

## **Christmas Survey 2019**

UK results  
November 2019

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# Estimated Christmas spending by concept

## 2018 vs 2019 (UK)<sup>(2)</sup>

	Actual spending 2018 (£)	Estimated spending 2019 (£)		
Gifts	294	299	1.7%	↑
Food	146	143	-2.1%	↓
Socialise	68	63	-7.4%	↓
Travelling	51	62	21.6%	↑
Total	560 <sup>(1)</sup>	567	1.3%	↑

## 2018 vs 2019 (Europe)<sup>(2)</sup>

	Actual spending 2018 (£)	Estimated spending 2019 (£)		
Gifts	168	171	1.8%	↑
Food	113	116	2.7%	↑
Socialise	43	45	4.7%	↑
Travelling	72	76	5.6%	↑
Total	396	409 <sup>(1)</sup>	3.3%	↑

Note: 1) Please note that total figures may not add-up due to round-off error  
2) Currency converted from EUR to GBP at an average exchange rate of 1EUR = 0.887586GBP for the period 16 September 2019 to 11 October 2019

## Highlight



Spending on **Traveling** has significantly increased this year, followed by Gifts.

UK consumers will spend £567 average this year (+1.3% compared with 2018)

Shoppers in the UK expect to spend 38.6% more on average compared to shoppers in the rest of Europe

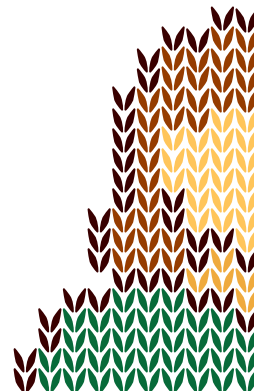
When you look at the major areas of spending consumers in the UK spend more on gifts, food and socialising but less on travelling at Christmas compared to the European average.

More than half of UK shoppers' Christmas spend (~53%) will be on gifts compared to ~42% on average in Europe.

# Expected best sellers

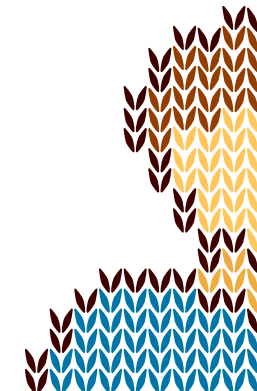
1	Chocolates	→
2	Books	→
3	Cosmetics/Perfumes	→
4	Food & Drinks	→
5	Money	↑ +1
6	Clothes/shoes	↓ -1
7	Gift vouchers	→
8	DVD/Blue Ray	→
9	Beauty care, massage, spa	→
10	Games	↑ +1

**Chocolates** will be the most purchased gift this year by consumers in the UK. Books, Cosmetics and perfumes, Food & Drinks, and Money make up the rest of the **top 5 of best sellers**.



## Women

1. Chocolates
2. Cosmetics/Perfumes
3. Books
4. Food & Drink
5. Money (cash)



## Men

1. Chocolates
2. Books
3. Food & Drink
4. Cosmetics/Perfumes
5. Money (cash)



# Expected best sellers (kids and teens)

**Books** will be the favorite gift option for kids once again this year. For teenagers, **Money** has climbed to the top of the list.

**Sportswear** is the fastest growing category for gifts teenagers, and **Dolls & Plush toys** moved up four positions to 5<sup>th</sup> place on the list of the most popular gifts for kids.

## Kids

1	Books	→
2	Clothes/shoes	↑ +1
3	Arts & Crafts	↓ -1
4	Baby articles and toys	↑ +1
5	Dolls & Plush	↑ +4
6	Board games	↓ -2
7	Educational toys	↓ -1
8	Action toys	↓ -1
9	Model construction toys	↓ -1
10	Technical toys	→

## Teens

1	Money	↑ +1
2	Videogames	↓ -1
3	Books	→
4	Chocolates	→
5	Clothes/shoes	→
6	Gift vouchers	↑ +1
7	Cosmetics/Perfumes	↓ -1
8	DVD/Blue Ray	→
9	Sportswear	↑ +5
10	Gift cards	↑ +1

# Estimated Christmas spending by channel

## Estimated budget (UK)<sup>(2)</sup>

	Actual spending 2018 (£)	Estimated spending 2019 (£)		
Online	240	250	4.2%	↑
Offline	320	318	-0.6%	↓
<b>Total</b>	<b>560</b>	<b>567<sup>(1)</sup></b>	<b>1.3%</b>	<b>↑</b>

## Estimated budget (Europe)<sup>(2)</sup>

	Actual spending 2018 (£)	Estimated spending 2019 (£)		
Online	128	134	4.7%	↑
Offline	268	275	2.6%	↑
<b>Total</b>	<b>396</b>	<b>409</b>	<b>3.3%</b>	<b>↑</b>

Note: 1) Please note that total figures may not add-up due to round-off error

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## Conclusions

1

UK consumers will spend an average of £250 online this Christmas, representing ~44% of their total spend (compared to 32.7% on average in Europe)

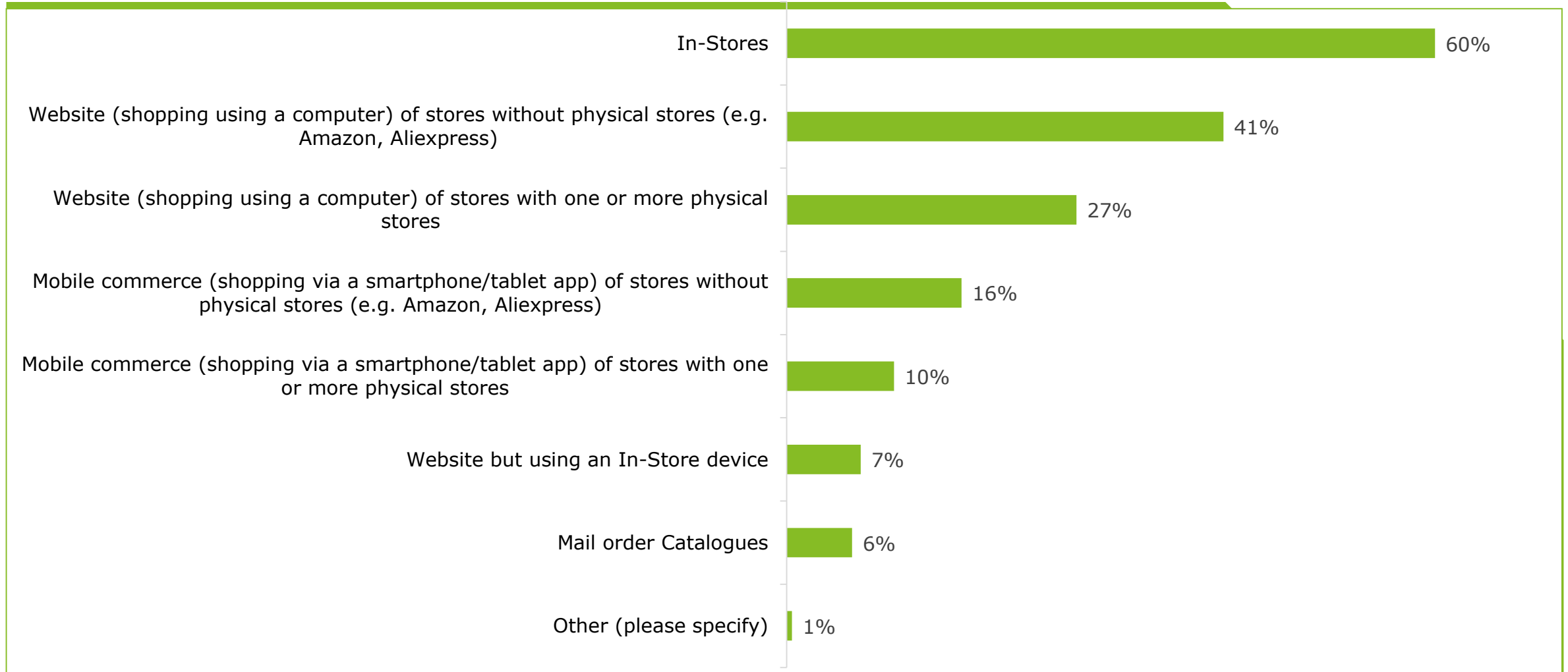
2

UK shoppers are the most active online compared to the European average, spending almost twice as much (£250 vs £134).

3

Online channel already represents a 32.7% of total Christmas spending in Europe, increasing ~5% from last year

# Channels used to buy gifts



# Where to buy gifts (physical stores)



- Top destinations for gifts bought in store are hypermarkets and department stores (high footfall destinations), with one in two consumers visiting these stores for their Christmas shopping.
- Next are the traditional shops with the specialty chains and the local shops, where one in three consumers shop at Christmas.
- Finally one in four choose to shop for their Christmas shopping in luxury stores and factory outlets.



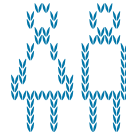
# Online shopping vs physical stores: Advantages

The ability to exchange/return products remains the main reason to make purchases in physical stores.

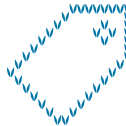
On the other side, having access to **reviews and opinions** from others is the main advantage for UK consumers when they buy online (83%)

Top 5 of each category

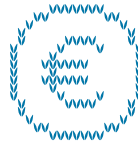
## Online



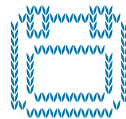
Access to other consumer reviews



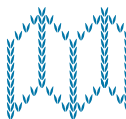
Home delivery



Prices can be compared easily



It's easy to search for and choose what I need

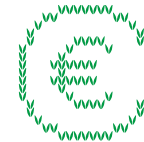


Delivery time of products (how fast do I receive the products at home)

## Offline



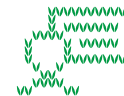
Exchange and return policies



I immediately get the products I purchased



Protection of my personal data



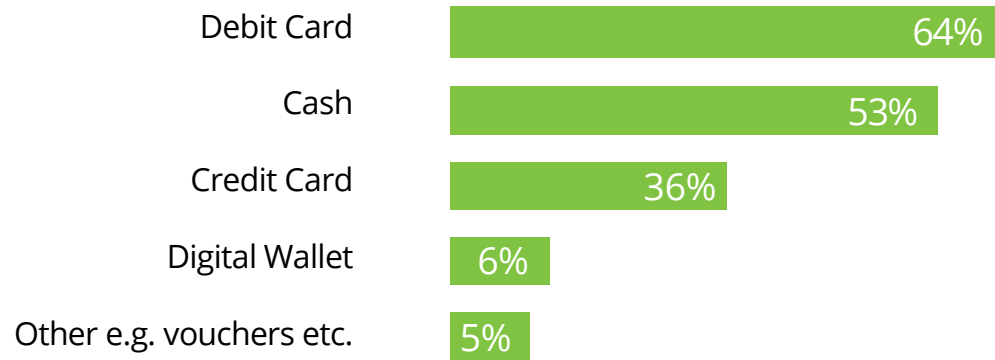
Competent and professional advice



After sale services (repair)

# Payment methods

## In-store



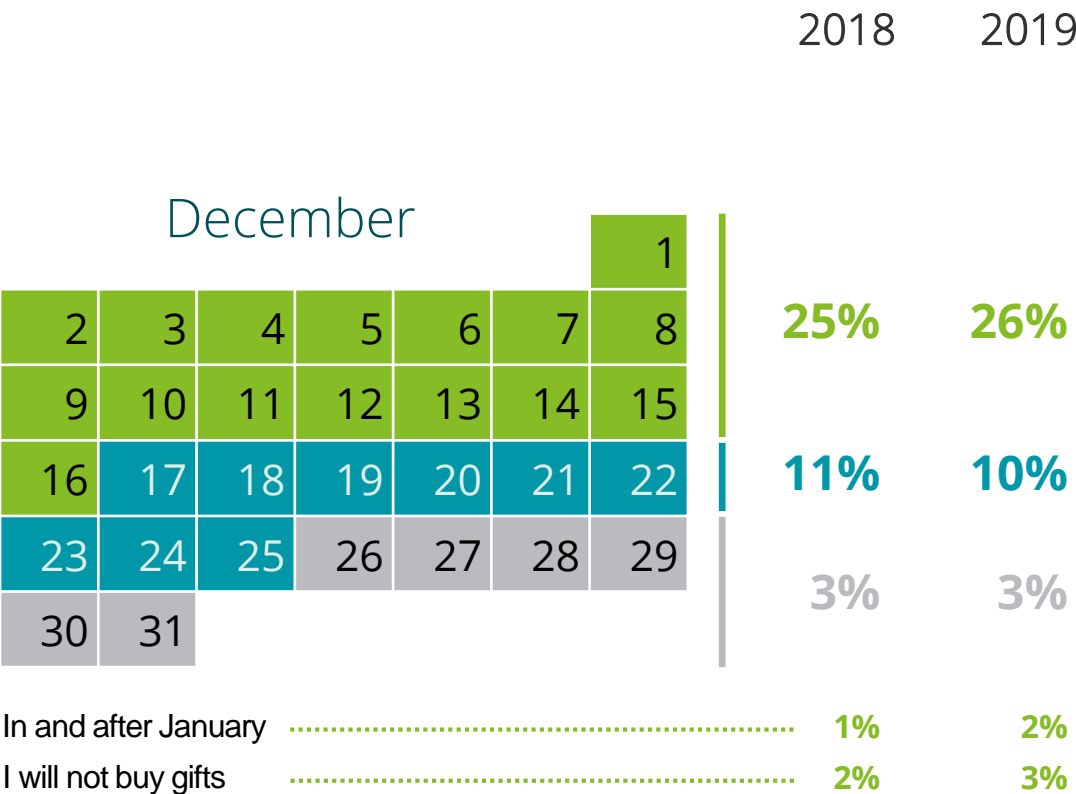
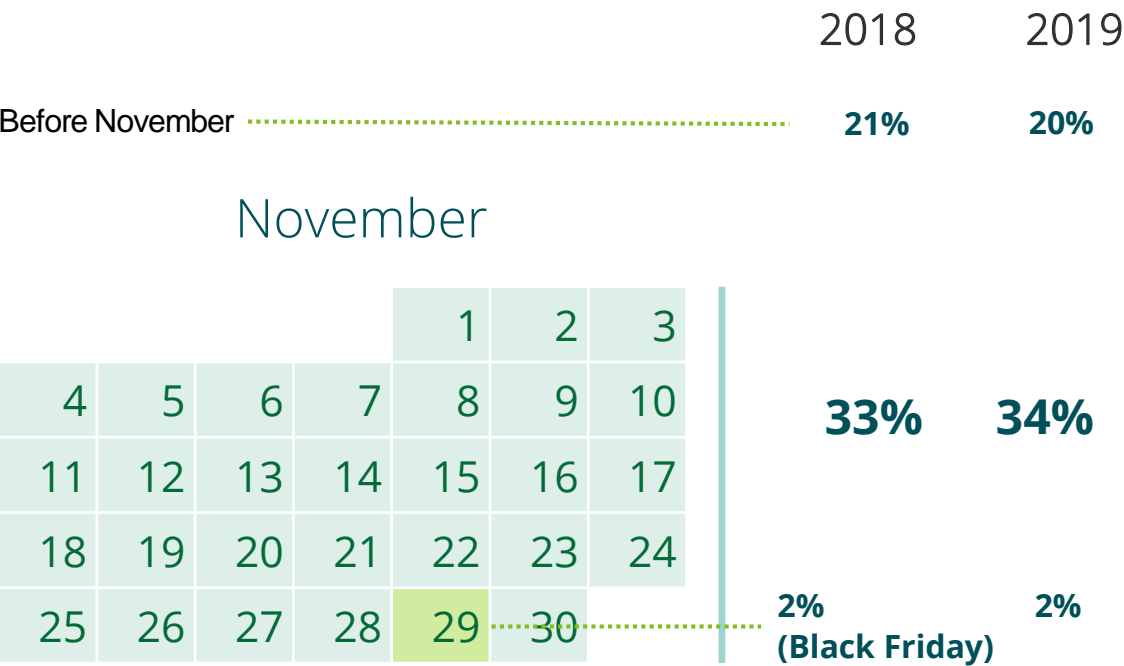
## Online



The **debit card** is the preferred payment method for consumers in the UK for all their transactions, both face-to-face and online purchases.

# UK Shopping calendar

These calendars forecast when UK consumers will make their Christmas gift purchases.



# Leader's comment



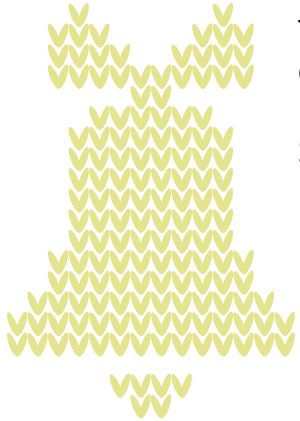
## IAN GEDDES

UK and North West Europe Leader, Retail

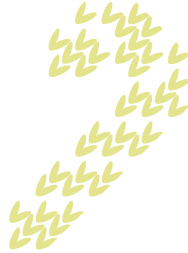
"UK consumers are entering the festive season in a cautious mood, with the average budget set to rise by a slender £9 compared to Christmas 2018. That said, economic fundamentals remain strong, with real wages high and unemployment low.

Additionally, many consumers are refusing to have Christmas spirits dampened by Brexit fatigue, in the context of ongoing delays. Our survey reveals 44% will in fact spend more to enjoy the festive period and 'avoid thinking about the macroeconomic environment'."

# Christmas Survey 2019 – The methodology



This is the **22nd edition** of the Deloitte Christmas Survey



This year, **8 countries participated**, all of them with a similar consumer behavior



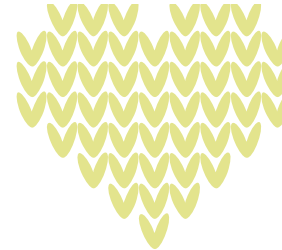
**Sociodemographic characteristics, personal interests, income level and consumer behaviour** were taken on account when selecting the survey population



Data was collected between **Sept 16 and Oct 11, 2019**



The data was obtained using online surveys to a sample of **7,190 people**, including 803 people in the UK.



The data have been obtained through a structured questionnaire on a **sample of the population aged 18 to 65 years** within a controlled panel.





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