CONSUMER SURVEY REPORT

2023 Alcohol-iday Preview

A SINGLE DATA SOURCE. INFINITE INSIGHTS.

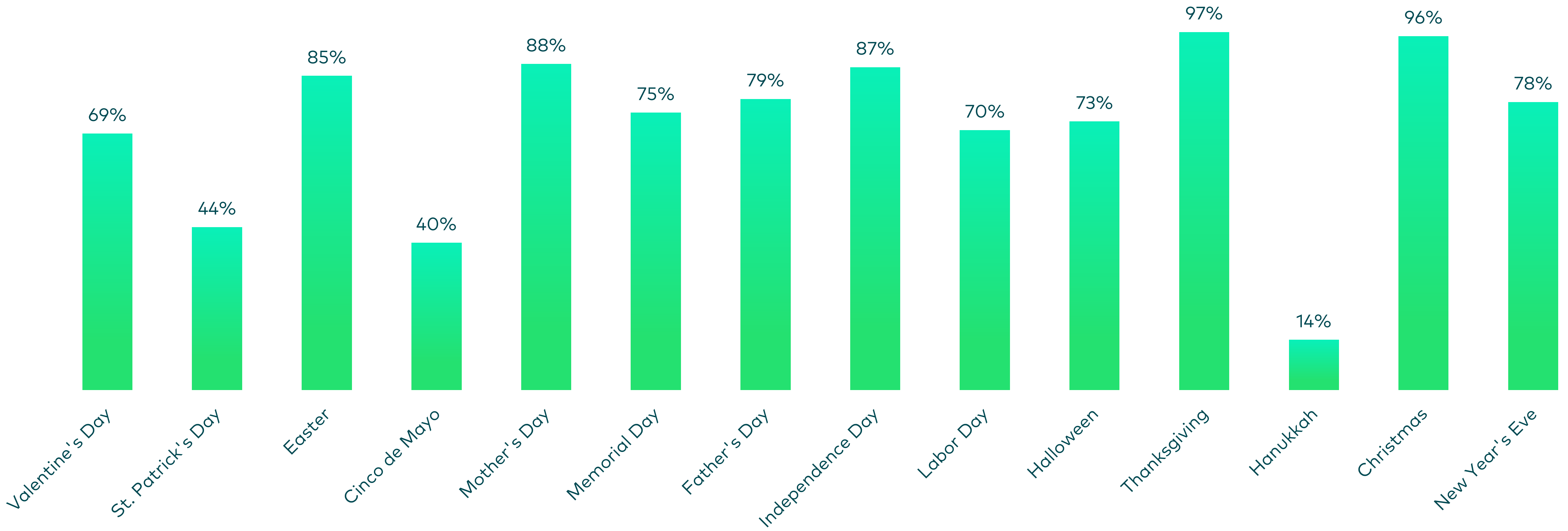
We asked 5,200 consumers about their 2023 holiday intentions – including their planned alcohol purchases.

Numerator's 2023 Holiday Preview survey was fielded to 5,263 consumers in January 2023, and highlights consumers' celebration, shopping and spending plans for 14 key holidays through the end of the year. In this report, we dive deeper into consumer intentions surrounding holiday-related Alcoholic Beverage purchases.

Setting the Stage

CELEBRATION INTENTIONS

% of US consumers planning to celebrate



Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | Do you expect to celebrate the following 2023 holidays? "*Definitely*" or "*Probably*" shown

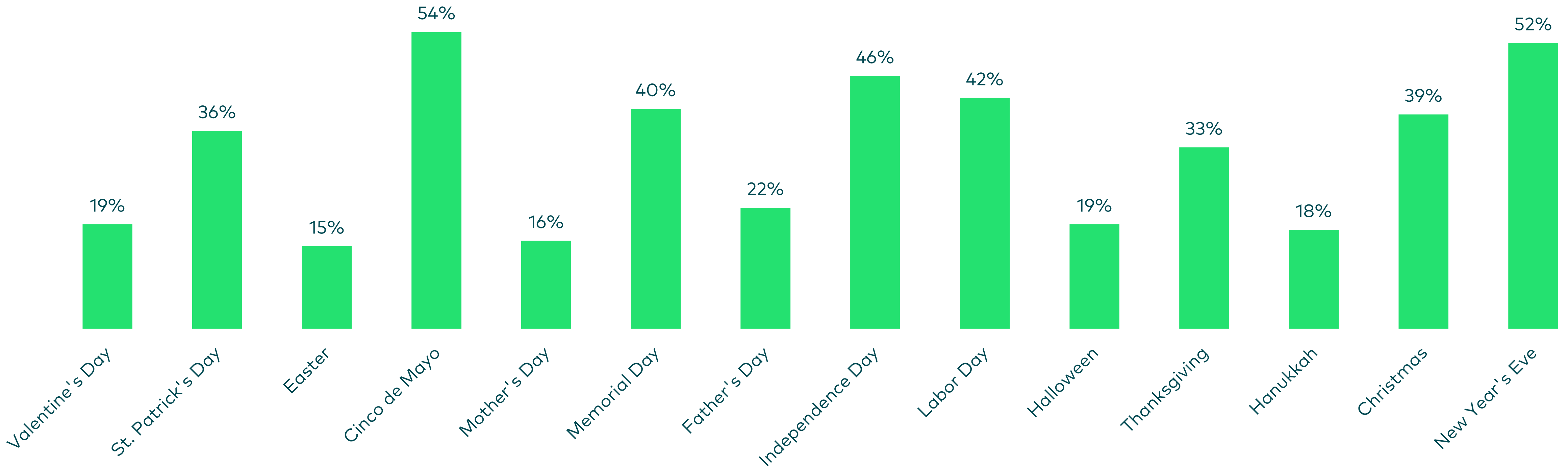
Numerator

Cinco de Mayo and New Year's Eve are top holidays for alcohol purchasing…

Cinco de Mayo and New Year's Eve are the top holidays for which celebrators plan to purchase alcohol. Traditional grilling holidays, like Independence Day and Labor Day, will also be popular for alcohol purchases.

ALCOHOL PURCHASE INTENTIONS

% of intended celebrators



Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | What items, if any, do you intend to purchase for [holiday] this year? "Alcohol"

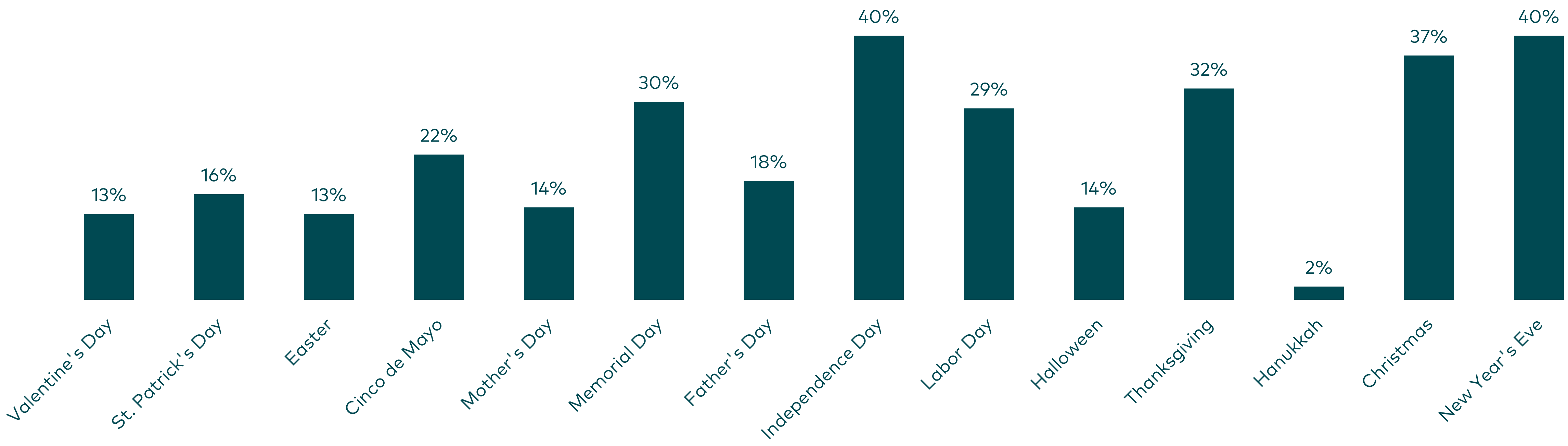
Numerator

… but New Year's Eve & Independence Day will likely see highest alcohol sales.

While Cinco de Mayo celebrators are most likely to indulge in an adult beverage, Independence Day, New Years Eve and Christmas will likely drive the highest lift in alcohol sales, since more consumers plan to celebrate those holidays overall.

ALCOHOL PURCHASE INTENTIONS

% of US households



CATEGORY HIGHLIGHT

Independence Day will likely drive the highest sales lift for **Ready-to-Drink Cocktails** and **Hard Seltzer**.

Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | What items, if any, do you intend to purchase for [holiday] this year? "Alcohol"

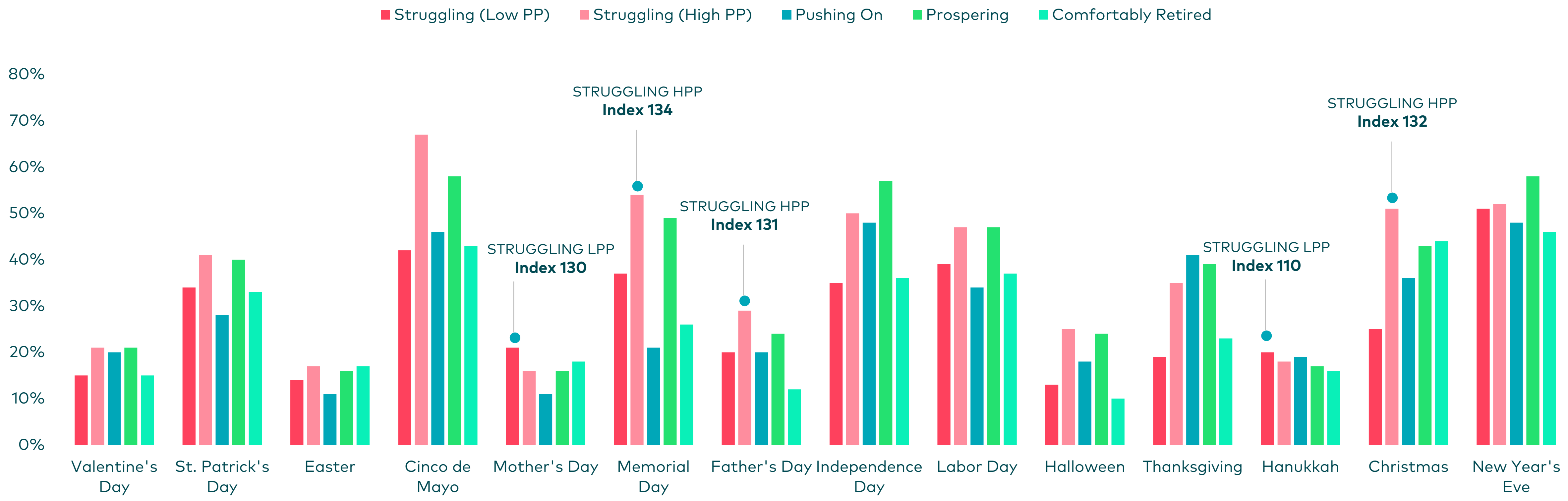
Numerator

Holiday alcohol purchases will span across consumer financial segments.

Struggling households with high purchase power are the most likely to buy alcohol for 11 out of 14 holidays, particularly for Memorial Day, Father's Day and Christmas, while Prospering households will drive alcohol sales on Independence Day & NYE.

ALCOHOL PURCHASE INTENTIONS

% of intended celebrators by 'New Realities' inflation segment *(see appendix)*



Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | What items, if any, do you intend to purchase for [holiday] this year? "Alcohol"
Learn more about Numerator's New Realities Financial Segments in the appendix

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The top types of alcohol vary between holidays.

Wine will be the preferred alcoholic beverage for holidays with more formal hosted gatherings or meals, while beer will be the top choice for summer grilling holidays and St. Patrick's Day.

TOP ALCOHOLIC BEVERAGE CATEGORIES

% of intended celebrators planning to purchase alcohol (top) | % of alcohol buyers (bottom)

19%	36%	54%	46%	39%	52%
VALENTINE'S DAY	ST. PATRICK'S DAY	CINCO DE MAYO	INDEPENDENCE DAY	CHRISTMAS	NEW YEAR'S EVE
Wine (**52%**)	Beer (**70%**)	Beer (**61%**)	Beer (**72%**)	Wine (**63%**)	Beer (**54%**)
Beer (**37%**)	Spirits (**34%**)	Traditional Cocktails (**41%**)	Wine (**39%**)	Beer (**58%**)	Wine (**50%**)
Spirits (**33%**)	Wine (**29%**)	Spirits (**37%**)	Spirits (**36%**)	Spirits (**47%**)	Champagne (**50%**)
Champagne (**29%**)	Traditional Cocktails (**21%**)	Wine (**25%**)	Hard Seltzer (**28%**)	Champagne (**29%**)	Spirits (**36%**)
Traditional Cocktails (**22%**)	Hard Seltzer (**17%**)	RTD Cocktails (**21%**)	Traditional Cocktails (**21%**)	Traditional Cocktails (**22%**)	Traditional Cocktails (**22%**)

Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | What alcoholic beverage(s) will you purchase for [holiday] this year?

Wine is the top alcohol choice for 6 out of 14 key holidays this year.

Wine holidays include Valentine's Day, Easter, Mother's Day, Thanksgiving, Hanukkah and Christmas .

Christmas will be the top holiday for wine sales.

23% of US households expect to purchase wine for Christmas celebrations, followed closely by Thanksgiving.

Older shoppers prefer wine for holiday celebrations.

Across holidays, Boomers+ are on average 24% more likely to purchase wine for their celebrations this year.

Wine is more popular in the Northeast region.

Shoppers in this region are 15% more likely to say they'll purchase wine for their holiday celebrations.

Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | What items, if any, do you intend to purchase for [holiday] this year? "Alcohol"

Beer will be the top alcohol for 8 out of 14 key holidays this year.

St. Patrick's Day, Cinco de Mayo, Memorial, Father's, Independence and Labor Days, Halloween, and NYE alcohol buyers are all most likely to select beer when shopping for holiday celebrations this year.

Independence Day will be the top holiday for beer sales.

29% of US households expect to purchase beer for their 4th of July celebrations this year.

Beer is most popular for summer holidays.

Beer is 33% more likely to be purchased for summer holidays (Memorial Day through Labor Day) vs. non-summer holidays.

Millennial shoppers are less likely to choose beer.

Instead, this generation is significantly more likely to opt for hard seltzers or ready-to-drink cocktails.

Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | What items, if any, do you intend to purchase for [holiday] this year? "Alcohol"

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In general, alcohol is not at the top of the list for 2023 holiday gift-buyers.

Among common gifting categories, alcohol is the 11th most popular item that holiday gift-buyers intend to purchase– for Father's Day, it jumps to 5th. Despite remaining lower on the list, Christmas will likely see the highest levels of alcohol gifting.

ALCOHOL GIFTING INTENTIONS

% of intended celebrators (top) | % of gift buyers (bottom)

	VALENTINE'S DAY	MOTHER'S DAY	FATHER'S DAY	HANNUKAH	CHRISTMAS
Celebrators who plan to buy gifts	44%	52%	51%	39%	78%
Gift buyers who plan to purchase alcohol	12%	7%	17%	13%	22%

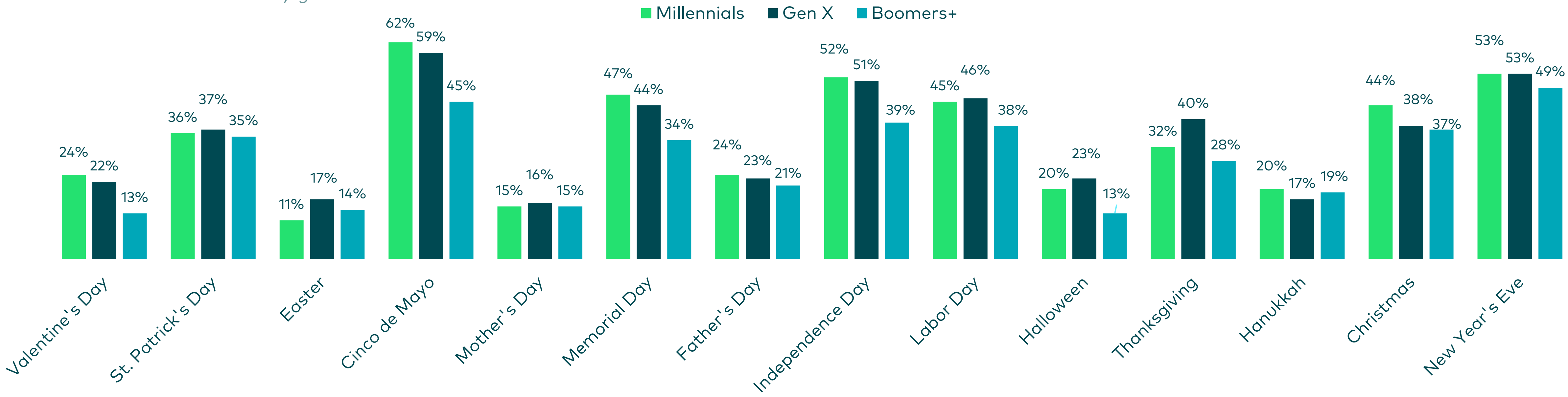
Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | What types of gifts do you expect to purchase for [holiday] this year?

Generational Spotlight

Millennials are overall more likely to buy alcohol across holidays, particularly for Cinco de Mayo (index 114) and Christmas (index 114) celebrations.

ALCOHOL PURCHASE INTENTIONS

% of intended celebrators by generation



CATEGORY HIGHLIGHT

In general, Boomers over-index on wine purchasing for holiday celebrations, but are less likely to purchase hard seltzers or ready-to-drink cocktails.

Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | What items, if any, do you intend to purchase for [holiday] this year?

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Regional Spotlight

On average, shoppers in the South are least likely to purchase alcohol across all holidays (index 90)— especially Mother's Day with an index of 68. The West was the only region to over-index for Halloween alcohol purchases.

ALCOHOL PURCHASE INTENTIONS

% intended alcohol buyers by region indexed to all buyers

North

CHRISTMAS
Index 138

EASTER
Index 131

South

ALL HOLIDAYS
Index 90

MOTHER'S DAY
Index 68

Midwest

MEMORIAL DAY
Index 119

VALENTINE'S DAY
Index 114

West

MOTHER'S DAY
Index 145

HALLOWEEN
Index 121

CATEGORY HIGHLIGHT

There are significant regional differences in alcohol preferences among Mother's Day celebrators. Celebrators in the Northeast are 45% more likely to purchase beer for the holiday, and Midwest celebrators are 60% more likely. In the South and West regions, cocktails and seltzers are preferred.

Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | What items, if any, do you intend to purchase for [holiday] this year?

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Let Numerator help with your holiday insights.

To dive deeper into the data outlined in this report, reach out to your Numerator representative or contact us at hello@numerator.com.

For full holiday insights, download our 2023 Holiday Intentions Preview.

Appendix

"New Realities" Inflation Segments

STRUGGLING + LOW PURCHASE POWER
(19%)

This group's finances are extremely tight and inflation has impacted them heavily, leading to declining financial situations. Individuals in this group have lower incomes and are highly concerned about the future & making ends meet—half of the group members are not currently employed.

STRUGGLING + HIGH PURCHASE POWER
(19%)

Finances are also tight for this group, though they have slightly higher incomes to work with than struggling low purchase power consumers. They've experienced heavy inflation impacts & declining finances over the past two years, and they are very concerned about the future.

PUSHING ON
(20%)

Neutral or comfortable with finances, this group skews a bit younger and has only experienced slight inflationary impacts. These individuals are less worried about inflation or making ends meet, and their finances have generally improved or held steady in the past two years.

PROSPERING
(31%)

This group feels comfortable with their current finances and has experienced little-to-no inflationary impact to-date. Their financial situation has generally improved over the past two years and they're more concerned with work, family and world events than they are making ends meet.

COMFORTABLY RETIRED
(11%)

Comfortable with finances, individuals in this group have an average age of 66 and none are currently employed. The vast majority say inflation has not impacted their finances, and they're not worried about it in the future. Their financial situation has stayed the same in the past two years.

PURCHASE POWER DEFINED: the most accurate picture of a consumer's buying power which takes annual income and controls for household size and regional cost of living.

Numerator New Realities Survey 7/19/22 (n=36,487) vs. New Realities V1 Survey 4/14/22 (n=10,010)
Advanced Segmentation Analysis – Focus Groups

New Realities Segment Profiles

The layered nature of advanced segmentations allows for a more nuanced understanding of these groups and how they're truly faring. Demographically, struggling high purchase power consumers look similar to prospering consumers— high income, full-time employed, suburban homeowners— but they are living two financial realities.

SEGMENT PROFILES

% of group indexed vs. all shoppers

STRUGGLING (LOW PP)	STRUGGLING (HIGH PP)	PUSHING ON	PROSPERING	COMFORTABLY RETIRED
50% Boomers+ (**150**)	**44%** Boomers+ (**133**)	**39%** Gen Z / Millennial (**140**)	**74%** Millennial / Gen X (**121**)	**74%** Age 65+ (**362**)
64% Low Income (**264**)	**64%** High Income (**137**)	**59%** Low Income (**231**)	**78%** High Income (**168**)	**55%** High Income (**117**)
33% Rural (**120**)	**42%** Suburban (**108**)	**39%** Urban (**117**)	**42%** Suburban (**109**)	**43%** Suburban (**133**)
43% Retired or Disabled (**200**)	**52%** Employed Full-time (**128**)	**16%** Student or Part-Time (**153**)	**76%** Employed Full-time (**151**)	**87%** Retired or Homemaker (**295**)
36% Rent Home (**142**)	**73%** Own Home (**111**)	**37%** Rent Home (**146**)	**73%** Own Home (**110**)	**89%** Own Home (**134**)

Numerator Insights 3M ending 7/31/22 | Numerator New Realities Survey 7/19/22 (n=36,487)

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