Marketer's Guide to Holiday 2022

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Introduction

As people acclimate to a pandemic-recovering world, businesses must also transform to fit the new needs of their consumers. Marketers must be prepared to pivot this Holiday season, as many shifts in economic and consumer trends are imminent. Although the last few years have been unprecedented, one constant theme in the Holiday season remains true: **people are looking to create special moments for their loved ones despite external factors.**

This year, it is important for brands to meet consumers where they are today.

To win this year, brands must show up where consumers are doing their gift research and provide an easy path to purchase. Ovative Group is here as a partner to aid in these efforts. The following report is what we think you can expect from this Holiday season, and how to plan for it. We look forward to building a plan, **together**.

Happy Holidays!

The Ovative Team

Executive Summary

Our experts weighed in on the Holiday landscape, and shared their tips for marketers this season. Read more about each recommendation **here**.

Your Consumers

Value Matters To Consumers.
A bearish market paired with discourse around rising prices and inflation has left consumers wary of the economy.

Flexible Shopping and Payment.
Consumers will continue to desire ease and flexibility from retailers, especially in the face of persistent COVID impacts. From different payment options to seamless experiences online and in-store, consumers will crave options.

Your Business

Supply Chain and Labor Issues.
Lingering effects from last year's supply chain constraints and tight labor market are driving up costs. Combatting this issue by selling off excess inventory with summer sales could lead to promotion fatigue.

Media Cost Dynamics.
Media costs will vary based on multiple market dynamics. For example, mid-term elections will increase ad prices while supply chain concerns could result in advertisers reducing spends. It is difficult to know which dynamics will win but having a plan for every scenario is key.

So, what's a marketer to do?

Shannon Kast
VP Client Services

1 Take a customer-first media approach optimizing to Enterprise Marketing Return (EMR)*.

Your Audience: Establish measurable goals around acquisition, retention, and reactivation audiences

Your Channels: Utilize a full-funnel approach, including a mix of proven and new tactics based on EMR* Predictions.

Your Message: Create audience-aligned messaging around value and convenience.

Your Creative: Use platform best practices and refresh ahead of promotions.

Patrick Johnston
Sr. Director DXO

2 Provide customers with the digital experiences and payment options they want for frictionless shopping.

Listen to your customers to understand where to invest in digital and hybrid experiences ahead of Holiday.

Ensure your site and app experience are prepared for increased traffic, aligning onsite messaging to digital ads.

Test new functionality early for your site and app before key Holiday shopping events.

Steve Baxter
EVP Activate

3 Align marketing with operations and logistics.

Pay close attention to key indicators, both macro and within your business, such as unemployment rate and supply chain issues.

Ensure clear lines of communication between marketing and operations to understand potential risks and incorporate in the digital experience.

Prepare budget and return scenarios for key points during the Holiday season as product availability and pricing will influence marketing performance.

Ensure your product feed is fully optimized to avoid showing ads for low-inventory items

Beth McKigney
SVP Measurement Solution & Capabilities Development

4 Look for opportunities to gain efficiencies by optimizing your media mix to EMR*.

Monitor EMR* performance and Ovative's EMR Power Rankings and have a plan to change course.

Align flighting and forecasts to support an earlier start to the season, give less weight to Cyber 5, and focus on last-minute gift givers.

Apply Store Visit data to maximize enterprise revenue (online and offline) during key periods.

Stay nimble! Outline preapproved spend scenarios to remain flexible when opportunities arise.

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***Enterprise Marketing Return (EMR)** incorporates online and offline revenue, future customer value, incrementality, and profitability into a single metric of success. EMR is not just a return metric but also a mindset that pushes business leaders to transform how they approach marketing.

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Step 1: Take a customer-first media approach optimizing to EMR
Step 2: Provide customers with digital experiences and payment options for frictionless shopping
Step 3: Align marketing with operations and logistics
Step 4: Look for opportunities to gain efficiencies by optimizing your media mix to EMR.

What Happened Last Year?

Trends from the past Holiday seasons can aid in forecasting what to expect this year. Here are four key themes that emerged during the 2021 Holiday season that will continue to take effect in 2022.

1

The Season Was Long and Less Focused on Key Shopping Moments

In 2020, the Holiday season lengthened when Amazon moved Prime Day up to October. This trend continued in 2021 as other retailers like Target and Walmart created early promotion events in October in response.[1] In 2021, customers also shopped early because of concerns about inventory constraints due to supply chain issues. Because of this elongated season, there was less YoY growth for key dates, such as Black Friday and Cyber Monday, even though retail sales for the whole season were up.

2

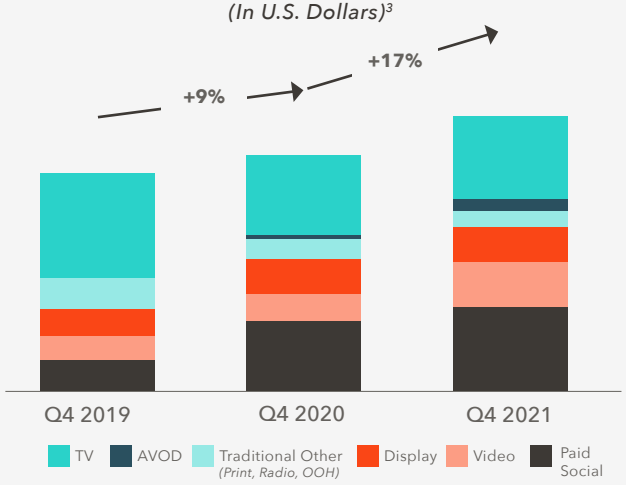
Modest Increase In Media Spending

Since 2020, digital media advertising has represented more than half of retailers marketing spend during the Holiday season. In the past three years, retailers have averaged a 9%-17% increase in media spending overall.

In 2021, advertisers spent more as they anticipated strong growth in consumer demand due to rising wages and government stimulus checks—especially in channels like online video (+76%).[2]

Q4 HOLIDAY MEDIA SPEND 2019 - 2021 BY CHANNELS

(In U.S. Dollars)[3]



3

Supply Chain Delays Created Challenges for Almost Everyone

Supply chain challenges throughout 2021 made it difficult for retailers to avoid running out of inventory. Because consumers were worried about not being able to get what they wanted, there was increased customer demand early in the season.[4] These persisting supply challenges created the conditions for rising inflation and are lowering consumer confidence leading into the 2022 Holiday season.

4

Meeting Consumers Where They Are: The Importance of Omnichannel Strategies and Flexible Shopping

In 2021, news of vaccination and pandemic fatigue drove consumers back to physical stores, and for the first time ever, brick-and-mortar YOY sales growth outpaced e-commerce growth during Holiday.[5]

Despite this brick-and-mortar growth, consumers continued to shop online. A hybrid option that gained popularity last year was Buy Online, Pick Up In-Store (BOPIS) which grew by 15.2% in sales.[6]

Additionally, consumers continued to expect a customized shopping experience, and as a result, services that enabled more flexibility grew in popularity. Total Buy Now, Pay Later Spending in November 2021 was up 422% versus the prior year.[7]

The winners of 2021 Holiday were retailers that developed multichannel, flexible payment strategies to meet consumers wherever they were.

What To Expect This Year

Your Consumers

Value Matters To Consumers

Rising prices, a declining stock market, and lots of discussion about inflation are making people nervous about the economy.

Marketers should start by understanding target consumers needs first and then tailoring messaging to them

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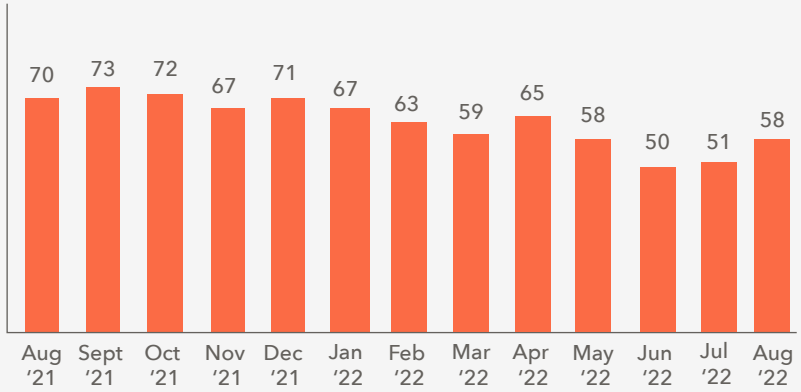
Confidence in the Economy Is Lower Than It Was a Year Ago

A metric to help gauge the current economic climate is the Consumer Sentiment Index. This measures how people feel about the economy, which is likely influenced by factors such as high gas prices and media coverage of inflation.[8] Although the low unemployment rate (3.6%) suggests that people could be spending, their worries about the economy may be holding them back.[9]

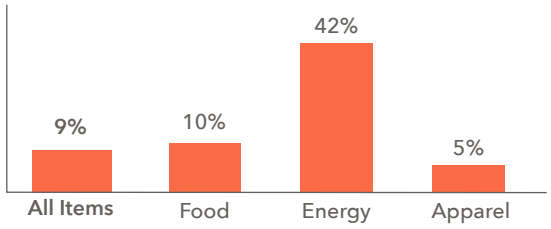
CONSUMER CONFIDENCE INDEX
February 2021-August 2021[10]



Prices, Especially for Necessities, Have Risen Significantly

The Change in Consumer Price Index (CPI) is used to understand the average change over time in the prices paid by consumers for a market basket of goods and services. Looking at data over the last 12 months, CPI has experienced the largest increase since November 1981.[9]

CONSUMER CHANGE IN PRICE (CPI)
Over 12 Months, Ending In July 2022[9]



The Federal Reserve has been raising interest rates to slow demand and lower prices to alleviate this increase. Because of this, it is now more expensive for people to borrow money or carry a credit card balance.[10]

Consumer Sentiment Could Still Shift Before the Holiday Shopping Season

A few state legislatures are working to offer relief payments in a variety of forms, but many are skeptical that these payments would be large enough to have a substantial impact on people's well-being.[11]

Back to School will signal consumers' willingness to spend during the Holidays this year.

Currently, eMarketer predicts only a 0.7% increase in Back to School sales over last year (compared to last year's 14.3% increase over 2020).[12] However, concerns about the economy do not impact all consumers equally. People with higher incomes are not immune, but they may be less motivated to change their behavior.

What should marketers do?

Take a **customer-first media approach** optimizing to Enterprise Marketing Return (EMR).

Your Audience: Establish measurable goals around acquisition, retention, and reactivation audiences

Your Channels: Utilize a full-funnel approach, including a mix of proven and new tactics based on EMR Predictions.

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Your Creative: Use platform best practices and refresh ahead of promotions.

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Flexible Shopping and Payment

Consumers will continue to desire ease and flexibility from retailers, especially in the face of persistent COVID impacts.

Provide customers with the digital experiences and payment options they want for frictionless shopping.

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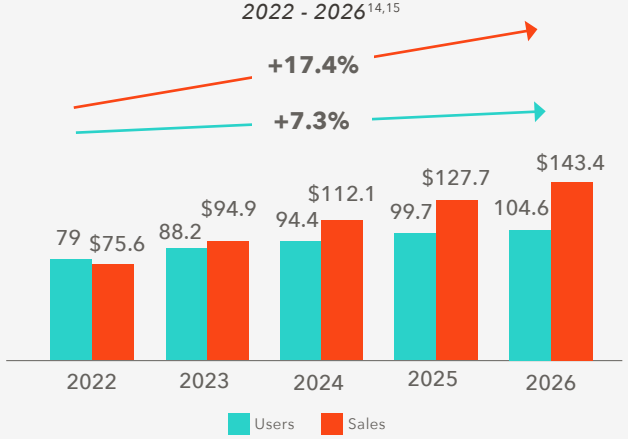
Buy Now, Pay Later (BNPL) Will Continue to Be Big This Holiday Season

Although crypto is a hot topic today, it won't be a primary focus for Holidays (just yet). By 2023, there will be 5.5M crypto users and $16.16B in sales.[13] But BNPL will be a major focus as sales are expected to nearly double by 2026, and there are almost 80M users in 2022. The average BNPL users will finance $957 this year .[14,15]

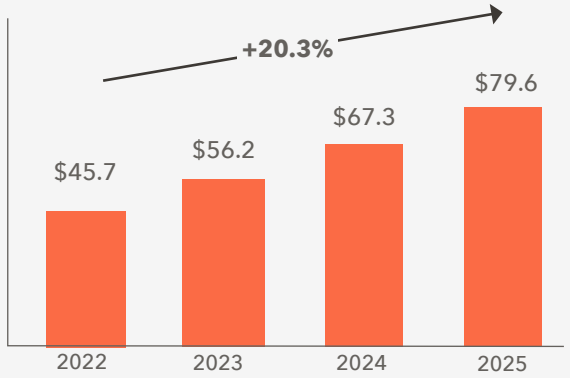
BNPL U.S. USERS (*Millions*) AND SALES (*Billions*)
2022 - 2026[14,15]



Seamless Purchasing via Social Media or Streaming Devices Is Here to Stay

YouTube, TikTok, and Twitter have all launched shoppable features as demand for a seamless shopping experience is rapidly growing.[16] Nearly 61% of shoppers aged 25-34 have purchased on social media before.[16] In addition, Roku and Walmart have teamed up in an exclusive partnership to launch shoppable ads.[17]

RETAIL SOCIAL COMMERCE U.S. SALES
Billions, 2022 - 2025[16]



Other Consumer Considerations

Consider what new moments could be tested this year to ensure demand is captured outside of key Holiday dates. As COVID continues to peak and valley in 2022, consumers may shift their spending accordingly–throughout the summer and into Holiday. We believe that Back to School will be a helpful test for advertisers' digital and hybrid platforms to determine if your strategy is prepared for the current preferences of consumers. Based on results from Back to School, advertisers can adjust accordingly.

What should marketers do?

Provide customers with the digital experiences and payment options they want for frictionless shopping.

Listen to your customers and utilize your data to understand where to invest in digital and hybrid experiences (like BOPIS, BNPL, AR) ahead of Holiday.

Ensure your site and app experience are prepared for increased traffic, aligning onsite messaging to digital ads.

Test new functionality early for your site and app before key Holiday shopping events.

Your Business

Supply Chain and Labor Issues

Lingering effects from last year's delayed supply chain constraints paired with a tight labor market are driving up costs while forcing retailers to close out delayed inventory.

Understand inventory and store operations. Create clear lines of communication between marketing and operations so they can properly advertise what is in stock.

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Many Retailers Have Excess Inventory That They Are Trying to Unload This Summer

In Q1 of 2022, S&P 500 companies had about $1.1 trillion in inventory—16% more than they had the last year.[18] Long-delayed orders of goods that were popular earlier in the pandemic finally arrived. But purchasing dynamics have shifted during these delays: consumers now want to buy more from categories related to experiences and less from the "at-home" categories that were popular earlier in the pandemic.

Many retailers are addressing their excess inventory issues with summer sales, but those sales cause two problems for retailers: [19]

1. Though they need to get rid of the inventory to make room for more, selling these products at a discount will likely hurt their profitability.
2. Big summer sales could impact Holiday demand. Consumers might experience promotion fatigue, or they might be shifting their demand to the summer—and planning to spend less during the Holidays as a result.

In Q1'22 S&P 500 companies had about 16% more inventory than they had the last year.[18]

Rising Fuel Prices, Increased Labor Costs, and More COVID Disruptions Will Continue Through Holiday

Fuel and transportation costs are rising so significantly that both Amazon and Walmart have already implemented policies to reduce the negative impact to profit. In April, Amazon implemented a 5% fuel and inflation surcharge for third-party sellers who use its fulfillment services.[20] Walmart announced that in August it will start charging pickup and fuel fees for suppliers who use its transit services.[21]

As cases of the highly transmissible BA.5 COVID subvariant rise throughout the world, the threat of supply chain slowdowns is also rising. In China, strict testing requirements are slowing truck drivers that carry raw materials to factories.[22]

Unlike other economic markers, the labor market is strong: in May, there were 11.3 million available jobs, nearly two positions for every job seeker.[23] These dynamics mean that workers have more power in the labor market, and companies may have to raise wages or improve benefits to keep stores open and service orders across channels.

What should marketers do?

Align marketing with operations and logistics.

Pay close attention to key indicators that could impact your business:

Macro Trends

- Unemployment rate, stock market, and credit card default rates
- COVID closures, state mandates, and case rates
- Supply chain delays and low inventory across certain categories

Operations

- Product launches
- Inventory levels and shifts (full price, markdown, clearance) and product data feeds
- Shipping cutoff dates
- Fulfillment capabilities

Ensure clear lines of communication between marketing and operations to understand potential risks and incorporate in the digital experience.

Prepare budget and return scenarios for key points during the Holiday season as product availability and pricing will influence marketing performance.

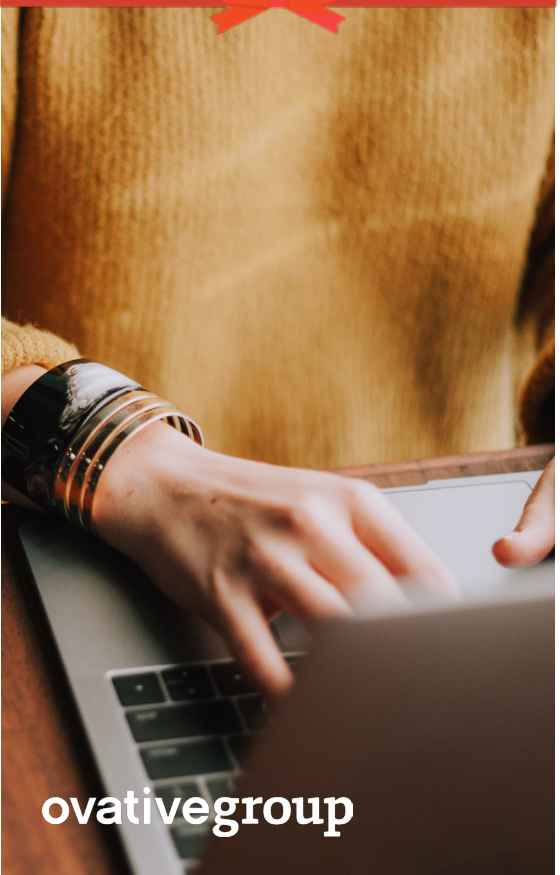
Ensure your product feed is fully optimized to avoid showing ads for low-inventory items.

Your Business

Media Cost Dynamics

Media costs are an outcome of multiple market dynamics, and it's difficult to determine which will win out this season.

Look for opportunities to gain efficiencies in your media mix. Monitor key indicators of performance closely and have a plan for taking action to change course.



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We have outlined the possible scenarios that could happen this season and their effect on ad prices.

Market Dynamic	Impact on Demand or Supply of Ads	Impact on Ad Price
If low consumer confidence reduces Holiday demand, advertisers will likely pull back on spending. Typically, when companies are nervous about revenue, they worry about justifying media spend.	Lower demand for ads	**Lower prices** for ads
Mid-term elections are November 8th and ad spending is expected to reach record levels for a non-Presidential election year.	Higher demand for ads	**Higher prices** for ads
If there are supply chain concerns, advertisers will likely pull back on spending. Limited inventory often makes marketers more cautious about ad spending for fear of generating demand they can't meet.	Lower demand for ads	**Lower prices** for ads
People's time spent with media is projected to remain relatively flat, so there is increased competition for attention.	Higher demand for ads	**Higher prices** for ads
Publishers are opening more ad inventory, including Google and Instagram displaying more ads	Higher supply of ads	**Lower prices** for ads

What should marketers do?

Look for opportunities to gain efficiencies by optimizing your media mix to EMR*.

Monitor performance closely and have a plan to change course:

Media Performance
- EMR*, traffic, and click-thru rate (CTR)

Site Performance
- Site visits, conversion rate (CVR) and cart abandonments

Consumer Trends
- New customer rates, buying behavior (category, device), and consumer sentiment

Promotion Calendars
- Key events and PR

Align flighting and forecasts to support an earlier start to the season, give less weight to Cyber 5, and focus on last-minute gift givers.

Apply Store Visit data to maximize enterprise revenue (online and offline) during key periods.

Stay nimble! Outline preapproved spend scenarios to remain flexible when opportunities arise.

KEY TIMING

November: Focus on early shoppers looking for assortment and in-stock products
- Season of Savings
- Online Only Deals
- Black Friday Deals

December: Lean into gifting post-Black Friday, with a focus on late shoppers looking for value
- Cyber Week
- Christmas Hot Deals
- 4 Day Deals
- Green Monday

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Tactics to Try

EMR Predictions

As dollars are tight this Holiday season, spending on tactics that drive your brand forward will be imperative. Using real Enterprise Marketing Return (EMR) data from our clients, we can assess which channels performed well last season and predict which channels will win this Holiday! We deem this report the EMR Power Rankings. Here are Ovative's Underdogs and Overspender predictions this season.

The Underdogs

Consider investing in these often underutilized, yet high-performing, channels. Because marketers often only use ROAS to gauge performance, they are missing the total value of these channels.

TikTok

TikTok seems to be on every marketer's 2022 agenda. With explosive growth throughout the pandemic, TikTok remains top of the average time spent per day (slightly surpassing YouTube) of 46 minutes.[24] Though user adoption is booming, the sophistication of ad serving is still within its infancy stage to drive immediate realized return. We anticipate TikTok to move up in EMR Power Rankings due to its strong FCR but this channel remains below the top 10-fold.

CTV: Connected TV (OTT)

CTV has proven to be a great way to reach consumers who are cutting cords and moving into a digital space. 109 million US households will use a connected TV (CTV) this year, accounting for 83% of total households.[25] Publishers like Netflix and Disney are opening their ad-supported options in Q4 2022 or Q1 2023. Time spent with devices has returned to the same steady growth as before the pandemic, cementing consumer behavior of spending time with CTV. With more publishers offering ad-supported options, it's more possible than ever to scale campaigns to large audiences due to the proliferation of content.

Streaming Audio

Streaming Audio continues to make gains against terrestrial radio in terms of time spent listening. Digital audio will account for over 12% of overall media time with US adults, with steady growth expected.[26] This is driven largely by the subcategory of podcasts. US adult time spent with podcasts is expected to grow 15% this year. [26] Podcasts will account for more than 25% of all digital audio revenues this year, with several major companies building out huge podcast ad businesses (iHeartMedia, Spotify, Audacy, etc).[27]

The Overspenders

Be aware of these channels commonly overspent on by marketers because they rely on ROAS. Using EMR, we can understand the true value of these channels.

OOH

While the world has opened back up and OOH is more prevalent now than two years ago, consumers are continuing the move to digital. Particularly for retail brands, consumers want to be able to click on a link and purchase. While it is still beneficial to diversify your mix, there is an opportunity to pull back investment in OOH as the channel catches up to digital maturity.

Keep An Eye On

Be aware of key trends on Meta impacting audience size and efficiency;

- Facebook is seeing usage plateau but will observe declines as older generations are losing interest and younger generations will not adopt as fast as users exit
- Instagram will remain competitive in the marketplace to generate new users and therefore increase EMR performance for two reasons. The platform capitalizes on the sophistication of its algorithm and it is highlighting short form user-generated video content more effectively than Facebook (competing with disrupter TikTok).

The result: break-even. Facebook's usage decline and Instagram's increase will cause an even loss/gain and keep Meta at the forefront.

Meta Upper Funnel

We foresee Meta Upper Funnel continuing to move down slightly in EMR Power Rankings as its algorithm is inherently designed to reach the most users at the most efficient rate. As discussed, Facebook's decline in users and Instagram's slight increase will keep efficiencies steady. However, as advertisers diversify spend, it will become more expensive and decrease profitability.

Meta Lower Funnel

Meta will remain at the top of the EMR Power Rankings Chart due to its sophisticated algorithm and targeting, which enables it to drive realized returns.

So, What's A Marketer To Do?

While many scenarios could take place this Holiday season, we hope this guide helps enlighten your Holiday planning and get prepared for multiple scenarios. Check out our key recommendations to help prepare your brand to best serve customers and business needs at large.

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1

Take a customer-first media approach optimizing to Enterprise Marketing Return (EMR)*.

Your Audience

Establish measurable goals around acquisition, retention, and reactivation audiences.

Explore audience opportunities by leveraging first party data as we enter a cookie-less world.

Your Message

Create audience-aligned messaging around value and convenience.

Understand your competitors' positioning as customers will be researching the most valuable option to purchase.

Your Creative

Build creative using platform best practices and refresh frequently ahead of key promos.

For social creative, take advantage of these successful trends:

- Native and Authentic: Storytelling that meets the viewer where they are and feels as if it's coming from a friend.
- Clean and Bright: Content that draws the viewer in with humor and vibrancy that makes a quick and lasting impression.
- Informative and Sleek: Inform customers about the larger impact your products or brand has on them and their loved ones.

Your Channels

Utilize a full-funnel approach, including a mix of proven and new tactics based on EMR Predictions.

Awareness

Leverage Google's Performance Max upper funnel placements in Discovery Ads and YouTube to drive pre-Holiday awareness.

Test and learn with a **CTV Partner Mix** to identify opportunities for direct partnerships with ad-supported streaming.

Leverage underdog tactics, such as **Streaming Audio**. Focus on podcasts & Holiday-themed playlists.

Tailor traditional media messaging towards in-store and omnichannel to eCommerce shopping.

Consideration

Try Google's Response Search Ad Customers/Extensions or the Google Merchant Center if you're advertising promotions. Utilize these tactics to highlight your deals and keep them relevant in searches.

Test **TikTok** by leaning into an influencer strategy. Make sure to use interest targeting to attract relevant users.

Conversion

Test Google's Automated Discounts pilot to drive increased Shopping performance for eComm.

Leverage Display retargeting to address site and store visitors who didn't make a purchase.

Overlay tech payment partnerships such as Stitcher or Klarna on **Instagram Ads** for key promos.

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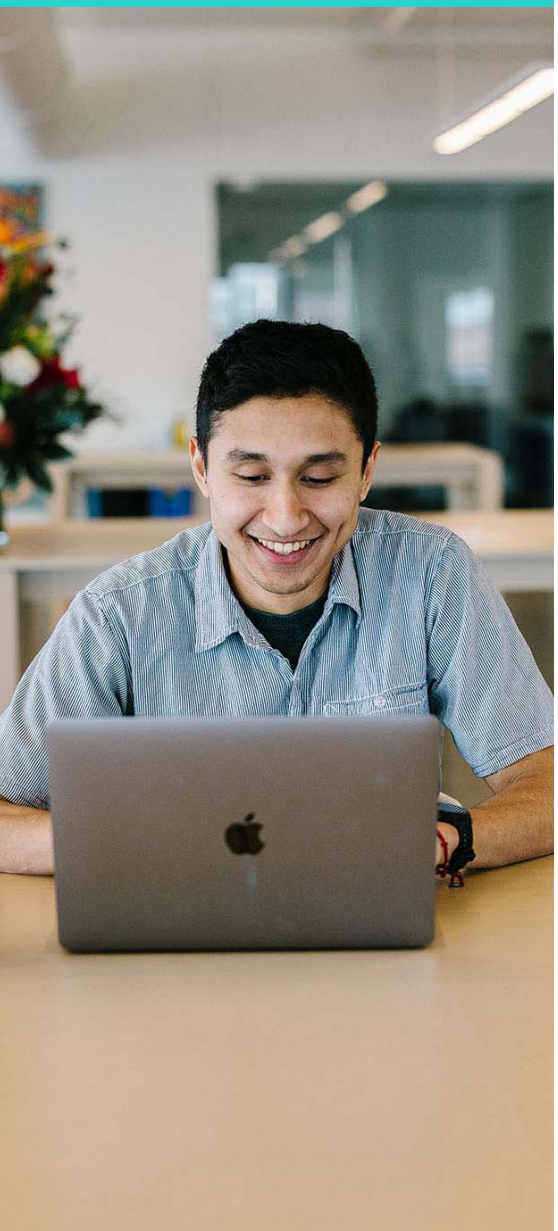

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Ensure clear lines of communication between marketing and operations to understand potential risks and incorporate in the digital experience.

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Ensure your product feed is fully optimized to avoid showing ads for low-inventory items.

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Monitor performance and Ovative's EMR Power Rankings and have a plan to change course.

Media Performance

- EMR, traffic, and click-thru rate (CTR)

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Consumer Trends

- New customer rates, buying behavior (category, device), and consumer sentiment

Promotion Calendars

- Key events and PR

Align flighting and forecasts to support an earlier start to the season, give less weight to Cyber 5, and focus on last-minute gift givers.

Apply Store Visit data to maximize enterprise revenue (online and offline) during key periods, such as post-shipping cutoff.

Stay nimble! Outline preapproved spend scenarios to remain flexible when opportunities arise.

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Lastly, we have outlined three potential situations that could play out during the 2022 Holiday season.

Situation	Leading Indicators	How to Prepare	Actions to Take in the Moment
Economy Declines Quickly	• National unemployment rates • Credit card default rates • Stock market	If marketers see these indicators, the best way to prepare is to spend as much as possible now above return and variable contribution goals to get out ahead of a potential depression.	• Align on adjusted spend and performance thresholds to know when to pull back on spend. • Revise annual goals for your brand based on the new state of the economy • Identify who is still buying and cater the program to them
Inventory Breaks	• Inventory levels versus remaining revenue potential	If marketers see unsold inventory stack up, they should know which products to lean on and test what audiences and creative treatments will most effectively sell that product.	• Teams should shift spend to products and creative identified in the above analysis/tests
Ineffective Promotions	• Low click through rates (CTR) • Low conversion rates (CVR)	To prepare for the potential of low CTR and CVR compared with previous promotions, teams should continue to maintain alignment on variable contribution margins to drive as much volume as possible at full price. This way, marketers will create flexibility for moments of low CTR and CVR.	• Shift spend to time periods outside of the promotion to elevate variable contribution of promotion dollars • Based on this action, marketers should be comfortable with not hitting volume goals for the given timeframe while seeking to increase spend and maximize when margin is high

The Holiday season represents a significant opportunity for marketers. To win, marketers must maximize enterprise return through a fluid investment strategy, align operations and logistics with marketing, and expect the unexpected.

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27 | *Podcasts will account for more than one-fourth of digital audio ad spending*, eMarketer

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We have given you a lot to consider, but you are not alone. We are here as partners to help you implement impactful marketing solutions and prepare early for the industry changes that lie ahead.

Contact us to prepare your Holiday strategy!

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Ovative Group is a digital-first media and measurement firm. We bring together the best of media, measurement, and consulting to enable an enterprise approach to marketing that increases our clients' profitable revenue, strengthens their customer base, and creates sustainable competitive advantage.

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