AL MARKETING

Seasonal Shopper Survey

DECEMBER 2023 - RESULTS SUMMARY

Welcome to the first in a series of consumer research surveys which aim to act as a barometer of public opinion on issues affecting retail and leisure destinations.

Over 800 shoppers responded to a range of questions testing attitudes in the run-up to Christmas 2023. The results are a fascinating insight into how shoppers continue to find their way in a post-pandemic world.

Our thanks to the shopping centre teams across the UK that shared the survey across their social media channels and we look forward to developing the surveys further as we move through 2024.

For more information or to participate in our post-Christmas survey please get in touch.

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"The AL Seasonal Shopper Survey delivers valuable insights on shoppers' sentiment and intentions, and enhances the intelligence gathered by centres on their shoppers. It means that centres have an improved understanding of shopper behaviour, enabling their marketing and management initiatives to be even more effective."

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Shoppers are still going to retail destinations for Christmas shopping, but they are largely cautious in terms of gift buying and eating out, but with a shift to home entertaining which is likely to be driven by higher prices:

Over two thirds of shoppers are spending the same or more than last year in shopping centres or high streets on gifts (69%).

Spending on eating out is reduced (31% spending less this year) although 27% who are spending more.

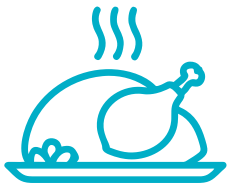
Spending on experiences as gifts has been cut (just 19% are spending more while 29% are spending less).

Spending on entertaining at home has increased (45% of shoppers are spending the same amount and 30% are spending more than last year entertaining at home, whilst just 19% of shoppers are spending less).

Shoppers appear to be sacrificing high value items for more functional items:

Significantly fewer shoppers are buying tech this year than last (**40%** are buying fewer tech items than last year) – with tech items being high value they are likely being sacrificed due to cost.

Beauty spending is resilient (**47%** are buying the same number of beauty items and **27%** are buying more beauty items than last year) – the much talked about “lipstick effect” of a recession which is the demand for an affordable treat, but also the fact that some gifts may be replenishing beauty items rather than less-used gifts.



There is a greater spend on food this year (**45%** are buying more food items than last year) which demonstrates the impact of inflation, but it also reflects the priority amongst consumers for not sacrificing the Christmas lunch.

Upcycling/charity products are increasing in significance (**23%** buying more, **26%** buying the same, but just **14%** buying fewer items than last year). Part of this will be due to an increased awareness of sustainability/ recycling but increased cost will be a influencer here.

The dumbbell effect of Black Friday is real, and the week leading up to Christmas will be as important as Black Friday:

Over half of shoppers carry out most of their Christmas shopping over Black Friday and early December (**55%**).

The week before Christmas will be as important in as Black Friday (**22%** of shoppers say they will do most of their Christmas shopping in the week before Christmas vs **19%** on Black Friday).

But as many shoppers carry out most of their Christmas shopping before Black Friday (**21%**) as in the week before Christmas which is something for retailers to consider in their planning for the festive shopping period.

Thank you