



2021 Holiday Consumer Intentions

Spring Holidays

Cinco de Mayo • Mother's Day • Memorial Day • Father's Day

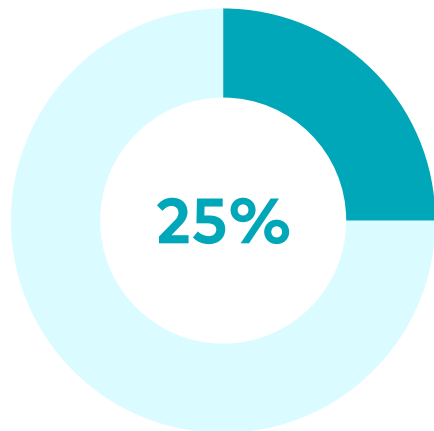


Numerator Holiday Intentions Study

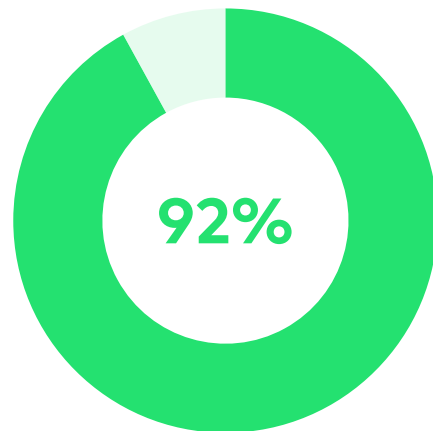
The Q2 Holiday Intentions survey was fielded to 3,964 Numerator OmniPanelists from 4/14/21 to 4/19/21 and covered Cinco de Mayo, Mother's Day, Memorial Day, and Father's Day. All were asked which of the of these holidays they typically celebrated & were then asked more in-depth about 2021 celebration plans for one of their selected holidays.

% OF CONSUMERS WHO TYPICALLY CELEBRATE...

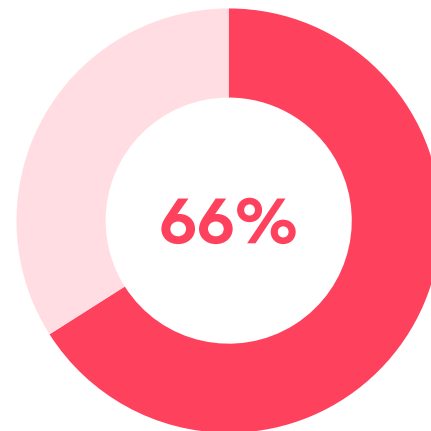
Cinco de Mayo



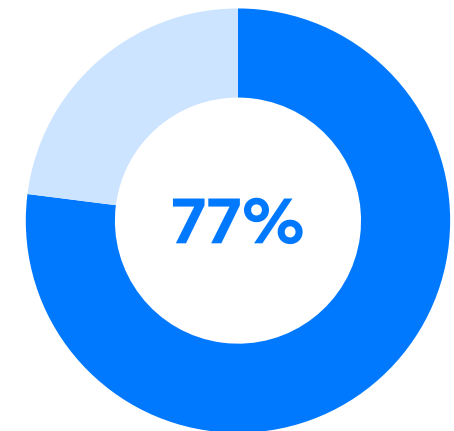
Mother's Day



Memorial Day



Father's Day

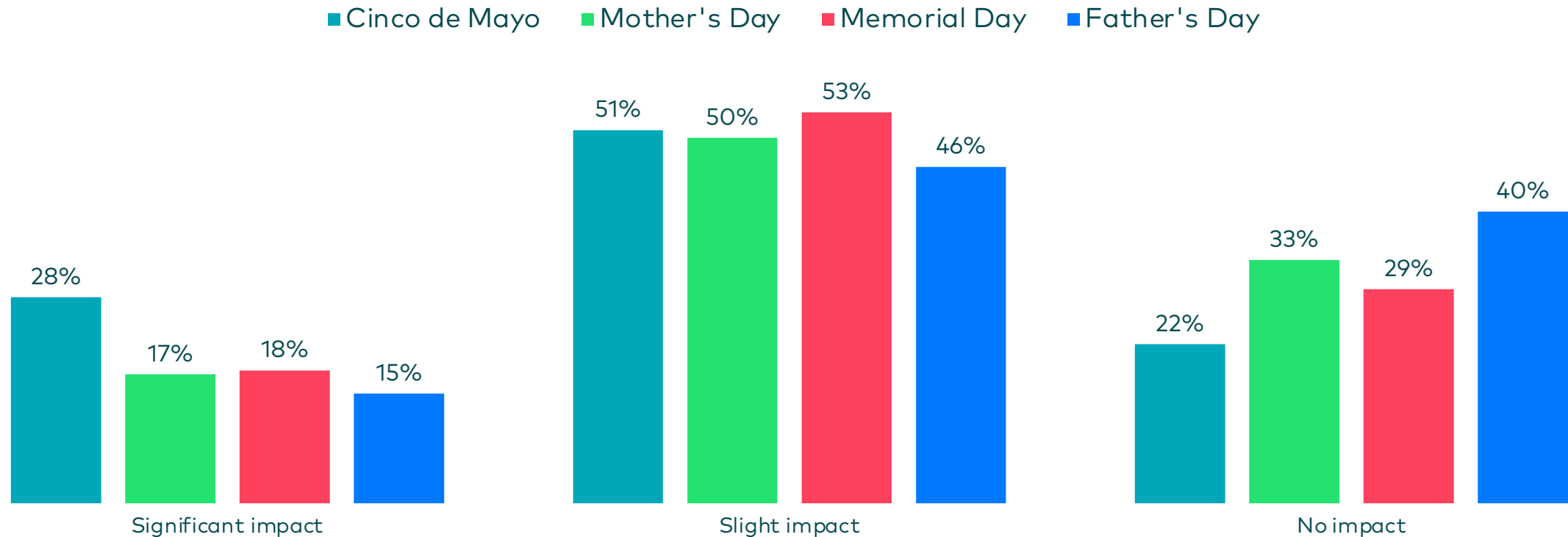


Most consumers expect COVID impacts through spring holidays

About half of consumers expect only a slight impact to the four upcoming spring holidays, with the least expected impact for Father's Day, given its later timing and generally smaller celebrations.

Expected COVID Impact

% of consumers who celebrate each given holiday



Numerator 2021 Q2 Holiday Survey 04/19/2021 (n=3,964)

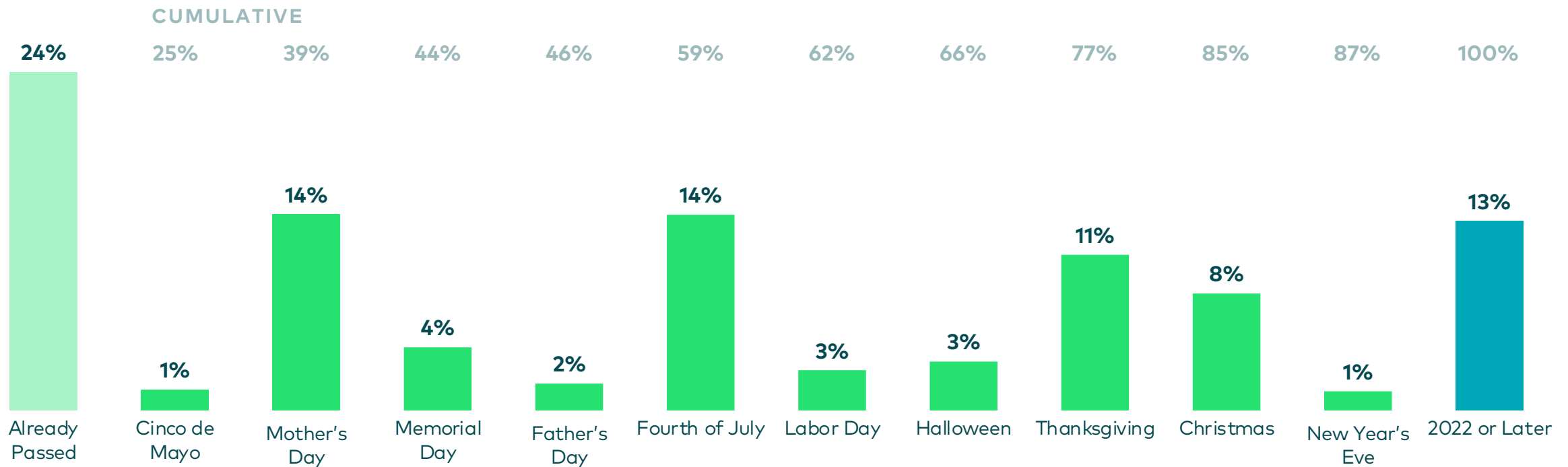
To what extent do you expect COVID-19 restrictions or limitations to impact your [HOLIDAY] celebrations this year?

Many anticipate "normal" celebrations to be allowed in the second half of the year, free of COVID restrictions...

A quarter of consumers say they've already celebrated a 2021 holiday normally, but most others are expecting a return to normal celebrations later in the year. 59% believe this will happen on or before the Fourth of July.

First "Normal" Holiday Expectation

% of consumers



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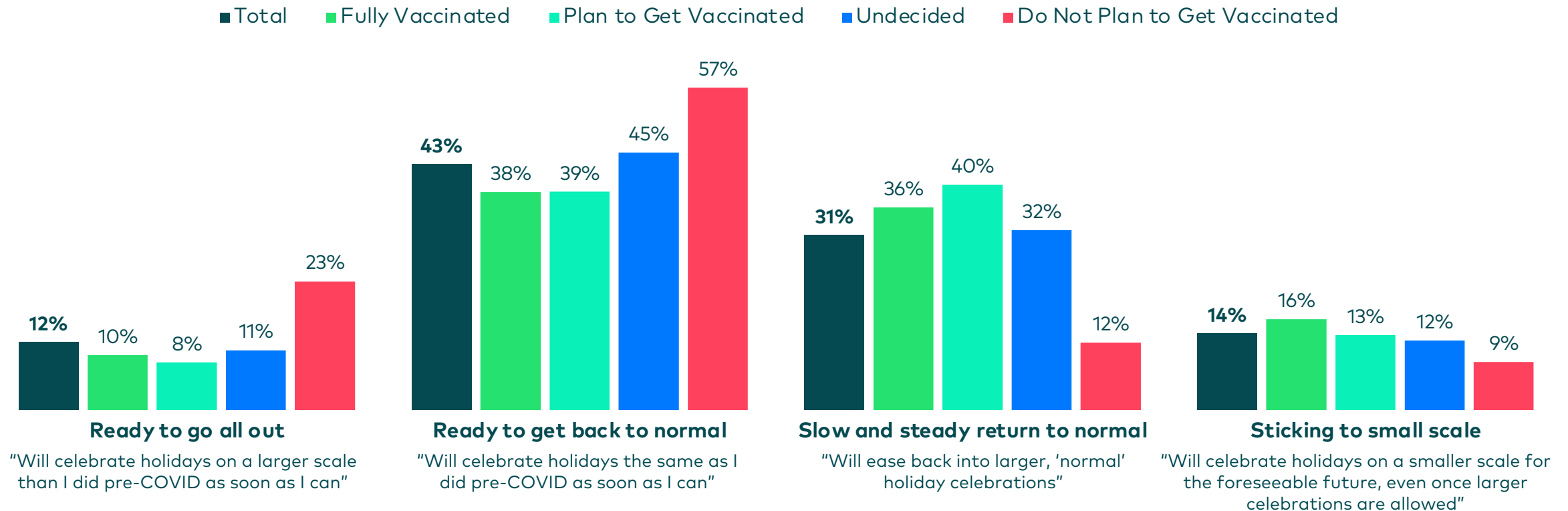
What is the first holiday you expect to be able to celebrate normally in 2021 (i.e., free of COVID-19 restrictions, able to celebrate however you'd like)?

... but not everyone will rush back to "normal" celebrations

55% of consumers say they'll begin celebrating normally or on a larger scale as soon as possible, but 45% plan to take it slow. Those who have received their vaccine already are likely to be *more* cautious than other groups.

Post-COVID Holiday Approach

% of consumers by Vaccine Status



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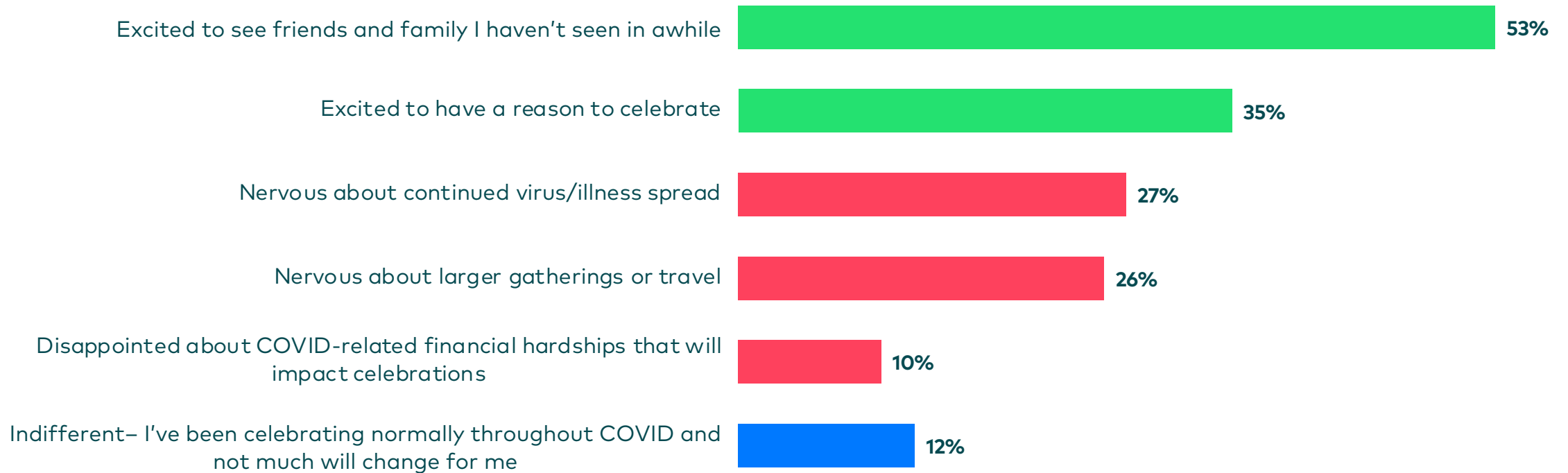
How would you describe your approach to post-COVID holiday celebrations?

Feelings toward post-COVID holidays are optimistic

Many are excited to see friends and family after a year apart and to have a reason to celebrate. However, there will be lingering fears about COVID and large gatherings, even after restrictions ease.

Feelings on "Normal" Holiday Celebrations

% of consumers



Cinco de Mayo

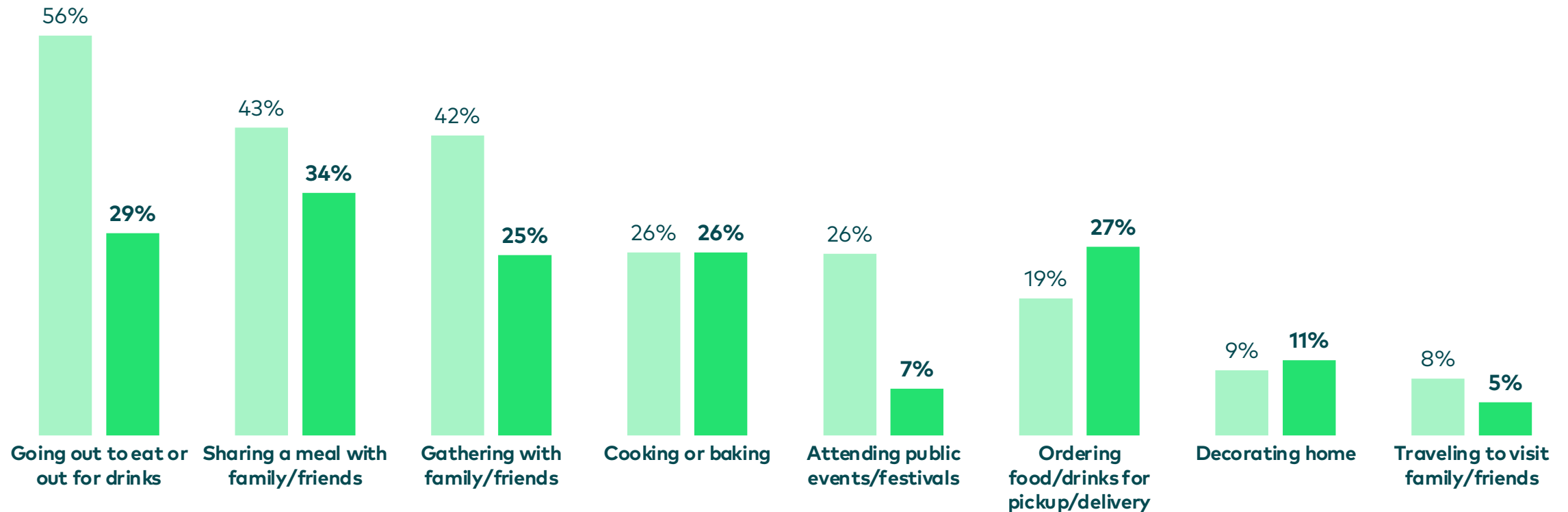
Cinco de Mayo will be celebrated on a smaller scale this year

More than half of Cinco de Mayo consumers typically go out for food or drinks to celebrate, but less than a third plan to do so this year. Ordering in will serve as a replacement, but it likely won't offset eating out declines.

Cinco de Mayo Celebration Plans

% of Cinco de Mayo Celebrators

■ Previous Years ■ This Year (2021)



Numerator 2021 Q2 Holiday Survey 04/19/2021 (n=3,964) | Cinco de Mayo Celebrators (n=989)

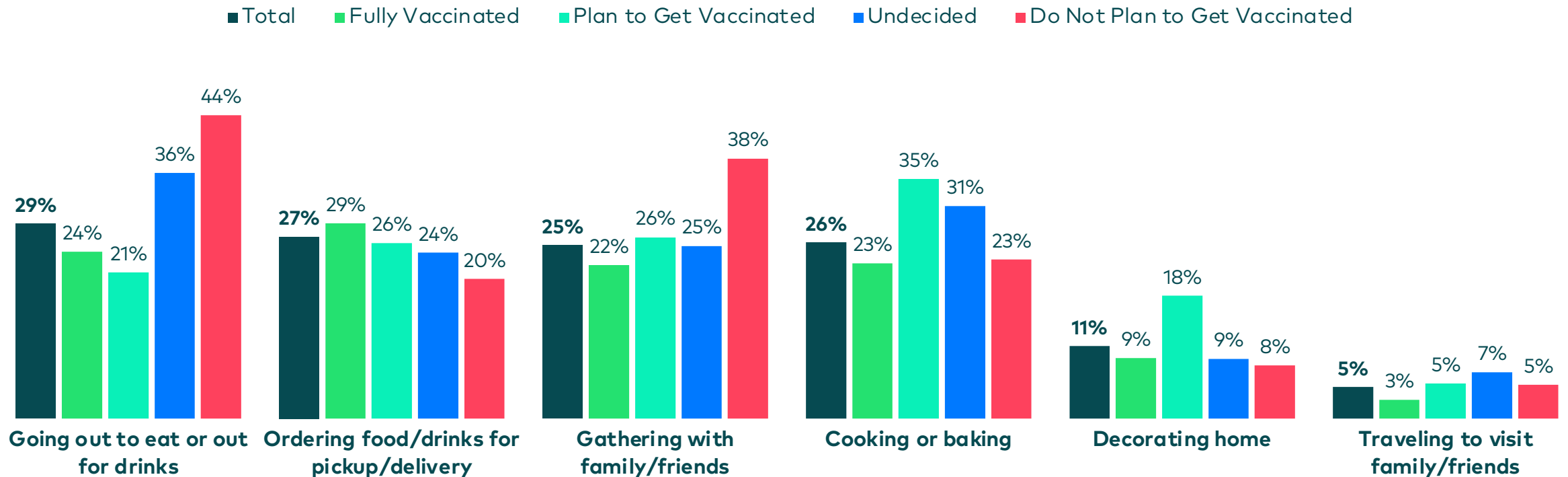
How have you typically celebrated Cinco de Mayo in the past? / How do you plan to celebrate Cinco de Mayo this year?

Vaccine's Impact: Cinco de Mayo

Those awaiting their vaccine are significantly more likely to make the holiday an at-home affair, cooking, baking & decorating, while those not planning to be vaccinated are more likely to eat out and gather with others.

Cinco de Mayo Celebration Plans

% of celebrators by Vaccine Status



Traditional retailers and takeout services will be the go-to's

Fewer consumers expect to purchase food and drinks in general this Cinco de Mayo, but potential in-store declines are small, particularly compared to restaurant declines, while takeout food is expected to be up.

Cinco de Mayo Purchases

% of Cinco de Mayo Celebrators

■ Previous Years ■ This Year (2021)



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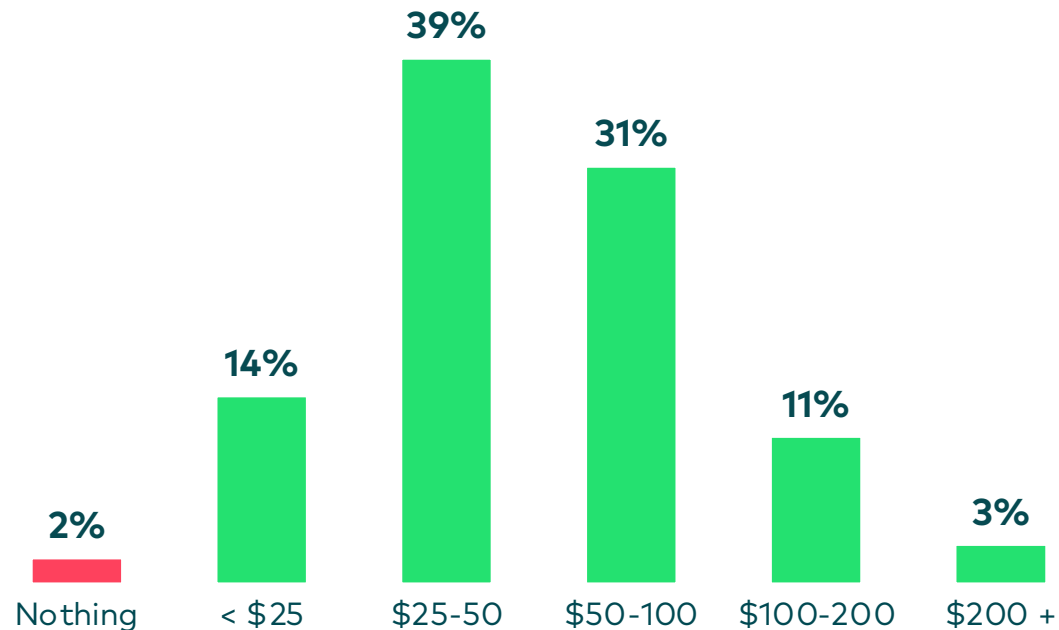
What items do you typically purchase for your Cinco de Mayo celebrations? / What do you plan to buy this year?

Cinco de Mayo spend not likely to change significantly

While they may shift the "where" and the "what," most consumers expect to spend the same on their Cinco de Mayo celebrations this year as they have in past years. The majority spend between \$25 and \$100.

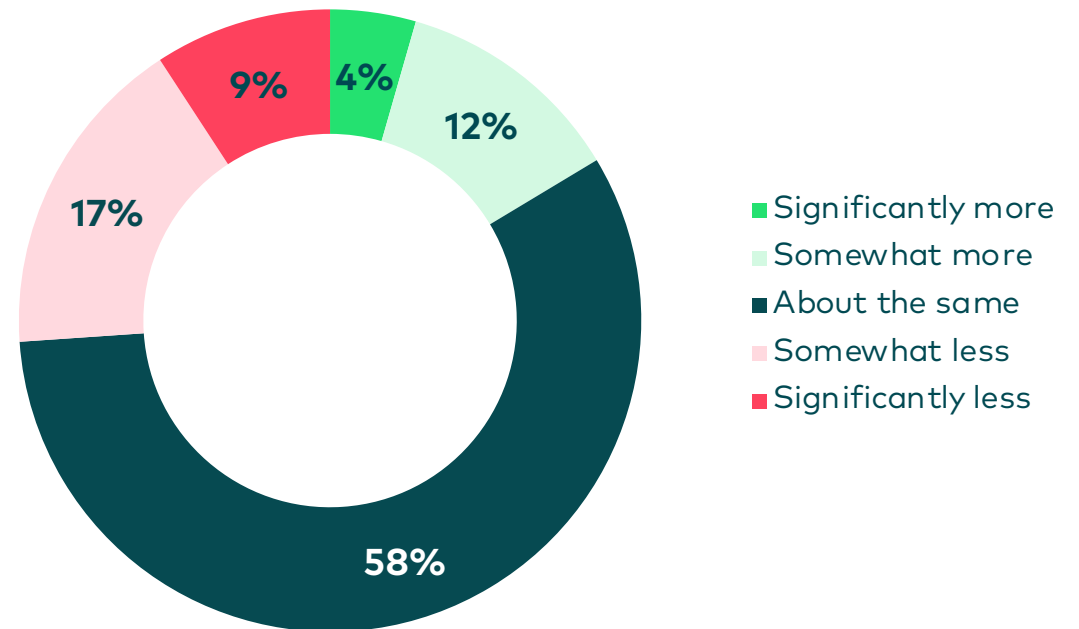
Cinco de Mayo Spending

% of Cinco de Mayo Celebrators



2021 Expected Spend vs. Previous

% of Cinco de Mayo Celebrators





Mother's Day

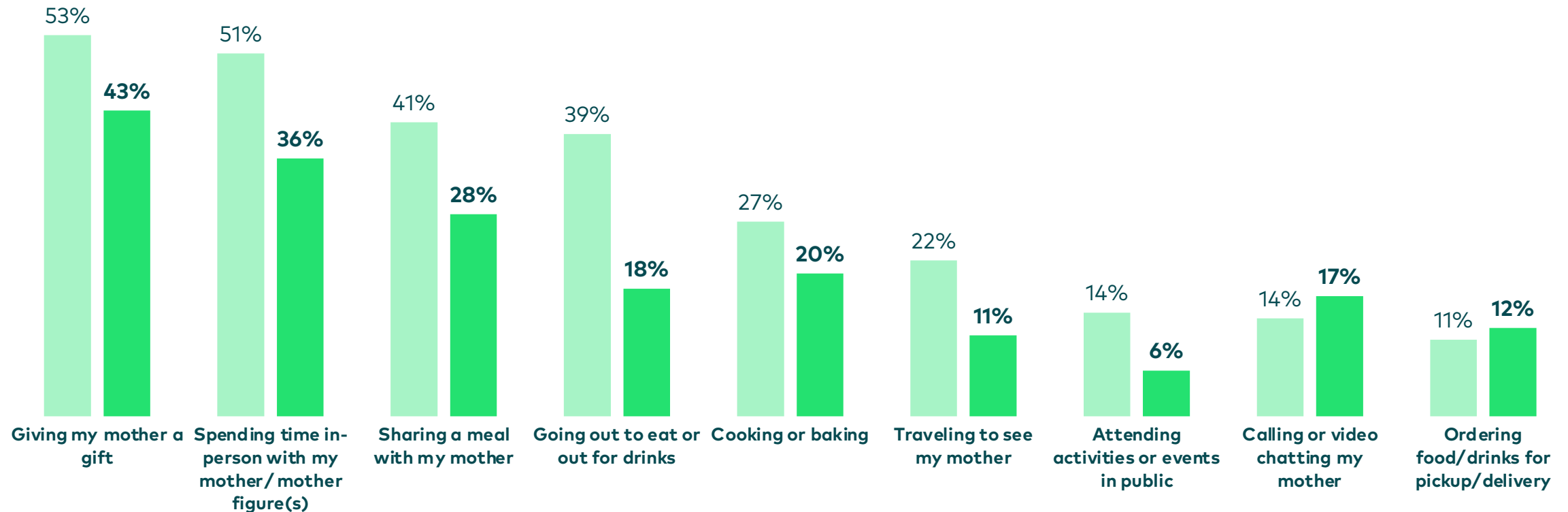
Fewer plan to gather or buy gifts this Mother's Day

Half of consumers typically give their mother a gift and spend time in-person with their mother. This year, only two fifths plan to give a gift, and about a third will spend time in-person together.

Mother's Day Celebration Plans

% of Mother's Day Celebrators

■ Previous Years ■ This Year (2021)



Numerator 2021 Q2 Holiday Survey 04/19/2021 (n=3,964) | Mother's Day Celebrators (n=991)

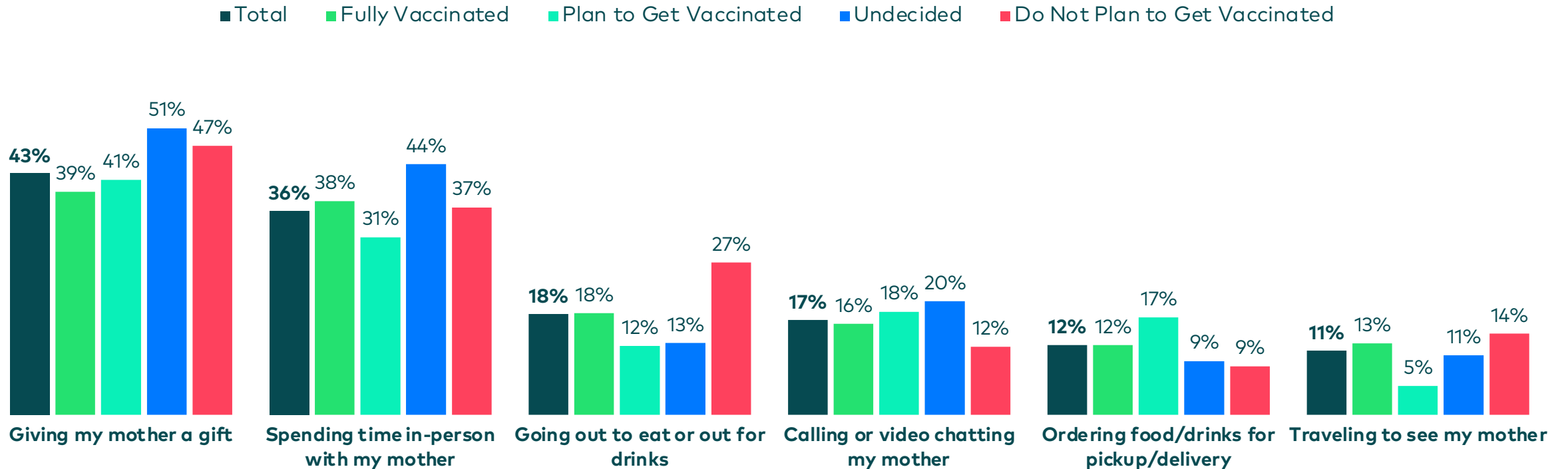
How have you typically celebrated Mother's Day in the past? / How do you plan to celebrate Mother's Day this year?

Vaccine's Impact: Mother's Day

Vaccinated shoppers are more likely to spend time in-person with their mother, to travel, and to go out to eat for Mother's Day, while those awaiting vaccination are more likely to call / video chat and order in.

Mother's Day Celebration Plans

% of celebrators by Vaccine Status

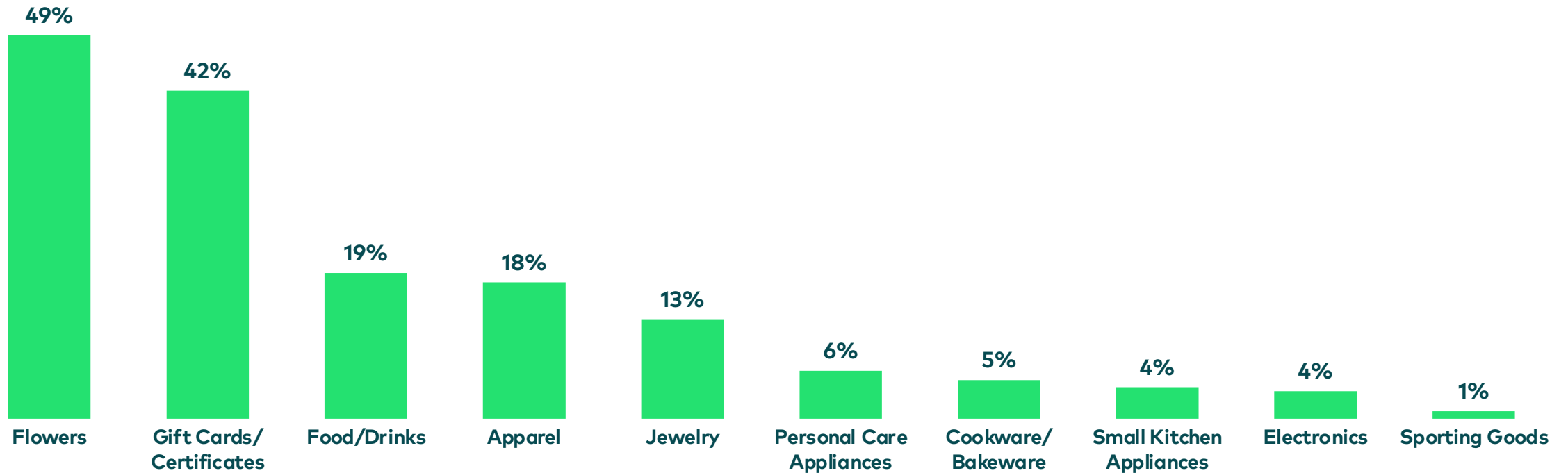


Flowers and gift cards will be top gifts for Mother's Day

Half of Mother's Day gift buyers plan to give flowers this year, and two-fifths will give gift cards or gift certificates. Other popular gifts include food & drinks, apparel, and jewelry.

Mother's Day Gift Purchases

% of Mother's Day Gift Buyers

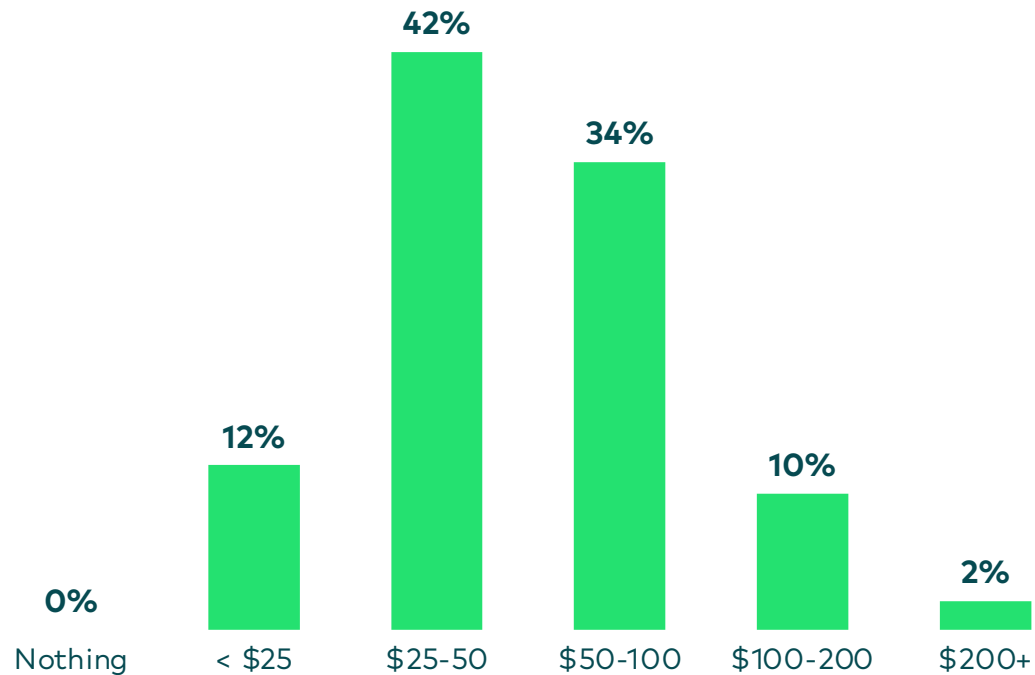


Gift spending expected to stay consistent this Mother's Day

Most consumers spend \$25 – \$100 on their Mother's Day gifts. More than two-thirds expect to spend the same amount this year, with 16% planning to spend more than previous years.

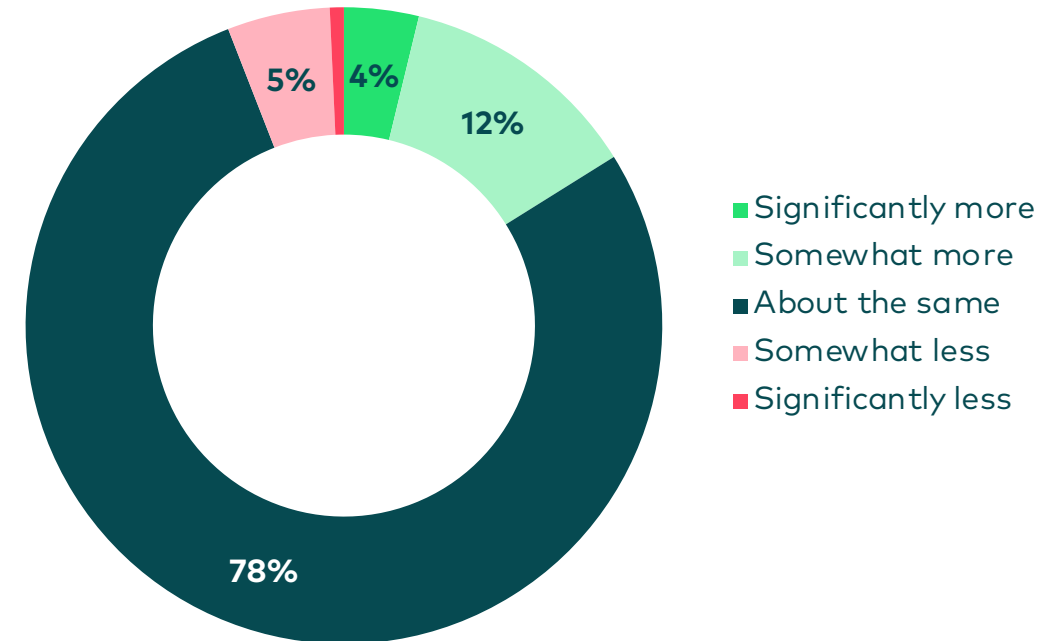
Mother's Day Gift Spending

% of Mother's Day Gift Buyers



2021 Expected Spend vs. Previous

% of Mother's Day Gift Buyers



Numerator 2021 Q2 Holiday Survey 04/19/2021 (n=3,964) | Mother's Day Celebrators (n=991)

How much do you typically spend on Mother's Day gifts? / How much do you expect to spend this year compared to a typical year?



Memorial Day

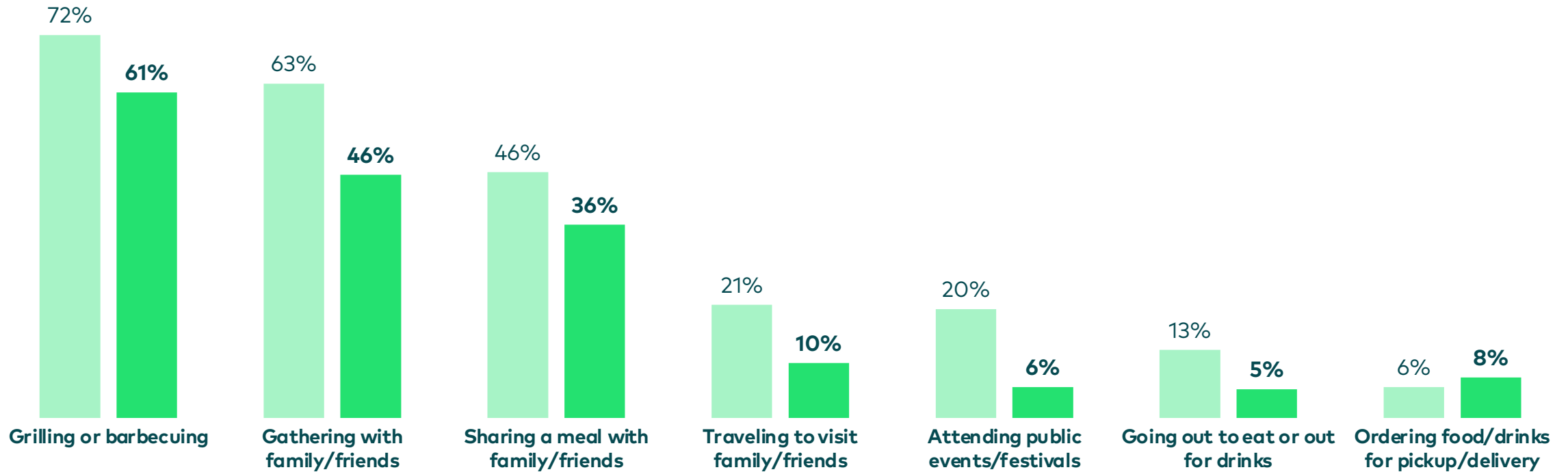
Memorial Day will see less travel & fewer gatherings this year

Grilling and barbecuing expected to remain the top way to celebrate Memorial Day this year, though gatherings are likely to be fewer and smaller, is is travel and public events.

Memorial Day Celebration Plans

% of Memorial Day Celebrators

■ Previous Years ■ This Year (2021)



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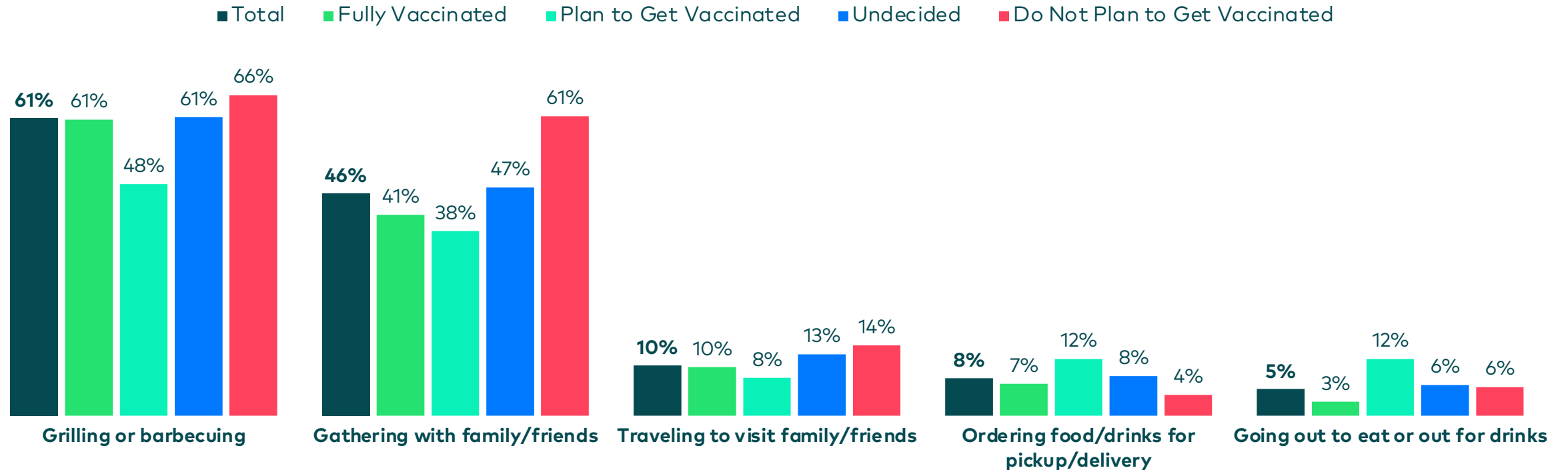
How have you typically celebrated Memorial Day in the past? / How do you plan to celebrate Memorial Day this year?

Vaccine's Impact: Memorial Day

Those awaiting vaccines are less likely to BBQ, gather with family & friends, or to travel, but are more likely than other groups to go out to eat or to order in for their holiday celebrations.

Mother's Day Celebration Plans

% of celebrators by Vaccine Status



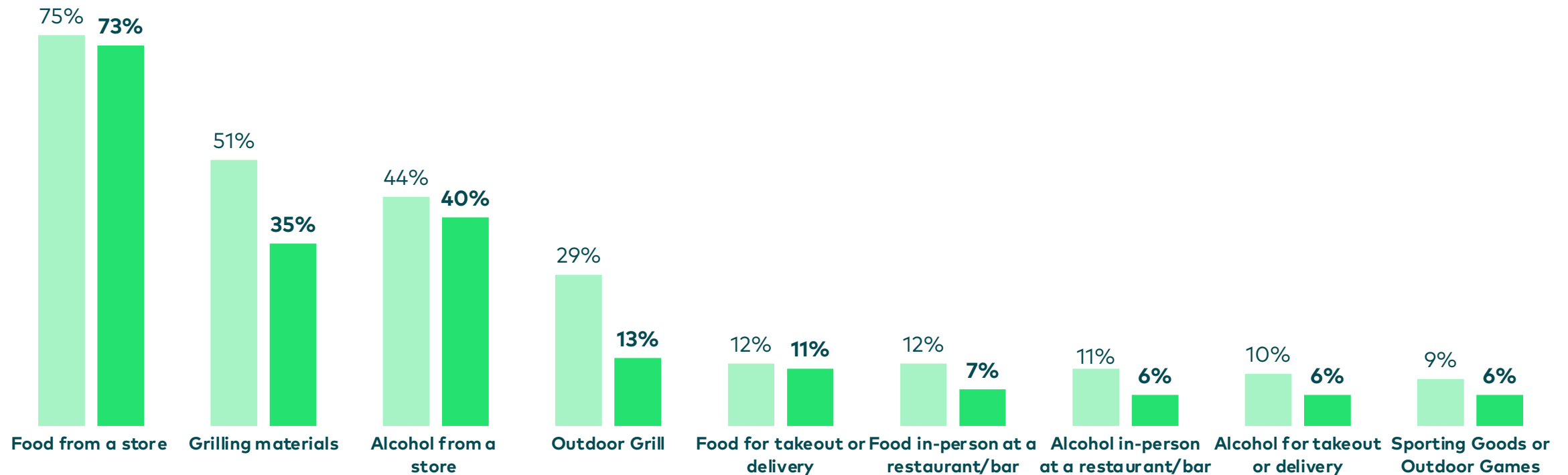
Food and drink purchases at traditional stores likely to hold steady this Memorial Day

Three-fourths of consumers plan to purchase food and beverages from traditional retailers this year.

Memorial Day Purchases

% of Memorial Day Celebrators

■ Previous Years ■ This Year (2021)



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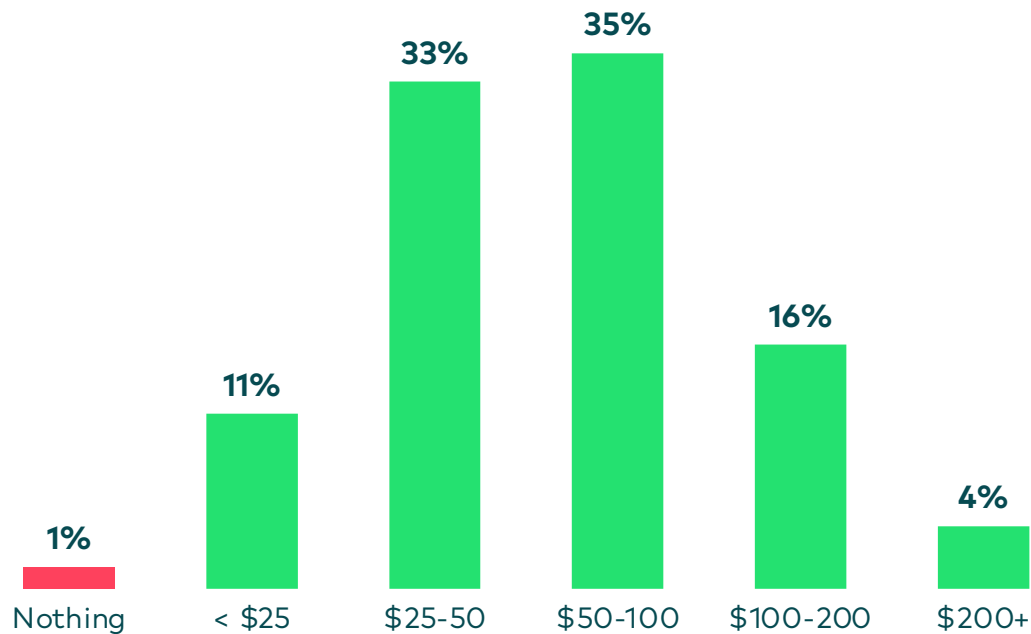
What items do you typically purchase for your Memorial Day celebrations? / What do you plan to buy this year?

Most consumers expect consistent spending this Memorial Day

Compared to typical years, 60% of consumers plan to spend the same on their Memorial Day celebrations this year, though 1 in 4 think they will spend less than they typically do.

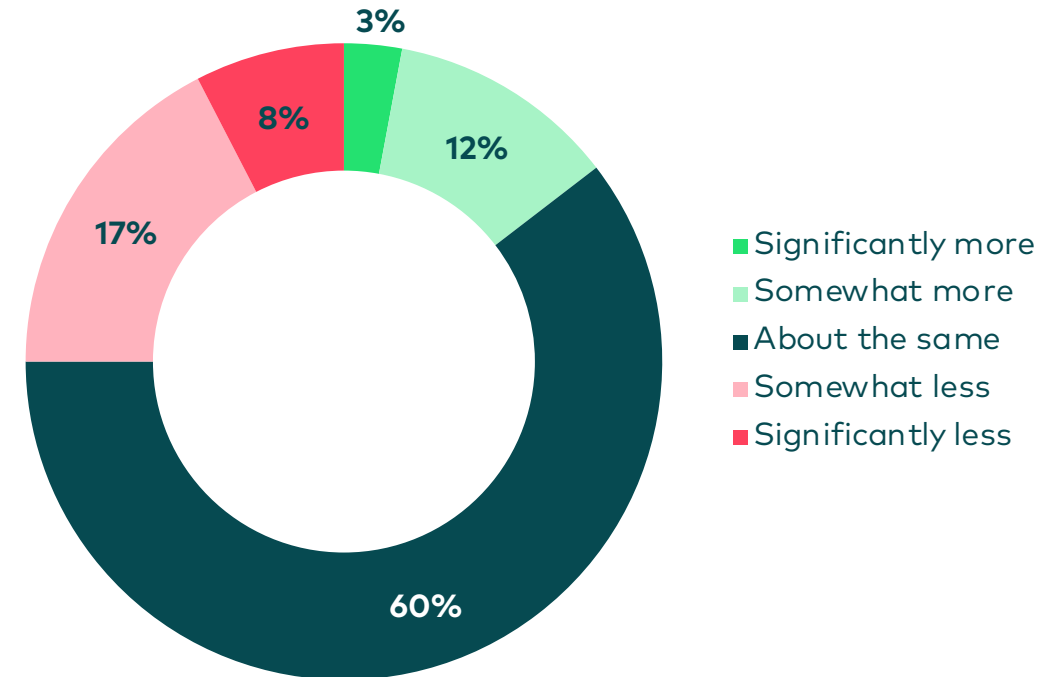
Memorial Day Spending

% of Memorial Day Celebrators



2021 Expected Spend vs. Previous

% of Memorial Day Celebrators



Numerator 2021 Q2 Holiday Survey 04/19/2021 (n=3,964) | Memorial Day Celebrators (n=988)

How much do you typically spend on Memorial Day items in total? / How much do you expect to spend this year compared to a typical year?



Father's Day

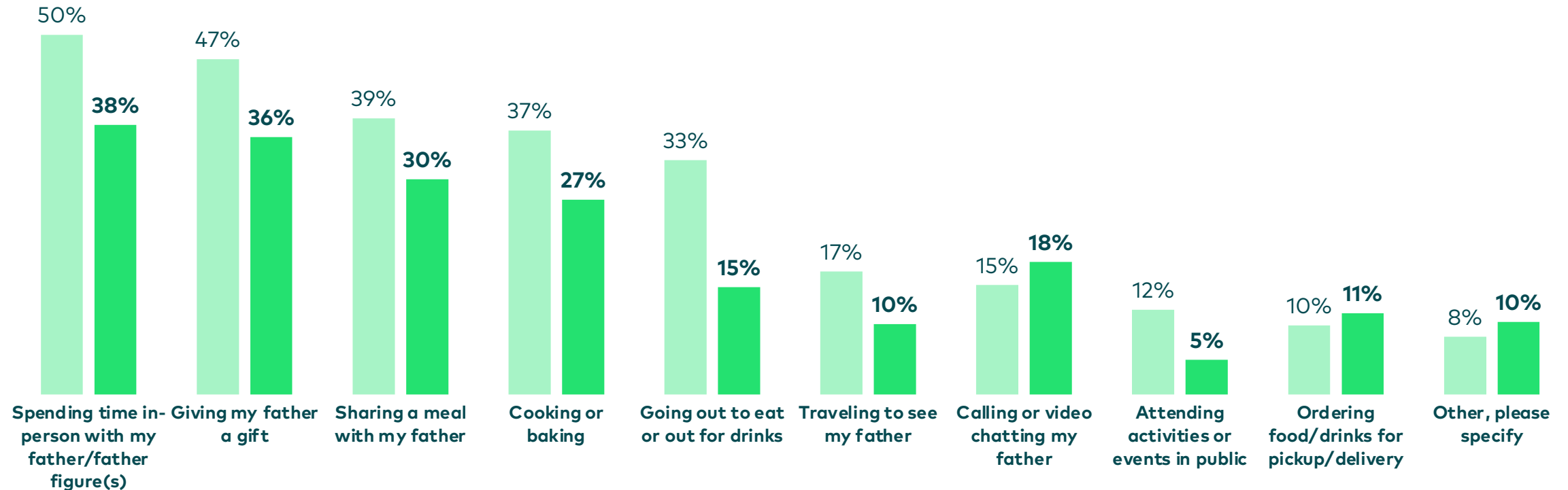
Fewer plan to gather or buy gifts this Father's Day

Half of consumers typically give their father a gift and spend time in-person with their father. This year, just over a third plan to give a gift or spend time in-person together.

Father's Day Celebration Plans

% of Father's Day Celebrators

■ Previous Years ■ This Year (2021)



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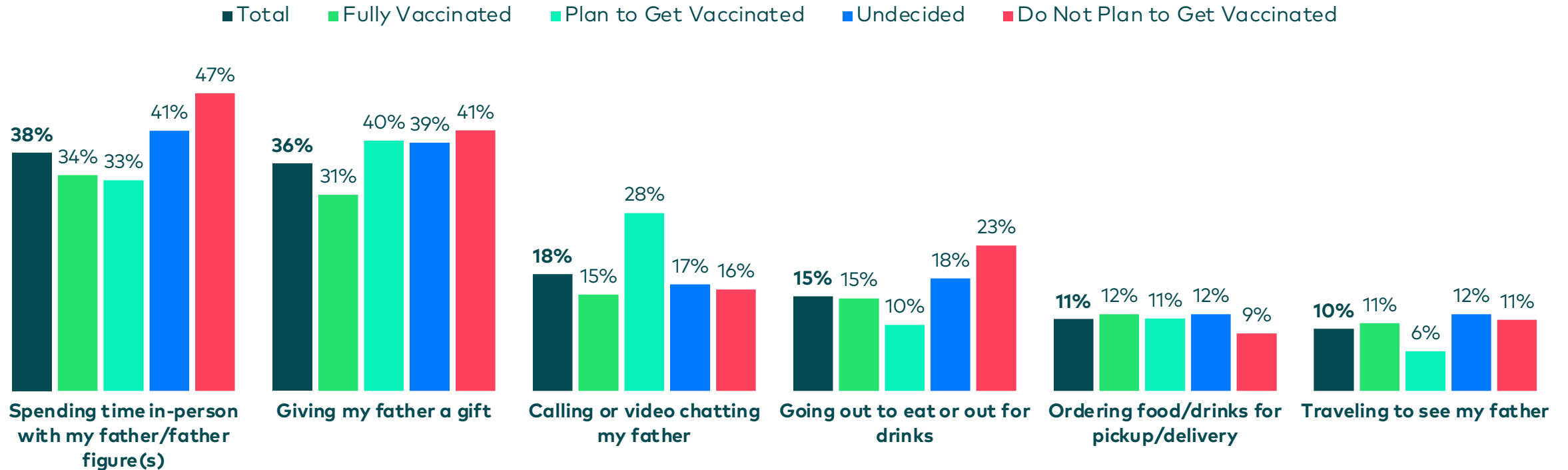
How have you typically celebrated Father's Day in the past? / How do you plan to celebrate Father's Day this year?

Vaccine's Impact: Father's Day

Those awaiting vaccines are significantly more likely to call or video chat their father rather than spending time together in-person. They are also less likely to go out to eat, though most groups have equal plans to order in.

Mother's Day Celebration Plans

% of celebrators by Vaccine Status

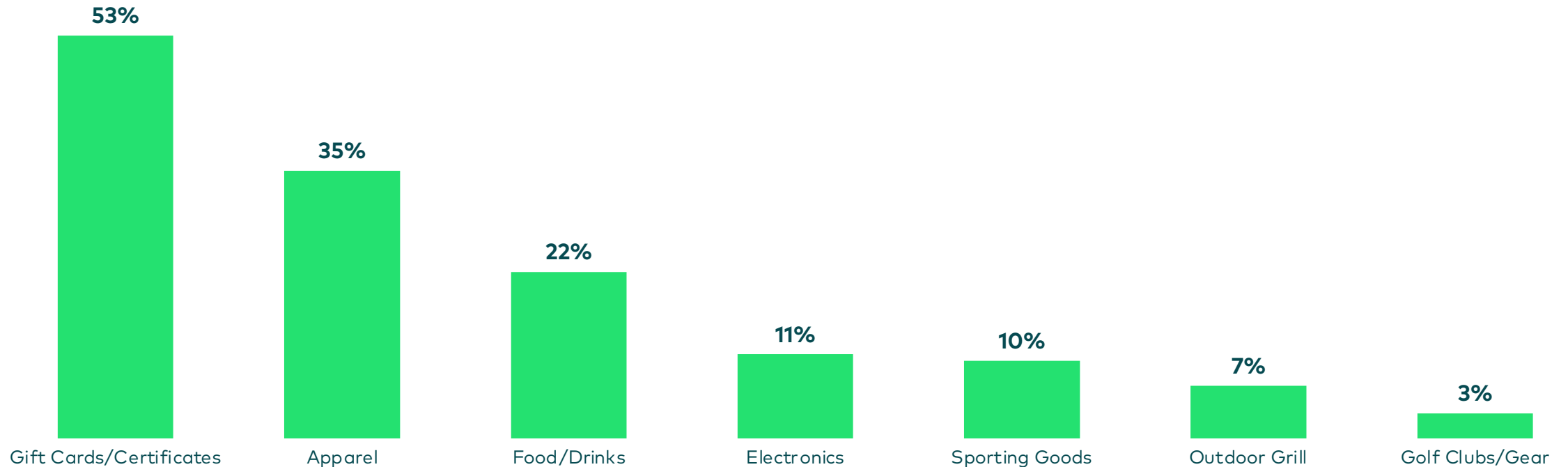


Gift cards are the #1 gift for Father's Day

Half of Father's Day gift buyers say they'll give a gift card this Father's Day, with apparel and food & drinks the next top gifts. One in ten expect to buy electronics or sporting goods for their fathers.

Father's Day Gift Purchases

% of Father's Day Gift Buyers

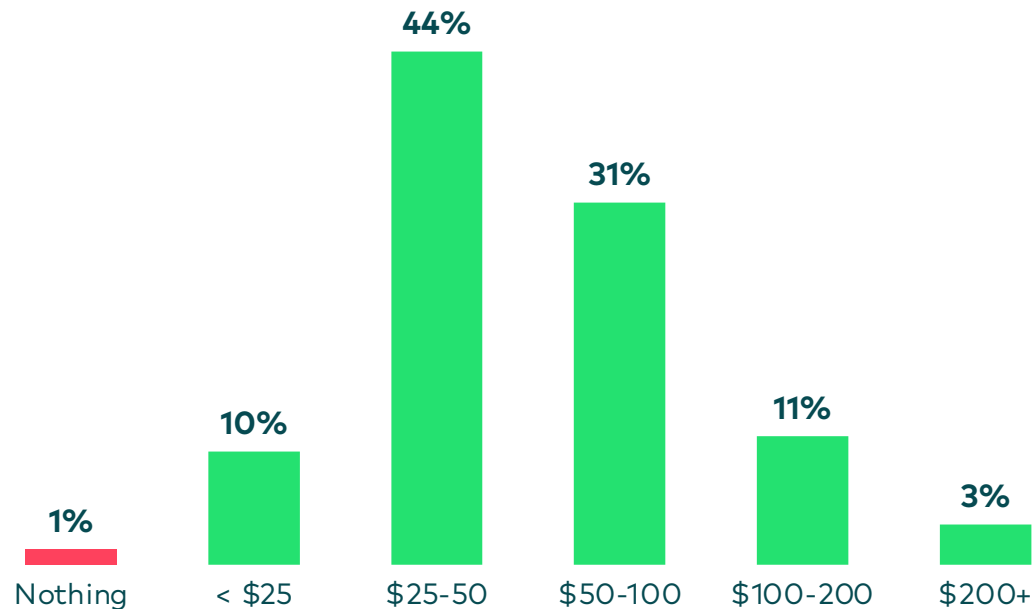


Majority of Father's Day gift buyers won't change spending

Nearly half spend between \$25 to \$50 on their Father's Day gifts, and 81% expect this to remain the same this year, while about 14% plan to spend more on their Father's Day gifts.

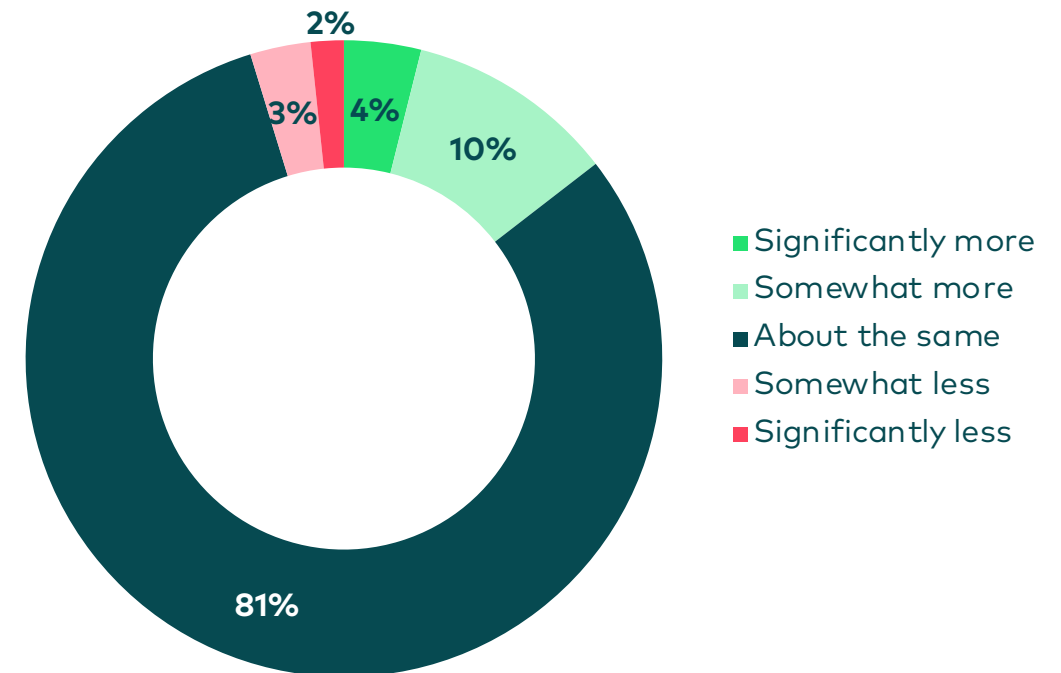
Father's Day Spending

% of Father's Day Celebrators



2021 Expected Spend vs. Previous

% of Father's Day Celebrators



Numerator 2021 Q2 Holiday Survey 04/19/2021 (n=3,964) | Father's Day Celebrators (n=996)

How much do you typically spend on Father's Day gifts? / How much do you expect to spend this year compared to a typical year?



Want to know more?

hello@numerator.com

