Research Methodology

RadiumOne and MindMover conducted a 10 minute online survey with more than 40 questions among 1,000 respondents who celebrate the Holidays. Recruited from the MindMover Connect panel.

Sharing data is derived from in-app, mobile web and desktop web sharing activity from October – December, 2015.

*Data is significance tested at 95% confidence level indicates the figure is significantly higher.
Executive Summary

Marketers have a huge opportunity to engage with online consumers during the holiday season:

The holiday season is the busiest time of year for retailers and shoppers
Connected devices play an important role in holiday research and shopping

Media consumption goes up during the holidays
Most consumers will spend more time online, watch more TV, and go to the movies more often this holiday season

Social Sharing increases during the holidays
Festive Pictures, Videos and Gift Ideas will be the most commonly shared content
Shopping Habits During the Holiday Season
Most consumers give 10+ presents, to an average of 7 recipients

Number of presents
The majority of consumers are likely to buy 10 or more presents this Holiday season, with women much more likely to do so.

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Number of Presents</th>
</tr>
</thead>
<tbody>
<tr>
<td>64%</td>
<td>buy 10+</td>
</tr>
<tr>
<td>25%</td>
<td>Buy 5-7</td>
</tr>
<tr>
<td>11%</td>
<td>Buy 1-4</td>
</tr>
</tbody>
</table>

Number of recipients
On average, people will buy presents for 7 recipients, with women nearly twice as likely to exceed this number and purchase gifts for more than 10 people.

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Number of Recipients</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>recipients on average</td>
</tr>
</tbody>
</table>

Will buy more than 10 presents

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Women</td>
<td>72%</td>
</tr>
<tr>
<td>Men</td>
<td>56%</td>
</tr>
</tbody>
</table>

Will buy for more than 10 recipients

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Women</td>
<td>39%</td>
</tr>
<tr>
<td>Men</td>
<td>22%</td>
</tr>
</tbody>
</table>
Clothes, Entertainment and Food & Drink are the most popular gifts

Approximately 3 out of 5 Millennials plan to buy clothes, entertainment or food & drink related presents.

More than half of 35-54 year olds will buy entertainment presents and toys.

Vouchers are the most popular gift for consumers over 75 years old.

Popular gift categories, broken down by age range

<table>
<thead>
<tr>
<th>Category</th>
<th>Ages 18-34</th>
<th>Ages 35-54</th>
<th>Ages 55-74</th>
<th>Ages 75+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothes</td>
<td></td>
<td></td>
<td>53%</td>
<td>62%</td>
</tr>
<tr>
<td>Entertainment</td>
<td></td>
<td>62%</td>
<td>57%</td>
<td>34%</td>
</tr>
<tr>
<td>Food &amp; Drink</td>
<td></td>
<td>57%</td>
<td>55%</td>
<td>26%</td>
</tr>
<tr>
<td>Toys</td>
<td></td>
<td>58%</td>
<td>53%</td>
<td>58%</td>
</tr>
<tr>
<td>Jewelry</td>
<td></td>
<td></td>
<td></td>
<td>41%</td>
</tr>
<tr>
<td>Electronic/Electric Devices</td>
<td></td>
<td></td>
<td></td>
<td>43%</td>
</tr>
<tr>
<td>Vouchers</td>
<td></td>
<td></td>
<td></td>
<td>46%</td>
</tr>
<tr>
<td>Household items</td>
<td></td>
<td></td>
<td></td>
<td>40%</td>
</tr>
</tbody>
</table>
Most gift givers start planning for the Holidays with less than 3 months to go.

3 in 5 start planning for the Holidays with less than 3 months to go.

Men wait longer than women, with 70% of men starting to plan with less than three months to go.

28% of gift givers wait until the final month, and 5% wait until the final week.

### When will you begin planning for holiday shopping?

<table>
<thead>
<tr>
<th>Time Frame</th>
<th>Percentage</th>
<th>Change vs. 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than a week before</td>
<td>5%</td>
<td>+2%</td>
</tr>
<tr>
<td>Less than 1 month before</td>
<td>23%</td>
<td>+2%</td>
</tr>
<tr>
<td>Less than 3 months before</td>
<td>34%</td>
<td>-8%</td>
</tr>
<tr>
<td>3 to 6 months before</td>
<td>25%</td>
<td>+4%</td>
</tr>
<tr>
<td>6 months but less than 1 year</td>
<td>9%</td>
<td>-2%</td>
</tr>
<tr>
<td>1 year or more in advance</td>
<td>3%</td>
<td>+1%</td>
</tr>
</tbody>
</table>

62% less than 3 months

- 4% vs. 2015

55% of women

70% of men

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Over one-third of consumers will research and buy presents online

More than a third of gift givers will either research or buy presents online. Only 8% of consumers say they will research and shop exclusively in-store. Nearly 7 in 10 consumers, especially women, say it depends – mostly on deals and convenience, but also on time.

Will you shop or research gifts online and/or in-store?

- I will research and shop online: 38%
- I will research online and shop in-store: 24%
- I will research in-store and shop online: 14%
- I will research and shop in-store: 9%
- Both: 8%
- None of these: 2%

Determining factors:

- Deals: 69%
- Convenience: 65%
- Time: 43%
- The weather: 15%
- Other: 12%

38% research online (-3% vs. 2015)
33% shop online (0% vs. 2015)
29% of online shoppers will use multiple devices for shopping & research

Over 3 in 5 consumers will research and shop online using one device, with desktop being the most popular device.

For those shopping online across devices, researching on mobile and shopping on desktop is most popular.

Using one device: 43%
- 37% - 12% vs. 2015
- 15%
- 12%

Using multiple devices: 29%
+ 5% vs. 2015
- Research on mobile, shop on desktop
- Research on desktop, shop/buy on mobile
- Research on tablet, buy on desktop

**Other: 7%**
Media Consumption Habits During the Holiday Season
Almost half of consumers will spend more time online during the holiday season

47% of consumers expect to spend more time online during the holiday season.

Owners of game consoles, smart TVs and tablets are especially likely to spend more time online.

Increased time spent on devices during the holiday season by devices owned

- **47%** spend more time online
  - 0% vs. 2015

- **59%** watch more television
  - 0% vs. 2015

- **51%** spend more time on laptops
  - +2% vs. 2015

- **53%** spend more time on tablets
  - +1% vs. 2015

- **49%** spend more time on desktops
  - -1% vs. 2015

- **53%** spend more time on smartphones
  - 0% vs. 2015

- **61%** play more video games
  - +1% vs. 2015

- **81%** spend more time on smart watches
  - -1% vs. 2015
Nearly 3 out of 5 consumers expect to watch more TV during the holidays

58% of all consumers will watch more TV during the holidays
-9% vs. 2015

69% of millennials will watch more TV during the holidays
-11% vs. 2015

% who will watch more TV during the Holidays compared to the rest of the year
Consumers will watch more movies during the Holidays than the rest of the year

1 in 5 consumers plan to go to the cinema more over the Holiday period than the rest of the year.

Nearly two-thirds of those under 55 say they are likely to go watch more movies during the Holidays.

Go to the movies more during the Holidays compared to the rest of the year

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ages 18-34</td>
<td>35%</td>
</tr>
<tr>
<td>Ages 34-54</td>
<td>28%</td>
</tr>
<tr>
<td>Ages 55-74</td>
<td>11%</td>
</tr>
<tr>
<td>Ages 75+</td>
<td>6%</td>
</tr>
</tbody>
</table>
Social Sharing Habits During the Holiday Season
Online sharing activity increases during the Holidays

1 in 3 consumers say they will share more content online during the Holidays than the rest of the year.

18-34 year olds are twice as likely to share more content online during the festive season.

Typical Sharing

72% of consumers share content online

• On average, users share content at least once daily.
• Women are more likely to share content every day.
• 18-34s share content every couple of hours.
• Users over 55 share every couple of days.

Holiday Sharing

1 in 3 users will share more content over the Holidays

2 in 5 users ages 18-34 will share more content over the Holidays
Festive pictures, videos & gift ideas will be the most commonly shared content

Nearly 2 out of 3 consumers will share festive pictures this holiday season.

Consumers under 35 are significantly more likely to share content online during the Holiday season.

Men are more likely to share travel deals, while women are busy sharing festive pictures.

### Holiday Content Sharing

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Festive pictures</td>
<td>65%</td>
</tr>
<tr>
<td>Festive videos</td>
<td>49%</td>
</tr>
<tr>
<td>Present ideas</td>
<td>45%</td>
</tr>
<tr>
<td>Sales and promotions</td>
<td>43%</td>
</tr>
<tr>
<td>Christmas recipes</td>
<td>41%</td>
</tr>
<tr>
<td>E-cards</td>
<td>36%</td>
</tr>
<tr>
<td>Wish lists</td>
<td>30%</td>
</tr>
<tr>
<td>Adverts</td>
<td>30%</td>
</tr>
<tr>
<td>Travel deals</td>
<td>27%</td>
</tr>
</tbody>
</table>

Of those who shared **festive pictures**:
- 72% were women
- 58% were men

Of those who shared **travel deals**:
- 23% were women
- 32% were men
82% of all online holiday sharing is via dark social

The majority of social sharing of Holiday content takes place on “dark social” channels such as email, IM and text messaging.

Desktop sees higher sharing than mobile, though both devices play an important role.

Sharing by Device

- 57% Desktop
- 43% Mobile

Sharing by Channel

- 82% Dark Social
- 8% Facebook
- 3% Twitter
- 7% Other
Smartphones & laptops are used most for sharing holiday-related content

Laptops are the most likely device for sharing Holiday content, apart from festive pictures and videos, which will mostly be shared on smartphones.

Approximately 1 in 4 consumers will share content on their tablets as well.

Type of Content Shared, by Device

<table>
<thead>
<tr>
<th></th>
<th>Festive videos</th>
<th>E-cards</th>
<th>Travel deals</th>
<th>Adverts</th>
<th>Sales and promotions</th>
<th>Festive pictures</th>
<th>Holiday recipes</th>
<th>Wish lists</th>
<th>Present ideas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>43%</td>
<td>35%</td>
<td>39%</td>
<td>39%</td>
<td>42%</td>
<td>49%</td>
<td>39%</td>
<td>38%</td>
<td>41%</td>
</tr>
<tr>
<td>Laptop</td>
<td>34%</td>
<td>39%</td>
<td>42%</td>
<td>39%</td>
<td>41%</td>
<td>34%</td>
<td>38%</td>
<td>39%</td>
<td>38%</td>
</tr>
<tr>
<td>Tablet</td>
<td>27%</td>
<td>26%</td>
<td>19%</td>
<td>24%</td>
<td>22%</td>
<td>25%</td>
<td>23%</td>
<td>21%</td>
<td>24%</td>
</tr>
<tr>
<td>Desktop computer</td>
<td>21%</td>
<td>27%</td>
<td>23%</td>
<td>20%</td>
<td>21%</td>
<td>21%</td>
<td>22%</td>
<td>21%</td>
<td>19%</td>
</tr>
<tr>
<td>Smart TV</td>
<td>5%</td>
<td>6%</td>
<td>6%</td>
<td>9%</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
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<td>2%</td>
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<td>3%</td>
</tr>
<tr>
<td>Games console</td>
<td>1%</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
<td>0%</td>
<td>2%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Smartwatch</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>
Sharing rockets during Black Friday & Cyber Monday!

Sharing activity on Black Friday and Cyber Monday is approximately twice as high as the average of the rest of the Holiday season.

Holiday sharing increases throughout November and drops on Halloween and Christmas Eve.

Holiday Retail Sharing Trends (October – December 2015)
Key Takeaways

We see three key strategies to help marketers maximize their promotions during this Holiday season:

Understand consumer’s holiday shopping behaviors
Know the importance that smartphones, tablets, laptops and desktops play in both researching and purchasing holiday gifts.

Increase promotions across all screens
While TV advertising is certainly effective during the holidays, marketers cannot ignore the increased media consumption on smartphones, tablets, and other devices.

Deliver holiday content that consumers will want to share
Make it easy for consumers to share pictures, videos, gift ideas and other festive content.
RadiumOne Delivers Holiday Bonanza

CHALLENGE

- Needed to get in front of gift givers during holiday shopping season
- Big competition against brick and mortar and e-commerce retailers

SOLUTION

RadiumOne identified high-value “holiday sharers” – those who were extremely active in sharing holiday content such as photos, videos and wish lists via apps, websites, social, email, IM and other channels.

Targeted 10M high-value prospects who held same interests and intent as these holiday sharers.

RadiumOne made more than 35 mid-flight adjustments to optimize the campaign.

RESULTS

10x return on digital investment

50% of conversions from 15% of impressions through Social Analytics

12x CPA better than average from social
RADIUMONE

Connections that matter

RadiumOne is the only data-driven marketing company that connects the dots between brands’ paid, earned, shared and owned assets to find and connect with high-value consumers. Through our ability to see the strongest signals of consumer intent and predict where consumers are on their journeys, we can build customized campaign strategies specific to your brand. RadiumOne delivers digital campaigns that are measured against real business outcomes. Headquartered in San Francisco, we have offices across North America, Europe and Asia-Pacific.

To learn more about RadiumOne, please visit www.radiumone.com

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