

# Holiday Expectations Survey Research

Survey Research Results



Sitecore conducted survey research among consumers ahead of the 2022 holiday season.

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## About the survey

- 2,156 UK residents completed a 10-minute survey
- Survey was conducted Aug 25-29th, 2022
- Quotas were set to balance participants by age and gender
  
- Participants were recruited from an actively managed online panel
- Participants were incented using rewards points offered by their online panel
  
- Additional results can be found at <https://portal.Advanis.net/sc>
- The survey was conducted in five countries (UK, US, France, Germany, Australia)



Advanis is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. This research was sponsored by Sitecore and conducted by Advanis. For information about data collection, please contact *Lori Reiser, CAIP* ([lori\\_reiser@advanis.net](mailto:lori_reiser@advanis.net) 519.340.0125)



## Affordability is a key concern for Christmas this year

1 in 3 UK shoppers expecting to spend less this year compared to 2021

61% indicate that a policy for frozen and/or capped energy prices would best help them to afford Christmas this year



## Online shopping will dominate Christmas shopping

The top 3 reasons: shopping online is quick and easy (61%), the online experience is convenient (58%), they want to avoid crowds (51%). 8 of 10 of shoppers indicate that a top priority for purchasing from online brands this Christmas season is early discounts and deals.



## Less than half plan to shop Black Friday

Just under 4 in 10 UK shoppers said that they shopped on Black Friday last year with a slightly higher number planning to do so this year (48%). Nearly all the Black Friday shopping is expected to be online (73%).



## Free shipping a powerful incentive

For most, £9 represents a firm maximum shipping cost.

Free shipping is as powerful an incentive as a significant cash discount on sale items.

For those with high income (over £100k) 41% say they will pay an additional fee faster guaranteed shipping for the majority of their gifts.

# 60%

of workers have done Christmas shopping during the workday with



# 40%

of those opening a secret browser to do so



# 42%

of parents: very likely to buy gifts for kids only



# 40%

of Gen Z will regift a present to save on costs



Despite eased restrictions on in-person shopping, online shopping continues to dominate with only **22%** planning to shop in store more than online



For a significant number, especially men, alcohol is a mandatory part of the Christmas experience. This is equally true across all age groups.



# Affordability

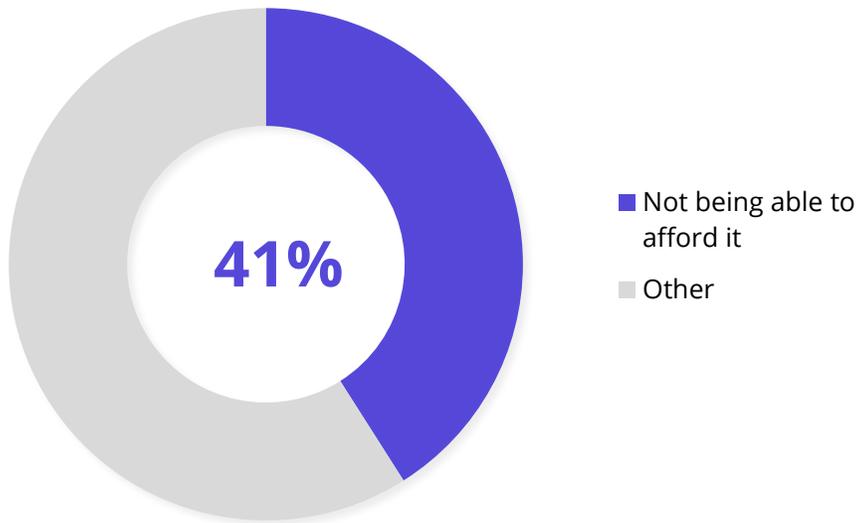


# Affordability is a top concern

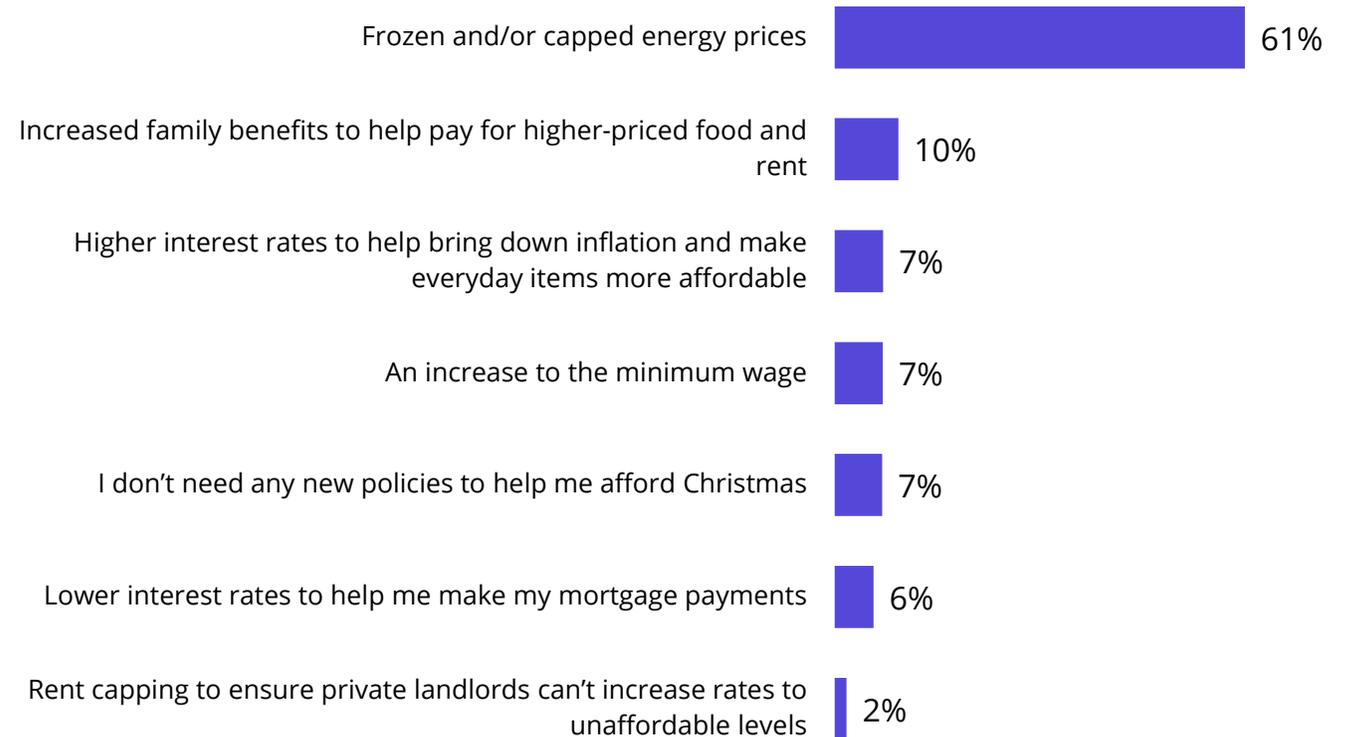
When asked what might ruin their Christmas, affordability was the number one concern, particularly for households with less than £100k income. Energy prices are top-of-mind concerns in terms of government action to make Christmas affordable this year.

(But those with higher income say that fights with family are their top concern!)

## What is most likely to ruin your Christmas



## Policies to help afford Christmas

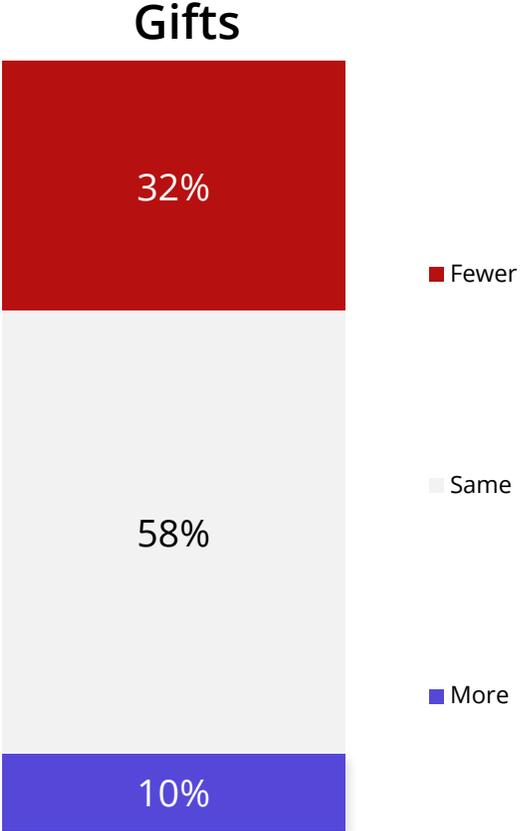
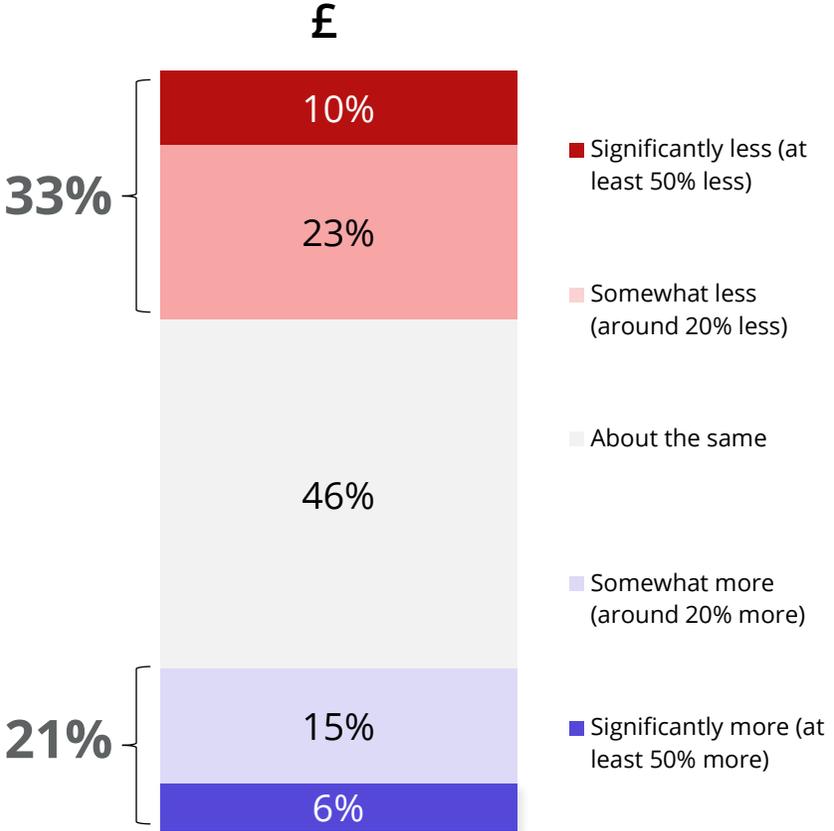


q37uk - What is most likely to ruin your Christmas? Base: UK (2,156)

q38uk - What policy would you most like to see rapidly implemented to best help you afford Christmas this year? Base: UK (2,156)

# Planned Spending & Number of Gifts

1 in 3 UK shoppers expect to spend less this year compared to the 2021 holidays, both in overall amount and in the number of gifts.



Those with £100k or higher income are planning to spend more this year:

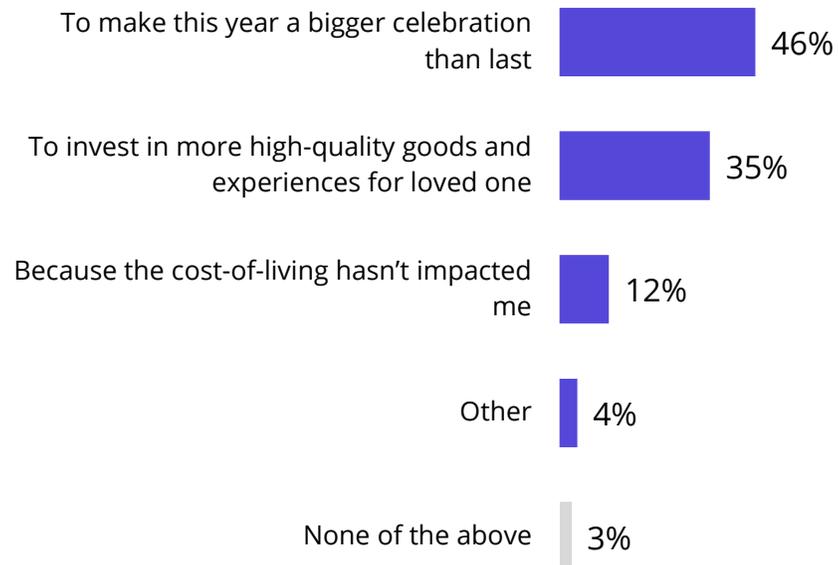
- 45% will spend more
- 29% will buy more gifts

q7t - How will your holiday spending this year compare to the 2021 holidays? Base: UK (2,156)  
q29 - Do you plan to buy more, fewer or the same number of gifts this year compared to last year? Base: UK (2,156)  
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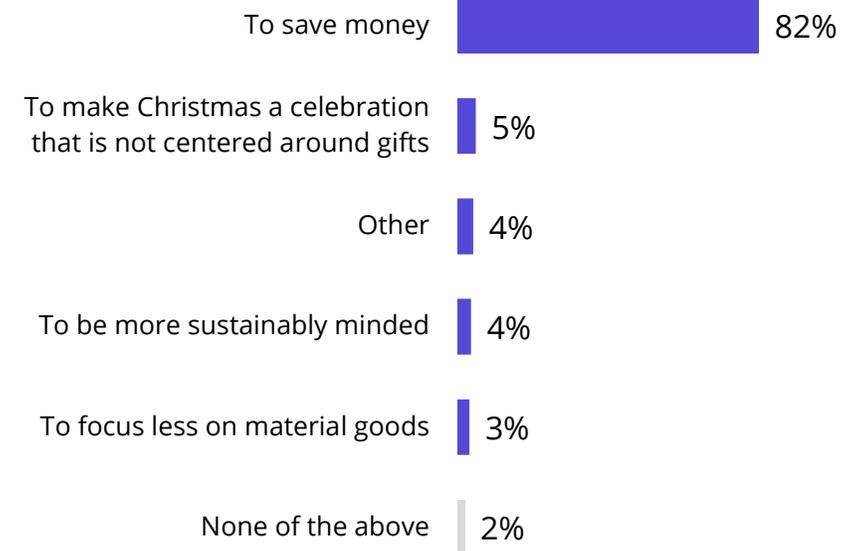
# Why change spending this Christmas?

Saving money is the most common reason to purchase fewer gifts, while those spending more want to make it a bigger celebration and want to invest in higher quality gifts.

## Spending More (21%)



## Spending Less (33%)



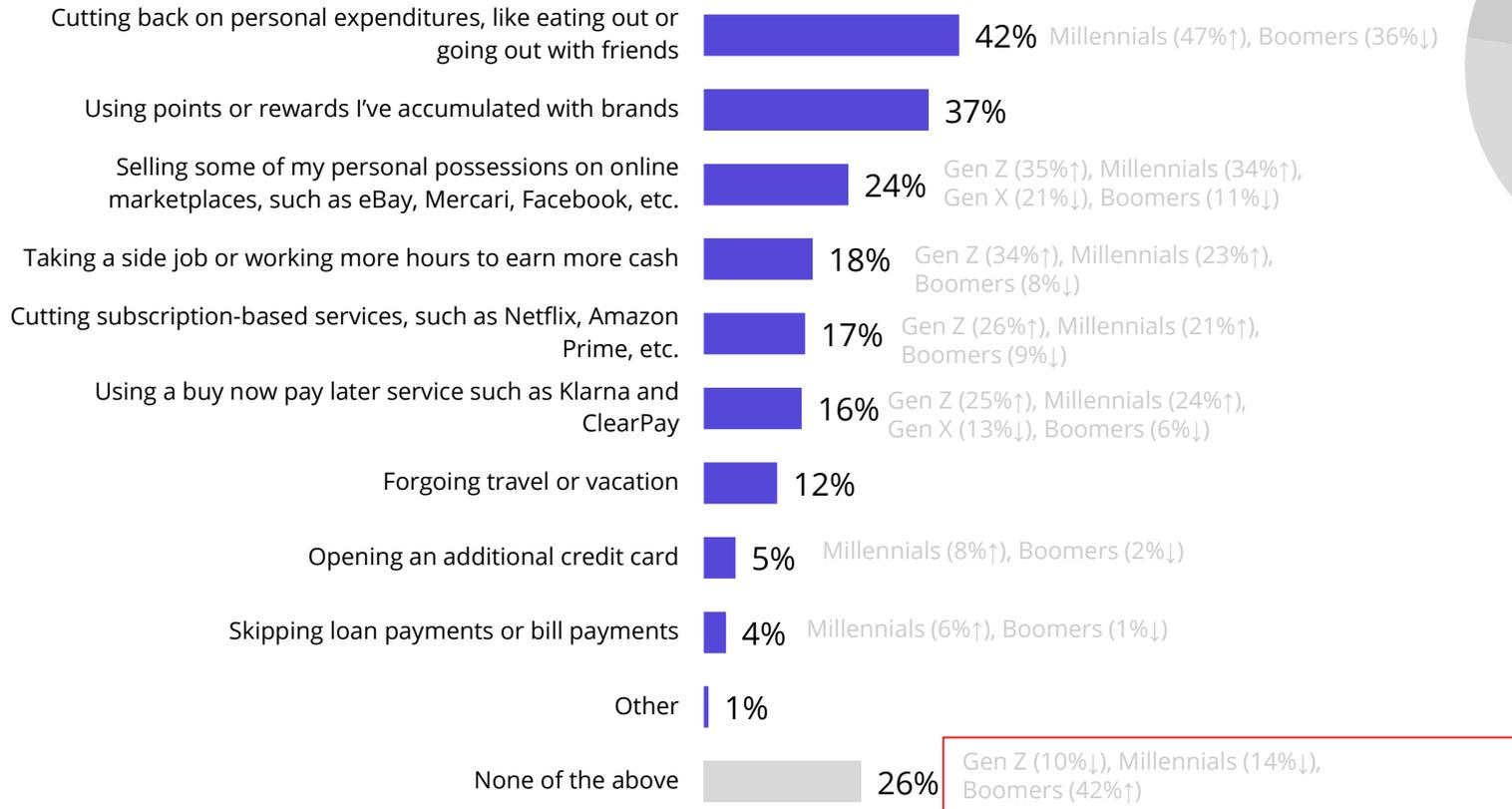
q29a - If fewer, what is the main reason? Base: UK (698)

q29b - If more, what is the main reason? Base: UK (215)

# Ways to Afford Christmas

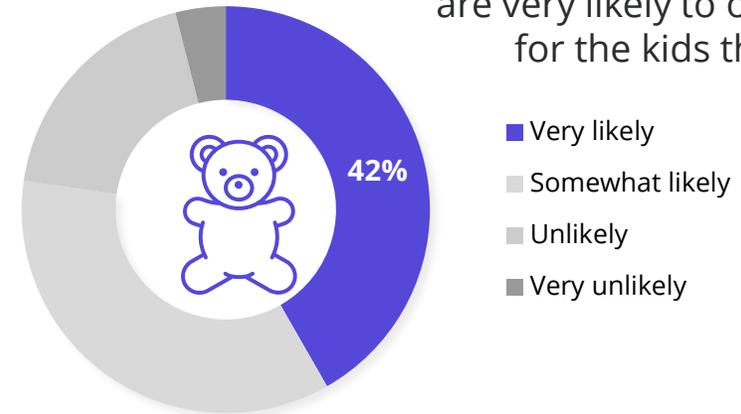
4 in 10 plan to cut back on personal expenses and dip into rewards points to afford Christmas.

Gen Z also expects (1 in 3) to take a side job/work more hours and sell some personal possessions to afford Christmas.



## Gifts just for the kids

In fact, 42% of parents say they are very likely to only buy gifts for the kids this year.



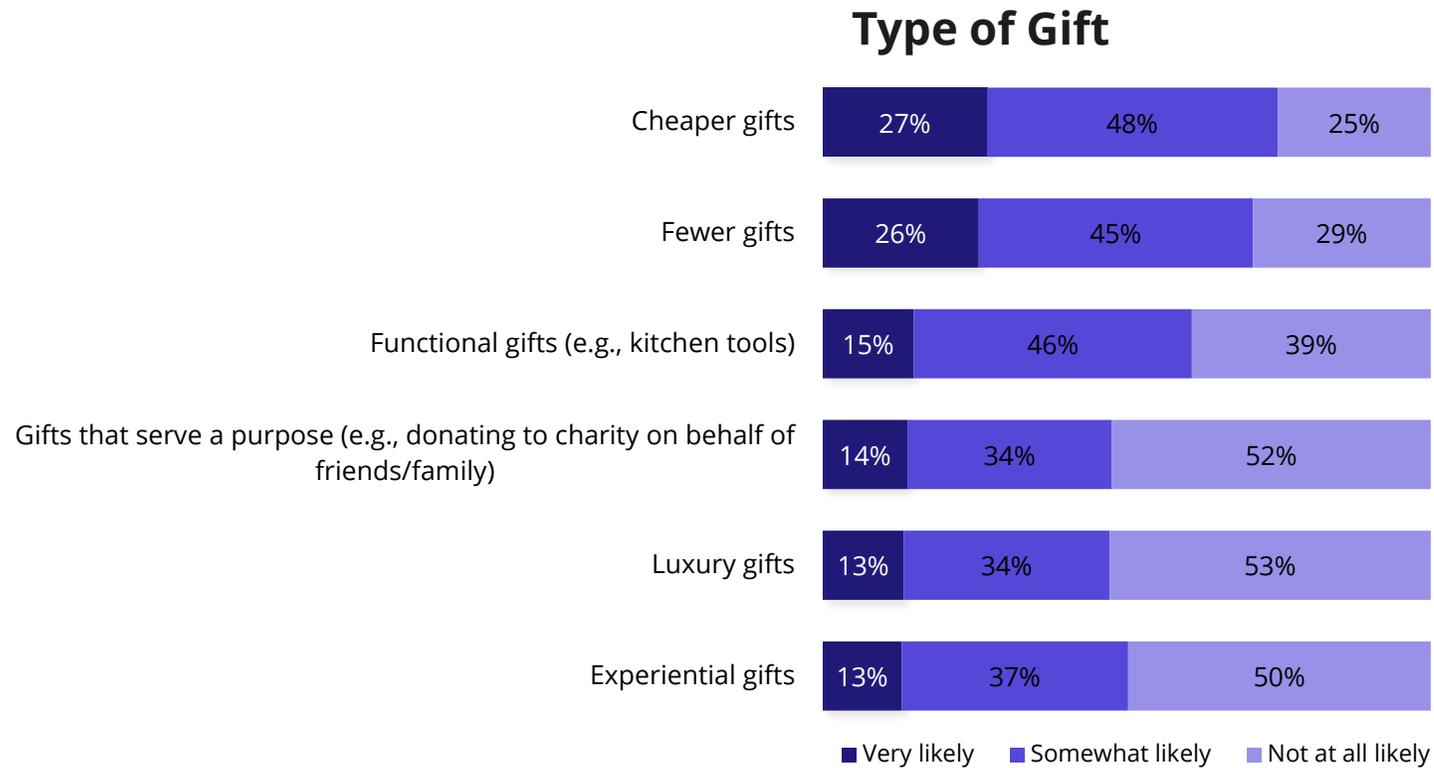
## Re-gifting



1 in 5 will regift a present this year to save on costs! (40% of Gen Z).

q4 - Will you be looking at any alternative ways to be able to afford spending more during this year's holiday season? Base: UK (2,156)  
 q28 - How likely are you to buy gifts just for the kids this year? Base: UK; has kids under 18 at home (805)  
 q30 - Do you plan to re-gift presents this year to save on costs? Base: UK (2,156)  
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There is a modest likelihood that 2022 will be the year of fewer, cheaper gifts (rather than functional gifts).



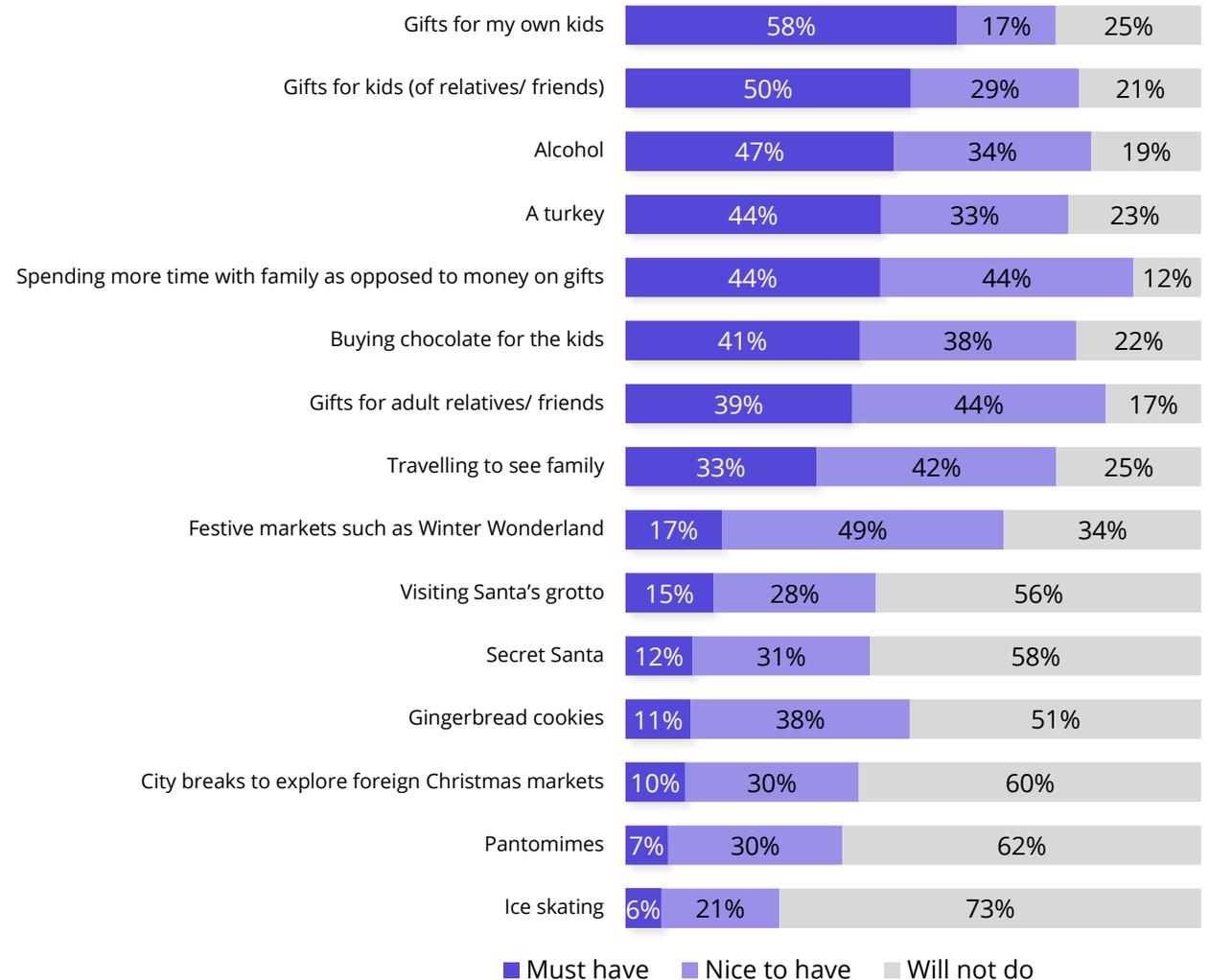
# Priorities for the Christmas Season

Gifts, particularly for kids, are must haves for most families this Christmas.

For a significant number (especially men), alcohol is a mandatory part of the Christmas experience (and this is equally true across all age groups).

Food also plays an important role, with a Christmas turkey and chocolate for kids a must have for 4 in 10 people in the UK.

Visits to events such as winter wonderlands, Santa grottos or pantomimes are nice to have this season.





# Online Shopping



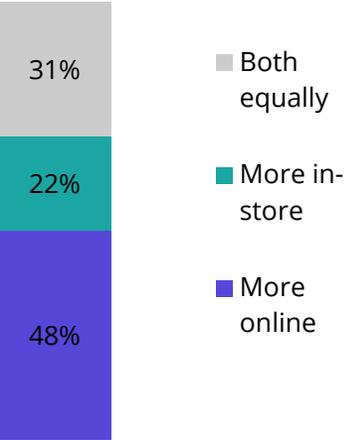
# Online vs. In Person



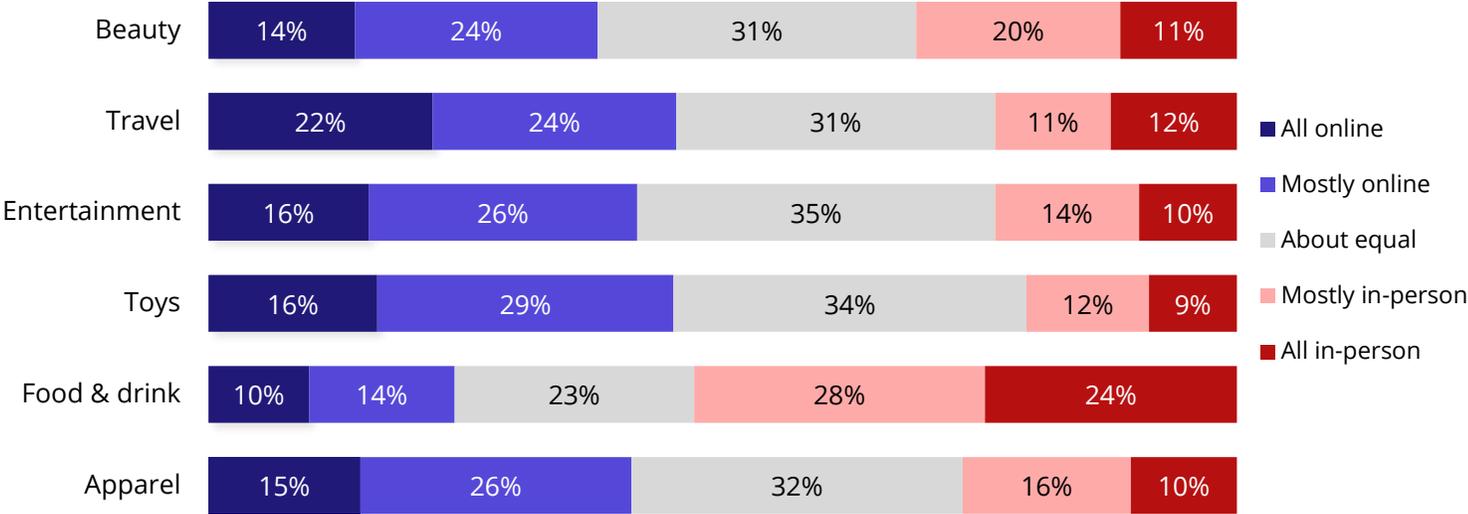
Despite eased restrictions on in-person shopping, online shopping continues to dominate, in all categories except food & drink and to some extent beauty.

Half of Gen Z and Millennials say that all or most of their shopping will be online (again, except for food & drink).

## Where Planning to Shop



## Categories of Christmas Shopping



q20 - Where do you plan to shop more this Christmas season – in-store or online? Base: UK (2,156)  
 q24 - Thinking specifically about different categories of Christmas shopping, how much do you plan to do online this year? [e2 from 2021 UK Consumer Survey] Base: UK (2,156)

# Online vs. In Person



Quick, easy, convenient shopping are reasons that all ages prefer to shop online. Avoiding crowds is also important, particularly to Boomers.



As in 2021, early discounts and deals are highly valued by UK shoppers, though the importance of this is significantly higher in 2022.

## Priorities for Purchases



q25\_top3 - Please rank which of the following would be your top priorities when considering purchases from online brands this Christmas season [e10 from 2021 UK Consumer Survey]

In our £300 spending scenario, gifts represent half of the spend, followed by food, and entertainment with the lowest spend.

Entertainment spend is higher among younger generations, while older generations will spend a little more on food.

## How would you spend a £300 Christmas budget



# Black Friday



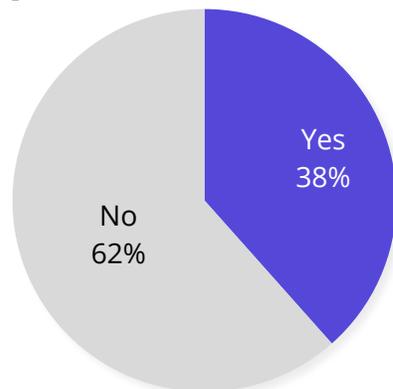
# Black Friday

In line with our prediction last year, just under 4 in 10 said that they shopped on Black Friday last year. A slightly higher number plan to do so this year. Nearly all the Black Friday shopping is expected to be online. (Online Gen Z has significant in-person shopping intentions).

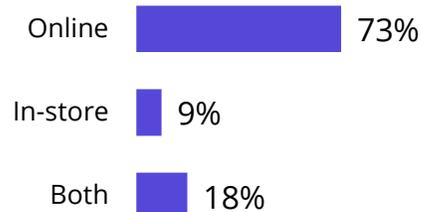
The top reasons for shopping on Black Friday relate to getting good deals and spreading out holiday spending.

Gen X and Boomers are more likely than other ages to say that Black Friday helps to avoid the rush and avoid supply chain or delivery issues.

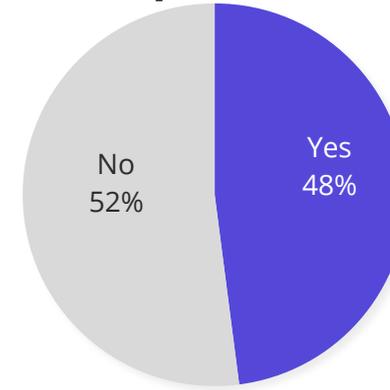
## Shopped on Black Friday 2021



## Shopping Where?



## Planning to Shop on Black Friday 2022



Black Friday offers better deals and prices for buying gifts (71%)

Shopping on Black Friday will help me spread out my spending (40%)

Black Friday shopping is fun (34%)

Black Friday no longer offers good deals (35%)

I am cutting back on Christmas gift shopping this year (25%)

I prefer shopping for gifts closer to Christmas (16%)

q18 - Did you shop for gifts on Black Friday in 2021? Base: UK (2,156)

q19 - Are you planning to shop for gifts on Black Friday this year? Base: UK (2,156)

q19a - Where are you planning to shop on Black Friday? Base: UK who plan to shop (1,034)

q19b - Why are you planning to shop on Black Friday? UK who plan to shop (1,034)

q19c - Why are you not planning to shop on Black Friday? [f10 from 2021 UK Consumer Survey] UK who do not plan to shop (1,122)

# Shipping

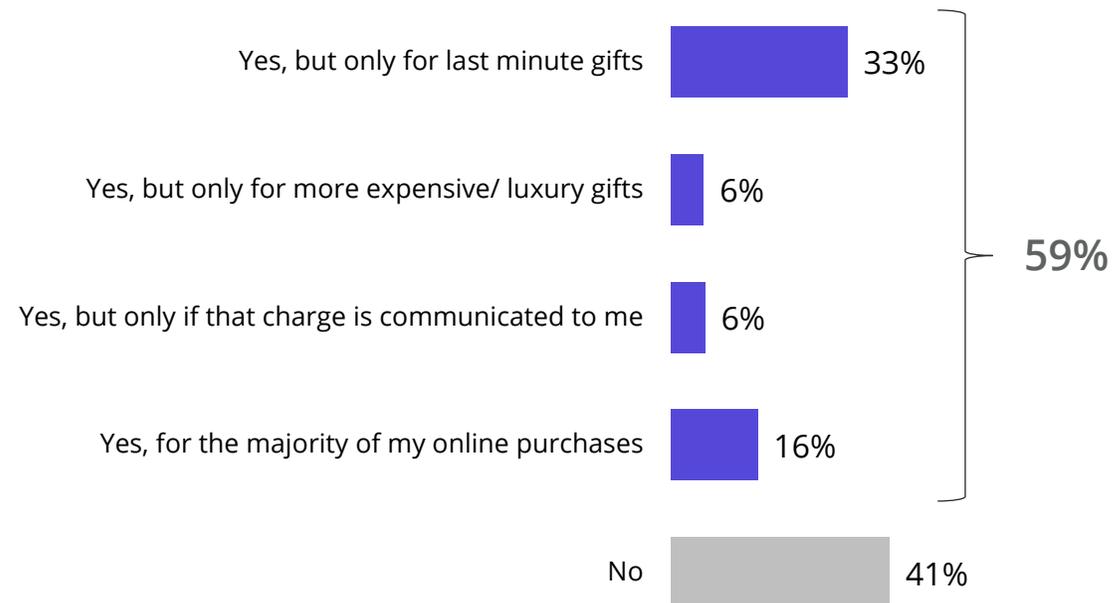


# Willing to spend for last minute gift shipment

6 in 10 would pay additional fees to ensure gifts are delivered on-time, but for most, this will be limited to last-minute gifts.

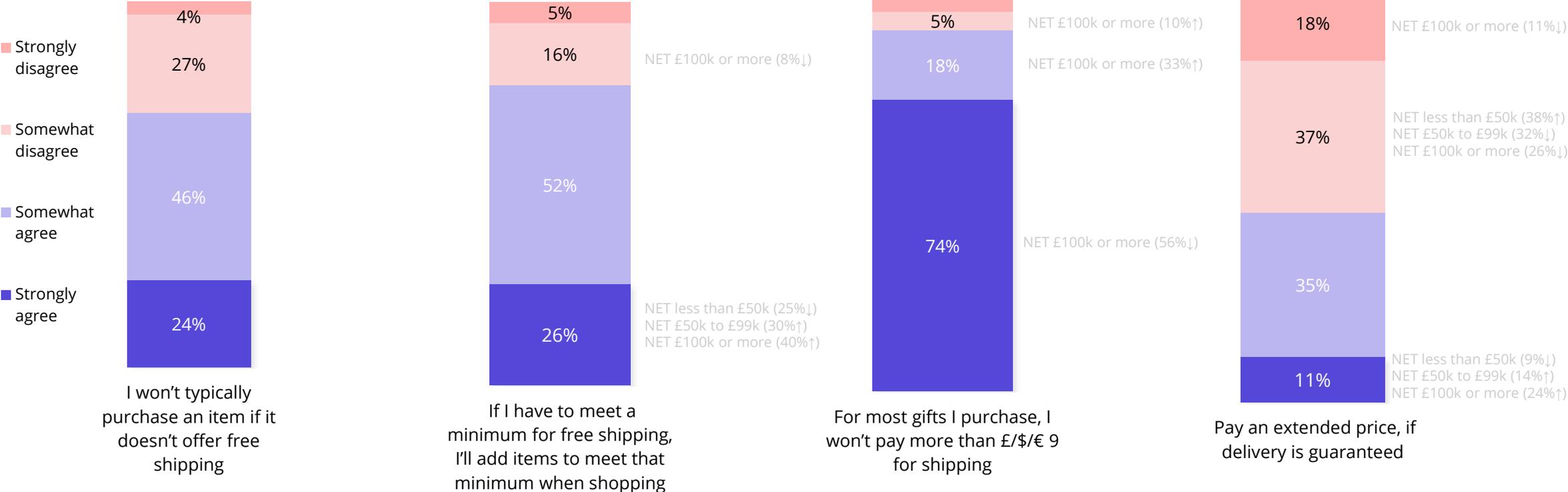
For those with high income (over £100k), this is a no-brainer, with 41% saying they will pay the additional fee for the majority of their gifts.

## Additional fee for fuel/ express delivery



# Shipping

For most, £9 represents a firm maximum shipping cost. Higher-income shoppers are very likely to say that they will meet free-shipping minimums by adding to their cart, or will pay extra to guarantee delivery, two things that lower-income shoppers cannot afford to do.



q8us3 - When it comes to shipping, do you agree with any of the following? Base: UK (2,156)  
 Callouts: What was your total household income in 2021 before taxes (in £)? Base: UK, excludes 'prefer not to say' (2047)  
 Arrows indicate significance at the 95% level and the direction of change.

Free shipping, in consumers' minds, is as powerful as a significant cash discount on sale items.

## “On Sale” Deals



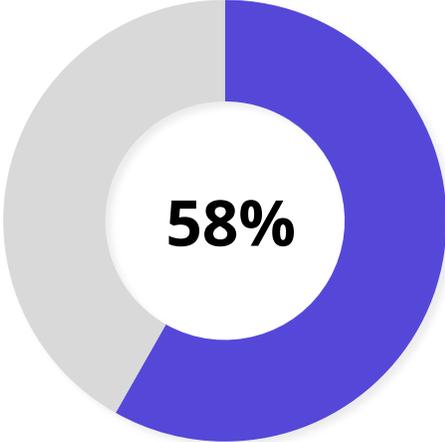
# Shopping Trends



# Clandestine Shopping

6 in 10 workers have done Christmas shopping during the work day, while 4 in 10 of those that have shopped have done so in a secret browser. Gen Z and Millennials are more likely to do both .

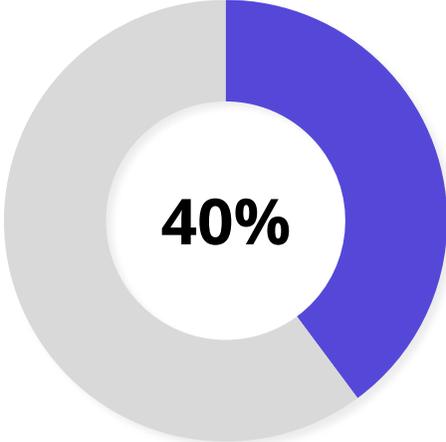
## Shopping at work



Millennials (70%↑)

Have shopped during the workday or while working.

## Secret Browser



Gen Z (61%↑), Millennials (45%↑)

Opened a secret browser on work computer to shop.

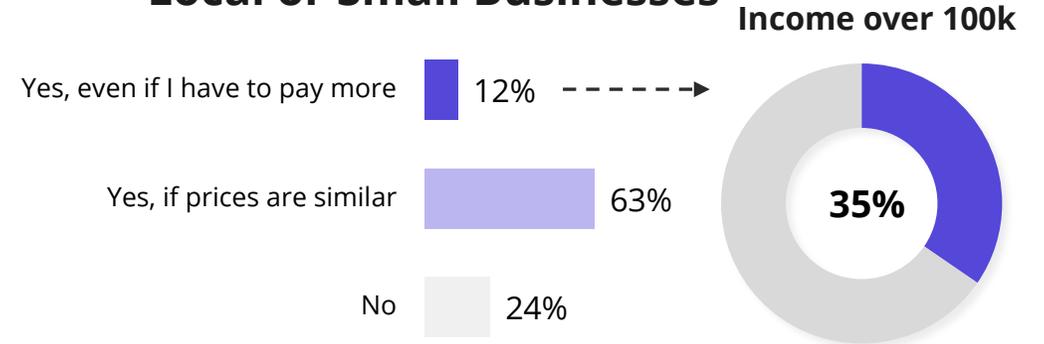
q8us5 - Do you, or have you ever done, Christmas shopping during your workday or while you were working? Base: UK; full or part-time employed (1,371)

q8us6 - Have you ever opened a secret browser on your work computer so your employer wouldn't find out you were shopping during the workday? Base: full or part-time employed and have shopped at work (798)

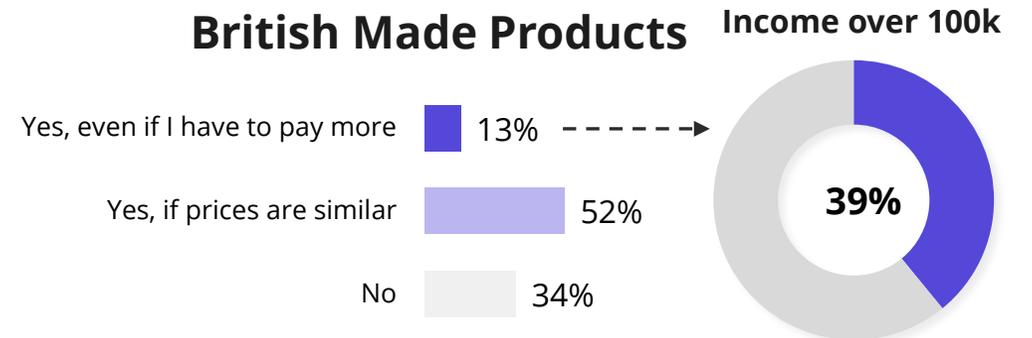
As long as prices are competitive, consumers in the UK will prioritize British made products and small businesses.

Gen Z is more likely than other ages to shop local, but the best target may be consumers with the highest income – 1 in 3 of those whose income is over £100k will pay more for local goods or those sold by small businesses.

## Prioritize Local or Small Businesses



## Prioritize British Made Products



q8us7 - Will you prioritise shopping with local or small businesses this Christmas season? Base: UK (2,156)

q8us9 - Will you actively seek out or prioritize buying British made products this holiday season? Base: UK (2,156)

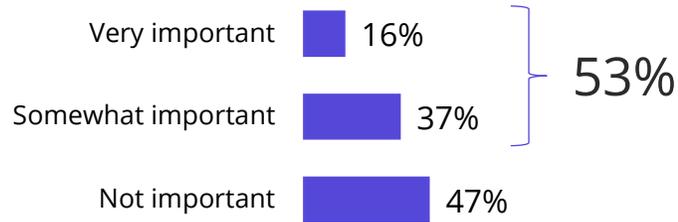
# Black-owned & minority-owned products & services



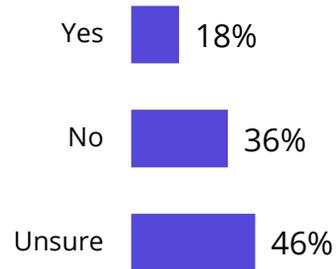
Unchanged from 2021, half of UK consumers say that it is important that Black and minority owned products and services are available, though most are unsure if they recognize these products in market.

Only 1 in 10 is willing to pay more to support Black and minority-owned products and services, though this elevates to 1 in 3 of those with income over £100k.

## Importance of Black-owned & minority-owned products & services being available



## Are you seeing more Black-owned & minority-owned products & services available?



## Willingness to Spend on Black-owned & minority-owned products & services

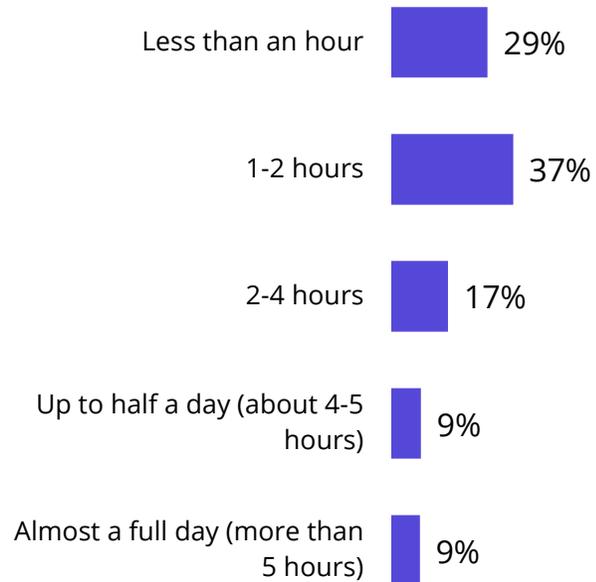


# Sources of Inspiration for Gifts

Browsing online is the most popular way to get gift inspirations this Christmas.

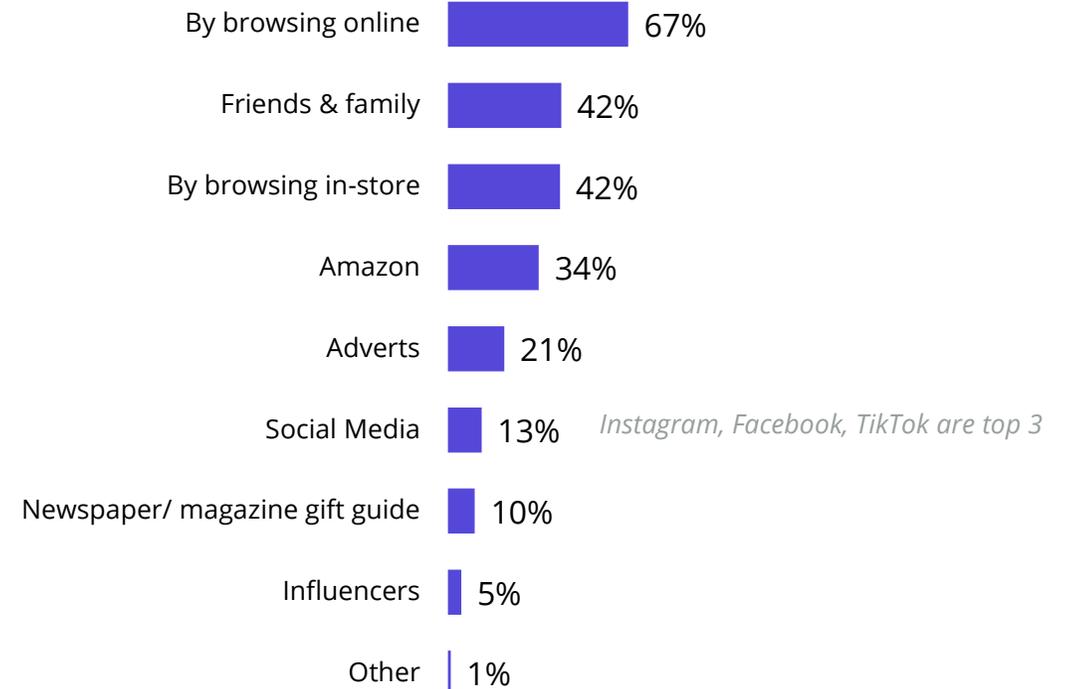
Note – for 2/3 of Gen Z and Millennials, browsing in store didn't make their top three sources of inspiration.

## Gift Researching



## Sources of Inspiration

(% rated in top 3)



q8us1 - If you have a specific gift in mind, how long will you spend researching and comparing prices for that item before you buy it? Even if you spend time over several days coming back to an item... Base: UK (2,156)

q23 - Where are you going to get gift inspirations from this Christmas season? Base: UK (2,156)

# How Retailers can make Christmas memorable



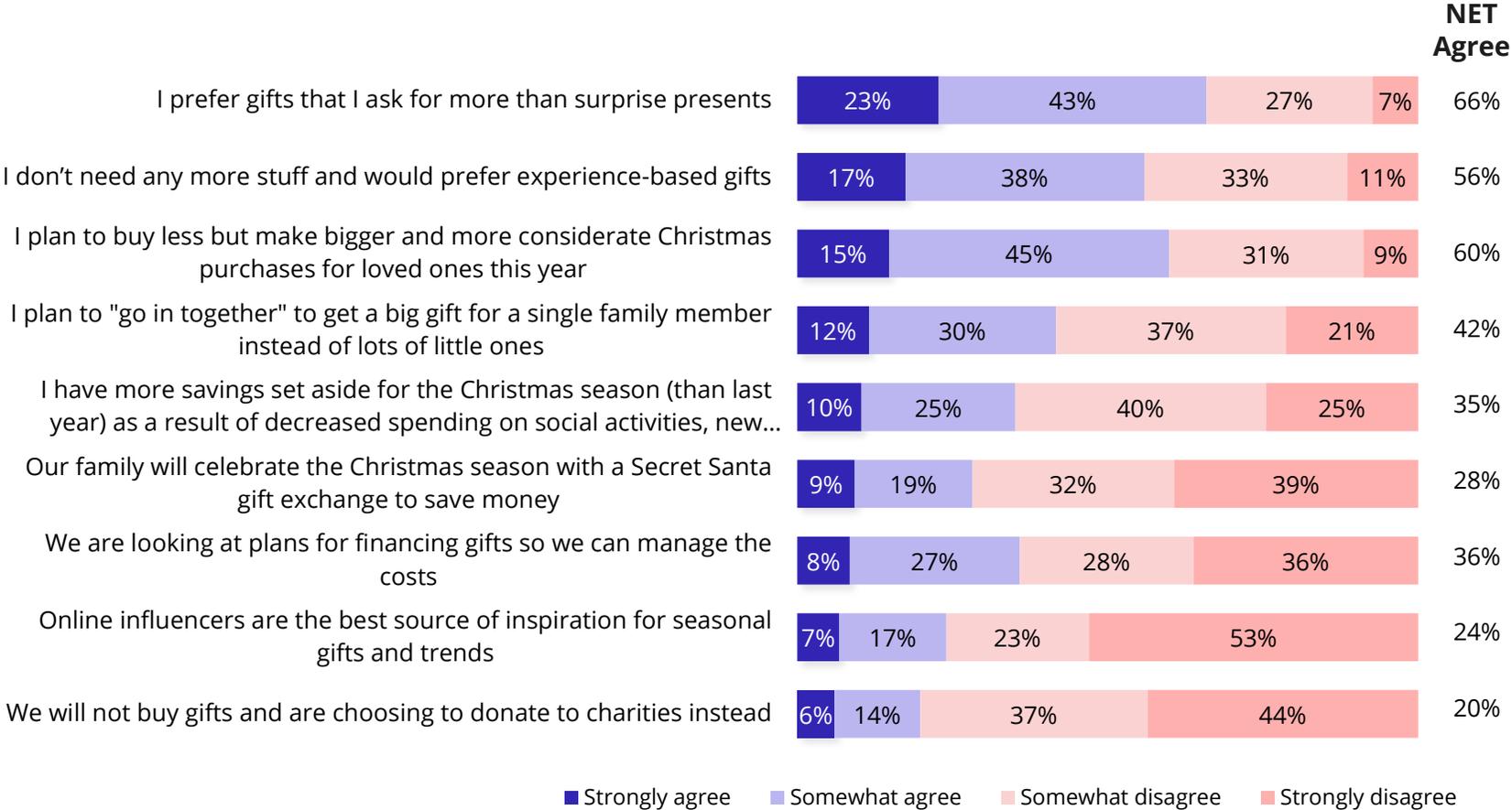
Convenience is an important way that retailers can help make Christmas memorable this year – making it easy for consumers to shop in person or to receive gift deliveries.



q31 - Other than being mindful on the cost, what else could retailers do to help make Christmas more memorable this year? Base: UK (2,156)

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# Gifting Wishlist



q14 - To what extent do you agree with the following? [f3\_a from 2021 UK Consumer Survey] Base: UK (2,156)

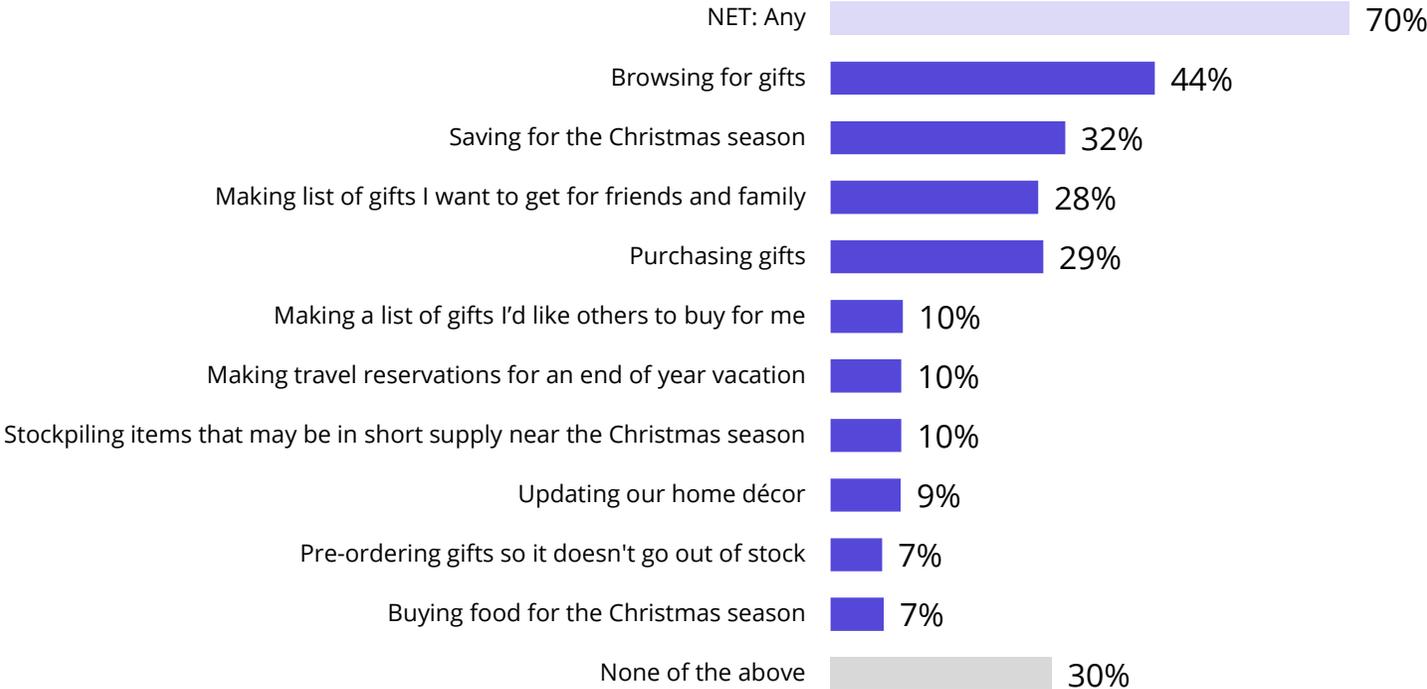
# Timing of Christmas Shopping



# Christmas Shopping Timing

A high proportion of UK shoppers have started thinking about the Christmas season, with gift browsing and saving the most common activities being undertaken. Boomers are the only age group where fewer than 1 in 3 have started saving.

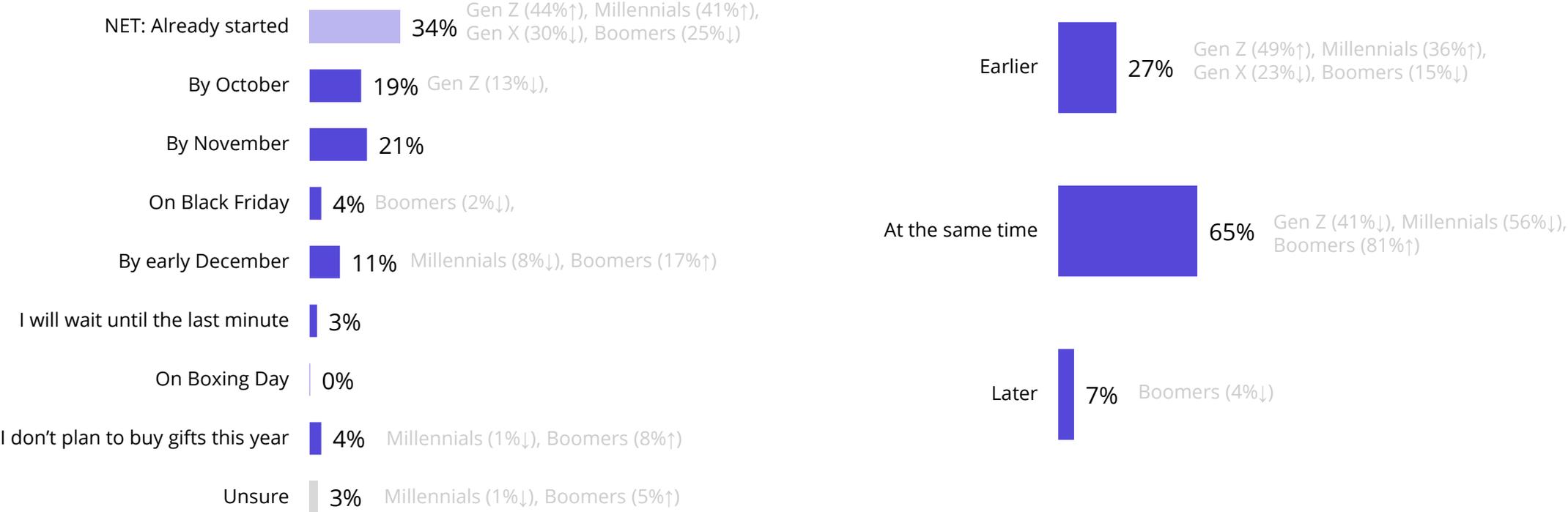
This is higher than we observed in 2021, but it should be noted that in 2021, we fielded the survey in June.



q3 -Have you started doing any of the following for the holidays this year? Base: UK (2,156)

# Christmas Shopping Timing

1 in 3 UK consumers, particularly those in Gen Z and Millennial age groups, have already started Christmas shopping this year. For most, October and November are the most popular times to start shopping, though a significant number of Boomers will wait until December to start shopping. This is not a divergence from the time they shopped last year, though 1 in 4 say they are starting earlier.

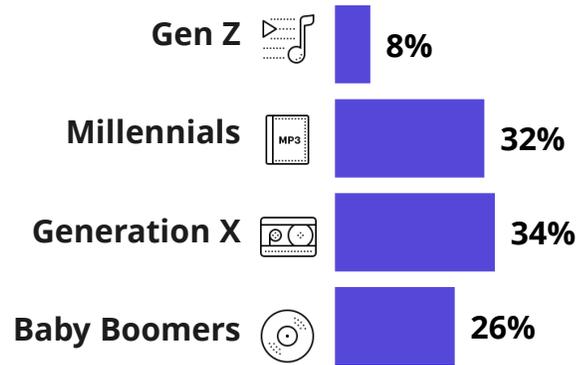


q1uk - When did/do you plan to start your 2022 holiday (e.g., Christmas, Hanukkah, Diwali, New Year's) shopping this year? Base: UK (2,156)  
 q2 - Compared to last year, did/do you plan to start holiday shopping... Base: UK (2,156)  
 Callouts: S0 (generations, age) - In what year were you born? Base: UK (2,156)  
 Arrows indicate significance at the 95% level and the direction of change.

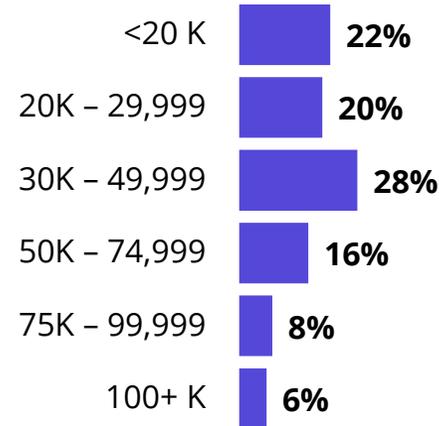
# Respondent Profiles



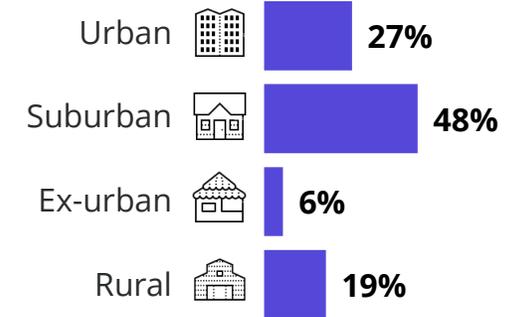
## Generations



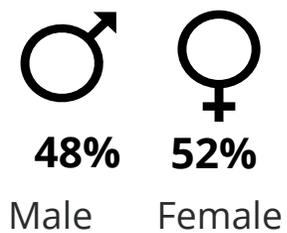
## Annual Income



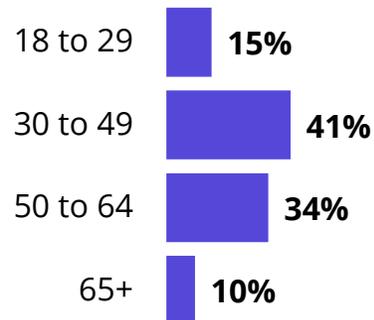
## Neighbourhood



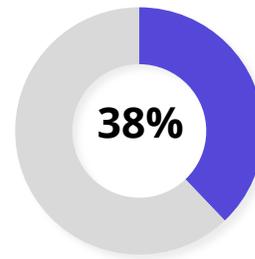
## Gender



## Age

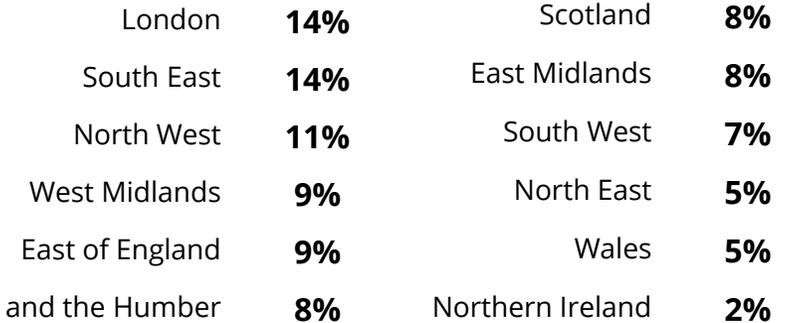


## Children at Home



with at least one child at home.

## Region



S0 (generations, age) – In what year were you born? Base: UK (2,156)

D3 – What was your total household income in 2021 before taxes (in £)? Base: UK, excludes 'prefer not to say' (2047)

D5 – How would you describe your neighborhood? Base: UK, excludes 'prefer not to say' (2,144)

S2 – How do you identify yourself? Base: UK, excludes 'prefer not to say' (2,147)

D4 – Do you have children under the age of 18 living in your home? Base: UK, excludes 'prefer not to say' (2,124)

D1UK (region) – Where specifically do you live? Base: UK (2,155)

# Appendix

The Christmas season will be the highlight of my year...	2021	2022
NET: Agree	53%	55%
Strongly agree	17%	14%
Somewhat agree	37%	41%
Somewhat disagree	31%	29%
Strongly disagree	16%	16%

How are you hoping to celebrate the Christmas season?	2021	2022
A simple celebration with my close family	55%	61%
Multiple gatherings with friends and family throughout the Christmas season	15%	<b>24%</b>
Going to get in the festive spirit early this year	11%	11%
A special New Year's eve celebration	13%	11%
Day trips / short stay vacations within my country	18%	<b>9%</b>
A big party with friends	10%	9%
A larger than normal celebration with extended family	10%	9%
A lavish vacation abroad	5%	5%
Longer vacations within my country	8%	5%
Other	1%	1%
Nothing, I don't plan to celebrate	14%	10%

q10 - How are you hoping to celebrate the 2022 Christmas season (e.g., Christmas, Hanukkah, Diwali, New Year's)? Base: UK (2,156)  
 [C6a from 2021 UK Consumer Survey] Base: UK consumers (1,021)

Where did you buy your Christmas turkey (or main food item) in ....	2021	2022
Tesco	23%	21%
Sainsburys	12%	12%
Asda	11%	11%
Aldi	10%	10%
Local butchers and grocers	9%	11%
Marks & Spencer	8%	8%
Morrisons	7%	6%
Lidl	5%	7%
Waitrose	3%	3%
Costco	1%	1%
Co-op	1%	1%
Other	8%	8%

q16 - Where did you buy your Christmas turkey (or main Christmas food item) from in 2021? Base: UK (2,156)

q16a - Where are you planning to buy your Christmas turkey (or main Christmas food item) from this year? Base: UK (2,156)

How do you feel when you think about the 2022 Christmas season?	2022
I look forward to eating Christmas lunch/dinner with my family	16%
I look forward to all the festive celebrations	12%
I am feeling excited to spend time with family and friends	12%
I am indifferent	11%
I look forward to choosing gifts for friends and family	10%
I am dreading that I won't be able to afford it	9%
I look forward to cooking Christmas lunch/ dinner	9%
I haven't started thinking about it yet	7%
I am not looking forward to it as I don't enjoy this season	6%
I can't wait to binge all my favourite Christmas films	5%
Unsure	2%
Other	1%

# Impact of Influencers

## 2021 results

q6\_agree - [Summary table] To what extent do you agree with the following attitudes about online 'influencers'? (NET Agree)

	age - In what year were you born? (Recoded, Buckets)			
	Total	NET 18-44	NET 45+	
I'll have a "fear of missing out" (FOMO) if I am not able to obtain a product or service a favorite influencer presents for the holiday season	21%	39% S ↑	8% S ↓	
I'll be looking to influencers I follow to inspire my holiday preparations, including decorations and clothing	24%	44% S ↑	10% S ↓	
I don't trust online influencers and their recommendations	75%	64% S ↓	82% S ↑	
I don't relate to the influencers out there	81%	74% S ↓	86% S ↑	
I'd love to be an influencer	22%	40% S ↑	9% S ↓	
I find influencers vain and annoying	81%	73% S ↓	87% S ↑	
I am inspired by their lifestyles - influencers show me how to live my best life	26%	45% S ↑	12% S ↓	
I am already an influencer	18%	34% S ↑	6% S ↓	
Influencers don't interest me at all	82%	71% S ↓	90% S ↑	

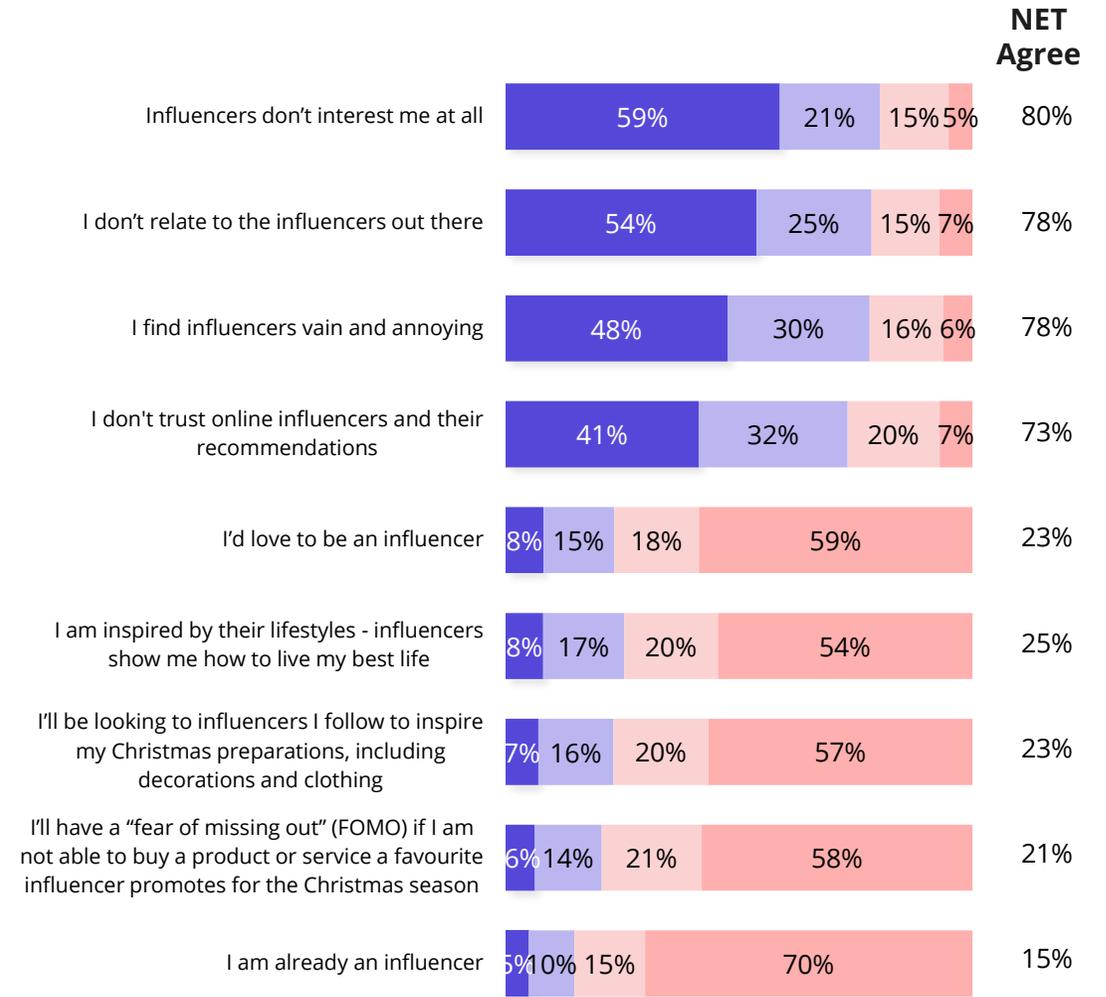
**Weight:** Unweighted

**Filters:** In what country do you live?: England, Northern Ireland, Scotland, Wales

Upper case letters indicate significance at the 95% level.

Arrows indicate the direction of a statistically significant change.

Each column is compared to the sum of all other columns, excluding itself.



■ Strongly agree   
 ■ Somewhat agree   
 ■ Somewhat disagree   
 ■ Strongly disagree



# Thank you

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