

SEASONAL DECORATIONS MARKET EXECUTIVE SUMMARY

Topline Summary of Survey among Seasonal Decorations Consumers

Table of Contents

Introduction.....	2
Total Market for Decorations \$14.1 Billion	3
• Decorations Spending by Holiday in millions	3
Majority of Respondents are actively involved in Holiday Decorating Chores.....	4
• Level of Involvement in Holiday Decorating.....	4
Top Three Decorating Holidays: Christmas, Halloween and Thanksgiving.....	5
• Home Decorating Holidays.....	5
Where They Decorate for Each Holiday.....	6
• Where Decorated	6
Christmas and Party Celebrations Stimulate Most Decorations Sales	7
• Holiday and Event Decorating Purchases	7
Decorators Buy Both Inside & Outside Decorations for Christmas and Halloween, but They Buy Indoor Mostly for Events/Parties.....	8
• Purchased New Decorations	8
Types of Indoor Decorations Purchased	9
• Type of Indoor Decorations Purchased.....	9
Type of Outdoor Decorations Purchased	10
• Type of Outdoor Decorations Purchased.....	10
Themes for Halloween Decorations	11
• Halloween Decorations Purchased	11
Indoor Decorations Purchased for Christmas	12
• Christmas Indoor Decorations Purchased for Christmas 2003.....	12
Outdoor Decorations Purchased for Christmas	13
• New Outdoor Decorations Purchased for Christmas 2003	13
How your Outdoor Christmas Display Compares with Neighborhood	14
• How Outdoor Christmas Display Compares with Neighbors	14
How Much Typical Household Spends on Decorations	15
• Typical Households Decorations Spending, Median	15
Where Decorators Buy Their Decorations.....	16
• Where People Regularly or Occasionally Buy Their Decorations.....	16
Hallmark, American Greetings/Carlton Cards and Martha Stewart Everyday, Lenox & Things Remembered are Top Decorating Brands.....	17
• Brand Awareness/Decorations Source.....	17
Younger Consumers More Positive About Spending on New Decorations	18

- Decorations Spending Trends..... 18
- Half of Decorators are Also Decorating Crafters..... 19**
 - Holiday Decorations Crafting 19
- Decorating Attitudes & Motivations 20**
 - Attitudinals..... 20
- Future Vision—Christmas 2004 Likelihood to Buy New Decorations in Coming New Year 21**
 - Likelihood to Buy New Decorations Coming 12 Months..... 21
- Future Vision—Christmas 2004 Prime Shopping Season Starts in October 22**
 - Expect to Begin Buying Christmas/Hannukah Decorations for 2004 Season..... 22
- Future Vision—Christmas 2004 Discounters and Craft and Hobby will Draw Most Shoppers 23**
 - Stores Where Decorators Most Likely to Shop for Christmas 2004..... 23
- Future Vision—Christmas 2004 Most Decorators will Buy Both Inside & Outside Decorations..... 24**
 - Plan to Purchase New Decorations..... 24
- Future Vision—Christmas 2004 Candles, Paper & Party Decorations & Garlands, Roping, Swags and Ribbons Top Indoor Decorations 25**
 - New Indoor Decorations Expect to Purchase for Christmas 2004 25
- Future Vision—Christmas 2004 Lights Top the List for Outdoor Decorations to Purchase 26**
 - New Outdoor Decorations to be Purchased Christmas 2004 26
- Future Vision—Christmas 2004 Traditional Red & Green Top Color Choice 27**
 - Christmas Decoration Colors 27
- Future Vision—Christmas 2004 Decorators Will Spend About \$114 on New Christmas Decorations 28**
 - Expected Spending Christmas Decorations 2004..... 28