The New Digital Divide

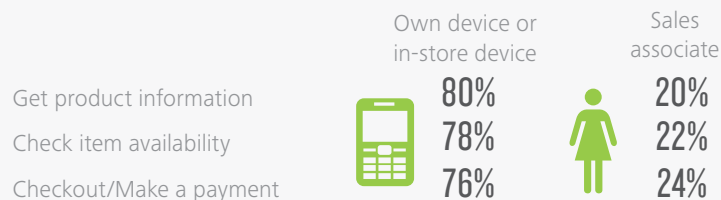Retailers, shoppers, and the digital influence factor

To help retailers understand the evolving impact of digital, Deloitte surveyed over 2,000 U.S. consumers in late 2013 asking them questions about how they use digital devices during their shopping journey. The focus of our research moves beyond "if" digital is having an influence to quantify "how" it is changing behavior along the path to purchase. The results are staggering and suggest retail is at a tipping point; no longer can the industry afford to view digital as a separate business function, but rather integral to the entire enterprise.
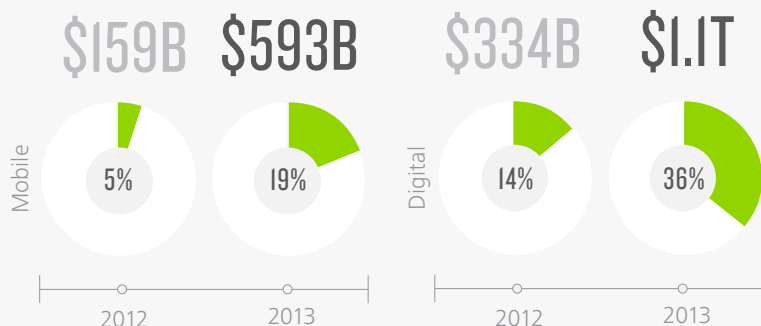
Over 1 trillion

$1,100,000,000,000

in retail sales today are influenced by digital, and digital is projected to influence 50% of all retail sales by the end of 2014
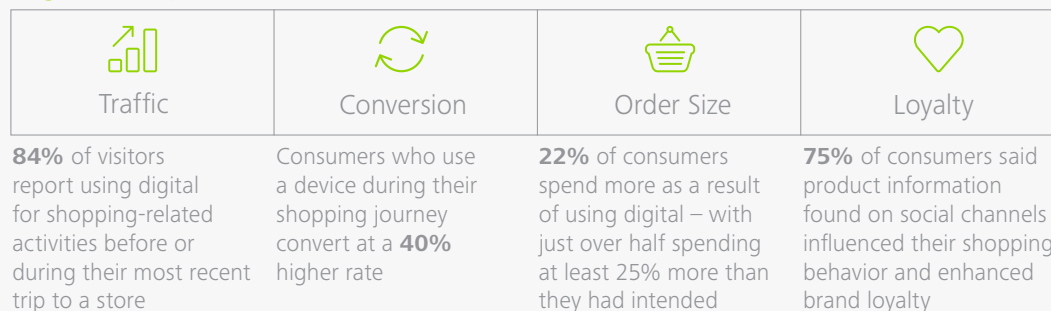
Where digital shoppers go for help

	Own device or in-store device	Sales associate
Get product information	80%	20%
Check item availability	78%	22%
Checkout/Make a payment	76%	24%

Mobile's and digital's influence on in-store sales

Mobile

$159B — 5% (2012)
$593B — 19% (2013)

Digital

$334B — 14% (2012)
$1.1T — 36% (2013)

Digital's impact areas

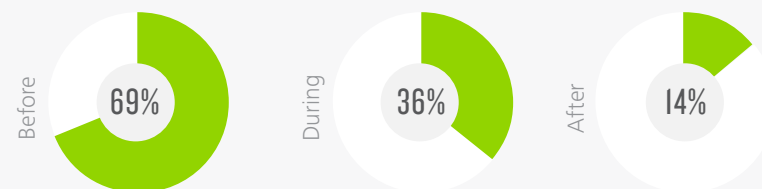| Traffic	Conversion	Order Size	Loyalty
84% of visitors report using digital for shopping-related activities before or during their most recent trip to a store	Consumers who use a device during their shopping journey convert at a **40%** higher rate	**22%** of consumers spend more as a result of using digital – with just over half spending at least 25% more than they had intended	**75%** of consumers said product information found on social channels influenced their shopping behavior and enhanced brand loyalty

Role of digital during the shopping journey

Percent of shoppers that use digital devices throughout their shopping experience:

Before — 69%
During — 36%
After — 14%

Retail categories most and least influenced by digital

MOST INFLUENCED

1 Electronics
2 Furniture
3 Sporting

LEAST INFLUENCED

8 Convenience Store
9 Grocery
10 General Merchandise