

Thanksgiving, the Economy, & Consumer Behavior November 15-18, 2013

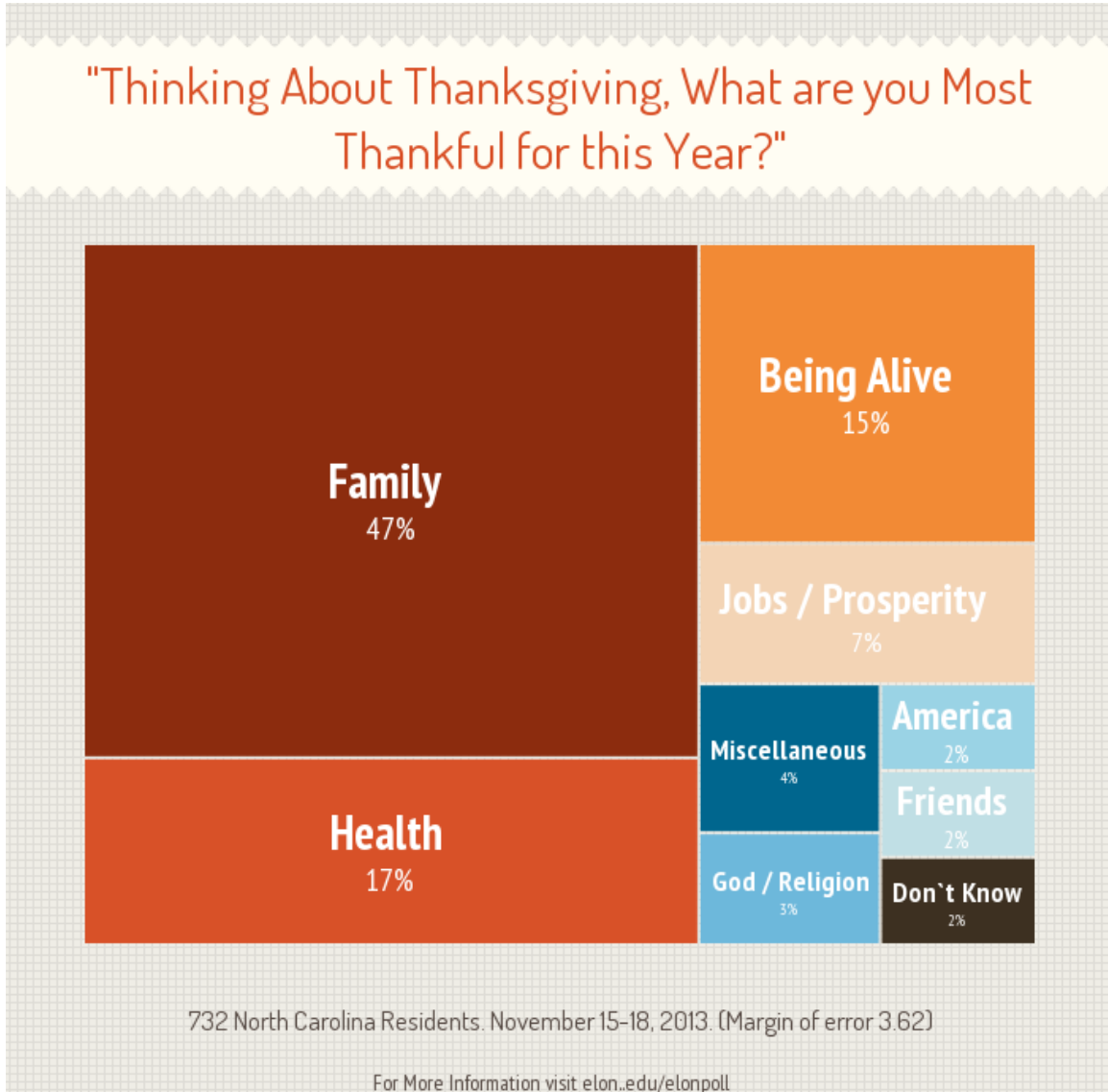
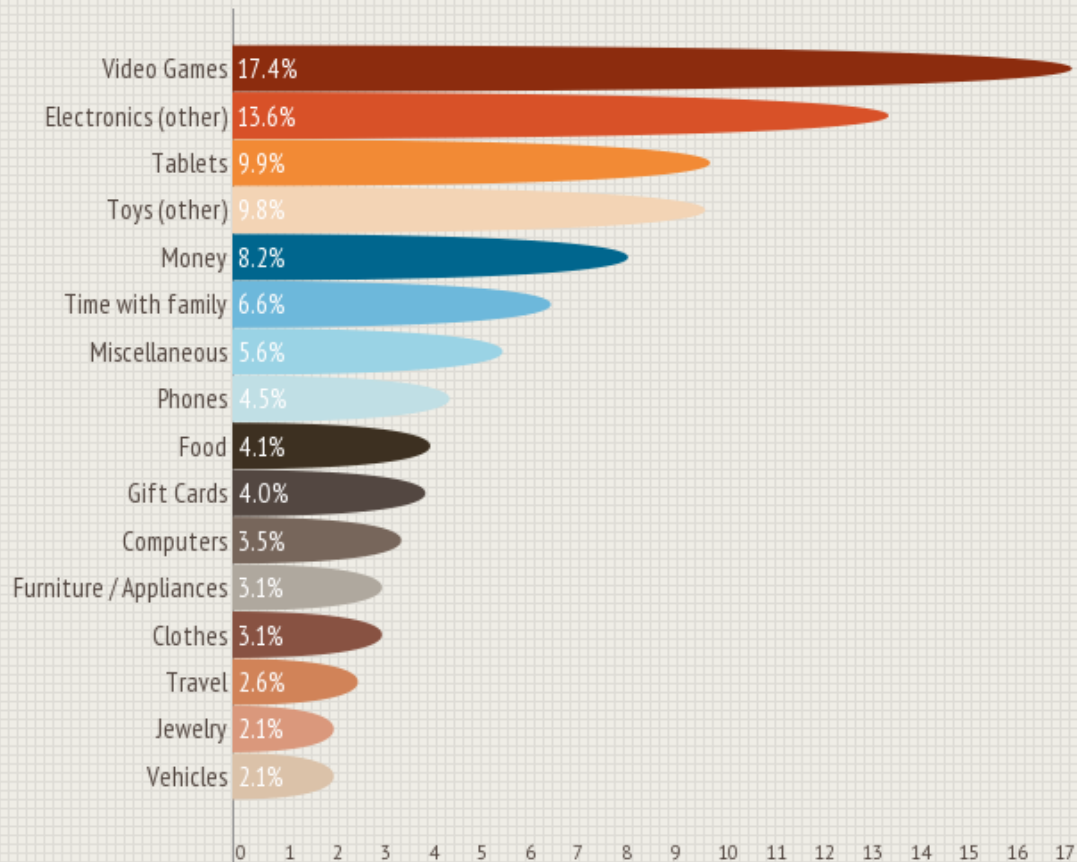


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What is the one gift item that your friends and family seem most excited about this holiday season?



732 North Carolina Residents. November 15-18, 2013. (Margin of error 3.62)

Don't Knows and Refused omitted

For more information visit elon.edu/elonpoll

EXECUTIVE SUMMARY

Holiday Shopping and the Economy

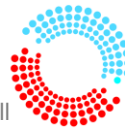
According to the National Retail Federation, holiday sales represented almost 20% of total retail industry sales in 2012. Holiday sales are carefully followed by industry experts and investors, as they are often seen as an important indicator of the health of the economy. Because Thanksgiving is arriving late this year, the holiday shopping season will be shorter than usual. The shorten holiday season, along with a state unemployment rate higher than the national average, has some analysts predicting sales to fall short of expectations. The Elon University Poll conducted a live-caller, dual frame (landline and cell phone) survey of 732 residents of North Carolina between November 15-18, 2013. The survey has a margin of error of 3.62 percent and asked a battery of questions related to the economy, holiday shopping, and consumer behavior.

Consumer Confidence and Behavior

One factor in consumer behavior and spending is the level of confidence a consumer has in the future of the economy. Individuals who believe the economy will get worse are less likely to make large purchases, whereas shoppers who are optimistic about the economy are more likely to spend more on consumer goods. Approximately 33% of North Carolina Residents believe the economy will improve over the next year. This is a slight increase since September (27%), but over 39% of respondents believe the economy will get worse, a 10 point increase since September.

Plans for Holiday Shopping

When asked if they plan to do any holiday shopping this season, 83% of respondents said yes. There was practically no difference in response between men (82%) and women (84%). Not surprisingly, higher income respondents (incomes over \$50,000) were more likely to say they were planning to go holiday shopping (88%), but respondents over the age of 65 were less likely (65%). When respondents were asked whether they believed they would spend more, less or about the same money on gifts this holiday season 20% said more, 34% said less, and 46% said about the same.



Black Friday and Cyber Monday

Of the 83% of respondents who said they were planning on doing some shopping during the holidays, most (71%) said they were not planning on shopping on Black Friday, the day after Thanksgiving. Instead, more respondents (32.6%) plan on shopping online on the Monday after Thanksgiving, known as Cyber Monday, compared to 26% on Black Friday. Just over 11 percent of respondents said they plan to shop on both Black Friday and Cyber Monday. When asked what percentage of your holiday shopping will be done online, using the internet, the average response was approximately 30%, but responses ranged from 0% to 100%.

This Season's Hot Ticket Items

In some cases “hot ticket items” can help offset some factors that depress retail sales, helping not only the specific industry that manufactured that item, but bringing in more customers into the stores overall. Respondents were asked, “What is the one gift item that your friends and family seem most excited about this holiday season?” Electronic devices clearly dominate North Carolinian’s shopping lists. The most frequent response was some type of video game or video game console (17.4%). Within that category, PlayStation/PS4 was mentioned the most, followed closely by Xbox/Xbox One. The second most common type of gift mentioned were electronics (13.6%), not including video games or tablets. Within the electronics category, Apple products were most frequently mentioned.

Giving Thanks

Of course, shopping is not the only (or the main) reason for the season. During this holiday season many North Carolinians are thankful for many aspects of their life. The Elon Poll survey in November ended with this simple question: “Thinking about Thanksgiving, what are you thankful for this year?” Not surprisingly, the most common answer was family (47%), followed by health (17%).

TOPLINE

Prospective Economic Evaluation

Do you expect the economy to get better, get worse, or stay about the same over the next year?

Better.....	238	32.50%
Worse.....	289	39.40%
About the same	193	26.40%
Don't know.....	12	1.70%
N=	732	100.00%

Shopping

Do you plan on doing any holiday shopping this season?

Yes.....	607	83.00%
No.....	116	15.80%
Don't Know	9	1.20%
N=	732	100.00%

Holiday Spending

Compared to last year, do you think you will spend [more, less] or about the same amount of money on gifts this holiday season?

More	121	20.00%
Less.....	205	33.80%
About the same	279	45.90%
Don't Know	2	0.30%
N=	607	100.00%

Black Friday

Will you go shopping on the day after Thanksgiving known as Black Friday?

Yes.....	157	25.90%
No.....	429	70.70%
Don't Know	21	3.40%
N=	607	100.00%

Cyber Monday

Will you shop online on the Monday after Thanksgiving known as Cyber Monday?

Yes	198	32.60%
No.....	362	59.60%
Don't Know	47	7.80%
N=	607	100.00%

Online Shopping

Approximately what percentage of your holiday shopping will be done online?

0%.....	199	32.80%
1% to 10%.....	61	10.00%
11% to 30%.....	99	16.30%
31% to 50%.....	138	22.70%
51% to 89%.....	73	12.10%
90% to 100%.....	35	4.80%
Don't Know	2	0.30%
N=	607	100.00%

Most Exciting Gift

What is the one gift item that your friends and family seem most excited about this holiday season? [Don't know and refuse are not included]

Video Games	58.....	17.3%
Electronics (other)	46.....	13.7%
Tablets	33.....	9.8%
Toys (other).....	33.....	9.8%
Money	27.....	8.0%
Time with family	22.....	6.6%
Miscellaneous	19.....	5.7%
Phones.....	15.....	4.5%
Food.....	14.....	4.2%
Gift Cards.....	13.....	3.9%
Computers.....	12.....	3.6%
Furniture / Appliances	10.....	3.0%
Clothes	10.....	3.0%
Travel	9.....	2.7%
Jewelry	7.....	2.1%
Vehicles.....	7.....	2.1%
Total	335	100%

Thankful

Thinking about Thanksgiving, what are you thankful for this year?

Family.....	343.....	46.9%	
Health.....	126.....	17.2%	
Being Alive	108.....	14.8%	
Job / Economic.....	53.....	7.2%	
Miscellaneous	32.....	4.4%	
God / Religion	23.....	3.1%	
America	15.....	2.0%	
Friends	15.....	2.0%	
Don't Know	13.....	1.8%	
Refused.....	4.....	0.6%	
Total	732	100%	

DEMOGRAPHICS

Income

Is your annual household income more or less than \$50,000?

(If = Under \$50,000) Is it more or less than \$25,000?

(If = Over \$50,000) Is it more or less than \$75,000?

Less than \$25,000	132	18.10%
\$25,000 to \$50,000	175	23.90%
\$50,000 to \$75,000	124	16.90%
More than \$75,000	210	28.70%
Don't Know	49	6.70%
Refused	42	5.70%
N=	732	100.00%

Age

How old are you?

18-30	167	22.80%
31-40	132	18.00%
41-50	104	14.40%
51-65	210	28.70%
65+	118	16.10%
N=	732	100.00%

Race

For statistical purposes only, could you please tell me your race or ethnic background?

White	527	72.10%
Black	153	20.90%
Other	52	7.10%
N=	732	100.00%

Gender

Was the person male or female?

Male	351	48.00%
Female	381	52.00%
N=	732	100.00%

CROSS-TABS

Prospective Economic Evaluation

Do you expect the economy to get better, get worse, or stay about the same over the next year?

Prospective Economic Evaluation and Gender					
	Better	Worse	About the same	Don't know	Total
	%	%	%	%	%
Male	33	38	27	2	100
Female	32	41	26	2	100
Total	32	39	26	2	100

Prospective Economic Evaluation and Age					
	Better	Worse	About the same	Don't know	Total
	%	%	%	%	%
18-30	29	42	29	0	100
31-40	36	43	19	2	100
41-50	35	41	22	2	100
51-65	30	37	30	2	100
65+	34	35	28	3	100
Total	32	39	26	2	100

Prospective Economic Evaluation and Income					
	Better	Worse	About the same	Don't know	Total
	%	%	%	%	%
Less than \$25,000	28	44	27	0	100
\$25,000 to \$50,000	33	38	27	2	100
\$50,000 to \$75,000	31	44	24	1	100
More than \$75,000	39	29	30	2	100
Total	33	38	28	1	100

Shopping

Do you plan on doing any holiday shopping this season?

Holiday Shopping and Gender				
	Yes	No	Don't Know	Total
	%	%	%	%
Male	82	17	1	100
Female	84	15	1	100
Total	83	16	1	100

Holiday Shopping and Age				
	Yes	No	Don't Know	Total
	%	%	%	%
18-30	86	10	4	100
31-40	85	15	0	100
41-50	90	10	0	100
51-65	86	13	1	100
65+	65	35	0	100
Total	83	16	1	100

Holiday Shopping and Income				
	Yes	No	Don't Know	Total
	%	%	%	%
Less than \$25,000	70	29	2	100
\$25,000 to \$50,000	85	15	1	100
\$50,000 to \$75,000	88	12	0	100
More than \$75,000	88	11	1	100
Total	83	16	1	100

Holiday Spending

Compared to last year, do you think you will spend [more, less] or about the same amount of money on gifts this holiday season?

Spending Compared to Last Year and Gender					
	More	Less	About the same	Don't Know	Total
	%	%	%	%	%
Male	21	30	49	1	100
Female	19	37	43	0	100
Total	20	34	46	0	100

Spending Compared to Last Year and Age					
	More	Less	About the same	Don't Know	Total
	%	%	%	%	%
18-30	36	39	25	0	100
31-40	31	27	42	0	100
41-50	10	39	51	0	100
51-65	10	37	53	1	100
65+	9	20	69	2	100
Total	20	34	46	0	100

Spending Compared to Last Year and Income					
	More	Less	About the same	Don't Know	Total
	%	%	%	%	%
Less than \$25,000	33	36	31	0	100
\$25,000 to \$50,000	25	34	41	0	100
\$50,000 to \$75,000	15	39	46	0	100
More than \$75,000	14	26	59	0	100
Total	21	32	47	0	100

Black Friday

Will you go shopping on the day after Thanksgiving known as Black Friday?

Black Friday and Gender				
	Yes	No	Don't Know	Total
	%	%	%	%
Male	21	76	3	100
Female	30	66	4	100
Total	26	71	3	100

Black Friday and Age				
	Yes	No	Don't Know	Total
	%	%	%	%
18-30	45	52	3	100
31-40	22	74	5	100
41-50	24	75	1	100
51-65	19	77	5	100
65+	16	82	3	100
Total	26	71	3	100

Black Friday and Income				
	Yes	No	Don't Know	Total
	%	%	%	%
Less than \$25,000	33	64	3	100
\$25,000 to \$50,000	24	71	5	100
\$50,000 to \$75,000	34	65	1	100
More than \$75,000	16	81	4	100
Total	25	72	3	100

Cyber Monday

Will you shop online on the Monday after Thanksgiving known as Cyber Monday?

Cyber Monday and Gender				
	Yes	No	Don't Know	Total
	%	%	%	%
Male	32	61	7	100
Female	33	59	8	100
Total	33	60	8	100

Cyber Monday and Age				
	Yes	No	Don't Know	Total
	%	%	%	%
18-30	45	48	7	100
31-40	47	49	4	100
41-50	33	57	10	100
51-65	24	66	10	100
65+	8	85	7	100
Total	33	60	8	100

Cyber Monday and Income				
	Yes	No	Don't Know	Total
	%	%	%	%
Less than \$25,000	30	64	6	100
\$25,000 to \$50,000	30	61	8	100
\$50,000 to \$75,000	34	60	6	100
More than \$75,000	41	52	7	100
Total	35	58	7	100

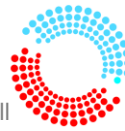
Online Shopping

Approximately what percentage of your holiday shopping will be done online?

Percent Shopping Online and Gender							
	0%	1% to 10%	11% to 30%	31% to 50%	51% to 89%	90% to 100%	Total
	%	%	%	%	%	%	%
Male	28	12	18	25	12	6	100
Female	38	8	15	21	13	6	100
Total	33	10	16	23	12	6	100

Percent Shopping Online and Age							
	0%	1% to 10%	11% to 30%	31% to 50%	51% to 89%	90% to 100%	Total
	%	%	%	%	%	%	%
18-30	29	6	15	29	15	6	100
31-40	22	7	15	28	19	8	100
41-50	24	15	19	24	13	5	100
51-65	39	12	19	15	9	6	100
65+	53	10	10	19	4	3	100
Total	33	10	16	23	12	6	100

Percent Shopping Online and Income							
	0%	1% to 10%	11% to 30%	31% to 50%	51% to 89%	90% to 100%	Total
	%	%	%	%	%	%	%
Less than \$25,000	54	4	11	17	8	6	100
\$25,000 to \$50,000	37	12	15	20	10	6	100
\$50,000 to \$75,000	33	10	16	28	8	6	100
More than \$75,000	17	11	20	29	18	6	100
Total	32	10	16	24	12	6	100



Basic Methodological Information

Mode:	Live Interviewer RDD Telephone Interviews (Dual Frame: Cell Phone and Landlines)
Population & Sample Area	North Carolina; Registered Voters
Dates in the field:	November 15- November 18, 2013
Sample Size	732
Margin of Error	±3.62
Confidence Level	95%
Weighting Variables	Age , Race, Gender, & Phone Ownership

The Elon University Poll uses a stratified random sample of households with telephones and wireless (cell) telephone numbers. Please direct questions about the Elon University Poll's methodology to the Director of the Elon University Poll, Dr. Kenneth Fernandez at 336-278-6438 or kfernandez@elon.edu.

Procedures Used for Conducting the Poll

The Elon University Poll uses CATI system software (Computer Assisted Telephone Interviewing) for the administration of surveys. We attempt to reach each working telephone number in the sample up to five times. We only interview residents of North Carolina who are over 18. The Elon University Poll conducted the survey over a four-day period. Live interviewers called from 3 p.m. to 8 p.m. Friday (11/15); 11 a.m. to 8 p.m. on Saturday (11/16); 2p.m. to 7 p.m. on Sunday (11/17); and from 4:30 p.m. to 9:30 p.m. on Monday (11/18).

Additional Methodological Decisions

Branching Questions

For many questions with multiple response options, we program our surveys to branch into a secondary probing question.

"Don't Know" & "Refused" Response Options

All questions include an option for respondents to volunteer "don't know" or to refuse. In the vast majority of questions, interviewers do not prompt "don't know" responses.

Weighting

We typically weight results from the Elon University Poll on multiple demographic characteristics: race, gender, household size, region, education, and age. Weighting rarely leads to substantial changes in results. We use iterative raking, adjusting one dimension at a time. We include detailed information about weighting of survey samples for each poll on both the Elon University Poll website and within released reports.

Within Household Randomization

For landlines, we use the common "oldest-youngest" technique to ensure within household randomization. We assume cellphones belong to an individual rather than a household. Thus, we do not conduct within-household randomization within our cellphone sample.

Completion Criteria

An interview is a complete only if a respondent progresses through the entire survey. Respondents who hang up before completing the last question or who refuse to more than 10 % of the questions are incompletes.

Support for Transparency

The Elon University Poll supports transparency in survey research and is a supporter of the American Association for Public Opinion Research Transparency Initiative, which is a program promoting openness and transparency about survey research methods and operations among survey research professionals and the industry. All information about the Elon University Poll that we released to the public conforms to reporting conventions recommended by the American Association for Public Opinion Research and the National Council on Public Polls.

Question Construction and Question Order

In releasing survey results, the Elon University Poll provides the questions as worded and the order in which respondents receive these questions. In some cases question ordering rotates to avoid biases. In an effort to provide neutral, non-biased questions, we attempt to observe conventional question wording and question order protocols in all of our polls. In order to avoid recency or primacy effects, we randomize candidate names and directional response options (e.g. support / oppose) within the text of each question. We pretest every questionnaire multiple times before entering the field.

Sampling

Survey Sampling International, LLC, provide samples of telephone numbers. To equalize the probability of telephone selection, sample telephone numbers are systematically stratified according to subpopulation strata (e.g., a zip code, a county, etc.), which yields a sample from telephone exchanges in proportion to each exchange's share of telephone households in the population of interest. Estimates of telephone households in the population of interest are generally obtained from several databases. Samples of household telephone numbers are distributed across all eligible blocks of numbers in proportion to the density of listed households assigned in the population of interest according to a specified subpopulation stratum. Upon determining the projected (or preferred) sample size, a sampling interval is calculated by summing the number of listed residential numbers in each eligible block within the population of interest and dividing that sum by the number of sampling points assigned to the population. From a random start between zero and the sampling interval, blocks are selected systematically in proportion to the density of listed household "working blocks."

A block (also known as a bank) is a set of contiguous numbers identified by the first two digits of the last four digits of a telephone number. A working block contains three or more working telephone numbers. Exchanges are assigned to a population on the basis of all eligible blocks in proportion to the density of working telephone households. Once each population's proportion of telephone households is determined, then a sampling interval, based on that proportion, is calculated and specific exchanges and numbers are randomly selected.

The wireless component of the study sample starts with determining which area code-exchange combinations in North Carolina are included in the wireless or shared Telcordia types. Similar to the process for selecting household telephone numbers, wireless numbers involve a multi-step process in which blocks of numbers are determined for each area code-exchange combination in the Telcordia types. From a random start within the first sampling interval, a systematic nth selection of each block of numbers is performed and a two-digit random number between 00 and 99 is appended to each selected nth block stem. The intent is to provide a stratification that will yield a sample that is representative both geographically and by large and small carrier. From these, a random sample is generated.

Because exchanges and numbers are randomly selected, unlisted as well as listed numbers are included in the sample. Thus, the sample of numbers generated for the population of interest constitutes a random sample of telephone households and wireless numbers of the population.

Frequently Asked Questions about our Methodology

1. *Who pays for the Elon University Poll?*
Elon University fully funds the Elon University Poll.
2. *Does the Elon University Poll favor a certain party?*
The Elon University Poll is an academic, non-partisan survey. We do not engage or work with any political candidates or parties. We employ best practices to ensure the results are not biased.
3. *Where do you get your numbers?*
We obtain samples of randomized phone numbers from Survey Sample International.
4. *How many times do you call a number before giving up?*
We will attempt to call each working number up to five times before removing it from the sample.
5. *Do you call both cell phones and land lines?*
Yes. We use a mixed sample of both cell phones and landlines. We weight on phone ownership to adjust for the higher probability of selection of those who own both cell phones and landline phones.
6. *Does the Elon University Poll do IVR surveys or automated “robopolls”?*
No. Well-trained students at Elon University conduct all our interviews.
7. *Do you report non-response rates?*
Yes. We report non-response rates based on AAPOR guidelines. The response rate for the November 2013 Poll was 9.3%, which approximates or exceeds the

national average response rates of other high quality survey organizations. The response rate is calculated using the American Association of Public Opinion Research (AAPOR) formula RR4.

8. *Do you weight the data?*

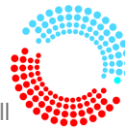
Yes. We apply weights to the data. An iterative proportional fitting algorithm generates weights based on Census parameters of residents in North Carolina.

9. *Do you randomize response options?*

Yes. We rotate the order of candidate names in all applicable questions. We also rotate order of text for other questions, such as those that include response options such as “more” and “less.” Furthermore, we rotate the order of some questions themselves if we suspect the order of a question could bias results.

10. *Do you conduct within-household randomization?*

Yes. For landlines, we use the common “oldest-youngest” rotation to ensure within household randomization. We assume cellphones belong to an individual rather than a household. Thus, we do not conduct within-household randomization within our cellphone sample.



The Elon University Poll Team

[Dr. Kenneth Fernandez](#) is the Director of the Elon University Poll. Dr. Fernandez holds a Ph.D. in Political Science from University of California – Riverside. Dr. Fernandez is Assistant Professor of Political Science and Policy Studies at Elon University. He has published numerous articles in peer-reviewed social science journals.



Fernandez

[Dr. Jason Husser](#) is the Assistant director. Dr. Husser holds a Ph.D. in Political Science from Vanderbilt University. Dr. Husser is also Assistant Professor of Political Science and Policy Studies at Elon University. He recently published an article on public opinion in the *American Journal of Political Science*. He was previously the Associate Coordinator of the Vanderbilt University Poll.



Husser

John Robinson serves as Director of Communications for the Poll. He is a former newspaper editor, veteran journalist, and North Carolina native.



Robinson

Daniel Anderson is Vice President of Elon University Communications. Eric Townsend is Director of the Elon University News Bureau. Both work very closely with the directors in communicating results of the poll.

Faculty members in the Department of Political Science, chaired by Dr. Sharon Spray, are also involved in advising the directors.

The poll operates under the auspices of the College of Arts and Sciences at Elon University, led by Dean Alison Morrison-Shetlar. The Elon University administration, led by Dr. Leo Lambert, president of the university, fully supports the Elon University Poll as part of its service commitment to state, regional, and national constituents.

Elon University fully funds the Elon University Poll. Because of this generous support, the Elon University poll does not engage in any contract work. This permits the Elon University Poll to operate as a neutral, non-biased, non-partisan resource.

Elon University students administer the survey as part of the University's commitment to civic engagement and experiential learning where "students learn through doing." Student interviewers receive extensive training prior to engaging in interviewing. A team of student supervisors (led by Mary Young '14) assists the directors with quality control and monitoring.

For more information on the Elon University Poll, visit www.elon.edu/elonpoll

Or contact:

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