

# 2013 Technology Holiday Shopping QuickPulse Survey

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# Methodology

TECHnalysis Research surveyed 401 US adults, ages 18-74, about their technology-related product purchases on Thanksgiving day, Black Friday and Cyber Monday, both in retail and online. Via an online QuickPulse survey, respondents were asked which devices and which brands they bought, for whom the purchase was intended, what the purpose of the purchase was, how much they spent and, if online, on which devices the purchases were made.



# Highlights



- Large screen (>8") tablets were the top sellers both in retail and online
  - Smartphone accessories were tops in Black Friday online purchases
- Top gift purchases were small screen tablets
  - Top non-gift purchases were PC accessories
- Only 44% of electronics purchases were gifts for others
- 57% of purchases were new additions, 43% were replacements for existing devices
- Dollars spent on Thanksgiving retail purchases was 1.4x higher than Black Friday retail and 1.7x higher than Cyber Monday online
- 45% of Black Friday and 39% of Cyber Monday online purchases were made on mobile devices

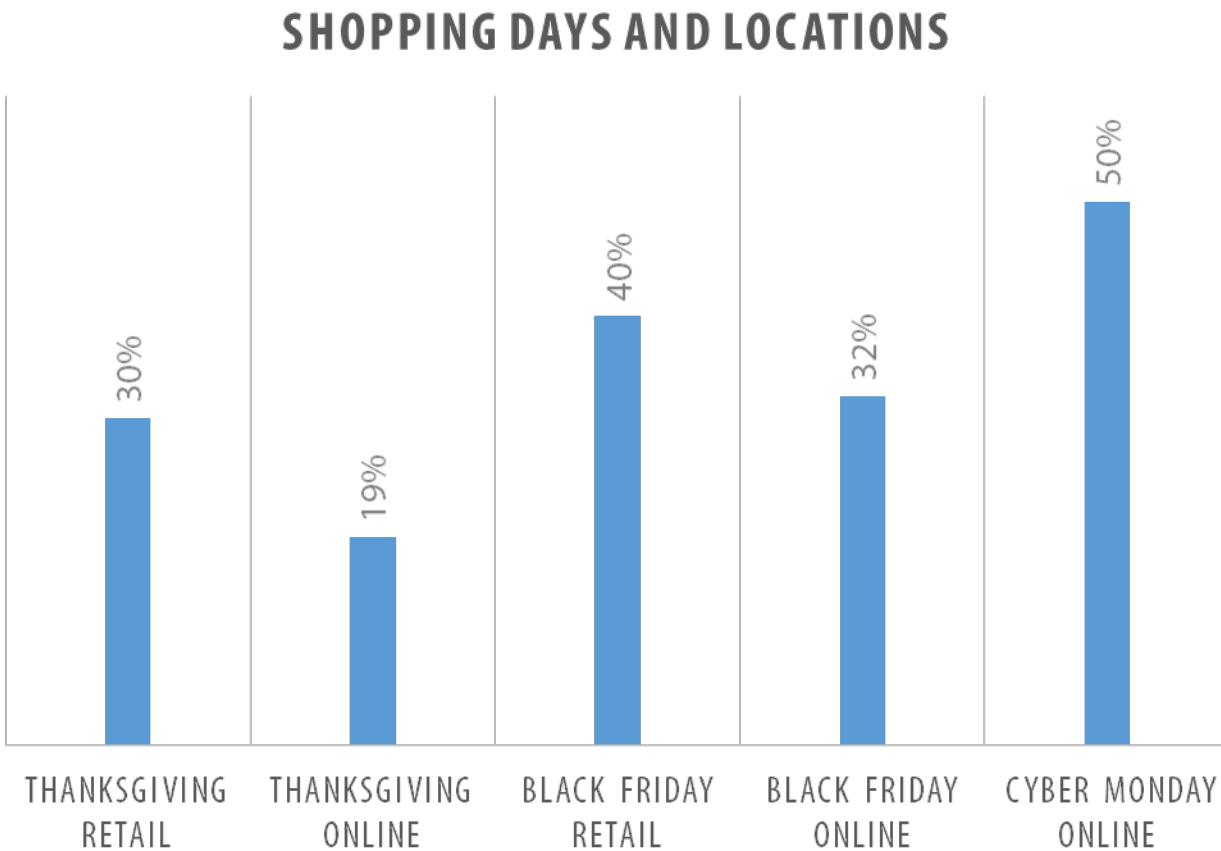


# Top 10 Devices Bought

1	Apple iPad (9.7")
2	Microsoft Xbox Consoles
3	Apple iPhone
4	Apple iPad Mini
5	Nintendo Wii Consoles
6	Samsung Galaxy Tablets
7	Sony PlayStation Consoles
8	Samsung Smart TV
9	Samsung Galaxy Smartphone
10 (tie)	Dell Touch Notebook
10 (tie)	Amazon Kindle Fire
10 (tie)	Samsung 40"+TV

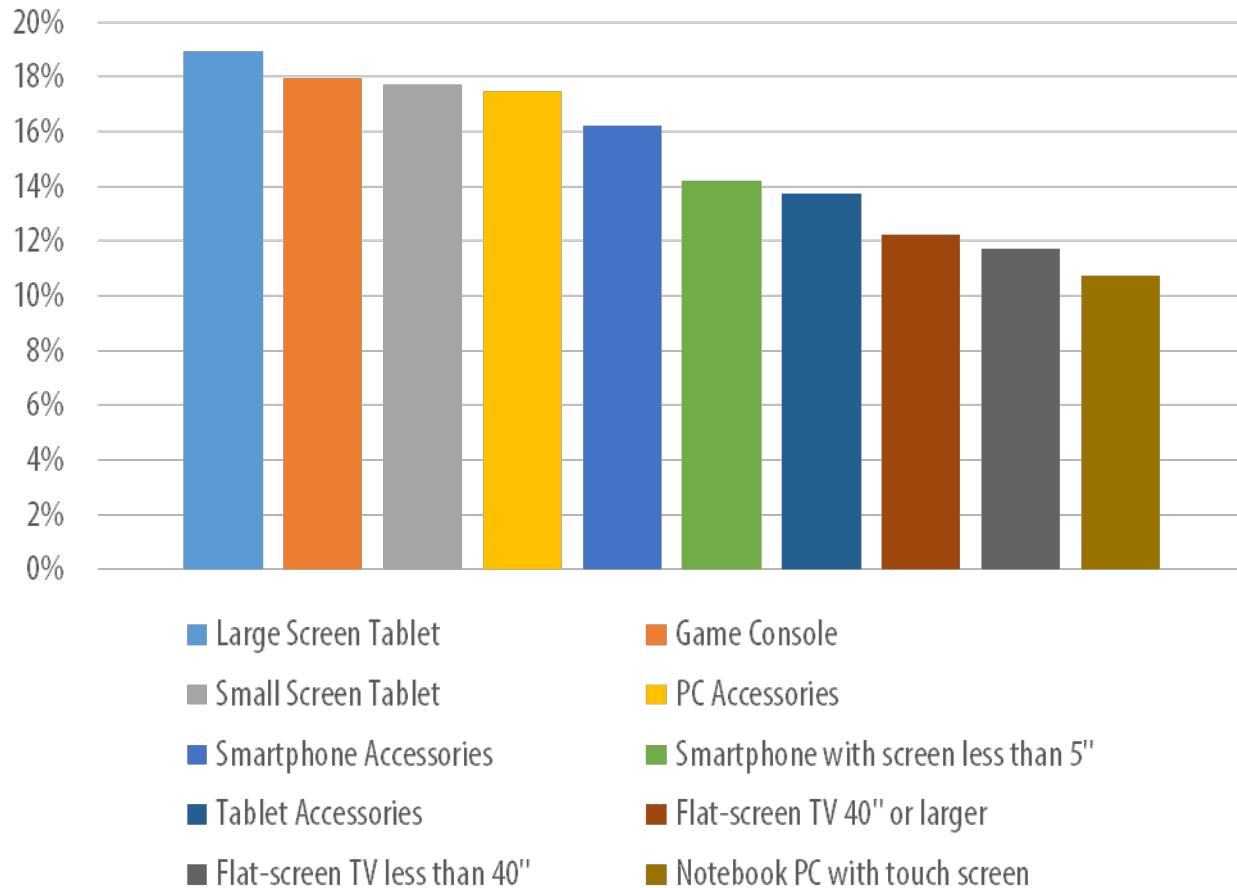


# Days Shopped



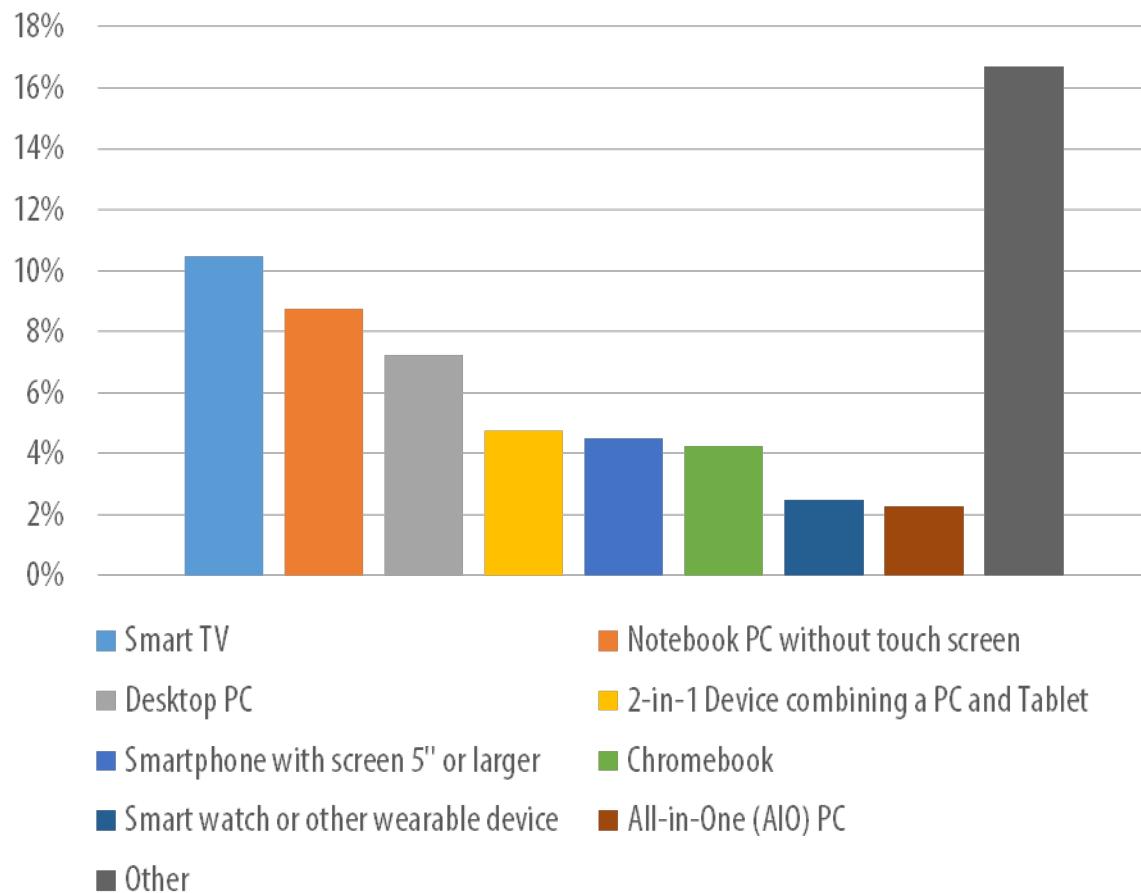
- A minimum of 200 respondents shopped on Black Friday (retail or online) and 200 shopped on Cyber Monday
- 54% of respondents shopped on multiple days

# Top 10 Categories Purchased



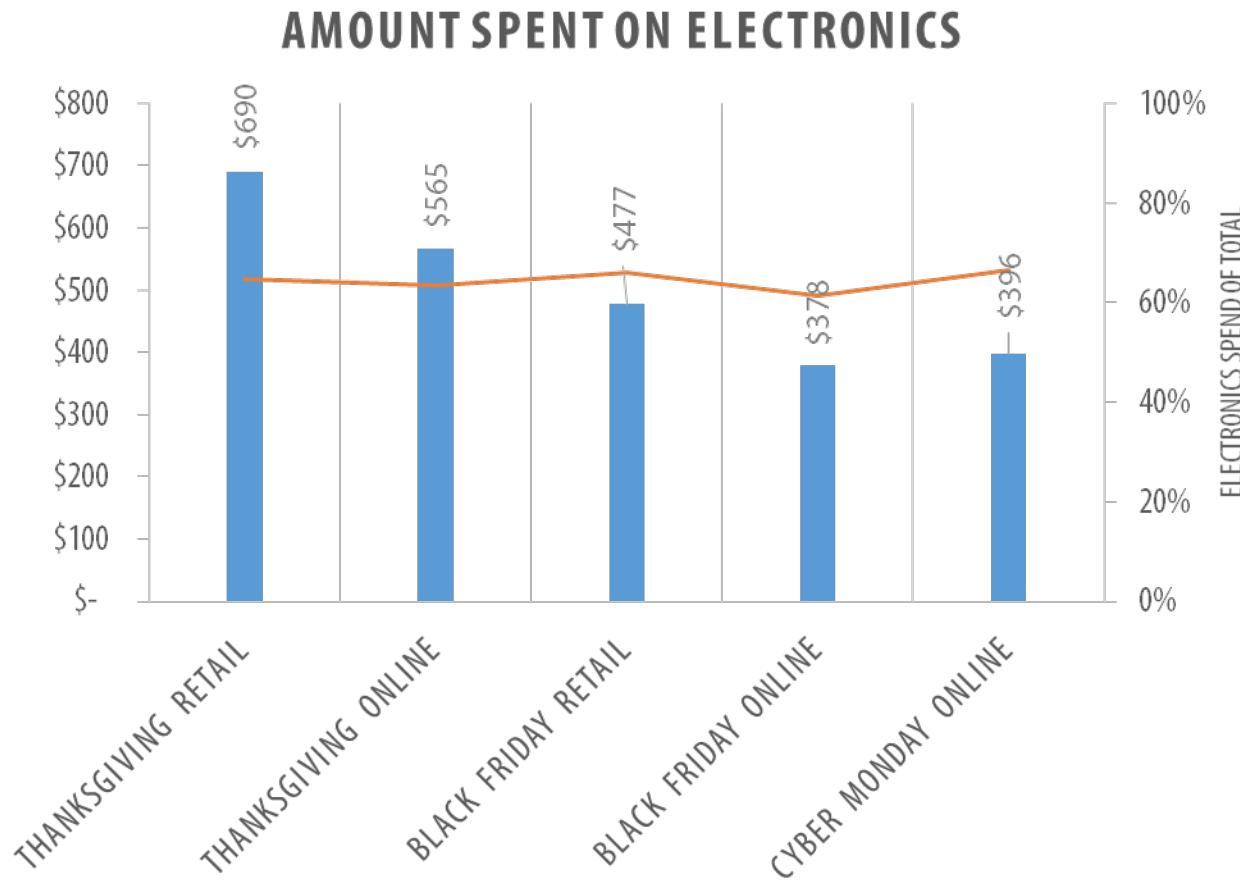
- Tablets, game consoles, PC accessories and smartphone accessories were top 5 categories overall
- Each top 10 category was purchased by more than 10% of respondents

# Next 9 Categories Purchased



- “Other” category, including cameras, iPods, AV equipment, video games, etc., was also strong
- 5 of bottom nine categories were PC-related

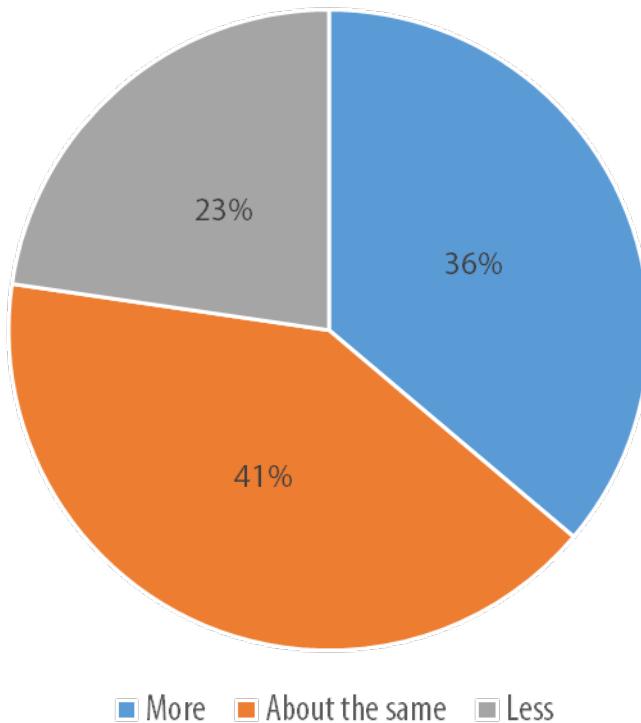
# Dollars Spent by Day



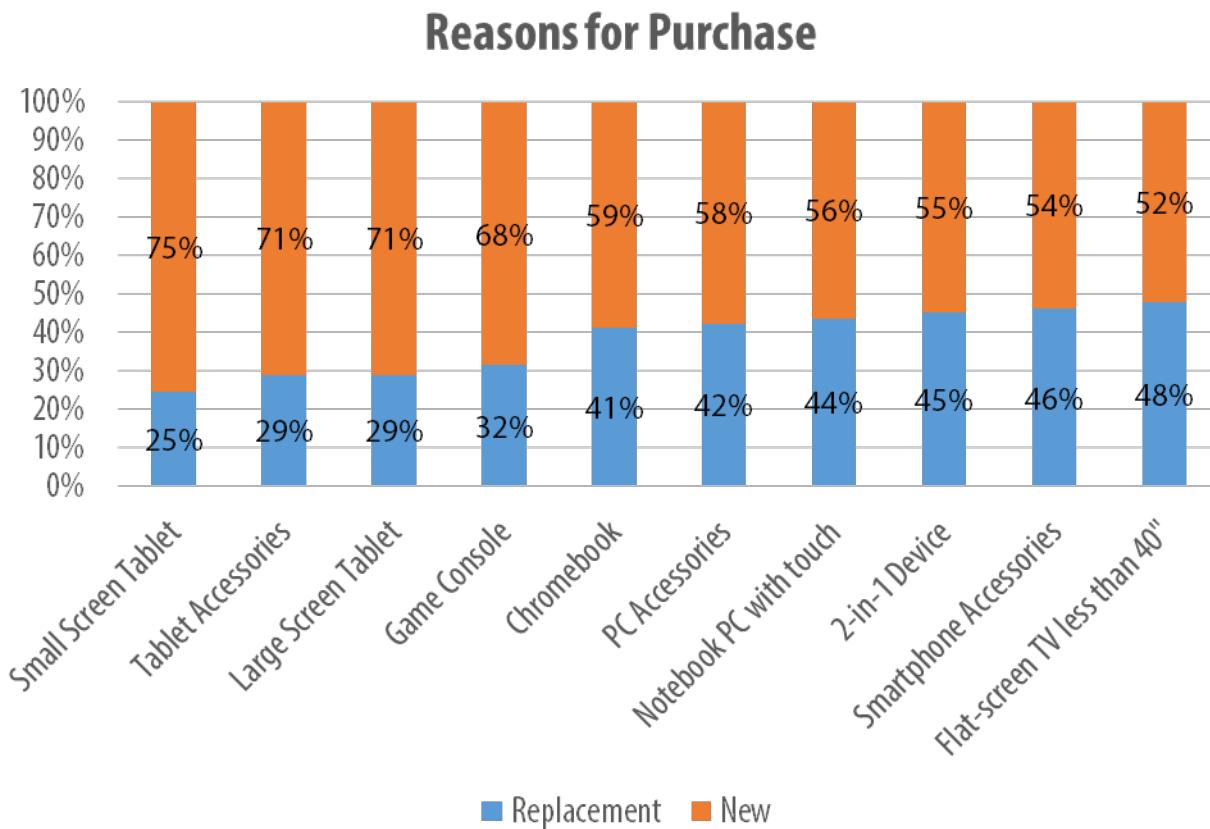
- Overall averages were \$502 across all days, \$584 in retail and \$447 online
- On each day and in each channel, approximately 2/3 of all respondents' purchase dollars were for electronics

# Slight Increase in Spending vs. Last Year

**Spending Dollars vs. Last Year**

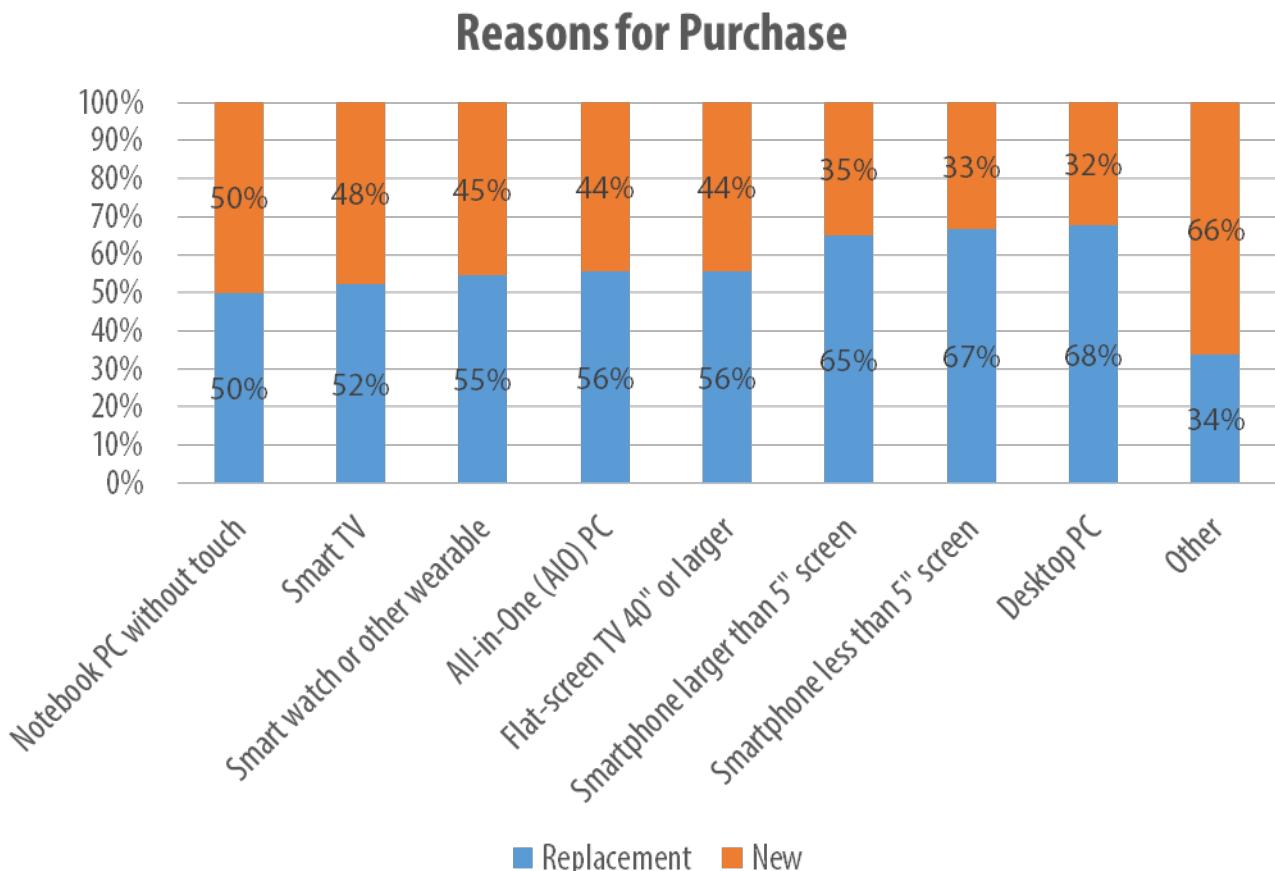


# Newer Categories Primarily Drove First Time Purchases



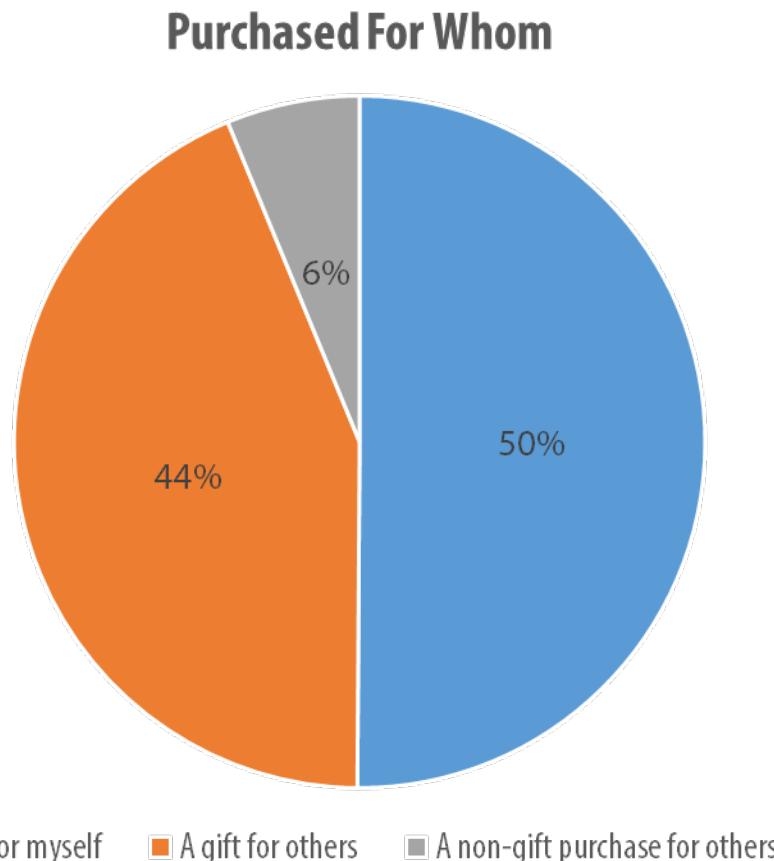
- Most tablet purchases were new, but 25% of small size and nearly 30% of large size tablets were replacements of existing devices
- Touch-based notebooks and 2-in-1s primarily seen as new, but large percentages view them as replacement devices

# Replacements Stronger in Established Categories

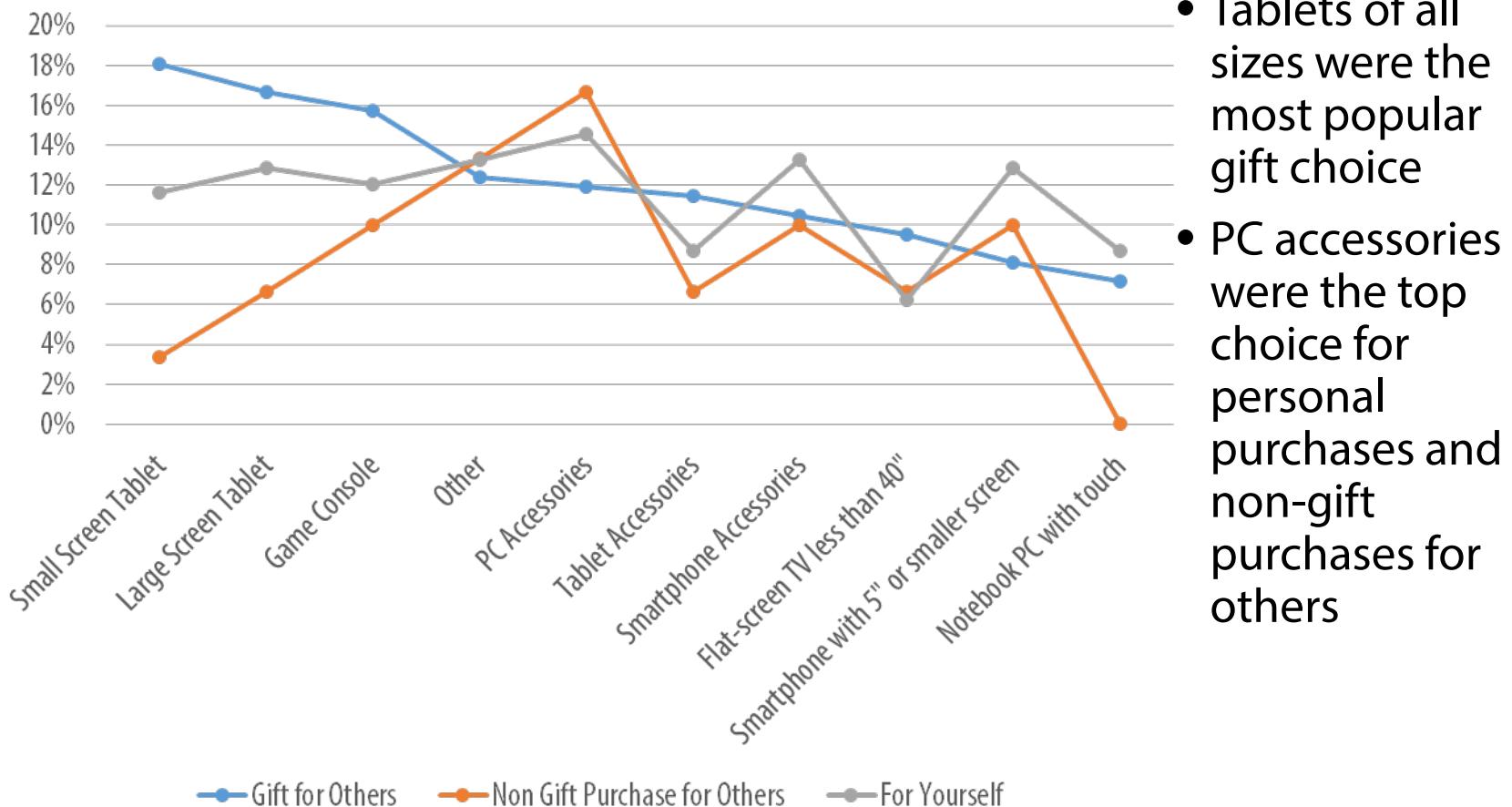


- Most smartphone, PC and TV purchases were replacements for existing devices
- The high percentage of replacements for wearables suggests dissatisfaction with first purchases

# Half of Purchases for Individuals, Half for Others

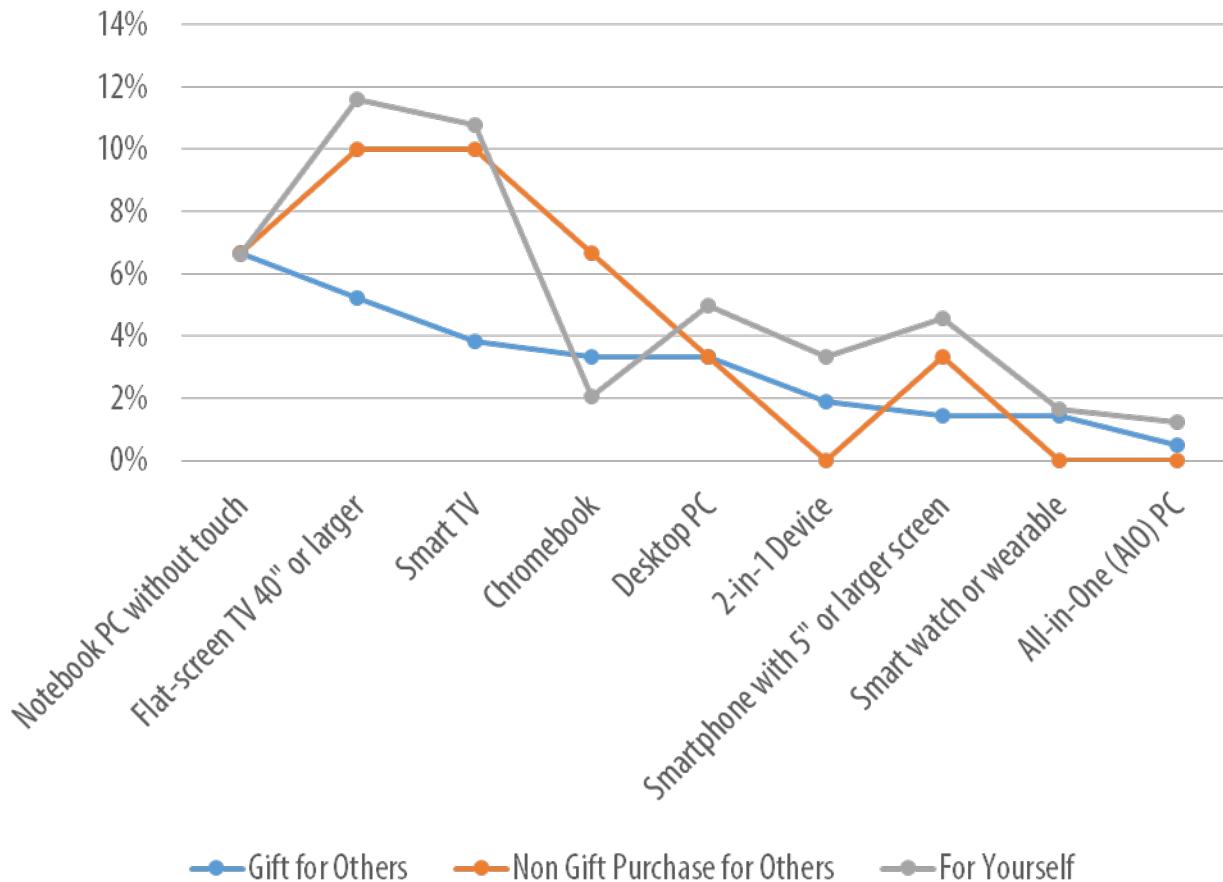


# Device Purchase Varied by Intended Recipient



- Tablets of all sizes were the most popular gift choice
- PC accessories were the top choice for personal purchases and non-gift purchases for others

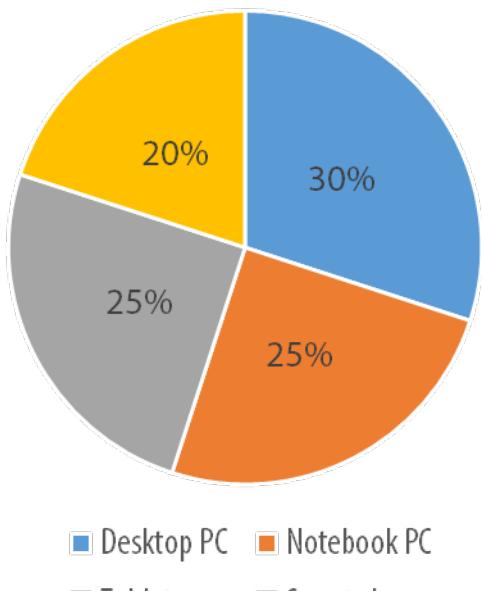
# Traditional Categories Less Likely to be Gifts



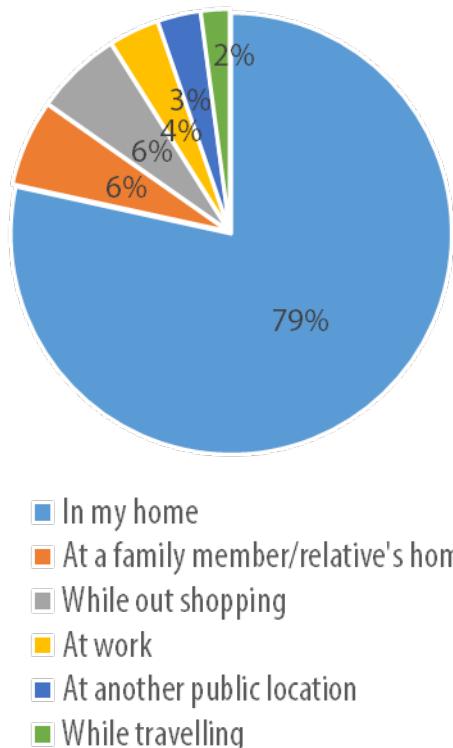
- Large flat-screen TVs and Smart TVs were popular for individuals and non-gift purchases
- Non-touch notebook purchases were equally spread among all groups, but no other PC-related category was rated highest as a Gift purchase

# Black Friday Online Purchases

**Black Friday Online Purchase Device**



**Black Friday Online Shopping Location**

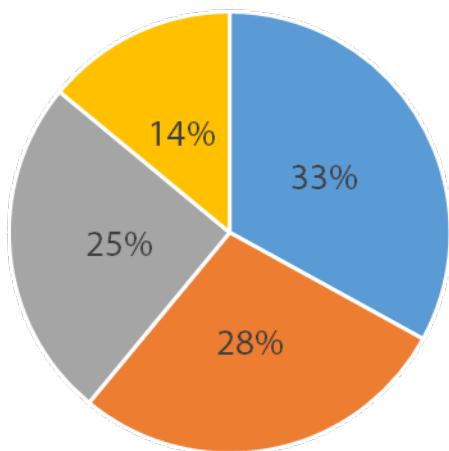


- The total quantity of purchases made on tablets equaled that made on notebooks
- 11% of online purchases were made while people were mobile

N=160

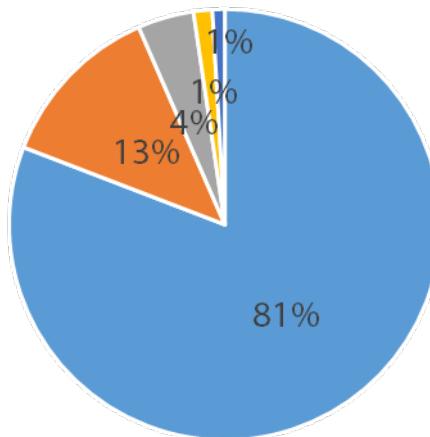
# Cyber Monday Online Purchases

**Cyber Monday Online Purchase Device**



■ Desktop PC   ■ Notebook PC  
■ Tablet   ■ Smartphone

**Cyber Monday Online Shopping Location**

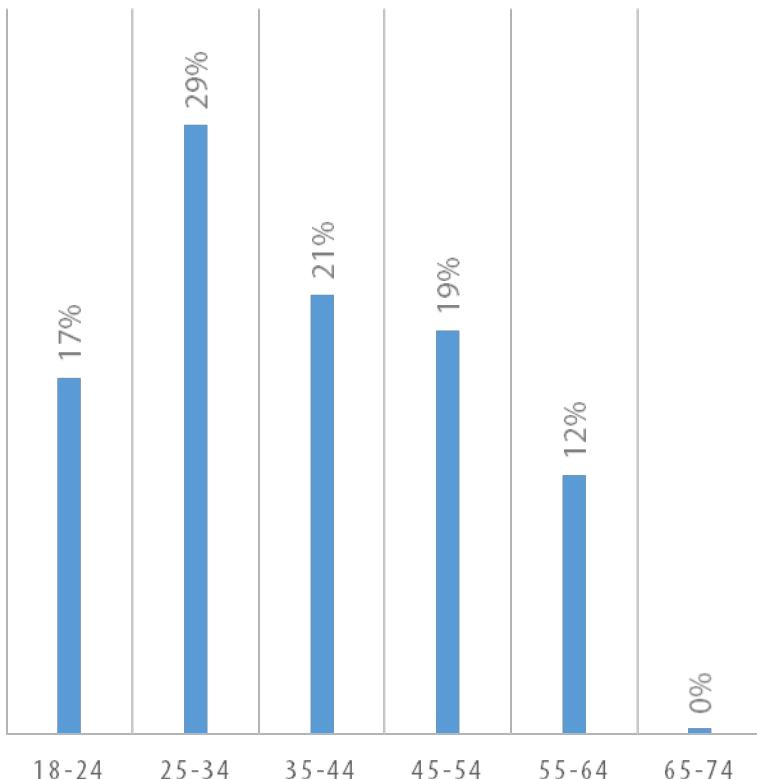


■ In my home  
■ At work  
■ Family member/relative's home  
■ While out shopping  
■ At another public location

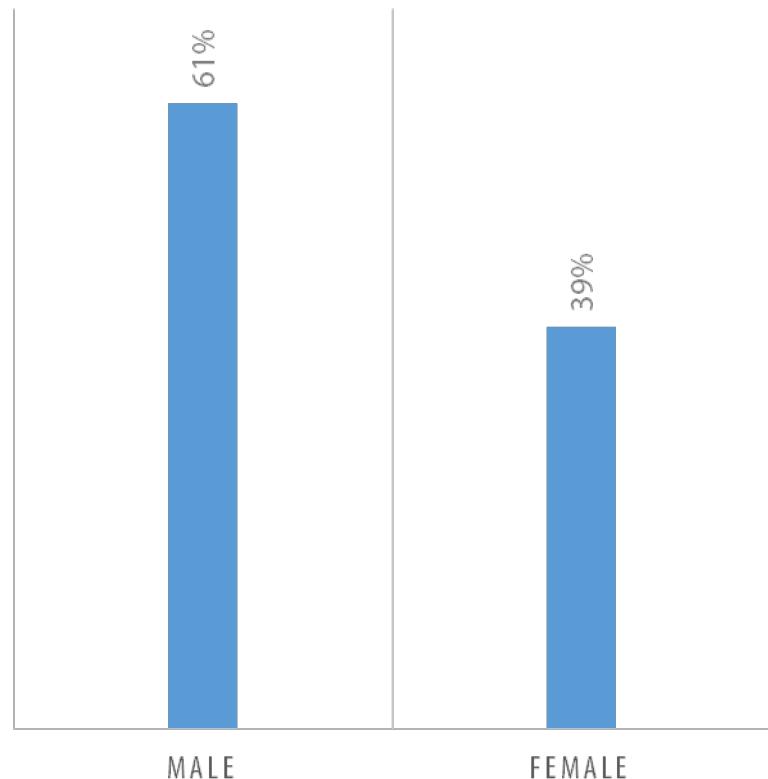
- More Cyber Monday purchases were made on PCs and while at work

# Demographics

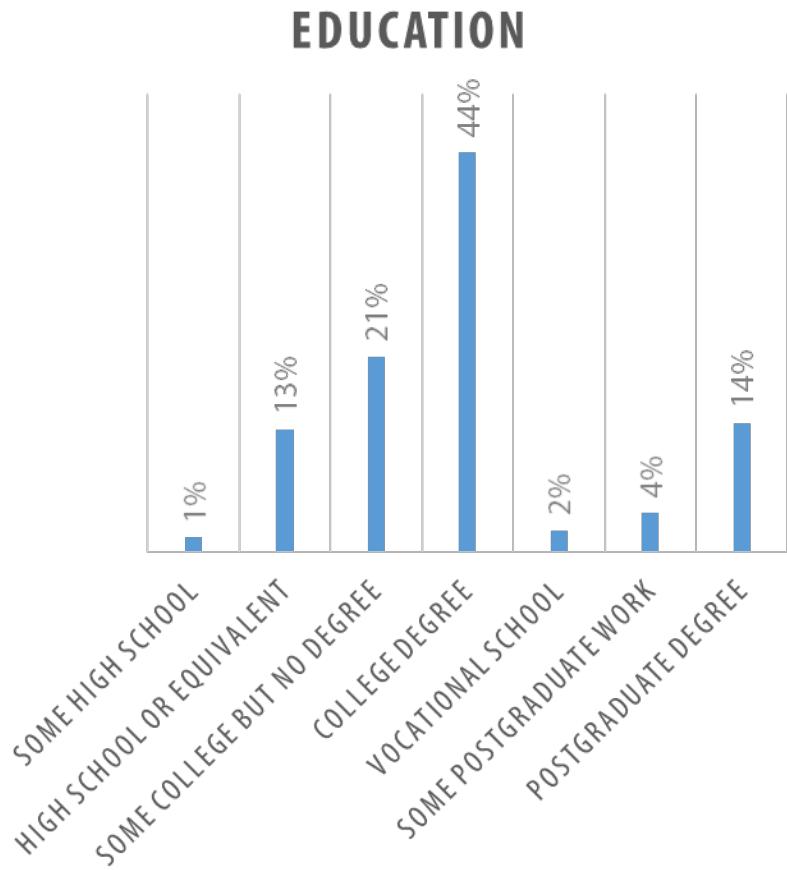
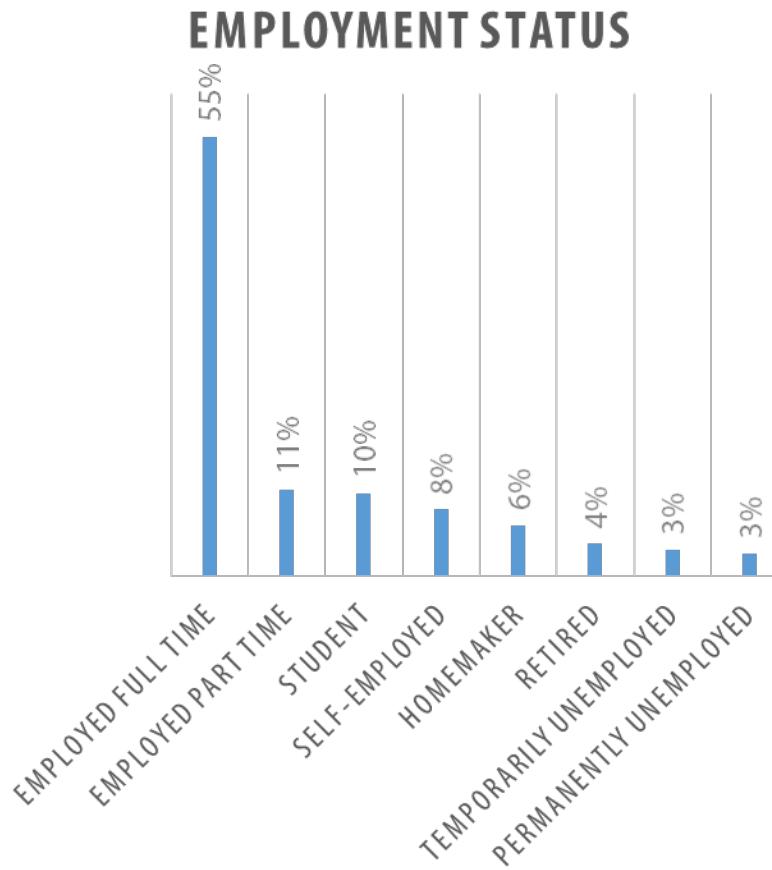
AGE



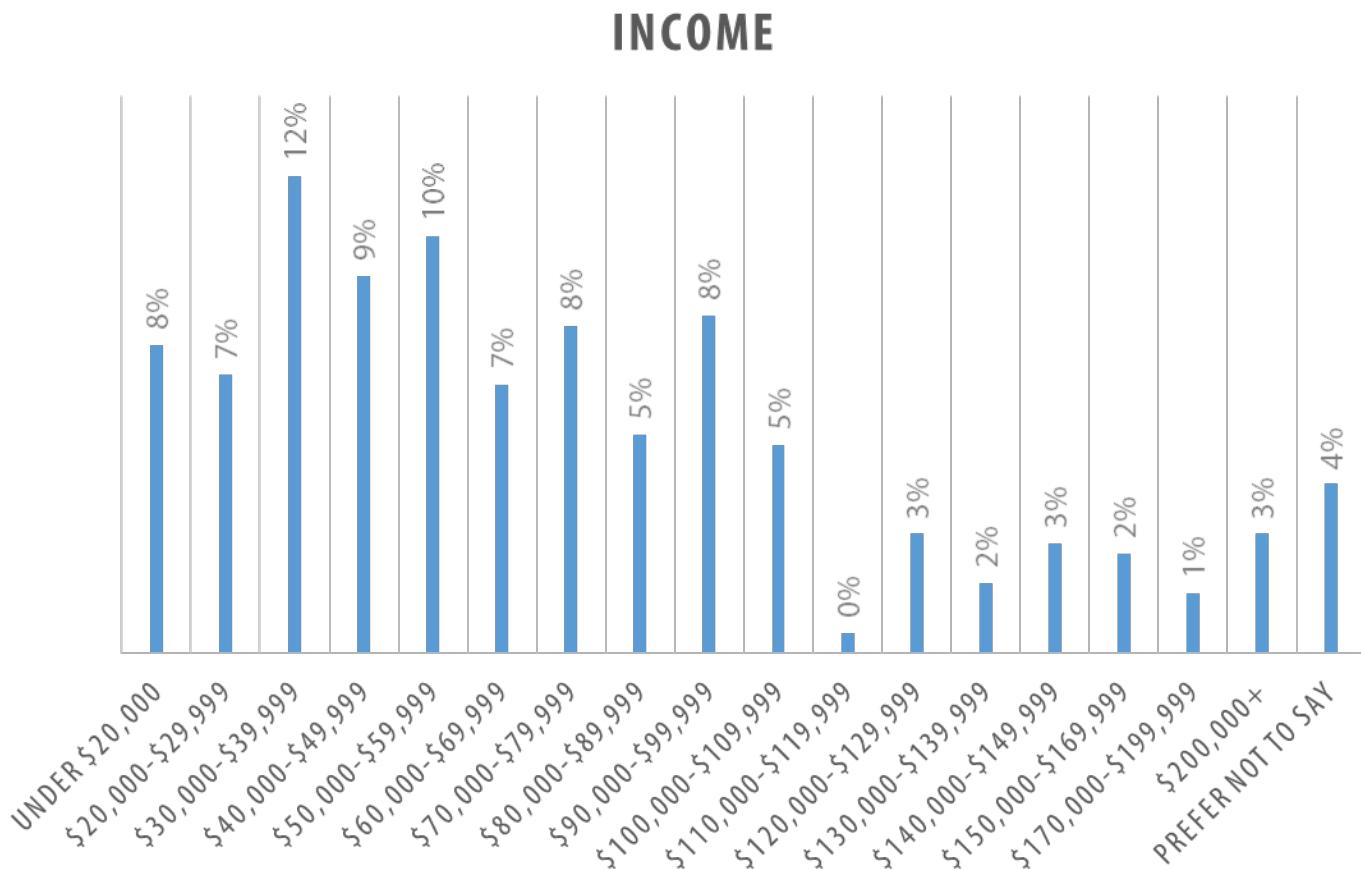
GENDER



# Demographics, Part 2



# Income Levels



- The average income of respondents was just under \$70,000

# Conclusions

- Holiday shopping buyers clearly responded to the advertised deals and adjusted their shopping patterns accordingly
  - Strong purchases of big-ticket items like large TVs, game consoles and other more expensive categories were made on Thanksgiving Day
  - Big pickup for lower-priced items like accessories that were highly promoted
- Top 5 items each day were different suggesting vendors can clearly strategize different offers to target different audiences on different days and through different channels
- Apple and Samsung continue to dominate from a brand perspective, but game consoles from the big three players (Microsoft, Sony and Nintendo) were surprisingly strong
- Even in newer categories, the percentage of replacement sales was quite high, showing relatively rapid turnover

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