

2018 NCTA Consumer Poll Figures and Trends

Nielsen, a global leader in consumer research, conducted the annual Harris Consumer Poll for NCTA January 7–9, 2019 online among 2,020 adults within the United States. The sample was balanced for age, sex, race/ethnicity, education, geographic region and household income to match the actual proportions of the US population. Total projections for U.S. numbers are calculated using the multiplier of 124.59 million households for 2018. This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated.

Here are the highlights of the 2018 season poll.

INITIAL OBSERVATIONS

During 2018, many growers and retailers reported good sales for the season with tight supplies and a clear increase in young families coming to purchase real trees.

THE GOOD NEWS

24% of US households reported purchasing a Real Christmas tree in 2018. (see Figure 1)

THE NOT-SO-GOOD NEWS

Purchases of New Artificial Trees – The number of households that reported purchasing a new artificial tree in 2018 increased to 19% from 17% in 2017, with a total of 58% of US households displaying an artificial tree in 2018 and 20% of households having no Christmas tree at all (totals to more than 100% due to consumers who responded they had both a real and an artificial Christmas tree).

The number of households displaying a real tree continues to differ across the regions of the U.S. 29% of those living in the Northeast displayed a real tree vs. 25% in the West and 24% in the South, with only 17% in the Midwest.

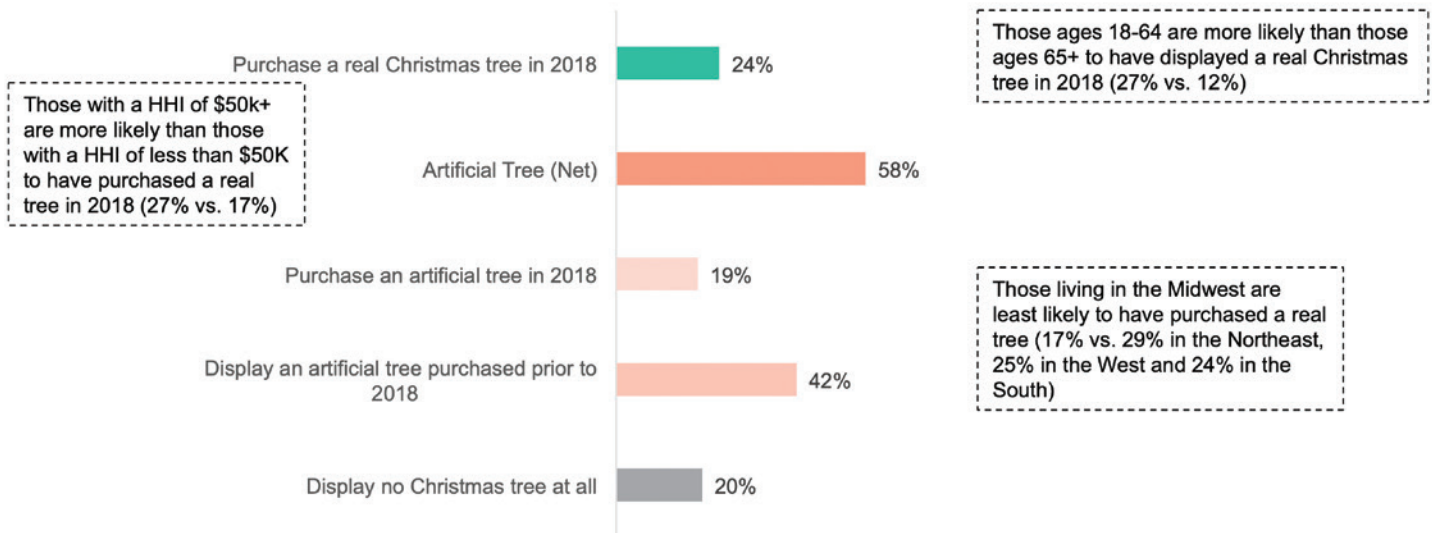
MORE GOOD NEWS

Average Price Paid Per Tree – Those consumers who reported purchasing at least one real Christmas tree in 2018 reported spending an average of \$78 per tree, an increase of only \$3 from 2017. While many things can contribute to what consumers spend on a real tree, there was strong demand and tight supply but the small increase in average price vs. 2017 clearly indicates there wasn't a shortage of trees. (see Figure 2)

Over 1 in 5 Americans purchased a real Christmas tree in 2018

FIG 1

Type of Christmas Tree Purchased/Displayed in 2018



BASE: ALL RESPONDENTS (n=2,020)

Q1 The next few questions are about Christmas trees. Please think of a "real" Christmas tree as a fresh tree grown in the ground that has been recently harvested for the holiday season and an "artificial" Christmas tree as one made out of synthetic material. This past holiday season did you...? Please select all that apply.

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Of those who reported purchasing new artificial trees in 2018, they reported spending an average of \$104, an \$3 decrease in average price from 2017.

OTHER INTERESTING DATA

Purchase Location - There were also some fluctuations in where consumers reported purchasing their Real Christmas Trees. Chain stores had another strong sales year at 28% of real tree volume and specialty lots at 23%. Farms captured a total of 28% of all real tree sales. It's interesting that pre-cut trees purchased at a farm were 18% of all real tree sales while cut-your-own was 11%. This was the fourth year in a row that farms sold more pre-cut than cut-your-own trees. Farms are clearly an important retail category, selling more than 1/4 of all real trees. (see Figure 3)

DISCONCERTING NEWS:

Nearly 60% of US households displayed an artificial Christmas tree in 2018, a significant loss of market share for real trees over the past generation. Winning over young adults as real tree customers and reversing the loss of market share to artificial trees is vital for the industry's future.

The annual Harris Interactive Consumer Poll research is supported by NCTA's Professional Members, plus voluntary contributions to the Real Tree Advocacy Fund and the Tree Industry Partnership (TIP) program. This summary of the survey is provided to the industry, NCTA's Professional Members receive the full detailed report as a benefit of membership. Thank you to all the individuals, businesses and organizations who make this possible. To learn more or pledge your support to these efforts, visit www.realchristmastrees.org or call 800-975-5920. 🌲

On average, consumers spent over \$70 on real trees in 2018

FIG 2



BASE: DISPLAYED AN ARTIFICIAL CHRISTMAS TREE THEY PURCHASED IN 2018 (n=374)

Q2 How much did you pay for your artificial tree purchased in 2018? Please round your answer to the nearest dollar. If you purchased more than 1 artificial Christmas tree in 2018, please think about the primary artificial Christmas tree you purchased.

BASE: PURCHASED A REAL CHRISTMAS TREE IN 2018 (n=463)

Q3 And how much did you pay for your real Christmas tree that you purchased in 2018? Please round your answer to the nearest dollar. If you purchased more than 1 real Christmas tree, please think about the primary real Christmas tree you purchased.

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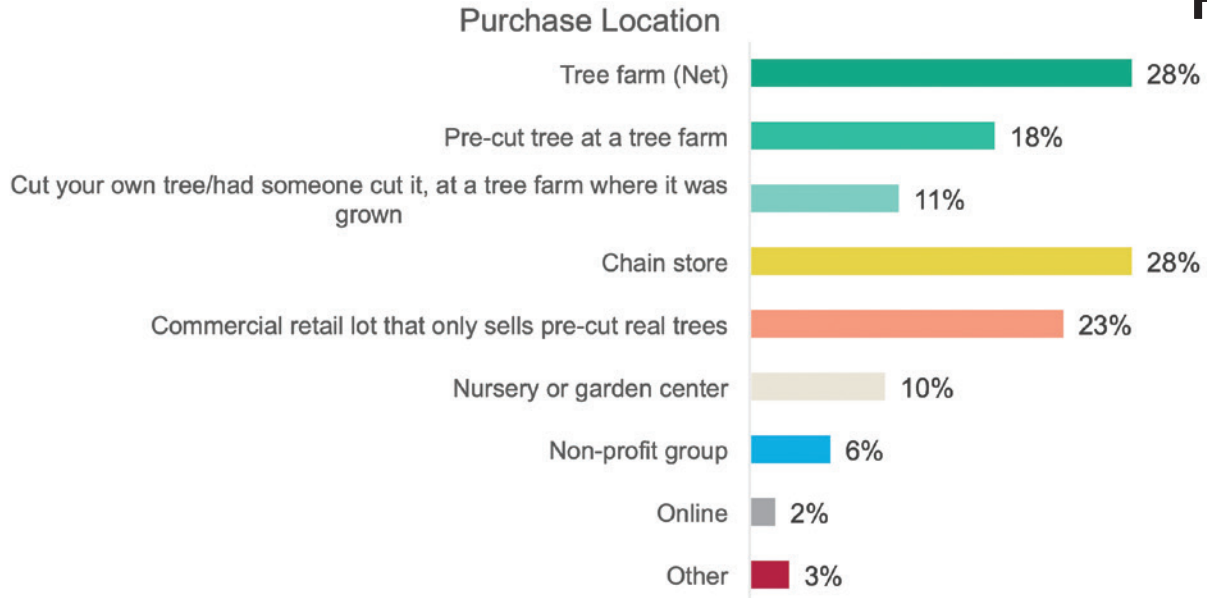
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About three in ten purchased real tree from a tree farm

FIG 3



BASE: PAID \$1+ FOR A REAL CHRISTMAS TREE IN 2018 (n=460)

Q5 Which of the following statements most accurately reflects where you purchased your real Christmas tree this past holiday season? If you purchased more than 1 real Christmas tree for your home, please think about the primary real Christmas tree you purchased.

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POLY-FLEX CHRISTMAS TREE TAGS

Merry Christmas

- ___ Doug Fir
- ___ Noble Fir
- ___ Grand Fir
- ___ Nordmann Fir
- ___ Fraser Fir
- ___ Other

Size \$

Size \$

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