

9 Truths

you didn't know about **Christmas**



May '16

What we will cover today?



The background of the slide is a halftone pattern consisting of a grid of small dots. The dots are primarily black and white, but there are clusters of colored dots in shades of blue, yellow, and red, creating a textured, pixelated effect. A large, solid yellow circle is positioned on the right side of the slide, partially overlapping the halftone pattern.

About the Research

About the Study

ACRS POPAI Christmas Omnibus

Aim

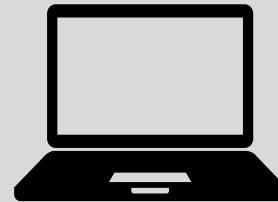
- To better understand shopper behaviour around this key trading period. We chose 6 omnibus questions that required respondents to reflect on their recent Christmas shopping.

Base Size

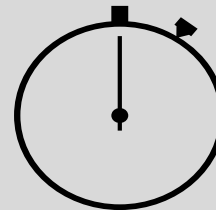
- N=473 completes

Dates in field

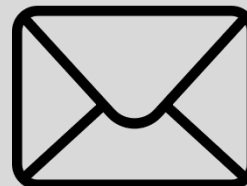
- 16 - 19 Feb 2016



Conducted online



5 minute survey



Completed by nationally representative sample



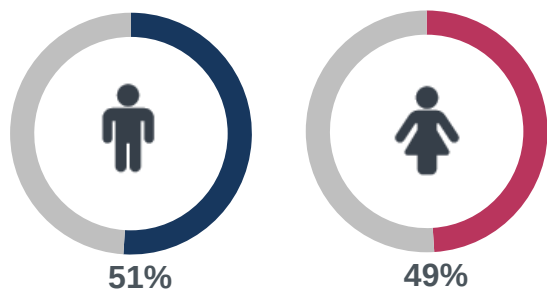
**Who did we
speak to?**



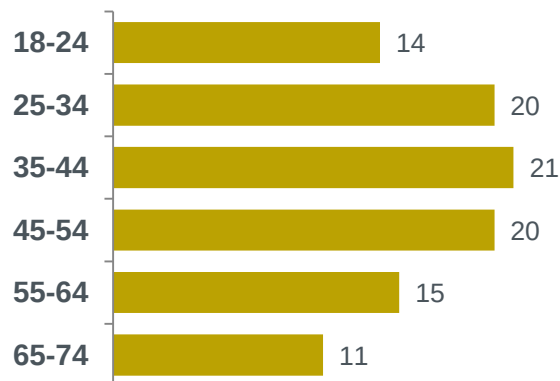
Who did we speak to?

We spoke to n=473 respondents, of which...

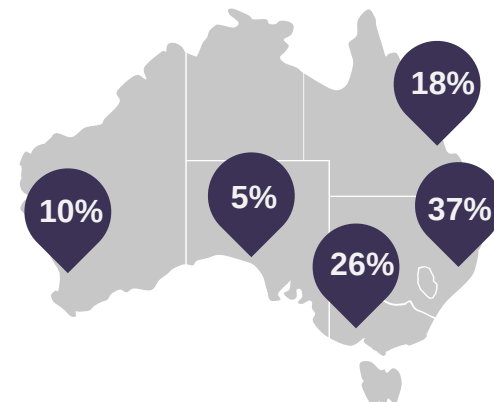
Gender



Age



State





What we asked Shoppers?

We spoke to n=473 adult Australians from 16th to 19th of February

of which...



01

- Thinking back to your gift shopping for Christmas 2015, where did you spend the most of your money? Please mention up to five stores

02

- On a scale of 1 to 3, where 1 is a fantastic experience, 2 is an 'OK' experience (neither fantastic, nor terrible experience), and 3 is a terrible experience, how would you rate your experience of shopping at these stores for Christmas gifts?



03

- For each of the stores you mentioned in question 1, how did you shop at these stores?
- Physical Stores, Online or Both

04

- Thinking about your shopping at ....., how would you best describe how you were feeling when shopping at this store?
- Stressed, Relaxed, Excited, Confused, Inspired, Irritated, Festive



05

- Why did you end up shopping at ____?
- Easy to get, Cheaper than anywhere else, broad range that suits my needs, good loyalty program, good specials and promotions, pleasant shopping experience, brands they sell, etc

06

- Which of the following statements apply to your Christmas shopping?
- Plan and buy in advance, buy during the year, Last Minute, Know what gifts to buy before start shopping, seek inspiration while browsing and then make a decision



**The 9 truths
about
Christmas**



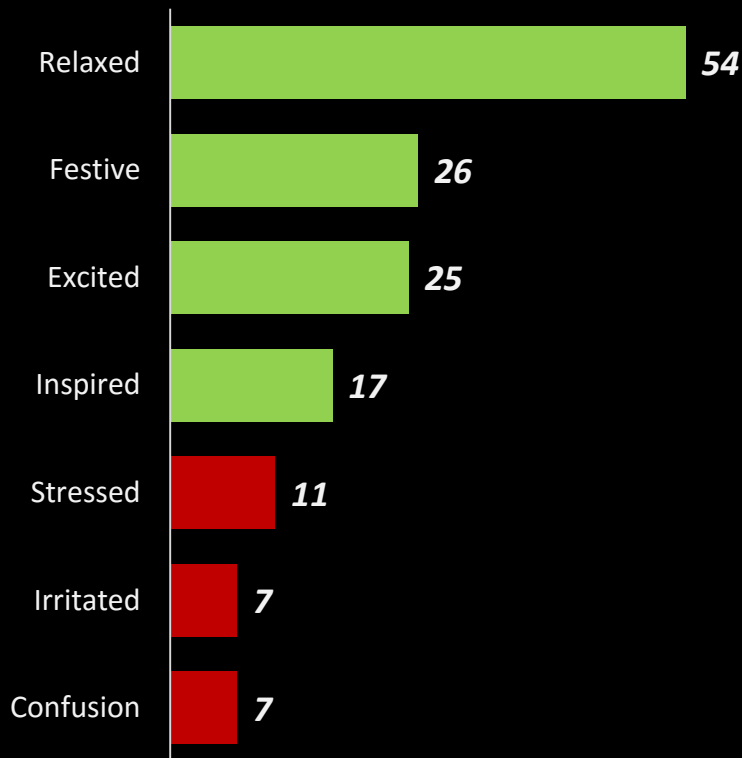
1 Shoppers are shopping across a broad repertoire of stores for Christmas

A wide variety of retailers were visited over the Christmas period, with a combination of bricks & mortar stores and online.



#2 People actually enjoy Christmas Shopping!

Most shoppers have a positive feeling about Christmas shopping. Some channels must, however, deal with higher levels of Stress (Grocery) and Irritation (Department Stores)



Disc. Department Store

Compared to other channels, Discount Department Stores have the highest score on positive attributes such as Relaxed (56%) and Festive (32%)



Department Store

Department Stores have the highest scores on **Excitement** (29%), but also higher levels of **Irritation** (9%)

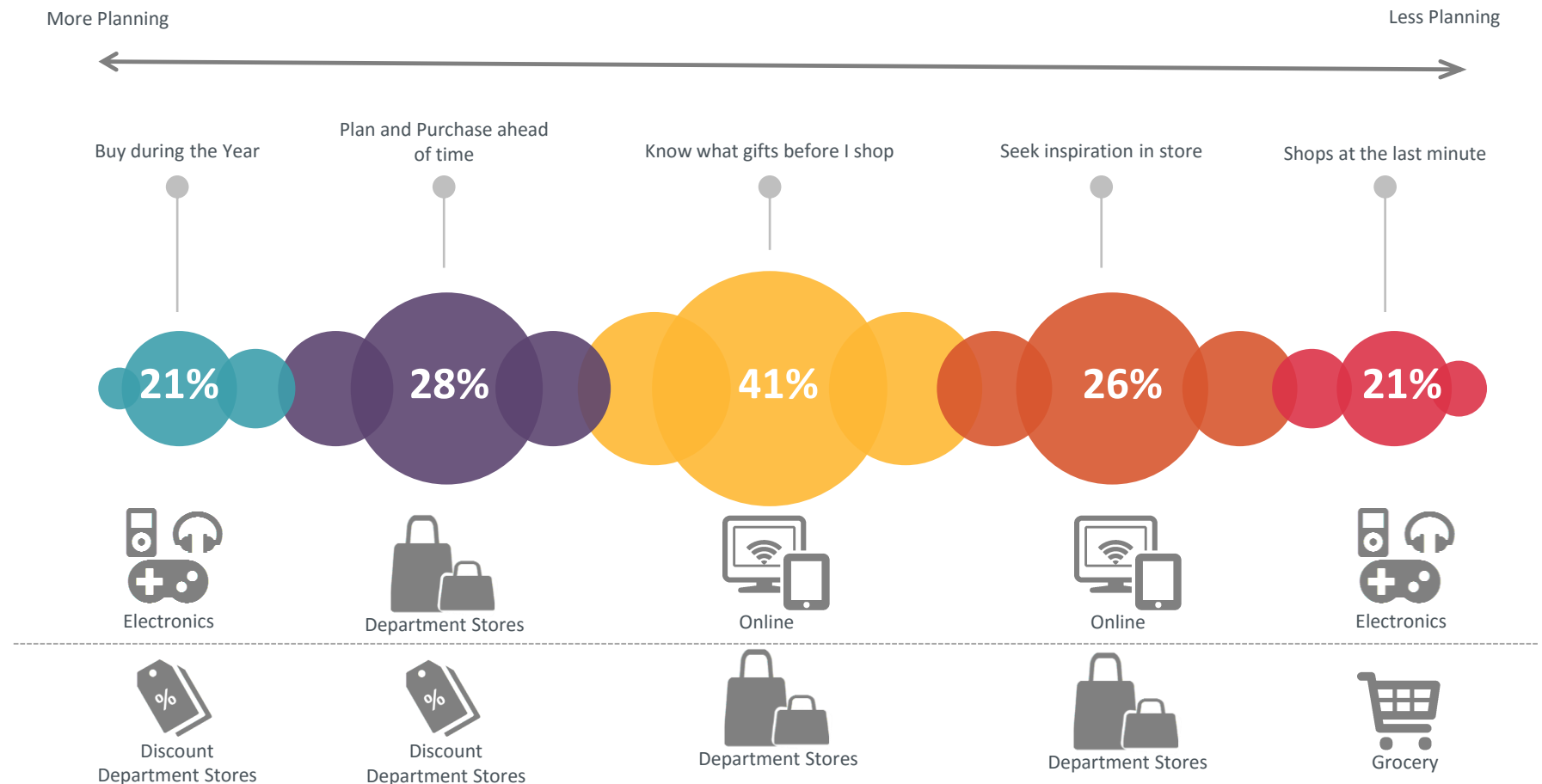


Grocery

Grocery shopping is considered the most **stressful** across all channels around Christmas (15%)

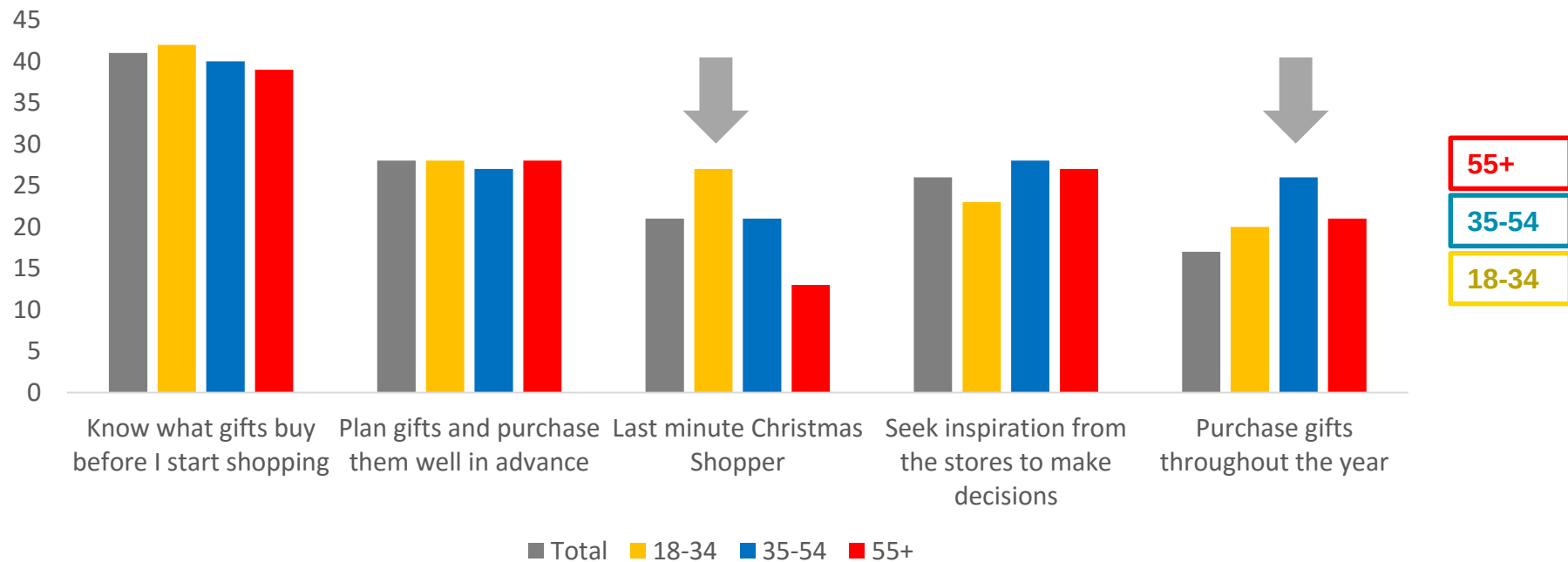
#3 Impacting your shopper before Christmas is crucial - especially for DDS

But there is still room to influence shoppers at the last minute. Grocery and Electronics shopping are the least planned and therefore there is more opportunity to convert in store



#4 Unplanned shoppers are more likely to be younger

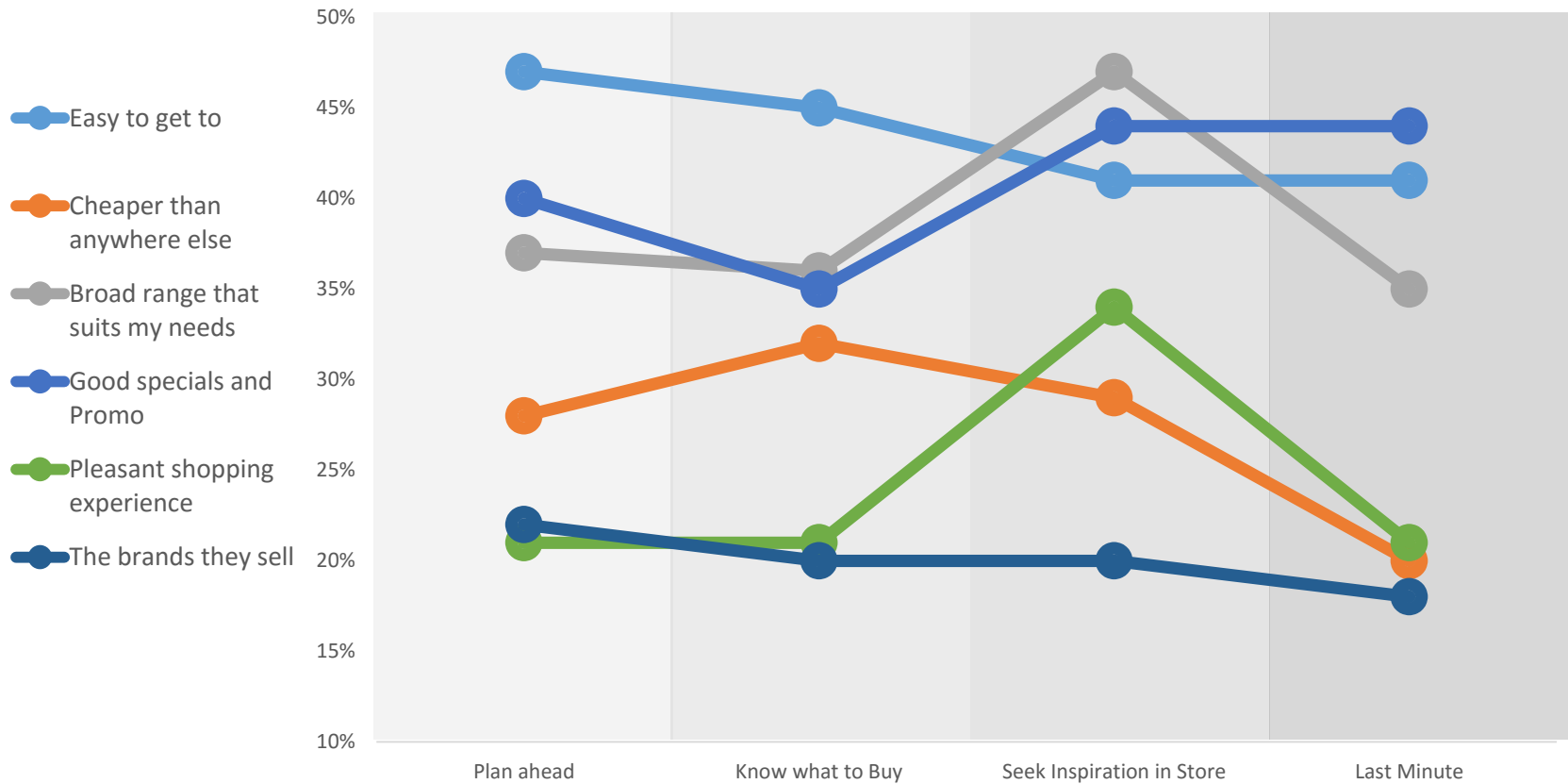
Regardless of age, most shoppers have undertaken some level of planning before they hit the stores at Christmas. There are more younger shoppers, and fewer 55+ shoppers, leaving Christmas gift shopping to the last minute. Middle-aged shoppers are more likely to purchase gifts throughout the year.



#5 The less planned the shopping, the less important is price

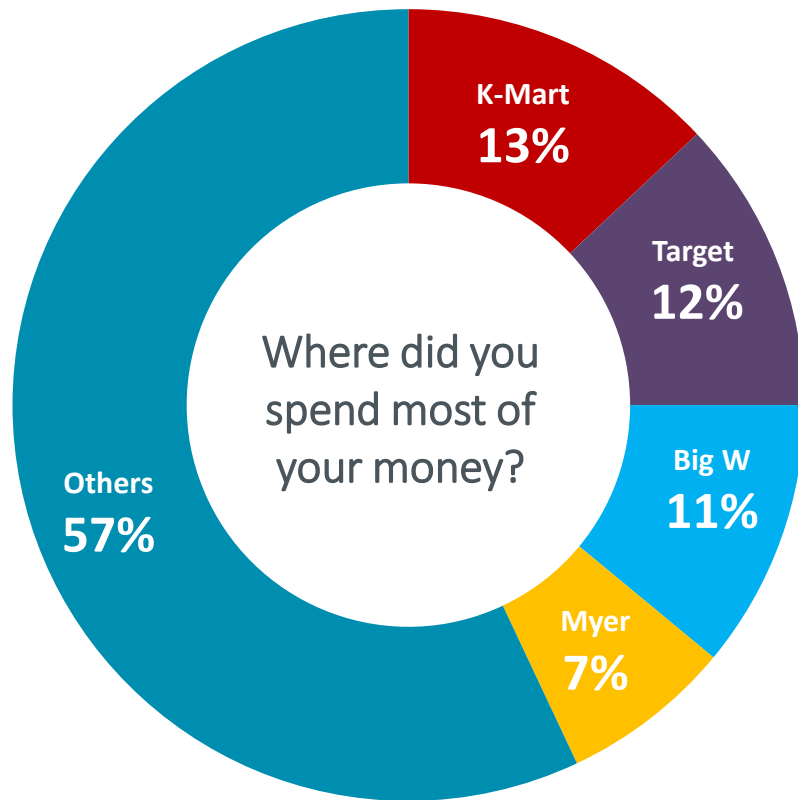
Although Promotions and Specials are still important to capture shoppers attention.

Influences on Christmas shopping (% of Shoppers)



#6 K-Mart, Target, Big W and Myer captured a great part of Shoppers' wallet

What have they done right?



Cheaper than anywhere else

59% of K-mart shoppers believe the banner is the cheapest among all options, more than double of market's average (27%)



Good Specials and Easy to Get to

64% of shoppers believe Target has good specials (38% Market). Moreover, has the highest scores on "easy to get" among DDS (52% x 41%)



A mix of range of products and good prices

Not the highest on any attributes, but over index as "Broad Range that Suits my needs" and "Cheaper than anywhere else"

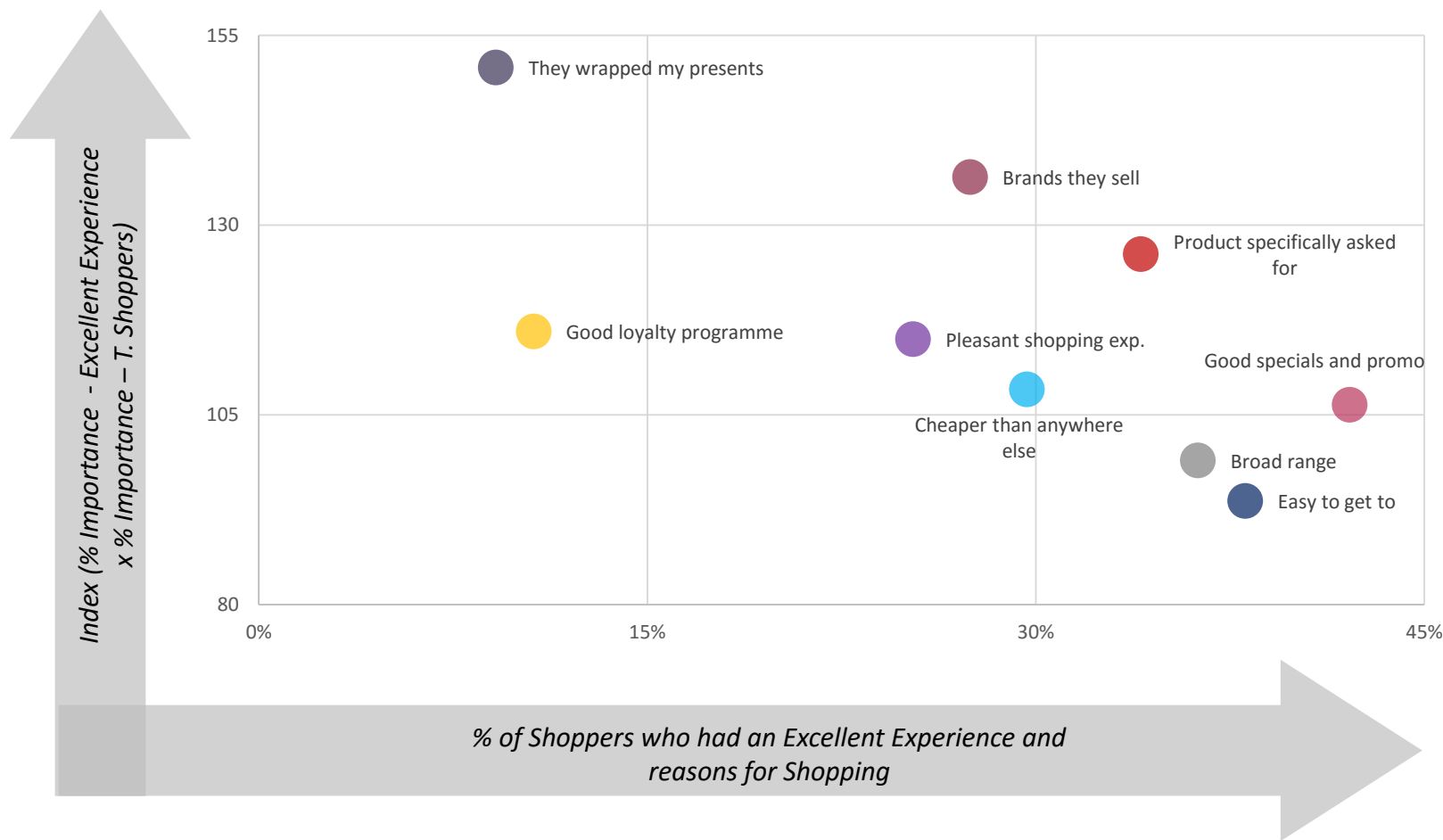


Brands and Loyalty Program

Myer has the highest scores on Specific Products/Brands they sell, despite over indexing on Loyalty Programs

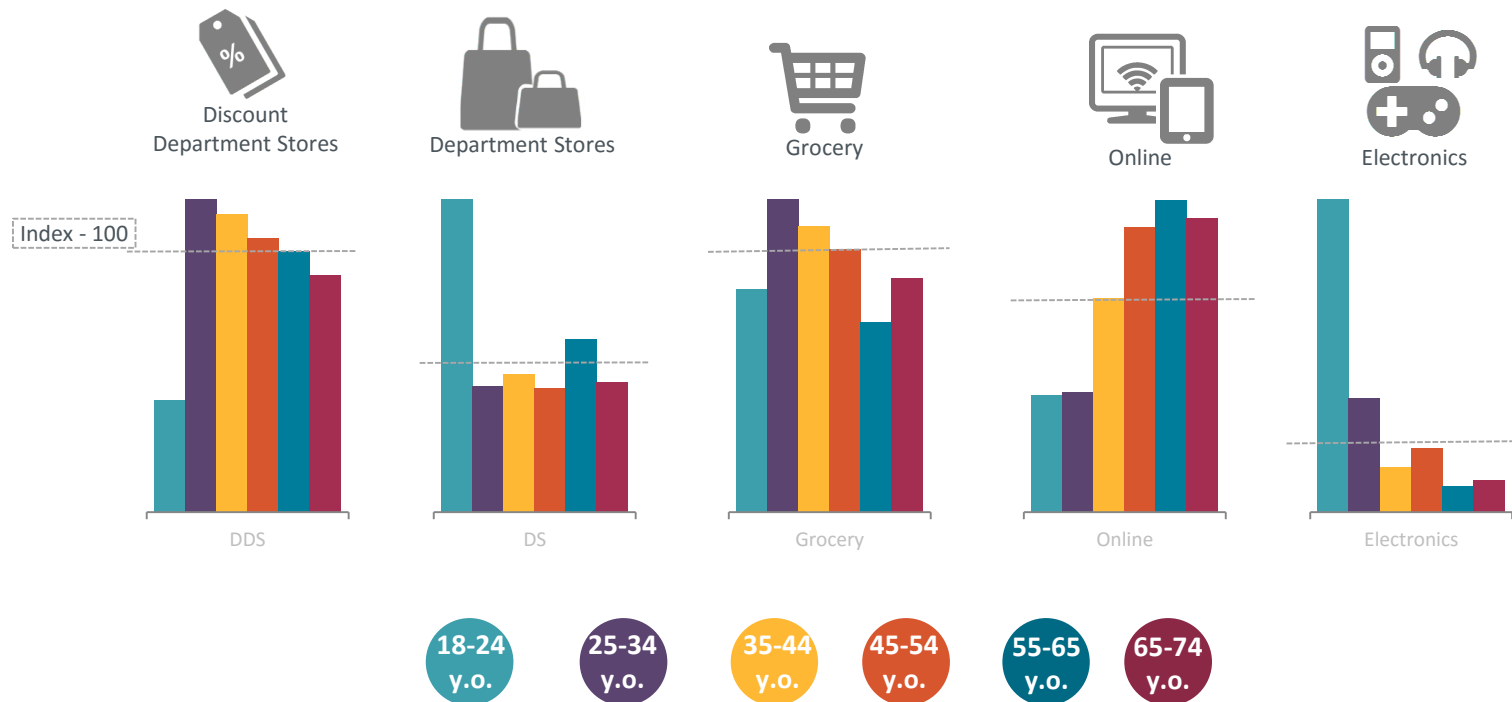
#7 Good Specials/Promotions and Wrapping Presents were key for shoppers who had Excellent Experiences

Although only 9% of shoppers who had a great shopping experience this Christmas mentioned “They wrapped my presents” as the reason for buying, it has the highest index (151) in comparison with total average



#8 Online shopping is not necessarily about young folks. Not at Christmas

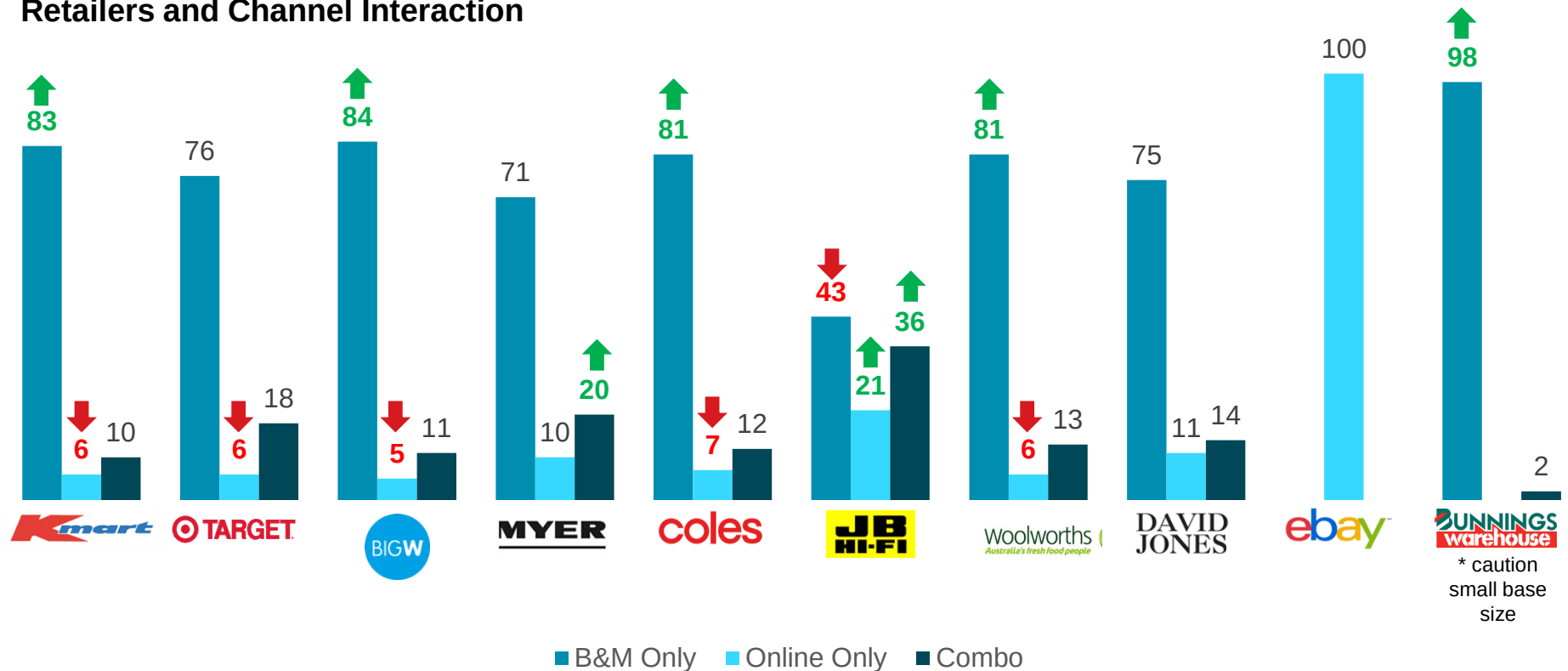
Electronics retailers were most popular with younger Australians; 25-34 year olds over-indexed on DDS and Grocery channels. Online was used more by older shoppers.



#9 The integration of Online and Bricks & Mortar is a reality for only a few retailers at Christmas

Overall, 73% of shoppers are doing their Christmas shopping exclusively in bricks and mortar environments. Only 14% are shopping online exclusively, while 13% are using a combination of physical and online shopping environments

Retailers and Channel Interaction



Key things to consider when planning for Christmas

1

Shopper Repertoire

Shoppers don't do all the shopping in a single store. Make sure your brand has pride of place across key banners

2

People like Christmas Shopping!

Make sure to bring the celebratory mood to your communication and in-store. Reduce angst for shoppers where possible

3

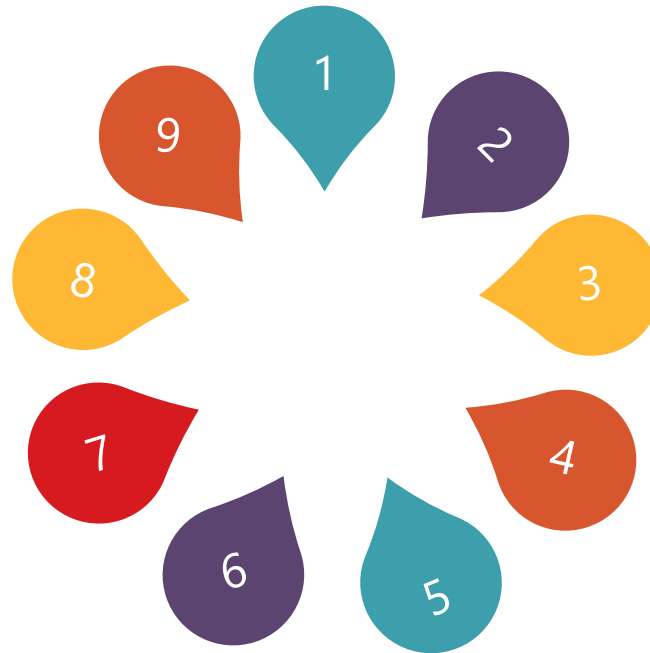
Be clear on when to impact your shopper

Some shoppers are more planned than others, specially for DDS. Make sure you impact them in a manner which is relevant to their mission and needs

4

How old is your shopper?

There is significant levels of planning across all ages, although unplanned shoppers are more likely to be younger



9

Omni Channel or Not?

The combination of Online and Bricks & Mortar is a reality for only a few retailers at Christmas. For others, the physical experience is key

5

The less planned your shopper, the less important is price

As Christmas draws nearer, migrate your focus from price only to value-add Specials and Promotions

6

K-Mart, Target, Big W and Myer

Where shoppers spend most of their money at Christmas

7

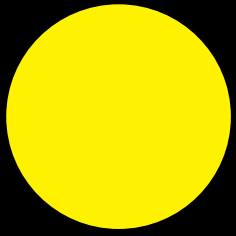
What Excellent Experience looks like?

Specials and Promotions" are popular among shoppers who had a great experience. Although, "Wrapping Presents" can be a powerful tool for differentiation

8

Younger shoppers are less likely to buy online for Christmas

The level of planning associated with Christmas shopping makes it less appealing for young shoppers



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Thank You