



BRIGHT DISPOSITION

AUTUMN WINTER 2015 CHRISTMAS & STATIONERY TREND REPORT

ALEXANDRA MILES
BRIGHT DISPOSITION LTD

This is a qualitative market research report on the 2015 Christmas and autumn winter stationery market in the UK. It will review the current retail climate, promotions and design trends during the autumn winter period - October 2015 to January 2016.

- PART ONE** looks at the Christmas papershop market and specifically trends across boxed Christmas cards, wrap and Christmas crackers.
- PART TWO** looks at autumn winter stationery promotions including Back to College and January sale and trends across fashion stationery and diaries.

CONTENTS

The current retail climate and summary of Christmas trading..... 4

PART ONE CHRISTMAS PAPERSHOP

AW15 Christmas Papershop Promotions and Trends..... 5

- WHSmith..... 6
- Paperchase..... 8
- Clinton Cards..... 10
- Card Factory..... 12
- John Lewis..... 14
- Debenhams..... 16
- BHS..... 18
- Next..... 20
- M&S..... 22
- Tesco..... 24
- Sainsburys..... 26
- Asda..... 28
- Morrisons..... 30
- Waitrose..... 32
- Aldi..... 34
- the Range..... 36
- Wilkinsons..... 38
- the Works..... 40
- B&M Retail..... 42
- Poundland..... 44
- 99p stores..... 46

AW15 Christmas Papershop Design Trends..... 48

- Winter Wonderland..... 48
- Red & White..... 50
- Nordic..... 52
- Vintage Santa..... 54
- Art Deco..... 56
- Contemporary Brights..... 58
- Tartan..... 60
- Animal Selfies..... 62

PART TWO AUTUMN WINTER STATIONERY

- AW15 Stationery Promotions and Trends..... 65
- AW15 Fashion Stationery 76
- 2016 Diaries..... 86

Report Conclusion..... 98

Appendix..... 99

THE RETAIL CLIMATE

It's all over for another year and as we plan for Christmas 2016 this report will highlight the key Christmas and Stationery design trends from 2015.

At the time of writing key retail trends were as follows:

- A mixed set of Christmas trading results from British retailers. John Lewis, Tesco, Sainsburys, Morrisons and Debenhams had better than expected results. Meanwhile Asda, Poundland and M&S reported disappointing results.
- Consumer footfall on the British high street was down but the online shopping trend continues to grow.
- Milder weather meant that there was little demand for winter clothing a key footfall driver. Heavy flooding in the north of England in December and heavy rainstorms across the country prevented people from shopping.
- Terrorist attacks in Paris in November led British consumers to avoid major shopping centres in cities due to security concerns.
- The online shopping trend grew massively with M&S online general merchandise sales growing by 20.9% and John Lewis online sales up by 21.4% representing 40% of total sales.
- Retail parks performed better than city centre locations due to the popularity of click and collect.
- Supermarkets (Tesco, Sainsburys and Morrisons) focused on price cuts on key grocery items, rather than promotional offers, improved product ranges, and customer service enticing some customers back from discounters Aldi and Lidl for their Christmas shop. Asda continues to fare badly with a 3.5% drop in sales.
- Lower prices for both food and fuel throughout the year have meant that the UK consumer has more disposable income.
- Consumer credit is at an all time high with November figures at their highest monthly level since 2007.
- Discounters have not fared as well with Poundland reporting 'disappointing' Christmas sales due to an oversaturated discount market and low high street footfall.
- High Street retailers continue to focus on product with the M&S Christmas trading statement saying that 'availability, ranging and design,' are key.
- Charity cards continue to remain popular with Which? publishing a report into 13 major retailers and the percentage of pack price they pay to charity. See appendix.



PART ONE

AW15 CHRISTMAS PAPERSHOP PROMOTIONS AND TRENDS

ALEXANDRA MILES
BRIGHT DISPOSITION LTD

AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

WHSmith

WHSmith have over 1300 stores in the UK and are still seen as a destination for stationery including Christmas product. Despite the red and green point of sale highlighting promotional offers they still lacked theatre in their stores over the Christmas period. Charity cards remain a focus and they fared well in a recent Which? report highlighting that they give between 10-20% of the pack price to charity and in the case of Children in Need 100%. There was a large choice of designs and price points across card packs. They had a 3 for 2 mix and match offer on all charity cards. All Christmas roll wrap and gift bags were on a 3 for 2 offer.

There was also an offer of a half price accessories pack when you buy any rollwrap.

Design themes: red and white Christmas, silver and blue snowflake, kraft foiled trees, photographic animals, traditional scenes, holly and foliage, traditional gold.



Gift wrap and accessories

- Wrap all £3.49 for 3m or £4.49 for 4m
- 3m X 70 cm character gift wrap £3.49
- 2m X 70 cm kraft luxury gift wrap with glitter £4.49
- Bottle bag £1.99
- Small bag £1.99
- Medium bag £2.99
- Large bag £3.99

Gift tags:

- 6 design tags with finishes for £1.49
- 10 plain foiled gift tags £1.49



Innovative merchandising in WHSmith with roll wrap displayed on shelves above hanging product in landscape display shippers.

Card packs

- 30 charity cards 3 designs £6.99
- 10 square charity cards 1 design £4.99
- 10 illustrated cards 2 designs £1.99
- 10 foiled cards 1 design £4.99
- 30 illustrated cards 3 designs £4.99
- 30 glittered cards 3 designs £5.99
- 20 charity cards cube 4 designs £3.99
- Paper house/ Almanac gallery 10 Christmas cards £6.99

- Majority of card range large square format £4.99



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

Paperchase

With over 130 stores in the UK Paperchase always has an innovative and original Christmas range. They tend to create their own trends, which then go on to influence the market. In terms of promotions they had a 3 for 2 on Christmas cards and 3 for 2 on selected roll wrap.

Design themes: Into the woods - illustrated stags/ owls/ deer/ polar bear, Globetrotter - London transport, Santa and friends travel the world, photographic penguin, photographic peas, kraft tree, kraft penguin, galaxy, gold star on kraft, neon, vintage classic, monochrome.



Card packs

- 3 for 2 on charity card packs 8 for £3.50
- 15 Christmas cards 3 designs £6
- 30 assorted charity cards £5.50
- 32 mini charity cards 4 designs £3
- 24 Christmas cards 4 designs £4.50
- 12 luxury cards 2 designs £6
- Five dollar shake 6 cards 1 design £8.50

Gift wrap and accessories

- 3 for 2 on gift wrap 3m £3.50 - £3.75
- 5m £5
- Small gift bag £2.25
- Medium gift bag £3
- Large gift bag £3.25
- Bottle bag £3

Crackers

- 6 Paperchase Christmas crackers £13
- 8 mini crackers £6.50



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

Clinton Cards

Clinton cards now has over 400 stores in the UK and is owned by the Schurman retail group. They differentiated their offer to their competitors with a boxed card offer, which was focused on the top end of the market and luxury finishes. POS emphasised a 'great value buy one get one 50% off' message across boxed cards and a 'buy one get one 50% off' message across gift wrap and accessories. They also stocked high end card brands such as Jolie paper, William Arthur, Crane & Co, and Moma alongside their own label Deco and Clinton Collection.

Design themes: Art deco, Vintage Santa, midnight blue, penguin characters, pug, photographic animals, traditional Christmas, red and white snowflake, tartan.



Card packs

•Opening price point £4 on 10 square charity cards in Clintons à la mode brand.

À la mode

- 15 small cards 3 designs £5
- 10 cards 1 design £5

Deco and Clintons luxury traditional cards

- 10 cards 1 design £5
- 10 cards 1 design £7
- 10 cards 1 design £10
- 5 luxury honeycomb cards £10

- Holiday cards from Jolie papier 10 cards £10
- William Arthur 10 cards £18
- Crane & co 10 cards £20
- Moma pop up holiday cards 8 cards £18

Gift wrap and accessories

- Simply Clintons £1.49 for Kraft wrap or 3 for £3
- 10 foiled gift tags 99p
- 6 luxury gift tags £1.50
- Clintons roll wrap £3 4m X 70cm
- Luxury collection £3 2.5cm X 70cm
- Jolie papier gift wrap £3 2.5m X 70cm
- Jolie papier 5 tags £1.50
- Christmas gift wrap set £6 - 4 X 2m roll wrap, 2 X 10m ribbon reels, 8 bows, 8 tags.
- Loose sheets paper £1.50

Gift bags by Collage

- Bottle £2
- Small £1.50
- Medium £2.50
- Large £3 to £3.50
- Extra large £3.50
- Giant bag £4



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

Card Factory

With 750 stores in the UK, Card Factory sell a wide selection of cards, gifts, gift bags, gift wrap, bows, ribbons, and balloons. The store visited in Birmingham was incredibly busy with Christmas POS highlighting a 'famous for value' message. Considering the small size of the stores there was a broad range of Christmas gifts, cards, wrap and accessories with product stacked and piled high in fsdus as well as being displayed on shelf.

Design themes: winter wonderland, traditional village scene, penguins and Santa, black and silver, bright stripe, foiled red in kraft, art deco, photographic animals - meerkat, seal cub, polar bear, tartan, nordic.



Gift wrap and accessories

- Medium gift bag 99p
- Large gift bag £1.29
- Extra large gift bag £1.49
- Giant gift bags 99p each or any 2 for £1.50
- Gift wrap set of 3 x 2m rolls £1.99
- Luxury gift wrap pack 2 X 2m rolls & 6 tags £2.49
- Roll wrap 3 metre wrap 3 for £1
- 3m foiled luxury gift wrap 99p
- 6 metre extra wide gift wrap 99p
- 6 gift tags 39p each or 3 for £1
- 22 assorted ribbons and curling bows 99p
- 24 small square hand crafted tags, 12 designs 99p
- 12 square hand crafted tags 6 designs 99p



Card packs

- Bumper packs of 30 and 50 stacked high
- 30 cards 5 designs £1.99
- 50 cards bumper value £1.99
- 20 cards 99p
- 10 hand crafted cards 99p
- 16 luxury cards 2 designs £1.99
- 12 deluxe cards £2.99
- 4 money wallets 99p



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

John Lewis

With 44 department stores across the UK, John Lewis had a whole Christmas department featuring Christmas Papershop and decorations in their new Birmingham Grand Central store.

Christmas POS in red and green stripes was dotted around the store to highlight Christmas ranges.
Product was not on promotion. John Lewis stocked a large selection of branded and charity cards.

Design themes: owls, traditional illustrated fruit, red and white stars, white and green mistletoe, gold hearts and Christmas motifs, eat drink and be merry stripe.

Card packs

•The largest variety of charity cards on the market with the following wide range of charities supported: NSPCC, Samaritans, RSPCA, British Heart Foundation, Marie curie care (Woodmansterne), Meningitis now (Caroline Gardner), Paper House charity Christmas, museums and galleries charity Christmas, Fair deal age UK: British Heart Foundation, National Autistic society, Multiple Sclerosis, Stroke.

- The collection charity cards 10 small square for £4
- Woodmansterne 5 for £4
- Caroline Gardner, RSPCA, Paper House charity cards 6 for £3
- Fairdeal charity 8 for £4.99

John Lewis branded:

- 24 charity cards £2.50
- 30 charity cards £3.50
- 5 handmade charity cards £5 - diamanté and laser cut finish
- Box 10 small square cards £4.00
- Box 10 large square cards £4.50
- 25 cards 5 designs £7.50
- 30 cards 5 designs £5

- Five dollar shake 6 cards £9
- Other card brands stocked: Quentin Blake assortment, Museums and Galleries, Ling Design, Paperhouse, Paperhouse Darkroom.

Crackers

- 6 fill your own crackers £5
- 6 crackers £12
- 12 crackers £20
- 24 fill your own crackers £4.50

Gift wrap and accessories

- 4 X 3m foiled wrap £6
- 3 X 3m design wrap plus stickers £7.50
- 3m wrap £3 and £4
- 10m wrap £4.50
- Mini gift bag £1.75
- Small gift bag £2.50
- Medium gift bag £3
- Gift tags £1.50 to £1.75 - pack size 2 to 8



Product to match the John Lewis Christmas man in the moon advertising campaign.



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

Debenhams

With over 178 stores in the UK Debenhams is best known for its fashion and home offers. The focus is on Christmas gifts rather than Papershop at Christmas with one of the largest gift ranges on the market. Card packs, crackers and roll wrap are sold around till points. There is a half price promotional message across cards, wrap and crackers.

Design themes: red and white stripe, Christmas brights, winter scene, traditional Santa, die cut Christmas tree, foliage, traditional red and gold.

Card packs

- 10 charity cards half price was £6 now £3
- 8 charity cards half price was £6.50 now £3.25
- 8 luxury Christmas cards £8 some half price to £4
- 8 luxury Christmas cards £6.50
- 5 luxury Christmas cards £6.50



Gift wrap and accessories

- Gift wrap 8 metre kids design was £4.50 now £2.25
- Gift wrap 4 metre was £4.50 now £2.25
- Gift wrap multipack 4 X 1.5m luxury gift wrap, 6 X decorative bows, 8 X gift tags, 2 X curling ribbons half price was £8 now £4

Crackers

- 12 luxury crackers with novelty, hat, motto and snap half price was £20 now £10



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

BHS

BHS has 171 stores in the UK and was sold by Philip Green to the Retail Acquisitions Ltd consortium in March 2015. Currently the stores look tired and dated but apparently there are plans for modernisation and new branding a foot. BHS is covered in this report as it has always been a destination for it's Christmas gift shop. Despite the depressing shopping environment they had a nice Christmas papershop range, with cards in particular being very trend led. In previous years they have planned to promote and at the time of the store visit - early December most of the range was on offer, with half price being the key promotional message. The store visited in Birmingham did not feel particularly Christmasy and promotional price points were written on point of sale, giving it a 'market' feel rather than a department store.

Design themes: Scottie dog, vintage santa, penguins, snowflakes, die cut Christmas tree, brights and stripes, traditional cream and gold, winter wonderland, black and silver.

Crackers

- All crackers £8
- 12 family crackers half price was £16 now £8
- 6 Luxury crackers was £16 now £8



Gift wrap

- 4m originally £4 reduced to £2.80
- 2m with finish half price now £2
- 5 gift tags £2 save 30% now £1.40
- Medium gift bag now £1.75 30% off
- Luxury gift wrap pack half price was £10 now £5 contains 4 gift wrap rolls, 4 bows, 2 ribbons



Card packs:

- All cards promoted at a £3 price point.
- 20 cards 3 designs half price now £3
- 10 cards 2 designs now £3
- 10 cards 1 design now £3
- 5 handcrafted cards 1 design now £3
- POS states than 25% of Charity card sales will go to the nominated charity.



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

Next

With over 500 stores in the UK & Ireland Next are known for being a fashion retailer selling quality fashion and accessories for men, women and children together with a full range of homewares. At Christmas time they sell a range of boxed cards and wrap around their till points. These ranges are well designed and usually tie into the latest homeware trends. Christmas theatre and point of sale in the stores visited was understated.

Design themes include: winter wonderland, foiled hearts on kraft, traditional gold and cream, illustrated Santa, purple and silver, art deco, nordic, characters in Christmas jumpers, Minions, Me to You Bear, Frozen, typography on kraft. There was a 3 for 2 mix and match across cards and wrap.

Card packs:

- 10 charity cards 1 design £3
- 12 charity cards 2 designs £5
- 20 charity cards 2 designs £4/ minions £4.50
- 12 charity cards 3 designs £4
- 20 frozen charity cards 4 designs £3.50
- 5 handmade charity cards 1 design £6

Gift wrap:

- 4 X 1.5m wrap multipack 2x10m ribbon, 4 bows, 8 tags £6.60
- 4m printed wrap £3.50
- 6m foil wrap £4
- 8m character wrap £3
- 2 X 1m glitter wrap £6 with 2m ribbon and 2 tags



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

Marks and Spencers

With 852 stores in the UK and a popular website, M&S definitely had the most theatrical Christmas campaign. The strapline was 'the Art of Christmas', which was lit up in lights on the side of their Marble Arch Store. There was a large investment in point of sale and visual merchandising with traditional red and gold pos that created a warm atmosphere in store with a hint of glamour through the use of gold.

A lot of attention was paid to visual merchandising in all stores visited. Wooden fixtures, baskets and presents created a homely atmosphere in store. Props were used such as an animated Reindeer in the Marble Arch Store. Customers were encouraged to have a Selfie with the Reindeer.

The overall promotional message was 3 for 2 across all stickered product - home accessories, gifts and decorations mix and match. Probably the strongest promotion on the market if buying gifts as well as papershop items.

Design themes included: winter floral, traditional fruit, vintage Santa, illustrated robin, foiled kraft, art deco, Christmas cats, snowflakes, tartan, glitter, photographic animals, elf, illustrated animals, midnight blue and silver, winter wonderland, bright neons with pom poms, traditional cream and gold.



Card packs:

- 24 cards 2 designs £5
- 24 cards 2 designs £5
- 30 cards 4 designs £4
- 8 cards 1 design £5
- 3D scene 4 cards 1 design £5
- Hanging keepsake 4 cards 1 design £5

Crackers:

- 12 family crackers £15
- 6 festive flippers £6
- 12 crackers £10
- 6 luxury crackers £19.50
- Elf portrait crackers 6 for £15
- Make your own Christmas crackers kit 8 for £6

Gift wrap:

- 3m foiled wrap £3.50
- 15 metres £7
- Wrap set tissue 4m and clear printed wrap 4m £6
- Wrap pack with accessories £8 - 2 wraps 1.5m, 2 ribbons 3m approx, 6 tags, decorative pom poms and confetti.
- Luxury gift wrap set 2 sheets 695x495mm, 2 tags, 2 present toppers, 2 1.5m ribbons, 8 stickers £8
- 6 foiled design tags £1



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

Tesco

With over 3500 stores in the UK, Tesco have improved their product offer and had a commercial and design led Christmas range.

Two bays of cards and wrap were on sale in larger stores from early October. The full range of Christmas cards and gifts launched on 1st November (after Halloween). Space in the power aisle was mainly given to Papershop cards and wrap. Christmas POS is understated: Bus stops are snow flakes on a beige background with red text. Headers are photographic. A 3 for 2 promotion runs across boxed cards, wrap, bags, tags & accessories.

Design themes: vintage Santa, glitter reindeer, red and white Rudolf, penguin, knitted robin, foiled tartan, holly wreath and traditional foliage, illustrated Santa, typography on kraft, white and silver snowflake.



Card packs:

- 6 luxury charity cards £4
- 10 luxury charity scene with diamanté/ tab ons £4
- 10 charity cards 2 designs £2.50
- Cube of 20 cute charity cards £1.50
- 30 charity cards 6 designs £2
- 30 Disney Christmas cards 4 assorted designs £2
- 24 charity cards £4

Gift wrap, bags, tags and accessories

- Small gift bag £1
- Medium gift bags £1 - £1.50
- Large gift bags £1.50 - £2
- Bottle bags £1 - £1.50
- Tags 6 pack for 70p
- 4m wrap £2
- 10m kids wrap £2
- 3m luxury wrap £2
- 3 sheets tissue £1
- Frozen roll wrap 4m £2
- Frozen medium gift bag £1.50

Crackers

- 12 Family crackers £4



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

Sainsburys

Sainsburys' now has over 1200 supermarkets and convenience stores and a new pricing and promotional strategy for 2015 focusing on regular lower prices rather than promotions.

Sainsbury's do a great job of bringing lots of different product categories across papershop, gifts and clothing together into one Christmas range.

POS is traditional with a green background with white text and Christmas trees containing LED lights. The Christmas strapline is 'Christmas is for sharing.'

Generally the store feels very Christmasy and Christmas gift and papershop range creates a warm and browseable shopping environment.

A 3 for 2 promotion runs on by Sainsburys boxed cards, roll wrap, tags, wrap accessories and bags.

Some trend led and traditional design stories. **Design themes included:**

Photographic deer, white star and snowflake, Christmas jumpers, knitted Santa, Christmas gnome, Happy holidays, red etched stag, cream and gold snowflake, red glitter merry Christmas typography, Santa's reindeers on kraft background, foliage, deer.

Kids designs: Penguin/ sprouts/ snowman/ gnome.



Card packs:

- 8 Christmas cards value pack £1
- 20 pack cube £1.50
- 30 cards 3 slim designs £2.50
- 12 charity cards £2.50
- 50pk bumper pack £2.50
- 20 cards 4 small designs £4
- 6 luxury charity cards £4

- Majority of card range is made up of 12 charity cards format.
- Finishes on luxury cards: flitter, tab ons, laser cut, printed envelopes, ribbons.



Gift wrap

- 4m wrap £2
- 8m wrap £3
- Wrapping set: 4 X 1.5m wrap/ 8 bows/ 2 ribbons £5
- Gift bags £2 and £2.50
- 8 gift tags £1
- 3 sheets tissue paper £1
- 6 X 4m ribbon £2



Crackers

- 6 mini luxury £5 reduced to £3.33 week before Christmas
- 6 pack racing game £6
- 6 dinner crackers £7 reduced to £4.66 week before Christmas
- 6 luxury crackers £10 reduced to £6.66 week before Christmas
- Tom Smith crackers £10
- 12 family crackers £4



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

Asda

With over 525 stores in the UK Asda are famous for the theatre they put around their promotional campaigns. This year was no different with Christmas music playing from launch on 1st November, twinkly flashing led lights and floor stickers.

POS was photographic with hashtag slogans eg. #because it's Christmas, she'll be made up, gifts all round, for the man who has everything.

13 bays was given to Christmas Papershop in the store visited in Coventry.

Design themes: winter wonderland, silver snowflake, typography on foiled background, photographic animals, christmas characters in hats, tartan, foliage, traditional cream and gold, neon spots and stripes, art deco, red and white, vintage Santa.

Card packs:

- 15 mini cards 2 designs 50p
- 20 cards 2 designs £1
- 15 hand crafted cards square £2
- 6 pack luxury design £4
- 20 frozen cards 4 designs £2
- 3 for £5 promotion on single cards



Gift wrap and bags:

- 3 x £2 5m gift wrap rolls for £5
- 5m gift wrap £2
- 8m gift wrap £1
- 10m kids gift wrap £1
- Gift tags 10 for £1 or 5 styled gift tags for £1
- 24 gift tag pack for £2
- Bottle bag 80p
- Small bag £1
- Medium bag £1.50
- Large bag £1, £1.50, £2



Crackers:

- 8 musical whistle crackers £6
- 6 racing game crackers £6
- 6 luxury crackers £8
- 8 premium crackers £5
- 12 family crackers £3



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

Morrisons

With 500 stores, Morrisons had a large Christmas range of 28 bays, mainly focused on food gifting. However they did have 5 bays of Papershop product in larger stores. Some Christmas product was on display from early October but the majority of the Christmas range launches after Halloween. The POS colour scheme is green and gold - gold text and imagery (reindeers and santa sleigh) on a green background.

Design themes: Foiled red and gold, silver snowflakes, brights with typography, Kids: owl, Santa and rudolf, traditional gold, illustrated woodland animals, white die cut, photographic animals in hats.



Card packs:

- 24 charity cards £2
- 24 Christmas cards 2 designs £2
- 30 bumper pack assorted £2
- 10 square charity cards £1
- 5 hand finished charity cards £4
- Majority of range 10 pack charity cards
- Hand finished 5 pack charity cards £4 - 3D and flittered

Gift wrap and bags:

- Luxury Santa sack £2
- 4m wrap £2 each or 2 for £3
- Gift bags and bottle bags £1 each or pack of 5 red and gold bags £2.50
- 10 pack gift tags £1
- 6 pack foiled ribbons £1
- 25 gift bows £1
- 3 sheets tissue £1

Crackers:

- 6 luxury crackers £8
- 12 family crackers £4



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

Waitrose

With over 322 stores in the UK, Waitrose started to launch their Christmas range at the beginning of November using both seasonal shelf space and fsdus.

Christmas POS around the store was in a green and white colour scheme featuring flying reindeers and hanging parcels. There was one bay of cards in the store visited, rollwrap was displayed in fsdus around the store and crackers were given over 3 metres of prominent selling space both in the seasonal area and near to the till points. They had one of the best Christmas cracker ranges on the market.

A 3 for 2 mix and match promotion ran on boxed cards.

Design themes - winter words and stars - white and gold, kraft wrap with typography, tartan, traditional holly wreath, nordic kids character scene, let it snow typography on kraft, red and white snowflakes, traditional gold and cream.



Card packs

- 10 charity cards £3.50
- 5 hand finished cards £5
- 8 hand finished cards £5

Gift wrap and accessories

- 4m gift wrap £3
- 4m foil gift wrap £3.50
- 10m kids wrap £3.50
- Bottle bags £1
- 4 sheets design tissue paper £1.50
- Essential Waitrose 10 foiled tags £1
- 8 design gift tags £1

Crackers

- 6 mini crackers £5
- 6 racing reindeer £10
- 6 kraft crackers £15
- Essential Waitrose 12 crackers £5
- 8 foiled crackers £20
- 8 crackers with photo booth kit £10
- 6 crackers with trivia quiz £15
- 6 luxury white crackers £25
- 12 crackers £15
- 12 crackers £20



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

Aldi

With over 500 stores in the UK, Aldi had a traditional Christmas cards and wrap range. Product was displayed in metal bins and fsdus. As much space was given in store to gift wrap accessories as to Christmas cards. There was a small range of novelty Christmas crackers. Roll wrap was displayed in fsdus around the store. The roll wrap range was made up of traditional designs, kids licensed designs and gift wrap sets.

POS was traditional with a burgundy background with white text and illustrations. The strapline was 'all your favourite things for Christmas'.

Design themes: holly wreaths, tartan, typography, snowflakes, Avengers, Frozen and Disney.



Gift wrap and accessories

- 5 metres kids licensed roll wrap from International Greetings 99p - Avengers, Frozen and Disney
- 4 metre foil wrap 99p
- 5 metre metallic gift wrap £1.69
- 8 metre gift wrap 99p
- 10 metre gift wrap 99p
- Gift wrap set £2.99 containing 4 x 1.5m wrap, 8 decorative bows, 8 tags, 2 x 10m ribbon rolls.
- Jumbo gift bag - Disney princess and Mickey Mouse £1.99
- 5 luxury bottle bags £2.99
- 5 luxury assorted gift bags £2.99 5 available designs
- 3 script metallic markers 89p
- 20 peg card holders £1.99
- 24 assorted gift tags 89p
- 6 money wallets 89p
- 15 sheets printed tissue 89p
- 24 mini gift tags 89p
- Gift wrap ribbons & bow set 3 foiled ribbons 9 bows 89p
- 3 rolls assorted fabric ribbon each 2m £1.29



Card packs

- 30 mini Christmas cards 2 designs 99p
- 15 square Christmas cards 2 designs 99p flittered
- 30 assorted Christmas cards 3 designs £1.99
- 8 luxury charity cards 2 designs £1.99
- 5 luxury charity cards 1 design - flitter and ribbon tab on £1.99
- Free standing fsdu for boxed cards
- No single cards

Crackers

- 8 luxury Christmas crackers £9.99
- 6 Game crackers £2.99



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

The Range

With 40 stores, stocking 65,000 products the Range had a large Christmas department stocking decorations and Papershop items. Christmas POS was traditional red and white headers and shelf edge strips.

Design themes: photographic animals, traditional Santa, traditional illustrated robin, neon reindeers, woodland animals, Disney Princess, typography on kraft, typography on black, red and white typography, tartan, Minions, winter wonderland, traditional village scene, festive teddy bear, illustrated Christmas characters in hats.



- Card packs**
- 32 mini cards school pack £1
 - 20 cute cards £1
 - 24 traditional cards £1.99
 - 30 humour cards £1.99

Gift wrap and accessories

- 8m cute wrap £1
- 4m Spiderman wrap £1
- 4m jolly holly Christmas wrap £1.99
- 3m wrap £2.49
- 2m deluxe wrap red/gold glitter £3.49
- Gift bags 69p to £1.99 for jumbo bag.

Crackers

- 10 crackers £3.99
- 6 luxury crackers £7.99



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

Wilkinsons

With 375 stores in the UK Wilkinsons had a large Christmas gift and papershop range with several design themes. Christmas POS was red, white and green with the strapline 'Stocking up for the Best Christmas.'

There was a 3 for 2 mix and match promotion across wrap and card packs.

Design themes: red and white stripes, illustrated stag, foiled tree on kraft background, tartan, kids snowman, kids penguin, kids Santa, owls, photographic wildlife, baubles.

Card packs

- 20 small Christmas cards £1.50
- 15 Christmas cards £2
- 16 luxury cards £3

Gift wrap and accessories

- Gift wrap 3 for 2 mix and match
- 5 metre foiled wrap £2
- 12m wrap £2
- 6 bottle bags £2.50
- 6 gift bags various sizes £2.50
- Bottle bag 80p
- Small gift bag 50p
- Medium gift bag 80p
- Large gift bag £1
- 8 gift tags 70p - 85p
- Jumbo gift bag £1
- Wrap accessory pack 30 metre ribbon and 6 bows £1
- 25 gift bows £1



Crackers

- 8 luxury crackers £10
- 12 crackers £4, £5, half price £10 to £5



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

The Works

With over 300 stores in the UK the Works had a traditional Christmas Papershop range. The strapline to the Christmas campaign was 'Christmas for less at Santa's gift shop.' Hanging banners and shelf edge strips highlighted this message throughout the store. Cards and wrap were under the Winterworks brand. Roll wrap was on a buy one get one free promotion.

Design themes: holographic foiled colours, traditional gold and cream, neon typography, Christmas character, nordic red and white, traditional holly, traditional village scene, photographic robins and kittens, Scottie dog, penguins in scarves.



Card packs

- 8 Christmas cards £1
- 10 luxury cards £1



Gift wrap and accessories

- 10m value roll wrap £2
- 2.5m holographic wrap £2
- 4m Disney wrap £2
- 3m gift wrap £1
- 3m extra wide gift wrap £2
- 12 design gift tags £1
- 10 sheets tissue paper 3 designs £1
- 50 wrap accessories pack £3



Crackers

- 6 luxury crackers £7
- 8 musical whistle £7
- 10 Christmas crackers £10
- 8 mini crackers £1
- 10 family crackers £4
- 4 game crackers £3
- 6 minions crackers £5



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

B&M Retail

B&M has 450 stores in the UK. The stores were lacking in atmosphere over the Christmas period partly due to their size and bright lighting. There was also no Christmas specific POS, although there were large stacks of Christmas crackers and roll wrap and gift bags around the store.

Design themes: winter wonderland, penguins on kraft, postboxes, Christmas pudding, teddy bears, traditional cream and gold, gold and black, brights typography, Frozen.



Card Packs

- 30 foil Christmas cards £1.99
- 40 humorous/ traditional cards £1.99
- 50 bumper cards £1.99, 10 assorted designs
- 2 money wallets 2 for £2 or 59p each

Gift wrap and accessories

- Luxury foil wrap set £10 reduced to £4.99
- 4 X 1.5m rolls, 2 x10m ribbon cobs, 4 X luxury bows.
- 5m X 1m extra wide wrap 99p
- 12 metre kids roll 99p
- 3 metre kids roll - Disney 99p
- Bottle bags 2 for £1 or 59p each
- 3 holographic bottle bags 99p
- 2 medium gift bags 89p
- 1 large gift bag 79p - 99p
- Character Bumper bags 79p each or 2 for £1.50
- Frozen bumper bags £1.99
- 40 luxury gift tags 99p
- 50 foiled gift tags 99p
- 150 adhesive gift tags 99p

Crackers

- 10 luxury crackers £3.99
- 12 Frozen / Minions crackers £2.99
- Giant cracker £2.99



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

Poundland

With over 600 stores in the UK Poundland had a broad Christmas range covering decorations and papershop. The strapline for the campaign was 'Christmas costs less at Poundland.'

Design themes: Christmas jumper, winter wonderland, bright typography on kraft, white and red foiled, traditional robin, nordic red and white, illustrated Santa.



Gift Wrap and accessories:

- 3 for £1 on 3m gift wrap
- 10m gift wrap £1
- 5m extra wide kids licensed - Simpsons, Frozen, Thomas licenses £1
- 3 small gift bags £1
- 6 money wallets £1
- 2 bottle bags £1
- 1 large luxury gift bag £1
- 2 extra large gift bag £1
- 2 giant gift sacks £1
- Giant gift bag £1
- 25 assorted bows £1
- 30 gift tags £1
- 50 gift tags £1

Cards

- Boxed Xmas cards buy 1 get 1 half price, 40 in pack
- 12 luxury Christmas cards £1
- Single cards £1 each

Crackers

- 6 Christmas crackers containing hat, joke and gift £1



AW15 CHRISTMAS PAPERSHOP CAMPAIGNS

99p stores

99p stores has over 250 stores in the UK and was recently taken over by Poundland. Despite this it traded a different range to Poundland. Product and design themes were more traditional. All Christmas product was on 3 for 2. Point of sale was red and white with the strapline '99p Christmas Shop.'

Design themes: pug, kitten, robins, winter scene, kraft typography, knitted Christmas, knitted teddy bear, penguin, Santa, traditional gold leaves.



Card packs

- 12 Christmas cards 2 designs 99p
- 10 large luxury Christmas cards 99p
- 20 mini Christmas cards 99p

Gift wrap

- 2m foiled wrap 99p
- 4m extra wide 99p
- 10m gift wrap 99p
- 3 frozen rolls 1.5m each 99p
- Large gift bag 99p
- Jumbo gift bag 99p
- 10 curling ribbons 99p
- 4 money wallets 99p
- 6 honeycomb gift tags 99p
- 12 glittered gift tags 99p
- 24 luxury gift tags 99p
- 96 assorted gift tags 99p

Crackers

- 8 mini crackers 99p
- 10 mini crackers 99p



AW15 CHRISTMAS PAPERSHOP DESIGN TRENDS

Winter Wonderland



Clockwise from top page 48: Asda, Card Factory, B&M Retail, Waitrose, BHS, Sainsburys.
Clockwise from top page 49: Sainsburys, Asda, M&S, Poundland, M&S.

AW15 CHRISTMAS PAPERSHOP DESIGN TRENDS

Red and White



Clockwise from top, page 50: Debenhams, Sainsbury's, Poundland, Sainsbury's.



Clockwise from top, page 51: M&S, Waitrose, Wilkinsons, Waitrose, Waitrose.



AW15 CHRISTMAS PAPERSHOP DESIGN TRENDS

Nordic



Clockwise from top, page 52: 99p stores, Sainsburys, BHS.

Clockwise from top, page 53: Sainsburys, Morrisons, Waitrose, Waitrose, Next.

AW15 CHRISTMAS PAPERSHOP DESIGN TRENDS

Vintage Santa



Clockwise from top page 54: BHS, Clinton Cards, BHS, BHS.

Clockwise from top page 55: M&S, Asda, M&S, M&S.

AW15 CHRISTMAS PAPERSHOP DESIGN TRENDS

Art Deco



Clockwise from top, page 56:
Sainsburys, Aldi, Next, Clinton
Cards.

Clockwise from top, page 57:
M&S, Asda, Next, Sainsburys.



AW15 CHRISTMAS PAPERSHOP DESIGN TRENDS

Contemporary Brights



Clockwise from top page 58: Card Factory, BHS, Card Factory.

Clockwise from top page 59: Debenhams, John Lewis, Morrisons, Asda.

AW15 CHRISTMAS PAPERSHOP DESIGN TRENDS

Tartan



Clockwise from top page 60: Sainsburys, Boots.
Clockwise from top page 61: BHS, Asda, Aldi, Clinton Cards.

AW15 CHRISTMAS PAPERSHOP DESIGN TRENDS

Animal Selfies



Clockwise from top, page 62:
Asda, M&S, Clinton Cards.

Clockwise from top, page 63: WHSmith,
M&S.





PART TWO

AW15 STATIONERY PROMOTIONS AND TRENDS

ALEXANDRA MILES
BRIGHT DISPOSITION LTD

AW15 STATIONERY PROMOTIONS AND TRENDS

The Bright Disposition 2015 Back to School Market Research Report highlighted the key design trends in fashion stationery for Back to School 2015 and the key promotions over the Back to School period. It's fair to say that AW15 has not seen a lot of promotional activity in the marketplace in stationery categories with retailers mirroring the general trend in general merchandise to protect margins and run little or no promotional activity.

Back to College

The majority of retailers who took part in the Back to School promotional campaign did not run a specific back to college campaign and simply continued their back to school offers on.

Two supermarkets did run a specific Back to College campaign in 2015 - Tesco and Asda.

The Tesco 'Off to Uni' campaign featured two bays of stationery in the power aisle. Product categories featured were notebooks, filing, branded pens and a small selection of branded accessories. Promotions were run across Pilot Frixion, Bic Cristal and Staedtler Noris pencils and ballpoint pens. There was an Oxford Campus bundle deal on a notebooks and filing essentials pack priced at £7 reduced from £20.

The Asda offer featured 2.5 bays of stationery, a mixture of Asda own label product and brands including Elba, Nu, Sharpie, Uniball, Pilot, Staedtler, Zebra, Papermate, Bic and Stabilo. Some branded pens formed part of a 2 for £3 offer.

Staples continued their Back to School promotional offers with a change of POS highlighting their student discount. Rymans and WHSmith also flowed through Back to School promotional offers.

Paperchase was the only retailer to launch a specific Back to College fashion stationery range, which they called Unicycle.



AW15 STATIONERY PROMOTIONS AND TRENDS

New Product for AW15

Following on from Back to College some retailers introduced new fashion stationery ranges, 2016 diaries and new craft items and increased the space given to seasonal items such as gold and silver pens, tapes, adhesives and post and packaging. Most retailers did not have big range changes for AW15. A summary of new product is below by retailer:

WHSmith - new Laura Ashley black and gold fashion stationery range, 2016 diaries and calendars. Brightly coloured notebook and filing product flows through from Back to School.

Tesco - four new fashion ranges, addition of 2016 diaries and calendars into core range space, core notebook ranges flow through from Back to School, new kids craft ranges. Shipper for Christmas essentials - tapes and adhesives.

Sainsburys - three new fashion stationery ranges, new 2016 diaries, new Frozen kids craft range, additional gold and silver pens. FSDU for post and packaging filled with Nu product. Shipper for Christmas essentials - tapes and adhesives.

Asda - very little change to core range. Diaries displayed in fsdus. Shipper for Christmas essentials - tapes and adhesives.

Morrisons - addition of some diaries but most product flows through from Back to School.

Waitrose - little change to core stationery range.

John Lewis - branded fashion ranges flow through from spring summer, addition of diary range and some new Christmas novelty stationery product. Sellotape is displayed in prominent till point locations.

Paperchase - exit from back to school and back to college fashion ranges and addition of 5 new fashion stationery ranges, new fashion notebooks and diaries.

Ryman - addition of new fashion notebooks and diary range.

Staples - addition of 2016 diary range.

Wilkinsons - one new fashion stationery range and new 2016 diary range displayed in range space.

B&M retail - addition of 2016 diaries into range space.

FSDUs and Shippers

Seasonal items such as sellotape and blu tack sell in huge volumes over the Christmas period and are often sited in shippers in key selling space. Price points over the Christmas period are very competitive and are compared by retailer in the table below:

December 2015 pricing	Sellotape original gold 24mm x 50m	Sellotape Promotional Offers	Blu tack original	Blu tack Promotional Offers
Tesco	£1.50	promotional roll - Sellotape original gold 24mm plus 5m festive roll for £1	£0.95	
Asda	£1.00		£1.00	
Sainsburys	£0.90	reduced from £1	£0.90	reduced from £1
WHSmith	£2.49	2 for £3	£2.49	buy one get one half price
the Works	£1.00		£1.00	
Wilkinsons	£1.00			
John Lewis	£1.50			



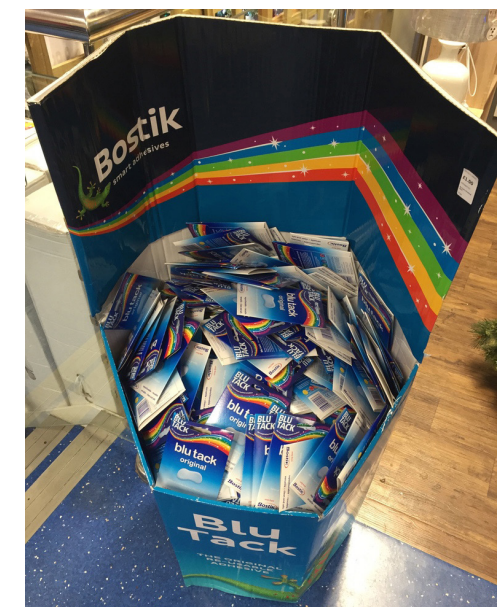
Sainsburys



Asda



Tesco



Bostik blu tack shipper in the Range, B&M Retail and 99p stores. Above Sellotape shipper in the Range.

AW15 STATIONERY PROMOTIONS AND TRENDS



Sainsbury's packaging essentials fsdu containing Nu mail products.



Packaging promotional offers in WHSmith:

- 2 for £5 on Scotch pop up dispensers and refills
- 2 for £5 on sellotape hand dispenser and refills
- Buy one get one half price on Scotch magic tape
- Buy one get one half price on blu tack
- Buy one get one half price on Command strips
- 3 for 2 across WHSmith brown paper, bubble wrap and kraft bubble bags.

Christmas Stationery and Arts and Crafts

- Christmas card making remained niche. Although there were big ranges in both Hobbycraft and the Range, this was not an area of focus for supermarkets or the high street.
- Tesco featured a decoupage range and had a specific kids Go Create Christmas craft range.
- Waitrose also had a make your own Christmas craft range, merchandised with Christmas decorations.
- Sainsbury's gave a bay of stationery range space to licensed Frozen and Disney Princess craft gift sets. They also featured products to decorate your own Christmas decorations and gift boxes on feature tables in larger stores.
- Adult colouring remained a key trend with Waterstones and Ryman's giving it front of store space.



Tesco - Get Creative Christmas range



Christmas Craft Decorations in Sainsbury's



Waitrose - Make Your Own Christmas Decorations

AW15 STATIONERY PROMOTIONS AND TRENDS



Frozen and Disney Princess stationery and craft gift sets in Sainsbury's.



Adult colouring books in Waterstones



Adult colouring books in the Works

AW15 STATIONERY PROMOTIONS AND TRENDS

January sale 2016

As with Back to College this year's January sale promotion was a bit of a non event for the stationery industry. In previous years the return to school, college and work in January was seen as a mini back to school. This year however there was definitely less promotional activity in retail perhaps as a result of new promotional pricing rules. Three retailers made an event of selling stationery as part of a January sale offer - Paperchase, Asda and WHSmith. Paperchase sold through autumn winter fashion and Christmas ranges at promotional prices no doubt to clear space for new spring ranges, which they usually launch in January. WHSmith featured a 3 for 2 across coloured stationery - notebooks and filing, branded pens and accessories. They didn't market this as a sale as such. Asda had a bay of stationery in their 'Home essentials' event with individual reductions on selected lines of stationery.



Asda brands include: Casio Calculator, Helix cool curves, Westcoast titanium scissors, Staedtler stationery set, Staedtler pencils, Papermate Inkjoy, Sharpie markers, Zebra Z-Grip, Bic Cristal, Pilot student pack, Pilot Frixion, Bic soft click, Post-it notes and page markers, Stabilo boss highlighters, Elba files and punch pockets, Pukka lever arch files, Pukka refill pads, Xerox, Pritt Stick.

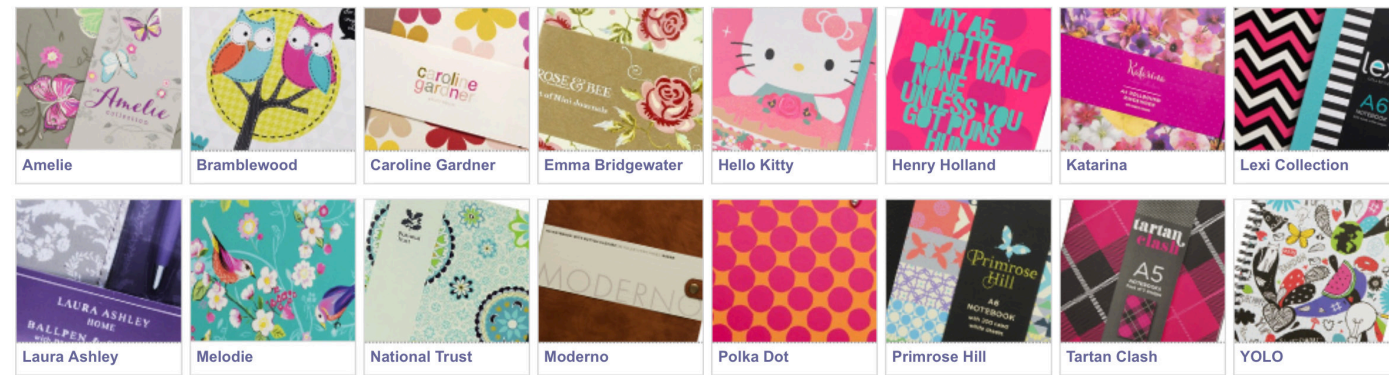


WHSmith 'Colour your way' campaign - 3 for 2 offer across WHSmith coloured filing, refill pads, and polypro notebooks, Pukka Pads, Bic Cristal pens, Zebra Z-Grip, Staedtler ballpoint pens, Papermate Inkjoy, Uniball Eye, Uniball TSI, Pilot Frixion, V5, Papermate Flexigrip, WHSmith ink refills, WHSmith pencils, Sharpie pens, Stabilo Boss highlighters, Stabilo point 88, Post-it notes, Oxford maths set, Blu tack, Loctite glue.

AW15 NEW FASHION STATIONERY

WHSMITH

The majority of WHSmith fashion ranges flow through from Back to School as follows:



One new range Laura Ashley Grace collection is introduced for autumn winter. Continuing the art deco trend this range is made up of stationery and gift items with opulent metallic gold detailing, foiling and flocked fabric covering papers. Product includes notebooks and journals, address and contact books, pencil cases and cosmetic bags, filing and storage and pen gift sets.



WILKINSONS

The majority of Wilkinsons fashion ranges also flow through from Back to School. One new range is introduced for autumn winter - Botanica range.



Botanica Stationery

Varsity Stationery

Selfie Stationery

Forget Me Not Stationery

The Botanica range follows the Botanical floral and butterfly trend and includes gift stationery in a petrol blue, cream and pink colour pallet. Product in the range includes notebooks and notebook sets, project books, scrap book album, gift pen in box, storage boxes, organiser, desktop accessories set, filing, to do list pads, pencil case, printed popper wallets and filing, labels and sticker set and memo notes.



AW15 NEW FASHION STATIONERY

PAPERCHASE

Paperchase autumn winter ranges focus on gift stationery. In AW15 there were 5 fashion stationery ranges on sale:

Let's face it - fun kids range - with fruit, food and animal characters in bright colours, some on a stripe background pattern.
Products include: polypro notebooks, writing set, recipe journal, eraser set, ringbinder, padfolio, lockable journal, ziplock notebook, multipen, gel pens, photo album, zipper file, list pads, colour changing pens, colouring pencils, reward sticker book, scrapbook, invitations, snack boxes, water bottle, luggage tag, key ring, hot water bottle, wash bag.



Owl crowd - the owl trend continues with this collection of folk owl characters on a grey background with knitted patterns on their breasts. Products include: notebooks, lockable journal, photo albums, desk and list pads, sticky notes and memo blocks, colouring pens, highlighters, pencil cases and pen pots, scrapbooks, exercise books, diary, satchels, shopping bags, gift tags, glasses case, keyrings.



Vision - sophisticated peacocks, florals and birdcages in a blue, cream and green colour pallet. Products include: notebooks, pencil cases and pen pots, pencils, desk and list pads, desk storage, exercise books, sticky notes, memo block, foldaway bags, gift tags, journals, pens, scrapbooks, self adhesive photo albums and stickers.

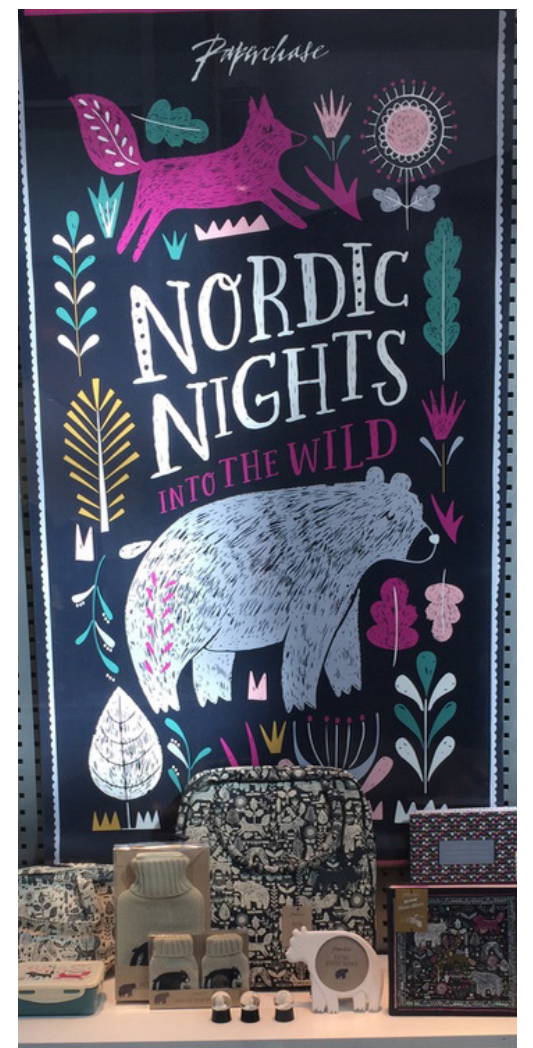


AW15 NEW FASHION STATIONERY

Mystic Rose - inspired by the frozen floral fashion trend, the mystic rose collection fuses photographic florals, gothic skulls, metallic and embossed finishes in purple, rose gold and icy blues to create a stunning fashion stationery range. Products include - 2016 diaries, pens, pencil case, sticky notes, magazine file, chalk board, lever arch file, stationery box, small journal, exercise books, lockable journals, magnetic notebook, ringbinder, magazine file, linen notebook scrapbook, metal in tray and letter rack, writing set, foldaway bag, travel cup, gift bags, iphone cases, pass case, umbrella, photo frame, kindle case.



Nordic Nights - Scandinavian themed patterns and imagery featuring illustrated mountain animals in a navy, white and kraft colour pallet with turquoise and pink highlights. Products include: diaries, stationery set, notebooks, notecards, pencil case, pens, mini notebooks, correspondence set, elasticated folder, ringbinder, clipboard, scrapbook, sticky notes, list pad, photo album, ipad case, gift bags, money box, photo frames, candle.



AW15 NEW FASHION STATIONERY

SAINSBURYS

Sainsburys launched three new fashion stationery ranges - Glam, Vintage floral and Wilderness.

Glam - following the art deco trend with a gold black and cream colour pallet with a hot pink modern twist.
Products include: exercise books, notebooks, pencil cases, desk accessories, meal planner, ring binder, lever arch, magazine file, stationery box, expanding file, memo blocks, ballpoint pen, diaries.



Vintage floral - new vintage floral range in two colourways - light and dark, both feature floral and butterfly designs with foiled metallic finishes.

Products include: notebooks, diaries, desk planner, memo block, desk accessories, ballpoint pen, ring binder, lever arch, stationery box, magazine file. Two designs dark floral and traditional floral.

Wilderness - this trend is about getting back to nature and the adventure of the great outdoors, designed to be more unisex with tan journals and printed kraft, navy and dark red colour pallet.

Products include: exercise books, notebooks, desk accessories, pencil case, desk planner, ring binder, lever arch, magazine file, expanding file, diaries.



AW15 NEW FASHION STATIONERY

TESCO

Tesco introduced four new fashion design ranges for autumn winter - Neon, Anya, Amethyst and Bicycles.

Neon - pink and yellow neon geometric patterns are printed onto grey board. Products include: lever arch file, magazine file, exercise books, list pad, greyboard notebooks with coloured wiros.



Anya - Russian doll characters with a folk floral patchwork design in pink, blue and cream colourways. Products include: storage box, exercise books, polypro notebooks, stationery set, printed popper wallet, ringbinder, lever arch file, magazine file, desk calendar.



Amethyst - purple flowers and butterflies on a cream background. Products include: notebooks, to do list, pencil case, printed popper wallet, document folder, storage box, magazine files, exercise books, diaries.



Bicycles - bicycles, clouds and text 'live the life you have imagined' in a coral, white, green and black colour pallet. Products include: ringbinder, lever arch file, notebooks, address book, desk set, magazine file, stationery box and diaries.



2016 DIARIES

WHSMITH

WHSmith have the largest selection of diaries on the market with over 200 options both in store and online. In October 2015 they ran a promotional offer to encourage early sales across diaries and notebooks, which was advertised in their windows: Half price A5 notebook when you buy ANY 2016 diary.

Diaries are merchandised on waterfall fixtures in WHSmith along side design notebooks. Price points start at £3.99 for a pocket diary and go up to £29.99 for an A5 leather day to page diary. Their average price point is much higher than their competitors but they offer a broader choice of formats, designs and finishes and are still seen as a destination retailer for diaries.

The range is made up of both own label WHSmith diaries and branded diaries. In terms of formats they have most options of week to view (almost half of the range), followed by day to page (around a third of the range) and a smaller number of options for two weeks to view, week to view with appointments and day to page with appointments. Most options are casebound, particularly among the plain coloured diaries where there are only 4 wiro options. Within the design diary section polypro options are wirobound but again the majority of options are casebound.

The range is split into plain coloured diaries - both business and personal and design diaries. Within these categories the range hierarchy is as follows:

Plain coloured diaries:

Space is split between mini, slim, A6, A5 and A4 formats.

Entry price points are standard black and silver diaries.

Second tier is block coloured pink and lilac essentials diaries with a silver date stamp.

Third tier is plain block coloured diaries in special substrates eg. silk, soft touch pu, metallic pu, polypro and leather.

Top tier is WHSmith and Letts leather diaries and Collins Elite range.

Design diaries:

Space is split between A6, A5 and slim formats with the most space given to A5 followed by slim. Entry price points are paper covered casebound and wirobound diaries.

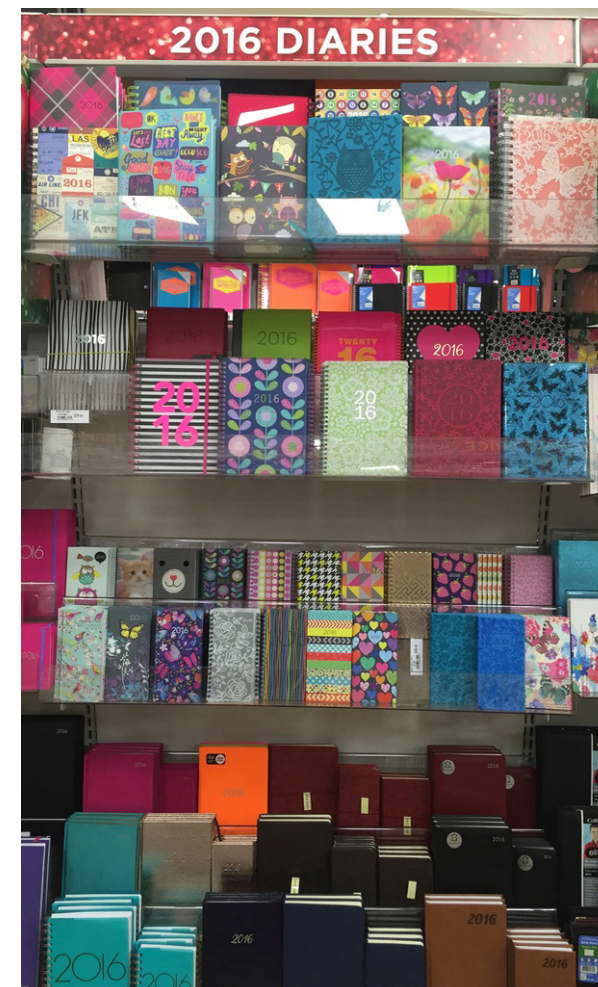
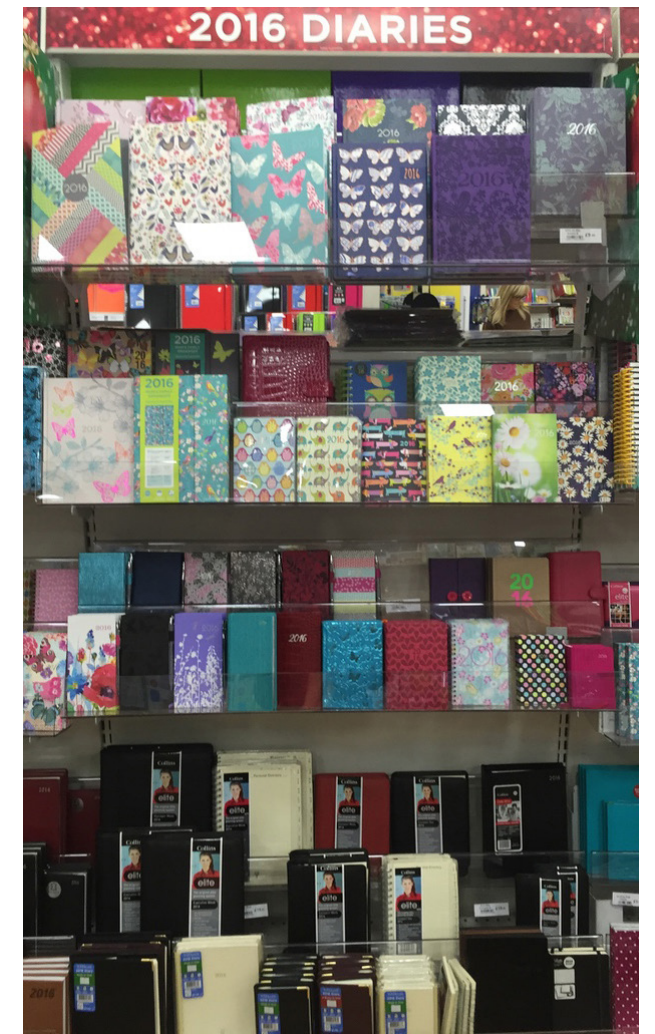
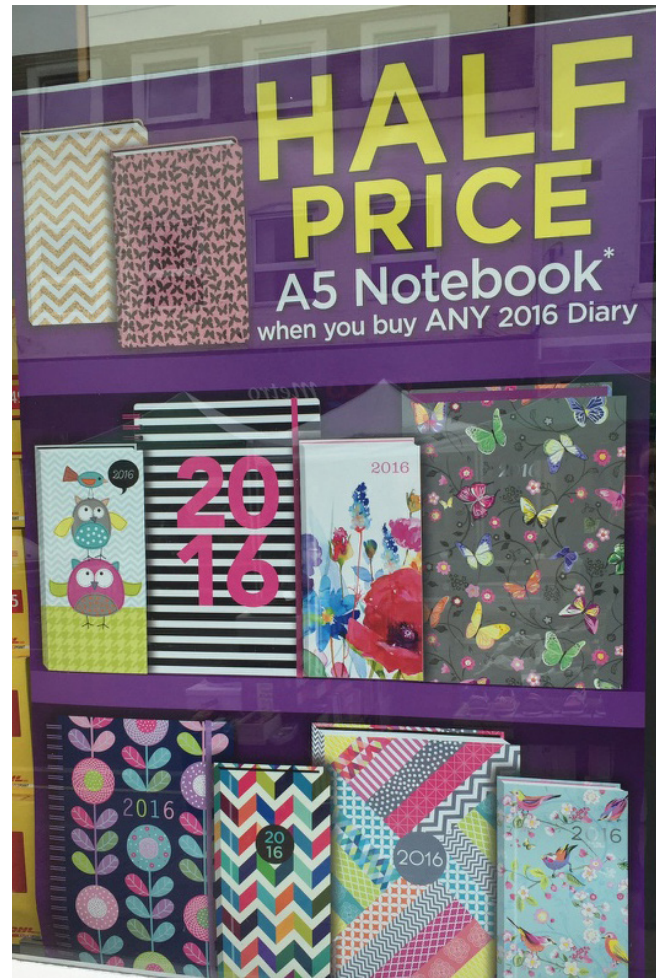
Second tier is polypro notebooks

Third tier is special substrates/ finishes/ closures - plastic covered diaries, debossed pu, magnetic closure, lockable closure, foiled finishes, flocked finishes.

Top tier is branded design diaries. Brands include: Happy Jackson, WWF, Dodo-Pad, Busy B, Good House Keeping, British Bake Off, Me to You, Born to Shop, Laura Ashley, Winnie the Poo, British Heart Foundation, Boofle, Organised Mum, the Bright Side, Colour Your Days.

Design themes:

Birds, owls, butterflies, sausage dogs, elephants, face friends, photographic kittens, white stencil butterflies, embossed florals, animal print, dog tooth, spots, geometric triangles, stripes, tartan, speech bubbles, travel tickets, hearts, patchwork stripes.



2016 DIARIES

RYMAN

Ryman have three bays of diaries in their largest stores and over 200 options online. The range is split equally between business and academic diaries and personal diaries in terms of options. Around a third of options are Ryman branded. More space in store is given to business and plain coloured diaries. The majority of the range is casebound. Online price points start at £0.99 for a pocket executive diary up to £57 for Letts Financial Times diary. In store price points go up to £29.50 for the Collins Elite range.

The range is structured as follows:

Entry price points - standard diaries in blue, red and black colourways.

Second tier - coloured soft cover pu diaries in bright pink, orange, blue and green.

Top tier - branded diaries.

Brands stocked are as follows:

Plain coloured: Espositi, Letts, Langham by Ryman, Collins Classic and Elite, Castilli, Moleskine, Leuchtturm.

Design diaries: Letts, Collins, Go Stationery, Paperblanks, Mum's diary, the Domestic Goddess diary, Minions diary.

Design themes: paisley, owls, stencil white pattern, graphic and blurred florals, patchwork, butterflies, tartan.

Most design options were in a slim format followed by A6, then A5 size.



PAPERCHASE

Paperchase have a different structure of diary range to the rest of the high street with no standard diary formats and a focus on Paperchase design ranges rather than brands. Design diaries make up 80% of the range. Soft touch pu plain coloured diaries are in the 'Noto' and Agenzio brands by Paperchase and Moleskine is the only non Paperchase brand stocked. As a result of the emphasis on design formats they have more week to view options (around 60% of the range) rather than day to page. They do very well with smaller formats giving more space to A6 and A6+ formats than A5. Around 10% of the range is wirebound and the rest is casebound.

Finishes and substrates include: plastic covered, plastic covered with glitter sheet underneath, debossed pu, foiled, linen diaries, silk, leather, metallic.

Design themes: birds, owls, butterflies, florals, stripes, nordic, galaxy/space, bicycles, elephants, cartoon dogs, cats, polka dot, cupcakes, ladybird, woodland, trucks, pears, London, bear, jewels, gold on kraft, Paris, bicycles.



2016 DIARIES

JOHN LEWIS

The John Lewis diary range is made up of branded fashion diaries. Design themes throughout the range are floral, the countryside, gardening, birds, owls and the family/ diaries for mum.

Brands stocked online are as follows:
Collins, Paperblanks, Moleskine, Caspari, Letts, Filofax, Mum's office, Cath Kidston, Go Stationery, Royal Horticultural Society, Organised Mum, teNeues, Caroline Gardner, Happy Jackson, Madeline Floyd, Kate Spade, Busy B, Alice Stott, Daily Telegraph, The Great British Bake Off.



WILKINSONS

One bay of diaries is ranged in larger stores. Half the range is made up of plain coloured diaries and half is made up of design diaries. Price points start at £1 for a small standard week to view diary. The top price point is £6 for a pu organiser with a pen.

The range is made up of standard desk diaries, black/blue/red soft touch pu diaries and organisers, brightly coloured fashion pu diaries and design diaries.

Design themes include: Botanica (butterfly floral AW15 range), hearts, debossed tree with birds, one shelf of 'Selfie' themed diaries including photographic animal selfies.



2016 DIARIES

STAPLES

The Staples diary range is focused on academic and business diaries from Collins. The majority of the range is in block colours (black, blue and red) and there is very little design product.



B&M RETAIL

B&M sell a small diary range merchandised with fashion notebooks, which flowed through from Back to School. Designs and formats include stripe, photographic animals, black standard diary and soft touch elasticated diary. All price points are under £2.



THE RANGE

Two bays of diaries were merchandised in larger stores. The first bay featured mainly standard and classic diaries. The second bay featured fashion coloured diaries and design diaries. Price points ranged from £1 to £4.99. Product was from Tallon International. Design themes included birds, cats, florals, spots, butterflies, owls, photographic dogs.



POUNDLAND

Small range of paper over board diaries in pink, blue and black plain colours. Some design diaries with the following themes: hearts, patchwork, stencils, owls, cars, cupcakes, debossed pu.



2016 DIARIES

TESCO

50 diary options, 1 bay in store with 2 shelves dedicated to standard and classic diaries and 4 shelves to design diaries. Price points start at £1 for a mini week to view diary up to £8 for a soft touch day to page diary with a buckle closure. Top price point is a Moleskine diary priced at £15. There is a good mix of week to view and day to page styles. The range is mainly Tesco branded with the exception of Moleskine and Mum's diary. Most of the range is casebound with 7 wirebound options. The most options are in the A5 size format, followed by A6 with fewer options of slim, A4 and minis.

Design themes include: clouds, flowers, butterflies, bicycles, dark florals on silk, foiled gold leaves and spots, gold with pale pink geometric, type/slogans - 'glitter is my favourite colour/ live the life you have,' Anya russian doll, plain brights on polypro, retro neon geometric colours on kraft board. Several new formats including soft touch diaries and a combined organiser, address and notes in diary format.



SAINSBURYS

35 diary options and some unusual size formats. All product is Sainsburys branded. Design stories fit with Sainsburys AW15 fashion trends: glam - polka dots, gold foiled spots and stripes. Vintage floral - dark purple florals, cream diaries with foiled butterflies. Wilderness - tan soft touch diaries and navy patterned diaries with elastic. All options are casebound with no wire options or polypropylene options. Price points start at £4 for an A6 diary up to £10 for a large day to page diary. A5 size or similar is the most popular format (one third of the range) followed by A6, then slim.

Substrates include standard pu, classic pu, paper over board, soft touch pu, fabric paper. In previous years diaries have been included in Sainsburys January sale promotion. They did not include stationery in the sale this year and diaries remained at full price into 2016.



2016 DIARIES

ASDA

Diaries are merchandised in red shippers branded as Collins. Prices start at £1 for a small standard week to view diary to £5 for an A4 day to page standard diary. The majority of the range is casebound with two wire options. The range is made up of a mixture of designs and red and black standard diaries. Substrates include printed paper over board, linen and black and red pu. The majority of A5 formats are day to page and smaller formats are week to view.

Design themes - bunting, stripes, florals, make the days count gold text on blue background.



MARKS & SPENCERS

A small range of design led casebound diaries. Price points were between £5 and £10.



MORRISONS

A small range of standard diaries, including a 2015 academic diary. No design diaries.



THE WORKS

The Works diary offer is focused on plain coloured diaries and business diaries in pink, blue, red and black colours. Bumper packs of 10 diaries are available online. There are some design options with tartan, taxi and photographic animal design themes.

REPORT CONCLUSION

Even though the product areas and colour pallets differ across both fashion stationery and Christmas papershop products, there are some clear trends coming through, which will still be around for AW16. Here are Bright Disposition’s predictions:

Owls - their broad appeal and likeability makes this trend very commercial. It can easily be adapted for Christmas with knitted jumpers and Christmas patterns. Generally illustrated characters - penguins, foxes and bears wearing knitted jumpers, hats and scarves are commercial on roll wrap.

Vintage - vintage florals were highlighted as continuing to be a key trend in the Back to School Stationery report and vintage Santa and Happy Holidays were a strong theme in AW15. This trend appeals to young and old which makes it very commercial.

Botanical florals - heavy florals play a larger role in fashion stationery designs than Christmas. However there was clearly a trend for illustrated holly wreaths and foliage in Christmas ranges this year and they tick the traditional box.

Brights - a massive trend over the Back to School 15 season and some contemporary brights and neon colours are seen in Christmas ranges as well. This trend will always be bigger on stationery but still has a role to play in Christmas, particularly in wrap accessories.

Selfies - sales of Selfie sticks and novelty Selfie frames performed very well this Christmas. This trend is here to stay and is easy to translate into pet and animal photographic selfie images.

Nordic - this trend has been around for a few years and performs very well for retailers with the combination of kraft papers, warm colour pallets and knitted patterns.

Stripes - red and white on Christmas product was a big trend this year and bright stripes on stationery are a good generic option on diaries and as a background pattern in fashion stationery designs.

Traditional cream and gold and **Winter Wonderland** are firm favourites and best sellers every year in Christmas ranges.

DISCLAIMER:
COPYRIGHT BRIGHT DISPOSITION LTD.
ALL CONTENT AND INTELLECTUAL PROPERTY PUBLISHED IN THIS REPORT BELONGS TO BRIGHT DISPOSITION LTD.
PLEASE DO NOT COPY, PUBLISH, REPUBLISH, REDISTRIBUTE OR DISSEMINATE ANY CONTENT FROM THIS REPORT WITHOUT PRIOR WRITTEN PERMISSION FROM BRIGHT DISPOSITION LTD.

ABOUT US:
BRIGHT DISPOSITION LTD IS A COMPANY SET UP AND OWNED BY ALEXANDRA MILES. ALEX HAS PREVIOUSLY WORKED FOR 15 YEARS IN THE GIFTS AND STATIONERY INDUSTRIES MAINLY AS A BUYER FOR WHSMITH, WHSMITH TRAVEL, HARRODS, BHS, PAPERCHASE AND SAINSBURYS. SHE IS AVAILABLE FOR CONSULTANCY WORK IN MARKETING (TRADITIONAL AND DIGITAL) AND PRODUCT DEVELOPMENT.
PLEASE CONTACT INFO@BRIGHTDISPOSITION.COM FOR MORE INFORMATION.
WWW.BRIGHTDISPOSITION.COM



APPENDIX - CHARITY CARD DONATIONS BY RETAILER

Percentage of pack price to charity	
Retailer	Amount donated
WH Smith	100% to Children in Need
Aldi	25% to Barnados, Prince's Trust
John Lewis	25% to Alzheimer's Society, Barnardos, WWF, Help for Heroes
Debenhams	20% to Children in Need
M&S	20% to Unicef, Macmillan, Breakthrough Breast Cancer
WH Smith	20% to Help for Heroes
Paperchase	13%-17% ^a to various, including: Terrence Higgins Trust, Farm Africa, Autistica, Sightsavers, Kids, Cystic Fibrosis Trust, Fight for Sight
Clintons	13%-15% ^b to Rays of Sunshine, British Heart Foundation, Marie Curie
Boots	10% to Children in Need, Macmillan
John Lewis	10% to 24 different charities
Ryman	10% to Marie Curie, Diabetes UK, Multiple Sclerosis Society, National Autistic Society, Stroke Association, Army Benevolent Fund
Sainsbury's	10% to Royal British Legion, Comic Relief
Waitrose	10% to Alzheimer's Society, Royal Voluntary Service, Place2Be, Buglife
WH Smith	10% to RSPCA, Marie Curie, Save the Children
Lidl	8% to CLIC Sargent
Co-operative	7% to FareShare

Depending on pack: ^a Between 45p and £1. ^b 25p or 15%.

Other retailers and Christmas card donations

As for the other major retailers, Asda told us that it is not selling charity Christmas cards this year. Morrisons is selling cards for Sue Ryder, but will donate £50,000 to the charity regardless of how many packs are sold.

Tesco is also selling a range of charity cards and donating a total of £300,000 to Diabetes UK and the British Heart Foundation.

Source: Which? website.
<http://www.which.co.uk/news/2015/11/charity-christmas-cards---which-retailers-donate-the-most-money-422767/>