



2021 Holiday Consumer Intentions

Summer Holidays

Fourth of July • Labor Day

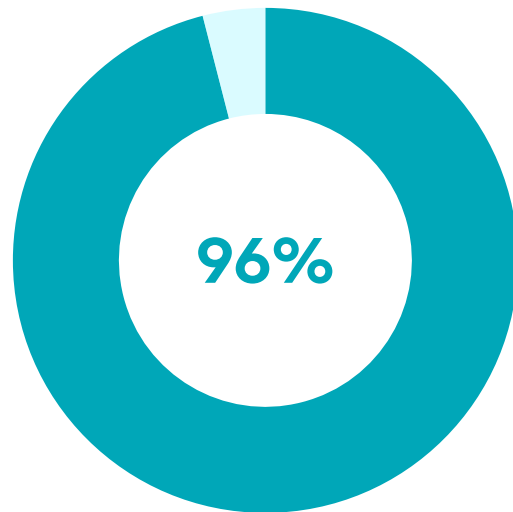


Numerator Holiday Intentions Study

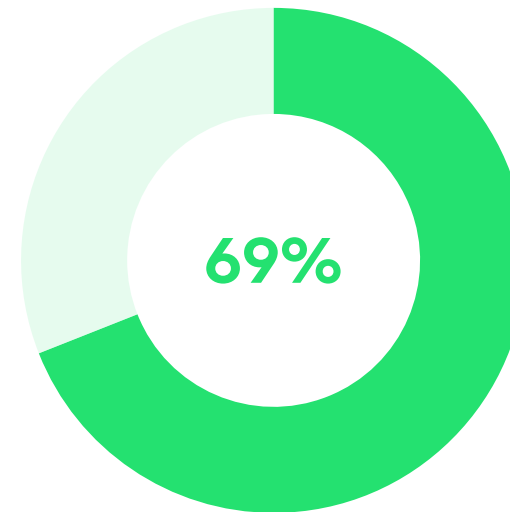
The Q3 Holiday Intentions survey was fielded to 2,016 Numerator OmniPanelists from 6/3/21 to 6/4/21 and covered Fourth of July and Labor Day. All were asked which of the of these holidays they typically celebrated & were then asked more in-depth about 2021 celebration plans for one of their selected holidays.

% OF CONSUMERS WHO TYPICALLY CELEBRATE...

Fourth of July



Labor Day

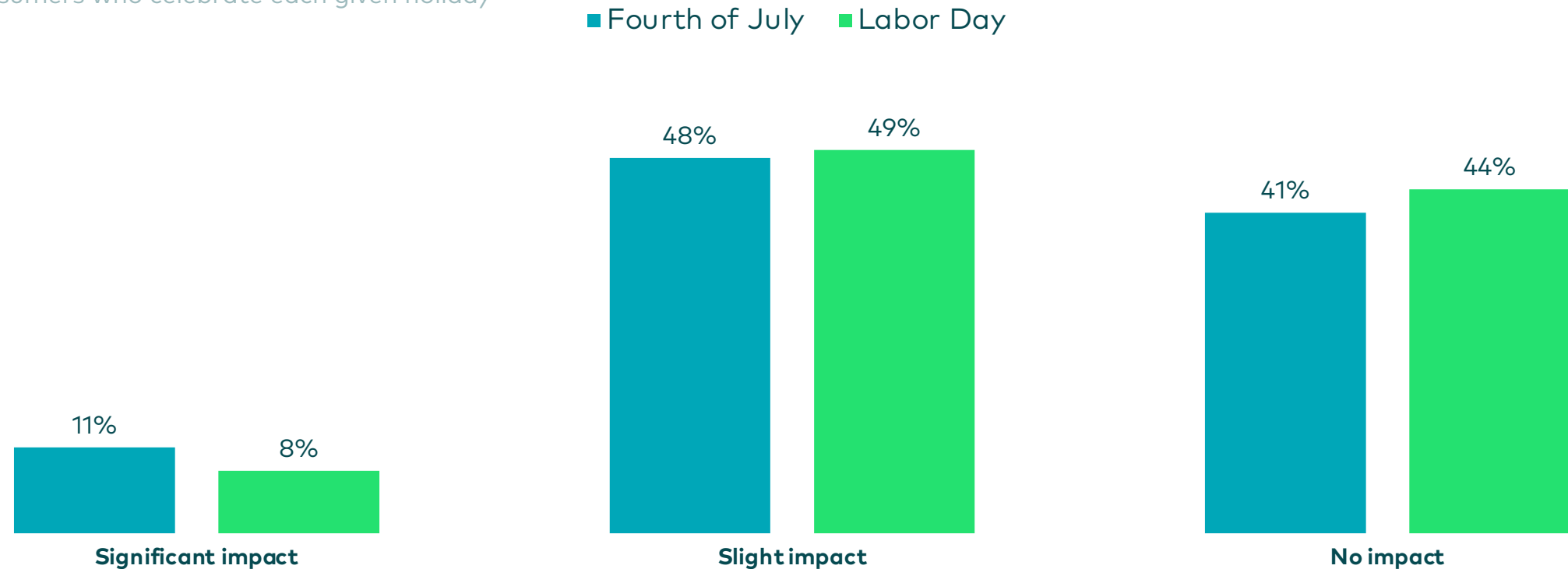


Most consumers expect little-to-no COVID impacts on their summer holiday celebrations

About half of consumers expect only a slight impact to the two upcoming summer holidays, with 2 in 5 expecting no impact. Consumers expect Labor Day to be even less impacted by COVID than Fourth of July.

Expected COVID Impact

% of consumers who celebrate each given holiday

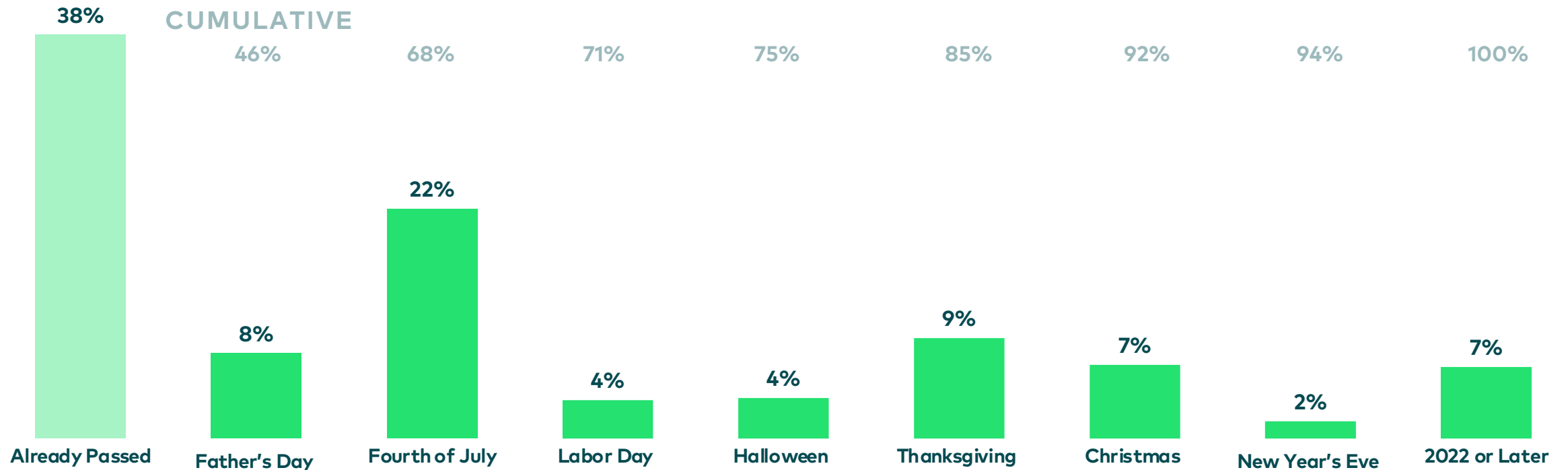


1 in 5 consumers expect their first "normal" celebration of 2021 to be the Fourth of July...

Over a third of consumers say they've already celebrated a 2021 holiday normally, and almost all expect to partake in a celebration free from pandemic restrictions by the end of 2021.

First "Normal" Holiday Expectation

% of consumers



Numerator 2021 Q3 Holiday Survey 06/04/2021 (n=2,016)

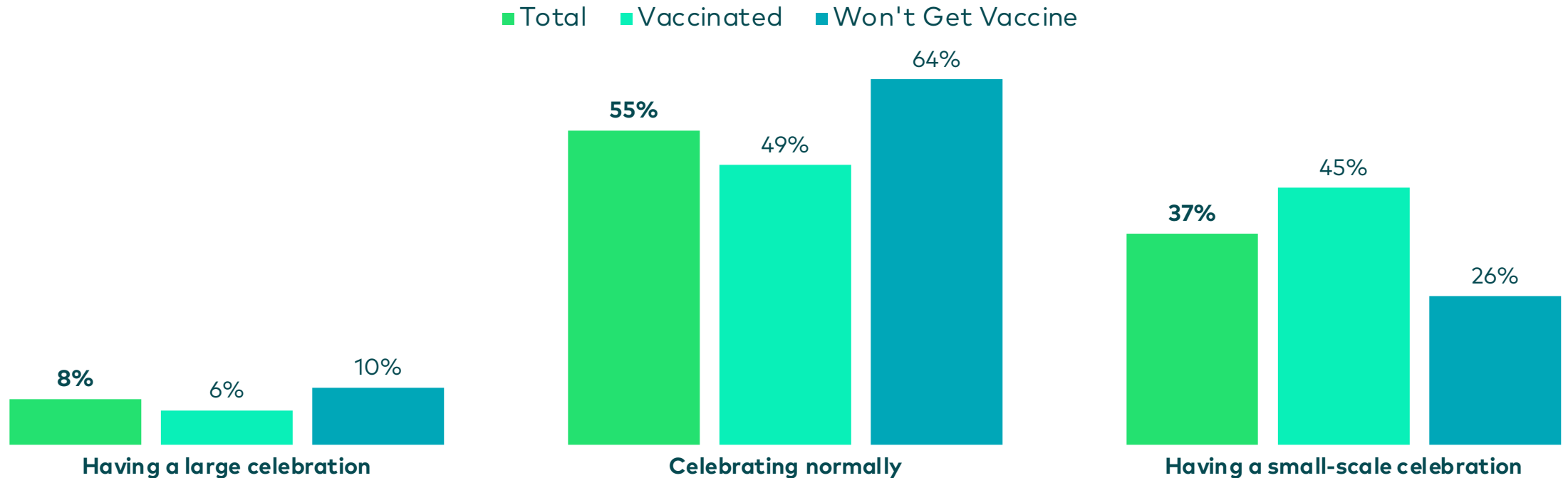
What is the first holiday you expect to be able to celebrate normally in 2021 (i.e., free of COVID-19 restrictions, able to celebrate however you'd like)?

...but "normal" celebrations might still look a bit different

6 in 10 consumers say they'll be celebrating normally or on a larger scale this summer, but 4 in 10 plan to keep their celebrations small. Vaccinated individuals are likely to remain more cautious than other groups.

Post-COVID Holiday Approach

% of consumers by Vaccine Status



Numerator 2021 Q3 Holiday Survey 06/04/2021 (n=2,016)

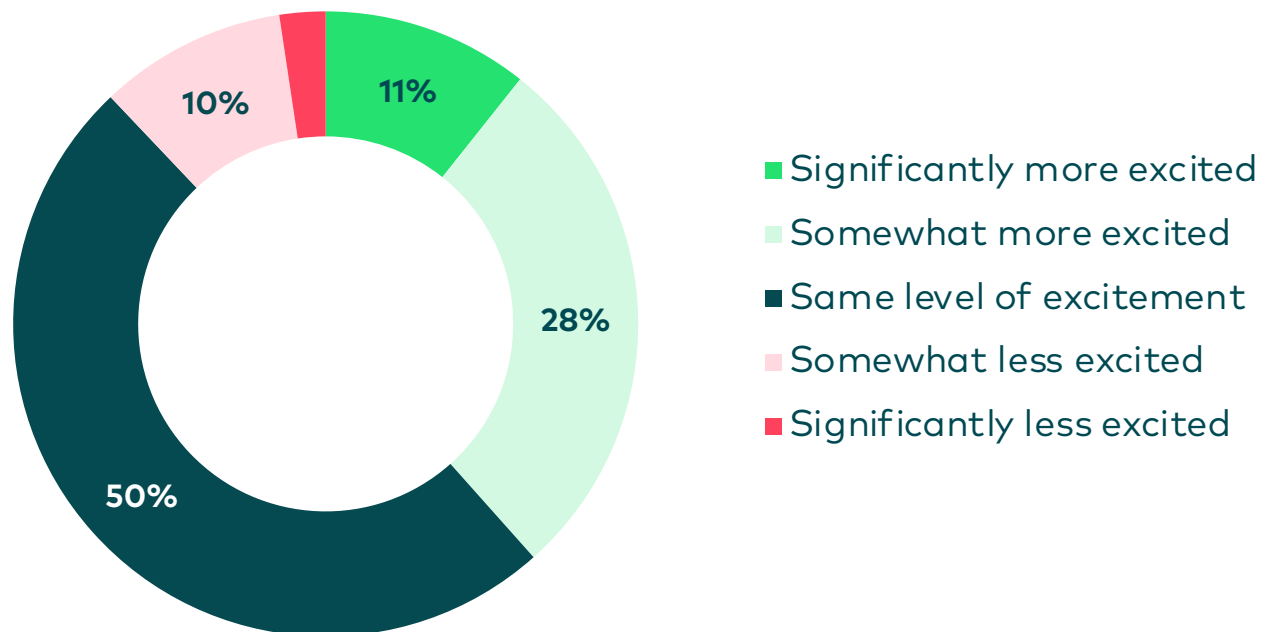
Which of the following best describes your approach to upcoming summer holiday celebrations?

2 in 5 consumers have elevated levels of excitement for the upcoming summer holidays

As pandemic restrictions loosen their grip, consumers are buzzing with anticipation for a return to more normal behaviors, inclusive of gatherings and social events.

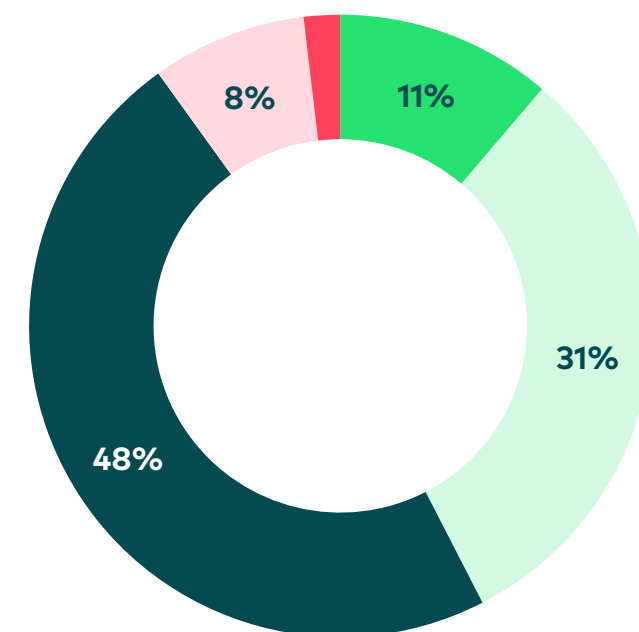
2021 Fourth of July Excitement vs. Previous

% of Fourth of July Day Celebrators



2021 Labor Day Excitement vs. Previous

% of Labor Day Celebrators

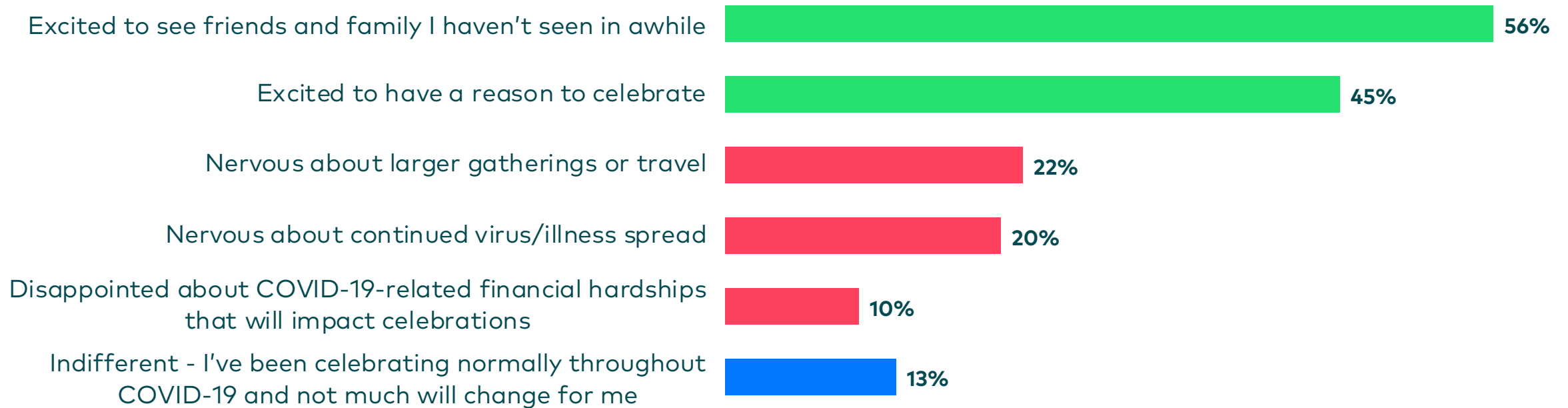


Sentiments toward post-COVID holiday celebrations are positive and people-focused

Many are excited to see friends and family after a year apart and to have a reason to celebrate. Despite this, there will still be some negative feelings towards gatherings and hardships, even after restrictions are lifted.

Feelings on "Normal" Holiday Celebrations

% of consumers





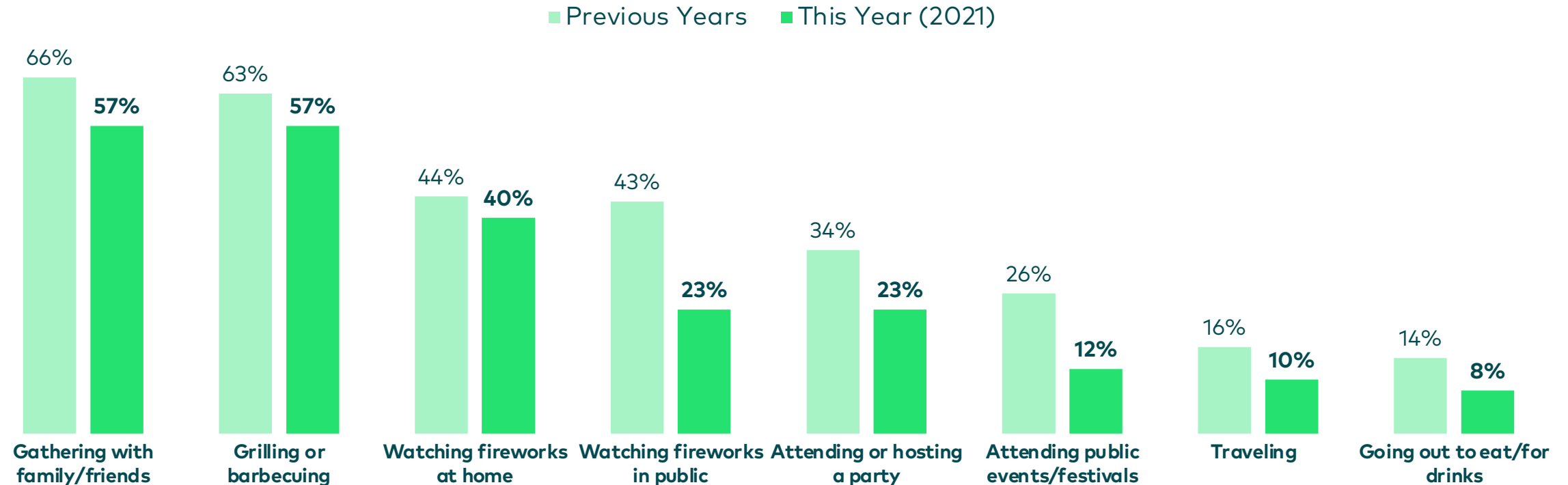
Fourth of July

Fourth of July celebration plans reminiscent of normal times

While most celebratory activities – especially those focused on public events – will still be slightly less prevalent this year, gathering with others, grilling, and at-home firework watches are expected to approach typical levels.

Fourth of July Celebration Plans

% of Fourth of July Celebrators

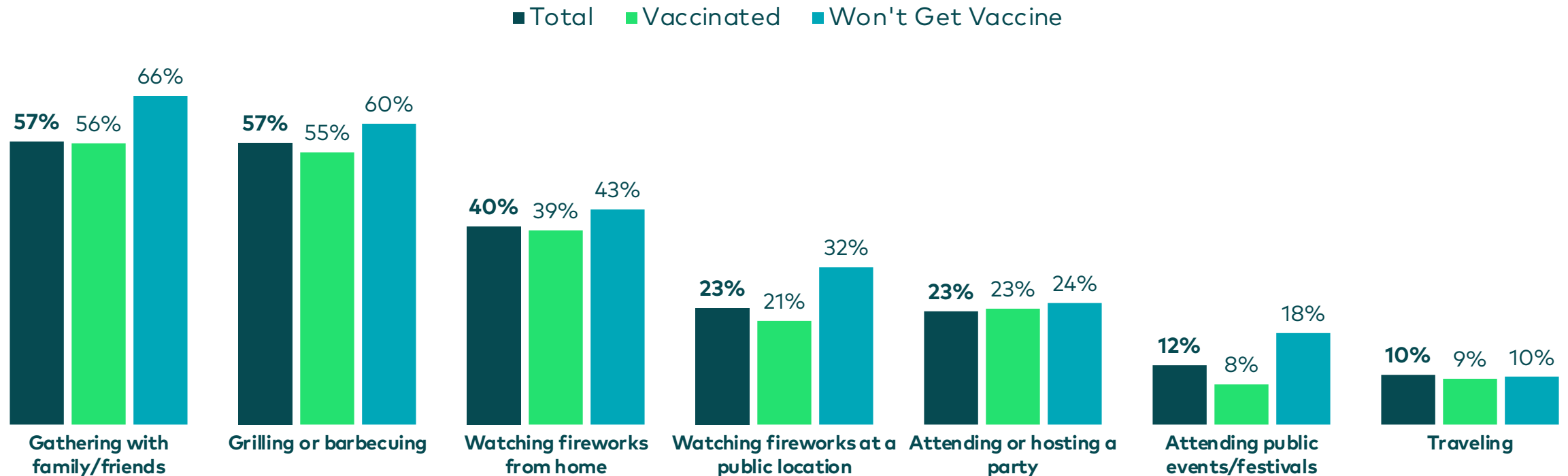


Vaccine's Impact: Fourth of July

Vaccinated consumers display more caution in their Fourth of July plans, while consumers who won't get the vaccine are more likely to attend public events such as fireworks and festivals.

Fourth of July Celebration Plans

% of celebrators by Vaccine Status

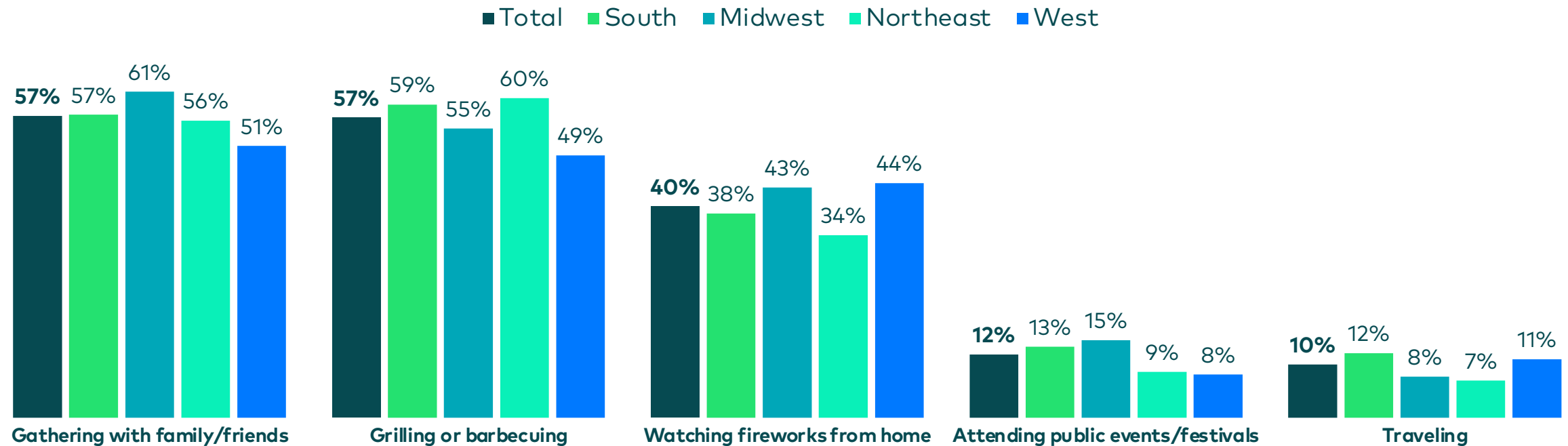


Regional Impact: Fourth of July

Celebration plans also differ based on regionality. Midwest consumers are the most likely to gather with friends & family and to attend public events. Consumers from the South and West are more likely to travel for the holiday.

Fourth of July Celebration Plans

% of celebrators by Region

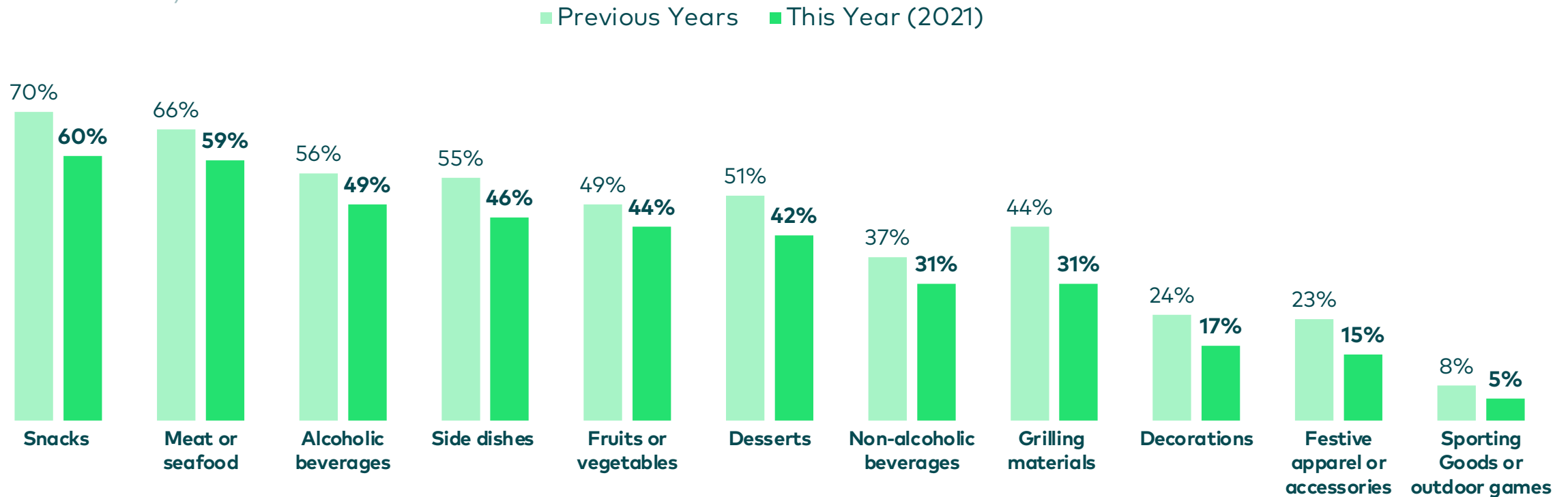


Consumers expect to purchase similar items this year for their Fourth of July celebrations

While overall planned purchases declined slightly across the board, top items for Fourth of July celebrations are expected to be in-line with previous years: snacks, meat & seafood, and alcoholic beverages.

Fourth of July Purchases

% of Fourth of July Celebrators



Numerator 2021 Q3 Holiday Survey 06/04/2021 (n=2,016) | Fourth of July Celebrators (n=1,010)

What items do you typically purchase for your Fourth of July celebrations? / What do you plan to buy this year?

Consumers plan to get their Fourth of July supplies at the same stores they historically have

The grocery channel will be the top destination for Fourth of July goods, followed by mass and club retailers.

Fourth of July Purchase Location

% of Fourth of July Celebrators

■ Previous Years ■ This Year (2021)



Fourth of July spend not likely to change significantly

While method of purchase and items may change slightly, the majority of consumers (2 in 3) expect to spend the same on their Fourth of July celebrations this year as they have in past years.

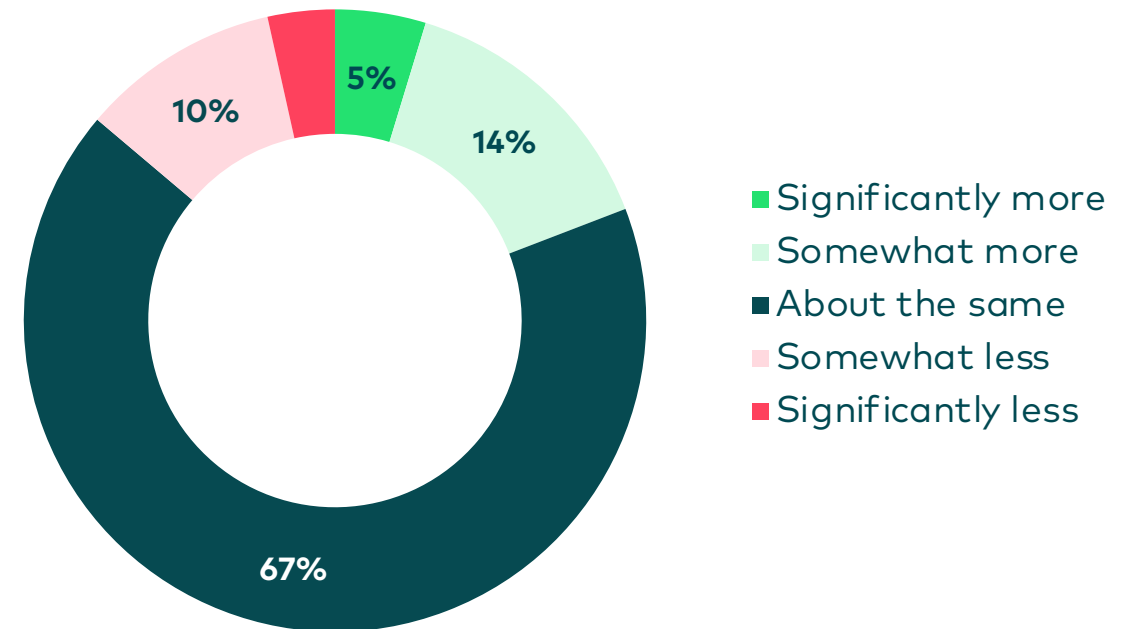
Fourth of July Spending

% of Fourth of July Celebrators



2021 Expected Spend vs. Previous

% of Fourth of July Celebrators



Labor Day

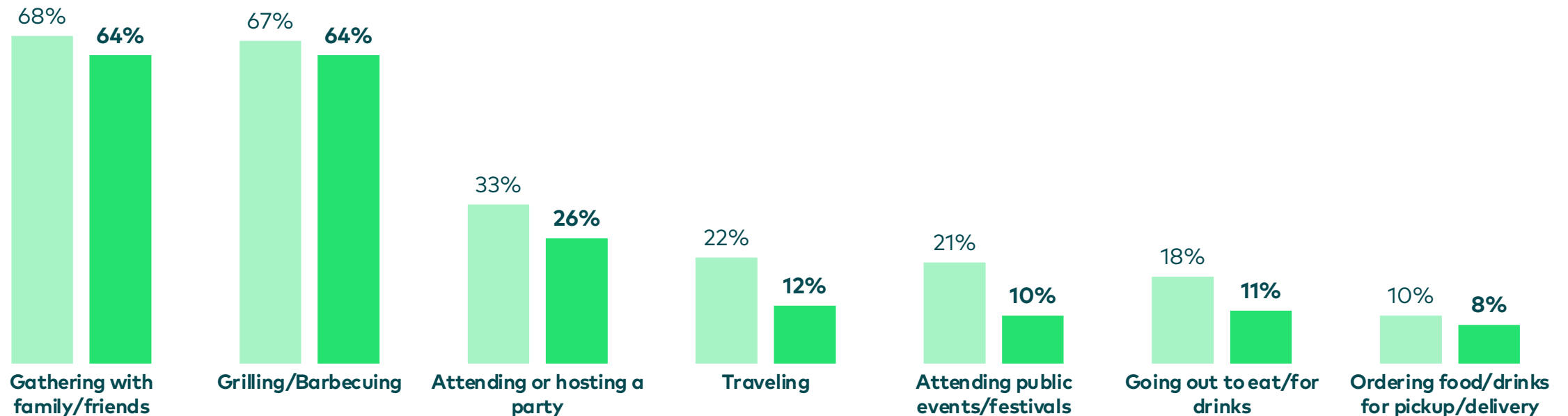
Labor Day celebration plans reminiscent of normal times

2 in 3 consumers plan to gather with family & friends or to grill this Labor Day, on-par with a typical year. Traveling, attending public events, and going out to eat are all still expected to remain below normal levels.

Labor Day Celebration Plans

% of Labor Day Celebrators

■ Previous Years ■ This Year (2021)



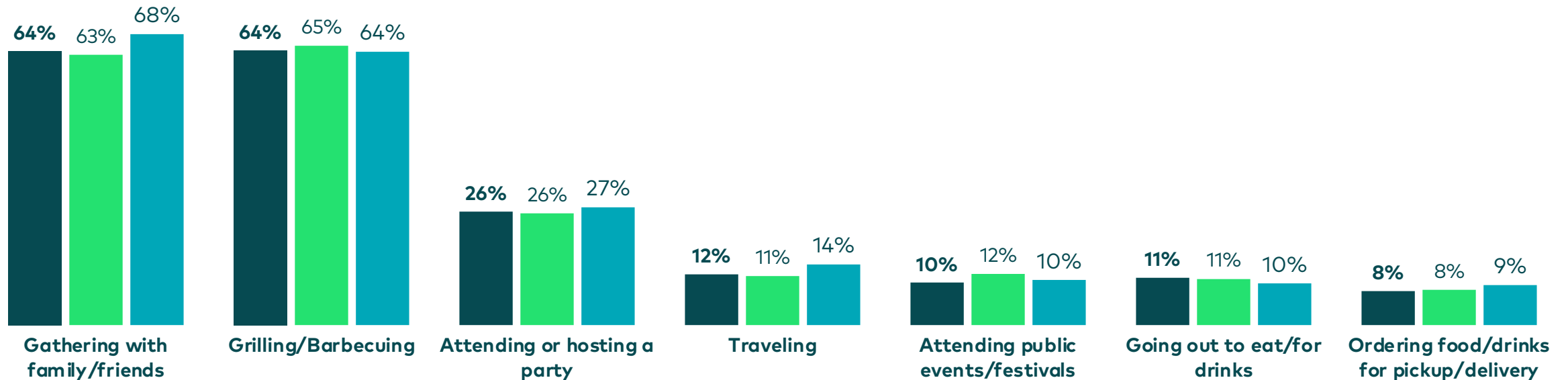
Vaccine's Impact: Labor Day

Labor Day celebration plans are consistent across vaccine groups, with vaccinated individuals only slightly less likely to gather or travel than those who don't plan to get the vaccine.

Labor Day Celebration Plans

% of celebrators by Vaccine Status

■ Total ■ Vaccinated ■ Won't Get Vaccine



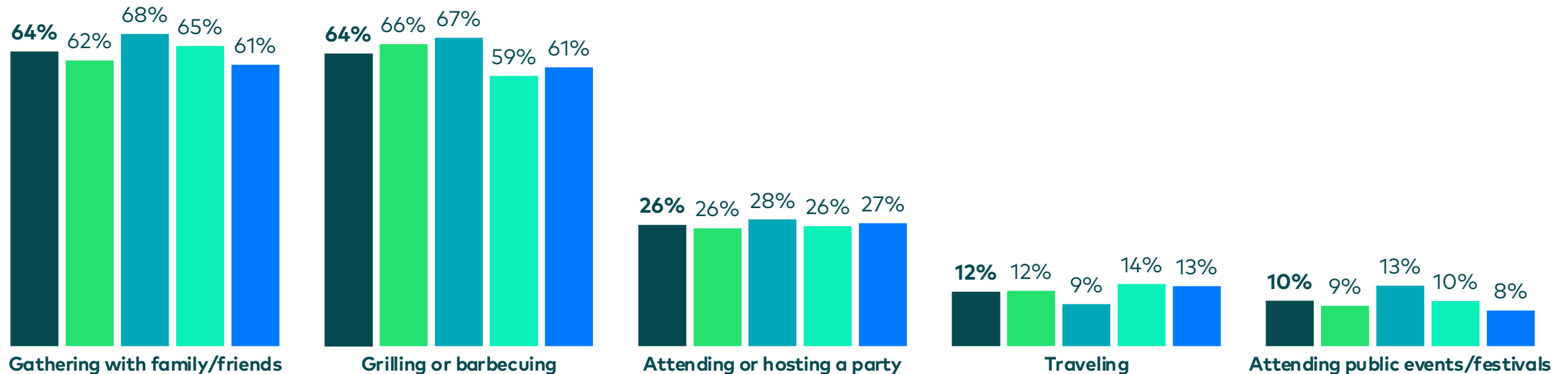
Regional Impact: Labor Day

Celebration plans are fairly consistent across US regions, aside from the Midwest, where consumers are slightly more likely to gather, grill, and attend parties or festivals, and slightly less likely to travel.

Labor Day Celebration Plans

% of celebrators by Region

■ Total ■ South ■ Midwest ■ Northeast ■ West

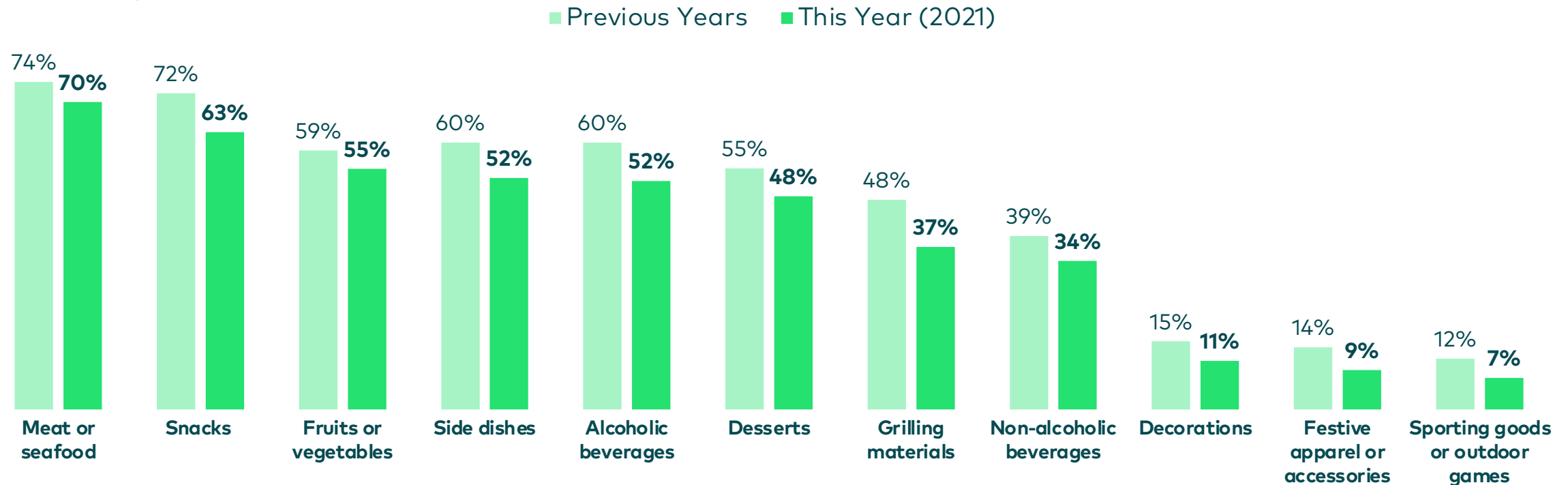


Consumers plan on stocking up for grilling out this Labor Day

Expected Labor Day purchases are in line with previous years. Meat & seafood, snacks, and fruits & vegetables are all expected to be top items purchased this year.

Labor Day Purchases

% of Labor Day Celebrators

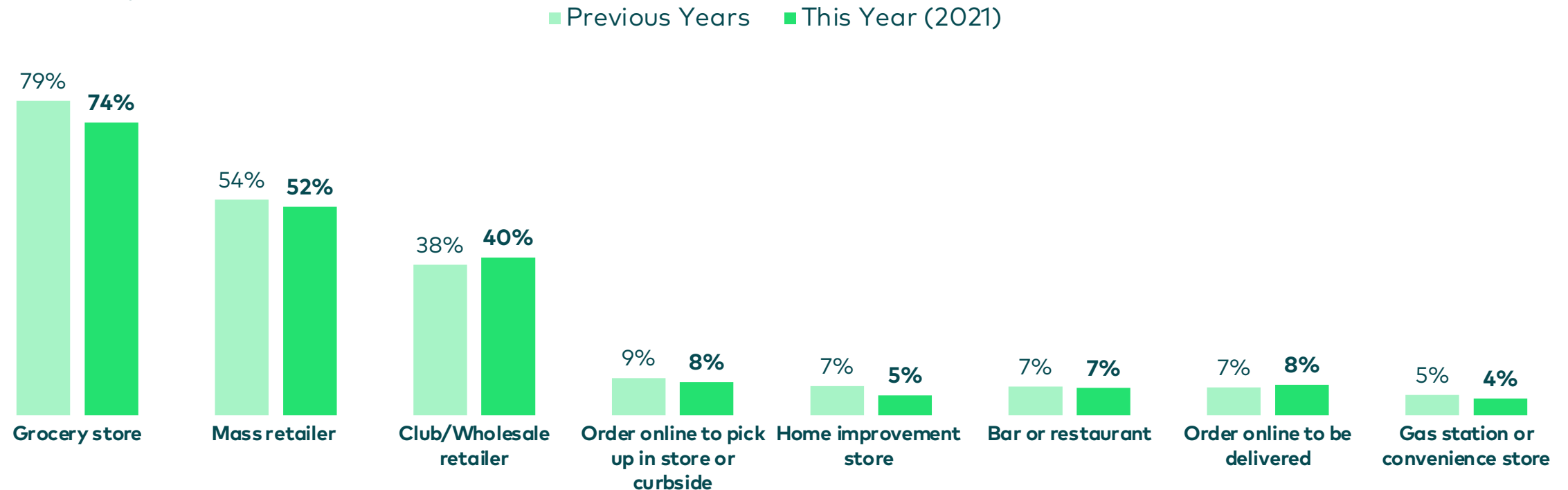


Most Labor Day shopping expected to occur at grocery stores

Labor Day shopping locations are expected to mirror past years. 3 in 4 consumers plan to buy their celebration supplies at a grocery store, 1 in 2 at mass retailers, and 1 in 5 at club stores.

Labor Day Purchases

% of Labor Day Celebrators

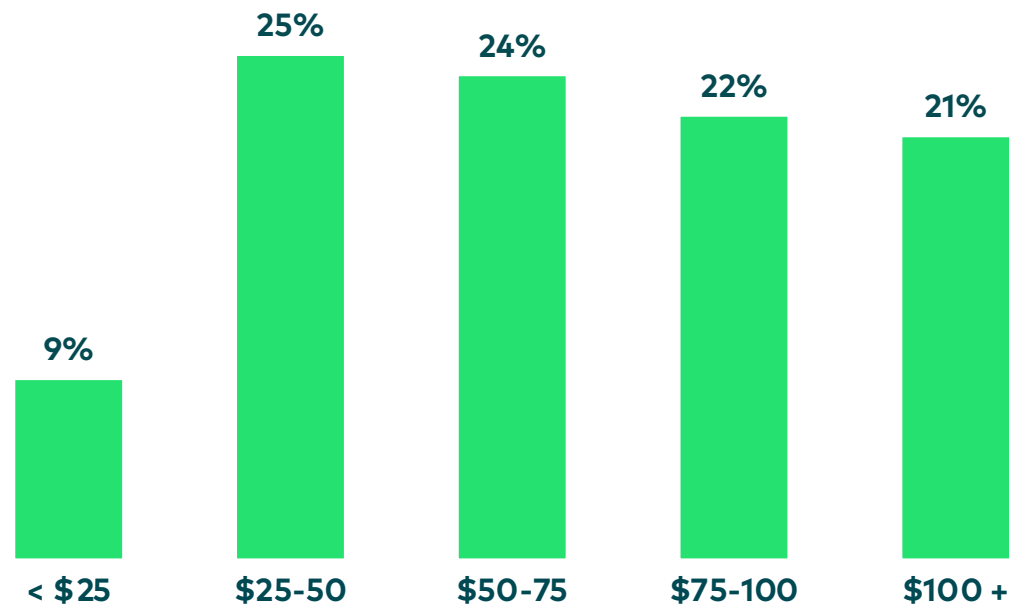


1 in 4 consumers are planning to spend more this Labor Day

While two-thirds of Labor Day shoppers expect to spend the same as they have in years past, one-fourth say they expect to spend more on this year's celebrations. Half say they'll likely spend between \$25 and \$75.

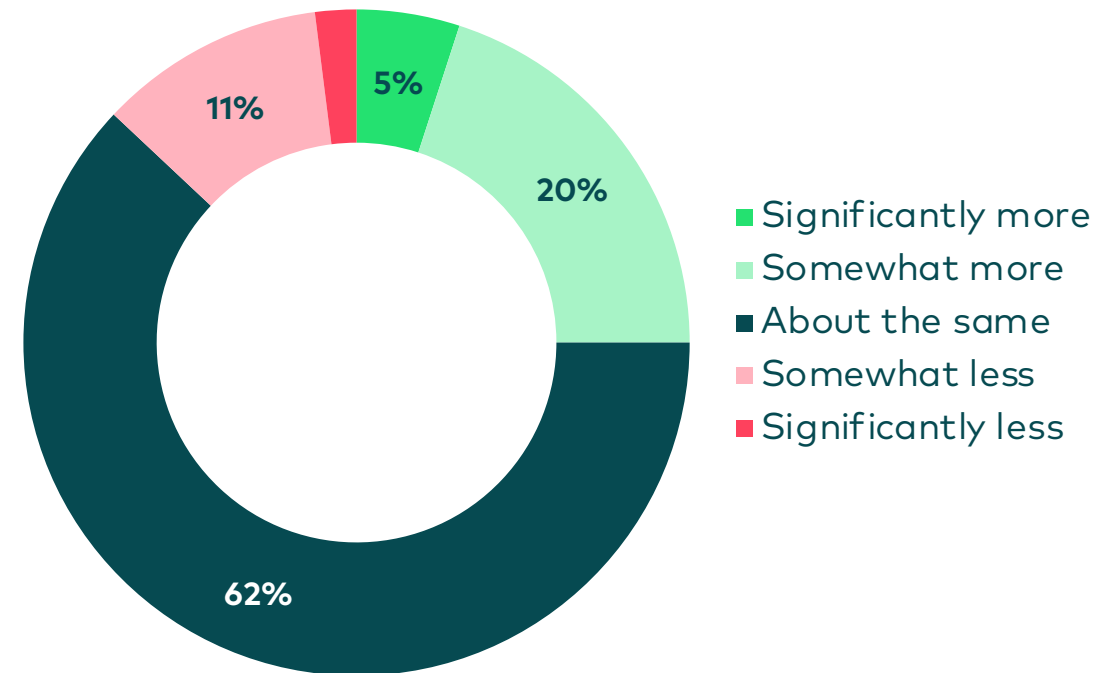
Labor Day Spending

% of Labor Day Celebrators



2021 Expected Spend vs. Previous

% of Labor Day Celebrators





Want to know more?

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