

Swiss Christmas Retail Survey 2013 The informed consumer



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Swiss Christmas Retail Survey 2013

The informed consumer



Deloitte is proud to present its annual Christmas survey polling European consumers on their spending patterns during the Christmas shopping season. Our member firms have published this survey since 1998, Switzerland has contributed to the research since 2007.

Overall consumer sentiment in Switzerland remains cautiously optimistic. In the Eurozone, only consumers in Germany and Denmark have a more positive outlook for the economy. However while the majority of Swiss Consumers surveyed are still cautious about the future economy, they are planning to increase their Christmas spending this year by 3% from 2012 estimates to CHF 807 per household.

While physical stores remain the most important points of sale, online shopping is increasing its share with now 39 % of Swiss consumers surveyed planning to buy online. While mostly a shopping enabler, M-commerce is a powerful change driver that has the potential of merging offline and online shopping channels with shoppers using their smartphones to research and buy at home and when in store. More than ever our survey highlights a disparity between presents given and those wished for, which provides a challenge but perhaps also an opportunity for retailers with the potential for a post-Christmas rush to exchange unwanted gifts.

We wish you an interesting read; a joyful and peaceful Christmas; and a prosperous 2014.

A handwritten signature in blue ink, consisting of stylized, overlapping loops and a long horizontal stroke at the end.

Howard da Silva

Consumer Business Industry Leader

Inside the consumer mindset

How do you rate the current state of the economy?

For the first time since 2008 there are countries with an optimistic view on the current state of the economy.

In general, interviewed countries are less pessimistic about the state of the economy compared to the last year; exceptions being the Netherlands, Poland, Ukraine, Finland, Russia and South Africa.

We can see an East-West split of opinion in Europe: Eastern Europe is less pessimistic, together with Germany and Denmark as the only two countries to be overall optimistic this year. Western Europe is still deep in the crisis, with an upward trend in almost all included countries.

Index between positive and negative answers

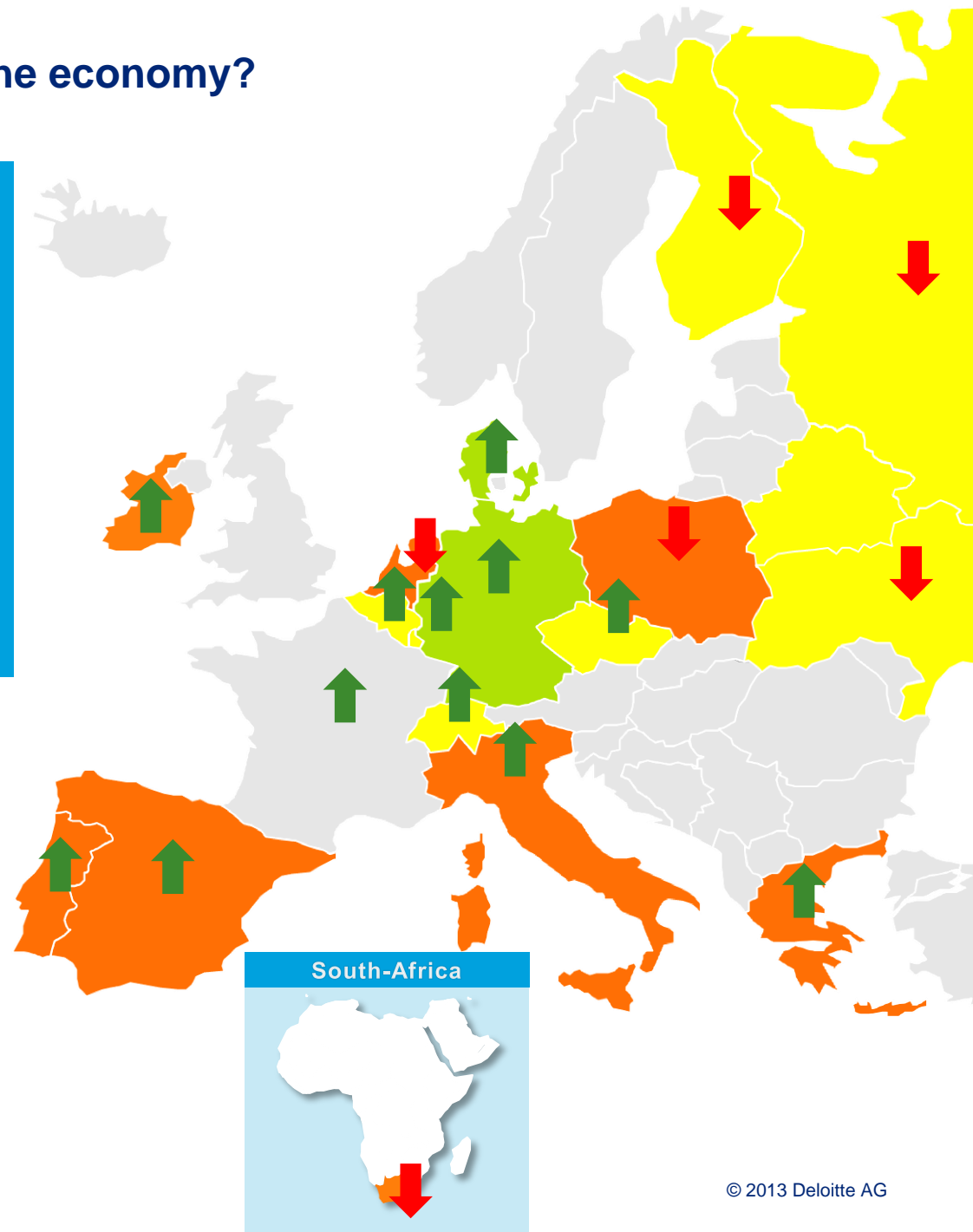
Orange < -40%

Yellow -40% to 0%

Green > or = 0%

Red arrow A downward trend

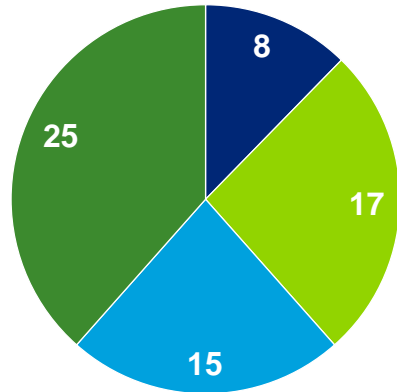
Green arrow An upward trend



How do you rate the current state of the economy?

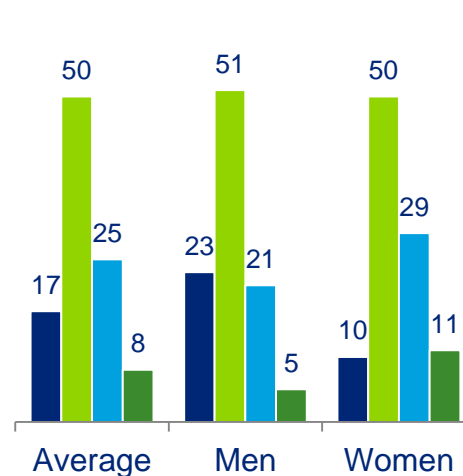
Figures in percentage

Switzerland



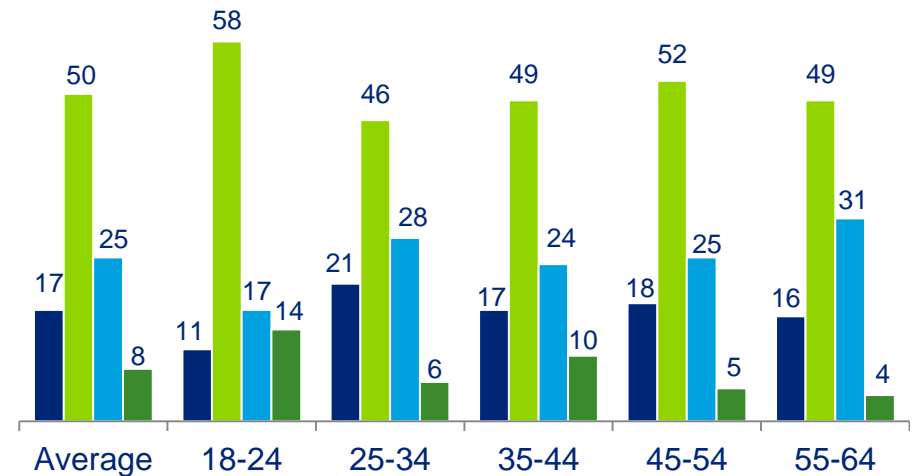
■ Positive ■ Neutral
■ Negative ■ I don't know

Gender



■ Positive ■ Negative
■ Neutral ■ I don't know

Age



■ Positive ■ Negative ■ Neutral ■ I don't know

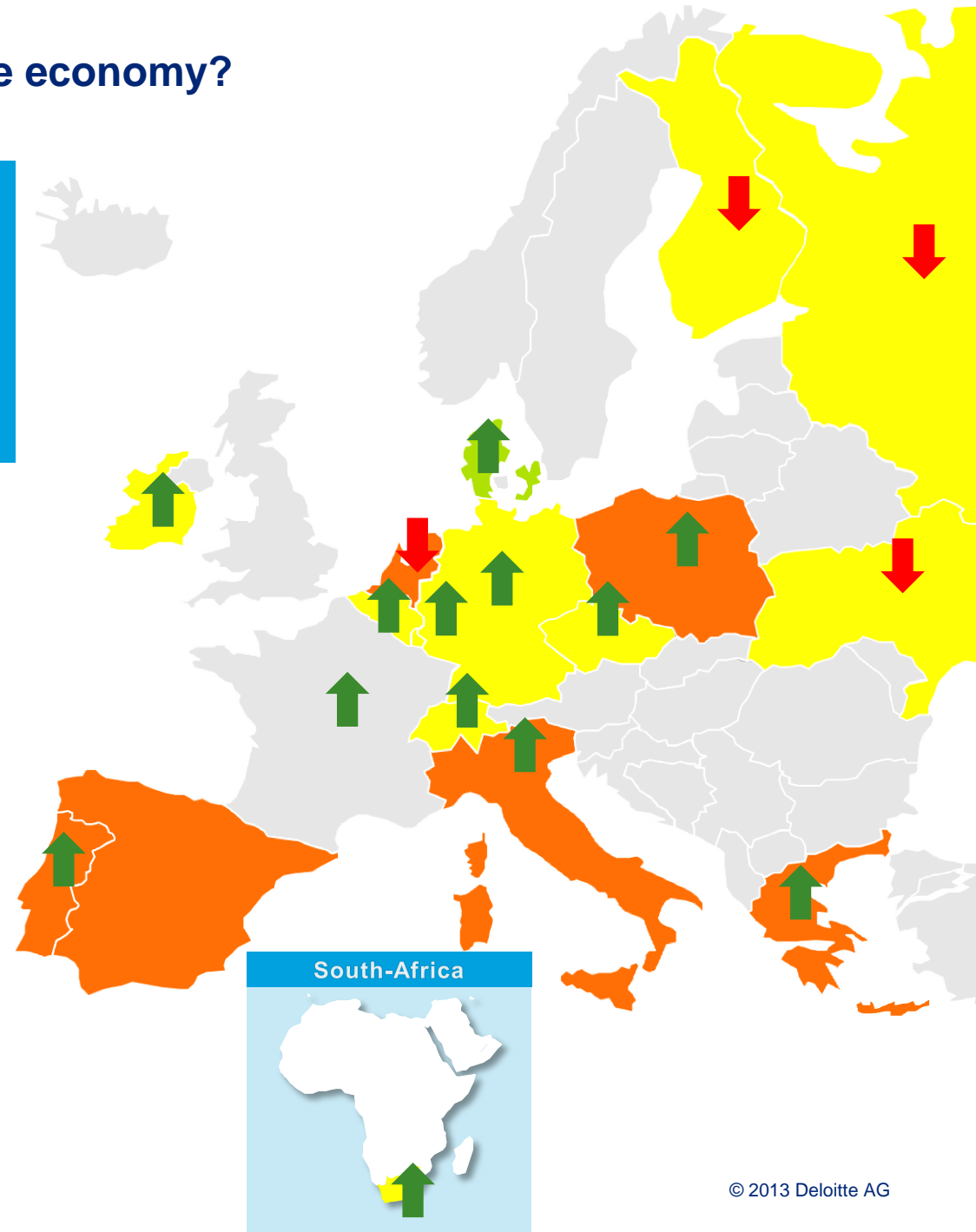
- Swiss consumers view the current state of the Swiss economy more optimistically than last year: only 25% of them are pessimistic, compared to a third last year.
- As each year, men have a more optimistic outlook than women.
- One interesting point is that Swiss consumers aged 45 years and more do not have a significantly more pessimistic vision than the other age groups which is generally the case for other Europeans.

How do you rate the future state of the economy?

All countries are less pessimistic about the future state of the economy than last year excepted the Netherlands, Ukraine, Finland and Russia.

As in 2012, the only country to be optimistic is Denmark.

In 2011, no country was optimistic.



Index between positive and negative answers

 < -25%

 -25% to 0%

 > or = 0%

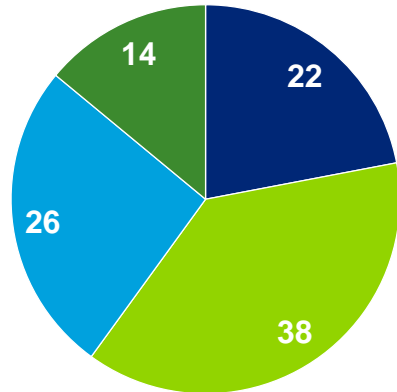
 A downward trend

 An upward trend

How do you rate the future state of the economy?

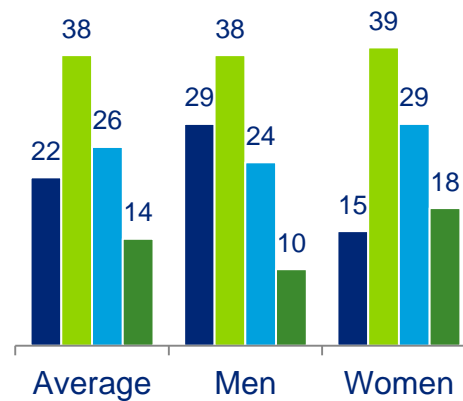
Figures in percentage

Switzerland



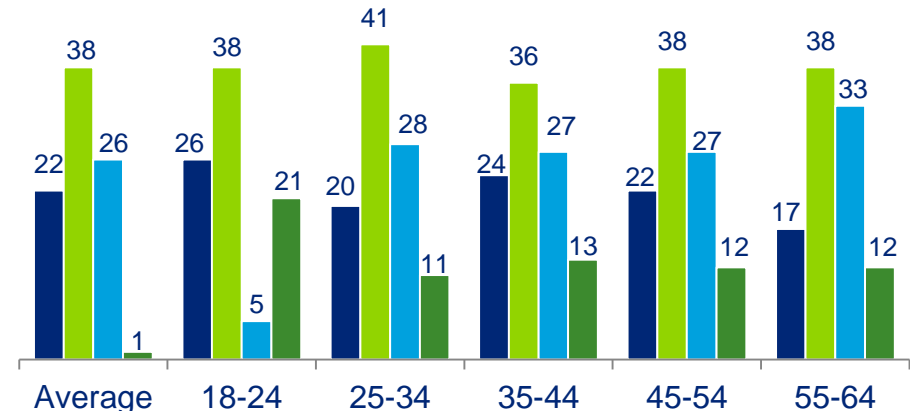
■ Positive ■ Neutral
■ Negative ■ I don't know

Gender



■ Positive ■ Neutral
■ Negative ■ I don't know

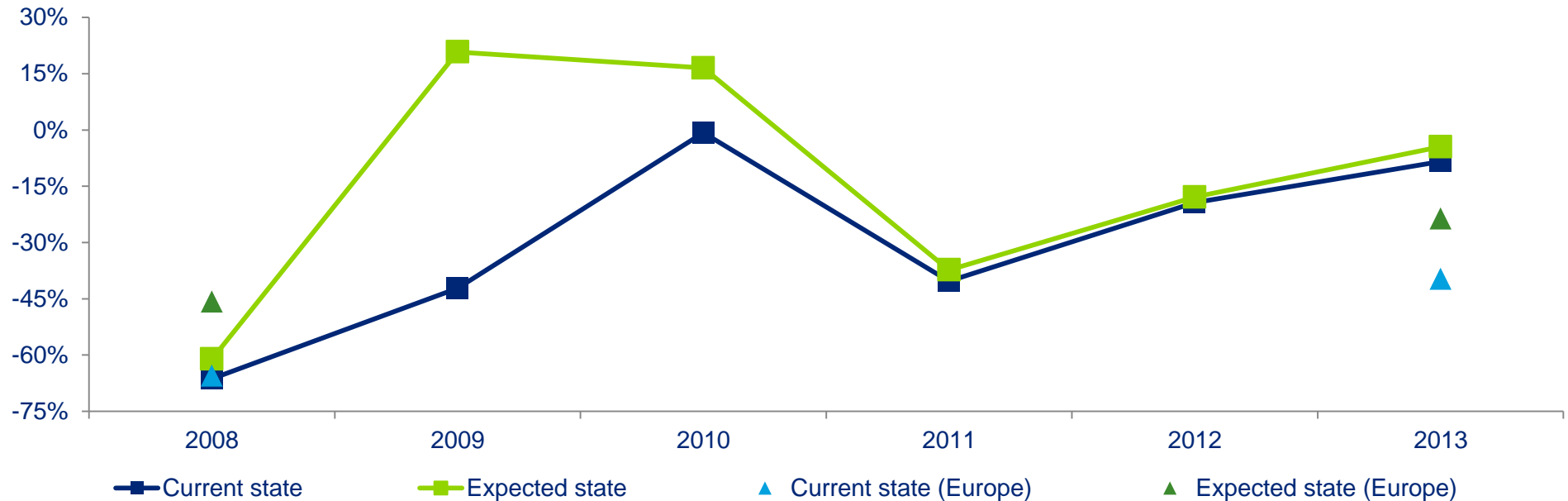
Age



■ Positive ■ Neutral ■ Negative ■ I don't know

- The Swiss consumers are more optimistic about the future state of the economy than other Europeans. 60% of Swiss consumers think the future state of the economy will be the same or positive, compared to 45% of Europeans.
- Men and people aged 18-24 years have a more optimistic vision than the other age groups.

How did the rating of the current/future state of the economy develop?

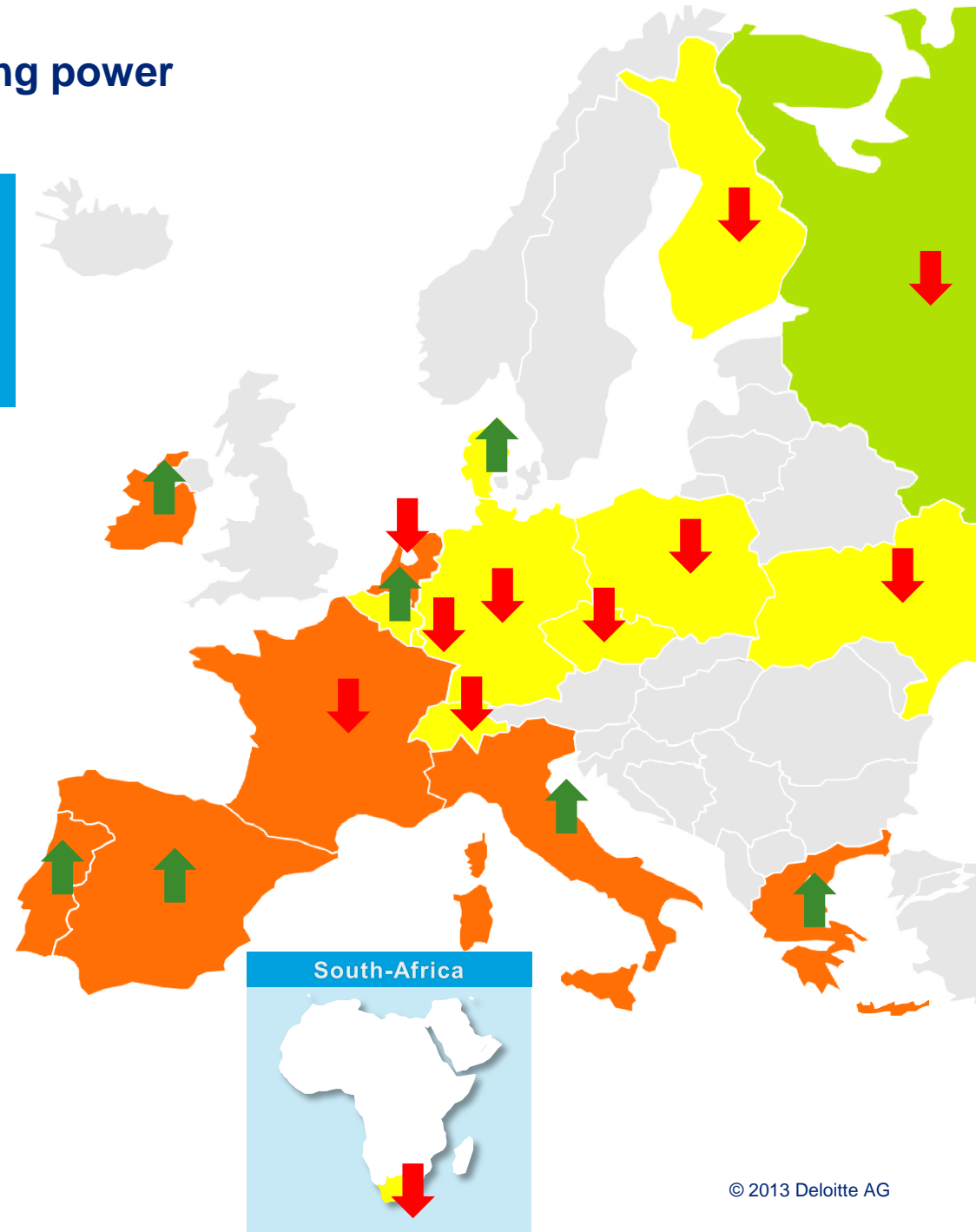


- In the last three years, assessment of the current state of the economy by the Swiss consumers is very close to their assessment of the future state of the economy and it is rising steadily.
- Historically, the Europeans are less pessimistic regarding the future state of the economy than regarding the current state of the economy.
- In all countries the pessimism about the future state of the economy is lower than the pessimism about the current state of the economy, excluding Germany, Switzerland and Czech Republic.

How would you describe your spending power compared to last year?

The most pessimistic countries are less so than last year, except the Netherlands and France.

Conversely, the most optimistic countries are more pessimistic than last year, except Belgium and Denmark.



Index between positive and negative answers

Orange < -25%

Yellow -25% to 0%

Green > or = 0%

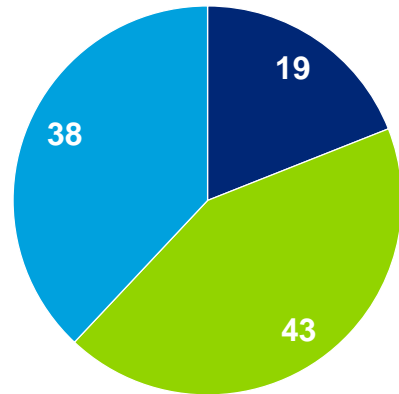
Red arrow A downward trend

Green arrow An upward trend

How would you describe your spending power compared to last year?

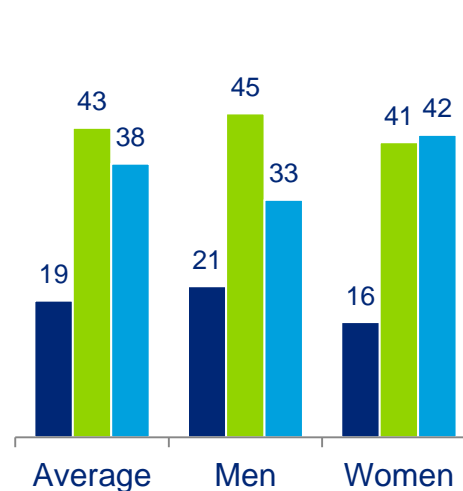
Figures in percentage

Switzerland



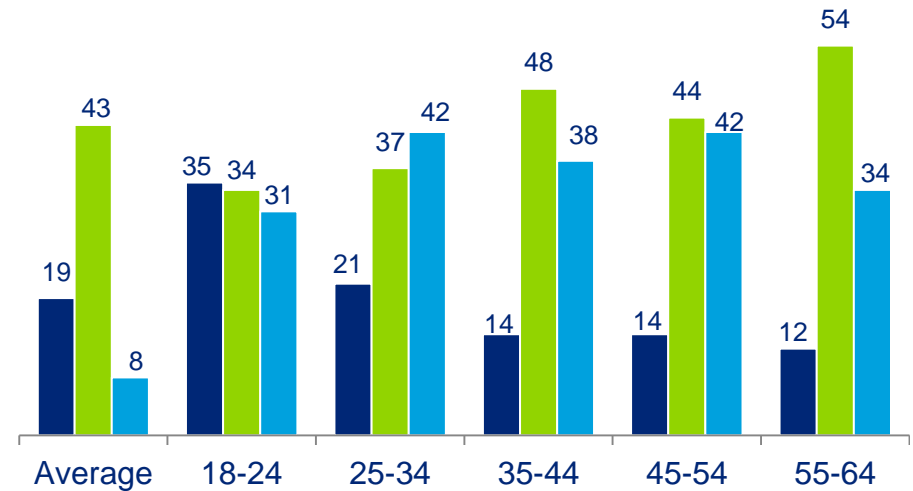
■ I have more to spend
 ■ I have the same amount to spend
 ■ I have less to spend

Gender



■ I have more to spend
 ■ I have the same amount to spend
 ■ I have less to spend

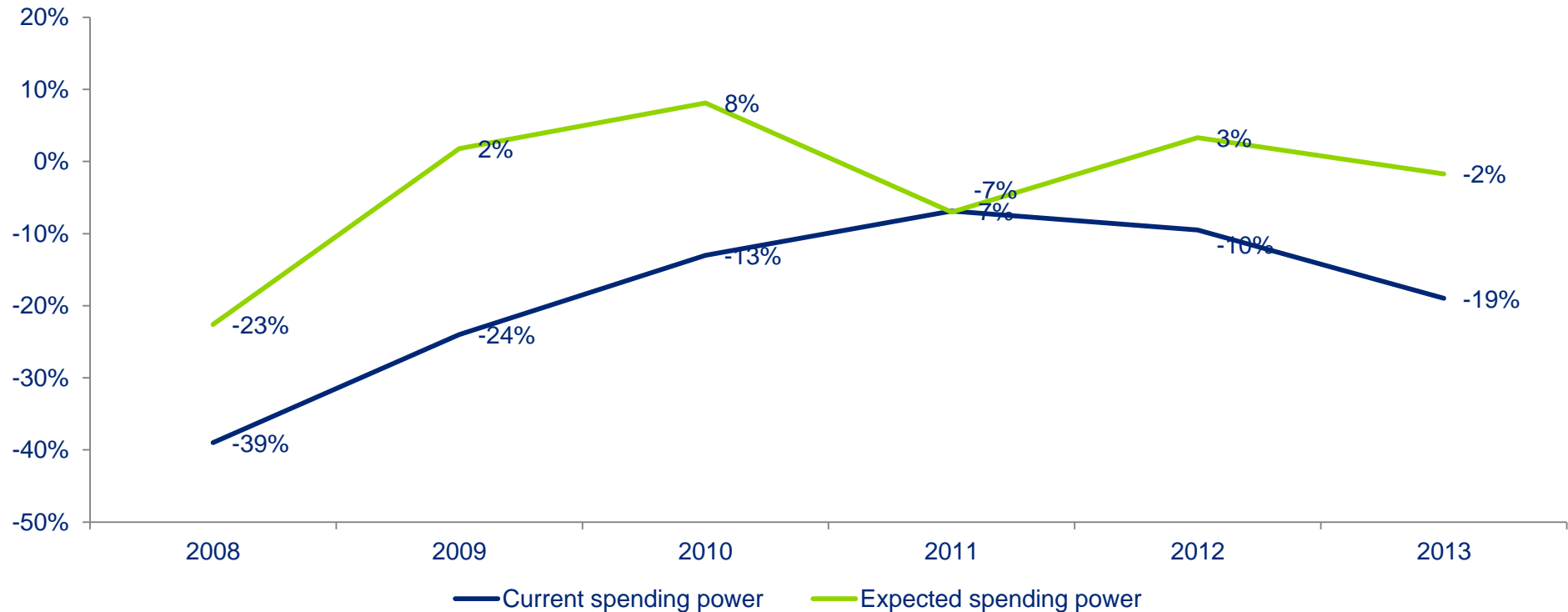
Age



■ I have more to spend
 ■ I have the same amount to spend
 ■ I have less to spend

- Consumer sentiment in Switzerland is more positive than the European average. 62% of Swiss consumers believe they have the same or higher spending power than a year ago, compared to 59% of the Europeans.
- As with the general economic outlook, men and people aged 18-24 years are more optimistic regarding their spending power than other age groups.

How would you describe your spending power compared to last year? (cont.)



- The trend over the last year is more pessimistic in Switzerland.
- There is an even more pessimistic sentiment in Europe: index based on the sum of positive and negative answers shows -24% for current spending power, a decrease of 1% compared to 2012.

Holiday budget

Comparison budget 2012-13 (without travelling)

3% to ...

| | |
|--------------------|-------|
| Ukraine (374€) | 17.4% |
| Russia (442€) | 13.1% |
| Germany (399€) | 6.7% |
| Poland (268€) | 5.4% |
| Switzerland (656€) | 3.0% |

0% to 3%

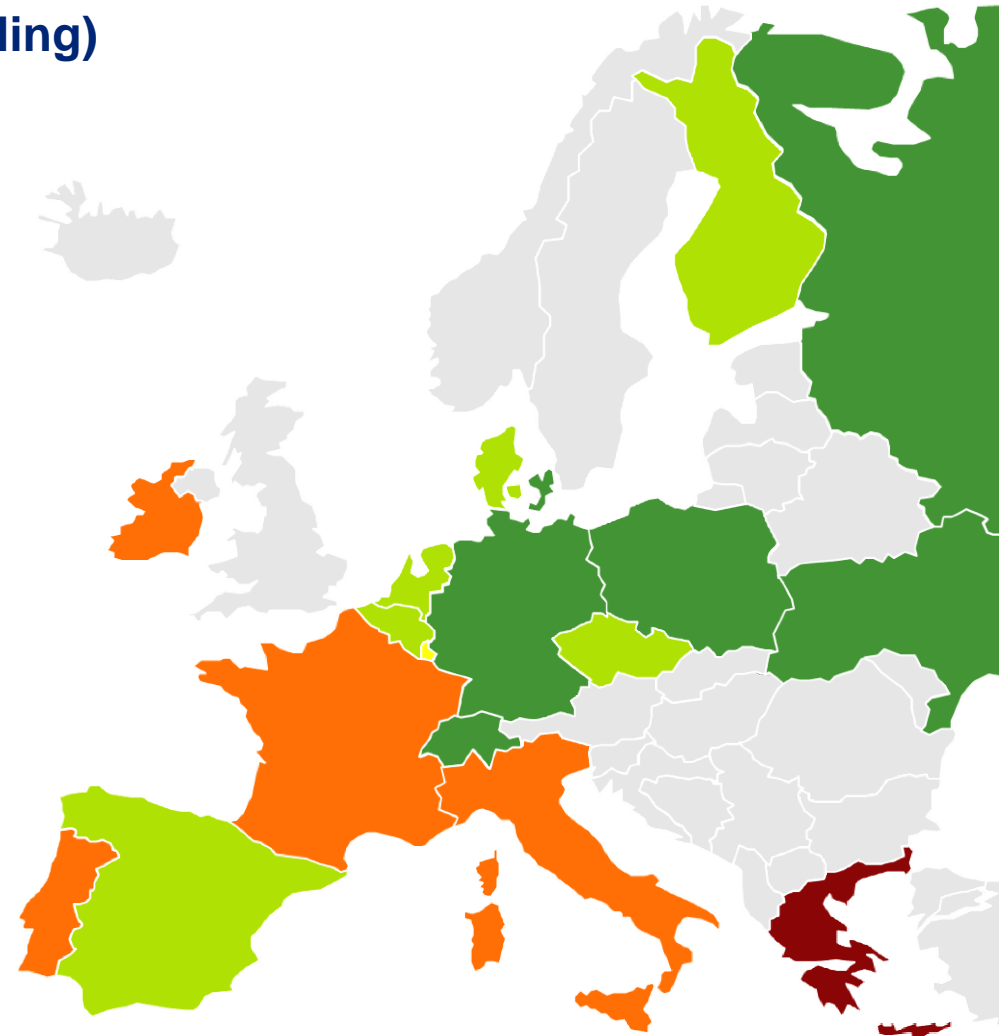
| | |
|------------------------|------|
| Finland (692€) | 1.3% |
| Denmark (634€) | 1.1% |
| Spain (567€) | 1.0% |
| Czech Republic (430€) | 0.8% |
| Belgium (503€) | 0.6% |
| The Netherlands (286€) | 0.3% |
| Luxembourg (825€) | 0.2% |

0% to -3%

| | |
|-----------------|-------|
| France (531€) | -0.9% |
| Ireland (894€) | -1.7% |
| Portugal (393€) | -2.3% |
| Italy (477€) | -2.4% |

-3% to ...

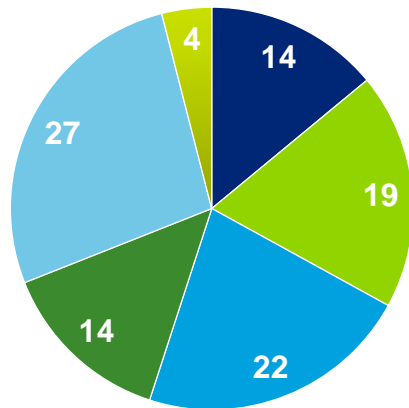
| | |
|---------------|--------|
| Greece (451€) | -12.8% |
|---------------|--------|



In your household, what will be the total holiday budget for gifts for the following people for year end festivities 2013?

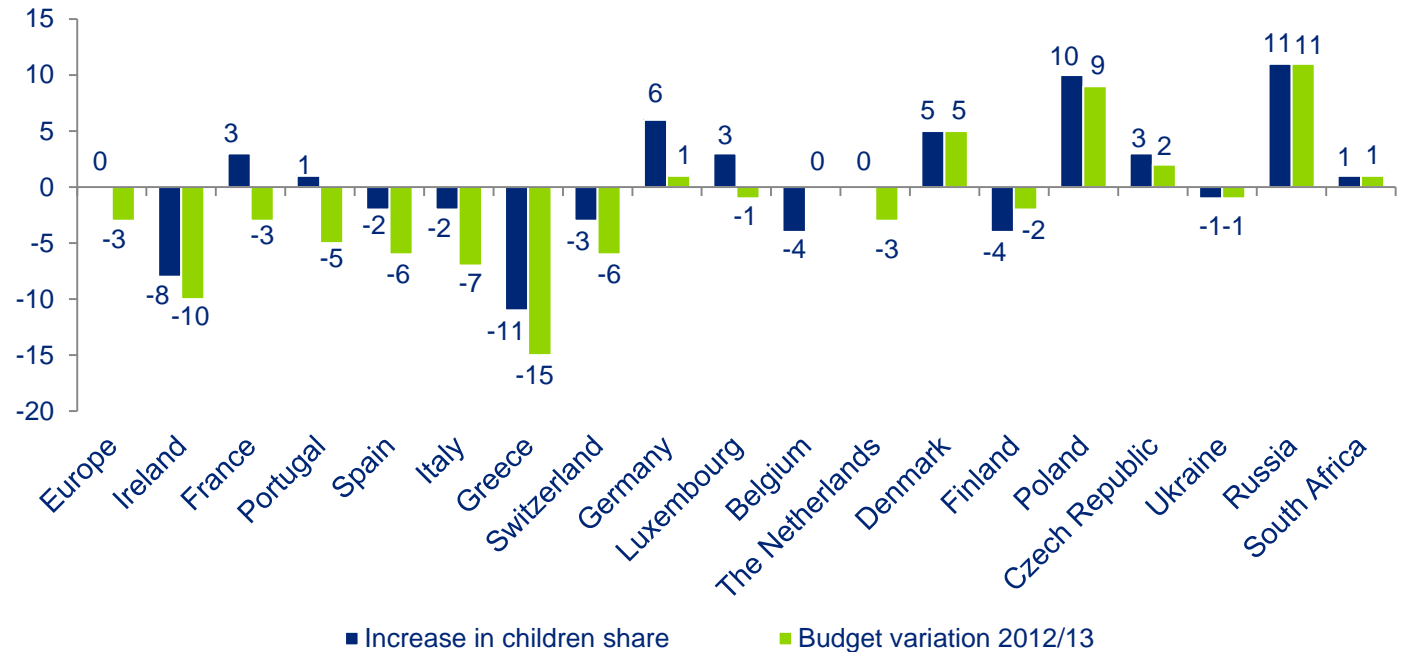
Figures in percentage

Switzerland



■ Yourself
 ■ Your partner
 ■ Your children
 ■ Other children
 ■ Other adults
 ■ Charity donations

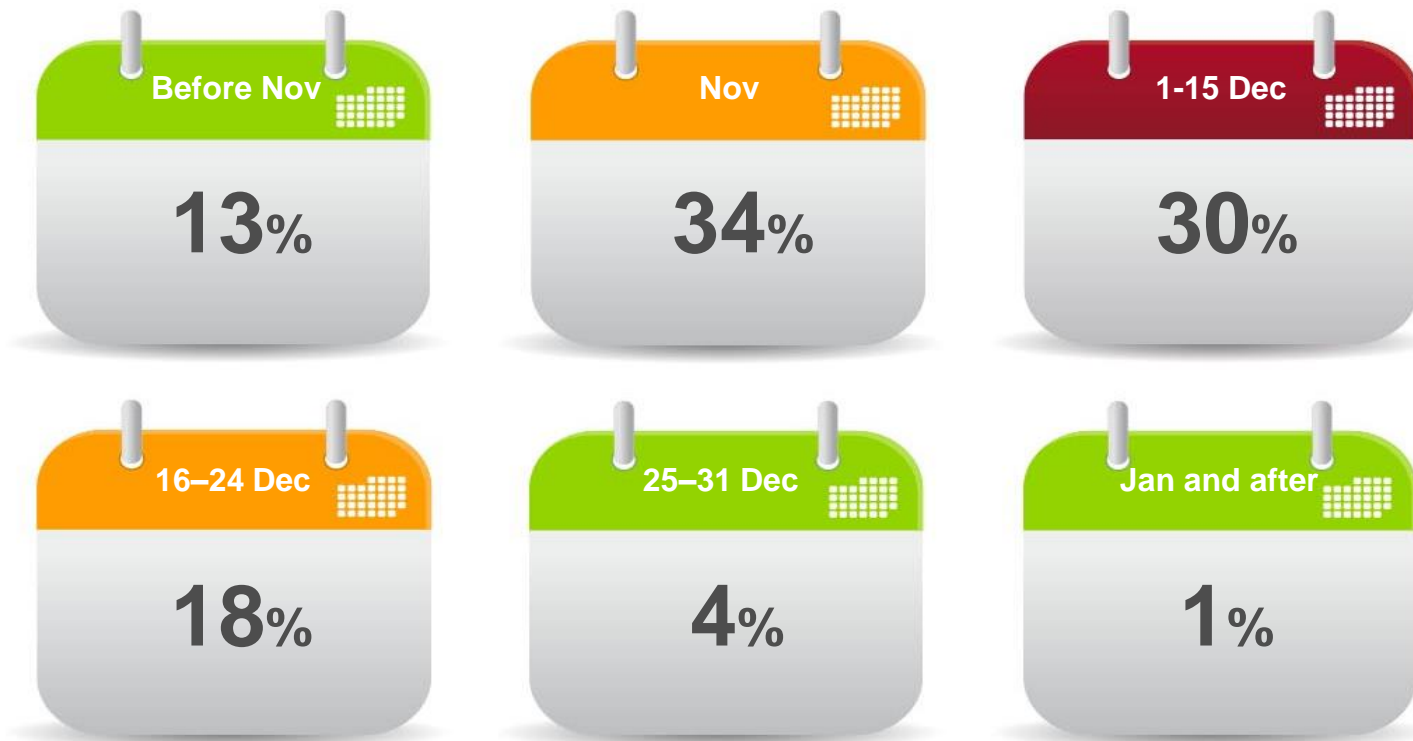
Overall



- Consumers in most European countries have to cut their Christmas budgets, but the average share for children in the total gift budget has increased.
- The share of “your children” reaches the highest level since 2008.
- By contrast, Switzerland is among the countries in which children’s share decreased.

Shopper priorities

When do you expect to purchase the majority of your gifts for this year versus last year?

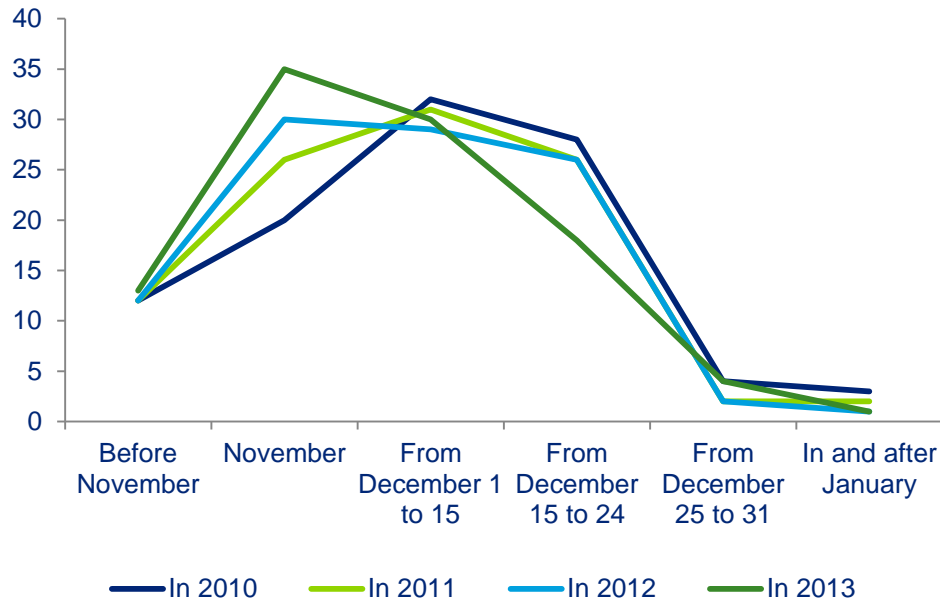


- More than half of Europeans purchase their gifts between December 1st and 24th.
- Percentage of Swiss consumers buying Christmas gifts during the last 24 days before Christmas represents 48%.
- 47% of Swiss consumers plan their Christmas purchases further ahead — buying gifts by the end of November.

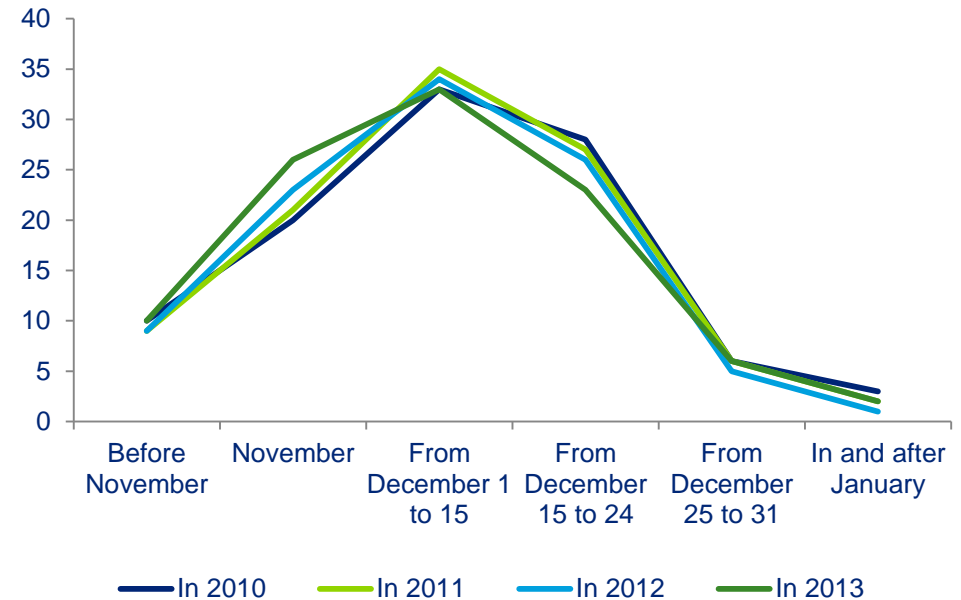
When do you expect to purchase the majority of your gifts for this year versus last year? (cont.)

Figures in percentage

Switzerland



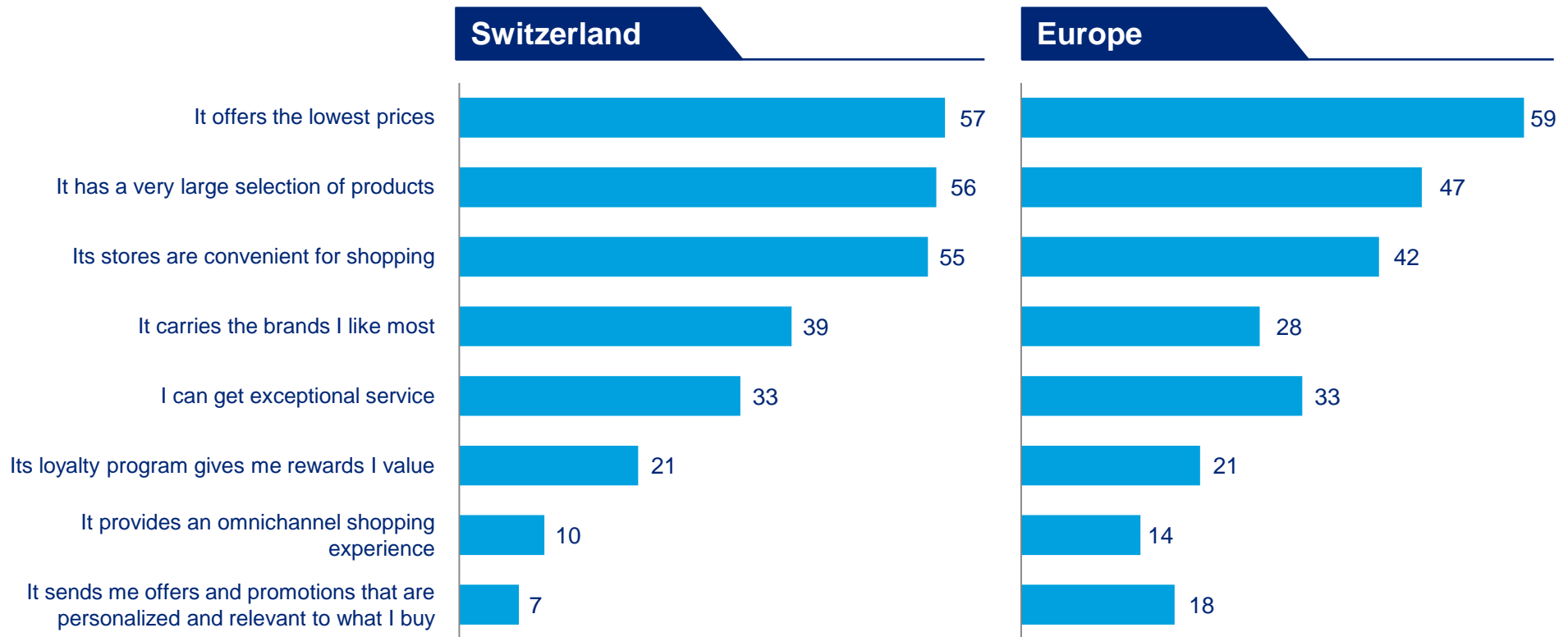
Europe



- Since 2010, Swiss consumers tend to increase their purchases in November (34% in 2013) to the detriment of the week before Christmas.
- The same trend is noticeable for Europe as a whole although it is not as pronounced as in Switzerland.

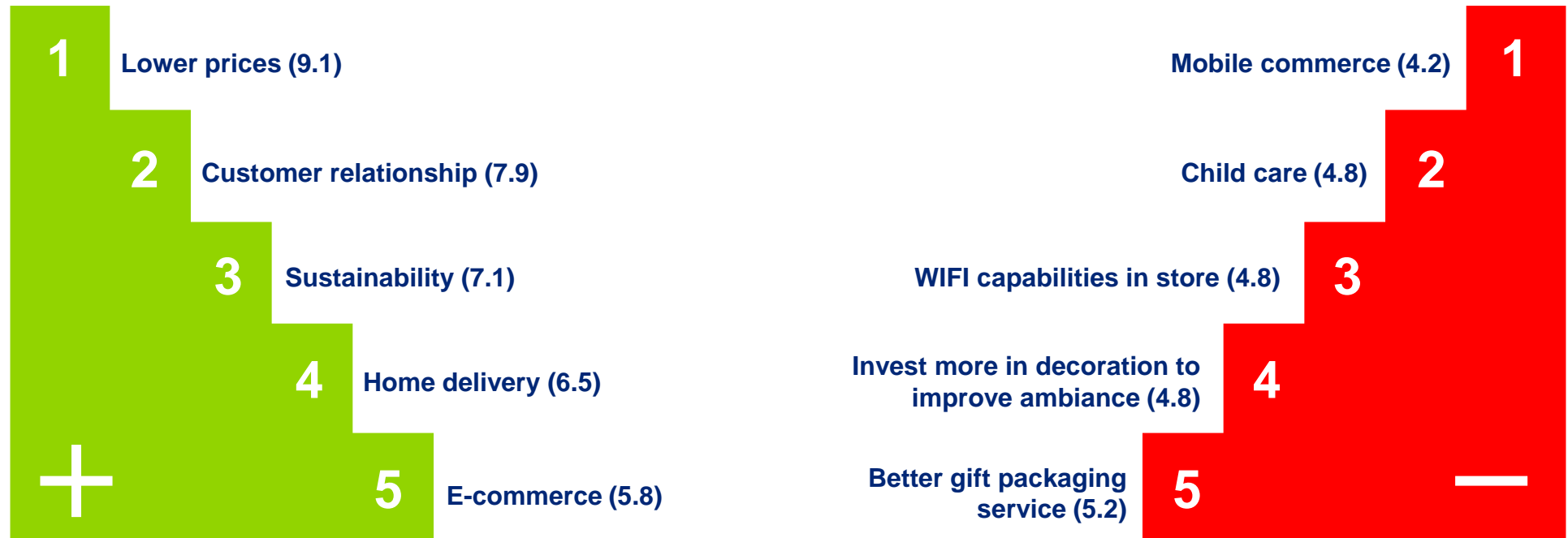
When shopping, what are the top three most important attributes of a retailer?

Figures in percentage



- Once again, low price is the most important attribute for improving consumers' shopping experience, and this is the case for almost 3/5 of the European population.
- Product choice comes next for half of European consumers.
- Those 2 attributes are generally linked to online shopping where better deals and a vast selection of product choices are widely available.

Which area would you expect retailers to invest in, in order to improve your shopping experience?

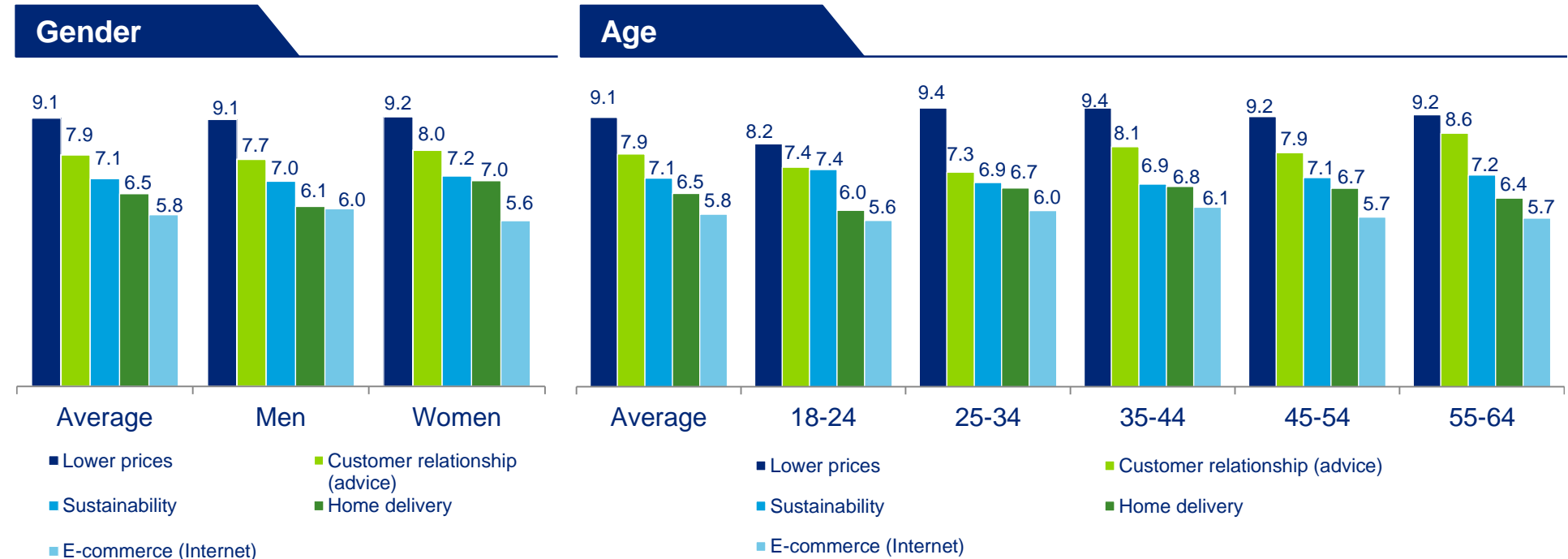


Note: scale of 10 points, importance increasing from 0 to 10. Answers from Swiss consumers

- Lower prices is what Swiss consumers want above all. They would further appreciate retailers investing in the customer relationship, sustainability and home delivery.
- On the other hand, mobile commerce, child care facilities and WIFI capabilities in the store were among the least valued improvements.
- Swiss consumers thus seem to have traditional expectations — successful retailers should offer a large variety of reasonably priced products and a high quality of service.

Which area would you expect retailers to invest in, in order to improve your shopping experience? (cont.)

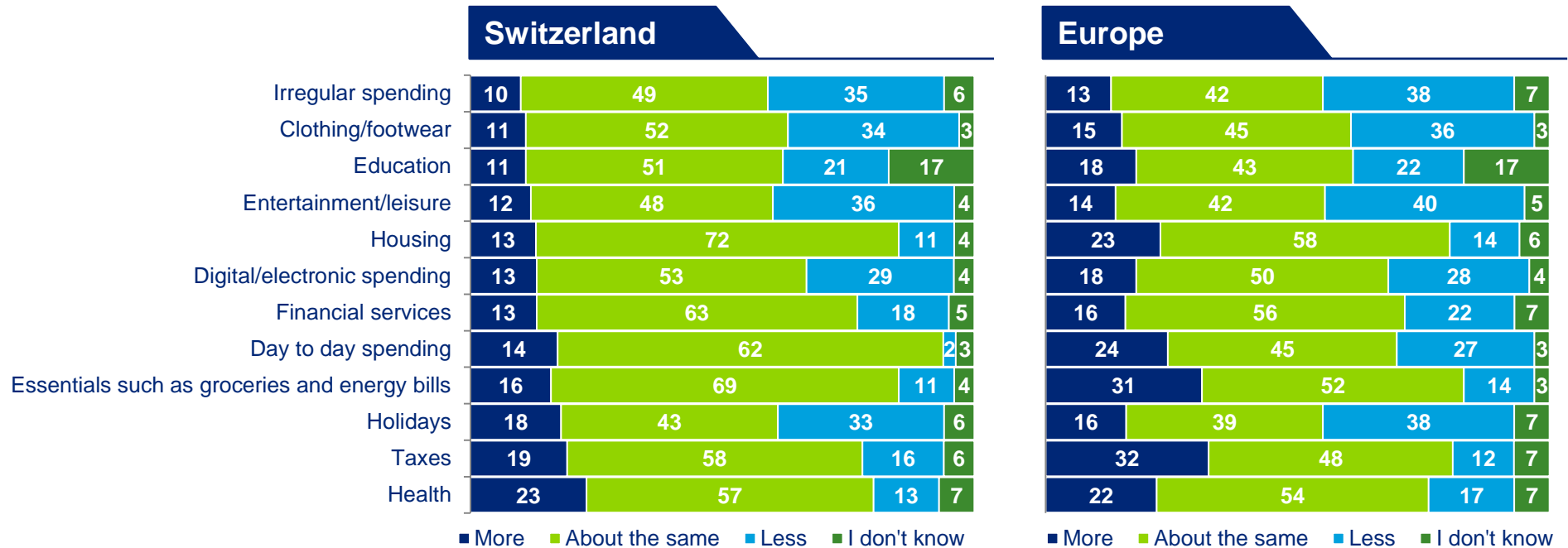
Figures in percentage



- Women and men agree on the most important investment, despite men wanting more investment in E-commerce, because they use it more. Women would appreciate more investment in customer relationship and home delivery.
- The older the consumer is, the more they appreciate advice.
- The ranking of top five consumer priorities for improvement of their shopping experience remains the same for each age group.

Thinking about what you spend your money on now versus a year ago..., are you spending less, the same or more on the following

Figures in percentage



• Europe:

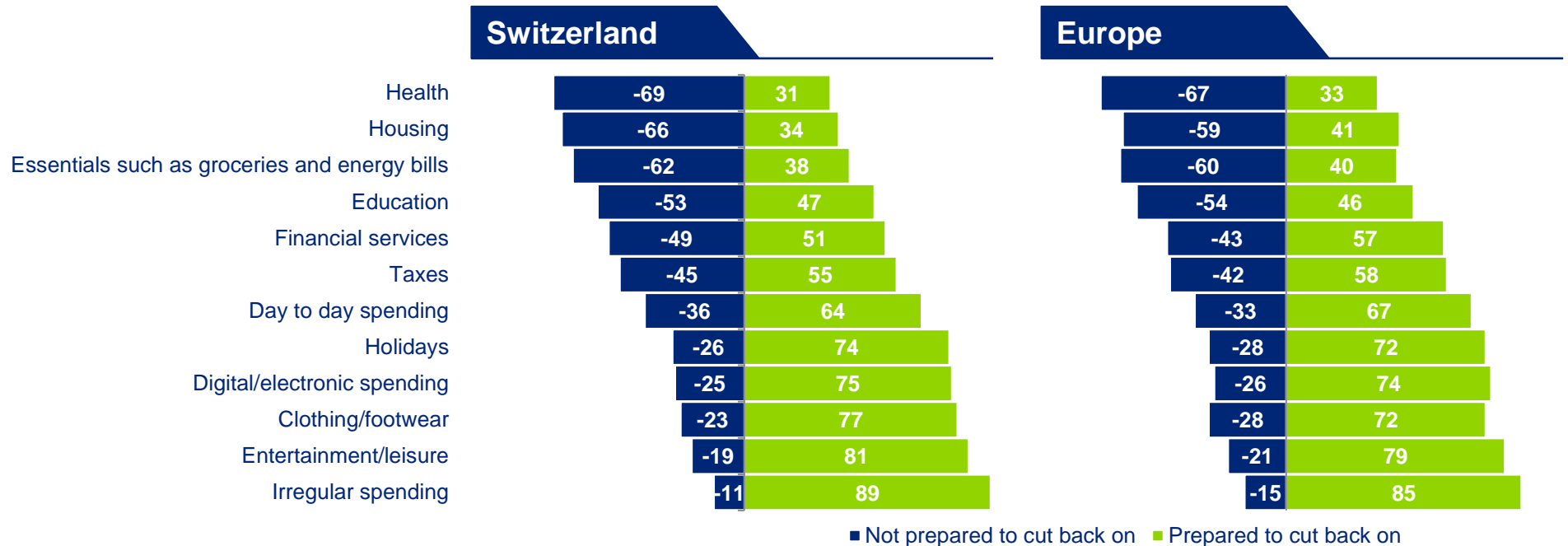
- In this period of generally higher taxes and rising commodity prices, the categories of spending which increased the most are those linked to primary needs.
- More discretionary spending is being cut once again by households.

• Switzerland:

- Although price sensitive, 23% of Swiss consumers spend more on health now than a year ago, 18% spend more on holidays.

In the future, if needed, which of the following areas would you be prepared to cut back spending on?

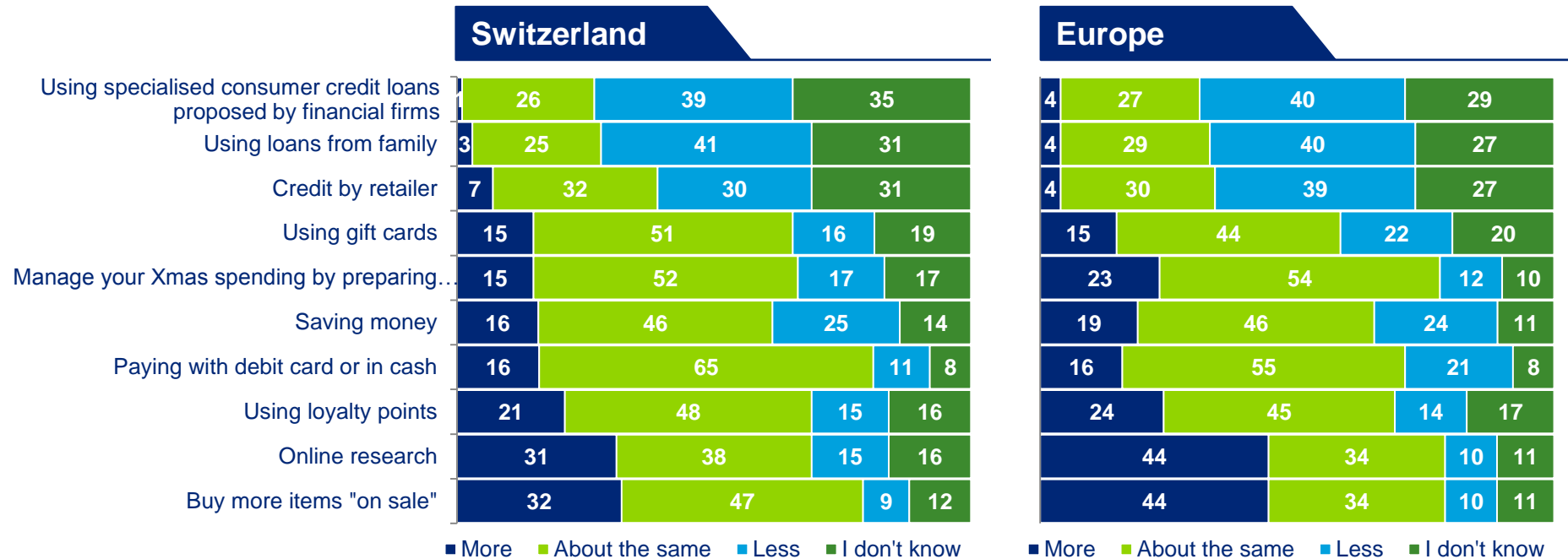
Figures in percentage



- Areas Swiss consumers would be prepared to cut back spending on correspond closely to the categories chosen by Europeans.
- Saving strategies involve decreasing spending on entertainment/leisure, clothing/footwear and digital/electronic equipment.
- The majority of Swiss consumers considered it important to keep spending on health, housing, food, energy and education on the same level even in times of economic uncertainty.

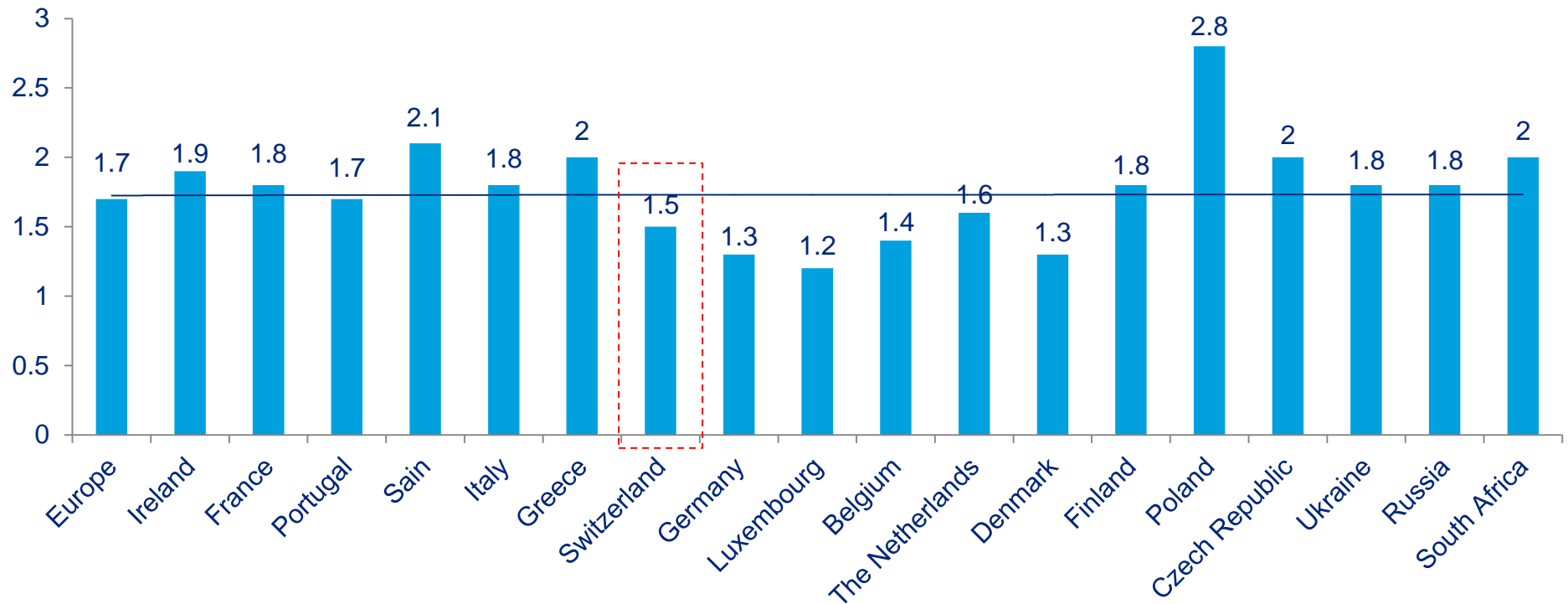
Thinking about your actual spend behaviour compared to a year ago, are you doing less, the same or more of the following?

Figures in percentage



- There were two new answering choices added compared to last year, and they monopolize the 1st places.
- The trend is still on track, globally consumers are more taking care of their budget, trying to use less expensive solutions.
- Consumers are getting smarter than last year, they choose the cheaper way to shop.

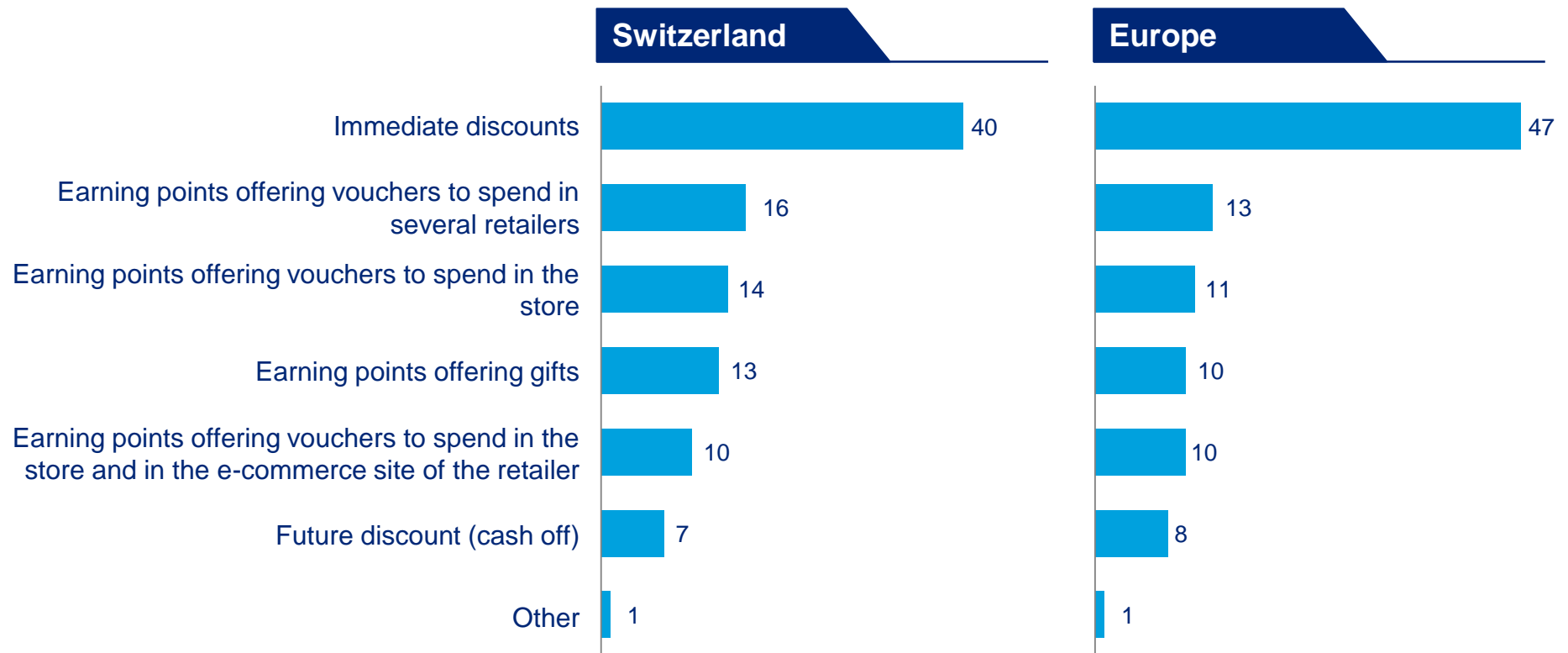
How influential are loyalty/reward programs in your decision making process?



- On a scale of 0-3 (0 meaning "not interested at all" and 3 indicating "very interested"), interest in loyalty programs in the countries surveyed averages 1.7.
- In Europe, countries strongly touched by crisis are more interested in loyalty programs.
- Switzerland, Germany, Luxembourg, Belgium and Denmark are less interested.

For each type of loyalty/reward programs, could you rank them by preference?

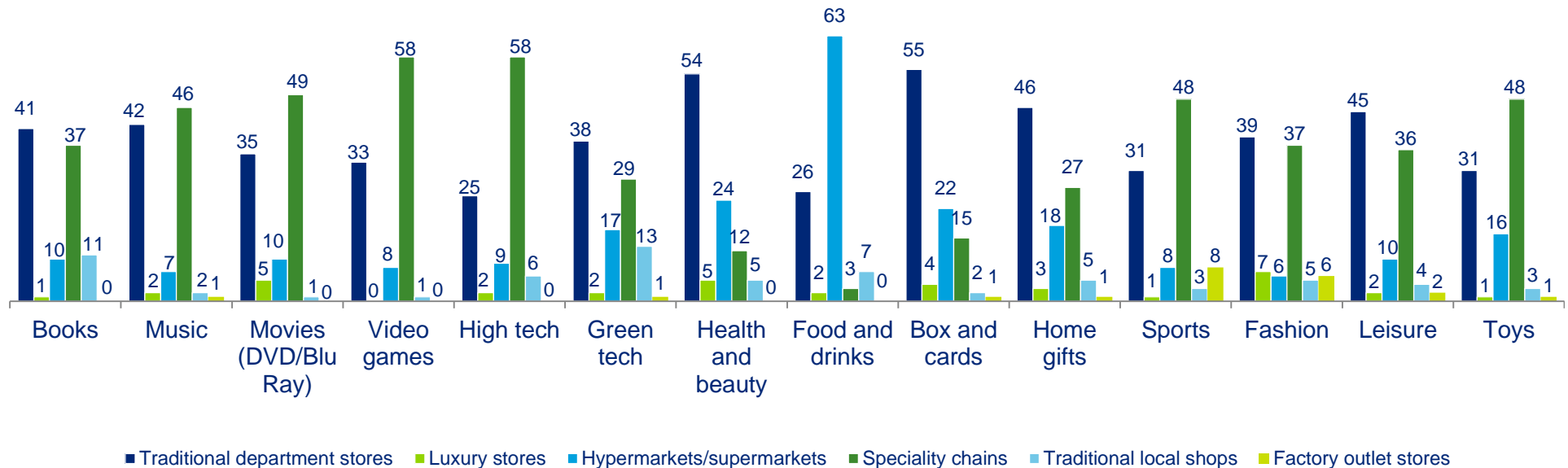
Figures in percentage



- As last year, immediate discounts remain overwhelmingly preferred: about 1 European out of 2 clearly chose immediate discounts.
- Earning points offering gifts came second last year but is only fourth in 2013. Germany is the only country where consumers continue to favour earning points for gift purchases over immediate discounts. All other countries favoured immediate discounts.

For the gifts you intend to buy in stores, where do you think you will buy these?

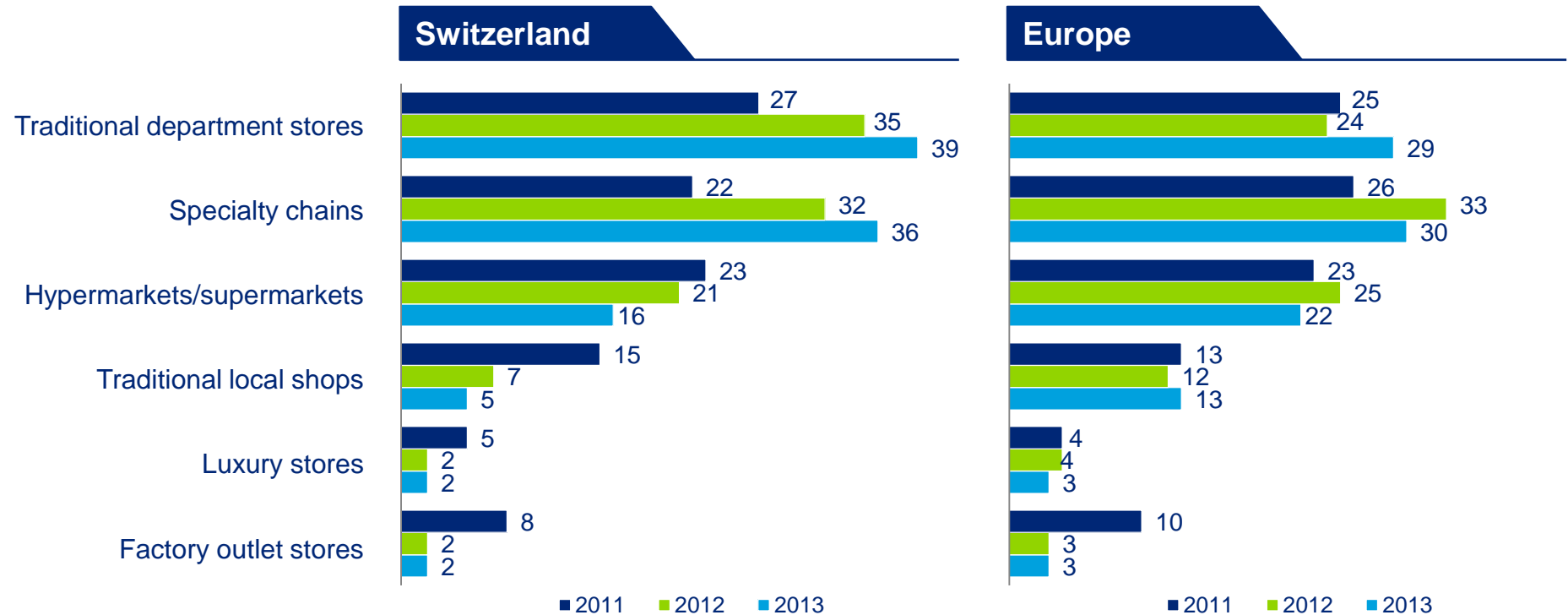
Figures in percentage



- In Switzerland, store choice depends on gift type.
- Hypermarkets/supermarkets are best for food purchasing in 2013.
- Speciality chains are preferred by Swiss consumers for high tech gifts, sports, toys and video games gifts.
- The traditional department store is favored for health & beauty, box & cards and home gifts.

For the gifts you intend to buy in stores, where do you think you will buy these? (cont.)

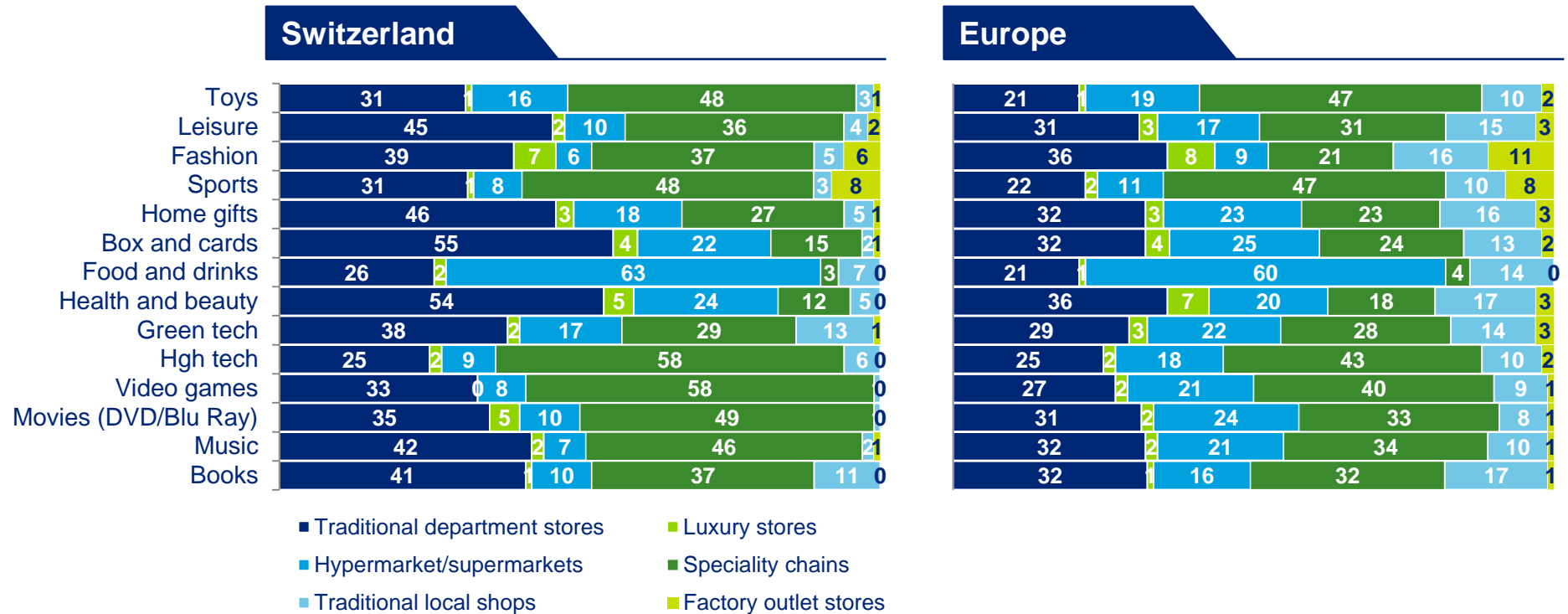
Figures in percentage



- Traditional department stores are the favourite shopping destination for Swiss consumers; although closely followed by speciality chains, while for the European countries only the order of preference is reversed.
- Traditional local shops are less popular in Switzerland compared to the European average. The Europeans mainly purchase health & beauty, books, fashion and home gifts in the traditional local shops.

For the gifts you intend to buy in stores, where do you think you will buy these? (cont.)

Figures in percentage

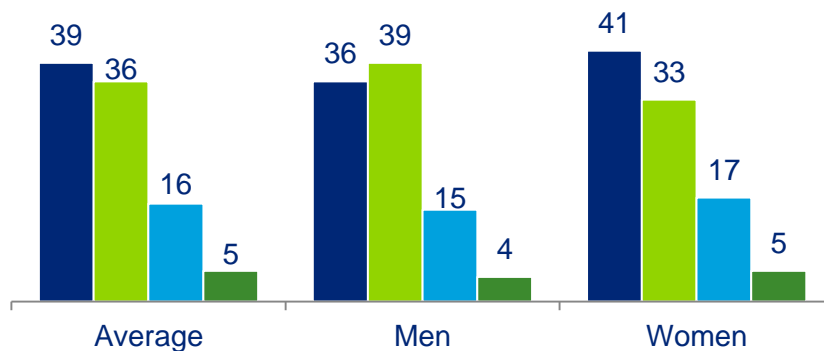


- Traditional department stores are number one choice for the purchase of health & beauty products (54% in Switzerland, 36% in Europe), home gifts (46% in Switzerland, 32% in Europe), and leisure gifts (45% in Switzerland, 31% in Europe).
- High-tech gifts, video games, movies, music, toys and sports gifts are mostly purchased in specialty chains — both in Europe and in Switzerland in particular.

For the gifts you intend to buy in stores, where do you think you will buy these?

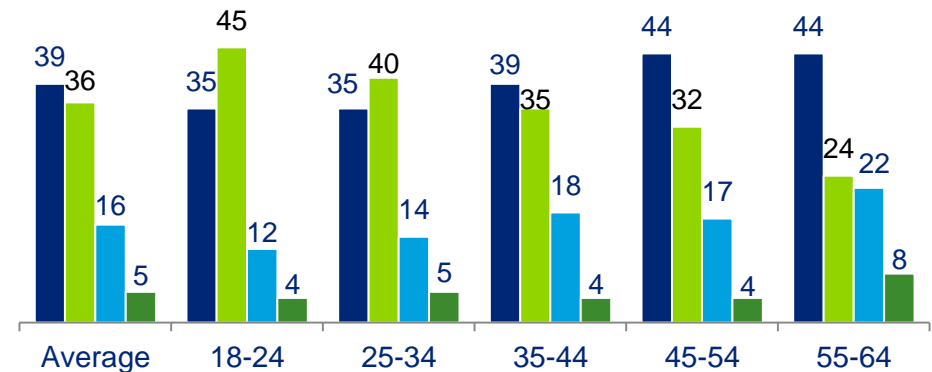
Figures in percentage

Gender



- Traditional department stores
- Speciality Stores
- Hypermarkets/Supermarkets
- Traditional local shops

Age



- Traditional department stores
- Speciality Stores
- Hypermarkets/Supermarkets
- Traditional local shops

- In Switzerland, women prefer traditional department stores, men prefer speciality chains.
- Age changes the attitude of Swiss consumers. Older people are less interested by speciality chains than younger generations, they prefer traditional department stores.

Digital influence

Shopping channels — how are Swiss consumers influenced by the digital shopping evolution

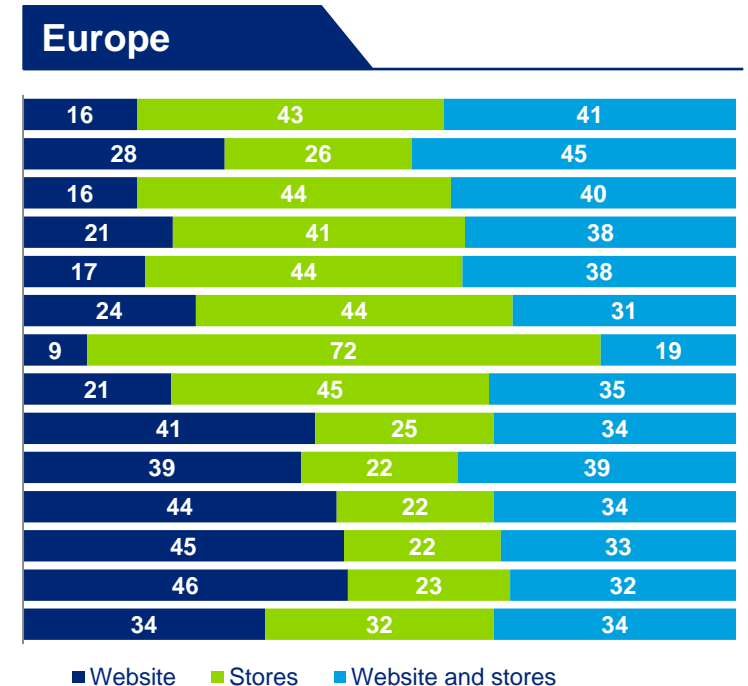
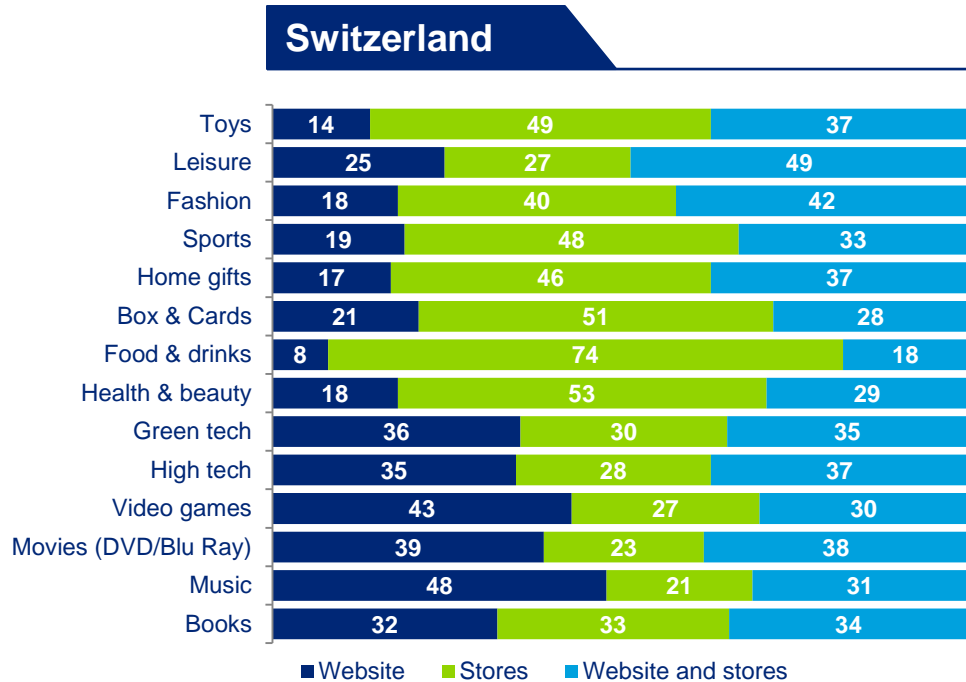
Figures in percentage



- The trend is clear — the share of planned online purchases increases steadily.
- Cross channel (using both online and stores to search and compare) is decreasing since 2011, but it is always on the top of the ranking for comparing products.

Where are you getting ideas and advice on the gifts categories below?

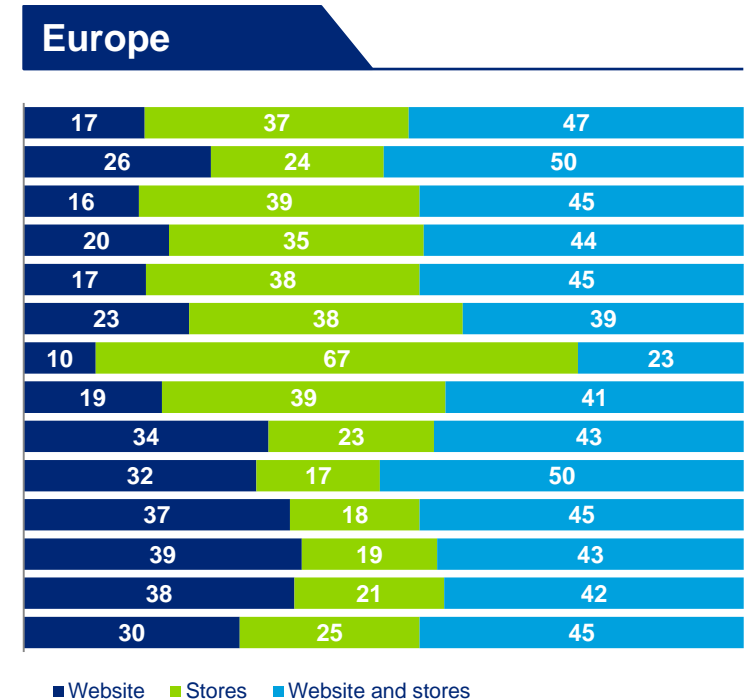
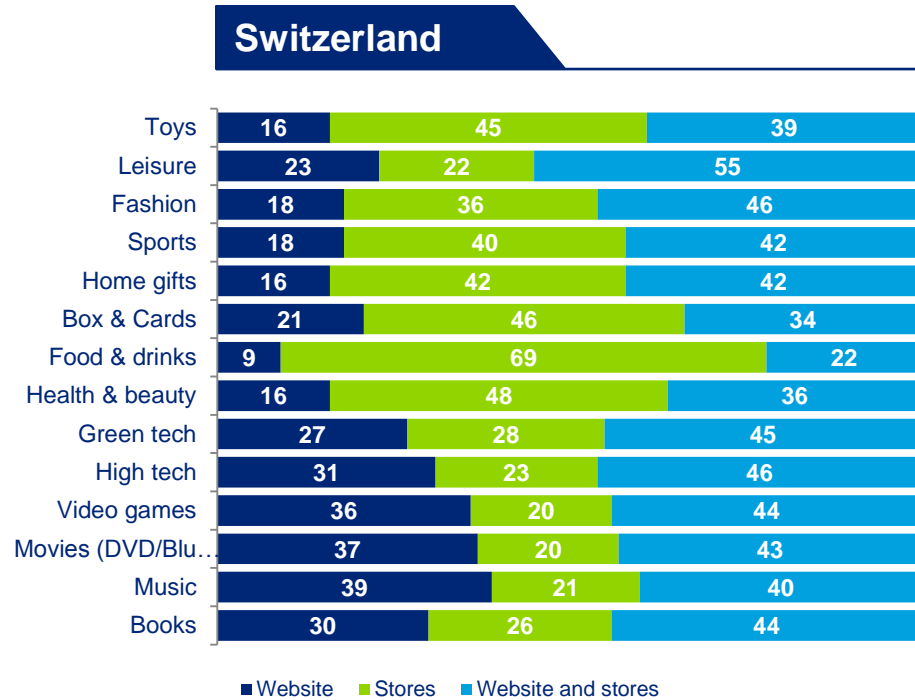
Figures in percentage



- The Internet stays an important medium to get ideas and advice on a broad range of products.
- There are only a few gift categories for which the majority of Swiss consumers like to get ideas and advice solely in «bricks and mortar» stores — food & drinks, health & beauty and box & cards.

Could you please state if you will be searching for products and comparing value online, in stores or both for the gifts categories below?

Figures in percentage

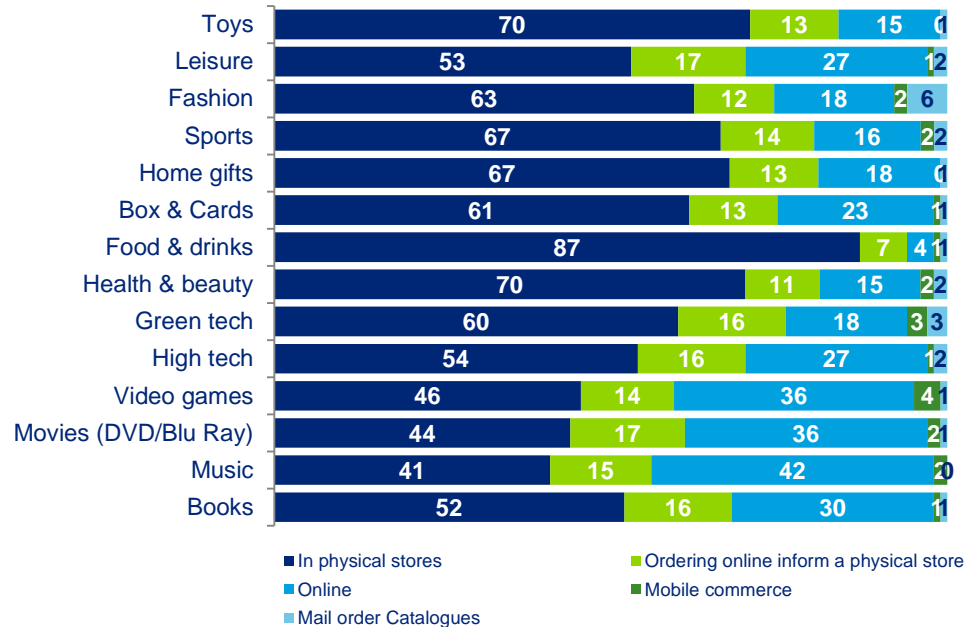


- Channels for products searching are similar to those for getting ideas and advice. The majority of gifts purchases are digitally influenced, the exception being food & drinks.
- Preferences of Swiss consumers do not differ significantly from those of average Europeans.

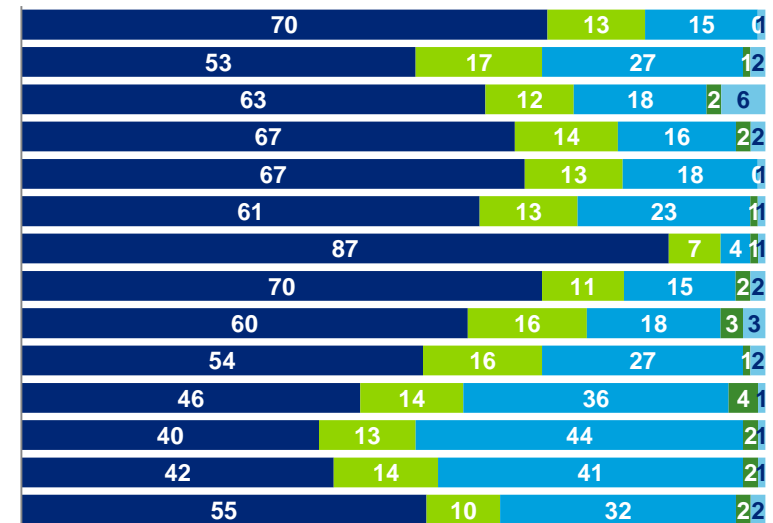
Where would you actually buy the specific gifts below?

Figures in percentage

Switzerland



Europe



- An interesting point arising from the survey is that Swiss silver shoppers (age 55+), do not fall behind the rest of the population when it comes to online shopping. In particular, they are keen on buying video games, movies, music and books online. By contrast, least likely to shop online is the youngest age group (age 18-24) included in our survey. Only 28% of their Christmas gifts will be bought online.

Which channel responds most adequately to your following shopping needs?

| E-commerce | 2013 | | 2012 | |
|---|------------------|-----|------------------|-----|
| Possibility to know the consumers opinion on products | 1 st | 67% | 2 nd | 66% |
| Shopping when I want | 2 nd | 66% | 1 st | 70% |
| Home delivery | 3 rd | 63% | 5 th | 59% |
| Prices can be compared easily | 4 th | 61% | 3 rd | 59% |
| Shopping costs little time | 5 th | 58% | 4 th | 59% |
| It's easy to search for and choose what I need | 6 th | 55% | 6 th | 57% |
| Products can be compared easily | 7 th | 55% | 8 th | 49% |
| Price level | 8 th | 51% | 9 th | 49% |
| Broad assortment | 9 th | 50% | 7 th | 51% |
| Information on availability of products | 10 th | 49% | 10 th | 48% |

| Stores | 2013 | | 2012 | |
|--|------------------|-----|------------------|-----|
| After sale services | 1 st | 87% | 1 st | 88% |
| Possibility to easily exchange or to return products | 2 nd | 85% | 3 rd | 83% |
| Safety in respect of payment | 3 rd | 85% | 4 th | 83% |
| Protection of my personal data | 4 th | 83% | - | - |
| Competent and professional advice | 5 th | 83% | 5 th | 83% |
| Pleasure while shopping | 6 th | 81% | 2 nd | 83% |
| Delivery times of products | 7 th | 70% | 7 th | 61% |
| Quality of product information | 8 th | 62% | 6 th | 64% |
| Information on availability of products | 9 th | 48% | 8 th | 49% |
| Broad assortment | 10 th | 47% | 11 th | 46% |

- E-commerce seduces Swiss consumers because:
 - It allows easy comparison: consumers opinion, prices and products comparison.
 - It is more practical: home delivery, no limitation with respect to opening hours, clarity of products presentation.
- On the other hand, stores are appreciated for after sales service, security of payment and of personal data, human relationship and the overall shopping experience.

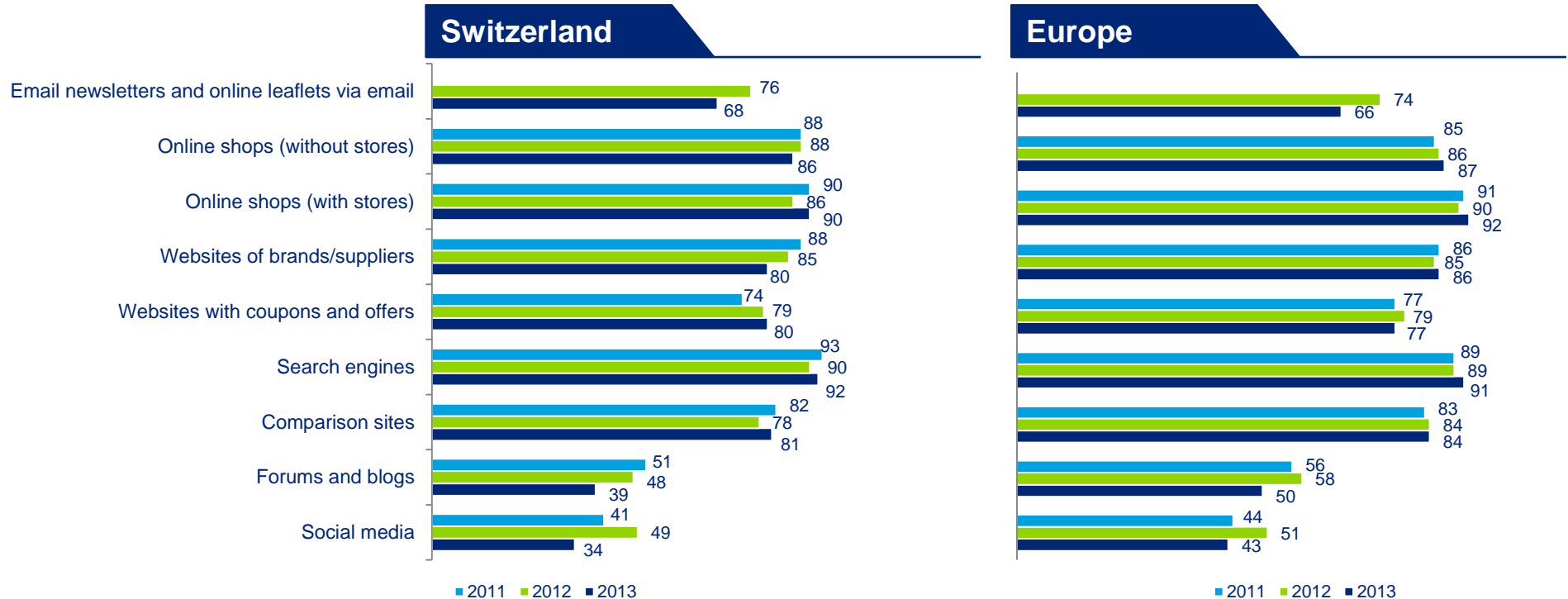
Which channel responds most adequately to your following shopping needs?

| M-commerce | 2013 | | 2012 | |
|---|------------------|----|------------------|----|
| Shopping when I want | 1 st | 5% | 3 rd | 4% |
| Shopping costs little time | 2 nd | 4% | 4 th | 4% |
| It's easy to search for and choose what I need | 3 rd | 4% | 8 th | 3% |
| Prices can be compared easily | 4 th | 4% | 6 th | 3% |
| Home delivery | 5 th | 4% | 2 nd | 4% |
| Possibility to know the consumers opinion on products | 6 th | 4% | 1 st | 5% |
| Broad assortment | 7 th | 3% | 10 th | 3% |
| Price level | 8 th | 3% | 16 th | 2% |
| Products can be compared easily | 9 th | 3% | 11 th | 3% |
| Protection of my personal data | 10 th | 3% | - | - |

- M-commerce, defined as “the use of mobile devices to conduct commercial transactions online”, principally allows consumers to shop when they want, with the other advantages being substantially the same as with E-commerce.

Going online — Please state for each option mentioned below if you will or will not be using the following items for searching products, for comparing only, or for both

Figures in percentage

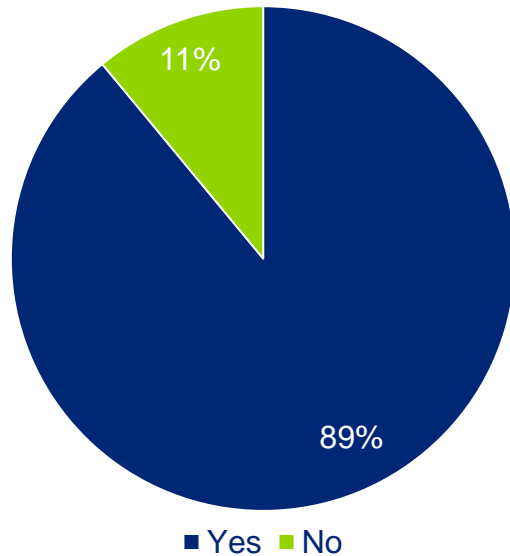


- Preferred choices for searching and comparing products are: online shops (with stores), search engines and in 3rd position online shops (without stores). The pattern remains unchanged since 2011.
- There was a fall between 2012 and 2013 for using social media, forums and blogs.
- Swiss use of social media is low compared to the rest of Europe.

You stated that you bought online gifts last year, were the online ordered gifts delivered on time last year (2012)? If yes: In which way does it affect your buying behavior this year?

Figures in percentage

Switzerland



Switzerland

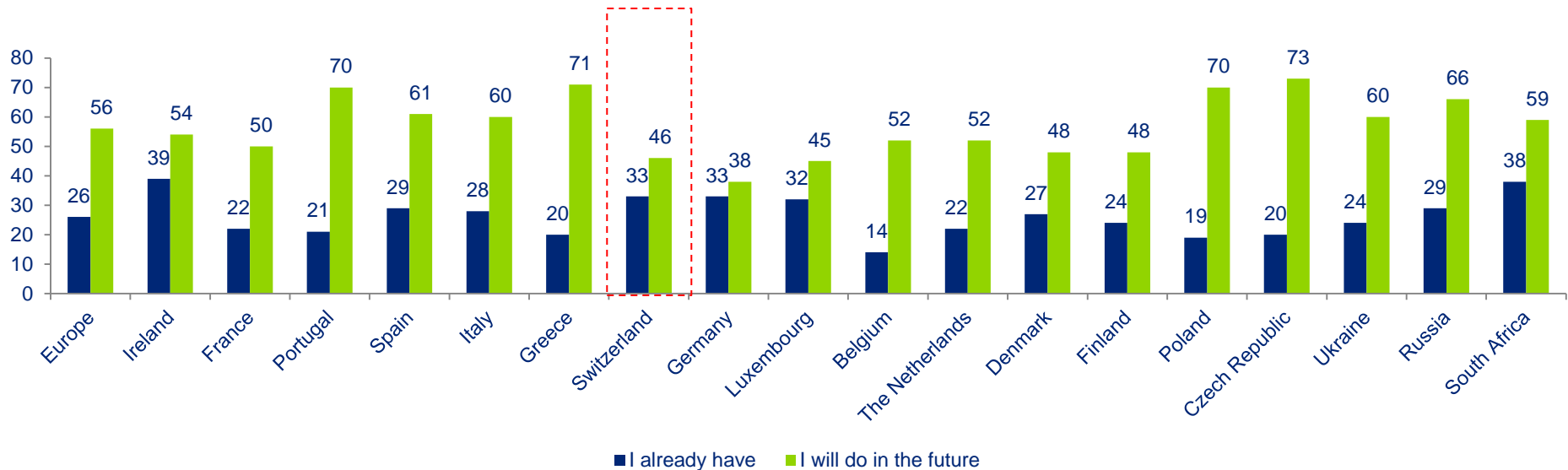


- One of potential inconveniences of online shopping is late delivery — experienced by 11% of Swiss consumers in 2012. 79% of them will still continue buying online, while they will also choose a different web shop (41%) or order earlier (16%).
- For comparison, 9% of European consumers experienced late delivery, 40% of whom will order earlier next time.

Have you ever used your smartphone / your tablet to buy a product and do you expect to use it in the future for buying products?

Figures in percentage

Europe

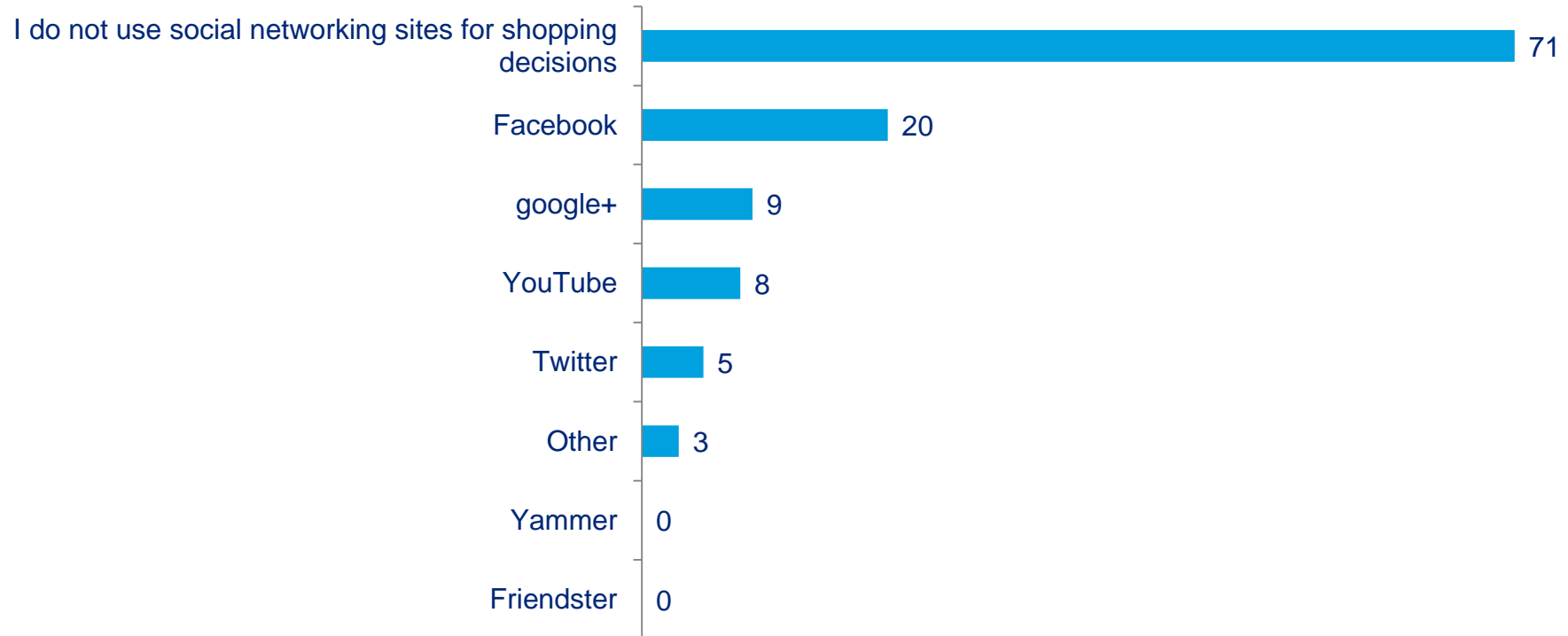


- At present, Ireland, South Africa, Switzerland and Germany are using M-commerce the most often.
- Although not having a high percentage of M-commerce users at the moment, Portugal, Greece, Poland and Czech Republic are among the most motivated to make purchases using smartphones and tablets in the future (> than 70%).
- Despite being one of the highest adopters of M-commerce for shopping, Swiss consumers had the lowest expected future adoption result amongst European consumers.

Which social networking sites do you use to help in making decisions about things that you are buying as presents at Christmas, or buying things for yourself?

Figures in percentage

Switzerland

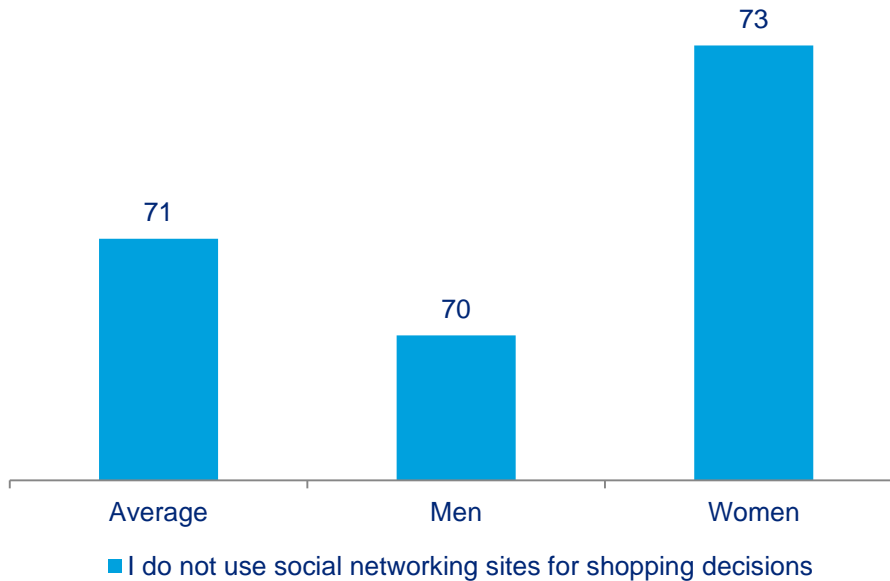


- Social networking sites have an influence on purchasing decisions of nearly one third of Swiss consumers.
- The most frequently consulted sites are Facebook, Google+ and YouTube.

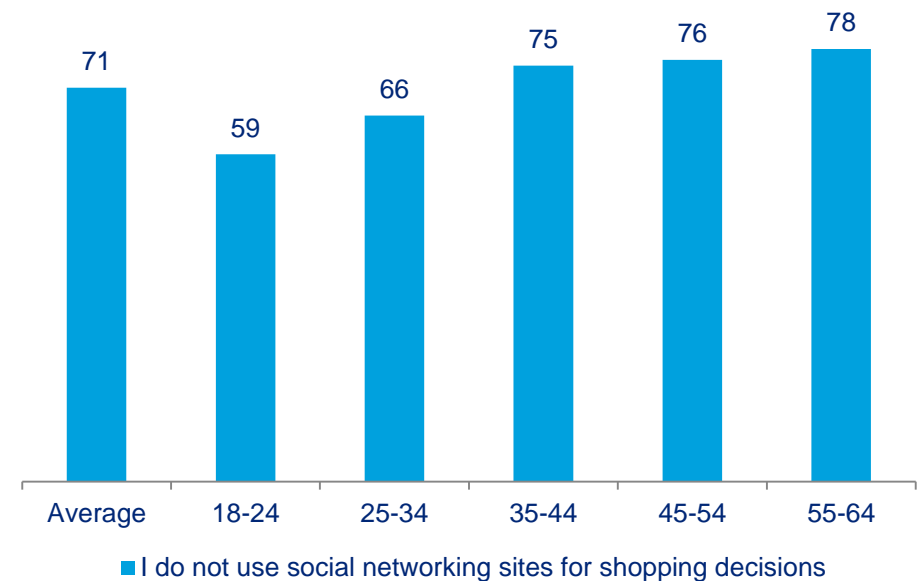
Which social networking sites do you use to help in making decisions about things that you are buying as presents at Christmas, or buying things for yourself?

Figures in percentage

Gender



Age

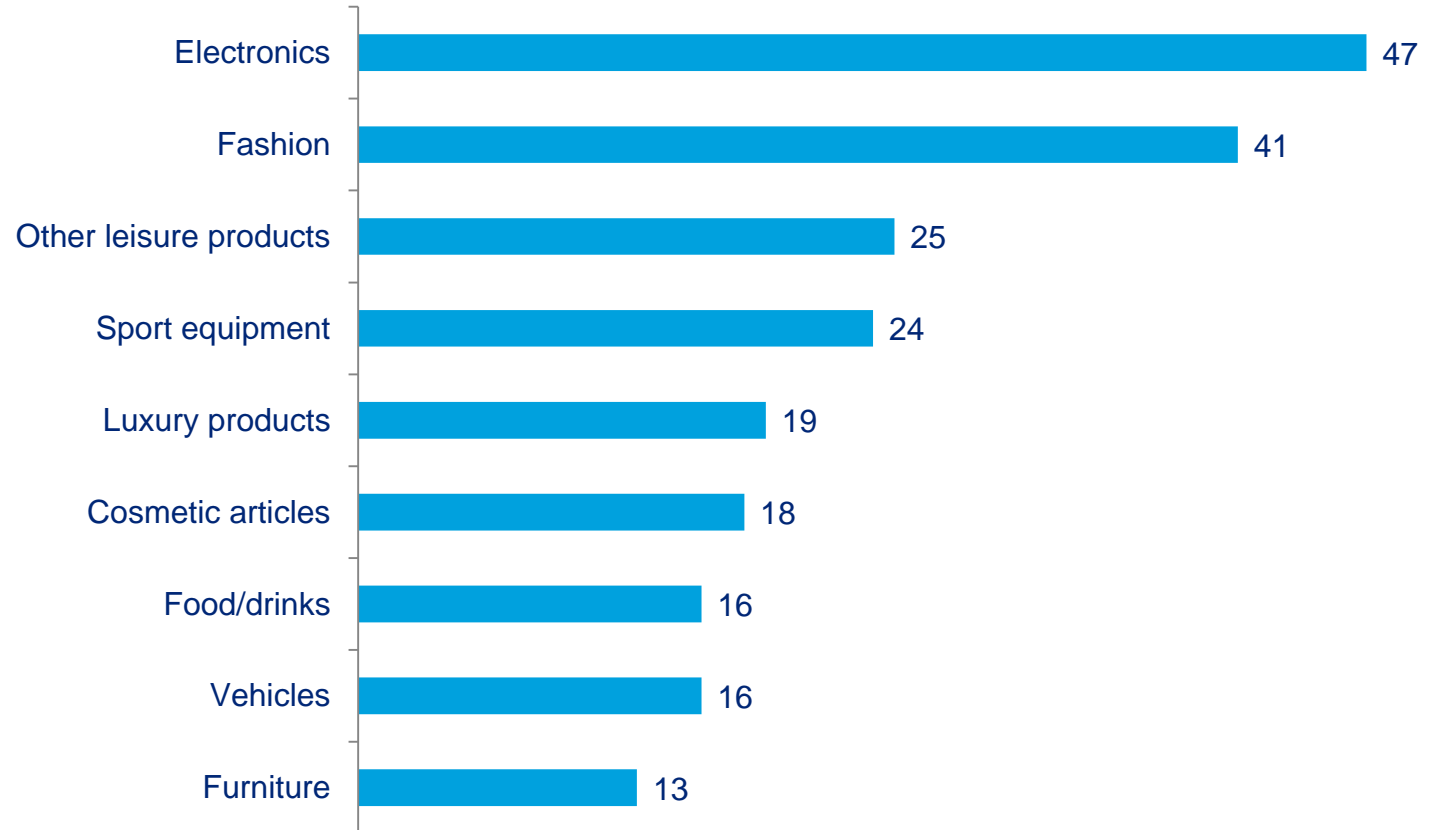


- Social networking sites have a higher influence on gift purchases of younger consumers.
- The older a consumer is, the less they appear to use social networking sites for shopping decisions.

For what kind of products do you use social networking sites to help decide what to buy?

Figures in percentage

Switzerland

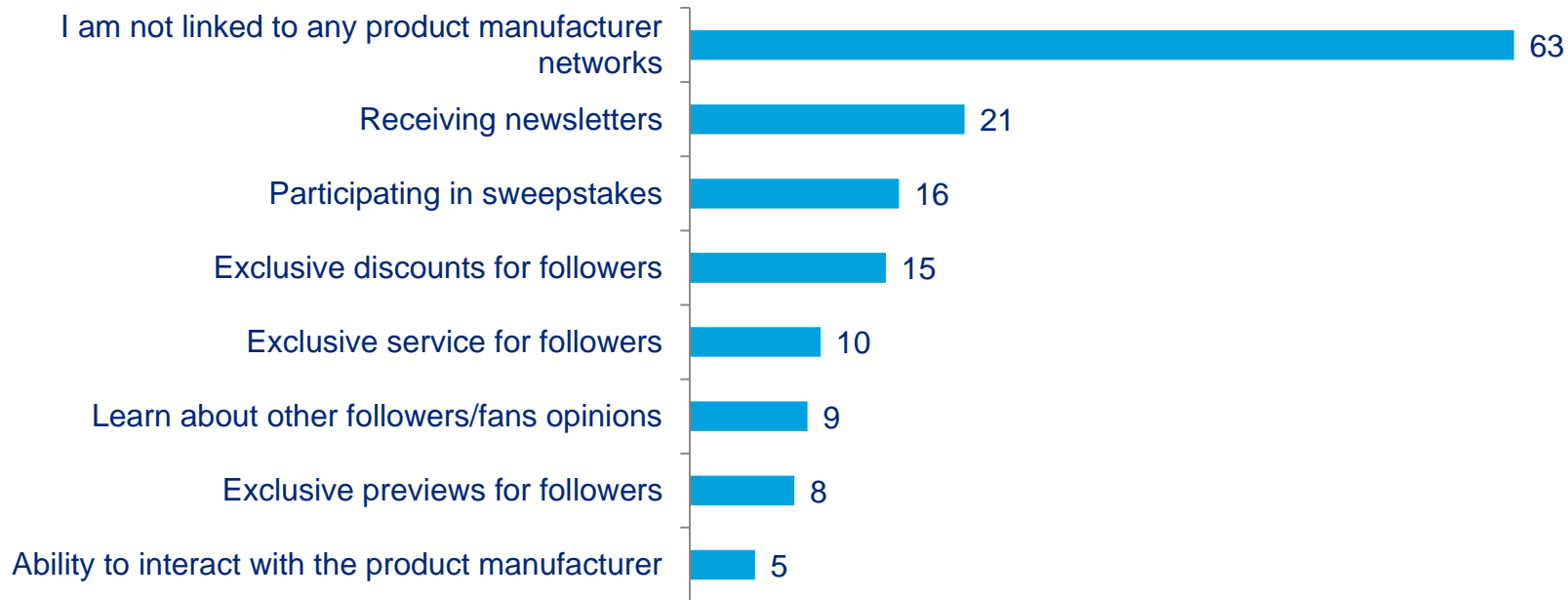


Swiss consumers use social networking sites to help them with purchasing decisions related notably to electronics, fashion and leisure products.

What do you value most from being linked to any product manufacturer specific forums on social networking sites?

Figures in percentage

Switzerland



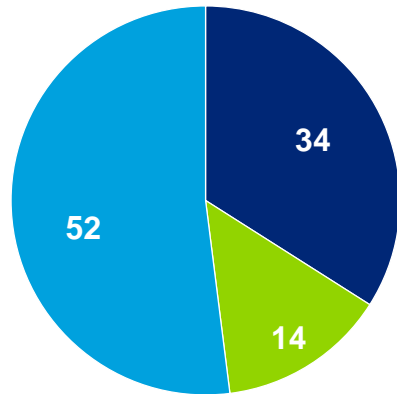
- Thirty-seven per cent of Swiss consumers are linked to product manufacturer specific forums on social networking sites.
- The survey shows that the manufacturers should invest in preparing newsletters, organizing sweepstakes and providing exclusive discounts for their followers on social networking sites, to attract and retain users.

Cross-border shopping

If you plan to make some of your Christmas purchases in Euros, will you:

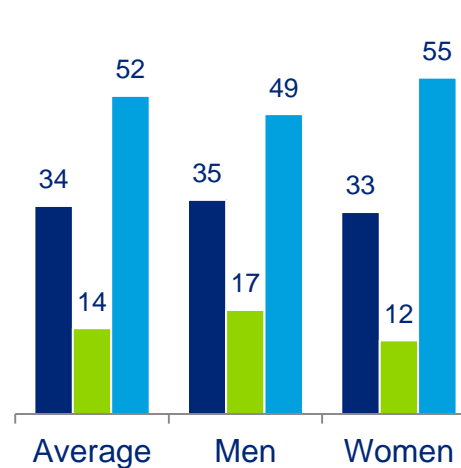
Figures in percentage

Switzerland



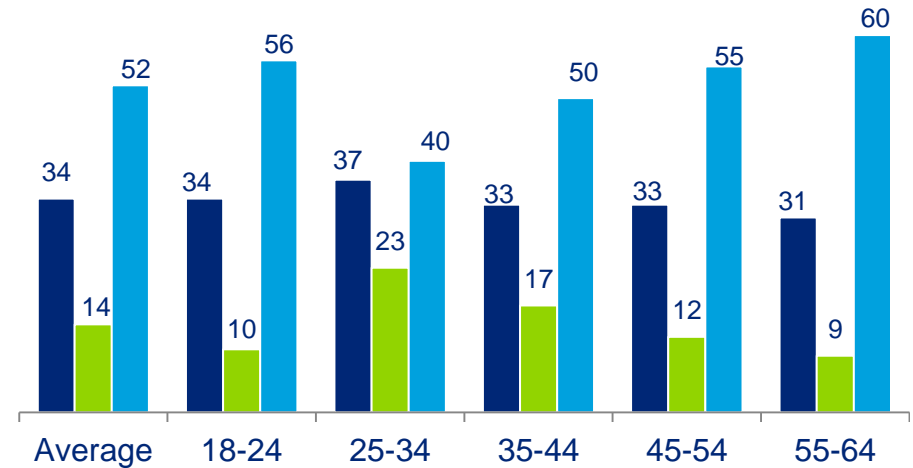
- Mainly do them directly in (neighbouring) EUR-countries
- Mainly do them on-line from European retailers
- I don't plan to make purchases in Euro

Gender



- Mainly do them directly in (neighbouring) EUR-countries
- Mainly do them on-line from European retailers
- I don't plan to make purchases in Euro

Age



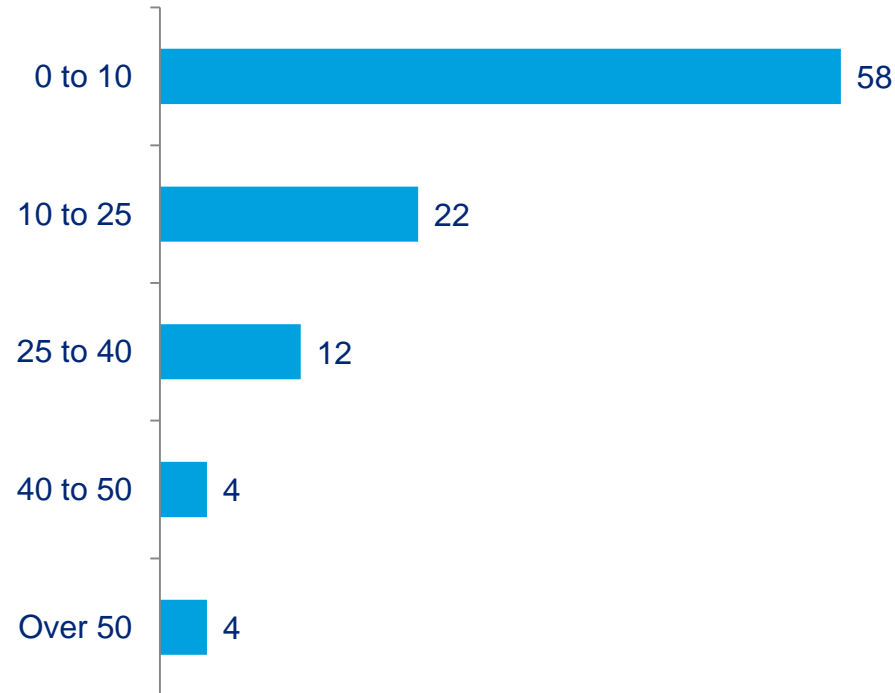
- Mainly do them directly in (neighbouring) EUR-countries
- Mainly do them on-line from European retailers
- I don't plan to make purchases in Euro

- Forty-eight per cent of Swiss consumers surveyed intend to make some of their Christmas purchases outside of Switzerland.
- Of these respondents, about two thirds make these purchases directly in neighbouring Eurozone countries and about one third will benefit through Internet purchases in the Eurozone.
- Differentiating the respondent's age, the younger generation (25 to 34 years) is more likely to make purchases in Euros.

How much as a proportion of your annual expenditure on consumer products at Christmas do you spend in Euros, as opposed to Swiss Francs?

Figures in percentage

Switzerland



- The average Swiss consumer intends to spend about 15% of their Christmas budget in Euros.
- Only about 20% of the consumers intend to spend 25% or more of their budget for Christmas shopping in Euros.

What are your reasons for doing Christmas related shopping in the EU?

Figures in percentage

Switzerland



- Forty-seven per cent of Swiss consumers who are doing Christmas related shopping in the EU, name lower prices as the main reason.
- Higher product diversity (12%) and special shopping experience (4%) are also reasons for Christmas shopping outside Switzerland.

Gift satisfaction on the decline

What types of presents would you most like to receive?

| Top 10 (1-10) Average | 2013 | 2012 |
|-------------------------------------|------------------|------|
| Money (cash) | 1 st | 57% |
| Books | 2 nd | 42% |
| Travel | 3 rd | 41% |
| Restaurants | 4 th | 34% |
| Gift vouchers | 5 th | 32% |
| Tickets | 6 th | 27% |
| Laptop/PC computer | 7 th | 26% |
| Beauty care, massage, spa treatment | 8 th | 25% |
| Gift cards | 9 th | 25% |
| Jewellery/watch | 10 th | 24% |

| First choice | 2013 | 2012 |
|------------------------|--------------|--------------|
| Ireland | Books | Books |
| France | Money (cash) | Money (cash) |
| Portugal | Money (cash) | Money (cash) |
| Spain | Money (cash) | Money (cash) |
| Italy | Money (cash) | Money (cash) |
| Greece | Money (cash) | Money (cash) |
| Switzerland | Money (cash) | Money (cash) |
| Germany | Money (cash) | Money (cash) |
| Luxembourg | Books | Money (cash) |
| Belgium | Money (cash) | Money (cash) |
| The Netherlands | Money (cash) | Books |
| Denmark | Money (cash) | Money (cash) |
| Finland | Money (cash) | Money (cash) |
| Poland | Money (cash) | Books |
| Czech Republic | Money (cash) | Money (cash) |
| Ukraine | Money (cash) | Money (cash) |
| Russia | Money (cash) | Money (cash) |
| South Africa | Chocolates | Money (cash) |
| Ireland | Books | Books |

- Money (cash), books and travel confirmed once again in the top 3 gifts desired.
 - Books have fallen 10% since 2011 and moved down in the rankings 4th in: Spain, Greece, Netherlands and Poland.
 - The smartphone shows a dynamic trend this year: with 27% of respondents eager to receive one for Christmas, it becomes the 6th more desired gift in Europe. On the other side, the tablet computer remains stable, desired by 24% of respondents. Those high value gifts show a shift between the different countries of the survey with demand from southern European countries (i.e. Portugal, Italy, Spain and Greece), Ukrainians and Russians at 10% above the European average.
 - The desirability of travel gifts is highest in: Spain, Italy, Greece, Switzerland, Ukraine and Russia.

What types of presents would you most like to receive?

| Top 10 (1-10) Men | 2013 | 2012 |
|--------------------|------|------|
| Money (cash) | 50% | 50% |
| Travel | 33% | 34% |
| Books | 32% | 39% |
| Laptop/PC computer | 30% | 30% |
| Restaurants | 27% | 27% |
| Gift vouchers | 26% | 22% |
| Smartphone | 25% | 22% |
| DVD/blu ray | 23% | 23% |
| Tablets | 21% | 21% |
| CDs | 20% | 23% |

| Top 10 (1-10) Women | 2013 | 2012 |
|-------------------------------------|------|------|
| Money (cash) | 63% | 58% |
| Books | 51% | 47% |
| Travel | 48% | 47% |
| Beauty care, massage, spa treatment | 43% | 42% |
| Restaurants | 40% | 41% |
| Gift vouchers | 38% | 36% |
| Tickets | 35% | 33% |
| Cosmetics/perfumes | 34% | 39% |
| Gift cards | 34% | 31% |
| Clothes/shoes | 33% | 33% |

- Since 2012, there has been little change in the preference profile of men and women for Christmas presents in Switzerland as well as in the other European countries.
- Both men and women are likely to prefer cash as their Christmas present.
- Travel and books are the second and third most desired Christmas presents.

Which of the following types of presents do you think you will buy for your friends and family this year (apart from children and teenagers)?

| Top 10 (1-10) Average | 2013 | | 2012 | |
|-------------------------------------|------------------|-----|------------------|-----|
| Books | 1 st | 37% | 1 st | 40% |
| Chocolates | 2 nd | 28% | 2 nd | 28% |
| Cosmetics/perfumes | 3 rd | 24% | 3 rd | 24% |
| Gift vouchers | 4 th | 22% | 4 th | 22% |
| Beauty care, massage, spa treatment | 5 th | 20% | 8 th | 19% |
| Restaurants | 6 th | 19% | 9 th | 18% |
| Money (cash) | 7 th | 19% | 5 th | 21% |
| Jewellery/watch | 8 th | 18% | 6 th | 20% |
| Gift cards | 9 th | 17% | 10 th | 18% |
| CDs | 10 th | 17% | 7 th | 19% |

| First choice | 2013 | 2012 |
|------------------------|--------------------|--------------------|
| Ireland | Books | Books |
| France | Books | Books |
| Portugal | Books | Books |
| Spain | Clothes/shoes | Clothes/shoes |
| Italy | Books | Books |
| Greece | Books | Books |
| Switzerland | Books | Books |
| Germany | Books | Books |
| Luxembourg | Books | Books |
| Belgium | Gift vouchers | Gift vouchers |
| The Netherlands | Books | Books |
| Denmark | Books | Books |
| Finland | Books | Books |
| Poland | Cosmetics/perfumes | Books |
| Czech Republic | Cosmetics/perfumes | Books |
| Ukraine | Chocolates | Cosmetics/perfumes |
| Russia | Cosmetics/perfumes | Cosmetics/perfumes |
| South Africa | Chocolates | Chocolates |

- The book confirms its status as the preferred gift choice for Christmas, above cosmetics and chocolates
 - Among the 18 countries in the survey, book are the preferred gift in 11 countries and the second in 5 others.
 - Cosmetics and perfumes are the only gifts of the top 10 that Europeans are more willing to buy than last year. They have become the preferred choice gifts in Poland and Czech Republic.
 - For the first time since 2010, gift vouchers overtake money in the table and the trend is consistent among men and women and across all generations.
 - Preference to gift CD decreased by 4%, reflecting the increasing shift to digital music buying.
 - Six gifts among the Top 10 planned gift ideas fall in the Top 10 list of offered gifts. Smartphones and tablets are the main difference between gifts planned / purchased along with travel and tickets.

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About the survey

- This survey about consumer shopping behaviour during the Christmas season was undertaken by Deloitte in 18 European countries and South Africa.
- A total of 17,354 consumers were surveyed, including 779 from Switzerland.
- The survey was conducted during the second and third week of September 2013. Information was collected via the Internet, with a structured questionnaire for a sample of individuals, within controlled panels. Respondents were between 18 and 65 years old.
- Each consumer in the panel is identified through the following aspects:
 - Socio-demographics;
 - Personal interests;
 - Consumer behaviour.
- To adjust the Internet sample to the population of each country, we used ex-post statistical weighting. The weighting is based on gender and age in each country.



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