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2014 Accenture Holiday Shopping Survey - U.S. Results



Executive Summary

Topline Results

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

Demographics & Methodology





Executive Summary

Consumers have more discretionary income and greater job security, resulting in increased holiday spending; very focused on discounts

- One-quarter (25%) of US consumers plans to spend more on holiday shopping this year, compared to 20% in 2013
- Spending on holiday gifts is expected to average \$718
- Of those consumers planning to spend more this year, 28% said they have more discretionary income and 22% noted that they have greater job security, up from 15% in 2013
- Nearly half (47%) of consumers plan to spend \$250 or more compared to 40% in 2013
- Of the 19% of consumers who plan to spend less this year, 41% said they will reduce the amount they spend by less than \$100
- Even though they intend to spend more, holiday shoppers remain keenly focused on discounts and sales
- Nearly all respondents (96% versus 94% in 2013) said that discounts will be important to their purchasing decisions, and more than one in four (29%) said that it would take a discount of 50% or more to persuade them to make a purchase



Executive Summary

Consumer enthusiasm for Black Friday shopping has reached its highest level in eight years

- Two-thirds of respondents (66%) said they are likely to shop on Black Friday, compared to 55% who planned to do so in 2013 and 44% who said the same in 2007
- Up from 32% in 2013, 37% plan to shop online on Black Friday using a desktop, mobile device or tablet
- Plans to shop on Thanksgiving Day and evening rose to 45% from 38% in 2013
- Of those consumers planning to shop on the holiday, 47% said that they will be shopping in a physical store between 6 PM Thanksgiving Day and 5 AM on Black Friday

Consumers' interest in a seamless holiday shopping experience across all shopping channels is growing

- A growing number of consumers (71%) plan to participate in “webrooming” – browsing online and then going into a store to make their purchase
- Checking online to determine if a product is in stock was selected by respondents as their top reason for webrooming
- Nearly three-quarters (68%) of consumers say they are likely to participate in “showrooming” – going into a physical store to see a product and then searching online for a better price and making their purchase online, up from 63% in 2013
- More than half (57%) of respondents said they would likely buy items that were not part of their original purchase when they go into a store to pick up merchandise they purchased online and had shipped to the store or use an in-store pickup option



Executive Summary

There is a growing use and influence of mobile and social channels this holiday shopping season

- Advanced technologies will play a more prominent role in holiday shopping this year
- More than half of consumers (63%) that they will use a laptop or home computer to make purchases or assist in their holiday shopping this season (up 16 percentage points from last year), and 24% plan to use a smartphone, up from 18% last year
- Up from 11% in 2013 and 8% in 2012, 13% of respondents said they intend to use social networking sites to assist them in their holiday shopping
- When doing their in-store shopping this holiday season, many consumers say they would be willing to use new digital tools
- More than half of respondents (66%) said they would use or are willing to try out a mobile tool that scans products as they're placed in a shopping cart and keeps a running tab of the total amount spent
- More than three-quarters (76%) of respondents said they would definitely use or would be willing to try mobile services that provide them with real-time promotions and offers as they shopped in-store if those services were offered



Executive Summary

Consumers are planning ahead and getting a jump start on holiday gift shopping

- Nearly one-fifth of survey respondents (19%) said they had already spent between \$100 and \$500 on holiday gift purchases by mid-September of this year
- Over the past three years, the number of consumers who believe the best discounts of the season can be found before Thanksgiving and Black Friday has been rising – to 18% in 2014, compared to 14% in 2013 and 12% in 2012
- Many consumers are planning ahead to pay for their holiday shopping
- More than half (57%) of respondents say they will pay for their holiday purchases with cash they've put aside, a small increase from 52% last year

The percentage of consumers giving gift cards is increasing

- More than half (57%) of consumers plan to purchase gift cards (the top item on consumers' shopping lists) this year
- Up from 10% in 2013, 17% of shoppers will use gift cards to do their holiday shopping
- More than half (54%) of respondents plan to spend between \$11 and \$50 on a gift card
- Gift cards for restaurants, discount retailers and prepaid, multiuse cards are the most popular



Executive Summary

Most consumers will do their holiday shopping at discount retailers this year; gift cards, apparel and toys top the gift list

- Discount retailers continue to be the top destination for shoppers this holiday season (71%)
- More than half (58%) of respondents said they will shop at online-only retailers, compared to 50% in 2013 and 44% in 2012
- Nearly half (47%) of consumers plan to buy gifts at department stores this year, up 12 percentage points from 2013
- Gift cards (57%), apparel (56%) and toys (42%) top consumers' holiday shopping lists
- In electronics, 13% of respondents plan to buy wearable technology such as fitness bands, 24% plan to buy home electronics such as a TV or Blu-ray player, 14% plan to buy smartphones and 13% plan to buy tablets



Executive Summary

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- Thanksgiving and Black Friday Shopping
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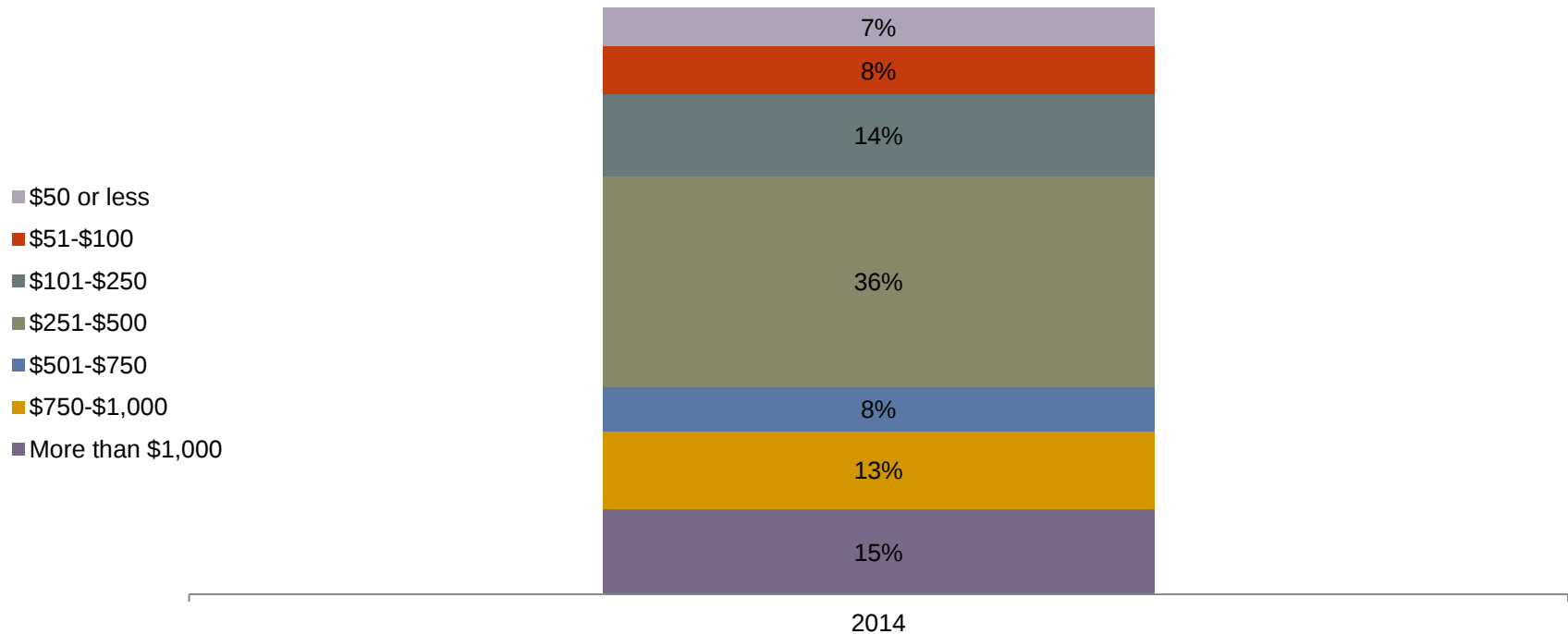
Demographics & Methodology





Shoppers expect to spend on average \$718 on holiday shopping.

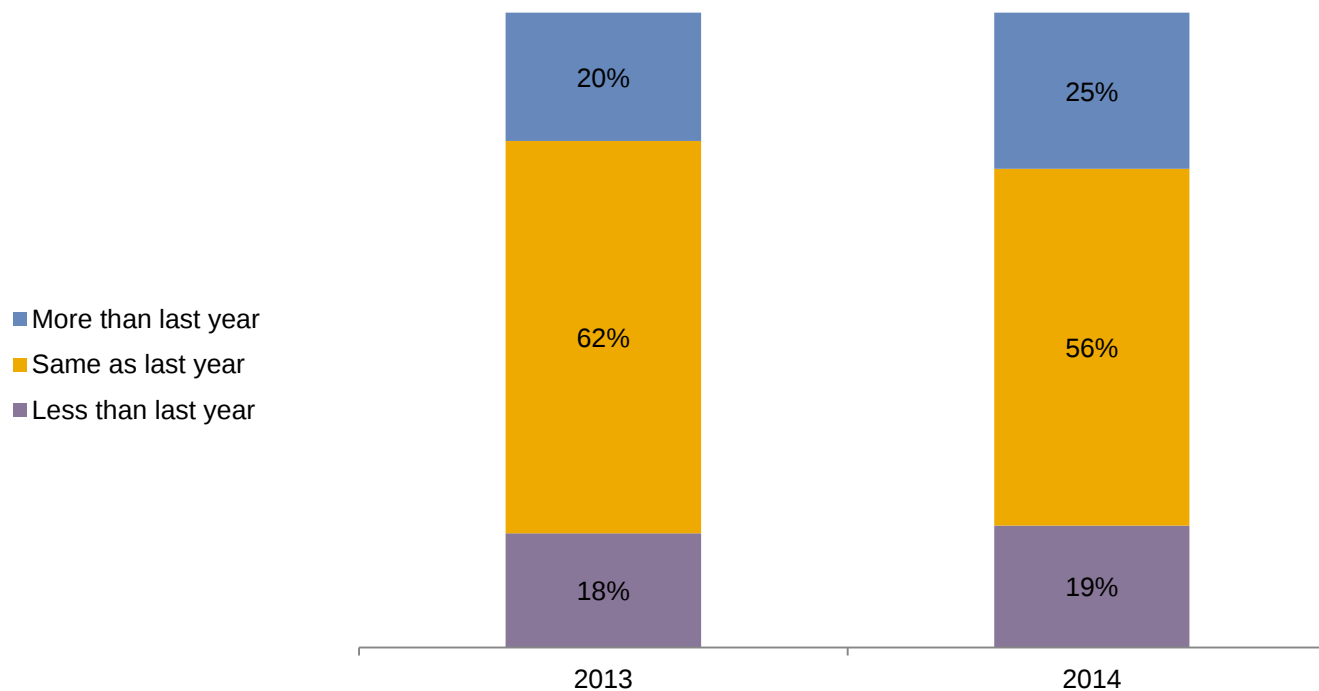
How much do you expect to spend in total on holiday shopping this year?



25% of consumers are planning to spend more than last year this holiday season.



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

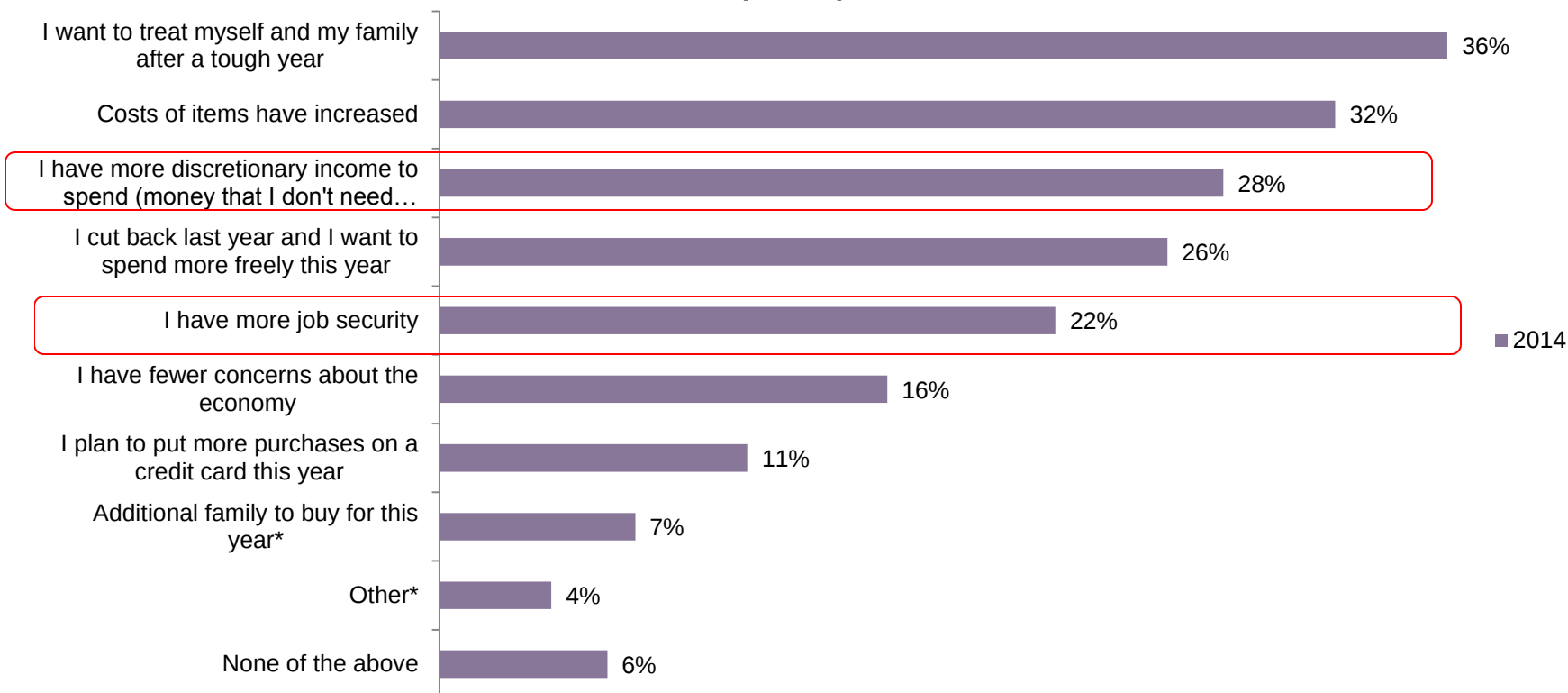


Most shoppers plan to increase their spend to treat their family or cover increased costs; yet, others also indicated greater financial security with higher discretionary income and job security.



Why are you spending more this year?

Multiple responses.

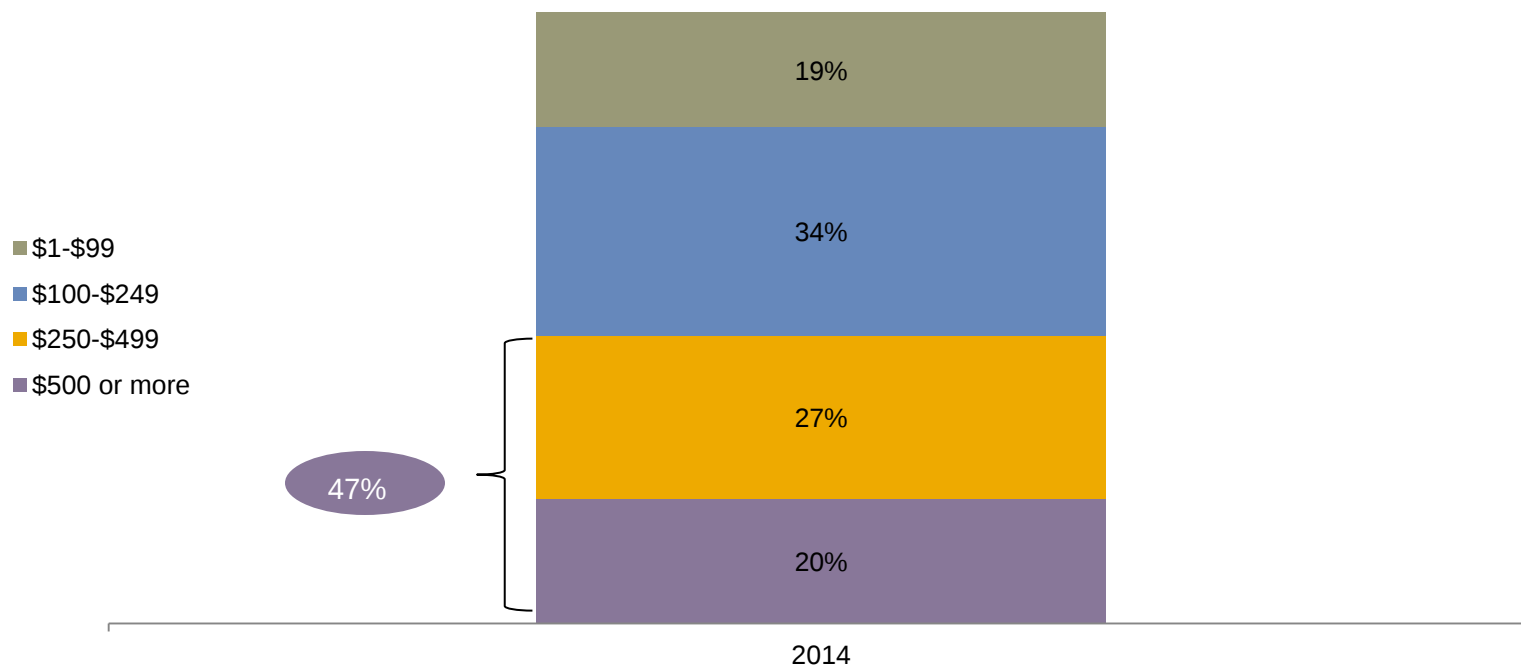


*Responses not included 2013 or 2012

In addition, shoppers are increasing their spend by more than in the prior year. 47% compared expect to increase their spend by more than \$250.



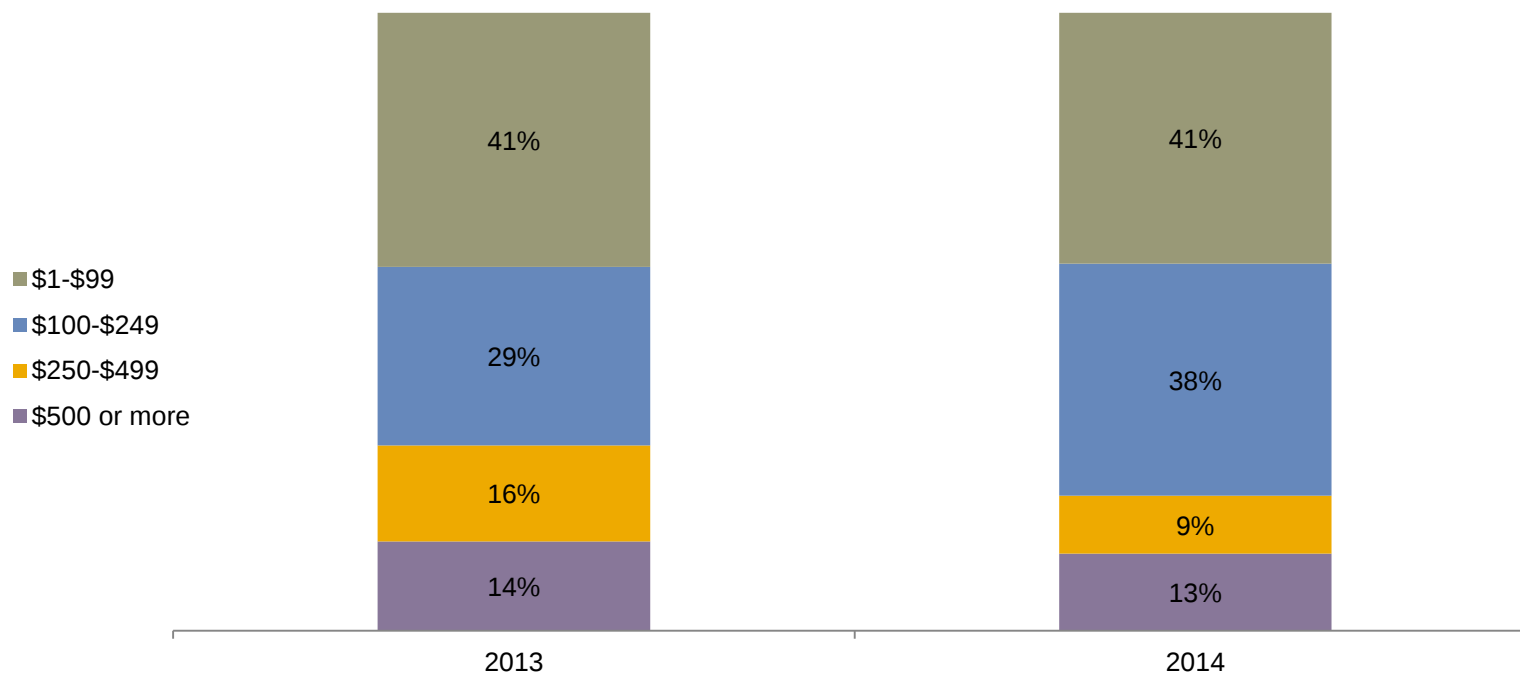
How much more do you estimate you will spend on your holiday shopping this year compared to last year?



Of the 19% of shoppers planning to spend less, 41% are planning to reduce their spend by less than \$100.



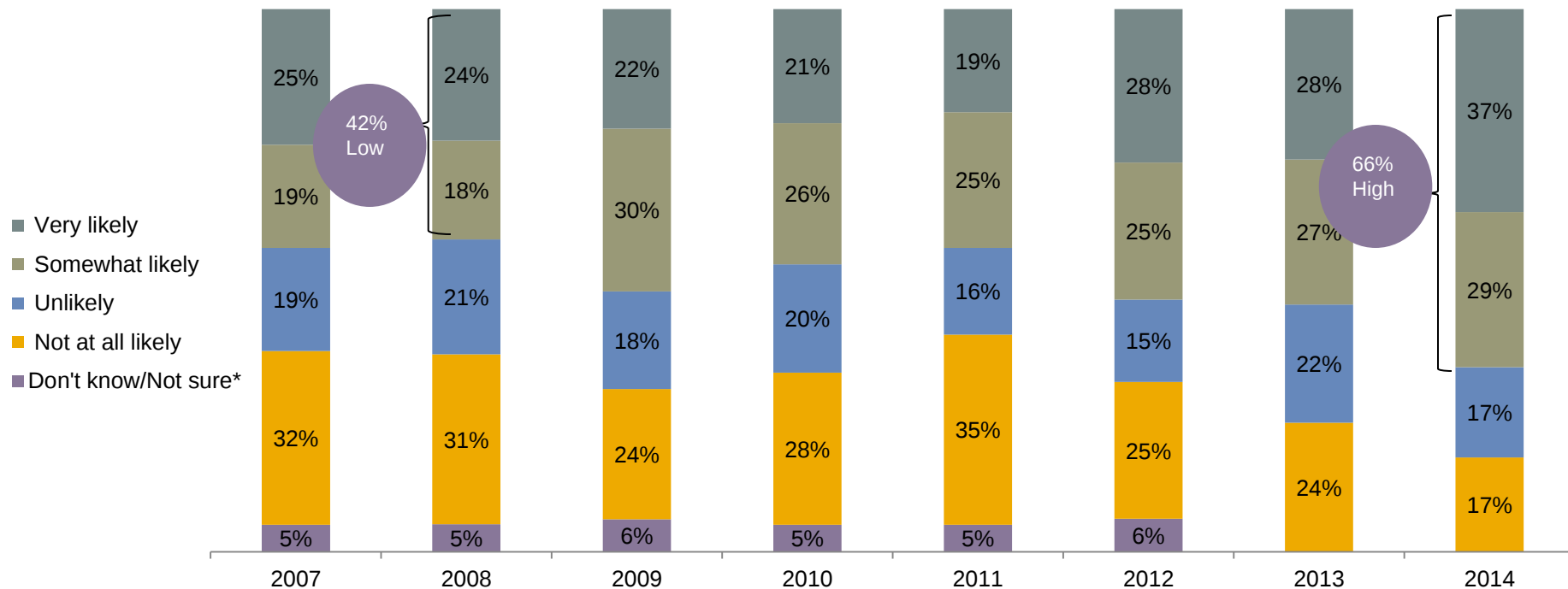
How much less do you estimate you will spend on your holiday shopping this year compared to last year?



Consumer enthusiasm for Black Friday shopping has reached its highest level in eight years. Two-thirds of respondents (66 percent) said they are likely to shop on Black Friday this year.



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

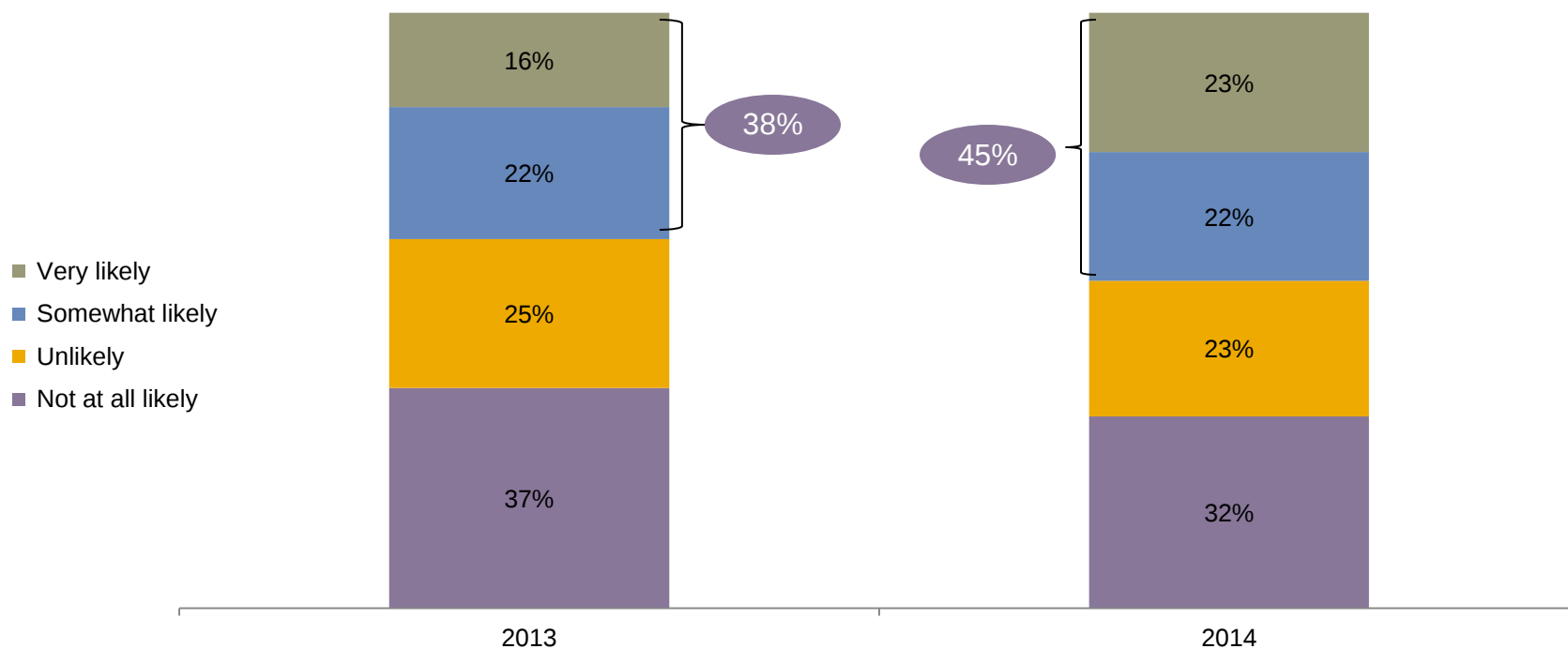


*Response not included 2013 or 2014

Plans to shop on Thanksgiving Day and evening also rose 7 percentage points this year to 45%.



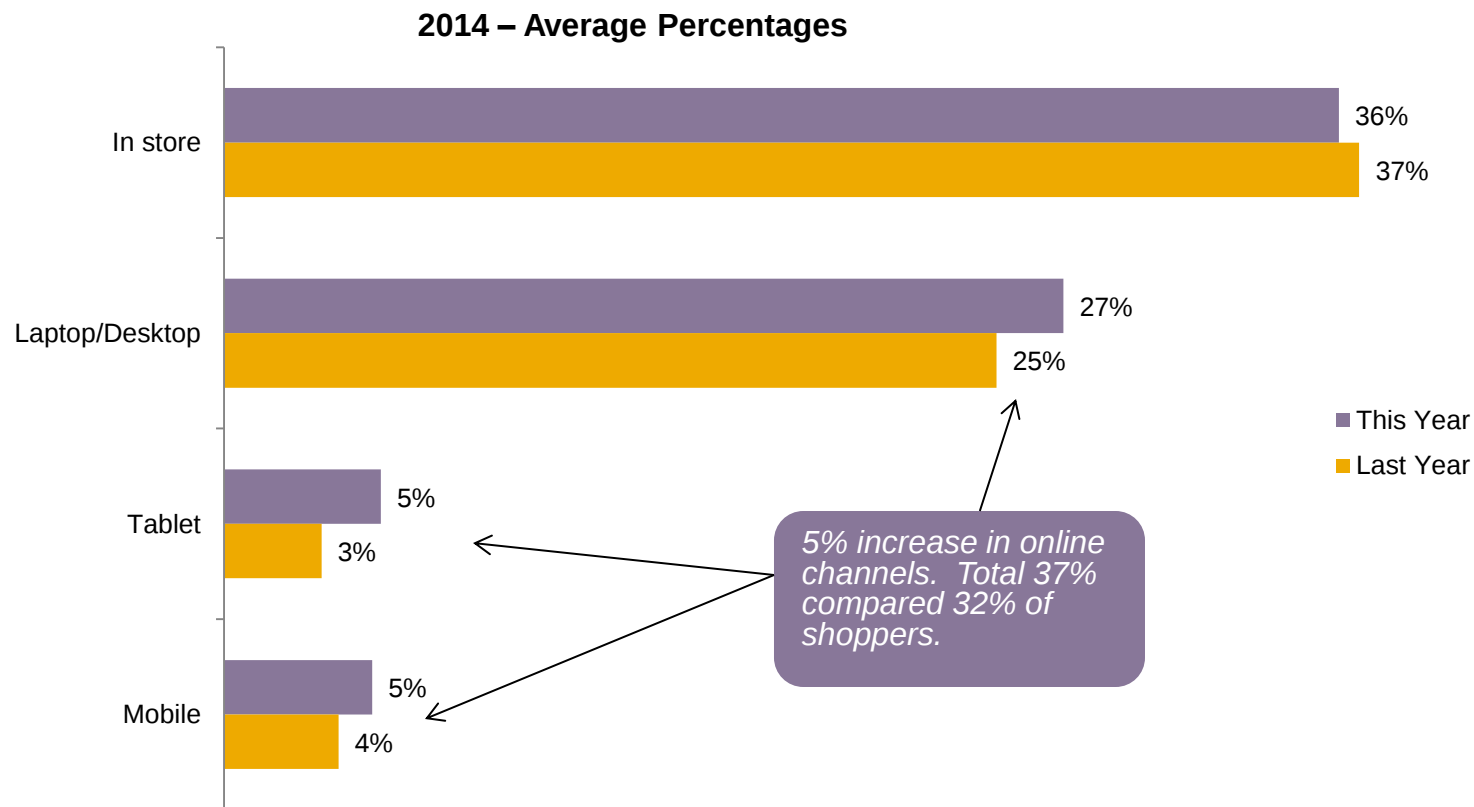
How likely are you to shop on Thanksgiving Day/Night?



Most shoppers during “Black Friday” expect to shop in-store; however, more consumers compared to last year plan to shop online.



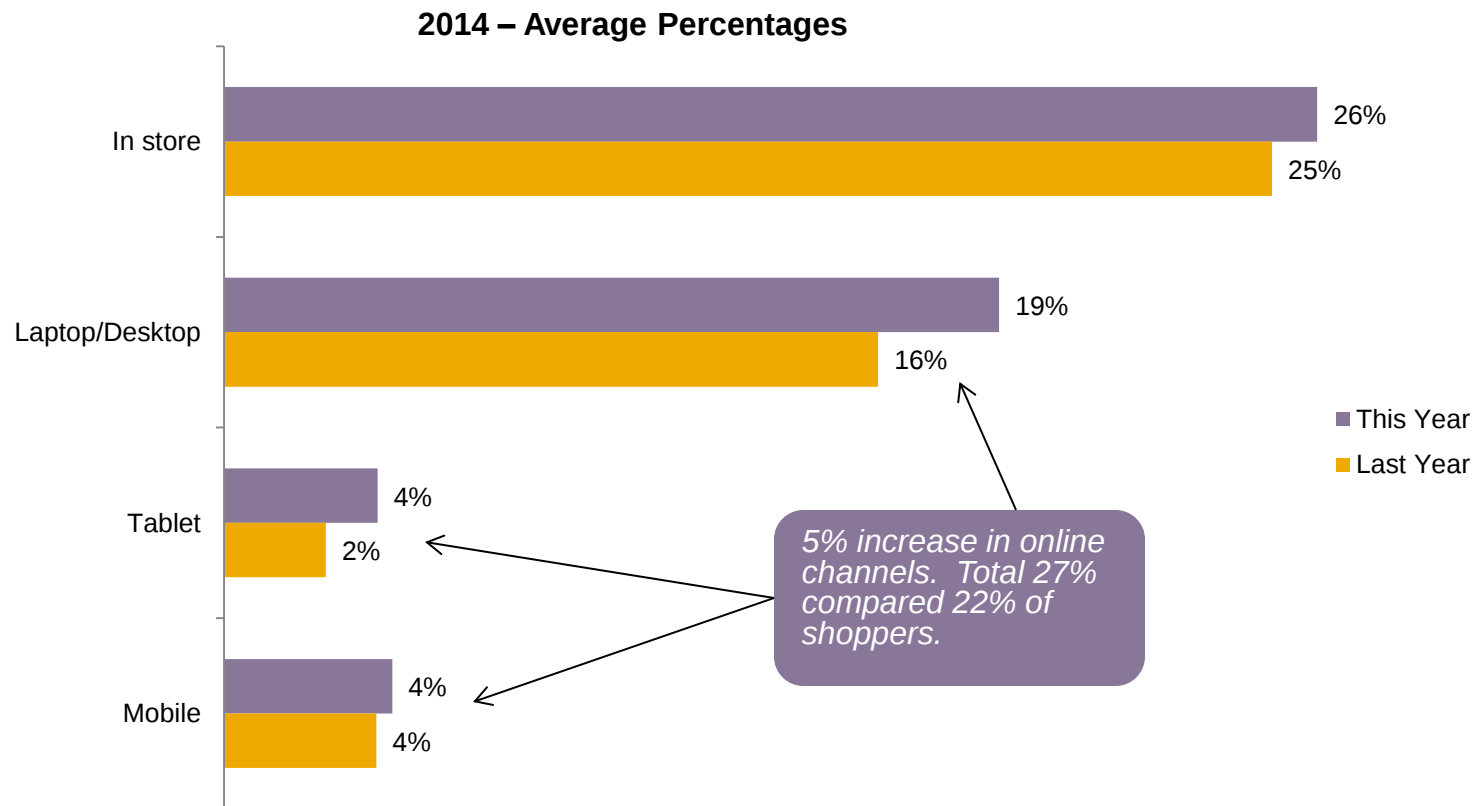
What percentage of your Black Friday shopping will be done in the following channels? Please respond for this year and for last year.



Of consumers shopping on Thanksgiving, most indicated they would purchase in-store; however, more this year compared to last year will be shopping online.



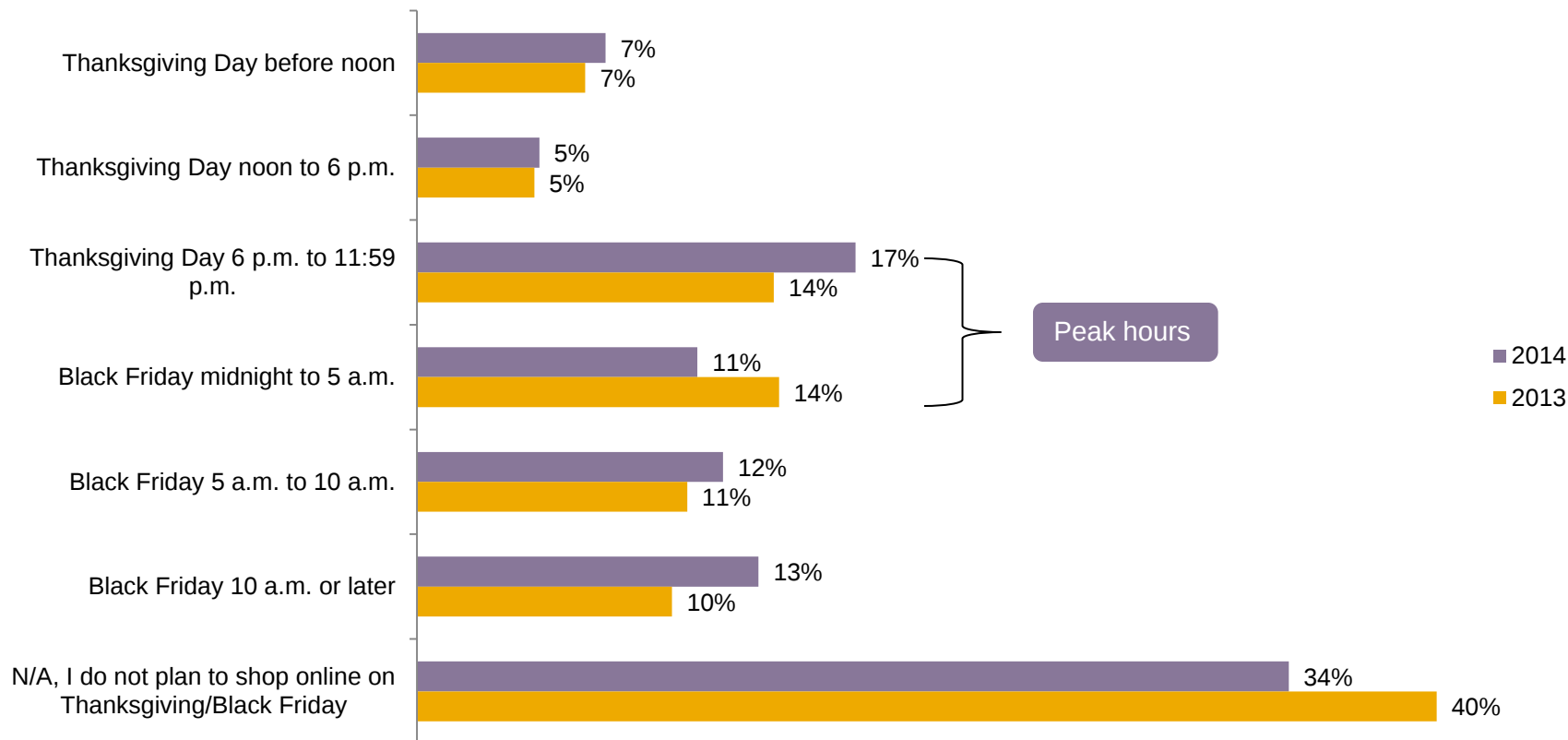
What percentage of your Thanksgiving Day/Night shopping will be done in the following channels? Please respond for this year and for last year.



For those shopping online, most shopping will be done from 6 p.m. on Thanksgiving Day to 5 a.m. on Black Friday.



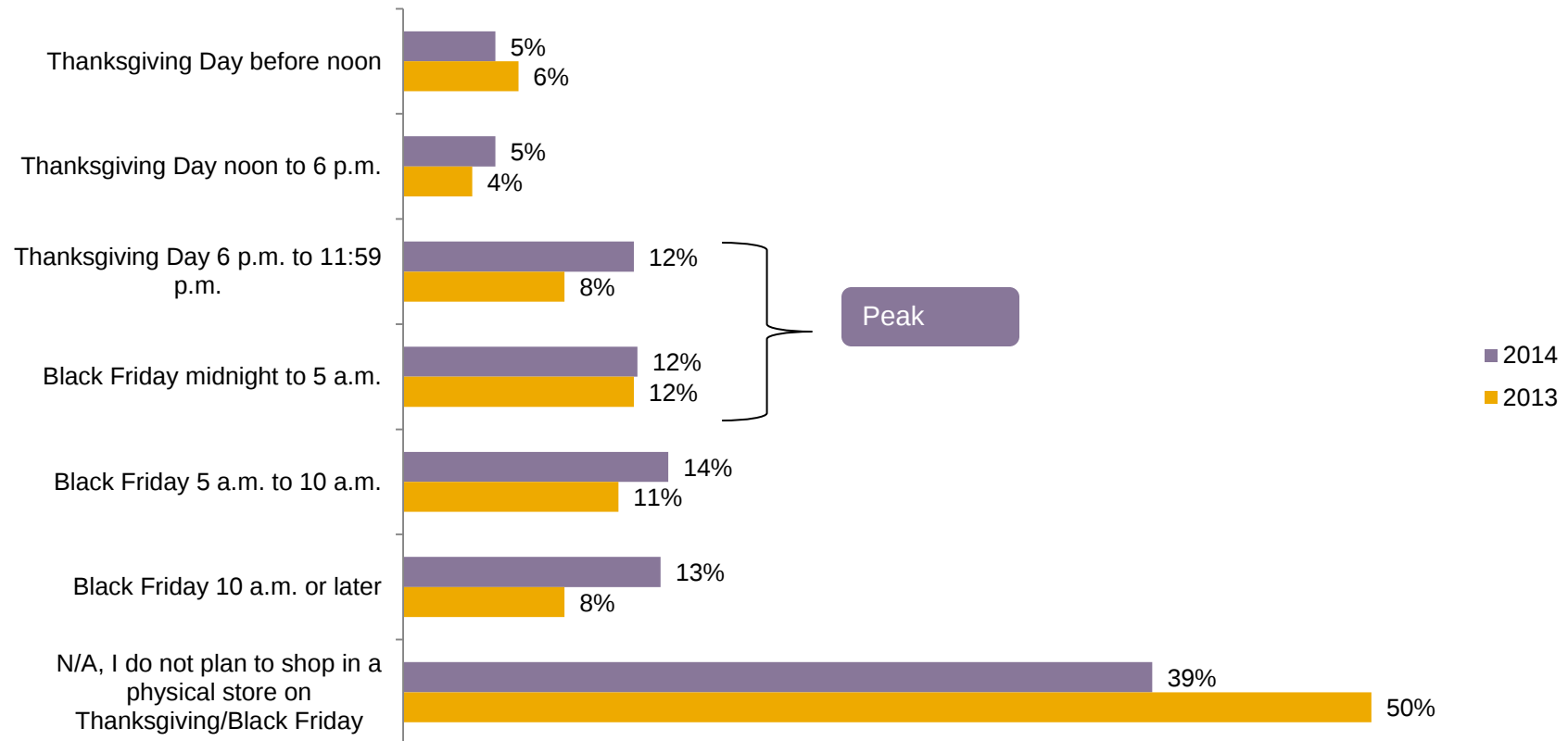
What time do you plan to begin your shopping online on Thanksgiving/Black Friday?



Of those consumers planning to shop on the holiday, 47 percent said that they will be shopping in a physical store between 6 PM Thanksgiving Day and 5 AM on Black Friday.



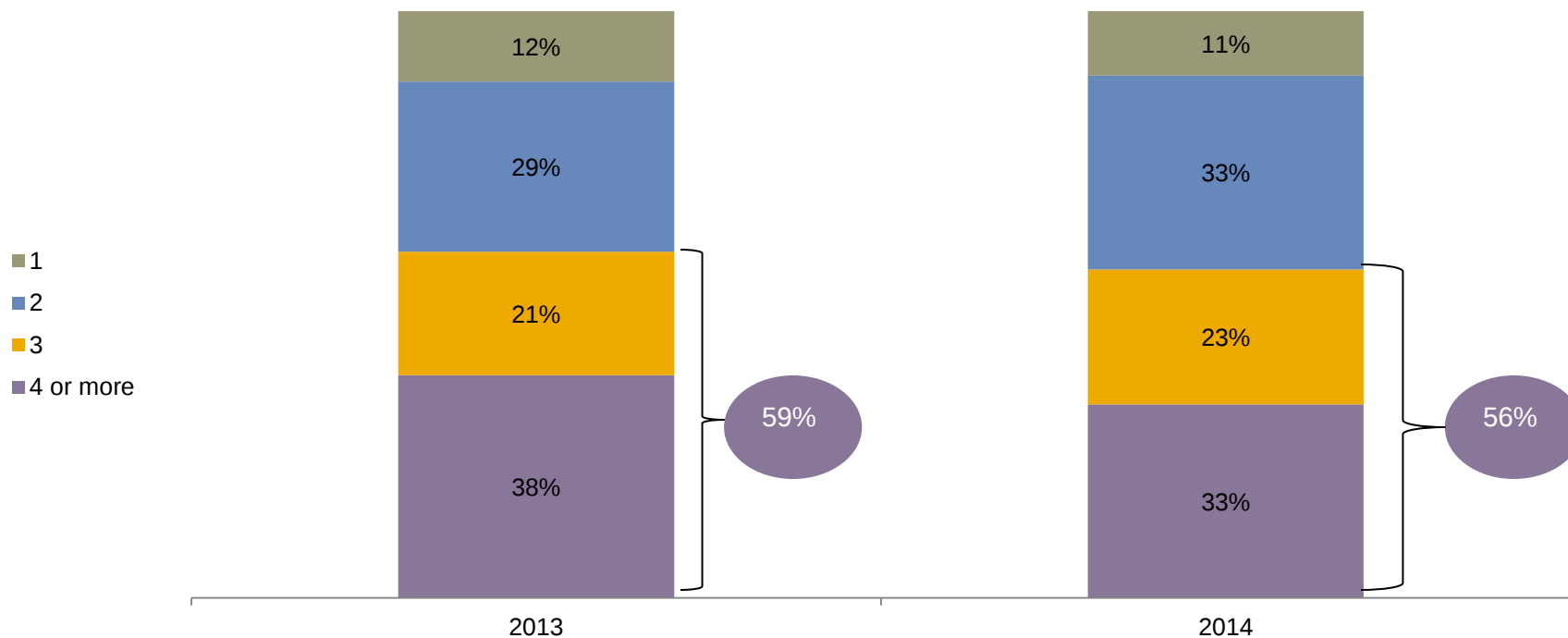
What time do you plan to begin your shopping in a physical store on Thanksgiving/Black Friday?



Out of those shoppers planning to shop in physical stores on Thanksgiving and/or Black Friday, 56% are planning to go to 3 or more stores.



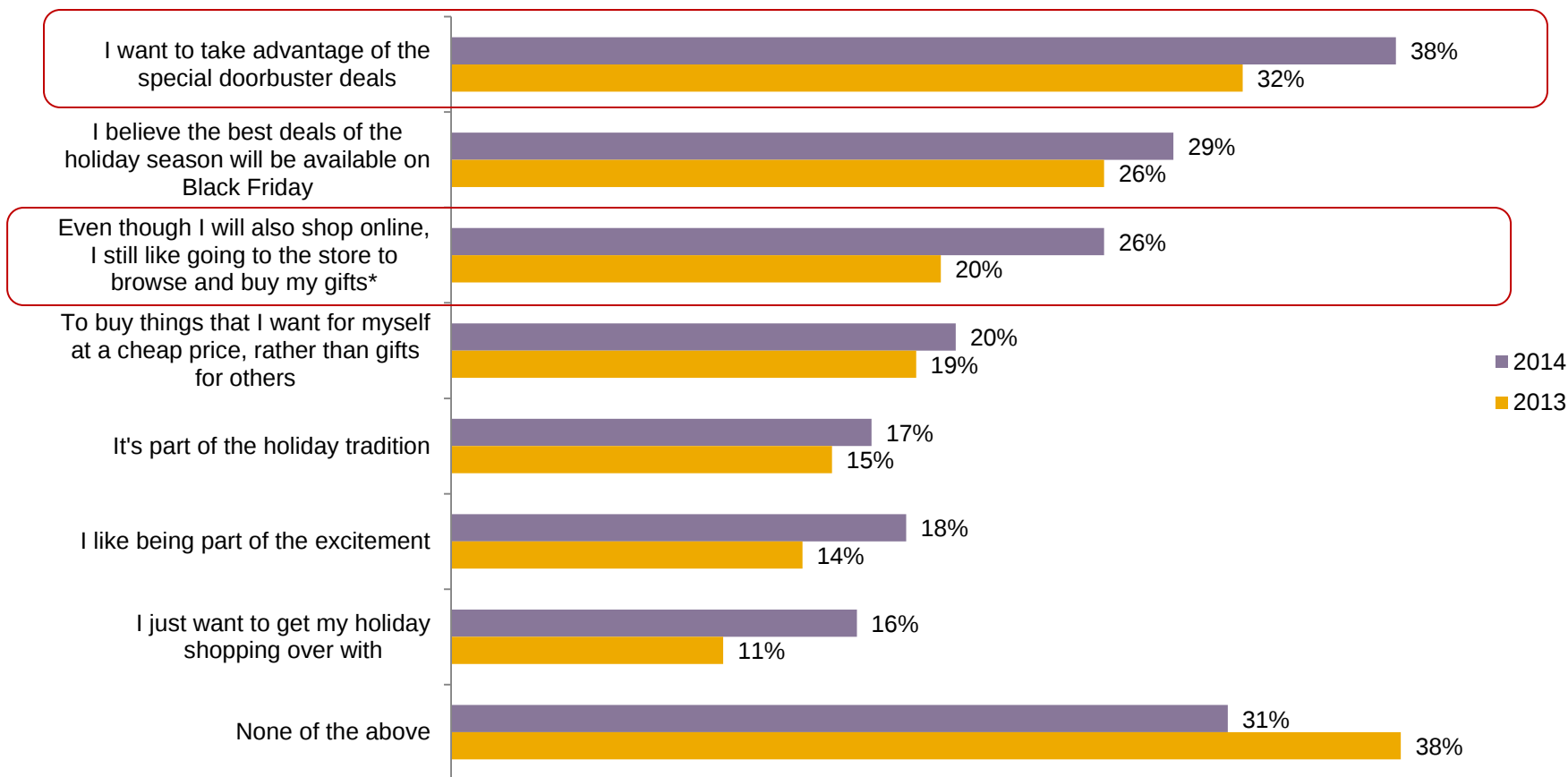
How many stores do you plan to go to on Thanksgiving and/or Black Friday?



Most shop in a store on Black Friday to take advantage of doorbuster deals; also, many will go to stores to browse and others believe the best deals of the season are available on Black Friday.



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

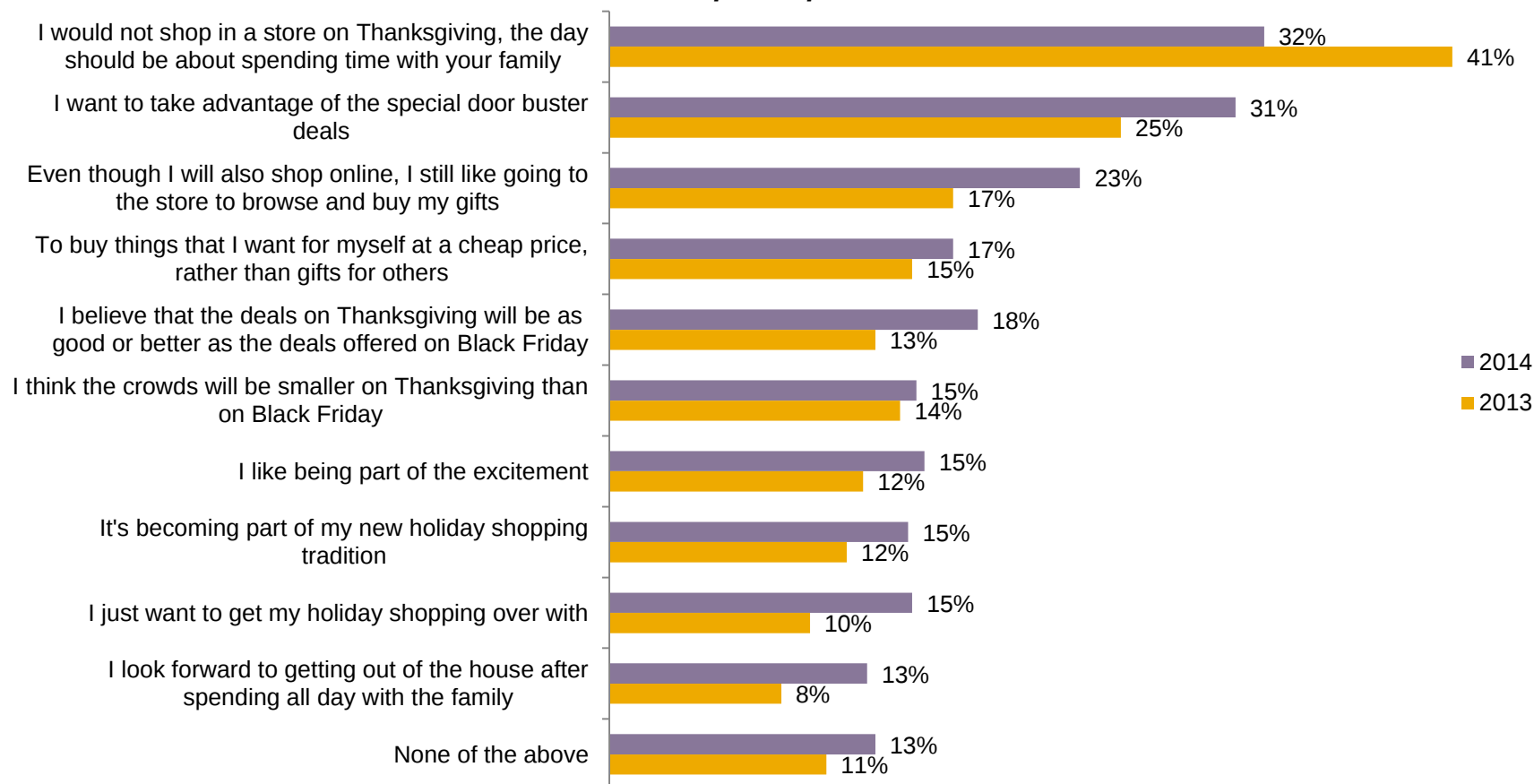


Fewer shoppers compared to last year (32% down from 41%) said that interfering with family time was a reason to not shop in a physical store on Thanksgiving.



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?

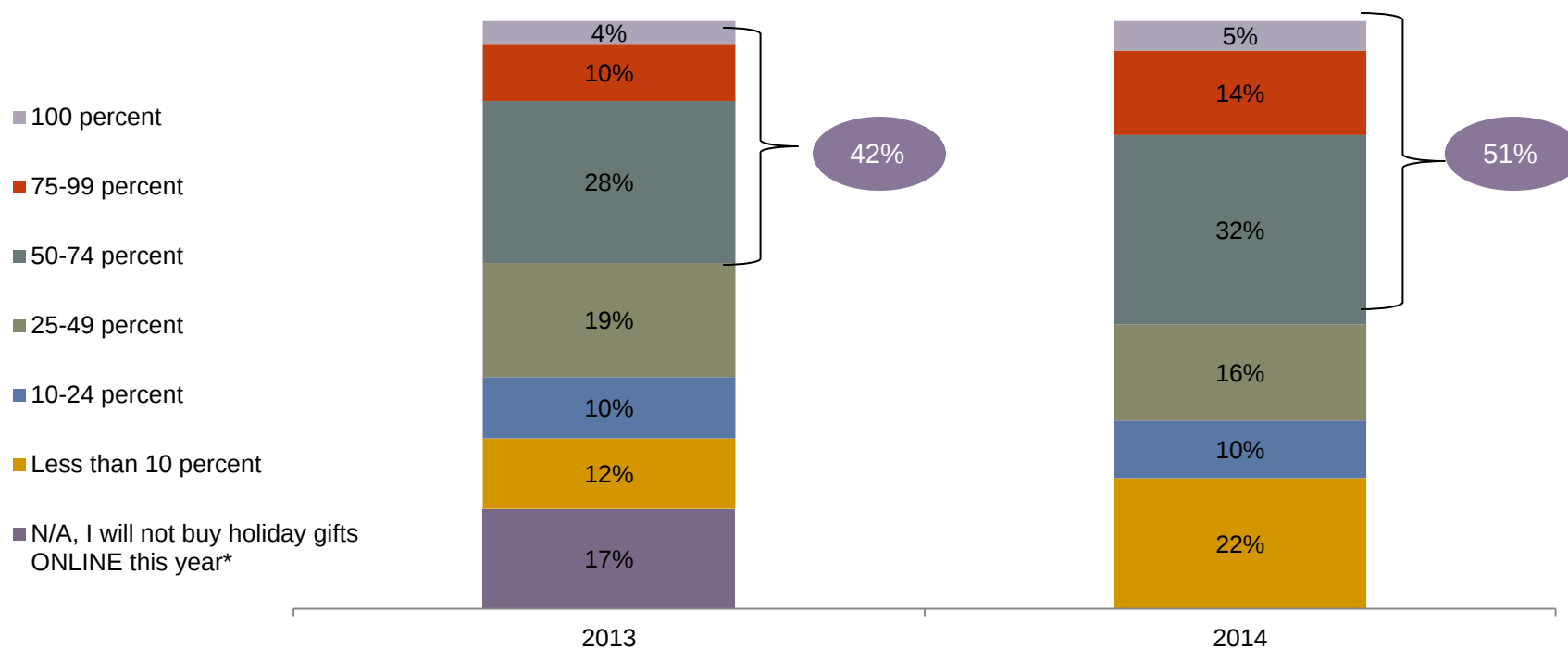
Multiple responses.



Overall this holiday season, more than half (51%) of shoppers plan to spend 50% or more of their holiday gift dollars online.



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

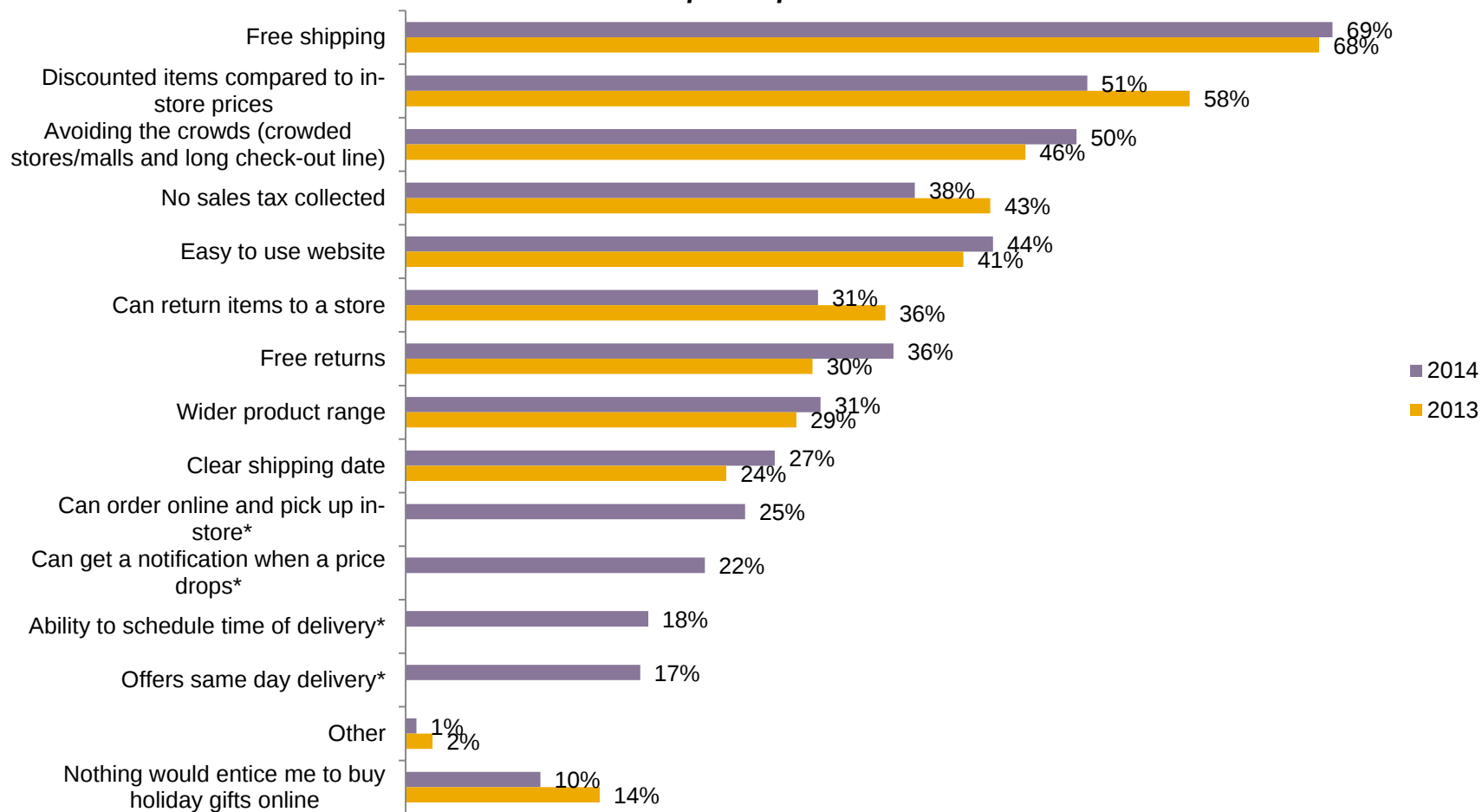


*Responses not included 2012 or 2014

Free shipping, followed by higher discounts online and avoiding crowds, are the top three reasons to shop online.



Which of the following would make you most likely to buy holiday gifts online?
Multiple responses.

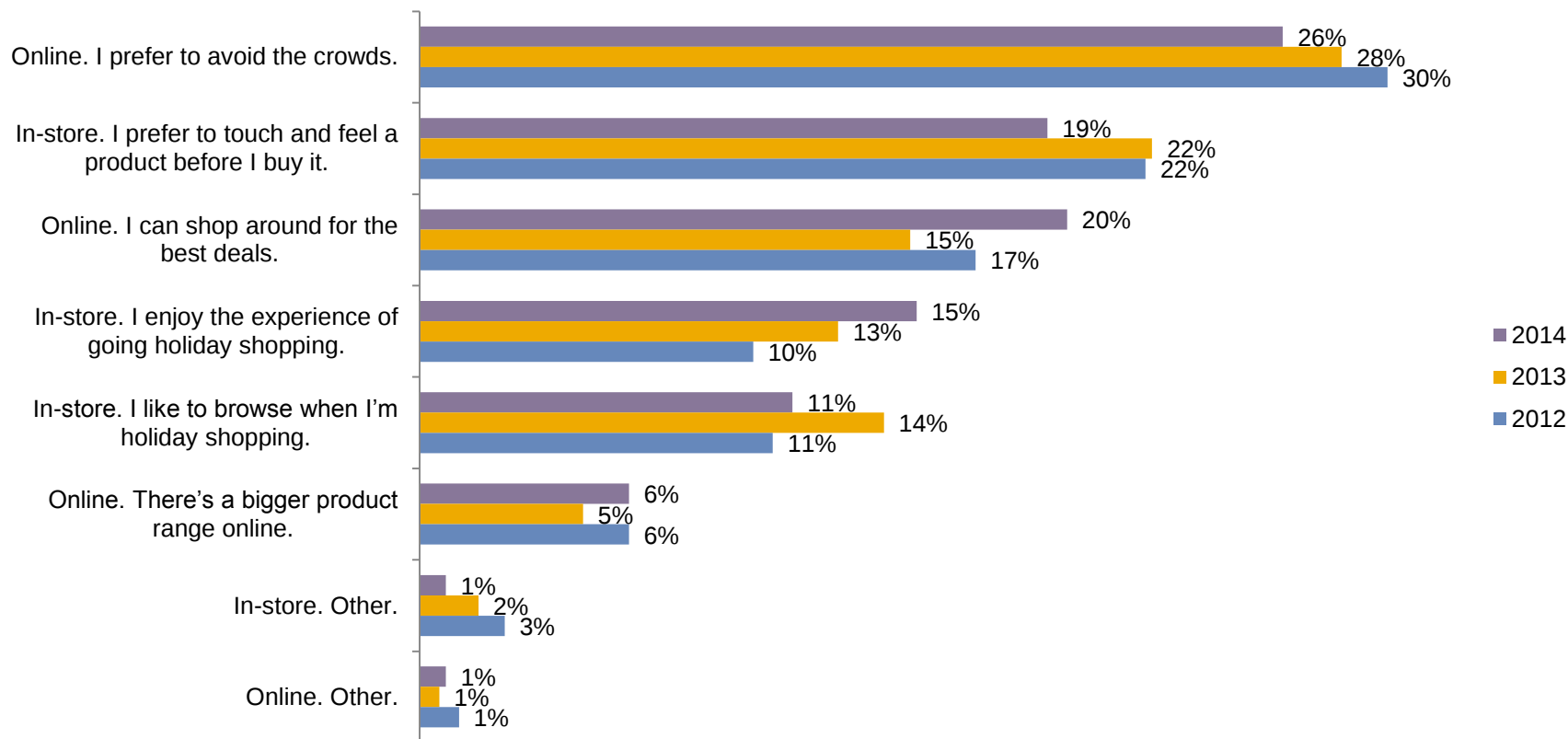


*Responses not included 2012 or 2013

Shoppers are increasingly shopping online to find the best deals – up 5 points from 15% to 20% over last year.



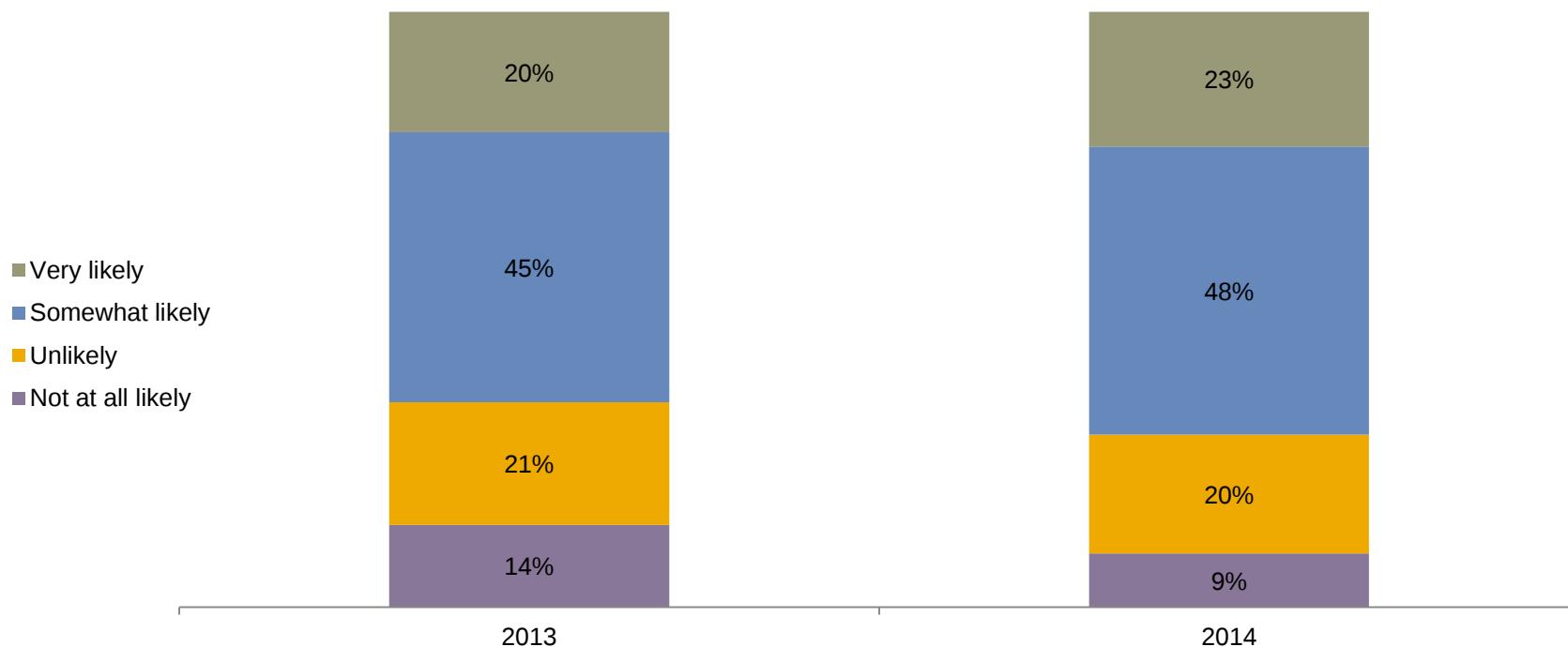
If a retailer sells their products both online and in physical stores, which shopping option do you prefer for the holiday season, and why?



This holiday season, a growing number of consumers (71%) plan to participate in “webrooming”.



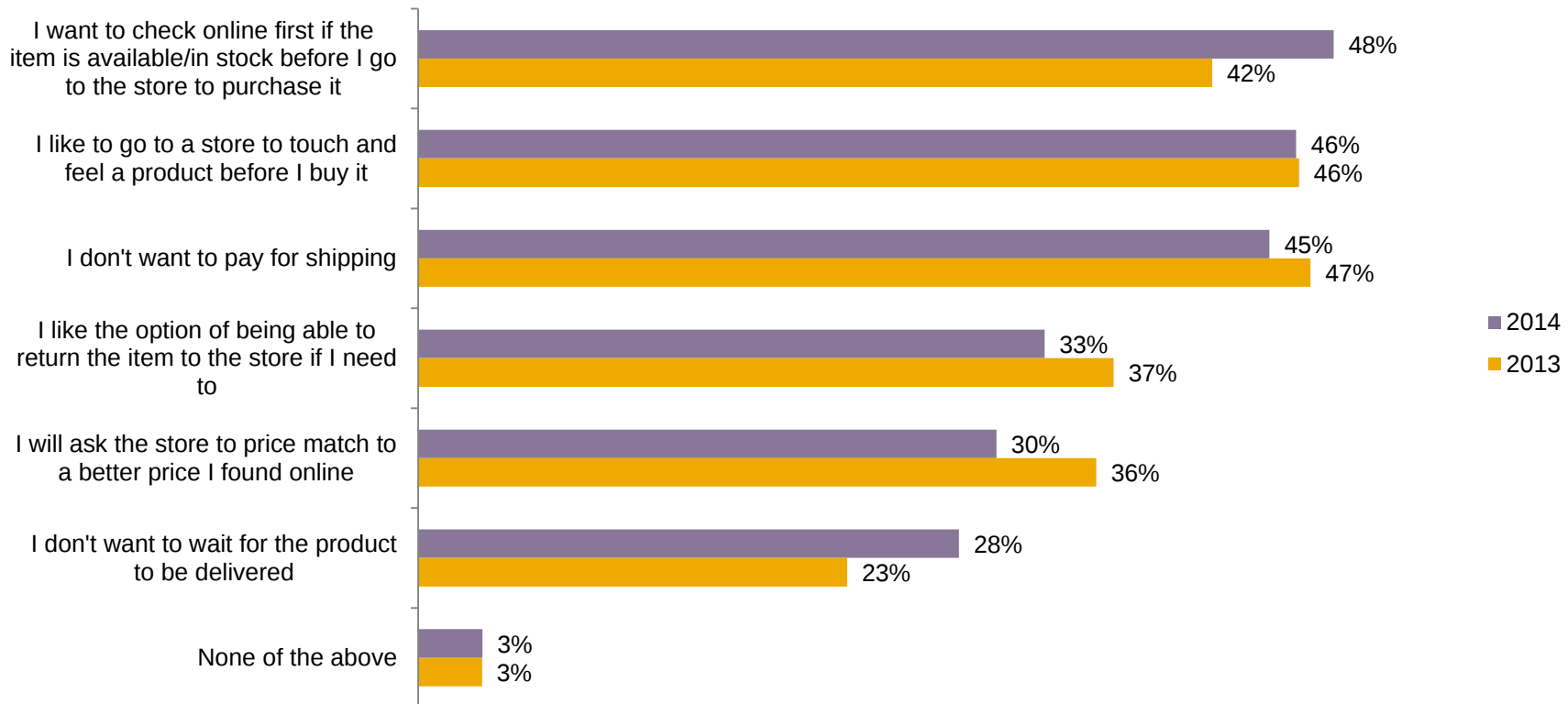
How likely are you to look at items online, go to a store to see the item, and then make your purchase at the store (webrooming)?



While researching online offers consumers many conveniences, checking online to determine if a product is in stock was the top reason for webrooming (48 percent, up from 42 percent in 2013).



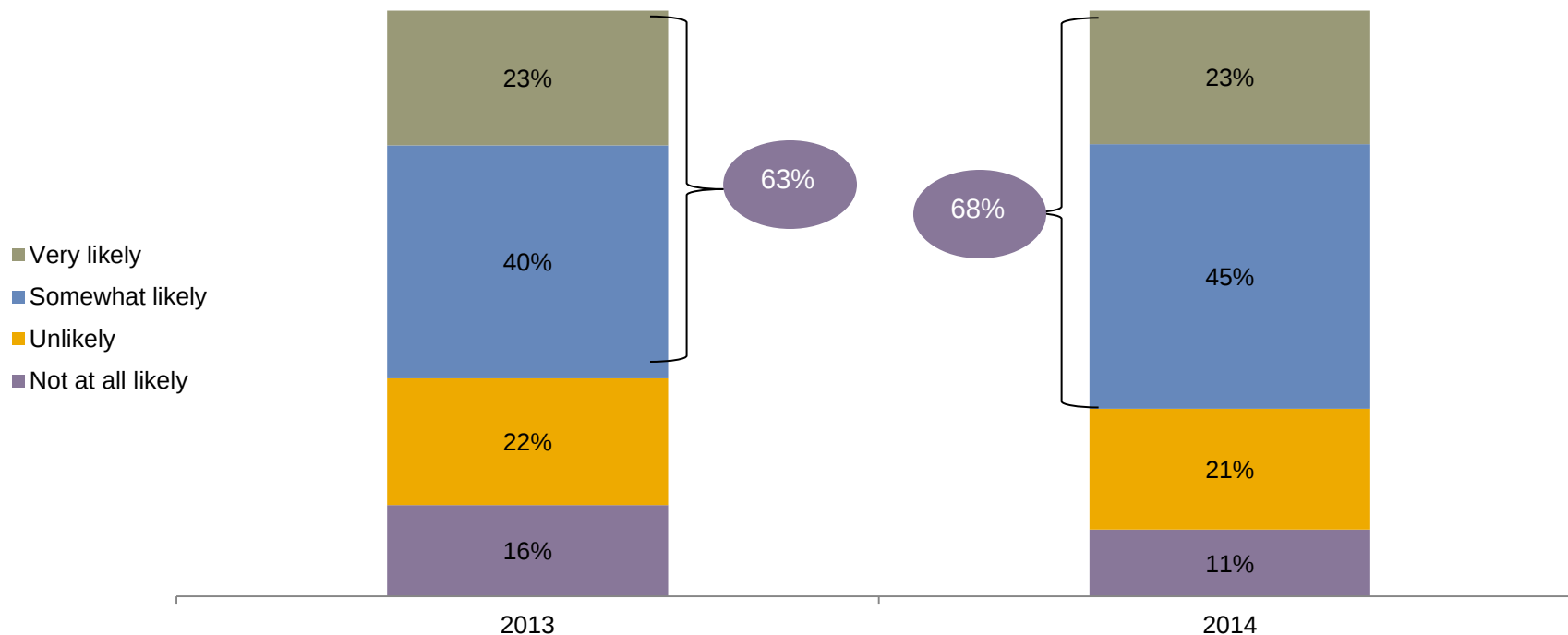
Why would you look online for an item before going to the physical store to make a purchase?
Multiple responses.





68% of consumers are likely to participate in “showrooming”.

How likely are you to go to a store to look at a gift item in-store then search online for the best price and purchase online (showrooming)?

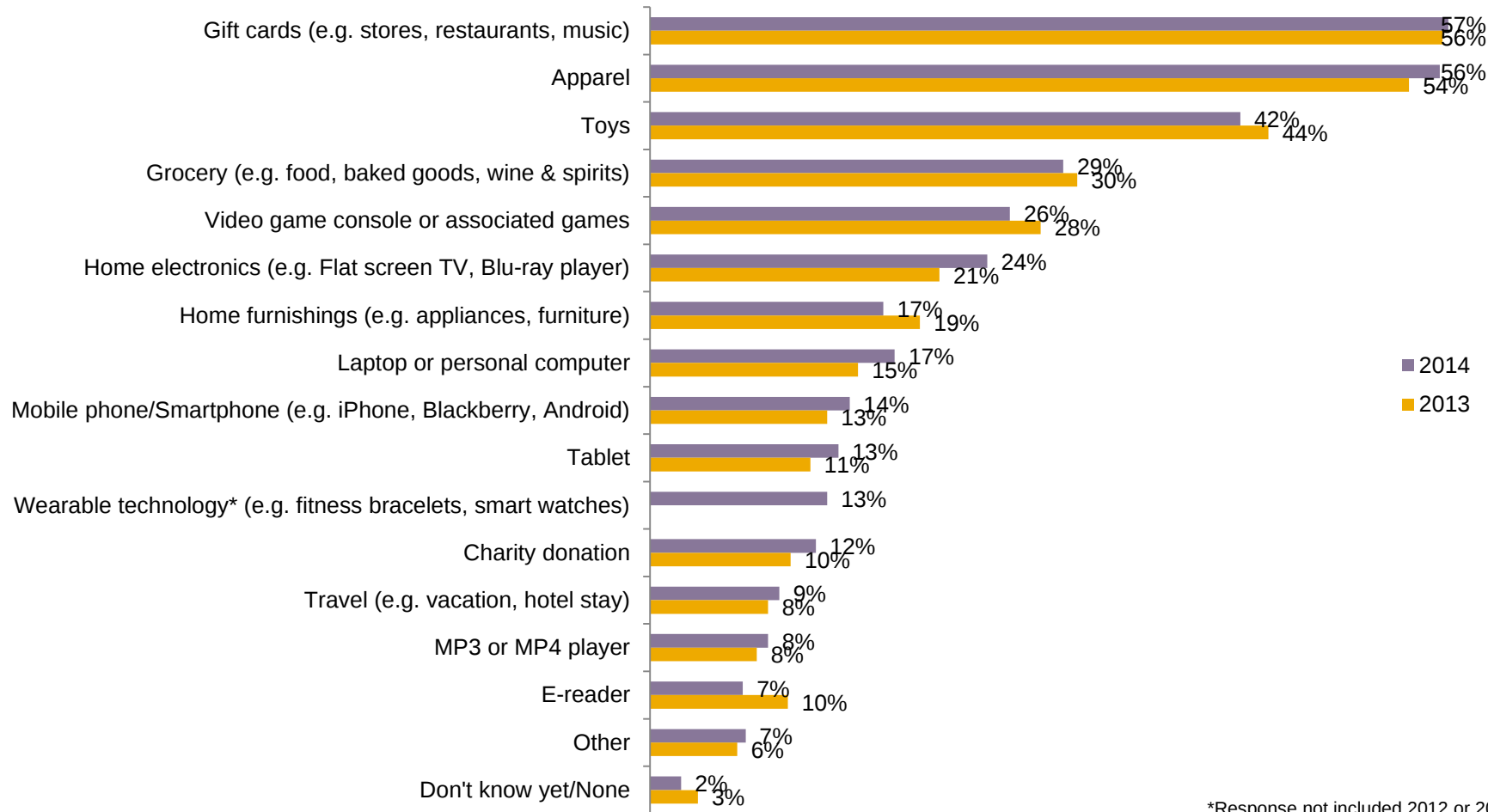


Gift cards (57%), apparel (56%), toys (42%) and electronics top consumers' holiday shopping lists this year. 13% plan to buy wearable technology, 14% smartphones and 13% tablets.



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

Multiple responses.

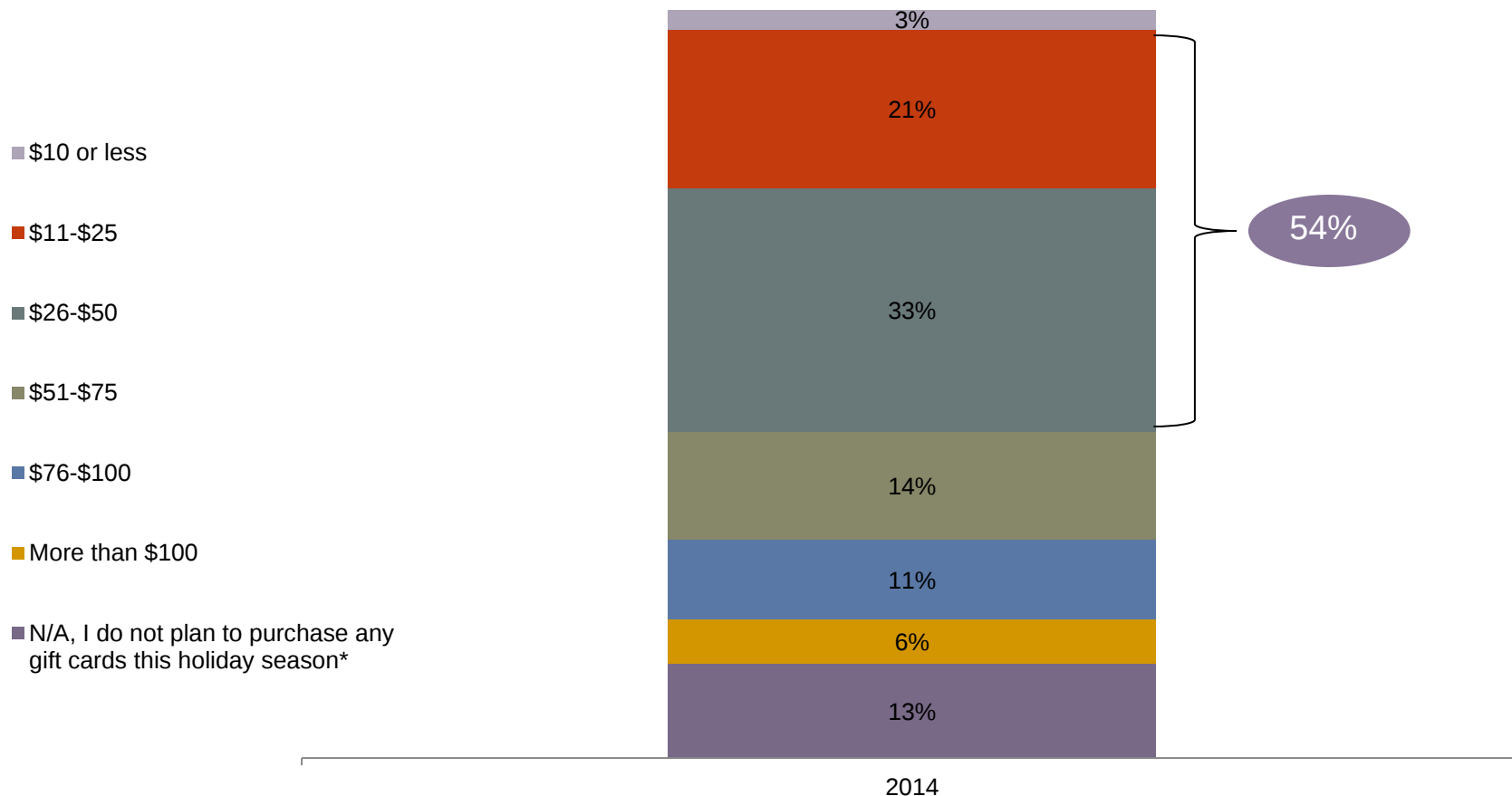


*Response not included 2012 or 2013

54% of respondents plan to spend between \$11 and \$50 on a gift card; gift cards for restaurants, discount retailers and prepaid, multiuse cards are the most popular.



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

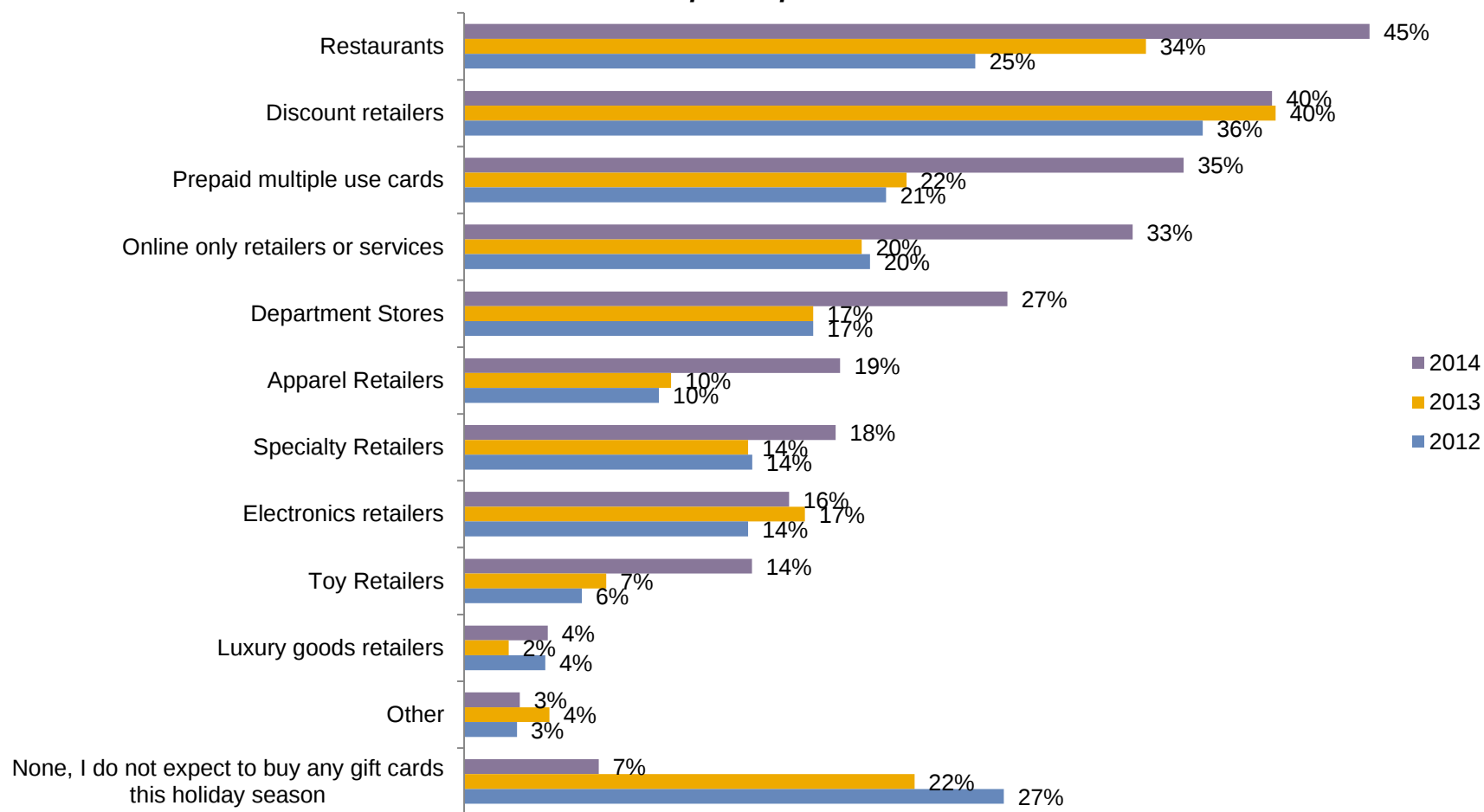


*Response not included 2012 or 2013

Restaurant, discount store and multi-use gift cards are the most popular.



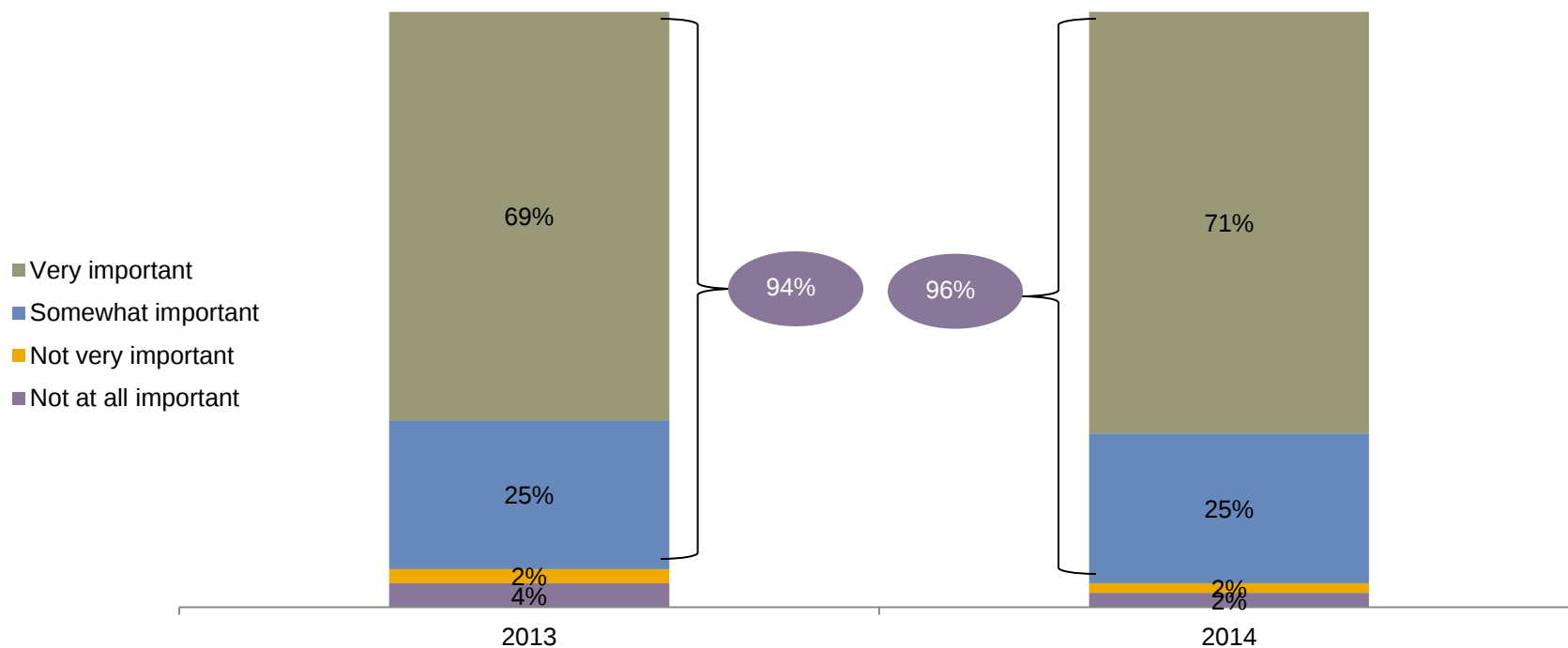
What type of gift cards do you expect to buy this holiday season?
Multiple responses.



Even though holiday shoppers intend to spend more, nearly all respondents (96%) said that discounts will be important to their purchasing decisions, up from 94% in 2013.



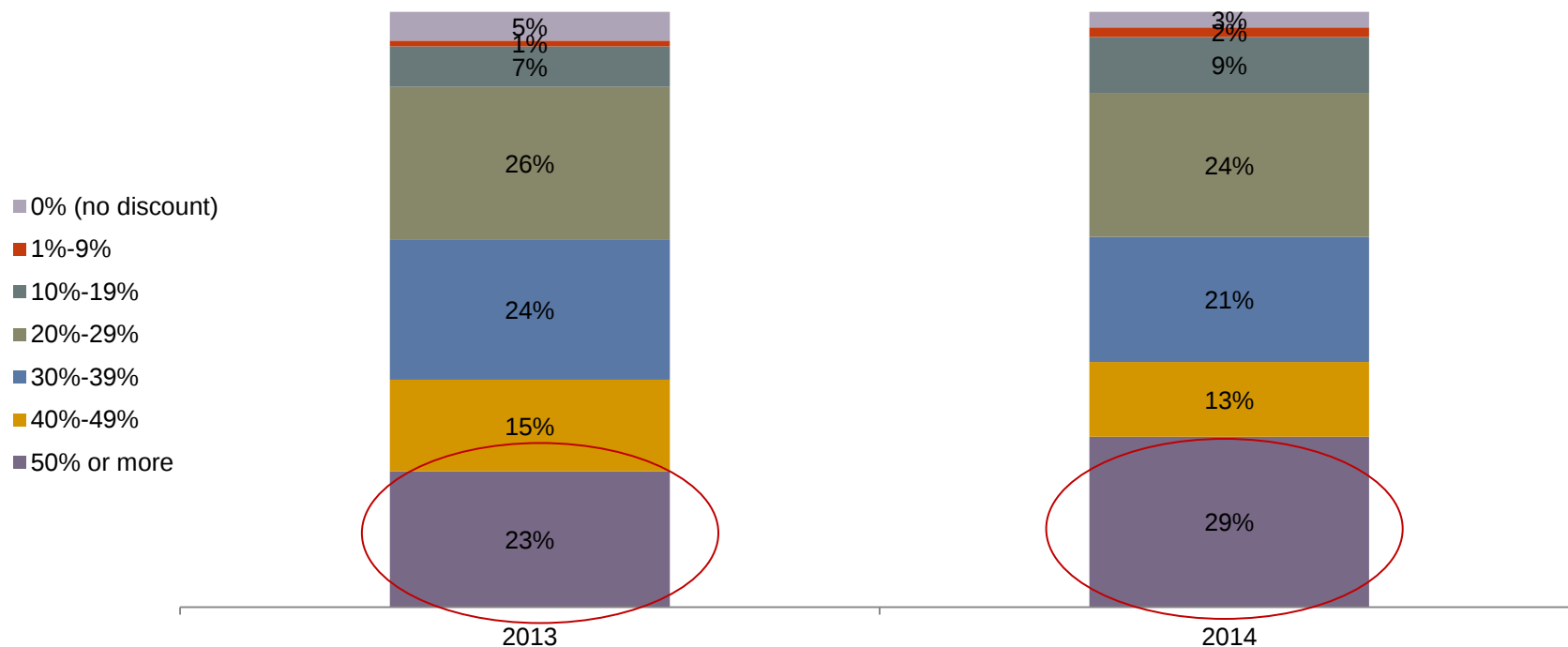
How important are discounts and sales for items you are likely to purchase this holiday season?



Shoppers have gotten very used to discounts during the holiday season. 29% vs 23% in 2013 indicated that they would not purchase an item without more than a 50% discount.



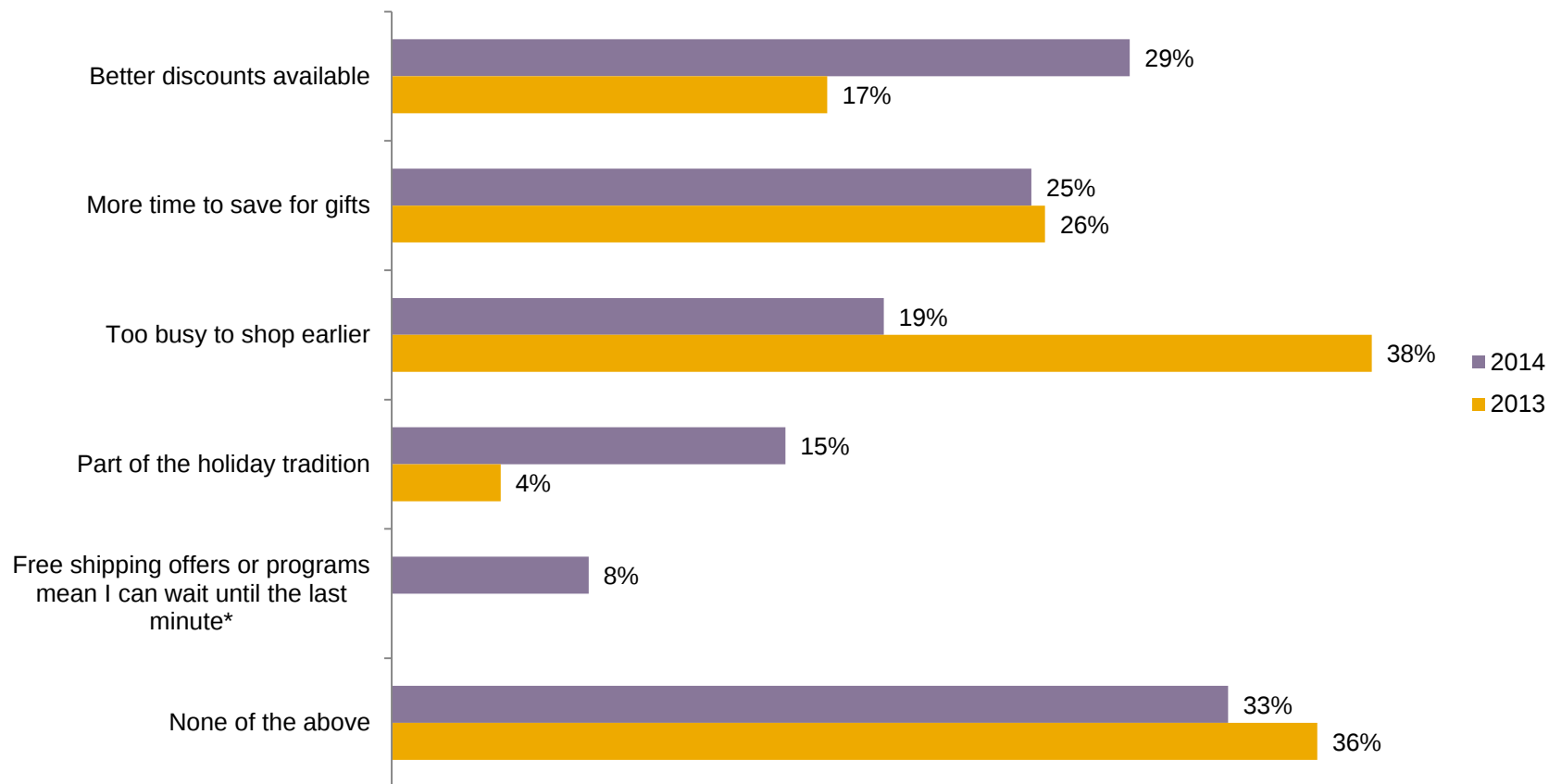
When holiday shopping, what is the typical percentage discount that persuades you to purchase an item?



Better discounts have become the strongest motivator to wait to make purchases.



What is your motive for shopping late in the holiday season? *Multiple responses.*

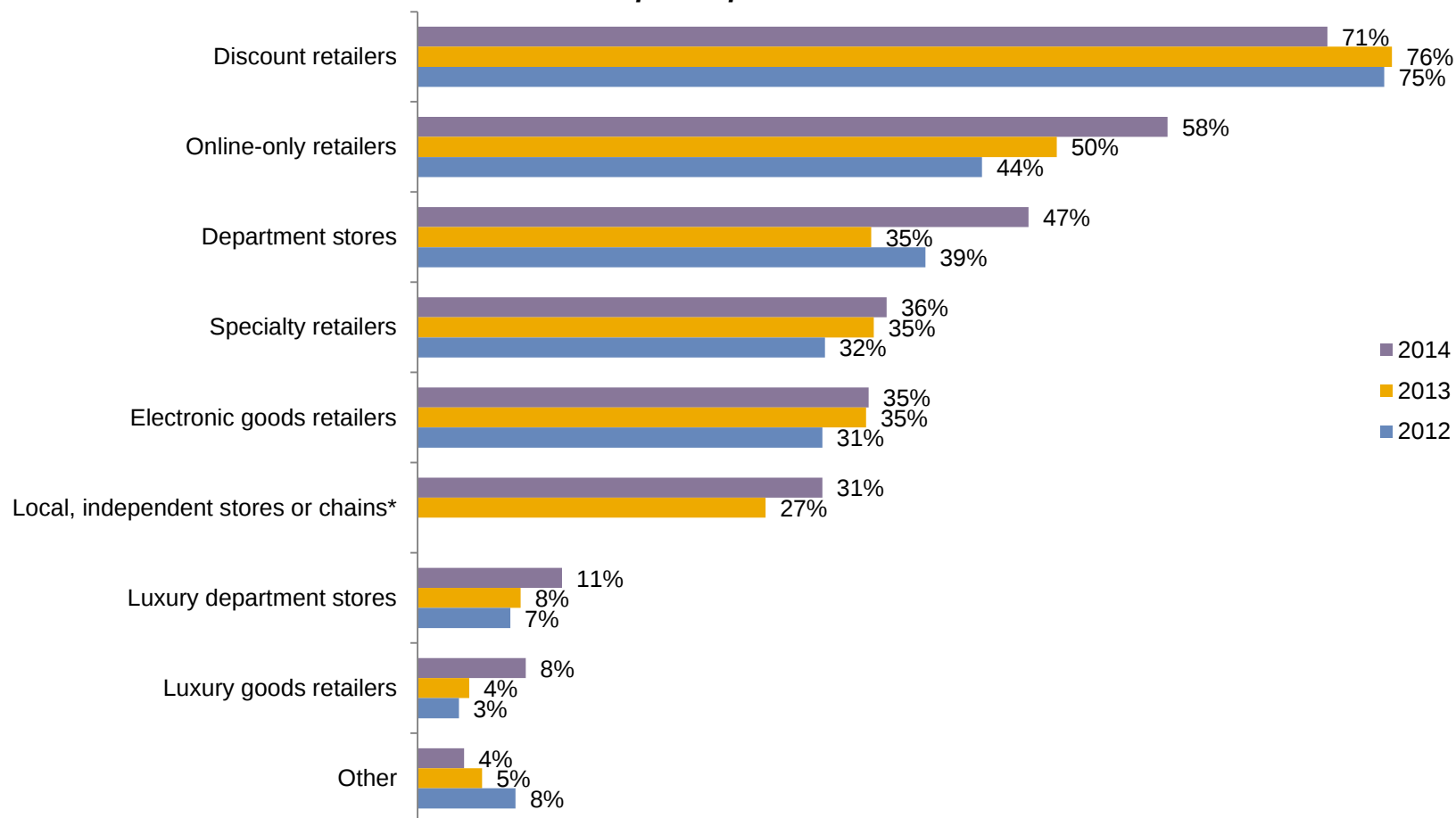


*Response not included 2013

Discount retailers continue to be the top destination for shoppers this holiday season (71%); however, pure online retailers and dept. stores are gaining share at 58% up from 50% and at 47% up from 35%, respectively.



In what types of stores will you be doing your holiday shopping this year?
Multiple responses.

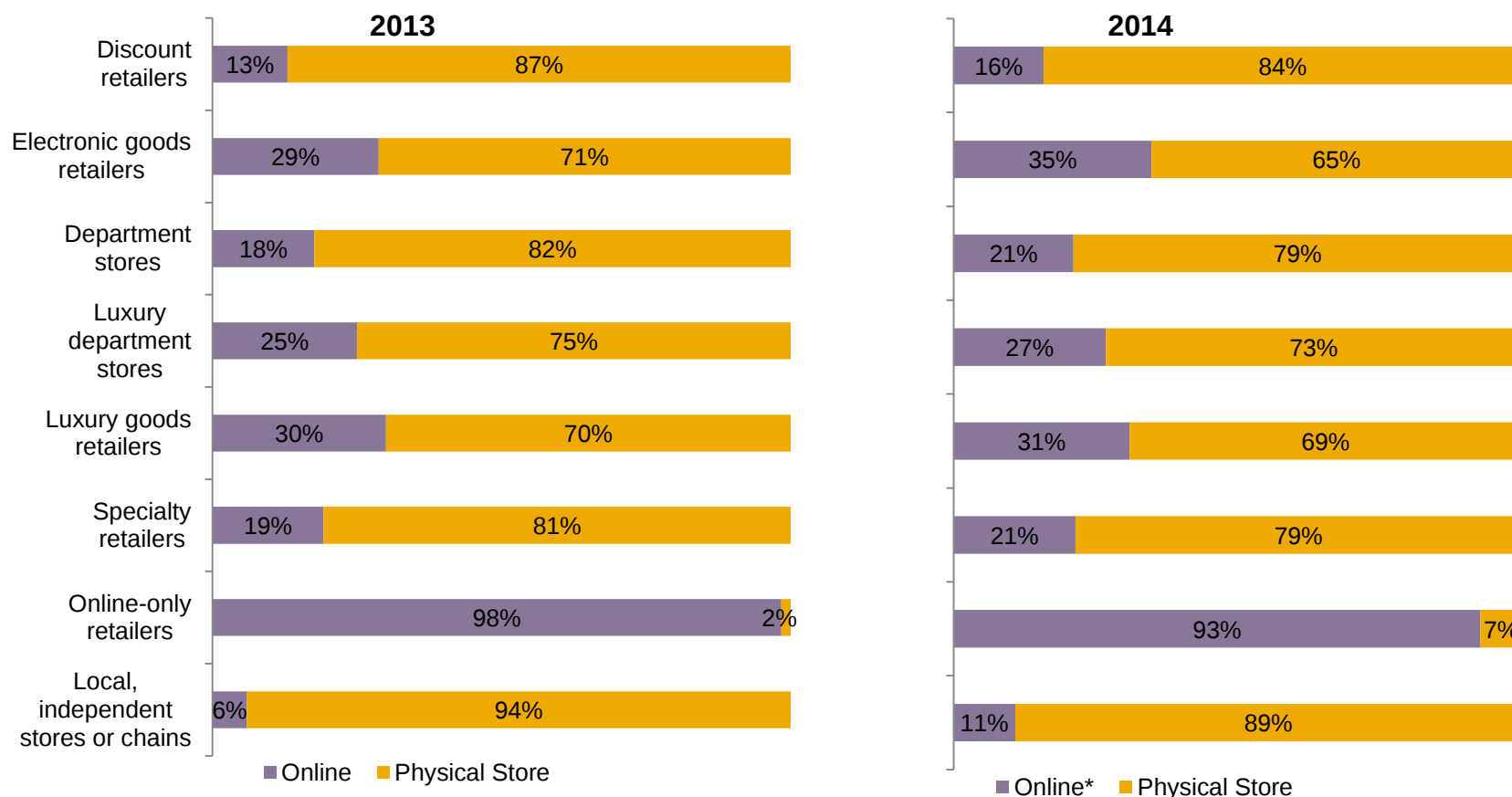


*Response not included 2011 or 2012

For the last two years, discount retailers ranked second among the most shopped physical store retail locations.



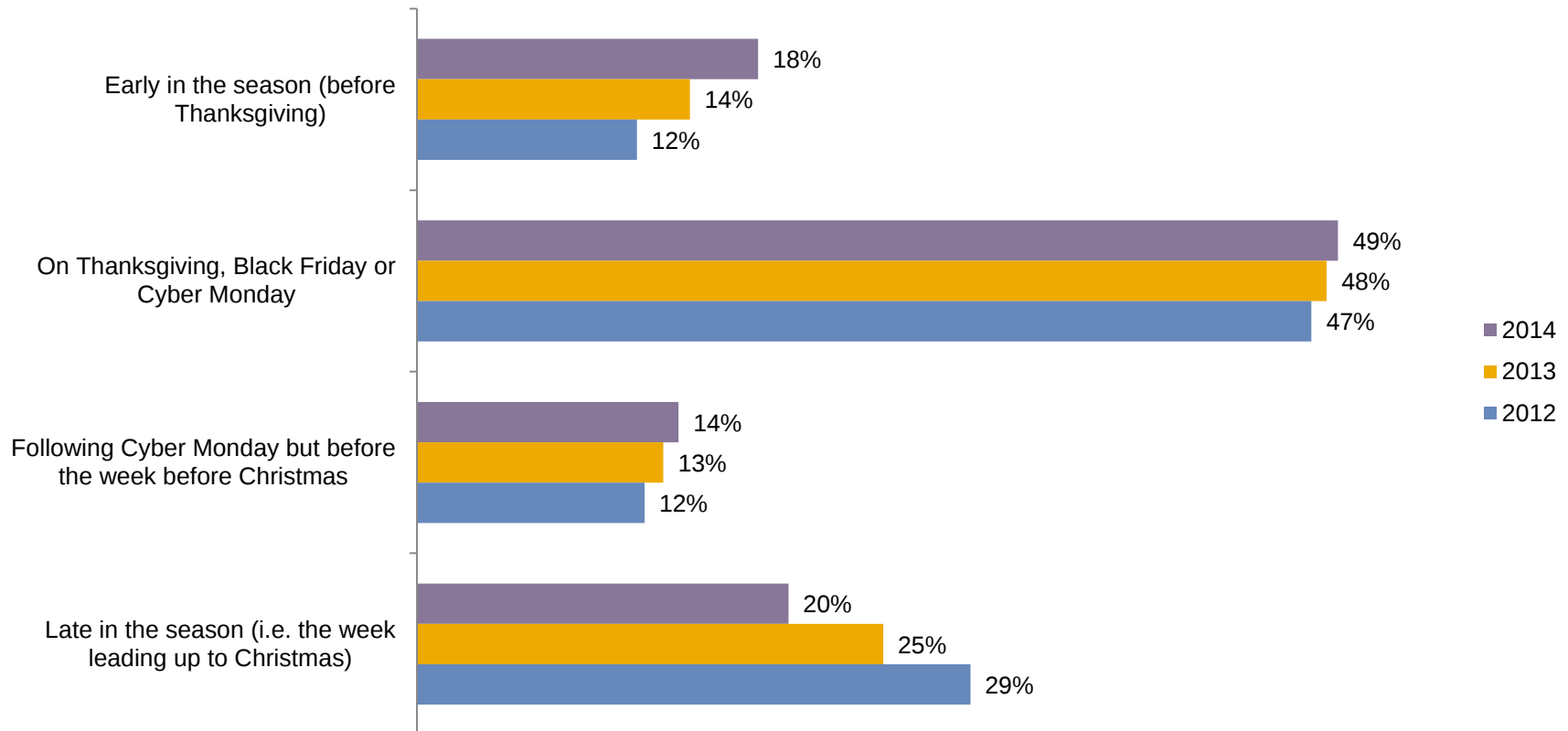
Where do you expect to make the majority of your purchases for each of these stores?



More consumers over the past three years believe the best discounts of the season can be found before Thanksgiving and Black Friday: 18% in 2014, compared to 14% in 2013 and 12% in 2012.



When do you expect the best discounts will be available?

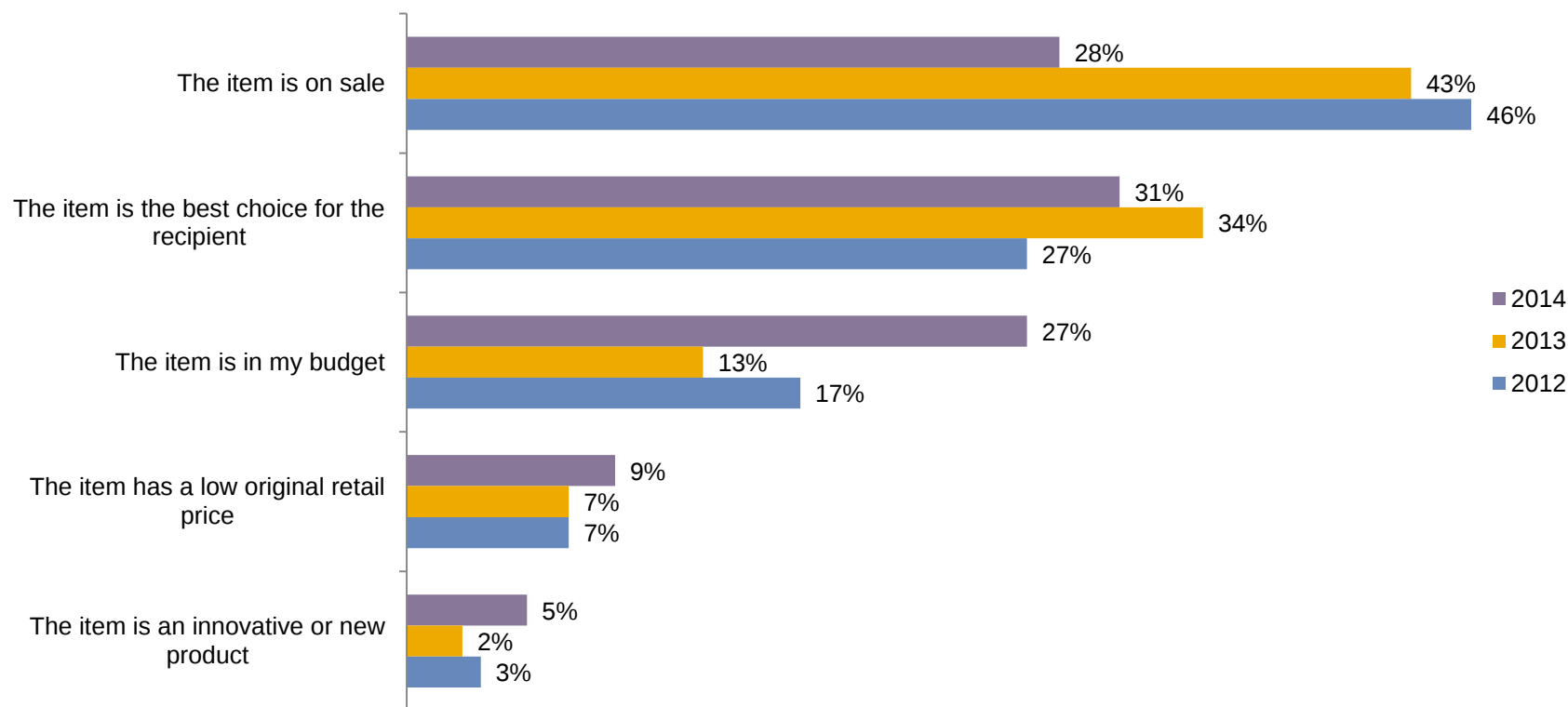


Shoppers are more budget conscious this year: 27% (vs. 13% last year) say that it's important that the items they plan to purchase are within their budget.



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.

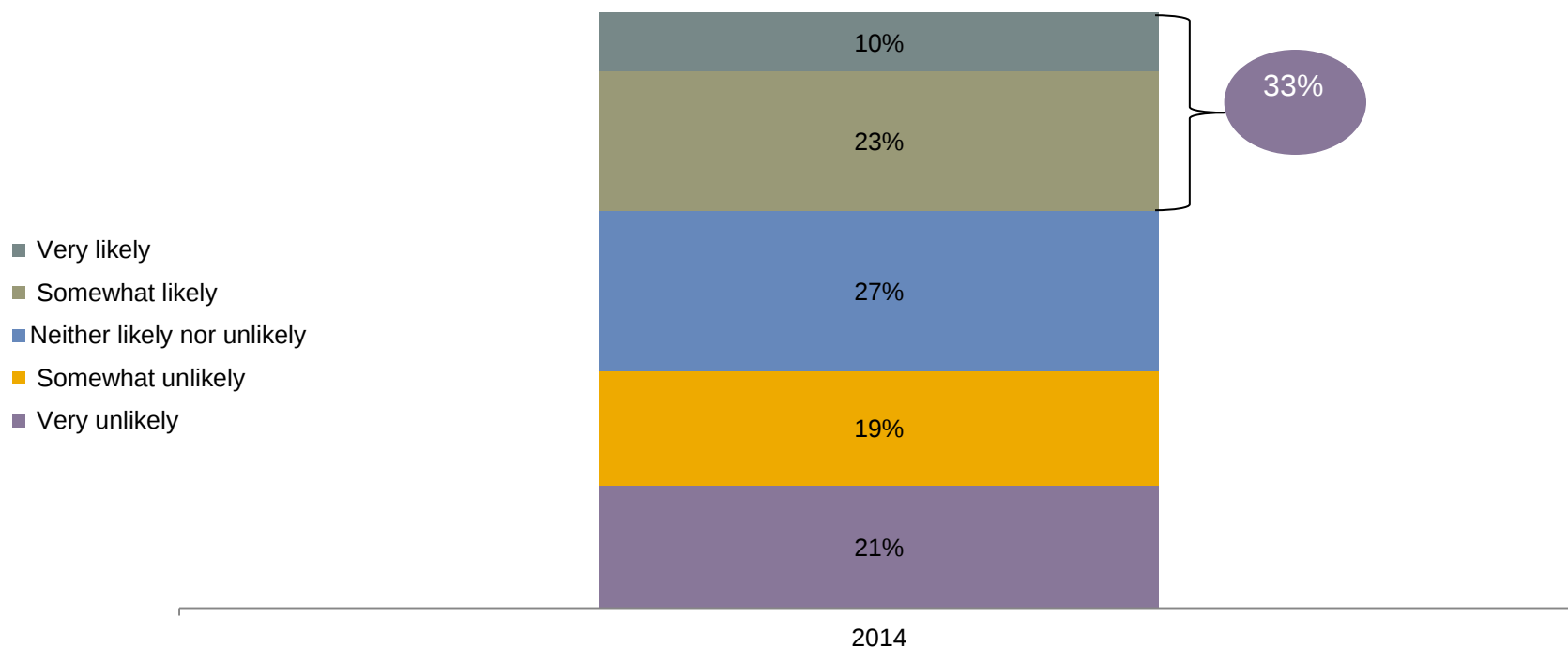
RANKED #1



One-third of shoppers are likely to share personal information in order to receive personalized offers during the holiday season.



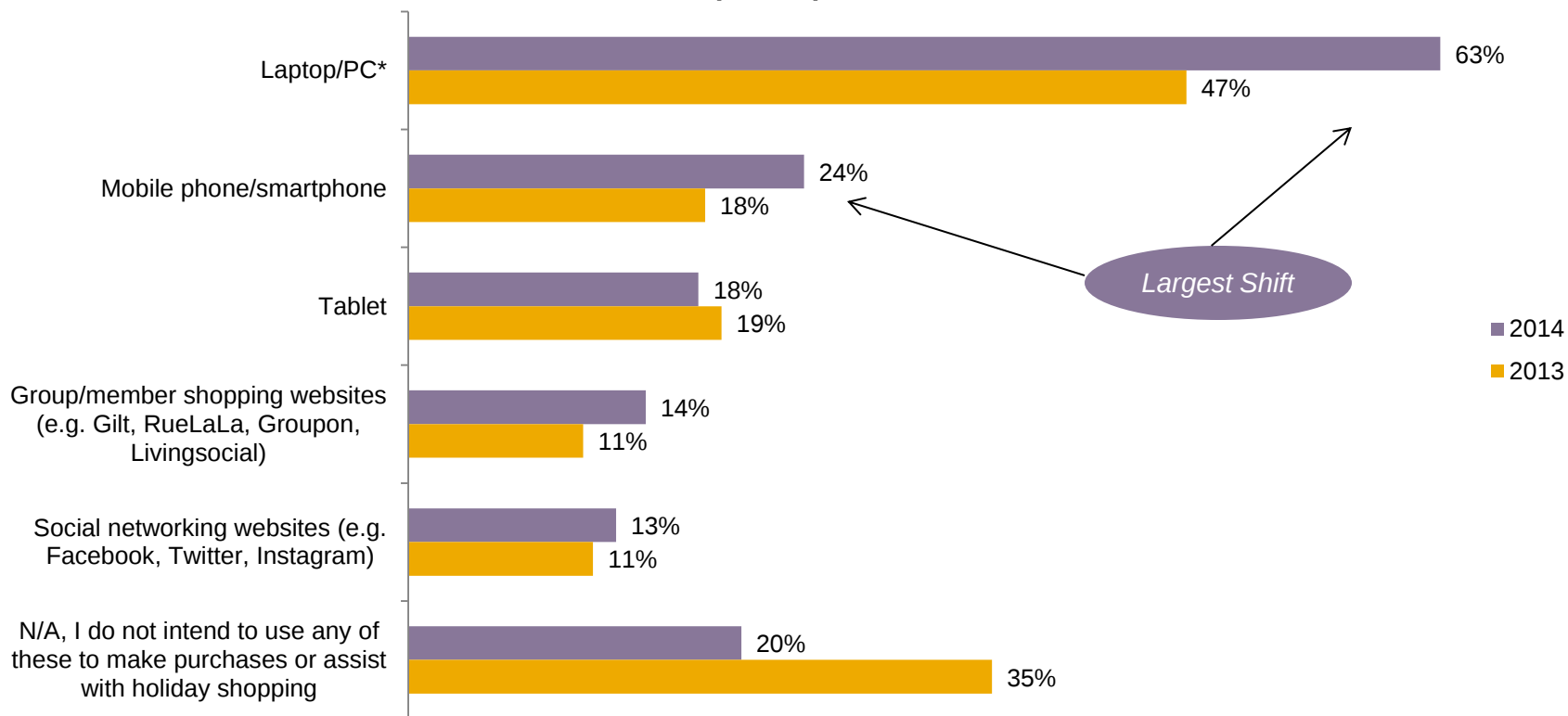
In order for retailers to be able to provide personalized/customized offers during the holiday shopping season, how likely are you to share more of your personal information (contact info, preferences)?



Overall, shoppers plan to use digital channels and services more to help in their holiday shopping. PC and mobile has the largest year over year increase.



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

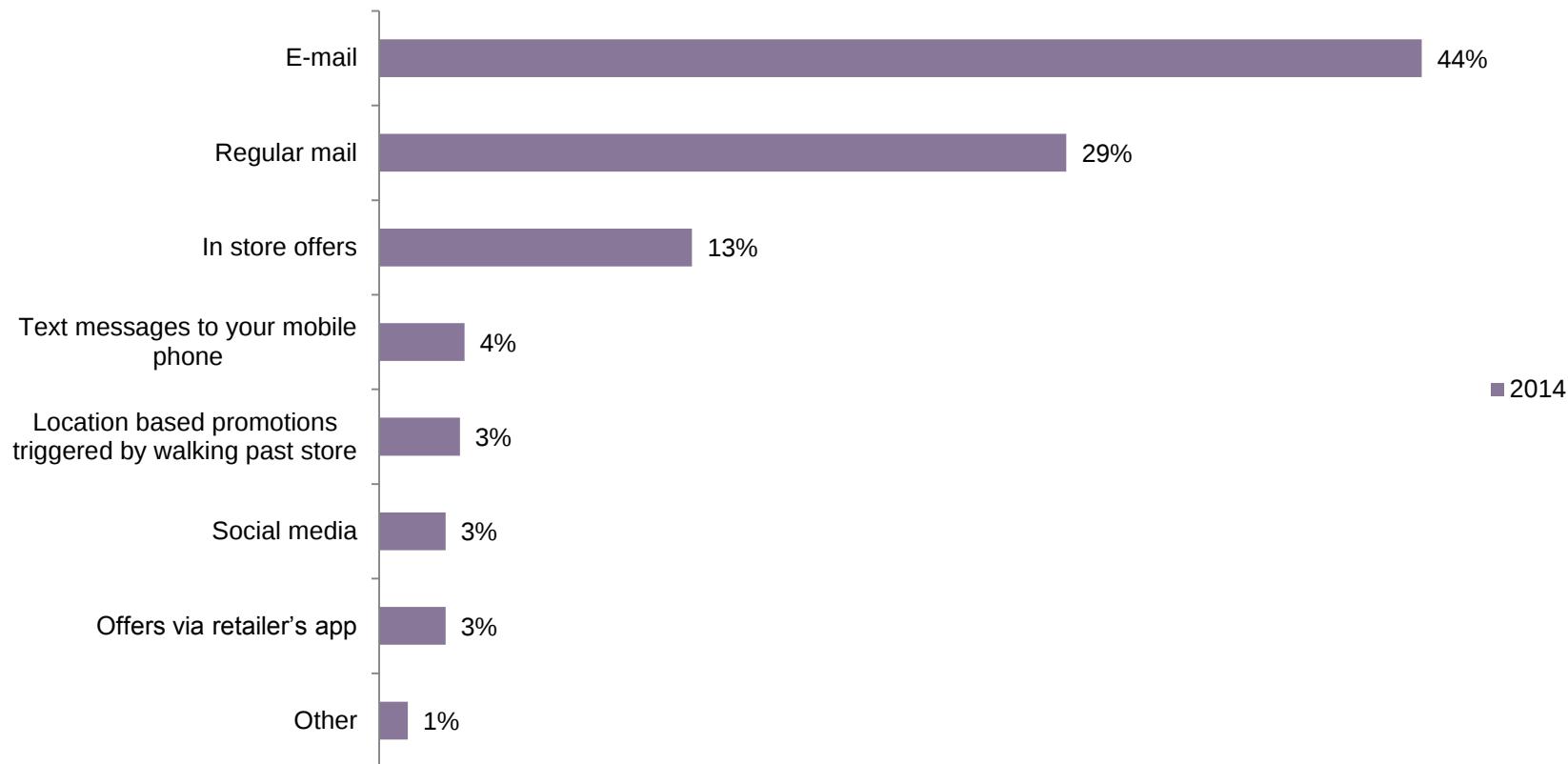


*Response not included 2011 or 2012

E-mail is by far the most preferred method for receiving personalized offers and coupons (44%), followed by regular mail (29%). New options like location based or social media offers are still developing.



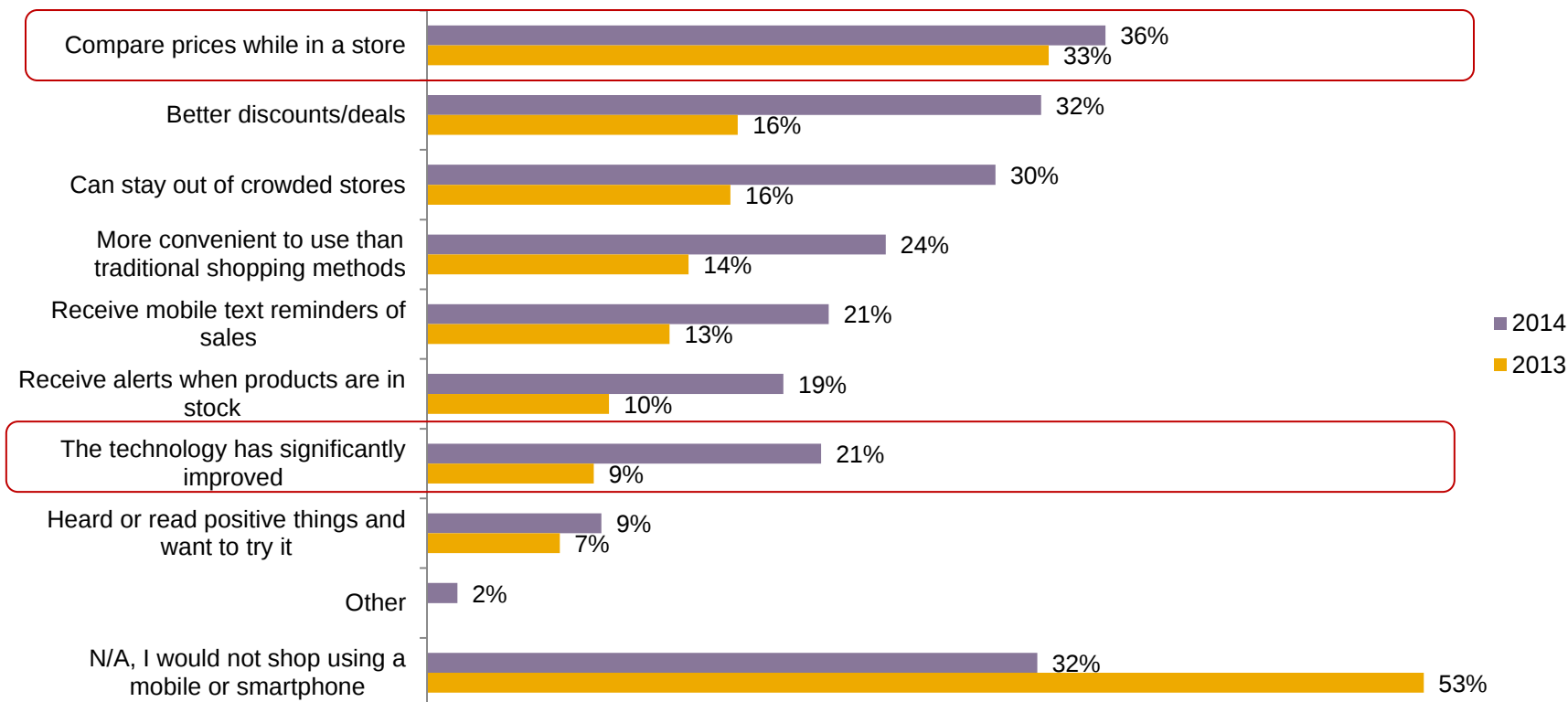
What is your preferred method for receiving personalized offers and coupons?



Shoppers use their mobile devices most to compare prices. In addition, more indicated a significant improvement in mobile capabilities.



Which statements best describe why you would shop using a mobile phone, smartphone or tablet?
Multiple responses.

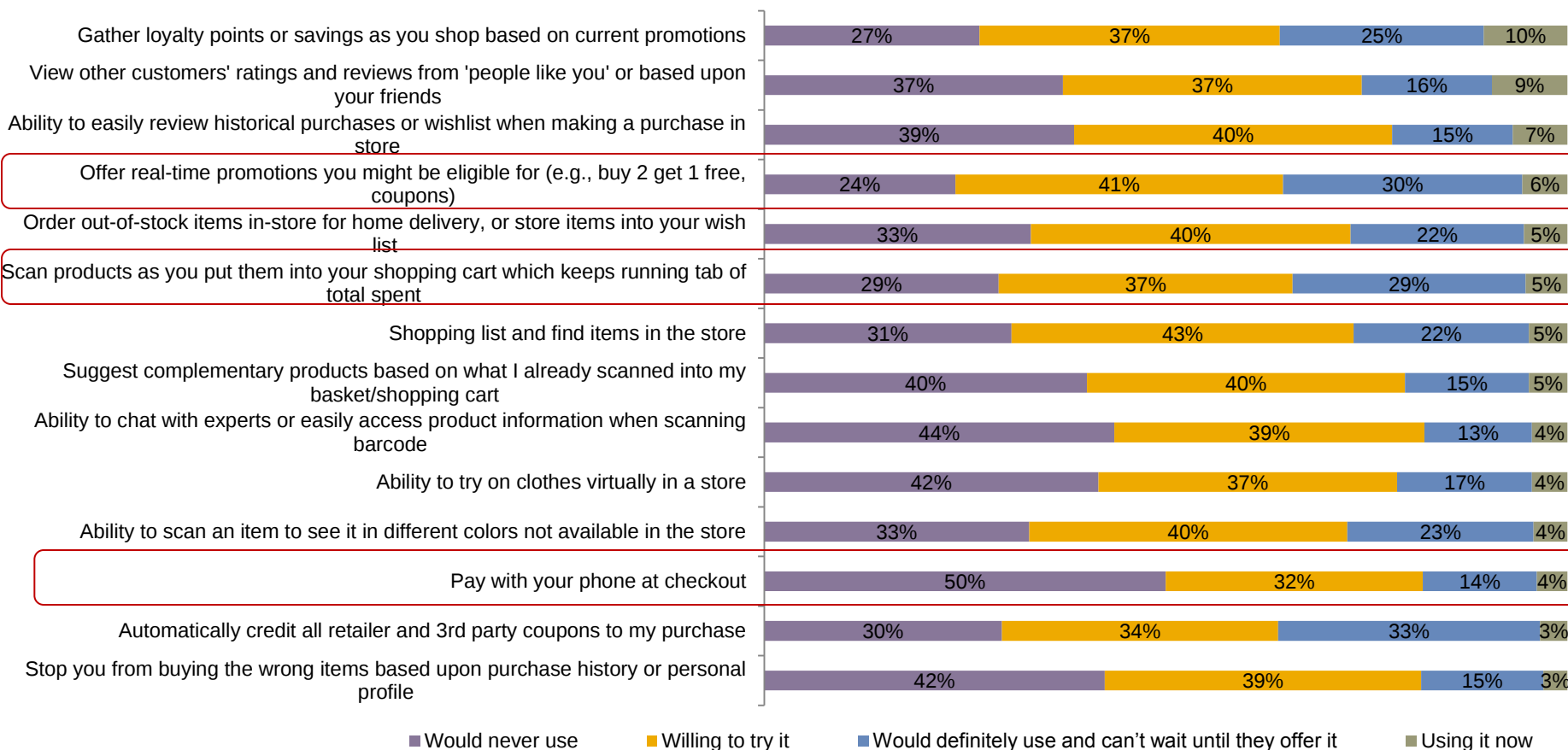


Shoppers are interested in using more services via their mobile phone while shopping in-store.



Which of the following services would you use in your shopping experience if offered through your mobile device while in-store:

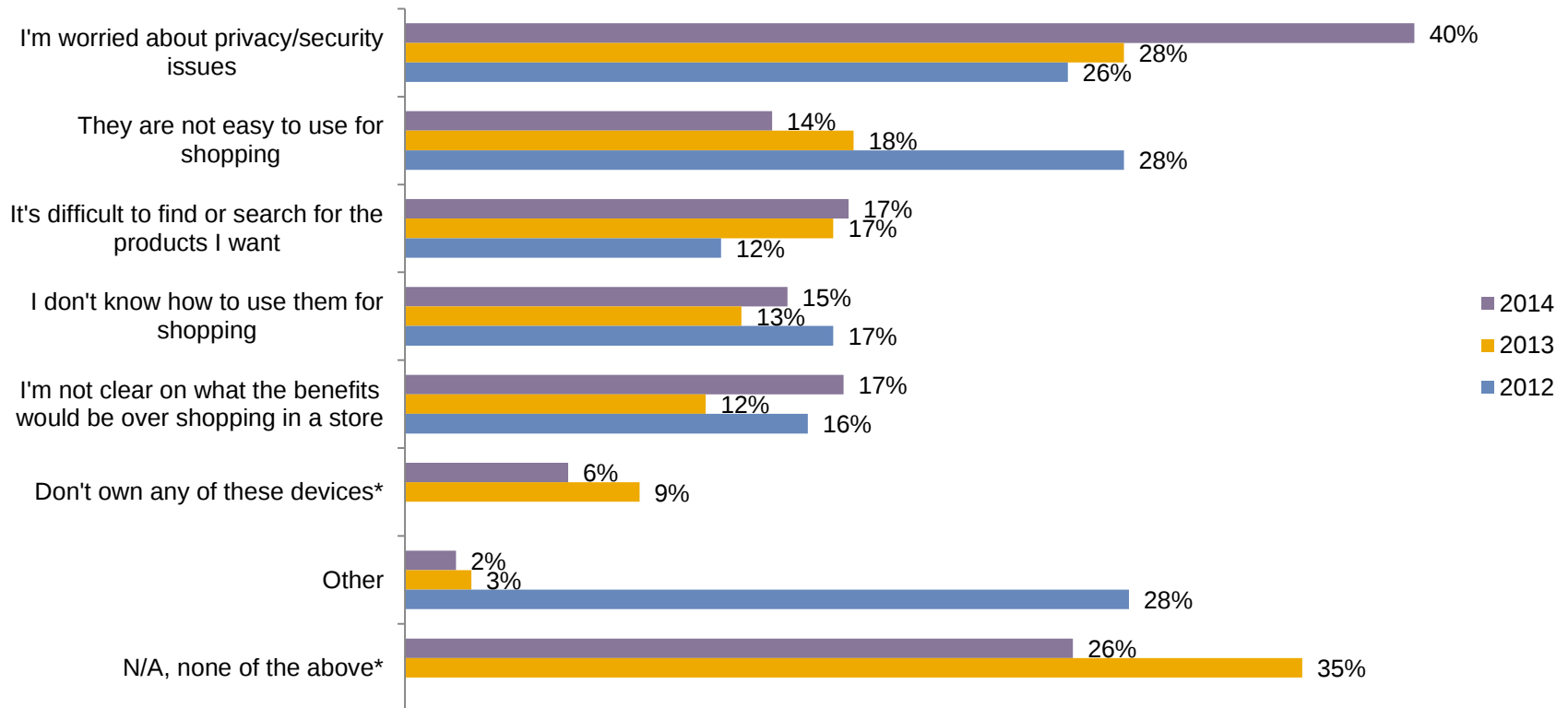
2014



40% of respondents said that they would not use a smartphone or tablet for shopping because they worry about privacy and security issues.



Which statements best describe why you would not shop using a mobile phone, smartphone or tablet?
Multiple responses.



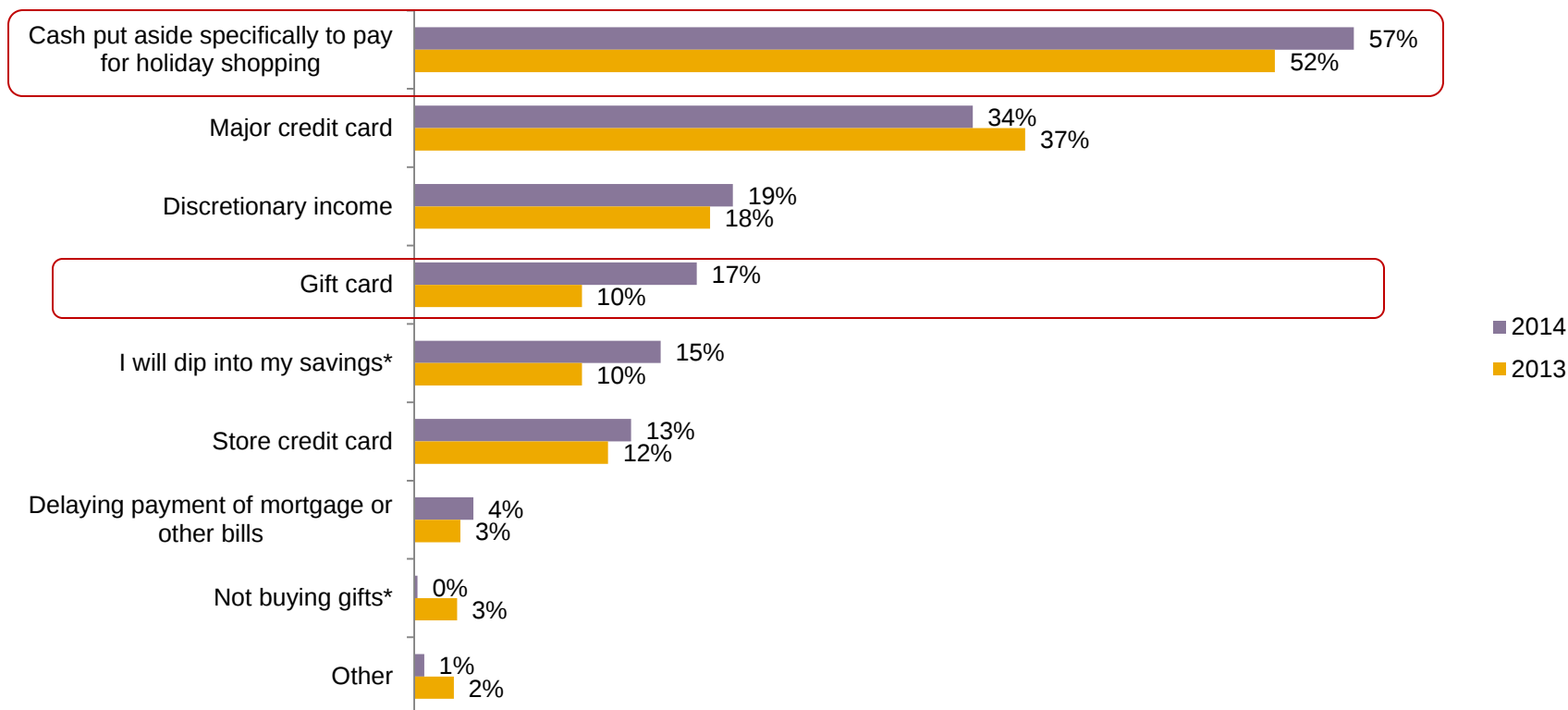
*Responses not included 2012

Most shoppers intend to pay for their holiday shopping with cash; however, 17% this year up from 10% in 2013 plan to use gift cards.



How do you intend to pay for your holiday shopping purchases this year?

Multiple responses.

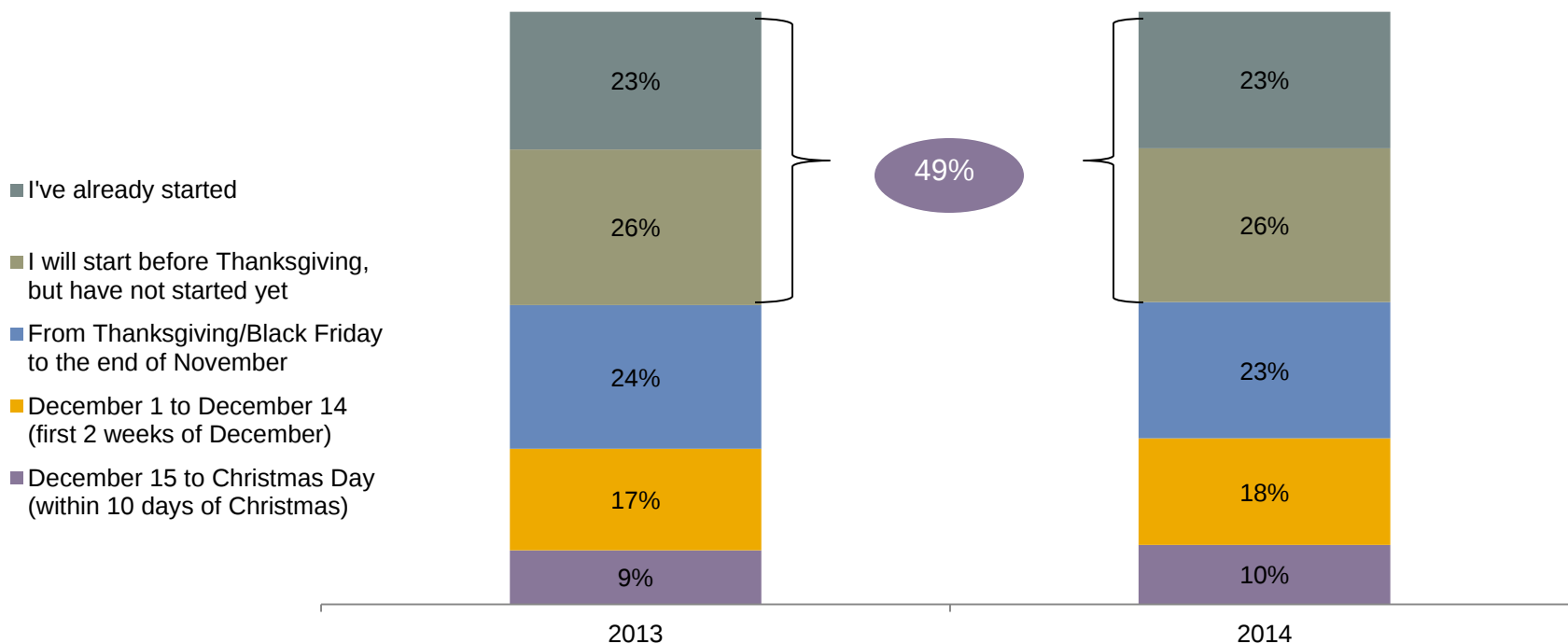


*Responses not included 2011

At the time of the survey, 49% of consumers had already started, or planned to start, the majority of their shopping in advance of Thanksgiving and Black Friday.



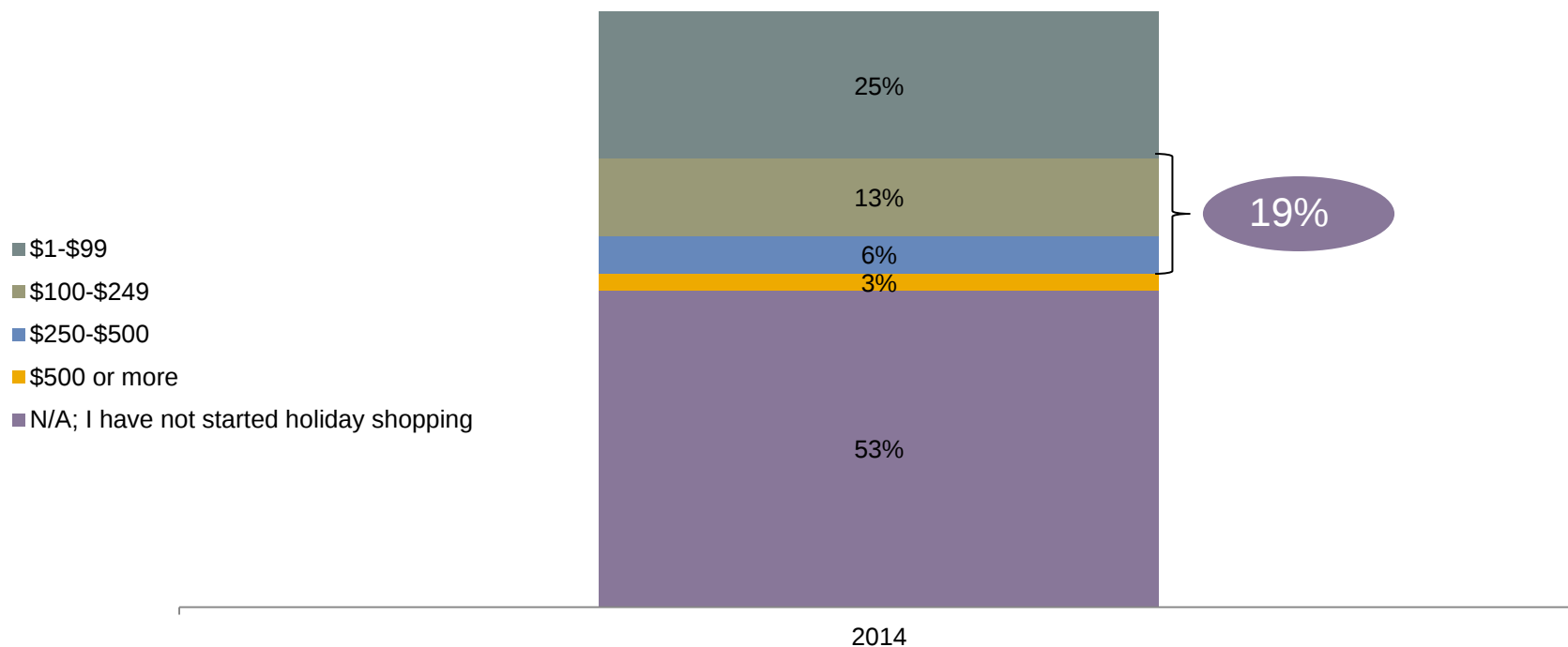
When do you expect to do most of your holiday shopping this year?



Nearly one-in-five (19%) said they had already spent between \$100 and \$500 on holiday gift purchases by mid-September.



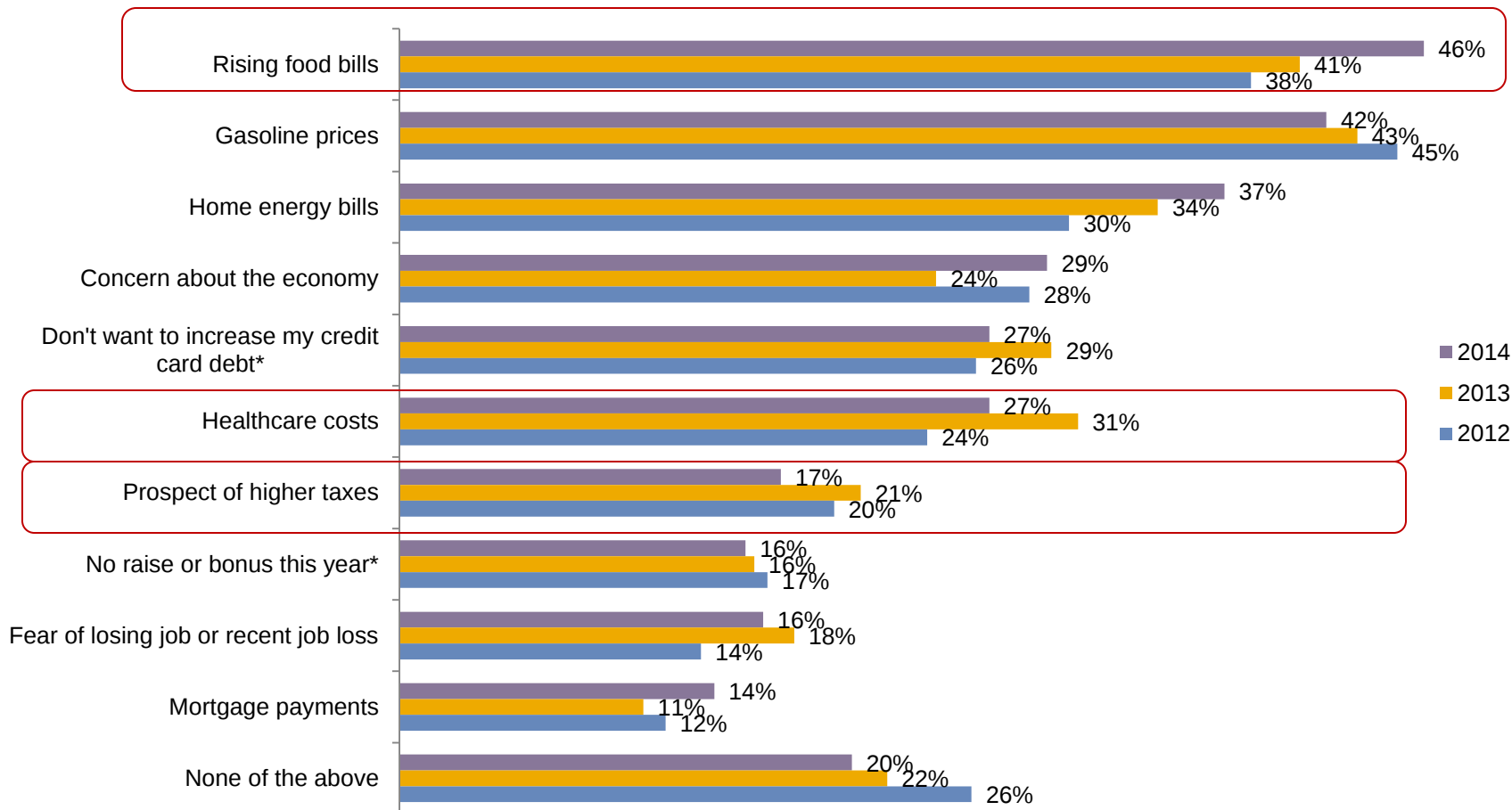
How much money have you already spent this year on holiday shopping?



The rising cost of food is the biggest driver adversely affecting holiday shopping this year; healthcare and higher taxes are less of concern this year.



Which of the following factors would negatively affect your holiday shopping spend this year?
Multiple responses.

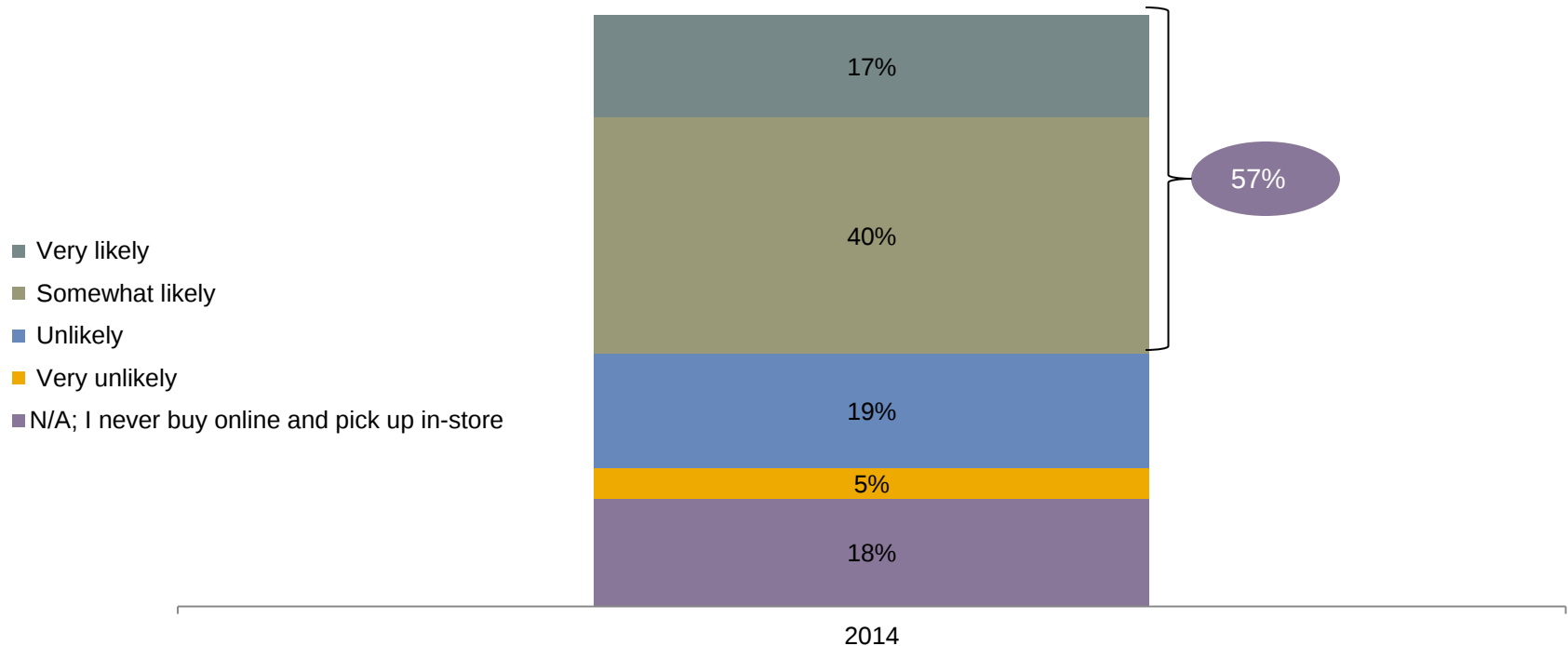


*Responses not included 2011

When purchasing an item online and having it shipped to a store or using the in-store pickup option, 57% of consumers said they would likely buy additional items that were not part of their original purchase.



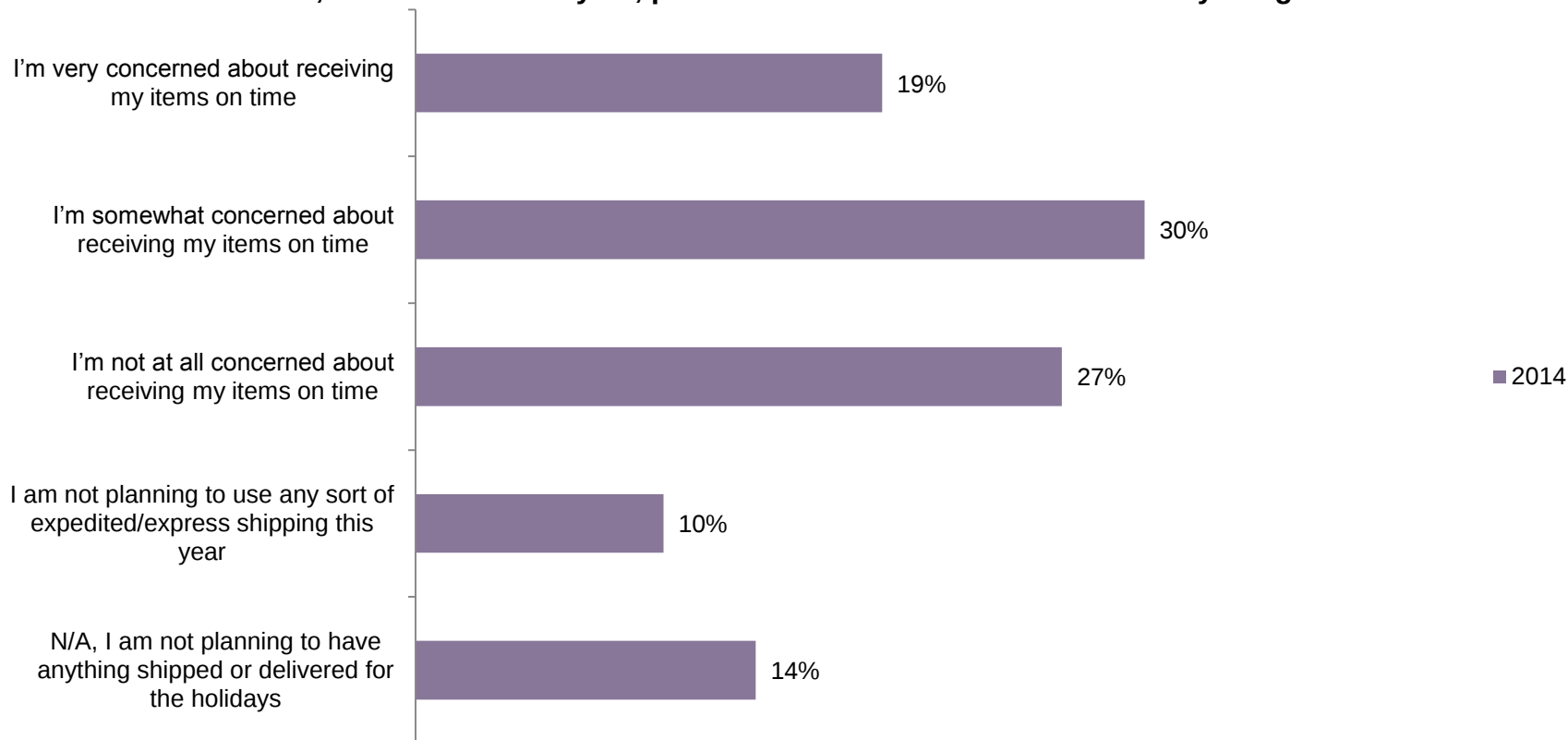
When you purchase an item online and have it shipped to a store or use the in-store pickup option, how likely are you to buy additional items (not part of your original purchase) during your in-store visit?





Nearly half of the survey respondents (49%) are concerned about receiving their deliveries from online purchases on time this year.

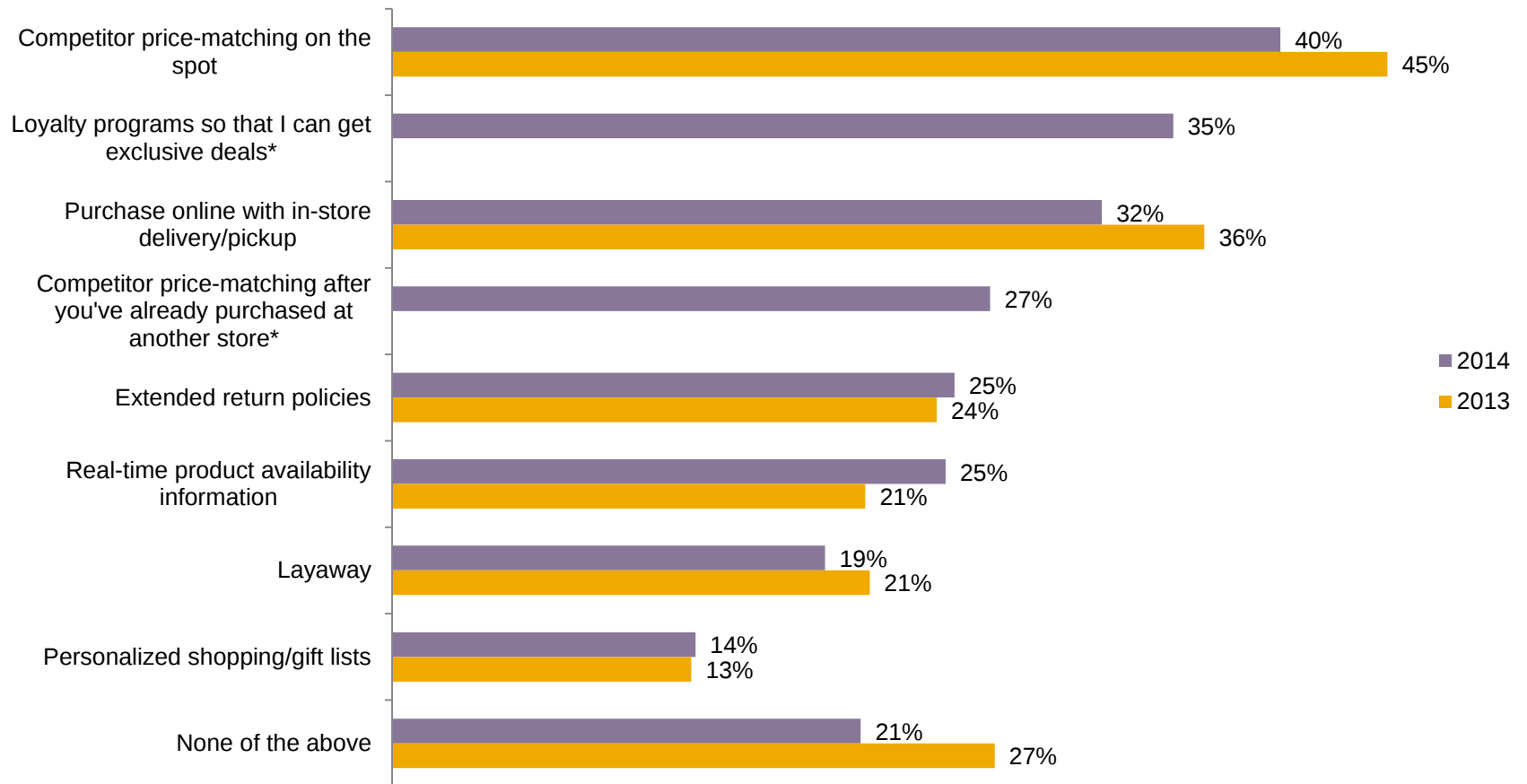
Given there can be a risk of retailers and shippers having difficulties with fulfilling deliveries on time for Christmas, as there was last year, please check the statement below that you agree with:



Competitor price-matching on the spot, loyalty programs for exclusive deals, and purchasing online with in-store delivery/pickup are the top holiday programs and benefits offered by retailers this year.



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



*Responses not included 2013



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Demographics & Methodology





Sample Demographics

Methodology

Accenture conducted an online survey using a representative sample of 500 U.S. consumers in September 2014.

Age	N=500
18 to 24	13%
25 to 34	19%
35 to 44	15%
45 to 59	24%
60 +	30%

Education	N=500
Some HS or less	2%
High School or GED	18%
Some college, technical school	33%
College graduate	33%
Post graduate	13%
I do not wish to answer	0%

Income	N=500
Under \$18,000	15%
Under \$35,000	25%
\$35,00 to \$49,999	16%
\$50,000 to \$74,999	20%
\$74,000 to \$99,999	12%
\$100,000 +	13%

Gender	N=500
Male	40%
Female	60%