

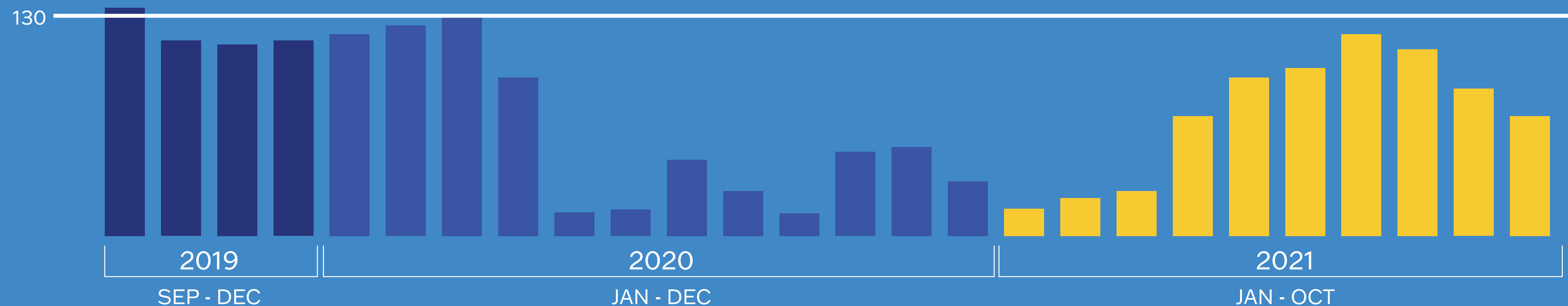


WHAT'S **in** STORE

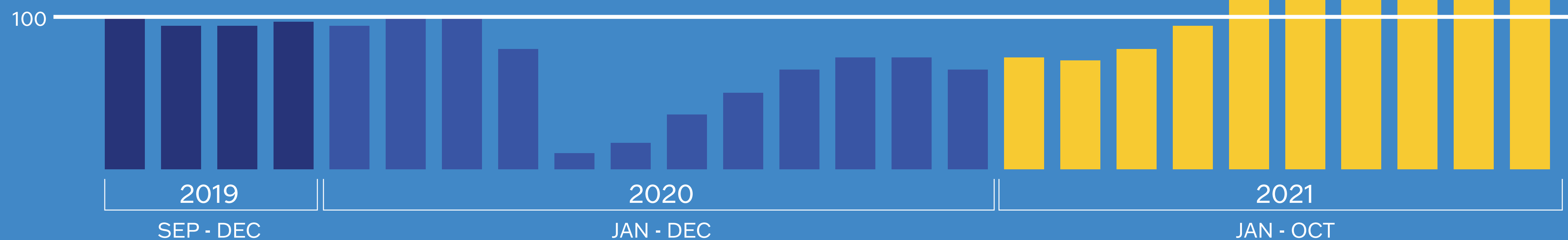
HOLIDAY 2021 PREVIEW

CONSUMER CONFIDENCE

US CONFERENCE BOARD CONSUMER CONFIDENCE



EUROZONE BUSINESS & CONSUMER CONFIDENCE SURVEY



U.S.

\$2.4 TRILLION SAVED
BY CONSUMERS DURING PANDEMIC

EUROZONE

\$450 BILLION SAVED
BY CONSUMERS DURING PANDEMIC



**1/3 OF CONSUMERS SAY
THEY WILL BE SPENDING MORE
IN HOLIDAY 2021 THAN 2020**

HEADWINDS FOR SPENDING



**SUPPLY CHAIN
SHORTAGES**

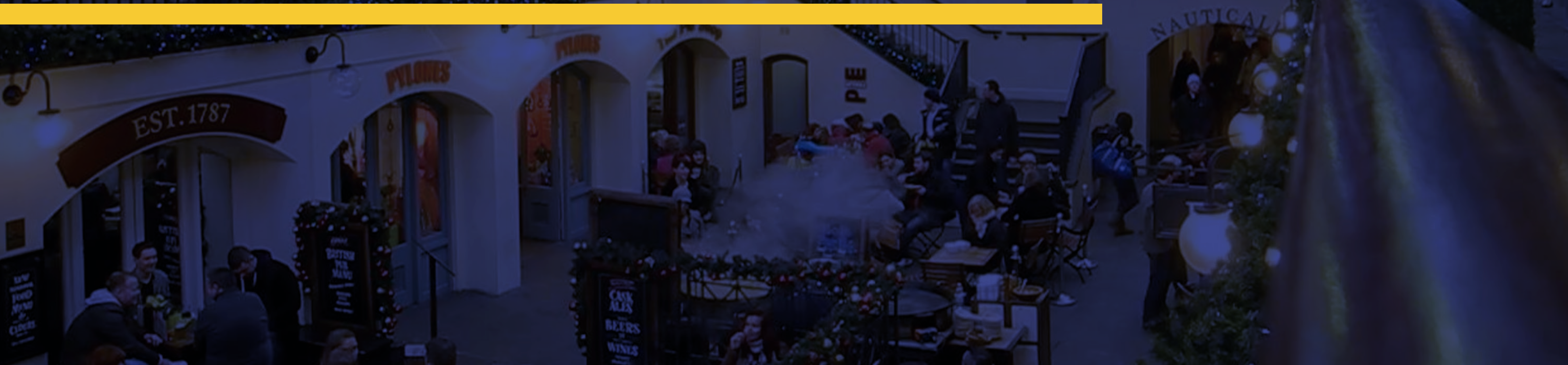


**LABOR
CONSTRAINTS**



**INFLATION
RATES**

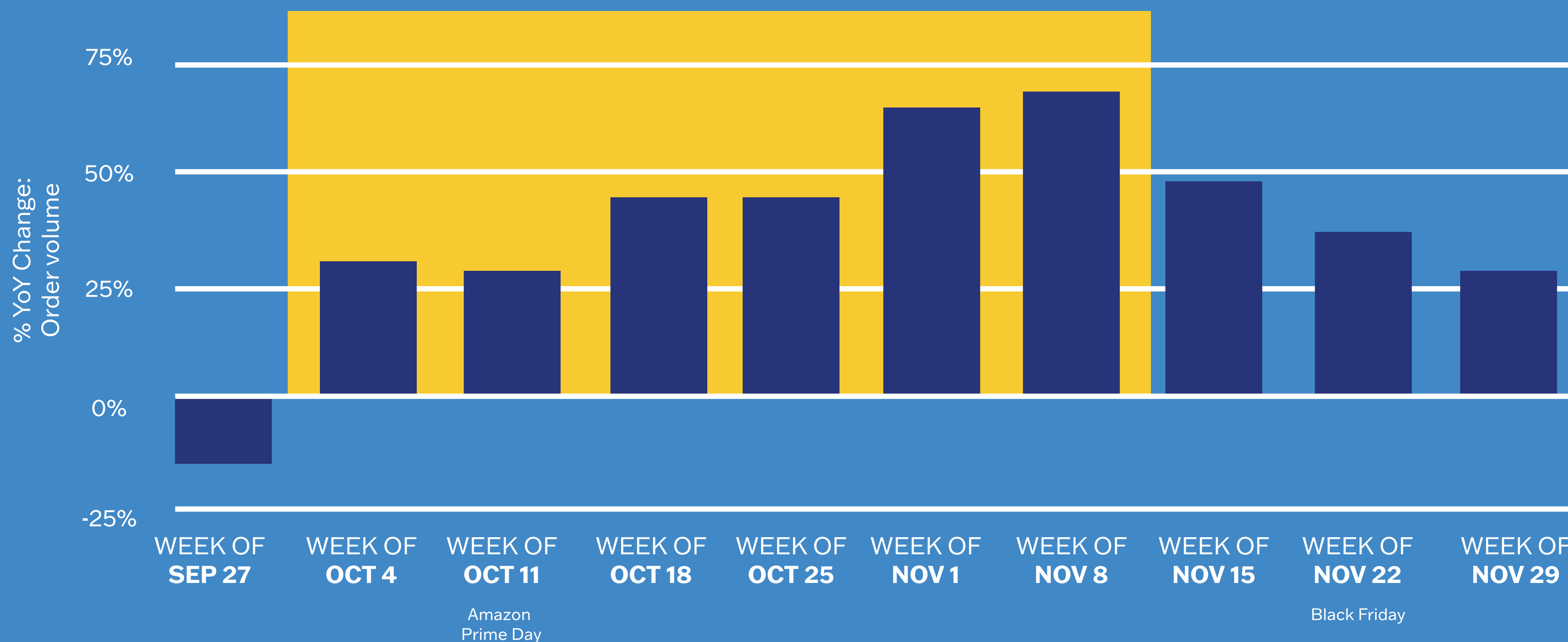
EARLIER START TO HOLIDAY SHOPPING





**25% OF UK CHRISTMAS SHOPPERS
STARTED THINKING ABOUT SHOPPING
BEFORE THE END OF AUGUST**

US CONSUMERS STARTED SHOPPING ONLINE MUCH EARLIER IN 2020



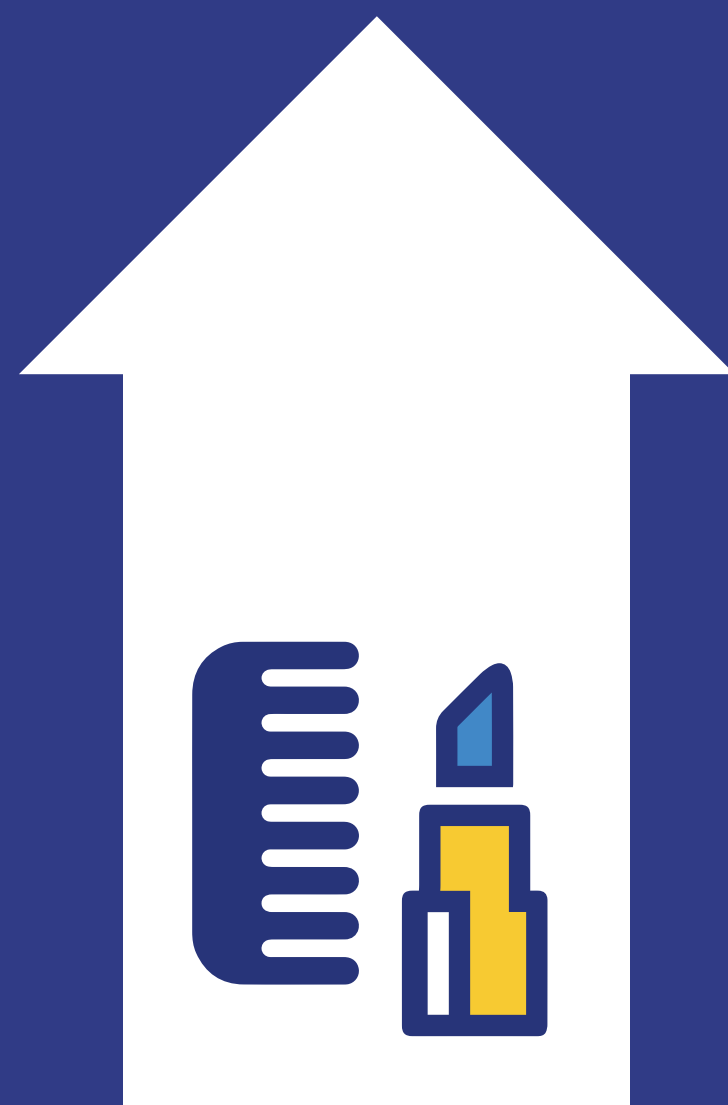
**2021 HOLIDAY SALES
EXPECTED TO GROW 8-13%**



\$203 BILLION
ACCORDING TO NRF

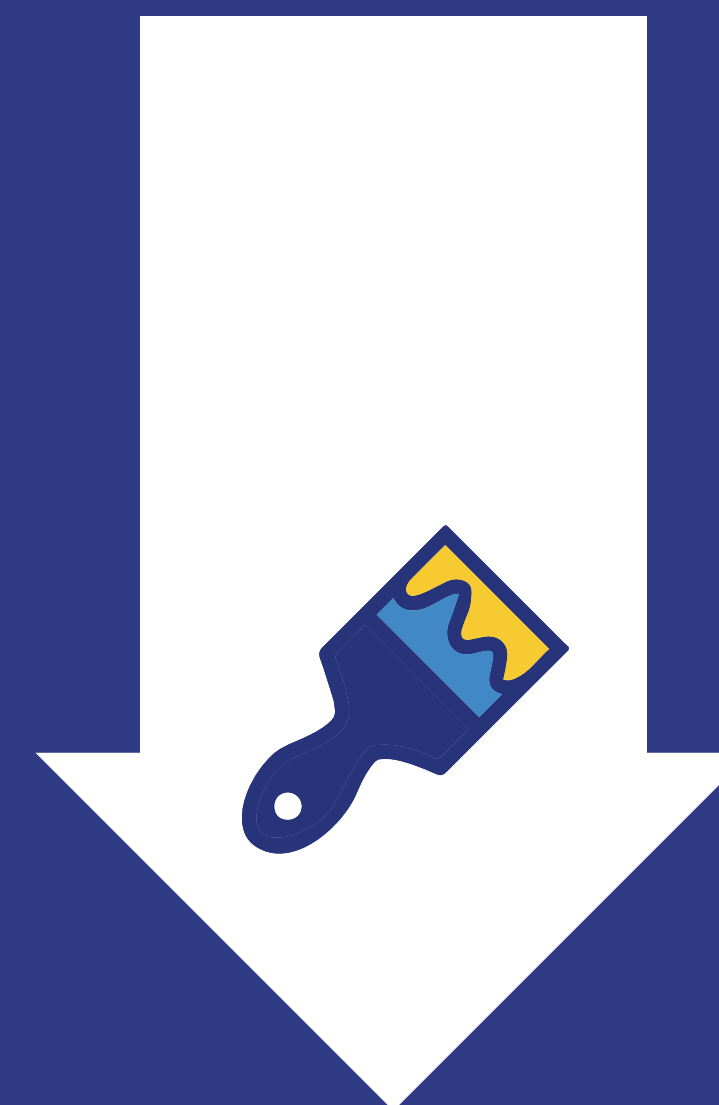
HEALTH & BEAUTY

**EXPECTED TO
PERFORM WELL**



DIY & GARDENING

**WILL LOSE
RELATIVE SHARE**



WHAT RETAILERS WILL BE DOING



**ENCOURAGING
CLICK & COLLECT**



**EARLIER BUT SMALLER
PROMOTIONS**



**LEVERAGING DELIVERY
INTERMEDIARY
PARTNERSHIPS**



**DEMONSTRATING
SUSTAINABILITY**



WHAT'S **in** STORE

HOLIDAY 2021 PREVIEW

STAY IN TOUCH WITH US FOR MORE RETAIL INSIGHTS

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