
IAB 2015

Holiday Shopper Playbook

Guide to Holiday Shoppers and Digital Influence
on Clothing and Electronics Purchases

Questions?

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Summary & Implications

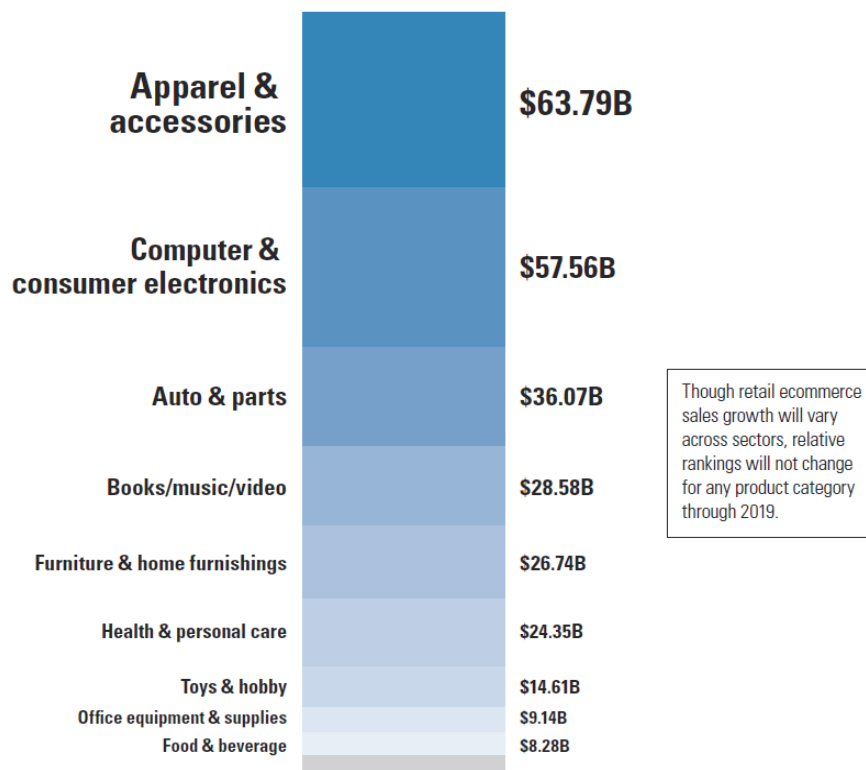
- **Estimates range in terms of how much consumers plan to spend during this holiday season but one thing is certain: Consumers of all age groups will spend money on holiday gifts and related items this season.**
- **As the top product categories sold digitally, shopping behaviors and influences around Clothing and Consumer Electronics are explored in detail in this report. Toys and other holiday shopping categories are also briefly outlined.**
- **The IAB Holiday Shopper Playbook also delves into how digital media and mobile devices are used differently among various age groups.**

Clothing and Electronics are the Top Categories for Digital Shoppers

What Digital Shoppers Are Buying

Apparel and accessories is the No. 1 product category sold digitally, and will retain the top spot through at least 2019. Growth is highest this year for health and personal care products, followed closely by toys and hobby, and food and beverage.

Apparel and Electronics are the top product categories sold digitally and will account for \$64B and \$58B in sales by 2019.

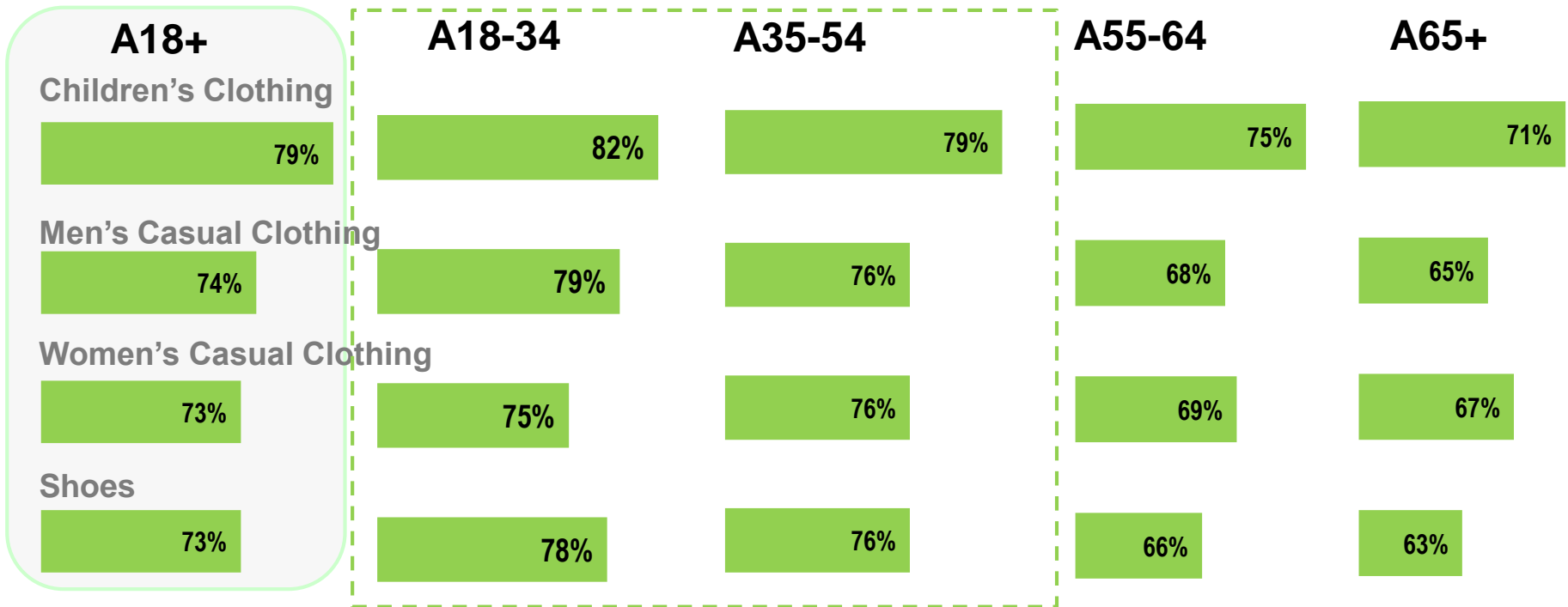


Source: eMarketer 'What Digital Shoppers are Buying' 2015

Roughly 3 in 4 Plan to Spend at Least as Much on Clothing This Season as They Spent Last Year

- 18-34 Year Olds and 35-54 Year Olds More Likely to Spend on Clothing Over the Holiday Season
- Across All Age Groups, More Consumers are Planning to Spend on Children’s Clothing than on Other Apparel

Percent who **Plan to Spend Same or More on Clothing (than last year) in next 90 days (Oct., Nov. Dec.):**



Across Age Groups, Consumers Shop for Clothing in Stores, Online and via Mobile

- Most will Spend at Least as Much Online as They Spent Last Year During the Holidays
- 18-34 Year Olds are Nearly Twice as Likely to Clothing Shop via Mobile

A18+

A18-34

A35-54

A55-64

A65+

Percent who **Plan to Spend the Same or More Online** Than Last Year in the next 90 days:



How They Shopped (in the Past 30 Days):

Apparel and Accessories:

Physical Store



Online



Mobile



Shoes:

Physical Store



Online



Mobile



Digital Media Influences Clothing Purchases

1 in 4 are Influenced by Email Ads, 1 in 5 by Internet Ads

- Younger Clothing Shoppers are Even More Influenced by Digital and Mobile Media

A18+

A18-34

A35-54

A55-64

A65+

Percent who are Influenced by Digital and Mobile Media in their Clothing Purchases:

Email Ads:

26%

32%

27%

24%

16%

Internet Ads:

19%

24%

19%

16%

10%

Social Media:

13%

21%

14%

8%

5%

Mobile Video:

9%

18%

8%

3%

1%

Mobile Devices:

9%

15%

9%

6%

3%

Blogs:

7%

14%

6%

3%

2%

Text Messages:

7%

13%

7%

4%

2%

Web Radio:

5%

10%

4%

2%

1%

Online Gaming Ads:

5%

9%

4%

1%

1%

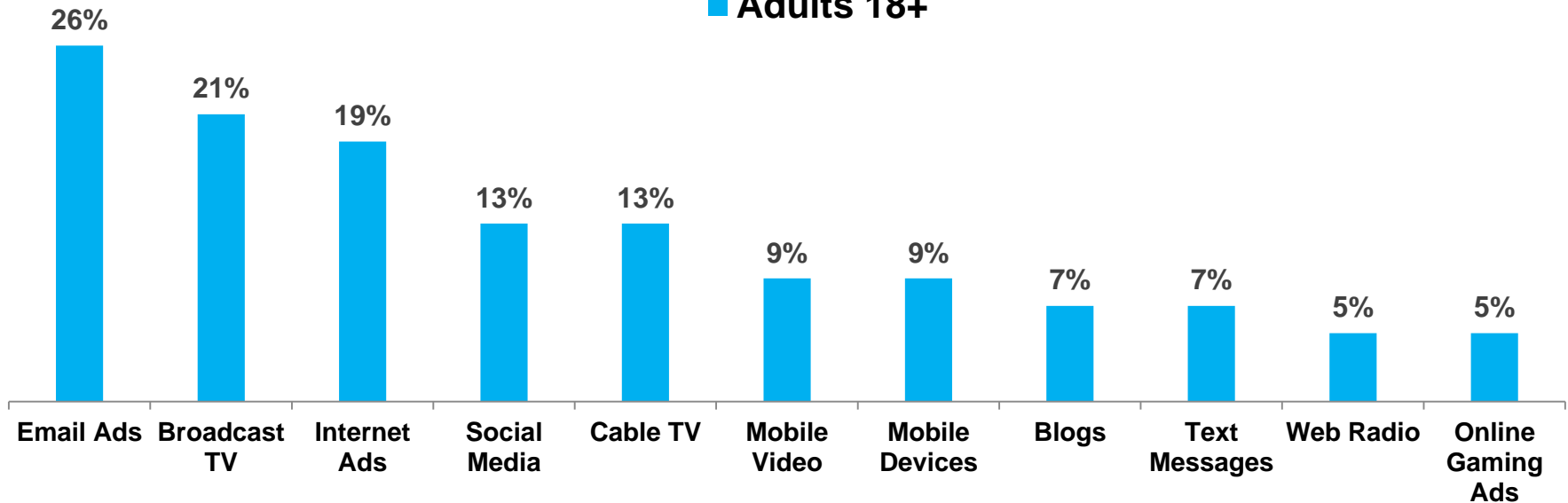
Please tell us which of the following media influences your CLOTHING purchases?
2% difference is statistically significant

1 in 4 US Adults Report that their Clothing Purchases are Influenced by Email Ads

- 1 in 5 are Influenced by Internet Ads
- Social Media is as persuasive as Cable TV in influencing Clothing Purchases
- More are influenced by Email (26%) than Broadcast TV (21%)
- More are influenced by Email Ads (26%) or Internet Ads (19%) than Cable TV (13%)

Percent who are Influenced by Digital and Mobile Media in their Clothing Purchases

■ Adults 18+

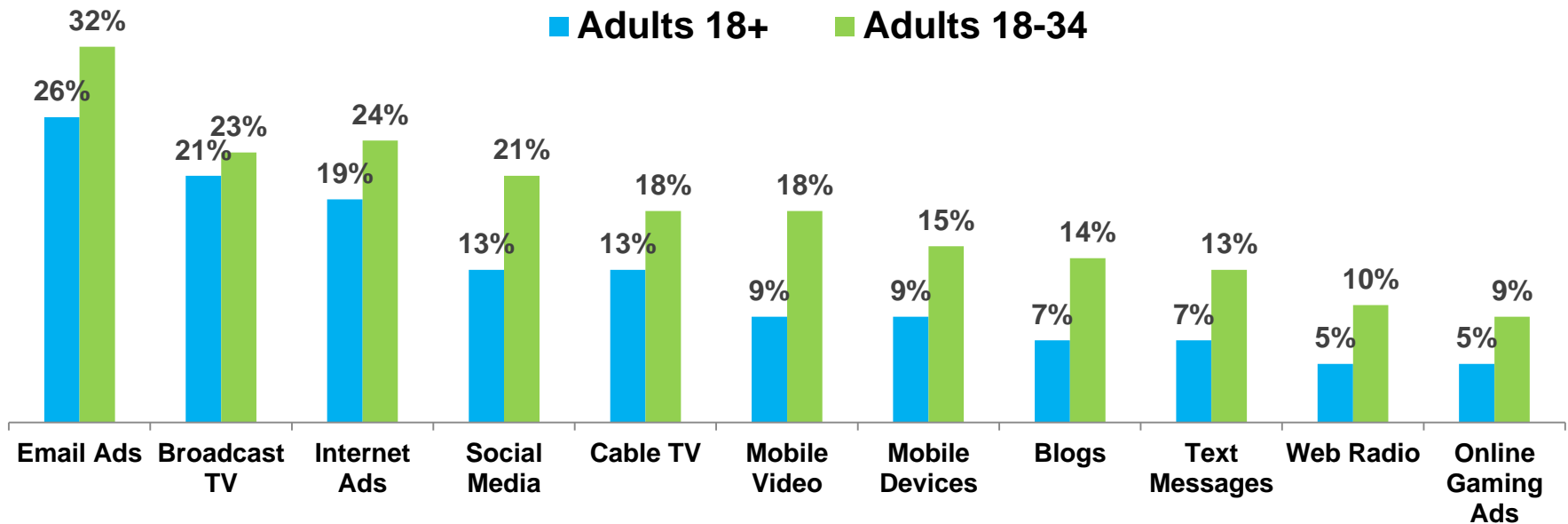


Please tell us which of the following media influences your CLOTHING purchases?
2% difference is statistically significant

18-34 Year Olds are Much More Likely to Be Influenced by Digital Media in Their Clothing Purchases

- 1 in 3 are Influenced by Email Ads, 1 in 4 by Internet Ads, 1 in 5 by Social Media
- More Influenced by Email Ads than Broadcast TV in their Clothing Purchases
- More Influenced by Internet Ads or Social Media than Cable TV
- Twice as likely as all US Adults to be Influenced by Mobile Video, Blogs or Web Radio

Percent who are Influenced by Digital and Mobile Media in their Clothing Purchases

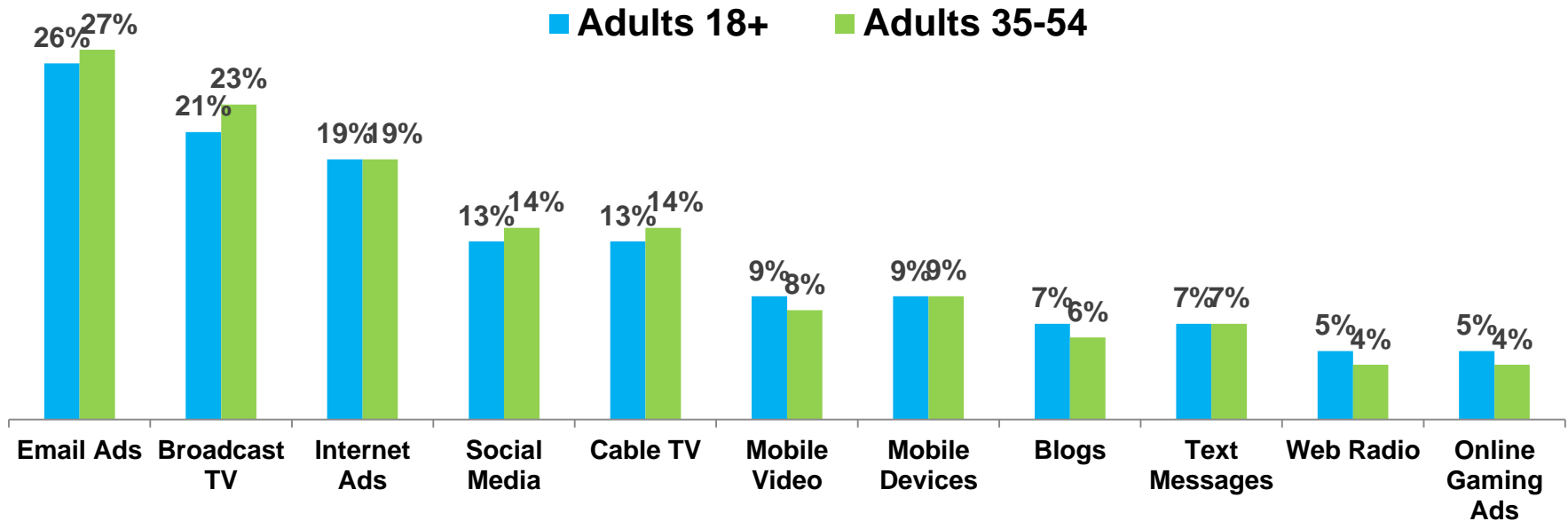


Please tell us which of the following media influences your CLOTHING purchases?
 2% difference is statistically significant

Email Ads and Internet Ads are Strong Influences on the Clothing Purchases of 35-54 Year Olds

- Roughly 1 in 4 are Influenced by Email Ads in their Clothing Purchases
- 1 in 5 are Influenced by Internet Ads
- More Influenced by Email Ads than Broadcast TV
- More Influenced by Internet Ads than Cable TV

Percent who are Influenced by Digital and Mobile Media in their Clothing Purchases

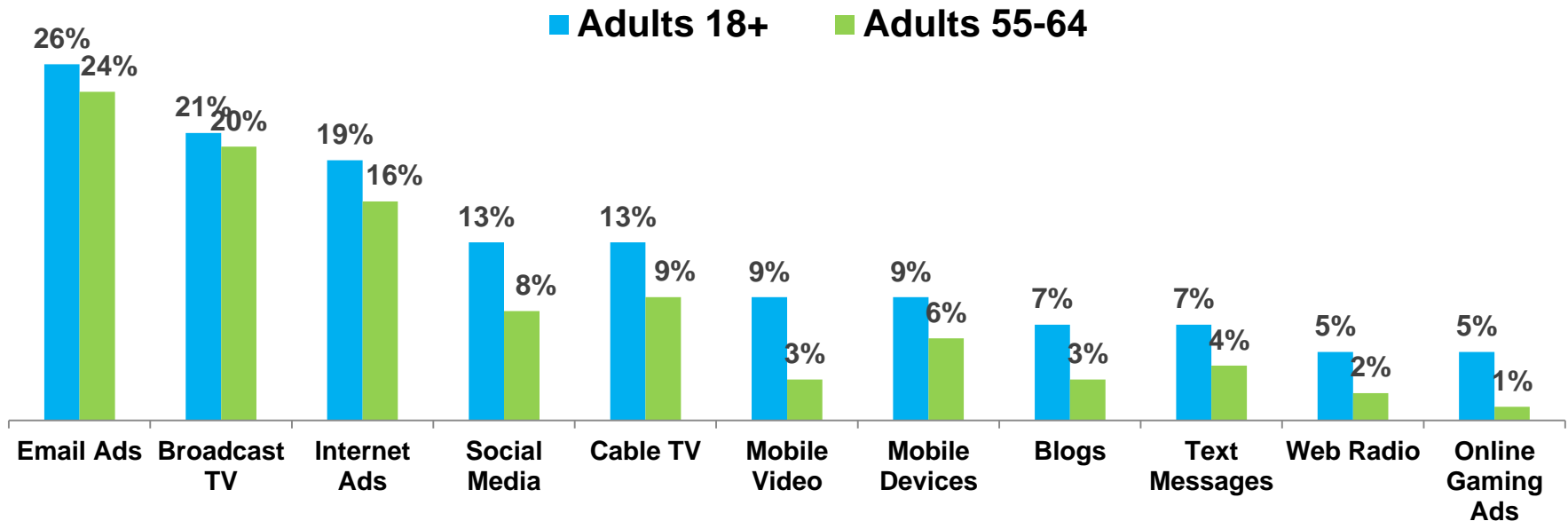


Please tell us which of the following media influences your CLOTHING purchases?
2% difference is statistically significant

More 55-64 Year Olds are Influenced by Email Ads Than by TV in Their Clothing Purchases

- Nearly 1 in 4 are Influenced by Email Ads in their Clothing Purchases
- More 55-64 Year Olds are Influenced by Email Ads than by Broadcast TV
- More Influenced by Internet Ads than Cable TV

Percent who are Influenced by Digital and Mobile Media in their Clothing Purchases

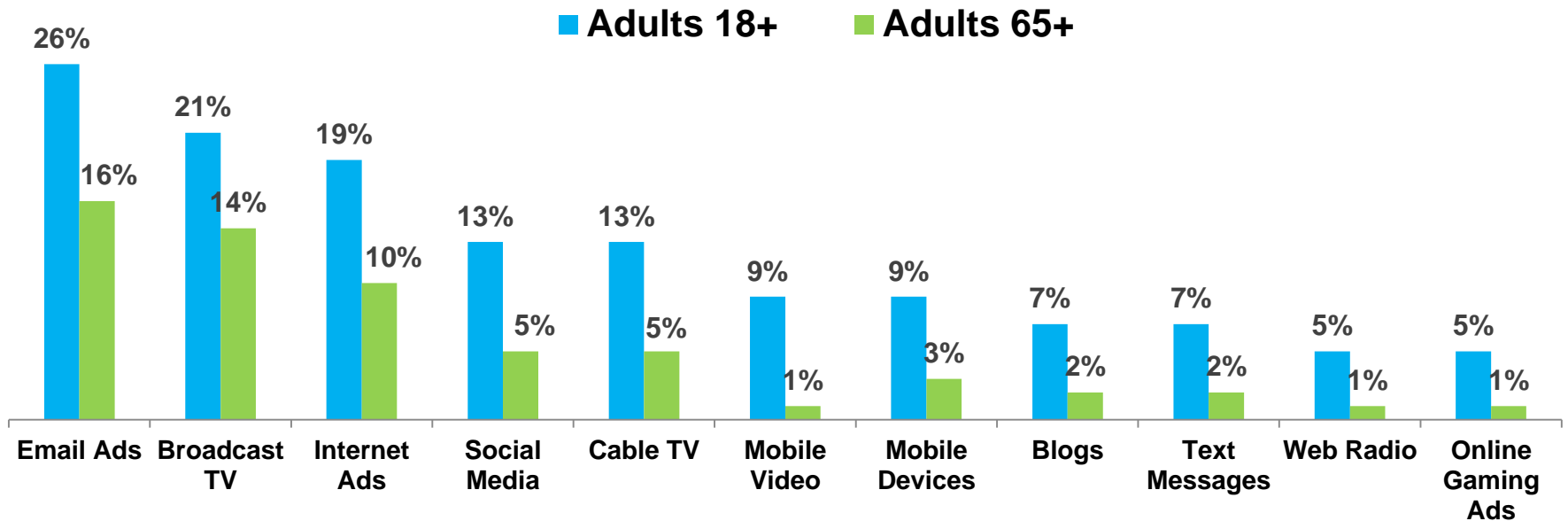


Please tell us which of the following media influences your CLOTHING purchases?
2% difference is statistically significant

Twice as Many US Adults 65 and Older are Influenced by Internet Ads Than by Cable TV in Their Clothing Purchases

- More Influenced by Email Ads than Broadcast TV in Their Clothing Purchases
- Twice as Influenced by Internet Ads as Cable TV

Percent who are Influenced by Digital and Mobile Media in their Clothing Purchases



Please tell us which of the following media influences your CLOTHING purchases?
2% difference is statistically significant

Digital and Mobile Influence on Clothing Purchases

Email Ads More Likely to Influence Clothing Purchases than TV

Digital and Mobile Media Influence on Clothing Purchases:

A18+

- 1 in 4 influenced by Email Ads, 1 in 5 by Internet Ads in Clothing purchases
- More Influenced by Email than Broadcast TV
- More Influenced by Email Ads or Internet Ads than Cable TV
- Social Media is as influential as Cable TV

A18-34

- Most influenced by Digital: 1 in 3 by Email Ads, 1 in 4 by Internet Ads, 1 in 5 by Social Media
- More Influenced by Email than Broadcast TV
- More Influenced by Internet or Social than Cable TV
- Almost Twice as likely as A18+ to be Influenced by Mobile Video, Blogs, Video Game Ads

A35-54

- Nearly 1 in 4 Influenced by Email Ads and 1 in 5 by Internet Ads
- More influenced by Email than Broadcast TV
- More Influenced by Internet Ads than Cable TV

A55-64

- Nearly 1 in 4 Influenced by Email Ads
- More Influenced by Email than Broadcast TV
- More Influenced by Internet Ads than Cable TV

A65+

- Email Ads Slightly More Influential than Broadcast TV
- Twice as Influenced by Internet Ads as Cable TV

Over the next 90 days (October, November and December), do you plan on spending more, the same or less on [CLOTHING] than you would normally spend at this time of the year?

Please tell us which of the following media influences your CLOTHING purchases?

2% difference is statistically significant

Holiday Shopper Playbook

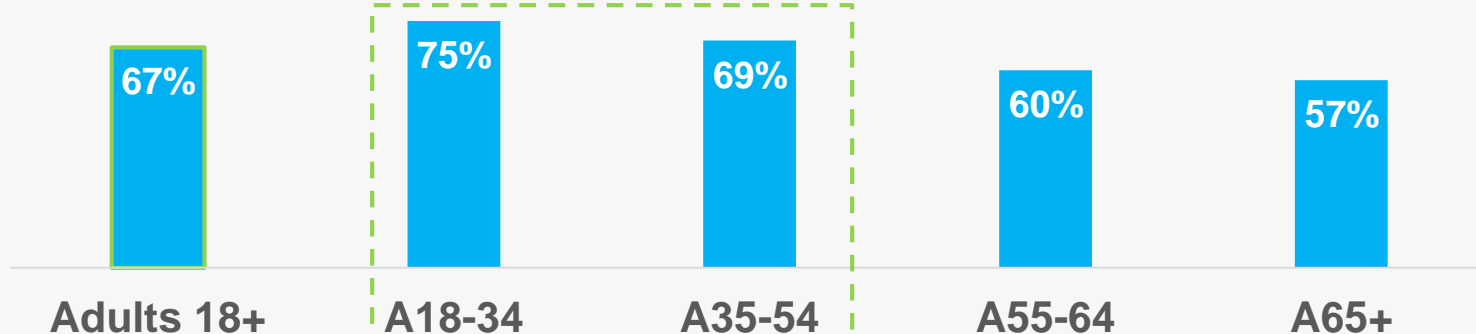
Electronics

Two-Thirds of US Adults Plan to Spend the Same Amount or More on Electronics than Last Year

- Most Will Spend at Least as Much on Electronics as They Did Last Year at This Time, Especially 18-54 Year Olds
- Most will Spend at Least as Much Online During This Season as They Did Last Year

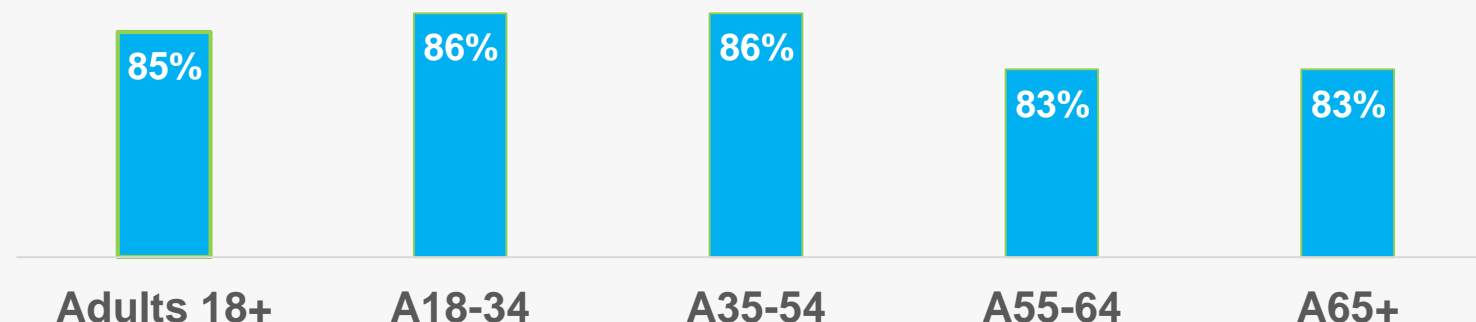
Plan to Spend Same or More on Electronics

Over Next 90 Days than Normally Spend This Time of Year



Plan to Spend Same or More Online

Over Next 90 Days than Normally Spend This Time of Year



Across Age Groups, Consumers are More Likely to Shop for Electronics Online Than in a Store

- 18-34 Year Olds are Nearly Twice as Likely to Shop for Electronics via Mobile
- Almost Half Research Electronics Online Before Buying, Especially 18-54 Year Olds

A18+

A18-34

A35-54

A55-64

A65+

How They Shopped (in the Past 30 Days) for Electronics:

Electronics:

Physical Store

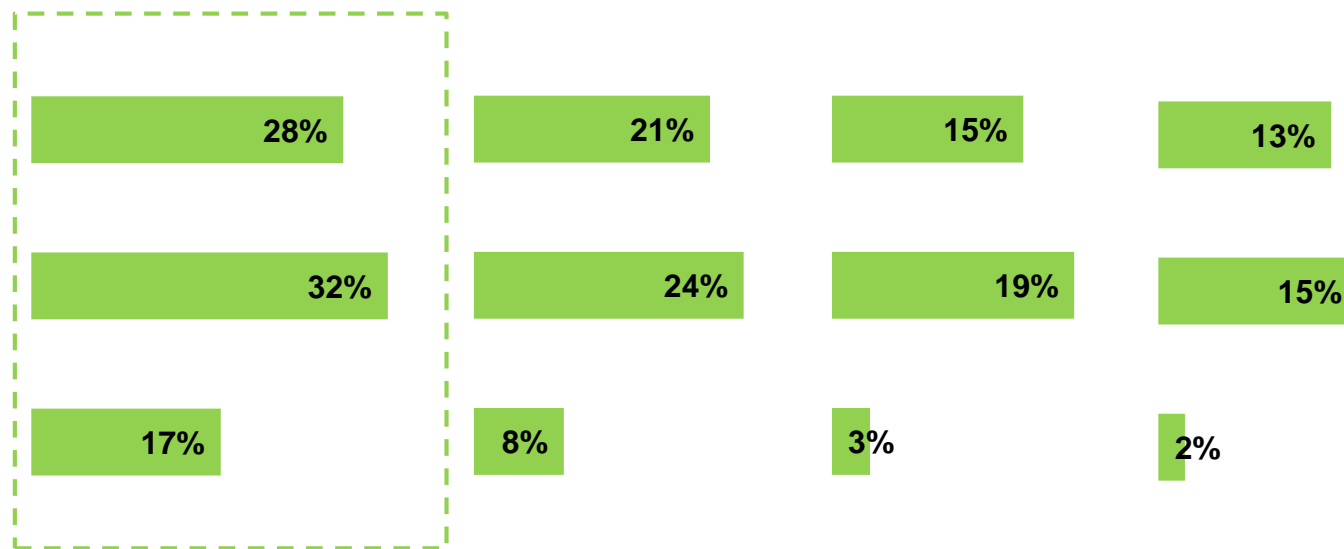
21%

Online

24%

Mobile

9%



Percent who **Researched Electronics Online Before Buying** in past 90 days:

43%

50%

47%

38%

29%

In the past 30 days, how have you shopped for the following products? (Check all that apply)

Over the last 90 days which types of products did you research online before buying them in person? (ELECTRONICS)

2% difference is statistically significant

Top Purchase Influences for Electronics Vary by Age Group

Email Ads and Internet Ads are Among Top 5 Influences on Electronics Purchases Across Age Groups

A18+

A18-34

A35-54

A55-64

A65+

Top 5 Electronics Purchase Influences

36%

Word of Mouth

28%

In Store Promotion

25%

Broadcast TV, Read Article

22%

Internet Ads, Email Ads, Direct Mail

20%

Coupons

39%

In Store Promotion

37%

Word of Mouth

32%

Direct Mail

31%

Internet Ads

30%

Radio, Broadcast TV

38%

Word of Mouth

28%

In Store Promotion

26%

Broadcast TV

24%

Read Article

23%

Email Ads

35%

Word of Mouth

26%

Read Article

23%

In Store Promotion, Broadcast TV

20%

Email Ads, Ad Inserts

19%

Internet Ads

30%

Word of Mouth

22%

Read Article

17%

Broadcast TV

16%

In Store Promotion

13%

Email Ads, Ad Inserts

Please tell us which of the following media influences your ELECTRONICS purchases?
2% difference is statistically significant

Overall Media Influence on Electronics Purchases

• Internet Ads and Email Ads are Among Top 5 Overall Purchase Influences for Electronics

Top 5 Overall Influences on Electronics Purchases:

A18+

- 2 out of Top 5 Influences on Electronics Purchases are Digital: Email Ads, Internet Ads
- More Influenced by Internet Ads or Email Ads than by Cable TV

A18-34

- More Influenced by Internet Ads than by TV
- Word of Mouth is not #1 Influence
- Reading Article is not a Top 5 Influence

A35-54

- Email Advertising is a Top 5 Influence
- Internet Ads, Email Ads More Influential than Cable TV

A55-64

- 2 out of Top 5 Influences are Digital: Email Ads, Internet Ads
- Read an Article on Product is the #2 Purchase Influence, providing Native Ad opportunities
- More Influenced by Internet Ads or Email Ads than by Cable TV

A65+

- Less Influenced by Any Media but Email Ads are a Top 5 Influence
- Reading an Article is the #2 influence, providing Native Ad opportunities
- More Influenced by Internet Ads or Email Ads than by Cable TV

Over the next 90 days (October, November and December), do you plan on spending more, the same or less on [ELECTRONICS] than you would normally spend at this time of the year?

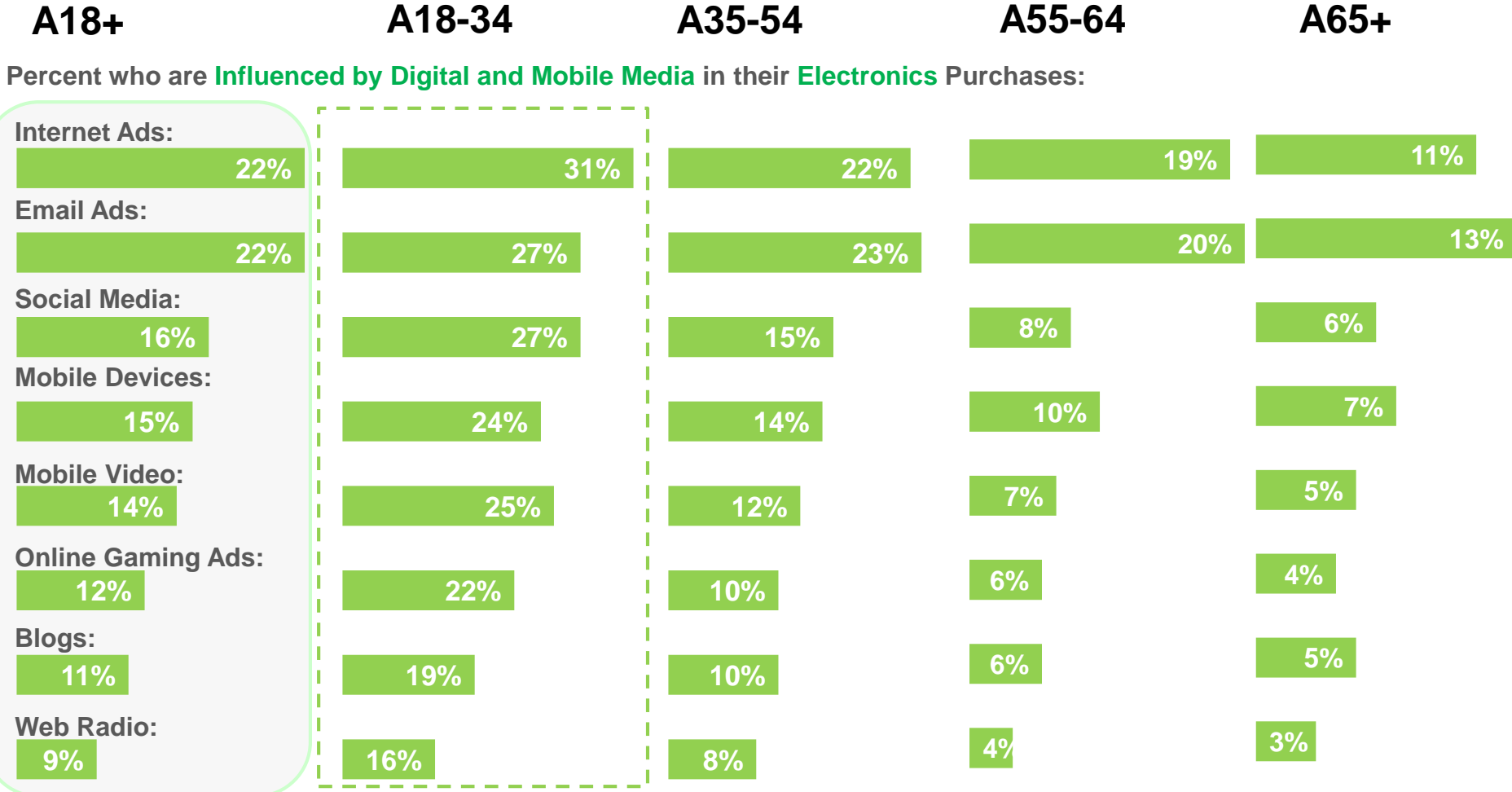
Please tell us which of the following media influences your ELECTRONICS purchases?

2% difference is statistically significant

Digital Media Influences Electronics Purchases

Nearly 1 in 4 are Influenced by Internet Ads or Email Ads

18-34 Year Old Electronics Shoppers are Most Likely to be Swayed by Digital and Mobile Media

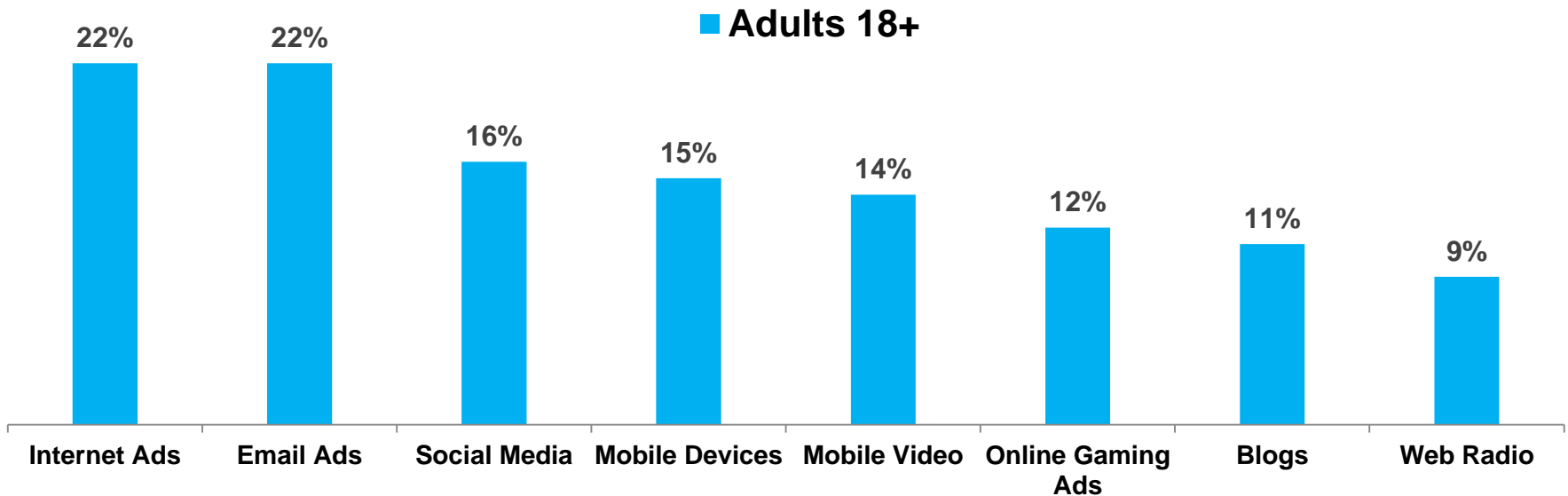


Please tell us which of the following media influences your ELECTRONICS purchases?
2% difference is statistically significant

Internet and Email Ads Influence 22% of US Adults in Their Electronics Purchases

- Nearly 1 in 4 US Adults say Internet Ads and Email Ads influence their Electronics purchases
- More are Influenced by Email Ads or Internet Ads than Cable TV (17%) in their Electronics Purchases

Percent who are Influenced by Digital and Mobile Media in their Electronics Purchases

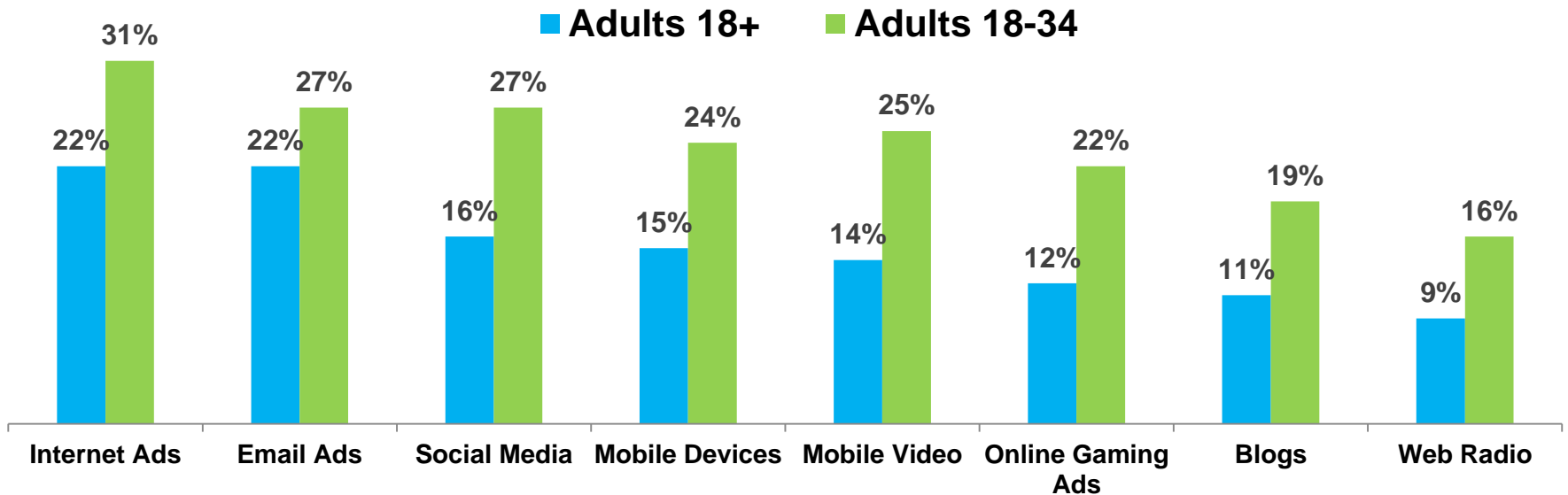


Please tell us which of the following media influences your ELECTRONICS purchases?
2% difference is statistically significant

18-34 Year Olds are Most Likely to Be Influenced by Digital and Mobile Media in Their Electronics Purchases

- Nearly 1 in 3 is Influenced by Internet Ads, Roughly 1 in 4 by Email, Social or Mobile, Nearly 1 in 5 by Online Gaming Ads or Blogs
- Social Media is as Influential as Email
- More are Influenced by Internet Ads than Broadcast or Cable TV (26%) in their Electronics Purchases

Percent who are Influenced by Digital and Mobile Media in their Electronics Purchases

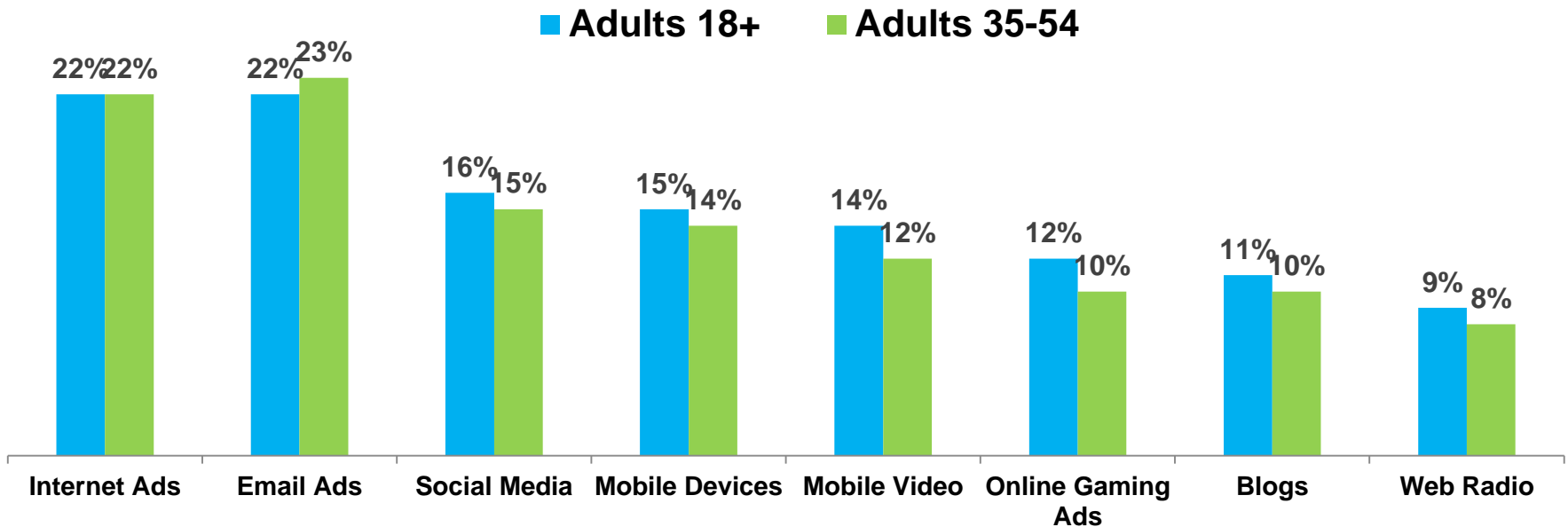


Please tell us which of the following media influences your ELECTRONICS purchases?
2% difference is statistically significant

Digital and Mobile Media Influences the Electronics Purchases of 35-54 Year Olds

- Nearly 1 in 4 Influenced by Internet Ads and Email Ads in their Electronics Purchases
- More are Influenced by Email Ads or Internet Ads than Cable TV (17%)

Percent who are Influenced by Digital and Mobile Media in their Electronics Purchases

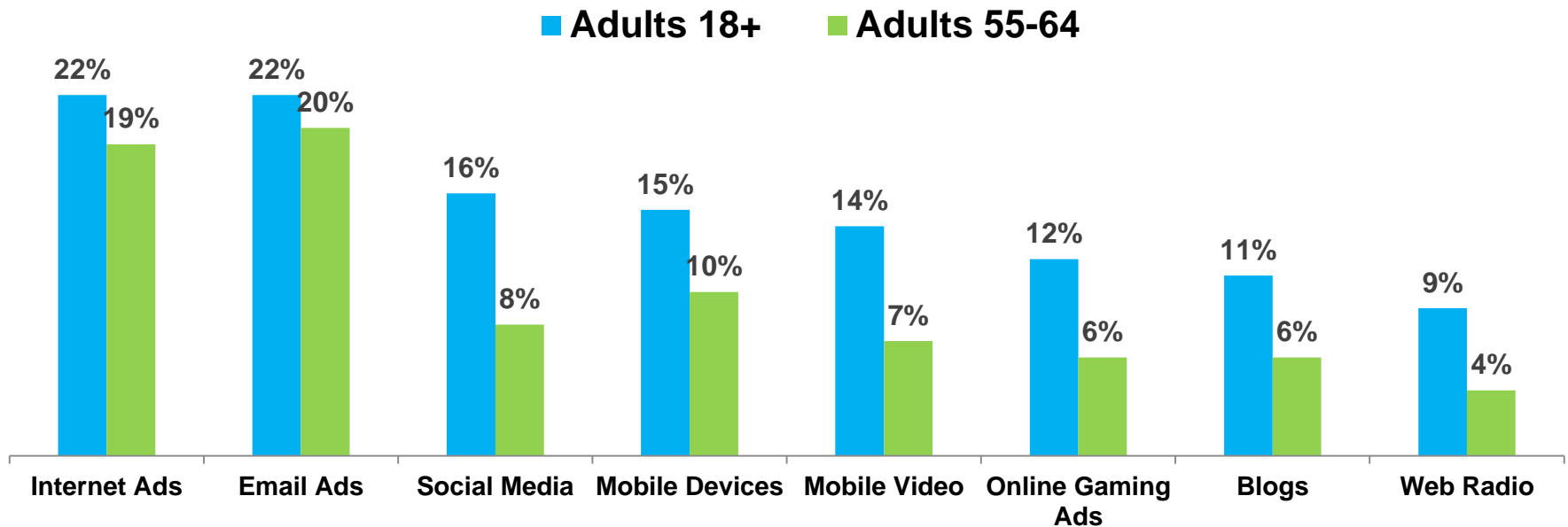


Please tell us which of the following media influences your ELECTRONICS purchases?
2% difference is statistically significant

1 in 5 US Adults Age 55-64 is Influenced by Internet or Email Ads in Their Electronics Purchases

- More are Influenced by Email Ads or Internet Ads than Cable TV (12%)
- Mobile Devices Slightly More Influential than Social Media in Electronics Purchases

Percent who are Influenced by Digital and Mobile Media in their Electronics Purchases

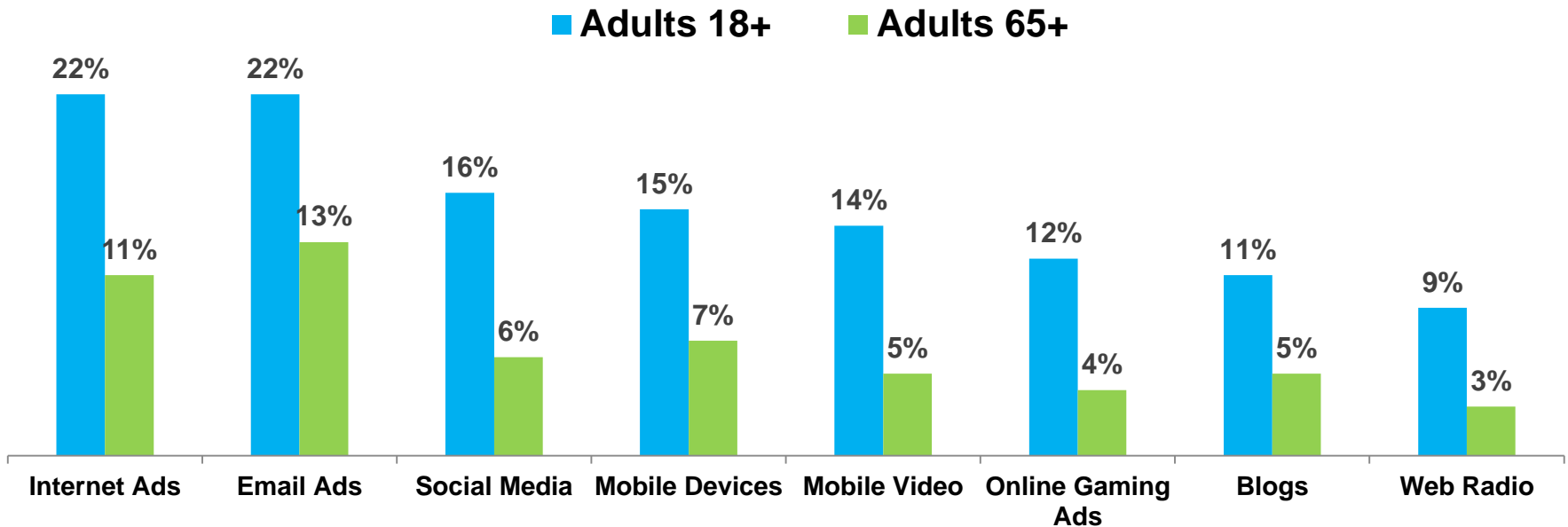


Please tell us which of the following media influences your ELECTRONICS purchases?
2% difference is statistically significant

1 in 10 US Adults 65 and Older Report that Email and Internet Ads Influence Their Electronics Purchases

- More are Influenced by Email Ads or Internet Ads than Cable TV (8%)
- Email Ads are Slightly More Influential than Internet Ads

Percent who are Influenced by Digital and Mobile Media in their Electronics Purchases



Please tell us which of the following media influences your ELECTRONICS purchases?
2% difference is statistically significant

Digital and Mobile Influence on Electronics Purchases

- Younger Electronics Shoppers More Influenced by Digital and Mobile Media

Digital and Mobile Media Influence on Electronics Purchases:

A18+

- Nearly **1 in 4** US Adults say **Internet Ads** and **Email Ads** influence their **Electronics purchases**

A18-34

- More Influenced by **Internet Ads** (1 in 3) than **Email ads** (1 in 4)
- **Social** is as Influential as **Email**
- **1 in 4** Influenced by **Mobile**, esp. **Mobile Video**
- Almost **Twice as likely** as A18+ to be Influenced by **Blogs, Video Game Ads, Web Radio**

A35-54

- Nearly **1 in 4** Influenced by **Internet Ads** and **Email Ads**

A55-64

- Nearly **1 in 5** Influenced by **Internet Ads** and **Email Ads**

A65+

- Nearly **1 in 10** Influenced by **Internet Ads** and **Email Ads**
- **Email Ads** Slightly **More Influential** than **Internet Ads**

Over the next 90 days (October, November and December), do you plan on spending more, the same or less on [ELECTRONICS] than you would normally spend at this time of the year?

Please tell us which of the following media influences your ELECTRONICS purchases?

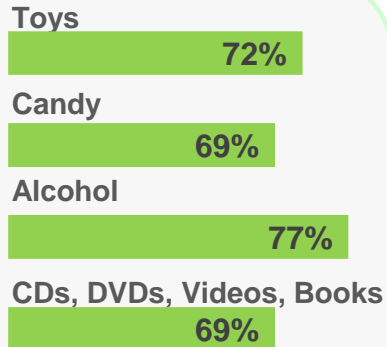
2% difference is statistically significant

Toys And Holiday Related Shopping

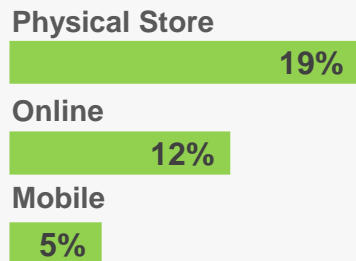
Most will Spend at Least as Much This Season as Last Year on Toys, Candy, Alcohol, Media

- Older Shoppers More Likely to Spend on Media and Alcohol, Younger Shoppers on Toys
- 18-34 Year Olds Twice as Likely to Shop for Toys via Mobile

A18+

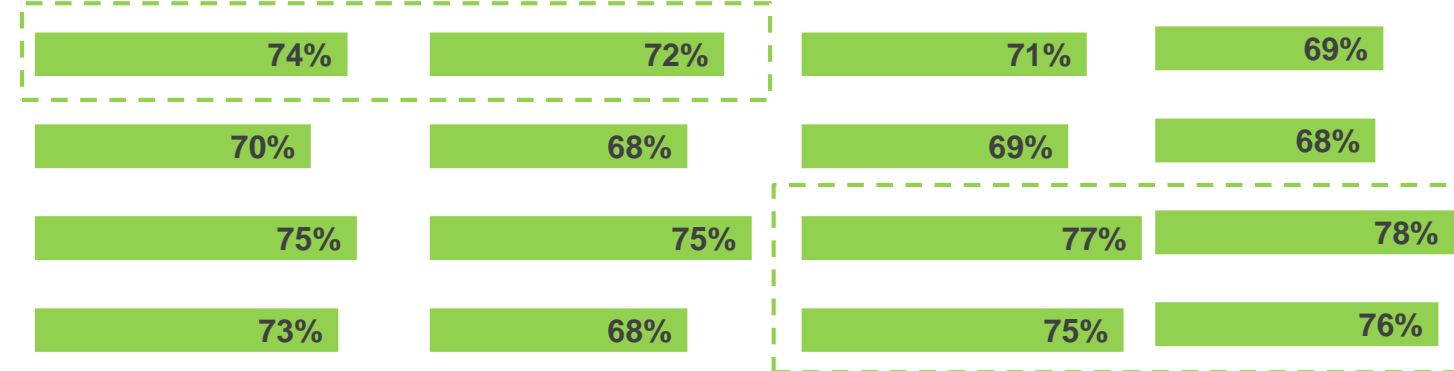


Toys:

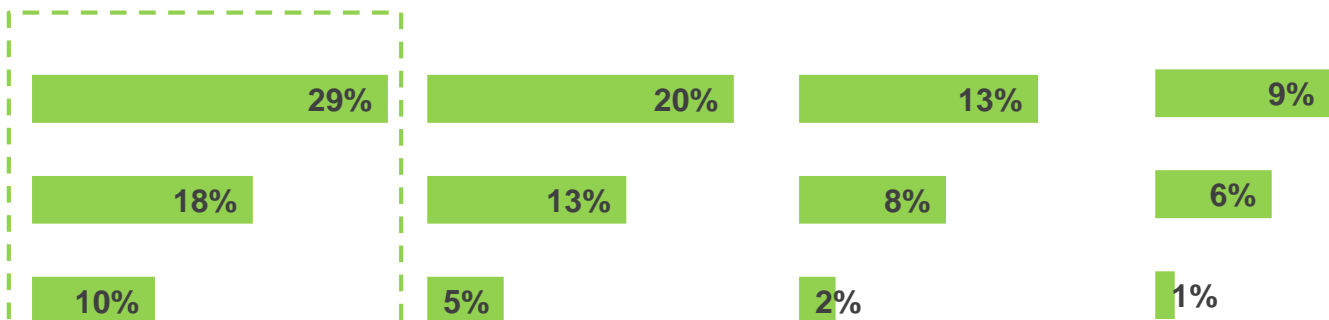


A18-34

Percent who Plan to Spend Same or More (than last year) in next 90 days on:



How They Shopped (in the Past 30 Days):



Over the next 90 days (October, November and December), do you plan on spending more, the same or less on the following items than you would normally spend at this time of the year?

In the past 30 days, how have you shopped for the following products? (Check all that apply) (TOYS)
2% difference is statistically significant

Clothing Shopping: Summary & Implications

● Clothing Shopping for the Holidays:

- **eCommerce:** **85% of US adults plan to spend the same or more online** over the next 90 days (Oct., Nov., Dec.) than they did at this time last year. 86% of 18-54 year olds plan to spend at least as much as last year and 83% of those 55 and older plan to spend the same or more online during this season.
- **Clothing:** Apparel is the top product category sold digitally. Roughly **three-quarters of US adults are planning to spend** at least as much on clothing during this holiday season as they did during last year's: 79% plan to spend the same or more on Children's Clothing this year, 74% on Men's Casual Clothing, 73% on Women's Casual Clothing and 73% on Shoes. Consumers shop for Clothing and Shoes in stores, online and on mobile devices. **Younger shoppers more likely than older consumers to spend** the same or more on Clothing (82% of A18-34 vs. 71% of A65+ on Children's Clothing, 78% of A18-34 vs. 63% of A65+ on Shoes).
- **18-34** year olds are **most likely to spend** the same or more on clothing this holiday season with 82% planning to spend the same or more on Children's Clothing. They are 5 percentage points more likely to spend at least as much as they did last year on Men's Casual Clothing and Shoes and 75% will spend same or more on Women's Casual Clothing. **18-34 year olds are twice as likely to shop for clothing and shoes on a mobile device** than the general population.
- **35-54** year olds are as likely as the general adult population to spend the same or more on Children's Clothing this season as last year and are **more likely to spend the same or more on Casual Clothing and Shoes**.
- **Roughly two-thirds** of **55-64** year olds and those **65 and older** plan to spend the same or more on clothing this season, but at levels lower than 18-54 year olds.

Clothing Shopping: Summary & Implications

● Digital Influence on Clothing Shopping:

- **Digital Influence:** 1 in 4 US adults report that they are influenced by Email Ads and 1 in 5 by Internet Ads in their Clothing purchases. More US adults are influenced by Email (26%) than Broadcast TV (21%) and more by Internet Ads (19%) than Cable TV (13%) in their Clothing purchases. Social Media influence is on par with Cable TV.
- **18-34 year olds** are most influenced by digital and mobile media and ads. 1 in 3 are influenced by Email Ads, 1 in 4 by Internet Ads and 1 in 5 by Social Media. This younger demo is also twice as likely as the general adult population to be influenced by Mobile Video, Blogs or Web Radio. They are more influenced by Email than Broadcast TV in their clothing purchases and more influenced by Internet Ads or Social Media than Cable TV.
- **35-54 year olds** are more influenced in their clothing purchases by Email (27%) than Broadcast TV (23%), more influenced by Internet Ads (19%) than Cable TV (14%). Media influence parallels the general adult population. Roughly 1 in 4 are influenced by Email Ads and 1 in 5 by Internet Ads.
- **55-64 year olds** are slightly less influenced by digital media than the general public. They are more influenced by Email (24%) than Broadcast TV (20%) in their clothing purchases and are more influenced by Internet Ads (16%) than Cable TV (9%). Nearly 1 in 4 are influenced by Email Ads.
- **Adults 65 and older** are less influenced by any media than the general adult population but are more influenced by Email (16%) than Broadcast TV (14%) in their clothing purchases and twice as influenced by Internet Ads (10%) as Cable TV (5%).

Electronics Shopping: Summary & Implications

● Consumer Electronics Shopping for the Holidays:

- **Electronics Shoppers** plan to spend more this year, more online and shop across devices.
- Roughly **two-thirds** (67%) of US adults **plan to spend the same or more on Electronics** over the holiday shopping season. Typically, they are **more likely to shop online (24%) than in a store (21%)** and 9% shopped for Electronics using a mobile device in the past month. If past behavior is a predictor, **43% researched online before buying** Electronics in the past 90 days.
- **18-34 year olds**: Most likely to spend on Electronics, shop online or via mobile. **Three-quarters** (75%) of A18-34 **plan to spend** at least as much as they did last year at this time of year on Electronics. **Nearly one-third** (32%) **shopped online** while 28% shopped in a store and a full 17% of 18-34 year olds **shopped for Electronics using their mobile** devices in the past month, (almost **twice** the rate of the average adult at 9%). **Half research** Electronics online before buying.
- **35-54 year olds**: 69% of 35-54 year olds, slightly more than average, plan to spend the same or more on Electronics than last year over the next 90 days. A little under half (47%) researched before they bought Electronics and, just like the typical US adult, they are more likely to shop online (24%) than in a store (21%).
- **55-64 year olds and 65 and up**: Over half of 55-64 year olds (60%) and those 65 and older (57%) are planning to spend the same or more on Electronics this season and they too are more likely to shop online than in a store.

Electronics Shopping: Summary & Implications

● Digital Influence on Electronics Shopping:

- **Digital Influence:** 2 out of Top 5 overall media influences on Electronics purchases are digital: 22% of US adults report that **Email Ads and Internet Ads** influence their Electronics purchases.
- **18-34 year olds** are more influenced in their Electronics purchases by **Internet Ads** (31%) than by **Broadcast TV** (30%). Unlike other age groups, Word of Mouth is not the #1 influence and Reading an Article is not a Top 5 Influence. **Internet Ads** have a greater influence (1 in 3) than **Email ads and Social Media** (1 in 4). **1 in 4 are influenced by Mobile**, esp. Mobile Video and 18-34 year olds are nearly **twice** as likely as A18+ to be Influenced by **Blogs** (19%), **Video Game Ads** (22%), **Web Radio** (16%).
- **35-54 year olds:** Digital influence mirrors adult population. Email Advertising is a Top 5 Influence. Nearly **1 in 4 are influenced** in their Electronics purchases by **Internet Ads or Email Ads**.
- **55-64 year olds:** 2 out of Top 5 Influences are Digital. Nearly 1 in 5 are influenced in their Electronics purchases by Internet Ads and Email Ads. **Reading an Article** on Product is the #2 purchase influence, **providing Native Ad opportunities**.
- **Adults 65 and older:** Nearly 1 in 10 are influenced in their Electronics purchases by Internet Ads and Email Ads. Less Influenced by any media but Email Ads are a Top 5 influence. **Reading an Article** is the #2 influence, **providing native ad opportunities**.

Toys & Other Holiday Shopping: Summary & Implications

● Toys and Other Holiday Shopping:

- **Toy Shoppers** plan to spend more this year, more online and shop across devices. Roughly three-quarters (72%) of US adults plan to spend the same or more on Toys over the holiday shopping season. Last month 19% shopped in a physical store for Toys while 12% shopped online and 5% shopped on their mobile device. 69% will spend at least as much as last year on Candy, 77% on Alcohol and 69% on CDs, Books, Videos and DVDs.
- **18-34 year olds:** Three-quarters (74%) of A18-34 plan to spend at least as much as they did last year at this time of year on Toys. 29% shopped in a store while 18% shopped online and 10% of 18-34 year olds shopped for Toys using their mobile devices in the past month. Twice as many 18-34 year olds shopped for Toys via mobile than did typical US adults. Spend plans for Candy (70%) and Alcohol (73%) are average with slightly more on Media (73%).
- **35-54 year olds:** 72% of 35-54 year olds plan to spend the same or more on Toys than last year over the next 90 days. 20% shopped in a store while 13% shopped online and 5% of 35-54 year olds shopped for Toys using their mobile devices in the past month, similar to the typical US adult. Spend plans for Candy (68%), Alcohol (75%) and Media (68%) are average.
- **55-64 year olds and 65 and up:** Over two-thirds of 55-64 year olds (71%) and those 65 and older (69%) are planning to spend the same or more on Toys this season. Slightly more than average will spend at least as much as last year on Media (75%, 76%) and spend plans for Candy (69%, 68%) and Alcohol (77%, 78%) are average.

IAB 2015

Holiday Shopper Playbook

Guide to Holiday Shoppers and Digital Influence
on Clothing and Electronics Purchases

Questions?

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