



**CIVIC
SCIENCE**

2014 Holiday Shopping Season Insights

An Insight Report by CivicScience

January 2015

The following mega-report is actually a collection of insight reports and blog reports published by CivicScience from September 2014 – January 2015 as part of the retail holiday shopping season. The data were collected from our enterprise platform for real-time and trended consumer insights, the InsightStore™, using syndicated (non-client) polling questions, which allowed us to quickly view and analyze the results, including cross-tabulating the data with other response data in our massive database. Tens of thousands of consumers in total contributed to these findings.

Our predictive data aligned extremely well with what the industry reported for retail sales during this past season – particularly around Black Friday sales and healthy growth in online shopping. We also provided deeper, persona-based profile insights into the various types of online shoppers as seen through difference lenses.

Included are insights about:

- Consumers' holiday spending budgets
- Personas of holiday shoppers based on when they shop
- Thanksgiving and Black Friday shopping intent
- Cyber Monday shopping intent and device preferences
- In-store vs. online shopper segment comparison
- Sentiment on the in-store shopping experience
- Credit card usage intent given recent retail data breaches

We hope you enjoy the collection of insights – and invite you to get a live, personalized demo of the InsightStore™ and our methodology to evaluate for your 2015 MR needs.

Will You Spend More, Less, or the Same This 2014 Holiday Season?





Published: September 19, 2014

Despite U.S. consumers having higher overall confidence levels in the economy and personal finances now than they did a year ago (see our ongoing [Economic Sentiment Index](#)), 77% of consumers say they will be spending the same or less this coming holiday shopping season. Only 13% say they plan to spend more. This is not great news for retailers.

Do you expect to spend more or less on gifts this holiday season than you did last year?

> All Respondents

> Weighted according to U.S. Census figures for gender and age, 13 and older

More this year	3,316	13%	
Less this year	9,529	37%	
About the same	10,344	40%	
I won't spend any money on gifts	2,453	10%	

Margin +/- 1% 25,642 responses from 08/19/2014 to 9/19/2014

Who will be spending what?

- **Men** are slightly more likely to say they won't spend any money on gifts.
- **Younger consumers** (aged 13-34) are more likely to say they will be spending more. Two possible factors here: Younger consumers typically see their incomes climb post college graduation, and we also find in our Economic Sentiment Index that younger consumers overall have been showing higher levels of economic confidence than older consumers.
- Indeed, those who have lesser levels of concern about the economy and jobs correlate with higher likelihoods of spending more this coming 2014 holiday season. **Those who say they are “not concerned at all” about the economy and jobs are 80% more likely to say they'll spend more this year.**
- **Non-parents** are 31% more likely to say they'll be spending more than parents and grandparents. (This is also somewhat of a proxy for age.)
- **Parents**, meanwhile, are 14% more likely to say they will cut back this year, compared to grandparents and non-parents.
- Those who classify themselves as **“spendthrifts”** — having difficulty controlling their spending — are 50% more likely than other spending types (such as tightwads) to say they'll spend more this season than last season.

With less than 14 weeks until Christmas, retailers still have time to adjust and adapt to this vital information about consumer intent.

Profiling the Various Holiday Shoppers

Published: October 14, 2014

Retailers are in holiday mode, stocking shelves, hiring additional employees, and gearing up their holiday marketing and advertising. According to The National Retail Federation, sales are expected to increase 4.1 percent to \$616.9 billion during the 2014 holiday months of November and December. This is good news for retailers, but they will still need to provide shoppers with targeted promotions in order to incent consumers to spend money, and we have data that will be of value when trying to target and promote those last-minute campaigns.

Our latest Insight Report focuses on who will be shopping this holiday season and when they will begin their shopping. CivicScience asked consumers the following question:

“When it comes to shopping for the winter holidays, what best describes you?”

- I shop early – most of it is done before end of summer
- I shop throughout the entire year and spread it out
- I start shopping in the fall
- I wait until the big sales start (i.e. Black Friday)
- I am a last-minute shopper within the weeks prior
- I don't shop for these holidays

By cross-tabulating respondents against thousands of other CivicScience syndicated questions, we were able to go beyond basic demographics and find psychographic profiles of the different shoppers based on how they responded to the question. The report focuses on three different segments:

- ✓ **Fall shoppers** or those who answered with “I start shopping in the fall”
- ✓ **Thanksgiving shoppers** or those who answered “I wait until the big sales start...”
- ✓ **Last-minute shoppers**, those who answered “I am a last-minute shopper within the weeks prior”

Here's a look at some of the insights we found when comparing the three different shopping groups and the general population:

Marketing/advertising in the fall should be geared more towards middle-aged women, keeping in mind that 72% are 35+ years old and over half (54%) are over 45 or older. 62% have children or grandchildren who they will most likely be shopping for. When it comes to social media, 52% are on Facebook, which is less than the general population, however, they are more likely than the general population and other groups to be on Twitter. 51% say TV ads influence their purchasing behavior most (vs. Internet ads or social media comment feeds). Lastly, fall shoppers are more likely to consider themselves tightwads and have trouble spending money.

Marketing around Thanksgiving, Black Friday and Cyber Monday should be focused slightly more on women. Although the Thanksgiving or sale shopper is more likely to be 24 and under and slightly more likely to be 35-44 years old, the majority (51%) are 25-54 years old. There is a parental status split; 39% have

children, but no grandchildren and 39% are not parents. 41% of Thanksgiving shoppers have school-aged children living with them, which is about 37% more likely than the general population and other groups. Overall, shopping seems to be important to this group. They are more likely to be brand loyal, consider themselves spendthrifts and are more likely to be early adopters. Instagram is more popular among this group than the other shoppers.

Marketing during the week or two before the holidays will see a very different shopper in stores. Men are more likely to start their shopping during this time (this probably comes as no big surprise to retailers). Last-minute shoppers are more likely than the other groups to be 25-34 years old and are more likely than average to be 45-54. 35% have children, which is slightly more than average, however, 43% do not have children or grandchildren, which is more than the other groups. When it comes to regularly watching TV shows online, they are 2.5X as likely as the other shopping groups to watch online. Among the three shopping groups, last-minute shoppers are the most likely to be employed.

This data will help arm retailers with the information needed to alter advertising and marketing messages to appeal to the different shoppers.

[View the complete and detailed Insight Report. \(no login needed\)](#)

Consumers' Shopping Intent for 2014 Thanksgiving and Black Friday Sales Events

Published: November 24, 2014

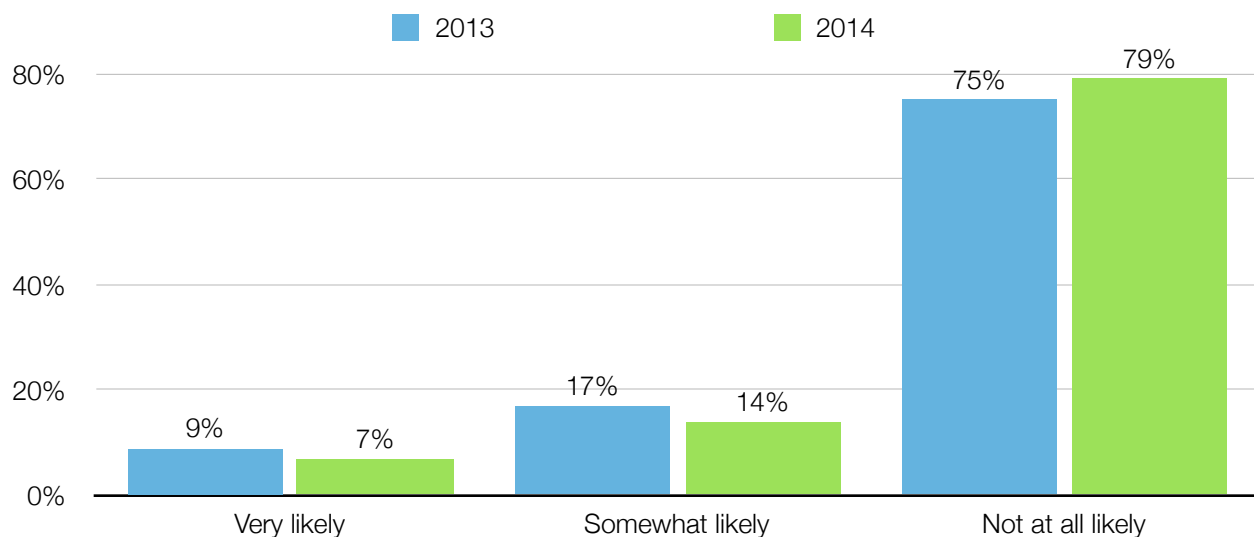
In recent years, the long Thanksgiving holiday weekend meant that the big shopping focus day was Black Friday, but as competitive retailers sought to grab wallet share earlier, the hours of operation have crept up towards Thanksgiving, compelling the retail industry to coin the term "Gray Thursday." This year retailers are opening even earlier on Thanksgiving Day than last year, but not without backlash from employees. One mall in New York is actually fining retailers that do not open their stores on Thanksgiving. Is this what consumers are demanding? And what types of products are most attractive to customers during these sales events?

Civicscience took to our polling platform to ask consumers about their shopping intent, spending plans, and thoughts on the largest holiday shopping weekend of the year. For this study, Civicscience polled over 21,200 U.S. adults between late October and mid-November 2014 on multiple Black Friday and Thanksgiving holiday shopping questions.

Black Friday 2014 Intentions:

The data shows 21% of U.S. adult consumers are considering shopping on Black Friday 2014. Of those, only about one third (35%) are very confident they will do so, while the rest (65%) say they are only somewhat likely to go shopping and may require some persuasion or other factors to get them into the stores.

How likely are you to go shopping on Black Friday?



Source: Civicscience, Inc. November 17, 2014. Respondents include a representative sample of U.S. adults, 18 years and older. 2013 data from 4,049 respondents collected from 11/04/2013 to 11/15/2013. 2014 data from 3,253 respondents from 10/31/2014 to 11/14/2014.

Slightly fewer consumers plan to shop on Black Friday this year compared to last year. In 2013 (posing the same question from 11/1/2013 to 11/15/2013 to 4,049 respondents), 26% of consumers said they were likely to shop on Black Friday, which means that U.S. adult consumers are 19% less likely to shop on Black Friday 2014 than last year.

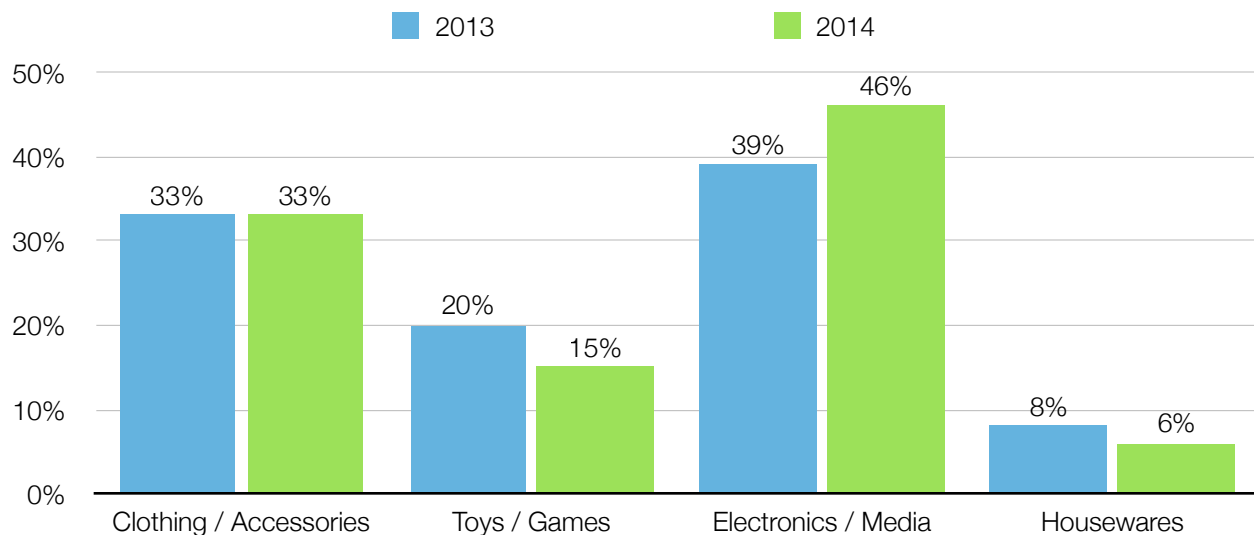
*Who are the likely **Black Friday 2014 shoppers?***

- 61% of likely Black Friday shoppers are women.
- 23% of likely shoppers are 18-24 while 37% are 35-54 years old.
- 59% have an annual household income of \$25K-\$100K.
- 23% love using Pinterest, which is over 2X as likely as average.
- 45% of likely shoppers have children, which is 25% more likely than average. Only 19% have children and grandchildren, which is 24% less likely than average.

Black Friday Product Category Spending Plans

Consumers plan to spend the most on **electronics/media** purchases (12%) and **clothing/accessories** (8%) during Black Friday 2014. Consumers are slightly more likely to say they are spending the most on electronics/media than they did last year at this time. They are 25% less likely to say they will spend the most on toys/games than in 2013.

On which of these do you expect to spend the most while shopping on Black Friday?



Source: CivicScience, Inc. November 17, 2014. Respondents include a representative sample of U.S. adults, 18 years and older. 2013 data from 3,597 respondents collected from 11/11/2013 to 11/15/2013. 2014 data from 3,253 respondents from 10/31/2014 to 11/14/2014.

Who will be spending the most on electronics/media?

- 13% more likely to be men than women.
- 40% are 35-54 years old and 22% are 18-24 years old.
- 31% more likely than average to have a household income under \$35K-\$50K. 61% have an income of \$75K and under.
- 45% are parents, but not grandparents, which is 27% more likely than average.
- 43% less likely to be grandparents than average.
- 44% more likely than average to go to the movies at least once a month.

Who will be spending the most on clothing/accessories?

- 70% more likely to be women than men.
- 53% are 18-29 years old.
- 61% more likely than average to have a household income under \$25K, which could be due to their age. 60% have an income of \$75K and under.
- 61% are not parents, which is 53% more likely than average.
- 43% less likely to be grandparents than average.
- 57% more likely than average to go to the movies at least once a month.







***** Bonus Insight – More Black Friday Shopping Will Happen Online *****

In less than 24 hours from November 24 afternoon to morning of November 25, we quickly polled over 2,000 U.S. adults about how much of their Black Friday shopping will be done in stores vs. online. Turns out, online will be more popular than in-store shopping this year: Of those planning to shop that day, only 23% will do the majority of it in stores. We see higher favor toward online shopping across nearly all age groups, except among those 55+.

How much of your Black Friday shopping will be done in stores vs. online?

> All Respondents

> Weighted according to U.S. Census figures for gender and age, 18 and older

I will do all of it in stores	93	5%	
I will do most of it in stores	100	5%	
I will do about half in stores, half online	109	5%	
I will do most of it online	192	10%	
I will do all of it online	148	7%	
I won't be doing any shopping on Black Friday	1,173	58%	
I don't know yet	196	10%	




Margin +/- 3% 2,011 responses from 11/24/2014 to 11/25/2014

Intention to Shop on Thanksgiving Day 2014

4% of U.S. adult consumers are very likely to go gift shopping on Thanksgiving Day 2014, with another 8% in a 'persuadable' category of saying they are somewhat likely. As with Black Friday shoppers, only about one-third are strongly certain they will shop on this holiday.

How likely are you to go shopping for holiday gifts on Thanksgiving Day?

- > All respondents in segment Country | US responding in the last month
- > Weighted according to U.S. Census figures for gender and age, 18 and older

Very likely	192	4%	
Somewhat likely	367	8%	
Not at all likely	3,856	87%	




Margin +/- 2% 4,415 responses from 10/31/2014 to 11/14/2014

Results to the question this year are almost identical to last year's number, so even though stores are opening earlier, the tactic doesn't seem to be growing the overall percentage of Thanksgiving Day gift shoppers.

Lastly, CivicScience asked consumers what they thought about shopping on Thanksgiving:

What do you think about shopping on Thanksgiving Day?

- > All respondents in segment Country | US responding
- > Weighted according to U.S. Census figures for gender and age, 18 and older

It's great. I'm going for the deals	95	3%	
It's great. I'm going for the experience	38	1%	
It's out of control but I'm still going for the deals	160	5%	
It's out of control but I'm still going for the experience	44	1%	
I won't be shopping on Thanksgiving	3,072	90%	

Margin +/- 2% 3,409 responses from 11/12/2014 to 11/19/2014

An overwhelming majority – 90% — have no plans to shop on the holiday. Among those planning to shop, “going for the deals” seems to be the biggest reason consumers will shop on the Thanksgiving holiday, representing 8% of respondents, while “going for the experience” is a draw to only 2%.

Summary

More consumers are planning to shop on Black Friday than Thanksgiving, however when compared to last year shopping intent has slightly decreased. Also, it doesn't seem that retailers' plans to open their stores earlier on Thanksgiving Day are persuading more consumers to shop compared to last year. Those who do plan to shop on Black Friday are going to be spending the most on electronics/media and clothing/accessories. It will be interesting to see how the Thanksgiving holiday weekend plays out and how the shopping holiday continues to transform in the future. [**Download this report as a PDF.**](#)

Cyber Monday Shopping Intent & Device Preferences

Published: November 26, 2014

More and more consumers are ditching shopping at brick-and-mortar stores and turning to online shopping during the holiday season. Based on a poll question CivicScience developed that collected 2,023 responses from November 19, 2014 to November 25, 2014, we found that of the consumers who plan to shop this holiday (throughout the whole holiday shopping season), 31% of people plan to do more than 50% of their shopping online while only 26% don't plan to do any shopping online. Cyber Monday is a big online holiday shopping day and sales that day are expected to rise 15%, showing steady growth since last year.






To learn more about Cyber Monday shopping intent, the devices consumers plan to use for their purchases, and who plans to shop that day, CivicScience polled over 7,400 adult consumers from 11/19/2014 to 11/25/2014 on three different questions. Overall, across the three Cyber Monday related questions we asked, we found that about 29%-32% of adult consumers intend to shop that day.

Overall, consumers plan to shop more on their smartphones or tablets this Cyber Monday compared to last year. Of those that intend to shop on Cyber Monday (excluding those who won't be shopping or answered "What's Cyber Monday"), 12% of consumers plan to shop via their smartphone, 10% plan to use a tablet and 78% plan to use a computer.

How will you do the majority of your shopping on Cyber Monday?

> All respondents in the last 3 months

> Weighted according to U.S. Census figures for gender and age, 18 and older

On a smartphone	108	4%	
On a tablet	95	3%	
On a computer	704	24%	
I won't be shopping on Cyber Monday	1,702	57%	
What's Cyber Monday?	357	12%	

Margin +/- 3% 2,996 responses from 11/19/2014 to 11/24/2014

Last year, roughly 8% of consumers planned to use a smartphone, 8% intended to use a tablet and 84% planned to use a computer.

After grouping together those who plan to shop on their smartphone, tablet and computer, we were able to develop **a profile of the Cyber Monday shopper** and compare their demographic and psychographic attributes against the general population.

Demographics:

When compared to the general population, Cyber Monday shoppers are...

- 17% more likely to be women
- 29% less likely to be a grandparent
- 37% more likely to have a household income over \$75K
- 51% more likely to be 18-44 years old
- 11% more likely to have a secondary degree and more specifically 17% more likely to have a graduate degree or PhD
- 20% more likely to live in the suburbs
- 21% more likely to be currently employed

Shopping Habits and Behaviors:

When compared to the general population, Cyber Monday shoppers are...

- 35% more likely to be brand loyal due to the brand's quality
- 22% less likely to say price is more important than brand when shopping for clothing/accessories
- 18% more likely to say price and brand are equally important when shopping for electronics
- 45% more likely to do at least half of their shopping online
- 29% more likely to get their fashion inspiration from movies
- 50% more likely to say fashion trends impact what they wear
- 16% more likely to be influenced most by ads on TV rather than on the internet or social media comments, which is interesting given their younger age

Health and Wellness:

When compared to the general population, Cyber Monday shoppers are...

- Over 2X as likely to own new home gym or exercise equipment
- Slightly more likely to eat at fast food (14%) and fast casual restaurants (40%)
- 21% more likely to say they eat healthy
- 69% more likely to value lower prices when dining out

Social Media Usage:

When compared to the general population, Cyber Monday shoppers are...

- 16% more likely to use YouTube daily or weekly
- 24% less likely to use Facebook daily or weekly
- 31% more likely to use Twitter daily or weekly
- 19% more likely to use Pinterest daily or weekly

Technology Usage:

When compared to the general population, Cyber Monday shoppers are...






- 64% more likely to read technology blogs or websites daily
- 17% more likely to closely follow current events in electronics and technology
- Only 10% more likely to own a smartphone
- Only 9% more likely to own a tablet computer
- 40% more likely to read eBooks or digital books
- 34% more likely to own an eReader

Consumers are planning to spend the most money on **electronics/media** and **clothing/accessories**, both of which are up slightly from last year's numbers. Of those planning to shop on Cyber Monday, roughly 40% will be spending the most on electronics or media and 36% will spend the most on clothing or accessories. Toys/games and housewares spending this year is the same as last year.

On which of these do you expect to spend the most money shopping on Cyber Monday?

> All respondents in the last 3 months

> Weighted according to U.S. Census figures for gender and age, 18 and older

Clothing / accessories	304	11%	
Toys / games	139	5%	
Electronics / media	340	12%	
Housewares	58	2%	
I won't be shopping on Cyber Monday	2,015	71%	




Margin +/- 2% 2,865 responses from 11/19/2014 to 11/25/2014

In September of this year, CivicScience produced [reports on what matters most to consumers when shopping in stores and online](#). We found when shopping for clothing or shoes online, consumers value variety/selection followed by convenience. When shopping for personal electronics online, consumers value the ease of price comparisons and access to reviews. Between this information and how consumers plan to shop on Cyber Monday, i.e. what devices they plan to use to shop, retailers can develop a holiday game plan that allows them to better cater to consumers.

When consumers were asked about their likeliness to shop on Cyber Monday, a total of 32% of adult consumers are likely to shop that day. Of those planning to shop, 31% are “very likely” to shop on Cyber Monday and 69% are somewhat likely to shop, which is nearly identical to last year’s shopping likelihood.

How likely are you to shop on Cyber Monday?

- > All respondents in the last 3 months
- > Weighted according to U.S. Census figures for gender and age, 18 and older

Very likely	161	10%	
Somewhat likely	358	22%	
Not at all likely	1,081	68%	

Margin +/- 3% 1,600 responses from 11/19/2014 to 11/25/2014

Recap

The Cyber Monday shopper is more likely to be a younger woman with a higher education and higher income. Although they are interested in electronics and technology, it seems the group is not overly tech savvy compared to the general population, based on some of their behaviors and device ownership. However, they are more likely to shop online. Compared to last year, more consumers will be shopping on their smartphones and tablets this year.

Holiday Shopping – Online or In Store?

Published: December 11, 2014





This year we saw a lackluster Black Friday. According to the National Retail Federation, total spending over the long Thanksgiving weekend decreased 11% from 2013. Cyber Monday on the other hand saw one of the best online spending days ever. ComScore Inc. reported that Cyber Monday sales increased 17% from 2013. It seems that more consumers are taking advantage of online shopping over the holidays.

We turned to our polling platform and asked consumers where they plan on doing most of their holiday shopping this year, online or in stores. Overall, of the people planning to shop this holiday season, 56% of adults plan to do most of their shopping in stores while 44% of adults plan to do most of their shopping online – through a mix of both store-specific websites or web-only retailers, such as Amazon.com.

Where do you plan on doing the most of your shopping this holiday season?

> All respondents on or after 9/1/2014

> Weighted according to U.S. Census figures for gender and age, 18 and older

At actual stores such as my local Target or Barnes and Noble	2,675	43%	
Online through store specific websites such as target.com	697	11%	
Online through Web only retailers such as amazon.com	1,409	23%	
I don't plan on doing any holiday shopping this year	1,440	23%	

Margin +/- 2% 6,221 responses from 10/07/2014 to 12/04/2014

We segmented the data to create profiles of those who plan to shop in stores, those who plan to shop online through store-specific websites, and those who plan to shop online from web-only retailers. By looking at a wide range of other questions that this group of 6,221 respondents have answered over time, here's what we found.

Demographics of In-Store vs. Online Shoppers:

	In Stores	Online through store specific websites	Online through web only retailers
Gender: Female	55%	61%	no gender difference
Gender: Male	45%	39%	
Age: 18 - 34	30%	26%	34%
Age: 35 - 54	37%	42%	39%
Age: 55+	33%	32%	26%
Income: \$75K and under	68%	63%	60%
Not a parent	37%	33%	46%
Education: Associate degree or higher	50%	49%	62%

Those planning to do the majority of their shopping in stores are slightly more likely to be women and the majority (68%) have a household income of \$75K or under, which is more than the other two shopping groups. Those who are planning most of their shopping online through store-specific websites are the most likely to be women when compared to the other groups, and they are also slightly more likely to fall into the 35-54 age bucket. Consumers planning to shop through web-only retailers are more likely to be younger (18-34), 46% do not have children, and they are the most likely to have a higher education.

Aside from the basic demographics, we also dug deeper into each segment's shopping behaviors, their social media usage and their technology usage.

Shopping Behaviors:

	In Stores	Online through store specific websites	Online through web only retailers
Waits in line as long as it takes	36%	32%	27%
Uses coupons at every chance when shopping for non grocery items	26%	24%	14%
Price is more important than brand	35%	38%	41%
Always compares prices before making a purchase	41%	34%	48%
Most influenced by ads on TV	62%	53%	50%

The shoppers who plan to do the majority of their purchases in a store are more likely to wait in line as long as it takes – 36% don't mind the wait. This group is also slightly more likely than the other shoppers to use coupons every chance they get when shopping for non-grocery items.

Those who plan to shop online through store specific websites are the least likely to compare prices before making purchases, which is a little surprising since online shopping makes it easy to compare prices. But since these shoppers are more loyal to shopping on a specific brand's website, price is less of a factor.

Consumers who plan to do the majority of their shopping through web-only retailers are the least likely to use coupons but are the most likely to compare prices before making purchases. This group is also slightly more likely to say price is more important than brand when shopping, so they are very interested in getting the best deal.

All of the shoppers are most influenced by ads on TV rather than Internet ads or social media; however, those planning to shop in stores are the most likely to be influenced by ads on TV.

Social Media Usage:

	In Stores	Online through store specific websites	Online through web only retailers
Love using Pinterest	11%	21%	11%
Love using Instagram	14%	23%	11%
On Facebook	58%	79%	55%

Those planning to do the majority of their shopping online through store-specific websites are more likely than the other groups to be on social media. 21% love using Pinterest, 23% love using Instagram and 79% are on Facebook, which is at least 36% more likely than the other shoppers.

Technology Usage

	In Stores	Online through store specific websites	Online through web only retailers
Owns a smartphone	54%	68%	76%
Owns a tablet	44%	38%	47%
Owns an eReader	21%	39%	35%
Addicted to digital devices	37%	57%	43%
Reads tech blogs / websites daily or weekly	19%	27%	43%

Those who plan to do most of their shopping online through web-only retailers are more likely to own a smartphone and tablet computer, but those planning to shop online through store-specific websites are slightly more likely to own an eReader. What's surprising is that those shopping through store-specific online retailers are much more likely to say they are addicted to their digital devices, even though the online web-only retailer shoppers seem to have a higher device ownership rate and keep up with technology news more often.

Lastly, we looked into those who don't plan to shop this holiday season and found they are more likely to be men, 54% are 45+ years old, 72% have an income of \$75K or under, they have a lower education when compared to the other groups, and 45% don't have any children. They are more price conscious when compared to the other groups. This group is more likely to say price is more important than brand when shopping and they are slightly more likely to always compare prices before making purchases. Those who don't plan to shop this holiday are the least tech savvy bunch, which is evident from their lower device ownership rates and lower likelihood of keeping up with tech news.

Although the majority (56%) of adult consumers still intend on doing the bulk of their holiday shopping in stores, more people seem to be taking advantage of the online shopping experience, with 44% of adults planning to do the majority of their shopping online. When online shopping, web-only retailers, such as Amazon.com will see the most traffic, followed by those who plan to shop on store-specific websites. Retailers may continue to see more of a shift from in store shopping to online shopping around the holidays.

In [a report published today by our partner The NPD Group](#) highlighting CivicScience data, only 21% of consumers enjoy in-store holiday shopping – and younger consumers are surprisingly more likely to enjoy the experience. As NPD's chief industry analyst Marshal Cohen states: "In order to maintain relevance in an increasingly competitive omnichannel environment, retailers will want to emphasize their value to younger consumers. Focusing on gaining loyalty from these younger shoppers is important."

Dislike for Holiday Store Shopping May Drive Up More E-Tailing

Published: December 17, 2014

The best technology breakthroughs are those that clearly alleviate “pain” that exists in some form or other. Online tax software. Social media, so that we can scale communication and keep in touch. Online and mobile banking. And, e-commerce. The ability to shop online for an ever-broadening list of product categories makes this time of year much merrier for many – and 2014 is extremely merry for online retail.

This year, we saw even greater blurring of the sales event (soon-to-be-formerly) known as Black Friday – as retailers seek to trump each other by moving their in-store sales earlier and offering deals across longer periods of time. Partly because of these sales time-frame extensions, this year’s Black Friday/Thanksgiving weekend spending dropped 11% compared to 2013, says the National Retail Federation. Our consumer intent data predicted this.

Despite those blurred lines, Cyber Monday this year was the biggest e-commerce day ever. Consumers seem eager to continue to move more holiday spend online; a report we recently published with our partner The NPD Group found that **27% of U.S. adult shoppers plan to do as much of their holiday shopping as possible online this year**. Our data also found that 29% of consumers expect to conduct more than half of their holiday-related shopping online.

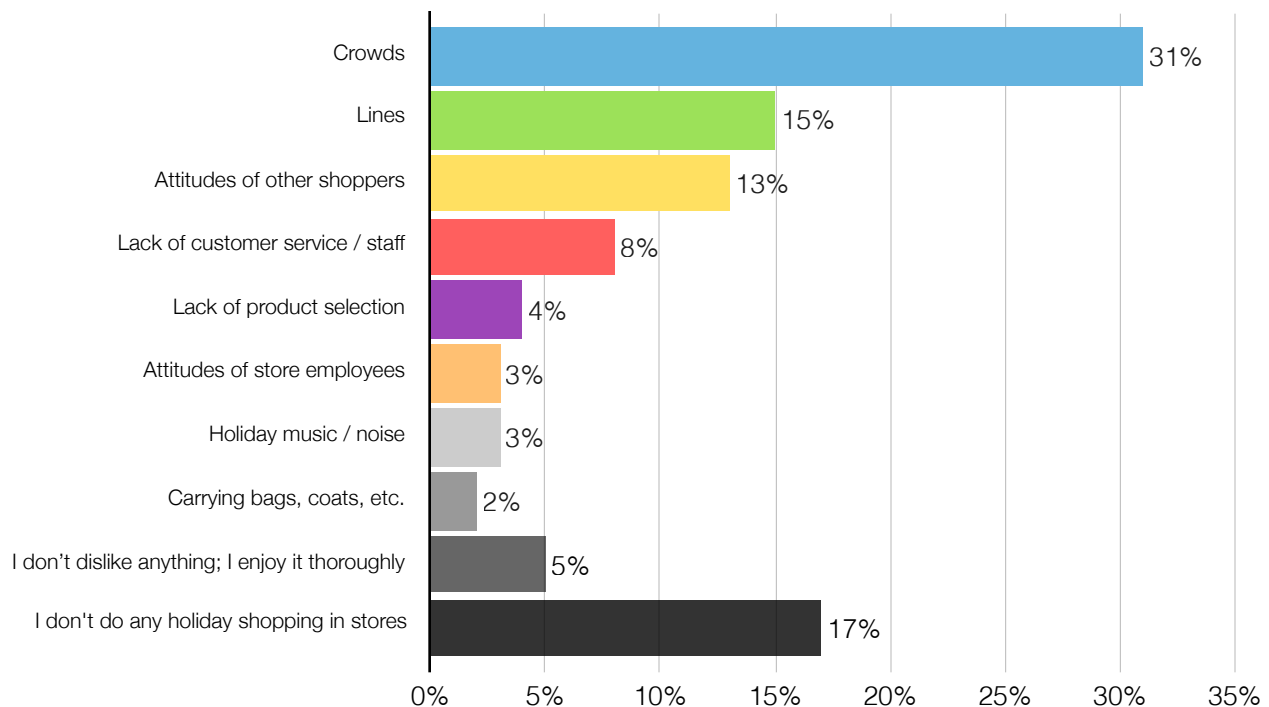
And this is happening despite widely-publicized credit card and customer data security breaches in the past 12 months at retailers including Target, Home Depot, and Bebe.

Why such growth amidst headline-making risks?

To simply state a statistically meaningful and recurring correlation: Most consumers don’t enjoy shopping in stores around the holidays. And let’s face it, online shopping has become so.... easy. From our above-cited study with The NPD Group, we found that in addition to the 27% who are shifting as much spend as possible to online shopping, another **36% say they either “tolerate” or “don’t like” holiday shopping in stores** and try to make as few trips as possible. And 17% of consumers simply don’t do holiday shopping.

We wanted to get more specificity around consumers’ distaste for in-store shopping during the holiday season, so we asked them to select what aspect of it they dislike the most. Among 2,277 U.S. adult respondents, here are the top picks and some insights on who is more likely to choose leading answers:

What do you dislike most when it comes to holiday shopping in stores?



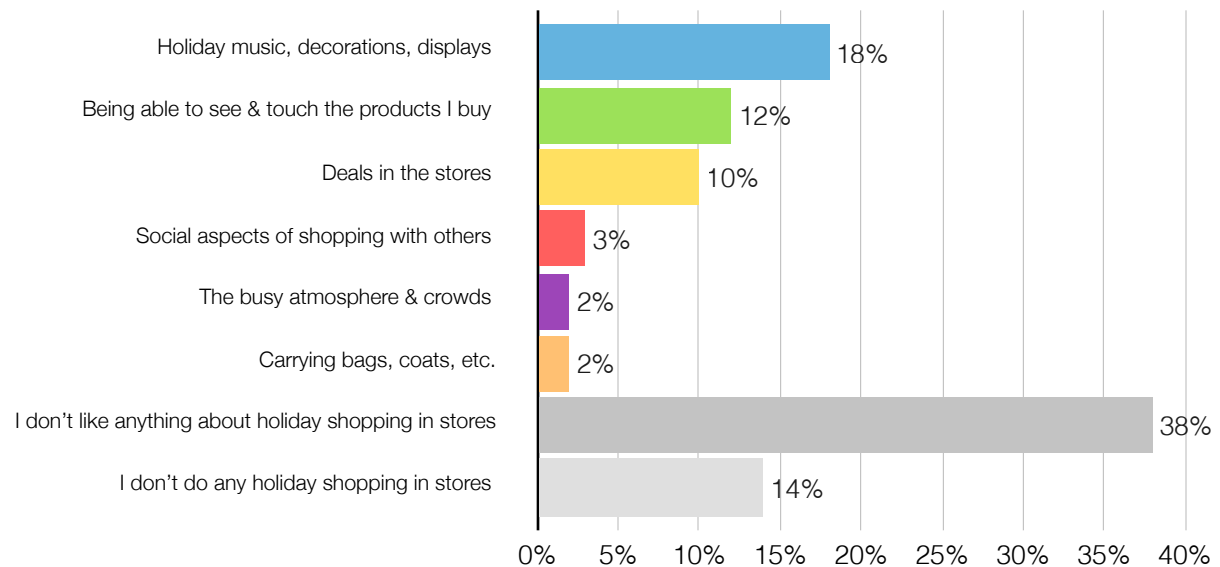
Source: CivicScience, Inc. web poll of 2,277 U.S. adults (18+) from 12/05/2014 to 12/10/2014. Weighted for U.S. Census representativeness for gender and age. Reported percentages may not sum to 100 due to rounding. Margin +/- 3%

It seems that even some of the in-store shopping lovers can still pick something they dislike the most about the experience; true fans with no bone to pick number only 5% of respondents.

- **Crowds:** Those 30-39 years old are 39% more likely to say Crowds than the average. Those making over \$150,000 per year in annual household income are somewhat more likely than other income groups to pick this. When it comes to holiday shopping, these respondents are more likely to make only one big trip to “get it all done at once.”
- **Lines:** This choice is fairly age-neutral, but with a strong gender split; 68% of these respondents are women. (Women also make up 74% of respondents who picked “Carrying bags, coats, etc.”) The Lines group is more likely to earn \$75K-\$100K per year. They are 81% more likely than the average to go to the movies on a monthly basis. And when it comes to their holiday shopping trips, they are much more likely to say they make “too many to count.”
- **Lack of customer service/staff availability:** These respondents are more likely to be over age 55. They are more likely to be spendthrifts vs. tightwads, meaning they have more difficulty controlling their spending. And they are more likely to make 4-5 trips when it comes to holiday shopping.

But granted, not everyone dislikes holiday shopping in stores and we don't want this post to be Grinch-y. In fact, 21% of consumers from our study with The NPD Group said that they "love" or "mostly enjoy" going. So we asked a specific question: what did over 9,000 U.S. adult consumers say they like the most about the experience?

What do you enjoy the most when holiday shopping in stores?



Source: CivicScience, Inc. web poll of 9,246 U.S. adults (18+) from 12/10/2014 to 12/17/2014. Weighted for U.S. Census representativeness for gender and age. Reported percentages may not sum to 100 due to rounding. Margin +/- 2%

You see that the in-store shopping "haters" number (38%) is pretty consistent with our other poll study (36%), as is the percentage of those who don't shop for the holidays in stores. Among those who remain, these are the top likes:

- **Holiday music, decorations, displays:** So the festive "ambiance" seems to be the leading choice in making the activity more enjoyable. Respondents for this answer are 63% women and are more likely to be 30-34 years old. When they holiday shop, they tend to make at least 4 separate trips to the stores. Interestingly, they are more likely to say that traveling is a passion of theirs (so taking in the sights would seem to be of high interest to them in general).
- **Deals:** Those aged 18-24 index 50% higher than average for this choice. These respondents are 68% women. They tend to make 2-5 trips when it comes to holiday shopping in stores. The deal fans are more likely to love to bake. They are also big on using their smartphones: they are more likely to buy and download mobile apps and games and to frequently use their devices to research purchases.
- **Being able to see and touch the products:** While this answer was fairly representative across all age groups, it also biased towards women: 66% are female. This group also frequently uses their smartphones to research products they want to buy, and when it comes to holiday store shopping trips, they make "too many to count."

So what's a bricks-and-mortar retailer to do?

Based on these consumer insights, we have some holiday food for thought:

Play up the **benefits** of the in-store shopping experience that are highlighted by what consumers do like (physical interaction with the product, in-store only deals) – and make that experience better for the customer. Find ways to improve their service experience, expedite lines, and manage crowds or crowd perceptions. [NPD's expert analyst Marshal Cohen has some great thoughts on this topic.](#)

Dress up your store – Create displays that have appeal and potentially spread word of mouth. Locally-focused retailers may even wish to engage their communities, such as by having students co-design displays or contribute crafted decorative items. Book some a cappella singers. In general, give shoppers conversation pieces and a chance to hit pause on the hassled shopping experience.

Increase the service touch – Having a member (or members) of the team assigned to keep a pulse on shopper mood could go a long way, especially in very large stores and/or if the crowds or lines start to ramp up. This may have highest pay-off if directed at older shoppers (55+).

Leverage omni-channel strategies – Retailers who also have an e-commerce site can use that channel to drive in-store traffic, such as by offering special deals, “trunk shows” or preview events, and other tactics to bring shoppers into the physical store.

As noted, we are not proving causal effect between in-store shopping sentiment and e-commerce, nor do we suggest it is the only factor, but there is an undeniably strong correlation between these two areas of study.

At any rate, we've only 8 days left to Christmas Day. And [we've already used our data to do a mini-profile on the more-likely “last minute” holiday shopper.](#) With the growing popularity of online shopping during this time of year, those who hit the stores in these remaining days may see less of the crowds and lines that they so dislike.

But their experience may determine what they do at this time in 2015.

Retailer Security Breaches – Any Effect on 2014 Holiday Shopping?

Published: January 15, 2014

Within the past year, consumers have experienced numerous data breaches at major retailers. During the 2013 holiday season, [Target announced a credit card breach](#) in which credit and debit card information was stolen, affecting 70 million to 110 million consumers. In September 2014, Home Depot experienced a similar data breach which potentially affected 56 million consumer credit and debit cards. In late October 2014, it was reported that a handful of Staples stores also experienced a [payment card data breach](#).

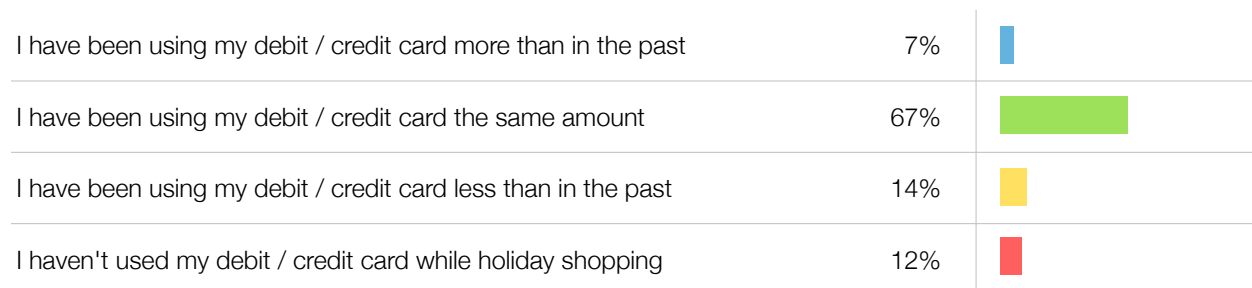
We turned to our polling platform to find out if the data breaches had any effect on consumers' 2014 holiday shopping, specifically in their use of debit or credit cards. From 12/15/2014 to 12/17/2014, we polled 2,329 consumers, 18 years and older, who planned to shop and who have already started their holiday shopping at that time. We found the majority of adults used their debit and credit cards the same as in the past.

67% of consumers said they have been using their debit/credit card(s) the same amount, 14% have been using their debit/credit card(s) less than in the past, 7% have been using them more than in the past, and 12% haven't used their debit/credit card(s) at all while holiday shopping.

Have you used your debit / credit cards less while holiday shopping this year due to the 2014 security breaches at major retailers?

> All respondents

> Weighted according to U.S. Census figures for gender and age, 18 and older



Margin +/- 3% 2,329 responses from 12/15/2014 to 12/17/2014

When news of the data security breach at Home Depot broke in September, we asked consumers if the recent hacks would affect their holiday shopping plans. Consumers' intent (which is below) is much different than the question results from above, which reflects consumers' actual behavior. Right after the incident took place, consumers were more prone to say they would not use their credit or debit cards while holiday shopping or they would use them less than in the past.

Of the 2,676 adults that were familiar with the hack at the time and chose how it would affect their holiday purchases (excluded those who responded “I’m not sure how this will impact my use of credit cards when I’m out shopping”):

- ✓ 44% of consumers planned to use their credit card as much as they have in the past, compared to the 67% of consumers who were asked more recently about their holiday purchasing behavior.
- ✓ 32% planned to not use their credit card at all while shopping.
- ✓ 22% of consumers planned to use their credit card less.
- ✓ Only 2% planned to use their card more.

Given the recent credit card / data hacks at major retailers, which of the following best captures how you plan to shop as the holidays approach?

- > All respondents
- > Weighted according to U.S. Census figures for gender and age, 18 and older



Margin +/- 2% 2,676 responses from 9/5/2014 to 10/15/2014

It’s no surprise that right after the Home Depot hack took place consumers would be weary of using their credit cards around the holidays. However, when asked how they were actually using their payment cards while shopping, it turns out that the past data breaches didn’t have a negative effect on consumers’ card usage while holiday shopping.

Holiday Credit Card Usage Comparison:

	Card Usage Plans 9/5/14 - 10/15/14 Poll	Reported Card Usage 12/15/14 - 12/17/14 Poll
Use / using their credit / debit card MORE	2%	7%
Use / using their credit / debit card the SAME	44%	67%
Use / using their credit / debit card LESS	22%	14%
DIDN’T use their credit / debit card at all	32%	12%

Well over half (67%) used their credit cards the same amount as usual, 14% used them less, 7% used them more, and 12% didn't use them at all, which could be due to lack of card ownership or maybe some consumers use them only in case of emergencies.

When looking at another question we have running, which focuses on how much people like to shop at Target, there was no significant change around and after the time of Target's data breach. Consumers' opinions remained pretty stable and it seemed that they weren't willing to change their shopping habits.

Consumers quickly change their minds and opinions, so having data that tracks consumer sentiment is an important piece of the puzzle. For some consumers, the convenience of using credit and debit cards may outweigh the potential risk. Either way this is why tracking consumers' opinions and behaviors are important. In this case, it doesn't seem the recent security breaches at major retailers changed consumers' use of credit and debit cards.

About the CivicScience Methodology:

CivicScience collects real-time consumer research data via polling applications that run on hundreds of U.S. publisher websites, cycling through thousands of active questions on any given day. Respondents are 100% voluntary opt-in with no incentives, compensation or coercion -- they answer just for fun and are kept anonymous, allowing for greatly reduce bias and higher levels of engagement. Respondents for this report were weighted for U.S. Census representativeness for gender and age, 13 years and older, and data was collected from January 1, 2014 through December 18, 2014. Using its technology, CivicScience builds deep, timely psychographic profiles of these anonymous respondents with each question they answer over time, providing valuable consumer sentiment and behavior insight data to the decision makers who care. The CivicScience methodology has been scientifically validated by a team of academic leaders and by independent research firms. CivicScience currently has more than 28.5 million anonymous consumer profiles stored, growing daily.

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