



## 2014 AAA Consumer Pulse™ Survey: Holiday Shopping

2008 Survey Fielded: November 10 - 18, 2008  
 2009 Survey Fielded: October 14 - 22, 2009  
 2010 Survey Fielded: October 20 - 24, 2010  
 2011 Survey Fielded: October 12 - 15, 2011  
 2012 Survey Fielded: October 25 - 27, 2012  
 2013 Survey Fielded: November 1 - 4, 2013  
 2014 Survey Fielded: October 20 - November 3, 2014

### Background & Methodology

- Conducted 1,210 surveys among residents in Florida, Georgia, and Tennessee, with 1,113 planning to purchase gifts during the 2014 holiday season.

- Fielding took place October 20 - November 3, 2014
- Utilized a proprietary online market research panel
- Total is weighted by gender and age within state

- Key Measures

- Holiday Shopping Plans
- Types of Expected Purchases
- Expected Spending Amount
- Plans to Change Shopping Habits

- Key Findings

- Nine in ten (91%) residents plan to purchase gifts during the 2014 holiday season.
- Residents plan on spending more for gifts this year (14%, compared to 10% in 2013) due to their present situation and feelings toward the economy.
- Apparel and Accessories (71%), Gift Cards/Gift Certificates (65%), and Books (39%) are the most planned gift purchases for the 2014 holiday season.
  - Additionally, fewer residents plan to purchase Toys (38%) and Travel (9%) this year compared to 2013.

### Detailed Findings:

#### 1. Do you plan to purchase gifts during the 2014 holiday season?

	2008	2009	2010	2011	2012	2013	2014
<i>Base (N =)</i>	n/a	n/a	n/a	604	629	1,226	1,210
Yes	-	-	-	93%	92%	93%	91%
No	-	-	-	7%	8%	7%	9%

#### 2. When do you expect to begin your holiday shopping?

	2008	2009	2010	2011	2012	2013	2014
<i>Base (N =)</i>	536	603	653	566	581	1,139	1,113
Before November	-	36%	34%	31%	36%	27%	24%
The first two weeks of November (November 1 - 14)	-	18%	12%	15%	15%	17%	19%
The last two weeks of November (November 15 - 30)	-	23%	29%	31%	24%	29%	28%
The first two weeks of December (December 1 - 14)	18%	15%	17%	19%	21%	21%	25%
The last two weeks of December (December 15 - 31)	9%	8%	9%	4%	4%	5%	4%

#### 3. Do you plan to do any holiday shopping on "Black Friday"?

	2008	2009	2010	2011	2012	2013	2014
<i>Base (N =)</i>	n/a	n/a	647	567	584	1,139	1,113
Yes	-	-	47%	51%	46%	47%	46%
No	-	-	53%	49%	54%	53%	54%

#### 4. Do you plan to do any holiday shopping on "Cyber Monday"?

	2008	2009	2010	2011	2012	2013	2014
<i>Base (N =)</i>	n/a	n/a	633	567	584	1,139	1,113
Yes	-	-	49%	56%	58%	60%	63%
No	-	-	51%	44%	42%	40%	37%

#### 5. Based on your present situation and feelings toward the economy, which of the following best describes your spending plans for the 2014 holiday season?

	2008	2009	2010	2011	2012	2013	2014
<i>Base (N =)</i>	543	606	653	567	584	1,139	1,113
I plan on spending more for gifts this year than last year	4%	5%	11%	10%	14%	10%	14%
I plan on spending the same for gifts as last year	35%	37%	54%	61%	62%	62%	61%
I plan on spending less for gifts this year than last year	62%	58%	35%	29%	23%	29%	25%

#### 6. Which statement best describes if you plan to purchase gifts online or in-stores during the 2014 holiday season?

	2008	2009	2010	2011	2012	2013	2014
<i>Base (N =)</i>	n/a	n/a	n/a	n/a	n/a	n/a	1,113
Plan to purchase gifts online only	-	-	-	-	-	-	3%
Plan to purchase more gifts online than in-store	-	-	-	-	-	-	30%
Plan to purchase an equal amount of gifts online and in-store	-	-	-	-	-	-	35%
Plan to purchase more gifts in-store than online	-	-	-	-	-	-	26%
Plan to purchase gifts in-store only	-	-	-	-	-	-	6%



# Consumer Pulse

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#### 7. Do you plan to put gift on layaway when shopping during the 2014 holiday season?

	2008	2009	2010	2011	2012	2013	2014
Base (N =)	n/a	n/a	n/a	n/a	n/a	1,139	1,113
Yes	-	-	-	-	-	6%	5%
No	-	-	-	-	-	85%	82%
Unsure	-	-	-	-	-	9%	13%

#### 8. Please indicate in which of the categories below you will be shopping for gifts during the 2014 holiday season. (Select all that apply)

	2008	2009	2010	2011	2012	2013	2014
Base (N =)	n/a	600	644	562	578	1,139	1,113
Apparel and Accessories	-	54%	67%	61%	63%	71%	71%
Gift Cards / Gift Certificates	-	58%	74%	67%	54%	67%	65%
Books	-	40%	52%	44%	43%	42%	39%
Toys	-	46%	55%	50%	40%	45%	38%
Jewelry	-	21%	38%	37%	27%	36%	36%
DVDs / Blu-rays / Videos	-	37%	54%	40%	36%	31%	30%
Consumer Electronics	-	24%	39%	36%	34%	29%	29%
Video Games	-	34%	42%	34%	25%	26%	25%
Sporting Goods	-	13%	28%	24%	19%	21%	22%
Pets / Pet supplies / Accessories	-	12%	26%	20%	14%	19%	22%
Tools / Home Improvement	-	-	27%	21%	15%	18%	20%
Music	-	23%	39%	28%	22%	17%	18%
Computer Hardware / Software	-	16%	24%	21%	18%	20%	18%
Home Décor / Furniture	-	-	20%	14%	13%	15%	15%
Event Tickets	-	4%	14%	11%	9%	12%	12%
Appliances	-	-	8%	6%	8%	10%	11%
Travel	-	-	10%	7%	6%	13%	9%
Flowers	-	14%	14%	8%	8%	3%	5%
Vehicles	-	-	2%	1%	2%	1%	1%
Other	-	-	5%	1%	4%	5%	6%

#### 9. Which statement best describes when you typically purchase gift cards during holiday shopping?

[Asked of respondents who buy gift cards / gift certificates]

	2008	2009	2010	2011	2012	2013	2014
Base (N =)	n/a	n/a	n/a	n/a	n/a	761	737
Buy in advance	-	-	-	-	-	73%	70%
Last minute purchases	-	-	-	-	-	27%	30%

#### 10. Where do you typically purchase gift cards during holiday shopping? (Select all that apply)

[Asked of respondents who buy gift cards / gift certificates]

	2008	2009	2010	2011	2012	2013	2014
Base (N =)	n/a	n/a	n/a	n/a	n/a	762	736
In store location	-	-	-	-	-	74%	64%
At grocery stores	-	-	-	-	-	-	42%
At store website	-	-	-	-	-	29%	28%
At discount stores	-	-	-	-	-	22%	16%
At discount store websites	-	-	-	-	-	8%	4%
At a gift card kiosk (not including the above locations)	-	-	-	-	-	32%	17%
Other	-	-	-	-	-	7%	4%



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#### 11. How do you plan to change your gift shopping habits during the 2014 holiday season, if at all?

	2008	2009	2010	2011	2012	2013	2014
	<i>n/a</i>	462	516	564	581	1,137	1,113
	<i>Base (N =)</i>						
Buy more gifts on sale	-	-	61%	48%	43%	44%	40%
Order more online to take advantage of free shipping offers	-	34%	44%	36%	31%	38%	35%
Order more online to take advantage of promotions, rewards programs and special offers	-	-	-	-	30%	36%	32%
Do more research before purchasing to be sure I get the best price	-	49%	54%	35%	36%	34%	30%
Look for less expensive gifts	-	66%	44%	33%	31%	29%	27%
Use more coupons	-	36%	36%	30%	27%	27%	24%
Shop more at discount stores	-	53%	38%	29%	24%	20%	18%
Plan to buy the same amount for the children, but not for the adults on my list	-	25%	24%	13%	11%	15%	10%
Use a membership card to receive discounts more often	-	6%	19%	13%	14%	13%	12%
Have a gift exchange with my family / friends instead of purchasing a gift for each person individually	-	14%	10%	7%	8%	8%	7%
Put more gifts on layaway	-	-	-	5%	6%	4%	3%
Other	-	3%	1%	2%	1%	2%	2%
None, do not plan to change my gift shopping habits	-	-	-	21%	25%	23%	24%

#### 12. About how much in total do you expect to spend on gift shopping during the 2014 holiday season?

	2008	2009	2010	2011	2012	2013	2014
	<i>n/a</i>	606	653	565	561	1,127	1,104
	<i>Base (N =)</i>						
\$100 or less	-	17%	4%	5%	5%	5%	5%
\$101 - \$250	-	18%	15%	16%	18%	14%	16%
\$251 - \$500	-	32%	27%	33%	26%	28%	28%
\$501 - \$750	-	13%	17%	19%	17%	19%	17%
\$751 - \$1,000	-	9%	14%	15%	14%	15%	14%
\$1,001 - \$1,500	-	6%	11%	6%	9%	10%	9%
\$1,501 - \$2,000	-	2%	6%	3%	6%	4%	5%
\$2,001 - \$3,000	-	2%	4%	2%	2%	3%	2%
\$3,001 - \$4,000	-	1%	<1%	0%	1%	1%	1%
\$4,001 - \$5,000	-	0%	1%	<1%	0%	1%	0%
More than \$5,000	-	1%	1%	<1%	1%	0%	1%

#### 13. Please indicate the approximate percentage of your total holiday shopping you expect to spend using the following payment methods during the 2014 holiday season.

	2008	2009	2010	2011	2012	2013	2014
	<i>Mean %</i>						
	<i>Base (N =)</i>	541	602	653	567	584	1,137
I will use a credit card	59%	24%	45%	43%	43%	49%	48%
I will use a debit card / check	33%	54%	34%	33%	34%	30%	31%
I will use cash	8%	23%	19%	21%	20%	17%	18%
I will use a gift card / gift certificate	-	-	2%	3%	4%	4%	4%

#### Statistical Statement:

The AAA Consumer Pulse™ Survey was conducted online among residents living in the Southern Region of The Auto Club Group (Florida, Georgia and Tennessee) from October 20 - November 3, 2014. A total of 1,210 residents completed the survey, with 1,113 planning to purchase gifts during the 2014 holiday season. Overall survey responses are weighted by gender and age within state to ensure reliable and accurate representation of the adult population (18+) in Florida, Georgia and Tennessee.

Survey	Base (N=)	Maximum Margin of Error
2008	543	± 4.2 percentage points
2009	606	± 4.0 percentage points
2010	653	± 3.8 percentage points
2011	567	± 4.1 percentage points
2012	584	± 4.1 percentage points
2013	1,139	± 2.9 percentage points
2014	1,113	± 2.9 percentage points