



American Express Spending & Saving Tracker

Holiday Shopping

Prepared by:

echo

An Ebiquity Company

GLOBAL RESEARCH PROTECTING BRANDS AND REPUTATION

Research Method

The **American Express Spending & Saving Tracker** research was completed among a random sample of 1,500 adults, including the general U.S. population, as well as an Affluent demographic, defined as having a minimum annual household income of \$100,000.

Interviewing was conducted by **Echo Research** between October 17 and 19, 2012. Overall the results have a margin of error of ± 2.5 percentage points at the 95% level of confidence (or ± 4.1 percentage points among Affluents).

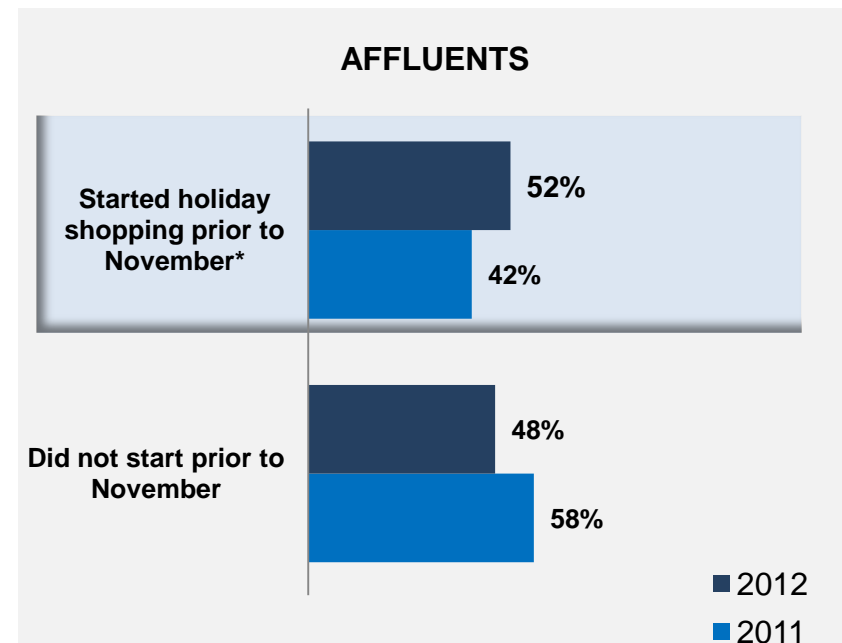
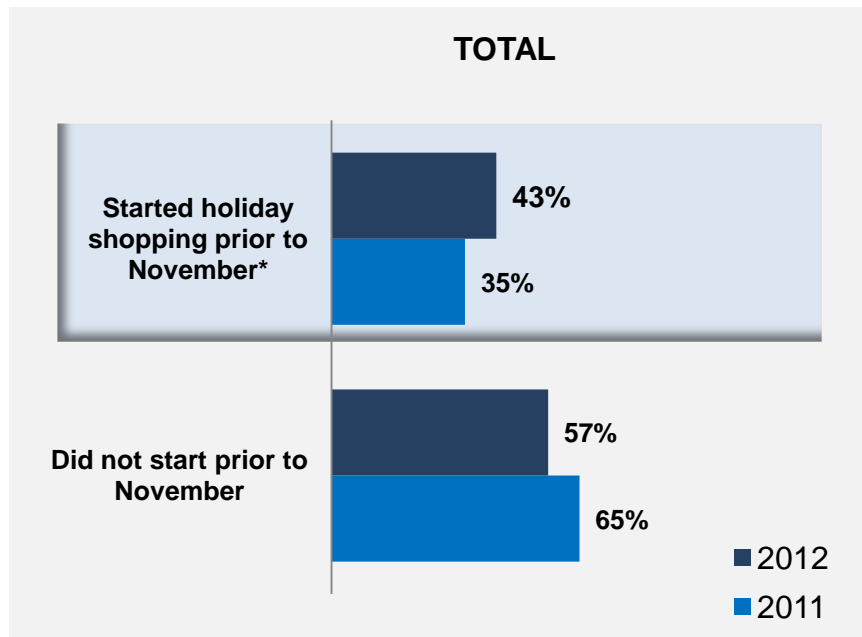


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Many Holiday Shoppers Got a Jump Start on Holiday Shopping

More than four in ten (43%) consumers began their holiday shopping prior to November – up significantly from an last year (35%).



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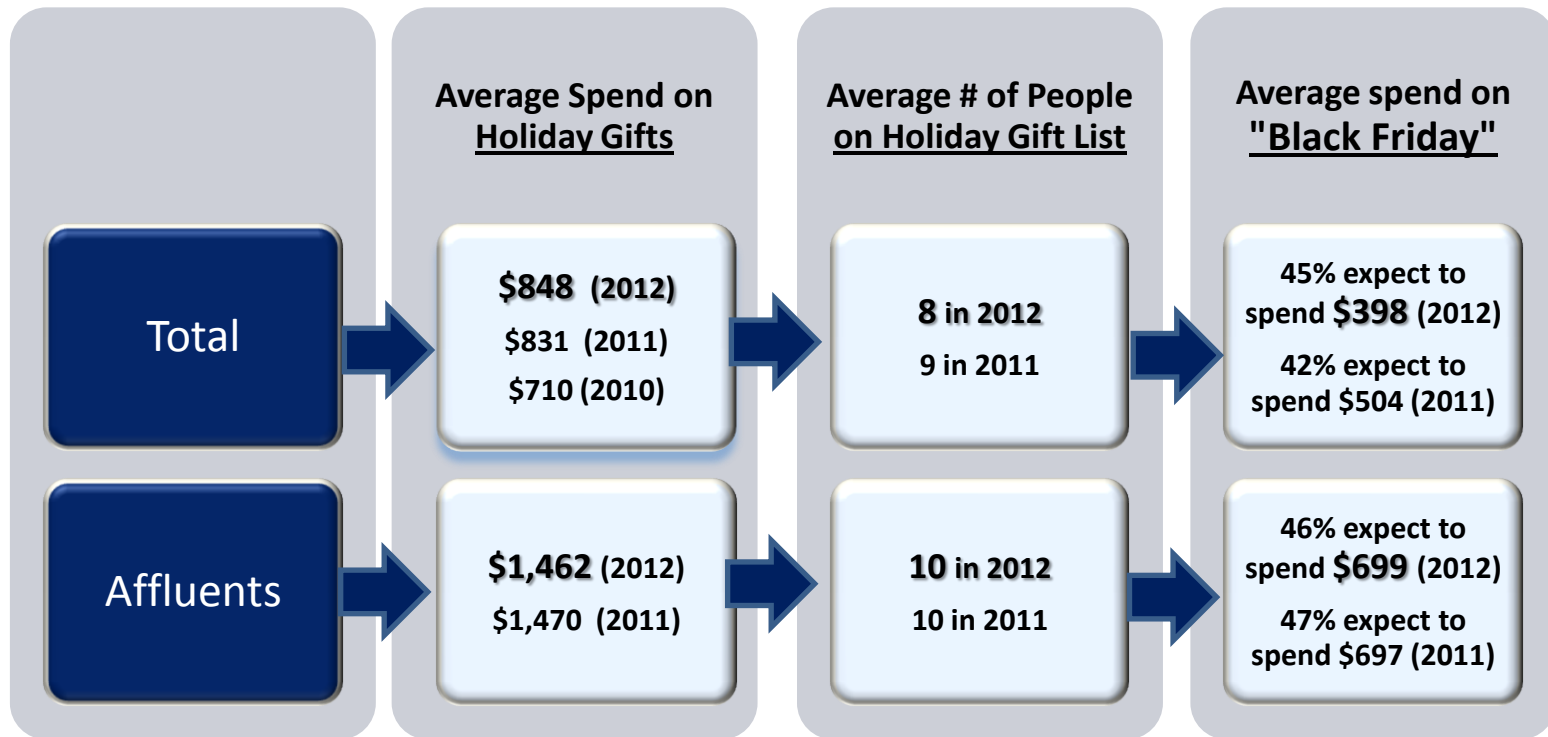
* Responses grouped: October 2012, between July and September 2012, between April and June 2012, between January and March 2012, and prior to this year.
Q. When did you begin your holiday shopping? Base: Total Respondents



Average Overall Holiday Gift Spending is Up in 2012

Consumers expect to spend an average of \$848 on holiday gift purchases this year (up from \$831 in 2011, and \$710 in 2010). On average, consumers have 8 people on their holiday gift list (versus 9 in 2011).

Average spend on "Black Friday" is expected to be lower (\$398 vs. \$504) this year, however.

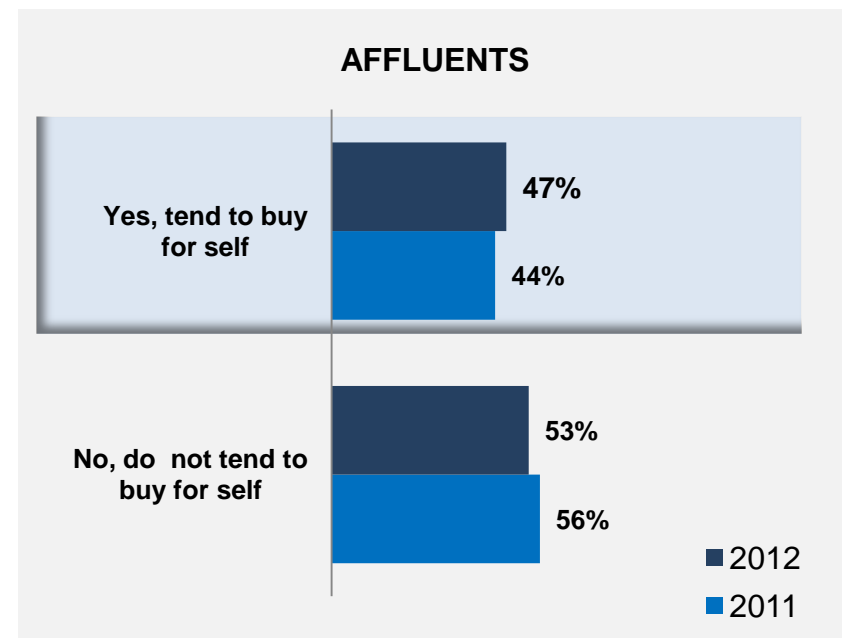
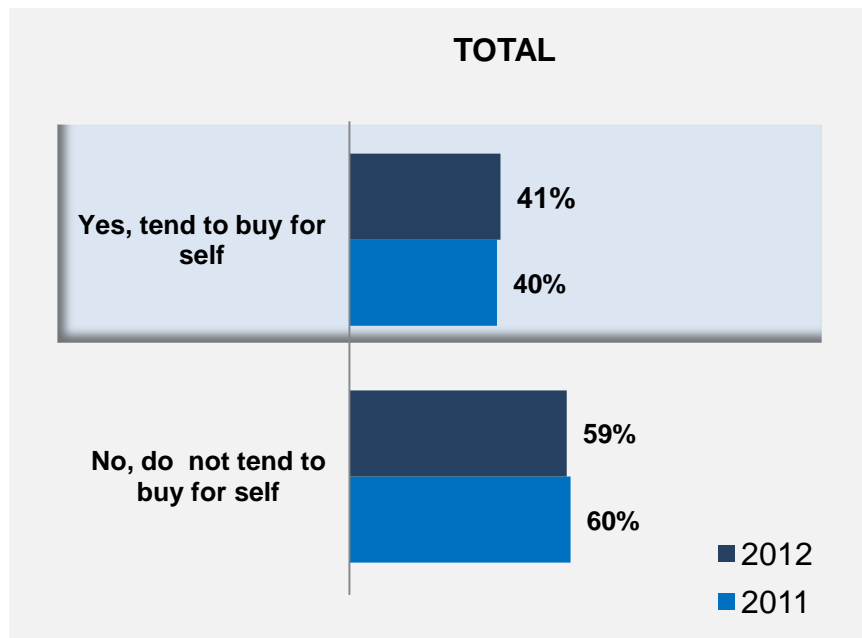


- Q. How much do you expect to spend overall on holiday gifts this year? BASE: Total respondents
- Q. How many people are on your holiday gift list this holiday?
- Q. Will you be shopping on any of the following days?
- Q. How much do you plan to spend on holiday shopping this "Black Friday"? Among those shopping on "Black Friday" for the holidays this year



Many Holiday Shoppers Tend to Buy for Themselves When Shopping for Others

More than four in ten (41%) consumers tend to buy for themselves while out holiday shopping for others.



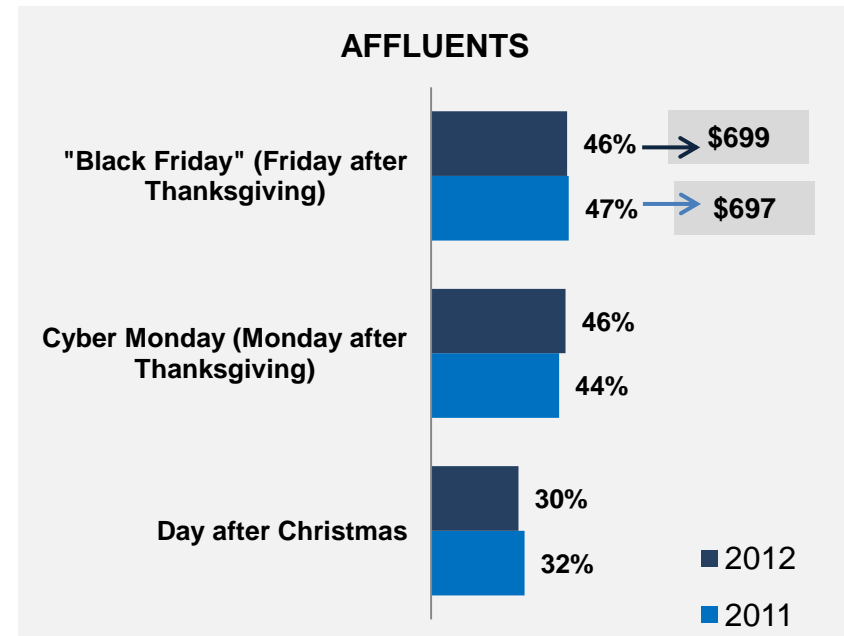
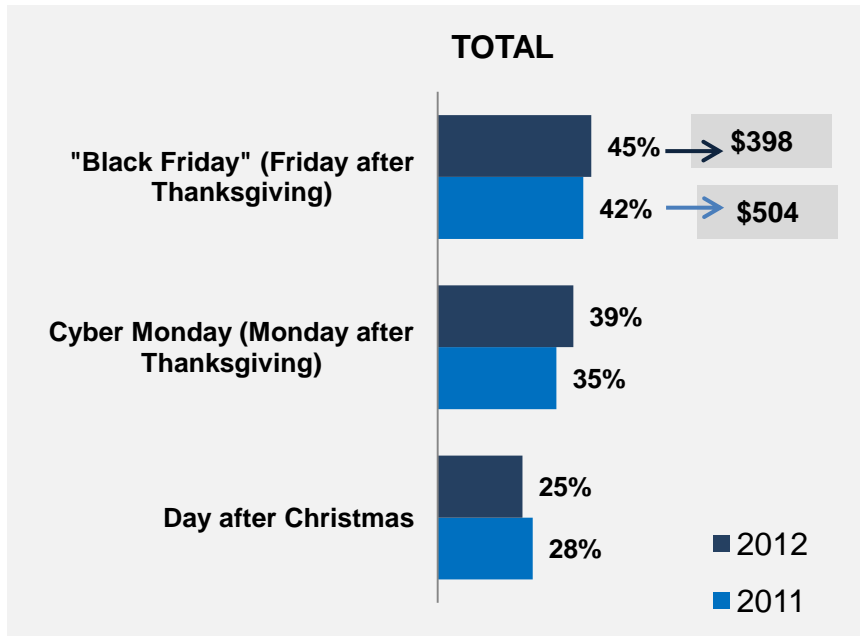
Q. Do you tend to buy for yourself while out holiday shopping for others? BASE: Total respondents



Many Consumers Intend to Shop on “Black Friday” this Year

More than four in ten (45% - up from 42% in 2011) consumers will be shopping on “Black Friday” – the day after Thanksgiving this year.

On average, consumers indicate a decrease in spending on holiday shopping this “Black Friday” in contrast to 2011 (\$398 vs. \$504).



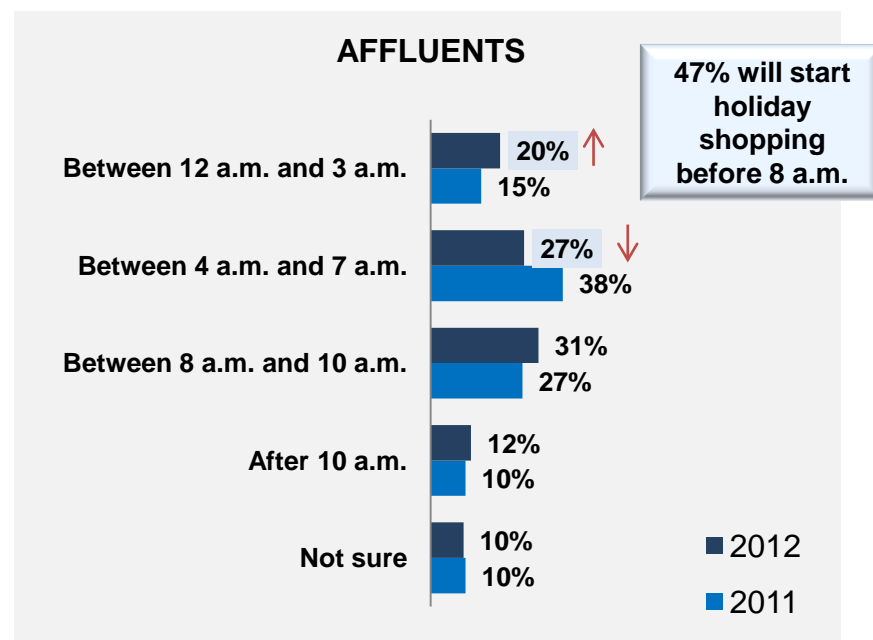
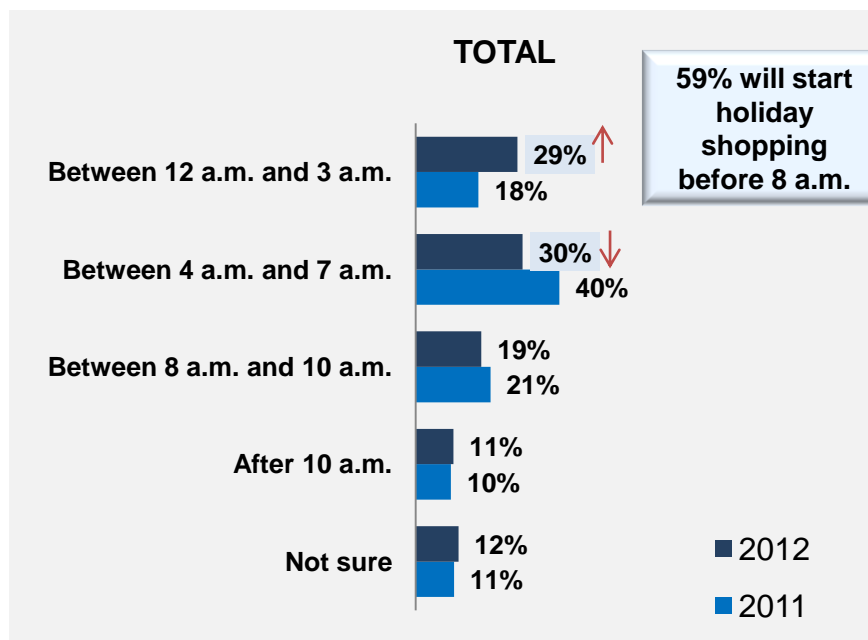
Q. Will you be shopping on any of the following days? Among those shopping for the holidays this year
 Q. How much do you plan to spend on holiday shopping this "Black Friday"? Among those shopping on "Black Friday" for the holidays this year year



More Consumers Plan to Head out at the Top of the Morning this “Black Friday” versus Last Year

About six in ten (59%) “Black Friday” shoppers say they plan to *start* before 8 a.m. –

- 29% between 12 a.m. and 3 a.m. (up from 18% in 2011), and
- 30% between 4 a.m. and 7 a.m. (down from 40% in 2011).



Q. What time do you plan to start your holiday shopping this “Black Friday”? Among those shopping on “Black Friday” for the holidays this year



Most Consumers Plan to Stretch Holiday Shopping Dollars

More than eight in ten (81%) consumers are planning to be resourceful with their holiday shopping dollars this year (86% in 2011).

- The leading way consumers will stretch their holiday shopping dollars will be shopping for clearance/sale merchandise (54% - down from 58% in 2011).
- Fewer consumers will resource coupons/ store promotions this holiday season (43% vs. 51% in 2011).

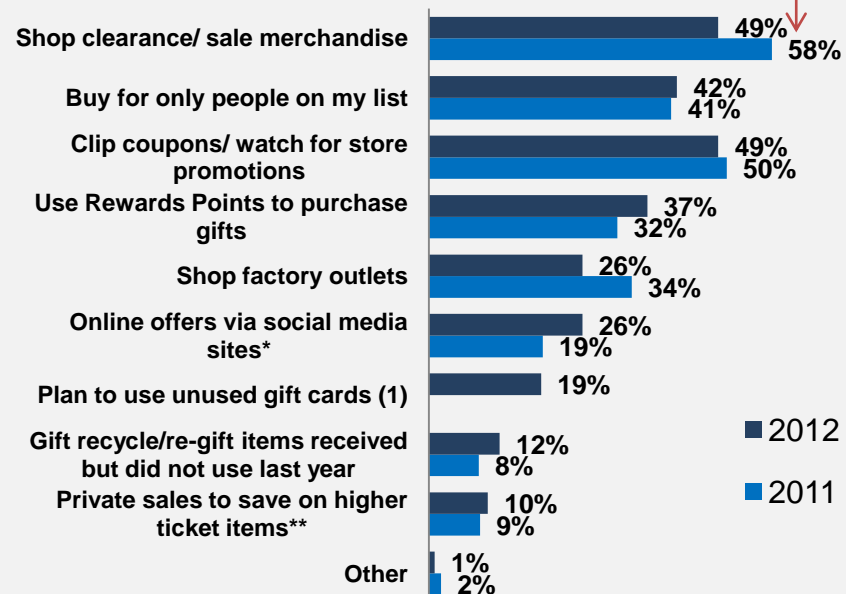
TOTAL

81% plan to be resourceful and stretch their holiday dollars (84% in 2011)



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82% plan to be resourceful and stretch their holiday dollars (86% in 2011)



(1) New in 2012

* (e.g. Facebook, Twitter, Living Social, Groupon, Foursquare)

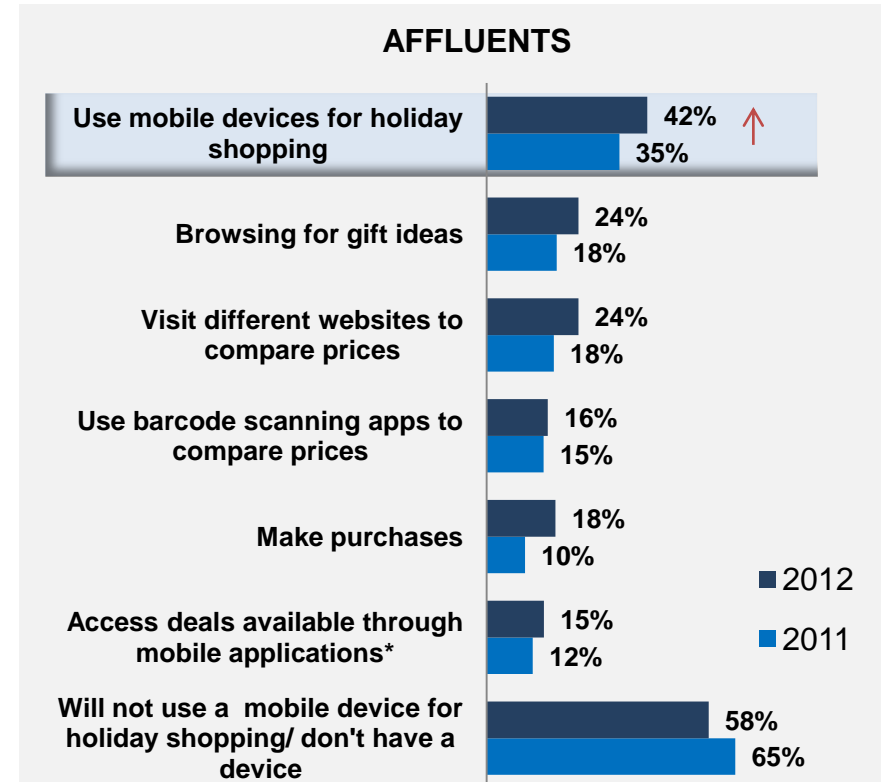
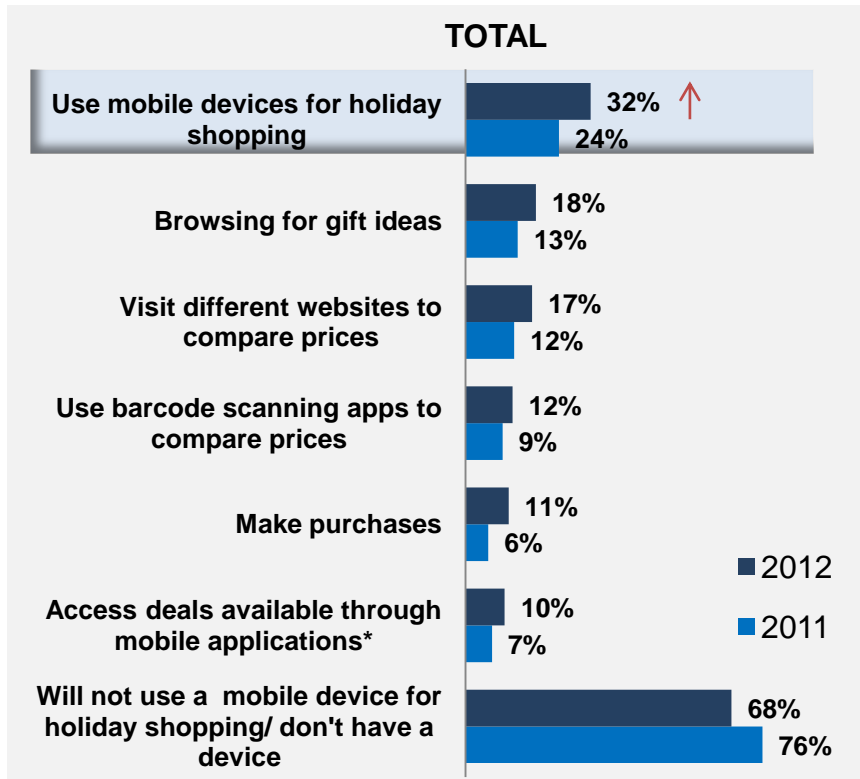
** (e.g., Ruelala, Gilt, HauteLook)

Q. How do you plan to be resourceful and stretch your holiday shopping dollars this year? BASE: Total respondents



More Consumers are Looking to their Phones for Holiday Shopping than Last Year

More consumers are using their mobile device for holiday shopping this year versus 2011 (32% vs. 24%); browsing for gift ideas and comparing prices are the top two uses (18% and 17%, respectively).



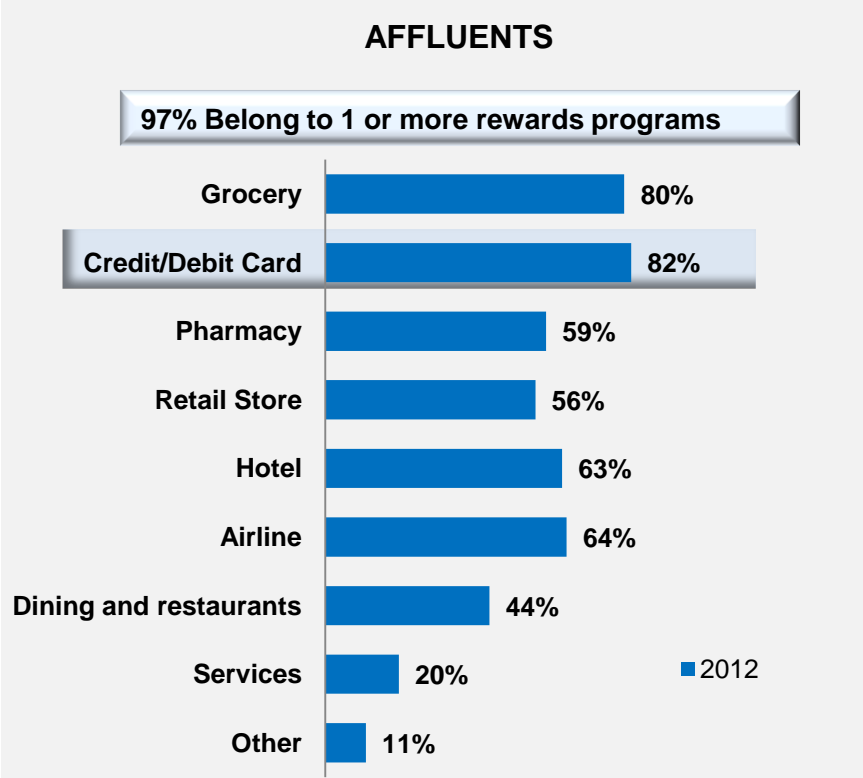
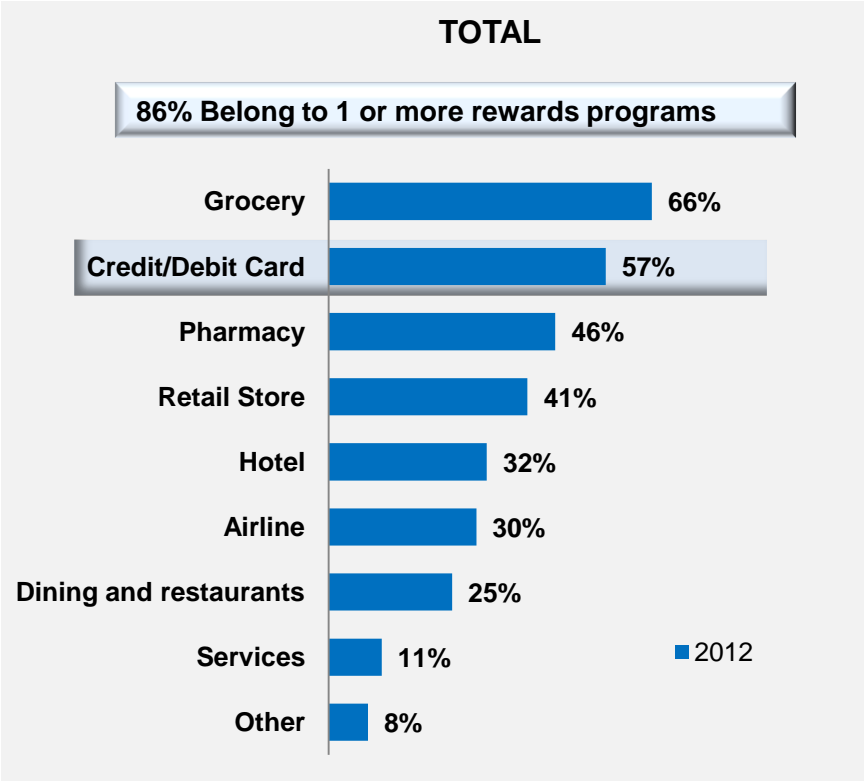
* (i.e., foursquare, Groupon, Facebook)

Q. Which of the following ways do you intend to use your cell phone or mobile device for holiday shopping this year? BASE: Total respondents



Most Consumers Belong to Credit or Debit Card Loyalty Programs

More than one half (57%) of consumers belong to a credit or debit card loyalty program.



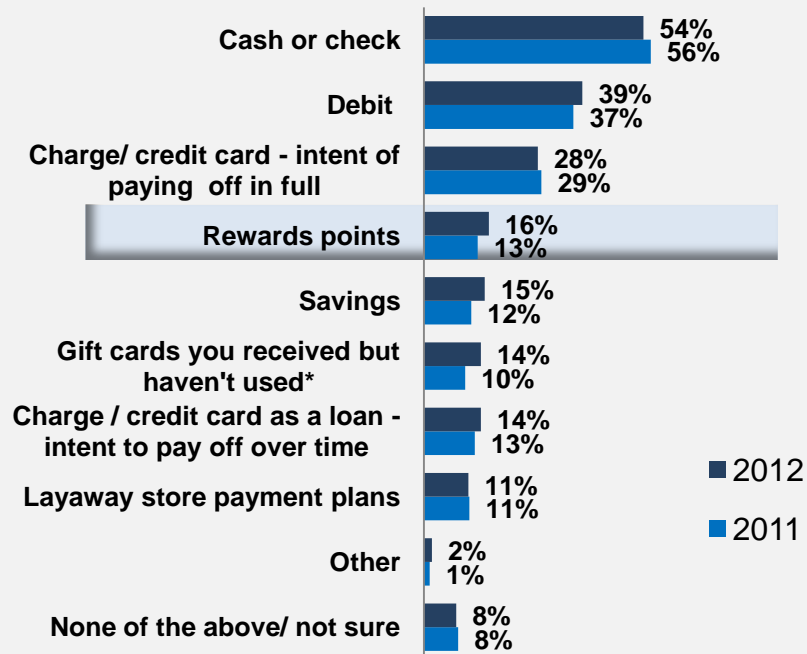
Q. How many rewards/loyalty programs do you belong to for each type listed below? BASE: Total respondents



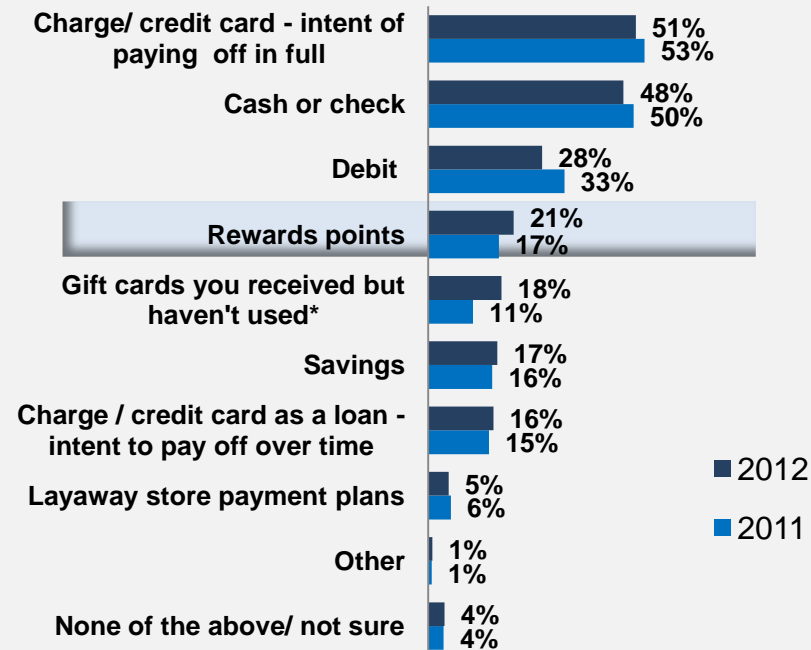
More Consumers are Using their Rewards Points for Holiday Shopping than Last Year

Overall, most consumers will use cash or check to pay for their holiday gift purchases (54%), followed by debit card (39%), charge/ credit cards with intent to pay off in full (28%), and rewards points (16% - up from 13% in 2011).

TOTAL



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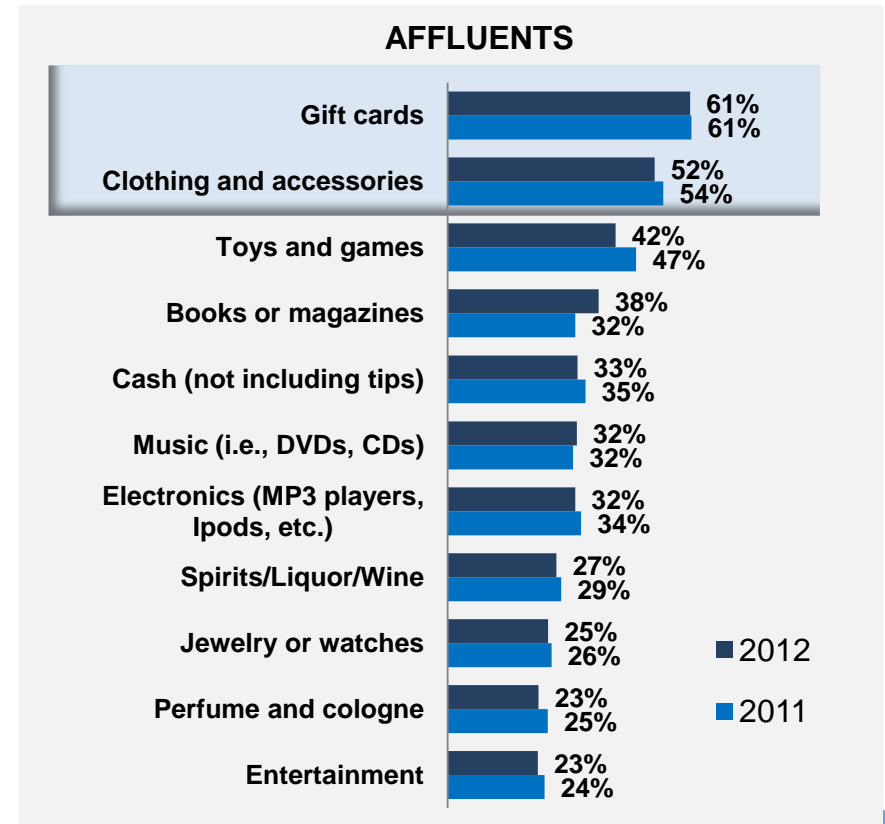
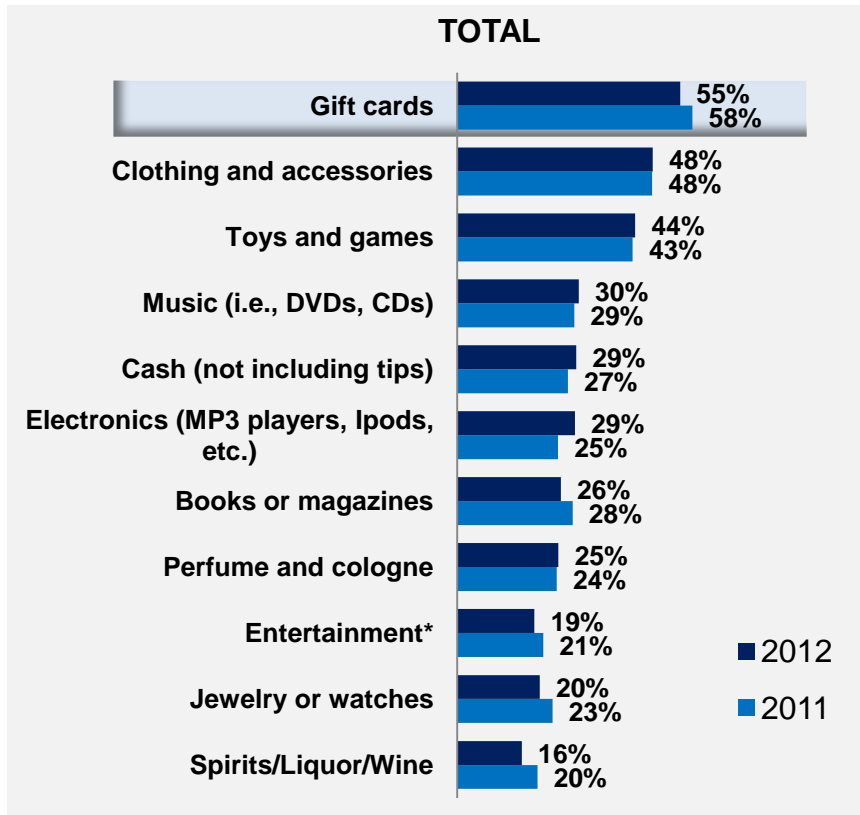


* (in other words someone gave you a gift card and now you're using it to buy gifts for others vs. something for yourself)
 Q. How do you plan to pay for your holiday shopping?



Gift Cards are the Most Popular to Give this Holiday Season

Most consumers will likely give a gift card this year (55% vs. 58% in 2011), followed by clothing/accessories (48%), and toys and games (44%).



* (i.e., movie tickets, theatre etc.)

Q. Which of the following types of items will you be likely to give as gifts this year? Top 11 gifts out of 23 rated shown above

