



**THIS IS THE
HOLIDAYS**

FINANCIAL WORRIES PERSIST

'Be prepared:' JPMorgan Chase CEO warns about inflation, recession

Why recession fears are back: Americans are losing faith

Is the Inflation Battle Won? Not Yet.

Inflation has come down from its 2022 heights, but economists are worried about its stubbornness.

Even Teenagers Are Worried About Inflation Now

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What Recession? Holiday Spending Predicted To Defy Economic Challenges

Press releases

Deloitte: Holiday Retail Sales Expected to Increase Between 3.5% to 4.6%

E-commerce holiday sales projected to grow between 10.3% to 12.8%, compared to 2022 season.

Cyber Monday's buying frenzy is bigger than expected, capping a record 5-days of holiday sales and limited recession fears

2023 Holiday Consumer Spending May Defy Expectations Yet Again

BUT PEOPLE ARE READY TO GO BIG

THE HOME ALONE YEAR

Another year. Another war, economic downturn, inflation and deflated sentiments and job market. Looks like the script hasn't changed from last time. 2023 was the year where we all felt Home Alone and accepted our realities. This is also the year when we could all use a little pick-me-up. Which is why probably we saw the holiday season hit earlier than usual. With inflation, people are looking for values and deals and probably staggering gift buying as they prepare for the holiday season. They are also using Pinterest and TikTok as sources of inspiration and discovery.

Holiday marketing this year seemed more modern and much more humorous, perhaps an attempt to distract from the realities we are living in. While we saw the usual crop of holiday advertising this season that leans into anticipation and kindness, we also saw something different and unexpected. For the first time in many holidays, brands humanized or even dispelled the myth of Santa showing him as one of us. We also saw brands target specific cohorts like the children, pet parents and the elderly to get them to participate in the holidays.

After a few years, we saw retail experiences boom again with many stores putting up exciting décor, offers and products to entice the holiday consumer. We also saw a lot of social media participation as brands extended their campaigns into the digital world.

For the crop of advertising this year, we saw four distinct macro themes emerge that capture the sentiment of the holidays and the consumer.

4 MACRO THEMES



HOLIDAY ANTICIPATION

Everyone is looking for an escape from the real world, and brands are giving that by feeding into the joy and the anxiety that comes with anticipating the busy holiday season.



LET'S GET REAL

With the state of the world and the need for authenticity, brands are embracing the real and becoming more grounded, letting go of make-beliefs and traditional trends



CATCH ME IF YOU CAN

People are spending less but shopping more, and brands are leaving no stones unturned to show consumers that they have whatever consumers need



LONG LIVE THE HOLIDAY SPIRIT

Despite everything that's happening people are still craving the warmth and joy of the holidays, and brands are doing their part to provide just that

THE (HOLIDAY) ANTICIPATION

Everyone is looking for an escape from the real world, which is probably why the holidays seem to have arrived earlier this year. Holiday Shopping Season in 23 started as early as September in an attempt to capture more consumers, as people look for better prices and deals. Brands have built their marketing on the joy and anxiety that comes with the holidays.

IS IT HERE YET?

We saw a lot of brands this year play into the anticipation of the holidays. From releasing campaigns or teasers right after Thanksgiving or playing into the sentiment of "It's never too early for the holidays." As the world reels under economic and political pressures, brands tap into the spirit of the holiday to provide much needed relief.



Tesco's 'Helping you #BecomeMoreChristmas' literally personifies this spirit as people turn into snowwomen, Christmas trees and reindeers. The spirit finally rubs onto the teenage son who had remained reluctant to get into the festive spirit as he transforms into a Christmas tree himself, topped with handcrafted star.



Café Nerro's "One More Sleep" starts in the early days of October as you witness a woman's enthusiasm to get the Holiday menu. She counts down the number of nights before she can relish the special holiday menu.



Brands like Jon Lewis, ASDA, Marks & Spencers launched drip-feeds of ad clips across social platforms as a means to build hype. The ASDA campaign brings back Michael Bublé as it prompts people to 'Pop the Bublé.'

TAKING THE PRESSURE OFF

While the holidays come with a lot of joy, they also come with a lot of expectations — to be the perfect host, to have the right decorations, and to do everything by the book. This season, we saw brands telling the consumers to let go and celebrate holidays in their own way.



McDonald's taps into this phenomenon as it rescues people from customary holiday gatherings by calling them to the golden arches. McDonald's presents itself as an escape from the nonstop customary celebration.



Waitrose explores a holiday party where all that can go wrong, goes wrong--but the food ensures that the holiday spirit remains intact. It nods to the fact that when the food is good, everything's good, taking the pressure of curating and creating perfect moments.



Other brands like Tui, Marks & Spencers, Morrisons, Amazon Prime, and IKEA urge people, and even elves, to holiday the way they want. IKEA's 'Take a Holiday from the Holidays' showcases people and even Santa taking a moment from the holiday chaos to relax and breath.

A woman with a surprised expression, hand to her face, in a bokeh light background.

LET'S GET REAL

With the state of the world and the need for authenticity, brands are embracing the real. As the consumer changes and shifts in how they buy and interact with brands, we see a new crop of holiday advertising emerging which humanizes or dispels what we once believed made the holidays, the holidays.

SANTA IS ONE OF US

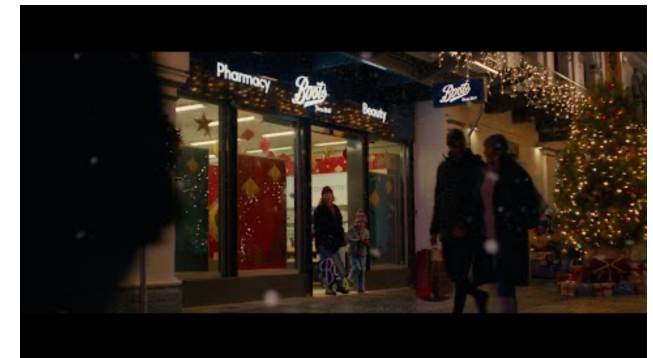
In a departure from traditional holiday advertising, we saw many brands tapping into the idea that Santa is just another person, whereas Santa is usually presented as more of a magical being than an actual person. Synonymous with being the gift bearer and the one to put you on the naughty or nice list, we saw the ultimate gift- and joy-giver being projected as more human than ever before.



Coca-Cola's 'The World needs more Santas' leans into the Santa spirit with plenty of Santas. These Santas are actually everyday people showing their 'inner Santa' through acts of kindness and generosity emphasizes. Coca-Cola shows the spirit of Santa can live in all of us through simple acts of goodwill.



Sainsbury uses a slick role reversal, showing a little girl wondering what Santa eats for dinner. As people guess Santa's dinner, it magically appears at Santa's table ensuring he has a holiday feast just like everyone else.



Macys, Burger King UK, Boots, Tayto, and Quicksilver, amongst many others, humanized Santa like never before. Boots' 'Boots Give Joy' showcases a mother and daughter as they take the journey to get a gift to Santa and drop it from his chimney, so that Santa isn't left without a present.

TRADITIONS ARE WHAT YOU MAKE OF THEM

With people embracing the unexpected and getting comfortable with uncertainty, we see brands challenging traditional traditions. Brands are encouraging people to forge their own traditions and do what makes them happy.



Jon Lewis takes a departure from tear jerkers with 'Grow Your Own Tradition.' The advert shows a young boy who buys a Grow Your Own Perfect Christmas tree, only to grow a Venus Fly Trap. While the family throws the tree out and swaps it for the traditional tree, the boy embraces the change and eventually gets everyone else to see the perfection of the new Christmas tree.



PETA urges people to Kill the Tradition and not the Turkey as it showcases all the traditions people follow to make the holiday perfect — from matching family costumes to dazzling décor and even an evil Santa. As the turkey awaits their fate, it urges people to try vegan this holiday and part from a tradition that goes against the season of goodwill.



KFC also takes on the turkey tradition by answering if they would do turkey for the holidays. The ad takes us through delicious visuals of the prepping of what seems like Turkey only to reveal that KFC is sticking with chicken and ignoring all the Kentucky Fried Turkey chatter.

THE DAYS GONE BY

In perhaps another first, we saw brands acknowledge the aging consumer. According to 2020 US Census, over 54.9M Americans are above 65 years old. In fact, this cohort represented 22% of the spending power last year. Brands are realizing that they can no longer ignore this cohort of financially well-off consumers and are giving them a voice this holiday season.



Amazon's 'Joy is Shared' showcases three life-long friends reviving their childhood as they sled down a hill. The campaign proves that joyful moments are best shared as the friends relive their childhood.



Suchard's 'Life is what happens between Christmas and Christmas' is a walk down memory lane. As the elderly couple go into flashback, we see their holiday moments all the way back to 1973 which led up to the happy and joyful holiday they have now.



Kroger, Toyota, and Chevrolet also tackle the theme of ageism with their spots. Chevrolet's 'A Holiday to Remember' tells the story of a grandmother who is losing her memory and how she comes back to the present as her granddaughter takes her on a memory-filled journey.

LET ME SHOW YOU THE MIRROR

In the midst of traditional holiday ads, some brands kept it real and showcased what real looks like for people around the world. These brands didn't follow holiday cliché's but rather showcased the holidays from an authentic and grounded standpoint, making people take notice.



In another thought-provoking advert, Penny urges us to listen to voices of teens and children. The advert goes through a series of children and their struggles as they pose for the influencer mom, fight body issues and pressures, finally to break out to reclaim their world and put a stop to everything that they feel is wrong.



"Charlie's Bar" the viral advert for a small pub in Northern Ireland showcases how the aged feel alone this holiday and seek companionship which they get at the local pub where strangers become friends.



Shelter showcases the story of a little girl who decides to be good to get what she wants. She does everything she can to be as good so that she can get her wish. However, despite her best attempt, she doesn't get a home that she so wants.

A young boy wearing a textured, light-colored knit hat and a dark jacket is looking out over a city at night. The city lights are blurred in the background, creating a bokeh effect. The boy's expression is neutral as he gazes across the urban landscape.

CATCH ME IF YOU CAN

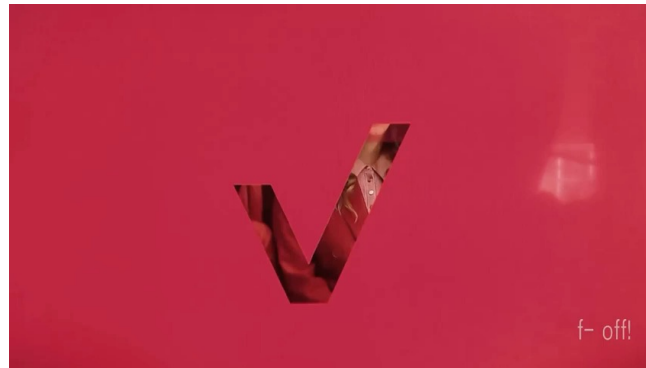
With people spending less, but shopping more, brands are doing everything they can to make it to the consumers list. They are being overt about their offers to capture attention and wallet.

I HAVE ALL YOU WANT

Brands are being overt about their products and services to capture the attention of the consumer. Whether it is the right gifts or the right values, brands are dialing up the 'why buy me' and giving a straight up reason to buy instead of beating around the bush.



Etsy's 'Mission Impossible' showcases Etsy as the place to shop for difficult shoppers, positioning Etsy as the go to place for custom gifts and ensuring shopping doesn't become a mission.



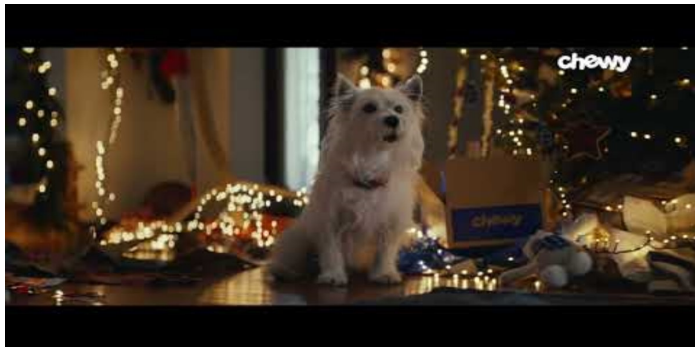
Verizon Carolers showcases a group of Carolers try to convince a women that her husband needs an iPhone. But all of that is not needed as the wife mentions since the better plan for the holidays is shifting to Verizon.



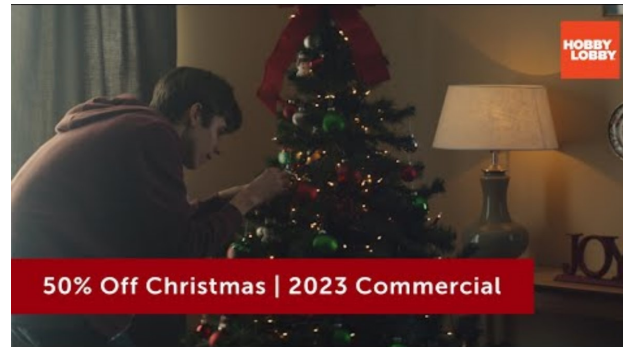
Brands like Target, Quicksilver and TK Maxx addressed value and how you can get the best without having to spend a fortune. TK Maxx's 'Festive Farm' features a group of adorable animals cat-walking out of their barn in their stylish new TK Maxx outfits—hinting at the great prices at TK Maxx.

I SEE YOU

Brands are no longer just focusing on one type of holiday shopper. They are casting their net far and wide to talk to specific shoppers and get their attention. Everyone from pet parents to children got a spotlight with this crop of festive ads.



Chewy, PetSmart and Temptations focused on the pet parent to ensure that dogs and cats have a happy holiday as well. Chewy's 'Pets aren't just Pets' showcases pets' excitement as they get bombarded with gifts, thanks to the great deals at Chewy.



Hobby Lobby's 'Christmas is what you make of it' showcases a teen shopping at Hobby Lobby as he tries to make the home holiday ready and surprise his mom.



Brands like Suchard, Amazon, Kroger, Ford, and Chevrolet addressed the aging consumer. Kroger showcases the story of an elderly couple who use food to connect with international students as they host them in their home.

A woman and a child are shown in a snowy, outdoor setting. The woman, on the left, is wearing a dark winter hat and a dark coat, and has several white birds perched on her head. The child, on the right, is wearing a dark winter coat. The background is a bright, snowy landscape with bare trees. The overall mood is warm and festive.

LONG LIVE THE HOLIDAY SPIRIT

Despite the many shifts in consumer attitudes and brand behaviors, people are still craving the feel of the holidays. They are looking for a sense of comfort in familiarity and the holiday spirit of joy, care, and kindness. In response, brands are building on classic hits and successful campaigns from previous years.

THROW IT BACK, KEEP IT GOING

Networks like Hallmark and Lifetime have strived to pump out new holiday content over the past years. Yet 2022's most-watched Christmas movie list was still dominated by familiar names, with *Home Alone* and *Charlie Brown Christmas* remaining on the top. Consumers are leaning into nostalgia to regroup themselves in the turbulent global atmosphere. To fulfill these emotional needs, many brands crafted their holiday stories around timeless classics and familiar characters. They are also determined to build on the momentum of successful holiday ads from previous years and create an evergreen campaign to solidify their role and voice.



Chick-fil-A makes a comeback with the stories of Evergreen farms with a longform film. The story carries forward from last year as Sam does her role well as an apprentice and goes on to the next adventure. This story around the Spark Tree shows Sam in a personal struggle as she helps her brother fight bullying and enables more sparks that feed Evergreen Farms.



After a success partnership with Paddington last year, Barbour returns with another British classic. In partnership with Shaun the Sheep, Barbour tells the story of the experts at their factory. While Shaun, sheepdog Bitzer and the Flock decide to repair the Farmer's well-worn Barbour wax jacket, they soon realize that repairing jackets are best left to Barbour.



Brands like Rakuten, Disney, and Aldi leaned into holiday stories and releases. We saw Aldi bring back Kevin the Carrot and tells the story of 'Kevin and the Christmas Factory.' This was a timely move given the imminent release of 'Wonka,' the origin story of the eccentric chocolatier Willy Wonka. The ad showcases Kevin as he goes through the chocolate factory and embraces the real meaning of Christmas.

KINDNESS IS ONE PERSPECTIVE AWAY

Kindness is a mainstay for holiday advertising. As consumer priorities and perspectives got reshaped by current realities, we saw brands pushing for people to see kindness where it exists and flip their perspective to find and foster kindness in others.



Apple depicts a story of a woman who strongly dislikes her boss and crafts stop motion stories everyday which cause his harm. However, it all changes one day when the boss gifts her a hand-woven glove and she realizes how lonely he is. She finally discovers empathy for him and helps him make his holiday.



Lidl shows the story of a raccoon who goes through hurdles and across the city to reunite a kid with his lost monkey. As the raccoon gives back the gift, he is accepted by the bully dog of the house for bringing joy and magic to the holidays.



Telestra, Telefora, Doordash, Montefiore, Milk,a and many others took the route of kindness. Milka shows how giving is the greatest gift as a brother cheers his sister after she breaks her showstopper by giving his beloved Milka Santa.

THE NEW & THE OLD

In an attempt to engage more audiences, we saw brands use technology, lean into old and new sounds, and amp up the in-store experience to get more consumers to look at them.



AI for the Holidays

We saw brands like Coca-Cola and Microsoft using the power of AI in their campaigns. Coca-Cola supplemented their TV campaign with an AI powered holiday card generator. Microsoft took people's best holiday moments and memories and uses AI to recreate them.



Cheesy Sounds

While there are a few contemporary tracks, most ads are steeped in the music of the 1980's. From 'Stayin' Alive' to the cover of the Beatles 'In My Life' to 'Isn't it a Pity and BK's rendition of 'Driving Home for Christmas', ads serve up sounds of the past. Dunkin and Festa are experimenting by creating an original song engage viewers.



Connected Experiences

Brands went big on providing an experience to the consumer. Brands like Target, Aldi, Walmart enhanced their in-store experience with new products and activations. Jimmy Dean played the Chief Hosting Officer by taking hosting off people's plates. The Cutwater Holiday Concierge comes to the aid of holiday hosts by dialing 1-833-DRINK-CW and via the brand's Instagram. Walmart plans to launch its first shoppable video series—a holiday-themed romantic comedy Roku, TikTok, and YouTube.

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MERRY CHRISTMAS
YOU FILTHY ANIMAL



AND A HAPPY NEW YEAR