



# Deloitte Holiday Retail Survey: New Year Shopping of Ukrainians during the War

**November 2022**



# Table of Contents

Opening remarks	3
Methodology	4
Key findings	6
Plans for holiday shopping	7
Types and amount of spending	8
Where and for whom Ukrainians are going to purchase gifts	9
Shopping format	10
Factors that affect decision making	11
Contact details	12

## OPENING REMARKS



**Oleksandr Yampolskyi**  
Director, Head of Retail &  
Wholesale Distribution  
Industry Group, Deloitte  
Ukraine

2022 Deloitte holiday retail survey



For 37 years now, Deloitte has been running an annual Holiday survey to provide insights into the U.S. consumer sentiment during the New Year's and Christmas shopping. Even though the survey is conducted in the U.S. market, its findings have allowed the Ukrainian retailers to monitor global trends and implement the most significant ones in their activities. Please use the QR code below to learn about the 2022 Survey.

However, the situation is completely different for the year 2022 for Ukraine. Global trends have been poorly reflected by the war-weakened economy. Therefore, we have decided to expand the survey by analyzing the sentiment of domestic consumers. Our task was quite unusual : to learn about the shopper's plans and expectations regarding New Year and Christmas in the time of war.

It is important for us that Ukrainian businesses get an accurate picture of consumer sentiment and can use our findings to determine their potential areas for growth.

We have interviewed Ukrainians within a representative sample, in order to understand the following:

- What share of Ukrainians are planning on doing the New Year's and Christmas shopping this year;
- What are the budgets for holiday shopping in Ukraine;
- What, where, and for whom Ukrainians are planning to purchase;
- What percentages of budgets intended for holiday purchases Ukrainians are prepared to spend on helping the army and those who suffered from the war;
- What factors will impact decision-making with respect to New Year's purchases the most.

We believe that this winter, despite all the challenges, the New Year's holiday spirit will enter every home, soon to be followed by a greater celebration: the Day of Ukraine's Victory over Russia. We believe that, while the Armed Forces of Ukraine are fighting for our homeland in the battlefield, Ukrainian businesses and each Ukrainian will not stop working to support the economy, thus bringing this day closer every hour.

### Survey Objective

Study the sentiment of Ukrainian consumers in the period of New Year's and Christmas shopping, and its specific features during the war.

### Target Audience

Residents of Ukraine older than 18 years, who use Internet (caused by the method of data collection).

### Survey Task

Identify specific features of consumer sentiment during preparation for New Year's and Christmas holidays under the conditions of war, including:

- Average budget of Ukrainians for holiday shopping in 2022;
- Most popular product categories;
- Preferences of Ukrainians regarding shopping formats;
- The impact of various factors on making a purchase decision.

### Method of Data Collection

To perform the above tasks, we have used a quantitative method of data collection – online interviews based on a quota sample that corresponds to the social and demographic portrait of the Ukrainian people.

### Survey Sample

A multi-stage stratified sample representing the population of Ukraine by sex, age, size of settlements, and employment categories (more than 1,000 respondents).

### Breakdown by Employment Categories

For the purpose of this survey, we have allocated the respondents to the following social groups by employment categories:

- Pensioners
- Students
- Temporarily unemployed
- Stay-at-home parents, individuals on maternity/paternity leave
- Employees of governmental institutions
- Employees of commercial organizations
- Employees of non-profit organizations
- Business owners
- Freelancers
- Persons serving in the army, internal affairs bodies, etc.

### Breakdown by Size of Settlements

Large cities (with over 1 million residents)

Medium cities (from 100 thousand to 1 million residents)

Small cities (with less than 100 thousand residents)

For the convenience of processing and presenting the results, we have allocated the respondents into six groups based on geography:

#### City of Kyiv and Kyiv Region;

**Center:** Poltava, Dnipro, Cherkasy, Vinnytsia, and Kirovohrad Regions;

**South:** Mykolaiv, Odesa, Kherson, and Zaporizhzhia Regions (except temporarily occupied territories and the Autonomous Republic of Crimea);

**North:** Chernihiv, Zhytomyr, and Sumy Regions;

**West:** Lviv, Chernivtsy, Khmelnytskyi, Ternopil, Zakarpattia, Ivano-Frankivsk, Volyn, and Rivne Regions;

**East:** Kharkiv, Donetsk, and Luhansk Regions (except temporarily occupied territories);

Ukrainians who are temporarily staying **abroad**.

### Survey Limitations

The survey results are based solely on the interviews of respondents, and not on the actual data of the business entities engaged in wholesale and retail trade.

E.g., the average budget or the purchasing intensity in a specific format (supermarket, department store, etc.), based on our survey results, may differ from similar indicators derived from the data of cash registers in the companies of the sector under review. This may be related to the fact that the respondents answered the questions based on their own perceptions and assumptions at the time of the survey, and could not consider, for instance, minor or spontaneous purchases that would significantly affect the actual budget.

## KEY FINDINGS

### Spend

**52% respondents plan to purchase less** than in 2021.

**Budgets of 49% Ukrainians** for New Year's and Christmas shopping are within a range of **1 to 5 thousand UAH**.

**51%** Ukrainian plan to give up to 50% of their New Year's and Christmas shopping budgets to charity and donations to the Armed Forces of Ukraine.

**52%** are ready to spend **from 25% to 50%** of their monthly income on New Year's and Christmas shopping.

Residents of Kyiv and Kyiv Region, as well as Ukrainians temporarily staying abroad are **prepared to spend the most**.

### Categories

**The most popular retail categories** are food and beverages, including sweets, children's products, clothing and footwear, and alcoholic drinks.

**Donations to the Armed Forces of Ukraine**, are ahead of alcoholic beverages in terms of popularity – **33%** respondents plan on helping the army.

**83%** Ukrainians will, in the first hand, purchase **gifts for the family**.

**63%** respondents are not going to purchase products if the manufacturer/seller has not left the market of the aggressor state.

### Timing

**Almost half** of the Ukrainians will start their New Year's and Christmas shopping after **December 15th**.

**33%** plan to make purchases in **the first half of December**.

**20%** plan to go **shopping on Black Friday**, 42% have not decided yet.

Black Friday is mostly popular with the **youth** (18–27 years of age), **students**, and **freelancers**.

### Formats

**45%** respondents prefer in-store shopping.

**In-store shopping** will mostly be done in large network food stores and supermarkets, whereas the Ukrainian Internet stores will be the spot for shopping online.

Ukrainians are mostly **unwilling to wait for delivery from foreign Internet stores**, even if the latter offer much lower prices than in Ukraine.

**66%** use smartphones for making online purchases.

## Plans for Holiday Shopping

**Despite the war, 61% Ukrainians will not give up on the New Year's and Christmas shopping**

# 52%

**Ukrainians are ready to spend from 25% to 50% of their monthly income on holiday shopping.**

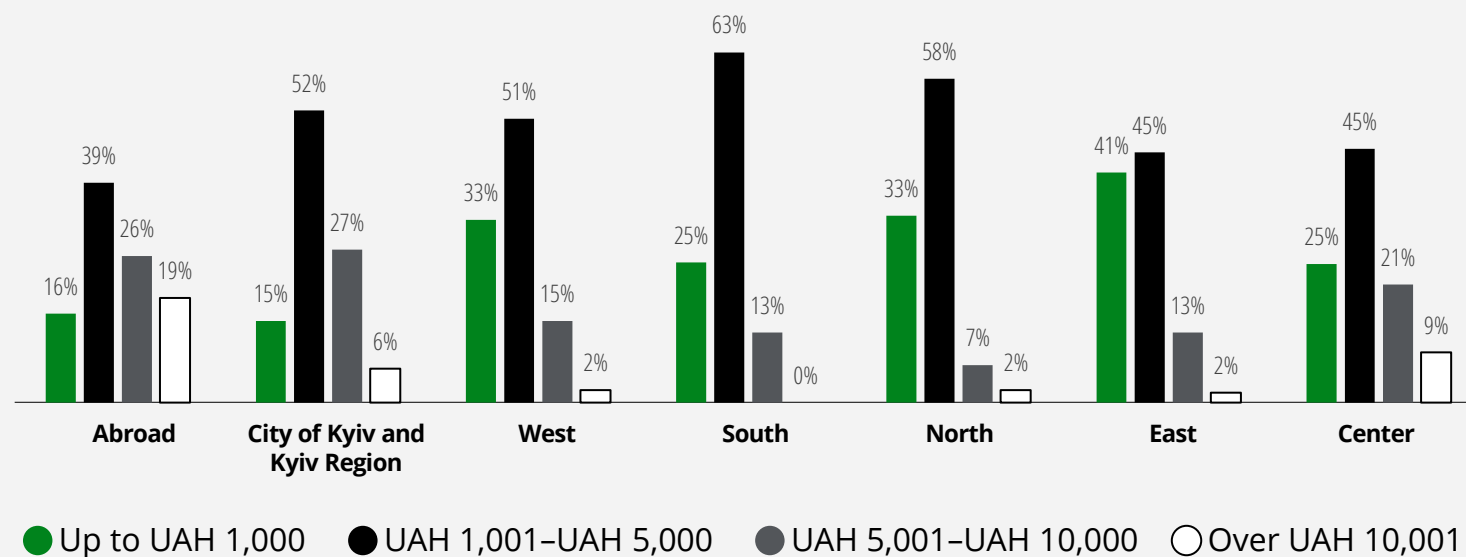
40% are ready to spend up to 25% of their monthly income, and 8% – more than 50%. 14% are prepared to take out a loan for the holiday shopping.

The highest percentage (19%) of those who are ready to spend more than UAH 10 thousand for New Year and Christmas shopping is among Ukrainians who temporarily stay abroad.

Shopping is planned by:

	Females	Males
On New Year and Christmas	62%	59%
On Black Friday	20%	19%

Budgets for New Year's and Christmas shopping:



# Types and Amount of Spending

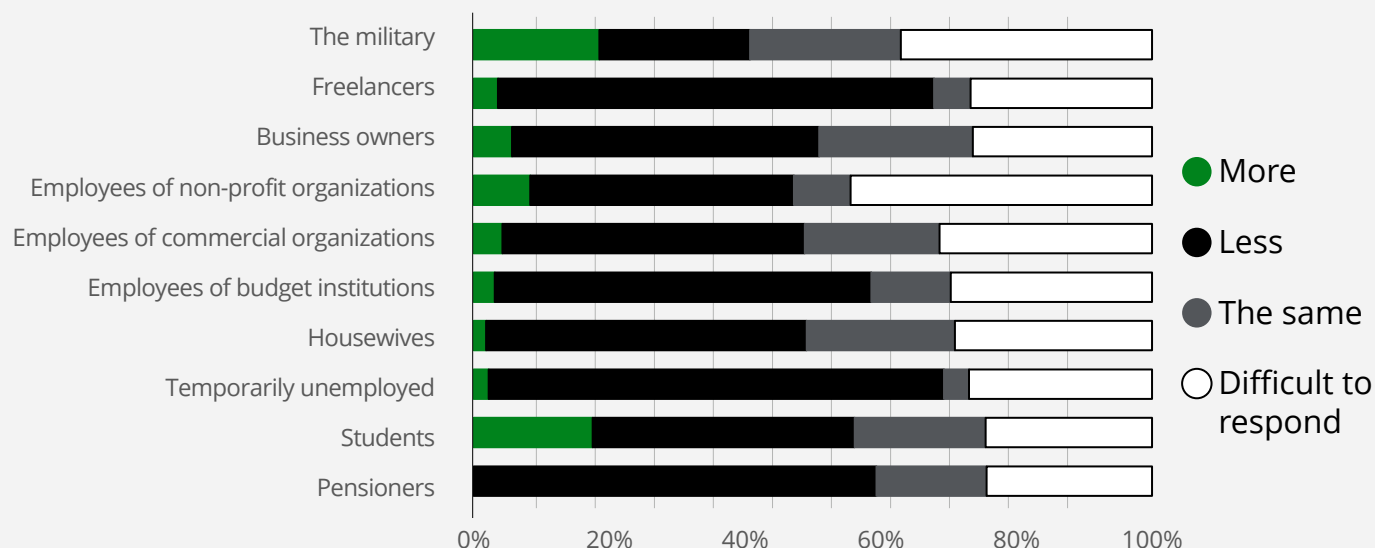
**52%**  
Ukrainians plan to purchase less goods than in the previous year

## The most popular retail categories:

Food and beverages (including sweets)	81%
Children's products	46%
Clothing and footwear	42%
Donation to the AFU	33%
Alcoholic drinks	32%

**61%** Ukrainians plan to spend at least part of their holiday budgets to help the AFU and the civilians who suffered from the war

How many goods do you plan to purchase during New Year's and Christmas shopping, compared to the previous year?



Percentage of Ukrainians who plan to donate charity funds to:

	Assist the civilians who suffered from the war	Purchase of medical supplies and equipment	The needs of Ukrainian defenders in the front line	Other option
<b>Respondents in Ukraine</b>	15%	16%	54%	2%
<b>Respondents abroad</b>	23%	15%	37%	3%

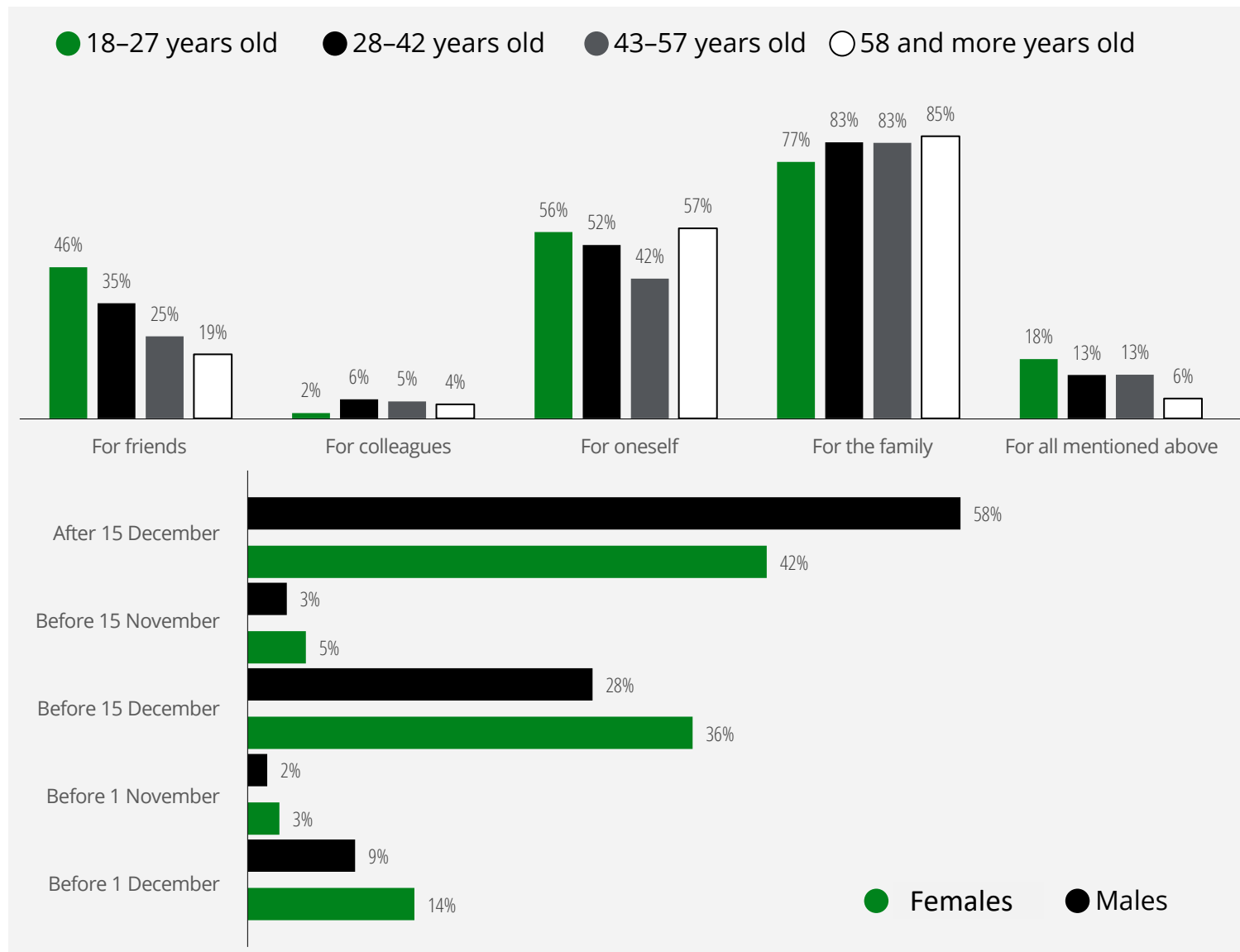


# Where and for Whom Ukrainians Are Going to Purchase Gifts

**83%**  
Ukrainians primarily purchase gifts for the family

In the conditions of high uncertainty caused by the war, Ukrainians postpone their shopping until the second half of December

For comparison: In the U.S., the majority of respondents plan to make their New's Year purchases by late November



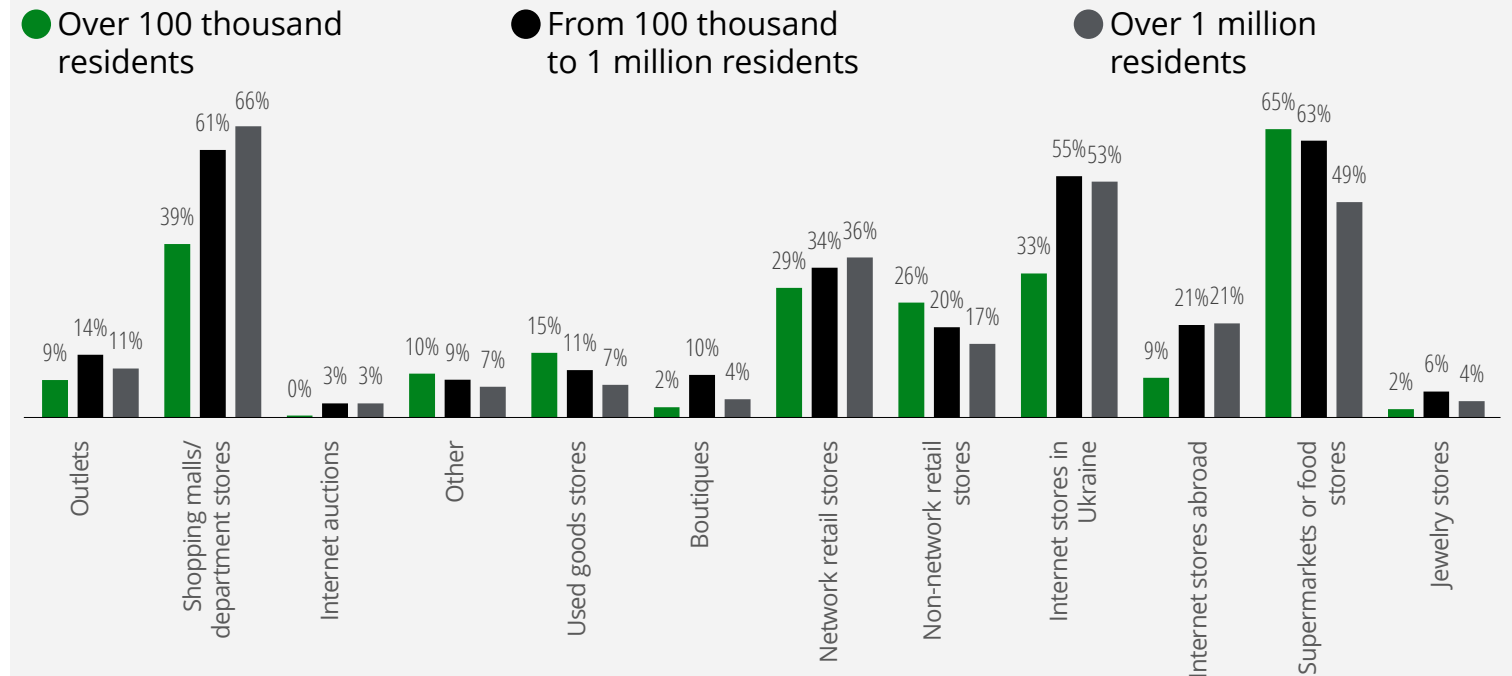
## Shopping Formats

Popular shopping locations:

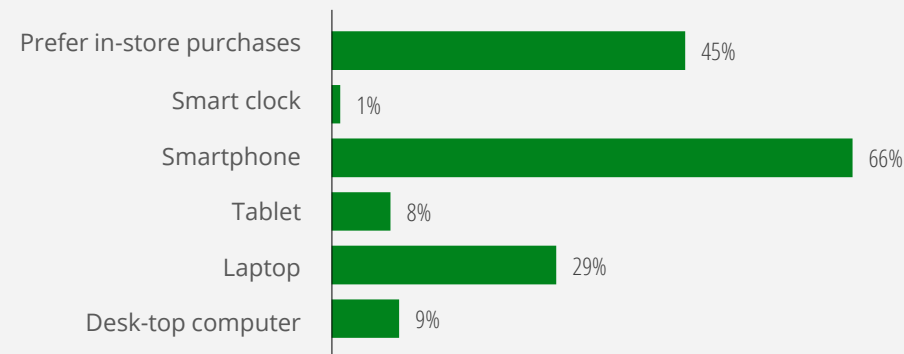
<b>Supermarkets or food stores</b>	<b>60%</b>
<b>Shopping malls/ department stores</b>	<b>55%</b>
<b>Online (Internet stores in Ukraine)</b>	<b>48%</b>

### PORTRAIT OF A TYPICAL BUYER

- Woman, 28–42 years old
- Employed by a commercial or budget organization
- Lives in Kyiv or Kyiv Region, Central or Western Ukraine



The most popular devices for making purchases



**66%**  
use smartphones for making purchases

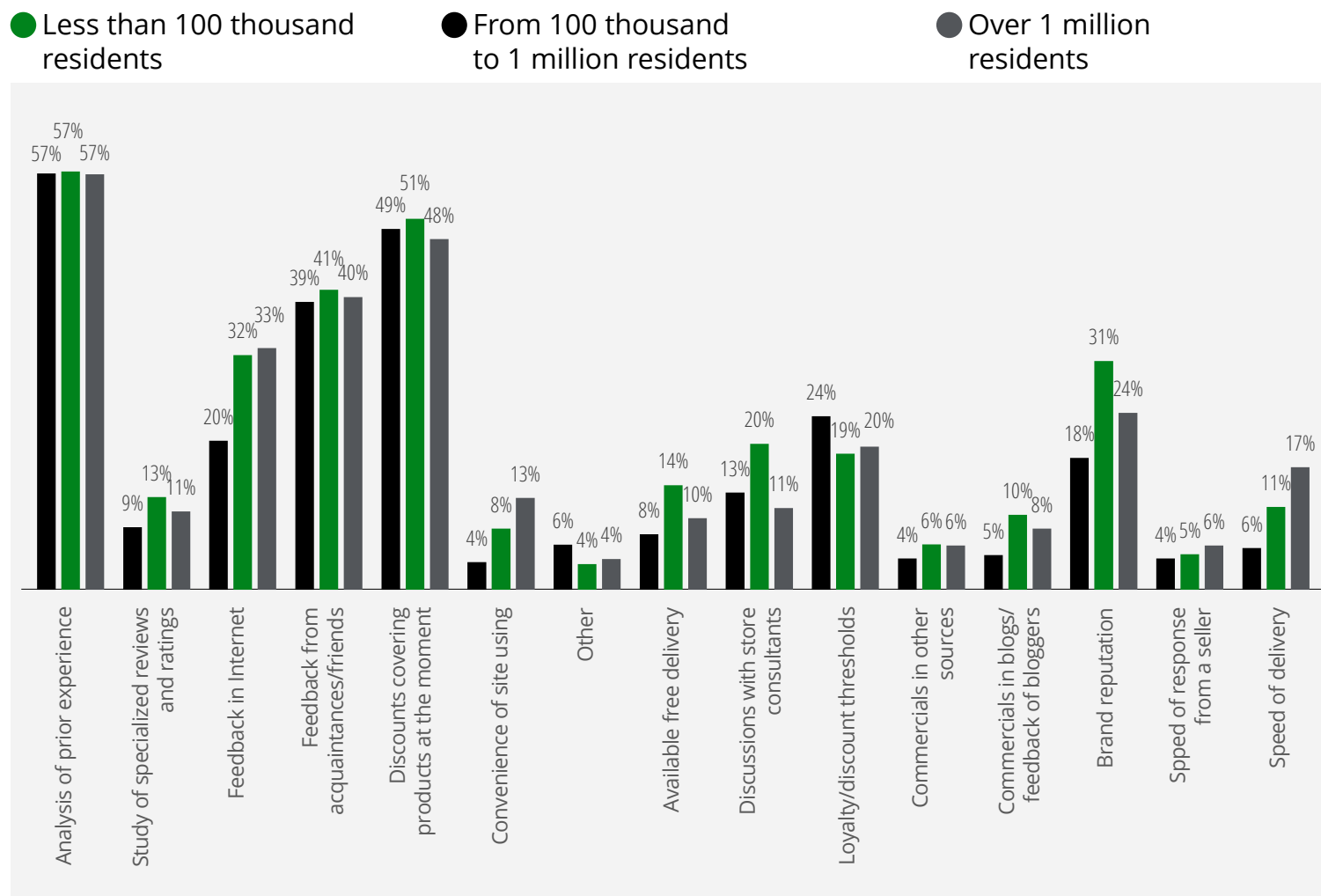
# Factors that Affect Decision Making

When ordering goods from abroad, if the prices are lower than in Ukraine (by 20% and more), Ukrainians are ready to wait for the delivery:

**Up to 10 days** 31%  
**Up to 20 days** 16%  
**Up to 30 days** 6%  
**Not ready to wait** 47%

**63%**  
do not purchase products if the manufacturer/seller has not withdrawn from the market of the Russian Federation

Significant factors when making a purchase are **prior positive experience** and **available discounts**



## CONTACT DETAILS

If you have any questions related to this survey, please do not hesitate to contact us:



### **Oleksandr Yampolskyi**

Director, Head of Retail & Wholesale  
Distribution Industry Group, Deloitte  
Ukraine

[oyampolskyi@deloitte.ua](mailto:oyampolskyi@deloitte.ua)



Contact for media:

### **Anastasiia Beheza**

Head of PR, Deloitte Ukraine

+38 (095) 820 79 13

[abeheza@deloitte.ua](mailto:abeheza@deloitte.ua)



Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited (“DTTL”), its global network of member firms, and their related entities (collectively, the “Deloitte Organization”). DTTL (also referred to as “Deloitte Global”) and each of its member firms and related entities are legally separate and independent entities, which cannot obligate or bind each other in respect of third parties. DTTL and each DTTL member firm and related entity is liable only for its own acts and omissions, and not those of each other. DTTL does not provide services to clients. Please see [www.deloitte.com/about](https://www.deloitte.com/about) to learn more.

Deloitte provides industry-leading audit and assurance, tax and legal, consulting, financial advisory, and risk advisory services to nearly 90% of the Fortune Global 500® and thousands of private companies. Our professionals deliver measurable and lasting results that help reinforce public trust in capital markets, enable clients to transform and thrive, and lead the way toward a stronger economy, a more equitable society and a sustainable world. Building on its 175-plus year history, Deloitte spans more than 150 countries and territories. Learn how Deloitte's more than 345,000 people worldwide make an impact that matters at [www.deloitte.com](https://www.deloitte.com).

This communication contains general information only, and none of Deloitte Touche Tohmatsu Limited (“DTTL”), its global network of member firms, or their related entities (collectively, the “Deloitte Organization”) is, by means of this communication, rendering professional advice or services. Before making any decision or taking any action that may affect your finances or your business, you should consult a qualified professional adviser.

No representations, warranties, or undertakings (express or implied) are given as to the accuracy or completeness of the information in this communication, and none of DTTL, its member firms, related entities, employees, or agents shall be liable or responsible for any loss or damage whatsoever arising directly or indirectly in connection with any person relying on this communication. DTTL and each of its member firms, and their related entities, are legally separate and independent entities.

© 2022 LLC “Deloitte & Touche USC”. All rights reserved.