Modern Mobile Consumer 2022: Holiday marketing playbook

Learn how to reach engaged, passionate consumers this holiday season

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Introduction

This year, the holiday season is marked by **big changes in consumer behavior** - as shoppers everywhere are adapting to a volatile global economy and a new post-COVID lifestyle.

That's why ironSource and M&C Saatchi Performance partnered up to provide marketers a playbook on how to navigate the new holiday landscape. Our report is split up into three parts to give you the most comprehensive insights:

I.   **Consumer insights:** Leveraging first-party data from ironSource's MobileVoice® market research solution, you'll get exclusive statistics on who's shopping, how consumers are engaging with their phones, and more.
II. **Trends in eCommerce:** Learn what makes this season unique from others and why, pulled from research by M&C Saatchi Performance.
III. **Our perspective:** Get expertise from the experts themselves at ironSource and M&C Saatchi Performance, with an inside look at how to master your strategy and beat the competition.

Read on for valuable insights, tips, and tricks to make the most of your marketing strategy this winter.
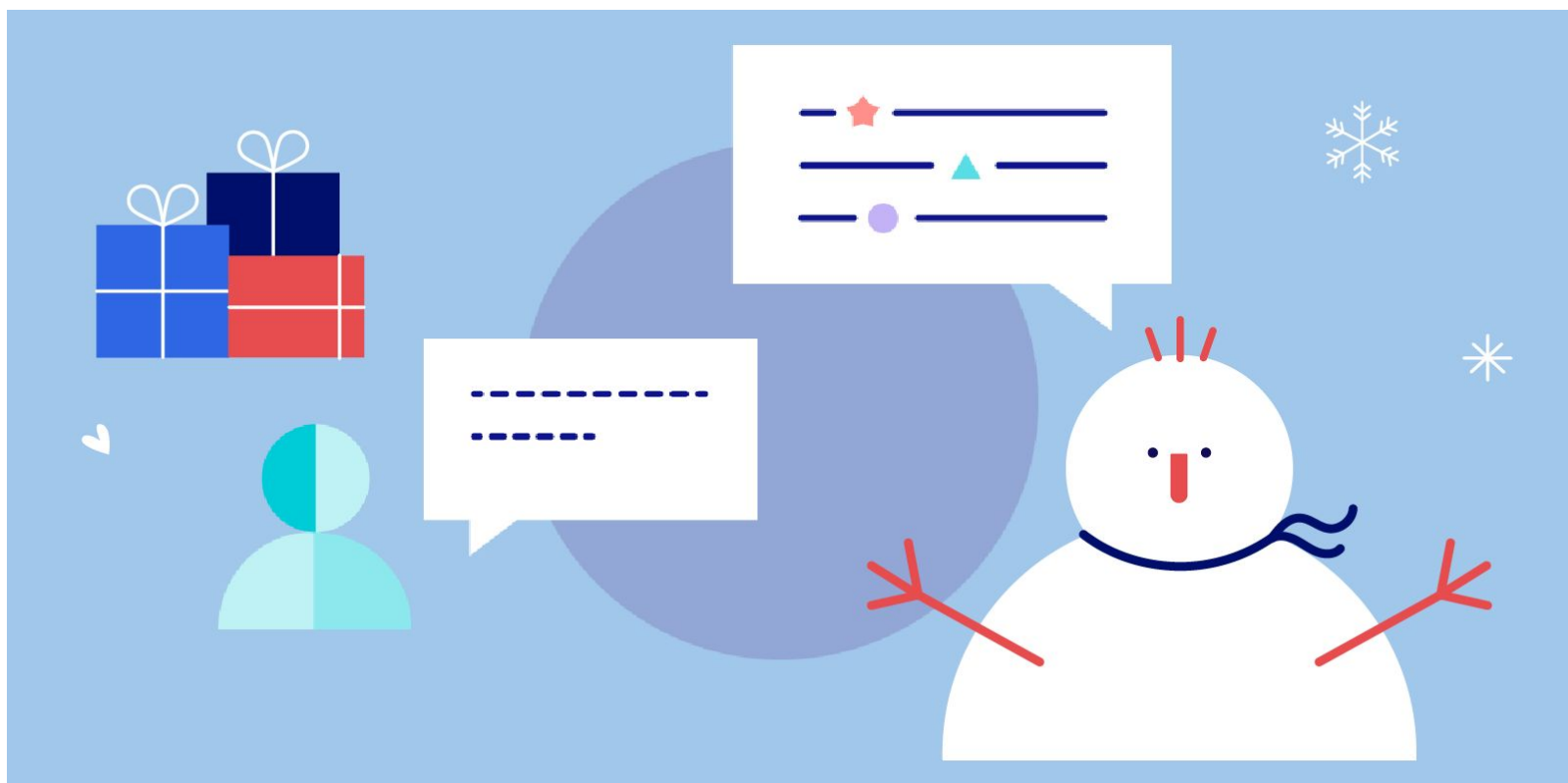
Key findings

Holiday shopping habits

- Women (**84%**) are more likely to make holiday purchases than men (**67%**)
- Most consumers (**65%**) will spend the same, or even more than they did in 2021
- General merchandise retailers (**75%**) are the preferred shopping destination
- Most consumers (**64%**) will use their mobile phone or tablet to shop

Gift giving habits

- More than any other demographic, parents (**75%**) enjoy gift giving the most
- Clothes and footwear are the most popular gifts (**75%**)

Mobile advertising

- Rewarded ads influence purchasing decisions for **40%** of consumers

Black Friday and Cyber Monday

- The fall (**28%**) and Black Friday/Cyber Monday (**27%**) are the most popular times to shop for the holidays

I. MobileVoice® Consumer insights

The holidays are still about deeper meaning, being with loved ones, and the joy of giving. When asked what they enjoy most about the holiday season, **69%** said connecting with family and friends, **64%** said giving gifts and **49%** said receiving gifts.

This makes the holiday season a huge opportunity for marketers to reach **engaged, passionate** consumers. **64%** of consumers plan to use their mobile phone or tablet to shop this holiday season, making the opportunity for advertisers especially huge on mobile.

Using ironSource's MobileVoice® market research solution, we explored consumer behavior on the following topics:

1. Holiday shopping habits
2. Gift giving habits
3. Mobile advertising
4. Black Friday and Cyber Monday
5. Mobile gaming

1. Holiday shopping habits

The holidays wouldn't be the same without the shopping frenzy. Here's a look at who's shopping, what their budgets look like, and where and what they're purchasing.

Who is shopping?

- **74%** of consumers will make holiday purchases this year
- **84%** of women will make holiday purchases
- **67%** of men will make holiday purchases

Nearly everyone will participate in the shopping frenzy: just 12% said they'll be sitting it out this year and 14% are unsure whether they'll be participating. This figure is largest for parents who have Santa letters to answer, with 86% planning to go holiday shopping. Women are also more likely than men to make holiday purchases.

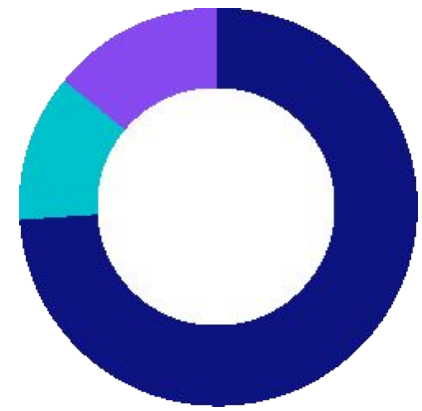*Q: Will you make holiday purchases this year?*
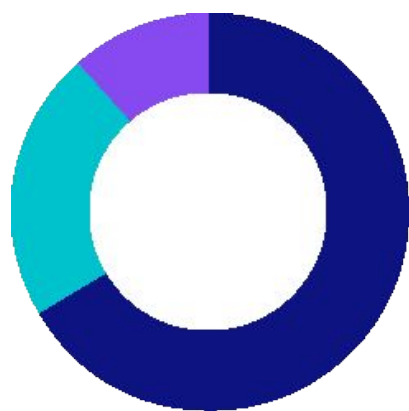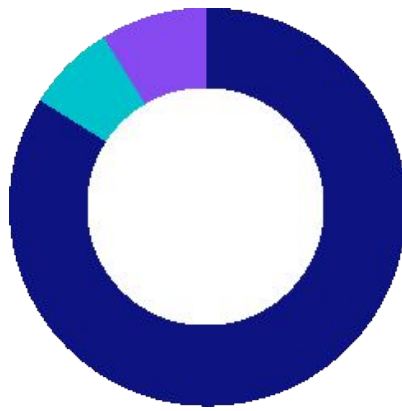
Men   Women   All consumers

● Yes   ● No   ● I don't know

Takeaway: Your advertising strategy should be inclusive of everybody but especially catered to the core shoppers, moms.

What do shopping budgets look like?

- **35%** of consumers plan to spend more on holiday gifts this season than last season. **30%** of consumers plan to spend the same amount
- **26%** of consumers plan to spend between $251-$500 on holiday shopping this year, making it the most popular price range

14% of consumers plan to spend more than $1,000, with Gen X the most likely to spend this much. The youngest generation, Gen Z, on the other hand, is most likely to keep budgets under $500, with 70% indicating such, and the most likely to spend less than $100.

Q: How much do you plan to spend on holiday gifts?

Legend: Total, Gen Z, Millennials, Gen X, Parents
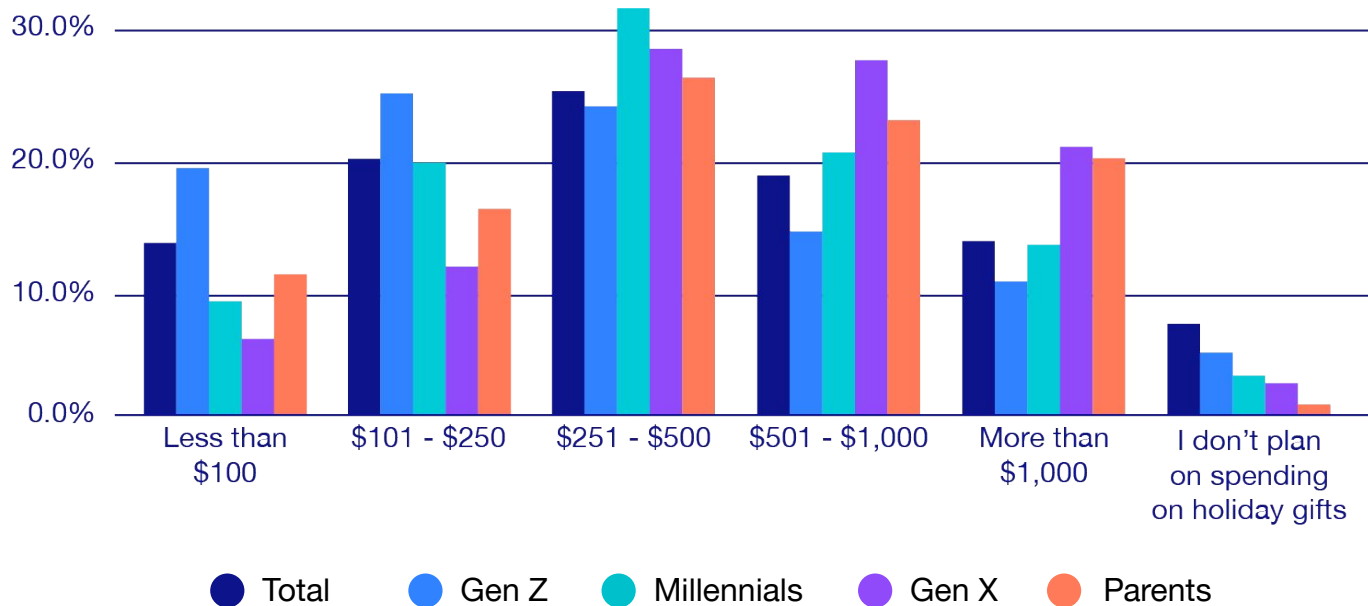
Takeaway: *Gen X (which is more likely to include parents) is the demographic to pay attention to, especially for big ticket items like cars, appliances, jewelry, etc.*

Where are consumers shopping?

- **75%** of consumers will choose to shop from general merchandise retailers, like Amazon, Target, and Walmart
- **50%** of parents will choose to shop directly from brands, as well

In the midst of the holiday frenzy, consumers value convenience - preferring to purchase all of their gifts at once from the same store, ranging from clothing to electronics to pet supplies.

That said, parents will also turn to brands directly - it's likely their kids have specified exactly what they want and the brand itself is the most likely place to find it. In an effort to support local businesses, 40% plan to make purchases from them, with Gen X the most likely at 50%.

Q: What type of retailers will you shop from this holiday season?

Legend: Total | Gen Z | Millennials | Gen X | Parents | Male | Female | Nonbinary
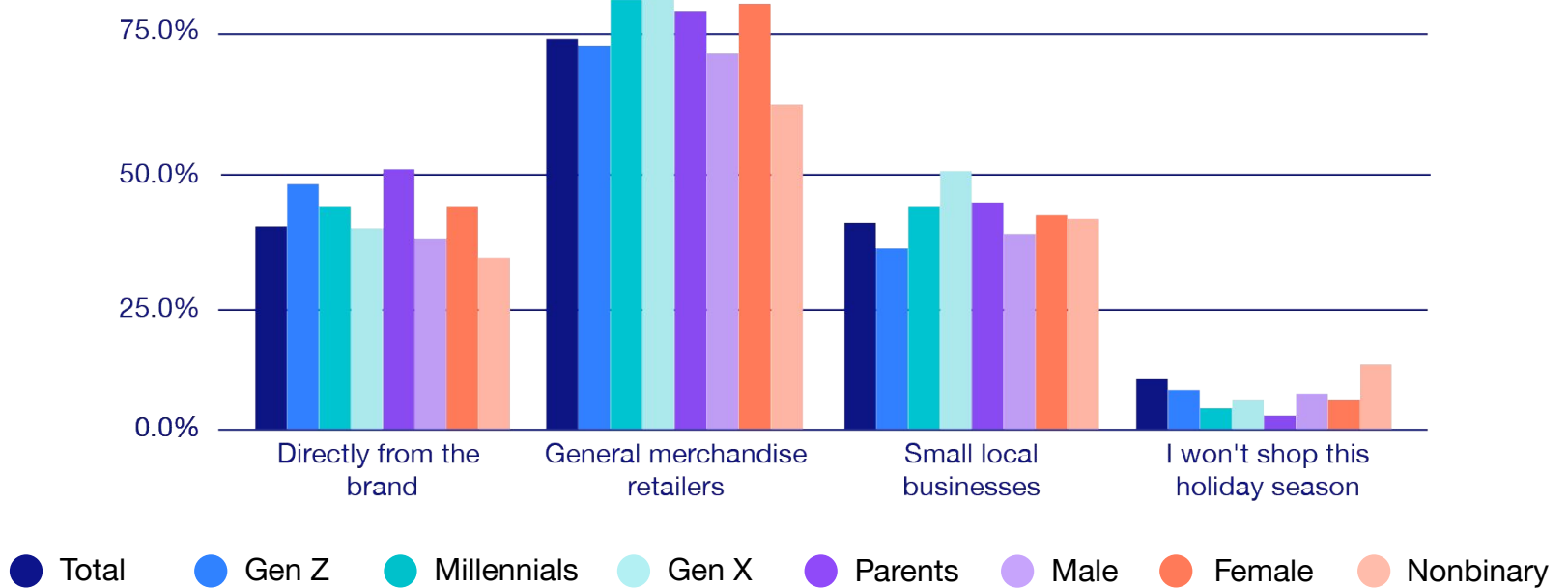
Takeaway: *Shoppers value convenience. Be sure to highlight all the ways consumers can easily purchase your products during the holiday craze.*

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How will consumers shop?

- **64%** of consumers plan to use their mobile phone or tablet to shop
- **62%** of consumers prefer to use mobile apps when turning to their mobile devices to shop
- **59%** of consumers would be encouraged to download a new shopping app for holiday shopping after seeing an ad for it

While consumers used to rely on brick-and-mortar alone, many are now turning to their phones to check off their gift lists. Shopping apps are the most preferred way to shop on mobile or tablet. Rewarded offers in games (similar to in-app purchases) are also a popular way to shop on mobile, with 26% of consumers purchasing items directly from the rewarded offer.

Consumers are also open to downloading new apps for holiday shopping, meaning it's still worth acquiring users even after holiday shopping has begun.

Q: How will you use your mobile phone or tablet for holiday shopping this year?
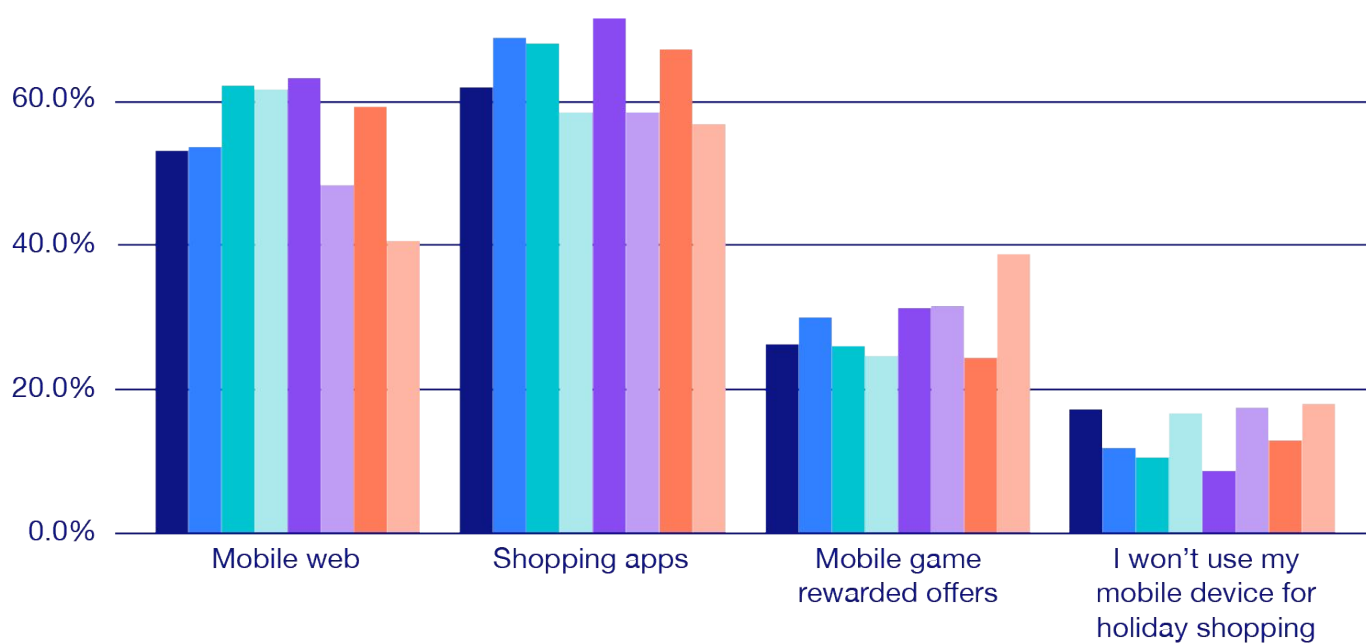
Legend: Total, Gen Z, Millennials, Gen X, Parents, Male, Female, Nonbinary

Takeaway: It's critical to highlight your app touchpoint so you don't miss out on a large amount of shoppers turning to their phones.

For shopping apps, now's a good time to get installed before consumers have finished their holiday shopping. Learn more about running a campaign with ironSource.

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2. Gift giving habits

Giving gifts is a meaningful part of the holidays - and the data confirms it. Here's a look at who is giving and receiving gifts, what they're purchasing, and more.

Who is giving and receiving gifts?

- **75%** of parents say they enjoy gift giving during the holidays, more likely than any other demographic
- **61%,** the majority, of consumers will give gifts to the children in their families
- Nearly **50%** of Gen Z and Millennials plan to give gifts to their pets this year

64% of consumers say they enjoy the gift giving aspect of the holidays and 48% say they enjoy receiving gifts - receiving gifts is the least important part of the holidays. Parents were more likely than any other demographic to say gift giving was a season highlight and Gen X is the least likely to enjoy gift giving.

While Gen Z, the youngest, is the most likely to say that receiving gifts is important to them, Gen X, the oldest, is the least likely to.

Q: What do you enjoy about the end of year holiday season?

Legend: ● Total ● Gen Z ● Millennials ● Gen X ● Parents ● Male ● Female ● Nonbinary
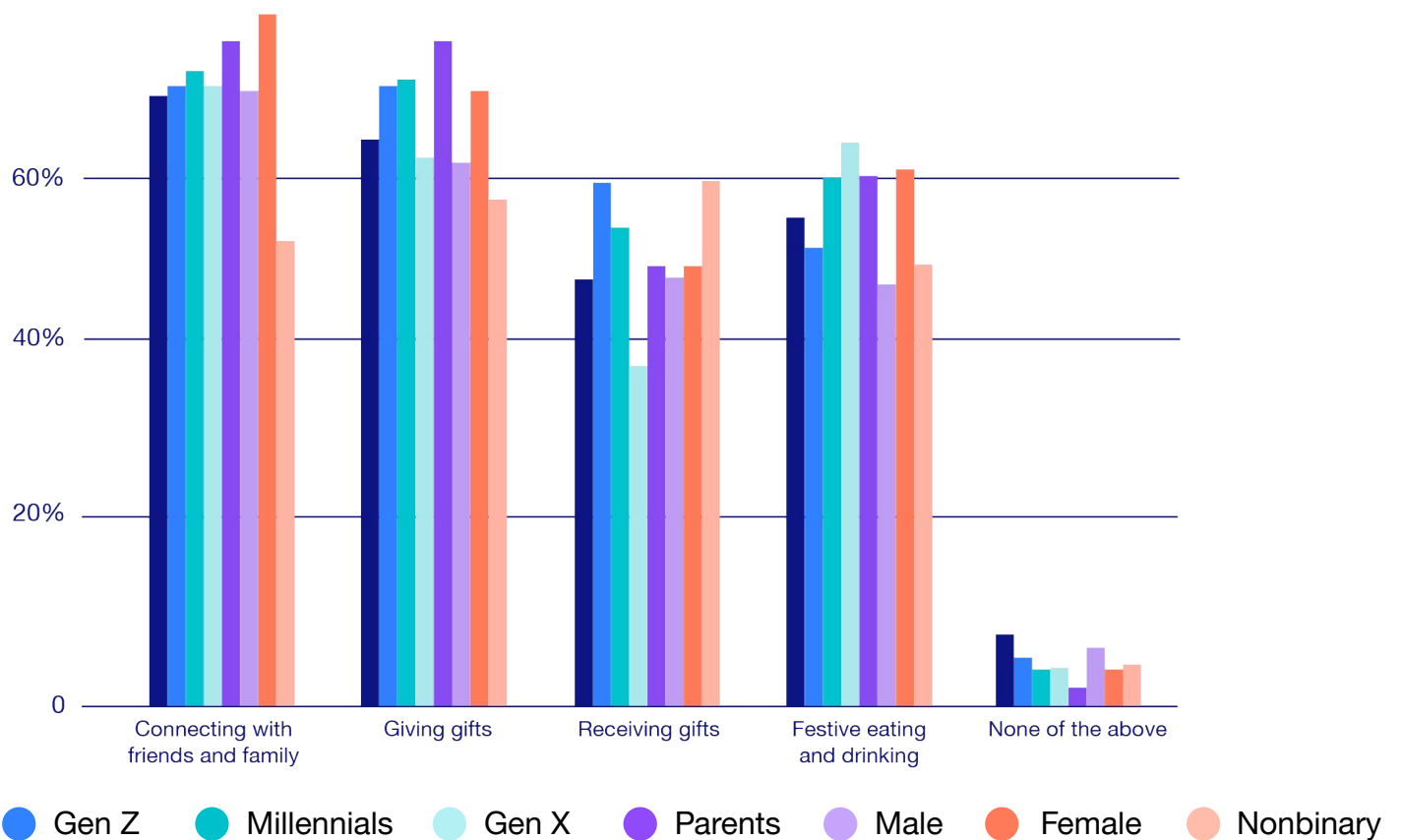
Takeaway: *The marketing strategies that reflect an understanding of the sincerity and intimacy that comes with giving will win out this season.*

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What are the most popular gifts?

- **75%** say they plan on purchasing clothes and footwear as gifts this year, making them the most popular gifts across all generations

Clothes and footwear top the list but electronics still rank high. Beauty brands will also see a fair share of holiday spend. As the most likely demographic to give gifts, parents plan to gift (1) clothing and footwear, (2) electronics and (3) toys and games.

Q: What do consumers plan to buy as gifts this holiday season?
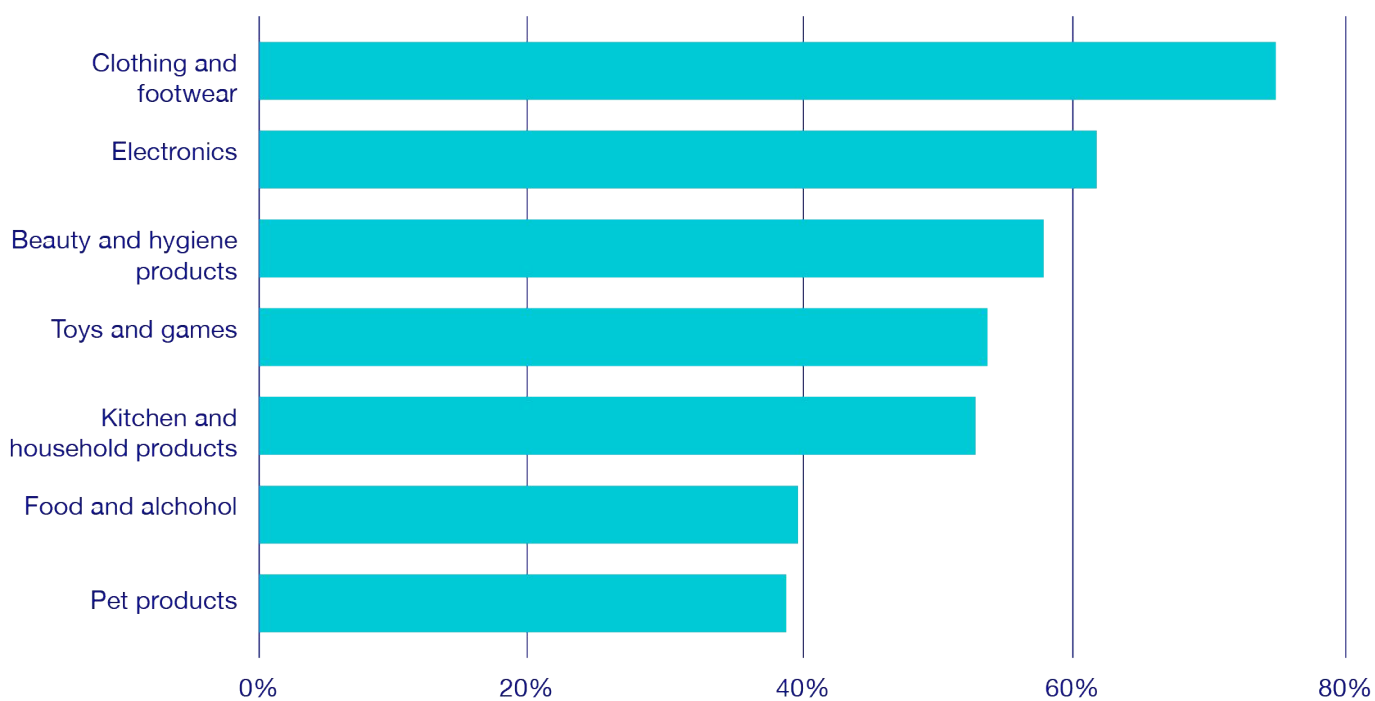
New devices are also a popular gift. 51% of consumers say they would consider giving a new phone over the holidays. 49% said they're likely to buy themselves a new phone this season. Parents are the most likely to upgrade, with 63% looking for a new device to get them through the year.

Takeaway: Put clothing and footwear at the forefront of your advertising strategy, highlighting these products in your creatives or even offering special discounts on certain items.

With the holidays a critical time for device activations, consider smartphones as an advertising channel. On-device advertising allows you to reach users the moment they unbox their newly gifted smartphones and then again throughout the device lifecycle. Learn more about ironSource Aura.

3. Mobile advertising

Mobile ads have a strong influence on consumers' purchasing decisions during the holiday season, notably rewarded ads that offer users a clear value exchange.

- **40%** say that ads that provide rewards influence their purchasing decisions
- **48%** have been influenced by rewarded ads for gift ideas

31% say their purchasing decision have also been influenced by playable ads that are gamified or interactive. Mobile pre-roll and banner ads are effective for just a fraction of consumers. Aligning with their frequent gameplay, parents are the most likely to be influenced by rewarded ads, banner ads, and full screen ads. Gen X is the most likely to not be influenced by any mobile ad unit.

Q: What types of mobile ads influence your holiday purchasing decisions?

Legend: Total, Gen Z, Millennials, Gen X, Parents, Male, Female, Nonbinary
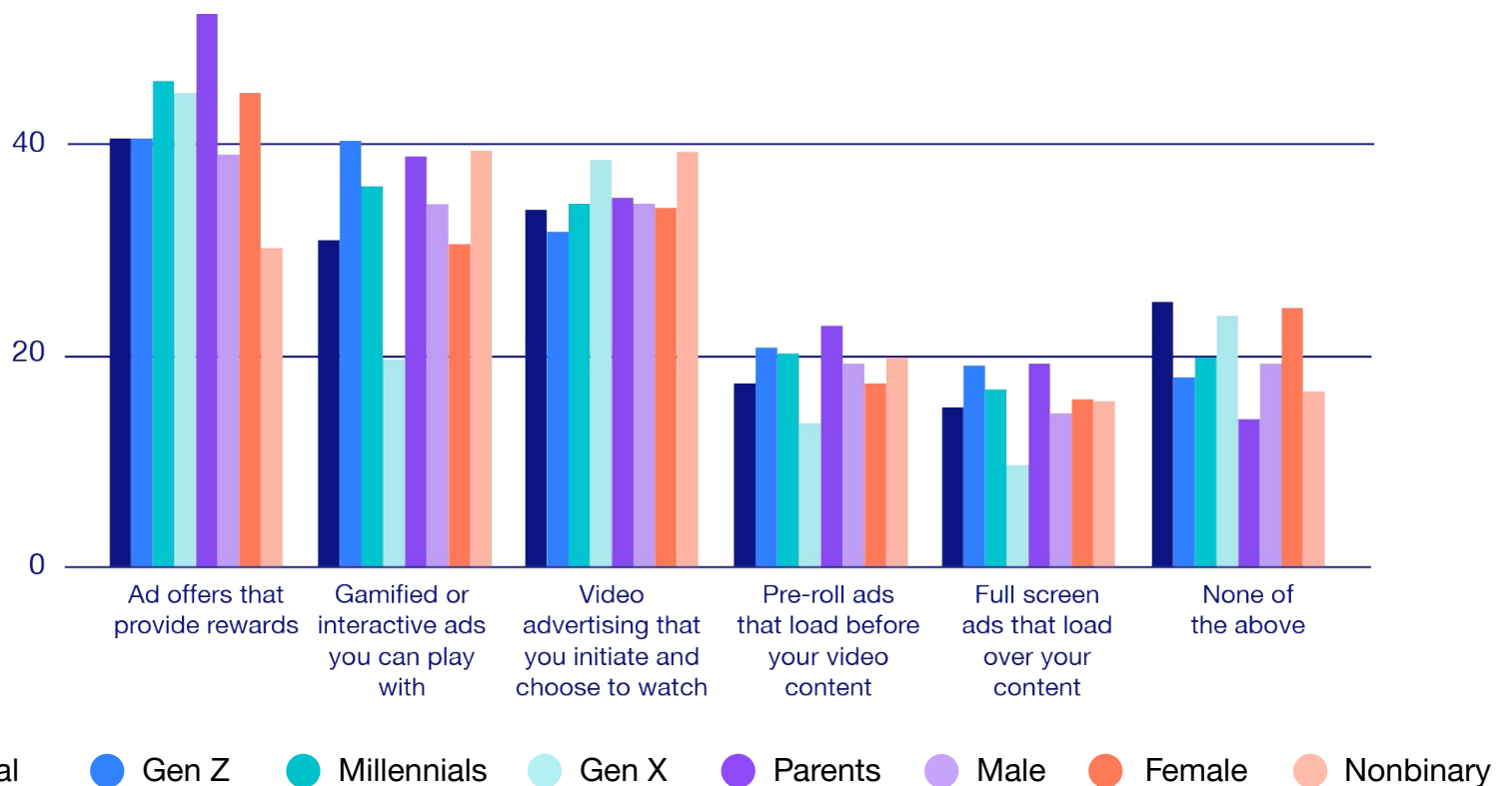
34% of consumers say they'll seek out rewarded offers for new mobile games over the holidays. Other popular rewarded offer types include clothing and footwear brands (57%), self-care brands (44%), beauty brands (43%), and food delivery brands (30%).

Takeaway: *Consumers respond well to rewarded video and the offerwall. Utilizing these ad units are a unique and valuable way to reach a new audience and ensure consumers are open to seeing your ad.*
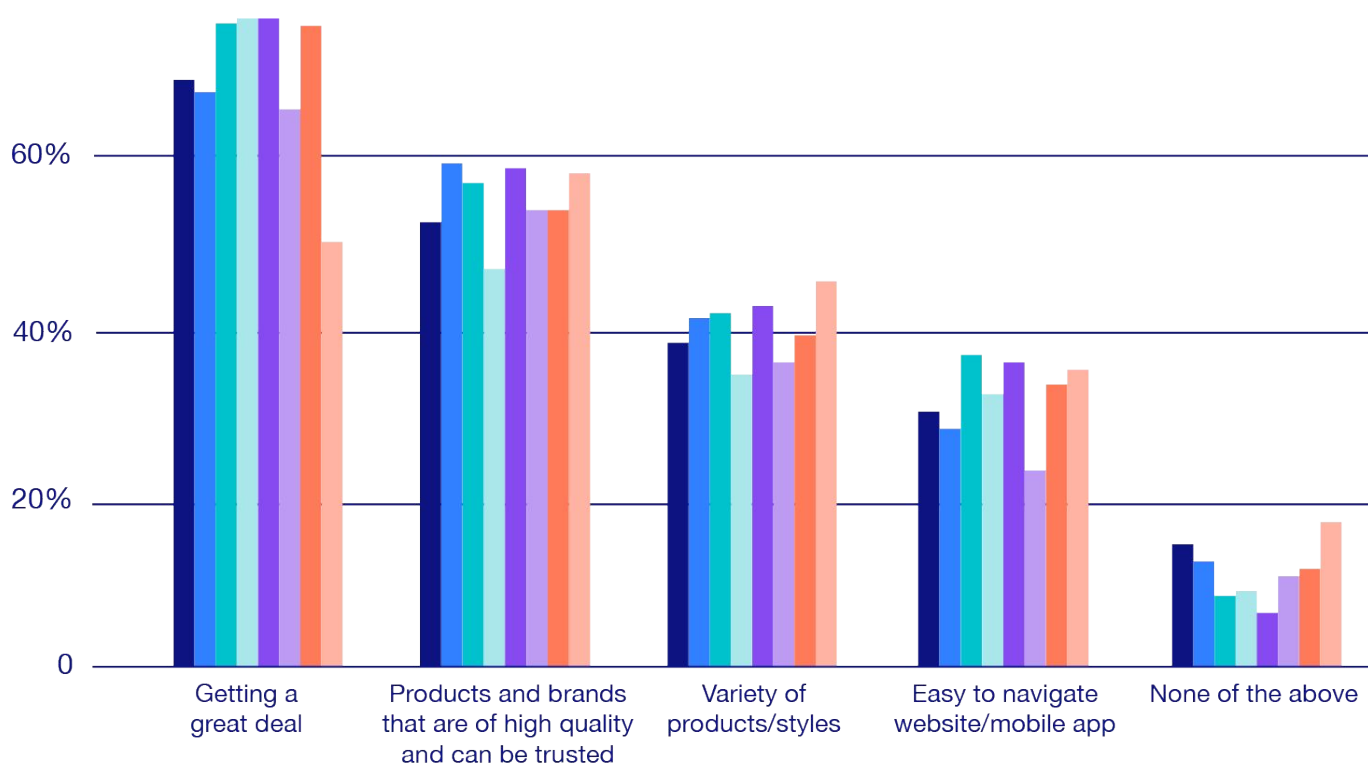
4. Black Friday and Cyber Monday

Black Friday and Cyber Monday make headlines every year for being the biggest shopping days. Not leveraging these dates, especially on mobile, is a missed opportunity.

- **64%** of consumers will participate in Black Friday shopping
- **28%** of consumers shop for the holidays in the fall and **27%** shop for the holidays on Black Friday/Cyber Monday
- **70%** of consumers say that getting a great deal is the most likely factor influencing their purchasing decisions during the shopping holidays

It's important to show value if you want to be successful on Black Friday and Cyber Monday - getting a great deal is the most likely factor influencing consumer purchasing decisions during the shopping holidays. Expect clothing and shoes to be some of the most sought-after items, with 64% of consumers likely making purchases within the category.

Q: What is most likely to influence your purchase decisions on these days?

Legend: Total, Gen Z, Millennials, Gen X, Parents, Male, Female, Nonbinary

X-axis categories: Getting a great deal | Products and brands that are of high quality and can be trusted | Variety of products/styles | Easy to navigate website/mobile app | None of the above

Takeaway: Consumers care heavily about Black Friday and Cyber Monday, and it's likely because of the jaw-dropping deals. Consider offering similar big sales throughout the year at critical times, back to school shopping, spring cleaning, etc.

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5. Mobile gaming

During the rush of the holiday season - traveling, shopping, parties, and spending time with family and friends - users turn to their phones to play mobile games daily, making it an excellent advertising channel for your brand.

How much time do users spend on mobile games during the holidays?

- **70%** play mobile games daily during the holiday season
- **41%** say they'll game multiple times each day
- **42%** of users play over an hour every day over the holiday season

Users will play mobile games daily over the holiday season and 74% will buy at least one mobile game during this time. Users are also playing a considerable amount. Parents tend to have less time to themselves when the kids are not in school, but 73% still squeeze in 30 mins or more on mobile games.

Q: On average, how many minutes a day do you play mobile games during the holidays?
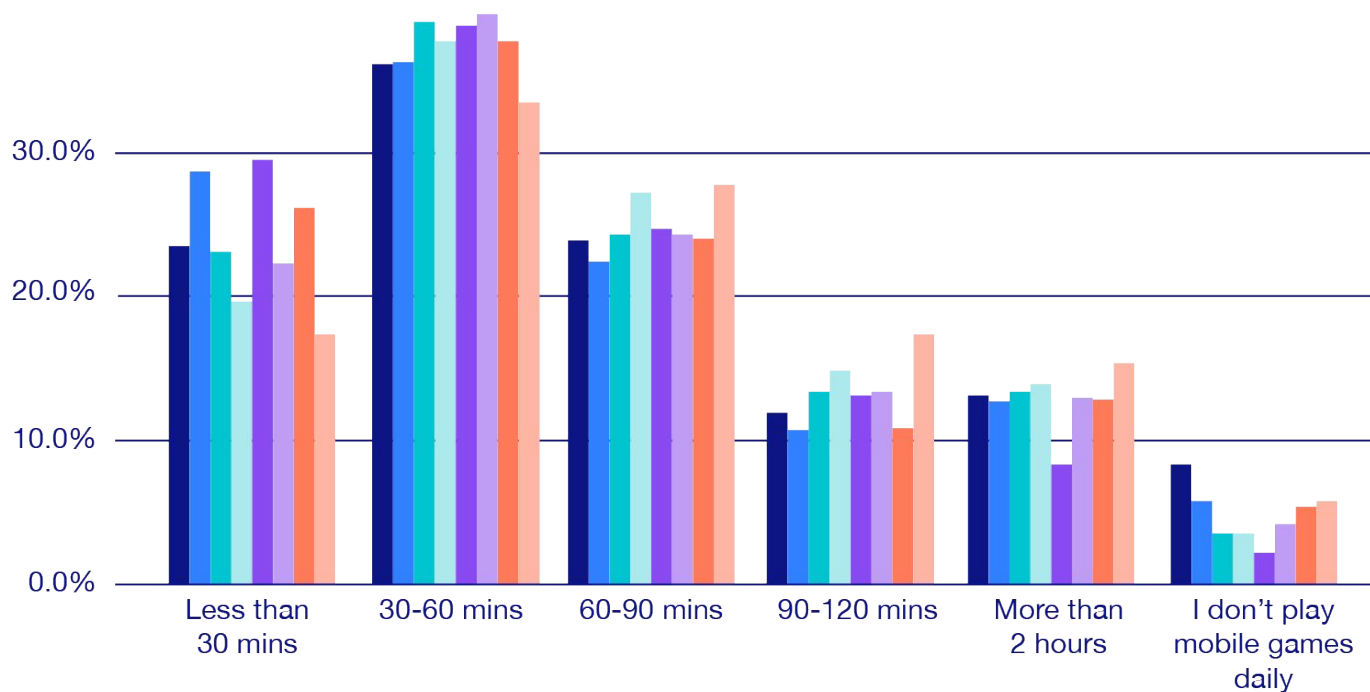
Legend: Total, Gen Z, Millennials, Gen X, Parents, Male, Female, Nonbinary

Takeaway: *Every audience is active on mobile games during the holiday season. Advertising on these channels is a surefire way to reach your audience, no matter who they are. Learn more about running a campaign on mobile games with ironSource.*

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Who do users game with?

- **57%** of users will join friends, family, or romantic partners in mobile gaming during the holidays
- **67%** of Gen Z will play with friends or family during the holidays

When surrounded by loved ones in the holiday spirit, users are likely to invite others to join in on the fun - it's a family affair. Gen Z is the most likely to prefer playing with friends or family, making them a critical path to reach more than one audience with one campaign.

Q: Who do you generally play mobile games with during the holidays?

Legend: Total, Gen Z, Millennials, Gen X, Parents, Male, Female, Nonbinary
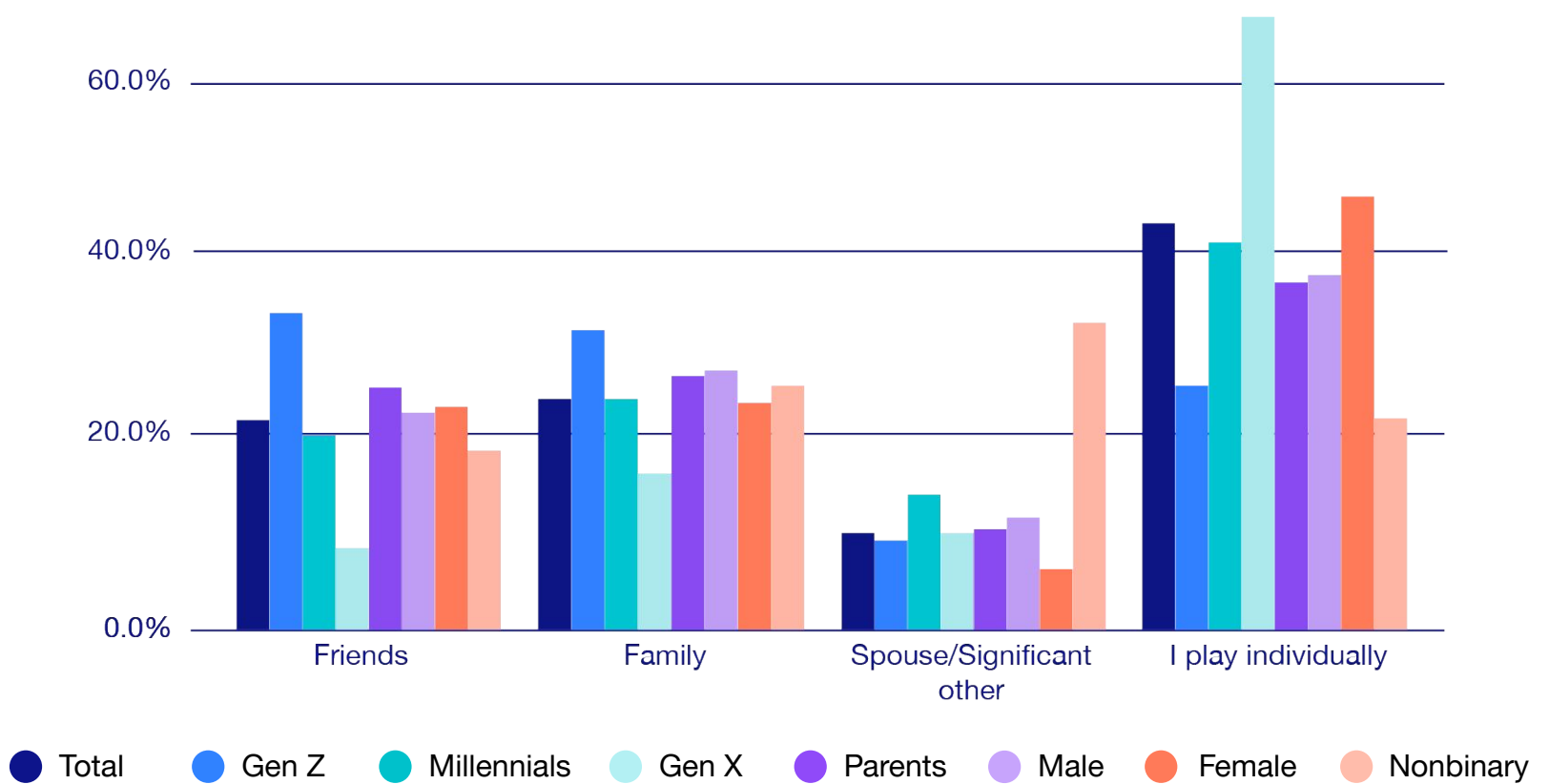
Takeaway: *Advertise on mobile games to reach multiple audiences with the same creative.*
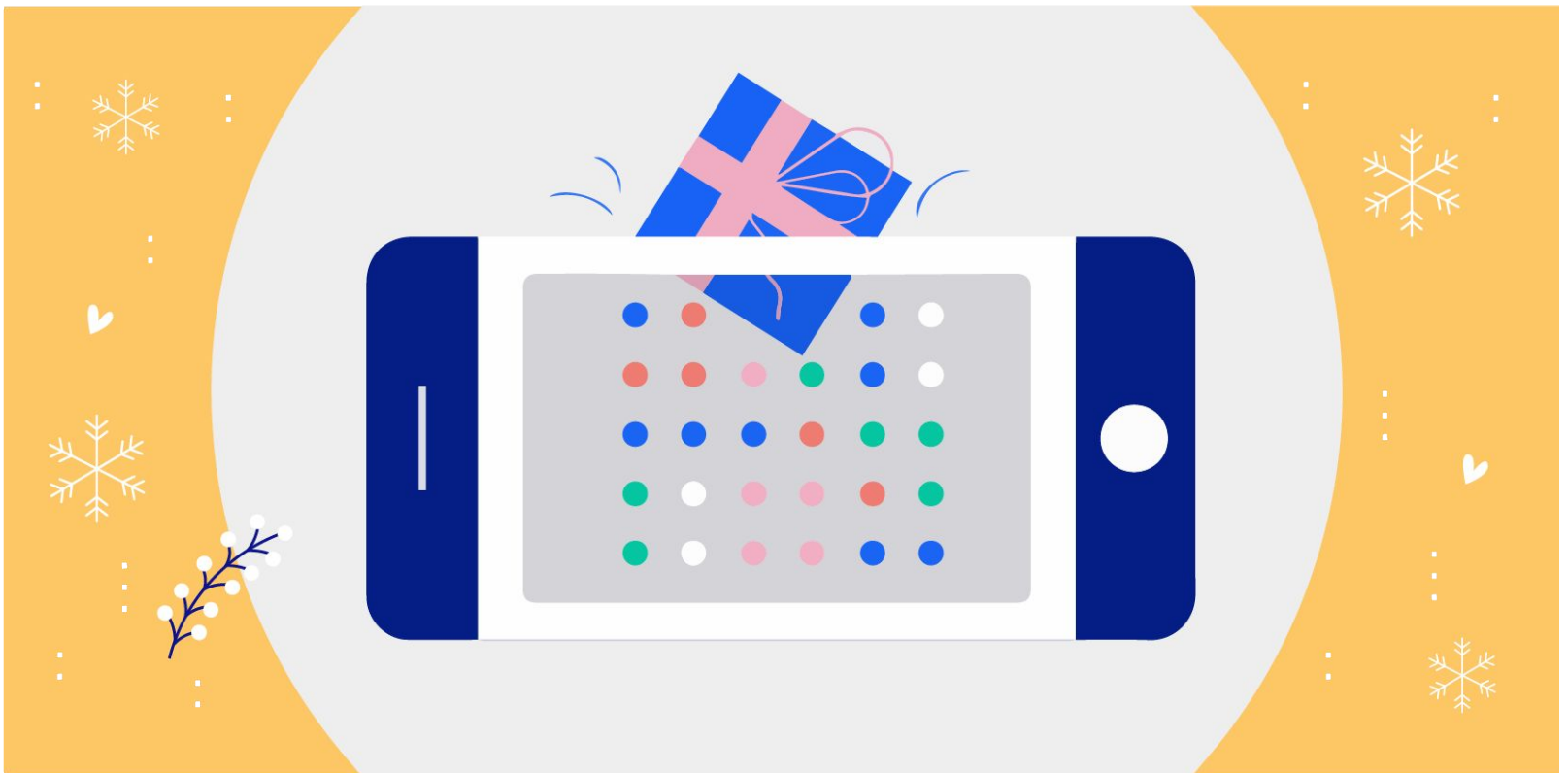
II. M&C Saatchi Performance: Trends in eCommerce

eCommerce has become the norm in the post-COVID era, which is why M&C Saatchi Performance explored key trends shaping the landscape this year. In fact, eCommerce sales totaled $870 billion in the US in 2021, a 14.2% increase over 2020 and a 50.5% increase over 2019 (Forbes). During the holidays, eCommerce sales rose by 10.4% to $204.20 billion (Insider Intelligence).

This year, you should expect a similar increase, along with some key changes. After all, 89% of consumers in the US expect inflation to impact their 2022 holiday shopping (Numerator). Read on for some important trends to keep in mind this holiday season.

Reach users as early as possible… consumers will shop earlier to avoid setbacks

Last holiday season, supply chain issues resulted in 6B out-of-stock messages being sent to consumers when ordering online. On top of that, inflation has led to higher prices. That's why this year, 37% of shoppers in the US plan to start shopping earlier (Salesforce), to snag products before prices rise too much and to ensure they don't face supply-chain issues.

Offer rewards and discounts… rising prices will encourage consumers to shop from cheaper alternatives

While the 2021 holiday shopping season in the US generated high YOY growth, the past few months have a brought a significant shift in the US economic climate. 75% of shoppers have less confidence spending money as the rate of inflation soars to a 40-year high. This means 42% of consumers will shop for deals, 40% will stick to a budget, 28% will buy less overall, and 25% will shop in bulk (First Insight).

As part of this trend, 2.5 billion shoppers worldwide are more likely to go for a cheaper alternative this holiday season (Salesforce), even if this means switching brands. This behavior has led to an increased usage of apps like Fetch Rewards and Shein that provide affordable prices, rewards and discounts.

Get integrated with a Buy Now, Pay Later (BNPL) program… consumers may be more likely to make purchases when BNPL is offered

The usage of credit cards in the US has declined - 39.4% of US consumers now turn to alternative payment methods to avoid credit card interest (Insider Intelligence). This has paved the way for Buy Now, Pay Later (BNPL) programs which allow consumers to purchase items and pay for them over the course of a few months, with low- or no-interest financing options.

With customers more likely to make an impulse purchase when BNPL is offered, retailers that have partnered with the BNPL service, Klarna, have seen a 30% increase in conversion rates and a 41% increase in order value (Forbes). On top of that, spending on BNPL in the US increased by 230% (Forbes) last year and is expected to increase 274% between 2021 and 2026 (Juniper). One edge that BNPL has? Smartphones. Auto-fill form functions can make applying for BNPL frictionless (Statista).

Perfect the convenience of your app… smaller general merchandise retail apps will see more installs

Over the past few years and as a result of COVID, consumers have become comfortable ordering goods and services online, embracing it's value and convenience.

This has led to smaller, general merchandise retail apps seeing significant increases in downloads in 2021 compared to 2020 - Shein downloads increased 24%, and Etsy downloads increased 27%. While top shopping app downloads slowed slightly, active users grew. Amazon saw a 10% increase in active users, and Walmart saw a 16% increase. (data.ai formerly App Annie)

Put food and groceries at the forefront of your strategy… consumers will adjust how and where they spend on groceries

Compared to other verticals, the most amount of consumers, 69%, have noticed a surge in the price of groceries followed by the cost of dining out. Due to these price increases, 97% of consumers are re-prioritizing how they spend, with groceries being the most important factor to consider (First Insight). Due to these increases, many users are choosing to cook at home more often and dine out less.

This, along with the effects of COVID, has led consumers to order their food and groceries online. In fact, food and beverage e-commerce grew 170%, representing 9.6% of all grocery sales in 2021 (Forbes). This trend is expected to continue into this year's holiday season. According to MobileVoice®, 44% of consumers and 58% of parents plan to use a grocery or meal delivery service this season. 43% of consumers also expressed interest in grocery or meal subscriptions, while 34% wouldn't say no to a wine subscription.

III. Our perspective: Performance marketing tactics for the 2022 holidays

Q&A with Sarah Chafer
VP of US Ad Sales at ironSource

Sarah Chafer is the Vice President of US Ad Sales at ironSource where she is responsible for performance and brand sales revenue growth and product adoption. A veteran of the mobile advertising company Tapjoy, acquired by ironSource in 2021, she has been with the company since 2009 and saw them through the transition from web-based advertising to mobile in 2010. Prior to joining ironSource and Tapjoy, Sarah was a Media Director at Medley Inc., a global digital agency responsible for dating brands. There she was responsible for the user acquisition and affiliate sales team.

How do you recommend brands evaluate how much spend should go towards mobile ads vs. desktop, OOH, etc.?

Be sure to focus on key trends in how people are shopping today, as it's drastically changed from several years ago. For example, just consider the increasing engagement with devices and how retailers have made it easier to shop online.

Mobile devices will continue to evolve and innovate, meaning they need to be heavily considered for holiday shopping.

What advice would you offer a brand that is new to performance marketing?

Compare YoY data from different points on the sales funnel to see what works and what doesn't, taking into account how engagement has changed across platforms.

What's the difference between advertising in mobile games vs. mobile web?

When users are playing mobile games, they are often in their element and enjoying what they're doing, which makes them highly engaged. It also makes their interactions with advertisers a positive experience - so long as the ads are presented in the best way. Be prepared to meet consumers on the platforms where they're most engaged, and at times they're most engaged.

How do rewarded ads work for brands?

With rewarded ad formats, your users get a clear value exchange for interacting with your brand, which creates a highly engaged user in the long term. Giving your audience the resources and opportunity to choose to engage with your ad can be better for your app in the long-run.

How can retail brands make the most of rewarded formats over the holidays?

First, consider running on a cost per action pricing model for rewarded ads units and playables. It's also important to make sure users are aware of your brand values. Despite how well known your brand is, make sure your ad is representative of your mission and goals.

Marketers really need to get back to the idea of brand affinity. How can you sponsor a player's next move, their next level, their next transaction? We think of it as a 360-degree positive experience. The publisher is excited because they're coming up with other ways to get their user to stay in the game, the advertiser is excited because they're finding a unique user, then the user themselves sees the value they're getting from the advertiser, and that builds brand affinity.

Publishers are also multiplying rewards on key holiday weekends. These periods, called Currency Sales, are a mutually beneficial strategy for marketers to tap into. Mark these dates in your calendar.

- Thanksgiving & Black Friday Sale: Nov 24-27
- Holiday Sale: Dec 23-26
- New Year's Sale: Dec 31 to Jan 2

Q&A with Adrienne Rice, Director of Media Investment at M&C Saatchi Performance

Adrienne is the Director of Media Investment at M&C Saatchi Performance. In her role, Adrienne oversees all direct partnership buys across the agency's US business. She is responsible for building vendor relationships, leading media buying strategy across key accounts, and optimizing client spend to maximize performance and revenue. Prior to M&C Saatchi Performance, Adrienne worked for several agencies in the US and Australia within digital media planning and buying. A Southern-California native, Adrienne currently resides in Los Angeles with her husband and mini-goldendoodle.

The holidays are notoriously competitive for advertisers. How do you ensure you're spending where it counts, and identifying when a channel is saturated?

Prices will go up during the holiday season because there is so much competition, but pay attention to your CTRs and conversion rates. When those start to decline, you are reaching channel saturation. It's also key to perform audience research. Use surveys and data from prior years to determine who your target audience is, then design your strategy around them. Finally, determine which channels will be most effective at reaching your target audience and fulfilling your KPI goals. It's best to use experiential data from previous marketing campaigns to influence your direction.

How do digital advertising strategies differ between general retailers (e.g., Amazon Shopping) and direct-to-consumer brands?

General retailers sell everything, so audiences are broad. Creatives for these brands should focus on why consumers should purchase from this retailer (ease, speed of shipping, low cost).

For DTC brands, you should be more intentional, especially if you only sell one thing or one category. Your creatives should be focused on your brand. You should also reach consumers higher in the funnel to build familiarity and trust.

What channels should performance marketers use to reach mobile consumers this season?

You have to reach consumers where they are and cut through the clutter, which can be challenging during peak shopping periods. In-app rewarded ads are low-funnel and cost-efficient, which makes them an ideal way to reach customers this holiday season. We are also seeing more of our clients test with influencers, which works well when you leverage those assets using paid media.

How can marketers maximize ad spend efficiency in the post-ATT era?

Test lots of new partners and channels to find what works in this new framework. Partners that performed well when ATT first launched may no longer be top-performers and vice versa. You need to rediscover what will work on iOS and leverage non-ATT channels (Apple Search Ads, Android, CTV, etc.) as much as possible.

Some brands run campaigns across multiple product lines or subsidiary brands at the same time, especially during the holidays. Is it possible to avoid competing against yourself?

If the subsidiary brands have the same or similar audience, you can't avoid competing against yourself. However, you can segment your audiences differently so that each subsidiary is reaching different users (although this could lead to even higher costs). Or, you consolidate all marketing efforts under one website or app that houses all of your brands.

Should brands leverage any specific bidding/testing/optimization strategies to ensure holiday impact?

Make sure the basics are in place: the product catalog is set up and functioning correctly, you have a plan for motivating users, and you have backup creatives ready in case of creative fatigue. Generally, we see more competition during the holidays, so to win share, bids will need to go up. Also, we see many clients increase re-engagement efforts during the holiday season. These users are low-hanging fruit because they've already shown interest in your app, so it's easier to bring them back at this key time.

Think about how you're going to motivate people to purchase. If they're a cart abandoner, how are you going to get them back? Can you offer them any additional discounts? Set up campaigns to optimize ROAS, or any early, reliable indicator that a channel will drive results.

What should brands consider in crafting their ad creative and messaging for the holiday season?

This year, and the past couple of years, you have to think about the context of the situation people are in. There's been COVID, there have been people turning to online shopping and curbside pickup. Now, the main concern is inflation. People are concerned about their budgets and being able to do all the holiday shopping that they want to do. If you can address that concern within your ads — if you have any deals or sales that can help — that's going to resonate.

Takeaways

Holiday shopping habits

- Cater to the core shoppers, moms. But also be inclusive of everyone.

- Pay attention to Gen X when advertising big bucket items.

- Highlight all the ways consumers can easily purchase your products.

- Highlight your app touchpoint to not miss out on a large amount of shoppers.

- For shopping apps, reach consumers early on to get downloaded before they've finished their holiday shopping.

Gift giving habits

- Bring out the child in everybody through your advertising.

- Put clothing and footwear at the forefront of your advertising strategy.

- Consider smartphones as an advertising channel. Learn more about ironSource Aura.
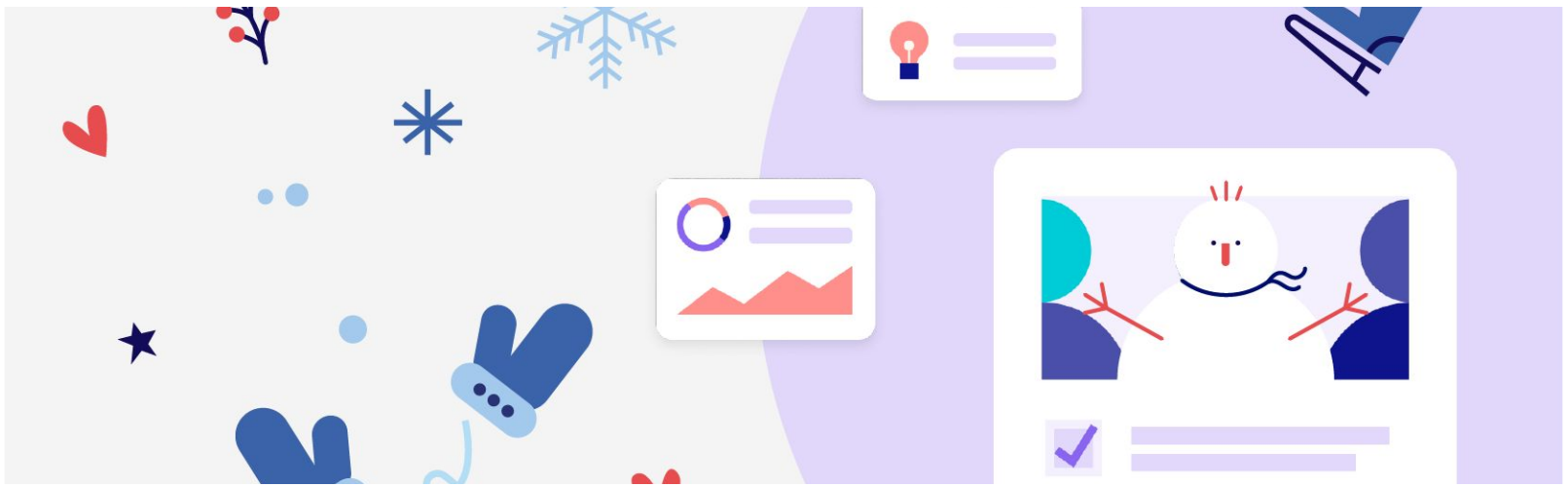
Mobile advertising

- Utilize rewarded ad units to ensure consumers are open to seeing your key messages.

Black Friday and Cyber Monday

- Consider offering similar big sales to Black Friday and Cyber Monday throughout the year at critical times.

Mobile gaming

- Advertise on mobile games to reach your audience (or multiple audiences), no matter who they are. Learn more about ironSource.

MobileVoice® methodology

For the consumer insights section

MobileVoice® Market Research Survey data was collected and analyzed using MobileVoice® custom-built surveys	**21,351 respondents** The study's respondents completed a MobileVoice® rewarded survey found in a variety of apps.	**Opt-in participation** Respondents reviewed instructional information and opted in to participate in exchange for in-app rewards.
Virtual rewards In exchange for participation, respondents received virtual rewards or premium content native to each app's economy.	**Survey period** Responses were collected and analyzed from multiple surveys launched in Q3 2022.	**Age verification** All respondents were asked to confirm that they are 18 years of age or older.

What is MobileVoice®?

ironSource's MobileVoice® market research solution has revolutionized consumer intelligence by giving mobile users a voice within the apps and games they love. It's the driving force behind the long-standing Modern Mobile Gamer® series, which recently expanded with two new Modern Mobile Consumer editions. Now, we're back for the second year in a row with a special holiday edition.

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About ironSource

ironSource is a leading business platform for the App Economy. App developers use ironSource's platform to turn their apps into successful, scalable businesses, leveraging a comprehensive set of software solutions which help them grow and engage users, monetize content, and analyze and optimize business performance to drive more overall growth. The ironSource platform also empowers telecom operators to create a richer device experience, incorporating relevant app and service recommendations to engage users throughout the lifecycle of the device. By providing a comprehensive business platform for the core constituents of the App Economy, ironSource allows customers to focus on what they do best, creating great apps and user experiences, while enabling their business expansion in the App Economy. For more information please visit www.is.com.

About M&C Saatchi Performance

M&C Saatchi Performance is a leading global performance marketing agency, delivering profitable growth for brands through full funnel performance marketing. The agency delivers world-class performance marketing services to help brands grow in the digital economy across all channels. With specialists across display, paid search, paid social, programmatic and more, our team plans and buys media, optimizing against every action the user takes at every stage of their journey. We take time to understand the brand, their objectives, and their customers to deliver improved performance and a clear return on advertising spend. With a tailored mix of tech and talent, our clients get a bespoke set of performance marketing strategies underpinned by data insights.

Founded in 2006 as a mobile digital agency, today M&C Saatchi Performance has more than 279 team members Globally, and in the US have team members across the country including; Los Angeles, Seattle, New York, Boston and San Francisco. For more information, visit mcsaatchiperformance.com and also on LinkedIn, Twitter, Instagram.