

CHRISTMAS TRENDS 2015

IRELAND



weblloyalty



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

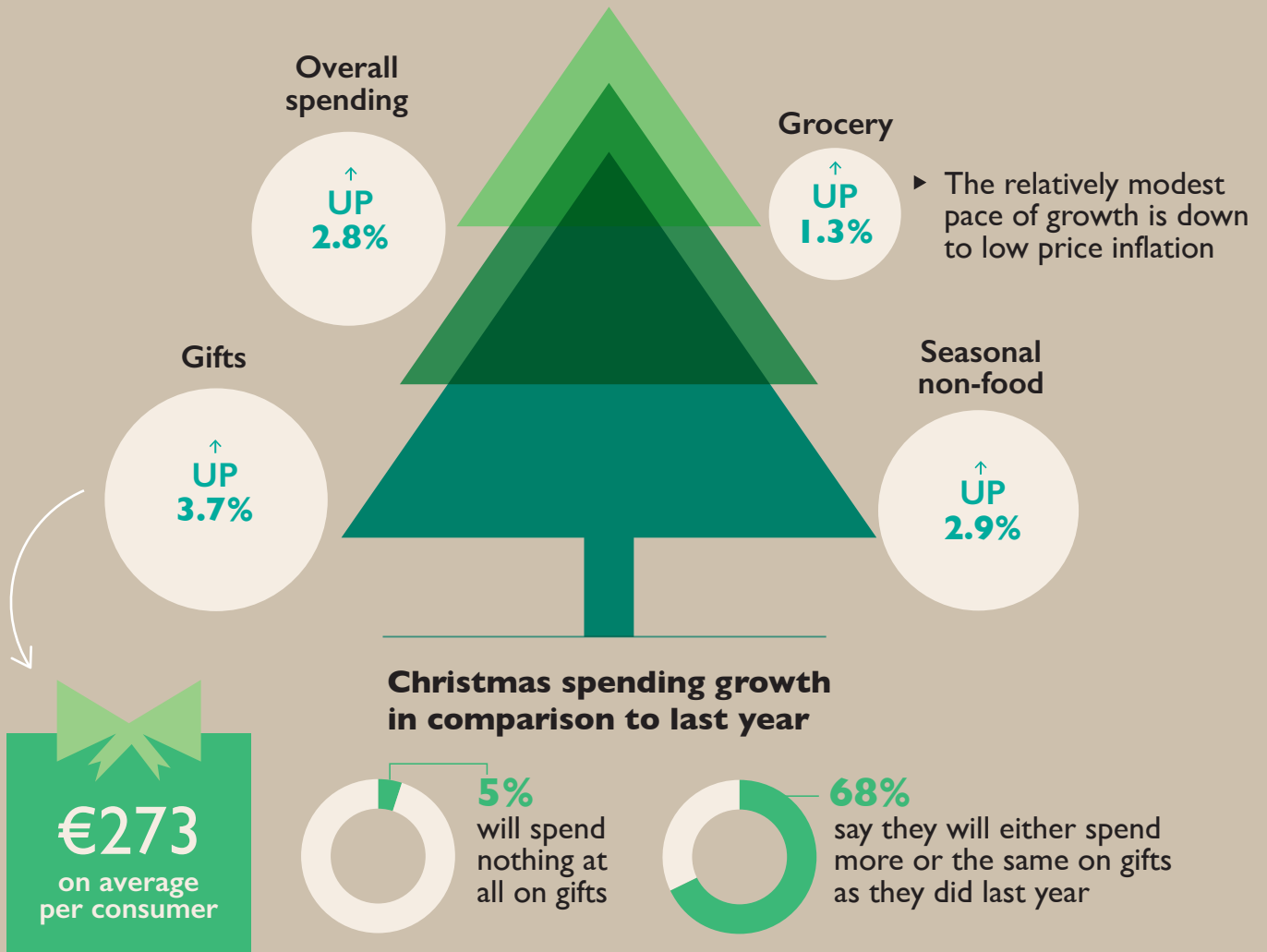
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CHRISTMAS SPENDING

CHRISTMAS SPENDING GROWTH IN COMPARISON TO LAST YEAR.



OVERALL BUDGET

On average per consumer

€435

including



Gifts



Food



Groceries

TIME SHOPPING

Spend on average per consumer

Last year



9hs

This year

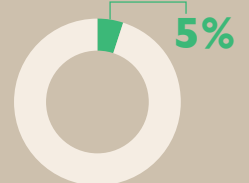


10hs

ONLINE VS OFFLINE

Grocery shopping is still done in store

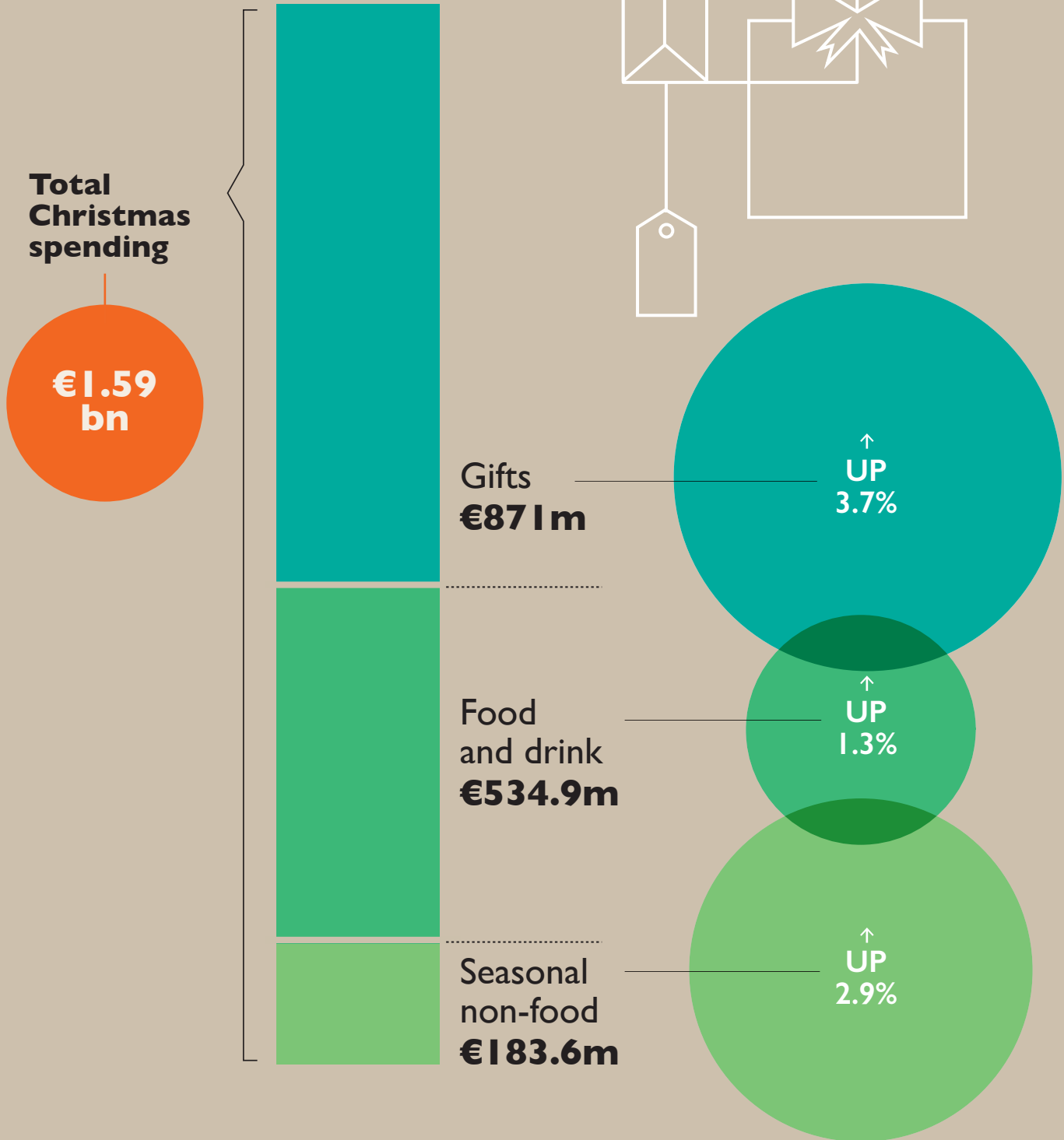
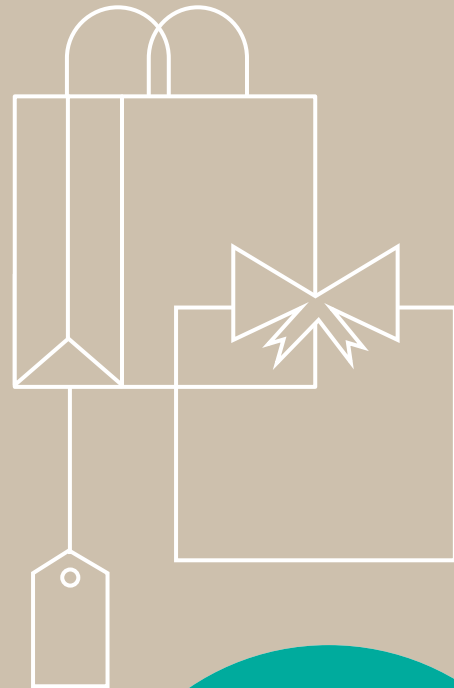
Only around 5% people will do all of their festive grocery shopping online.



CHRISTMAS SPENDING

BREAKDOWN OF 2015 CHRISTMAS SPENDING

This year the UK will spend just under €1.6bn on Christmas, up 2.8% year on year.



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

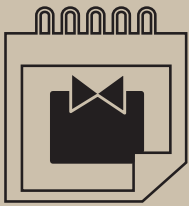
More people intend to shop on Black Friday this year than last, but fewer intend to shop on Cyber Monday

Percentage who will shop during specific events this year

Shopping Events

Have heard of this event

Shopped during this event last year

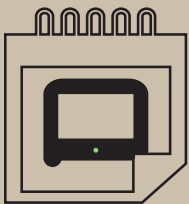


BLACK FRIDAY

72.8%

44.1%

51.3%

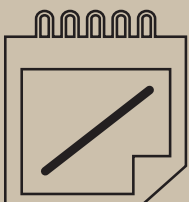


CYBER MONDAY

33.9%

22.8%

31.8%



NEITHER

25.6%

36.7%

22.1%

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

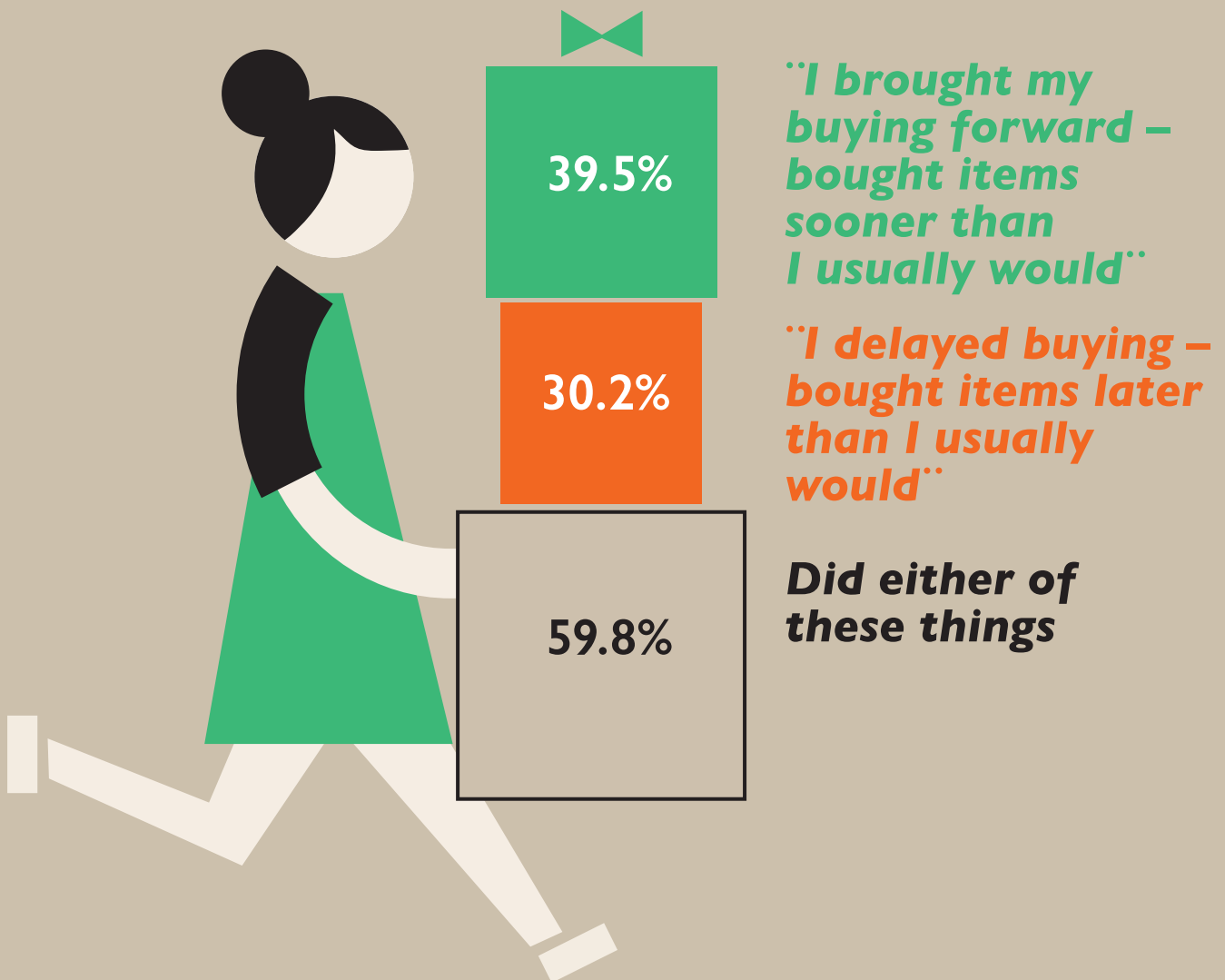


Electronic goods and home appliances were the most popular purchases on Black Friday and Cyber Monday of last year

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?

% of consumers who purchased items on either day



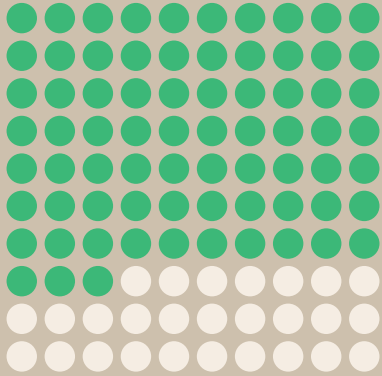
BLACK FRIDAY DISPLACES EXISTING SALES RATHER THAN GENERATING NEW ONES

For Black Friday 2014, some **59%** 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

73%
of consumers have heard of Black Friday



44%
shopped during Black Friday last year

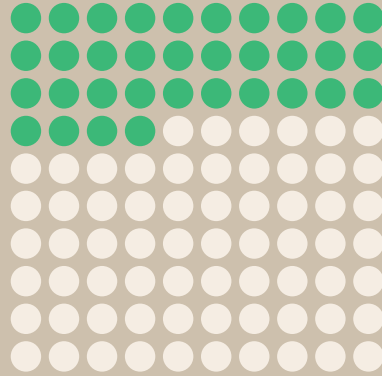


51%
intend to shop during Black Friday



CYBER MONDAY IS LESS POPULAR

33.9%
of consumers have heard of Cyber Monday



34%
shopped on Cyber Monday last year



32%
due to shop on Cyber Monday this year



SALES ON BLACK FRIDAY



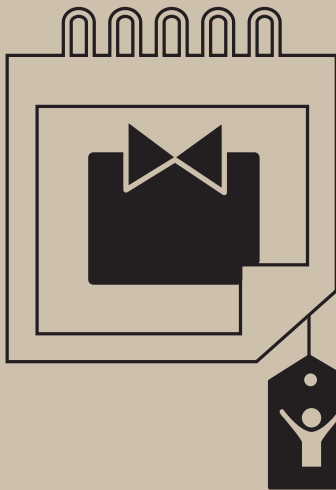
This year
€108.7 m
That's up **31%**
on last year

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

THE VALUE OF BLACK FRIDAY

BLACK FRIDAY SPENDING WILL GROW BY 30.9% THIS YEAR TO TOP €108M

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



2014

€83.1m

2015

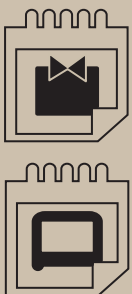
€108.7m

Please note that Black Friday sales include all sales made during Black Friday, regardless of whether these are part of Black Friday promotions and regardless of whether they would have otherwise been made. Both online sales and sales made in stores are included.

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

ALL 2.1%

MOST 12.8%

SOME 58.3%

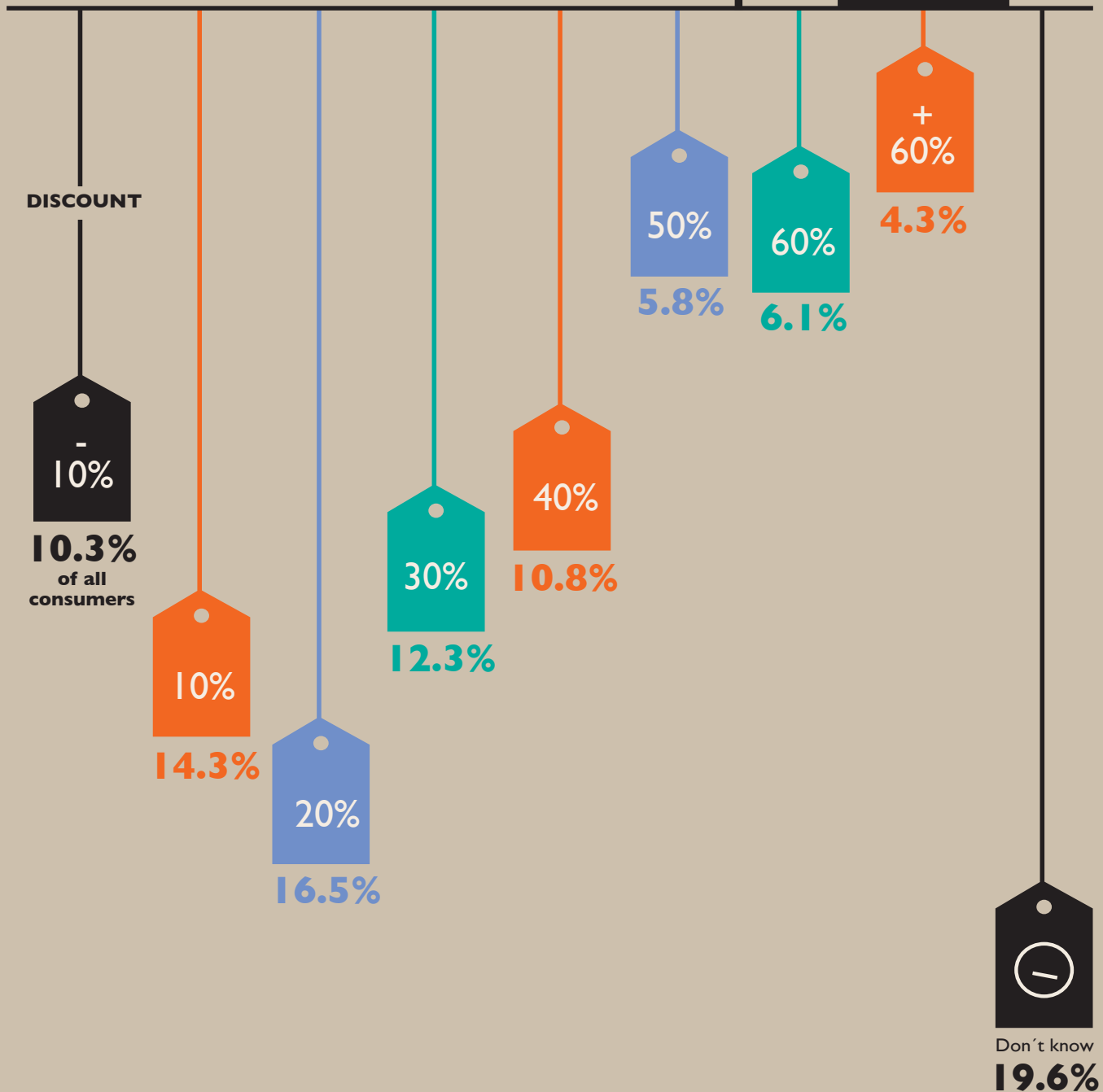
NONE 26.8%

DISCOUNT EXPECTATION

16% OF CONSUMERS EXPECT RETAILERS TO OFFER DISCOUNTS OF OVER 50% DURING BLACK FRIDAY/CYBER MONDAY

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

% of consumers



CHRISTMAS GIFT SPENDING

WHAT CONSUMERS INTEND TO SPEND ON CHRISTMAS GIFTS THIS YEAR

% of consumer



Less than €24.99 2.1%

€25-€49.99 4.9%

€50-€99.99 9%

€100-€149.99 15.9%

€150-€199.99 20.3%

€200-€299.99 15.4%

€300-€399.99 6.2%

€400-€499.99 5%

€500-€999.99 10.1%

More than €1,000 6.2%

On average, consumers will spend a total of €273 each on gifts this year

4.9% will spend nothing on gifts

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

19.3%

Plan to spend about the same as last year

48.4%

Plan to spend less than last year

28.1%

Did not buy last year and will not buy this year

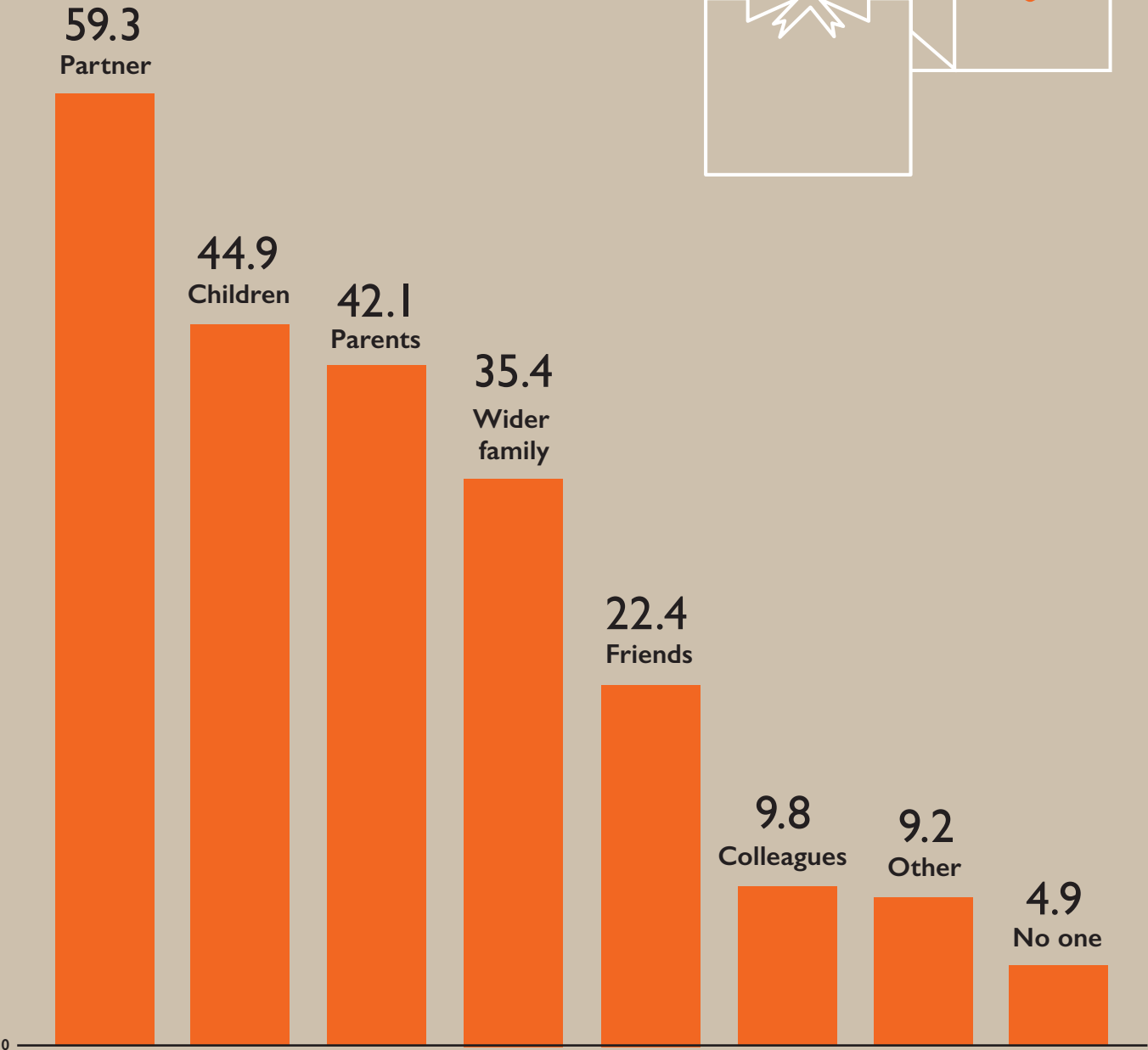
4.2%

CHRISTMAS GIFT SPENDING

THE MAJORITY OF CONSUMERS WILL BUY GIFTS FOR THEIR PARTNERS, 1 IN 10 WILL BUY GIFTS FOR COLLEAGUES

Who consumers intend to buy gifts for this year?

% of consumers

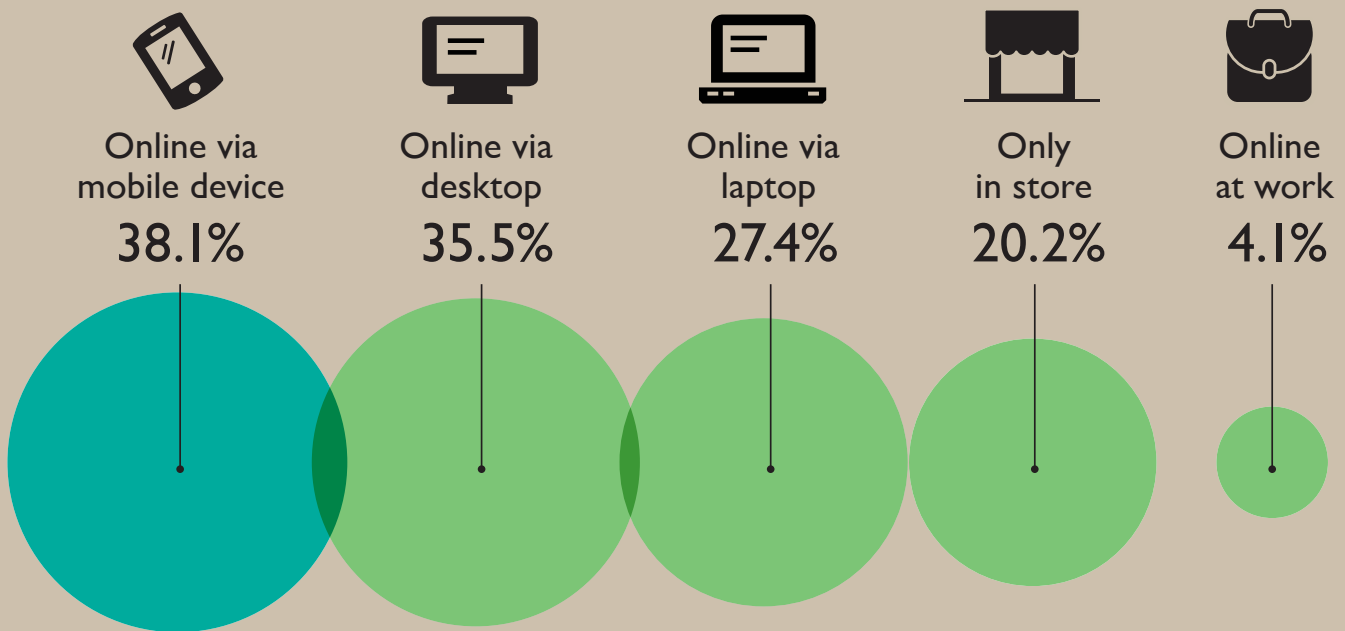


STARTING GIFT SPENDING

A FIFTH OF CONSUMERS WILL ONLY SHOP FOR GIFTS IN STORES, NEARLY 4 IN 10 WILL SHOP ONLINE VIA A MOBILE DEVICE

How consumers will shop for gifts this year.

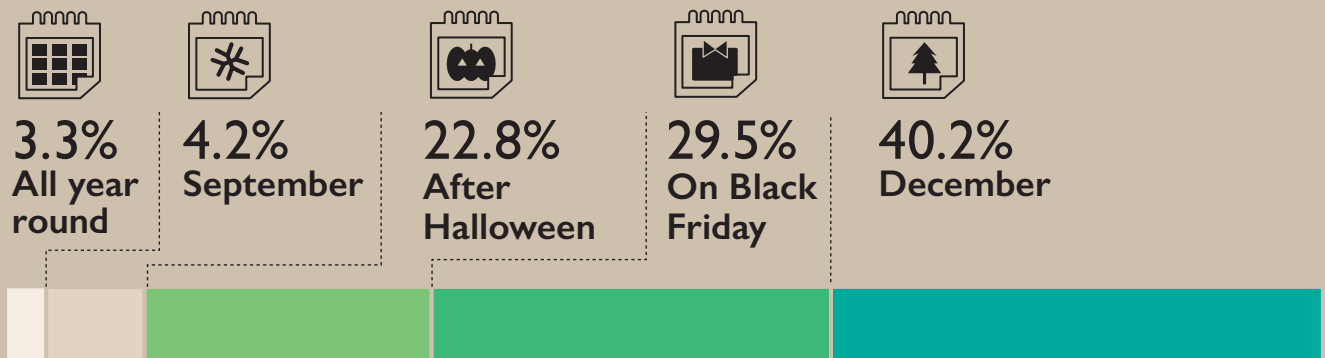
% of consumers



BLACK FRIDAY HAS BECOME MORE OF A FOCAL POINT FOR THE START OF CHRISTMAS SHOPPING, BUT 40% STILL START IN DECEMBER

When consumers start Christmas shopping.

% of consumers

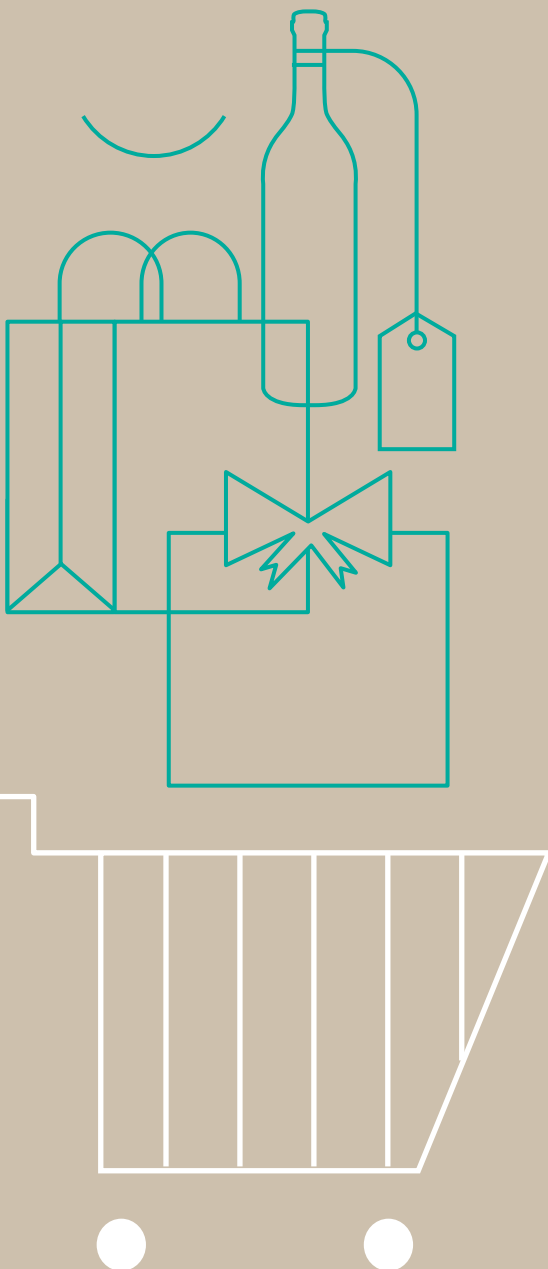


CHRISTMAS BUDGET

ON AVERAGE, CONSUMERS WILL SPEND A TOTAL OF €435 ON ALL ASPECTS OF CHRISTMAS

What is the total budget for Christmas?

% of consumers



**Average
spend
€435**

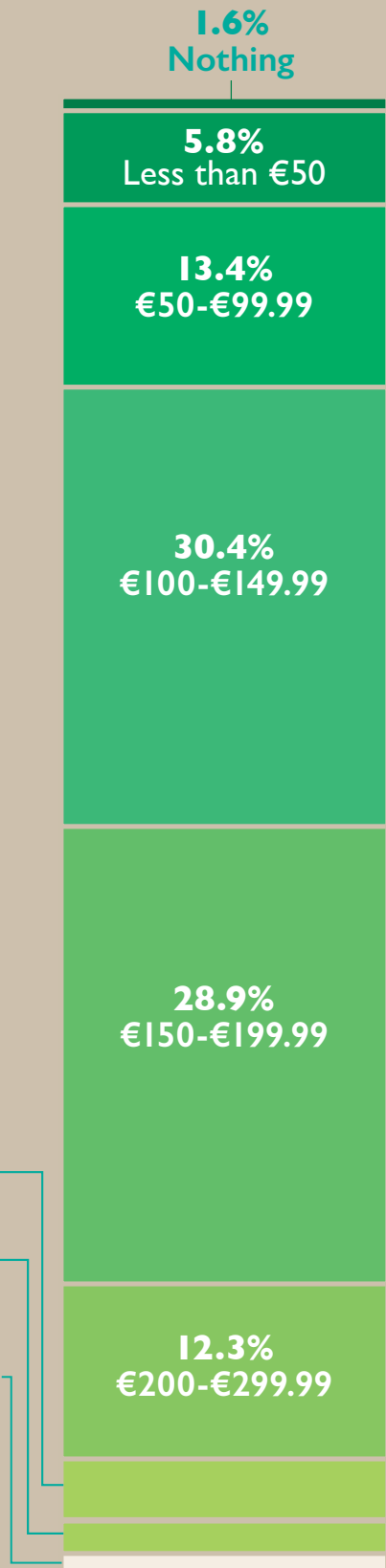
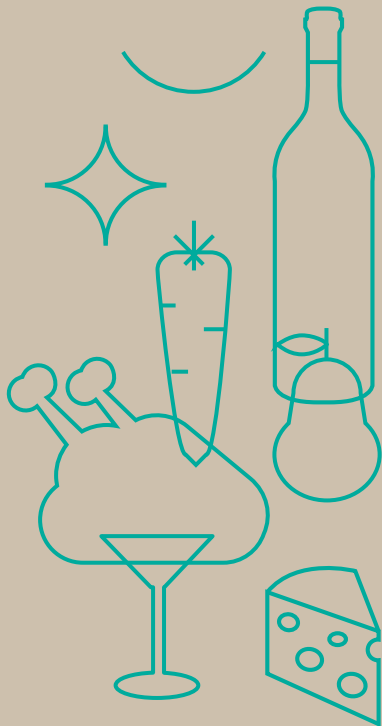


CHRISTMAS GROCERY BUDGET

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

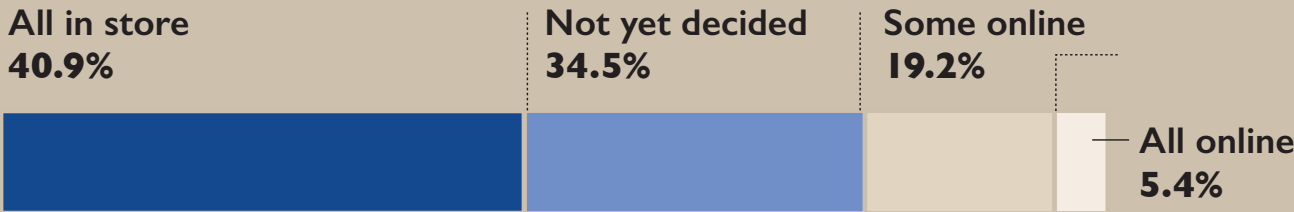


SHOPPING FOR GROCERIES

ONLY 5% OF CONSUMERS PLAN TO DO ALL OF THEIR FESTIVE GROCERY SHOPPING ONLINE

How consumers will shop for online groceries this Christmas.

% of consumers

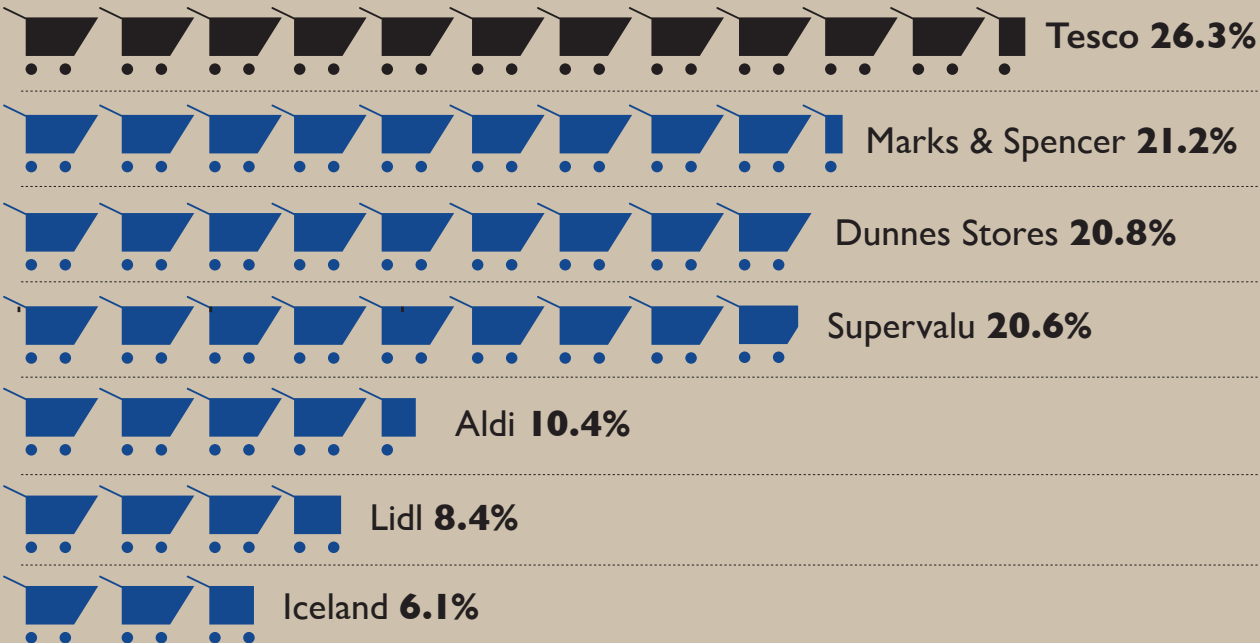


GROCERY RETAILERS USED

TESCO AND M&S REMAIN POPULAR DESTINATIONS FOR THE FESTIVE FOOD SHOP

Grocery retailers consumers plan to use for Christmas grocery shopping.

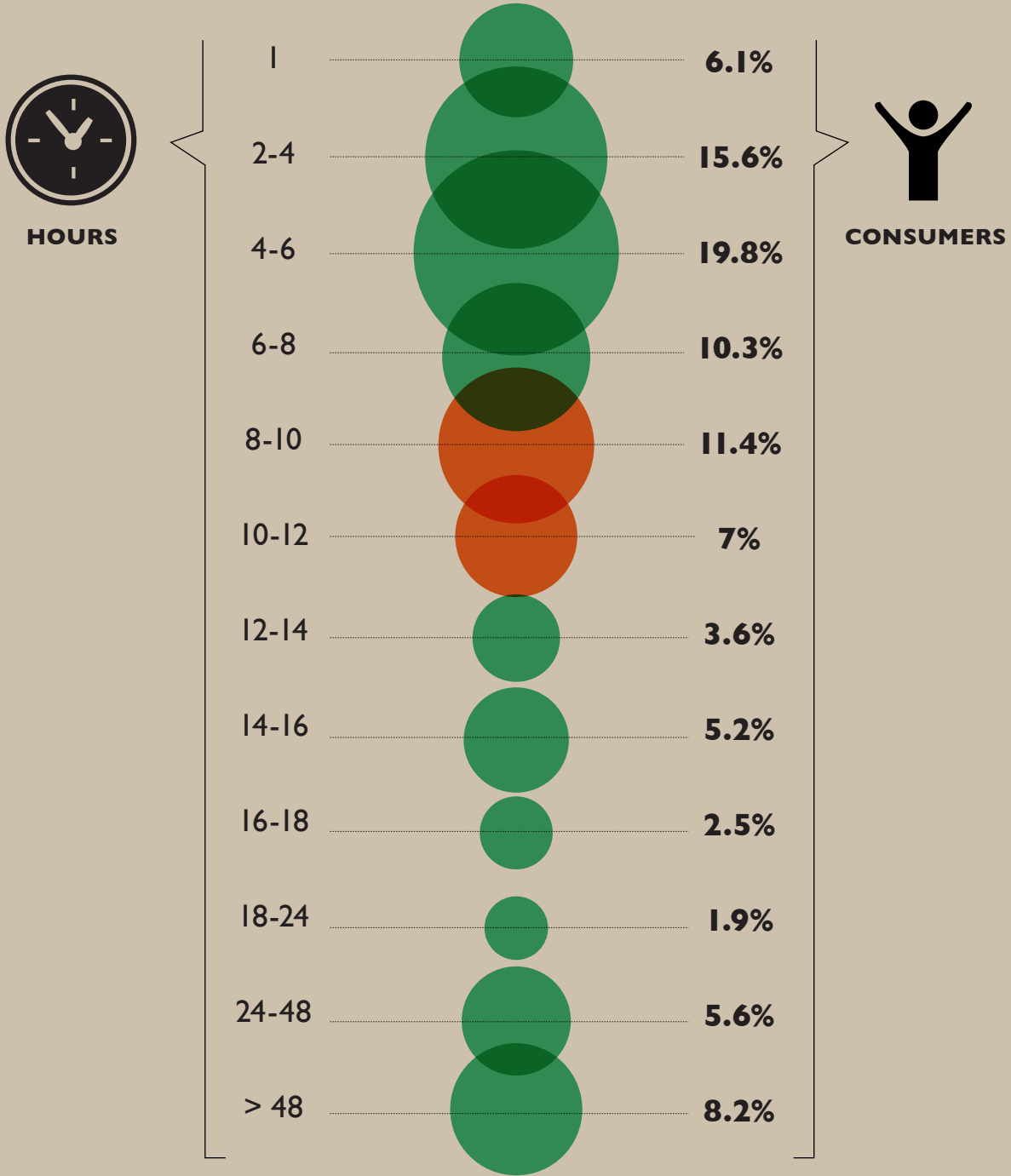
% of consumers



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.



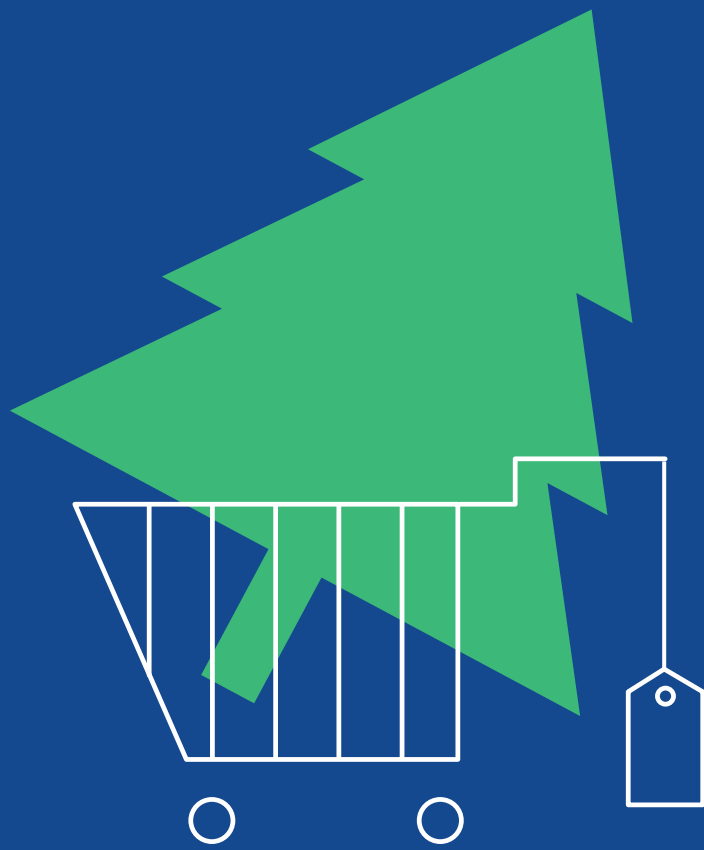
METHODOLOGY ABOUT THIS RESEARCH

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

Consumer research in this report is based on a survey conducted with an Irish nationally representative poll of consumers. 1,508 consumers were interviewed during September and early October 2015 and questioned about their festive shopping plans and events such as Black Friday.

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, 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.

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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