2018 pre-Thanksgiving pulse survey
November 2018
Deloitte’s 2018 pre-Thanksgiving pulse survey: Key findings

**Thanksgiving Weekend Trends** (Thanksgiving Thursday – Cyber Monday)

- 36% of shoppers have not yet started their holiday shopping.¹
- Shoppers are expected to spend an average of $420 over the Thanksgiving period.
- 71% of holiday shoppers plan to shop over the Thanksgiving period.
- Of the Thanksgiving period shoppers, 89% of consumers plan to shop in-store and 91% plan to shop online.
- 88% say that compared to a month or two ago, they plan to spend the same or more (49% the same, 39% more).
- 45% of shoppers are undecided on which retailers they will shop over the Thanksgiving period.
- Consumers cite promotions and deals as the top reason to shop on Thanksgiving and Black Friday. Holiday rituals, as well as shopping with family and friends, are also important to Thanksgiving period shoppers.

**Top shopping days**

- On Thanksgiving day, the majority (60%) of shoppers plan to start before 7 p.m. – and the early shoppers plan to spend more than those who start later, at $128 on average.
- 81% of people shopping during the holiday week plan to do so on Black Friday.
- On Black Friday, 70% of consumers plan to shop in-store, and 50% plan to shop online. On Cyber Monday, 73% of consumers plan to shop online and 40% plan to shop in-store.
- Nearly three-quarters (73%) of Thanksgiving week shoppers plan to head online or to stores on Cyber Monday.
- Cyber Monday is the day expected to capture the most shopper dollars. Nearly half (47%) of all online spend for the Thanksgiving period is expected to occur on Cyber Monday.

¹. As of survey fielding period (October 31 – November 4, 2018)

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71% of consumers plan to shop during the Thanksgiving period, spending an average of $420

National average spend during Thanksgiving period: $420

% of shoppers who have not yet started their holiday shopping*

36%

% of shoppers who will shop during the Thanksgiving period

71%

*Budget spent as of survey fielding period (October 31 – November 4, 2018)
Nearly 90% of holiday shoppers expect to spend the same or more than they originally planned, with gifts leading the way.

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

- Expect to spend the same: 49%
- Expect to spend more: 39%
- Expect to spend less: 12%

On what will shoppers spend more?

(Among 39% who plan to spend more)

- Gifts: 82%
- Gift cards/gift certificates: 46%
- Entertaining at home: 35%
- Socializing away from home: 33%
- Home / holiday furnishings: 29%
- Non-gift clothing for yourself or family: 27%

Question(1): “How do your overall holiday spending plans compare to just a month or two ago?” (N=1,200)
Question(2): “On which of the following will you spend more than you planned you would a month or two ago?” (n=472)

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Seven in ten holiday shoppers plan to shop during the Thanksgiving weekend, using a mix of online and offline channels.

**Plan to shop during Thanksgiving period**  
*(Thanksgiving Day through Cyber Monday)*

- Yes: 71%
- No: 29%

**Among shoppers who plan to shop**  
*(Thanksgiving Day through Cyber Monday)*

- 89% plan to shop in-store
- 91% plan to shop online

Question: "Do you expect to do any shopping either online or in-store over the Thanksgiving period – including Thanksgiving Thursday through the following Monday?" (N=1,200)
Online is likely to account for half of expected spend during the Thanksgiving period

<table>
<thead>
<tr>
<th>Shopping Channel</th>
<th>2018 Share of spend</th>
<th>2018 Average spend</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Online</strong></td>
<td>50%</td>
<td>$210</td>
</tr>
<tr>
<td><strong>In-store</strong></td>
<td>45%</td>
<td>$190</td>
</tr>
<tr>
<td><strong>Catalog/Other</strong></td>
<td>5%</td>
<td>$20</td>
</tr>
</tbody>
</table>

(Among all Thanksgiving period shoppers)

Question(1): Approximately how much do you plan to spend on shopping from Thanksgiving Thursday through the following Monday? (n=856)

Question(2): Approximately, what percentage of your spending during the Thanksgiving weekend is expected to be through the following shopping channels – online, in-store, catalog/other? (n=856)

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Black Friday is expected to draw the biggest in-store crowds while Cyber Monday will attract more shoppers online.

**In-store**

89% plan to shop
(Among *in-store* Thanksgiving period shoppers)

- Thanksgiving Day: 26%
- Black Friday: 70%
- Saturday: 50%
- Sunday: 30%
- Cyber Monday: 40%

**Online**

91% plan to shop
(Among *online* Thanksgiving period shoppers)

- Thanksgiving Day: 29%
- Black Friday: 50%
- Saturday: 30%
- Sunday: 25%
- Cyber Monday: 73%

Question(1): “On what days do you expect to shop in-store?” (n= 762)
Question(2): “On what days do you expect to shop online?” (n= 775)

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While Black Friday will likely account for most shopper traffic, Cyber Monday is expected to capture the most shopper dollars.

**Preferred shopping days**

(% of active Thanksgiving period shoppers across in-store and online)

- **Thanksgiving**: 38%
- **Black Friday**: 81%
- **Saturday**: 57%
- **Sunday**: 39%
- **Cyber Monday**: 73%

**Avg. spend by day ($)**
- **Thanksgiving**: $138
- **Black Friday**: $160
- **Saturday**: $101
- **Sunday**: $71
- **Cyber Monday**: $170

**Question(1):** “On what days do you expect to shop in-store or online?” (n = 856)

**Question(2):** “Out of your plan to spend in-store or online during Thanksgiving period, how much do you plan to spend shopping in-store or online on following days (on non-grocery items)”? (n = 856)

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In-store shopper traffic and spend at physical stores is likely to peak on Black Friday

**Active in-store shoppers (%) by day**
*(Among in-store shoppers throughout Thanksgiving period)*

<table>
<thead>
<tr>
<th>Day</th>
<th>26%</th>
<th>70%</th>
<th>50%</th>
<th>30%</th>
<th>40%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thanksgiving</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black Friday</td>
<td>26%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Saturday</td>
<td></td>
<td>50%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sunday</td>
<td></td>
<td></td>
<td>30%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cyber Monday</td>
<td></td>
<td></td>
<td></td>
<td>40%</td>
<td></td>
</tr>
</tbody>
</table>

**Avg. in-store spend ($)**

- Thanksgiving: $114
- Black Friday: $126
- Saturday: $87
- Sunday: $56
- Cyber Monday: $74

**Share of in-store spend (%)**

- Thanksgiving: 14%
- Black Friday: 43%
- Saturday: 21%
- Sunday: 8%
- Cyber Monday: 14%

**Key shopping day**

Question(1): “On what days do you expect to shop in-store?” (n= 762)
Question(2): “Out of your plan to spend in-store during Thanksgiving period, how much do you plan to spend shopping in physical stores on following days (on non-grocery items)?”

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Nearly half of total online spend during the Thanksgiving period is expected to occur on Cyber Monday.

**Active online shoppers (%) by day**
(Among online shoppers throughout Thanksgiving period)

- **Thanksgiving**: 29%, Avg. online spend ($): $99, Share of online spend (%): 13%
- **Black Friday**: 50%, Avg. online spend ($): $113, Share of online spend (%): 25%
- **Saturday**: 30%, Avg. online spend ($): $69, Share of online spend (%): 9%
- **Sunday**: 25%, Avg. online spend ($): $57, Share of online spend (%): 6%
- **Cyber Monday**: 73%, Avg. online spend ($): $148, Share of online spend (%): 47%

Question(1): “On what days do you expect to shop online?” (n= 775)
Question(2): “Out of your plan to spend online during Thanksgiving period, how much do you plan to spend shopping online on following days (on non-grocery items)?”

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Convenience and price matter to Thanksgiving period shoppers
Consumers look to save time when shopping across channels, as well as take advantage of better deals online and through promotions.

**Shopper digital preferences during Thanksgiving period***
*(Among all Thanksgiving period shoppers)*

- **If online sites have technical issues will use another retailer rather than wait**: 51%
- **Buy something online while in-store due to better pricing and/or price matching**: 41%
- **Influenced by deals from mobile device while in store during Thanksgiving weekend**: 39%
- **Connect to a retailer’s Wi-Fi network while shopping in-store**: 38%
- **Check-out using mobile device in store to avoid long lines at the register**: 27%
- **Connect to a retailer’s Wi-Fi network in store to take advantage of augmented reality apps**: 24%

*(2017 survey figures)*

* Percentage of respondents who selected ‘Agree’ or ‘Strongly Agree’

Question: “Using a scale of 1 through 5, where 1 means “Strongly disagree” and 5 means “Strongly agree”, please state how much you agree with the following:” (n=856)

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61% of shoppers are likely to visit stores with family and friends during the Thanksgiving period, a trend driven mostly by younger shoppers.

**Share of respondents (%) who plan to shop in-store with family/friends**

*(Among in-store shoppers throughout Thanksgiving period)*

- **GenZ**: 76%
- **Millennials**: 65%
- **GenXers**: 63%
- ** Boomers**: 55%
  - (Ages 54–71, born 1947–1964)
- **Seniors #**: 30%
  - (Ages 72 and above, born 1946 or earlier)
- **Overall**: 61%
  
# - Sample size less than 30 respondents

Single-select question

Question: "Do you expect to shop together with other family members or friends in-store over the Thanksgiving period?" (n=762)

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SHOPPING ON THANKSGIVING DAY
Shoppers plan to spend $114 in-store on Thanksgiving Day, with three-fifths of shoppers who spend the most planning to start before 7 p.m.

**Thanksgiving Day shopping start time and spend**
*(Among in-store shoppers on Thanksgiving Day)*

**Average spend**

- Before 3 pm: $118, 15%
- 3pm to 5 pm: $141, 28%
- 6 pm: $124, 17%
- 7pm to 10 pm: $96, 28%
- 11 pm or later #: $74, 4%
- Unsure #: $75, 9%

# - Sample size less than 30 respondents

Question: “What time do you expect to go to the store on Thanksgiving Day?” (n= 199)  

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Deals and promotions draw shoppers in-store on Thanksgiving Day
On Thanksgiving Day, more than two-thirds of holiday shoppers plan to shop in-store to benefit from promotions

**Why shoppers plan to shop in-store on Thanksgiving Day**
*(Among in-store shoppers on Thanksgiving Day)*

- Do not want to miss the best deals: 68%
- Enjoy shopping with family/friends or part of Thanksgiving ritual: 55%
- After Thanksgiving celebration, it's something/somewhere to do/go: 26%
- To avoid the crowds or the experience of Black Friday: 20%

Multi-select question
Question: "Why will you be shopping in-store on Thanksgiving Thursday?" (n= 199)
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Almost half of the shoppers will hold back on shopping if their favorite retailers are closed on Thanksgiving Day

**Attitudes toward shopping on Thanksgiving Day***

*Among all Thanksgiving period shoppers*

<table>
<thead>
<tr>
<th>Attitude</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I will hold out to shop at my favorite retailer(s) if they aren’t open</td>
<td>48%</td>
</tr>
<tr>
<td>I will make a purchase at other retailers if my favorite retailer remains closed on Thanksgiving Day</td>
<td>38%</td>
</tr>
<tr>
<td>I feel loyal to retailers that are open on Thursday and allow me to shop</td>
<td>28%</td>
</tr>
</tbody>
</table>

* Percentage of respondents who selected ‘Agree’ or ‘Strongly Agree’

*Question: “Using a scale of 1 through 5, where 1 means “Strongly disagree” and 5 means “Strongly agree”, please state how much you agree with the following:” (n=856)*
SHOPPING ON BLACK FRIDAY
Shoppers are likely to spend $126 on average in-store on Black Friday, with early morning shoppers outspending others.

By 9 a.m., nearly three-quarters of consumers have already started shopping.

### Black Friday shopping start time and spend
(Among in-store shoppers on Black Friday)

<table>
<thead>
<tr>
<th>Average spend</th>
<th>Midnight (Thursday)</th>
<th>1 am to 5 am</th>
<th>6 am</th>
<th>7 am to 9 am</th>
<th>10 am or later</th>
<th>Unsure</th>
</tr>
</thead>
<tbody>
<tr>
<td>$115</td>
<td>11%</td>
<td>20%</td>
<td>14%</td>
<td>27%</td>
<td>17%</td>
<td>12%</td>
</tr>
<tr>
<td>$159</td>
<td></td>
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<td></td>
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<tr>
<td>$141</td>
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<td></td>
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<tr>
<td>$126</td>
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<td>$98</td>
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<tr>
<td>$103</td>
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</tbody>
</table>

Question: "What time do you expect to go to the store on the Friday after Thanksgiving day ("Black Friday")? (n= 531)"
Deals and promotions remain a major driver of foot traffic in-stores on Black Friday

**Why shoppers plan to shop in-store on Black Friday**
(Among in-store shoppers on Black Friday)

- To take advantage of sales or best deals of the season: 82%
- Enjoy shopping with family/friends or as part of Black Friday ritual: 46%
- Overall excitement of the day: 33%
- I prefer shopping in the store rather than online: 23%
- I want to complete my shopping before December: 21%
- Many stores are opening earlier which provides more hours in the day to shop: 18%

Multi-select question
Question: "Why will you be shopping in-store on Black Friday?" (n= 531)
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Over half of Thanksgiving period shoppers associate Black Friday with the best deals of the season

**Attitudes toward shopping on Black Friday***
(Among all Thanksgiving period shoppers)

<table>
<thead>
<tr>
<th>Attitude</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I plan to take advantage of early Black Friday deals online</td>
<td>63%</td>
</tr>
<tr>
<td>The best deals of the season are on Black Friday</td>
<td>56%</td>
</tr>
<tr>
<td>I rely on Black Friday as much as I used to for holiday shopping</td>
<td>44%</td>
</tr>
<tr>
<td>Black Friday deals are better than they used to be</td>
<td>43%</td>
</tr>
<tr>
<td>I expect retailers will offer better deals online than in the store on Black Friday</td>
<td>41%</td>
</tr>
</tbody>
</table>

* Percentage of respondents who selected ‘Agree’ or ‘Strongly Agree’

Question: “Using a scale of 1 through 5, where 1 means “Strongly disagree” and 5 means “Strongly agree”, please state how much you agree with the following:” (n=856)

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SHOPPING PREFERENCES
Clothing, electronics, and toys are likely to top Thanksgiving period shopping lists this season

**Popular Thanksgiving Categories**
(Among Thanksgiving period shoppers buying each category)

- **72%**
  Clothing & Accessories
  (e.g. clothing, shoes, jewelry)

- **57%**
  Electronics & Accessories
  (e.g. computers, smartphone, gaming consoles, wearables)

- **57%**
  Toys & Hobbies
  (e.g. books, board games, dolls, movies, handcraft items)

- **36%**
  Food & Beverage
  (e.g. confectionary, meal kits, liquor)

- **31%**
  Home & Kitchen
  (e.g. home improvement, home appliances and electronics, furniture)

- **31%**
  Health & Beauty
  (e.g. cosmetics, personal care products, sporting goods)

Question: "Which of the following do you plan to buy during this Thanksgiving period (Thanksgiving Thursday through the following Monday)?" (n=856)
Among **in-store shoppers**, mass merchants and traditional department stores are likely to be the most preferred venue. However, online retailers also play a role for consumers who plan to shop in-store.

### Most preferred retail venues for Thanksgiving shopping

*(Among consumers who will shop in-store throughout Thanksgiving period)*

<table>
<thead>
<tr>
<th>Retail Venue</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass merchants</td>
<td>45%</td>
</tr>
<tr>
<td>Traditional department stores</td>
<td>43%</td>
</tr>
<tr>
<td>Electronics/Office supply/Computer stores</td>
<td>33%</td>
</tr>
<tr>
<td>Internet/online retailers (incl. auction sites)</td>
<td>33%</td>
</tr>
<tr>
<td>Outlet stores/centers</td>
<td>22%</td>
</tr>
<tr>
<td>Specialty clothing stores</td>
<td>19%</td>
</tr>
<tr>
<td>Supermarkets or grocery stores</td>
<td>19%</td>
</tr>
<tr>
<td>Warehouse membership clubs</td>
<td>19%</td>
</tr>
<tr>
<td>Retailer website or mobile app</td>
<td>17%</td>
</tr>
<tr>
<td>Fast fashion apparel retailers</td>
<td>13%</td>
</tr>
<tr>
<td>Dollar stores</td>
<td>13%</td>
</tr>
<tr>
<td>Home improvement stores</td>
<td>12%</td>
</tr>
<tr>
<td>Jewelry stores</td>
<td>9%</td>
</tr>
<tr>
<td>Off-price stores</td>
<td>8%</td>
</tr>
<tr>
<td>Drug stores</td>
<td>6%</td>
</tr>
</tbody>
</table>

45% of shoppers are undecided on which retailers they will shop.

Question: "At which of the following types of retailers will you likely shop during this Thanksgiving period?" (n=762)
RESEARCH TO PREPARE FOR SHOPPING
Brand matters, as retailer websites top the list of likely information sources

Digital channels are likely to be the primary information source for shoppers during the Thanksgiving period

<table>
<thead>
<tr>
<th>Information Source</th>
<th>Online Shoppers Expecting Information (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retailer Websites</td>
<td>59%</td>
</tr>
<tr>
<td>Websites dedicated to featuring Thanksgiving deals</td>
<td>52%</td>
</tr>
<tr>
<td>Newspapers</td>
<td>28%</td>
</tr>
<tr>
<td>TV or radio commercials</td>
<td>28%</td>
</tr>
<tr>
<td>Mailers/ flyers</td>
<td>27%</td>
</tr>
<tr>
<td>Social media sites (blogs, discussion groups, or social networks)</td>
<td>26%</td>
</tr>
<tr>
<td>Email</td>
<td>26%</td>
</tr>
<tr>
<td>In-retailers’ stores</td>
<td>21%</td>
</tr>
<tr>
<td>Mobile device (via app or text message)</td>
<td>21%</td>
</tr>
<tr>
<td>Other websites</td>
<td>16%</td>
</tr>
</tbody>
</table>

Question: "Where do you expect to obtain information about Thanksgiving weekend?" (n= 775)

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While awareness about ‘Giving Tuesday’ might be low across generations, younger shoppers are most likely to participate.

**Are you planning to participate in ‘Giving Tuesday’ this year?**  
(\% of shoppers)

- **No, will not participate**
- **Yes, will participate**
- **Not aware about ‘Giving Tuesday’**

<table>
<thead>
<tr>
<th>Generation</th>
<th>Overall Participation</th>
<th>GenZ</th>
<th>Millennials</th>
<th>GenX</th>
<th>Boomer</th>
<th>Senior</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ages 18–23, born 1995–2000</td>
<td>48%</td>
<td>35%</td>
<td>22%</td>
<td>14%</td>
<td>16%</td>
<td>9%</td>
<td>18%</td>
</tr>
<tr>
<td>Ages 24–41, born 1977–1994</td>
<td>52%</td>
<td>26%</td>
<td>26%</td>
<td>21%</td>
<td>22%</td>
<td>23%</td>
<td>58%</td>
</tr>
<tr>
<td>Ages 42–53, born 1965–1976</td>
<td>60%</td>
<td>26%</td>
<td>26%</td>
<td>16%</td>
<td>9%</td>
<td>22%</td>
<td>69%</td>
</tr>
<tr>
<td>Ages 54–71, born 1947–1964</td>
<td>63%</td>
<td>21%</td>
<td>21%</td>
<td>21%</td>
<td>21%</td>
<td>21%</td>
<td>63%</td>
</tr>
<tr>
<td>Ages 72 and above, born 1946 or earlier</td>
<td>69%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>69%</td>
</tr>
</tbody>
</table>

Question: Are you planning to participate in ‘Giving Tuesday’ (on 27th Nov, a global day dedicated to making charitable donations through a non-profit organization or program) this year? (N=1,200)

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About the survey

Survey Methodology

The survey was developed by Deloitte and conducted online by an independent research company between October 31 –November 4, 2018.

It polled a national sample of 1,200 adults (age 18+) aligned with the US Census for age and household income who plan to shop during the holiday season and has a margin of error for the entire sample of plus or minus three percentage points.

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