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Accenture Holiday Shopping Survey 2013

October, 2013



Executive Summary

Demographics

Topline Results

Demographics



Executive Summary

The introduction of shopping on Thanksgiving Day is embraced by two out of five shoppers and Black Friday shoppers are on the rise as well

- Nearly one quarter of shoppers (23%) have already started shopping for the holidays and nearly three-quarters will finish by end of November
- Those who shop late in the holiday season (December 15 or later), do so because they are too busy and need time to save up money
- The likelihood of shopping on Black Friday has increased slightly over the years (55% this year vs. 53% in 2012 and 44% in 2011)
- More than one third of shoppers (38%) are likely to shop on Thanksgiving day or night
- Most ONLINE holiday shopping for Thanksgiving and Black Friday is expected to occur after 6pm on Thanksgiving
- In-store shopping will begin around midnight for most and many will shop four or more stores
- For the three out of five who will shop on Thanksgiving Day, the main motive is to take advantage of door buster deals; for those shopping on Black Friday, door buster deals and the best deals of the season are the draw
- Most expect the best discounts to be on Thanksgiving Day, Black Friday or Cyber Monday



Executive Summary

This year, online shopping has claimed an equal share of Thanksgiving and Black Friday holiday shoppers

- Two out of five will spend the majority of their holiday purchases online this year
- Free shipping (68% and online-only discounts (58%) would drive consumers to purchase their holiday gifts online
- Privacy concerns are limiting the number of consumers who will shop using a mobile device (28%)
- The percentage of shoppers shopping online versus in a store on Black Friday is nearly equal; likewise for shopping on Thanksgiving Day
- Most (47%) will use a PC to do their holiday shopping this year
- Most (33%) will shop using a mobile phone or tablets to compare prices while in the store
- Shoppers generally prefer to shop online for the holidays to avoid the crowds (28%); shopping in store is also popular as shoppers like to touch the product before buying (22%)
- For most, approximately three-quarters, the majority of purchases will be in a physical store across all retail categories; most expect to make their purchases across product categories in a physical store as well

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Executive Summary

The integration of the web and store is increasing year over year, albeit slowly

- Showrooming is more likely this year compared to last year (63% vs. 56% in 2012)
- Mobility has a way to go as most of those who find the best deal online will buy that item on their PC at home over using their mobile device (69%)
- “Webrooming” is popular with nearly two-thirds (65%) of holiday shoppers
- The main drivers for webrooming are avoiding shipping fees (47%) and seeing the item before purchasing (46%). Some check online for store availability



Executive Summary

More are spending more this year

- More shoppers will be spending more on their holiday shopping this year compared to last year (82% vs. 77% in 2012); but spending is expected lower compared to prior years
- Most will spend between \$250 and \$500 in total on holiday shopping this year
- Those spending more this year have more discretionary income and will treat themselves. In addition, costs have increased causing consumers to spend more
- Among those spending less, most will cut \$100 or less from their holiday spending compared to last year
- Reasons for those spending less are trying to keep things simple, less discretionary income and increased cost of living
- “Sensible” (58%) and “focused on essentials” (49%) are terms consumers use to describe their spending this holiday season
- Gas prices, cost of food and energy as well as health care are negatively affecting holiday shopping spend
- Most will set a holiday budget at the start of the holidays, and many (46%) are likely to overspend that holiday shopping budget
- Sales will be the primary driver of purchase decisions
- Price matching and online purchasing with store pick-up will be used by most this holiday season



Executive Summary

Cash is kingalong with Major credit cards

- The majority of consumers (52%) plan to pay for their holiday purchases this year using cash saved specifically for holiday shopping; 37% will use major credit cards

The importance of discounts remains high

- Discount retailers will be where the overwhelming majority of consumers will holiday shop this year (76% compared to 73% in 2012).
- More than ever, sales and discounts are important to consumers
- When shopping for the holidays, most will search for and buy discounted items
- For most, 50-75% of all holiday purchases will be discounted
- Discounts as low as 10% are sufficient for most shoppers
- Two out of five respondents (39%) will likely return and repurchase an item if it goes on sale after they buy it



Executive Summary

The percentage of consumers giving gift cards is increasing

- Gift cards (56%), apparel (54%) and to a lesser extent toys (44%), will be on most shopping lists this year
- Gift card giving is on a slight rise compared to last year (68% vs. 67% in 2012)
- Most will spend \$50 or less on a gift card (83%)
- Similar to last year, most gift cards will be for discount retailers (40%) and restaurants (34%); the percentage of consumers giving gift cards has increased (78% vs. 73% in 2012)
- Most will purchase their gift cards at the store where the gift card will be used (57%)
- When spending gift cards, most will treat themselves to something they would not normally buy (39%) and/or purchase something discounted to maximize its value (38%)

Methodology

- Accenture conducted a web survey consisting of more than 50 questions
- There were 500 completed surveys.
- It was a sample panel representative of U.S. population in gender, income and age
- Overall significance at 95% CI; +- 4



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Executive Summary

Topline Results

- **Black Friday Shopping**
- **Online Shopping**
- **Showrooming / Webrooming**
- **Spending Trends and Influencers**
- **Cash and Credit**
- **Discounts**
- **Gift Cards**

Demographics



Executive Summary

Topline Results

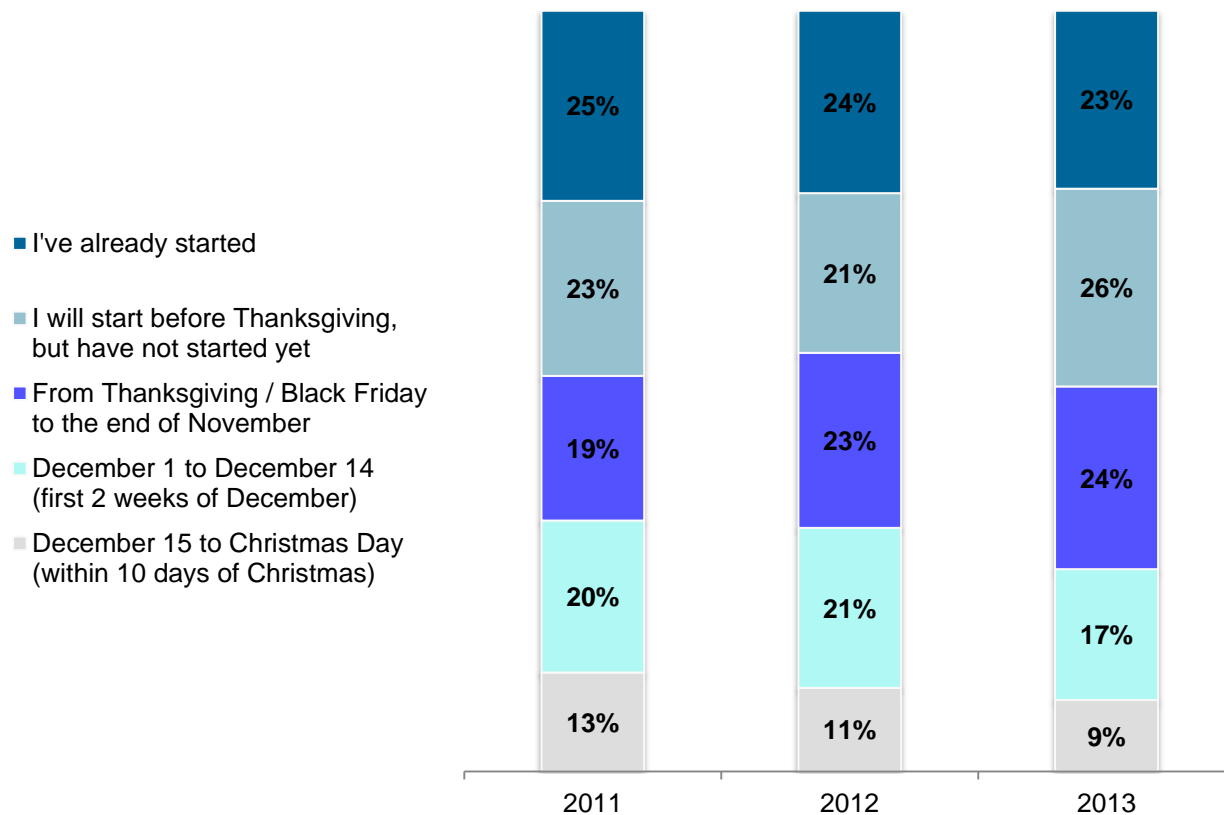
- **Black Friday Shopping**
- **Online Shopping**
- **Showrooming / Webrooming**
- **Spending Trends and Influencers**
- **Cash and Credit**
- **Discounts**
- **Gift Cards**

Demographics



Nearly one quarter have already started shopping and nearly three-quarters will finish by end of November

When do you expect to do the most of your holiday shopping this year?



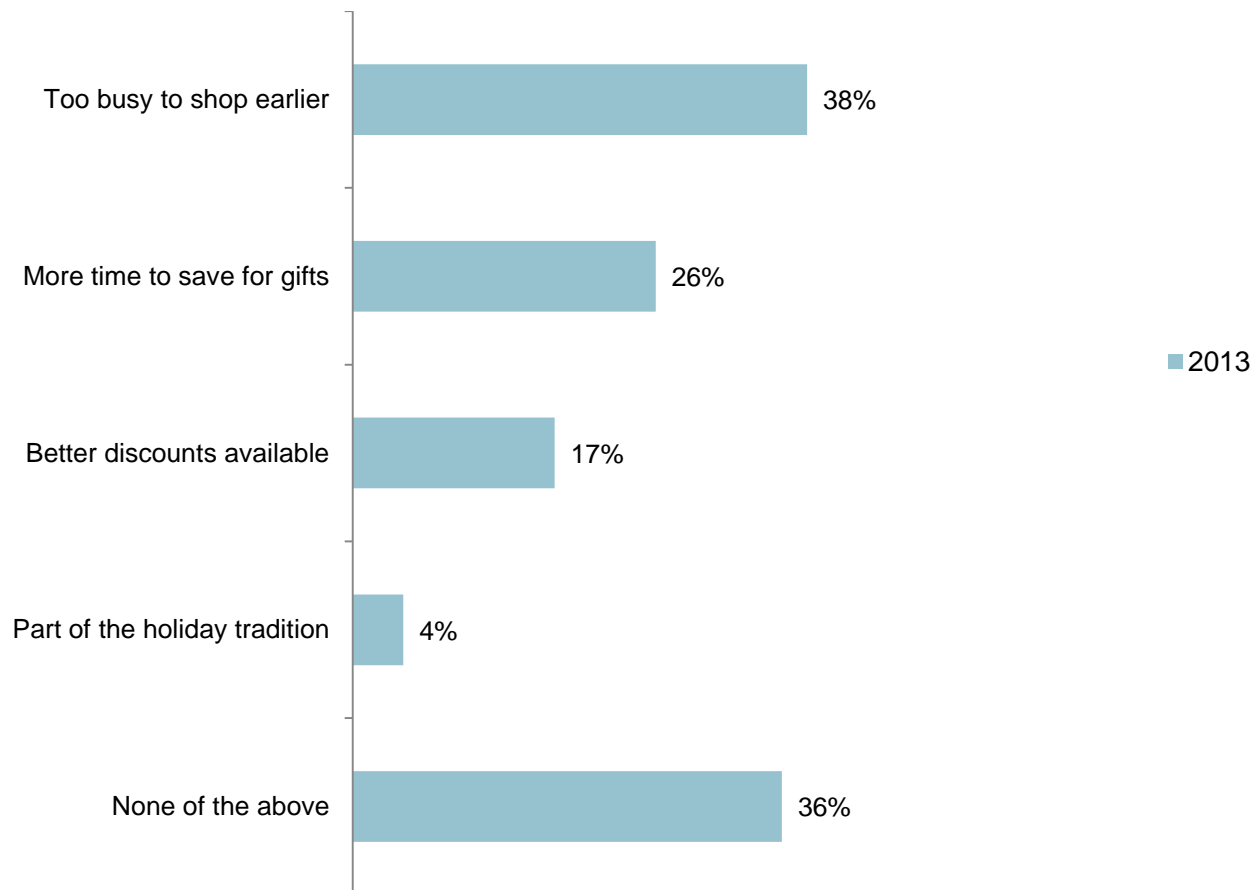
2012

2013



Those who shop late in the holiday season are too busy to shop earlier in the season and need time to save up money

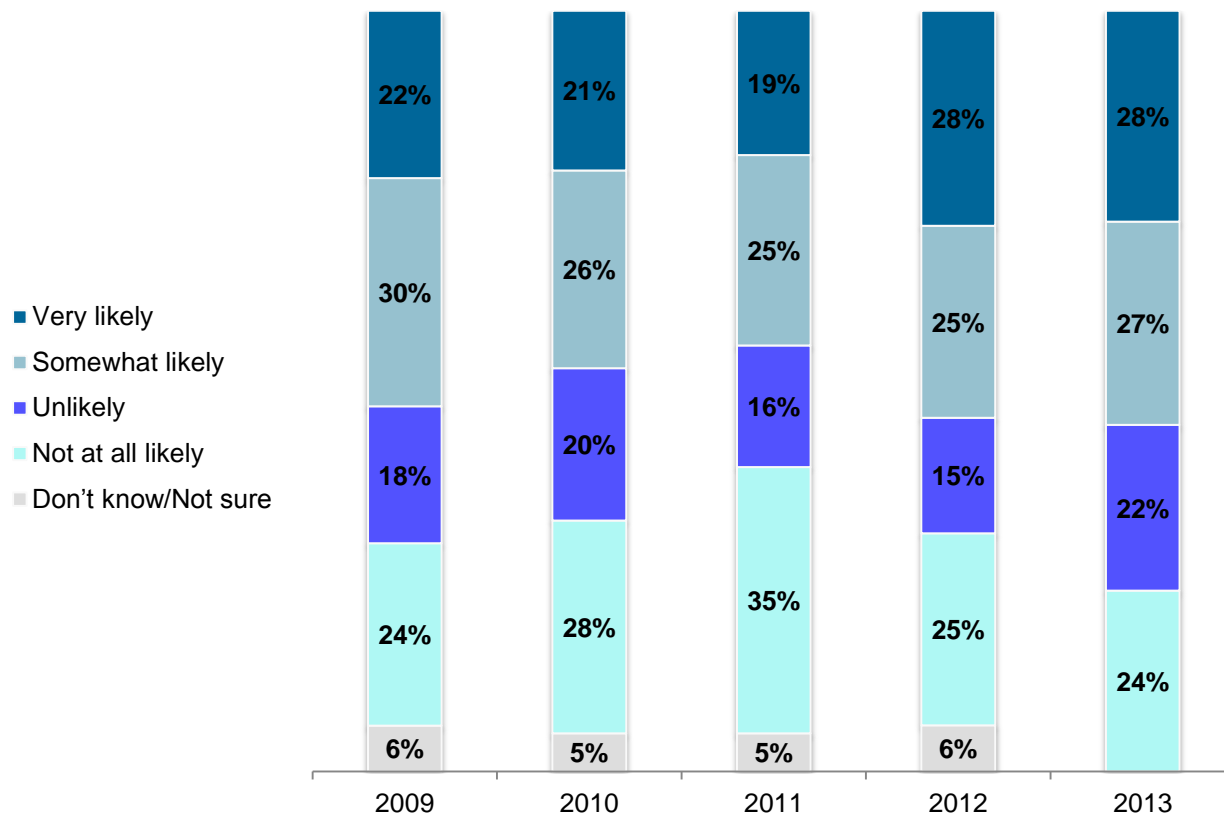
What is your motive for shopping late in the holiday season?
Check all that apply.





The likelihood of shopping on Black Friday has increased slightly over the years

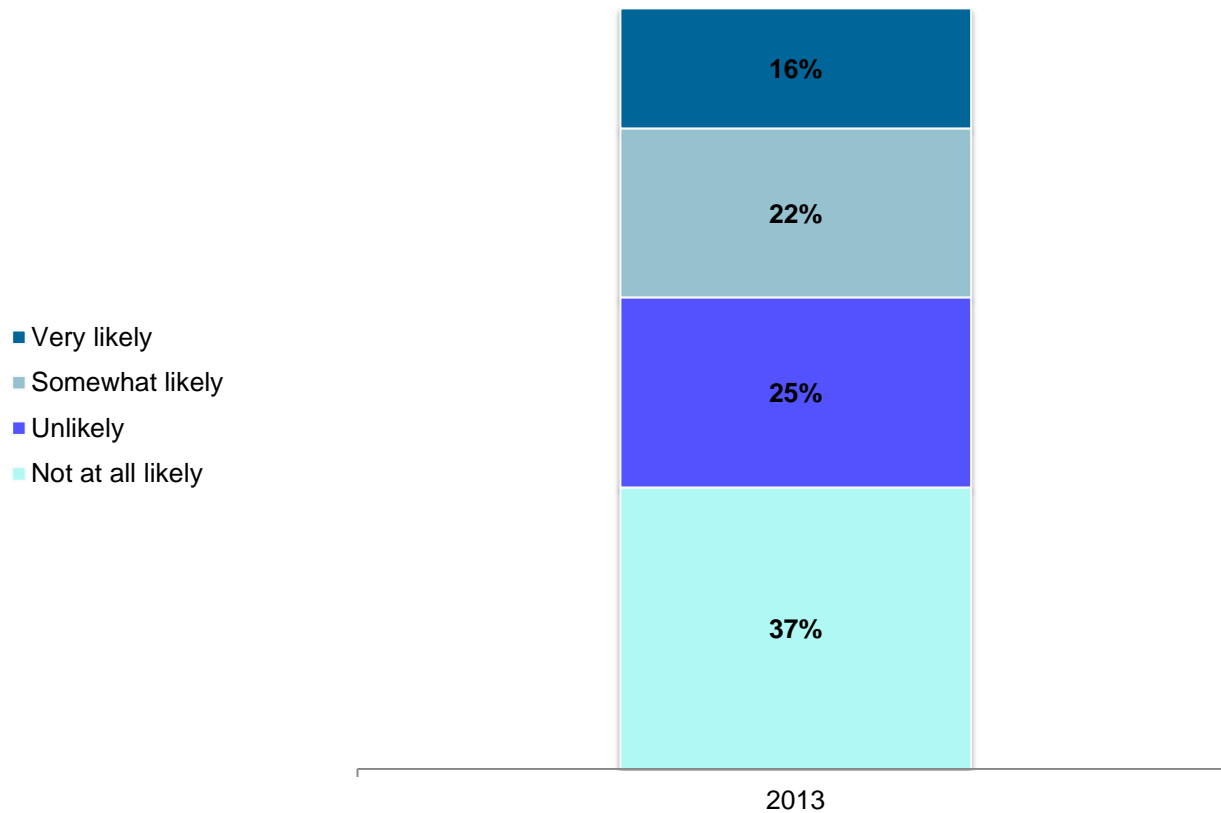
How likely are you to shop on the Friday after Thanksgiving or "Black Friday" this year?



More than one third of shoppers are likely to shop on Thanksgiving day or night



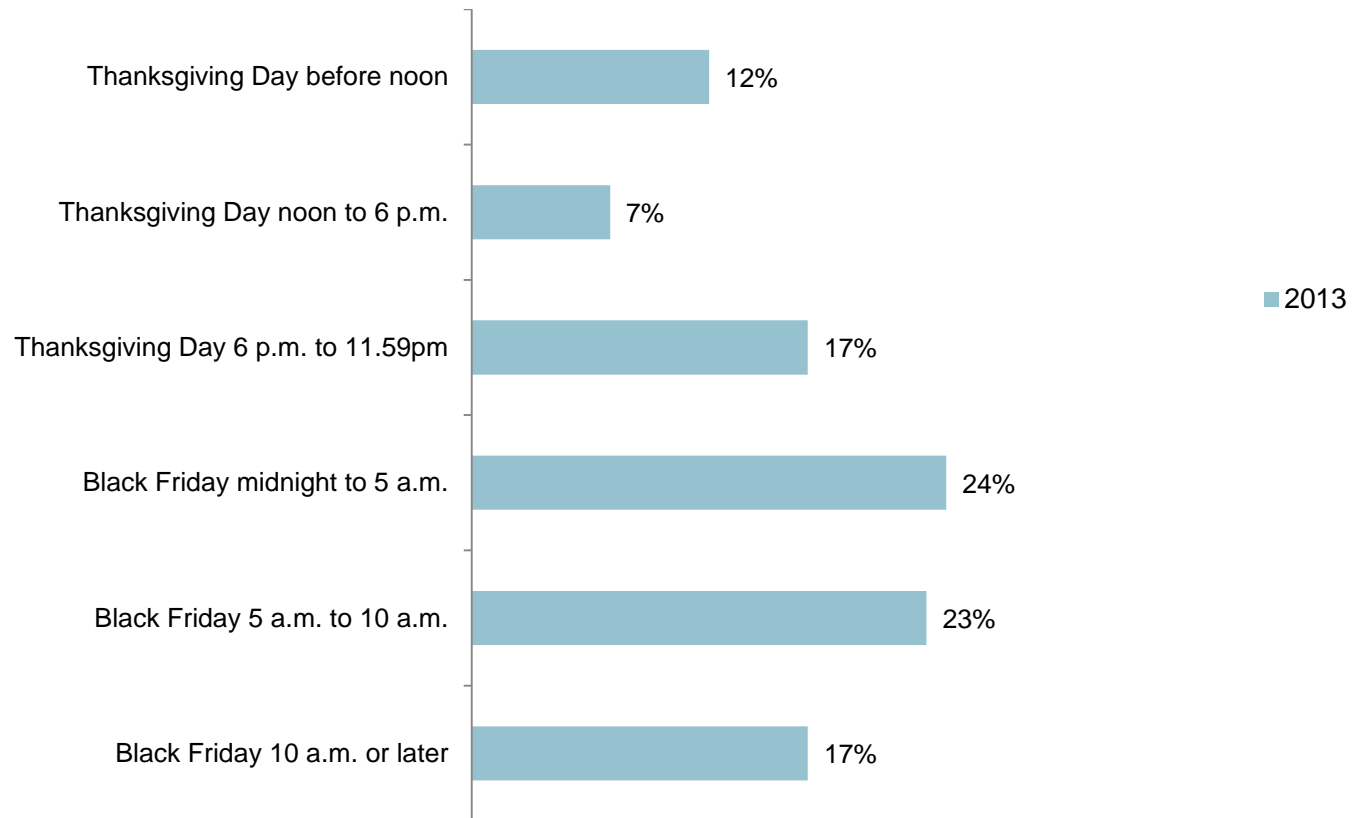
How likely are you to shop on Thanksgiving Day / Night?





The bulk of holiday shopping for Thanksgiving and Black Friday is expected to occur mostly after 6pm on Thanksgiving

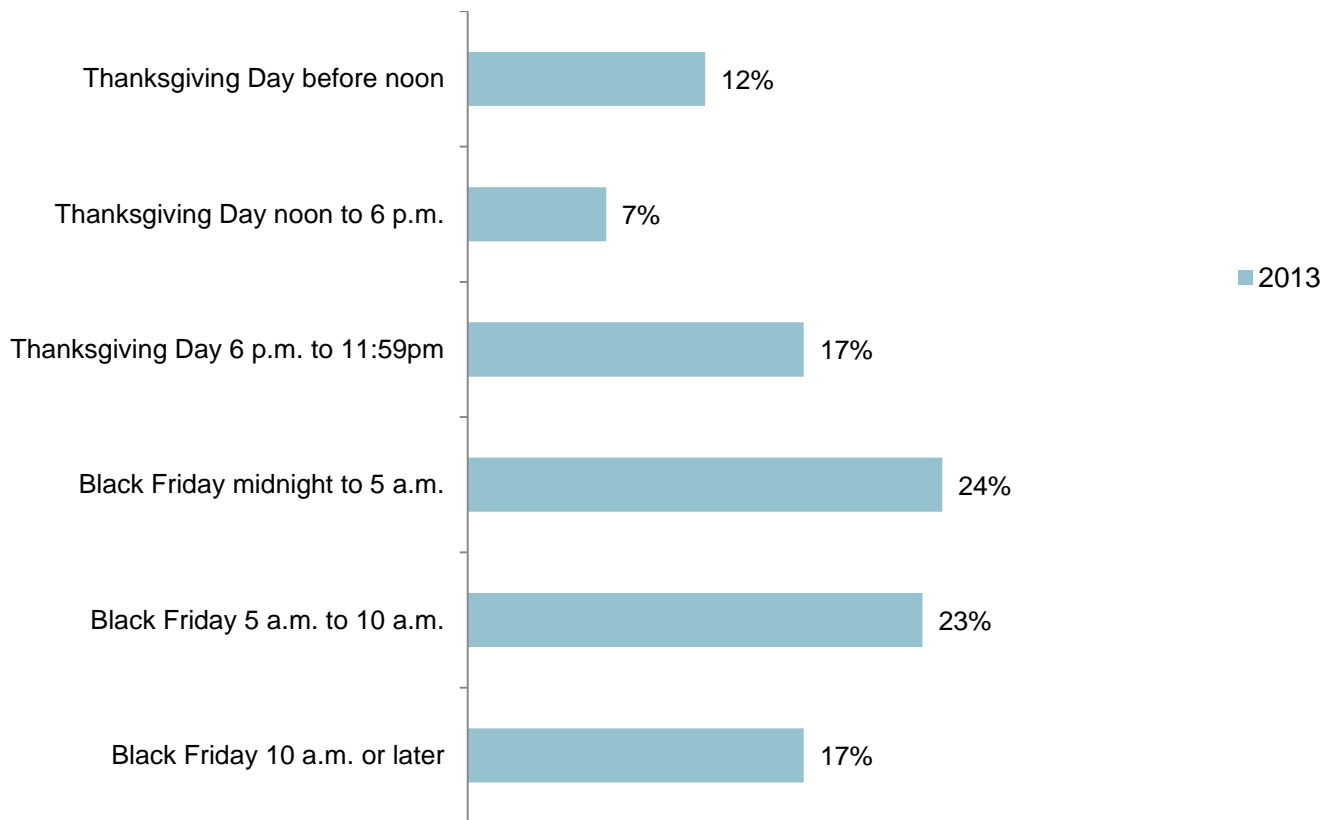
What time do you plan to begin your shopping online on Thanksgiving / Black Friday?





Among those going to a store, shopping will begin around midnight for most...

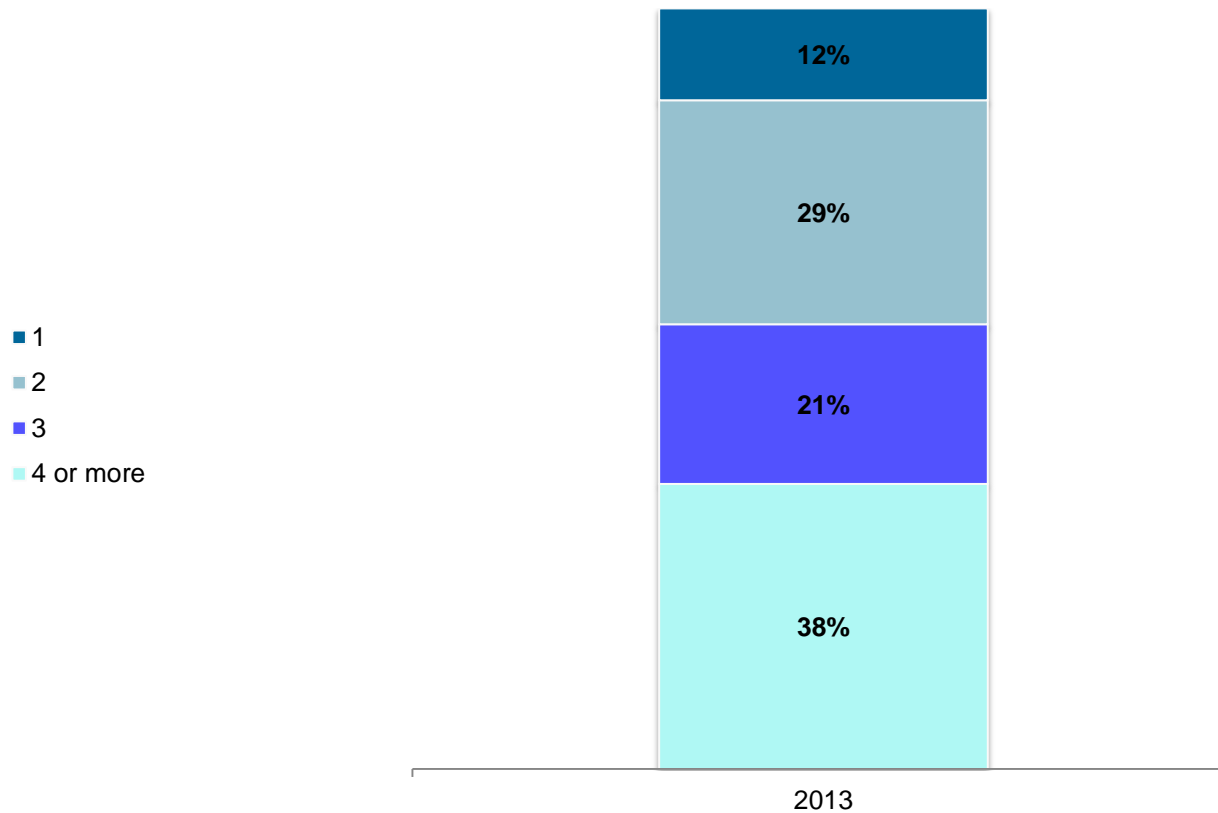
What time do you plan to begin your shopping in a physical store on Thanksgiving / Black Friday?





...and many will shop four or more stores

How many stores do you plan to go to on Thanksgiving and/or Black Friday?

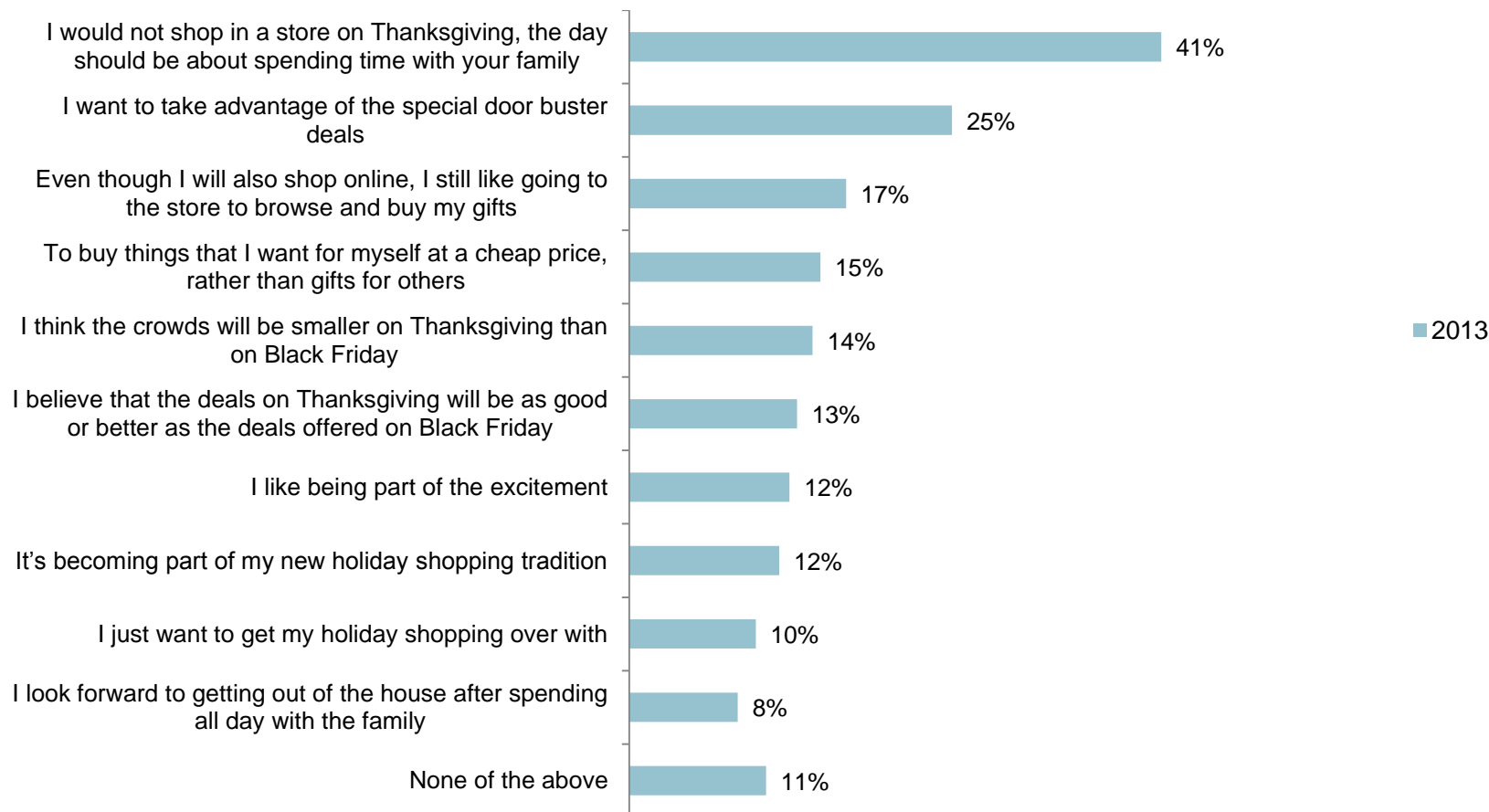




Two out of five consumers will not shop on Thanksgiving day. For those who will, their main motive is to take advantage of door buster deals

Which of the following statements describe why you might or would shop in a store on Thanksgiving Day / Night even if you are not planning to shop?

Check all that apply.

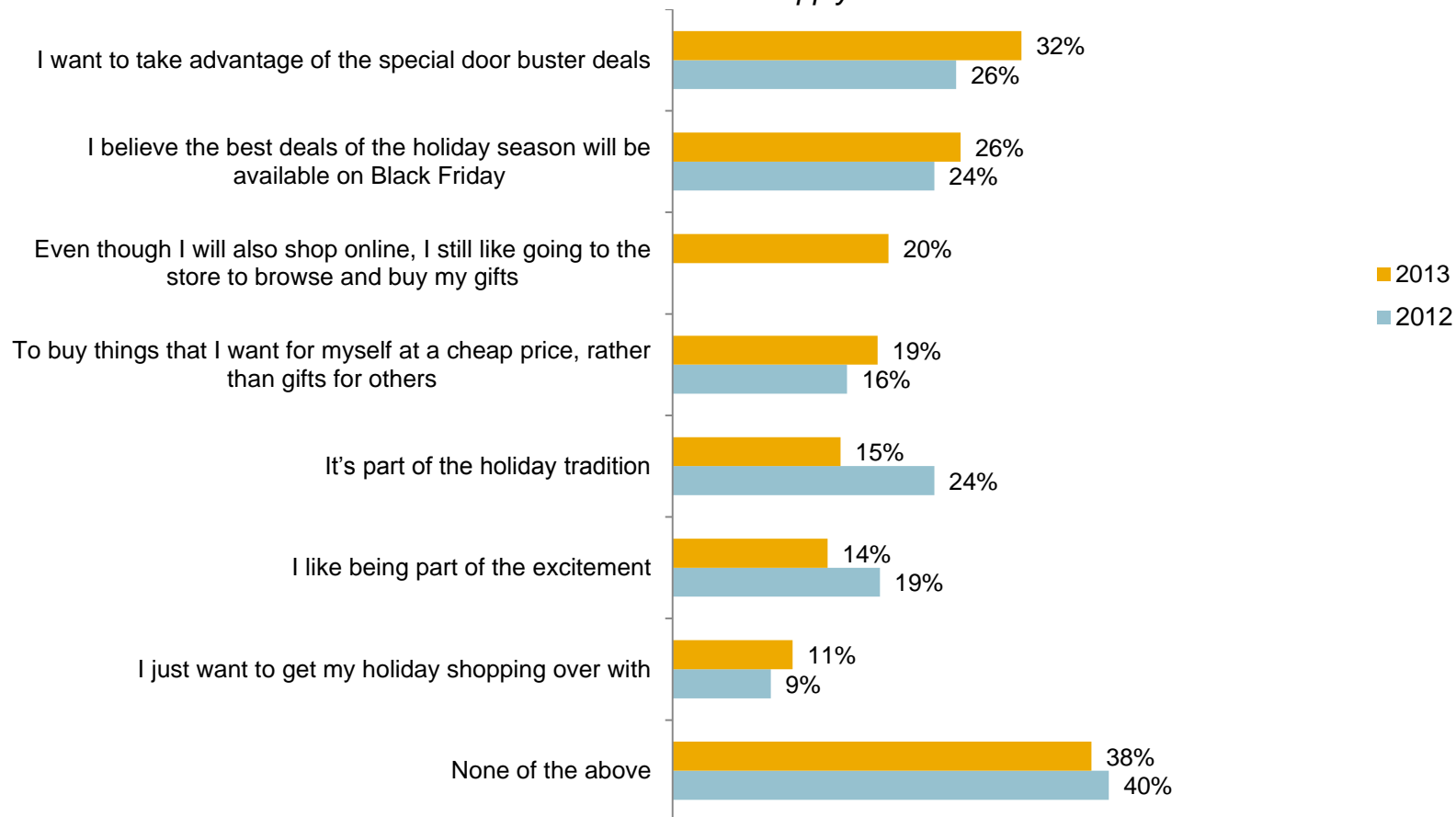


Door buster deals and the best deals of the season are the top reasons consumers will shop on Black Friday



Which of the following statements describe why you would shop in a store on Black Friday?

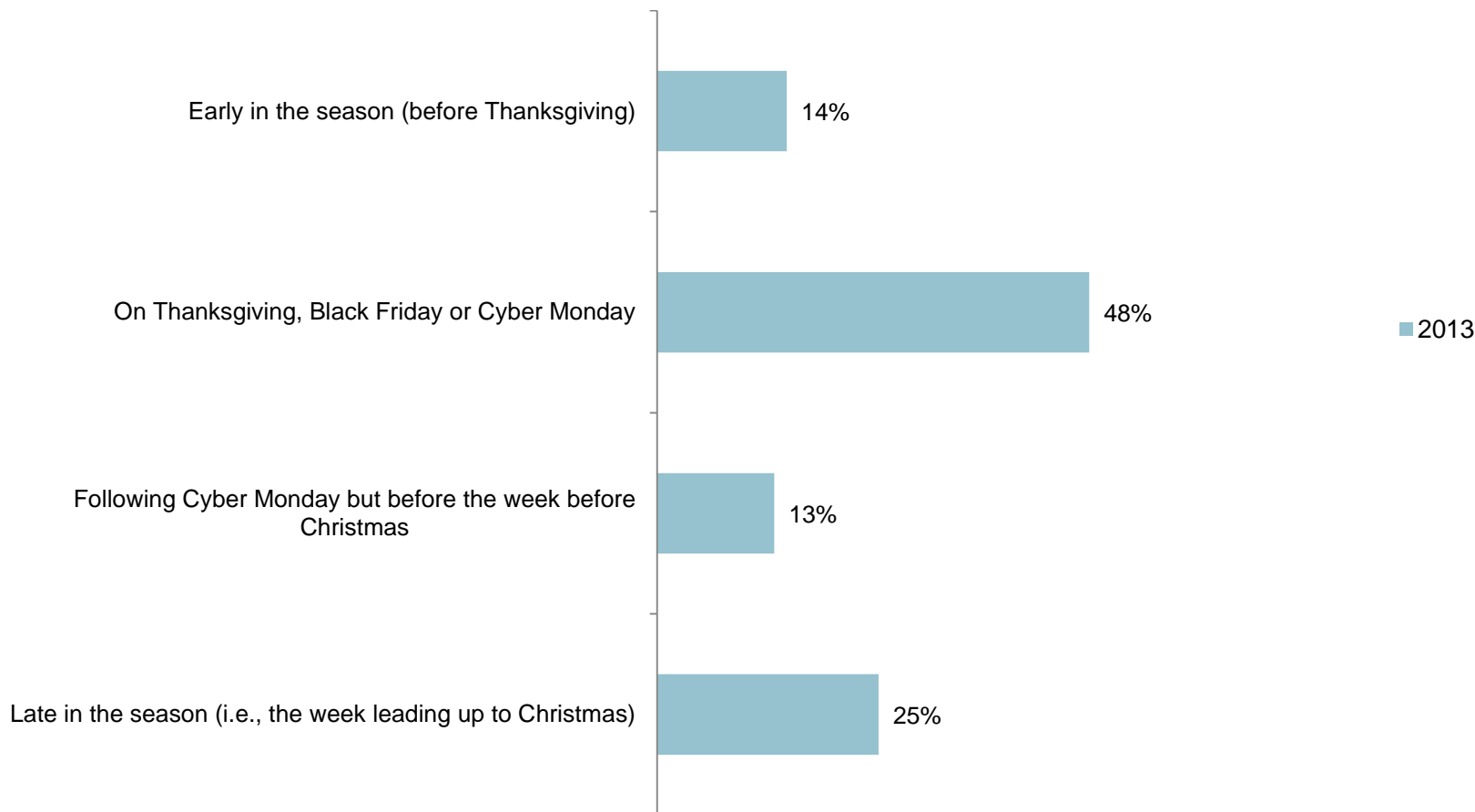
Check all that apply.





Most expect the best discounts to be on Thanksgiving Day, Black Friday or Cyber Monday

When do you expect the best discounts will be available?

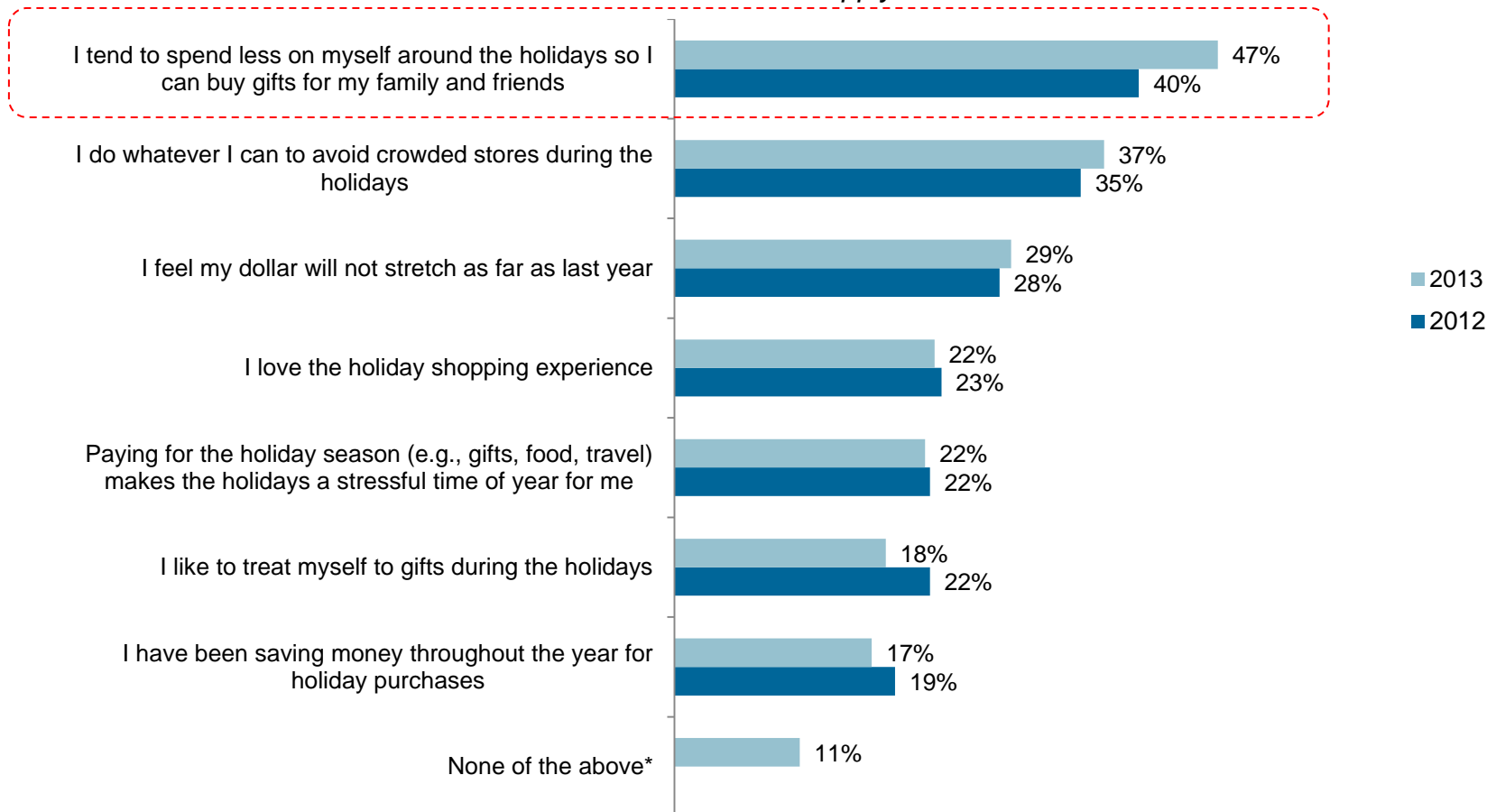


Most holiday shoppers buy gifts for others in lieu of themselves during the holidays



Please check the statements below that you agree with regarding holiday shopping.

Check all that apply.



*Response not included 2012



Executive Summary

Topline Results

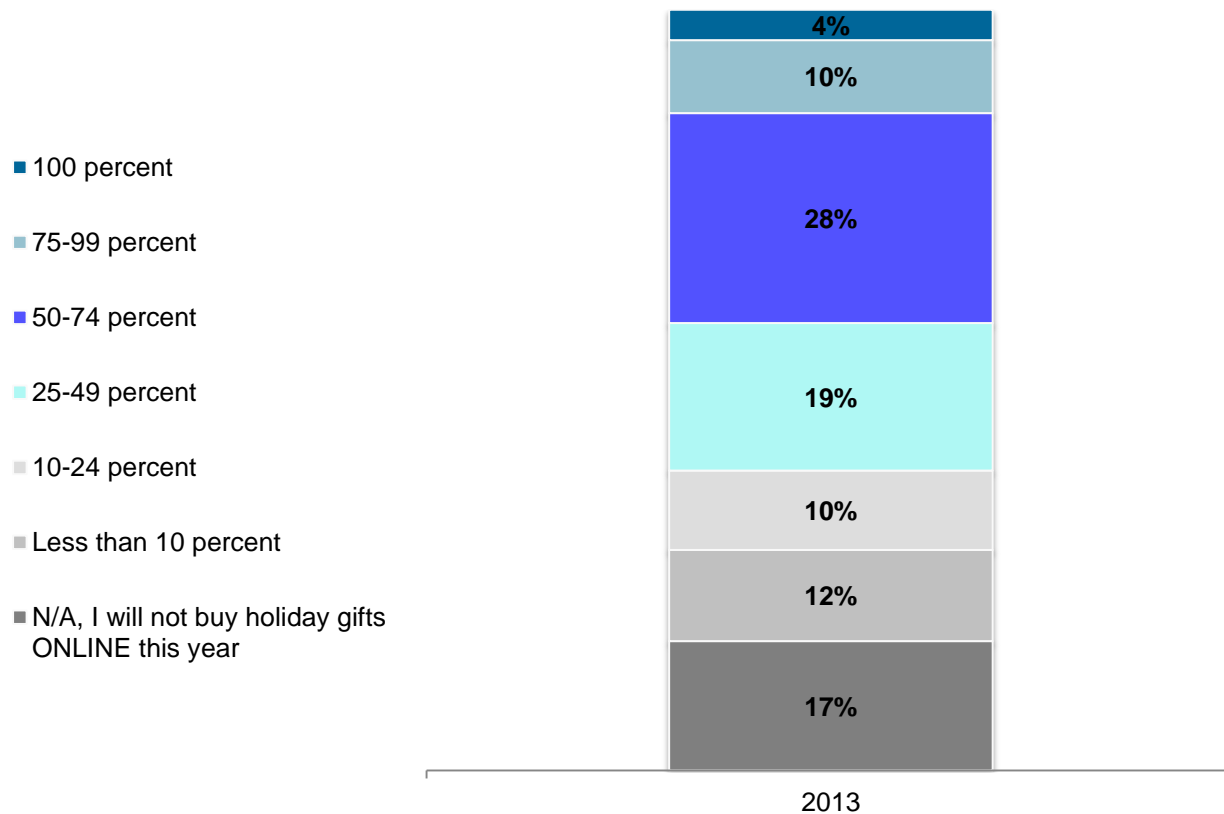
- Black Friday Shopping
- Online Shopping
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- Spending Trends and Influencers
- Cash and Credit
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- Gift Cards

Demographics

Two out of five will spend the majority of their holiday purchases online this year



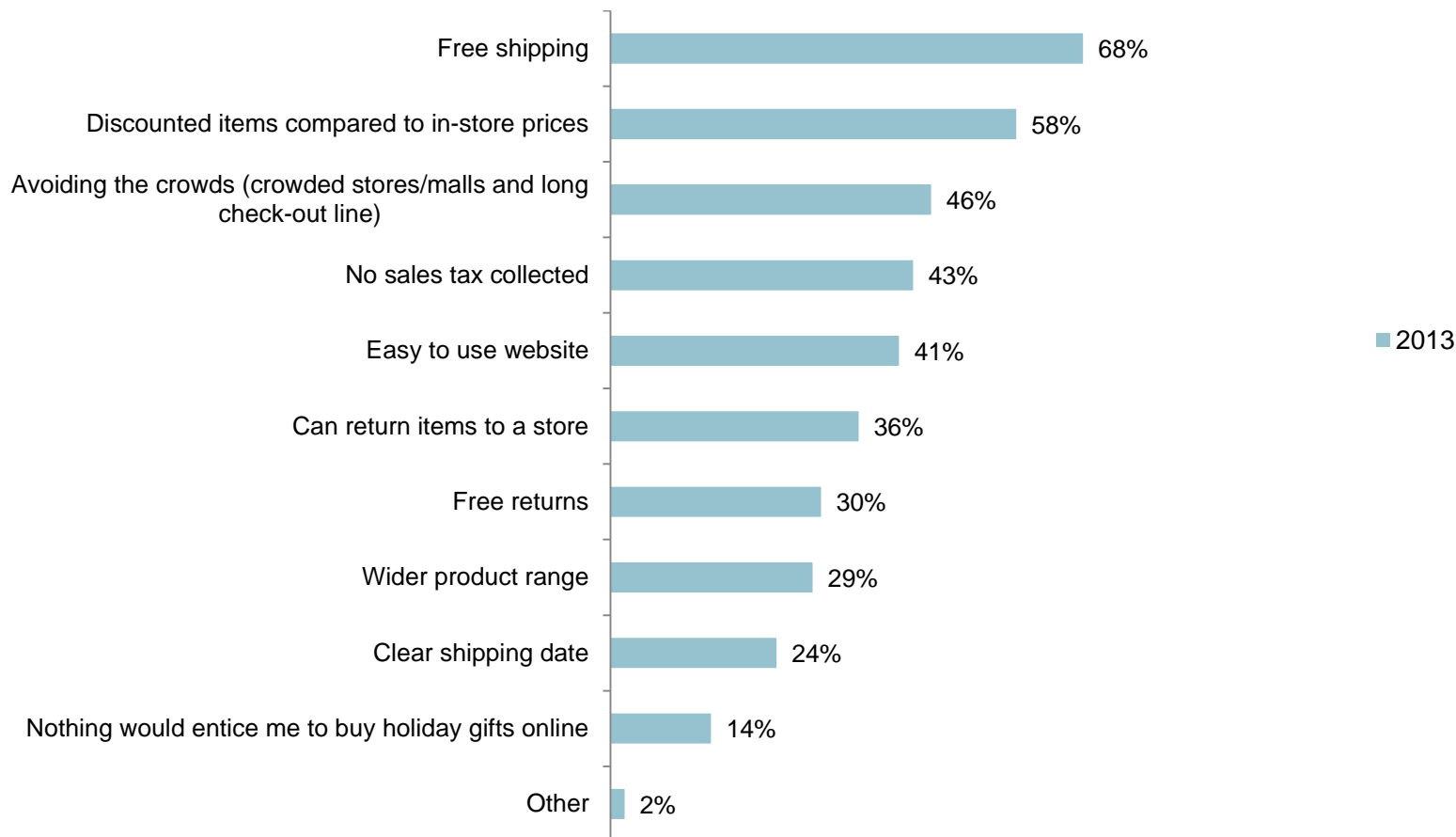
What percentage of your total holiday gift purchase dollars will you spend ONLINE this year?





Free shipping and online-only discounts would drive consumers to purchase their holiday gifts online

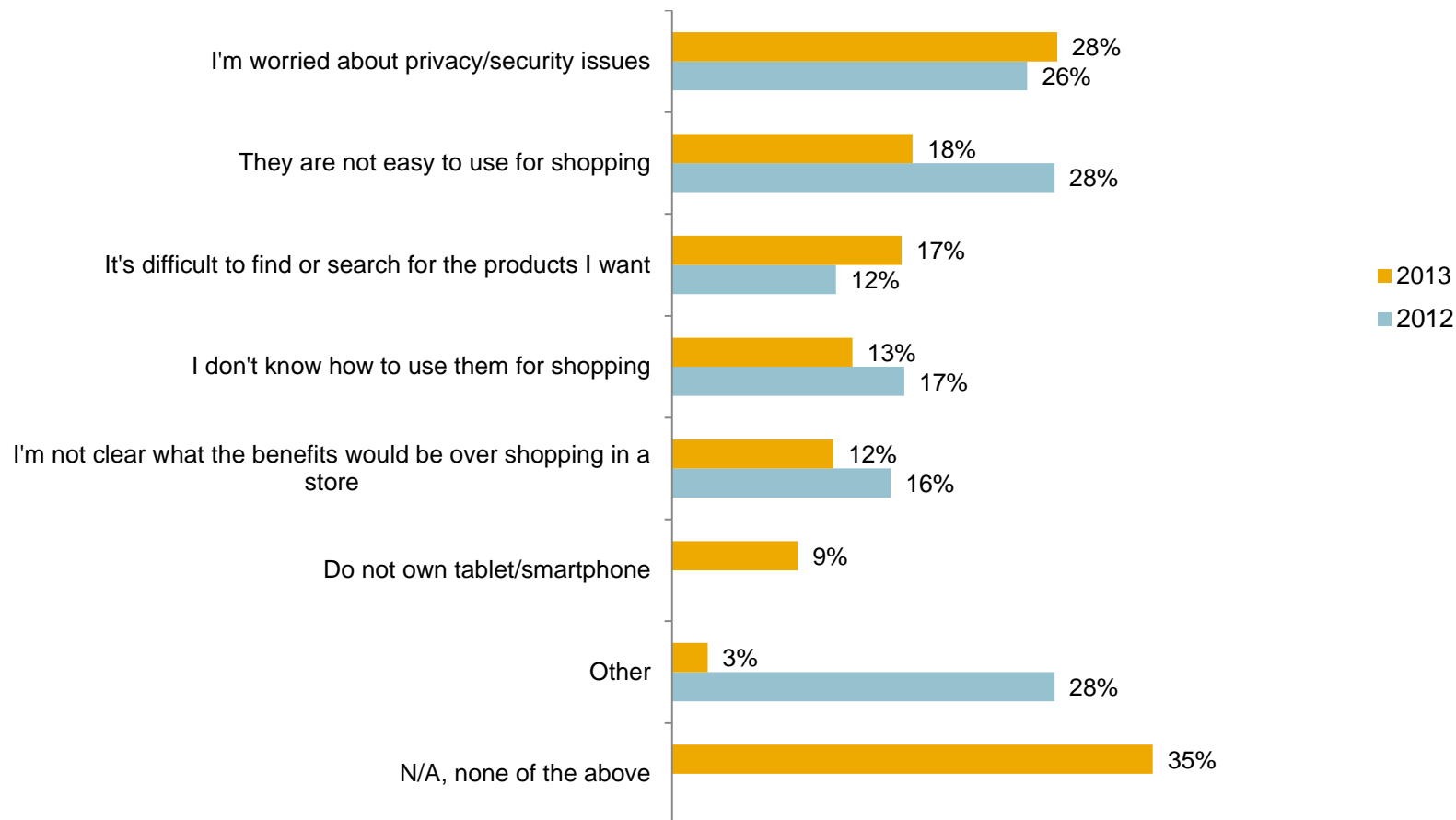
Which of the following would make you buy holidays gifts online?
Check all that apply,



Privacy concerns are limiting the number of consumers who will shop using a mobile device



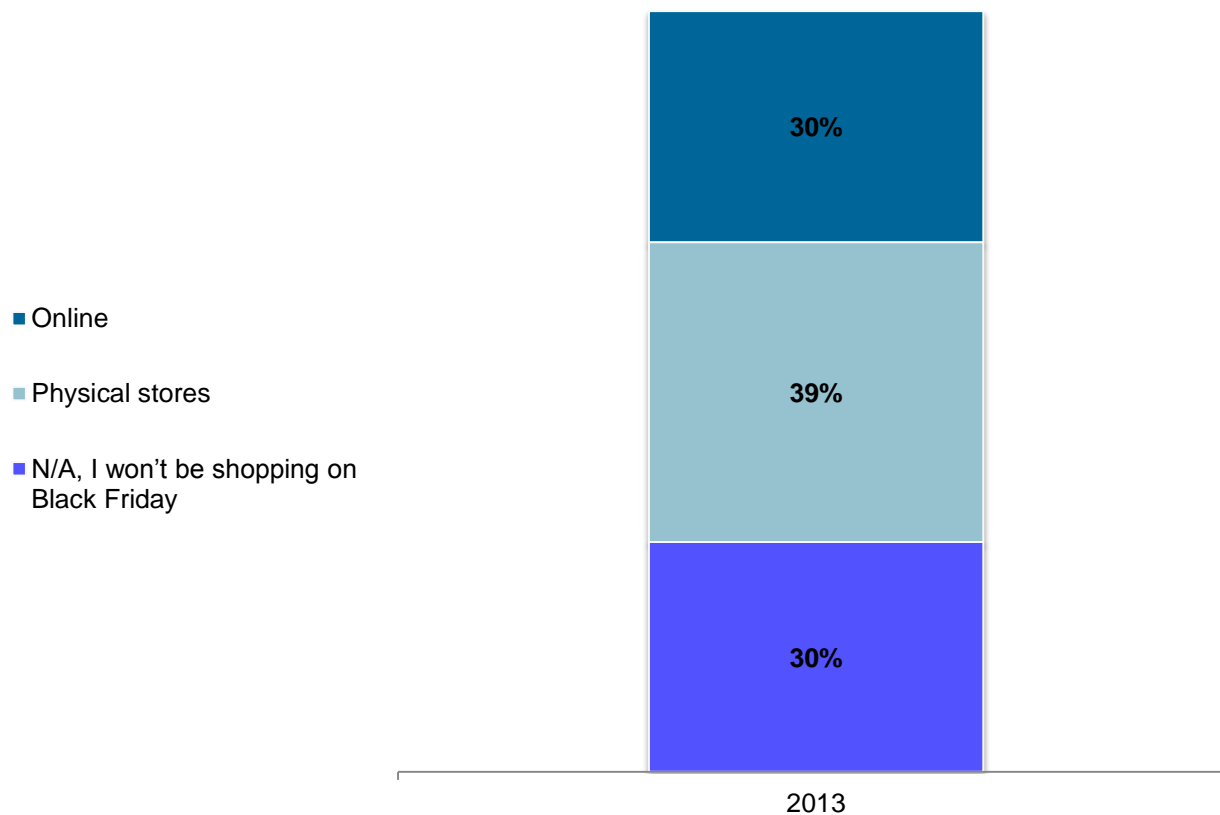
Which statements best describe why you would not shop using a tablet, smartphone?
Check all that apply,





The percentage of shoppers shopping online versus in a store on Black Friday is nearly equal

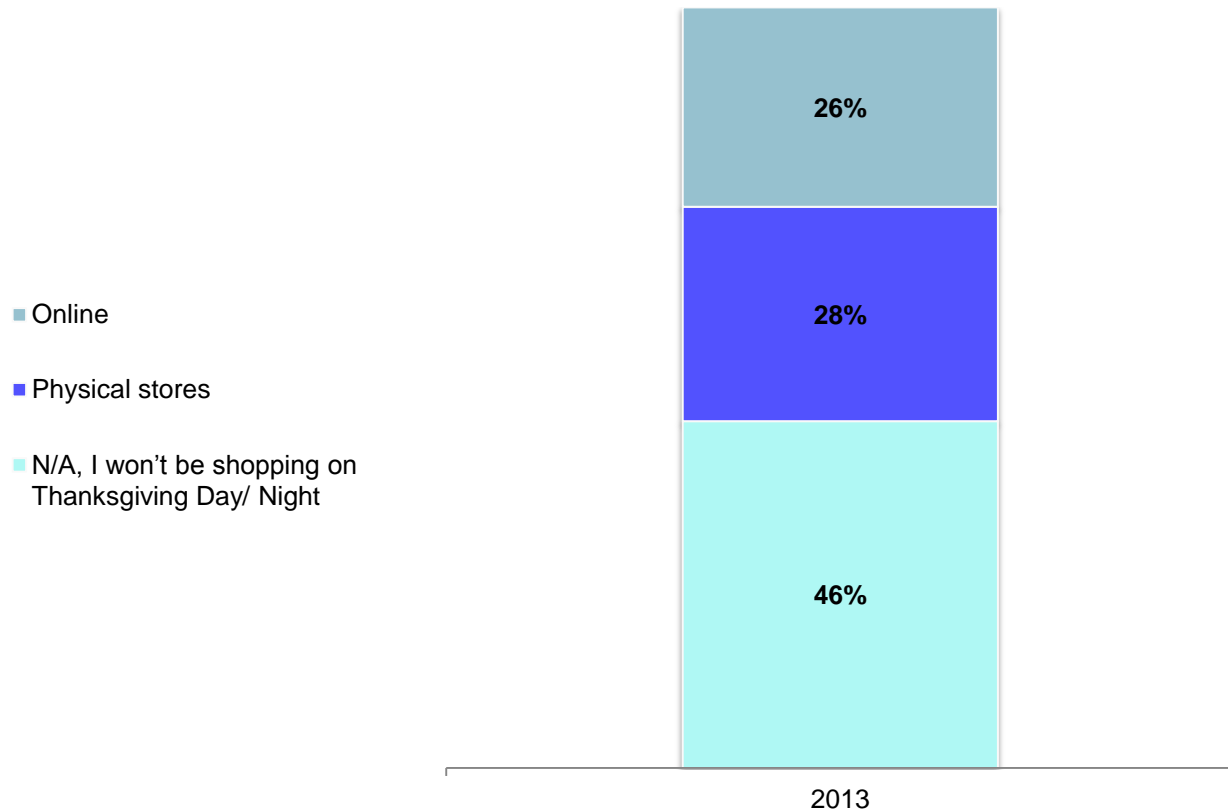
Will you do most of your Black Friday shopping online or in a physical store?





This shopping will be a combination of online and in-store

Will you do most of your Thanksgiving Day/Night shopping online or in a physical store?

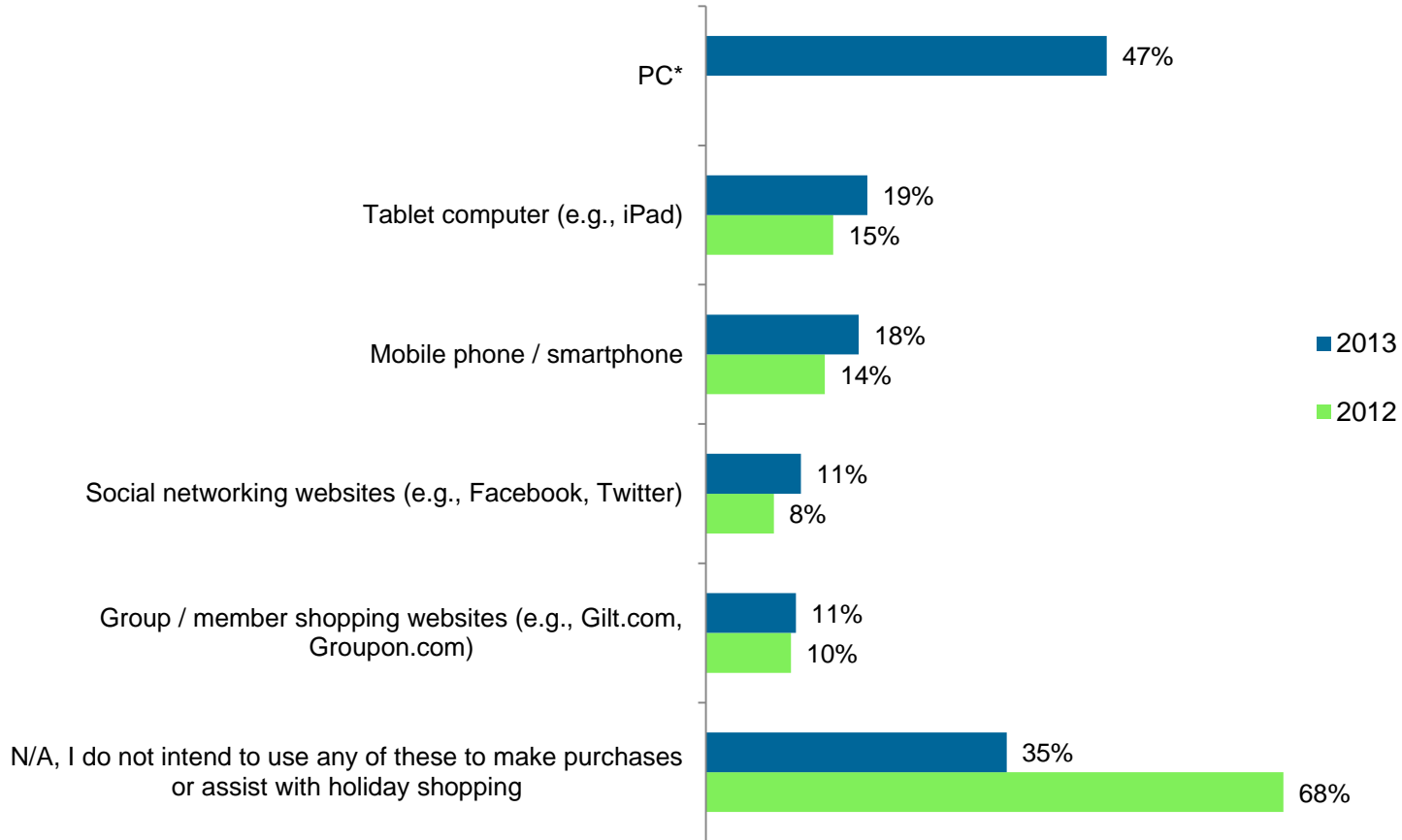




Most will use a PC to do their holiday shopping this year

Do you intend to use any of the following to make purchases or assist in your holiday shopping this year?

Check all that apply.



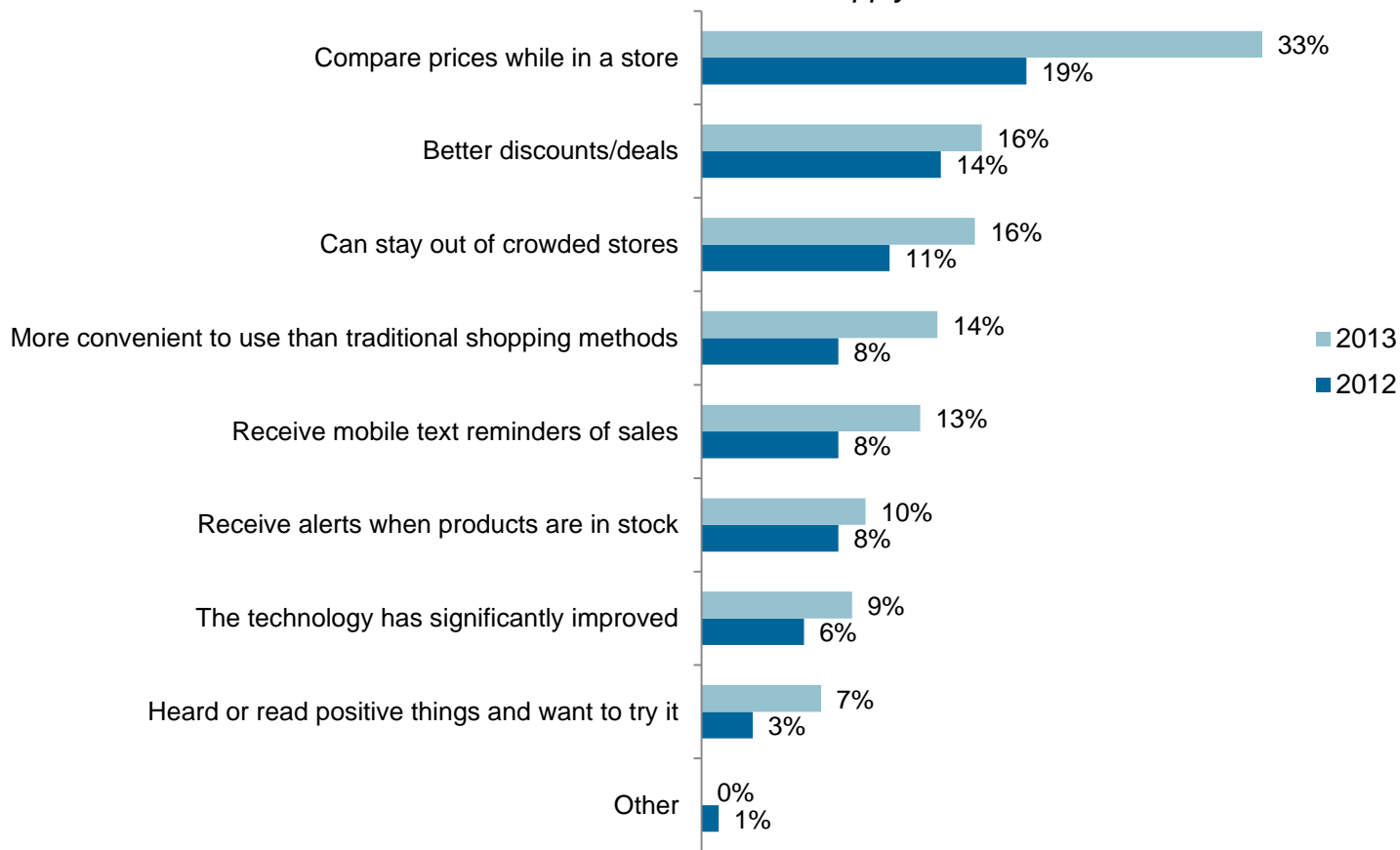
*Response not included 2011 or 2012

Most will shop using a mobile phone or tables to compare prices while in the store



Which statements best describe why you would shop using a mobile, Smartphone or tablet?

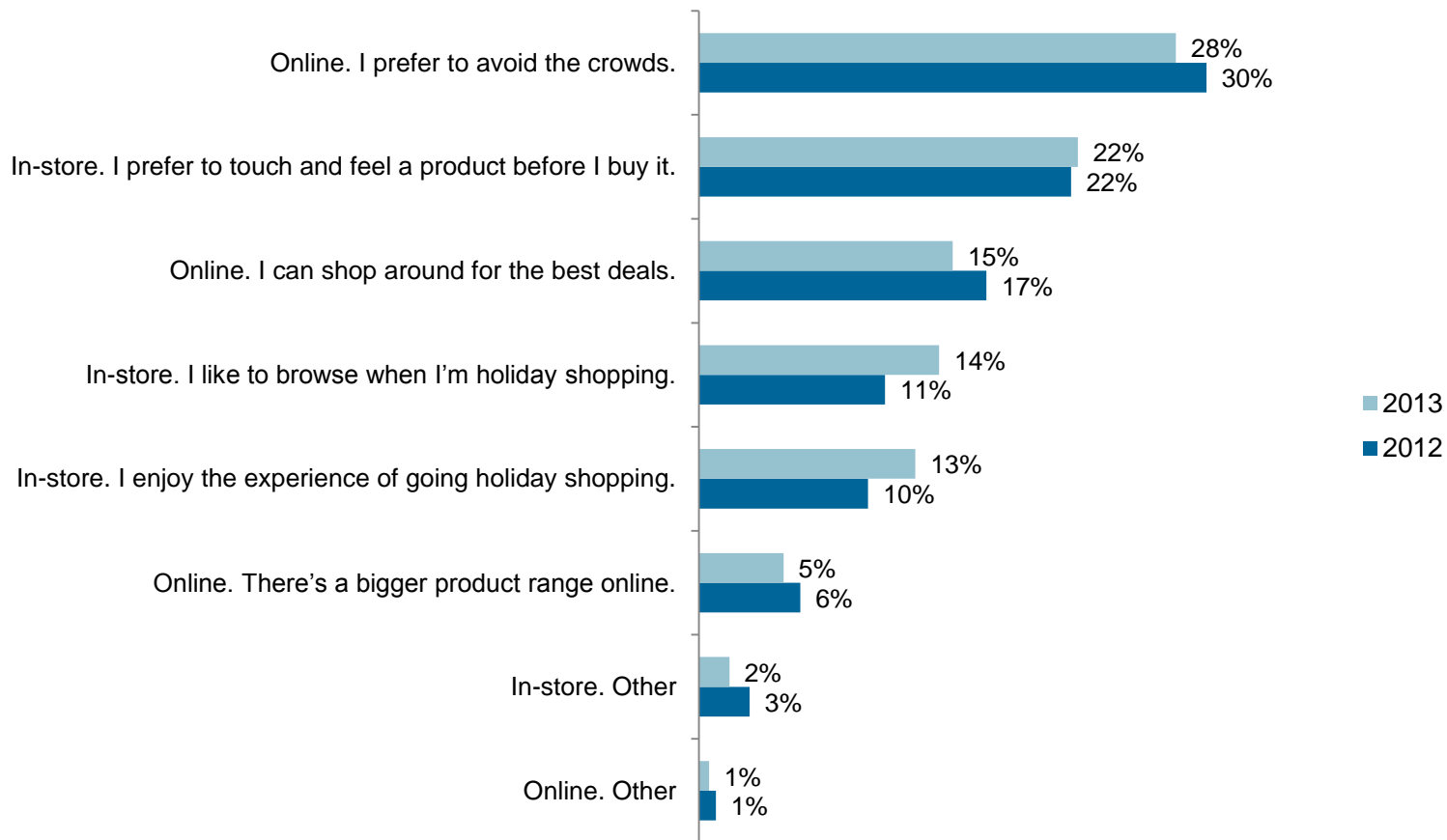
Check all that apply.



Shoppers generally prefer to shop online for the holidays to avoid the crowds; shopping in store is also popular as shoppers like to touch the product before buying



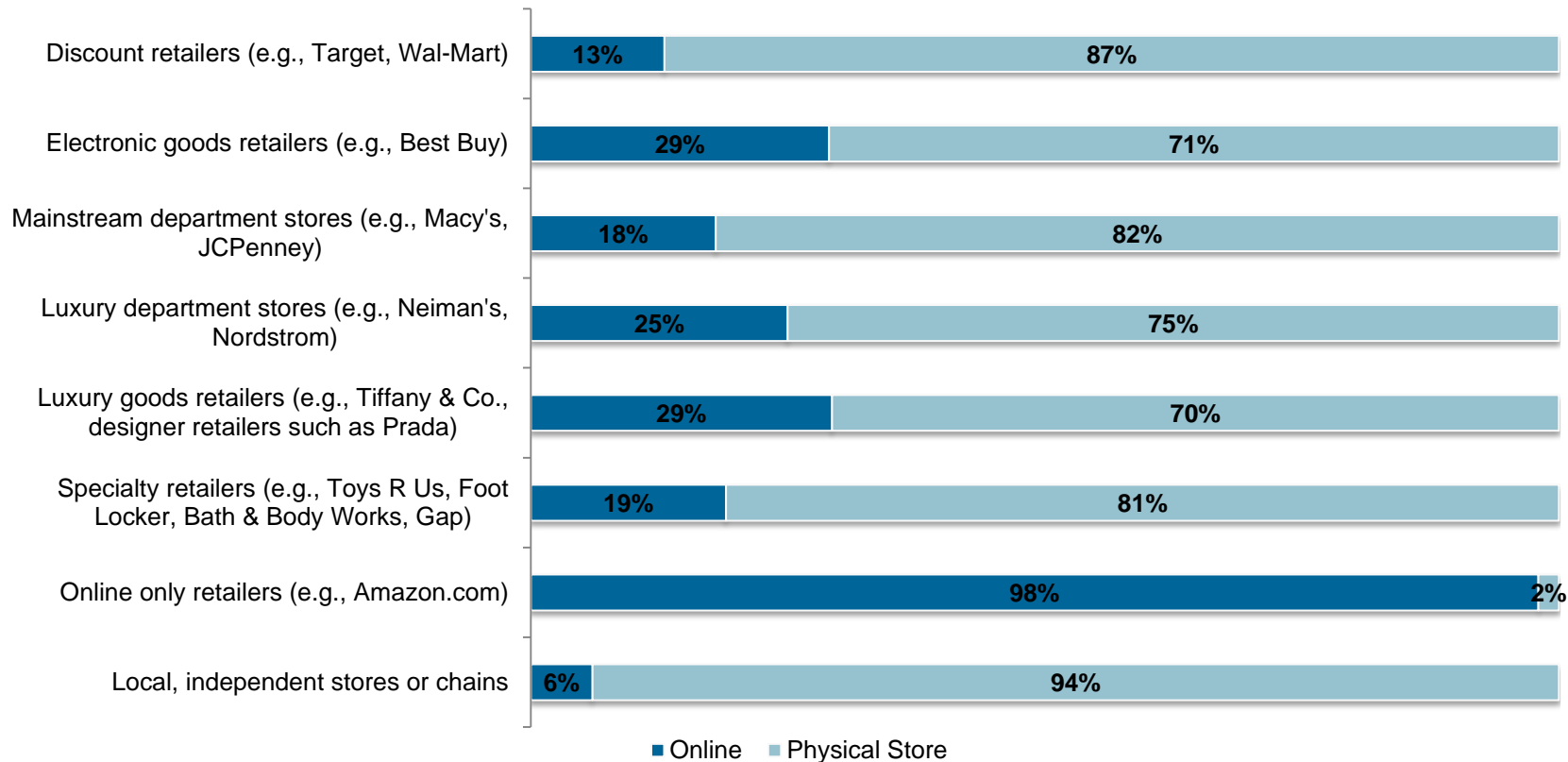
If a retailer sells their products both online and in physical stores, which shopping option do you prefer for the holiday season, and why?





For most, the majority of purchases will be in a physical store across all retail categories

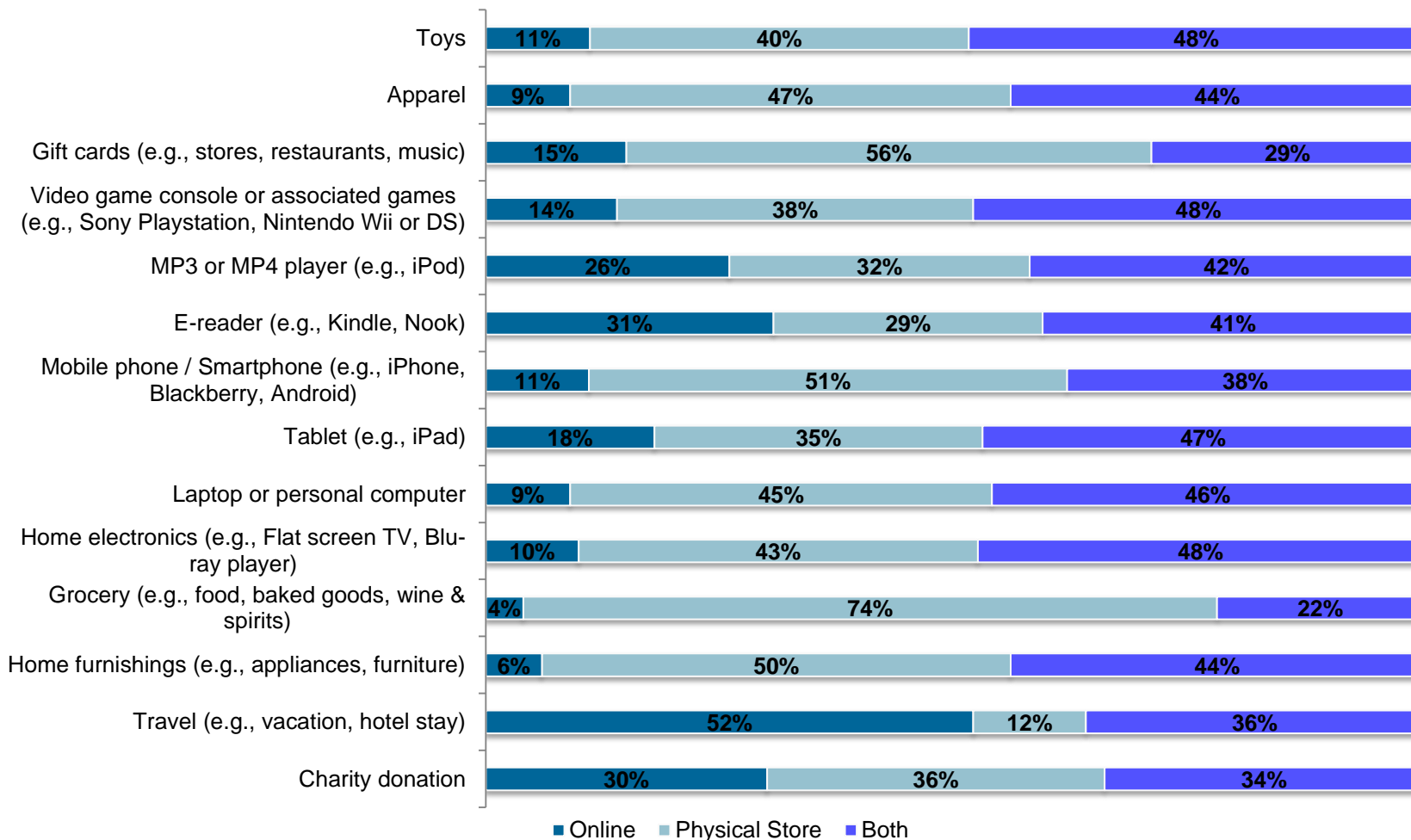
Where do you expect to make the majority of your purchases for each of these stores?





Most expect to make their purchases across categories in a physical store

Where do you expect to make your purchases for each of these categories?





Executive Summary

Topline Results

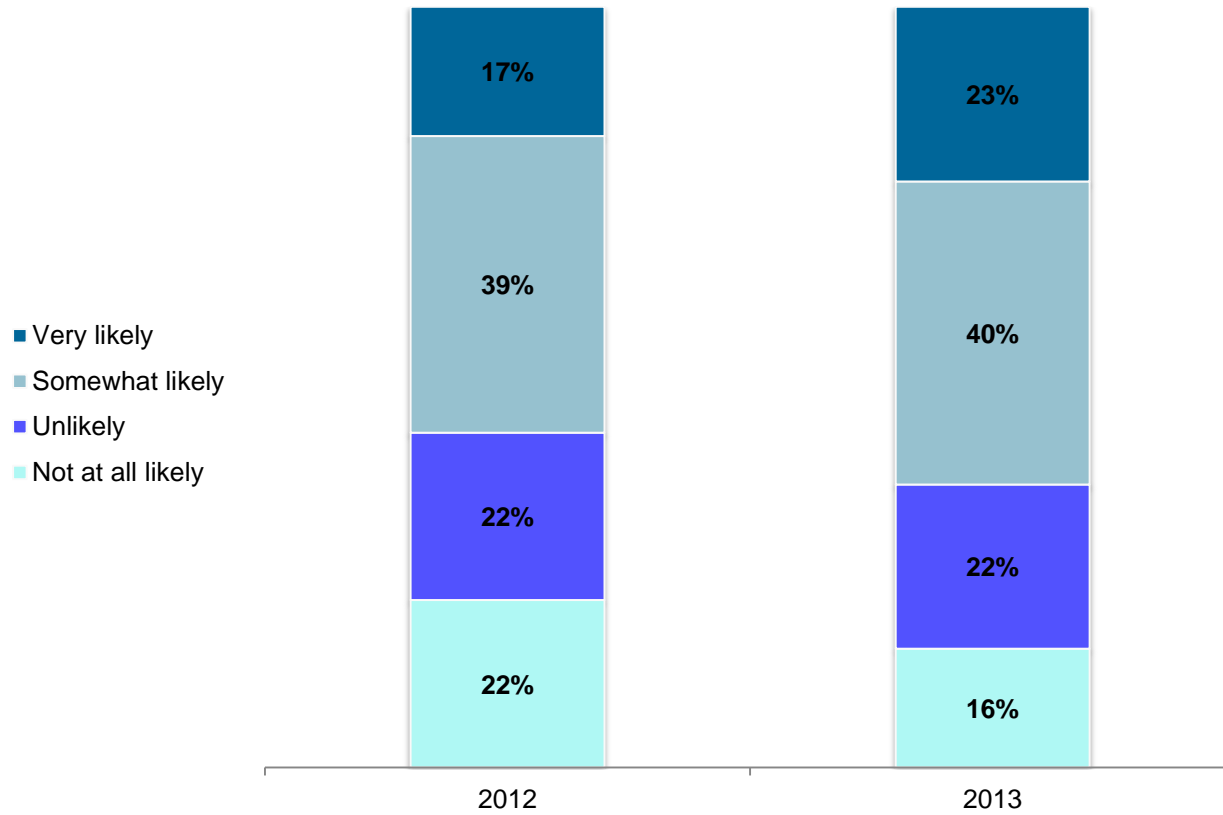
- Black Friday Shopping
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Demographics



Showrooming is more likely this year compared to last year

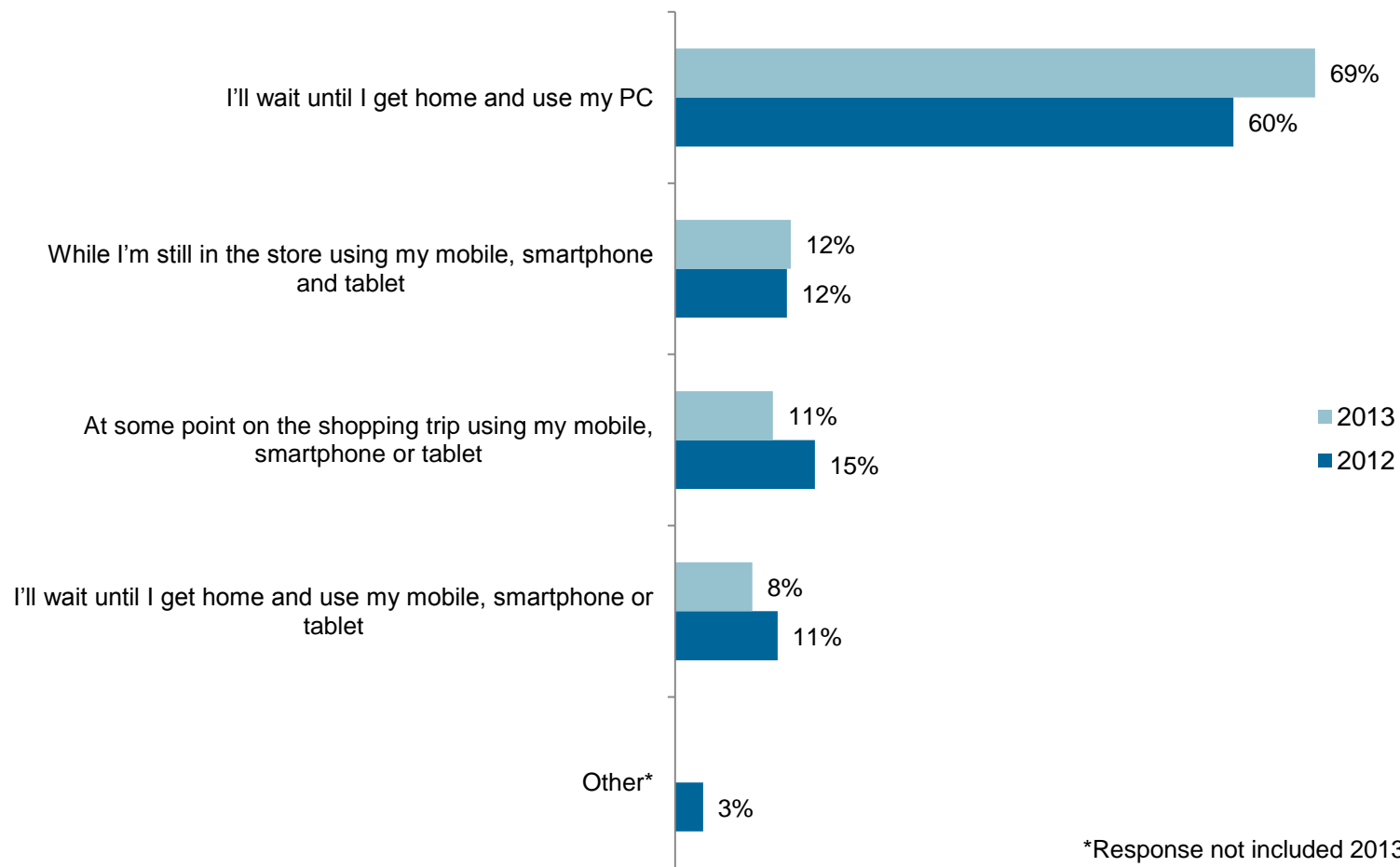
How likely are you to go to a store to look for a gift item then search online for the best price and purchase online?





Mobility has a way to go as most of those who find the best deal online will buy that item on their PC at home over using their mobile device

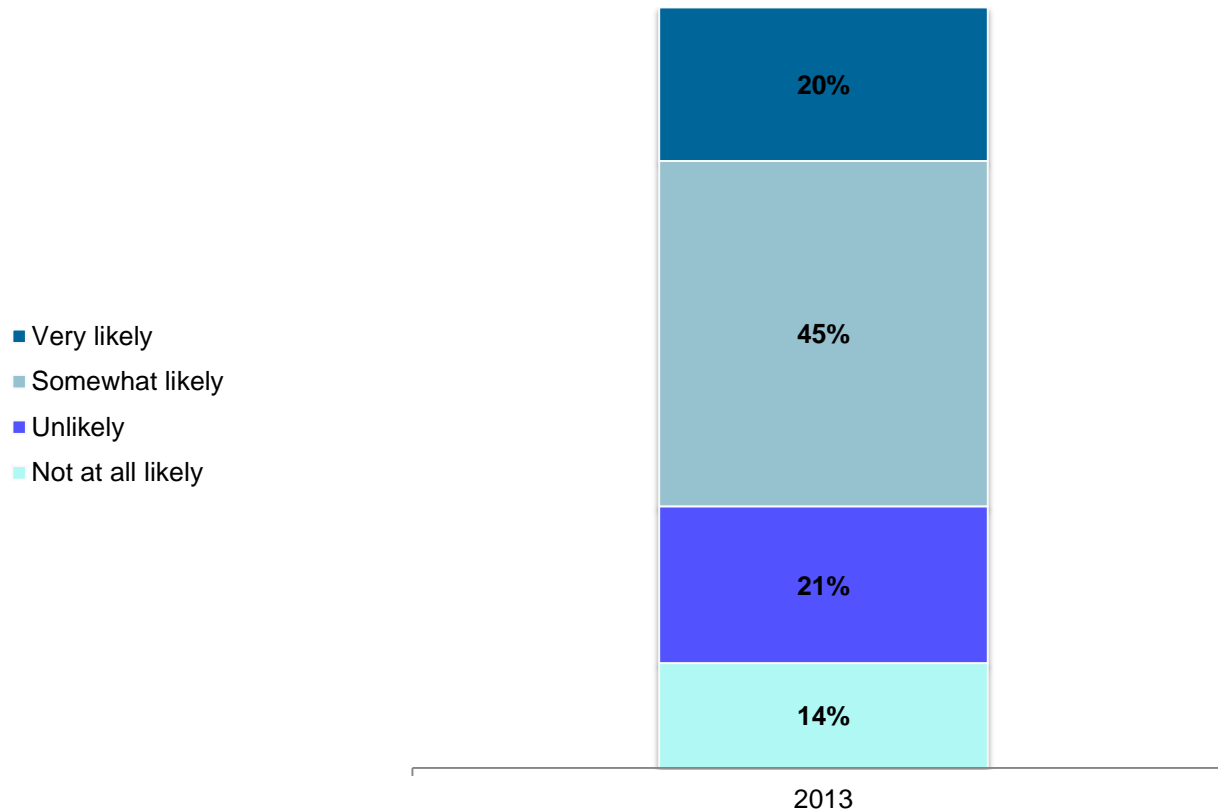
If you find a better price online, when and how are you most likely to buy that item?





“Webrooming” is popular with nearly two-thirds of holiday shoppers

How likely are you to look at items online, go to a store to see the item, then make your purchase at the store?





The main drivers for webrooming are avoiding shipping fees and seeing the item before purchasing. Some check online for store availability

Why would you look online for an item before going to the physical store to make a purchase?

Check all that apply.





Executive Summary

Topline Results

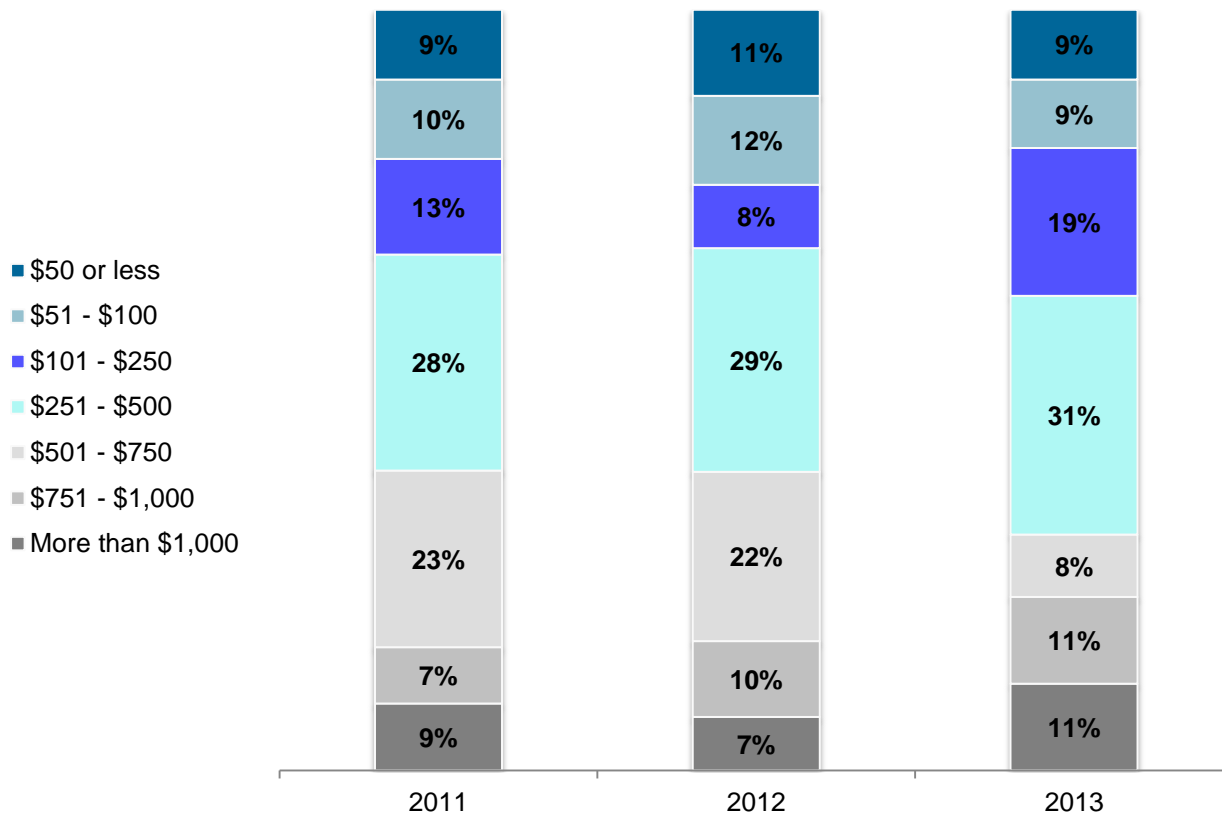
- Black Friday Shopping
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- **Spending Trends and Influencers**
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Demographics



Most will spend between \$250 and \$500 in total on holiday shopping

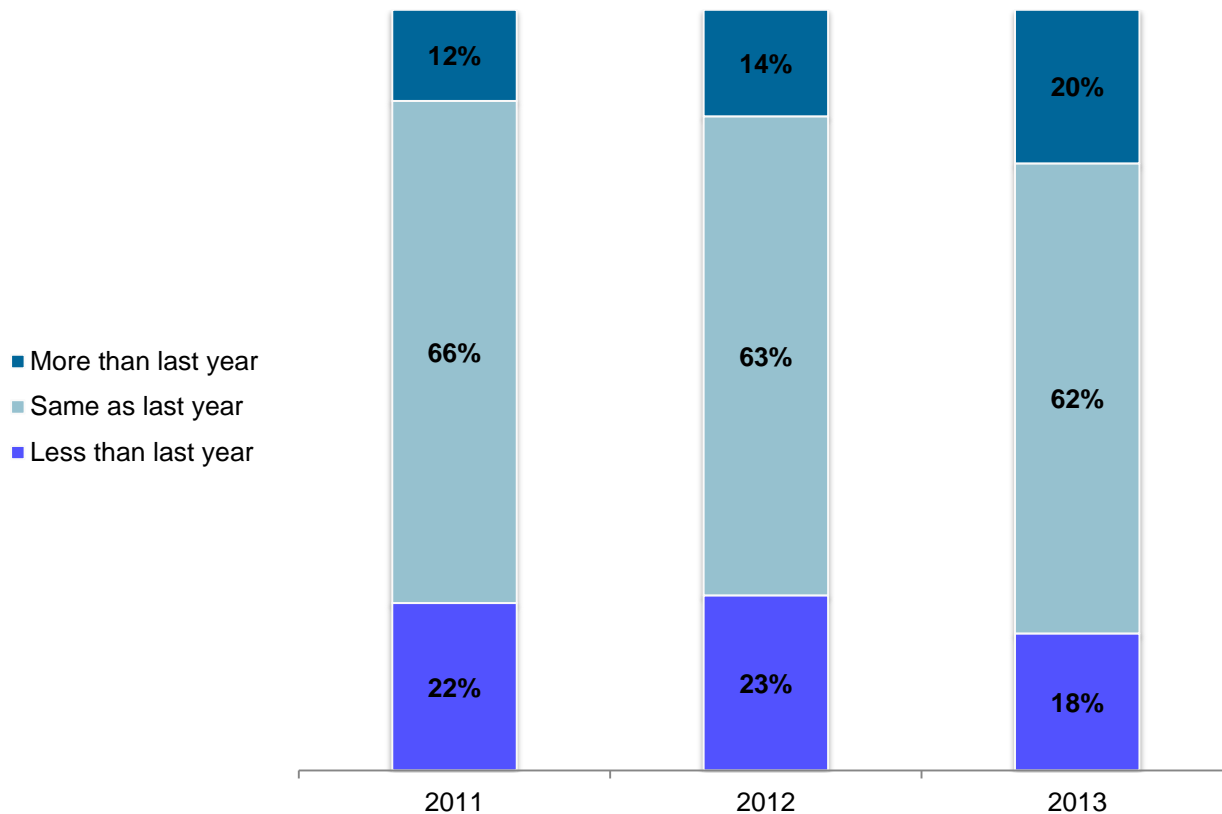
How much do you expect to spend in total on holiday shopping this year?





More shoppers will be spending more on their holiday shopping this year compared to last year...

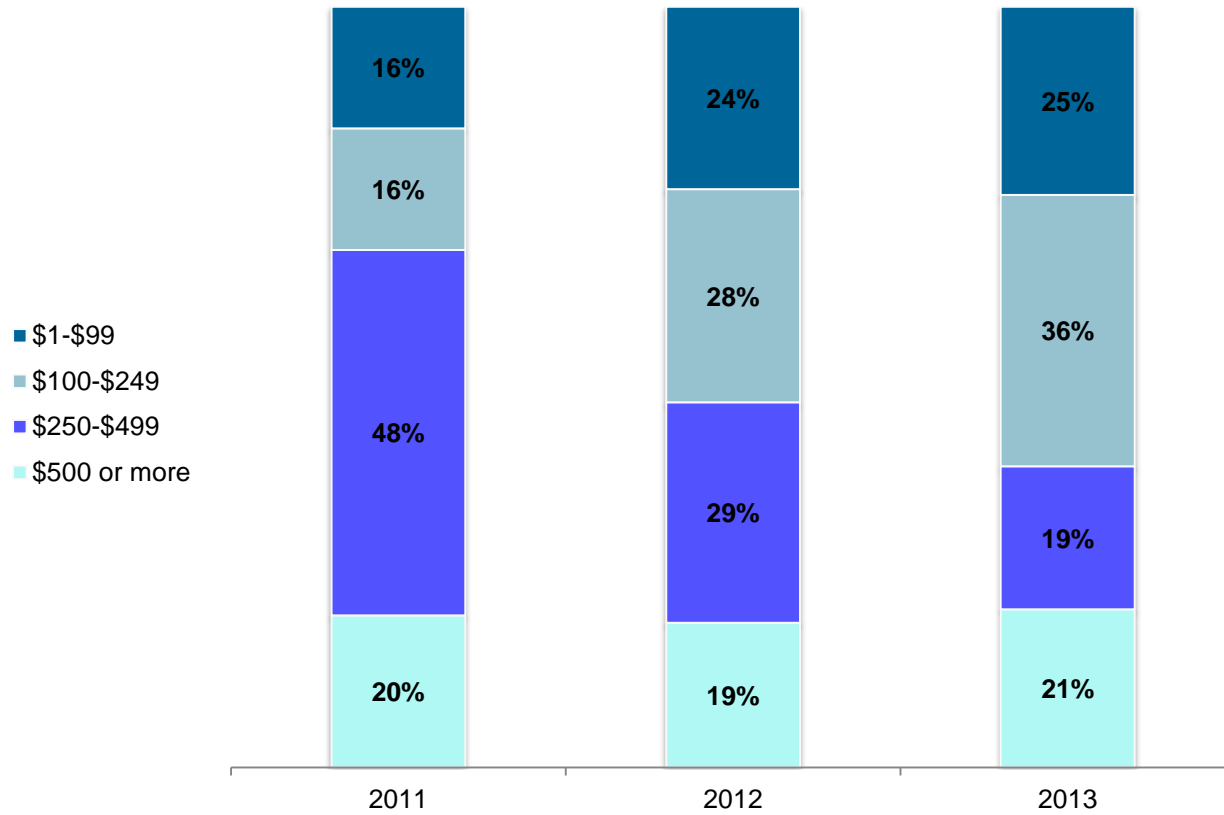
Do you expect to spend more, the same, or less on your holiday shopping this year compared to last year?





...but spending is expected lower compared to prior years

How much more do you estimate you will spend on your holiday shopping this year compared to last year?

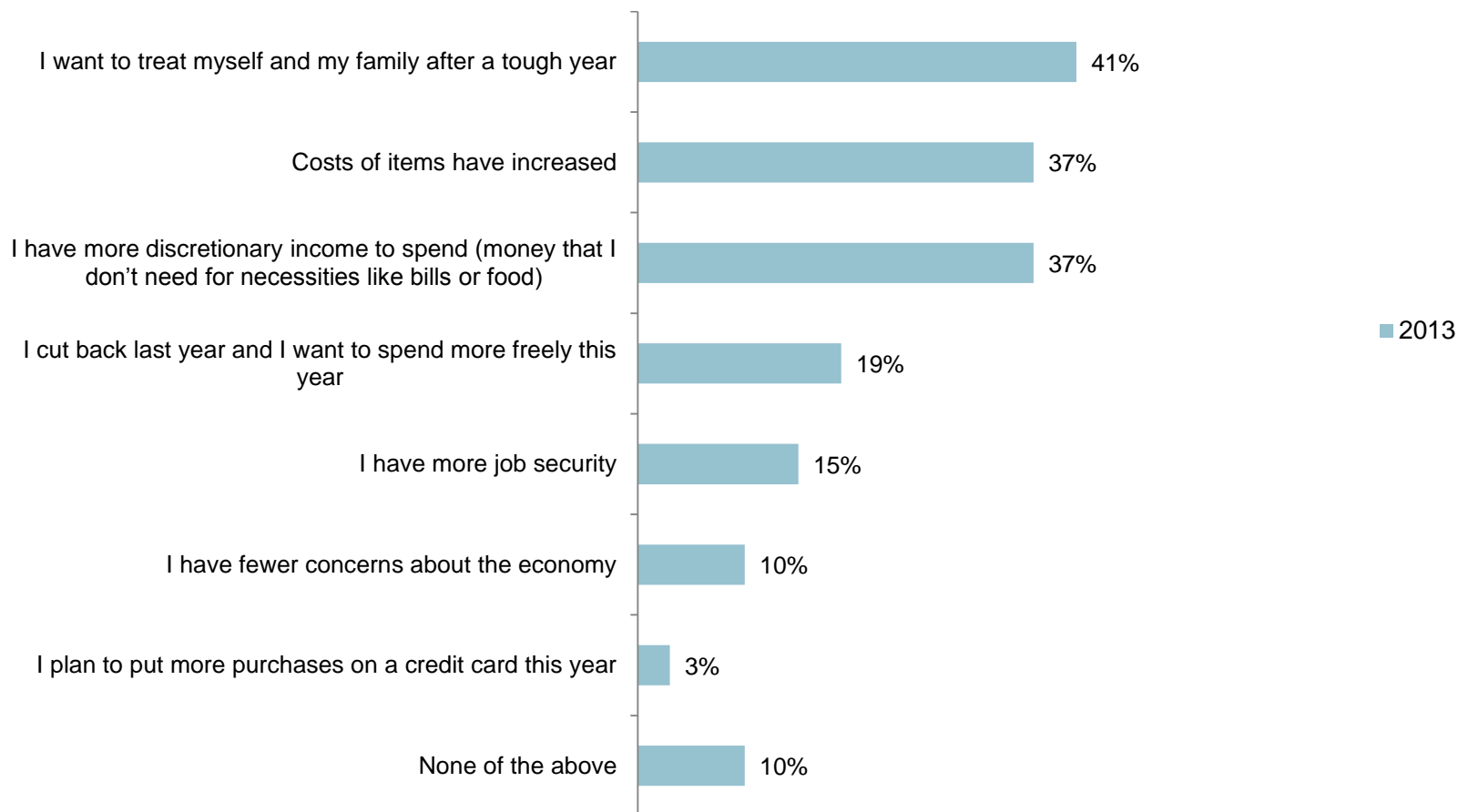


Those spending more this year have more discretionary income and will treat themselves. In addition, costs have increased causing consumers to spend more



Why are you spending more this year?

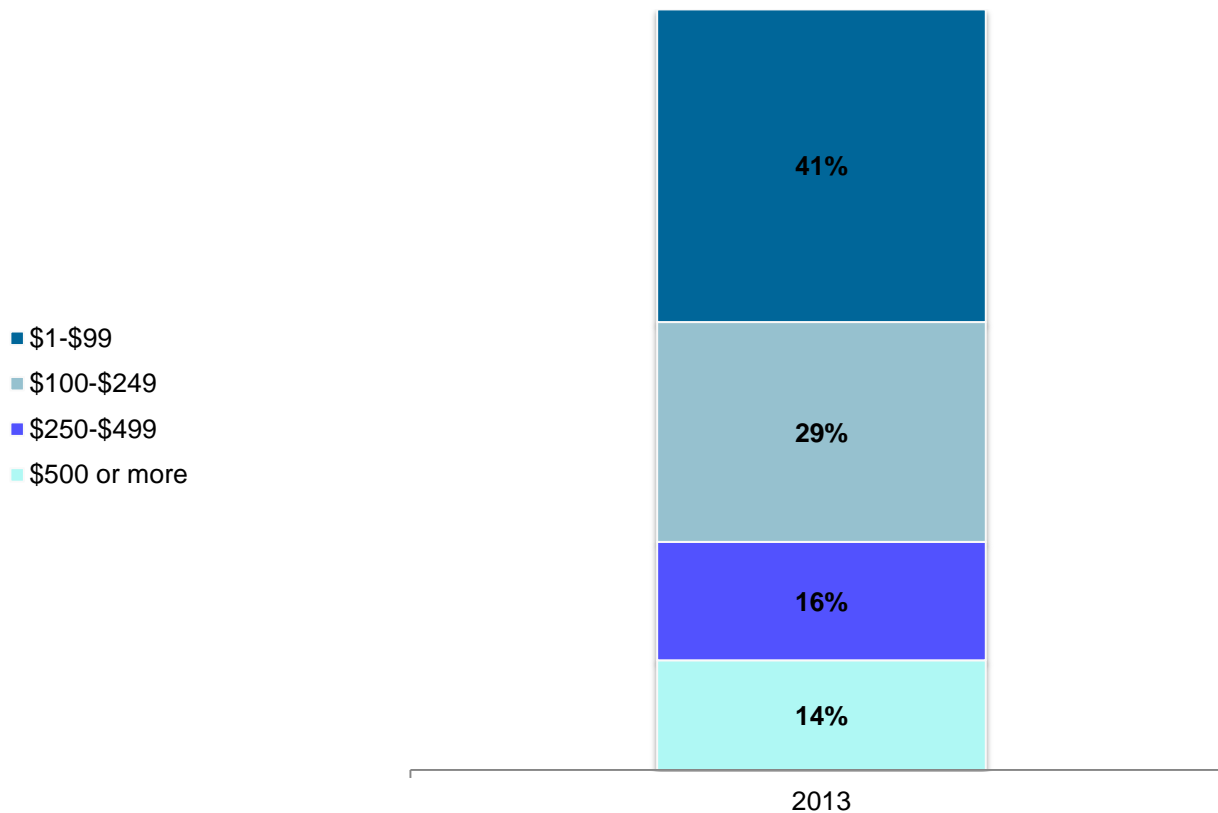
Check all that apply.





Among those spending less, most will cut \$100 or less from their holiday spending compared to last year

How much less do you estimate you will spend on your holiday shopping this year compared to last year?

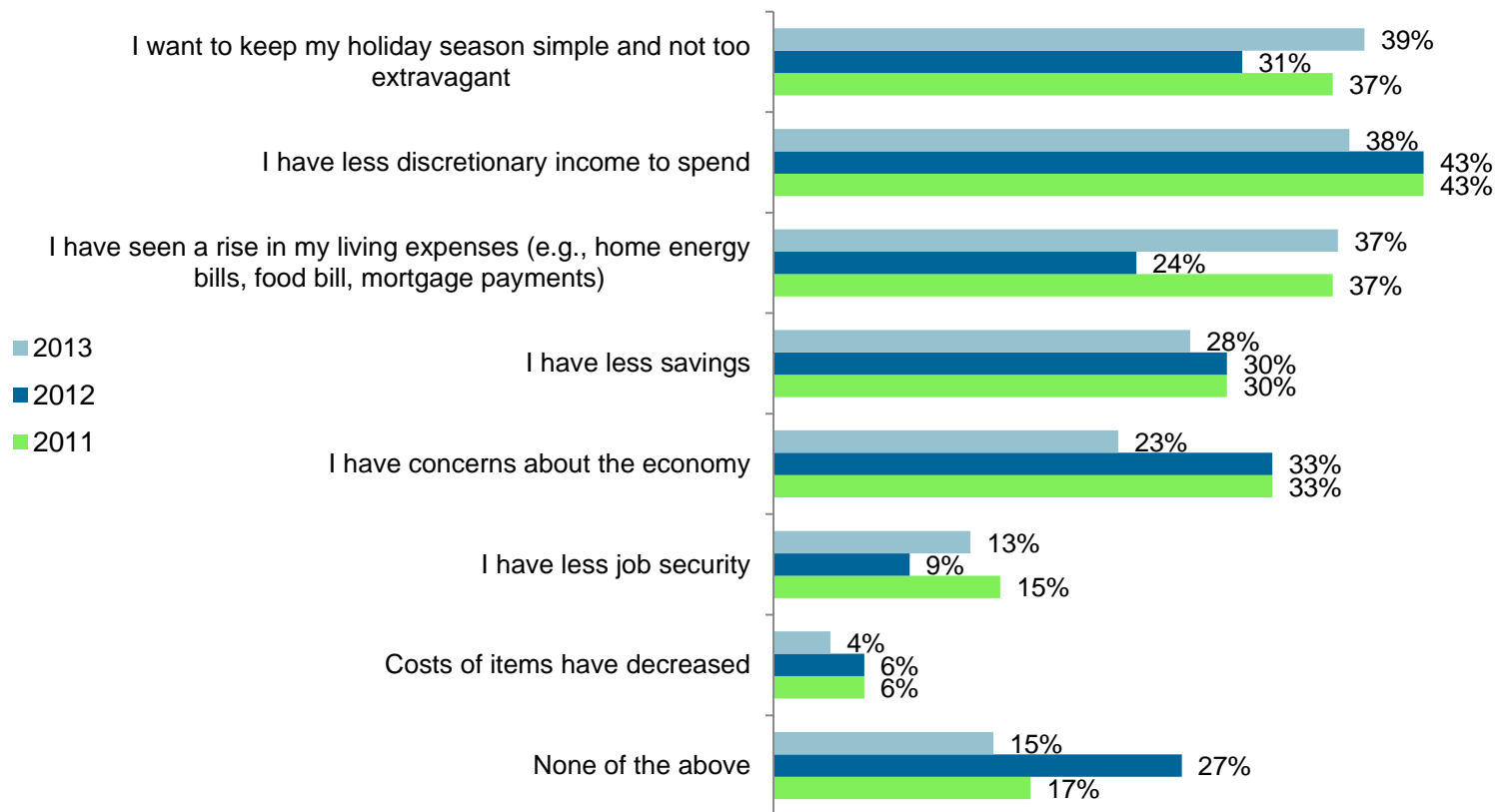




Reasons for those spending less are trying to keep things simple, less discretionary income and increased cost of living

Why are you not spending more this year?

Check all that apply.

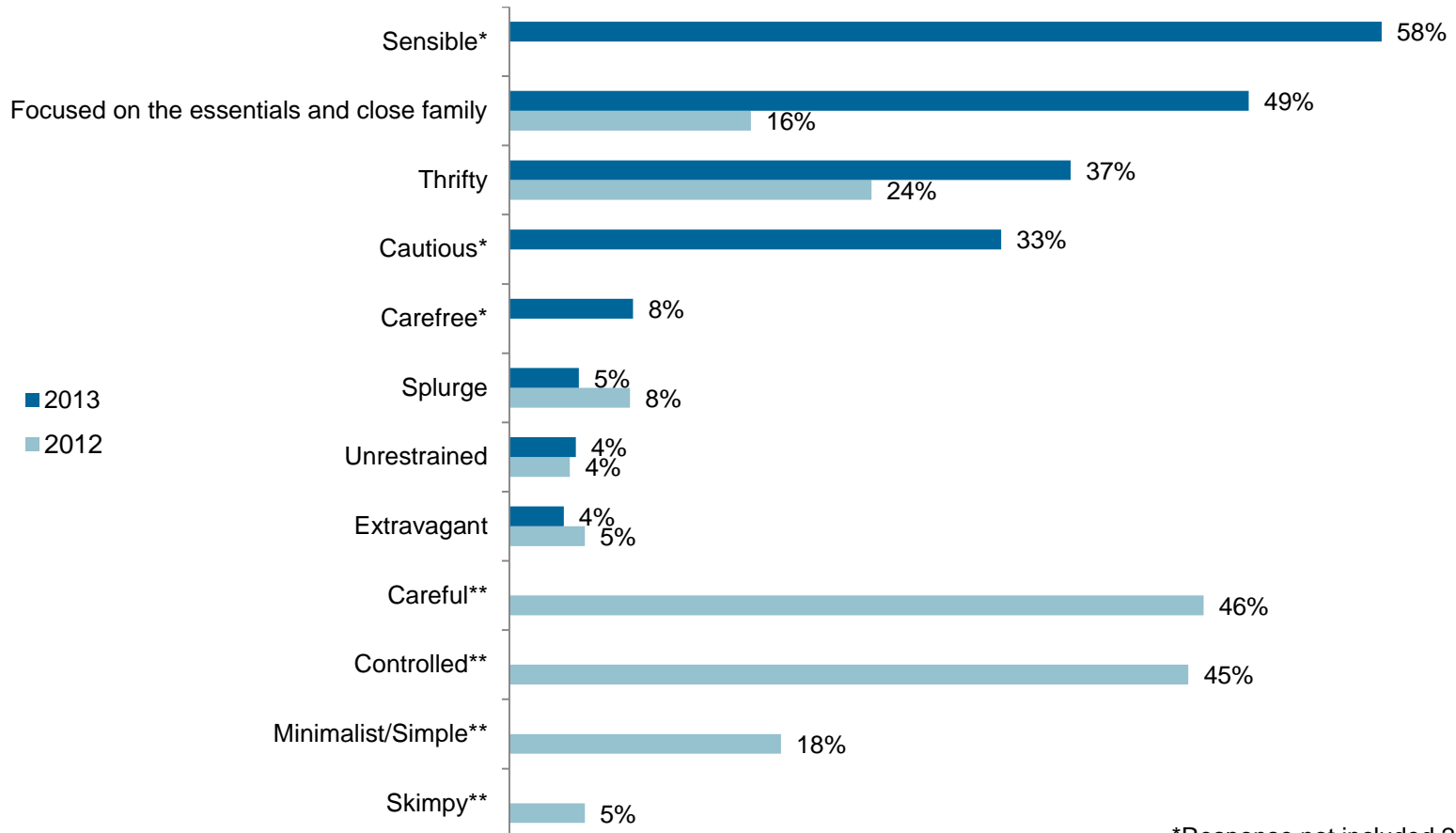




“Sensible” and “focused on essentials” are terms consumers use to describe their spending this holiday season

Which of the phrases best describe your intended level of spending during the holiday season?

Check all that apply.



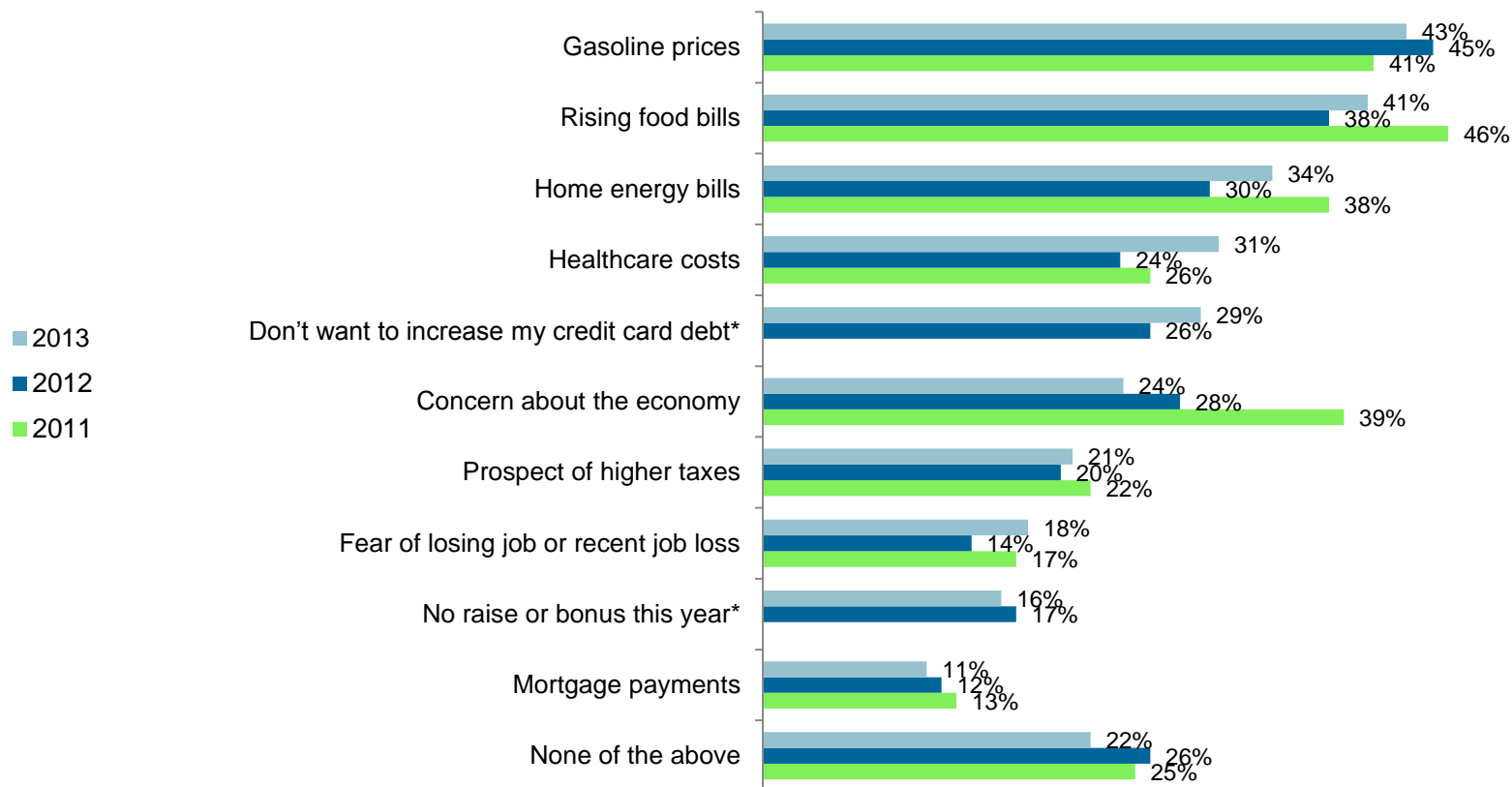
*Response not included 2012
 **Response not included 2013

Gas prices, cost of food and energy as well as health care are negatively affecting holiday shopping spend



Which of the following factors would negatively affect your holiday shopping spending this year?

Check all that apply.

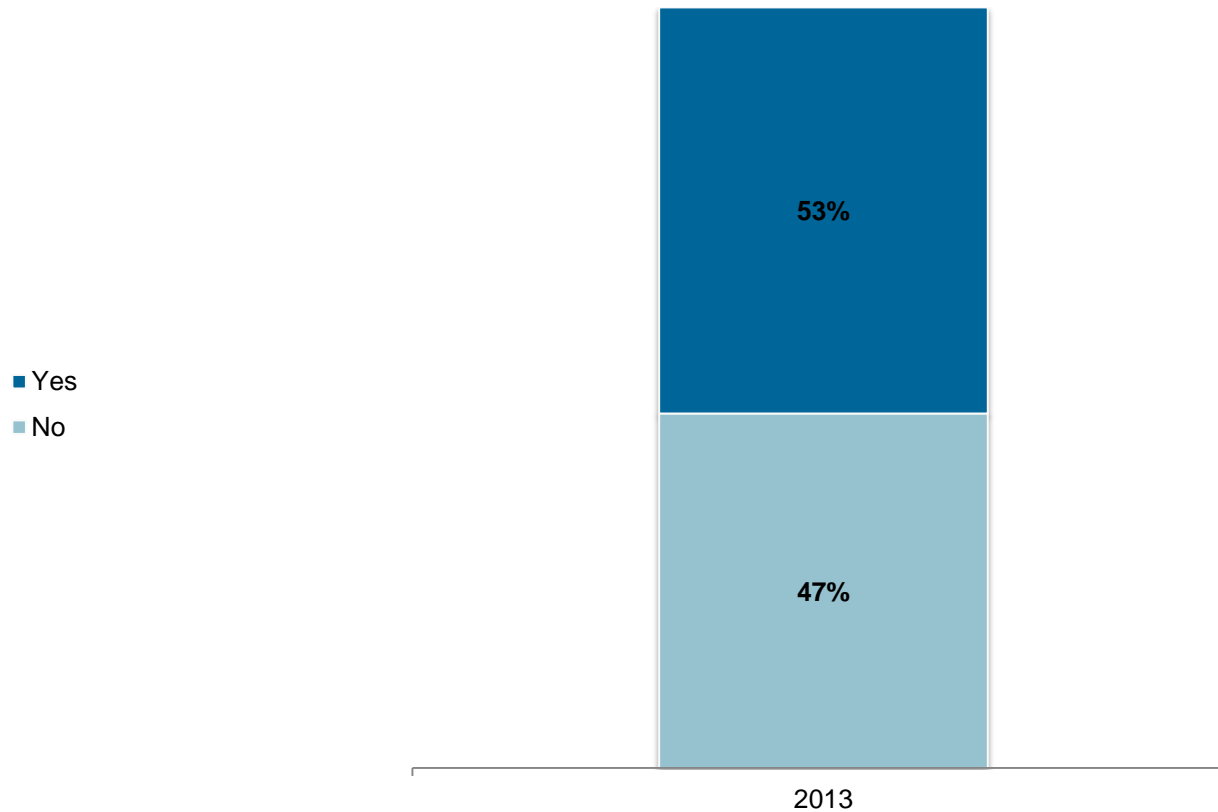


*Response not included 2011



Most will set a holiday budget at the start of the holidays...

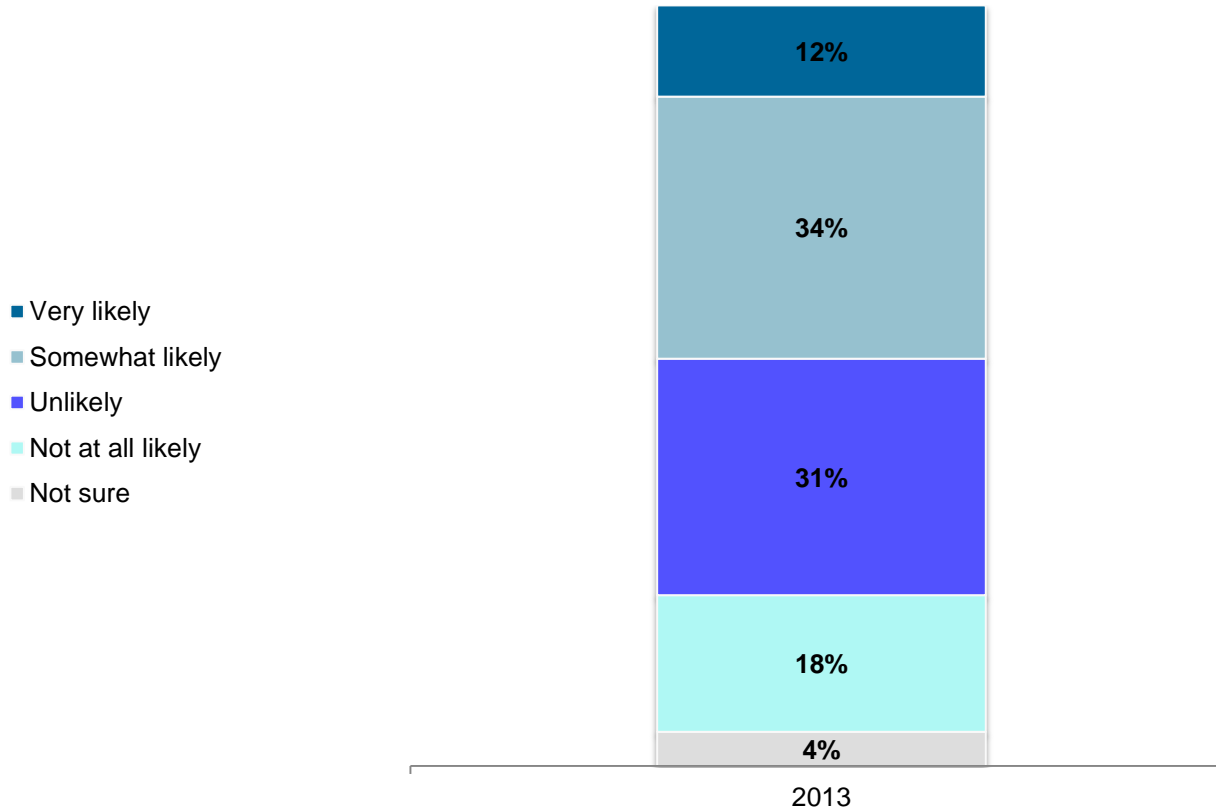
Will you set a holiday budget with a maximum dollar amount at the start of the holiday season this year?





...and many are likely to overspend that holiday shopping budget

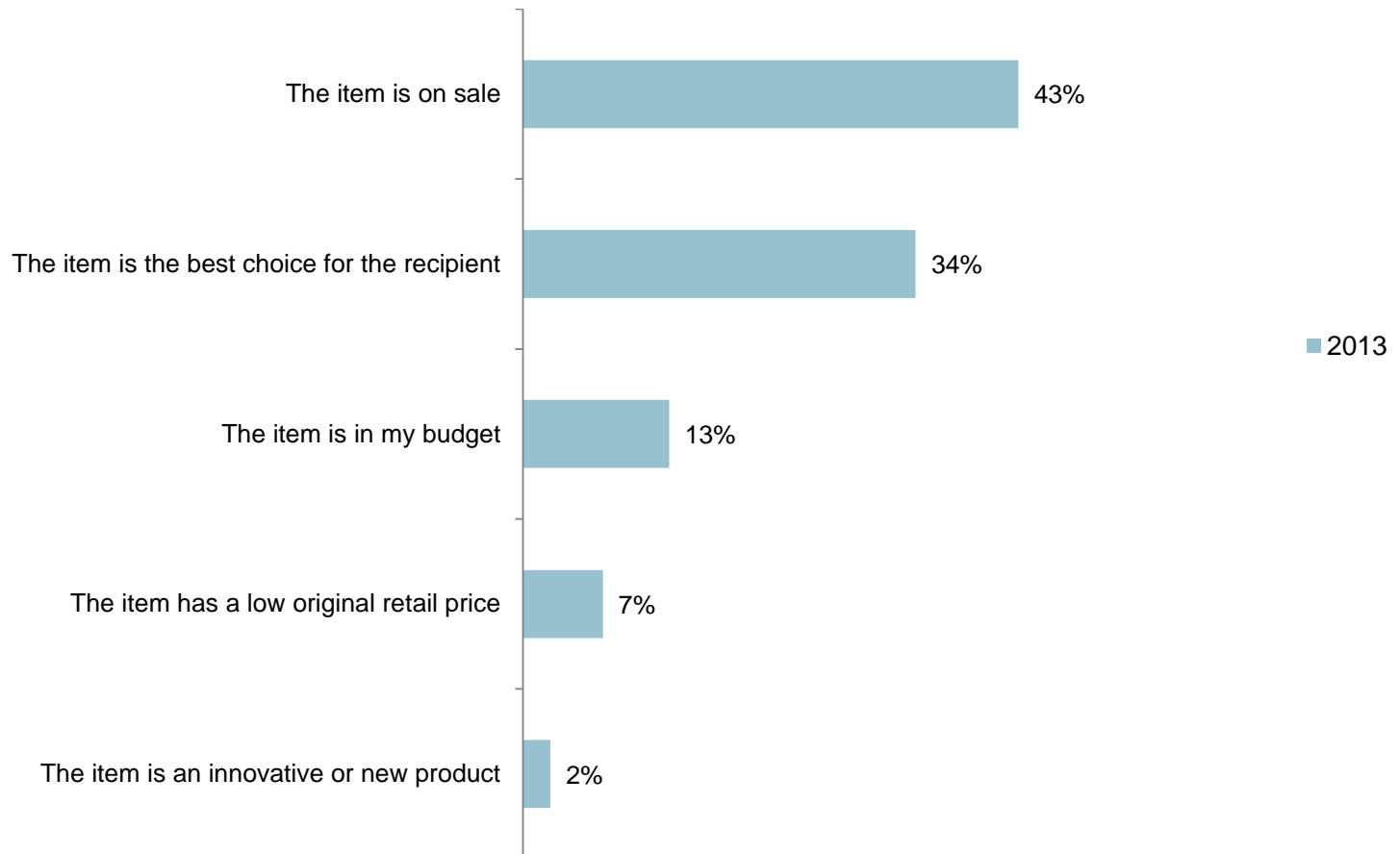
How likely are you to overspend your holiday shopping budget?





Sales will be the primary driver of purchase decisions

Please rank the following factors in terms of which will be most important to you this year when making a decision about an item to purchase.
TOP CHOICE

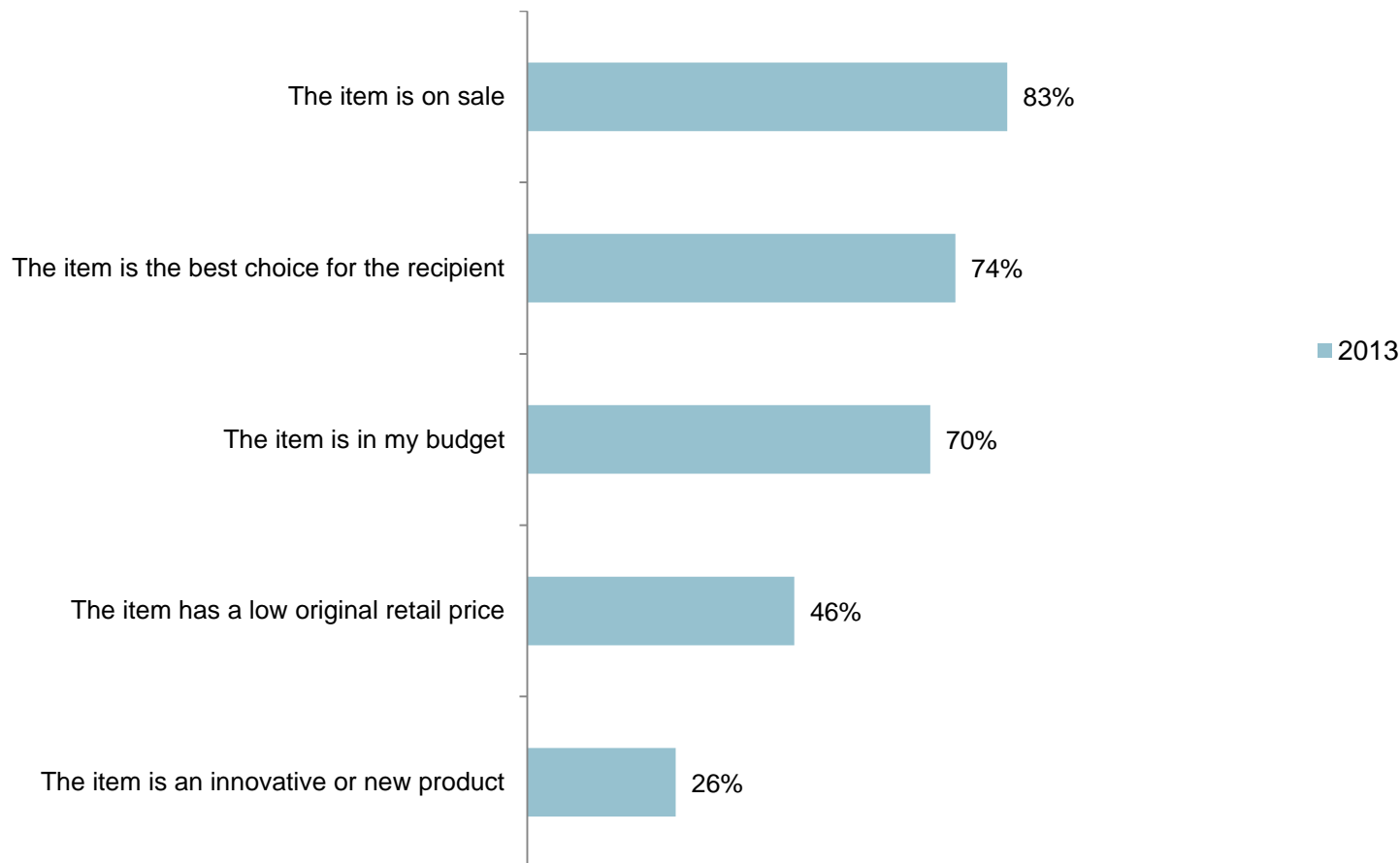




And the top three drivers of purchase decisions are sales, appropriateness of the item for the respondent and shopping budget

Please rank the following factors in terms of which will be most important to you this year when making a decision about an item to purchase.

TOP THREE CHOICE

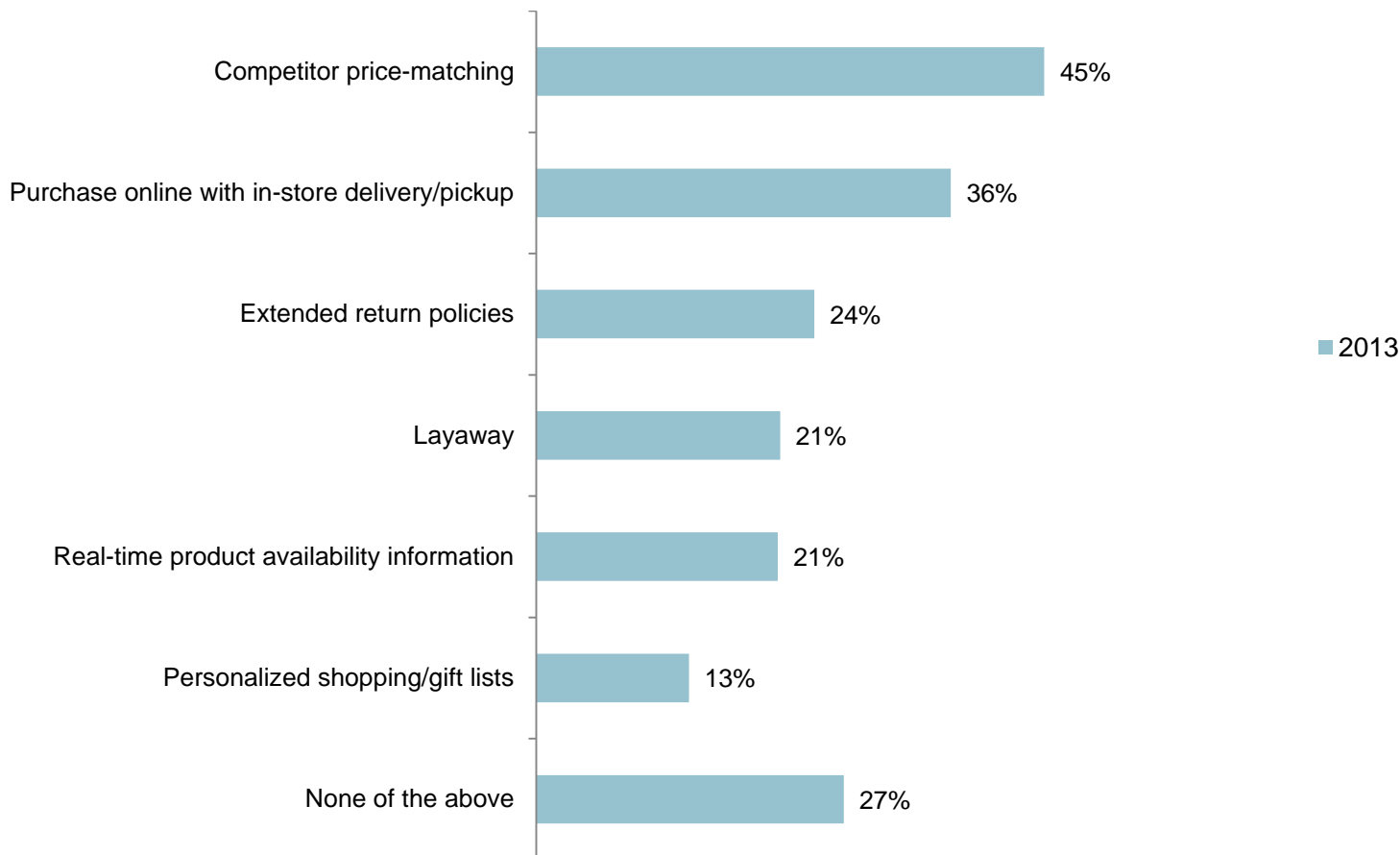




Price matching and online purchasing with store pick-up will be used by most this holiday season

Which of the following programs or benefits offered by retailers during the holiday season do you plan to take advantage of?

Check all that apply.





Executive Summary

Topline Results

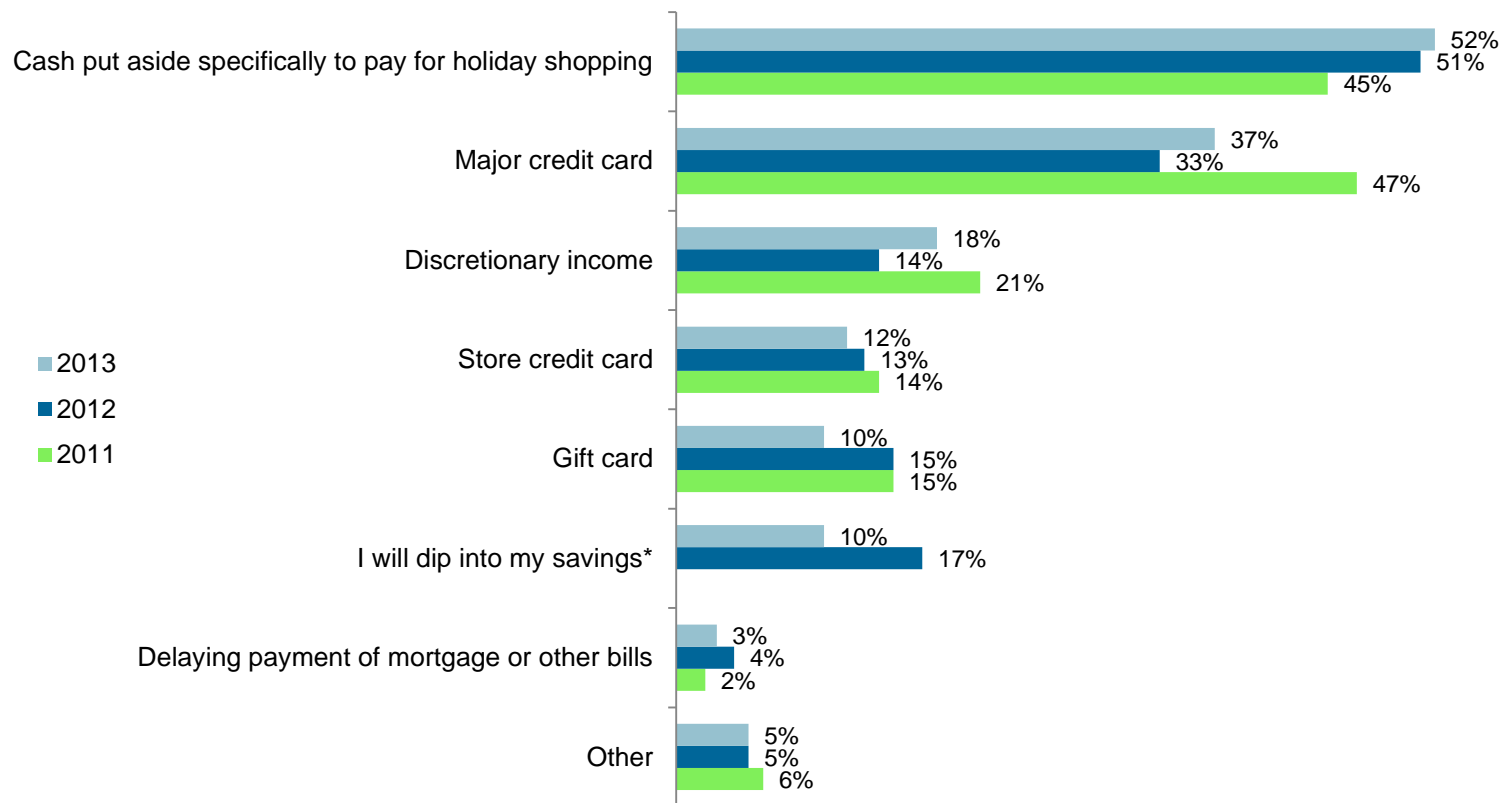
- Black Friday Shopping
- Online Shopping
- Showrooming / Webrooming
- Spending Trends and Influencers
- Cash and Credit
- Discounts
- Gift Cards

Demographics



The majority of consumers plan to pay for their holiday purchases this year using cash saved specifically for holiday shopping

How do you intend to pay for your holiday shopping purchases this year?
Check all that apply.



*Response not included 2011



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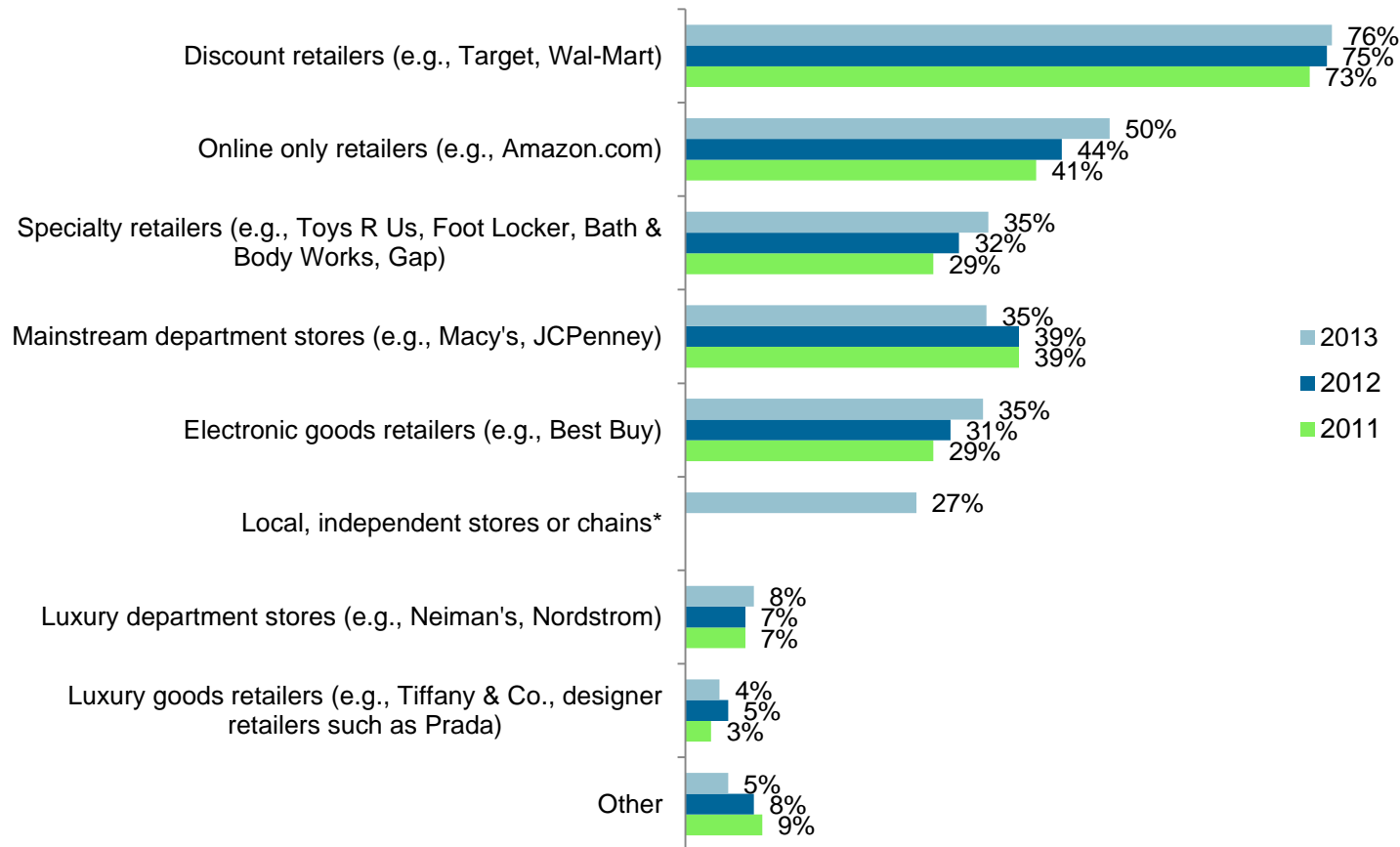
- Black Friday Shopping
- Online Shopping
- Showrooming / Webrooming
- Spending Trends and Influencers
- Cash and Credit
- Discounts
- Gift Cards

Demographics



Discount retailers will be where the overwhelming majority of consumers will holiday shop this year

In what types of stores will you be doing your holiday shopping this year?
Check all that apply.

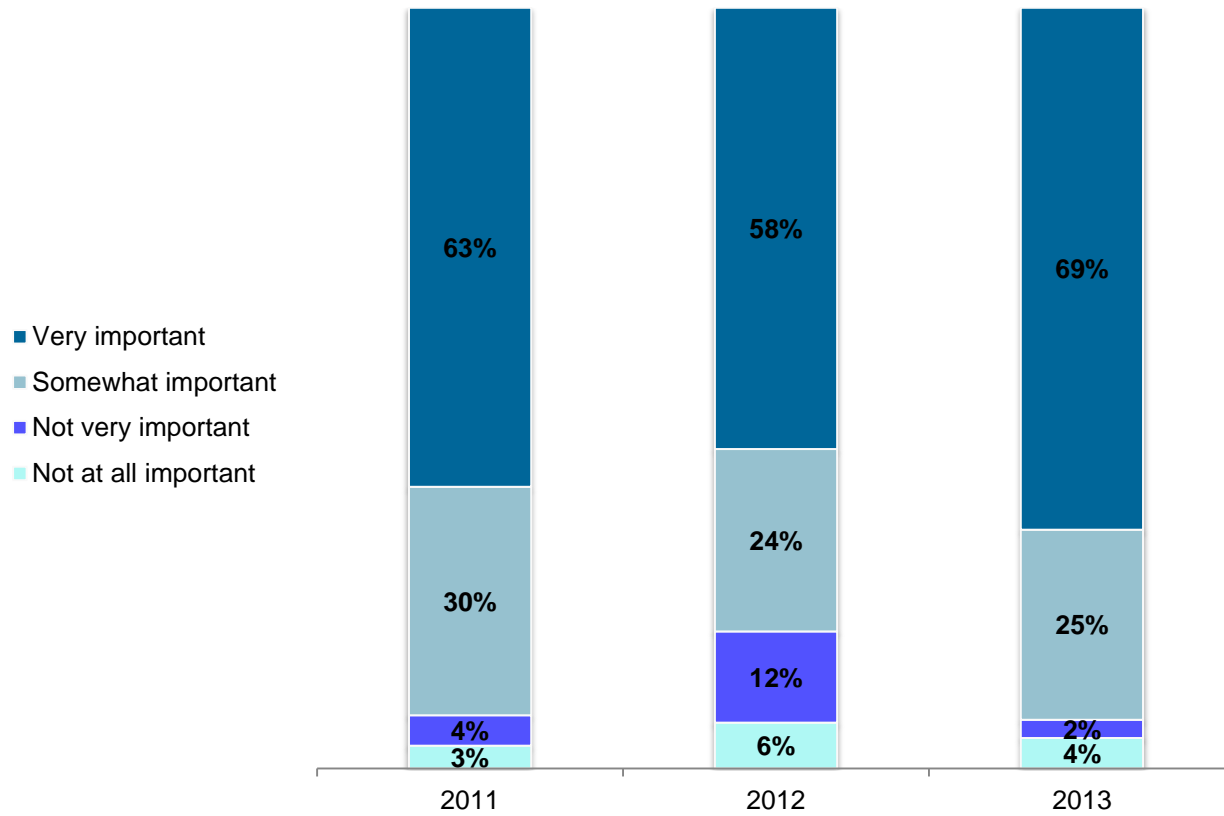


*Response not included 2011 or 2012



More than ever, sales and discounts are important to consumers

How important are discounts and sales for items you are likely to purchase this holiday season?

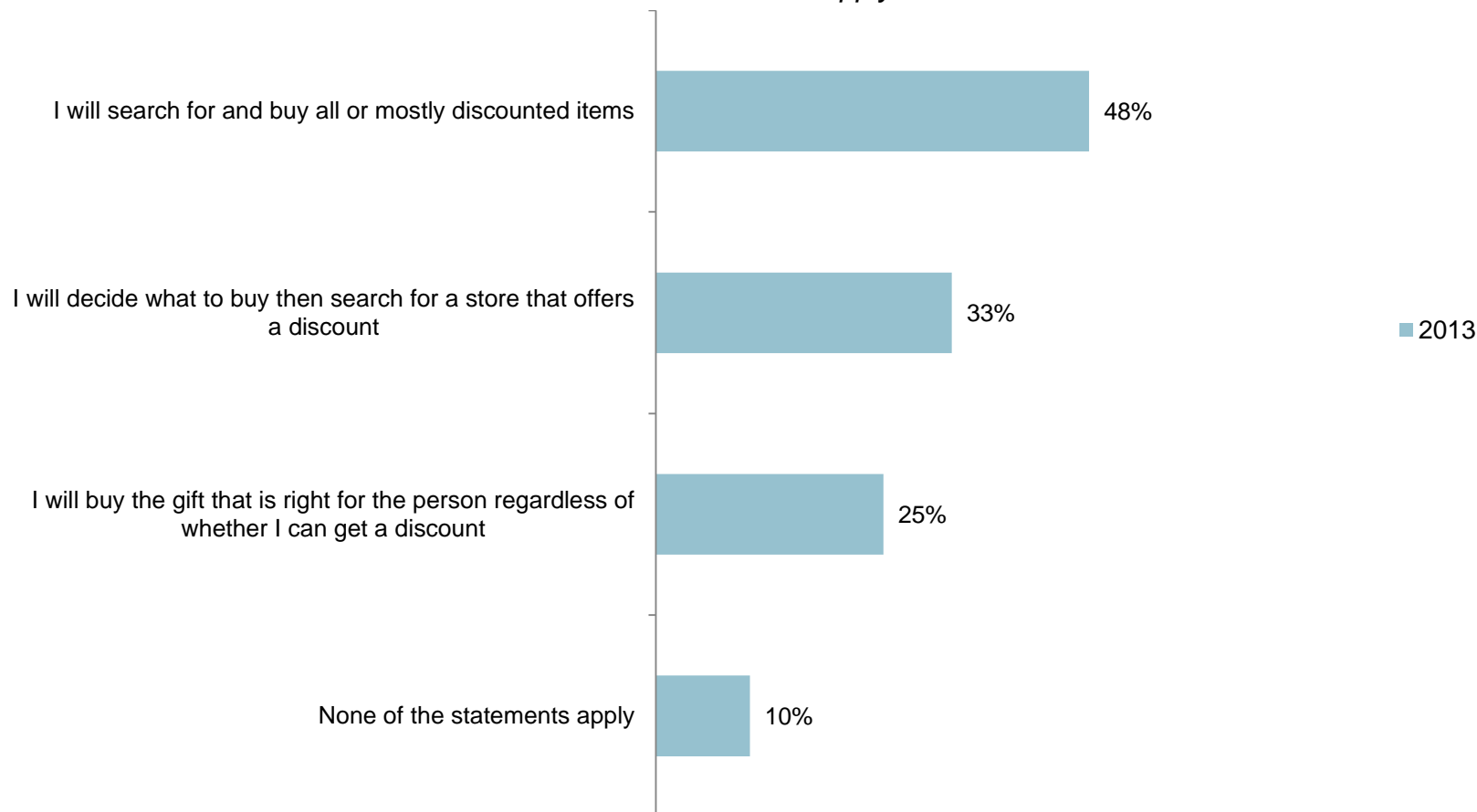




When shopping for the holidays, most will search for and buy discounted items

Which statements represent your typical shopping behavior with regard to discounts when shopping for the holidays?

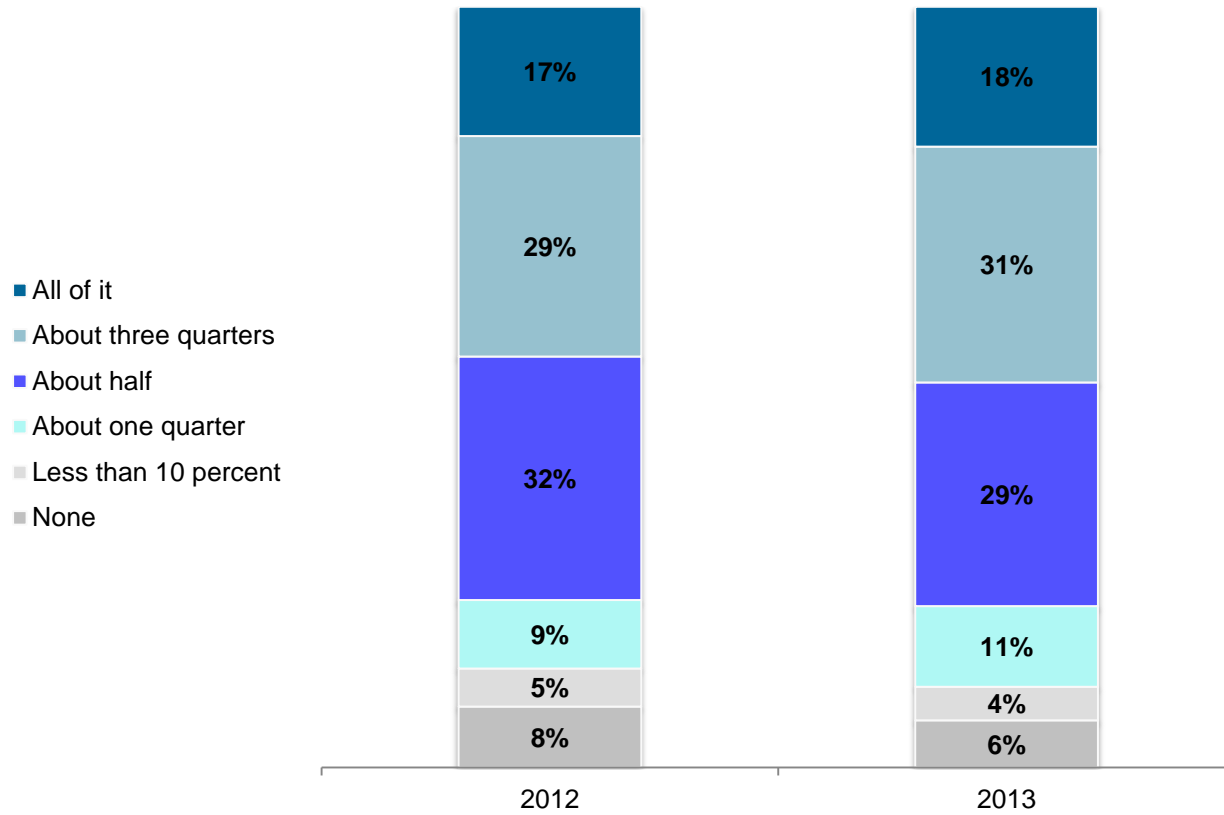
Check all that apply.





For most, 50-75% of all holiday purchases will be discounted

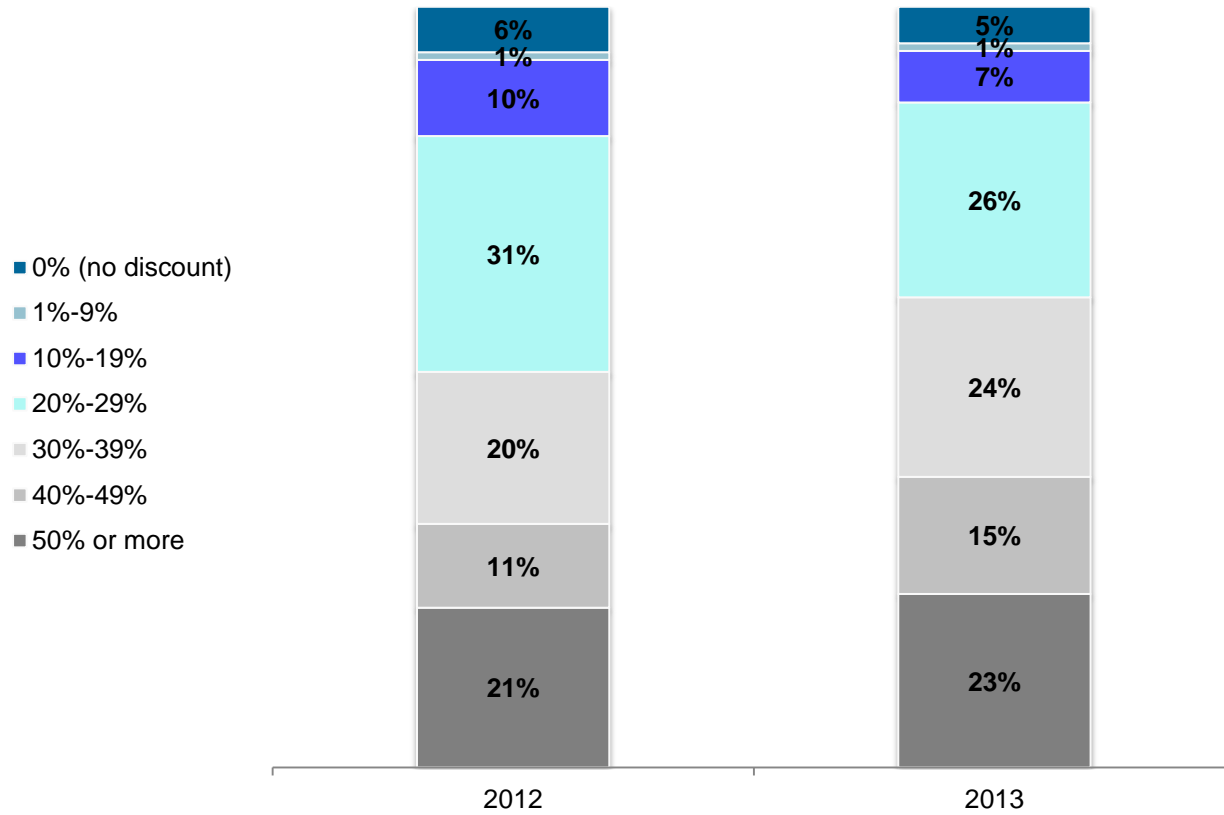
How much of your holiday shopping purchases do you estimate will be discounted?





Discounts as low as 10% are sufficient for most shoppers

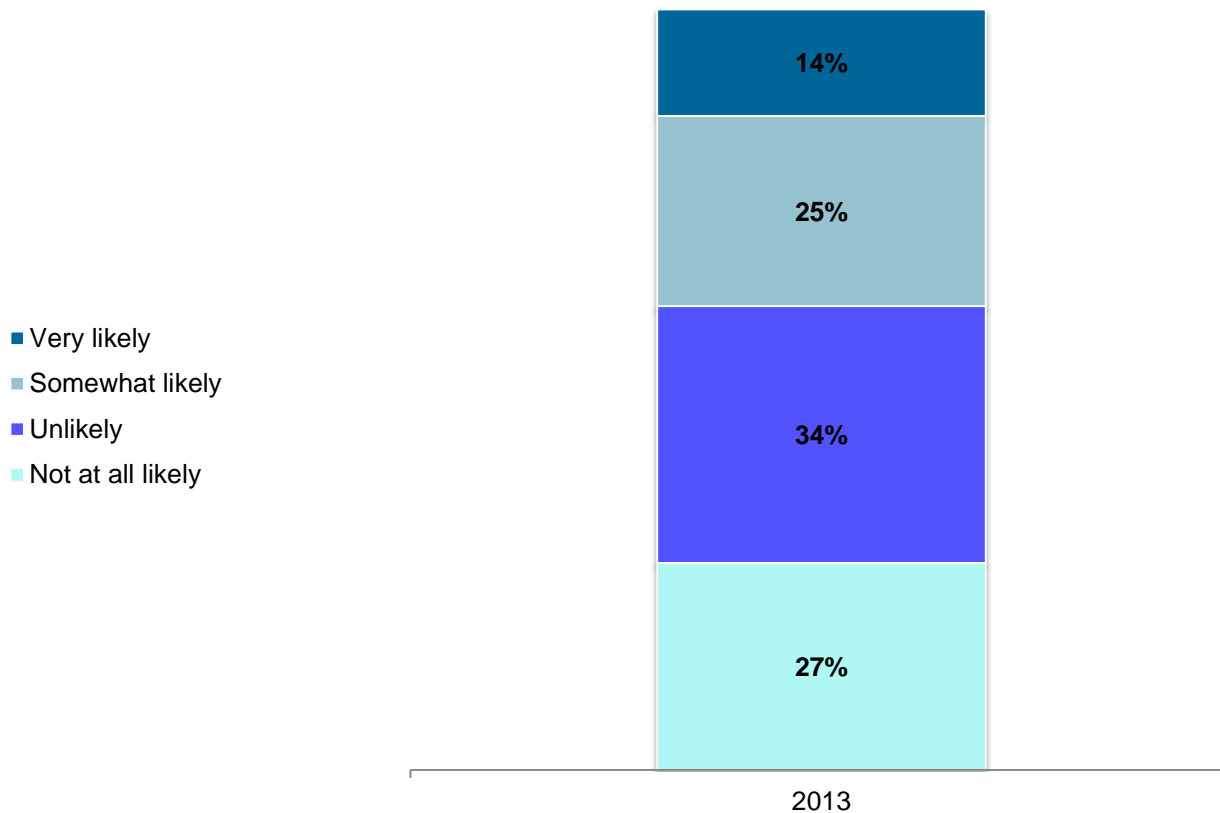
When holiday shopping, what is the typical percentage discount that persuades you to purchase an item?





Two out of five respondents will likely return and repurchase an item if it goes on sale after they buy it

How likely are you to buy a gift, return it and repurchase it before the holidays if you see it offered at a cheaper price?





Executive Summary

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- Black Friday Shopping
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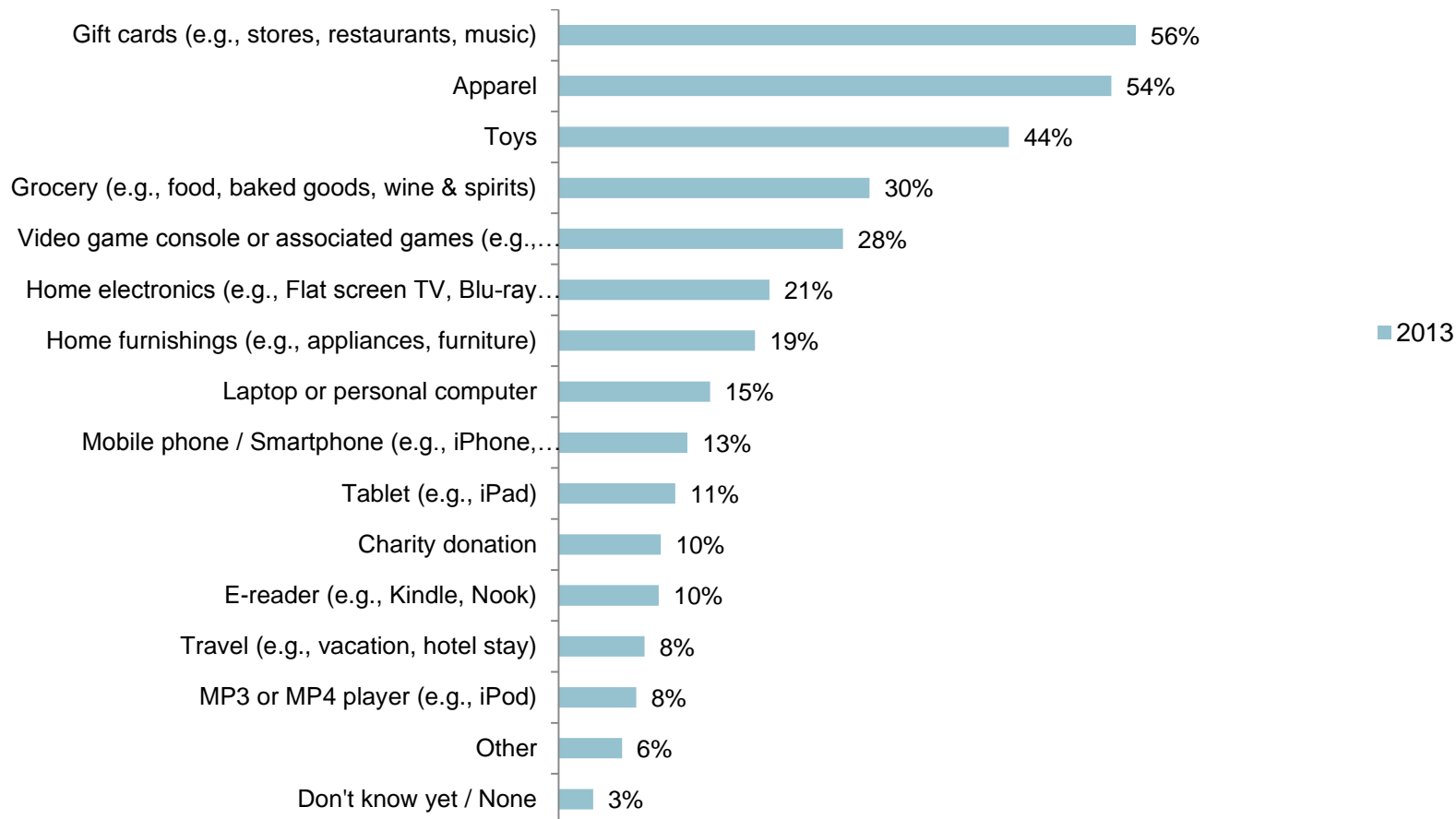
Demographics



Gift cards, apparel and to a lesser extent toys, will be on most shopping lists this year

What types of holiday gifts will be on your shopping list this year?

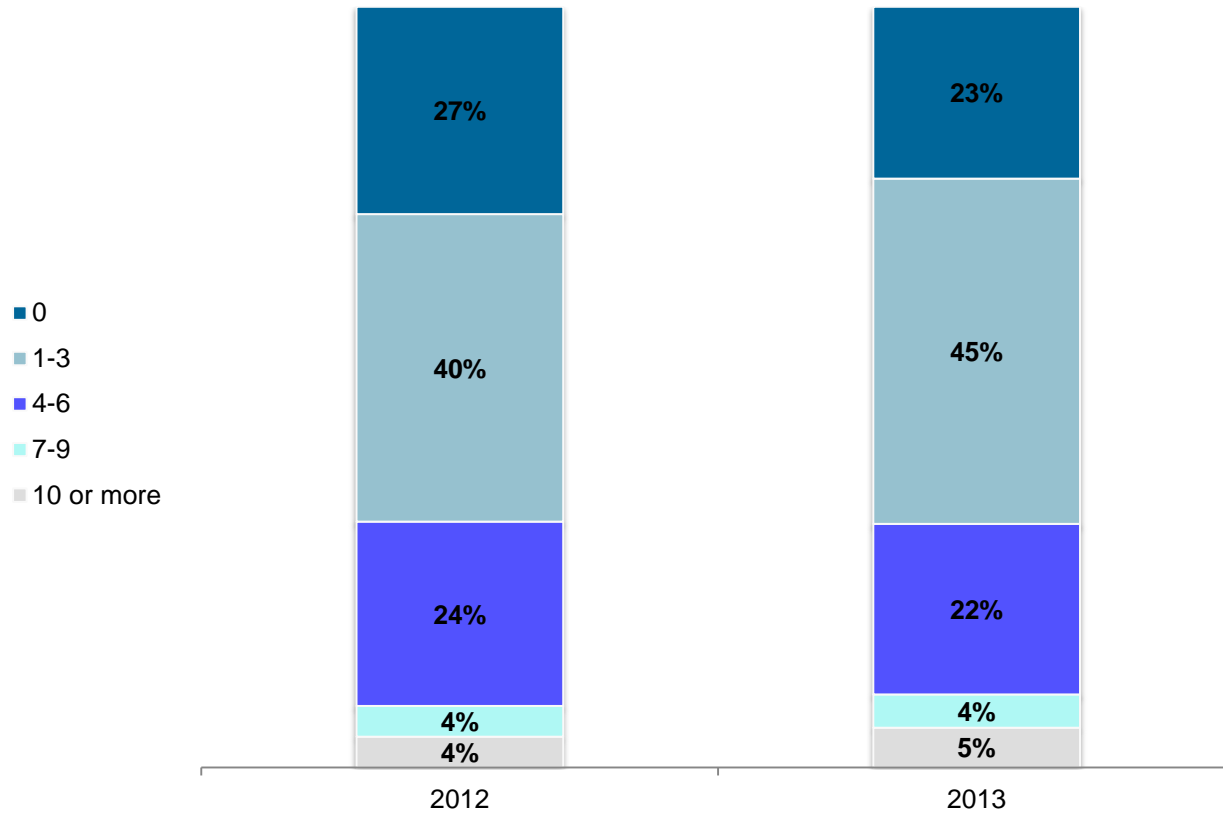
Check all that apply,





Gift card giving is on a slight rise compared to last year

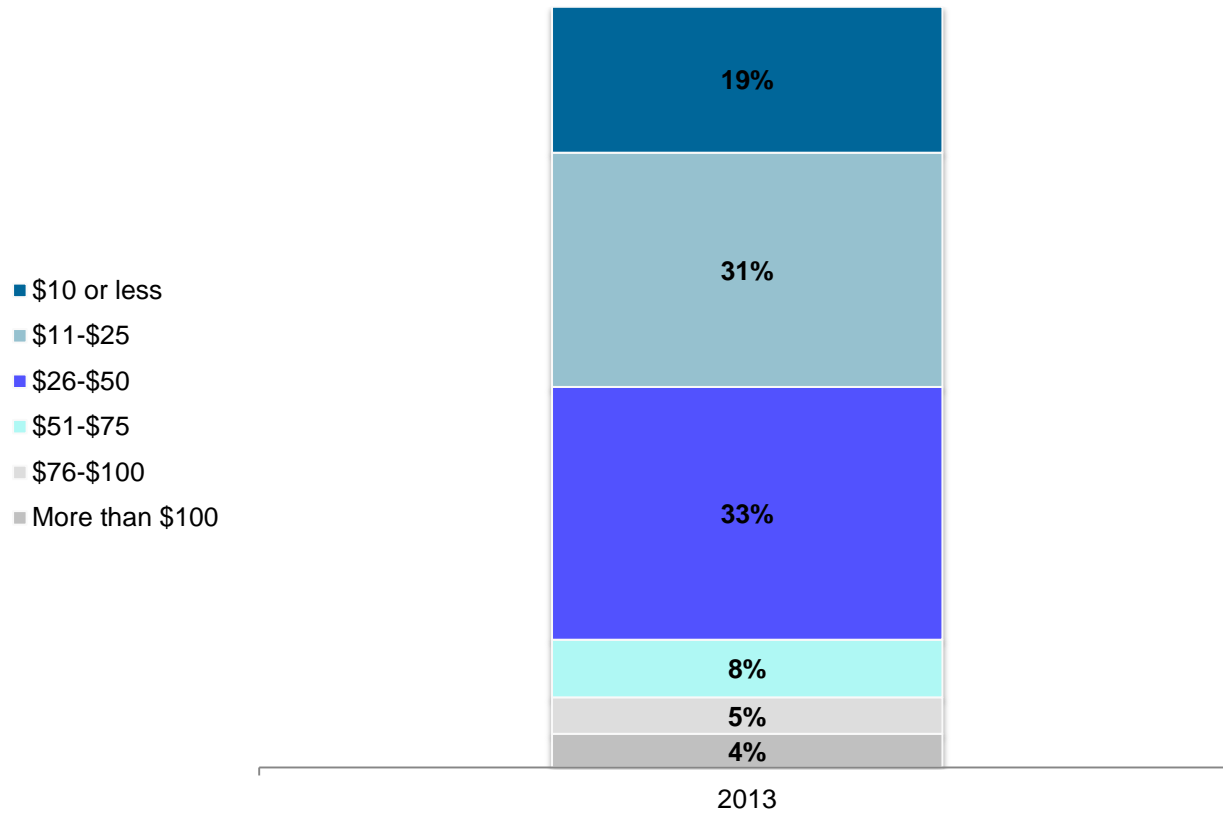
How many gift cards do you expect to give friends or relatives as a gift this holiday?





Most will spend \$50 or less on a gift card

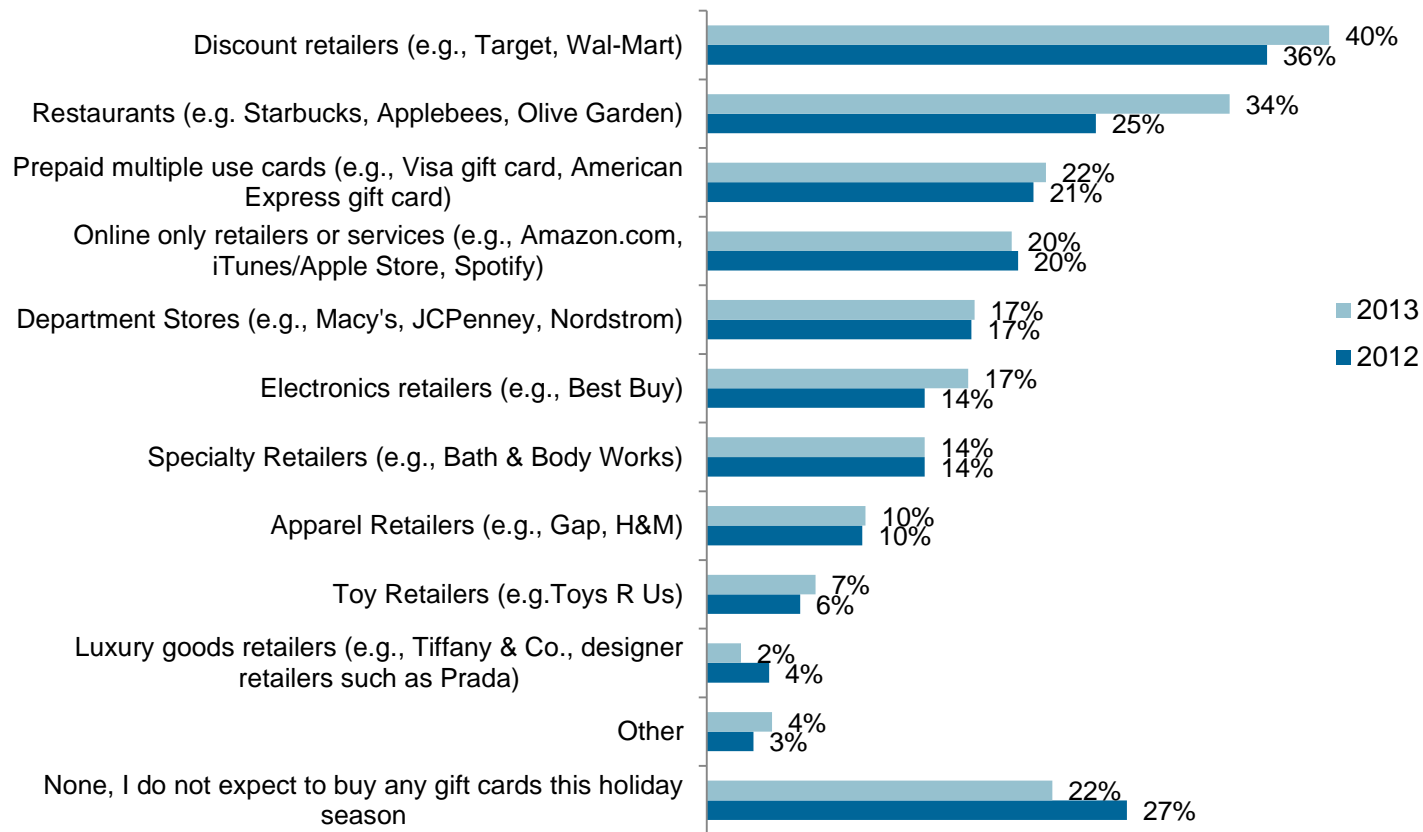
How much, on average, do you expect to spend on a gift card?





Similar to last year, most gift cards will be for discount retailers and restaurants, although the percentage of consumers has increased

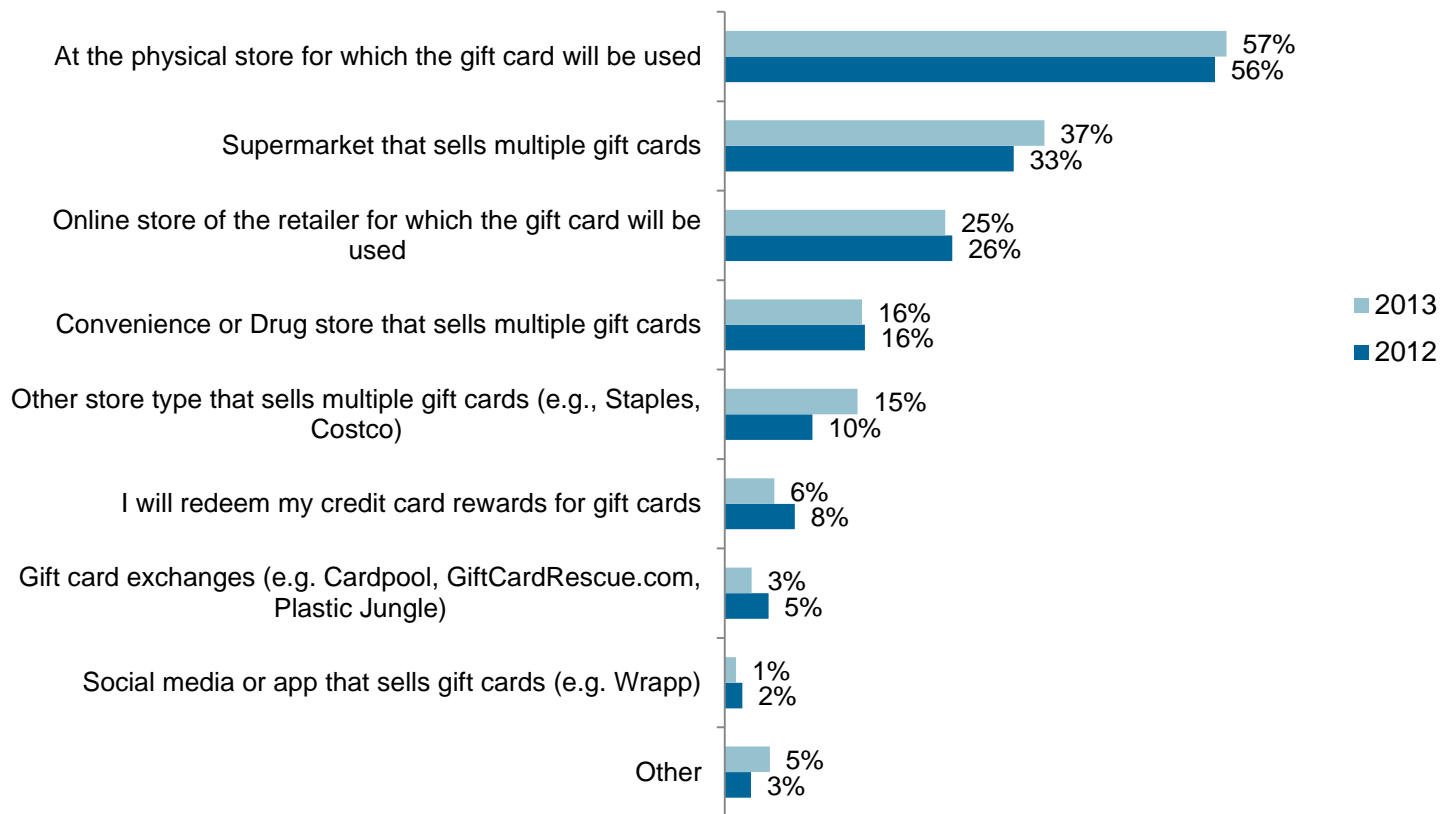
What type of gift cards do you expect to buy this holiday season?
Check all that apply.





Most will purchase their gift cards at the store where the gift card will be used

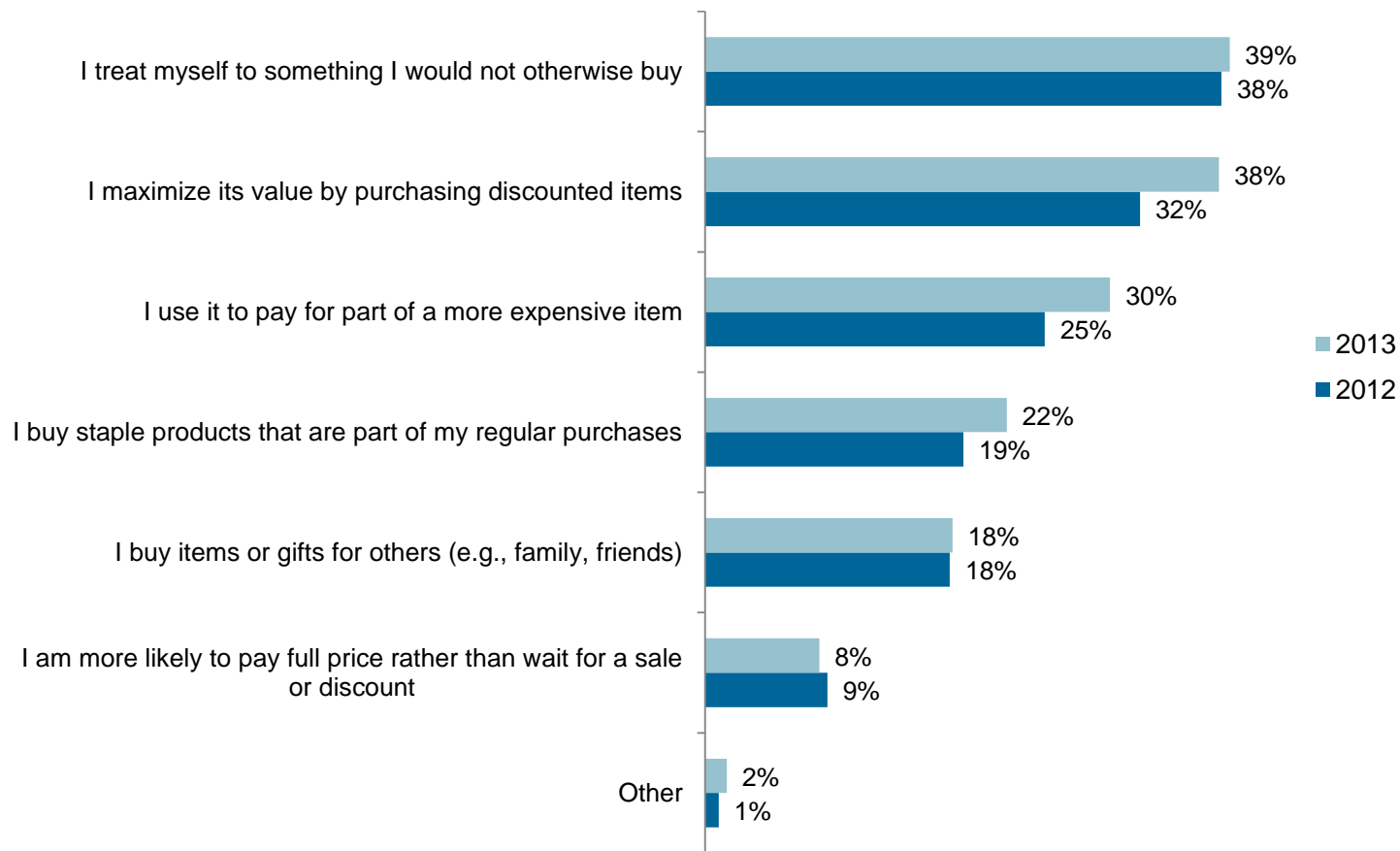
Where will you purchase your gift card(s)?
Check all that apply.



When spending gift cards, most will treat themselves to something they would not normally buy and/or purchase something discounted to maximize its value



Which of the following best describes how you typically spend gift cards?
Check all that apply.





Executive Summary

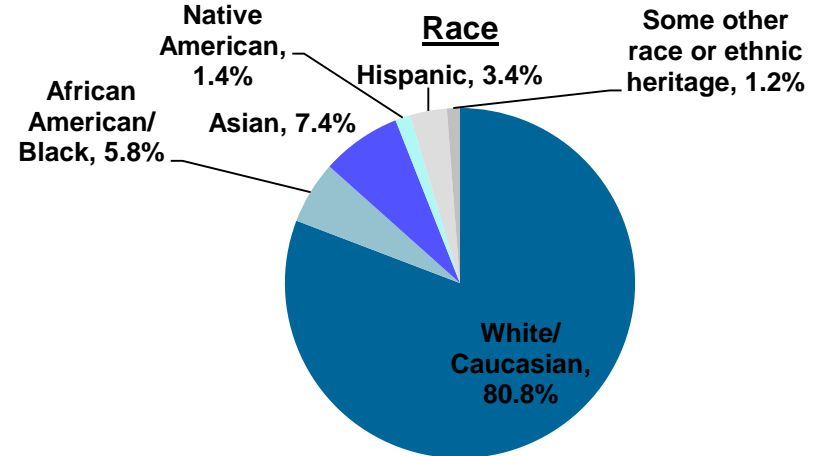
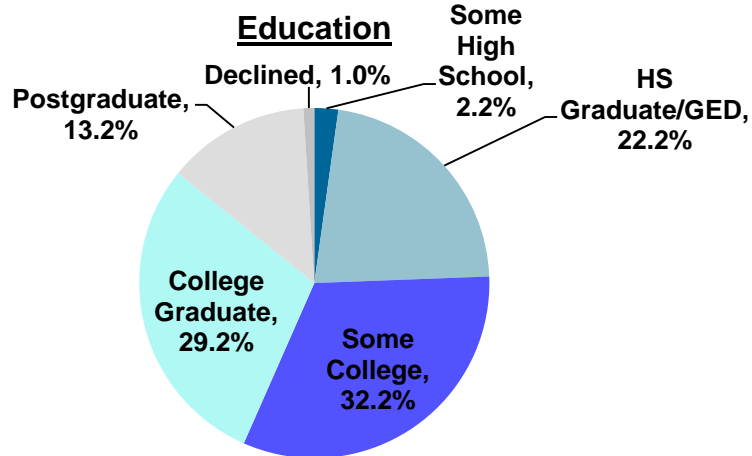
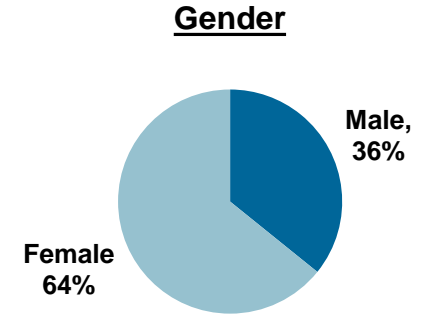
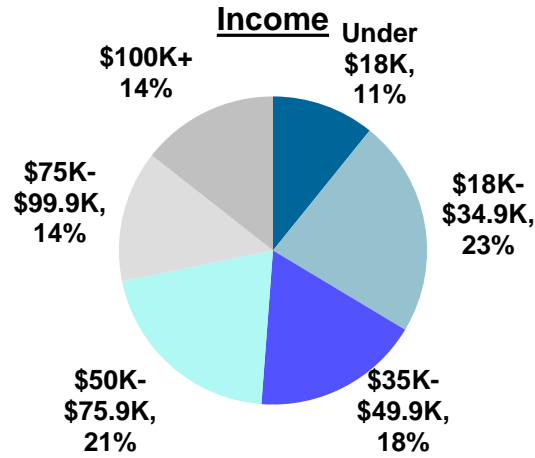
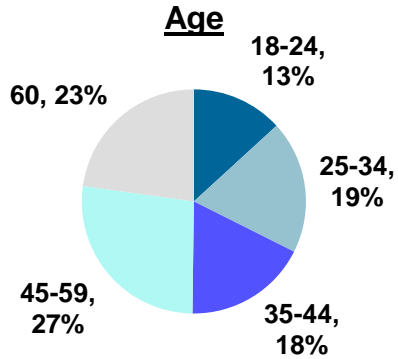
Topline Results

Demographics



Demographics

Sample Demographics





For more details

- For more details, please visit:
www.accenture.com/holidaysurvey2013