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## **Christmas and Financial Crisis**

A Survey by Dialego

November 2009

November 2008

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## ■ Background to the Survey

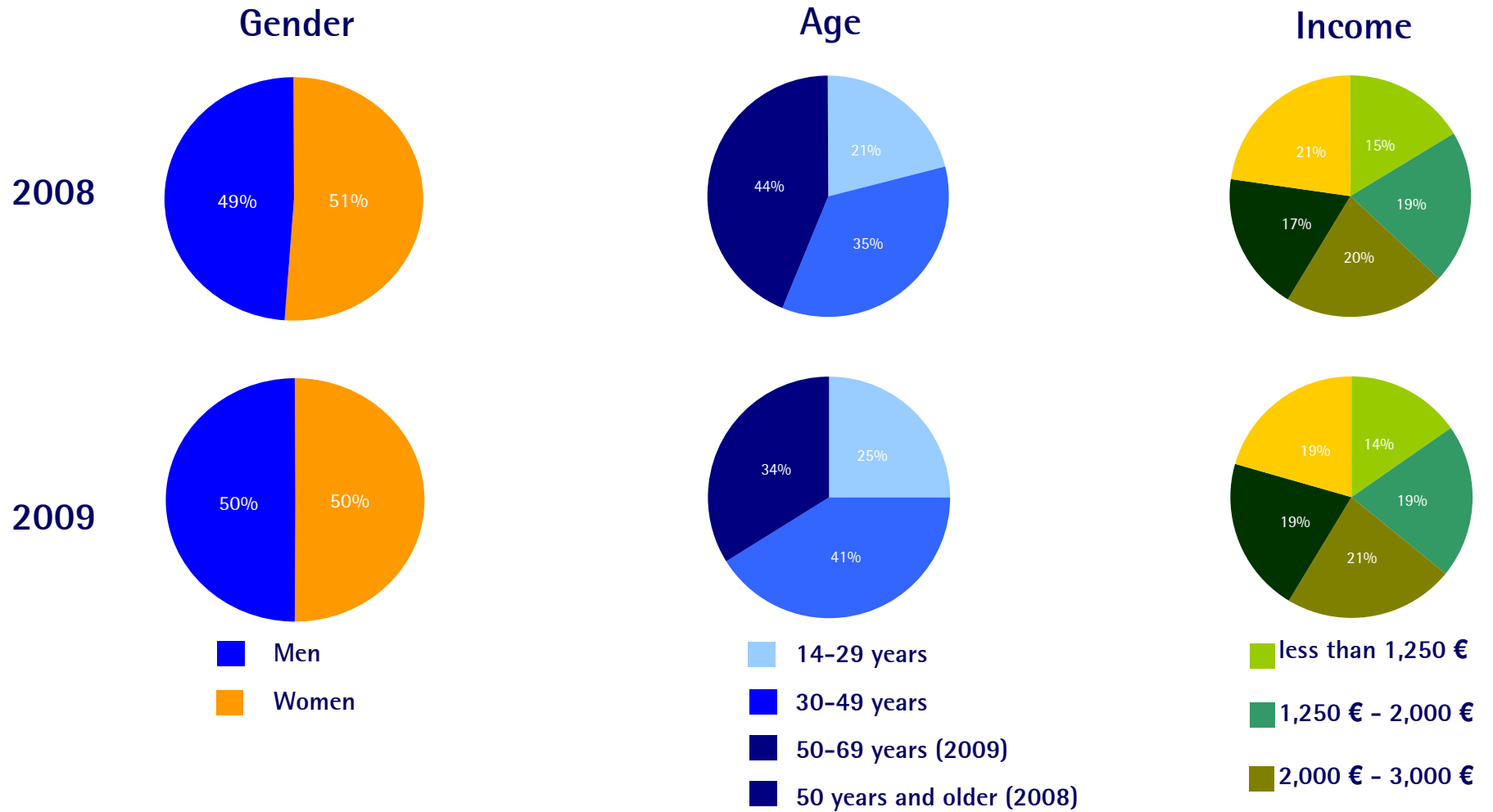
- The aim of the survey was to discover if consumers limit their expenses for Christmas presents in the light of the ongoing financial crisis in comparison to 2008.

## ■ Procedure:

- Online survey in Germany with 1,000 interviews
- The survey participants were selected according to gender and age from the Dialego Access Panel
- Participants received an invitation by personalised email which included a hyperlink to the survey
- The sample was quoted according to gender and age variables as per the German population (micro census)

## ■ Field Time:

- |          |                  |        |                  |
|----------|------------------|--------|------------------|
| ■ Start: | 13 November 2008 | Start: | 15 November 2009 |
| ■ End:   | 20 November 2008 | End:   | 22 November 2009 |

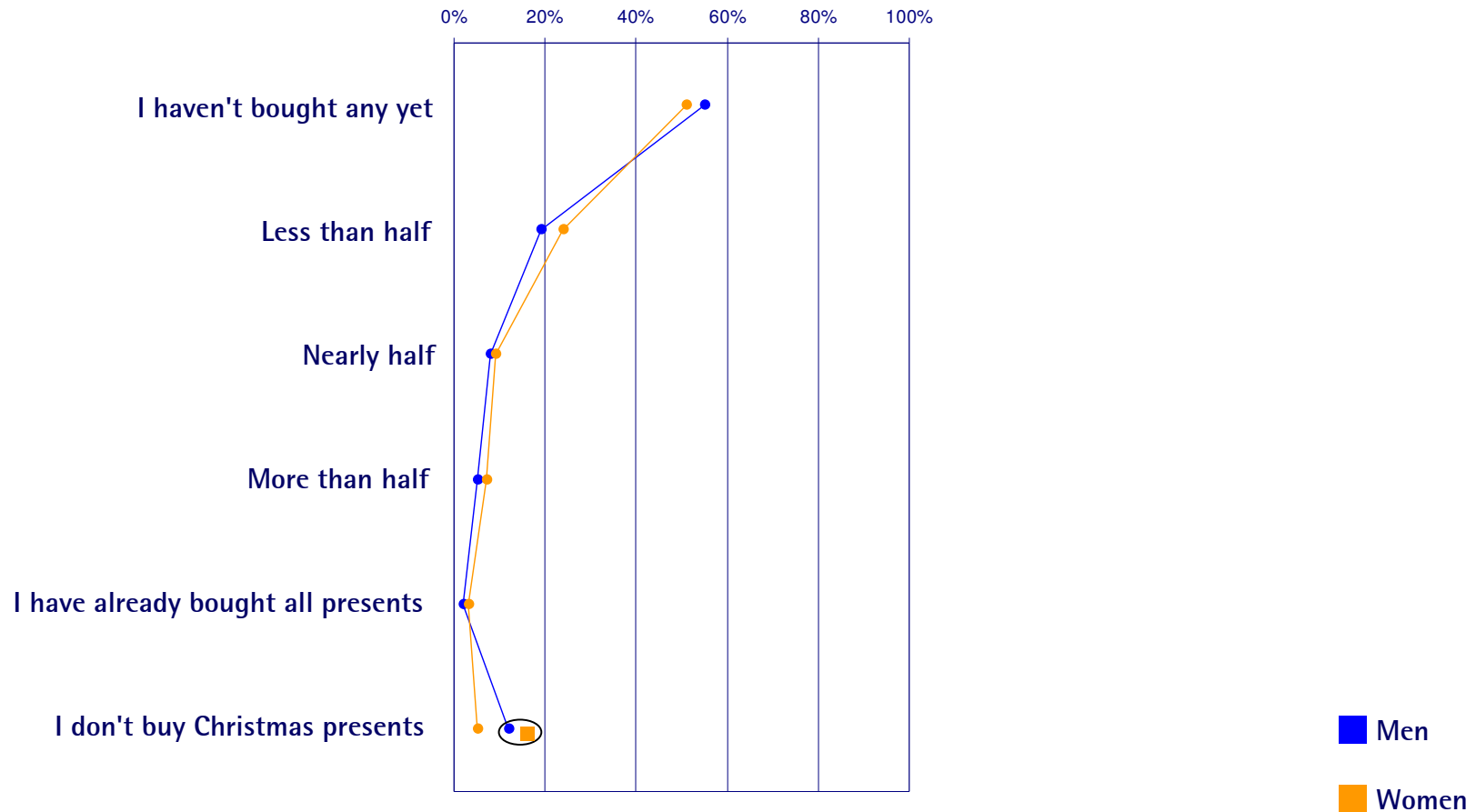


Base: n = 1,000 interviewees each in 2008 and 2009. There is a slight difference in the sample split concerning gender in comparison to 2008. In 2008, some of the interviewees were over 70, in 2009 there were only respondents aged 17 to 69. Results were assessed according to the quotes of 2008 to guarantee comparability.

# Presents Purchased Split according to Gender - 2009

Christmas and Financial Crisis

## How many Christmas presents have you already purchased?



Base: n = 1,000 interviewees

Men are more likely not to buy Christmas presents than women.

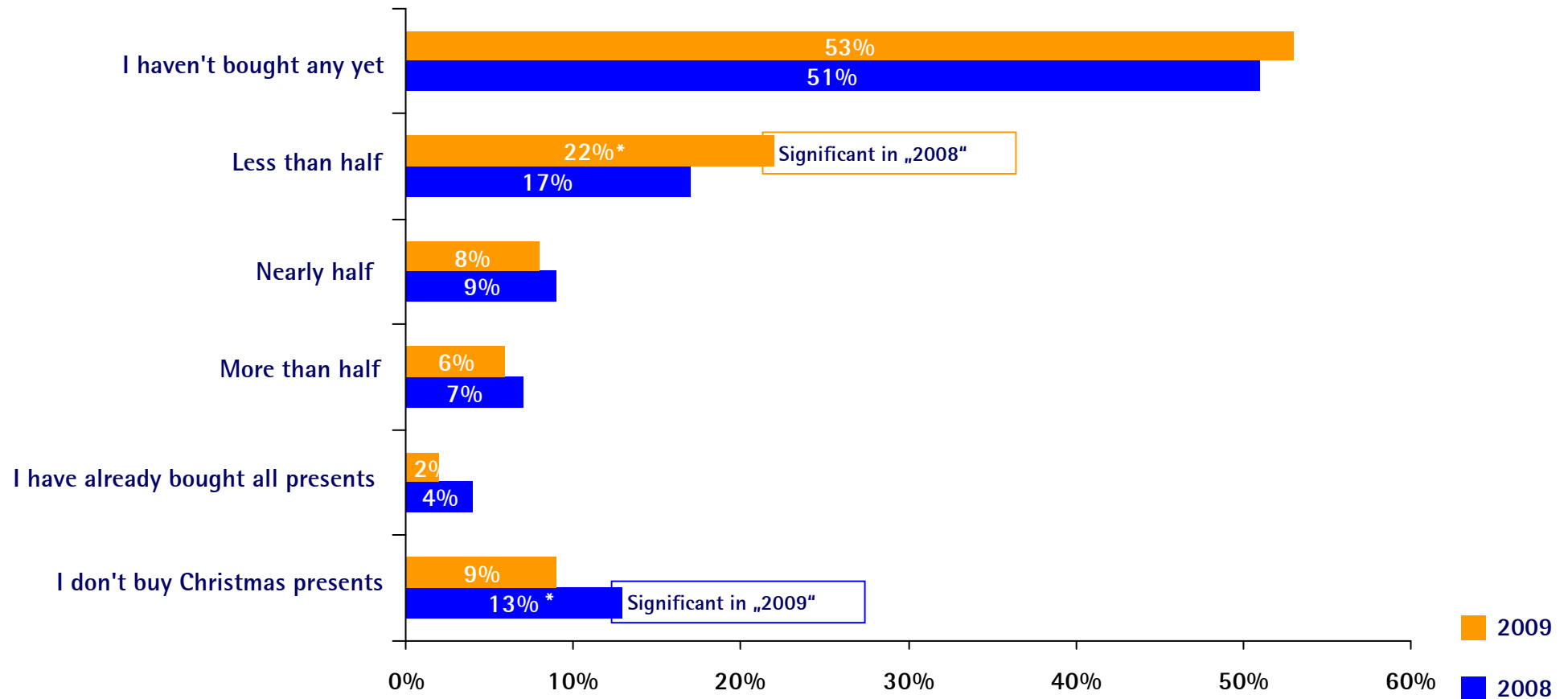
□ The colour of the box indicates its significance

# Presents Purchased

## Split according to 2008 / 2009

Christmas and Financial Crisis

How many Christmas presents have you already purchased?



Base: n = 1,000 interviewees each in 2008 and 2009

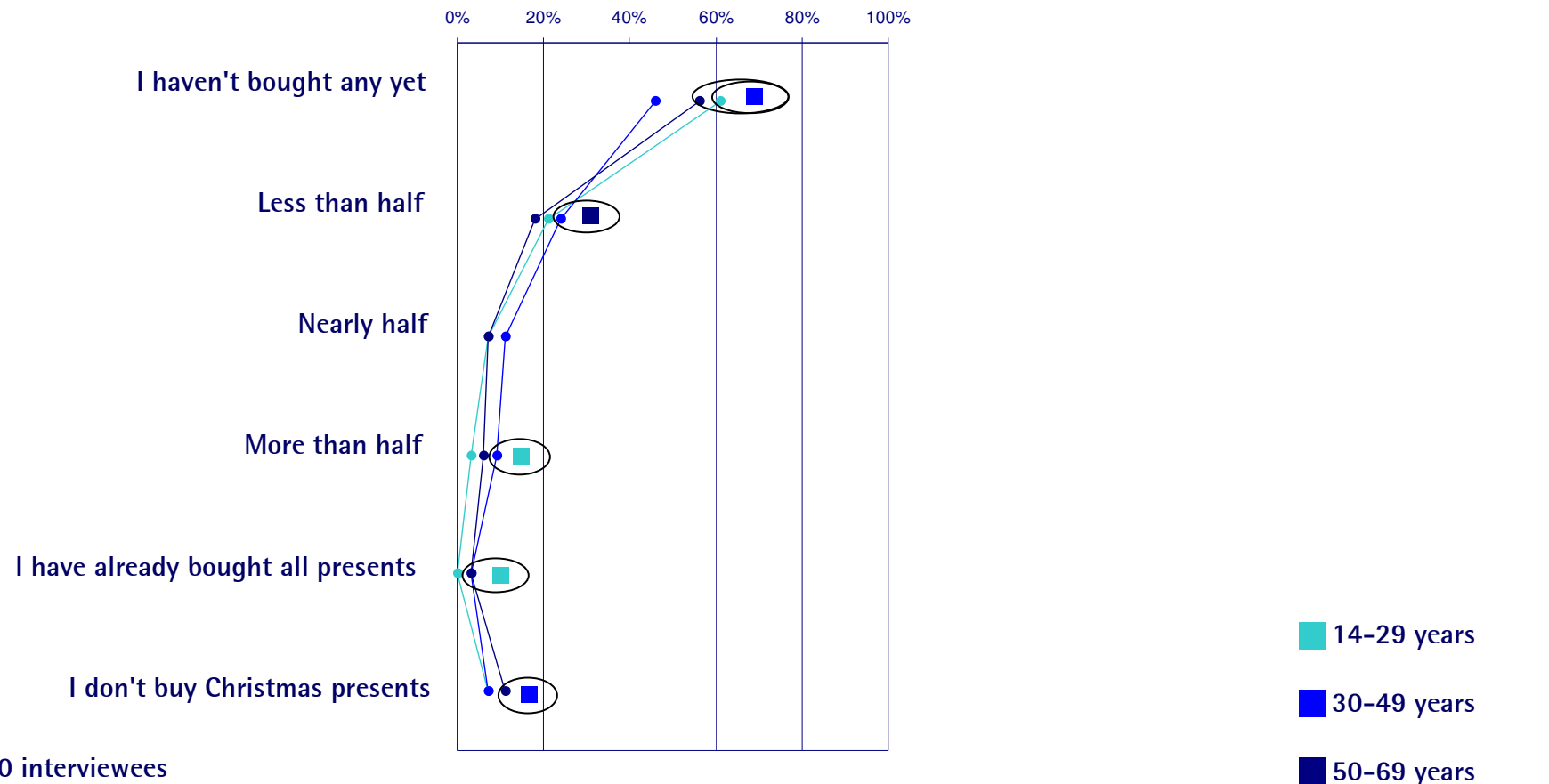
The purchase of Christmas presents appears to happen more slowly in 2009 than in 2008. Nevertheless, in 2009 more consumers are willing to buy presents in comparison to last year.

\* The asterisk signifies that this value is significant on a 95 percent level.

# Presents Purchased Split according to Age - 2009

Christmas and Financial Crisis

## How many Christmas presents have you already purchased?



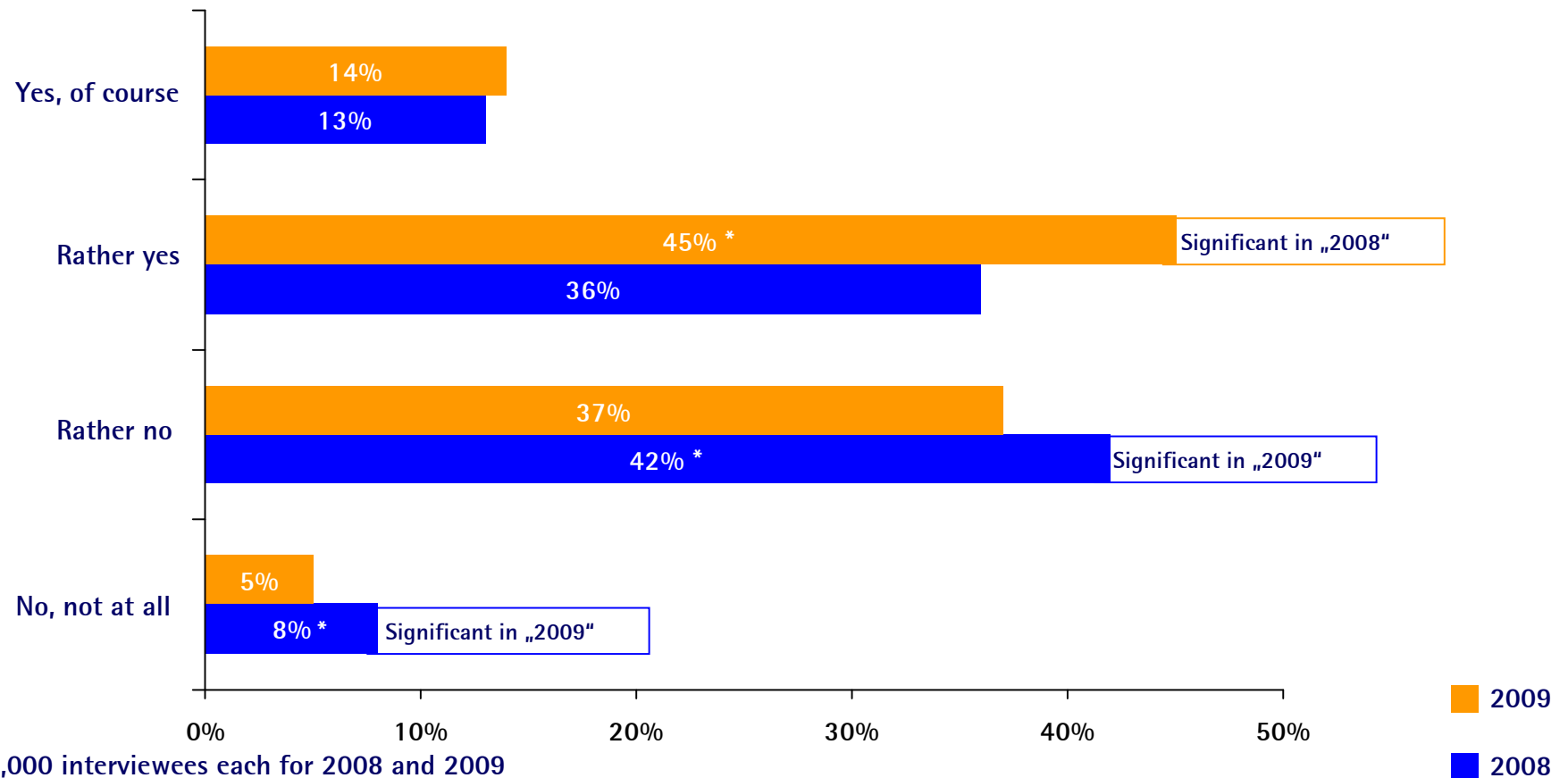
Base: n = 1,000 interviewees

Those who have not bought any presents yet are mostly aged between 14 and 29 or between 50 and 69. In comparison to other age groups, the 50 to 69 year-olds are more inclined to buy no Christmas presents at all.

# Reduced Items Split according to 2008 / 2009

Christmas and Financial Crisis

Do you think that there will be more reduced items before Christmas this year than in the previous years?



Consumers expect more reduced items this year in comparison to last year.

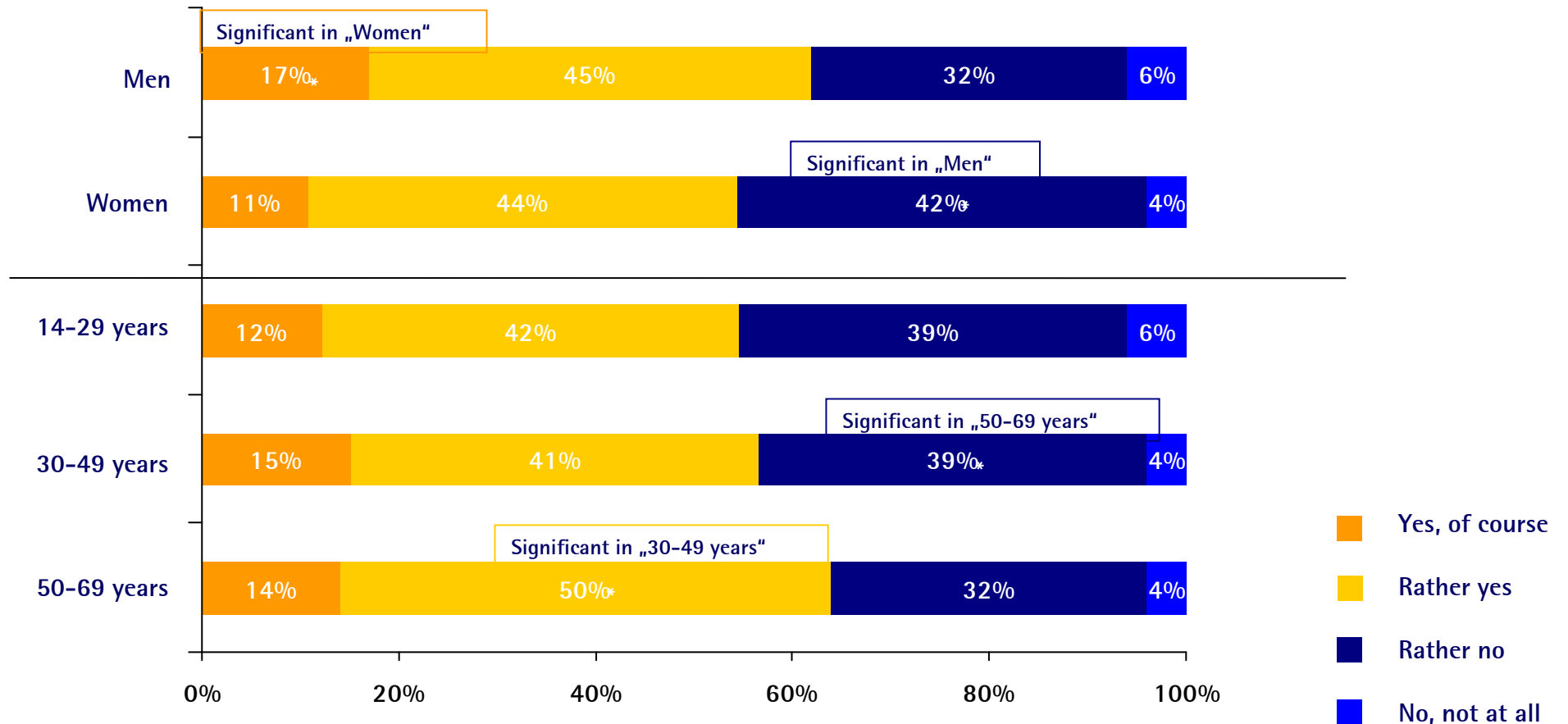
\* The asterisk signifies that this value is significant on a 95 percent level.

# Reduced Items

## Split according to Gender and Age - 2009

Christmas and Financial Crisis

Do you think that there will be more reduced items before Christmas this year than in the previous years?



Base: n= 1,000 interviewees

Especially men and those aged between 50 and 69 expect reduced items.

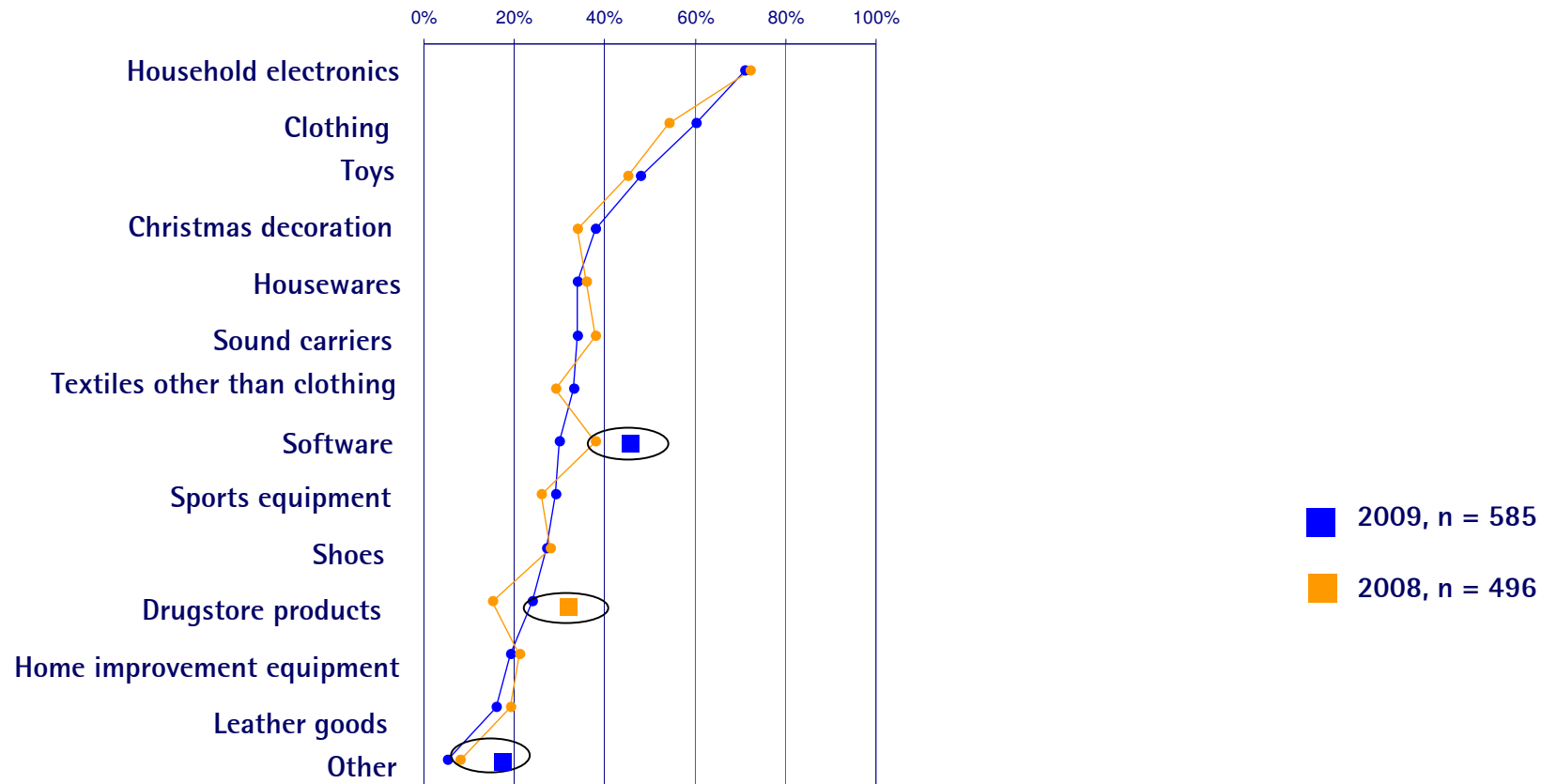
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# Reduced Items in Detail

## Split according to 2008 / 2009

Christmas and Financial Crisis

For which of the following items do you expect increased discounts and special prices before Christmas?



Base: n = refer to the right for those who expect more reduced items; multiple answers possible

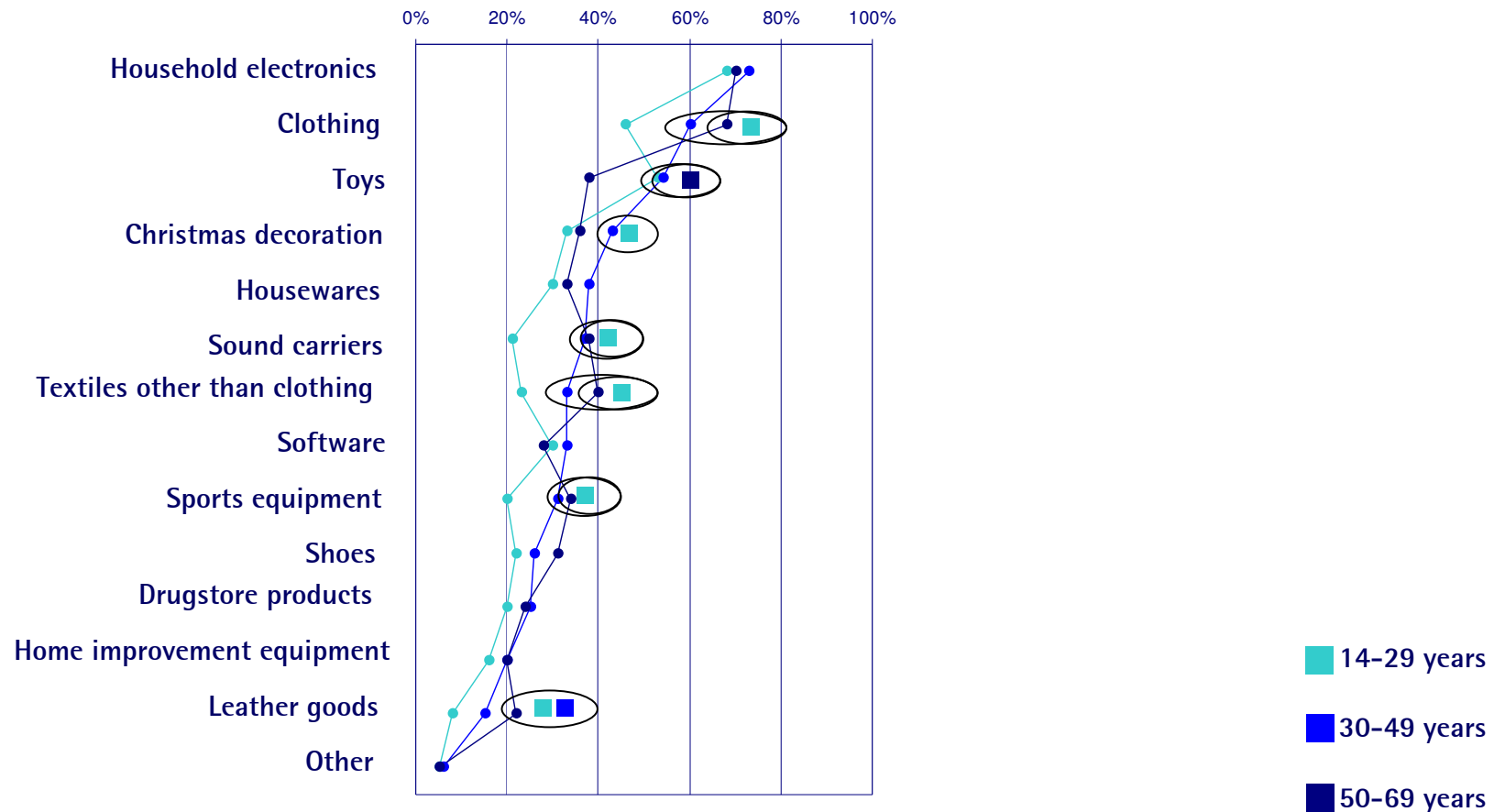
In general, items expected to be reduced in price are similar to those in the preceding year. Discounts are most likely to be expected concerning drugstore products.

□ The colour of the box indicates its significance

# Reduced Items in Detail

## Split according to Age - 2009

For which of the following items do you expect increased discounts and special prices before Christmas?



Base: n = 585 interviewees, who expect increased reduced items; multiple answers possible

Those aged 14 to 29 are less inclined to expect discounts than consumers older than 30.

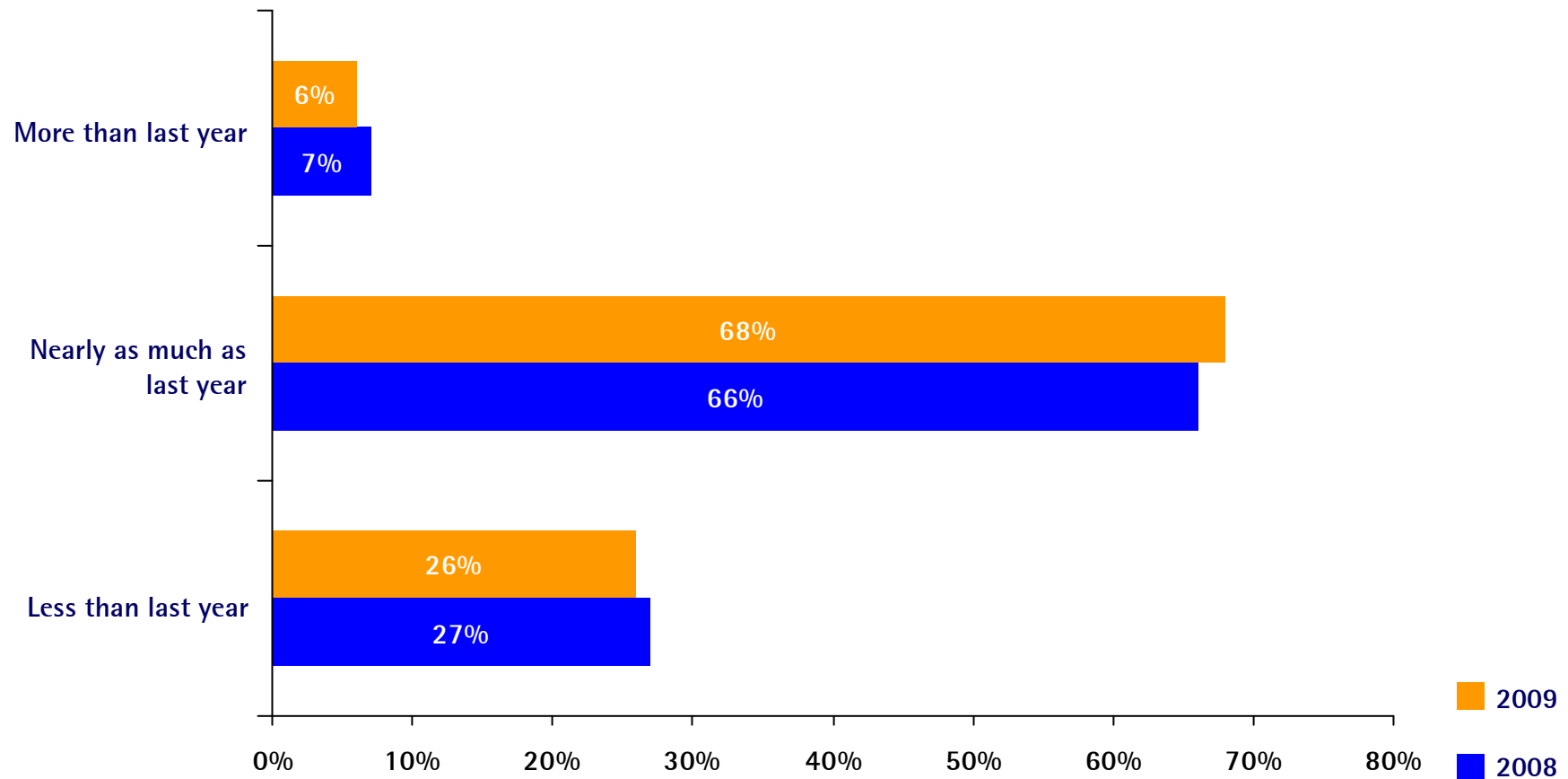
□ The colour of the box indicates its significance

# Expenses

## Split according to 2008 / 2009

Christmas and Financial Crisis

How much money do you spend on this year's Christmas presents?



Base: n = 874 interviewees in 2008 and 915 interviewees in 2009 who buy Christmas presents

Similar to last year, expenses for Christmas presents are decreasing.

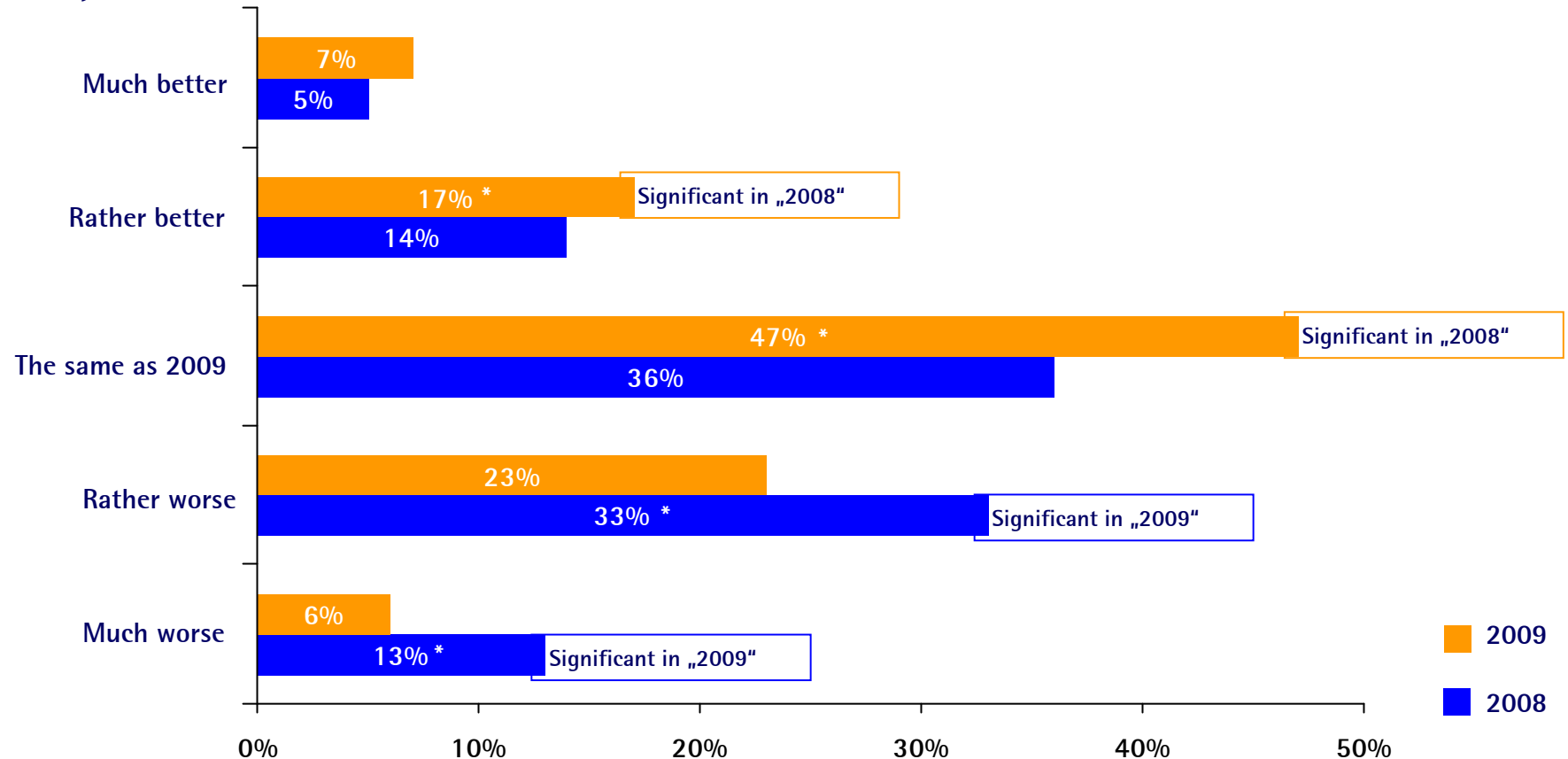
\* The asterisk indicates that the value is significant on a 95 percent level.

# Prospects for Next Year

## Split according to 2008 / 2009

Christmas and Financial Crisis

If you were to give an outlook for 2010, how do you expect your financial situation to be compared to 2009 (2008)?



Base: n = 1,000 interviewees each in 2008 and 2009

The outlook for 2010 is not as negative as the one given last year for 2009.

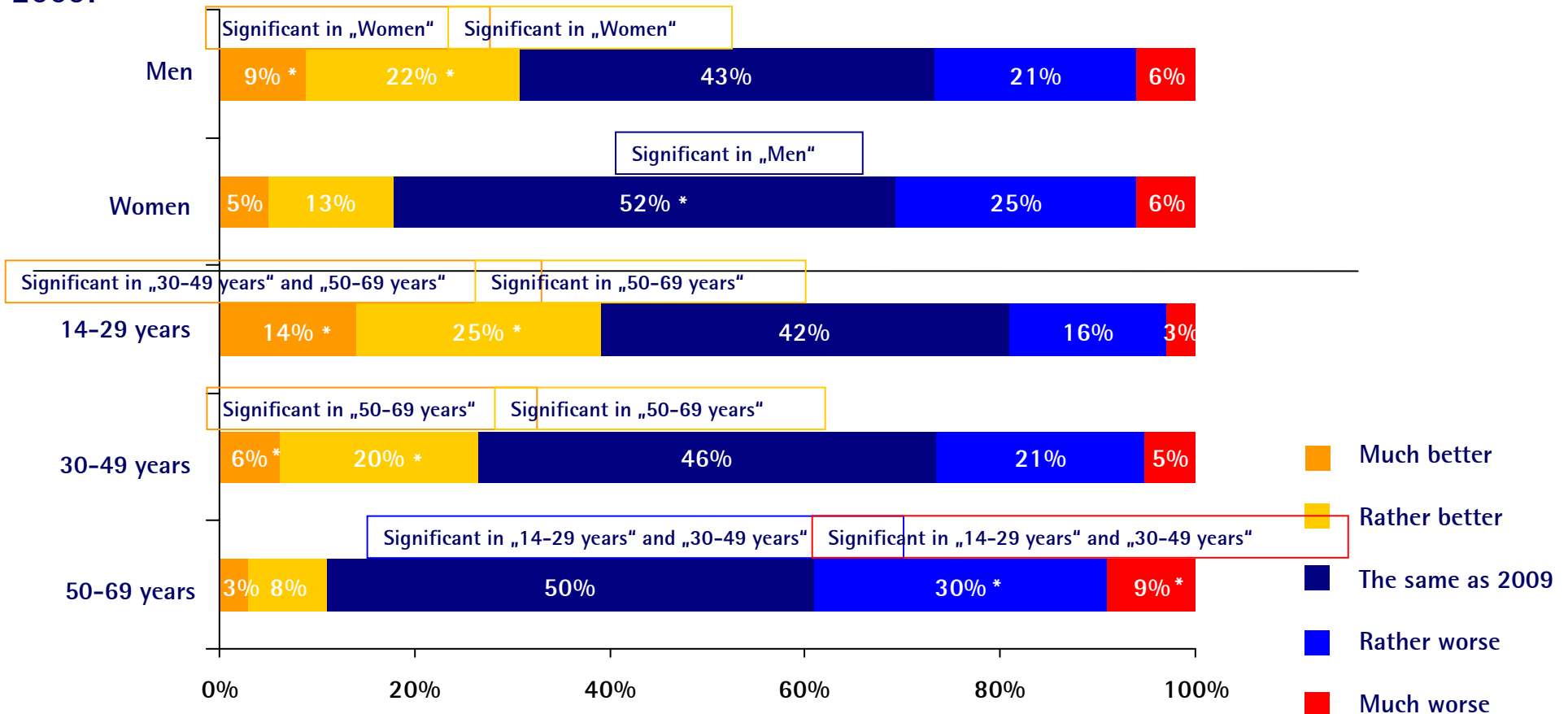
\* The asterisk indicates that the value is significant on a 95 percent level.

# Prospects for Next Year

## Split according to Gender and Age - 2009

Christmas and Financial Crisis

If you were to give an outlook for 2010, how do you expect your financial situation to be compared to 2009?



Base: n = 1,000 interviewees

The younger the consumers are, the more optimistic they look to the next year. Men are more optimistic than women.

\* The asterisk indicates that the value is significant on a 95 percent level

### Christmas and Financial Crisis

Despite an all-time high in government debt and a prediction of increasing unemployment figures, most Germans look quite optimistically to the year 2010. Nearly half of the consumers (47 percent) think that their financial situation will stay the same in 2010. A quarter (24 percent) even believes that it will improve. However, more than one quarter of the interviewees (29 percent) expect their financial situation to deteriorate. The younger respondents under 50 appear to be the most optimistic regarding their financial situation for 2010.

As last year, decreasing expenses for Christmas presents are to be expected. Last year 27 percent of the interviewees planned to spend less money than in the previous year. This year 26 percent will spend less than in 2008. Compared to last year, in 2009 more consumers expect reduced items before Christmas (2009 – 59 percent / 2008 – 49 percent). Men (62 percent) and those aged 50 to 69 (64 percent) have the highest expectations concerning reduced items. Similar to the preceding year, the top 3 items are household electronics (71 percent), clothing (60 percent) and toys (48 percent). Expectations are lower concerning reduced items as far as software is concerned and higher for drugstore products. For all other products expectations are nearly the same as last year.

In general, the purchase of Christmas presents appears somehow slower than in the previous year. While in mid-November of this year 22 percent said that they had bought less than half of the presents, last year only 17 percent said so. Nevertheless it is striking that this year more consumers plan to buy Christmas presents than last year. Only 9 percent indicate that they do not want to buy presents at all – compared to 13 percent last year.

Feel free to contact us!

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