

Holiday Expectations Survey Research

Survey Research Results



Sitecore conducted survey research among consumers ahead of the 2022 holiday season.

About the survey

- 1,034 German residents completed a 10-minute survey
- Survey was conducted Aug 30-31st, 2022
- Quotas were set to balance participants by age and gender

- Participants were recruited from an actively managed online panel
- Participants were incented using rewards points offered by their online panel

- Additional results can be found at <https://portal.Advanis.net/sc>
- The survey was conducted in five countries (UK, US, France, Germany, Australia)



Advanis is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. This research was sponsored by Sitecore and conducted by Advanis. For information about data collection, please contact *Lori Reiser, CAIP* (lori_reiser@advanis.net 519.340.0125)



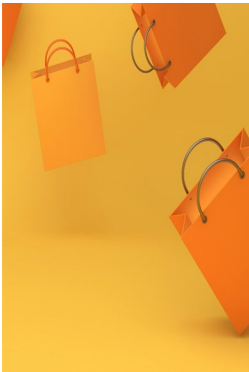
German Shoppers are Budgeting for the Holiday Season

Affordability is a concern for a lot of Germans approaching the holiday season – 1 in 4 plan to cut back on personal expenses to afford the holidays, and 1 in 3 parents plan to only buy gifts for children. 32 % of Germans also stated that the end of the 9€ ticket will negatively affect their holiday budgets.



Omnichannel Christmas shopping with more online

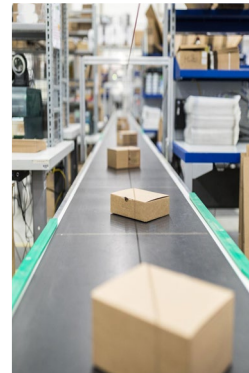
The top 3 reasons for choosing online shopping: shopping online is quick and easy (65%), the online experience is convenient (60%), they want to avoid crowds (45%).



More plan to shop Black Friday compared to 2021

48% of Germans are planning to shop on Black Friday this year - 11% more than last year. Most German consumers are attracted by the possibility of better deals and prices for gifts (76%).

Black Friday will be predominately an online shopping occasion, with 92% shopping online, and 20% shopping in person (12% of these doing both).



The pull to shop is strong - even when working

50% of workers have done holiday shopping during the workday, while 43% that have shopped at work have done so in a secret browser. And while gifts still play a big role in the celebrations, half of German consumers also say that spending more time with family is more important than money on gifts.

50%

of workers have done Christmas shopping during the workday with



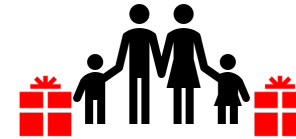
43%

of those opening a secret browser to do so



38%

of parents: very likely to buy gifts for kids only



35%

of Gen Z will regift a present to save on costs



Despite eased restrictions on in-person shopping, online shopping continues to dominate with only **21%** planning to shop in store more than online



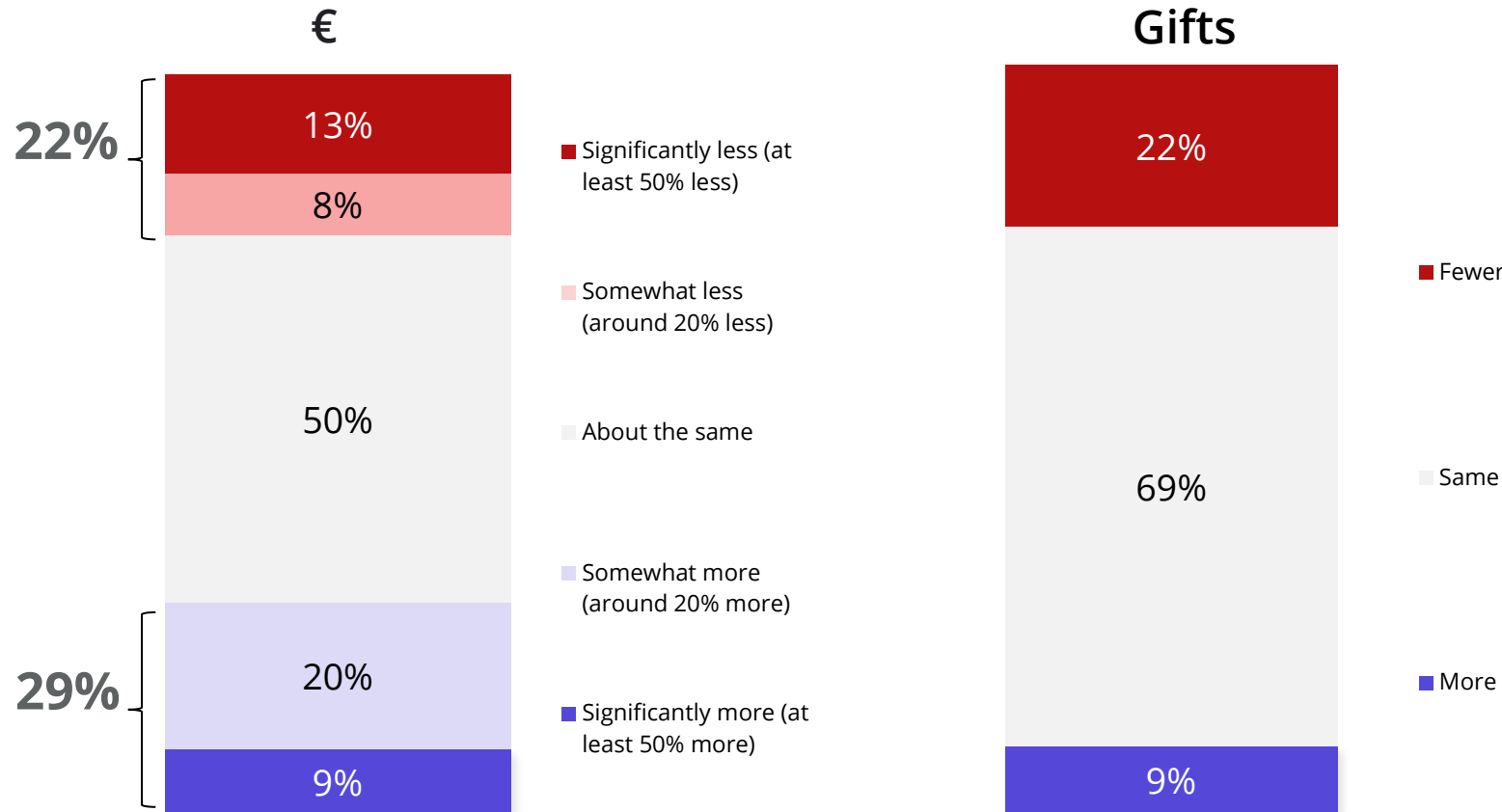
Weihnachtsplätzen and gifts, particularly for kids, are considered 'must have' Christmas experiences. Spending time with family is also very important to half of Germans.

Budgeting



Planned Spending & Number of Gifts

1 in 4 German shoppers expect to spend more this year and for those with a higher income (over €75k) this increased to 38%. While German shoppers expected to spend more money this is not reflected in an increase in the number of gifts they plan to purchase.



Those with €75k or higher income are planning to spend more this year:

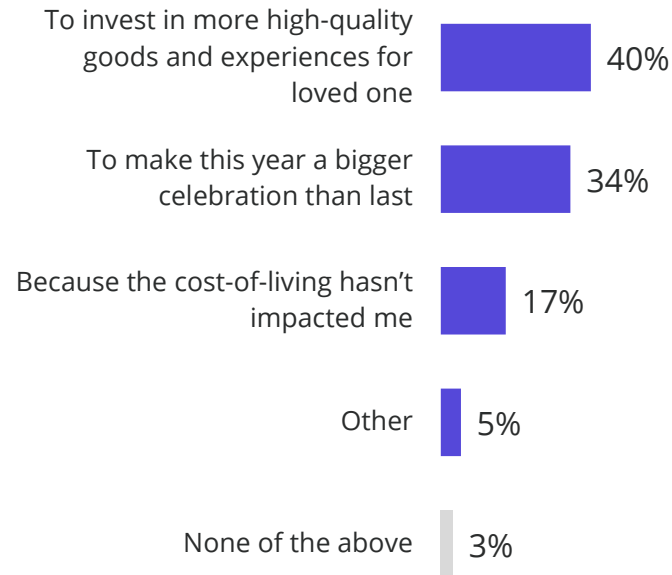
- 38% will spend more
- 15% will buy more gifts

Why change spending this Holiday season?

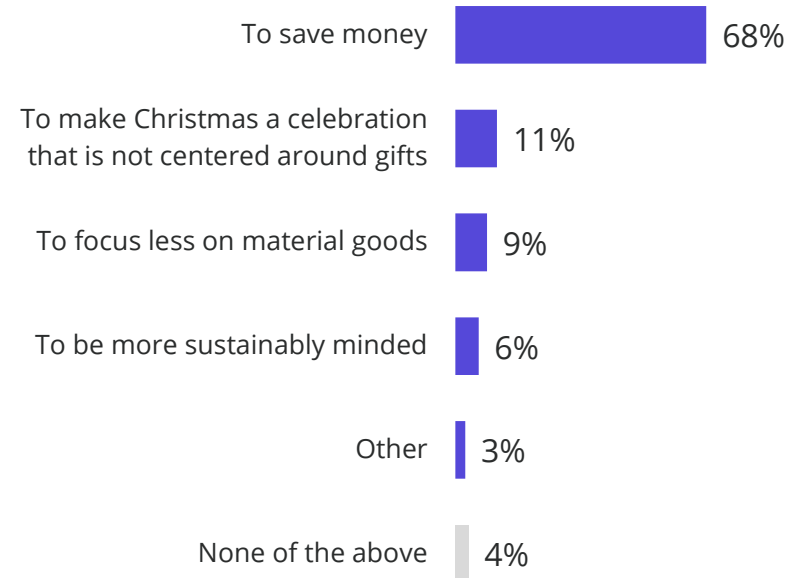


Those who plan on purchasing more gifts want to invest in higher quality gifts and make this a bigger celebration than last year, while saving money is the most common reason to purchase fewer gifts.

More Gifts (9%)



Fewer Gifts (22%)

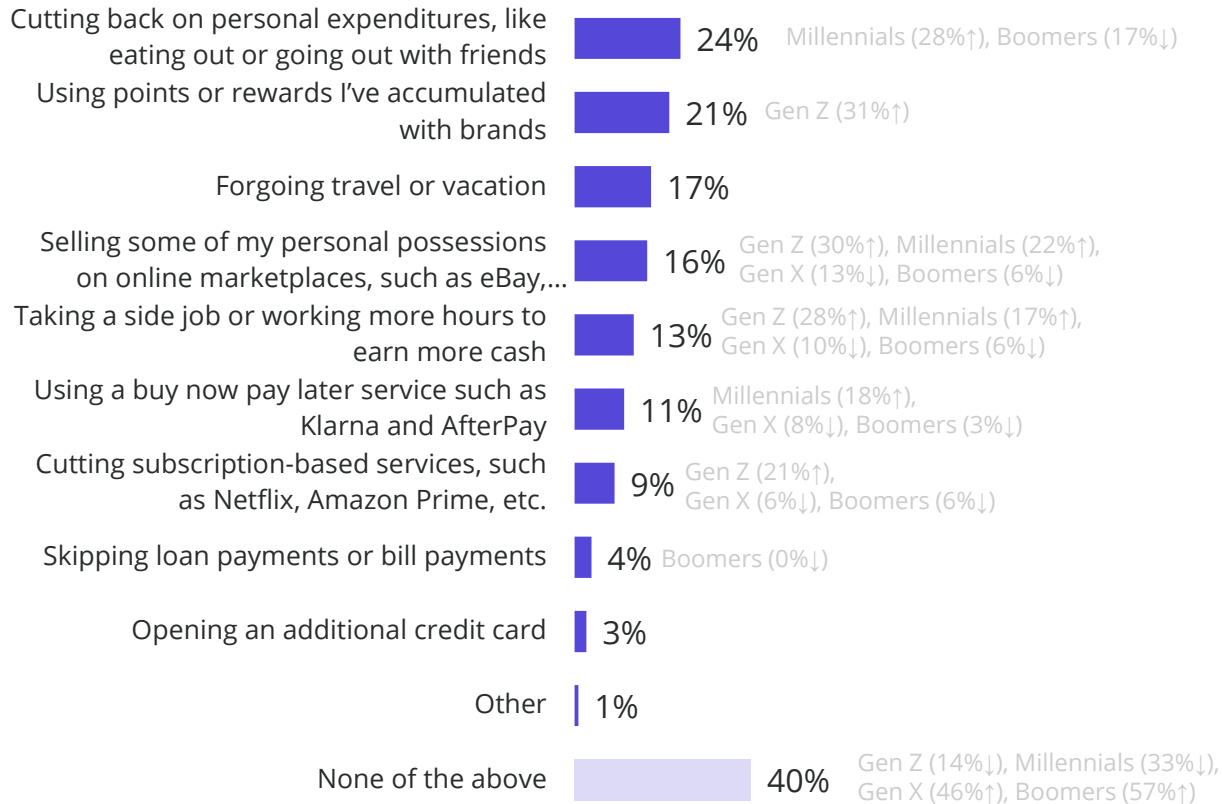


q29b - If more, what is the main reason? Base: Germany (93)
q29a - If fewer, what is the main reason? Base: Germany (223)

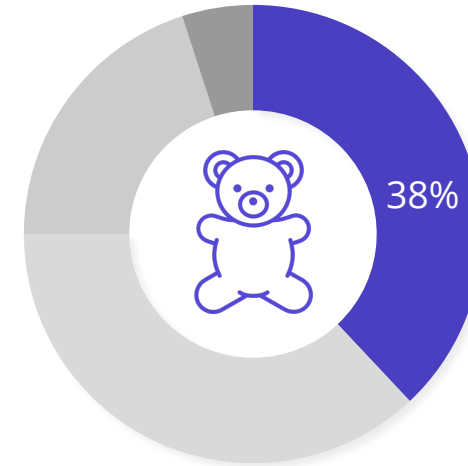
Ways to Afford the Holidays

1 in 4 plan to cut back on personal expenses to afford the holidays.

Gen Z and Millennials are more likely to be looking for ways to make this season more affordable compared to Boomers.



Gifts just for the kids



In fact, 38% of parents say they are very likely to only buy gifts for the kids this year.

- Very likely
- Somewhat likely
- Unlikely
- Very unlikely

Re-gifting



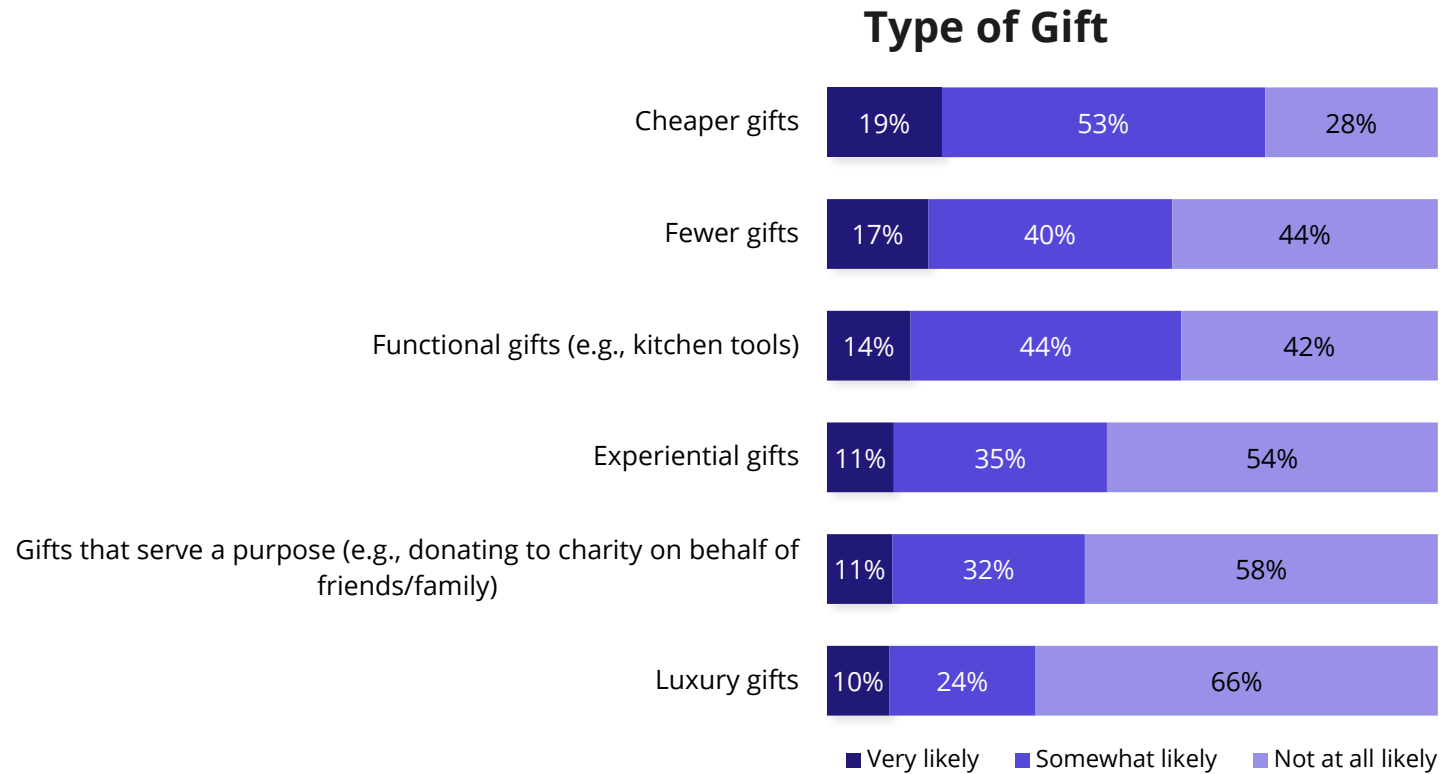
1 in 5 will regift a present this year to save on costs (35% of Gen Z and 29% of Millennials).

q4 - Will you be looking at any alternative ways to be able to afford spending more during this year's holiday season? Base: Germany (1,034)

q28 - How likely are you to buy gifts just for the kids this year? Base: Germany; has kids under 18 at home (351)

q30 - Do you plan to re-gift presents this year to save on costs? Base: Germany (1,034)

There is a modest likelihood that 2022 will be the year of cheaper, fewer, functional gifts.

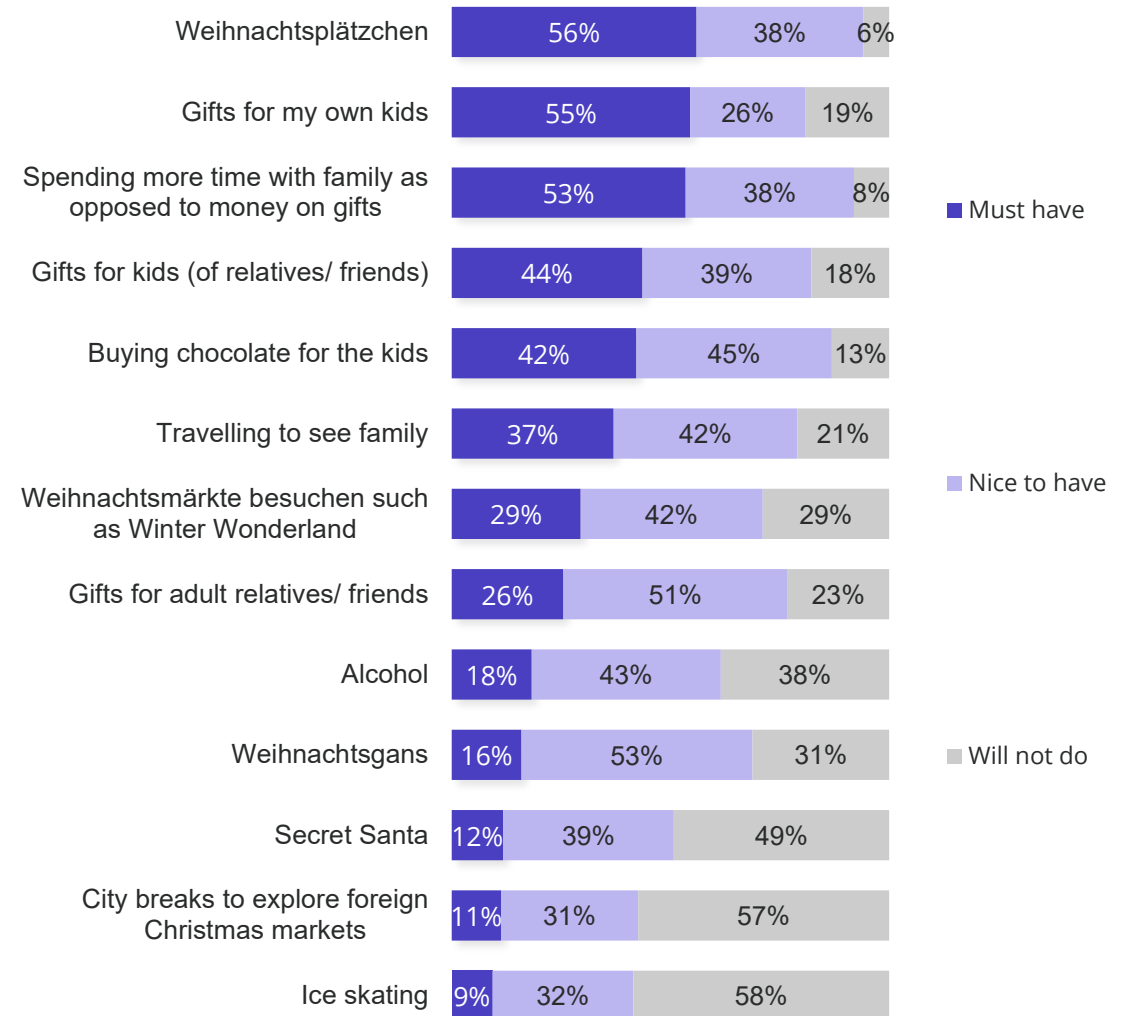


q9 - Will the type of gifts you plan to purchase this year change compared to 2021? Please rate by likelihood Base: Germany (974, 977, 943, 895, 907, 843)

Priorities for the Christmas Season

Having Christmas cookies (Weihnachtsplätzchen) and gifts, particularly for kids, are must haves for most families this Christmas.

Over half of German consumers also say that spending more time with family is more important than money on gifts.





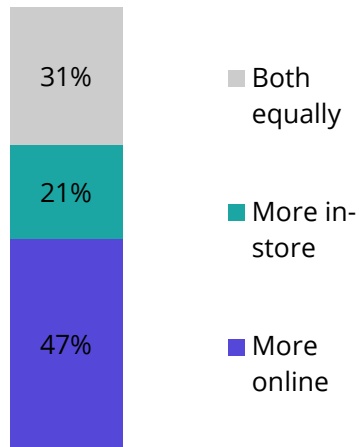
Online Shopping



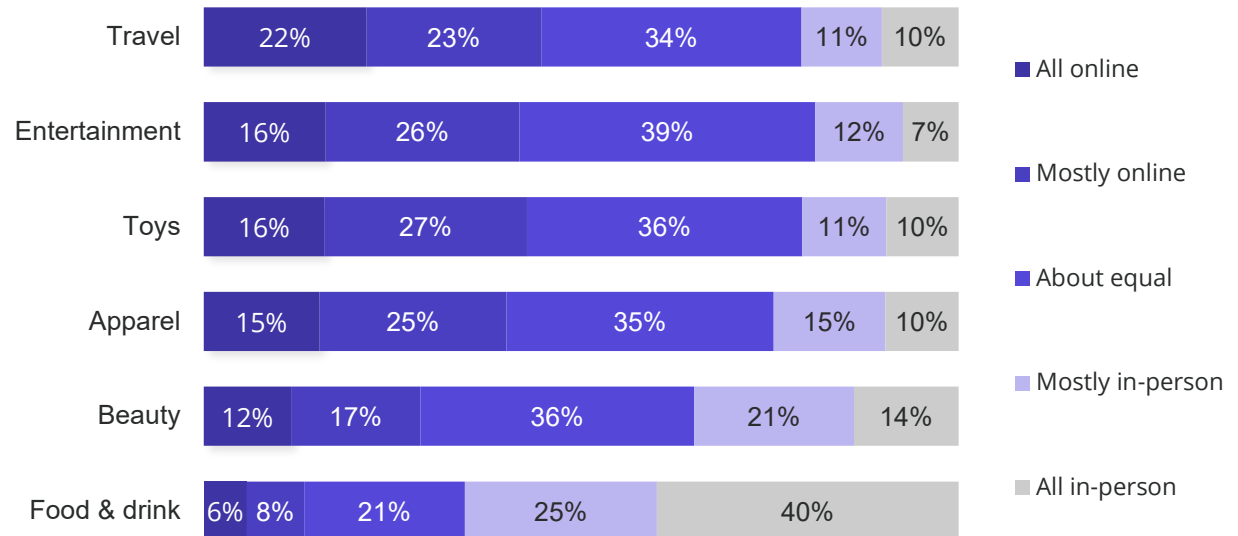
Despite eased restrictions on in-person shopping, online shopping continues to be a popular channel, with nearly half saying that they will do more shopping online vs. in-person.

Younger generations are the most likely to say that most of their shopping will be online compared to the older generations.

Where Planning to Shop



Categories of Holiday Shopping



q20 - Where do you plan to shop more this holiday season – in-store or online? Base: Germany (1,034)

q24 - Thinking specifically about different categories of holiday shopping, how much do you plan to do online this year? [e2 from 2021 Consumer Survey] Base: Germany (1,034)

Online vs. In Person

Quick, easy, and convenient shopping are reasons that all ages prefer to shop online, with convenient shopping being the top reason for Boomers (73%). The expense of driving is particularly important for Gen Z with 44% indicating its importance.



Even more than in 2021, early discounts and deals are highly valued by German shoppers (77% who say this is a top priority, compared to 62% in 2021), whereas reminders and suggestion to plan ahead, as well as exclusive, limited edition products are less important than in 2021.

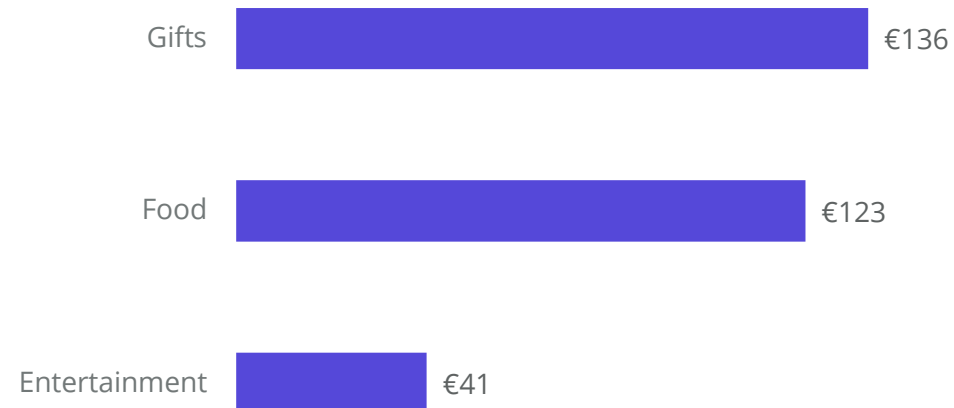
Priorities for Purchases



In our €300 spending scenario, gifts and food represent the highest amount of the spend, while entertainment is the lowest spend.

Boomers are more likely to spend more on food and less on entertainment compared to the younger generations.

How would you spend a €300 holiday budget



Black Friday

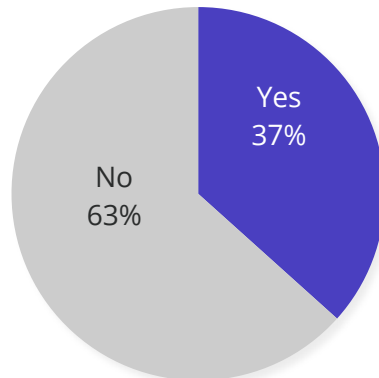


Black Friday

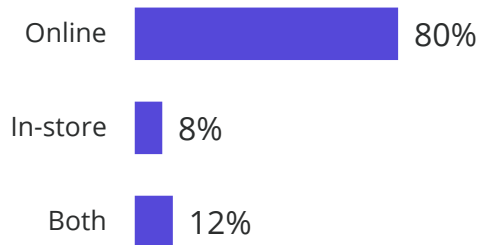
Just under 4 in 10 said that they shopped on Black Friday last year. Nearly half plan to do so this year. Both last year and this year Black Friday shopping is dominated by the younger generations. Nearly all the Black Friday shopping is expected to be online.

The top reason for shopping on Black Friday relates to getting good deals (where 84% of Gen Z think Black Friday offers better deals but only 68% of Gen X). Along with perceptions of poor deals, out of stocks are a reason to avoid Black Friday shopping.

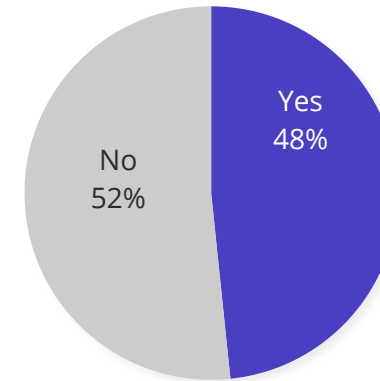
Shopped on Black Friday 2021



Shopping Where?



Planning to Shop on Black Friday 2022



- Black Friday no longer offers good deals (24%)
- I prefer shopping for gifts closer to Christmas (13%)
- Items sell out too quickly on Black Friday/ aren't accessible for me to purchase (12%)

- Black Friday offers better deals and prices for buying gifts (76%)
- It will help me avoid the rush around last-minute holiday shopping (34%)
- Black Friday shopping is fun (31%)

q18 - Did you shop for gifts on Black Friday in 2021? Base: Germany (1,034)

q19 - Are you planning to shop for gifts on Black Friday this year? Base: Germany (1,034)

q19a - Where are you planning to shop on Black Friday? Base: Germany who plan to shop (500)

q19b - Why are you planning to shop on Black Friday? Germany who plan to shop (500)

q19c - Why are you not planning to shop on Black Friday? [f10 from 2021 Consumer Survey] Germany who do not plan to shop (534)

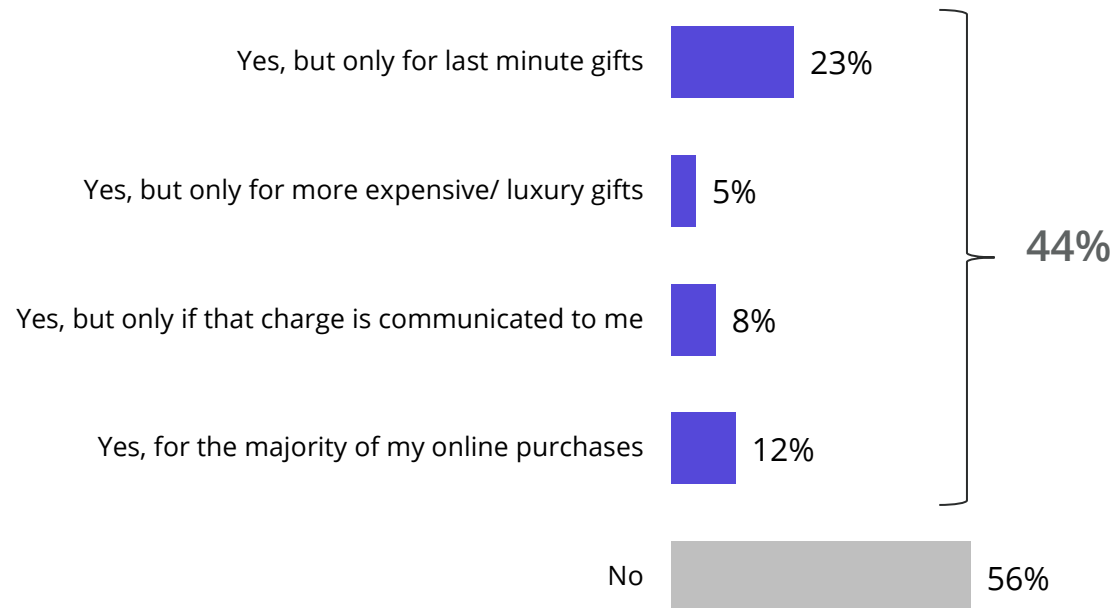
Shipping



Willing to spend for last minute gift shipment

Less than half would pay additional fees to ensure gifts are delivered on-time and for most, this will be limited to last-minute gifts. Being unwilling to pay an additional fee for delivery increases with generation, where 22% of Gen Z will not pay an additional fee, this increases to 47% of Millennials, 61% of Gen X, and 82% of Boomers.

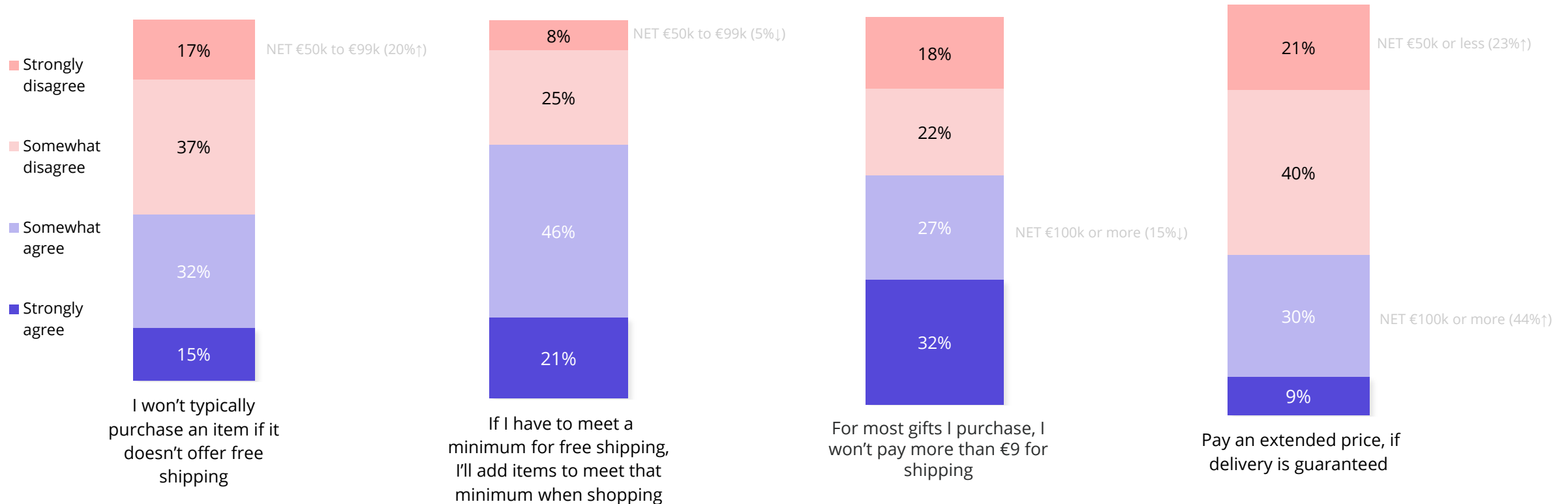
Additional fee for fuel/ express delivery



Shipping

For 6 in 10 Germans, €9 represents a firm maximum shipping cost, with many willing to add additional items to qualify for free shipping.

Paying more for guaranteed delivery is divided across the generations with 64% of Gen Z strongly or somewhat agreeing that they would pay extra for guaranteed delivery compared to 52% of Millennials, 30% of Gen X, and only 18% of Boomers.



q8us3 - When it comes to shipping, do you agree with any of the following? Base: Germany (1,034)

Callouts: What was your total household income in 2021 before taxes (in €)?

Arrows indicate significance at the 95% level and the direction of change.

Free shipping, in consumers' minds, is as powerful as a significant cash discount on sale items.

“On Sale” Deals

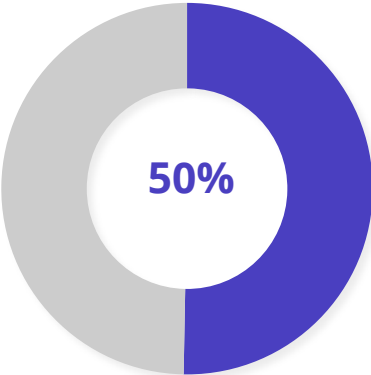


Shopping Trends



Half of German workers have done holiday shopping during the work day, while 4 in 10 of those that have shopped have done so in a secret browser. Younger generations are more likely to do both .

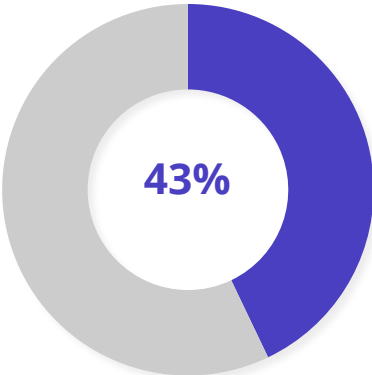
Shopping at work



Gen Z (67%↑), Millennials (61%↑), Gen X (45%↓), Boomers (39%↓)

Have shopped during the workday or while working.

Secret Browser



Gen Z (56%↑), Boomers (10%↓)

Opened a secret browser on work computer to shop.

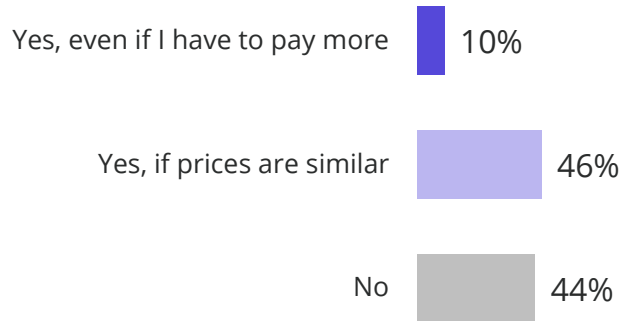
q8us5 - Do you, or have you ever done, holiday shopping during your workday or while you were working? Base: Germany, full or part-time employed (686)

q8us6 - Have you ever opened a secret browser on your work computer so your employer wouldn't find out you were shopping during the workday? Base: Germany, full or part-time employed and have shopped at work (345)

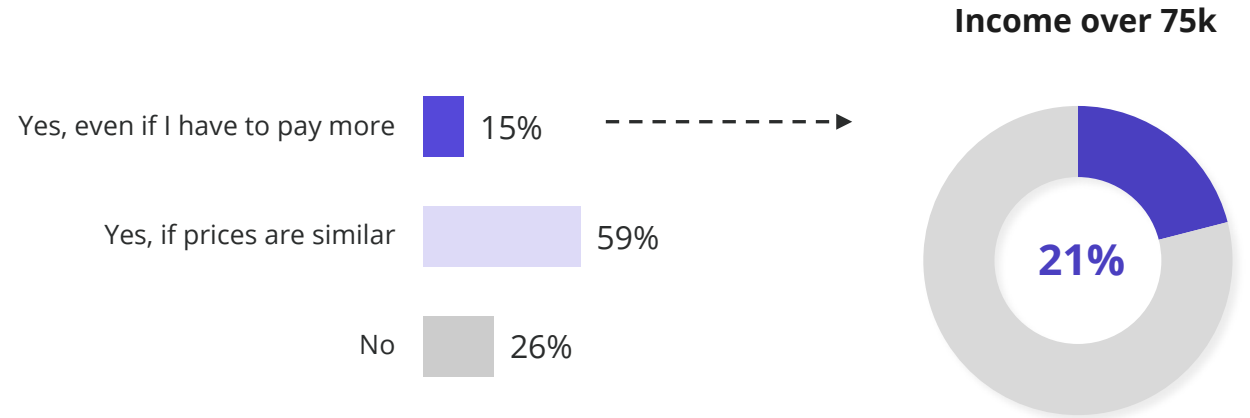
As long as prices are competitive, consumers in Germany will prioritize German made products, small, and minority-owned businesses. Unlike other countries, this doesn't rise significantly among higher income individuals.

Gen Z is more likely than other ages to do any of the above even if they have to pay more.

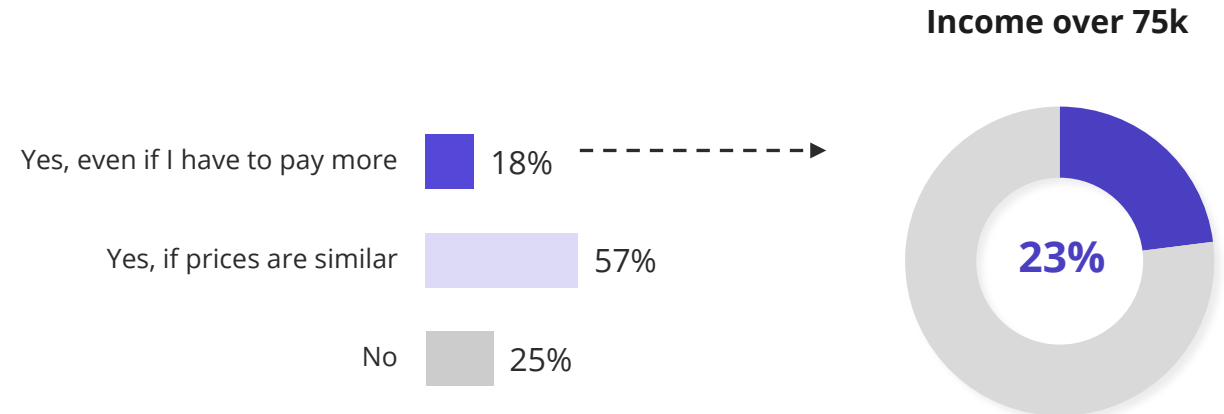
Prioritise shopping with minority-owned businesses



Prioritize Local or Small Businesses



Prioritize German Made Products



q8us8 - Will you actively seek out or prioritise shopping with minority owned businesses? Base: Germany (1,034)
q8us7 - Will you prioritise shopping with local or small businesses this holiday season? Base: Germany (1,034)
q8us9 - Will you actively seek out or prioritize buying German made products this holiday season? Germany (1,034)
Callouts: d3- What was your total household income in 2021 before taxes, (in €)?

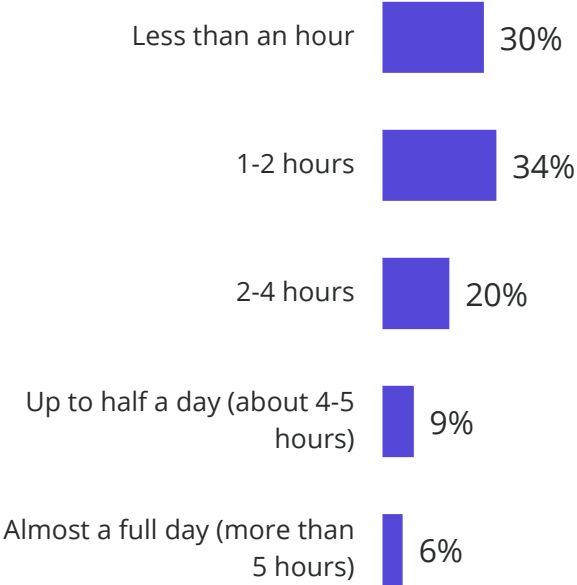
Sources of Inspiration for Gifts



While less than an hour is the most popular length of time to spend researching gifts, this is dominated by Boomers while Gen Z and Millennials are more likely to spend 1-2 hours. Women are more likely than men to spend more than a half a day researching gifts.

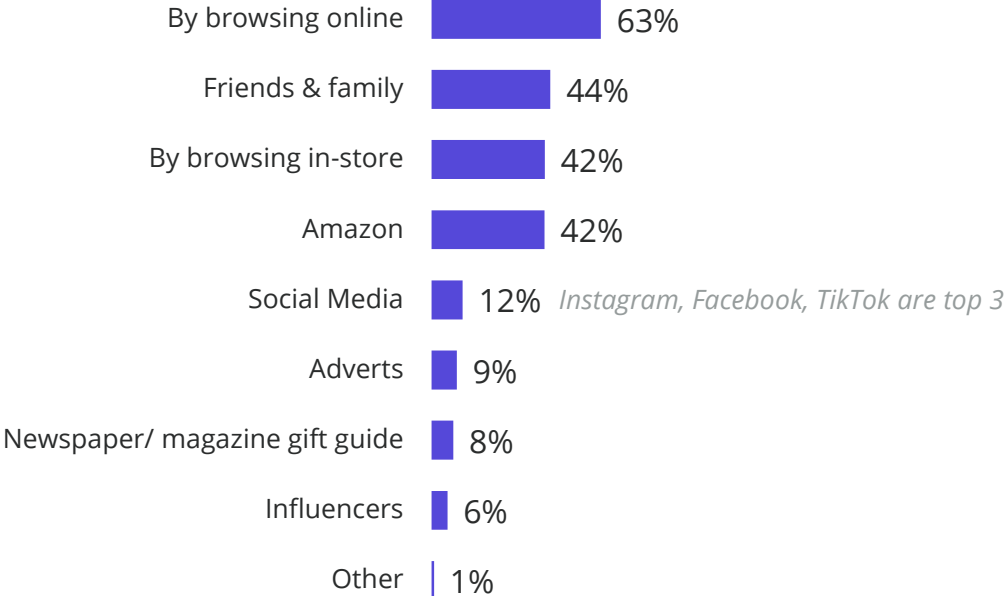
Browsing online is the most popular way to get gift inspirations this holiday season, including Amazon.

Gift Researching



Sources of Inspiration

(% rated in top 3)

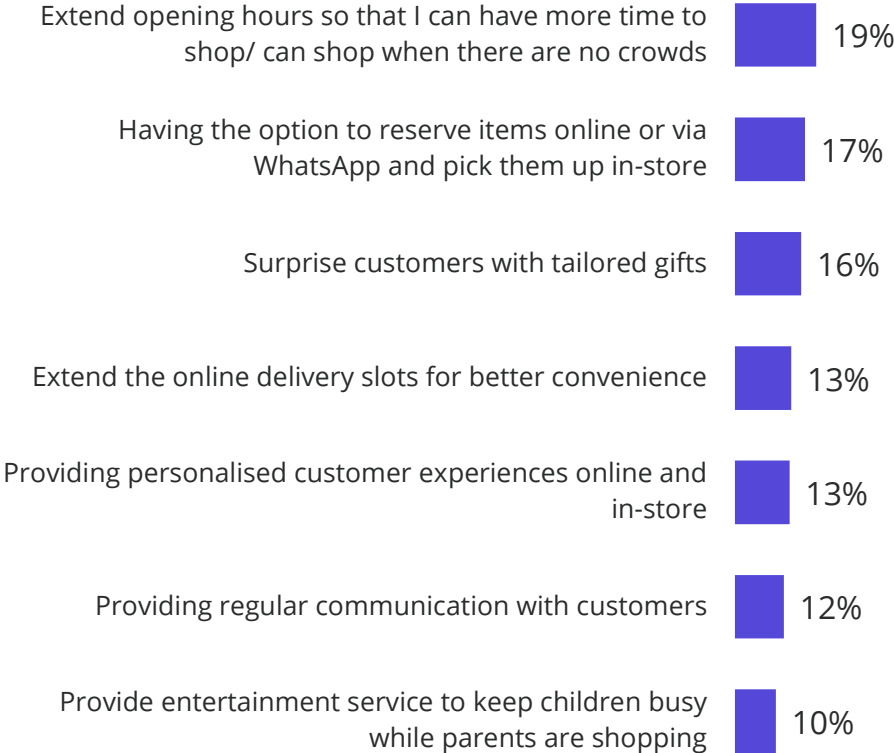


q8us1 - If you have a specific gift in mind, how long will you spend researching and comparing prices for that item before you buy it? Even if you spend time over several days coming back to an item... Base: Germany (1,034)
q23 - Where are you going to get gift inspirations from this holiday season? Base: Germany (1,034)
Callout: q23a - Which social media platforms are you going to get gift inspirations from this holiday season?

How Retailers can make Christmas memorable

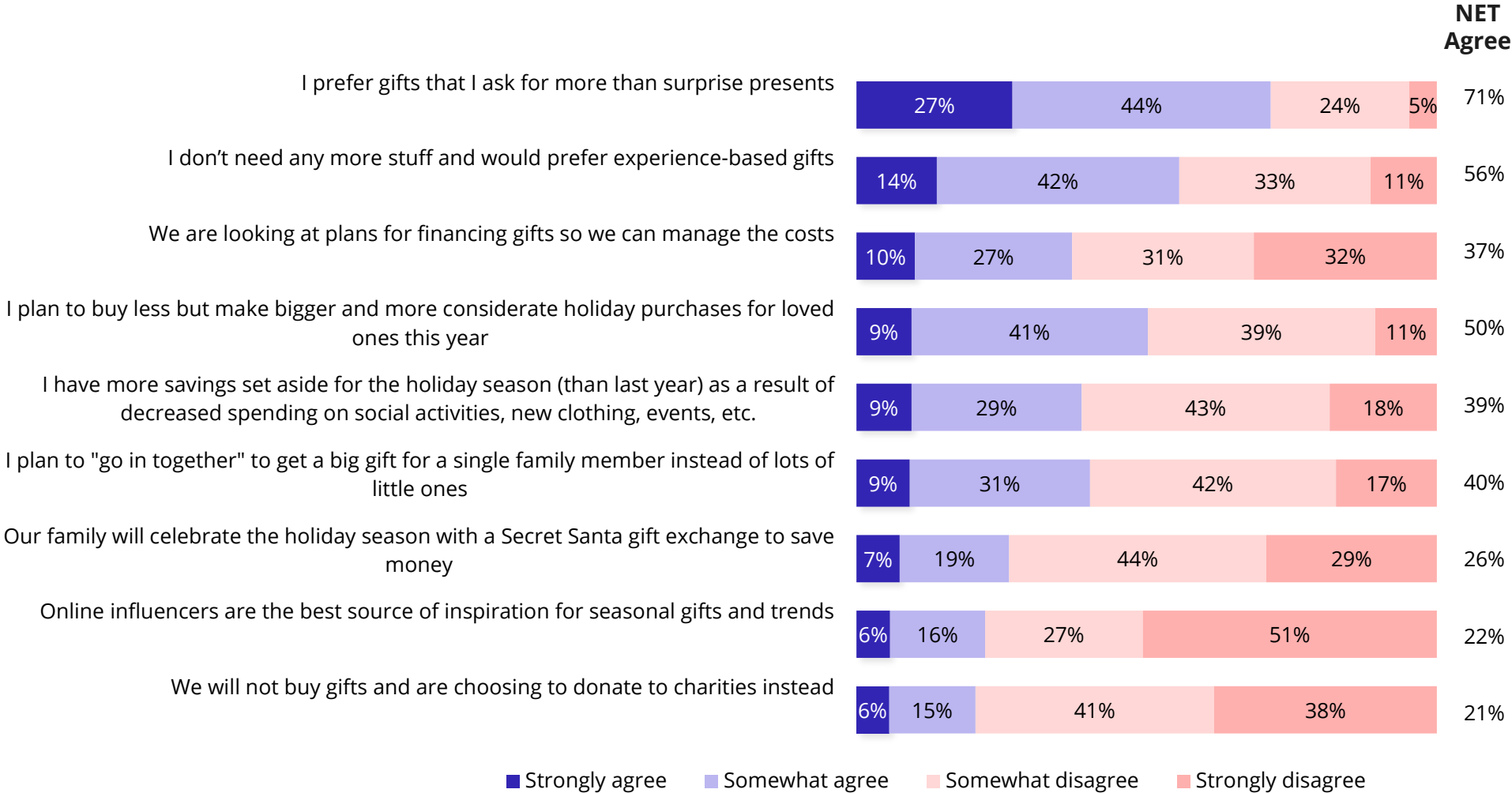


Extended opening hours is an important way that retailers can help to make Christmas memorable this year. Surprise tailored gifts are more important to older generations than younger generations, while the option to reserve items is more important to women than men.



q31 - Other than being mindful on the cost, what else could retailers do to help make Christmas more memorable this year? Base: France (1,089)

Gifting Wishlist



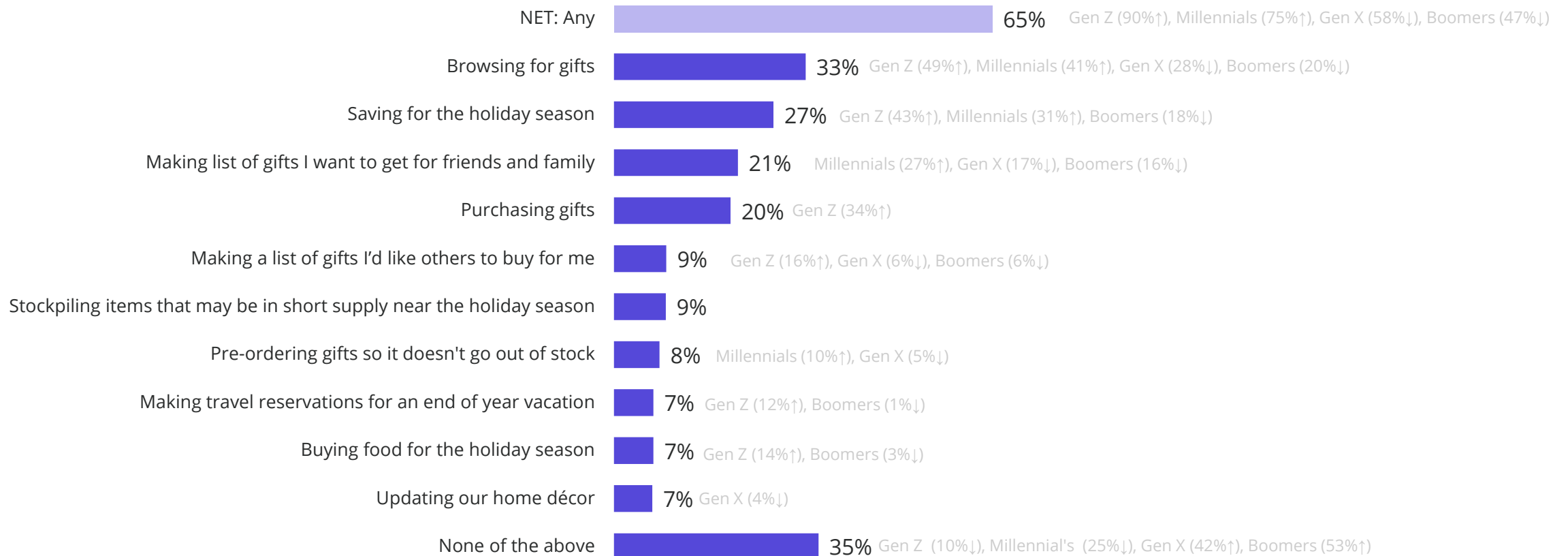
q14 - To what extent do you agree with the following? [f3_a from 2021 Consumer Survey] Base: Germany (1,034)

Timing of Holiday Shopping



Holiday Shopping Timing

A high proportion of German shoppers have started thinking about the holiday season, with gift browsing and saving the most common activities being undertaken. The younger generations are more likely than the older to have started doing any of the activities, with over half of Boomers undertaking none of the activities surveyed.



q3 -Have you started doing any of the following for the holidays this year? Base: Germany (1,034)

Holiday Shopping Timing

1 in 4 German consumers have already started holiday shopping this year, with November also being a popular time to begin shopping.

This is not a divergence from the time they shopped last year, though just under 1 in 4 say they will start shopping earlier this year.

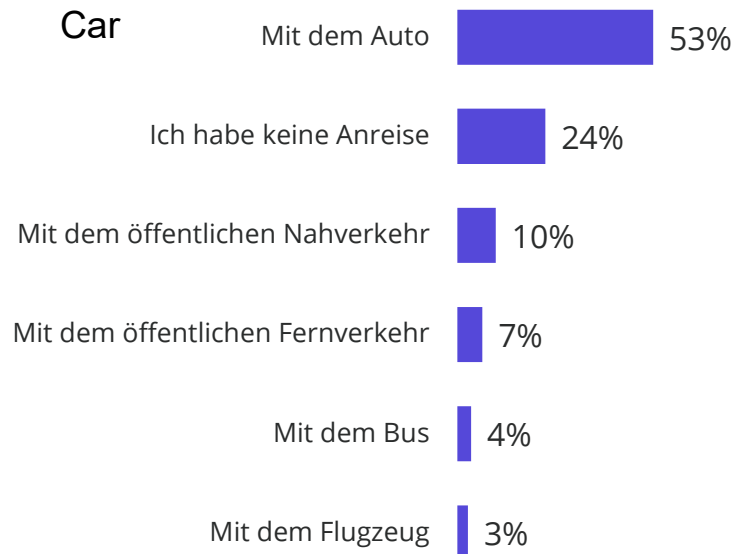


q1fr - When did/ do you plan to start your 2022 holiday (e.g., Christmas, Hanukkah, Diwali, New Year's) shopping this year? Base: Germany (1,034)
 q2 - Compared to last year, did/do you plan to start holiday shopping... Base: Germany (1,034)
 Callouts: S0 (generations, age) – In what year were you born?
 Arrows indicate significance at the 95% level and the direction of change.

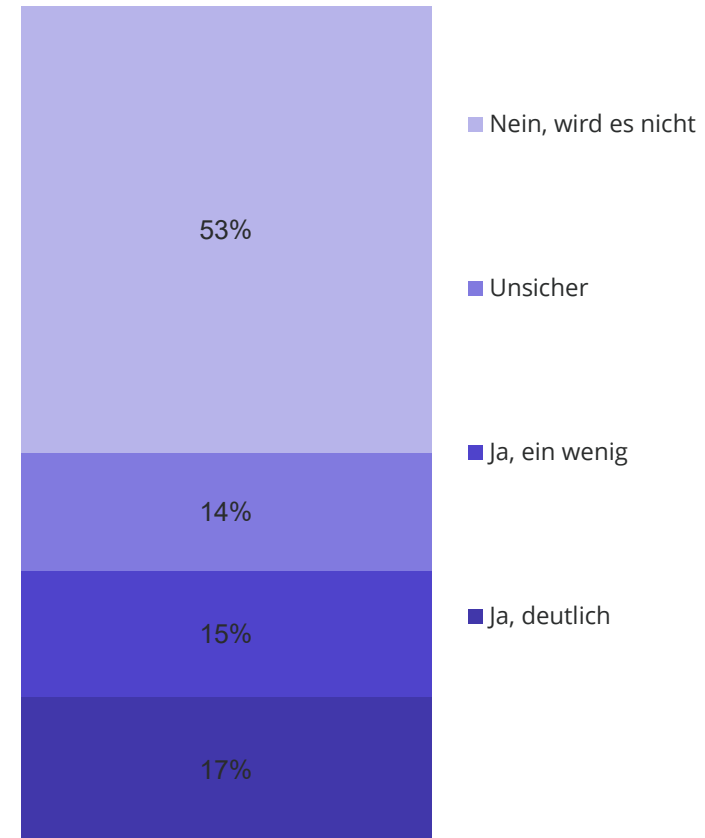
Half of Germans travel by car for holiday visits to family. One in four do not travel at all.

And it can be expected that less will now use public transport to travel, with almost a third of Germans (32%) being affected by the end of the €9 ticket.

Mode of Travel



Impact of End of the €9 ticket



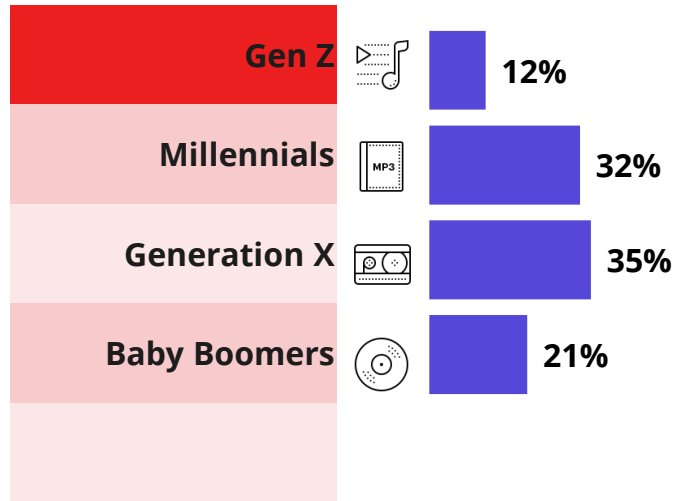
q35de - Wie reisen Sie während der Feiertage zu Ihrer Familie? Base: Germany (1,034)

q36de - Wird sich das Ende des 9€-Tickets negativ auf das Budget für Ihre Weihnachtseinkäufe auswirken? Base: Germany (1,034)

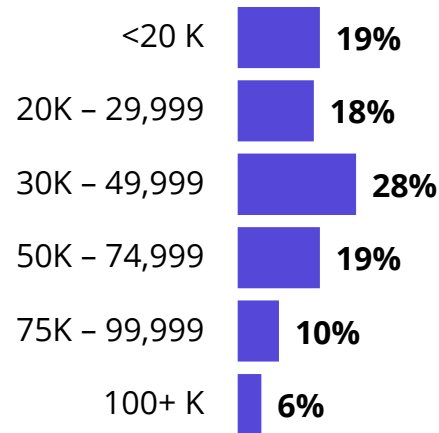
Respondent Profiles



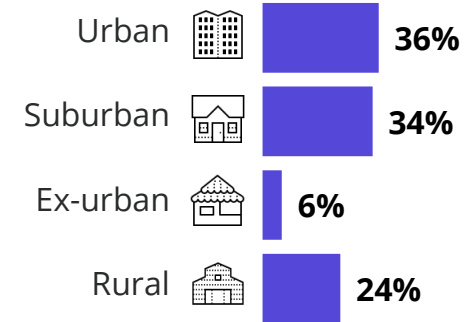
Generations



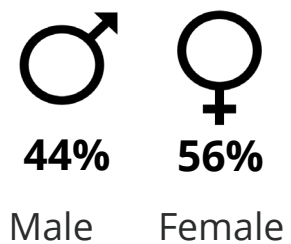
Annual Income



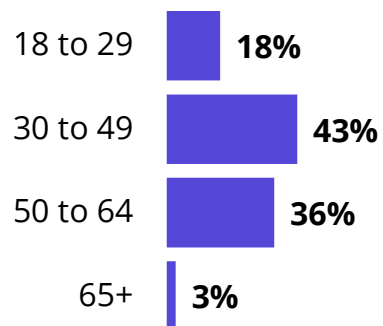
Neighbourhood



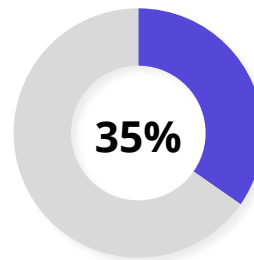
Gender



Age

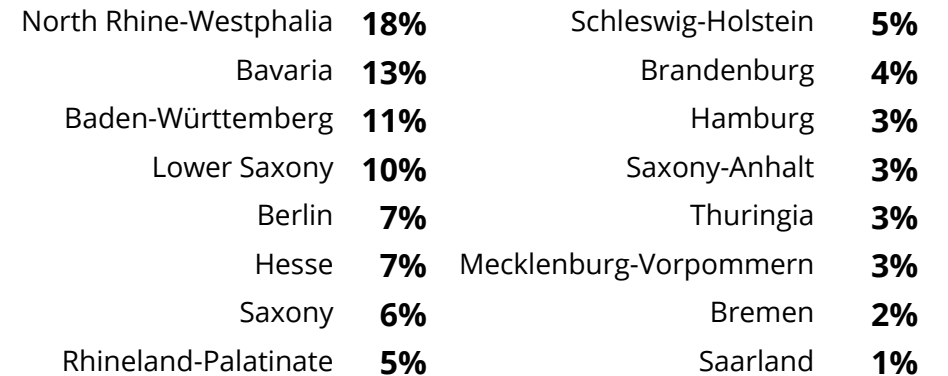


Children at Home



with at least one child at home.

Region



S0 (generations, age) – In what year were you born? Base: Germany (1,034)

D3 – What was your total household income in 2021 before taxes (in €)? Base: Germany, excludes 'prefer not to say' (975)

D5 – How would you describe your neighborhood? Base: Germany, excludes 'prefer not to say' (1,023)

S2 – How do you identify yourself? Base: Germany, excludes 'prefer not to say' (1,030)

D4 – Do you have children under the age of 18 living in your home? Base: Germany, excludes 'prefer not to say' (1,012)

D1DE (region) – Where specifically do you live? Base: Germany (1,034)

Appendix

The holiday season will be the highlight of my year...	2021	2022
NET: Agree	49%	61%
Strongly agree	16%	19%
Somewhat agree	33%	42%
Somewhat disagree	34%	27%
Strongly disagree	17%	12%

How are you hoping to celebrate the holiday season?	2021	2022
A simple celebration with my close family	55%	62%
Multiple gatherings with friends and family throughout the holiday season	25%	16%
A special New Year's eve celebration	12%	13%
A larger than normal celebration with extended family	8%	9%
A big party with friends	8%	9%
Going to get in the festive spirit early this year	10%	9%
Day trips / short stay vacations within my country	15%	8%
Longer vacations within my country	8%	5%
A lavish vacation abroad	6%	5%
Other	1%	1%
Nothing, I don't plan to celebrate	14%	11%

q13 - The 2022 holiday season will be the highlight of my year: To what extent do you agree ...? Base: Germany (1,034)
[f3_a from 2021 Consumer Survey] Base: Germany consumer (1,011)

q10 - How are you hoping to celebrate the 2022 holiday season (e.g., Christmas, Hanukkah, Diwali, New Year's)? Base: Germany (1,034)
[C6a from 2021 Consumer Survey] Base: Germany consumers (1,001)

Where did you buy your Christmas turkey (or main food item) in ...	2021	2022
Kaufland	17%	18%
Rewe	15%	17%
Edeka	16%	16%
Lidl	8%	10%
Aldi	9%	8%
Netto	5%	4%
Penny	4%	3%
Real	3%	3%
Norma	1%	1%
Tegut	1%	1%
Alnatura	1%	1%
Other	19%	17%

q16 - Where did you buy your Christmas turkey (or main Christmas food item) from in 2021? Base: Germany (1,034)

q16a - Where are you planning to buy your Christmas turkey (or main Christmas food item) from this year? Base: Germany (1, 034)

How do you feel when you think about the 2022 holiday season?	Unweighted %
I am feeling excited to spend time with family and friends	20%
I look forward to eating Christmas lunch/dinner with my family	16%
I haven't started thinking about it yet	13%
I look forward to all the festive celebrations	12%
I look forward to choosing gifts for friends and family	9%
I am dreading that I won't be able to afford it	7%
I look forward to cooking Christmas lunch/ dinner	6%
I am not looking forward to it as I don't enjoy this season	5%
I can't wait to binge all my favourite Christmas films	4%
I am indifferent	4%
Unsure	4%
Other	0%

Impact of Influencers

2021 results

q6_net_agree - [Summary table, NET Agree] To what extent do you agree with the following attitudes about online 'influencers'?

	Total	age - In what year were you born? (Recoded, Buckets)	
		NET 18-44	NET 45+
I'll have a "fear of missing out" (FOMO) if I am not able to obtain a product or service a favorite influencer presents for the holiday season	19%	39% S ↑	6% S ↓
I'll be looking to influencers I follow to inspire my holiday preparations, including decorations and clothing	22%	42% S ↑	9% S ↓
I don't trust online influencers and their recommendations	78%	72% S ↓	82% S ↑
I don't relate to the influencers out there	81%	73% S ↓	86% S ↑
I'd love to be an influencer	21%	43% S ↑	7% S ↓
I find influencers vain and annoying	75%	68% S ↓	79% S ↑
I am inspired by their lifestyles - influencers show me how to live my best life	24%	46% S ↑	9% S ↓
I am already an influencer	16%	33% S ↑	5% S ↓
Influencers don't interest me at all	82%	72% S ↓	88% S ↑

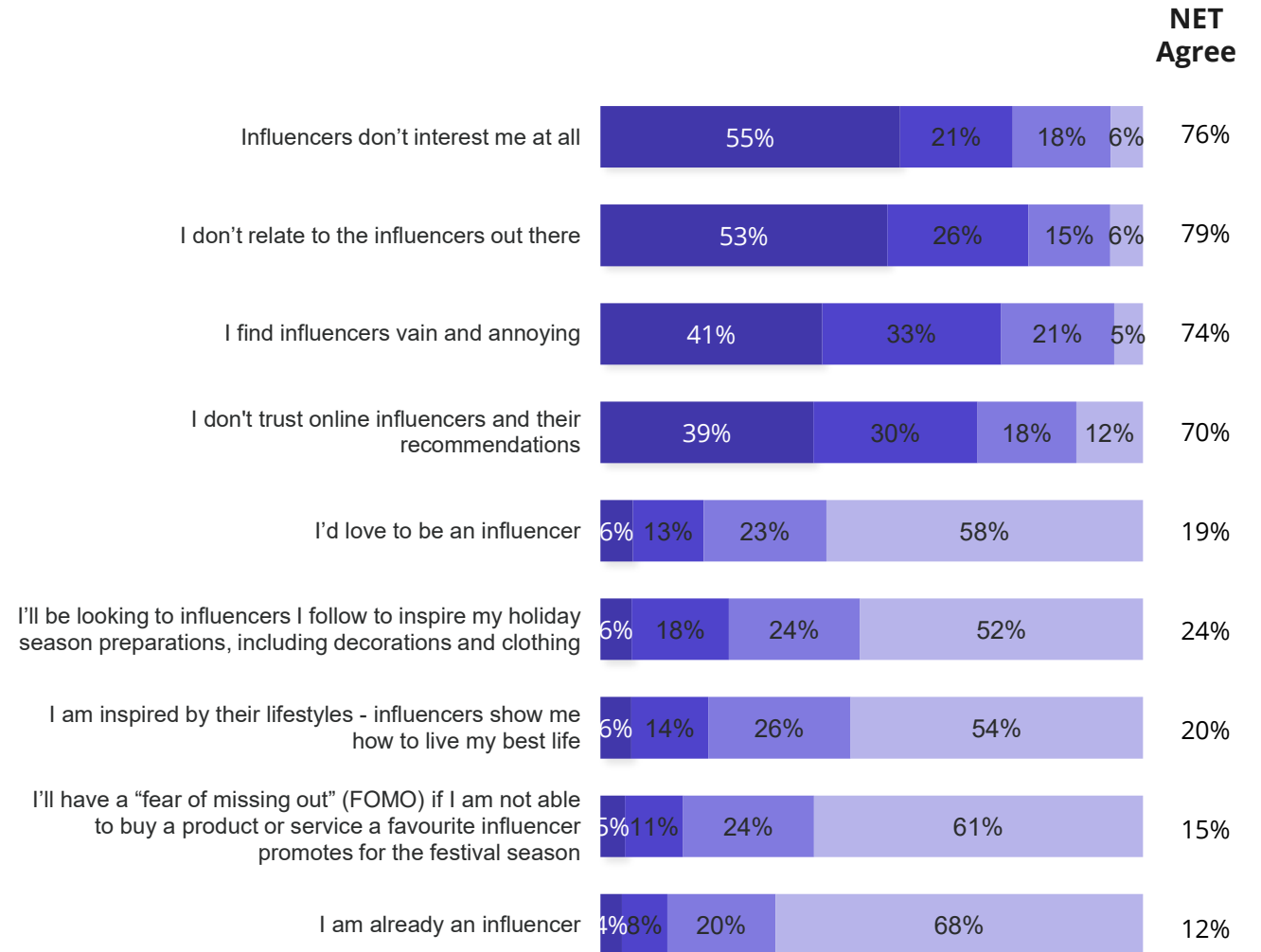
Weight: Unweighted

Filters: None

Upper case letters indicate significance at the 95% level.

Arrows indicate the direction of a statistically significant change.

Each column is compared to the sum of all other columns, excluding itself.



■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree

q22 - To what extent do you agree with the following attitudes about online 'influencers'? Base: Germany (1,034)
[Q6 from 2021 Holiday Consumer Survey] Base: Germany (1011)



Thank you

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