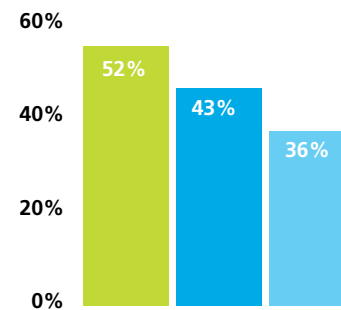


Deloitte 2008 annual holiday survey

Online and multichannel shopping

Online retailing continues to grow	
• % of people that will spend part of their holiday budget on the Internet	71%
• % of total spend that will be purchased on the Internet	24%
• % who will shop primarily/entirely online this holiday season	21%
• % who will do online research in advance of store purchases	70%

Given the economy...



- Consumers will look for "free shipping" from online retailers
- Consumers will research more items online
- Consumers will shop more online/catalogs to save on gas

"Particularly in this economic environment, a positive cross-channel experience can help retailers gain market share and differentiate their brands."

Stacy Janiak, vice chairman and U.S. Retail leader, Deloitte LLP

% of people who will increase or maintain the amount of shopping for gifts they do at each retail source:



56% of consumers purchased a product using multiple channels over the past year

• % purchased in store after viewing/researching on the same retailer's website or catalog	35%
• % purchased on a website after viewing the product in same retailer's store or catalog	23%
• % picked up in store after ordering/paying on same retailer's website	19%
• % purchased via catalog after viewing on the same retailer's website or in store	18%
• % purchased on the website then returned in same retailer's store	11%

9% of consumers will use their mobile phones to assist with shopping this holiday season.

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