



2021 CANADA PREVIEW REPORT

UPCOMING SHOPPING HOLIDAYS

Black Friday / Cyber Weekend • Boxing Day



NUMERATOR CANADA
SHOPPING HOLIDAY
PREVIEW

WHAT'S INCLUDED?

Numerator Canada's 2021 Shopping Holiday Preview Report surveys how consumers are thinking about this holiday season's major sales events. It leverages a custom survey of ~1,000 individuals who typically participate in either Black Friday / Cyber Weekend or Boxing Day shopping.

SECTIONS:

Black Friday & Cyber Weekend

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Boxing Day

[Page 11](#)

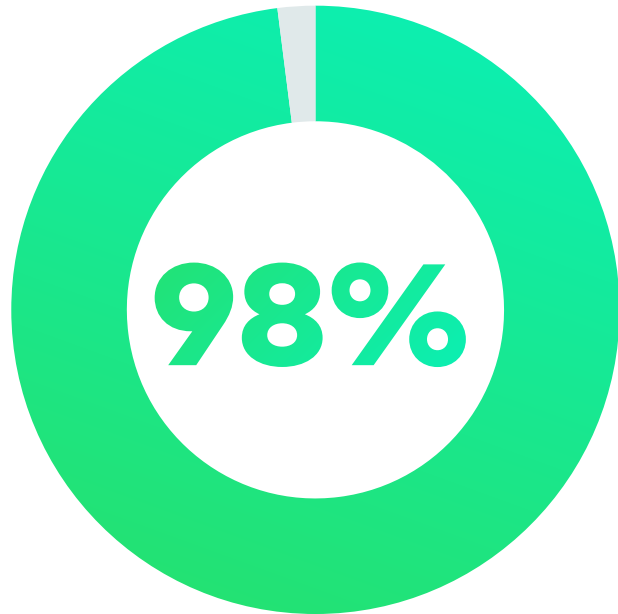
33%

OF CANADIAN HOUSEHOLDS
TYPICALLY PARTICIPATE IN
BLACK FRIDAY OR CYBER
WEEKEND SHOPPING



BLACK FRIDAY & CYBER WEEKEND OVERVIEW

Almost all typical Black Friday / Cyber Weekend shoppers will be partaking this year. However, 3 in 4 expect to have some sort of COVID-19 related impact on their shopping plans.

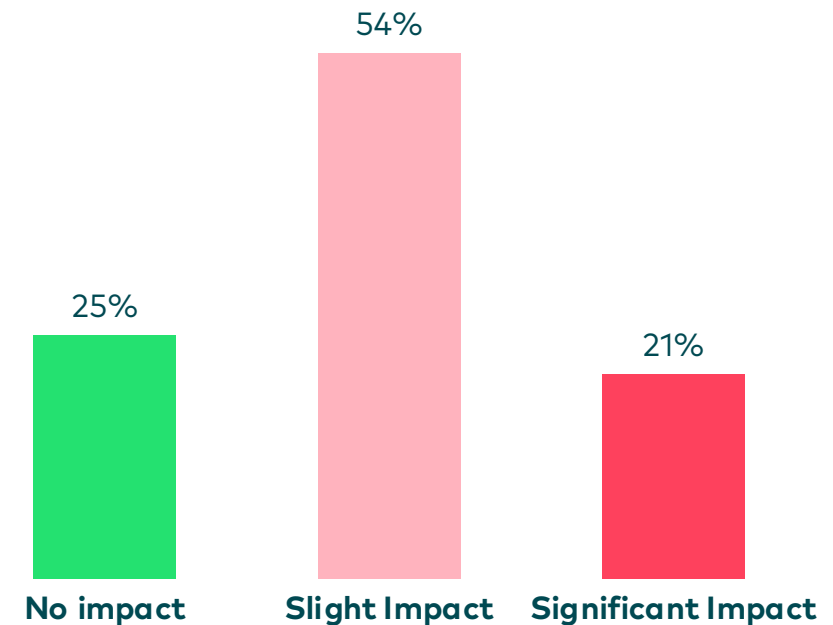


of usual Black Friday / Cyber Weekend shoppers are planning on participating this year

Expected COVID-19 Impact

% of Black Friday / Cyber Weekend Shoppers

■ No impact ■ Slight Impact ■ Significant Impact

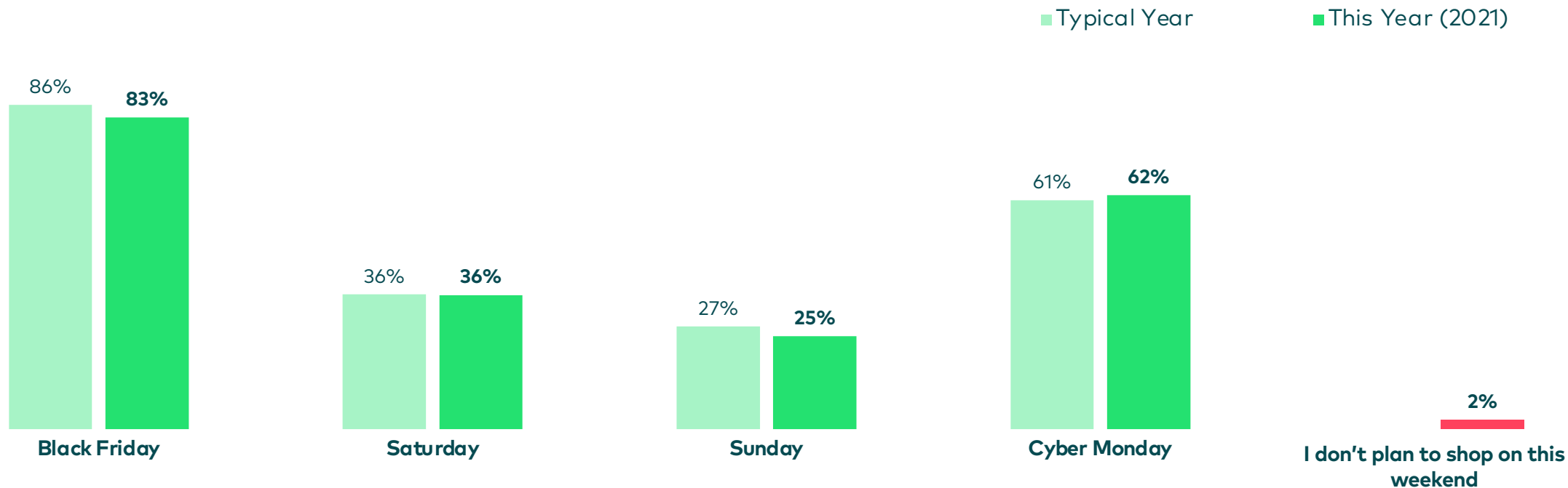


WHEN WILL CONSUMERS SHOP ON BLACK FRIDAY & CYBER WEEKEND?

Of the 1 in 3 consumers who typically shop on Black Friday / Cyber Weekend, over 4 in 5 still expect to shop on Black Friday itself, down 3% from previous years. Cyber Monday claims some of those shoppers, marginally growing from past years.

Shopping by Day

*Of the 33% who typically participate in Black Friday / Cyber Weekend shopping...



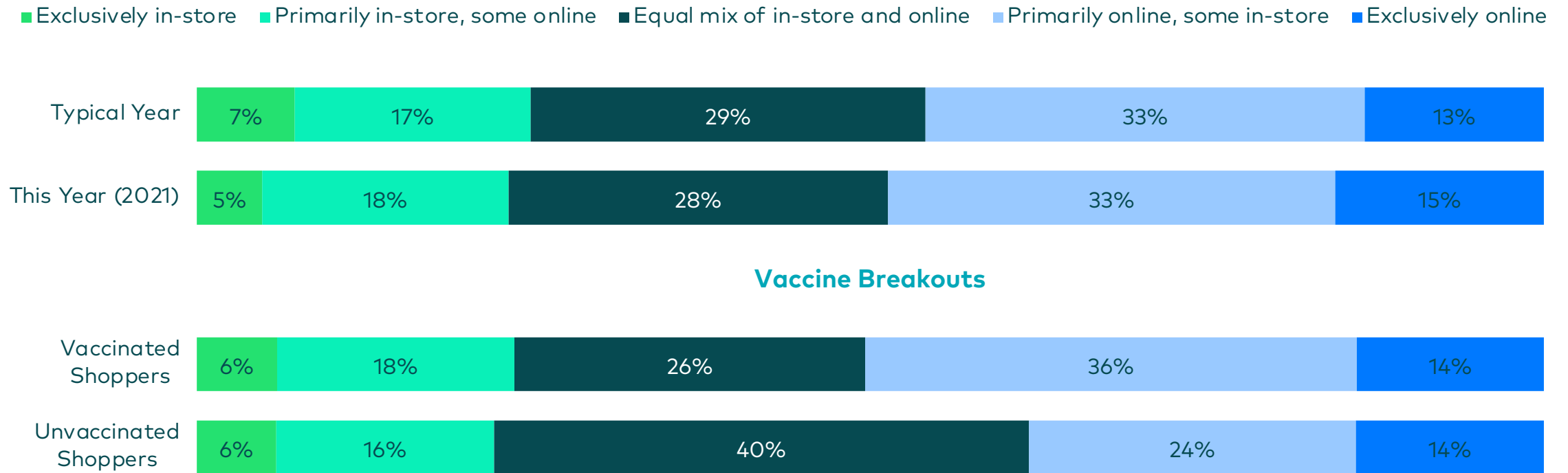
Numerator Canada 2021 Q4 Holiday Survey 09/27/2021 | Black Friday / Cyber Weekend Participants (n=549)
Which days do you typically shop for special sales/deals the weekend of Black Friday / Cyber Monday?
This year, which days do you plan to shop for special sales/deals the weekend of Black Friday / Cyber Monday?

HOW WILL CONSUMERS SHOP ON BLACK FRIDAY & CYBER WEEKEND?

Nearly half of consumers plan to do all or most of their Black Friday / Cyber Weekend shopping online, up slightly from prior years. This is higher among vaccinated shoppers, while those unvaccinated shoppers are more likely to have an equal mix.

In-Store vs. Online Shopping

% of Black Friday / Cyber Weekend Shoppers



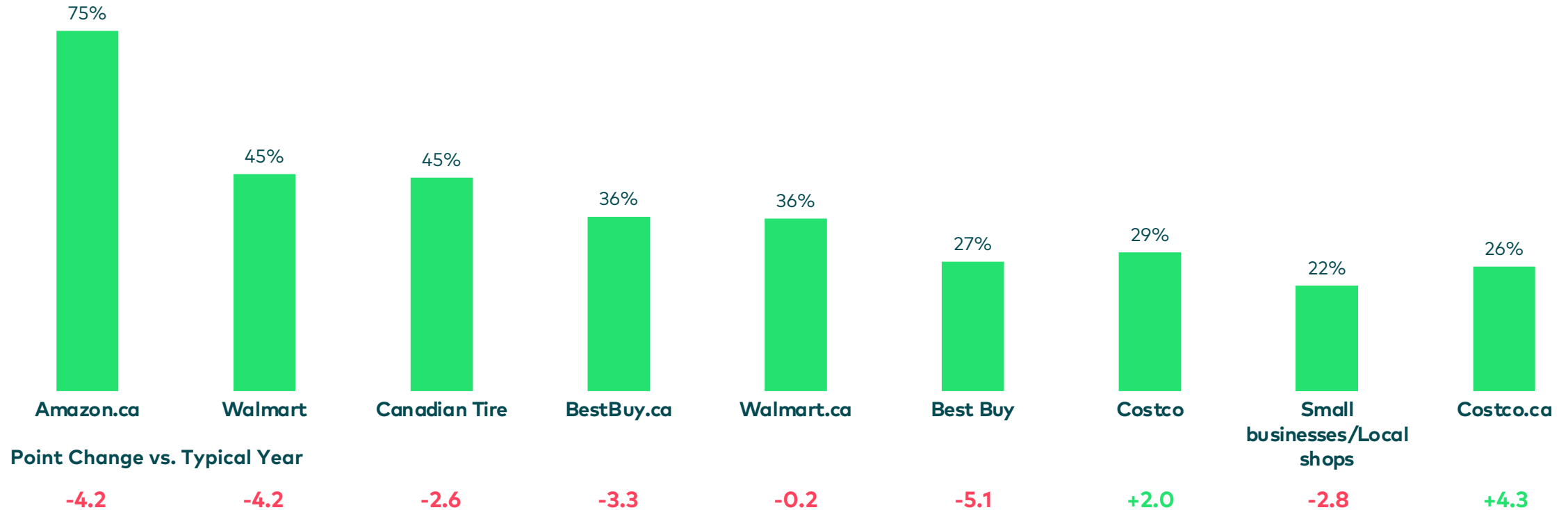
Numerator Canada 2021 Q4 Holiday Survey 09/27/2021 | Black Friday / Cyber Weekend Participants (n=549)
 Where do you typically shop for special sales/deals the weekend of Black Friday / Cyber Monday?
 This year, where do you plan to shop for special sales/deals the weekend of Black Friday/Cyber Monday?

WHERE WILL CONSUMERS BE SHOPPING ON BLACK FRIDAY & CYBER WEEKEND?

As shifts continue to move towards online shopping, 3 in 4 expect to purchase from Amazon, despite decline from previous years. Costco has seen gains both in-store and online.

Black Friday / Cyber Weekend Purchase Locations

% of Black Friday / Cyber Weekend Shoppers



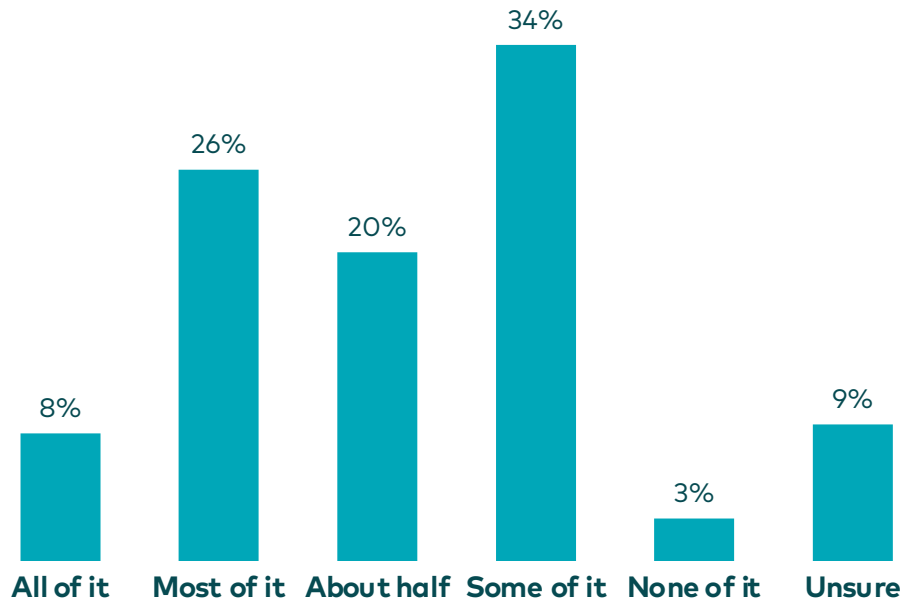
Numerator Canada 2021 Q4 Holiday Survey 09/27/2021 | Black Friday / Cyber Weekend Participants (n=549)
 This year, which of the following retailers do you plan to shop at on the weekend of Black Friday / Cyber Monday?

HOW MUCH HOLIDAY SHOPPING WILL BE DONE ON BLACK FRIDAY & CYBER WEEKEND?

A third of shoppers expect to complete all or most of their holiday shopping the weekend of Black Friday / Cyber Weekend. 1 in 5 expect to spend more this year than they have in years past, while almost 2 in 3 expect to spend about the same.

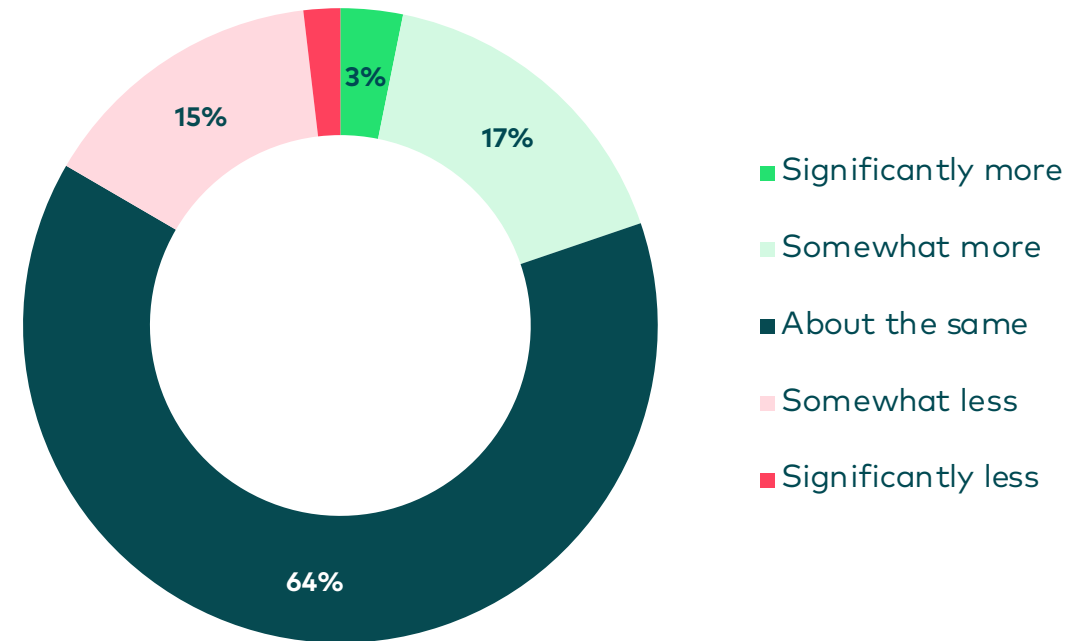
Holiday Shopping Completion on Cyber Weekend

% of Black Friday / Cyber Weekend Shoppers



2021 Spending vs. Typical Year

% of Black Friday / Cyber Weekend Shoppers



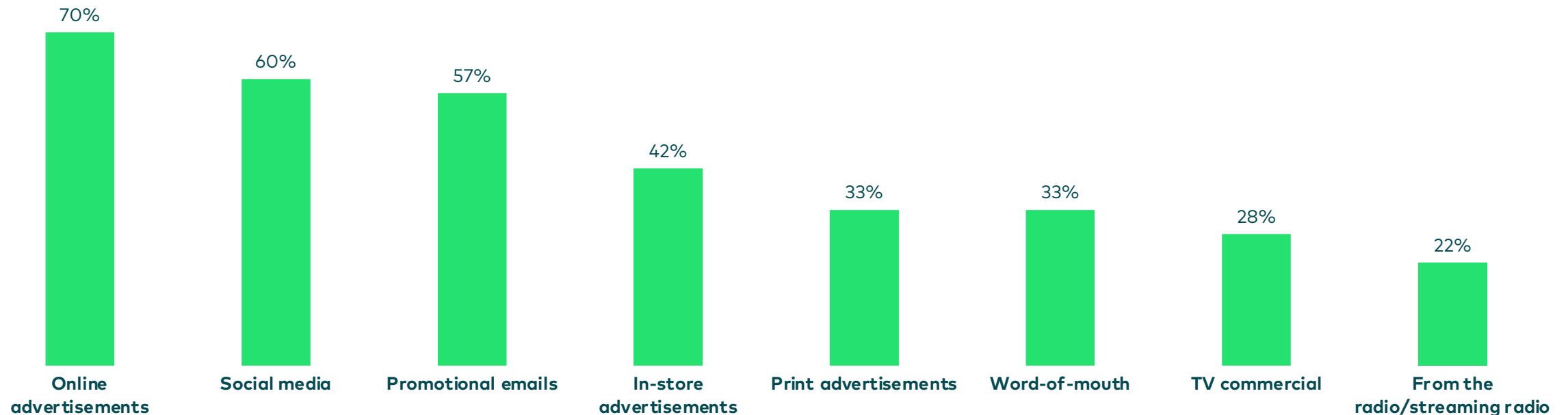
Numerator Canada 2021 Q4 Holiday Survey 09/27/2021 | Black Friday / Cyber Weekend Participants (n=549)
 How much of your holiday shopping do you plan to complete on the weekend of Black Friday / Cyber Monday?
 How much do you expect to spend in total this year on Black Friday / Cyber Monday weekend compared to a typical year?

HOW DO SHOPPERS HEAR ABOUT BLACK FRIDAY & CYBER WEEKEND DEALS?

The majority of Cyber Weekend shoppers hear about the weekend's deals and sales digitally – through online advertisements, social media, or promotional emails. About 1 in 3 say they look at print advertisements to see what will be on sale.

Deal Awareness Method

% of Black Friday / Cyber Weekend Shoppers

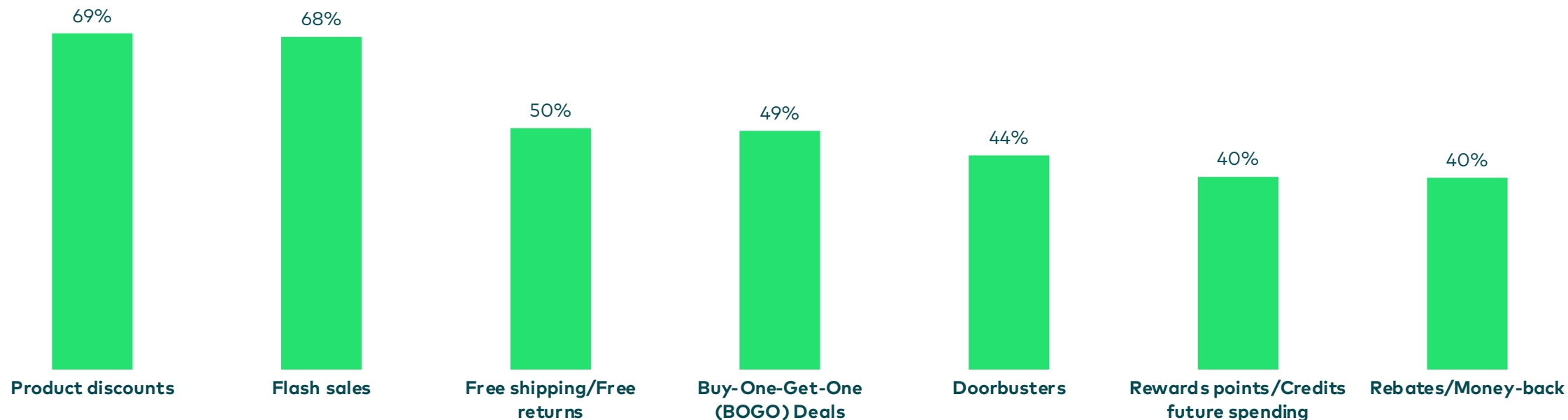


WHAT TYPES OF DEALS DO SHOPPERS WANT MOST?

Almost 7 in 10 Black Friday / Cyber Weekend shoppers are most interested in straightforward product discounts, followed closely by flash sales. Half of consumers look for free shipping & free returns and BOGO offerings as well.

Deal Preferences

% of Black Friday / Cyber Weekend Shoppers



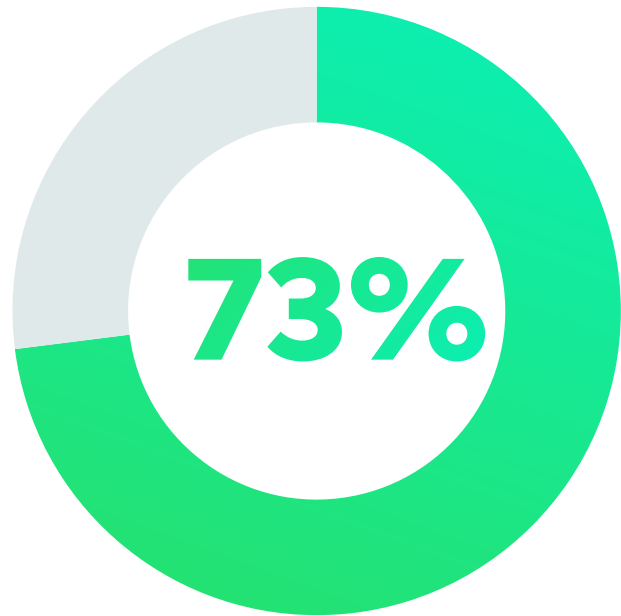
44%

OF CANADIAN HOUSEHOLDS
TYPICALLY PARTICIPATE IN
BOXING DAY SHOPPING



BOXING DAY OVERVIEW

Roughly 3 in 4 shoppers who typically participate in Boxing Day sales plan to participate this year as well. Shopping could look different, though, as 4 in 5 expect COVID-19 to impact their shopping plans.

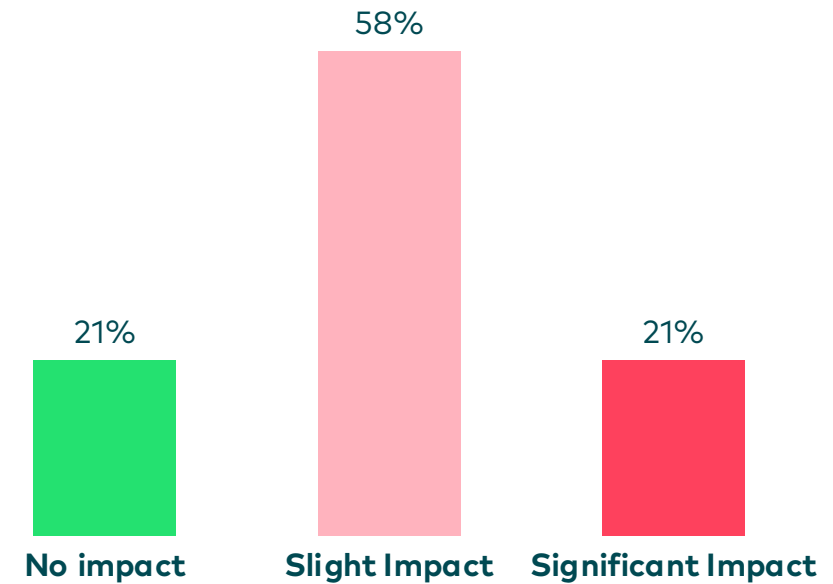


of usual Boxing Day shoppers are planning on participating this year

Expected COVID-19 Impact

% of Boxing Day Shoppers

■ No impact ■ Slight Impact ■ Significant Impact



Numerator Canada 2021 Q4 Holiday Survey 09/27/2021 | Boxing Day Participants (n=553)

This year, do you plan to shop on Boxing Day?

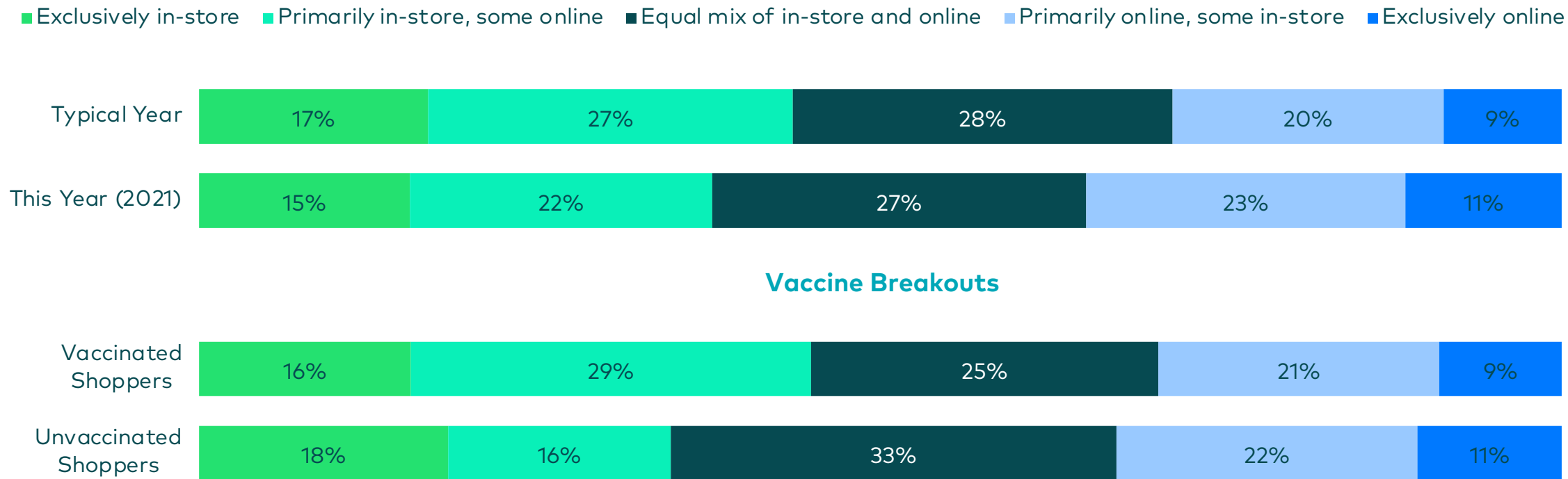
To what extent do you expect COVID-19 restrictions or limitations to impact your Boxing Day shopping this year?

HOW WILL CONSUMERS SHOP ON BOXING DAY?

1 in 3 consumers plan to do all or most of their Boxing Day shopping online, up 5 percentage points from years prior. Vaccinated shoppers are more likely to be decisive with their shopping locale, with only a quarter expecting an equal mix in-store & online, as opposed to a third of Unvaccinated shoppers.

In-Store vs. Online Shopping

% of Boxing Day Shoppers



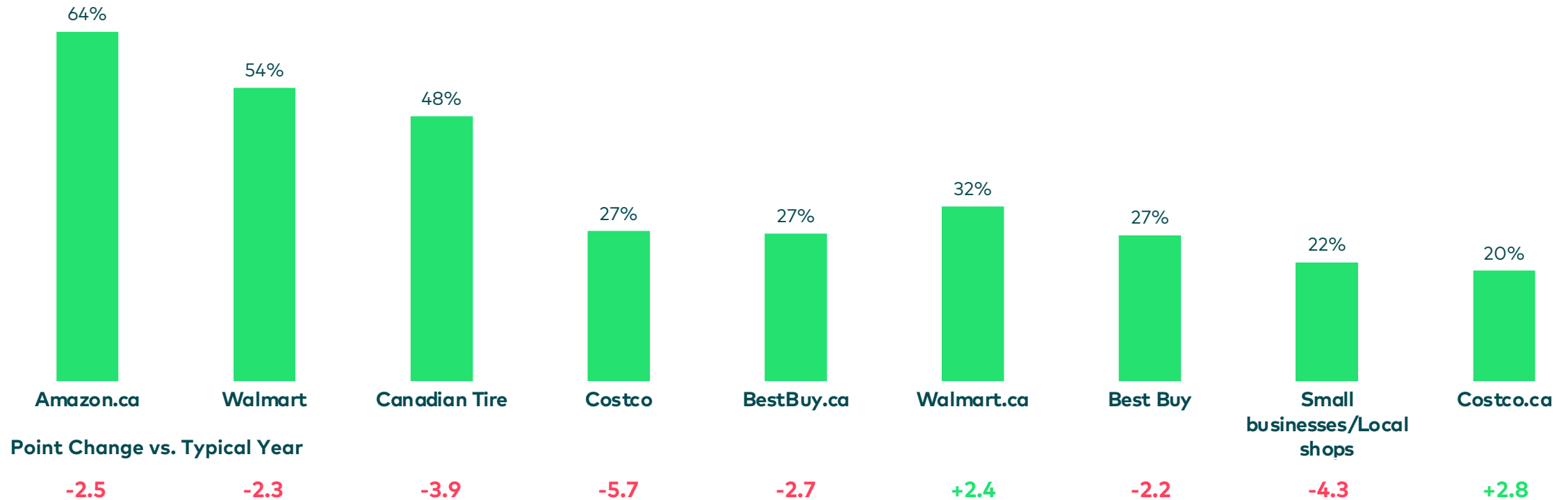
Numerator Canada 2021 Q4 Holiday Survey 09/27/2021 | Boxing Day Participants (n=553)
Where do you typically shop for special sales/deals the weekend of Boxing Day?
This year, where do you plan to shop for special sales/deals the weekend of Boxing Day?

WHERE WILL CONSUMERS BE SHOPPING ON BOXING DAY?

As shifts continue to move towards online shopping, gains are seen for both Walmart.ca and Costco.ca. Amazon, despite seeing decline from previous years, still expects to have almost 2 in 3 shoppers spend with them this Boxing Day.

Boxing Day Purchase Locations

% of Boxing Day Shoppers



Numerator Canada 2021 Q4 Holiday Survey 09/27/2021 | Boxing Day Participants (n=553)
 Which of the following retailers do you typically shop at/plan to shop at on Boxing Day?

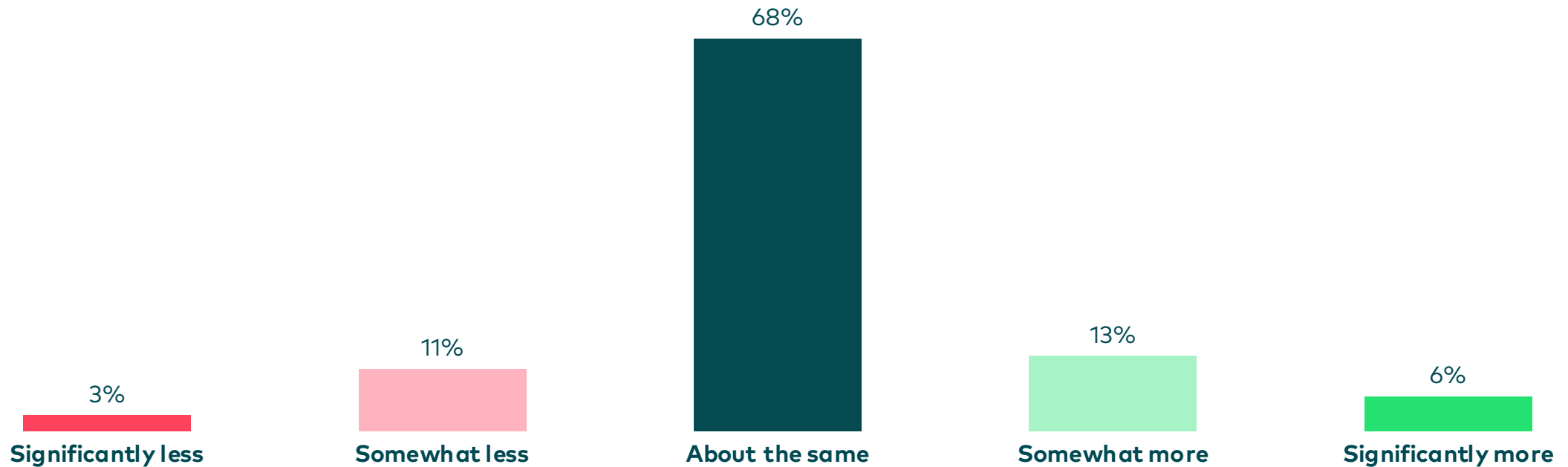
HOW MUCH WILL CONSUMERS SPEND ON BOXING DAY?

Spending will likely look the same this Boxing Day, as over 2 in 3 shoppers plan to spend about the same amount this Boxing Day. Almost 1 in 5 shoppers plan to spend more.

2021 Spending vs. Typical Year

% of Boxing Day Shoppers

■ Significantly less ■ Somewhat less ■ About the same ■ Somewhat more ■ Significantly more



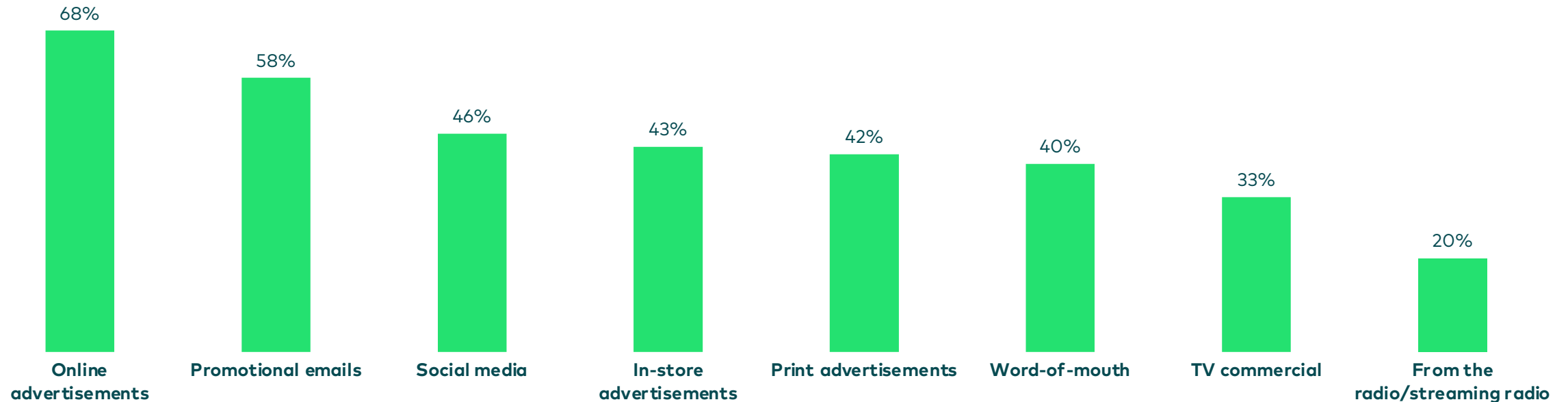
Numerator Canada 2021 Q4 Holiday Survey 09/27/2021 | Boxing Day Participants (n=553)
How much do you expect to spend in total this year on Boxing Day weekend compared to a typical year?

HOW DO SHOPPERS HEAR ABOUT BOXING DAY?

Over half of Boxing Day shoppers hear about the weekend's deals and sales through digital avenues such as online ads and promotional emails. 2 in 5 hear about deals through word-of-mouth and print advertising.

Deal Awareness Method

% of Boxing Day Shoppers



WHAT TYPES OF DEALS DO SHOPPERS WANT MOST?

When it comes to specific deals offered, over half of Boxing Day shoppers are looking for direct deals like product discounts and flash sales. BOGO deals also draw interest, with over 2 in 5 consumers planning to shop this offering.

Deal Preferences

% of Boxing Day Shoppers





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