2021 US Holiday Insights

2020 Key Holiday Trends to Inform 2021 Planning

October 2021
Will we see the world revert back to pre-pandemic holiday behaviors? 

Or are the shifts we saw in a locked down world likely to remain?

We looked at 2020 data to help inform 2021 trends, focusing on:

- Consumer Buying and Timing Trends
- Vertical Performance Trends
- Deep Dive into the DIY Gifter
Consumer Buying and Timing Trends
2020 holiday e-commerce accelerated

Brick-and-mortar buying was more limited, so buyers embraced digital

2% growth in US online holiday shopping, totaling $188.2 billion\(^1\)

$1 in every $4 spent on holiday retail purchases came from digital\(^2\)

$100B in November e-commerce sales, setting a new record\(^1\)

Sources: Based on 2020 seasonal data

1. CNBC, Americans spent a record online over 2020 holidays, Jan 2021
2. Digital Commerce 360, Online holiday sales grow, January 2021
Digital holiday buyers started early
How COVID has affected holiday shopping search trends

When looking back at 2019 pre-pandemic holiday shoppers, search interest began ramping up in late September and early October but with clear peaks in early and late December, highlighting that while there were some early shoppers, there was still a strong mid and late-season shopper.

Comparatively, 2020 saw a more gradual ramp up to December and a sharp decline, as more consumers needed to plan ahead for contactless delivery rather than purchasing and gifting in person. With USPS announcing they will slow delivery time by about 30%, this trend is likely to continue.

Sources:
1 Google Trends, Sept-Dec 2019-2020, US
2 NPR, Mail Delivery Is About To Get Slower And Pricier Just In Time For The Holidays, September 2021
Different audiences for each shopping period
Reach different buyers based on their purchase timeframes

Early Shoppers
- Female, Age 55+
- Age 40-49, HHI $50-150K

Peak Shoppers
- Female, Age 18-44
- Age 50-59

Last-Minute Shoppers
- Male, Age 35-54
- Age 35-39, HHI $150K+

Source: Quantcast Measure, Audiences compared to other holiday shoppers, Sept-Dec 2019-2020, US, CA
Connected devices surge
Reach consumers where they spend the most time

But where did consumers spend the majority of their digital time in November and December?

Quantcast saw usage of connected devices, such as smart TVs and game consoles, increase in late November and continue to grow throughout the holiday season. Newly activated devices that had been purchased for home entertainment and holiday gift-giving is a possible contributing factor to this growth.

Quantcast also found that mobile and desktop usage were inversely related, highlighting that early and peak shoppers are consistent across platforms, but that last-minute shoppers are more likely to be captured on their mobile devices.

Source: Quantcast Pixel Data, Device Usage; Oct 26 - Dec 27, 2020
Holiday buyers skewed older, more educated, and affluent

**Holiday vs. Non-Holiday Converters**

- **Age**
  - 55-59 | 110 index
  - 60-64 | 108 index
  - 65+ | 106 index

- **HHI**
  - $100-150K | 109 index
  - $150K+ | 112 index

- **Education**
  - Grad Degree | 109 index

*Source: Quantcast Pixel Data, Demographic Profile of converters
Vertical standouts in each segment drove these trends

### Holiday vs. Non-Holiday Converters

<table>
<thead>
<tr>
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Source: Quantcast Pixel Data, Demographic Profile of converters
2020 saw a hopeful holiday reveler
Travel and restaurants saw substantial Q3 to Q4 surges

Holiday 2020 saw some reopening, and consumers were eager to get back out in the world. Comparing the pre-holiday period (August 17 - September 20, 2020) to the holidays (November 30, 2020 - January 3, 2021), we saw a substantial surge in travel and restaurant conversions. Media entertainment, such as sporting events and theater, were unsurprisingly down.

The growths in these verticals can be attributed to consumers purchasing gifts, planning vacations as COVID restrictions loosened, and spending more time with family and friends during the holidays.

Source: Quantcast Data, Avg. Weekly Conversion Changes per Vertical

- **Retail**: +75.9%
- **Travel**: +51.7%
- **Restaurants**: +14.2%
- **Media & Entertainment**: -4.6%
Conversions with key seasonal standout dates
Understanding surges in behavior over time

Zooming out and looking at conversion volume starting in mid-August, we can see that there were two surges for travel—the first in late September and the second as part of the holiday wave in late November. Travelers were clearly more open to visiting family or taking vacations to make their 2020 holiday a bit more special. Interestingly, restaurants saw a decrease on both Thanksgiving and Christmas, showing that while people ate out with family in the days prior, that home cooking still reigned supreme for the day of festivity.

This holiday season, with the vaccine now widely available, the desire to travel and eat out is only likely to increase. Advertisers should get in front of tourism prospects early to encourage them to visit their city with awareness messaging.

Source: Quantcast Pixel Data, Vertical Level Conversions over time;
Aug 17, 2020 - Jan 3, 2021
Deep Dive: DIY Gifters
DIY gifters started their projects early
Interest in holiday DIY projects started after Halloween and peaks by December 1

With 2020 being the year that people explored their baking, crafting, and home gardening talents, we thought it would be interesting to better understand this holiday consumer. According to Etsy, holiday DIY searchers are looking to add their own personal creative flair to their home decorations and seasonal gifts, exploring their newfound crafting skills acquired during COVID lockdowns by searching for ideas, materials, and patterns.²

Quantcast keyword behavior mimics what we should assume: the time-sensitive nature of holiday gifting as well as time requirements for DIY projects mean searchers begin their considerations early in the season.

Sources:
1. Quantcast Measure, Sept-Dec 2019-2020, US
DIY gifters are crafty throughout the year

Holiday DIYers are similar to non-holiday DIY audiences. Even a significant holiday like Christmas attracts the same demographic audience.

**Holiday DIY 2020 keyword interest**
- **Gender**: Female | Index 122
- **Age**: 30-44 | Index 109
  - 55-59 | Index 110
- **Children**: Yes/No | Neutral Index
- **HHI**: $50-100k | Index 105

**Non-Holiday DIY 2021 keyword interest**
- **Gender**: Female | Index 111
- **Age**: 30-39 | Index 106
  - 60+ | Index 107
- **Children**: Yes/No | Neutral Index
- **HHI**: $50-100k | Index 106

**Source**: Quantcast Measure,
Hot topics for the hot glue gunner

Holiday gift DIYers are looking for these 5 things:

1. Easy to make
2. Related to food
3. Inexpensive
4. A list of ideas
5. Shipping-friendly

Actioning on insights
How to plan for this year’s holiday season
Reach your audience at the right time

Start early
While the bulk of holiday conversions don’t happen until late November, we expect this year’s holiday trends to be similar to 2020. Many COVID restrictions have lifted, but there remains a significant audience who will eschew large social gatherings and consider delivery rather than in-person gifting.

Timing matters!
In both pre-pandemic and post-pandemic years, younger shoppers consistently tend to be the last minute-shoppers. Tailor your messaging, depending on the timing of the season.

Know which verticals are important for holiday consumers
Be mindful of high-impact verticals during the holiday season. A retail marketer may want to invest in media during the holidays as consumer intent on purchasing gifts increases, whereas education advertisers should be wary of schools being closed during this period.
Consumer holiday highlights
Find your audience with actionable insights

Digital dominates
More people are buying online than ever before, but they buy a bit earlier to ensure their gifts arrive on time. Invest in digital early to prime audiences and drive them to purchase your products.

Areas of Opportunity in Travel and Dining
Travel and restaurants saw substantial Q3 to Q4 surges (+52% and +14% respectively). Understand that consumers are eager to spend on experiences again, so tourism and experience gifts may be seeing a resurgence.

Understand the DIY Gifter
They are a crafter in general, start their projects early, and are looking for easy-to-make and easy-to-ship inexpensive gifts. Homegoods retailers can leverage these learnings to connect with crafters with customized messaging.
Work with Quantcast to action on insights

Tap into the power of unique real-time data to drive brand and performance outcomes for your holiday budgets.

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