Christmas Shopping Insights

2020

RESEARCH BASED ON 400+ RESPONDENTS

Intro

The holiday season is a particularly important time for retail shopping, with shoppers spending more during the Christmas holidays than they do throughout the rest of the year. This year, however, the challenges brought on by the coronavirus pandemic have undoubtedly upended the retail industry. Many stores have had to temporarily draw the curtains on their physical presence and shift their business online at some point in time, and this has led many to rethink the way they do business and interact with their customers.

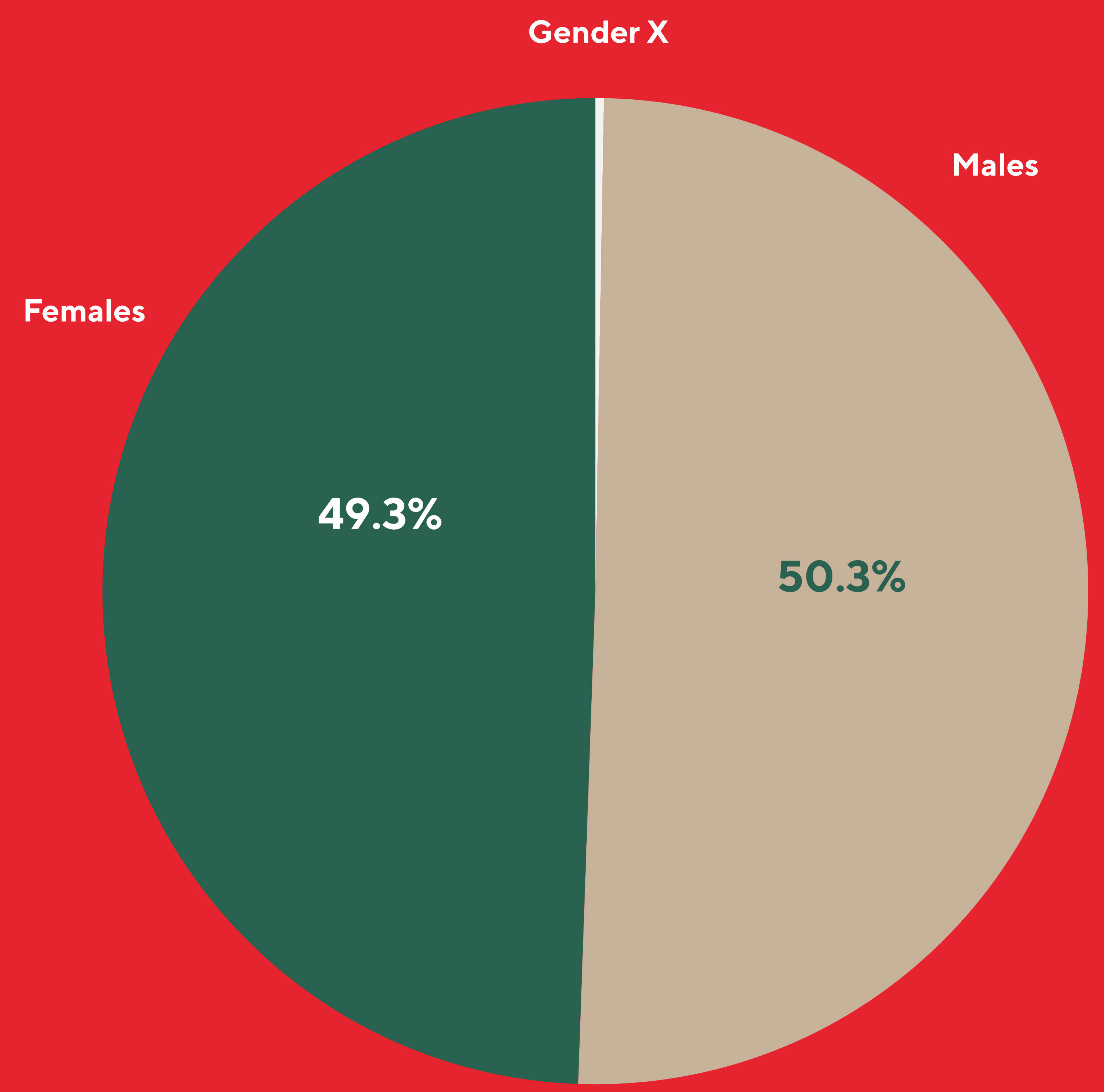
But, companies aren't the only ones who have had to make major adjustments. The pandemic has instilled new behaviours in consumers too and this has led to a major change in shopping trends. Consumers are now spending more and more time and money online, and Christmas shopping habits for 2020 are no exception. Drawing from research conducted recently by our team on Christmas shopping habits, in this report we explore how consumer behaviour has changed amid the coronavirus pandemic.

Demog-raphics matter

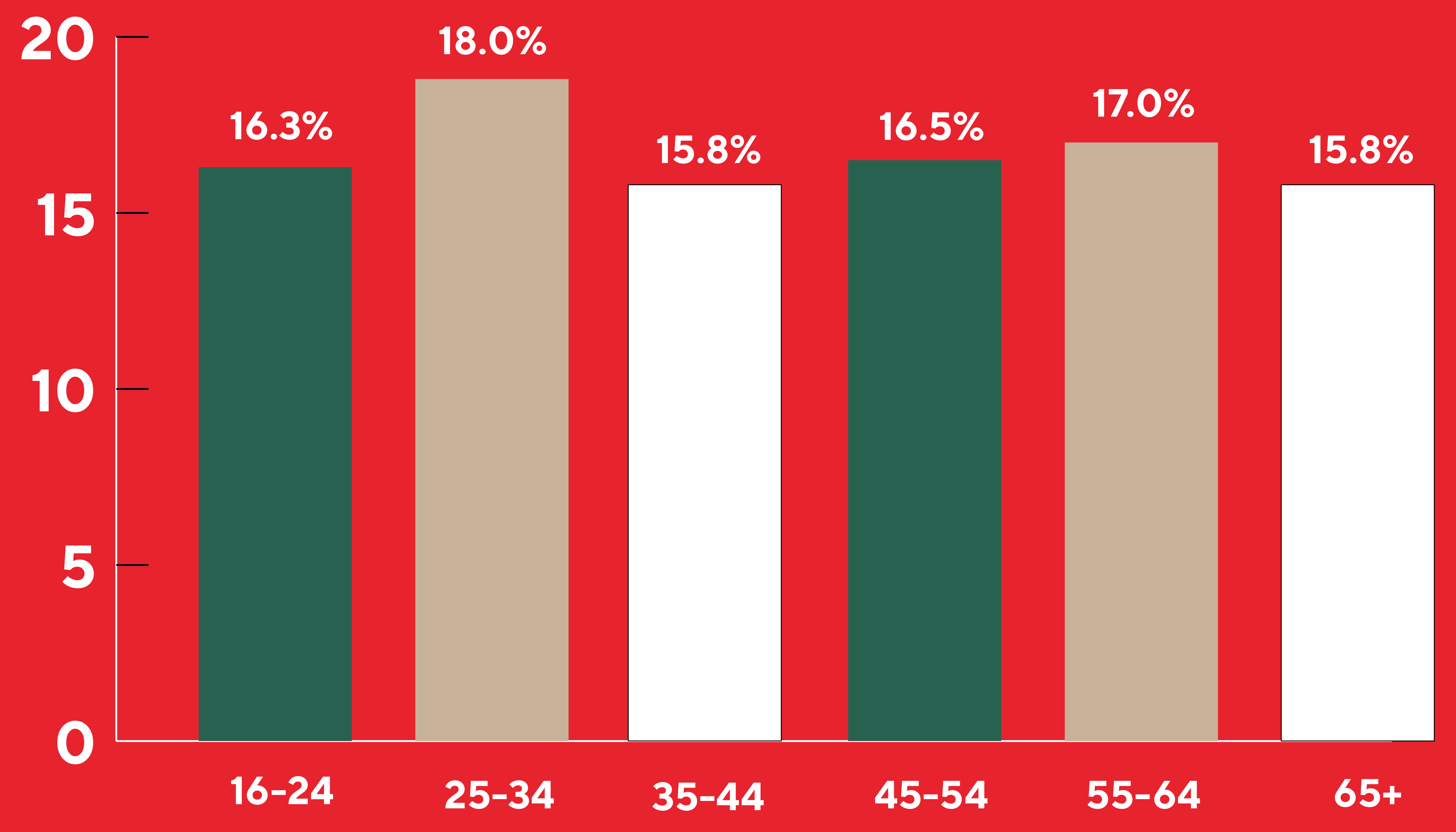
One size doesn´t fit all -- not in the world of research, anyways.

Different people or groups of people have different characteristics, personalities, attitudes, behaviours and habits, and the only way to clearly represent any one given population or a group within that population is by applying a scientific method of sampling.

Results can only ever truly be representative, and thus valid if the sample studied mirrors the targeted population down to the last detail, and that´s why our Christmas Shopping Insights study, like all our other research projects, is nationally representative through and through.


Gender X
Males
Females
49.3%
50.3%

Gender


20
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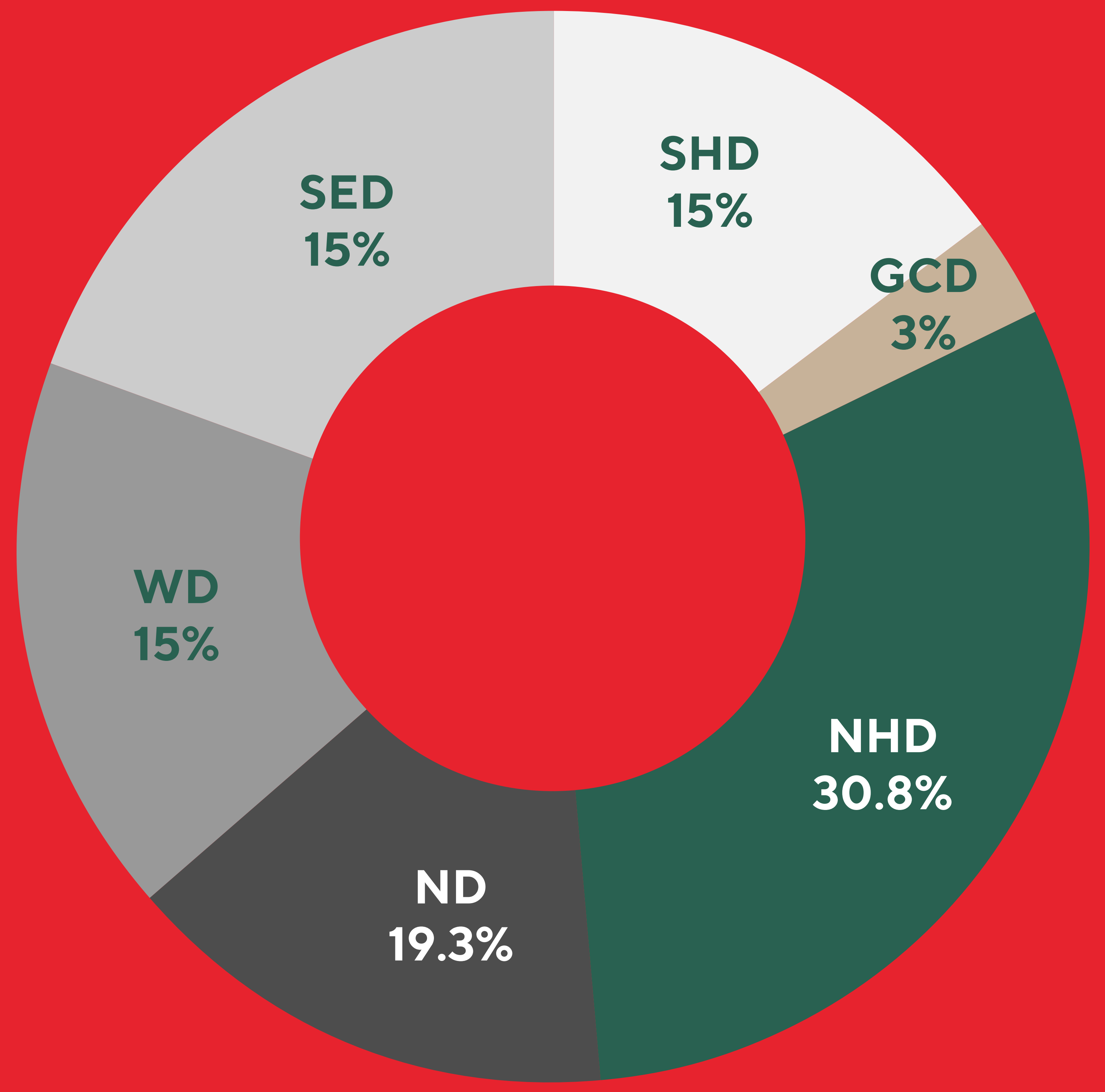
45-54
55-64
65+

Age



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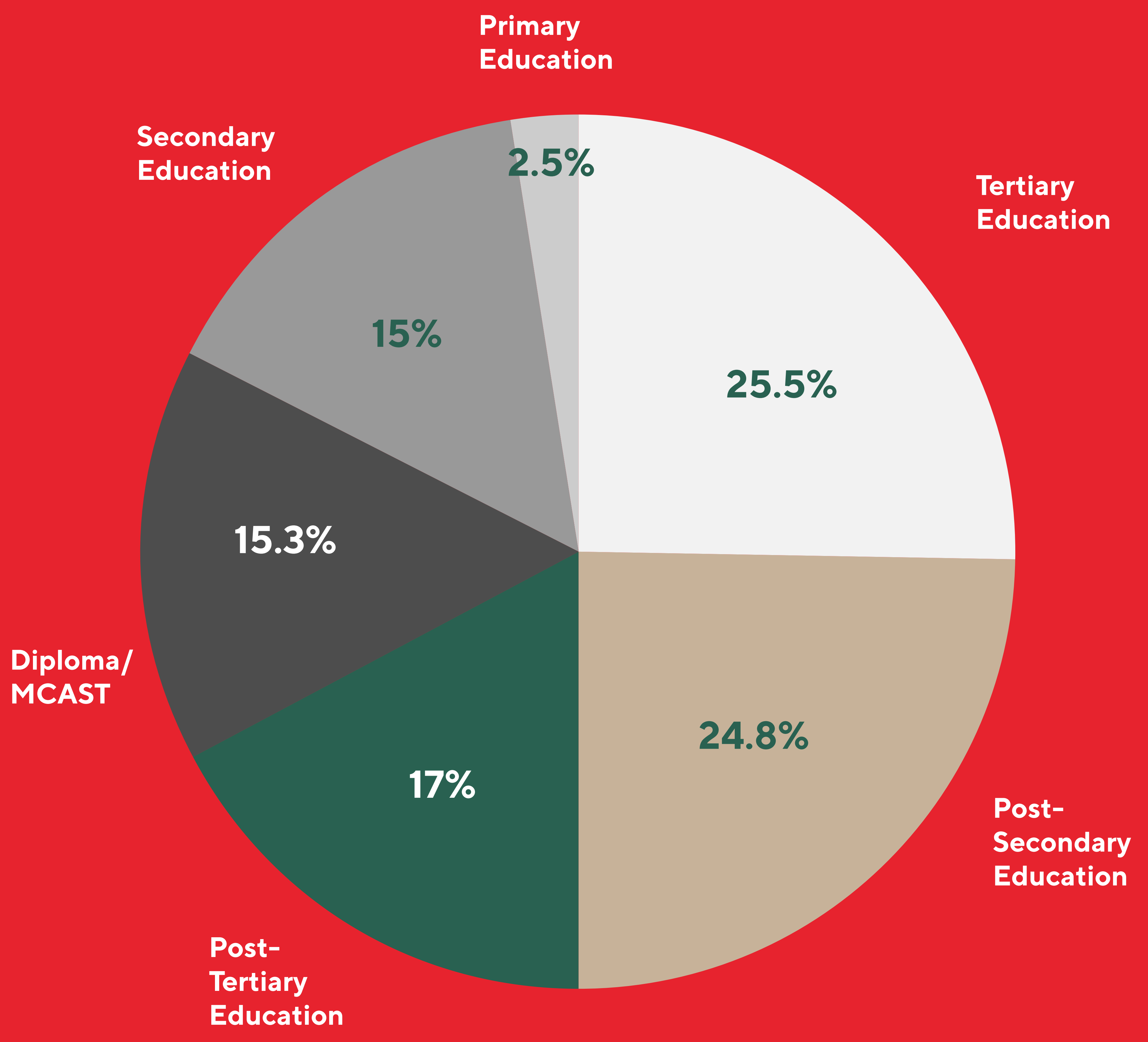

Education

Method-ology

In this report, we asked a representative sample of 400 Maltese nationals aged 16+ to discuss their shopping habits in an online survey.

To properly gauge shopping trends, a quota based on age and gender was implemented in order to ensure a spread of the general population.

We also looked at the relationship between the demographic characteristics of individuals and shopping habits. Here's what we found out...

CHRISTMAS SHOPPING INSIGHTS 2020

Habits in shopping times...

A comparison with previous years

When asked about the timing for Christmas shopping in 2020, no significant changes were found in the typical timings for holiday shopping when compared to previous years.

Similar to previous years, 58.1% would do their shopping between November and early December (62.6% claimed to have similar timings prior to 2020).

This year, however, the number of participants who claimed they will not be buying any presents have risen from 8.8% in previous years to 17.3% this year, a difference of 8.5% -- a number that when taken into context is somewhat significant.

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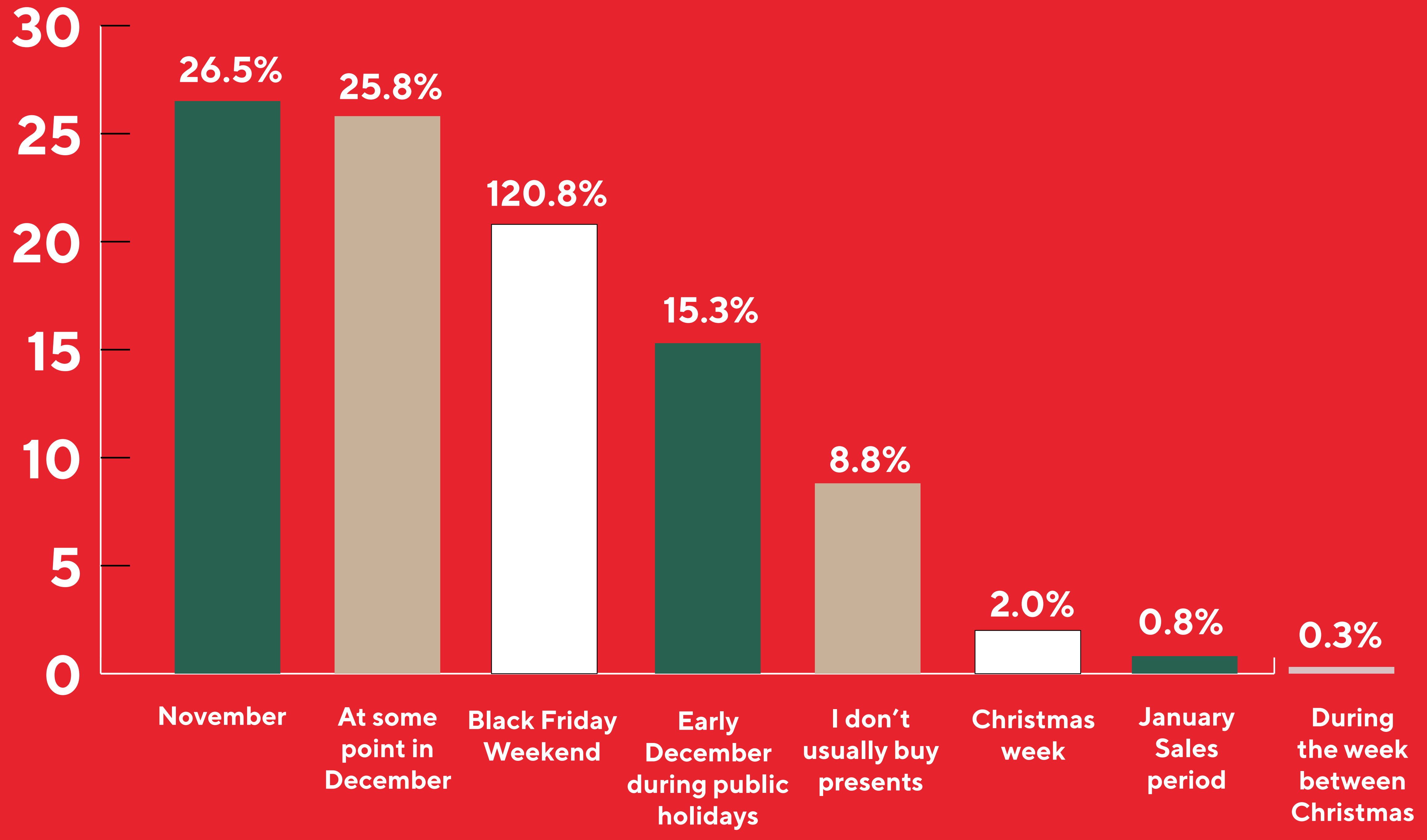
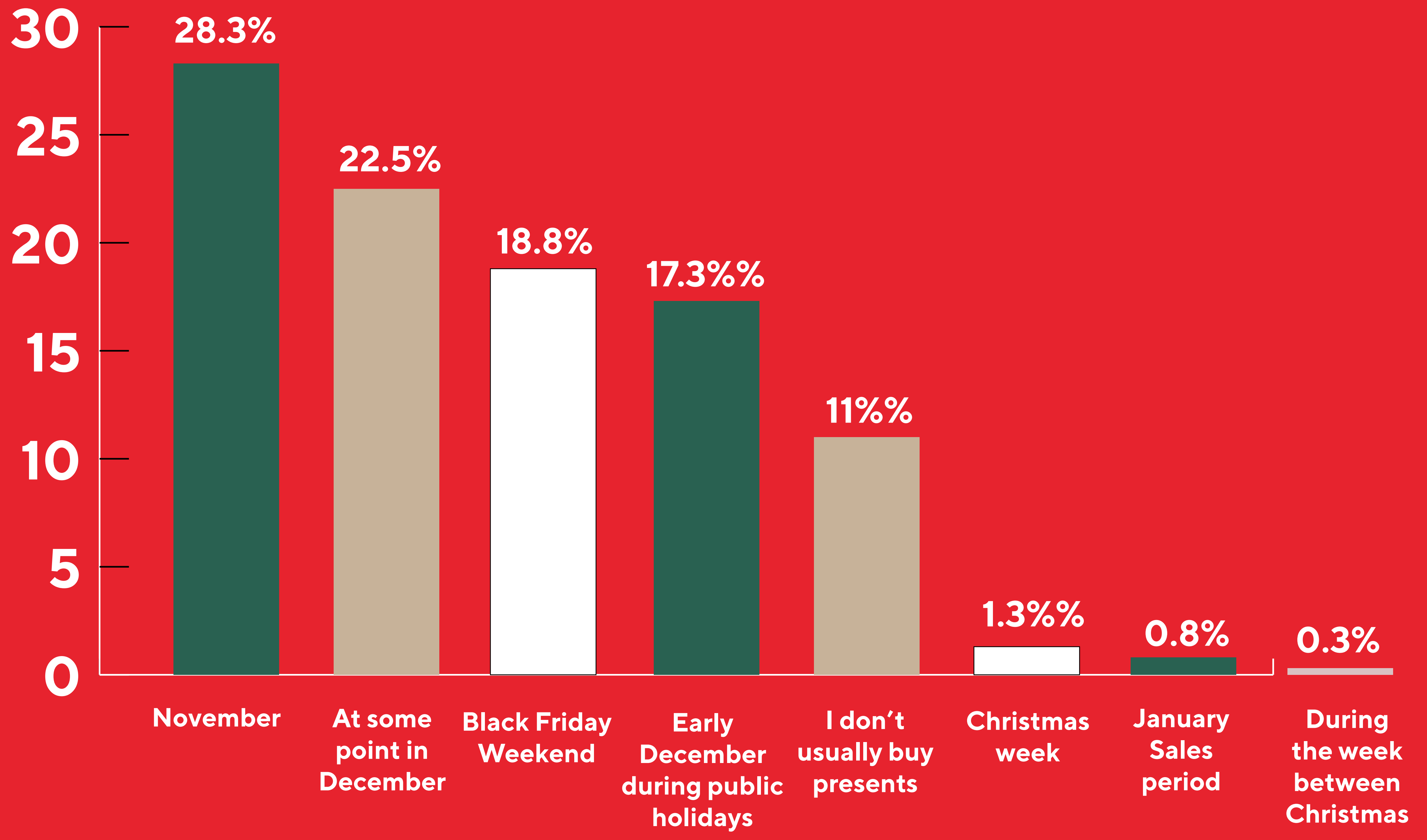
Typical Timing for Christmas Shopping



2020 Timing for Christmas Shopping



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Changes in Christmas spend...

A comparison with 2019

When asked how much they plan on spending on Christmas 2020 shopping, more than one-third (38.7%) of respondents said they planned on spending less than what they spent on Christmas shopping in 2019, 56.7% said they planned on spending just about the same amount of money as 2019, and 5.1% said they planned on spending more.

Amongst the most popular reasons as to why respondents planned on spending less this year were less social occasions (57.8%), lack of comfort going out (46.9%) and a change in one's income situation (45.3%).

Contrarily, amongst the most popular reasons as to why respondents planned on spending more in 2020 were a bigger family (64.7%) and more expensive gifts (11.8%). Other statements such as compensating for previous years and an increase in spend on decorations since they're spending more time at home received scores of 5.9% or lower.

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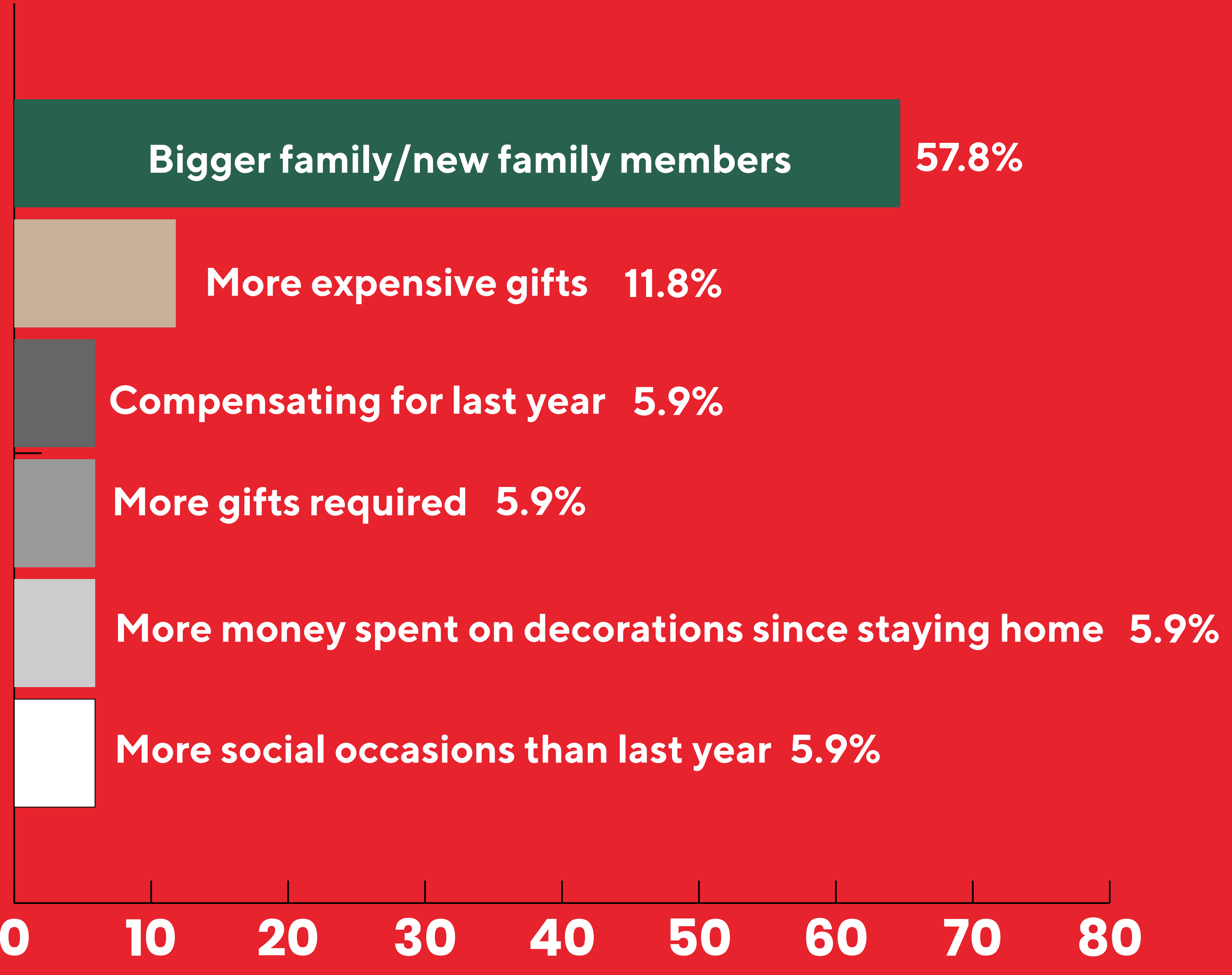
Reasons for spending less



Reasons for spending more

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A closer look at 2020 budgets...

When asked about the budgets allocated towards Christmas shopping, results revealed a dip in the amount of money that people were willing to spend on festive shopping this year. In fact, whilst the majority of respondents still planned to shop, some reported being more conscious in their spending.

Whilst 53.1% would normally spend below €300 that percentage has increased to 70.3% for 2020 Christmas shopping budgets.

Shopping methods Pre-2020

A look at preferred pre-Covid shopping methods...

In pre-Covid days, there were 84.6% of mentions indicating physical visits to outlets for Christmas shopping, 63.1% mentions for online stores and 41.7% for directly shopping through vendors' websites or Facebook pages

In terms of preferred methods of shopping 57.1% claimed that in-store visits would be their first preference for shopping although Generation Z and young Millennials still typically preferred to shop online via online stores, such as Ebay and Amazon.

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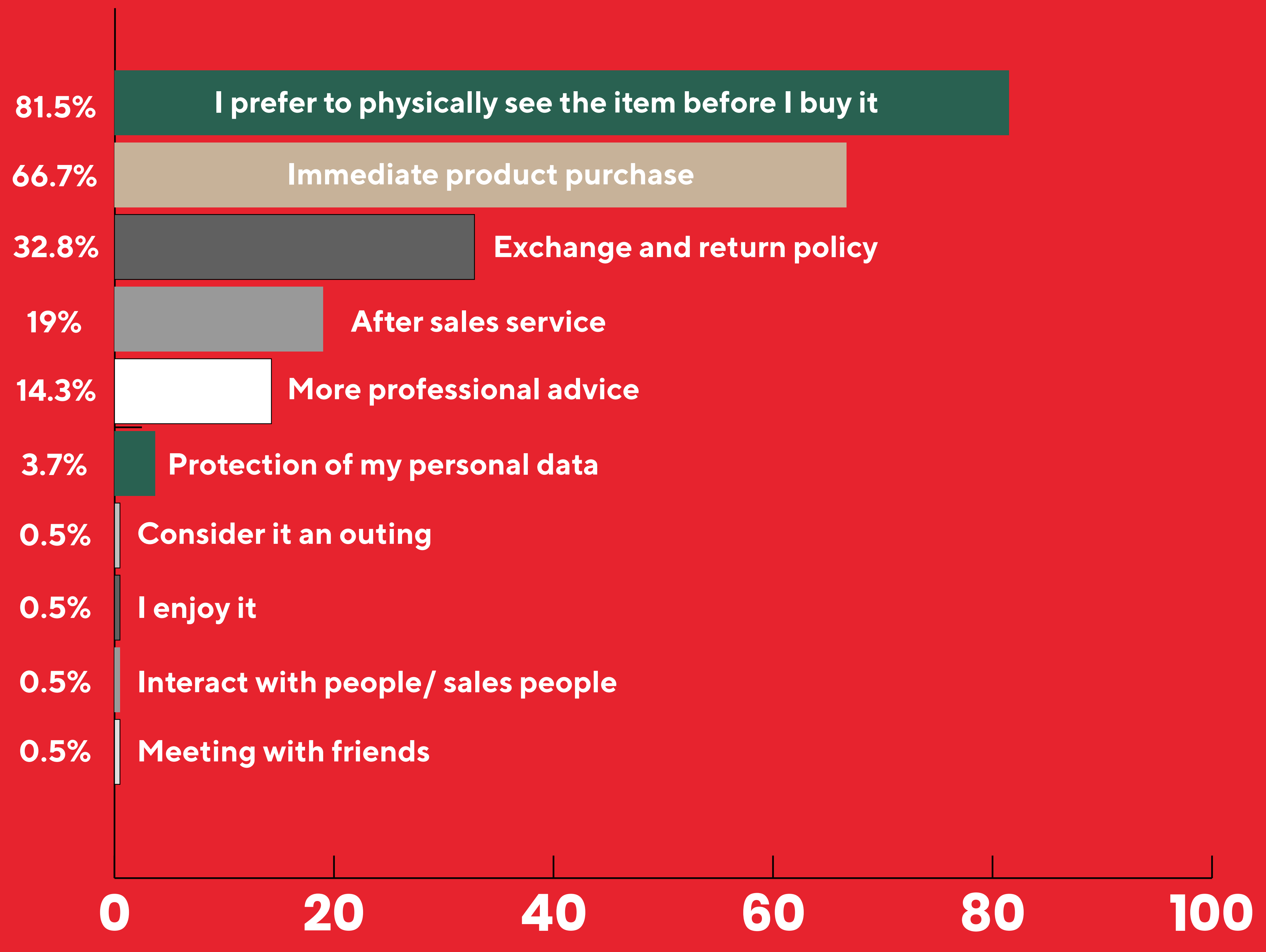
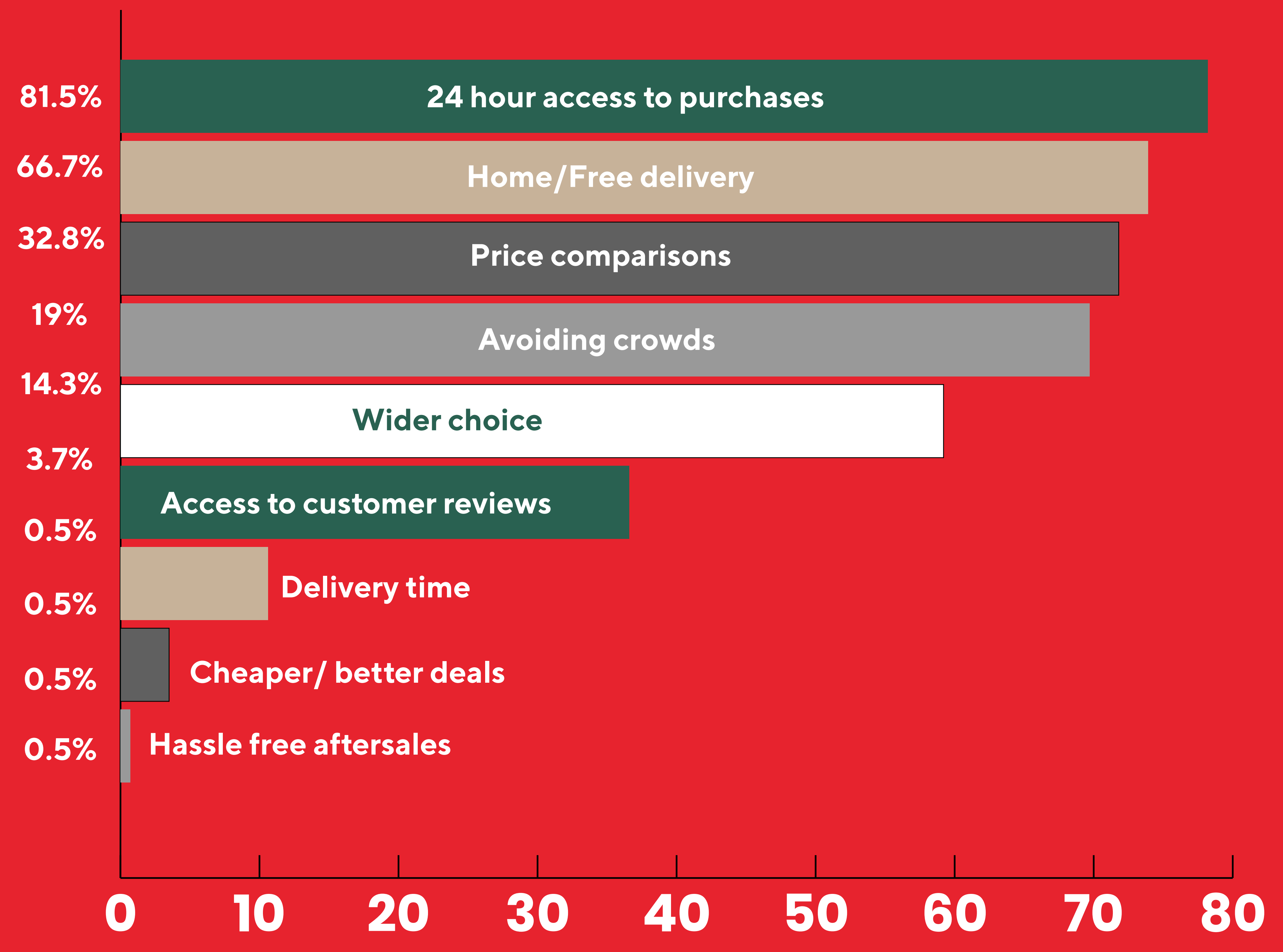
Reasons for preferring physical shops



Reasons for preferring online shopping



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Shopping methods 2020

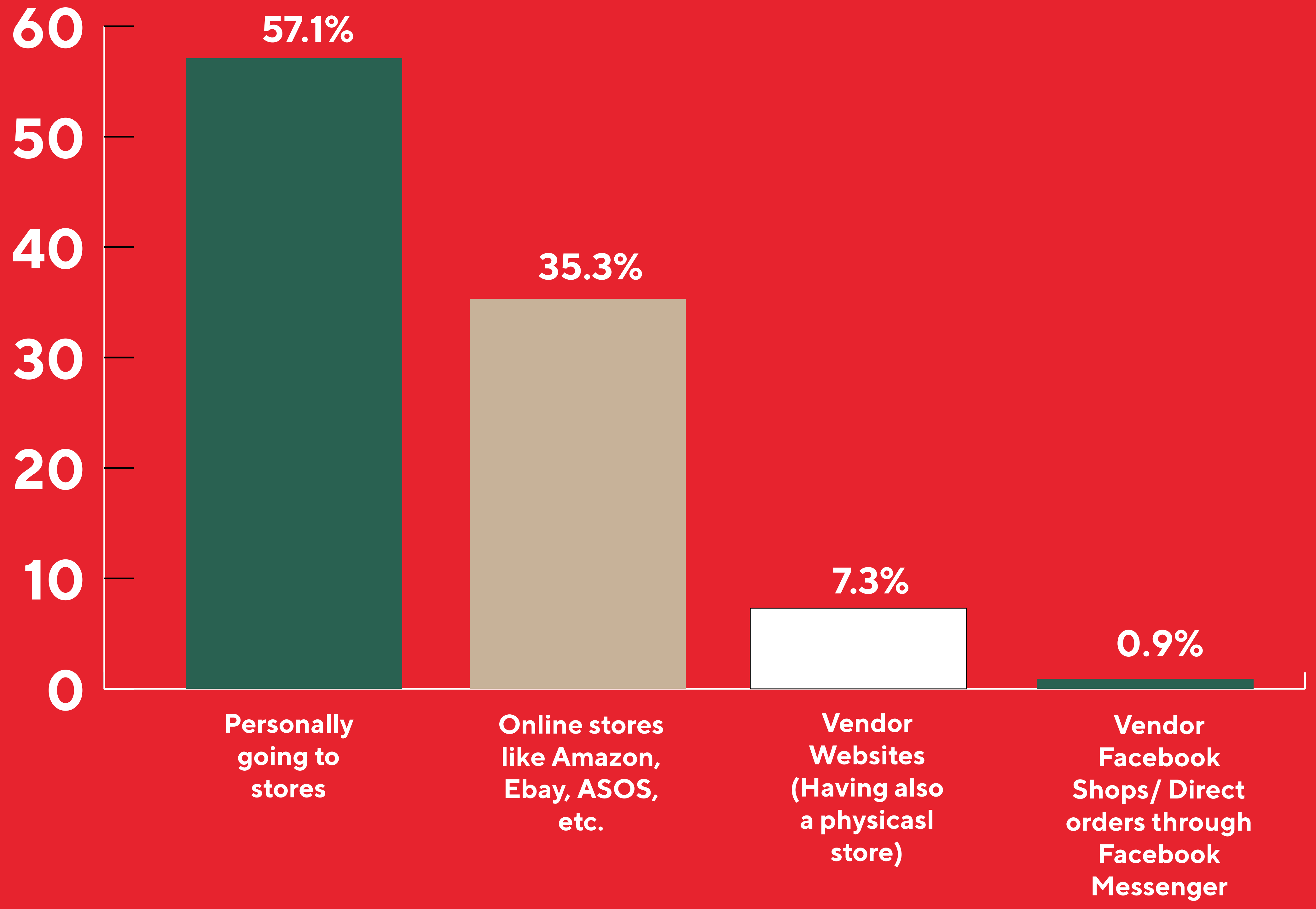
A look at preferred post-Covid shopping methods...

One look at preferred 2020 shopping methods, clearly illustrates how the tables have turned this year, with online store shopping (64%) surpassing in-store shopping (59.5%) amongst respondents.

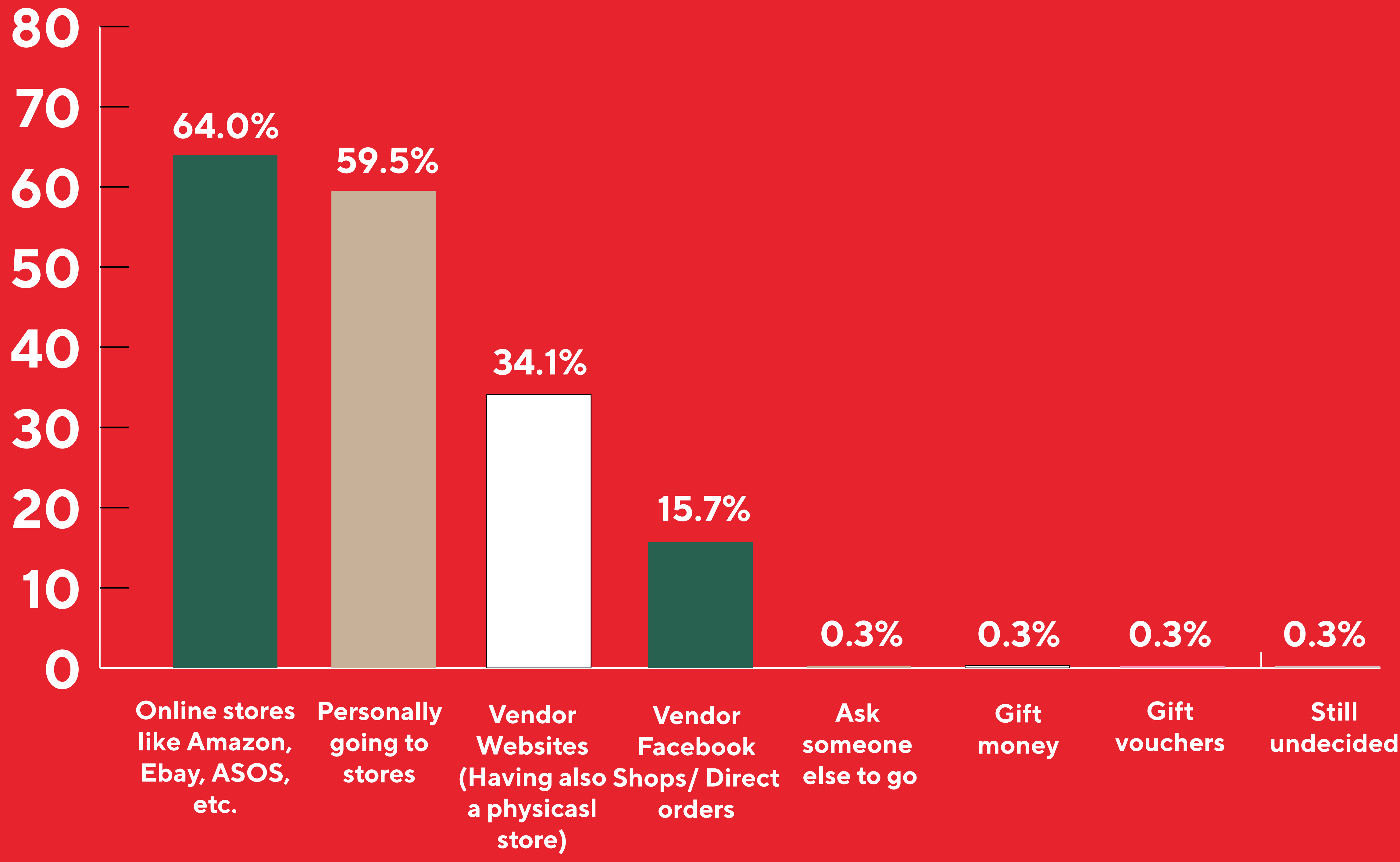
Use of other types of online shopping methods such as vendor websites and vendor Facebook shops/direct orders via Facebook messenger were also on the rise this year when compared to previous years with an increase in use of 26.8% and 14.8%, respectively.

A closer look at demographics once again revealed that the younger the age the more likely it was for respondents to engage in online shopping. Older audiences, particularly those aged 45-65+, on the other hand, still favoured in-store shopping (67.1%) over online shopping (50.3%), although the former was on the decline with a drop in 24.5% of mentions for in-store shopping for 2020 compared to previous years for this specific cohort.

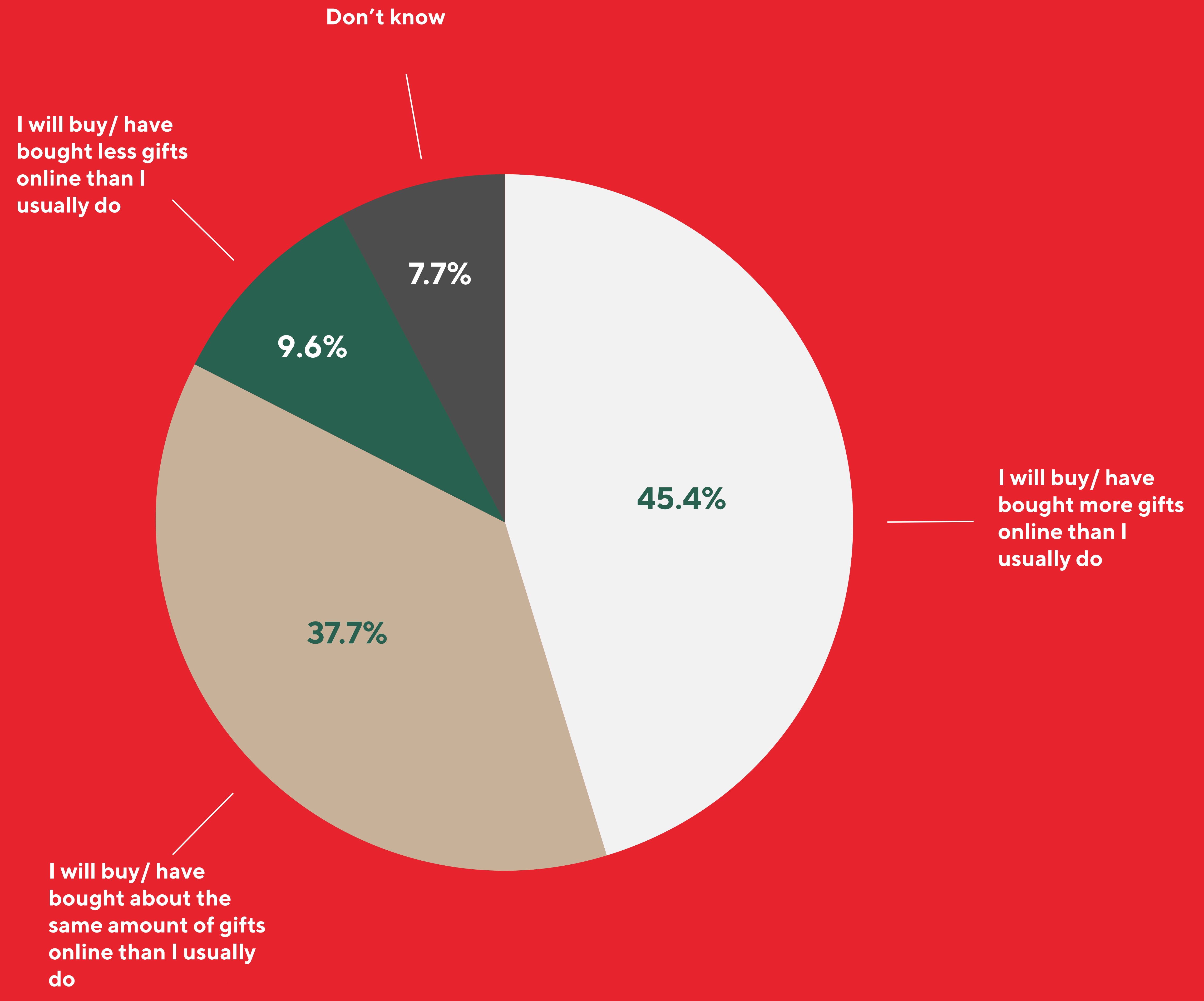
Typically Preferred Shopping Method



2020 Preferred Shopping Method

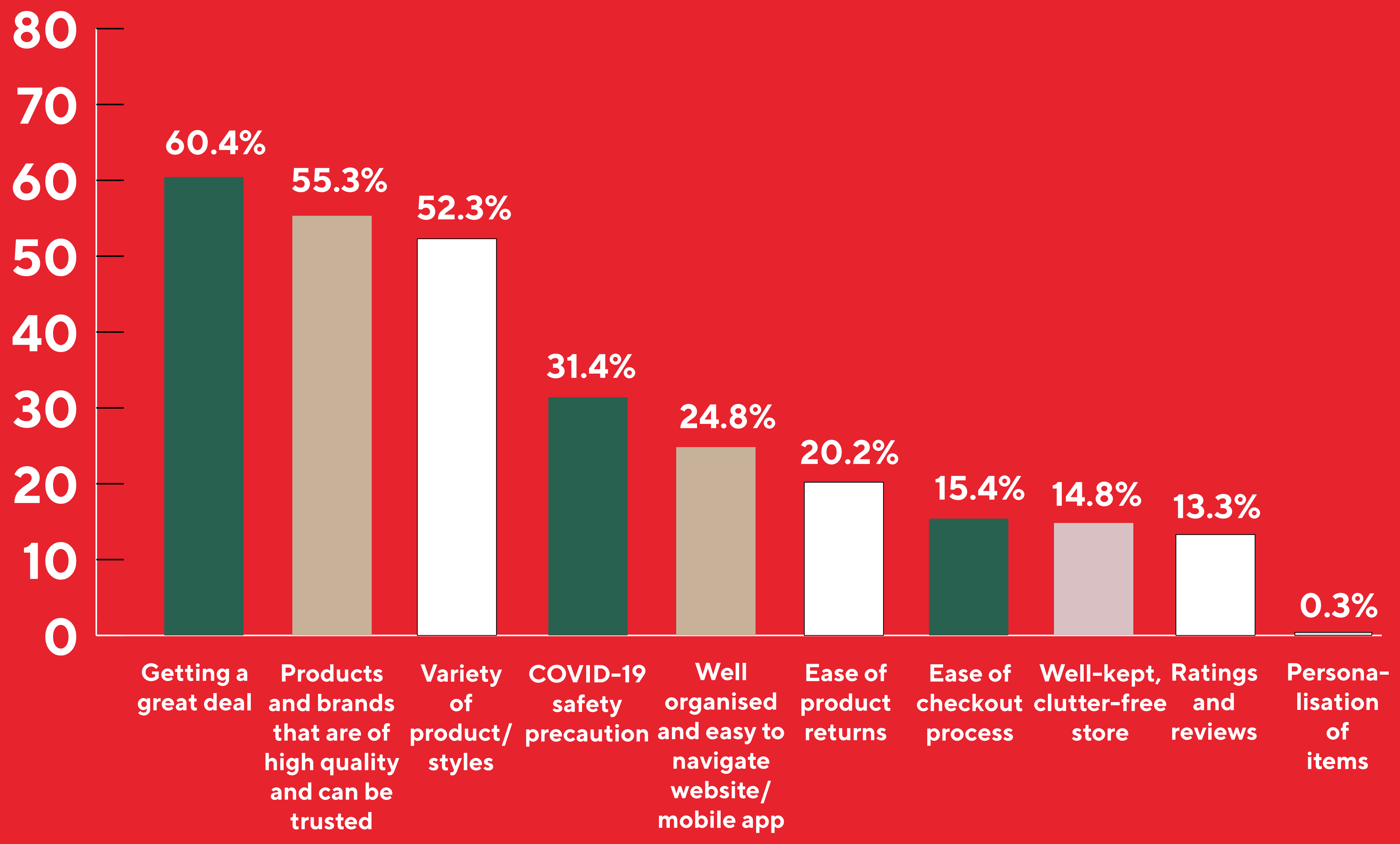


Changes in online shopping habits...



Important retailer attributes

Most Important Attributes When Selecting a Retailer



Impact of COVID-19 on shopping habits

When asked to rate a Likert scale of 1 to 5 about how likely it is that the pandemic affected their interest in physical visits to retail outlets (with a score of 5 indicating a great impact), participants gave a rating of 3.5.

What's interesting, is that albeit similar, the ratings differed by a few points across people of different demographic classifications. For instance, ratings amongst respondents who only received a primary level of education (4.4) or were aged 65+ (3.9) were higher than those of younger (3.5) and more educated (3.5) respondents. A closer look at these results, also revealed that females (3.7) were more likely than males (3.4) to be affected by the pandemic when it came to physically visiting an outlet.

When asked about what stopped them from physically going to stores, the most popular reasons as to why people refrained from visiting outlets were a high risk of infection (84.5%), a lack of proper adherence to COVID-19 guidelines by stores (44.7), vulnerable family members (32%), and self vulnerability (19.9%), with the rest of the statements such as quarantining and not meeting with people receiving a score of 0.6% or lower.

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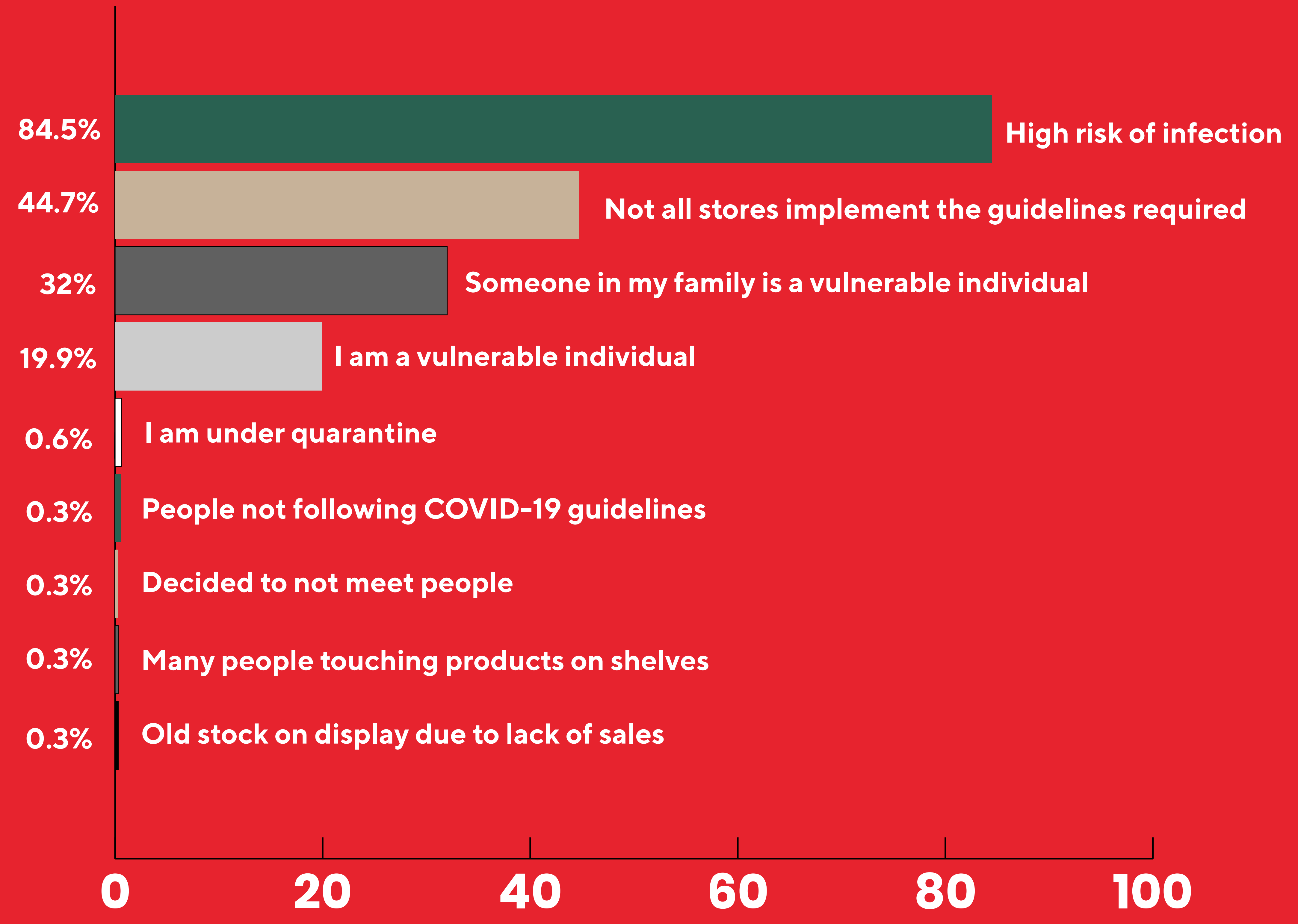
3.5

Mean Score

Effect of pandemic on physically visiting retail outlets



Barriers to going to a physical store

Preferred gifts...

When asked to rate certain gifts in terms of preference -- clothes/shoes (41.8%), money (28.5%) and technology (26.6%) were among the highest options rated, followed by Homeware (21.9%), open gift vouchers (21.7%) and books (19.3%), amongst others.

Among the least preferred gift options were soft toys, model contsruction toys, video games, gift vouchers from specific outlets, educational toys and board games.

Once again, when looking at demographics we found that gift preferences differed across different age groups, genders and education levels.

For instance, technology was among the top 3 preferred gifts across younger respondents, males and those with higher levels of education, but significantly less popular among respondents aged 55+, females and people with lower levels of education.

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