

The 2015 Holiday Shopper

SPENDING PATTERNS BY THE DOLLAR

according to NRF

\$802⁴⁵

Average spent in 2014 on gifts, decorations, food and more, compared to **\$767.27** in 2013

\$131⁵⁹

Anticipated amount shoppers will spend on themselves and/or others for non-gift items, up from **\$126.37** in 2014

\$462⁹⁵

Anticipated 2015 spend on gifts for family members, up from **\$458.75** last year

**\$31.7
BILLION**

Total spent on gift cards in 2014, an increase of **28%** since 2006

GENERATIONAL DIFFERENCES

according to Synchrony Financial

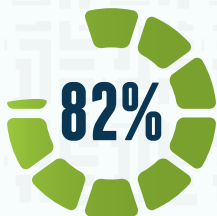
Millennials



Research products online



Research via mobile while in store



Say word-of-mouth is a key influencer to purchasing decisions

Want technology to make their shopping experiences frictionless



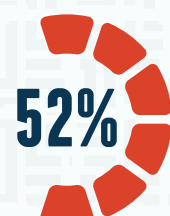
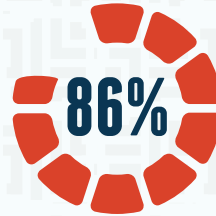
Preferred in-store experience

Care a great deal about price, and price drives many of their purchase decisions

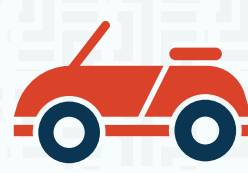


Price/Convenience trade-off

Baby Boomers



Crave customer service



Are much more likely to select a store based on the styles it carries

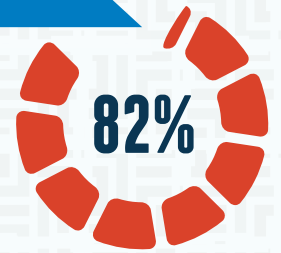
DIGITAL & OMNICHANNEL EXPECTATIONS



Expected online sales this holiday season, up from **\$69.7 BILLION** in 2014, according to eMarketer

WHAT'S MOST IMPORTANT TO ONLINE SHOPPERS, according to NRF?

LOW PRICES	90%
FREE SHIPPING	86%
FLEXIBLE RETURN POLICY	80%
EASY-TO-USE WEBSITE	78%



Expect a retailer's prices to be the same in-store and online, up from **69%** in 2014, according to Accenture

2014 Top 5 METRO MARKETS, BASED ON SHOPPER VISITS



When examining year-over-year trends for unique locations, remember to review the impact of other factors on changes including promotional efforts, weather events and store openings/closings.

(ShopperTrak 2013-2014 YOY Analysis, NRF Calendar Months November & December)

2014 Top 3 IN-DEMAND CATEGORIES, BASED ON PERCENT OF TOTAL SHOPPER VISITS



(ShopperTrak 2014 Category Analysis, NRF Calendar Months November & December)

The experience retailers provide shoppers throughout their path-to-purchase is something that shoppers will evaluate, accept or reject, and ultimately influence their decision on whether to make a purchase.