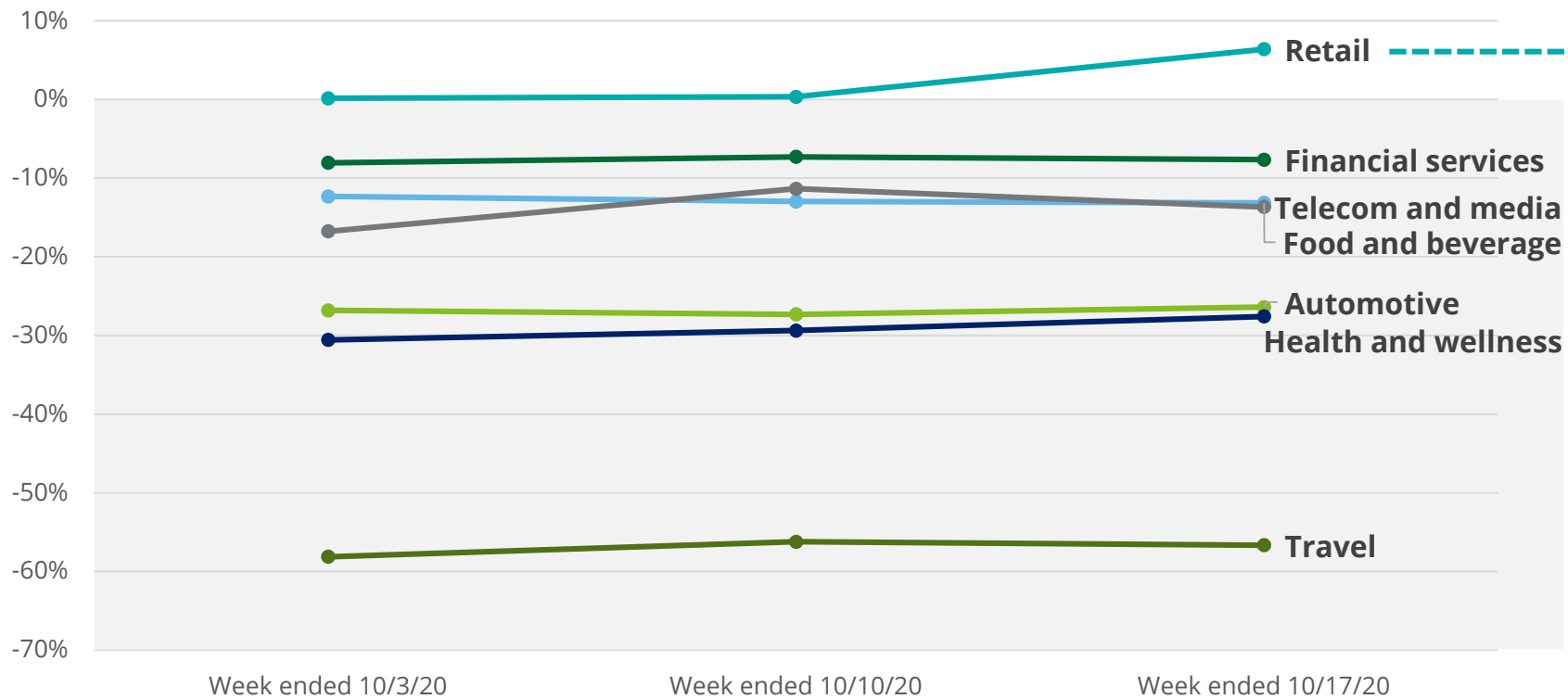




**2020 Deloitte holiday retail survey**  
Retail insights for holiday 2020: October pulse  
November 2020

Sales events from large retailers drove a 6% YoY spending increase for the retail sector in the third week of October to kick off the holiday season

**YoY change in consumer spending by sector<sup>1</sup>**  
(YoY % change)



**Sales events examples:<sup>2</sup>**

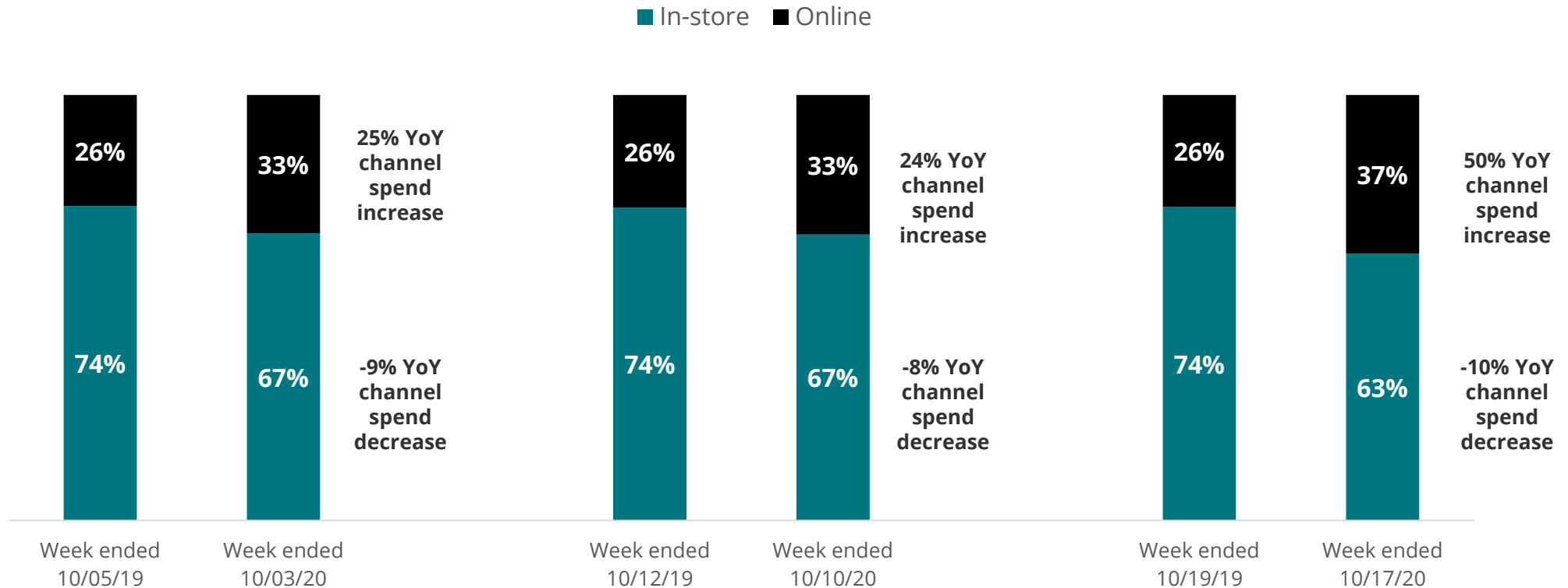
- Amazon “Prime Day”: 10/13 and 10/14
- Walmart “Big Save Event”: 10/11 to 10/15
- Target “Deal Days”: 10/13 and 10/14
- Best Buy “Black Friday in October”: starting 10/13

Source: <sup>1</sup> Affinity Solutions Inc.; Deloitte analysis; <sup>2</sup> <https://www.washingtonpost.com/business/2020/10/09/black-friday-amazon-target-walmart-holidays-2020>.

Note: Weeks aligned to consistent retail calendar; sectors reflect a representative set of organizations.

The digital nature of sales events resulted in an increase in share of spending online, even above the consistently higher online spending observed since the onset of the pandemic

Retail consumer spending share by channel



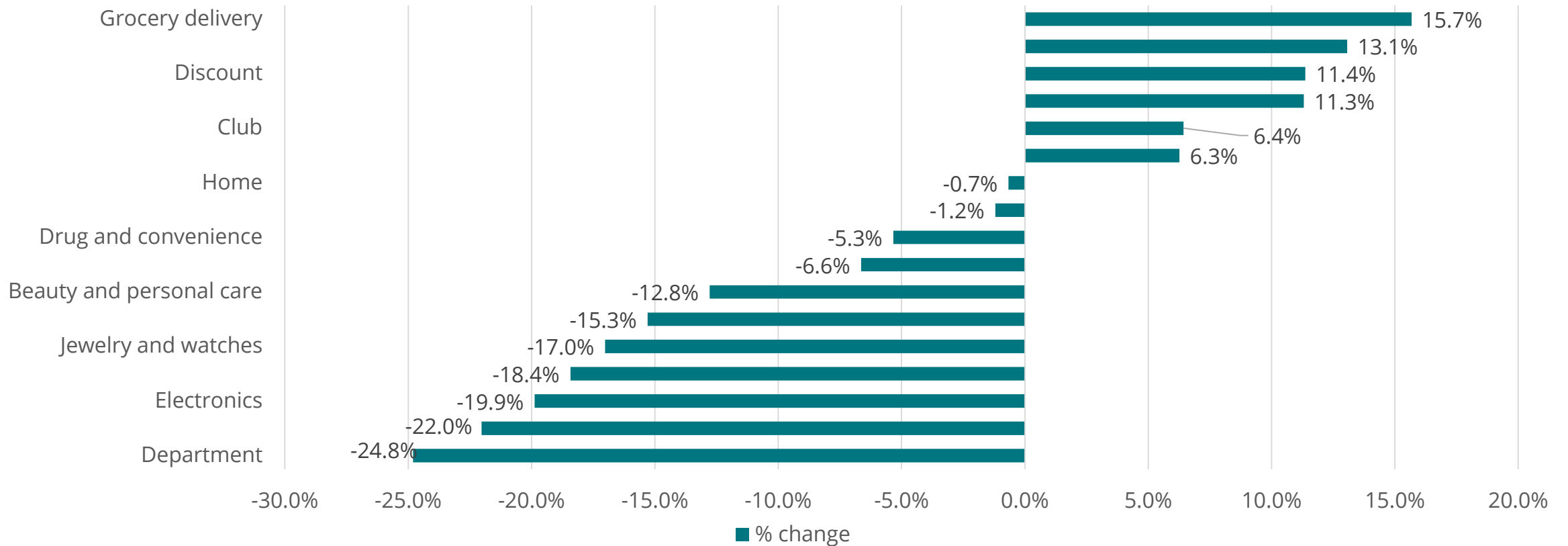
Source: Affinity Solutions Inc.; Deloitte analysis.

Note: Weeks aligned to consistent retail calendar; sectors reflect a representative set of organizations; data does not reflect cash transactions, so will overstate online penetration vs. actuals; data is presented for relative analysis; online spend includes transactions executed online and may include: delivery, curbside, and in-store pickup.

From the onset of the pandemic, retailers that offered essentials outperformed those that carried more status-related categories

**YoY change in consumer spending across retail subsectors**

*September 2019 to August 2020 vs. September 2018 to August 2019*

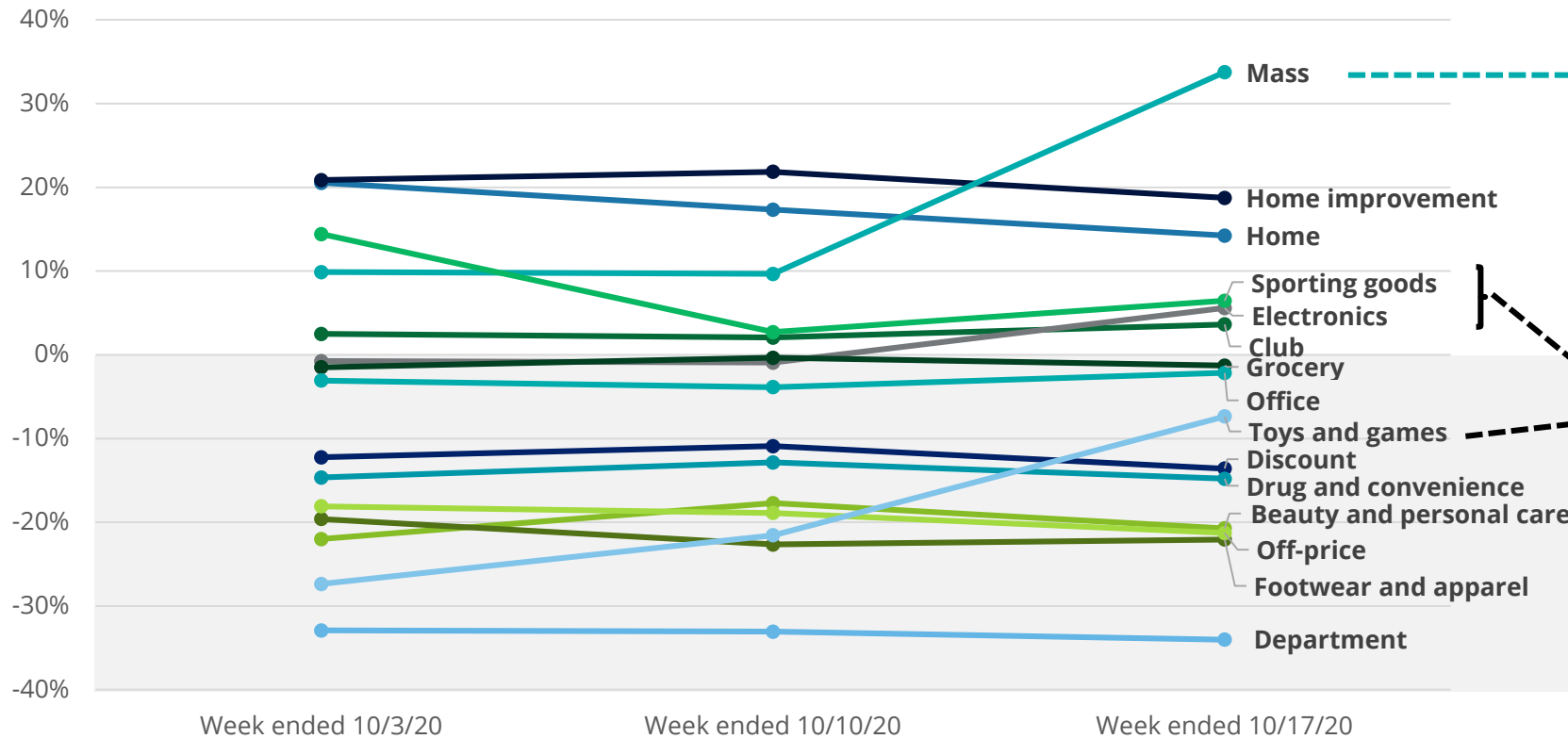


Source: Affinity Solutions Inc.; Deloitte analysis.

Notes: September 2019 to August 2020 vs. September 2018 to August 2019 subsectors reflect a representative set of retailers within each category; spending reflects both online and in-store transactions.

# Not all retail subsectors benefited: Mass retail drove the consumer spending increases during the sales events period in mid-October

**YoY change in consumer spending by retail subsector**  
(YoY % change)



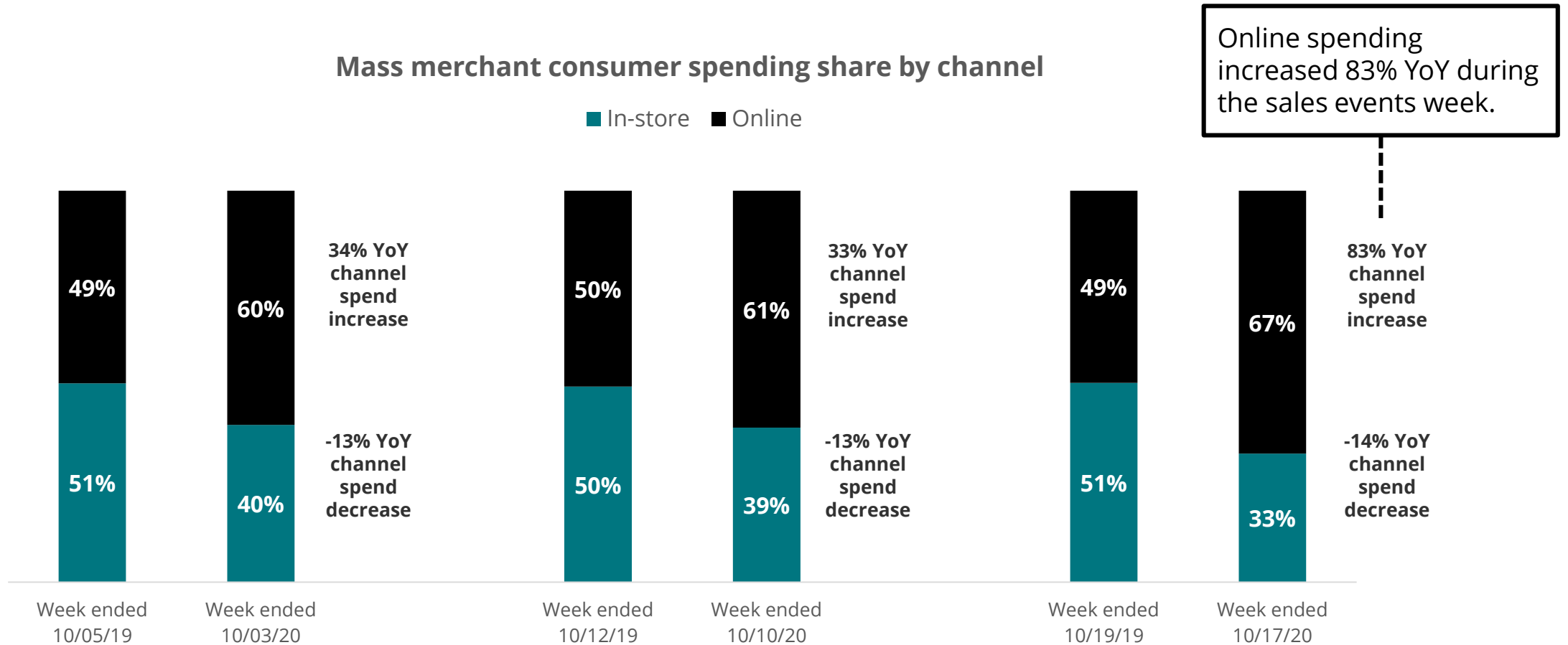
- Mass merchants have consistently seen spending increases since the COVID-19 pandemic began in March; they have been able to remain open, meet broad consumer needs, and deliver omnichannel shopping
- During the sales events week, mass merchant YoY spending change increased 3x over the previous two weeks

- Toys and games, electronics, and sporting goods retailers also received a spending bump during the sales events period, signaling an early start for these traditional holiday categories

Source: Affinity Solutions Inc.; Deloitte analysis.

Note: Weeks aligned to consistent retail calendar; sectors reflect a representative set of organizations.

The spending increase for mass merchants was digital, with B&M spending showing consistent YoY decreases

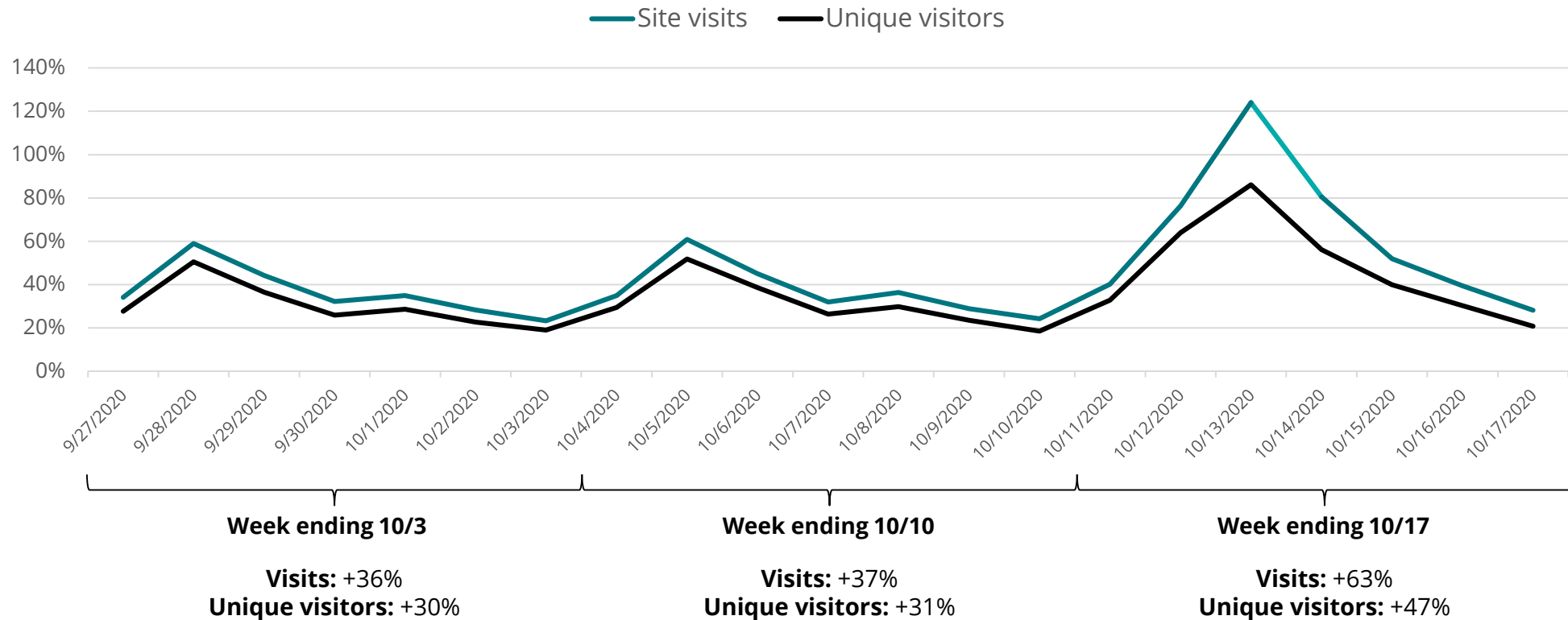


Source: Affinity Solutions Inc.; Deloitte analysis.

Note: Weeks aligned to consistent retail calendar; sectors reflect a representative set of organizations; data does not reflect cash transactions, so will overstate online penetration vs. actuals; data is presented for relative analysis; online spend includes transactions executed online and may include: delivery, curbside, and in-store pickup.

Increases in online mass merchant spend were driven by both an increase in unique customers and an increase in visits per customer

YoY change in online traffic to mass merchants



Source: SimilarWeb; Deloitte analysis.

Note: Weeks aligned to consistent retail calendar; sectors reflect a representative set of organizations.



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### Deloitte InSightIQ

Deloitte's InSightIQ capability provides access to a fact base of granular and frequent data sources across a broad spectrum of consumer behaviors to develop a deep understanding of consumers. InSightIQ was built with a belief that true consumer insight must come from a holistic approach that starts with an outside-in view and utilizes a broad mix of data sources, moving beyond a singular reliance on traditional survey research to leverage the wealth of data available today. To learn more, contact Jeff Simpson, principal, Deloitte Consulting LLP, [jesimpson@deloitte.com](mailto:jesimpson@deloitte.com); or Rob Bamford, senior manager, Deloitte Consulting LLP, [rbamford@deloitte.com](mailto:rbamford@deloitte.com).

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