The Holiday Checklist

An in-depth look at planning and targeting trends to help inform Holiday campaigns
Remington Roberts
INSIGHTS & ANALYTICS MANAGER

Jessica Trainor
HEAD OF PARTNERSHIPS
AGENDA

1. Consumer Holiday Shopping Trends
2. Media Planning Trends
3. Data and Platform Usage
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
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.

METHODODOLOGY

• 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)**

<table>
<thead>
<tr>
<th></th>
<th>December</th>
<th>November</th>
<th>October</th>
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<tbody>
<tr>
<td>2018</td>
<td>28%</td>
<td>34%</td>
<td>28%</td>
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<tr>
<td>2019</td>
<td>38%</td>
<td>34%</td>
<td>38%</td>
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<tr>
<td>2020</td>
<td>29%</td>
<td>33%</td>
<td>37%</td>
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<tr>
<td>2021</td>
<td>28%</td>
<td>34%</td>
<td>38%</td>
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<tr>
<td>2022</td>
<td>28%</td>
<td>28%</td>
<td>44%</td>
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</tbody>
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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**

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

- **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).

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The Holiday Checklist
Tickets & Event now purchased primarily on mobile devices, hitting a peak of 87.6% in Q4 2022.

Share of category spend on mobile devices

Tickets & Events
- Q1'19: 43.6%
- Q2'19: 43.6%
- Q3'19: 55.2%
- Q4'19: 74.7%
- Q1'20: 87.6%
- Q2'20: 77.5%
- Q3'20: 62.1%
- Q4'20: 58.0%
- Q1'21: 44.7%
- Q2'21: 32.4%
- Q3'21: 32.4%
- Q4'21: 32.4%
- Q1'22: 32.4%
- Q2'22: 32.4%
- Q3'22: 32.4%
- Q4'22: 32.4%
- Q1'23: 32.4%
- Q2'23: 32.4%

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

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

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**

<table>
<thead>
<tr>
<th>Gender</th>
<th>Consumption</th>
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<tbody>
<tr>
<td>Female</td>
<td>+12.62%</td>
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<tr>
<td>Male</td>
<td>-10.25%</td>
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</tbody>
</table>

**Holiday Shopper | Gift Recipient**

<table>
<thead>
<tr>
<th>Gift Type</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Gifts for Him</td>
<td>+19.07%</td>
</tr>
<tr>
<td>Gifts for Kids</td>
<td>+7.34%</td>
</tr>
<tr>
<td>Gifts for Friends</td>
<td>+3.75%</td>
</tr>
<tr>
<td>Gifts for Dad</td>
<td>+3.40%</td>
</tr>
<tr>
<td>Gifts for Mom</td>
<td>+2.04%</td>
</tr>
<tr>
<td>Gifts for Her</td>
<td>+1.48%</td>
</tr>
<tr>
<td>Gifts for Office</td>
<td>+1.31%</td>
</tr>
<tr>
<td>Gifts for Techies</td>
<td>-13.69%</td>
</tr>
<tr>
<td>Gifts for Less</td>
<td>-20.97%</td>
</tr>
</tbody>
</table>

Source: Nexxen, 2022, Proprietary Discovery Platform Data

**Check-point**

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

- **Gift Card Purchase of $19-$123**: 20%
- **Gift Card Purchase of $124-$9999**: 18%
- **Mid-Price Gifts Purchase of $21-$95**: 16%
- **Mid-Price Gifts Purchase of $96-$9999**: 12%
- **Seasonal Gifts Purchase of $1-$20**: 10%
- **Seasonal Gifts Purchase of $21-$74**: 10%
- **Seasonal Gifts Purchase of $75-$9999**: 4%
- **Gift Card Purchase of $1-$18**: 4%
- **Seasonal Gifts Purchase of $96-$9999**: 6%

Source: Nexxen, 2022, Proprietary Discovery Platform Data
CONSUMERS LEAN HEAVILY INTO FAVORITE HOLIDAY TRADITIONS

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.

<table>
<thead>
<tr>
<th>Holiday</th>
<th>Thanksgiving</th>
<th>Black Friday</th>
<th>Cyber Monday</th>
<th>Christmas</th>
<th>New Year's</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automotive</td>
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<tr>
<td>Beauty, skin &amp; fashion</td>
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<tr>
<td>Consumer electronics</td>
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<td>Employment</td>
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<td>Family &amp; Lifestyle</td>
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<td>Food &amp; Drink</td>
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<td>Real Estate</td>
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<td>Telecom</td>
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<td>Travel</td>
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</tbody>
</table>

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

SHARE OF VOICE BY HOLIDAY AND VERTICAL

- Technology
- Tech Gift
- Tech Deals
- Savings
- Sales Event
- Home
- Holiday Gift
- Gaming
- Furniture
- Discount
- Best Deal
- Appliance

- Christmas
- Cyber Monday
- Black Friday
- New Year’s
- Thanksgiving

**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 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.

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**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

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Source: Nexxen, 2022, Proprietary Discovery Platform Data
Media Planning Trends
All respondents manage programmatic holiday advertising budgets

- 66% Advertiser
- 16% Agency
- 9% Publisher
- 8% Technology
- 1% Other

**DATA SOURCES: COMSCORE DATA**

**COMSCORE INDUSTRY SURVEY**

Respondents have 19 years of experience on average

**COMPANY NAME**

- 6% Advertiser
- 16% Agency
- 9% Publisher
- 8% Technology
- 1% Other

**TITLE**

- 63% Director-level or above
- 36% SVP and above
- 27% Director
- 23% Manager
- 13% Coordinator, analyst or equivalent

Source: Comscore Custom Survey, "Holiday Checklist", Age 18+, August 2023, U.S.
Most holiday marketing budgets are locked in well before peak shopping begins.

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

During which month do you finalize planning for holiday marketing campaigns?

- 4% Q1 (January-March)
- 6% Q2 (April-June)
- 9% July
- 14% August
- 40% September
- 23% October
- 3% November or later

Nearly 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?

- **12%** Less
- **31%** More
- **55%** About the same

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

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

- 53% in November
- 34% in December
- 4% in August or earlier
- 0% in September
- 8% in October
- 1% in January

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**

<table>
<thead>
<tr>
<th>Media Channel</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop &amp; Mobile</td>
<td>79%</td>
</tr>
<tr>
<td>Social Media</td>
<td>75%</td>
</tr>
<tr>
<td>Connected TV/OTT</td>
<td>74%</td>
</tr>
<tr>
<td>Linear TV</td>
<td>51%</td>
</tr>
<tr>
<td>Audio/ Podcasts</td>
<td>27%</td>
</tr>
</tbody>
</table>

**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

Q2 - Q3 2022
4.7%

Q4 - Q1 2022
12.4%

Q2 - Q3 2023
15.9%

Source: Nexxen, 2022-2023 Proprietary Data

✓ Consider going beyond display as a performance solution and apply elements like QR codes or voice-to-action technology to your CTV buy.
DIRECT BUYING SLIGHTLY ECLIPSES PROGRAMMATIC BUDGETS, WITH BRAND AWARENESS TACTICS COSTING MARKETERS THE MOST

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. 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.

<table>
<thead>
<tr>
<th>Content Vertical</th>
<th>JAN</th>
<th>FEB</th>
<th>MAR</th>
<th>APR</th>
<th>MAY</th>
<th>JUN</th>
<th>JUL</th>
<th>AUG</th>
<th>SEP</th>
<th>OCT</th>
<th>NOV</th>
<th>DEC</th>
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<td>-16%</td>
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<td>Internet Technology</td>
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<td></td>
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<td>-43%</td>
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</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Data Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>First-party data activation (such as re-engaging existing customers)</td>
<td>69%</td>
</tr>
<tr>
<td>Contextual data</td>
<td>68%</td>
</tr>
<tr>
<td>First-party data modeling (such as a lookalike audience modelled off of first-party data)</td>
<td>66%</td>
</tr>
<tr>
<td>Third-party data</td>
<td>58%</td>
</tr>
<tr>
<td>Attention data</td>
<td>22%</td>
</tr>
<tr>
<td>Automatic Contextual Recognition (ACR) or Set Top Box (STB) Data</td>
<td>22%</td>
</tr>
<tr>
<td>Alternative identifiers (such as UID 2.0, ID 5, RampID, etc.)</td>
<td>18%</td>
</tr>
</tbody>
</table>

**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

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

#### Which Tactics Will You Leverage as Part of Your Holiday Advertising Strategy This Year Specifically to Mitigate Challenges From Signal Loss?

<table>
<thead>
<tr>
<th>Technique</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use 1st party data</td>
<td>65%</td>
</tr>
<tr>
<td>Use contextual data</td>
<td>62%</td>
</tr>
<tr>
<td>Use predictive-based targeting</td>
<td>51%</td>
</tr>
<tr>
<td>Tap into alternative IDs</td>
<td>25%</td>
</tr>
</tbody>
</table>

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

- **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.
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):

- Cost to use platform: 45%
- Data availability: 37%
- Unified platform: 33%
- Campaign optimization technology: 30%
- Planning/concierge capabilities: 22%
- Platform managed service support: 15%
- Ease of use: 11%
- Creative services offerings: 8%

Do you plan to use any new platforms (DMPS, DSPS, SSPS) to execute your advertising this holiday season compared to last year?

- Yes: 65%
- No: 35%

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

<table>
<thead>
<tr>
<th>MOST IMPORTANT FACTORS WHEN SELECTING TARGETING DATA FOR HOLIDAY CAMPAIGNS</th>
<th>% WHO RANKED THE REASON 1ST OR 2ND</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom targeting capabilities</td>
<td>67%</td>
</tr>
<tr>
<td>Segment size/scale</td>
<td>63%</td>
</tr>
<tr>
<td>Past performance</td>
<td>56%</td>
</tr>
<tr>
<td>Cost of data</td>
<td>11%</td>
</tr>
<tr>
<td>Cookie/ID-free targeting</td>
<td>4%</td>
</tr>
</tbody>
</table>

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?

<table>
<thead>
<tr>
<th>Metric</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attention</td>
<td>12%</td>
</tr>
<tr>
<td>Intent</td>
<td>12%</td>
</tr>
<tr>
<td>Viewability</td>
<td>14%</td>
</tr>
<tr>
<td>CTR/CTA</td>
<td>25%</td>
</tr>
<tr>
<td>Brand Lift</td>
<td>29%</td>
</tr>
<tr>
<td>Awareness</td>
<td>34%</td>
</tr>
<tr>
<td>Sales Lift</td>
<td>53%</td>
</tr>
<tr>
<td>ROI</td>
<td>61%</td>
</tr>
</tbody>
</table>

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

- 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
Key Takeaways
Mobile growth
Start early
3. Lean into cookie alternatives
WANT TO LEARN MORE? CONTACT US!