

Navigating the New Digital Divide

Capitalizing on digital influence in retail

For the third year, Deloitte studied over 3,000 U.S. consumers in late 2014-early 2015 to understand how their digital interactions are influencing in-store U.S. retail purchases. Many retailers are dramatically underestimating the influence of digital and are caught in a divide where they are making digital investments that primarily support their eCommerce business rather than their brick-and-mortar business. This year, the data clearly shows that digital influence continues to accelerate and shift the ground under the feet of retailers large and small alike.

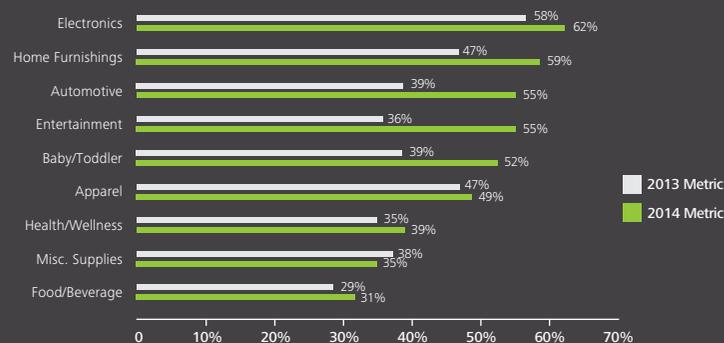
\$2,200,000,000,000

in brick and mortar retail sales will be influenced by digital by the end of 2015, or 64 percent of all in-store sales.

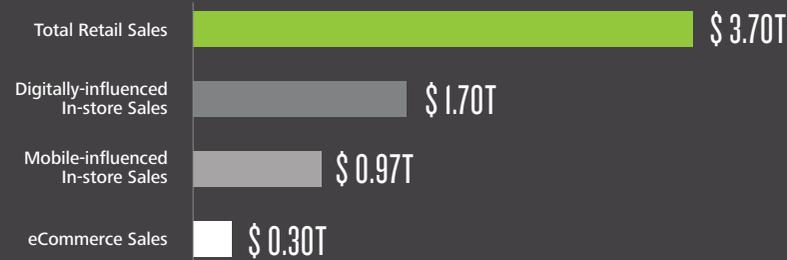
DIGITAL AND MOBILE INFLUENCE ON IN-STORE SALES



RETAIL CATEGORIES MOST AND LEAST INFLUENCED BY DIGITAL

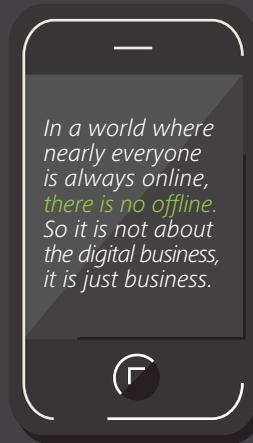


DOLLAR IMPACT COMPARISON BETWEEN DIGITALLY- & MOBILE-INFLUENCED SALES AND ECOMMERCE IN THE U.S., 2014¹



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“Nearly **one-in-three** shoppers say they spend more when they use digital as part of their shopping process.”



DIGITAL & SOCIAL MEDIA USAGE RESULT IN HIGHER CONVERSION & SPEND



THE CONSUMER'S SHOPPING JOURNEY IS INCREASINGLY SELF-DIRECTED



¹Channel sales calculated using U.S. Census Bureau Quarterly Retail E-Commerce Sales, 4th Quarter 2014, excluding gas stations and non-store retailers from physical store sales due to scope of survey. As used in this document, "Deloitte" means Deloitte Consulting LLP, a subsidiary of Deloitte LLP. Please see www.deloitte.com/us/about for a detailed description of the legal structure of Deloitte LLP and its subsidiaries. Certain services may not be available to attest clients under the rules and regulation of public accounting.