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Holiday multichannel:
United States, United Kingdom, France, Germany. Italy, Spain

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Independent research by GlobalData with support from Amazon

Snapshot

Retail was very disrupted during holiday 2020	In the six countries studied – US, UK, France, Germany, Spain and Italy – the 2020 holiday period was not a normal one for retail. Retail held up well, but significant changes in how and where people shopped resulted in uneven growth rates across all channels.
Exceptional circumstances drove exceptional behaviors	Holiday trading took place against an exceptional backdrop. In the UK, France and Germany, non-essential stores were closed for part of the period. Italy and Spain had regional lockdowns which closed some shops. And in all countries, health concerns deterred some consumers from in-person shopping.
Countries where retail remained open saw lower online growth	Apart from some localized restrictions, physical retail in the US remained fully open during the holiday. This is one of the reasons why online* growth was lower. The US reflected a more, but not completely, normalized trading environment. Online growth in Spain, which was more open than some other countries, was modestly lower than average.
The pandemic inflated online … holiday 2020 is not a new normal	Online was inflated by the exceptional circumstances. Looking at consumer preferences for shopping, lockdowns and health concerns boosted the channel by between 2 and 12 percentage points depending on the country. The UK, which had the most severe lockdown, saw the biggest boost to the online channel.
Multichannel was generally strengthened during the holiday**	While online grew, services linking stores and online – such as click and collect and store shipping– grew faster. Browsing stores before buying online were softer, but despite this the proportion of multichannel sales increased in all countries apart from the UK.
Stores played a key role in protecting sales, margins, and servicing demand	Without physical stores, it is unlikely that most retailers would have been able to manage demand. The fastest growth in most countries came from multichannel retailers that could leverage store assets to help them grow. Some retailers introduced new multichannel services to support consumer demand.

* Online refers to a transaction that is made online – i.e., payment for the product is made online regardless of the other channels used during the shopping journey.
** Multichannel refers to the use of more than one channel during a single purchase. To be a multichannel purchase, the consumer must make use of more than one channel during a given shopping journey.

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Key findings

Focus of the report

- This report looks at retail sales over the holiday period, which is defined as the calendar months of November and December. It explores the growth of both the online and physical channels and examines the connections between the two as consumers increasingly use both on their shopping journey.

- **Like most of 2020, the holiday was an unusual period where trading patterns departed from established norms**. Some of this was caused by the lockdown of non-essential stores, especially in Europe. Some was the result of health concerns among consumers which drove different shopping behaviors.

Multichannel increased in importance

- In many discussions of the holiday period, and indeed of trading in 2020, there is a tendency to focus on the growth of online and the expansion of the online sales channel. This shift, and its permanence, is something that we address in this report. However, arguably **the most important narrative isn't one about online versus physical, it is about how channels are working together to drive sales and support the profitable growth of retailers**.

- On this front, **multichannel – where consumers ordering online use stores as part of their shopping journey – rather than any single channel, was the standout winner of the holiday** period.

- In all countries, bar the UK, multichannel sales grew faster than any single channel. This means that **the proportion of online sales that were multichannel, in that physical stores were used as part of the shopping journey, increased compared to last year**.

- In France and Germany, the increase in multichannel was relatively small but the fact it increased at all is remarkable given that many non-essential shops were force to close for part of the trading period. **In France, almost 21% of online sales involved stores as part of the shopping journey. In Germany that number was just over 31%.**

- In Italy and Spain, the increase was larger. In Italy 28% of online sales involved stores during the holiday period, this is up from 24% in the same period in 2019. In Spain 28% of online sales were supported by stores, up from 26%. **The fact that retail was more open in these countries helped to support multichannel**.

- In the US, where retail was mostly open, the proportion of online sales relying on a store increased by the most, up by over 5 percentage points to just shy of 37%. **The US provides a more normalized example of how multichannel can flourish and accelerate when stores are permitted to operate normally**.

- **The UK was the outlier because of severe pandemic restrictions on store openings which are not representative of normal trading patterns**. Here, the proportion of online sales connected to stores dropped to just over 32% from 37% in the year before. Even so, it is significant that even with many stores closed for in-person shopping, such a high proportion of online sales still rely on physical shops.

- **In many ways, multichannel helped to save the holidays for traditional retailers**. The expansion of multichannel services and the investment made in multichannel systems and capabilities earlier in 2020 came into their own. They allowed retailers both to meet customer preferences and to use store assets to service demand.

- **Notably, many retailers across all countries are intending to continue multichannel investments** and are making many of the new services they introduced in response to the pandemic permanent.

Store pickup of online orders is driving growth

- **Across all countries, the proportion of online orders collected from a physical store increased over the prior year**. This area of multichannel showed consistent growth in 2020 as a whole and it did not slow down during the holidays.

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Key findings

- Some of the growth is down to retailers innovating and adding new pickup services, such as curbside collection, as a means of increasing convenience for customers and improving the efficiency of their fulfilment operations. Such services have proved very popular with consumers.

- The US provides the best example of the potential of store collection, because of the open nature of retail during the holidays. Here, **the proportion of online sales collected from a store rose from 18% in holiday 2019 to 27% in holiday 2020**. Target alone reported that its curbside collection service, know as Drive Up, grew by over 500% in the fourth quarter.

Browsing stores before buying online was weaker

- One of the other ways in which stores can drive online sales is when shoppers use stores to browse, research or get inspiration before making a transaction online. This connection between the two channels was growing pre-pandemic.

- **Over the holidays, this area of multichannel weakened in all countries**. The decline was particularly sharp in the UK where fewer than 10% of online sales were influenced by in-store browsing or research compared to around 17% in the year before. Given that the only stores consumers could browse were essential ones, including the grocery players which sell a lot of non-food, this steep drop-off is unsurprising.

- **It is reasonable to assume that as stores reopen and as consumers become less concerned about in-person shopping this area of multichannel will strengthen**. As it does, the growth of multichannel will be boosted in both absolute and proportionate terms.

Lockdown countries saw online transactions accelerate

- **In countries where physical non-essential stores were prevented from opening for at least part of the holiday period, online sales accelerated**, and penetration of the channel increased. Before the pandemic, there was expansion in online sales and penetration, but the enforced closures boosted this well beyond the average levels of growth.

- **The UK is the most extreme example of this as the government mandated closure of non-essential stores shut retail for 93% of the trading period**. As a result, online sales increased by almost 78% over 2019.

- **Online sales accelerated in both France and Germany, but the lockdowns in both countries proved to be less disruptive to trade** than the UK's as they covered only part of the holiday period. In the case of Germany, the lockdown came later in December which allowed consumers to complete most of their holiday shopping in advance of restrictions. In France, the lockdown was confined to November so did not affect trade in December.

- In the US, although most stores remained open, large numbers of consumers cut back on buying from stores due to health concerns – especially over the traditional Black Friday period.

Higher online penetration is not a new normal

- Where stores were forced to close, consumers had fewer choices of where to shop for products. More were pushed to purchase online. Given this, **it is important not to automatically regard the high penetrations as a new normal for retail trading**.

- By looking at consumer preferences and assessing the degree of 'enforced' switching between channels used for purchase, the research makes an estimation of what online channel penetration would have been if the pandemic restrictions were not in place. This allows the 'natural' growth of online to be separated from that growth created by exceptional circumstances.

- In the UK, where behavior was disrupted the most, online penetration increased by almost 12 percentage points because of pandemic-related factors. **This means that rather than the 31.3% online penetration the UK recorded over the holiday period, without the pandemic it would have attained only a 19.7% penetration rate**.

Key findings

- In France, online penetration was pushed up by 4 percentage points, and in Germany it was just over 3 percentage points. In Spain, online was inflated by almost 2 percentage points, and in Italy the same number is just over 2 percentage points. This is the degree to which the lockdowns artificially inflated online.

The US was disrupted, but trading was more normalized

- Across most of the US, restrictions over the holiday period were few and far between. Most shops traded normally, albeit with some requirements for social distancing and capacity constraints. However, the pandemic still exerted an influence on shopper behavior with some consumers restricting their visits to stores because of health concerns.

- **The lack of a lockdown in the US is one of the reasons why online growth was slower than in the other countries studied**. It is also why the pandemic only inflated online penetration by 2.1 percentage points – most of this due to consumers being reluctant to shop in-person rather than because they couldn't.

- **In a sense, the US paints a picture of retail under a more normalized (although not completely normal) trading environment rather than the artificial conditions created by lockdowns**.

Looking ahead

- There is no doubt that 2020 was a very disrupted year for retail, and that 2021 will continue to be disrupted because of the ongoing impacts of the pandemic. However, **most retailers adapted extremely well to the challenges and quickly innovated to meet customer needs** and to make the most of both their physical and online assets.

- As vaccinations are rolled out and restrictions eased, trading patterns will start to shift again. **It is unlikely that things will return to exactly where they were before the pandemic hit, but neither will every change seen during the past year linger**.
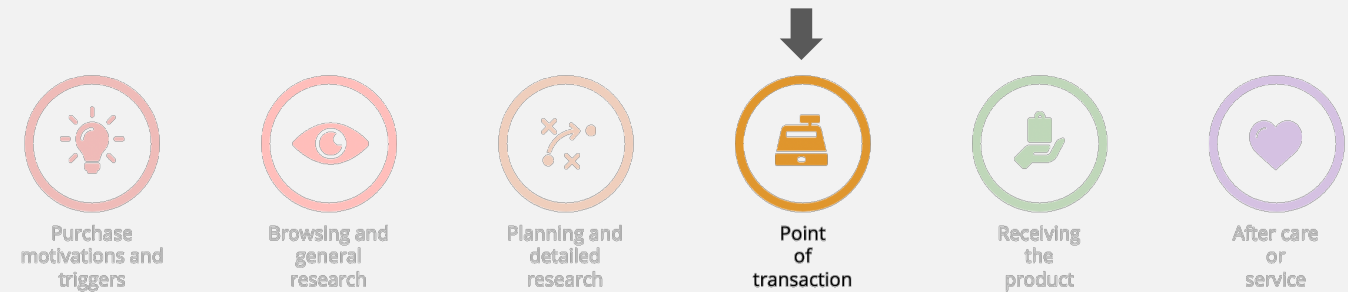
- **Ultimately, the changes that will stick are those, like multichannel, that add value to the consumer**. This is one of the reasons why apocalyptic predictions about the future of retail, especially with regards to its presence in physical places and spaces, will fail to materialize.

- Rather than destroying physical stores, **if the pandemic has done anything it has shown retailers the value those locations have in supporting a wider, and seamless, multichannel ecosystem**.
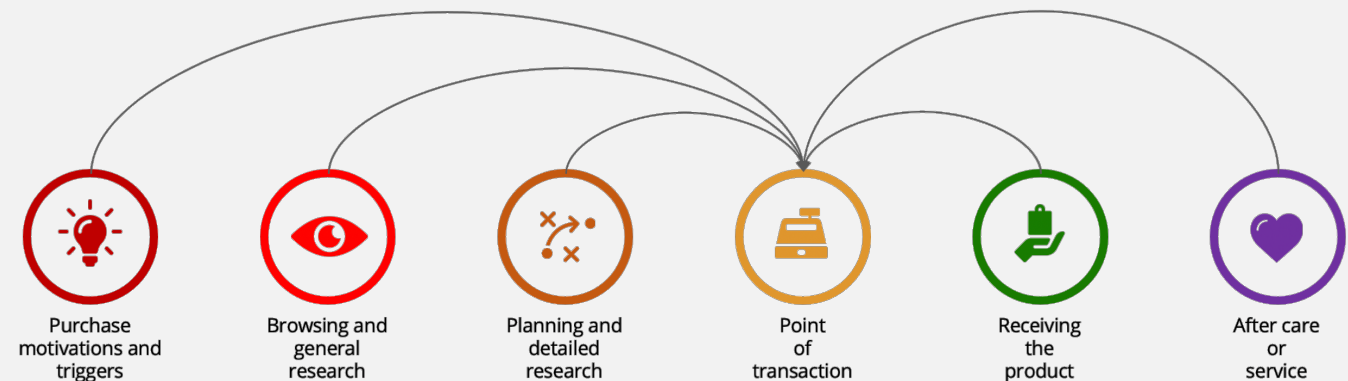
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Summary
The shopping journey

- The pandemic has created a lot of discussion about the rapid growth of the online channel. Numbers showing the increased penetration of digital sales and e-commerce growth have made for frequent talking points.

- Looking at the channel through which a sale has been made has the benefit of simplicity: it is relatively easy to measure, and it is straightforward to understand. However, the main drawback is that it presents a superficial picture of how consumers shop and how retailers serve customers.

- The principle here is the point of transaction does not exist in isolation. A significant number of transactions are part of a wider shopping journey that involves multiple stages. Across each of these steps the consumer may use a variety of different channels to meet their needs. There are an enormous number of journey permutations, making it complex to map consumer behaviors.

- However, developing an understanding of the shopping journey and the interplay of channels is critical. Not least because it allows retailers to properly understand the assets, they need to deploy in order to meet the needs of customers.

- With overly-simplistic narratives such as "more online sales equals fewer stores" now abounding, the pandemic induced trends have heightened the need for this more nuanced understanding.

- What's interesting is that a great deal of the online channel growth coming from traditional retailers is closely connected to physical shops in some way. As the next slide shows, in a sense, the pandemic is increasing the links between online and physical channels and demonstrating that retail is, in fact, one big market rather than separate channels.

The traditional way of measuring sales focuses only on the point of transaction; however, this is only one part of the shopping journey and all other parts are ignored

Purchase motivations and triggers | Browsing and general research | Planning and detailed research | Point of transaction | Receiving the product | After care or service

The more accurate way to understand sales is to look at how all elements of the shopping journey influence and support the point of transaction

Purchase motivations and triggers | Browsing and general research | Planning and detailed research | Point of transaction | Receiving the product | After care or service

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Multichannel

Multichannel penetration and growth for 2019 and 2020
Country summary

Country	Proportion of online sales that were multichannel, 2019	Proportion of online sales that were multichannel, 2020	Change 2019 to 2020
USA	31.21%	36.53%	+5.32 % pt
UK	37.39%	32.48%	-4.91 % pt
France	20.22%	20.90%	+0.68 % pt
Germany	30.26%	31.08%	+0.82 % pt
Spain	26.49%	28.12%	+1.63 % pt
Italy	24.02%	27.99%	+3.97 % pt

Data show the percentage of online sales that are multichannel – that is, a store was used in some way as part of the shopping journey or fulfilment process; numbers are shown for 2019 and 2020

Source: GlobalData analysis and market data

Despite disruption, multichannel grew in most countries

Multichannel is where the transaction is made online, but stores are used for some part of the purchase journey like pickup/collection of the purchased product or browsing for inspiration.

In all countries, bar the UK, the proportion of multichannel sales increased over last year. In France and Germany, multichannel growth was partly suppressed by the closure of non-essential stores for some of the period. Spain and Italy were more open, which supported multichannel.

The US shows the highest growth in multichannel, largely thanks to the retail economy remaining open over the holidays and consumers being freer to exercise their shopping preferences.

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Growth rates and lockdowns

Growth of online sales and lockdown days
Country summary

Country	Total days of lockdown in the holiday period	Growth of online sales in holiday 2020 versus holiday 2019
USA	0 days (0% of period)	+34.71%
UK	57 days (93% of period)	+77.55%
France	28 days (46% of period)	+36.14%
Germany	16 days (26% of period)	+43.16%
Spain	12 days* (20% of period)	+36.04%
Italy	19 days* (31% of period)	+41.99%

Data show the total growth of holiday sales through the online channel in 2020 versus 2019 plus the number of days that non-essential shops were closed due to lockdown during the holiday period (November and December)
* Denotes regional lockdown policy
Source: GlobalData analysis and market data

Countries with lockdowns saw higher online growth

In all countries, online sales grew during the holiday period. Growth was highest in countries where non-essential retail was shut down – something that forced more people to shop online.

The United Kingdom saw the most rapid growth, largely thanks to non-essential retailers being closed for most of the holiday period.

Both Germany and France had lockdowns, however, these proved less disruptive to trade as, in the case of Germany, they came very late in the holiday season. For France, the lockdown was in November, which left consumers free to shop stores in December.

Online growth in Italy was affected by lockdowns, but the country is more embryonic in online penetration, which flatters growth rates.

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Online penetration

Online penetration rates and pandemic impact for 2020
Country summary

Country	Online sales penetration in holiday 2020	Estimated online sales penetration without pandemic impact
USA	**20.61%**	**18.53%**
UK	**31.26%**	**19.72%**
France	**17.15%**	**13.07%**
Germany	**17.61%**	**14.29%**
Spain	**9.13%**	**7.45%**
Italy	**8.90%**	**6.51%**

Data show the proportion of total sales transacted through the online channel in holiday 2020, plus an estimate of what penetration would have been without the impact of the pandemic

Source: GlobalData analysis and market data

Holiday 2020 is not a new normal, it is an exception

Online holiday sales penetration was elevated in all countries. However, online was inflated by the exceptional circumstances of the pandemic – namely the closure of non-essential retail and health concerns about in-person shopping.

The table opposite shows the actual penetration, and an estimation of what penetration would have been without pandemic factors.

In the US, where most retail stores were open over the holidays, the impact was smaller than in countries where there was a lockdown. Spanish retail was also more open, relative to other countries, and the impact was smaller compared to other European countries.
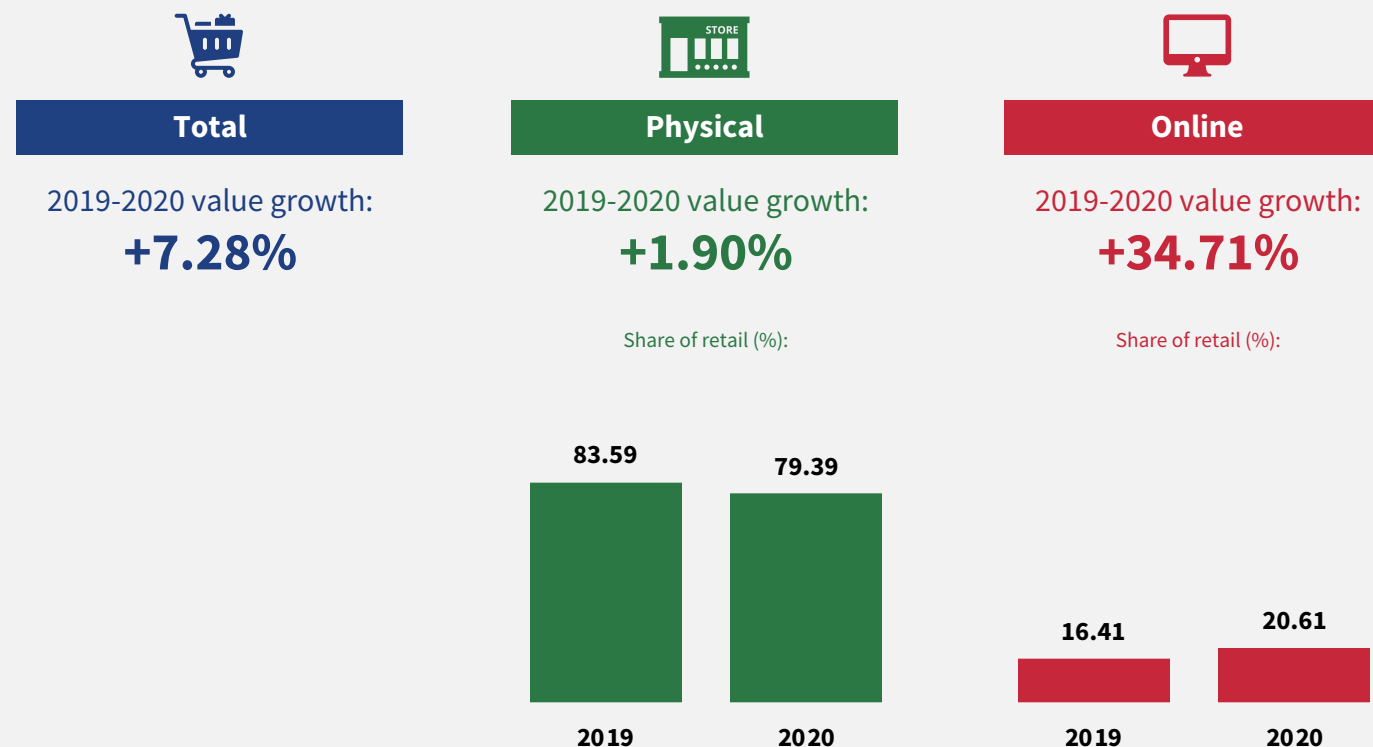
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United States

Detailed data and insights for the United States

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Holiday overview

Overall holiday sales dynamics

Growth, and share of retail 2019 and 2020

Total

2019-2020 value growth:

+7.28%

Physical

2019-2020 value growth:

+1.90%

Share of retail (%):

83.59   79.39

2019   **2020**

Online

2019-2020 value growth:

+34.71%

Share of retail (%):

16.41   20.61

2019   **2020**

Online expanded strongly during the holiday, but physical remained in growth

Holiday sales in the United States were robust – growing by over 7% during November and December. Despite the strong growth of online, **stores still accounted for just under 80% of all sales**.

Data refer only to the holiday period which is November and December of each year. Penetration is total online sales in each year divided by total retail spending in that same year

Source: GlobalData analysis and market data

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Holiday food and non-food

Holiday food and non-food dynamics
Growth, and share of retail 2019 and 2020

	Food		Non-food	
Total	2019-2020 value growth: **+9.77%**	Share of retail: **2019: 100.00%** **2020: 100.00%**	2019-2020 value growth: **+6.24%**	Share of retail: **2019: 100.00%** **2020: 100.00%**
Physical	2019-2020 value growth: **+7.61%**	Share of retail: **2019: 96.75%** **2020: 94.84%**	2019-2020 value growth: **-1.07%**	Share of retail: **2019: 78.07%** **2020: 75.70%**
Online	2019-2020 value growth: **+74.32%**	Share of retail: **2019: 3.25%** **2020: 5.16%**	2019-2020 value growth: **+32.25%**	Share of retail: **2019: 21.93%** **2020: 27.30%**

Growth for both stores and online was driven mostly by the food sector

Food sales grew strongly, both online and in stores, as consumers diverted money from eating out into buying groceries to eat at home. However, despite the strong growth, **only 5% of food sales were made online during the holidays**.

Non-food retail sales through physical stores shrank slightly, **but shops still accounted for three-quarters of all non-food sales**.

Data refer only to the holiday period which is November and December of each year. Penetration is total online sales in each year divided by total retail spending in that same year

Source: GlobalData analysis and market data

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Holiday multichannel

Holiday multichannel dynamics
Proportion of online orders linked to stores

		% of sales in 2019	% of sales in 2020	Growth in value:
	Customer collects from store	**18.10**	**27.23**	**+102.63%**
	Retailer ships from store to customer	**5.42**	**7.25**	**+80.19%**
	Shopper uses store as part of purchase	**16.62**	**14.29**	**+15.82%**
	Deduplicated total	**32.21**	**36.53**	**+52.81%**

Retail has become more connected and multichannel is more important

The proportion of online sales linked to stores, either by fulfilment or because consumers used stores as part of the initial purchase journey, increased compared to 2019. **In holiday 2020, 36.53% of online sales were linked to physical stores.**
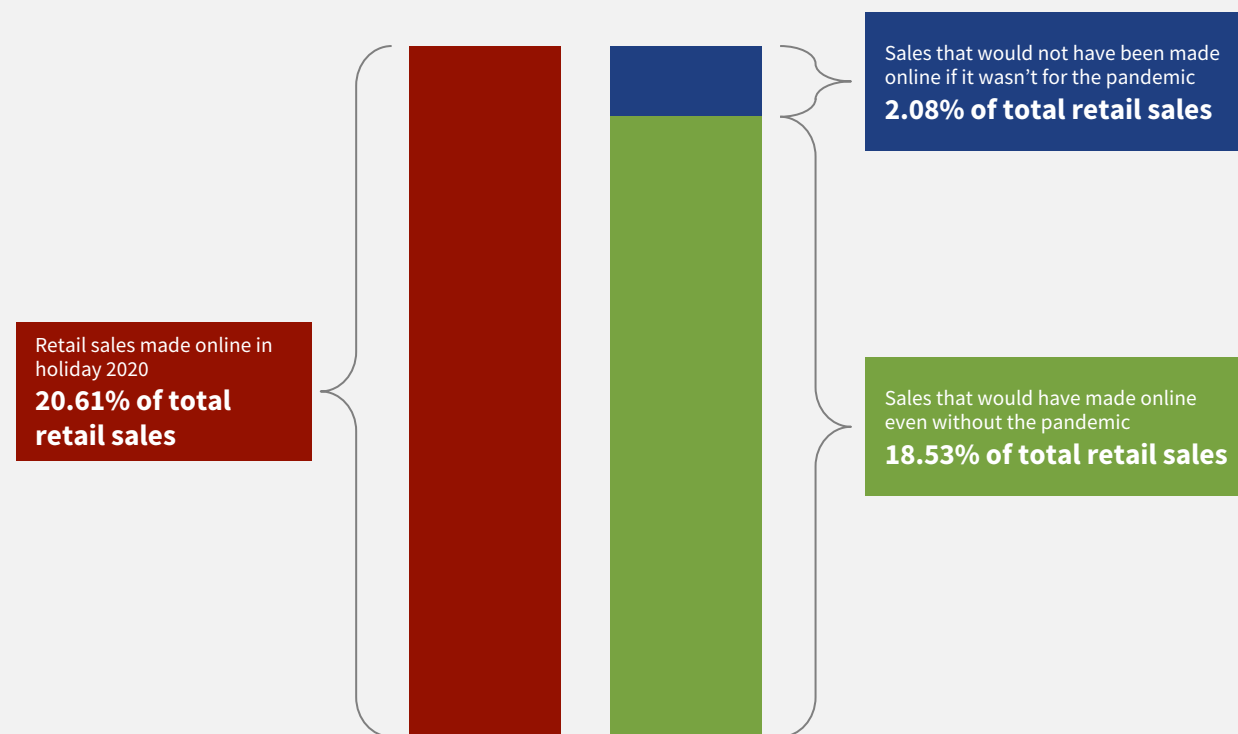
In-store collection of orders played a very big role in driving the links between online and physical shops higher – especially as consumers became concerned about the reliability of deliveries near to Christmas.

Numbers show the proportion of online sales connected to stores in various ways. The deduplicated total takes out overlap between the ways – e.g., an order where the customer browsed in store first, ordered online and then had the order shipped from a store. Note that 'shoppers uses store as part of the purchase process' includes visiting stores for inspiration, browsing or research plus after-purchase services (which are a small element).
Source: GlobalData analysis and market data

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Pandemic impact

How the pandemic inflated online sales
Proportion of online sales that were made because of the pandemic

Sales that would not have been made online if it wasn't for the pandemic
2.08% of total retail sales

Retail sales made online in holiday 2020
20.61% of total retail sales

Sales that would have made online even without the pandemic
18.53% of total retail sales

Online sales were inflated because of the pandemic

Although 20.6% of retail sales were made online over the holidays, this number has been driven higher because of consumer health concerns about visiting physical shops. From the consumer research, without these concerns only 18.5% of sales would have been made online.

In other words, **the online channel was not necessarily the first or natural preference for some shoppers this holiday season**. It is reasonable to assume that this spend will migrate back to physical stores when the pandemic wanes.

Data show an estimate of the proportion of online sales over the holiday period that were made because the pandemic restricted shopping habits, either due to lockdowns or health concerns about in-person shopping

Source: GlobalData analysis and market data using GlobalData consumer panel research
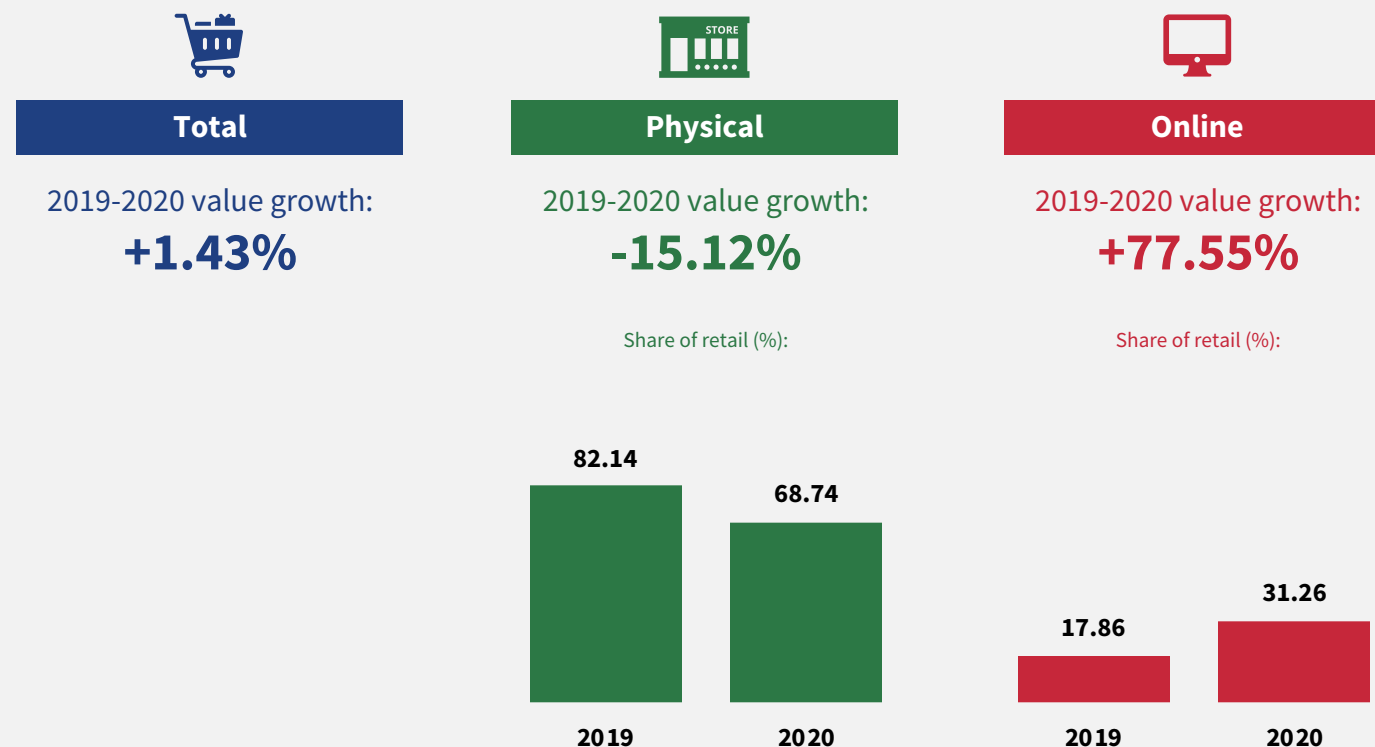
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United Kingdom

Detailed data and insights for the United Kingdom

Holiday overview

Overall holiday sales dynamics
Growth, and share of retail 2019 and 2020

Total

2019-2020 value growth:
+1.43%

Physical

2019-2020 value growth:
-15.12%

Share of retail (%):

Online

2019-2020 value growth:
+77.55%

Share of retail (%):

Physical:
- 82.14 — 2019
- 68.74 — 2020

Online:
- 17.86 — 2019
- 31.26 — 2020

Store sales collapsed as online retail sales soared

The spending dynamics in the United Kingdom were very heavily impacted by the lockdown which closed most non-essential shops from November 5th onward. This forced a lot of consumers to shop online and led to phenomenal growth of the channel.

Store sales did not collapse completely as essential stores remained open, including the grocery players which sell a wide selection of non-food products.

Data refer only to the holiday period which is November and December of each year. Penetration is total online sales in each year divided by total retail spending in that same year

Source: GlobalData analysis and market data

GlobalData.

Holiday food and non-food

Holiday food and non-food dynamics
Growth, and share of retail 2019 and 2020

	Food		Non-food	
Total	2019-2020 value growth: **+9.25%**	Share of retail: **2019: 100.00%** **2020: 100.00%**	2019-2020 value growth: **-3.77%**	Share of retail: **2019: 100.00%** **2020: 100.00%**
Physical	2019-2020 value growth: **+2.85%**	Share of retail: **2019: 92.59%** **2020: 87.16%**	2019-2020 value growth: **-29.84%**	Share of retail: **2019: 75.19%** **2020: 54.82%**
Online	2019-2020 value growth: **89.25%**	Share of retail: **2019: 7.41%** **2020: 12.84%**	2019-2020 value growth: **75.22%**	Share of retail: **2019: 24.81%** **2020: 45.18%**

Pressure on stores came mostly from non-food

Given that most shuttered non-essential stores sell non-food, it is not surprising that sales fell by almost 30%. **Online took its highest ever share of non-food, although this was largely down to the exceptional circumstance of the lockdown.**

Food sold at physical stores remained in growth as footfall to grocery retailers was strong.

Data refer only to the holiday period which is November and December of each year. Penetration is total online sales in each year divided by total retail spending in that same year

Source: GlobalData analysis and market data

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Holiday multichannel

Holiday multichannel dynamics
Proportion of online orders linked to stores

		% of sales in 2019	% of sales in 2020	Growth in value:
🚗	**Customer collects from store**	**12.34**	**15.26**	**+119.56%**
🚚	**Retailer ships from store to customer**	**14.22**	**16.25**	**+102.89%**
💡	**Shopper uses store as part of purchase**	**17.31**	**9.54**	**-2.15%**
⅄	**Deduplicated total**	**37.39**	**32.48**	**-4.91%**

Multichannel connections strengthened in delivery and shipping

Although non-essential stores were shut for in-person shopping, many remained open for the collection of online orders. Equally, the major supermarkets also expanded their collection options. **This resulted in many more online sales being collected from a physical shop**. The percentage of online orders shipped from stores also jumped, largely thanks to grocery delivery from supermarkets.
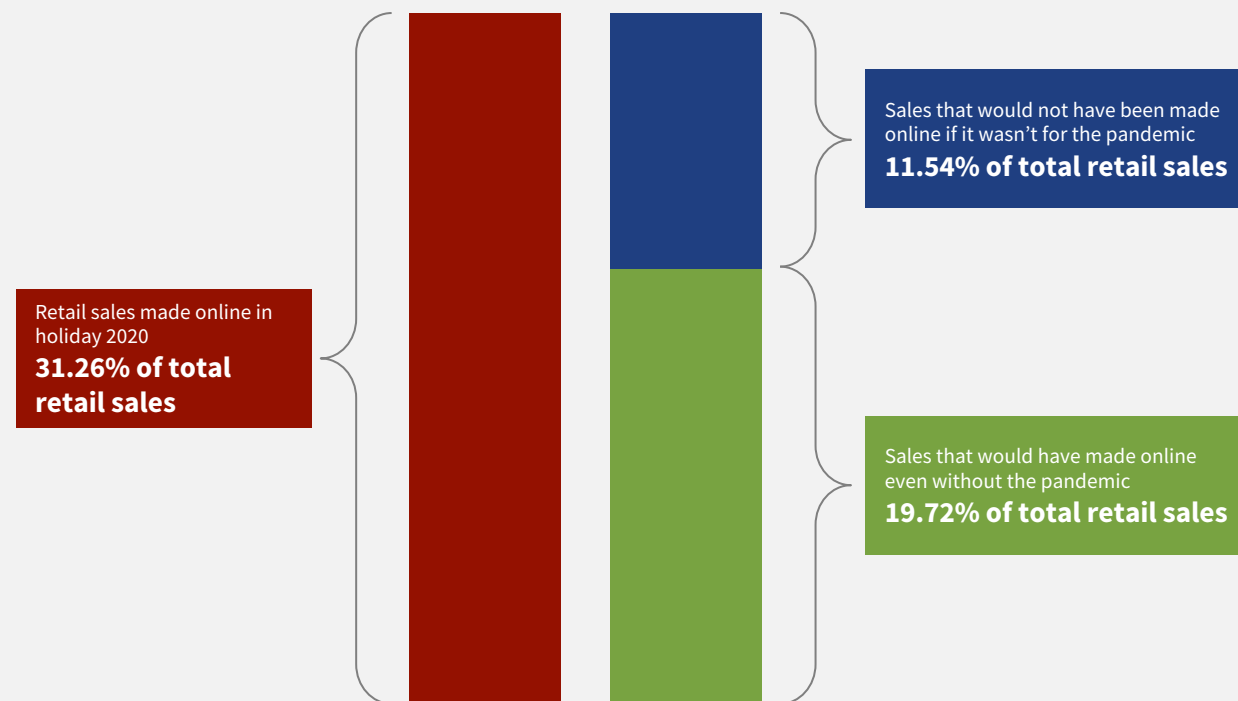
The overall proportion of online sales classified as multichannel fell because consumers were not able to use non-essential shops as part of the initial purchase journey.

Numbers show the proportion of online sales connected to stores in various ways. The deduplicated total takes out overlap between the ways – e.g., an order where the customer browsed in store first, ordered online and then had the order shipped from a store. Note that 'shoppers uses store as part of the purchase process' includes visiting stores for inspiration, browsing or research plus after-purchase services (which are a small element).
Source: GlobalData analysis and market data

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Pandemic impact

How the pandemic inflated online sales
Proportion of online sales that were made because of the pandemic

Sales that would not have been made online if it wasn't for the pandemic
11.54% of total retail sales

Retail sales made online in holiday 2020
31.26% of total retail sales

Sales that would have made online even without the pandemic
19.72% of total retail sales

A big chunk of online sales were made from necessity rather than choice

The UK lockdown was an exceptional event that had a dramatic impact on holiday retail. The growth and penetration of online does not represent a new normal.

Indeed, consumer data shows that **without the lockdown, online penetration would have been just shy of 20%.**

Data show an estimate of the proportion of online sales over the holiday period that were made because the pandemic restricted shopping habits, either due to lockdowns or health concerns about in-person shopping

Source: GlobalData analysis and market data using GlobalData consumer panel research
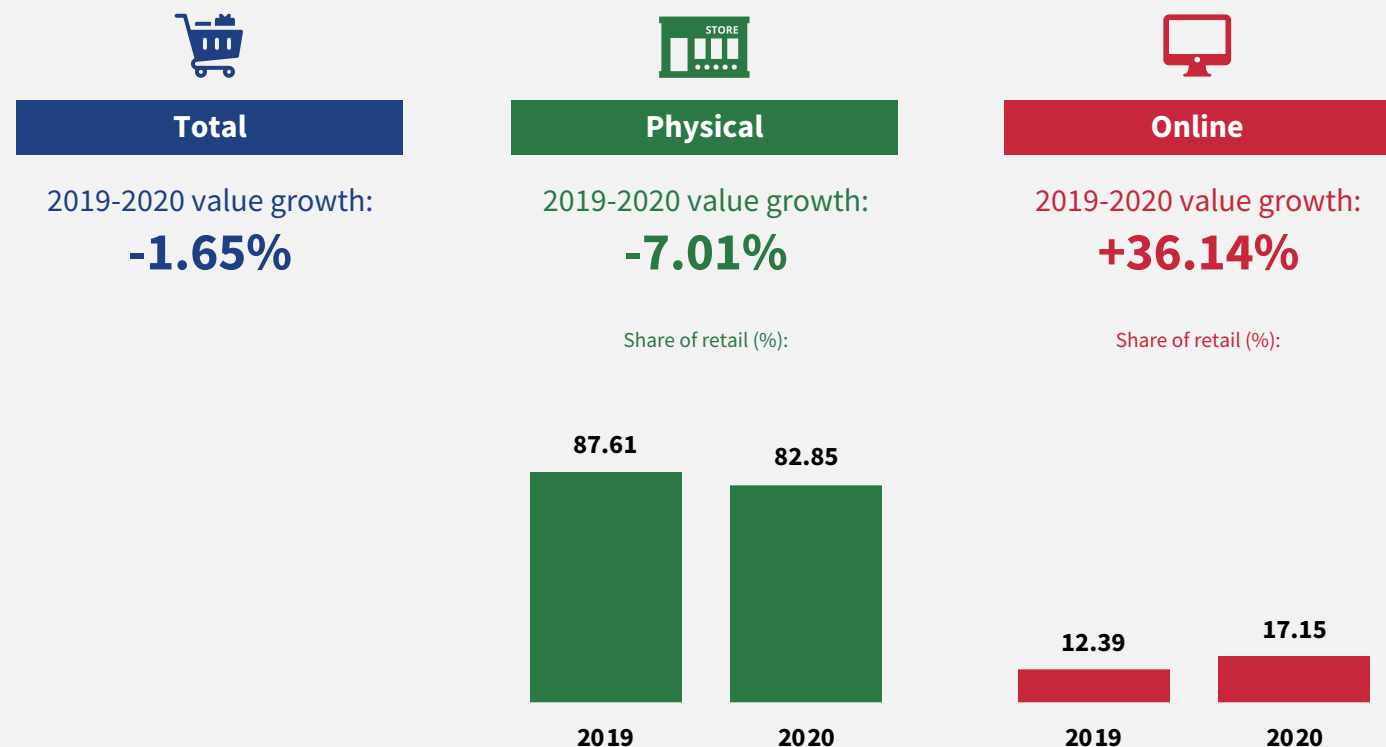
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France

Detailed data and insights for France

Holiday overview

Overall holiday sales dynamics
Growth, and share of retail 2019 and 2020

Total

2019-2020 value growth:

-1.65%

Physical

2019-2020 value growth:

-7.01%

Share of retail (%):

87.61   82.85

2019   2020

Online

2019-2020 value growth:

+36.14%

Share of retail (%):

12.39   17.15

2019   2020

Sales were sluggish in France, mostly thanks to lockdown

France's lockdown closed most non-essential stores until late in November, something that sent retail sales tumbling. Momentum picked up in December but not by enough to offset the weakness in November.

Online grew strongly, but still **only accounted for 17% of all retail sales over the holiday period**.

Data refer only to the holiday period which is November and December of each year. Penetration is total online sales in each year divided by total retail spending in that same year

Source: GlobalData analysis and market data

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France
Holiday food and non-food

Holiday food and non-food dynamics
Growth, and share of retail 2019 and 2020

	Food		Non-food	
Total	2019-2020 value growth: **+6.29%**	Share of retail: **2019: 100.00%** **2020: 100.00%**	2019-2020 value growth: **-8.99%**	Share of retail: **2019: 100.00%** **2020: 100.00%**
Physical	2019-2020 value growth: **+5.05%**	Share of retail: **2019: 94.64%** **2020: 93.54%**	2019-2020 value growth: **-19.98%**	Share of retail: **2019: 81.11%** **2020: 71.32%**
Online	2019-2020 value growth: **+28.19%**	Share of retail: **2019: 5.36%** **2020: 6.46%**	2019-2020 value growth: **+38.22%**	Share of retail: **2019: 18.89%** **2020: 28.68%**

Non-food suffered thanks to the lockdown

Non-food sales fell by 9% over the holidays, largely thanks to the lockdown of non-essential stores and increased cautiousness about spending by French consumers.

Online share of the non-food market advanced by around 10 percentage points, with most of the gains coming during the November lockdown period.

Data refer only to the holiday period which is November and December of each year. Penetration is total online sales in each year divided by total retail spending in that same year

Source: GlobalData analysis and market data

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France
Holiday multichannel

Holiday multichannel dynamics
Proportion of online orders linked to stores

	Customer collects from store	% of sales in 2019 6.14	% of sales in 2020 8.62	Growth in value: +91.12%
	Retailer ships from store to customer	% of sales in 2019 3.85	% of sales in 2020 4.70	Growth in value: +66.19%
	Shopper uses store as part of purchase	% of sales in 2019 12.63	% of sales in 2020 11.74	Growth in value: +26.54%
	Deduplicated total	% of sales in 2019 20.22	% of sales in 2020 20.90	Growth in value: +40.70%

French retail became slightly more multichannel over the holiday

Largely thanks to increased collection of online orders from stores and an increase in shipping from stores, **more online sales were multichannel than was the case in 2019**.
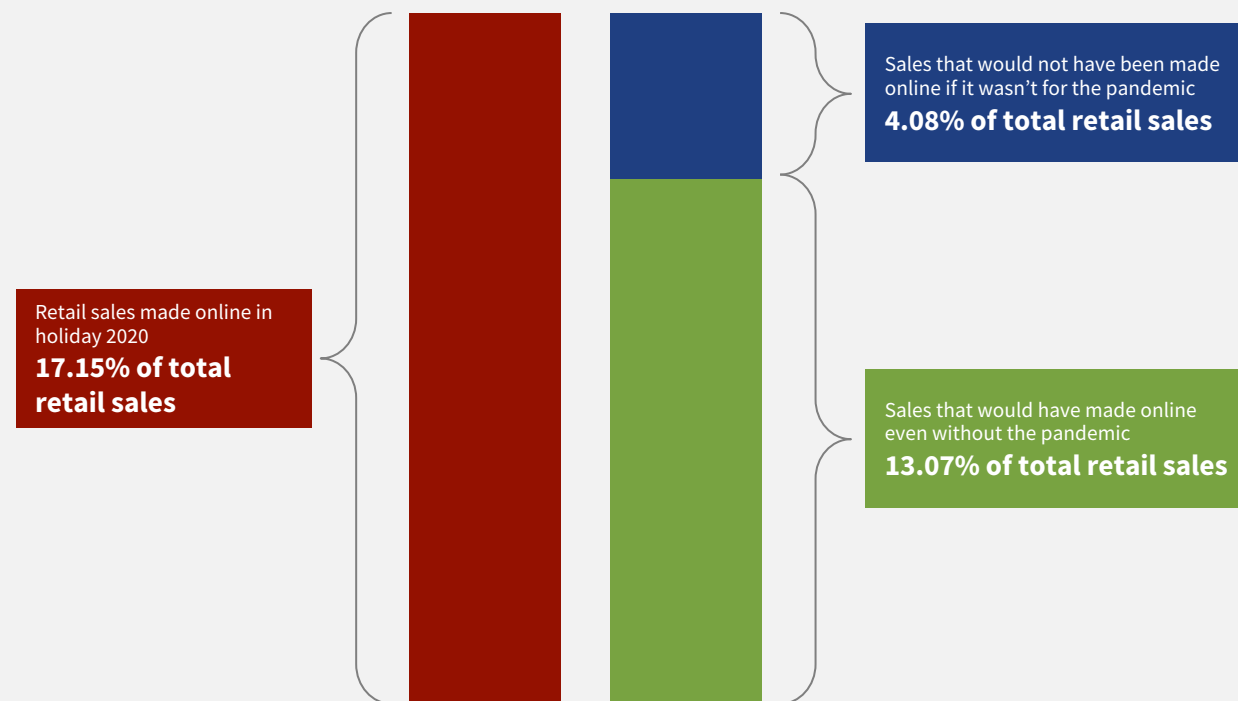
While the proportion of online sales that involved a store in terms of influencing the transaction declined slightly, the value went up due to the increased level of online activity.

Numbers show the proportion of online sales connected to stores in various ways. The deduplicated total takes out overlap between the ways – e.g., an order where the customer browsed in store first, ordered online and then had the order shipped from a store. Note that 'shoppers uses store as part of the purchase process' includes visiting stores for inspiration, browsing or research plus after-purchase services (which are a small element).
Source: GlobalData analysis and market data

GlobalData.

France
Pandemic impact

How the pandemic inflated online sales
Proportion of online sales that were made because of the pandemic

Retail sales made online in holiday 2020
17.15% of total retail sales

Sales that would not have been made online if it wasn't for the pandemic
4.08% of total retail sales

Sales that would have made online even without the pandemic
13.07% of total retail sales

Pandemic restrictions artificially inflated the online share of retail

Without the pandemic restrictions, around 13% of retail sales would have been made online. Many French consumers were forced to use online in November as non-essential physical shops were closed. Some reluctance to shop in-person because of health concerns persisted into December driving more shoppers online from necessity.

Data show an estimate of the proportion of online sales over the holiday period that were made because the pandemic restricted shopping habits, either due to lockdowns or health concerns about in-person shopping

Source: GlobalData analysis and market data using GlobalData consumer panel research
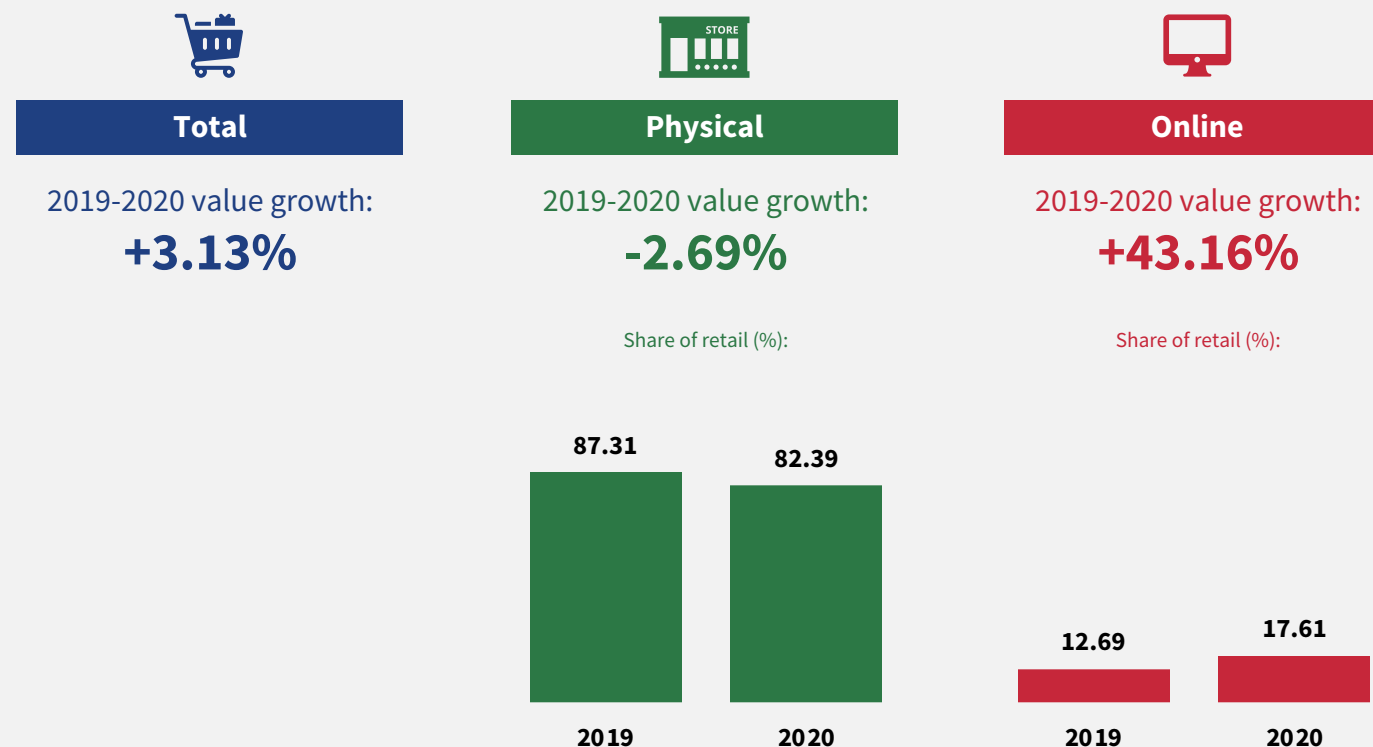
GlobalData.

Germany

Detailed data and insights for Germany

GlobalData.

Holiday overview

Overall holiday sales dynamics
Growth, and share of retail 2019 and 2020

Total
2019-2020 value growth:
+3.13%

Physical
2019-2020 value growth:
-2.69%

Share of retail (%):

87.31 | 82.39
2019 | 2020

Online
2019-2020 value growth:
+43.16%

Share of retail (%):

12.69 | 17.61
2019 | 2020

German retail held up well, although physical sales fell

Stores in Germany remained open for most of the holiday period, albeit with some restrictions. A lockdown of non-essential stores was put in place on December 16th. This affected the tail end of Christmas shopping and put a modest dint in the sales through physical stores.

Online grew strongly thanks to the late lockdown and because of some health concerns about in-person shopping.

Data refer only to the holiday period which is November and December of each year. Penetration is total online sales in each year divided by total retail spending in that same year

Source: GlobalData analysis and market data

GlobalData.

Holiday food and non-food

Holiday food and non-food dynamics
Growth, and share of retail 2019 and 2020

	Food		Non-food	
Total	2019-2020 value growth: **+5.28%**	Share of retail: **2019: 100.00%** **2020: 100.00%**	2019-2020 value growth: **+1.47%**	Share of retail: **2019: 100.00%** **2020: 100.00%**
Physical	2019-2020 value growth: **+4.92%**	Share of retail: **2019: 98.13%** **2020: 97.30%**	2019-2020 value growth: **-8.40%**	Share of retail: **2019: 80.64%** **2020: 72.80%**
Online	2019-2020 value growth: **+52.86%**	Share of retail: **2019: 1.87%** **2020: 2.70%**	2019-2020 value growth: **+42.58%**	Share of retail: **2019: 19.36%** **2020: 27.20%**

Food helped to boost online growth, but penetration remains low

Online food grew strongly in Germany over the holidays. However, even with this boost, **online penetration for food remained below 3%.**

Non-food sales made in stores dipped by around 8%, although this is lower than other countries where lockdown lasted longer over the holiday period.

Data refer only to the holiday period which is November and December of each year. Penetration is total online sales in each year divided by total retail spending in that same year

Source: GlobalData analysis and market data

GlobalData.

Holiday multichannel

Holiday multichannel dynamics
Proportion of online orders linked to stores

		% of sales in 2019	% of sales in 2020	Growth in value:
🚗	**Customer collects from store**	**9.22**	**11.53**	**+79.02%**
🚚	**Retailer ships from store to customer**	**6.21**	**6.44**	**+48.46%**
💡	**Shopper uses store as part of purchase**	**17.32**	**16.42**	**+35.72%**
	Deduplicated total	**30.26**	**31.08**	**+47.07%**

German retail became more multichannel over the holiday

Both in store collection and store-shipping of online orders helped to boost the proportion of online sales connected to a store. **Just over 31% of all online sales in Germany were linked to a store in some way during the holiday period**.

Numbers show the proportion of online sales connected to stores in various ways. The deduplicated total takes out overlap between the ways – e.g., an order where the customer browsed in store first, ordered online and then had the order shipped from a store. Note that 'shoppers uses store as part of the purchase process' includes visiting stores for inspiration, browsing or research plus after-purchase services (which are a small element).
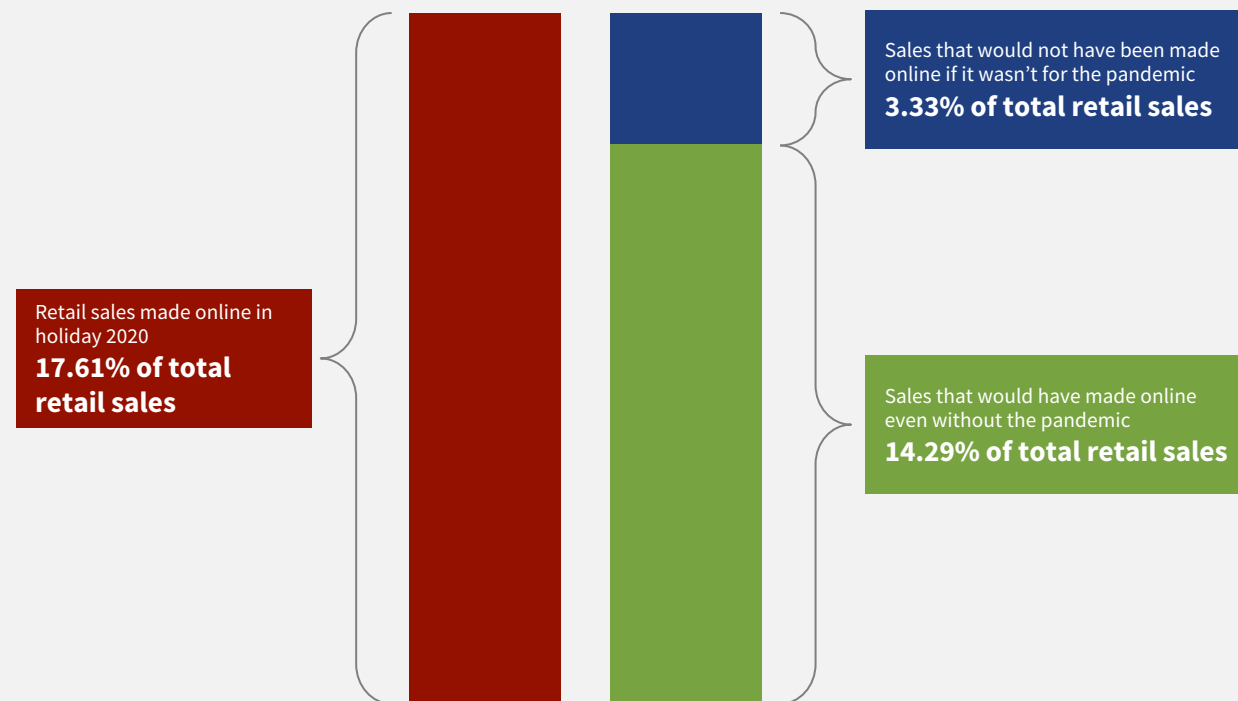
Source: GlobalData analysis and market data

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Pandemic impact

How the pandemic inflated online sales

Proportion of online sales that were made because of the pandemic

Sales that would not have been made online if it wasn't for the pandemic
3.33% of total retail sales

Retail sales made online in holiday 2020
17.61% of total retail sales

Sales that would have made online even without the pandemic
14.29% of total retail sales

Online penetration would have been lower without the pandemic

The shutdown of non-essential retail in mid December forced some consumers to buy online. Health concerns also meant that some German shoppers were more reluctant to buy in person. **Without these exceptional circumstances, online would have accounted for just over 14% of total sales**.

Data show an estimate of the proportion of online sales over the holiday period that were made because the pandemic restricted shopping habits, either due to lockdowns or health concerns about in-person shopping

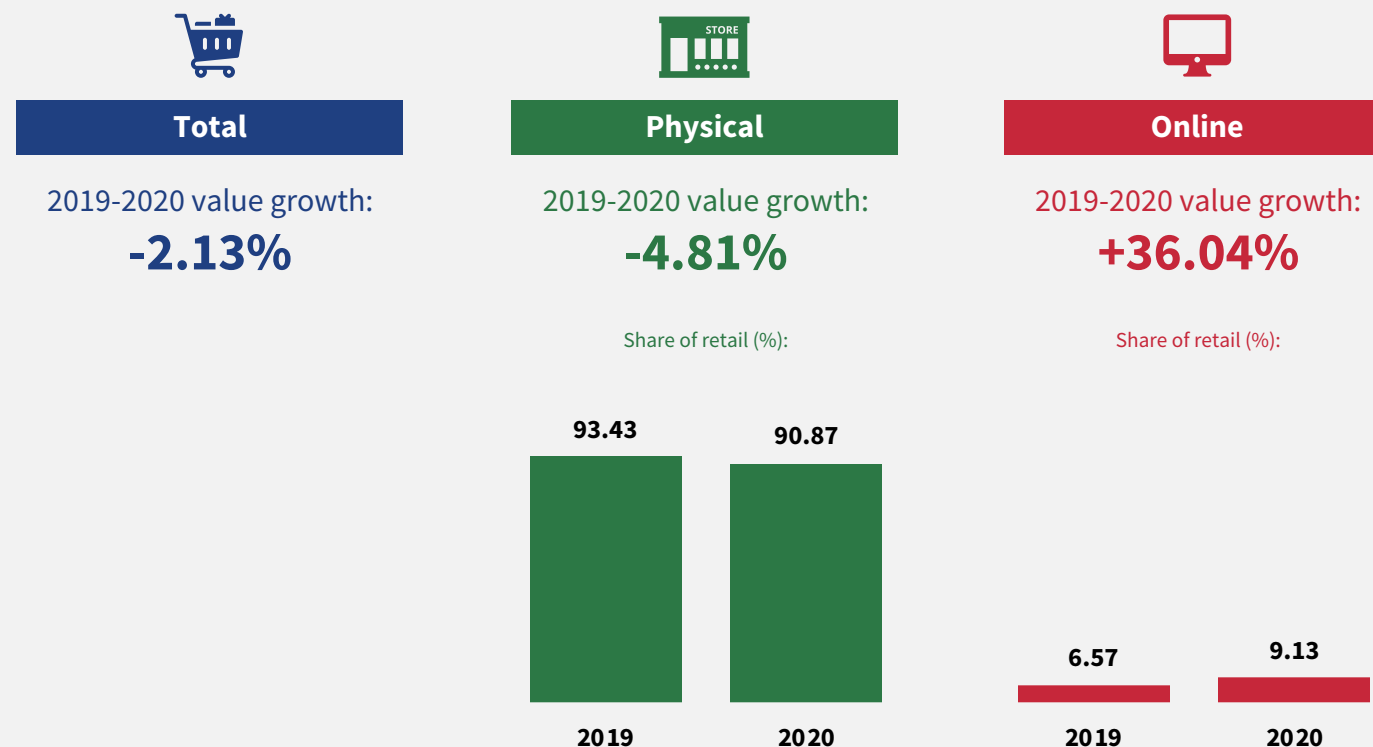Source: GlobalData analysis and market data using GlobalData consumer panel research

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Spain

Detailed data and insights for Spain

GlobalData.

Spain
Holiday overview

Overall holiday sales dynamics
Growth, and share of retail 2019 and 2020

Total

2019-2020 value growth:
-2.13%

Physical

2019-2020 value growth:
-4.81%

Share of retail (%):

93.43   90.87

2019   2020

Online

2019-2020 value growth:
+36.04%

Share of retail (%):

6.57   9.13

2019   2020

Sales were weak in Spain, though online performed well

Despite rising consumer confidence towards the end of the year, Spanish retail sales dropped by just over 2.1% during the holiday period. Most of the deterioration came in November and was driven by some regional store opening restrictions and travel curtailments. December sales remained soft but were markedly better than November.

Online grew sharply, especially in November as more consumers stayed home. However, online growth moderated slightly in December.

Data refer only to the holiday period which is November and December of each year. Penetration is total online sales in each year divided by total retail spending in that same year

Source: GlobalData analysis and market data

GlobalData.

Holiday food and non-food

Holiday food and non-food dynamics
Growth, and share of retail 2019 and 2020

	Food		**Non-food**	
Total	2019-2020 value growth: **+3.46%**	Share of retail: **2019: 100.00%** **2020: 100.00%**	2019-2020 value growth: **-7.93%**	Share of retail: **2019: 100.00%** **2020: 100.00%**
Physical	2019-2020 value growth: **+2.22%**	Share of retail: **2019: 97.86%** **2020: 96.69%**	2019-2020 value growth: **-12.86%**	Share of retail: **2019: 88.83%** **2020: 84.07%**
Online	2019-2020 value growth: **+60.15%**	Share of retail: **2019: 2.14%** **2020: 3.31%**	2019-2020 value growth: **+31.24%**	Share of retail: **2019: 11.17%** **2020: 15.93%**

Food sales held up well, but non-food was very negative

Food sales rose by almost 3.5% over the holiday period, a solid rate of growth that was aided by higher sales in stores and especially online.

Non-food sales fell sharply, more so than in some countries that had longer lockdowns. Most of this was related to consumers cutting back to save money and a reduction in in-person shopping due to health concerns which suppressed impulse buying.

Data refer only to the holiday period which is November and December of each year. Penetration is total online sales in each year divided by total retail spending in that same year

Source: GlobalData analysis and market data

GlobalData.

Spain
Holiday multichannel

Holiday multichannel dynamics
Proportion of online orders linked to stores

		% of sales in 2019	% of sales in 2020	Growth in value:
🚗	**Customer collects from store**	**6.93**	**9.87**	**+93.75%**
🚚	**Retailer ships from store to customer**	**8.93**	**11.13**	**+69.55%**
💡	**Shopper uses store as part of purchase**	**13.25**	**9.69**	**-0.51%**
⚙	**Deduplicated total**	**26.49**	**28.12**	**+44.40%**

Multichannel retail increased over the holiday

The proportion of online orders connected to stores increased over the holiday period. **Over November and December, just over 28% of online orders were supported by stores.**
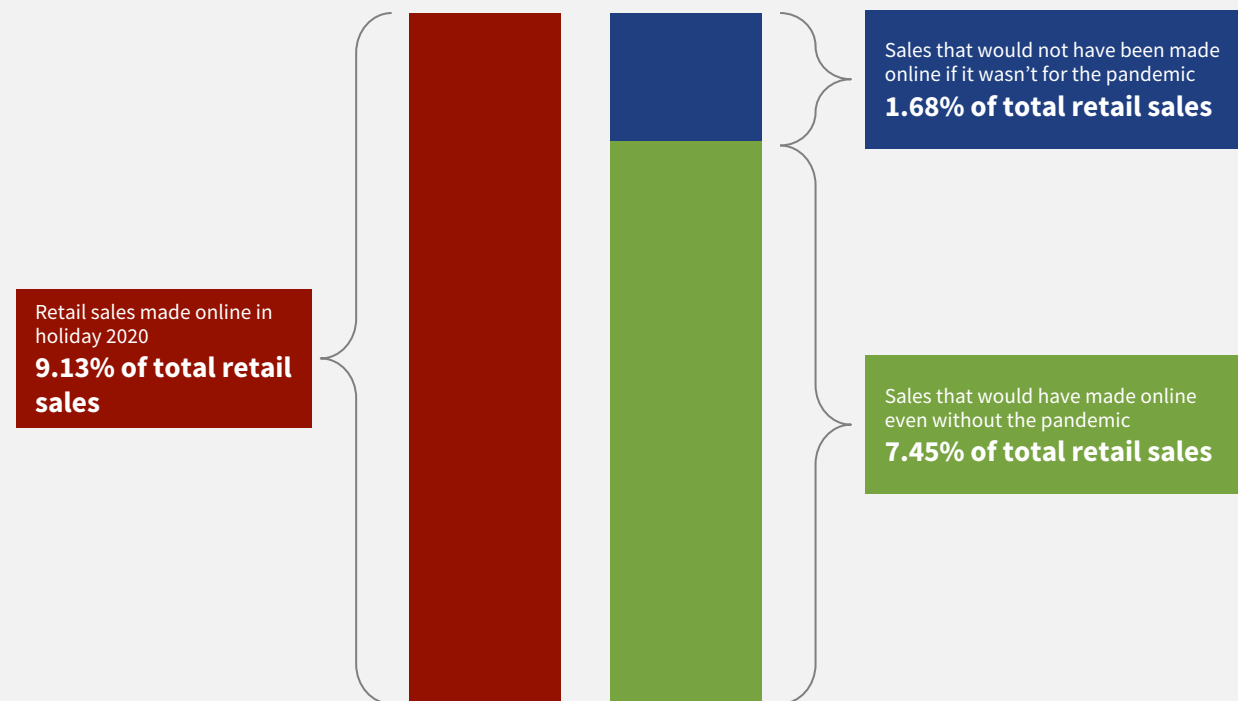
There was a sharp increase in both the proportion of online orders being collected from stores, and in the number of orders being shipped from stores. The latter was driven by more online grocery orders being fulfilled from physical shops to help retailers cope with elevated demand.

Numbers show the proportion of online sales connected to stores in various ways. The deduplicated total takes out overlap between the ways – e.g., an order where the customer browsed in store first, ordered online and then had the order shipped from a store. Note that 'shoppers uses store as part of the purchase process' includes visiting stores for inspiration, browsing or research plus after-purchase services (which are a small element).
Source: GlobalData analysis and market data

GlobalData.

Pandemic impact

How the pandemic inflated online sales

Proportion of online sales that were made because of the pandemic

Retail sales made online in holiday 2020
9.13% of total retail sales

Sales that would not have been made online if it wasn't for the pandemic
1.68% of total retail sales

Sales that would have made online even without the pandemic
7.45% of total retail sales

The pandemic inflated online retail, but not by as much as in other countries

Pandemic restrictions and concerns about in-person shopping inflated online penetration by 1.7 percentage points. The impact in Spain is lower than in other countries, mostly because the retail economy was more open during the period – especially nearer to Christmas.

Data show an estimate of the proportion of online sales over the holiday period that were made because the pandemic restricted shopping habits, either due to lockdowns or health concerns about in-person shopping

Source: GlobalData analysis and market data using GlobalData consumer panel research
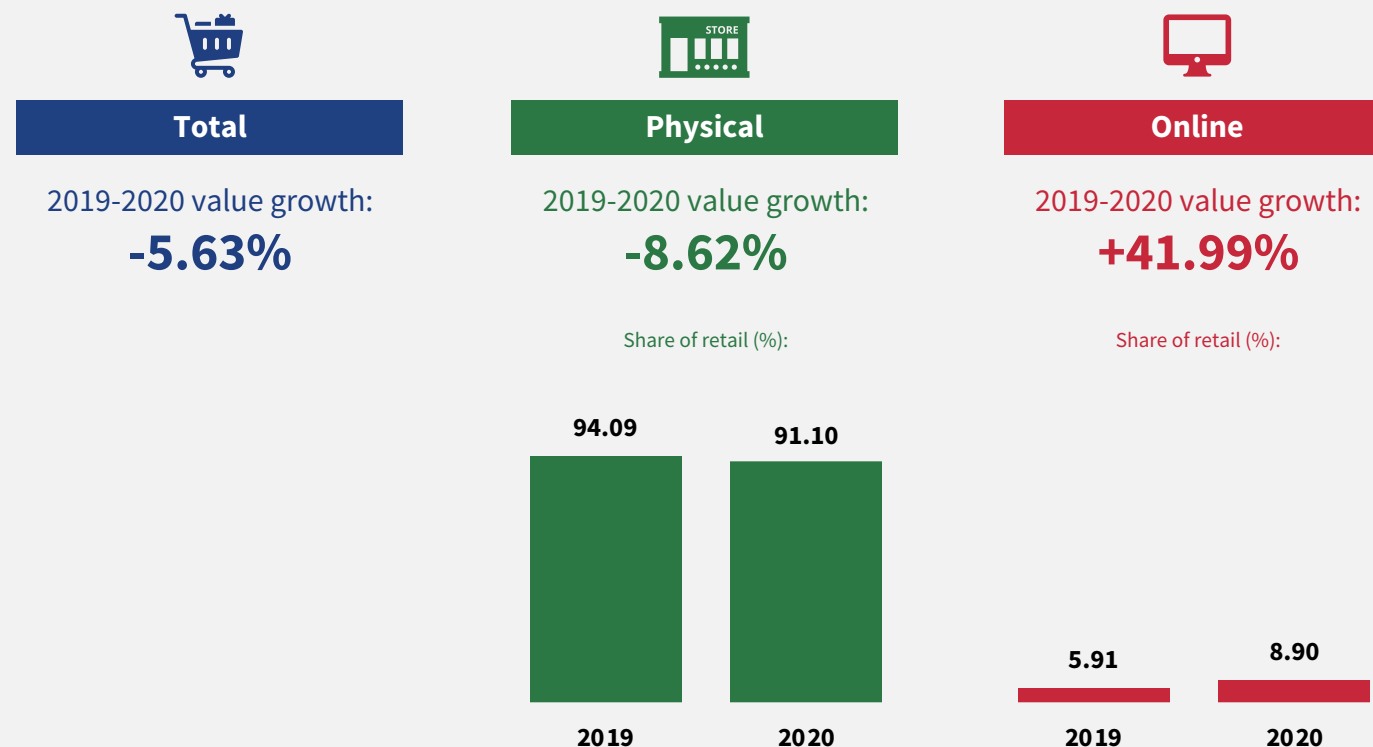
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Italy

Detailed data and insights for Italy

Holiday overview

Overall holiday sales dynamics
Growth, and share of retail 2019 and 2020

Total	**Physical**	**Online**
2019-2020 value growth:	2019-2020 value growth:	2019-2020 value growth:
-5.63%	**-8.62%**	**+41.99%**

Share of retail (%):

94.09	91.10	
2019	2020	
5.91	8.90	
2019	2020	

Italian online sales grew rapidly over the holidays

Italian online sales grew by almost 42% over the holiday period**. Given the embryonic nature of the Italian online channel, this growth rate is flattered as it comes from a low base.**

Total retail sales slumped thanks to lower consumer confidence, a lack of tourist spending, and some regional lockdowns which prevented Italians from visiting physical stores.

Data refer only to the holiday period which is November and December of each year. Penetration is total online sales in each year divided by total retail spending in that same year

Source: GlobalData analysis and market data

GlobalData.

Italy
Holiday food and non-food

Holiday food and non-food dynamics
Growth, and share of retail 2019 and 2020

	Food		**Non-food**	
Total	2019-2020 value growth: **+2.56%**	Share of retail: **2019: 100.00%** **2020: 100.00%**	2019-2020 value growth: **-13.75%**	Share of retail: **2019: 100.00%** **2020: 100.00%**
Physical	2019-2020 value growth: **+1.86%**	Share of retail: **2019: 99.31%** **2020: 98.64%**	2019-2020 value growth: **-20.23%**	Share of retail: **2019: 88.91%** **2020: 82.22%**
Online	2019-2020 value growth: **+102.74%**	Share of retail: **2019: 0.69%** **2020: 1.36%**	2019-2020 value growth: **+38.24%**	Share of retail: **2019: 11.09%** **2020: 17.78%**

Online sales of food more than doubled

With a more fragmented grocery sector than most other European markets, and with a higher share of independents, the online food market in Italy is relatively small. However, **the pandemic pushed more consumers into trying online services which, in turn, drove strong growth over the holiday period**.

Non-food sales slumped as shoppers cut back on non-essential items. Apparel was badly affected by the lack of both international and domestic tourists in the big Italian cities.

Data refer only to the holiday period which is November and December of each year. Penetration is total online sales in each year divided by total retail spending in that same year

Source: GlobalData analysis and market data

GlobalData.

Holiday multichannel

Holiday multichannel dynamics
Proportion of online orders linked to stores

		% of sales in 2019	% of sales in 2020	Growth in value:
🚗	**Customer collects from store**	**7.25**	**12.05**	**+135.99%**
🚚	**Retailer ships from store to customer**	**5.30**	**7.26**	**+94.50%**
💡	**Shopper uses store as part of purchase**	**14.83**	**10.19**	**-2.44%**
⚛	**Deduplicated total**	**24.07**	**27.29**	**+56.85%**

Customer collection drives up multichannel

The proportion of online sales supported by physical stores increased from 24% in holiday 2019 to 27% in holiday 2020.

A lot of this growth has come from consumers using click and collect type services to avoid full in-person shopping. Traditionally, this has been a relatively small market in Italy. However, the pandemic has accelerated its growth as more people have become aware of these services as a hybrid between shopping in-person and shopping online.

Numbers show the proportion of online sales connected to stores in various ways. The deduplicated total takes out overlap between the ways – e.g., an order where the customer browsed in store first, ordered online and then had the order shipped from a store. Note that 'shoppers uses store as part of the purchase process' includes visiting stores for inspiration, browsing or research plus after-purchase services (which are a small element).
Source: GlobalData analysis and market data

GlobalData.

Pandemic impact

How the pandemic inflated online sales

Proportion of online sales that were made because of the pandemic

Sales that would not have been made online if it wasn't for the pandemic
2.39% of total retail sales

Retail sales made online in holiday 2020
8.90% of total retail sales

Sales that would have made online even without the pandemic
6.51% of total retail sales

The pandemic has inflated online penetration and growth in Italy

Italy's lockdown was shorter than the UK and France, and it was more partial than Germany because restrictions were regional. As such, while the pandemic did accelerate retail sales, it did not do so by as much as in those other countries.

Nevertheless, **pandemic disruption inflated Italy's online penetration by almost 2.4 percentage points during the holiday period**.

Data show an estimate of the proportion of online sales over the holiday period that were made because the pandemic restricted shopping habits, either due to lockdowns or health concerns about in-person shopping

Source: GlobalData analysis and market data using GlobalData consumer panel research

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Details

Definitions, explanations, methodology

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Definitions and explanations

Product and market definitions

- **Retail.** The report and data cover the retail market. This includes all consumer product segments (see below for more details). Digital products, such as individual music downloads and e-books, are also included. The following are excluded: business to business sales, secondhand goods, wholesale trade, gasoline and fuel, automotive vehicles (auto accessories are included), foodservice, household services such as plumbing and installation, medical devices, prescription drugs, travel, insurance, subscriptions services such as Netflix, etc.

- **Food.** The food part of retail includes all food and drink based products bought from retailers. Household essentials such as cleaning and paper products are also included. Alcohol and tobacco are included under food.

- **Non-food.** The non-food part of retail is everything that is not specified under food. This includes homewares, furniture, home improvement, electronics, apparel, health, beauty, sports, games, leisure and hobby, entertainment, and other various products.

- **Taxes.** Taxes such as sales tax and VAT, that is added to the cost of goods as per law or regulation. Numbers in this report include taxes.

Channel definitions

- **Online sales.** This means a transaction that is made online – i.e., payment for the product is made online regardless of the other channels used during the shopping journey. For example, a product paid for online and collected in store is counted as an online sale.

- **Physical sales or store sales.** This means a transaction that is made in a physical store – i.e., payment for the product is made in a store regardless of the other channels used during the shopping journey. For example, a product paid for in store and then delivered to a customer at home is counted as a physical sale.

- **Other channel sales.** Other channels include mail order, telephone and television shopping. These form a relatively small element of most markets.

- **Online.** Online includes all methods of digital shopping such as via a desktop, laptop, mobile phone, social shopping, and so forth. Ordering via an online kiosk within a store is considered online shopping. However, placing an order in store where staff place the order and then take payment is counted as physical shopping.

- **Physical stores.** These cover all types of physical location where products are sold. Traditional retail stores such as mass merchants, grocery stores, specialist stores, convenience stores, drugstores, etc. are included. So too are market stalls, pop-up shops, in-mall kiosks, vending machines, sales from mobile trucks, and so forth.

- **Online penetration.** The proportion of retail sales where the transaction is made online.

- **Physical penetration.** The proportion of retail sales where the transaction is made in stores.

Multichannel definitions

- **Multichannel. Sometimes called omnichannel.** The use of more than one channel during a single purchase. To be a multichannel purchase, the consumer must make use of more than one channel during a given shopping journey.

- **Shopping journey.** The complete process undertaken when buying something. This involves everything from the initial purchase trigger through to after care or service. The shopping journey is much wider than the point of transaction. The shopping journey is shown in detail on subsequent pages.

- **Point of transaction.** The part of the shopping journey that involves payment for the product being bought.

- **Receiving the product.** Sometimes called point of fulfilment. The part of the shopping journey that involves receiving the product.

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Definitions and explanations

Multichannel definitions, cont…

- **Driver of sales.** Anything which forms part of the shopping journey and contributes to the point of transaction.

- **Influencer of sales.** The same as driver of sales.

- **Returns.** Products which are returned to the retailer for whatever reason. Returns do not necessarily need to be made via the same channel that fulfilled the product. Where this is the case, the shopping journey technically becomes multichannel. However, as the product has been returned it does not count as a sale and so has no impact on the numbers.

- **After care or service.** Advice, assistance or help given after a purchase has been made. For example, training on how to use or setup electronics.

Fulfilment definitions

- **Collect from store.** Also called buy online pickup from/in store, BOPIS or BOPUS. A service where consumers pay for a product online but then collect the product they have purchased from inside of a store. This includes in-store locker collection as well as collection from dedicated collection service points. Note that collection from warehouses or specialist facilities completely removed from stores is not included.

- **Curbside collection.** Also called drive-up, curbside pickup, or trunk delivery. A service where consumers pay for a product online but then collect the product they have purchased from outside of a physical store. This includes services where the product or products are brought directly to cars and methods such as outdoor locker collection. Note that collection from warehouses or specialist facilities completely removed from stores is not included.

- **Click and collect.** A generic term for buying online and collecting from a physical location. Note that this term is sometimes used to refer exclusively to collect from store services.

- **Delivery.** Delivery of the products to an end location such as home or to a workplace, usually via a carrier like FedEx or Royal Mail, etc., or via the retailer's own distribution and fulfilment network.

- **Ship-to-store.** A service where an online order is shipped from a warehouse or distribution center to a store for collection by a shopper. Within this report, this kind of service is included under collect from store and the sale would be included under online.

- **Ship-from-store.** Also called store-based fulfillment. A service where an online order is shipped from a physical shop to an end location such as a home or workplace. Within this report, these orders would be included under the online channel.

Other definitions

- **Delivery charges**. Additional charges or fees, over and above the product costs, which are levied on orders to cover fulfillment. Delivery fees are not included in any numbers within this report.

- **Years and months.** Unless otherwise stated, all time periods are calendar years and months rather than financial periods of reporting.

- **Holiday**. Also called holiday period or holiday trading. This refers to all retail sales made over the months of November and December regardless of whether the spend was made on holiday or other items.

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The shopping journey

- The shopping journey is used to understand the complete process of shopping. It is much wider than simply looking at where the transaction is made, which is the traditional, but rather limited, way of measuring sales.

- The principle here is that the point of transaction does not exist in isolation. A significant number of transactions are part of a wider shopping journey that involves multiple stages. Across each of these steps the consumer may use a variety of different channels to meet their needs. There are an enormous number of journey permutations, making it complex to map consumer behaviors.

- The diagrams opposite show the shopping journey framework we use.

- A multichannel sale is where more than one channel has been used within a single shopping journey. This can involve any combination of channels and stages within the journey. So, for example, browsing products in stores and then transacting online is classified as multichannel. So is transacting online and then collecting a product from store.

- To understand multichannel sales, we used the following broad process:

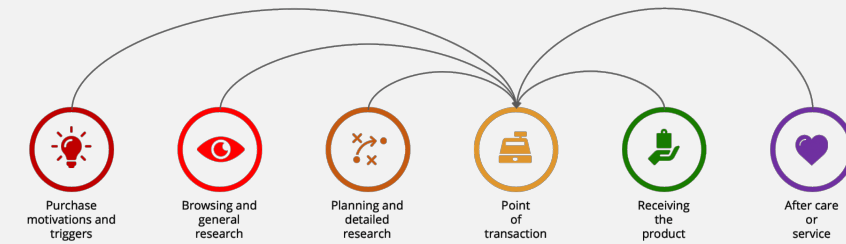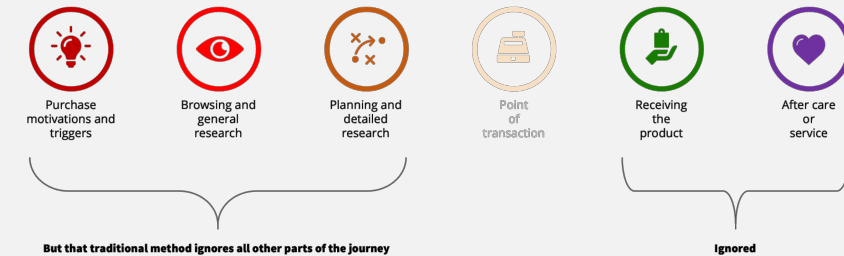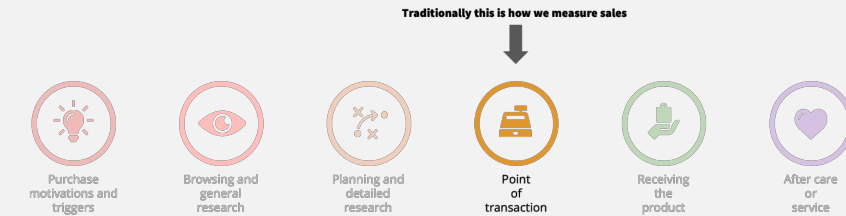| |
|---|
| 1. Profiled spending, by food and non-food, for consumers: how much they spent in each channel across each month |
| 2. Found what activities they typically undertook when shopping for products in the store and online channels |
| 3. Identified what proportion of spend each activity applied to over the course of the month |
| 4. Calculated the total spend attributable to each activity in the journey over the course of the month |
| 5. Removed duplication (i.e. people undertaking more than one activity on the journey) to get a total influence/support spend for each segment |
| 6. Totaled up food and non-food for the overall influence/support spend |

Traditionally this is how we measure sales

Purchase motivations and triggers · Browsing and general research · Planning and detailed research · Point of transaction · Receiving the product · After care or service

Purchase motivations and triggers · Browsing and general research · Planning and detailed research · Point of transaction · Receiving the product · After care or service

But that traditional method ignores all other parts of the journey   **Ignored**

Purchase motivations and triggers · Browsing and general research · Planning and detailed research · Point of transaction · Receiving the product · After care or service

We need to understand how much the other stages influence and support the point of transaction

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Methodology and inputs

To calculate the numbers the following inputs were used:

- GlobalData's consumer panel, which has tracked detailed weekly shopping behaviors and buying habits of a representative sample of over 107,000 consumers since the pandemic started in March 2020.

- This consumer data was supplemented by further consumer research to assess views and opinions on a variety of multichannel topics. For this a survey of 4,020 consumers across the countries was conducted in early January of 2021. Sampling was representative in terms of the population profile.

- Data provided by individual retailers which breaks down transactions and fulfillment by channel and, where available, customer habits and shopping patterns.

- All the data are built into our model of consumer spending which allows us to calculate the various metrics on a national level. Retail analysts carry out several checks on this model to ensure its accuracy and validity. This includes checking against data from individual retailers, official government data, industry data and other sources.

- An exhaustive review and analysis of existing reports on the consumer spending habits in the broader retail industry was also conducted as part of the checking and research process.

- Where provided, forecast data is modelled using a three-step process:
  1. Cross-correlation auto regression of inputs over time
  2. Bayesian techniques refine to single-most robust forecast
  3. Cross-correlation auto regression and Bayesian refinement for the final output

- Inputs for the forecasting model include standard economic and social variables as well as specific data from consumer research, retailer predictions and retail metrics such as store numbers.

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About GlobalData

GlobalData is a global research agency and consulting firm. Within the firm's retail division, our work focuses on all aspects of retailing and consumer behavior, which we deliver through a variety of different reports and our interactive Intelligence Centre. We also undertake bespoke research and consulting work for clients.

We are headquartered in New York and London with offices across the world. Our analysts and researchers work to understand the latest trends and developments in retailing across developed and emerging markets. We also have a global panel of consumers which we use to undertake consumer surveys and to gauge and assess sentiment and views on various retail issues.

We work with many of the world's leading retailers, FMCG groups, property firms and those in the financial sector to help them maximize success through developing a thorough understanding of the retail sector and its likely future performance.

Further information

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