

FUN



FACTS

❁ WHAT ARE THE TOP HOLIDAY SHOPPING DAYS?

- 1) Black Friday, November 29
- 2) Cyber Monday, December 2
- 3) Super Saturday, December 21
- 4) Christmas Eve, December 24

❁ WHEN WILL CONSUMERS EXPECT TO COMPLETE THEIR HOLIDAY SHOPPING?

By the 3rd week in December, 83% of consumers plan to complete their holiday shopping:

Between Thanksgiving Day and Cyber Monday: 21%

By the 2nd week in December: 28%

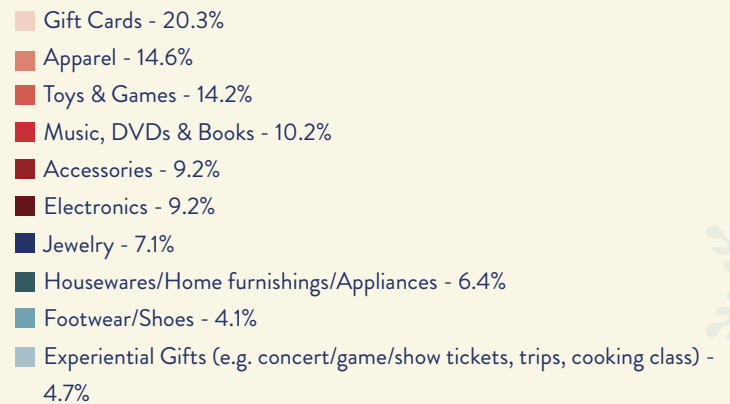
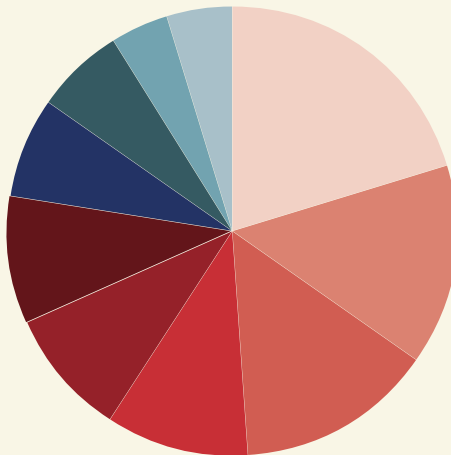
Weekend before Christmas or later: 17%

- December 21-23: 14%
- Christmas Eve, December 24: 2%

❁ WHAT'S THE CONSUMER BUYING?

Gift cards are less popular than last year (20.3% vs. 21.3%), while experiential gifts take a larger share than last year (4.7% vs. 3.6%)

2013 HOLIDAY GIFT BUYING INTENTIONS



❁ WHAT ARE THE BEST POSITIONED RETAIL STOCKS THIS HOLIDAY SEASON?*

KORS (Michael Kors Holdings Ltd)
LTD (L Brands Inc)
ROST (Ross Stores Inc)
TJX (The TJX Companies, Inc.)

* Source: Morgan Stanley





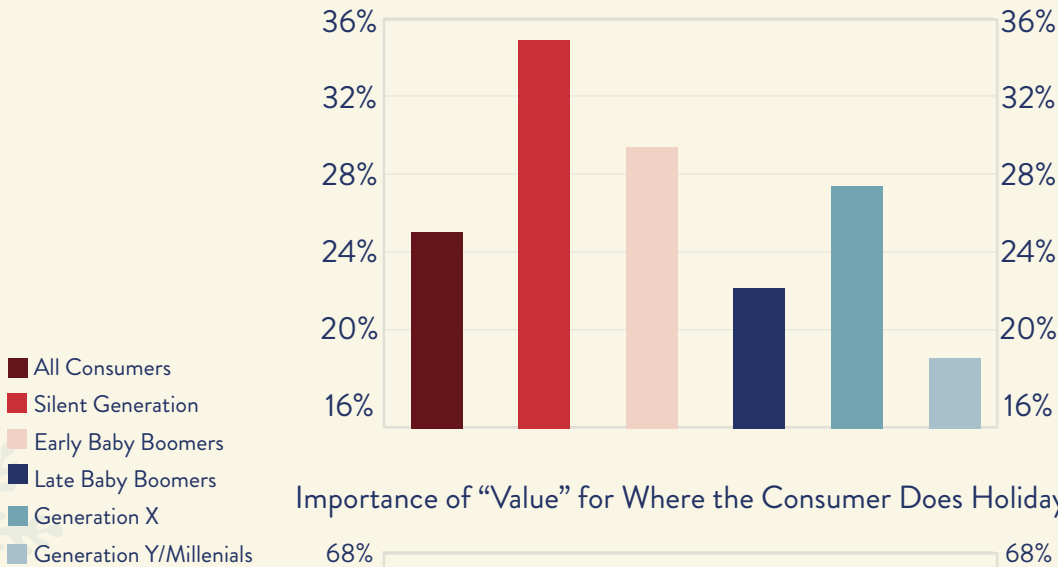
❁ WHAT IMPACTS HOLIDAY SHOPPING DECISIONS?

- 1) Seasonal Discounts
- 2) Finding the Perfect Gift
- 3) Gift Practicality

❁ WHAT IS THE BIGGEST CONSIDERATION WHEN DETERMINING WHERE TO SHOP?

- 1) Value - 55.4%
- 2) Convenience - 24.8%
- 3) Broadest Selection - 8.9%
- 4) Shopping Experience - 6.9%
- 5) Return Policy - 4.0%

Importance of "Convenience" for Where the Consumer Does Holiday Shopping



Importance of "Value" for Where the Consumer Does Holiday Shopping

