

2020 HOLIDAY PLANNING

CANADIAN CONSUMER INTENTIONS SURVEY

As the holiday season draws near, there's little doubt that upcoming events are going to look different than they have in years past. To help Canadian brands and retailers better inform their end-of-year strategies, we've surveyed over 1,000 past holiday shoppers to understand how they expect to celebrate—and shop for—the remaining holidays of 2020.

HOLIDAYS COVERED

Labour Day | Thanksgiving | Halloween | Diwali
Christmas & Hanukkah | Boxing Day | New Year's

TOPICS COVERED

CELEBRATING

How are consumers planning to celebrate upcoming holidays and how will that inform their shopping behaviour?

SHOPPING

Will consumers be purchasing anything for their holiday celebrations, and how will their shopping habits differ from years past?

SPENDING

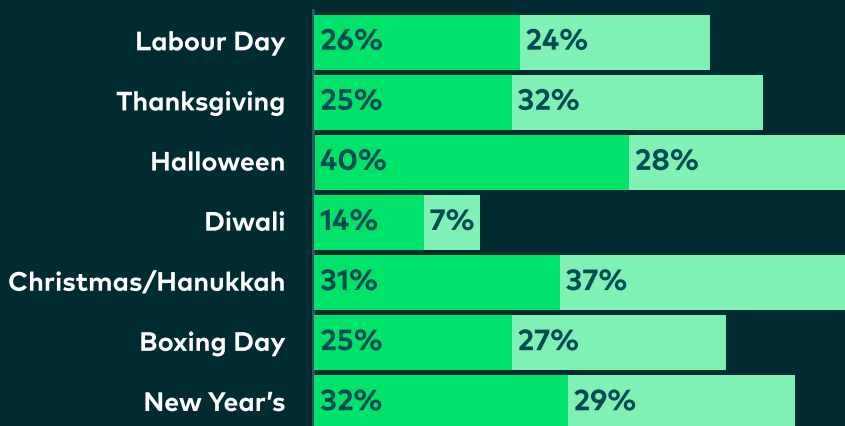
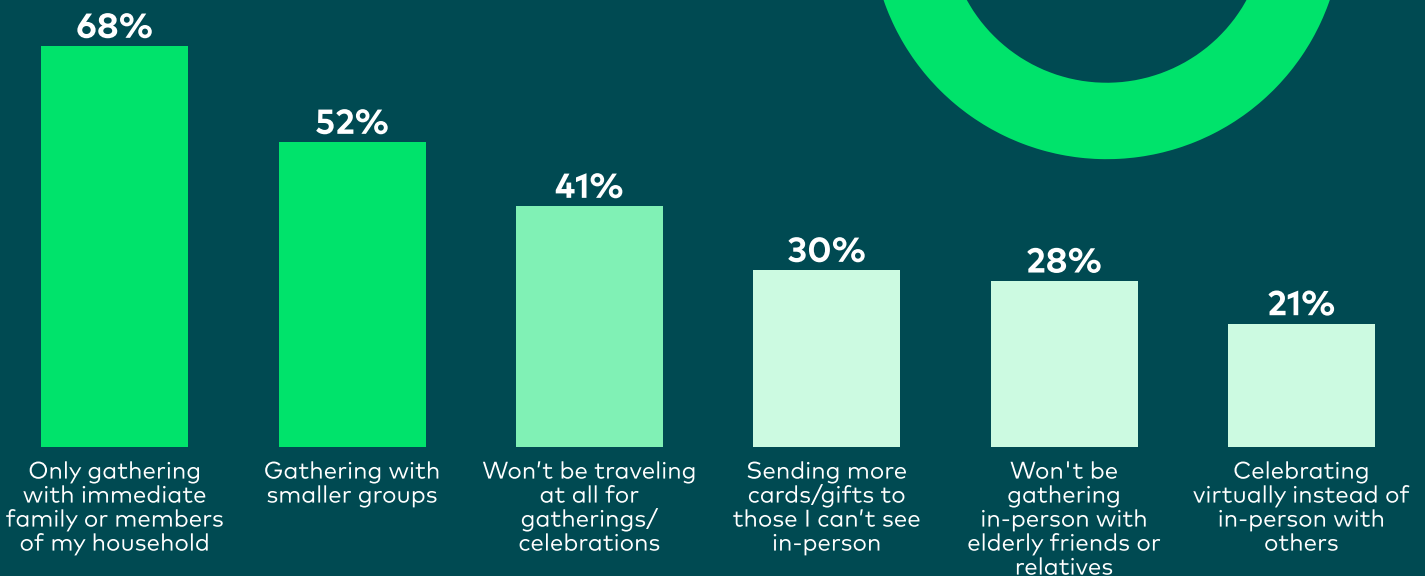
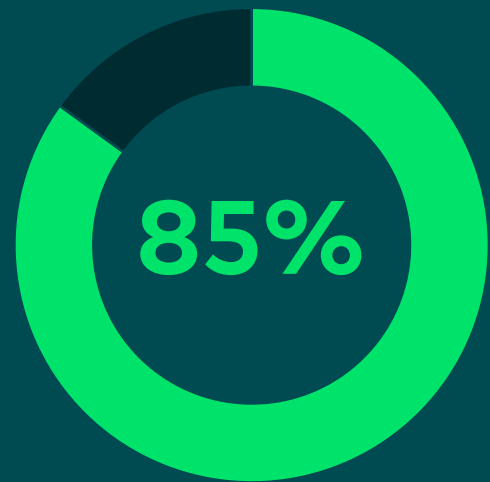
How will spending compare to last year's holidays?



CELEBRATING

How people choose to celebrate— or not celebrate— upcoming holidays underpins all of their shopping behaviours.

85% of consumers expect they will be celebrating at least some holidays differently this year— 14% expect to celebrate every holiday differently through the end of the year. The most common differences will be **limiting gatherings** to immediate family or household members and **keeping group sizes small**.



Very Different
Somewhat Different

Over half of consumers for every holiday except Diwali anticipate celebrating differently this year.

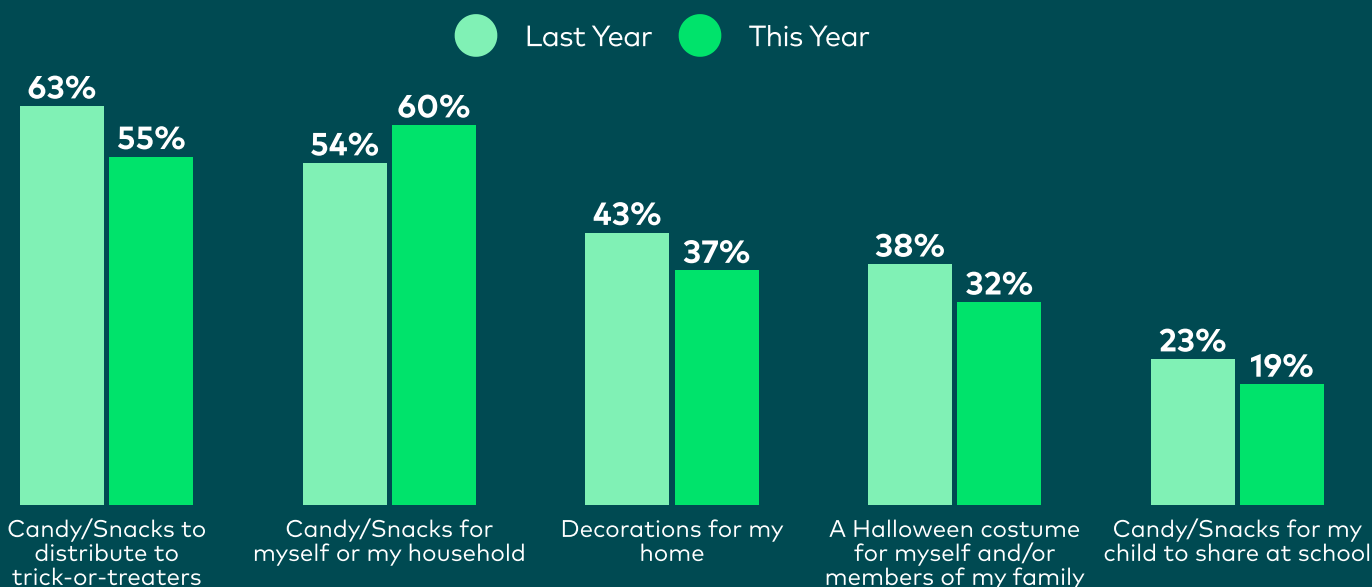


Brands and retailers should prepare to cater to smaller, more **intimate gatherings**. Travel will be limited, so consumers will be looking for ways to **celebrate at home**, and they'll also be looking for creative ways to stay connected with friends & family **from a distance**.

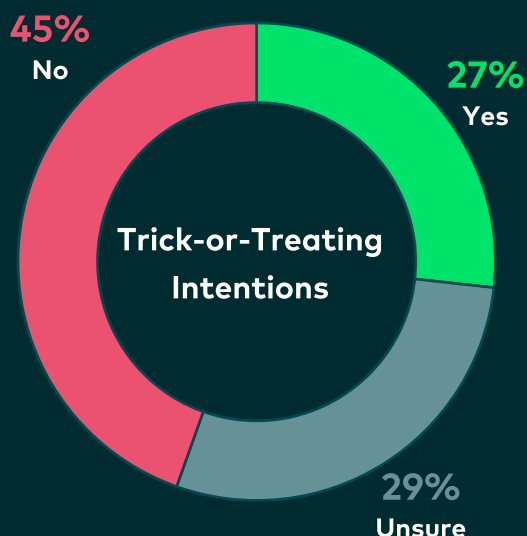
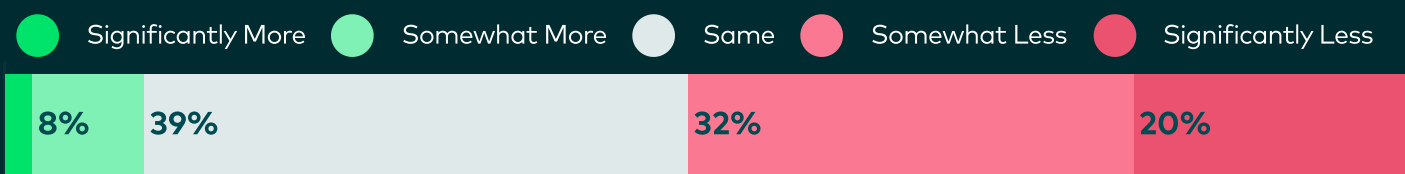
CELEBRATING: HALLOWEEN

Given the public & communal nature of most Halloween celebrations, it's no surprise that this is one of the holidays most likely to be celebrated differently this year.

The number of households planning to purchase Halloween candy & snacks to distribute to **trick-or-treaters** or at their **children's school** are down this year versus last. At the same time, those intending to purchase for **household consumption** are up slightly, likely to compensate for missed trick-or-treating opportunities.



Candy Buying Intentions



While the increase in candy purchases for household consumption may offset declines in other areas, as a whole, candy sales are expected to be down this year. **52%** of shoppers plan to buy less candy this Halloween than they did last, driven in large part by an expected lack of trick-or-treating.

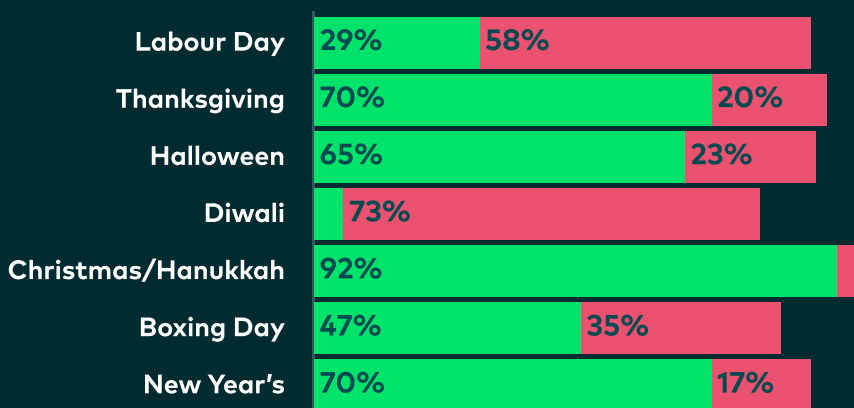
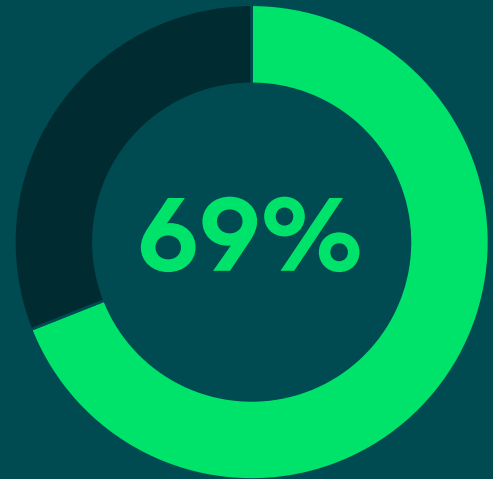
When asked if anyone in their household participated in trick-or-treating last year, **60%** said yes; this year, only **27%** plan to, with another **29%** unsure.



SHOPPING

When, how & what consumers buy for upcoming holidays will vary drastically from years past, with some choosing not to shop at all.

69% of consumers expect their shopping habits to differ for upcoming 2020 holidays. The most common differences will be **making fewer in-store trips**, primarily **shopping online** for delivery, and **avoiding popular shopping times & large crowds** in-store, something that will be particularly impactful for big in-store events like Black Friday or Super Saturday.



● Shopping
● Not Shopping

Halloween stands to be hit the hardest, down **11%** in number of consumers planning to shop.

Diwali is not typically a large driver of shopping behaviour, so will see less impact.



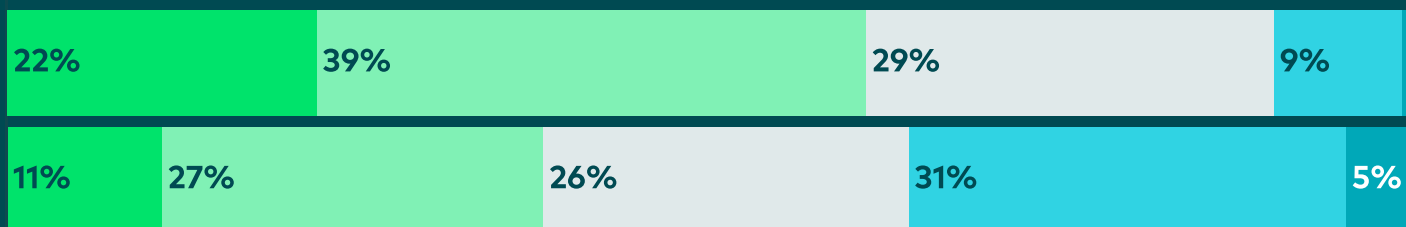
Brands and retailers can expect **smaller crowds** in-store this year and should prepare for **heavy online sales**. While some holidays will see fewer shoppers overall, others will simply **look different**.

SHOPPING: HOLIDAY GIFTS

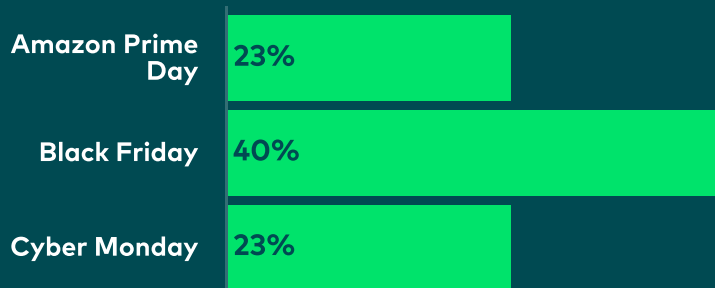
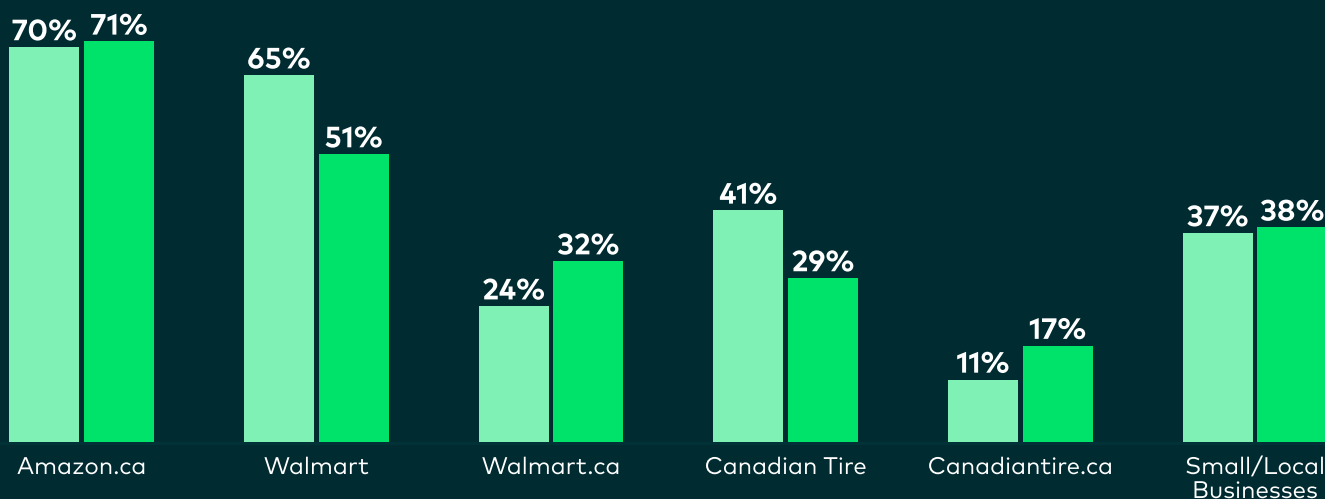
While the majority of consumers still plan to celebrate and shop for Christmas & Hanukkah, there are big changes coming for the biggest shopping period of the year.

More than a third (**36%**) of consumers plan to do all or most of their holiday shopping online this year, more than triple last year's **10%**. These intentions are evident in the specific retailers at which individuals plan to buy gifts; intentions to shop at Walmart and Canadian Tire stores were down, while their respective **websites were up**.

- Exclusively in-store
- Primarily in-store, some online
- Equal mix of in-store and online
- Primarily online, some in-store
- Exclusively online



- Last Year
- This Year



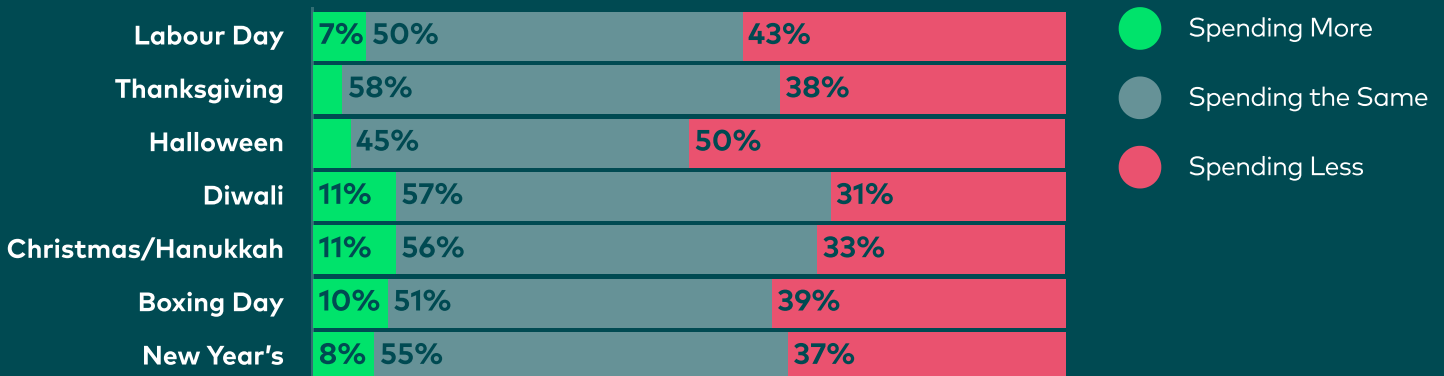
Shoppers are most likely to purchase their holiday gifts on **Black Friday**, though roughly 1 in 5 were also likely to buy on **Amazon Prime Day** or **Cyber Monday**. For those planning to shop on Black Friday, 82% intended to do so online, while only 44% thought they'd go in-store.



SPENDING

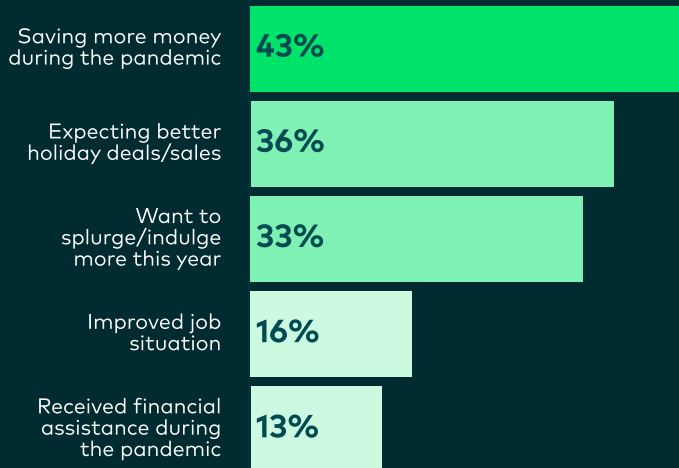
If consumers decide to shop at all, their spending will likely be lower this year than it has been previously.

For all upcoming holidays, at least **1 in 3** consumers intend to **spend less** than they did the previous year; for Halloween, this number was **1 in 2**. There were a small number of consumers expecting to **spend more**— Diwali, Christmas & Hanukkah, and Boxing Day were the most likely holidays to see a spending boost among select consumers.

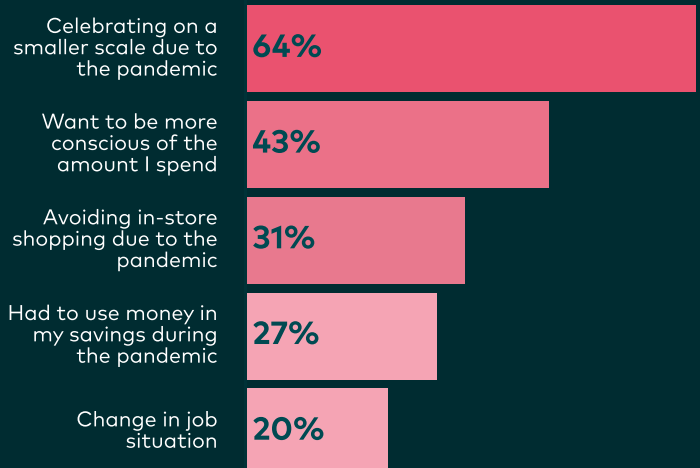


The most likely reasons given for spending more on given holidays were **saving money during the pandemic** due to fewer activities being available and the expectation of **better holiday sales & deals** this year. Those spending less will primarily be driven by **smaller scale** celebrations that require fewer supplies, and also being **budget-conscious**.

Of those who expect to spend **more...**



Of those who expect to spend **less...**



Despite some consumers with pent-up buying power, overall holiday spending will be **down across the board** this year. Brands & retailers will need to **reimagine holiday celebrations** and sell that vision to consumers order to capture levels of spend closer to years past.