AN OLD-FASHIONED
OMNICHANNEL
Christmas

ORDER SHIPPED!

SHOPPER

INSIGHTS

REPORT

FALL 2017

FiELD AGENT®

FiELD AGENT®

INTRODUCTION

THE NEW, OLD-FASHIONED WAY

With the 2017 holiday shopping season almost upon us, companies everywhere are entertaining questions about shoppers and their holiday plans.

Some of their questions are "old."

• What gifts do shoppers plan to buy?

• Where do they plan to buy them?

Other questions are "new" in nature.

• How will shoppers use mobile apps this holiday season?

• Are they more or less likely to use in-store pickup during the holiday rush?

• What role will showrooming and webrooming play this year?

But all of these questions are important.

Field Agent's 2017 holiday report—*An Old-Fashioned, Omnichannel Christmas*—is hardly your typical shopper insight report.

It goes well beyond shopper's purchase intentions—addressing the actual ways Americans go about holiday shopping in an increasingly digital, omnichannel age.

As you'll see, the report merges the old and the new. Insights about online shopping and mobile apps are presented right alongside insights about brick-and-mortar shopping.

Encompassing 14,160 survey responses, Field Agent's 2017 holiday report is sure to be a helpful companion to brands, retailers, and agencies this holiday shopping season—and well beyond.

Thank you, and best wishes to you and your company in Q4 and 2018.
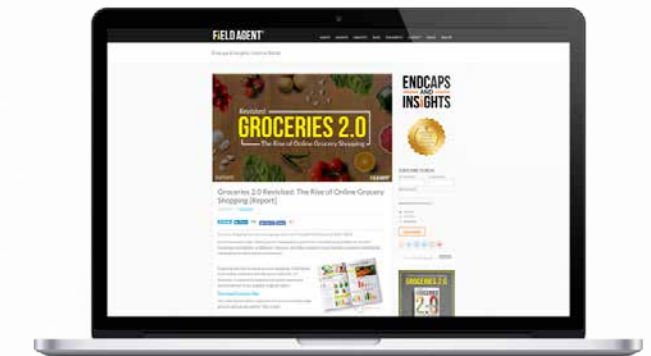
CHRIS MEDENWALD, PH.D.
EDITOR

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For demographic information, cross-reference the superscript note accompanying each sample size throughought the report with the appendix at the end of the report.

WHAT'S INSIDE?

ENDCAPS AND INSIGHTS

The Field Agent Blog, *Endcaps & Insights*, offers a steady stream of information and insights from the ever-changing world of retail.

SUBSCRIBE
FIELDAGENT.NET/SUBSCRIBE

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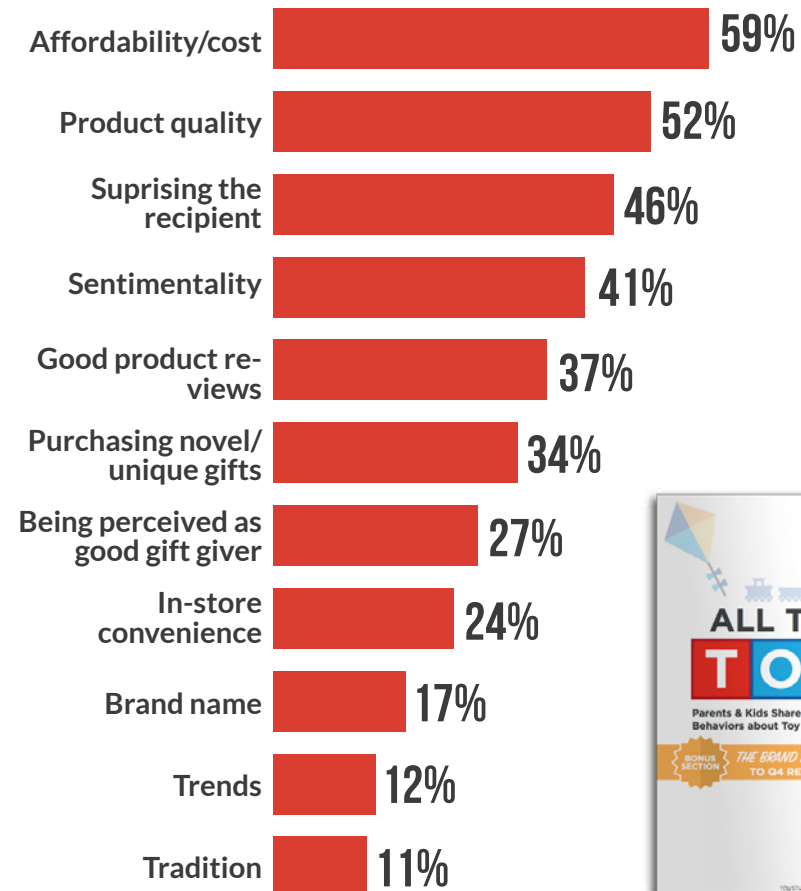PUBLIC RELATIONS
cory.nelson@fieldagent.net

HOLIDAY SHOPPING

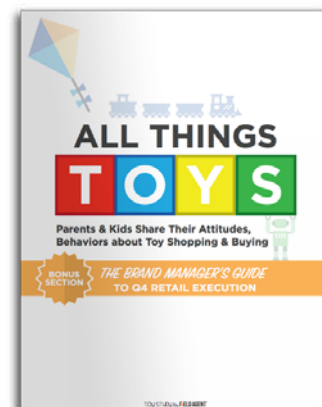Compared to last year, do you expect to spend more or less on the following items? N = 2,020 Families[6]

	Groceries	Decorations	Electronics	Toys	Gifts for Kids
More	43%	35%	50%	44%	56%
Neutral	43%	39%	31%	26%	29%
Less	14%	27%	19%	30%	14%

Which of the following are particularly important to you as you shop for and buy holiday gifts? N = 2,020 U.S. Adults[4]

- Affordability/cost — **59%**
- Product quality — **52%**
- Suprising the recipient — **46%**
- Sentimentality — **41%**
- Good product reviews — **37%**
- Purchasing novel/unique gifts — **34%**
- Being perceived as good gift giver — **27%**
- In-store convenience — **24%**
- Brand name — **17%**
- Trends — **12%**
- Tradition — **11%**

Agent Photo

ALL THINGS TOYS
Parents & Kids Share Their Attitudes, Behaviors about Toy Shopping & Buying

BONUS SECTION
THE BRAND MANAGER'S GUIDE TO Q4 RETAIL EXECUTION

Special Report:
PARENTS & KIDS TALK TOYS

DOWNLOAD THE REPORT

BRICK & MORTAR

How many stores do you expect to visit to purchase all of your holiday gifts this Christmas? N = 2,020 U.S. Adults[2]

- 0 — 1%
- 1 — 2%
- 2 — 7%
- 3 — 17%
- 4 — 12%
- 5 — 18%
- 6-10 — 33%
- 11-15 — 5%
- > 15 — 5%

70% I primarily make special store trips to purchase holiday gifts

27% I primarily pick up holiday gifts when I'm shopping for other items like groceries, clothing, etc.

3% Not applicable

N = 2,020 U.S. Adults[2]

FIELD AGENT®
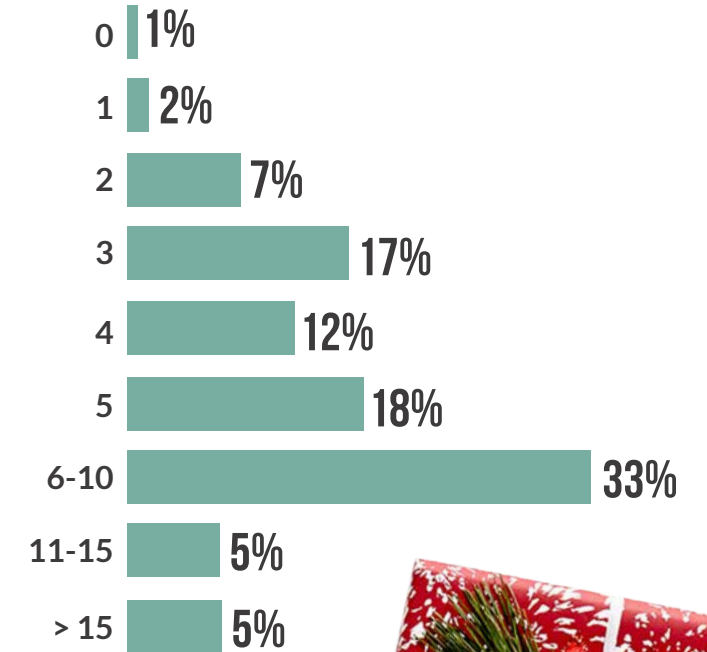
TOP RETAILERS

When purchasing holiday gifts this year, which **3 retailers** will receive most of your business? N = 2,020 U.S. Adults[2]

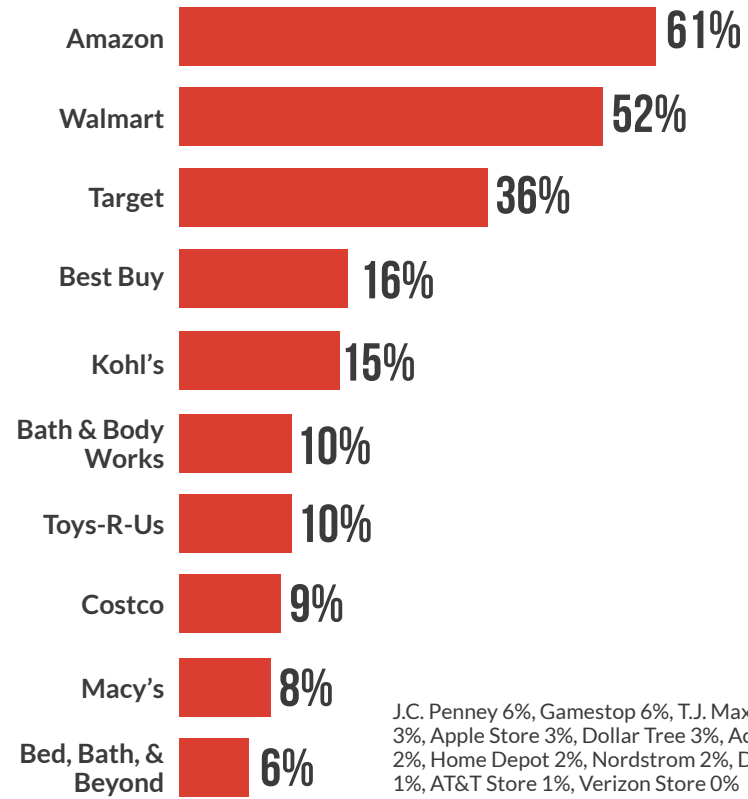| Retailer	Percentage
Amazon	61%
Walmart	52%
Target	36%
Best Buy	16%
Kohl's	15%
Bath & Body Works	10%
Toys-R-Us	10%
Costco	9%
Macy's	8%
Bed, Bath, & Beyond	6%

J.C. Penney 6%, Gamestop 6%, T.J. Maxx 6%, Sam's Club 5%, Barnes & Noble 5%, Dick's Sporting Goods 3%, Apple Store 3%, Dollar Tree 3%, Academy Sports 3%, Big Lots 3%, Gap/Old Navy 3%, Dollar General 2%, Home Depot 2%, Nordstrom 2%, Dillard's 2%, Kmart 2%, Lowe's 2%, Family Dollar 1%, Sears 1%, Belk 1%, AT&T Store 1%, Verizon Store 0%
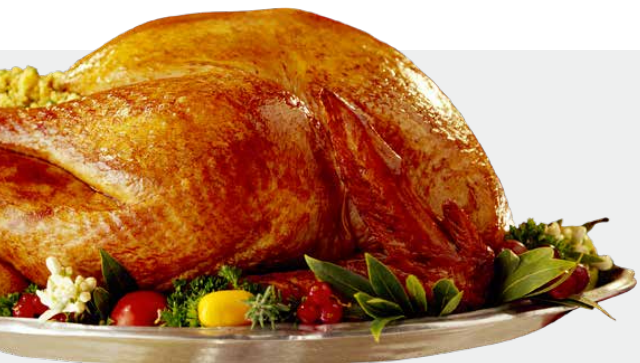
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TOP FOOD RETAILER

When purchasing foods, snacks, beverages, and ingredients for your holiday celebrations this Christmas, which **one retailer** will receive most of your business? N = 2,020 U.S. Adults[2]

Agent Photo

Walmart 38%

Kroger 13% **COSTCO WHOLESALE** 7%

Aldi 6%, Target 5%, Publix 4%, Sam's Club 4%, Meijer 3%, H-E-B Grocery 3%, Safeway 2%, Whole Foods 2%, Albertson's 2%, Hy-Vee 1%, Supervalue 0.05%

ONLINE SHOPPING

**78%** are completely or very likely to buy **gifts online** this holiday season N = 2,020 U.S. Adults[4]

66% expect to shop for gifts online **more** this holiday season than last N = 2,020 U.S. Adults[4]

64% are more likely to use **in-store pickup** when buying holiday gifts N = 2,020 U.S. Adults[3]

51% will purchase **most** of their family's gifts online N = 2,020 U.S. Adults[3]

37% are completely or very likely to engage in **showrooming** when buying gifts N = 2,020 U.S. Adults[3]

37% are completely or very likely to engage in **webrooming** when buying gifts N = 2,020 U.S. Adults[3]
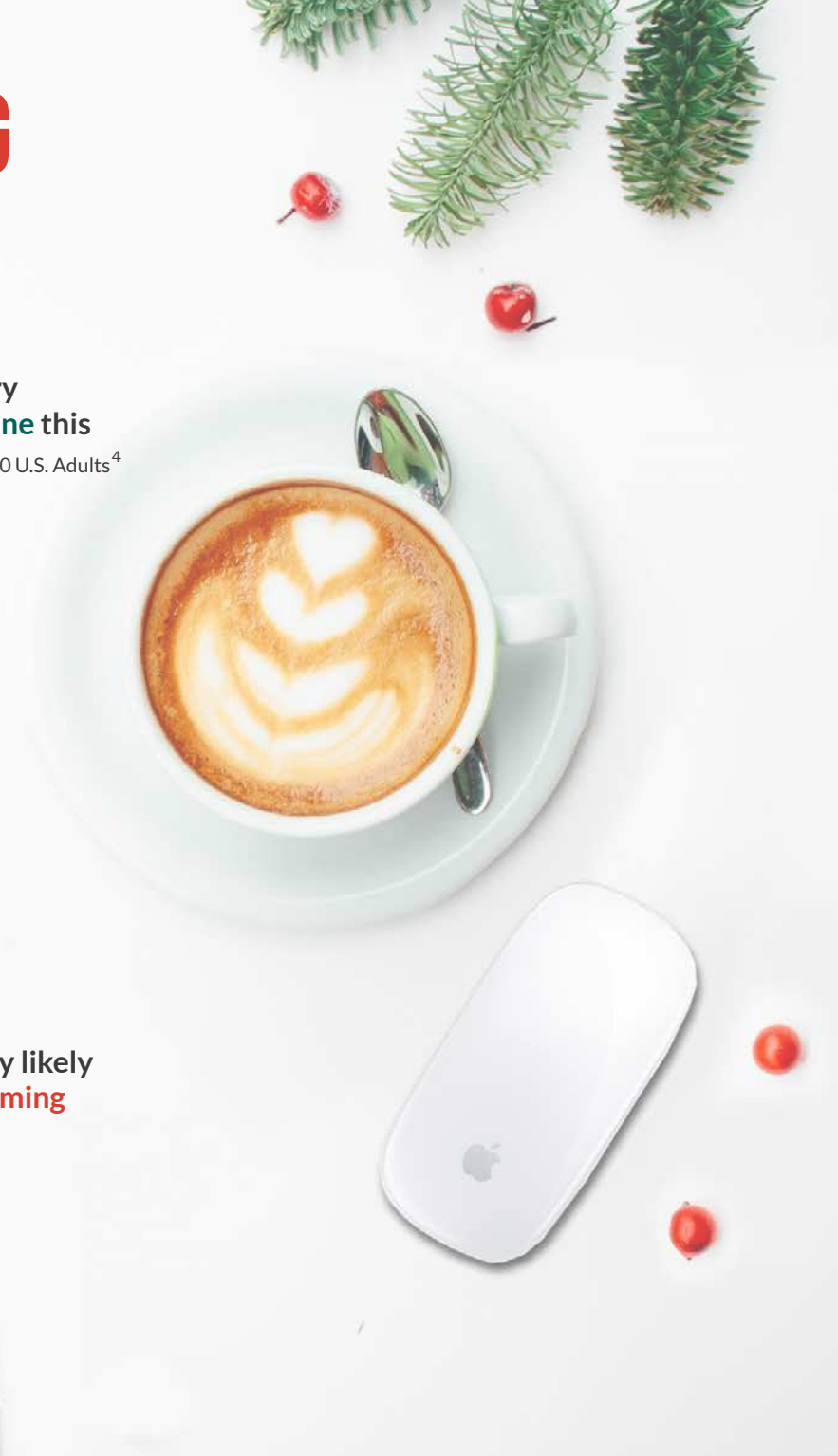
> *Usually when I shop [for gifts] online I'm targeting very specific items that are not available for in-store purchase. For example, I will buy online for a specific custom guitar which is...unavailable in stores.*
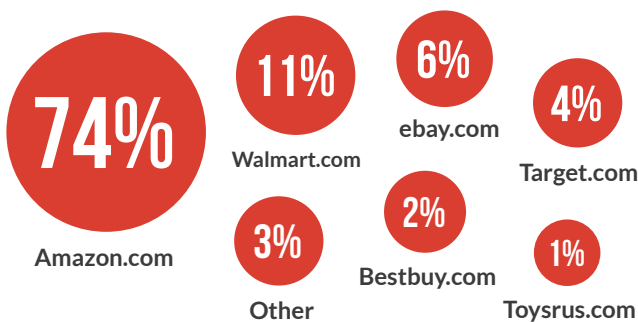>
> *- Agent Quote*

ONLINE RETAILERS & PURCHASES

TOP WEBSITES

On which **one** website will you do **most** of your gift shopping this holiday season?

N = 2,020 U.S. Adults[4]

74%
Amazon.com

11%
Walmart.com

6%
ebay.com

4%
Target.com

3%
Other

2%
Bestbuy.com

1%
Toysrus.com

66%
purchase gifts online to AVOID long lines, crowds, or "craziness" of stores

FUN FACTS

24%
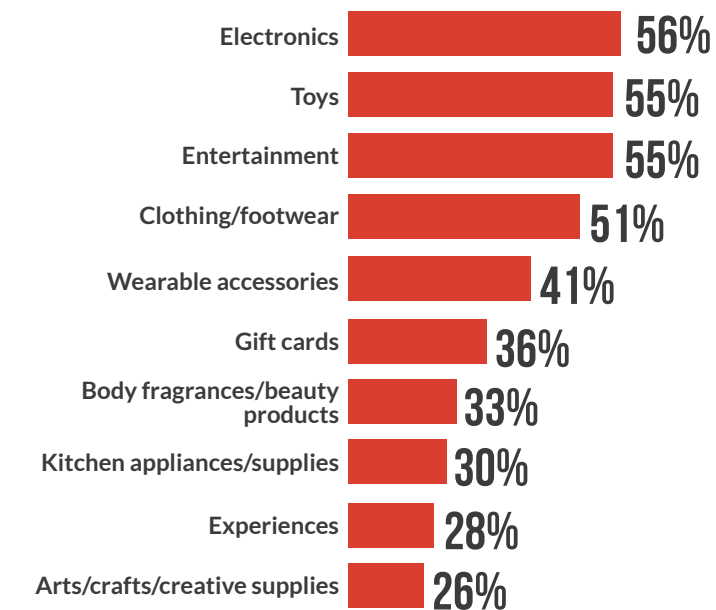of CHILDREN will buy most of their gifts for others ONLINE this year

Among those with kids 8-17 in the household
n = 797 U.S. Adults[5]

LIKELY ONLINE PURCHASES

Which of the following **gifts** are you likely to purchase **online** for the coming holiday season?

Among those at least moderately likely to shop for gifts onine this year
n = 1,937 U.S. Adults[5]

Electronics	**56%**
Toys	**55%**
Entertainment	**55%**
Clothing/footwear	**51%**
Wearable accessories	**41%**
Gift cards	**36%**
Body fragrances/beauty products	**33%**
Kitchen appliances/supplies	**30%**
Experiences	**28%**
Arts/crafts/creative supplies	**26%**

Among those at least moderately likely to purchase gifts online
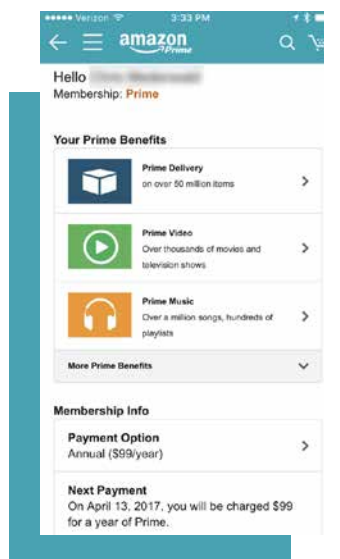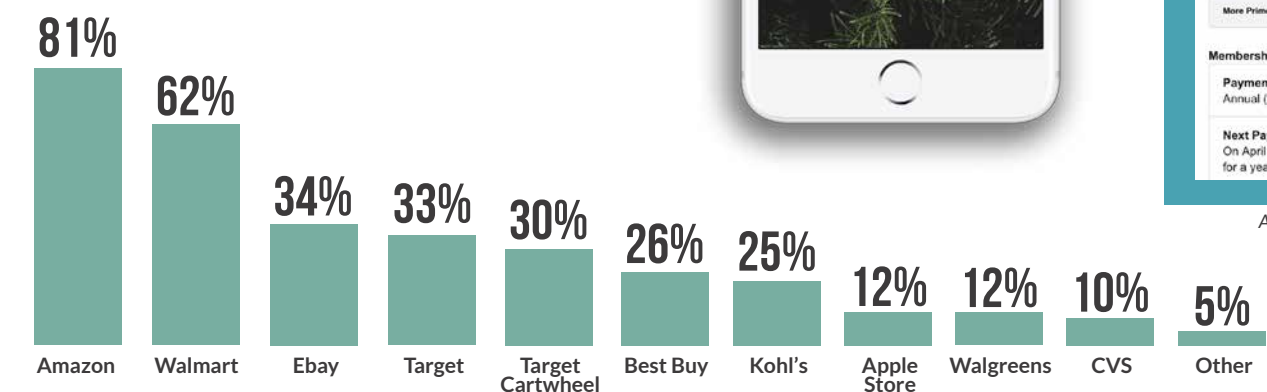n = 1,937 U.S. Adults[5]

Pet gifts/supplies 23%, Tools 20%, Sports Equipment 19%, Collectible items 17%, Camping/outdoor equipment 14%, Bikes/scooters 11%, Charitable gifts 9%, Hunting equipment 8%, Furniture 7%

MOBILE APPS

Which retailer-specific **mobile apps** do you expect to use to plan for, shop for, and/or buy **gifts** this holiday season?
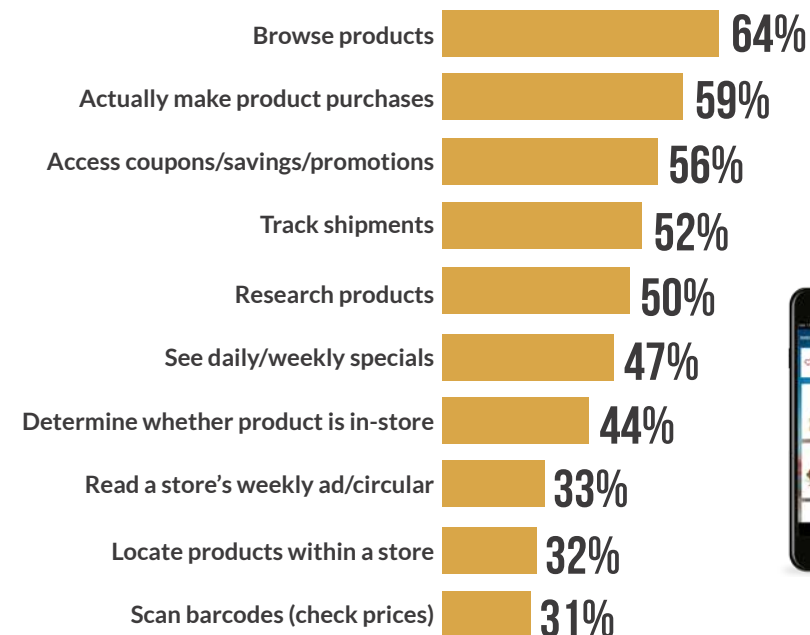
Among those at least moderately likely to use retailer-specific apps this holiday season
n = 1,608 U.S. Adults[5]

Amazon	81%
Walmart	62%
Ebay	34%
Target	33%
Target Cartwheel	30%
Best Buy	26%
Kohl's	25%
Apple Store	12%
Walgreens	12%
CVS	10%
Other	5%

Agent Mobile App Screenshot

How specifically do you plan to use retailer-specific **mobile apps** this holiday season?

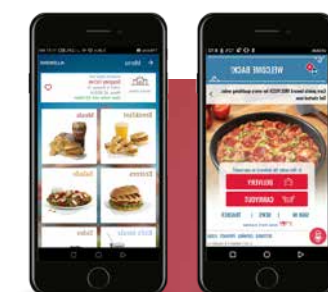*Among those at least moderately likely to use retailer-specific apps this holiday season*
n = 1,608 U.S. Adults[5]

Browse products	**64%**
Actually make product purchases	**59%**
Access coupons/savings/promotions	**56%**
Track shipments	**52%**
Research products	**50%**
See daily/weekly specials	**47%**
Determine whether product is in-store	**44%**
Read a store's weekly ad/circular	**33%**
Locate products within a store	**32%**
Scan barcodes (check prices)	**31%**

Check basic info like store hours 30%, Create/maintain shopping lists 22%, Keep track of purchases/spending 20%, Pay for purchases inside stores 19%, Interact with customer support 6%

70%
are more likely to use retailer-specific mobile apps during the holidays, compared to the rest of the year

N = 2,018 U.S. Adults[3]

FASTER FAST FOOD?

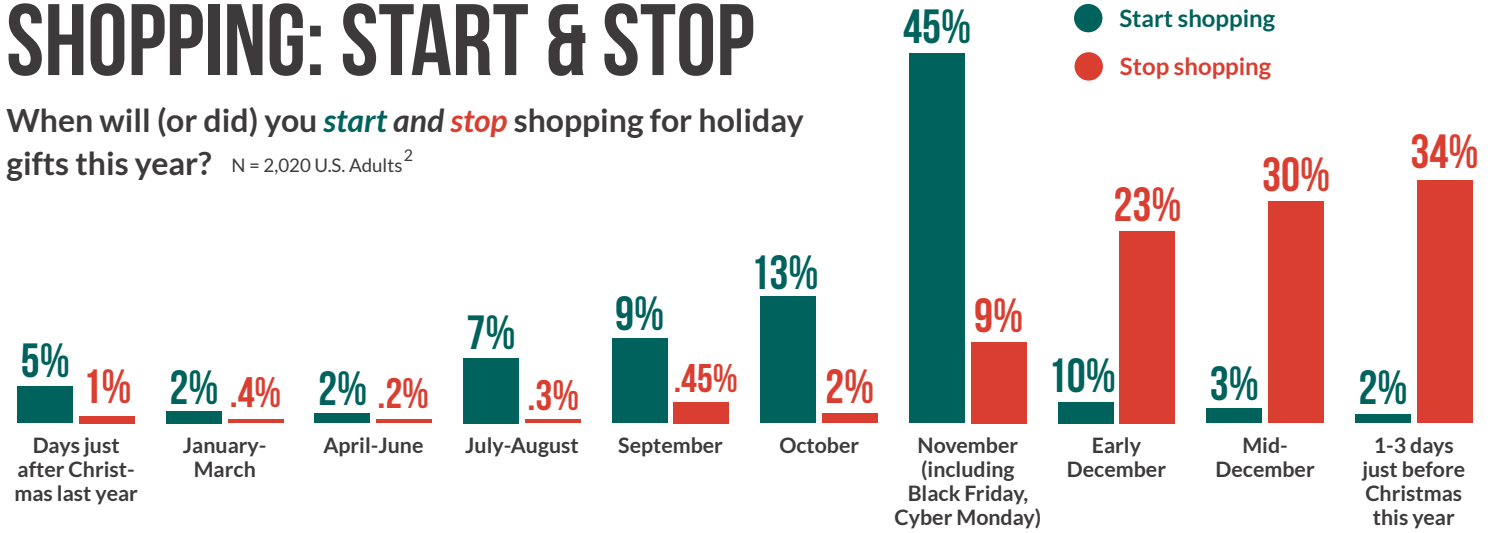Want insights into fast food, mobile app users?

CLICK TO LEARN MORE

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22% of those surveyed describe themselves as all-year shoppers

27% see themselves as Black Friday/ Cyber Monday shoppers

SHOPPING: START & STOP

When will (or did) you *start* and *stop* shopping for holiday gifts this year? N = 2,020 U.S. Adults[2]

- ● Start shopping
- ● Stop shopping

	Start	Stop
Days just after Christmas last year	5%	1%
January–March	2%	.4%
April–June	2%	.2%
July–August	7%	.3%
September	9%	.45%
October	13%	2%
November (including Black Friday, Cyber Monday)	45%	9%
Early December	10%	23%
Mid-December	3%	30%
1-3 days just before Christmas this year	2%	34%

23% of those surveyed describe themselves as early-December shoppers

6% are self-proclaimed "last-minute shoppers"

N = 2,020 U.S. Adults[4]

Agent Photos

FOR THE BETTER 1/2

SPENDING

How much approximately do you expect to spend on your spouse (in dollars) for Christmas gifts?

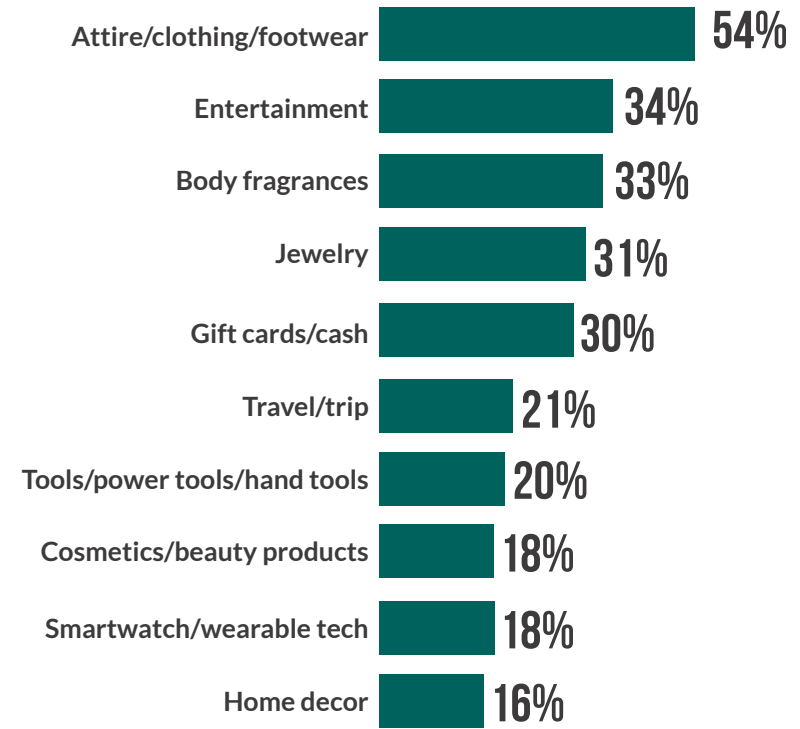**$295** MEAN

$200 MEDIAN

$100 MODE

Among married respondents who plan to purchase their spouse a gift

n = 1,057 U.S. Adults[1]

"SURPRISE, HONEY!"

As you look ahead to purchasing gifts for your spouse this Christmas, which of the following do you expect to *seriously consider* as gift options?

Among married respondents who plan to purchase their spouse a gift
n = 1,057 U.S. Adults[1]

Attire/clothing/footwear	54%
Entertainment	34%
Body fragrances	33%
Jewelry	31%
Gift cards/cash	30%
Travel/trip	21%
Tools/power tools/hand tools	20%
Cosmetics/beauty products	18%
Smartwatch/wearable tech	18%
Home decor	16%

Smart wifi-enabled home appliances 15%, Computer 14%, Firearms/hunting equipment 13%, Outdoor grill/ equipment 13%, Music 13%, Smartphone 12%, Home appliances 9%, Camping/outdoor equipment 9%, TV 8%, Furniture 8%, Camera 7%, Automobile 4%, Pet/pet supplies 3%, None of the above 3%, Charitable gifts 3%, GPS navigator 3%
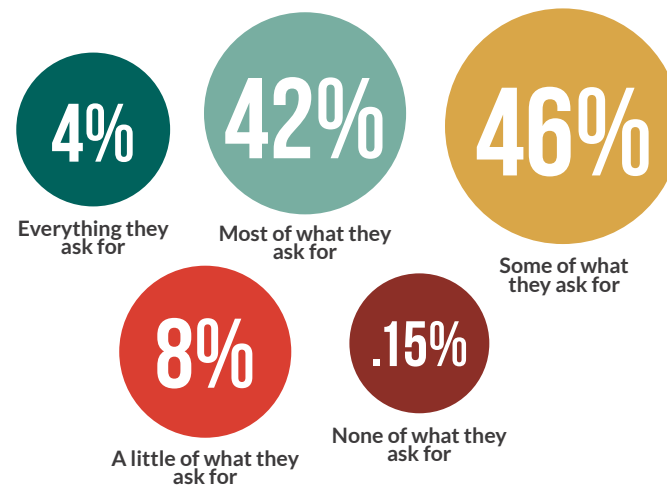

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FOR THE KIDS

SPENDING ON CHILDREN

How much approximately do you expect to **spend** per child (in dollars) for gifts this holiday season?
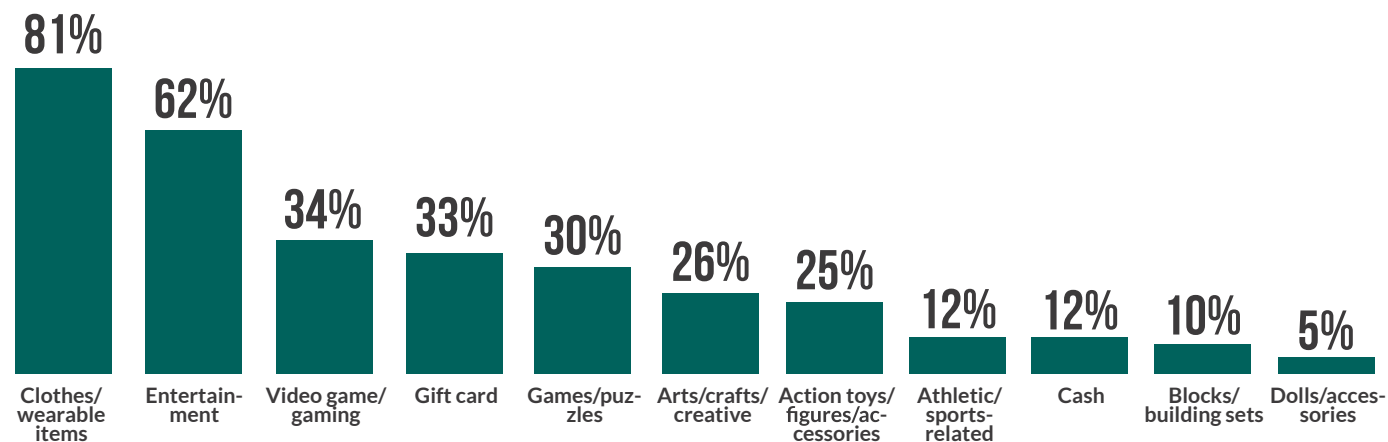
N = 2,020 U.S. Families [6]

$255 MEAN

$200 MEDIAN

$200 MODE

MEETING WISHES?

Of the gifts they will ask/wish for this year, how much will your **child/children** receive? N = 2,021 U.S. Families [7]

4% Everything they ask for

42% Most of what they ask for

46% Some of what they ask for

8% A little of what they ask for

.15% None of what they ask for

GIFTS GALORE

Looking ahead, which of the following gifts are your **children** likely to receive for Christmas this year?

N = 2,021 U.S. Families [7]

- 81% Clothes/wearable items
- 62% Entertainment
- 34% Video game/gaming
- 33% Gift card
- 30% Games/puzzles
- 26% Arts/crafts/creative
- 25% Action toys/figures/accessories
- 12% Athletic/sports-related
- 12% Cash
- 10% Blocks/building sets
- 5% Dolls/accessories

Fragrance/body scents 32%, Computing 32%, Bikes/scooters 25%, Audio/music 25%, Remote control 23%, Mobile devices 22%, Musical instrument/toys 21%, Outdoor play 19%, Collectible items 15%, Indoor playset 15%, Cameras 11%, Pets 8%, Furniture 6%

WHAT WOMEN WANT FOR CHRISTMAS

> " I have been wanting a black pair of women's Asics Cumulus 19 running shoes. I hope Santa reads this. *- Agent Quote*

WISHLIST

Below are the top 10 general wishes among adult *women*   n = 1,009 U.S. Women [3]

1.	CLOTHING/SHOES	6.	SMARTPHONE
2.	VACATION/TRIPS	7.	SMARTWATCH
3.	KITCHENWARE	8.	HANDBAG
4.	MONEY/GIFT CARDS	9.	VEHICLE
5.	LAPTOP	10.	CAMERA

TOP SPECIFIC WISHES:

1. Macbook Pro Laptop
2. Apple Watch
3. KitchenAid Mixer
4. Samsung Galaxy S8
5. iPad

MEN
WANT FOR
CHRISTMAS

"A big screen smart TV. I don't care what brand as long as it's smart and 45 inches or bigger. I will be so happy. - Agent Quote

GIFT CARDS: PLASTIC JOY?

WISHLIST

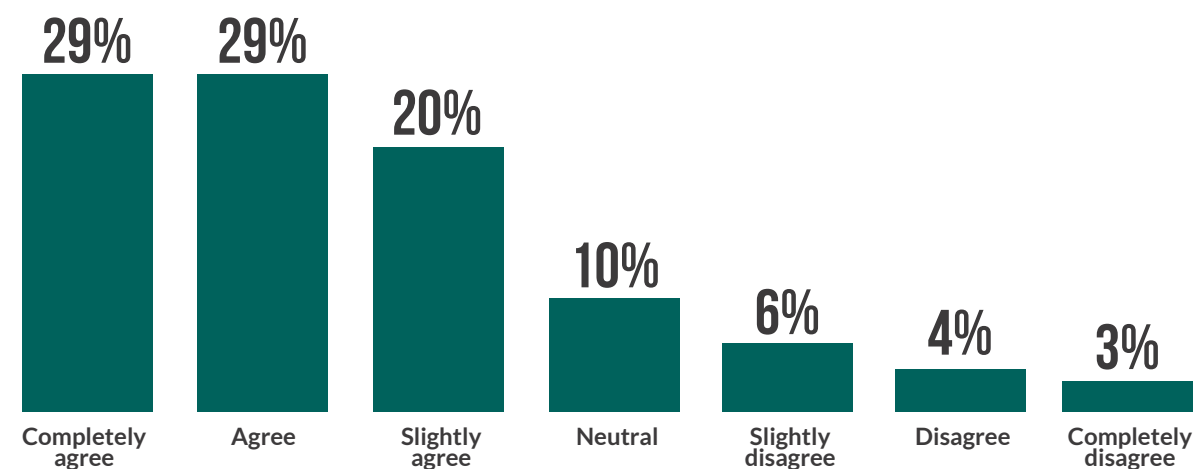**Below are the top 10 general wishes among adult men**   n = 1,009 U.S. Men [3]

1.	SMARTPHONE	6.	TV
2.	MONEY/GIFT CARDS	7.	FIREARM/ACCESSORIES
3.	VEHICLE	8.	SPEAKERS
4.	LAPTOP	9.	SMARTWATCH
5.	VIDEO GAME CONSOLES	10.	SPORTS TICKETS

TOP SPECIFIC WISHES:

1. Xbox One
2. iPhone X
3. PlayStation 4
4. Amazon Gift Card
5. Apple Watch

To what extent do you agree with the statement "I believe gift cards make good Christmas gifts"?   N = 2,020 U.S. Adults [1]

- 29% Completely agree
- 29% Agree
- 20% Slightly agree
- 10% Neutral
- 6% Slightly disagree
- 4% Disagree
- 3% Completely disagree

WHAT'S THE PROBLEM?

Primarily why don't you think gift cards make good Christmas gifts?

Among those who say gift cards don't make good gifts
n = 246 U.S. Adults [1]

62% say gift cards lack creativity and thought
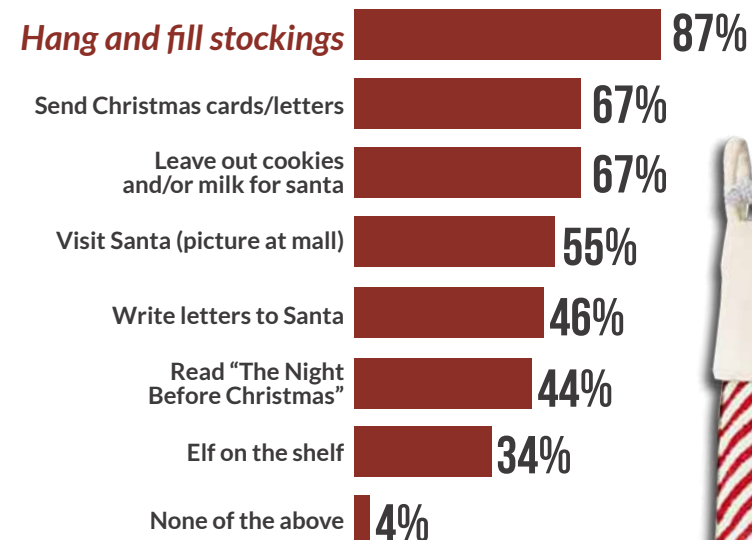
61% say gift cards are cold and impersonal

HANG AND FILL STOCKINGS

ACTIVITIES

Which of the following Christmastime activities will your family participate in this holiday season?
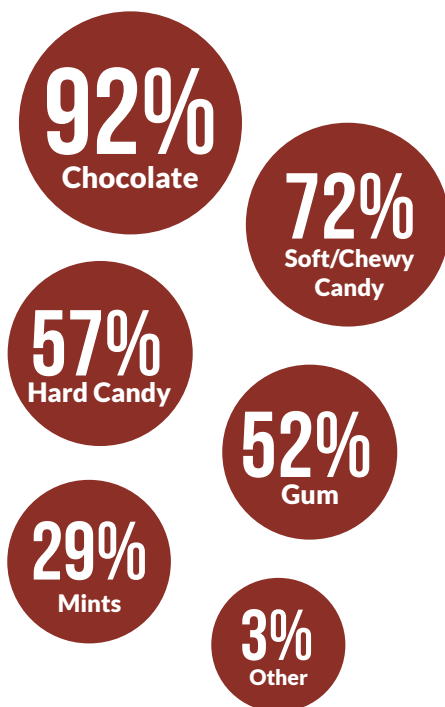
N = 2,020 U.S. Adults[7]

Activity	%
Hang and fill stockings	87%
Send Christmas cards/letters	67%
Leave out cookies and/or milk for santa	67%
Visit Santa (picture at mall)	55%
Write letters to Santa	46%
Read "The Night Before Christmas"	44%
Elf on the shelf	34%
None of the above	4%

STUFFERS

What will you likely put in your children's stockings this Christmas?

Among those households that hand and fill stockings

n = 1,763 U.S. Adults[7]
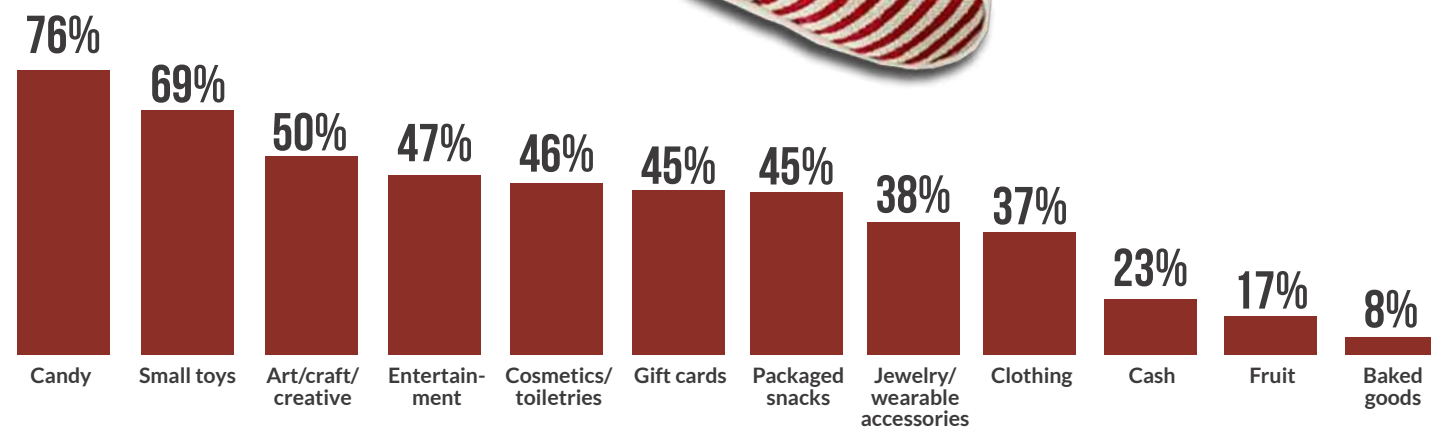
Item	%
Candy	76%
Small toys	69%
Art/craft/creative	50%
Entertainment	47%
Cosmetics/toiletries	46%
Gift cards	45%
Packaged snacks	45%
Jewelry/wearable accessories	38%
Clothing	37%
Cash	23%
Fruit	17%
Baked goods	8%

CANDY STUFFERS

What candy are you likely to include in your children's stockings this holiday season?

Among those households that hand and fill stocking
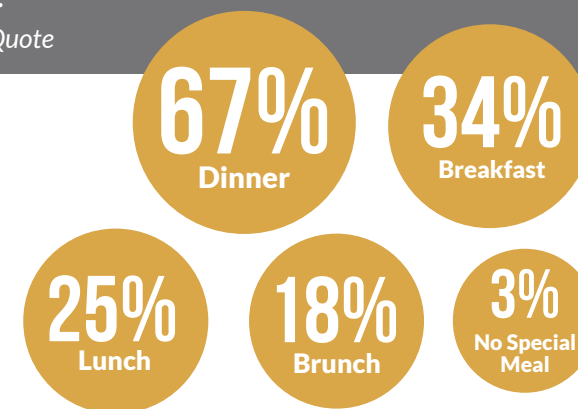
n = 1,763 U.S. Adults[7]

- **92%** Chocolate
- **72%** Soft/Chewy Candy
- **57%** Hard Candy
- **52%** Gum
- **29%** Mints
- **3%** Other

HOLIDAY FOOD & DRINK

SPECIAL MEALS

Which of the following does your household serve as a special holiday meal on Christmas Day?

n = 1,763 U.S. Adults[6]

- **67%** Dinner
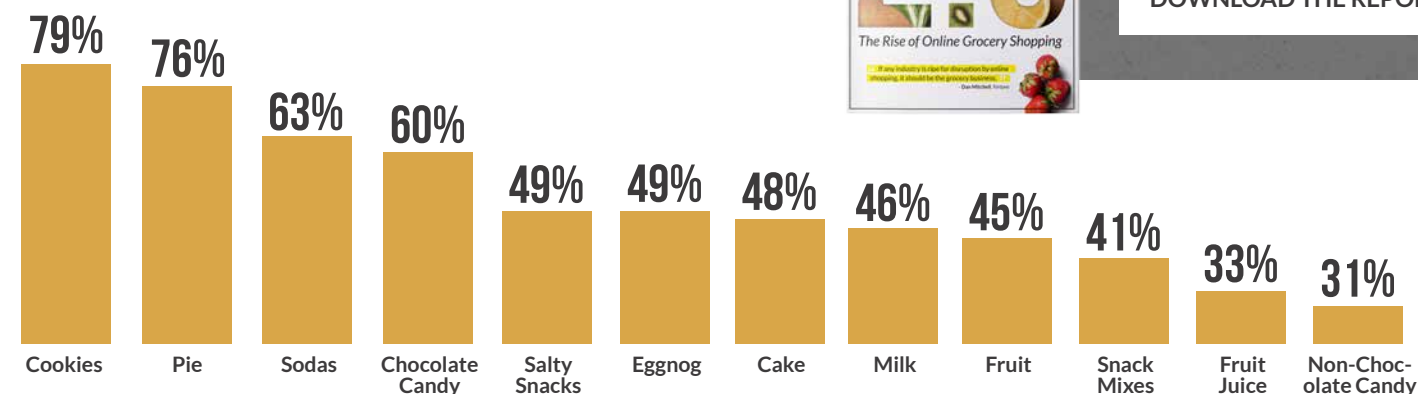- **34%** Breakfast
- **25%** Lunch
- **18%** Brunch
- **3%** No Special Meal

GETTING SERVED

Which of the following does your household serve on Christmas Even and/or Day?

n = 1,763 U.S. Adults[6]

Item	%
Cookies	79%
Pie	76%
Sodas	63%
Chocolate Candy	60%
Salty Snacks	49%
Eggnog	49%
Cake	48%
Milk	46%
Fruit	45%
Snack Mixes	41%
Fruit Juice	33%
Non-Chocolate Candy	31%

GROCERIES 2.0 REVISITED
The Rise of Online Grocery Shopping

The Rise of Online Grocery Shopping

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37% are at least moderately likely to purchase TAKEOUT from FAST FOOD restaurants to enhance holiday celebrations this year
n = 1,763 U.S. Adults[6]

38% are at least moderately likely to purchase TAKEOUT from FAST CASUAL/CASUAL DINING restaurants to enhance holiday celebrations this year
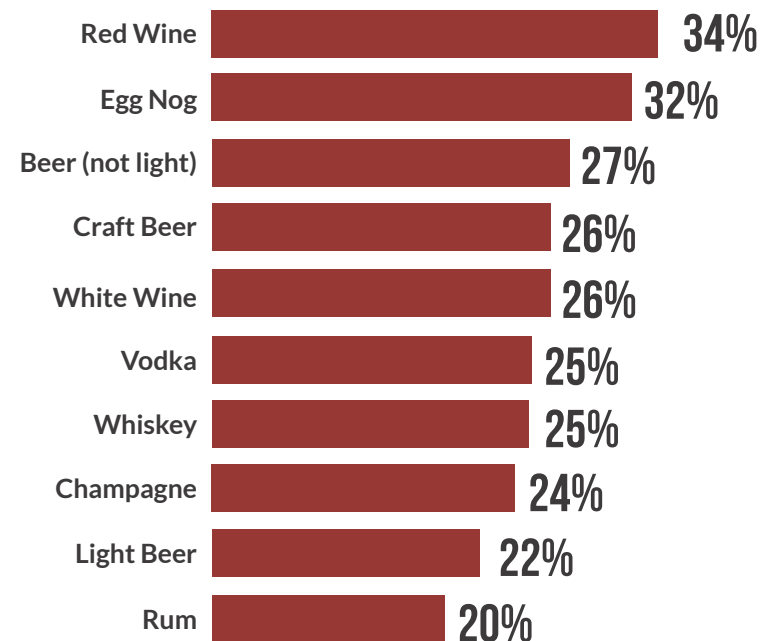n = 1,763 U.S. Adults[6]

ALCOHOL CONSUMPTION

What is the likelihood you will consume alcoholic beverages on Christmas Eve and/or Christmas Day? n = 1,360 U.S. Adults[3]

- 33% Completely likely
- 18% Very likely
- 17% Moderately likely
- 14% Not very likely
- 19% Not at all likely
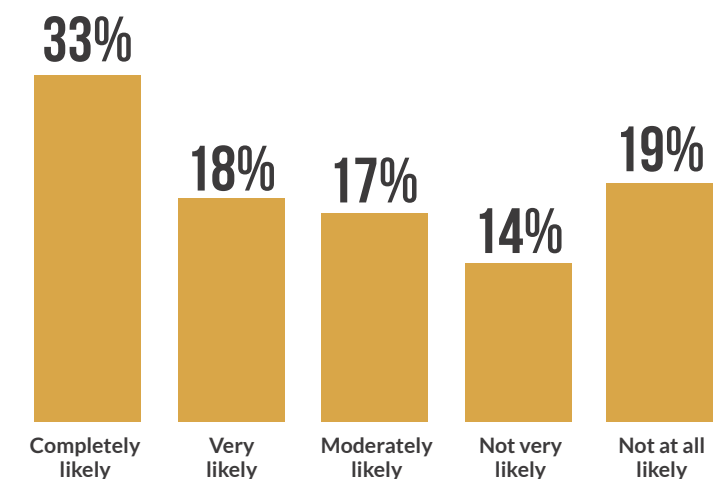
Agent Photo

Which alcoholic beverages do you expect to consume on Christmas Eve and/or Day?

Among those at least moderately likely to consume alcohol on Christmas Eve/Day
n = 1,360 U.S. Adults[3]

- Red Wine 34%
- Egg Nog 32%
- Beer (not light) 27%
- Craft Beer 26%
- White Wine 26%
- Vodka 25%
- Whiskey 25%
- Champagne 24%
- Light Beer 22%
- Rum 20%

Tequila 13%, Malt Beverages 12%, Rose Wine 12%, Wine Coolers 10%, Champagne Mixers 10%, Brandy/Cognac 9%, Ginger Beer 6%, Gin 6%, Other* 4%

Hard cider was the most common write-in

PET GIFTS

How likely are you to purchase at least one holiday gift for your pet this Christmas?

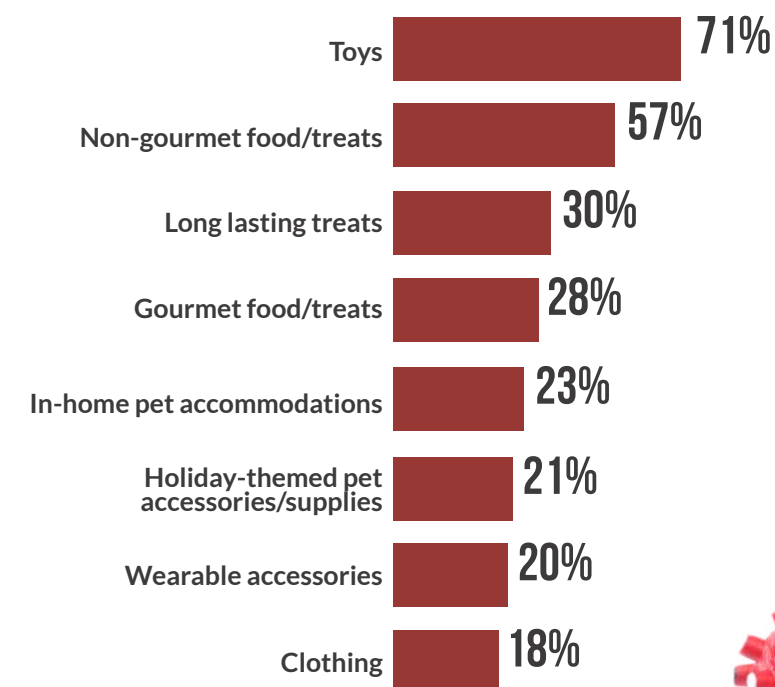*Among pet owners in the survey* n = 1,540 U.S. Adults[1]

- 44% Completely likely
- 24% Very likely
- 12% Moderately likely
- 7% Not very likely
- 12% Not at all likely
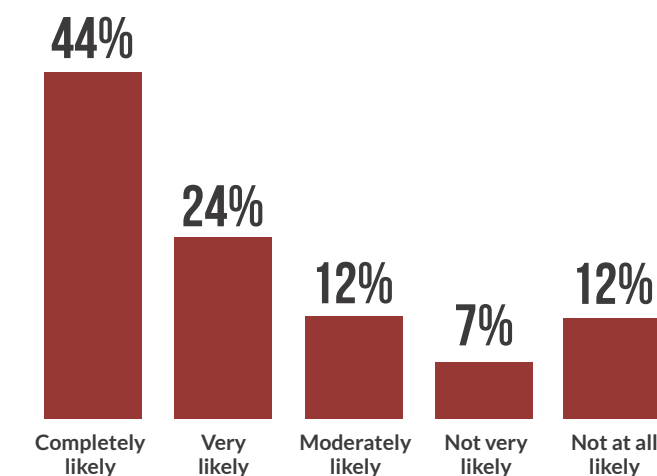
Agent Photo

HOLIDAY TREATS

What gift do you plan on purchasing for your pet this Christmas?

Among pet owners at least moderately likely to purchase a gift for one or more pets
n = 1,248 U.S. Adults[1]

- Toys 71%
- Non-gourmet food/treats 57%
- Long lasting treats 30%
- Gourmet food/treats 28%
- In-home pet accommodations 23%
- Holiday-themed pet accessories/supplies 21%
- Wearable accessories 20%
- Clothing 18%

Grooming equipment 9%, Services 7%, None of the above 1%, Other 1%

SHOPPING FRUSTRATIONS

On a scale from 0-10, how frustrating are the following?

N = 2,020 U.S. Adults [4]

Extremely frustrating

10
9
8
7
6
5
4
3
2
1
0

Not at all frustrating

7.9	7.8	7.6	6.9	5.6
Crowds/long lines	Out of stocks	Behavior of other shoppers	Insufficient parking	Customer service during the holidays

BABY IT'S COLD OUTSIDE...
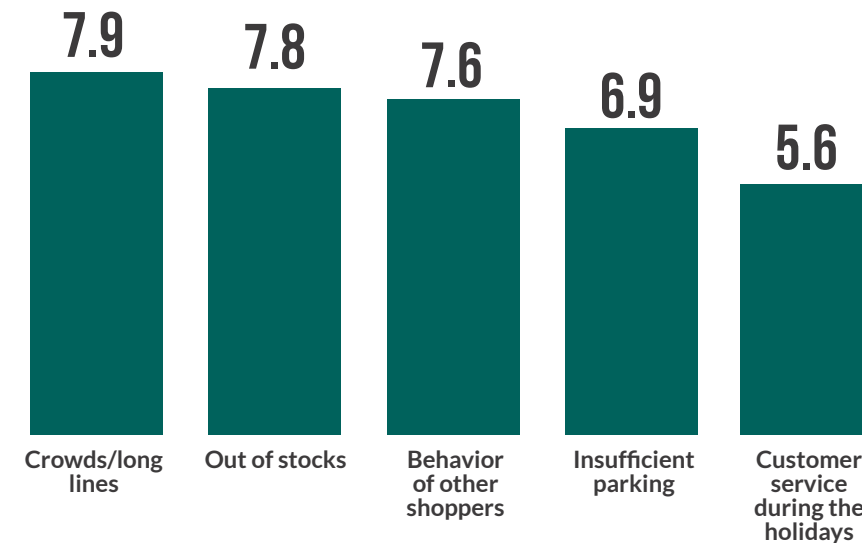
SPEAK YOUR MIND

What's most frustrating about holiday shopping?

❝ *Overcrowded stores and under-trained customer service agents create a terrible shopping environment*
— Agent Quote

❝ *The items run out fast! Within minutes [of stocking] the product is gone, even for little gifts...*
— Agent Quote

❝ *All the hype in the advertising industry that stirs everyone to near-panic...*
— Agent Quote

DEMOS

SURVEY 1   Sample: 2,020

Gender:
| 50% Male | 50% Female |

Age:
18-24: 6%
15-34: 29%
35-44: 34%
45-54: 20%
55+: 11%

Household Income:
Under $35,000: 22%
$35,000 - 39,999: 10%
$40,000 - $49,999: 12%
$50,000 - $64,999: 17%
$65,000 - 75,000: 10%
Above $75,000: 29%

SURVEY 2   Sample: 2,020

Gender:
| 50% Male | 50% Female |

Age:
18-24: 6%
15-34: 29%
35-44: 33%
45-54: 21%
55+: 10%

Household Income:
Under $35,000: 21%
$35,000 - 39,999: 11%
$40,000 - $49,999: 12%
$50,000 - $64,999: 17%
$65,000 - 75,000: 10%
Above $75,000: 29%

SURVEY 3   Sample: 2,018

Gender:
| 50% Male | 50% Female |

Age:
18-24: 6%
15-34: 30%
35-44: 33%
45-54: 21%
55+: 10%

Household Income:
Under $35,000: 23%
$35,000 - 39,999: 9%
$40,000 - $49,999: 12%
$50,000 - $64,999: 17%
$65,000 - 75,000: 10%
Above $75,000: 29%

SURVEY 4   Sample: 2,020

Gender:
| 50% Male | 50% Female |

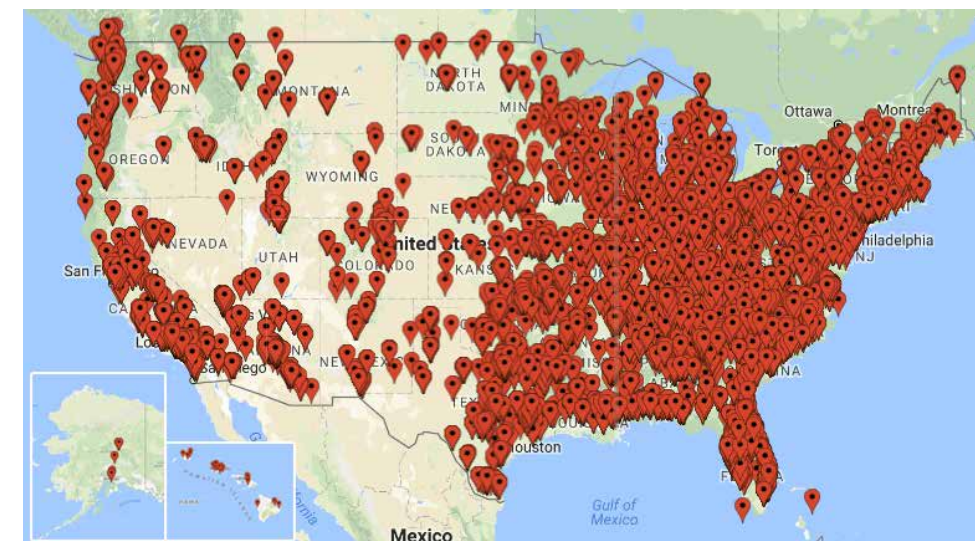Age:
18-24: 6%
15-34: 30%
35-44: 33%
45-54: 21%
55+: 11%

Household Income:
Under $35,000: 22%
$35,000 - 39,999: 10%
$40,000 - $49,999: 12%
$50,000 - $64,999: 18%
$65,000 - 75,000: 10%
Above $75,000: 28%

SURVEY 5   Sample: 2,041

Gender:
| 50% Male | 50% Female |

Age:
18-24: 7%
15-34: 27%
35-44: 33%
45-54: 21%
55+: 12%

Household Income:
Under $35,000: 22%
$35,000 - 39,999: 10%
$40,000 - $49,999: 11%
$50,000 - $64,999: 17%
$65,000 - 75,000: 10%
Above $75,000: 30%

SURVEY 6   Sample: 2,020

Gender:
| 27% M | 73% Female |

Age:
18-24: 4%
15-34: 28%
35-44: 44%
45-54: 20%
55+: 4%

Household Income:
Under $35,000: 21%
$35,000 - 39,999: 8%
$40,000 - $49,999: 11%
$50,000 - $64,999: 17%
$65,000 - 75,000: 11%
Above $75,000: 32%

All respondents currently have children ages 5-17 in the household

SURVEY 7   Sample: 2,021

Gender:
| 27% M | 73% Female |

Age:
18-24: 3%
15-34: 27%
35-44: 44%
45-54: 22%
55+: 4%

Household Income:
Under $35,000: 20%
$35,000 - 39,999: 10%
$40,000 - $49,999: 11%
$50,000 - $64,999: 17%
$65,000 - 75,000: 11%
Above $75,000: 30%

All respondents currently have children ages 5-17 in the household

SURVEY LOCATIONS

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