PMG × GWI.

Holiday Consumer Insights Report

2023

PMG X GWI

Foreword

Ready or not, the 2023 holiday season is well underway. U.S. consumers kicked off a marathon gift-gifting season with Amazon Prime Day in October and they'll continue to shop leading up to Christmas Day, indicating the importance of advertising throughout this extended window. As we look to understand shifting consumer sentiment and behavior amidst increased economic pressures, this report in partnership with GlobalWebIndex is crafted to serve as your compass for guiding holiday marketing and media planning decisions.

PMG × GWI.

The PMG Holiday Insights Survey with GlobalWebIndex (GWI) surveyed 3,013 internet users aged 18+, a sample of GWI USA survey respondents, on their holiday shopping intentions, gifting, spending attitudes, and travel plans this year.

Key Takeaways & Recommendations

1

Products and campaigns that highlight value for money and deals could make an impact in light of inflation.

- Americans are concerned about the current economic environment and have spent less across categories, particularly apparel and out-of-home entertainment, this year.
- Shoppers planning to spend more on holiday shopping this year due to rising costs. They're also going into holiday shopping with strict budgets, though there's still some room for impulse buying–especially among Gen Z.

2

It is important for brands to get in front of consumers with holiday promotions early.

- Around a fifth of Gen Z and millennials say they start holiday shopping during Amazon Prime's early access sale in October. Many across age groups get their shopping started between then and the end of November.
- People will continue to shop leading up to Christmas Day though, so it's important to continue advertising throughout the holiday period.

3

Ads across digital and social channels and influencer content will be essential as consumers look for inspiration.

- Gen Z can best be reached via audio content during holiday downtime, and this group is more likely than other generations to find inspiration from influencer content when holiday shopping. TV is key for targeting other age groups.
- Upcoming holiday travelers are still in the process of planning their trips. This points to opportunities for travel brands to get in front of consumers across channels leading up to the holiday season.

Contents

Holiday Shopping, Spending, Attitudes & Behaviors

PMG x GWI Research Shows Continued Consumer Resilience, Especially Among Gen Z

While the macroeconomic environment retains a measure of uncertainty and volatility, many promising signs point to consumers' continued capacity—and eagerness—to shop, spend, and celebrate this holiday.

The standout feature of this year's insights is the unwavering optimism and resilience of Gen Z. Gen Z seem the most resilient and optimistic about their holiday spending plans. Nearly 4 in 10 plan to resume their delayed spending this holiday season, and only 6% say they don't plan to resume it at all. Particular attention should be given to this group over the next few months as they return to spending.

Financial Attitudes

% who agree with the following statements

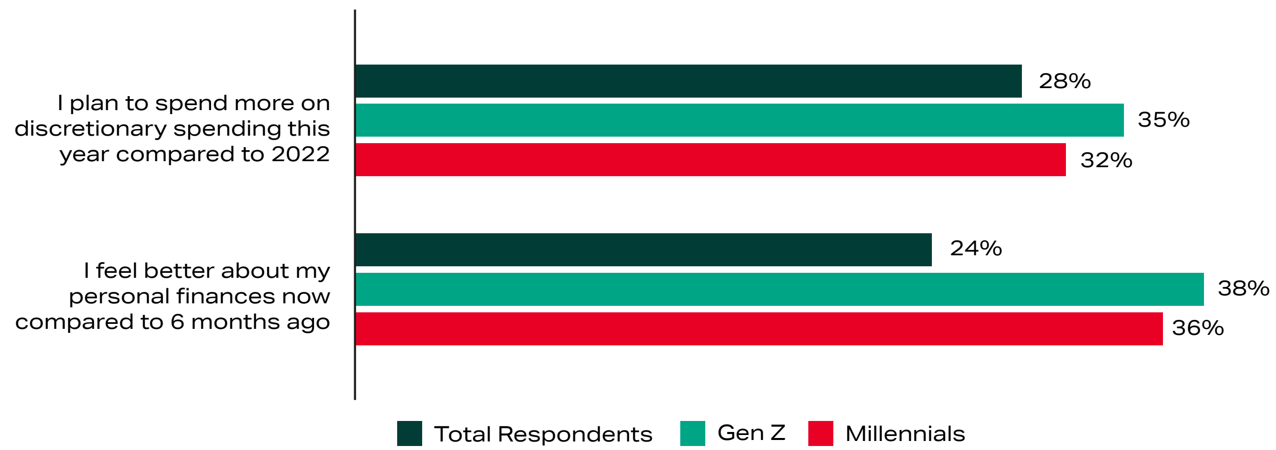
	Gen Z	Millennial	All other ages
I'm **concerned about the current economic environment**	69%	71%	78%
I've **delayed purchases this year** due to inflation	57%	49%	49%
I **feel better about my personal finances now** compared to 6 months ago	38%	36%	24%
I **plan to spend more on the holidays this year** because of rising costs	37%	37%	27%
I **plan to spend more on discretionary spending this year** compared to 2022	35%	32%	28%

Source: GWI x PMG Holiday Study 2023. Base: Among internet users, 182 Gen Z (aged 18-26), 1,320 millennials (aged 27-40) and 1,511 consumers of all other ages (aged 41-99). Market: US.

CONTINUED CONSUMER RESILIENCE

An impressive 38% of Gen Zers express a brighter outlook on their finances compared to six months ago. This optimism surpasses millennials at 36% and other generations at 24%. Understanding this positivity is crucial for brands seeking to connect with Gen Z.

A Third of Consumers Report Improved Financial Outlook



Source: PMG's 2023 Holiday Shopper Insights Survey with GlobalWebIndex

15%

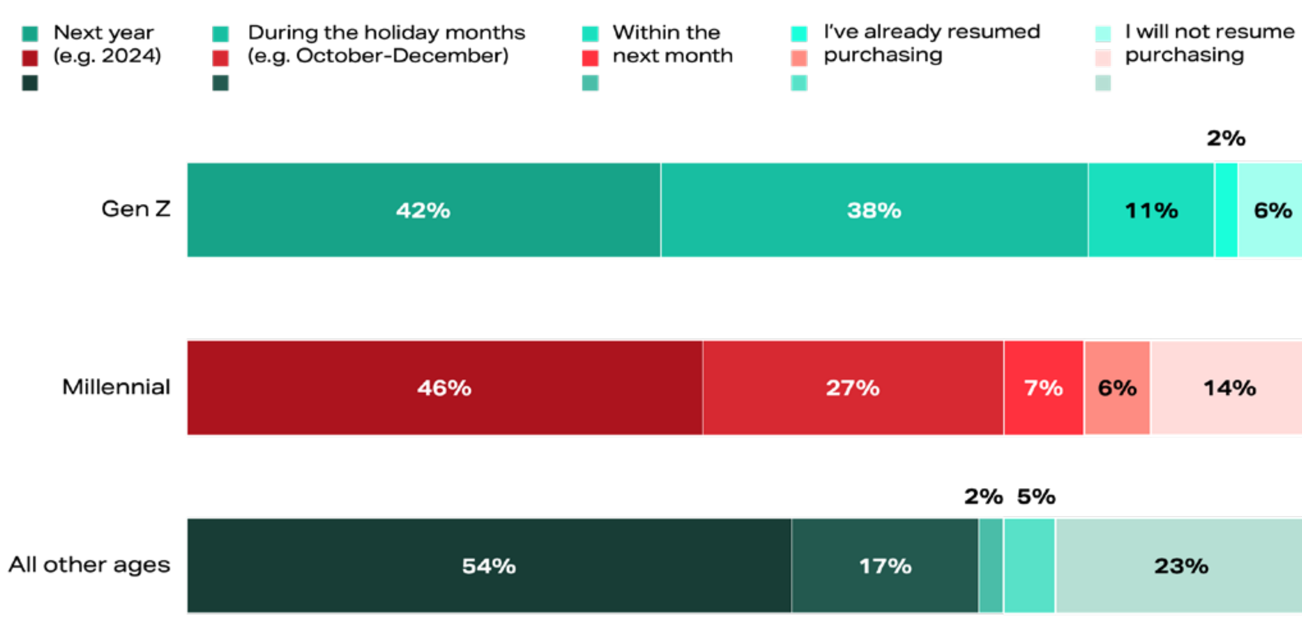
Gen Z is more optimistic about their personal finances compared to older generations. They are also 15% more likely to spend more on discretionary purchases than last year's spending patterns.

Shoppers Prioritize Price & Quality This Holiday Season

According to PMG & GWI's holiday research, one-third of consumers have delayed purchases due to inflation this year, reporting that they plan to resume those purchases during the holiday season or have already resumed shopping. While U.S. consumers may have the capacity to spend, recent months have seen a notable shift in their overall spending patterns. Shoppers are making more thoughtful, deliberate choices when spending on apparel and accessories, demonstrating a greater awareness of their financial well-being and purchase decisions.

Time Frame for Resuming Purchases Delayed by Inflation

Among those who said they've delayed purchases because of inflation, % who say they plan to resume those purchases in the followng timeframe



Source: GWI x PMG Holiday Study 2023. Base: Among internet users who've delayed purchases this year due to inflation, 109 Gen Z (aged 18-26), 668 millennials (aged 27-40) and 755 consumers of all other ages (aged 41-99). Market: US.

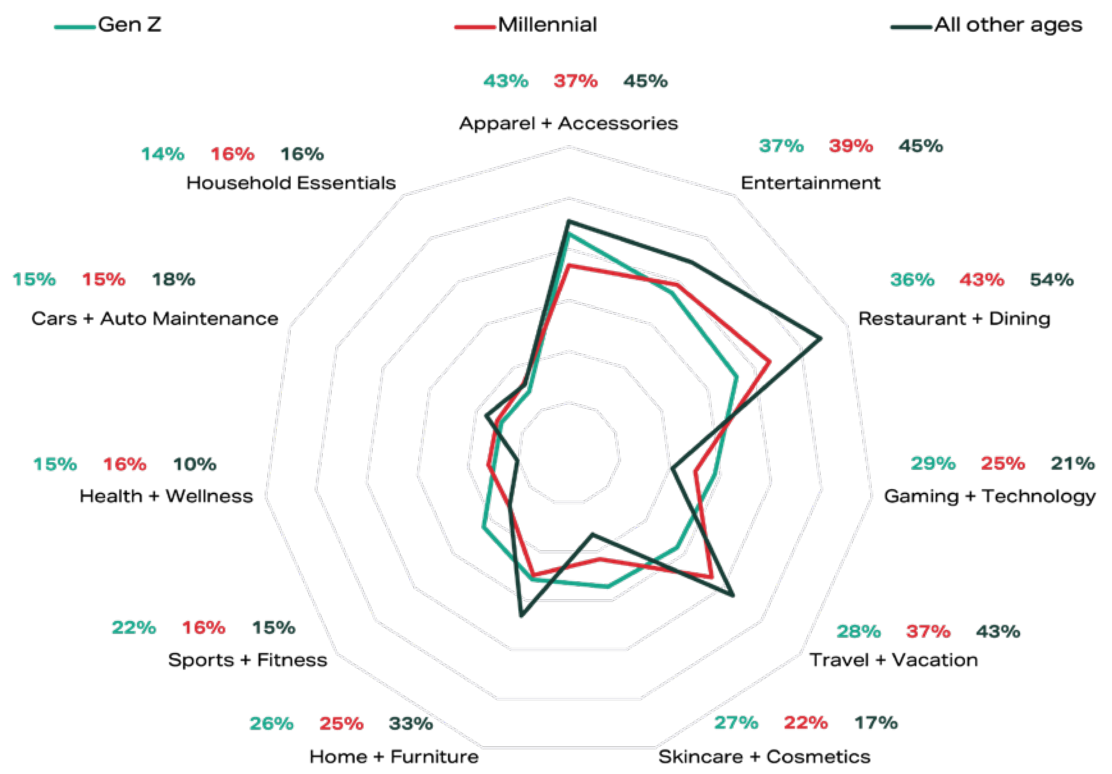
PRIORITIZING PRICE & QUALITY

Despite the challenges posed by rising costs across categories, consumers remain committed to maintaining their holiday shopping plans, demonstrating continued resilience and adaptability.

Our findings unveil new spending patterns amidst the backdrop of economic shifts. While cost-cutting measures have affected various spending categories, health and wellness remain top priorities, with 85% to 90% of shoppers across generations maintaining their investments in well-being. Conversely, apparel and entertainment have seen reductions in spending, making them noteworthy candidates for industry attention. The good news for apparel and accessories brands is that consumers are planning to spend in these categories for their holiday shopping lists.

Categories Spent Less on This Year Than Last Year

% who say they've spent less on the following categories this year compared to last year



Source: GWI x PMG Holiday Study 2023. Base: Among internet users, 182 Gen Z (aged 18-26), 1,320 millennials (aged 27-40) and 1,511 consumers of all other ages (aged 41-99). Market: US.

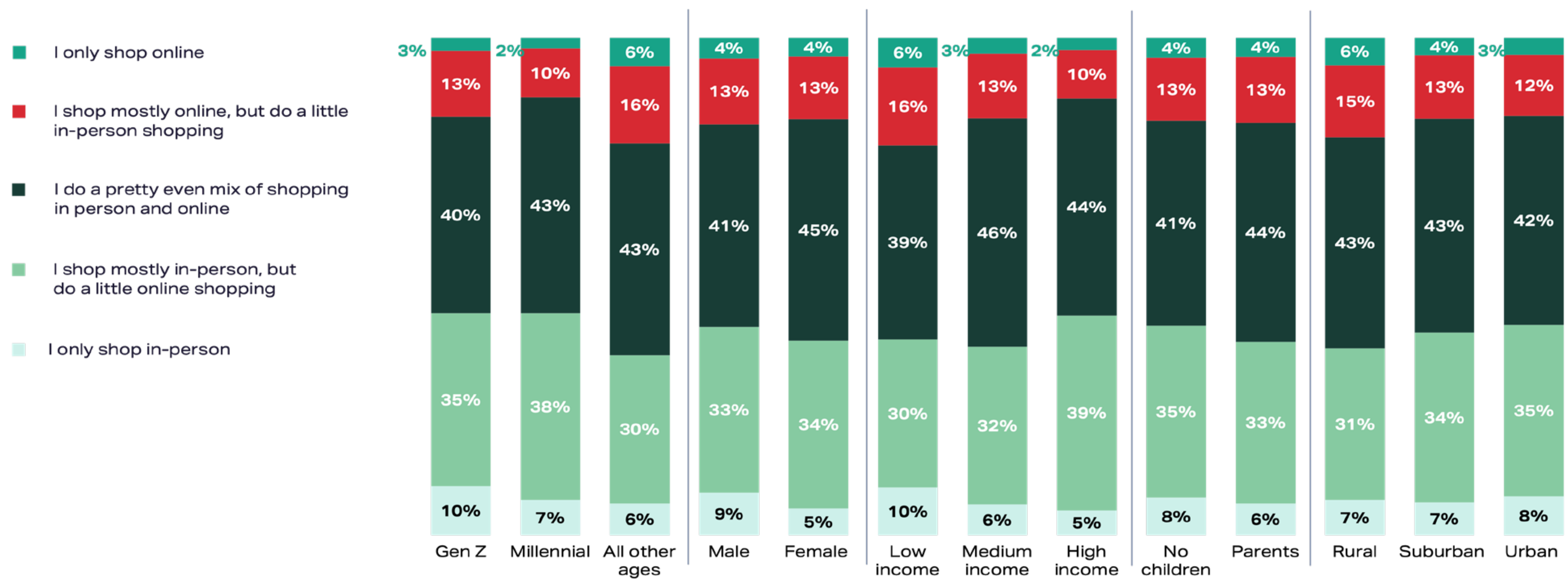
> *Consumers have reduced spending on apparel and going out this year, instead prioritizing their health and necessities.*

A Mix of Online and In-Store Shopping Expected This Season

Shoppers plan to do a mix of in-store and online gift shopping, though high income and younger shoppers plan to shop more online.

Gift Shopping Locations

Among those who intend to go holiday shopping this year, % who say they shop for gifts…



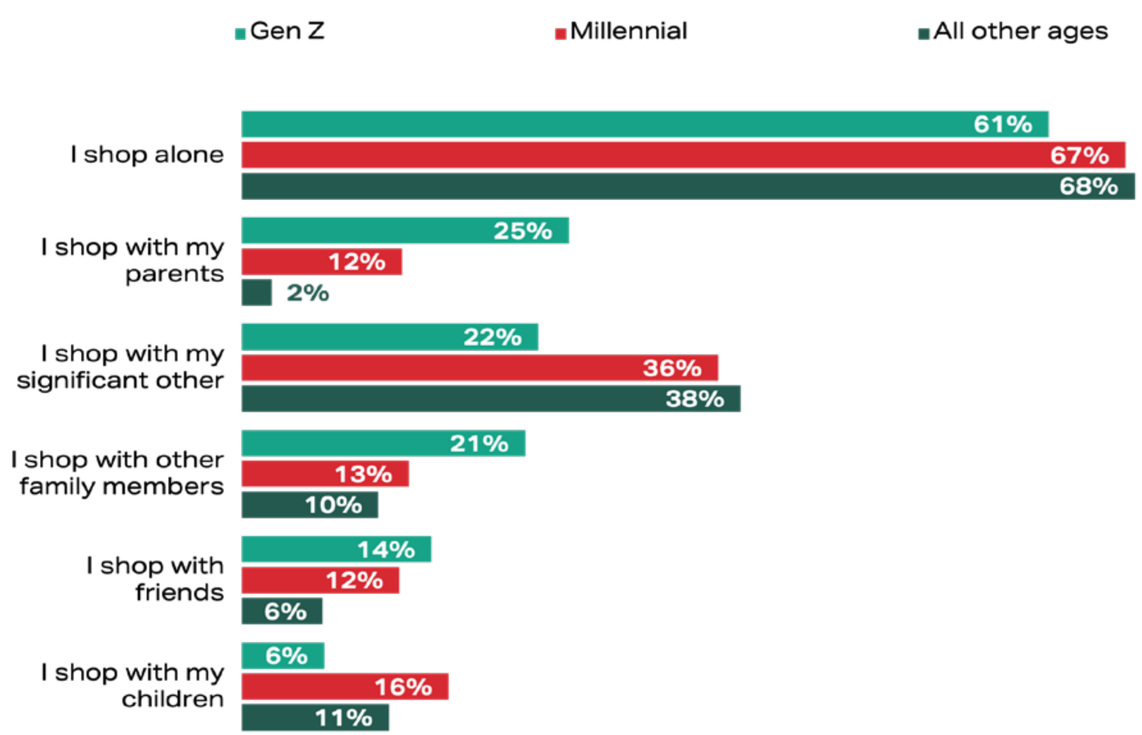
Source: GWI x PMG Holiday Study 2023. Base: Among internet users who intend to go holiday shopping this year, 169 Gen Z (aged 18-26), 1,206 millennials (aged 27-40), 1,341 consumers of all other ages (aged 41-99), 1,026 males, 1,690 females, 852 low income, 993 medium income, 810 high income, 1,222 without children, 1,494 parents, 583 rural, 1,505 suburban and 628 urban internet users. Market: US.

ONLINE AND IN-STORE SHOPPING

A quarter of Gen Z gift shop with their parents, so it's important that advertisements and gifts aimed at this group are family-friendly in cases where parents may be the final decision-makers. Over a third of other age groups gift shop with their significant others.

Shopping Solo: Most People Search for Gifts Alone

Among those who shop for holiday gifts in person, % who say they shop with the following people

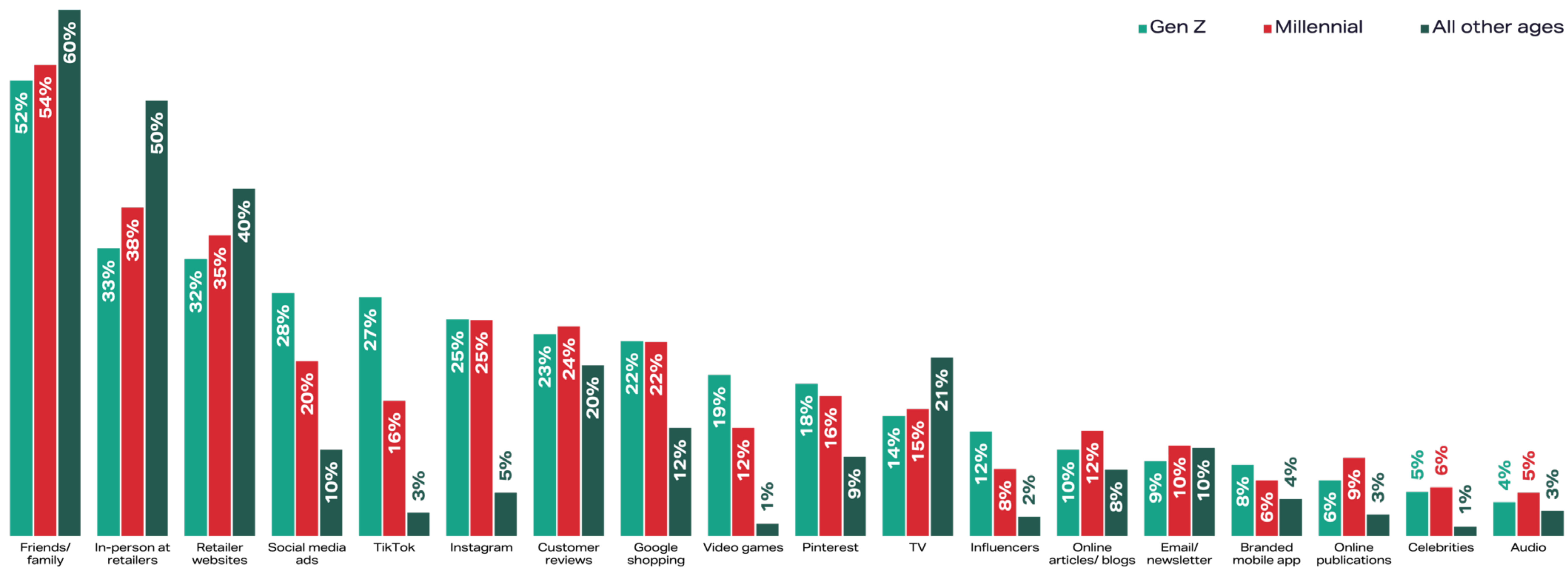


Source: GWI x PMG Holiday Study 2023. Base: Among internet users who gift shop in person, 155 Gen Z (aged 18-26), 1,125 millennials (aged 27-40) and 1,254 consumers of all other ages (aged 41-99). Market: US.

ONLINE AND IN-STORE SHOPPING

Holiday Shopping Inspiration Channels

Among those who intend to go holiday shopping this year, % who say they turn to the following channels for inspiration when holiday shopping for others



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Holiday Shoppers Opt for Quality Over Quantity

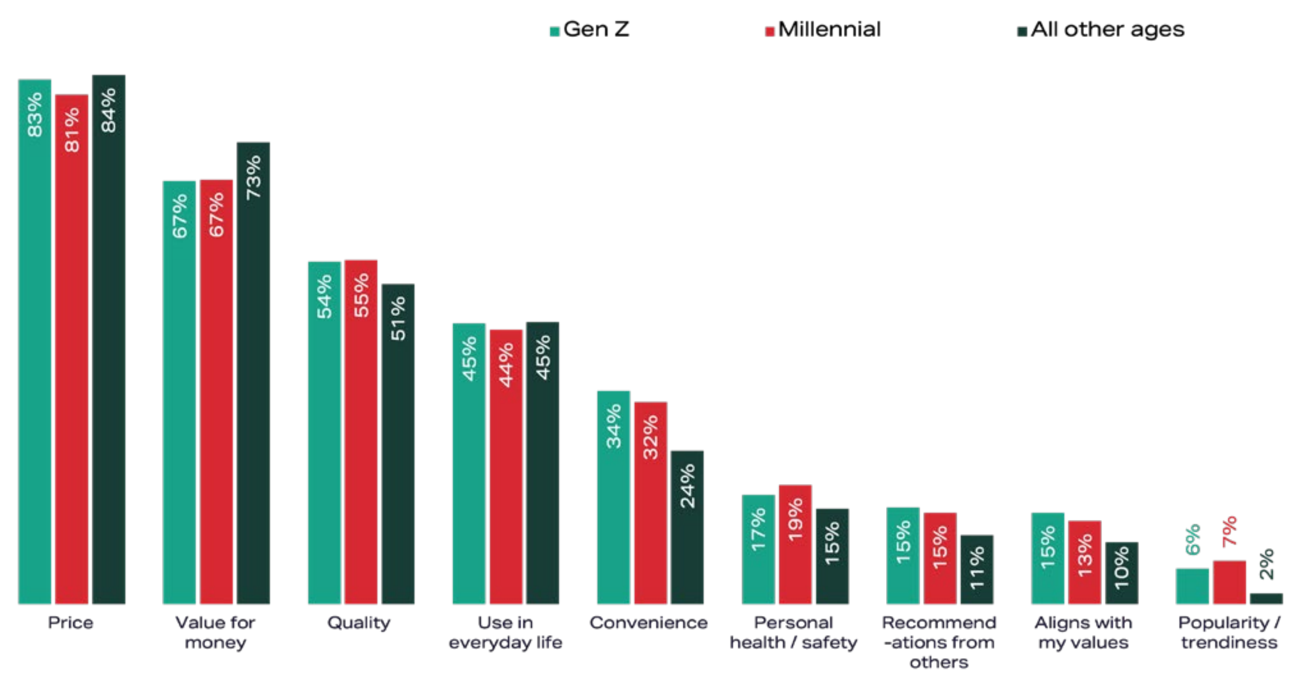
Consumers have spoken with conviction: Price is a critical factor when shopping. But as budgets are tight, consumers will care most about value for money, and some may choose to buy fewer, better-quality products.

Americans across generations agree that price is the most important purchase influencer when making shopping decisions. Marketing communications should focus on product quality to appeal to consumers.

Popularity / trendiness is less of a concern as consumers want to carefully invest in products that will last and are worth the cost.

Most Important Shopping Decision Influencers

% who say the following factors most directly impact their current shopping decisions



Source: GWI x PMG Holiday Study 2023. Base: Among internet users, 182 Gen Z (aged 18-26), 1,320 millennials (aged 27-40) and 1,511 consumers of all other ages (aged 41-99). Market: US.

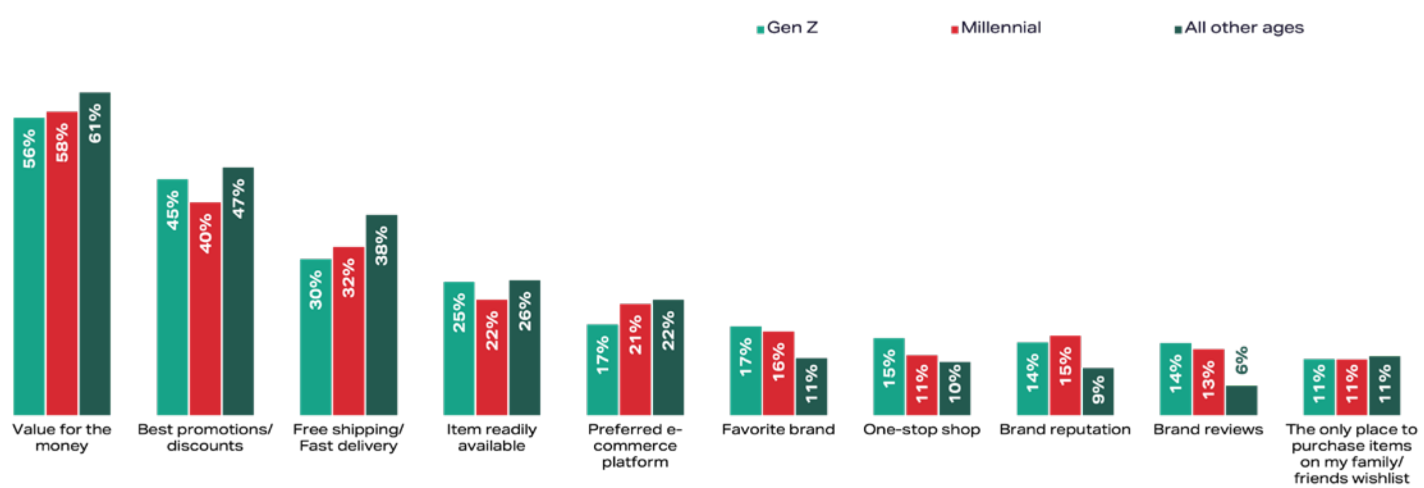
Price & value are critical factors when shopping, while popularity ranks lowest as an influencer of purchase decisions.

QUALITY OVER QUANTITY

This signifies a shift from 'more is more' to a preference for fewer, better purchases. Trends like capsule wardrobes and (not-so) quiet luxury underscore this shift towards thoughtful, value-driven consumption.

Top 3 Shopping Location Influencers

Among those who intend to go holiday shopping this year, % who say the following factors influence where they'll shop for the holidays (select 3)



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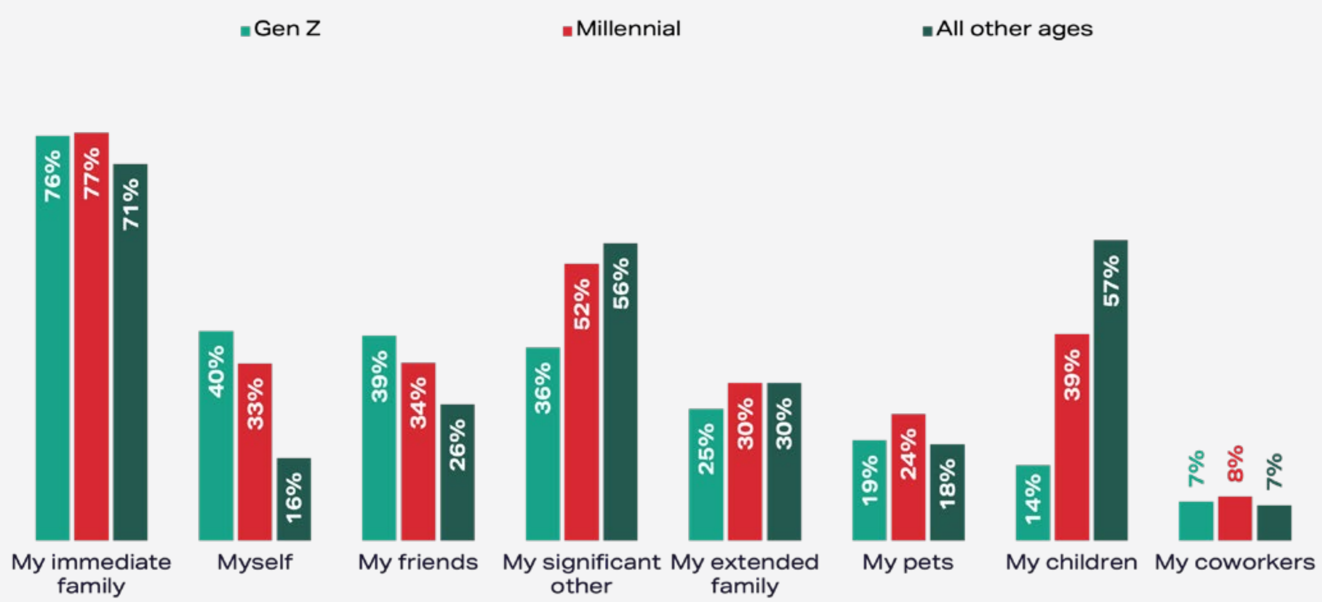
Shopping for Me Is Important to Gen Z

This holiday season, Gen Z adds a unique and unexpected twist to the gifting tradition. They say they'll allocate 40% of their spending for self-gifting. This shift offers marketers the opportunity to engage with Gen Z on self-care and "treat yourself" themes alongside traditional gift shopping.

Who They're Shopping for This Holiday Season

Among those who intend to go holiday shopping this year, % who plan to shop for the following people



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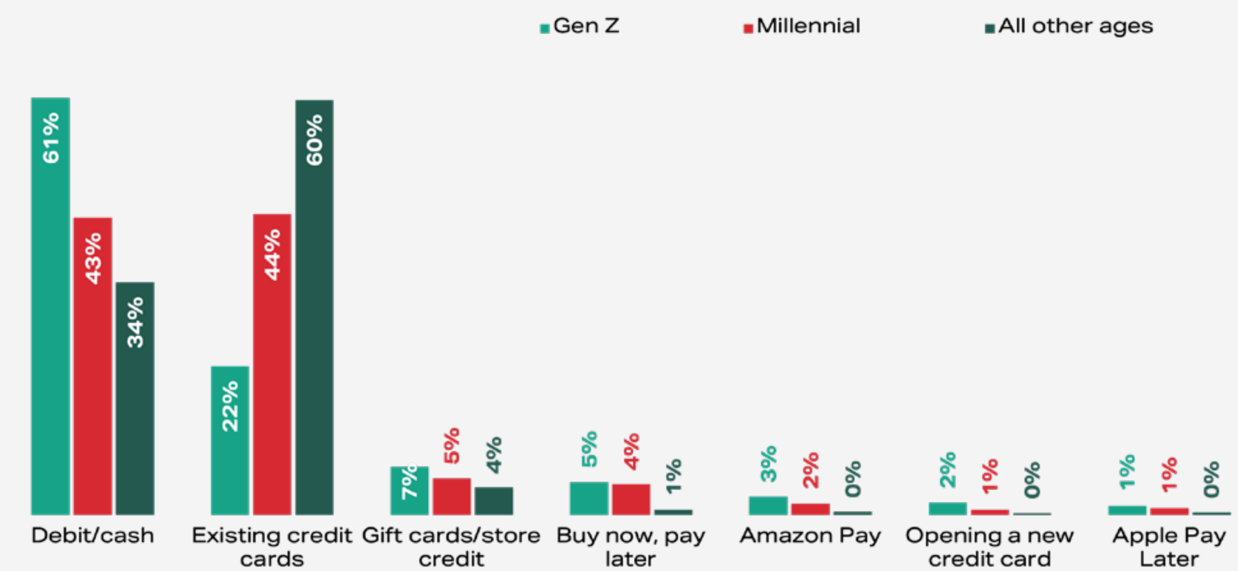
Preferred Payment Methods While Holiday Shopping

Among those who intend to go holiday shopping this year, % who say the following is their preferred form of payment when holiday shopping



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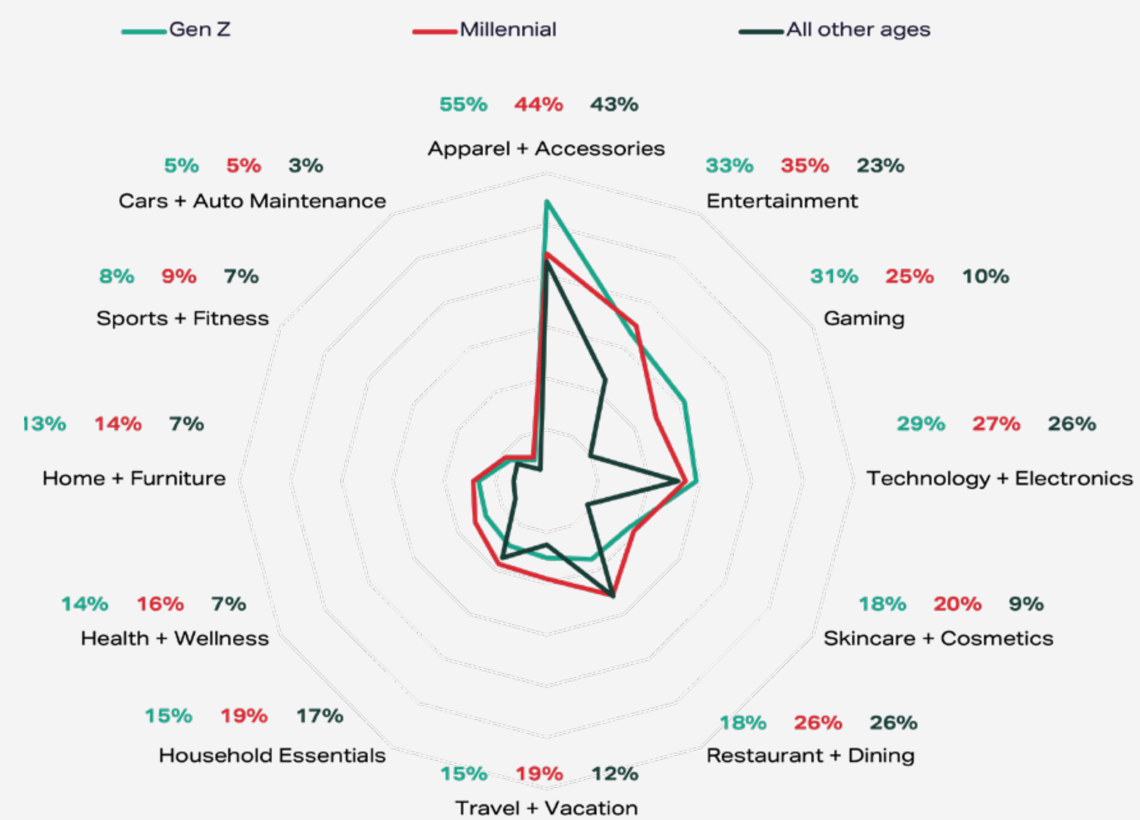
GOOD NEWS FOR RETAIL BRANDS: SHOPPERS HAVE CLOTHES & TECH AT THE TOP OF THEIR LISTS

This year, shoppers are prepared to spend the most on apparel and accessories, especially Gen Z shoppers. Gen Z and millennials are also planning to spend more on gaming, technology, and electronics this year.

Expected Highest Spend Categories

Among those who intend to go holiday shopping this year, % who anticipate spending the most on the following categories



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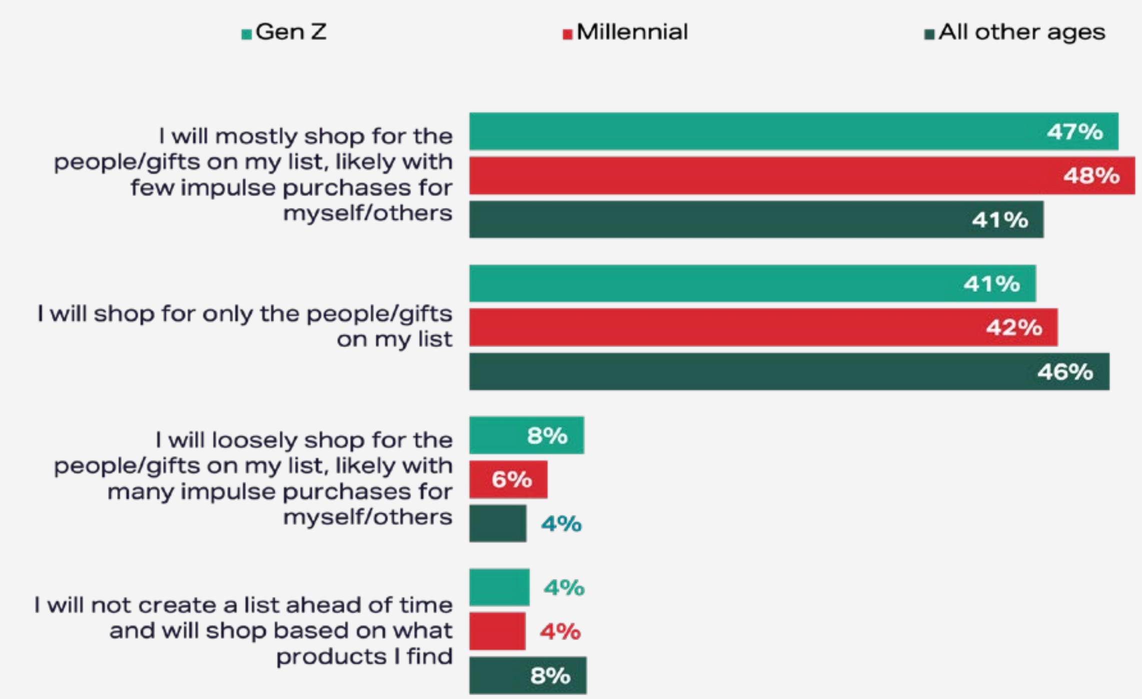
Planned vs Impulse Gift Buying

Among those who intend to go holiday shopping this year, % who say the following applies to them…



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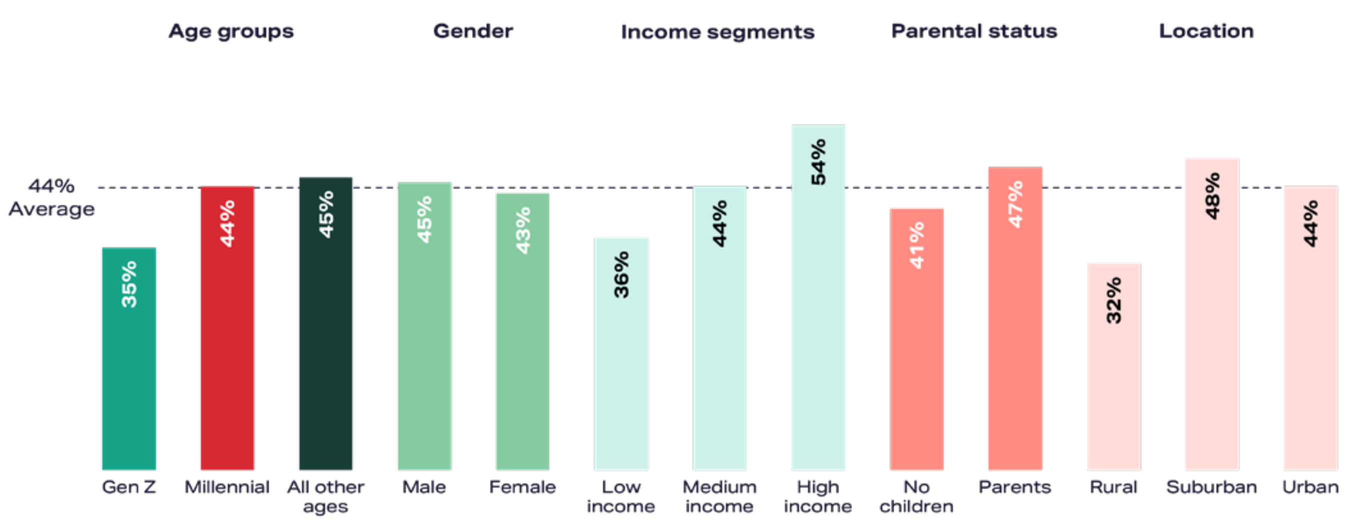
HOLIDAY GIFTING TRENDS

Some consumers are already mentally prepared to return gifts they do not like. At least one-third of consumers across segments say they are comfortable returning gifts they do not like. The most likely to return are high-income earners and parents. Rural, Gen Z, and lower-income consumers are least likely to share this sentiment, though. This is important to keep in mind as holiday shopping may not technically end the day of the holiday for consumers. Some may return or exchange and then spend on something else in the process.

"If given a gift I don't like, I'll likely return or exchange it"

% who agree with the above statement



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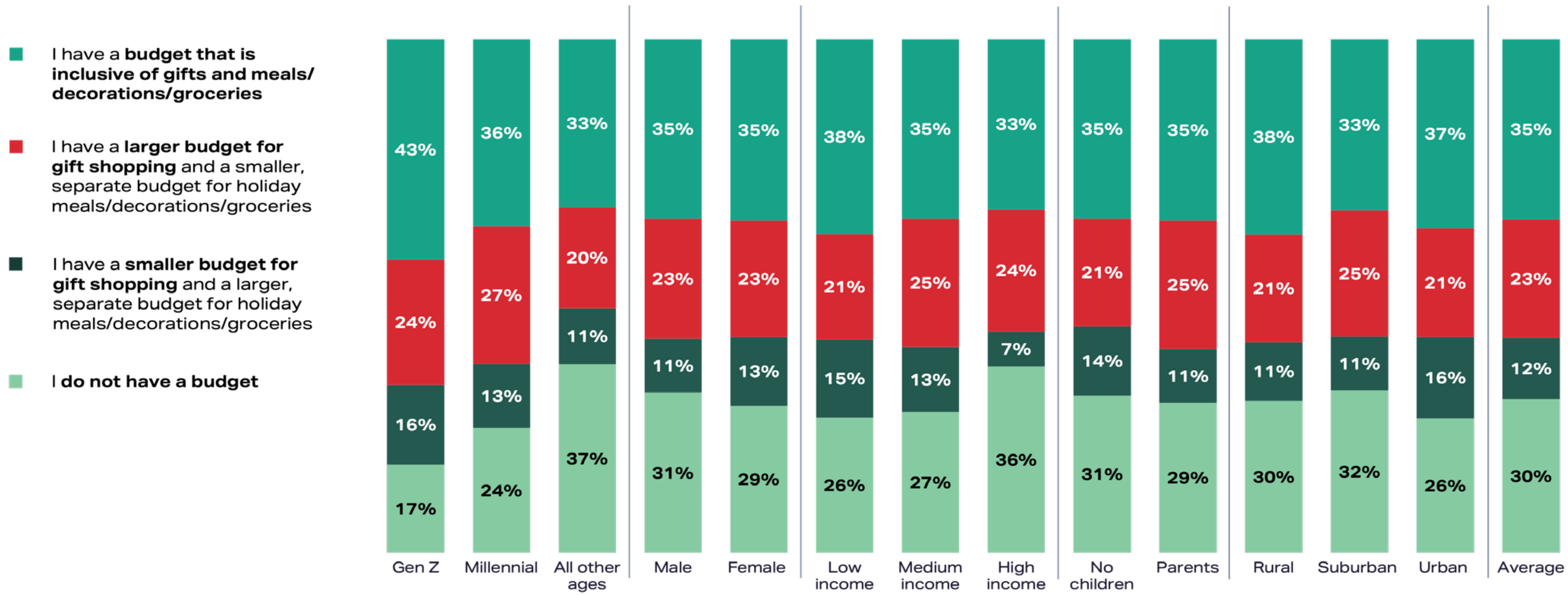
HOLIDAY GIFTING TRENDS

Holiday Shopping Budget

Among those who intend to go holiday shopping this year, % who say the following describes their holiday shopping budget this year



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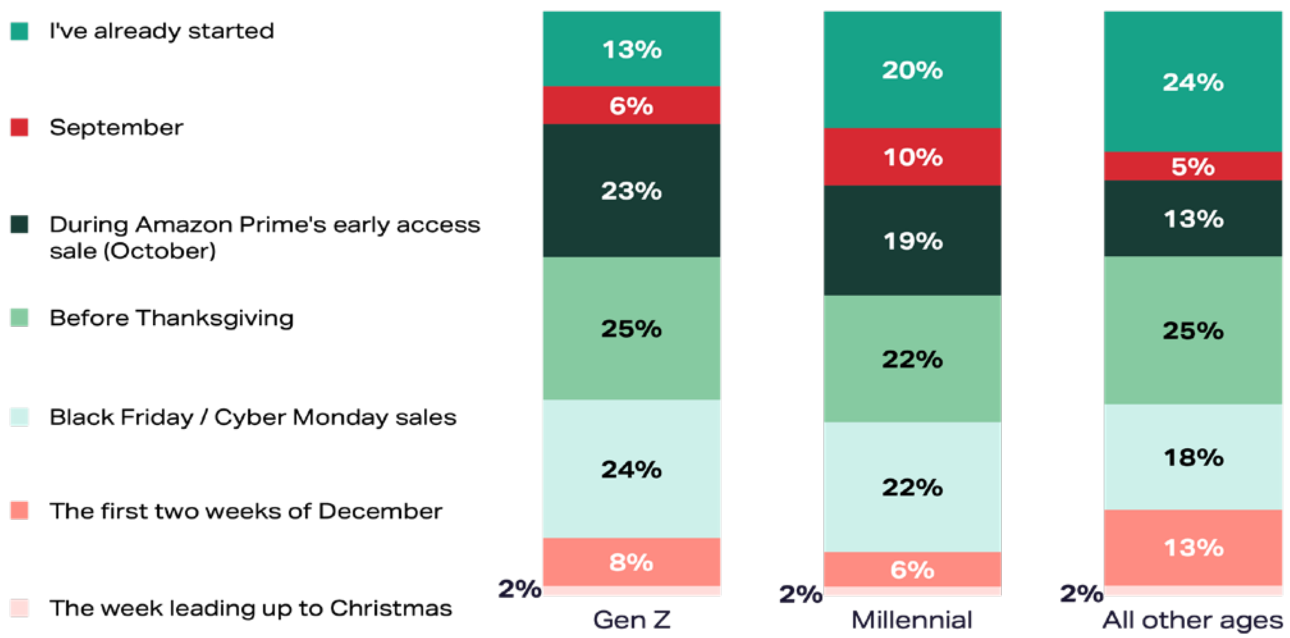
Holiday Shopping & Sales Off to An Early Start

Feel like the holidays kick off earlier and earlier each year? It's not just your imagination. It's evident that that the Amazon Prime Big Deal Days sale in October in October jump-started the holiday shopping countdown. November leading up to Thanksgiving is the golden period for brands to engage with consumers. Nearly half of shoppers commence their holiday purchasing before Thanksgiving, with Black Friday and Cyber Monday sales playing pivotal roles.

Expected Holiday Shopping Start Date

Among those who intend to go holiday shopping this year, % who say they plan to begin holiday shopping…



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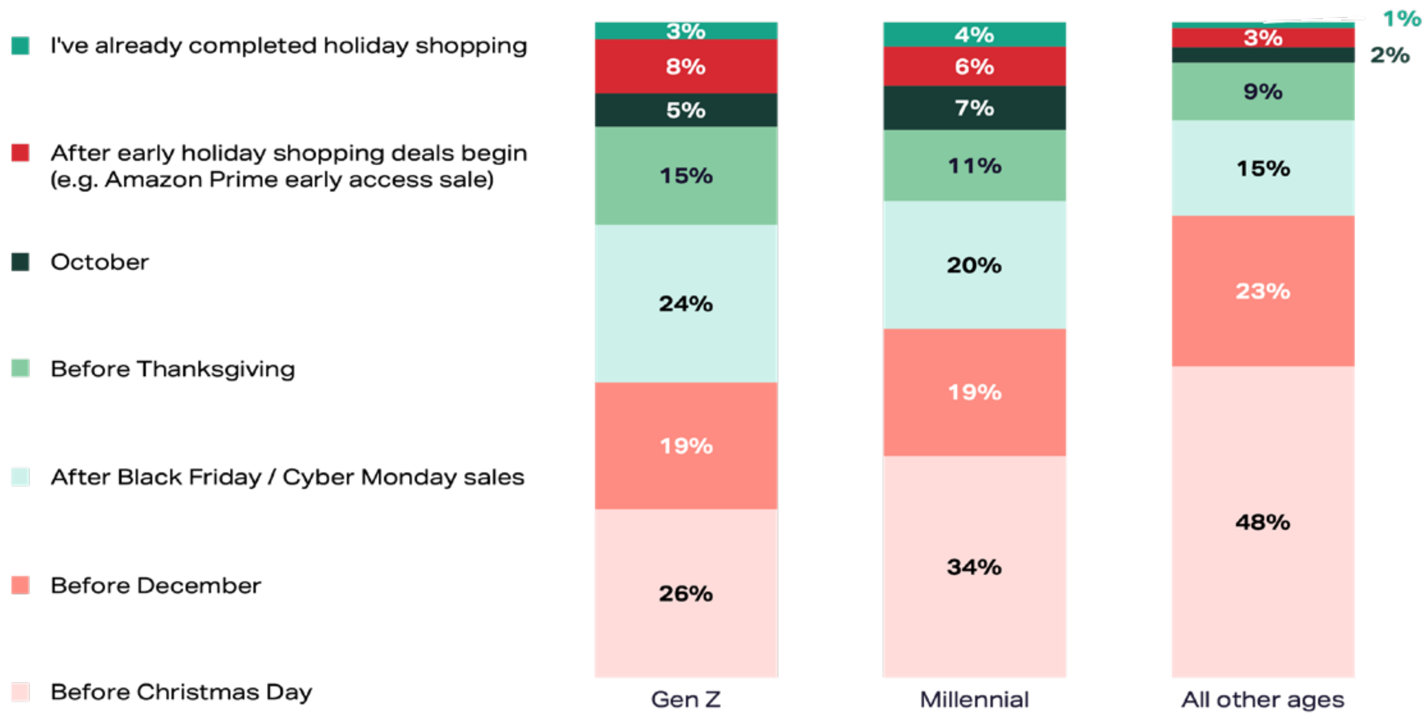
Nearly half of shoppers commence their holiday purchasing before Thanksgiving, with Black Friday and Cyber Monday sales playing pivotal roles.

HOLIDAY SHOPPING PERIOD

Older generations responded that they were more likely to shop until the day before Christmas but also that they'd already started their gift shopping, meaning they are extending their shopping season for the longest duration.

Expected Holiday Shopping End Date

Among those who intend to go holiday shopping this year, % who say they anticipate completing holiday shopping...



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THE HOLIDAY SHOPPING LIST

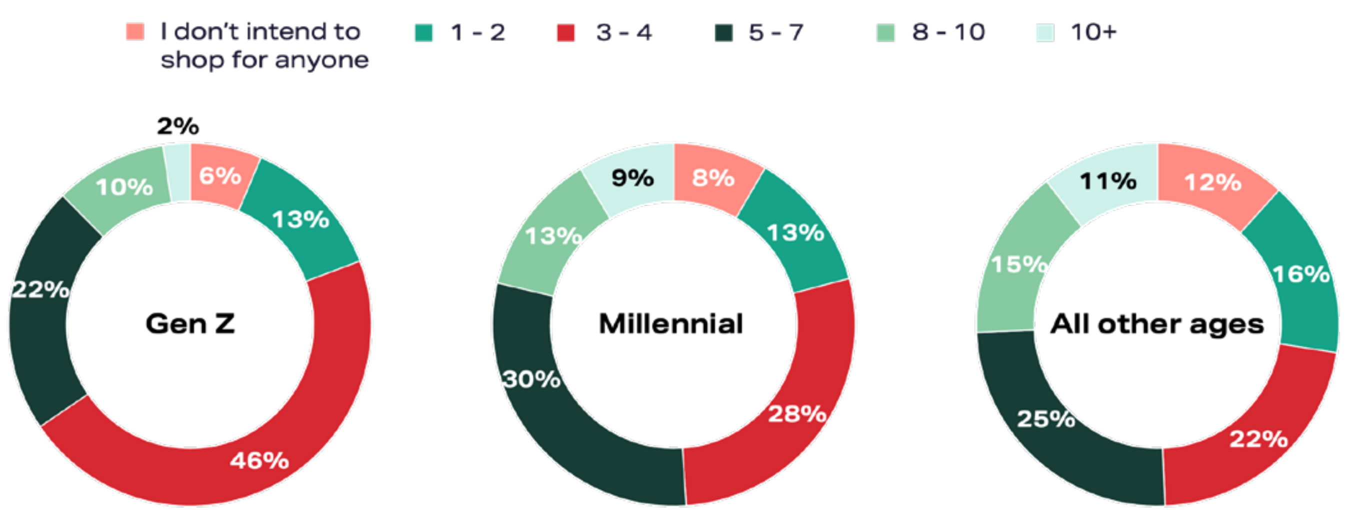
Most consumers plan to shop for 3 to 7 people this holiday season, including themselves, prioritizing gifting over other discretionary purchase decisions. Millennials tend to have the longest gift lists, so larger stores that can act as a one-stop- shop to make their gift-shopping experience easier may be appealing to them.

Similarly, brands will need to differentiate themselves by showcasing how they have the 'perfect gift' for those planning to shop for fewer people. Older groups likely care most about this, given they're most likely to say purchasing the 'perfect' gift is stressful.

Older consumers are more likely than other generations to say they don't intend to shop for anyone this holiday season: 12% say this.

Number of People Intending to Shop for This Holiday Season

% who intend to holiday shop for the following number of people



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12% Twelve percent of older generations do not plan to shop for anyone.

Holiday Sentiment

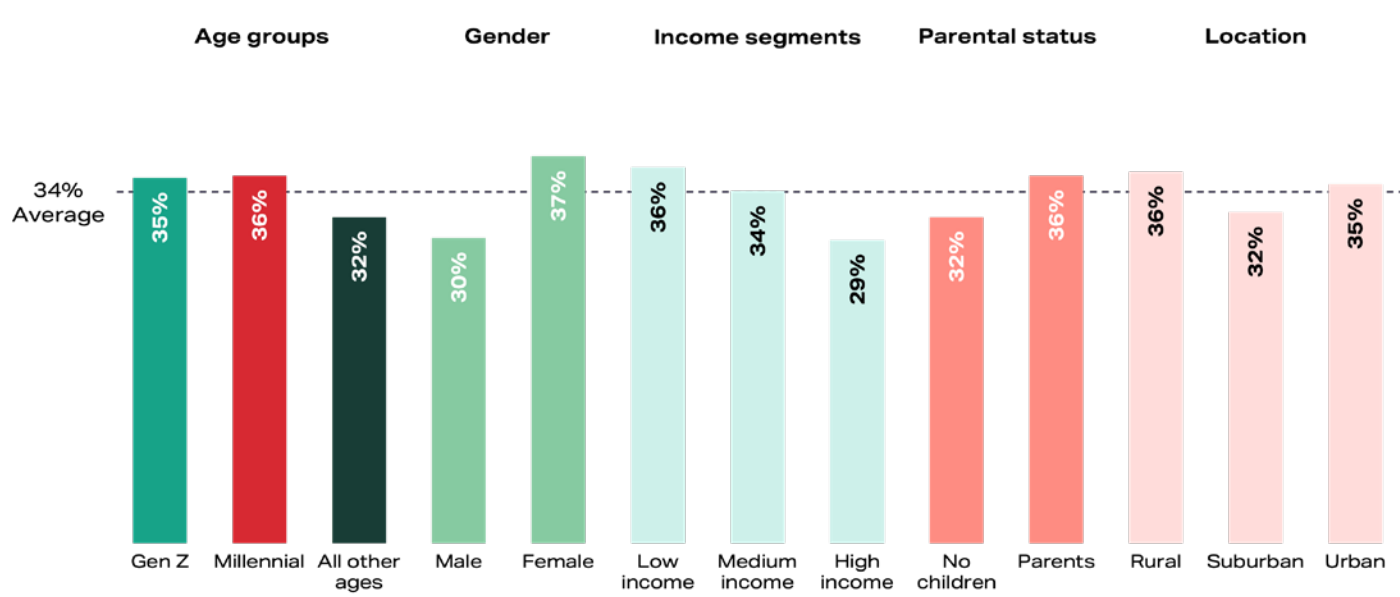
How People Are Feeling Heading into the Holidays

The joy of the holiday season is not devoid of stress. Disparities in holiday stress perceptions emerge across demographic segments. Women, millennials, parents, and lower-income earners report heightened holiday-related stress, exceeding the 34% average. Conversely, high-income earners and men exhibit lower stress levels. Understanding these variations is vital for crafting tailored marketing strategies.

Brands that make the holiday shopping experience as simple and convenient as possible may appeal to consumers and alleviate some of the stress they feel during this time of year.

"The holidays are the most stressful time of the year for me"

% who agree with the above statement



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Decoding Holiday Stressors

Managing finances during the festive season is the biggest cause of stress for every generation, with 48% of millennials stating they are stressed about finances, 45% of Gen Zers, and 47% of older generations saying the same. 44% of millennials state that their stress comes from finding the 'perfect' gift.

Other factors, such as being around family for extended periods and increased workloads, also add to Gen Z's stress. Millennials are the most stressed at the thought of gifts running out of stock, suggesting this group may start shopping earlier. This group is also most likely to worry about holiday travel.

The in-store shopping experience is most stressful for older groups, so stores that make an effort to control or regulate crowds may stand out.

Contributors to Holiday Stress

Among those who say the holidays are stressful, % who say the following are the biggest contributors to holiday stress

	Gen Z*	Millennial	All other ages
Managing **finances when gift shopping**	45%*	48%	47%
Managing **finances when shopping for decor/groceries**	43%*	34%	32%
Purchasing the **'perfect' gifts**	42%*	44%	46%
Being around family for extended time periods	33%*	28%	29%
Navigating **crowded stores**	28%*	30%	37%
Planning **holiday gatherings/events**	26%*	26%	25%
Staying on track with **healthy eating/fitness goals**	23%*	22%	26%
Increased **workload/busy season**	22%*	19%	14%
Purchasing gifts **before they run out of stock**	22%*	23%	20%
Preparing **holiday meals**	18%*	22%	27%
Holiday **travel**	18%*	19%	14%

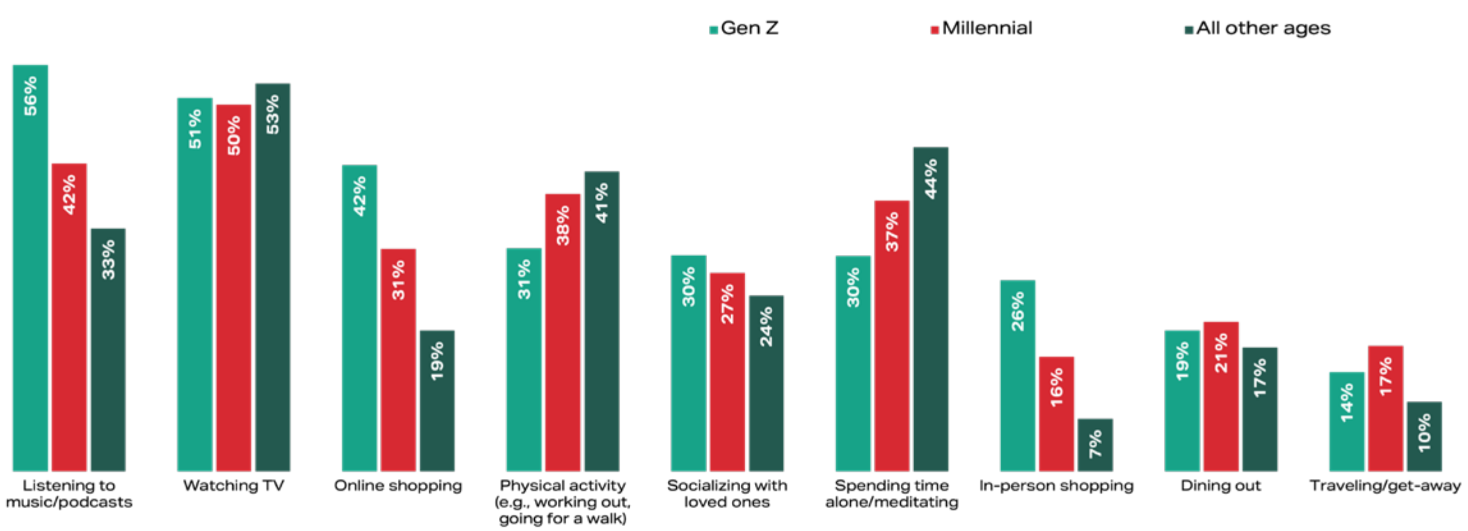
*Sample represents n<100 (n= 66 Gen Z)
Source: GWI x PMG Holiday Study 2023. Base: Among internet users who say the holidays are stressful, 66 Gen Z (aged 18-26)*, 478 millennials (aged 27-40) and 491 consumers of all other ages (aged 41-99). Market: US.

How People Will Spend Their Holiday Downtime

How do people unwind and relieve the holiday stress? Gen Z turns to audio content, with 56% embracing podcasts and music for relaxation. TV, physical activity, meditation, and alone time are key for older groups.

Ways to Relieve Holiday Stress

Among those who say the holidays are stressful, % who do the following to relieve stress during the holidays



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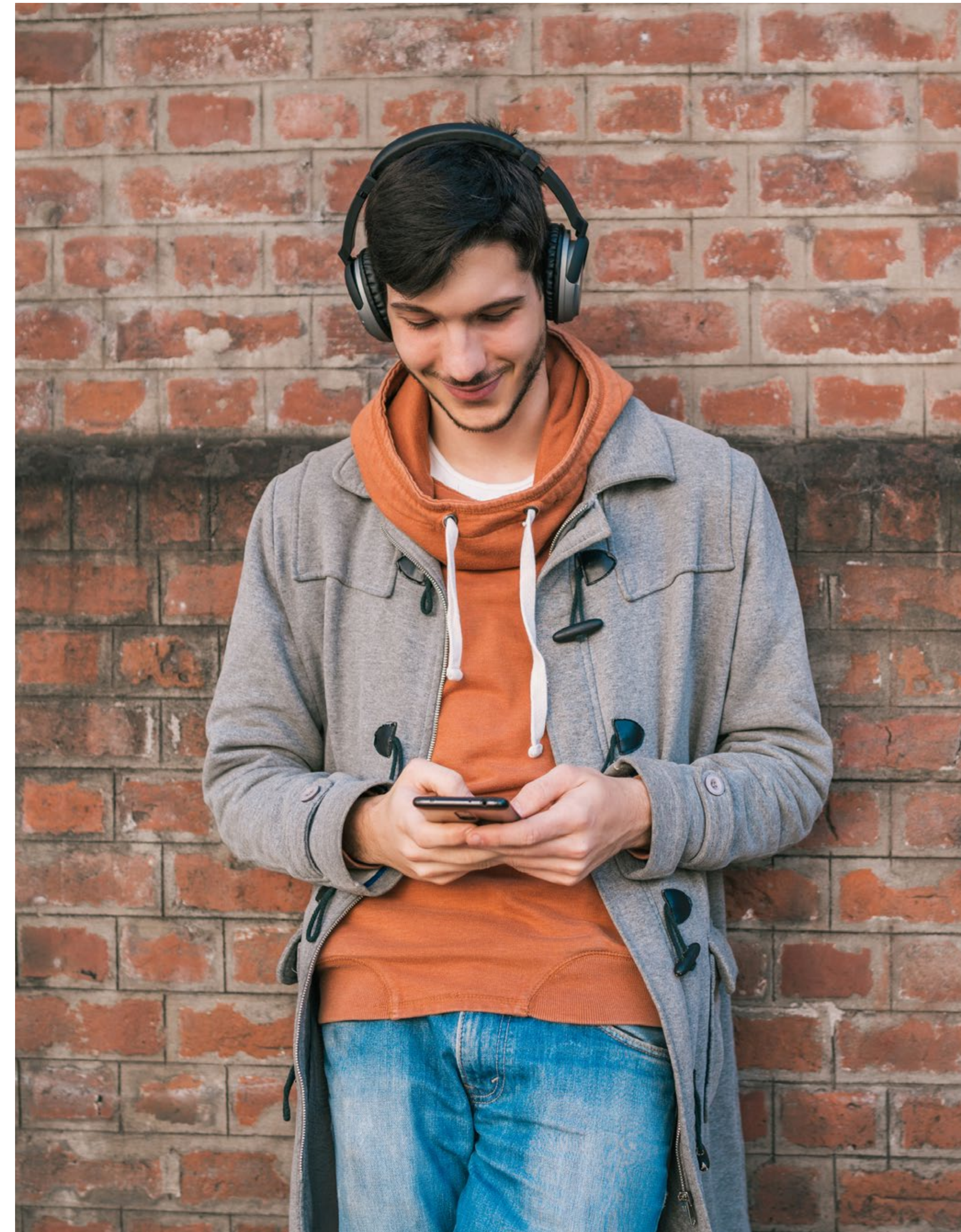


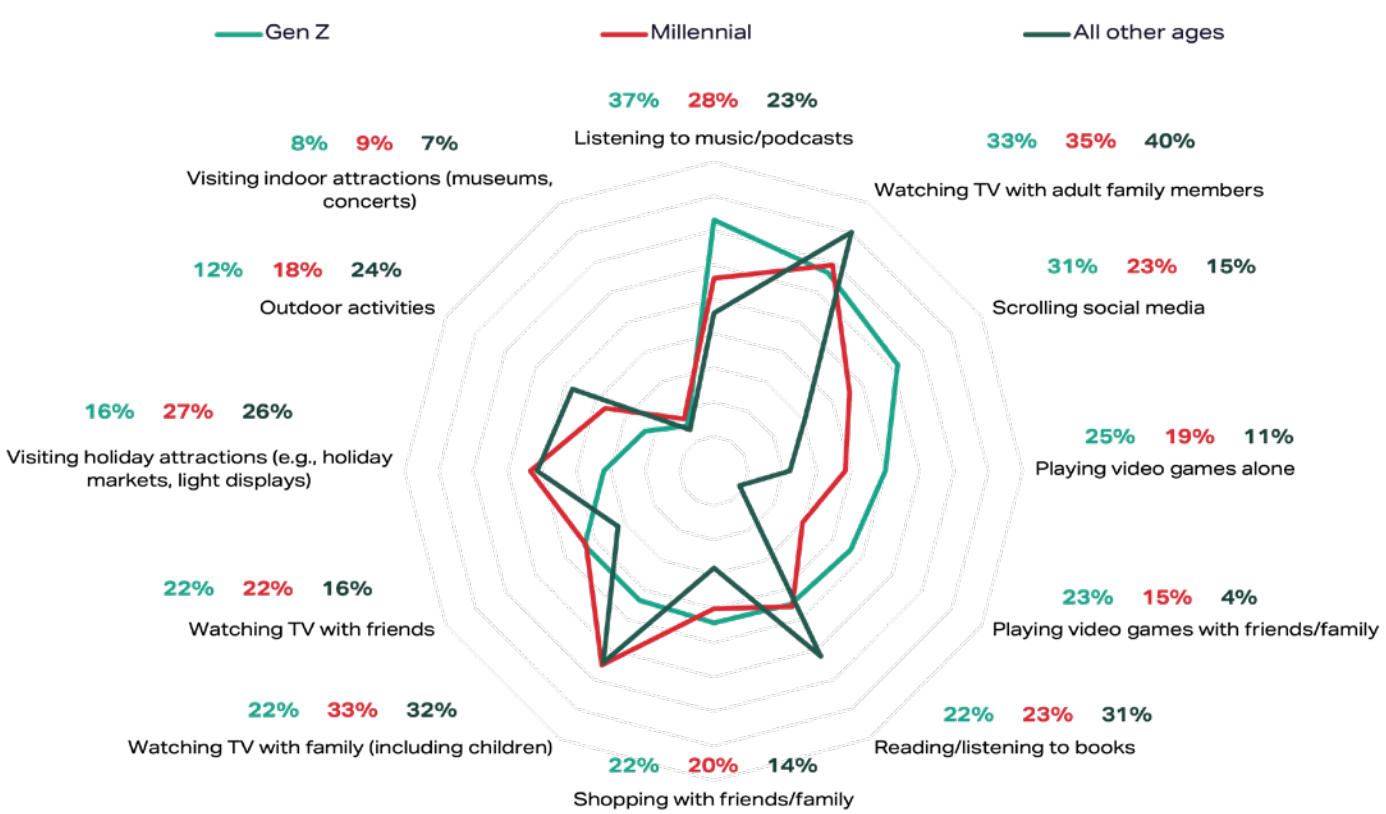
HOW PEOPLE WILL SPEND THEIR HOLIDAY DOWNTIME

Older generations find solace in meditation and physical activity. Notably, in an era when screens are our constant companions, television remains a timeless source of relaxation for all generations.

Gen Z is also ahead for turning online to social media and video games during downtime, indicating ads across these channels could be impactful. One in five Gen Z and millennials say they're likely to spend time shopping during downtime, too.

Downtime Activities During Holidays

% who say they're likely to do the following during holiday downtime (select three)



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Gen Z turns to audio content, with 56% embracing podcasts and music for relaxation.

Holiday Travel Plans

Home for the Holidays

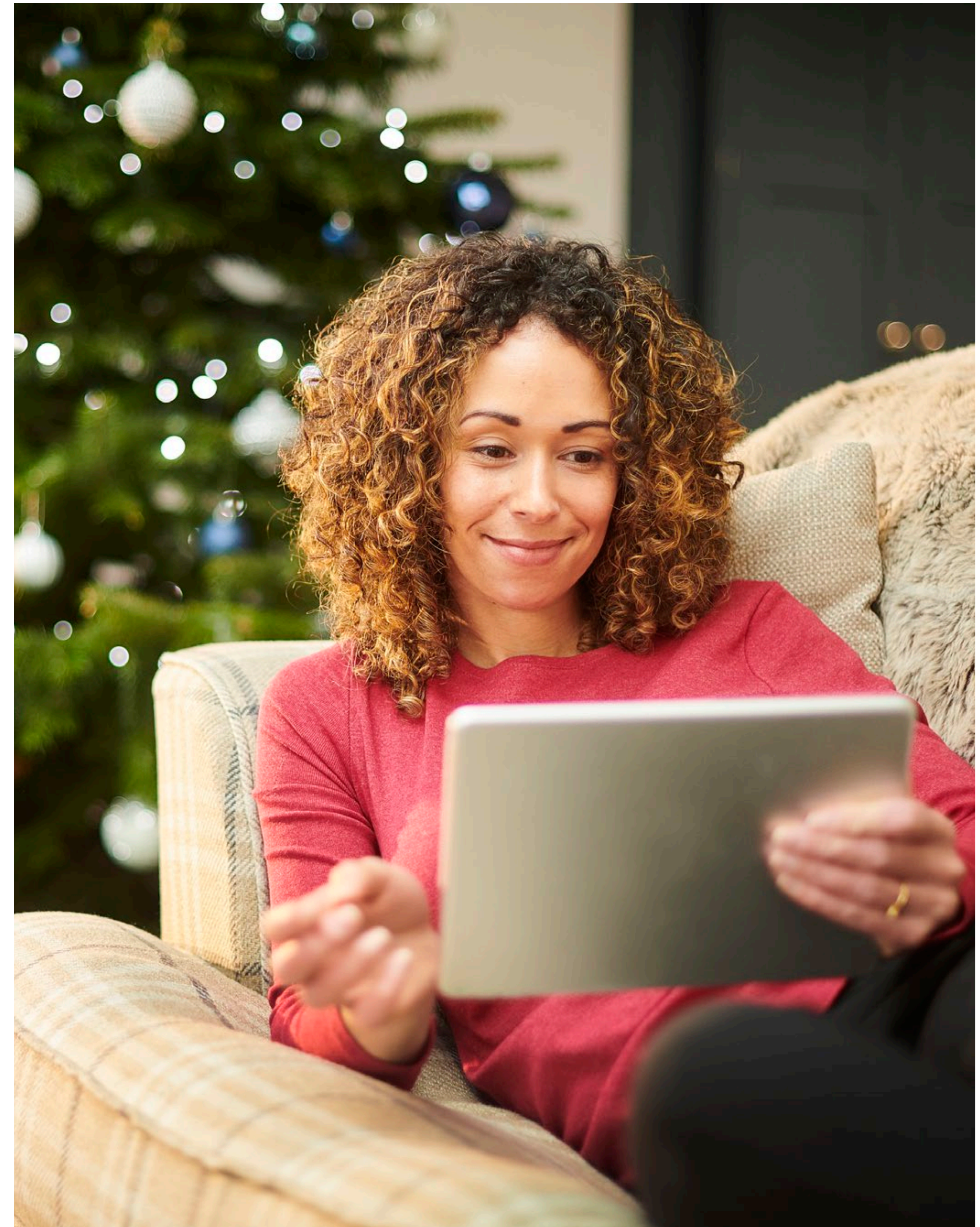
High-income and urban consumers stand out compared to other segments for being most likely to travel this holiday season, which hints at potential last-minute travel bookings through November and December.

Holiday Travel Plans

% who say the following about their plans to travel this holiday season

		Yes	No	Not sure
Age groups	Gen Z	25%	52%	23%
	Millennial	27%	52%	21%
	All other ages	20%	57%	23%
Gender	Male	27%	51%	23%
	Female	20%	59%	21%
Income	Low income	13%	67%	20%
	Medium income	26%	52%	22%
	High income	34%	42%	24%
Parental status	No children	22%	55%	23%
	Parents	25%	54%	21%
Location	Rural	20%	57%	24%
	Suburban	22%	56%	22%
	Urban	29%	50%	21%

Source: GWI x PMG Holiday Study 2023. Base: Among internet users, 182 Gen Z (aged 18-26), 1,320 millennials (aged 27-40), 1,511 consumers of all other ages (aged 41-99), 1,149 males, 1,864 females, 1,005 low income, 1,057 medium income, 866 high income, 1,430 without children, 1,583 parents, 649 rural, 1,640 suburban and 724 urban internet users. Market: US.

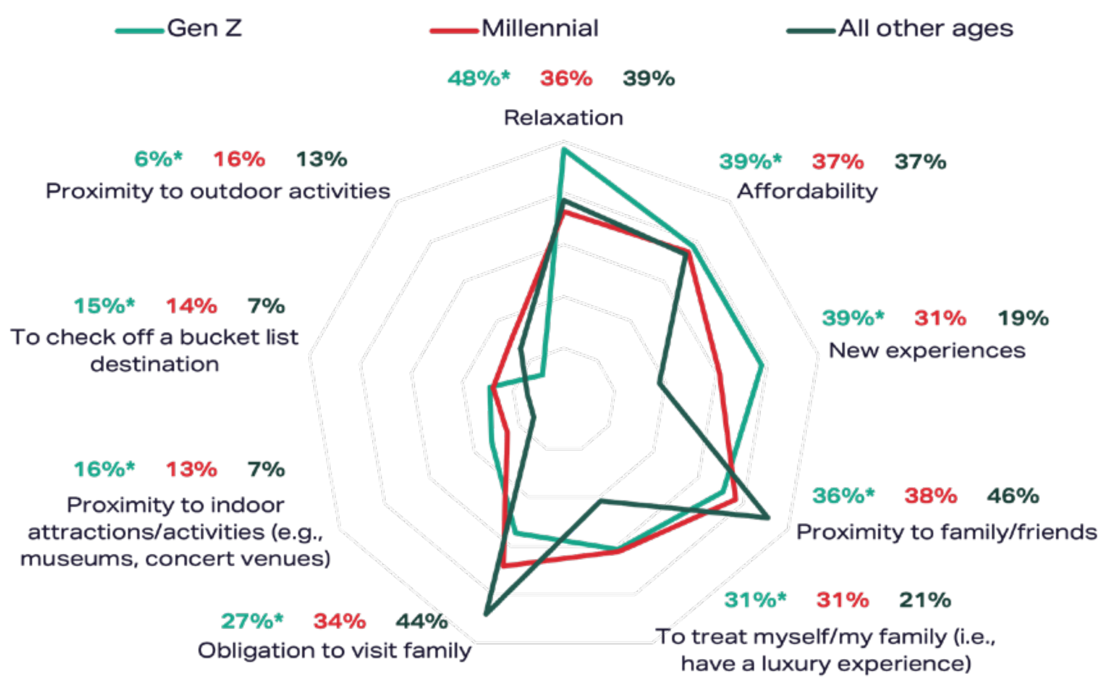


The Holiday Travelers

Relaxation, affordability, and new experiences are at the forefront of holiday travel influencers for Gen Z. Other age groups are thinking more about travel to visit family, with proximity to visit family being their top holiday travel influencer.

Factors Influencing Where to Travel for the Holidays

Among those who plan to travel around the holidays, % who say the following are important factors when deciding where to travel for the holidays



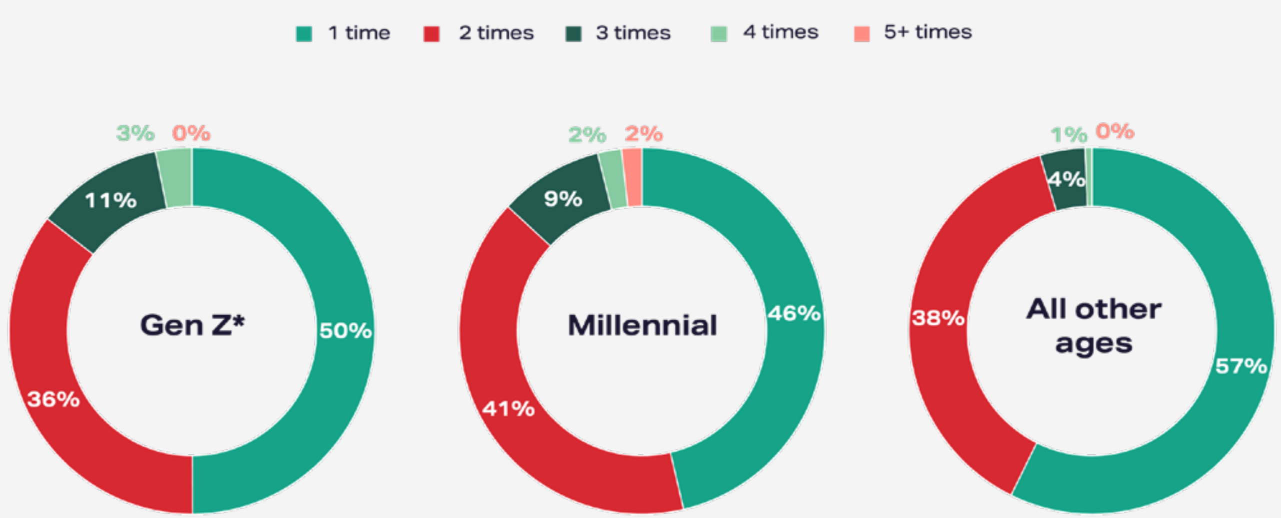
*Sample represents n<100 (n= 47 Gen Z)
Source: GWI x PMG Holiday Study 2023. Base: Among internet users who plan to travel around the holidays, 47 Gen Z* (aged 18-26), 344 millennials (aged 27-40) and 279 consumers of all other ages (aged 41-99). Market: US.

Gen Z Eager for New Experiences This Holiday Season

Gen Z stands at the forefront of change, exhibiting a willingness for spontaneity and new experiences. They are the most likely generation to increase holiday travel spending, and their diverse travel plans mirror their 'go-with-the-flow' approach. Gen Z and urban consumers are most likely to say they'll spend more and travel further this holiday season compared to 2022

Number of Holiday Travel Occasions

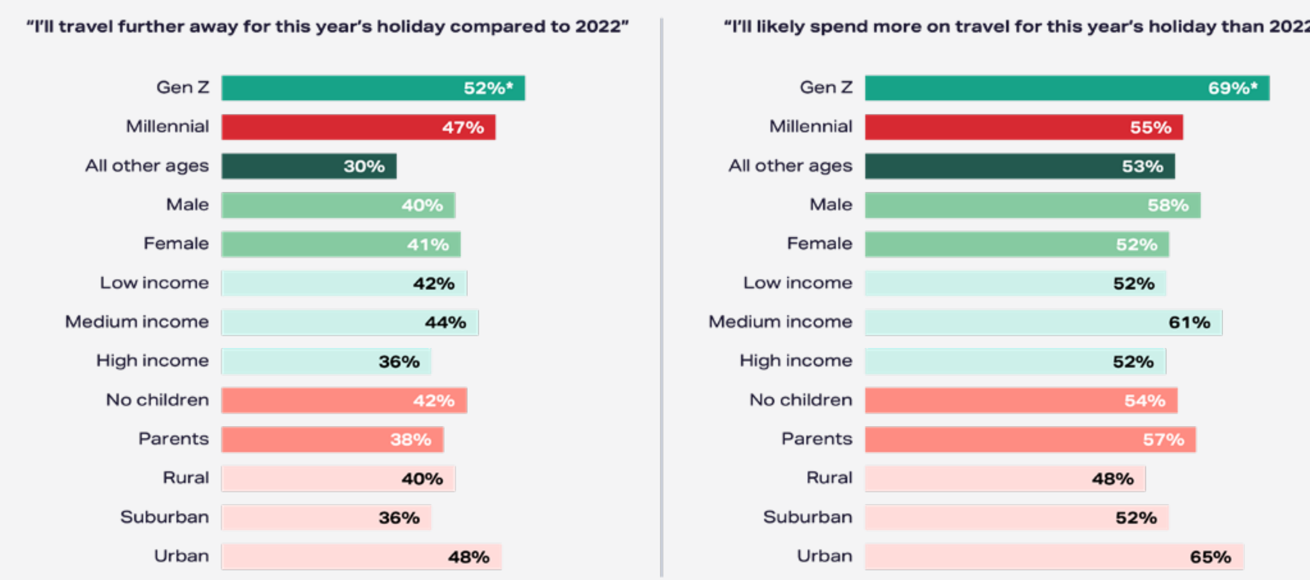
Among those who plan to travel around the holidays, % who plan to travel the following number of times



*Sample represents n<100 (n= 47 Gen Z)
Source: GWI x PMG Holiday Study 2023. Base: Among internet users who plan to travel around the holidays, 47 Gen Z* (aged 18-26), 344 millennials (aged 27-40) and 279 consumers of all other ages (aged 41-99). Market: US.

Travel Attitudes

Among those who plan to travel around the holidays, % who agree with the following statements

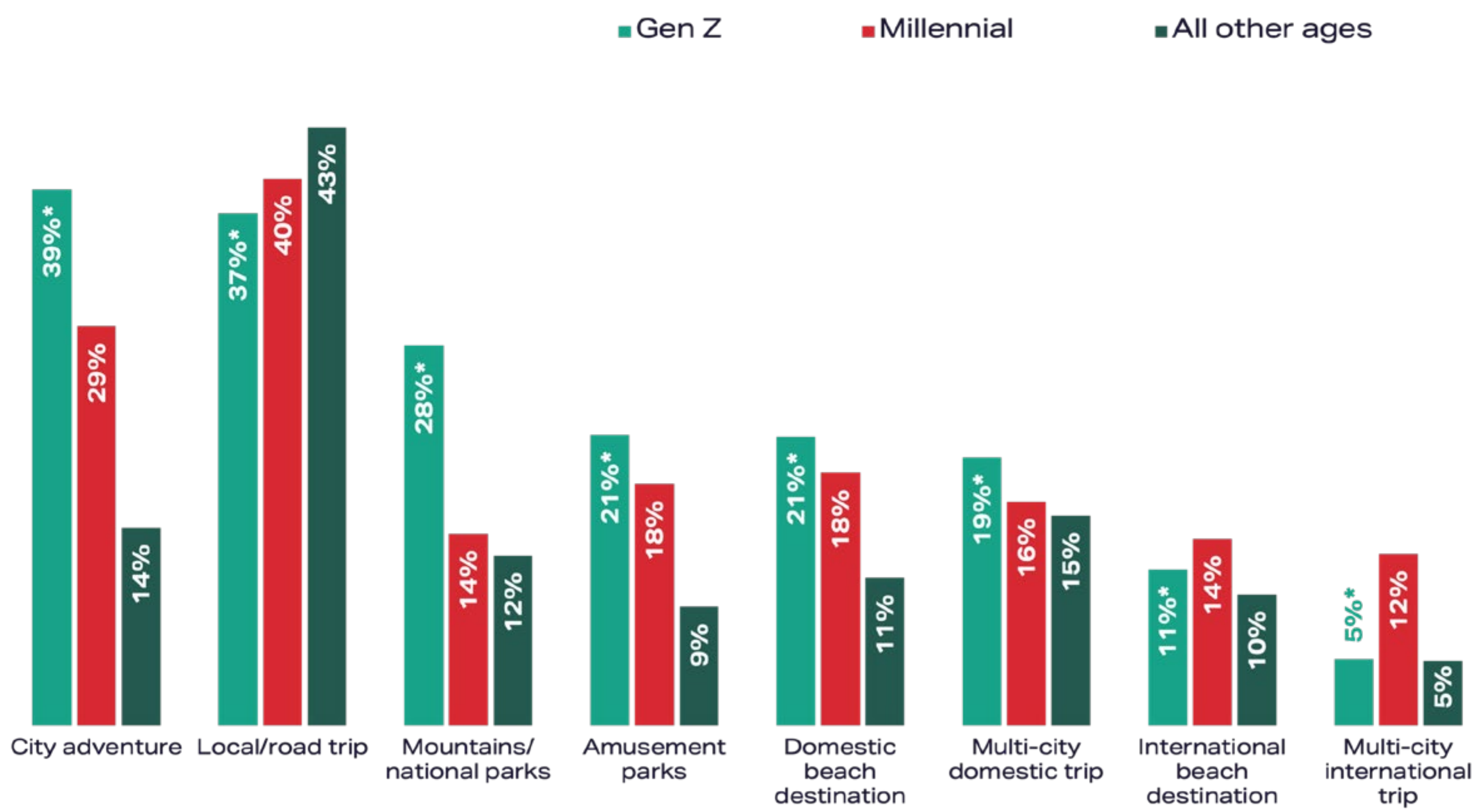


*Sample represents n<100 (n= 47 Gen Z)
Source: GWI x PMG Holiday Study 2023. Base: Among internet users who plan to travel around the holidays, 47 Gen Z* (aged 18-26), 344 millennials (aged 27-40), 279 consumers of all other ages (aged 41-99), 295 males, 375 females, 128 low income, 254 medium income, 279 high income, 303 without children, 367 parents, 120 rural, 354 suburban and 196 urban internet users. Market: US.

GEN Z EAGER FOR NEW EXPERIENCES

Travel Destinations

Among those who plan to travel around the holidays, % who say they'll take the following types of trips during the holidays

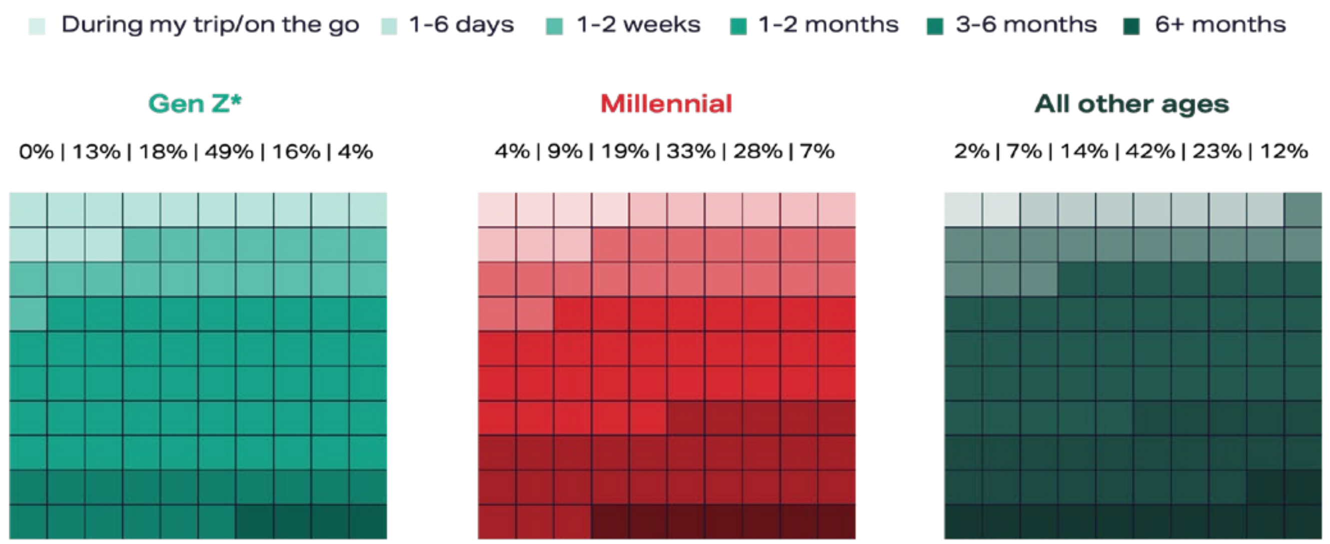


*Sample represents n<100 (n= 47 Gen Z)
Source: GWI x PMG Holiday Study 2023. Base: Among internet users who plan to travel around the holidays, 47 Gen Z* (aged 18-26), 344 millennials (aged 27-40) and 279 consumers of all other ages (aged 41-99). Market: US.

GEN Z EAGER FOR NEW EXPERIENCES

Travel Planning Timeframe

Among those who plan to travel around the holidays, % who say the following is how far in advance they plan their holiday travel…



*Sample represents n<100 (n= 47 Gen Z)
Source: GWI x PMG Holiday Study 2023. Base: Among internet users who plan to travel around the holidays, 47 Gen Z* (aged 18-26), 344 millennials (aged 27-40) and 279 consumers of all other ages (aged 41-99). Market: US.

Gen Z stands at the forefront of change, exhibiting a willingness for spontaneity and new experiences.

Opportunities for Leading Brands Through Holiday & Beyond

The 2023 holiday season presents a unique landscape for brands and marketers. Insights into Gen Z's unwavering optimism, shifting spending patterns, the prominence of value, and holiday stress perceptions are essential. Understanding relaxation preferences and media consumption habits are key to reaching people with the right message at the right time during peak holiday moments.

Campaigns across digital and social channels will be effective in reaching consumers of all ages as they gear up for an extended holiday and gift-shopping season. With purchase consideration, discretionary spending, and brand loyalty at record lows, it's more important than ever for brands to meet consumers where they are and seek opportunities to provide added value and drive long-term loyalty throughout the buying experience.

Creating seamless brand experiences that connect with consumers should be essential to any brand's marketing strategy as we close out 2023.

Campaigns across digital and social channels will be effective in reaching consumers of all ages as they gear up for an extended holiday and gift-shopping season.

ABOUT THIS REPORT

Methodology

PMG's 2023 Holiday Shopper Insights Survey with GlobalWebIndex

This survey was written in collaboration with GWI and was then distributed by a panel in an online format, to 3,013 respondents in the U.S. The survey was fielded from September 7, 2023 to September 21, 2023.

Fieldwork Dates
Start: September 7, 2023
Finish: September 21, 2023

Audience
Total: **3,013** internet users aged 18+
182 Gen Z respondents (18-26)
1,320 Millennial respondents (27-40)
1,511 Respondents age 41+

Market: U.S.

About PMG
PMG is a global independent digital company that seeks to inspire people and brands that anything is possible. Driven by shared success, PMG uses business strategy and transformation, creative, media, and insights, along with our proprietary marketing intelligence platform Alli, to deliver Digital Made for Humans™. With offices in New York, London, Dallas/Fort Worth, Austin, Atlanta and Cleveland, our team is made up of over 700 employees globally, and our work for brands like Beats by Dre, Best Western Hotels & Resorts, Gap Inc., Kohler, Momentive, Nike, Sephora, and Shake Shack has received top industry recognitions including Cannes Lions and Adweek Media Plan of the Year.

Named to Ad Age's 2023 A-List, MediaPost's 2020 & 2022 Independent Agency of the Year, and Adweek's 2021 Breakthrough Media Agency of the Year, PMG has grown through commitments to continuous improvement, business integrity, and cultivating dynamic relationships. We are proud to be named among Fast Company's Best Workplaces for Innovators, Fortune's Best Workplaces for Women, and to be the only company named to Ad Age's Best Places to Work eight years in a row.

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