



“What We're Seeing”

Planning for the Holidays

Session Agenda



01

02

03

04

Introductions

Good day & Welcome
from CivicScience

What we're seeing

CivicScience
InsightStore – How we
uncover the unknown

The Holiday Forecast

What's going down
this fall and winter?

Wrap it up

Closing and
How to Reach us



Introduction to CivicScience

How we continue to identify changes as they occur in real time.





**In the time it takes to
read this, the world
around your consumer
will change.**



Only CivicScience can give you
access to a living, breathing,
and ever-evolving picture of the
modern consumer.

We help you to anticipate the
commercial impact of cultural
events in real-time.

**CivicScience is here
to help you grow.**

Macro Trends Impacting the Marketing Landscape



Inflation

01

02



Supply
Chain



Covid

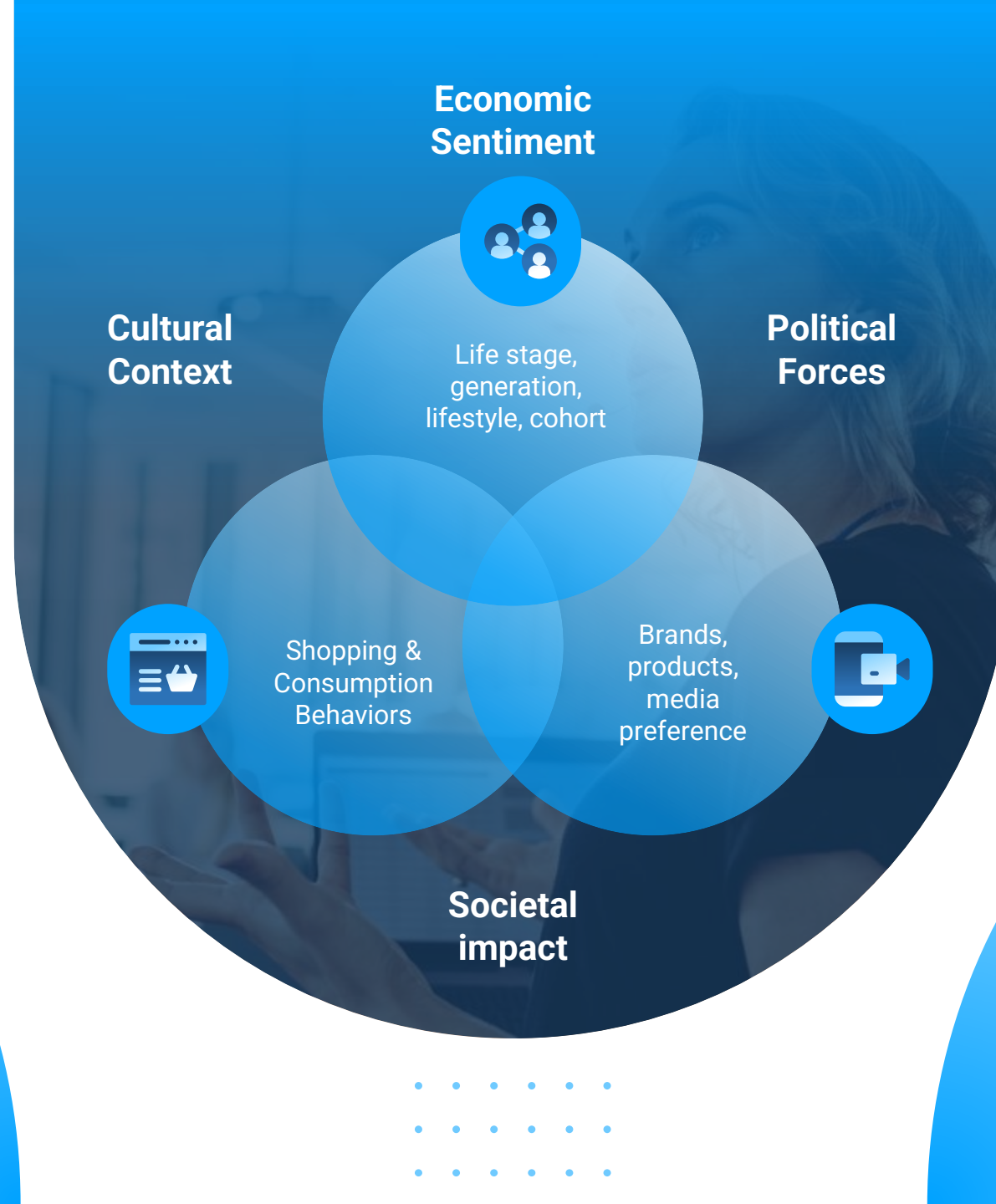
03

04



Gas
Prices

Our Two Principles



Everything affects
everything...

Everything is
Constantly changing



Civicscience is the source of truth data that quantifies the chaos.

If you could know when market conditions are favorable, **would that impact your marketing and media spend?**

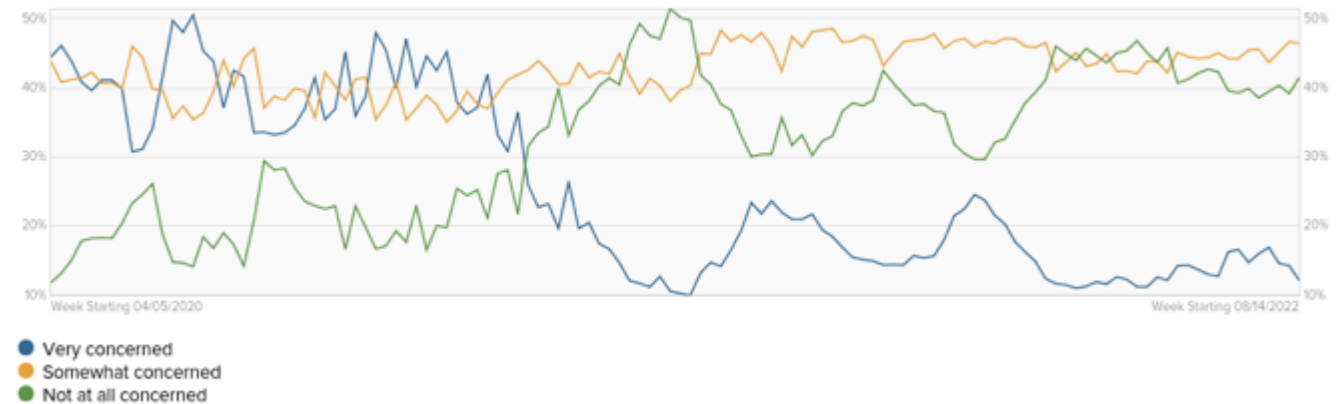
If you could know what uncontrollable factors are interfering with behavioral or product adoption, **would that impact your earnings strategy?**

Find the adopters **AND** know when the lane for adoption opens with one tool:
CivicScience.



How concerned are you about being in public spaces right now? - Weekly Percentage

> All respondents in segment Canonical - United States (includes PR) in network CivicScience Network
> Weighted according to U.S. Census figures for gender and age, 18 and older



Generated by CivicScience® on Aug 18, 2022 at 22:31:20 EDT

Are you eating at home (including takeout and delivery) or eating out more than you usually do for this time of year? - Weekly Percentage

> All respondents in segment Canonical - United States (includes PR) responding in the last 3 months in network CivicScience Network
> Weighted according to U.S. Census figures for gender and age, 18 and older

How do you feel about your household income today? - Monthly Percentage

> All respondents in segment Canonical - United States (includes PR) in network CivicScience Network
> Weighted according to U.S. Census figures for gender and age, 18 and older

Over the past 12 months, have you become more or less price sensitive? - Monthly Percentage

> All respondents in segment Canonical - United States (includes PR) responding on or after 12/01/2020 in network CivicScience Network
> Weighted according to U.S. Census figures for gender and age, 18 and older



What we've seen and expect to see

The Holiday Season in brief.

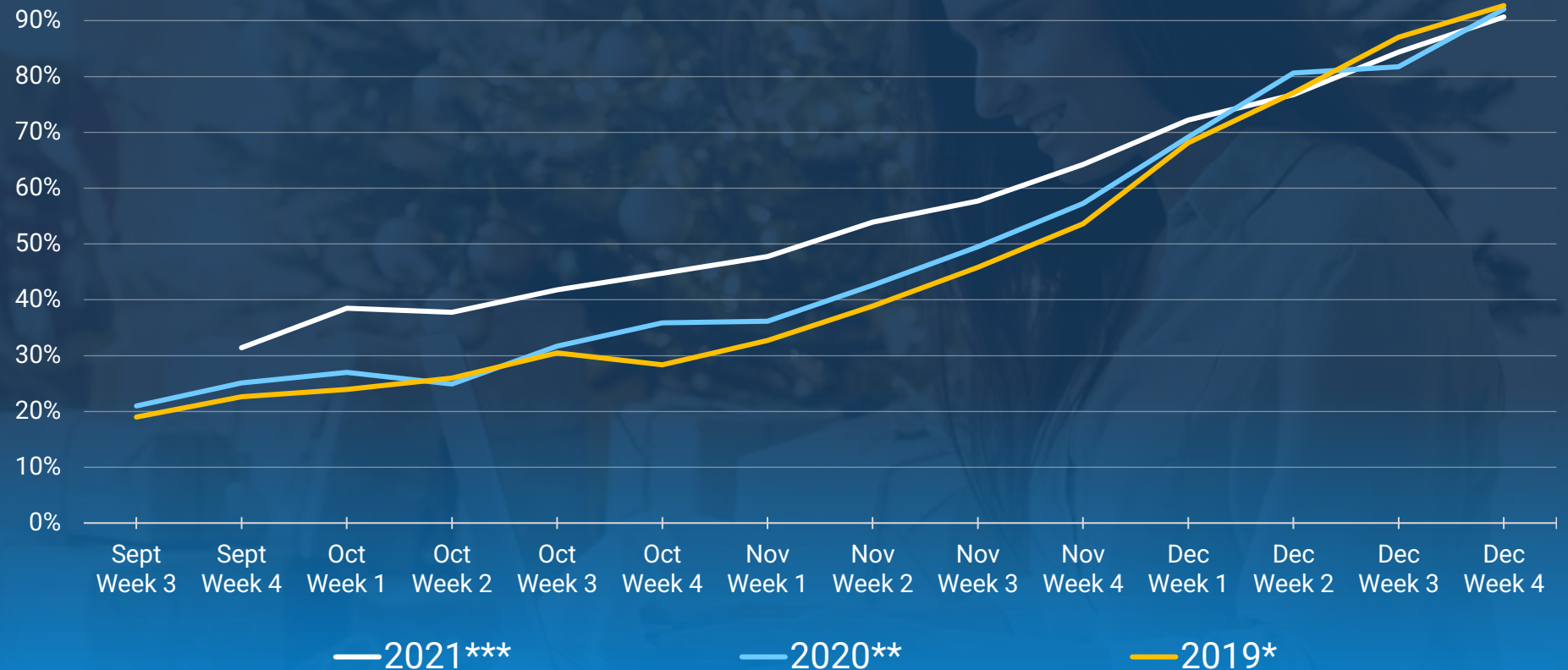


Last year, consumers began their holiday shopping earlier than usual, presumably to get ahead of supply chain issues.



How far along are
you in your holiday
shopping?

(% I have started)



* 21,658 responses (Rebased among holiday shoppers) weighted by US Adults from 09/26/2019 to 12/25/2019 | $\pm 1\%$

** 29,632 responses (Rebased among holiday shoppers) weighted by US Adults from 09/23/2020 to 12/31/2020 | $\pm 2\%$

*** 25,505 responses (Rebased among holiday shoppers) weighted by US Adults from 09/29/2021 to 12/31/2021 | $\pm 1\%$



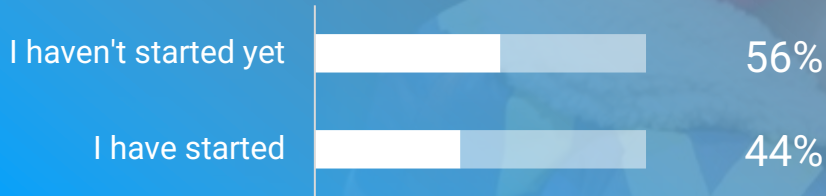
Radio is a way to reach those that are still waiting to get started, particularly during the commute.

How far along are you in your holiday shopping? (% I have started)

US Adults

All respondents in segment Canonical – United States (includes PR) weighted by U.S Adults. Answers grouped by Rebased (among holiday shoppers) and simplified.

How far along are you in your holiday shopping?



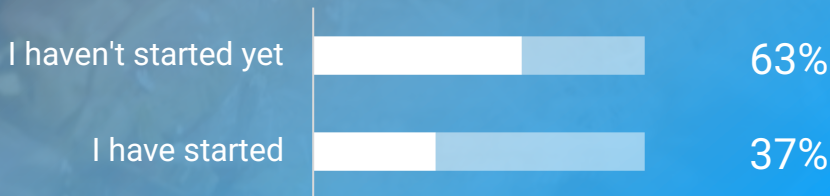
Margin +/- 3%

1,893 responses from 08/22/2022 to 08/29/2022

Listens to Radio While Commuting

All respondents in segment Parents with children 0-11 weighted by Autoweight - U.S Adults. Answers grouped by Rebased (among holiday shoppers) and simplified.

How far along are you in your holiday shopping?



Margin +/- 8%

308 responses from 08/22/2022 to 08/29/2022

Why You Care:

If shopping starts earlier, your consideration window is smaller, or you risk only reaching customers once they're already wrapping up for the season.



Nearly a third of holiday shoppers (31%) have already begun their shopping for this year, which according to the slide earlier, already puts them ahead of where holiday shoppers were in early October of 2019 and 2020 and has already reached the point holiday shoppers were at the end of September last year (in 2021).



Our clients are already in market measuring this and adjusting their strategies to accommodate the market conditions.

How far along are you in your holiday shopping?*(Aug 22-29, 2022)

%

I haven't started yet

69%

I have started

31%

*1,893 responses (Rebased among holiday shoppers) weighted by US Adults from 08/22/2022 to 08/29/2022 | ± 2%

After record breaking holiday spend seen in 2021, 24% of holiday shoppers anticipate spending *more* this year, but that's compared to 26% who say they anticipate spending *less*.



How much do you expect to spend this holiday season as compared to last holiday season?*

%

Will spend more

24%

Will spend about the same

50%

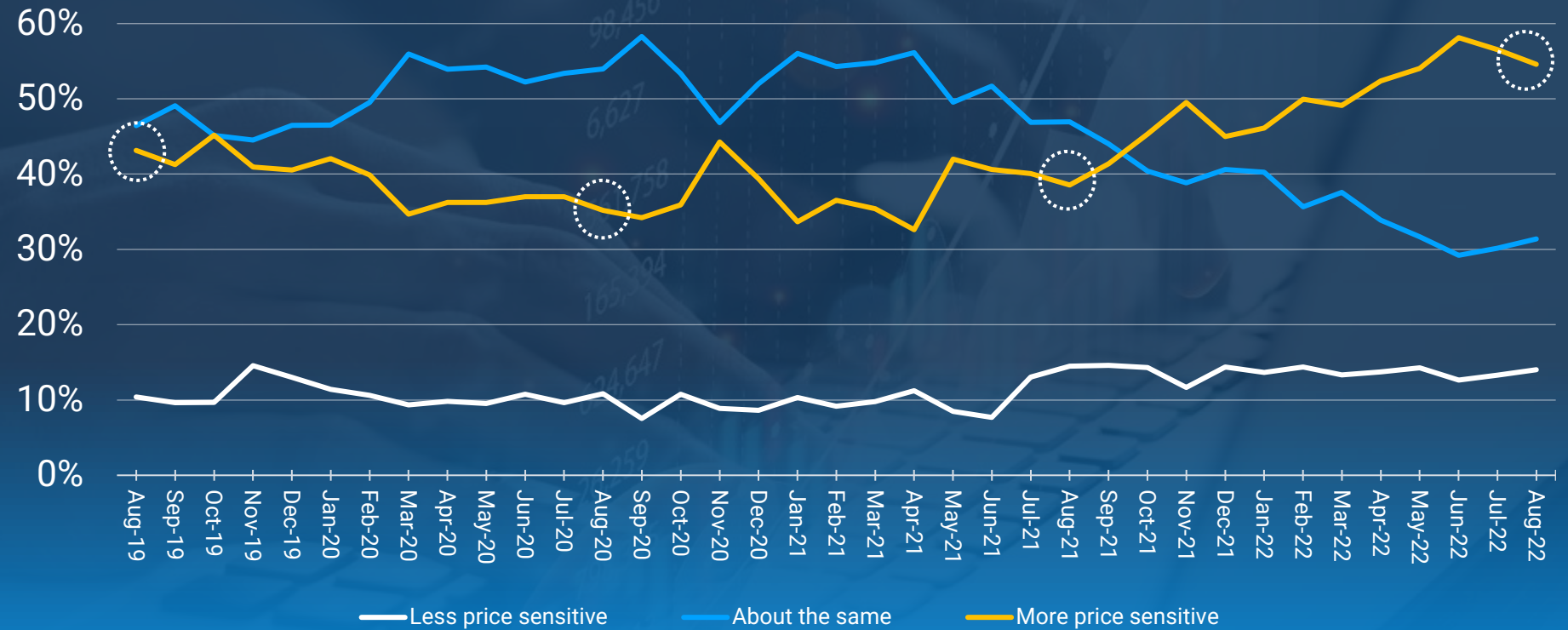
Will spend less

26%

In fact, consumers are feeling significantly more price sensitive now than compared to the same time over the last three years.



Over the past 12 months, have you become more or less price sensitive?*



*220,465 responses weighted by US Adults from 08/01/2019 to 08/24/2022 | $\pm 1\%$



Those who are less price sensitive are more likely to be radio listeners. Marketing higher priced items may find traction over airwaves.

Over the past 12 months, have you become more or less price sensitive? compared with *On an average weekday, during which of the following times do you listen to the radio most often?*

> All respondents responding in the last 3 months

> Weighted according to U.S. Census figures for gender and age, 18 and older

Over the past 12 months, have you become more or less price sensitive?

Less price sensitive (15%)



About the same (34%)



More price sensitive (51%)



On an average weekday, during which of the following times do you listen to the radio most often?



9,918 responses. Significance: $\chi^2_{(df=8)}=247.321, p<0.001$, Medium Strength of Association ($T=0.094$)

Generated by CivicScience® on Oct 17, 2022 at 10:25:30 EDT

Why You Care:

You don't get to choose what your consumers want, you can only choose how you meet their needs. Swim upstream if you want, but here's the path of least resistance and highest efficiency.

Oh, and these numbers won't be the same in one month, meaning your messaging needs to update alongside consumer expectations.

Which of the following will be most important to you when deciding where to shop for the holidays this year?*

	%
Deals / promotions	32%
Free shipping	21%
Product availability	20%
Expedited shipping	5%
Buy now, pay later options	4%
Curbside pickup option	3%
Other	15%



Compared to this time last year, slightly more (58%) holiday travelers anticipate traveling during this holiday season.

Do you typically travel for the holidays, and if so, do you still plan to do so this year?*

%

I usually travel, and I still plan to do so this year

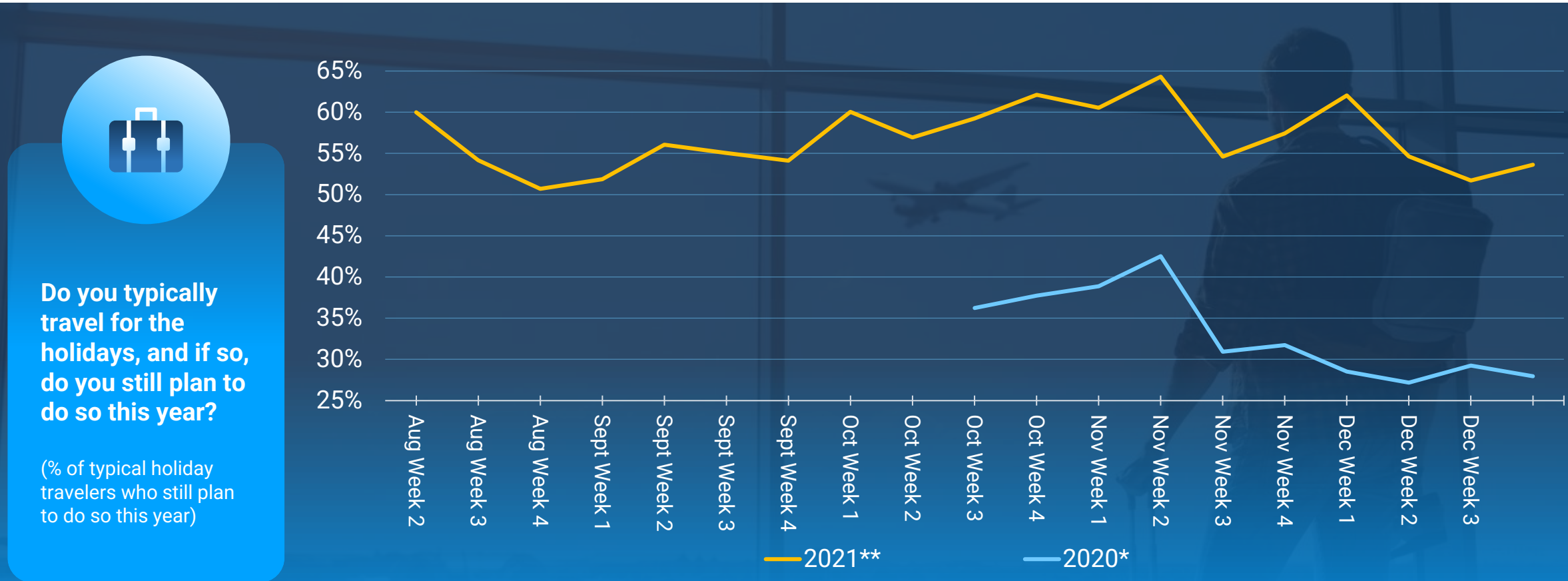
58%

I usually travel, but it's unlikely that I'll do so this year

42%

*829 responses (Rebased among typical holiday travelers) weighted by US Adults from 08/19/2022 to 08/24/2022 | ± 6%

As we've seen the past two years, holiday travelers have regularly had their travel plans interrupted throughout the holiday season (mainly because of COVID), so it's very possible we could see some of that happen again this year.



*4,199 responses (Rebased among typical holiday travelers) weighted by US Adults from 10/20/2020 to 12/24/2020 | $\pm 3\%$

**11,201 responses (Rebased among typical holiday travelers) weighted by US Adults from 08/16/2021 to 12/24/2021 | $\pm 2\%$



Compared to this time last year, slightly more (58%) holiday travelers anticipate traveling during this holiday season.

Do you typically travel for the holidays, and if so, do you still plan to do so this year?*

%

I usually travel, and I still plan to do so this year

58%

I usually travel, but it's unlikely that I'll do so this year

42%

*829 responses (Rebased among typical holiday travelers) weighted by US Adults from 08/19/2022 to 08/24/2022 | ± 6%



For those that are planning to travel, the car is still the preferred method, meaning lots of potential for radio time.

Do you typically travel for the holidays, and if so, do you still plan to do so this year? compared with *Do you plan to travel in the next month?*

> All respondents responding in the last 3 months
> Unweighted

Do you typically travel for the holidays, and if so, do you still plan to do so this year?

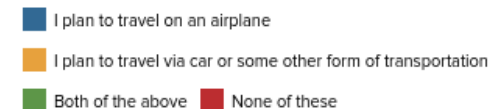
I plan to travel this year (23%)



I don't plan to travel this year (77%)



Do you plan to travel in the next month?



8,447 responses. Significance: $X^2_{(df=3)}=752.067, p<0.001$, Very High Strength of Association ($T=0.227$)

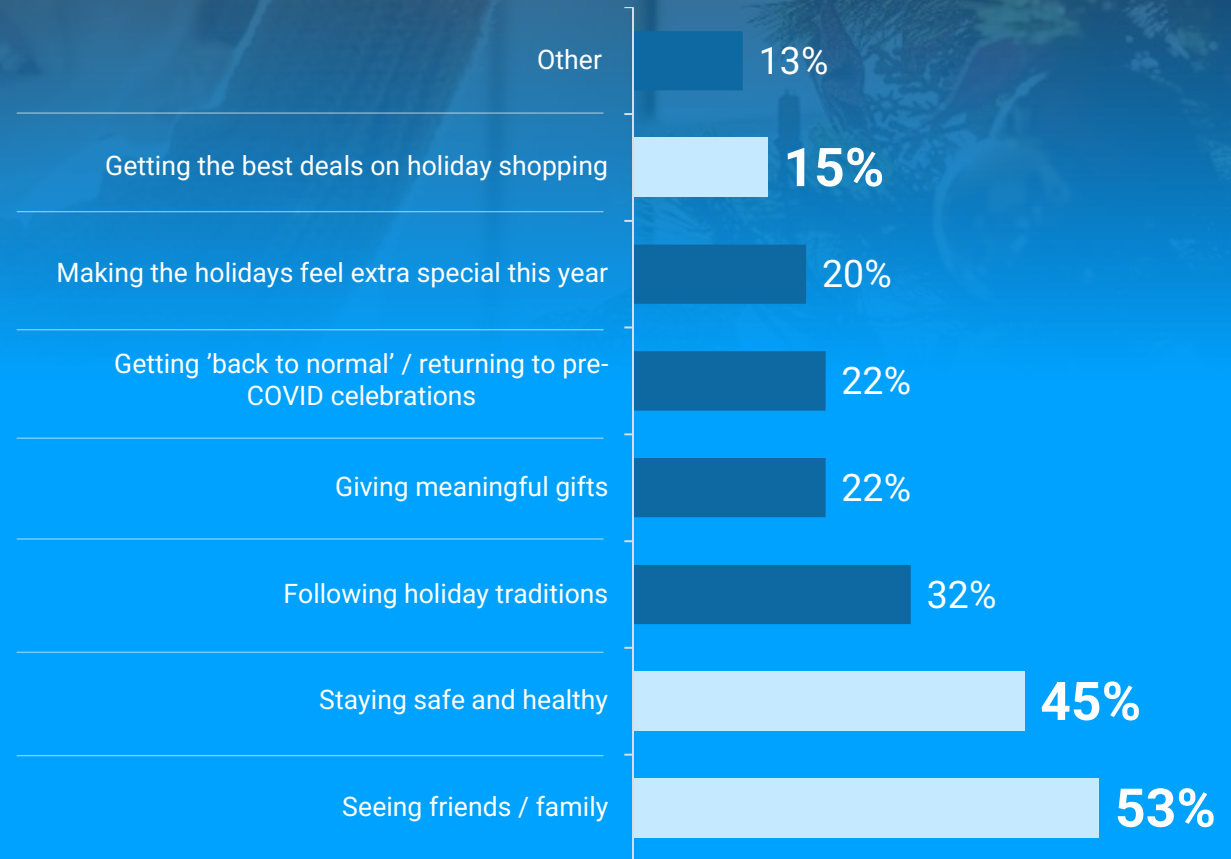
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Why you care:

It's still the holidays. People will figure out nostalgic traditions they refuse to let go of. They will see their family, whether it's digitally or in person. That has a trickle down impact on everything. Every category starts at the top, and the top of the food chain is the customer, and the customer makes decisions based on how they feel, now how you want them to feel.

What are your main priorities this holiday season?

*(Please select up to 3 answers.)**



Key Findings Review

Holiday shopping seems to be starting earlier and earlier.



1. We saw consumers shopping earlier than ever for the holidays last year because of supply chain issues, and we see leading indicators that would suggest the same this year (slides 4+5 in attached deck).
2. This is even more so the case for parents with younger children, who are 1.5x as likely as the average adult to have started their holiday shopping already (incorporate data below).

For parents of young children, in particular, they're expecting to spend more this holiday season amid rising toy prices, which means making compromises elsewhere.



1. Unlike for most Americans, Parents with young children expect to spend *more* on the holidays this year, as many **major toy brands have hiked their prices.**
2. Increased spending on gifts, however, may mean some parents having to make some financial compromises elsewhere. In fact, parents with younger children who typically travel for the holidays say they're less likely to do so this year, setting them apart from other adults (incorporate data below).

→ **As we've seen with things like in-person gatherings, travel and online shopping, the past two holiday seasons have been extremely unpredictable.**



Q&A

Didn't get your question in?

Contact Casey directly at **casey@civicscience.com**





How to Win the Holiday Season with CivicScience



The Holiday Tracker will be produced and delivered to our partners on a monthly basis from now to January.



Our intent of the Holiday Tracker is to serve as a monthly, directional forward-looking source of data for you and your team to keep ahead of the customer before, during, and post the holiday season.



We do this by tying your segments and category to our always-on syndicated data to provide a real time anticipatory view of holiday trends.



If you'd to learn more, please reach out directly or book some time.



Looking forward to connecting and winning the holiday season, Together!