

## Stores Key to Consumers' Omni-Channel Strategies on Thanksgiving Day/Black Friday

*Additional Purchases Derive From Shoppers Who "Click-and-Collect"*

The following highlights about shopping during Thanksgiving Day and Black Friday 2017 are based on a representative sample of 1,016 adults in the U.S., which was conducted on November 25, 2017 by ORC International on behalf of ICSC.

### SECTION A: OVERWHELMING MAJORITY OF SHOPPERS SPENT THE SAME AS OR MORE THAN IN 2016 (p.2)

- Nearly three-quarters (74%) of Thanksgiving Day/Black Friday shoppers indicated spending the same as or more this year than they did in 2016 on goods and services. (Chart 1)
- Roughly 60% of shopper expenditures on goods during the Thanksgiving Day/Black Friday period went to holiday gifts for others, while the remaining 40% was for non-gift merchandise. (Chart 2)
- In addition to goods, Thanksgiving Day/Black Friday shoppers spent on dining (57%), entertainment activities (27%) and personal services (22%).

### SECTION B: PHYSICAL STORES DOMINANT ON THANKSGIVING DAY AND BLACK FRIDAY (p.3)

- Seven of 10 (71%) Thanksgiving Day/Black Friday shoppers purchased merchandise in-store. (Table 1)
- A higher share of shoppers during that two-day period made purchases online from retailers with physical stores (42%) than from pure online retailers (39%). (Table 1)
- Overall, one-quarter (25%) of shoppers purchased items online that they would later pick up in stores—the “click-and-collect” option. (Table 1)

### SECTION C: “CLICK-AND-COLLECT” PROMOTES ADDITIONAL ACTIVITY (p.3)

- Just over one-fifth (21%) of shoppers bought items online from a retailer with a physical presence before Thanksgiving and retrieved the item(s) during the two-day period. The same share (21%) made purchases online on Thanksgiving or Black Friday and actually went to stores on those days to collect their purchases.
- Among shoppers who went to stores to pick up online orders over Thanksgiving/Black Friday, 69% spent additional money at that store/tenant, an adjacent establishment, or another unit within the same shopping center. (Chart 3)
- Once “click-and-collect” shoppers who spent more in store finished shopping, about 41% of all items purchased was from additional items they bought. (Chart 4)
- A significant number (81%) of those who picked up items they ordered online did so at a shopping center. Once, there, many also engaged in other activities including dining (36%) and seeing a movie (21%).

### SECTION D: OMNI-CHANNEL RETAILERS CAPTURE MAJORITY OF EXPENDITURES (p.4)

- Nearly one-third (32%) of shoppers indicated spending more in stores this year than last. About one of five (19%) also said they spent more online from retailers with stores this year. (Chart 5)
- A little over half (52%) of expenditures on goods during Thanksgiving Day/Black Friday took place in physical stores, a percentage that rises to 76% when combined with the share of online spending through retailers with a physical presence (24%). (Table 2)
- “Pure-play” online retailers captured about one-fifth (22%) of total spending on goods during Thanksgiving/Black Friday. (Table 2)

### SECTION E: SHOPPING CENTERS BUSY ON THANKSGIVING DAY AND BLACK FRIDAY (p.5)

- Nearly half (48%) of adults in the U.S. visited shopping centers during the two days. (Chart 6)
- While at those locations, visitors did more than just shop (78%). They also dined at restaurants (46%), saw a movie (21%), contributed to charities (13%), attended holiday-themed events (12%) and had their child’s picture taken with Santa (11%). (Chart 7)

### SECTION F: SHOPPERS HIGHLY EFFICIENT ON THANKSGIVING DAY AND BLACK FRIDAY (p.6)

- In-store conversion rates were higher this year, than last. On Thanksgiving this year, shoppers made purchases in 77.6% of stores visited that day, while on Black Friday they did so in 75.5% of stores visited. When both days are combined, in-store shoppers bought at 76.5% of all stores visited during the two-days. (Chart 8)

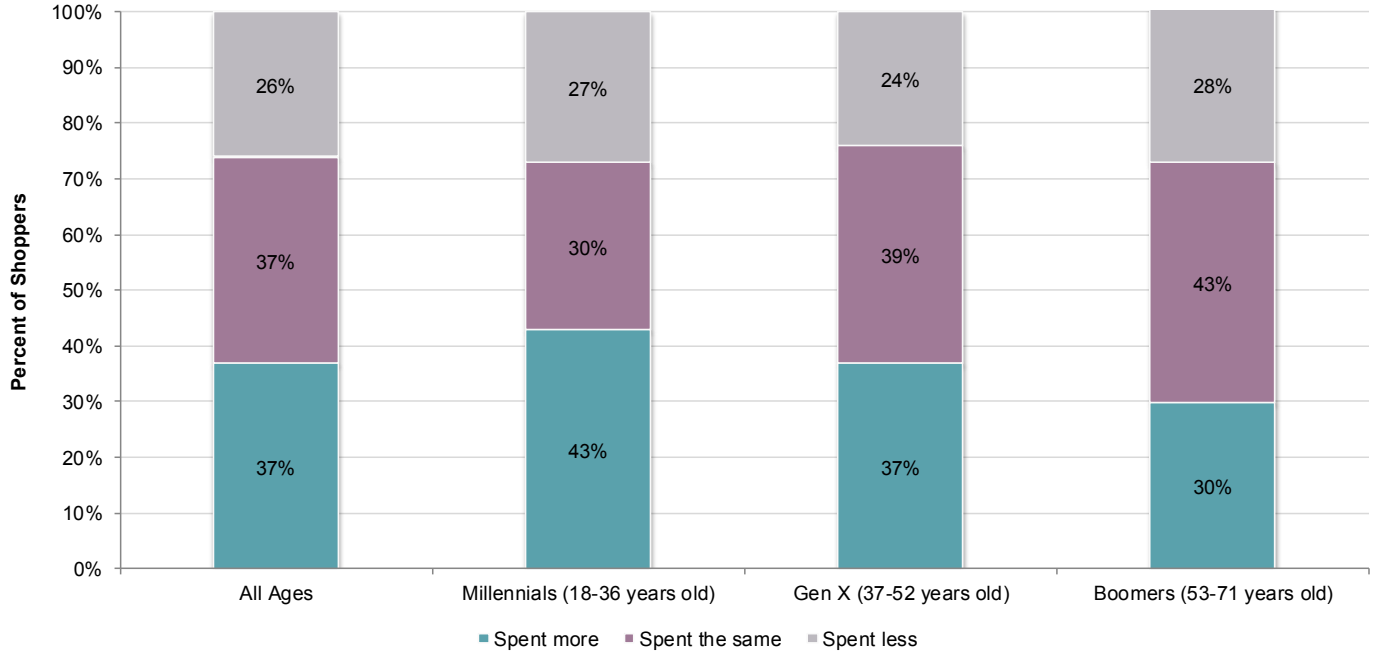
### SECTION G: DECEMBER PROMOTIONS SEEN AS BETTER THAN OR COMPARABLE TO BLACK FRIDAY (p.6)

- Approximately 28% of adults believe that deals will be better in December than they were on Thanksgiving/Black Friday, while 60% believe the promotions will be comparable. (Chart 9)

**SECTION A: OVERWHELMING MAJORITY OF SHOPPERS SPENT THE SAME OR MORE THAN IN 2016**

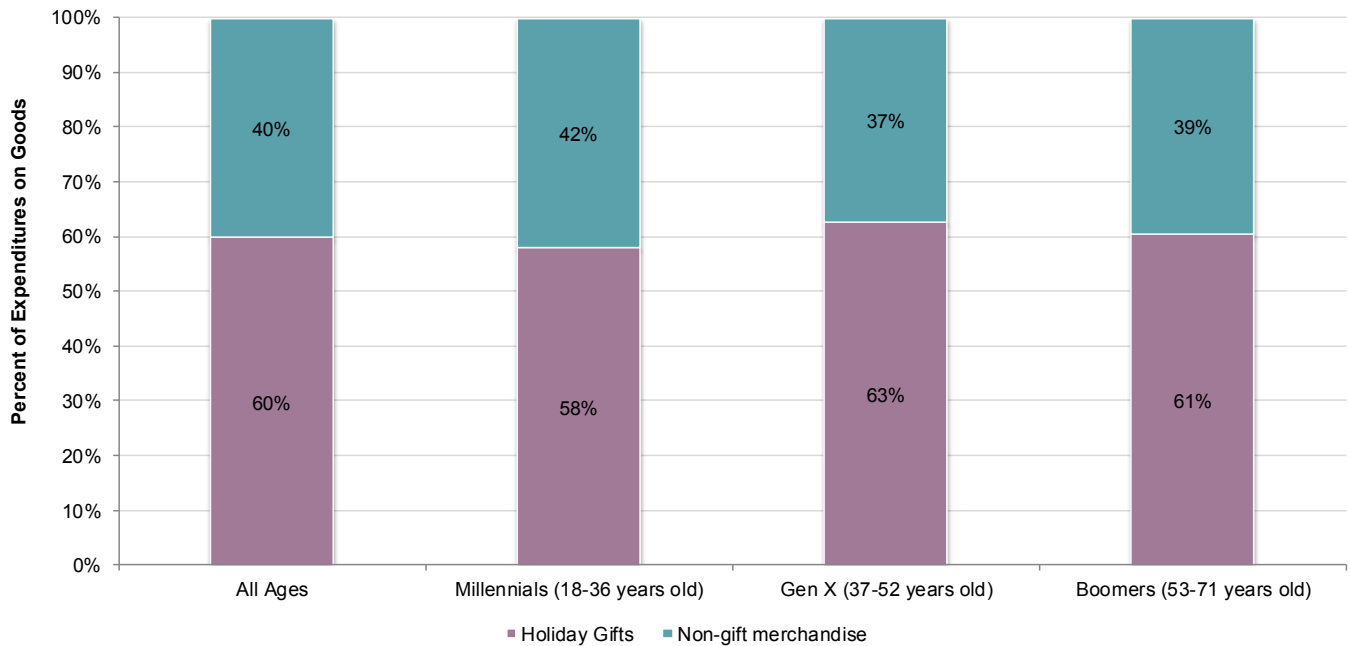
**Chart 1:**

*Only about one-quarter of each generation indicated spending less during Thanksgiving/Black Friday this year. Two-fifths of Millennials said they spent more during Thanksgiving/Black Friday this year than last—a greater share than the older groups...*



**Chart 2:**

*Millennials allocated a slightly higher share of their overall spending on goods during Thanksgiving/Black Friday to non-gift merchandise than older shoppers—confirming a strong desire to take advantage of promotions...*



**SECTION B: PHYSICAL STORES DOMINANT ON THANKSGIVING DAY AND BLACK FRIDAY**

**Table 1:**

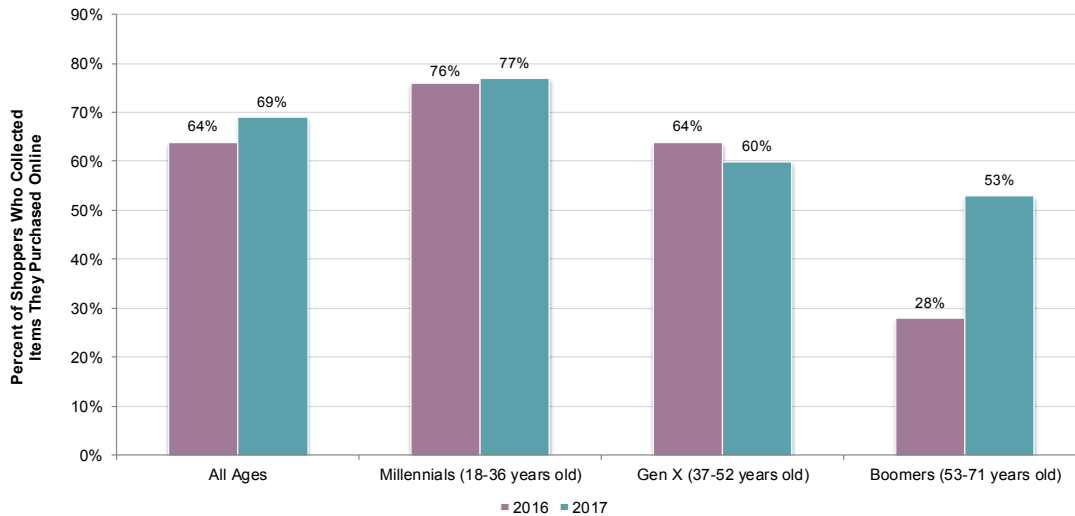
Overall, nearly nine of 10 (87%) shoppers on Thanksgiving/Black Friday made purchases from brick-and-mortar retailers, either in store or online. A greater share of them bought online from retailers with stores (42%) than from pure online retailers...

	All Ages		Millennials (18-36 years old)		Generation X (37-52 years old)		Baby Boomers (53-71 years old)	
<b>Physical Stores / Establishments</b>	87%	71%	90%	76%	89%	76%	79%	56%
<b>Online Retailers with Physical Stores</b>		42%		47%		41%		34%
...Ship to Home		30%		33%		31%		25%
...Pickup in Store		25%		30%		23%		18%
<b>Pure Online Retailers</b>		39%		38%		40%		42%
...Amazon		35%		35%		34%		35%
...All Other Pure Online Retailers		12%		13%		13%		8%
<b>Other Sources (catalogs, phone orders)</b>		9%		12%		7%		4%

**SECTION C: "CLICK-AND-COLLECT" PROMOTES ADDITIONAL ACTIVITY**

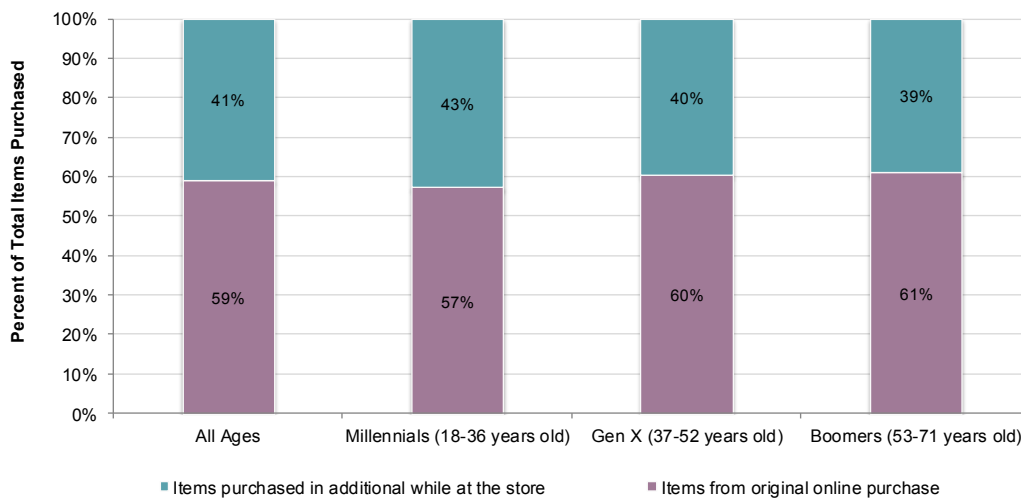
**Chart 3:**

The share of "click-and-collect" shoppers buying additional items once in store increased this year. The percentage of Baby Boomers doing this increased significantly to over half (53%) of them...



**Chart 4:**

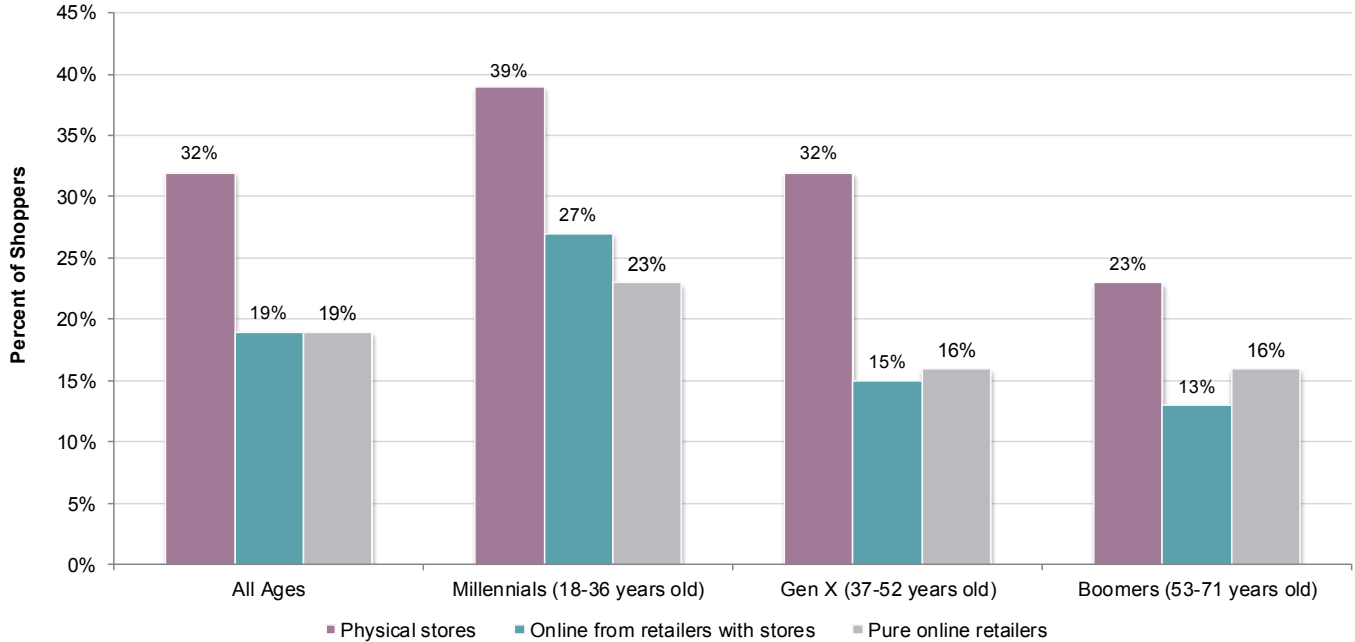
Two-fifths of all items shoppers who bought more once in stores were purchased in addition to their original online order...



**SECTION D: OMNI-CHANNEL RETAILERS CAPTURE MAJORITY OF EXPENDITURES**

**Chart 5:**

*A higher share of shoppers in all generations increased their spending in stores this year, while fewer spent more either online from retailers with physical locations or from pure online retailers...*



**Table 2:**

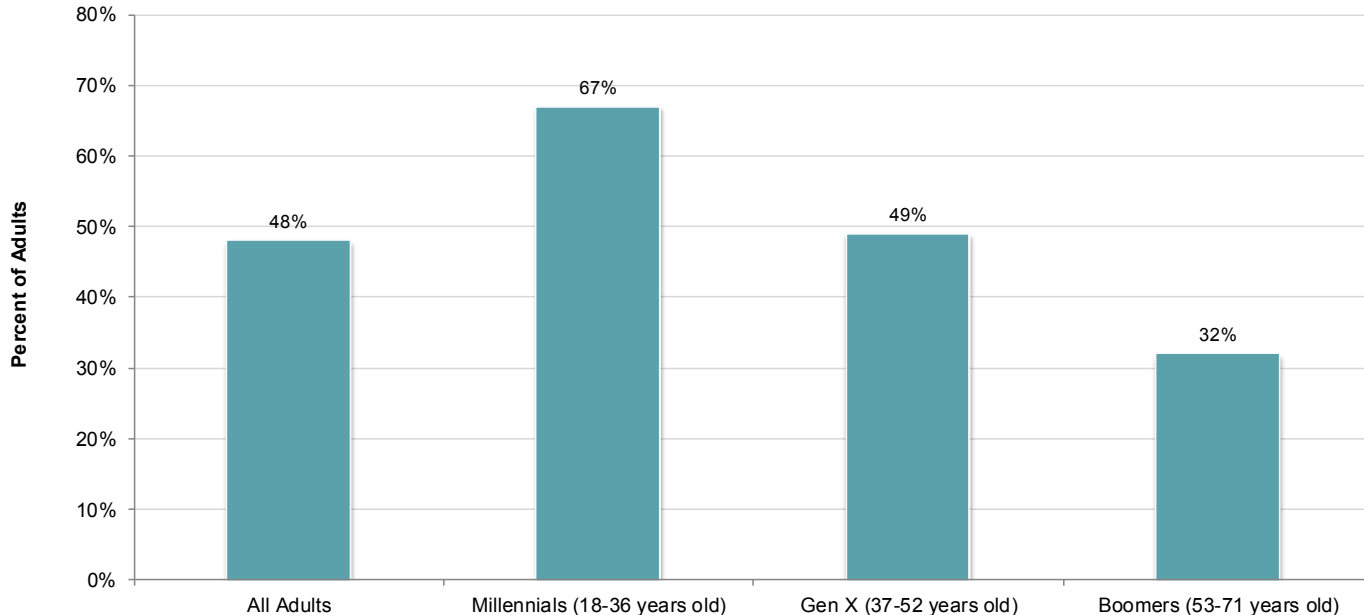
*Overall, retailers with stores captured more than three-quarters of total spending on goods during Thanksgiving/Black Friday. Shoppers allocated nearly one-fourth of spending to brick-and-mortar retailers' websites and a little more than one out of every five dollars went to pure-play online retailers...*

	All Ages		Millennials (18-36 years old)		Generation X (37-52 years old)		Baby Boomers (53-71 years old)	
<b>Physical Stores / Establishments</b>	<b>76.0%</b>	<b>52.0%</b>	<b>77.9%</b>	<b>55.1%</b>	<b>77.0%</b>	<b>52.1%</b>	<b>70.6%</b>	<b>44.3%</b>
<b>Online Retailers with Physical Stores</b>		<b>24.1%</b>		<b>22.8%</b>		<b>24.9%</b>		<b>26.2%</b>
...Ship to Home		16.1%		14.0%		16.5%		20.0%
...Pickup in Store		7.9%		8.8%		8.5%		6.2%
<b>Pure Online Retailers</b>		<b>22.2%</b>		<b>19.3%</b>		<b>22.1%</b>		<b>28.3%</b>
...Amazon		18.5%		15.3%		18.3%		25.2%
...All Other Pure Online Retailers		3.6%		4.0%		3.8%		3.1%
<b>Other Sources (catalogs, phone orders)</b>		<b>1.8%</b>		<b>2.8%</b>		<b>0.9%</b>		<b>1.1%</b>
<b>Total</b>		<b>100%</b>		<b>100%</b>		<b>100%</b>		<b>100%</b>

**SECTION E: SHOPPING CENTERS BUSY ON THANKSGIVING DAY AND BLACK FRIDAY**

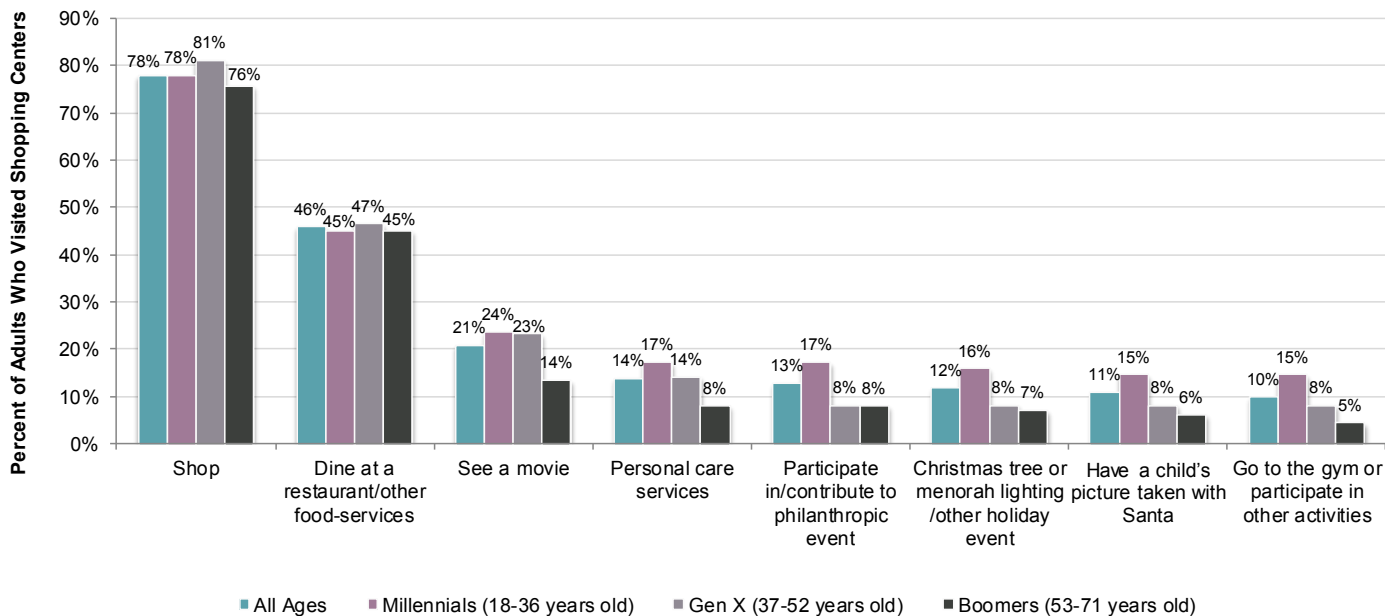
**Chart 6:**

More than two-thirds (67%) of millennials visited shopping centers during the Thanksgiving/Black Friday period. Roughly half (49%) of Gen Xers and about one-third (32%) of Boomers did the same ...



**Chart 7:**

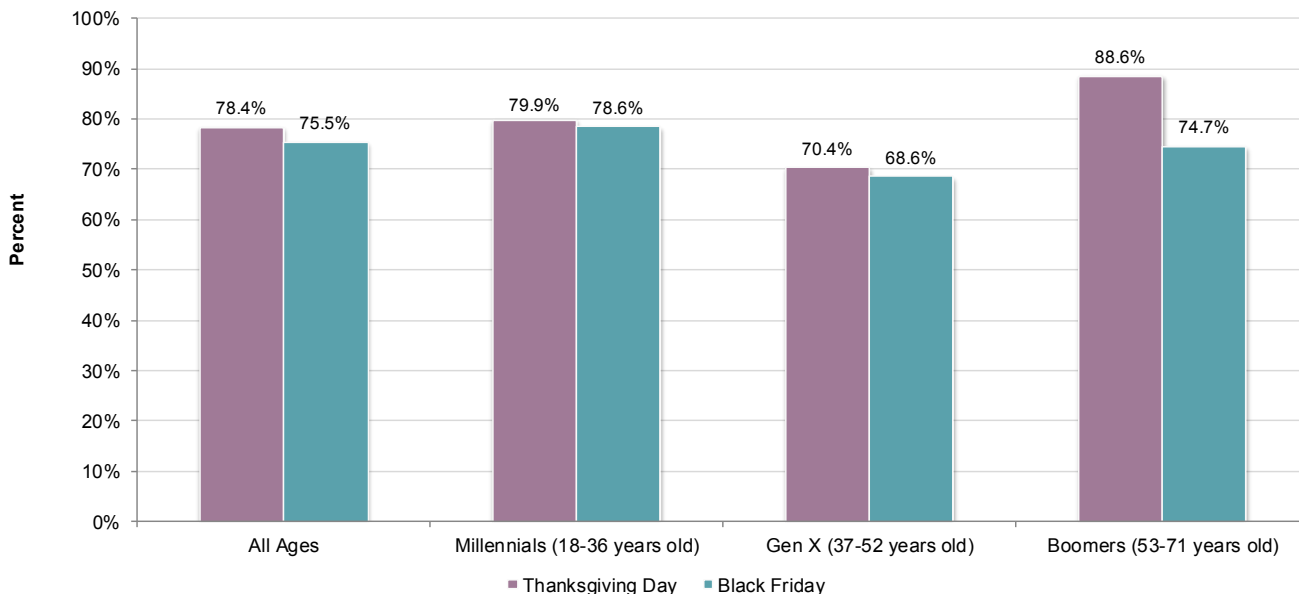
While shopping was the number-one activity at shopping centers during Thanksgiving/Black Friday, many shoppers also enjoyed experiential events such as dining, seeing movies and contributing to charities ...



**SECTION F: SHOPPERS HIGHLY EFFICIENT ON THANKSGIVING DAY AND BLACK FRIDAY**

**Chart 8:**

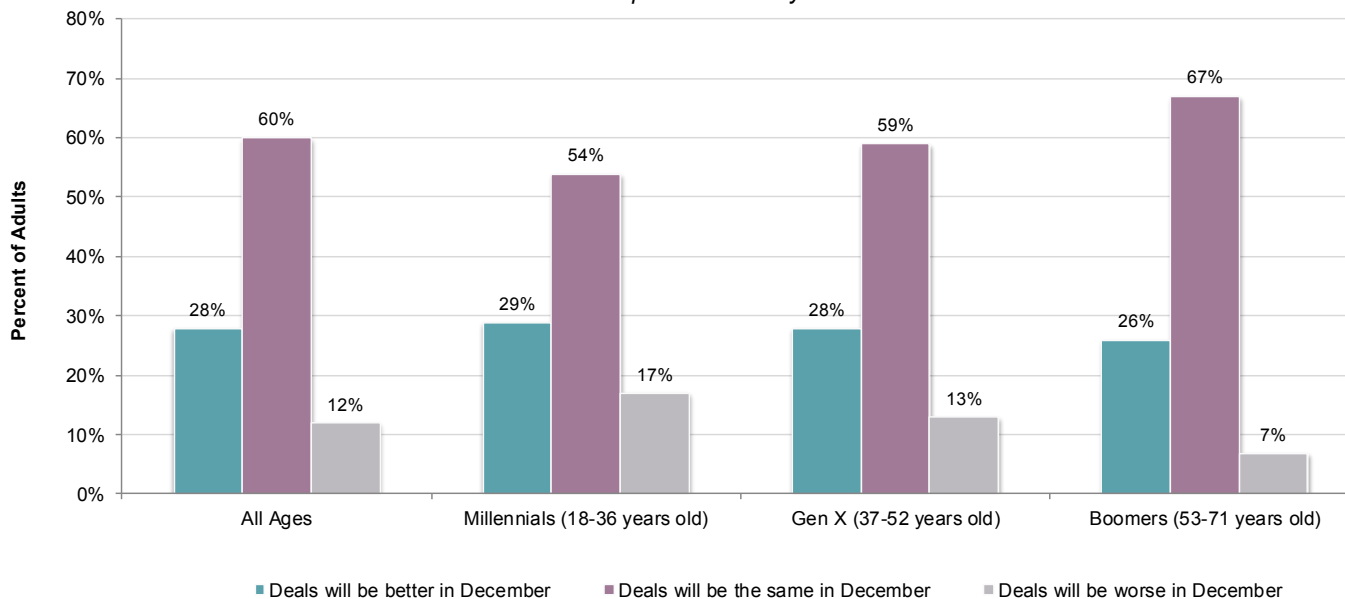
*The oldest shoppers on Thanksgiving were extremely efficient, making purchases at nearly 90% of the stores they visited. On Black Friday, the youngest shoppers made purchases at nearly 80% of the stores they visited...*



**SECTION G: DECEMBER PROMOTIONS SEEN AS BETTER THAN OR COMPARABLE TO BLACK FRIDAY**

**Chart 9:**

*Nearly 90% of adults believe December promotions will be better than or the same as those found during Thanksgiving Day/Black Friday. Higher shares of millennials and Gen Xers believe deals will be worse in December compared with Baby Boomers ...*



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