



CONSUMER SURVEY REPORT

2023 Holiday Intentions Preview

A SINGLE DATA SOURCE. INFINITE INSIGHTS.



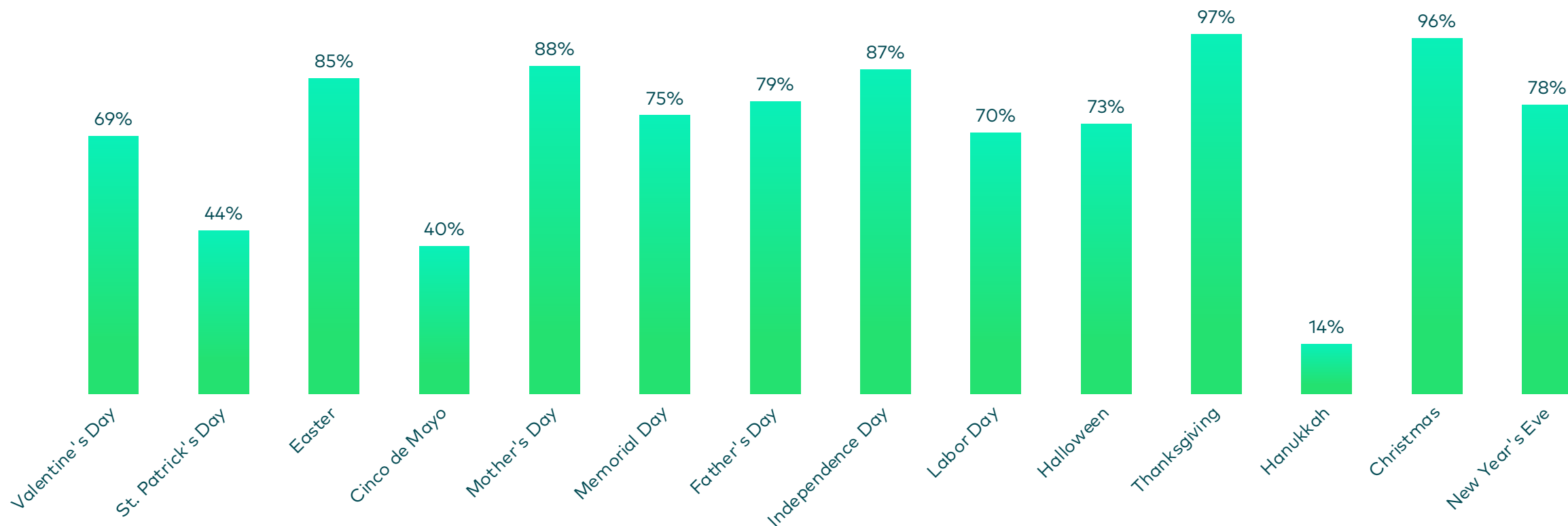
We asked 5,200 consumers about their 2023 holiday plans.

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. It also dives deeper into three upcoming holidays: Valentine's Day, St. Patrick's Day and Easter.

Setting the Stage

CELEBRATION INTENTIONS

% of US consumers planning to celebrate



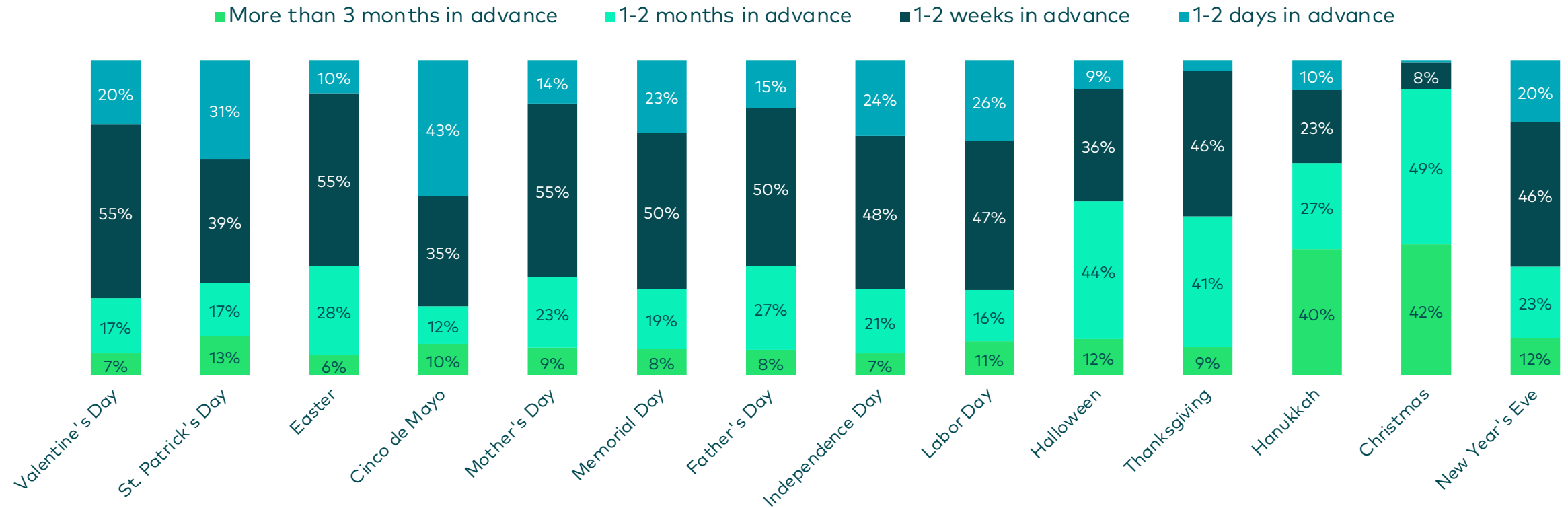
Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | Do you expect to celebrate the following 2023 holidays? "Definitely" or "Probably" shown

Most consumers make their plans within two weeks of a given holiday.

While consumer plans for Cinco de Mayo and St. Patrick's Day are the most spontaneous, holidays in the final few months of the year get advanced planning, with two-fifths of shoppers planning Hanukkah or Christmas celebrations 3+ months ahead of time.

ADVANCED PLANNING

% of intended celebrators



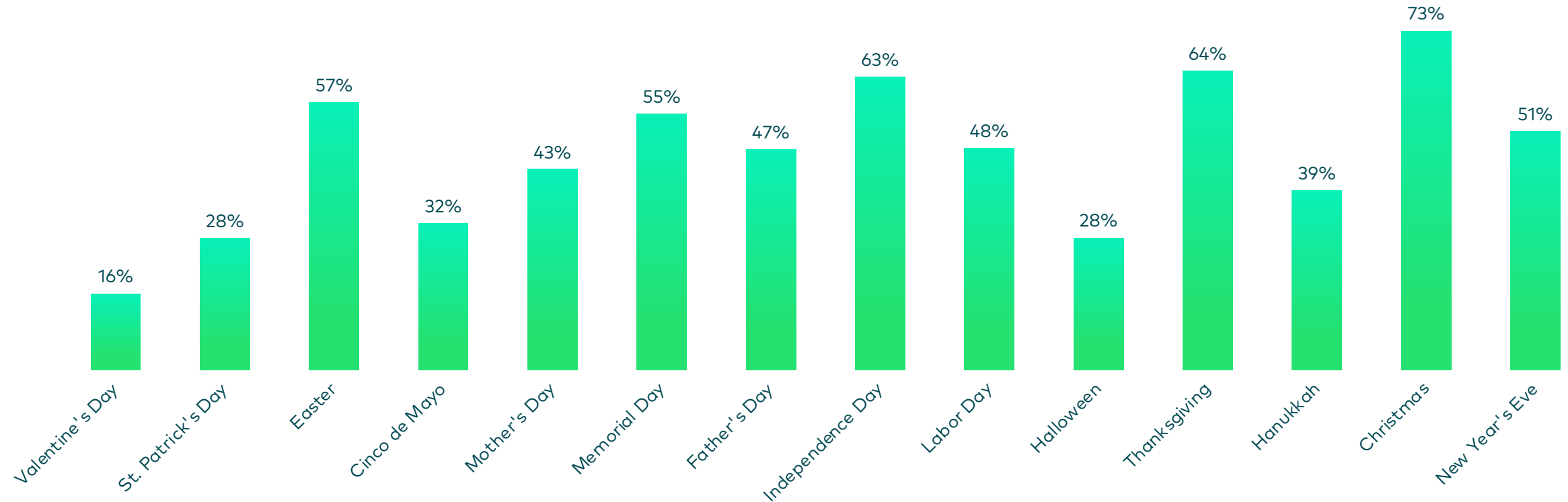
Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | How far in advance do you typically start planning/preparing for [holiday]?

Holidays are a time for consumers to gather and enjoy time with others.

Gathering with friends and family is the #1 way consumers say they'll celebrate 11 out of 14 major holidays this year. Valentine's Day, Cinco de Mayo and Halloween are the only holidays where other celebration methods take the top spot.

GATHERING WITH FRIENDS & FAMILY

% of intended celebrators



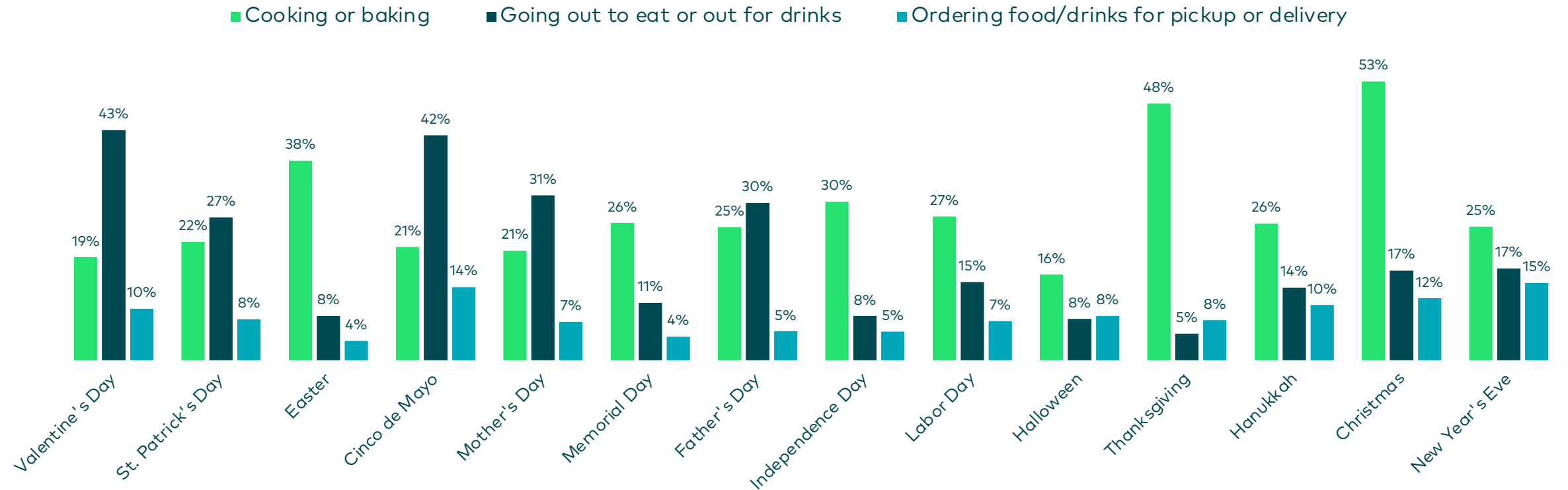
Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | How do you intend to celebrate [holiday] this year?

Food is a core component of many holiday celebrations, but prep methods vary.

While many celebrators focus on cooking at home for Easter, Thanksgiving and Christmas, going out to eat is much more popular for holidays like Valentine's Day, Cinco de Mayo and Mother's & Father's Days. Ordering in sees its peak on New Year's Eve.

HOLIDAY FOOD INTENTIONS

% of intended celebrators



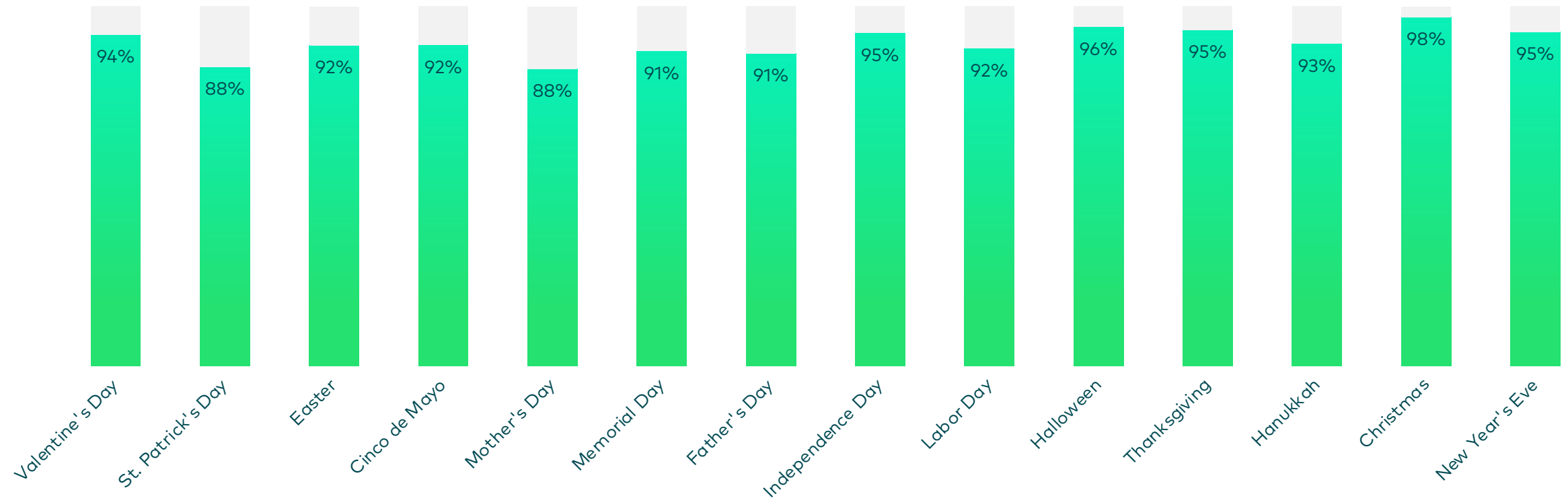
Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | How do you intend to celebrate [holiday] this year?

Nearly all consumers say they'll buy something for their holiday celebrations.

Nine-in-ten celebrators say they'll make a purchase related to a given holiday. Purchase intentions are lowest for St. Patrick's Day and Mother's Day, and highest for Christmas, Halloween, Thanksgiving and New Year's Eve.

PURCHASE INTENTIONS

% of intended celebrators who expect to buy something



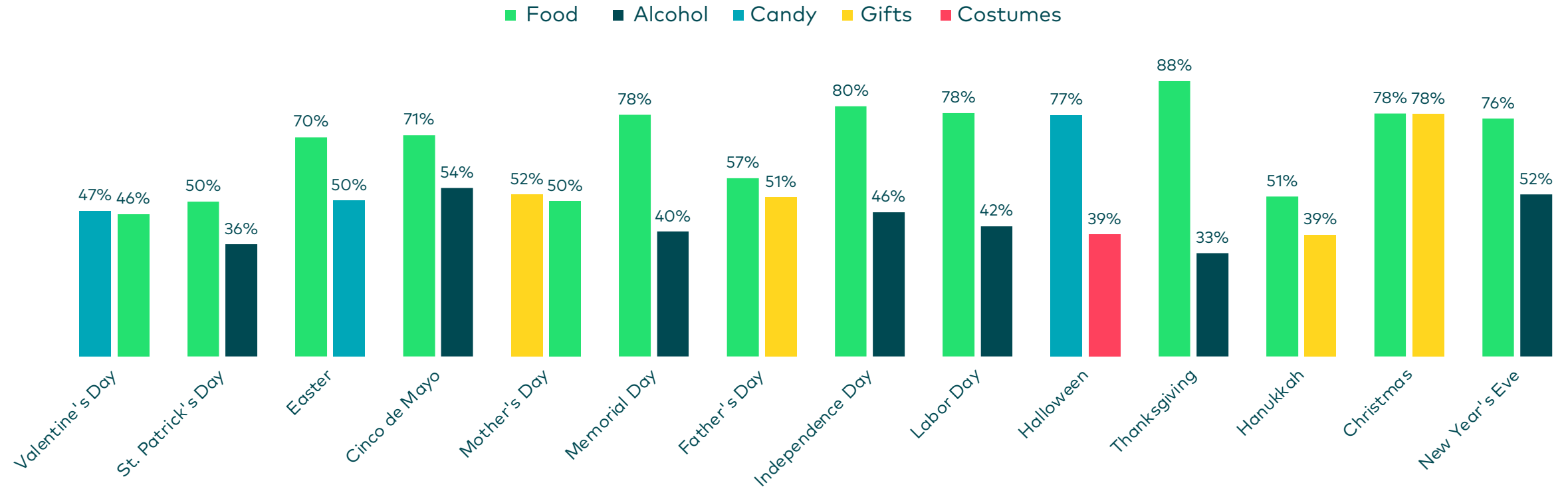
Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | What items, if any, do you expect to purchase for [Holiday] this year?

Food and alcohol are the top two items purchased across most holidays.

Food is the most popular item consumers say they'll purchase for 11 out of 14 key holidays, followed by alcohol for half of these holidays. Candy and gifts are also widely purchased, taking the top spots for Valentine's Day, Mother's Day and Halloween.

TOP ITEMS BY HOLIDAY

% of intended celebrators who expect to buy



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

The top gift categories vary between holidays.

While gift cards top the list for Father's Day, Hanukkah and Christmas, flowers & plants are the most popular gift option for both Valentine's Day and Mother's Day. Christmas is the top holiday for gifting overall, followed by Mother's and Father's Days.

GIFT GIVING

% of intended celebrators planning to buy gifts (top) | % of gift buyers (bottom)



44%

VALENTINE'S DAY

Flowers & Plants (**34%**)

Food or Beverages (**30%**)

Gift Cards (**30%**)

Jewelry (**19%**)

Apparel (**15%**)



52%

MOTHER'S DAY

Flowers & Plants (**48%**)

Gift Cards (**36%**)

Apparel (**23%**)

Spa / Beauty Products (**21%**)

Jewelry (**20%**)



51%

FATHER'S DAY

Gift Cards (**40%**)

Apparel (**36%**)

Tools / Home Imp. (**19%**)

Sporting Goods (**17%**)

Alcohol (**17%**)



39%

HANUKKAH

Gift Cards (**44%**)

Toys & Games (**42%**)

Food or Beverages (**35%**)

Apparel (**30%**)

Books (**22%**)



78%

CHRISTMAS

Gift Cards (**69%**)

Toys & Games (**49%**)

Apparel (**49%**)

Food or Beverages (**36%**)

Books (**35%**)

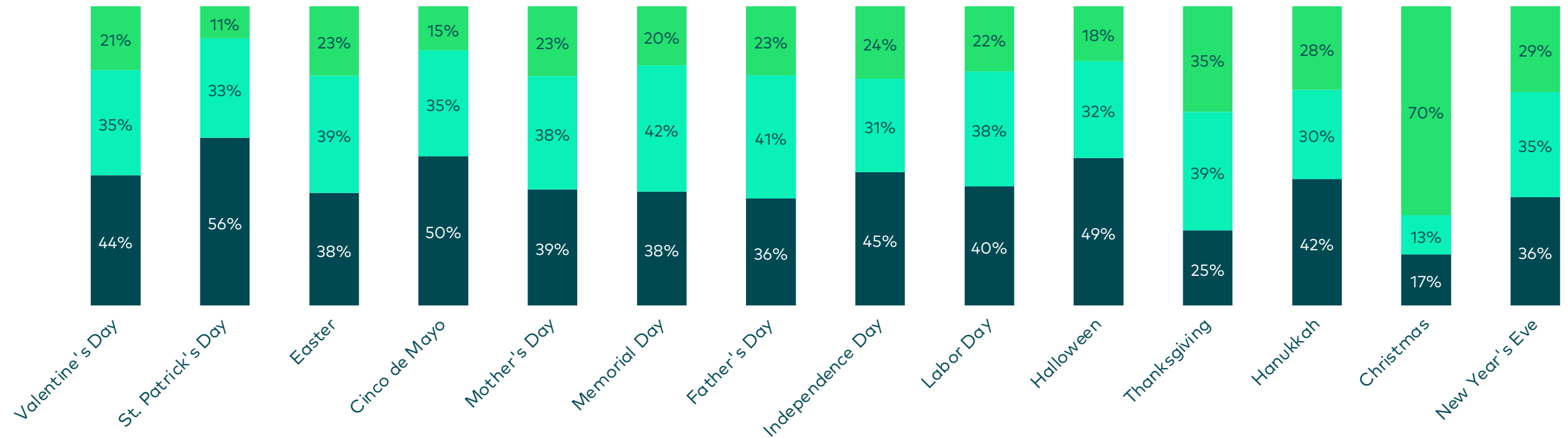
Most holiday shoppers say they'll spend over \$50 on their celebrations.

About a third of shoppers say they'll spend between \$50 and \$100 per holiday throughout the year. Thanksgiving and Christmas are the holidays with the highest expected spending, with 70% of shoppers planning to spend \$100+ on Christmas.

HOLIDAY SPENDING

% of holiday shoppers

■ Less than \$50 ■ \$50-\$100 ■ More than \$100



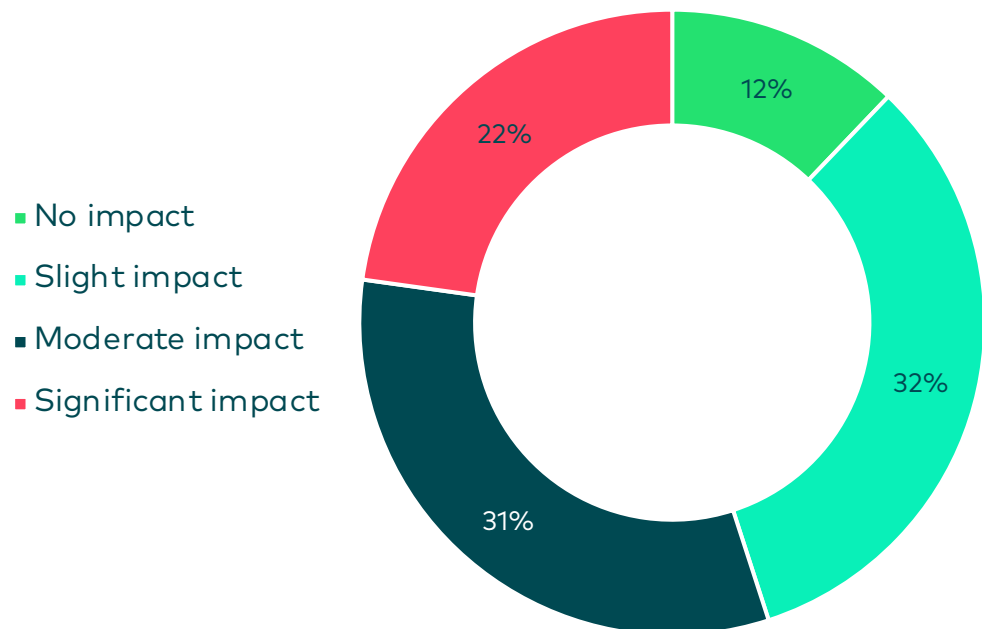
Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | How much do you expect to spend on items for [holiday]?

Consumers expect economic hardships to impact their holiday plans.

Over half of consumers expect inflation or a potential economic slowdown to impact their 2023 holiday celebrations and shopping. To save money, two-thirds of shoppers say they'll buy holiday items on sale, and half will buy fewer items overall.

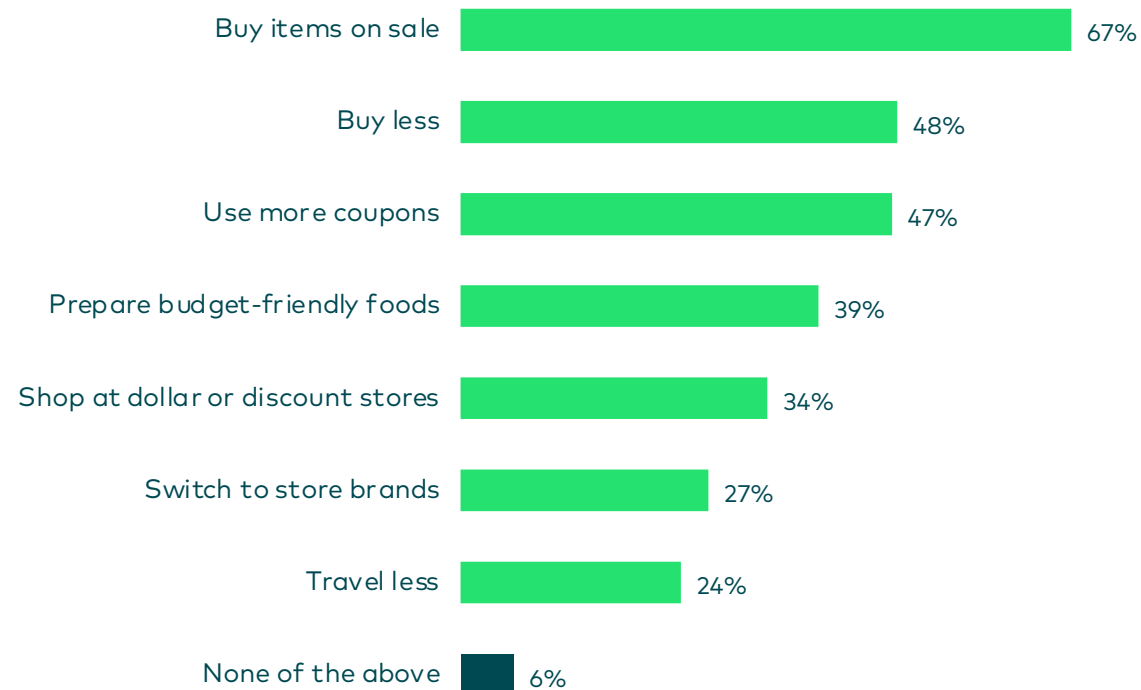
INFLATION & ECONOMIC IMPACT

% of holiday celebrators



MONEY SAVING MEASURES

% of holiday celebrators who will...



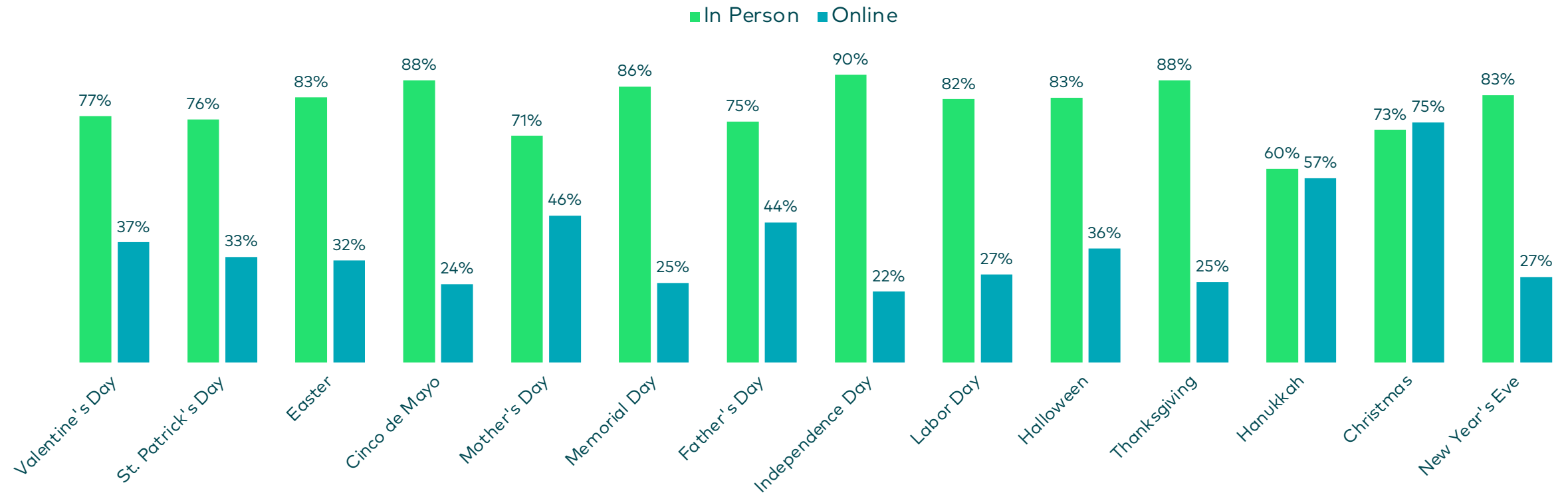
Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | To what extent, if any, do you expect inflation and/or a potential economic slowdown to impact your 2023 holiday celebrations and shopping? Which measures, if any, will you take to save money on your [holiday] celebrations and shopping?

Consumers plan to shop online more for holidays with gifts involved.

Christmas is the only holiday where the celebrators planning to shop online outnumber those planning to shop in-person, but other key gifting holidays like Mother's Day, Father's Day and Hanukkah have high expected rates of online shopping, as well.

SHOPPING METHODS

% of holiday shoppers



Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | How do you expect to shop for [Holiday]?

A closer look at Q1 holidays:



VALENTINE'S DAY



ST. PATRICK'S DAY



EASTER



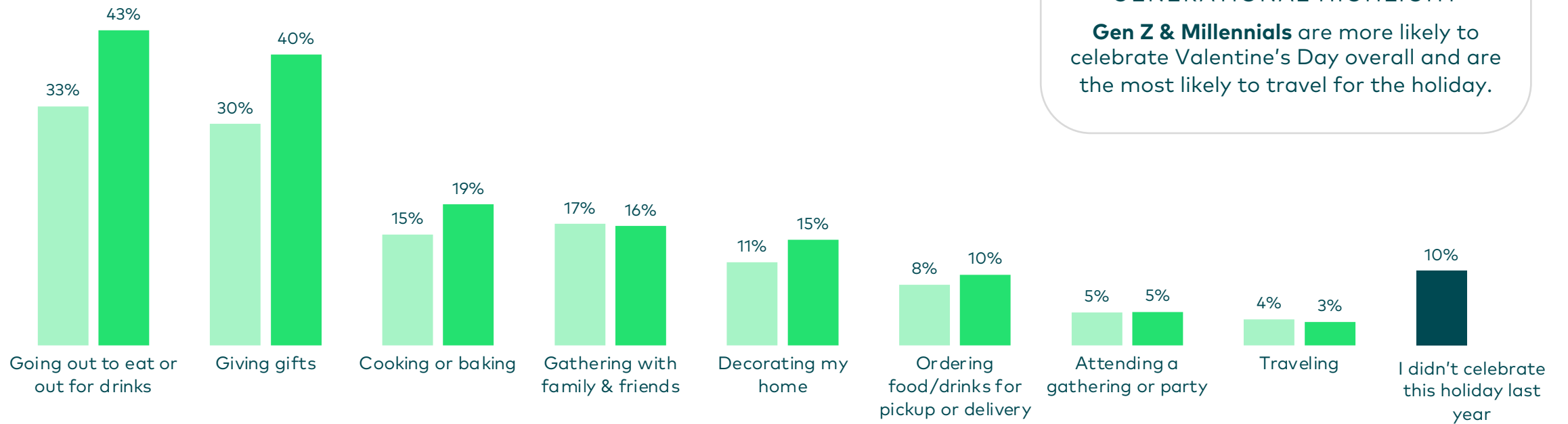
More consumers expect to dine out and give gifts this Valentine's Day.

Among the 69% of consumers who plan to celebrate Valentine's Day, going out for food or drinks and giving gifts will be the top activities, followed by cooking or baking at home. A tenth of intended celebrators this year did not celebrate last year.

CELEBRATION INTENTIONS

% of intended celebrators

■ Last Year ■ This Year



GENERATIONAL HIGHLIGHT
Gen Z & Millennials are more likely to celebrate Valentine's Day overall and are the most likely to travel for the holiday.

Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | How do you intend to celebrate [holiday] this year?

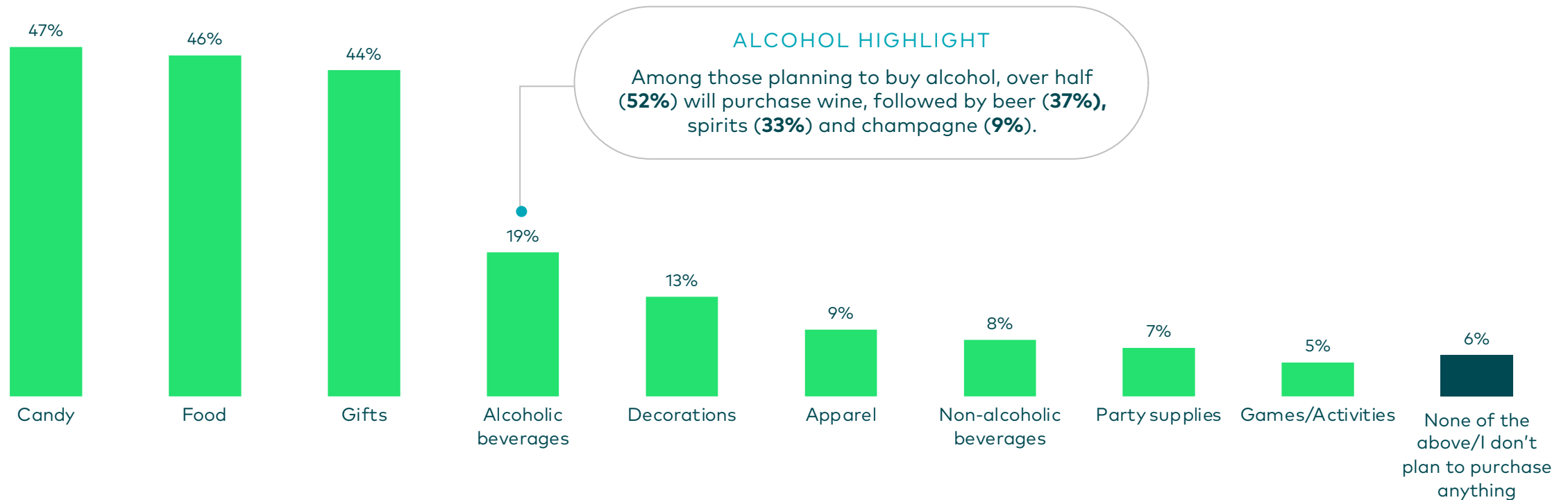


Candy, food and gifts are at the top of Valentine's Day shoppers' lists.

Nearly half of Valentine's Day shoppers expect to buy candy, food or gifts this year, and a fifth will purchase alcohol. Wine is by far the most popular alcohol for Valentine's Day shoppers.

PURCHASE INTENTIONS

% of intended celebrators



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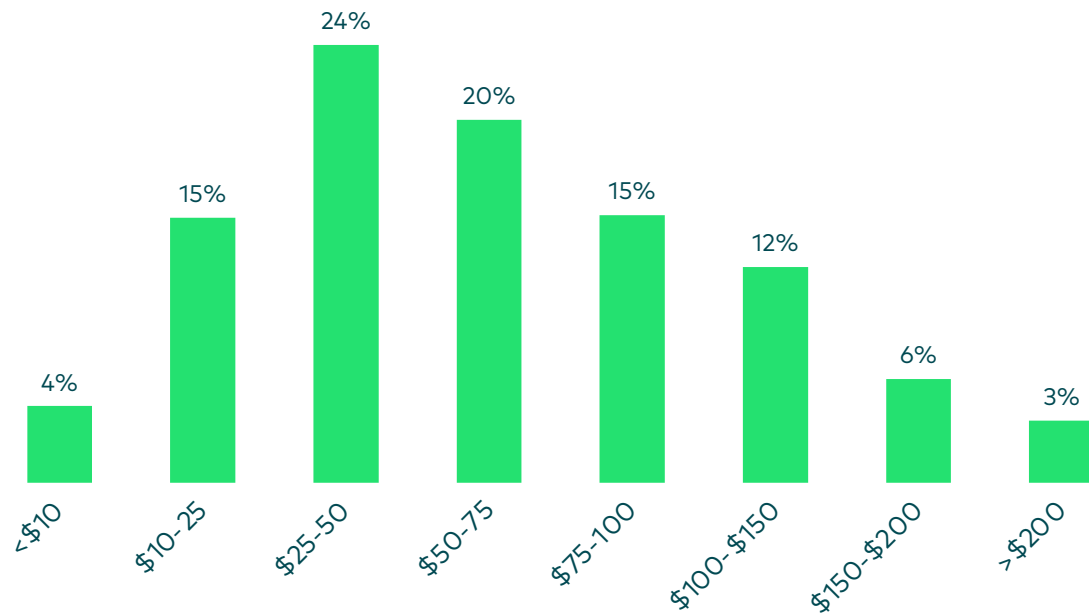
Valentine's Day shoppers expect to spend less this year compared to 2022.



Most Valentine's Day shoppers expect to spend between \$25 and \$75 on their holiday celebrations this year. Half of those who celebrated last year plan to spend the same amount this year, but nearly a third say they will spend less.

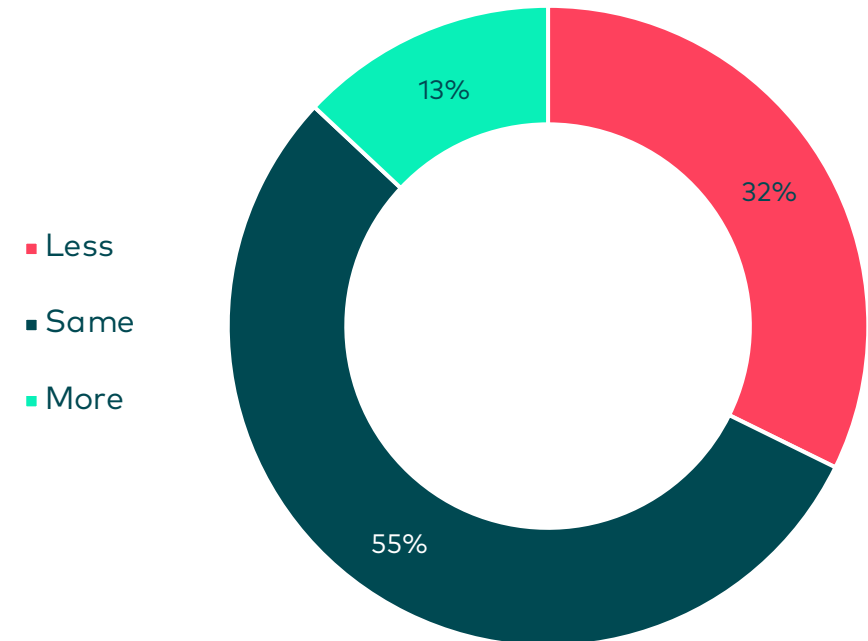
EXPECTED SPENDING

% of Valentine's Day shoppers



SPENDING VS. LAST YEAR

% of Valentine's Day shoppers



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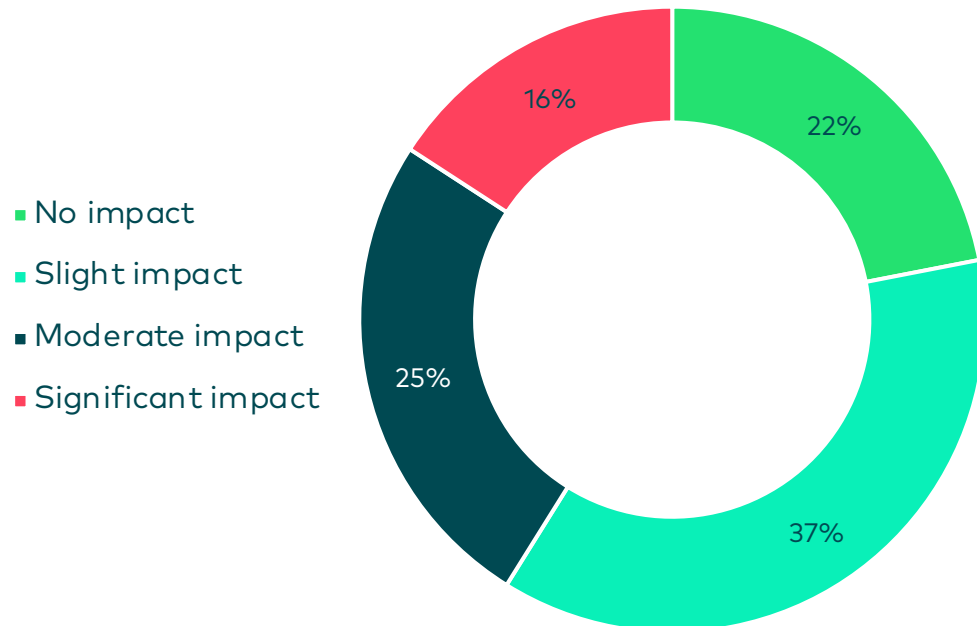
Few consumers expect economic hardships to impact their Valentine's Day.



Less than half of consumers expect inflation or a potential economic slowdown to impact their 2023 Valentine's Day celebrations and shopping. Even so, half of shoppers say they'll buy items on sale in order to save money, and a third will use more coupons.

INFLATION & ECONOMIC IMPACT

% of holiday celebrators



MONEY SAVING MEASURES

% of holiday celebrators who will...



Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | To what extent, if any, do you expect inflation and/or a potential economic slowdown to impact your [holiday] celebrations and shopping? Which measures, if any, will you take to save money on your [holiday] celebrations and shopping?

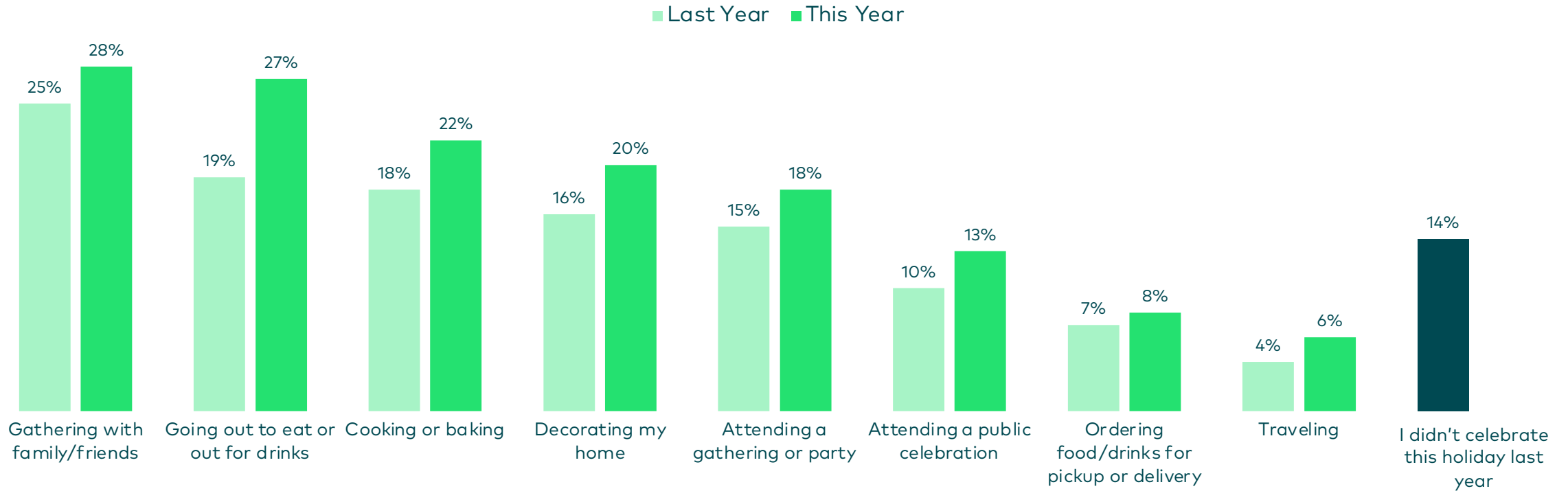


More consumers expect to gather and go out this St. Patrick's Day.

Among the 44% of consumers who plan to celebrate St. Patrick's Day, gathering with friends & family or going out for food or drinks will be the top activities. Over a tenth of intended celebrators this year did not celebrate last year.

CELEBRATION INTENTIONS

% of intended celebrators



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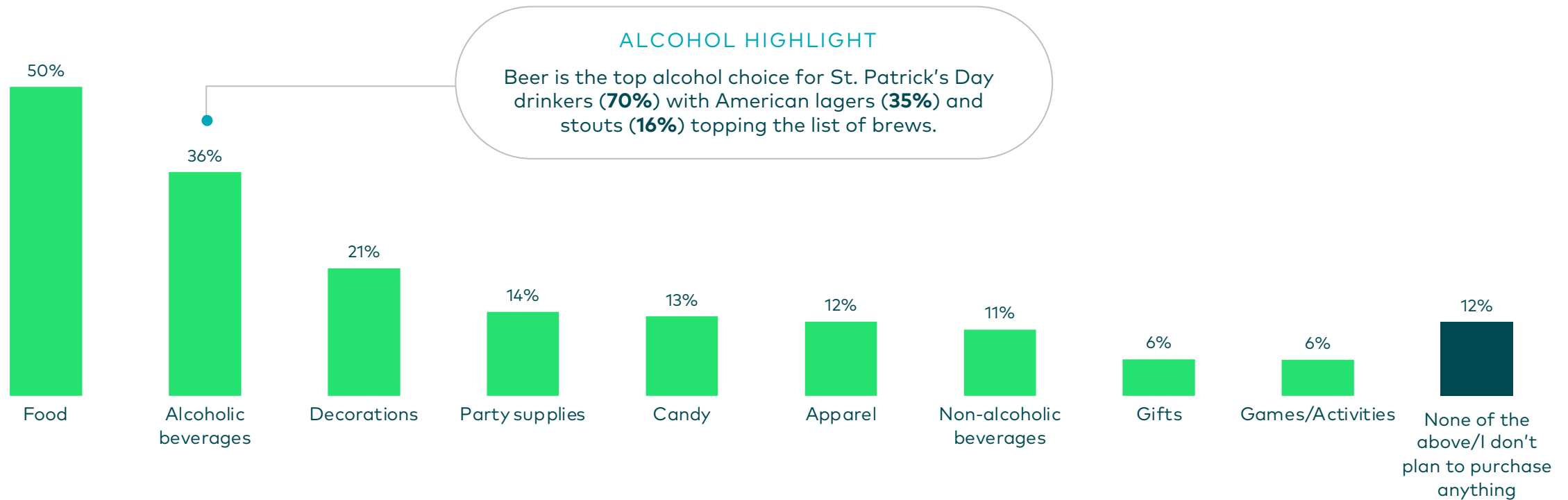


Food and brews will account for most St. Patrick's Day spending.

Half of St. Patrick's Day shoppers expect to buy food this year, and a over a third will purchase alcohol. Among those planning to purchase alcohol, most will opt for beer— specifically American lagers and stouts.

PURCHASE INTENTIONS

% of intended celebrators



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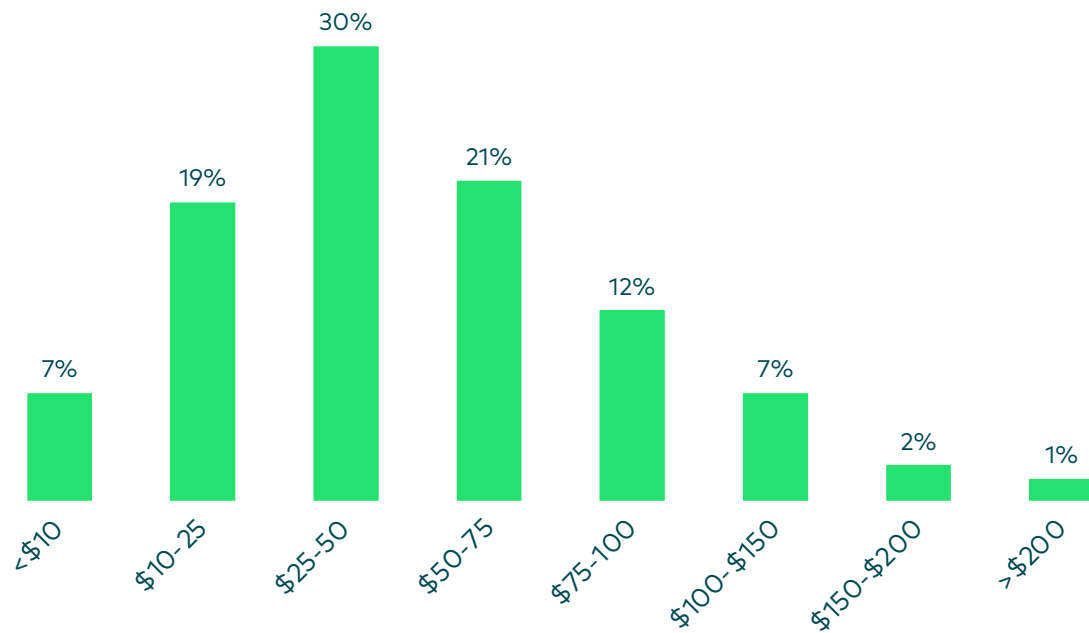
St. Patrick's Day shoppers expect to spend less this year compared to 2022.



Most St. Patrick's Day shoppers expect to spend between \$25 and \$50 on their holiday celebrations this year. Half of those who celebrated last year plan to spend the same amount this year, but over a third say they will spend less.

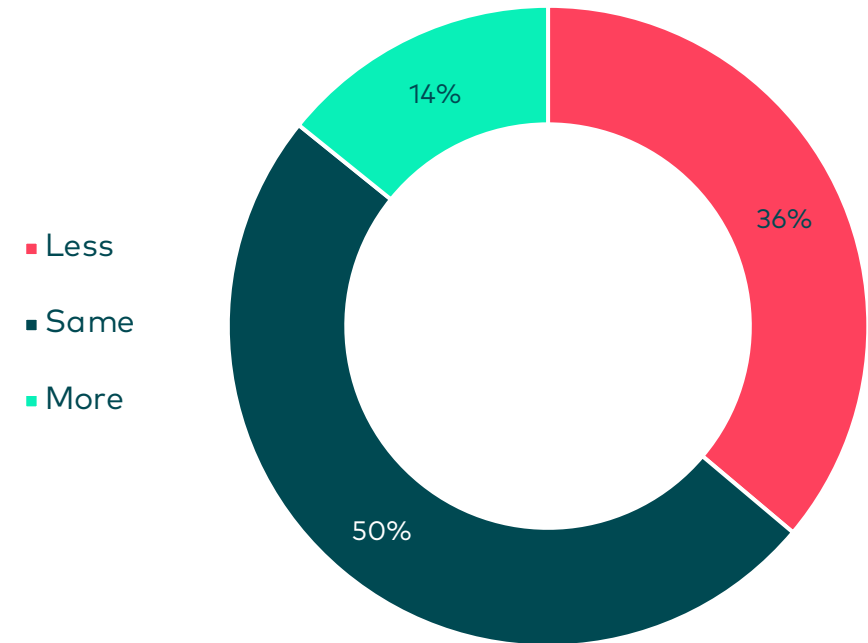
EXPECTED SPENDING

% of St. Patrick's Day shoppers



SPENDING VS. LAST YEAR

% of St. Patrick's Day shoppers



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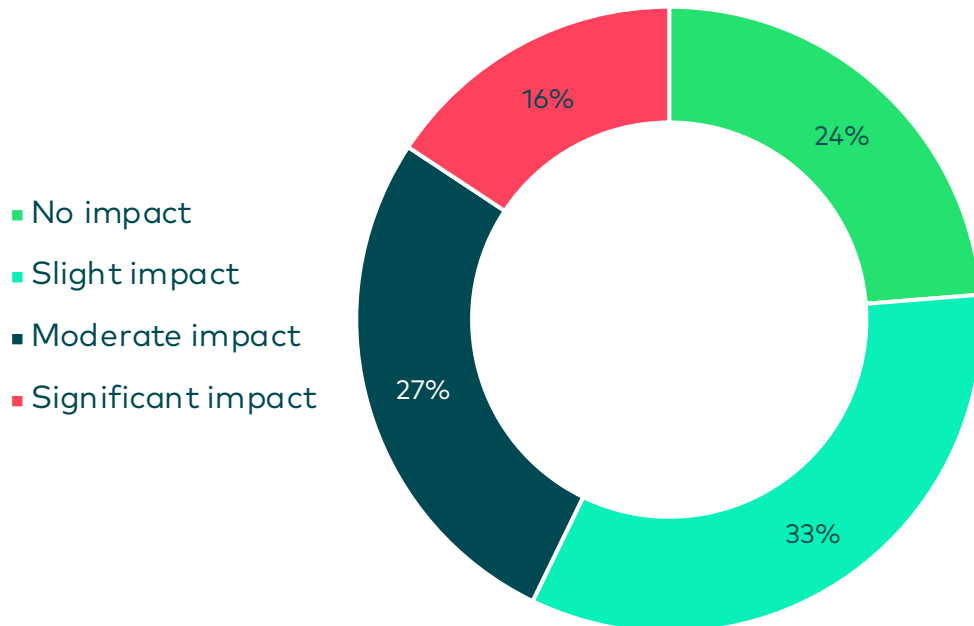
Few consumers expect economic hardships to impact their St. Patrick's Day.



Less than half of consumers expect inflation or a potential economic slowdown to impact their 2023 St. Patrick's Day celebrations and shopping. To save money, two-fifths of shoppers say they'll buy items on sale.

INFLATION & ECONOMIC IMPACT

% of holiday celebrators



MONEY SAVING MEASURES

% of holiday celebrators who will...



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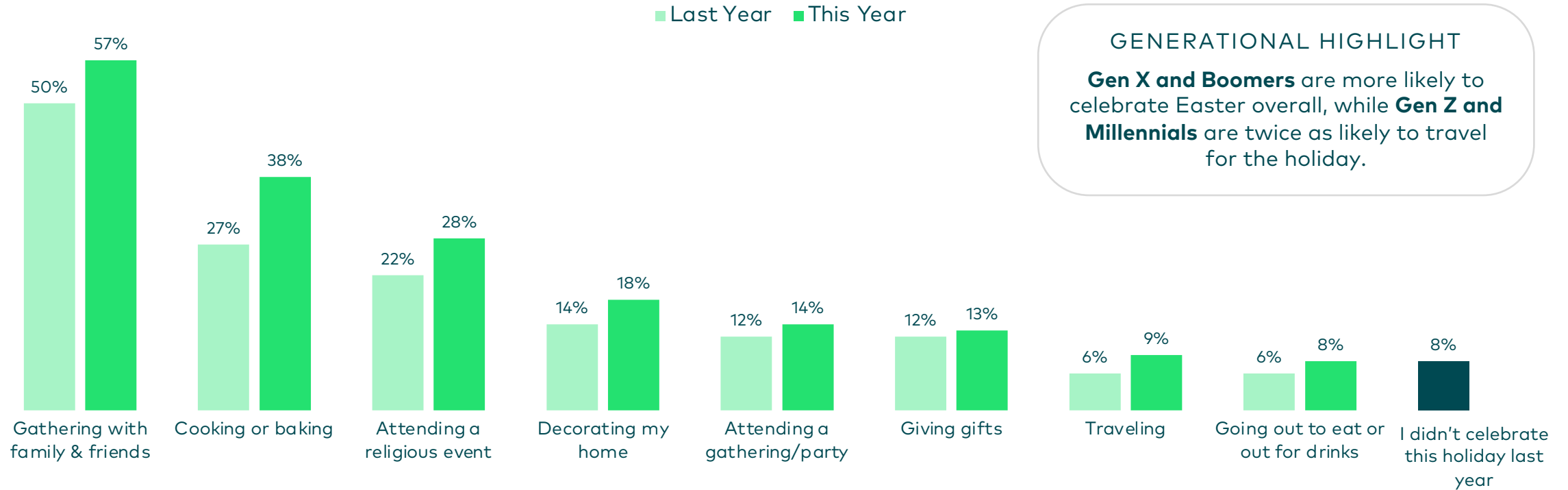


Easter gatherings and meals are expected to grow this year.

Among the 85% of consumers who plan to celebrate Easter, gathering with family & friends will be the top way to celebrate, followed by cooking or baking at home. Nearly a tenth of intended celebrators this year did not celebrate last year.

CELEBRATION INTENTIONS

% of intended celebrators



Source: Numerator 2023 Holiday Preview 1/19/2023 (n=5,263) | How do you intend to celebrate [holiday] this year?



Easter shoppers expect to fill their baskets with food, candy and gifts.

Nearly three-fourths of Easter shoppers expect to buy food this year, half will buy candy and a fifth will buy gifts. Toys & games will be the gift of choice for many Easter baskets, particularly among Millennial shoppers, who are more likely to have young kids.

PURCHASE INTENTIONS

% of intended celebrators



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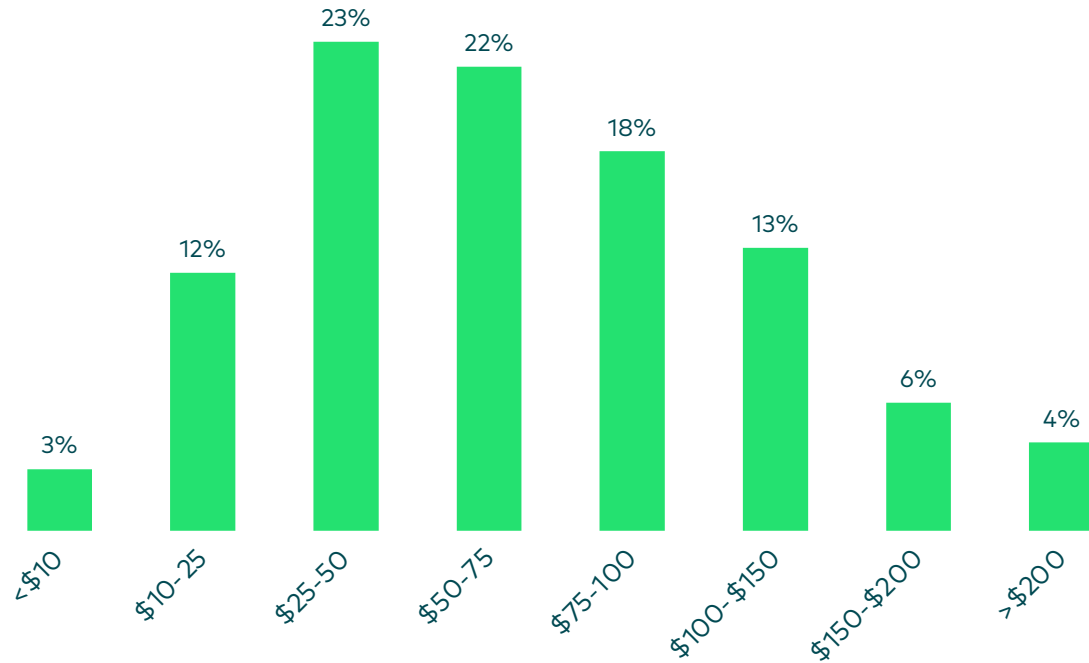


Easter shoppers expect to spend less this year compared to 2022.

Most Easter shoppers expect to spend between \$25 and \$75 on their holiday celebrations this year. Half of those who celebrated last year plan to spend the same amount this year, but a third say they will spend less.

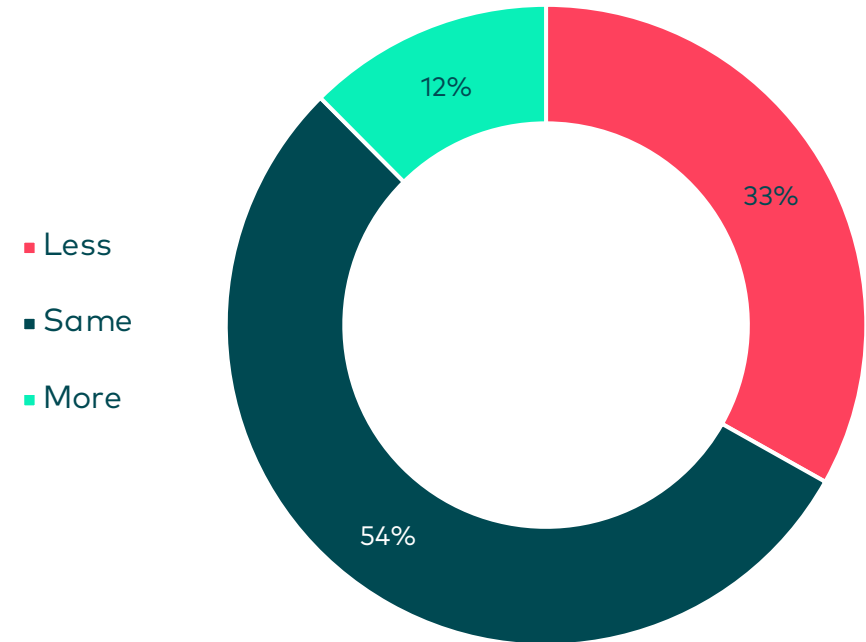
EXPECTED SPENDING

% of Easter shoppers



SPENDING VS. LAST YEAR

% of Easter shoppers



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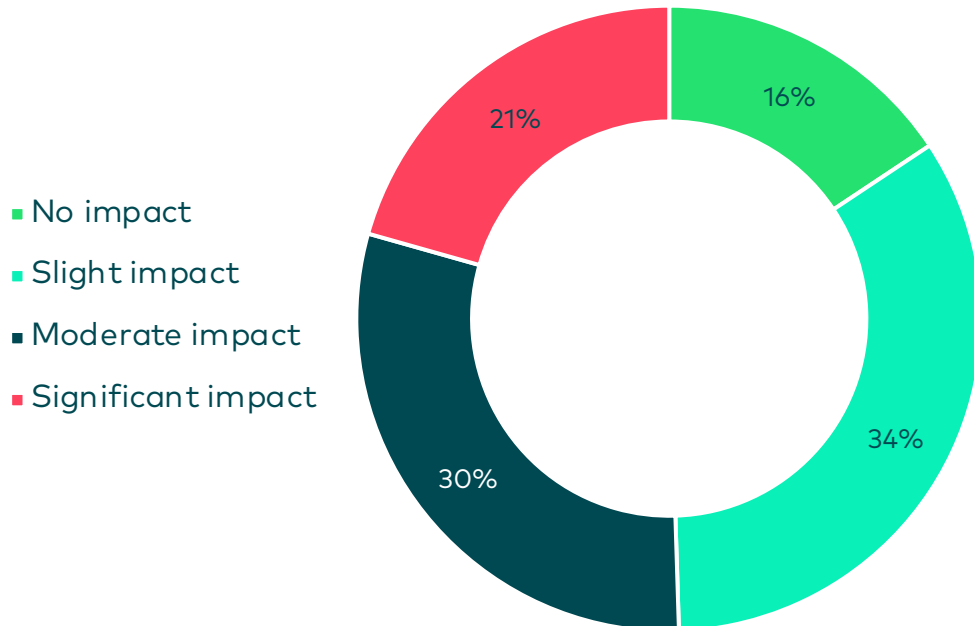


Consumers expect Easter plans to be impacted by economic hardships.

Half of consumers expect inflation or a potential economic slowdown to impact their 2023 Easter celebrations and shopping. To save money, over half of shoppers say they'll buy items on sale— the highest of any early 2023 winter & spring holidays.

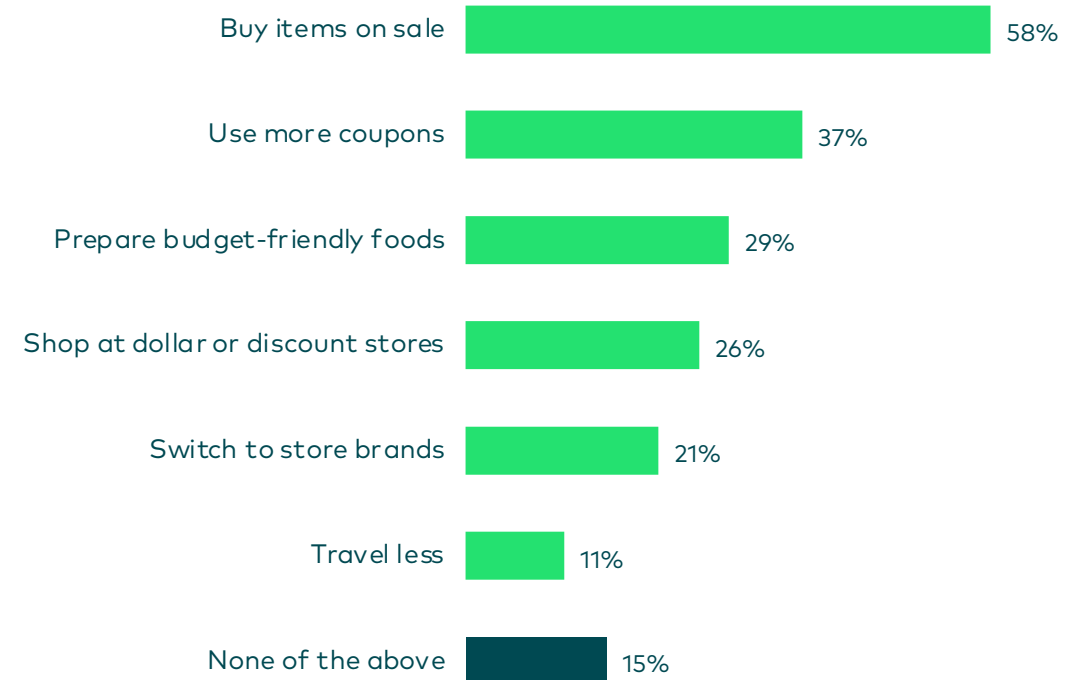
INFLATION & ECONOMIC IMPACT

% of holiday celebrators



MONEY SAVING MEASURES

% of holiday celebrators who will...



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Let **Numerator** help you 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.