DID YOU KNOW?

Consumers adjust their holiday purchase plans as they grapple with inflation and a potential recession. Environmental concerns are diminishing as consumers look to governments and businesses to take a more active role in sustainability.

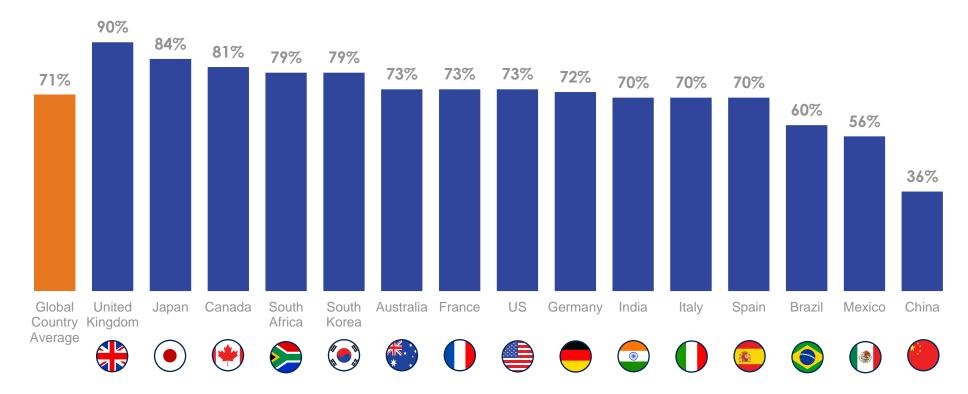


November 2022

The threat of recession looms large in many countries

"MY COUNTRY IS HEADED TOWARDS A RECESSION"

TOP-2 BOX AGREEMENT

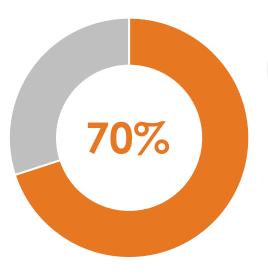


Shoppers are mitigating financial pressures by buying less and managing their budget this holiday season

EXPECTATIONS FOR HOLIDAY SHOPPING

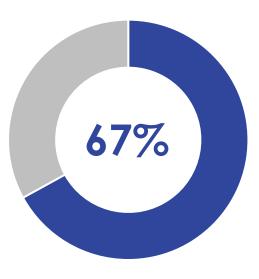
l expect to have less money to spend on end-of-year holiday gifts and celebrations this year"

Top-2 Box Agreement



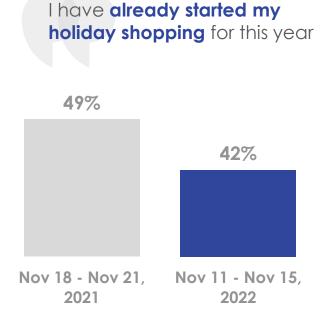
I'm planning to buy less this holiday season because of the impact of inflation on my finances.

Yes %



Tension between shopping plans and limited budgets means more shoppers are going to wait for deals on gifts

END-OF-YEAR HOLIDAY SEASON SHOPPING PLANS YES % I will hold off on buying gift items until they are on sale 60% 52% Nov 18 - Nov 21, Nov 11 - Nov 15, 2021 2022



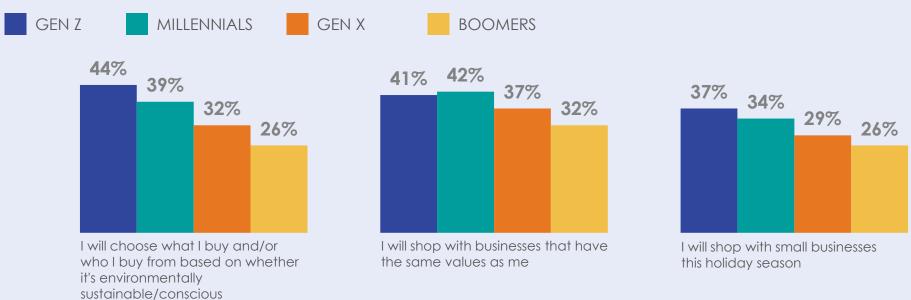
Compared to last year, fewer shoppers have started their holiday shopping as of November. Gen X and Boomers are taking it slower with fewer having started (36% and 32%, respectively).



Conscious consumers care about important values in their shopping, including sustainability

CONSCIOUS CONSUMERISM

TOP-2 BOX AGREEMENT



Still, a greater focus on other priorities, such as inflation, has increased the percentage of less environmentally-engaged Busy Bystanders in Ipsos' Sustainability Segmentation

CONSUMER GROUPS BASED ON ENVIRONMENT CONCERN

Activists

19%

Change from Feb 10-13 +2% ▲

Believe environment is at a critical stage and the world must act now. Will compromise lifestyle for environment.

Pragmatists

26%

-3%▼

Older & affluent.
Concerned
about the
environment and
will take action
through low-cost,
home-oriented
actions. Will
compromise if
necessary.

Conflicted Contributors

19%

+1%

Concerned about the environment but their financial situation takes precedence.

Busy Bystander 7

19%

+3% ▲

Care about the environment, but see many barriers to action on climate change, believing that it is inconvenient, expensive, and not a top priority.

Disengaged Denialists

17%

-2%▼

Environment is either not a concern, not immediate or largely overblown. Less inclined to take environmental action nor believe government/ companies should act.

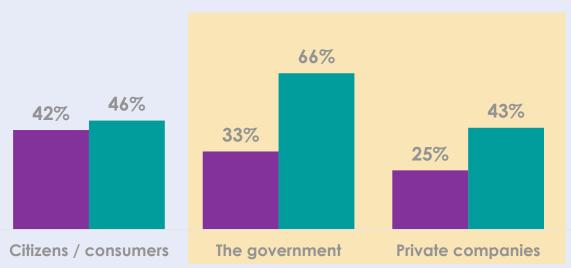
▼ or ▲ indicate change vs. Feb 10 - 13 (statistically significant @ 95% C.I.)

Consumers feel they are doing enough – the onus is on governments and companies to act

WHO CURRENTLY IS TAKING ACTION VS. WHO SHOULD BE TAKING ACTION TO IMPROVE ENVIRONMENT AND FIGHT CLIMATE CHANGE

Groups/Individuals that are acting (Action)

Groups/Individuals that need to act (Responsibility)



Ipsos Essentials monitors how people across the globe navigate the new rules of engagement and the resulting impact on our state of mind, state of wallet, and future intentions. Each month Ipsos surveys consumers in 15 countries, including: Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, Mexico, South Africa, South Korea, Spain, the UK and the US.

For more insights, country detail, or subscription information, contact essentials@ipsos.com