

Holiday Shopping Styles

November 2014

'Tis the Season

The 2014 outlook for holiday spending is optimistic. Many industry analysts suggest that retailers will see a 4 percent increase in spending compared to 2013. Online spending is predicted to jump by 16 percent as shoppers connect via PC, laptop and mobile devices to snag holiday deals. All signs point north – to the North Pole, that is.

While holiday shopping surveys, spending predictions and reports on this year's hottest gifts are in no short supply, we wanted to look deeper into what's behind those numbers – that is, not only what consumers are spending and who's on their list, but also delve into their "holiday spirit" and shopping styles. In October, SAS conducted online research among 2,007 adult US holiday shoppers. This report summarizes some of the key findings of that research.

Five Findings From the Survey About Holiday Shoppers

- Forget the post-turkey nap and football game. One-fourth of those surveyed will be at the mall on Thanksgiving Day.
- Suit up for the crowds during the Black Thursday through Cyber Monday shopping frenzy. Two-thirds of us will shop during those days.
- Look for a gift worth nearly \$300 from your spouse or significant other, but don't be surprised if it isn't what you asked for.
- You can't go wrong with the gift card. But most givers are coupling cards with other gifts.
- Be prepared for lines. Most of us are doing our research on the web, but still prefer old-school bricks and mortar stores to buy our holiday gifts.

Let's Talk Turkey

Thanksgiving Day shopping will lure 27 percent of holiday shoppers

More than a third of holiday shoppers will start buying gifts *before* Thanksgiving this year. More retail stores will be open this year on Thanksgiving Day, enticing post-feast shoppers to spend their holiday budget.

And this new Turkey Day tradition seems to be catching on. One-fourth of shoppers plan to visit retail stores open on Thanksgiving. What's more, our survey says that those planning to shop on Thanksgiving may actually spend more than other shoppers. And they are more likely to buy gadgets this year – smartphones, tablets and wearable technology.

The shopping day won't end when the mall closes, though. Two-thirds of those who plan to walk off the turkey dinner shopping at the mall also plan to shop online on Thanksgiving. Those who elect to pass on the post-meal shopping trip will not be enticed by Thanksgiving specials; and only 20 percent will opt to shop online on Thursday.

Let's Get Ready to Rumble

"Traditional" Black Friday will bring 40 percent of shoppers to bricks and mortar

Thanksgiving shoppers also will battle the even larger crowds on Black Friday. Eight in 10 Thanksgiving Day shoppers indicate they also will shop on Black Friday, but only 22 percent of those who stayed home Thursday will venture out on Friday. Women are more likely than men (44 percent versus 37 percent) to brave the Black Friday crowds this year, but equal proportions plan to shop on Thanksgiving.

Half of all holiday shoppers plan to shop online on Black Friday, with only slightly more (53 percent) turning out for Cyber Monday.

Making the List, Checking It Twice

Holiday shoppers will buy gifts for an average of 13 people, mostly family

Not surprising, the majority of those who are on the holiday gift list are family. Nine in 10 shoppers will be buying for adult family members, while three-quarters are shopping for children in the family. Most shoppers buy for the same number of people as last year, while a third are buying for more people. Just 10 percent are cutting back.

Shoppers in our survey plan to spend an average of \$1,119 on gifts this year. The vast majority (83 percent) of this will go toward family gifts.

On the list	% of Respondents	Average number of people	Planned spending per person
Spouse or significant other	63%	1	\$299
Family members 18 and over	90%	5.7	\$120
Family members under age 18	74%	4.3	\$110
Friends	63%	4.1	\$57
Co-workers	23%	3.3	\$38
Neighbors	19%	4.5	\$26
Others	7%	4.1	\$44

About two-thirds of shoppers will buy for a spouse or significant other this year and spend an average of \$299. Among those who are in a relationship, only 7 percent indicated that they aren't exchanging gifts this year.

A similar proportion (63 percent) plan to buy for friends at \$57 a gift. About one-fourth will give to co-workers, spending an average of \$38, and one-fifth will exchange with neighbors, budgeting \$26 per gift. Women are more likely than men to be the purchasers of gifts for children in the family (80 percent versus 67 percent).

Oh, Those Tacky Holiday Sweaters

Apparel and gift cards are the primary gifts this year, with electronics not far behind

Kids under 12 can still expect to find toys under the tree this year along with traditional Christmas clothes and some electronics. However, shoppers are most likely to give gift cards to family members ages 13 and up, followed by apparel. Shoppers typically bundle gift cards with other presents, so look for a wrapped package under the tree along with an envelope.

Electronics are the third-most-popular planned purchase for family members ages 7 to 29. For those older than 30, household goods, books and music, and cosmetics and fragrance edge out electronics on shoppers' lists.

Male shoppers are more likely to buy electronics, while women are more inclined toward the soft goods.

Shoppers plan to buy their spouses or significant others more than one gift with the allotted \$299 they are spending this year. Women will likely find a little bling (jewelry, 49 percent), apparel (46 percent) or cosmetics or fragrance (29 percent) under the tree. But only 8 percent of women say jewelry is the one thing on their list this year, while the top requested item is gift cards (24 percent).

Men will likely be unwrapping a sweater (apparel, 56 percent) or electronics (42 percent) and maybe a gift card (25 percent). The one thing that men hope for this year? Electronics is the No. 1 answer (25 percent).

Holiday Shoppers' Family Gift List						
What are you likely to buy for...	Children			Adults		Spouse/ Significant Other
	Under age 7	7 to 12 years	13 to 17 years	18 to 29 years	30 and over	
Apparel/Accessories	56%	49%	52%	51%	48%	51%
Books or Music	NA	NA	NA	29%	31%	20%
Cosmetics/Fragrance	12%	12%	23%	31%	28%	25%
Electronics	33%	45%	44%	35%	27%	34%
Food or Beverage	10%	10%	11%	15%	23%	12%
Gift Card	27%	38%	60%	64%	57%	24%
Household Goods	NA	NA	NA	22%	36%	15%
Jewelry	11%	14%	20%	23%	25%	32%
Money	18%	27%	40%	30%	21%	9%
Toys, Books or Music	87%	69%	27%	NA	NA	NA
Other	3%	3%	3%	4%	4%	9%

The Mall Still Rules

Shoppers are cyber-smart, but in-store buys will trump online

Holiday consumers will shop both in retail stores and online (85 percent and 81 percent, respectively), but those doing both will primarily make the purchase in the store. Two thirds of shoppers will “webroom” this holiday season, searching for information about gifts online before buying.

Online buyers will still primarily rely on their PCs and laptops, but four in 10 will use both a mobile device and a PC. Only one in 10 shoppers will use mobile alone.

Seven Distinct Holiday Shoppers Will Spread Good Cheer This Year

Our survey results helped us group holiday shoppers according to their attitudes and shopping styles. The following groups emerged (listed in descending order based on the average amount spent on holiday gifts):

- **Black Friday Warriors** (21 percent of those surveyed/spend an average of \$1,422) are those people you see standing in line, waiting for Best Buy to open on Thanksgiving. They love the holidays.
- **Budget Busters** (11 percent/\$1,132) shop throughout the holiday season and buy a wide variety of gifts for many recipients. They indulge loved ones, will pay for convenience, exceed their planned budgets, and find gift cards impersonal.
- **Practical Shoppers** (21 percent/\$1,108) do all their shopping at once, use a list and stick to that budget. Their top gift choice is clothing.
- **Perfect Gifters** (19 percent/\$1,056) love to shop and find inspiration from many sources. Giving unique gifts is important; they like to indulge people. They often finish holiday shopping before Thanksgiving.
- **Cyber-Shoppers** (19 percent/\$955) view holiday shopping as a chore. They avoid holiday crowds, preferring to shop online at home in their pajamas. They often don't know what they want to buy before they sit down with their computer, tablet or smartphone.
- **Last-Minute Hopefuls** (5 percent/\$955) are dashing through the mall on Christmas Eve. They think waiting until the last minute will save money, and they often buy all gifts at once. They buy gift cards.
- **Humbugs** (5 percent/\$941) are the opposite of Black Friday Warriors. They think holiday decorations appear too soon, dislike holiday crowds, don't indulge loved ones, and won't pay for convenience. They are stingy, delay until the last minute, and shun holiday sales.

2014 SAS Holiday Shopper Survey

Who's on your list? Which of the following groups are on your holiday gift list this year?	Family members under age 18	74%
	Family members 18 and over	90%
	Friends	62%
	Neighbors	18%
	Co-workers	23%
	Others	7%
	Average # of groups	2.7
Has the number of people on your holiday gift list changed since last year?	No, it's the same	54%
	Yes, it has increased	36%
	Yes, it has decreased	10%
	Total	100%
What types of holiday gifts are you likely to give the child or children in your family under 7 years old?	Apparel/Accessories	56%
	Cosmetics/Fragrance	12%
	Electronics	33%
	Food or Beverage	10%
	Gift Card	27%
	Jewelry	11%
	Money	18%
	Toys, Books or Music	87%
	Other	3%
	Average # of gift categories	2.6
What types of holiday gifts are you likely to give the children in your family 7 to 12 years old?	Apparel/Accessories	49%
	Cosmetics/Fragrance	12%
	Electronics	45%
	Food or Beverage	10%
	Gift Card	38%
	Jewelry	14%
	Money	27%
	Toys, Books or Music	69%
	Other	3%
	Average # of gift categories	2.7

What types of holiday gifts are you likely to give the children in your family 13 to 17 years old?	Apparel/Accessories	52%
	Cosmetics/Fragrance	23%
	Electronics	44%
	Food or Beverage	11%
	Gift Card	60%
	Jewelry	20%
	Money	40%
	Toys, Books or Music	27%
	Other	3%
	Average # of gift categories	2.8
What types of holiday gifts are you likely to give the adults in your family 18 to 29 years old?	Apparel/Accessories	51%
	Books or Music	29%
	Cosmetics/Fragrance	31%
	Electronics	35%
	Food or Beverage	15%
	Gift Card	64%
	Household Goods	22%
	Jewelry	23%
	Money	30%
	Other	4%
	Average # of gift categories	3.0
What types of holiday gifts are you likely to give the adults in your family 30 or older?	Apparel/Accessories	48%
	Books or Music	31%
	Cosmetics/Fragrance	28%
	Electronics	27%
	Food or Beverage	23%
	Gift Card	57%
	Household Goods	36%
	Jewelry	25%
	Money	21%
	Other	4%
	Average # of gift categories	3.0
Do you currently have a spouse, significant other or partner?	Yes	74%
	No	25%
	I'd prefer not to answer	1%
	Total	100%

What are you likely to give your spouse, significant other or partner?	Apparel/Accessories	51%
	Books or Music	20%
	Cosmetics/Fragrance	25%
	Electronics	34%
	Food or Beverage	12%
	Gift Card	24%
	Household Goods	15%
	Jewelry	32%
	Money	9%
	Other (specify)	9%
	We are not exchanging gifts this year	8%
Average # of gift categories		2.3
Do you plan to buy any of the following this holiday season as gifts or for yourself? - Smartphone	Yes	24%
	No	67%
	Not sure	9%
Total		100%
Do you plan to buy any of the following this holiday season as gifts or for yourself? - Tablet	Yes	23%
	No	63%
	Not sure	13%
Total		100%
Do you plan to buy any of the following this holiday season as gifts or for yourself? - Wearable technology	Yes	14%
	No	70%
	Not sure	16%
Total		100%
What's your holiday shopping strategy? Where do you get ideas for the gifts you give?	I ask people what they want	63%
	I browse for gift ideas at stores	56%
	I search online for gift ideas	60%
	I get ideas from others	42%
	I get ideas from the media (TV, newspaper, magazines)	26%
	Other:	6%
When do you plan to shop for holiday gifts this year?	My holiday shopping is already done	4%
	Before Thanksgiving	35%
	During the after Thanksgiving sales	52%
	During December	58%
	Right before Christmas	18%
	I don't know yet	5%
Are you planning to shop in the following ways during the Thanksgiving holiday? - At retail locations open Thanksgiving	Yes	27%
	No	61%
	Unsure	12%
	Total	100%

Are you planning to shop in the following ways during the Thanksgiving holiday? - At retail locations on Black Friday	Yes	40%
	No	46%
	Unsure	14%
	Total	100%
Are you planning to shop in the following ways during the Thanksgiving holiday? - Online Thanksgiving Day	Yes	34%
	No	51%
	Unsure	15%
	Total	100%
Are you planning to shop in the following ways during the Thanksgiving holiday? - Online on Black Friday	Yes	49%
	No	33%
	Unsure	17%
	Total	100%
Are you planning to shop in the following ways during the Thanksgiving holiday? - Online on Cyber Monday	Yes	53%
	No	27%
	Unsure	20%
	Total	100%
How do you search for information about gifts? (e.g. price, description, availability)	I generally start by searching for information about merchandise online	68%
	I generally start by going to stores to see merchandise	29%
	Other	3%
	Total	100%
Through which methods do you plan to purchase your gifts?	In-store	85%
	On-line	81%
	Over the phone	5%
	Through the mail	8%
	Other	1%
For online purchasing, do you use:	PC	59%
	Mobile device (smartphone, tablet)	10%
	Both PC and mobile device	31%
	Total	100%
Which of these do you think will be the primary method you use to purchase gifts? Please select one.	In-store	57%
	On-line	42%
	Over the phone	0%
	Through the mail	1%
	Other	0%
	Total	100%

What type of holiday shopper are you? Please indicate your level of agreement with these statements. - I like to be a part of the shopping crowds during Black Friday.	Strongly Disagree	40%
	Disagree	19%
	Neither Agree nor Disagree	17%
	Agree	17%
	Strongly Agree	8%
	Total	100%
What type of holiday shopper are you? Please indicate your level of agreement with these statements. - I like to get ahead of the holiday rush and buy gifts early.	Strongly Disagree	5%
	Disagree	12%
	Neither Agree nor Disagree	27%
	Agree	39%
	Strongly Agree	17%
	Total	100%
What type of holiday shopper are you? Please indicate your level of agreement with these statements. - I enjoy going to stores to shop for gifts.	Strongly Disagree	9%
	Disagree	12%
	Neither Agree nor Disagree	22%
	Agree	39%
	Strongly Agree	18%
	Total	100%
What type of holiday shopper are you? Please indicate your level of agreement with these statements. - Holiday shopping is a chore.	Strongly Disagree	12%
	Disagree	20%
	Neither Agree nor Disagree	26%
	Agree	29%
	Strongly Agree	13%
	Total	100%
What type of holiday shopper are you? Please indicate your level of agreement with these statements. - I like to do all of my holiday shopping at once.	Strongly Disagree	6%
	Disagree	26%
	Neither Agree nor Disagree	28%
	Agree	30%
	Strongly Agree	10%
	Total	100%
What type of holiday shopper are you? Please indicate your level of agreement with these statements. - Gift cards are too impersonal for holiday giving.	Strongly Disagree	19%
	Disagree	28%
	Neither Agree nor Disagree	25%
	Agree	19%
	Strongly Agree	9%
	Total	100%
What type of holiday shopper are you? Please indicate your level of agreement with these statements. - I spend a lot of time finding the perfect gift for each person.	Strongly Disagree	2%
	Disagree	10%
	Neither Agree nor Disagree	26%
	Agree	45%
	Strongly Agree	17%
	Total	100%

What type of holiday shopper are you? Please indicate your level of agreement with these statements. - You get the best prices if you wait until right before Christmas to shop.	Strongly Disagree	8%
	Disagree	22%
	Neither Agree nor Disagree	40%
	Agree	23%
	Strongly Agree	8%
	Total	100%
What type of holiday shopper are you? Please indicate your level of agreement with these statements. - I don't mind spending more for convenience.	Strongly Disagree	5%
	Disagree	18%
	Neither Agree nor Disagree	30%
	Agree	37%
	Strongly Agree	9%
	Total	100%
What type of holiday shopper are you? Please indicate your level of agreement with these statements. - Retailers put holiday merchandise out way too early.	Strongly Disagree	6%
	Disagree	12%
	Neither Agree nor Disagree	24%
	Agree	30%
	Strongly Agree	28%
	Total	100%
What type of holiday shopper are you? Please indicate your level of agreement with these statements. - I have a holiday budget, and I stick to it.	Strongly Disagree	5%
	Disagree	17%
	Neither Agree nor Disagree	30%
	Agree	34%
	Strongly Agree	15%
	Total	100%
What type of holiday shopper are you? Please indicate your level of agreement with these statements. - The gift doesn't really matter; it's the thought that counts.	Strongly Disagree	6%
	Disagree	18%
	Neither Agree nor Disagree	28%
	Agree	33%
	Strongly Agree	15%
	Total	100%
What type of holiday shopper are you? Please indicate your level of agreement with these statements. - I like to indulge my family and friends during the holidays.	Strongly Disagree	3%
	Disagree	7%
	Neither Agree nor Disagree	27%
	Agree	45%
	Strongly Agree	18%
	Total	100%
What type of holiday shopper are you? Please indicate your level of agreement with these statements. - I generally end up overspending during the holidays.	Strongly Disagree	6%
	Disagree	14%
	Neither Agree nor Disagree	24%
	Agree	40%
	Strongly Agree	16%
	Total	100%

What type of holiday shopper are you? Please indicate your level of agreement with these statements. - I prefer to give homemade gifts liked baked good or crafts.	Strongly Disagree	18%
	Disagree	27%
	Neither Agree nor Disagree	31%
	Agree	18%
	Strongly Agree	6%
	Total	100%
What type of holiday shopper are you? Please indicate your level of agreement with these statements. - I will spend extra time and energy to find the best price on gifts.	Strongly Disagree	4%
	Disagree	8%
	Neither Agree nor Disagree	24%
	Agree	44%
	Strongly Agree	20%
	Total	100%
What type of holiday shopper are you? Please indicate your level of agreement with these statements. - I save for the holidays during the year.	Strongly Disagree	11%
	Disagree	21%
	Neither Agree nor Disagree	25%
	Agree	31%
	Strongly Agree	13%
	Total	100%
What type of holiday shopper are you? Please indicate your level of agreement with these statements. - Holiday shopping causes me stress.	Strongly Disagree	13%
	Disagree	22%
	Neither Agree nor Disagree	26%
	Agree	26%
	Strongly Agree	12%
	Total	100%
What type of holiday shopper are you? Please indicate your level of agreement with these statements. - I typically know what I am going to buy before I go shopping.	Strongly Disagree	3%
	Disagree	12%
	Neither Agree nor Disagree	24%
	Agree	45%
	Strongly Agree	16%
	Total	100%
What's on your list? What is the one thing you hope to receive as a holiday gift this year ...	Apparel/Accessories	14%
	Books or Music	5%
	Cosmetics/Fragrance	5%
	Electronics	19%
	Food or Beverage	2%
	Gift Card	22%
	Household Goods	3%
	Jewelry	5%
	Money	13%
	Other (specify):	12%
Total	100%	

Just a few questions about you. These help us divide the surveys into groups. (We don't share.)	Smartphone	34%
	Tablet	9%
	Smartphone and tablet	41%
	Neither	16%
	Total	100%
How many hours would you say you spend on social media per week?	I do not use social media	16%
	Less than 5	31%
	5 to 10	24%
	11 to 20	15%
	More than 20	14%
	Total	100%
What gender are you?	Male	49%
	Female	51%
	Prefer not to answer	0%
	Total	100%
What is the highest level of education you have completed?	Less than High School	2%
	High School	31%
	2-year College Degree	22%
	4-year College Degree	28%
	Master's Degree	12%
	Doctoral Degree	2%
	Professional Degree (JD, MD)	3%
	Total	100%
What's your employment situation?	Employed full-time	43%
	Employed part-time	14%
	Full-time student	5%
	Not currently employed	14%
	Retired	19%
	Other	5%
	Total	100%

State of residence?	Alabama	1%
	Alaska	0%
	Arizona	3%
	Arkansas	1%
	California	10%
	Colorado	2%
	Connecticut	1%
	Delaware	0%
	District of Columbia	0%
	Florida	9%
	Georgia	4%
	Hawaii	1%
	Idaho	1%
	Illinois	6%
	Indiana	2%
	Iowa	1%
	Kansas	1%
	Kentucky	1%
	Louisiana	1%
	Maine	0%
	Maryland	2%
	Massachusetts	2%
	Michigan	3%
	Minnesota	1%
	Mississippi	1%
	Missouri	2%
	Montana	0%
	Nebraska	1%
	Nevada	1%
	New Hampshire	0%
	New Jersey	3%
	New Mexico	1%
	New York	7%
	North Carolina	3%
	North Dakota	0%
	Ohio	5%
	Oklahoma	1%
	Oregon	2%
	Pennsylvania	3%
	Puerto Rico	0%
	Rhode Island	0%

State of residence?	South Carolina	2%
	South Dakota	0%
	Tennessee	1%
	Texas	8%
	Utah	1%
	Vermont	0%
	Virginia	3%
	Washington	2%
	West Virginia	0%
	Wisconsin	1%
	Wyoming	0%
	I do not reside in the United States	0%
		Total
What is your total annual household income?	under \$50,000	45%
	\$50,000-\$99,999	33%
	\$100,000-\$149,999	14%
	\$150,000-\$199,999	5%
	\$200,000+	3%
	Total	100%