

Report Price: £2195 | \$2995 | €2600

e above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

Consumers may be worried about 2019, but it's still important to put on a good Christmas so savvy shopping, cutting back in some areas to indulge in others, is the order of the day and is having a polarising impact on the performance of different retailers.

- Trading down or trading up? Grocery retailing at Christmas
- The high street exciting future or steady decline?
- Outlook for shopping for the home in 2019



"It was a challenging Christmas, but household goods retailers bucked the trend and performed well following robust growth throughout the year." – Thomas Slide, Senior Retail Analyst

Buy this report now	
Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas +1 (312) 943 5250	
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- What you need to know
- Products covered in this Report

EXECUTIVE SUMMARY

- The market
- Retail sales grow 2.1% in December
 Figure 1: Retail sales, by sector, year-on-year growth, December 2018
- Real wages grow but confidence dips
- Shift to online continues
- Missing deliveries continues to worry many at Christmas
- Online searches for Argos increase while Amazon falls in week before Christmas
- Companies and brands
- Weak finish to the year for grocers
- Polarising performance for department stores
 Figure 2: Christmas sales performance of selected retailers, December 2018
- Adspend returns to growth in 2018 Figure 3: Recorded above-the-line, online display and direct mail total and annual change in spending by retailers on advertising during Q4, 2014-18
- TV accounts for half of adspend
 Figure 4: Recorded above-the-line, online display and direct mail advertising spend by retailers, by media type, Q4 2018
- The consumer
- **65% spend Christmas at home** Figure 5: Where they celebrated Christmas, December 2018
- Food and drink bought by 69%
 Figure 6: What they bought for the home at Christmas,
 December 2018
- Supermarkets lead for non-foods
 Figure 7: Where they shop for non-foods at Christmas, December 2018
- November the most popular time to start shopping for the home

Figure 8: When they shop for non-foods for Christmas, December 2018

Tesco dominates at Christmas
 Figure 9: Where they shopped for food and drink for
 Christmas 2018, December 2018

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Holding off for Black Friday
 - Figure 10: Christmas shopping behaviours, December 2018
- What we think

ISSUES AND INSIGHTS

- Trading down or trading up? Grocery retailing at Christmas
- The facts
- The implications
- The high street exciting future or steady decline?
- The facts
- The implications
- Outlook for shopping for the home in 2019
- The facts
- The implications

THE MARKET - WHAT YOU NEED TO KNOW

- Retail sales grow 2.1% in December
- Real wages grow but confidence dips
- Shift to online continues

RETAIL SALES PERFORMANCE

- Retail sales grow 2.1% in December
- Weak end to the year for the food retailers
- Household goods retailers perform strongly
- Non-store still growing
 Figure 11: Retail sales, by sector, year-on-year growth,
 December 2018 and all 2018

MARKET DRIVERS

Real wage growth improves

Figure 12: Monthly year-on-year growth in prices and average weekly earnings, January 2017-December 2018

- **Consumer confidence dips in second half of the year** Figure 13: Consumer financial confidence, January 2017-January 2019
- Impact of Brexit

Figure 14: Consumer reactions to the prospect of Brexit, July 2016-January 2019

- Housing market slows in 2018
 Figure 15: Residential property transactions over £40,000 (seasonally adjusted), monthly % change on a year earlier, 2018
- Falling home ownership among young people

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

EMEA+44 (0) 20 7606 4533Brazil0800 095 9094Americas+1 (312) 943 5250China+86 (21) 6032 7300APAC+61 (0) 2 8284 8100	Visit	store.mintel.com
Americas +1 (312) 943 5250 China +86 (21) 6032 7300	emea	+44 (0) 20 7606 4533
China +86 (21) 6032 7300	Brazil	0800 095 9094
	Americas	+1 (312) 943 5250
APAC +61 (0) 2 8284 8100	China	+86 (21) 6032 7300
	APAC	+61 (0) 2 8284 8100



Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 16: Housing tenure of 25–34 year olds, 2006/07–2016/ 07

ONLINE

- Online continues to grow
- Online food sales Figure 17: Proportion of all grocery sales going online, 2012-18
- Buying for the home online Figure 18: Online shopping for the home, by market category, 2013-18
- The risk of missed deliveries
 Figure 19: Attitudes towards Christmas, by age, December 2018
- Online searches peak on Black Friday
 Figure 20: Search popularity-related online search terms, 1
 November- 25 December 2018

COMPANIES AND BRANDS – WHAT YOU NEED TO KNOW

- Weak finish to the year for grocers
- Polarising performance for department stores
- Adspend returns to growth in 2018

THE RETAILERS

- Food retailers finishing on a weak note Figure 21: Food retailers' performance over Christmas, 2018
- Department stores at the extremes Figure 22: Department stores' Xmas sales performance, 2018
- Other specialists
 Figure 23: Other store-based retailers' Xmas sales performance, 2018
- Non-store still growing strongest overall Figure 24: Non-store retailers' Xmas sales performance, 2018

ADVERTISING AND MARKETING ACTIVITY

- Adspend returns to growth in 2018
 Figure 25: Recorded above-the-line, online display and direct mail total and annual change in spending by retailers on advertising during Q4, 2014-18
- Amazon dominates spending in Q4
 Figure 26: Leading retailers' spending on recorded abovethe-line, online display and direct mail advertising, October-December 2018
- 36% of spend takes place in Q4

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 27: Leading retailers' spending on recorded abovethe-line, online display and direct mail advertising, Q1-3 and Q4 split, 2018

• TV accounts for half of spending

Figure 28: Recorded above-the-line, online display and direct mail advertising spend by retailers, by media type, Q4 2018

• Supermarkets lead spending in Q4

Figure 29: Recorded above-the-line, online display and direct mail advertising spend by retailers, by advertiser type, Q4 2018

- Key campaigns
- Iceland ad that never made it to TV
- M&S Food launched biggest ever campaign
- Lidl targets the premium grocers Figure 30: Lidl guerrilla marketing, November 2018
- Retailers focus on preparing the home
 Figure 31: B&Q Christmas email advertising, October 2018
 Figure 32: B&Q Christmas email advertising (continued),
 October 2018
 Figure 33: HomeSense Christmas email advertising,
 November 2018
 Figure 34: John Lewis Christmas email, October 2018
- Nielsen Ad Intel coverage

THE CONSUMER – WHAT YOU NEED TO KNOW

- 65% spend Christmas at home
- Food and drink bought by 69%
- Supermarkets lead for non-foods
- November the most popular time to start shopping for the home
- Premium grocers more popular at Christmas
- Holding off for Black Friday

HOW THEY CELEBRATE CHRISTMAS

- **65% spend Christmas at home** Figure 35: Where they celebrated Christmas, December 2018
- **16-24 year-olds most likely to host other festive events** Figure 36: Other Christmas events hosted, December 2018

WHAT THEY BOUGHT

Food and drink a Christmas essential

Figure 37: What they bought for the home at Christmas, December 2018

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Furniture bought by young hosts

Figure 38: What they bought for the home for Christmas, by average age and affluence, December 2018

WHERE THEY SHOP FOR NON-FOODS

- Supermarkets lead for non-foods
- Discount stores also appealing
 Figure 39: Where they shop for non-foods at Christmas,
 December 2018
- Supermarkets popular among late shoppers
 Figure 40: Where they shop for non-foods, by when they started shopping, December 2018
- Argos appeals to younger shoppers Figure 41: Where they shop for non-foods (excluding as gifts) for Christmas, by shopper profile, December 2018

WHEN THEY SHOP

- November the most popular time to start shopping Figure 42: When they shop for non-foods for Christmas, December 2018
- Older shoppers most likely to leave it late Figure 43: When they shop for non-foods for Christmas, by age, December 2018
- Larger purchases require earlier planning Figure 44: What they bought for Christmas, by when they started shopping for non-foods, December 2018

WHERE THEY SHOP FOR FOOD

- Tesco dominates main grocery shopping
- **M&S attracts more main shoppers at Christmas** Figure 45: Where they spent the most on food for Christmas 2018, December 2018
- Discounters are popular secondary shops
 Figure 46: Where else they shopped for food for Christmas 2018, December 2018
- Grocery shoppers are more loyal at Christmas Figure 47: Repertoire analysis of retailers used to shop for groceries at Christmas, December 2018

CHRISTMAS SHOPPING BEHAVIOURS

- Holding off for Black Friday
 Figure 48: Christmas shopping behaviours, December 2018
- Millennials love themed items

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 49: Christmas shopping behaviours, by generation, December 2018

- **Premium retailers see most people trade up** Figure 50: Christmas shopping behaviours, by where they shopped for groceries (net any shopped), December 2018
- A high street built for experience Figure 51: Christmas shopping behaviours, by age and gender, December 2018
- Young men struggle to make cut-off date for orders Figure 52: Christmas shopping behaviours, by age and gender, December 2018

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Abbreviations
- Consumer research methodology

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100





About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **mintel.com.**