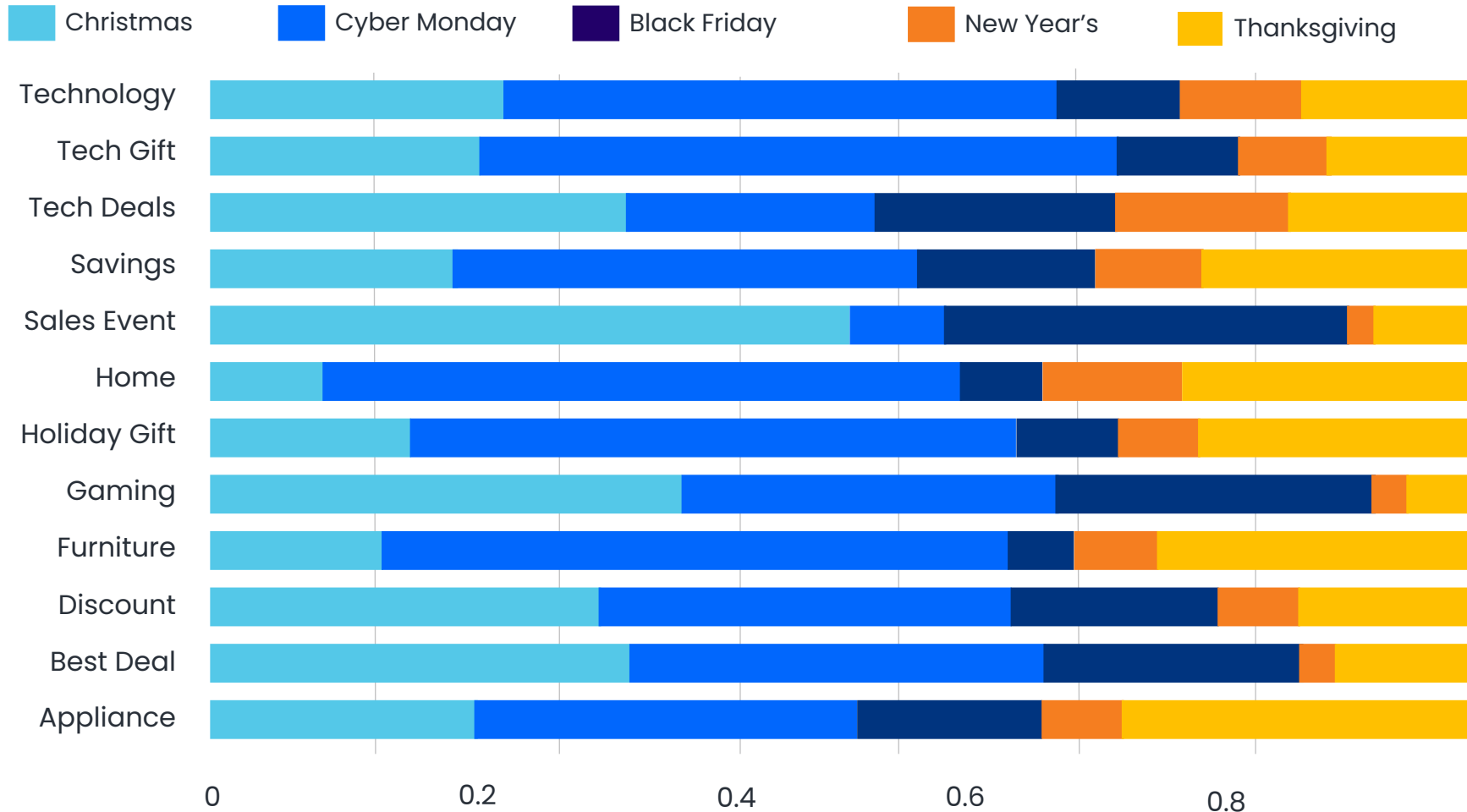
- ✓ **Tech and home categories have the largest SoV** during Black Friday and Christmas seasons
- ✓ **Leverage** these correlations between verticals and their holiday associations to proactively plan your campaign timing accordingly

Source: Nexxen, 2022, Proprietary Discovery Platform Data



BLACK FRIDAY & CYBER MONDAY HAVE STRONGEST HOLIDAY ASSOCIATION WITH TECH GIFTS

SHARE OF VOICE BY HOLIDAY AND VERTICAL



Check-point

- ✓ **Tech and home categories have the largest SoV** during Black Friday and Christmas seasons
- ✓ **Leverage** these correlations between verticals and their holiday associations to proactively plan your campaign timing accordingly

Source: Nexxen, 2022, Proprietary Discovery Platform Data



AMAZON PRIME DAY DOMINATES CYBER HOLIDAY SOV

Amazon Prime Day dominates cyber holiday share of voice at **56%** in comparison to Black Friday and Cyber Monday.

Consumers Focus On Tech Deals For Holiday

When it comes to holiday shopping, consumers are looking at the best deals they can get on the latest technology.

Interior Upgrades Are On The Wish List

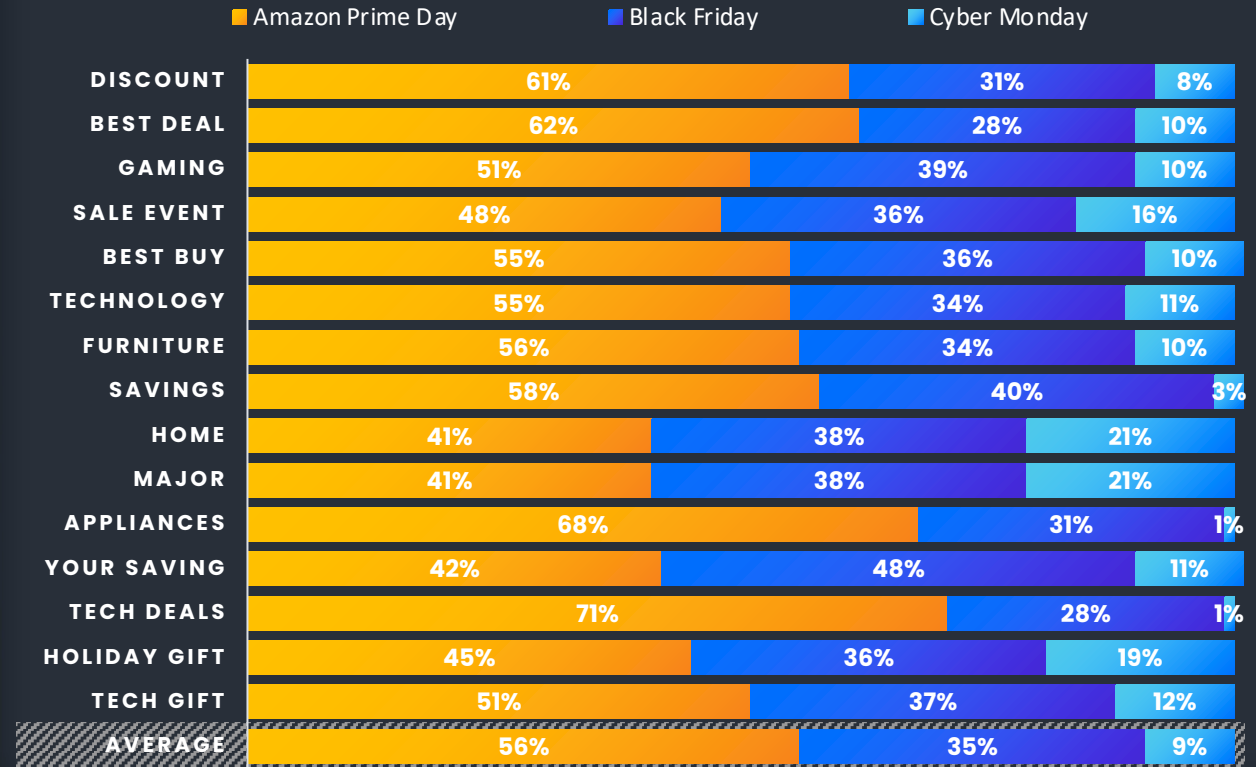
Furniture and appliances are highly consumed alongside Amazon Prime Day suggesting consumers are taking advantage of holiday shopping deals to upgrade their homes.

Check-point

✓ Plan to start holiday promotions and budgets early

✓ Brands have the opportunity to **contextually align with users** completing their holiday gift shopping online

CYBER HOLIDAY ASSOCIATIONS



Source: Nexxen, 2022, Proprietary Discovery Platform Data

Media Planning Trends

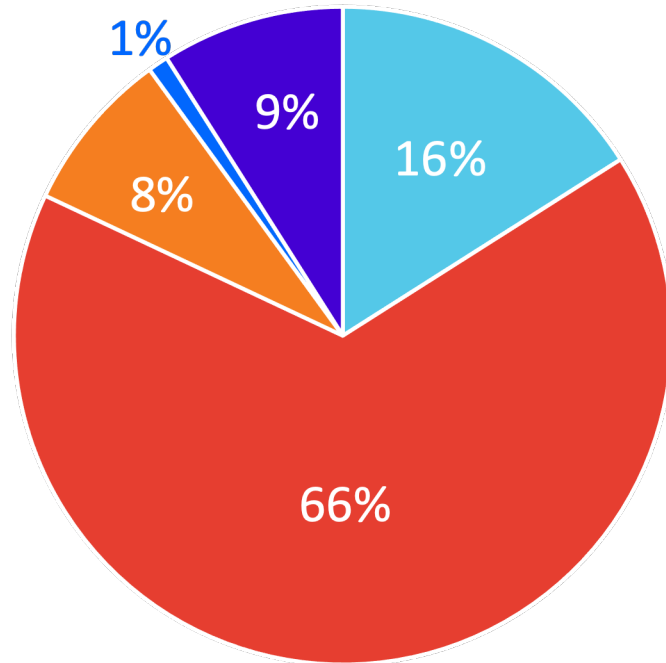


DATA SOURCES: COMSCORE DATA

COMSCORE INDUSTRY SURVEY

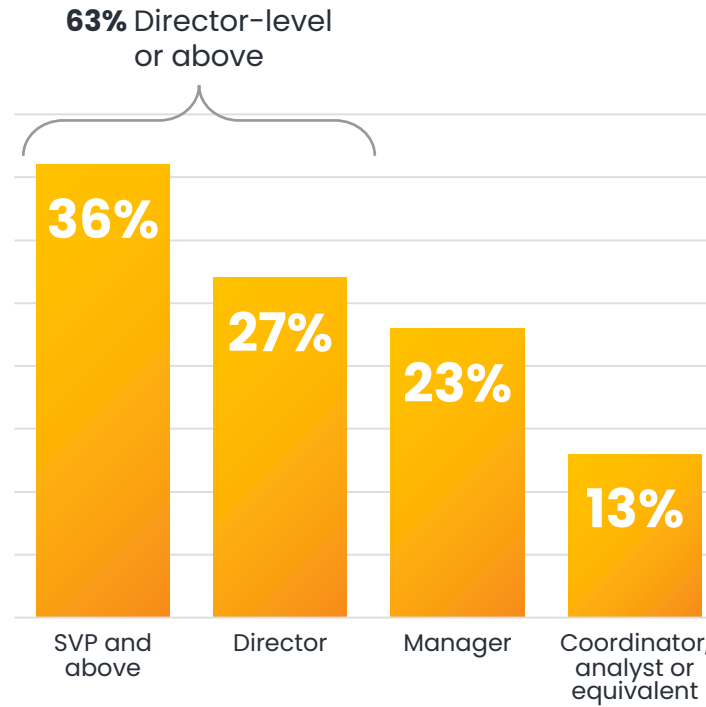
All respondents manage programmatic holiday advertising budgets

COMPANY NAME



■ Advertiser
 ■ Agency
 ■ Publisher
■ Technology
 ■ Other

TITLE



Respondents have

19

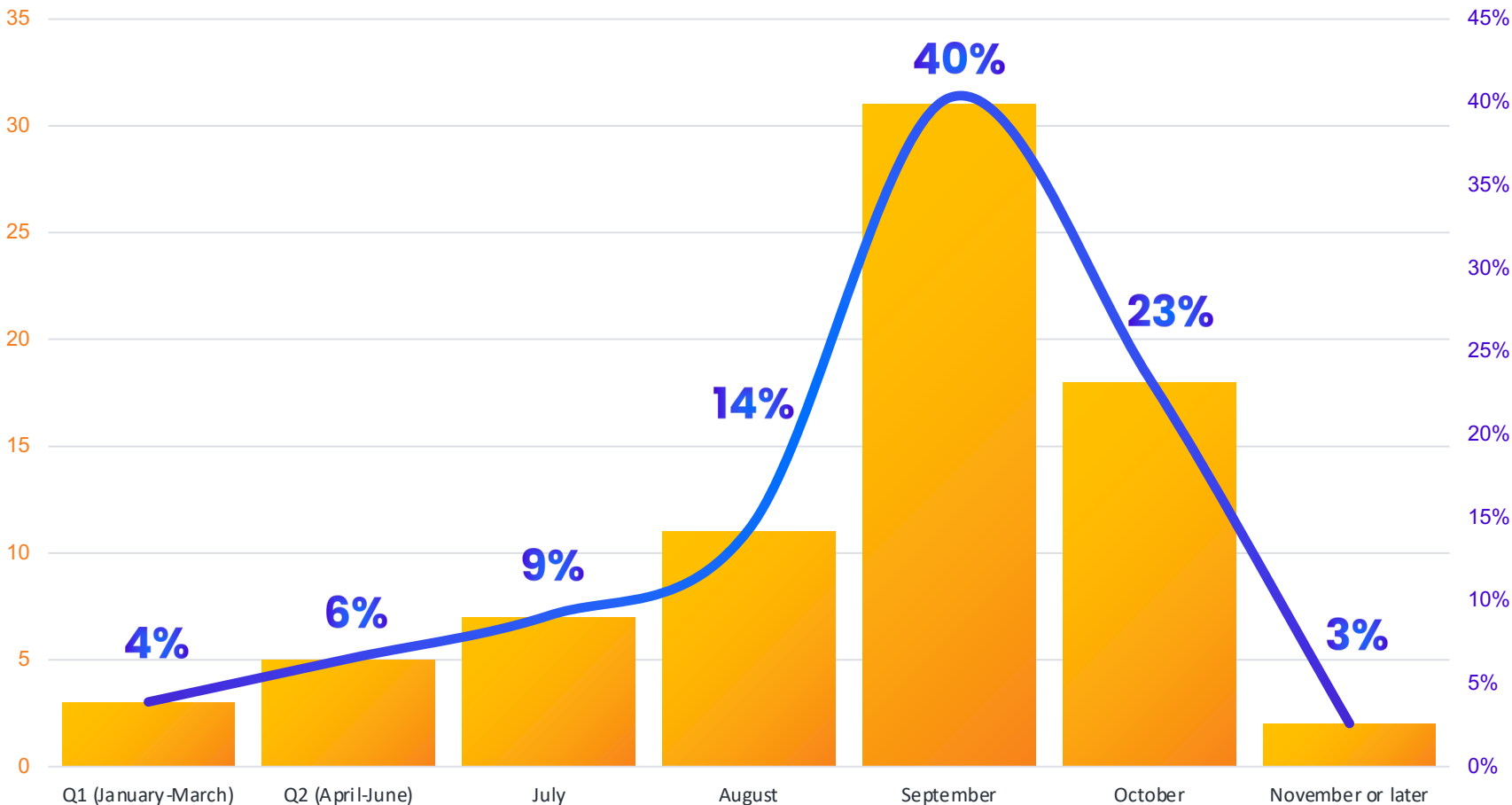
years of experience on average

Source: Comscore Custom Survey, "Holiday Checklist", Age 18+, August 2023, U.S.



MOST HOLIDAY MARKETING BUDGETS ARE LOCKED IN WELL BEFORE PEAK SHOPPING BEINGS

DURING WHICH MONTH DO YOU FINALIZE PLANNING FOR HOLIDAY MARKETING CAMPAIGNS?



97%

of holiday budgets are set in stone by October

Nearly 75%

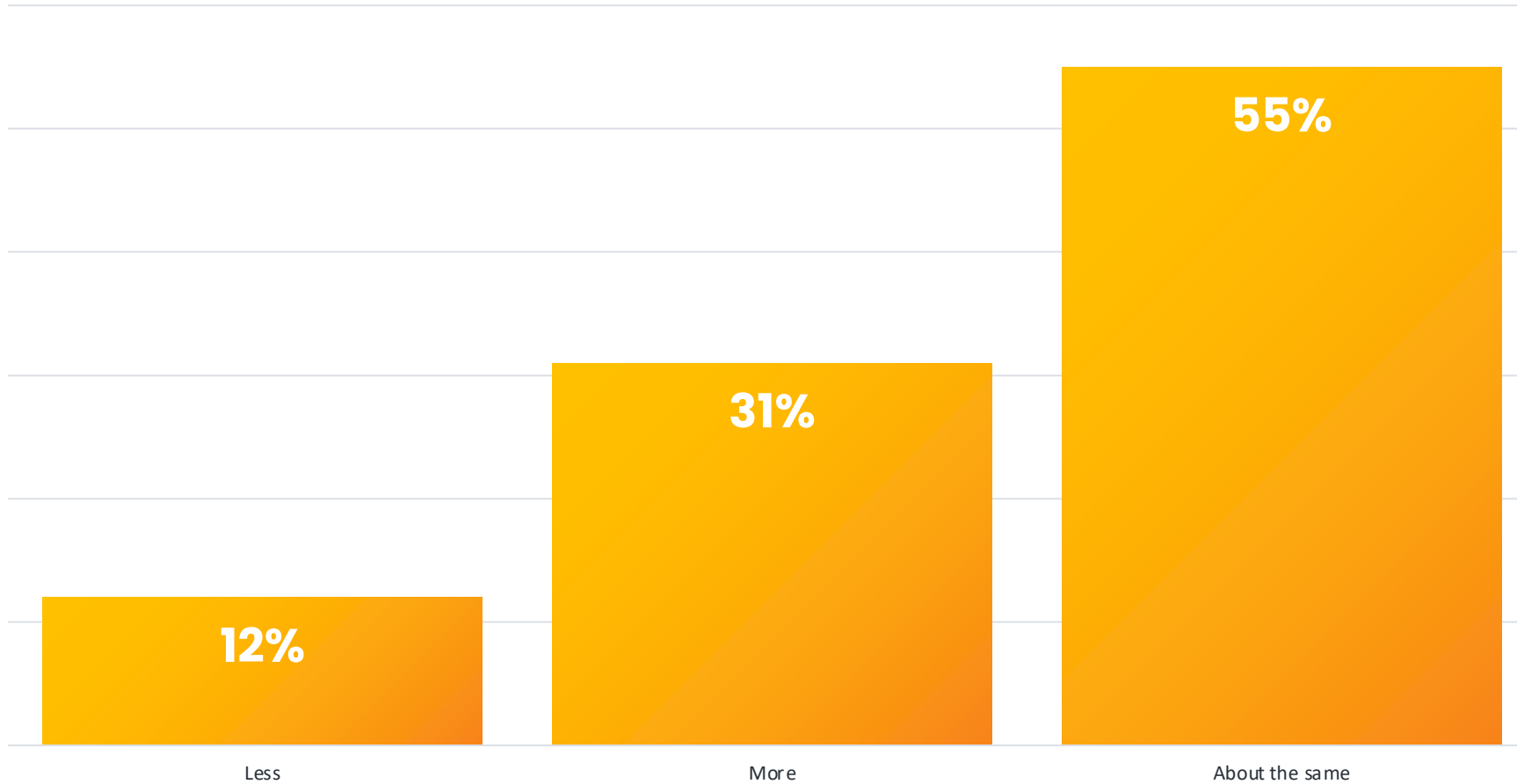
are locked in by September

Source: Comscore Custom Survey, "Holiday Checklist", Age 18+, August 2023, U.S.



WHAT RECESSION? ADVERTISING SPEND GROWTH SHOWS NO SIGNS OF SLOWING

DO YOU EXPECT TO ALLOCATE MORE, LESS OR ABOUT THE SAME SPEND ON ADVERTISING THIS YEAR COMPARED TO LAST YEAR'S HOLIDAY SEASON?



86%

of marketers plan to spend **the same or more** on holiday advertising compared to last year

Recession and inflationary concerns seemingly having little impact on marketing budgets

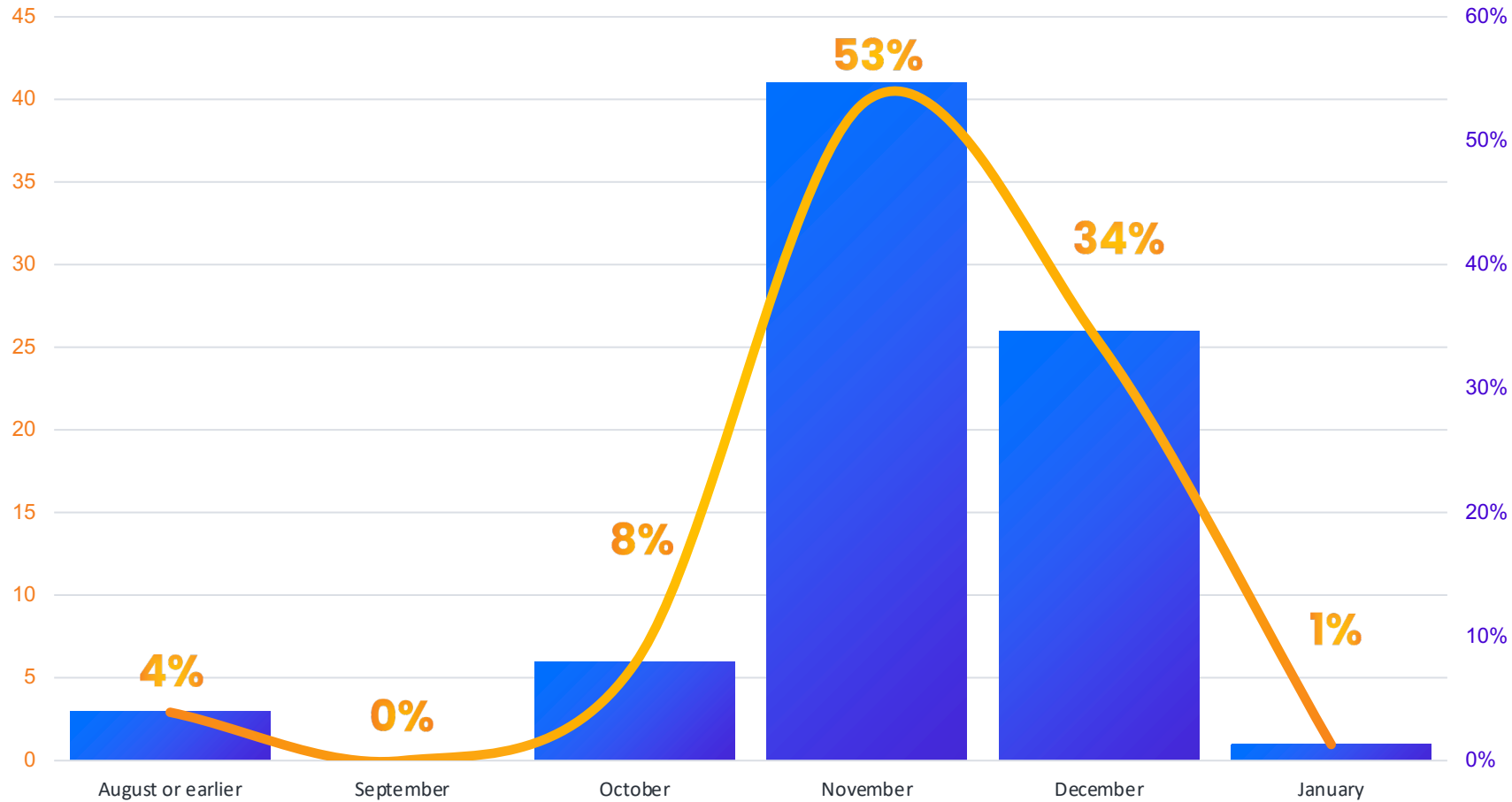
Source: Comscore Custom Survey, "Holiday Checklist", Age 18+, August 2023, U.S.



MORE THAN HALF OF ALL HOLIDAY BUDGETS ARE SPENT IN NOVEMBER

87% of holiday budgets are exhausted across November and December

IN WHICH MONTH DO YOU PLAN TO SPEND THE MAJORITY OF YOUR HOLIDAY BUDGET?



Check-point

- ✓ **Consumers are shopping earlier than ever**, but marketers are still spending the bulk of their budgets in Nov-Dec, indicating those months will be when the heaviest sales and deals are promoted.
- ✓ **Competition for consumers' attention and share of wallet will be at an all-time high** in November and December. Plan ahead of time and be ready to execute in order to remain competitive and cut through the noise.

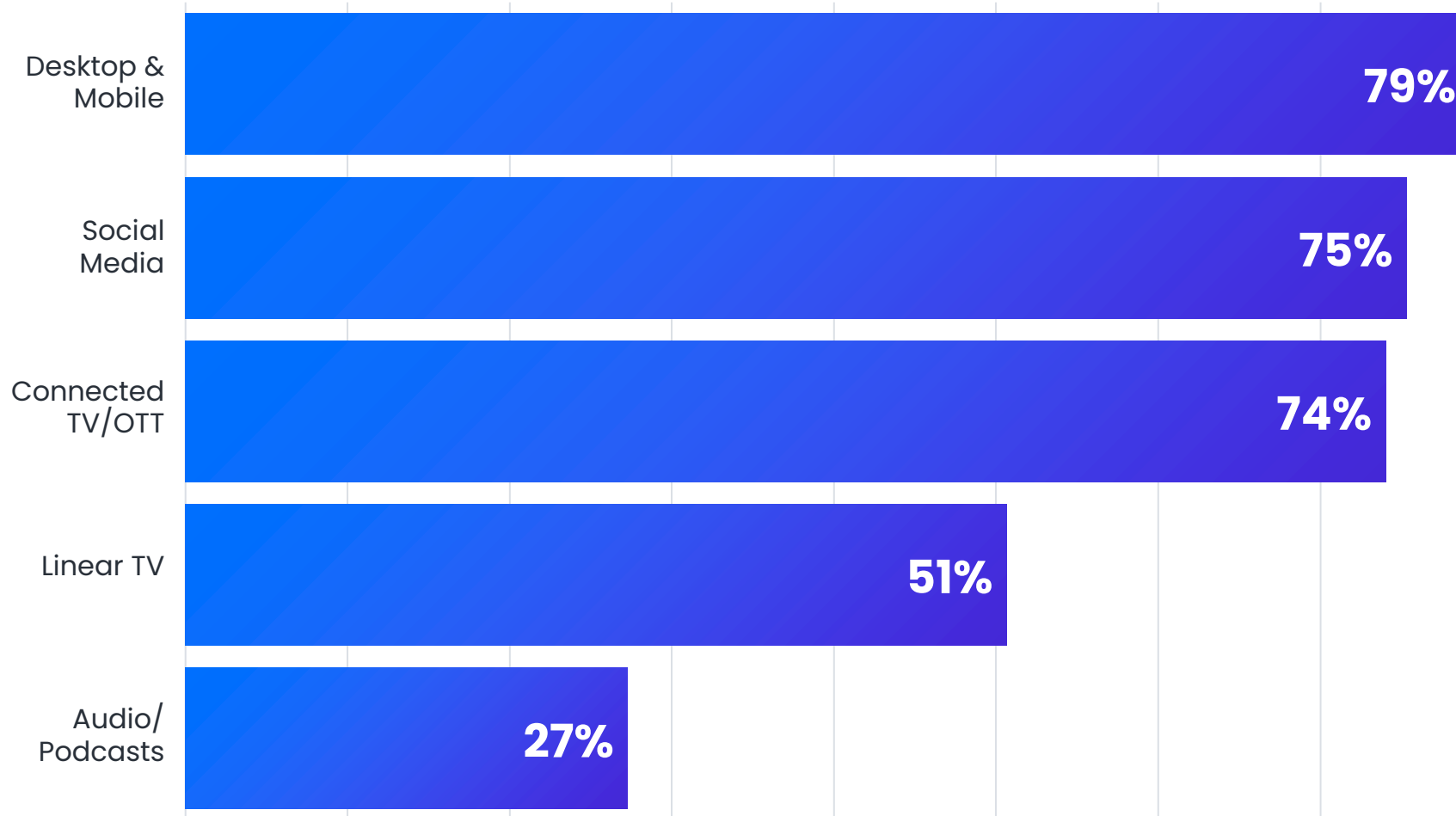
Source: Comscore Custom Survey, "Holiday Checklist", Age 18+, August 2023, U.S.



DESKTOP & MOBILE TO HOLD TOP MEDIA CHANNEL SPOT, CLOSELY FOLLOWED BY SOCIAL AND CTV

CTV to be used **1.5x** more than linear in this year's holiday media activations

MEDIA CHANNELS MARKETERS PLAN TO USE FOR HOLIDAY SEASON ADVERTISING THIS YEAR



Check-point

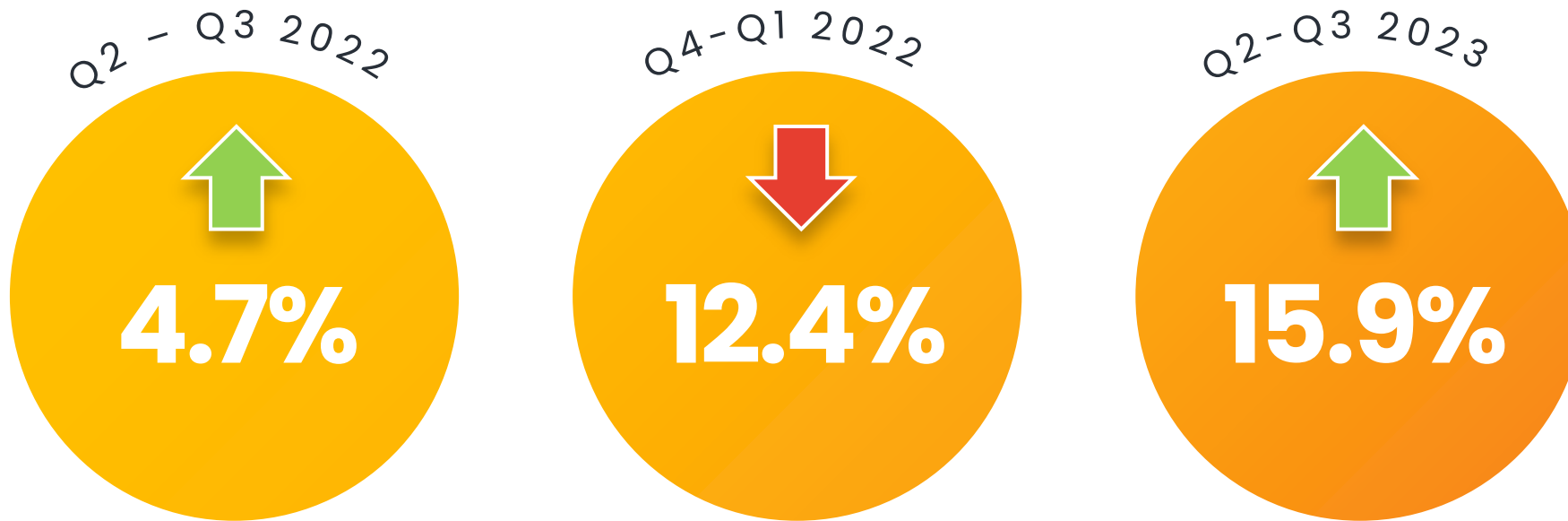
- ✓ **Deploy** an effective, cross-platform strategy to reach consumers with unified, personalized messaging wherever they consume content.
- ✓ **Go beyond** standard digital channels will be critical to make sure your brand remains top of mind for consumers this holiday season.

Source: Comscore Custom Survey, "Holiday Checklist", Age 18+, August 2023, U.S.



MARKETERS SPEND MORE ON CTV & VIDEO THAN DISPLAY FOR MOST OF THE YEAR, BUT THE TREND CHANGES IN Q4/Q1

CTV & ONLINE VIDEO vs DISPLAY SPENDING • Q2 2022 – Q2 2023



Check-point

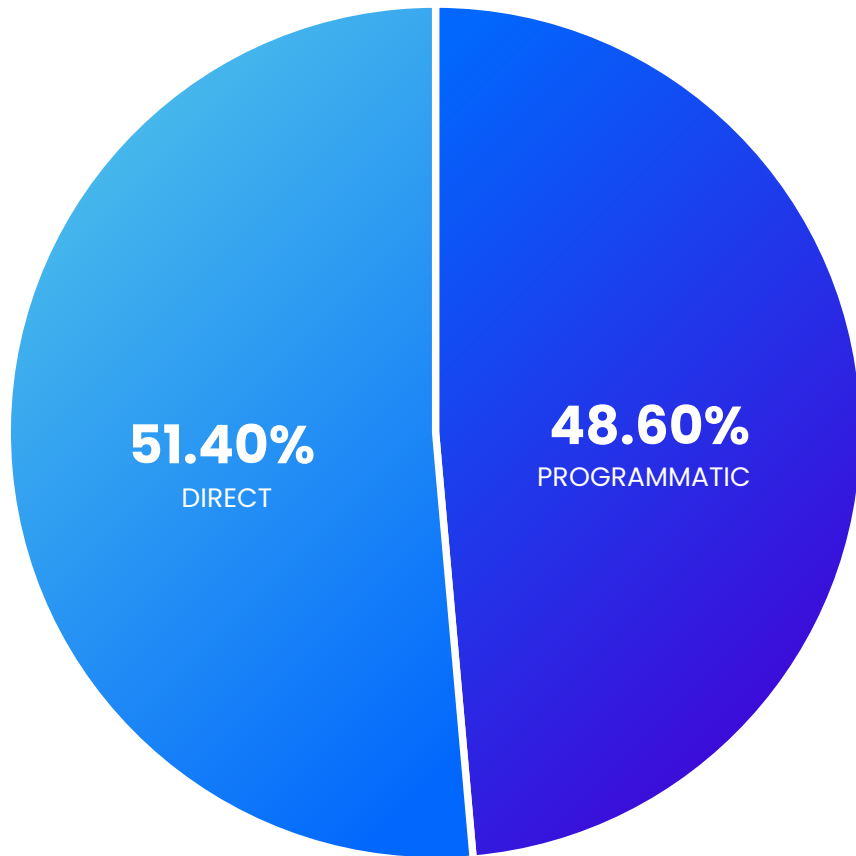
- ✓ **Consider going beyond** display as a performance solution and apply elements like QR codes or voice-to-action technology to your CTV buy.

Source: Nexxen, 2022- 2023 Proprietary Data

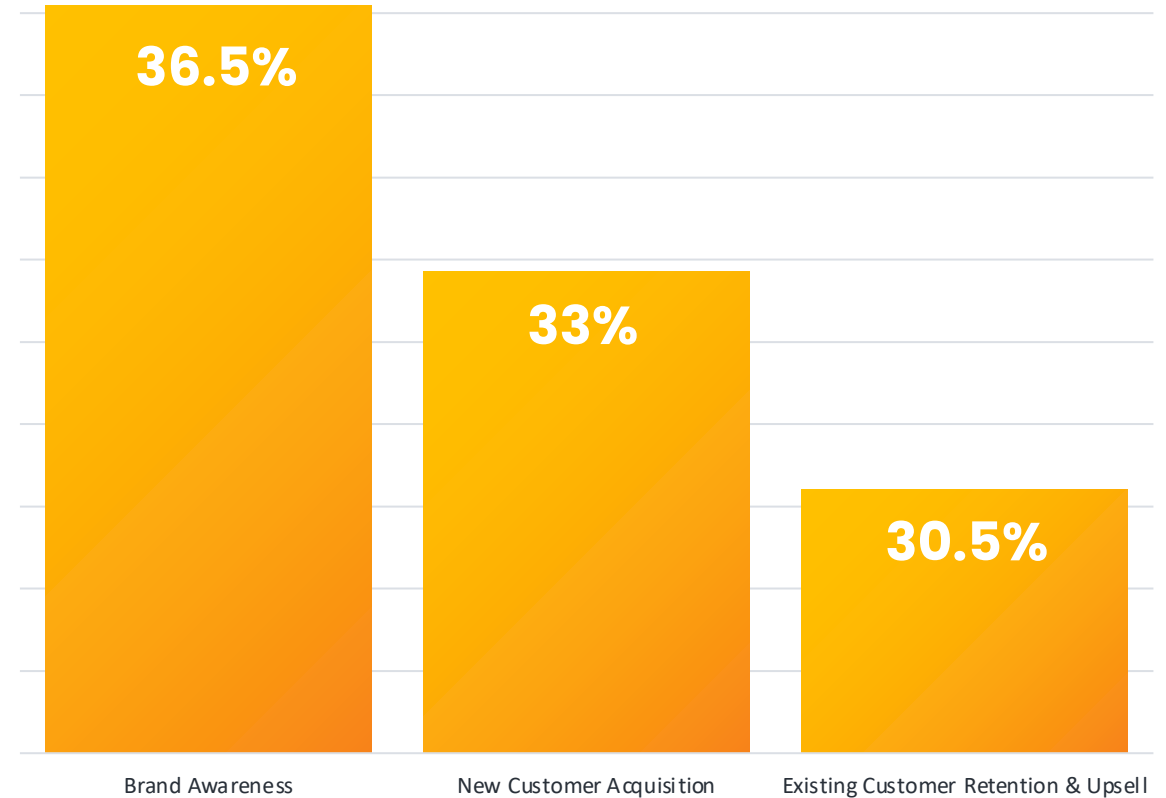


DIRECT BUYING SLIGHTLY ECLIPSES PROGRAMMATIC BUDGETS, WITH BRAND AWARENESS TACTICS COSTING MARKETERS THE MOST

HOW MUCH OF YOUR HOLIDAY BUDGET WILL BE SPENT PROGRAMMATICALLY VS. DIRECT?



HOW MUCH OF YOUR HOLIDAY BUDGET WILL BE SPENT ON THE FOLLOWING TACTICS?



Source: Comscore Custom Survey, "Holiday Checklist", Age 18+, August 2023, U.S.



ALL SIGNS POINT TO DIGITAL
So far in 2023...

YOY DIGITAL AD SPEND ROSE

↑ 8.7%

Nonlinear TV (CTV, AVOD, FAST) grew

↑ 7%
IN H1 2023

Social spend rebounded with nearly

↑ 12%

Growth in Q2 '23 compared to the previous year, lead by the rapid rise of short-form video

Traditional media spend plummeted

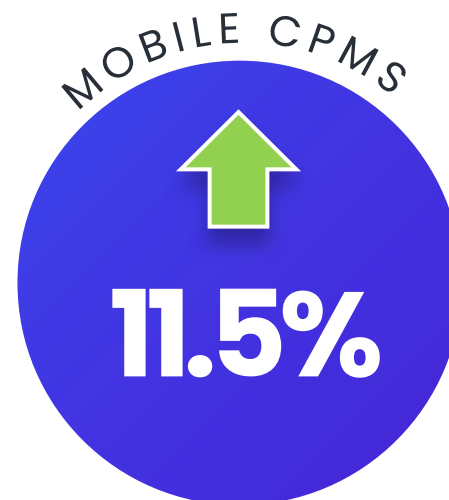
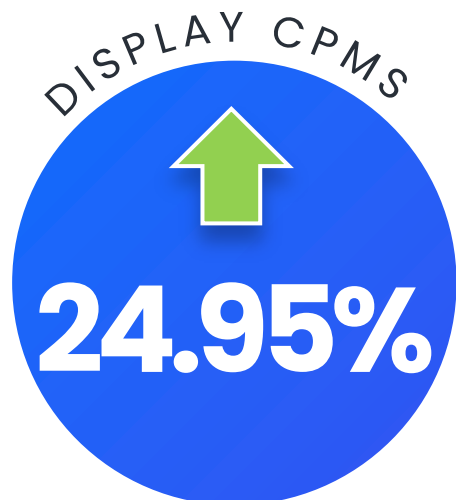
↓ 4.1%

Linear TV is expected to spike in Q4 and 2024 because local TV remains the #1 destination for political spending and Olympic spending (in '24)

[Magna forecasting](#), 2024 ad spend forecast



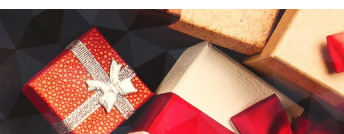
CPMS IN Q4 2022 SHOWED SIGNIFICANT INCREASE OVER Q1-Q3, WITH DISPLAY CPMS SEEING THE BIGGEST SPIKE



Check-point

- ✓ **Advertisers will all be competing for consumers attention.** This drives advertising costs up significantly throughout Q4 each year.
- ✓ **Be prepared** to deploy increased budgets and bid prices to remain competitive and maintain reach against your target audience

Source: Nexxen, 2022- 2023 Proprietary Data



SOCIETY, SHOPPING, ARTS & ENTERTAINMENT CATEGORIES SAW THE HIGHEST INCREASE in Q4 CPMs, INTERNET TECHNOLOGY SAW THE LARGEST DECREASE

In a non-political holiday season, media CPMs increase between 5-20% across most content types, with the most contextually relevant placements seeing the largest increases.

Pockets of inventory across Sports, Food & Drink and Local News actually see decreases in average media costs creating opportunities to find the same users, in more efficient places.

CPMs Changes By Content Category

Content Vertical	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	CHNG
Society													19%
Shopping													16%
Arts & Entertainment													16%
Family & Parenting													9%
Video & Computer Games													9%
Television													9%
Hobbies & Interests													6%
Health & Fitness													2%
Education													2%
Technology & Computing													1%
Real Estate													-3%
News													-3%
Business													-3%
Local News													-11%
Food & Drink													-16%
Sports													-16%
Internet Technology													-43%

Source: Nexxen, 2022- 2023 Proprietary Data



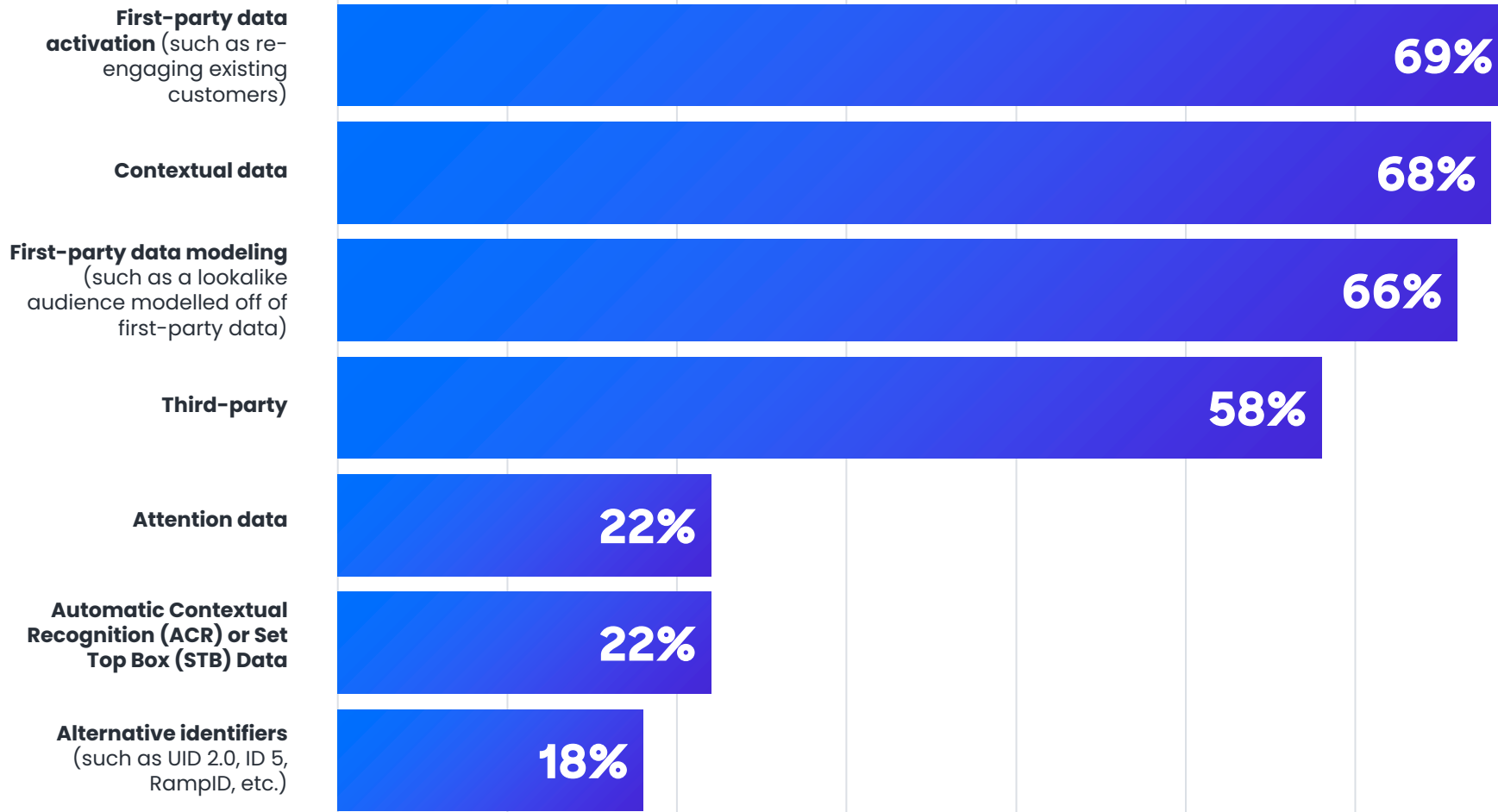
Data and Platform Usage



CONTEXTUAL AND FIRST-PARTY DATA LEAD THE TARGETING PACK

New trends emerge as marketers move to adopt cookie alternatives

WHICH DATA TYPES DO YOU PLAN TO USE FOR YOUR CAMPAIGN TARGETING EFFORTS THIS HOLIDAY SEASON?



FIRST-PARTY DATA IS GOLD

69%

Plan to retarget from first-party data

CONTEXTUAL TARGETING IS HAVING ITS MOMENT

68%

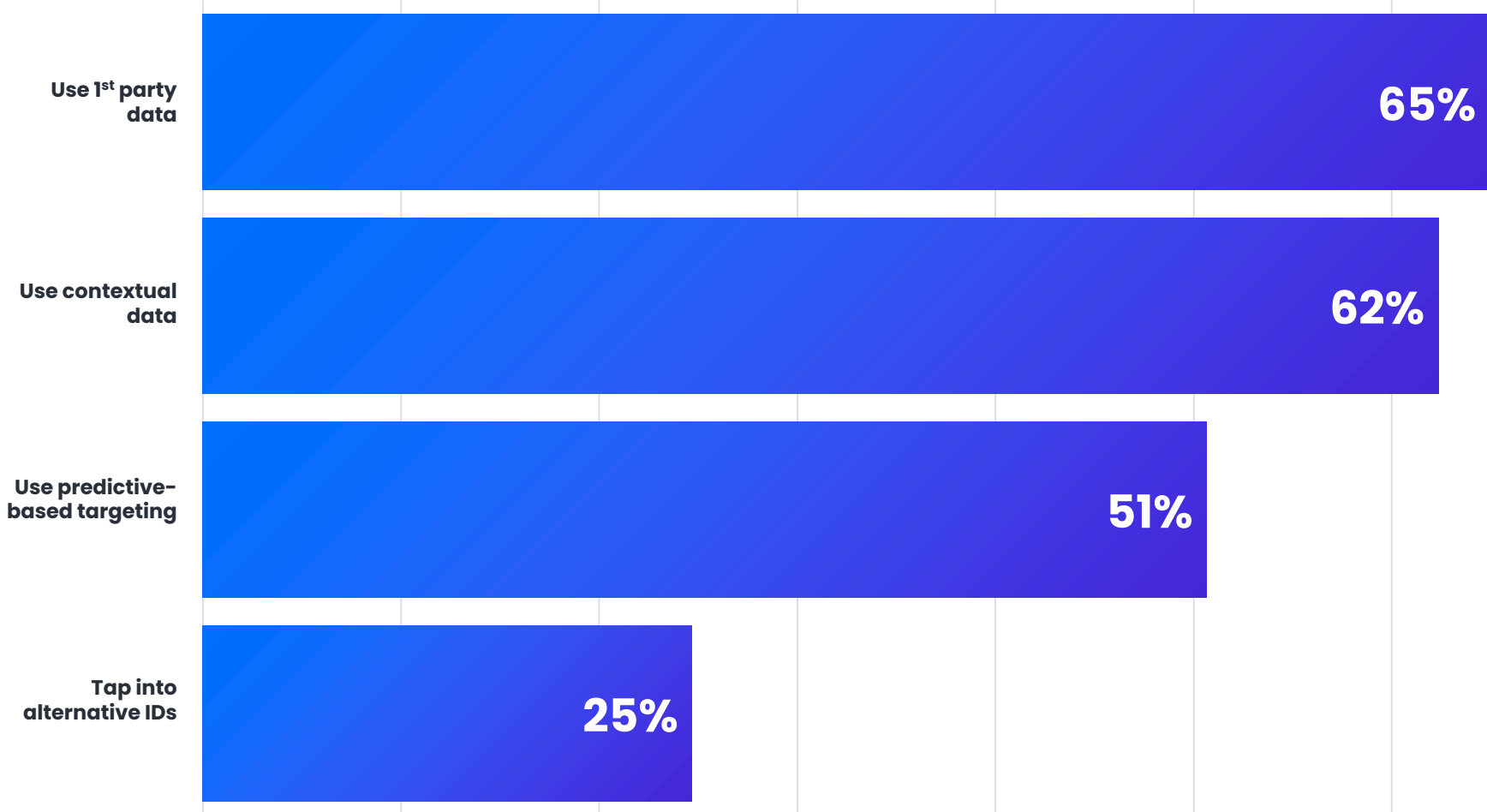
Plan to use contextual targeting

Source: Comscore Custom Survey, "Holiday Checklist", Age 18+, August 2023, U.S.



PREDICTIVE TARGETING TO BE USED BY MORE THAN HALF OF MARKETERS THIS HOLIDAY SEASON TO MITIGATE SIGNAL LOSS CHALLENGES

WHICH TACTICS WILL YOU LEVERAGE AS PART OF YOUR HOLIDAY ADVERTISING STRATEGY THIS YEAR SPECIFICALLY TO MITIGATE CHALLENGES FROM SIGNAL LOSS?



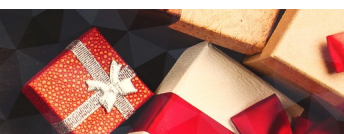
According to the IAB, **50-60%** of signal fidelity has already been lost thanks to browser and regulatory changes



Check-point

- ✓ **Scale with traditional targeting** methods is already half of what it once was and will continue to decline
- ✓ **New approaches to targeting** must be adopted to maintain effective reach

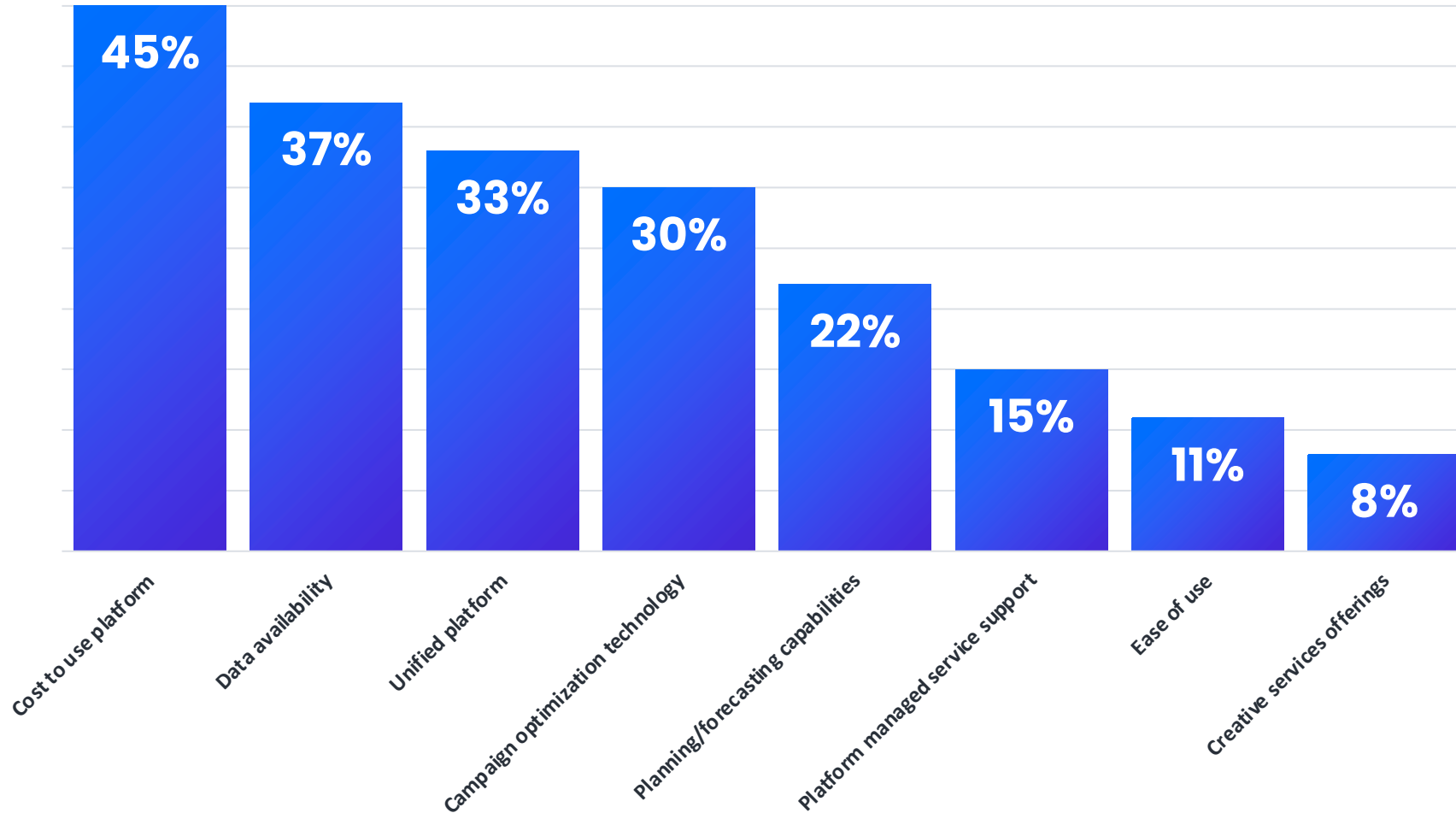
Source: Comscore Custom Survey, "Holiday Checklist", Age 18+, August 2023, U.S. IAB State of Data 2022



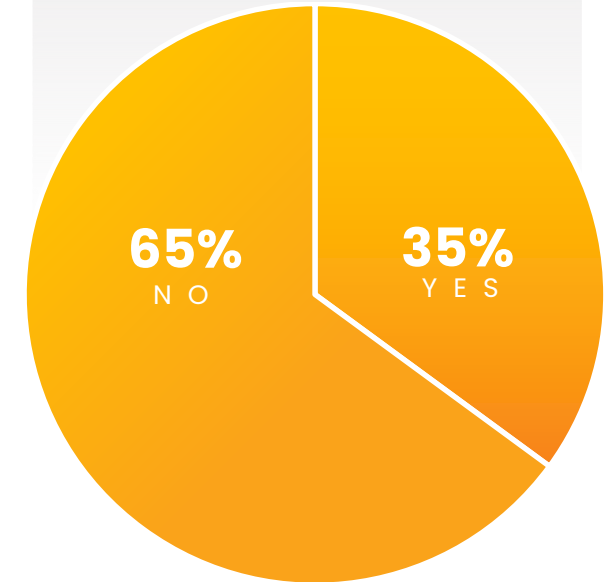
MORE THAN 1/3 OF MARKETERS WILL BE TESTING NEW PLATFORMS THIS HOLIDAY SEASON

Cost and data availability among key factors considered when selecting a new platform

KEY FACTORS THAT GO INTO SELECTING A PLATFORM AHEAD OF THIS HOLIDAY SEASON
% WHO RANKED THE REASON 1ST OR 2ND



DO YOU PLAN TO USE ANY NEW PLATFORMS (DMPS, DSPS, SSPS) TO EXECUTE YOUR ADVERTISING THIS HOLIDAY SEASON COMPARED TO LAST YEAR?



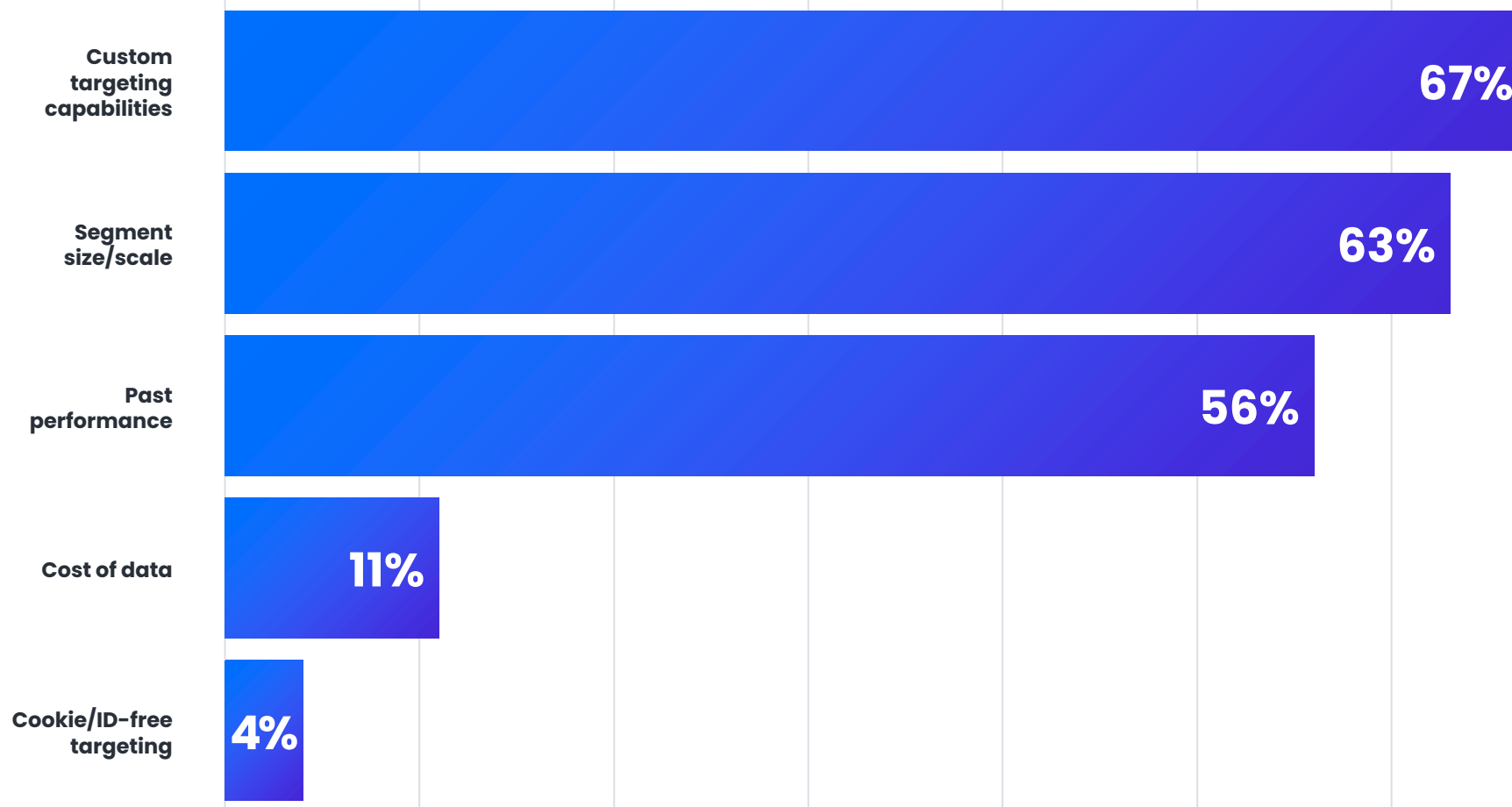
Source: Comscore Custom Survey, "Holiday Checklist", Age 18+, August 2023, U.S.



CUSTOM TARGETING CAPABILITIES RANKED AS TOP FACTOR WHEN SELECTING TARGETING DATA FOR MORE THAN TWO-THIRDS OF MARKETERS

Cost and data availability among key factors considered when selecting a new platform

MOST IMPORTANT FACTORS WHEN SELECTING TARGETING DATA FOR HOLIDAY CAMPAIGNS
% WHO RANKED THE REASON 1ST OR 2ND



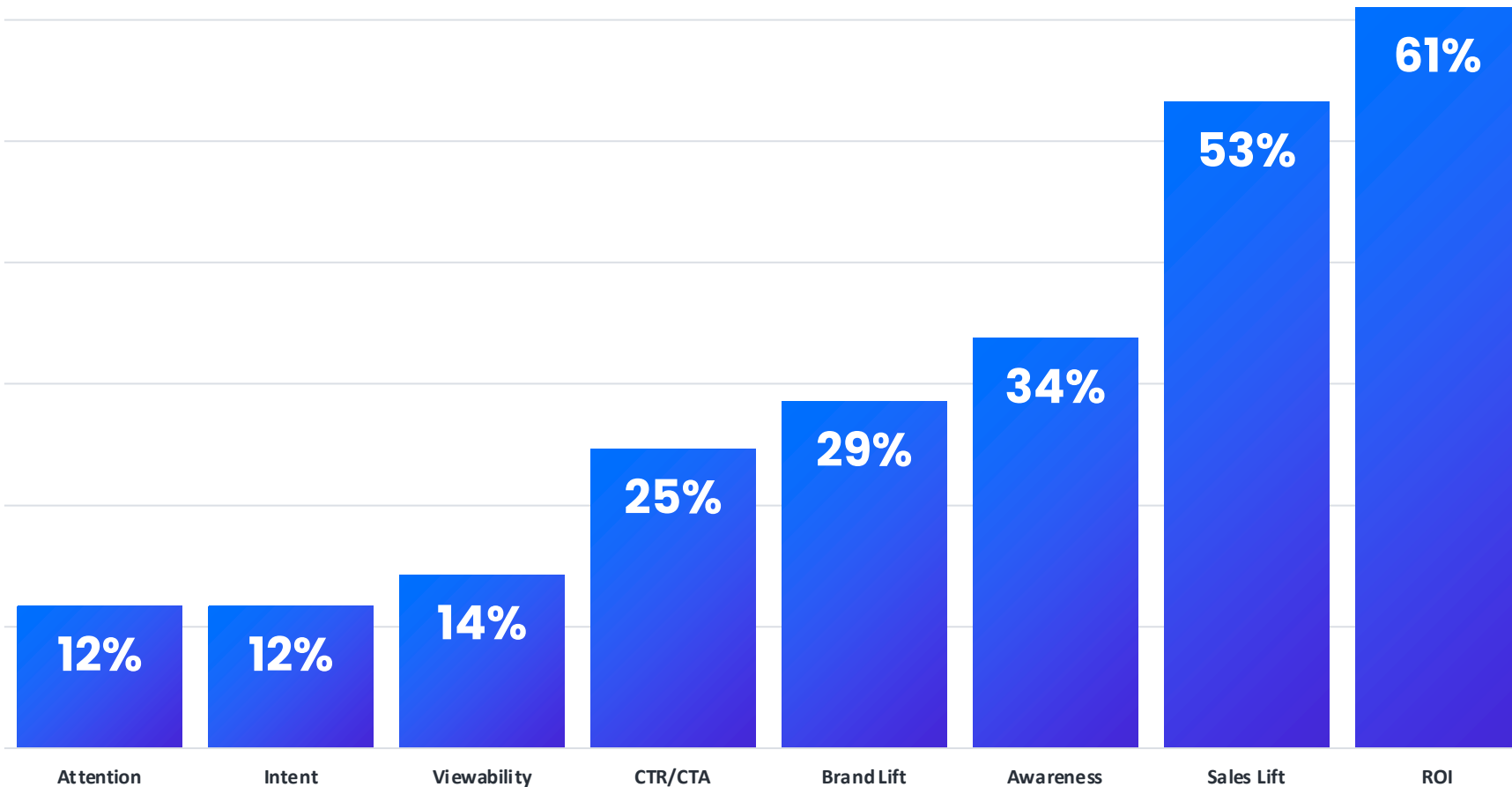
Marketers are willing to pay more for data so long as customization, scale and performance are at play

Source: Comscore Custom Survey, "Holiday Checklist", Age 18+, August 2023, U.S.



ROI AND SALES METRICS EMERGE AS PRIMARY KPIS FOR HOLIDAY CAMPAIGNS

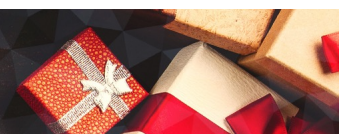
WHEN IT COMES TO MEASURING YOUR UPCOMING HOLIDAY CAMPAIGNS, WHICH METRICS WILL BE MOST IMPORTANT?



Check-point

- ✓ The peak holiday season is for **driving sales and revenue**
- ✓ **Softer KPIs** such as attention, intent and viewability are not as critical
- ✓ Marketers aim to move consumers from awareness and consideration phases into conversion during Q4

Source: Comscore Custom Survey, "Holiday Checklist", Age 18+, August 2023, U.S.



Key Takeaways



1

Mobile
growth



2

Start
early



3

Lean into
cookie
alternatives



✓ The **Holiday** Checklist

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