

*The*  
**BIG HONKIN',**  
*Tree Toppin'*  
**GLOBE TROTTIN'**  
**GUIDE**  
TO  
*Holiday Shoppers*

**2016**

**BASED ON INSIGHTS FROM  
SHOPPERS AROUND THE WORLD**

**FIELD AGENT®**

# TABLE OF CONTENTS

## CHAPTER 1: INTRODUCTION

- 3. HOLIDAY SHOPPING FORECAST: JOLLY
- 4. 2016 HOLIDAY SHOPPING INSIGHTS

## CHAPTER 2: THE WHERE & WHEN OF HOLIDAY SHOPPING

- 6. FAVORITE RETAILERS
- 7. THE WHEN OF HOLIDAY SHOPPING
- 8. PATH TO GIFT PURCHASES

## CHAPTER 3: ONLINE & IN-STORE HOLIDAY SHOPPING

- 10. ONLINE HOLIDAY SHOPPING
- 11. OLD FASHIONED, OMNICHANNEL CHRISTMAS
- 12. IN-STORE INFLUENCES WHILE SHOPPING
- 13. IN-STORE SHOPPING FRUSTRATIONS

## 14-20. BRAND MANAGER'S GUIDE

## CHAPTER 4: GIFTS GALORE

- 22. HOLIDAY SHOPPING FOR KIDS
- 23. HOLIDAY SHOPPING FOR THE "BETTER HALF"
- 24. MEN & WOMEN'S GIFT WISHES
- 25. OH CHRISTMAS TECH, OH CHRISTMAS TECH...
- 26. FILLIN' THE STOCKINGS
- 27. THE SKINNY ON GIFT CARDS

## CHAPTER 5: FOOD & BEVERAGES OF THE HOLIDAYS

- 29. EATING IN AT CHRISTMASTIME
- 30. EATING TAKEOUT AT CHRISTMASTIME
- 31. THE HOLIDAY PARTY SCENE
- 32. AROUND THE HOUSE

## 33-34. DEMOS & METHODS

## 35. WHAT'S IN-STORE THIS HOLIDAY SEASON?

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# HOLIDAY SHOPPING FORECAST: JOLLY

They say it's the most wonderful time of the year.

Especially *this year*; especially if you're a retailer or brand.

According to PricewaterhouseCooper's 2016 Holiday Outlook, the average holiday shopper is expected to dole out \$1,121 this year, amounting to an increase of some 10% over 2015 and the highest point for holiday spending since the Great Recession.

Mobile solutions firm Field Agent recently completed its own intensive look at the shopping attitudes and behaviors of holiday shoppers, and it appears there's only more reason to be cheery: Americans expecting to spend more this year, on everything from toys to groceries, outnumber those who say they'll spend less in those categories.

And not just in the United States either. Field Agent's research found shoppers around the world anticipate spending more this holiday season compared to last year:

	U.S.		AUSTRALIA		CANADA		MEXICO		ROMANIA		SOUTH AFRICA		U.K.		COMBINED	
	MORE	LESS	MORE	LESS	MORE	LESS	MORE	LESS	MORE	LESS	MORE	LESS	MORE	LESS	MORE	LESS
<b>Children's Gifts</b>	54%	11%	60%	11%	49%	13%	54%	10%	60%	13%	63%	10%	56%	15%	<b>57%</b>	<b>12%</b>
<b>Groceries</b>	45%	11%	52%	14%	42%	9%	50%	8%	25%	24%	66%	9%	60%	10%	<b>49%</b>	<b>12%</b>
<b>Toys</b>	38%	29%	46%	27%	39%	32%	57%	17%	52%	28%	63%	16%	40%	26%	<b>48%</b>	<b>25%</b>
<b>Electronics</b>	48%	23%	42%	17%	40%	22%	53%	25%	41%	31%	37%	23%	46%	20%	<b>44%</b>	<b>22%</b>
<b>Decorations</b>	35%	28%	36%	29%	28%	39%	36%	4%	33%	34%	33%	34%	N/A	N/A	<b>34%</b>	<b>31%</b>
	(N = 505)		(N = 300)		(N = 200)		(N = 75)		(N = 65)		(N = 120)		(N = 226)			

*Yes, the outlook for the 2016 holiday season is jolly indeed.*



# 2016 HOLIDAY SHOPPER INSIGHTS

Of course, all the positive prognostications mean little unless companies are prepared—*well* prepared—for the coming onrush of holiday shoppers. To this end, Field Agent recently surveyed close to 3,000 holiday shoppers across seven different countries. The report you’re reading is the culmination of this effort.

From the preferred retailers for purchasing Christmas gifts to the role of digital services (e.g., in-store pickup) in holiday shopping, this report offers an in-depth primer to help companies make ready for the critical weeks ahead.

“Companies call on us throughout Q4 to help with their research and in-store audit needs,” said Marc Yount, COO and president of Field Agent USA. “This report offers a glimpse of our capabilities and will equip readers with insights to prepare for holiday shoppers.”

Kids are making their wish lists, and adults are preparing their budgets. The holidays are just around the corner.

Let this guide make the holiday shopping season a little merrier for you and your company.

Field Agent, a mobile research and auditing company, crowdsources hundreds of thousands of smartphones to collect fast, affordable consumer insights and in-store information for leading brands and retailers.



# THE WHERE WHEN OF HOLIDAY SHOPPING

Shoppers potentially make thousands of decisions during the holiday season: The blue or green socks? Standard or express delivery? Cash or credit?

You'll find the questions *Where?* and *When?* among the most important decisions made by holiday shoppers. That is, "Where should I buy holiday gifts, groceries, etc. this year," and "When should I buy them?"

This section addresses the *Where* and *When* of holiday shopping. Field Agent queried consumers around the world about their favorite holiday retailers, the timing of their holiday purchases, and their in-store shopping behavior.

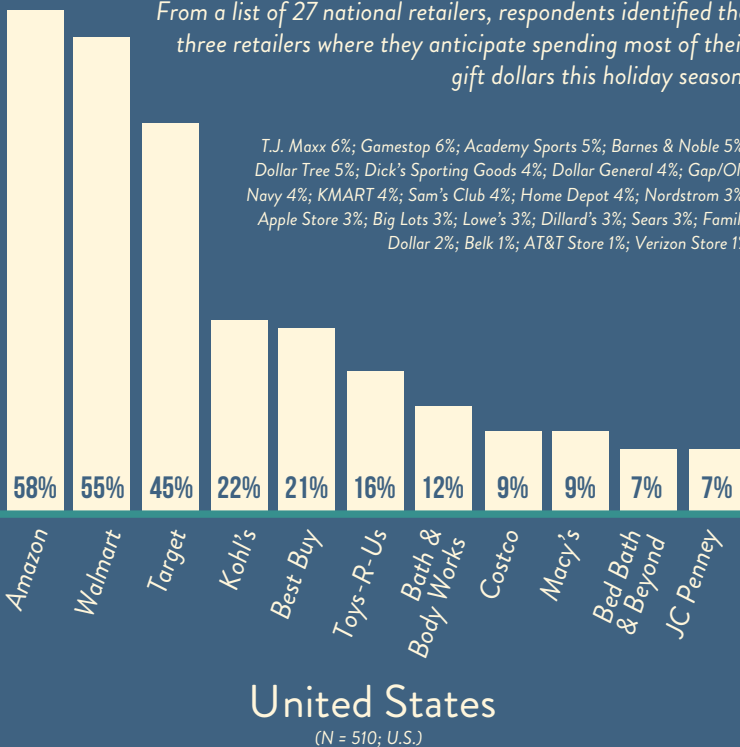
# FAVORITE RETAILERS



When purchasing holiday gifts this year, which 3 retailers will receive most of your business?

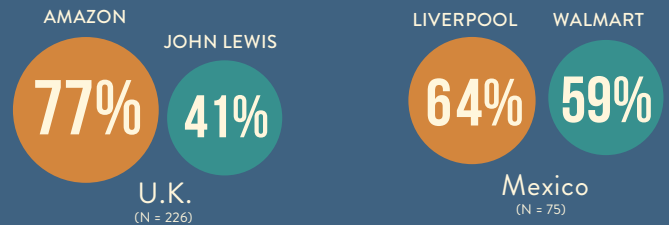
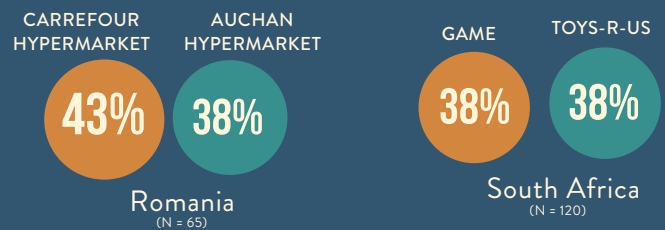
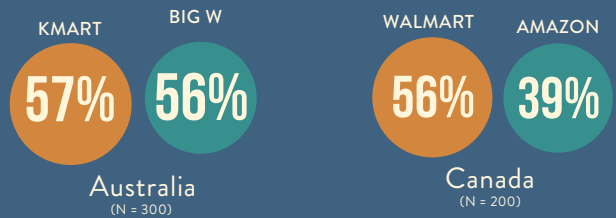
From a list of 27 national retailers, respondents identified the three retailers where they anticipate spending most of their gift dollars this holiday season.

T.J. Maxx 6%; Gamestop 6%; Academy Sports 5%; Barnes & Noble 5%; Dollar Tree 5%; Dick's Sporting Goods 4%; Dollar General 4%; Gap/Old Navy 4%; KMART 4%; Sam's Club 4%; Home Depot 4%; Nordstrom 3%; Apple Store 3%; Big Lots 3%; Lowe's 3%; Dillard's 3%; Sears 3%; Family Dollar 2%; Belk 1%; AT&T Store 1%; Verizon Store 1%



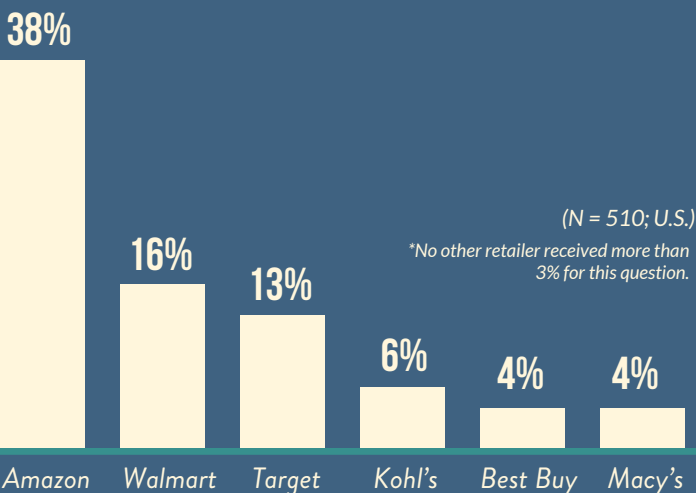
Field Agent asked holiday shoppers in seven countries to identify their main holiday retailers—specifically, the retailers that will receive most of their gift-buying business.

Here are the top 2 retailers by country:

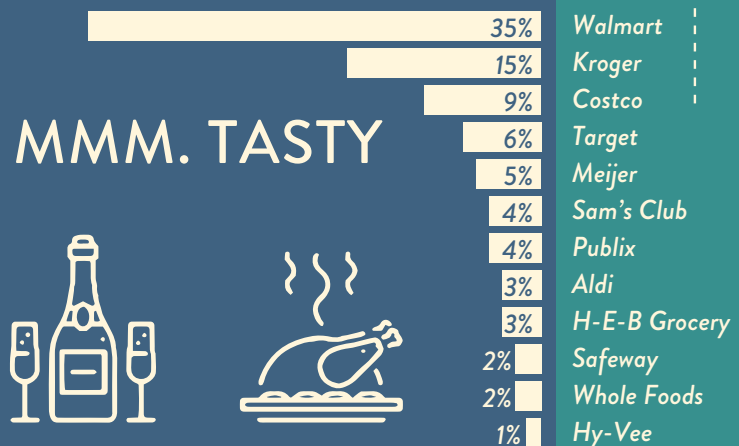


## THE ONE FAVORITE

Which ONE retailer is your favorite for purchasing holiday gifts?



When purchasing foods, snacks, beverages, and ingredients for your holiday celebrations this Christmas, which ONE retailer will receive most of your business?



# THE WHEN OF HOLIDAY SHOPPING

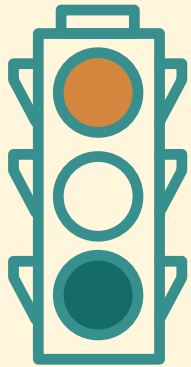
## Around the world, when do holiday shoppers buy their gifts?

Percentages reflect number of shoppers who said the option best describes them and their holiday shopping behavior.

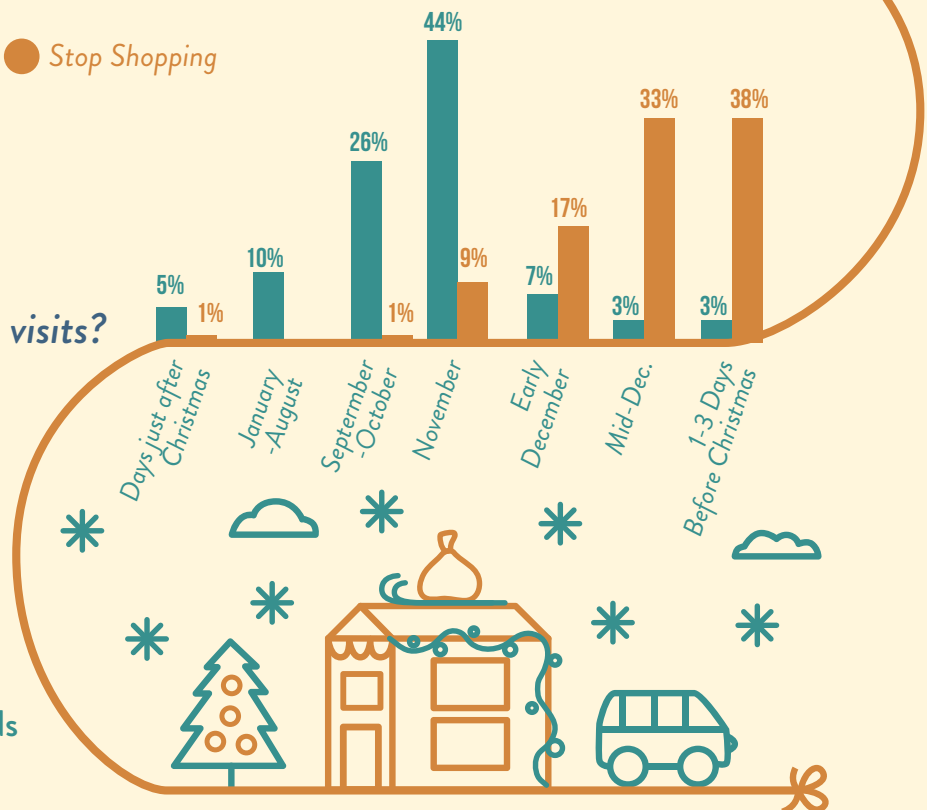
	U.S. (N = 505)	AUSTRALIA (N = 300)	CANADA (N = 200)	MEXICO (N = 75)	ROMANIA (N = 65)	SOUTH AFRICA (N = 120)	U.K. (N = 226)	COMBINED
Early to Mid-December	29%	40%	37%	40%	33%	45%	30%	36%
All-year shopper	22%	26%	27%	18%	23%	20%	28%	23%
Black Friday/Cyber Mon.	22%	N/A	8%	29%	13%	N/A	13%	17%
Falltime shopper (or springtime for AUS, S. AFRICA)	20%	24%	25%	5%	9%	10%	25%	17%
Last-minute shopper	6%	8%	4%	7%	22%	24%	4%	11%

## For this year, when will (or did) shoppers start and stop buying gifts?

(N = 510; U.S.)



● Start Shopping ● Stop Shopping



## Do shoppers pre-plan their holiday store visits?

(N = 510)

**44%** decide which stores to visit **DAYS** prior to visiting stores

**12%** weeks/months in advance

**35%** decide which stores to visit **AS** they're making the rounds



# PATH TO GIFT PURCHASES



## HOW MANY STORES DO HOLIDAY SHOPPERS VISIT?

**56%**

Will visit 5-10 stores

(N = 510; U.S.)

**13%**

Expect to visit more than 10

**1%**

Will visit just one store

## SPECIAL TRIPS OR SHOP-AS-YOU-GO?

**73%**

say they make special store trips to buy Christmas gifts exclusively

(N = 505; U.S.)

**27%**

pick up presents as they shop for everyday items

## WHICH ARE IMPORTANT AS YOU SHOP FOR HOLIDAY GIFTS?

Percentage who say the following are particularly important to their holiday gift purchases.

	U.S. (N = 505)	AUSTRALIA (N = 300)	CANADA (N = 200)	MEXICO (N = 75)	ROMANIA (N = 65)	SOUTH AFRICA (N = 120)	U.K. (N = 226)	COMBINED
Affordability/Low Cost	62%	80%	78%	79%	37%	69%	66%	67%
Product Quality	59%	61%	56%	67%	45%	51%	63%	57%
Surprising the Recipient	48%	52%	46%	44%	57%	34%	50%	47%
Being Perceived as Good Gift Giver	37%	52%	46%	66%	23%	33%	54%	44%
Sentimentality	40%	44%	40%	25%	31%	43%	45%	38%
Good Product Reviews	45%	36%	36%	33%	22%	19%	50%	34%
Purchasing Novel/Unique Gift	34%	39%	36%	21%	11%	30%	48%	31%
In-Store Convenience	32%	37%	28%	16%	12%	33%	29%	27%



# ONLINE IN-STORE HOLIDAY SHOPPING

PwC's 2016 Holiday Outlook projects a 25% increase in digital shopping this holiday season. 25%! It seems more and more are opting to “click” their way through the holiday shopping season. But even in-store holiday shopping is quickly becoming a more digital affair, thanks in large part to in-store and curbside pickup, smartphone apps, and the like.

In this section, **Field Agent** offers insight into the rise of digital holiday shopping, including the preferred websites for holiday purchases as well as the prevalence of online shopping and various omnichannel services.

Of course, the overwhelming majority of holiday shoppers will complete at least a portion of their purchases in stores this year. Thus, this section also features information on the attitudes and behaviors of shoppers toward in-store influences, before ending with an interesting discussion of holiday shoppers' top in-store frustrations.

# Online Holiday Shopping

## HOW LIKELY ARE YOU TO SHOP ONLINE THIS HOLIDAY SEASON?

Just how prevalent is online holiday shopping around the world? To find out, Field Agent surveyed almost shoppers 3,000 in seven countries.

	U.S. (N = 512)	AUSTRALIA (N = 300)	CANADA (N = 200)	MEXICO (N = 75)	ROMANIA (N = 65)	SOUTH AFRICA (N = 120)	U.K. (N = 226)	COMBINED
<b>HIGHLY LIKELY</b>	80%	59%	64%	66%	59%	45%	86%	66%
<b>MODERATELY LIKELY</b>	18%	31%	26%	16%	25%	26%	12%	22%
<b>NOT LIKELY</b>	2%	10%	12%	17%	17%	29%	2%	13%



## ONLINE VS. IN-STORE

**53%**

said they'll purchase most of their gifts **ONLINE** this year

(N = 510; U.S.)

## ONLINE

MORE OR LESS

+ / -

**67%**

said they'll shop **MORE** online this holiday season compared to last year

(N = 499; U.S.)

## TOP ONLINE RETAILERS OF THE HOLIDAYS

**71%**

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

12%

5%

4%

4%

3%

1%

Amazon Walmart Target eBay Other Best Buy ToysRUs

\*All stores are .com websites  
(N = 499; U.S.)

## FREE SHIPPING = MUST HAVE



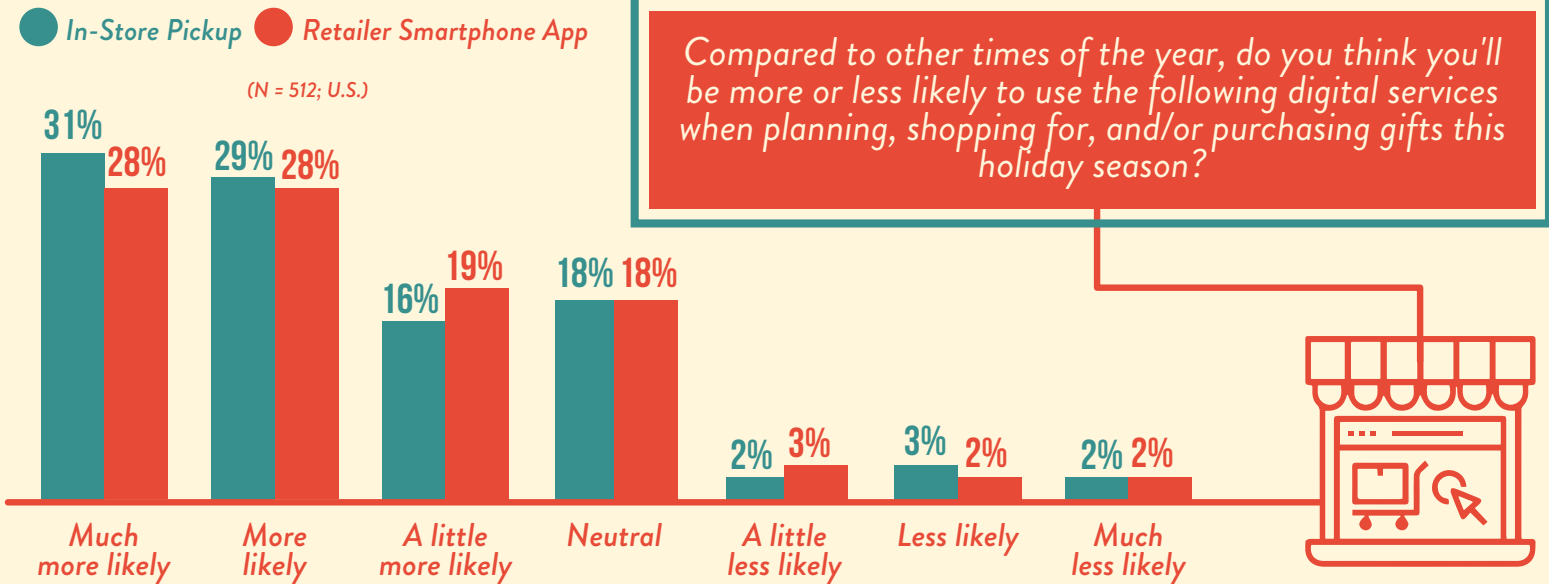
**68%**

(N = 499; U.S.)

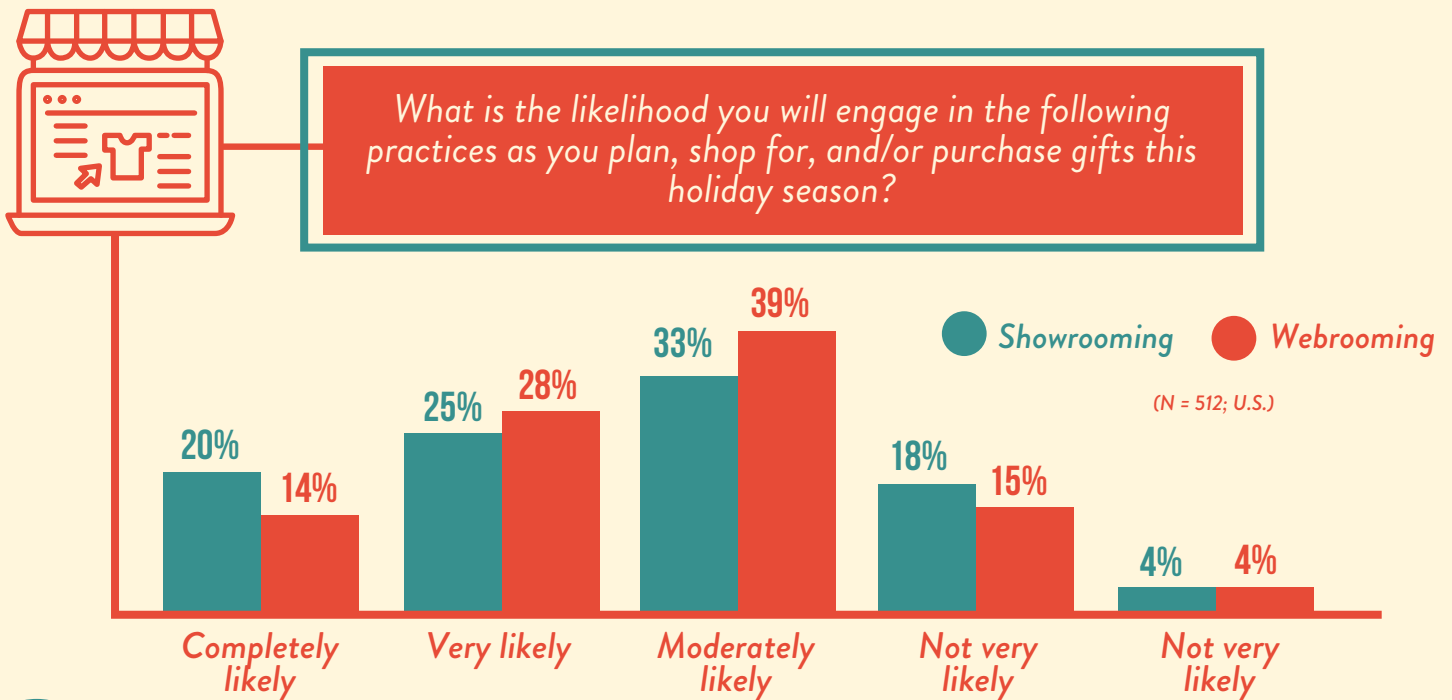
said free shipping is **EXTREMELY** important to their decision to shop online

# OLD FASHIONED, OMNICHANNEL CHRISTMAS

## IN-STORE PICKUP & RETAILER APPS



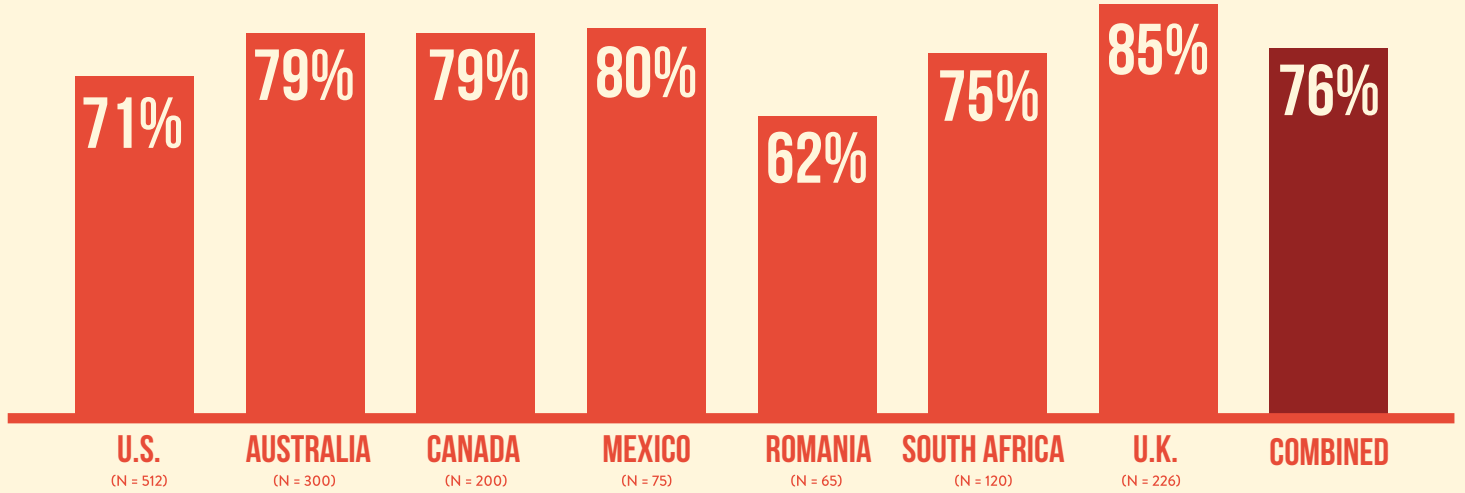
## SHOWROOMING VS. WEBROOMING



**SHOWROOMING = CONSIDER/SHOP FOR GIFTS IN STORES BUT BUY THEM ONLINE**  
**WEBROOMING = CONSIDER/SHOP FOR GIFTS ONLINE BUT BUY THEM IN STORES**

# IN-STORE INFLUENCES WHILE SHOPPING

Number of shoppers who find in-store, holiday grocery displays *at least moderately influential*



## PRODUCT DISPLAY Actual Agent Photo



29%

said in-store food and beverage **DEMOS** are extremely or very influential over their Christmastime grocery purchases, while 35% said they're moderately influential. (N = 509; U.S.)

## HOW DO HOLIDAY SHOPPERS RESPOND TO OUT-OF-STOCKS?

46%

said when items are OOS, they'll go to another store

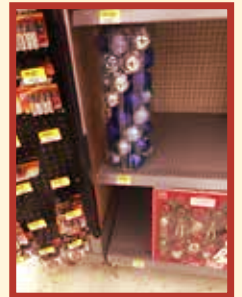
(N = 509; U.S.)

42%

said they go online to buy the OOS product



Field Agent  
OOS Photos



# IN-STORE Shopping FRUSTRATIONS

BAH, Humbug!



## MOST FRUSTRATING PART OF HOLIDAY SHOPPING



"Dealing with other people who have no concept of courtesy."

"It's frustrating to fight crowds therefore I do most of my shopping online."

"The masses of people. Black Friday is great but people are extremely rude..."

"I can't stand the overwhelming crowds."

"The crowds are the most frustrating part along with stores not having enough products in stock that you are trying to purchase."

"Having to compete with other shoppers when supplies are low and demands are high."

### IN THEIR OWN WORDS: WHAT IS THE MOST FRUSTRATING PART OF

# Holiday Shopping?

\*Actual Quotes from Agents



# Q4

## BRAND MANAGER'S GUIDE

Holiday Shopping Guide Continued On Page 21

# THE BRAND MANAGER'S GUIDE TO Q4 RETAIL EXECUTION



Originally  
Featured in:



[A free consumer insights report from MRMW's Mobile Research Agency of the Year]



## THE BRAND MANAGER'S GUIDE TO Q4 RETAIL EXECUTION

### The stakes are simply higher in Q4.

That goes for companies across a wide expanse of industries—from toys to fan gear, candy to consumer electronics.

As a company founded by CPG veterans for CPG professionals, Field Agent specializes in helping brands identify problems in their retail execution, ultimately to improve sales with shoppers.

With Q4 upon us, this guide will share some of the more common causes of suboptimal—you might say, underachieving—retail execution among CPG companies.

***Make the most of the all-important weeks ahead, by being mindful of the following in-store pitfalls.***

### Pitfall #1 Your products aren't on store shelves

You can't win if you don't first show up. And in the fiercely competitive contest for shoppers' dollars, some products are, well, no-shows.

Maybe your product never arrived in-store, or perhaps it's collecting dust in the backroom. Regardless, it's out-of-stock; it's unavailable to shoppers.

As reported by *RIS News*, retailers lose a staggering \$93 billion a year to out-of-stocks. What's more, shoppers despise stockouts.

In Q4 especially, brands should take necessary measures to ensure their products are actually on store shelves—where they belong.



*Consider that, in Field Agent's survey of 523 parents, 40% cited out-of-stocks as a "particularly frustrating" factor in shopping for toys, the third most common frustration in the entire survey.*







## THE BRAND MANAGER'S GUIDE TO Q4 RETAIL EXECUTION

### **Pitfall #2** **Your products aren't where you think they are inside stores**

Other times, your products are available, but they're misplaced in stores. That product that's supposed to be on the main aisle is actually languishing on Aisle 17, where, tragically, fewer shoppers will see it.

For brands, so much of retail success hinges on being in the *right place at the right time*.

At such times, when the sale depends entirely on the shopper's ability to see the merchandise, in-store placement is particularly critical. Brand managers should, therefore, regularly monitor the location of their products in stores, particularly before and during major retail events.

*According to Field Agent's research into the toy shopping behavior of parents, 63% admitted they at least sometimes make toy purchases on impulse, when the purchase wasn't necessarily planned or expected.*

### **Pitfall #3** **Shoppers can't see your products**

Maybe your products are in stock and in the "correct" place, yet shoppers don't notice them due to their placement on store shelves. They could be, for instance, situated too low or in a "blind spot." Or perhaps a rival (and, scary thought here, substitutable) brand enjoys superior shelf positioning and is easier for shoppers to see and reach.

The planogram (i.e., modular) is a rich source of competitive advantage and disadvantage. For CPG companies, it pays—quite literally—to be vigilantly aware of their products' on-shelf placement.



Agent Photos by **FIELD AGENT**®

**LEARN MORE ABOUT  
PLANOGRAM COMPLIANCE**  
[FREE CASE STUDY]



## THE BRAND MANAGER'S GUIDE TO Q4 RETAIL EXECUTION

### **Pitfall #4** **Your in-store marketing isn't being properly executed**

From product displays to coupon dispensers, in-store signage to interactive demos, brands will spend billions of dollars promoting their products throughout the Q4 selling season.

And for good reason. In-store marketing can make all the difference with purchase-minded shoppers.

***When Field Agent surveyed 523 parents about their toy-shopping behavior, fully 8-of-10 reported visually striking signage (i.e., featuring characters, movies, etc. associated with a toy) to be at least moderately influential over their purchase decisions.***

The problem is, all-too-often point-of-purchase marketing is not properly executed inside stores. Consider product displays for example, which could be failing to convert shoppers for any one of a number of reasons:

1. The point-of-sale materials and product never arrived at the store
2. The display never made it to the store floor (it's in the backroom)
3. The display is a casualty of inaccurate information, perhaps owing to human error and/or the retailer's inventory management system
4. The display is on the floor but in the wrong place
5. The display is on the floor but stocked with the wrong product

***Brand managers should take every stride to ensure their displays, signage, and other forms of in-store marketing are actually making money...not just spending it.***

**CLICK HERE TO READ  
OTHER CAUSES OF  
UNDERPERFORMING  
PRODUCT DISPLAYS**



Agent Photos by **FIELD AGENT**



## THE BRAND MANAGER'S GUIDE TO Q4 RETAIL EXECUTION

### Pitfall #5 Shoppers are seeing the wrong prices

Shoppers can be remarkably price sensitive, something brands well know. And a seemingly small pricing mistake can cost a brand sales both now (i.e., because the shopper thinks, "I didn't want to spend that much today") and in the future (i.e., because the shopper has the wrong idea about your product).

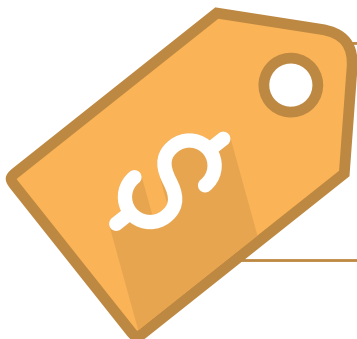
Your products could be incorrectly priced in stores due to:

1. Basic human error, like simple misprints or accidental oversights
2. Pressures and realities at the store level, which might cause local store managers to price products in unexpected ways
3. Inaccurate information, for instance, disagreement between the retailer's information system and pricing on the floor

[CLICK HERE TO READ OTHER CAUSES OF INCORRECT PRICES](#)



Agent Photos by **FIELD AGENT**<sup>®</sup>



In Field Agent's survey of over 500 parents, 81% said **price break signage**—i.e., clearly displaying a sale/discount on merchandise—was either extremely or very influential over their toy purchases.



## THE BRAND MANAGER'S GUIDE TO Q4 RETAIL EXECUTION

### Pitfall #6 Rival brands have a better in-store strategy and execution

The retail landscape is full of limitations: shelf space is limited; floor space is limited; shoppers' attention is limited. And, most importantly, shopper spending is limited. Such limitations naturally create a hyper-competitive environment.

If rival brands have a better in-store strategy and/or execution, it stands to reason your brand may be undercutting its potential. Successful brand managers, consequently, take steps to understand the competitive landscape inside stores. This is particularly true before and during Q4.

*If your products aren't selling, maybe it's because your competitors' products are?*

### Take Control of Your Q4 Retail Execution

Retail success may begin with a solid strategy, but it doesn't end there. Retail strategy, after all, is only as good as its execution.

As you prepare for make-or-break Q4 selling events, consider ways to optimize your retail execution. Ultimately, your success in the coming weeks will be determined not only by the sales you make *but also the sales you don't lose*—not only by the funds you spend (e.g., on in-store marketing) *but also the funds that aren't wasted*.

**Strategy + Execution = Q4 Success**

Field Agent crowdsources smartphones throughout the country to help brands avoid the pitfalls described over the last several pages. Fast, affordable Mobile Audits give brand managers control over their in-store operations, by bridging the “visibility gap” between headquarters and stores everywhere.

Download our infographic to learn more.

Learn More about Mobile Audits

DOWNLOAD  
INFOGRAPHIC



# GIFTS GALORE

From wee stocking-stuffers to brand new automobiles, every year holiday shoppers spend billions of dollars on gifts. Because the fate of so many companies rest on shoppers and their gift-buying decisions, this section is devoted to questions like:

*What gifts are men and women, boys and girls hoping for this year?  
How much do holiday shoppers expect to spend on their spouses and kids?  
What, ultimately, do holiday shoppers expect to buy?*

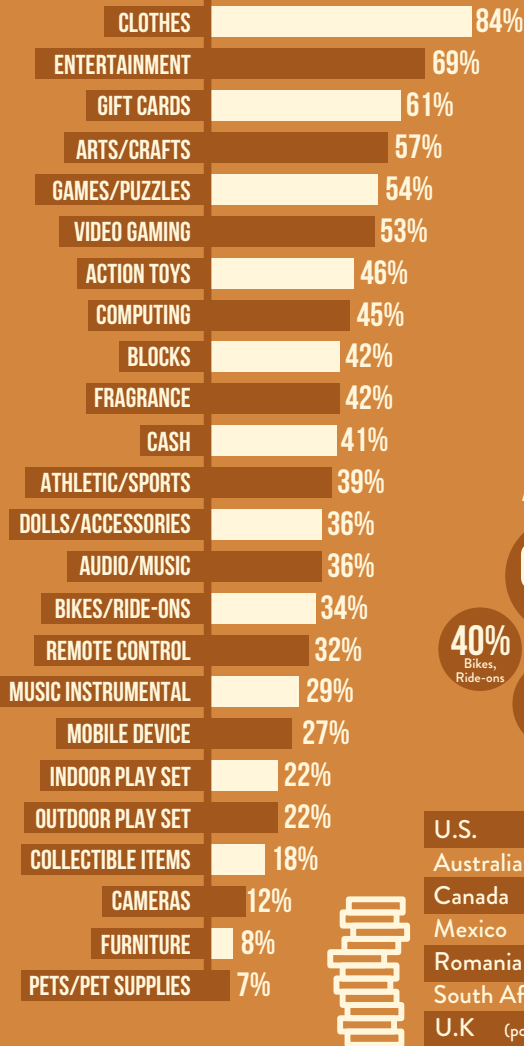
This section also examines shoppers' attitudes and behaviors toward electronic gifts, stocking-stuffers, and gift cards.

So turn the page to begin discovering timely gift-buying insights. Think of it as Field Agent's gift to you.



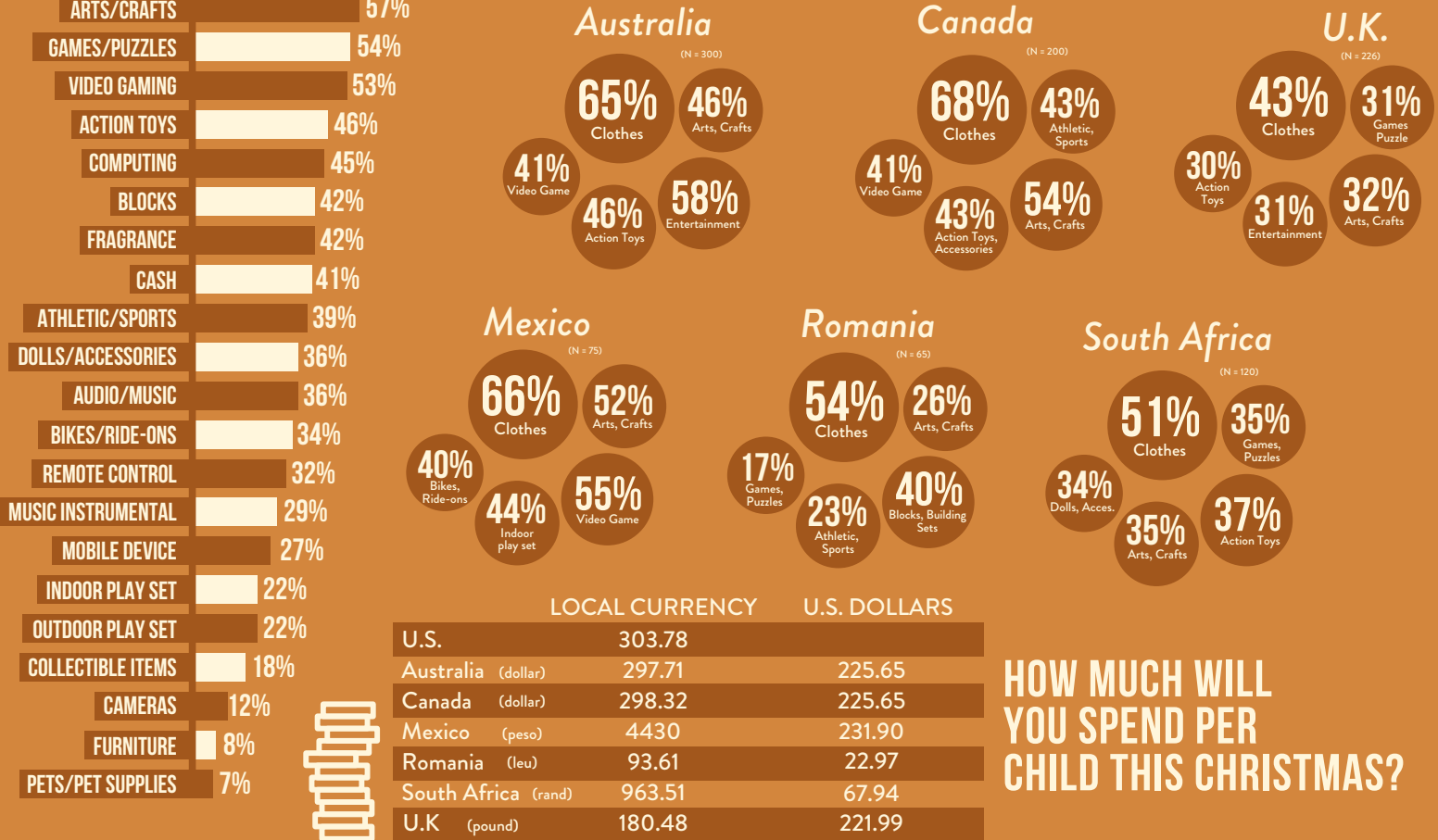
# HOLIDAY SHOPPING FOR KIDS

## U.S. GIFTS



## WHICH GIFTS ARE YOUR CHILDREN LIKELY TO RECEIVE?

Field Agent questioned Santa's best helpers—Moms—around the world to explore the gifts kids are asking for and likely to receive this holiday season.



## HOW MUCH WILL YOU SPEND PER CHILD THIS CHRISTMAS?

AN AVERAGE OF **\$303.78** WILL BE SPENT ON U.S. KID'S GIFTS

## HOW MUCH WILL YOUR CHILDREN RECEIVE?

46% said their children will receive MOST of the Christmas gifts they ask for

41% said their children will get only some of the gifts they ask for

## HOW INFLUENTIAL IS YOUR CHILD'S BEHAVIOR?

40% said their child's behavior is extremely or very influential to the number and types of gifts they receive.

30% said their behavior is not very or not at all influential

DOWNLOAD FIELD AGENT'S REPORT: "ALL THINGS TOYS" TO EXPLORE KIDS' 2016 GIFT WISHES

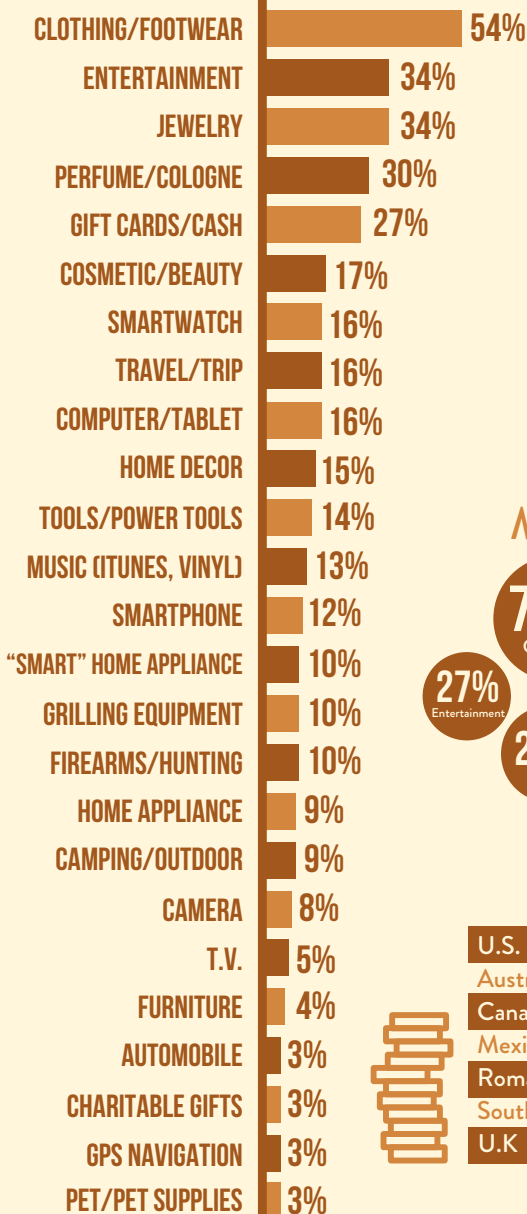
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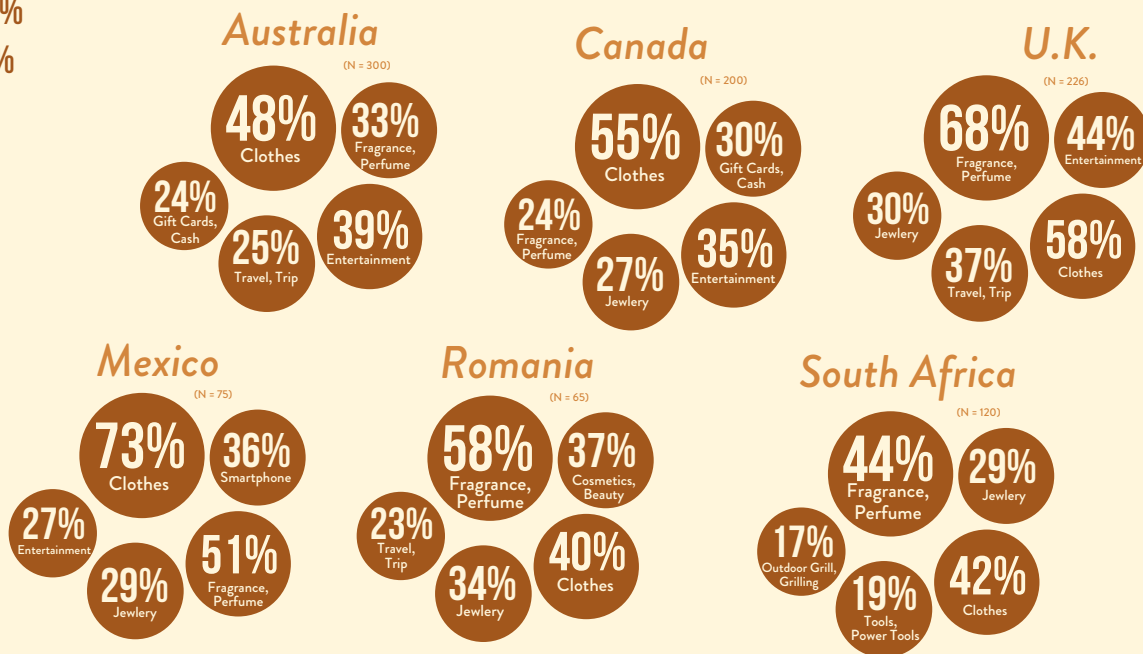
# HOLIDAY SHOPPING FOR THE "BETTER HALF"

## U.S. GIFTS

## WHAT GIFTS WILL YOU SERIOUSLY CONSIDER FOR YOUR SPOUSE?



Field Agent surveyed spouses around the world, split evenly between husbands and wives, to identify the gifts holiday shoppers say they'll seriously consider for their spouses this year.



	LOCAL CURRENCY	U.S. DOLLARS
U.S.	286.35	
Australia (dollar)	254.37	192.39
Canada (dollar)	331.12	250.46
Mexico (peso)	3637	194.80
Romania (leu)	191.56	47
South Africa (rand)	1615.28	113.89
U.K. (pound)	178.38	219.41

## HOW MUCH WILL YOU SPEND ON YOUR SPOUSE THIS CHRISTMAS?



AN AVERAGE OF \$286.35 WILL BE SPENT ON U.S. SPOUSES

(N = 505; U.S.)

## WHEN DO YOU OPEN GIFTS?



42%

wait until Christmas Day to open gifts.



41%

open just one gift prior to Christmas Day.

(N = 505; U.S.)



# MEN & WOMEN'S GIFT WISHES

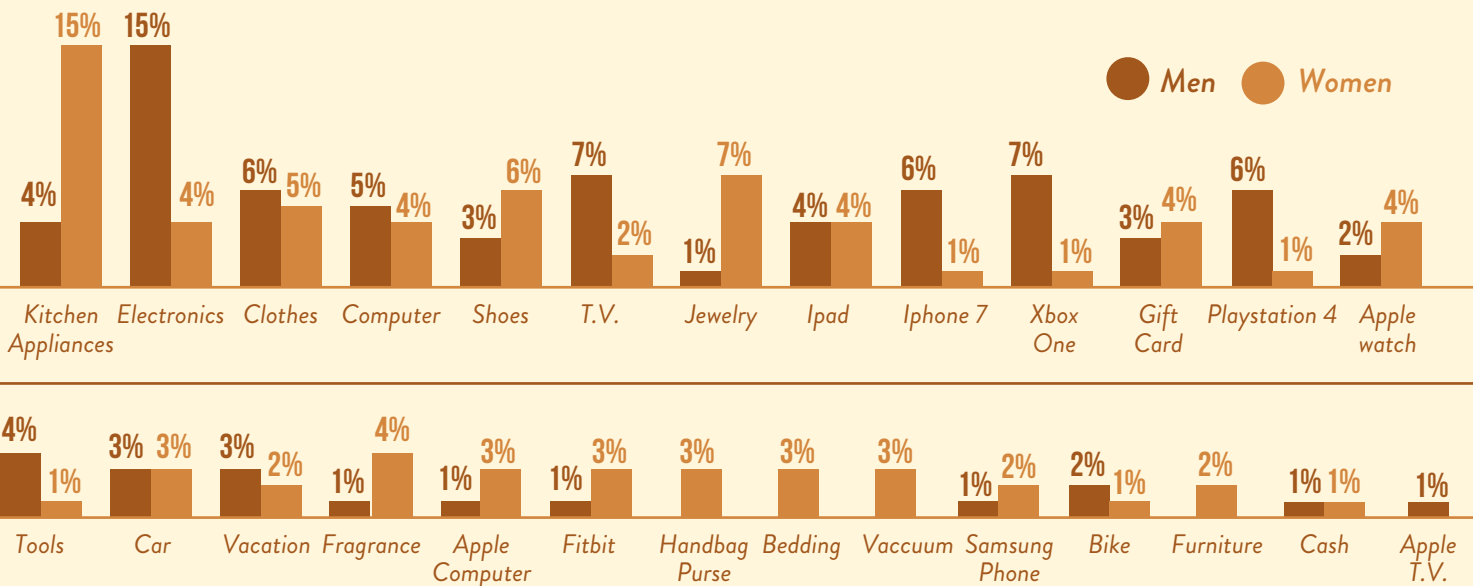
**38%** prefer receiving **CASH** over merchandise, experiences, food/beverages, and gift cards

24% prefer merchandise, 20% prefer gift cards, 17% prefer experiences  
(N = 512, U.S.)



## WHAT DO MEN & WOMEN REALLY WANT FOR CHRISTMAS?

Field Agent put this question to 512 U.S. adults as an open-ended, free form question. The mobile research firm then analyzed the qualitative responses for themes. The following are the most prevalent gift wishes among men and women entering the 2016 holiday season.



Actual Agent Gift



Need in-home insights from customers during the holiday season? Field Agent goes anywhere, anytime—including living rooms, kitchens, and dining rooms—to capture the insights that matter most.

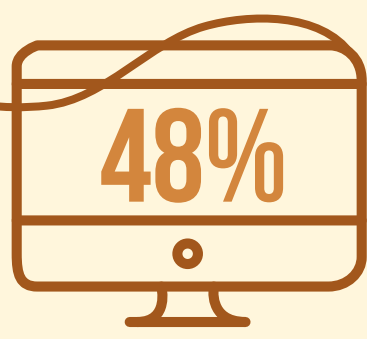
**CONTACT US**



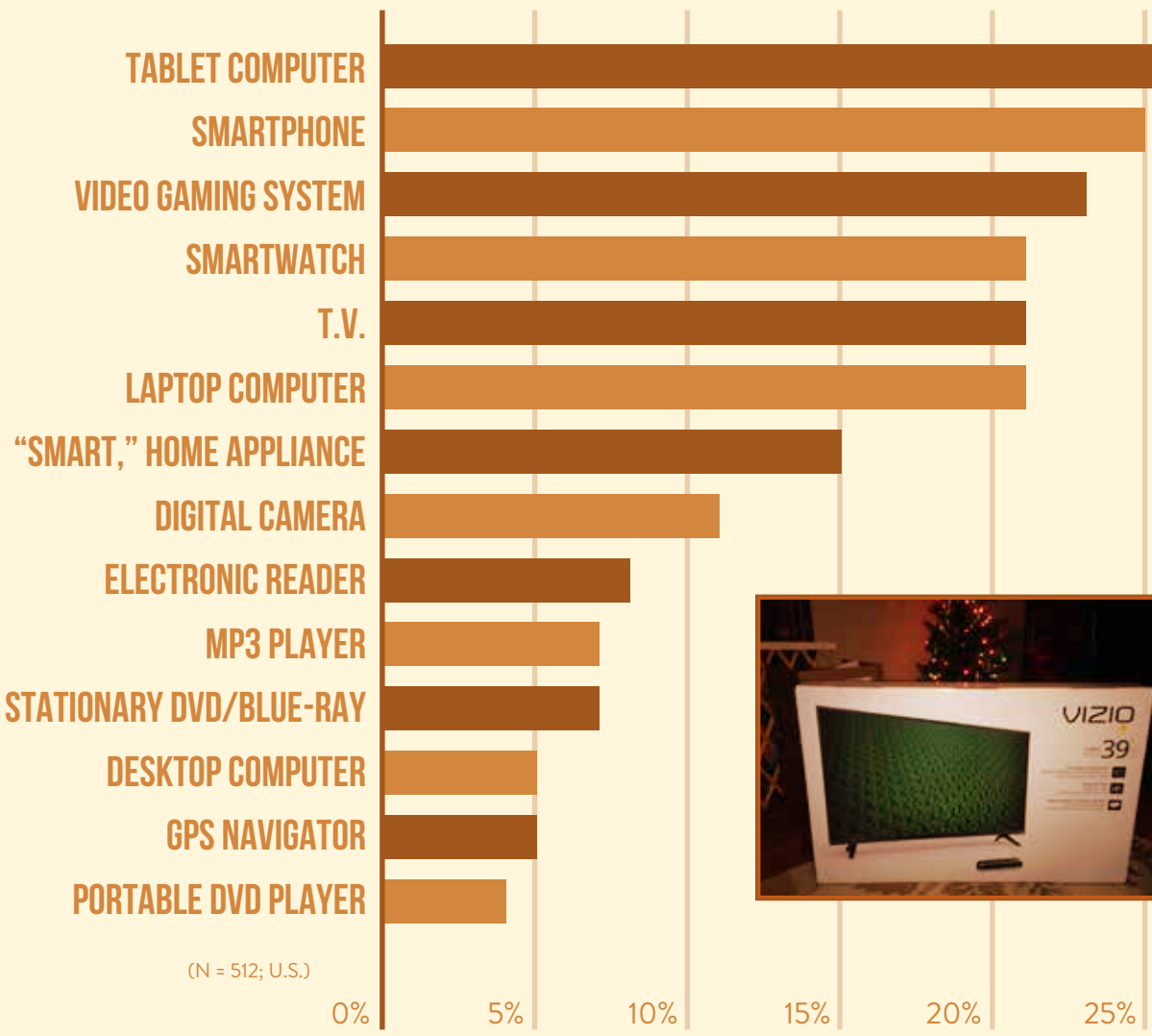
# OH CHRISTMAS TECH, OH CHRISTMAS TECH...

This year, **48%** of families say they anticipate spending more on **consumer electronics** compared to last year, while **23%** say they'll probably spend less.

(N = 505; U.S.)



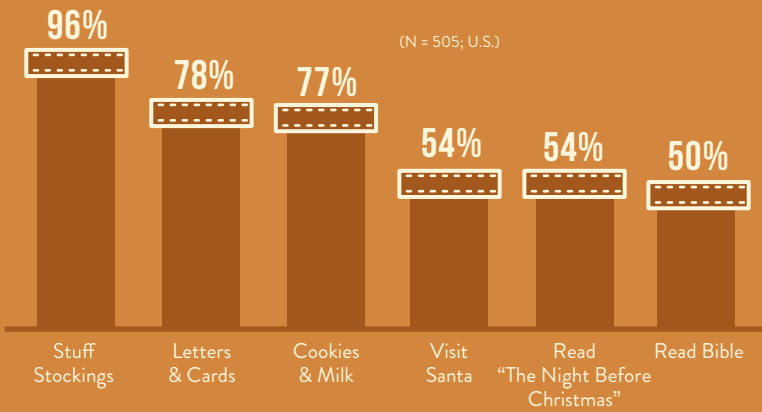
## WHICH TECH GIFTS ARE POISED FOR A STRONG CHRISTMAS 2016?



Field Agent In-Home Photos

# Fillin' the Stockings

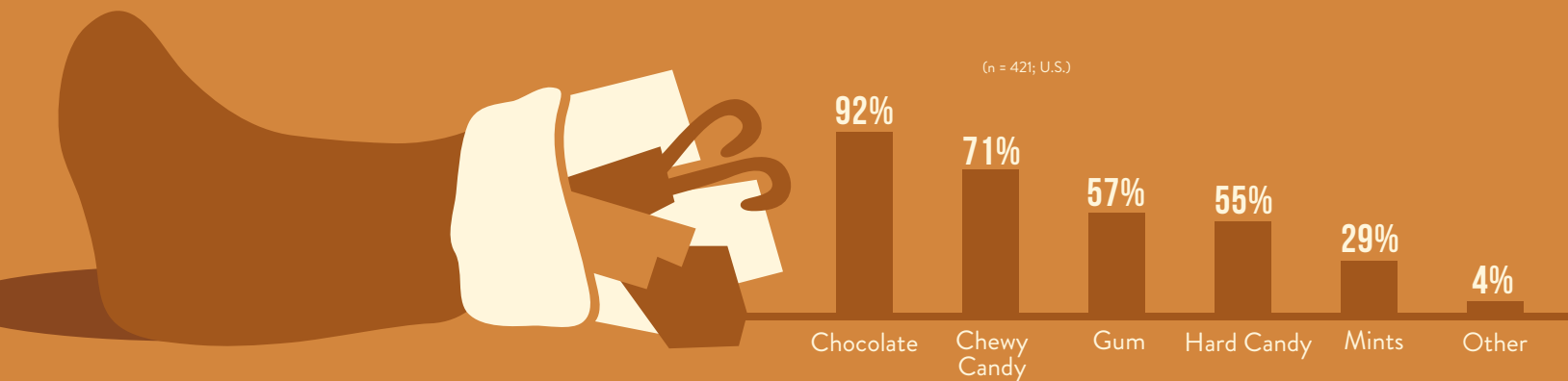
Which Christmas activities will your family participate in this holiday season?



## WHAT WILL YOU PUT IN YOUR KID'S STOCKINGS?

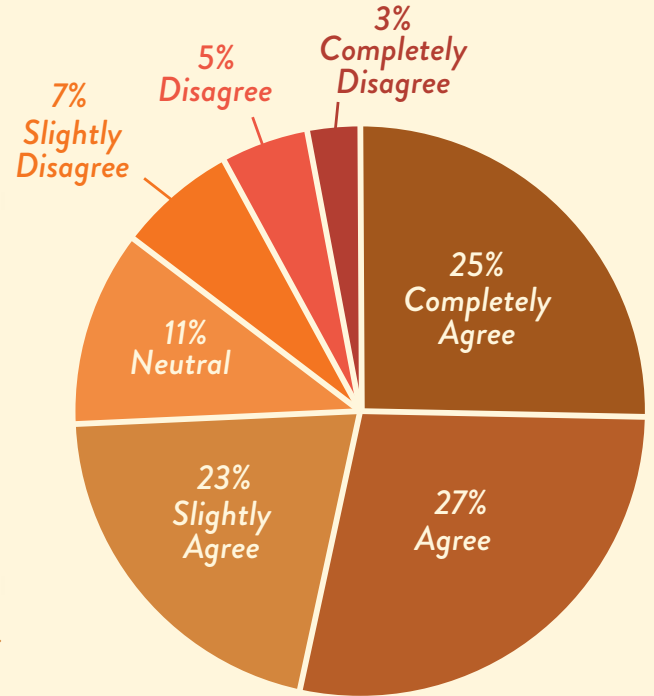


## WHAT CANDY WILL YOU PUT IN YOUR KID'S STOCKINGS?



# THE SKINNY ON GIFT CARDS

“I BELIEVE GIFT CARDS MAKE GOOD CHRISTMAS GIFTS”?



(N = 510; U.S.)

WHY DO SOME PEOPLE NOT LIKE GIFT CARDS AS CHRISTMAS GIFTS?

**67%** said they're "cold and impersonal"

(N = 72; U.S.)

**61%** said they "lack creativity and thought."

# FOOD BEVERAGES OF THE HOLIDAYS

The holidays excite the taste buds. It's a season of honey ham, sweet potato casserole, candy canes, sugar cookies, gingerbread, egg nog, and—*meh*—fruitcake.

The holidays also excite grocers and food-and-beverage brands as they anticipate, year after year, the millions of shoppers who converge on stores to fill up their baskets with a wide range of holiday fare.

The final section of this report delves into the subject of holiday foods and beverages: What do families serve on Christmas? When do they partake? What roles do alcohol and takeout play in holiday feasting?

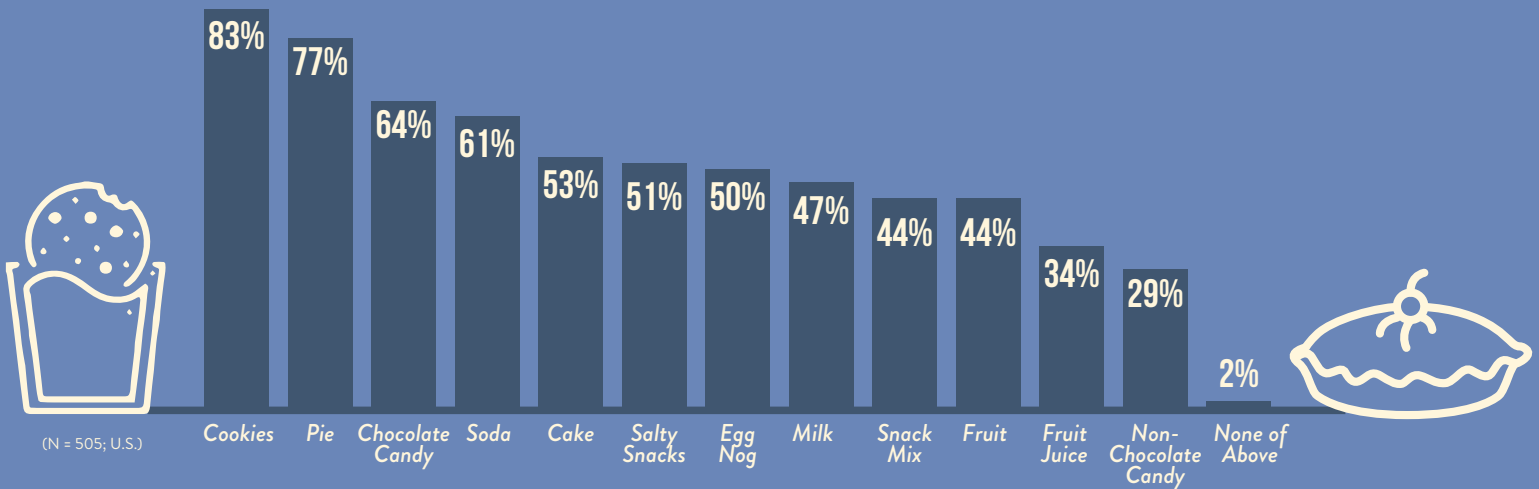
Last but not least, the section concludes with a collection of miscellaneous insights into holiday shoppers, including battery purchases, gifts for pets, and even movie-watching behavior.

# EATING IN AT CHRISTMASTIME

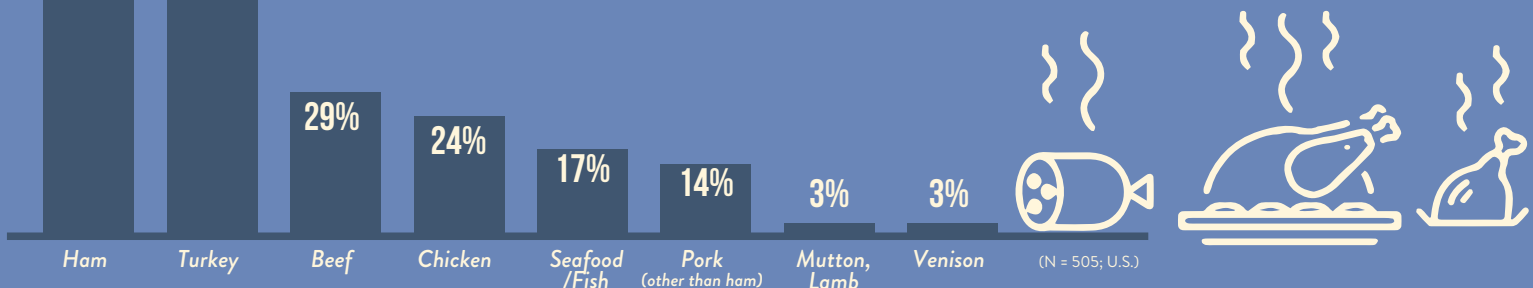
## THE MOST POPULAR HOLIDAY MEAL?



## WHICH OF THE FOLLOWING FOODS, SNACKS, AND/OR BEVERAGES DOES YOUR HOUSEHOLD SERVE ON CHRISTMAS EVE AND/OR DAY?



## WHICH MEATS DOES YOUR HOUSEHOLD SERVE ON CHRISTMAS EVE AND/OR DAY?



# EATING TAKEOUT AT CHRISTMASTIME

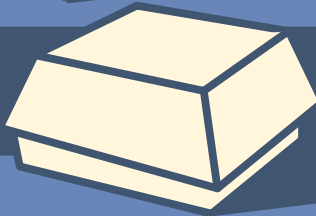
## DO FAMILIES PURCHASE TAKEOUT FOR THE HOLIDAYS?

35%



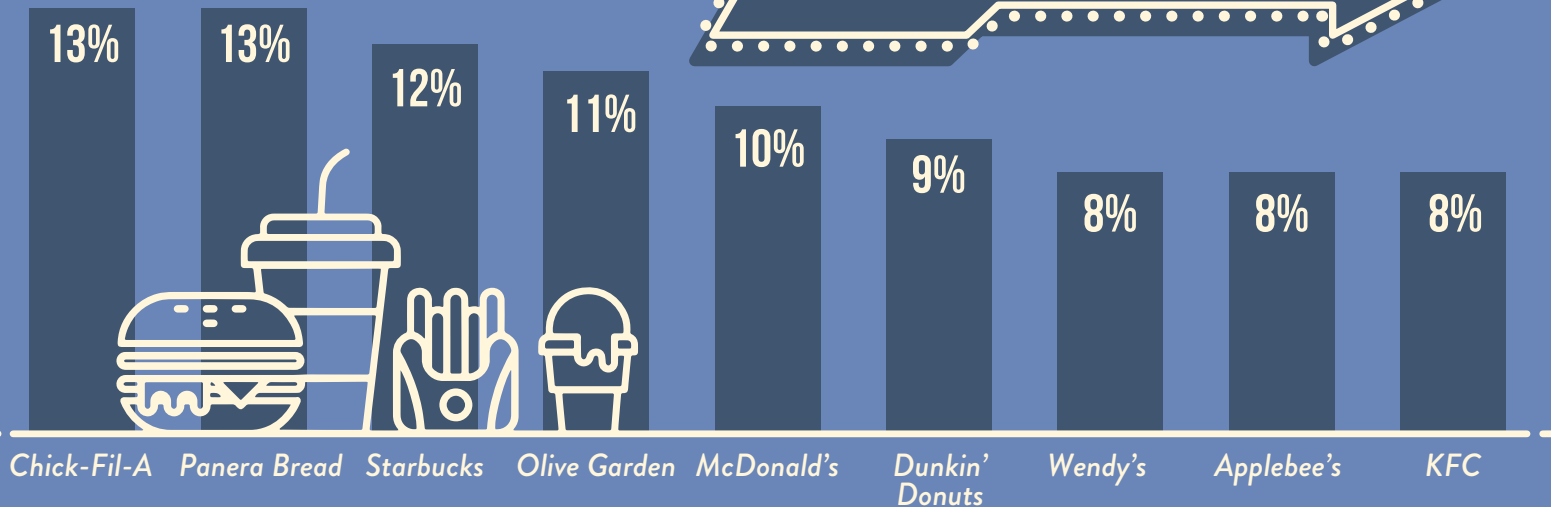
Purchase takeout from FAST CASUAL/CASUAL DINING RESTAURANTS to enhance their holiday celebrations (N = 505; U.S.)

33%



Purchase FAST FOOD to celebrate the holidays

## WHICH NATIONAL RESTAURANT CHAINS ARE YOU MOST LIKELY TO PURCHASE TAKEOUT FROM DURING THE HOLIDAYS?



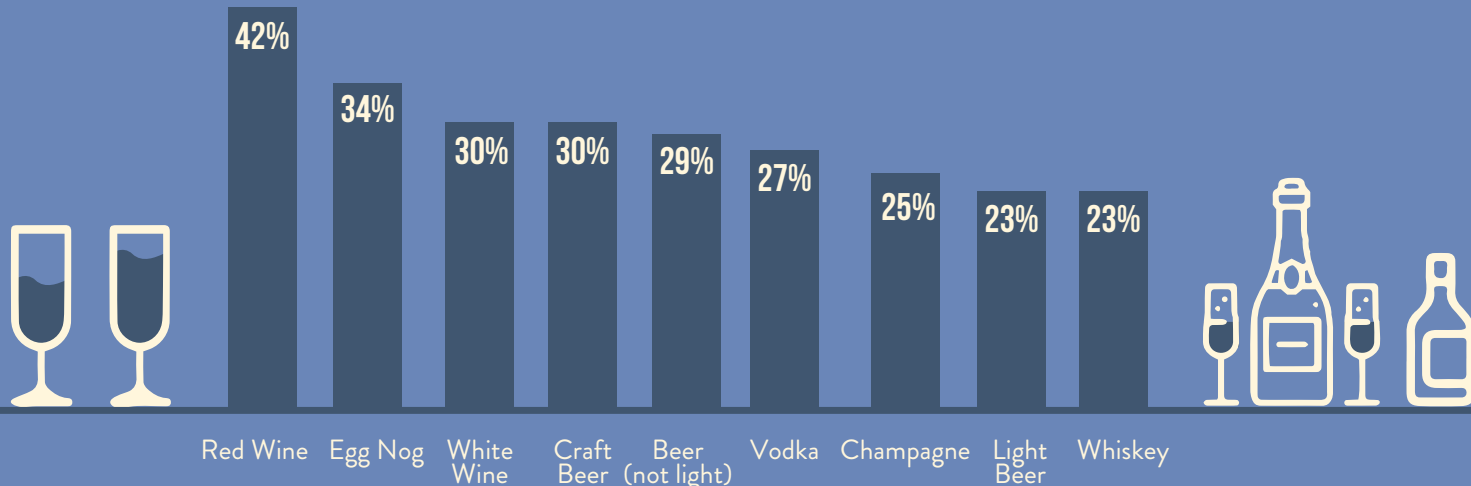
Taco Bell 7%; Chipotle 7%; Cracker Barrel 7%; Pizza Hut 7%; Buffalo Wild Wings 7%; Little Caesar's 7%; Chili's 5%; (n = 250; U.S.)  
 Reb Lobster 5%; Burger King 5%; Domino's 5%; Papa John's 5%; IHOP 4%; Outback 4%; Arby's 4%; Dairy Queen 4%; Sonic 4%;  
 Denny's 3%; TGI Friday's 2%; Jack In The Box 2%


# THE HOLIDAY PARTY SCENE

## HOW LIKELY ARE YOU TO CONSUME ALCOHOL ON CHRISTMAS EVE/DAY?

	U.S. (N = 512)	AUSTRALIA (N = 300)	CANADA (N = 200)	MEXICO (N = 75)	ROMANIA (N = 65)	SOUTH AFRICA (N = 120)	U.K. (N = 226)	COMBINED
Completely Likely	40%	48%	39%	62%	31%	26%	52%	43%
Very Likely	21%	21%	24%	19%	25%	27%	19%	22%
Moderately Likely	16%	18%	19%	7%	31%	17%	13%	17%
Not Very Likely	10%	4%	9%	7%	8%	14%	7%	8%
Not At All Likely	13%	9%	11%	5%	6%	16%	10%	10%

## WHICH ALCOHOLIC BEVERAGES DO YOU EXPECT TO CONSUME ON CHRISTMAS EVE AND/OR DAY?

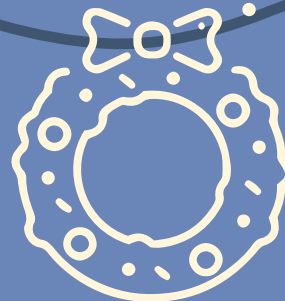


**51%**  said they're extremely or very likely to host a Christmas party  
(N = 512; U.S.)

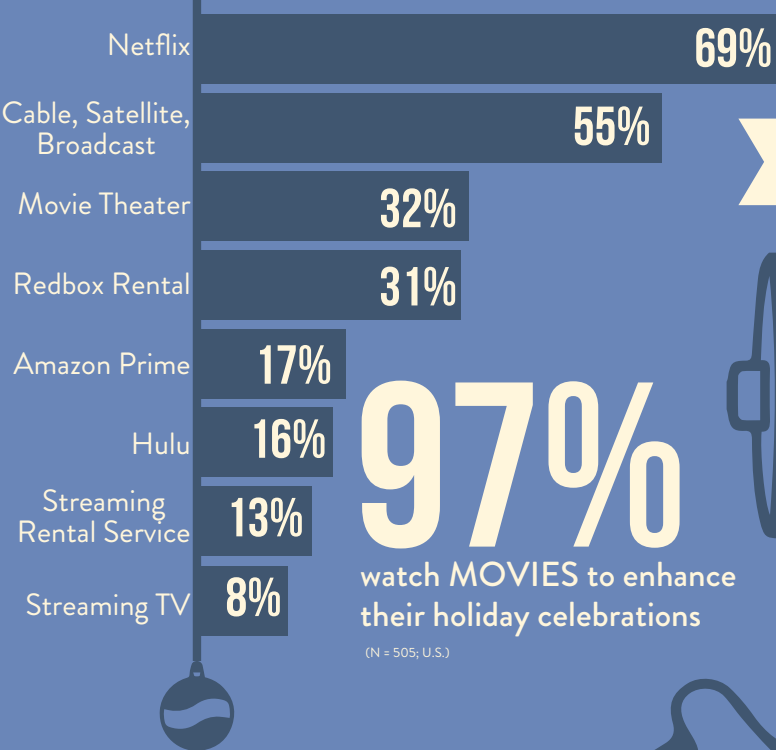
**\$355.03** is the average amount adults will spend hosting Christmas parties.  
(among those extremely or very likely to host a Christmas party)  
(N = 259; U.S.)

# AROUND THE HOUSE

**49%** of families start **DECORATING** for Christmas in late November *after* Thanksgiving  
(N = 505; U.S.)



## HOW DO FAMILIES WATCH HOLIDAY MOVIES?



**97%** watch **MOVIES** to enhance their holiday celebrations  
(N = 505; U.S.)

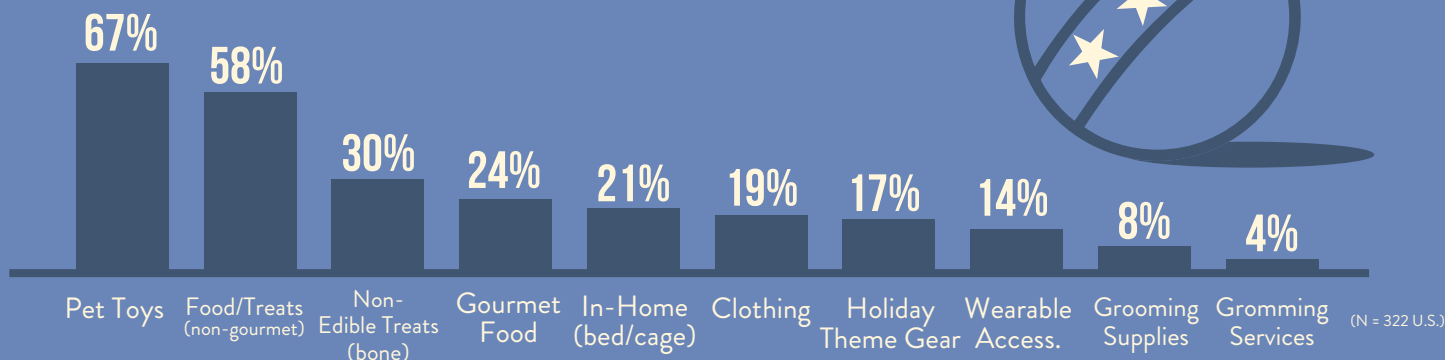
## HOW DO FAMILIES POWER UP CHRISTMAS?



**54%** of pet owners around the world said they are completely or very likely to purchase pet gifts this Christmas

High of 70% in the U.S. and Low of 28% in Romania

## WHAT WILL PET OWNERS GIVE THEIR PETS?





# DEMOS & METHODS - UNITED STATES

## 3 SURVEYS: 1,527 HOLIDAY SHOPPERS

### HOLIDAY SHOPPER SURVEY 1



**Sample:** 512

**Gender** \_\_\_\_\_

50% male                      50% female

**Age** \_\_\_\_\_

18-24: 5%                      55-64: 6%  
 25-34: 35%                      65+: 1%  
 35-44: 37%  
 45-54: 17%

**Qualifiers:** \_\_\_\_\_

Field Agent conducted a screener to ensure all respondents observe Christmas by purchasing holiday gifts for members of their respective households.

### HOLIDAY SHOPPER SURVEY 2



**Sample:** 510

**Gender** \_\_\_\_\_

50% female                      50% male

**Age** \_\_\_\_\_

18-24: 6%                      45-54: 20%  
 25-34: 31%                      55-64: 7%  
 35-44: 36%                      65+: 2%

**Qualifiers:** \_\_\_\_\_

Field Agent conducted a screener to ensure all respondents observe Christmas by purchasing holiday gifts for members of their respective households.

### CHRISTMAS WITH KIDS SURVEY



**Sample:** 505 mothers of 5-17 yr. olds

**Gender** \_\_\_\_\_

100% female

**Age** \_\_\_\_\_

18-24: 1%                      45-54: 19%  
 25-34: 28%                      55-64: 2%  
 35-44: 50%                      65+: 0%

**Qualifiers:** \_\_\_\_\_

Field Agent conducted a screener to locate mothers of 5-17 year olds whose households observe Christmas partly by purchasing holiday gifts for one another.

# DEMOS & METHODS - INTERNATIONAL

## 1,347 HOLIDAY SHOPPERS ACROSS 6 COUNTRIES

The international portion of the Field Agent holiday shopper study consisted of surveys with 1,347 consumers across 6 different countries: Australia, Canada, Mexico, Romania, South Africa, and the United Kingdom. The same survey was conducted in each country, with minor modifications for local differences.

To participate in an international survey, respondents were required to satisfy four conditions:

1. They must observe Christmas
2. They must be married
3. They must purchase holiday gifts in observance of Christmas
4. They must be parents of children 5-17 years of age

### AUSTRALIA <https://fieldagent.net.au/>



**Sample: 300**  
**Gender** \_\_\_\_\_  
 79% female      21% male  
**Age** \_\_\_\_\_  
 18-24: 12%      55-64: 2%  
 25-34: 26%      65+: 0%  
 35-44: 40%  
 45-54: 20%

### ROMANIA <https://fieldagent.ro/>



**Sample: 65**  
**Age** \_\_\_\_\_  
 18-24: 15%      45-54: 6%  
 25-34: 33%      55-64: 0%  
 35-44: 42%      65+: 3%

### CANADA <https://ca.fieldagent.net/>



**Sample: 200**  
**Gender** \_\_\_\_\_  
 61% female      39% male  
**Age** \_\_\_\_\_  
 18-24: 2%      45-54: 20%  
 25-34: 25%      55-64: 3%  
 35-44: 50%      65+: 1%

### UNITED KINGDOM <https://www.fieldagent.co.uk/>



**Sample: 587**  
**Gender** \_\_\_\_\_  
 56% female      44% male  
**Age** \_\_\_\_\_  
 18-24: 13%      45-54: 12%  
 25-34: 39%      55-64: 3%  
 35-44: 31%      65+: 0%

### MEXICO <https://fieldagent.mx/>



**Sample: 75**  
**Gender** \_\_\_\_\_  
 36% female      64% male  
**Age** \_\_\_\_\_  
 18-24: 29%      45-54: 2%  
 25-34: 59%      55-64: 2%  
 35-44: 8%      65+: 0%

### SOUTH AFRICA



**Sample: 120**  
**Gender** \_\_\_\_\_  
 66% female      34% male  
**Age** \_\_\_\_\_  
 18-24: 4%      45-54: 8%  
 25-34: 47%      55-64: 1%  
 35-44: 39%      65+: 1%



 **WHAT'S IN-STORE**   
**THIS HOLIDAY SEASON?**

For companies, the holidays are truly a make-or-break moment. It's not the time to take chances on in-store execution or to make best guesses about shopper behavior. It's a time for firsthand, eyes-on certainty.

Mobile Audits and Research from Field Agent crowdsource hundreds of thousands of smartphones around the world to capture in-store information about displays, out of stocks, prices, shelf placement, and competitors, and to capture in-the-moment insights directly from holiday shoppers.

*Field Agent has the holidays covered, with fast, affordable, far-reaching Mobile Audits and Research*

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