



Insights exchange for the model-driven economy

## Summary:

January 2025 was the coldest January in the US since 1998. The extreme cold weather and unusually wintry conditions caused distinct patterns and variations in consumer behavior before, during and well after the system blanketed much of the country. Using Carbon Arc data assets, we visualize these changes and illustrate how to track weather-related affects across the country as winter 2025/2026 sets in.

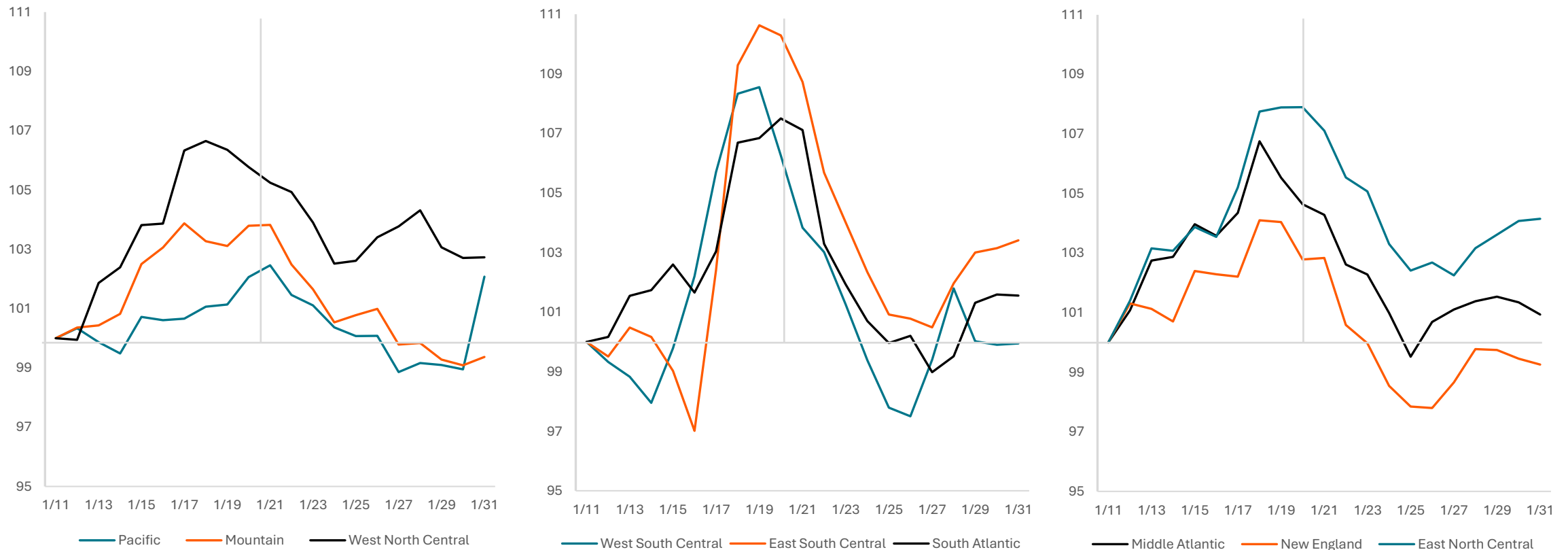
## Key Points:

1. The East & West South Central regions, which are less accustomed to severe cold or wintry conditions, showed much more pronounced changes in spending patterns as the system approached and set in.
2. Tire makers, auto repair retailers and storage facilities were all in demand prior to the system's onset, while footwear and club retail saw demand both before and after the peak of harsh weather.
3. Dairy & Eggs, Coffee and Pet Supplies were all in demand as severe weather approached, while consumers passed on re-stocking cleaning supplies and indulgent beverages in the heart of the cold.
4. As cold weather set in and foot traffic slowed, OTT streaming jumped and consumers shifted interests from romantic comedies to war, crime and thrillers.
5. As cold weather faded, many states saw Y/Y jumps in permit applications for plumbing work and repairs.

# The Extended Cold Wave of January 2025 Resulted in Similar Patterns of Consumer Behavior Across Regions, Albeit with Different Magnitudes

Across all regions, consumers accelerated spending during the onset of the polar disturbance and related wintry conditions, and pulled back as cold or wintry weather set in. The southern and central regions, which had the coldest temps or the most abnormal snow & ice conditions, had the largest variations in consumer spending.

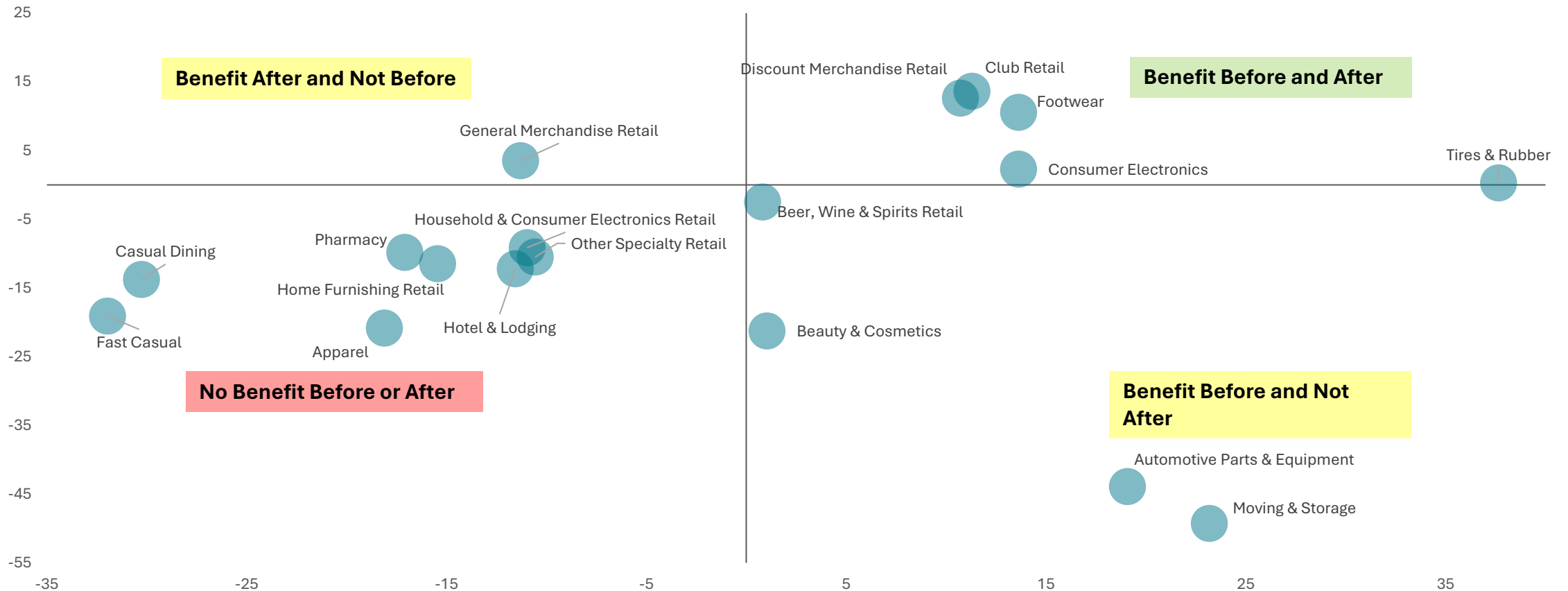
Indexed seven-day rolling credit card panel spend by region during a twenty-day window around the heart (Jan-20) of the US January 2025 cold center of the



# The Large Winter System Shifted Spend Across Consumer Categories

Consumers focused on bulk non-durables (club retail) and footwear for the duration of the winter system, while prep-time benefited tire, auto parts retailers and storage. Restaurants and travel, retail pharmacy and other retail outlets suffered throughout the period.

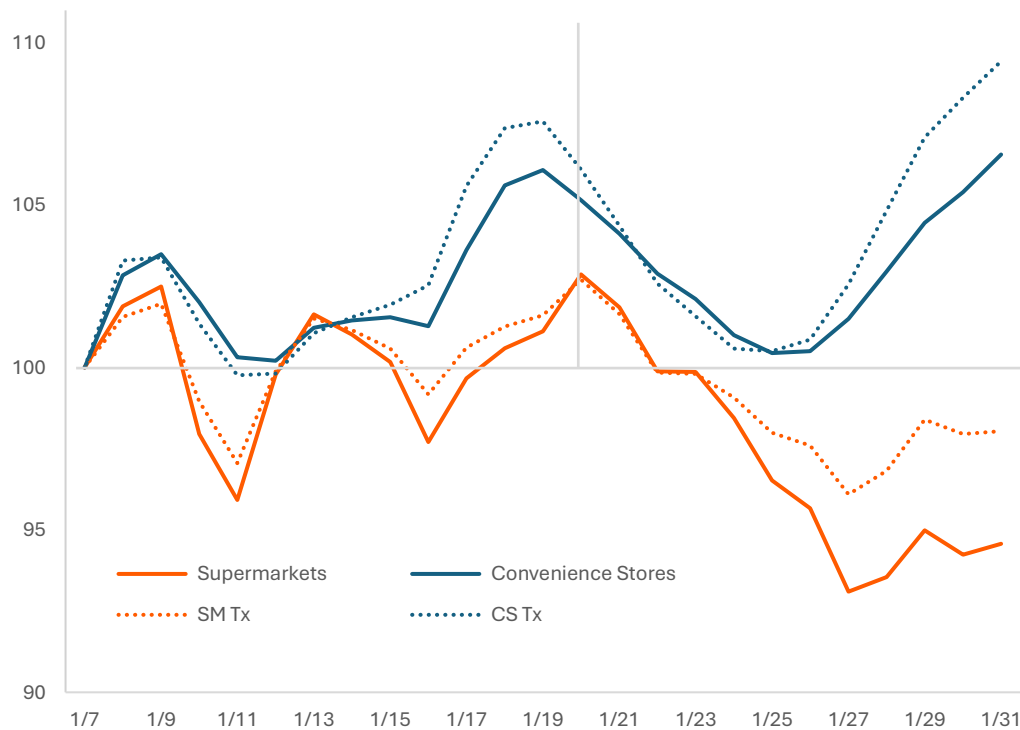
Category-specific % change in credit card spend in 2025 compared to prior two-year average for comparable 10-day windows before the most severe winter weather (x-axis) and after (y-axis) related to the polar vortex and associated wintry weather outbreak centered January 20, 2025



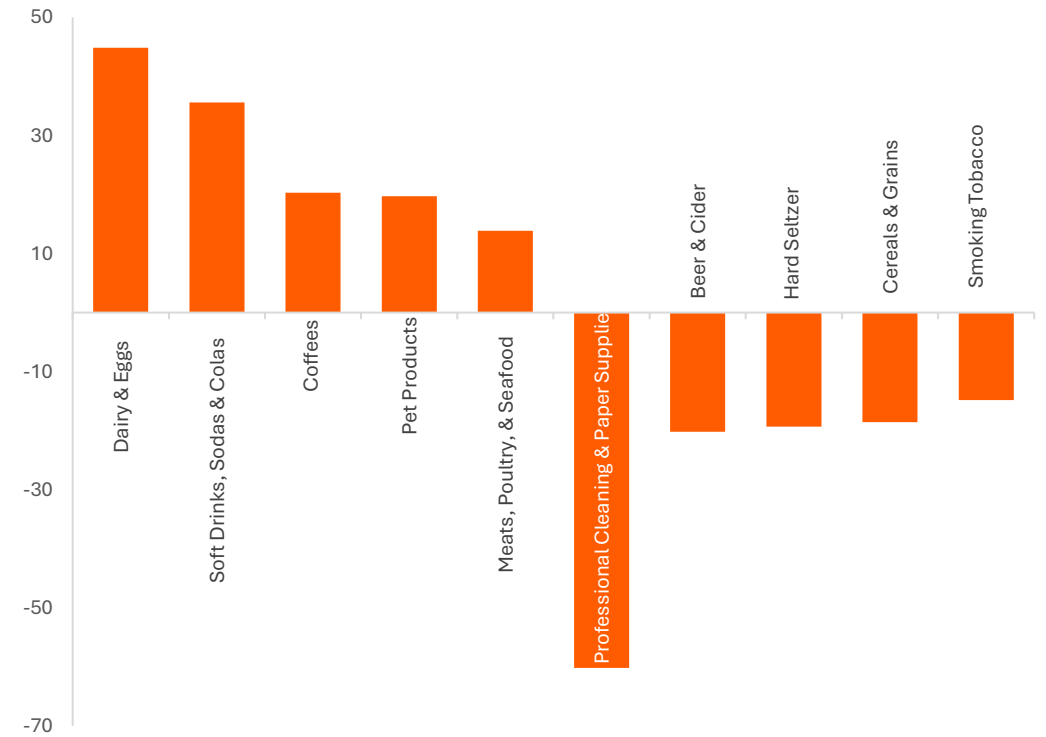
# Supermarkets & Convenience Stores, Prep Shopping and What Gets Delayed

POS spend at convenience stores and supermarkets followed similar patterns to credit card spend, with supermarkets seeing a more prolonged impact after the system's onset. With weather approaching, supermarket staples (excluding cereals & grains) had the largest increases in spend, including pet products, while cleaning products and alcoholic beverages were not priorities once the system's effects were being felt.

Indexed seven-day rolling POS spend and transactions for supermarkets and convenience stores (left) and the non-durable goods categories with the largest increases in market share spend before the heart of the system, and the largest decreases after the system's onset (right)



Sources: Carbon Arc POS – Supermarkets – CA0047, Carbon Arc POS – Convenience Stores – CA0029  
Price: 34.64 Tokens

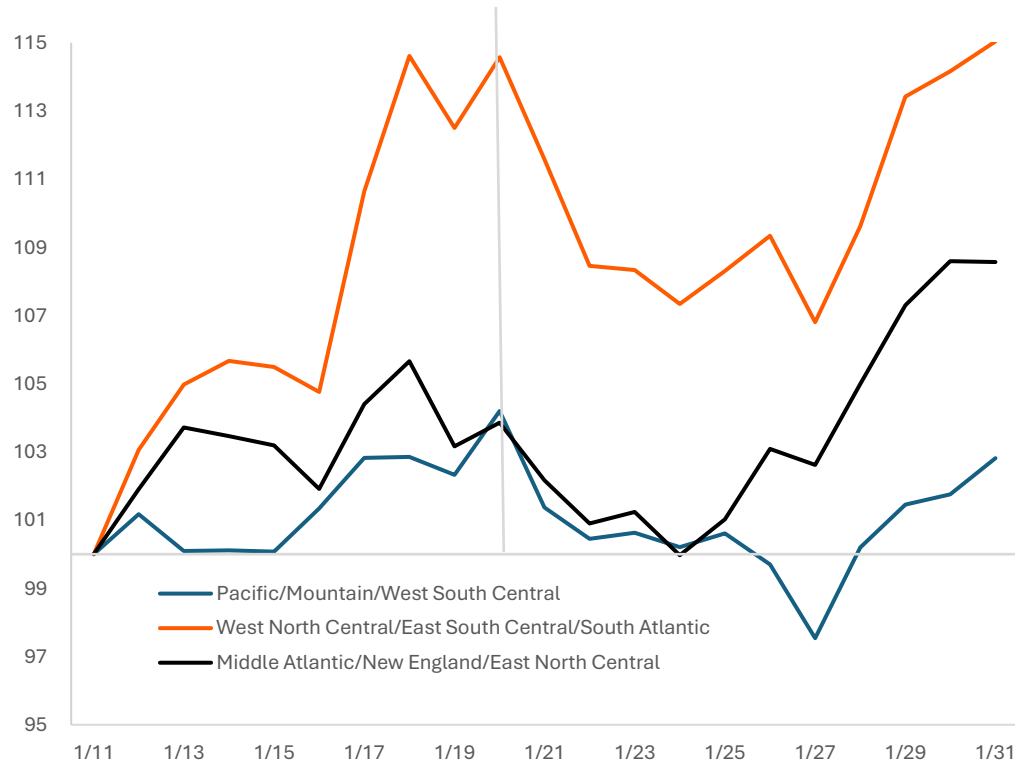


Sources: Carbon Arc POS – Supermarkets – CA0047  
Price: 86.57 Tokens

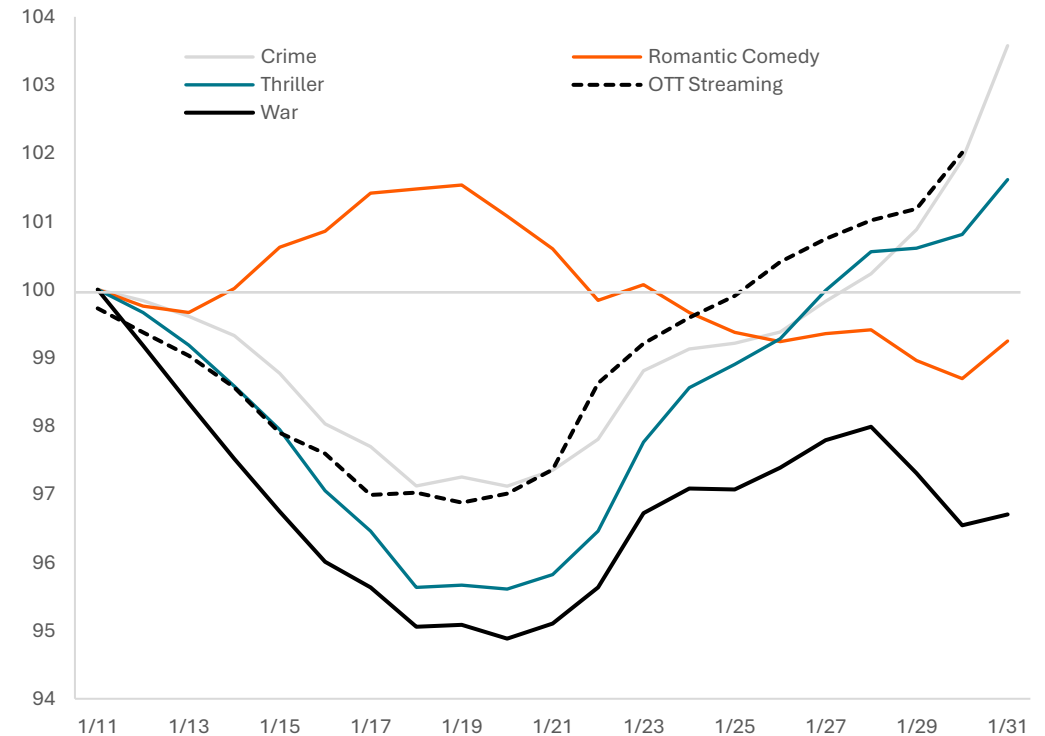
# Foot Traffic Slowed, OTT Streaming Grew, Preferences Shifted from Love to War

The patterns in spend also showed with increased foot traffic before the system's harshest period and declined for a period after, with the central and southern regions again showing the largest effects. OTT streaming showed an inverse relationship, with viewing slowing at first then accelerating as foot traffic declined. Consumers shifted interests away from romantic comedies and toward crime, thrillers and war-related titles.

Indexed seven-day rolling foot traffic segmented by census division weather impact groups (left) and OTT streaming overall and by genre, anchored around the heart of the US January 2025 cold spell.



Source: Carbon Arc Foot Traffic – CA0060  
Price: requires row-level bulk data access, available on request



Source: Carbon Arc OTT Entertainment Streaming  
Price: 4.99 Tokens

# Applications for Plumbing Permits Climbed After Temps Dropped

Every US state experienced below average temperatures in January 2025. Sharp drops in temperatures can catch homeowners off-guard, leading to a spikes in freezing pipes and ultimately costly repairs. Some of the regions with the quickest drops in temperatures saw the largest Y/Y increases in plumbing permits.

State-by-state difference between January 2025 and 10-year average January temperatures (y-axis) and the Y/Y %-point change in plumbing permit applications as a % of all permit applications in Q1 2025. Bubble size determined by number of days below freezing in January 2025.

