

# CHRISTMAS TRENDS 2015

# UK



**webloyalty**



**This research has been commissioned by Webloyalty to provide retailers with insight into the Christmas and holiday trading period.**

### **About Webloyalty**

Webloyalty is a leading reward programme provider working with major online retailers to help them build stronger, more profitable relationships with their customers. Through our membership programmes we help our online retail partners' customers save hundreds of pounds a year while providing the partner with an additional revenue stream. As well as incentivising customers to make repeat purchases at the partner's site, members can also earn cashback and get great deals on everything from fashion to electronics to travel, at hundreds of top online stores.

Webloyalty was established in the UK in 2007 and has since expanded into France, Spain, Ireland, Brazil, Turkey, Netherlands, Australia and Belgium.

### **About Conlumino**

Conlumino is a retail research agency and consulting firm. Our work focuses on all aspects of retailing and consumer behaviour, which we deliver through bespoke reports, projects and presentations. We work with many of the world's leading retailers, property firms and those in the financial sector to help them maximise success through developing a thorough understanding of the sector and its likely future performance.

#### **Webloyalty**

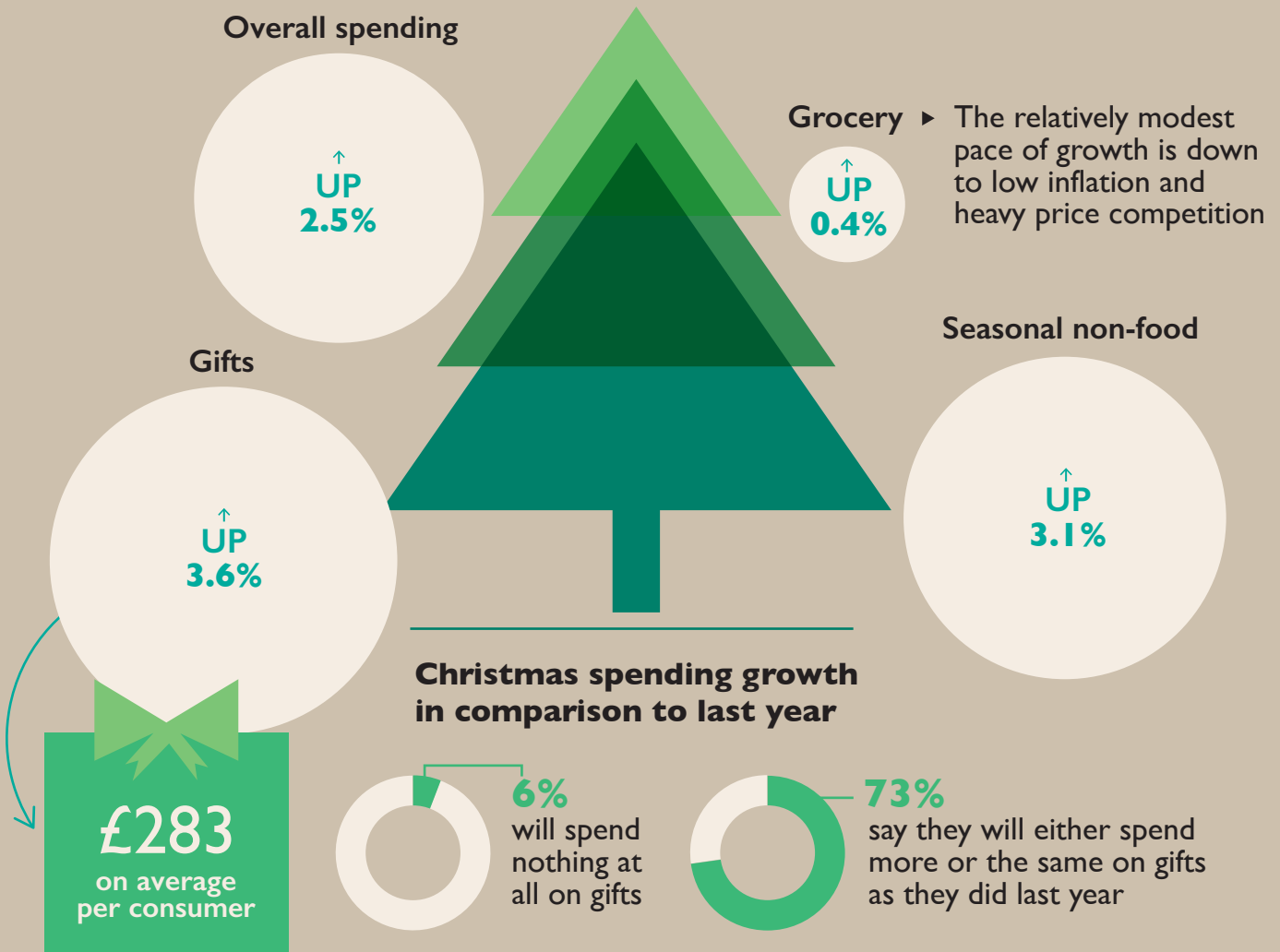
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# CHRISTMAS SPENDING

## CHRISTMAS SPENDING GROWTH IN COMPARISON TO LAST YEAR



### OVERALL BUDGET

On average per consumer

**£442**

including



Gifts



Food



Groceries

### TIME SHOPPING

Spend on average per consumer

Last year



9hs

This year



10hs

### ONLINE VS OFFLINE

Grocery shopping is still done in store

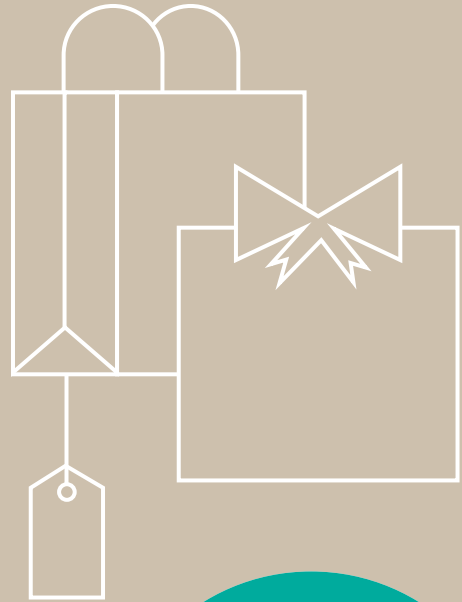


Fewer than one in ten people will do all of their festive grocery shopping online

## CHRISTMAS SPENDING

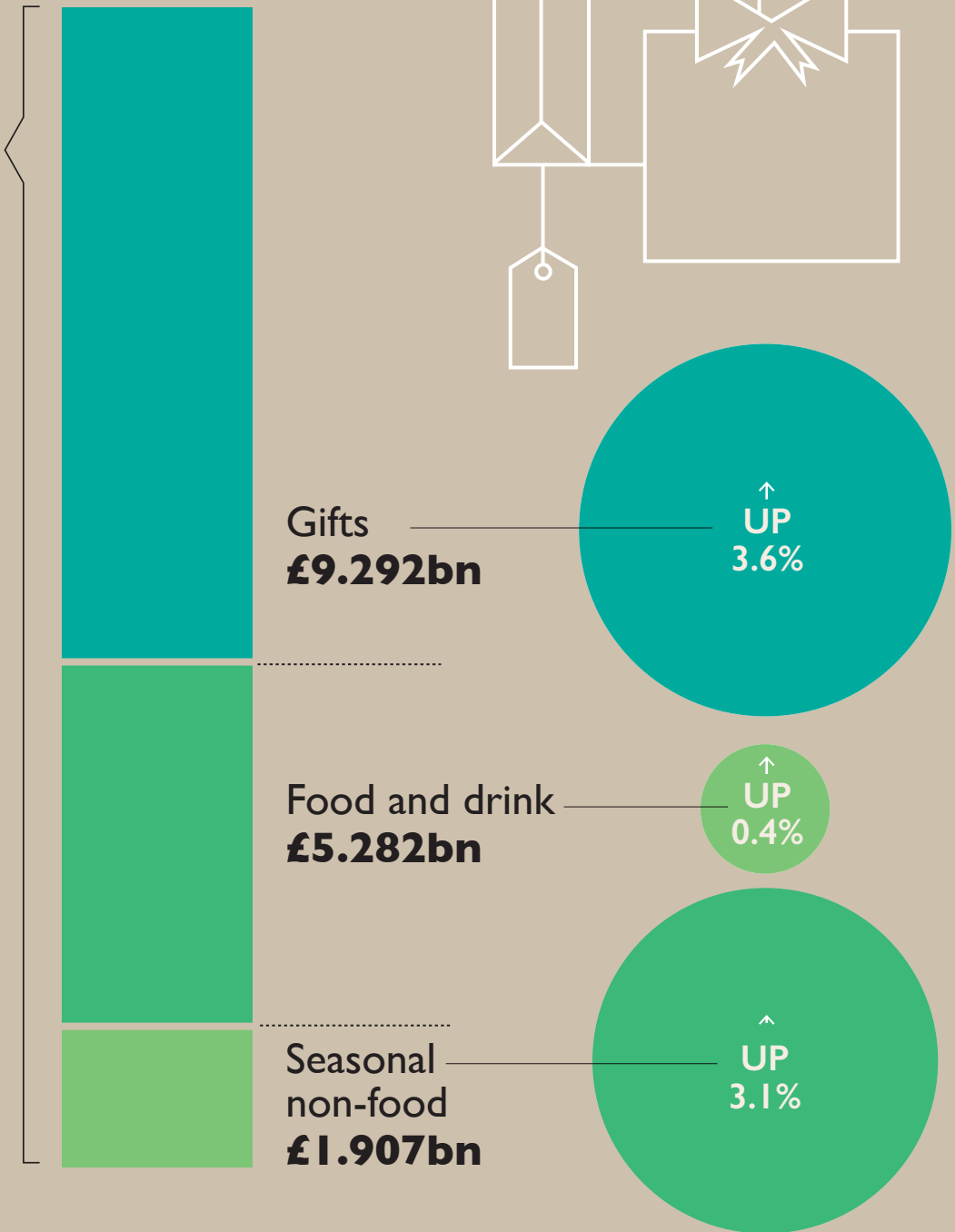
### BREAKDOWN OF 2015 CHRISTMAS SPENDING

This year consumers in the UK will spend just under £16.5bn on Christmas up 2.5% year on year.



**Total Christmas spending**

**£16.481 bn**



**SHOPPING EVENTS AND DAYS SPENDING**

**KNOWLEDGE OF AND PARTICIPATING IN SHOPPING EVENTS**

While a majority have heard of Black Friday and shopped during the event last year, Cyber Monday is less well known.

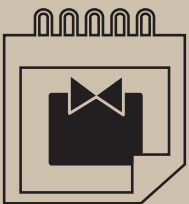
**More people intend to shop on Black Friday this year than last, but fewer intend to shop on Cyber Monday**

Percentage who will shop during specific events this year

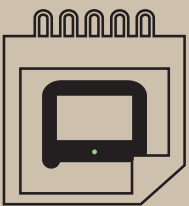
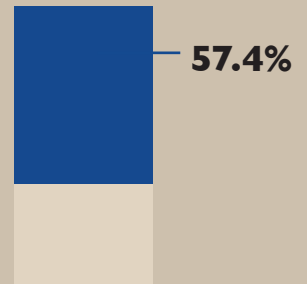
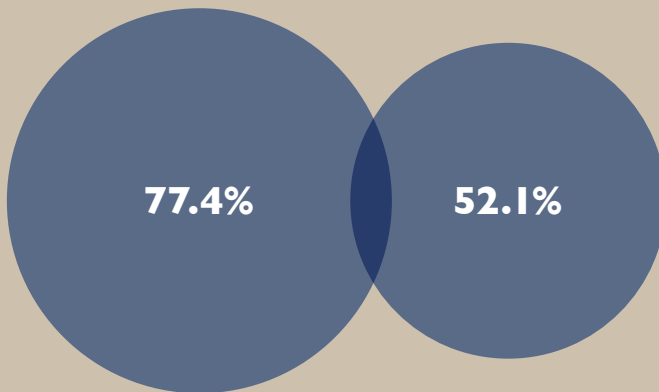
**Shopping Events**

**Have heard of this event**

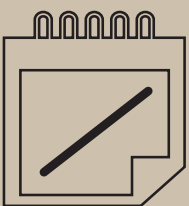
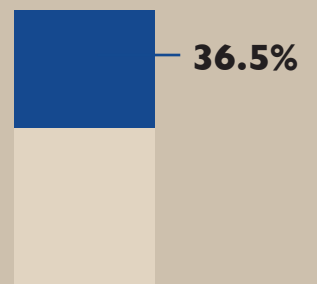
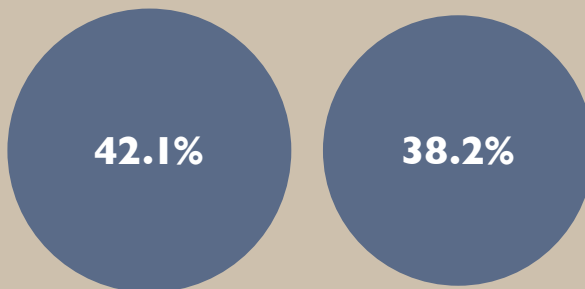
**Shopped during this event last year**



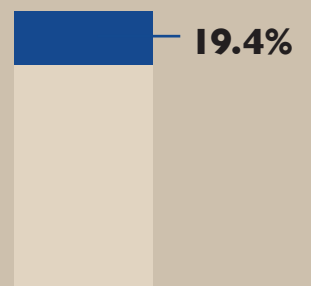
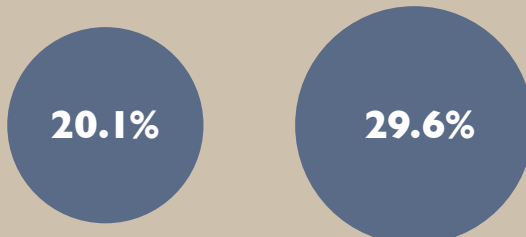
**BLACK FRIDAY**



**CYBER MONDAY**



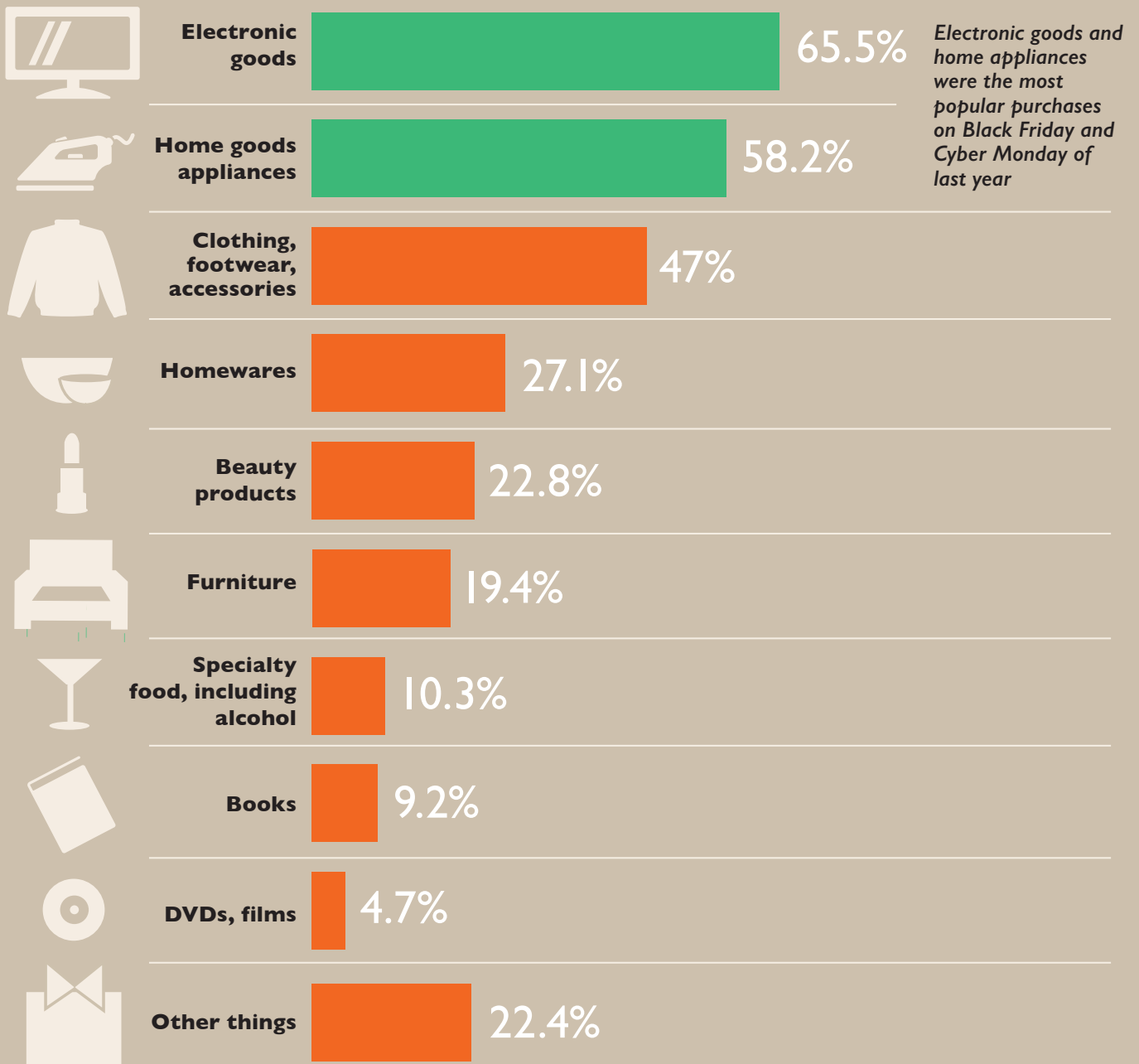
**NEITHER**



## SHOPPING EVENTS AND DAYS SPENDING

### WHAT PEOPLE BOUGHT ON BLACK FRIDAY AND CYBER MONDAY

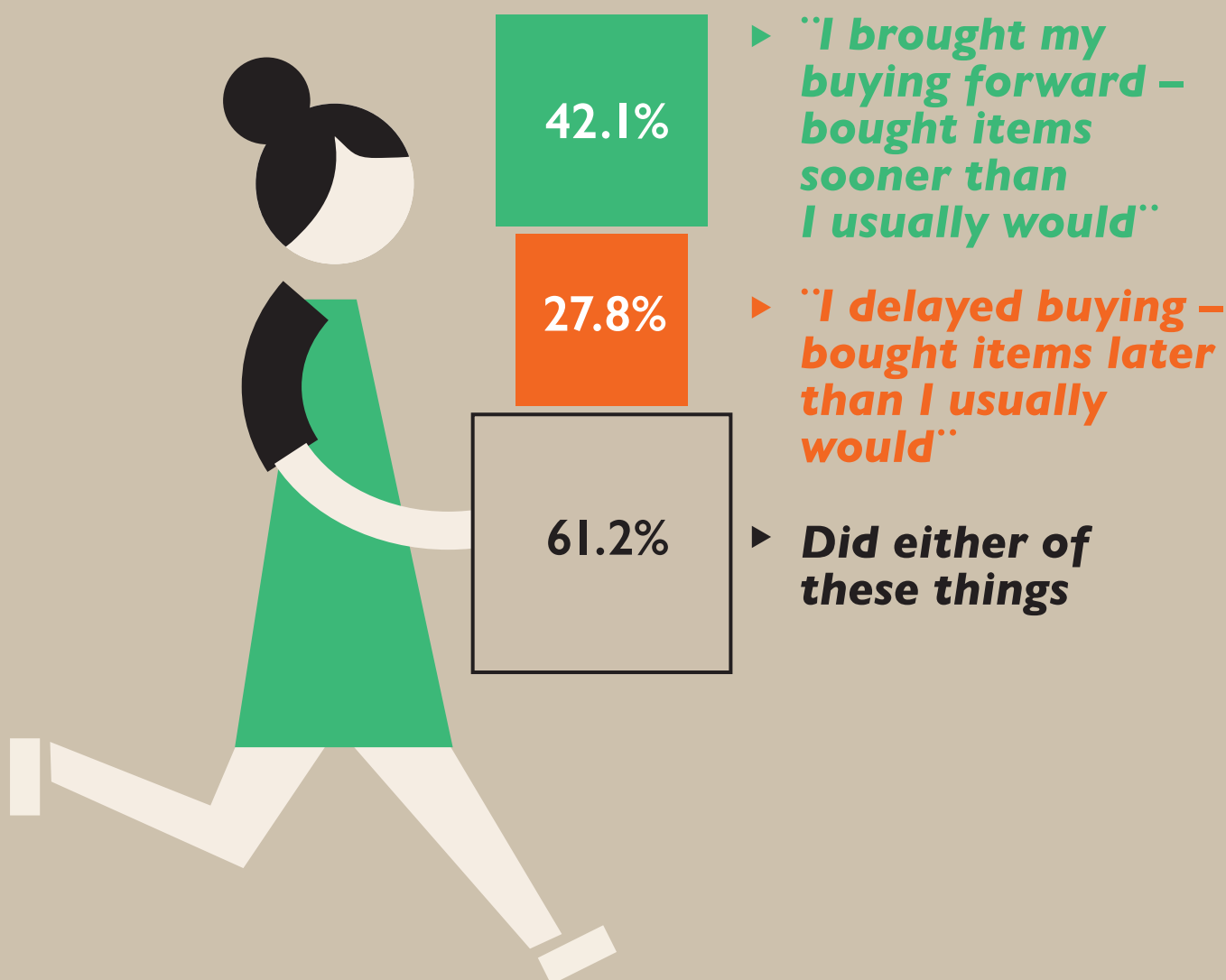
% of consumers who shopped on either or both of these days



## THE MAJORITY OF PURCHASES MADE ON BLACK FRIDAY AND CYBER MONDAY WERE PURCHASES THAT WOULD HAVE BEEN MADE AT SOME OTHER TIME

Were the purchases made on Black Friday or Cyber Monday delayed or brought forward?

Percentage of consumers who purchased items on either day



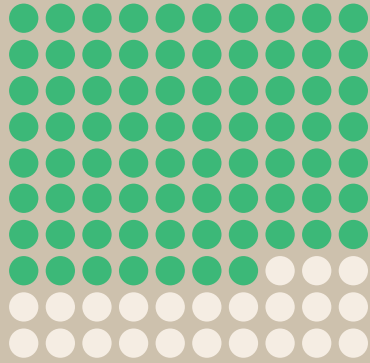
**BLACK FRIDAY DISPLACES EXISTING SALES RATHER THAN GENERATING NEW ONES**

For Black Friday 2014, some **61%** of consumers said that they either brought forward or delayed purchases they would have otherwise made. They did this to save money by snagging bargains.

## CHRISTMAS SPENDING

### BLACK FRIDAY IS BECOMING MORE POPULAR

**77.4%**  
of consumers  
have heard of  
Black Friday



**52.1%**  
shopped during  
Black Friday last  
year

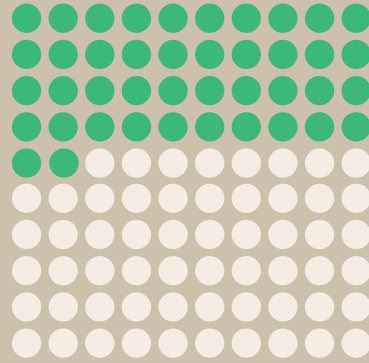


**57.4%**  
intend to shop  
during Black  
Friday

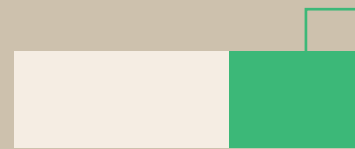


### CYBER MONDAY IS LESS POPULAR

**42.1%**  
of consumers  
have heard of  
Cyber Monday



**38.2%**  
shopped on  
Cyber Monday  
last year



**36.5%**  
due to shop on  
Cyber Monday  
this year



### SALES ON BLACK FRIDAY



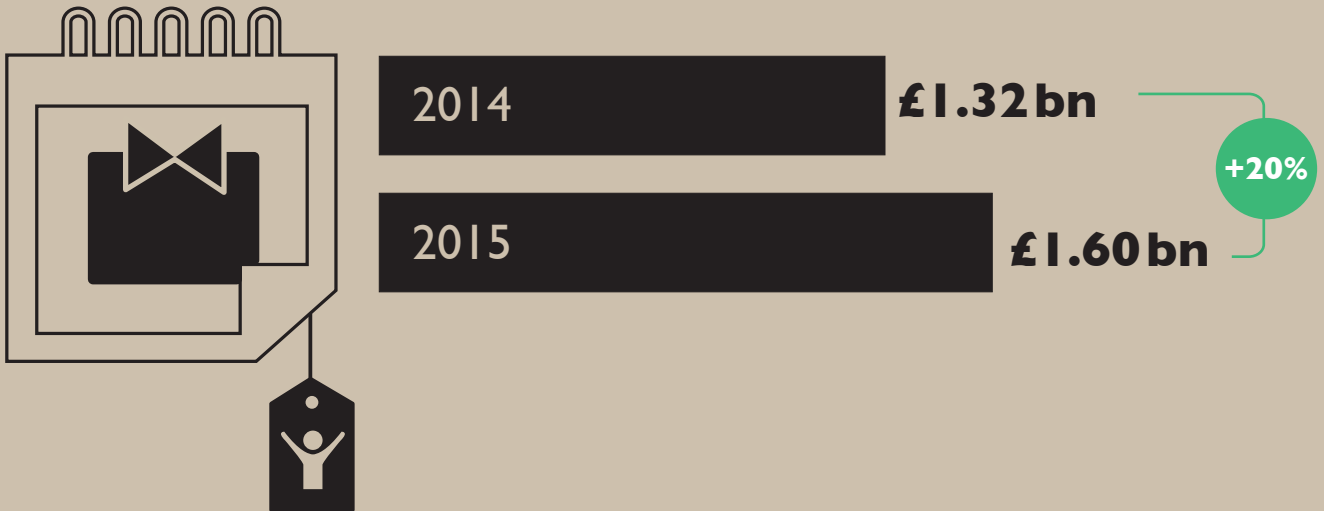
More people shopping and the purchase of big ticket items will drive up spend.



## THE VALUE OF BLACK FRIDAY

### BLACK FRIDAY SPENDING WILL GROW BY 20.1% THIS YEAR TO TOP £1.6bn

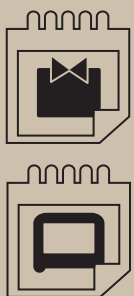
What consumers spent during Black Friday last year and will spend this year.



## THIS YEAR'S GIFT BUYING AND EVENTS

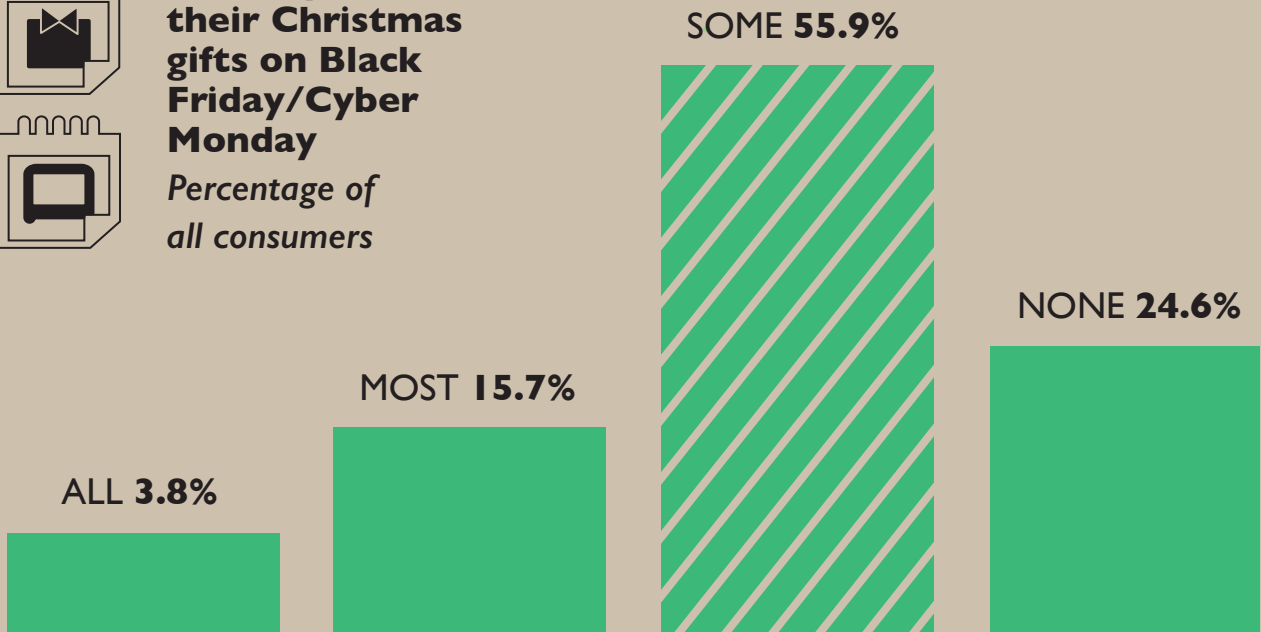
### OVER 3/4 OF CONSUMERS INTEND TO BUY AT LEAST SOME OF THEIR CHRISTMAS GIFTS ON BLACK FRIDAY OR CYBER MONDAY

What consumers will do in terms of gift buying on event days.



**Will buy all of their Christmas gifts on Black Friday/Cyber Monday**

*Percentage of all consumers*

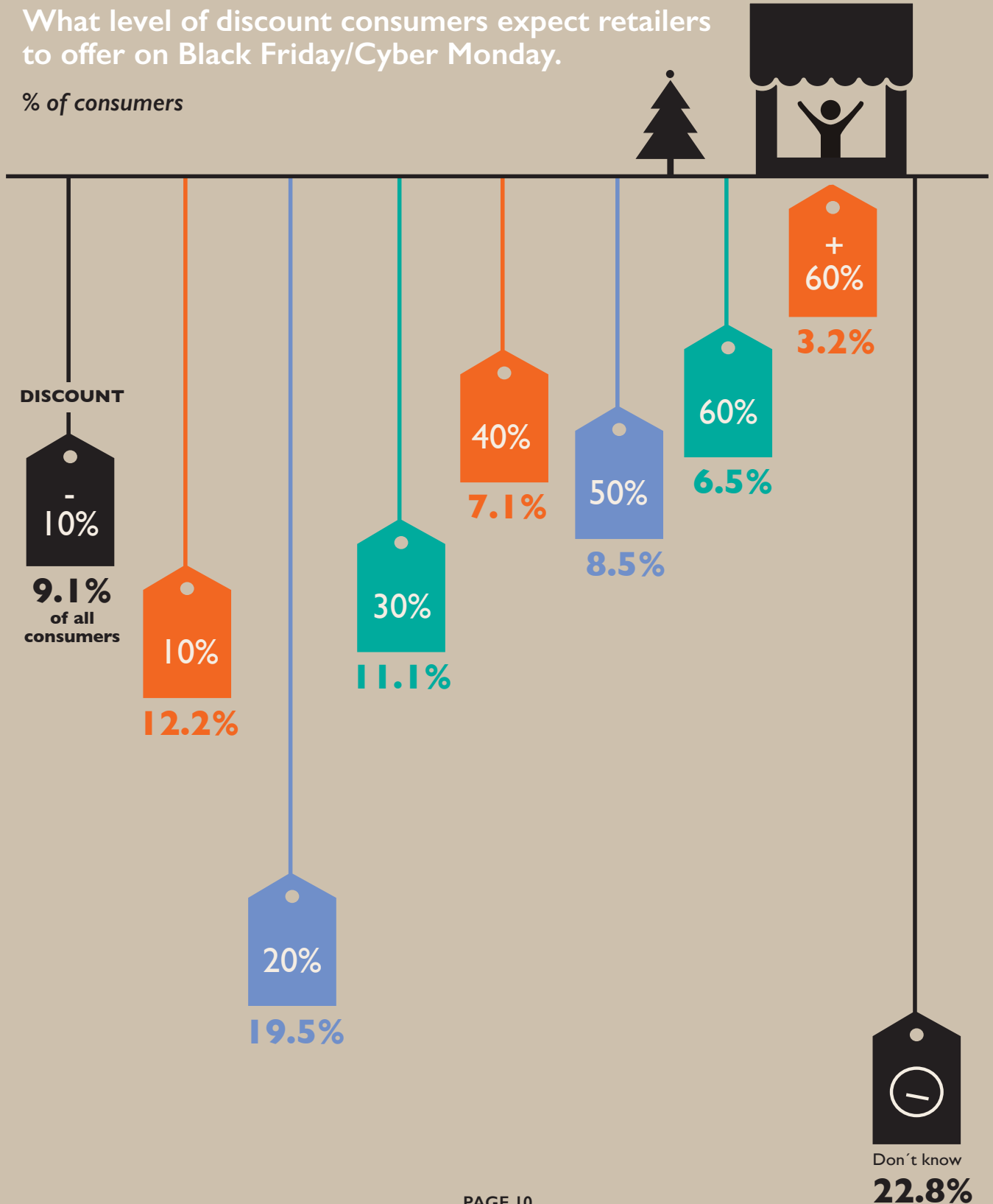


## DISCOUNT EXPECTATION

### ALMOST 1 IN 5 CONSUMERS EXPECT RETAILERS TO OFFER DISCOUNTS OF OVER 50% DURING BLACK FRIDAY AND CYBER MONDAY

What level of discount consumers expect retailers to offer on Black Friday/Cyber Monday.

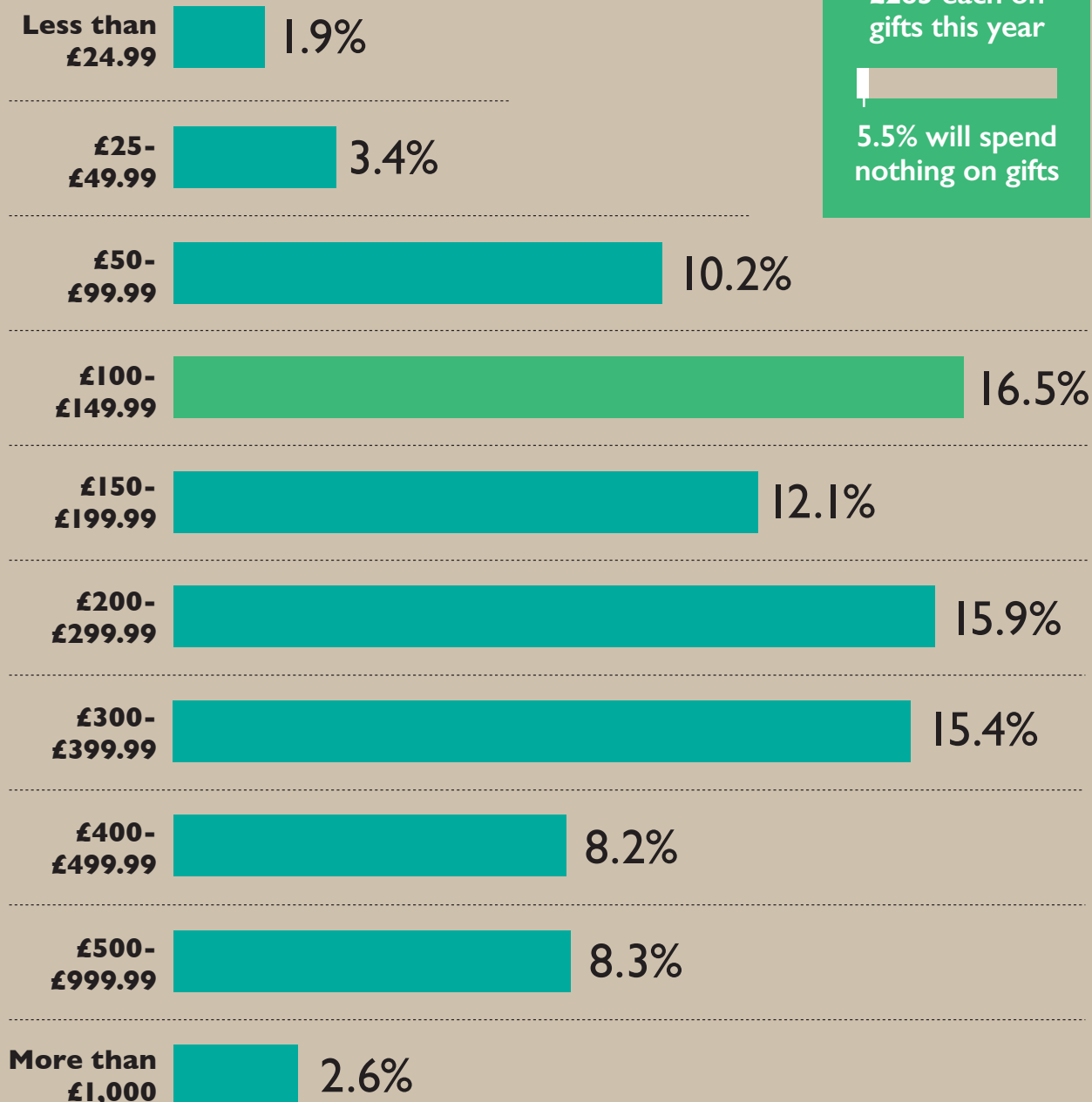
% of consumers



## CHRISTMAS GIFT SPENDING

### WHAT CONSUMERS INTEND ON CHRISTMAS GIFTS THIS YEAR

% of consumers



## CHRISTMAS GIFT SPENDING

### THE MAJORITY PLAN TO SPEND MORE OR THE SAME AS THEY DID LAST YEAR

How does your planned spending on Christmas gifts compare to last year?



Plan to spend more than last year

17.6%

Plan to spend about the same as last year

55.8%

Plan to spend less than last year

19.3%

Did not buy last year and will not buy this year

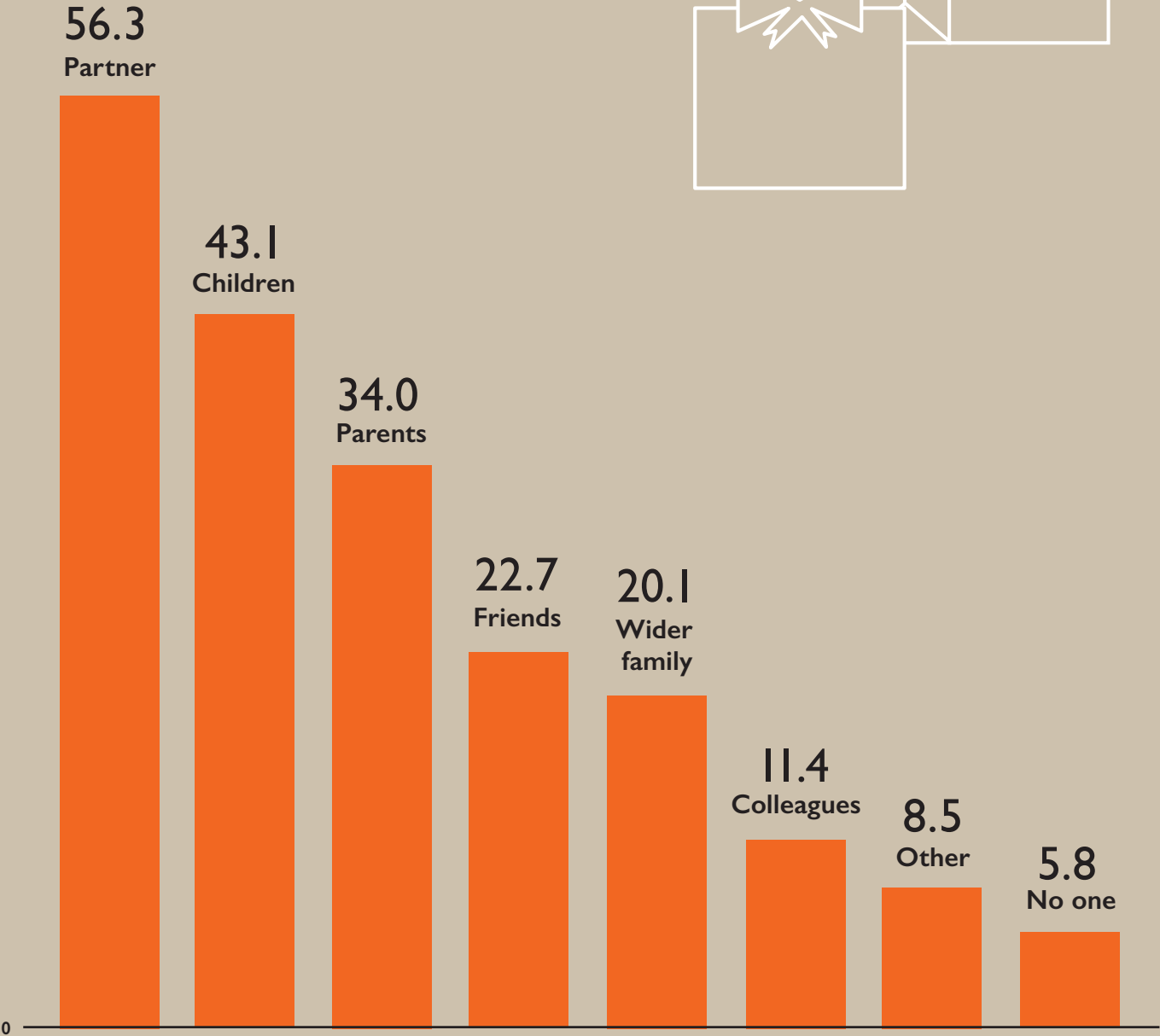
7.3%

**CHRISTMAS GIFT SPENDING**

**THE MAJORITY OF CONSUMERS WILL BUY GIFTS FOR THEIR PARTNERS, AND MORE WILL BUY GIFTS FOR FRIENDS THAN WILL FOR WIDER FAMILY**

Who consumers intend to buy gifts for this year.

*% of consumers*

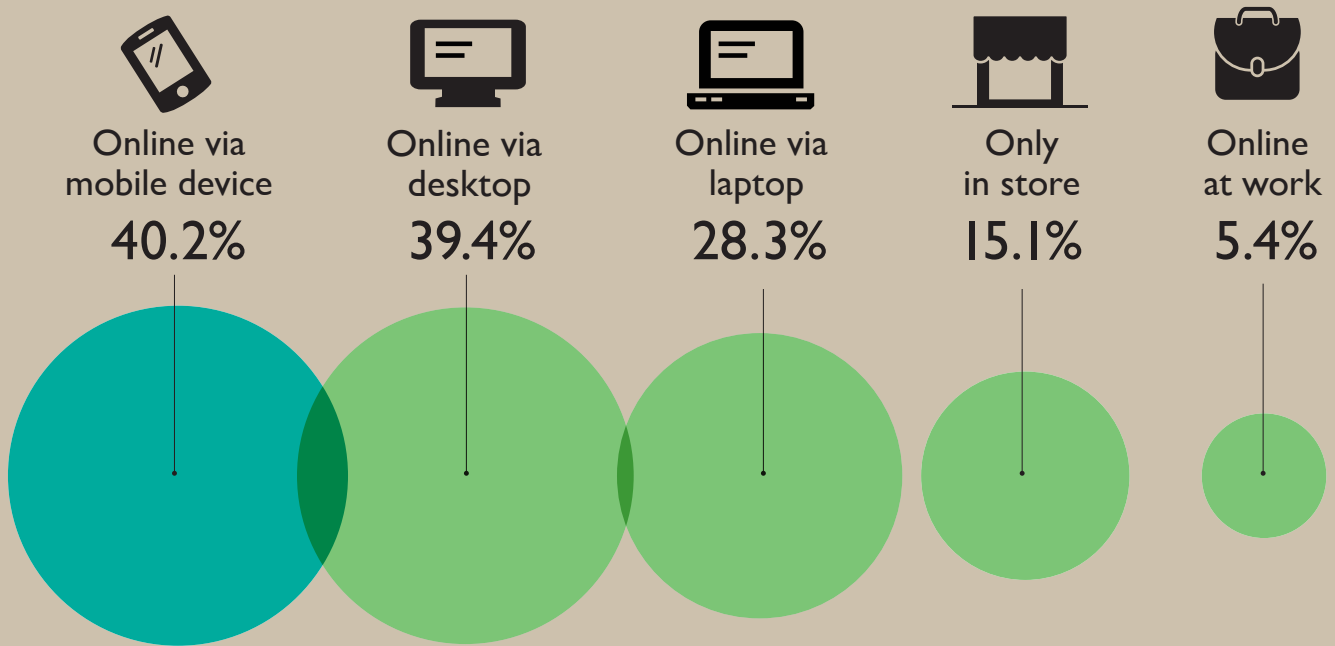


**STARTING GIFT SPENDING**

**4 OUT OF 10 CONSUMERS WILL SHOP FOR GIFTS ONLINE VIA A MOBILE DEVICE; VERY FEW WILL ONLY USE STORES TO DO THEIR GIFT BUYING**

How consumers will shop for gifts this year.

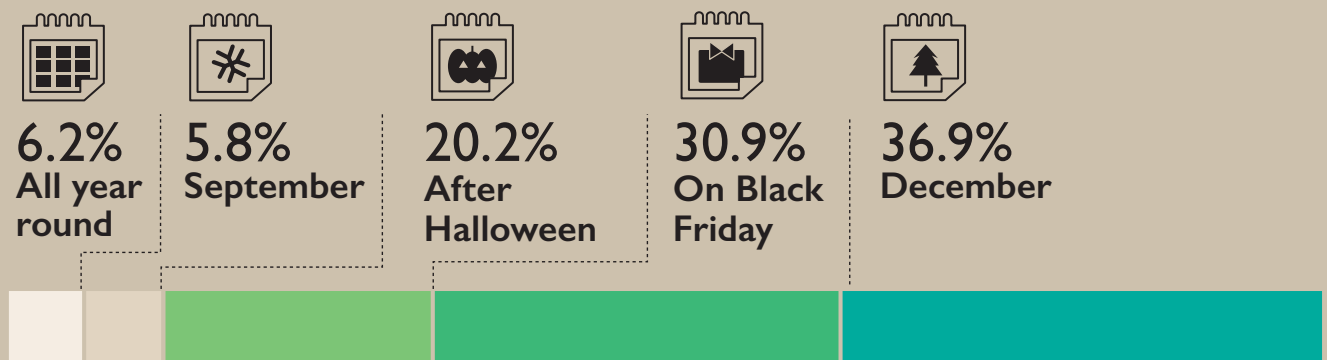
*% of consumers*



**BLACK FRIDAY HAS BECOME MORE OF A FOCAL POINT FOR THE START OF CHRISTMAS SHOPPING, BUT OVER A THIRD STILL START IN DECEMBER**

When consumers start Christmas shopping.

*% of consumers*

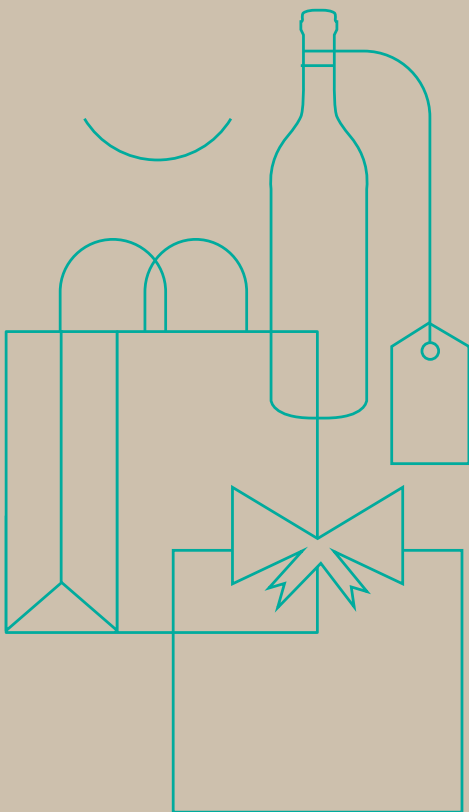


## CHRISTMAS BUDGET

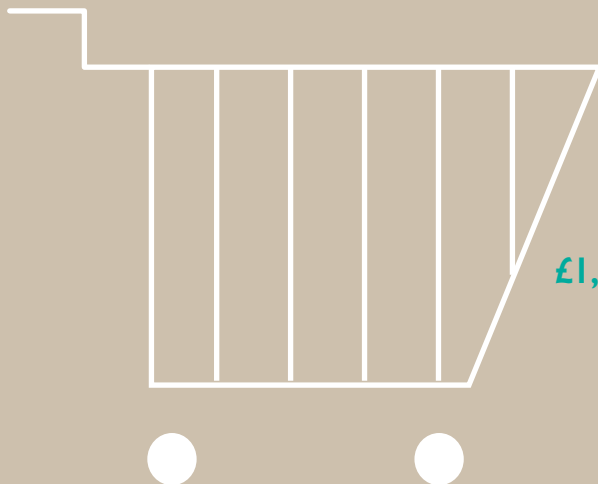
**ON AVERAGE, CONSUMERS WILL SPEND A TOTAL OF £442 ON ALL ASPECTS OF CHRISTMAS**

What is the total budget for Christmas?

*% of consumers*



**Average  
spend  
£442**



**5.1%**  
£1,000-£1,999.99

**1.7%**  
> £2,000

**2.3%**  
Nothing

**14.5%**  
Less than £100

**16.7%**  
£100-£199.99

**17.5%**  
£200-£299.99

**12.5%**  
£300-£399.99

**11.4%**  
£400-£499.99

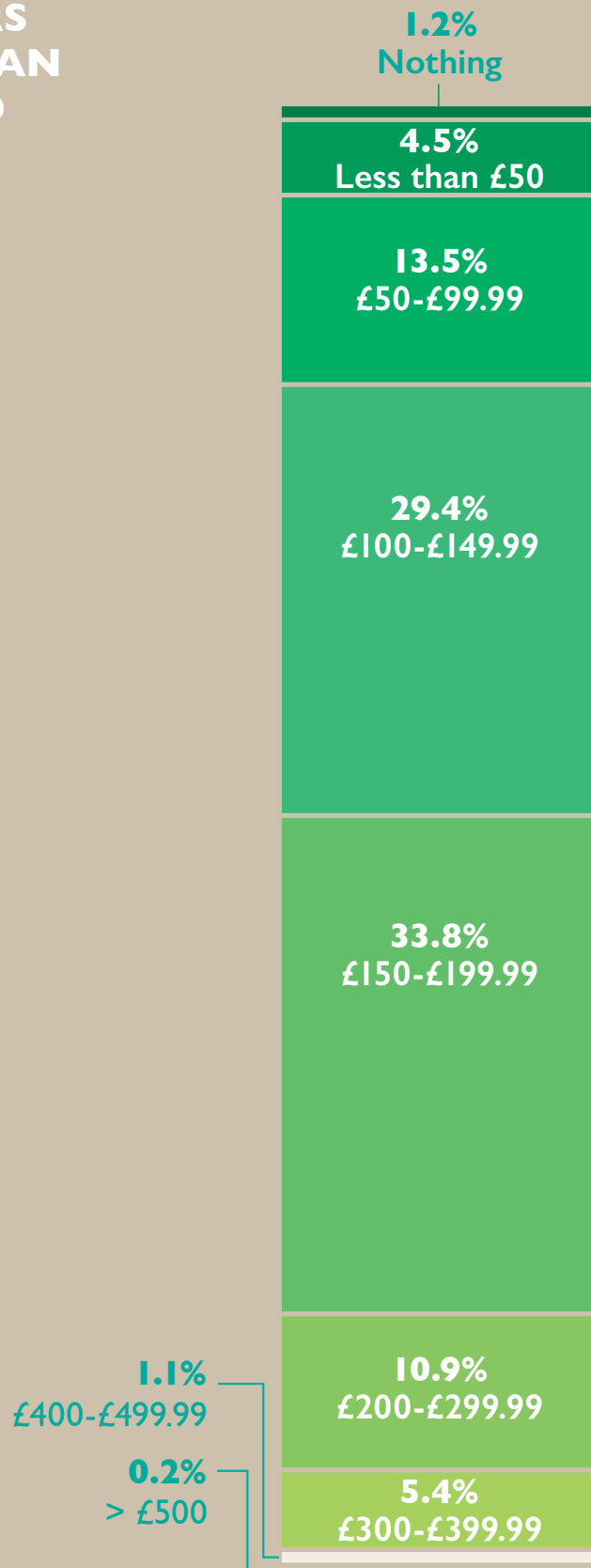
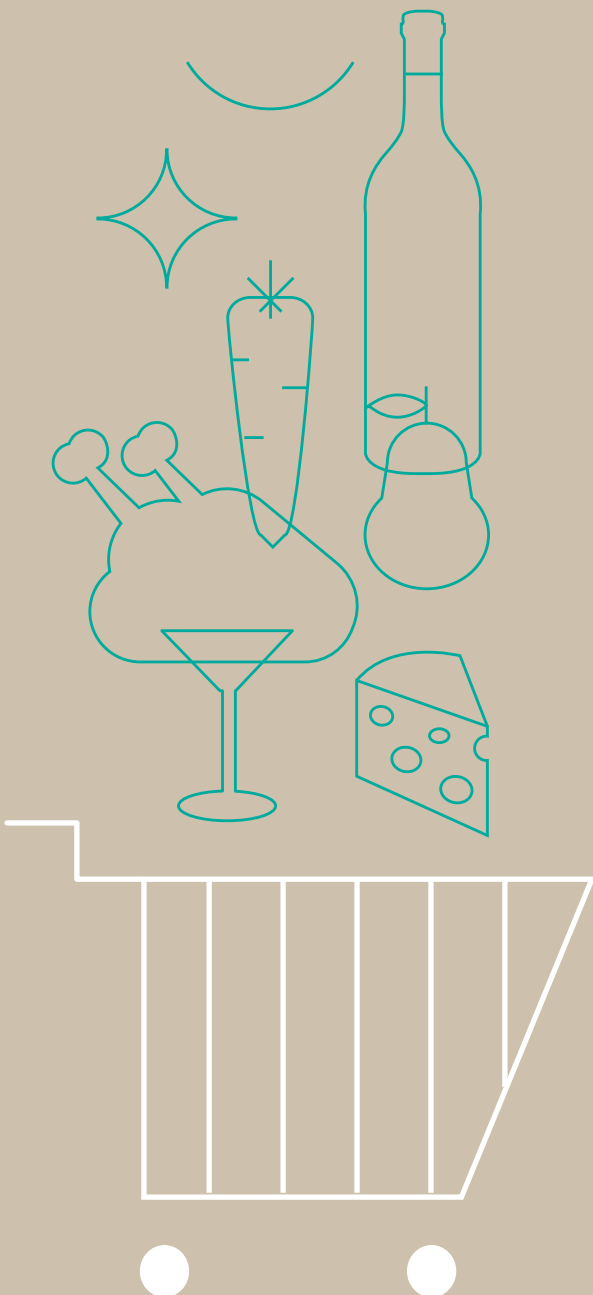
**18.3%**  
£500-£999.99

## CHRISTMAS GROCERY BUDGET

### OVER HALF OF CONSUMERS PLAN TO SPEND MORE THAN £150 ON CHRISTMAS FOOD AND GROCERIES

What is the total budget for Christmas groceries?

% of consumers



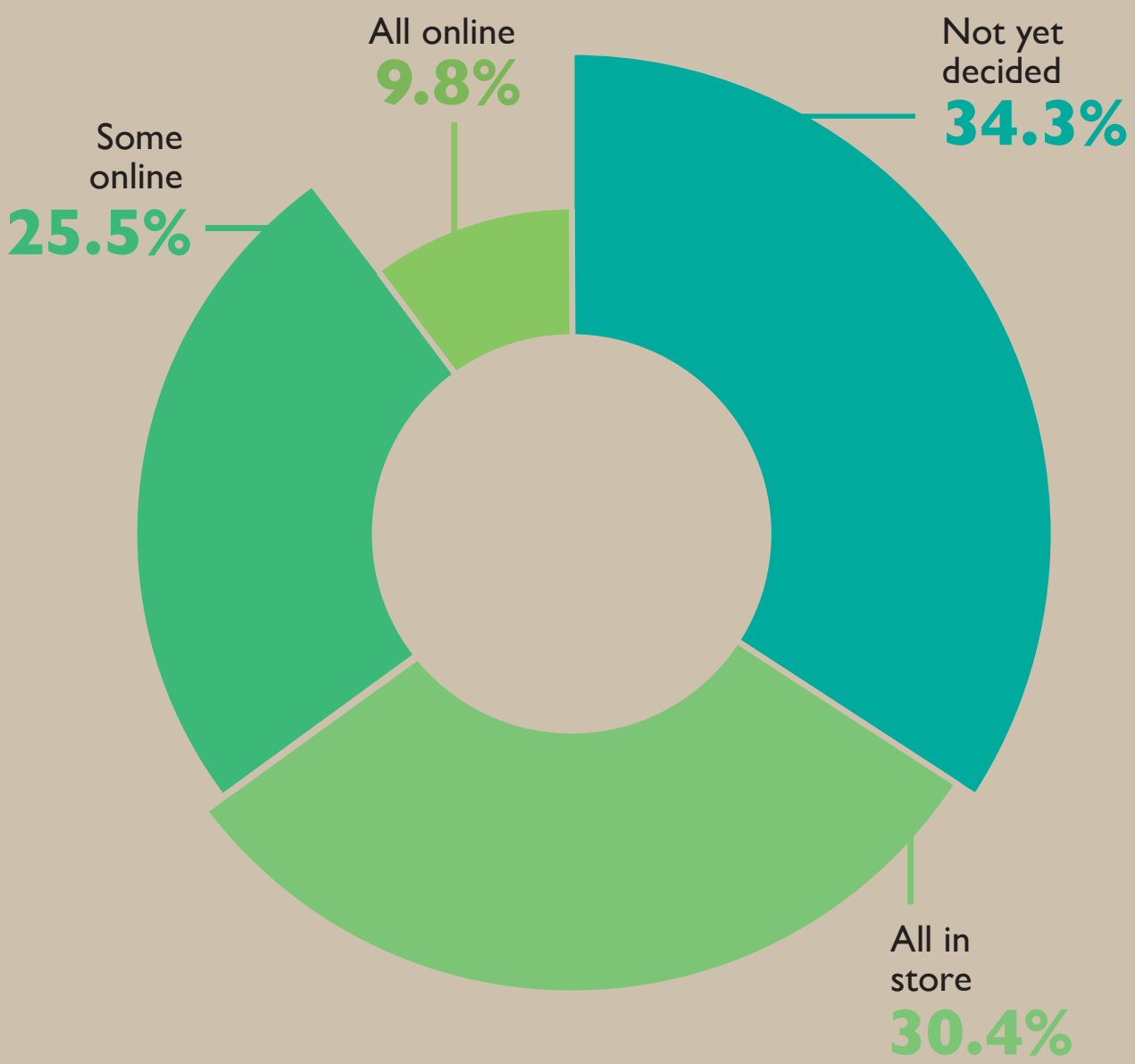


**SHOPPING FOR GROCERIES**

**LESS THAN ONE IN TEN CONSUMERS PLAN TO DO ALL OF THEIR FESTIVE GROCERY SHOPPING ONLINE**

How consumers will shop for online groceries this Christmas.

*% of consumers*

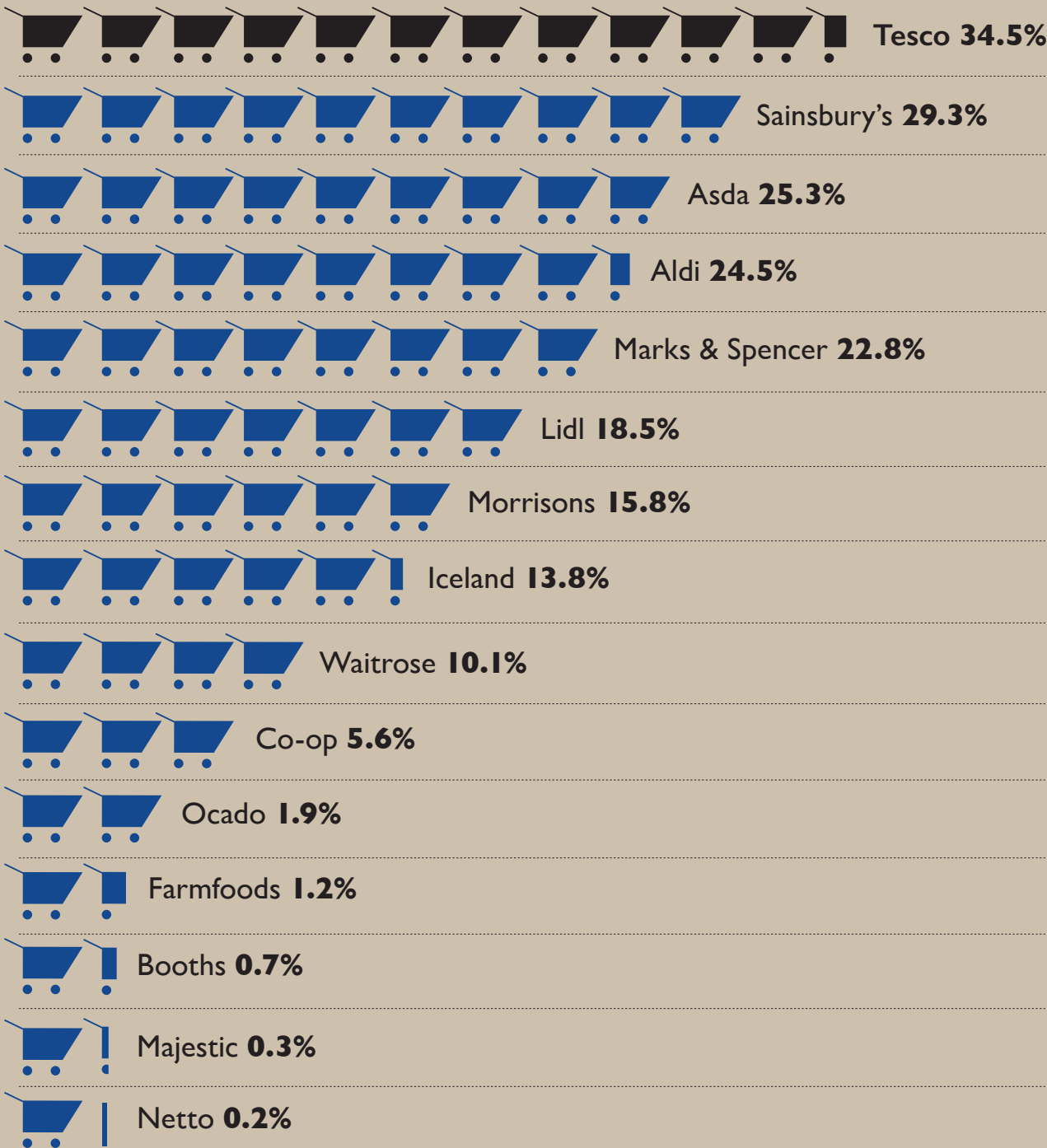


**GROCERY RETAILERS USED**

**TESCO RETAINS ITS LEADING POSITION, BUT NEARLY A QUARTER INTEND TO USE ALDI THIS CHRISTMAS**

Grocery retailers consumers plan to use for Christmas grocery shopping.

*% of consumers*



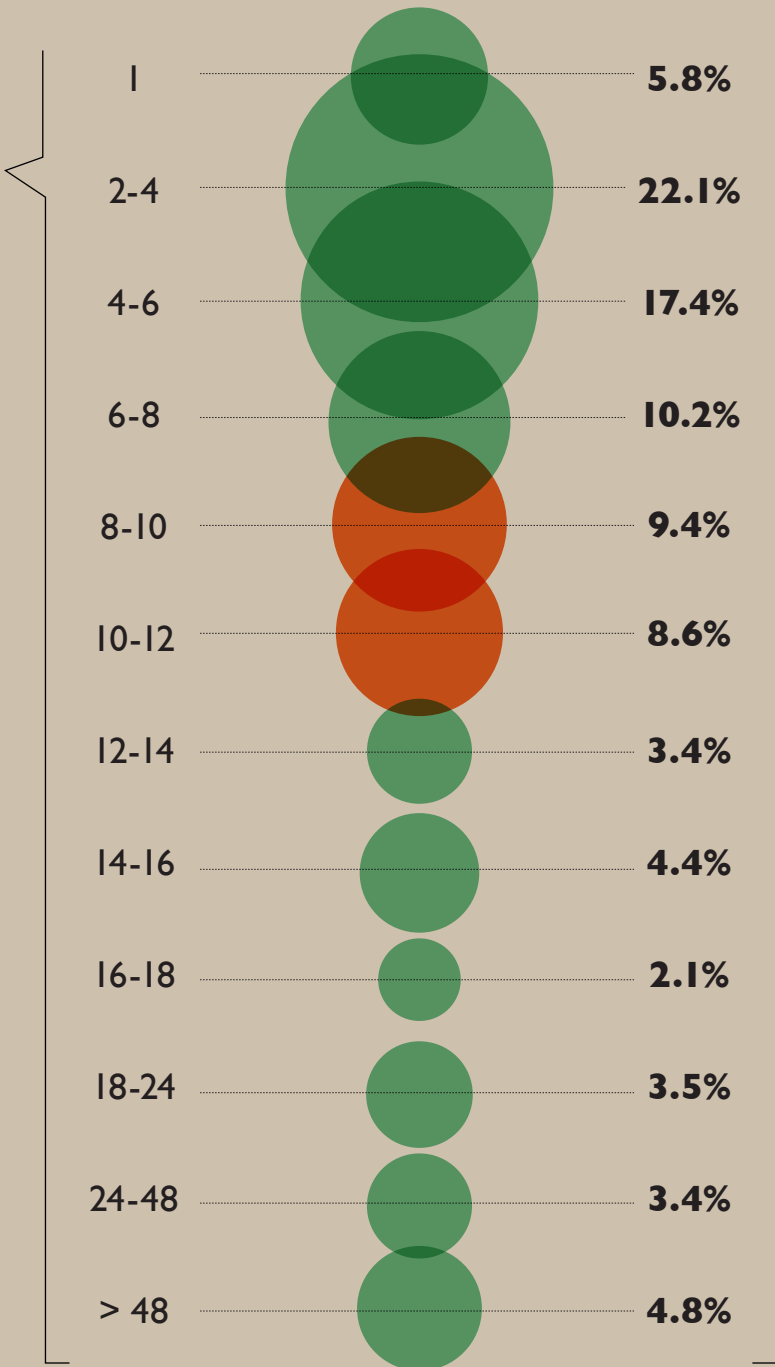
**TIME SPENT SHOPPING**

**THE AVERAGE CONSUMER WILL SPEND 10 HOURS CHRISTMAS SHOPPING**

How many hours will consumers spend in total shopping for both Christmas food and gifts.



**HOURS**



**CONSUMERS**

## **METHODOLOGY ABOUT THIS RESEARCH**

**A combination of consumer research, secondary research and market forecasting were used to compile this report.**

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Consumer research in this report is based on a survey conducted with a UK nationally representative poll of consumers. 2,059 consumers were interviewed during September and early October 2015 and questioned about their festive shopping plans and events such as Black Friday and Cyber Monday.

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All numbers relating to expenditure and forecast expenditure of retail are taken from Conlumino's own retail model. This is updated on an ongoing basis with inputs from official sources (such as the British Retail Consortium and Office for National Statistics), retailers' results and trading updates, other secondary sources and industry surveys, Conlumino's ongoing programme of research into consumer spending and habits, and underlying economic drivers and trends. Conlumino analysts both model and interpret this information to provide guidance on the likely future direction of retail expenditure at an overall, sector and category level.

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Unless otherwise stated, all sources of information are derived from Conlumino's own research and should be referenced to Conlumino/Webloyalty.



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