



Deloitte.

Embracing retail disruption
2015 pre-Thanksgiving
pulse survey

November 23, 2015

Executive summary

Black Friday is expected to surpass Cyber Monday as the most popular online shopping day.

More than half (58%) of consumers surveyed have started their holiday gift spending, and on average have completed 20% of their holiday purchases (compared to 18% in 2014). About half (46%) of these holiday purchases were bought on sale or with a coupon (up from 41% in 2014).

Over half of respondents (57%) plan on shopping over the Thanksgiving weekend. Consumers continue to shift their Thanksgiving weekend spending toward online channels.

Retailer and Deal websites will be the primary information sources for Black Friday sales.

More than half (51%) of in-store Thanksgiving shoppers will start shopping by 6 pm; and 62% of Black Friday shoppers will start shopping by 9 am.

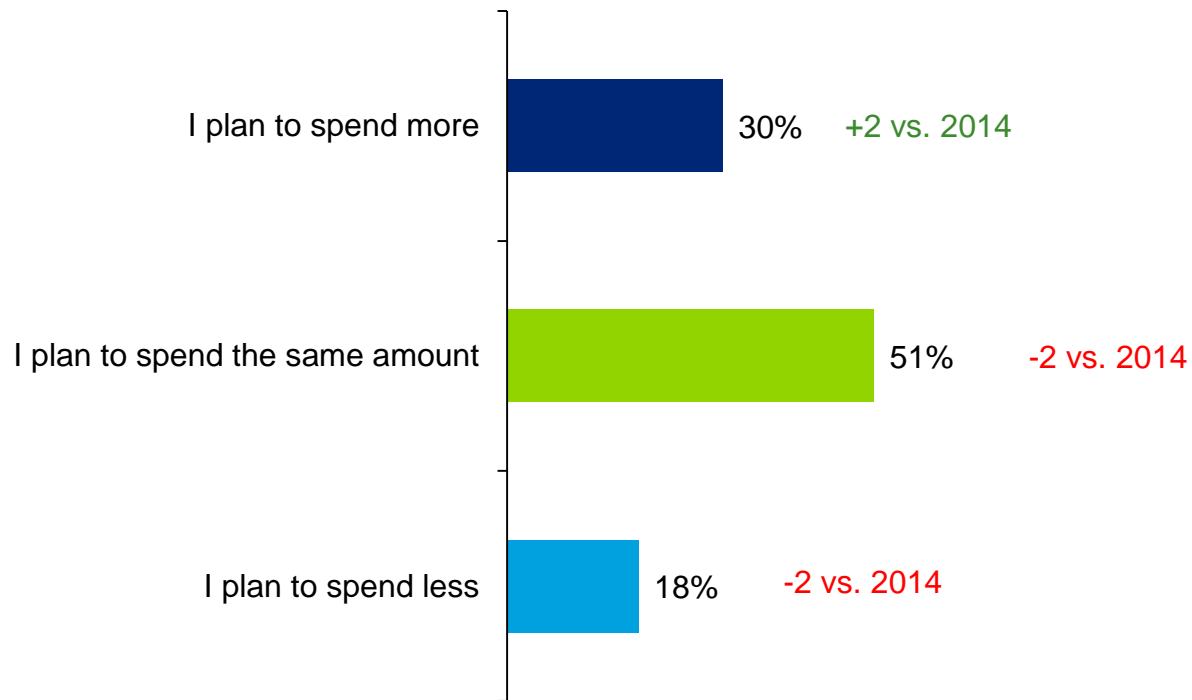
Nearly one third (30%) of respondents plan to shop the Saturday after Thanksgiving to support local businesses.

63% of consumers surveyed disagree with stores being open on Thanksgiving, with 56% feeling more loyal to those who close on Thanksgiving. Additionally, 50% will hold off purchasing if their preferred store is not open on either Thanksgiving or Black Friday.

Spending pulse check

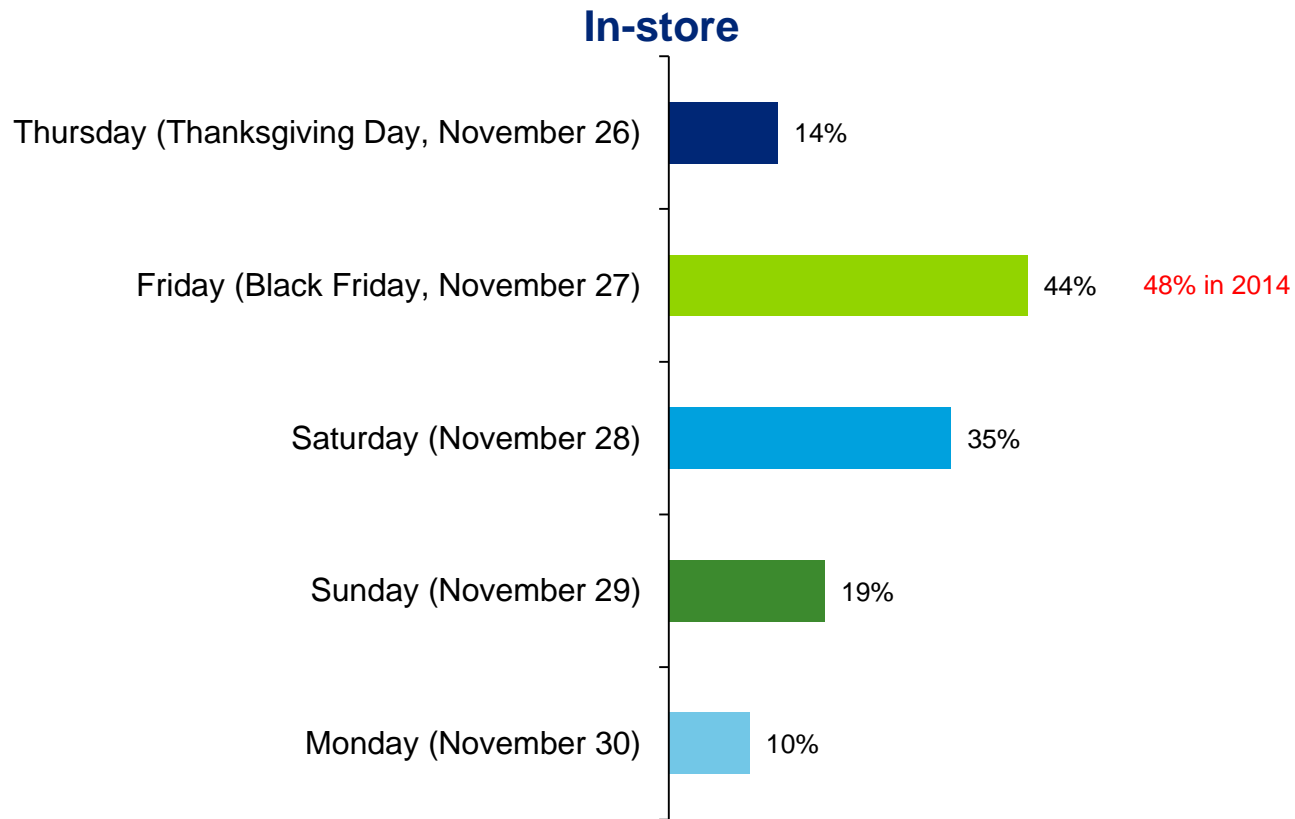
81 percent of respondents expect to spend the same or more as compared with their spending plans a few months ago (same as last year)

How do your holiday spending plans compare to just a month or two ago?

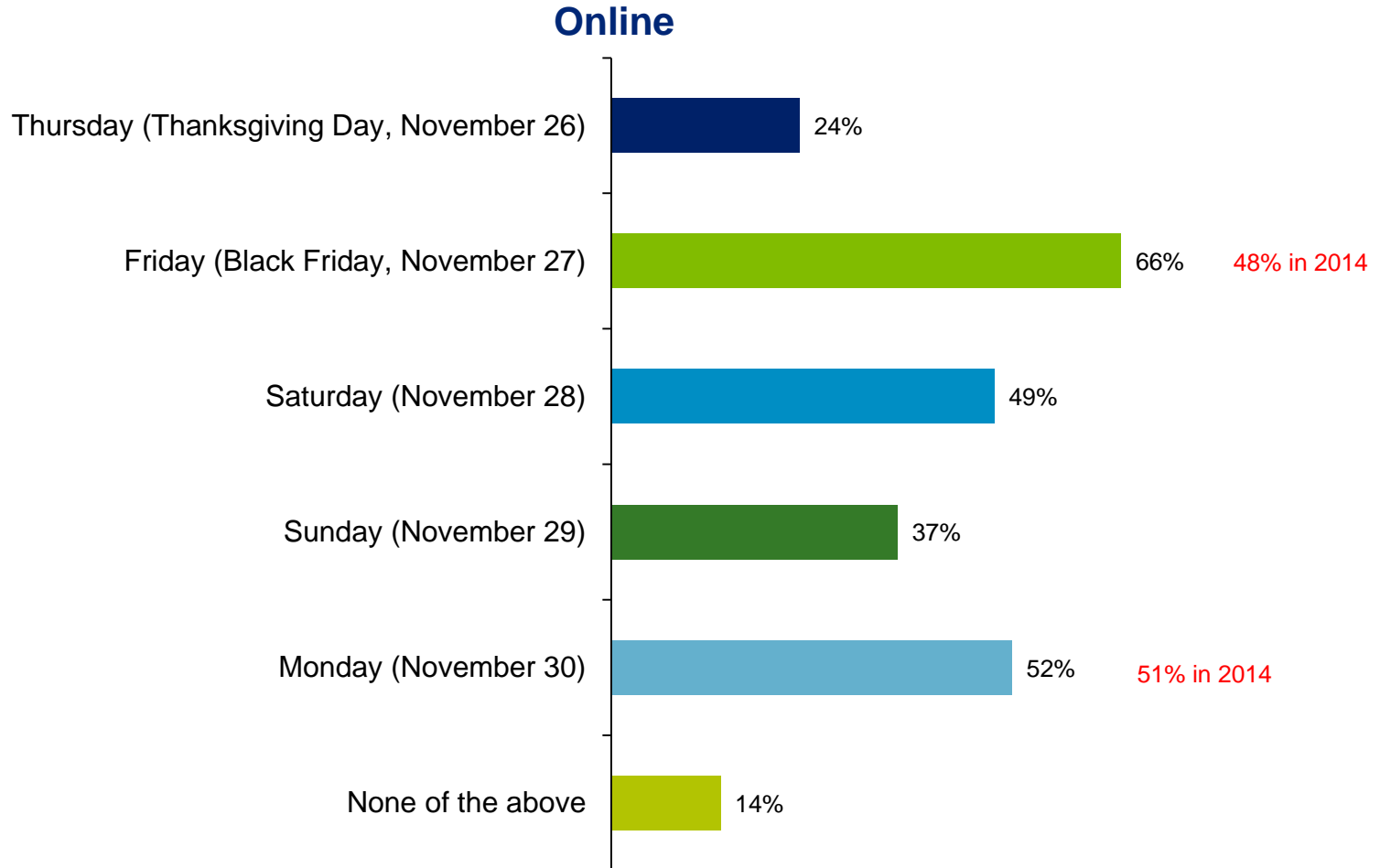


Shopping timing & venue plans

Black Friday and Saturday will remain the most popular in-store shopping days



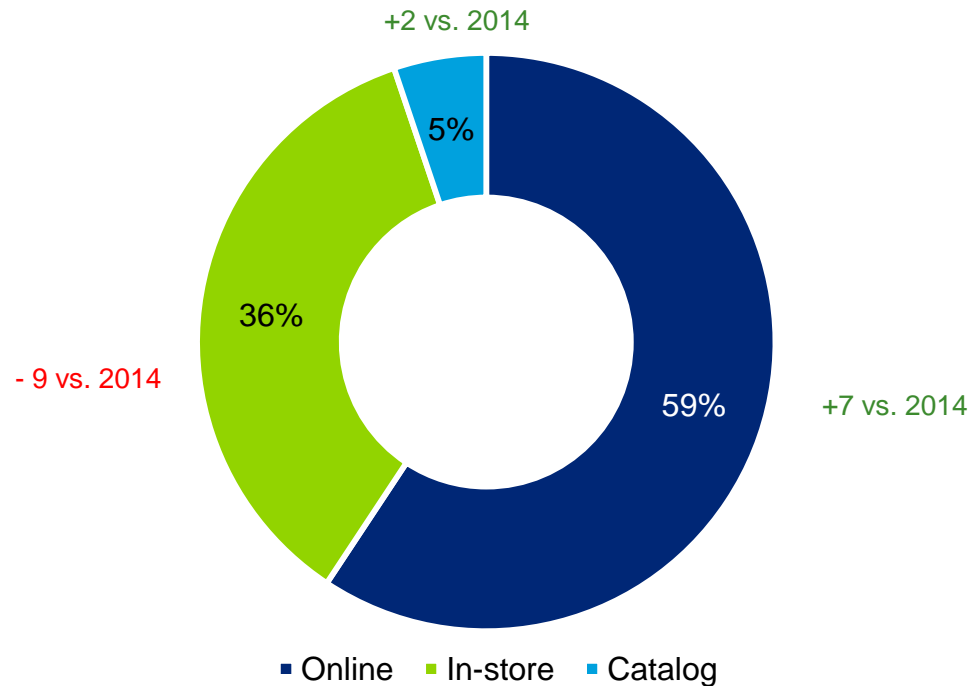
Black Friday to surpass Cyber Monday as the most popular online shopping day



Consumers continue to shift their Thanksgiving weekend spending to online channels

What percentage of your spending during the Thanksgiving weekend is expected to be through the following shopping channels?

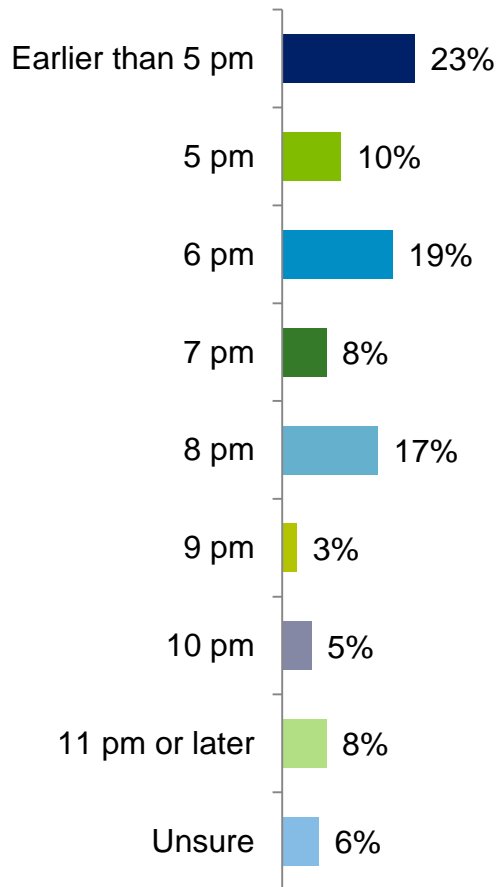
(Base: 57% shopping over the Thanksgiving weekend)



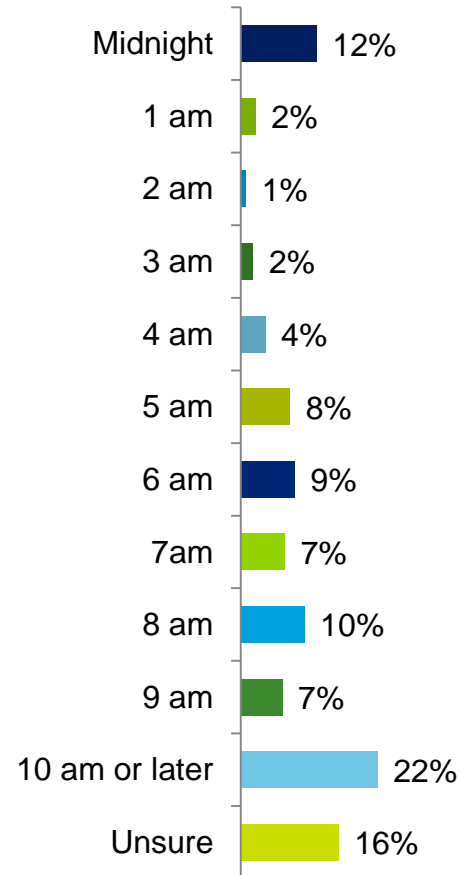
Among the 57% planning on shopping over the Thanksgiving weekend, 87% plan to shop online, while 53% plan to shop in-stores

More than half (51%) of Thanksgiving shoppers will start shopping by 6 pm; and 62% of Black Friday shoppers will start shopping by 9 am

What time do you expect to go to the store on Thanksgiving Day?
(Base: 14% shopping in stores on Thanksgiving Day)

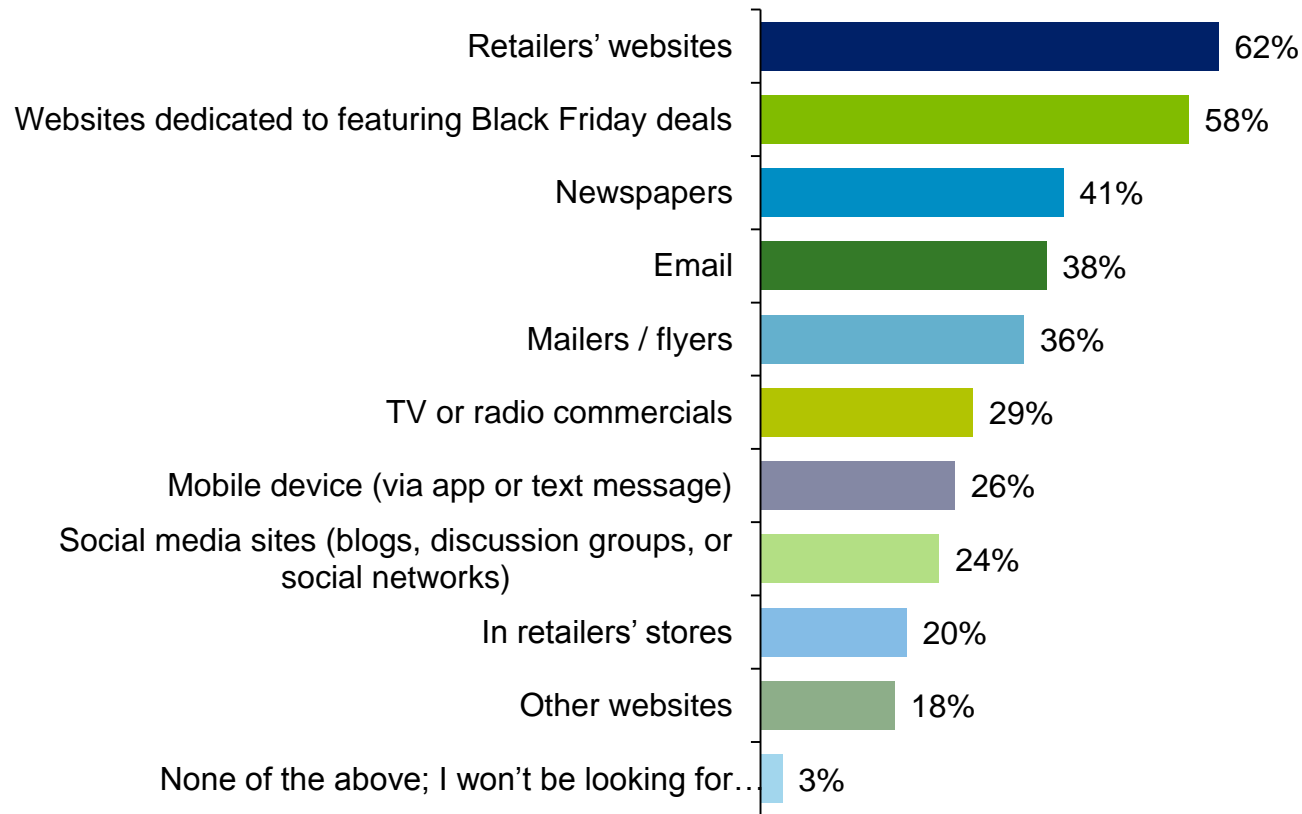


What time do you expect to go to the store on the Friday after Thanksgiving?
(Base: 44% shopping in stores on Thanksgiving Day)



Deal perceptions:
When and where

Retailer and Deal websites will be the primary information sources for Black Friday sales



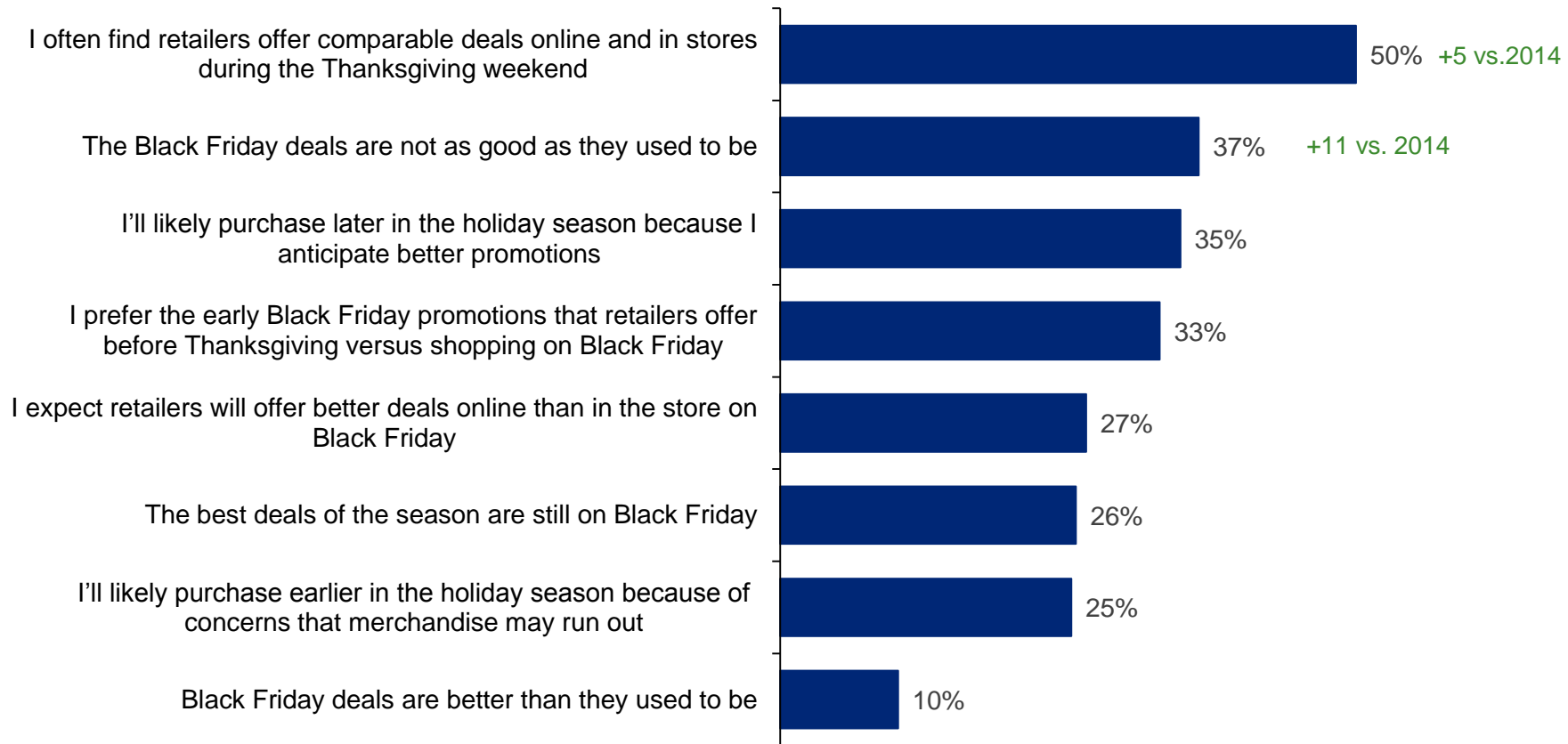
Percentages based on weekend holiday shopper base

Almost half (46%) of shoppers will spend no more than 1 hour researching Black Friday deals; another 40% expect to spend 1-2 hours researching deals

Consumer perceptions

Half of consumers find in-store & online deals to be comparable (up from 45% in 2014); 37% consumers say Black Friday deals aren't as good as they were

Consumer perceptions

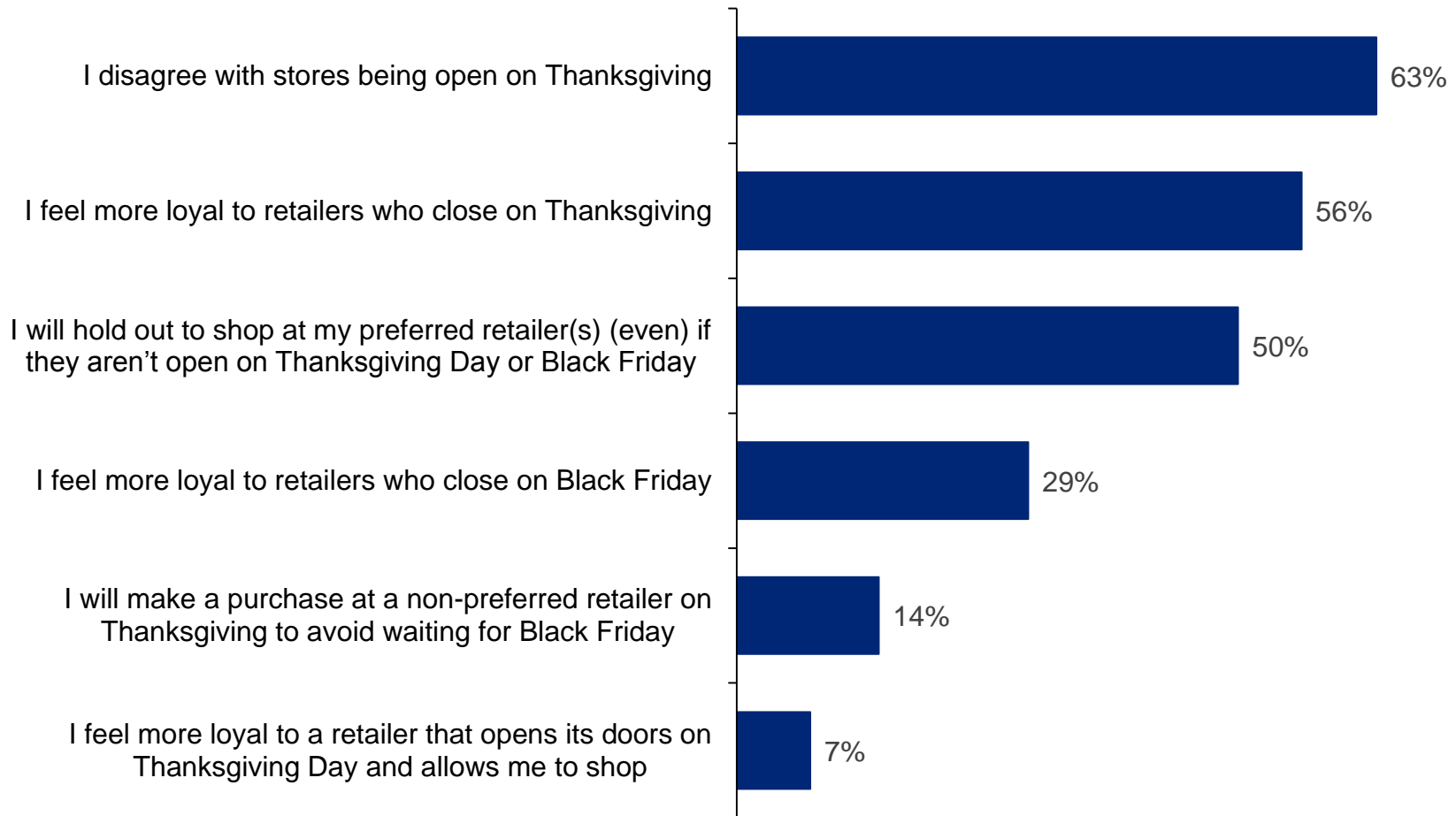


Percent of respondents who agree/strongly agree

Store hour impact on loyalty & perceptions

A majority (63%) of consumers disagree with stores being open on Thanksgiving, with 56% feeling more loyal to those who close on Thanksgiving.

Store hour impact on consumer perceptions & loyalty



About the survey

This survey was commissioned by Deloitte and conducted online by an independent research company between November 16-17, 2015.

It polled a national sample of 1,000 consumers and has a margin of error for the entire sample of plus or minus three percentage points.





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