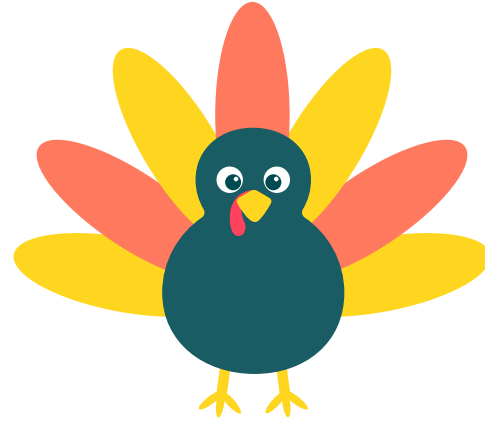# Numerator

Thanksgiving 2022

HOLIDAY INTENTIONS PREVIEW

A SINGLE DATA SOURCE. INFINITE INSIGHTS.

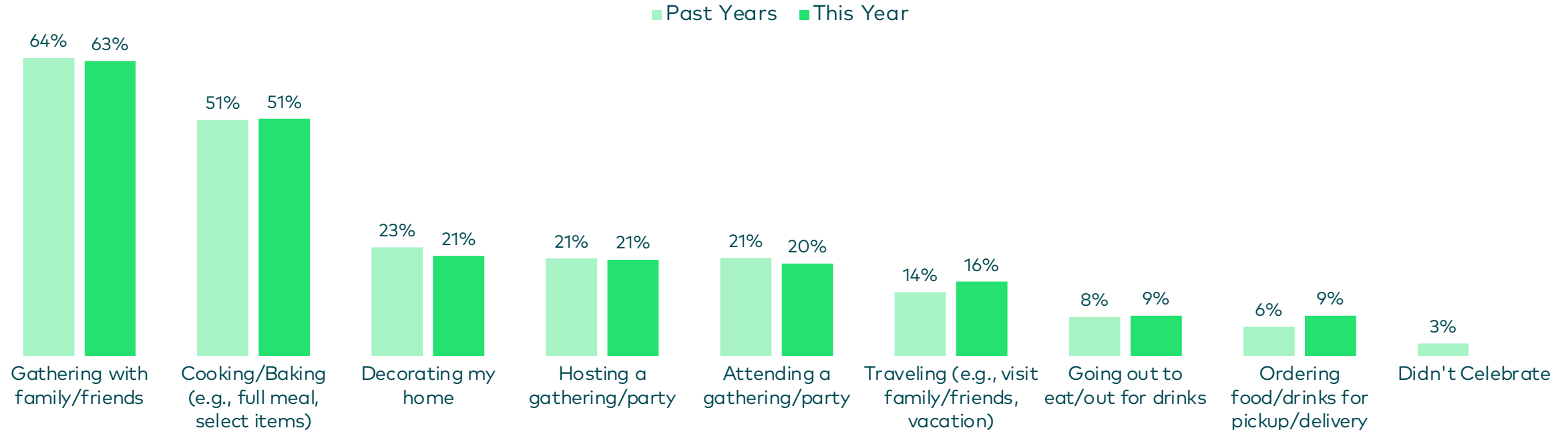# We asked 1,100 consumers about their upcoming Thanksgiving Plans.

Numerator's 2022 Thanksgiving survey was fielded to 1,090 consumers between 11/04/22 and 11/07/22, 95% of whom plan to celebrate Thanksgiving. The report showcases consumer celebration and shopping plans with added breakouts by generation. It also showcases expected inflationary impacts with views across Numerator's *New Realities Consumer Segments*, which group shoppers based on a variety of financial and lifestyle factors.

Numerator

Gathering and cooking will be the top celebration methods this Thanksgiving.

Most celebration types are expected to be on par compared to last year, with over half of Thanksgiving celebrators expecting to gather with others and share a meal. Travel intentions and plans to order pickup or delivery are up slightly this year over last.
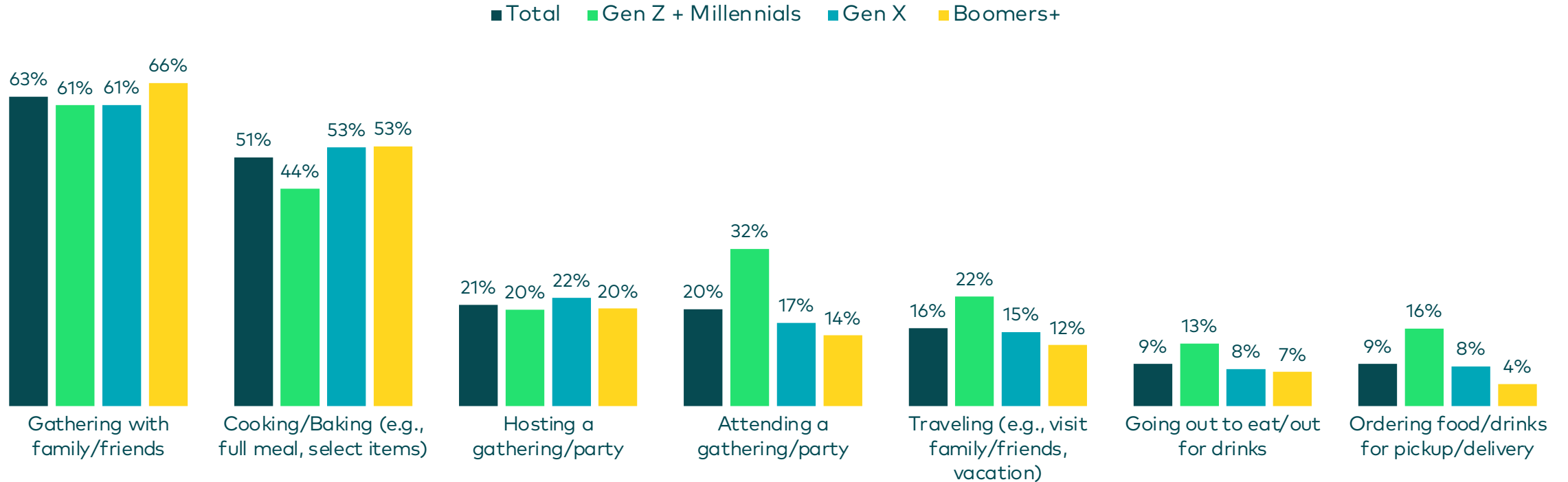
CELEBRATION PLANS
% of celebrators

■ Past Years ■ This Year

Category	Past Years	This Year
Gathering with family/friends	64%	63%
Cooking/Baking (e.g., full meal, select items)	51%	51%
Decorating my home	23%	21%
Hosting a gathering/party	21%	21%
Attending a gathering/party	21%	20%
Traveling (e.g., visit family/friends, vacation)	14%	16%
Going out to eat/out for drinks	8%	9%
Ordering food/drinks for pickup/delivery	6%	9%
Didn't Celebrate	3%	

Numerator

Generational Spotlight: **Thanksgiving Celebrations**

Intention to cook or bake this Thanksgiving increases with age, with younger shoppers much more likely to order food or go out to eat instead. Gen Z and Millennial consumers are also most likely to travel for the holiday or to attend rather than host.

CELEBRATION PLANS BY GENERATION
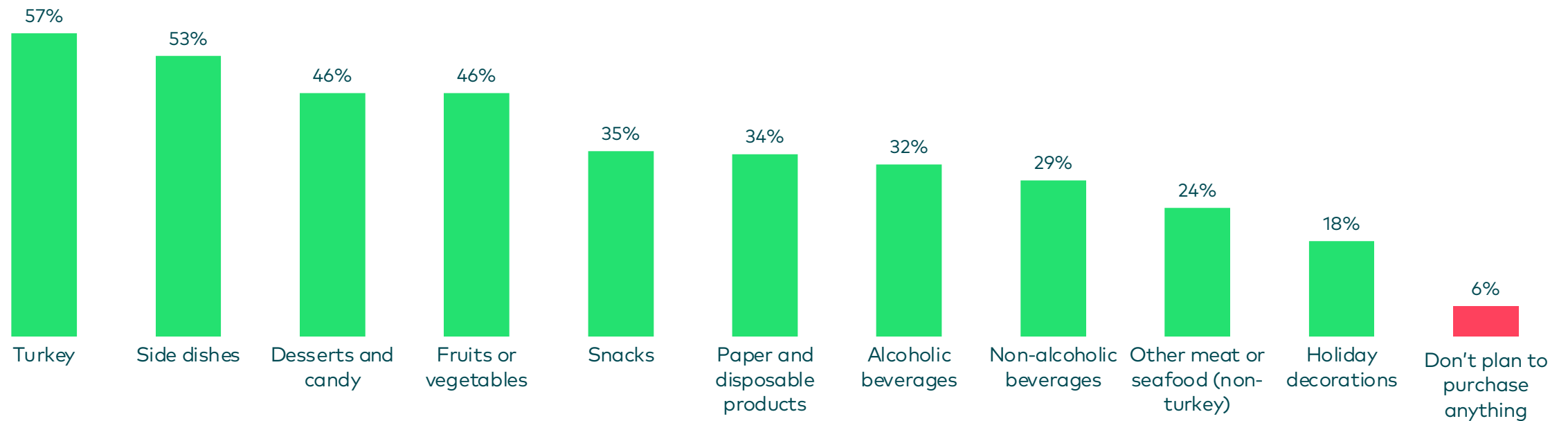% of Thanksgiving celebrators by segment

■ Total   ■ Gen Z + Millennials   ■ Gen X   ■ Boomers+

	Total	Gen Z + Millennials	Gen X	Boomers+
Gathering with family/friends	63%	61%	61%	66%
Cooking/Baking (e.g., full meal, select items)	51%	44%	53%	53%
Hosting a gathering/party	21%	20%	22%	20%
Attending a gathering/party	20%	32%	17%	14%
Traveling (e.g., visit family/friends, vacation)	16%	22%	15%	12%
Going out to eat/out for drinks	9%	13%	8%	7%
Ordering food/drinks for pickup/delivery	9%	16%	8%	4%

Source: Numerator Thanksgiving 2022 Survey (n= 1,032) How do you plan to celebrate Thanksgiving this year?

Numerator

Turkey tops the list for Thanksgiving purchases.

94% of shoppers expect to purchase something for their Thanksgiving celebrations this year. Just over half plan to buy turkey and and roughly half will buy side dishes, desserts or produce; one-fourth expect to buy alcohol, non-turkey meat or seafood.
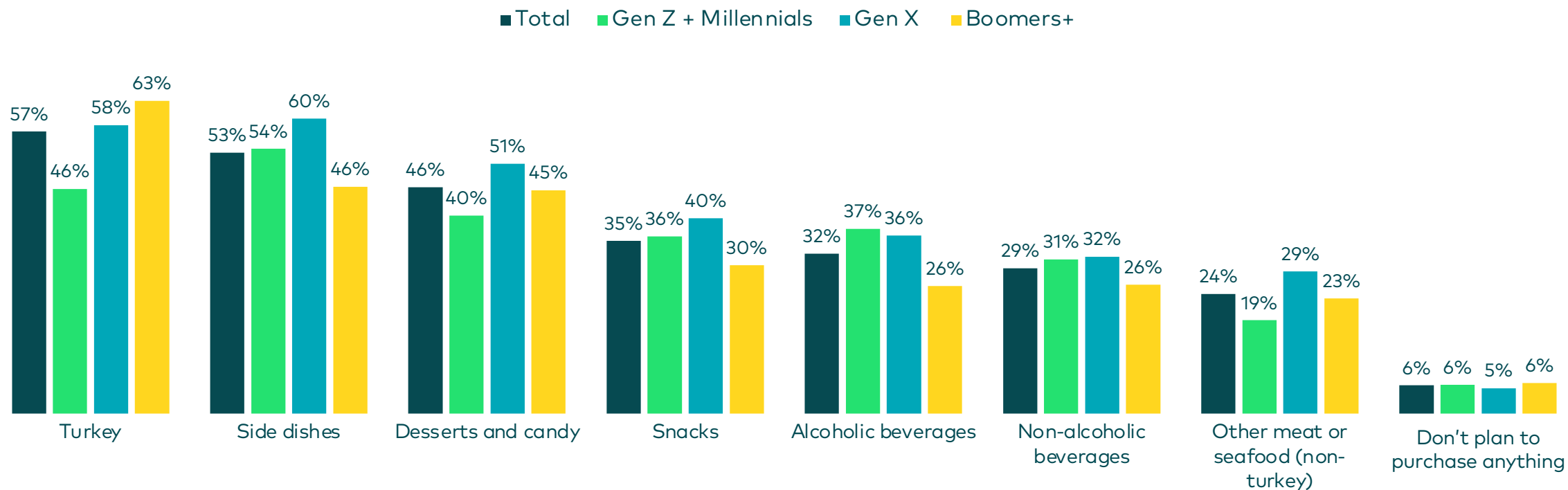
PURCHASE PLANS
% of Thanksgiving celebrators

Category	%
Turkey	57%
Side dishes	53%
Desserts and candy	46%
Fruits or vegetables	46%
Snacks	35%
Paper and disposable products	34%
Alcoholic beverages	32%
Non-alcoholic beverages	29%
Other meat or seafood (non-turkey)	24%
Holiday decorations	18%
Don't plan to purchase anything	6%

Numerator

Generational Spotlight: **Thanksgiving Shopping**

Older generations of shoppers will be responsible for getting the turkey this Thanksgiving, with Boomers significantly more likely than Gen Z & Millennials to buy the bird. Younger shoppers are the most likely to buy alcohol.

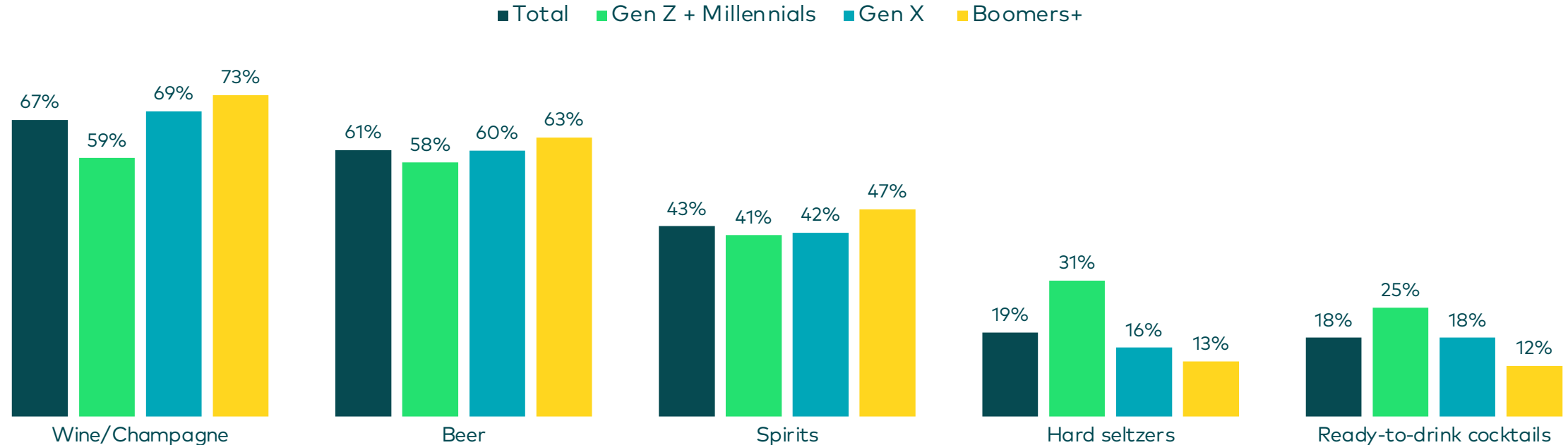## PURCHASE PLANS BY GENERATION
% of Thanksgiving celebrators by segment

■ Total   ■ Gen Z + Millennials   ■ Gen X   ■ Boomers+

Turkey: 57% 46% 58% 63%
Side dishes: 53% 54% 60% 46%
Desserts and candy: 46% 40% 51% 45%
Snacks: 35% 36% 40% 30%
Alcoholic beverages: 32% 37% 36% 26%
Non-alcoholic beverages: 29% 31% 32% 26%
Other meat or seafood (non-turkey): 24% 19% 29% 23%
Don't plan to purchase anything: 6% 6% 5% 6%

Numerator

Generational Spotlight: Thanksgiving Alcohol

Among those planning to purchase alcohol for their Thanksgiving festivities (32%), wine and beer are the top preferences. Gen Z and Millennial shoppers are more likely than other generations to opt for ready-to-drink cocktails or hard seltzers.

ALCOHOL TYPE BY GENERATION
Among those who expect to buy alcohol

■ Total   ■ Gen Z + Millennials   ■ Gen X   ■ Boomers+

	Total	Gen Z + Millennials	Gen X	Boomers+
Wine/Champagne	67%	59%	69%	73%
Beer	61%	58%	60%	63%
Spirits	43%	41%	42%	47%
Hard seltzers	19%	31%	16%	13%
Ready-to-drink cocktails	18%	25%	18%	12%

Numerator

Thanksgiving shopping will be an in-store affair focused on grocery.

The majority of Thanksgiving shoppers expect to make their purchases in-store, with a fifth (21%) planning to shop online. Grocery stores will be the destination of choice for over three-quarters of shoppers, followed by mass retailers and club stores.

PURCHASE LOCATIONS
% of Thanksgiving shoppers

90%
Expect to shop in-store

21%
Expect to shop online

Location	%
Grocery store	74%
Mass retailer	42%
Club store	32%
Liquor store	16%
Dollar store	12%
Online-only retailers	10%

Numerator

Shoppers expect to spend slightly more this year than last.

The bulk of consumers expect to spend between $50 and $150 on their Thanksgiving purchases this year, with 15% saying they'll spend $200+. Half of shoppers expect their spending to be in-line with past Thanksgivings, though a fourth say they'll spend more.
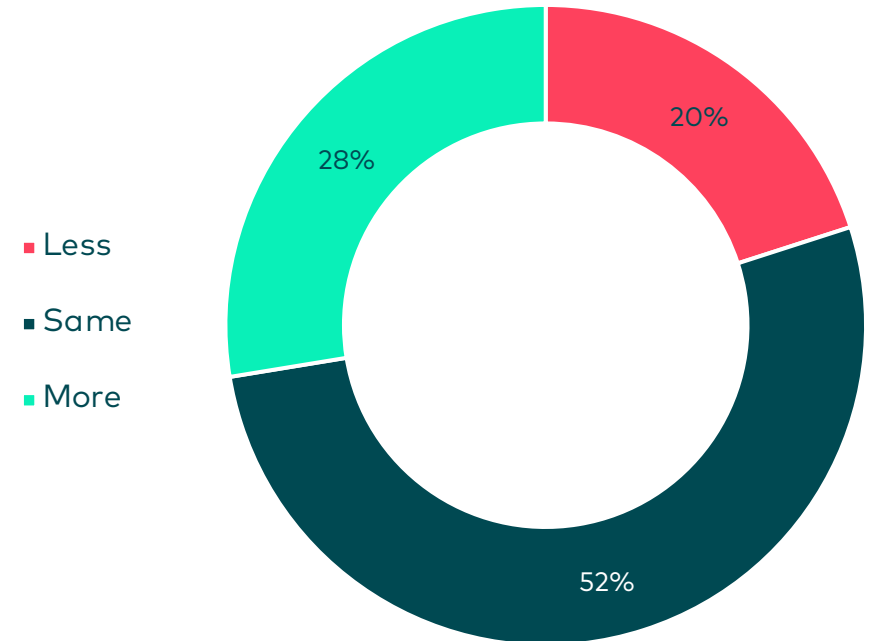
EXPECTED SPENDING
% Thanksgiving Shoppers

<$50	$50 to $99	$100 to $149	$150 to $199	$200 to $299	$300+
18%	30%	25%	12%	9%	6%
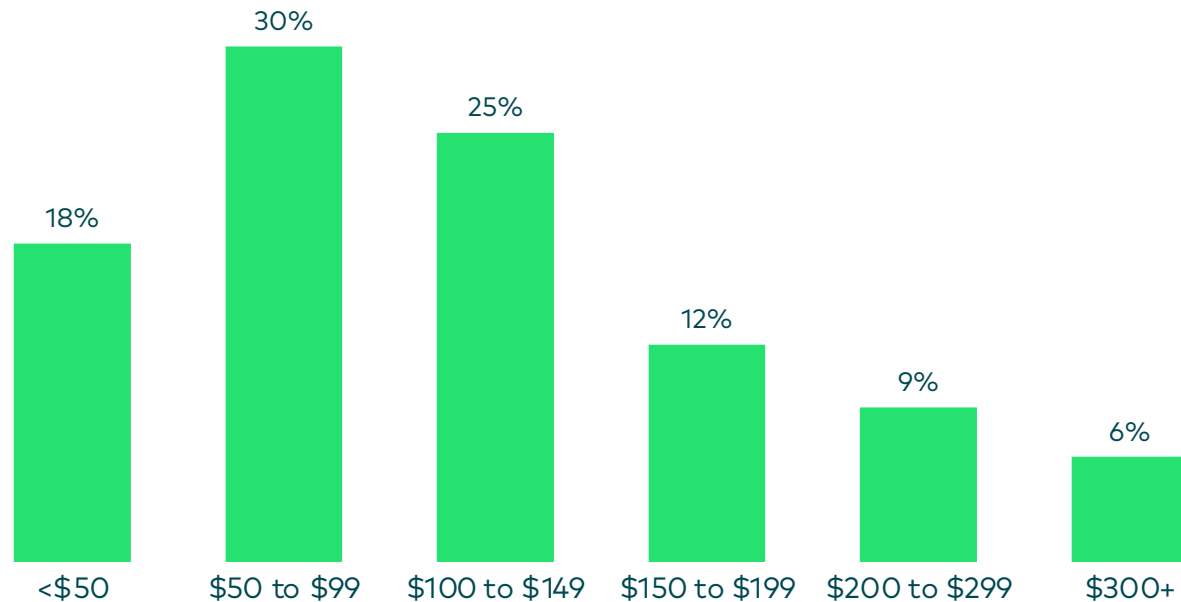
SPENDING VS. PAST YEARS
% of Thanksgiving Shoppers

- Less — 20%
- Same — 52%
- More — 28%

Numerator

Most Thanksgiving shopping will be completed by the week prior.

Nearly two-thirds of consumers say they'll do their Thanksgiving shopping two weeks or more before the holiday, with another third planning to shop one week prior.
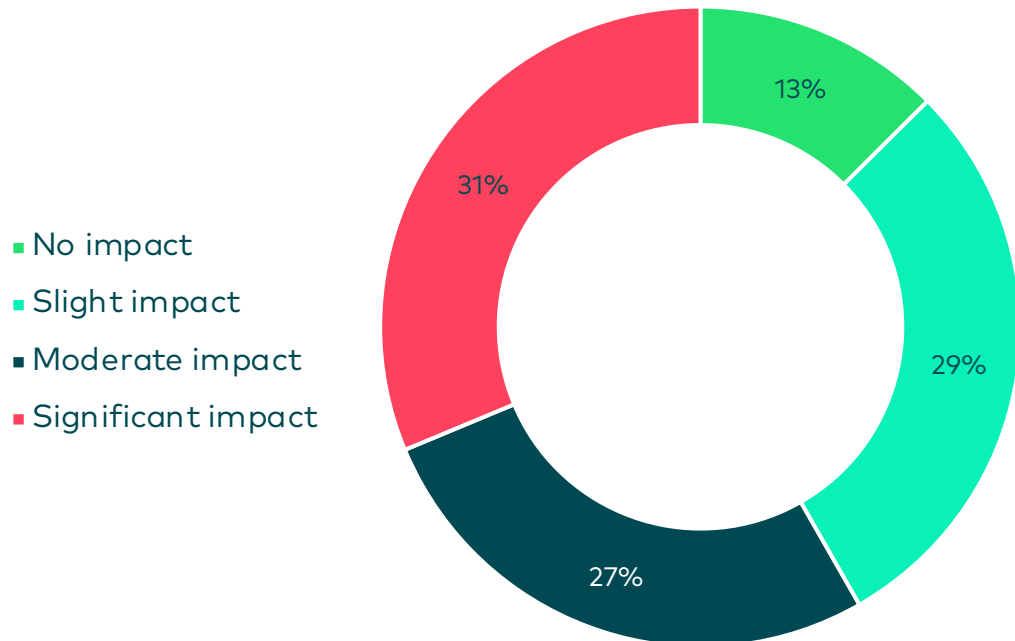
EXPECTED SHOPPING TIMING
% of Thanksgiving Shoppers
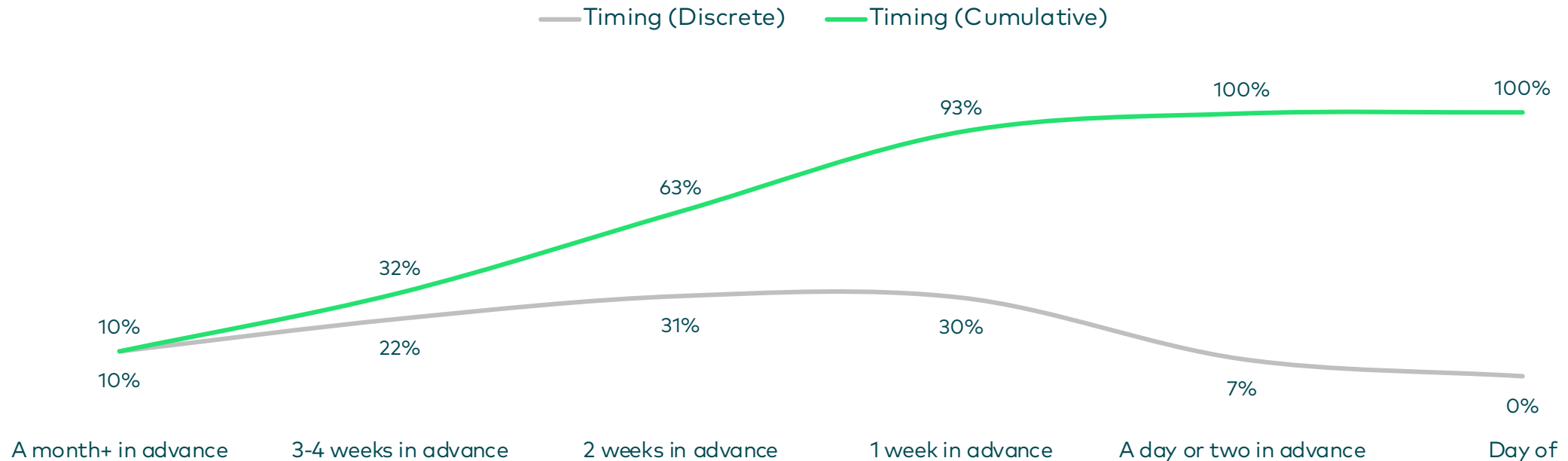
—— Timing (Discrete)   —— Timing (Cumulative)

	A month+ in advance	3-4 weeks in advance	2 weeks in advance	1 week in advance	A day or two in advance	Day of
Cumulative	10%	32%	63%	93%	100%	100%
Discrete	10%	22%	31%	30%	7%	0%

Numerator

Most consumers expect inflation to impact their Thanksgiving.

A third of consumers believe inflation will significantly impact their Thanksgiving plans, and this nearly doubles among struggling, low purchase power households– those being hit hardest by inflation generally with little discretionary income.
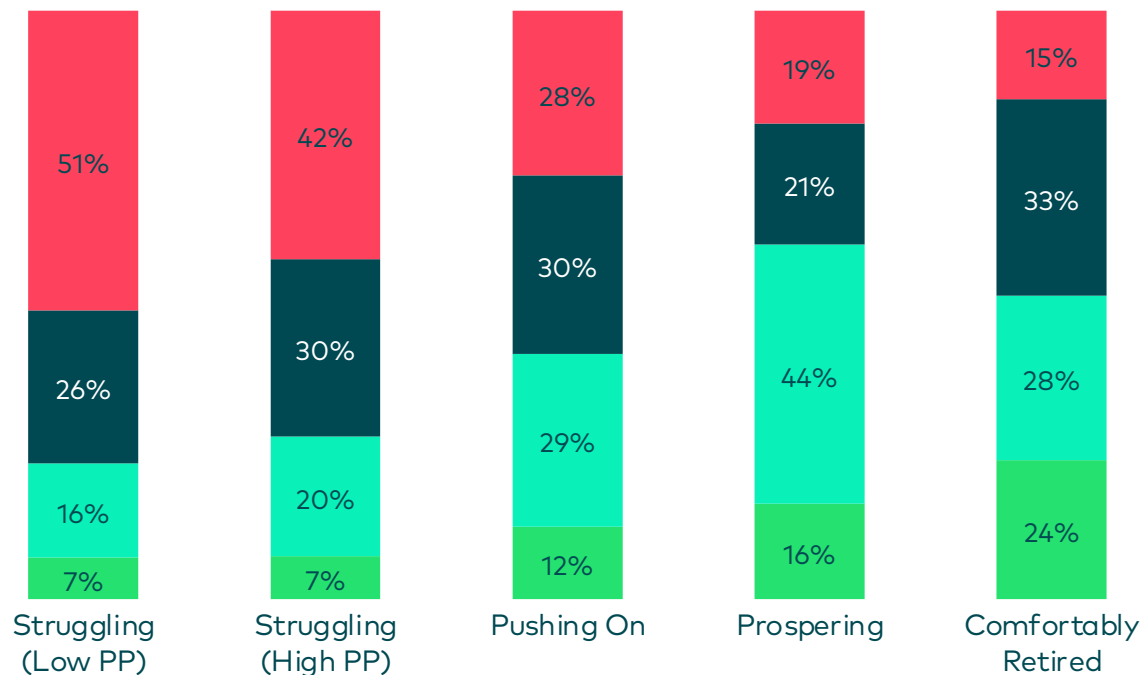
EXPECTED INFLATION IMPACT
% of Thanksgiving Celebrators

- No impact
- Slight impact
- Moderate impact
- Significant impact

13%
29%
27%
31%

IMPACT BY SEGMENT
% of group

Struggling (Low PP)
- 51%
- 26%
- 16%
- 7%

Struggling (High PP)
- 42%
- 30%
- 20%
- 7%

Pushing On
- 28%
- 30%
- 29%
- 12%

Prospering
- 19%
- 21%
- 44%
- 16%

Comfortably Retired
- 15%
- 33%
- 28%
- 24%

Numerator

About a fourth expect to celebrate on a smaller scale as prices rise.

Another fourth of consumers say they will travel less or not at all this Thanksgiving due to inflation. All expected impacts are higher among struggling household, while "prospering" or "comfortably retired" consumers are the least likely to change their plans.

INFLATION IMPACT ON PLANS
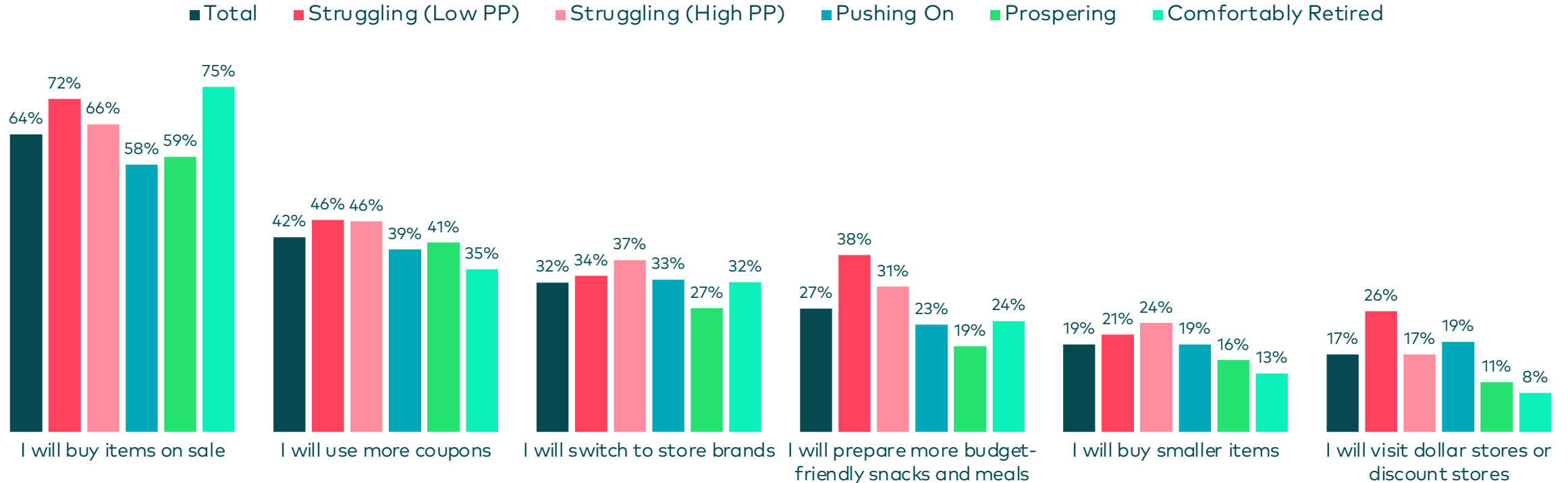% of Thanksgiving celebrators by segment
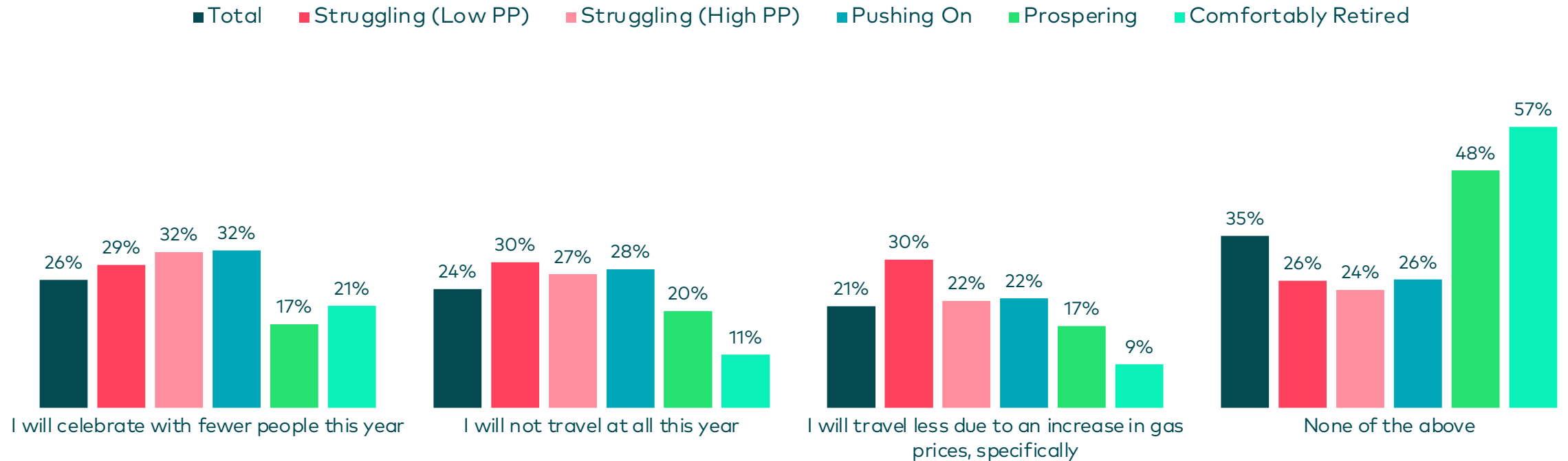
Legend: ■ Total ■ Struggling (Low PP) ■ Struggling (High PP) ■ Pushing On ■ Prospering ■ Comfortably Retired

I will celebrate with fewer people this year
- Total: 26%
- Struggling (Low PP): 29%
- Struggling (High PP): 32%
- Pushing On: 32%
- Prospering: 17%
- Comfortably Retired: 21%

I will not travel at all this year
- Total: 24%
- Struggling (Low PP): 30%
- Struggling (High PP): 27%
- Pushing On: 28%
- Prospering: 20%
- Comfortably Retired: 11%

I will travel less due to an increase in gas prices, specifically
- Total: 21%
- Struggling (Low PP): 30%
- Struggling (High PP): 22%
- Pushing On: 22%
- Prospering: 17%
- Comfortably Retired: 9%

None of the above
- Total: 35%
- Struggling (Low PP): 26%
- Struggling (High PP): 24%
- Pushing On: 26%
- Prospering: 48%
- Comfortably Retired: 57%

Numerator

Most Thanksgiving shoppers will adjust their buying habits this year.

While plans may stay the same, 94% of Thanksgiving shoppers say they'll take some measures to offset inflation, with most opting for sales or coupons to save money. Some will turn to discount or dollar stores, particularly struggling households.

INFLATION IMPACT ON SHOPPING
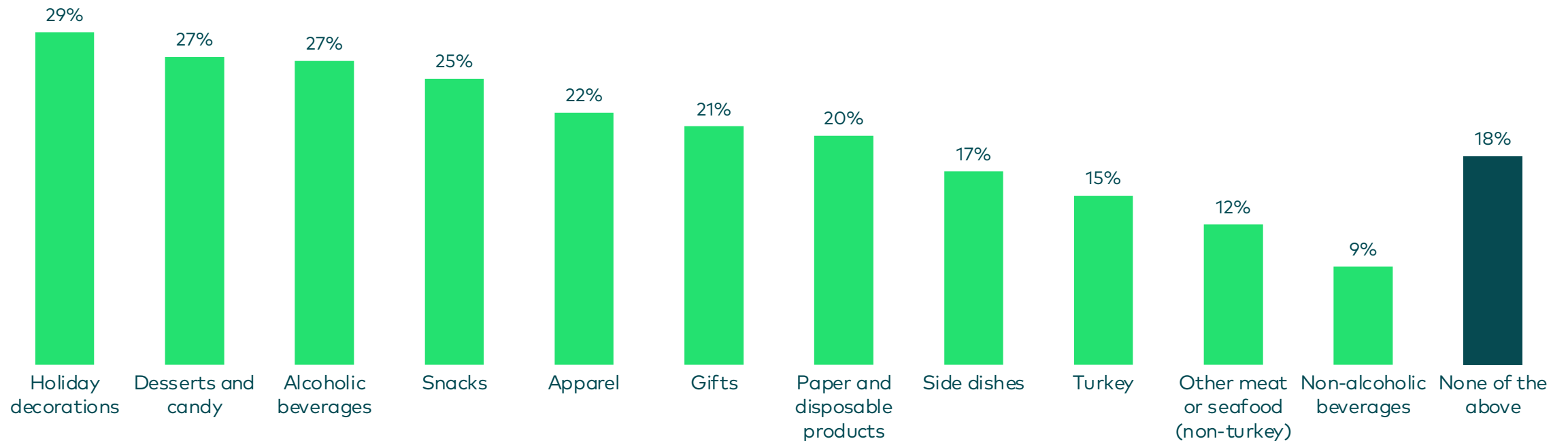% of Thanksgiving celebrators by segment

Legend: ■ Total ■ Struggling (Low PP) ■ Struggling (High PP) ■ Pushing On ■ Prospering ■ Comfortably Retired

I will buy items on sale: 64%, 72%, 66%, 58%, 59%, 75%

I will use more coupons: 42%, 46%, 46%, 39%, 41%, 35%

I will switch to store brands: 32%, 34%, 37%, 33%, 27%, 32%

I will prepare more budget-friendly snacks and meals: 27%, 38%, 31%, 23%, 19%, 24%

I will buy smaller items: 19%, 21%, 24%, 19%, 16%, 13%

I will visit dollar stores or discount stores: 17%, 26%, 17%, 19%, 11%, 8%

Numerator

Thanksgiving shoppers won't sacrifice side dishes or turkey.

82% of shoppers say they'll cut back on specific Thanksgiving categories due to inflation. Decorations are the most likely items to be cut from the basket, while few shoppers are willing to cut back on produce, sides or main courses like meat & seafood.

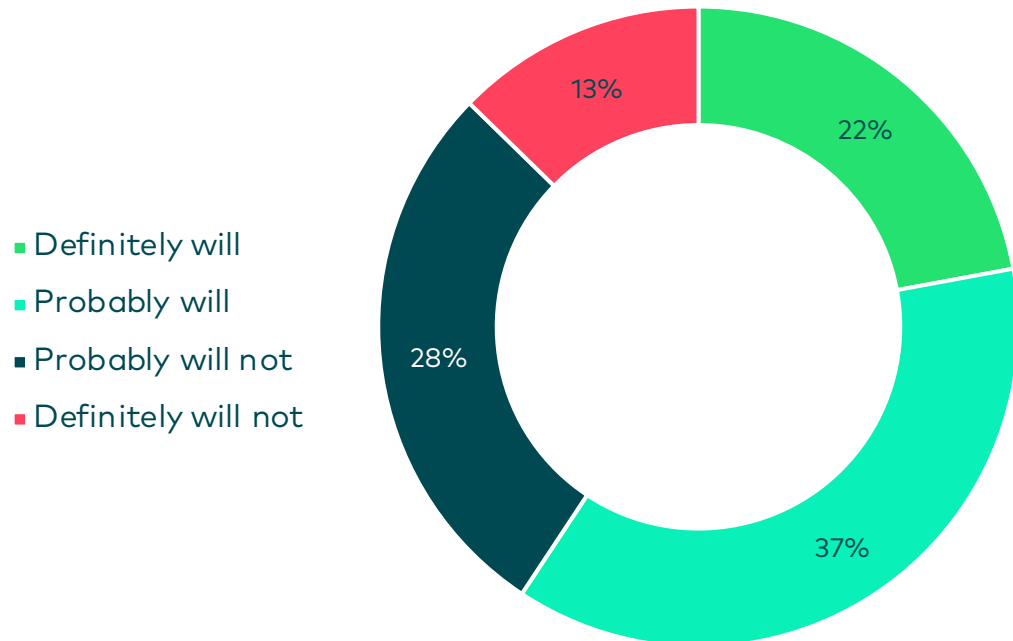## SPENDING CUTS
% of Thanksgiving celebrators

Category	%
Holiday decorations	29%
Desserts and candy	27%
Alcoholic beverages	27%
Snacks	25%
Apparel	22%
Gifts	21%
Paper and disposable products	20%
Side dishes	17%
Turkey	15%
Other meat or seafood (non-turkey)	12%
Non-alcoholic beverages	9%
None of the above	18%

Numerator

Over half of shoppers expect to participate in Thanksgiving weekend sales.

Just over half (59%) of shoppers say they probably or definitely will participate sales events over Thanksgiving weekend. Among those who expect to shop, Black Friday will be the most popular day, followed by Cyber Monday.
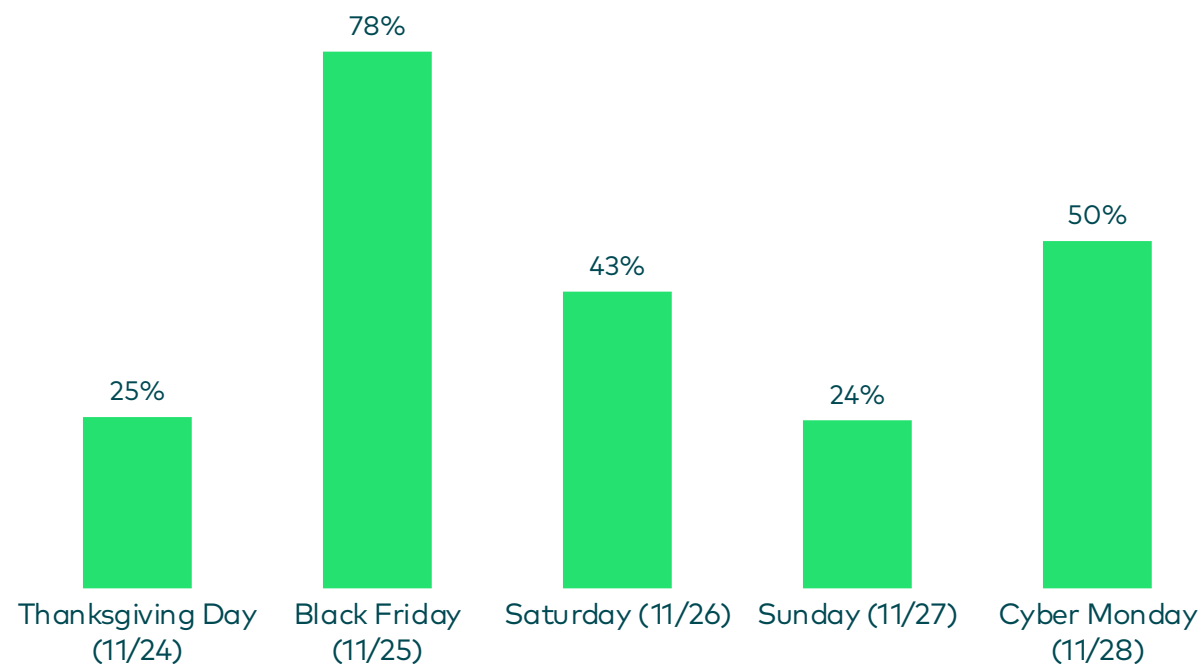
THANKSGIVING WEEKEND SALES
% of shoppers who will / won't participate

- Definitely will
- Probably will
- Probably will not
- Definitely will not

22%
13%
28%
37%

PLANNED SHOPPING DAYS
% of shoppers who "probably or definitely will" shop

25%	78%	43%	24%	50%
Thanksgiving Day (11/24)	Black Friday (11/25)	Saturday (11/26)	Sunday (11/27)	Cyber Monday (11/28)

Numerator

Holiday gifts will be the most popular item at Thanksgiving weekend sales.

61% of shoppers say they'll use Thanksgiving sales like Black Friday or Cyber Monday to purchase holiday gifts, over a third will purchase items for themselves or their households.

PLANNED ITEM TYPES
% of Thanksgiving weekend shoppers

61% Gifts for the holidays	**42%** Items for members of household	**36%** Items for self
25% Everyday goods	**25%** Large ticket items	**23%** Non-holiday gifts

Numerator

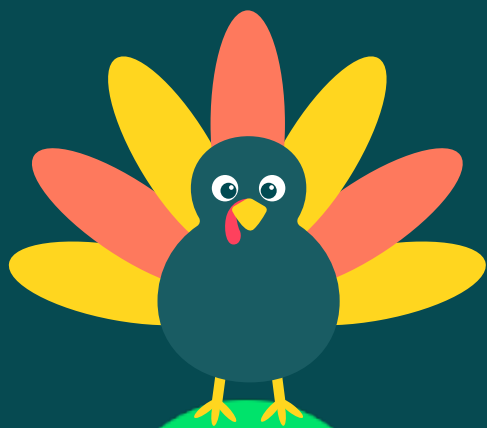# Toys, games, apparel and gift cards top the Cyber Weekend shopping list.

About a third of shoppers say they'll purchase toys & games, apparel & shoes, gift cards or home goods during Thanksgiving Weekend Sales. Other popular categories include electronics, household essentials, small appliances and accessories.

PLANNED CATEGORIES (TOP 10)

% of Thanksgiving weekend shoppers

Category	%
Toys or games	37%
Apparel or shoes	36%
Gift cards	33%
Home goods (kitchenware, bedding, décor, etc.)	31%
Electronics (cellphones, gaming devices, laptops/tablets, etc.)	30%
Household essentials (cleaning products, trash bags, etc.)	17%
Small appliances (coffee makers, slow cookers, vacuums, etc.)	17%
Accessories (bags, belts, scarves, etc.)	16%
Pet products	15%
Health/Wellness products	13%

Numerator

Numerator

Gobble up more 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 more information on leveraging the New Realities Segments or conducting your own custom segmentation study to bring your shopper insights to life, reach out through the same channels.

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

Appendix: New Realities Inflation Segments

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

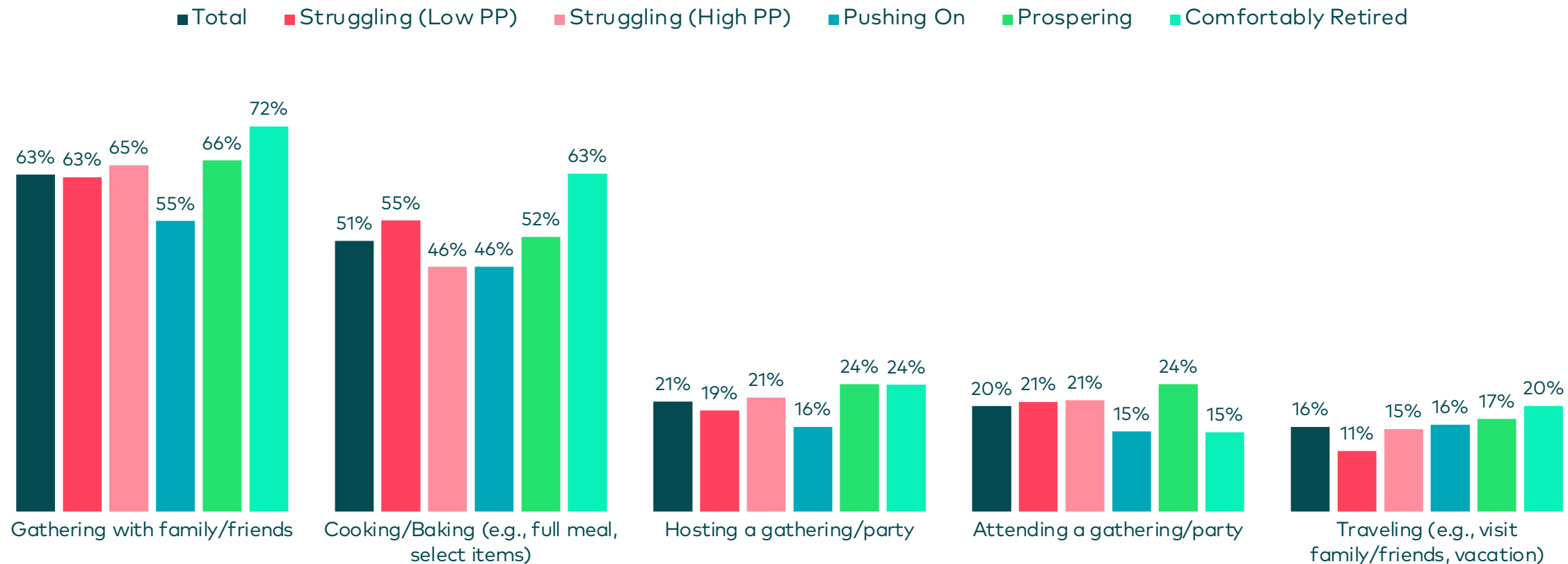| STRUGGLING (LOW PP)	STRUGGLING (HIGH PP)	PUSHING ON	PROSPERING	COMFORTABLY RETIRED
50% Boomers+ (150)	44% Boomers+ (133)	39% Gen Z / Millennial (140)	74% Millennial / Gen X (121)	74% Age 65+ (362)
64% Low Income (264)	64% High Income (137)	59% Low Income (231)	78% High Income (168)	55% High Income (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

Appendix: Celebration Plans by Segment

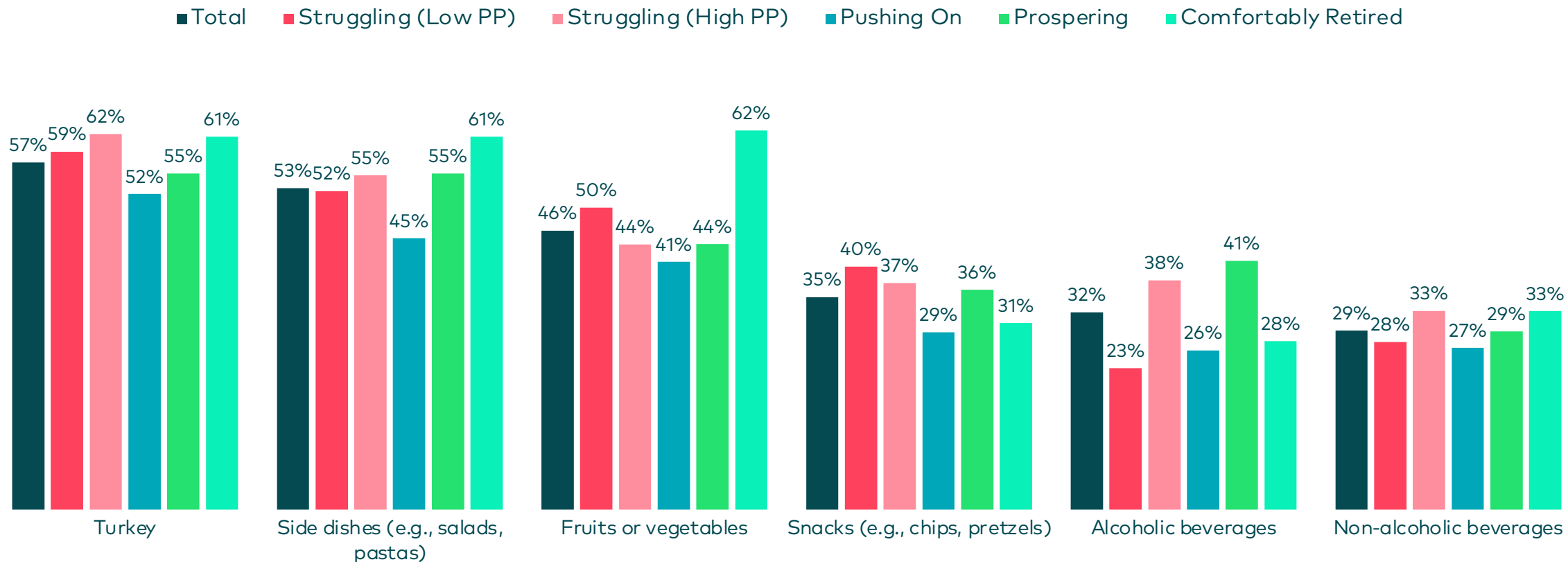## CELEBRATION PLANS BY SEGMENT

% of Thanksgiving celebrators by segment

Legend: ■ Total ■ Struggling (Low PP) ■ Struggling (High PP) ■ Pushing On ■ Prospering ■ Comfortably Retired

Gathering with family/friends
- Total: 63%
- Struggling (Low PP): 63%
- Struggling (High PP): 65%
- Pushing On: 55%
- Prospering: 66%
- Comfortably Retired: 72%

Cooking/Baking (e.g., full meal, select items)
- Total: 51%
- Struggling (Low PP): 55%
- Struggling (High PP): 46%
- Pushing On: 46%
- Prospering: 52%
- Comfortably Retired: 63%

Hosting a gathering/party
- Total: 21%
- Struggling (Low PP): 19%
- Struggling (High PP): 21%
- Pushing On: 16%
- Prospering: 24%
- Comfortably Retired: 24%

Attending a gathering/party
- Total: 20%
- Struggling (Low PP): 21%
- Struggling (High PP): 21%
- Pushing On: 15%
- Prospering: 24%
- Comfortably Retired: 15%

Traveling (e.g., visit family/friends, vacation)
- Total: 16%
- Struggling (Low PP): 11%
- Struggling (High PP): 15%
- Pushing On: 16%
- Prospering: 17%
- Comfortably Retired: 20%

Numerator

Appendix: Purchase Plans by Segment

PURCHASE PLANS BY SEGMENT

% of Thanksgiving celebrators by segment

■ Total ■ Struggling (Low PP) ■ Struggling (High PP) ■ Pushing On ■ Prospering ■ Comfortably Retired

Turkey: 57%, 59%, 62%, 52%, 55%, 61%

Side dishes (e.g., salads, pastas): 53%, 52%, 55%, 45%, 55%, 61%

Fruits or vegetables: 46%, 50%, 44%, 41%, 44%, 62%

Snacks (e.g., chips, pretzels): 35%, 40%, 37%, 29%, 36%, 31%

Alcoholic beverages: 32%, 23%, 38%, 26%, 41%, 28%

Non-alcoholic beverages: 29%, 28%, 33%, 27%, 29%, 33%

Numerator

Appendix: Thanksgiving Weekend Sale Participation by Segment

THANKSGIVING WEEKEND SALES

% of shoppers who will / won't participate

- Definitely will
- Probably will
- Probably will not
- Definitely will not

Donut chart:
- 22% Definitely will
- 37% Probably will
- 28% Probably will not
- 13% Definitely will not

INTENTIONS BY SEGMENT

% of shoppers who will / won't participate

	Struggling (Low PP)	Struggling (High PP)	Pushing On	Prospering	Comfortably Retired
Definitely will not	18%	10%	12%	13%	12%
Probably will not	32%	35%	22%	22%	36%
Probably will	30%	35%	39%	45%	30%
Definitely will	19%	20%	27%	21%	23%

Numerator