Simon Holiday PR Study

Final Report

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Prepared by:

Introduction and Methodology

The purpose of this study was to evaluate holiday shopping behavior and perceptions for the 2014 holiday season, with a specific focus on beliefs and planned usage of malls.

Specific research objectives were to:

- Measure attitudes toward holiday shopping and shopping specifically at malls

- Determine most popular shopping days and usage of traditional and online shopping on these days

- Identify store types and method of shopping at these stores during the holidays

- Identify most popular gift categories

- Evaluate most wanted holiday gift categories

- Measure children's holiday wants and usage of wish lists

- Determine support of social and charitable causes during the holidays

- Evaluate similarities and differences between key demographic segments

To meet those objectives, Russell Research, an independent survey research firm, conducted online interviews with 1,048 respondents. In order to qualify for study inclusion, respondents were screened to meet the following criteria:

- 50% Female, 50% Male

- Ages 18 or older

- Purchase holiday gifts for 1 or more people

- National Representation

Interviews were conducted online from September 18 – 25, 2014.

Findings for the total sample are projectable to the universe of online adults. At a 95 percent confidence level, a margin of sample error of +/- 3.0 percent applies to the sample.

Statistical Notation

The statistical significance of a result in this survey is the probability that the observed relationship (e.g., between variables) or a difference (e.g., between means) in a sample occurred by pure chance, and that in the population from which the sample was drawn, no such relationship or differences exist. Using less technical terms, one could say that the statistical significance of a result tells us something about the degree to which the result is "true". More technically, the value of the p-value represents a decreasing index of the reliability of a result. The higher the p-value, the less we can believe that the observed relation between variables in the sample is a reliable indicator of the relation between the respective variables in the population. Specifically, the p-value represents the probability of error that is involved in accepting our observed result as valid, that is, as "representative of the population." For example, a p-value of .05 (i.e.,1/20) indicates that there is a 5% probability that the relation between the variables found in our sample is a "fluke."

The following statistical notations are used throughout the report:

=   Indicates figure is significantly higher than other sub-group at a 95% confidence level (i.e. p-value of .05 or less).

Gender	Generation	Parent of Children in Household
M = Male	M = Millenial	P = Parent
F = Female	G = Gen X	N = Non-Parent
	B = Baby Boomer	
	S = Senior	

Executive Summary

Overall, the survey findings indicate that most holiday shoppers will visit a traditional shopping mall this holiday season. Most shoppers believe malls satisfy many of the needs which are important to them during the holidays.

<u>Holiday Shopping Attitudes</u>

Malls deliver on many attributes which are important to holiday shoppers.

- Nine in ten holiday shoppers (91%) agree that <u>convenience</u> is important to them when holiday shopping.

    - More than four-fifths of holiday shoppers (86%) agree malls allow them to get a lot of shopping done in a single place.

    - More than four-fifths of holiday shoppers (85%) agree malls provide the variety of retail options they need when shopping for several different people.

    - More than four-fifths of holiday shoppers (84%) agree malls are a convenient option to get a lot of holiday shopping done in one trip.

- Nearly nine in ten holiday shoppers (87%) sometimes <u>need to browse stores for holiday gift ideas</u> and four-fifths of holiday shoppers (79%) <u>spend time browsing to find the "big" gifts</u> they purchase during the holidays.

    - More than four-fifths of holiday shoppers (84%) agree malls provide them with ideas for holiday gifts.

    - Nearly nine in ten holiday shoppers (87%) agree malls often have the latest and hottest fashions and styles of the season.

    - More than four-fifths of holiday shoppers (85%) agree malls have stores where they can find special or unique gifts.

    - More than three-quarters of holiday shoppers (77%) agree they often find the holiday season's "hot items" at the mall.

- Four-fifths of holiday shoppers (81%) sometimes like to <u>"take a break" and eat/drink during holiday shopping trips</u>.

    - Four-fifths of holiday shoppers (80%) sometimes get something to eat or drink while holiday shopping at the mall.

- Three-quarters of holiday shoppers (74%) sometimes <u>find it easier to shop in stores to avoid the risk of gifts not being delivered on time</u>.

    - Nearly four-fifths of holiday shoppers (78%) agree malls area great place for last-minute holiday shopping.

Malls are a place for shoppers to get in the holiday spirit.

- Four-fifths of holiday shoppers (81%) agree the decorations in malls and stores gets them in the holiday spirit.

- Nearly nine in ten holiday shoppers (88%) agree malls are a great place to see holiday décor.

- Seven in ten parents (70%) would like to have their children take their picture with Santa at the mall this holiday season.

Holiday Shopping Attitudes (Cont'd.)

Malls are also widely viewed as a great place to find deals during the holidays.

- Nearly four-fifths of holiday shoppers (78%) agree malls are a great place for deals during the holiday season.

- Four-fifths of holiday shoppers (80%) agree malls are a great place for deals on the day after Christmas.

- Seven in ten holiday shoppers (70%) agree malls are a great place for deals on "Black Friday".

- Seven in ten holiday shoppers (69%) agree malls are a great place for deals on Christmas Eve.

Technology figures to play an important role in shopping this year, especially among younger adults. Mall tenants with an online presence can benefit this holiday season from "showrooming" between their physical and digital sites.

- One-half of holiday shoppers (51%) plan to use their mobile device while holiday shopping to compare prices, including seven in ten Millennials (70%) and three-fifths of Generation X (59%).

- More than one-half of holiday shoppers (53%) like stores or malls that have apps which can make shopping easier, including more than seven in ten Millennials (72%) and three-fifths of Generation X (60%).

- Two-thirds of holiday shoppers (67%), including three-quarters of Millennials (76%) and more than seven in ten from Generation X (72%), indicate they have purchased a gift at a store's mall location after browsing their website.

Social/Charitable Causes & Holiday Shopping

Most shoppers actively support charitable or social causes during the holidays. Malls are viewed having a positive impact on the community during this time of year.

- More than two-thirds of holiday shoppers (68%) believe in making a positive impact through gift giving, which includes purchasing from companies/brands which support social and/or environmental causes.

- One-third of holiday shoppers (34%) indicate they purchase from companies which support good causes.

- Three in ten holiday shoppers (29%) indicate they purchase gifts that are associated with a social or environmental cause.

- Millennials and women are far more likely to try an make a positive impact via causes. This includes nearly four-fifths of Millennials (78%) and seven in ten women (71%) who believe in making a positive impact through gift giving, more than two-fifths of Millennials (44%) and nearly two-fifths of women (38%) who purchase from companies which support good causes, and two-fifths of Millennials (39%) and one-third of women (33%) that purchase gifts that are associated with a social or economic cause.

- Four-fifths of holiday shoppers (81%) believe malls often have a positive impact on the community during the holiday season as they provide/sponsor events for the less fortunate.

Holiday Shopping Behavior

Most holiday shoppers will be at the mall this season. For most, holiday shopping season begins early.

- More than four-fifths of holiday shoppers (83%) will be likely to go to the mall this season. This includes one-half (50%) who will be very likely to shop at a mall.

    - Younger generations are more likely to shop at the mall, ranging from nine in ten Millennials (89%) to seven in ten Seniors (71%).

    - The wide variety of shopping options (78%) is the most cited reason for shopping in malls during the holiday season.

- Nearly four-fifths of holiday shoppers (79%) begin their holiday shopping prior to Thanksgiving weekend, and one-fifth (20%) begin prior to September. However, one in seven males (15%) will wait until after Cyber Monday to begin their shopping.

- One-half of holiday shoppers plan to shop on Black Friday (50%).

    - More than four-fifths of Black Friday shoppers (84%) indicate they will shop in-stores.

    - One-fifth of holiday shoppers (21%) plan to shop on Thanksgiving night this year, with four-fifths of these shoppers (81%) going to physical stores.

Gift cards and clothing will be the most commonly gifted items this holiday season.

- More than three-fifths of holiday shoppers plan to give gift cards (62%) and clothing (62%) as gifts this year.

    - A slight majority (54%) are hoping to receive a gift card this year and nearly two-fifths (38%) are hoping to receive clothing.

- More than seven in ten parents (72%) plan to give toys, books or games for children as gifts this year, and one-half of holiday shoppers overall (49%) plan to give this as a gift.

- Women underestimate their significant other's wanting of tools this holiday season, while men are likely to be unaware of a range of gifts wanted by their significant others.

    - One-fifth of women who are married or living with someone (21%) believe their significant other would like tools as a gift this year, although three in ten men who are married/living with someone (31%) indicated they would like it as a gift.

    - One-third of men who are married or living with someone (33%) believe their significant other would like gift cards this year, compared to three-fifths of women who are married/living with someone (61%) who indicated they are hoping to receive gift cards this year.

    - One in seven men who are married or living with someone (14%) believe their significant other would like kitchen gifts this year, compared to one-quarter of women who are married/living with someone (26%) who indicated they are hoping to receive it this year.

- One-fifth of holiday shoppers (20%) are hoping to receive jewelry this year.

    - Three-fifths of women who would like jewelry are hoping to get a necklace or chain (59%) and a majority would like earrings (53%). Nearly one-half hope to receive diamonds (48%).

    - Nearly three-fifths of men who would like jewelry are hoping to get a watch (57%). More than three-fifths hope to receive gold (62%).

Children & The Holidays

- Three-quarters of adults with children in their household (75%) indicate children will make a wish list this year, and virtually all of these adults (99%) say the wish list is important when selecting gifts for their children.

- Nine in ten adults with children who plan to make a wish list (91%) indicate the wish list will be made on paper (written down). Less than one-fifth (17%) will make a wish list online, with one in ten (10%) making it via social media.

- One-half of adults with children in their household (50%) indicate one or more children in the household will be purchasing gifts for others this year.

Detailed Findings:
Holiday Shopping Behavior

For most, the 2014 holiday shopping season begins before Thanksgiving weekend.

- Nearly four-fifths of holiday shoppers (79%) begin their holiday shopping prior to Thanksgiving weekend.

- One-fifth of holiday shoppers (20%) begin their holiday shopping before October.

- One-quarter of parents (25%) and females (24%) begin their holiday shopping before October.

- One in seven men (15%) start their holiday shopping after Cyber Monday.

When Planning To Begin Holiday Shopping

Base: Total Respondents (n=1,048)
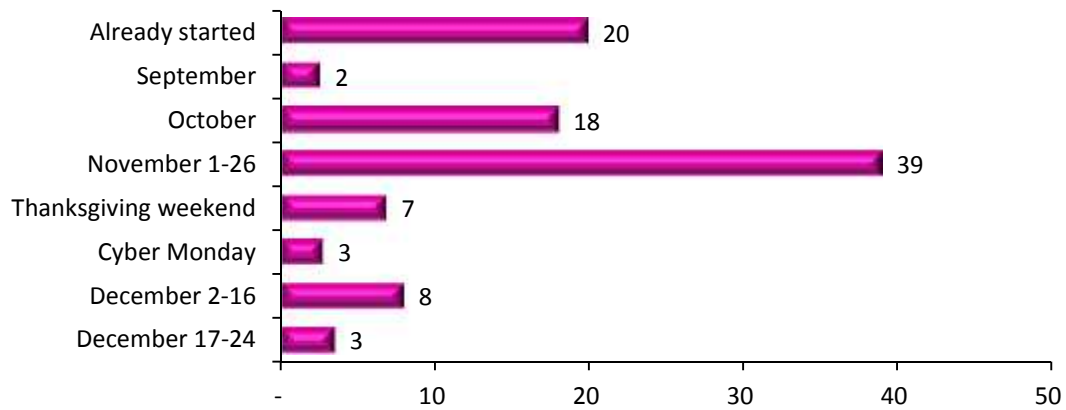
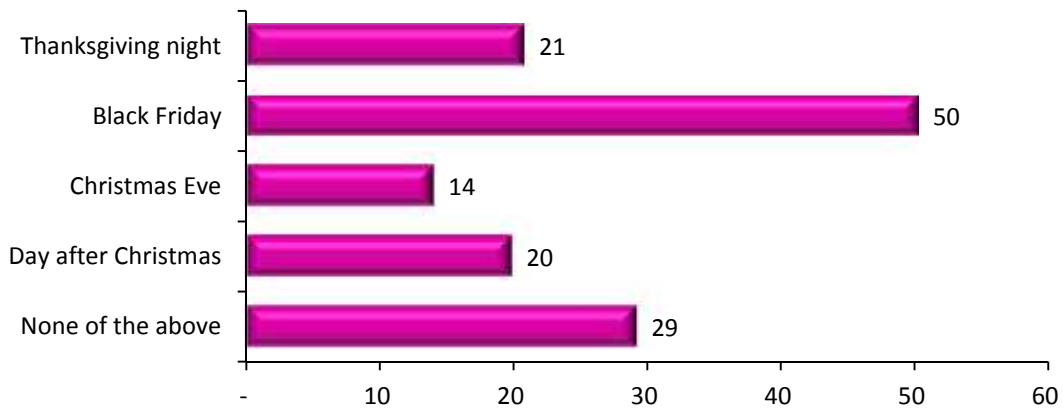|	Gender		Generation				Planned Mall Shoppers	Parent	Non-Parent
	Male	Female	Millenial	Gen X	Baby Boomer	Senior			
Total Respondents	(515)	(533)	(314)	(332)	(343)	(59)	(875)	(346)	(702)
	%	%	%	%	%	%	%	%	%
Already started	15	24	21	18	19	25	20	25	18
September	3	2	3 B	4 B	1	2	3	4	2
October	16	20	18	18	18	14	19	20	17
November 1-26	39	39	44 BS	43 BS	32	29	40	40	38
Thanksgiving weekend	10	4	4	7	8 M	10	6	3	8
Cyber Monday	2	3	1	2	5 MG	3	3	1	3
December 2-16	10	6	6	5	12	12	7	5	10
December 17-24	5	2	3	3	4	5	3	1	4

Q.2   When do you plan to begin your holiday shopping this year?

One-half of holiday shoppers plan to shop on Black Friday and Cyber Monday this year.

- One-half of holiday shoppers plan to shop on <u>Black Friday</u> (50%).

- One-fifth of holiday shoppers (21%) plan to shop on <u>Thanksgiving night</u> this holiday season.

- One in seven holiday shoppers (14%) plan to shop on <u>Christmas Eve</u> this holiday season.

- Millennials are significantly more likely than all other generations to plan to shop on <u>Black Friday</u> (67%) and <u>Christmas Eve</u> (20%) this holiday season.

Specific Days To Holiday Shop

Base: Total Respondents (n=1,048)

Day	Value
Thanksgiving night	21
Black Friday	50
Christmas Eve	14
Day after Christmas	20
None of the above	29

	Generation				Planned Mall Shoppers	Parent	Non-Parent
	Millenial	Gen X	Baby Boomer	Senior			
Total Respondents	(314)	(332)	(343)	(59)	(875)	(346)	(702)
	%	%	%	%	%	%	%
Thanksgiving night	27 BS	25 BS	13	5	23	32	15
Black Friday	67 GBS	54	37 S	15	55	61	45
Christmas Eve	20 BS	14	10	5	16	18	12
Day after Christmas	23 GBS	23	14	15	22	28	16
None of the above	15 B	23 B	42	63	25	19	34

Q.3   Do you plan on holiday shopping on any of the following days this year?

Most Thanksgiving Night and Black Friday shoppers will be in stores.

- Four-fifths of Thanksgiving night shoppers (81%) will shop in stores, with three in ten (30%) shopping in stores exclusively.

- Nine in ten women who plan to shop on Thanksgiving night (90%) will shop in stores, significantly higher than for men (70%).

- Four-fifths of Millennials who plan to shop on Thanksgiving night (81%) will shop online, significantly higher than Gen X (62%) and Baby Boomers (64%).

- More than four-fifths of Black Friday shoppers (84%) will shop in stores, with one-third (33%) shopping in stores exclusively.

- One-third of Cyber Monday shoppers (32%) will shop in stores, including two-fifths of Baby Boomers (40%).

Shopping Methods On Large Holiday Shopping Days

Base: Total Plan To Shop This Day (Bases Vary)

		Gender		Generation			
	Total	Male	Female	Millenial	Gen X	Baby Boomer	Senior
	%	%	%	%	%	%	%
Thanksgiving Night							
Total Who Plan To Shop This Day	(217)	(99)	(118)	(85)	(84)	(45)	(3)**
Online Only	19	30	10	20	15	24	33
Physical Stores Only	30	21	37	19	38 M	36 M	33
Both	51	48	53	61 B	46	40	33
Online (total)	70	79	63	81 GB	62	64	67
In-Store (total)	81	70	90	80	85	76	67
Black Friday							
Total Who Plan To Shop This Day	(526)	(254)	(272)	(211)	(178)	(128)	(9)**
Online Only	16	17	15	13	20	16	11
Physical Stores Only	33	30	36	31	30	40	33
Both	51	53	49	56 B	49	44	56
Online (total)	67	70	64	69	70	60	67
In-Store (total)	84	83	85	87	80	84	89

Q.4   Where do you plan to shop on each of the following days?

Most Christmas Eve and Day After Christmas shoppers will also be in stores.

- More than nine in ten Christmas Eve shoppers (92%) will shop in stores.

- Three-quarters of Baby Boomers who plan to shop on Christmas Eve (76%) will shop exclusively in stores.

- More than four-fifths of Day After Christmas shoppers (85%) will shop in stores.

Shopping Methods On Large Holiday Shopping Days

Base: Total Plan To Shop This Day (Bases Vary)

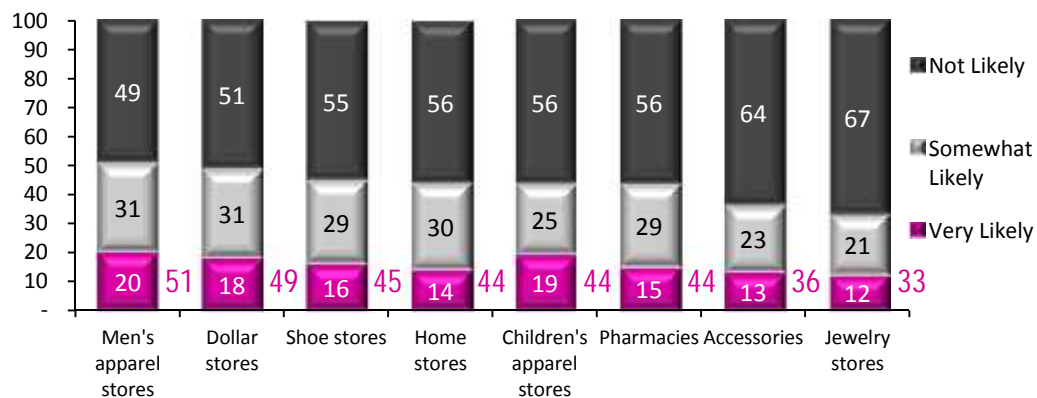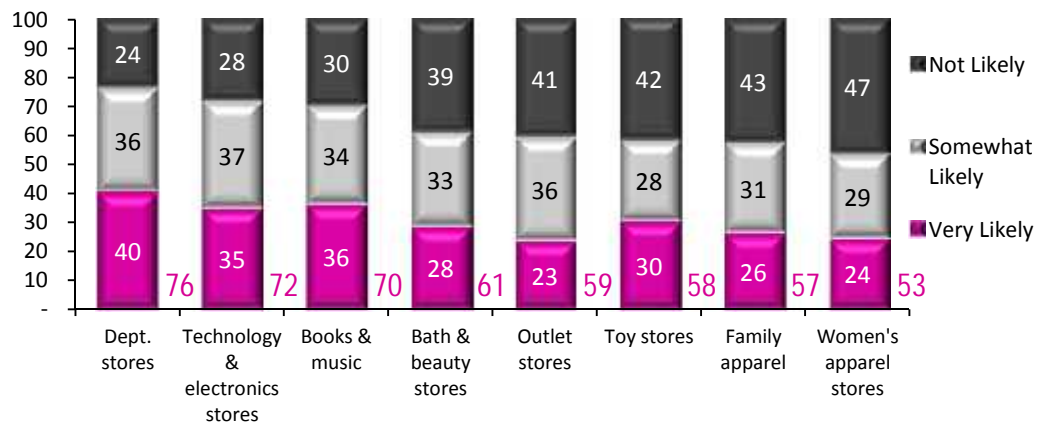|		Gender		Generation			
						Baby	
	Total	Male	Female	Millenial	Gen X	Boomer	Senior
	%	%	%	%	%	%	%
Christmas Eve							
Total Who Plan To Shop This Day	(146)	(79)	(67)	(63)	(47)	(33)	(3)**
Online Only	8	10	4	8	11	3	-
Physical Stores Only	45	44	45	30	45	76 MG	-
Both	48	46	51	62 B	45 B	21	100
Online (total)	55	56	55	70	55	24	100
In-Store (total)	92	90	96	92	89	97	100
Day After Christmas							
Total Who Plan To Shop This Day	(207)	(93)	(114)	(72)	(77)	(49)	(9)**
Online Only	15	19	12	19	14	14	-
Physical Stores Only	34	29	39	21	38 M	45 M	56
Both	50	52	49	60 B	48	41	44
Online (total)	66	71	61	79 GB	62	55	44
In-Store (total)	85	81	88	81	86	86	100

Q.4   Where do you plan to shop on each of the following days?

Department, technology/electronic, and books/music stores will be most widely shopped this upcoming holiday season.

- Three-quarters of holiday shoppers (76%) are likely to shop at a <u>department store</u> this upcoming holiday season.

- More than seven in ten holiday shoppers (72%) are likely to shop at a <u>technology and electronics store</u> this upcoming holiday season.

- Seven in ten holiday shoppers (70%) are likely to shop at a <u>books and music store</u> this upcoming holiday season.

- Three-fifths of holiday shoppers (61%) are likely to shop at a <u>bath & beauty store</u> this upcoming holiday season.

- Nearly three-fifths of holiday shoppers (59%) are likely to shop at an <u>outlet store</u> this upcoming holiday season.

- Nearly three-fifths of holiday shoppers (58%) are likely to shop at a <u>toy store</u> this upcoming holiday season.

Types Of Stores Places Plan To Holiday Shop

Base: Total Respondents (n=1,048)

	Dept. stores	Technology & electronics stores	Books & music	Bath & beauty stores	Outlet stores	Toy stores	Family apparel	Women's apparel stores
Not Likely	24	28	30	39	41	42	43	47
Somewhat Likely	36	37	34	33	36	28	31	29
Very Likely	40	35	36	28	23	30	26	24
Total	76	72	70	61	59	58	57	53

	Men's apparel stores	Dollar stores	Shoe stores	Home stores	Children's apparel stores	Pharmacies	Accessories	Jewelry stores
Not Likely	49	51	55	56	56	56	64	67
Somewhat Likely	31	31	29	30	25	29	23	21
Very Likely	20	18	16	14	19	15	13	12
Total	51	49	45	44	44	44	36	33

Q.5   And how likely do you think you will be to do your holiday shopping at each of the following types of stores this upcoming holiday season?

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Most holiday shoppers support charitable causes throughout the holiday season, with shopping one method used by a considerable percentage of shoppers.

- More than four-fifths of holiday shoppers (83%) support charitable causes during the holiday season.

- One-third of holiday shoppers (34%) support charitable causes during the holiday season by purchasing from companies that support good causes.

- Three in ten holiday shoppers (29%) support charitable causes during the holiday season by purchasing gifts that are associated with a social or environmental cause.

- Millennials are significantly more likely than other generations to support charitable causes during the holiday season by purchasing from companies that support good causes (44%) and purchasing gifts that are associated with a social or environmental cause (39%).

Methods Of Supporting Charitable Causes During Holiday Season

Base: Total Respondents

		Gender		Generation			
	Total	Male	Female	Mill-enial	Gen X	Baby Boomer	Senior
Total Respondents	(1048)	(515)	(533)	(314)	(332)	(343)	(59)
		%	%	%	%	%	%
Support Charitable Causes During The Holiday Season (net)	83	81	86	85	82	82	90
Donate money to a charitable organization	62	61	63	58	60	64	75 GB
Purchase from a company that supports a good cause	34	31	38	44 GB	31	29	37
Purchase gifts that are associated with a social or environmental cause	29	25	33	39	23	26	25
Volunteer time with a charitable organization	20	21	18	25	16	18	17
Other	2	1	3	1	2	3	7 GB
Do not support charitable causes during the holidays	17	19	14	15	18	18	10

Q.18   How do you like to support charitable causes during the holiday season?

The vast majority of holiday shoppers will be in malls this holiday season.

- More than four-fifths of holiday shoppers (83%) are likely to shop at a <u>traditional shopping mall</u> this upcoming holiday season.

- Millennials (89%) are significantly more likely than other generations to shop at a <u>traditional shopping mall</u> this holiday season.

Holiday shopping plans differ by gender.

- Men are significantly more likely than women to be likely to shop at <u>technology/ electronic</u> (78% vs. 65%), <u>men's apparel</u> (54% vs. 47%), and <u>jewelry stores</u> (41% vs. 26%).

- Women are significantly more likely than men to be likely to shop at <u>bath & beauty</u> (68% vs. 54%), <u>family apparel</u> (61% vs. 54%), <u>women's apparel</u> (60% vs. 47%), <u>dollar</u> (55% vs. 43%), and <u>children's apparel stores</u> (47% vs. 40%), as well as <u>pharmacies</u> (48% vs. 39%).

- Millennials are significantly more likely than all other generations to be likely to shop at <u>technology/electronic</u> (84%), <u>bath & beauty</u> (76%), <u>family apparel</u> (73%), <u>women's apparel</u> (67%), <u>men's apparel</u> (65%), <u>shoe</u> (66%), <u>home</u> (55%), <u>children's apparel</u> (57%), <u>accessories</u> (52%), and <u>jewelry stores</u> (43%).

- More than two-fifths of married men (45%) are likely to shop at a <u>jewelry store</u> this holiday season.

With the exception of books & music stores, most shoppers of all store types plan to shop at physical store locations.

- More than nine in ten holiday shoppers who plan to shop <u>family apparel</u> (92%), <u>department stores</u> (92%), and <u>outlet stores</u> (91%) will shop in-store.

- Three-fifths of likely <u>books & music</u> store shoppers (60%) will likely shop in stores this holiday season, the lowest percentage across all store types.

Variety is the key driver of mall shopping during the holidays.

- Nearly four-fifths of likely holiday mall shoppers (78%) indicated they plan to shop at malls this holiday season due to the <u>wide variety of shopping options</u>. Women (81%) are significantly more likely than men (74%) to name this option.

- Millennials are significantly more likely than other generations to indicate they plan to shop at malls this holiday season due to the <u>ability to get good deals on gifts</u> (61%).

Detailed Findings:
Gift Giving

Parents overwhelmingly find their children to be their favorite people to shop for during the holidays, while others most prefer to shop for a significant other.

- More than seven in ten parents (72%) indicate their <u>children</u> are their favorite people to shop for during the holidays.

- Nearly two-fifths of non-parents (38%) identified a <u>significant other</u> as their favorite person to shop for (27% spouse/partner, 11% boyfriend/girlfriend).

Favorite Person To Shop For During Holidays

Base: Total Respondents (n=1,048)
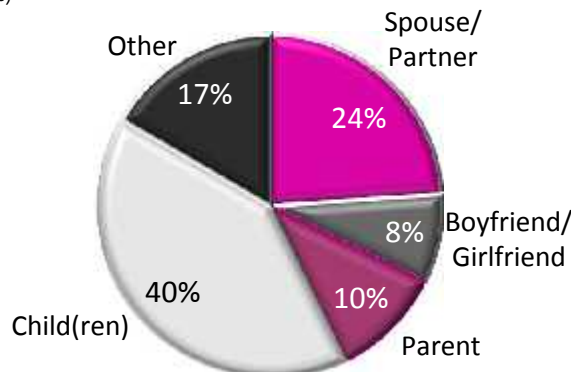
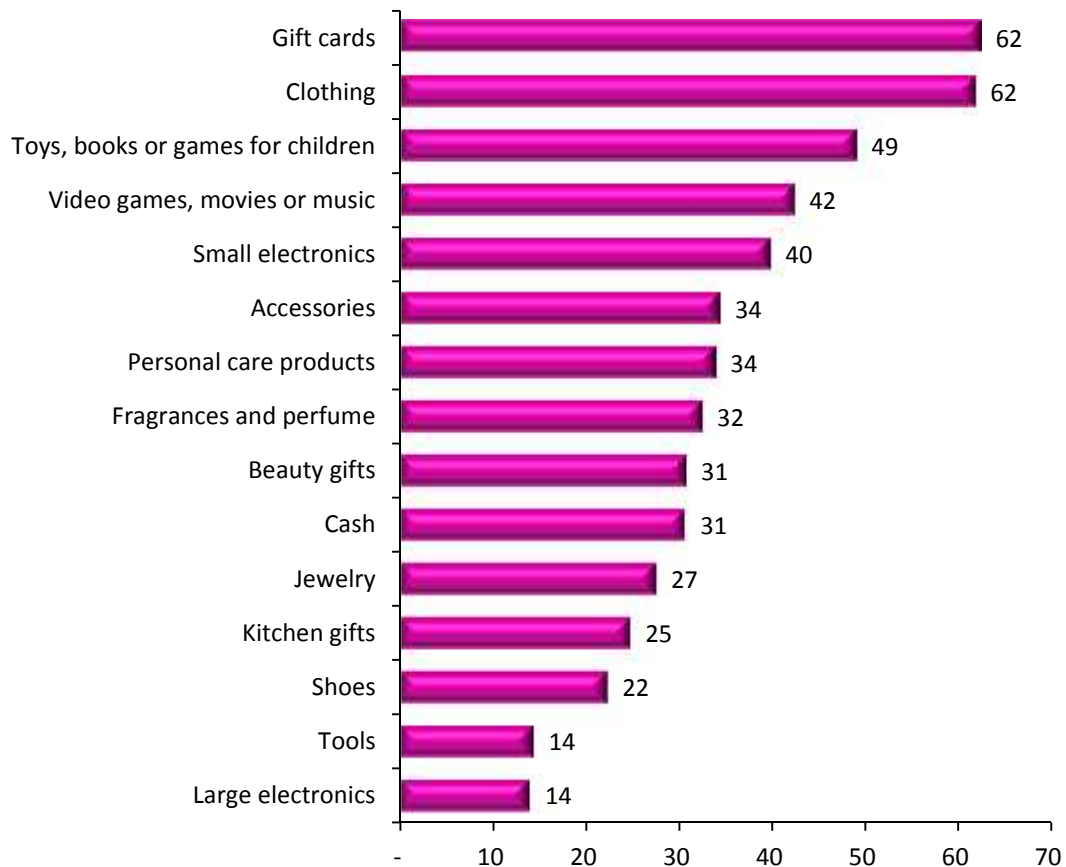|	Gender		Generation				Married		Married			
	Male	Female	Mill-enial	Gen X	Baby Boomer	Senior	Married	Not Married	Men	Women	Parent	Non-Parent
Total Respondents	(515)	(533)	(314)	(332)	(343)	(59)	(515)	(527)	(254)	(261)	(346)	(346)
	%	%	%	%	%	%	%	%	%	%	%	%
Spouse/partner	29	19	16	23 M	31 MG	27 M	41	7	48	34	18	27
Boyfriend/girlfriend	9	8	19 GBS	4	3	3	1	15	2	-	2	11
Mother	11	7	14 BS	9 BS	5	2	2	16	2	1	3	12
Father	3	0	2	2	1	-	1	3	2	-	1	2
Child(ren)	32	49	30	51 MB	40 M	39	49	32	40	57	72	25
Extended family member	7	7	6	5	9 G	12 G	3	10	2	5	1	10
Friend	8	5	11 GB	4	5	5	1	12	2	0	1	9
Someone else	2	4	2	1	5 MG	10 MG	2	4	2	2	1	4
Nobody	-	1	0	-	0	2	0	0	-	0	-	0
Don't know	0	0	0	0	-	-	-	0	-	-	-	0

Q.7   Who do you think will be your favorite person to shop for this holiday season?

Gift cards and clothing will be the most widely given gifts this holiday season.

- More than three-fifths of holiday shoppers (62%) plan to give <u>gift cards</u> to someone this holiday season.

- More than three-fifths of holiday shoppers (62%) plan to give <u>clothing</u> to someone this holiday season.

- One-half of holiday shoppers (49%) plan to give <u>toys, books or games for children</u> to someone this holiday season.

- More than two-fifths of holiday shoppers (42%) plan to give <u>video games, movies, or music</u> to someone this holiday season.

- Two-fifths of holiday shoppers (40%) plan to give <u>small electronics</u> to someone this holiday season.

Gifts Plan To Give This Holiday Season

Base: Total Respondents (n=1,048)

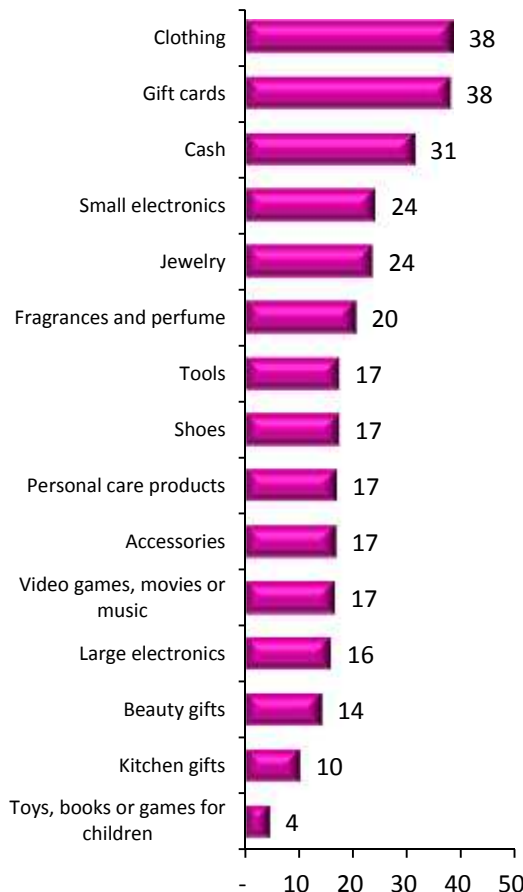| Category	Value
Gift cards	62
Clothing	62
Toys, books or games for children	49
Video games, movies or music	42
Small electronics	40
Accessories	34
Personal care products	34
Fragrances and perfume	32
Beauty gifts	31
Cash	31
Jewelry	27
Kitchen gifts	25
Shoes	22
Tools	14
Large electronics	14

Q.9   Which, if any, of the following gift categories do you plan on giving to someone this year?

Russell
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Men believe their spouse/partner would like clothing and jewelry this holiday season, while women most commonly think their significant other would like gift cards and cash.

- Nearly two-fifths of holiday shoppers who are married or living with someone believe their significant other would like <u>clothing</u> (38%) or <u>gift cards</u> (38%).

- Men are most likely to believe their significant other would like <u>clothing</u> (44%), <u>jewelry</u> (42%), and <u>gift cards</u> (33%) this year.

- Women are most likely to believe their significant other would like <u>gift cards</u> (43%), <u>cash</u> (36%), and <u>tools</u> (31%) this year.

Gifts Spouse/Partner Hoping To Receive This Holiday Season

Base: Total Married/Living with Someone (n=603)

Clothing	38
Gift cards	38
Cash	31
Small electronics	24
Jewelry	24
Fragrances and perfume	20
Tools	17
Shoes	17
Personal care products	17
Accessories	17
Video games, movies or music	17
Large electronics	16
Beauty gifts	14
Kitchen gifts	10
Toys, books or games for children	4

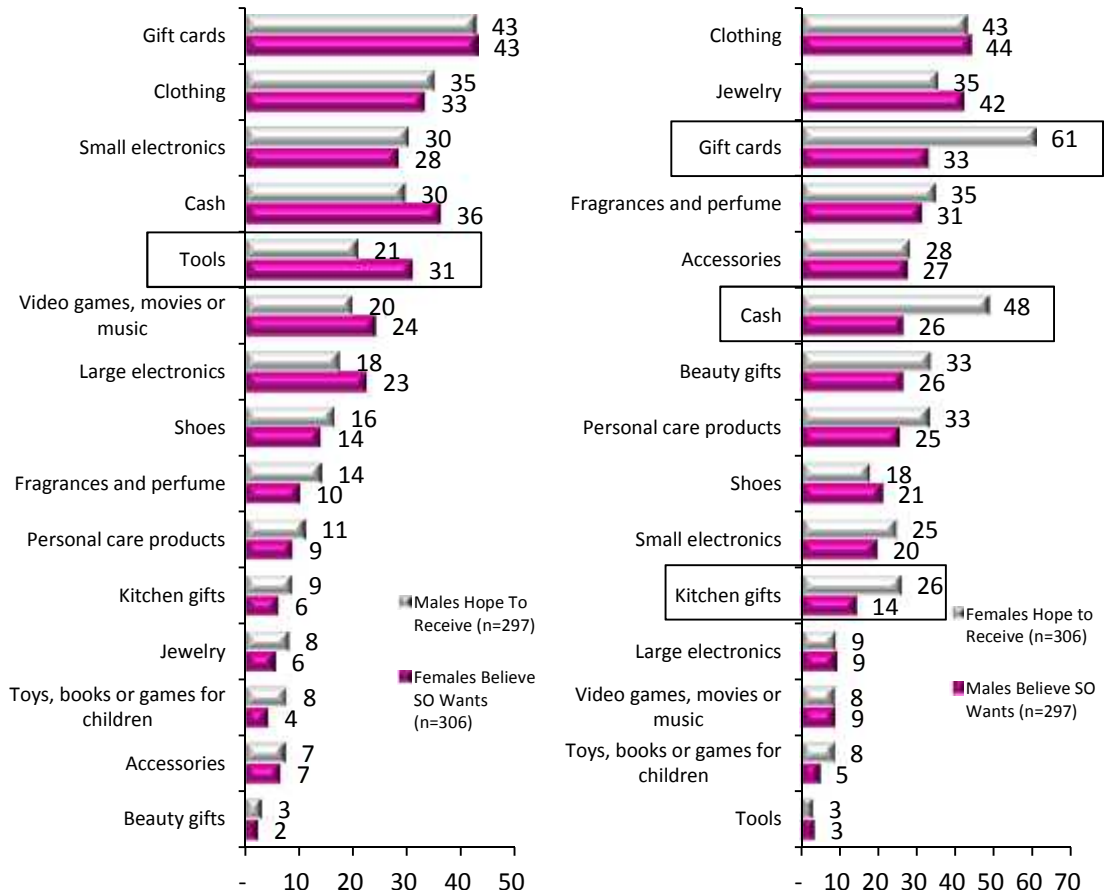|	Gender	
	Male	**Female**
Total Married/Living with Someone	(297)	(306)
	%	%
Clothing	44	33
Gift cards	33	43
Cash	26	36
Small electronics	20	28
Jewelry	42	6
Fragrances and perfume	31	10
Shoes	21	14
Tools	3	31
Personal care products	25	9
Accessories	27	7
Video games, movies or music	9	24
Large electronics	9	23
Beauty gifts	26	2
Kitchen gifts	14	6
Toys, books or games for children	5	4
Other	2	4
Nothing	1	2
Don't know	2	3
No answer	0	-

Q.10b   And which, if any, of the following gift categories is your spouse or partner hoping to receive this year?

In general, women are more attuned to the holiday wants of their significant others. Men underestimate their significant others' desire for gift cards and cash during the holidays.

▪ One-third of men who are married or living with someone (33%) believe their significant other would like <u>gift cards</u> this year, and one-quarter (26%) believe they would like <u>cash</u>, compared to three-fifths of women who are married/living with someone (61%) who indicated they are hoping to receive gift cards this year, and nearly one-half (48%) who would like cash.

▪ One in seven men who are married or living with someone (14%) believe their significant other would like <u>kitchen gifts</u> this year, compared to one-quarter of women who are married/living with someone (26%) who indicated they are hoping to receive it this year.

▪ One-fifth of women who are married or living with someone (21%) believe their significant other would like <u>tools</u> this year, compared to nearly three in ten men who are married/living with someone (31%) who indicated they are hoping to receive it this year.

Hope To Receive Vs. Perceived Wants

Base: Total Married/Living with Someone (n=603)

Category	Males Hope To Receive (n=297)	Females Believe SO Wants (n=306)
Gift cards	43	43
Clothing	35	33
Small electronics	30	28
Cash	30	36
Tools	21	31
Video games, movies or music	20	24
Large electronics	18	23
Shoes	16	14
Fragrances and perfume	14	10
Personal care products	11	9
Kitchen gifts	9	6
Jewelry	8	6
Toys, books or games for children	8	4
Accessories	7	7
Beauty gifts	3	2

Category	Females Hope to Receive (n=306)	Males Believe SO Wants (n=297)
Clothing	43	44
Jewelry	35	42
Gift cards	61	33
Fragrances and perfume	35	31
Accessories	28	27
Cash	48	26
Beauty gifts	33	26
Personal care products	33	25
Shoes	18	21
Small electronics	25	20
Kitchen gifts	26	14
Large electronics	9	9
Video games, movies or music	8	9
Toys, books or games for children	8	5
Tools	3	3

Q.10a   *Which, if any, of the following gift categories are you hoping to receive this year?*
Q.10b   *And which, if any, of the following gift categories is your spouse or partner hoping to receive this year?*

Women want necklaces/chains, earrings, and rings this year, while men prefer watches. While everyone likes diamonds, men are far more likely to prefer gold.

- Three-fifths of women (59%) who want jewelry this year are hoping to receive a <u>necklace or chain</u> and more than one-half (53%) are hoping to receive <u>earrings</u>.

- Nearly three-fifths of men (57%) who want jewelry this year are hoping to receive a <u>watch</u>.

- Nearly one-half of all adults hoping to receive jewelry this year (48%) are hoping to receive <u>diamonds</u>. This is equal by gender.

- More than three-fifths of men hoping to receive jewelry this year (62%) are hoping to receive <u>gold</u>.

- Nearly one-half of men hoping to receive jewelry this year (48%) are hoping to receive <u>silver</u>.

Holiday Jewelry Wants

Base: Total Hope To Receive Jewelry
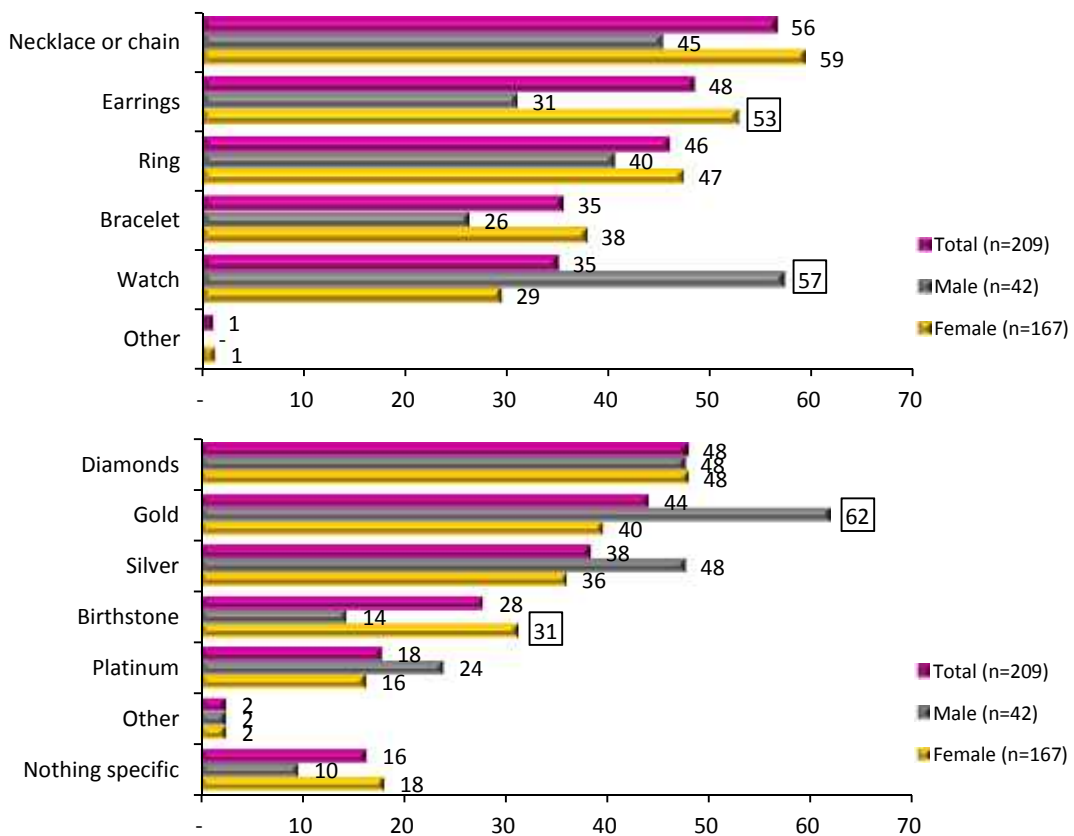
Q.11a   You indicated that you are hoping to receive jewelry as a gift this year. What specifically are you hoping to receive?

Q.11b   And are there any specific types of metals/stones that you are hoping to receive this holiday season??

There are considerable differences in gift buying behavior across a range of demographic segments.

- In general, females are more likely than males to give gifts in most categories. However, males are significantly more likely to give <u>large electronics</u> as a gift this holiday season (18% vs. 10%).

- Millennials are significantly more likely than other generations to give <u>video games, movies, or music</u> (59%), <u>beauty gifts</u> (41%) or <u>shoes</u> (34%) this holiday season.

- Married adults are significantly more likely than non-married adults to give <u>clothing</u> (67% vs. 57% non-married), <u>toys, books or games for children</u> (56% vs. 43%), <u>kitchen gifts</u> (28% vs. 22%), and <u>tools</u> (17% vs. 11%) this holiday season.

- Parents are more likely to give most product categories this holiday season.

Gifts that allow the recipient choice are most commonly wanted by holiday shoppers.

- More than one-half of holiday shoppers (54%) are hoping to receive <u>gift cards</u> this year and more than two-fifths (45%) hope to receive <u>cash</u>.

Women and Millennials tend to want the most different types of gifts this holiday season.

- Women are significantly more likely than men to want a wide variety of gifts this holiday season, most commonly in the <u>gift card/ clothing/apparel, and beauty</u> categories.

- Millennials are significantly more likely than other generations to want gifts in almost all categories.

- Men are significantly more likely than women to want <u>small electronics</u> (31% vs. 24%), <u>video games, music, or movies</u> (25% vs. 11%), <u>large electronics</u> (20% vs. 10%), and <u>tools</u> (15% vs. 3%) this holiday season.

Detailed Findings:
Children & The Holidays

Wish lists are very popular this year, though are still largely created using traditional methods.

- Three-quarters of adults with children in their household (75%) indicate they will be making a wish list this holiday season. Of these households, 99% indicate the list is important in selecting gifts, and nearly two-thirds (64%) indicate it is <u>very</u> important.

- Nine in ten adults with children making a wish list this year (91%) indicate the lists will be made on <u>paper (written down)</u>.

- One in six adults with children making a wish list this year (17%) indicate the lists will be made <u>online</u> – either using non-social media (12%) or social media (12%).
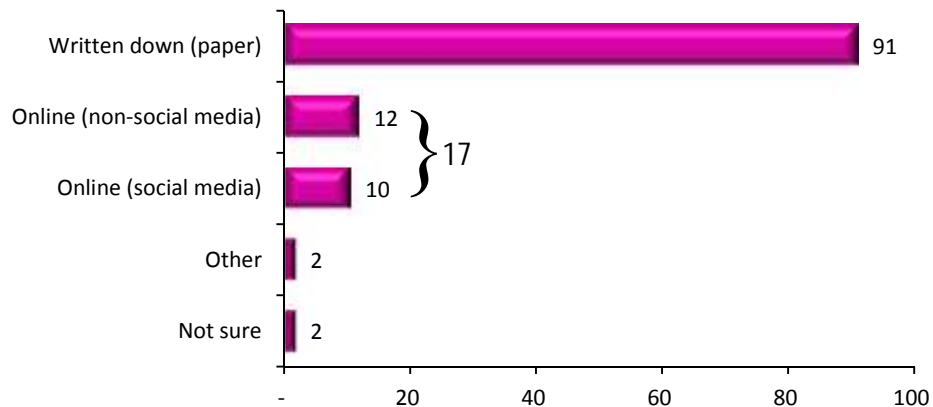
Children Wish List Creation & Importance
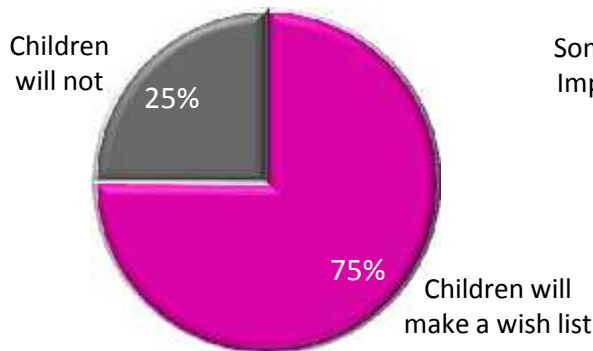
Base: Total With Children in Household (n=397)   Base: Total With Children in HH Making Wish List (n=298)
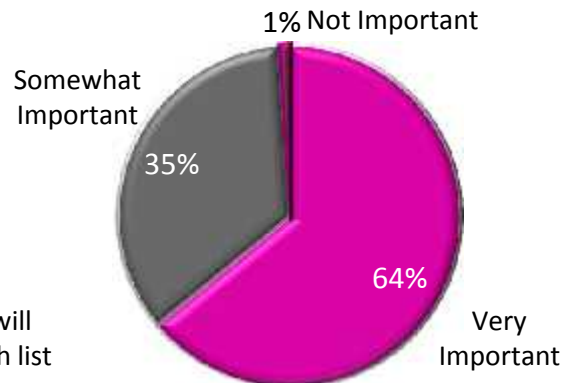
Base: Total With Children in HH Making Wish List (n=298)

Q.13c   *Will any of your children be making a wish list this holiday season?*
Q.13d   *How important will this wish list be to you when selecting gifts for your child(ren)?*
Q.13e   *To the best of your knowledge, how will this wish list be made?*

*One-half of children will be purchasing gifts for others this year.*

- One-half of adults with children in their household (50%) indicate one or more of the children in their household will be buying gifts for others this year.

- On average, these children will be purchasing gifts for 4 people this year.

- Three in ten children purchasing gifts for others this year (30%) will be purchasing for 5 or more people.

Children Purchasing Gifts For Others

Base: Total With Children in Household (n=397)

Children will not — 50%

50% — Children will be buying gifts for others
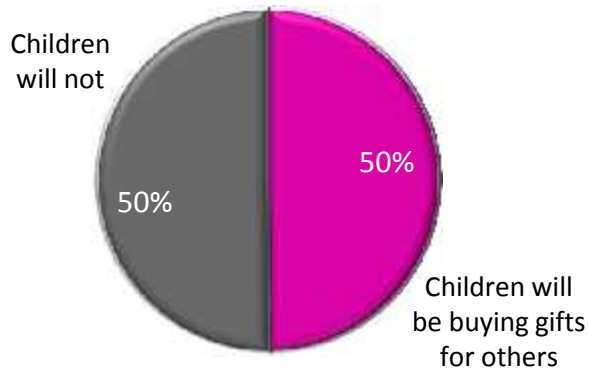
Base: Total With Children in HH Buying Gifts for Others (n=198)

Mean No. of People: 4.0

1 person — 10%

5 or more people — 30%

26% — 2 people

18% — 4 people

16% — 3 people
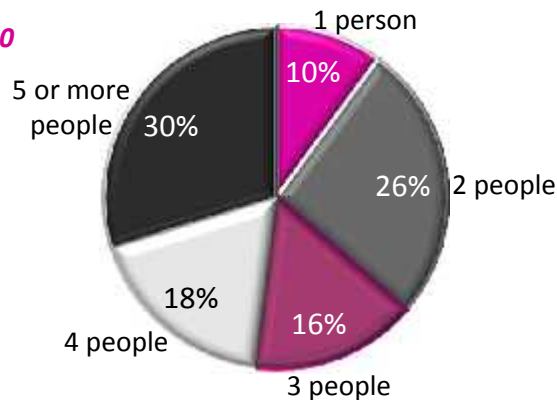
Q.13f   *Will any of your children under the age of 18 be buying gifts for others this holiday season?*
Q.13g   *For approximately how many people will your children who are under the age of 18 be purchasing gifts for this holiday season?*

Respondent Profile

		Gender		Generation				Planned Mall Shoppers
	Total	Male	Female	Millenial	Gen X	Baby Boomer	Senior	
Total Respondents	(1048)	(515)	(533)	(314)	(332)	(343)	(59)	(875)
		%	%	%	%	%	%	%
Gender								
Male	49	100	-	48	52	48	42	49
Female	51	-	100	52	48	52	58	51
Age								
18 To 34 (net)	33	32	33	100	8	-	-	35
35 To 54 (net)	40	41	40	-	92	34	-	40
55 Or Older (net)	27	27	27	-	-	66	100	25
Mean	*44.0*	*44.3*	*43.8*	*25.7*	*41.2*	*58.3*	*74.2*	*43.1*
Median	*44.0*	*44.0*	*43.0*	*26.0*	*41.0*	*59.0*	*74.0*	*42.0*
Marital Status								
Married	49	49	49	31	59 M	55 MG	56 M	49
Not Married (net)	50	50	51	67 GBS	40	45	44	50
Refused	1	1	0	2	0	-	-	1
Hispanic Origin/Descent								
Hispanic	14	15	13	20 BS	16 BS	7	3	13
Not Hispanic	86	85	87	79	84	92 MG	97 MG	86
Refused	0	0	1	1	-	1	-	1
Ethnic Background								
Caucasian	75	76	74	62	74 M	85 MG	85 M	73
African-American	13	13	12	14	14	10	10	14
Asian/Pacific Islander	4	3	6	8 GB	4 B	1	2	4
Native American	2	2	2	5	2	1	2	2
Mixed ethnic background	2	1	2	3	2	1	2	2
Other	2	2	1	3 B	2 B	-	-	1
Refused	3	3	2	5	3	1	-	3
Mean Household Size:	*2.8*	*2.7*	*2.9*	*3.2* BS	*3.2* BS	*2.3* S	*1.9*	*2.8*
Parent								
Parent	33	31	35	36 BS	58 MBS	12 S	2	35
Not the parent	67	69	65	64	42	88	98	65
Presence of Children								
Children Present (net)	38	36	40	48 BS	58 MBS	14 S	3	40
No children present	62	64	60	52 G	42	86 MG	97 MGB	60
Education								
No College (net)	25	22	27	27	25	23	22	23
College (net)	75	78	73	73	75	77	78	77
Refused	0	-	0	0	-	-	-	0
Employment								
Employed (net)	53	64	42	53 BS	72 MBS	41 S	17	55
Not Employed (net)	46	35	58	46 G	28	59 MG	83 MGB	44
Refused	0	1	0	1	1	0	-	0
Mean Household Income	*$64.2 k*	*$69.7 k*	*$58.7 k*	*$57.6 k*	*$70.9 k* M	*$64.6 k*	*$57.9 k*	*$65.4 k*
Median Household Income	*$50.5 k*	*$57.6 k*	*$45.7 k*	*$44.7 k*	*$58.6 k*	*$53.0 k*	*$41.8 k*	*$52.4 k*
Community Type								
Urban	31	34	29	38 BS	34 B	25	24	32
Suburban	51	50	51	45	53 M	51	59 M	51
Rural	18	15	20	17	13	24 M	17	16
Home Ownership								
Rent (net)	36	34	39	51 GBS	36 BS	27	17	37
Own (net)	59	62	56	40	60 M	71 MG	81 MG	59
Other	5	4	5	10 GBS	4	2	2	4
Census Region								
Northeast	19	19	18	19	20	18	14	19
South	37	35	39	36	36	38	36	36
Midwest	21	23	20	21	23	19	25	20
West	24	24	23	25	21	25	25	24