



Maritz Research Canada

2010 Holiday Shopping Poll

Nancy Poirier
Rob Daniel
Maritz Research Canada

About This Research

Maritz Research Canada provides consultative services based on primary marketing research to many of Canada's top companies and organizations. This report is based on an online survey conducted among 1,500 Canadians who plan to take part in holiday shopping in the 2010 holiday season. The survey was conducted in November, 2010.

Table of Contents

2010 Holiday Shopping Poll

Spending	4
Methods of Payment	5
Shopping Lists	6
Timing of Holiday Shopping	8
Purchase Location	9
Retailers	11
Holiday Shopping Experiences	12
Loyalty Programs	13
Entertainment and Traditions during the Holiday Season	14
Appendix: Survey Results	15



Spending

Positive Outlook for Retailers: 2010 Planned Holiday Spend Up Over Previous Two Seasons

Retailers can breathe a sigh of relief as 90% of Canadians will participate in gift-giving this holiday season and may be more inclined to open up their wallets than they have been in the past two years. Although expected spend has not returned to pre-recession levels, Canadian holiday shoppers plan to spend an average of \$602, a modest improvement of 6% over the 2008 and 2009 holiday seasons.

“While the effects of the recent slow downs have not completely dissipated, projected holiday spending is moving in the right direction. This is good news for retailers who view the holiday season as the most important time of year for revenue”, says Rob Daniel, Managing Director, Maritz Research Canada.

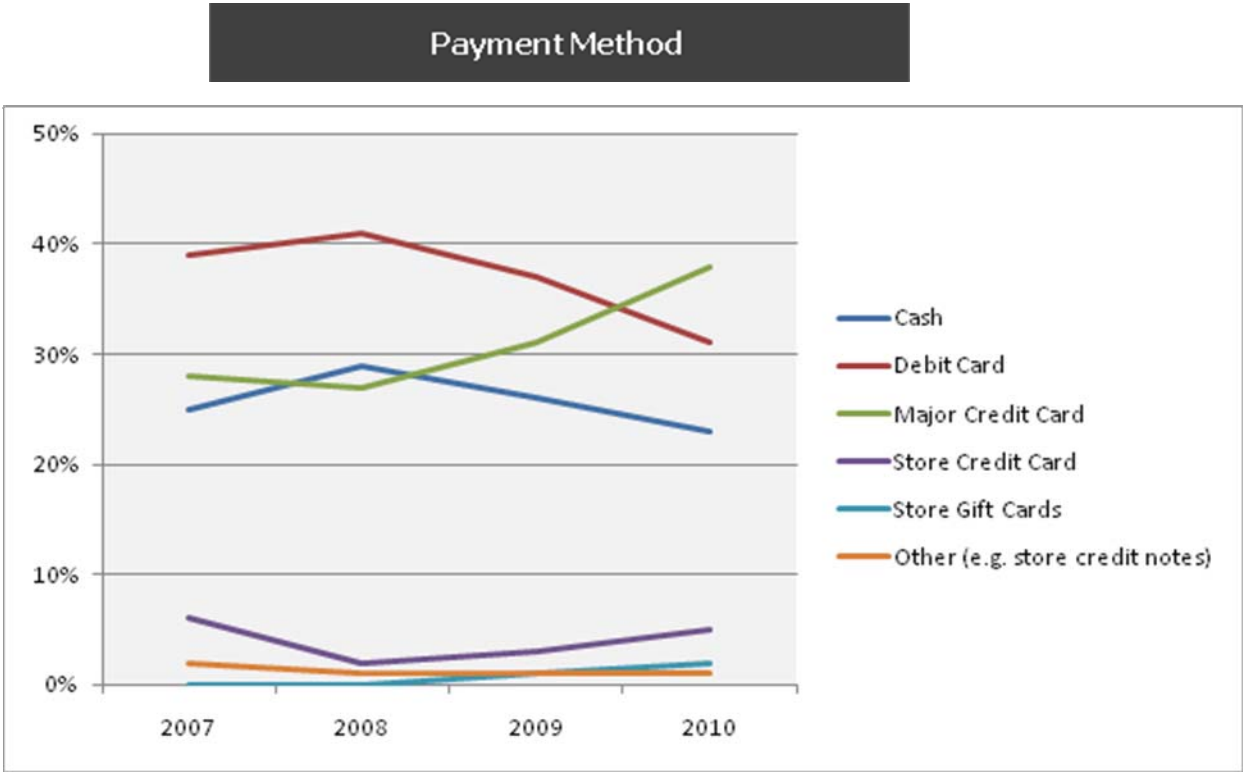


Consistent with last year, per-person spending is highest among Atlantic Canadians, and is slightly higher among males than females. Canadians aged 35 plus anticipate spending more than their younger counterparts and those with children or who are married or common-law expect to spend more than those who are not.



Methods of Payment

Canadians anticipate using their credit cards more this holiday season than they have in the previous years. 43% of Canadian holiday shoppers plan to use their credit card for holiday purchases, up from 34% in 2009 and 29% in 2008. As credit spending increases, debit and cash purchases will account for fewer transactions (only 54% in 2010 compared to 63% in 2009 and 70% in 2008). Retailers should note that credit driven spending during the holiday season may be off set by a slower January and February when the bills come in.



Credit Card spend is partially driven by attractive loyalty point currency attached to many popular cards. One-half of Canadians agree (50%) that they choose how they will pay based on what will give them the most loyalty points. This perception is particularly strong (61%) among those who plan to use credit cards this holiday season.

Rob Daniel says "Canadians are largely well aware of loyalty program benefits and many will see the holiday shopping season as the perfect time to collect points with their favourite programs or redeem for desired rewards."



Shopping Lists

While clothing and apparel remain the top gift of 2010, gift cards are becoming an increasingly popular choice for Canadians. One-half of holiday shoppers are planning to give gift cards this year (49%), up from 45% in 2009 and 39% in 2008. Average anticipated spend in this category is \$147, which represents 24% of a consumer's holiday shopping spend. Many Canadians, particularly females, would put gift cards at the top of their holiday wish list - 20% of females say it is the one gift they hope to receive. However, electronics remain the most desirable gift to receive among men (27%).

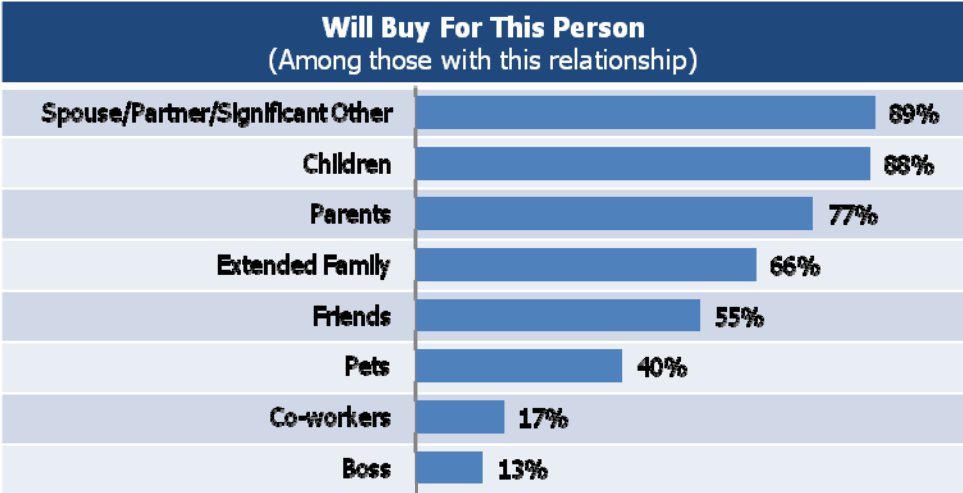
Top Ten Gift Categories For Purchase	2010	2009	2008
Clothing and Apparel	52%	51	35
Gift Cards	49	45	39
Entertainment (e.g. DVDs, CDs, games)	48	49	57
Toys	43	41	41
Beer, Wine, Spirits	41	39	26
Electronics	37	36	43
Candies/Chocolates	36	36	29
Health, Beauty, Personal Care Products	33	34	37
Children's Apparel	28	25	25
Jewellery, Accessories, Leather Goods	26	25	22

"The flexibility associated with gift cards make them an increasingly popular gift to give and receive" says Rob Daniel.



Consistent with previous years, children and significant others are the most likely to make it onto a Canadian consumers holiday shopping list. Not surprisingly, anticipated spend for these segments is significantly higher than any other group.

Canadians must love their furry friends with more than twice as many consumers purchasing gifts for pets than for their co-workers or bosses. Two-in-five animal owners will purchase a gift for their pet this holiday season with an average spend of \$41 per pet. Many Canadians aren't sure what to do when it comes to giving at the office or work and the habit is increasingly rare.

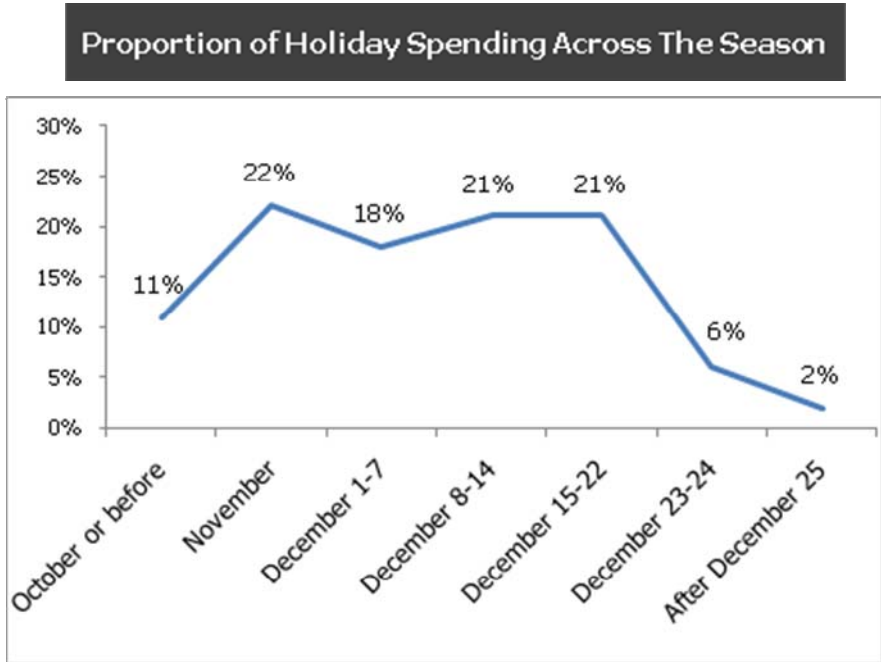


Nearly one-third of holiday shoppers (31%) plan to purchase a gift for someone they will not see during this period. The majority (56%) of those say they will use Canada Post to mail the gift to the recipient, 25% will have a friend or family member deliver it for them and 15% will ship it directly from the retailer's website.



Timing of Holiday Shopping

As usual, retailers should anticipate a busy December as Canadian consumers expect to have only one-third of their holiday shopping completed by the end of November. The biggest procrastinators are males, those 35 to 54 years of age, and Quebecers, who tend to spend more on hosting and entertaining and less on material gifts.



Although holiday spending is up in 2010, many holiday shoppers are still looking for the deals they have seen in the past two seasons. Three-quarters (76%) of holiday shoppers say they hunt for bargains during the holiday season. Furthermore, 40% of holiday shoppers have delayed some or all of their shopping until December, as they expect retailers to offer reduced prices as the holiday season draws closer.



Purchase Location

Online vs. In Store:

While the majority of Canadian consumers remain loyal to traditional brick and mortar purchase channels, online shopping has grown gradually over the past two years becoming a vital aspect of the holiday shopping retail environment. During the 2010 holiday season, 11% of Canadian shoppers say they will make a purchase online, compared to 9% in 2009 and 8% in 2008. Consumers under the age of 35 are the most likely to shop online (16%).

	2010	2009	2008	2007
Online	11%	9	8	8
Stores	85	86	88	88
Catalogue	3	3	3	3
Other	1	2	1	1

Live Entertainment (e.g., tickets for sporting events, concerts, etc.) is expected to be the top gift Canadian consumers plan to purchase online, followed by entertainment (e.g., DVDs, CDs and games). Products that require a consumers sense of smell, touch or taste (e.g., apparel, beauty care products etc.) are less likely to be purchased online.

Top Ten Items Consumers Expect to Purchase Online (Among those who plan to purchase these gift categories)

Live Entertainment (e.g., tickets for sporting events, concerts, etc.)	56%
Entertainment (e.g. DVDs, CDs, games)	30
Hobbies and other specialty goods	23
Electronics	22
Toys	16
Jewellery, Accessories, Leather Goods	15
Footwear	14
Athletic wear and sporting goods	13
Clothing and Apparel	10
Health, Beauty, Personal Care Products	10

So what is driving consumers to make purchases online? In part, the crowds and long line-ups at retail outlets may detract consumers from leaving the comfort of their home. One-third of gift-givers say the crowds and chaotic atmosphere is the worst part of holiday shopping (34%) and 17% are turned off by the long line-ups in stores.



Although online shopping continues to increase, many Canadian gift-givers (68%) try to avoid shopping for holiday gifts online. Atlantic Canadians and those under the age of 35 are most accepting of online purchases during the holiday season.

“Although online shopping remains relatively low, online is often the first face of the store. Retailers are strongly advised to create both a physical and digital connection with consumers.” says Rob Daniel. “Online retailers who provide incentives to consumers may capture the greatest proportion of online shopping dollars in 2010. Many online retailers are providing free shipping for purchases before a specific date, with a minimum purchase required or even without a minimum purchase required”.

South of the Border:

Traffic across the border will be higher this holiday season, as more Canadians intend to travel outside of Canada to purchase gifts in 2010 (16% vs. 11% in 2009). Better prices and deals for the same products and services (59%) is the leading reason Canadians purchase gifts outside of their country, followed by being able to purchase products and services that are not available in Canada (48%). The recent strength of the Canadian dollar may also be lending well to cross border shopping, making the trip more appealing and affordable for consumers.

The majority of Canadians are comfortable purchasing gifts made outside of Canada. Three-quarters (76%) of Canadian holiday shoppers indicate they do not worry about where the gifts they buy are made.



Retailers

Canadian consumers believe a retailer's price is the most prevailing factor when deciding where to shop during the holiday season. Two-thirds (63%) of gift-givers say the prices offered are very influential in choosing retail locations. This may be the reason why Walmart, with their 'Christmas costs less at Walmart' slogan remains the top retail location that consumers expect to shop at again in 2010. Maritz Research asked customers which retailer provides the best price, assortment of products and customer service during the holiday season. Walmart was overwhelmingly the top choice for all three categories. On average, per person spend at Walmart is expected to be \$116 this year.

Top Ten Projected Retail Locations of the 2010 Holiday Season (Proportion of gift-givers anticipating shopping at each retailer)		Spend
Walmart	66%	\$116
Canadian Tire	44%	68
Zellers	41%	75
Future Shop	34%	82
Liquor/Beer Store	34%	71
Sears	31%	76
Costco	29%	117
Toys "R" Us/Babies "R" Us	28%	87
Chapters/Indigo	25%	49
Tim Hortons	24%	28

Level of customer service and availability of staff (44% each) are also largely influential factors when consumers are deciding where to shop. Retailers can use these aspects as a way to differentiate their stores when prices are comparable. Retailers also have the opportunity to win new customers during the holiday season, as one-quarter (24%) of holiday shopping purchases occur at stores customers do not normally shop at.

Rob Daniel suggests that "Retailers should capitalize on the busy holiday season with differentiating customer experience. Lasting positive impressions can lead to customer loyalty for the coming year. Things to focus on include: Staff numbers, staff training, product availability and information, extended hours, intelligent store flow and queues that accommodate large crowds."



Holiday Shopping Experiences

Far from Scrooge:

The good news for retailers is that Canadians care a lot about the gifts they buy during the holiday season. Three quarters (76%) of gift-givers say they put a lot of thought into the items they purchase. In fact, purchasing gifts for loved ones (25%) or the feeling they get when they've found the perfect gift (25%) is their favourite part of holiday shopping. However, some Canadians find the process stressful (17%) and only 22% say they really enjoy holiday shopping.

“Retailers can ease the stress of holiday shoppers by ensuring they have sufficient staff who are well-versed in the store products. Taking the time to help customers make these important decisions can lead to confident and happy shoppers” says Rob Daniel.

Similar to previous years, 82% of Canadians say they have had a negative holiday shopping experience in the past. Among those, 56% say they thought twice before eventually returning to the store, and 21% never shopped there again. Negative holiday shopping experiences often lead consumers to vent to others which should be worrisome for retailers. Three-quarters (77%) of consumers who have had a negative holiday shopping experience say they have told others about their episode at the particular store.

Canadian customers provide some insight on what retailers can do to improve the consumer holiday shopping experiences. The top three recommended improvements are ensuring inventory is stocked up to meet customer demand, offering sales and special holiday offers and having enough associates working during the holidays.

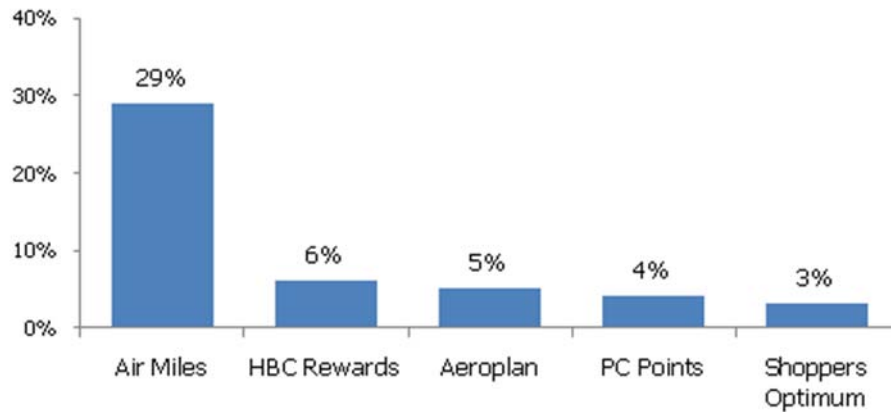
Rob Daniel suggests “Retailers need to remember that getting consumers to make a purchase should be the beginning of their consumer strategy not the end. This is particularly true during the holiday season which presents so many new customers to connect with and engage.”



Loyalty Programs

Loyalty programs continue to be a large part of the holiday shopping experience in Canada. The majority (92%) of Canadian gift-givers belong to at least one loyalty program. Air Miles is the loyalty program that holiday shoppers anticipate accumulating the most points for this holiday season, followed by HBC Rewards and Aeroplan. However, many consumers who anticipate earning loyalty points this holiday season say they will earn points evenly across all the loyalty programs they belong to (32%).

Loyalty Programs Expect to Accumulate the Most Points During 2010 Holiday Season (Among those who expect to accumulate loyalty points)



Loyalty programs help consumers feel more positive about their holiday shopping experiences. Over One-half (56%) of gift-givers agree that knowing they are accumulating loyalty points improves their holiday shopping experience and 47% say they go out of way to shop at retailers where they can earn loyalty points.

Canadian consumers are not only accumulating points during the holiday season, but redeeming them as well. 22% of Canadian consumers plan to redeem loyalty points to obtain a gift for someone on their shopping list.

“Canadians have almost come to expect some type of loyalty or rewards program from retailers. Some Canadians choose retailers based on loyalty programs, and many say that collecting points improves their shopping experience. Retailers should build loyalty program strategies that aren’t just focused on discounting but engaging with customers through meaningful value and communication that matters to them” says Rob Daniel.

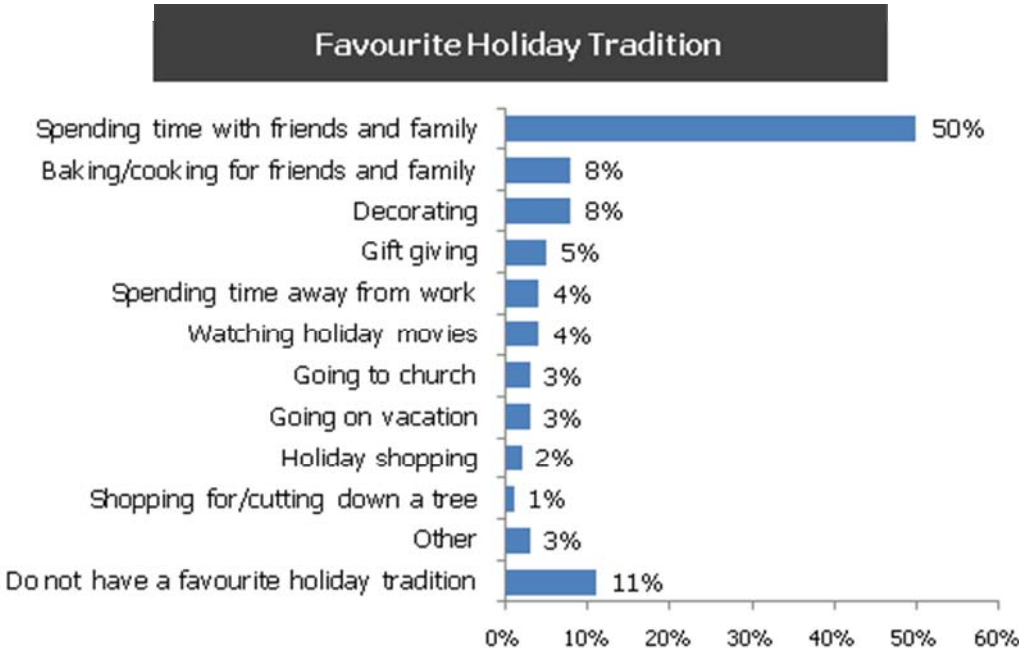


Entertainment and Traditions during the Holiday Season

The majority of Canadians (83%) plan to spend money on items for entertaining (e.g., decorations, alcohol, food, books, and movies) this holiday season. Along with gift purchases, anticipated spend per consumer on items for entertaining is expected to grow this year. On average Canadians expect to spend \$174 on entertainment items, up 13% (\$154) since 2009.

The holiday season is not only lucrative for retailers, but also for restaurants and movie box offices. Compared to the rest of the year, many Canadians say they go to restaurants (37%), the movies (21%) or the theatre (7%) more often during the holiday season. Consumers under the age of 35 are the most likely to take part in these entertainment activities during this period.

Entertainment activities also lend well to Canadians favourite holiday tradition: spending time with friends and family. Although stores are going to be bustling again this year, only 2% of Canadians indicate holiday shopping as their favourite holiday tradition.



Appendix: Survey Results

NOTE: Some percentages may not add to 100% due to rounding

Ninety percent of Canadians plan on holiday shopping in 2010 (the remainder of the results presented in this report are among that 90%).

Do you participate in gift-giving during the holiday season?

	TOTAL	Gender		Income		
		Male (A)	Female (B)	Under \$50k (C)	\$50-100k (D)	\$100k+ (E)
Yes	90%	85	94 ^A	86	93 ^C	96 ^C
No	11	15 ^B	6	14 ^{DE}	7	5

Do you set out with an overall holiday budget?

	TOTAL	Gender		Income		
		Male (A)	Female (B)	Under \$50k (C)	\$50-100k (D)	\$100k+ (E)
Yes, I have a strict budget	21%	22	19	29 ^{DE}	14	12
No, but I have a general target or guideline	66	64	68	59	73 ^C	69 ^C
No, I don't have a holiday gift budget	13	14	12	12	13	19 ^C



2010 Holiday Shopping Poll

Below are a number of different holiday shopping strategies. Please let us know which best describe you:

I usually know exactly what to buy each person	48%	52	I usually don't know what I'm going to buy somebody until I see it
I usually have a budget for each person on my list	60	40	I usually don't know what I will spend on a person until I find the specific gift
I usually put a lot of thought into the gifts I get people	76	24	I generally get them the first or second thing I see that I think they will like
I prefer shopping at malls	68	32	I prefer shopping outside of malls
I buy as many gifts as possible online	32	68	I completely avoid shopping online
I try to ensure that the gifts I buy were made locally	24	76	I don't think about where the gifts I buy are made
I try to buy gifts that support charities or have a charitable element	26	74	I don't think about supporting charities when I am buying gifts
I spend time comparison shopping to ensure I am getting the best deal I can on gifts	74	26	I buy a gift as soon as I find it without doing any comparison shopping
I prefer shopping at one store where I can purchase multiple types of gifts	54	46	I prefer shopping at multiple stores who specialize in specific products

	TOTAL	Region				Age			Gender	
		West (A)	ON (B)	QC (C)	Atl. (D)	18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
I usually know exactly what to buy each person	48%	45	46	59 ^{ABD}	46	46	50	50	44	52 ^H
I usually have a budget for each person on my list	60	56	61	63	64	61	61	58	55	65 ^H
I usually put a lot of thought into the gifts I get people	76	74	75	79	76	76	74	78	69	82 ^H
I prefer shopping at malls	68	64	64	80 ^{AB}	71	67	69	69	69	68
I buy as many gifts as possible online	32	33 ^C	35 ^C	20	48 ^{ABC}	41 ^{FG}	31 ^G	24	34	30
I try to ensure that the gifts I buy were made locally	24	22	26	22	29	18	23	32 ^{EF}	24	24
I try to buy gifts that support charities or have a charitable element	26	26	29 ^C	21	31	24	28	26	25	28
I spend time comparison shopping to ensure I am getting the best deal I can on gifts	74	71	70	84 ^{ABD}	73	79 ^G	76 ^G	65	69	78 ^H
I prefer shopping at one store where I can purchase multiple types of gifts	54	56 ^C	55 ^C	46	61 ^C	58 ^G	56 ^G	46	54	54



During the holiday season, what proportion of your shopping is done at the following?

Mean proportion

	TOTAL	Region				Age			Gender	
		West (A)	ON (B)	QC (C)	Atl. (D)	18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Stores I normally shop at during the rest of the year	76%	77	74	77	77	73	75	79	76	75
Stores I never shop at during the rest of the year	24	23	26	23	23	27	25	21	24	25

For whom will you (or have you already) buy gifts for this holiday season? (NOTE: those who do not have people with this relationship are removed from the base. So, for example, 89% of people with a spouse or significant other plan on purchasing a gift for that person)

	TOTAL	Region				Age			Gender	
		West (A)	ON (B)	QC (C)	Atl. (D)	18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Spouse / Partner / Significant Other	89%	86	88	90	95 ^{AB}	91	88	87	90	87
Children	88	89	85	91 ^B	85	83	88 ^E	90 ^E	83	92 ^H
Parents	77	75	78	77	83	87 ^{FG}	80 ^G	54	73	81 ^H
Extended Family (including siblings, grandparents, nieces, nephews, aunts, uncles, etc)	66	64	68	65	65	78 ^{FG}	66 ^G	53	61	71 ^H
Friends	55	57 ^C	60 ^C	40	65 ^C	61 ^{FG}	52	52	52	58 ^H
Pets	40	43 ^C	44 ^C	27	52 ^C	39	43 ^G	35	36	43 ^H
Co-workers	17	21 ^C	20 ^C	9	20 ^C	20 ^G	20 ^G	10	16	19
Boss	13	13 ^C	18 ^{CD}	6	8	15 ^G	15 ^G	7	13	13
Other	20	21 ^C	25 ^C	11	27 ^C	11	11	33 ^{EF}	16	23 ^H

On average, how much do you plan to spend, per person, this holiday season when buying gifts for the following people? (NOTE: base is those who will buy for this person)

	TOTAL	Region				Age			Gender	
		West (A)	ON (B)	QC (C)	Atl. (D)	18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Spouse / Partner / Significant Other	\$177	177	209	118	195	169	190	170	205	151
Children	173	162	194	135	231	155	194	160	171	174
Parents	96	92	114	76	94	92	102	87	115	82
Extended Family (including siblings, grandparents, nieces, nephews, aunts, uncles, etc)	89	94	99	67	91	76	103	87	102	80
Friends	65	53	85	44	47	73	66	53	87	47
Boss	69	30	98	30	65	90	60	42	103	36
Co-workers	94	40	168	22	42	136	67	76	174	31
Pets	41	23	67	15	24	73	29	20	69	20



2010 Holiday Shopping Poll

Using the 10-point scale below, please rate how much each statement below describes you:

Proportion saying the statement describes them well (9-10 on 10-point scale)

	TOTAL	Region				Age			Gender	
		West (A)	ON (B)	QC (C)	Atl. (D)	18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
I really enjoy holiday shopping	22%	19	24	23	27	31 ^{FG}	20	17	16	28 ^H
I consider myself to be a good gift giver	27	27 ^C	33 ^C	18	27 ^C	28	28	26	22	33 ^H
I find holiday shopping stressful	17	17	16	16	21	13	20 ^E	16	17	16
I hunt for holiday bargains	31	30	32	28	38	33	31	28	24	38 ^H
I am a generous gift giver	22	22 ^C	27 ^C	15	24 ^C	25	23	19	19	25 ^H
I believe giving is better than receiving	39	40 ^C	41 ^C	32	46 ^C	31	40 ^E	45 ^E	35	42 ^H
I would be happy if I never had to buy a holiday gift again	14	16 ^C	15 ^C	9	21 ^C	10	17 ^E	15 ^E	20 ^I	9
I would love to have somebody to do my holiday shopping for me	12	11	12	12	19	8	16 ^E	13 ^E	16 ^I	9
Holiday shopping puts me in the holiday spirit	27	22	27	31 ^A	33 ^A	35 ^{FG}	25	22	19	35 ^H

Some people do their holiday shopping well in advance of the holidays, while others wait until the last moment. Please tell us how much of your holiday shopping you plan on doing (or have already done) in each of the time periods below:

Average proportion

	TOTAL	Region				Age			Gender	
		West (A)	ON (B)	QC (C)	Atl. (D)	18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
October of before	11%	13 ^C	12 ^C	5	15 ^C	10	9	13 ^{EF}	10	12 ^H
November	22	21	21	23	26	22	20	25 ^F	18	27 ^H
December 1-7	18	15	17	20 ^{AB}	20	17	18	18	17	18
December 8-14	21	20	20	24 ^{ABD}	17	21	22	20	21	21
December 15-22	21	22 ^D	21 ^D	20 ^D	15	21	22 ^G	18	24 ^I	17
December 23-24	6	7 ^C	7 ^C	4	5	6	7 ^G	4	9 ^I	3
After December 25	2	2	2	2	1	2	2	1	2	1
NET: December 1 or after	68	66	67	70 ^D	58	67	71 ^G	61	73 ^I	60

Have you delayed your holiday shopping this year because you are expecting retailers to offer lower prices and more sales as the holiday season approaches?

	TOTAL	Region				Age			Gender	
		West (A)	ON (B)	QC (C)	Atl. (D)	18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Yes, I have delayed all of my shopping	15%	15	16	13	15	15	18 ^G	11	19 ^I	11
Yes, I have delayed some of my shopping	25	26	25	20	33 ^C	27	23	25	23	26
NET: YES	40	41 ^C	41 ^C	33	48 ^C	42	41	36	42	37
No, I have not delayed any shopping	60	59	59	67 ^{ABD}	52	59	59	64	58	63



Previously you mentioned you are married or have a common-law partner. Which of the following best describes how you and your significant other handle buying gifts that are from both of you?

	TOTAL	Gender	
		M (H)	F (I)
My significant other usually takes care of most of it	16%	32 ^I	2
I do most of the buying for gifts that are from both of us	38%	11	62 ^H
We usually split the shopping list. I handle some and my significant other handles others	14%	20 ^I	9
We usually do this kind of shopping together	29%	36 ^I	23
We don't give gifts from the both of us	2%	1	3 ^H

For you, what is the best thing about holiday shopping?

Purchasing gifts for loved ones	25%
The feeling when I know I've found a great gift	25
Getting into the holiday spirit	13
Finding a good deal on a gift	12
Sticking to my budget	7
Searching for the perfect gift	6
The holiday atmosphere in the stores	8
Something else	5

And, what is the worst thing about holiday shopping?

The crowds and chaotic atmosphere	34%
Long lineups in stores	17
The cost	16
Buying gifts for people who are difficult to buy for	14
Worrying about choosing the right gift for loved ones	10
Finding parking	6
Something else	4



Approximately how much money will you spend on gifts this holiday season?

\$1-199	14%
\$200-399	26
\$400-599	24
\$600-799	10
\$800-999	5
\$1,000+	20

	TOTAL	Region				Age			Gender	
		West (A)	ON (B)	QC (C)	Atl. (D)	18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Median	\$500	400	500	300	700	400	500	500	500	450
Average	602	587 ^C	678 ^C	438	782 ^{AC}	509	650 ^E	637 ^E	621	585

What proportion of that amount will you spend purchasing gifts using the following channels?

Mean proportion

	TOTAL	Region				Age			Gender	
		West (A)	ON (B)	QC (C)	Atl. (D)	18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Online	11%	13 ^C	12 ^C	8	13 ^C	16 ^{FG}	10	8	12	11
At stores	85	83	84	89 ^{ABD}	82	81	86 ^E	87 ^E	84	85
Through a Catalogue or over the phone	3	3	3	2	3	3	3	2	3	3
Other	1	1	1	-	2	-	1	2 ^{EF}	1	1



At which stores will you shop to purchase holiday gifts this year?

	Proportion Planning to Shop at Store	Anticipated Spend (at least 3% proportion)
NET: Department/Discount Stores	89%	
Walmart	66	\$116
Zellers	41	75
Sears	31	76
Costco	29	117
The Bay	22	71
Other	4	--
NET: Electronics, Furniture, Appliances, etc.	59	
Future Shop	34	82
Best Buy	23	104
HMV	13	39
EB Games	13	58
Blockbuster	5	28
The Brick	2	--
Music World	2	--
Rogers Plus	1	--
Boutique Electronique	1	--
Leon's	1	--
Centre Hi-Fi	1	--
Other	6	--
NET: Home Improvement, Tools	54	
Canadian Tire	44	68
Home Depot	14	61
Home Hardware	10	44
Rona	9	49
Lowe's	2	--
Reno-Depot	1	--
Other	2	--
NET: Clothing, Apparel, etc.	54	
Winners	19	58
Mark's Work Warehouse	17	70
Old Navy	16	50
Gap	8	72
H&M	7	43
Roots	5	53
American Eagle Outfitters	5	83
Joe Fresh	5	42
Lululemon	4	84
Banana Republic	3	114
Mexx	3	88
Holt Renfrew	2	--
Coach	1	--
Other	12	--
NET: Groceries, Food, etc.	43	
Loblaw's/Zehrs/RCC	21	70
Sobeys/IGA/Foodland	13	68
Metro	9	48



2010 Holiday Shopping Poll

Safeway	6	70
Other	11	--
NET: Children's Stores	39	
Toys "R" Us/Babies "R" Us	28	87
Local/independent children's store	9	57
Children's Place	8	63
Gap Kids/BabyGap	5	61
Gymboree	2	--
Other	5	--
NET: Home Furnishings, etc.	33	
HomeSense	11	47
IKEA	10	60
Home Outfitters	8	39
Sears Home	7	51
Pier 1	5	51
The Bombay Company	3	51
Bowring	2	--
Brault et Martineau	1	--
Mobilia	<1	--
Other	3	--
NET: Jewellery and Accessories Stores	25	
Local/independent jewellery store	11	99
People's Jewellers	5	97
Swarovski	3	121
Birks	2	--
Coach	1	--
Tiffany & Co.	1	--
Fossil	1	--
La Swiss	1	--
Other	5	--
Other Stores		
Liquor/Beer Store	34	71
Chapters/Indigo	25	49
Tim Horton's	24	28
Shopper's Drug Mart	20	44
The Body Shop	10	39
Starbucks	9	31
London Drugs	7	47
Jean-Coutu	7	33
Rexall/PharmaPlus	4	38
Pharmaprix	4	47
Second Cup	2	--
Other	6	--
Online Markets, Retailers		
eBay	18	66
Amazon	14	79
Kijiji	5	48
Craigslist	1	--
Other	8	--



Top Ten Projected Retail Outlets of the 2010 Holiday Season – By Customers	
1. Walmart	66%
2. Canadian Tire	44
3. Zellers	41
T-4. Future Shop	34
T-4. Liquor/Beer Store	34
6. Sears	31
7. Costco	29
8. Toys "R" Us/Babies "R" Us	28
9. Chapters/Indigo	25
10. Tim Horton's	24

Of the total amount you plan to spend on holiday gifts this year, what proportion of this amount do you plan to pay by the following methods?

Average Proportion

	TOTAL	Region				Age			Gender	
		West (A)	ON (B)	QC (C)	Atl. (D)	18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Cash	23%	21	25	22	25	25	23	22	24	22
Debit Card	31	30	28	34 ^B	37 ^B	34 ^G	33 ^G	25	28	34 ^H
Major Credit Card	38	41	38	36	35	34	36	46 ^{EF}	40	36
Store Credit Card	5	4 ^D	7 ^D	5 ^D	1	5	5	5	5	5
Store Gift Cards	2	2	2	2	1	3	2	2	2	2
Other (e.g. store credit notes)	1	1 ^D	-	1	-	1	-	1	1	-



Which of the following types of gifts will you be purchasing this year?

	TOTAL	Age			Gender	
		18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Clothing and Apparel	52	48	53	57 ^E	48	57 ^H
Gift Cards	49	47	53 ^G	44	44	53 ^H
Entertainment (e.g. DVDs, CDs, games)	48	58 ^{FG}	51 ^G	36	45	52 ^H
Toys	43	51 ^{FG}	43 ^G	34	35	50 ^H
Beer, Wine, Spirits	41	40	43	41	41	42
Electronics	37	37	41 ^G	31	43 ^I	31
Candies/Chocolates	36	37	34	37	31	39 ^H
Health, Beauty, Personal Care Products	33	37 ^G	32	30	24	40 ^H
Children's Apparel	28	32 ^G	27	24	18	36 ^H
Jewellery, Accessories, Leather Goods	26	24	24	29	27	24
Pet Supplies	22	21	25 ^G	19	19	25 ^H
Hobbies, Other Specialty Goods	19	25 ^{FG}	14	18	15	22 ^H
Home Furnishings, Décor, Houseware	19	22	16	19	13	24 ^H
Home Improvement Products, Including Tools	18	16	20	20	18	19
Gift Baskets	14	17	13	13	13	15
Athletic Wear or Sporting Goods	13	10	16 ^{EG}	11	13	13
Stationary or Cards	12	14	12	10	11	13
Footwear	8	9	9	7	10	7
Live Entertainment	7	11 ^G	7 ^G	4	6	8
Other	10	8	9	14 ^{EF}	10	11

Of the amount you will be spending on gifts this holiday season, approximately how much money will you spend on gift cards?

\$1-99	49%
\$100-199	27
\$200-299	12
\$300-399	5
\$400-499	2
\$500+	5

	TOTAL	Region				Age			Gender	
		West (A)	ON (B)	QC (C)	Atl. (D)	18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Median	\$100	100	100	60	70	50	100	100	100	75
Average	147	129	190 ^{AC}	101	129	133	146	164	168	132



Do you plan to purchase (or already bought) any of the following electronics for holiday gifts this year?

NET: Apple mobile device	13%
iPod	8
iPad	3
iPhone	3
NET: Blackberry Smartphone	4
Curve	1
Torch	1
Storm	1
Bold	1
Pearl	<1
Tour	<1
Other mobile devices	
Mobile phone	5
Tablet/eReader	4
PDA Device	1

In the past year, have you purchased a gift that you read about or saw on a social networking site (e.g., Twitter, Facebook, LinkedIn, Blogs, etc.)?

	TOTAL	Age			Gender	
		18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Yes	5%	8 ^G	5 ^G	1	5	4
No	89	86	87	96 ^{EF}	88	90
Don't know	6	7 ^G	8 ^G	4	7	6

This holiday season, do you plan to purchase (or have already bought) a gift that you read about or saw on a social networking site (e.g., Twitter, Facebook, LinkedIn, Blogs, etc.)?

	TOTAL	Age			Gender	
		18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Yes	4%	6 ^G	4 ^G	1	4	3
No	87	82	86	94 ^{EF}	87	88
Don't know	9	12 ^G	11 ^G	5	9	9



If you could choose one type of gift you would most want to receive this year (at a reasonable price level), what would that be?

	TOTAL	Age			Gender	
		18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Electronics	19%	16	22 ^E	19	27 ^I	12
Gift Cards	17	16	19	17	14	20 ^H
Clothing and Apparel	11	13	9	12	7	15 ^H
Entertainment (e.g. DVDs, CDs, games)	6	7	6	5	8 ^I	5
Jewellery, Accessories, Leather Goods	6	9 ^{FG}	5	4	2	10 ^H
Live Entertainment	6	6	5	6	4	7 ^H
Hobbies, Other Specialty Goods	5	5	4	7 ^F	7 ^I	4
Home Furnishings, Décor, Houseware	5	8 ^{FG}	4	3	2	8 ^H
Home Improvement Products, Including Tools	4	2	4 ^E	6 ^E	8 ^I	1
Beer, Wine, Spirits	3	2	4	5 ^E	6 ^I	1
Athletic Wear or Sporting Goods	2	2	3	3	3	2
Health, Beauty, Personal Care Products	2	2	2	2	1	4 ^H
Footwear	1	2	1	1	1	2
Toys	1	1	1 ^G	1	1	1
Gift Baskets	1	1	1	1	1	1
Candies/Chocolates	1	1	1	<1	1	1
Children's Apparel	<1	1 ^{FG}	-	-	-	1 ^H
Pet Supplies	<1	1	<1	<1	<1	<1
Stationary or Cards	-	-	-	-	-	-
Other	8	7	7	10	9	7

Was the total amount you spent on holiday gifts last year more or less than you had planned to spend?

A lot more (50% or more)	5%
Slightly more (11% to 49%)	23
About what I had planned (within 10%)	55
Slightly less (11% to 49%)	5
A lot less (50% or more)	2
Did not have a planned amount in mind	10

Approximately how much money do you plan to spend on items for entertaining (e.g. decorations, alcohol, food, books or movies) this holiday season?

	Proportion who will spend money on this	Average planned spend
Items for entertaining	83%	\$174



Do you go to any of the following types of entertainment more often during the holiday season?

	TOTAL	Age			Gender	
		18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Restaurants	37%	44 ^{FG}	36	31	38	35
Movies	21	29 ^{FG}	21 ^G	13	20	22
Theatre	7	8 ^G	7	5	8 ^I	5

Thinking about shopping during the rest of the year (outside of the holiday season), which retailer would you miss the most if it went away tomorrow?

Top Ten

1. Walmart	27%
2. Canadian Tire	5
3. Costco	5
4. Zellers	4
5. Sears	4
6. Winners	3
7. The Bay	2
8. Liquor / Beer store	1
9. Loblaws / Zehrs / Real Canadian Superstore	1
10. Future Shop	1

Which retailer provides the best assortment of products during the holiday season?

Top Ten

1. Walmart	35%
2. Costco	8
3. Canadian Tire	5
4. Zellers	5
5. Sears	4
6. The Bay	4
T-7. Future Shop	3
T-7. eBay	3
9. Loblaws / Zehrs / Real Canadian Superstore	2
T-10. Winners	2
T-10. Amazon	2



Which retailer provides the best prices during the holiday season?

Top Ten

1. Walmart	44%
2. Costco	9
3. Canadian Tire	6
4. Zellers	5
5. eBay	3
6. Loblaws / Zehrs / Real Canadian Superstore	3
7. Sears	3
8. Winners	2
9. Future Shop	2
10. Best Buy	2

Which retailer provides the best customer experience and atmosphere during the holiday season?

Top Ten

1. Walmart	19%
2. The Bay	8
3. Sears	7
4. Canadian Tire	5
5. Costco	4
6. Liquor/Beer Store	3
7. Zellers	3
8. Future Shop	3
9. Toys "R" Us/Babies "R" Us	2
10. Amazon	2

What are the most important improvements retailers need to make to improve the holiday shopping experience?

Within the top three most important improvements:

Ensuring inventory is stocked up to meet customer demand	63%
Offering sales and special holiday offers	59
Having enough associates working during the holidays	57
Being open early/late enough and opening on key dates during the holidays	39
Offering a comprehensive, easy to navigate website where you can browse through their Catalogue or shop online	17
Offering environmentally friendly products and services	13
Offering specialty services that are not normally available (e.g. gift wrapping or concierge service)	12
Offering electronic information kiosks available in store	11
Providing shipping for your holiday gift purchases to your home or to the gift recipient's home	10
Having valet parking or available spaces in which to park	10
Offering security stations around the store/mall	7
Other	2



How influential are each of the following when you are choosing retail locations for your holiday shopping?

Proportion saying the attribute is “very influential” (9-10 on a 10-point scale)

	TOTAL	Age			Gender	
		18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Prices offered	63%	65	61	63	55	70 ^H
Level of customer service	44	33	43 ^E	57 ^{EF}	43	45
Availability of staff	44	33	43 ^E	58 ^{EF}	41	47 ^H
Hours of operation	41	40	40	43	38	44 ^H
Availability of parking	35	25	34 ^E	45 ^{EF}	33	36
Proximity to other stores where I am planning to shop	29	31	28	27	22	35 ^H
Ability to call ahead to see whether the product I am looking for is available	22	19	24	23	20	24
Ability to check product availability online before going to the store	23	25	23	20	20	25 ^H
Availability of a loyalty program where I can earn or redeem points with purchases	19	20	20	18	17	22 ^H
Availability of gift-wrapping services	8	7	10	7	11 ^I	6
Availability of valet parking	5	6 ^G	6 ^G	2	6	4
Brand of products offered	26	23	28	27	24	28
Being able to get all my shopping done at one store	26	22	30 ^E	25	24	28

When you have had a negative holiday shopping experience in the past, how did it affect your relationship with the retailer in the future?

	Proportion	Proportion of those who have had a bad experience
I thought twice before shopping there again, but did eventually shop there again	46%	56
I did not let a bad holiday shopping experience affect my relationship with that retailer and I shopped there again	19	23
I never shopped at the retailer again at any time	17	21
I have never had a negative holiday shopping experience	18	--

Have you ever told others about your negative holiday shopping experience at a particular store?

Yes	77%
No	23



Which, if any, of the following types of loyalty programs are you currently a member of?

	TOTAL	Gender	
		M (H)	F (I)
Multi-partner (e.g. Air Miles or Aeroplan)	64%	61	67 ^H
Credit Card (e.g. RBC Visa Avion; BMO Airmiles MasterCard, HBC Rewards MasterCard; Shoppers Optimum MasterCard, etc.)	54	56	51
Debit Cards (e.g. SCENE Day to Day Banking card, PC No Fee Bank Account, etc.)	21	21	22
Retailer (e.g., Shoppers Optimum, HBC Reward, Sears Club, PC Points, Club Sobey's, Chapters/Indigo irewards, etc.)	67	60	74 ^H
Other	4	3	4
None	8	11 ^I	5

On which loyalty program do you expect to accumulate the most points while shopping this holiday season?

Top Five

Airmiles	24%
HBC Rewards	5
Aeroplan	4
PC Points	4
Shoppers Optimum	3
I expect to accumulate points evenly across programs	27
None, I do not expect to accumulate points	17

Thinking specifically about holiday shopping, please rate how much you agree or disagree with the following statements:

	Completely Agree (9-10 on 10-point agreement scale)	Agree (6-10 on 10-point agreement scale)
I choose how I will pay based on what will give me the most loyalty points	19%	50
Knowing that I am accumulating loyalty points improves my shopping experience	17	56
I go out of my way to shop at retailers where I can accumulate loyalty points	12	47
I would pay slightly more for a product if I am accumulating more loyalty points	6	28



Last holiday season, did you redeem loyalty points for a gift?

	TOTAL	Region				Age			Gender	
		West (A)	ON (B)	QC (C)	Atl. (D)	18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Yes	19%	18 ^C	23 ^{AC}	11	25 ^C	17	21	19	16	22 ^H
No	81	82 ^B	77	89 ^{ABD}	75	83	79	82	84 ^I	78

And, have you already or are you planning to redeem loyalty points for a gift this holiday season?

	TOTAL	Region				Age			Gender	
		West (A)	ON (B)	QC (C)	Atl. (D)	18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Yes	22%	21 ^C	26 ^C	16	25 ^C	22	23	20	19	25 ^H
No	78	79	75	84 ^B	76	78	77	80	81 ^I	76

Proportion who plan on spending less money this holiday shopping season than they did last season:

	TOTAL	Region				Age			Gender	
		West (A)	ON (B)	QC (C)	Atl. (D)	18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Plan to decrease spending this season	31%	30	32	28	33	29	32	31	27	33 ^H

From your earlier answers, it appears you are planning to decrease your holiday spending this year. What strategies are you planning to use to do that?

I plan to purchase fewer gifts or spend less on gifts per person	56%
I plan to only give gifts to close relatives and friends, reducing the number of people I will give gifts to	45
I plan to purchase more sale items or inexpensive items as gifts	36
I plan to shop around more to look for bargains on gift items	36
I plan to set a tight gift budget and not go over it	32
I plan to travel only to local malls and shops to save money	16
I plan to make home-made gifts	16
I plan to limit frequent travels to malls and shops to save money on gas	15
I plan to purchase some or all of my gifts online	12
I plan to visit less of my family and friends this holiday season	9
I plan to invest in dinners and get-togethers rather than gifts	9
I plan to take public transportation rather than my car to travel to malls and shops	6
I plan to purchase used or second-hand items as gifts	3
I plan to offer my services (e.g. babysitting or cleaning the house) instead of gifts	2
Other	3



Are you planning to make any gift purchases outside of Canada this holiday season?

	TOTAL	Region				Age			Gender	
		West (A)	ON (B)	QC (C)	Atl. (D)	18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Yes	16%	18 ^C	19 ^C	6	23 ^C	17	14	17	18 ^I	14
No	73	68	68	91 ^{ABD}	70	73	75	73	70	76 ^H
Don't know	11	14 ^{CD}	14 ^{CD}	4	7	11	12	10	12	10

What are your reasons for making gift purchases outside of Canada this holiday season?

Other countries have better prices and deals for the same products/services available in Canada	59%
The products/services that I want to purchase are not available in Canada	48
Enjoy the shopping experience in other countries	20
Other countries have better customer service than Canada	11
Other	16

Do you plan to purchase (or already bought) a gift for somebody you will not see in person during the holiday season?

	TOTAL	Region				Age			Gender	
		West (A)	ON (B)	QC (C)	Atl. (D)	18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Yes	31%	42 ^{BC}	31 ^C	13	39 ^C	27	28	37 ^{EF}	30	31
No	63	51	62 ^A	82 ^{ABD}	58	65 ^G	66 ^G	59	63	63
Don't know	6	7	8	5	4	8	6	5	7	6

How do you plan to give them the gift?

Canada Post	56%
Family/friends will deliver it for me	25
Ship directly from the retailer/website	15
Purolator	4
UPS	3
FedEx	2
DHL	2
Other	7
Don't know	5

Do you plan to use an expedited or regular service?

Regular	69%
Expedited	22
Don't know	10



What is your favourite holiday tradition?

	TOTAL	Age			Gender	
		18-34 (E)	35-54 (F)	55+ (G)	M (H)	F (I)
Spending time with friends and family	50	48	50	51	49	51
Baking/cooking for friends and family	8	8	6	9 ^F	5	10 ^H
Decorating	8	11 ^G	8 ^G	4	5	10 ^H
Gift giving	5	6	5	5	6	5
Spending time away from work	4	5	5 ^G	2	5	3
Watching holiday movies	4	5	4 ^G	2	3	4
Going to church	3	2	2	4 ^F	3	3
Going on vacation	3	2	3	3	4 ^I	2
Holiday shopping	2	5	1	1	2	2
Shopping for/cutting down a tree	1	2	1	1	1	1
Other	3	2	3	2	2	3
Do not have a favourite holiday tradition	11	5	12 ^E	16	16 ^I	6





Maritz®

The Human Dimension of Sales & MarketingSM

Maritz Canada Inc.
6900 Maritz Drive
Mississauga, Ontario
L5W 1L8
maritzcanada.com