



## 2021 HOLIDAY GIFT SHOPPING

# PRODUCT SHORTAGES & INFLATION IMPACTS

Consumers are making their lists and checking them twice... but many can't get all the items on their wish lists this year.

UPDATED 12/7/2021



**DECEMBER  
UPDATE**

(SLIDES 3-8)

**MID-SEASON SURVEY  
11/25 – 11/30/21**

Custom survey fielded to 10,562 Cyber Weekend shoppers asking about the impact of product shortages and inflation on their holiday gift shopping this season.

**ORIGINAL  
STUDY**

(SLIDES 9-16)

**PRE-SEASON SURVEY  
10/25/2021**

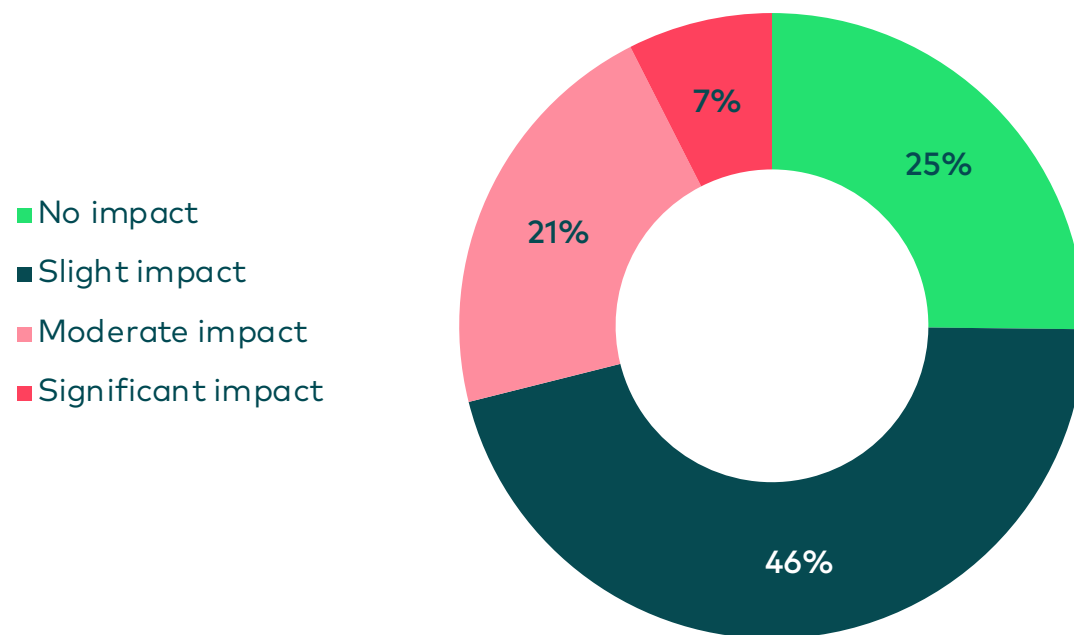
Quick Pulse Survey of 368 holiday gift shopper to gauge intentions leading into the gifting season.

# ARE HOLIDAY GIFT SHOPPERS EXPERIENCING PRODUCT SHORTAGES?

Roughly one-in-three holiday gift shoppers have experienced moderate or significant impacts to their gift shopping due to supply chain issues and product shortages. Half have noticed a slight impact, while one-in-four have not been impacted.

## Impact of Product Shortages

% of Holiday Gift Shoppers



**34%**

Have been moderately or significantly impacted by product shortages

**25%**

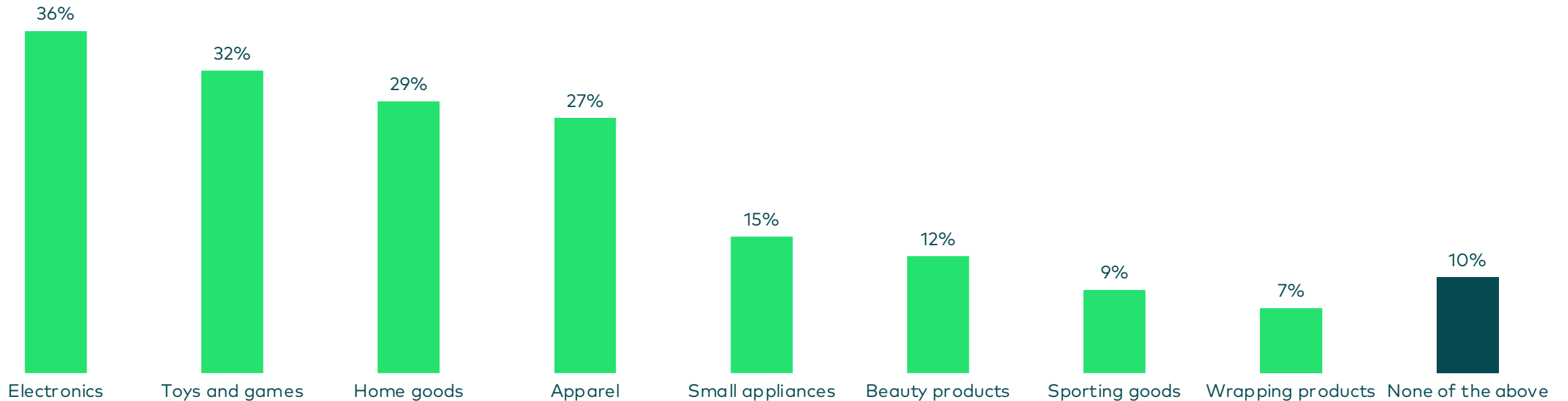
Haven't been impacted

# WHICH GIFT CATEGORIES HAVE BEEN IMPACTED MOST BY SHORTAGES?

Consumers have had the most difficulty purchasing electronics this holiday season, followed by toys & games, home goods, and apparel. Over one-fourth of holiday gift shoppers noted shortages in these categories specifically.

## Most Impacted Categories

% of Holiday Gift Shoppers

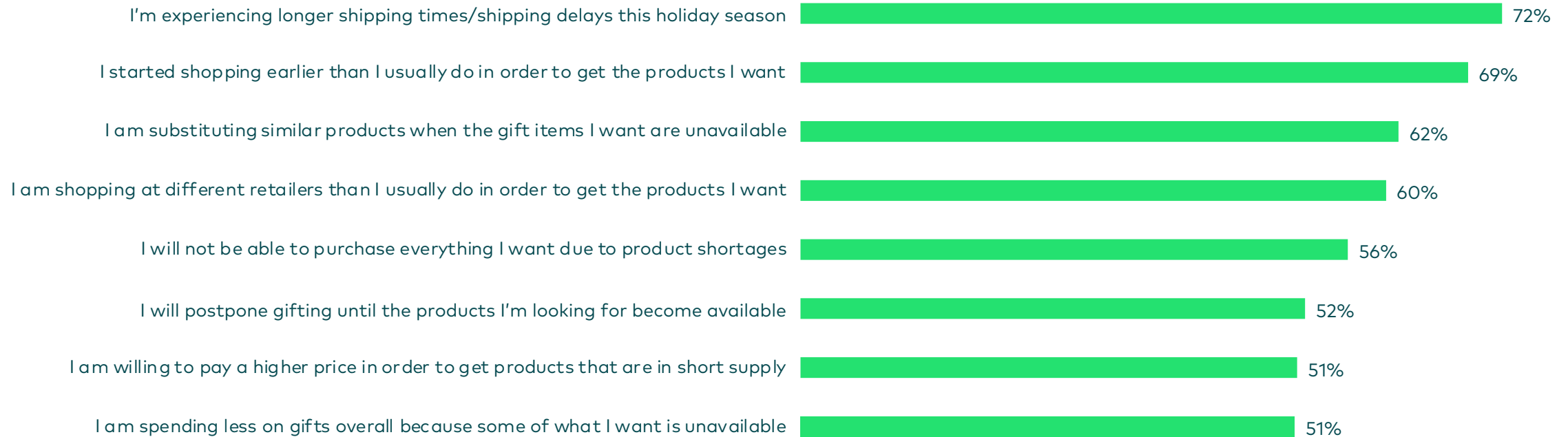


# HOW ARE CONSUMERS REACTING TO PRODUCT SHORTAGES?

Nearly three-fourths of holiday shoppers are experiencing shipping delays this holiday season, and over two-thirds started their gift shopping early to account for any delays. Three-fifths of consumers are substituting similar products when what they want is unavailable or switching retailers in order to find the gifts they want.

## Product Shortage Behaviors & Impacts

% who agree or strongly agree



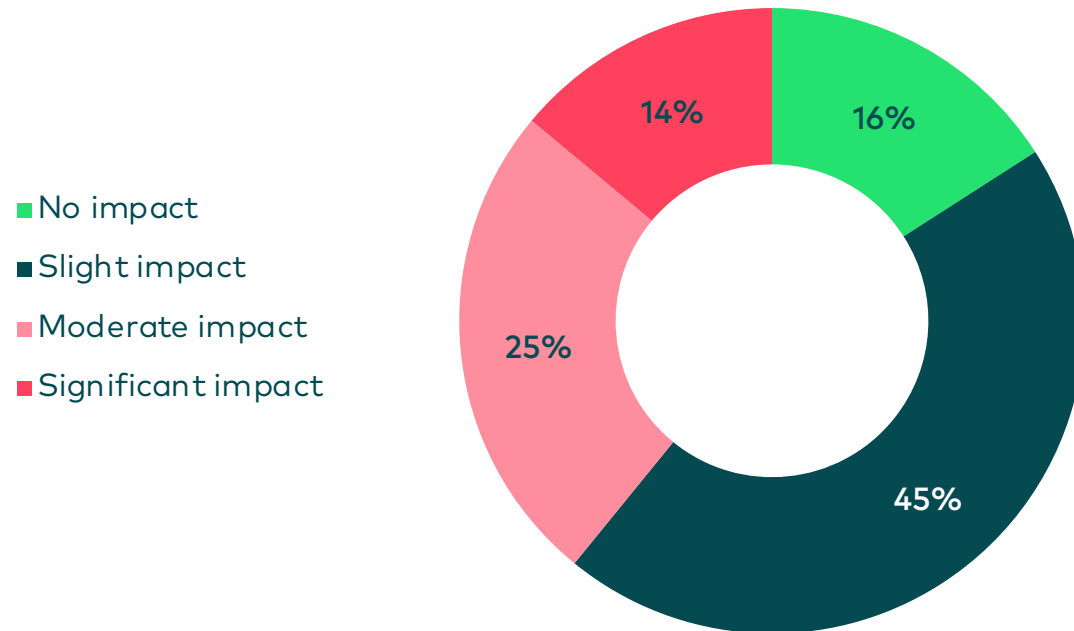


# HAVE HOLIDAY GIFT SHOPPERS NOTICED RISING PRICES?

Nearly two-in-five holiday gift shoppers have experienced moderate or significant impacts to their holiday shopping due to rising prices. Just under half have encountered a slight impact, while one-in-six have not been impacted.

## Impact of Rising Prices

% of Holiday Gift Shoppers



**39%**

Have been moderately or significantly impacted by rising prices

**16%**

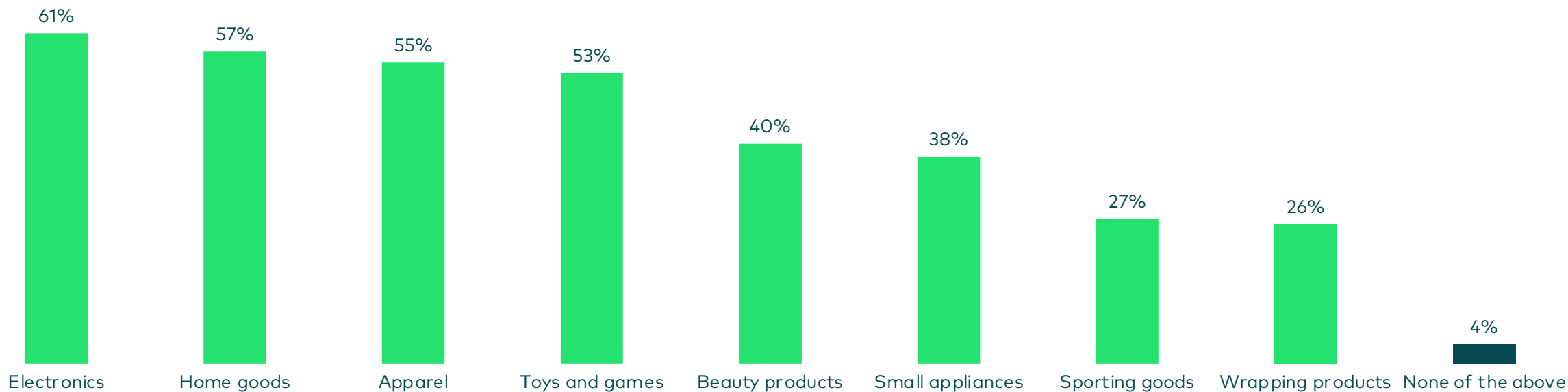
Haven't been impacted

# WHICH GIFT CATEGORIES HAVE BEEN IMPACTED MOST BY RISING PRICES?

Consumers have noticed rising prices across all holiday gift categories, with more than half citing electronics, home goods, apparel, and toys & games– the same four categories most-impacted by product shortages.

## Most Impacted Categories

% of Holiday Gift Shoppers

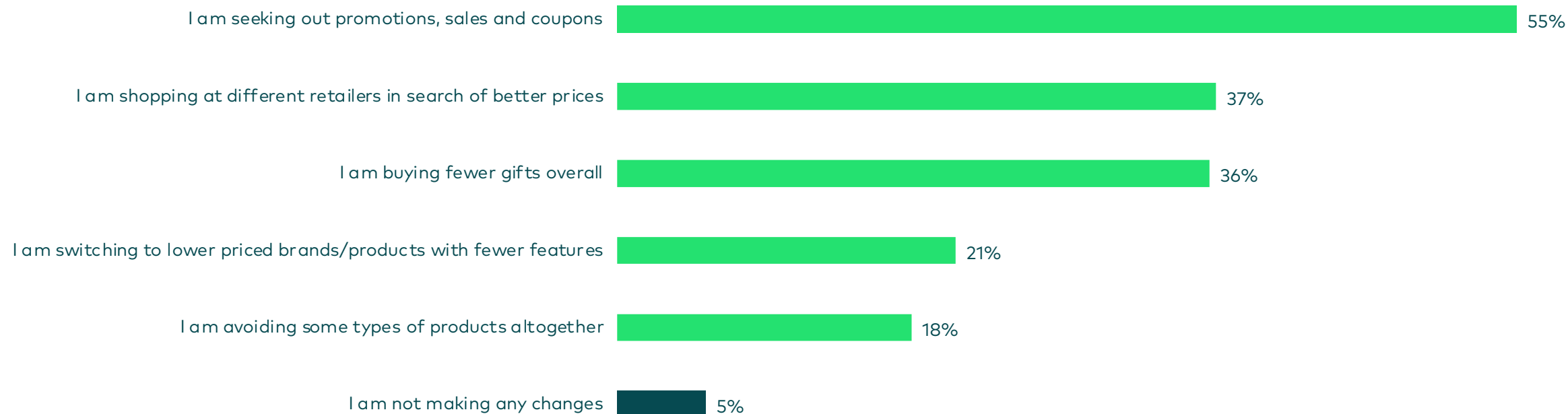


# HOW ARE CONSUMERS REACTING TO RISING PRICES?

The most common adjustment consumers are making to combat rising prices is seeking out sales this holiday season. Over a third are also shopping around to find the best prices, or buying fewer gifts overall.

## Shopping Adjustments

% of Holiday Gift Shoppers







# PRE-SEASON SURVEY

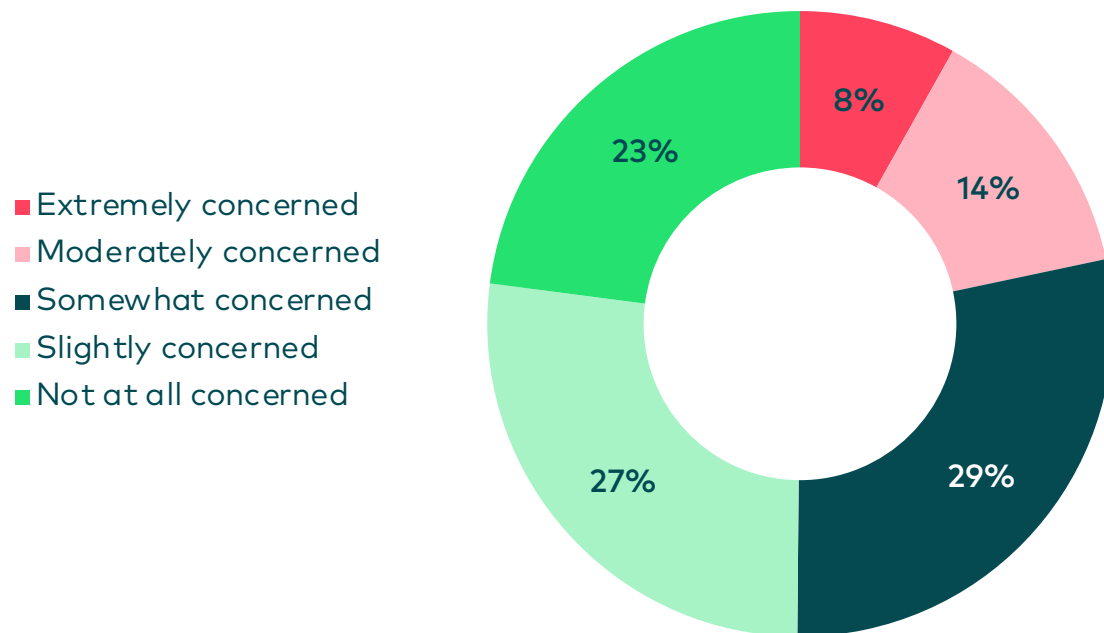
10/25/2021

# ARE SHOPPERS CONCERNED ABOUT PRODUCT SHORTAGES?

Over 3-in-4 gift shoppers worry that product shortages could have an impact on their holiday buying, though most are only somewhat or slightly concerned. 1-in-5 have a moderate-to-high level of concern about the impact of product shortages.

## Consumer Level of Concern Over Product Shortages

% of Holiday Gift Shoppers



**22%**

Are extremely or moderately concerned about product shortages impacting their holiday shopping

**56%**

Are somewhat or slightly concerned

# 41%

OF THOSE WHO HAVE  
ALREADY STARTED SHOPPING  
SAY THEY HAVE NOTICED  
PRODUCT SHORTAGES

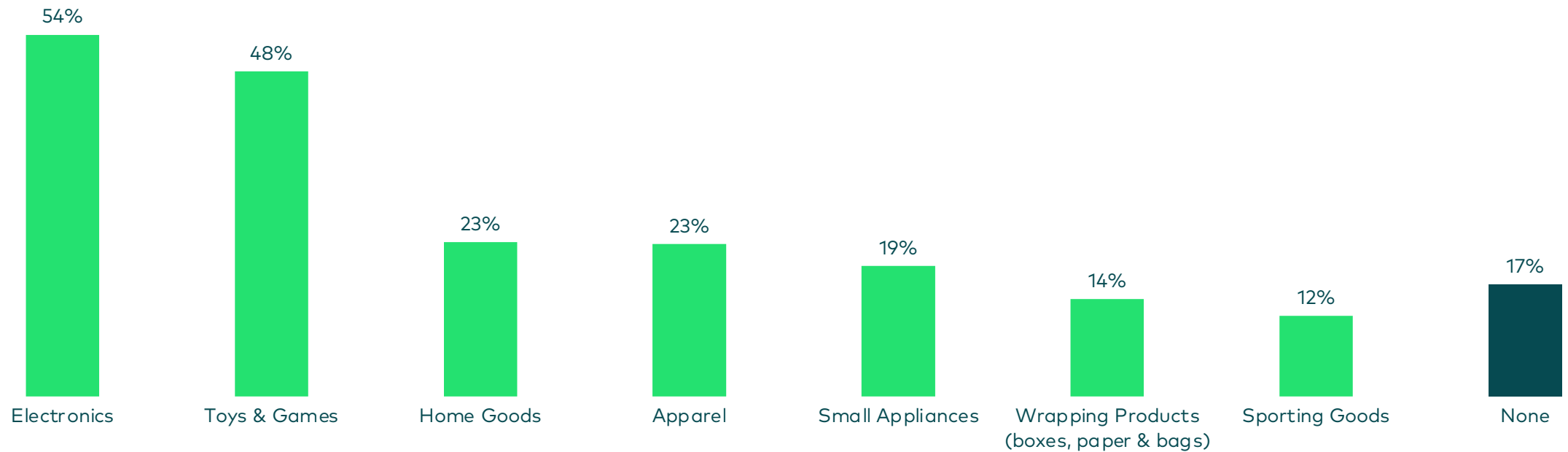


## WHICH CATEGORIES DO CONSUMERS EXPECT TO BE IMPACTED MOST?

Consumers think they'll have the most difficulty finding Electronics and Toys & Games, with roughly half expecting shortages in these categories. However, 1-in-6 expect to have no issues locating the products they want this holiday season.

### Expectations for Product Shortage Category Impact

% of Holiday Gift Shoppers by Category



# WHICH RETAILERS DO CONSUMERS EXPECT TO HAVE THE BEST PRODUCT SELECTION?

Consumers expect Mass retailers to have the best selection of products this holiday season, but views are split, with this channel also getting the highest vote for worst selection / most heavily impacted by shortages. Online is a close second for best selection, and consumers are more confident online retailers will avoid product shortages.

## Expectations for Best/Worst Retailer Product Selection

% of Holiday Gift Shoppers by Retailer



# HOW WILL PRODUCT SHORTAGES IMPACT HOLIDAY SHOPPING PLANS?

To find the products they want, over a third of consumers will start (or have started) holiday shopping earlier this year. They are also willing to be flexible, either by substituting products they cannot find with similar but alternative items, or shopping at a wider retailer set than they would in a normal year. The one thing they won't do: pay a higher price for items in short supply.

## Expected Impact of Product Shortages on Holiday Shopping

% of Holiday Gift Shoppers



Numerator 2021 Quick Pulse Survey 10/25/2021 | Holiday Gift Shoppers (n=368)

Please select any of the following statements that are TRUE for you as it relates to product shortages and holiday gift shopping this year:

Do you expect to complete your holiday gift shopping earlier or later than previous years?

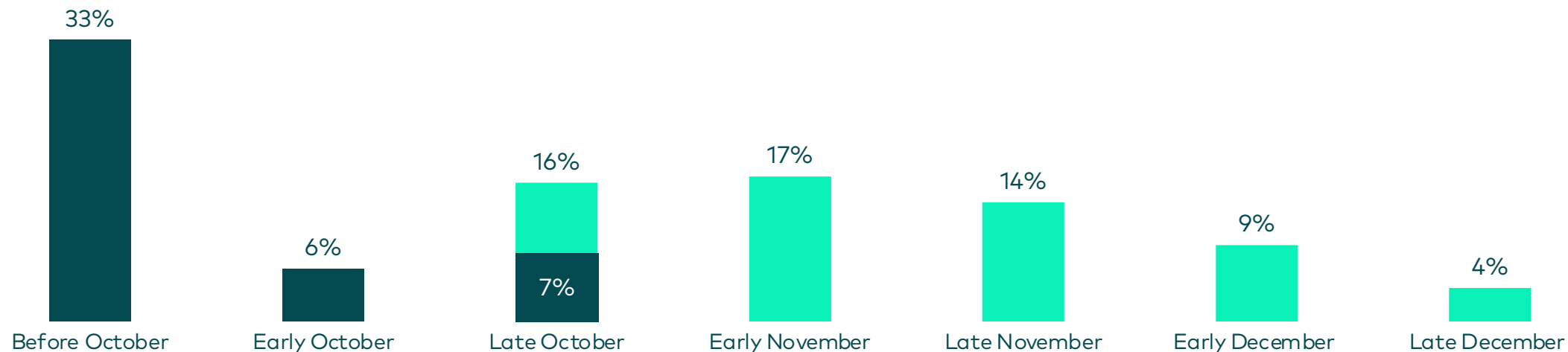
# WHEN DO SHOPPERS PLAN TO START HOLIDAY SHOPPING?

Nearly half of consumers have already started their holiday gift shopping—up compared to previous years. Those who started shopping before October saw the most growth year-over-year. About a third will kick off their gift shopping in November.

## Expected Start Times for Holiday Shopping

% of Holiday Gift Shoppers

■ Already Started ■ Not Yet Started



### Point Change vs. Typical Year



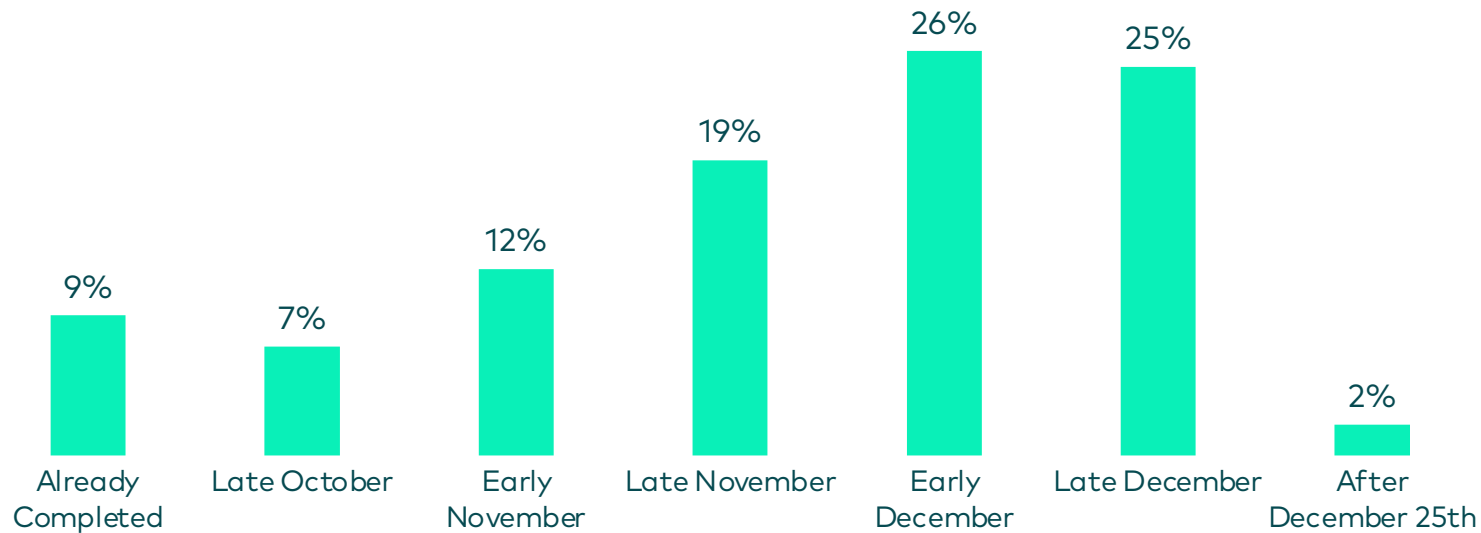
Numerator 2021 Quick Pulse Survey 10/25/2021 | Holiday Gift Shoppers (n=368)  
 When did you start / do you plan to start shopping / for holiday gifts this year?  
 When do you typically begin shopping for holiday gifts in an average year?

## WHEN WILL SHOPPERS COMPLETE THEIR SHOPPING?

Although many shoppers have kicked off their holiday shopping, most don't expect to finish until December. Nearly 1-in-10 have already completed their shopping for the holiday season as of mid-October.

### Expected Timing to Complete Holiday Shopping

% of Holiday Gift Shoppers



# 25%

Of shoppers say they'll complete their shopping earlier than they would in a typical year

# 12%

Will complete their shopping later than they would in a typical year

Numerator 2021 Quick Pulse Survey 10/25/2021 | Holiday Gift Shoppers (n=368)

When do you expect to COMPLETE your holiday gift shopping this year?

Do you expect to complete your holiday gift shopping earlier or later than you do in a typical year?



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