

FMCG AND RETAIL REPORT 2022

The path to purchase for global seasonal events

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► Introduction

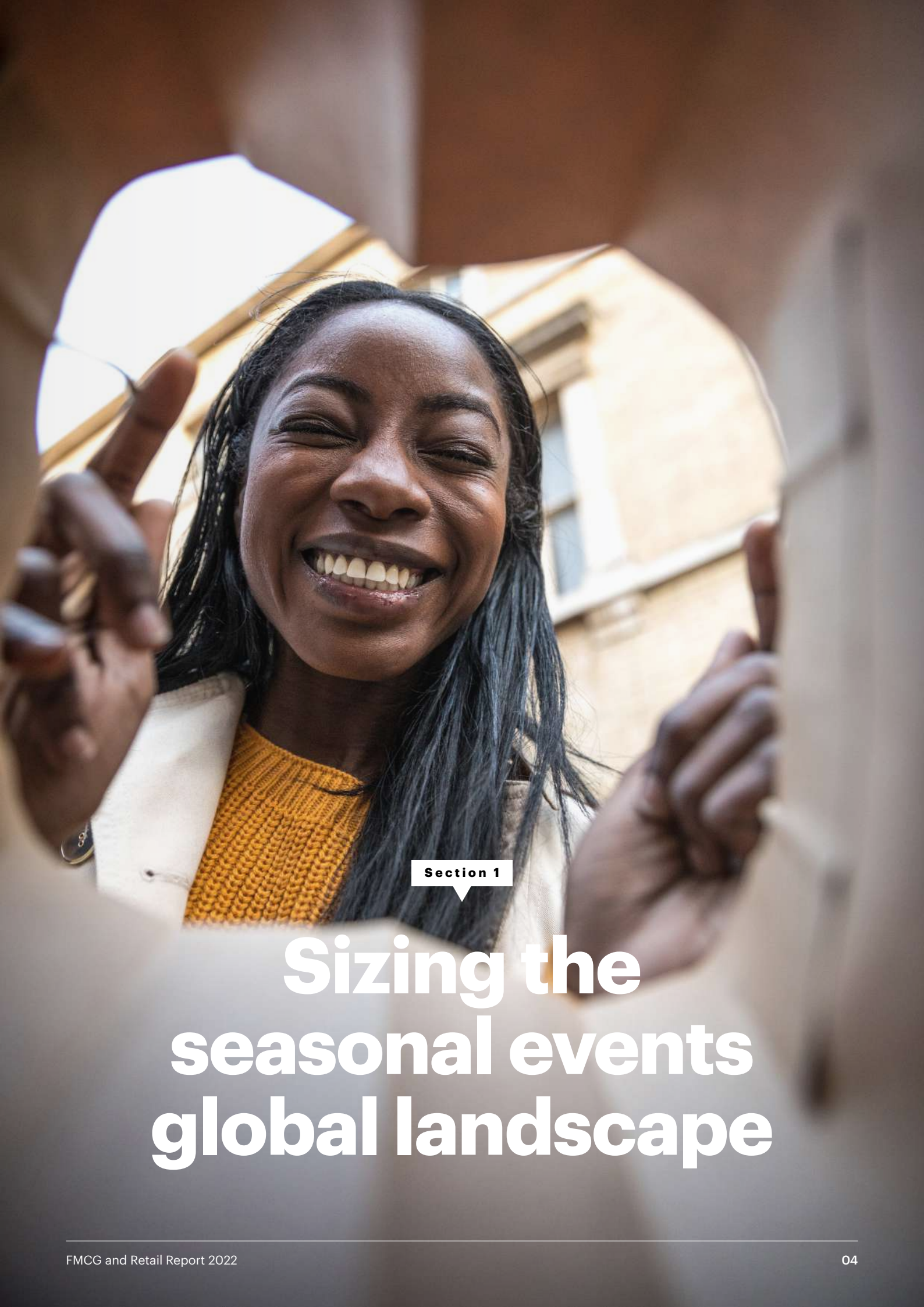
The pandemic forced many countries to implement lockdown restrictions and temporary closures of non-essential stores, bars, restaurants, and venues. However, as vaccination rates increased across the globe and restrictions began to ease in many countries, consumers gradually started to return to in-person activities.

The pandemic not only impacted the way we celebrated momentous seasonal events, but also how we shopped for them. It created a surge in ecommerce where global consumers significantly increased their online shopping. For many, purchasing items online for seasonal events was the only option. However, as shoppers gradually returned to the high street, the FMCG and retail sector witnessed a rapid growth in seasonal sales. For example, in 2021, US retail sales over the holiday season (November-December) registered the strongest year over year growth in over 20 years driven by resurgent brick-and-mortar sales and continuing ecommerce growth.

Seasonal events provide a unique opportunity for retailers and FMCG brands to increase sales globally during low sales seasons. There are many events, sales days, and seasonal peaks throughout the year that FMCG brands and retailers can leverage to build awareness and engagement, and boost sales. Christmas, Easter, and Mother's Day are some of the best-known examples, but shopping sales events such as Black Friday or Cyber Monday, and Amazon Prime Day, where products are offered at highly discounted prices for limited periods, are fast taking share away from traditional store-based shopping. To maximise sales return for seasonal events, it is essential for retail and brand marketers to understand the market potential of each seasonal event, how these vary by country, and how seasonal shopping demographics and behaviors differ for each event.

This report combines syndicated YouGov data with deep-dive Custom Research covering Christmas or Thanksgiving, Mother's Day or Father's Day, Black Friday or Cyber Monday, Summer Holidays, Easter or Spring Break, Back-to-School, Amazon Prime Day/Week, Halloween, and Singles' Day across 18 international markets. It reveals the sources consumers use to inspire their buying decisions, how they are purchasing for each seasonal event, what products and services are being purchased, who they buy for, and their adjustment on spend leading up to each event. The intent is to inform FMCG brands and retailers about the consumer seasonal event shopping process to aid in their seasonal marketing and advertising campaigns.

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Section 1

Sizing the seasonal events global landscape

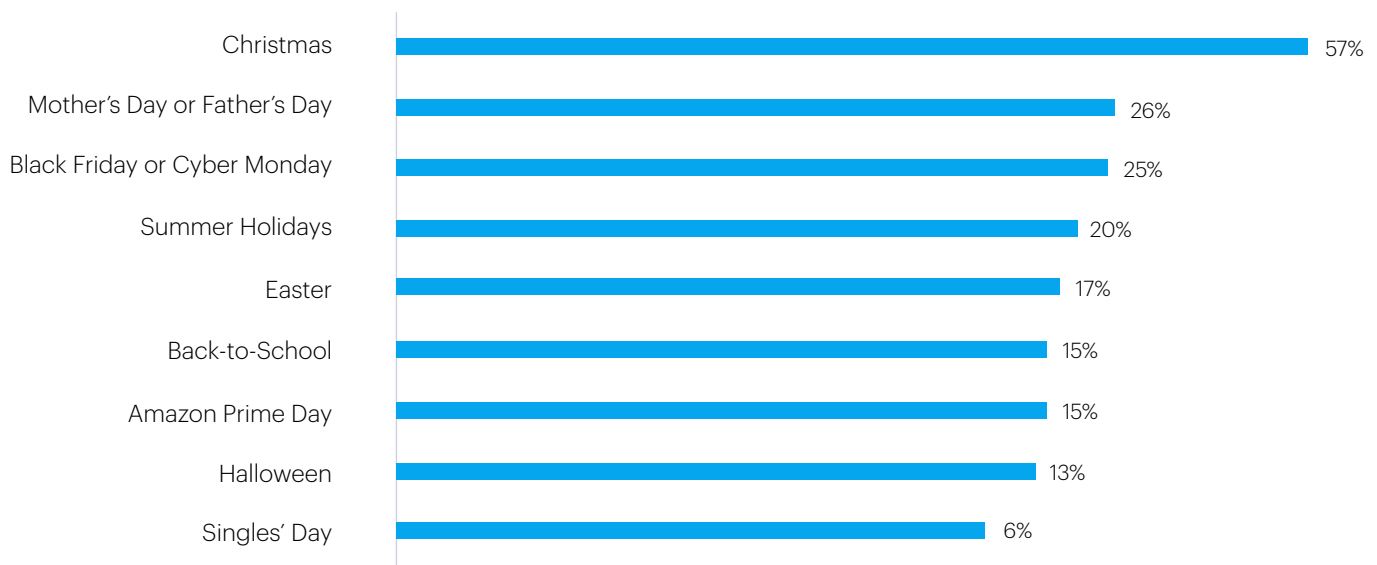
Marking calendars for more than Christmas

For most consumers, shopping around festivals and special occasions has become customary – whether they shop because of tradition, sentiment, or tempting deals. The typical holiday shopping season is no longer limited to the November to December festive period, as multiple events are now promoted globally by retailers and FMCG brands alike

throughout the calendar year. Ecommerce behemoths such as Amazon and Alibaba have brought dedicated shopping sales events into the mainstream – breaking sales records year after year. **YouGov Custom Research** among adults across 18 international markets unveils the top seasonal events that consumers shopped for in the last 12 months.

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Top seasonal events shopped for last 12 months (Global)



Q: Which of the following seasonal events have you shopped for in the last 12 months?

Globally, traditional holidays dominate the shopping season by a strong margin, with about six in ten (**57%**) consumers shopping for Christmas (incorporating Thanksgiving in the US and Canada) in the last 12 months. Mother's Day or Father's Day is the second most popular seasonal shopping event registering **26%** of global shoppers. Both these family occasions have become big opportunities for FMCG brands, and for high street and digital retailers alike.

Black Friday or Cyber Monday (incorporating Cyber Week) is the third most popular event for global shoppers with **25%** of consumers shopping for items on these shopping sales days. Whilst lesser proportions of global consumers (**15%**), claim to shop for Amazon Prime Day (incorporating Amazon Prime Week) and Singles' Day (**6%**), these events have grown in popularity.

Exclusive discounts and offers, engaging marketing, and shortening delivery timeframes have heightened the appeal of shopping sales festivals, making these shopping events ones that consumers eagerly await. However, whilst many retailers and FMCG brands embrace these seasonal sales events across the world, the challenge is to maintain shopper interest and engagement around these specific sales occasions, as consumers are increasingly seeking out bargains all year-round using cashback and couponing apps such as Groupon. The increasing 'expectation' of 'constant bargains' throughout the year has had its impact on some retailers who have made a point of not entering events such as Black Friday. Instead, opting to give customers year-round deals rather than a single day of discounting.



Christmas drives seasonal shopping for global consumers

Before we delve into each seasonal event in detail by country, YouGov explored the top three ranked countries for shopping in the last 12 months for each seasonal event, and some interesting insights for retailers and FMCG brands emerged. Firstly, out of the **18** international markets surveyed, **15** different countries appeared in the top three rankings for the nine seasonal events measured. This indicates huge diversity in shopping patterns and consumer behavior across the regions.

Christmas is the most popular seasonal shopping event in 17 out of 18 international markets surveyed, and in EMEA and the Americas, Christmas shopping emerged as the clear winner in all markets, with more consumers shopping for Christmas in the last 12 months than any other seasonal event. European markets dominate the Christmas agenda with GB (**76%**), Spain (**74%**) and Poland (**73%**), ranked in the top three for Christmas shopping in the last 12 months.

Top three countries for each seasonal event

	1 st	2 nd	3 rd
Christmas	GB (76%)	Spain (74%)	Poland (73%)
Mother's Day or Father's Day	Mexico (39%)	GB (35%)	Poland (34%)
Black Friday or Cyber Monday	Spain (41%)	Italy (40%)	Singapore (32%)
Summer Holidays	France (32%)	Poland (30%)	Denmark (29%)
Easter or Spring break	Poland (47%)	Germany (31%)	Denmark (29%)
Back-to-School	China (29%)	Mexico (28%)	UAE (27%)
Amazon Prime Day	India (38%)	Spain (29%)	Italy (29%)
Halloween	Canada (27%)	US (22%)	Mexico (19%)
Singles' Day	China (33%)	Singapore (22%)	Hong Kong (13%)

Q: Which of the following seasonal events have you shopped for in the last 12 months?

YouGov Custom Research

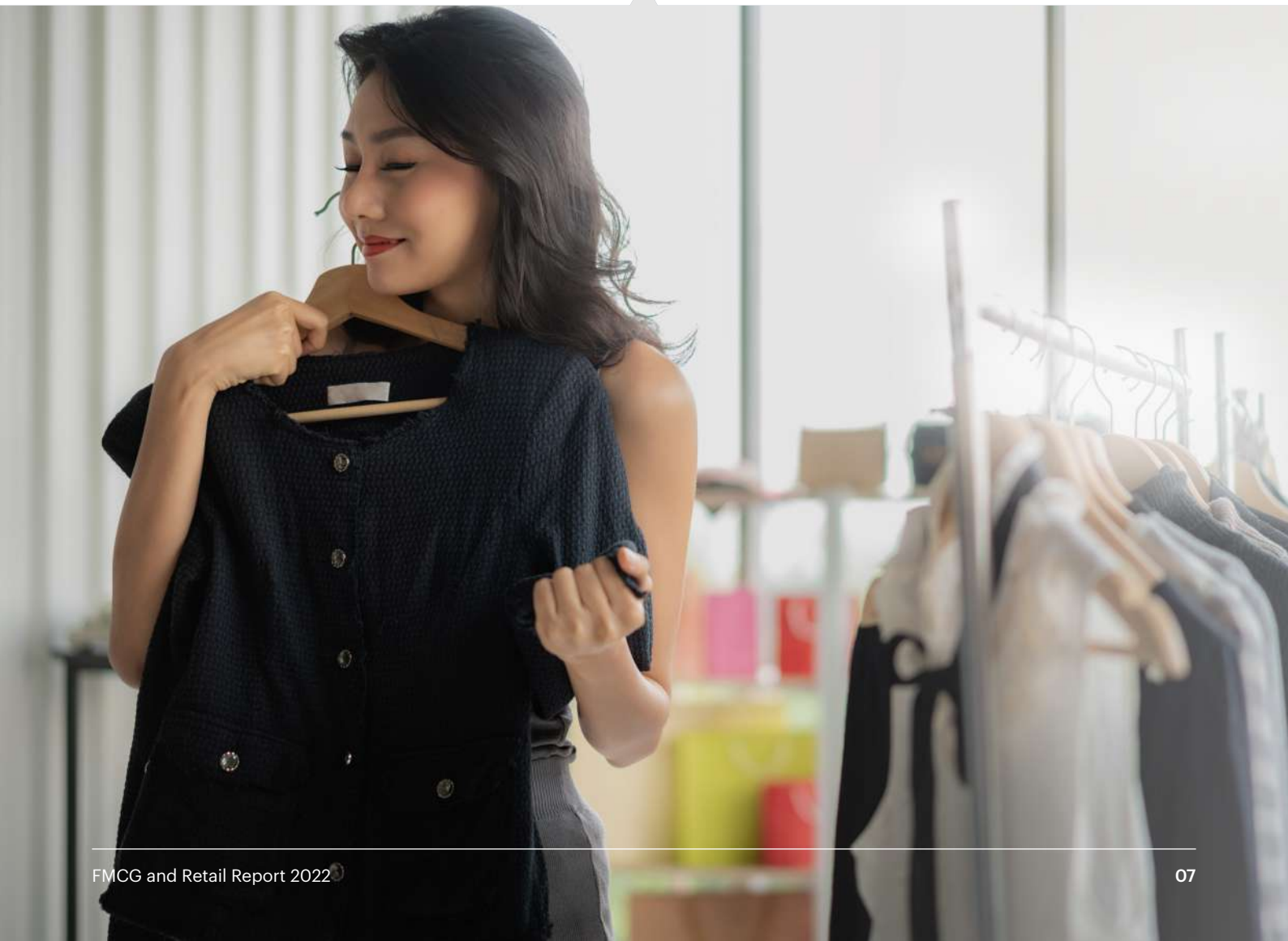
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Mother's Day or Father's Day is the second most popular shopping event globally, with Mexico taking the lead followed by GB. Turning to Black Friday or Cyber Monday, Spain dominates with **41%** shopping for this seasonal sales event in the last 12 months, followed by **40%** of Italians and **32%** of Singaporeans. European markets dominate the summer holiday and Easter shopping seasons with Poland registering the highest proportion of shoppers for Easter (**47%**), followed by Germany (**31%**), and France dominating for Summer Holidays (**32%**).

Whilst Halloween appears lower down the seasonal event priority list for global shoppers, Canada (**27%**), the US (**22%**) and Mexico (**19%**) are the top scoring markets for this event.

Looking at the seasonal sales events, Singles' Day is the most shopped for event in the last 12 months in China (**33%**), followed by Singapore (**22%**). In India, Amazon Prime Day emerged as the top seasonal event shopped for in the last 12 months (**38%**) and this could be attributed to Amazon's 'Great Indian Festival' sale which coincides with the beginning of the festive season. This event is also popular among Spaniards, ranking 2nd behind India with **29%**.





Section 2

Exploring seasonal events by age and country



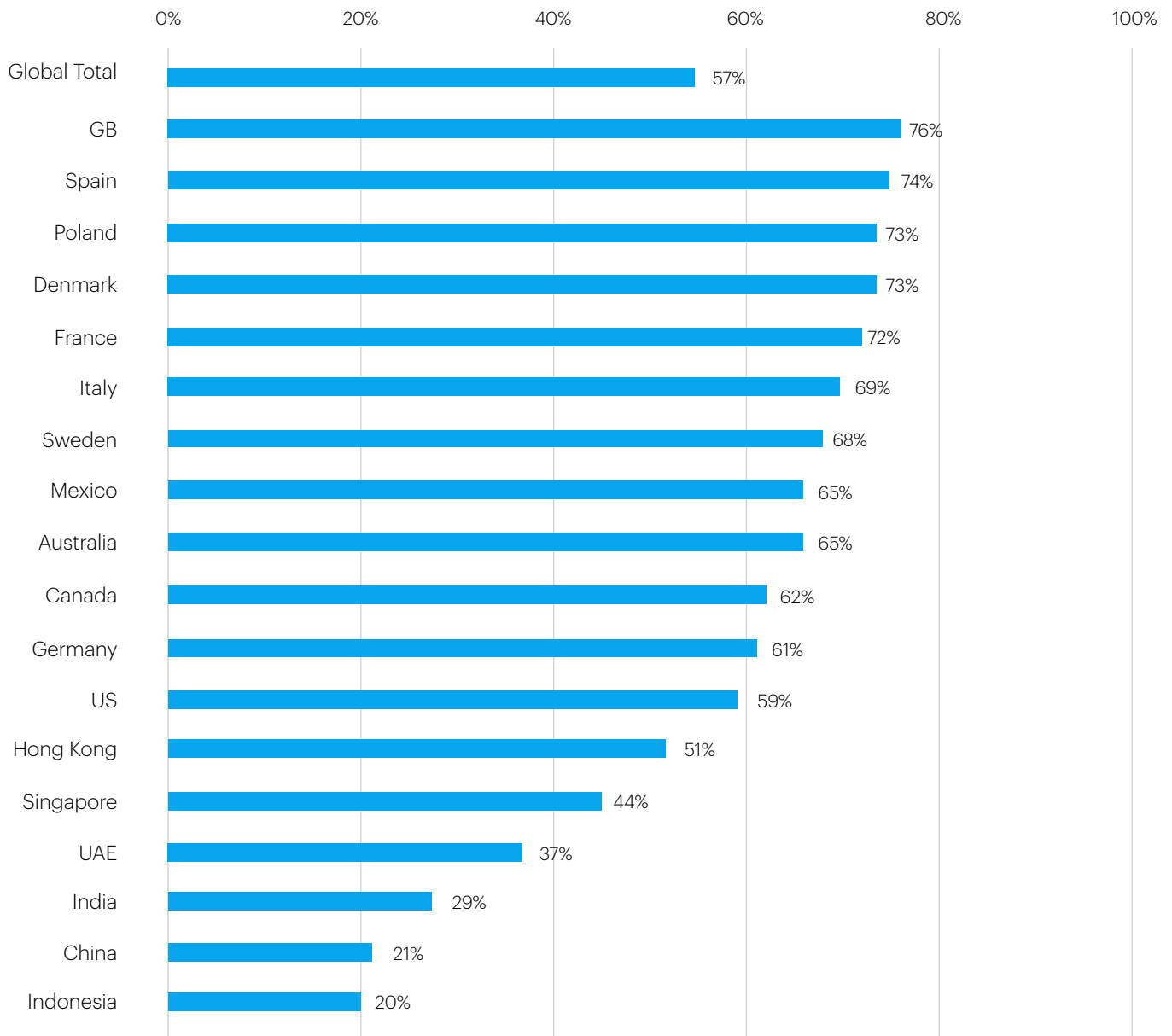
Christmas shopping outshines all seasonal events

Looking at seasonal shopping events in more detail, over 160 countries worldwide celebrate Christmas, particularly those with a strong Christian tradition. It is also a 'cultural' event for many non-Christian markets. Christmas is a hugely important event for many retailers and consumer-goods industries, and from a marketing point of view, Christmas has increasingly become a global phenomenon. We have also already seen from our **YouGov Custom Research** that Christmas is the most shopped for seasonal event in the last 12 months for almost all the international markets surveyed. European markets dominate the top six with penetration ranging from **69%** of Italians and **76%** of Brits shopping for Christmas in the last 12 months.

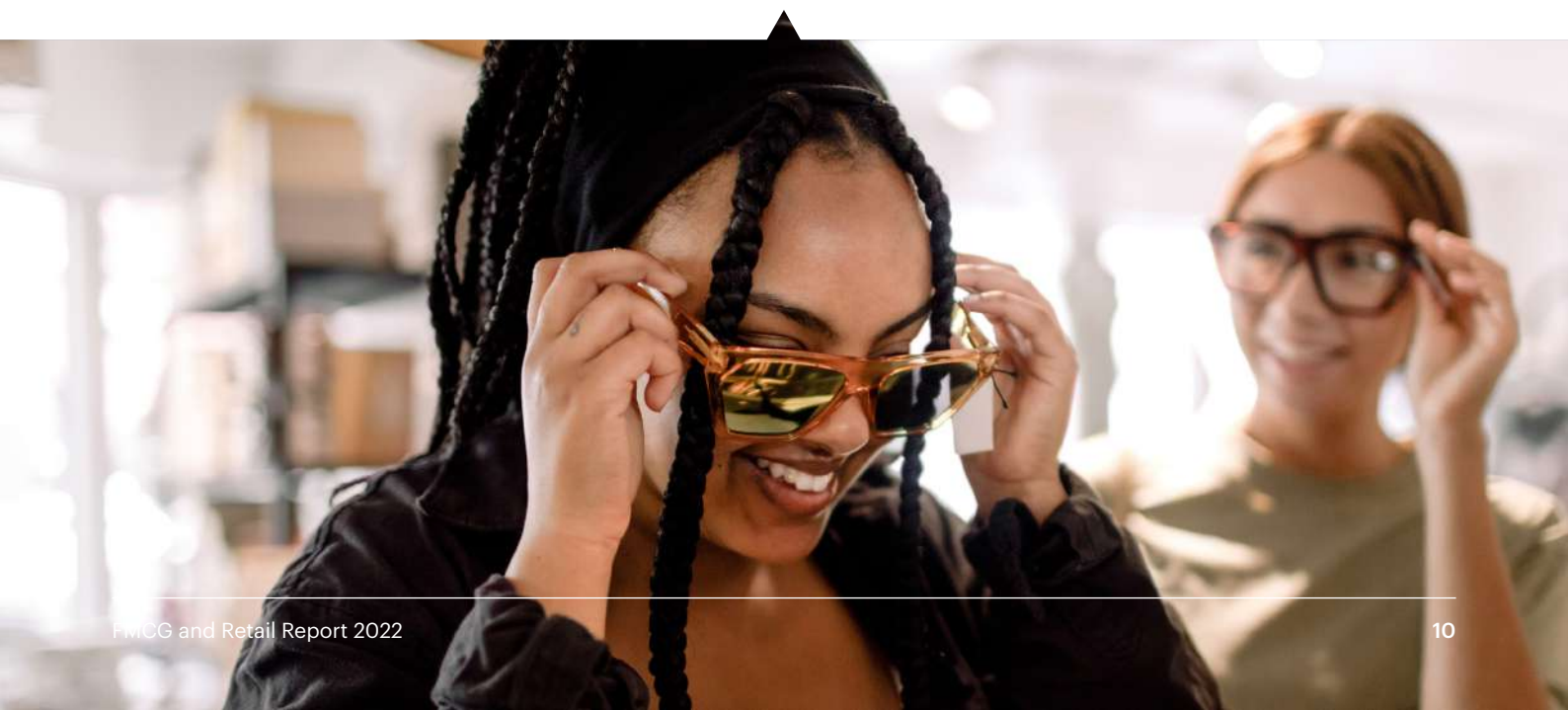
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Although many young Asians view Christmas as a novelty season of shopping and feasting, for most Asian countries, Christmas is not a widely recognised festival, so there are fewer Christmas shoppers. However, this is not the case for all Asian markets. In Hong Kong for example, Christmas is celebrated more extensively than any other East Asian market, with **51%** of Hong Kongers shopping for Christmas in the last 12 months. Similarly, in Singapore, Christmas is a popular public holiday and festive occasion, with **44%** of Singaporeans shopping for this seasonal event. China and Indonesia registered the lowest levels of Christmas shoppers in the last 12 months with **21%** and **20%** respectively.

Christmas - % who shopped for this event in last 12 months by country



Q: Which of the following seasonal events have you shopped for in the last 12 months?



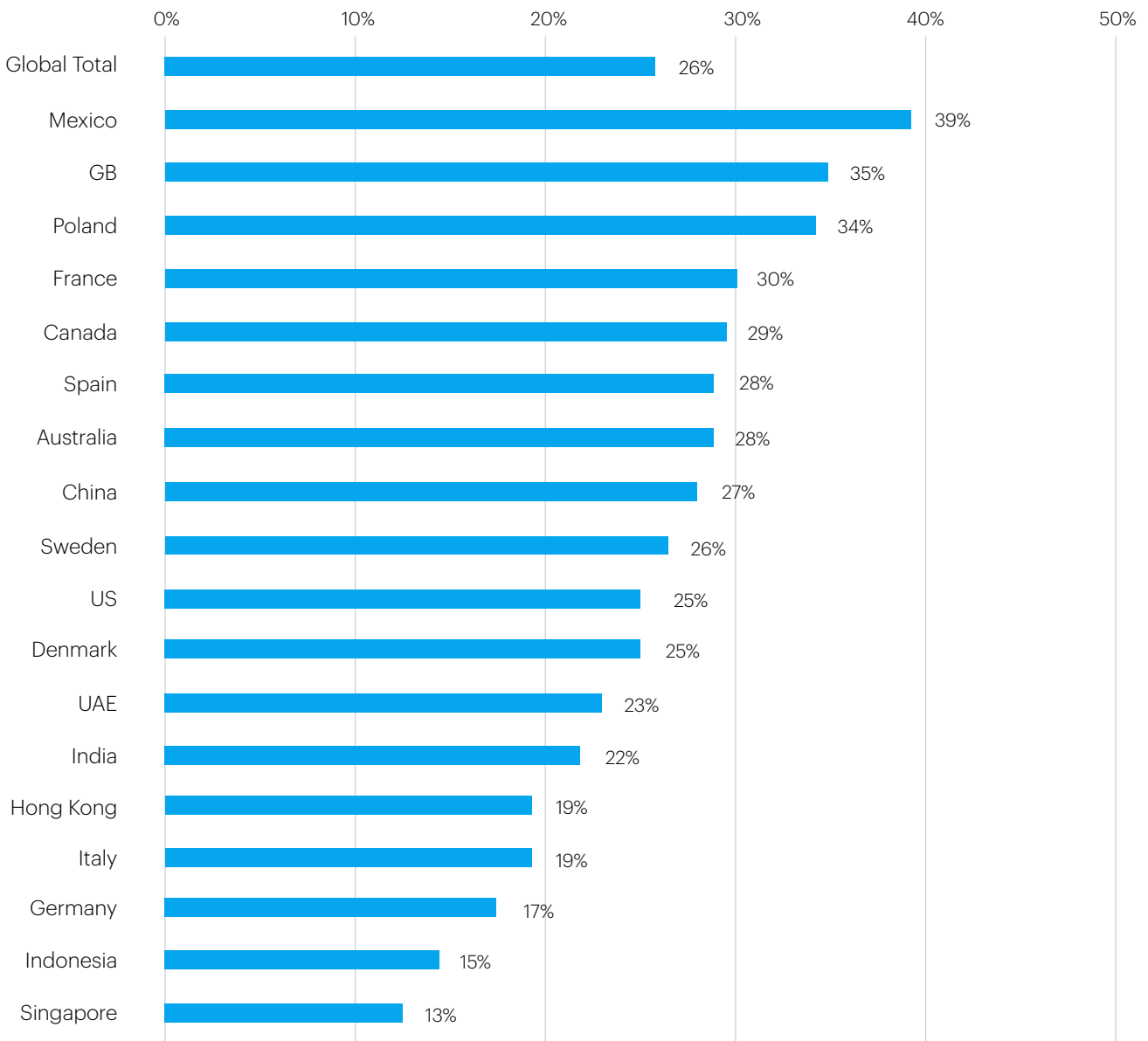
Four in ten Mexicans shopped for Mother’s Day or Father’s Day

Mother’s Day or Father’s Day is a family celebration, and the second biggest seasonal shopping event globally behind Christmas. The mix of countries shopping for this seasonal event varies with all regions appearing in the top ten. Among the **18** international markets survey, Mexico has the largest proportion of consumers who shopped for Mother’s Day or Father’s Day in the last 12 months (**39%**). In Mexico Mother’s

Day or El Dia de la Madre is seen as a day not only to honour the huge role mothers play in everyone’s lives, but also an opportunity to gather the family together. GB registered the second highest score for Mother’s Day or Father’s Day (**35%**) and is the only country in EMEA where this family occasion ranks second, behind Christmas.

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Mother’s Day or Father’s Day - % who shopped for these events in last 12 months



Q: Which of the following seasonal events have you shopped for in the last 12 months?



Black Friday or Cyber Monday beat Prime Day shopping globally

Characterised by steep, ‘must-grab’ discounts and offers, seasonal shopping events have disrupted traditional holiday shopping, with consumers holding off their purchases to seize deals offered during sales events. Whilst Amazon Prime Day strongly challenges Black Friday or Cyber Monday in Western markets, Alibaba-introduced Singles’ Day has grown into an enormous ‘shopping festival’ in Asia – expanding from its roots as a day branded to celebrate singledom.

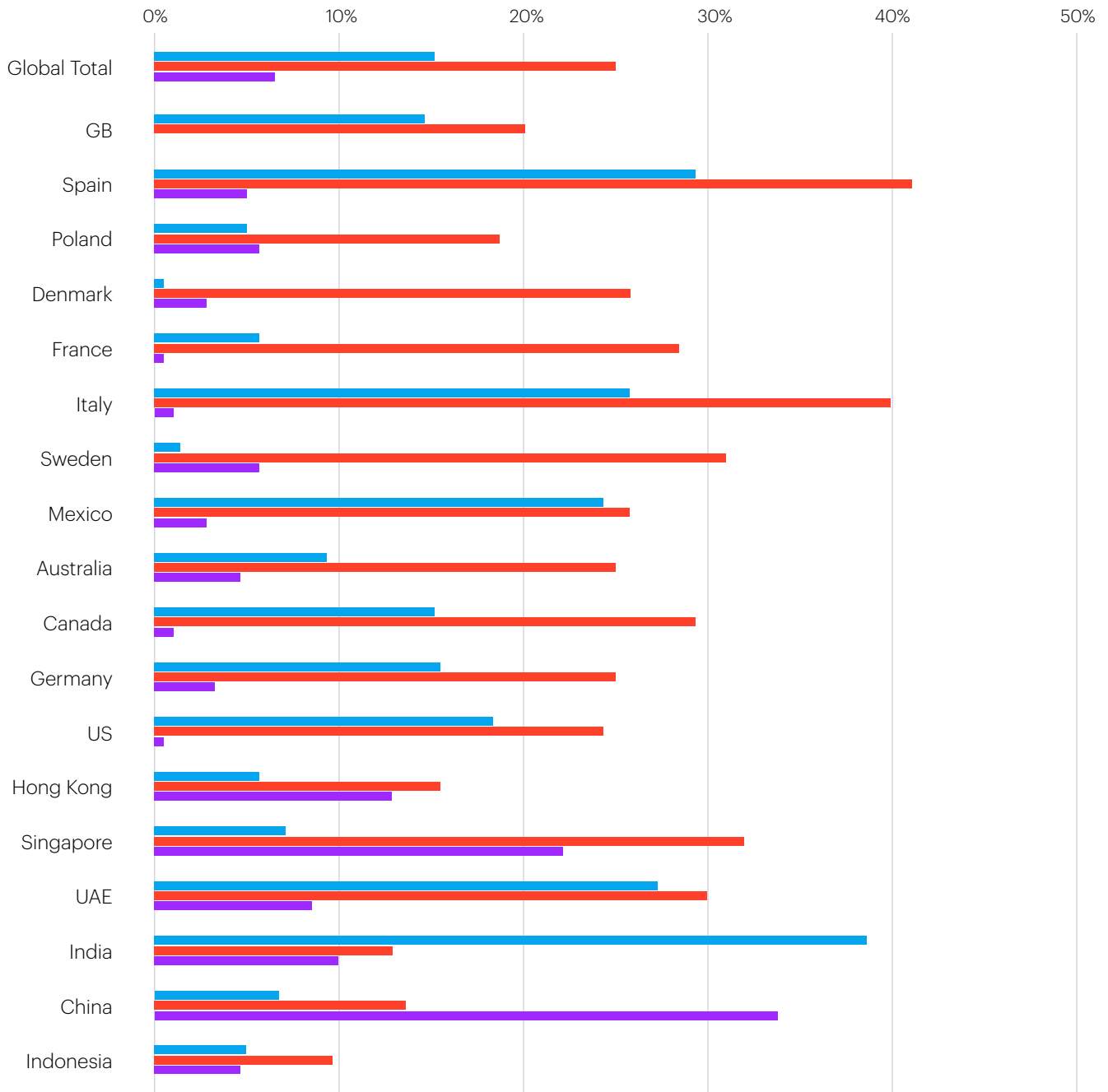
YouGov data reveals key insights on the popularity of shopping sales events across different markets. Among all the 18 markets surveyed, with the exception of India where Amazon Prime Day takes a clear lead, consumers are more likely to shop for Black Friday or Cyber Monday than

Prime Day. Even as Amazon and its brand partners offer exclusive products and discounts during Prime Day, extensive retailer participation makes Black Friday or Cyber Monday much larger in scale, comprising both in-store and online offers.

Looking at distinct markets, leading markets for shopping sales events included Spain for Black Friday or Cyber Monday (**41%**), India for Amazon Prime Day (**38%**) and Alibaba’s home market China for Singles’ Day (**33%**). Even as Singles’ Day evolves as a global shopping festival, participation from Western markets remains low. Less than **5%** of consumers in Spain, Germany, Italy, and France shopped for Singles’ Day in the last 12 months.

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Shopping sales events - % who shopped for each event in last 12 months by country



● Amazon Prime Day ● Black Friday or Cyber Monday ● Singles' Day

Q: Which of the following seasonal events have you shopped for in the last 12 months?

SALE

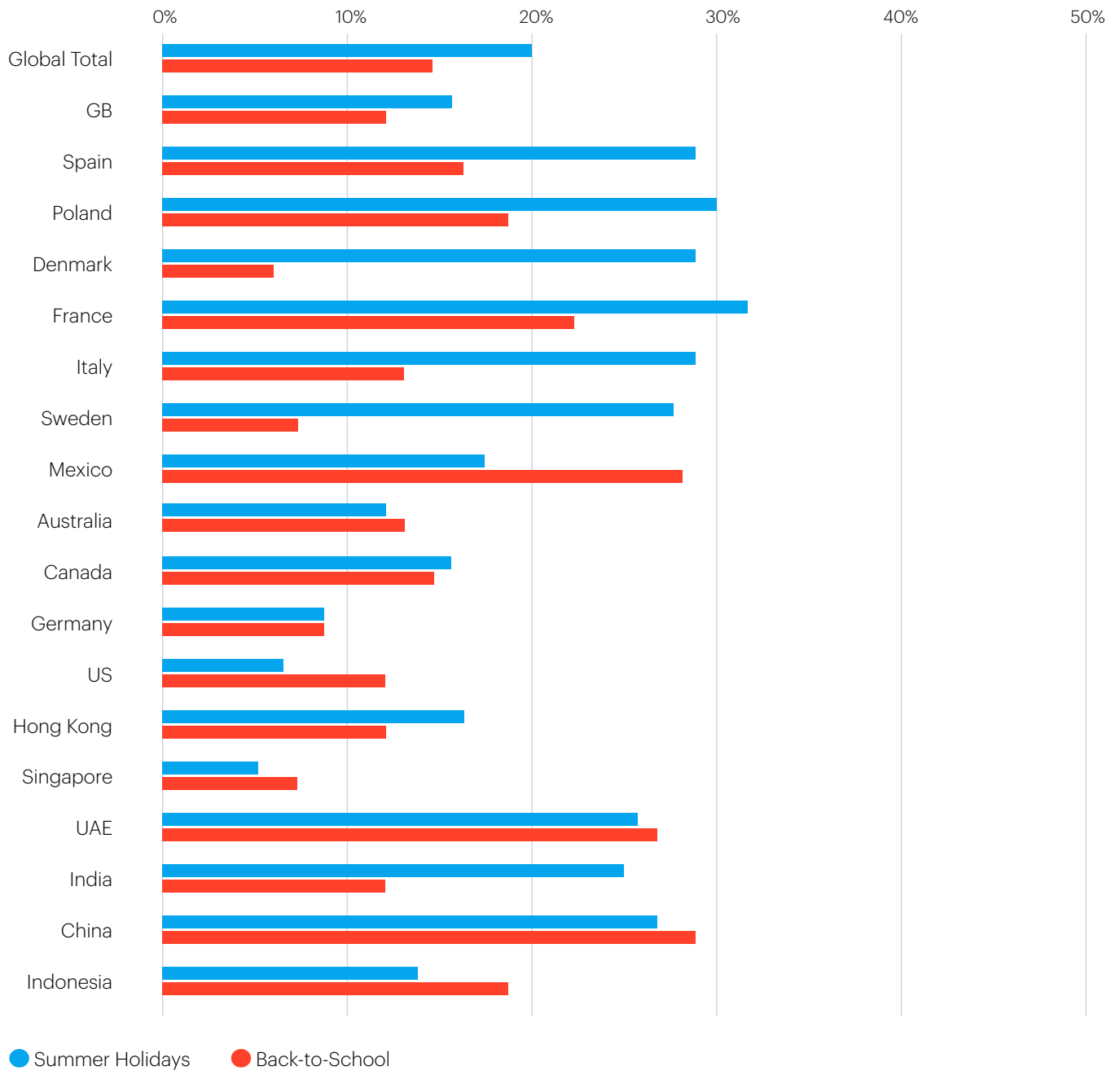


French consumers take the lead for Summer Holidays shopping

In 2021, consumers gradually started to return to in-person activities as the vaccination rollout ramped up and lockdown restrictions eased. YouGov data shows that vacations/holidays were back on consumers' plans, especially in Europe. Maintaining France's reputation for extended Summer Holidays in August, French consumers (**32%**) shopped for Summer Holidays the most in the last 12 months, followed by Poles (**30%**), and Danes (**29%**).

Turning to Back-to-School shopping, after significant periods of school closures around the world, children were back in classrooms in 2021, but what did Back-to-School shopping look like by market? YouGov data shows that in the last 12 months, about three in ten (**29%**) Chinese consumers shopped for education purposes to prepare their children for a return to school, the highest among 18 international markets surveyed. Additionally, over a quarter of parents in Mexico (**28%**) and the UAE (**27%**) shopped during the Back-to-School shopping season.

Summer Holidays and Back-to-School - % who shopped for these events in last 12 months by country



Q: Which of the following seasonal events have you shopped for in the last 12 months?



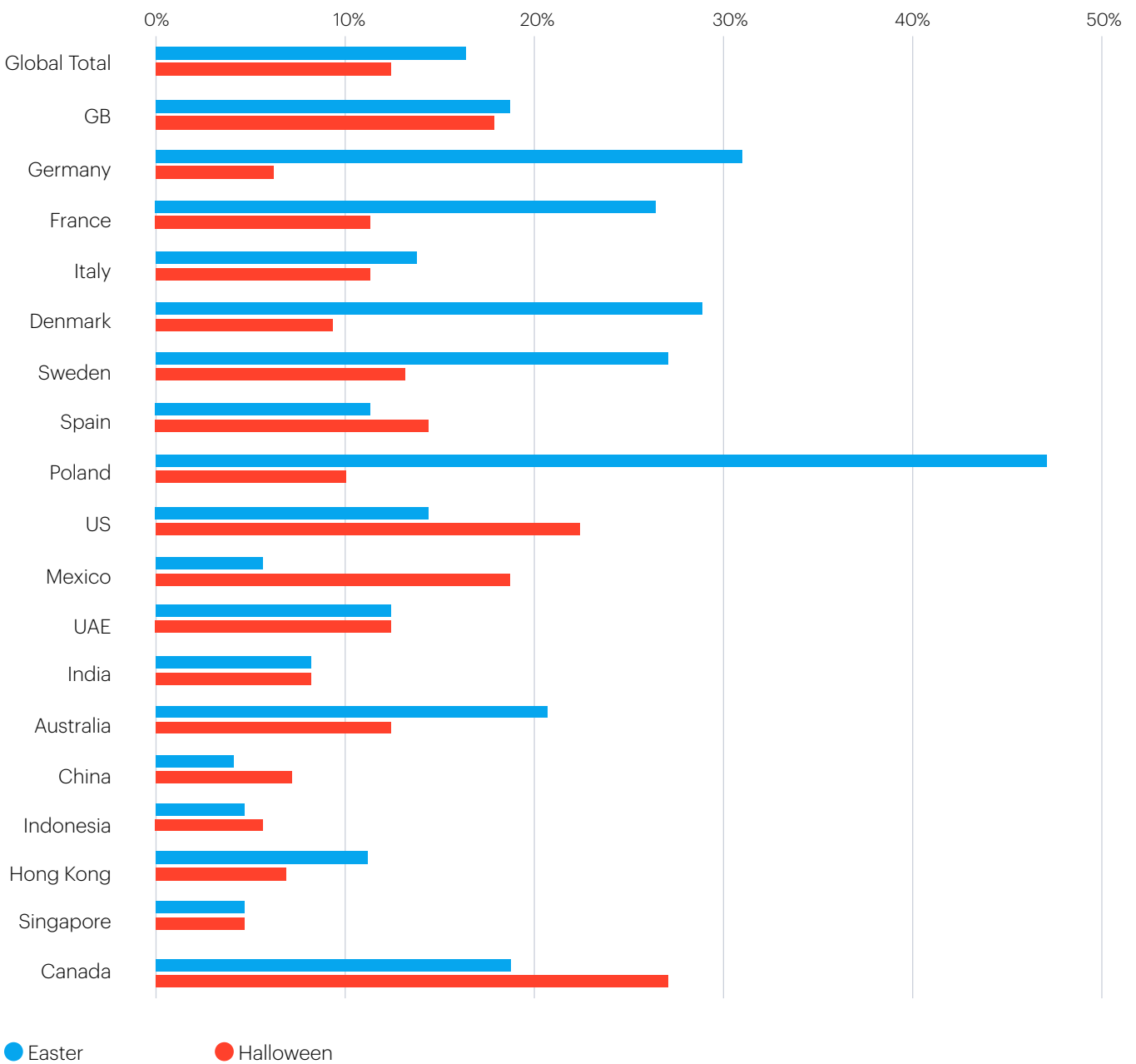
More Canadians trick or treated for Halloween than Americans

Next, we look at shopping for Halloween and Easter in the last 12 months – two popular festivals celebrated with zest and fun activities. YouGov data shows that in the last 12 months, among the 18 international market surveyed, Canadians shopped for Halloween the most, surpassing even their US counterparts. GB and Spain were the top two European markets for Halloween

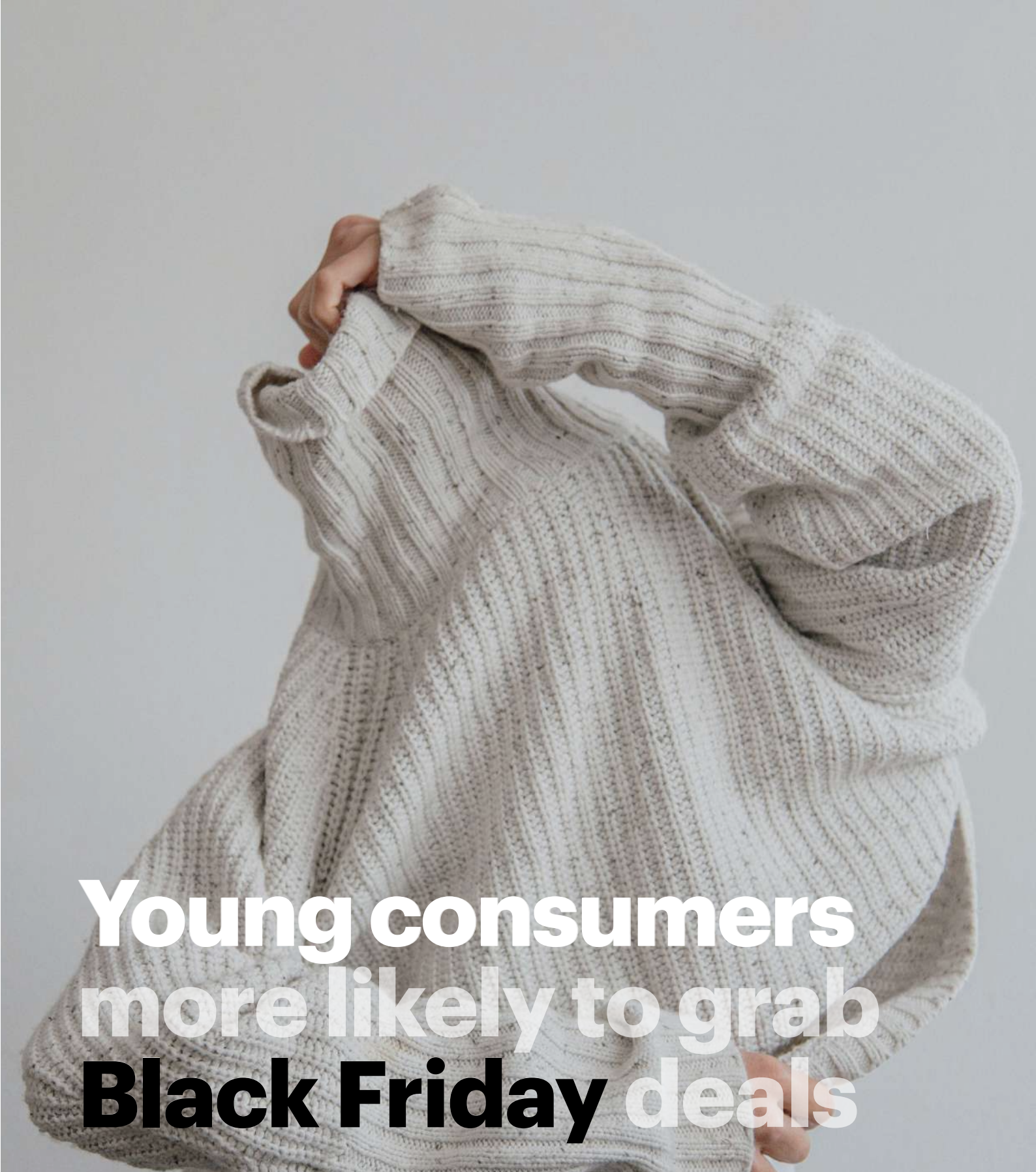
shopping, whilst the popularity of Halloween remains low in Asia. Less than **10%** of consumers shopped for Halloween in Hong Kong, India, and China. As for Easter, Poland registers the highest proportion of Easter shoppers (**47%**), followed by Germany (**31%**).

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Halloween and Easter - % who shopped for these events in last 12 months by country



Q: Which of the following seasonal events have you shopped for in the last 12 months?



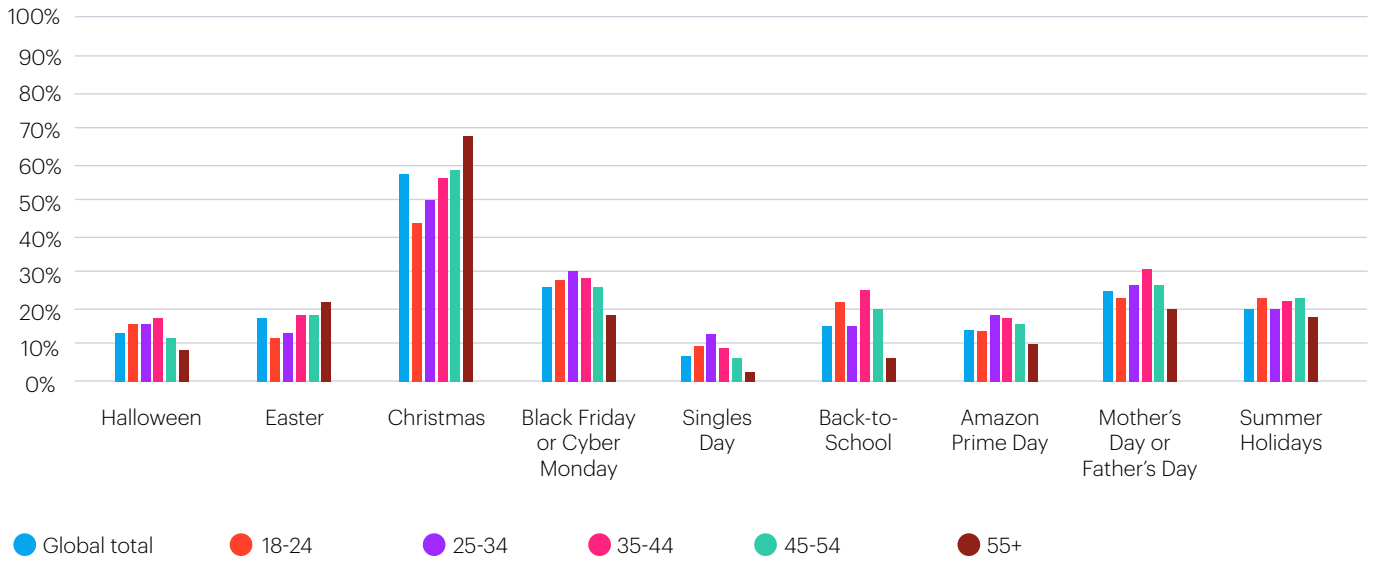
Young consumers more likely to grab **Black Friday** deals

YouGov Custom Research reveals that shopping for seasonal events varies by age group. For example, whilst **67%** of global consumers aged 55+ have shopped for

Christmas in the last 12 months, this dropped to **44%** among consumers in the 18-24 age group.

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Seasonal events shopped for in the last 12 months by age (Global)



Q: Which of the following seasonal events have you shopped for in the last 12 months?

On the other hand, younger consumers are more likely to be driven by bargain hunting, and shop for bumper sales events such as Black Friday or Cyber Monday, and Amazon Prime Day. Three in ten global consumers aged 25 to 34 have shopped for Black Friday or Cyber Monday sales events in

the last 12 months, compared to only **18%** among those aged 55+. Likely driven by parental life stages, about a quarter of the consumers in the 35-44 age group (**24%**) shopped for Back-to-School and **17%** for Halloween, and this is higher than any other age group.

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Section 3

Purchasing process for seasonal events

In this section we will delve into the purchasing behavior of global seasonal event shoppers using **YouGov Custom Research** data. We will explore the shopping planning process associated with each event, reveal what products and services seasonal shoppers have purchased, and who for, how their spending patterns changed in the lead up to each event, and the sources global shoppers use to inspire their buying decisions.



Planning for events

Monitoring consumer purchasing patterns and activating marketing activity around seasonal events is key to helping retailers and FMCG brands alike boost sales throughout the year. Timing is one of the most crucial elements of seasonal marketing and understanding consumer planning timings around events enables organizations to plan ahead and ensure that there will be enough stock available for the duration of the event. Forward planning also allows marketers to plan and optimise their marketing activity, and create relevant, targeted promotions that align with seasonal moments.

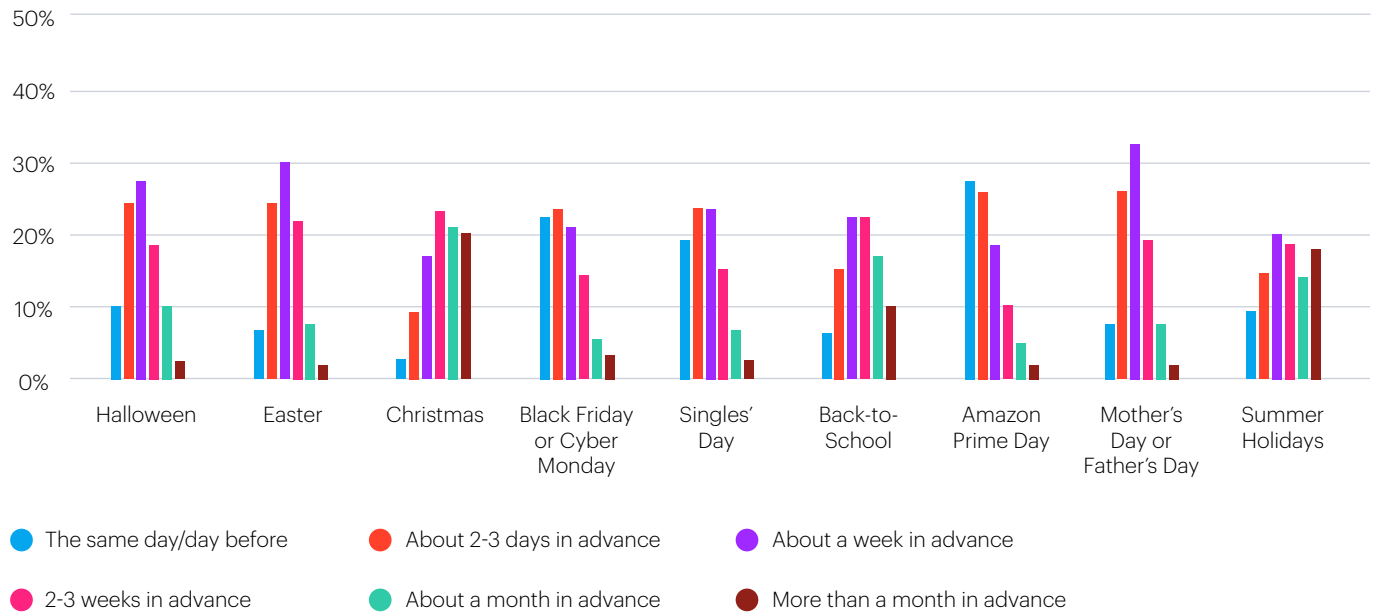
Understanding the shopping planning process around events is important, and the length of time consumers spend planning their shopping varies dramatically for different seasonal occasions. Christmas is the busiest time of year for many FMCG brands and retailers and targeting consumers at the right purchase time is critical. Many retailers and FMCG organizations enjoy a rush of Christmas gift sales as consumer's focus their attention on family, rather than work. For some consumers, it's never too early to start thinking about their Christmas shopping, since getting the task of Christmas gift shopping out of the way early, leaves them with more time to spend with the family.

Christmas is the most planned seasonal event

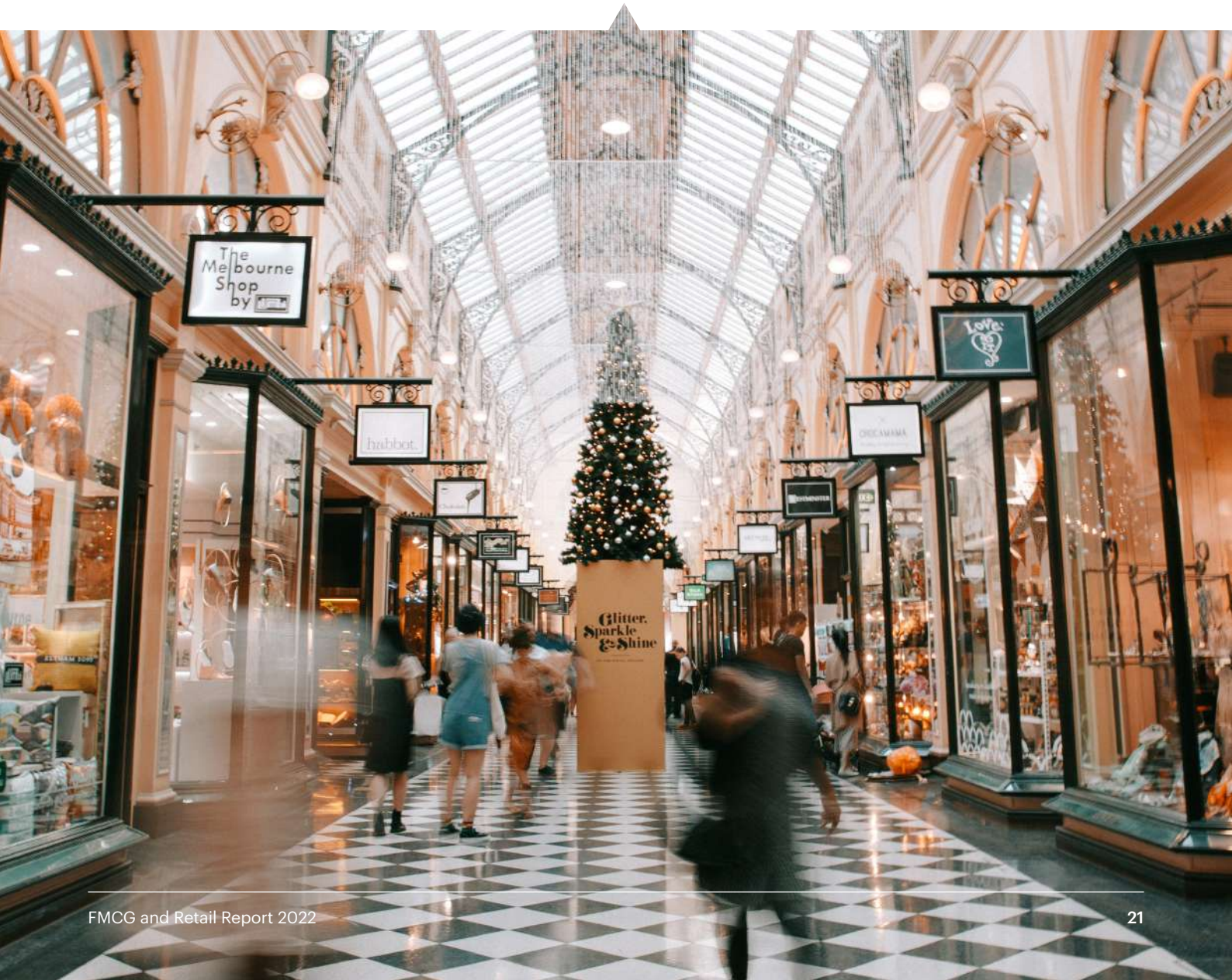
Christmas involves more forward planning for shopping than any other seasonal event. **YouGov Custom Research** shows that **41%** of global Christmas shoppers are in the Christmas

buying mood at least a month before the big day with almost two thirds (**65%**) planning their purchases at least two to three weeks in advance.

Purchase planning for seasonal events (Global)



Q. Thinking about purchasing for this event, how far in advance did you plan your purchases in the lead up to this event?



Our research also reveals that five in ten (**51%**) of Mother's Day or Father's Day global shoppers plan their purchasing about one to three weeks in advance of the event, with almost a third (**32%**) planning the week before. Only **3%** plan their Mother's Day and Father's Day purchases more than a month in advance. Halloween and Easter have similar shopping planning periods to these parental festivals, with over **70%** of global shoppers planning their purchases between 2 days and three weeks in advance.

Shoppers making purchases for all these events registered the highest proportion planning their purchases about a week in advance.

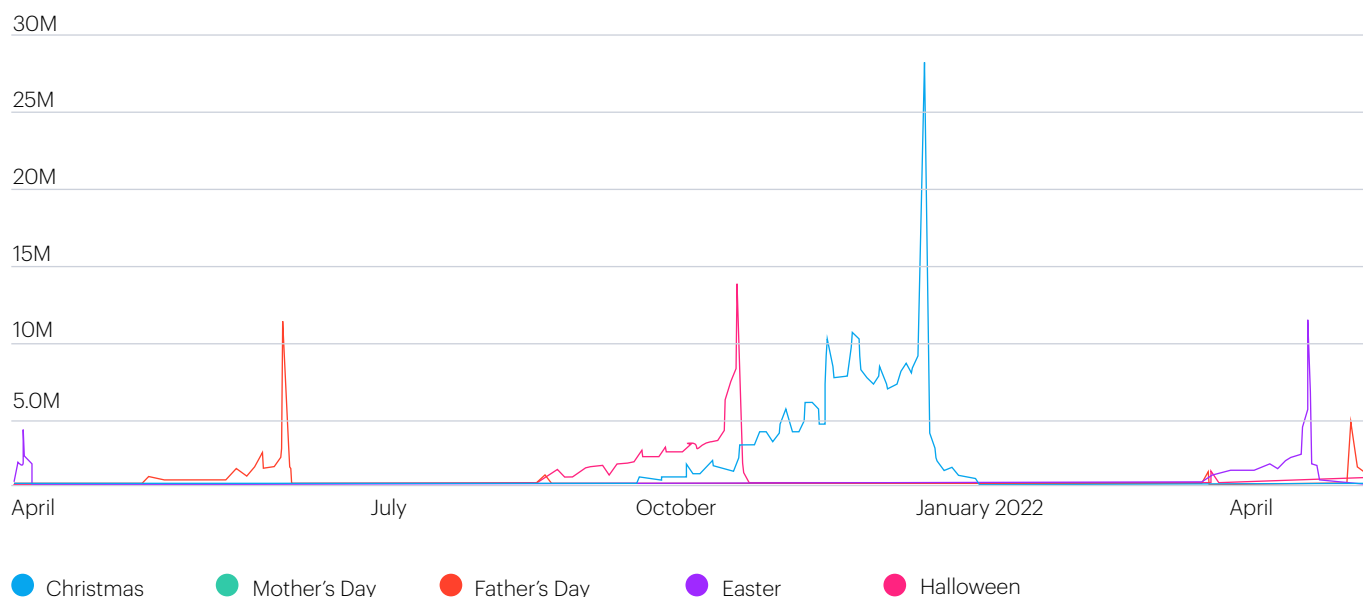
The Summer Holidays and Back-to-School are the next most popular events (after Christmas) for forward planning, with **27%** planning their Back-to-School purchases and **30%** planning their Summer Holiday purchases at least a month in advance.

Seasonal events searched (US)

Our **YouGov Custom Research** data is supported by data found in the US from our **YouGov Signal** platform, particularly looking at data based on daily online keyword searches for seasonal events. This tool aggregates many online metrics, including index search data for a host of topics, in addition to TV shows, brands, people and IP. Looking at seasonal events

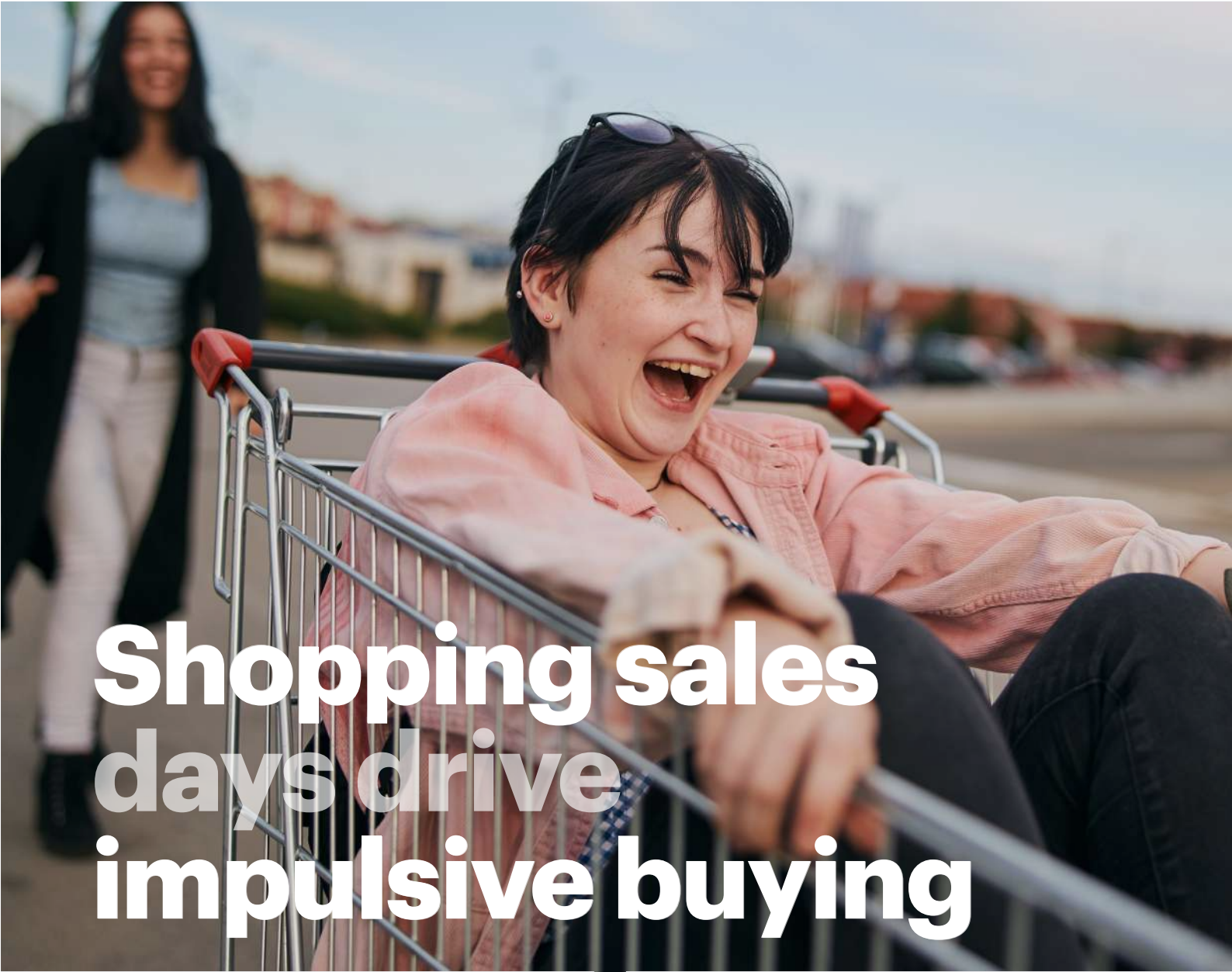
searched for in the US throughout the year, we see differences in daily online search volume for each event with Christmas leading the way. All events show a similar search pattern over time, with a steady increase in daily keyword search volume in the build-up to each event, culminating in a spike around the event itself, followed by a dramatic drop off immediately after.

Indexed Search Volume



Source: YouGov Signal





Shopping sales days drive impulsive buying

Shopping sales events can be a bonanza for consumers, retailers and FMCG brands alike. Two of the biggest sales events of the year are Amazon Prime Day and Black Friday. YouGov data shows that the planning period for Amazon Prime Day and Black Friday or Cyber Monday is quite similar, with the highest proportion of global shoppers planning their purchase either on the same day, or 2-3 days in advance.

Prime Day triggers a higher proportion of spontaneous planners/buyers than any other event, with **28%** planning their purchase on the same day or the day before, followed by Black Friday or Cyber Monday (**23%**) and Singles' Day shoppers (**20%**). On these sales days, shoppers expect great deals, and fast-moving inventory is more likely to attract these spontaneous buyers.

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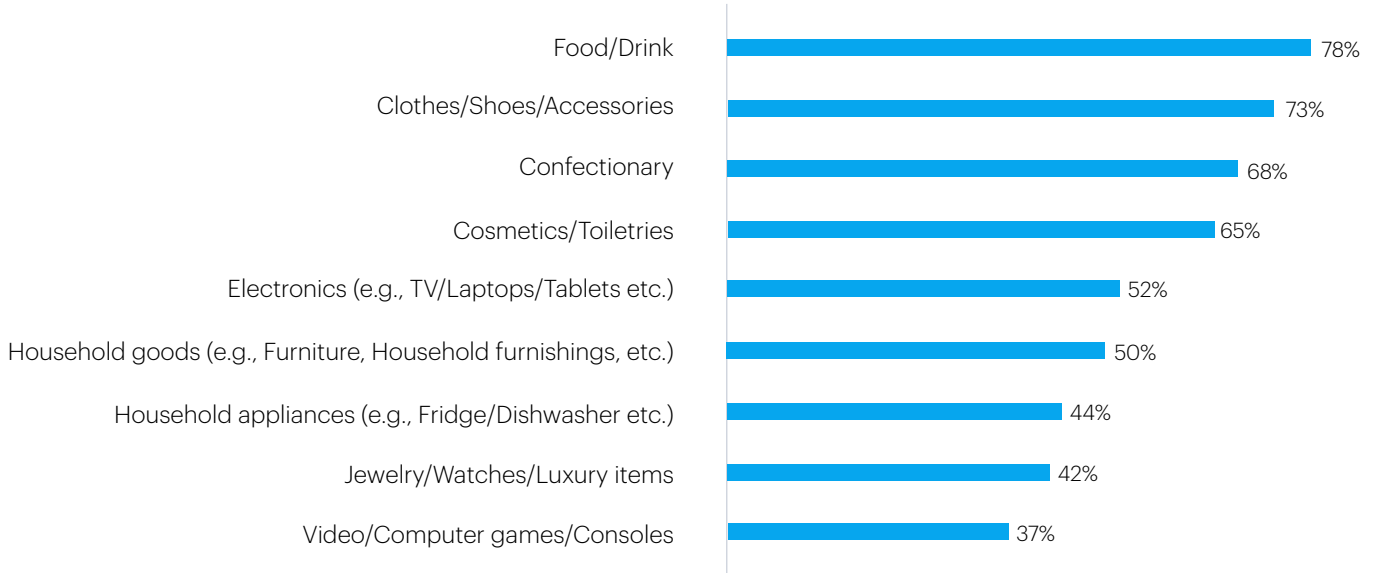
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Food and beverages are the most shopped for category

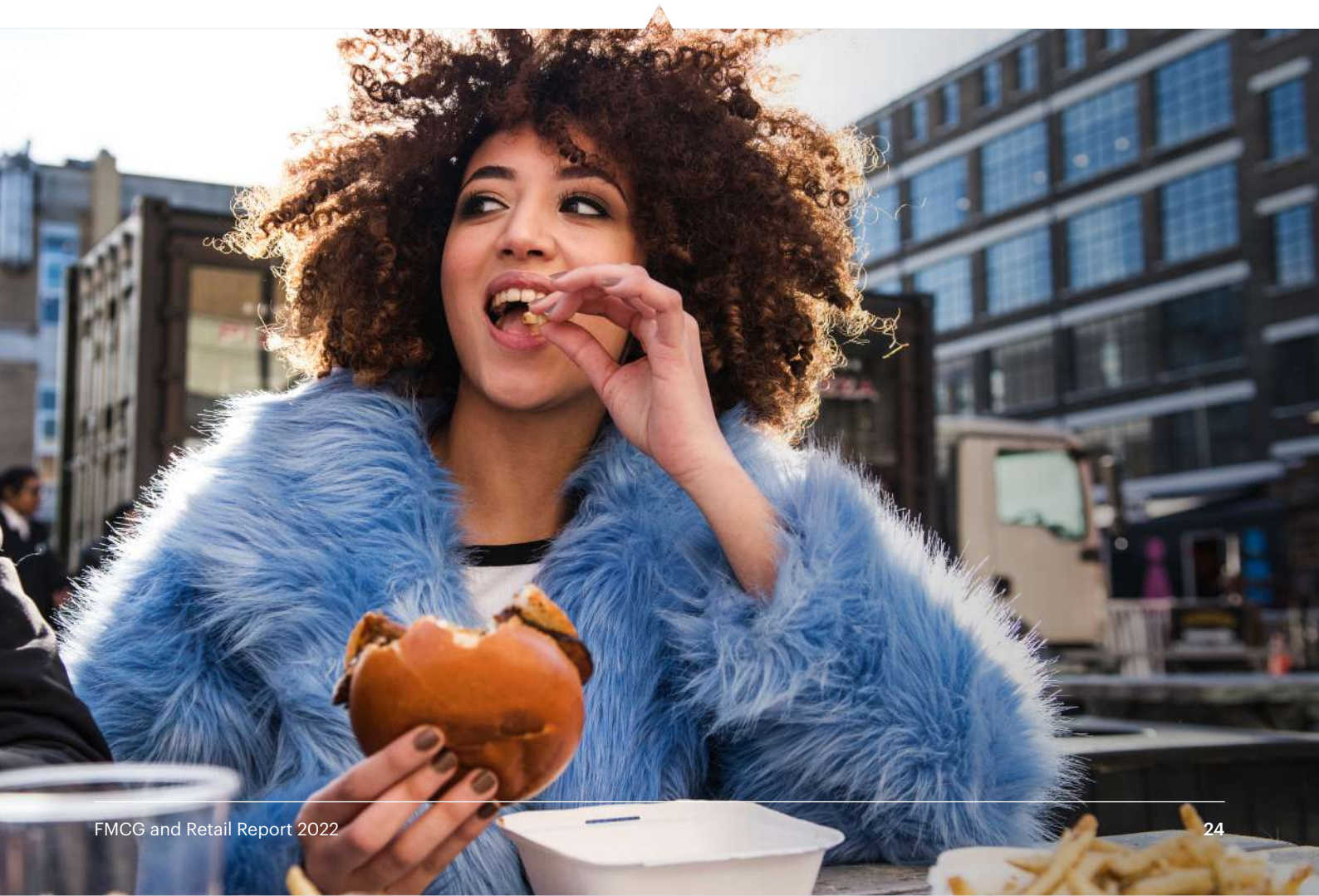
Looking at global purchasers for 'any seasonal event' in the last 12 months, not surprisingly, lower price items are the most likely to be purchased, with food and beverages

topping the category list among event shoppers (**78%**), followed by clothes, shoes, and accessories (**73%**), confectionary (**68%**), and cosmetics/toiletries (**65%**).

Products or services purchased for any seasonal event in last 12 months (Global)



Q. Thinking about your purchasing around this event, which of the following types of products or services did you purchase online, or in-store for this event?





Food and beverages take centre stage for almost all seasonal events

Looking at each seasonal event individually, what products and services are consumers purchasing, and are there any differences? Looking at global purchasers for each individual event in the last 12 months, food and beverages are the most popular choice for consumers shopping for family-oriented events, such as Christmas **(87%)** and the Easter break **(90%)**,

followed by confectionary (Christmas **71%** and Easter **85%**). These are the peak seasonal events for both food and beverages companies, and retailers targeting consumers indulging in festive treats, whilst celebrating special moments from home.

Products and services purchased by seasonal events in last 12 months (Global top three)

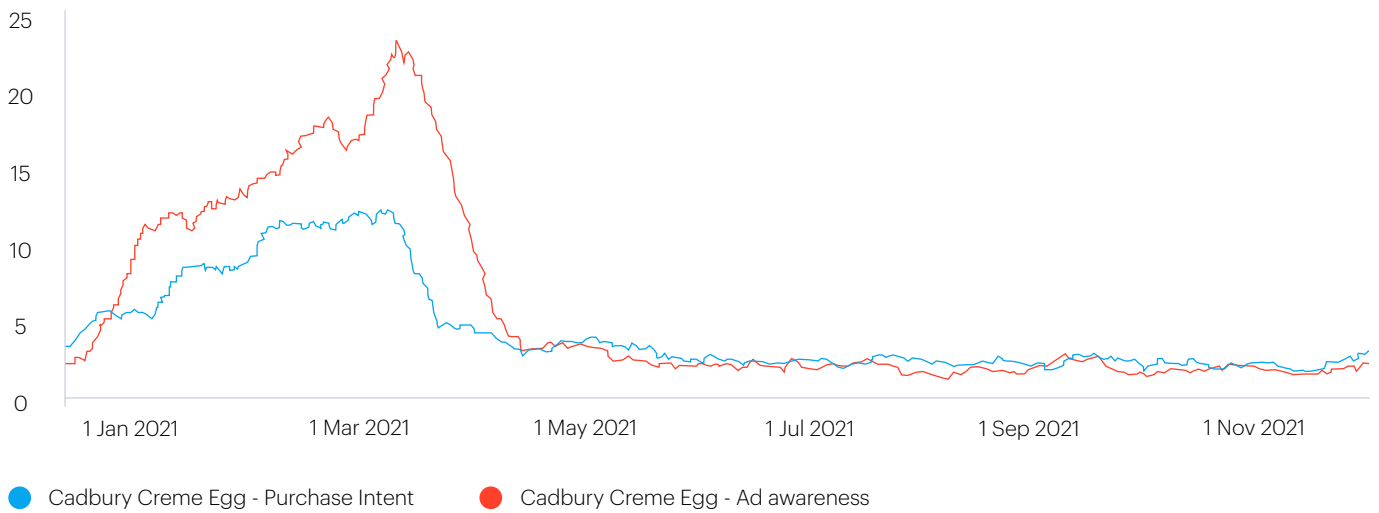
	1 st	2 nd	3 rd
Halloween	Confectionary (85%)	Food/Drink (84%)	Clothes, shoes, and accessories (69%)
Easter or Spring break	Food/Drink (90%)	Confectionary (85%)	Cosmetics/Toiletries (58%)
Christmas or Thanksgiving	Food/Drink (87%)	Confectionary (71%)	Clothes, shoes, and accessories (69%)
Black Friday or Cyber Monday	Clothes, shoes, and accessories (74%)	Electronics (62%)	Cosmetics/Toiletries (60%)
Singles' Day	Clothes, shoes, and accessories (83%)	Food/Drink (78%)	Cosmetics/Toiletries (77%)
Back-to-School	Clothes, shoes, and accessories (90%)	Food/Drink (77%)	Cosmetics/Toiletries (69%)
Amazon Prime Day	Electronics (75%)	Clothes, shoes, and accessories (75%)	Cosmetics/Toiletries (68%)
Mother's Day or Father's Day	Food/Drink (74%)	Confectionary (70%)	Clothes, shoes, and accessories (67%)
Summer Holidays	Clothes, shoes, and accessories (88%)	Food/Drink (88%)	Cosmetics/Toiletries (83%)

Q. Thinking about your purchasing around this event, which of the following types of products or services did you purchase online, or in-store for this event?

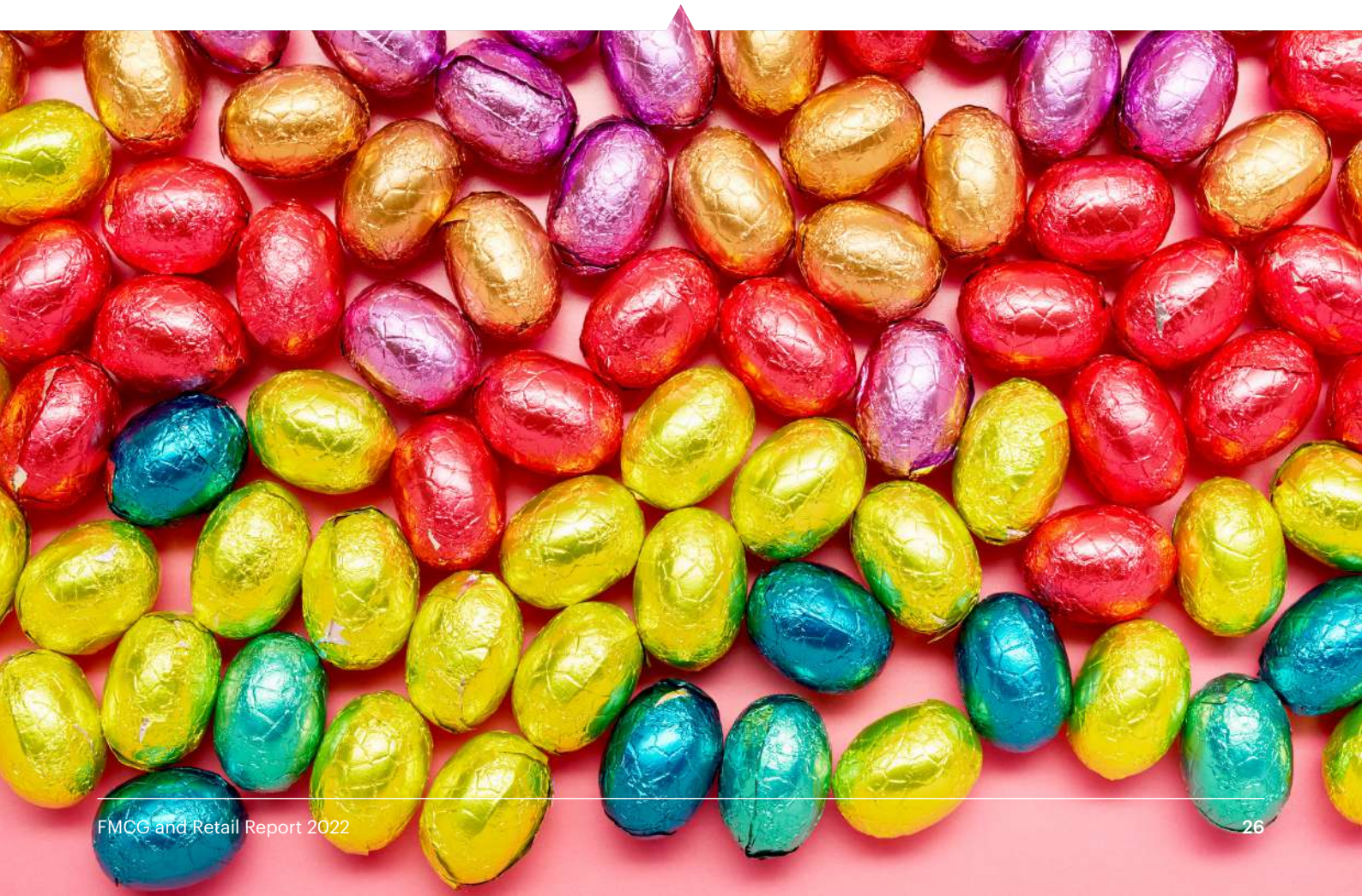
In many Christian countries, including Great Britain, the egg is a sign of 'rebirth', or 'the beginning', and is symbolic of the resurrection of Christ, it also ties in naturally with the festival of spring. In GB, children look forward to their dosage of chocolate eggs at Easter and Cadburys Creme Egg is a household favourite. **YouGov BrandIndex** UK data shows how Cadburys Creme Egg 'purchase intent' increased significantly

in the lead up to Easter in 2021, and then fell dramatically immediately after the Easter festivities. Similarly, ad awareness builds steadily and peaks sharply on April 3rd, 2021, the day before Easter Sunday, before falling steeply. Further analysis shows a very close relationship between advertising seen, and purchase consideration.

Purchase intent (UK moving 2-week average Jan-Dec 2021)



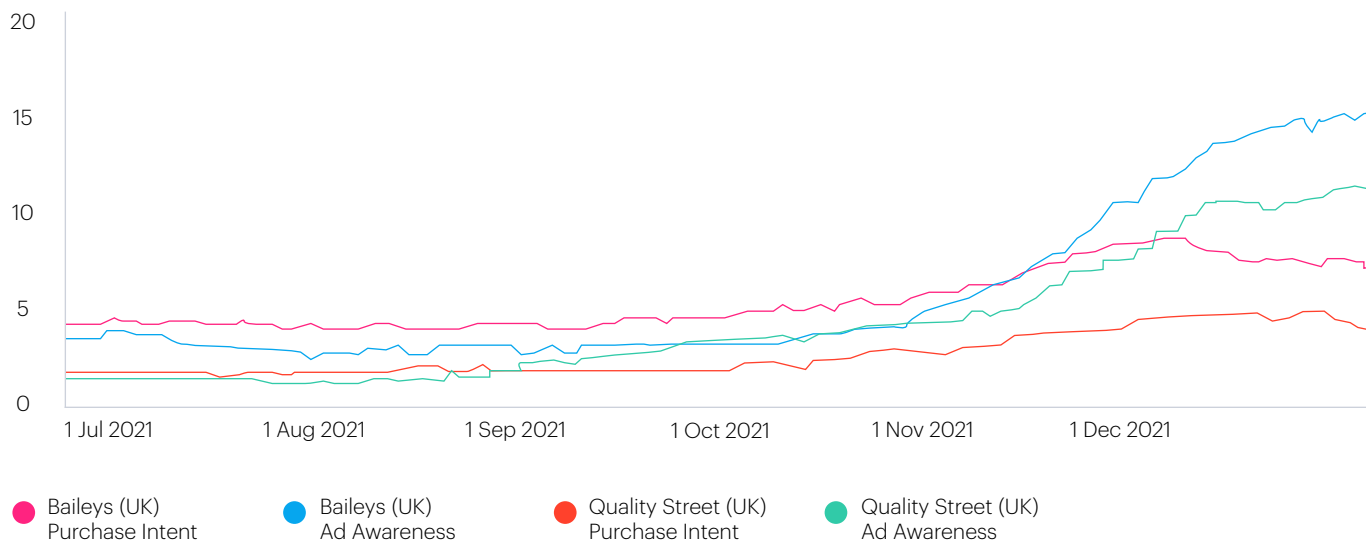
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We see a similar pattern with 'purchase intent' and 'ad awareness' in the build up to Christmas. Looking at data for Baileys, a popular Christmas liqueur among UK consumers, and Quality Street, a line of tinned and boxed toffees,

chocolates, and sweets, the results show 'purchase intent' and 'ad awareness' starts to build around 4-6 weeks prior to Christmas Day, aligning with our **Custom Research** findings.

Purchase intent (moving 4-week average Jul-Dec 2021)



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Using **YouGov BrandIndex** US data, we can also rank the brands that showed the most significant increases of ‘recent purchasers’ between November and December 2021, in the build up to Christmas. The results reveal a high proportion of

food, snacks, confectionary, and drinks brands, registering the highest month-over-month increases.

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Customer growth Nov-Dec 2021 (US)

Brand	Sector	December	November	Uplift
Nestlé Toll House	Food Brands	16.0	10.2	5.8
PlayStation	Audio/Visual	19.6	14.5	5.1
Nintendo	Video Game Publishers	16.5	11.7	4.8
Cheetos	Snacks	24.1	19.5	4.6
Sprite	Beverages	15.0	11.0	4.0
Chex Mix	Snacks	10.1	6.5	3.6
LG	Audio/Visual	30.4	27.0	3.4
Doritos	Snacks	29.7	26.4	3.3
Godiva	Food Brands	6.5	3.3	3.2
Head & Shoulders	Hair Products & Services	16.6	13.5	3.1
Ghiradelli	Food Brands	10.0	7.0	2.9
Coca-Cola	Beverages	24.5	21.6	2.8
Bud Light	Beverages	9.0	6.2	2.8



Candy is king for Halloween shoppers

Trick or treating is officially 'back on' as the pandemic looks to be easing, and Halloween is the only event in the last 12 months where more global shoppers have purchased confectionary **(85%)** than any other products or services. This is closely followed by food or beverages **(84%)**

enhanced by the surge in pumpkin purchases! Clothes, shoes, and accessories is the third most popular choice for Halloween shoppers as costumes, masks and decorations are added to the shopping list.



Apparel high on the list for Back-to-School and Summer Holidays

Back-to-School shopping is a busy time for children and parents alike, with new books, clothes, and stationery, high on most shoppers' lists. Not surprisingly, across the 18 international markets surveyed, clothes, shoes, and accessories are the main products purchased in the last 12 months for Back-to-School (**90%**) as parents seek out school essentials for their children. Types of companies or retailers

focusing their sales and marketing efforts on Back-to-School include apparel, stationary, and educational services. Holidaying abroad is back on the agenda with clothes, shoes, and accessories, the joint top scoring categories for the Summer Holidays alongside food and beverages (both **88%**), and cosmetics, or toiletries (**83%**).

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Sales days attract apparel, accessories, and technology shoppers

Shopping festivals and sales days such as Black Friday, Cyber Monday, Amazon Prime Day, and Singles' Day are highly popular among global bargain hunters and spontaneous buyers alike. They can also give both large and small retailers significant revenue lifts. Looking at the products purchased for key sales days in the last 12 months, **YouGov Custom Research** reveals that apparel, accessories, and technology,

dominate the purchasing agenda. Clothes, shoes, and accessories dominate Singles' Day (**83%**) and Black Friday or Cyber Monday (**74%**). Although Singles' Day attracted a lower proportion of global shoppers than any other event measured in the last 12 months, the range of items purchased for this event is more varied than any other, with high scores for all product categories.



Tech tempts on Prime Day

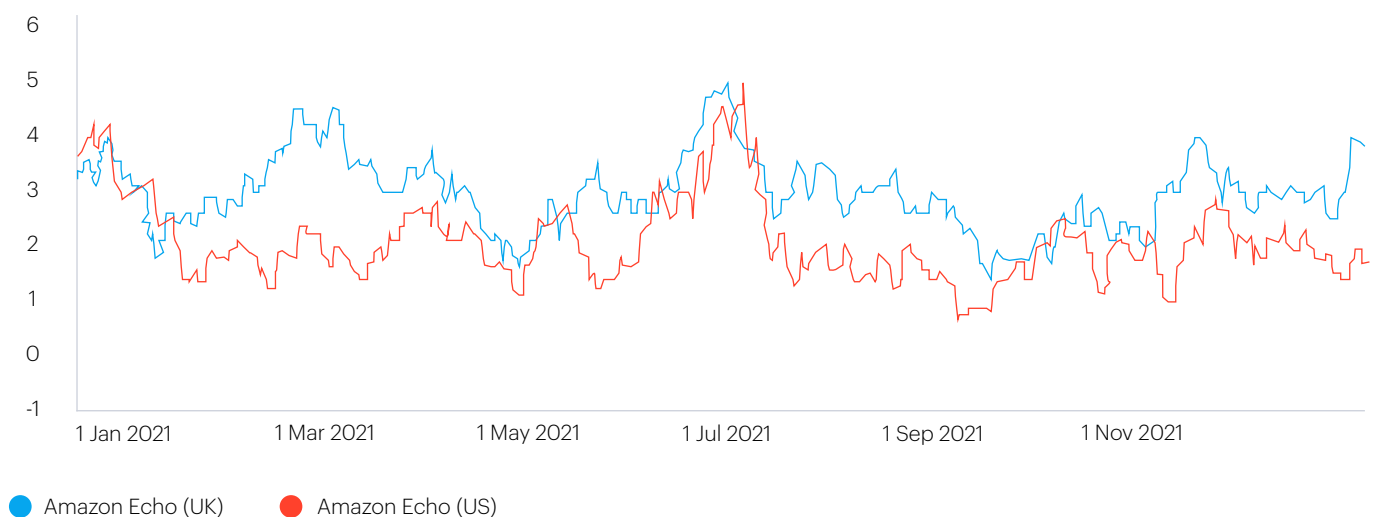
Generally, Amazon Prime Day is considered best for technology, with electronics the number one purchased product globally for Amazon Prime Day (**75%**). Amazon uses Prime Day as an opportunity to promote Amazon-branded items such as Amazon Echo, Fire Stick, and other products

owned by Amazon, and these are often discounted more heavily during Prime Day. Electronics is the second most popular category for Black Friday or Cyber Monday shoppers (**62%**), behind apparel and accessories (**74%**).

Looking at YouGov BrandIndex data in both the US and UK in 2021, the highest 'purchase intent' scores in both markets

occurred around Amazon Prime Day (June 21st to 22nd 2021).

Purchase intent in UK and US (moving 2-week average)

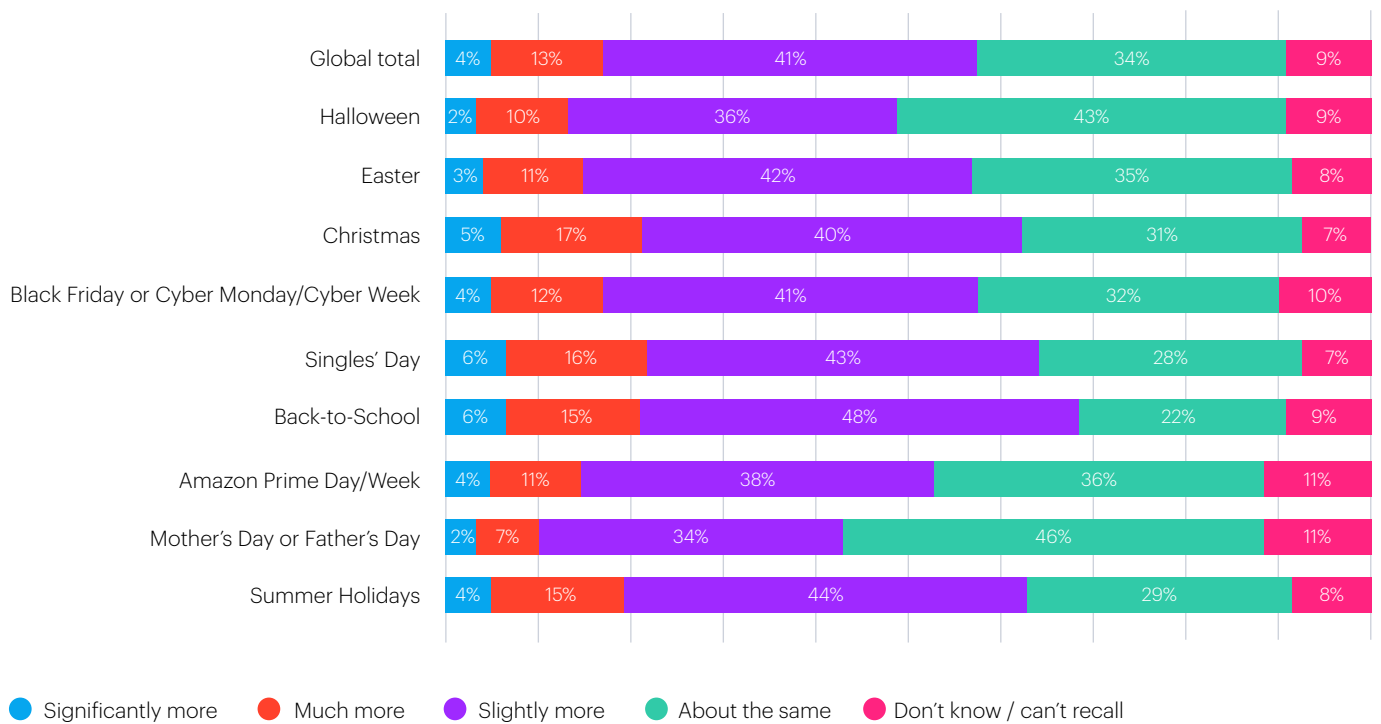


Expenditure for seasonal events

Looking at expenditure changes for seasonal events, **YouGov Custom Research** shows that **58%** of all global shoppers increased their expenditure for annual seasonal events over the last 12 months compared to their average monthly spend throughout the year, with **17%** increasing spend 'significantly more' or 'much more'. Christmas and Singles' Day registered the highest proportion of shoppers claiming to have increased spend 'significantly more' or 'much more' for this

event (**22%**), closely followed by Back-to-School (**21%**). On the other hand, Mother's Day or Father's Day and Halloween are least likely to encourage shoppers to increase spend. **43%** of Halloween shoppers and **46%** of Mother's Day or Father's Day shoppers in the last 12 months claimed that their spend for these two events remained about the same as their average monthly spend throughout the year.

Change in spend on products and services for seasonal events compared to average month (Global)



Q. Approximately how did your level of spend around each event change compared to your average monthly spend throughout the year?





The online and physical tug of war

The pandemic has reshaped how consumers engage with retail and the tug of war between physical and online shopping continues to dominate the FMCG and retail agenda. During the pandemic, global consumers significantly increased their online shopping, and for many, purchasing items online for seasonal events was their only option.

Welcoming customers back in-store has been one of retailers' top priorities and as the pandemic looks to be easing in many countries, we are seeing a return to physical shopping. To encourage more people onto the high street, retailers are working hard to engage seasonal shoppers in new ways and enhance the in-store shopping experience by providing entertainment, or immersive, interactive, and more visual experiences.

Many retailers and brands (particularly in the FMCG sector) are offering 'try before you buy', and some retailers are enticing shoppers with free wine while they shop!

Whilst consumers are returning to physical in-store shopping this year, the balance between physical and online shopping varies for seasonal shoppers depending on the type of products or gifts purchased. Brick-and-mortar continues to be the go-to method for purchasing everyday essentials such as food or beverages. Across the 18 international markets surveyed YouGov data shows that almost seven in ten global seasonal event shoppers of consumables (confectionary and food and drink) have purchased mainly in-store for their chosen events in the last 12 months, a fifth have opted for a combination of online and physical and only **10%** mainly online.

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Online and in-store purchasing for seasonal events in last 12 months (Global)



Q. Thinking about your purchasing around this event, which of the following types of products or services did you purchase online, or in-store for this event?





Increasing mix of online and in-store for discretionary items

Among global event shoppers, there is also a strong preference for ‘hands-on’ shopping for higher-ticket discretionary products such as clothing, furniture, and electronics. Almost half of global seasonal event shoppers of household goods (furniture, household furnishings etc.), household appliances (fridge, dishwasher etc.) have

shopped in-store for these items in the last 12 months. However, we start to see increased interest in a combination of in-store and online shopping for these discretionary goods, with **35%** of global events shoppers purchasing both online and in physical stores for household goods, and **34%** using both for household appliances.

Online and in-store purchasing for seasonal events in last 12 months (Global)



Q. Thinking about your purchasing around this event, which of the following types of products or services did you purchase online, or in-store for this event?

Global shoppers purchasing apparel, jewelry, watches, or other luxury products for seasonal events in the last 12 months show a similar mix of in-store and online purchasing to household items. **38%** of events shoppers have purchased clothes, shoes, or accessories mainly in-store, with **36%**

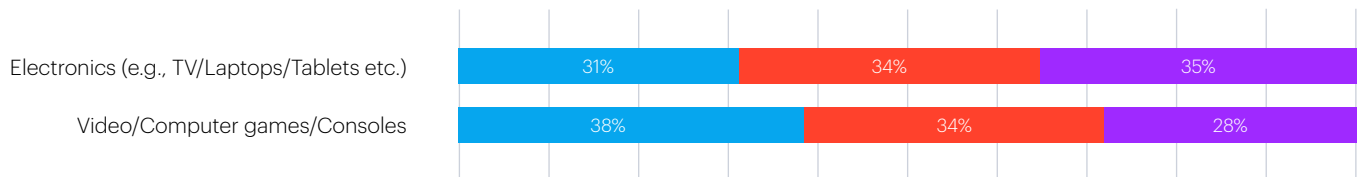
using a combination of both, and **26%** buying mainly online. On the other hand, almost half of global events shoppers purchasing jewelry, watches or other luxury products in the last 12 months shopped mainly in-store, with **31%** using a combination of both, and **20%** mainly online.



Electronics and gaming highest for online

Not surprisingly, seasonal purchasers of video, computer games and consoles are more likely to have purchased 'mainly online' in the last 12 months (**38%**) than buyers of any other product or service. This is followed by electronics with

31% of seasonal purchasers purchasing these items online. However, video, computer games and consoles is the only category where 'mainly online' purchasing is higher than 'mainly in-store'.



● Mainly online ● Both online and in physical store ● Mainly in-store

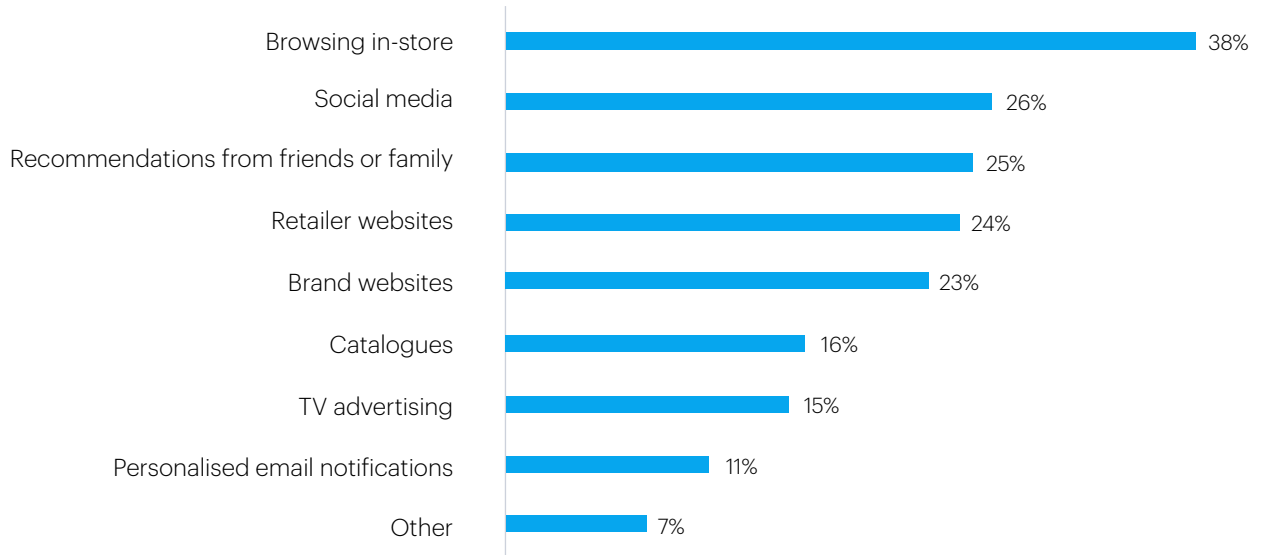
Q. Thinking about your purchasing around this event, which of the following types of products or services did you purchase online, or in-store for this event?

Browsing in-store inspires shoppers for seasonal events globally

Turning to sources used for inspiration when shopping for seasonal events, **YouGov Custom Research** data reveals that browsing in-store (**38%**) is the preferred source used

globally when shopping for seasonal events in the last 12 months. This is followed by social media (**26%**) and recommendations from friends or family (**25%**).

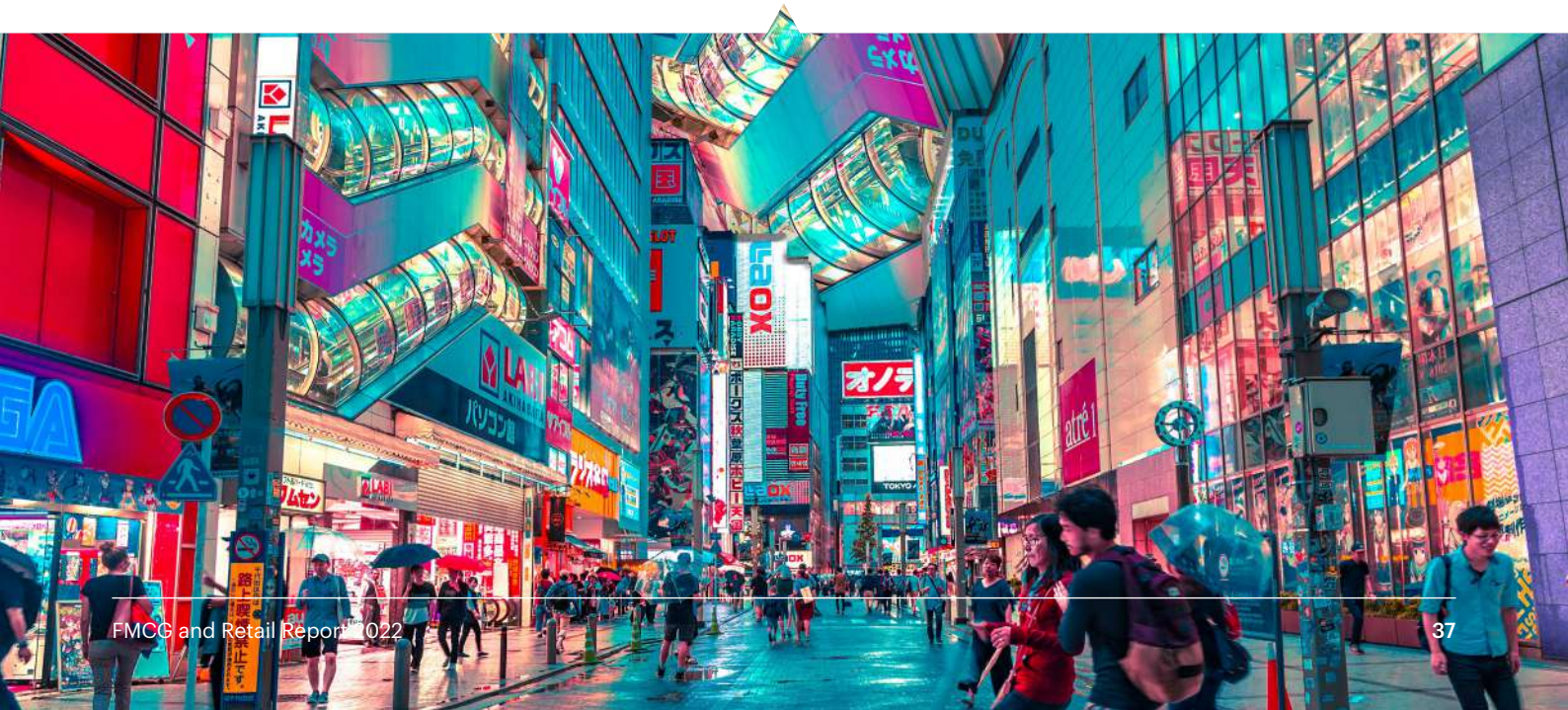
Sources used for inspiration when shopping for seasonal events (Global)



Q. Which of the following did you use to help get ideas/research on what to buy in the lead up to each event?

Among global shoppers, browsing in-store, and recommendations from friends or relatives are the top two sources used for inspiration in the lead up to family-oriented events such as Christmas, Mother’s Day, or Father’s Day, and Easter.

For the seasonal sales days, the mix of sources used for shopping inspiration is slightly different, with digital sources taking the lead. Global shoppers for Amazon Prime Day and Singles’ Day are most likely to have used social media for ideas in the lead up to the event (**30%** and **39%** respectively), whilst shoppers for Black Friday or Cyber Monday are most likely to turn to retailer websites (**36%**).



Sources used when shopping for seasonal events (Global top three)

	1 st	2 nd	3 rd
Halloween	Browsing in-store (41%)	Social media (32%)	Recommendations from friends or family (22%)
Easter or Spring break	Browsing in-store (48%)	Recommendations from friends or family (23%)	Social media (22%)
Christmas	Browsing in-store (40%)	Recommendations from friends or family (27%)	Retailer websites (22%)
Black Friday or Cyber Monday	Retailer websites (36%)	Brand websites (33%)	Social media (28%)
Singles' Day	Social media (39%)	Browsing in-store (34%)	Brand websites (33%)
Back-to-School	Browsing in-store (43%)	Recommendations from friends or family (26%)	Social media (24%)
Amazon Prime Day	Social media (30%)	Brand websites (29%)	Retailer websites (27%)
Mother's Day or Father's Day	Browsing in-store (37%)	Recommendations from friends or family (25%)	Social media (23%)
Summer Holidays	Browsing in-store (41%)	Recommendations from friends or family (32%)	Social media (31%)

Q. Which of the following did you use to help get ideas/research on what to buy in the lead up to each event?





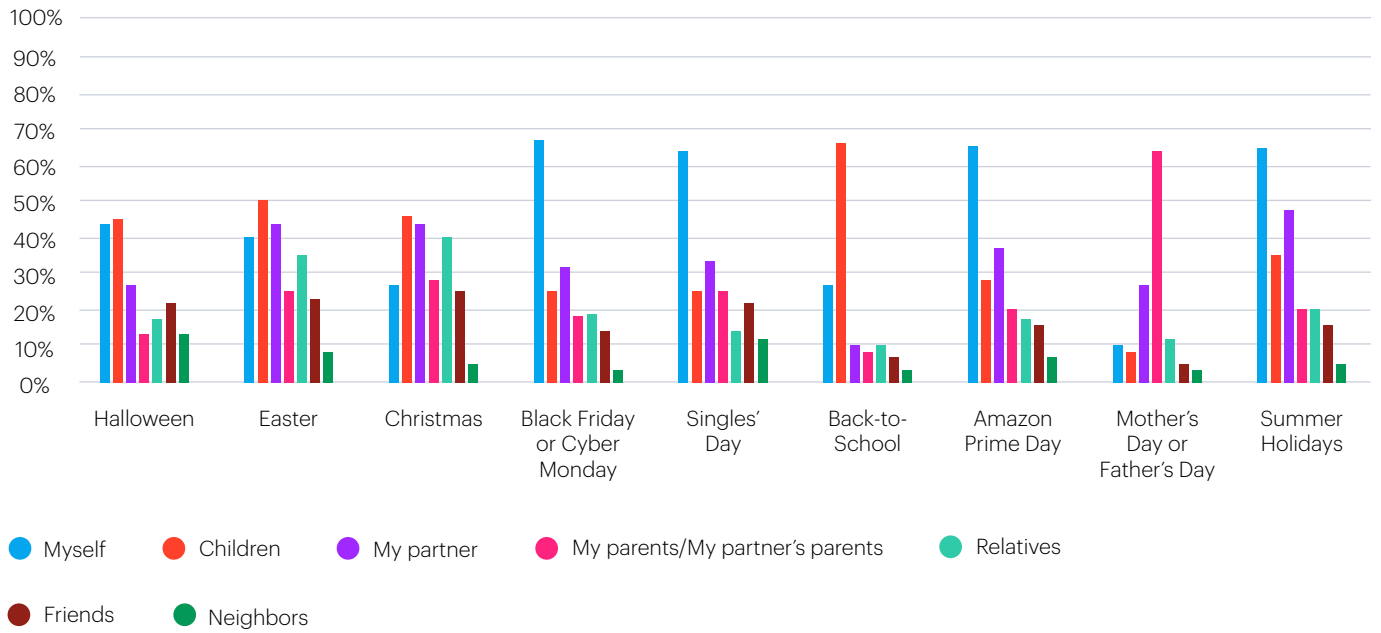
Who are **seasonal event shoppers** buying for?

When looking at who event shoppers are buying for globally, we see some significant differences for each event. Christmas is the most important day of the year for getting the family together, and family sharing. Consequently, across the 18 international markets surveyed, Christmas shoppers are more likely to purchase gifts for relatives on this festive

occasion (**41%**) than those shopping for any other event in the last 12 months. Not surprisingly, Mother's Day and Father's Day are by far the number one annual event globally for purchasing for parents, with **64%** purchasing for parents, or partner's parents, followed by Christmas (**29%**), Easter, and Singles' Day, both scoring **25%**.

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Who are seasonal event shoppers buying for? (Global)



Q. Thinking about what you purchased for this event, who did you buy for?

As expected, children are the top recipient group for Back-to-School shoppers (**66%**), but also highest for Easter (**50%**) and Halloween shoppers (**45%**). Shopping sales days and Summer Holidays register the highest proportion of events

where shoppers are buying for themselves. in the last 12 months, with Black Friday or Cyber Monday topping the list with **68%**, followed by Summer Holidays (**66%**), Amazon Prime Day (**65%**) and Singles' Day (**64%**).



► Summary

Seasonal events provide an excellent opportunity for retailers and FMCG brands to increase awareness and boost sales, and as we move into a post-pandemic world, it is more important than ever for marketers to understand the dynamics of seasonal shopping and the consumer purchasing process associated with seasonal events. Across the globe, shoppers celebrate different seasonal events in different ways, depending on tradition, culture, or learned consumer behavior.

Different products are purchased for different people depending on the seasonal event, and the planning process, and the amount spent also varies. The marketing touchpoints used to gather ideas and inspiration for seasonal events is mixed, and there are contrasts in the balance between online and in person shopping, depending on the seasonal occasion.

These are important factors to consider for retailers and FMCG brand marketers targeting global seasonal shoppers. This report reveals a series of key-highlights and insights for seasonal marketers based on YouGov data across 18 international markets:





Key findings

1 Sizing the Christmas opportunity – The most popular seasonal event

It's all eyes on Christmas for seasonal marketers since it's the busiest time of year for many FMCG brands and retailers. Christmas is the most popular seasonal shopping event in the last 12 months in 17 out of the 18 international markets surveyed, and in EMEA and the Americas, Christmas emerged as the clear winner in all markets. Almost six in ten (57%) global consumers have shopped for Christmas in the last 12 months. This is twice as high as Mother's Day or Father's Day, in second position (**26%**).

2 Country variations in celebrations

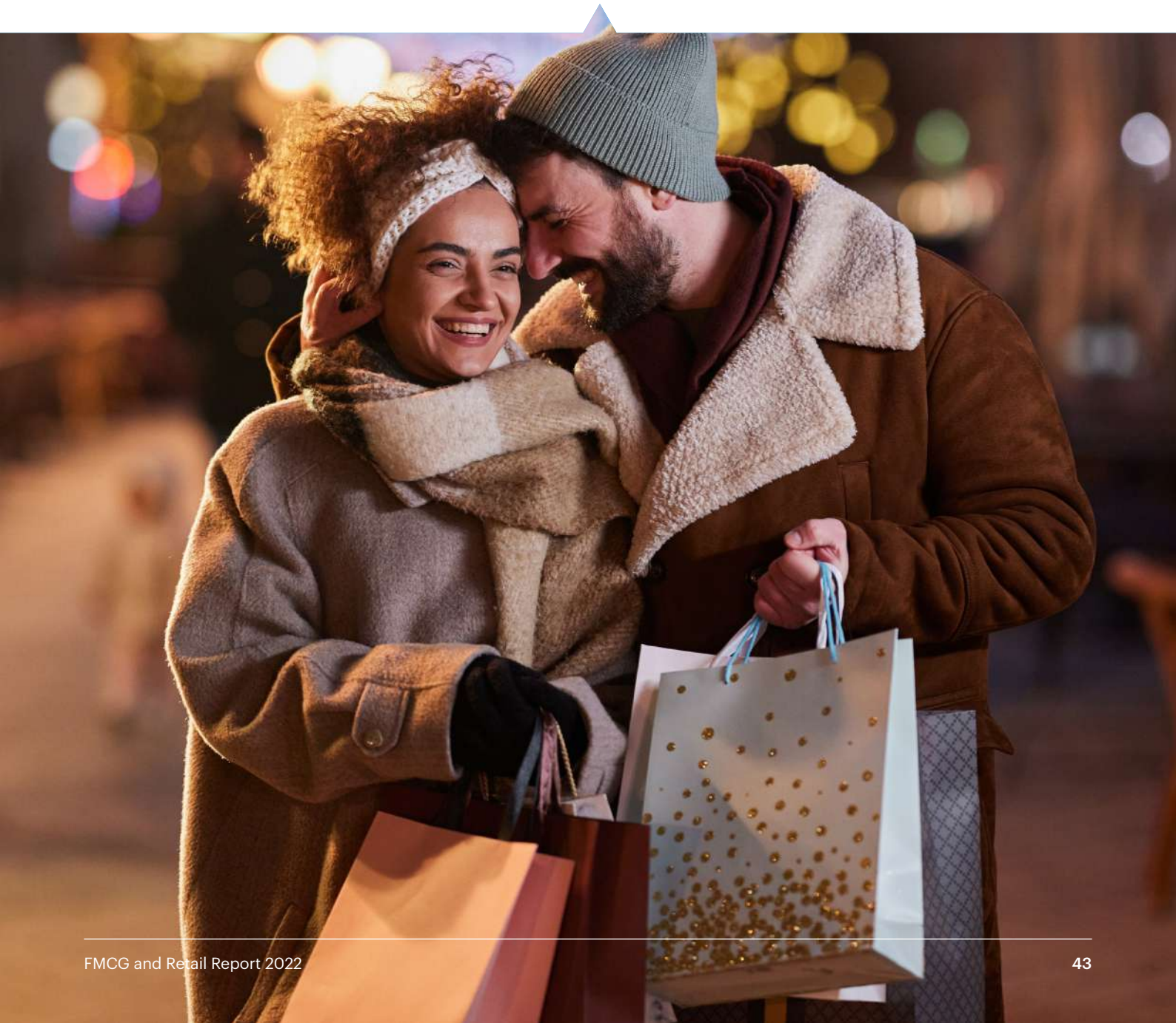
Almost all the key seasonal events have a different top scoring country in terms of percentage of shoppers. For Christmas, GB has the highest proportion of Christmas shoppers in the last 12 months (**76%**), whilst Mexico takes the lead for the second most popular global seasonal event, Mother's Day with **39%** of consumers shopping for this event. Turning to the seasonal sales days, China takes the lead for Singles' Day shoppers in the last 12 months (**33%**), whilst India takes pole position for Amazon Prime Day (**38%**). Spain dominates Black Friday or Cyber Monday with **41%** of Spaniards shopping for this seasonal sales occasion. Poland registers the highest proportion of shoppers for Easter (**47%**), whilst Canadians score highest for Halloween shoppers (**27%**), followed by the US (**22%**).

3 Timing is key for seasonal marketing

Each seasonal event attracts different types of consumers around the world, and time spent planning also varies for different seasonal occasions. Timing is one of the most crucial elements of seasonal marketing and understanding consumer planning duration around events enables organizations to promote their messages to potential buyers at the right time. Christmas is the most planned seasonal event with **41%** of global Christmas shoppers planning their gift purchases at least a month before the big day and almost two thirds (**65%**) planning their purchases at least two to three weeks in advance. On the other hand, the planning period for shopping sales days such as Amazon Prime Day and Black Friday or Cyber Monday is more spontaneous, with most global shoppers planning their purchase either on the same day, or 2-3 days in advance.

4 Following the seasonal wallet

It is important for retail and brand marketers to be aware of and quantify uplifts in consumer expenditure for seasonal events. Our research shows that almost six in ten global shoppers increased their expenditure for seasonal events in the last 12 months. Not only is Christmas the most popular seasonal event in terms of percentage of global shoppers, it also registers the joint highest in the proportion of shoppers claiming to have increased their spend 'significantly more' or 'much more' along with Singles' Day. On the other hand, Mother's Day or Father's Day and Halloween are the two events that are least likely to encourage shoppers to spend more than usual, likely due to lower ticket price items.





5 Different people for different seasonal events

When looking at who event shoppers are buying for globally in the last 12 months, we see some significant differences for each event. Christmas is the most important family day of the year, consequently, Christmas shoppers are more likely to purchase gifts for children, partners and relatives on this festive occasion. Not surprisingly, Mother's Day or Father's Day is by far the number one global event for purchasing for parents (**64%**). Children are not only the top recipient group for Back-to-School shoppers (**66%**), but also highest for Easter (**50%**) and Halloween shoppers (**45%**). Shopping sales events and Summer Holidays register the highest proportion of event shoppers buying for themselves in the last 12 months, with Black Friday or Cyber Monday topping the list (**68%**), followed by Summer Holidays (**66%**), Amazon Prime Day (**65%**) and Singles' Day shoppers (**64%**).

6 Seasonal category variations

FMCG brands and retailers need to understand the core categories shoppers are buying when shopping for seasonal events around the world, and how this varies for different events. Food and beverages are the most popular shopping choices for family-oriented events, such as Christmas (**87%**) and the Easter break (**90%**). Halloween is the only event in the last 12 months where confectionary (**85%**) tops the global shopping list. Not surprisingly, clothes, shoes and accessories are the main products purchased globally in the last 12 months for Back-to-School shoppers (**90%**) as parents seek out school essentials for their children.

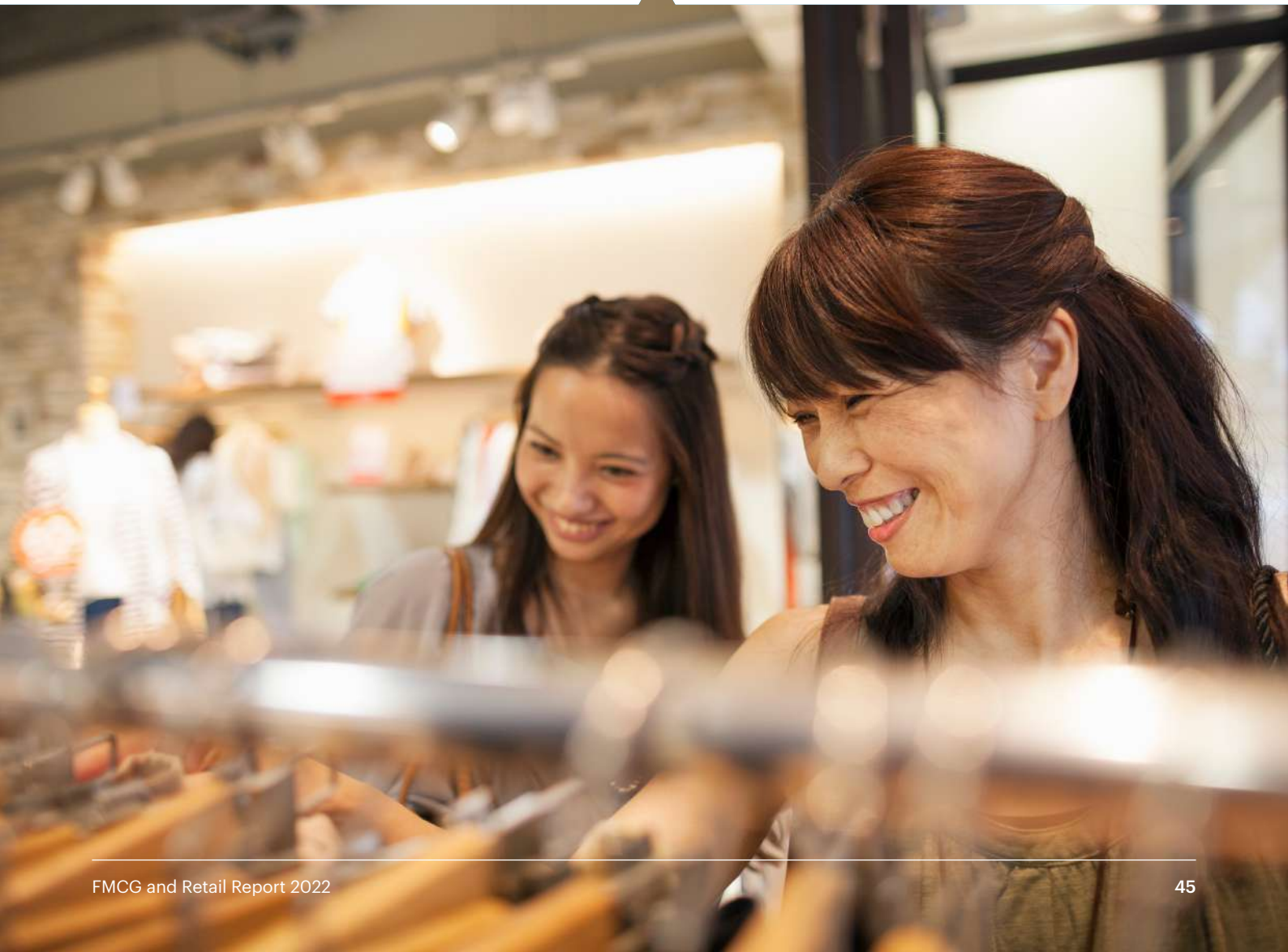
Apparel, accessories, and technology, dominate the purchasing agenda for shopping sale days, with clothes, shoes and accessories scoring highest for Singles' Day (**83%**) and Black Friday or Cyber Monday (**74%**). Electronics is the number one purchased category globally for Amazon Prime Day shoppers (**75%**).

7 Online and physical dynamics for seasonal event shoppers

The balance between in-store and online shopping varies for seasonal event shoppers depending on the type of products or gifts purchased. High street shopping continues to be the primary method for most products and services. Almost **70%** of global seasonal event shoppers of consumables (confectionary and food and drink) have purchased mainly in-store in the last 12 months. There is also a strong appetite for 'hands-on' shopping for higher-ticket products such as clothing, furniture, and electronics. However, we see an uplift in a combination of in-store and online shopping for these discretionary goods, with **35%** of global events shoppers using both online and shopping in physical stores for household goods, and **34%** using both when purchasing household appliances. Not surprisingly, more seasonal event shoppers who purchased video, computer games and consoles in the last 12 months used 'mainly online' sources (**38%**) than buyers of any other products or services. In addition, video, computer games and consoles is the only category where 'mainly online' purchasing is higher than 'mainly in-store'.

8 Seasonal consumer touchpoints

Looking at sources used for inspiration when shopping for seasonal events, various touchpoints emerged depending on the occasion. Overall, browsing in-store remains the primary global source for shopping inspiration among seasonal event shoppers (**38%**), followed by social media (**26%**) and recommendations from friends or family (**25%**). Among shoppers for family-oriented events such as Christmas, Mother's Day, or Father's Day, and Easter, the top two sources used for inspiration in the lead up to these events are more personal, with browsing in-store, and recommendations from friends or family the top scoring sources of inspiration. For the online sales days, global shoppers for Amazon Prime Day and Singles' Day are most likely to use social media for ideas in the lead up to the event (**30%** and **39%** respectively), whilst shoppers for Black Friday or Cyber Monday are most likely to turn to retailer websites (**36%**).



Methodology

The insights in this report are drawn from a recent global **YouGov Custom Research** survey exploring shopping and consumption behavior in relation to seasonal events. The survey exclusively focuses on the following events: Christmas or Thanksgiving, Mother's Day or Father's Day, Black Friday or Cyber Monday, Summer Holidays, Easter or Spring Break, Back-to-School, Amazon Prime Day/Week, Halloween, and Singles' Day. This research was conducted across 18 global markets and fielded between 23rd February 2022 and 15th March 2022. Please find sample details below.

Market	Sample size	Sample type
Australia	1028	Nat Rep
Canada	1003	Nat Rep
China	1021	Online Rep
Denmark	1003	Nat Rep
France	1038	Nat Rep
Germany	1048	Nat Rep
Hong Kong	513	Online Rep
India	1035	National Urban Rep
Indonesia	1100	Online Rep
Italy	1003	Nat Rep
Mexico	1052	Nat Rep (with urban bias)
Poland	1004	Nat Rep
Singapore	1040	Nat Rep
Spain	1005	Nat Rep
Sweden	1013	Nat Rep
UAE	1209	Nat Rep
GB	2007	Nat Rep
US	1551	Nat Rep

YouGov BrandIndex measures brand health, from thousands of consumer interviews every day across 54 markets. The BrandIndex data utilised in this study covers the UK and the US, collected in May 2022.

To enrich this study, we additionally pulled the Indexed search volume data from **YouGov Signal** for topics: Christmas, Mother's Day, Father's Day, Easter, and Halloween from 1st April 2021 to 10th May 2022 in the US region.

For further information or for any questions about the data used in this report, please **get in touch**.

Thank you

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