



2021 Canada Holiday Consumer Intentions

# Upcoming Q3 Holidays

Labour Day • Thanksgiving

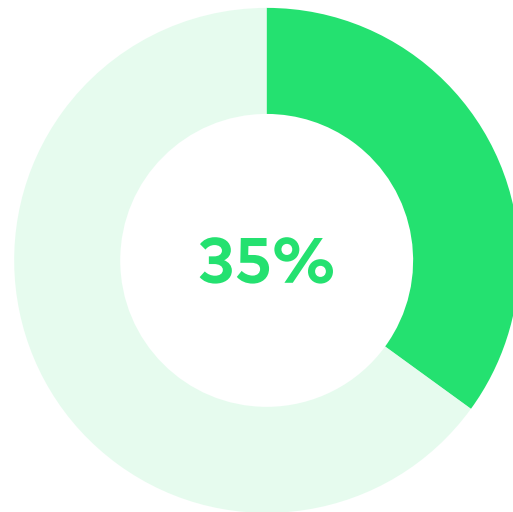


# Numerator Canada Holiday Intentions Study

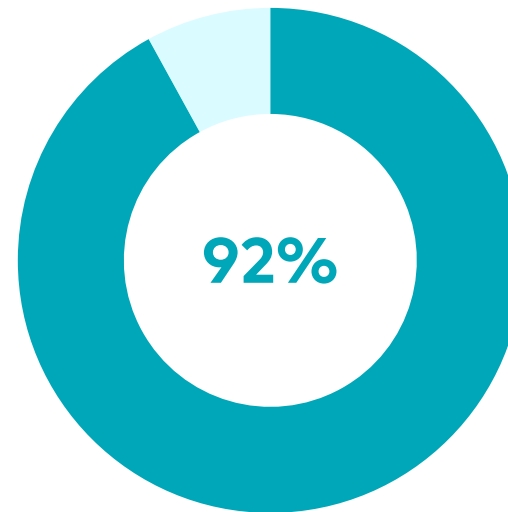
The Q3 Holiday Intentions survey was fielded to 1,238 Numerator OmniPanelists from 6/18/21 to 6/19/21 and covered Labour Day and Thanksgiving. All were asked which of these holidays they typically celebrated & were then asked more in-depth questions about 2021 celebration plans for one of their selected holidays.

% OF CONSUMERS WHO TYPICALLY CELEBRATE...

## Labour Day



## Thanksgiving

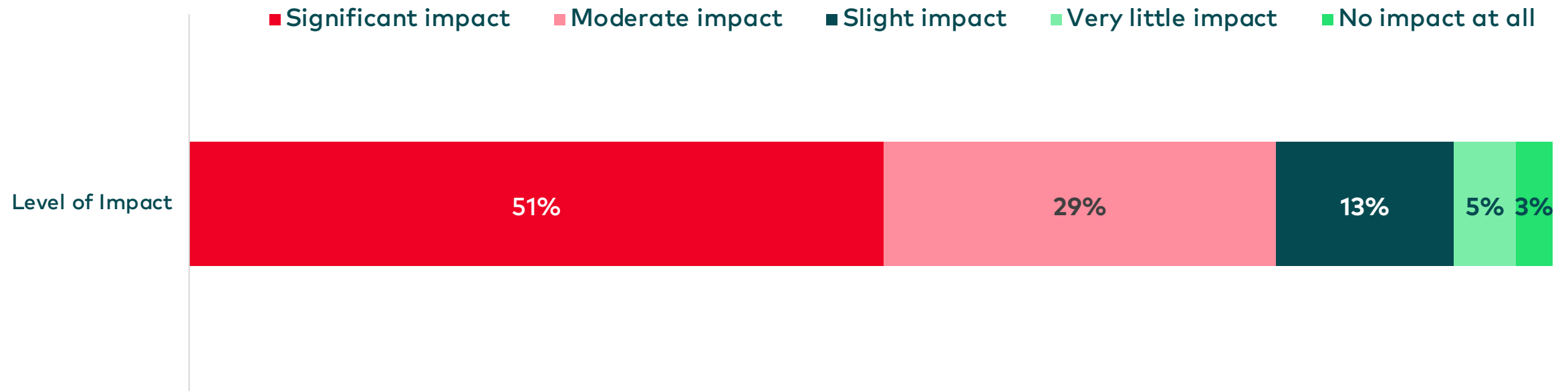


# COVID-19 restrictions have heavily limited Canadian holiday celebrations in the past year

Over 3 in 4 consumers have felt at least moderate, COVID-19 related impact on the past year of celebrations with half feeling as though it was significant.

## COVID-19 Impact on Past Year of Holidays

% of consumers

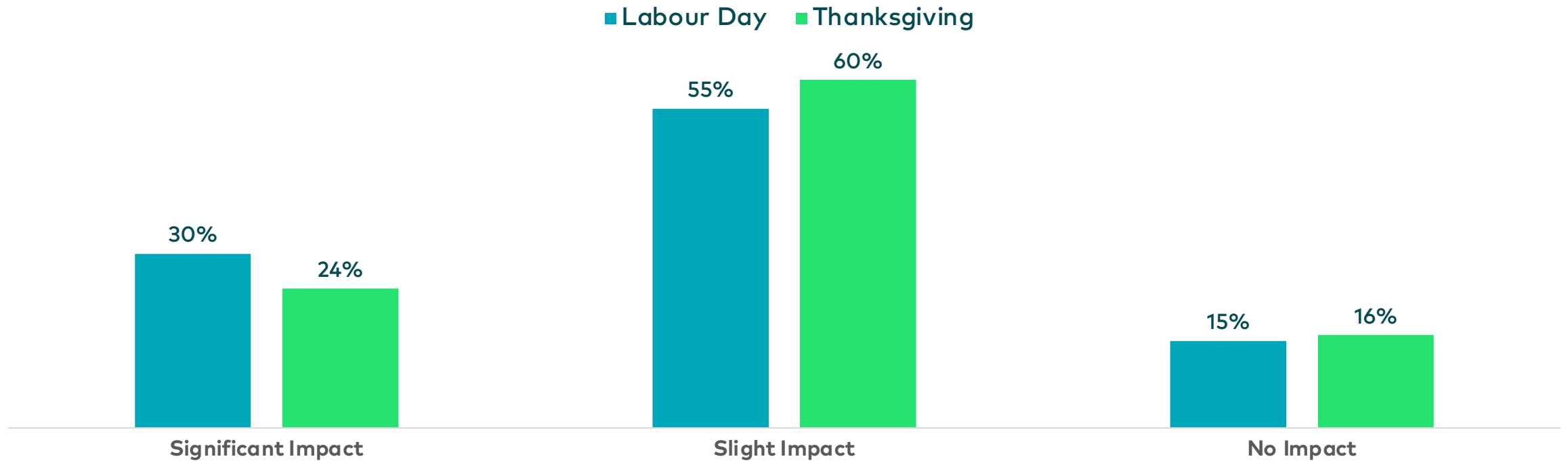


# Most consumers expect little-to-no COVID impacts on their upcoming holiday celebrations

Over half of consumers expect only a slight impact on the two upcoming holidays, with around 1 in 4 consumers expecting significant impact.

## Expected COVID Impact

% of consumers who celebrate each given holiday

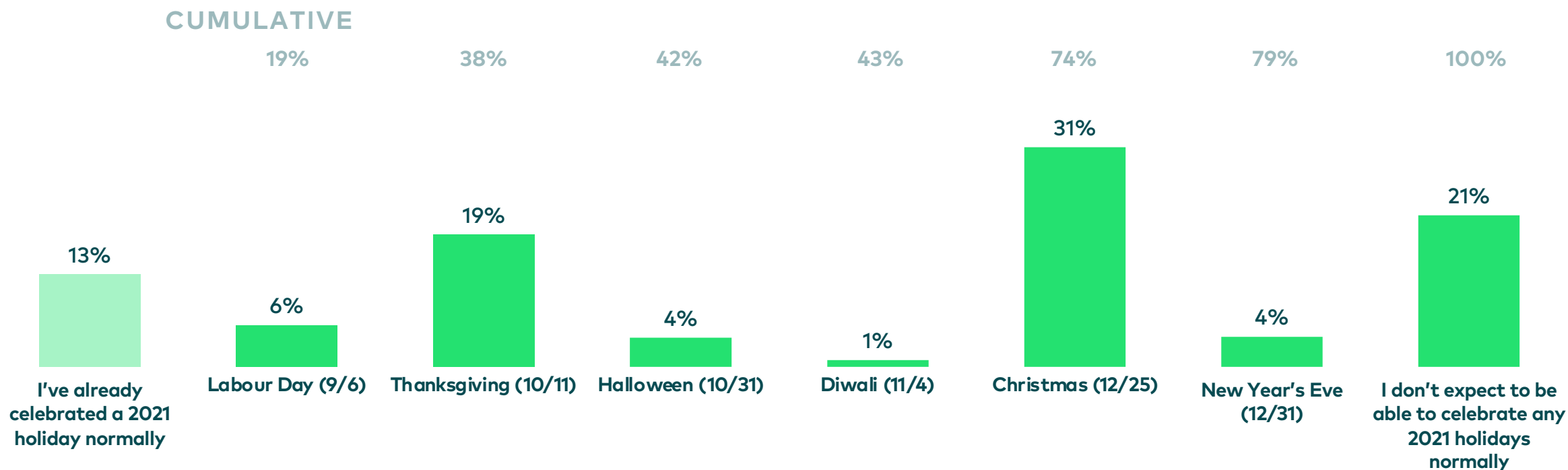


# Thanksgiving will be the first "normal" holiday for 1 in 5 consumers...

A third of Canadian consumers won't feel comfortable celebrating until Christmas and 20% don't expect to be able to celebrate until next year at the earliest.

## First "Normal" Holiday Expectation

% of consumers



Numerator Canada 2021 Q3 Holiday Survey 06/19/2021 (n=1,238)

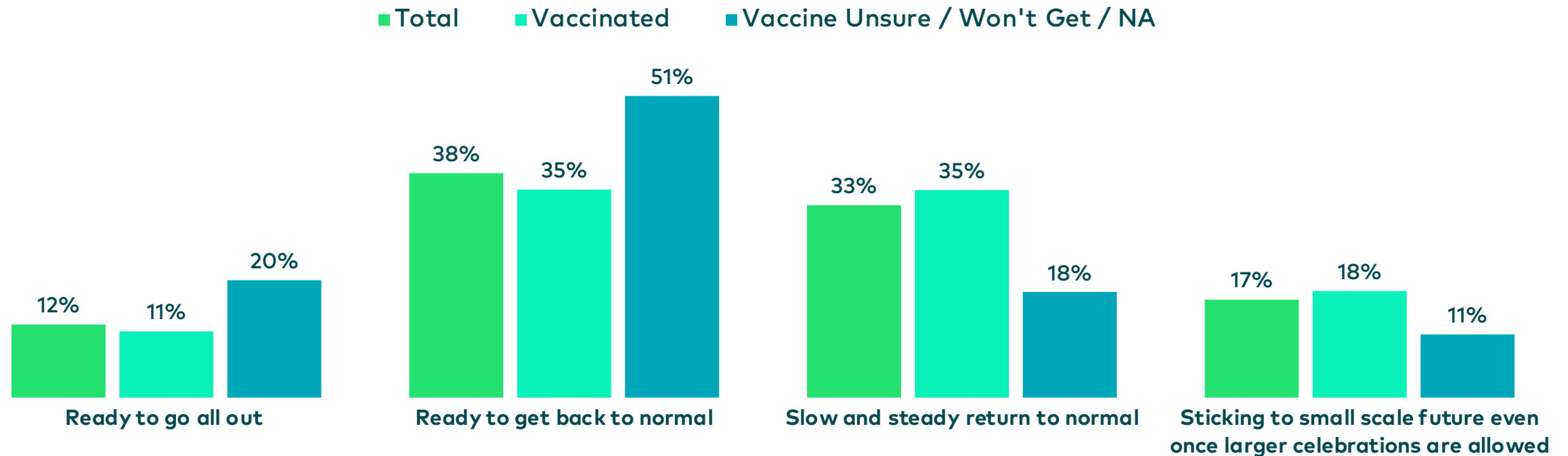
What is the first holiday you expect to be able to celebrate normally in 2021 (i.e., free of COVID-19 restrictions, able to celebrate however you'd like)?

# ...but "normal" might still feel different, with consumers being tentative to go all out

Half of Canadian consumers are expecting to either move slowly back to normal or stick to small scale celebrations for the foreseeable future.

## Post-COVID Holiday Approach

% of consumers by Vaccine Status

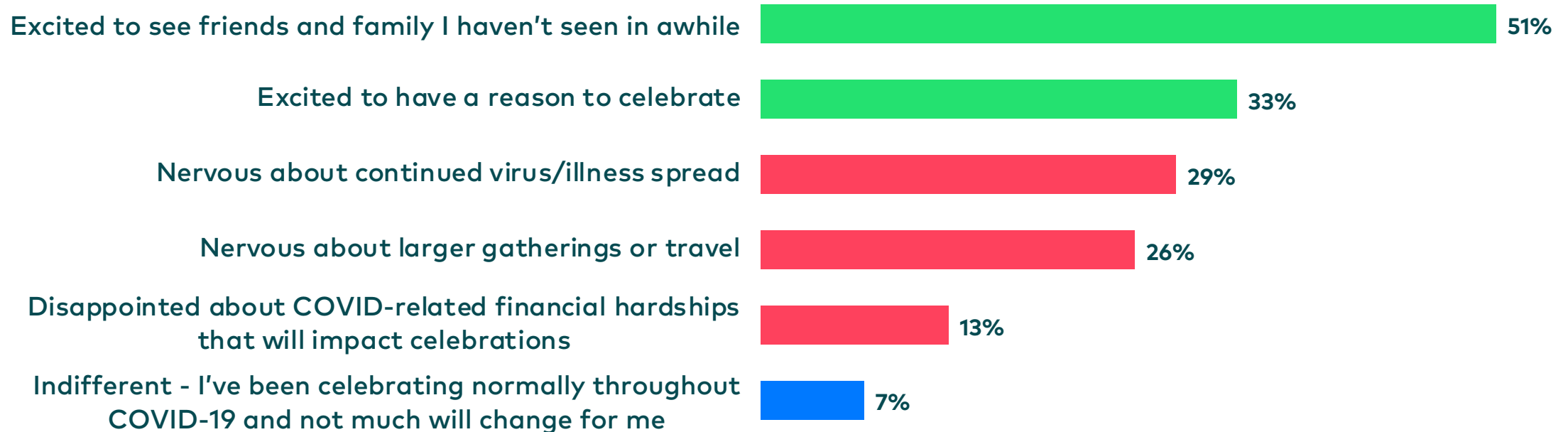


# Canadian excitement around a return to normal stems from reconnecting with friends and family

A majority of consumers are excited to see familiar faces after over a year apart and a third are just excited to have a reason to celebrate.

## Feelings on "Normal" Holiday Celebrations

% of consumers





# Labour Day

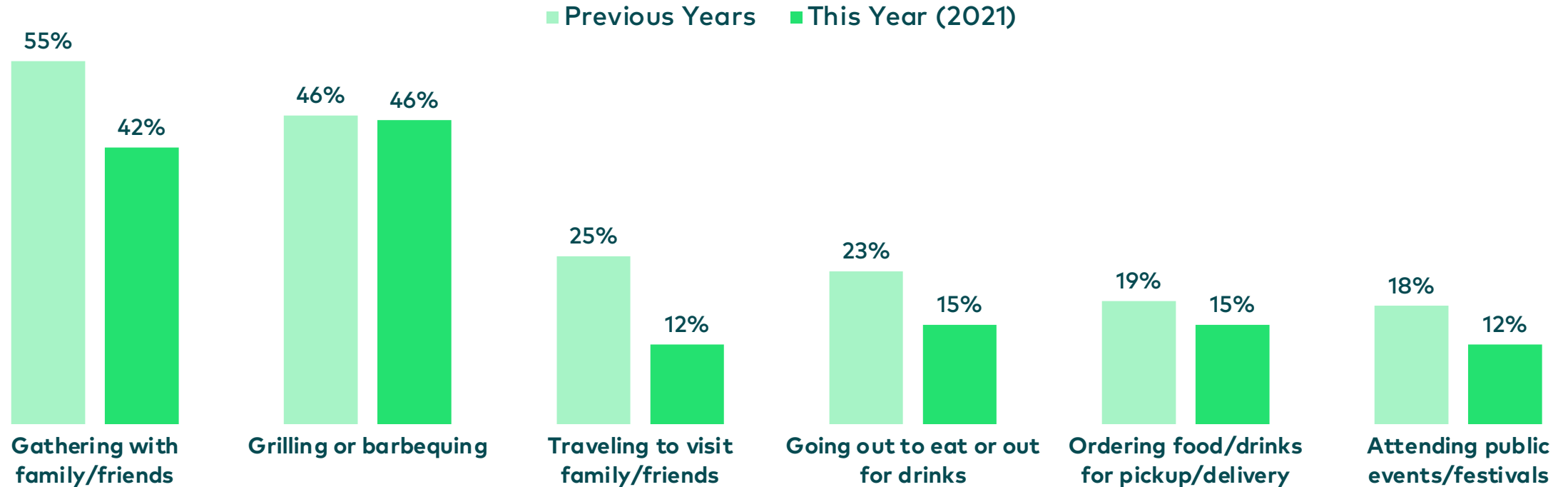


# Plans to gather this Labour Day have taken a hit

Less than half of typical Labour Day celebrators are planning to gather with family and friends, a 13% decline from past years. Traveling has seen similar decline.

## Labour Day Celebration Plans

% of Labor Day Celebrators

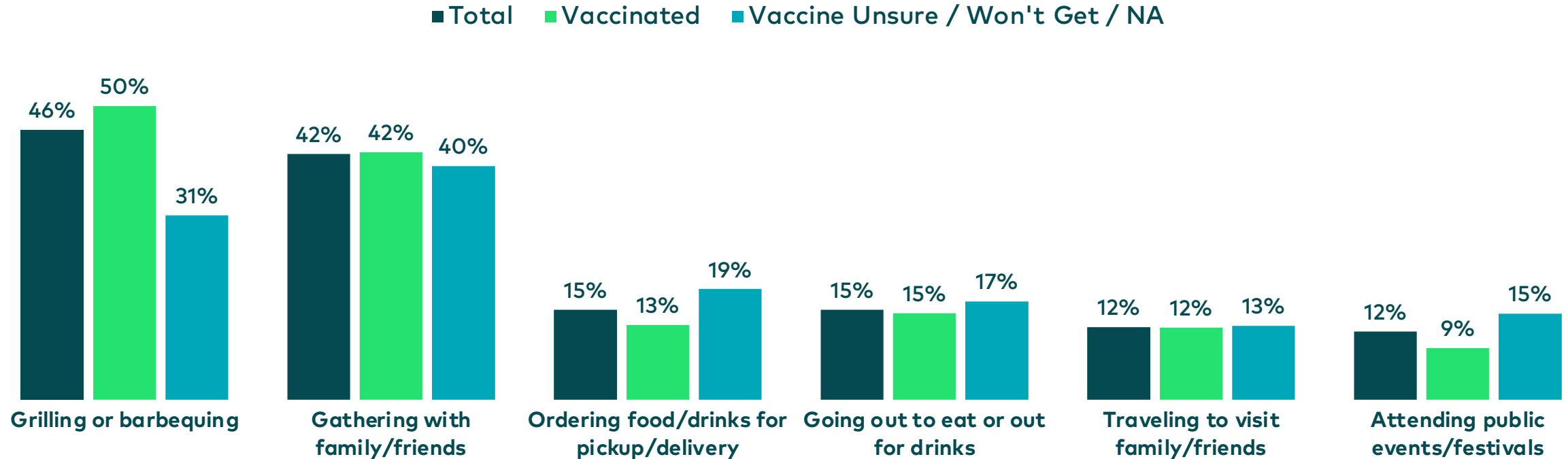


# Vaccine's Impact: Labour Day

Outside of grilling and attending public festivals, Labour Day celebration plans are consistent across vaccine groups, with vaccinated individuals less likely to partake in either activity.

## Labour Day Celebration Plans

% of celebrators by Vaccine Status

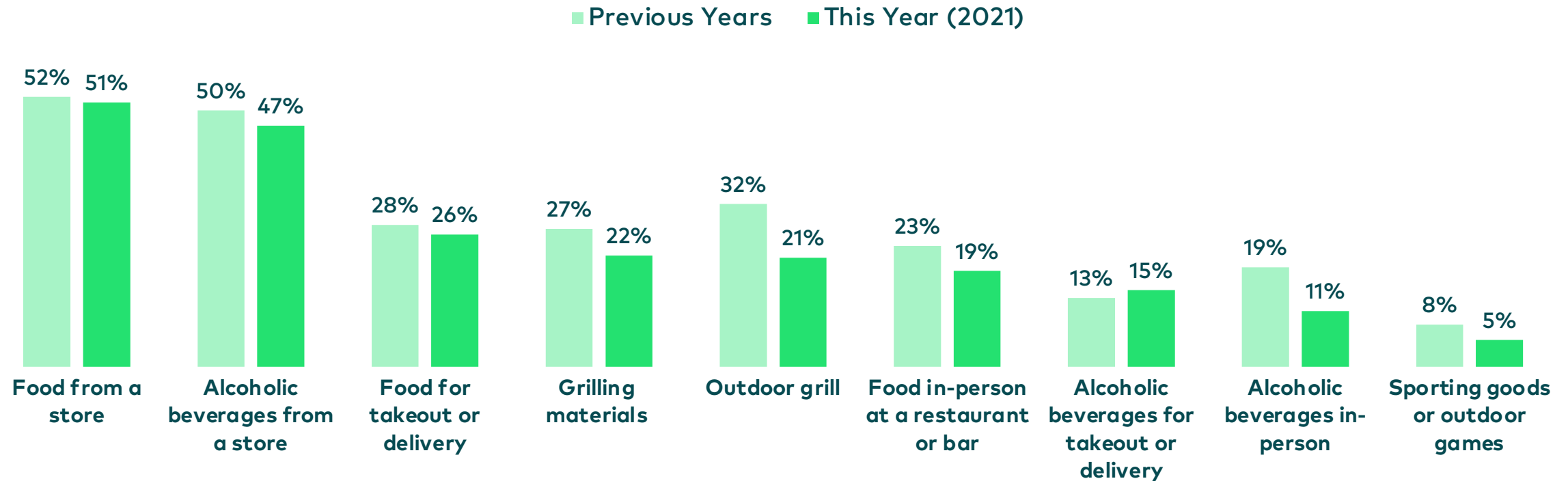


# Labour Day purchases will look similar to past celebrations

Despite declines across most categories, alcoholic beverages for takeout or delivery is the only item expected to see a rise in number of shoppers purchasing.

## Labour Day Purchases

% of Labour Day Celebrators

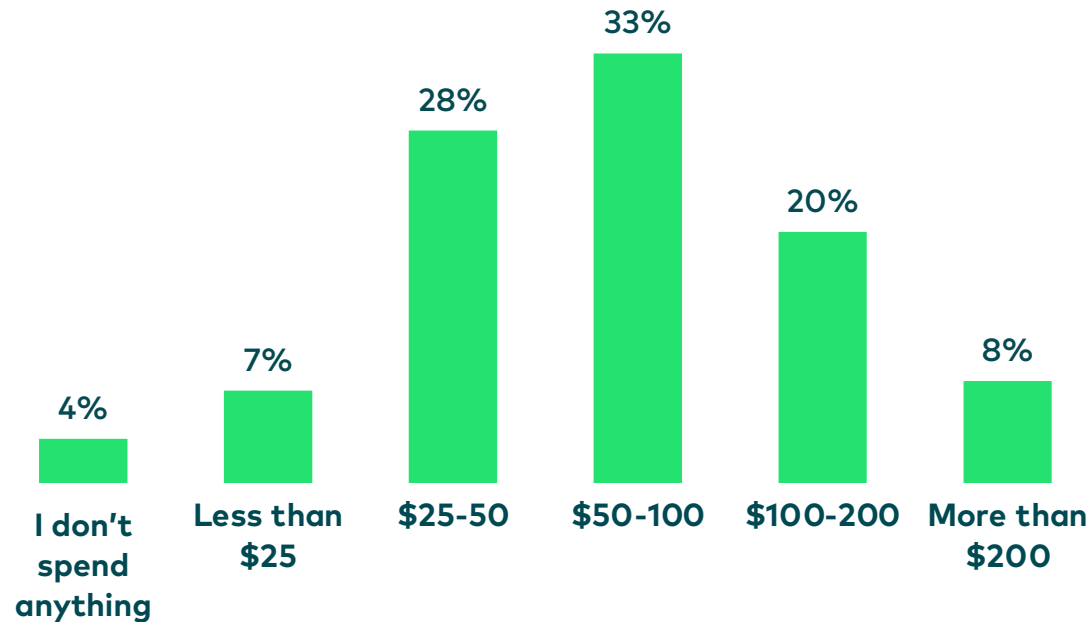


# Spending will be reminiscent of past Labour Day levels

While two-thirds of Labor Day shoppers expect to spend the same as they have in years past, one in five say they expect to spend more on this year's celebrations. A majority say they'll likely spend between \$25 and \$100.

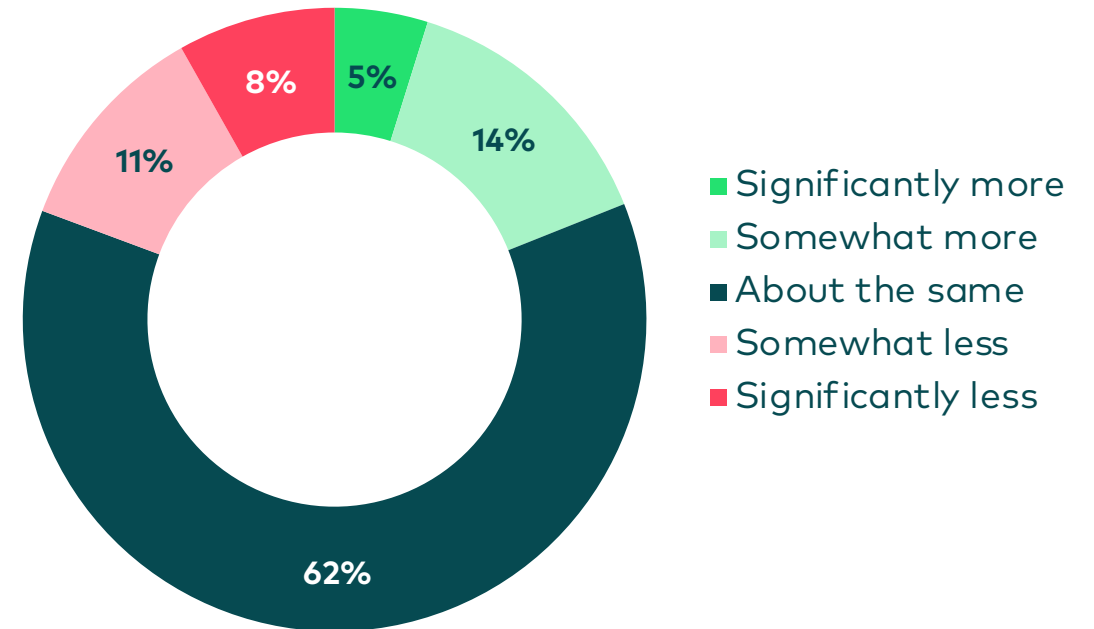
## Labour Day Spending

% of Labour Day Celebrators



## 2021 Expected Spend vs. Previous

% of Labour Day Celebrators





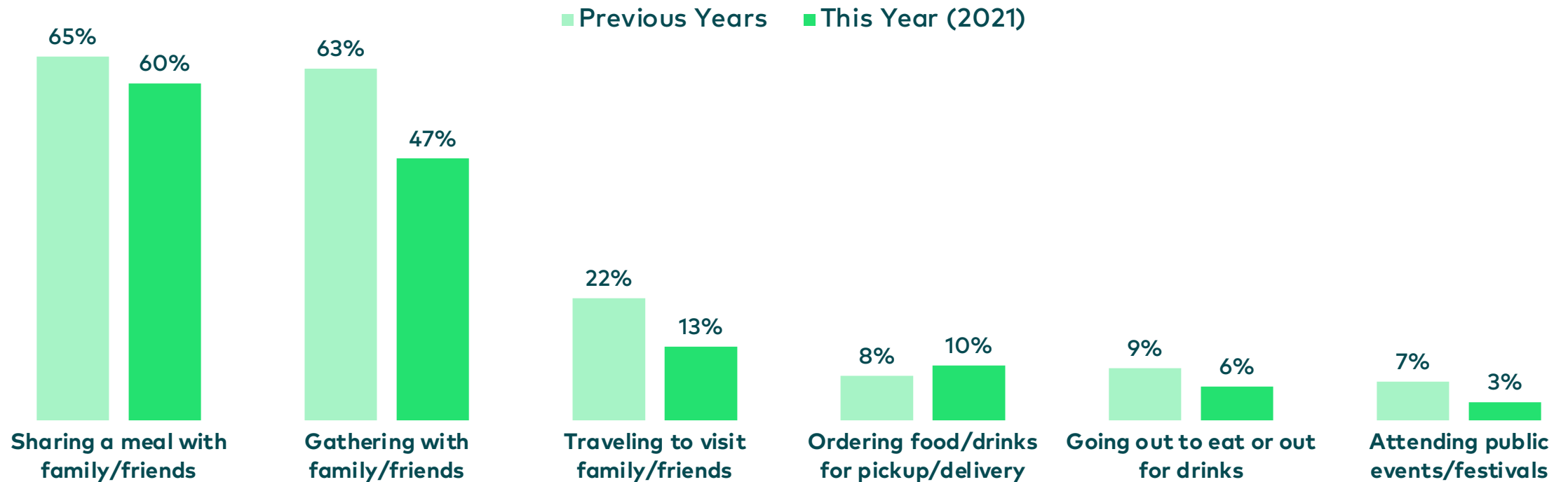
# Thanksgiving

# Thanksgiving plans to gather seeing steep decline

While most still plan to share a meal, 16% of consumers have shifted away from planning larger scale gatherings with friends and family compared to celebrations in years past.

## Thanksgiving Celebration Plans

% of Thanksgiving Celebrators

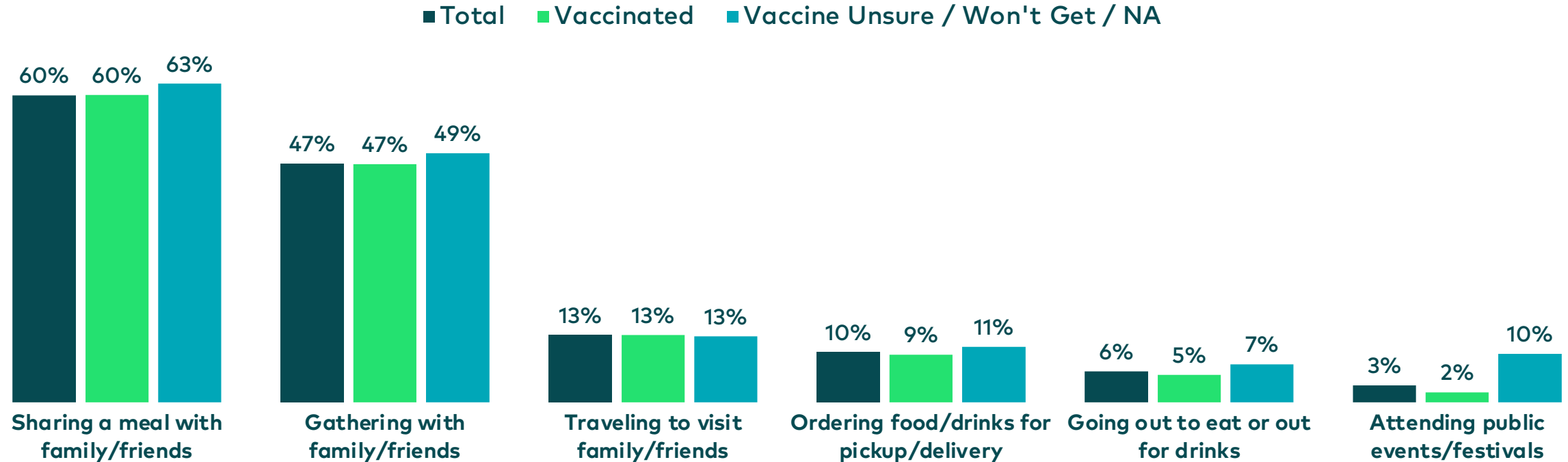


# Vaccine's Impact: Thanksgiving

Expect consumer celebrations to look similar across vaccine status, with unvaccinated individuals being more 5x likely to attend public events than vaccinated individuals.

## Thanksgiving Celebration Plans

% of celebrators by Vaccine Status

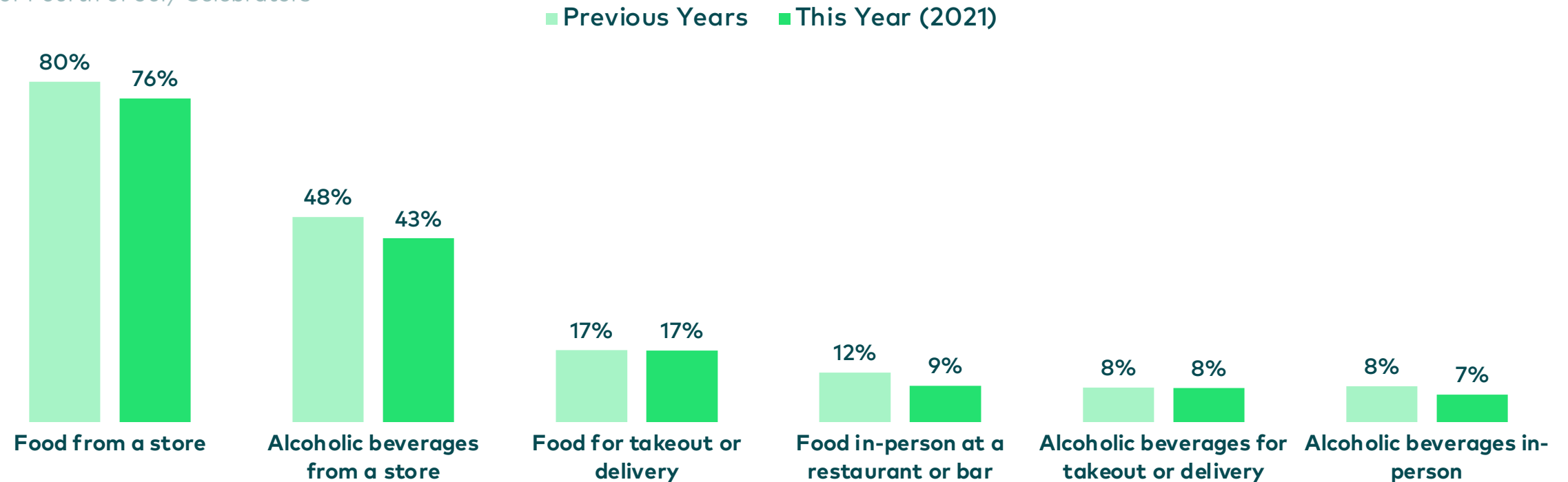


# Consumers aren't altering their purchases as much as they are altering their plans

With the typical hierarchy staying in place, 3 in 4 consumers are still planning on shopping for food from a store, only down 4% from previous years despite shifting plans.

## Thanksgiving Purchases

% of Fourth of July Celebrators



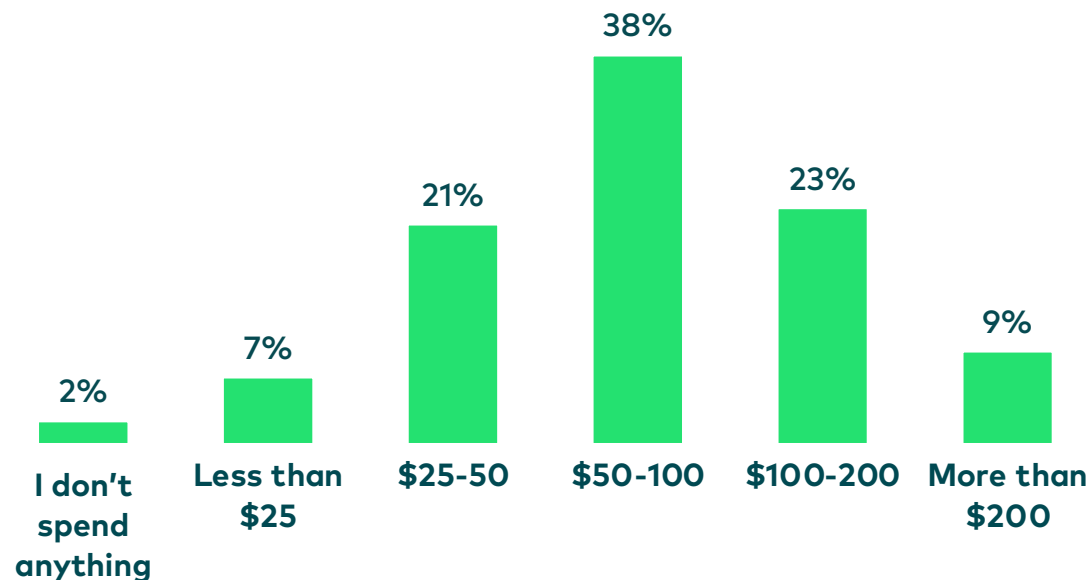


# Thanksgiving spend not likely to change significantly

2 in 3 Canadians expect to spend the same on their Thanksgiving celebrations this year as they have in past years. 3 in 5 consumers plan to spend between \$25 and \$100.

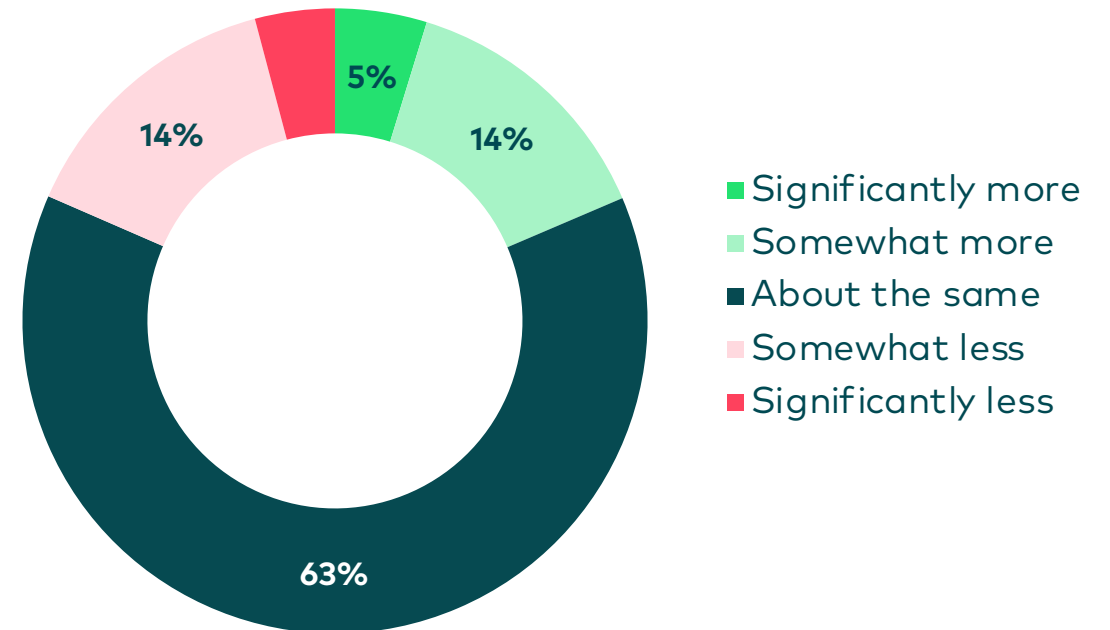
## Thanksgiving Spending

% of Thanksgiving Celebrators



## 2021 Expected Spend vs. Previous

% of Thanksgiving Celebrators





Want to know more?

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