



2021 Canada Holiday Consumer Intentions

Winter & Spring Holidays

Valentine's Day • St. Patrick's Day • Easter

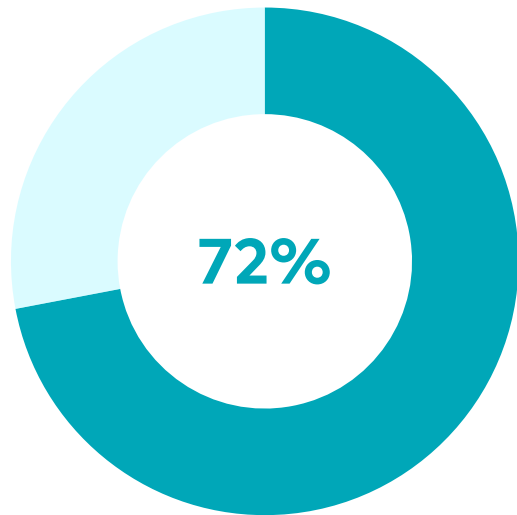


Numerator Holiday Intentions Study

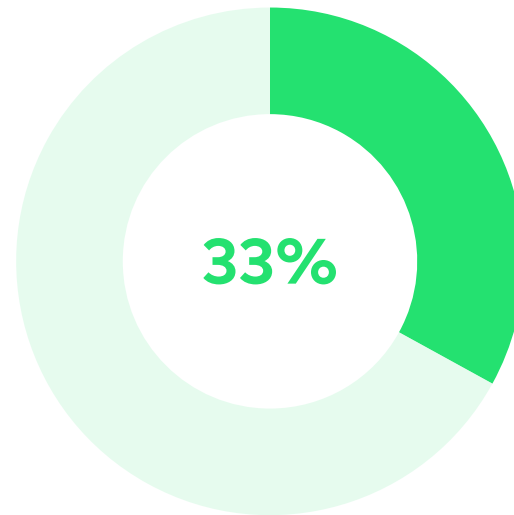
The Q1 Holiday Intentions survey was fielded to 1,500 members of Numerator's Canadian OmniPanel on 02/02/21, and covers Valentine's Day, St. Patrick's Day and Easter. All were asked which of the of these holidays they typically celebrated & were then asked more in-depth about their 2021 plans for one of their selected holidays.

% of consumers who typically celebrate...

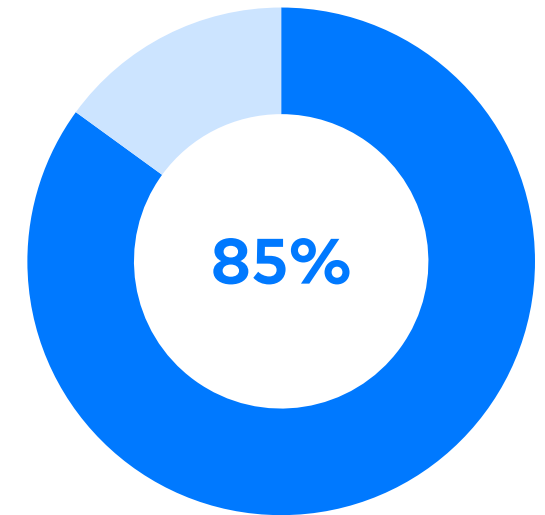
Valentine's Day



St. Patrick's Day



Easter

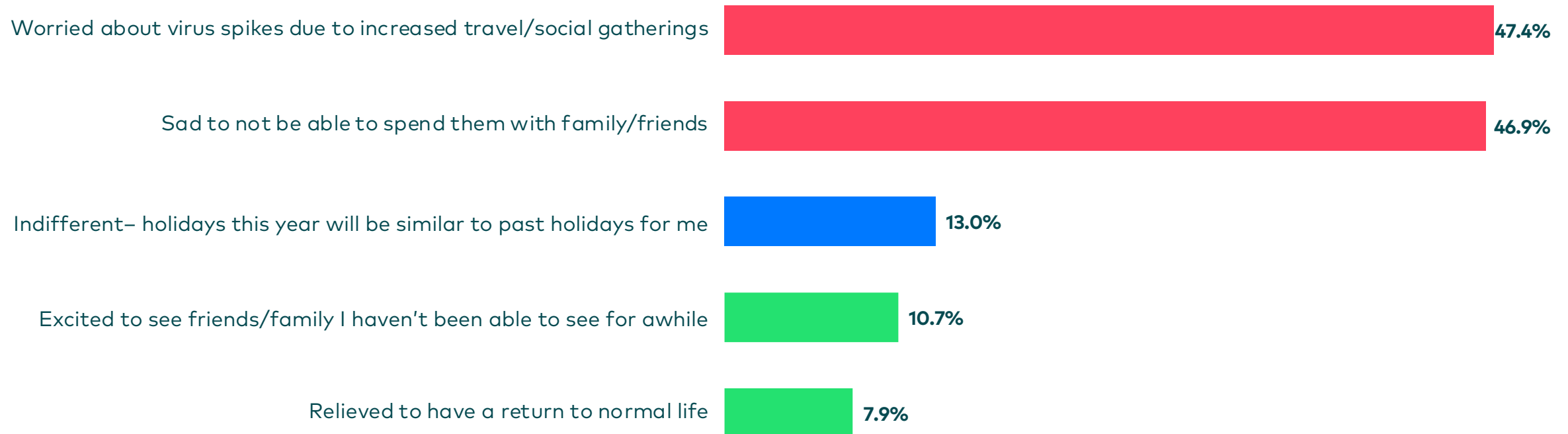


Consumers are anxious about upcoming holidays

With celebrations likely to remain heavily impacted by COVID-19 precautions and limitations, many consumers are experiencing negative feelings associated with Valentine's Day, St. Patrick's Day and Easter.

Feelings on Upcoming Holidays

% of consumers



Numerator Canada 2021 Q1 Holiday Survey 02/02/2021 (n=1,500) Overall, how do you feel about the upcoming holidays (Valentine's Day, St. Patrick's Day, Easter)? Select all that apply.



Valentine's Day

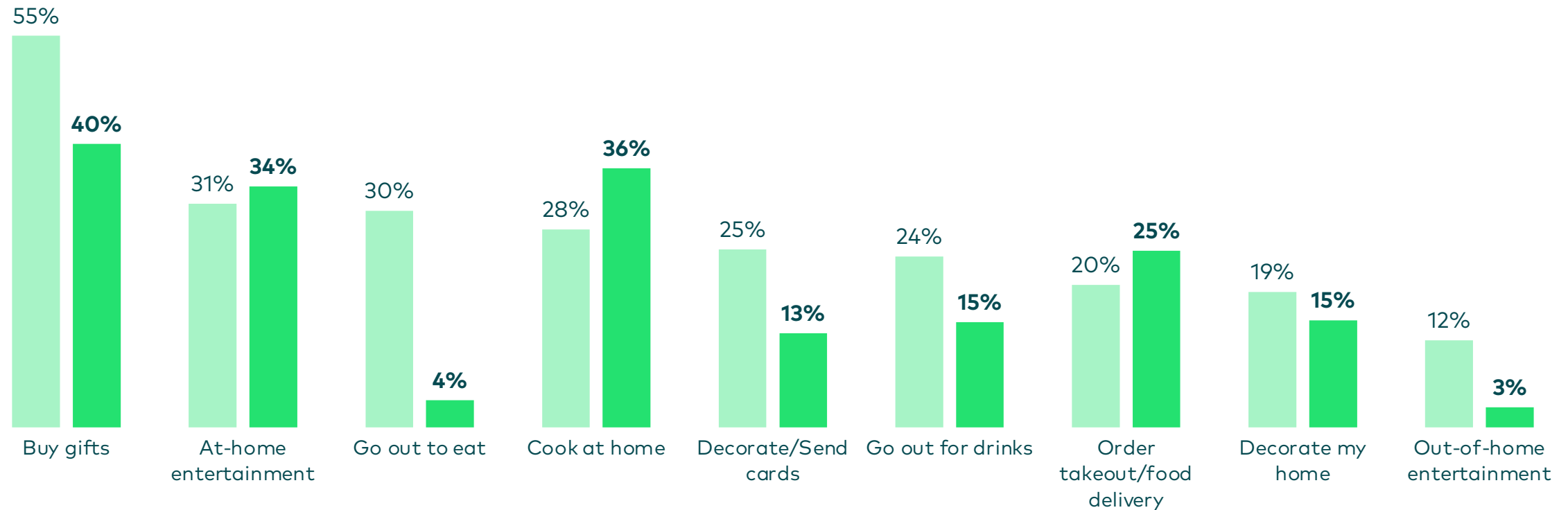
Valentine's Day will be an at-home affair this year

While Valentine's Day often serves as an opportunity for a date night out on the town, this year's celebrations are more likely to take place at home than at bars or restaurants, with consumers opting for cooking or takeout.

Valentine's Day Celebration Plans

% of Consumers who Celebrate Valentine's Day

■ Previous Years ■ This Year (2021)



Numerator Canada 2021 Q1 Holiday Survey 02/02/2021 (n=1500) | Valentine's Celebrators (n=500)

How have you celebrated Valentine's Day in the past few years? / How do you plan to celebrate this year? Select all that apply.

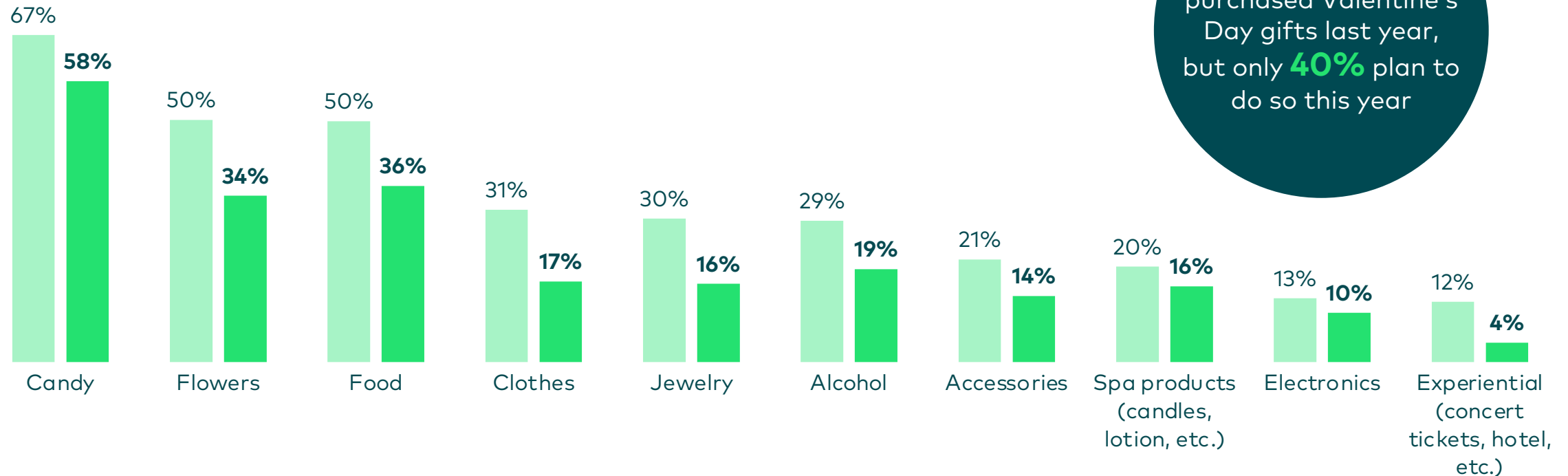
Consumers planning on fewer gifts this Valentine's Day

The overall number of consumers planning to buy Valentine's Day gifts is down significantly this year. When it comes to specific gifts, candy, food and flowers hold the top spots for gift choices year-over-year.

Valentine's Day Gifts

% of Valentine's Day Gift Buyers

■ Previous Years ■ This Year (2021)



Numerator Canada 2021 Q1 Holiday Survey 02/02/2021 (n=1500) | Valentine's Celebrators (n=500)

What kinds of gifts have you purchased for Valentine's Day in the past few years? / Which do you plan to buy this year? Select all that apply.

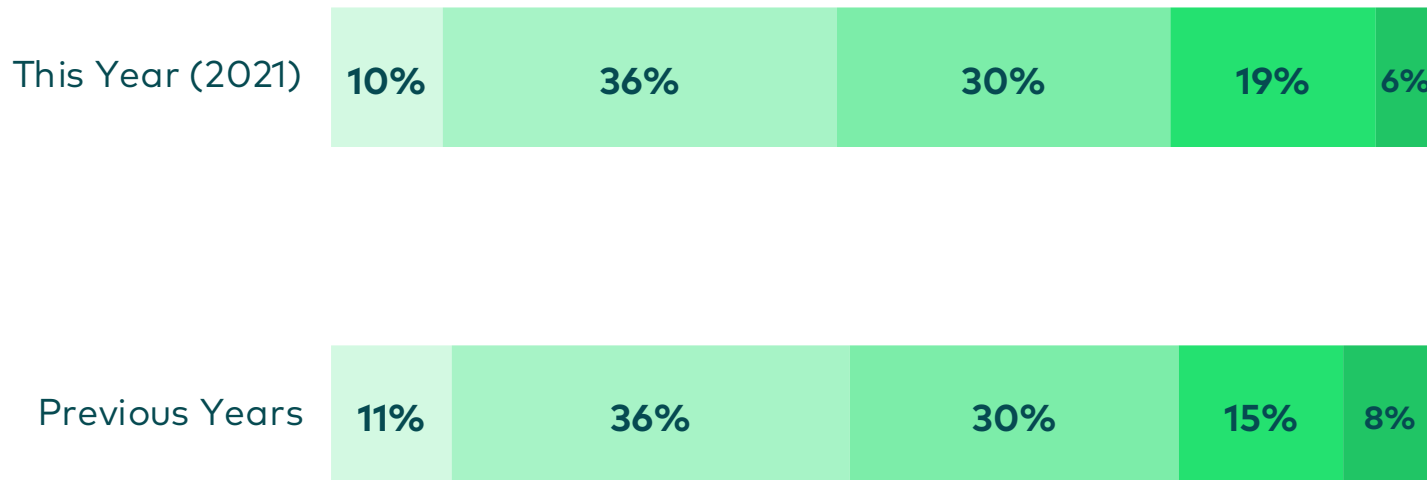
Those planning to buy gifts likely to spend similarly to 2020

While there are a significant number of consumers who will not purchase Valentine's Day gifts this year, those who do plan to buy gifts expect to spend similar amounts to last year, with most spending under \$100.

Valentine's Day Gift Spending

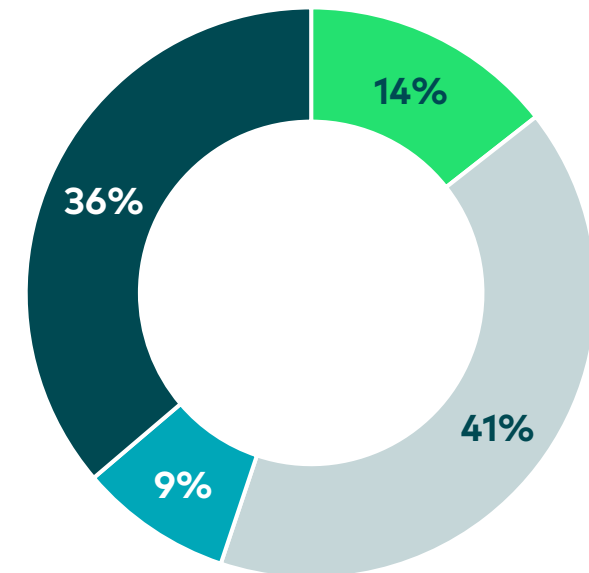
% of Valentine's Day Gift Buyers

■ \$20 or less ■ \$21 - \$50 ■ \$51 - \$100 ■ \$101 - \$200 ■ More than \$200



2021 Spend vs. Previous

■ Spending More ■ Spending Same
■ Spending Less ■ Not Buying

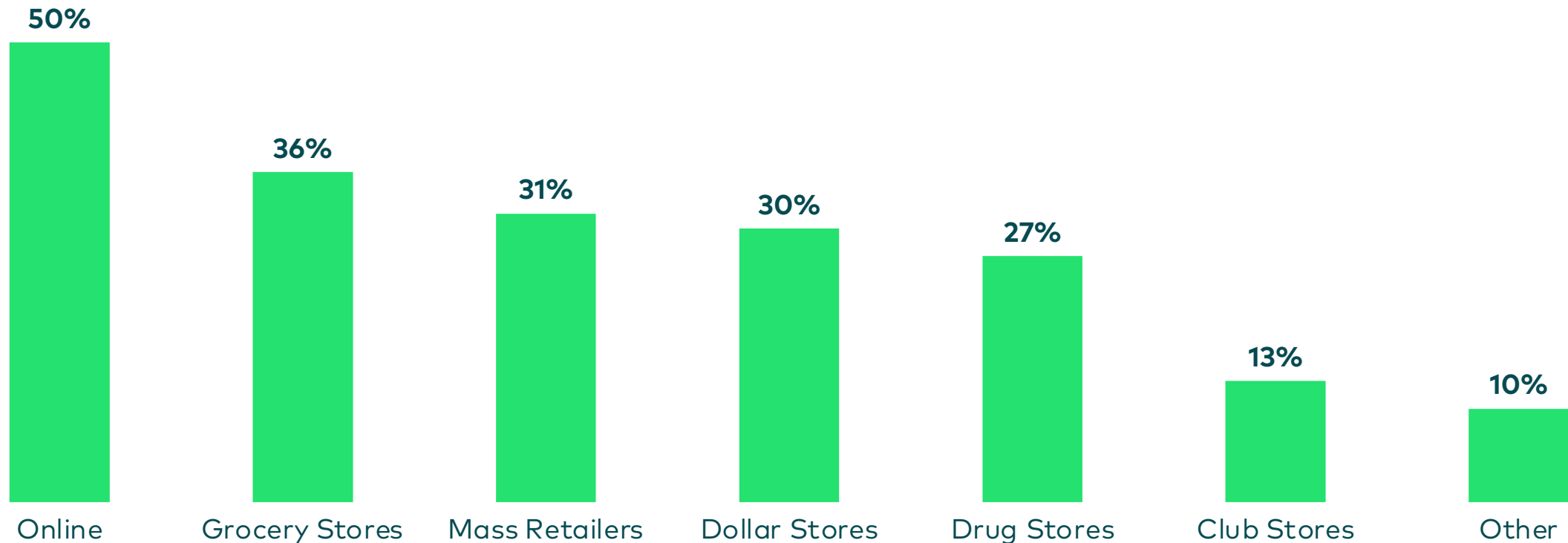


Online shopping the top choice for Valentine's Day gift buying

Half of those planning to buy Valentine's Day gifts say they are most likely to do online this year. About one-third of shoppers say they'll get their gifts at grocery stores, mass retailers, dollar or drug stores.

Valentine's Day Retailers

% of Valentine's Day Gift Buyers



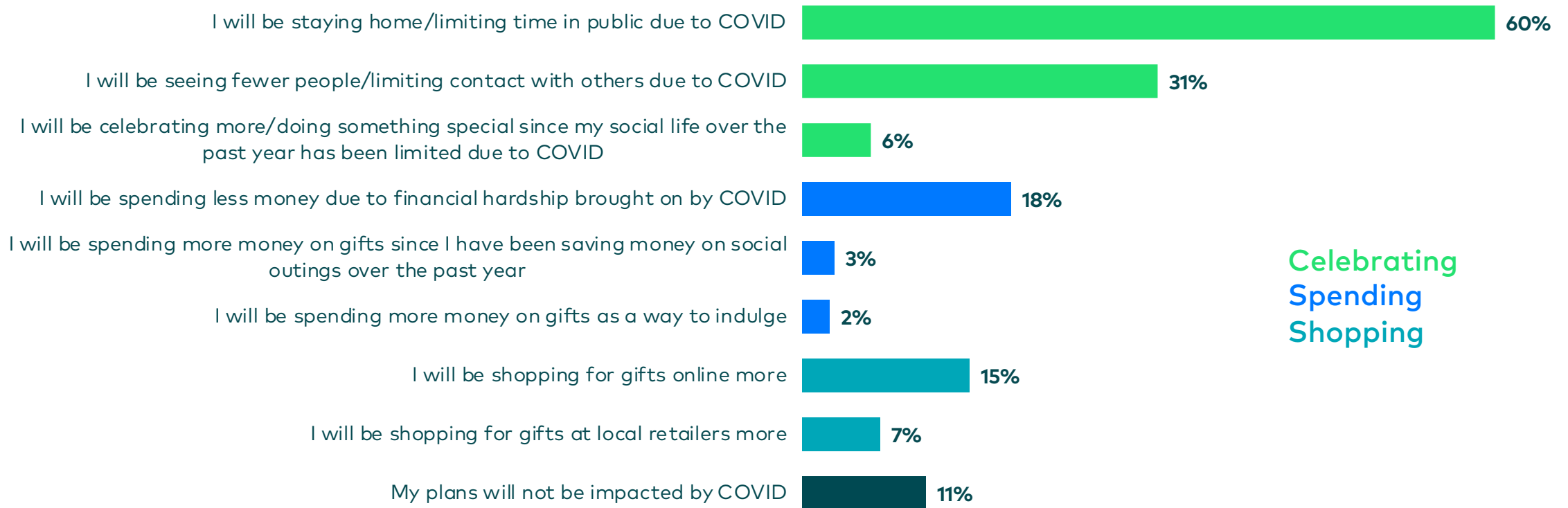
Numerator Canada 2021 Q1 Holiday Survey 02/02/2021 (n=1500) | Valentine's Celebrators (n=500)
Where will you buy your Valentine's Day gifts this year? Select all that apply.

Most consumers expect COVID-19 to impact Valentine's Day plans

Over half of consumers say they'll spend their Valentine's Day at home due to COVID-19, while one in five will be spending less money on their celebrations due to COVID-related financial hardships.

Valentine's Day COVID Impact

% of Consumers who Celebrate Valentine's Day





St. Patrick's Day

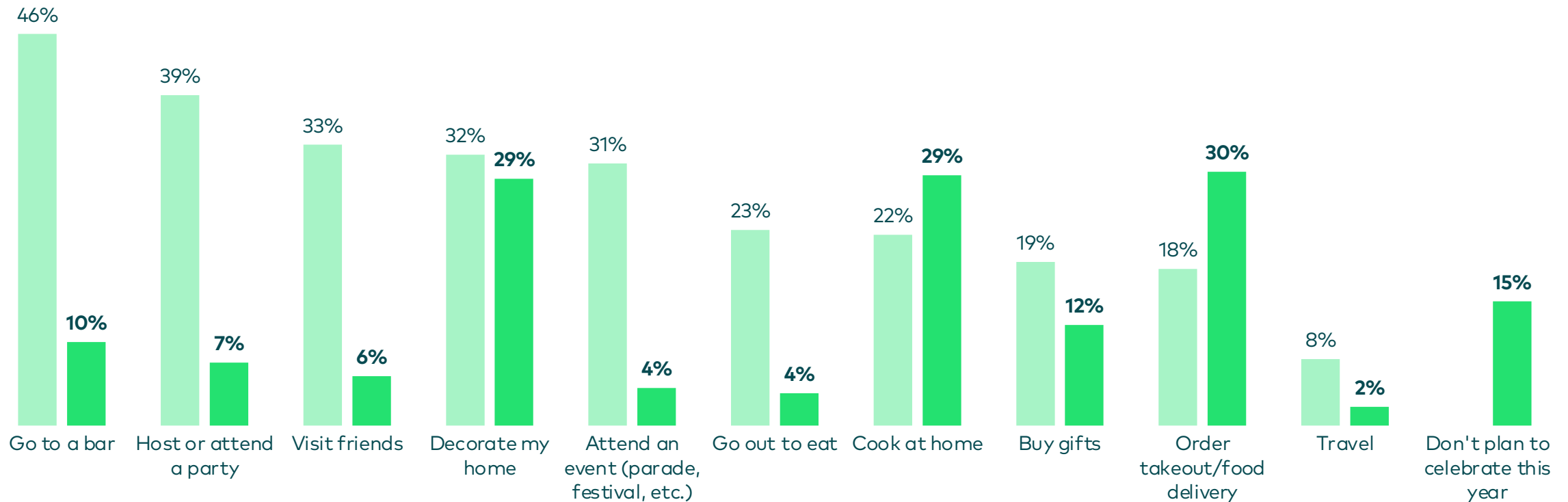
Most are planning to forego St. Patrick's Day public festivities

Half of St. Patrick's Day celebrators typically spend the holiday at bars, parties or parades, all of which will be limited this year due to COVID-19. Roughly one-third will decorate and enjoy meals at home instead this year.

St. Patrick's Day Celebration Plans

% of Consumers who Celebrate St. Patrick's Day

■ Previous Years ■ This Year (2021)



Numerator Canada 2021 Q1 Holiday Survey 02/02/2021 (n=1500) | St. Patrick's Day Celebrators (n=500)

How have you celebrated St. Patrick's Day in the past few years? / How do you plan to celebrate this year? Select all that apply.

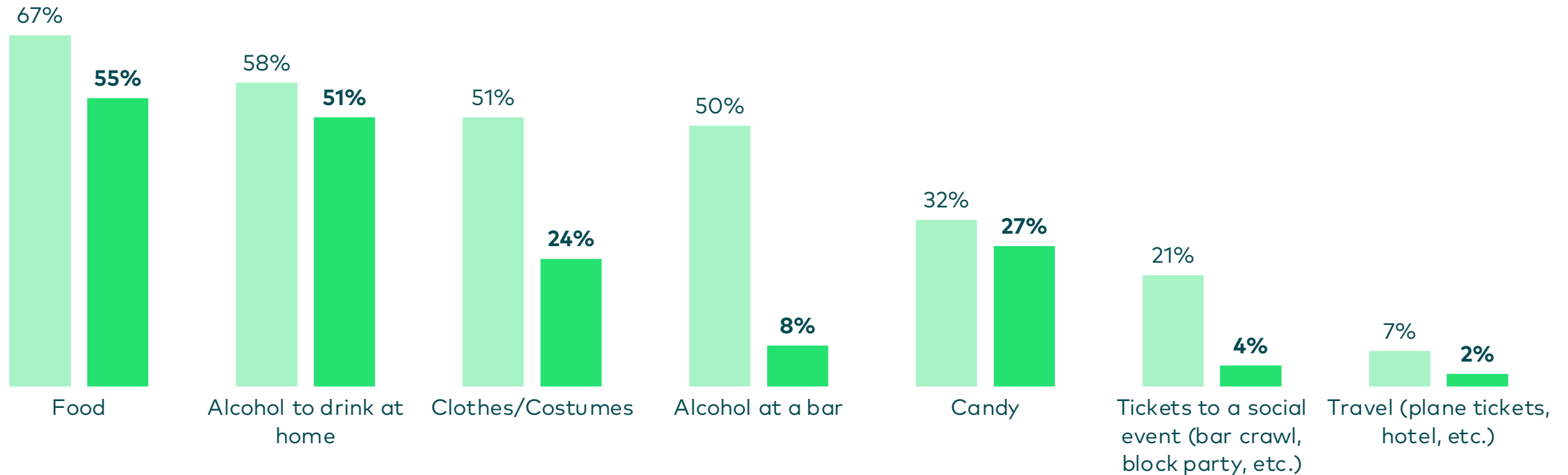
Fewer celebrations mean fewer supply needs

For a holiday typically enjoyed publicly or with larger groups, many consumers say they're less likely to purchase St. Patrick's Day supplies overall this year— both in public and for at-home consumption.

St. Patrick's Day Purchases

% of Consumers who Celebrate St. Patrick's Day

■ Previous Years ■ This Year (2021)



Numerator Canada 2021 Q1 Holiday Survey 02/02/2021 (n=1500) | St. Patrick's Day Celebrators (n=500)

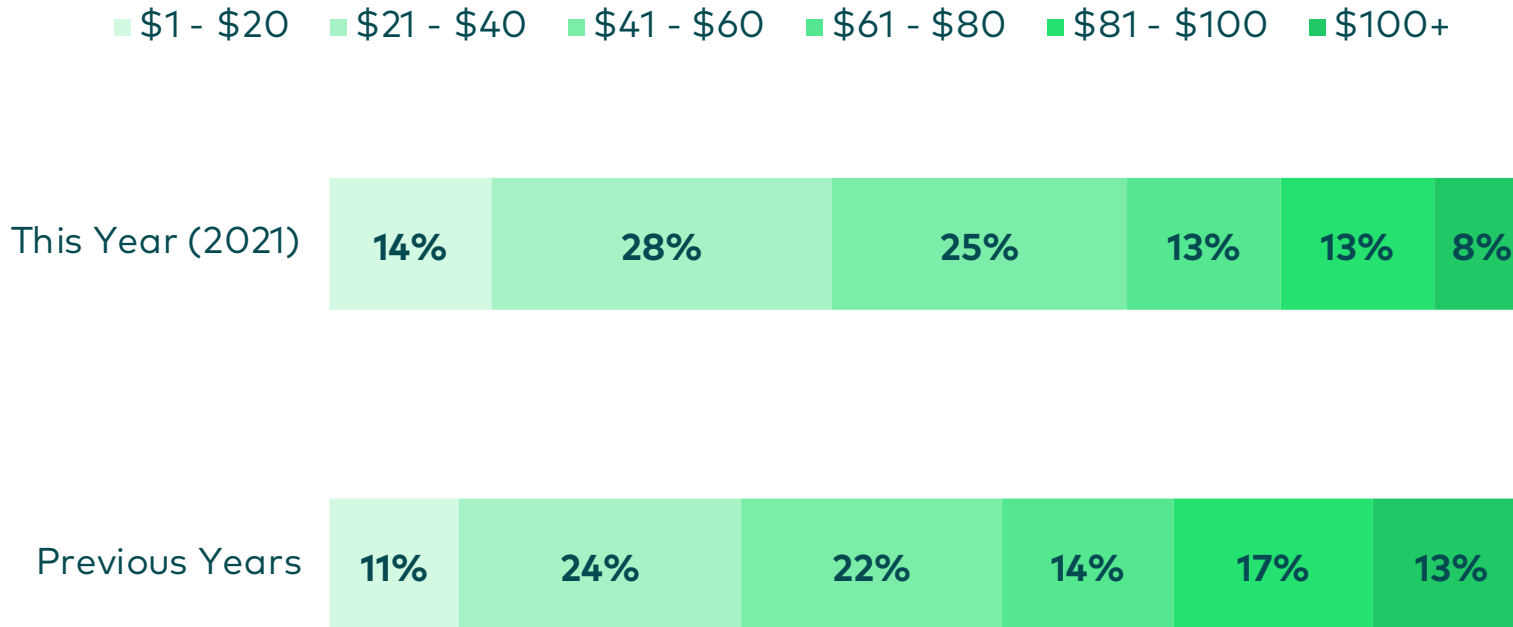
What have you purchased as part of your St. Patrick's Day celebrations in the past few years? What do you plan to buy this year?

Those planning to purchase supplies expect lower spending

Compared to prior years, those planning to make St. Patrick's Day purchases are likely to spend slightly less this year, though more than half think their spend will remain consistent.

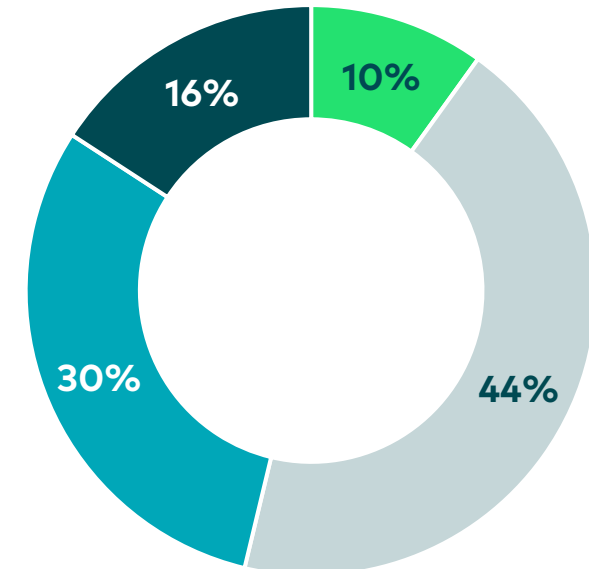
St. Patrick's Day Spending

% of Consumers who Celebrate St. Patrick's Day



2021 Spend vs. Previous

■ Spending More ■ Spending Same
■ Spending Less ■ Not Buying

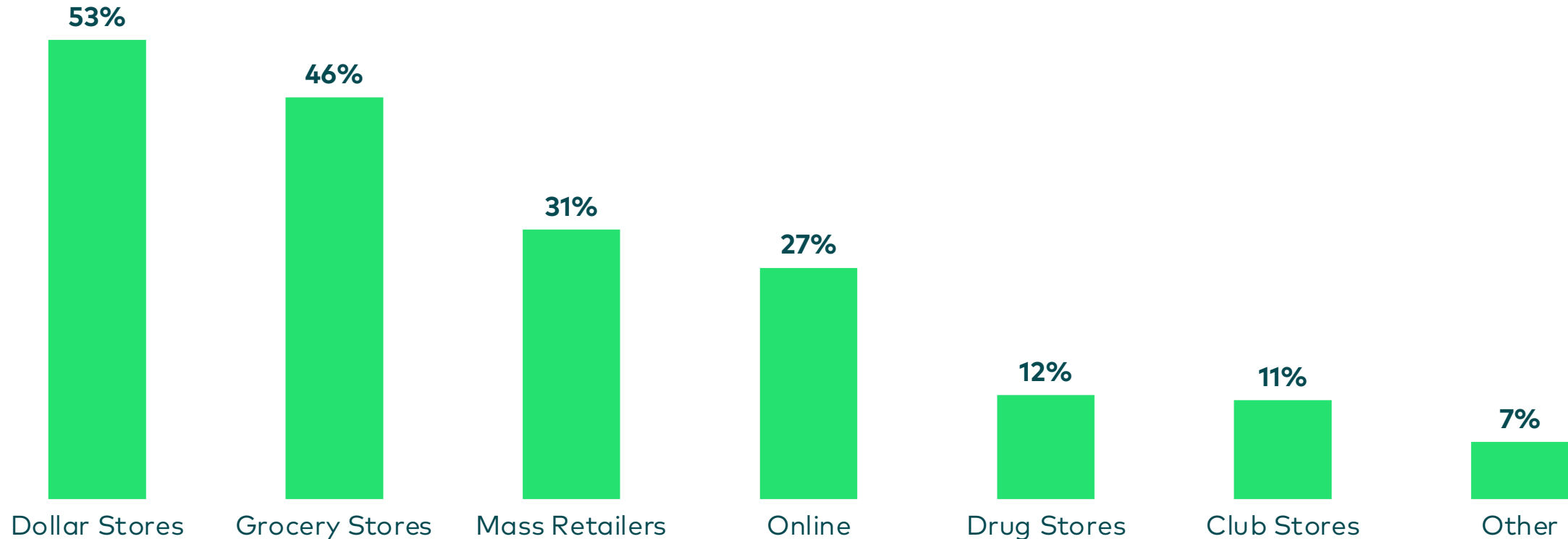


Dollar and grocery stores will be the go-to for supplies

About half of consumers making St. Patrick's Day purchases expect to do so at dollar stores, followed closely by grocery stores. Mass retailers and online shops are also expected to see moderate St. Patrick's Day sales.

St. Patrick's Day Retail Channels

% of Consumers who Celebrate St. Patrick's Day



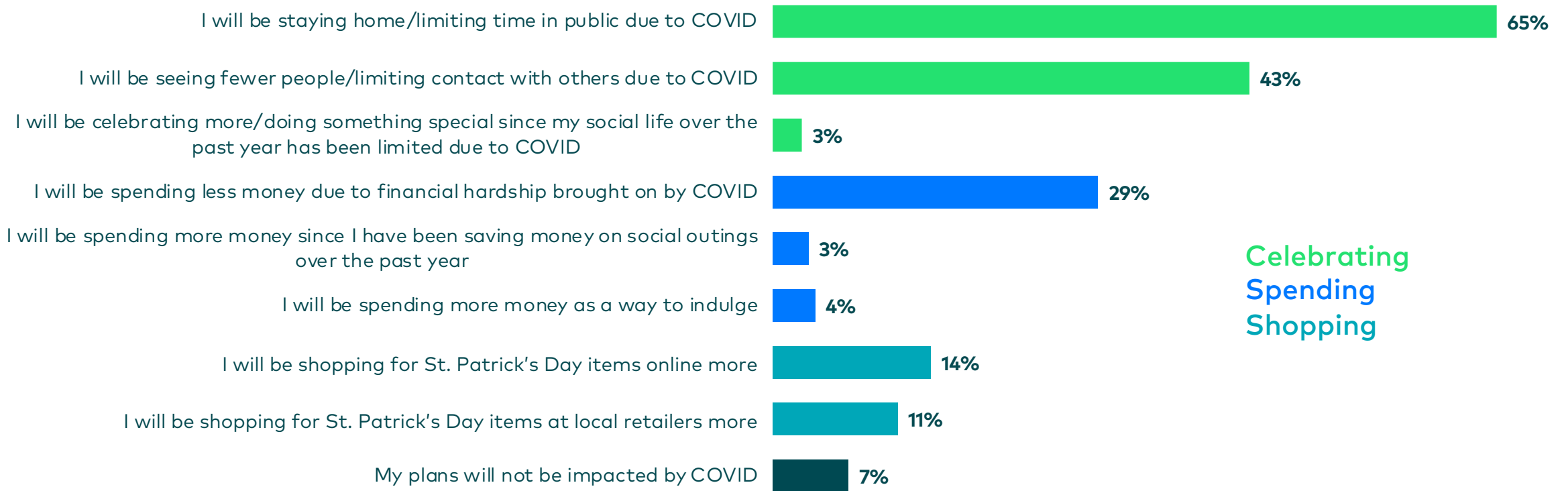
Numerator Canada 2021 Q1 Holiday Survey 02/02/2021 (n=1500) | St. Patrick's Day Celebrators (n=500)
Where will you do your St. Patrick's Day shopping this year? Select all that apply.

St. Patrick's Day heavily impacted by COVID-19 restrictions

Less than one-tenth of St. Patrick's Day celebrators expect their plans to be unchanged by COVID-19. Two-thirds say they'll spend the holiday at home, and two-fifths will see fewer people and limit contact with others.

St. Patrick's Day COVID Impact

% of Consumers who Celebrate St. Patrick's Day





Easter

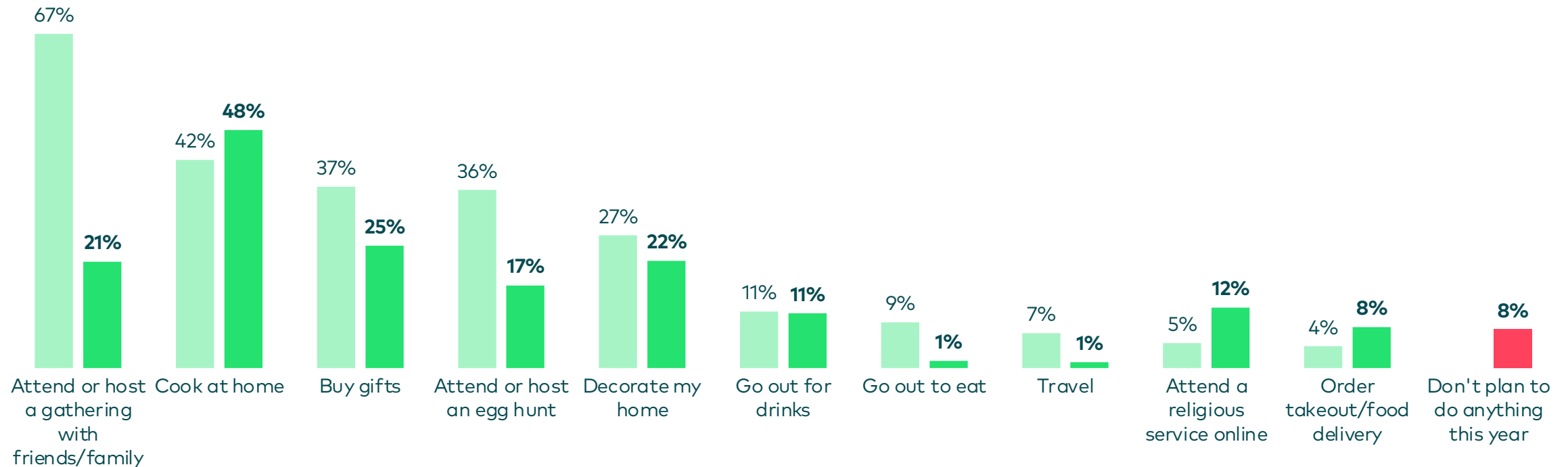
Consumers planning on fewer gatherings and gifts this Easter

While roughly two-thirds of consumers typically gather with friends and family for Easter, this year less than half will do so. Cooking at home will be the top option for celebrating this year.

Easter Celebration Plans

% of Consumers who Celebrate Easter

■ Previous Years ■ This Year (2021)



Numerator Canada 2021 Q1 Holiday Survey 02/02/2021 (n=1500) | Easter Celebrators (n=500)

How have you celebrated Easter in the past few years? / How do you plan to celebrate this year? Select all that apply.

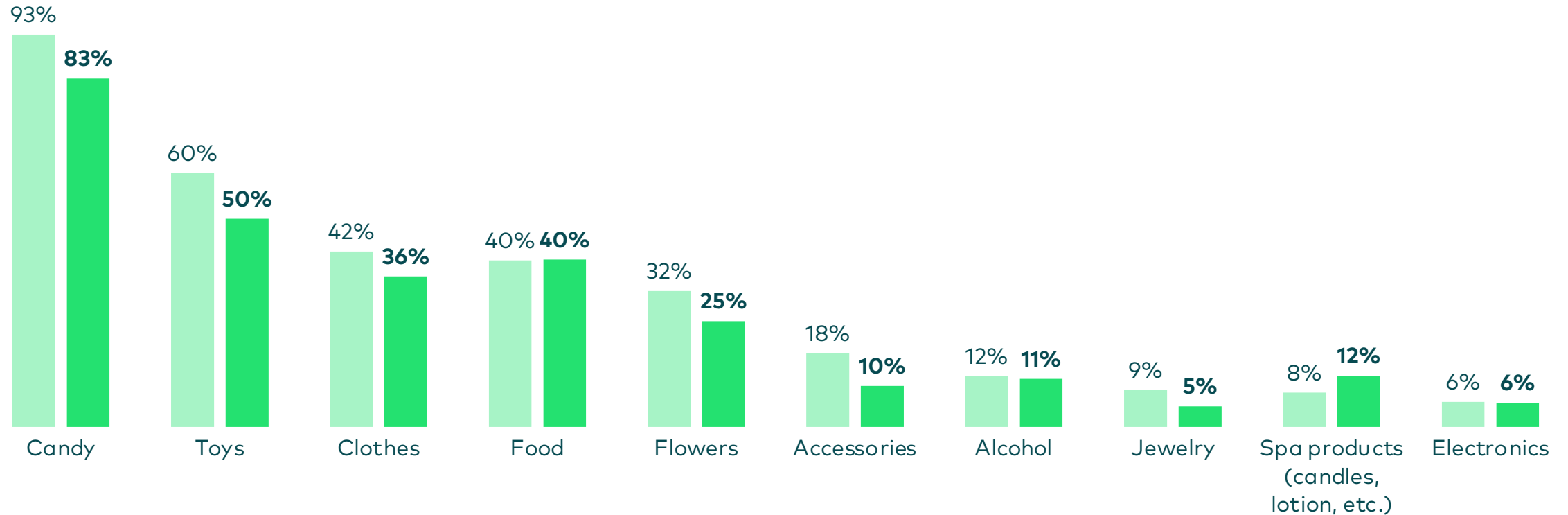
Most Easter gift-givers will purchase candy

Similar to prior years, this year's Easter baskets will be filled with candy and food. Spa products may see a slight boost this year, and although toys could see a slight dip, they still remain the second most popular gift choice.

Easter Gift Plans

% of Easter Gift Buyers

■ Previous Years ■ This Year (2021)



Numerator Canada 2021 Q1 Holiday Survey 02/02/2021 (n=1500) | Easter Celebrators (n=500)

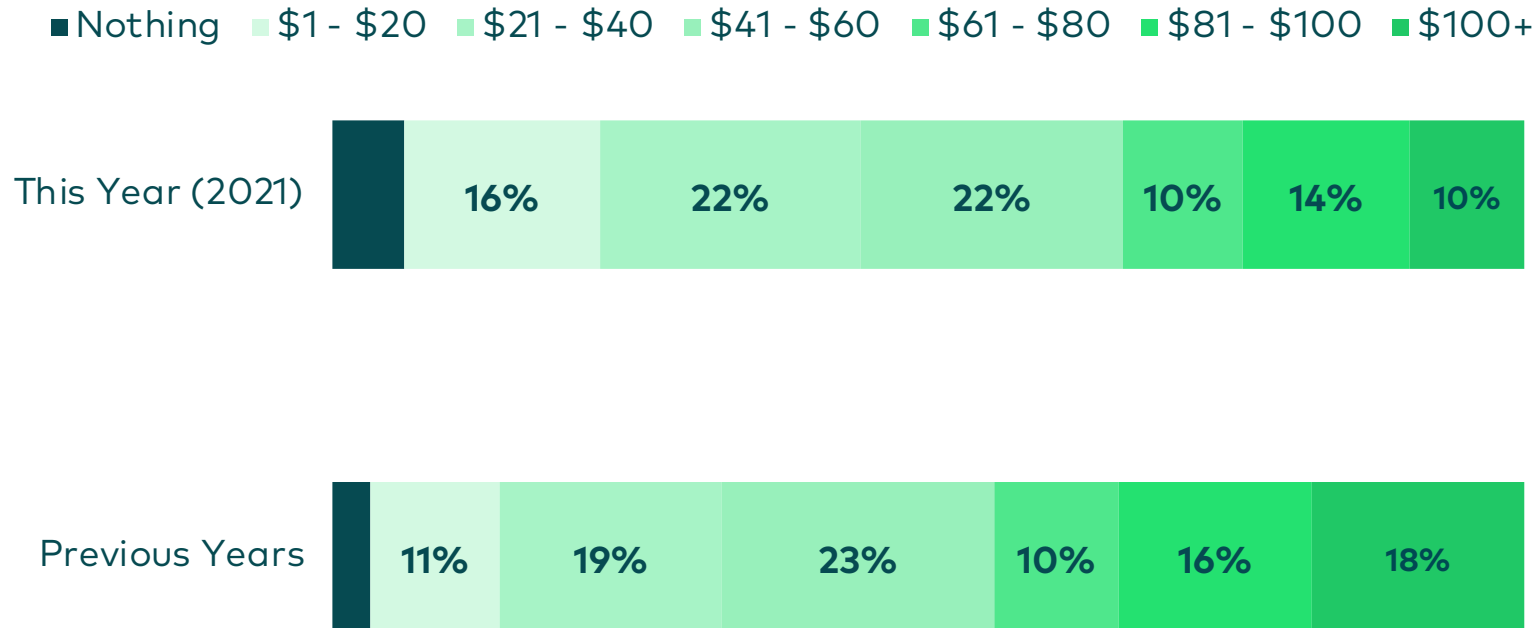
What kinds of gifts have you purchased for Easter in the past few years? / Which do you plan to buy this year? Select all that apply.

Consumers expect to spend less on food & drinks this Easter

Despite the anticipated per-household decrease in spend, driven by more intimate gatherings, the increase in overall gatherings may outweigh the decrease in gathering size, as we saw at Thanksgiving and Christmas.

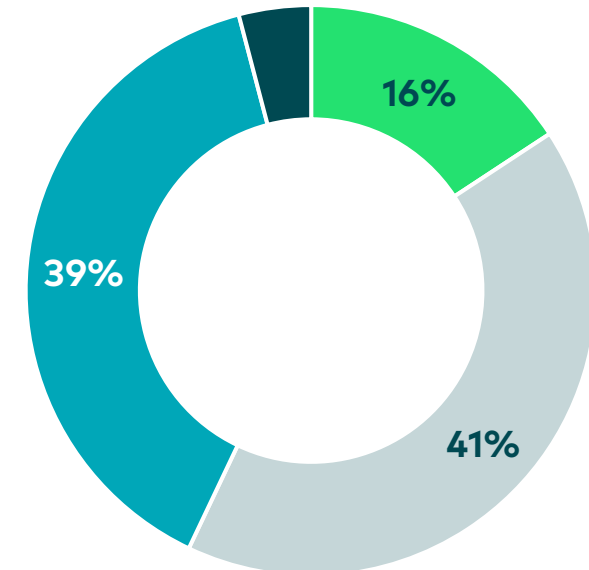
Easter Spending on Food, Drinks & Decorations

% of Consumers who Celebrate Easter



2021 Spend vs. Previous

■ Spending More ■ Spending Same ■ Spending Less ■ Not Buying



Numerator Canada 2021 Q1 Holiday Survey 02/02/2021 (n=1500) | Easter Celebrators (n=500)

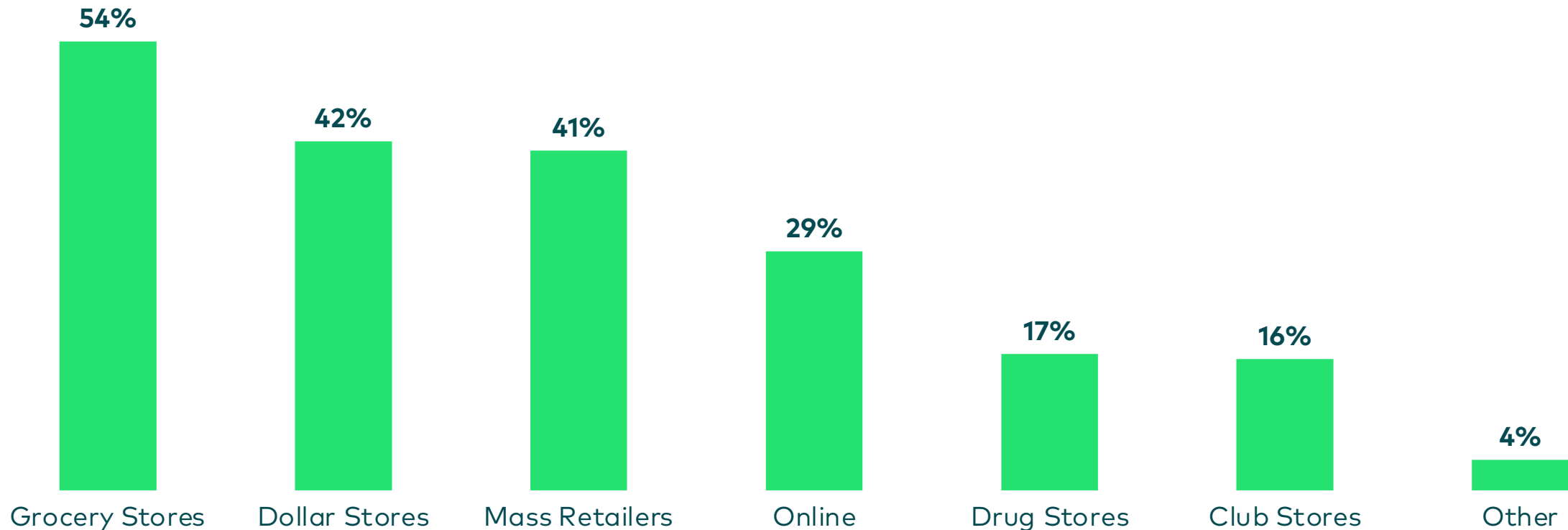
How much do you typically spend on food/drinks/decorations for Easter (in total)? / How much do you plan to spend this year?

Half plan to purchase Easter goods at grocery stores

Grocery and dollar stores will be top destinations for Easter purchases. Stores who can cater to the variety of needs– from food & drinks to decorations & gifts– will be best suited to capture Easter spending.

Easter Retail Channels

% of Consumers who Celebrate Easter



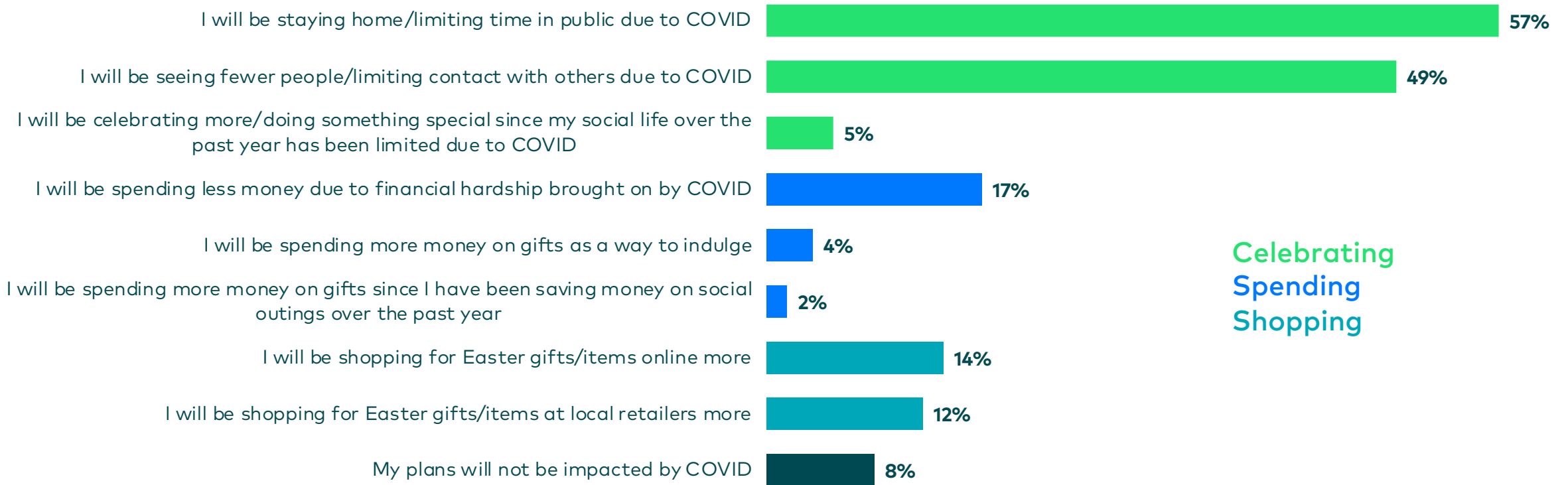
Numerator Canada 2021 Q1 Holiday Survey 02/02/2021 (n=1500) | Easter Celebrators (n=500)
Where will you do your Easter Shopping this year?

9 in 10 consumers expect COVID-19 impacts this Easter

Still a few months out, most consumers expect to spend their Easters at home with limited contact with others. Some are also planning to shift their spend online or to local retailers this year.

Easter COVID Impact

% of Consumers who Celebrate Easter





Want to learn more?

hello@numerator.com

