



Holiday Season Shoppers

Italy

criteo.

1

Buy less, buy better?

2

The sober-curious trend
may slow alcohol sales

3

Environmental concerns
matter to everyone in Italy
– brands values are also
important especially
among younger shoppers

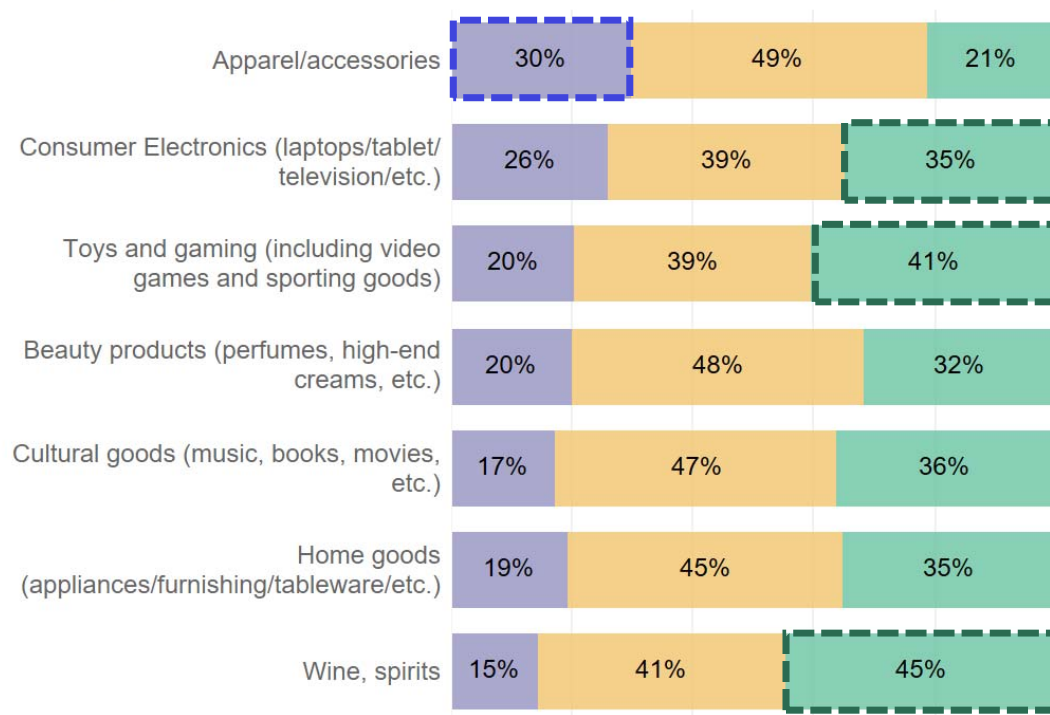


1

Buy less, buy better?

Overall Italian shoppers plan to buy less across all product categories this holiday season, except on apparel/accessories

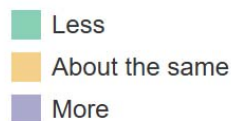
Shopping intent by product category, Christmas
Country: Italy



N=1,198

Source: Criteo Holiday Shoppers survey, Oct-Nov 2019

Q: To your best estimate, will you be spending more, less or about the same amount on the following categories during Christmas this year?

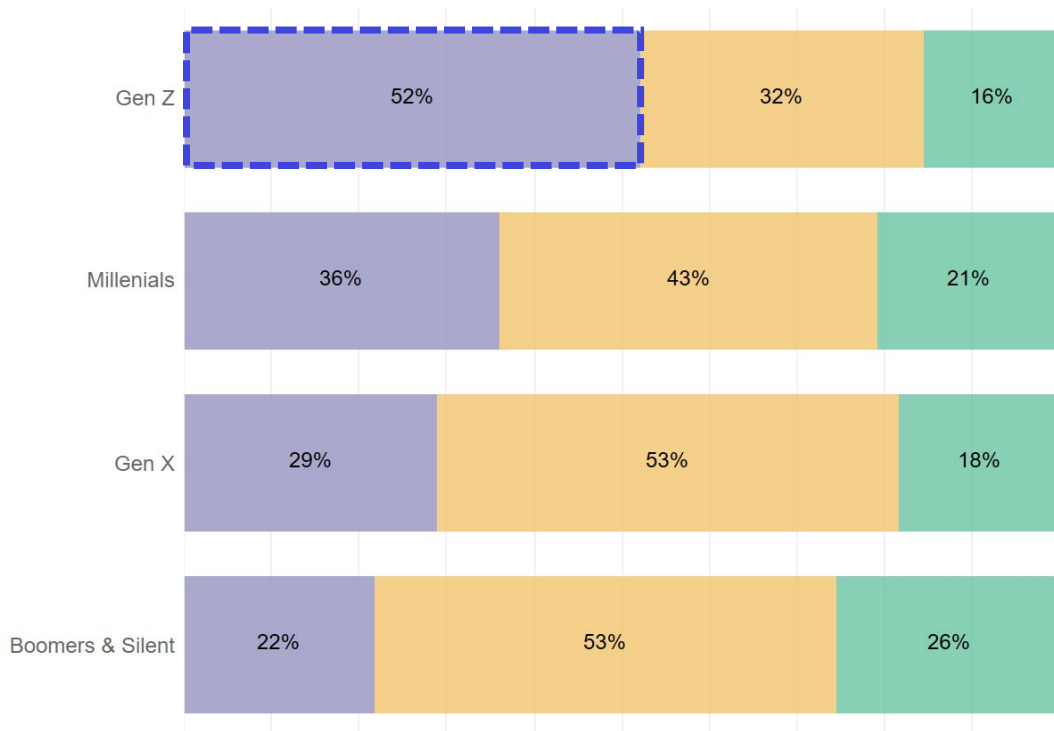


Shopping intent in Italy is low across all product categories (except for apparel/accessories), as shoppers planning to spend less outnumber those planning to spend more than last year.

Categories that will be the most challenged include toys and gaming, cultural goods, consumer electronics and home goods.

However, expectations are high for apparel and accessories sales among Gen Zers

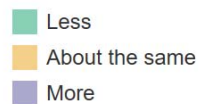
Shopping intent by age group, Apparel/accessories, Christmas
Country: Italy



N=1,198

Source: Criteo Holiday Shoppers survey, Oct-Nov 2019

Q: To your best estimate, will you be spending more, less or about the same amount on the following categories during Christmas this year?



Over one out of two Gen Z shoppers plan to spend more on apparel/accessories than they did last year

In comparison, the proportion of Boomers & Silent saying they will spend *less* on apparel outweighs the proportion saying they will buy *more*



2

**The sober-curious trend
may slow alcohol sales**

Expect sober-curious Gen Z shoppers to spend significantly less on wine and spirits

53%

We can see a trend to reduce spend on wine and spirits this holiday season across all age groups.

53% of Gen Zers plan to spend less on wine and spirits this holiday season (compared to an average of 45% in Italy)

N= 115 Gen Zers

Source: Criteo Holiday Shoppers survey, Oct-Nov 2019

Q: To your best estimate, will you be spending more, less or about the same amount on the following categories during Christmas this year?

Wine/Spirits

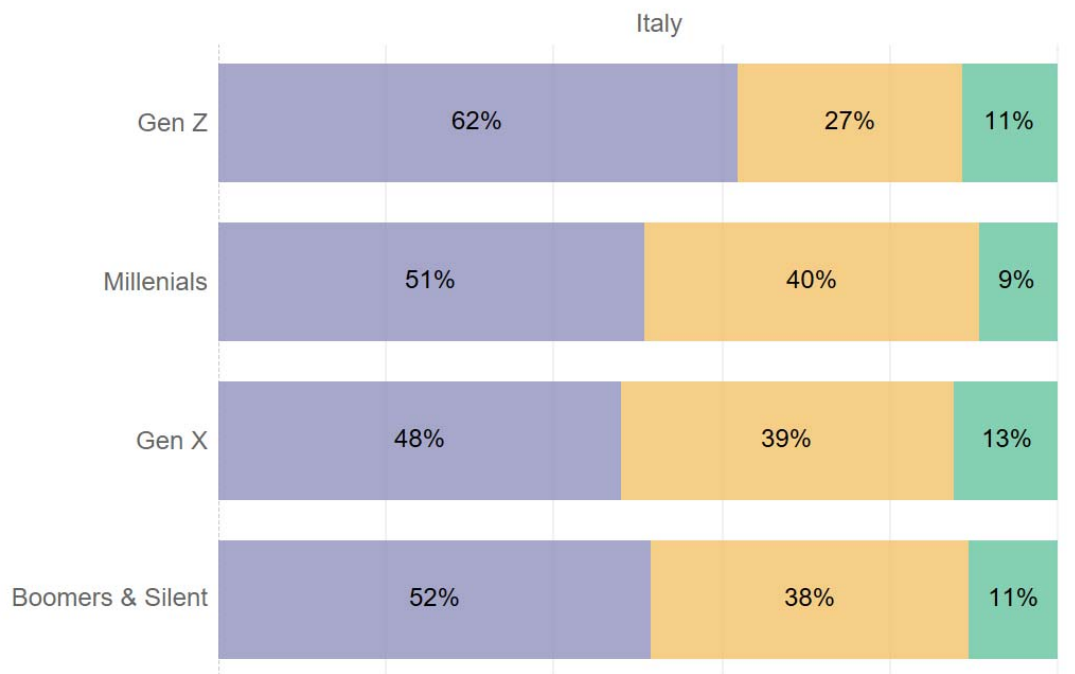


3

**Environmental concerns
matter to everyone in
Italy**

Italian shoppers will care about the environmental impact of their holiday purchases

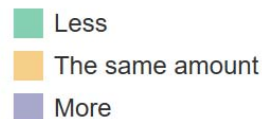
Planning to do more or less of ...
Pay attention to the environmental impact of my purchases



N=1,197

Source: Criteo Holiday Shoppers Survey

Q: Compared with last year, for the next holiday season, what are you planning to do more and less of? Results for "Pay attention to the environmental impact of my purchases"



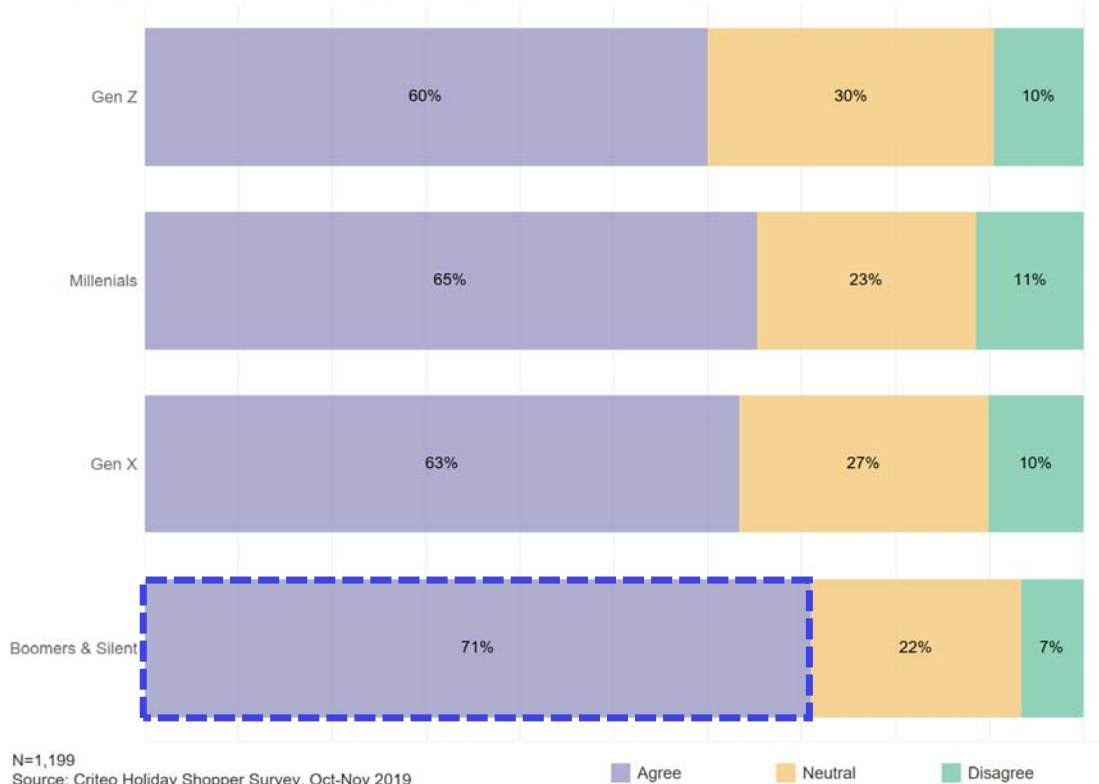
Paying attention to the environmental impact of their holiday purchases is a concern that most Italian shoppers give importance to.

Over one out of three Gen Zers will pay more attention to the environmental impact of their purchases this holiday season.

Everyone wants to buy eco-friendly products in Italy...

Opinions about holiday season shopping by age group, Italy

When given a choice between two similar products for a present, I'm more likely to buy the one that's eco-friendly



N=1,199
Source: Criteo Holiday Shopper Survey, Oct-Nov 2019
Q: Please rate your agreement with the following statements

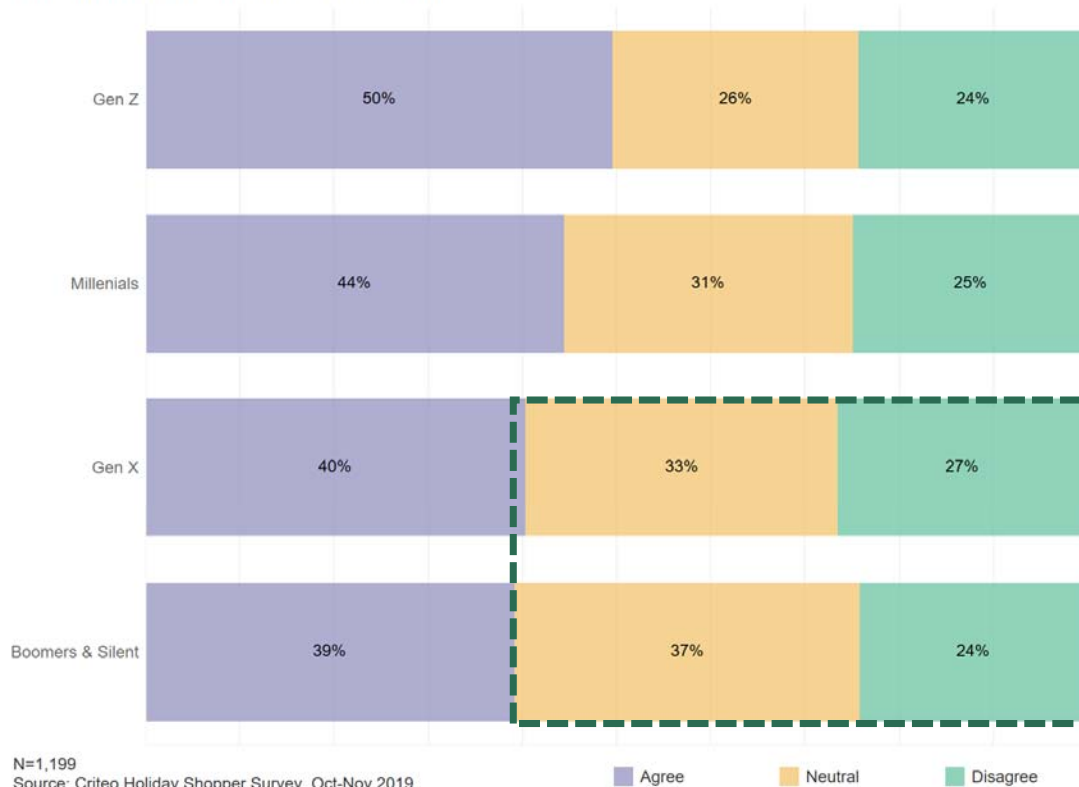
Agree Neutral Disagree

71% of Boomers & Silent would be more likely to buy an eco-friendly product when given a choice between two similar products for a present.

...Until they must pay the price

Opinions about holiday season shopping by age group, Italy

I don't mind paying more for eco-friendly presents



N=1,199
Source: Criteo Holiday Shopper Survey, Oct-Nov 2019
Q: Please rate your agreement with the following statements

Italian shoppers are eco-friendly but they are also price sensitive. Only Gen Z shoppers are still a majority to be likely to pay more for eco-friendly presents

Reasons why brands need to build a long-lasting relationship with Gen Z shoppers

54%

of Gen Zers will buy more brands they are familiar with

47%

of Gen Zers plan to spend more money on brands that are aligned with their own beliefs and values

43%

Plan to discover new brands this year, more than they did last year during the holiday season

N= 115 Gen Zers

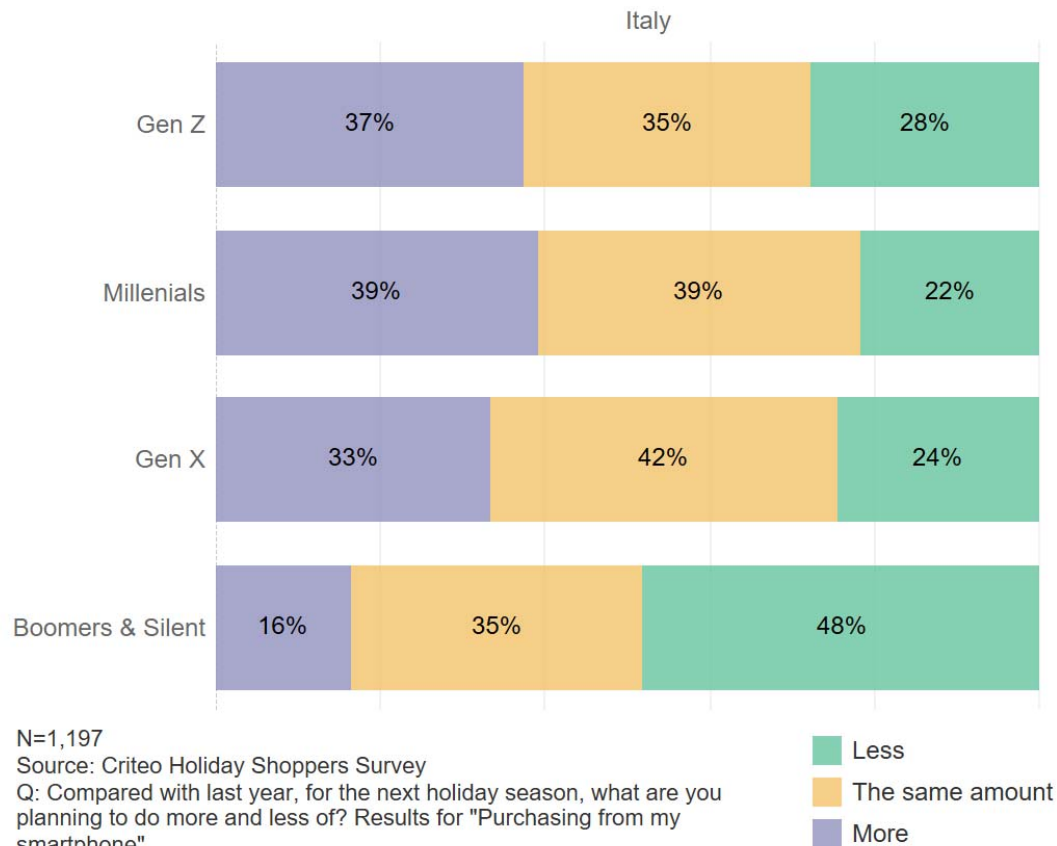
Source: Criteo Holiday Shoppers survey, Oct-Nov 2019

Q: Compared with last year, for the next holiday season, what are you planning to do more and less of?

- Buy brands whose values align with mine
- Buy brands I am familiar with
- Discover new brands

Mobile officially takes over, with all but the older shoppers embracing mobile commerce

Planning to do more or less of ...
Purchasing from my smartphone



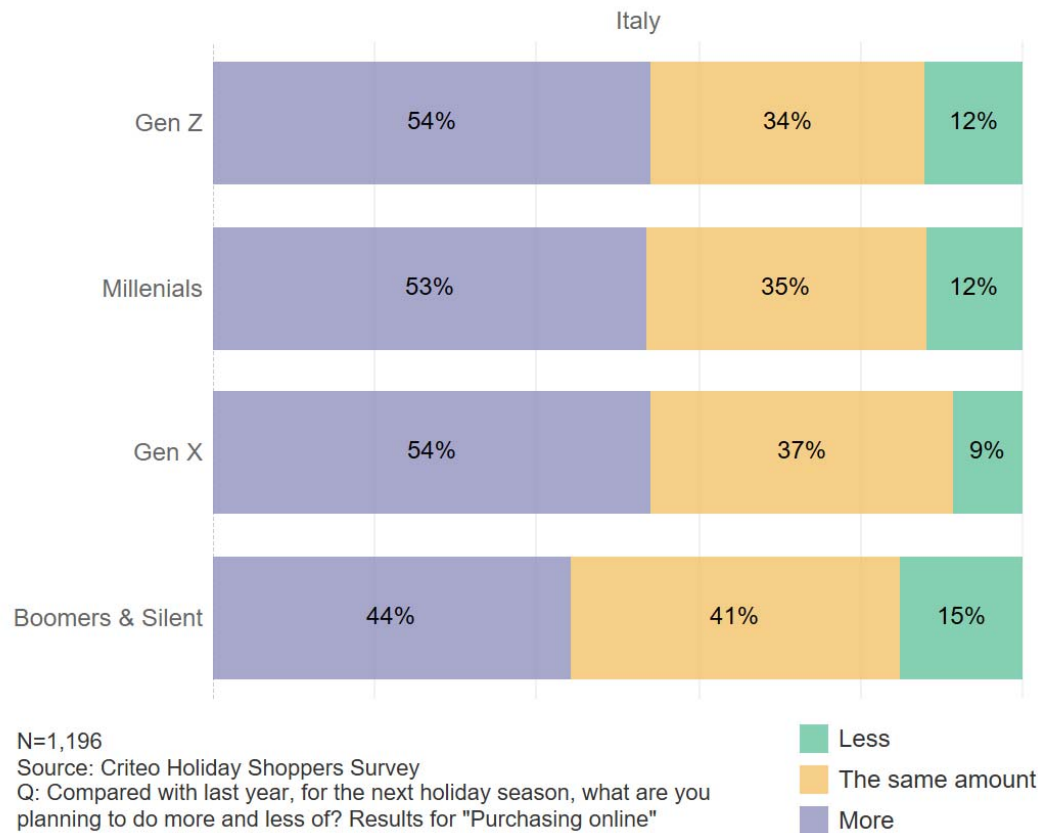
For the Italian shoppers planning to make purchases during the holiday season, over one out of three Gen Zers, Millennials and Gen Xers plan to purchase more from their smartphone than they did last year

Older generations are still leaning away from mobile purchases

Only 1 in 6 Boomers & Silent shoppers plan to use their phone more this year to buy

Rather than fighting the crowds in store, Italian shoppers will buy more online this holiday season

Planning to do more or less of ...
Purchasing online



Purchasing online will be strong this year across all generations in Italy.

Even if only 16% of Italian Boomers & Silent plan to buy from their phone this holiday season, 44% of them say that they are planning to purchase more online this year.

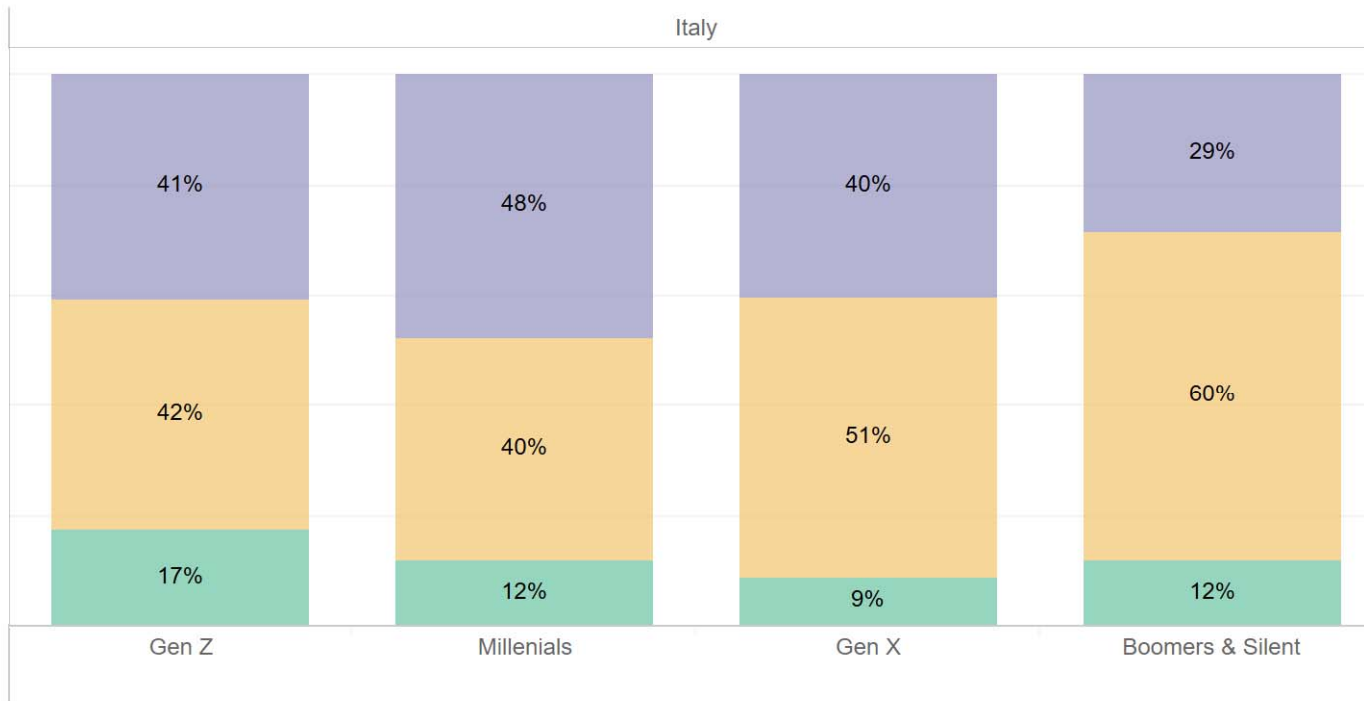
Older generations will use computers or tablets when making purchases



Appendix

Younger Italian shoppers are more likely to spend more this holiday season

Anticipated spend on Christmas, by age group



N=1,199

Source: Criteo, Holiday Shoppers Survey

Q: To your best estimate, how much will you spend for Christmas this year, compared with last year?

More
About the same
Less

Gen Z and Millennials plan to spend more this holiday season than they did last year

Only 29% of Boomers and Silent consumers are likely to spend more than they did last year

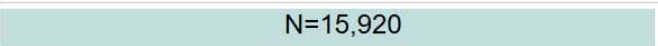
















Holiday Season Shoppers: Methodology

For this study, Criteo interviewed **15,920 consumers aged 18 and over across 16 countries**, who planned to purchase during the 2019 holiday season.

Start date: October 10, 2019

End date: November 14, 2019

Sample size by country

Grand Total				N=15,920
Americas	LATAM	Brazil		N=1,214
	North America	United States		N=1,518
		United States / NYC Metro ..		N=612
APAC	North APAC	Japan		N=1,105
		South Korea		N=1,041
	South APAC	Australia		N=1,008
EMEA	Europe	United Kingdom		N=1,507
		Italy		N=1,199
		Germany		N=1,129
		France		N=1,102
		Spain		N=1,080
		Netherlands		N=672
	Middle-East and Africa	South Africa		N=925
		Egypt		N=634
		United Arab Emirates		N=603
		Saudi Arabia		N=571

Holiday Season Shoppers: Sample Breakdown (Italy)

By age group (ranges)

18-24	N=115 (10%)
25-34	N=186 (16%)
35-49	N=321 (27%)
50-64	N=314 (26%)
65+	N=263 (22%)
Grand Total	N=1,199 (100%)

By age group (generations)

Gen Z	N=115 (10%)
Millenials	N=245 (20%)
Gen X	N=384 (32%)
Boomers	N=397 (33%)
Silent	N=58 (5%)
Grand Total	N=1,199 (100%)

Definition of age groups used in the breakdown by generation: Gen Z: born before 1994 (under 25), Millenials: born between 1981 and 1994 (25-38 yo), Gen X: born between 1965 and 1980 (39-54 yo), Boomers: born between 1946 and 1964 (55-73 yo), Silent: born before 1946 (74+)

By gender

Female	N=625 (52%)
Male	N=572 (48%)
Other	N=2 (0%)

By personal status

Married (children at home)	N=449 (37%)
Married (no children at home..)	N=287 (24%)
Single (children at home)	N=69 (6%)
Single (no children at home)	N=298 (25%)
Other	N=96 (8%)

By household income

Under €18,000	N=233 (19%)
€18,000–31,999	N=423 (35%)
€32,000-44,999	N=242 (20%)
€45,000-69,999	N=167 (14%)
€70,000-89,999	N=59 (5%)
€90,000-119,999	N=37 (3%)
€120,000-180,000	N=25 (2%)
Above €180,000	N=13 (1%)