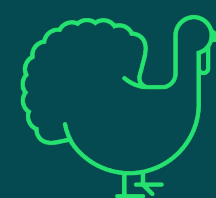




2021 HOLIDAY CONSUMER INTENTIONS

FALL & WINTER HOLIDAYS

Halloween • Thanksgiving • Christmas • New Year's Eve



WHAT'S INCLUDED?

Numerator's Q4 Holiday Intentions survey was fielded to 5,092 Numerator OmniPanelists from 9/15/21 to 9/17/21. All respondents were asked which upcoming Fall & Winter holidays they typically celebrate and were then asked more in-depth about 2021 celebration plans for one of their selected holidays.

HOLIDAYS COVERED

Halloween	page 4
Thanksgiving	page 12
Christmas	page 19
New Year's Eve	page 28



UPCOMING HOLIDAYS OVERVIEW

While most consumers expect to celebrate at least one upcoming holiday normally & free of COVID-19 restrictions, more than half expect some sort of COVID impact for any given holiday. 7% will scale back despite having celebrated normally earlier this year, and another 14% have not and will not celebrate normally until 2022 or later.

75%

Of consumers have celebrated at least one holiday normally so far in 2021.

80%

Expect to celebrate one or more upcoming fall/winter holidays normally.

68%

Have celebrated normally already and will continue to celebrate upcoming holidays normally.

7%

Have celebrated normally already but will not celebrate any upcoming holidays normally.

11%

Will be celebrating normally for the first time this fall/winter.

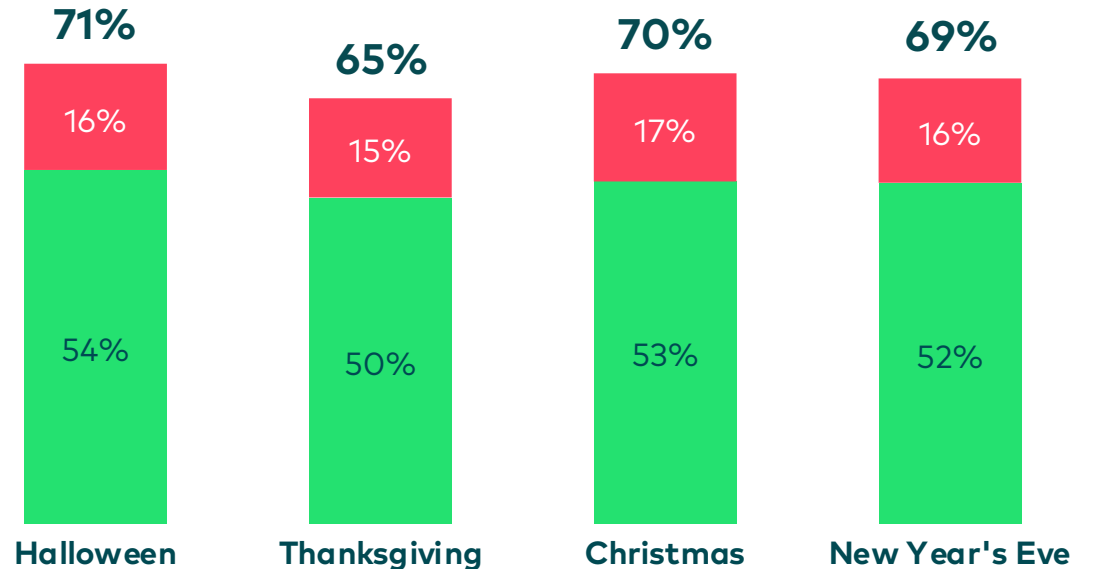
14%

Have not and will not celebrate any 2021 holidays normally.

Expected COVID-19 Impact

% of Celebrators expecting Slight or Significant Impact

■ Slight Impact ■ Significant Impact



69%

OF HOUSEHOLDS CELEBRATE

HALLOWEEN

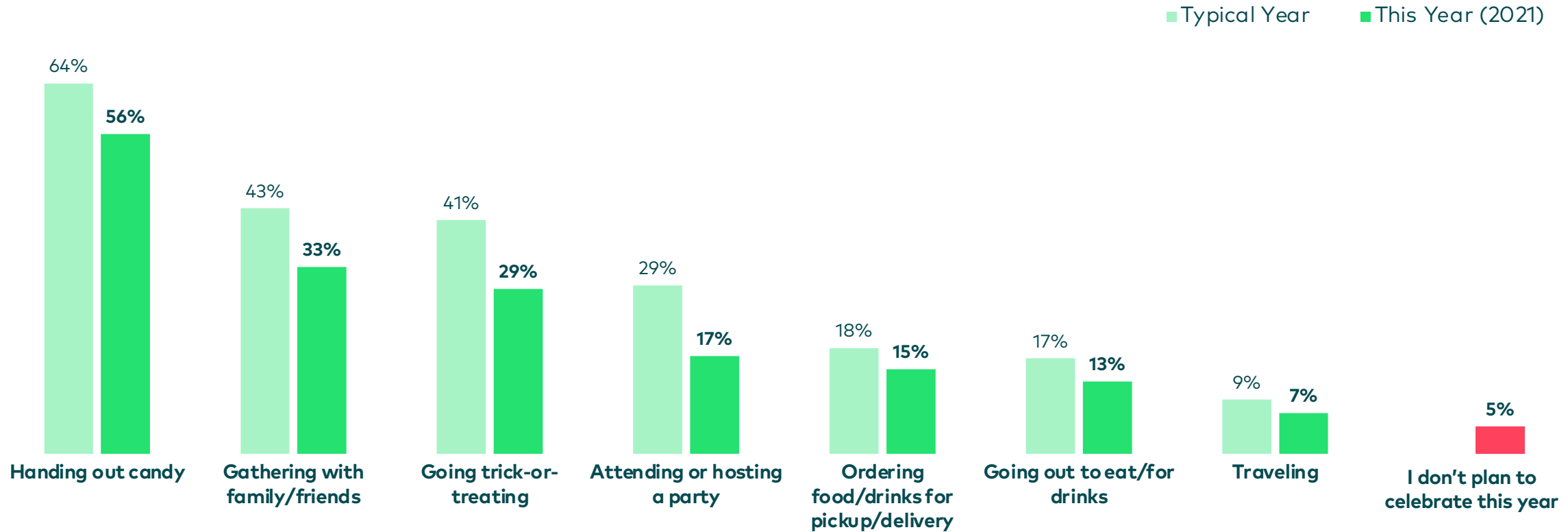


HOW WILL CONSUMERS CELEBRATE HALLOWEEN 2021?

Overall plans to celebrate Halloween are down this year, with specific activities like gathering with friends & family, going trick-or-treating, or attending / hosting a party all down at least 10 percentage points versus typical years.

Halloween Celebration Plans

% of Halloween Celebrators



Numerator 2021 Q4 Holiday Survey 09/17/2021 | Halloween celebrators (n=1,018)

How have you typically celebrated Halloween in the past / How do you plan to celebrate this year?

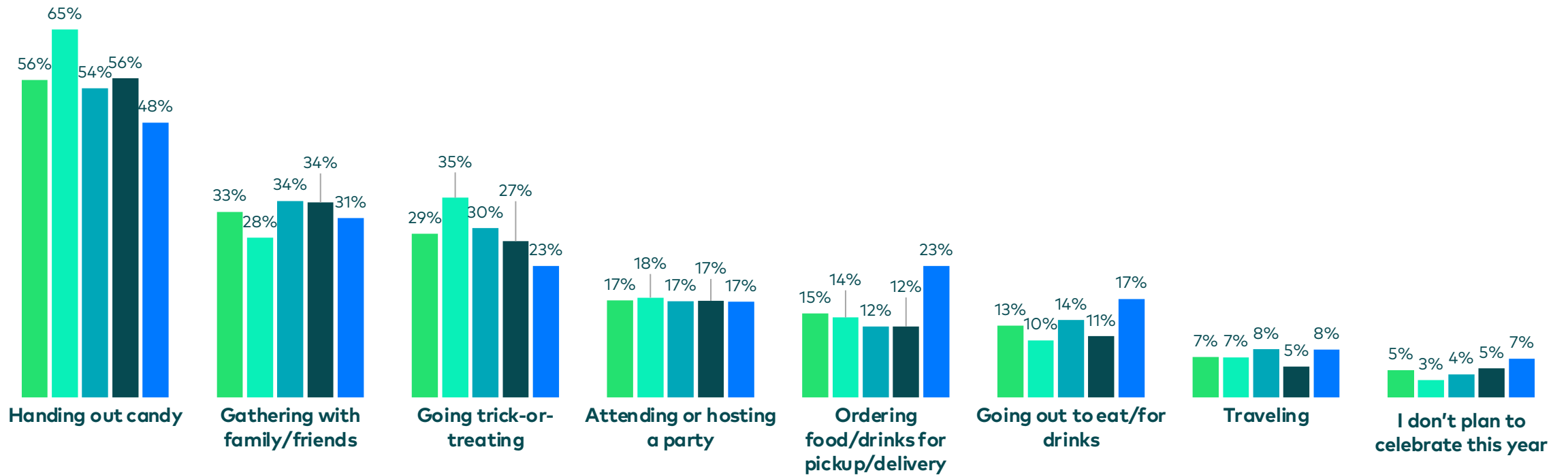
REGIONAL INSIGHTS: HALLOWEEN CELEBRATION PLANS

Consumers in the Northeast have the highest likelihood of handing out candy and going trick-or-treating this Halloween, while Western consumers are significantly more likely to order in, eat out, or avoid celebrating altogether.

Halloween Celebration Plans

% of Halloween Celebrators

■ Total ■ Northeast ■ Midwest ■ South ■ West



Numerator 2021 Q4 Holiday Survey 09/17/2021 | Halloween celebrators (n=1,018)
How have you typically celebrated Halloween in the past / How do you plan to celebrate this year?

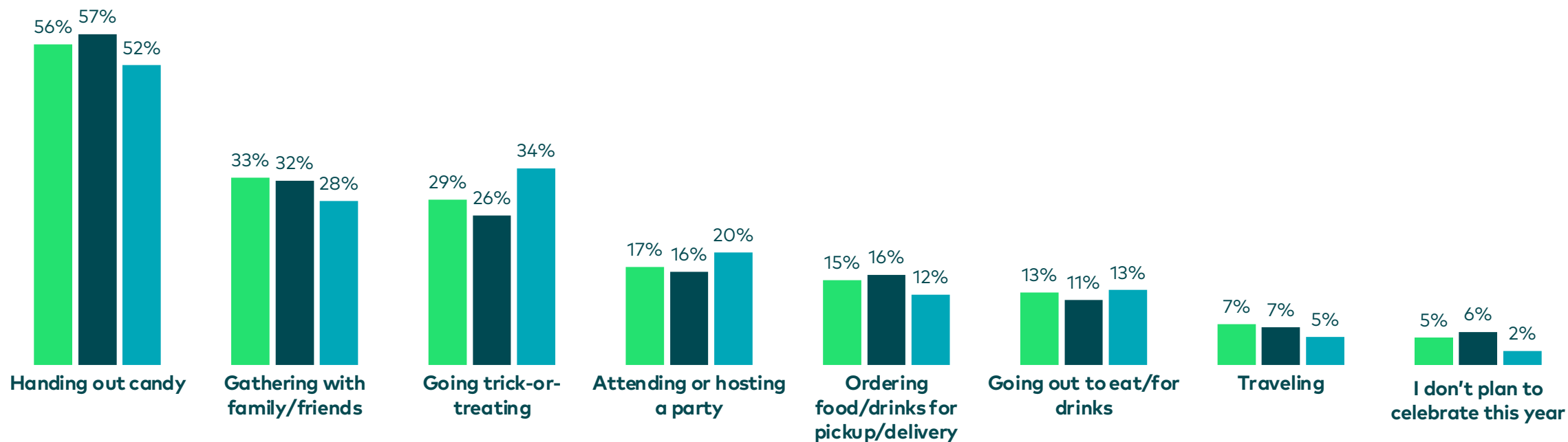
VACCINATION INSIGHTS: HALLOWEEN CELEBRATION PLANS

Consumers vaccinated for COVID-19 are slightly less likely to plan on trick-or-treating this Halloween, while those not planning to get the vaccine are significantly more likely to do so. Vaccinated consumers are also more likely to avoid celebrating altogether.

Halloween Celebration Plans

% of Halloween Celebrators

■ Total ■ Vaccinated ■ Do not plan to get the vaccine



Numerator 2021 Q4 Holiday Survey 09/17/2021 | Halloween celebrators (n=1,018)
How have you typically celebrated Halloween in the past / How do you plan to celebrate this year?

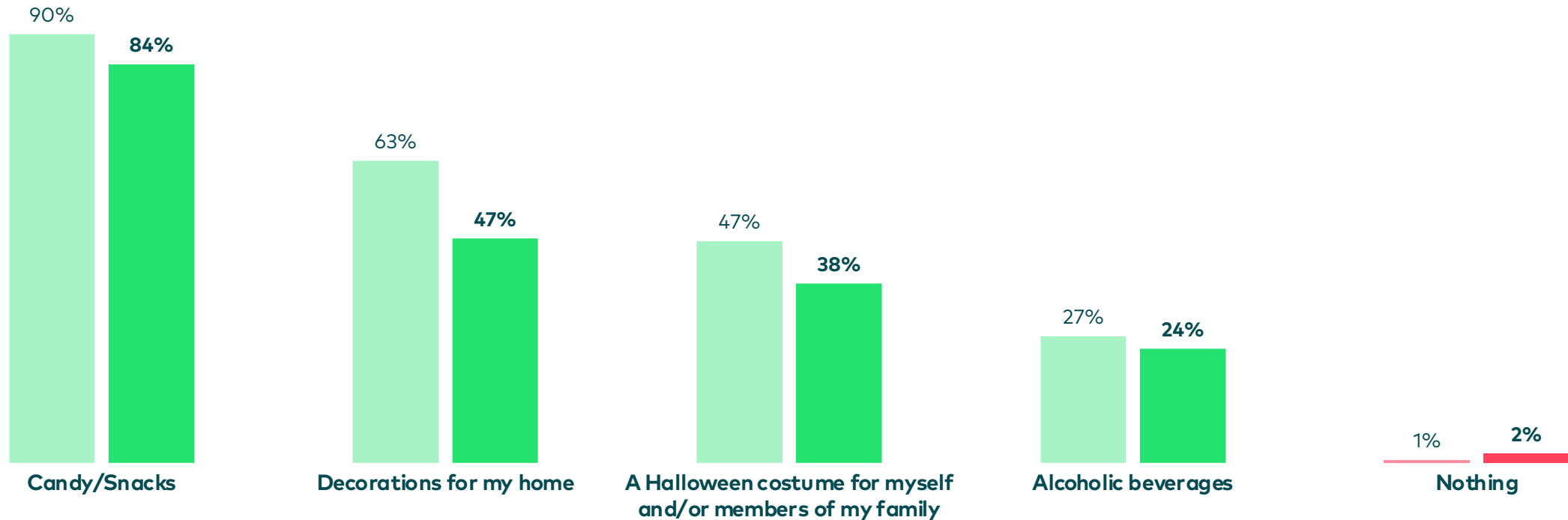
WHAT ARE CONSUMERS BUYING FOR HALLOWEEN?

Similarly to celebrating, intentions to shop for Halloween are down this year versus a typical year. 84% of celebrators expect to buy candy & snacks, down from 90% previously, while decorations, costumes, and alcohol all see declines as well.

Halloween Purchase Intentions

% of Halloween Celebrators

■ Typical Year ■ This Year (2021)

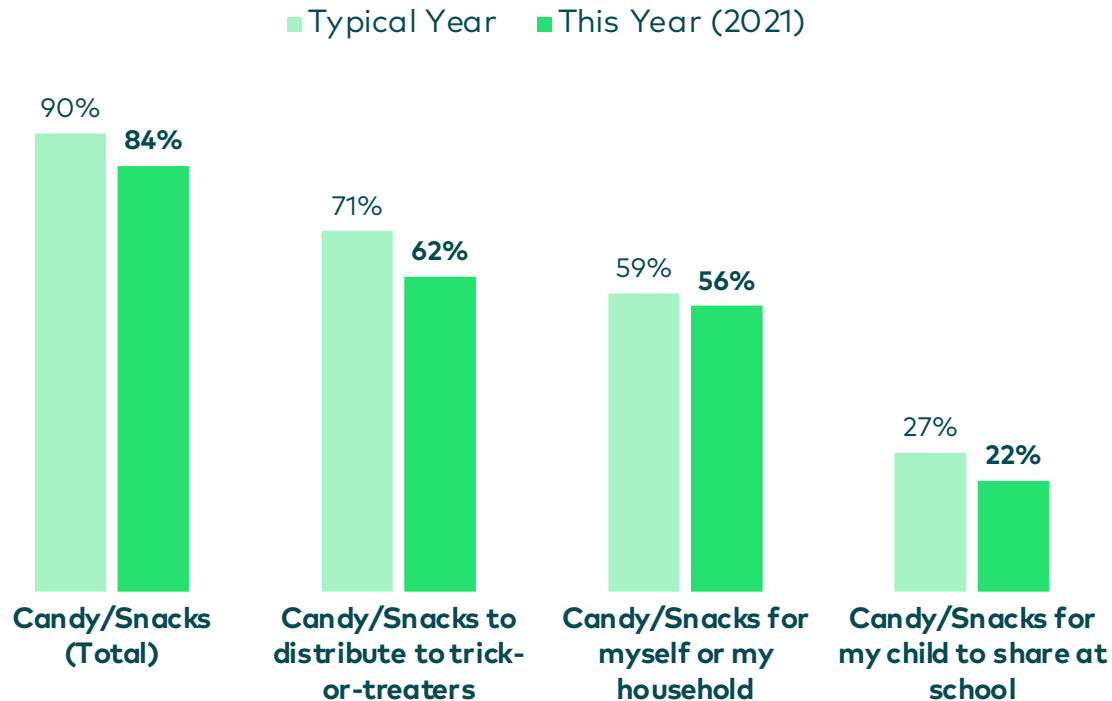


DEEP-DIVE: HALLOWEEN CANDY

While overall intentions to purchase candy are down slightly this Halloween, these declines are primarily driven by those intending to distribute candy to trick-or-treaters or those buying candy for their children to share at school.

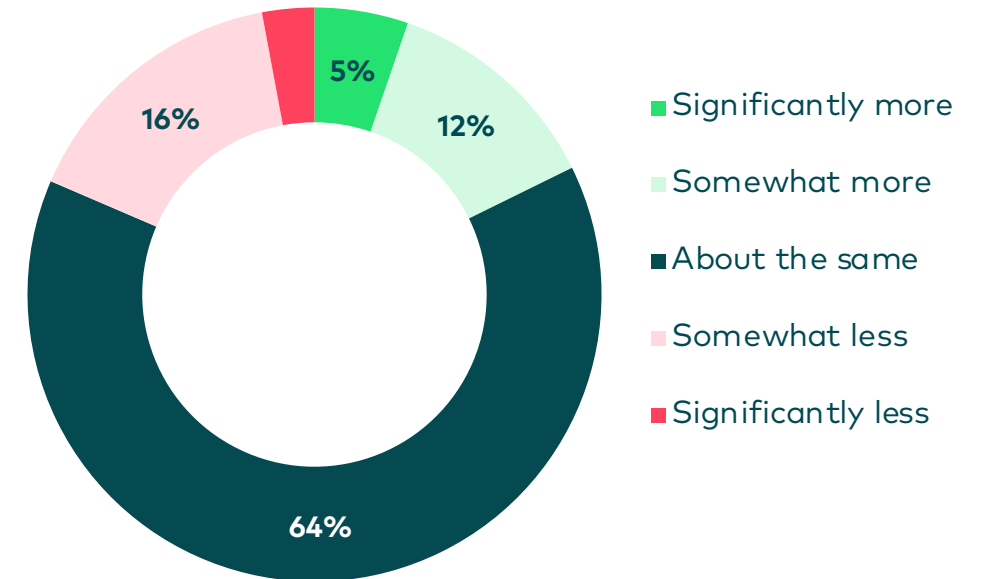
Halloween Candy Buying

% of Halloween Celebrators



2021 Candy vs. Typical Year

% of Halloween Candy Buyers

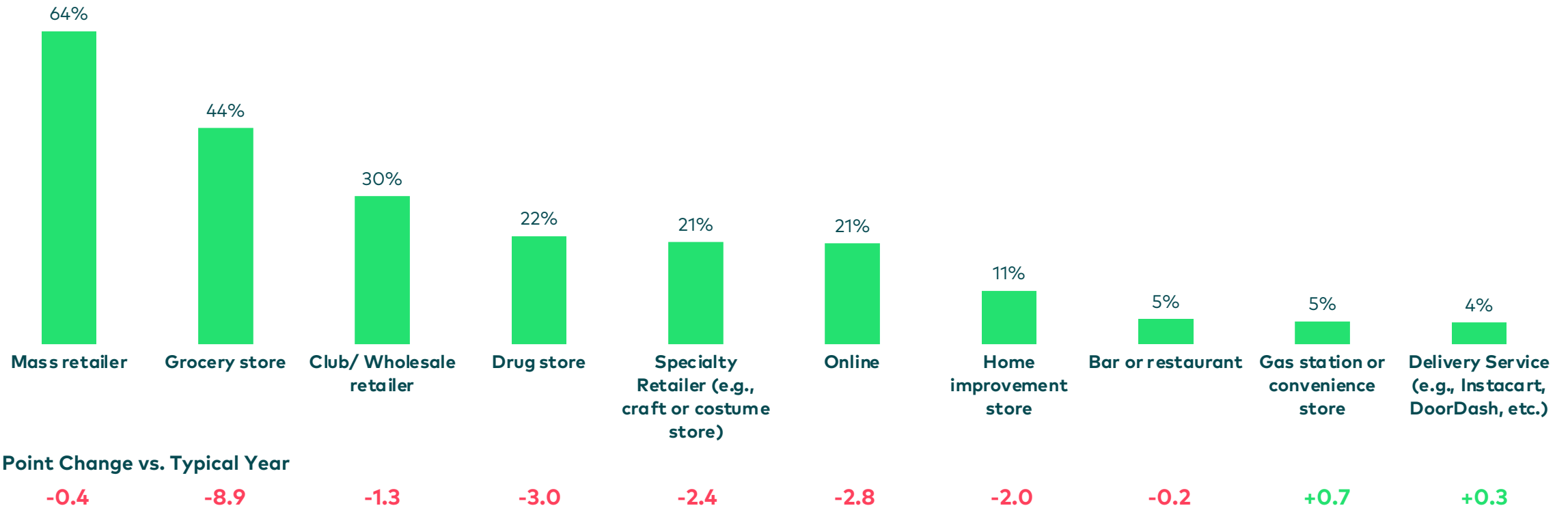


WHERE WILL CONSUMERS MAKE THEIR HALLOWEEN PURCHASES?

While Halloween buying behavior is expected to be down across the board, Grocery and Drug stores show the largest declines in shopping intentions. Gas & Convenience stores and Delivery Services like Instacart and DoorDash show slight increases.

Halloween Purchase Locations

% of Halloween Celebrators



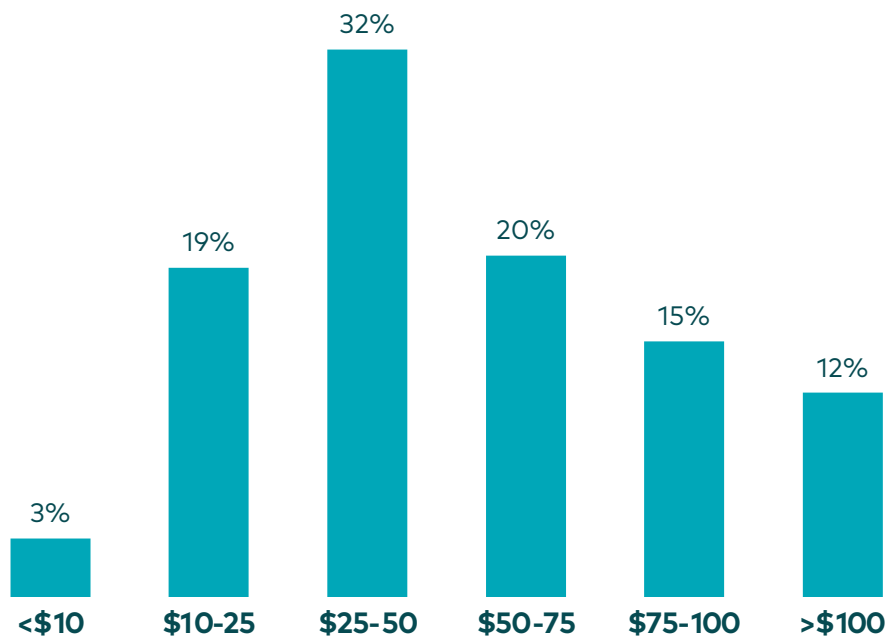
Numerator 2021 Q4 Holiday Survey 09/17/2021 | Halloween celebrators (n=1,018)
Where do you typically purchase / do you expect to purchase items for Halloween this year?

HOW MUCH WILL CONSUMERS SPEND ON HALLOWEEN?

About one-third of shoppers spend \$25-50 on their Halloween items, while just over one-fourth spends \$75+. This year, two-thirds expect to spend about the same as they typically do, while one-fifth expect to spend more.

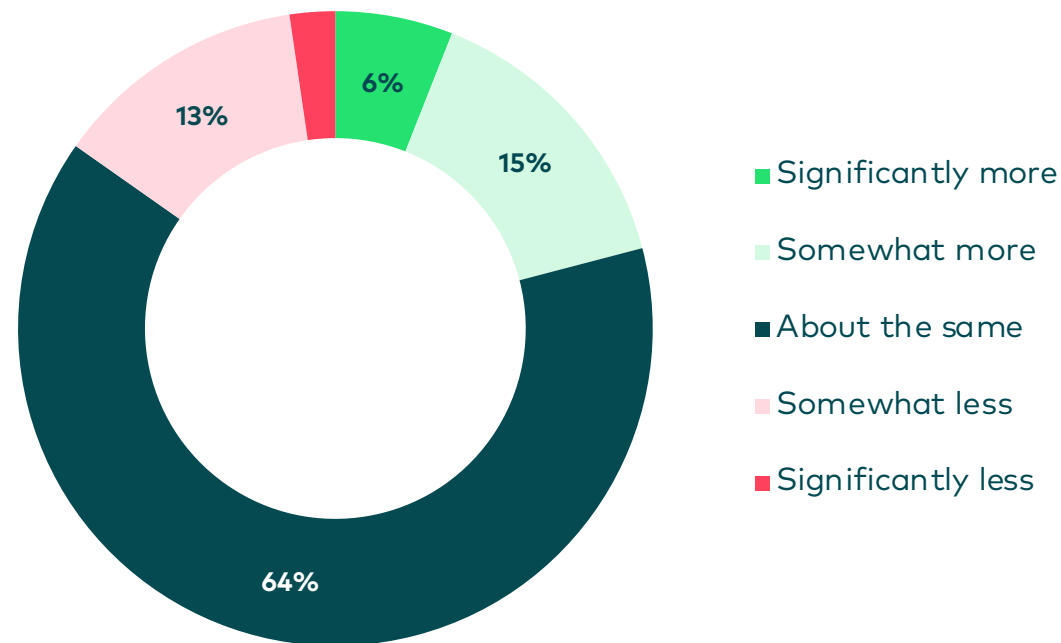
Typical Halloween Spending

% of Halloween Shoppers



2021 Spending vs. Typical Year

% of Halloween Shoppers



92%

OF HOUSEHOLDS CELEBRATE
THANKSGIVING



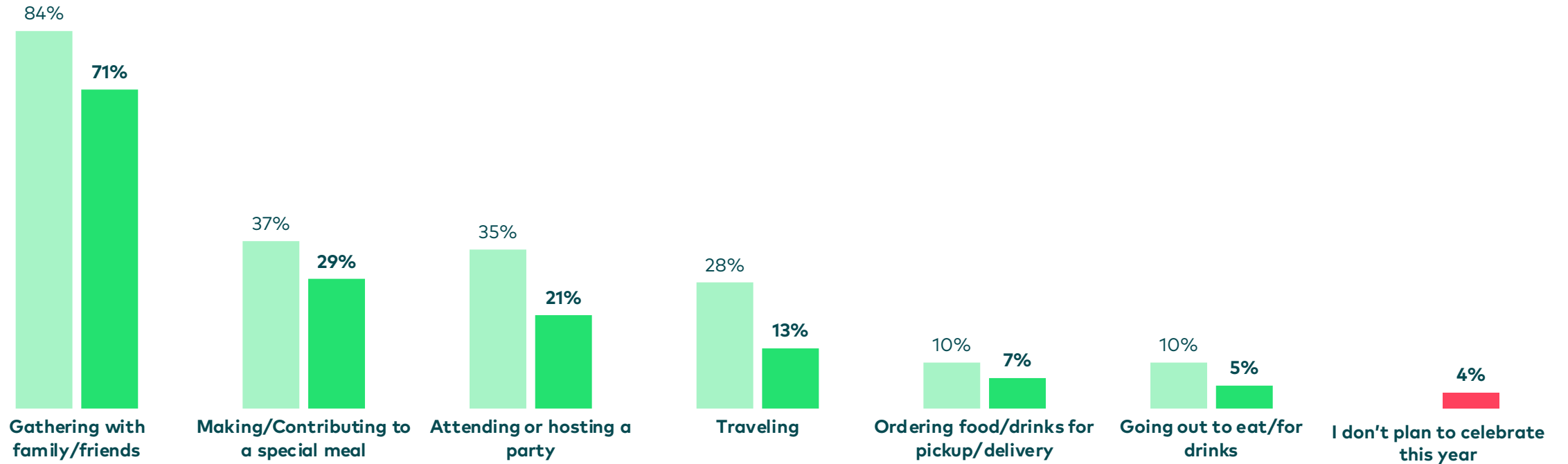
HOW WILL CONSUMERS CELEBRATE THANKSGIVING 2021?

Thanksgiving celebration plans are muted this year, with travel intentions and party plans cut in half versus a typical year. Overall, 71% of consumers still plan to gather with friends and family to celebrate, down 13 points from previous years.

Thanksgiving Celebration Plans

% of Thanksgiving Celebrators

■ Typical Year ■ This Year (2021)



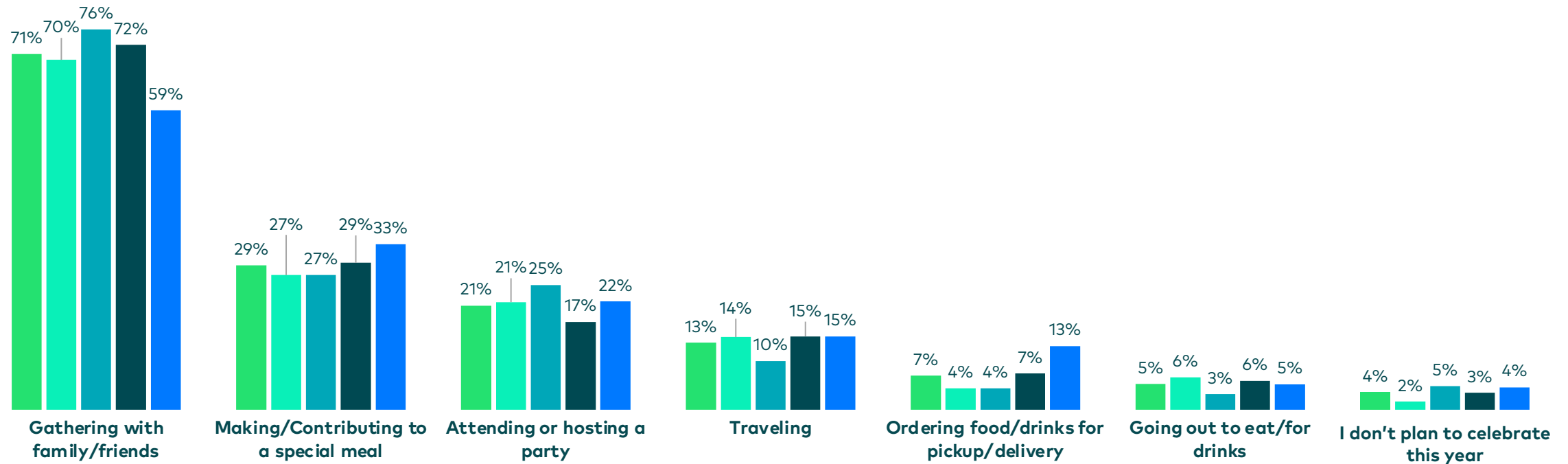
REGIONAL INSIGHTS: THANKSGIVING CELEBRATION PLANS

Midwestern consumers are the most likely to gather with friends & family this Thanksgiving and are also the most likely to attend or host a party. Consumers on the West coast are more likely to order in or to make a special meal.

Thanksgiving Celebration Plans

% of Thanksgiving Celebrators

■ Total ■ Northeast ■ Midwest ■ South ■ West



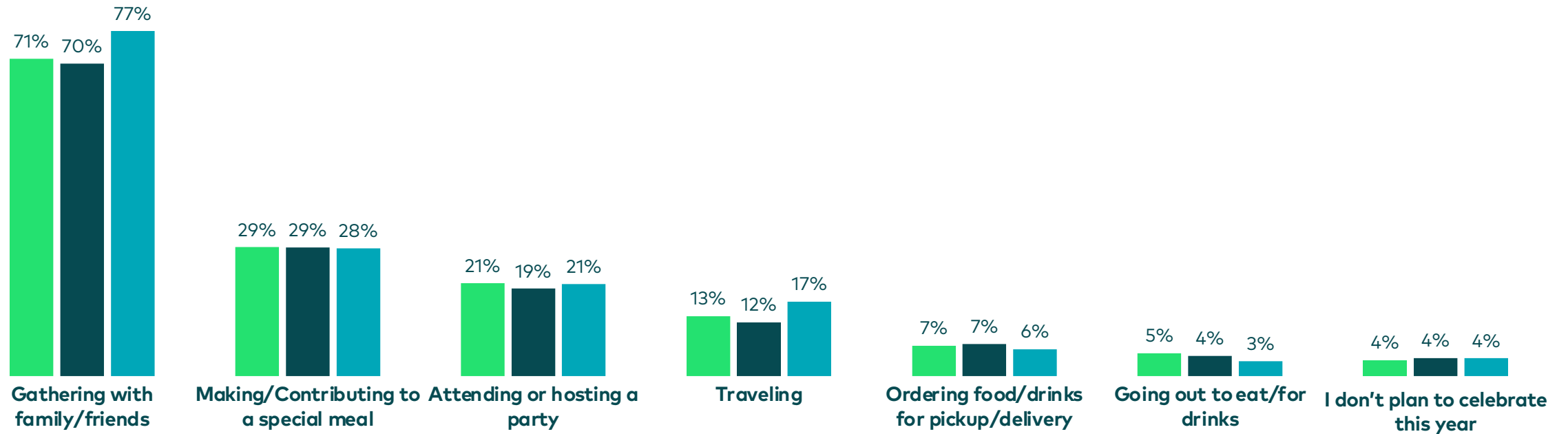
VACCINATION INSIGHTS: THANKSGIVING CELEBRATION PLANS

Thanksgiving celebrations don't vary significantly between vaccinated and unvaccinated individuals, though those not planning to get the vaccine have a slightly higher likelihood of gathering with friends & family or traveling this Thanksgiving.

Thanksgiving Celebration Plans

% of Thanksgiving Celebrators

■ Total ■ Vaccinated ■ Do not plan to get the vaccine



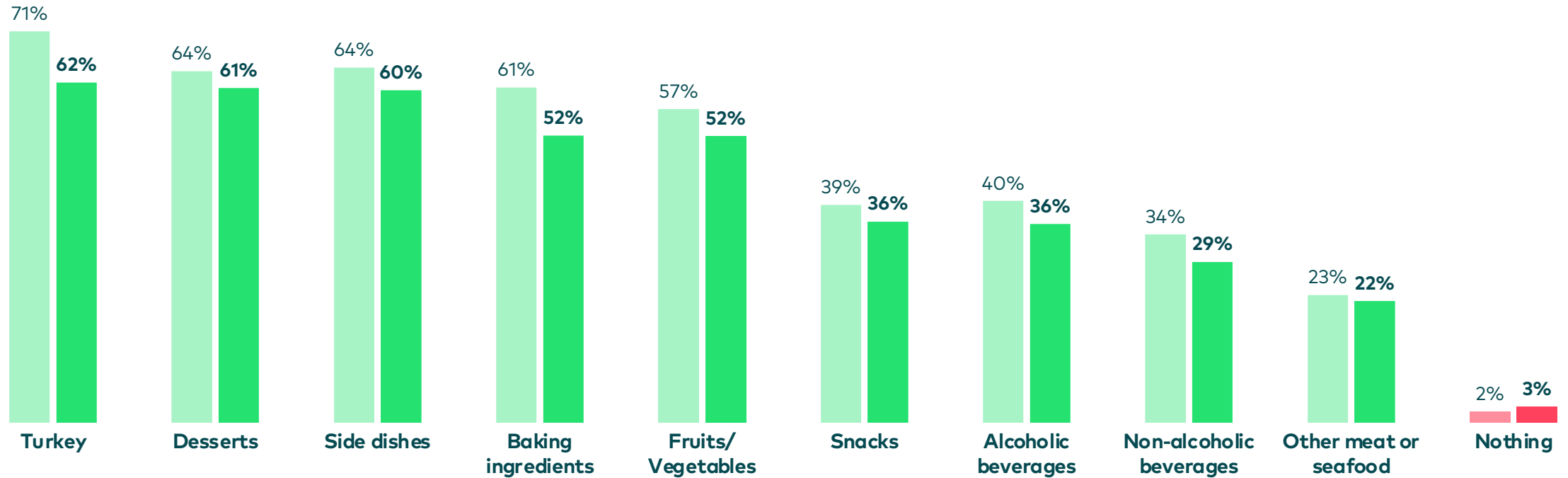
WHAT ARE CONSUMERS BUYING FOR THANKSGIVING?

Thanksgiving purchase intentions are down across the board, with Turkey and Baking Ingredients seeing the most significant declines of nearly 10 percentage points. Desserts, Snacks, Alcohol and other Meat & Seafood see smaller declines.

Thanksgiving Purchase Intentions

% of Thanksgiving Celebrators

■ Typical Year ■ This Year (2021)

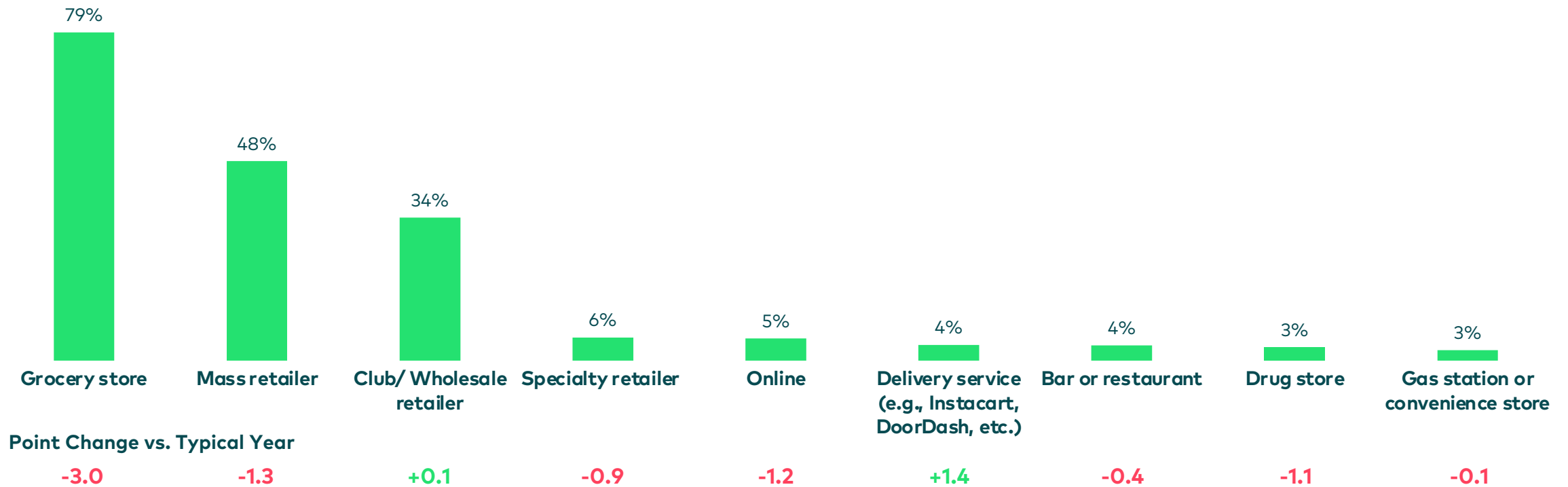


WHERE WILL CONSUMERS MAKE THEIR THANKSGIVING PURCHASES?

Club & Wholesale retailers and Delivery Services like Instacart and DoorDash stand to benefit this Thanksgiving, while intentions to buy Thanksgiving items at Grocery stores, Mass retailers or Online are down slightly compared to prior years.

Thanksgiving Purchase Locations

% of Thanksgiving Celebrators



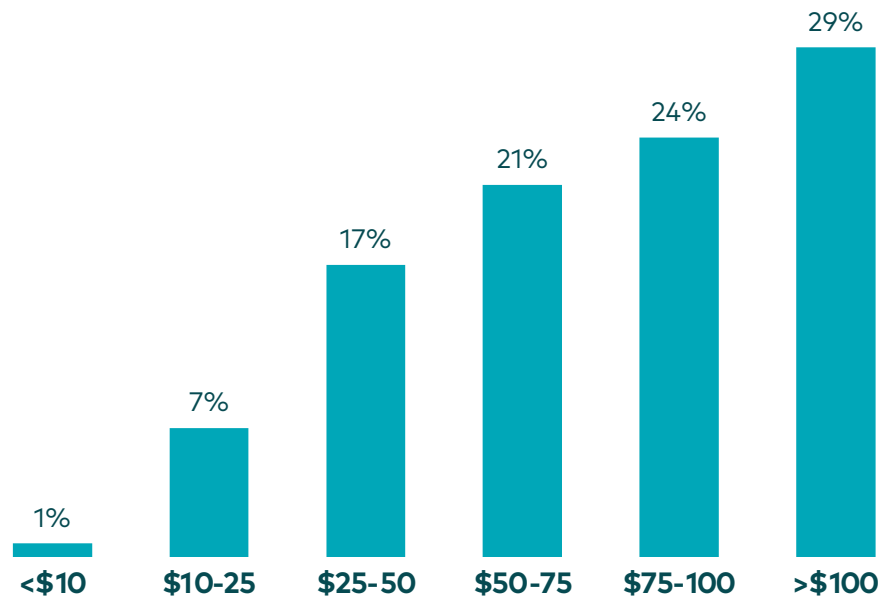
Numerator 2021 Q4 Holiday Survey 09/17/2021 | Thanksgiving celebrators (n= 1,021)
 Where do you typically purchase / do you expect to purchase items for Thanksgiving this year?

HOW MUCH WILL CONSUMERS SPEND ON THANKSGIVING?

Over half of consumers spend \$75+ on their Thanksgiving celebrations, with nearly a third spending \$100+. This year, two-thirds of consumers expect to spend the same as they have in the past, while one-fifth expect to spend more.

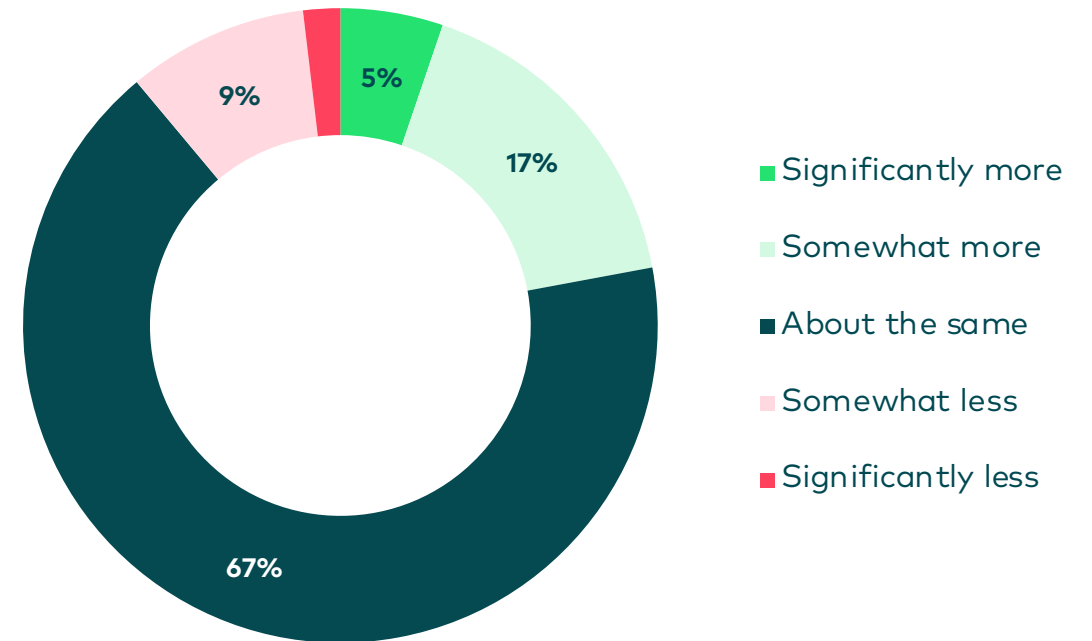
Typical Thanksgiving Spending

% of Thanksgiving Shoppers



2021 Spending vs. Typical Year

% of Thanksgiving Shoppers



94%

OF HOUSEHOLDS CELEBRATE

CHRISTMAS



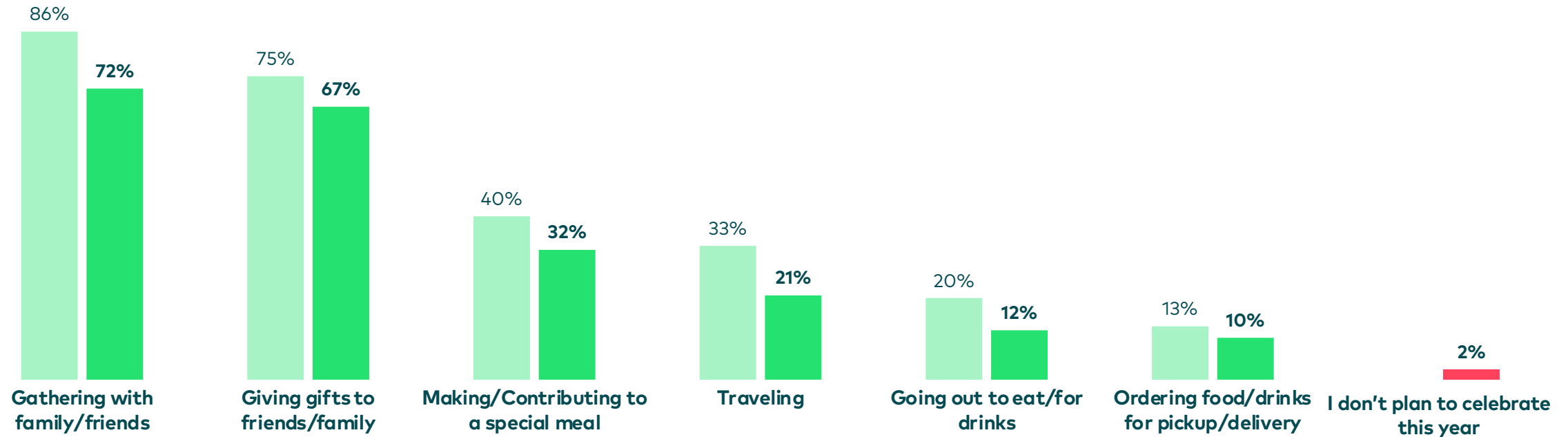
HOW WILL CONSUMERS CELEBRATE CHRISTMAS 2021?

Consumers will be less likely to gather this Christmas, with only 72% planning to get together with friends & family compared to 86% in past years. Intentions to travel, eat out, and order in are all down as well, pointing toward a simple Christmas for many.

Christmas Celebration Plans

% of Christmas Celebrators

■ Typical Year ■ This Year (2021)



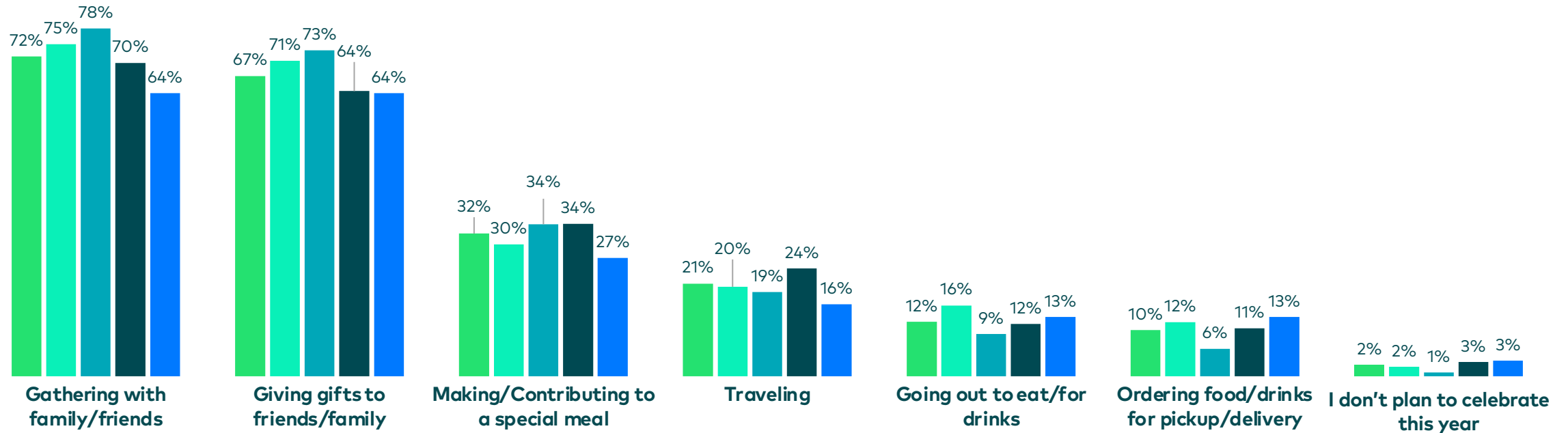
REGIONAL INSIGHTS: CHRISTMAS CELEBRATION PLANS

Regionally, Midwest consumers are more likely to gather with friends & family and to give gifts this Christmas season. Consumers from the Southern US are the most likely to travel, and Northeast consumers the most likely to go out to eat.

Christmas Celebration Plans

% of Christmas Celebrators

■ Total ■ Northeast ■ Midwest ■ South ■ West



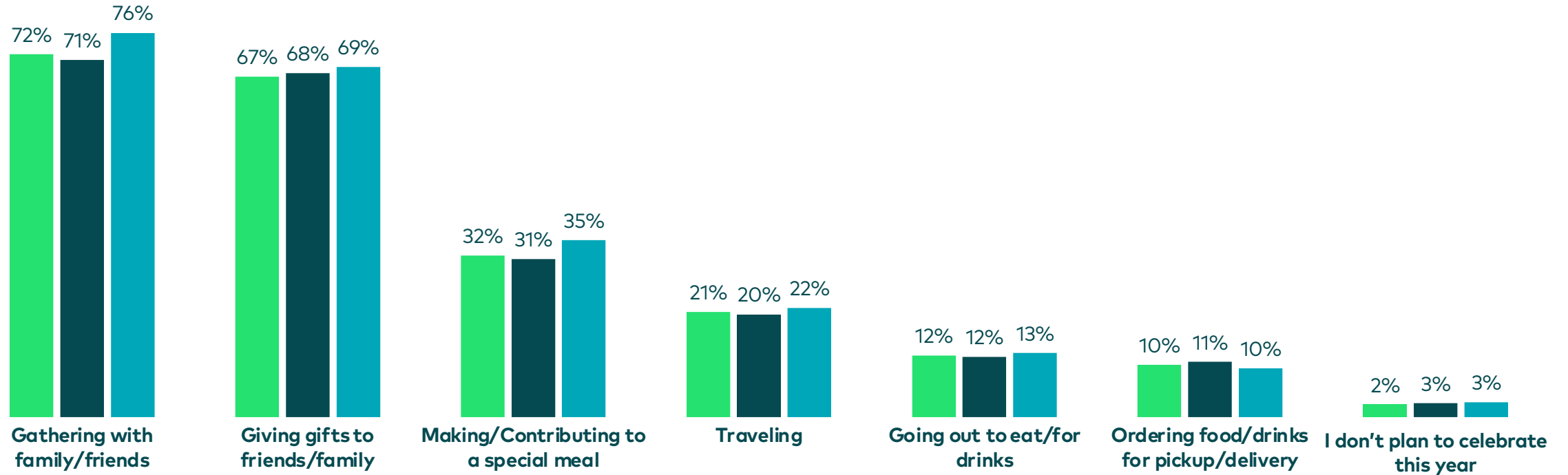
VACCINATION INSIGHTS: CHRISTMAS CELEBRATION PLANS

Consumers not planning to get the COVID-19 vaccine are slightly more likely to participate in Christmas celebrations, particularly gathering with family & friends and making or contributing to a special meal.

Christmas Celebration Plans

% of Christmas Celebrators

■ Total ■ Vaccinated ■ Do not plan to get the vaccine

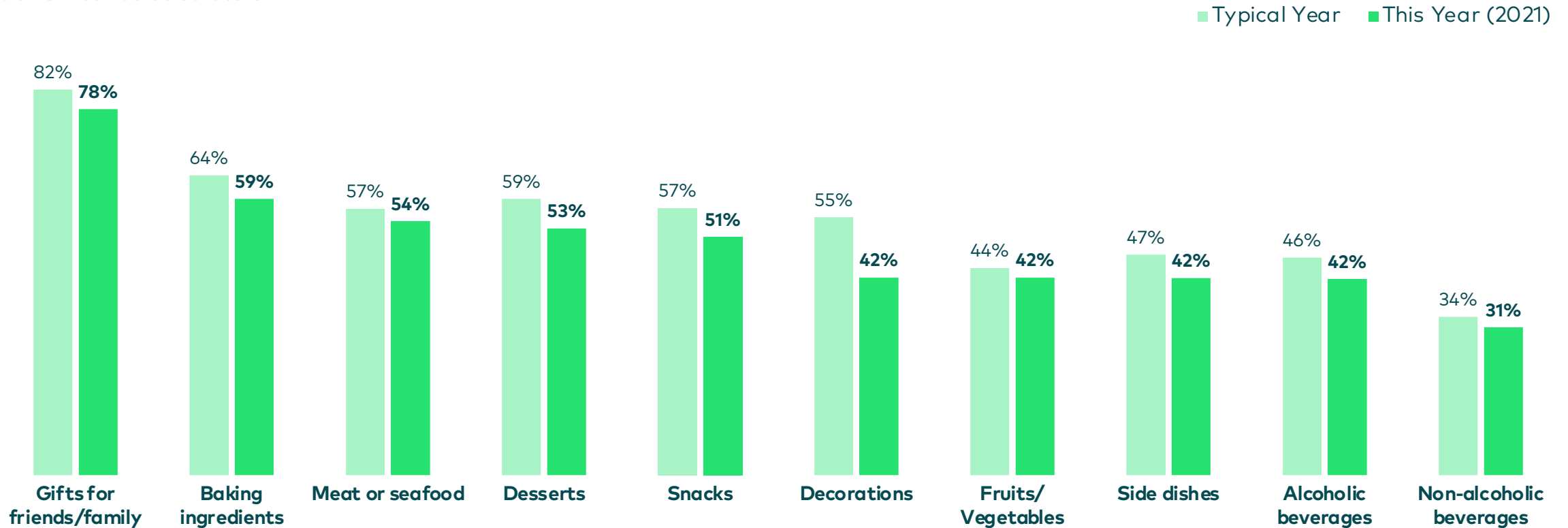


WHAT ARE CONSUMERS BUYING FOR CHRISTMAS?

Plans to purchase food, drinks and gifts for Christmas are down slightly across the board, with no individual category dropping more than 6 percentage points. Intentions to purchase Christmas decorations are down more significantly from 55% to 42%.

Christmas Purchase Intentions

% of Christmas Celebrators

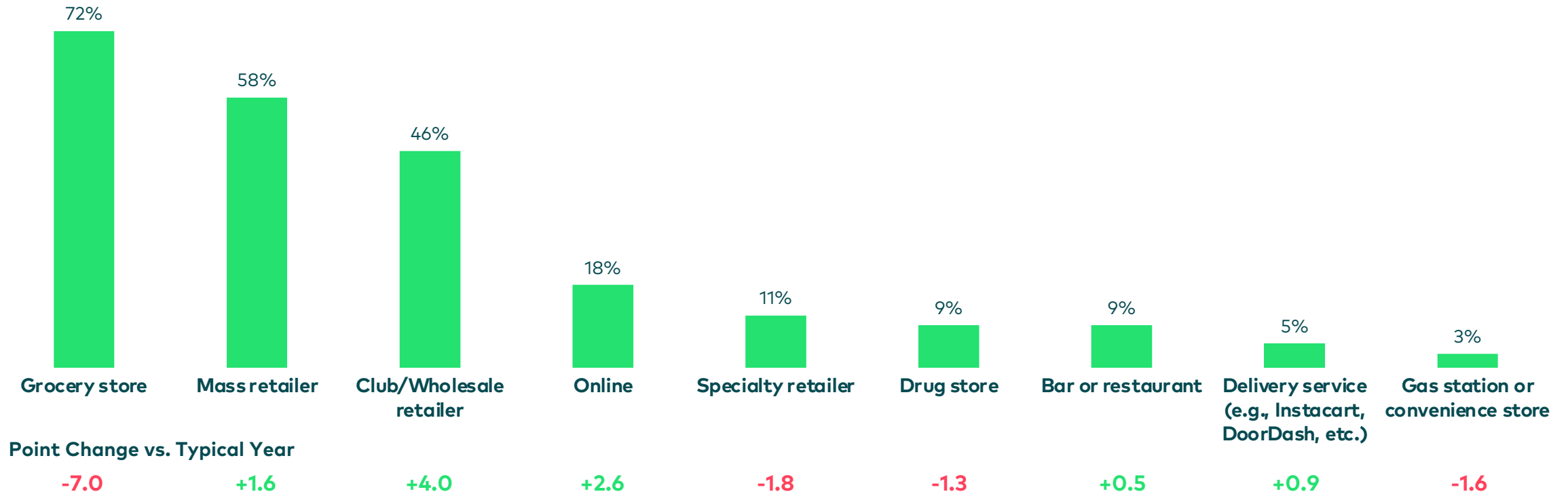


WHERE WILL CONSUMERS BUY FOOD & DRINKS FOR CHRISTMAS?

Most consumers expect to purchase their Christmas food & drinks from Grocery stores, though this channel also sees the largest drop versus prior years. Mass and Club / Wholesale retailers will also be top destinations for Christmas fixings.

Christmas Food & Drink Purchase Locations

% of Christmas Celebrators



Numerator 2021 Q4 Holiday Survey 09/17/2021 | Christmas celebrators (n= 1,014)

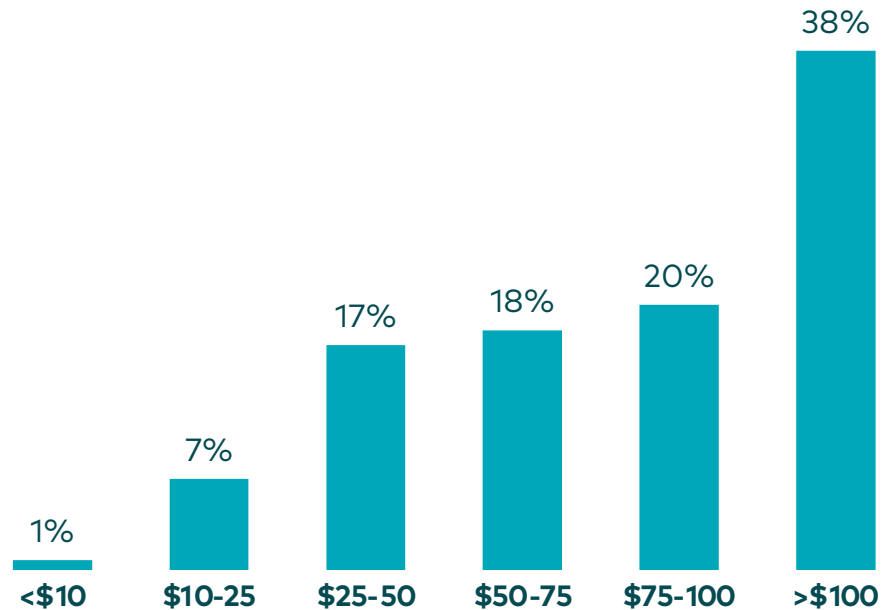
Where do you typically purchase / do you expect to purchase food & drink items for Christmas this year?

HOW MUCH WILL CONSUMERS SPEND ON FOOD & DRINKS FOR CHRISTMAS?

Nearly two-fifths of consumers spend over \$100 on their Christmas food & drinks in a typical year. This year, over two-thirds expect to spend roughly the same amount as they have in the past, with one-fifth expecting to spend more.

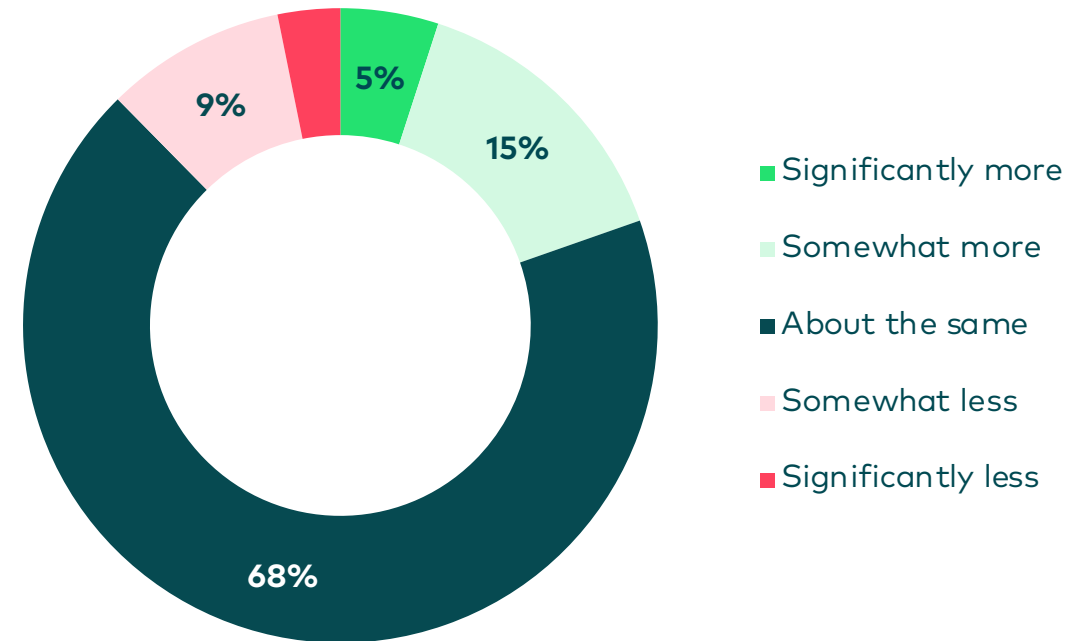
Typical Christmas Food & Drinks Spending

% of Christmas Shoppers



2021 Spending vs. Typical Year

% of Christmas Shoppers

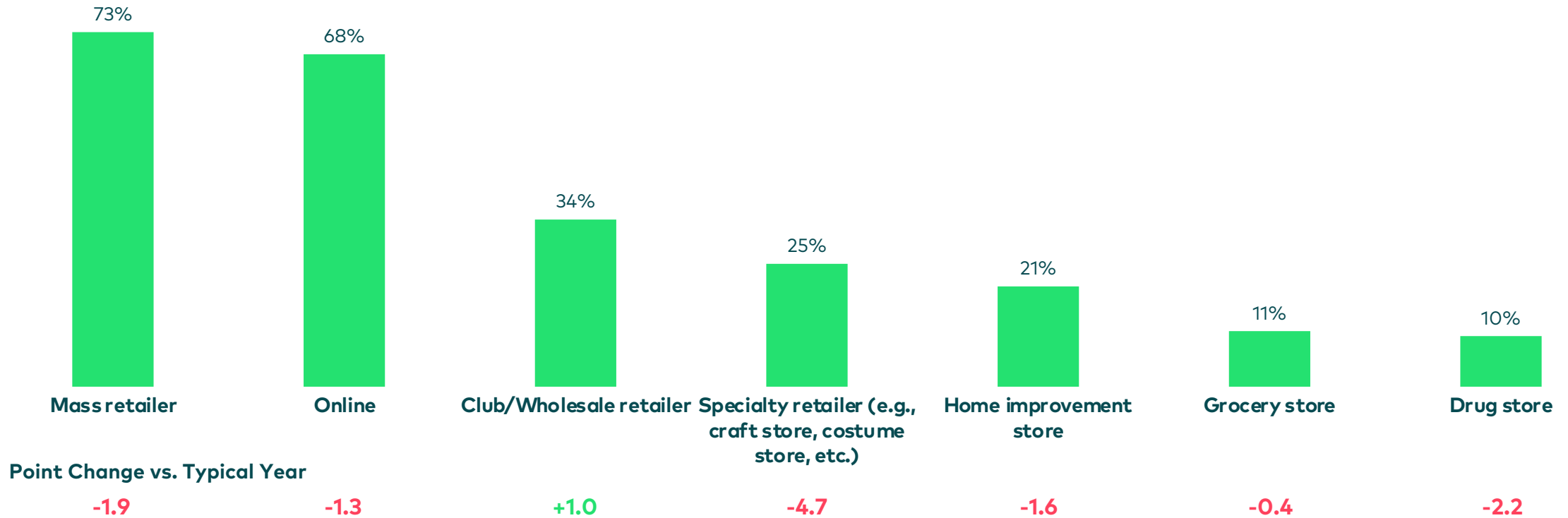


WHERE WILL CONSUMERS BUY THEIR CHRISTMAS GIFTS?

Mass retailers and Online will be the top channels for Christmas gift shopping, with over two-thirds of consumers planning to make purchases in each channel. Club / Wholesale rounds out the top 3 and is also the only channel with an expected increase.

Christmas Gift Purchase Locations

% of Christmas Celebrators



Numerator 2021 Q4 Holiday Survey 09/17/2021 | Christmas celebrators (n= 1,014)
Where do you typically purchase / do you expect to purchase gifts for Christmas this year?

DEEP DIVE: CHRISTMAS GIFT SHOPPING

Most consumers expect to start their Christmas gift shopping during the month of November, though over a third will kick off before then. 30% plan to buy gifts on Black Friday, 25% on Cyber Monday, and 7% on Super Saturday.

Gift Spending

% of Gift Buyers

70%

Of consumers typically spend \$100+ on Christmas gifts

18%

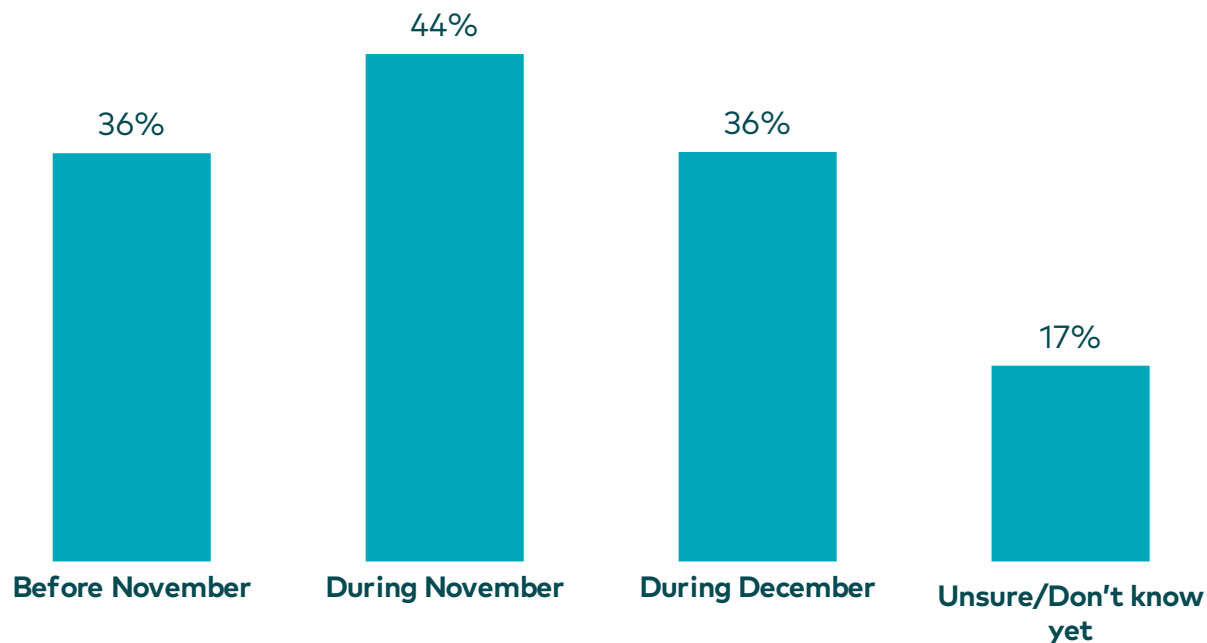
Expect to spend more on gifts this year vs. previous years

70%

Expect to spend about the same on gifts this year vs. previous years

Christmas Gift Timing

% of Gift Buyers who will purchase during given timeframe / day



30%

Black Friday

25%

Cyber Monday

7%

Super Saturday

65%

OF HOUSEHOLDS CELEBRATE
NEW YEAR'S EVE

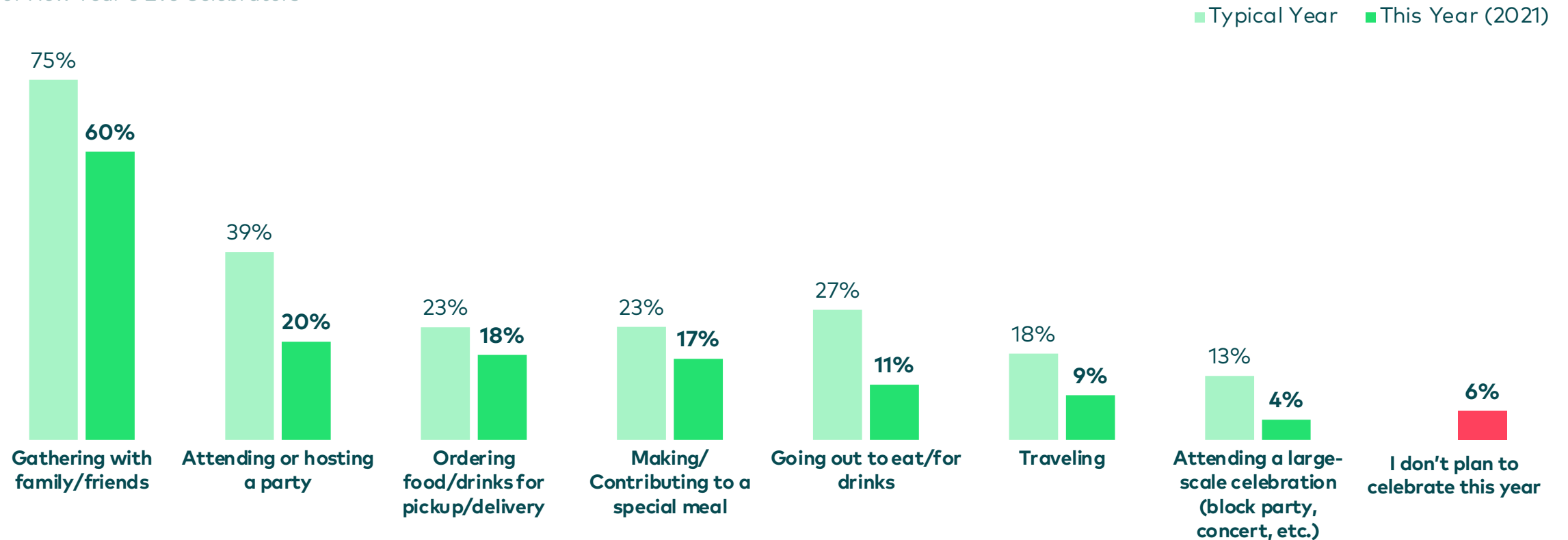


HOW WILL CONSUMERS CELEBRATE NEW YEAR'S EVE 2021?

Plans to celebrate New Year's Eve are down significantly this year, with over 15 point drops for activities like gathering with friends & family, attending or hosting a party, and going out to eat or out for drinks. 6% will avoid celebrating altogether.

New Year's Eve Celebration Plans

% of New Year's Eve Celebrators



Numerator 2021 Q4 Holiday Survey 09/17/2021 | New Year's Eve celebrators (n=1,020)

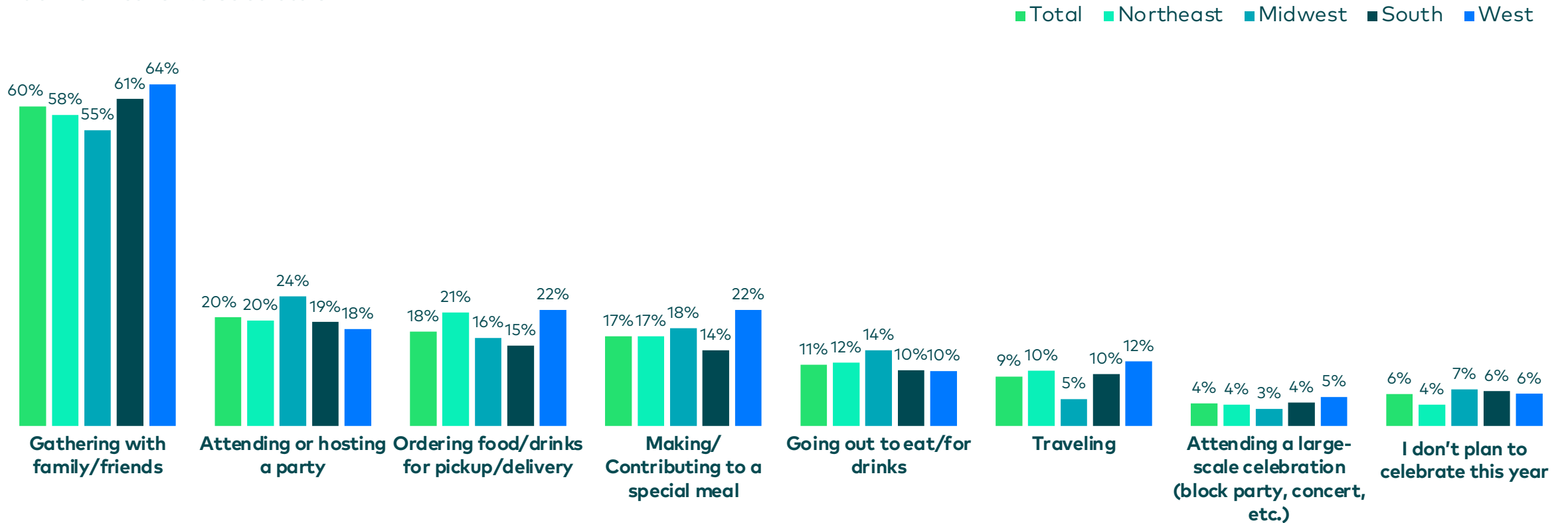
How have you typically celebrated New Year's Eve in the past / How do you plan to celebrate this year?

REGIONAL INSIGHTS: NEW YEAR'S EVE CELEBRATION PLANS

Consumers from the Western US are the most likely to gather with friends & family and to order in for New Year's Eve. Midwestern consumers are the most likely to attend or host a party and are the least likely to travel.

New Year's Eve Celebration Plans

% of New Year's Eve Celebrators



Numerator 2021 Q4 Holiday Survey 09/17/2021 | New Year's Eve celebrators (n=1,020)

How have you typically celebrated New Year's Eve in the past / How do you plan to celebrate this year?

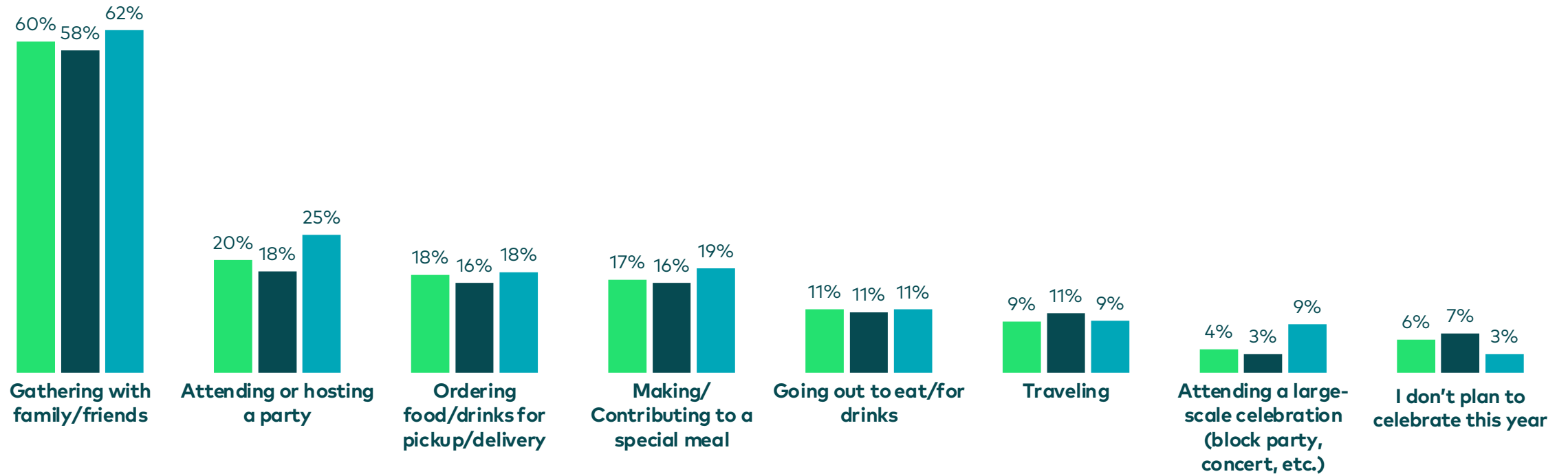
VACCINATION INSIGHTS: NEW YEAR'S EVE CELEBRATION PLANS

Vaccinated consumers are less likely to participate in most New Year's Eve celebrations this year, while unvaccinated individuals are significantly more likely to participate in events like parties or large-scale gatherings.

New Year's Eve Celebration Plans

% of New Year's Eve Celebrators

■ Total ■ Vaccinated ■ Do not plan to get the vaccine

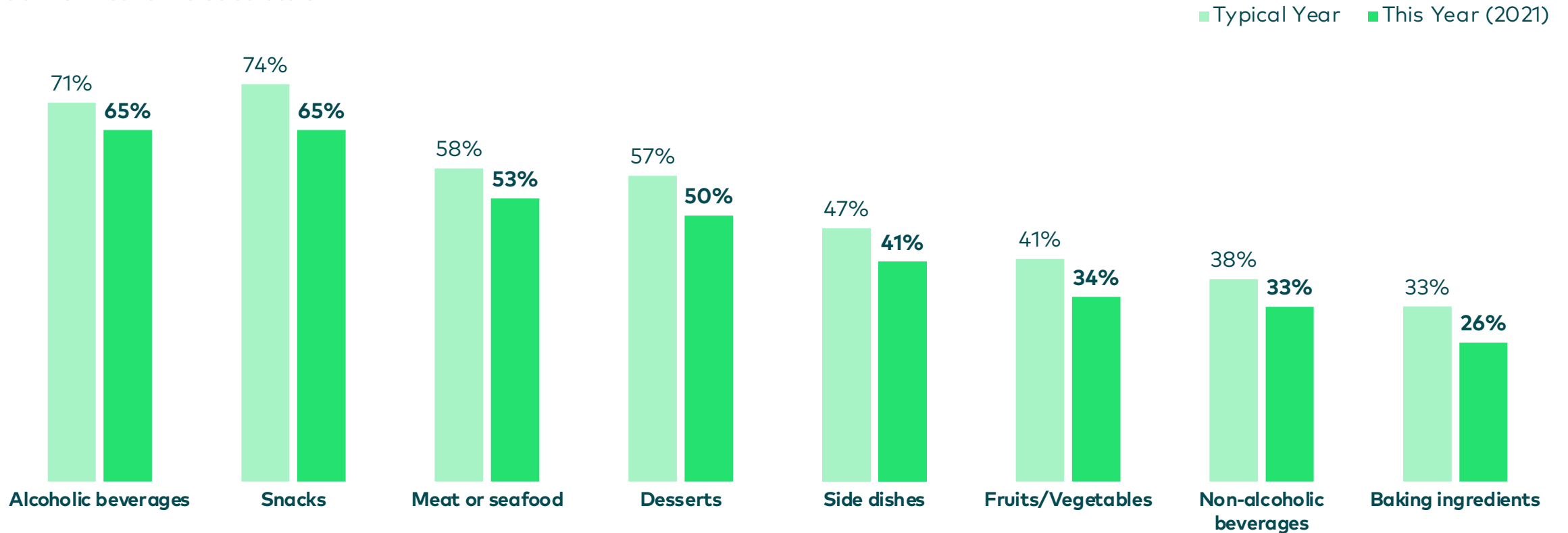


WHAT ARE CONSUMERS BUYING FOR NEW YEAR'S EVE?

Alcohol and Snacks will be the top-purchased items for New Year's Eve celebrations, though both are down slightly from prior years. At least half of NYE celebrators also intend to purchase meat or seafood and desserts.

New Year's Eve Purchase Intentions

% of New Year's Eve Celebrators

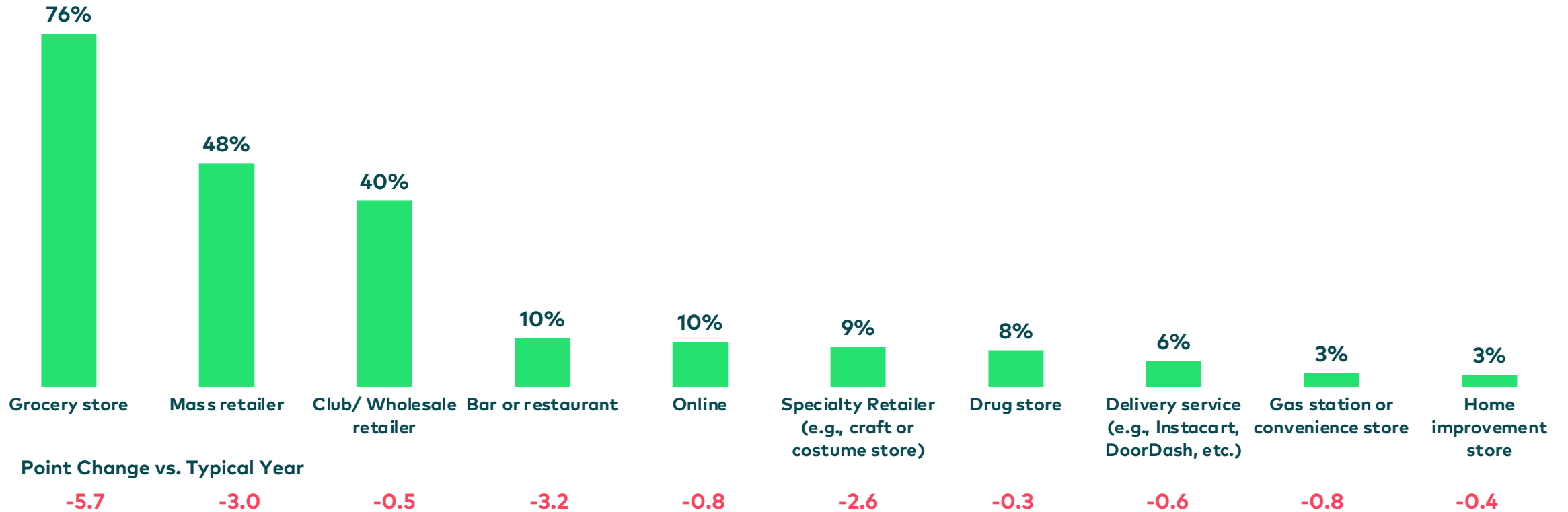


WHERE WILL CONSUMERS MAKE THEIR NEW YEAR'S EVE PURCHASES?

New Year's Eve purchase intentions are down across all channels and delivery types. Three-fourths of consumers expect to make their NYE purchases at Grocery stores, followed by Mass retailers and Club / Wholesale retailers.

New Year's Eve Purchase Locations

% of New Year's Eve Celebrators

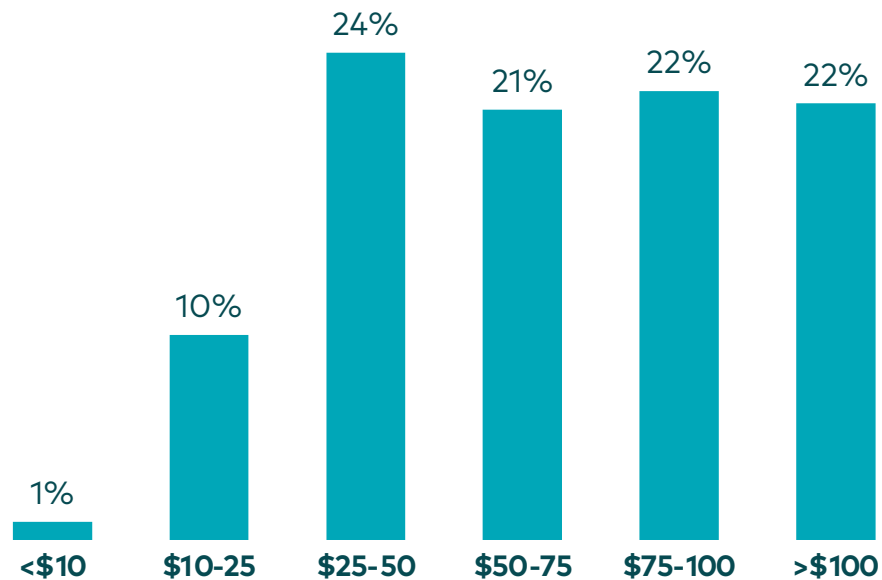


Numerator 2021 Q4 Holiday Survey 09/17/2021 | New Year's Eve celebrators (n= 1,020)
 Where do you typically purchase / do you expect to purchase items for New Year's Eve this year?

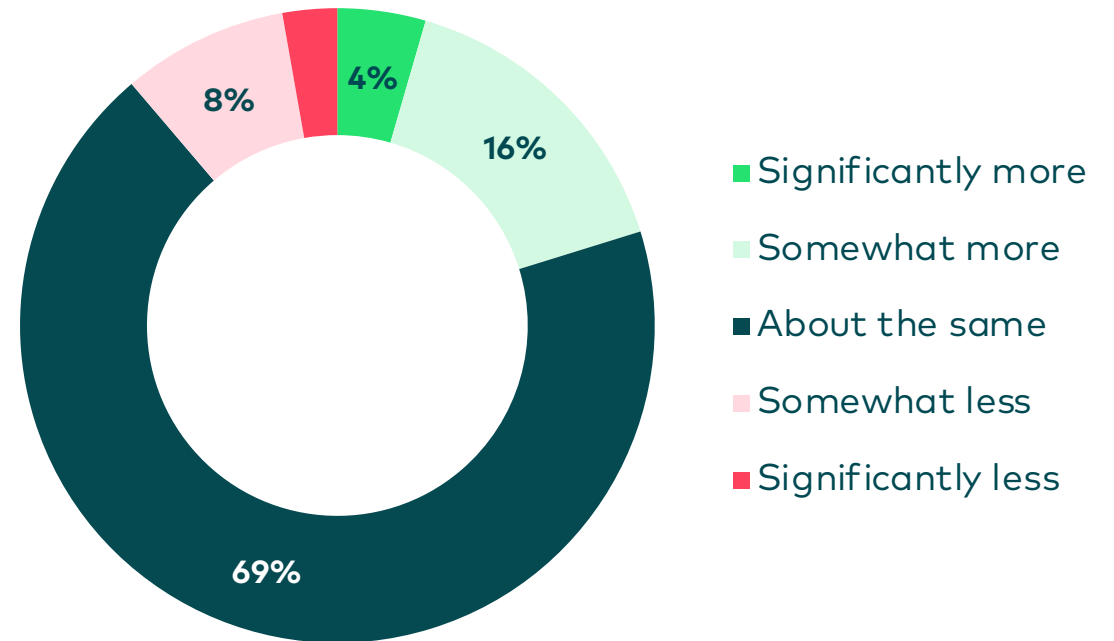
HOW MUCH WILL CONSUMERS SPEND ON NEW YEAR'S EVE?

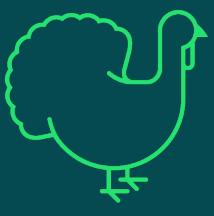
New Year's Eve spending is widely distributed, with most consumers spending anywhere from \$25 to \$100+. This year, nearly seven-tenths plan to spend the same as they have previously, and one-fifth expect to spend more.

Typical New Year's Eve Food & Drinks Spending
% of New Year's Eve Shoppers



2021 Spending vs. Typical Year
% of New Year's Eve Shoppers





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