



Update on Holiday Intentions:

Labor Day 2021

Shifts in Consumer Plans, June v. August



About the Survey

LABOR DAY 2021

The Numerator Labor Day survey is comprised to two waves of questions fielded to the same group of consumers two months apart (June 2021 & August 2021) asking about their Labor Day plans.

- **Survey Wave 1 – June**

Fielded to 1,006 consumers on 06/04/21

All consumers shared that they typically celebrate Labor Day

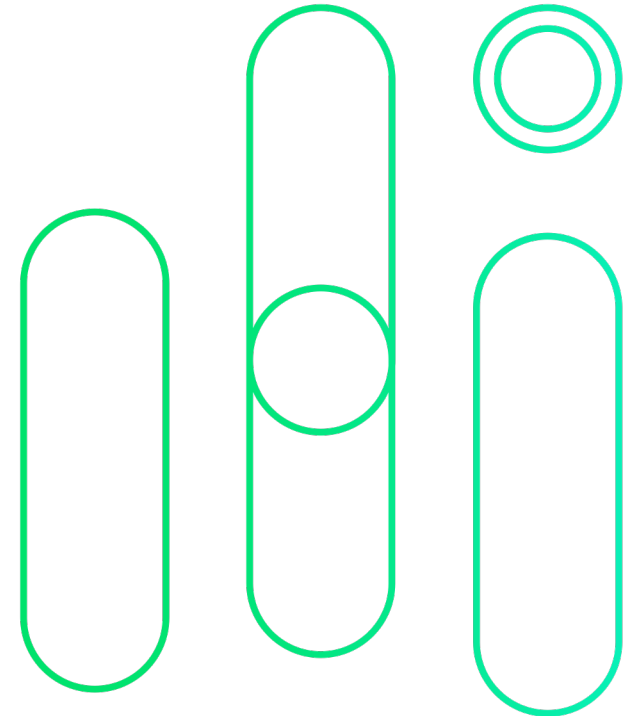
- **Survey Wave 2 – August**

Fielded to the same group of 1,006 consumers from Wave 1 on 06/04/21, with an 87% completion rate (n=871)

- **Included Views:**

Vaccinated shoppers vs. those who won't get the vaccine

Shoppers by US Region

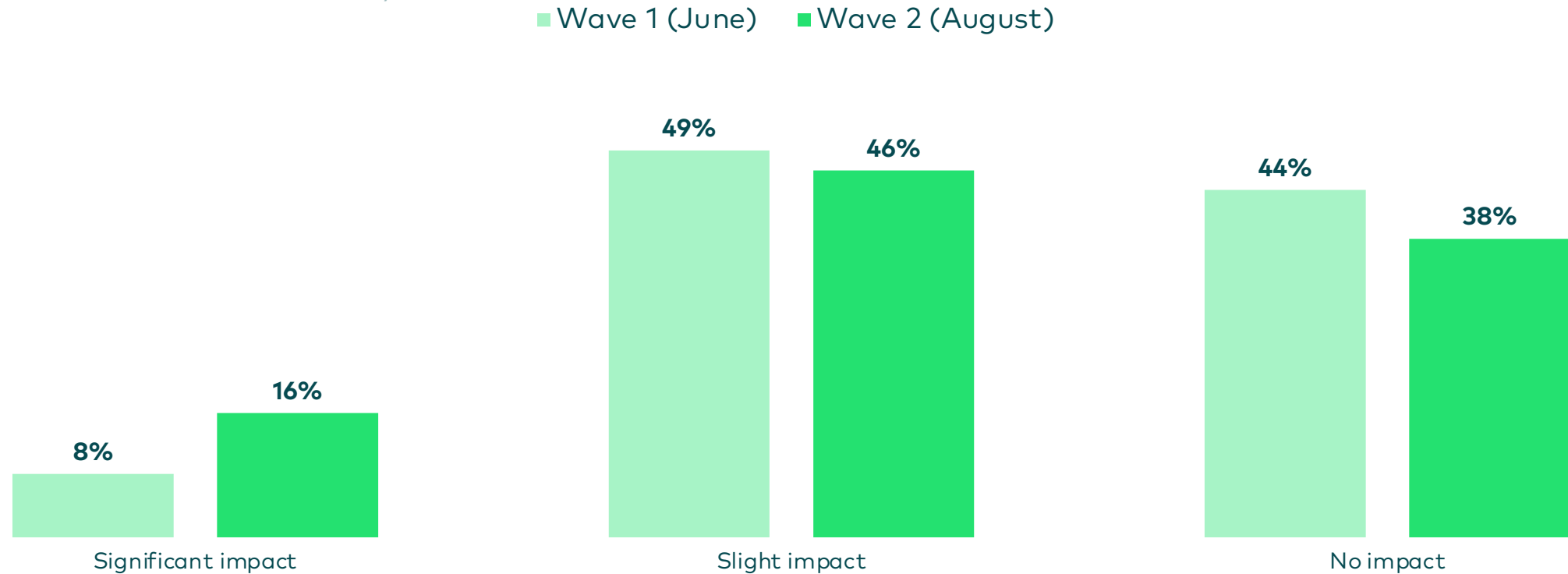


Sentiment has shifted since June, with more consumers now concerned about Labor Day COVID-19 impacts

The percentage of consumers who expect significant impact has doubled between the June and August, though over one-third of consumers still expect no COVID-19 impact.

Expected COVID Impact

% of consumers who celebrate Labor Day

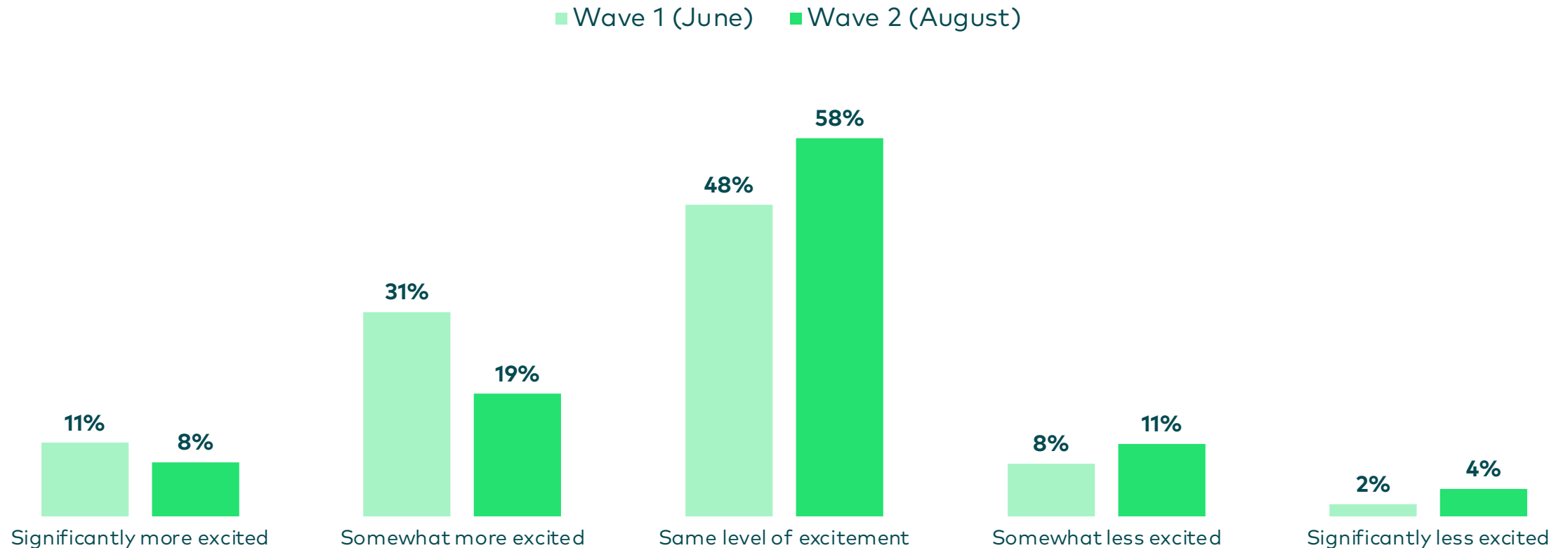


A subset of consumers are maintaining elevated levels of excitement for this upcoming Labor Day

Even as many have shifted to lower levels of excitement, 1 in 4 consumers remain optimistic and excited

Excitement vs. Previous Labor Days

% of Labor Day Celebrators



Numerator 2021 Q3 Holiday Survey 06/04/2021 (n=1,006) / Numerator Labor Day Holiday Survey 08/16/2021 (n=871)

What is your level of excitement for Labor Day this year compared to a typical year?

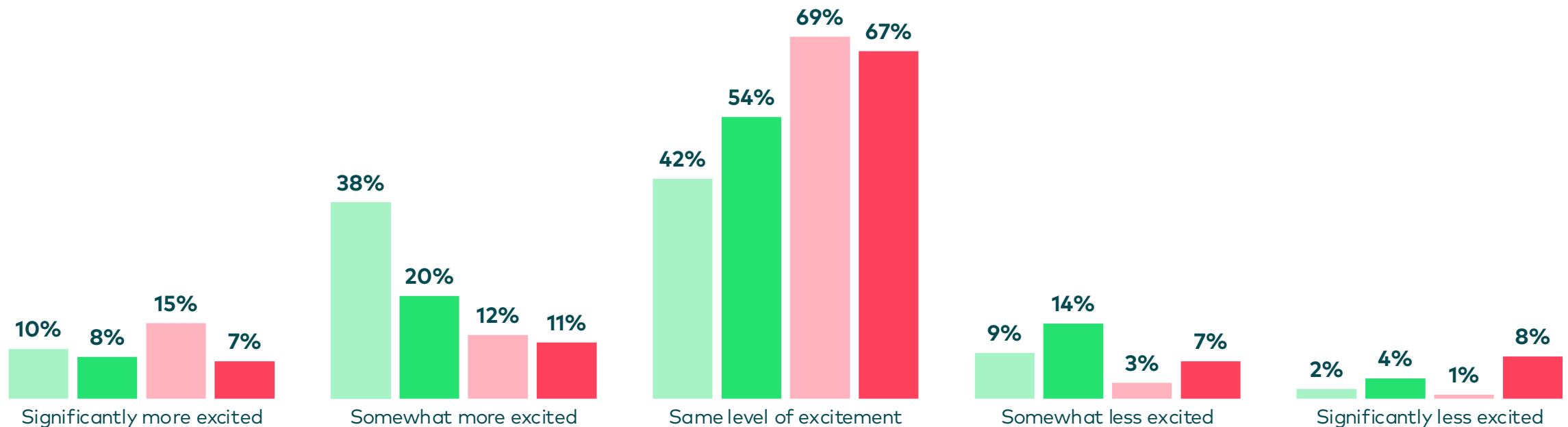
Vaccinated shoppers are seeing the largest decline in excitement

With those not getting the vaccine already having lower levels of excitement, those vaccinated showed the sharpest decline in excitement. Both groups saw an overall decrease in excitement compared to previous years.

Excitement vs. Previous Labor Days

% of Labor Day Celebrators

■ Vaccinated Shoppers (June) ■ Vaccinated Shoppers (August) ■ Won't Get Vaccine (June) ■ Won't Get Vaccine (August)

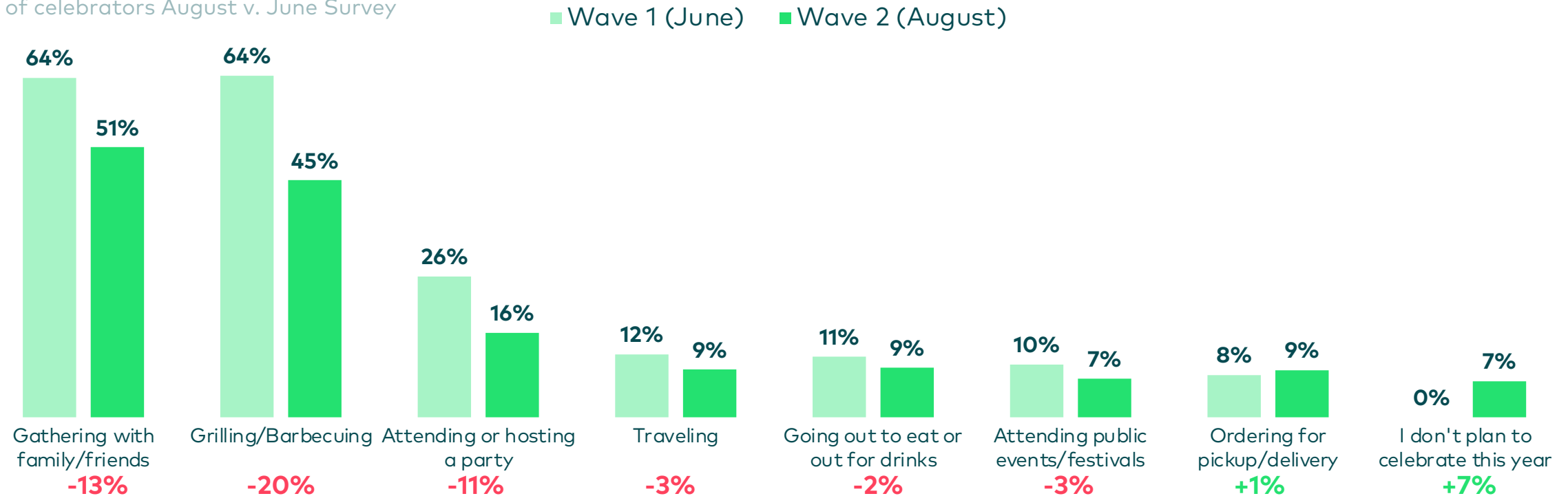


Labor Day plans are being dialed back amidst new concerns

Though half of consumers are still planning on gathering, there have been substantial declines for this activity, grilling, and attending/hosting a party. There has been an increase in consumers that plan to order-in alongside 7% of consumers who now say they no longer to plan to celebrate.

Labor Day Celebration Plans

% of celebrators August v. June Survey

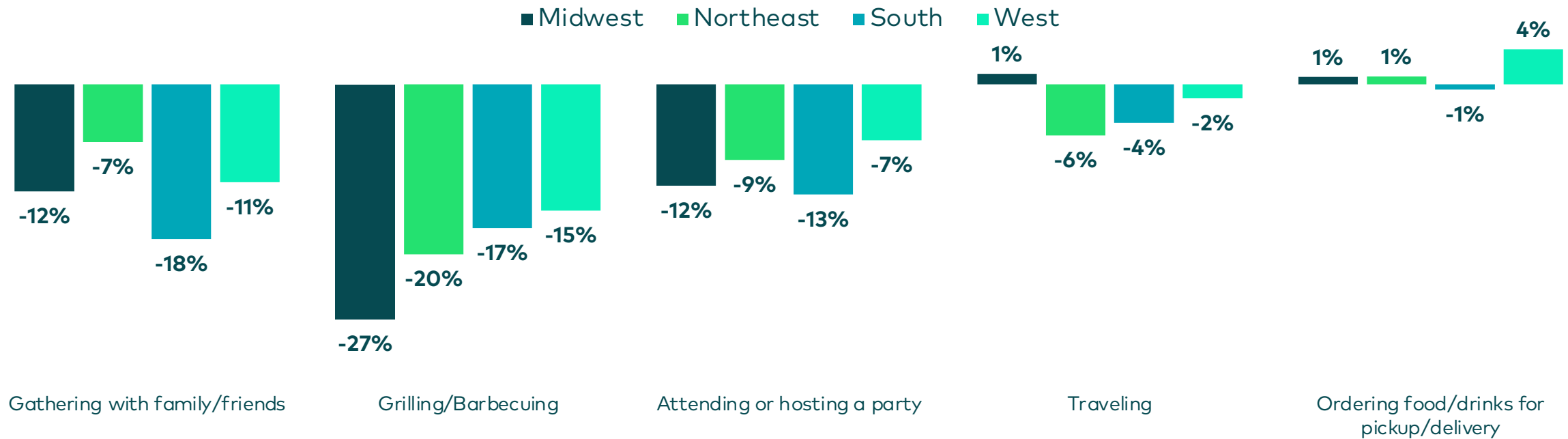


Regional Spotlight: Changes in Celebration Intentions

Midwestern consumers are seeing 1 in 4 opt out of their June plans to grill or barbecue. Southern consumers are leading the pack in percent of shoppers to look away from gathering or attending/hosting events. All regions apart from the South have seen an uptick in shoppers planning to order-in for pickup and delivery.

Labor Day Celebration Plans

Change in % by region, August v. June Survey



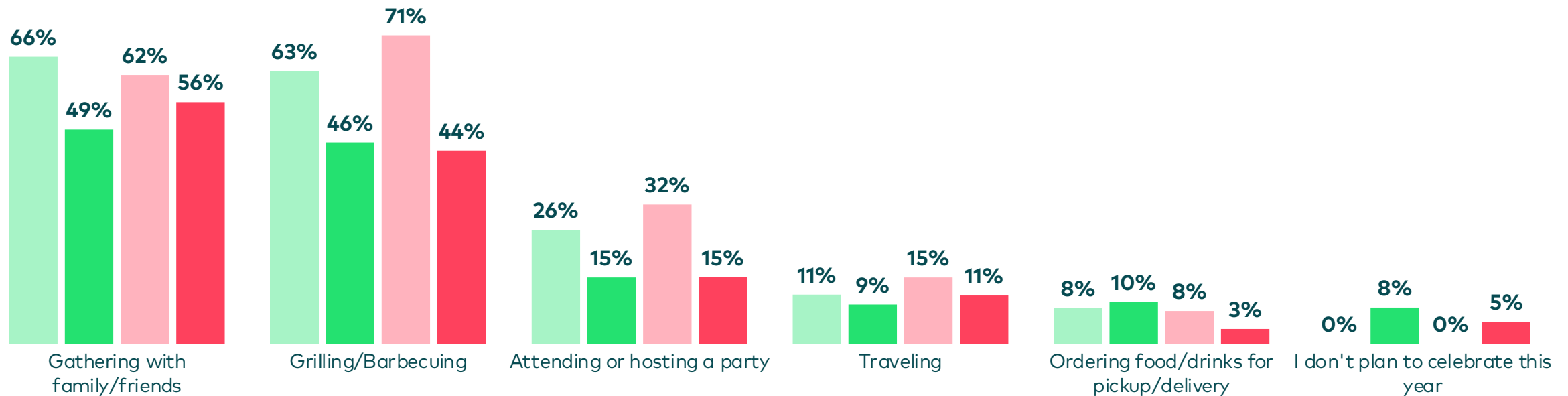
Vaccine Spotlight: Changes in Celebration Intentions

Both groups decreased overall intentions to gather, with vaccinated shoppers seeing sharper declines. Unvaccinated shoppers, however, see the most dramatic decline in those grilling out or attending/hosting a party. Both groups had a subset of consumers shift to having no plans to celebrate at all.

Labor Day Celebration Plans

% of celebrators by Vaccine Status, August v. June Survey

■ Vaccinated Shoppers (June) ■ Vaccinated Shoppers (August) ■ Won't Get Vaccine (June) ■ Won't Get Vaccine (August)

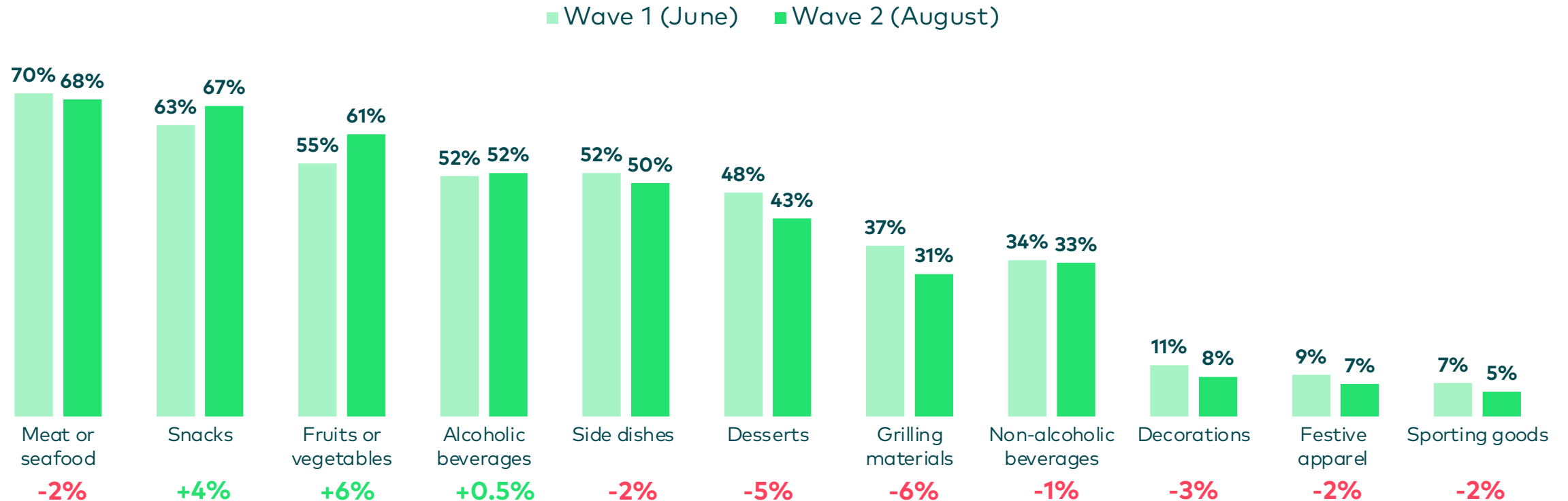


Consumers are elevating their snacking and healthy eating...

Despite modest declines in the likes of desserts and grilling materials, items like snacks, fruits and vegetables, and alcoholic beverages have seen increases between survey waves

Labor Day Purchase Plans

% planning to purchase



...and are opting for curbside and online ordering to account for new landscape

Even with 3 in 4 consumers still opting to shop at grocery stores, the last two months have seen some shift their shopping to alternative methods, especially online ordering, convenience, and home improvement.

Labor Day Planned Shopping

Index of August v. June Survey

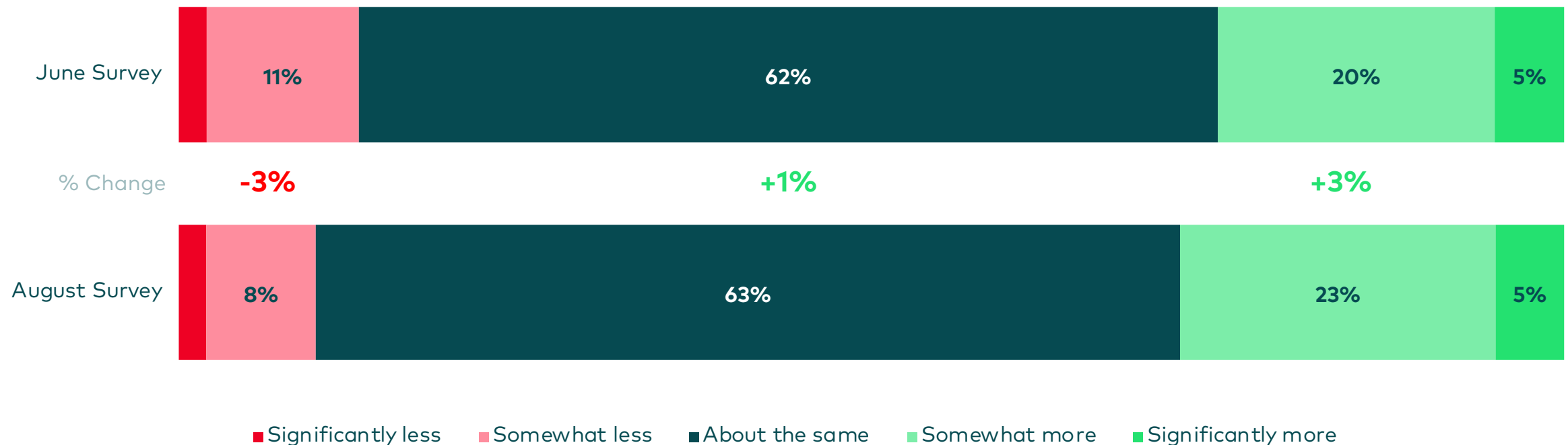


Contrary to plan shifting away from large gatherings, consumers are expecting to spend somewhat more

A large majority of shoppers are planning to spend about the same to previous years. However, 28% are expecting to spend more, up from 25% in the June Survey

Labor Day Planned Shopping

% of Labor Day Celebrators



Current Labor Day Expectations vs. Past Years



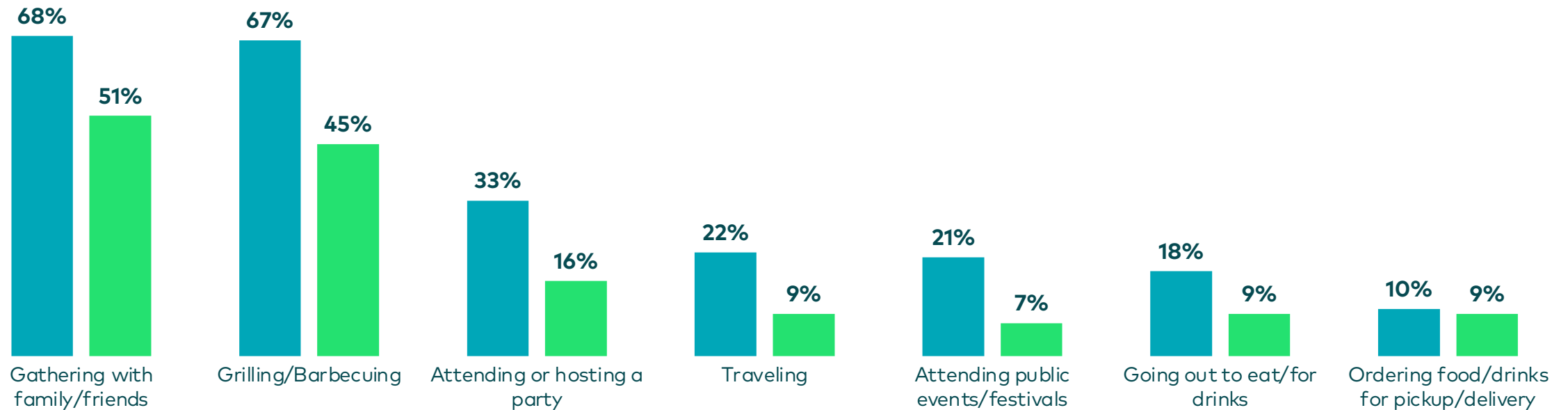
The declines between survey waves make this Labor Day even less reminiscent of pre-pandemic celebrations

With at least half of consumers not partaking in any of the below activities, celebrations will be confined, private, and limited.

Labor Day Celebration Plans

% of Labor Day Celebrators

■ Previous Years ■ This Year (2021)

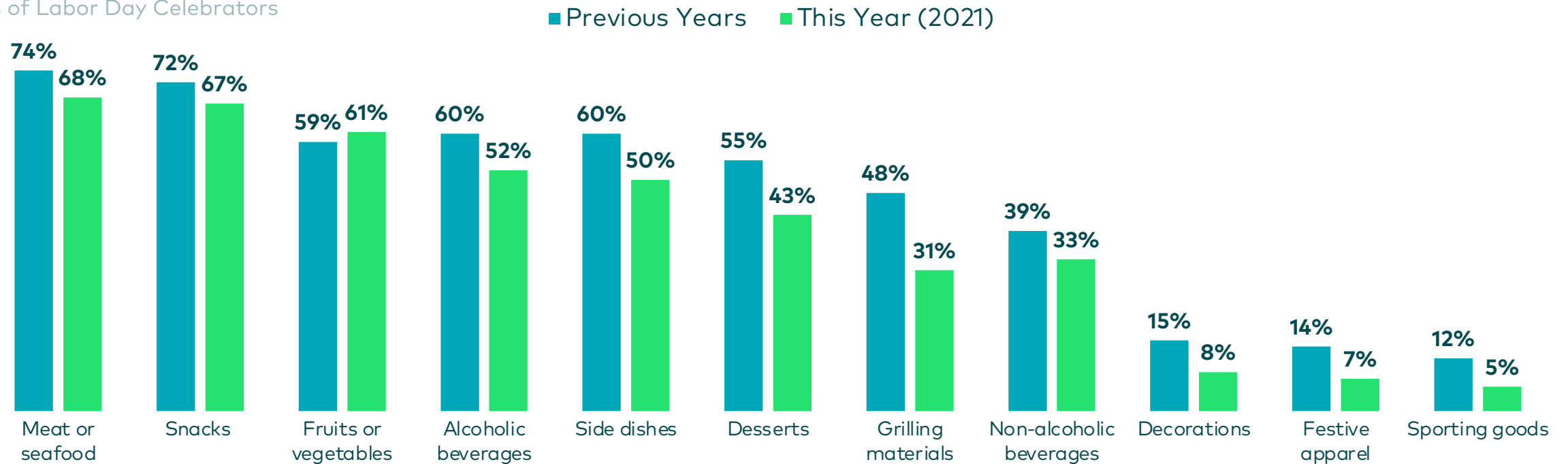


Consumers staying consistent with typical categories shopped

Categories such as meat or seafood, snacks, and fruits or vegetables are still seeing figures that align closely with pre-pandemic purchases

Labor Day Purchases

% of Labor Day Celebrators

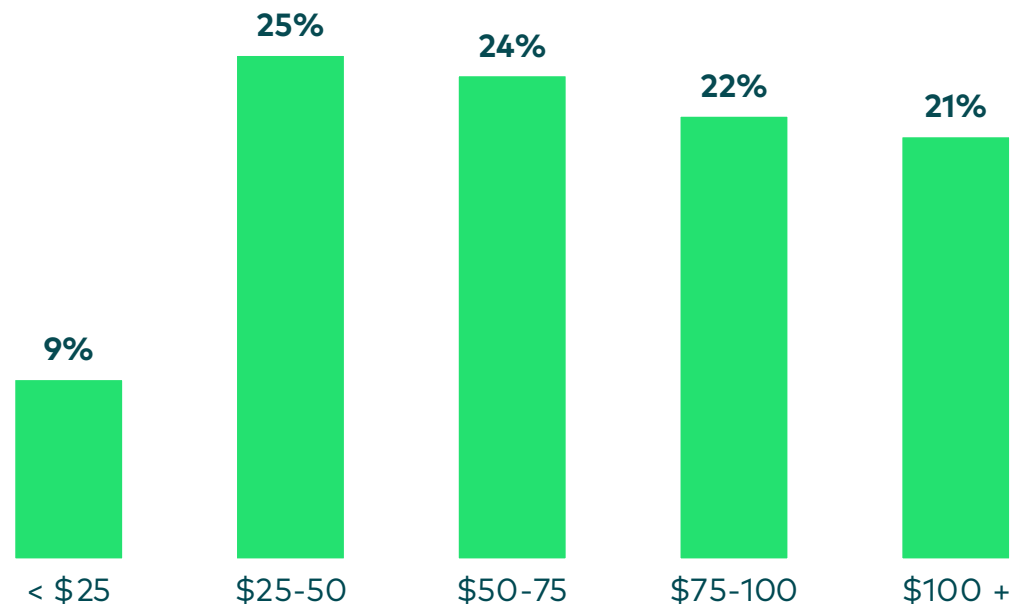


27% of consumers are planning to spend more this Labor Day

While 3 in 5 Labor Day shoppers expect to spend the same as they have in years past, over one-fourth say they expect to spend more on this year's celebrations. Half say they'll likely spend between \$25 and \$75.

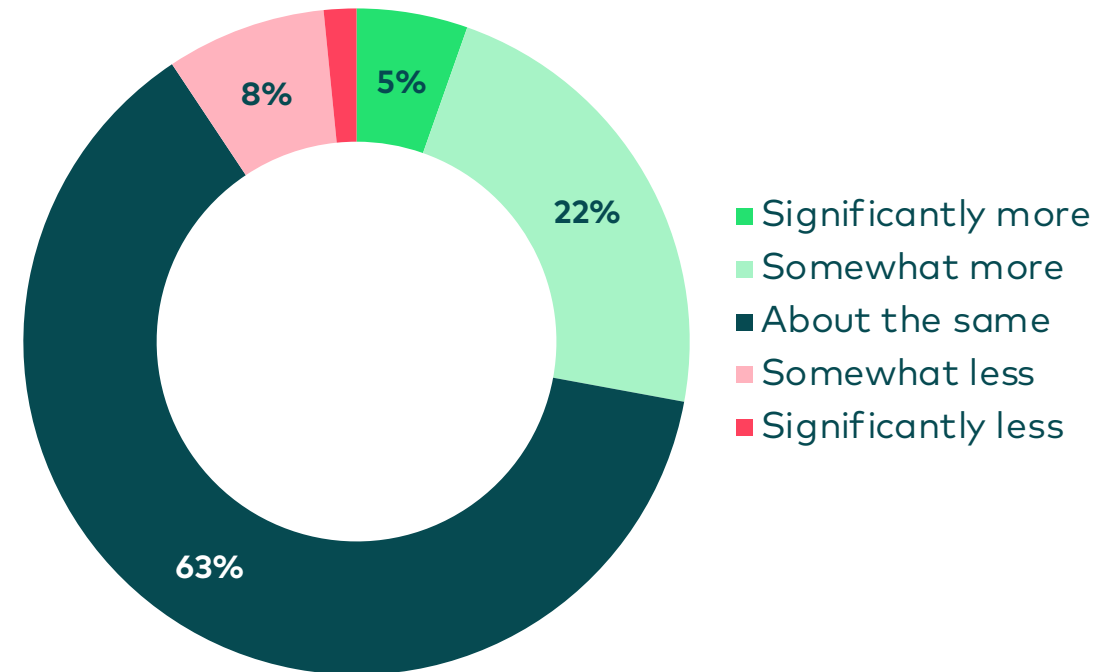
Labor Day Spending

% of Labor Day Celebrators



2021 Expected Spend vs. Previous

% of Labor Day Celebrators





Want to know more?

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