

INDUSTRY INSIGHTS: HOLIDAY PREPAREDNESS

Aug 2021



Consumers have grown accustomed to online shopping and may continue to opt for the convenience of ecommerce rather than head in-store during the busy shopping holidays. eMarketer has curated this collection of interviews with marketing executives to share strategic insights based on learnings and how they've adapted to consumers' evolving digital behavior.

MEET THE LEADERS



Jen Mullen,
Vice President and Head of Stores,
Banana Republic

Mullen is an experienced retail executive with a background in creative services, digital, visual merchandising, social media, and executive field roles. She is known for building high-performing teams committed to excellence. Mullen has a proven track record of creating holistic strategic models for successful brands around the world. [Page 5](#)



Isis Ruiz,
Senior Vice President and CMO,
Norwegian Cruise Line

Ruiz is responsible for driving demand and growing market share across the brand's key global source markets. In her role, she leads the brand's international and domestic marketing teams and drives the branding, consumer advertising, and promotional strategy for the business.

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Jeannine D'Addario,
Senior Vice President, Chief
Marketing and Communications
Officer, Guitar Center

D'Addario is responsible for the organization's marketing, branding, communications, and customer experience. D'Addario honed her marketing skills as the Interim CMO for Applebee's, CMO for Whole Foods Markets, and CMO for Stanford Medicine. [Page 7](#)



Adam Grossman,
CMO, Boston Red Sox and Fenway
Sports Management

Grossman leads marketing and communications efforts for the Boston Red Sox and its historic home, Fenway Park. He oversees the club's marketing, media relations, corporate communications, social media, advertising and content, and creative service departments. Grossman plays a vital role in developing strategies that drive revenue for the club and all non-baseball events and activities at Fenway Park.

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OVERVIEW

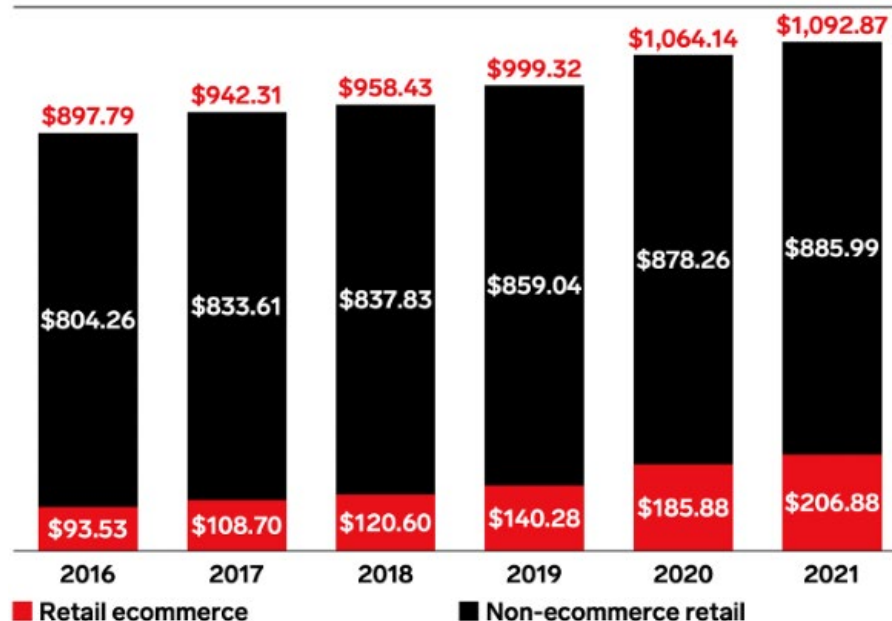
In June, Walmart, Target, and Best Buy were among the growing list of retailers that announced Thanksgiving Day store closures this year as consumers increasingly adopt ecommerce, per Insider. This mirrors decisions from last year, when stores closed in part as a safety precaution to limit in-person shopping during the winter COVID-19 surge.

The holiday closures will likely push more consumers online for Thanksgiving and Black Friday, setting the tone for future seasons. With stores being closed, consumers who would've normally gone shopping after Thanksgiving Day dinner will likely turn to online shopping to avoid missing out on promotions—making ecommerce a greater focal point than before the pandemic. In 2019, Thanksgiving Day ecommerce sales reached \$4.13 billion, but this year, that figure is expected to hit a whopping \$6.21 billion, per eMarketer forecasts.

The same trend will likely hold true for Black Friday—though to a lesser extent since more stores are expected to be open that day. Consumers may have grown accustomed to online shopping in the last year and might opt for the ecommerce route, and others may just want the convenience of avoiding the long lines that are typical for the busy shopping holidays. But kicking off Thanksgiving weekend with online shopping might set the stage for more ecommerce through the rest of the holiday season.

Thanksgiving Day ecommerce sales are expected to hit a whopping \$6.21 billion this year, per our forecasts.

US Retail & Ecommerce Holiday Season Sales billions



Note: Sales are for Nov. and Dec. of each year; excludes travel and event tickets, payments (such as bill pay, taxes, or money transfers), food services and drinking place sales, gambling and other vice good sales; includes products or services ordered using the internet, regardless of the method of payment or fulfillment. eMarketer benchmarks its retail sales and retail ecommerce sales figures against US Department of Commerce data, for which the last full year measured was 2017.

Source: eMarketer, February 2021

Methodology: Estimates are based on the analysis of data from benchmark source US Department of Commerce, estimates from other research firms, historical trends, reported and estimated revenues from major online retailers, consumer online buying trends, and macro-level economic conditions.

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For the broader holiday season, other pandemic trends are looking sticky:

- **Ecommerce will continue to match the value that customers get in-store—boosting its share of overall sales.** Beyond Thanksgiving, more consumers will likely turn to online shopping throughout the entire holiday season, especially after retailers proved over the last year that they can duplicate much of the in-store experiences digitally by offering the same discounts online and in-store and through same-day pickup. So even with the ability to shop in-store this year, ecommerce will continue to grow. Retail ecommerce sales are projected to make up 18.9% of total holiday retail sales, up from 17.5% last year, per our forecasts.
- **The digital push will likely set off an earlier holiday season again.** Because the pandemic greatly inhibited in-store shopping last holiday season, retailers were quick to introduce online promotions earlier in the year to maximize holiday sales. Postponing Prime Day to October last year—which led other retailers to introduce coinciding promotional events—also helped stretch the traditional holiday period, which normally begins in late November or early December. With retailers again placing greater emphasis on ecommerce, it's likely we could see a similar holiday head start this year—especially with rumors floating that Amazon is considering running a second sales event in the fall. Earlier holiday season sales should also help avoid fulfillment crunches late in the holiday season.

Retail ecommerce sales are projected to make up 18.9% of total holiday retail sales, up from 17.5% last year, per our forecasts.

BANANA REPUBLIC'S JEN MULLEN, VP AND HEAD OF STORES

April 23, 2021



Following a diminished need to refresh their wardrobes, Banana Republic consumers are excited to celebrate the holiday season in style. When we caught up with Mullen, she shared how the fashion retailer is amplifying its cross-channel strategy and what was learned last year to ensure a seamless holiday shopping experience.

A buyer behavior that changed last year was buying so much more online. Ecommerce grew by about 33% last holiday season. How did Banana Republic pivot its marketing to digital channels?

We focused a lot on celebrating online. We certainly had a decrease in traffic into stores, but we saw consumers shopping across channels. She was looking for the things that she needed online and then coming in the store to either pick up or shop. We did shift significantly to online and made sure that our inventory online was what she was looking for, not only cross-gender but also cross-brand with the other brands in our portfolio. We were trying to make sure that we could get every person in their family in just one shopping trip onto the online space.

How will you take those learnings and apply them to this holiday season?

I think the biggest thing for us is the resurgence of stores and utilizing online services to get the customer back into brick and mortar and figuring out how those two can play together in the holiday space this year.

One major difference between the 2020 holiday season and this year's holiday season is the length of time between Thanksgiving and Christmas. Last year, it was a five-week period. This year, there are only four weeks. When will Banana Republic start to promote the holiday season?

We have a big kickoff in November, and we do a big in-store and online kickoff at the beginning of the month. Usually, on about November 4 or 5, you'll start to see the holiday season really come to life in-store and online. However, it's that week of Thanksgiving and Black Friday where you're going to see sales follow. You're going to see some of the excitement and promotional activity that we love around the holiday season start.

What we find is that even in a five-week lapse between Thanksgiving and Christmas, or even in the four weeks, we tend to do the same volume. It just gets shifted into different weekends and into different peak days. It gets consolidated a little bit, but we still get the same excitement, and a little bit more urgency, when customers realize that there's a condensed shopping time between holidays.

***"Usually, on about November 4 or 5, you'll start to see the holiday season really come to life in-store and online!"
—Jen Mullen, Banana Republic***

What time do you think is too early to start promoting holiday? And when do you think it's too late?

There has to be a fine balance. I think this year is going to be a little bit different. It's an opportunity for all retailers to reset their promotional strategy and really look at what the peak days are during the holiday season. Are there moments where you don't have to promote? Are there moments where you can create a frenzy around a weekend activity that might be different than just running a consistent promotion for most of the holiday?

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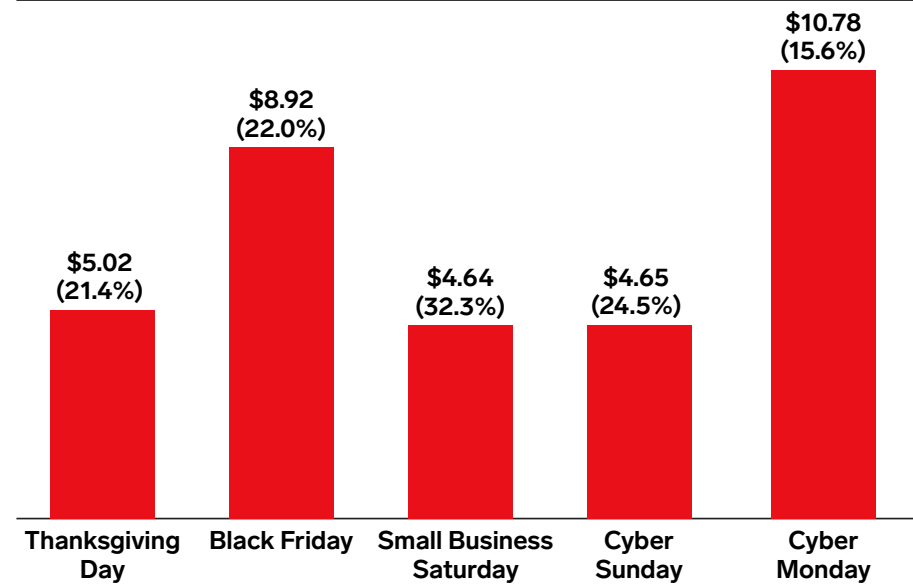
The most important times will continue to be around Black Friday and the two weekends up to Christmas. However, I think there are going to be more one-day deals out there. There's going to be more excitement and promotion around weekend activities to get people back into shopping centers.

**Want to learn more about how
Banana Republic incorporates digital
in its brick-and-mortar stores?**

[Watch our video interview](#)

US Cyber Five Retail Ecommerce Holiday Season Sales, by Shopping Day, 2020

billions and % change vs. prior year



Note: excludes travel and event tickets, payments (such as bill pay, taxes or money transfers), food services and drinking place sales, gambling and other vice good sales; includes products or services ordered using the internet, regardless of the method of payment or fulfillment

Source: eMarketer, Feb 2021

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GUITAR CENTER'S JEANNINE D'ADDARIO, SVP AND CMO

May 19, 2021



This holiday season, music store Guitar Center plans to foster community and support across its channels to offer more than just instruments and meet market demands. We spoke with D'Addario about the importance Guitar Center places on encouraging new and existing consumers by providing educational tools like online lessons and platforms that integrate user-generated content to further support musical expression and composition.

Guitar Center seems to have learned a ton from 2020. What are some of those learnings that you think can apply to this upcoming holiday season?

The holiday season is always an important one for us. It's the biggest time of the year—music is a great gift. We see a lot of people come into the stores during that time period and a lot of new customers who are buying for others. Some of the things that we'll be doing this year—things that we learned through the pandemic—will be making sure that we're offering people who come in to buy an instrument for the first time, whether it's for them or for somebody else, more than just the instrument.

Music composition is at the forefront of Guitar Center's marketing, and last year's holiday campaign, Make Music, was fronted by Grammy-winning R&B singer H.E.R. and included 24 other artists. The campaign encouraged consumers to upload their own user-generated content videos using the hashtag #whywemakemusic. What social channels is Guitar Center testing to connect with musicians and future music makers?

We have a very robust social presence across both Facebook, Instagram, and Twitter. An area that we've just started to really explore is TikTok. We're also doing Pitch. There are a few others that are very specific to the music-playing audience. We encourage customers to share their content with us across our channels.

We're constantly having great dialogue with the customer in whatever social channel they frequent, where we talk about products, where we talk about inspiration, and share stories, because being in that musical journey is not just playing that instrument in the moment. It's all of the components. It's sharing your music. It's talking about it. It's getting insights and information from other people in the community. And one of the things we've learned through that is that we want to build a community for our learners, our music lessons takers, so that they can talk to each other and give tips and support, and talk about challenges that they face and how they overcome them, so that they can help each other in the learning journey.

When can we expect to see communications from Guitar Center about what's in store for this holiday season?

We're super excited about everything that we've got in store. Lots that we're going to surprise you with, so we're not going to give it all away, but I think you'll see us continue to have conversations with artists about why they make music. It's so timely and on trend right now, as we come out of COVID-19 and people continue to want to play instruments and hone their skills.

People want to hear from others as to why they make music. So, you'll see some of that this year, and some new artists coming to the forefront. We're also starting to talk about things like events, which after a year and a half of no live music, is a really exciting thing to get to talk about and think about. We'll be celebrating some artists with more in-person, one-to-one opportunities that we haven't had the opportunity to do for a while.

Want to learn more about Guitar Center's approach to acquiring new customer cohorts? [Watch our video interview](#)

PERFORMANCE TV IS THIS YEAR'S BIGGEST HOLIDAY OPPORTUNITY

This article was contributed and sponsored by **MNTN**.



Ali Haeri

**VP of Marketing
MNTN**

The National Retail Federation (NRF) revised their total consumer retail spending estimates for 2021. Originally pegging their estimate at **\$4.33 trillion and 6.5% year-over-year (YoY) growth,**

the surprise strength in 2021 consumer spending has seen them raise their estimate to between 10.5% and 13.5%.

This change has certainly elevated retailers' expectations heading into the busy Q4 holiday shopping season. With heightened expectations however, comes increased competition. Every advertiser under the sun will be looking to claim their share of that holiday spend (and it's a fair assumption that this will include as much of *your* share as they can get).

Advertisers need a refined approach. Not only to help differentiate from the competition, but also to deliver strong ad performance; especially in light of mobile ad tracking restrictions and their impact on social ads. That's why it's imperative you add connected TV (CTV) to your strategy this holiday season—specifically with a focus on direct-response performance.

Connected TV isn't a luxury—it's a necessity

TV viewership and industry trends make the case for having a strong presence on CTV. Viewers are streaming television more than ever before, and more ad inventory is coming online by the day. Every major streaming service that has debuted recently offers an ad-supported tier. Peacock, Paramount+, and Discovery+ all offer ad-supported options while HBO Max, which debuted last year with no ads, just launched an ad-supported tier.

Why? Because consumers are voting with their wallets. An [Adweek-Morning Consult poll](#) found 49% of streaming television viewers prefer a low cost ad-supported model, while just 22% prefer a costlier ad-free subscription. CTV viewers don't mind ads, which is a wonderfully unique aspect that advertisers need to lean into this holiday season.

Don't rely too heavily on social

Apple's iOS 14.5 update, which requires users to opt in to mobile ad data tracking, has made social's audience targeting and measurement notably less effective. This is a major problem for the likes of Facebook, and advertisers who rely on them.

"These changes will directly affect [advertisers'] ability to use their advertising budgets efficiently and effectively," said Dan Levy, Facebook's vice president of ads and business products. "Our studies show, without personalized ads powered by their own data, small businesses could see [a cut of over 60%](#) of website sales from ads."

This wouldn't be a problem if users opted in to ad tracking, but early results are not promising—analytics firm Flurry notes [only a 11% daily opt-in rate](#) for US mobile app users.

Move performance dollars to connected TV

Advertisers looking to avoid newfound pitfalls tied to social advertising should consider CTV—especially for performance-focused ad budgets. That's because CTV offers audience targeting and measurement that delivers the same direct-response metrics social has provided in the past.

If you're looking to drive serious campaign performance with CTV, check out the [2021 MNTN Performance TV Holiday Guide](#). It's full of best practices and insights that transform your holiday ad strategy into a conversion-driving, revenue generating machine.



MNTN PERFORMANCE TV

'Tis the season to drive serious performance on Connected TV.

More of your customers are streaming TV now than ever before—so what's your plan to make the most of it?

The MNTN Performance TV Holiday Guide covers best practices, stats, and insights that will transform your Q4 ad strategy into a conversion-driving, revenue-generating machine. Don't miss your chance at a breakout holiday season—check out the guide and join the thousands of advertisers already driving serious performance on Connected TV.

[See the Guide](#)

NORWEGIAN CRUISE LINE'S ISIS RUIZ, SVP AND CMO

June 25, 2021



During its 16 months in port, Norwegian Cruise Line took a bold approach to its lockdown messaging by acknowledging consumers' desire to "break free" from pandemic-related restrictions with a holiday campaign that tapped into a commonality. When we spoke with Ruiz, she explained how the cruise line will maintain its marketing momentum as the holiday travel season approaches and families look to set sail and reconnect.

Last holiday season cruise ships were docked, but Norwegian chose to launch the "Break Free" campaign. What can you tell us about the campaign's timing?

It was a bold move and one that we believed was the right thing to do. For the first time in our history, we were able to lean into a consumer sentiment that everyone could agree with. Everyone was in lockdown, ready to break free, ready to get back out there, and we wanted to acknowledge that but also take that collective sigh.

Even if it couldn't happen tomorrow or next week, people wanted to plan a vacation to look forward to. "I want to break free," with that iconic Queen song, was a hallmark of the overall campaign right around Black Friday. By then, people were ready to start thinking about what was on the other side of all of this.

You'll see us lean back into that direction for Q4 2021. We're going to time another big campaign around Black Friday. It's an important time of year. People are shopping for their families, but they're also getting together and planning vacations. We want to be top of mind during that time.

Norwegian has a lineup of strong holiday offerings, what can you tell us about this year's holiday campaign?

This year's holiday campaign is going to continue to ride the momentum but also be focused on what people want to hear during the holidays. At that point, we've all been through a lot by then even in a normal year. By the time the holidays come around, they're celebratory. People are thinking about family gatherings, whether they're taking a vacation during the holidays or using the holidays to come together to plan a future vacation.

We're talking about something to look forward to and celebrate. Reunions are really critical right now. People are seeing family members that they haven't seen for the first time in a long time. We want to capitalize on that moment and make sure that that's part of the message that comes through.

Tell us more about the campaign. What can you share with us?

We're still working on those finishing touches, so more to come on that. Watch the space. It's going to be great. We're known for sort of taking bold actions, so pay attention to what we've got planned for this year. But the launch typically coincides with a big retail and promotional period for the company around Black Friday, as we're leaning into the last few weeks of the year, getting ready for all those holiday promotions that typically happen.

This is an important time for the business—you see that come through in the consumer messaging. We do a full on blitz. We want to make sure there's as much awareness around the great product offering, the great value that can be had. It's just a great way to have a vacation and get away and break free with your family.

“[Our ‘Break Free’ campaign] was a bold move and one that we believed was the right thing to do. For the first time in our history, we were able to lean into a consumer sentiment that everyone could agree with.”

—Isis Ruiz, Norwegian Cruise Line

And are there any new channels you'll be testing for this campaign?

Last year, for the first time, we experimented by paying attention to the shift in consumer behavior. We tested channels like online streaming. We'd never done anything on Hulu or Pandora. You're going to see those be a hallmark of 2021 moving forward. There's a lot to like about that.

Consumer behavior has shifted. People are still watching broadcast and traditional TV, but all of us had a lot of time on our hands and got comfortable streaming in ways that we hadn't done before 2020. In general, we lean into our community on social. We've got a really loyal following there. Content is a big part of a story. We focus on video and bringing that story to life through visuals. That's a big strategy we've leaned into. How do we continue to push the way we tell a story and move it more upmarket, more premium? And a lot of that work was evidenced with the launch of our new ship, Norwegian Prima.

It sounds like you're testing a lot of different channels. How will you measure success?

It's a great question, and one that keeps every marketer up at night. I can understand the need to have a good plan in place in terms of how we measure success. The benefit of 2020, in terms of the slowdown—although we were busy throughout the entire year—is that we took that time to put some rigor in place as it relates to our measurement of success, understanding ROI, and how each of the channels and overall marketing model contributed to our success.

That level of rigor had not existed for us historically. We spent a lot of time developing analytics and understanding how each of the channels in the overall plan contributes. For the first time, we have visibility into TV attribution, online streaming, and radio. We had a good sense of that at the pointy end of the funnel for direct marketing channels where you traditionally have that level of rigor and analysis. But that was a harder story to tell at the top of the funnel for some of the more mass media.

We feel really good about the level of rigor we put into place to develop this model that then allows us to determine the right places to make investments depending on our objectives. We've got alignment across the organization—which I think is really critical—around what success looks like that lets us make sure we're all marching to those same KPIs.

For us, it's about driving demand and having a real correlation between turning on the marketing machine and seeing demand pick up. We've been able to tell that story successfully..

Want to hear more about Norwegian's channel mix, including streaming?

[Watch our video interview](#)

BOSTON RED SOX'S ADAM GROSSMAN, CMO

July 8, 2021



A possible—yet uncertain—World Series win could happen right before the holiday season. For the Boston Red Sox's marketing team, this means being ready to pivot holiday messaging to go along with the enthusiasm of a championship win. When we spoke with Grossman, he shared how the team engages with baseball fans during the holidays and offseason by emphasizing community,

including at home in Fenway Park and on digital channels like Twitch.

The World Series wraps up just as the holiday season kicks into high gear. Given that no one knows how the season will end, how do you approach holiday campaign planning?

Our holiday executions are a lot more fun when our season ends with trophies and duck boats throughout Boston. We always feel like the holidays are an important time for us to thank our fans in particular for doing everything that they've done to support us and our club. Traditionally, tickets go on sale in December right before the holidays. Those years where we've been fortunate enough to win the World Series, our team is nimble enough to be able to make sure that we're capturing that celebration in all of our holiday messaging. And for those years that we're not, we have a little bit more time to plan and figure out our messaging.

How do you keep fans engaged during the offseason?

The offseason is where we normally take a short break as it relates to content. There are some things that we'll put out there, but when we start to ramp up, there's a lot of community work that we do. One of the things that we've done for the last five years is something we call the "Gift of Sox," which is like a "social Roman candle" of thanking our fans, granting wishes, and having fun with our community. For us, service is incredibly important. Our season ticket holders are the lifeblood of our business. We

put a lot of time and energy into the way we connect with them. That was huge in the pandemic. How do we make sure we stay connected to our most loyal fans, even if they can't come to Fenway Park. Last year during the postseason, we did cookie-making lessons for families. This is much more than baseball for us. It's really a large family between the players, season ticket-holders, or the ecosystem of what the club represents, we have to maintain a strong connection. Our foundation and the community work that we do all year is extraordinary.

From a digital or traditional channel perspective, what has worked best at keeping the fans engaged and for merchandise sales?

We are highly focused on digital. Our big emphasis has been on understanding and segmenting our fans to make all of our marketing and communication as personalized as possible. I'd say we have a long way to go in achieving that goal. Everyone is different, and I think what happened—especially on the digital side—is there is so much data and technology out there that we can adapt our communication and our efforts and try to proliferate them across the different tastes and spectrum of fans to make sure we're giving fans what they want, no matter their need.

"For us, service is incredibly important. Our season ticket holders are the lifeblood of our business. We put a lot of time and energy into the way we connect with them."
—Adam Grossman, Boston Red Sox

How do you promote games as holiday gifts and also cater to your esports audience?

One of the things that we've tried to do is work with MLB and be on their Twitch channel to integrate some of what [the players are] doing in their offseason or in between games. On the holiday side, we have more of a retail approach. There are specials that we run, and we have the Christmas at Fenway event. This is the first time fans can buy tickets for the following season. They get the best choice of seats and get to choose from a handful of games. That's something that we've been doing for the last 20 years. It continues to have resonance because it is in time for the holiday season. Even in a cold Boston winter, there's optimism and energy to come to Fenway for the following year, and we try to align that with the holidays.

Two channels that have seen significant growth are Connected TV (CTV) and social. How are you leveraging these channels?

It starts with great and engaging content, and then what we've tried to do is also follow that up with a lot more paid spends and making sure that we're targeting content to the fans that may be most interested. For us, we want to keep that 365 rhythm of making sure that we're on channels and people's minds throughout the year. CTV is interesting. It's amazing to see that the streaming numbers from the 2021 season are the highest they've ever been. We've seen how important CTV and the digital experience are. MLB has done an incredible job with MLB.TV, the Ballpark app, and working with the clubs to ensure that the digital and physical experiences are connected.

Want to hear more about the Red Sox's retail event space perspective? [Watch our video interview](#)

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