

InMobi's 2023 Retail Holiday Shopping
Playbook

INMOBI

The **2023** Holiday Advertiser's Guide

Consumer and Marketing Trends in **Australia and New Zealand**



Executive Summary

What's not to love about the holiday season? With food, family, friends, and fun, Australians and New Zealanders eagerly look forward to the last three months of the year.

This celebration leads to a rise in shopping sprees, making it **a great opportunity for brands and retailers** to connect with their consumers. To help make the most of the opportunity, InMobi put together this guide that covers this year's **top trends among holiday shoppers** in the region and insights into **when and where** you can engage with them.

Research Objective

InMobi conducted this research to:

- 📁 **Decode holiday shoppers' sentiments** in Australia and New Zealand
- 📁 **Discover where the region's shoppers will buy** and what appeals to them
- 💡 **Deliver deep insights for brands and retailers** to drive their efforts

Research Methodology

- **On-device** survey
- Sample size: **n = 1,000 mobile users** in Australia and New Zealand
- Respondents recruited between **September 11 and 13, 2023**
- Results targeted and weighted to represent Australia's and New Zealand's **smartphone population**





Holiday Shopping Trends Highlights for 2023



Pockets remain open

65% of holiday shoppers reported plans to maintain or increase budgets



Hybrid shopping leads the way

64% of these shoppers said they would shop online and offline



Shoppers are still exploring

62% have not yet decided on a brand or category to shop for this season



Holiday sales drive shopping

76% of undecided shoppers reported they would shop at key holiday sales events

Q. How have your shopping budgets changed this holiday season? | Sample size: 774

Q. Where will you shop this holiday season? | Sample size: 774

Q. How do you plan to shop for this holiday season? | Sample size: 774

Q. When do you expect to start planning your holiday shopping for this year? | Sample size: 477





The budget balance

While budgets are mostly in the low-to-mid range, **65%** of holiday shoppers are showing a tendency to spend the same as or more than the previous year.

The reasons to not increase budgets

52% of shoppers with reduced budgets and **38%** who maintained budgets stated the **increased cost of living** as the reason.

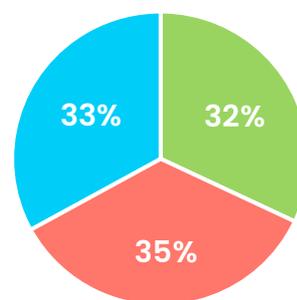
Over 20% of these shoppers were also concerned about **increased prices**.

Interestingly 10% of shoppers with maintained budgets and **5%** with reduced budgets cited **sustainability** concerns as the core reason.

Budget-wise distribution of holiday shoppers

Up to AUD\$650	47%
Between AUD\$650 and AUD\$1,200	39%
Over AUD\$1,200	14%

Shifts in holiday shopping budgets



■ Increase ■ Decrease ■ No change



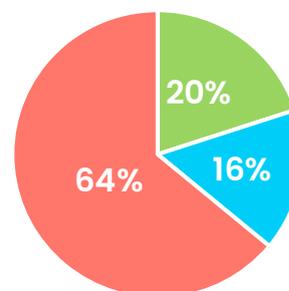
The holiday haul

Australians and New Zealanders plan to enjoy shopping both on digital platforms and at physical stores, with **64%** reporting this, indicating that the region has **20% more hybrid shoppers** than last year.

Top five categories on holiday shoppers' to-buy lists:

- Apparel and Accessories
- Beauty and Personal Care
- Hobbies and Recreational Goods
- Groceries, Specialty Food, and Beverages
- Gadgets and Appliances

Holiday shopping plans by channel



■ Online ■ Offline ■ Both online and offline

Q. How have your shopping budgets changed this holiday season? | Sample size: 774
 Q. Why has your shopping budget decreased this holiday season? | Sample size: 275
 Q. Why has your shopping budget not increased this holiday season? | Sample size: 255
 Q. How much do you expect to spend in total on holiday shopping this year? | Sample size: 662
 Q. What categories of items are you planning to shop for during the holiday season? | Sample size: 477
 Q. Where will you shop this holiday season? | Sample size: 477





The self-love, family-first phenomenon

Holiday shoppers in ANZ said that they would make the primary decisions while buying this holiday season. They are shopping for their families first, and then for themselves.

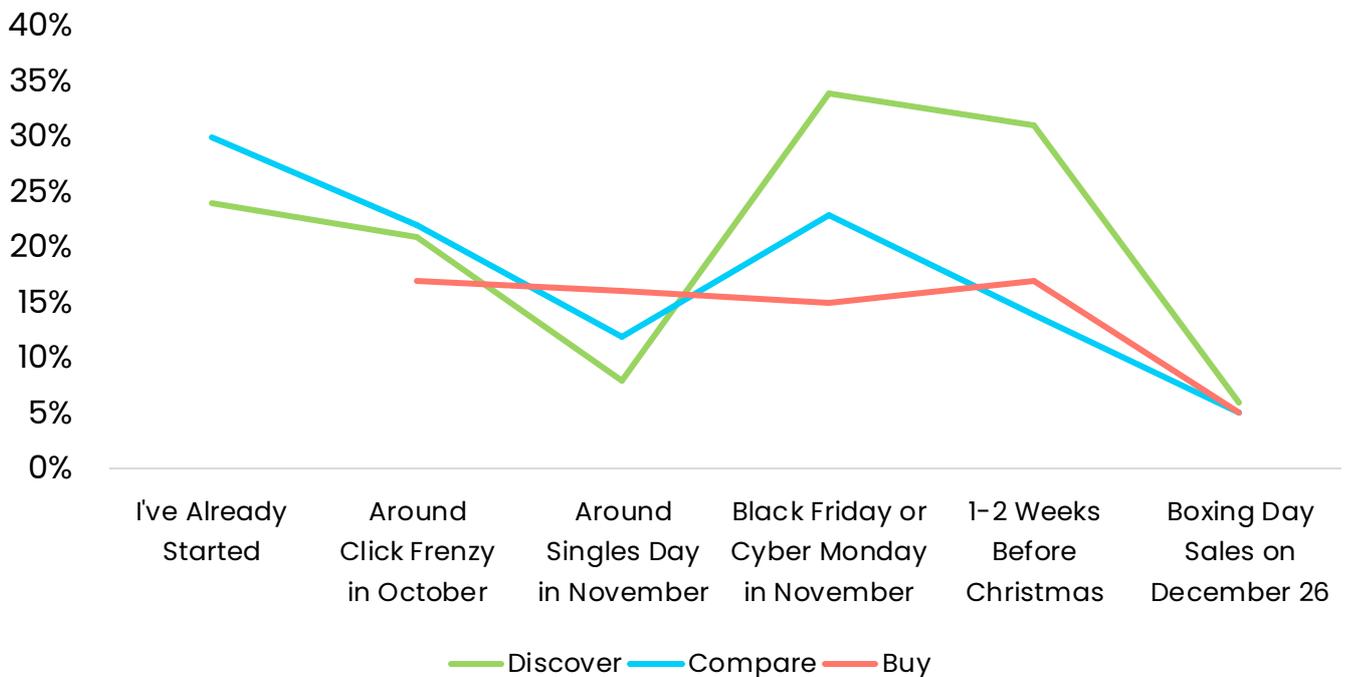
62% rated themselves as the primary decision makers for holiday shopping

65% put their families first on the shopping list

The holiday sale seekers

Shoppers plan to discover deals and products and compare products they would like to buy throughout the last three months of the year. Holidays and holiday sales are extremely important to Australians and New Zealanders, leading **shopping to peak during Black Friday/Cyber Monday and right before Christmas**. Thus, brands must be present to stay on top of minds throughout the shopping journey to win hearts.

Shopping activity across the holiday season



Q. Who is the primary decision maker for holiday shopping in your household? | Sample size: 774
 Q. Who are you mainly shopping for this holiday season? | Sample size: 477
 Q. When do you expect to start planning your holiday shopping for this year? | Sample size: 477
 Q. When will you shortlist brands for the categories you plan to buy? | Sample size: 208
 Q. When will you buy the particular brand/product? | Sample size: 89



Different stages, different mediums: but mobile rules

Even while looking at unplanned shoppers who were yet to decide on products and brands, we saw mobile dominate the shopping journey. Although Australians and New Zealanders rely on different channels for different phases of their shopping journey, mobile **emerges at the top across categories – even for products that are traditionally bought offline**, such as automobiles. The only category that saw more offline shoppers was groceries, with **51%** stating they would buy them at physical stores. Interestingly, physical stores are a significant second for all categories.



Discover

- Brand websites/apps: **48%**
- Email/newsletters from brands: **45%**
- Physical store: **40%**
- Family and friends: **40%**
- Mobile search/ads: **37%**
- Television: **35%**
- Newspapers, magazines, and billboards: **16%**
- WhatsApp/SMS nudges from brands: **6%**
- Radio/podcast (audio): **6%**



Compare

- Mobile: **64%**
- Physical store: **32%**
- Desktop: **38%**



Buy

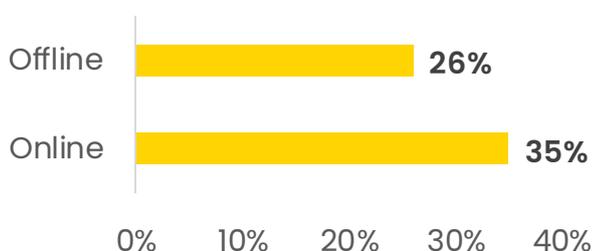
- Physical store: **50%**
- Mobile: **38%**
- Desktop: **12%**



The reasons behind the mediums

Holiday shoppers in the region choose **mobile for convenience** and **physical stores to tangibly experience** the product. However, **deals are a key driver** across both experiences

Increase in shopping budgets by channel



Top three reasons cited for shopping on mobile

- Convenience of ordering: **70%**
- Easy payments: **56%**
- App-only discounts: **45%**

Top three reasons cited for shopping at stores

- Getting to see or try products: **81%**
- Lesser chances of buying the wrong product: **69%**
- In-store offers: **59%**

Q. Which channel will you use to shop for these items during this holiday season? Sample size: 477
 Q. Where do you learn about holiday season sales and offers? | Sample size: 477
 Q. Which channel will you use to research or explore for holiday shopping? | Sample size: 477
 Q. Through which channel are you more likely to make a purchase this holiday season? | Sample size: 477
 Q. What are your top three reasons to shop online on your mobile? | Sample size: 477
 Q. What are your top three reasons to shop offline or physically at a store? | Sample size: 774
 Q. With respect to last year, how has your budget changed for offline shopping? | Sample size: 774
 Q. With respect to last year, how has your budget changed for online shopping? | Sample size: 774

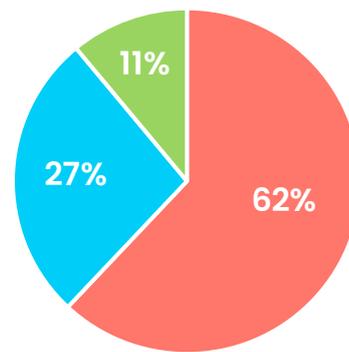


The three holiday shopper personas of the year



- 1 Bargain hunters**
who have not planned their purchases and are looking for incentives
- 2 Category explorers**
who have decided on items to buy but not on the brands
- 3 Brand lovers**
who know both the category and the brands they want

Distribution of holiday shoppers

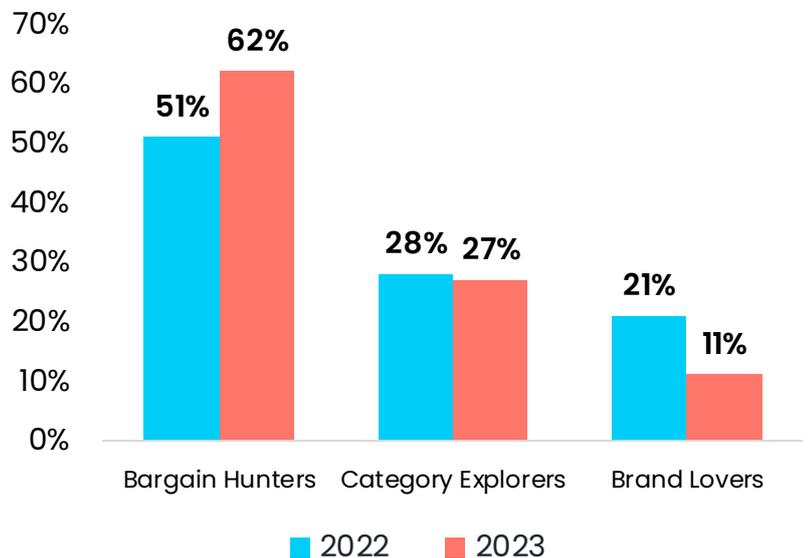


■ Bargain Hunters ■ Category Explorers
■ Brand Lovers

The goal remains to bag a bargain

More holiday shoppers reported they would seek deals and explore brands, making it even more important for brands to be present on the shopping journey.

Shopper personas 2023 vs. 2022



Of spending and wish lists

As one would anticipate, over half of **bargain hunters reported tight budgets**. Category explorers have bigger budgets, but half of them are in the mid-range, showing **deals do matter**. **Brand lovers are prepared to pay** for what their preferred brand or product deserves.

Budgets	Bargain Hunters	Category Explorers	Brand Lovers
Up to AUD\$650	59%	26%	18%
AUD \$650-1,200	32%	50%	53%
AUD\$1,200+	9%	24%	29%

Top categories across personas

👕 Apparel and Accessories 🧴 Beauty and Personal Care 📱 Gadgets and Appliances
 🍌 Groceries and Specialty Food 🎮 Hobbies and Recreational 🏠 Home and Garden

Of genders and generations

A majority of holiday shoppers across genders and generations indicated they would **explore deals**.

More men said they would explore options within categories or have set their sights on a brand.

Among generations, **Gen Z looks to be the most loyal to their brands**.

Who identifies as a bargain hunter?

82% of Gen X | **58%** of millennials | **57%** of Gen Z

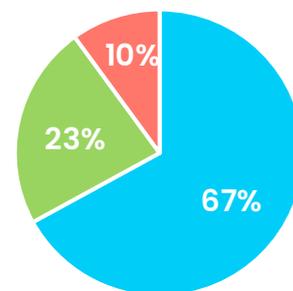
Who identifies as a category explorer?

25% of Gen Z | **39%** of millennials | **24%** of Gen X

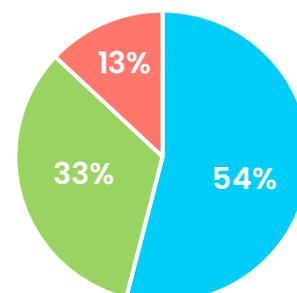
Who identifies as a brand lover?

19% of Gen Z | **13%** of millennials

Types of female holiday shoppers



Types of male holiday shoppers



■ Bargain hunters
 ■ Category explorers
 ■ Brand lovers

Q. How much do you expect to spend in total on holiday shopping this year? | Sample size: 233
 Q. What categories of items are you planning to shop for during the holiday season? | Sample size: 297
 Q. How do you plan to shop for this holiday season? | Sample size: 774



How can brands shine this holiday season?

Top tips to delight holiday shoppers

Understand consumers and decode their online and offline behavior

Spark interest throughout their shopping journey on the apps they love

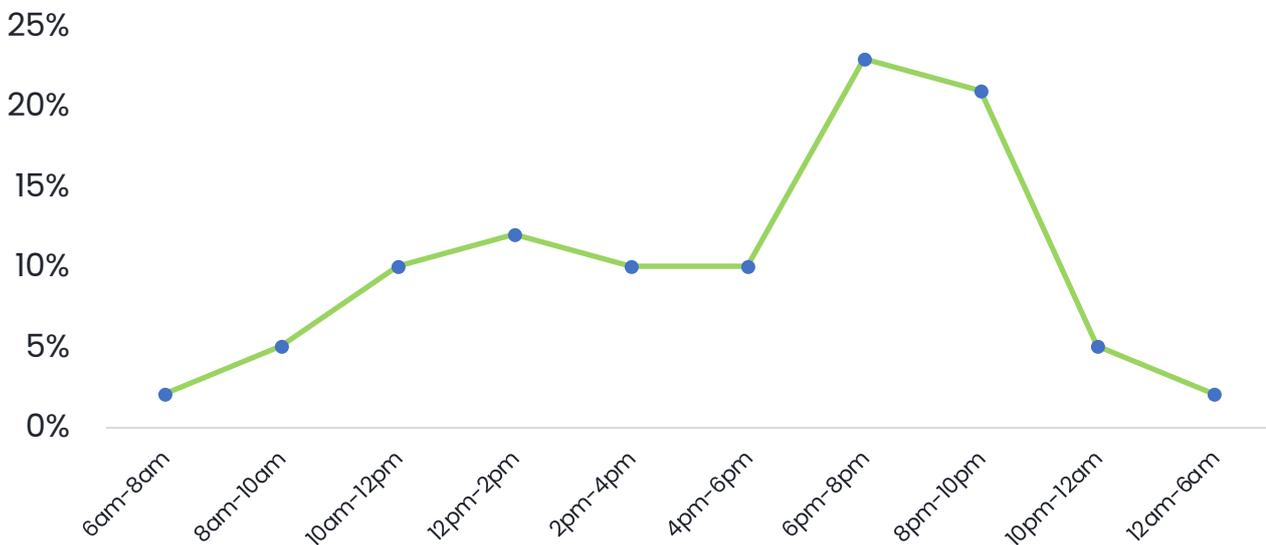
Drive delight with innovative and engaging mobile experiences that inspire action

Captivate them during the evening shopping peak

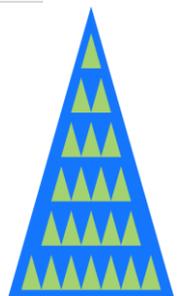
While there is a fair amount of mobile shopping throughout the day, it peaks when Australians and New Zealanders wind down in the **evenings**.

44% of holiday shoppers reported they tend to shop on mobile **between 6pm and 10pm**.

Mobile shopping activity across the day



Q. What time of the day do you usually shop online? | Sample size: 774



Leverage technology to delight shoppers on their favorite apps



Smile Detection



Augmented Reality



Voice Detection



VR With Pedometer



Blow Technology

Engage them with innovative mobile experiences

Create **mobile-first experiences** that drive engagement and action.



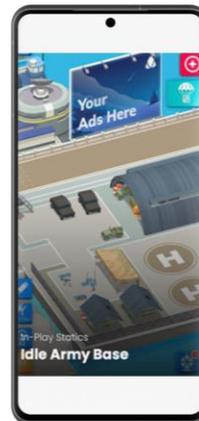
Stunning Videos



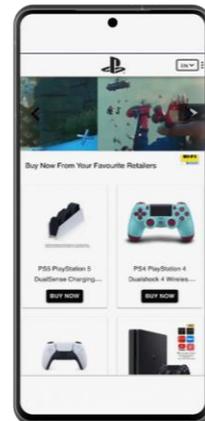
Gamified Units



Rich Media



In-game



Shoppable Media





About InMobi

InMobi is a leading provider of marketing and monetization technologies. With deep expertise and unique reach in mobile, it is a trusted and transparent technology partner for marketers, content creators, and businesses of all kinds. InMobi's mission is to power its customers' growth by helping them engage their audiences and build meaningful connections. Its affiliated businesses – Glance, an unconsolidated subsidiary that offers a lock screen-based content discovery platform, and video platform Roposo – help InMobi create new content and commerce experiences in a world of connected devices. InMobi is headquartered in Singapore, maintains a large presence in San Francisco and Bangalore, and has operations in New York, Chicago, Kansas City, Los Angeles, Delhi, Mumbai, Beijing, Shanghai, Jakarta, Manila, Kuala Lumpur, Sydney, Melbourne, Seoul, Tokyo, London, and Dubai. To learn more, visit <http://www.inmobi.com/>.

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