

Seasonal Shopping (Spring/Summer): Inc Impact of COVID-19 - UK - October 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“COVID-19 significantly impacted consumer spending for 2020 summer/spring seasonal events as lockdown restrictions forced many to celebrate Easter and Father’s Day apart from key family members.”
– Emily Viberg, Retail Analyst

This report looks at the following areas:

This Report looks at the following areas:

- The impact of COVID-19 on seasonal shopping.
- Consumer behaviours related to seasonal shopping.
- How retailers can encourage spend at seasonal events when consumer confidence is low.
- How retailers can be more thoughtful during Mother’s Day and Father’s Day.

COVID-19 significantly impacted consumer spending for 2020 summer/spring seasonal events, which totalled an estimated £1.4 billion, down 54.1% on 2019. Mother’s Day benefitted from falling just before the UK went into a nationwide lockdown and non-essential stores remained open, surpassing Easter as the biggest event for the period at an estimated £644 million. Despite this, spending was down from £1,060 million the previous year as people cut-back on non-essential spending in preparation for the upcoming lockdown.

Easter saw the biggest decline year-on-year (64.6%) as the event was celebrated in lockdown, with many celebrating the day apart from key family members, discouraging many from celebrating the occasion completely. As a result, Easter was worth an estimated £420 million in 2020. Father’s Day also saw a significant decline in consumer spending, down 64% to £381 million, and did not seem to benefit from pent-up demand as consumers emerged from lockdown. Instead, we saw a higher level of activity engagement from consumers in 2020 (37%) compared to 2019 (33%).

Seasonal events are particularly sensitive to macro-economic factors so the COVID-19 crisis, which will have lasting economic impacts on the UK economy and household income, is expected to significantly affect next year’s seasonal events. We expect to see consumers holding back on discretionary spend as the impact of the COVID-19 recession lingers on and Brexit adds further uncertainty to levels of consumer confidence.

However, despite low consumer confidence, retailers can encourage spend by offering affordable ways to celebrate events, with a focus on premium own-label food and drink ranges that can compete with out-of-home dining experiences. Retailers can also tap into the sense of goodwill heightened by COVID-19 during sensitive times like Mother’s Day and Father’s Day in 2021 for those who will be reminded of friends and family members who have suffered or passed away during the crisis.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Seasonal Shopping (Spring/Summer): Inc Impact of COVID-19 - UK - October 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

Key issues covered in this report

Products covered in this Report

Executive Summary

Impact of COVID-19 on seasonal shopping

Figure 1: Short, medium and long term impact of COVID-19 on seasonal shopping, October 2020

The market

Consumer spending on seasonal events at £1.4 billion in 2020

Figure 2: Estimated consumer gift spending on the spring/summer retail events in 2019 and 2020

Consumer confidence wanes amid COVID-19

Figure 3: Consumer financial confidence, January 2018-August 2020

Consumers cut back on non-essential spending

Figure 4: Consumers who are cutting back on non-essential spending and time-spent in store, September 24-October 1 2020

First half of 2020 off to a rocky start due to COVID-19

Figure 5: Value of all retail sales (excluding fuel) at current prices, non-seasonally adjusted, by month, January 2018-Aug 2020

Online to capture Christmas spend as demand moves online

Figure 6: Value of all online retail sales at current prices, non-seasonally adjusted, by month, January 2019-August 2020

Companies and brands

Advertising spend increases in 2019

Figure 7: Annual percentage change in total above-the line, online display and direct mail advertising expenditure by all retailers, by month, January 2019-August 2020

Key campaigns reflect new COVID-19 reality

Innovations help shoppers celebrate seasonal events at home

The consumer

Gift purchasing for seasonal events was down compared to 2019

Figure 8: Any gift-buying amongst consumers aged 16+, May-July 2020

Small ticket purchases drove seasonal gifting in 2020

Figure 9: Products bought by consumers for Mother's day, Father's Day and Easter in 2020, May-July 2020

Average spend per consumer down on 2019

Figure 10: Average spend by shoppers for seasonal events in 2020, May-July 2020

In-store still dominates seasonal purchases

Figure 11: How shoppers purchased gifts for seasonal events in 2020, May-July 2020

Supermarkets the go-to place for seasonal shopping

Figure 12: Where shoppers go to purchase gifts for seasonal events in 2020, May-July 2020

Most will buy gifts in advance for Mother's Day and Father's Day

Figure 13: Mother's Day and Father's Day actions, May-July 2020

Consumers celebrate Mother's Day with a special meal at home

Figure 14: Mother's Day activities in 2020, April 2020

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Seasonal Shopping (Spring/Summer): Inc Impact of COVID-19 - UK - October 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Mother's and Father's Day shoppers interested in exclusive deals for loyal customers

Figure 15: Interest in innovations for seasonal events In 2020, May and July 2020

Shoppers look for long-lasting Mother's Day gifts

Figure 16: Mother's Day behaviours in 2020, April 2020

Shoppers go for branded Easter eggs

Figure 17: Types of eggs purchased for Easter in 2020, May 2020

Tesco is a favourite for Easter chocolate products

Figure 18: Which retailers shoppers use to purchase Easter products from in 2020, May 2020

Concerns remain over plastic levels in Easter products

Figure 19: Easter behaviours in 2020, May 2020

What we think

COVID-19 and Seasonal Shopping

Impact on the market

Consumer spending down on 2019 for seasonal events

Consumers cut back on non-essential spending

Impact on consumers

Small ticket items drove seasonal gifting

Average spend down on 2019

Significant increase in online shopping for seasonal events

Celebrating Father's Day virtually

Consumers appreciate retailers who consider those who have lost a parent

Impact on companies and brands

Innovations aimed at reflecting COVID-19 reality

Key campaigns focus on celebrating seasonal events from lockdown

Issues and Insights

How can retailers encourage spend when consumer confidence is low?

The facts

The implications

Capture spend with exclusive deals for loyal customers

Promote premium food and drink ranges with interactive dining-in experiences

How can retailers be more inclusive at seasonal events?

The facts

The implications

The Market – Key Takeaways

Consumer gift spending down 54.1% in 2020

Declining wage growth dampens consumer spend for seasonal events

37% of consumers cut back on non-essential spending

2021 set for more favourable conditions

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Seasonal Shopping (Spring/Summer): Inc Impact of COVID-19 - UK - October 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Market Size and Segmentation

Impact of COVID-19 on seasonal shopping

Figure 20: Short, medium and long term impact of COVID-19 on seasonal shopping, October, 2020

Lockdown

Re-emergence

Recovery

Consumer gift spending impacted by COVID-19

Figure 21: Estimated consumer gift spending on spring/summer retail events in 2019 and 2020

Spending down on key categories in 2020

Figure 22: Estimated breakdown of consumer spending on gifts and other products for spring/summer retail events, 2020

Market Drivers

Seasonal events need to be inclusive towards an ageing population

Figure 23: Breakdown of trend in the age structure of the UK population, 2020-30

Figure 24: Breakdown of trend in the age structure of the UK population, 2020-30

Declining wage growth dampens consumer spend for seasonal events

Figure 25: Real wage growth - average weekly earnings vs inflation, 2016-2020

Consumer confidence wanes amid COVID-19

Figure 26: Consumer financial confidence, January 2018-August 2020

Consumers cut back on non-essential spending

Figure 27: Consumers who are cutting back on non-essential spending and time-spent in store, September 24-October 1 2020

Retail Sales Across the Year

Autumn captures largest share of retail sales

Figure 28: Value of all retail sales (excluding fuel) at current prices, non-seasonally adjusted, by season, 2019

First half of 2020 off to a rocky start due to COVID-19

Figure 29: Value of all retail sales (excluding fuel) at current prices, non-seasonally adjusted, by month, January 2018-August 2020

Figure 30: Annual percentage change in all retail sales (excluding fuel) at current prices, non-seasonally adjusted, by month, January 2018-August 2020

Clothing hit hard by COVID-19 but grocery sales survive

Figure 31: Annual percentage change in leading category retail sales at current prices, non-seasonally adjusted, by month, January-August 2020

Spring and summer months in focus

Figure 32: Value of retail sales (excluding fuel) at current prices, non-seasonally adjusted, by spring/summer months, 2018-20

Online Retail Sales Across the Year

Online to capture Christmas spend as demand moves online

Figure 33: Value of all online retail sales at current prices, non-seasonally adjusted, by month, January 2019-August 2020

Grocery sector benefits from demand moving online

Figure 34: Online retail sales as a percentage of all retail sales, by month, January 2018-August 2020

Figure 35: Online retail sales as a percentage of all retail sales, by category, by month, January 2019-Aug 2020

Companies and Brands – Key Takeaways

Digital channel accounts for 20% of advertising spend in 2020

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Seasonal Shopping (Spring/Summer): Inc Impact of COVID-19 - UK - October 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Key campaigns reflect new COVID-19 reality
Innovations help shoppers celebrate seasonal events at home
Retailers should innovate in areas that interest consumers

Advertising and Marketing Activity

November captures most advertising spend in 2019

Figure 36: Total above-the-line, online display and direct mail advertising expenditure by all retailers, by month, January 2019-August 2020

Advertising spend increases in 2019

Figure 37: Annual percentage change in total above-the line, online display and direct mail advertising expenditure by all retailers, by month, January 2019-August 2020

November has biggest share of ad spend in 2019

Figure 38: Recorded above-the-line, online display and direct mail total advertising expenditure by all retailers, monthly as a % of total spending, 2019

TV continues to be the channel of choice for advertisers in 2019...

Figure 39: Recorded above-the-line, online display and direct mail total advertising expenditure by all retailers, by advertising method, 2019

...but digital increases in 2020 as spend is directed online

Figure 40: Recorded above-the-line, online display and direct mail total advertising expenditure by all retailers, by advertising method, January-August 2020

Advertising spend for spring/summer down 46.8% in 2020

Figure 41: Recorded above-the-line, online display and direct mail total advertising expenditure by all retailers during the spring and summer months March-August, 2018-20

Key campaigns focus on celebrating seasonal events at home

Chanel's US Father's Day and Mother's Day campaign

Figure 42: Chanel's Mother's Day and Father's Day campaign, 2020

Sainsbury's 'Be you- Mum (and some)' and Father's Day campaign

Figure 43: Sainsbury's Mother's Day and Father's Day campaigns, 2020

Tesco's Food Love Story for Father's Day

Figure 44: Tesco's Father's Day campaign, 2020

Bloom and Wild's 'Thoughtful Marketing' campaign

Nielsen Ad Intel coverage

Launch Activity and Innovation

COVID-19 launches

Filthy Sentiments launches COVID-19-related Mothers' Day cards

Figure 45: Filthy Sentiments' COVID-19 related Mother's Day cards, 2020

Louis Vuitton's #WELVMOMS e-card service

Figure 46: Louis Vuitton's complimentary e-card personalisation service, 2020

Moonpig's blood donation card range for Mother's Day

Figure 47: Moonpig's Mother's Day card range, 2020

KitKat Chocolatory personalisation service

Figure 48: KitKat Mother's Day personalisation service, 2020

Waitrose donates confectionery to NHS workers

Figure 49: John Lewis and Waitrose donating Easter eggs to NHS workers, 2020

Unusual shapes and sizes

Deliveroo's invisible Easter egg

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Seasonal Shopping (Spring/Summer): Inc Impact of COVID-19 - UK - October 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 50: Deliveroo's invisible gelatine Easter eggs, 2020

Tesco unicorn and dinosaur Mother's Day bouquets

Figure 51: Tesco's Mother's Day flower bouquet, 2020

Aldi launches giant Easter eggs

Figure 52: Aldi's giant Easter chocolate eggs, 2020

Waitrose X Heston Easter egg range

Figure 53: Heston Blumenthal's lemon Easter egg, 2020

Royal Mail's dedicated Mother's Day post-box

Figure 54: Royal Mail's dedicated Mother's Day parcel post-box, 2020

More chocolate but less plastic in this year's Easter eggs

Asda's new sustainable packaged Easter egg

Figure 55: Asda's repackaged Easter eggs, 2020

Hotel Chocolat adds dairy-free eggs to its vegan line

Figure 56: Hotel Chocolat's dairy-free egg, 2020

The Consumer – Key Takeaways

Small ticket purchases drove seasonal gifting

In-store still dominated seasonal purchases

9% of consumers celebrated Father's Day 'virtually' in 2020

18% of Father's Day shoppers would be interested in exclusive deals

68% of Mother's Day shoppers appreciate retailers who consider those who have lost a parent

79% of Easter shoppers go for branded Easter eggs

Impact of COVID-19 on Consumer Behaviour

Consumers prioritise essentials

Figure 57: Consumers who are cutting back on discretionary spend, limiting time in store and shopping more online, September 24-October 1, 2020

In-home food and drink expected to grow as consumers stay indoors

Figure 58: How consumers feel about attending a restaurant/bar outdoors, September 24-October 1, 2020

Seasonal spending set to be subdued as consumers struggle financially

Figure 59: Consumers' financial situation during COVID-19 pandemic, 30th July 2020 - 7th August 2020

What They Buy

Gift purchasing for seasonal events down compared to 2019

Figure 60: Any gift-buying amongst consumers aged 16+, May-July 2020

Small ticket purchases drive seasonal gifting

Figure 61: Products bought by consumers for Mother's Day, Father's Day and Easter in 2020, May-July 2020

Men aged 16-34 treat mothers to flowers and chocolates

Figure 62: Products bought by consumers for Mother's Day, Father's Day and Easter in 2020, by age group, May-July 2020

Seasonal shoppers tend to buy one gift/product

Figure 63: Repertoire of products purchased for spring/summer events in 2020, May-July 2019

How Much They Spend

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Seasonal Shopping (Spring/Summer): Inc Impact of COVID-19 - UK - October 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Average spend per consumer down on 2019

Figure 64: Average spend by shoppers for seasonal events in 2020, May-July 2020

AB consumers spend the most on seasonal gifts

Figure 65: Average spend by shoppers for seasonal events in 2020, by socio-economic groups, May-July 2020

How They Shop

In-store still dominates purchases

Figure 66: How shoppers purchased gifts for seasonal events in 2020, May-July 2020

Men prefer to shop online

Figure 67: How shoppers purchased gifts for seasonal events in 2020, by gender, May-July 2020

Which Retailer They Use

Supermarkets the go-to place for seasonal shopping

Figure 68: Where shoppers go to purchase gifts for seasonal events in 2020, May-July 2020

Mother's Day and Father's Day Actions

Most will buy gifts in advance

Figure 69: Mother's Day and Father's Day actions, May-July 2020

Mother's Day and Father's Day Activities

Consumers celebrate Mother's Day with a special meal at home

Figure 70: Mother's Day activities in 2020, April 2020

Celebrating Father's Day virtually

Figure 71: Father's Day activities in 2020, July 2020

Interest in Innovations for Mother's Day and Father's Day

Interest in exclusive deals to reward loyal customers

Figure 72: Interest in innovations for seasonal events in 2020, May and July 2020

Mother's Day and Father's Day Behaviours

Shoppers look for long-lasting Mother's Day gifts

Figure 73: Mother's Day behaviours in 2020, April 2020

Consumers appreciate retailers who consider those who have lost a parent

Figure 74: Father's Day behaviours in 2020, July 2020

What Type of Easter Eggs They Buy

Shoppers go for branded Easter eggs

Figure 75: Types of eggs purchased for Easter in 2020, May 2020

Easter shoppers buy one product

Figure 76: How many types of chocolate products were bought for Easter in 2020, May 2020

Where They Shop for Chocolate Products

Tesco is a favourite for Easter chocolate products

Figure 77: Which retailers shoppers used to purchase Easter products from in 2020, May 2020

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Seasonal Shopping (Spring/Summer): Inc Impact of COVID-19 - UK - October 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Easter Behaviours

Concerns over plastic remain

Figure 78: Easter behaviours in 2020, May 2020

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com