

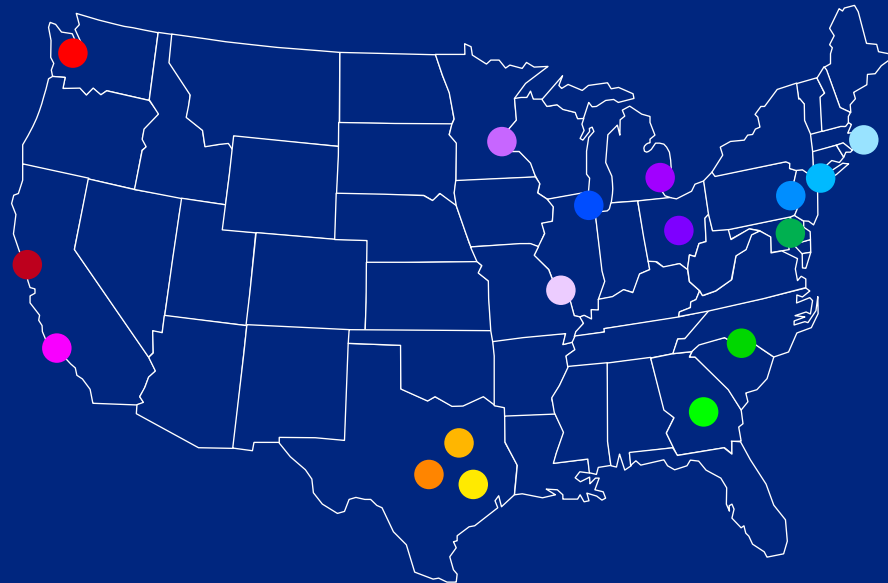
# 2019 ANNUAL HOLIDAY LOCAL SHOPPING SURVEY

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# DEMOGRAPHICS

Coleman Parkes Research, on behalf of Accenture, conducted an online survey of 500 consumers in each of the following 17 cities:



- Los Angeles
- San Francisco
- Seattle
- Austin
- Dallas
- Houston
- Atlanta
- Charlotte
- Washington D.C.
- Boston
- New York City
- Philadelphia
- Chicago
- Columbus
- Detroit
- Minneapolis
- St. Louis

Respondents each had purchased an item for personal use online or in a store within the previous six months. They represented:

<b>50%</b>	Female	<b>49%</b>	Male	<b>1%</b>	Non-binary
<b>20%</b>	Generation Z			aged 18-20	
<b>20%</b>	Younger Millennials			aged 21-27	
<b>20%</b>	Older Millennials			aged 28-37	
<b>20%</b>	Generation X			aged 38-54	
<b>20%</b>	Baby Boomers			aged 55+	

The survey was conducted in August and September 2019.

The **national average** is based on a separate survey of 1,500 U.S. consumers, also conducted by Coleman Parkes for Accenture with respondents split evenly between genders and by age groups.

# EXECUTIVE SUMMARY

2019 Annual Holiday Shopping  
Survey From Accenture

**1**

**Shoppers' 2019 budgets**

**2**

**Consumers still love stores**

**3**

**Sustainability factoring  
into shoppers' decisions**

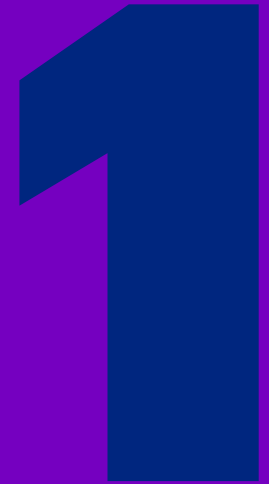
**4**

**Not your grandparents'  
apparel shopping**

**5**

**Physical and online security  
concerns on the rise**

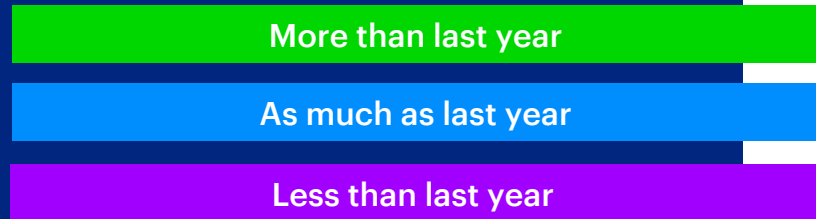
# SHOPPERS' 2019 BUDGETS



# HOW MUCH WILL SHOPPERS SPEND?

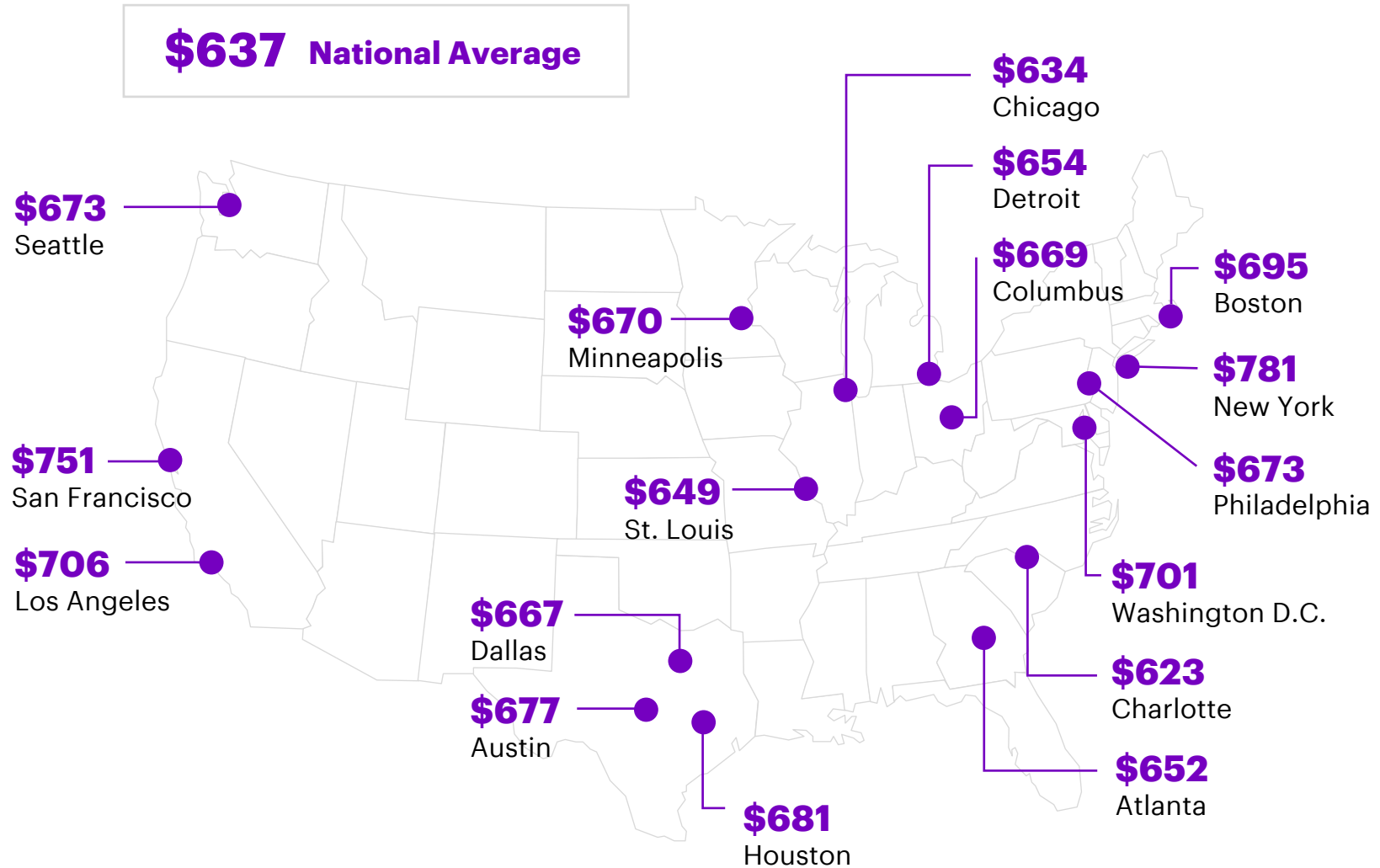
Q: How much money do you plan to spend on holiday purchases this year?

Q: Do you plan to spend more / same / less on holiday purchases in this year vs. last year?



2019	2018
28%	36%
57%	53%
15%	11%

Majority of U.S. shoppers will spend as much or more this year, but with a sign of caution.



# CONSUMERS STILL LOVE STORES

Most shoppers plan to shop in-store  
and online this holiday season.

# 2

# Q: HOW DO YOU ANTICIPATE YOU WILL DO YOUR HOLIDAY SHOPPING?

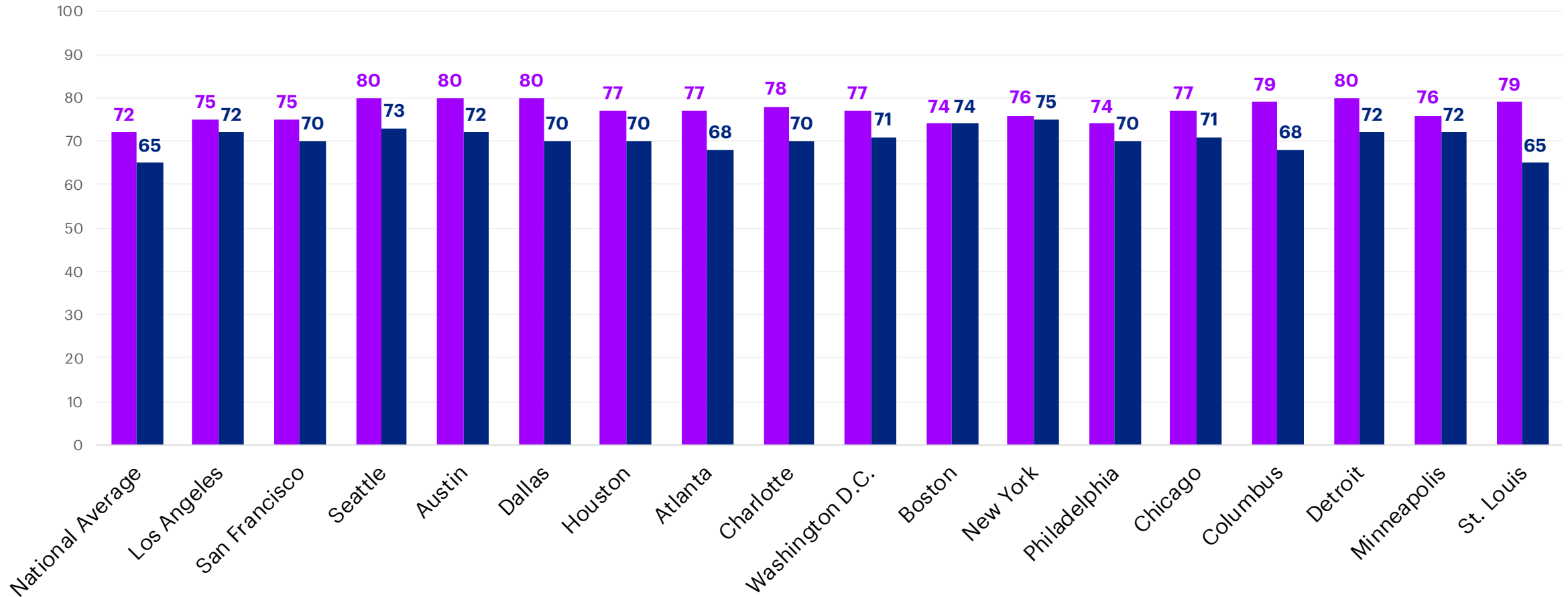
% of shoppers who plan to shop

% of shoppers who plan to shop

**IN-STORE**

**VS.**

**ONLINE**



“

**WHILE HAVING A STRONG ONLINE PROPOSITION HAS BECOME TABLE-STAKES, PHYSICAL STORES WILL STILL PLAY AN IMPORTANT ROLE IN THE FUTURE.**

”

**Jill Standish**

Senior Managing Director and  
Head of Accenture's Global Retail Practice



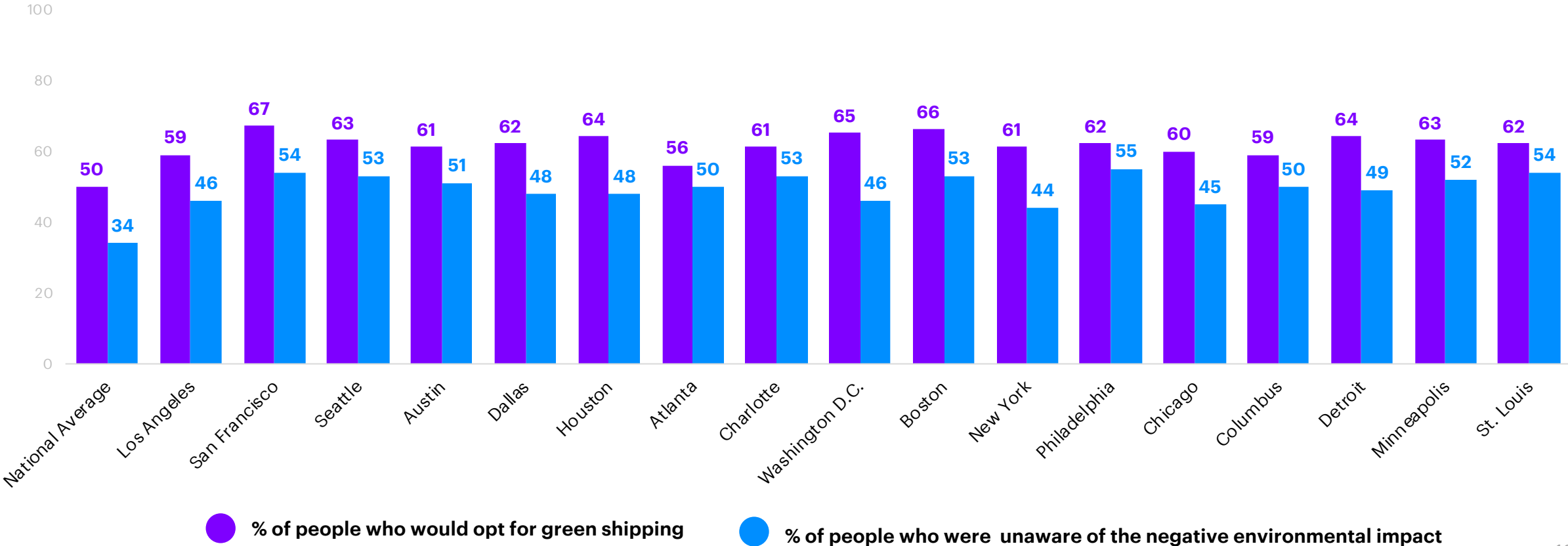
**SUSTAINABILITY  
FACTORING  
INTO SHOPPERS'  
DECISIONS**



# THE DARK SIDE OF NEXT-DAY SHIPPING?

Q. Faster shipping is said to cause greater environmental impact for various reasons, such as the use of planes rather than ground transportation and the shipping of multiple items separately rather than together to expedite delivery. **Are you aware of such impact and would you opt for greener options to reduce your environmental impact this holiday season?**

Some shoppers have not heard of the negative environmental impact of fast delivery options. More than half of shoppers are willing to opt for greener delivery options (e.g. slower shipping, in-store pick-up) in the name of the environment.



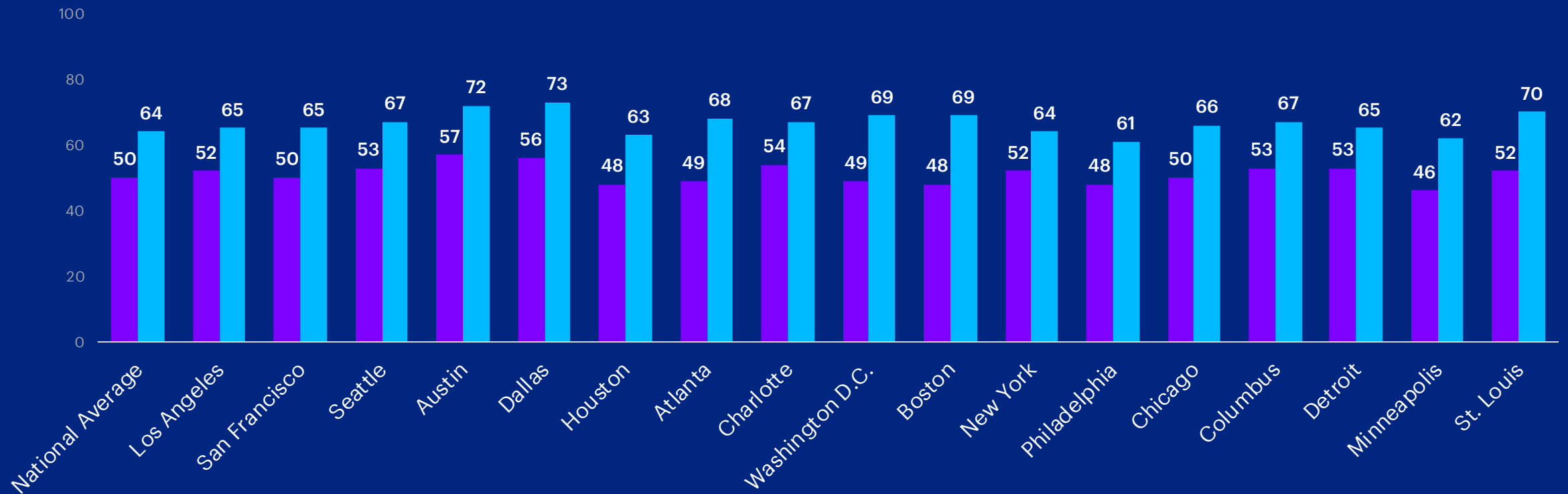


# SHOPPERS ARE WILLING TO FORGO GIFT WRAPPING TO REDUCE PAPER.

Q: How do you feel about not wrapping gifts to avoid using paper this holiday season?

● % of respondents willing to give non-wrapped gifts

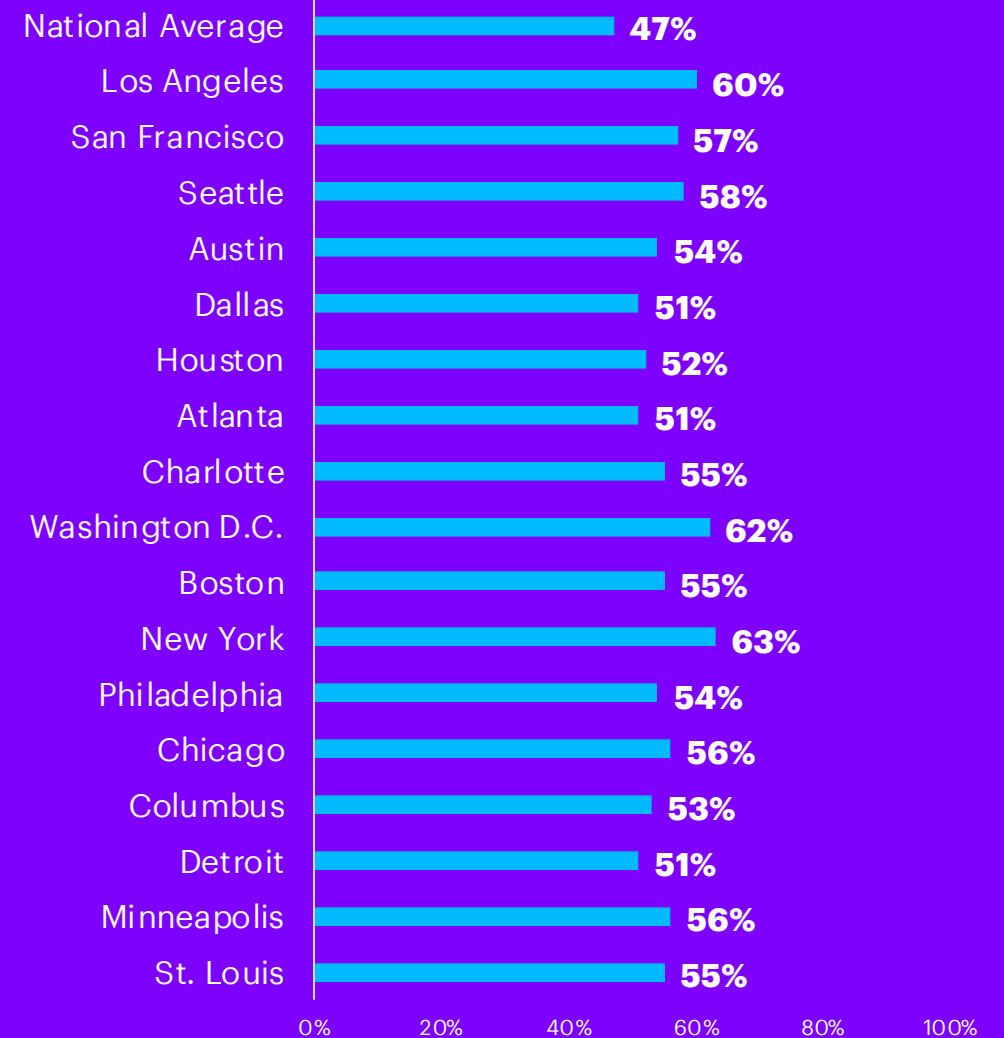
● % of respondents who welcome non-wrapped gifts



# SHOPPERS WANT TO DO BUSINESS WITH ENVIRONMENTALLY- CONSCIOUS RETAILERS.

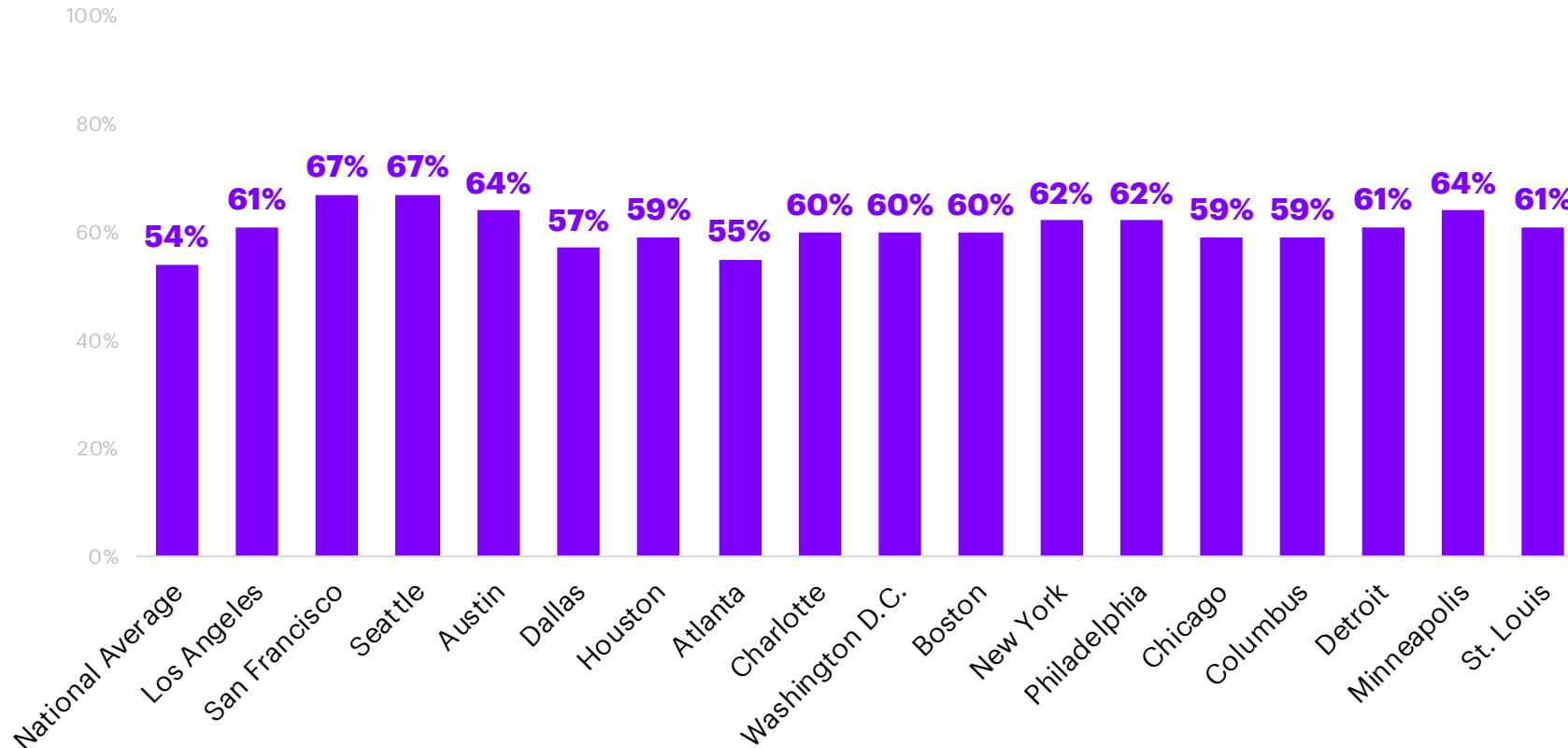


Percentage of respondents who said it's extremely important or very important for retailers to demonstrate environmental awareness when it comes to deciding which retailer to shop with during the holidays.



# SHOPPERS LOOK TO RETAILERS TO HELP THEM **REDUCE THEIR ENVIRONMENTAL IMPACT.**

Q: During the holidays, how likely would you use the following service offered by retailers: **recycling services to reduce waste?**



 % of shoppers who are likely or extremely likely to use recycling services

**“WE HAVE ENTERED THE ERA OF ‘RESPONSIBLE RETAIL,’ WHERE CONSUMERS ARE BECOMING MORE ENVIRONMENTALLY AND SOCIALLY CONSCIOUS AND WILL INCREASINGLY TURN TO BRANDS THAT NOT ONLY TALK ABOUT RESPONSIBILITY, BUT DEMONSTRATE IT THROUGH THEIR BUSINESS PRACTICES.”**

**Jill Standish**

Senior Managing Director and Head of Accenture’s Global Retail Practice

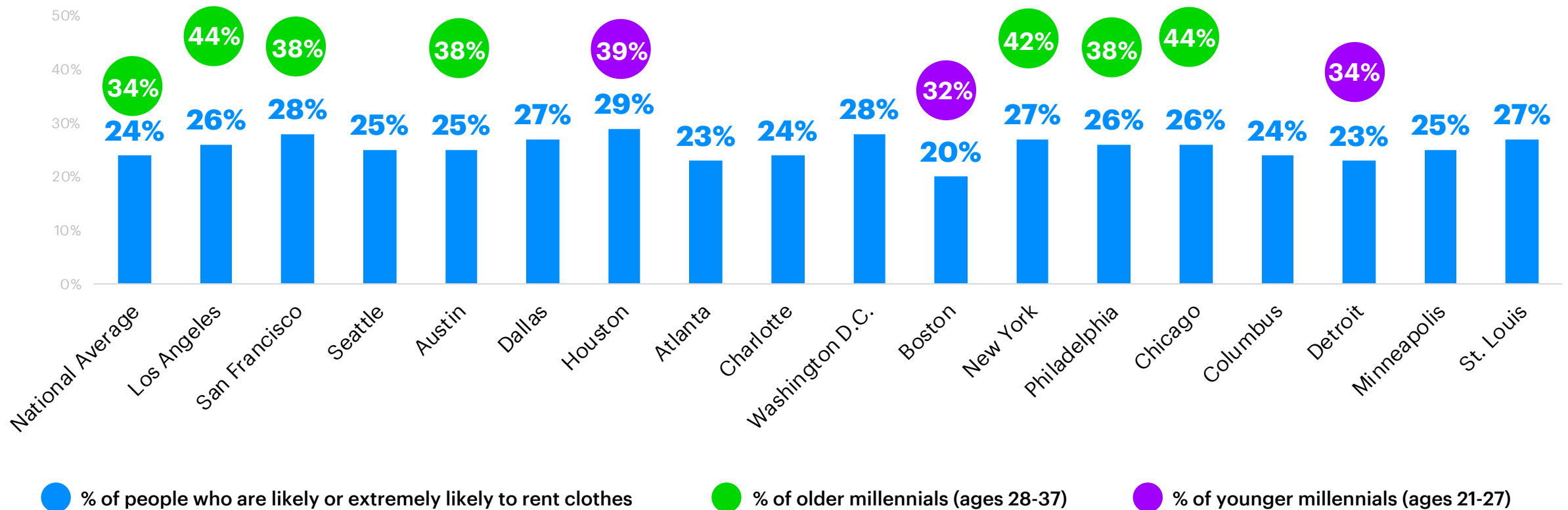
**NOT YOUR  
GRANDPARENTS'  
APPAREL SHOPPING**

**4**

# FASHION RENTAL TREND EXTENDS TO THE HOLIDAYS.

People, especially millennials, plan to rent clothes for holiday parties.

Q: During the holidays, how likely would you use the following services offered by retailers: rent clothes for holiday parties rather than paying full price to own them?

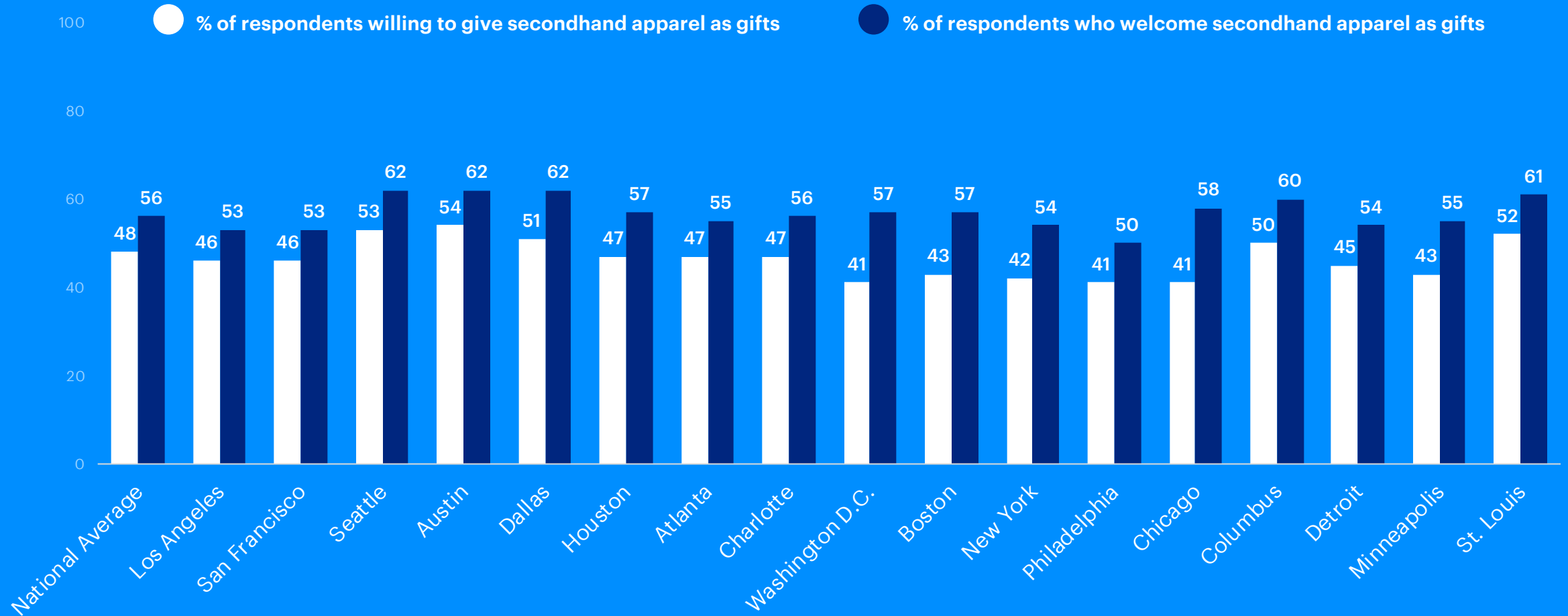




# VINTAGE IN VOGUE?

People are rather open to pre-loved fashion gifts.

Q: How do you feel about giving and receiving second-hand apparel as gifts this holiday season?

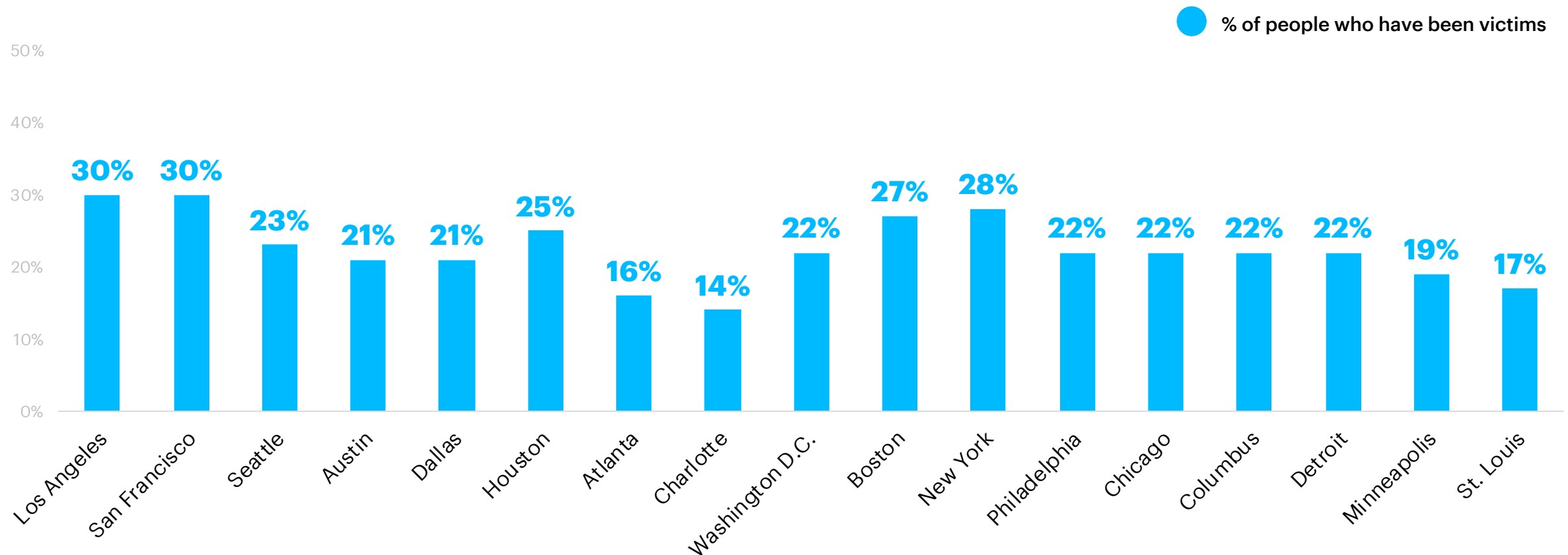


**PHYSICAL AND  
ONLINE SECURITY  
CONCERNS  
ON THE RISE**

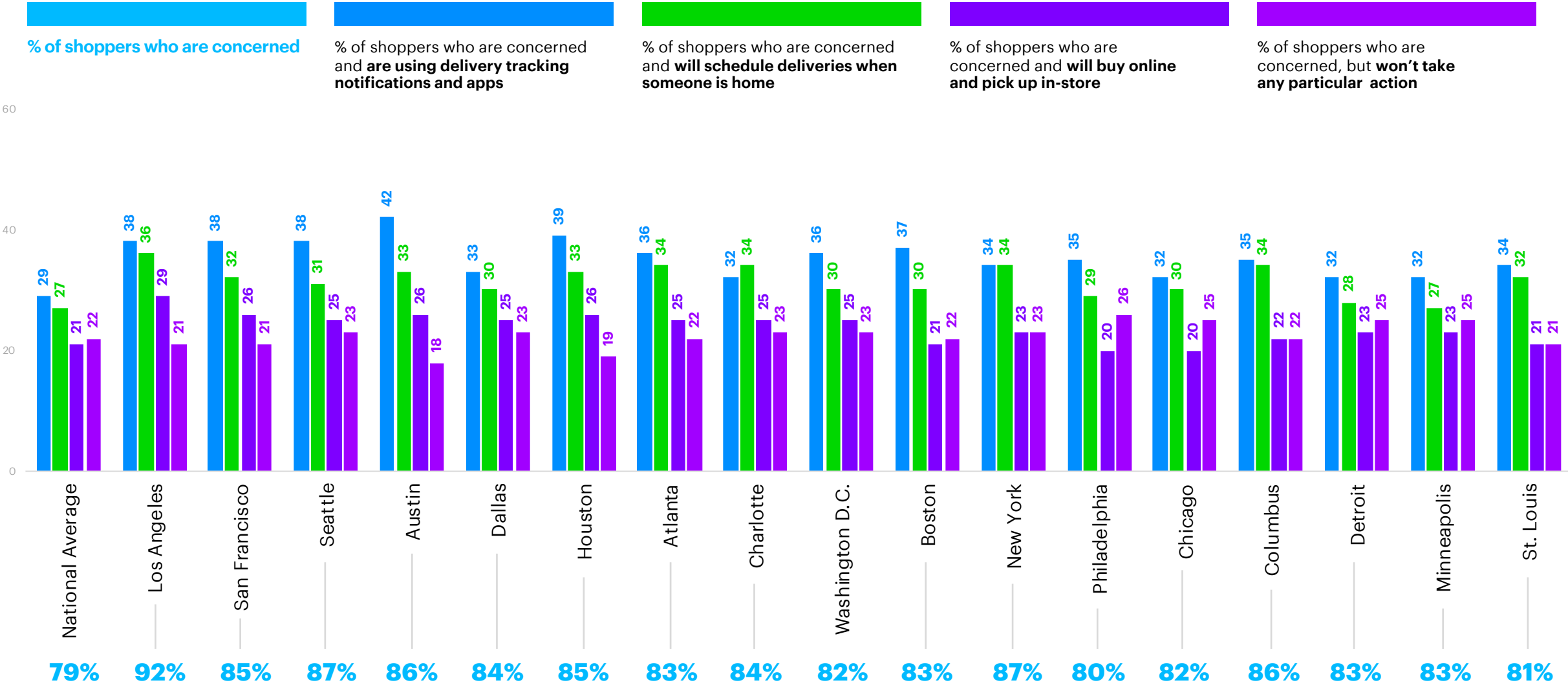
**5**

# UP TO 30% OF PEOPLE IN THESE CITIES HAVE BEEN VICTIMS OF "PORCH PIRATES"

Q: Have you been a victim of package theft?



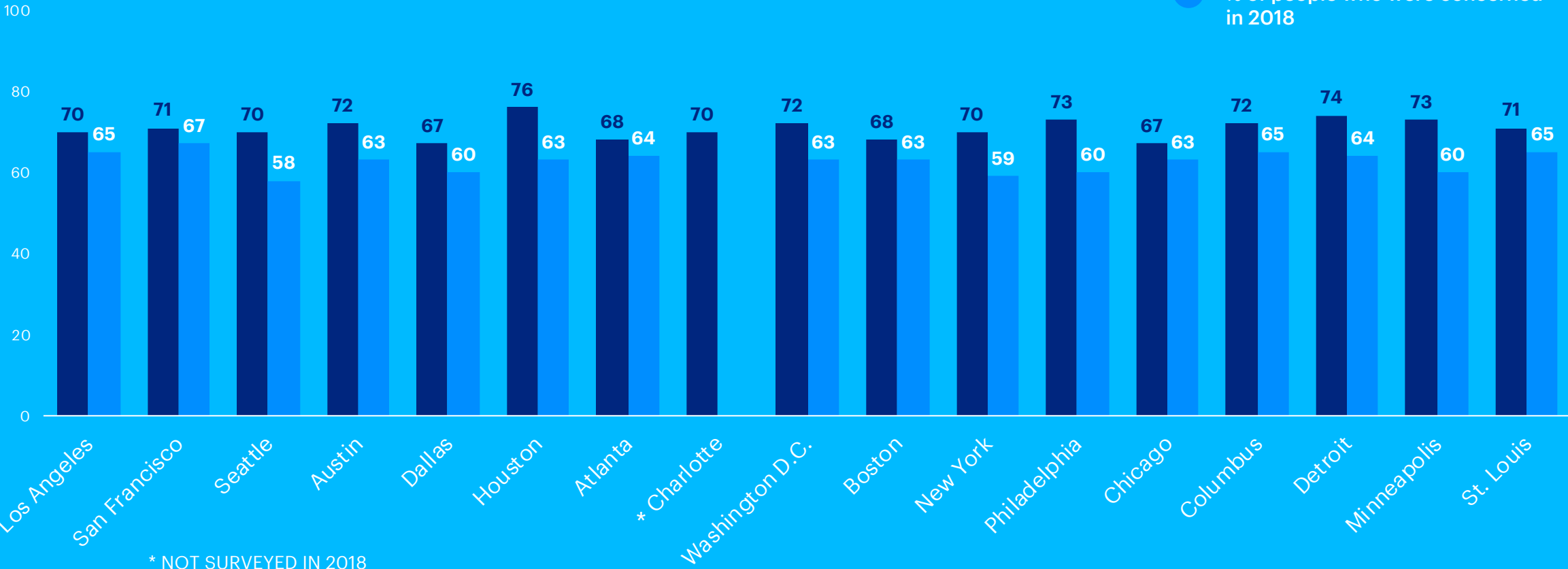
# SHOPPERS ARE CONCERNED AND ARE TAKING STEPS TO COMBAT "PORCH PIRATES" THIS HOLIDAY SEASON.



# HEIGHTENED CONCERN OVER THE SECURITY OF SHOPPERS' PERSONAL INFORMATION.

Q: Are you concerned about the **security of your personal information** when making online purchases this holiday season?

- % of people who are concerned this holiday season (2019)
- % of people who were concerned in 2018



\* NOT SURVEYED IN 2018

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