
2021 US Holiday Insights

2020 Key Holiday Trends
to Inform 2021 Planning

October 2021

Quantcast

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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



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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 billion¹



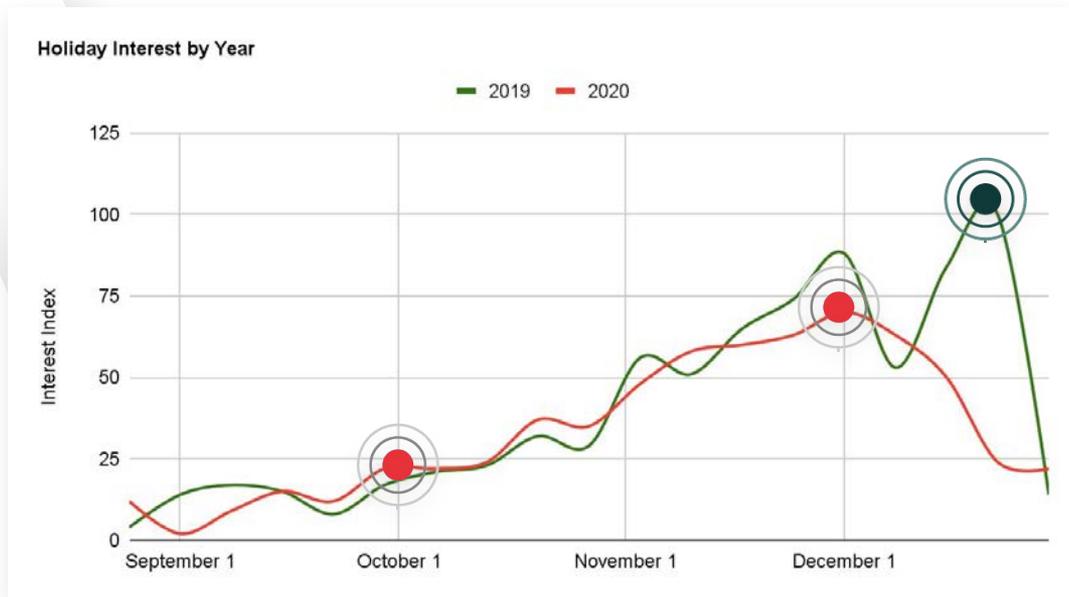
\$1 in every **\$4**
spent on holiday
retail purchases
came from digital²



\$100B
in November
e-commerce sales,
setting a new record¹

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.²

Different audiences for each shopping period

Reach different buyers based on their purchase timeframes



Early Shoppers

2019 Female, Age 55+

2020 Age 40-49, HHI \$50-150K



Peak Shoppers

2019 Female, Age 18-44

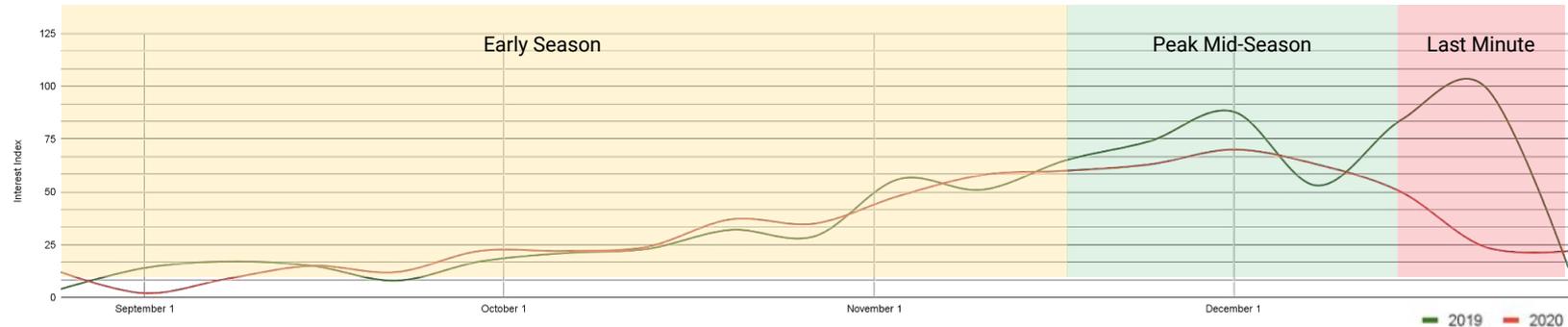
2020 Age 50-59



Last-Minute Shoppers

2019 Male, Age 35-54

2020 Age 35-39, HHI \$150K+



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Source: Quantcast Measure, Audiences compared to other holiday shoppers, Sept-Dec 2019-2020, US, CA

Connected devices surge

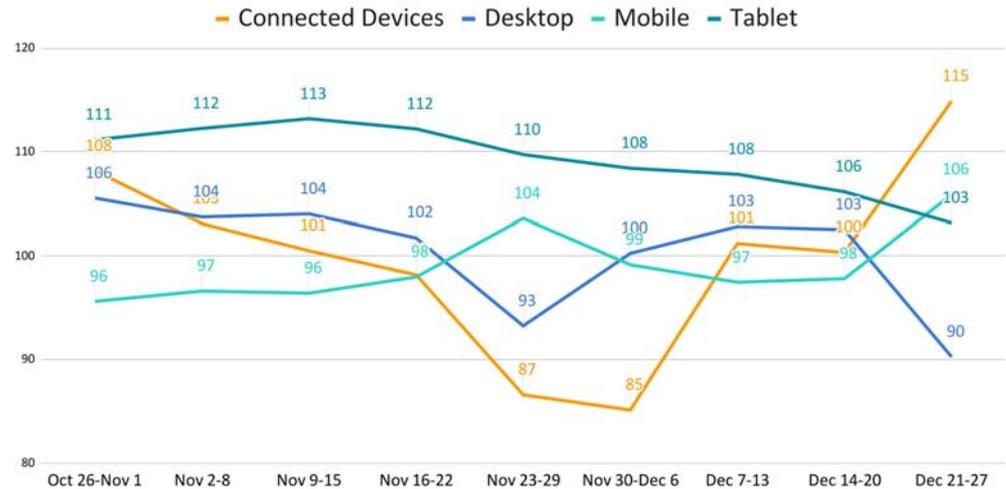
Reach consumers where they spend the most time

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.

2020 Device Usage Affinity (Indexed)





Vertical Performance Trends



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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
Comparing Non-Holiday Period: 8/17/20 - 9/20/20 v. Holiday Period: 11/30/20 - 1/3/21

Vertical standouts in each segment drove these trends

Holiday vs. Non-Holiday Converters



Age **55-59** | 116 index | **Retail**
125 index | **Media & Entertainment**
60-64 | 111 index | **Automotive**



HHI **\$100-150K** | 114 index | **Retail**
\$150K+ | 184 index | **Education**
115 index | **Travel**



Education **Grad Degree** | 116 index | **Retail**
113 index | **Technology**

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Source: Quantcast Pixel Data, Demographic Profile of converters
Comparing Non-Holiday Period: 8/17/20 - 9/20/20 v. Holiday Period: 11/30/20 - 1/3/21



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.



+75.9% Retail



+51.7% Travel



+14.2% Restaurants



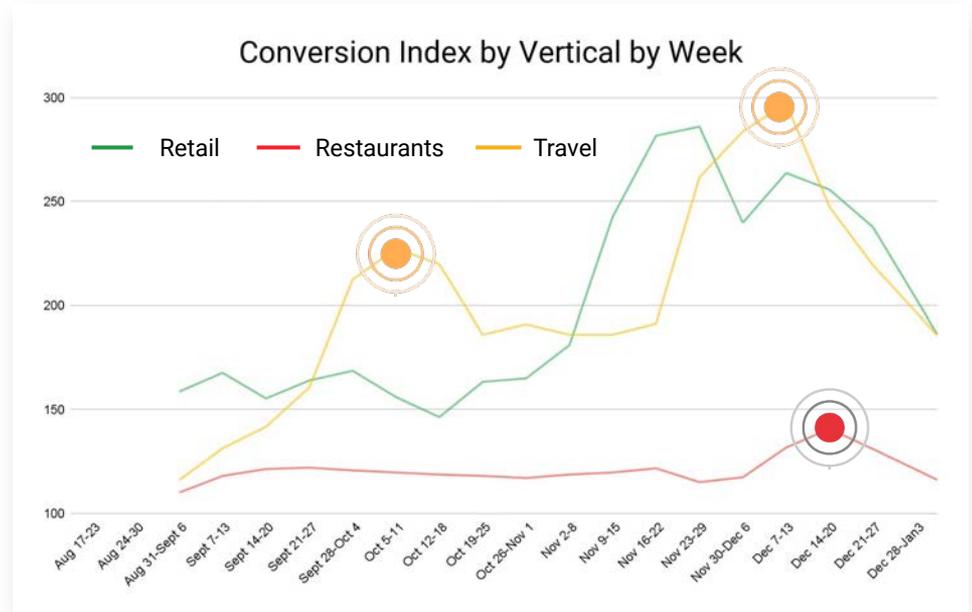
-4.6% Media & Entertainment

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.





Deep Dive: DIY Gifters



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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.



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



Actioning on insights



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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.



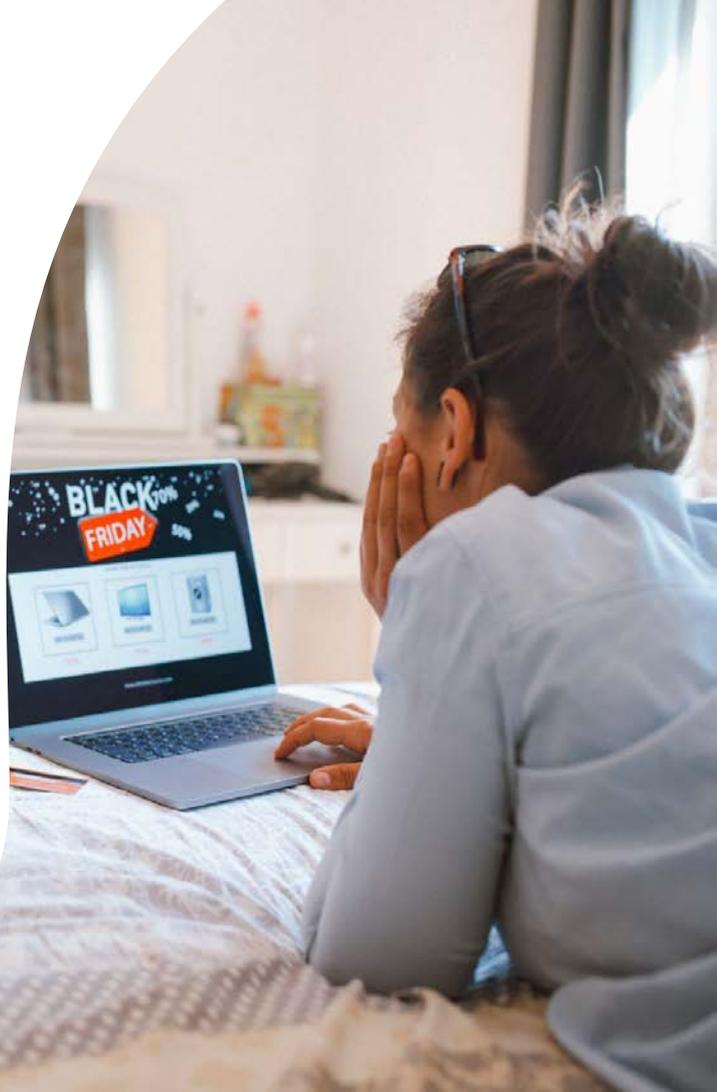
Areas of Opportunity in Travel and Dining

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.





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