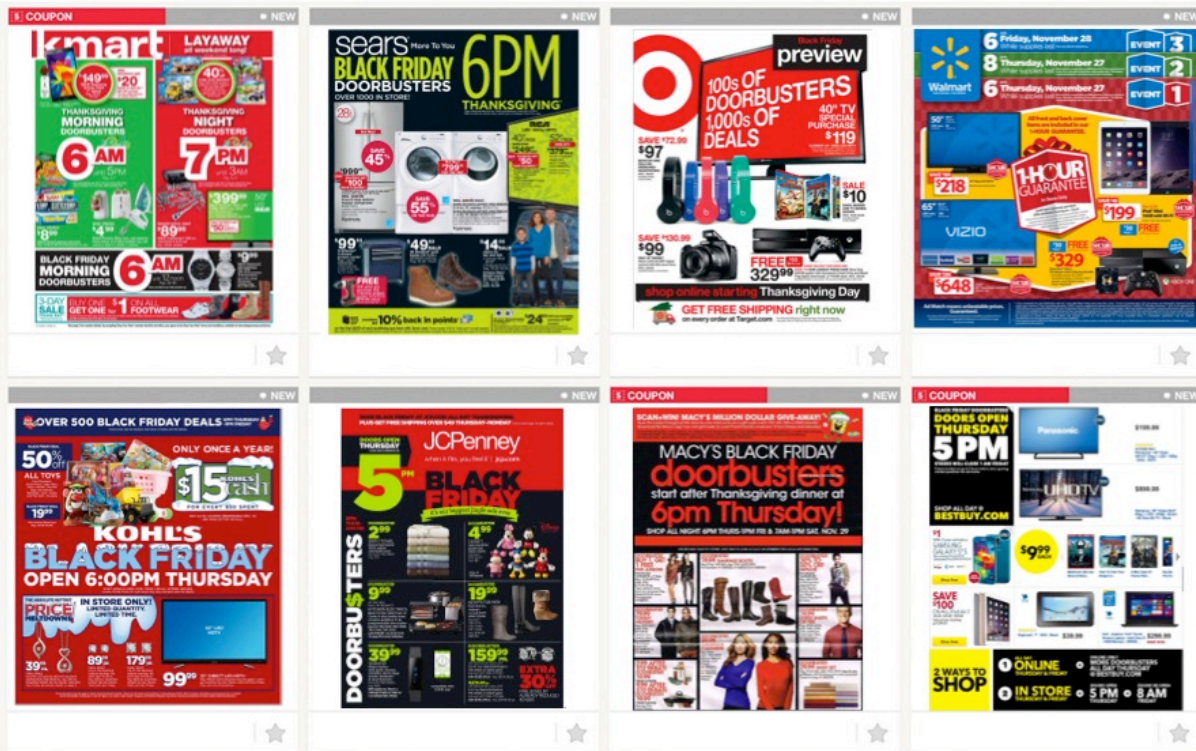


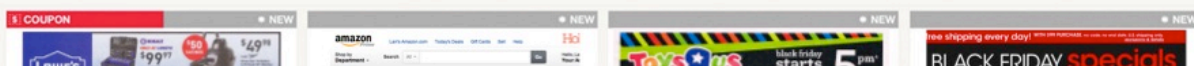
US RETAIL PROMOS

BLACK FRIDAY CAMPAIGNS

WEEK OF NOV. 10, 2014



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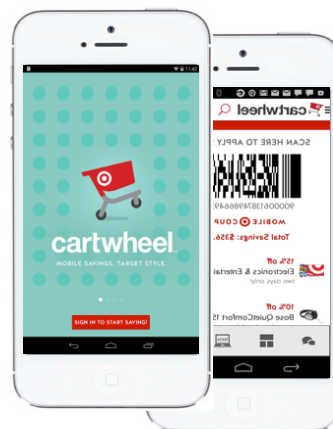
BLACK FRIDAY PREVIEW: MULTIPLE DAYS WITH MORE DEALS THAN EVER

US retailers started their campaigns for the biggest shopping event of the year – Black Friday over two weeks before the actual date November 28. To get the jump on their competitors, many retailers decided to offer earlier and deeper discounts this year for longer period of time, only to find that their rivals had the same idea. (FBIC HOLIDAY TOY PRICE TRACKING RESULTS on P.3)



TARGET Offers Early Access To Black Friday Deals

Target revealed its game plan for the shopping extravaganza two days before Walmart made its Black Friday announcement. Target is all about early access this year. It not only did a one-day-only sale for a handful of Black Friday deals on Nov. 10, but also will offer a Black Friday pre-sale on Nov. 26, the day before Thanksgiving, for select deals. All Target's Black Friday deals are also available on **Cartwheel**, its mobile app, between Nov. 23 and Nov. 29. Target is calling the upcoming Black Friday sale "the most digital" this year (despite the embarrassing data breach it suffered late last year). In addition, to further boost sales, Target is offering free shipping on all items ordered before Dec. 21.



WALMART'S Black Friday 2014 is a 5-Day Event

Walmart is taking promotions to another level this year. On Nov. 12, Walmart announced that for the first time it would extend its Black Friday deals to five days, from Thanksgiving Day to Cyber Monday (Nov. 27 – Dec. 1). Just like in the past two years, the 1-Hour Guarantee still applies, so that customers who get to the stores within the first hour of opening time are guaranteed select items at the sales price, even if the items are sold-out at the moment. And for the first time, to improve the customer experience, it will provide an interactive circular for online customers, with product reviews, buyer's guides, and how-to tutorials.





WHO'S WINNING THE BATTLE?

Target Offers Earlier and Larger Discounts than Walmart

At first glance, Target appears to be winning the race. Target announced its Black Friday plans two days earlier than Walmart and is also offering earlier access to deals. Target's prices are lower than Walmart's on 25 of the 30 items that we have been tracking – some are as much as 40% lower. The deepest discounted items included:

- Samsung 2.1-Channel Sound Bar System with Wired Subwoofer (\$87.99 at Target vs. \$131.59 at Walmart)
- RCA 7" Tablet (\$39.99 vs. \$59.99 at Walmart)
- Ninja Kitchen System Pulse Blender (\$49.99 vs. \$79.00 at Walmart)



MACY'S Black Friday Specials Focus on Deals for Apparel and Accessories

Early access is also essential to Macy's Black Friday campaign this year. Starting on November 20, customers can preview specials online and load items into their shopping carts for Thanksgiving Day. Starting at 6 PM on Thanksgiving, customers will be able to shop Macy's Black Friday deals. This year's specials focus on 30-50% off on apparel from Lucky Brand, Kensie, Bar III, Rachel Rachel Roy and more. For social media frenzies, the department store is offering previews on specials on Snapchat and Pinterest.

AMAZON Reveals Early Black Friday Deals with a Countdown Event

Amazon has dedicated a whole webpage to a Black Friday countdown event, offering up to 60% discounts on electronics, video games, DVDs and more. Customers can sign up for their daily deals emails to stay on top of their promotional deals. Even though Amazon's full Black Friday ad has yet to be published, the e-commerce giant has released its holiday toy list, featuring big savings on Frozen dolls, the LeapFrog LeapBand and Lego toys.



Toys "R" Us' Black Friday 2014 ad is 28-pages of great gift ideas for kids.

Whether you want to buy toys, puzzles, video games, electronics, dolls or action figures, Toys "R" Us is the one-stop shop for all the hot toys of the season. On Thanksgiving Day, shoppers will be able to enjoy 4 hours of specials from 5PM to 9PM.



FBIC HOLIDAY TOY PRICE TRACKING: WEEK OF NOV. 10

We are tracking a list of top toys from five retailers throughout the holiday season. Here are our first week's tracking results:

	TOYS	Amazon	K-Mart	Toys "R" Us	Target	Walmart
1.	Disney Frozen Snow Glow Elsa Singing Doll	\$49.95	\$34.99	\$34.99	\$29.99	\$28.88
2.	Teenage Mutant Ninja Turtles Battle Shell Leonardo/action figure 11"	\$21.99	\$21.99	n/a	\$19.99	\$14.99
3.	Doc McStuffins Get Better Talking Mobile Cart	\$59.99	\$44.99	\$44.99	n/a	\$44.97
4.	Leap Frog Leap TV Active Video Game System	\$146.50	\$149.99	\$149.99	\$149.99	\$179.97
5.	Vtech Kidizoom Smartwatch (\$49.99)	\$49.96	\$49.90	\$49.99	\$49.99	\$49.96
6.	Zoomer Dino*	\$79.88	\$89.99	\$79.99	\$79.99	\$79.88
7.	Simon Swipe Game*	\$14.76	\$19.99	\$14.99	\$14.79	\$14.76
8.	Lego Minecraft: The Village	\$31.99	\$34.99	\$31.99	\$31.99	\$31.99
9.	Nerf Zombie Strike SlingFire Blaster	\$26.00	\$22.99	\$22.39	\$19.99	\$24.88
10.	Transformers Age of Extinction Voyager Class Evasion Mode Optimus Prime Figure	\$18.99	\$22.49	\$23.99	\$18.99	\$22.00
11.	FurReal Friends Get Up & GoGo My Walkin' Pup Pet	\$39.88	\$54.99	\$49.99	\$49.99	\$39.88
12.	Hot Wheels Street Hawk Remote Control Flying Car	\$49.92	\$49.99	\$49.99	\$49.99	\$49.82