It’s that time of the year again – Christmas!

And consumers in Europe have already decided what they are buying, where they are buying from, and how much they are allocating for their Christmas shopping.

Me and my Team would like to look back on our cooperation in 2019 and thank you very much for the trust you have placed in us. That is why we would like to treat you with a little gift, our DossierPlus Special "Christmas Shopping in Europe".

This Statista DossierPlus provides facts and trends about the Christmas shopping patterns and expectations of consumers in Europe. Wrapped in key macroeconomic indicators and retail trade figures, it offers in-depth coverage of the most essential insights of the season.

Statista wishes a Merry Christmas
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04 Christmas comes early: the Black Friday effect in Europe
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Festive Facts

**United Kingdom**: 6.8 billion
Christmas ad spend value in 2019

**The Netherlands**: 311 million €
online revenues during Sinterklaas in 2018

**Spain**: 2.8 billion
revenues generated from Christmas Lotto “El Gordo - The Fatty One”

**Germany**: 145 million
chocolate Santas produced in 2018

**Sweden**: 10 million litres
of Beer & Christmas beer sold in Systembolaget stores during Christmas week in 2018

**Denmark**: 2.9 thousand
Christmas tree farms as of 2019

**Italy**: 29 thousand tons
of Panettone produced

**China**: 117 thousand tons
of Christmas decorations supplied into the EU

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01 European Christmas overview

- Christmas retail trade in Europe
- Champions of Christmas retail
It’s the most wonderful time of the year

And certainly the busiest, at least for shoppers and retailers. The so-called Golden Quarter is already in full throttle, Christmas is just around the corner, and shopping deadlines are looming closer. From food to consumer goods, electronics to entertainment, retailers in many categories brace themselves for the surge of shoppers flocking to high streets and online marketplaces. Consumers themselves get savvy with their budgets, wishing for a fine balance between generous giving and smart spending.

Yet Christmas will always be Christmas, meaning shopping lists will always need to be sorted, consumers will always be out in full force on the hunt for the season’s best deals for family and friends, and businesses will roll out their festive strategies to get the best of the spending rush. To put the festive spirit in a consumer perspective, this Statista DossierPlus lays out the Christmas landscape in Europe, tracing developments in retail during the last quarter of the year and offering a snapshot of consumer spending habits and trends.

This Christmas, the expected increase in retail spending in major European countries pales in comparison to the glory of Christmases gone by. Forecasts by the Centre for Retail Research (CRR) indicated that in 2019, Christmas retail spending will perform a minuscule 1.2 percent growth, dropping from the previous two years’ record of a 1.8 percent increase. In view of the declining momentum in global economic growth that afflicted major economies throughout 2019, the projections of moderate progress in holiday spending this year do not come as a surprise.
Christmas brings the biggest joy into the retail sector. The last two months of the year definitely mark a heightened period of spending activity in Europe's Christmas retail landscape. Yet it is fair to say that not every country takes Christmas season shopping as seriously as the United Kingdom. The country's Christmas retail spending in 2018 exceeded those of Italy, Spain and the Netherlands combined. Germany's retail sector provides another set of high numbers during this period. With a retail spending just shy of 70 billion British pounds, or a solid 80 billion euros, Germany has the second biggest Christmas retail business in Europe.
The picture is less cheerful when it comes to what Christmas will bring in retail this year. In the coming holiday season, the two kings of Christmas retail spending, the United Kingdom and Germany, are not expected to perform any Christmas miracles, with the former stalling at a minuscule 0.8 percent growth. Instead, a boost of about two percent is forecasted for both Spain and the Netherlands.

Note: EU; 2017 to 2018
Source(s): VoucherCodes.co.uk; CRR; ID 1063395
Spotlight: United Kingdom

Christmas is serious business in the UK

Christmas evokes the most pleasant of sensations in us: the smell of ginger and spice wafting through Christmas markets, domestic pleasures of cozy evenings spent with loved ones, a bustling time of eating, drinking and generally being merry. Yet more than anything, Christmas is a commercial business, propped up by a number of industries and services, all of which help the commercial wheel turn until the next year.

Retailers in the UK are all too aware of this, as Christmas becomes an arena for major retail brands to mark their name on the season with their Christmas TV adverts. Every year, the UK’s biggest retail companies such as John Lewis, Sainsbury’s, Tesco and Marks & Spencer battle for winning the Christmas ad race to make the most of the Christmas retail boost, attract a wider range of consumers and generate more sales. Earlier in November this year, The Guardian reported that the UK Christmas ad industry reached a staggering value of 6.8 billion British pounds as of the third quarter of 2019, including TV and online ads.
UK retail peaks in December

Not surprisingly, November and December see the most retail activity

Note: United Kingdom (Great Britain); December 2014 to October 2019
Source(s): Office for National Statistics (UK); ID 287878
In December 2018, the value of monthly retail sales made up 12.3 percent of total retail sales in that year. Though in itself this is an impressive enough figure, this proportion was the lowest the UK had had over the past three years. In fact, since 2016, Christmas retail in the UK has not had much reason to be merry. As reported jointly by the British Retail Consortium and KPMG, the total value of retail sales flattened out in the 2018 Christmas season and saw no growth compared to the previous year.
Not all retail is equal in the eyes of Christmas

Food and grocery retail is the clear winner of Christmas spending

While a greater emphasis is put on exchanging gifts or treating oneself to Christmas sales purchases, more than any other retail category, food and grocery sales get the biggest boost during the season. In the UK, grocery retail saw the greatest growth of the past three years in the last quarter of 2018.

Note: United Kingdom; Q4 2016 to Q4 2018
Source(s): GlobalData; ID 789888
The annual development in retail sales during the Christmas trading period establishes Germany as Europe’s second-biggest Christmas retail spender. Despite a somewhat stagnant period between 2000 and 2015, recent holiday seasons in Germany started seeing revived sales in retail again. In 2018, Christmas trade constituted 19 percent of all retail taking place during November and December.

One clear advantage that Germany has over the United Kingdom, and many other European countries, is the Christmas markets that light up many German town centers during the Advent period. In a 2014 report, the Centre for Retail Research indicated that Germany was host to over 2.2 thousand Christmas markets, 20 times more than those in Austria and Switzerland combined. Additionally, Germany’s Bundesverband Deutscher Schaussteller und Marktkaufleute estimated that the contribution of traditional Christmas markets to Germany’s Christmas retail turnover was as high as three billion euros.
Christmas retail revenues to cross the 100 million euro mark

Retail revenue of the Christmas trading period in Germany from 2005 to 2018, with a forecast for 2019

Note: Germany; 2005 to 2018
Source(s): Statistisches Bundesamt; HDE; 1064307

Revenue in billion euros

- 2005: 82.2
- 2006: 83.5
- 2007: 80.3
- 2008: 80.5
- 2009: 78.7
- 2010: 81.1
- 2011: 82.7
- 2012: 82.9
- 2013: 84.3
- 2014: 85
- 2015: 90.6
- 2016: 94.7
- 2017: 98.3
- 2018: 99.4
- 2019: 102.4

Statista
Nussknacker cracks Christmas sales
Toys continue to be seasonal gifts

A detailed category breakdown of retail sales during the Christmas trading period shows that a quarter of all toys in Germany are sold during the Christmas season. In fact, for many other categories such as ceramic products and glassware as well, the impact of Christmas in purchases was clearly discernable.

Share of Christmas trade in annual sales in selected retail sectors in Germany from 2014 to 2018

Sales share

<table>
<thead>
<tr>
<th>Category</th>
<th>2018</th>
<th>2016</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total retail</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Toys</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Household items not mentioned elsewhere</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ceramic and glass products</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Books</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consumer electronics</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Watches and jewelry</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Music instruments and supplies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electrical household appliances</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clothing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Antiques and antique carpets</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cosmetics and body care products</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bakery products and confectionery</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Magazines and newspapers</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
02 The European (Christmas) consumer

- The European consumer in the European economy
- Christmas spending
The European consumer in the European economy
Consumers wary of overspending

From a retail perspective, the Christmas season does not hold many surprises. Compared to other periods in the calendar year, consumer spending typically increases in what is referred to as the *Golden Quarter* of retail. What remains uncertain is whether or not consumers will spend more than they did in the previous year. As has been displayed in the first chapter of this report, the robustness of growth in Christmas spending is predicted to vary across countries for 2019. Yet, compared with the actual growth rates of the two previous years, it seems that it will be a mild Christmas as the European consumer stays cautious.

Following the slowed-down economic activity due to global trade turmoils in 2018, the spring edition of the European Economic Forecast Report published by the European Commission predicts that 2019 will provide a flat transition into a relatively stable period beyond. Citing a decline in consumer confidence throughout 2018 and the resulting impulse to save, the commission report forecasts a push in private consumption - but not before 2020.
Europe's biggest economies

Gross domestic product (GDP) of the leading 10 European countries in 2018

Note: Europe; 2018
Source(s): Eurostat; ID 1078628
Consumer confidence is particularly low in the United Kingdom

Consumer Confidence Index in a selection of European countries 2017 to 2019

Note: Europe; June 2017 to September 2019
Source(s): OECD; ID 686252
2019 stable, 2020 to bring a brighter outlook

Growth in GDP and private consumption in the EU

Average growth rate of private consumption in the European Union (EU) from 2013 to 2017, with a forecast to 2020

Average growth rate of gross domestic product (GDP) in the European Union (EU) from 2013 to 2017, with a forecast to 2020

2019 forecasts were not overwhelming in terms of GDP growth and private consumption in the EU. On both fronts, the outlook for 2020 was more optimistic.

Note: EU; 2013 to 2017
Source(s): European Commission; ID 1067611

Note: EU; 2013 to 2017
Source(s): European Commission; ID 1070317
Household Christmas budget
Who is spending how much on what?

During the 2018 Christmas season, the personal finance plans of European consumers were somewhat reflective of the larger European consumption and retail sales trends. Compared to 2018, Christmas shoppers in Europe are not planning to go overboard in 2019. According to the 2019 edition of Deloitte’s Annual Christmas Survey, the average Christmas budget of European consumers is estimated to go from the previous year’s 446 euros to 461 euros in 2019. Consumers in the United Kingdom, Spain, Italy and Germany were the biggest spenders of the previous year, allocating much higher Christmas budgets than the European average. The picture remains similar this Christmas as well.

On average, the European consumer expected to spend more money on buying presents than food items this Christmas. Other surveys conducted with consumers from Northern Europe also confirmed that, true homebodies that they are, European consumers planned to allocate only a meagre share for travel or going out.
More on giving than feasting
Christmas budget composition in Europe from 2018 to 2019, by category

Note: Europe; September 16, 2019 to October 11, 2019; 18-65 years; 7,190 Respondents
Source(s): Deloitte; ID 1064151
Budget estimations of consumers in four of the biggest economies in Europe - Germany, the UK, Spain and Italy - deemed these countries the most generous this Christmas season. In comparison, Dutch consumers expected to spend below the European average of 460 euros for their holiday expenses.
Europe's biggest Christmas spender
British consumers push the boat out for festive spending

In 2018, Christmas spending per person in the UK was estimated to be 567 British pounds (or 639 euros), the largest Christmas budget in Western Europe, upping the previous year by 1.3 percent.

Note: United Kingdom; September 16, 2019 to October 11, 2019; 18 - 65 years; 803 Respondents; UK adults
Source(s): Deloitte; ID 786555
Italy and Spain
The Mediterranean Christmas budget

Estimated Christmas shopping expenditure in Italy in 2019, by category (in euros)

Expenditure in euros
0 50 100 150 200 250
Gifts 221
Food 140
Socializing 116
Traveling 72

Estimated Christmas holiday expenditure in Spain in 2019, by category (in euros)

Expenditure in euros
0 50 100 150 200 250
Gifts 238
Food 173
Socializing 79
Travel 64

After the UK, Spain and Italy are estimated to have the two next biggest Christmas budgets this year.

(1) Note: Italy; September 16 to October 11, 2019; 14-65 years; 976 Respondents
Source(s): Deloitte; ID 646476

(2) Note: Spain; September 16 to October 11, 2019; 18-65 years; 1,107 Respondents
Source(s): Deloitte; ID 1067500
Germany and the Netherlands

Average Christmas budget estimations

Estimated Christmas spending in Germany in 2019, by category (in euros)

- Gifts: €217
- Food: €116
- Travel: €103
- Going out: €51

Estimated holiday season expenditure in the Netherlands in 2019, by category (in euros)

- Gifts: €122
- Food: €109
- Travel: €78
- Socializing: €32

Germany’s Christmas trading period displays high flying numbers, but personal budget estimations of consumers placed Germany behind Italy, Spain and the UK.

Note: (1) Germany; October 2019; 978 Respondents
Source(s): Deloitte; ID 1069430

Note: (2) Netherlands; September 16, 2019 to October 11, 2019; 18-65 years; 937 Respondents
Source(s): Deloitte; ID 784797
Scandinavian consumers’ spending habits during the Christmas season varied from country to country. According the 2018 results of the Christmas Barometer conducted by the Helsinki-based digital financial services provider Ferratum Group, Danish consumers expected one quarter of their expenses to be on shopping activities.
Nordics Christmas budget: Sweden and Norway
Clothes, games, gadgets: top Christmas expenses

The 2019 results of the same survey revealed slightly differing results for Sweden and Norway.

Christmas expenses in Sweden in 2019, by type

- Clothes: 13%
- Toys and games: 12%
- Shopping in general: 11%
- Candy and delicacies: 9%
- Consumer electronics: 9%

Christmas expenses in Norway in 2019, by type

- Shopping in general: 17%
- Clothes: 14%
- Candy and delicacies: 11%
- Gift cards: 7%
- Consumer electronics: 6%

Source(s):
(1) Ferratum; ID 1072697
(2) Ferratum; ID 1072691
A tale of two channels

- Online retail in Europe
- Online Christmas spending
Online has secured its place in consumers’ purchasing habits, including those on the hunt for the best Christmas deals. Last Christmas, European shoppers did not abandon the joys of strolling through physical stores altogether, and left more money in physical stores. Yet, the average amount consumers expected to spend via online channels increased - contrary to their planned offline Christmas budget, which did not display a significant rise from 2017.

Within online shopping, mobile is gaining more traction with consumers, the convenience and ease of use offered by mobile apps being a significant incentive for this. That being said, consumers mix and match, and most of Christmas shopping is done offline, out in the supermarkets, high streets and shopping centres. Consumer expectations from online shopping get more diluted and refined during the holiday season as well, as Christmas shopping is necessarily more personalized and time sensitive.
Christmas budget online and offline
Average budget in Europe from 2018 to 2019, by channel

<table>
<thead>
<tr>
<th>Year</th>
<th>Online</th>
<th>Offline</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>128</td>
<td>268</td>
</tr>
<tr>
<td>2019</td>
<td>134</td>
<td>275</td>
</tr>
</tbody>
</table>

Note: Europe; September 16, 2019 and October 11, 2019; 18-65 years; 7,190 Respondents
Source(s): Deloitte; ID 1067428
Christmas is becoming more online, because retail is too. In Europe, the proportion of online sales in all retail has already gone up from 4.8 percent to roughly 9 percent between 2012 and 2018. In some mature e-commerce markets like the UK, Germany and France, this share is forecast to go over the 10 percent mark in 2019.

2019 forecasts for the sales value of online retail indicate impressive numbers across Europe. The Centre for Retail Research estimates a value of between roughly 9 billion British pounds in the Netherlands and 76 billion British pounds in the United Kingdom.
Small steps and big steps: European online retail share outlook

Year-on-year increase in online retail sales in selected European countries in 2019

<table>
<thead>
<tr>
<th>Country</th>
<th>Increase in online sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>19%</td>
</tr>
<tr>
<td>Germany</td>
<td>15.9%</td>
</tr>
<tr>
<td>France</td>
<td>10.9%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>9.9%</td>
</tr>
<tr>
<td>Spain</td>
<td>5.4%</td>
</tr>
<tr>
<td>Italy</td>
<td>3.9%</td>
</tr>
<tr>
<td>European average</td>
<td>10.8%</td>
</tr>
</tbody>
</table>

Note: Europe; 2018
Source(s): CRR; ID 795571
Holiday shopping expectations are online in Europe

Italian and Spanish consumers most keen to buy from online marketplaces

Share of consumers planning to buy more from online marketplaces during holiday season in Europe in 2019, by country

Consumer data from research conducted by Salesforce Marketing suggested that **Italy** and **Spain** showed the most interest in online marketplaces this holiday season.

**Note:** Europe; June 2019; 4,007 Respondents

**Source(s):** Salesforce Research; ID 1066662
... and mobile

Less popular than online shopping, but mobile shopping apps are getting there

Online shopping takes many shapes, and mobile, whether in a browser or an app, is gaining more traction with consumers. For Christmas shoppers as well, mobile apps were an attractive option across Europe.

Share of consumers planning to shop through mobile apps during holiday season in Europe in 2019, by country

Note: Europe; June 2019; 4,007 Respondents
Source(s): Salesforce Research; ID 1066732
UK shoppers do not love online less, but high street shopping more. At least when it comes to Christmas shopping. While a mix of channels such as mobile apps and retailer websites were not off the table for UK Christmas shoppers, high streets and shopping centers trumped all other options. In a 2018 consumer survey commissioned by one of the UK’s leading retail industry publications Retail Week, pure-play marketplaces such as Amazon and eBay were revealed to be popular destinations for only 15 percent of Christmas shoppers.

Note: United Kingdom; 2018; 2000 Respondents; UK consumers
Source(s): Retail Week; Valitor; ID 946863
Online brings a breath of fresh air to UK Christmas retail

High street shopping and spending in physical stores make up the backbone of Christmas retail. Yet, the pace with which online is keeping up hints at many more digital Christmases to come. Between the two Christmases in 2017 and 2018, store-based sales in the UK regressed by 2.3 percent, whereas online sales made a solid 10 percent progress.

Note: United Kingdom; 2017 to 2018
Source(s): CRR; ID 1063630
This Christmas season, online shopping plans of UK consumers favored items such as books and electronics over other retail consumption. A consumer survey from Periscope by McKinsey confirmed a common resistance associated with otherwise rampant online shopping: UK shoppers still planned to do their household shopping for food and groceries mostly offline in the 2019 holiday season.

Note: United Kingdom; August 2019; 501 Respondents
Source(s): Periscope; ID 1074935
German shoppers stick to the shops
...but with less loyalty over the years

Annual Christmas surveys published by Ernst & Young reveal that German shoppers' loyalty towards physical stores is diminishing. Shoppers no longer depend entirely on town centres, department stores and supermarkets for their Christmas shopping as online channels provide better prices, increased variety, and availability - important factors that drive the Christmas gift shopping process.

Note: Germany; October 2015 to 2018; 18 years and older; 1,000 Respondents
Source(s): EY; ID 1069252
Online is the way to go for consumer electronics purchases

Leading product categories that German shoppers prefer to buy online as of 2019

According to Statista’s 2019 Holiday Season & New Year survey, German consumers have a clear notion of what to purchase from the web rather than the shop. Similar to UK shoppers, German consumers are also most open to buying electronics online rather than offline.

Note: Germany; October 16-21, 2019; 18 years and older; 722 Respondents; Bought at least one gift online rather than in store

Source(s): Statista Survey; ID 1076721
Just browsing
Online has a broader function in the shopping journey

Christmas shopping is an equation with multiple variables. Online or offline, Christmas shoppers want to get their Christmas shopping done. Yet, questions abound: what to buy, where to buy, and how much to spare. Help comes from a multitude of sources: TV, out-of-home, physical stores, print and digital media - all race to get the attention of the Christmas shopper.

The unique advantages online channels offer - such as access to a wide network of customer reviews, price comparisons and a greater variety of choice - give digital sources a further edge in the consumers' Christmas shopping quest. But the end result doesn't have to be a purchase. Shoppers browse and buy online or browse online and finalize the shopping experience in store. Either way, online channels inform and shape the decisions shoppers make to an increasing degree.
Online plays a greater role in researching for Christmas gifts in the UK.

Festive season gift inspiration and discovery channels in the United Kingdom (UK) in 2018

<table>
<thead>
<tr>
<th>Channel</th>
<th>Share of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>70%</td>
</tr>
<tr>
<td>In store</td>
<td>70%</td>
</tr>
<tr>
<td>Print</td>
<td>22%</td>
</tr>
<tr>
<td>TV</td>
<td>27%</td>
</tr>
<tr>
<td>Outdoor</td>
<td>13%</td>
</tr>
</tbody>
</table>

Insights from Facebook's 2019 Holiday Study suggest that last Christmas shoppers in the United Kingdom consulted online sources and physical stores for ideas and inspirations equally on their holiday shopping quest. True multichannel browsers, UK shoppers were more likely to utilize online when choosing and purchasing gifts compared to all those surveyed across the EMEA region.

Note: United Kingdom; 2018; 18 years and older; 1,501 Respondents
Source(s): Facebook; Ipsos; ID 1076500
Germany and the Netherlands
Inspiration and discovery channels for Christmas purchases

Physical stores were still relevant for German consumers not only when they were making their Christmas purchases, but also when they were looking for gift ideas and inspirations. The same went for Dutch shoppers.

Note:
(1) Note: Germany; 2018; 18 years and older; 1,502 Respondents
Source(s): Facebook; Ipsos; ID 1076522

(2) Note: Netherlands; 2018; 18 years and older; 1,500 Respondents
Source(s): Ipsos; Facebook; ID 1076562
Italy and Spain
Inspiration and discovery channels for Christmas purchases

For shoppers in Italy and Spain, digital sources carried more weight than they did for Dutch and German consumers.

(1) Note: Italy; 2018; 18 years and older; 1,501 Respondents
Source(s): Facebook; Ipsos; ID 1067622

(2) Note: Spain; 2018; 18 years and older; 1,503 Respondents
Source(s): Facebook; Ipsos; ID 1076659
Among those surveyed in Facebook's Holiday Study, Sweden was the only other country (after the UK), where shoppers utilized online channels more than any other conventional sources.
Getting into the mind of the Christmas shopper is a daunting task. Consumer expectations and plans depend on so many things: budget, demographics, time available to the shopper. When online shopping factors into this, beyond common advantages such as convenience and better pricing, other considerations emerge for the Christmas shopper such as supply chain and fulfilment capabilities of retailers. In the recent past, many online retailers learnt their lesson the bitter way: delays in delivery of Christmas purchases pushed consumers to frustration and put the brand image of retailers into jeopardy. To combat this, retailers now define deadlines for holiday purchase orders and offer lax return policies. The courier services and delivery staff of online retailers receive special seasonal reinforcement as well. All to keep the Christmas shopper coming to the online shop.
What does the Christmas shopper want online?

- **Austria**: Access to customer reviews, 74%
- **Germany**: Home delivery, 80%
- **UK**: Low cost delivery, 79%
- **Italy**: Price comparison, 60%
- **Netherlands**: Access to customer reviews, 62%
- **Sweden**: Fast delivery, 65%
- **Norway**: Broad return deadline, 75%
- **Denmark**: Fast delivery, 78%
Christmas comes early: the Black Friday effect in Europe
- Black Friday and Cyber Week in Europe
- Black Friday retail sales
Black Friday in Europe
Consumers get the most out of Christmas with Black Friday

Christmas comes but once a year, but for shoppers and retailers it comes earlier now. Across Europe, many consumers already begin their Christmas shopping as early as September in a bid to avoid the stress of frenzied crowds on high streets. Thanks to the wild popularization of the most popular U.S. shopping event, Black Friday, in the rest of the world, the holiday shopping season now has an unofficial kickstarter in Europe as well.

Originally an American shopping event that marks the end of Thanksgiving Day, Black Friday sees special retailer discounts on a massive scale, online and in brick-and-mortar stores alike. While it has still not caught on on the high street as widely as it has across the Atlantic, European shoppers have by no means been slow to catch up with the frenzy of Black Friday shopping. Today, awareness of and participation in Black Friday and its adjacent Cyber Monday sales have increased enough to make them a commonplace presence in the Christmas shopping journey of European consumers.
Holiday season starts with excessive shopping in the U.S.

Number of people who shopped during the Black Friday weekend in the U.S. in 2017 and 2018, by day

<table>
<thead>
<tr>
<th>Day</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thursday (Thanksgiving)</td>
<td>32</td>
<td>35</td>
<td>39.6</td>
</tr>
<tr>
<td>Black Friday</td>
<td>115.7</td>
<td>116.4</td>
<td>114.6</td>
</tr>
<tr>
<td>Saturday</td>
<td>71.3</td>
<td>67.9</td>
<td>66.6</td>
</tr>
<tr>
<td>Sunday</td>
<td>35.2</td>
<td>33</td>
<td>33.3</td>
</tr>
<tr>
<td>Cyber Monday</td>
<td>78.4</td>
<td>75.8</td>
<td>68.7</td>
</tr>
</tbody>
</table>

The Black Friday craze lasts from Thanksgiving Thursday until the following Monday, or, as retailers like to call it, Cyber Monday. According to estimates of the National Retail Foundation, the number of individuals who shopped over this five-day period reached over 300 million in 2018.

Note: United States; October 31 to November 6, 2019; 18 years and older; 7,917 Respondents
Source(s): National Retail Federation; Prosper Insights & Analytics; ID 243501
Black Friday: a serious business in Europe

UK and Germany spend the most over Black Friday

Black Friday may be a U.S. phenomenon, but European consumers warmed to the shopping craze in no time. Unlike the U.S., where brick-and-mortar stores see some of the most overwhelming images of consumers racing to grab the top bargains, Black Friday is predominantly an online affair in Europe. In fact, the DACH region's own mega sales event, "Black Friday Sale", is dedicated purely to sales offered by online retailers. This Europeanized version of Black Friday greets shoppers on its websites with impatient displays of the countdown to the year's biggest day of flash sales.

Total value of sales during Black Friday and Cyber Monday in selected European countries in 2018 with a forecast for 2019 (in million GBP)

Note: Europe; 2018
Source(s): VoucherCodes.co.uk; CRR; ID 1075269
# Black Friday consumer budget in European countries

Expected spend per person during Black Friday in selected countries in Europe in 2018

<table>
<thead>
<tr>
<th>Country</th>
<th>Average spend per person in euros</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Kingdom</td>
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<td>Russia</td>
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<tr>
<td>Turkey</td>
<td>84</td>
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</tbody>
</table>

*Note: Europe; 2018; 12,000 Respondents
Source(s): Picodi; ID 934968*
Black Friday discount rates in Europe
Average discount rate offered by stores during Black Friday in selected European countries in 2018

Average discount rate

<table>
<thead>
<tr>
<th>Country</th>
<th>Discount Rate</th>
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</thead>
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<tr>
<td>United Kingdom</td>
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<tr>
<td>Germany</td>
<td>53%</td>
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<tr>
<td>Austria</td>
<td>51%</td>
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<td>Switzerland</td>
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<tr>
<td>Spain</td>
<td>47%</td>
</tr>
<tr>
<td>Italy</td>
<td>45%</td>
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<tr>
<td>Sweden</td>
<td>45%</td>
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<tr>
<td>Finland</td>
<td>45%</td>
</tr>
</tbody>
</table>

Note: Europe
Source(s): Picodi; ID 1067993
Trailblazing European retail

Spanish shoppers were the most keen to purchase on Black Friday in 2018

In Europe, the most dizzying Black Friday in 2018 took place in Spain, where retail sales saw the biggest spike. According to data analyzed by commerce marketing company Criteo, major European countries felt the impact of both Black Friday and Cyber Monday in retail transactions to enormous degrees - varying from an increase of 156 to over 400 percent.

Percentage change in retail sales on Black Friday and Cyber Monday in Europe in 2018, by country

Note: Europe; October 2018 to November 2018; all retail.
Source(s): Criteo; ID 1065500
Most purchased products on Black Friday
Consumer electronics attract the most attention from shoppers

Sales index of most purchased retail products purchased in the EMEA region during Black Friday in 2018, by category

- Computing/high tech: 373
- Health/beauty: 333
- Fashion/luxury: 317
- Sporting goods: 307
- Home improvement, gardening &…: 141
- Mass-merchandise: 136

The most purchased product categories during Black Friday suggest that consumers hunted for bargains on pricier items - and retailers obliged. In 2018, Black Friday shoppers spoiled themselves with consumer electronics and luxury purchases.

Note: Europe; 2018; all retail.
Source(s): Criteo; ID 1067876
It's not just tech that has its big day on Black Friday
Fashion and luxury sales went through the roof in Spain and the UK

Percentage change in retail sales of fashion and luxury items on Black Friday in Europe in 2018, by country

Spain: 471%
United Kingdom: 437%
Sweden: 406%
Netherlands: 328%
France: 290%
Switzerland: 243%
Germany: 206%

When consumers were not looking to replace their Smart TVs or upgrade to a new virtual assistant, they were renewing their wardrobes with fashion and luxury items. In major European countries, the number of transactions in this category saw an increase of over 200 percent compared to the four-week period before Black Friday.

Note: Europe; October 2018 to November 2018; all retail
Source(s): Criteo; ID 1059763
Black Friday and Christmas: perfect together
Consumers drawn to the lure of Black Friday for their Christmas shopping

Unlike in the U.S., there is no definitive date that officially marks the beginning of the holiday season in Europe. Indeed, it is more than likely to see supermarkets stacking festive products against the backdrop of merry tunes annoyingly early in the season. But it is possible to say that with the transformation of Black Friday and Cyber Monday from an American shopping indulgence to a global event, traditional shopping timelines and preferences of European consumers have shifted.

This was true to the degree that, ditching Boxing Day and pre-Christmas sales, consumer surveys showed that UK consumers picked Black Friday as their preferred shopping day. German consumers were partial to Black Friday as well, but not without showing some degree of indifference to any form of shopping event first. A survey conducted by Periscope Solutions by McKinsey found that if Germans chose to participate at all, Black Friday and Cyber Monday overtook more traditional discount opportunities like pre-Christmas sales.
Move aside, Christmas sales
Black Friday is arguably the most popular retail event in Europe

The period between the American Thanksgiving weekend and New Years is nothing short of a series of special shopping events. In Europe, Black Friday and Cyber Monday saw the most concentrated retail sales activity by far. Cyber Monday and the freshly-minted shopping event "Singles Day" also triggered greater sales activity.

Daily sales index in the EMEA region during holiday season in 2018, by event

Note: Europe; 2018; all retail.
Source(s): Criteo; ID 1067834
Black Friday's imprint on the holiday season: Germany

Main holiday event participation among German consumers

A holiday insights study conducted by Periscope by McKinsey revealed some interesting conclusions around holiday shopping preferences of consumers. Of those consumers surveyed in Germany, 42 percent stated an aversion to any holiday shopping event in 2019. If they were interested, however, Black Friday and Cyber Monday had precedence over pre-Christmas sales.

Note: Germany; August 2019; 18 years and older; 501 Respondents
Source(s): Periscope; ID 1065456
Black Friday's imprint on the holiday season: United Kingdom

Main holiday event participation among UK consumers

When it comes to the UK results, Boxing Day sales were still seen to be cherished. In fact, a higher share of consumers preferred Boxing Day shopping to Cyber Monday sales. Black Friday still remained the clear winner with the majority of consumers planning to participate in the event.

Note: United Kingdom; August 2019; 18 years and older; 501 Respondents
Source(s): Periscope; ID 1085433
Holiday shopping timeline in Europe

Christmas shopping gets done between late November and early December

In the UK, Germany, Sweden, and the Benelux countries, consumers invariably concentrated on the first half of December to start their holiday shopping. Another peak time for Christmas shopping was late November, particularly so with UK and German shoppers.

The shopping window in the last two weeks of November coincides with Black Friday and Cyber Monday, which again is likely to create a ripple effect well into December. The fact that Black Friday is an organized event marketed globally on a massive scale makes this shopping phenomenon an attractive option for the spending masses. In any case, the convenient blending of Black Friday with Christmas sales provides an opportunity for those who like to keep on top of their Christmas holiday shopping lists.

Note: Europe; December 2018 to January 2019; 4,500 Respondents
Source(s): Episerver; ID 1077857
Recommendations

Dossiers

- Black Friday in the UK
- Black Friday in the Netherlands
- Thanksgiving weekend shopping in the U.S.
- Christmas in Scandinavia
- Christmas in Sweden
- Christmas season in the U.S.
- Holiday season shopping in Canada

Statista Consumer Survey

- Holiday Season & New Year in the UK 2019
- Holiday Season & New Year in the U.S. 2019
Sources

British Retail Consortium  OECD
Criteo  Office for National Statistics (UK)
CRR  Periscope
Deloitte  Picodi
Episerver  Prosper Insights & Analytics
European Commission  Retail Week
Eurostat  Salesforce Research
EY  Statista Survey
Facebook  Statistisches Bundesamt
Ferratum  Valitor
GlobalData  VoucherCodes.co.uk
HDE  
Ipsos  
KPMG  
National Retail Federation  

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