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Sales season shopper insights and trends



About this report.

In December 2024, Worldline NZ reported a slight 0.7% dip in retail spending compared to the previous year. While transaction volumes increased across Worldline NZ's payments network, overall spending growth was more modest than in previous years, reflecting a cautious yet active consumer base.

With this in mind, we wanted to better understand how New Zealanders perceive their own spending and shopping habits.

To do so, we spoke to more than 800 Kiwis to discover how they're shopping during key sales periods, particularly over Black Friday and Christmas.

This report presents insights from our TellMe panelists, combined with industry data, to highlight the latest retail trends.



Shopping trends revealed.

Key insights from our latest TellMe survey

Kiwis have been shopping less, impacted by the cost-of-living crisis in 2024. More than half of respondents reported reducing their overall spending over the last 12 months, to December.



In December, Kiwis bought more overall, with transaction numbers up (+0.8%), but the amount spent per item decreased.*



Despite tough economic conditions in the last year, when it comes to Christmas, 58% of Kiwis intended to maintain their gift spending levels, with an average spend of \$616 in 2023.



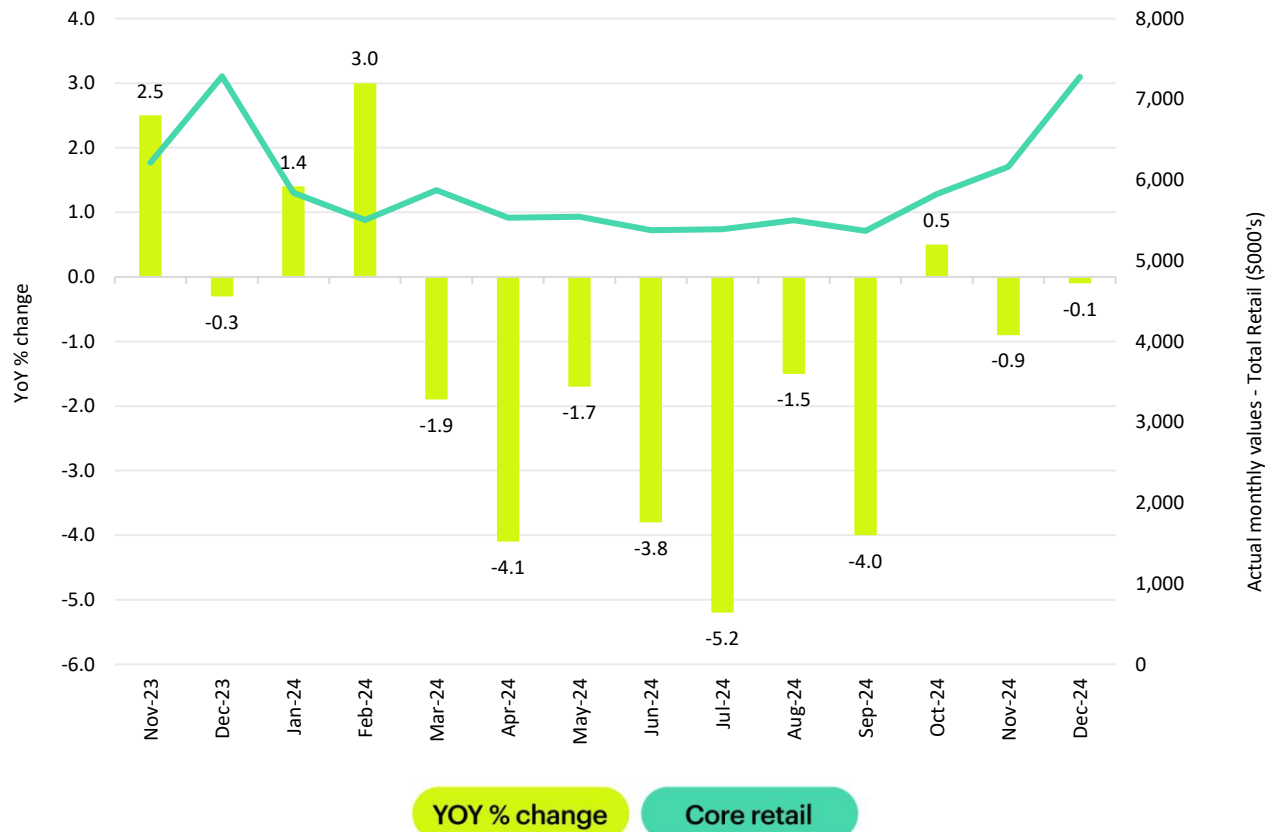
Over 80% of Kiwis' purchase decisions are influenced by advertising, with competitive pricing and special deals being key drivers.



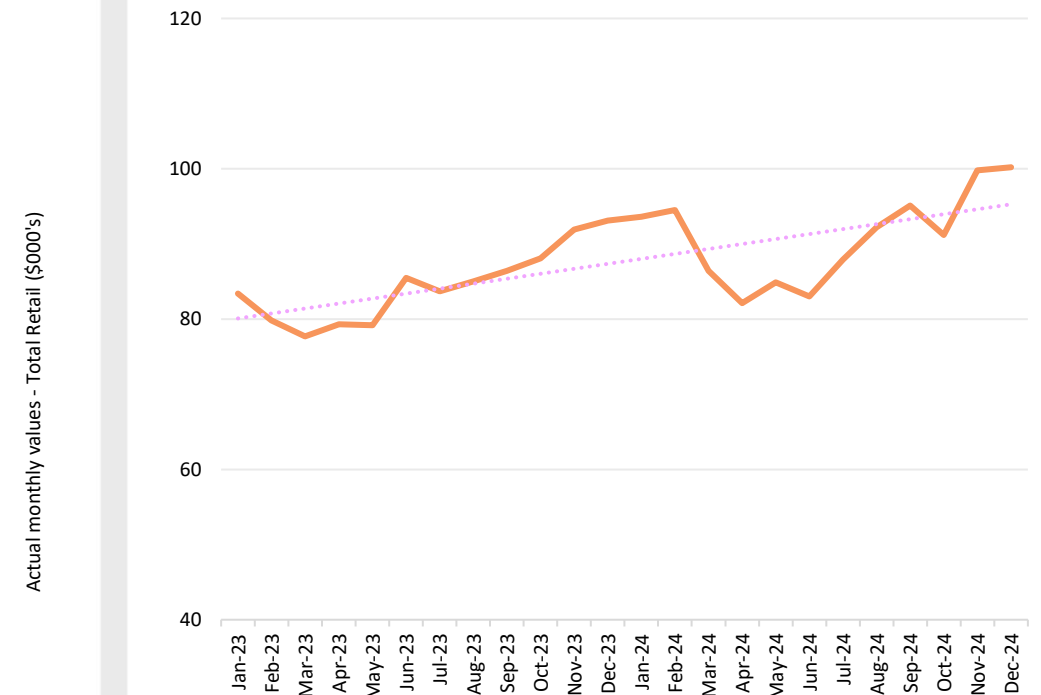
Kiwis are rediscovering their confidence to spend.

While over half of respondents (53%) reported spending less over the last year and turning to online shopping for deals, we are seeing encouraging signs of recovery with a noticeable lift in late 2024.

Core retail electronic card transactions*



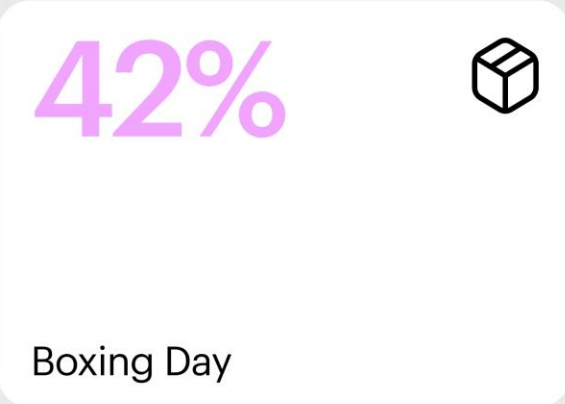
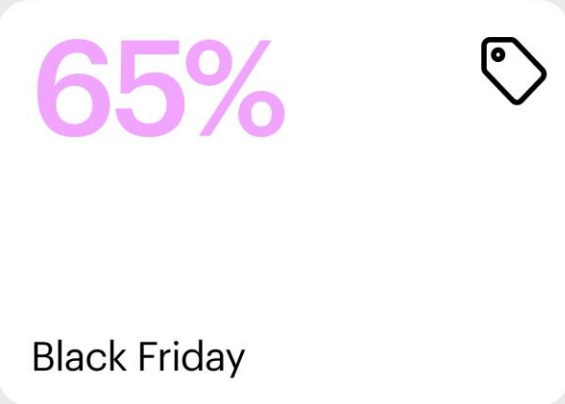
Consumer confidence 2023-24^



Key sales periods drive purchases for Kiwis.

78% have shopped Black Friday or Christmas sales in the last two years, with Black Friday the most popular sales period

Have you shopped during any of these sales periods in the past two years? (Select all that apply)



Shopper insights:

54% told us they think key sales periods are ideal times to buy big ticket items & 1 in 4 always try to wait for these sales to purchase. Age and gender play a part in consumers likelihood to shop:

18-34 Always will wait until a sale period	25-54 and females Sometimes, if they can wait	45-64 and males Won't wait, will buy when convenient
------------------------------------------------------	---------------------------------------------------------	----------------------------------------------------------------



Source: TellMe Shopping Survey December 2024 n=821



Shopping barriers during key sales periods.

What challenges, if any, do you face when shopping during sales periods like Easter, Labour Weekend, and Christmas? (Select all that apply)

57%

Crowded stores

35%

Limited availability of products/items

23%

Being overwhelmed by too many choices

17%

Delivery delays for online orders

39%

Seeking out who has the best deals/discounts

30%

Finding the time to shop amongst other activities/plans

4%

Other

29%

Staying within my budget

4%

None of the above

Shopper insights:



Aside from crowded stores, finding the best deal or discounts is the main challenge for Kiwi shoppers during a sales period.

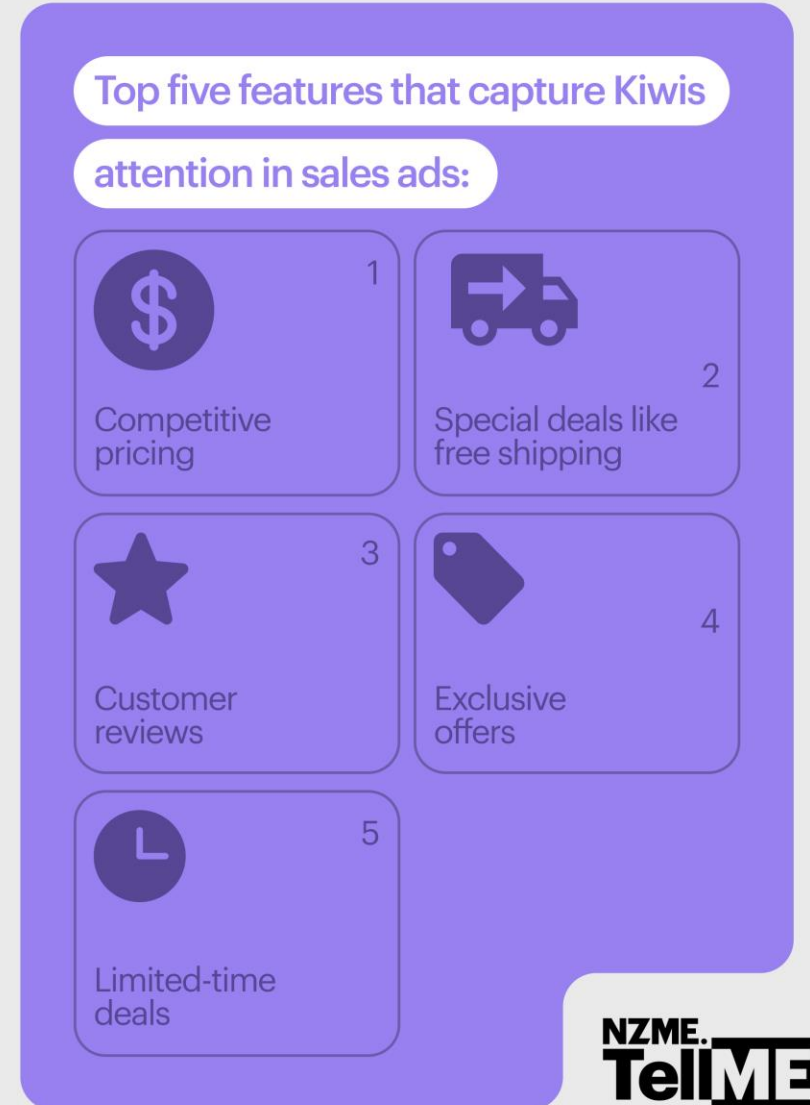
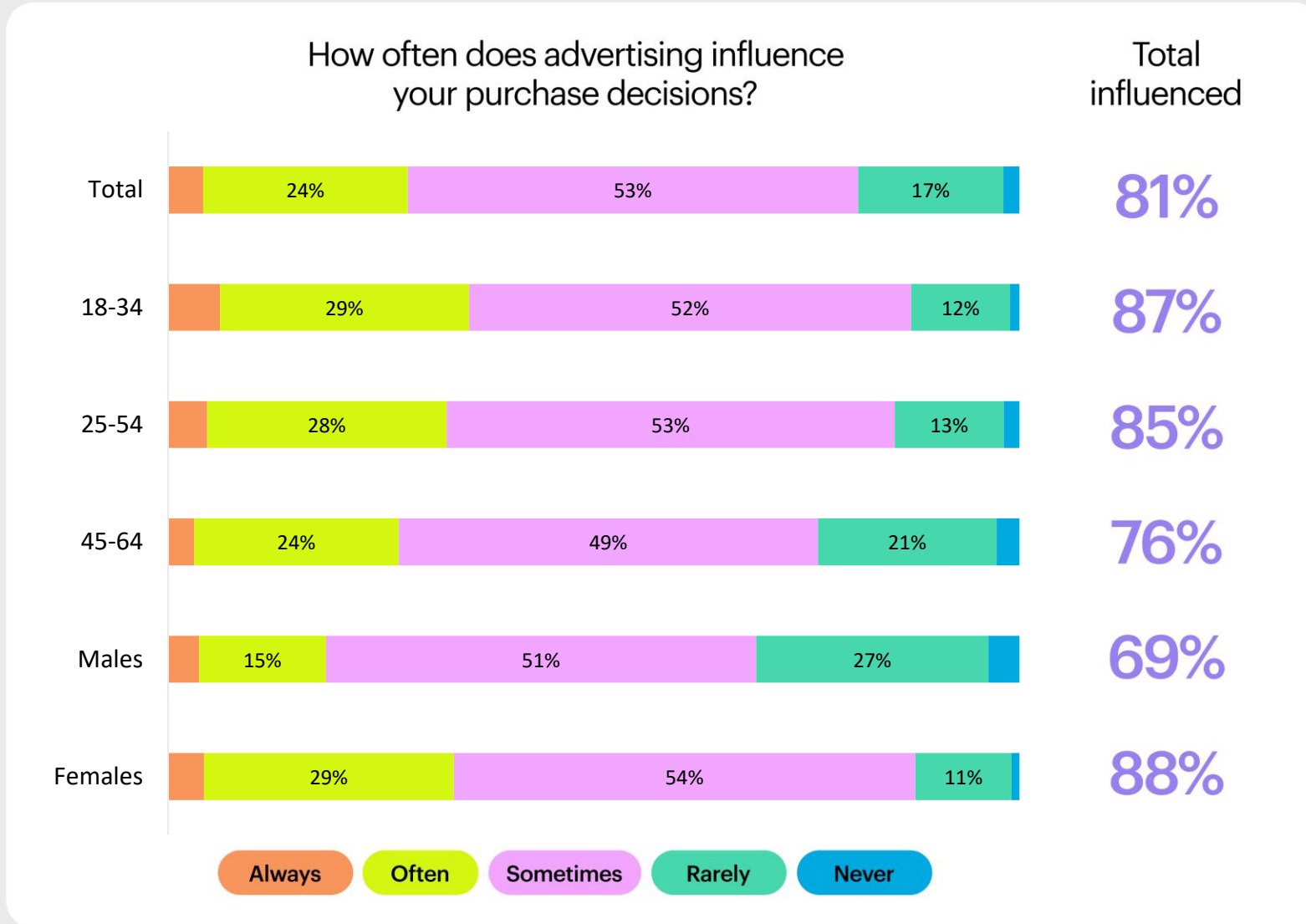


Females are particularly concerned about crowded stores and finding the time to shop amongst other plans.



18-34 year olds are more concerned about being overwhelmed by too many choices, seeking out the best deals/discounts and availability of products/items.

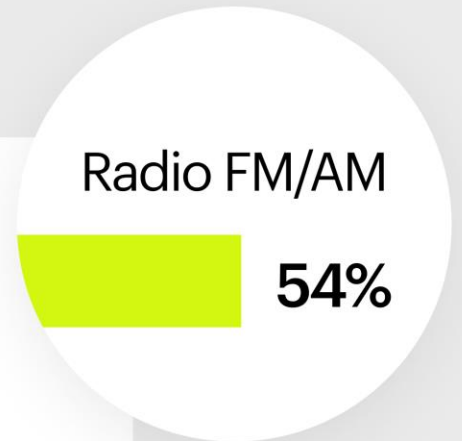
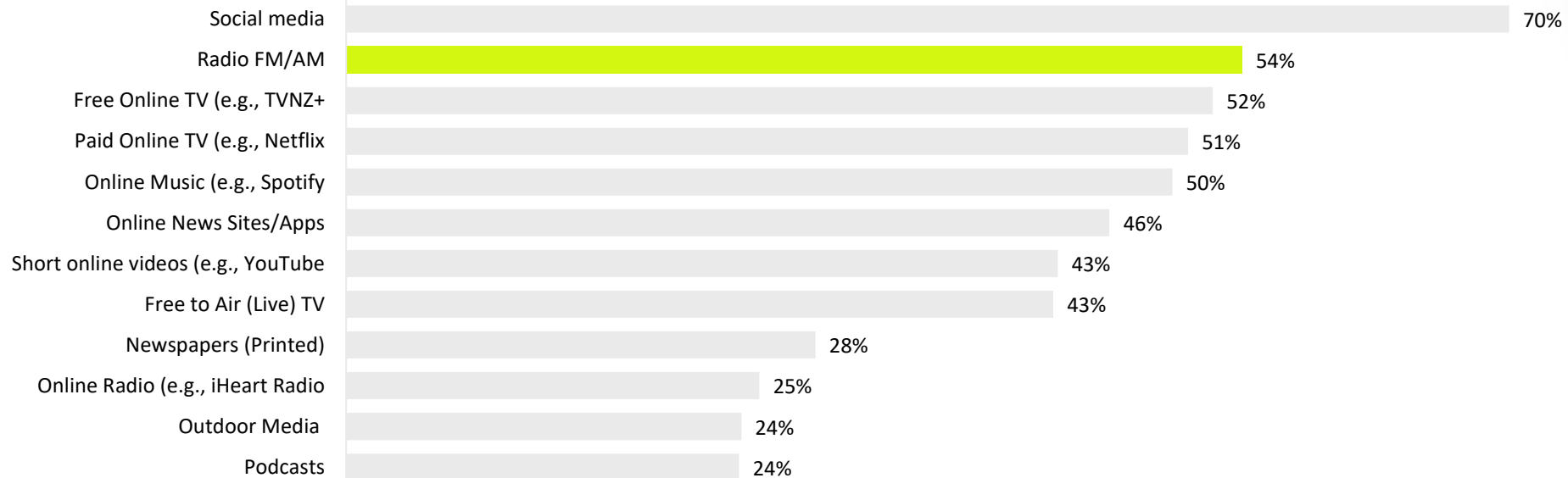
Attention driving advertising.



Radio drives online advertising effectiveness.

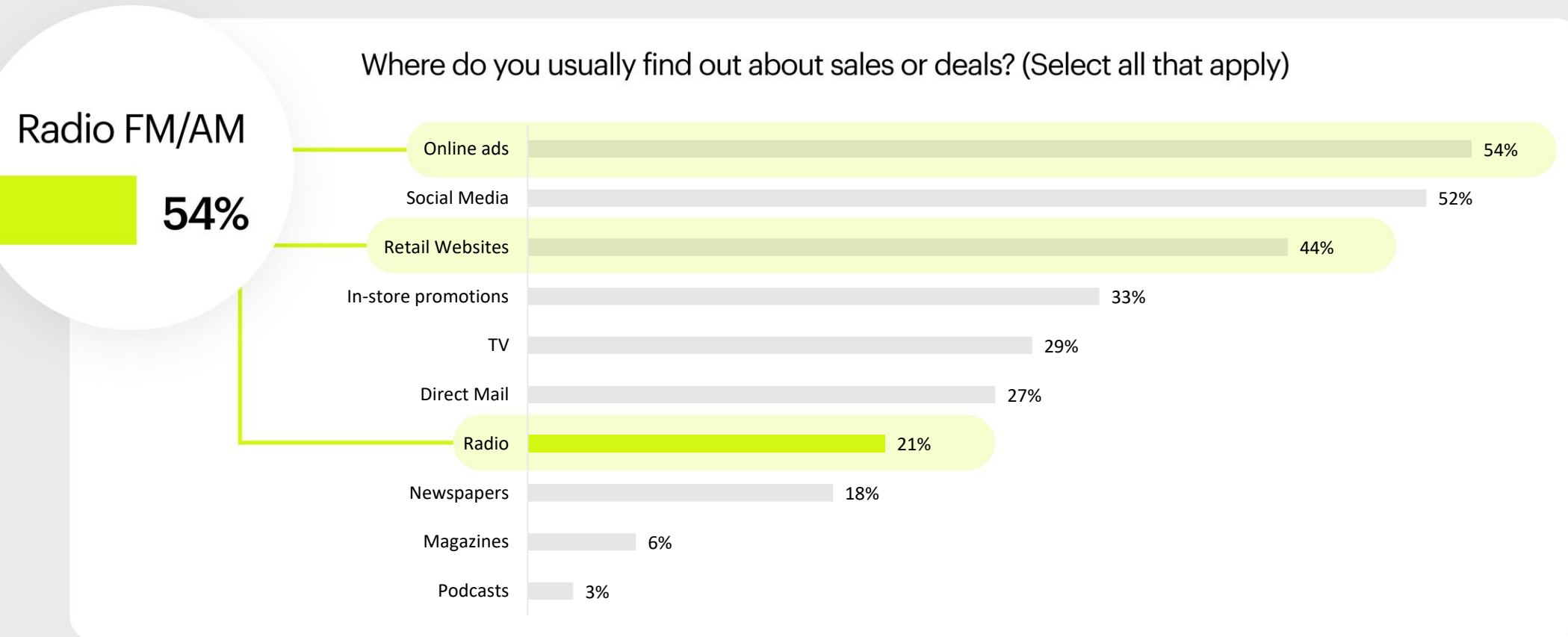
Although radio may not be directly attributed to advertising recall, it stands out as the second most used medium in the past week, highlighting its role in driving online attention and attribution. Radio generates an average +14% increase in website traffic.*

Which of the following have you read, visited, watched, seen, or listened to in the past week? (Select all that apply)



Radio drives online advertising effectiveness.

Although radio may not be directly attributed to advertising recall, it stands out as the second most used medium in the past week, highlighting its role in driving online attention and attribution. Radio generates an average +14% increase in website traffic.*



Source: TellMe Shopping Survey December 2024 n=821 *Source: LeadsRx Attribution Studies, 17 Campaigns 2019-2023



Black Friday...
Fortune
favours the
shoppers.



Black Friday is the most popular sales period.

65% of Kiwis have made a Black Friday purchase in the past two years, with 58% buying something during the 2024 sales

Most likely shoppers

81%

18-34

76%

25-54

70%

Females

Motivations to shop during Black Friday

It was an opportunity to buy things I want

58.6%

To get a good deal before Christmas

47.5%

Starting Christmas shopping early

34.3%

I didn't want to miss out on good deals

25.7%

Shopper insights:

67%

Males are more likely to take the opportunity to buy things they want during Black Friday.

58%

18-34-year-olds are more likely to look for a good deal before Christmas.

40%

41%

Females (40%) & 18-34-year-olds (41%) are more likely to start Christmas shopping early.

The most purchased categories in Black Friday sales.



49%
Clothing &
Footwear



37%
Electronics/
Technology



26%
Toys &
Games



25%
Beauty



15%
Health



10%
Furniture



9%
Gardening



9%
Books



8%
Jewellery



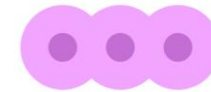
7%
Whiteware



6%
Travel



3%
Auto



12%
Other

Other mentions included: Food, Alcohol, Pet items,
Sporting equipment, Bedding, Tools, Homeware

Black Friday... Fortune favours the shoppers.

Black Friday is the most popular sales period, with 65% having bought something during this sales period in the last two years.



During Black Friday weekend, \$175.6 million was spent on retail.

While New Zealanders purchased more items overall, they spent slightly less per purchase, keeping total spending in line with the year prior.*



58% of Kiwis bought something during the Black Friday sales in 2024.



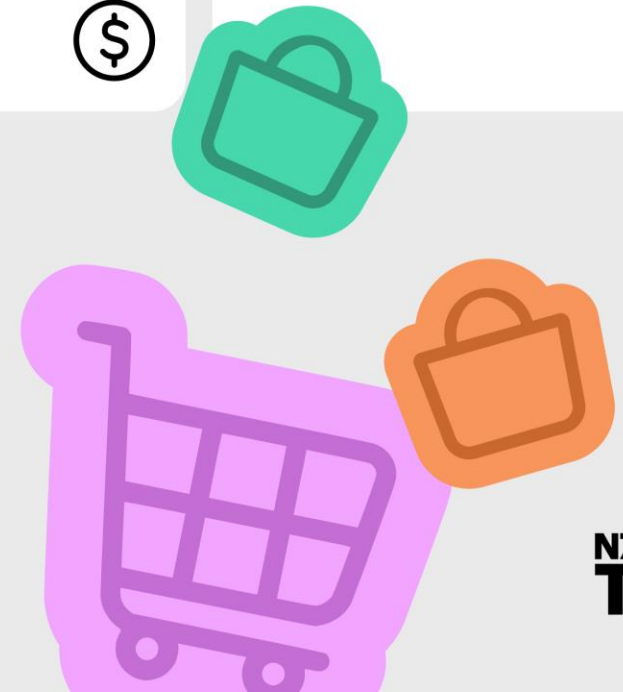
The top three categories purchased were:

-  Clothing & footwear
-  Electronics/technology
-  Toys & games



The top reasons for shoppers to buy during Black Friday sales:

1. It was an opportunity to get wanted items
2. To get a good deal before Christmas

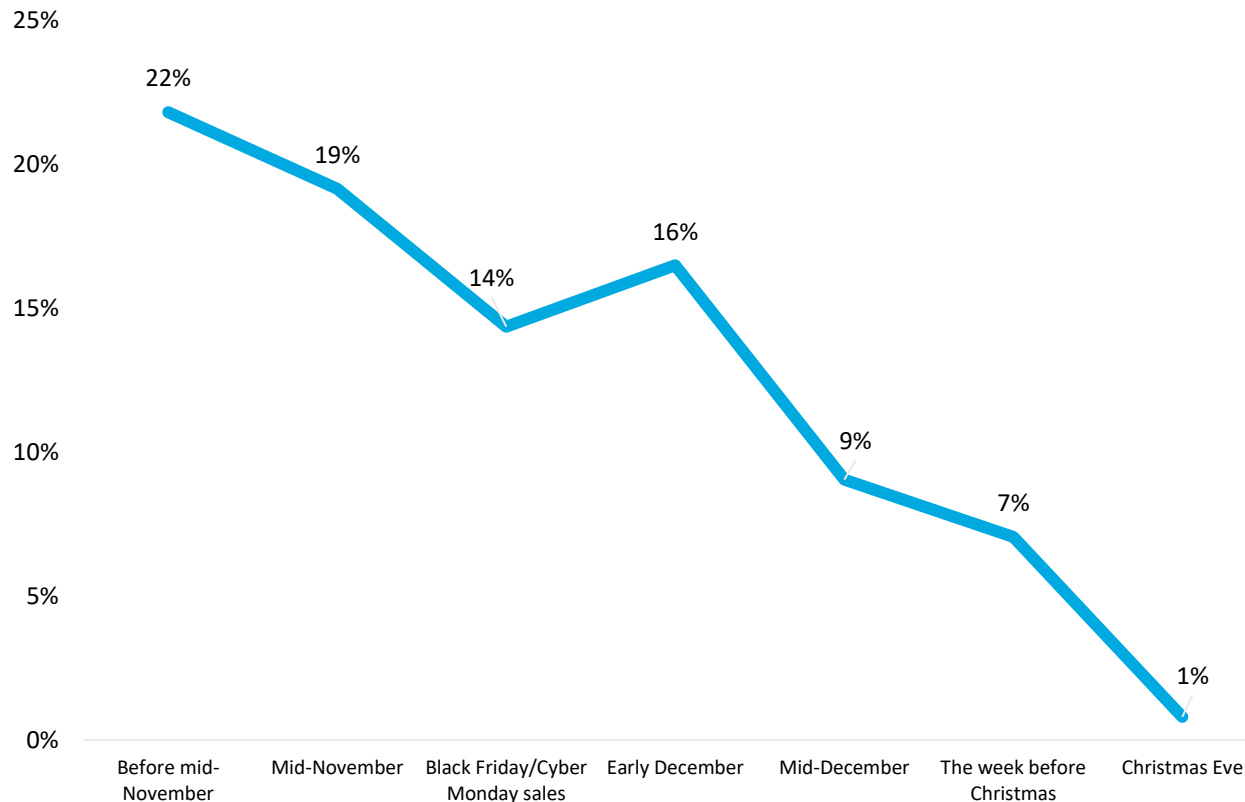


Unwrapping Christmas shopping.



Over half of Kiwis began Christmas shopping before December.

When do you usually start your Christmas shopping?



Shopper insights:

Females are more likely to be getting sorted early with 63% starting before December. They're also more likely to be looking for gifts year-round and often overspend.

Males are more likely to get it all done in one day and at the last minute.



Christmas is on our minds year-round.

40% of people are searching for gift ideas throughout the year and 26% report they complete all their shopping before December

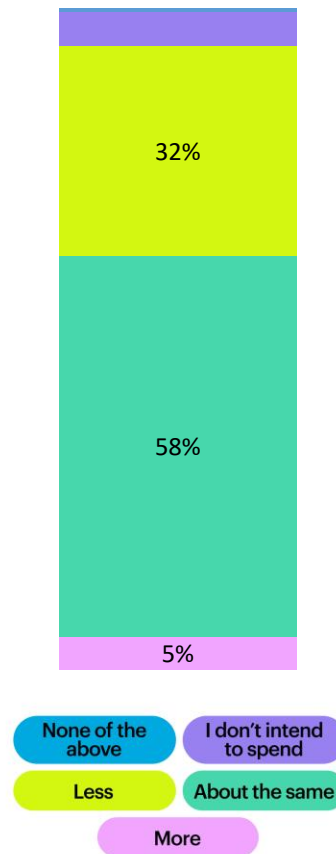


Despite economic challenges, over half of Kiwis plan to maintain their Christmas gift spending from last year.

Average spend on Christmas gifts

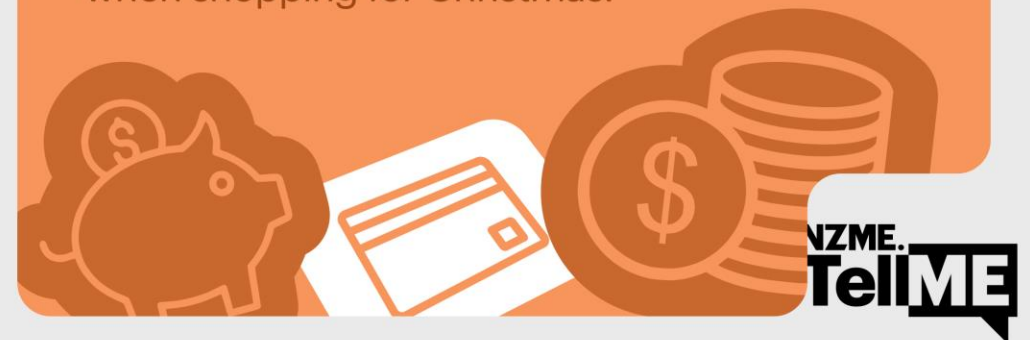


Intended spend on Christmas gifts



Shopper insights:

- The average spend in 2023 on Christmas gifts was \$616 and those aged 25-54 spent significantly more, with an average spend of \$705.
- 58% intend to spend about the same this year on Christmas gifts, stating they have set the same budget as last year. Almost a third say they intend to spend less.
- 15% of Kiwis say they tend to overspend and 28% say they will stick to a budget when shopping for Christmas.



The categories topping Christmas sales wishlists.



57%
Clothing &
Footwear



40%
Toys &
Games



34%
Electronics/
Technology



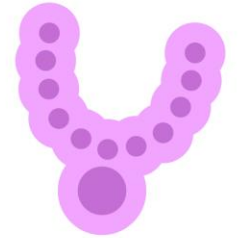
30%
Beauty



19%
Health



18%
Gardening



14%
Jewellery



11%
Books



9%
Travel



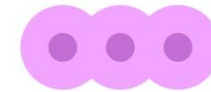
7%
Furniture



4%
Whiteware



4%
Auto



15%
Other

Other mentions included: Food, Alcohol, Vouchers

Unwrapping Christmas shopping.

In December, New Zealanders spent \$3.2 billion on retail items, purchasing more items overall but spending slightly less per transaction, keeping total spending nearly in line with the previous year (-0.7%).*



55% started their Christmas shopping before December, with females more likely to think of gift ideas for Christmas throughout the year.



The average spend on Christmas gifts in 2023 was \$616, with those aged 25-54 spending significantly more (\$705).



58% of Kiwis intended to spend about the same this year on Christmas gifts, stating they have set the same budget as last year, but 15% of Kiwis say they tend to overspend when shopping for Christmas.

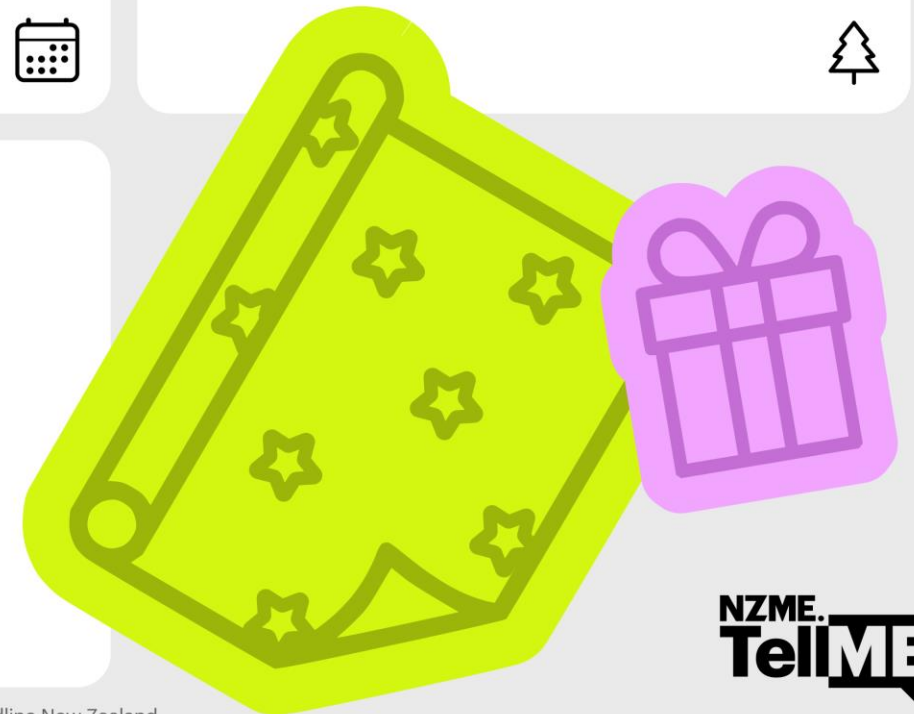


The top three categories people were intending to buy for Christmas were:

 Clothing & Footwear

 Toys & Games

 Electronics/Technology




Demographic profiles.




18-34: Social shoppers

Shopping habits

- 18-34's are more likely to identify as social shoppers 'I shop with friends & family', but the top shopper types they describe themselves as are the same as the average Kiwi:

 Bargain shoppers (70%)

 Researchers (65%)

 Recreational shoppers (28%)

- They are more likely to prefer shopping online only or shopping both online & instore (as opposed to instore only).
- They will wait for sales to purchase (78%) and are more likely to be using buy-now, pay-later or personal savings upfront when buying major items.

Sales shopping

- 72% bought something in the Black Friday sales 2024, to get a good deal before Christmas.
- They usually start Christmas shopping in mid-November or during the Black Friday sales, however 43% are looking for gifts throughout the year.
- They are 75% more likely than average to say they intended to spend more on Christmas gifts in 2024 than the previous year.
- Furniture, Jewellery, & Travel are the top three categories 18-34 year olds are more likely to be shopping for.

Sales advertising

- 87% are influenced by advertising in their purchase decisions.
- They are more likely to be finding out about sales/deals on social media, from in-store promotions and are more than twice as likely to be finding out about sales from podcasts.
- Limited time deals and eye-catching designs are more likely to influence this group when it comes to sales advertising.

25-54: Impulse buyers

Shopping habits

- 25-54's are more likely to say they are impulse buyers 'I buy on the spot', but the top shopper types they describe themselves as are the same as the average Kiwi:
 - 🏷️ Bargain shoppers (68%)
 - 🔍 Researchers (56%)
 - 🛒 Recreational shoppers (26%)
- They will wait for sales to purchase from their favourite stores (77%) and think that sales periods are a good time to buy major items (64%).
- They are more likely to prefer shopping online only or both online & instore (as opposed to instore only) and have been shopping more online in the last year to find cheaper options (41%).

Sales shopping

- 67% bought something in the Black Friday sales 2024.
- While 41% of 25-54's are looking for Christmas gifts throughout the year, they are more likely than average to do their Christmas shopping at the last minute (26%) and be buying gifts on impulse.
- They are top spenders: spending +14% more than the average Kiwi in 2023 on Christmas gifts, with an average spend of \$705.
- Toys/Games, Electronics/Technology, & Whiteware are the top three categories this demo are more likely to be shopping for.




Sales advertising

- 85% acknowledge their purchase decisions are influenced by advertising.
- They are more likely to be finding out about sales/deals online, from social media, online ads & retail websites.
- Special deals, competitive pricing & customer reviews are most attention grabbing in a sales advertisement for those aged 25-54.

Females: Recreational shoppers

Shopping habits

- Females are more likely to identify as recreational shoppers 'I browse & window shop' but the top shopper types they describe themselves as are the same as the average Kiwi:

-  Bargain shoppers (68%)
-  Researchers (51%)
-  Recreational shoppers (29%)

- They are more likely to prefer shopping instore (30%) or both online & instore (52%).
- 71% will wait for sales to purchase from their favourite stores.

Sales shopping

- 61% bought something in the Black Friday sales 2024, to get a start on their Christmas shopping.
- They usually start Christmas shopping before December (63%), with 46% looking for gifts throughout the year and 1 in 5 saying they tend to overspend.
- Beauty, jewellery, & clothing & footwear are the top three categories Females are more likely to be shopping for.

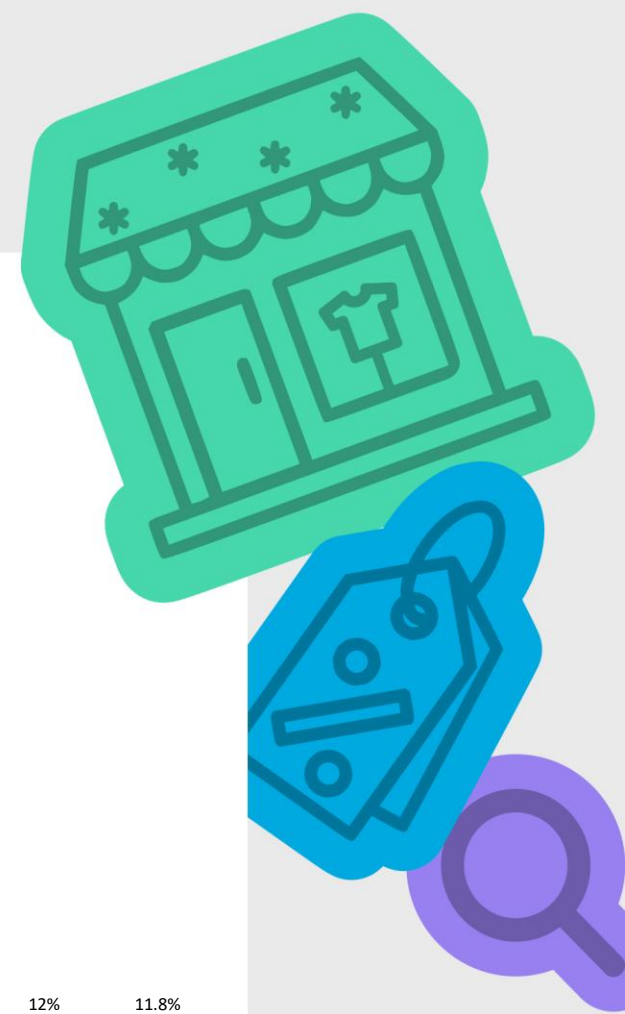
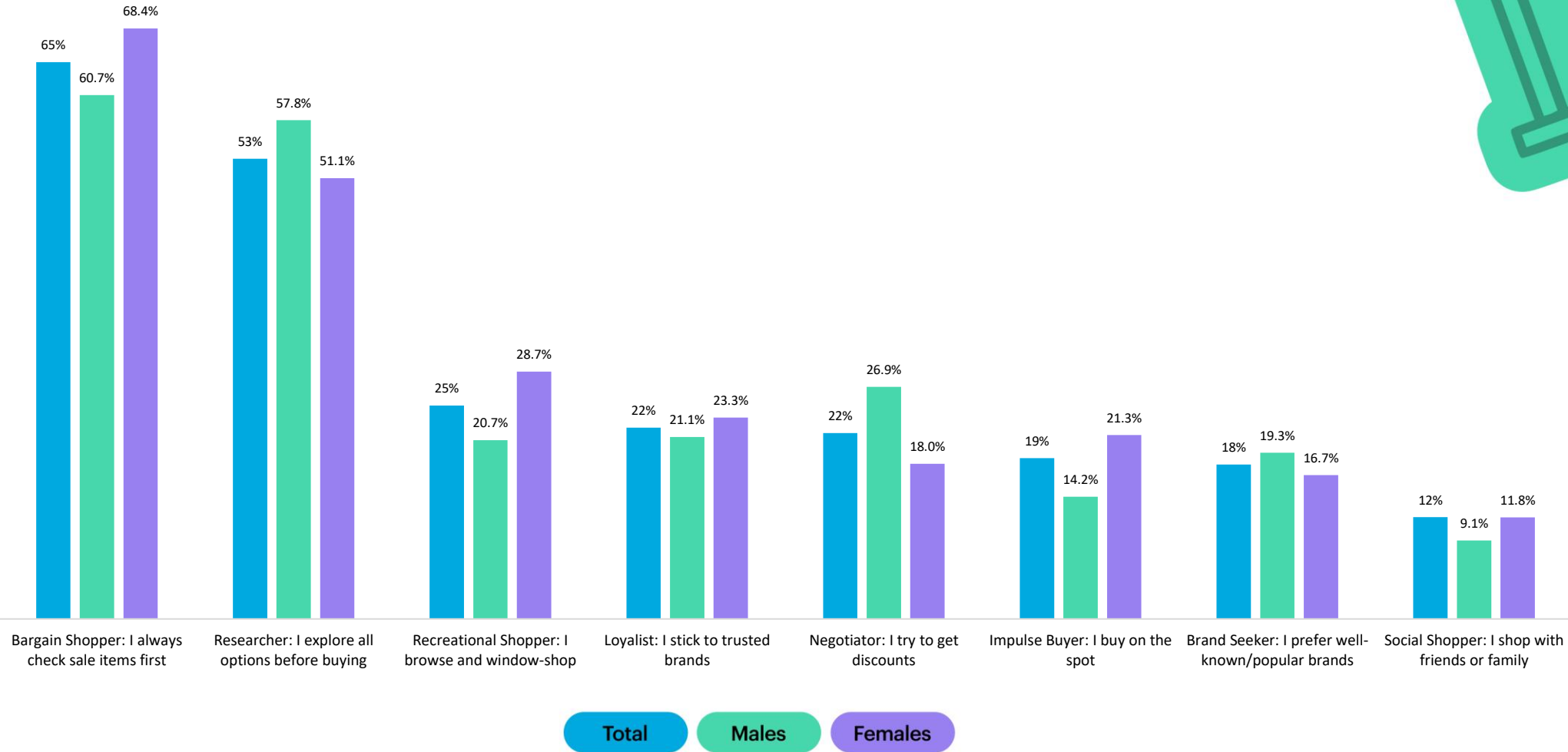
Sales advertising

- 88% are influenced by advertising in purchase decisions.
- They are more likely to be finding out about sales/deals on social media and direct mail.
- They are most likely to be influenced by special deals e.g. free shipping in sales advertising

Appendix.

Shopper personas.

How would you describe yourself as a shopper? (Select all that apply)

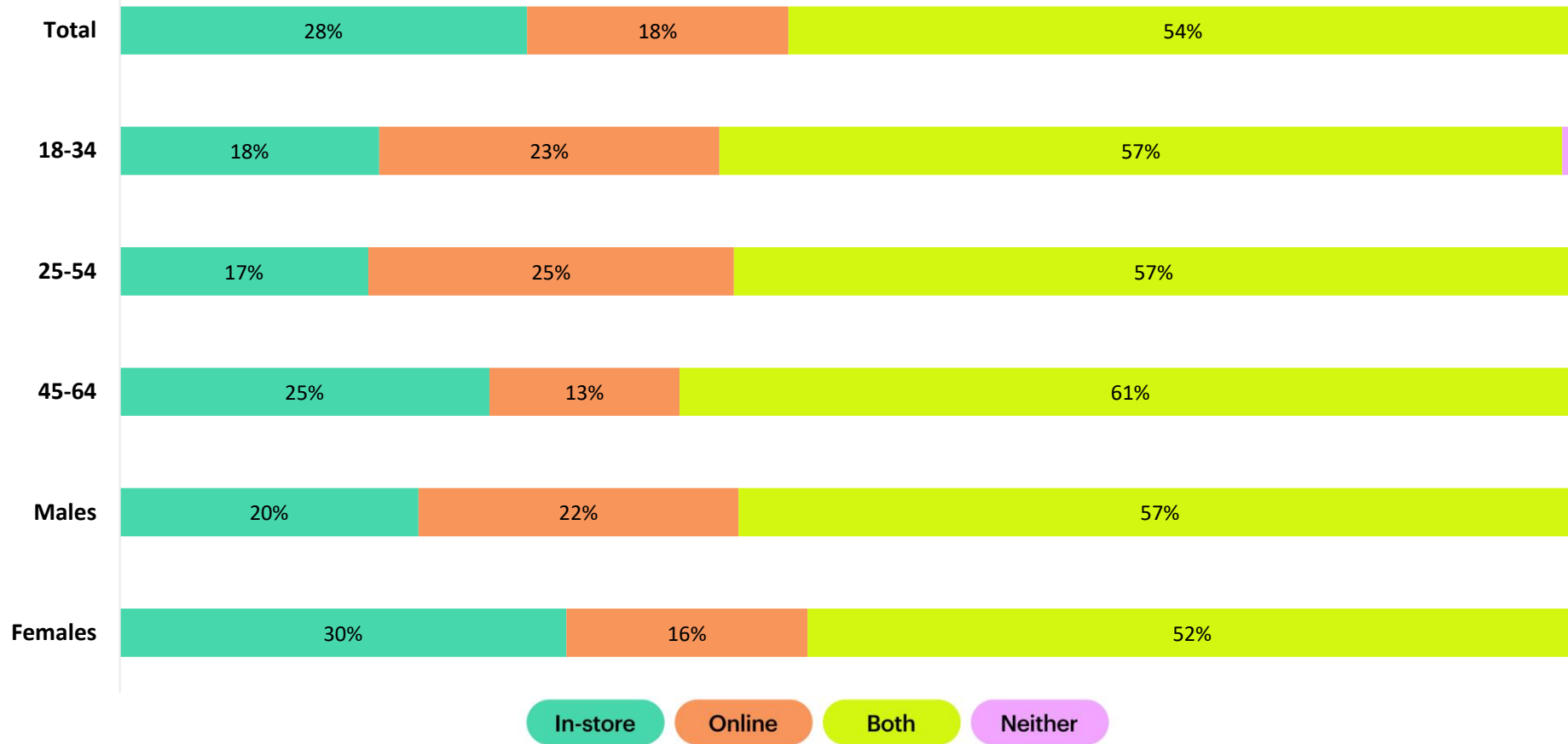


Shopping preferences.

Online vs. in-store



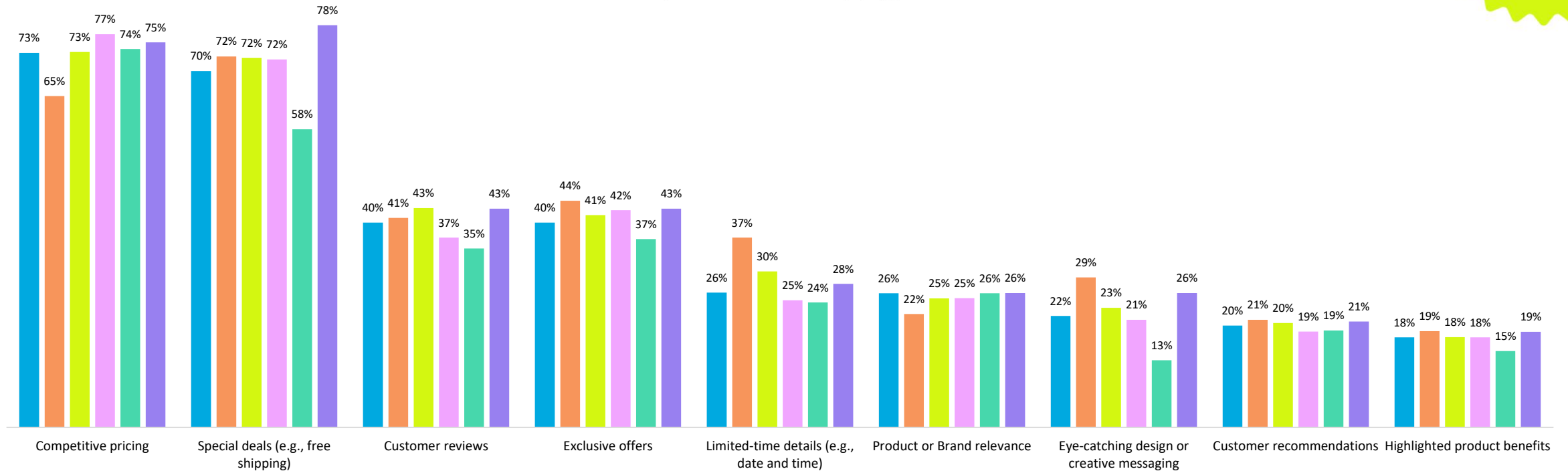
Do you prefer to shop online or in person?



The features that capture Kiwis attention in sales ads.



Which of the below features would get your attention in a sales advertisement?
(Select all that apply)

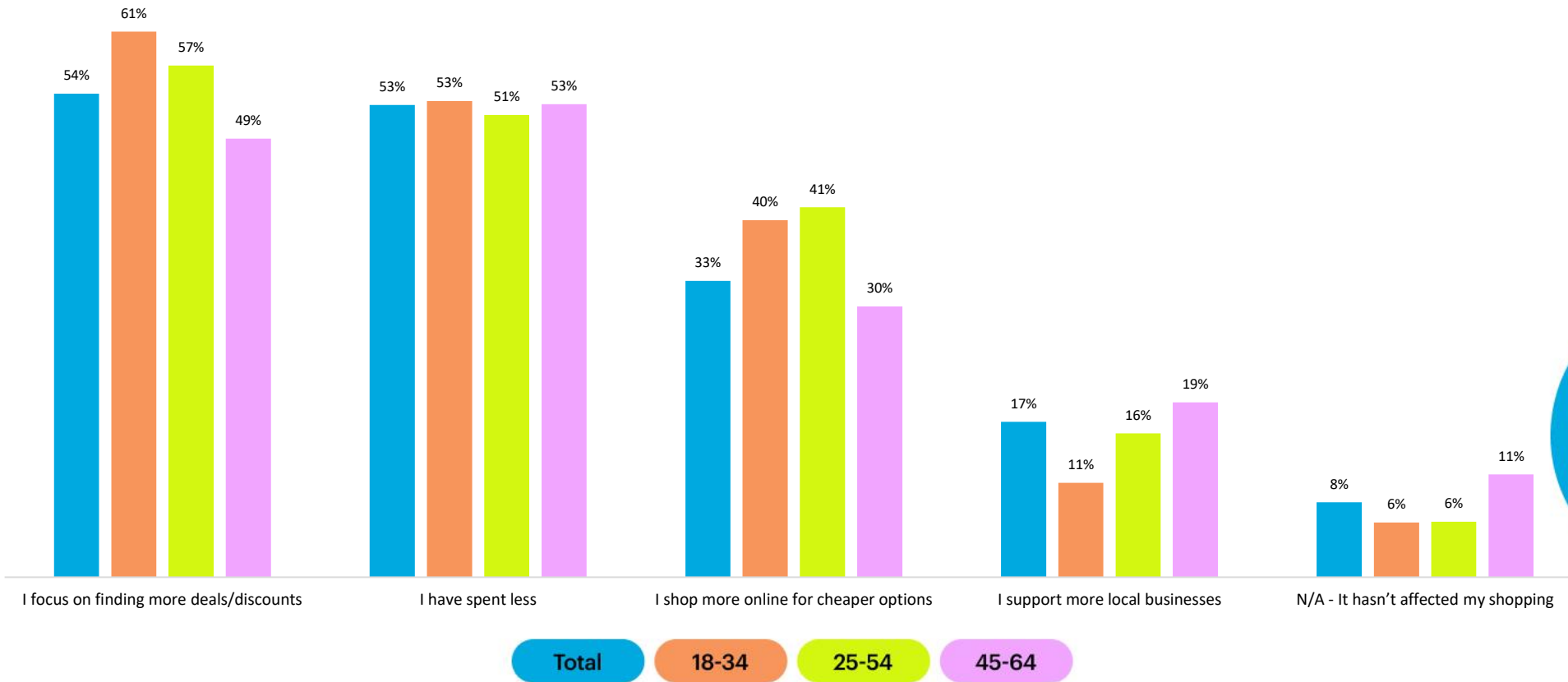


Total
18-34
25-54
45-64
Males
Females



Cost-of-living challenges are re-defining shopper behaviours.

How has the cost-of-living crisis affected your shopping over the last year? (select all that apply)



Shopper engagement during key sales periods.

Have you shopped during any of these sales periods in the past two years? (Select all that apply)

Black Friday

Total
65%

18-34
81%

25-54
76%

45-64
58%

Males
57%

Females
70%

Christmas

Total
43%

18-34
37%

25-54
45%

45-64
43%

Males
36%

Females
46%

Boxing Day

Total
42%

18-34
49%

25-54
46%

45-64
39%

Males
38%

Females
44%

Shopper engagement during key sales periods.

Have you shopped during any of these sales periods in the past two years? (Select all that apply)

Labour Weekend

Total
29%

18-34
28%

25-54
35%

45-64
28%

Males
26%

Females
31%

Easter Weekend

Total
25%

18-34
24%

25-54
29%

45-64
23%

Males
19%

Females
27%

Cyber Monday

Total
23%

18-34
32%

25-54
33%

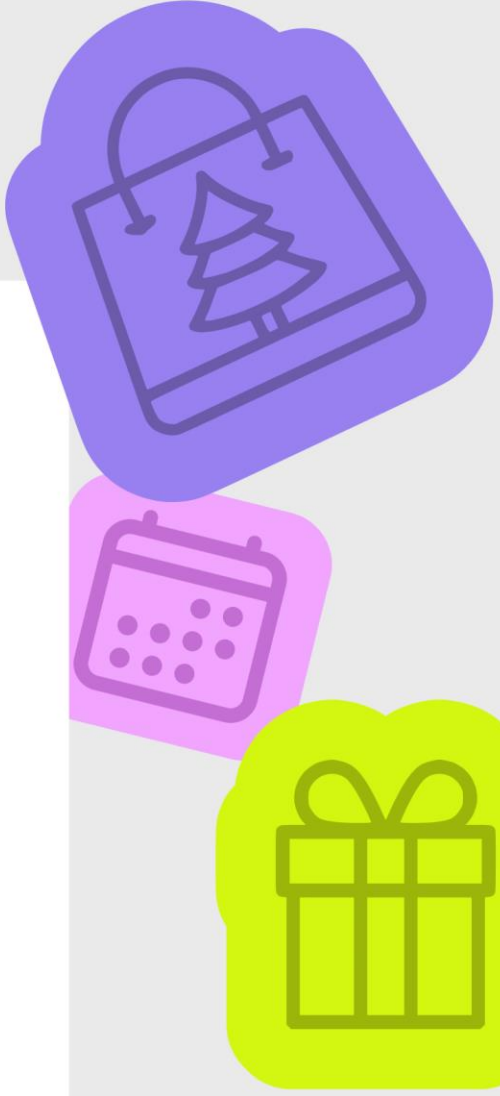
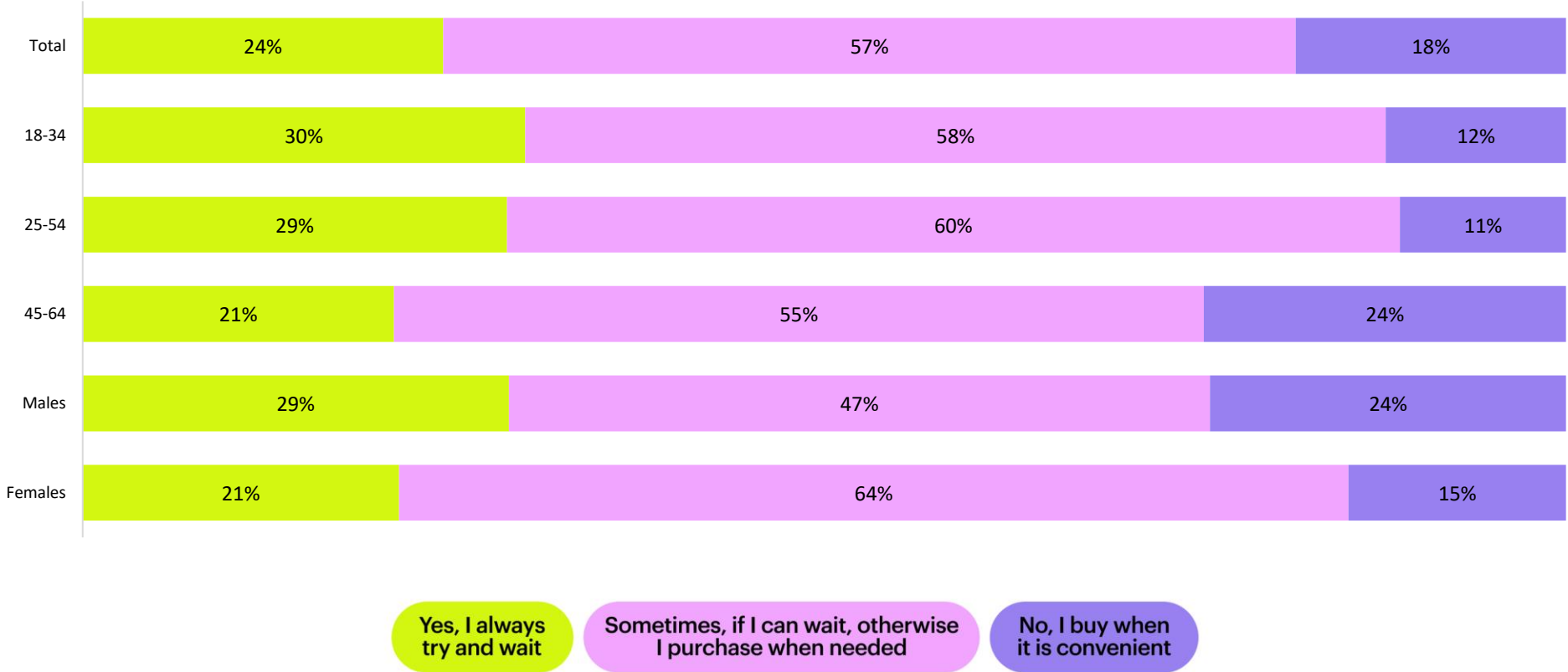
45-64
20%

Males
25%

Females
22%

Do consumers wait for sales periods to purchase?

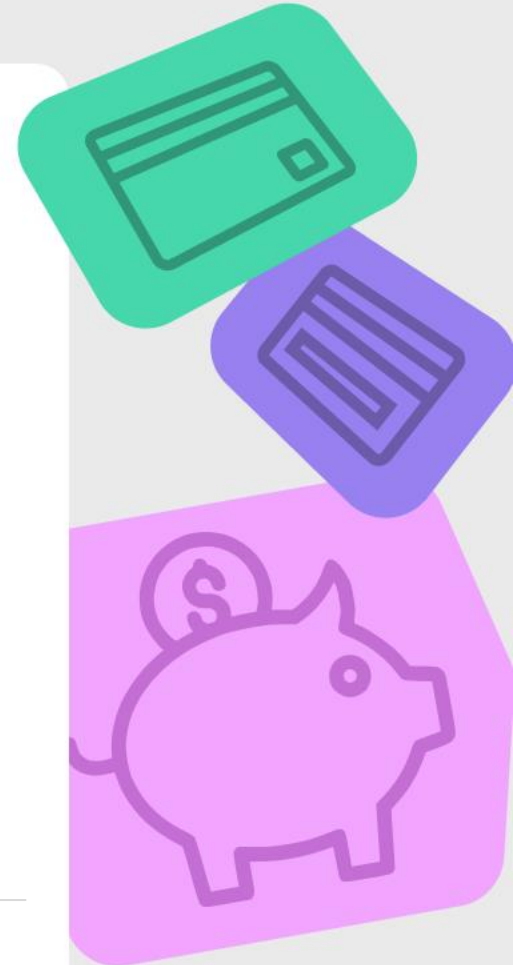
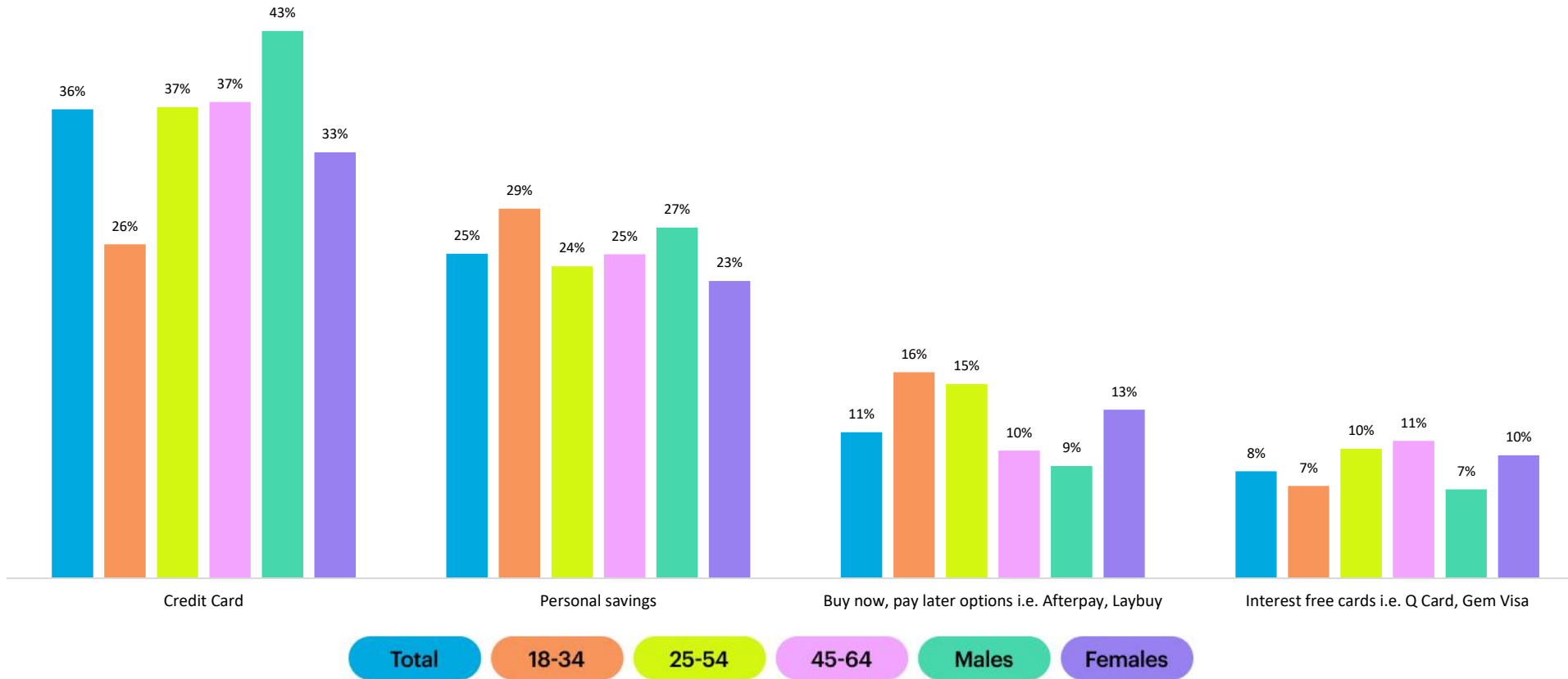
Do you usually wait for key sales periods to purchase major household items?



Source: TellMe Shopping Survey December 2024 n=821

Ways consumers pay. How Kiwis are funding major household items.

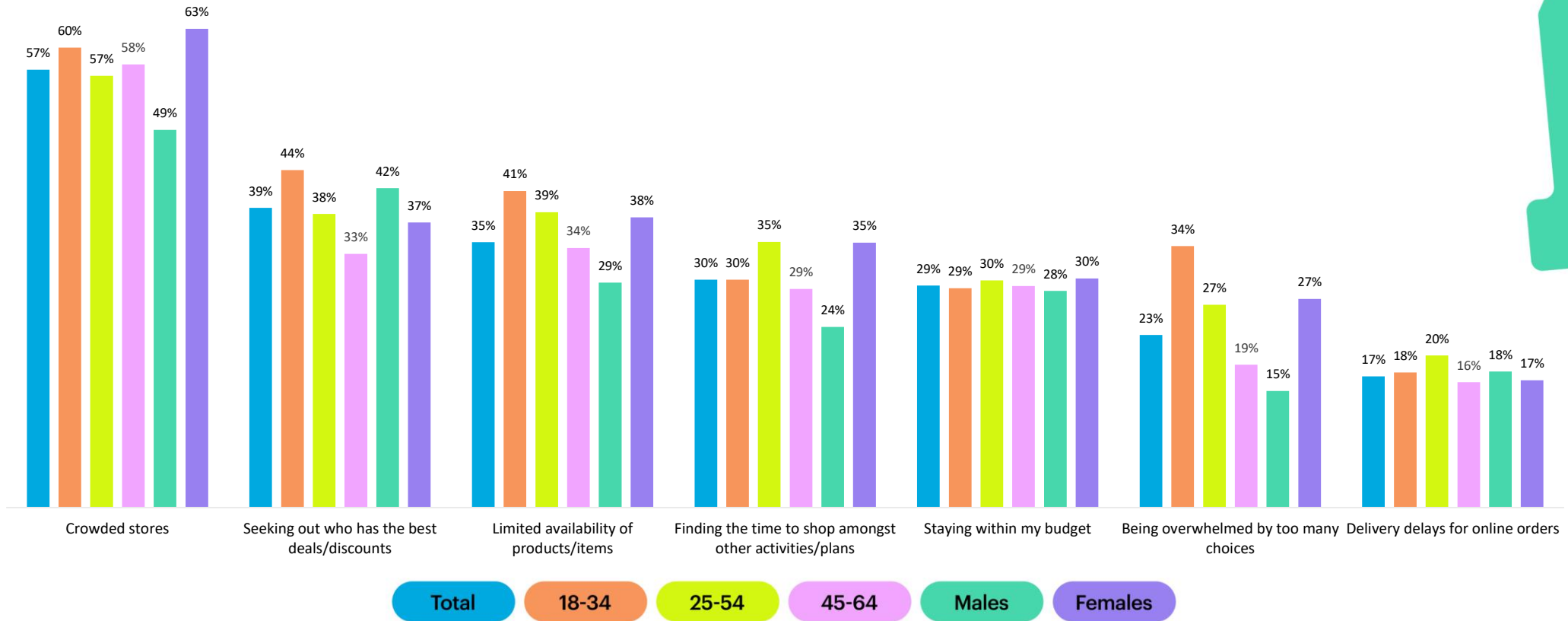
How likely are you to use the following when purchasing major household items?



Shopping barriers during key sales periods.

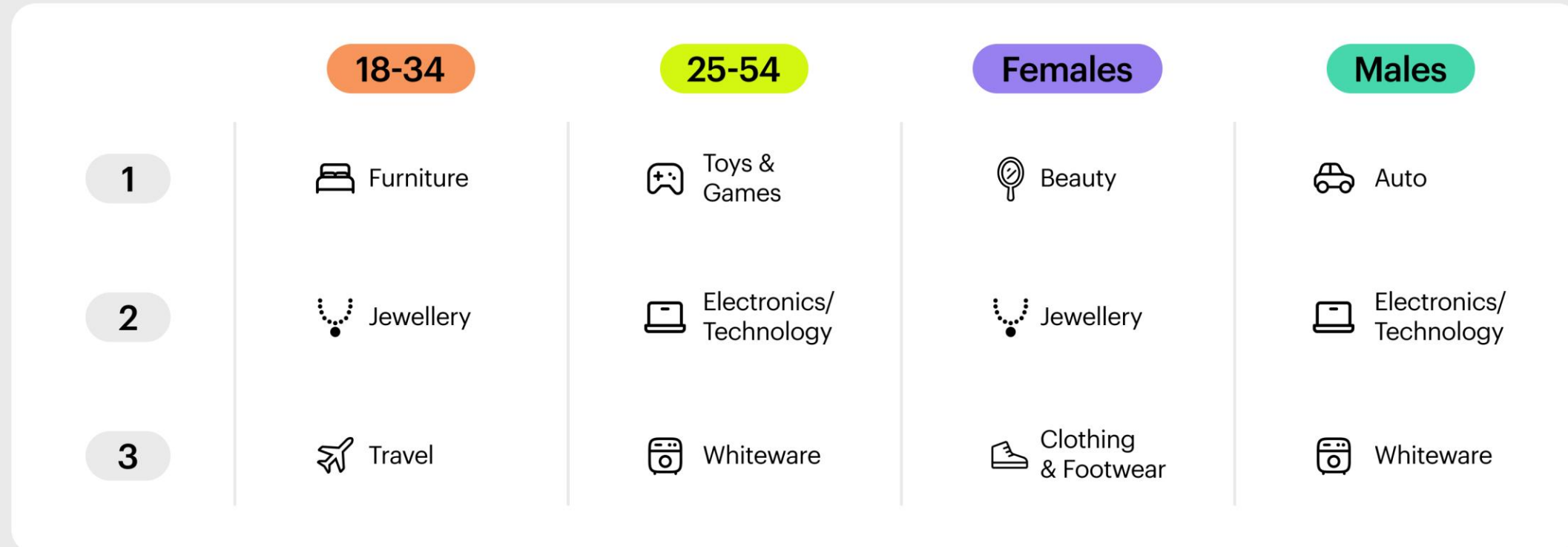
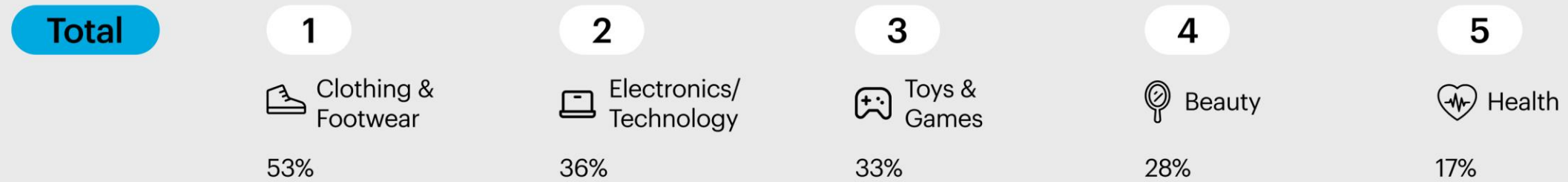


What are the main challenges, if any, do you face when shopping during sales periods like Easter, Labour Weekend, and Christmas? (Select all that apply)



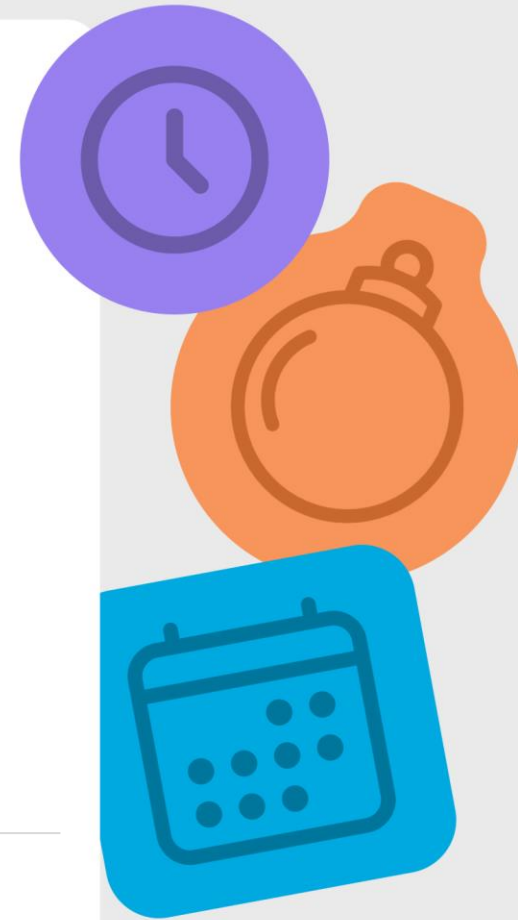
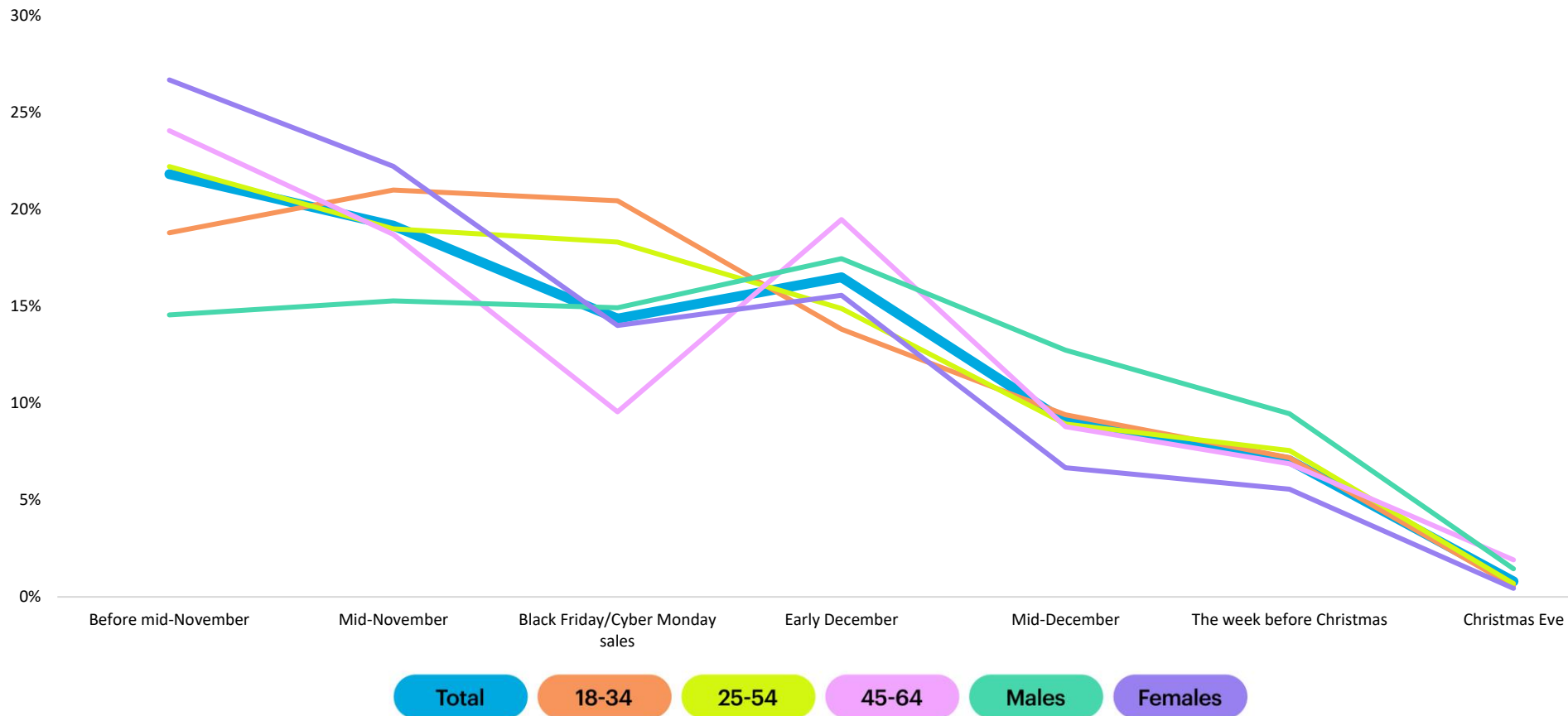
What New Zealanders are buying.

Category insights

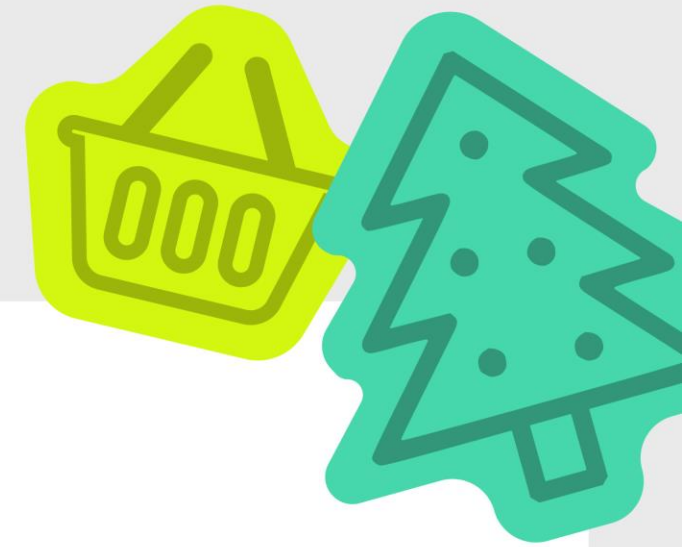


When the shopping countdown to Christmas begins.

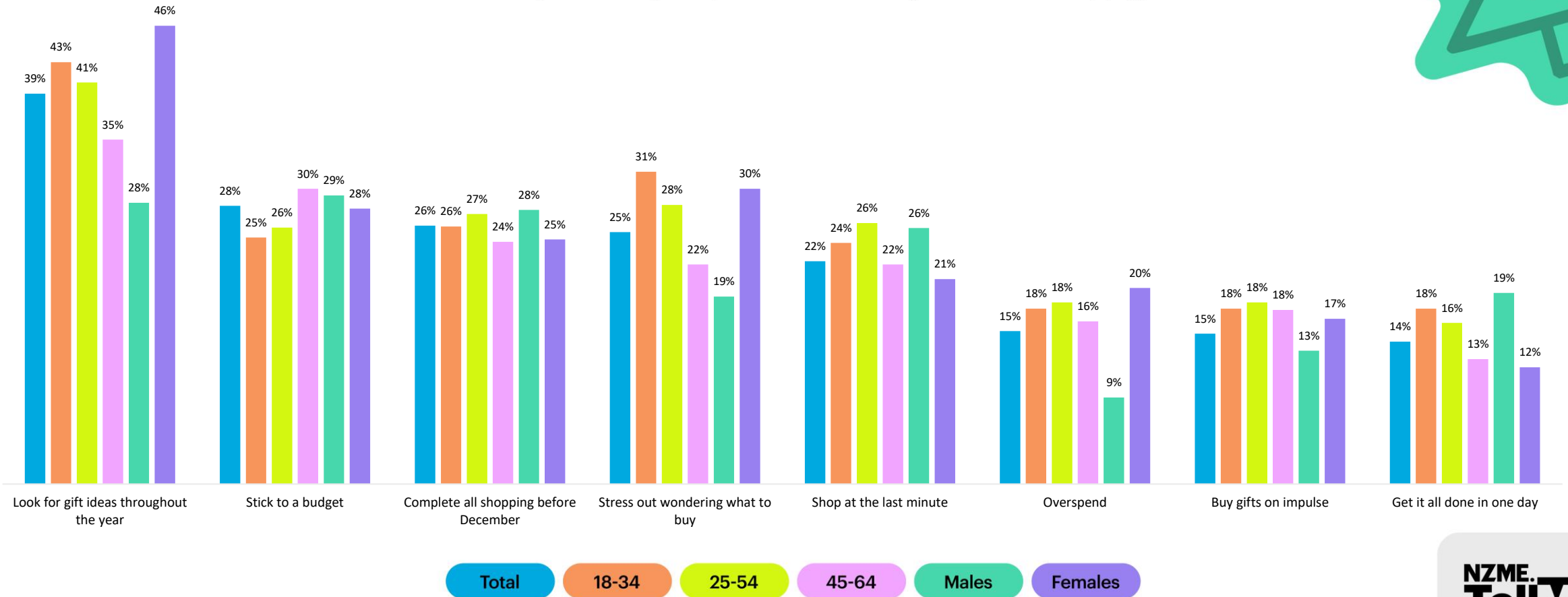
When do you usually start your Christmas shopping?



Christmas shopping behaviours and trends.



How do you usually shop for Christmas? (Select all that apply)



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