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Emarsys Valentine's Day Research Report

Australia February 2021

Holidays are often the busiest shopping periods for customers and marketers alike. Inevitably, the heightened holiday shopping activity can serve as an indication of imminent changes in consumer behavior. For example, the onset of the pandemic in 2020 certainly impacted the way customers engage with brands, driving new and returning customers online, which resulted in the first digitally led Black Friday.

In light of factors like continued lockdowns and e-commerce growth, how will holiday shopping events like Valentine's Day change for retailers? For customers? And what can marketers learn from Valentine's Day 2021 to help them prepare for the rest of the year to come?

In this research report from Emarsys, we evaluated Australian consumer responses to reveal new trends and emerging habits of customers, and discovered how their approach to shopping during Valentine's Day might be different in 2021. You'll learn which product categories are expected to grow this Valentine's Day, where Australian consumers' spend might increase, key motivating factors in purchase decisions, and more.

Q1. Which, if any, of the following clothing items have you invested most since the start of lockdown?

Top 4 clothing items Australian respondents have invested in:

18% of respondents in Australia invested the most in loungewear since lockdown.

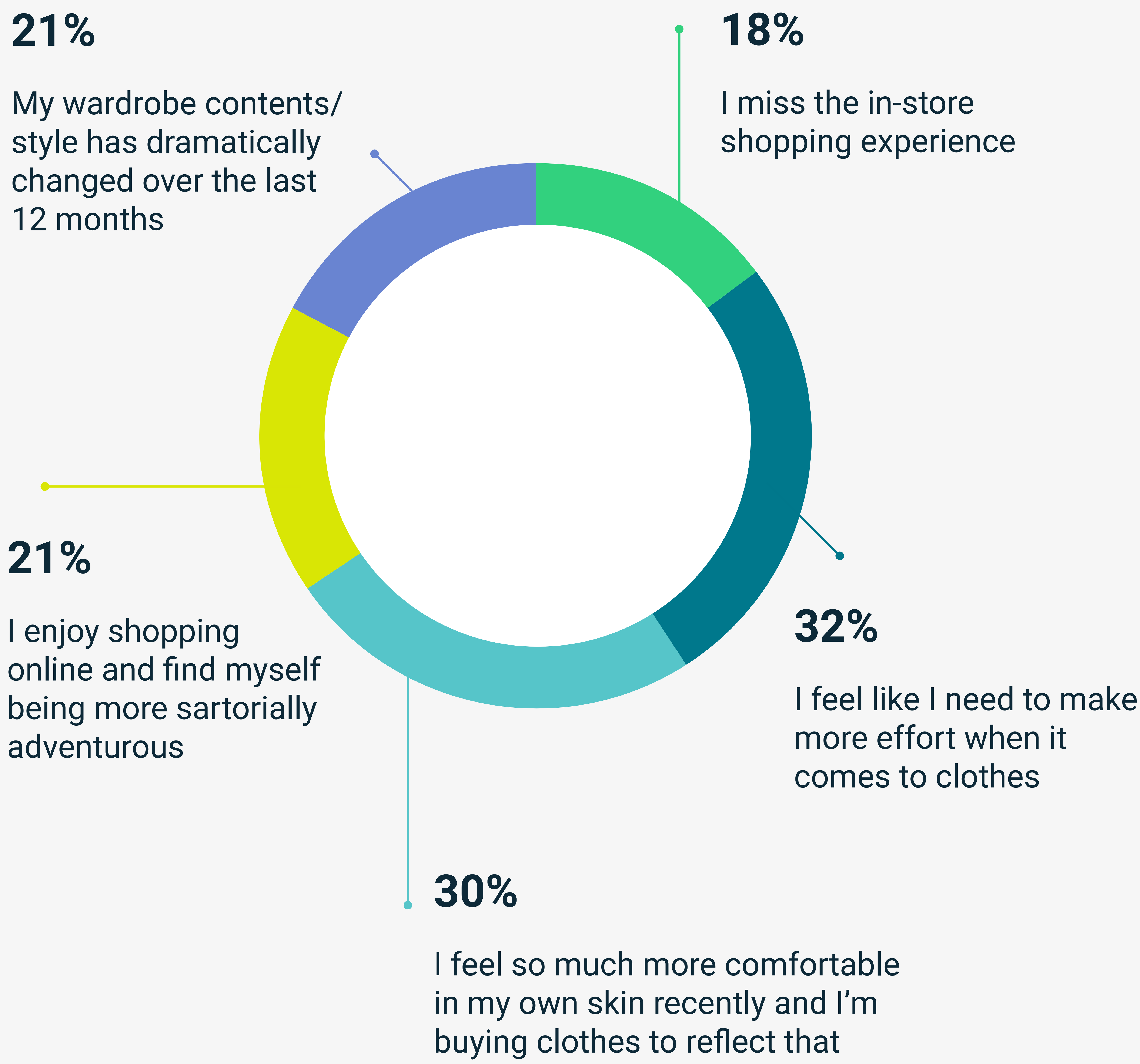
Almost a quarter (24%) of all 25-34 year-olds invested the most in loungewear since lockdown.

Q2. Can you estimate a % rise, if there is any at all, in how much more you have invested in underwear and loungewear since the pandemic began?

1-10%

Most respondents in Australia (26%) invested between 1-10% more in loungewear and underwear since the pandemic began

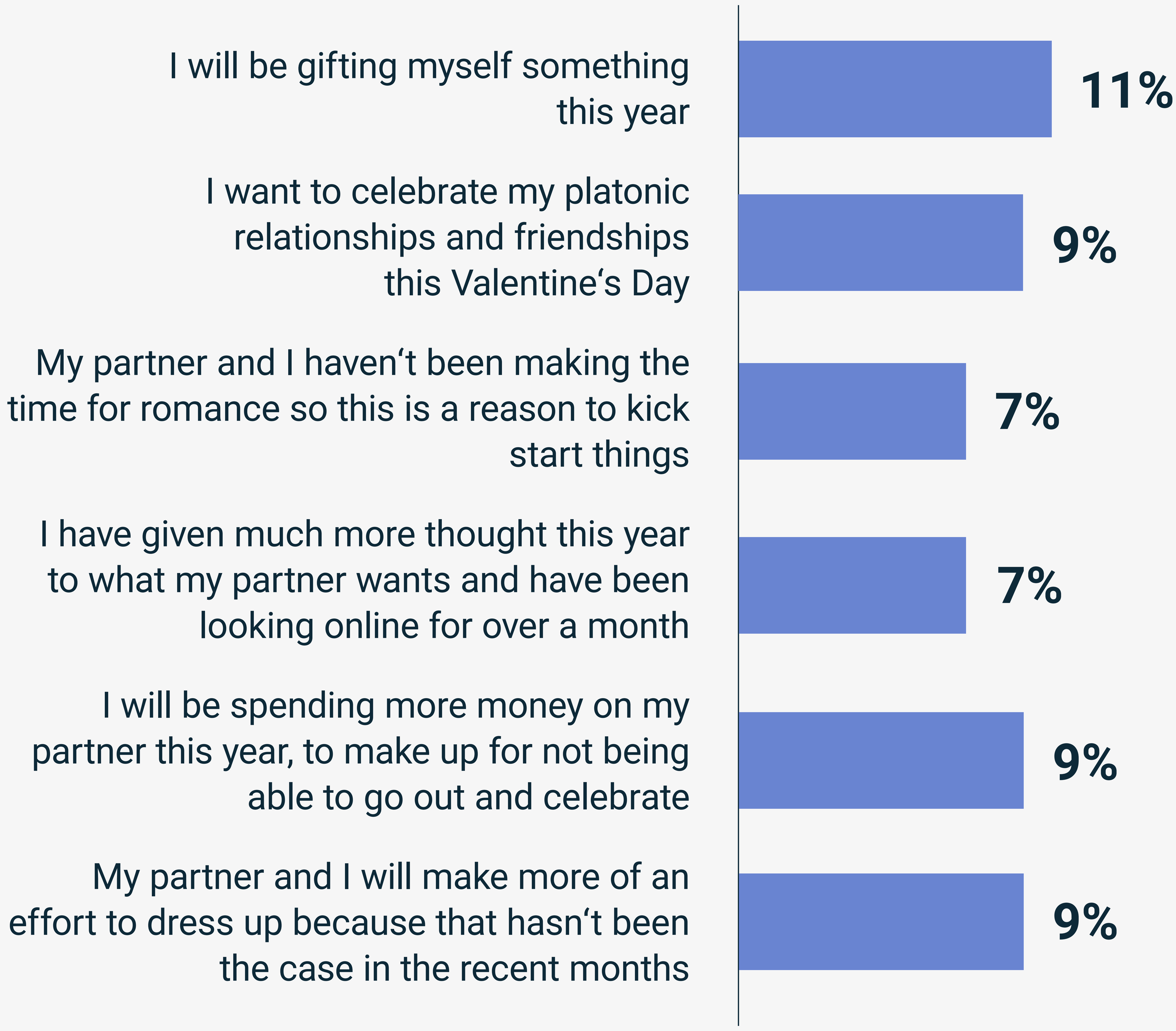
Q3. Which, if any, of the following statements do you agree with?



27% of men feel much more comfortable in their own skin recently and are buying clothes to reflect that comfort.

(32%) respondents of 16-24 year old respondents enjoy shopping online the most and find themselves being more sartorially adventurous

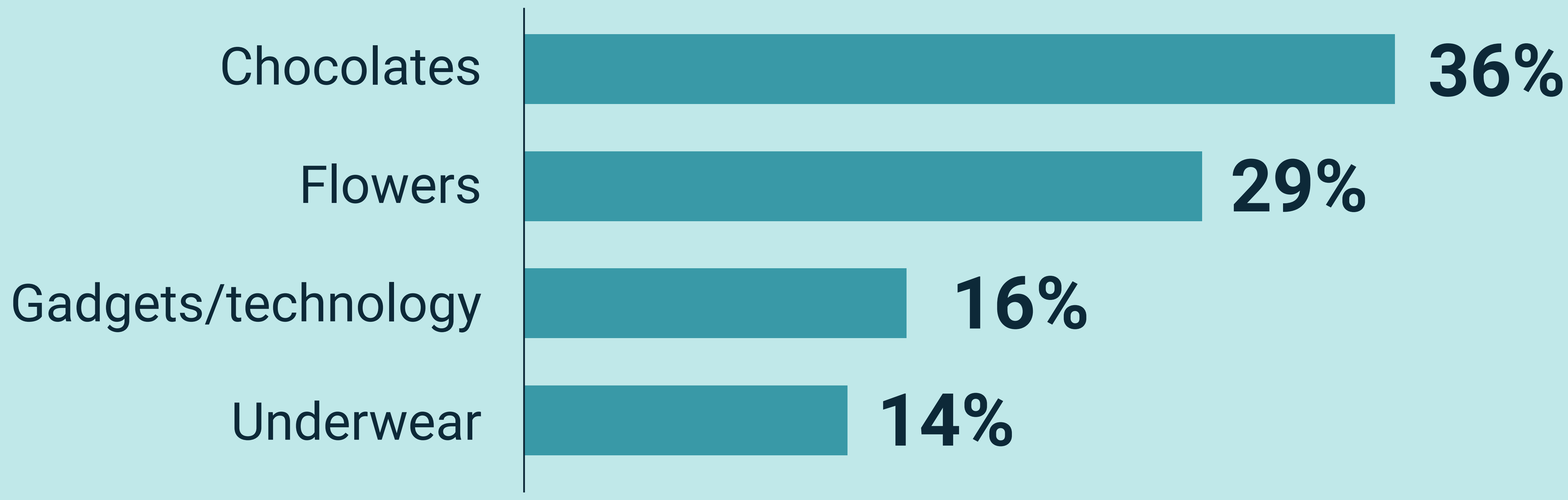
Q4. How, in any way, will Valentine’s Day be different to other years?



Valentine’s in Australia isn’t just for romantic relationships, as 11% of respondents will be gifting themselves something this year and 9% will be celebrating their platonic relationships and friendships this Valentine’s Day.

9% of respondents will be celebrating their platonic relationships and friendships this Valentine’s Day, this rises to 20% amongst respondents aged 16-24 years old

Q5. What, if anything, are you planning on gifting to someone or yourself this Valentine's Day?



More 25-34 year old respondents who have celebrated Valentine's Day will be buying underwear for themselves or someone else this Valentine's Day (22%) than any other age group, compared to 6% of 55+ year olds

Q6. Which, if any, of the following most represents your purchasing preferences on Valentine`s day this year?

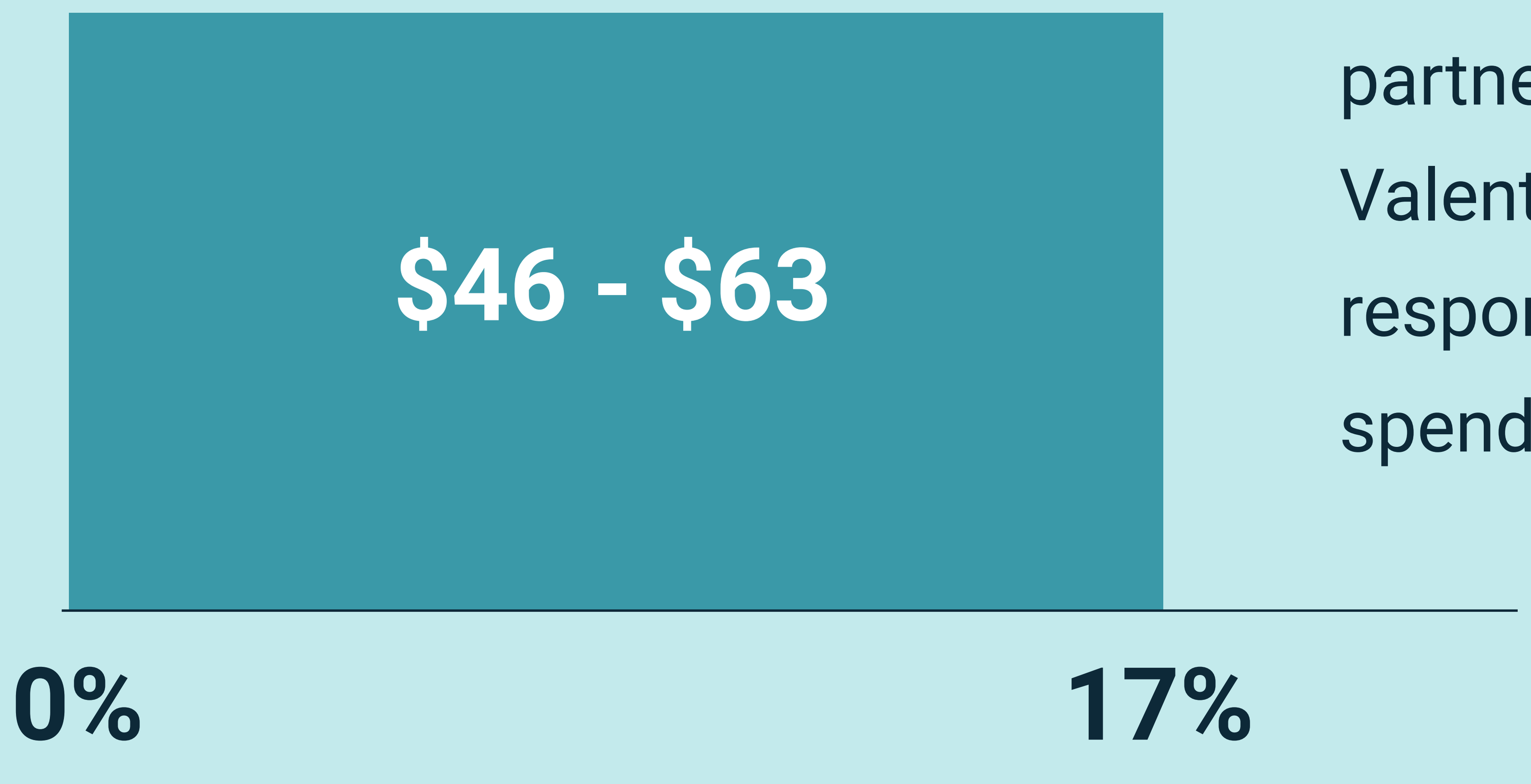
Men are more embarrassed about buying underwear instore – as 18% of male respondents would prefer buying gifts like underwear online because it's less embarrassing, compared to 13% of women

Q7. How much, if any, money did you spend on your partner for Valentines Day last year?

Out of those who have a partner and will be celebrating Valentine's Day, 9% of respondents will be spending over $125, compared to 3% respondents who have celebrated Valentine's Day before last year

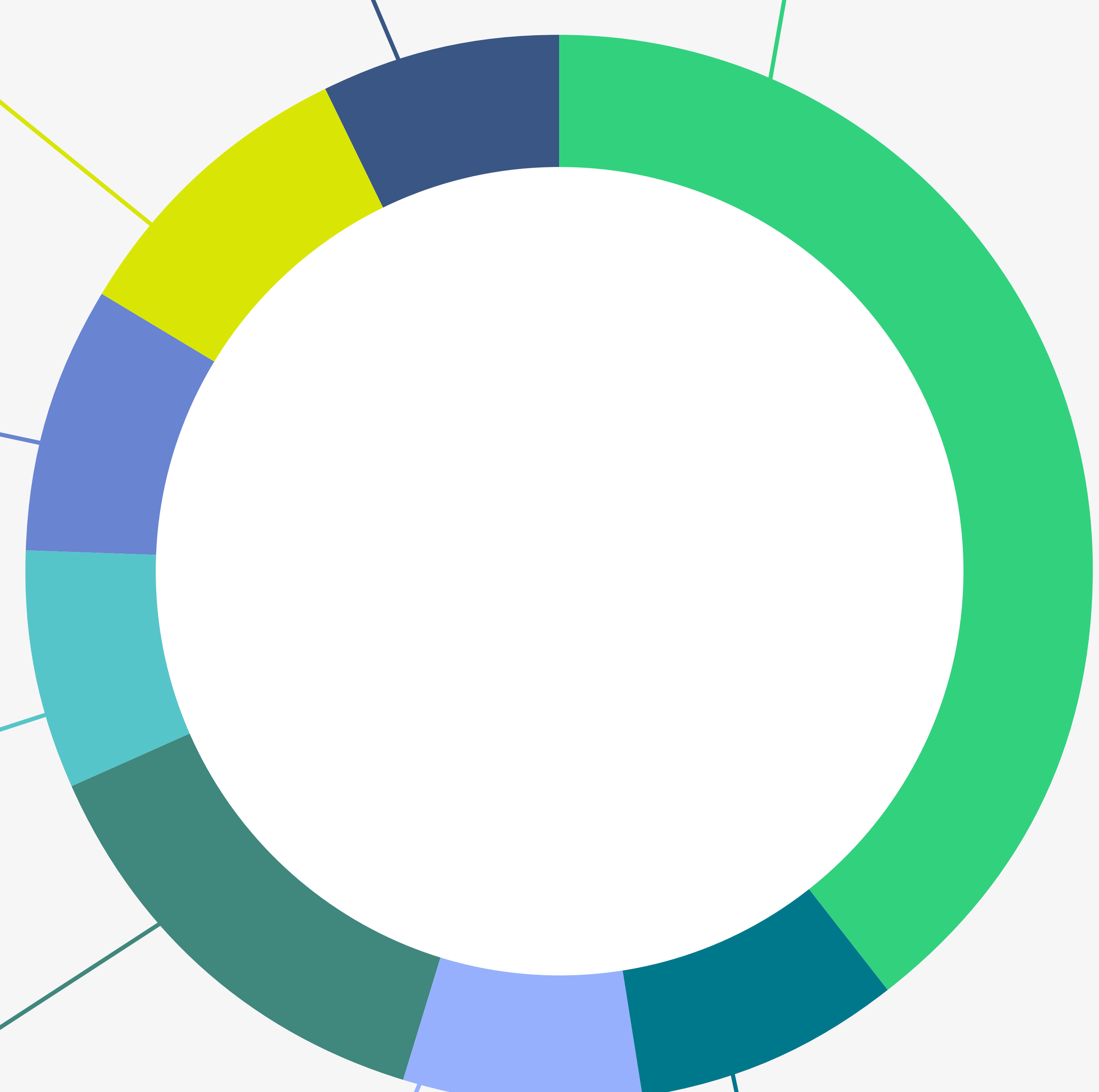
Q8. How much, if any, money are you spending on your partner this year for Valentines Day?

Out of those who have a partner and will be celebrating Valentine's Day this year, most respondents (17%) will be spending between $46 - $63.



Q9. Which, if any, of the following are true to you regarding your partner`s sizing? Meaning their bra size, waist size etc.

Respondents who have a partner



10%
I would like to be able to view underwear sizes and designs through an augmented reality interactive shopping experience, to help me

8%
I‘ll be guessing my partners sizing

44%
I know their sizing

9%
I would find it useful to view the clothes on personalized models, based on their measurements

8%
I will be checking how the underwear looks on real life people who model the clothes, to compare the sizing to my partner

15%
I‘ve already looked in their underwear drawer and checked their size

8%
It would be helpful to have access to an on-site quiz, so I can pick the right Valentine‘s Day gift

9%
I don‘t know my partner‘s sizing

15% of Australian respondents with a partner needed to look in their partner’s underwear draw to check their size

Over six times as many male respondents (19%), don’t know their partners sizing than female respondents (3%)

Q10. What, if anything, are/would be your worries or concerns about buying your partner underwear online instead of in store?

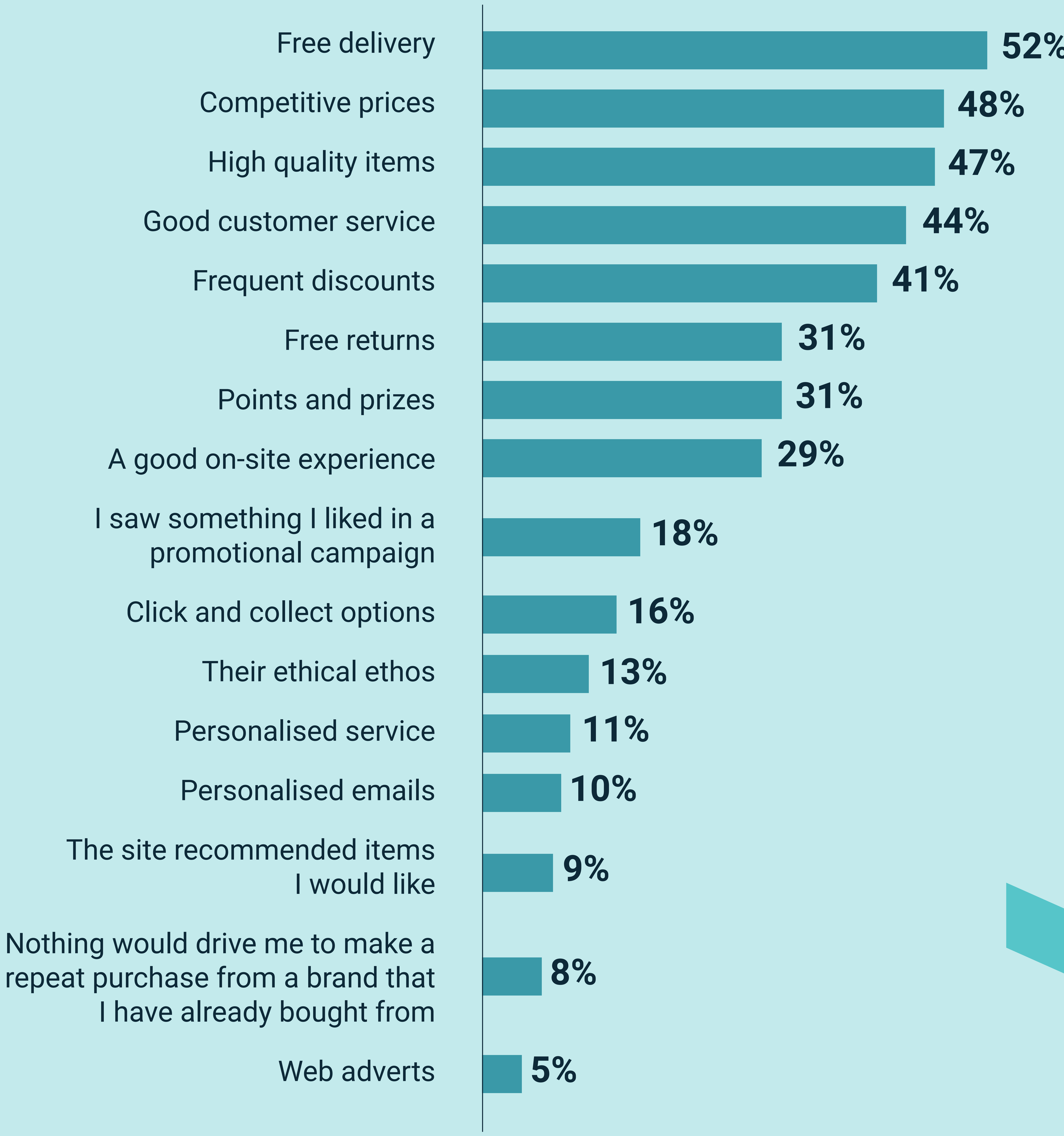
Poor sizing options (36%), bad quality material (36%) and risk of later delivery (32%) are the biggest worries or concerns for respondents who have a partner, buying their partner underwear online

Q11. What, if anything, do you/would you expect when you/if you were to join a brands loyalty program?

E.g. the Starbucks Rewards app, Amazon Prime, Sainsbury`s Nectar card, Virgin Atlantic Flying Club, Uber Rewards, H&M club.

Discounts (61%), free delivery and returns (49%) and earning points when you spend (55%) are the top three expectations for respondents from joining a brands loyalty program

Q12. What, if anything, would drive you to make a repeat purchase from a brand that you`ve already bought from?



Free delivery (52%), competitive prices (48%) and high quality items (47%) are the top three things that would drive respondents to make a repeat purchase from a brand they had already purchased from.

Q13. What, if anything, made you buy something from a brand for the first time?

Low prices/discounts (46%), fast and free shipping or returns (26%) and competitive prices (38%) are the top three reasons that respondents have bought something from a brand for the first time.

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