



2015-2016

CHRISTMAS TRENDS

CONSUMER VIEWS OF CHRISTMAS
LIGHTS, TREES & DECORATING



EXECUTIVE SUMMARY

Christmas Lights, Etc surveyed over 2,500 consumers across the United States to gain insight on Christmas lighting and decorating trends specifically based on their personal preferences. ChristmasLightsEtc.com is the most shopped online Christmas light store in America based on national Alexa rankings and this survey is one of the largest of its kind on how consumers buy and use holiday lighting, Christmas trees and Christmas decor.

There is certainly value in holiday trend insights from professional decorators and industry experts who spot new trends and share their predictions. However, the intent of this market research is aimed at identifying consumers who are active holiday decorators and to gain insight from them on their likes, perceptions and buying choices when it comes to decorating for the holidays.

The findings are eye opening. People who actively display Christmas lights, trees and décor are more diverse than some of the common stereotypes portray. Many are also far from being single-holiday enthusiasts. For example, 37% of Christmas lighting and decorating consumers also decorate for Halloween. Nearly 20% also decorate for July 4th.

The findings were also surprising related to preferences between men and women. We saw for the first time that while both men and women prefer LED Christmas lighting, men prefer LEDs significantly more than women. While the debate over LED vs. incandescent can vary widely, we now know that it can vary widely simply between genders.

Christmas Lights, Etc is grateful to share these survey highlights because many Christmas-oriented businesses share a common passion for the holiday season and will benefit from these findings. We've been fortunate to have served over 500,000 customers. We learn from these customers every day and we think everyone will find value in what they have to say. Consumers showcase their holiday decorating creativity in a wide variety of ways. They love options and the ability to express their individualism as they share the joy and wonder that only holiday displays can evoke.

Companies that bring Christmas lighting, trees and decor products to market all play a part in fostering this amazing creativity. We hope the opinions from over 2,500 Christmas lights and decor consumers gives you insight for your own planning on customer preferences and trends.

Survey Methodology

Christmas Lights, Etc issued an electronic survey with 2,562 people responding. These people represent every region of the United States. Respondents ranged from ages 20 to 70+ and include consumers who previously purchased decorative lights, trees or décor.



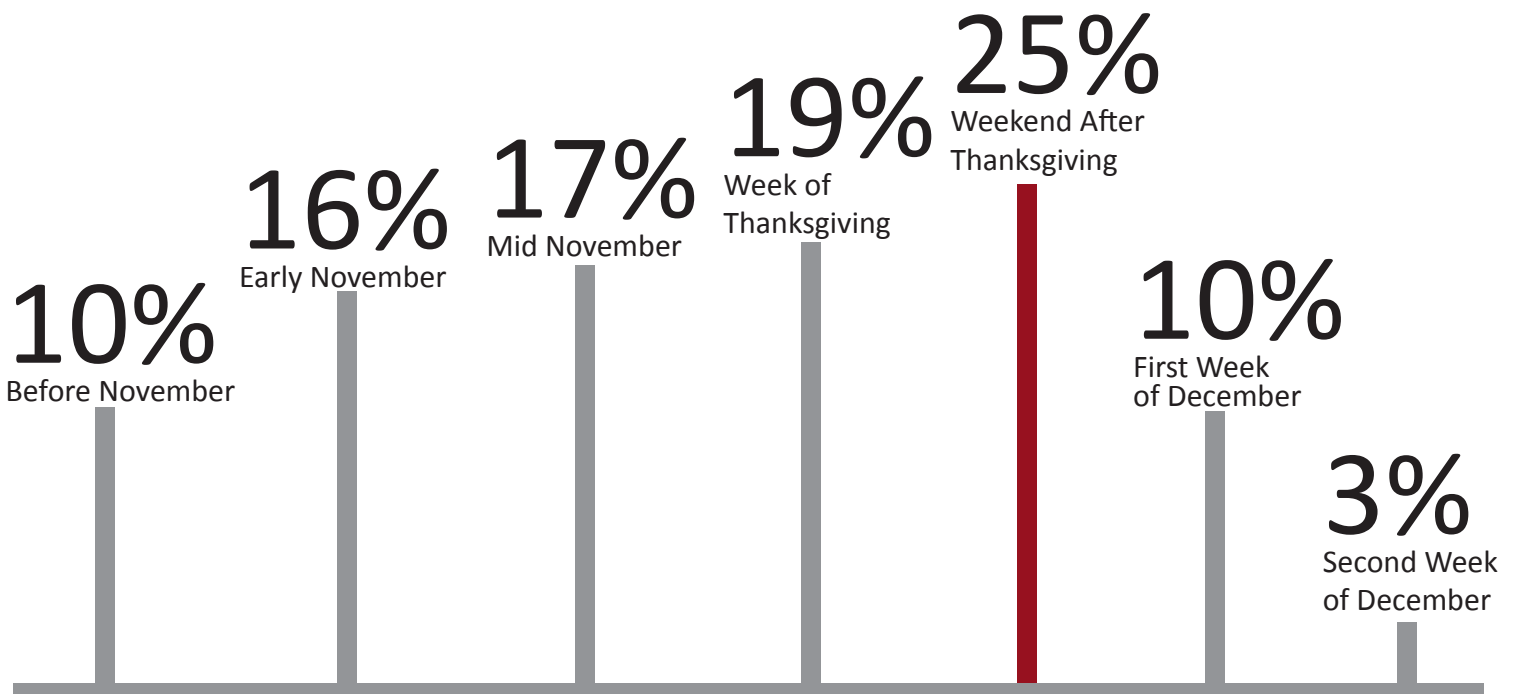
What time of year do you typically begin decorating for Christmas?

Timing matters. When it comes to decorating for the holidays people get started at very different times. While we may know broadly when most people begin, what we learned from consumers is a very detailed pattern of when and how many begin the process at different points in the season.

10% of Christmas consumers actually begin their decorating process prior to November, which may represent the early extreme planners. In general however, 43% of consumers begin their lighting and decorating process prior to Thanksgiving week. The remaining bulk of Christmas consumers (54%) start their decorating process the week of Thanksgiving through the first week of December. While the holiday season may be condensed into a six to eight week time frame, the following benchmarks shed light on just how many people begin early compared to those who wait until early December.

KEY FINDING

The largest grouping of Christmas consumers actually begin their decorating process on Black Friday weekend, which reinforces that they are likely to want their lighting and decor items in hand prior to Black Friday weekend. This is a critical timing consideration for any retailer that sells Christmas decor.





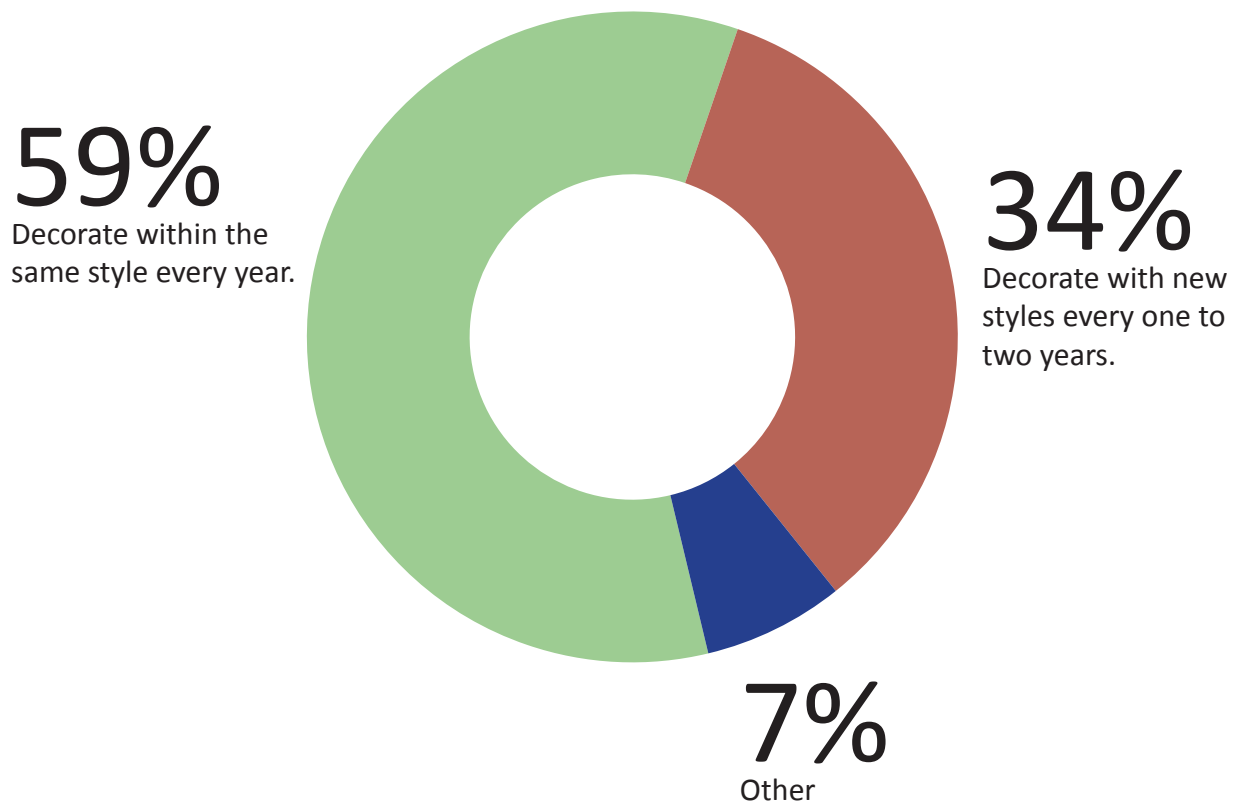
How often do you change your Christmas decorating style?

Over a third (34%) of Christmas decorating consumers say they decorate with new design themes every year or two. They actively create new looks and styles. This group represents the consumer trend setters who constantly explore new creative techniques.

59% have a preferred style and they decorate within that same style every year. While they may buy new Christmas lights and décor every season, these purchases are made to support the pre-existing look and feel they prefer.

KEY FINDING

Within these groups, 15% say they also like to create custom light and décor displays from scratch. This reinforces the growing number of Christmas DIY'ers who increasingly create custom displays in addition to decorating with traditional pre-made décor.





What are your favorite colors for Christmas decorating?

Color is important and it's not all red and green. It may surprise many people that white is the most selected option, but white/clear Christmas lights and white-themed decor are popular choices. White is also the most selected single-color decorating theme for those creating a look that features different shades of white. Red, green, blue and gold round out the top five most chosen colors. While silver comes in sixth, it's notable that all colors after silver appeal to less than a quarter of consumers.

The most popular multi-color combinations are:

1. Red, White, Blue and Green
2. Red, White, Green
3. Red and White
4. Red, White, Silver, Gold and Green
5. Red, White, Silver, Gold, Blue and Green

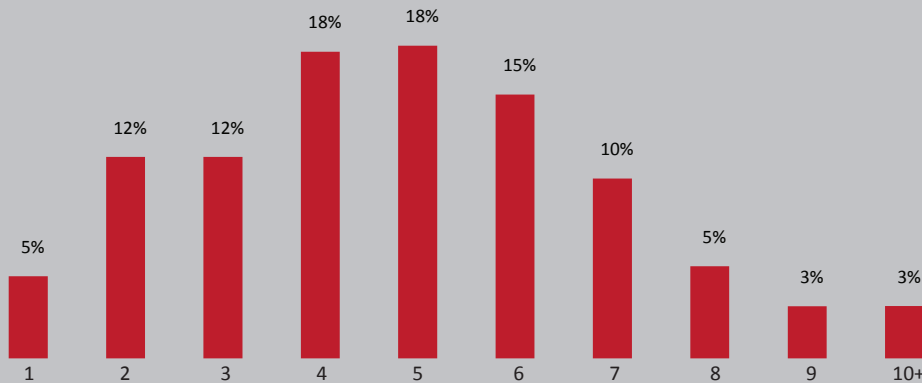
Gender and Color

Certain colors like red and white are consistently chosen by men and women. However, the consistencies stop there. 41% of women selected silver to only 18% of men. Women also selected gold 43% of the time where men only selected it 28% of the time. Conversely, men selected colors like blue and green more frequently than women. This may indicate that women and men prefer different accent colors depending on their creative goals.

Number of Color Combinations

5% of consumers prefer single color design themes, however the vast majority of people (74%) prefer decorating with two to six colors during the holidays.

Percentage of Consumers that Prefer a Certain Number of Colors



Each column represents the number of colors people decorate with. E.g. 5% of consumers decorate with a single color theme. 12% of consumers decorate with a two-color theme, etc.

78%

77%

69%

53%

35%

28%

18%

18%

9%

9%



What Christmas decorating styles have you created in the last three years?

Top 5

1. Traditional Conservative
2. My Own Style
3. Whimsical / Fun
4. Traditional Ornate
5. Modern Simple

There are certain style categories that emerge that are often influenced by historical culture or home décor trends. Within the Christmas community, the terms may be different but the application is similar and what we found is that Christmas consumers are very diverse in their theme choices.

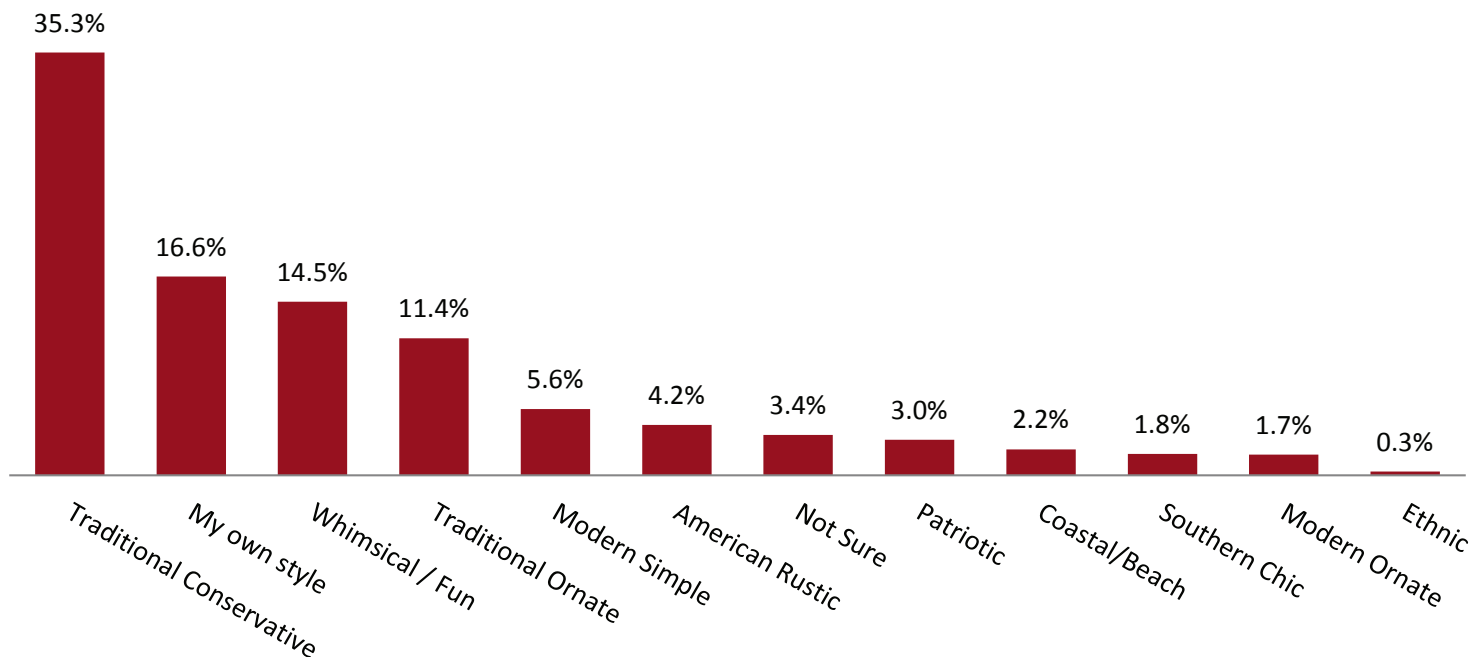
Just over a third of all responses chosen (35%) was the decorating style of “Traditional Conservative.” A roomful of experts may each define these terms differently, so what makes responses like this so valuable is that they capture how consumers self-identify with their own decorating style.

16.6% claim “My Own Style” with 14.5% of responses being the style of “Whimsical/Fun”. “Traditional Ornate” was selected 11.4% of the time followed by the “Modern Simple” style at 5.6%.

A review of consumer comments also revealed styles identified as: religious, Disney, vintage, Southwestern, tropical, steampunk, Victorian and Tuscan, among many others.

Key Finding

More than half of all style options selected (53%) were choices other than Traditional Conservative or Traditional Ornate. This indicates that while traditional is still the largest category, there are more people that self identify their style as something other than traditional, which reinforces the growing number of Christmas consumers that actively explore new creative ways to go beyond traditional lighting and decor.





How many Christmas trees did you display in your home last holiday season?

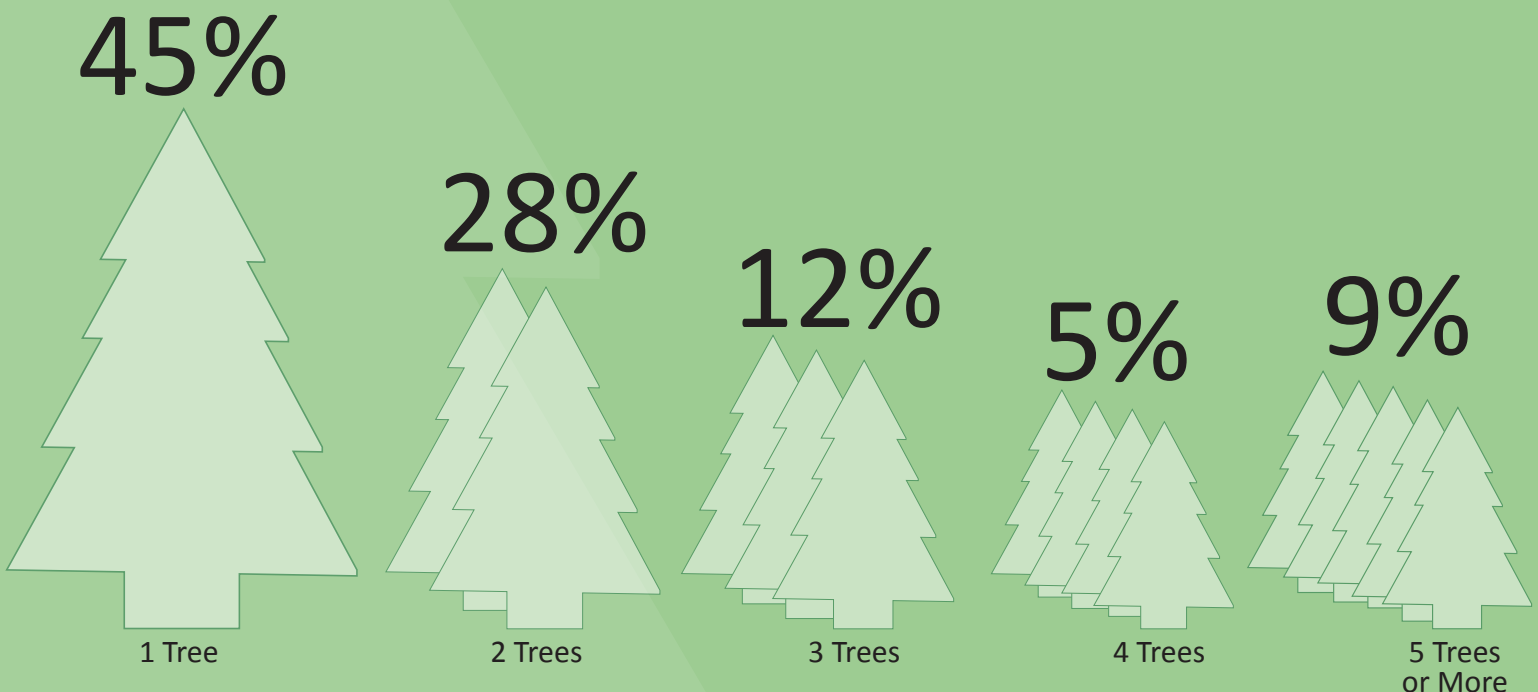
A Christmas tree is often the focal point of holiday decorating within the home, but that does not mean there can be only one. More than 53% of survey respondents indicated they display two or more trees in their home during the holidays.

Smaller decorative Christmas trees are popular as accent decor items but in many cases the additional Christmas trees on display may be full size. It is not uncommon for Christmas enthusiasts to display full size trees in their entryways or foyer common areas. It is also popular to display additional trees in family rooms, living rooms, studies and children's bedrooms, space permitting.

Over a quarter (28%) of Christmas consumers display two trees in their home every year. Those displaying three trees account for 12% of respondents and 5% say they display four trees within their home.

Key Finding

Nearly half of all Christmas consumers (45%) still only display one Christmas tree in their home. However, because more than half display two or more trees, it's an indicator that the majority of Christmas consumers actually prefer using multiple trees in their overall holiday decorative plan.



Note: 3% of respondents do not decorate with trees.



Which areas of your home do you decorate with lights or decor?

Different areas of a home often require different types of Christmas lights and decor and some enthusiasts may invest more outside or inside their homes depending on their overall display preferences. Interestingly, the Living Room was slightly edged out by the Porch for the most selected area that Christmas consumers decorate. Porch was selected 69% of the time to the Living Room's 68%.

Trees, bushes and windows round out the top five most decorated areas with each option being selected by more than half of all Christmas consumers. This illustrates that more than half of Christmas consumers use Christmas lights and decor outside the home to share their creativity and festive spirit.

Secondary rooms in a home were also selected by a large number of Christmas enthusiasts beyond just the living room or family room. Dining rooms and kitchens were selected by roughly a third of Christmas consumers.

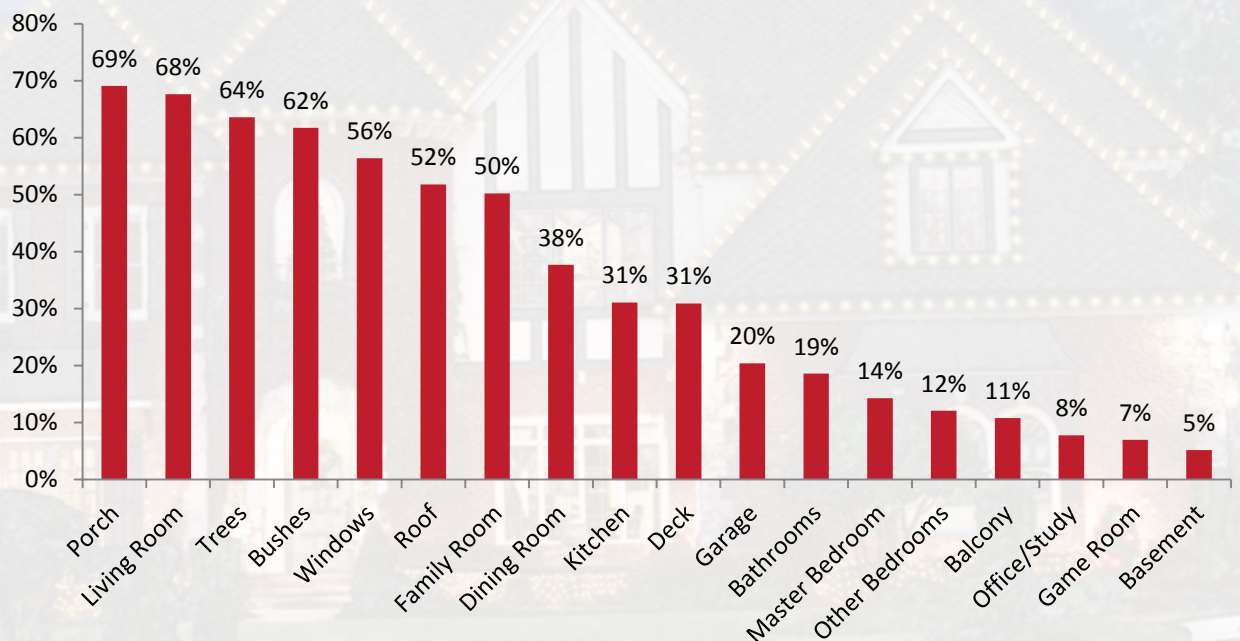
Key Findings

More than half (51%) of Christmas consumers use Christmas lights or decor in 3 to 6 specific areas inside or outside their home.

- 13% use Christmas lights or decor in only 1-2 areas.
- 25% use Christmas lights or decor in 3-4 areas.
- 26% use Christmas lights or decor in 5-6 areas.
- 17% use Christmas lights or decor in 7-8 areas.
- 11% use Christmas lights or decor in 9-10 areas.
- 8% use Christmas lights or decor in 11+ areas.

Top 5

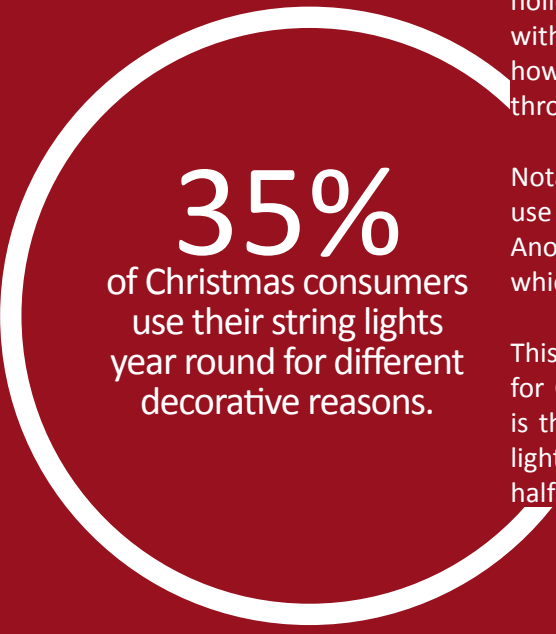
1. Porch
2. Living Room
3. Trees
4. Bushes
5. Windows





Do you use your string lights for outdoor decorative lighting throughout the year?

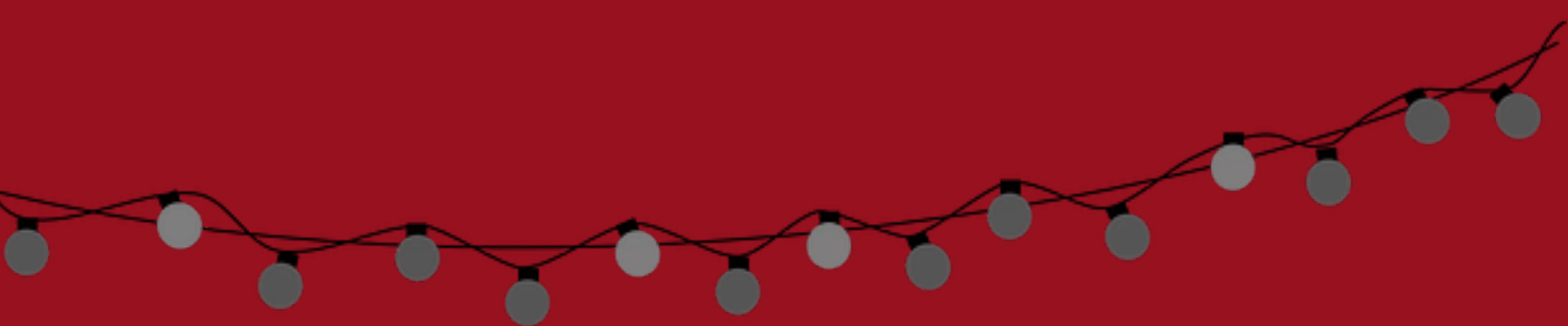
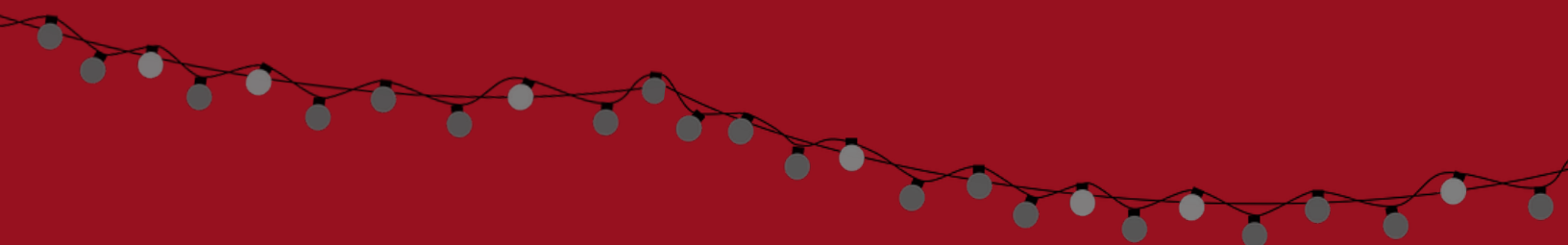
Christmas string lights seem to have a life far beyond the holiday season sometimes and while they may be used with very different intents, it's worthwhile to benchmark how Christmas enthusiasts themselves use string lights throughout the year.



35%
of Christmas consumers use their string lights year round for different decorative reasons.

Notably, over a third of Christmas consumers (35%) actually use their string lights for different reasons year round. Another 24% "use them as needed" throughout the year, which is largely limited to special occasions or parties.

This leaves 41% who only use their Christmas string lights for Christmas. What's interesting about these benchmarks is that they indicate that certain types of Christmas string lights actually transcend the holiday season for more than half of all Christmas consumers surveyed.





Do you prefer LED or Incandescent lights? Or do you have No Preference?

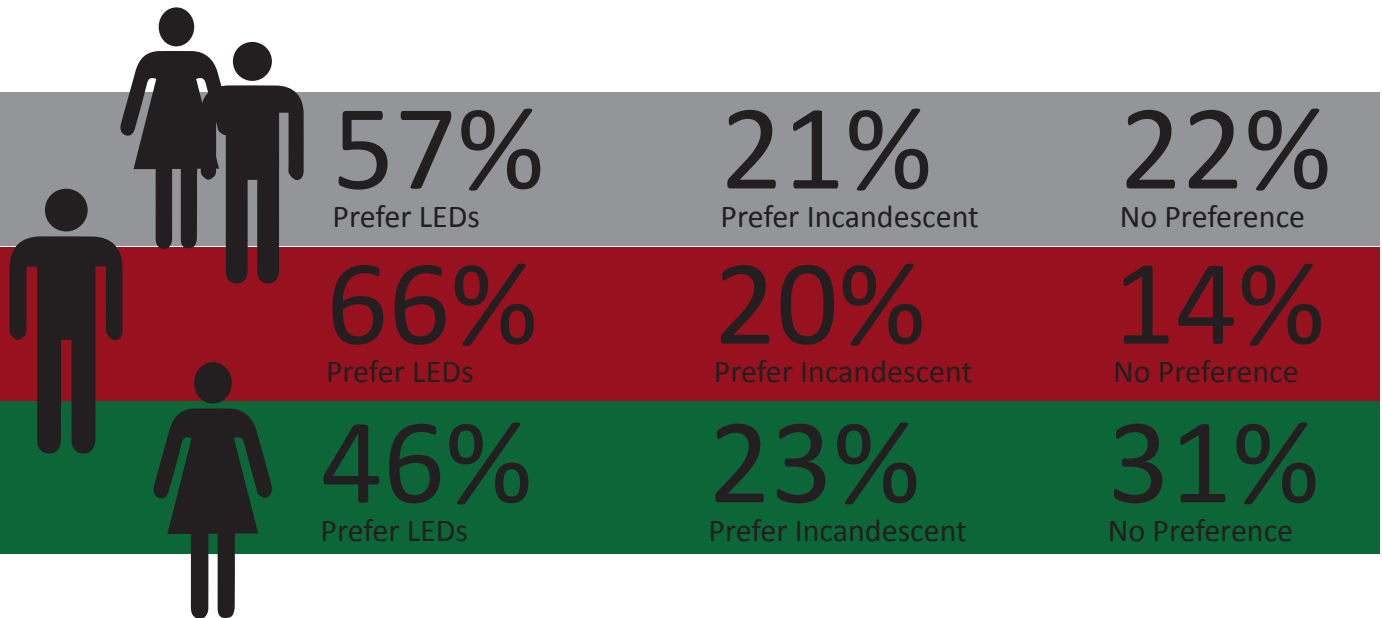
57% of Christmas consumers prefer LED lights. 21% prefer incandescent lights. 22% have no preference.

Let those benchmarks sink in for a moment as you consider the debate over LED vs. incandescent lighting. There are staunch defenders and detractors in each camp and for many Christmas enthusiasts it's simply a matter of preference. However, it's abundantly clear that Christmas consumers now overwhelmingly prefer LED Christmas lights.

One fifth of consumers still prefer incandescent lights and while some may think there is a right or wrong side to this debate, it is simply a matter of preference.

KEY FINDING

66% of men prefer LEDs — an overwhelming majority. However, only 46% of women prefer LEDs and 31% of women actually have no preference. This implies that the LED vs. incandescent debate is more gender specific than once realized. This could speak to natural preferences in outdoor lighting where men may play a larger role during the holidays, or it could highlight that LED Christmas lights have simply not captured as much of the attention of women like they have for men. A major transition in decorative lighting has taken place over the last decade and it's notable that it has not been more equally embraced between men and women.





Top Christmas Movies by Age and Gender

Every Christmas survey needs some extra fun sprinkled in and Christmas Lights, Etc was curious about what Christmas movies were people's favorites. We've all seen the expert critic top ten lists to gauge these answers but we wanted more insight. Not everyone likes the same movies and we were curious how they compared by gender and age between those in their 30s to those over 60. The results are fascinating.

For example, men over 60 choose *Miracle on 34th Street* as the best Christmas movie of all time. Women under 40, choose *The Grinch that Stole Christmas* cartoon. Diversity of preference is clearly alive and well and movie preferences say a lot about the various Christmas subcultures that exist.





Create Something Wonderful!

Christmas Lights, Etc thanks you for taking the time to learn about consumer trends in Christmas lights, trees and decor. If you have any questions, please feel free to contact us.

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