

ShopperPANEL

EDITION 12

creative activation
CLEMENGER FIELD MARKETING

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

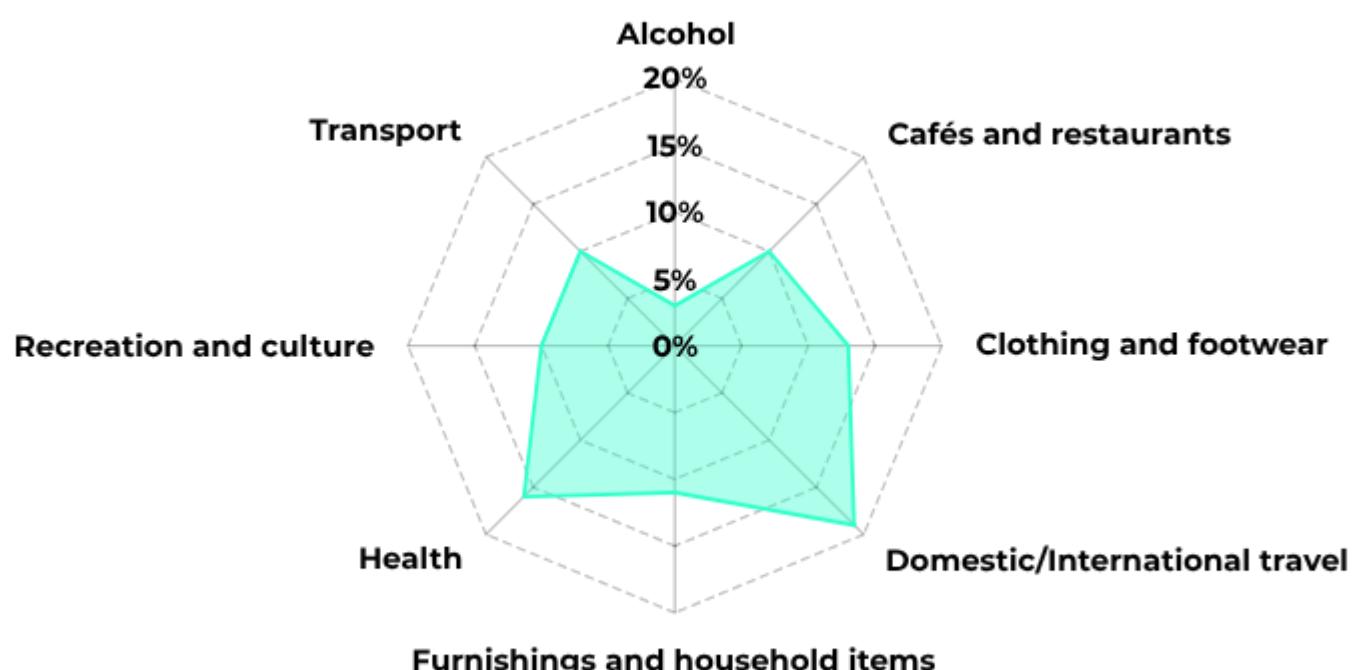
Baby Boomers (55+) are the most optimistic age group

+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

<\$500 Average Spend

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

Big ticket items for Black Friday

#1 Tech

#2 Travel

#3 Home



Shopper Sentiment and Trends At a Glance



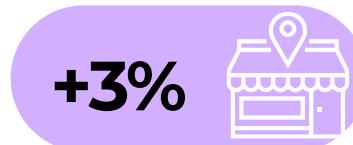
Shopping Behaviour

More online-leaning: Mixed online/in-store preference grew **(+2 %)**, while “mostly in-store” declined **(-2 %)**.



Service Expectations

Consumer-service satisfaction improved slightly **(+2 %)** while expectations climbed **(+3 %)**.



Physical Store Motivation

Immediate purchase matters more: “Need it now” ticked up **(+3 %)** while “touch/see product” softened slightly **(-2 %)**.



Digital Confidence

Online purchase confidence rose about **+45 %**, underscoring stronger comfort with e-commerce.



Spending Adjustments

Cutbacks: Dining out **(+3 %)** and clothing **(+2 %)** lead planned reductions. Growth: Travel **(+3 %)** and health/fitness **(+2 %)** categories continue to expand.



Social-Commerce Influence

Purchases from social-media links rose **+4 %**, showing stronger direct conversion from platforms.



Travel to Major Cities

Slight decline **(-3 %)** in trips to capital cities for shopping, reflecting better local/online options.



Stockouts

Shoppers are quicker to switch retailers when items are out of stock **(+3 %)**.



Buy Now Pay Later

BNPL usage increased **+4 %**, and for Black Friday purchases BNPL climbed **+3 %**.



Economic Outlook

Optimism improved from 29 % to 33 % **(+4 %)**, hinting at a modest lift in consumer confidence.



Fulfilment Preference

Home delivery nudged up **(+2 %)**; click & collect slipped slightly.

Consumer Outlook

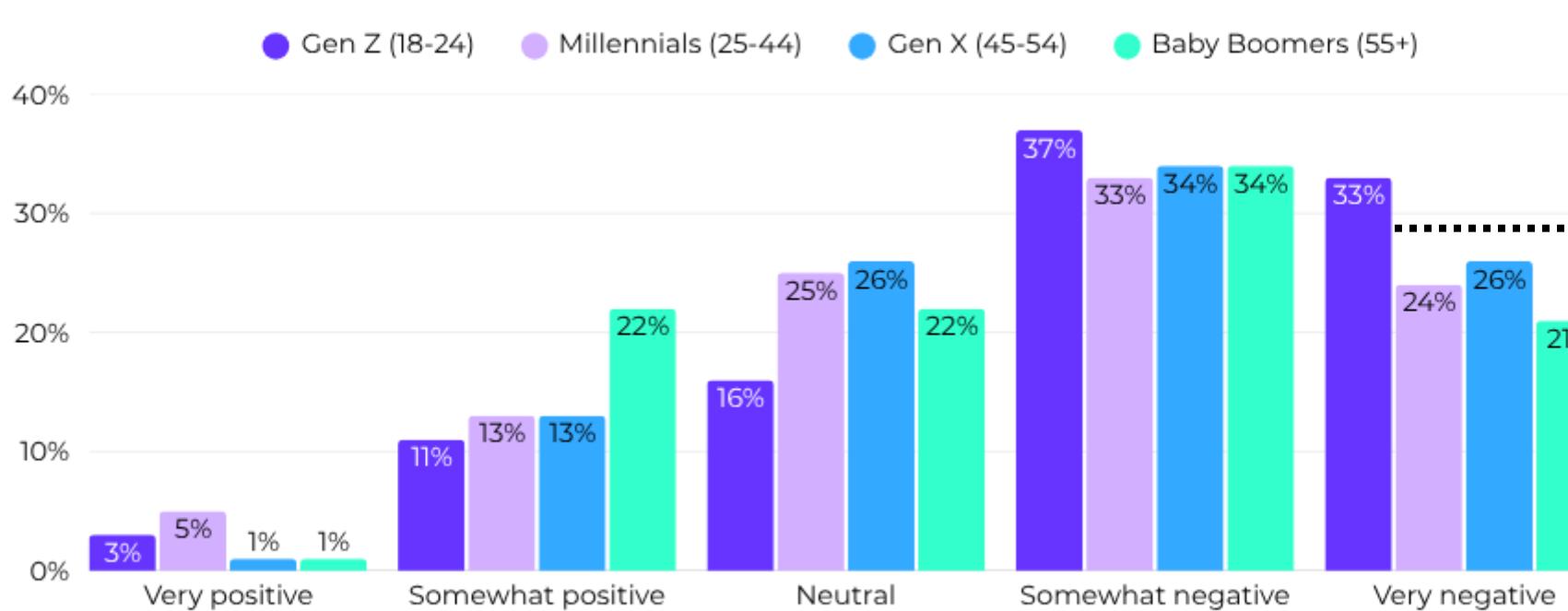
What's happening:

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.

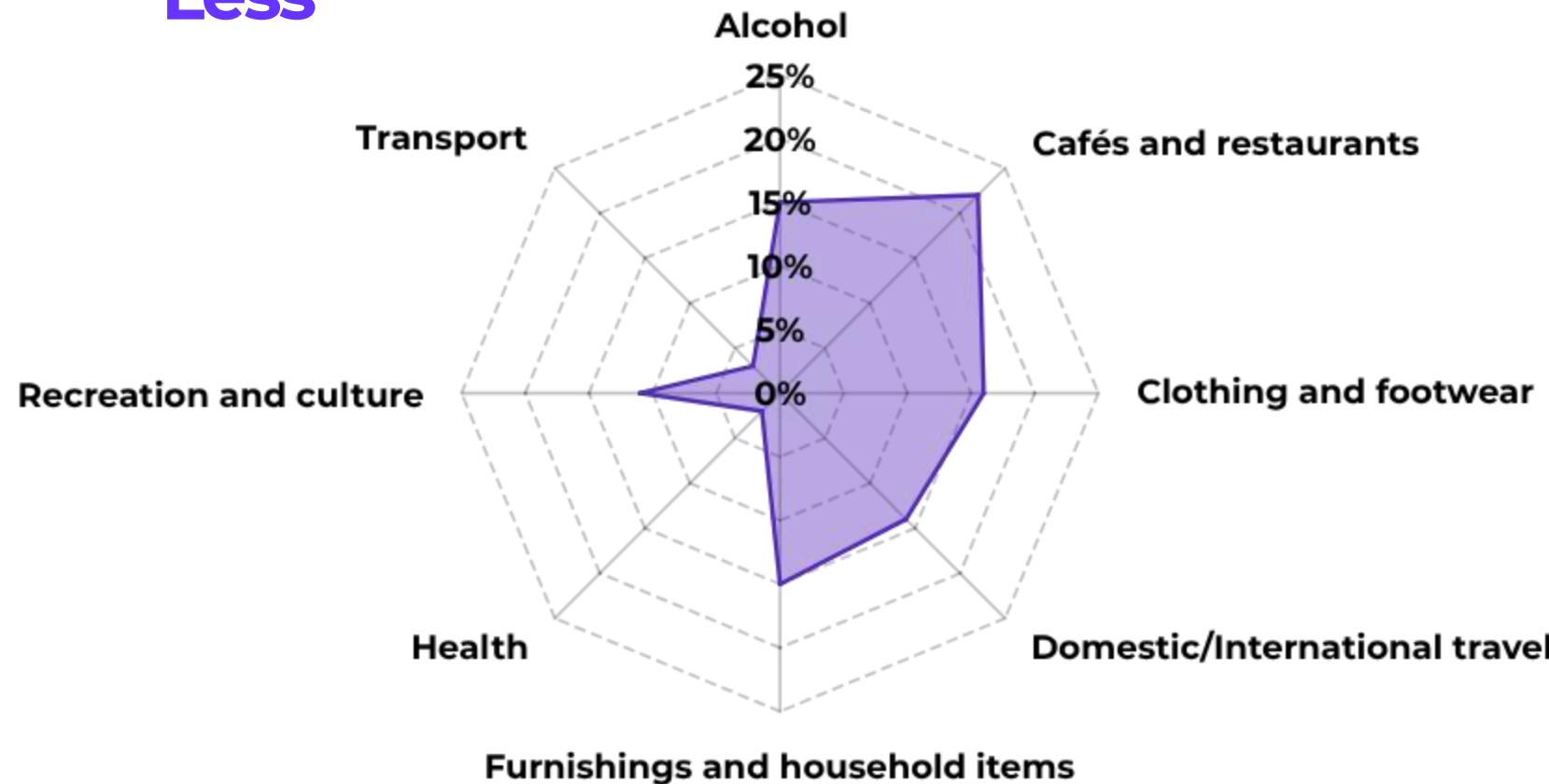
<\$60k
Lower-income earners / casual workforce are the least optimistic and likely impacted more heavily by cost of living pressures.

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

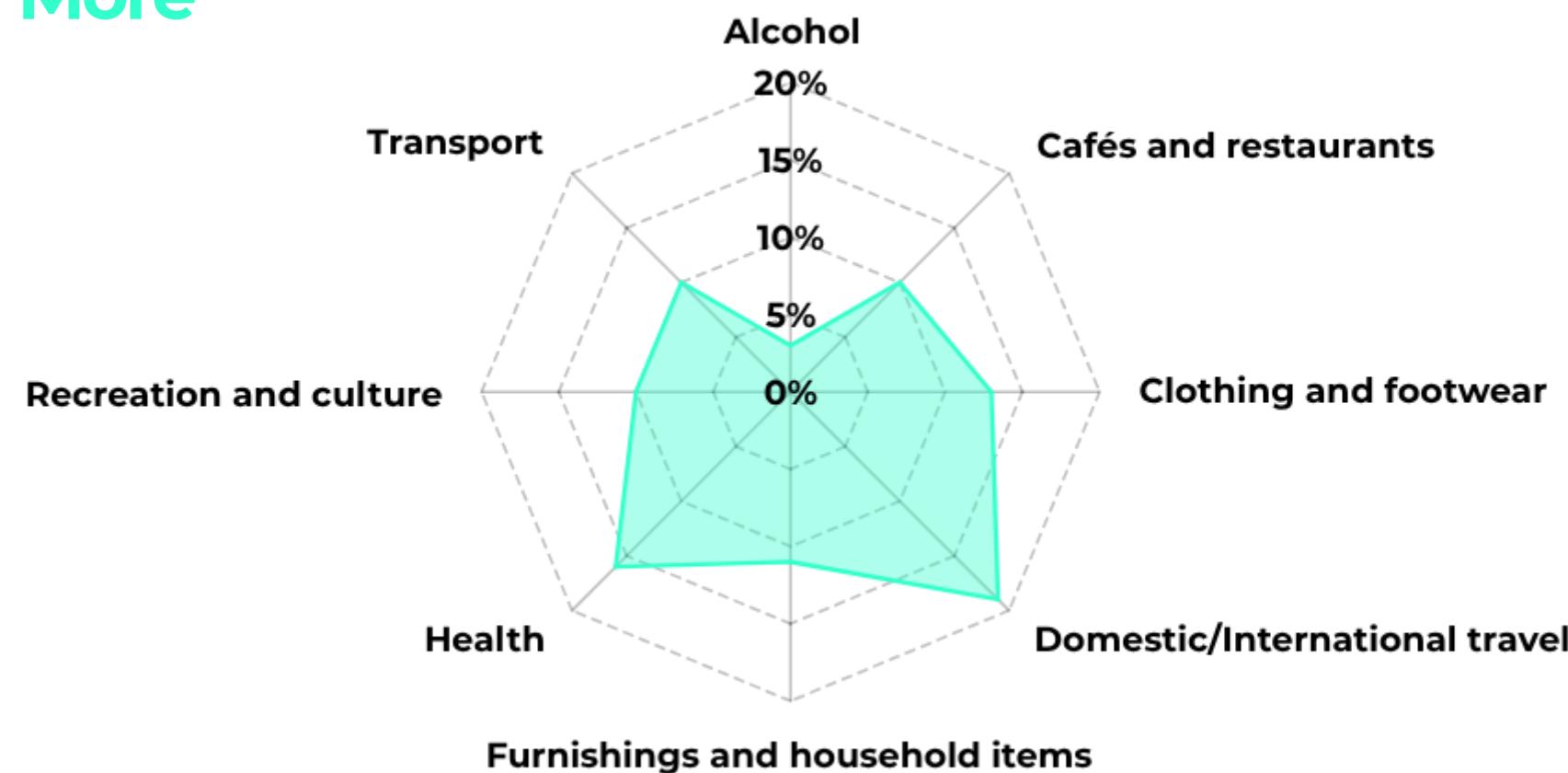
Consumer Cut Backs + Spending

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



Spending More



#1 Eating Out

#2 Fashion

#3 Home/Alcohol

#1 Travel

#2 Health

#3 Fashion

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.

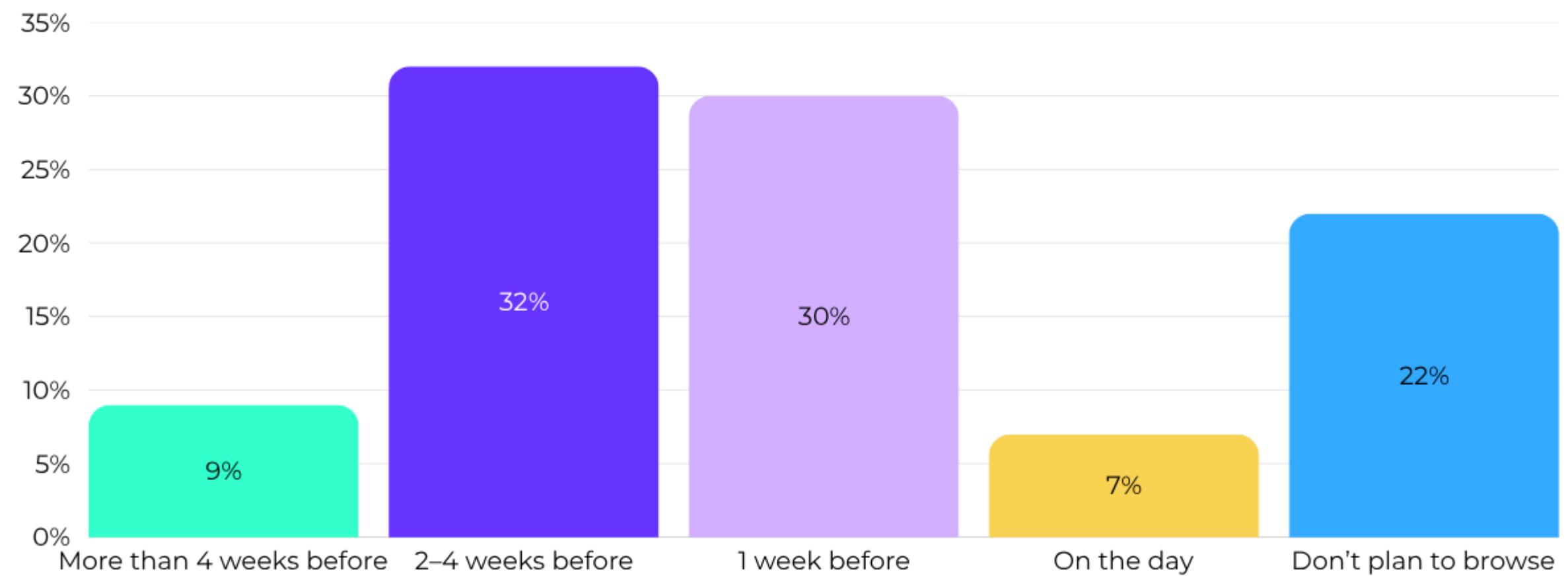
This shift is not just about bargain hunting. Shoppers are attempting to mitigate risk, ensuring product availability, assessing shipping timelines, and aligning purchases with real needs. As a result, the traditional Black Friday sales spike is now preceded by a 'pre-decision period' lasting up to a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



Wishlists & Carts

(Decided Before Deal Day)

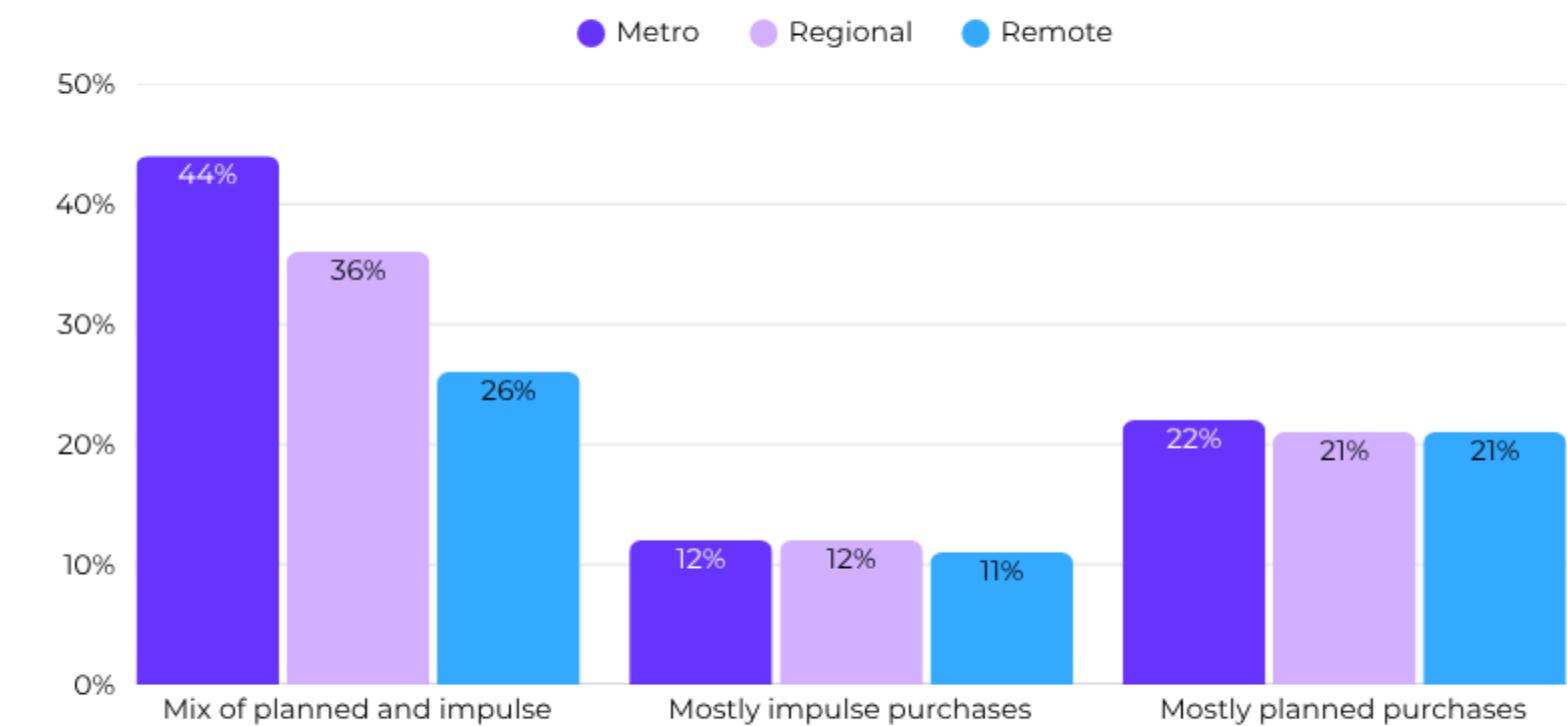
The myth of the spontaneous shopper is fading. In 2025, Black Friday isn't about impulse, it's about execution. Shoppers are building their baskets days or weeks before the sale begins. Many use tools like wishlists, shopping carts, and notification alerts to organise their purchases and act quickly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

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.

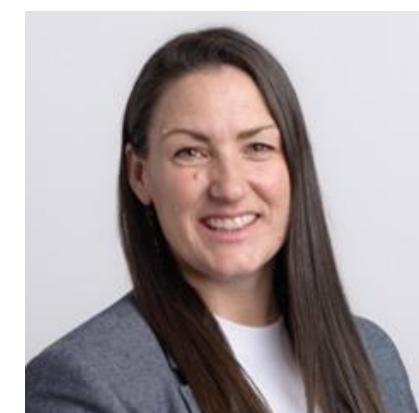
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