RETAIL'S ROCKY ROAD TO THE HOLIDAYS

The DynamicAction Retail Index: Fall 2016

An analysis of more than \$8.7 Billion in consumer transactions. Those transactions account for \$5.6 Billion in North America and \$3.1 Billion in Europe.

Here is the current state of retail

PROMOTIONS

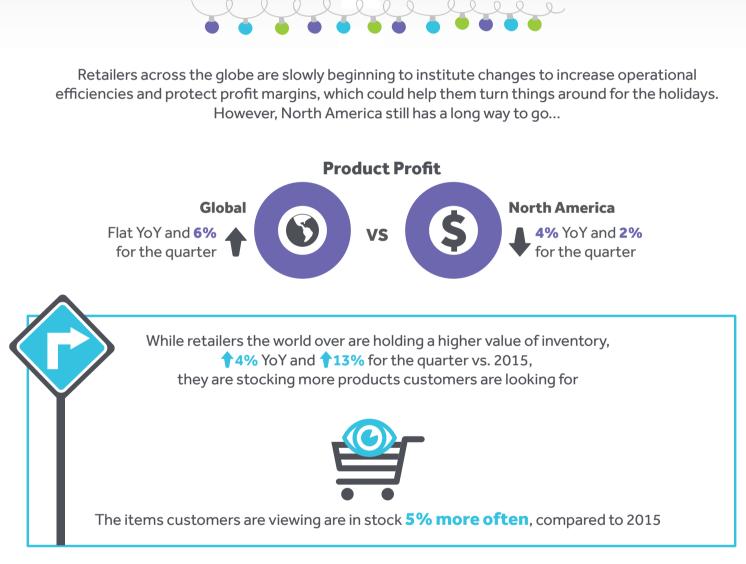
Globally retailers are continuing to pull their promotional lever more than ever in the lead up to the holidays, with **orders using promotions up 85% YoY**



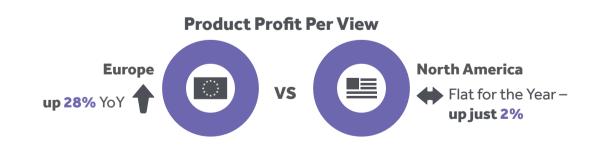
First-time buyers converting to repeat purchasers are ↓ 7% YoY and ↓ 12% for the quarter worldwide New customer orders are ↓ 9% YoY and ↓ 11% for the quarter around the globe

With the rise of global bargain hunters, who have become accustomed to BOGO and free-with-purchase offers throughout the year, customer loyalty is waning. Retailers are finding it increasingly more difficult to attract, acquire and retain customers.

But there may be some *twinkling* lights at the end of that dark tunnel



Globally retailers are also increasing the profitability of each customer visit and click, with product profit per view $\uparrow 17\%$ YoY and $\uparrow 3\%$ for the quarter compared to 2015



FREE SHIPPING 🖊

Retailers worldwide are relying less on free shipping to close the deal



Free shipping is flat for the year, but **12%** for the quarter (vs. 2015), and express shipping is **41%** for the year and **53%** for the quarter (vs. 2015)

The study benchmarks retail trends in key categories from January 1st - September 1st, 2016 in comparison to 2015. Any references to quarterly numbers refers to June 1st - August 29th, 2016 in comparison to 2015.



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