



## Holiday Consumer Pulse Poll 9.14.2015

### Methodology

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Rubicon Project engaged global polling firm Penn Schoen Berland to conduct 2009 online interviews among holiday shoppers in the US (MOE  $\pm 3.09\%$ ), UK (MOE  $\pm 4.37\%$ ) and Canada (MOE  $\pm 4.37\%$ ) between August 26 and August 28, 2015.

### Key Findings Across All Markets Polled

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- **WHAT CONSUMERS ARE BUYING:**
  - 30% of consumers in all regions have **already begun their holiday shopping** (US-29%, UK-30%, CA-31%)
    - Consumers plan to be out in force this holiday season as 78% of those surveyed plan to spend the same or more this year than they did last year
      - Approximately 30% of consumers (US-31%, UK-25%, CA-29%) plan to spend **more** holiday shopping this year versus last
      - About half of consumers (US-46%, UK-52%, CA-50%) plan to spend the **same amount** holiday shopping as they did last year
    - Parents will spend the most money on **children** (US-46%, UK-33%, CA-39%) **and significant others** (US-20%, UK-28%, CA-21%)
    - **Gift cards** (US-71%, UK-54%, CA-70%) **and apparel** (US-67%, UK-52%, CA-68%) are the two most popular items consumers are planning to shop for this year followed by **toys** (US-50%, UK-49%, CA-51%)

- About 2 in 5 in the US (40%) and CA (42%) and 1 in 3 (34%) in the UK plan on **purchasing technology**, and are most likely to purchase **tablets** (US-47%, UK-39%, CA-37%) within that category
  - Over 1 in 3 (US-34%, UK-35%, CA-34%) will buy **video games**
  - About half of consumers (US-49%, UK-52%, CA-50%) say **requests from gift recipients** is the largest influence on their holiday shopping
  - The majority of consumers (US-64%, UK-64%, CA-60%) **prefer to buy many smaller gifts** rather than one big ticket item
    - However, about half still plan to **splurge on a big ticket item this year** (US-50%, UK-45%, CA-51%), which will most likely be in the **technology** category
- **HOW CONSUMERS ARE BUYING:**
  - **Online shopping** will be nearly as popular as in-store shopping this holiday season – in the US (75%) and UK (77%) at least 3 in 4 plan to shop online
  - Shoppers plan to spend more than \$300 on tech-related items (US-\$342.63, UK-£285.98, CA-\$339.84)
  - The majority of consumers (US-64%, UK-57%, CA-67%) believe **cost is more important than convenience** when holiday shopping
  - More than 2 in 5 consumers (US-43%, UK-43%, CA-47%) say they will **compare technology options online** before marking a purchase in person

## Key U.S. Findings

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- Americans plan to spend an average of **\$1,051 on holiday shopping** this season, about **\$397 per child**
- In the US, shoppers who plan to do the majority of their holiday shopping online also plan to **spend significantly more – 20% more** – than consumers who plan to do the majority of their shopping in-store
- A quarter of Americans plan to holiday shop on their **smartphones**
- **96% of U.S. parents will shop online** for the holiday
- **Amazon (69%) and Walmart (58%)** dominate as go-to retailers for U.S. holiday shoppers

## Key U.K. Findings

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- U.K. consumers plan to spend an average of around **£730 on Christmas shopping this season**, including spending about **£281** per child and **£217** on themselves
- Although apparel, gift cards, and toys are most popular, **nearly half** plan to purchase **makeup/beauty supplies** and **44%** plan to purchase **jewelry**
- **43%** anticipate **the majority of their Christmas shopping will be done online** but nearly half (**47%**) say last minute purchases will be made in stores
- **Argos** (**44%**), **Marks & Spencer** (**30%**), and **eBay** (**28%**) are top destinations for this Christmas season

## Key Canada Findings

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- Canadian consumers plan to spend an average of **\$1,333 on holiday shopping this season**
- **34%** of Canadians plan to purchase a gift for themselves this year and **spend an average of \$281 per child and \$378 on their own gifts**
- **Best Buy (42%)** and **Toys “R” Us (34%)** lead the way for holiday shopping destinations

## Data

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<b>Have you already begun holiday shopping?</b>	<b>All</b>	<b>US</b>	<b>UK</b>	<b>CA</b>
Yes	30	29	30	31
No	70	71	70	69

<b>Have you already begun holiday shopping?</b> <i>Asked only of Parents</i>	<b>All</b>	<b>US</b>	<b>UK</b>	<b>CA</b>
Yes	42	41	45	39
No	58	59	55	61

<b>Compared to last year, do you plan to spend more or less holiday shopping this year?</b>	<b>All</b>	<b>US</b>	<b>UK</b>	<b>CA</b>
I will spend the same amount this year.	49	46	52	50
I plan to spend more this year.	29	31	25	29
I plan to spend less this year.	22	23	23	21

<b>Compared to last year, do you plan to spend more or less holiday shopping this year?</b> <i>Asked only of Parents</i>	<b>All</b>	<b>US</b>	<b>UK</b>	<b>CA</b>
I will spend the same amount this year.	41	36	44	43
I plan to spend more this year.	40	48	35	37
I plan to spend less this year.	19	16	21	20

<b>Who do you spend the most money on while holiday shopping? Coded 'other' included</b>	<b>All</b>	<b>US</b>	<b>UK</b>	<b>CA</b>
Children	41	46	33	39

Significant other	22	20	28	21
Parents	9	7	11	12
Siblings	7	5	9	8
Nieces and Nephews	5	5	5	6
Friends	5	5	5	4
Myself	5	5	5	6
Family (unspecific)	1	1	0	1
Cousins	0	0	0	1
Co-workers	0	0	0	0
Pets	0	0	0	1
Children's teachers	0	0	0	1
Other	0	0	0	0
Don't Know / No Response	3	4	3	2

<b>Which of the following do you plan to shop for this year when holiday shopping? Please select all that apply. Coded 'other' included</b>	<b>All</b>	<b>US</b>	<b>UK</b>	<b>CA</b>
Gift cards	66	71	54	70
Apparel & accessories (clothes, shoes, etc.)	64	67	52	68
Toys	50	50	49	51
Technology (tablets, laptops, desktops, music player, etc.)	39	40	34	42
Jewelry	35	32	44	31
Video Games	34	34	35	34

Make-up/Beauty supplies	32	25	47	29
Entertainment/Party supplies	23	22	22	27
Sporting goods (bikes, bats, balls, gloves, etc.)	21	23	18	20
Home (furniture, appliances, etc.)	19	19	17	20
Experiences (travel, shows, sporting events, spas, etc.)	16	16	16	17
Mobile devices (cell phones)	14	15	12	14
Automobile (car, motorcycle, etc.)	4	5	2	3
Books/eBooks	2	2	3	2
Food/Beverage	2	1	2	2
CDs/DVDs	1	1	2	0
Cash/Lotto	0	0	1	0
Others	1	1	1	2
None of the above/Don't Know/No Response	2	1	4	1

<b>Which of the following technology items do you plan to purchase? Please select all that apply. Coded 'other' included; Asked only of those who indicated they will be purchasing technology this year</b>	<b>All N = 786</b>	<b>US N = 404</b>	<b>UK N = 169</b>	<b>CA N = 213</b>
Tablet	42	47	39	37
Laptop computer	35	41	25	33
Mobile phone	26	29	27	22
Video game console	25	25	25	26
Camera or video camera	15	16	16	13

Desktop computer	14	17	8	11
TV / Monitor	4	5	3	3
Music player	2	2	1	2
Accessories/peripherals (unspecific)	1	1	1	2
Games	1	0	2	1
Smart Watch	1	0	1	0
Others	2	1	2	3
None of the above / Don't Know / No Response	8	7	10	10

<b>How much money do you plan to spend this year when holiday shopping for technology?</b>	<b>All</b>	<b>US</b>	<b>UK</b>	<b>CA</b>
Mean	-	342.63	285.98	339.84

<b>Which of the following is closer to your view regarding holiday shopping?</b>	<b>All</b>	<b>US</b>	<b>UK</b>	<b>CA</b>
I prefer to buy lots of smaller gifts rather than one big ticket item.	63	64	64	60
I prefer to buy one big ticket item rather than lots of smaller gifts.	37	36	36	40

<b>Do you plan on buying a big ticket item this year when holiday shopping?</b>	<b>All</b>	<b>US</b>	<b>UK</b>	<b>CA</b>
Yes	49	50	45	51
No	51	50	55	49

<b>In which of the following categories do you expect that big ticket item to fall into this year? Asked only of those who indicated they will be buying a big ticket item this year</b>	<b>All N = 985</b>	<b>US N = 503</b>	<b>UK N = 224</b>	<b>CA N = 258</b>
Technology (tablets, laptops, desktops, music player, etc.)	41	41	40	41
Jewelry	8	5	11	10
Home (furniture, appliances, etc.)	7	7	4	9
Toys	6	8	7	4
Video games	6	6	8	7
Mobile devices (cell phones)	5	4	7	5
Experiences (travel, shows, sporting events, spas, etc.)	5	5	4	7
Gift cards	5	6	3	4
Apparel & accessories (clothes, shoes, etc.)	4	4	5	4
Sporting goods (bikes, bats, balls, gloves, etc.)	3	3	3	4
Automobile (car, motorcycle, etc.)	3	5	1	1
Entertainment/Party supplies	2	2	1	0
Make-up/Beauty supplies	0	1	0	0
Other	4	3	6	3



<b>What is the big ticket item you plan on purchasing this year?</b>	<b>All N = 984</b>	<b>US N = 503</b>	<b>UK N = 223</b>	<b>CA N = 258</b>
Apparel & accessories (clothes, shoes, etc.)	2%	2%	4%	2%
Jewelry	6%	4%	8%	7%
Technology (tablets, laptops, desktops, music player, etc.)	25%	25%	26%	26%
Mobile devices (cell phones)	5%	4%	6%	5%
Make-up/Beauty supplies	.%	0%	.%	0%
Entertainment/Party supplies	.%	.%	.%	0%
Experiences (travel, shows, sporting events, spas, etc.)	6%	6%	3%	8%
Sporting goods (bikes, bats, balls, gloves, etc.)	3%	3%	1%	3%
Gift cards	1%	2%	.%	2%
Automobile (car, motorcycle, etc.)	3%	5%	1%	1%
Home (furniture, appliances, etc.)	4%	5%	3%	5%
Toys	4%	4%	4%	4%
Video games/consoles	8%	6%	10%	9%
TV / Home theater system / Stereo	10%	14%	6%	8%
Others	5%	5%	4%	6%
Don't Know / No Response	17%	16%	22%	12%

<b>Which of the following will you use to shop this holiday season? Please select all that apply.</b>	<b>All</b>	<b>US</b>	<b>UK</b>	<b>CA</b>
In-store	81	82	76	86
Online	73	75	77	66
Smartphone	21	25	16	17
Tablet	19	19	20	16
Social media sites (Pinterest, etc.)	7	8	4	8
None of the above	2	3	1	3

<b>Which of the following is closer to your view?</b>	<b>All</b>	<b>US</b>	<b>UK</b>	<b>CA</b>
When holiday shopping, cost is more important than convenience.	63	64	57	67
When holiday shopping, convenience is more important than cost.	37	36	43	33

<b>What motivates you to purchase items online rather than in store? Please select all that apply. Coded 'other' included</b>	<b>All</b>	<b>US</b>	<b>UK</b>	<b>CA</b>
Convenience	62	62	66	58
Lower prices/ability to price compare across websites	62	60	65	63
There are generally more choices/a wider variety of items available online	47	49	48	43
Avoid crowds	0	1	0	0
Free shipping	0	1	0	0

Others	1	1	0	1
None of the above	7	7	5	8

<b>In which of the following categories do you plan to compare options online before making a purchase in person? Please select all that apply.</b>	<b>All</b>	<b>US</b>	<b>UK</b>	<b>CA</b>
Technology (tablets, laptops, desktops, music player, etc.)	44	43	43	47
Apparel & accessories (clothes, shoes, etc.)	36	39	31	36
Toys	31	31	31	29
Video games	25	25	26	26
Home (furniture, appliances, etc.)	20	18	23	20
Jewelry	19	17	23	17
Mobile devices (cell phones)	17	17	17	19
Experiences (travel, shows, sporting events, spas, etc.)	16	15	14	19
Make-up/Beauty supplies	16	14	23	16
Sporting goods (bikes, bats, balls, gloves, etc.)	15	14	17	15
Gift cards	14	16	13	13
Entertainment/Party supplies	10	10	11	9
Automobile (car, motorcycle, etc.)	8	7	8	10
Other	3	2	4	5
None of the above	18	19	22	14

In total, how much money do you think you will spend this holiday season?	All	US	UK	CA
Mean	-	\$1051	£732	\$1133

	US		UK		CA	
Majority of Shopping:	Online (N=340)	In Person (N=577)	Online (N=218)	In Person (N=244)	Online (N=86)	In Person (N=367)
Mean Holiday Spend (Outliers Removed):	\$1211*	\$1011	£800	£739	CA\$1103	CA\$1164

\*Significantly Higher than In Person

In total, how much money do you think you will spend this holiday season on each child? <i>Asked only of Parents</i>	All Parents N = 694	US Parents N = 343	UK Parents N = 168	CA Parents N = 183
Mean	-	\$397	£281	\$345

	US		UK		CA	
Majority of Shopping:	Online (N=126)	In Person (N=200)	Online (N=77)	In Person (N=82)	Online (N=35)	In Person (N=139)
Mean Holiday Spend for each child (Outliers Removed):	\$413	\$397	£302	£267	CA\$391	CA\$340

Do you plan to purchase gifts at any of the following stores or from the following brands this holiday season? Please select all that apply. <i>Coded 'other' included</i>	US
Amazon	69

Walmart	58
Target	38
Kohl's	34
Best Buy	28
Toys R Us	27
JC Penny	24
Macy's	24
Kmart	13
Sears	13
Apple	9
Nordstrom	6
eBay	1
Other	6
None of the above	5

<b>What percentage of your holiday shopping will be done online?</b>	<b>All</b>	<b>US</b>	<b>UK</b>	<b>CA</b>
None	6	4	6	10
Less than 10%	11	10	6	16
10 – 25%	18	17	12	23
26 – 50%	26	27	25	25
51% – 75%	21	24	24	12
76% +	11	11	19	5
Don't know	7	7	8	9

<b>What percentage of your holiday shopping will be done online? Asked only of Parents</b>	<b>All</b>	<b>US</b>	<b>UK</b>	<b>CA</b>
None	3	1	2	5
Less than 10%	9	7	4	16
10 – 25%	19	19	12	27
26 – 50%	31	33	31	28
51% – 75%	24	27	30	15
76% +	10	10	16	4
Don't know	4	3	5	4

<b>Do you plan to purchase gifts at any of the following stores or from the following brands this holiday season? Please select all that apply. Coded 'other' included</b>	<b>UK</b>
Argos	44
Marks & Spencer	30
eBay	28
Toys R Us	25
Next	20
Primark	19
Apple	16
Amazon	15
H&M	11
ASOS	8
River Island	8

Topshop	8
Zara	4
Maplin	3
Mango	1
Debenhams	1
John Lewis	1
Specific product/type of product/retailer (unspecific retailer): iPad / Apparel / Toy store, etc.	1
Other	5
None of the above	19

<b>Do you plan to purchase gifts at any of the following stores or from the following brands this holiday season? Please select all that apply. <i>Coded 'other' included</i></b>	<b>CA</b>
Best Buy	42
Toys R Us	34
Apple	18
Home Depot	15
Lululemon	7
Walmart	6
Amazon	5
Holt Renfrew	5
Lowes	5
Puma	3

Browns	2
Sears	1
Structube	1
Costco	1
The Bay	1
Winners	1
Multiple places/stores (unspecific)	1
Other	6
None of the above	24