

ShopperPANEL

EDITION 12

creative **activation**

CLEMENGER FIELD MARKETING

ShopperPANEL

EDITION 12 (October 2025)

Consumer Behaviour In Australia

The focus in this edition is the impact of the evolving retail environment on the Australian consumer's purchasing decisions. Rising cost-of-living pressures, economic uncertainty, and shifting shopping habits are influencing both what consumers buy and how they choose to shop. This includes the growing loyalty to bricks-and-mortar stores for immediacy and experience, balanced by a strong reliance on digital channels for research and convenience. The modern shopper is no longer choosing between online and in-store; they're navigating both, and expect consistency, value, and trust at every step.

Our analysis covers what makes for a seamless and high-value experience across both channels, highlighting the operational and emotional factors that drive trust and spending.

ShopperPANEL provides in depth analysis of shopper behaviours and predictive insights into the future of the shoppers needs and wants.



About this Report

In the twelfth edition of our ShopperPANEL Retail Insights, we delve into the evolving behaviors, motivations, and expectations of Australian shoppers as they approach Black Friday 2025 and the broader holiday season. Against a backdrop of economic uncertainty, persistent cost-of-living pressures, and shifting channel preferences, our data paints a picture of a highly considered, digitally empowered consumer.

This report synthesizes responses from a nationally representative panel of over 1200 people, segmented across age, gender, household types, and regional vs metro locations. Each respondent provided detailed feedback to over 40 questions spanning shopping behaviors, payment preferences, research habits, service expectations, and macroeconomic sentiment.



Snapshot of findings

Executive Summary

Consumer Landscape

26% Economic outlook

of consumers are 'very negative' about pressures easing

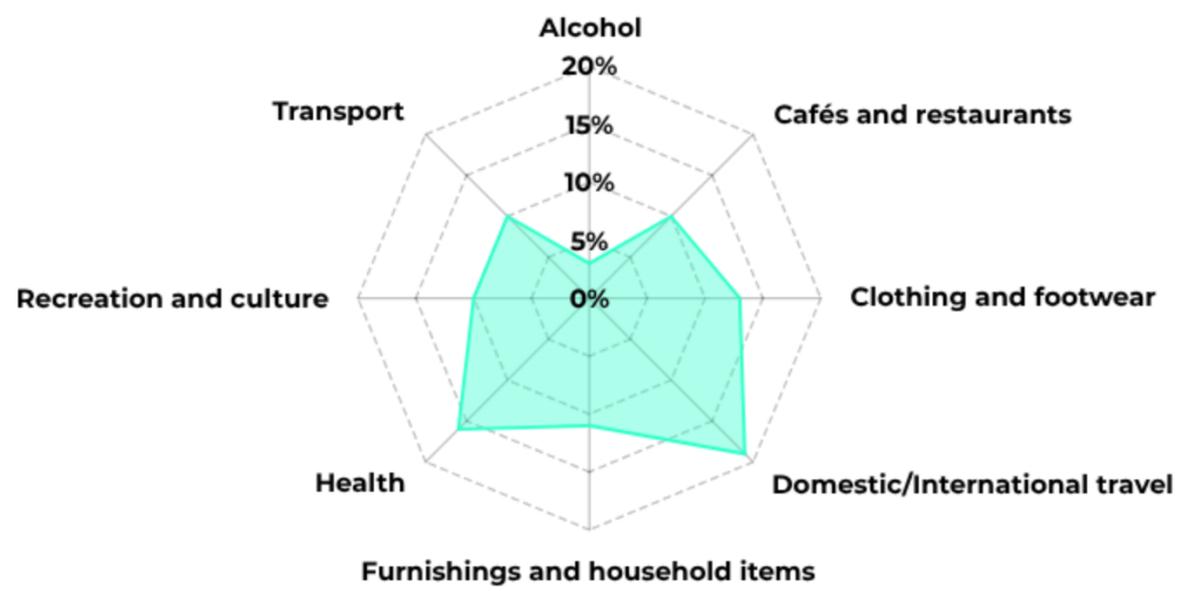
Baby Boomers (55+) are the most optimistic age group

+45% Online Shopping Confidence

of consumers are more confident shopping online (+5% on 2024)

In-store environments are battling the convenience and accuracy that online has evolved to.

Categories on the RISE



Categories on the DECLINE

- #1 Eating Out
- #2 Fashion
- #3 Home/Alcohol

Black Friday

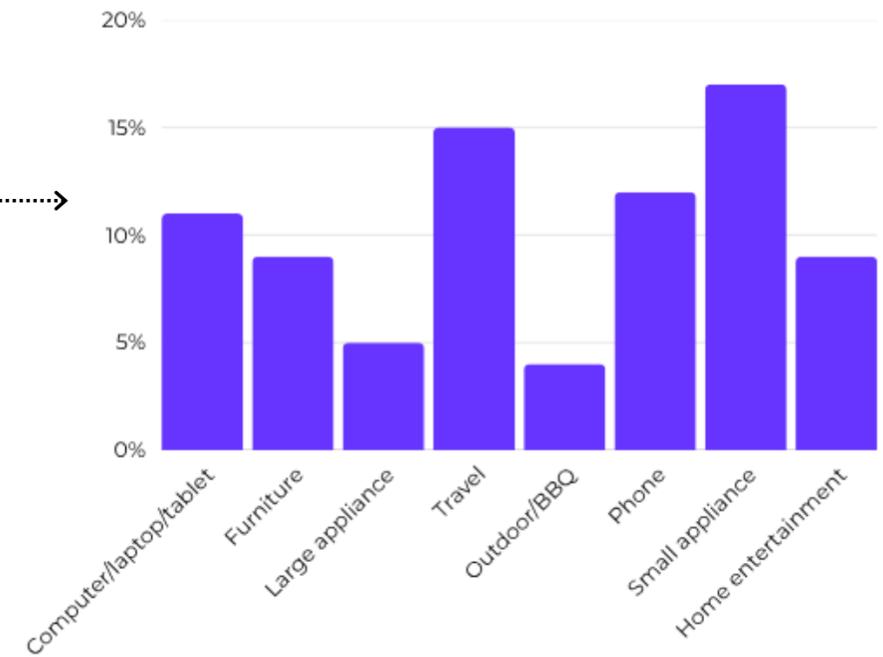
<\$50 Average Spend

85% of consumers are planning to spend up to \$500

51% Gift Shopping for Christmas

Big ticket items for Black Friday

- #1 Tech
- #2 Travel
- #3 Home



Shopper Sentiment and Trends At a Glance

- +2%**  **Shopping Behaviour**
More online-leaning: Mixed online/in-store preference grew **(+2 %)**, while “mostly in-store” declined **(-2 %)**.
- +3%**  **Service Expectations**
Consumer-service satisfaction improved slightly **(+2 %)** while expectations climbed **(+3 %)**.
- +3%**  **Physical Store Motivation**
Immediate purchase matters more: “Need it now” ticked up **(+3 %)** while “touch/see product” softened slightly **(-2 %)**.
- +45%**  **Digital Confidence**
Online purchase confidence rose about **+45 %**, underscoring stronger comfort with e-commerce.
- +2%**  **Spending Adjustments**
Cutbacks: Dining out **(+3 %)** and clothing **(+2 %)** lead planned reductions. Growth: Travel **(+3 %)** and health/fitness **(+2 %)** categories continue to expand.

- +4%**  **Social-Commerce Influence**
Purchases from social-media links rose **+4 %**, showing stronger direct conversion from platforms.
- 3%**  **Travel to Major Cities**
Slight decline **(-3 %)** in trips to capital cities for shopping, reflecting better local/online options.
- +3%**  **Stockouts**
Shoppers are quicker to switch retailers when items are out of stock **(+3 %)**.
- +4%**  **Buy Now Pay Later**
BNPL usage increased **+4 %**, and for Black Friday purchases BNPL climbed **+3 %**.
- +4%**  **Economic Outlook**
Optimism improved from 29 % to 33 % **(+4 %)**, hinting at a modest lift in consumer confidence.
- +2%**  **Fulfilment Preference**
Home delivery nudged up **(+2 %)**; click & collect slipped slightly.

Consumer Landscape

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The Consumer Landscape

-
01. **Consumer Outlook:** How Australians feel about the economy and their financial futures, and what this means for retail confidence and planning.

 02. **Consumer Spending:** Where consumers are tightening their belts and where they continue to invest, including key differences by age, income, and location.

 03. **Consumer Attitudes:** Insights into what shoppers believe, expect, and demand, from genuine value to Consumer service and brand trust.

 04. **Consumer Habits:** How Australians are researching, buying, and receiving products, including growing online confidence and the rise of hybrid shopping.

 05. **Sentiment & Trends at a Glance:** A one-page summary of trending behaviours tracked between ShopperPANELs, spotlighting online confidence, social media shopping, and more.

Consumer Outlook

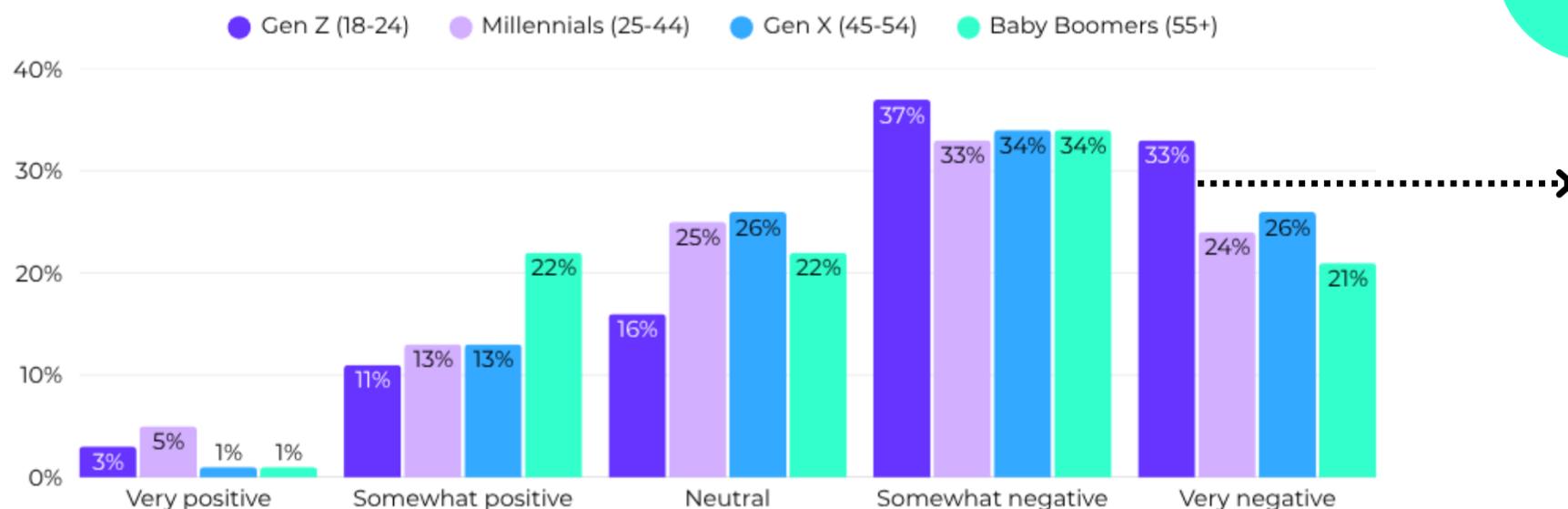
What's happening:

Australians remain cautious yet hopeful. While only a minority express strong confidence in economic recovery by 2025, younger demographics are slightly more optimistic. Inflation and interest rates are reshaping how households plan for the future, with income levels playing a pivotal role in shaping sentiment.

Why it matters:

Retailers must understand the cautious mindset influencing spending. A cautious Consumer outlook means longer purchase consideration windows, prioritisation of value, and more reliance on promotions and the importance of value.

Confidence that cost-of-living pressures will have improved by the end of 2025?



26%

Sentiment amongst all age groups is largely negative, with 26% 'very' negative that improvement is ahead. 33% of Gen Z respondents are the highest demographic with this concern.

22%

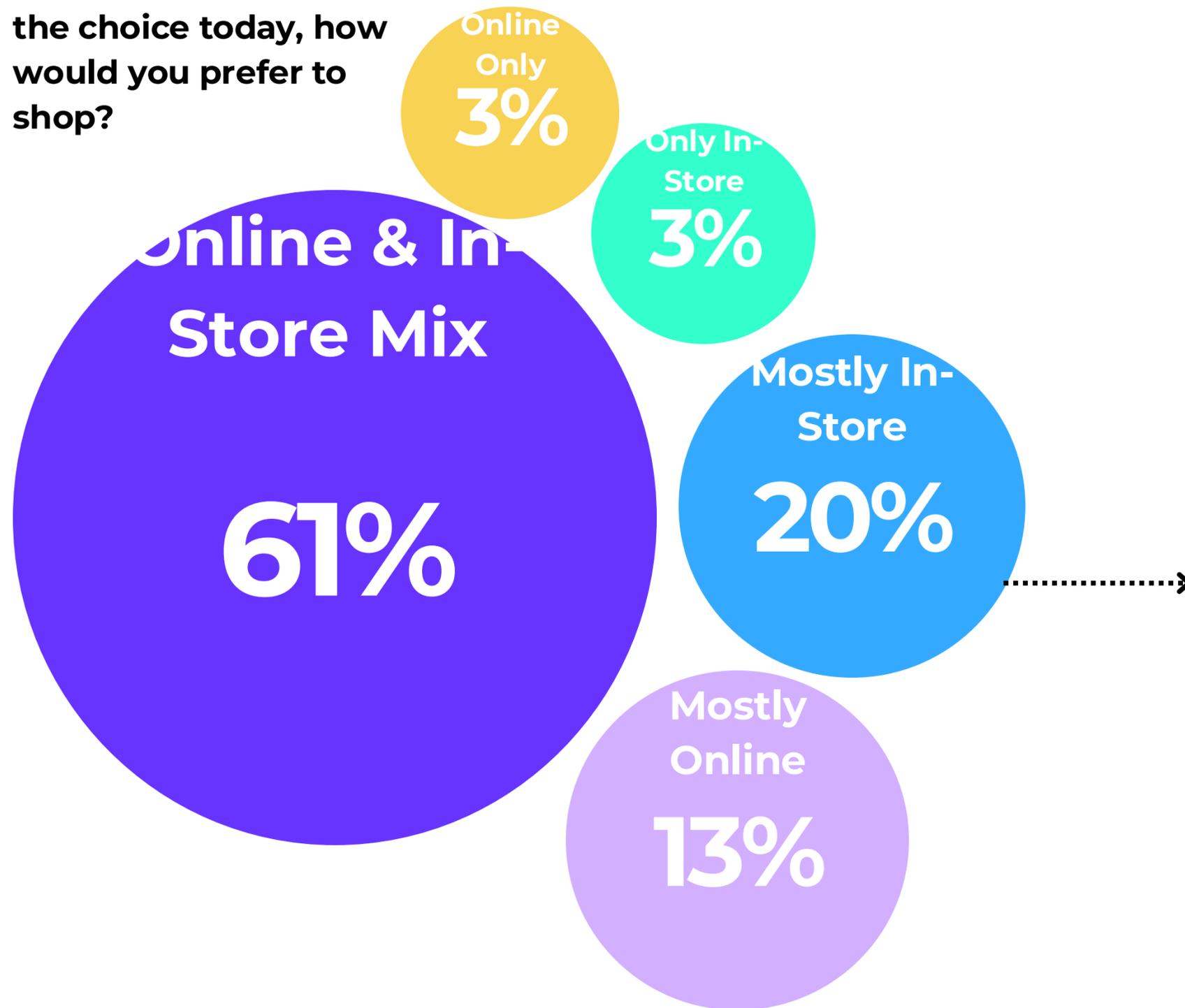
Baby Boomers (55+) are the most optimistic, with 22% somewhat positive, nearly double the rate of Gen Z and Gen X.

<\$60k

Lower-income earners / casual workforce are the least optimistic and likely impacted more heavily by cost of living pressures.

Optimism is low with a varied generational outlook on household and cost-of-living pressures easing ...

We asked our database **If you had the choice today, how would you prefer to shop?**



Shopper Landscape

Consumer Habits

What's happening:

Shopping habits are diversifying: hybrid buying is mainstream, social commerce is growing, and consumers increasingly research across platforms. Confidence in online shopping has grown, even among older cohorts.

Why it matters:

The path to purchase is nonlinear. Winning attention early and supporting at each stage, from discovery to fulfilment is crucial.

Down to **1 in 4** Consumers shopping mostly or only in-store (23%)

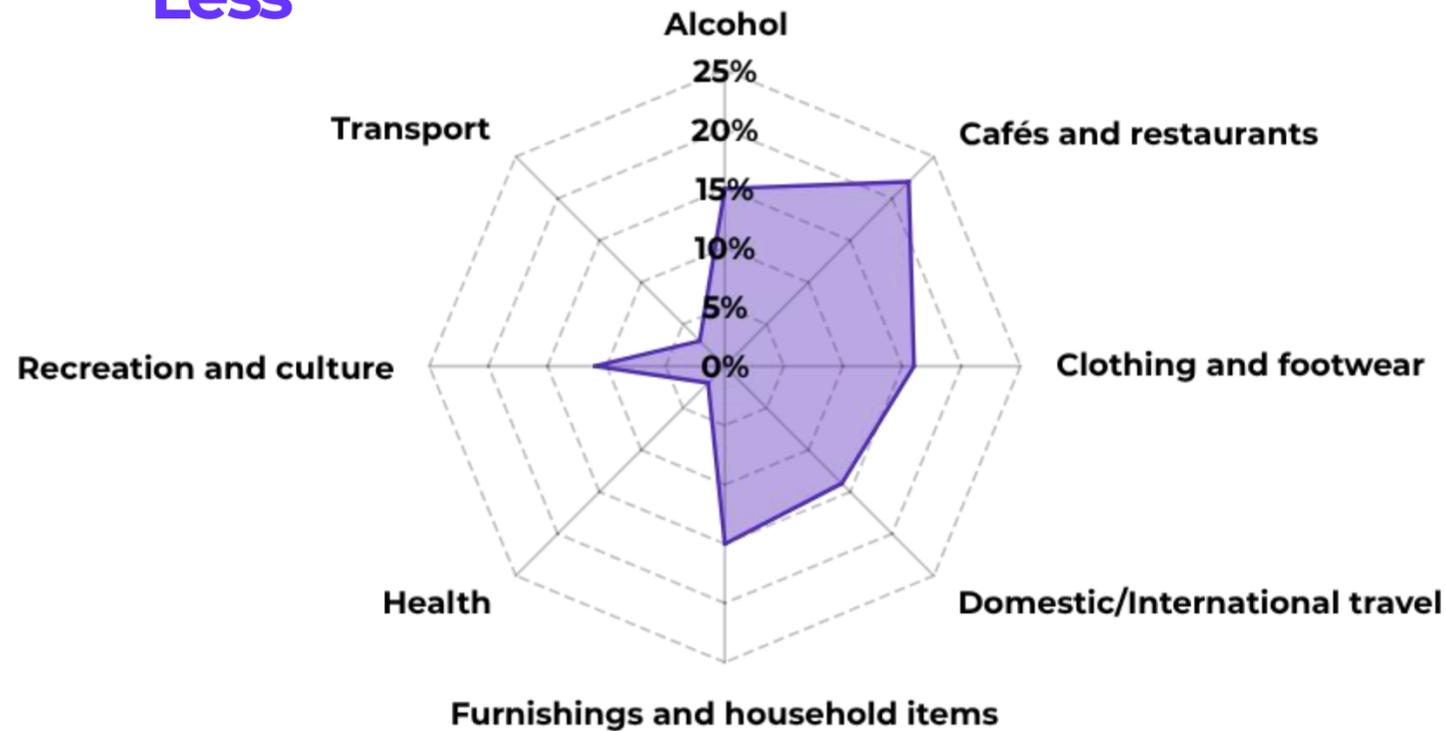
45% of respondents are more confident buying online +5% 2024

Shopper Landscape

Consumer Cut Backs + Spending

As cost-of-living pressures persist, Australian shoppers are making deliberate trade-offs in how they allocate their household budgets. This data shows where consumers are tightening their wallets, and where they continue to spend, invest, or indulge. The insights help identify categories under pressure and those that present ongoing opportunity.

Spending Less

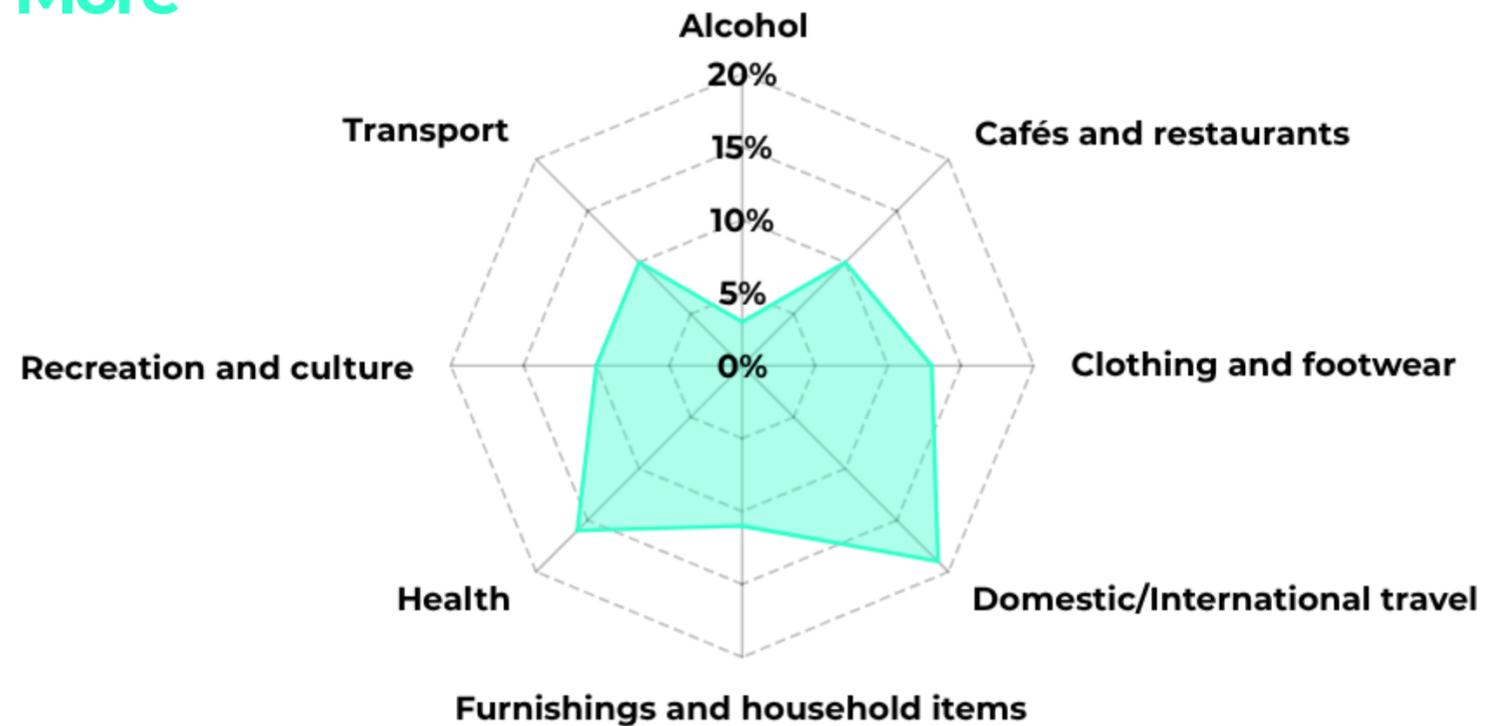


#1 Eating Out

#2 Fashion

#3 Home/Alcohol

Spending More



#1 Travel

#2 Health

#3 Fashion

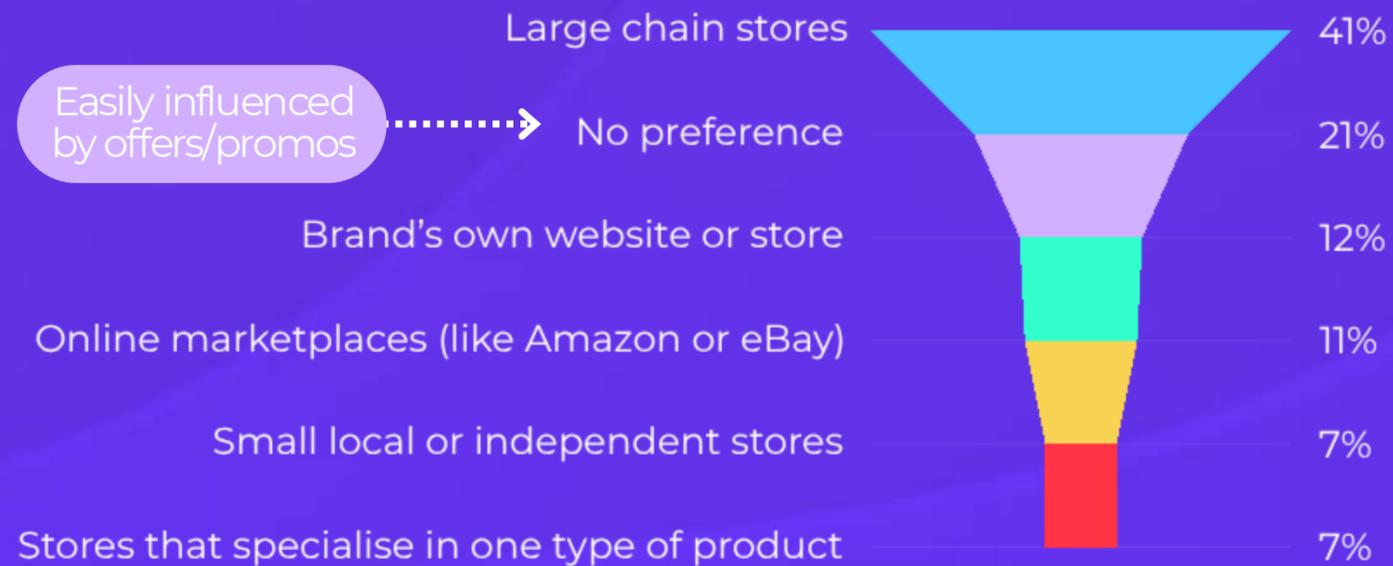
Shopper Landscape

Consumer Spending

What's happening:

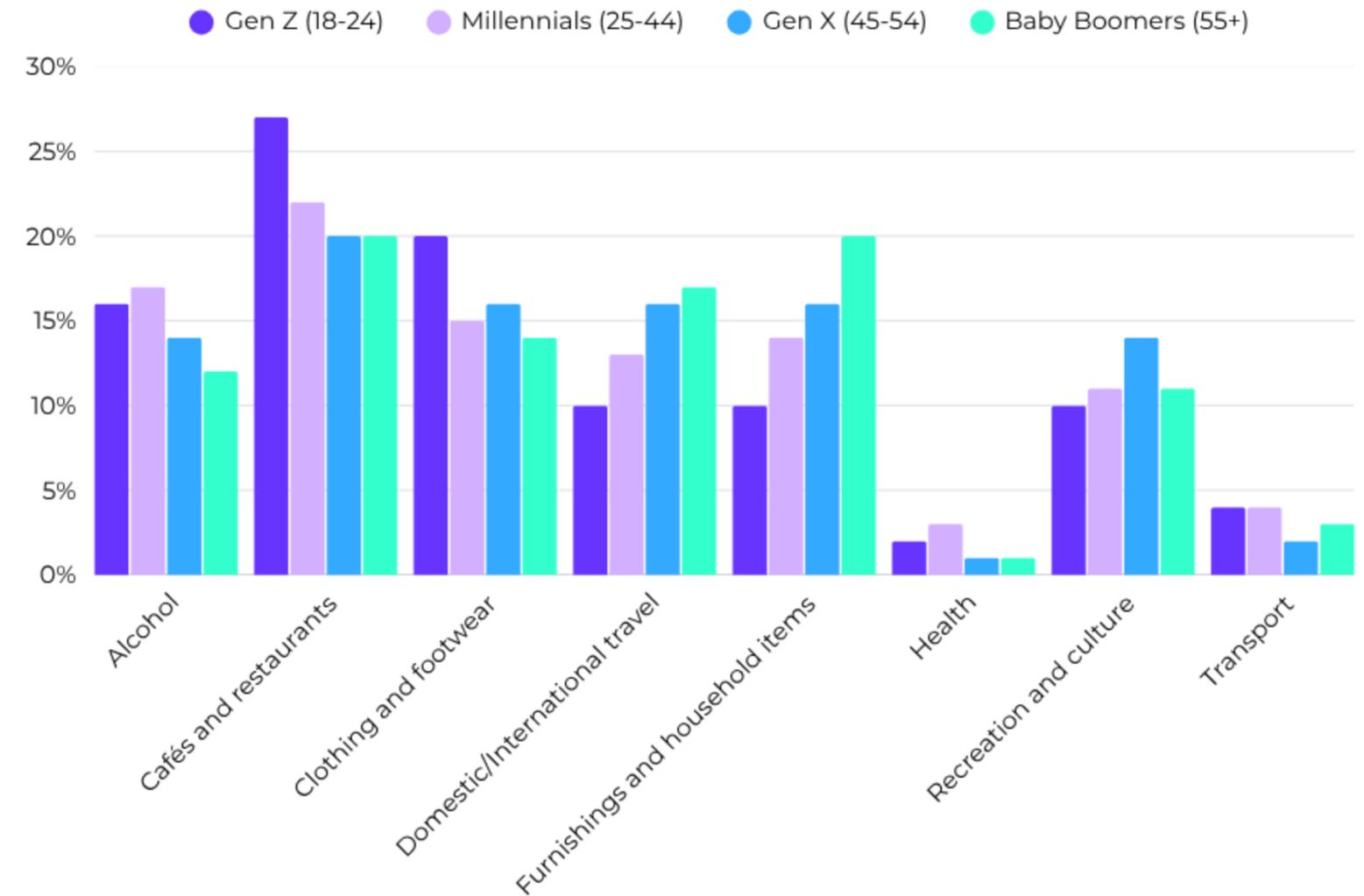
The majority of consumers are not stopping spend entirely. Instead, they are trimming across non-essentials. Categories like fashion, dining out, and beauty are among the first to be reduced, while health, groceries, and essential services remain resilient.

What type of retailer are consumers likely to complete their shopping in?

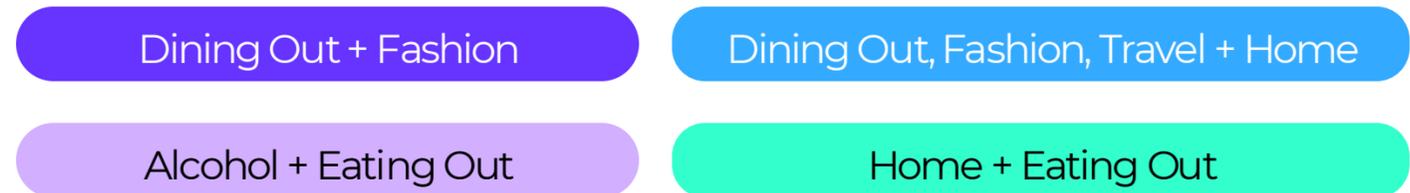


Consumers are reallocating spend to prioritise essentials and seeking brands that deliver value

We asked our database **If you needed to cut back your spending for the next 6 months, which categories would you reduce first?**



First areas of spending reduced by age group



Shopper Landscape

Consumer Attitudes

What's happening:

Trust, reliability, and transparency are paramount. Shoppers seek genuine deals, get overwhelmed by marketing saturation, and increasingly choose brands based on convenience and past experience.

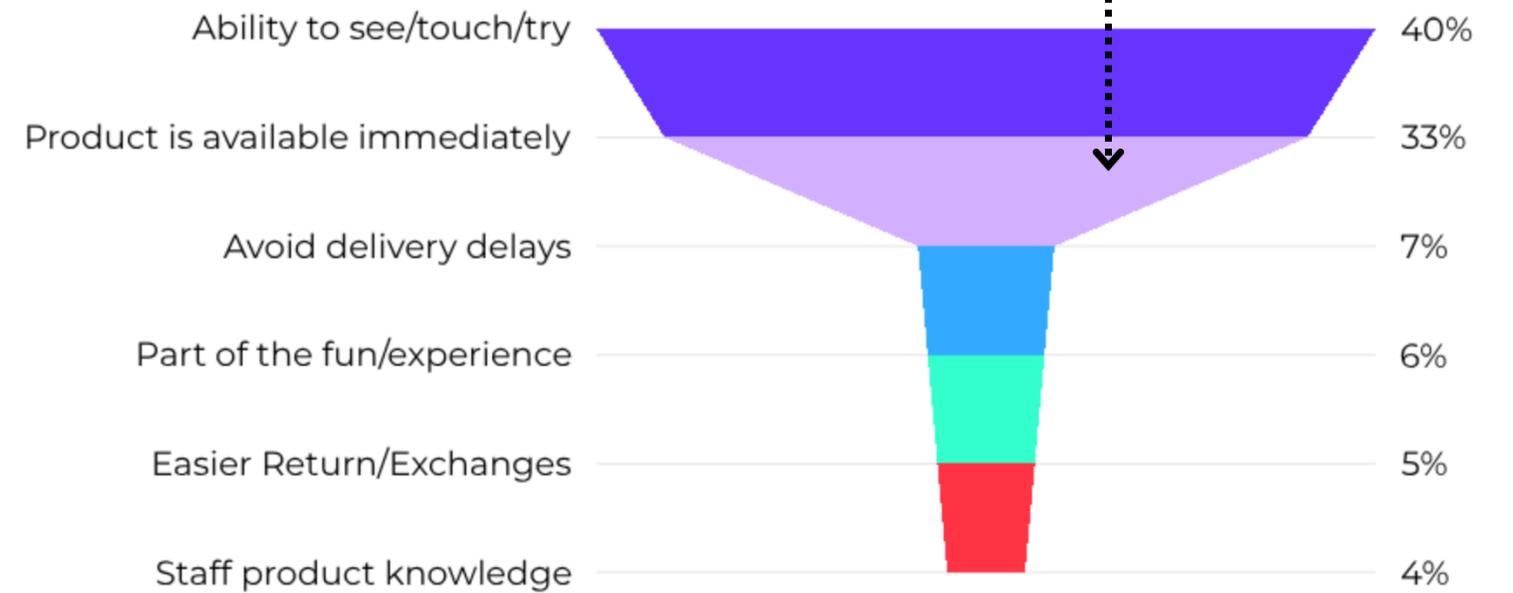
Why it matters:

The era of aggressive promotion is losing impact. Emotional loyalty, trust and frictionless service now play bigger roles than hype. Consumers are switching, but not just for price.

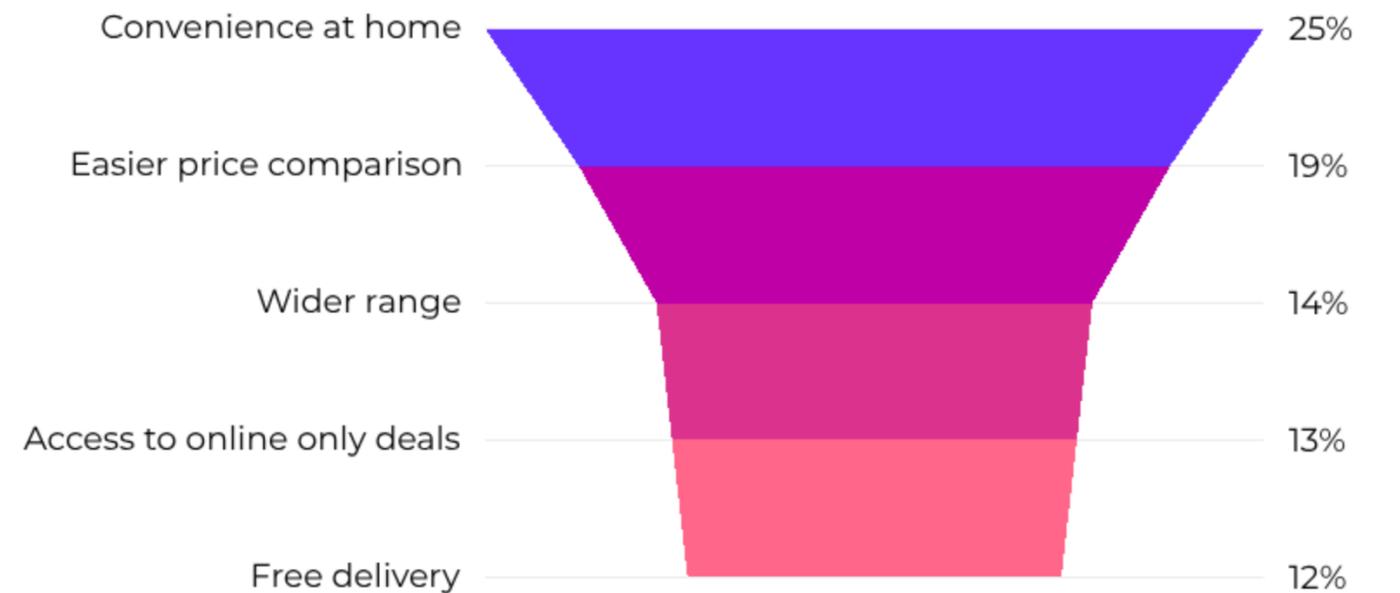
62%

of respondents agreed that they feel **“overwhelmed by marketing”** during major shopping events.

Main reason to shop **IN STORE** (Top 5)



Main reason to shop **ONLINE** (Top 5)



Consumer Landscape | Considerations

Today's shoppers are deliberate and channel-agnostic, 61% prefer a mix of online and in-store. Retailers must deliver seamless, value-driven experiences across both to win their share. Consistency, convenience, and clear value are now non-negotiable.

Consumer Outlook

- **VALUE CONSCIOUS APPROACH** - Use optimistic messaging and flexible payment solutions to appeal to value-conscious consumers.
- **GENERATIONAL CONFIDENCE** - Segment strategies by income and age to reflect divergent confidence levels.
- **INTENTIONAL SPENDING** - Consumers are suffering and are considerably more cautious in their current spending and prospects for future spending

Consumer Spending

- **CLEAR MESSAGING IN 'CUT' CATEGORIES** - Push for quality - Emphasise longevity, quality, and multi-purpose benefits in "cut" categories.
- **BUNDLING + LOYALTY** - Repeat Purchase - Consider bundling or loyalty discounts to keep share-of-wallet.
- **Consumer PERCEPTION** - Highlight "essential" framing even in non-essential categories.

Consumer Habits

- **THE ROLE OF BRICKS + MORTAR** - 61% of in-store Consumers are competing with online convenience and ease of checkout. What will entice those Consumers to bricks and mortar retail that adds value they don't receive online?
- **RESEARCH + ACCESSIBILITY** - Define the in-store staff role as the journey started long before Consumers enter a store

Consumer Attitudes

- **CONSUMERS BRAND STRONG** - Loyalty is high with only 5% of Consumers "willing to switch brands" led by Gen Z at 6%
- **OVERWHELM IS REAL** - Reduce decision fatigue by streamlining offers and checkout experiences.
- **STAFF MEMBER IMPACT** - The value of in-store assistance from a team member is diminishing, enhancing the 'feel + engage' element of product interaction is key

Black Friday

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Black Friday Key Themes

-
- 01. **Planned, Omni-Channel Shoppers Dominate:** Today's shopper is deliberate and digitally savvy. Research happens weeks in advance, and brand engagement must happen early.

 - 02. **Stores Are Crucial:** In-store excellence drives conversion and loyalty.

 - 03. **Value Wins the Basket:** Simplicity, clarity, and transparency outperform gimmicks.

 - 04. **Category Missions Drive Trips:** Focused shopping missions lead basket growth.
-

THEME 1 - Planned, Omni-Channel Shoppers

Early Deal Pursuit

As Australians prepare for the biggest sales event of the year, one thing is clear: shoppers are planning earlier and researching more deliberately than ever before. With the rising cost of living tightening household budgets, consumers are adopting a more strategic approach, carefully evaluating their options weeks in advance.

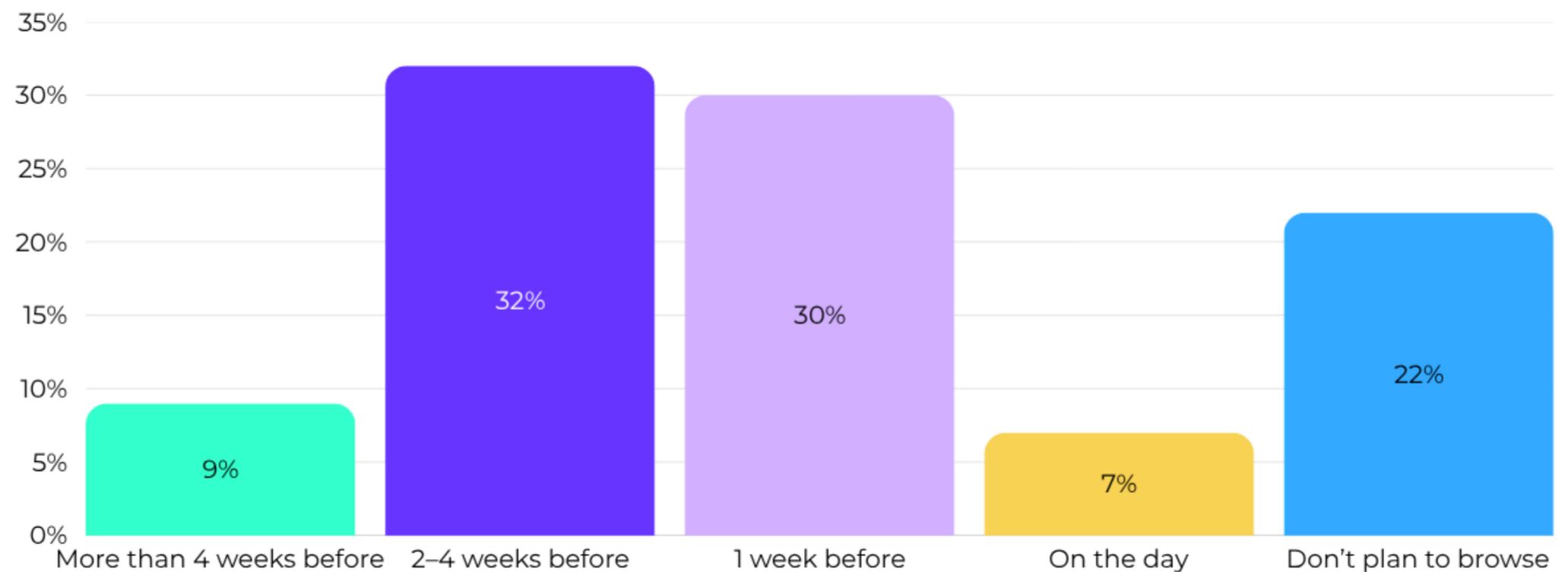
This shift is not just about bargain hunting. Shoppers are attempting to mitigate risk, ensuring product availability, assessing shipping timelines, and aligning purchases with real needs. As a result, the traditional Black Friday sales spike is now preceded by a 'pre-decision period' lasting up to a month.

71%

of respondents are
browsing from 1 - 4+ weeks
prior to Black Friday!

**Consumers are
wanting a sneak peek
sooner than you
think...**

When do shoppers start browsing for Black Friday deals?



THEME 1 - Planned, Omni-Channel Shoppers

Research-First Journeys

Shoppers today are empowered by access to information, and they're using it extensively. The research phase of the purchase journey is now a battleground where trust, transparency, and presentation win.

This year's data shows that Australians are turning first to retailer-owned websites and apps, ahead of even search engines or price comparison tools. This marks a critical shift: consumers want certainty and clarity directly from the source.

Demographic Insight - Purchases \$50-\$250:

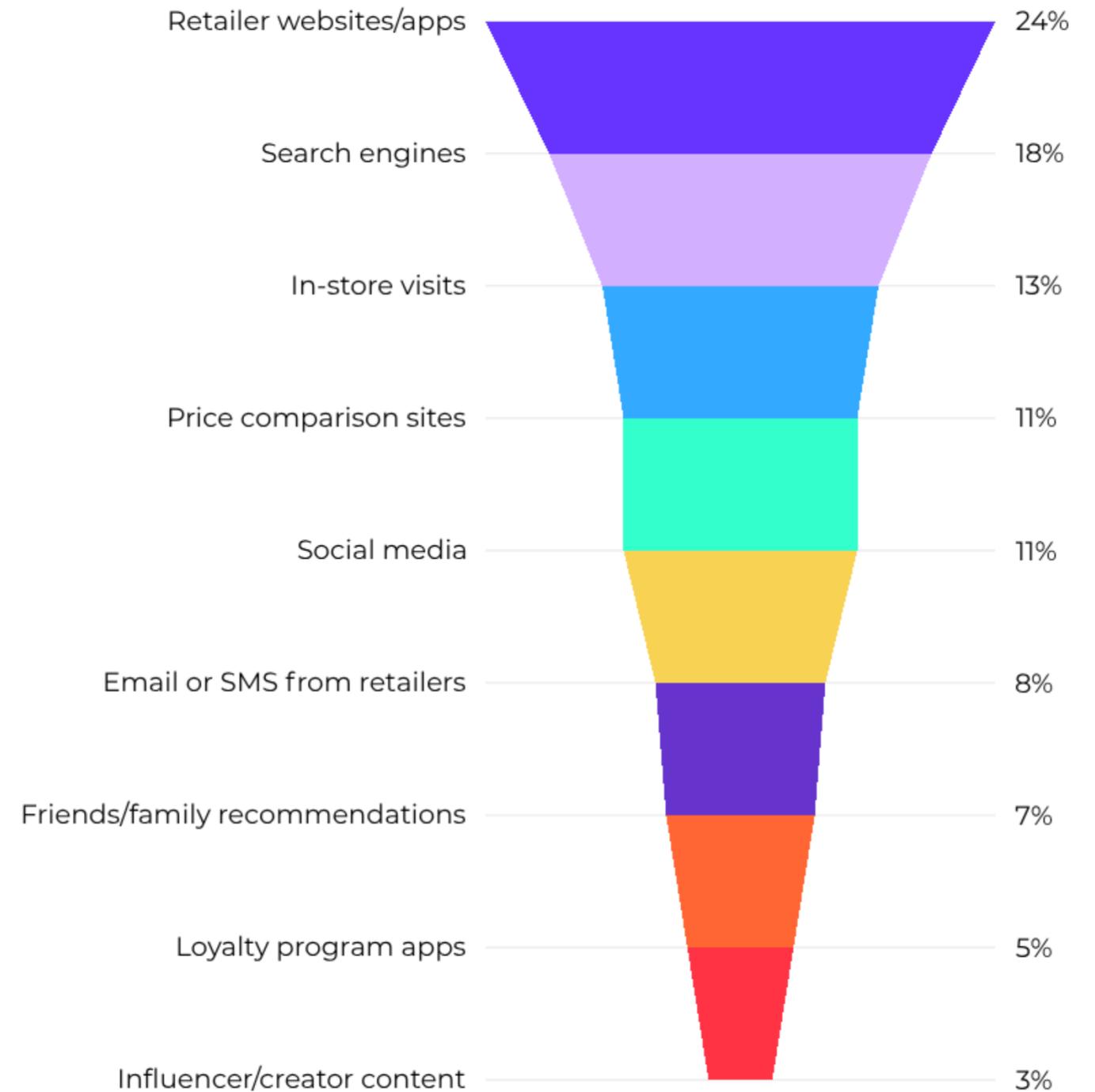
Ages >45

Lead the usage of retailer websites and search engines as trusted sources. 55+ increasingly turn to emails & SMS

Ages <24

Rely significantly more on social media and friends/family recommendations indicating a stronger influence from peers and digital communities.

Where do shoppers first research products?



THEME 1 - Planned, Omni-Channel Shoppers

Wishlists & Carts

(Decided Before Deal Day)

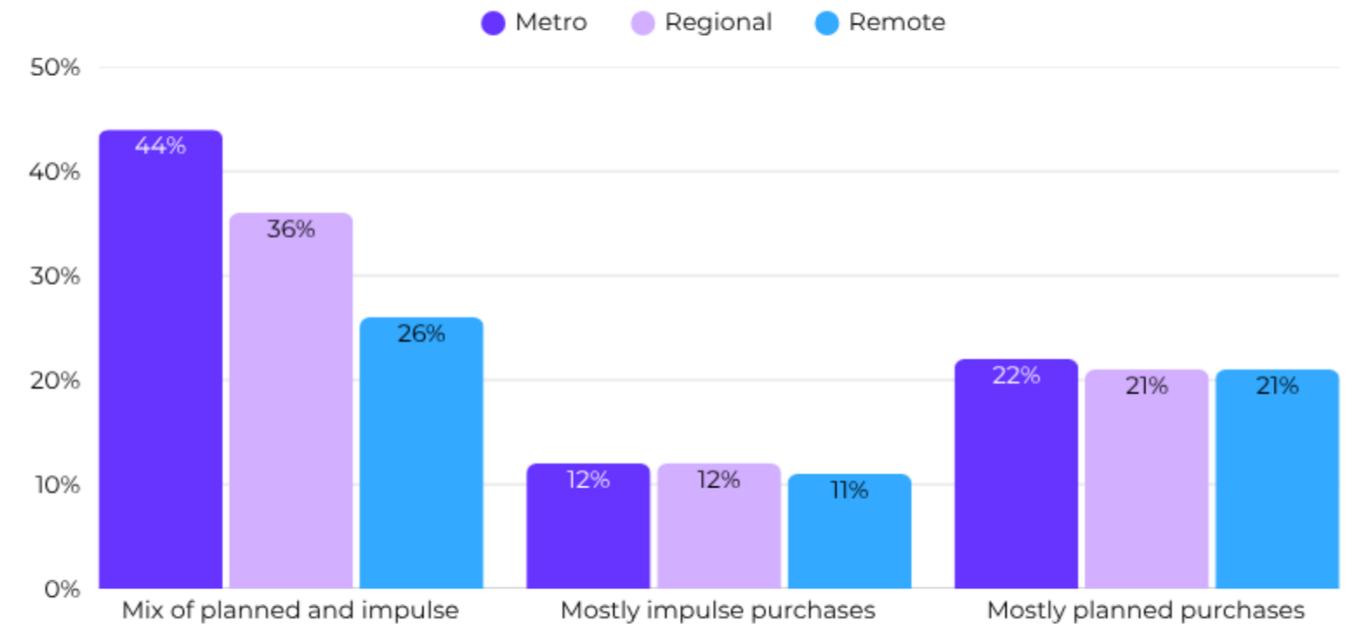
The myth of the spontaneous shopper is fading. In 2025, Black Friday isn't about impulse, it's about execution. Shoppers are building their baskets days or weeks before the sale begins. Many use tools like wishlists, shopping carts, and notification alerts to organise their purchases and act quickly when prices drop.

This trend represents a fundamental shift from reactive to proactive shopping. The modern shopper doesn't need persuasion on the day, they need reassurance that their decision is supported, that the price is right, and that the item is still in stock.

Retail Implication: Black Friday isn't a 24-hour sprint and instead treat it as a multi-week engagement. The Consumer journey starts with intent and planning, and ends with flawless execution.

*Shoppers don't need persuasion on the day, they need **reassurance** that their decision is right, price is right, and the item is still in stock...*

Which best describes the buying style during Black Friday?



46% of Gen Z (18–24) say they mix impulse and planned purchases, the highest among all age groups.

16% Only 16% of Gen Z (18–24s) describe their style as mostly planned, compared to 26% of Millennials (25–44s)

27% of Baby Boomers (55+) are opting out of Black Friday/Cyber Monday altogether.

THEME 2 - Stores Are Crucial – If Ops Don't Break:

Store Remains Core to Omni Strategy



In-store preference grows with age: Baby Boomers are the most in-store loyal, with 33% preferring mostly in-store, more than double Gen Z (20%). Gen X also leans toward stores with 22% preferring mostly in-store.

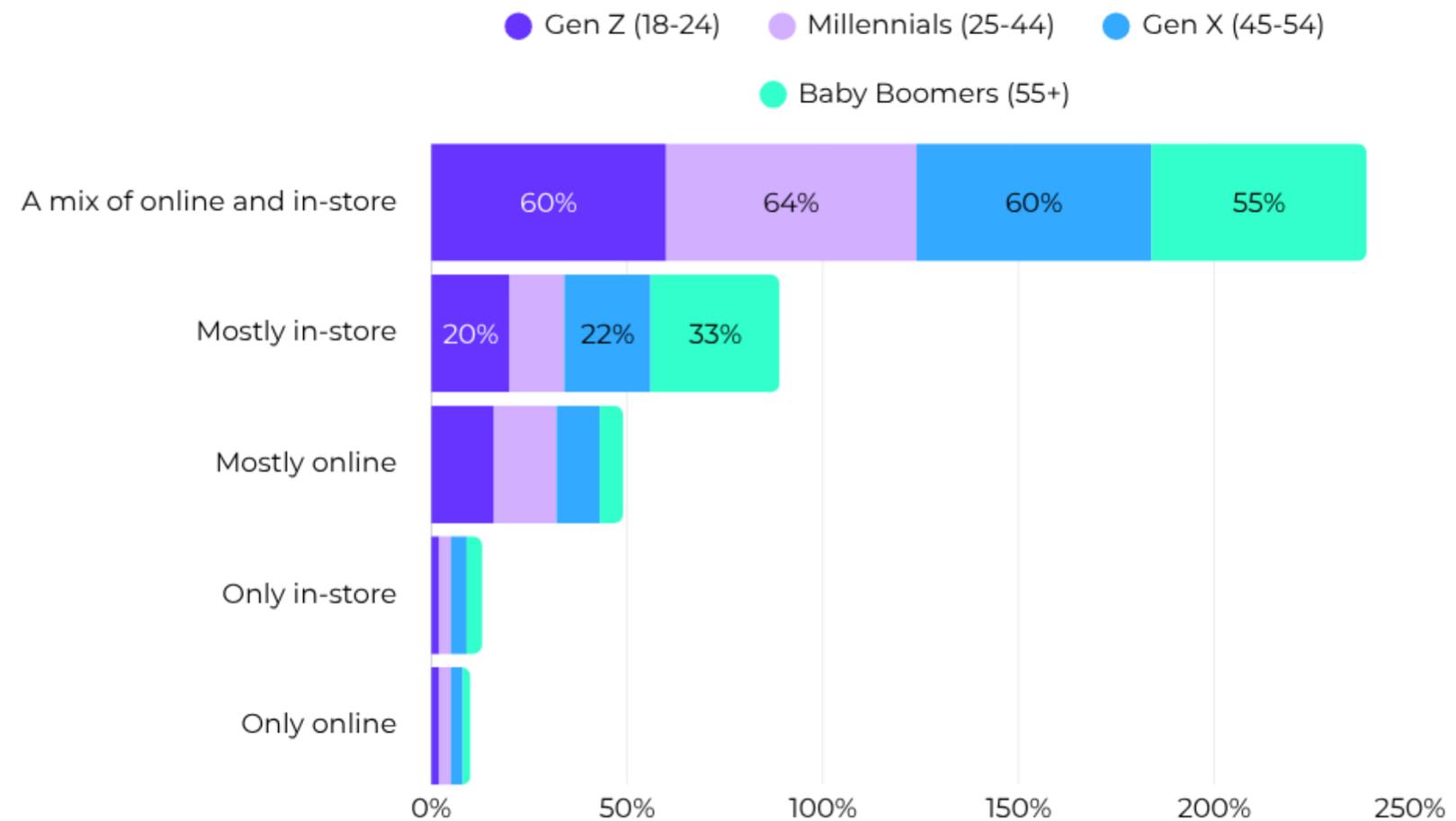


Gen Z and Millennials lean more into digital: 16% of Gen Z and Millennials prefer shopping mostly online, compared to just 6% of Boomers, underscoring generational differences in digital comfort and convenience priorities.



Remote area shoppers show highest hybrid adoption: 68% of remote respondents prefer a mix, the highest among all location types, reflecting growing digital accessibility even in less urban areas.

We asked our database **If you had the choice today, how would you prefer to shop?**



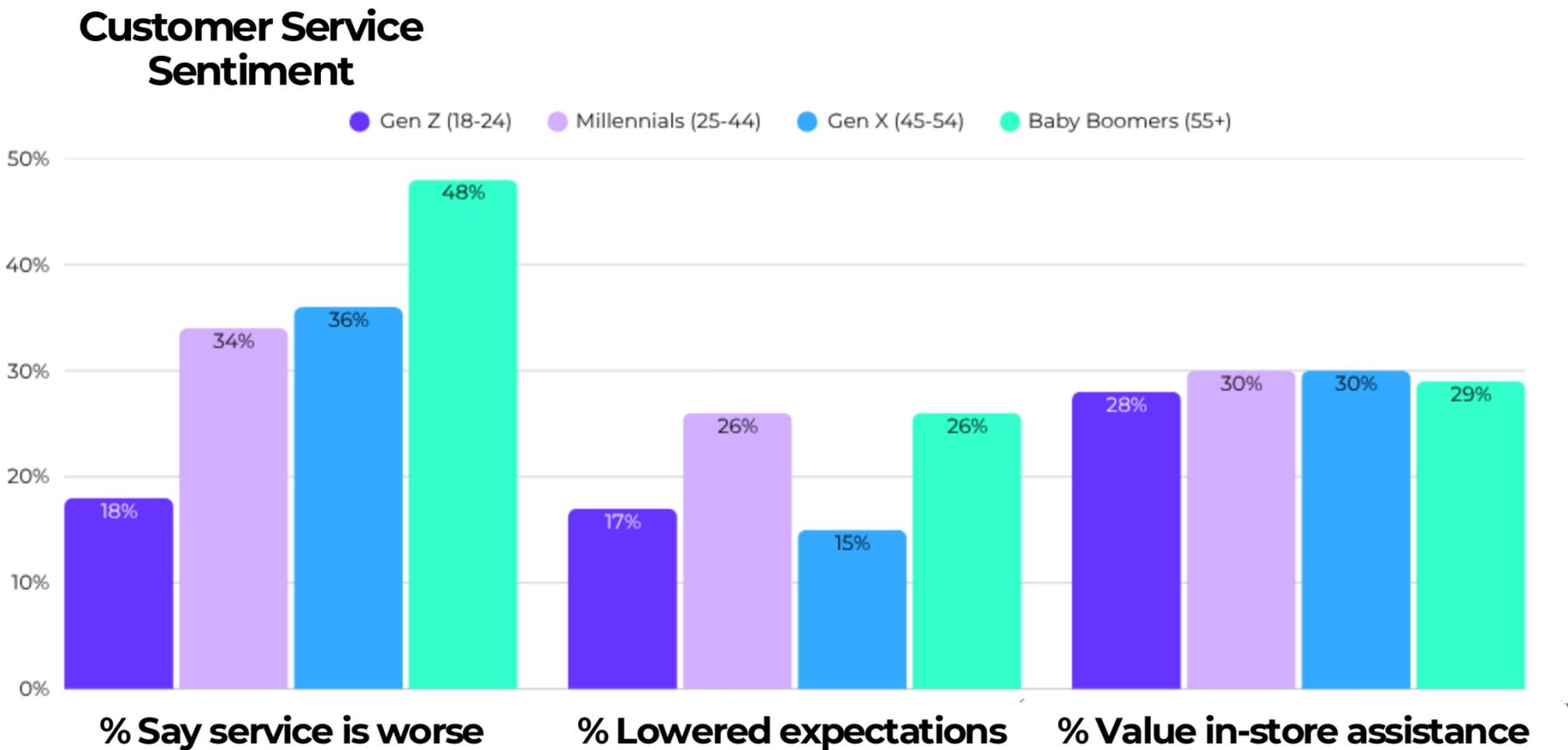
Shoppers now expect digital-like accuracy in physical environments. They want to know what's in stock, what it costs, and how quickly they can get it, before stepping foot in-store.

THEME 2 - Stores Are Crucial – If Ops Don't Break:

In-Store Friction Erodes Loyalty

In-store shopping is a double-edged sword. When executed well, it delivers confidence and conversion. But when operations break, long queues, unhelpful staff, unclear pricing, out-of-stocks, the experience turns shoppers away instantly.

Today's consumers are highly intolerant of friction. The same expectations they have online, speed, clarity, personalisation, are being transferred to bricks-and-mortar. Retailers who fall short in-store risk not only losing the sale but the Consumer's long-term trust.



16%
%

of respondents don't believe that Black Friday discounts are genuine

- 48% of Baby Boomers, 36% of Gen X, and 34% of Millennials feel Consumer service has worsened in the past year.
- Only 9% or fewer across all age groups believe it has improved.



- Top service needs during peak periods
- 30% want fast help locating items
 - <32% expect clear product knowledge

Planned, Omni-Channel Shoppers | Stores are crucial | Considerations

Early Deal Pursuit

- **SHOPPERS ARE READY** - Be ready 3–4 weeks out; have the “price to beat” 10–14 days out
- **WISHLISTS ARE BUILDING** - Own the shelf early: get into wishlists (see Page 17).
- **ENTICE & ENGAGE** - In-store ‘scoping’ will start early, teams need to be ready to hold the conversation on reasons to buy/plan to buy

Research-First Journeys

- **GET SHOPPERS PHYSICAL** - In-store is still important, the physical environment and product range is still a highly preferred method (#3)
- **STORE TEAM MESSAGING** - At such a noisy period, consideration for front line teams and their messaging to potential Consumers is key
- **CONFIDENCE TO STOCK LEVELS** - Store pages show stock status & queue forecasts

Wishlists & Carts

- **KEY MOMENTS TO WIN** - Wishlist retargeting and abandoned-cart Black Friday reminders with price-drop triggers.
- **BE BRAND STRONG** - Loyalty early-access windows; collect opt-ins with “unlock Black Friday preview”.

In-Store Friction Erodes Loyalty

- **ENGAGE WELL** - Deploy well-trained staff to high-traffic zones (entrances, popular departments).
- **KEY CATEGORY STRATEGIES** Use data to anticipate demand spikes for trending Black Friday categories, e.g., fashion, small appliances, and electronics among Gen Z and Millennials.
- **ASSURANCE IS KEY** - Use signage or staff talking points to explain why a deal is a good one (e.g., compare to regular pricing, or include a value breakdown).

THEME 3 - Value Wins the Basket

Store-wide **Simplicity**

Amid relentless inflationary pressure and cautious spending, Australians are demanding clarity over cleverness. The message from shoppers is unequivocal:

"Make it easy for me to see the value."

Complex tiered promotions, mystery offers, or convoluted "spend and save" mechanics are being rejected in favor of simple, sitewide discounts that are easy to understand and compare.



Site-wide percentage discounts are the clear winner across all generations, especially Gen Z (27%) and Millennials (25%), confirming that simplicity and transparency resonate most.



Free shipping is especially important to older shoppers, with Baby Boomers (23%) and Gen X (22%) rating it highest, likely reflecting a value-conscious mindset in these cohorts.

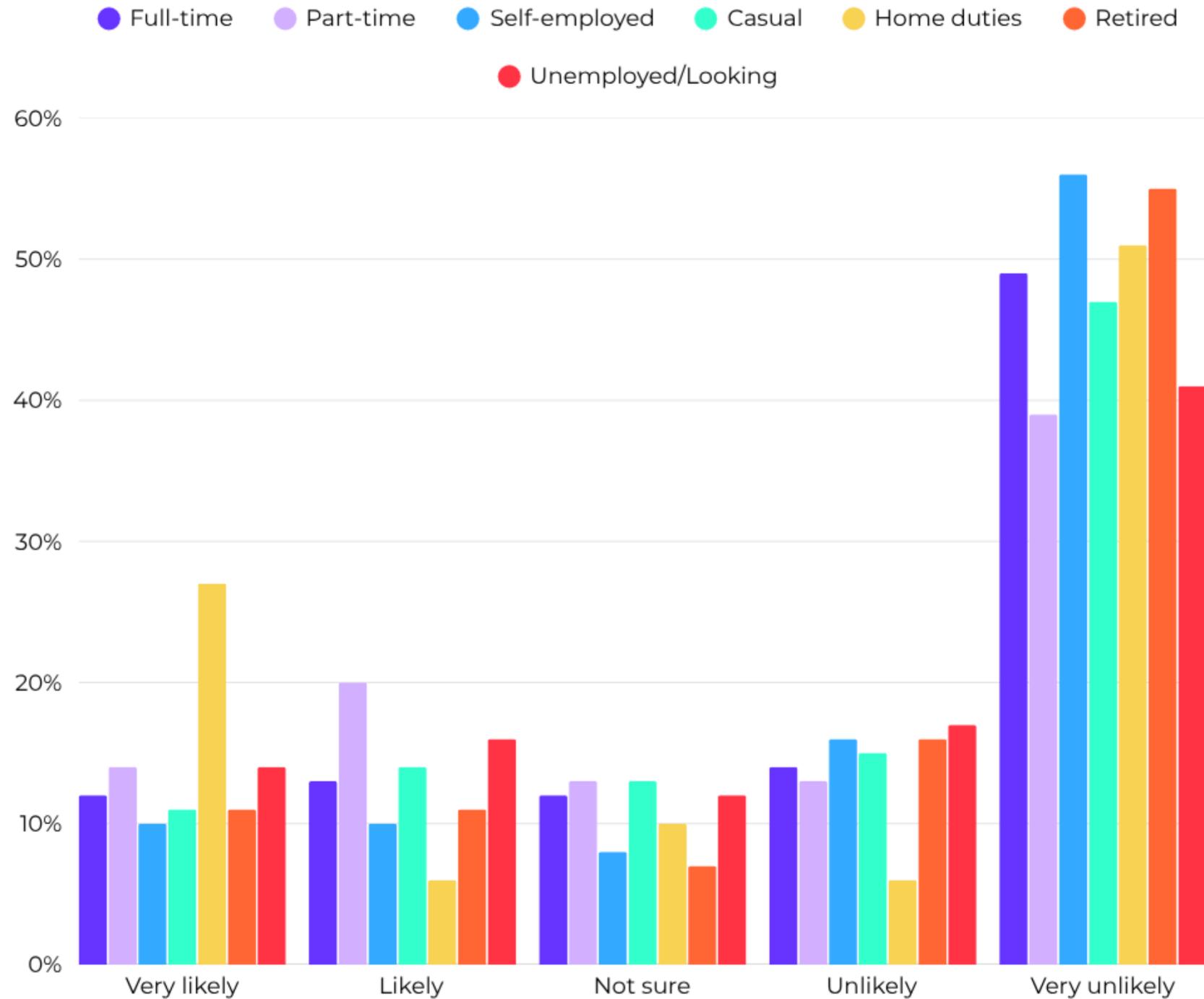


Flash deals and lightning sales have stronger appeal among younger groups, particularly Gen Z (17%) and Gen X (18%), pointing to a desire for urgency and excitement.

We asked our database **Most appealing Black Friday offers**



We asked our database based on their employment status **How likely are you to use a Buy Now Pay Later service?**



THEME 3 - Value Wins the Basket

BNPL's Selective Role

Once seen as a growth driver, Buy Now Pay Later (BNPL) services are now a fixture, but a mature one. Their role has shifted from enabling larger purchases to smoothing cash flow for predictable buys. As interest rates remain high and credit card debt rises, shoppers are using BNPL more conservatively.

What This Means: Retailers should continue to offer BNPL options, but not lean on them as conversion levers. Instead, BNPL should be treated as table stakes for a seamless checkout experience.



The majority of shoppers are unlikely to use BNPL, with 49% of Gen Z and Gen X, and 56% of Baby Boomers saying they are very unlikely to use it, highlighting broad caution across generations.



Millennials (25–44) are the most open to using BNPL, with 34% saying they are likely or very likely to use the service, suggesting it still plays a role in this cohort's payment toolkit.



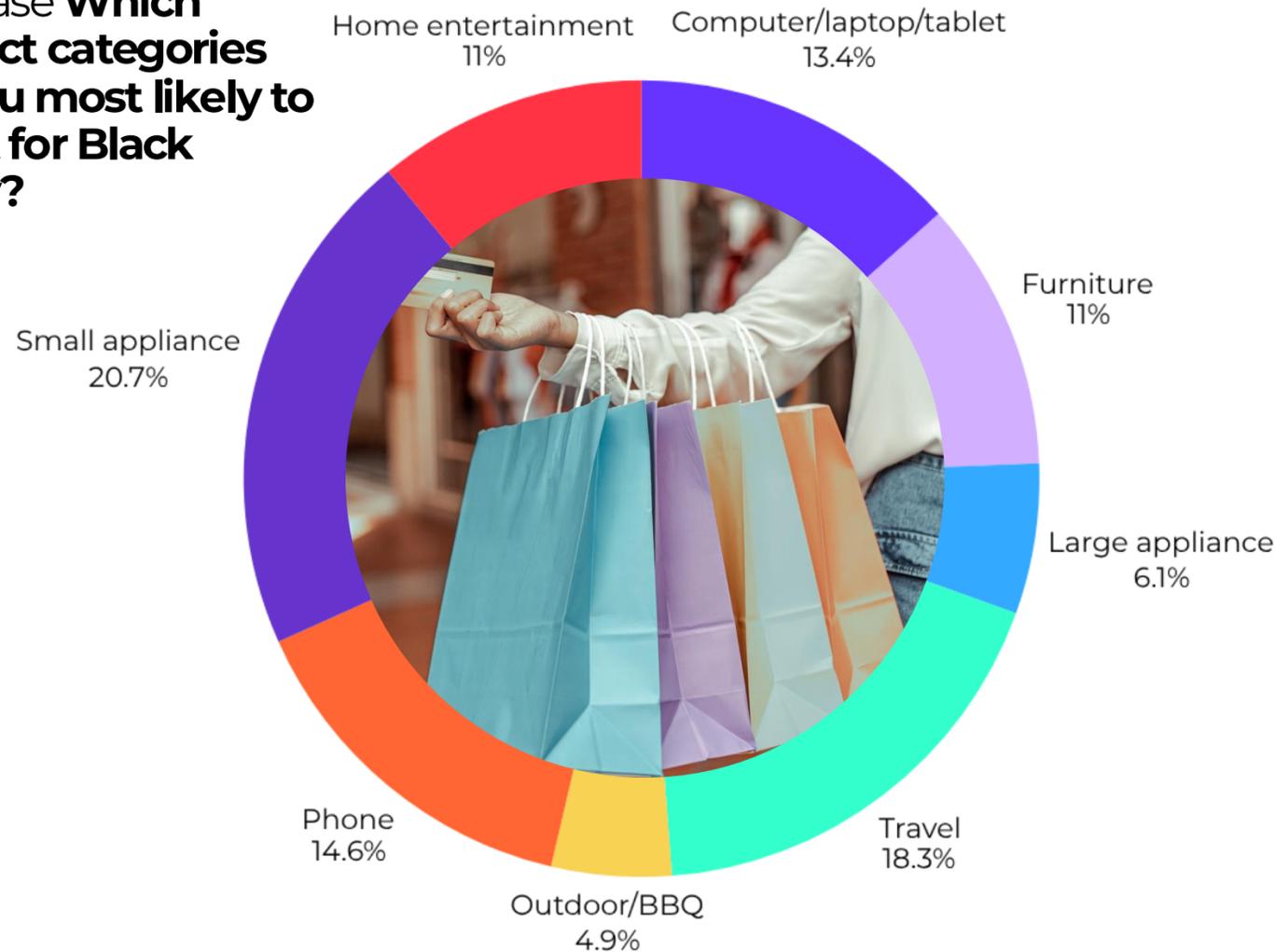
Across all groups, a significant share remains unsure, especially among Gen Z, Millennials, and Gen X (13%), indicating hesitance or indecision rather than outright rejection, a potential opportunity for education and reassurance.

THEME 4 - Category Missions Drive Trips

Category Missions Drive Conversion

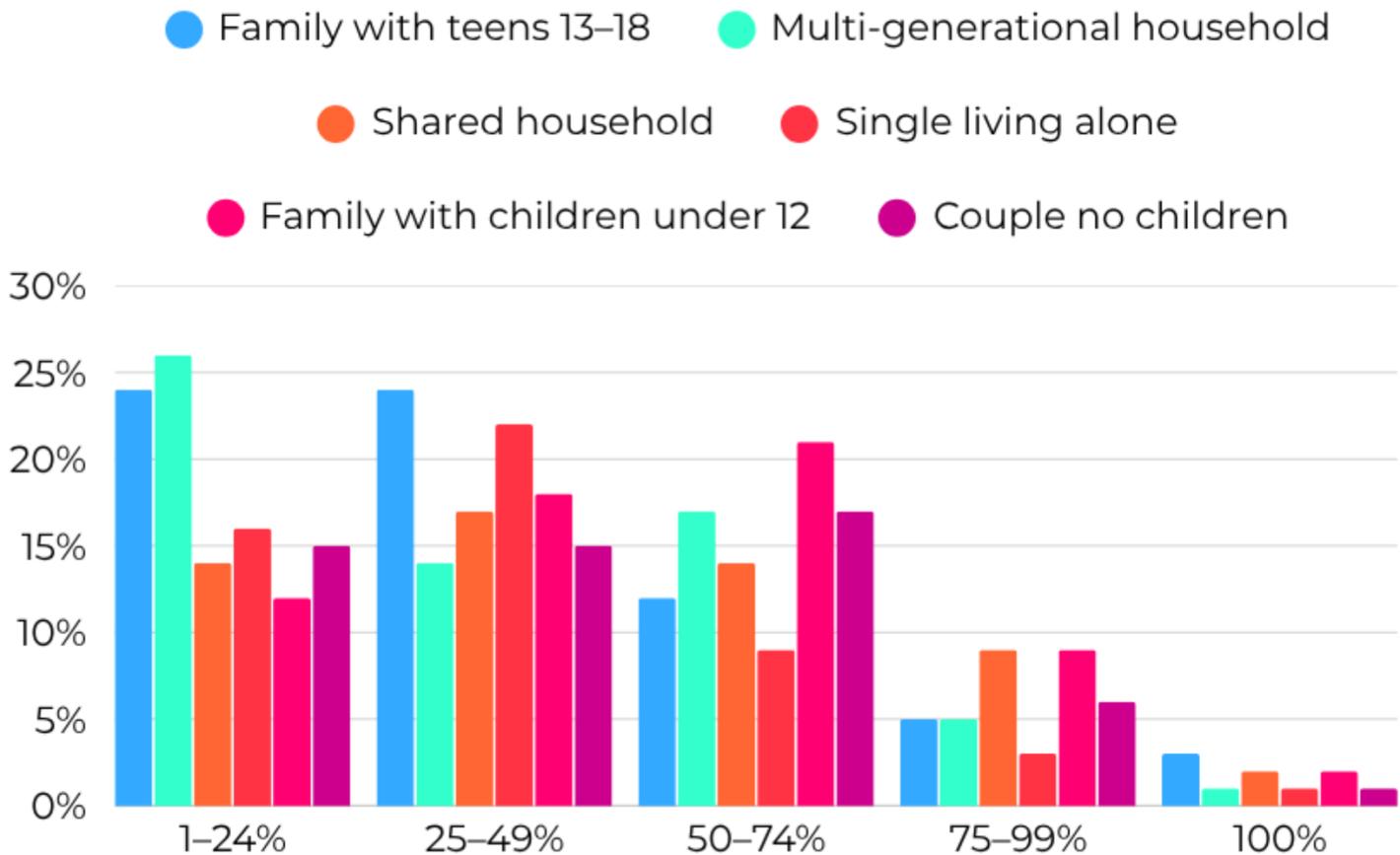
The opportunity is significant: shoppers who do choose to spend are highly intentional and are taking advantage of the dual pre-Christmas buying windows. Families

We asked our database **Which product categories are you most likely to target for Black Friday?**



We asked our database **What % of your Christmas shopping will you complete?**

51%



THEME 4 - Category Missions Drive Trips

Big-Ticket Caution, Selective Splurge

Black Friday 2025 isn't one event, it's a series of micro-missions. Shoppers come with intent, often anchored to specific product categories. These mission-driven behaviours make the role of category merchandising more important than ever.

15%

Purchases at \$1000+ are on the rise

15% of shoppers are waiting and anticipating to buy a big ticket item this Black Friday. Millennials and Gen Z are the most interested with cost-of-living and housing challenges at play



Fashion and beauty dominate among younger shoppers:

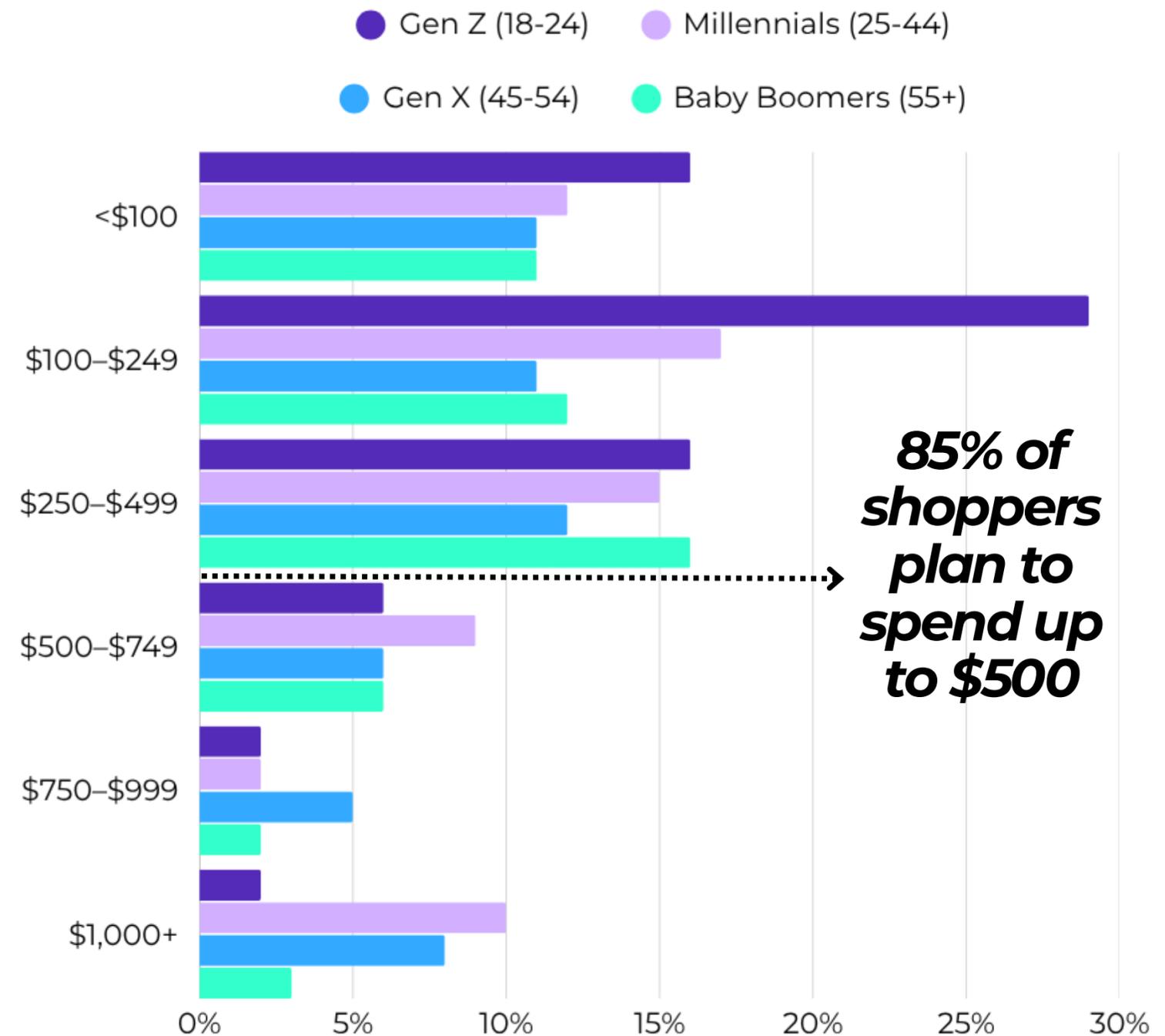
Gen Z leads with 22% targeting fashion & footwear and 15% for beauty & personal care, reflecting trend-driven, self-focused spending habits.



Electronics remain the universal draw card

Across Gen Z to Gen X, 16% consistently select electronics, showing broad appeal for tech deals during Black Friday.

We asked our database **What is your expected total Black Friday/Cyber Monday spend in 2025?**



Value Wins The Basket | Category Missions

Drive Trips | Considerations

Consumers are planning their trips around specific needs, not browsing. Retailers must optimise high-intent categories with clear navigation, availability, and promotions. Make mission-driven trips easy to complete to drive conversion and repeat visits.

Store-wide Simplicity

- **STORE-WIDE OFFERS** - Lead with clean %-off headline + free shipping thresholds.
- **VALUE FOCUSED** - Consumers are looking for simple and tangible offers for quality products - how can you leverage the sentiment "***Make it easy for me to see the value.***"

Big-Ticket Splurges

- **CLARITY OF SPECS** - Comparison grids for big-ticket (specs/benefits) + returns/warranty clarity.
- **AVAILABILITY + DELIVERY** - Stock visibility on big-ticket SKUs is important to assist in decision making

Gifting Peaks In Black Friday

- **ON SHELF VISIBILITY** - Gift finders by recipient/price (e.g., "Under \$50/\$100") and pre-bundled sets.
- **CHRISTMAS ASSOCIATION** - It's not too early to steal the December share of mind for gift giving

BNPL's Selective Role

- **GO-TO not MUST HAVE** - Keep BNPL available, but don't lead with it.
- **REASSURANCE TO ConsumerS** - Prioritise free shipping, straight % off, and risk-reduction (returns)

What this means for (insert client name)



Methodology & Sample Profile

This ShopperPANEL edition is based on a national survey conducted between August 6–15, 2025, with a total sample of 1,212 Australian consumers. Respondents were sourced from a nationally representative online panel and invited to complete a 10-minute survey on their shopping habits, motivations, and expectations ahead of the Black Friday and Christmas trading periods.

The survey design captured a broad cross-section of the Australian population, allowing for robust segmentation and trend analysis across several key demographics:

- **Age Distribution:** Respondents ranged from 18 to 65+ years, with balanced representation across six major age groups. This provides visibility into generational attitudes from Gen Z to Baby Boomers.
- **Location Type:** The sample was well-balanced geographically, with respondents from metro (51%), regional (46%), and remote (2%) areas. This distinction allows for nuanced insight into infrastructure-driven shopping behaviors (e.g., delivery access, store proximity).
- **Employment Status:** The majority of respondents were employed either full-time or part-time, with additional representation from students, retirees, and those not currently in the workforce, ensuring perspectives across life stages and income dependency.
- **Household Income:** Respondents reported household income levels ranging from under \$60,000 to over \$250,000, enabling trend analysis based on purchasing power and financial confidence.
- **Gender Identity:** The sample skewed slightly female (73%), with inclusive options for non-binary and self-described identities, reflecting growing diversity in retail audiences.

This rich demographic spread allows the ShopperPANEL to uncover deep behavioral and attitudinal differences, not just between groups, but within them, informing targeted retail strategy across Australia. No weighting was applied post-survey. All insights are drawn from raw respondent totals.



2026 and Beyond

Are you setup for a successful 2026?

If you require assistance in enhancing your sales and improving Consumer experience, please do not hesitate to reach out to us.

ShopperPANEL aims to offer an in-depth perspective on retail, particularly regarding the Consumer experience and the economic challenges that may affect the market share of Australian retailers.

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ShopperPANEL

EDITION 12 - SEPTEMBER 2025

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