

# 2019 Holiday Season Recap: 2019? Meet 2013.

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Something remarkable happened between Thanksgiving 2019 and New Year's Day 2020. We repeated history with an amazing degree of consistency. I've been creating write ups on in-store shopping patterns since I began working at ShopperTrak nearly 5 years ago, and while I've always demonstrated how each season follows the pattern of the last year where Thanksgiving Day and Christmas Day align, the match between 2019 and 2013 is the closest yet. ***And this match is the very reason why you shouldn't worry about down holiday season traffic results.*** Let's walk through each season's results.

## The set-up: reviewing the holiday calendar

When we looked at how the holiday calendar was shaping up prior to the start of the season, we noted a couple of important differences between 2019 and last year in 2018:

- **Thanksgiving Day (and therefore Black Friday) came a week later.** This meant that the number of days in ***the holiday calendar would be compressed*** from 42 last year (11/18/2018) to 35 this year (11/24/2019 – 12/28/2019).
- **There were only 3 December Saturdays before Christmas** (12/7, 12/14, 12/21), while there were 4 in 2018 (12/1, 12/8, 12/15, 12/22). Since weekends are typically busier than weekdays, 2019 lost one ***intense shopping day***.

Note that we can't match up Saturday, November 30, 2019 with Saturday, December 1, 2018 because the 30<sup>th</sup> is part of Black Friday Weekend and is therefore unique in it's level of traffic intensity.

Losing a week, plus a strong Saturday, makes the 2019 calendar completely out of balance with 2018 and therefore the comparison between the two years won't be very compelling.

## Year-Over-Year Results

In fact, if you look only at December 2019 (12/1/2019 – 12/28/2019) compared to December 2018 (12/2/2018 – 12/29/2018), the numbers look bleak for this year. December would have been down -6.1%. Doesn't sound good with only this one data point. And trying to parse out the full season vs. last year becomes problematic because of the additional week.

To even things out, lets compare all of November through December (11/3/2019 – 12/28/2019) to the same period last year (11/4/2018 – 12/29/2018). The full 8 weeks are down -6.1%, which means that the lead-in to the season is the same as December.

**BUT.** What happened in our corollary year, 2013 vs. 2012? ***The same thing.*** December 2013 was down -6.6% vs. 2012. Slightly worse than what we experienced this year. And the full November/December period was down -5.4.%. Slightly better than this year. Let's look at a few other dates for further comparison:

<u>Period</u>	<u>2019 vs. 2018 Comp %</u>	<u>2013 vs. 2012 Comp %</u>
December 1 – 24	-7.7%	-9.1%
December 18 – 24 (Christmas Week)	-3.1%	-2.7%
December 21 (Super Saturday)	-9.7%	-9.2%

Being down 9% on the second biggest in-store traffic day of the season would be troublesome except that the calendars didn't line up. That's why brick-and-mortar retail didn't fold in 2013 and it won't succumb to the so-called retail apocalypse this year! [Initial reports](#) indicate that total retail sales were up 3.4% this year. How did retail sales do in 2013? The [same report](#) from 2013 showed total retail sales being up 2.3%. If the traffic/sales gap from 2013 was about the same as this year's gap, then the key takeaway should be the same: it's all about the calendar and not a new, concerning trend.

### What's next?

In fact, let's look ahead to the next holiday season. Should we expect another big drop on days like Super Saturday or over the full season? Let's look at some history.

- In 2014, seasonal traffic comps rebounded from the 2013 drop-off to -2.5%, which was respectable as online shopping started to grow.
- For 2020, we have shifted the calendar a year due to leap year so that the 2020 holiday season matches up with 2015. What's the difference between 2014 and 2015? Christmas Day was on a Friday in 2015 and on a Thursday in 2014. Probably not enough to change the shopping pattern for the season.
- Looking at the two weeks from Christmas Week into the New Year (12/22/2019 – 1/4/2020 compared to 12/23/2018 – 1/5/2019), traffic is now UP 3.4%. Back in 2013, it was up 1.0%.

Sifting through the data, we may yet experience a traffic bounce-back in the 2020 holiday period similar to 2014.

