PUBLIC POLL FINDINGS AND METHODOLOGY

Over two in five Americans are planning to use holiday cards to connect with loved ones this holiday season

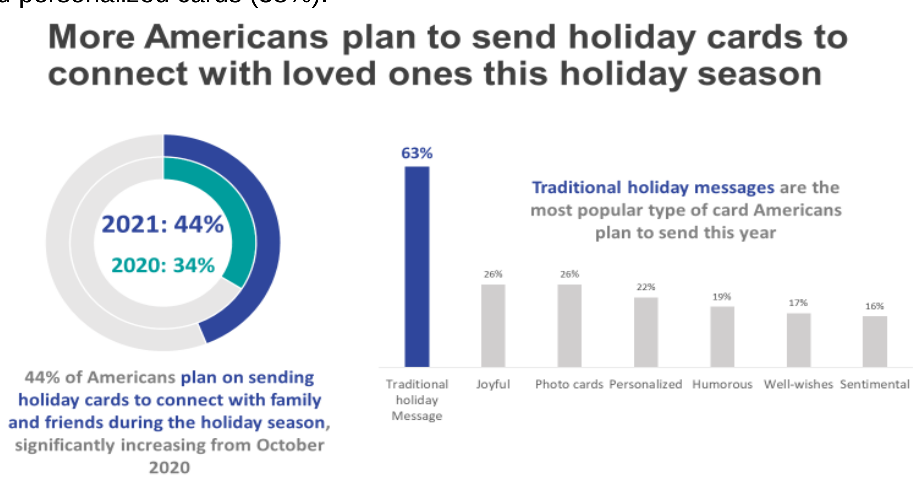
A new Ipsos poll on behalf of Shutterfly finds that a majority of Americans are interested in receiving traditional holiday cards

Topline Findings

Washington, DC, September 21, 2021- A new Shutterfly poll, conducted by Ipsos, finds that two in five Americans plan on sending out holiday cards or give personalized mementos and gifts to connect with family and friends this holiday season, a significant increase from this time last year. More this year also indicate plans to give personalized gifts and mementos to family and friends. Among those who have purchased personalized gifts in the past, the most popular reason was to show family or friends that they care or because they think a personalized present carries more meaning than a typical gift. Americans' predictions of their post-pandemic shopping habits have changed from October 2020, with the number of people saying they will shop online more post-pandemic decreasing significantly.

Detailed Findings

1. Compared to last year, more Americans now report plans to send out holiday cards or give personalized gifts this holiday season.
    - Two in five Americans plan on sending out holiday cards or give personalized mementos and gifts to connect with family and friends this holiday season (44% for both), both increasing significantly from October 2020 (34% and 21%, respectively).
    - Women are more likely to send out holiday cards (47%) and give personalized gifts and mementos (49%) than men (42% and 39%, respectively).
    - Among those planning to send out cards this year, traditional holiday messages are by far the most popular type (63%). Younger age groups show more interest in other card types such as photo cards (38% for 18-34 year olds vs. 34% for 35-54 year olds and 6% of 55-70 year olds) and personalized cards (37% of 18-34 year olds vs. 16% of 35-54 year olds and 19% of 55-70 year olds).
    - Even though the majority plan to send traditional messages, interest in receiving other types of holiday cards is high. While just over half still say they would like to receive a traditional card (51%), roughly two in five are interested in humorous cards (44%), photo cards (41%), and personalized cards (38%).



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GAME CHANGERS

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2. The most common type of gift Americans plan to purchase this year is a gift card (57%), followed by traditional holiday gifts (43%), money (34%) and a personalized or customized gift (33%).
    - Since March 2021, there has been no significant change in reported purchases of personalized gifts (22% March 2021, 23% September 2021), or of photos and custom prints (23% March 2021, 20% September 2021).
    - Among those who have purchased personalized gifts, the most popular reason was to show family or friends that they care by giving customized gifts (52%), or because they think a personalized present carries more meaning than a typical gift (44%).
    - The largest shares of Americans plan to start their holiday shopping between early fall through October (15%), end of November (Black Friday) to early December (17%), or have already started (16%).
    - When it comes to how Americans are shopping for gifts, over half say they are more likely to shop online than in person (58%) and are planning to spend the same amount on holiday gifts this year as they did last holiday season (67%).

3. Americans' predictions of their post-pandemic shopping habits have changed slightly from last year. More now anticipate their habits not changing.
    - Currently, 53% expect that their post-pandemic shopping habits will remain the same, up from 43% last year. At the same time, fewer anticipate shopping online more post-pandemic (32% in September 2021, 41% in October 2020).
    - Notably, a majority say it is extremely or very likely that they will shop online for the holiday season, perhaps underscoring why fewer anticipate habits to change in the future.
    - When shopping online, free shipping (64%) is the number one aspect people expect during their shopping experience, followed by competitive pricing (56%).

These are the findings of an Ipsos poll conducted between September 13-15, 2021. For this survey, a sample of 1,005 adults ages 18 to 70 from the continental U.S., Alaska, and Hawaii was interviewed online in English. The poll has a credibility interval of plus or minus 3.5 percentage points for all respondents.

For full results, please refer to the following annotated questionnaire:

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Full Annotated Questionnaire

1. In which of the following ways, if any, do you plan on connecting with family and friends during the holiday season? (Please select all that apply).

	Total September 2021 (N=1,005)	*Total October 2020 (N=1,005)*
Eating or drinking special foods/drinks	70%	*44%*
Decorating the house	49%	*35%*
Sending out holiday cards to stay in touch with family/friends	44%	*34%*
Giving personalized mementos and gifts to family and friends	44%	*21%*
Receiving special gifts or mementos from loved ones	42%	*25%*
Playing games	35%	*22%*
Singing and dancing	17%	*9%*
None of the above	11%	*19%*

2. **[Asked if Q1 = "Sending out holiday cards"]** Which type(s) of greeting cards do you plan on sending this year for the holidays? Which type(s) of cards did you send last year for the holidays? Please select all that apply for each timeframe.

    a. Cards I plan to send this year for the holidays

	Total September 2021 (N=445)	*Total October 2020 (N=88)**
Traditional holiday message (Merry Christmas, Happy Holidays, etc.)	63%	*71%*
Joyful	26%	*20%*
Photo cards	26%	*N/A*
Personalized	22%	*N/A*
Humorous	19%	*14%*
Well-wishes	17%	*11%*
Sentimental	16%	*9%*
None of the above	1%	*4%*

**October 2020 respondents were asked Q2 only if "Sending holiday cards to loved ones" was selected in a preceding single select question: "Which of the following will you be engaging in most during this holiday season? (Please select one response)." This question is different from the 2021 preceding question, and 9% of October 2020 respondents selected "Sending holiday cards to loved ones"*

b. Cards I sent last year for the holidays

	Total September 2021 (N=445)	*Total October 2020 (N=88)**
Traditional holiday message (Merry Christmas, Happy Holidays, etc.)	61%	*67%*
Photo cards	21%	*N/A*
Joyful	21%	*16%*
Personalized	19%	*N/A*
Well-wishes	17%	*7%*
Humorous	14%	*14%*
Sentimental	11%	*9%*
None of the above	10%	*8%*

**October 2020 respondents were asked Q2 only if "Sending holiday cards to loved ones" was selected in a preceding single select question: "Which of the following will you be engaging in most during this holiday season? (Please select one response)." This question is different from the 2021 preceding question, and 9% of October 2020 respondents selected "Sending holiday cards to loved ones"*

3. Which of these types of cards would you like to receive? (Check all that apply).

	Total
Traditional holiday message (Merry Christmas, Happy Holidays, etc.)	51%
Humorous	44%
Photo cards	41%
Personalized	38%
Joyful	35%
Well-wishes	27%
Sentimental	25%
None of the above	12%

4. Which of these, if any, do you plan on purchasing/gifting during the holiday season? (Check all that apply).

	Total
Gift Card	57%
Traditional holiday gift (i.e. holiday themed ornaments, candles, etc.)	43%
Money	34%
Personalized and/or customized gift (i.e. a gift customized with photos, names, monograms, custom text, and designs of your choosing)	33%
I plan to make a gift for the recipient instead	9%
None of the above	16%

5. **[Asked if Q4 = "I plan to make a gift for the recipient"]** You mentioned you plan to create your gift, which of the following best represents how you plan to make it? (Select one response).

	Total (N=110)
Crafting (i.e. handmade)	35%
Designing (i.e. creating a customized or personalized item)	29%
Baking a treat or special food item	22%
Sewing (i.e. knitting and/or crocheting)	7%
None of the Above	7%

6. Which of the following best represents when you plan on shopping for the holiday season?

	Total
I have already started	16%
During Fall through October	15%
Beginning of November to Middle of November	12%
Middle of November to End of November	9%
End of November (Black Friday) to Early December	17%
Early December to Middle of December	7%
Middle of December to End of December	4%
Beginning of the new year	*
I'm always shopping for holiday gifts	4%
I'm a last minute shopper	5%
I do not shop for gifts	9%

7. When holiday shopping, how likely are you to shop online vs. in-person?

	Total
Extremely likely	29%
Very likely	29%
Somewhat likely	26%
Slightly likely	8%
Not at all likely	8%
Likely (Net)	*58%*
Not likely (Net)	*16%*

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8. How much do you plan to spend on holiday shopping this year?

	Total
0-$50	8%
$51-$100	7%
$101-$150	5%
$151-$200	6%
$201-$250	8%
$251-$300	9%
$301-$350	8%
$351-$400	3%
$401-$450	4%
$451-$500	11%
$501-$1000	20%
Greater than $1000	10%
0-$150 (Net)	*20%*
$151-$300 (Net)	*23%*
$301-$500 (Net)	*27%*
$501+ (Net)	*30%*

9. Do you plan to spend more, less, or the same this year on holiday shopping?

	Total
I plan to spend more than last year	16%
I plan to spend the same amount as last year	67%
I plan to spend less than last year	17%

10. How likely are you to purchase new holiday home decor this year, if at all?

	Total
Extremely likely to purchase	10%
Very likely to purchase	15%
Somewhat likely to purchase	26%
Slightly likely to purchase	17%
Not at all likely to purchase	33%
Likely (Net)	*25%*
Not likely (Net)	*49%*

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11. How will your holidays differ this year from last year? (Check all that apply).

	Total
In-person gatherings	36%
More holiday parties to attend	15%
Bigger celebrations	14%
Gifts will be more sentimental	13%
No virtual celebrations	12%
Spend more money on gifts	12%
More customized and/or personalized gifts	12%
Writing more personalized cards	10%
First time sending holiday cards	4%
None of the above	38%

12. Thinking of your shopping habits post-pandemic, do you believe you will be shopping online more or less once the pandemic is over? (Please select one response).

	Total September 2021	***Total October 2020 (N=848)***
I will be shopping online more post-pandemic	32%	*41%*
I will be shopping online less because I prefer shopping in-store	15%	*15%*
No change in current shopping habits	53%	*43%*

13. When shopping online, which of the following do you expect of your experience? (Please select all that apply).

	Total September 2021	***Total October 2020***
Free shipping	64%	*N/A*
Competitive pricing	56%	*N/A*
Product is available	55%	*N/A*
Easy to use	55%	*N/A*
Website is safe and secure	55%	*70%*
Fast shipping times	54%	*N/A*
Personal Information is secure on site	44%	*N/A*
Clear product images and descriptions	42%	*56%*
Check-out process is effortless	40%	*55%*
Includes product reviews	37%	*45%*
Various payment options	32%	*N/A*
Easy to use on mobile	31%	*33%*
Customer service is available 24/7	28%	*25%*
Personalized service and products	12%	*N/A*
Remembers my preferences from previous shopping trips	12%	*21%*
None of the above	9%	*10%*

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14. Which of the following, if any, have you purchased in the past year? Please select all that apply.

	Total September 2021	*Total March 2021 (N=1,000)*
Personalized/Customized Gifts (e.g., personalized apparel, accessories, jewelry which are customized with photos and names of your choosing, home items which are customized with photos and sayings such as mugs, frames, socks, pillows, bags, etc.)	23%	*22%*
Photos/Custom Prints (e.g., printed photos, banners, signs)	20%	*23%*
Printed Cards/Invites (e.g., store-bought greeting card, custom-printed holiday cards which may include photos on them, invitations, announcements, thank you cards, wedding invites, save the dates)	18%	*16%*
Printed Personalized Photo Holiday Cards (e.g. physical card with a picture of the family or friends or pets to send out to others during the holiday season)	10%	*14%*
Custom Wall Art (e.g., personalized artwork, custom canvas prints with designs, personalized photo wall art, etc.)	11%	*12%*
Digital Cards/Invites (e.g., digital cards/invitations created, sent, and received online)	10%	*10%*
Photo Calendars (e.g., custom calendars with names, quotes, or photos printed on them)	7%	*10%*
None of the above	49%	*48%*

15. **[Asked if Q14 = Photos/Custom Prints]** You mentioned you have been ordering photos/custom prints. Which of the following is the main reason you have purchased photos/custom prints in the past year?

	Total (N=193)
I want to decorate, frame, and hang up photos/prints around the house and/or office to remind myself of people I cannot see this year because of COVID-19	38%
I plan to share the photos with others as a family or life update	30%
I have more time to organize and develop my prints	14%
None of the Above	17%

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16. **[Asked if Q14 = Personalized/Custom gifts]** Which of the following are reasons why you purchase customized and/or personalized gifts? Select all that apply.

	Total September 2021 (N=198)	***Total March 2021 (N=223)***
To show a family or friend that I care by giving a customized gift to those I am close to	52%	*49%*
I think personalized gifts mean more than a typical gift	44%	*45%*
A personalized gift can be given to anyone to make them feel special	42%	*39%*
To last for a lifetime as a keepsake	38%	*37%*
To connect and give a gift to family and friends that I have not seen in a while	27%	*31%*
To remember an important event or time in my life	38%	*25%*
To remember or commemorate a special person in my life who I am no longer able to see	21%	*23%*
To create and customize something for a special friend in need	28%	*20%*
To treat myself with a fun and new item that is personalized to my tastes	22%	*19%*
Other reason(s)	2%	*1%*

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17. Which of these companies/brands, if any, have you purchased from in the past 12 months including your purchases during the Pandemic? (Please select all that apply).

	Total September 2021	*Total March 2021*
Target	32%	*7%*
Etsy	16%	*17%*
Hobby Lobby	14%	*16%*
Walgreens Photo	14%	*12%*
Shutterfly	15%	*10%*
Walmart Photo Center	12%	*13%*
CVS Photos	12%	*9%*
JoAnn Fabrics	7%	*11%*
Google Photos	8%	*10%*
Amazon Photos (not just Amazon.com)	7%	*10%*
Vistaprint	6%	*6%*
Snapfish	4%	*4%*
Lifetouch	3%	*4%*
Papyrus	3%	*3%*
Zazzle	2%	*3%*
Evite	2%	*1%*
CafePress	1%	*2%*
Minted	1%	*2%*
Mixbook	1%	*2%*
Simply to Impress	2%	*1%*
Tiny Prints	1%	*1%*
Artifact Uprising	*	*1%*
Other	3%	*2%*
None of the Above	32%	*43%*

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18. Thinking about your overall lifestyle, please indicate how much you personally agree or disagree with each of the statements listed below:

Total Agree Summary

	Total
My friends ask me for advice on the latest trends and styles	45%
I'm the first one to try new home decorating trends	39%

a. I'm the first one to try new home decorating trends

	Total
Agree Completely	7%
Agree Strongly	11%
Agree Somewhat	21%
Disagree Somewhat	23%
Disagree Strongly	16%
Disagree Completely	22%
Agree (Net)	*39%*
Disagree (Net)	*61%*

b. My friends ask me for advice on the latest trends and styles

	Total
Agree Completely	7%
Agree Strongly	12%
Agree Somewhat	26%
Disagree Somewhat	20%
Disagree Strongly	12%
Disagree Completely	22%
Agree (Net)	*45%*
Disagree (Net)	*55%*

19. For each of the following pairs of attributes, please indicate whether you agree more with option A or B, and to what degree.

Total Agree Summary

	Total
Option B: Quality is usually my most important criteria when buying an item	52%
Option A: Price is usually my most important criteria when buying an item	48%

a. **[Agree with option A]** Price is usually my most important criteria when buying an item

	Total
Strongly Agree	11%
Mostly Agree	17%
Slightly Agree	20%
Agree (Net)	*48%*

b. **[Agree with option B]** Quality is usually my most important criteria when buying an item

	Total
Strongly Agree	10%
Mostly Agree	21%
Slightly Agree	21%
Agree (Net)	*52%*

20. For each of the following pairs of attributes, please indicate whether you agree more with option A or B, and to what degree.

Total Agree Summary

	Total
Option A: I prefer to purchase from familiar brands	62%
Option B: I like to try new brands	38%

a. **[Agree with option A]** I prefer to purchase from familiar brands

	Total
Strongly Agree	9%
Mostly Agree	25%
Slightly Agree	28%
Agree (Net)	*62%*

b. **[Agree with option B]** I like to try new brands

	Total
Strongly Agree	6%
Mostly Agree	13%
Slightly Agree	19%
Agree (Net)	*38%*

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About the Study

These are the findings of an Ipsos poll conducted on behalf of Shutterfly between September 13-15, 2021. For this survey, a sample of 1,005 adults ages 18 to 70 from the continental U.S., Alaska, and Hawaii was interviewed online in English. This poll is trended against previous Shutterfly polls, also conducted by Ipsos, between October 8-9, 2020, with a sample of 1,005 U.S. adults, and March 18-23, 2021, with a sample of 1,000 U.S. adults.

The sample was randomly drawn from Ipsos' online panel, partner online panel sources, and "river" sampling and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a sample. After a sample has been obtained from the Ipsos panel, Ipsos calibrates respondent characteristics to be representative of the U.S. Population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2018 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics. Posthoc weights were made to the population characteristics on gender, age, race/ethnicity, region, and education.

Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 3.5 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=1,005, DEFF=1.5, adjusted Confidence Interval=+/-5.0 percentage points).

The polls fielded from October 8-9, 2020 and March 18-23, 2021, have a credibility interval of plus or minus 3.5 percentage points.

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About Ipsos

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Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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