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Making spirits
bright

Deloitte's 2014
pre-Thanksgiving
shopping survey

November 2014



About the survey

The survey was commissioned by Deloitte and conducted online by an independent research company on Monday, November 17, 2014. The survey polled a sample of 1,000 consumers and has a margin of error for the entire sample of plus or minus three percentage points.

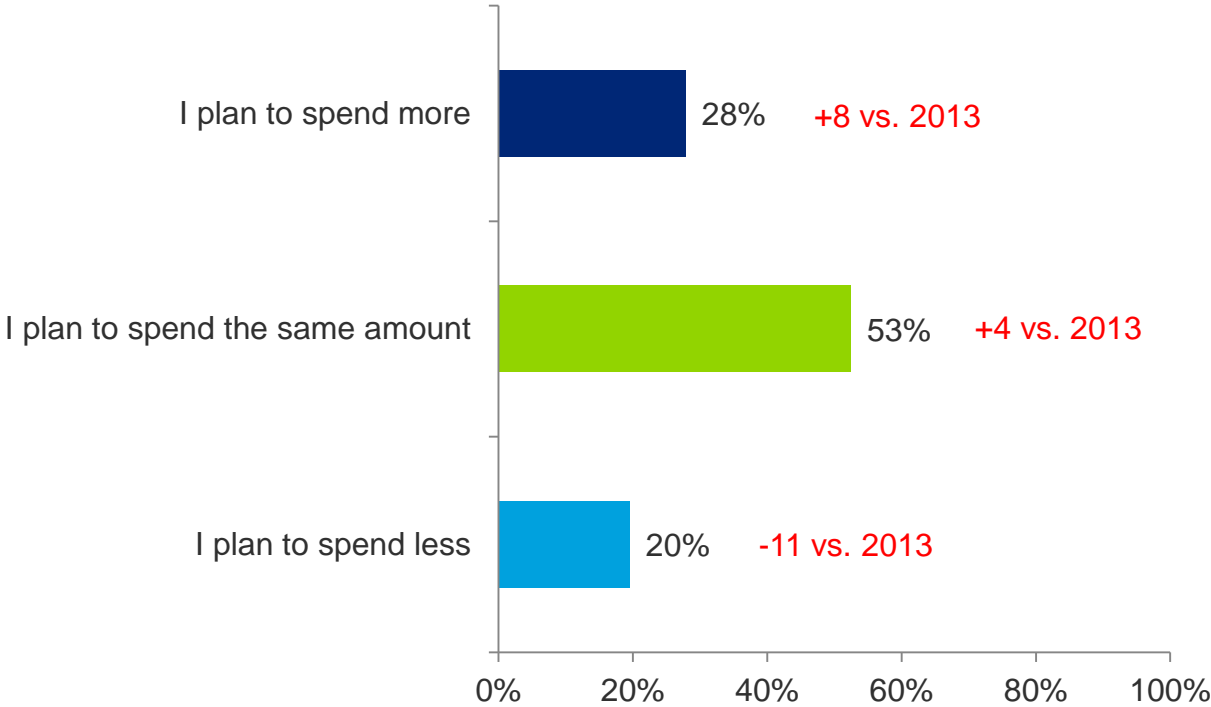
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Executive summary

- 81% of respondents plan to spend more or the same amount on the holidays as compared to just a month or two ago (up from 69% last year)
- 54% of consumers are expected to shop over the Thanksgiving weekend* (53% in 2013)
- Respondents plan to spend an average of \$295 over the Thanksgiving weekend (an increase of \$9 from 2013)
- Consistent with 2013, only 13% of respondents expect to shop in stores on Thanksgiving Day, yet they plan to spend 16% more than last year
- More in-store shopping is expected on Black Friday and Saturday compared to the other days of the Thanksgiving weekend
- More online shopping is expected on Black Friday and Cyber Monday compared to the other days of the Thanksgiving weekend
- Among those shopping in stores on Black Friday, a significant majority (85%) said they will be doing so to take advantage of sales

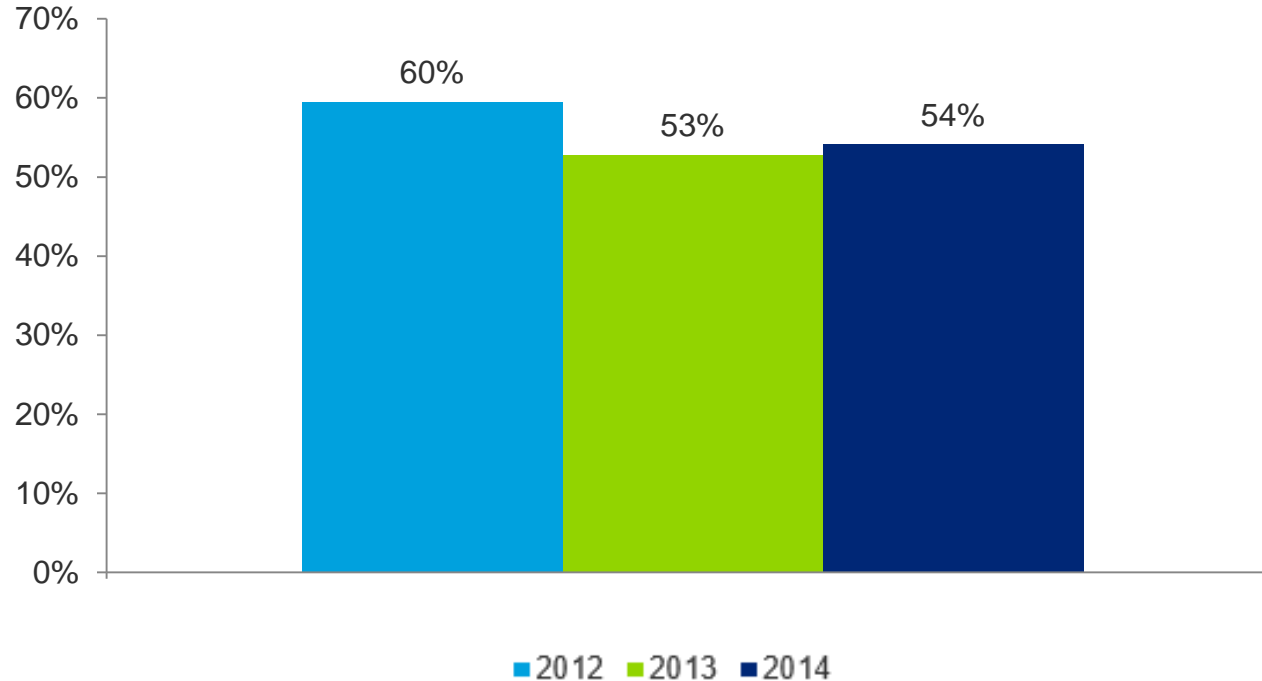
81% of respondents expect to spend more or the same on the holidays as compared to just a month or two ago (up from 69% last year)

How do your holiday spending plans compare to just a month or two ago?



54% plan to shop in stores or online over the Thanksgiving weekend – down from 60% in 2012

Do you expect to do any shopping for the December holiday(s) either online or in stores over the Thanksgiving period - including Thanksgiving Thursday through the following Monday?



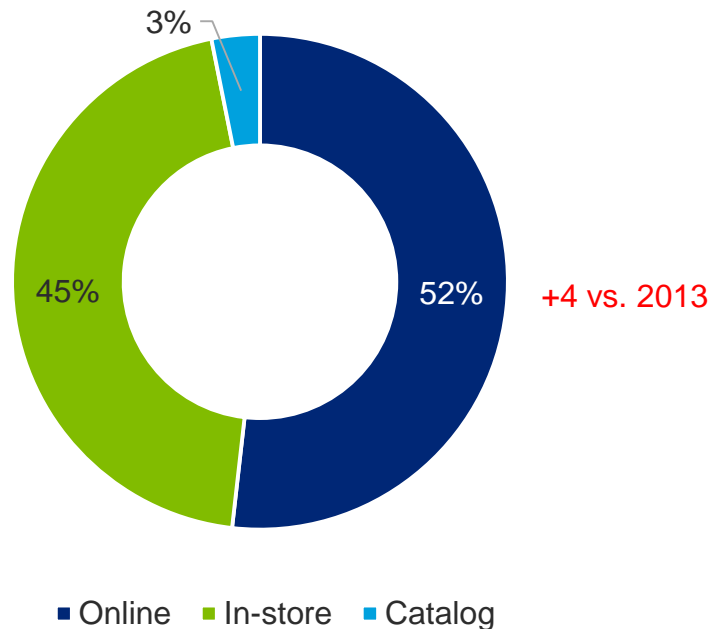
Respondents' planned spending behavior over the Thanksgiving weekend

	Mean			
	2011	2012	2013	2014
How much do you plan to spend on shopping from Thanksgiving Thursday through the following Monday?	\$224	\$286	\$286	\$295
What percentage of your holiday gift spending have you completed to date for the December holidays?	23%	19%	18%	18%
Considering the holiday gifts that you have already purchased, what percentage was bought "on sale" or with a coupon?	26%	23%	25%	23%

Among those shopping over the Thanksgiving weekend, the majority (52%) of respondents are expected to spend online

What percentage of your spending during the Thanksgiving weekend is expected to be through the following shopping channels?

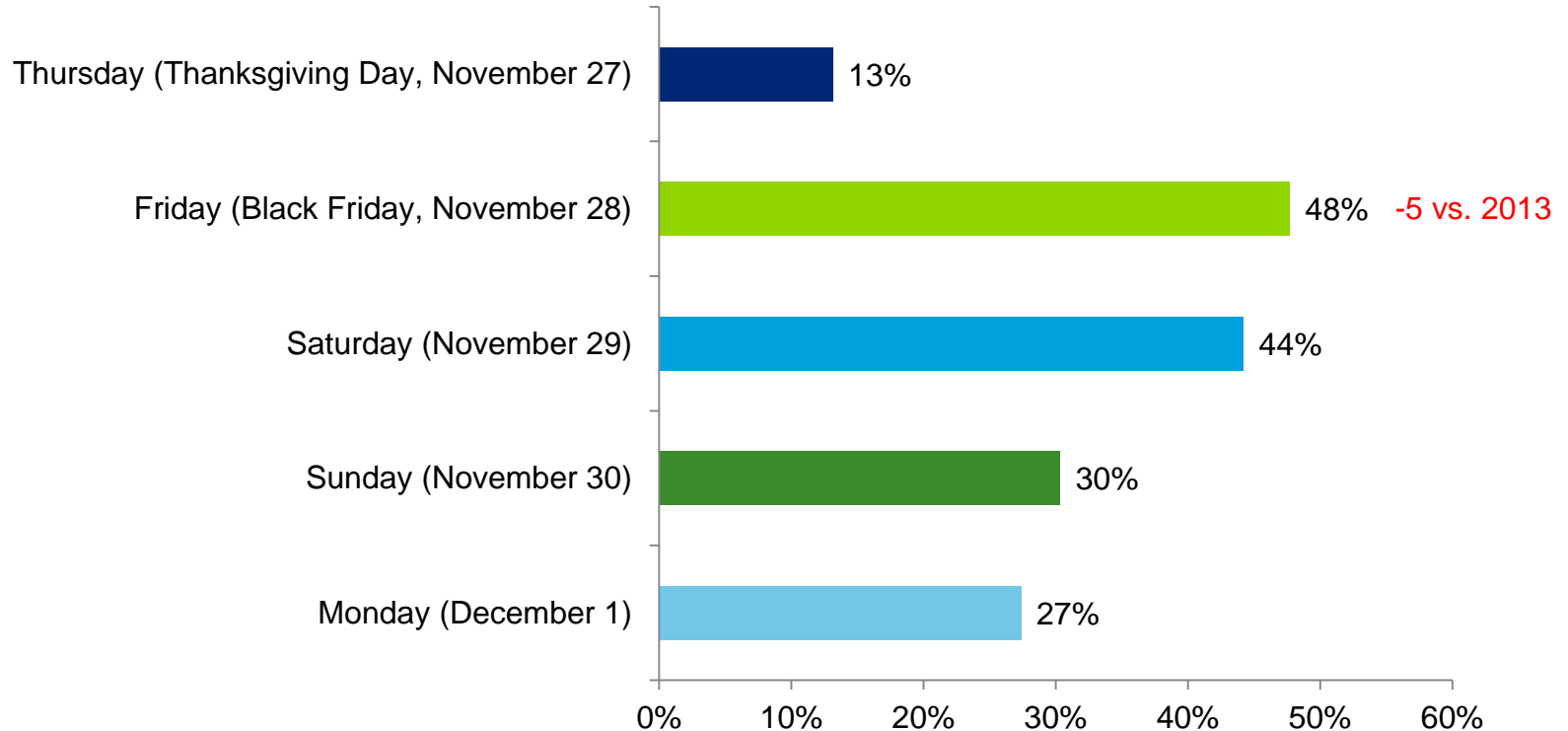
(Base: 54% shopping over the Thanksgiving weekend)



Respondents will spend an average of \$86 in stores on Thanksgiving Day (vs. \$74 in 2013)

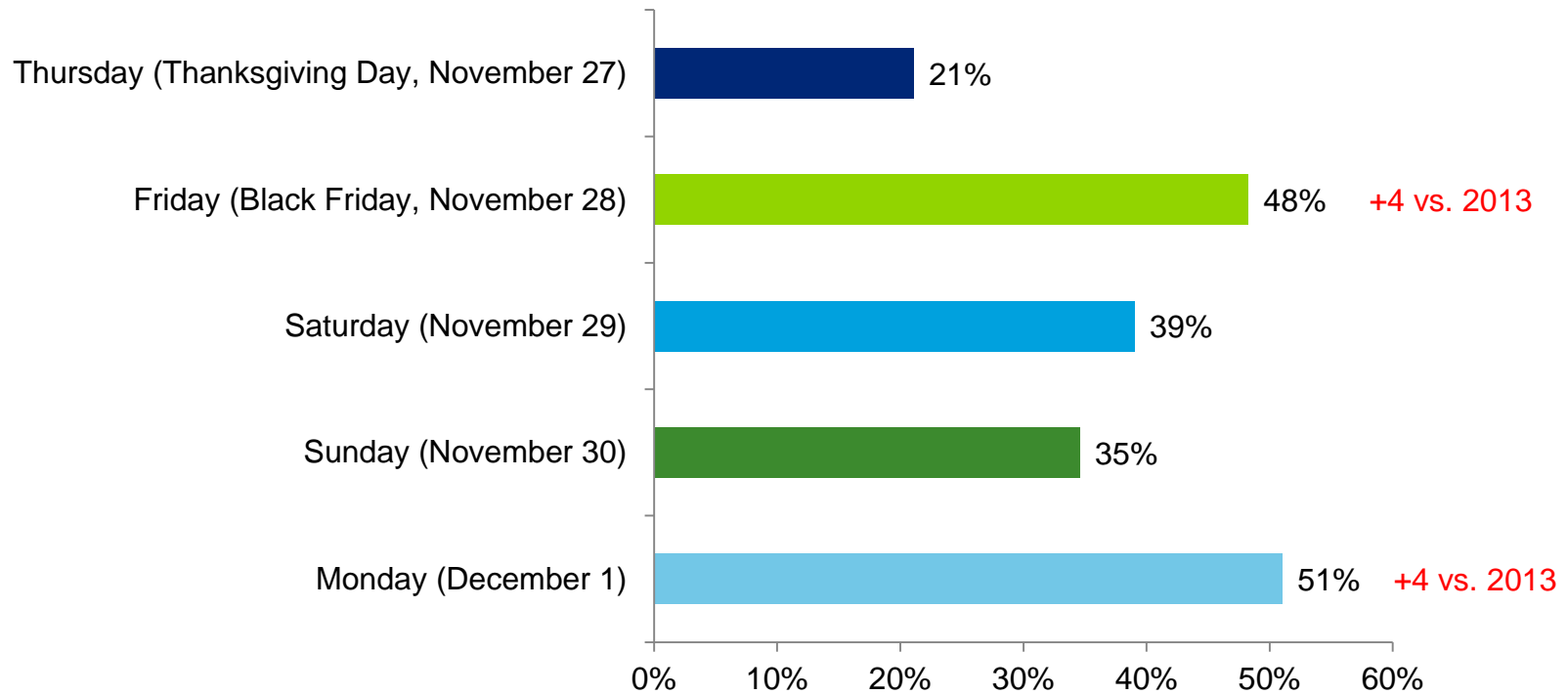
Black Friday and Saturday are expected to be the most popular days for in-store shopping over the holiday weekend

Of the 54% of respondents expecting to shop over the Thanksgiving weekend –
On what days do you expect to shop in stores?



Black Friday and Cyber Monday are expected to be the most popular days for online shopping over the holiday weekend

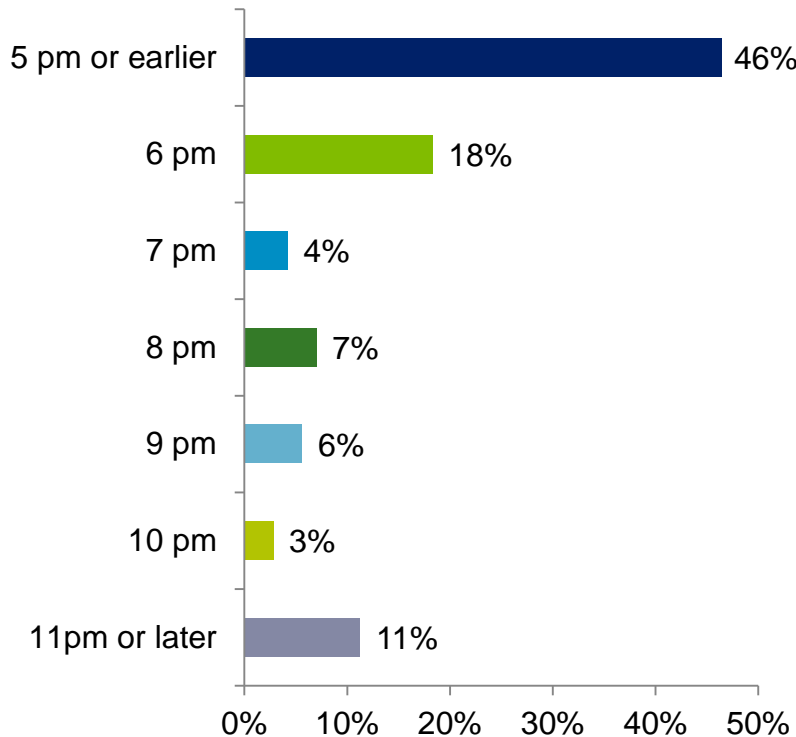
Of the 54% of respondents expecting to shop over the Thanksgiving weekend –
On what days do you expect to shop online?



Respondents' expected shopping itinerary on Thanksgiving Day and Black Friday

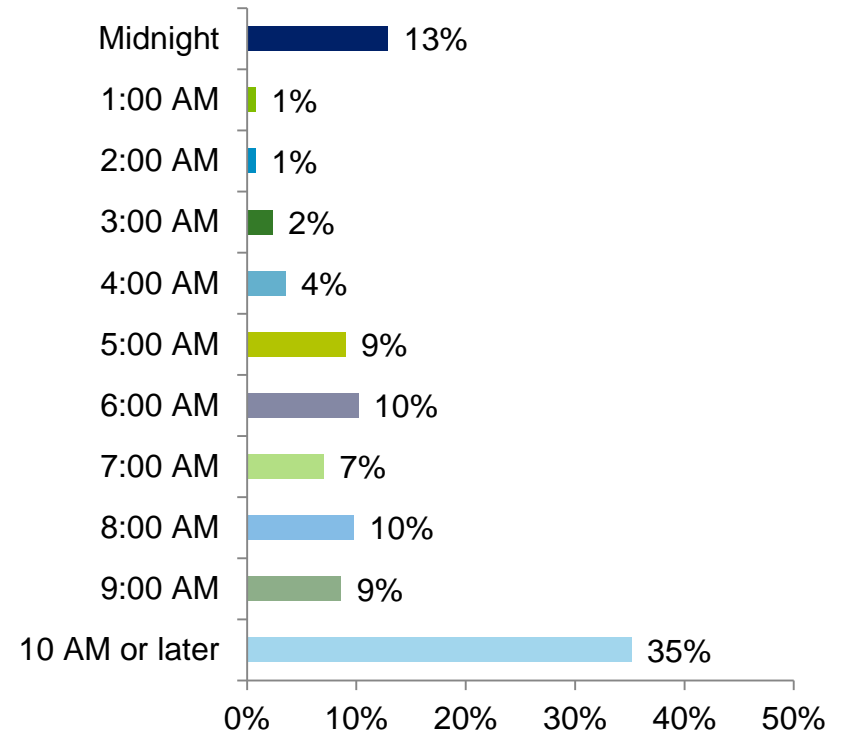
What time do you expect to go to the store on **Thanksgiving Day**?

(Base: 13% shopping in stores on Thanksgiving Day)



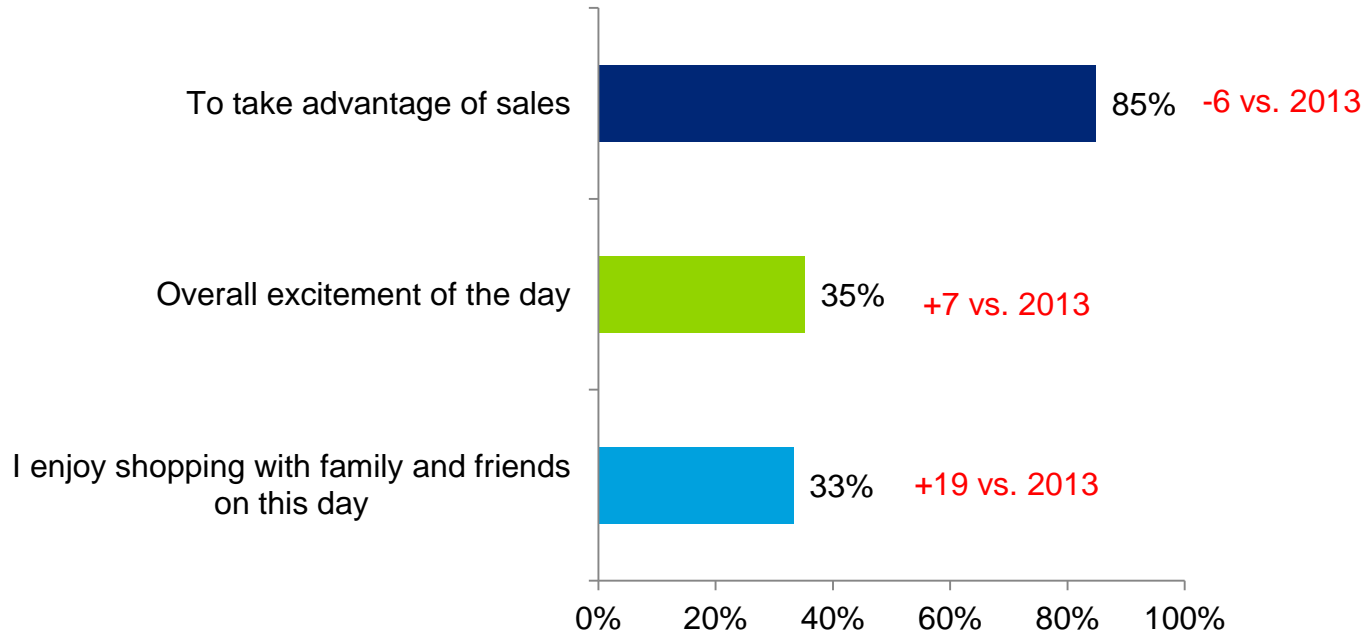
What time do you expect to go to the store on the **Friday** after Thanksgiving?

(Base: 48% shopping in stores on Black Friday)



Among those shopping in stores on Black Friday, a significant majority (85%) said they will be doing so to take advantage of sales

Top three reasons respondents will you be shopping in stores on Black Friday
(Base: 48% shopping in stores on Black Friday)

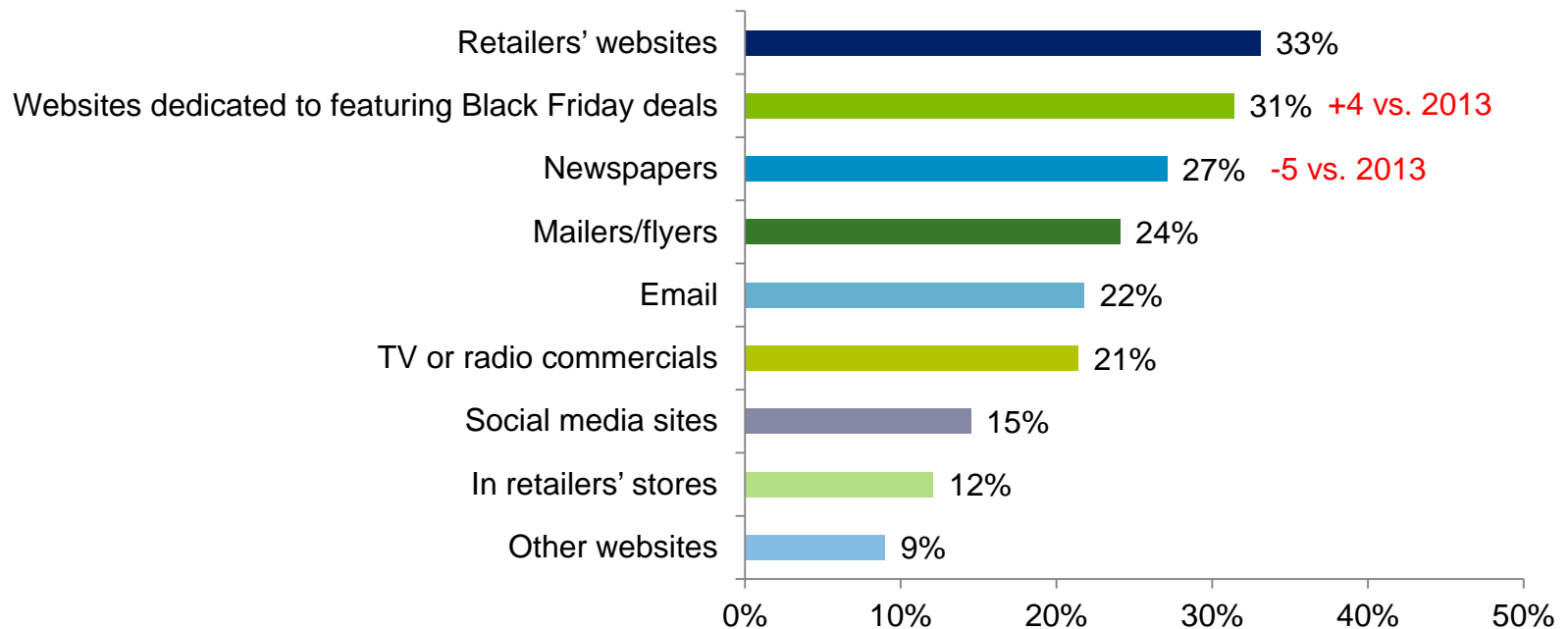


69% of consumers expect to shop with other family members and friends in stores over the Thanksgiving weekend

Retailers' websites are the top source where respondents expect to obtain Black Friday sales information

Where do you expect to obtain information about Black Friday sales?

(Base: All respondents)



49% of consumers expect to spend up to 2 hours researching Black Friday deals

Four in 10 respondents plan to complete their online holiday purchases early to avoid shipping delays

	2014	2013	Change
I won't be motivated to shop on Thanksgiving Day this year because it's an important holiday to spend with family and friends	67%	-	-
I plan to avoid shopping in stores during the Thanksgiving weekend to avoid crowds	59%	59%	-
I don't rely on shopping on Black Friday or Cyber Monday as much as I used to for holiday shopping	41%	40%	+1%
I plan to complete my online holiday purchases early this year to avoid shipping delays	40%	-	-
I plan to research online before shopping in stores on the Thanksgiving weekend	37%	35%	+2%
I plan to shop Saturday (the day after Black Friday) to support local retail businesses	33%	-	-
Black Friday deals are not as good as they used to be	26%	21%	+5%
I'll likely purchase earlier in the holiday season because of concerns that merchandise may run out	22%	19%	+3%



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