

ACRS

# Retail Review 2020

SPECIAL REPORT



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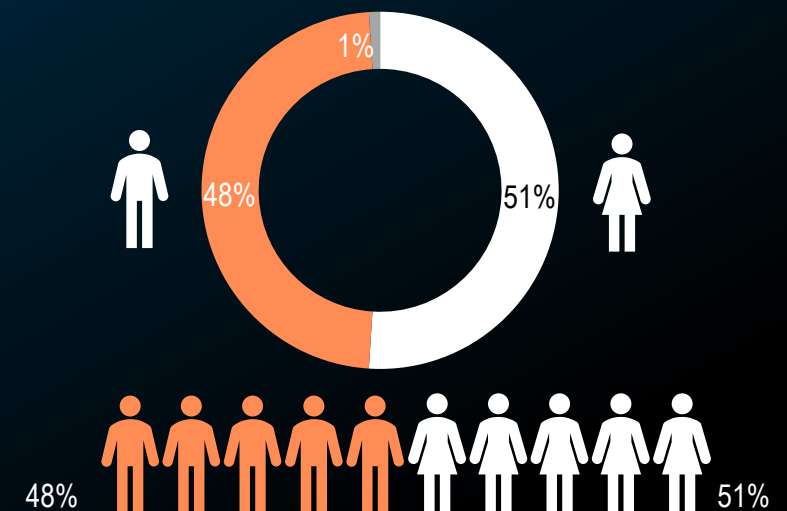
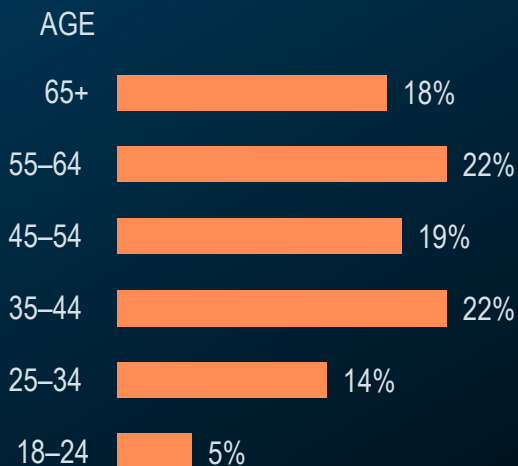
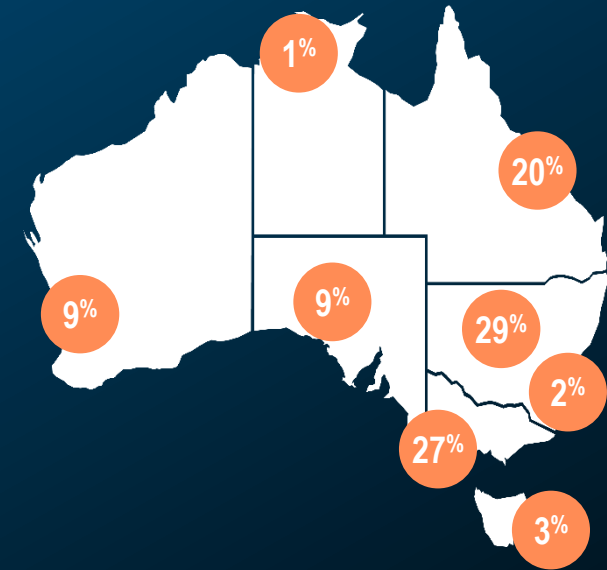
ACRS has been conducting a monthly shopper pulse investigating attitudes and behaviours towards retail in the context COVID-19.

From September to November 2020, we surveyed 4,647 shoppers from across Australia.

This special report reflects on Australian shoppers' experiences throughout the year and identifies key changes in people's behaviour and attitudes towards retail in 2020.

Trend data across  
**3 months**

n=**4,647**  
Australian  
shoppers



66%+

Australians turned to retail therapy during COVID-19. Whether browsing or purchasing, online or physical stores, more than two-thirds of shoppers (66%+) consistently reported that they felt moderately to a great deal happy, in control and a level of normalcy while shopping for non-grocery retail products.

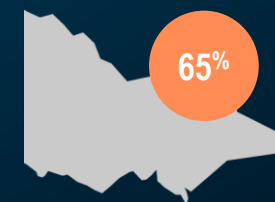
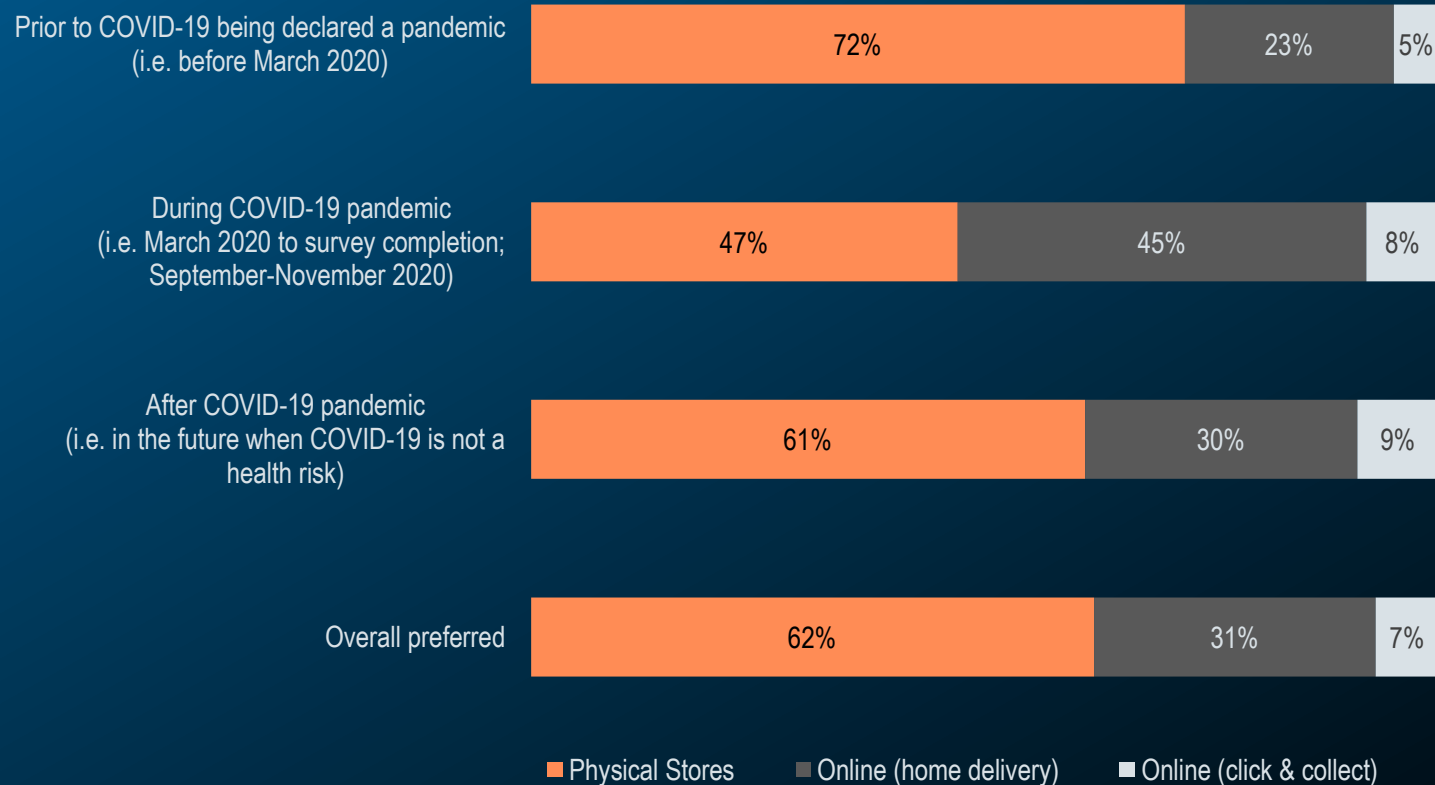
55%+

And over half of shoppers (55%+) consistently reported that they did not feel lonely, stressed or bored while shopping for non-grocery retail products.



## ONLINE BECAME THE MAIN NON-GROCERY CHANNEL DURING COVID-19 AND SOME PLAN TO CONTINUE USING THIS CHANNEL IN THE FUTURE

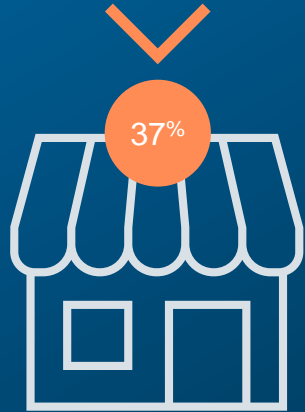
MAIN NON-GROCERY RETAIL CHANNEL



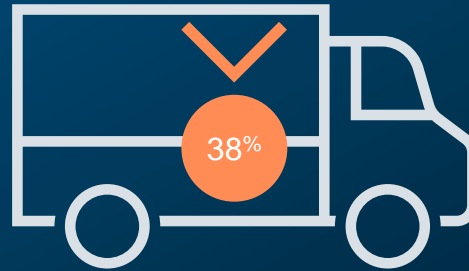
A higher proportion of Victorians switched to online (home delivery and click & collect) as their main non-grocery retail channel during COVID-19 (65%) due to mandated lockdowns and restrictions.

Conversely, a lower proportion of Queenslanders, Western Australians, and South Australians switched to online during COVID-19 (45%, 45%, and 43%, respectively).

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Shoppers reported that their retail experience at physical stores was somewhat to significantly worse than the previous year due to the effects of COVID-19 (37%), as was product availability at physical stores (48%).

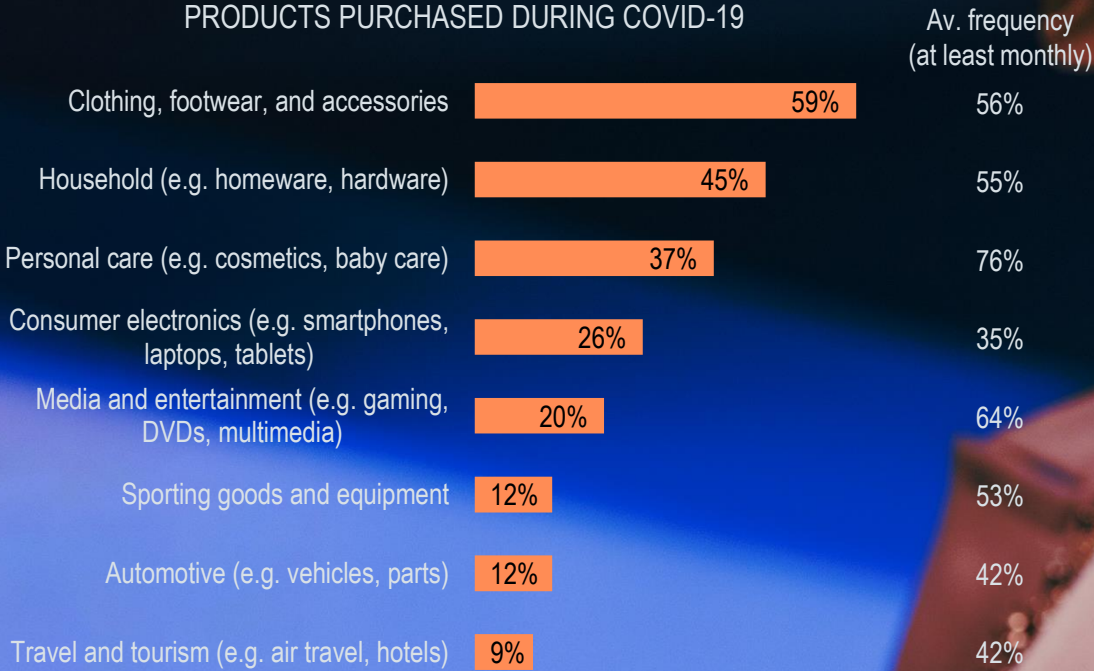


Delivery timings of online purchases were a pain-point during COVID-19 (i.e. March 2020 to survey completion; September-November 2020), with 38% of shoppers reporting that delivery times were somewhat to significantly worse than the previous year.



Overall, the retail experience of online shopping during COVID-19 (i.e. March 2020 to survey completion; September-November 2020) was viewed by shoppers as somewhat to significantly better than the previous year (25%), as was customer service online (21%).

# CLOTHING, FOOTWEAR & ACCESSORIES, HOUSEHOLD AND PERSONAL CARE WERE THE MOST PURCHASED PRODUCTS

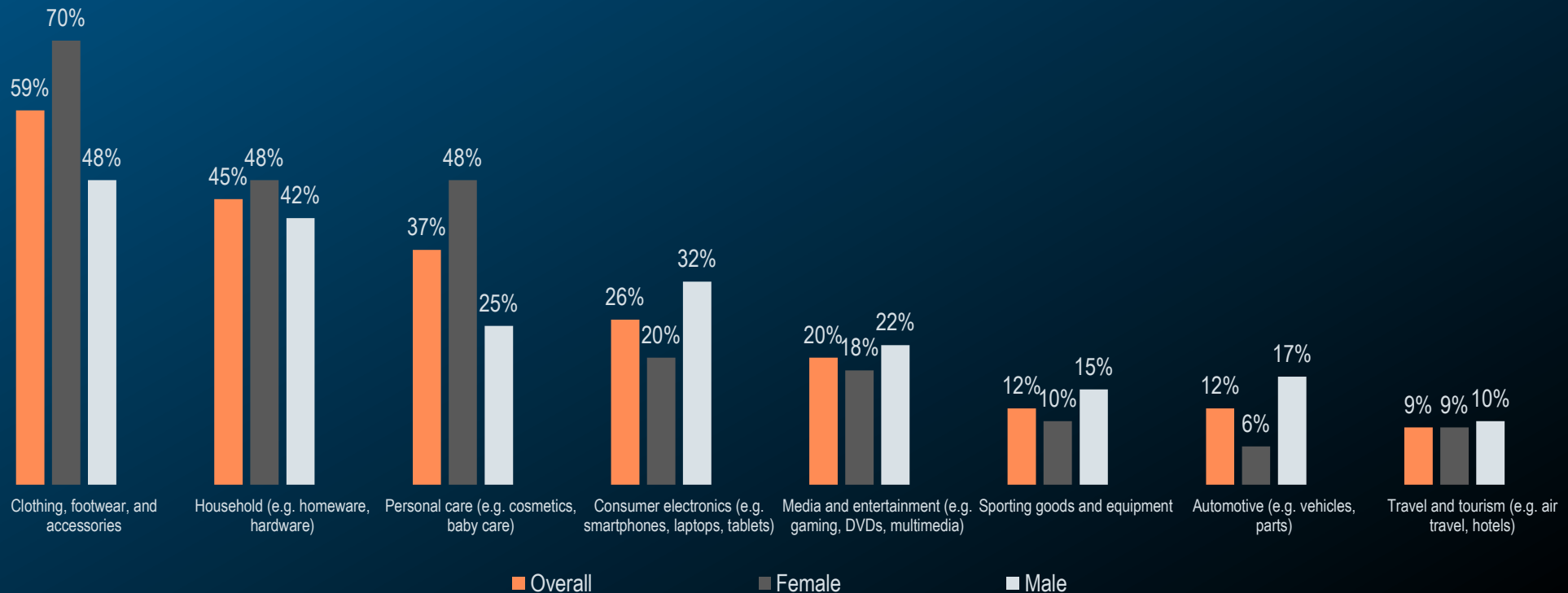


Note: This is a multiple choice question and responses may not sum to 100%.

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**FEMALES PURCHASED MORE OF THE TOP THREE PRODUCTS, WHILE MALES PURCHASED MORE CONSUMER ELECTRONICS, MEDIA AND ENTERTAINMENT, SPORTING GOODS AND AUTOMOTIVE THAN FEMALES**

PRODUCTS PURCHASED DURING COVID-19 BY GENDER



Note: This is a multiple choice question and responses may not sum to 100%.

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# 34%

of Australians stocked up/  
purchased more than usual\*  
groceries and related products



Shoppers primarily stocked up on *Canned goods and soups* (15%), *Toilet paper, paper towels and tissues* (14%), *Pasta, noodles, grains and sides* (13%), *Cleaning supplies* (e.g. *laundry detergent, dishwashing*) (12%), *Frozen foods* (11%), and *Soaps, sanitisers & general hygiene* (10%).

## AUSTRALIANS PRIMARILY STOCKED UP ON GROCERIES AND RELATED PRODUCTS MAINLY TO TAKE CARE OF THEIR HOUSEHOLD

### TOP THREE REASONS SHOPPERS STOCKED UP ON PRODUCTS

# 1

Shoppers wanted to ensure their family/household was taken care of

# 2

Shoppers expected disruptions for products to get to stores (i.e. supply chain disruption)

# 3

Shoppers expected to spend more time at home and needed/wanted appropriate product(s)

Note: This is a multiple choice question and responses may not sum to 100%.

\* Stocked up / purchased more than usual refers to buying specific product(s) that shoppers ordinarily purchase, but bought in greater quantities than usual because of COVID-19.

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## OUT OF THE ORDINARY PURCHASES



Clothing, footwear & accessories (22%); including *Casual/ loungewear* (12%) and *Sports clothing and shoes* (8%).



Personal care goods (22%), including *Face and body* (9%) and *Haircare* (7%).



Household goods (22%), including *Cooking, Baking, and Drinking appliances and products* (e.g. *rice cooker, coffee maker, bread maker*) (7%, 6%, and 6%, respectively).



Consumer electronics (19%), including *Laptops and tablets* (7%) and *Smartphones* (6%).



Media and entertainment (18%), including *Subscriptions to online movie and TV platforms* (e.g. *Netflix, Disney, Stan*) (8%).



Sporting goods and equipment (15%), including *Small and portable gym equipment* (e.g. *weights, exercise balls*) (5%) and *General sports equipment* (e.g. *balls, bats, clubs*) (5%).

## SHOPPERS PURCHASED A NUMBER OF OUT OF THE ORDINARY PRODUCTS DURING COVID-19 PRIMARILY BECAUSE IT MADE THEM FEEL GOOD

### TOP THREE REASONS SHOPPERS PURCHASED OUT OF THE ORDINARY PRODUCTS

1

It made shoppers feel good to buy these product(s)

2

Shoppers expected to spend more time at home and needed/wanted appropriate product(s)

3

Shoppers wanted to ensure their family/household was taken care of

Note: This is a multiple choice question and responses may not sum to 100%.

\* Made out of the ordinary purchase(s) refers to specific product(s) that shoppers would not have ordinarily purchased if it had not been for COVID-19.

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61%

of Australian shoppers expect to shop more for products that are locally produced.

58%

of shoppers expect to be more conservative in their spending.

66%

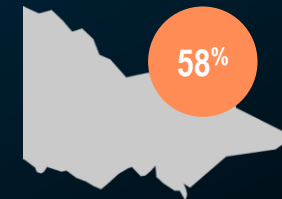
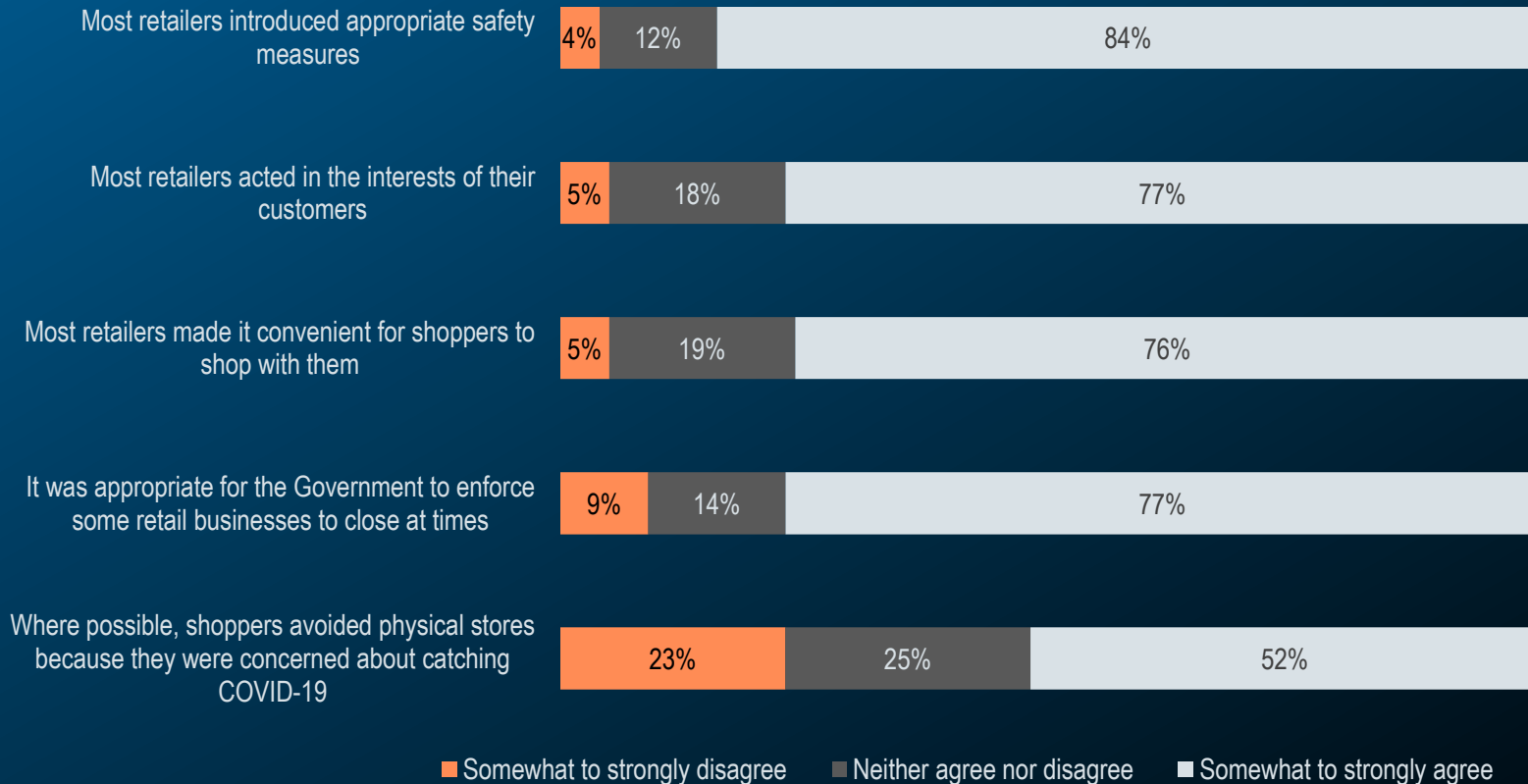
of shoppers expect to seek out sales or special deals in the future.



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## AUSTRALIANS AGREED THAT MOST RETAILERS INTRODUCED APPROPRIATE SAFETY MEASURES, ACTED IN THE INTERESTS OF THEIR CUSTOMERS, AND MADE IT CONVENIENT FOR CUSTOMERS TO SHOP WITH THEM

### RETAILER, GOVERNMENT, AND SHOPPER RESPONSES TO COVID-19



A higher proportion of Victorians avoiding physical stores where possible as they were concerned about catching COVID-19 (58%).

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