



criteo.

THE NETHERLANDS

Festive Season Gifting Report 2020:

Consumer Sentiment &
New Buying Behaviors

Anticipation

Values

Giving

Renewal

Festive Season Shopping in the New Normal

Despite all the uncertainty in this anything-but-ordinary year, many Dutch consumers are ready to shop for everyone on their list this festive season. We surveyed over 1,100 Dutch shoppers to learn more. A few of the main takeaways from the research include:



Festive season buyers will do more of their shopping online this year.

While 27% of Dutch shoppers say they feel more comfortable shopping in-store now than they did a few months ago, 41% of them also said that they feel more comfortable shopping online this year than in-store. And while Dutch shoppers say they'll purchase more online across some product categories in the next few months, their offline purchases will be primarily groceries, household products, beer/wine/spirits, and Christmas decorations.



Early discounts are expected to drive purchases ahead of Black Friday.

Dutch shoppers are now even more price sensitive, and about 4 in 10 say that they won't wait until Black Friday to buy presents if they get early discounts from their favorite retailers.



Home delivery services are key to great festive season customer experiences.

4 out of 10 Dutch shoppers mentioned shipping as one of the most important factors when buying online. Shipping cost is also one of the top reasons influencing Dutch shoppers to buy at a specific online retailer this year.



1

Ecommerce will fuel
the festive season

2

Expect strong sales of
groceries

3

Dutch shoppers still
want to enjoy the
festive season

4

Promotions are
likely to drive sales
this year

5

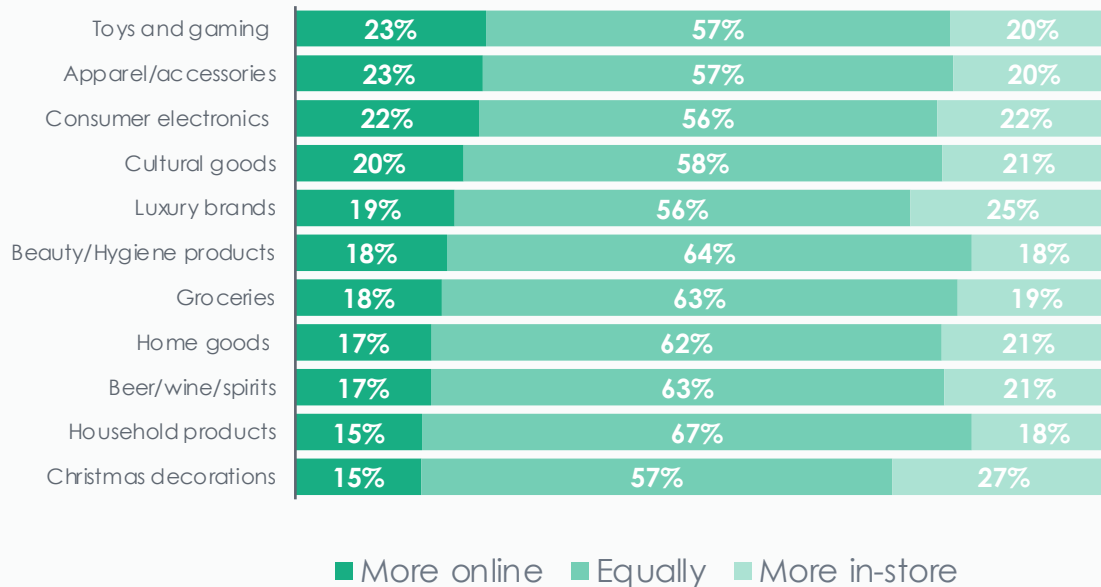
Amazon Prime Day
should impact historic
festive seasonality

1

**Ecommerce will fuel the
festive season**

1 in 5 Dutch shoppers plans to purchase more toys and games, apparel/accessories, and consumer electronics online this year.

For the festive season, compared with last year would you say you plan to purchase the following product categories...



Source: Festive Season Survey, The Netherlands, August 2020, n=1159.

1 in 5

Dutch shoppers plans to buy more products online this year, including toys and games, consumer electronics, and apparel/accessories.

At the same time, 1 in 5 of Dutch shoppers will keep going in-store to buy their household products, groceries, beer/wine/spirits, luxury brands items, home goods. and Christmas decorations.

+9%

higher online sales year/year in
September 2020

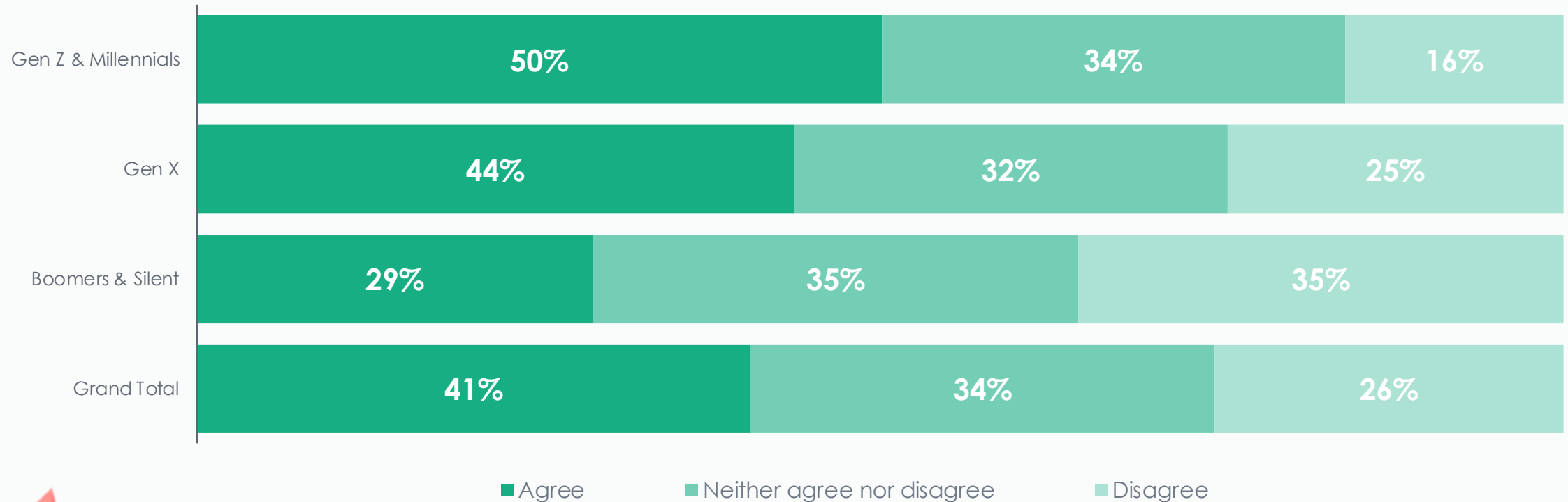


Source: Criteo Data, The Netherlands, indexed sales from September 1-21, 2020 compared to same period in 2019.

4 out of 10 Dutch shoppers feel more comfortable shopping online than in-store this year, especially younger generations.



Due to COVID-19, I'll feel more comfortable shopping online than in-store this year
(Strongly agree + somewhat agree)

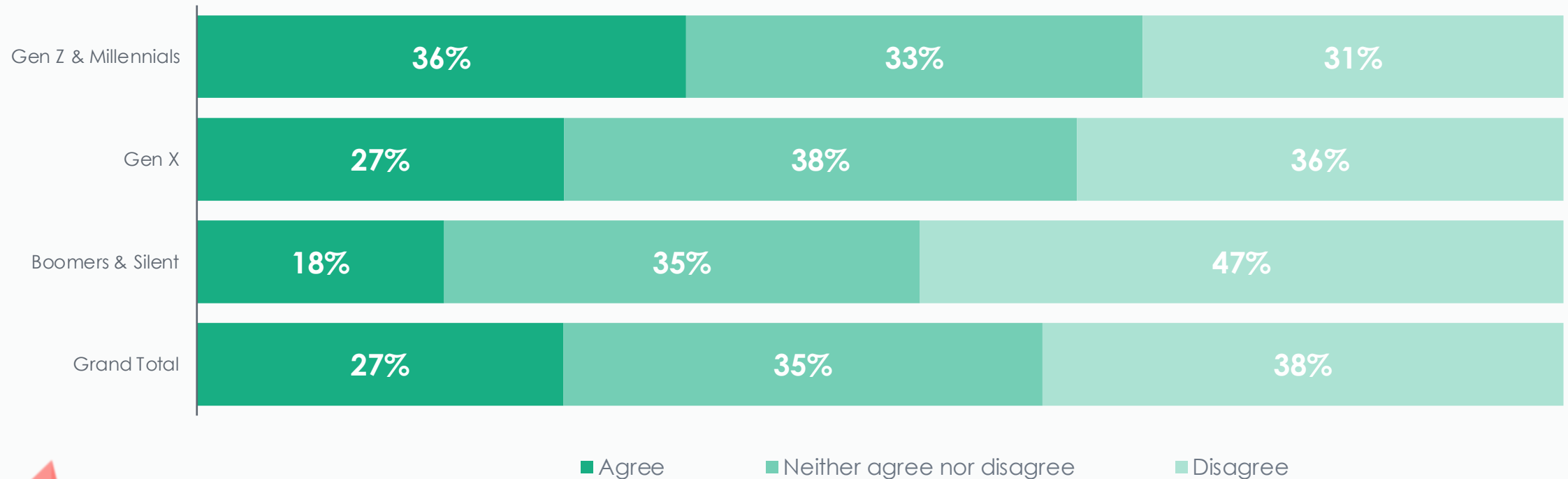


Source: Festive Season Survey, The Netherlands, August 2020, n=1159.

However, shopping in-store is not over. 1 in 4 Dutch shoppers feels more comfortable shopping in-store now than they did a few months ago.

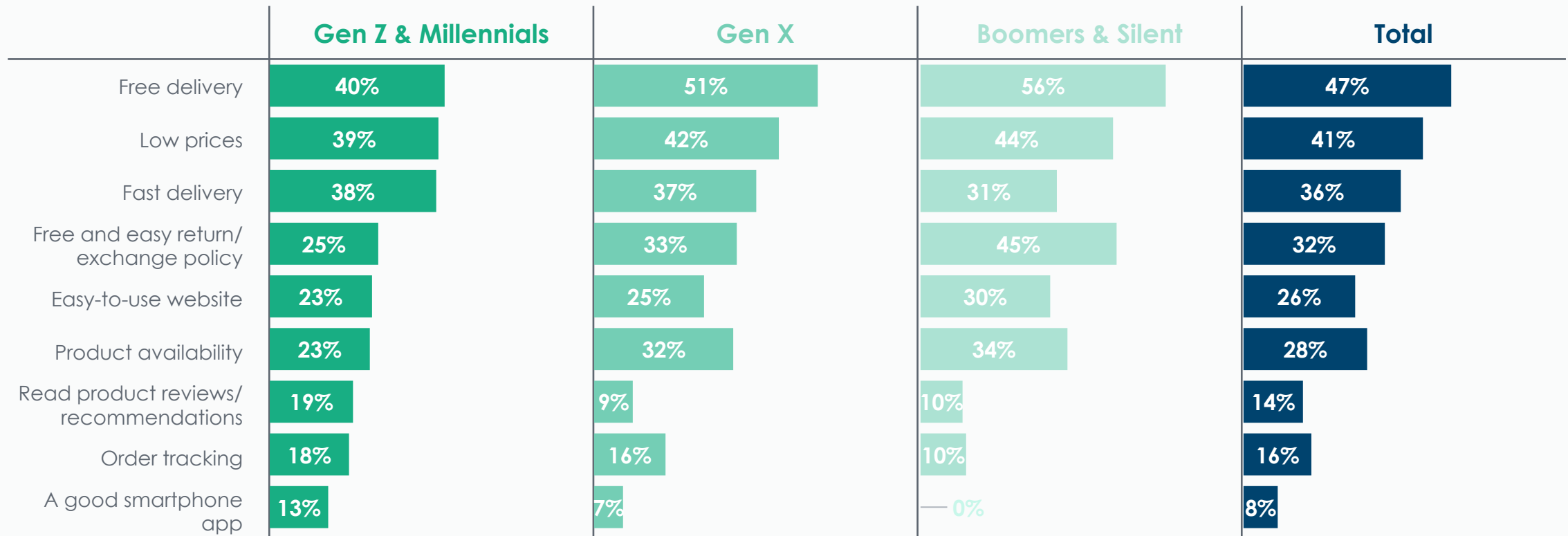


I feel more comfortable shopping in-store now than I did a few months ago
(Strongly agree + somewhat agree)



Source: Festive Season Survey, The Netherlands, August 2020, n=1159.

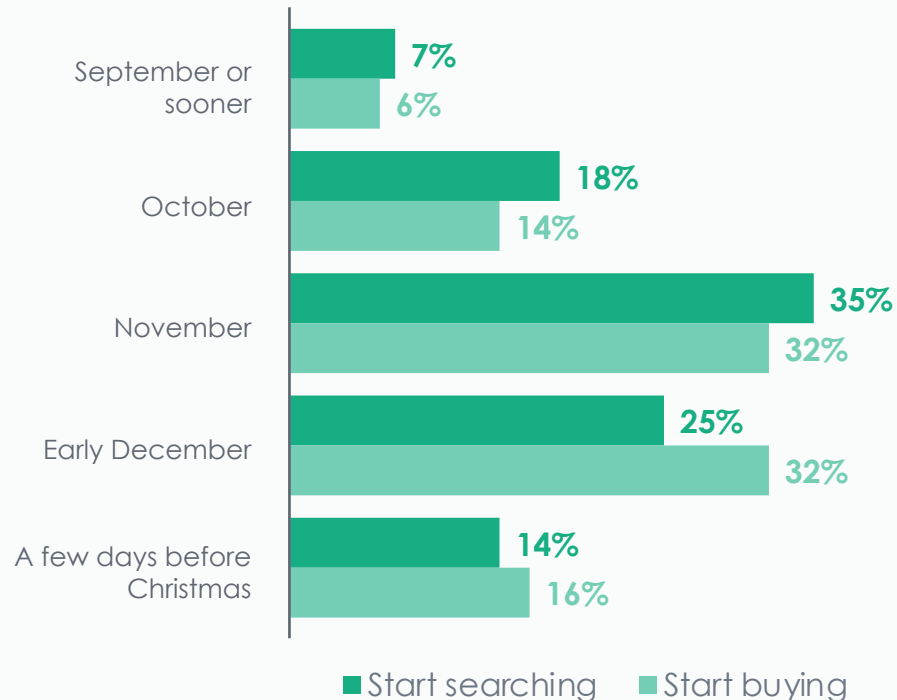
When buying online, most shoppers expect low prices and free delivery.



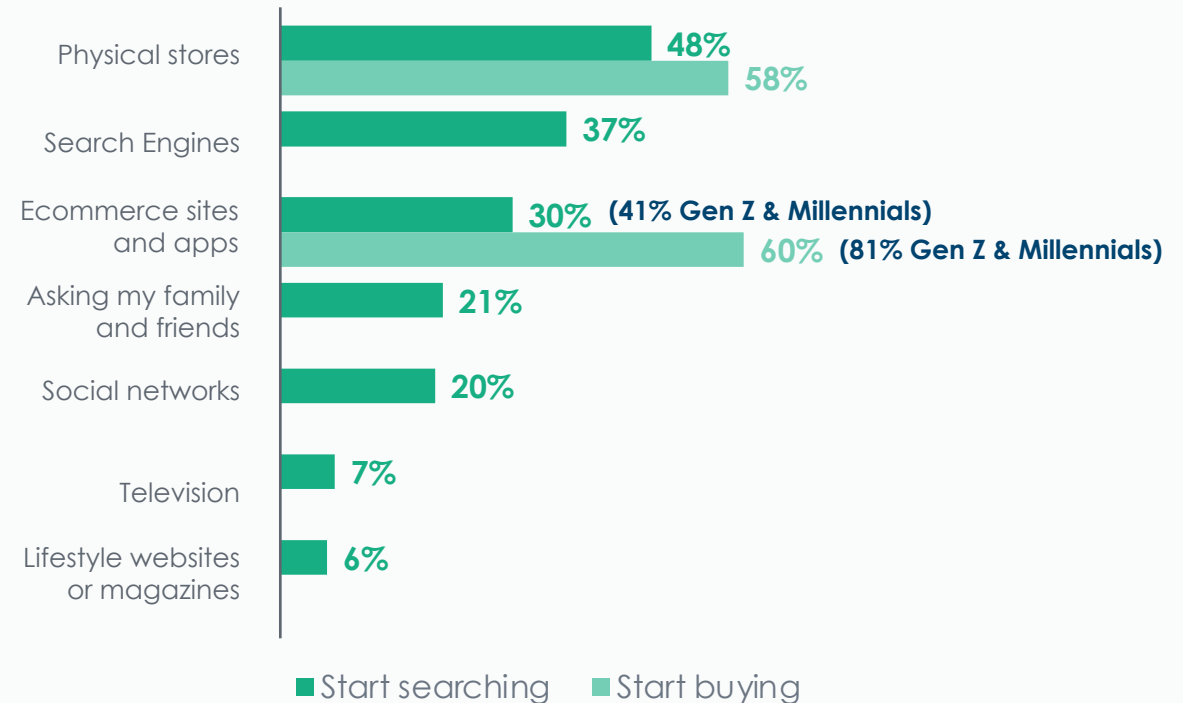
4 out of 10 Dutch shoppers are price sensitive. When buying online, 4 out of 10 Dutch shoppers expect free delivery service and low prices. Older generations also care about an easy-to-use website when buying, more so than younger generations.

Most Dutch shoppers will search for presents in-store and buy them on ecommerce sites and apps, especially older generations.

When do you plan to start searching for / buying festive season presents this year?



This year, where will you start searching for / buying for presents?



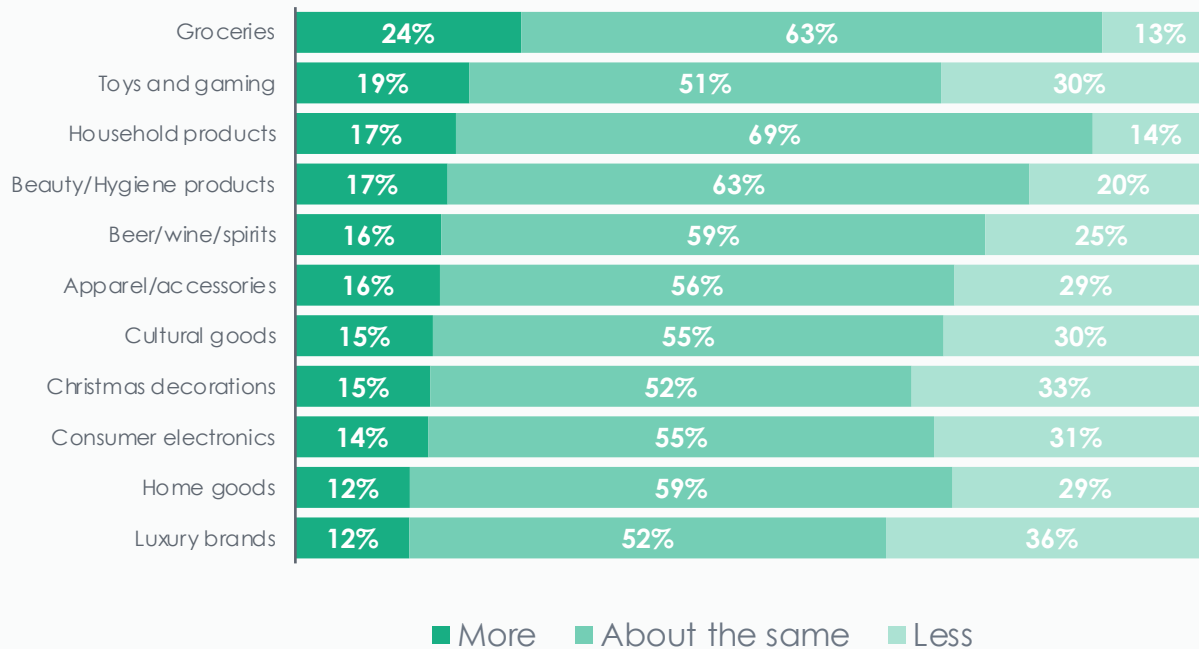


2

**Expect strong
sales of groceries**

Close to 1 in 4 Dutch shoppers will purchase more groceries this year.

Will you be purchasing more or less of the below product categories than you did last year?



Source: Festive Season Survey, The Netherlands, August 2020 n=1159

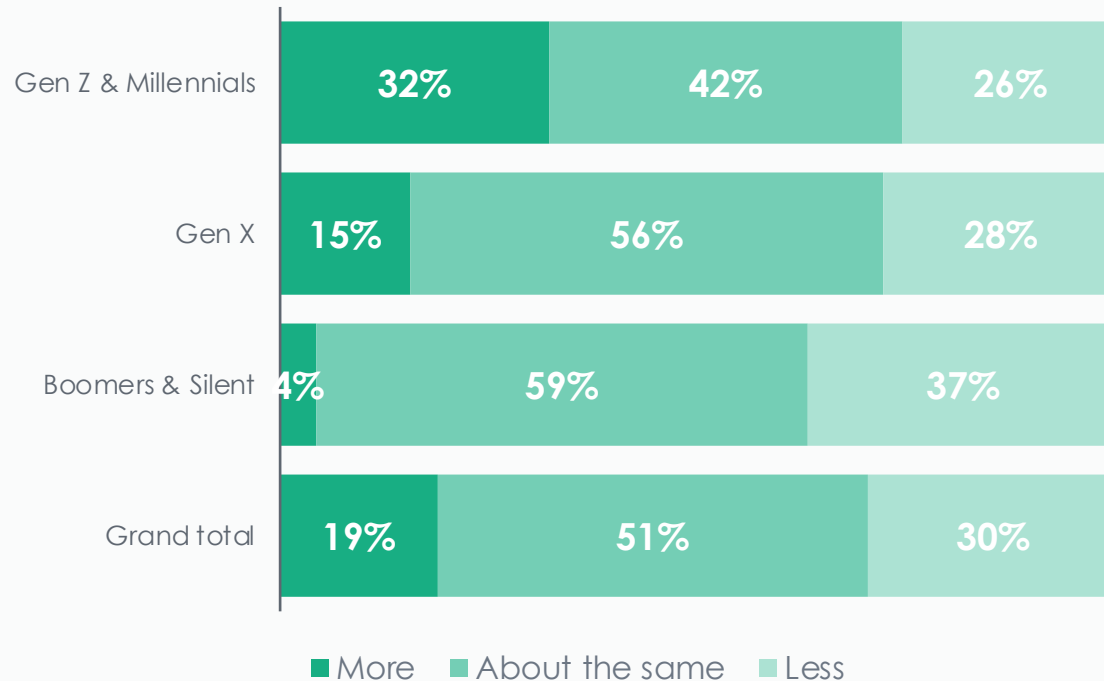
Close to 1 in 4

Dutch shoppers will spend more on groceries.

Categories that will be challenged include toys and gaming, household products, beauty products, cultural goods, beer/wine/spirits, consumer electronics, home goods, apparel, and luxury brands. In these categories, shoppers planning to purchase less outnumber those planning to purchase more than last year.

As Millennials become parents, they're driving growth in sales of toys and games.

Shopping intent by age group, Toys and Gaming



Source: Festive Season Survey, The Netherlands, August 2020 n=1159

Toys and games sales will be driven mainly by younger generations this year. Expect a massive surge in online sales.

The Boomers & Silent generation plan to purchase fewer toys and gaming items, perhaps due in part to uncertainty about whether family gatherings will take place this year.

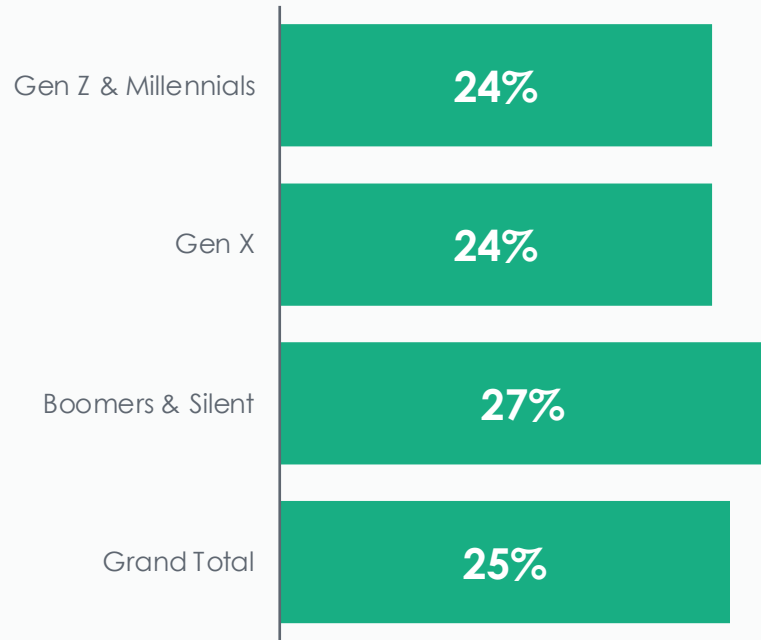


3

**Dutch shoppers still want to enjoy
the festive season**

Dutch festive season plans are likely to change this year.

I am still uncertain about whether family gatherings will take place this year



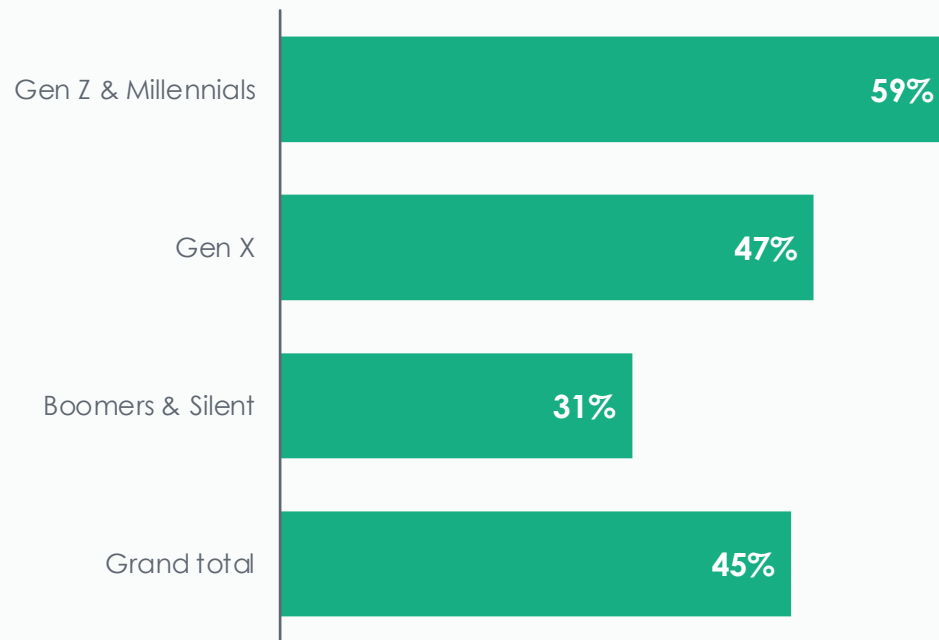
Source: Festive Season Survey, The Netherlands, August 2020 n=1159

One fourth

of Dutch shoppers are still uncertain about whether family gatherings will take place this year.

Over half of Gen Zers & Millennials will still shop this festive season, despite the challenging context.

I plan to purchase goods specifically for this festive season
(Definitely yes + probably yes)



Source: Festive Season Survey, The Netherlands, August 2020 n=1159

4 out of 10

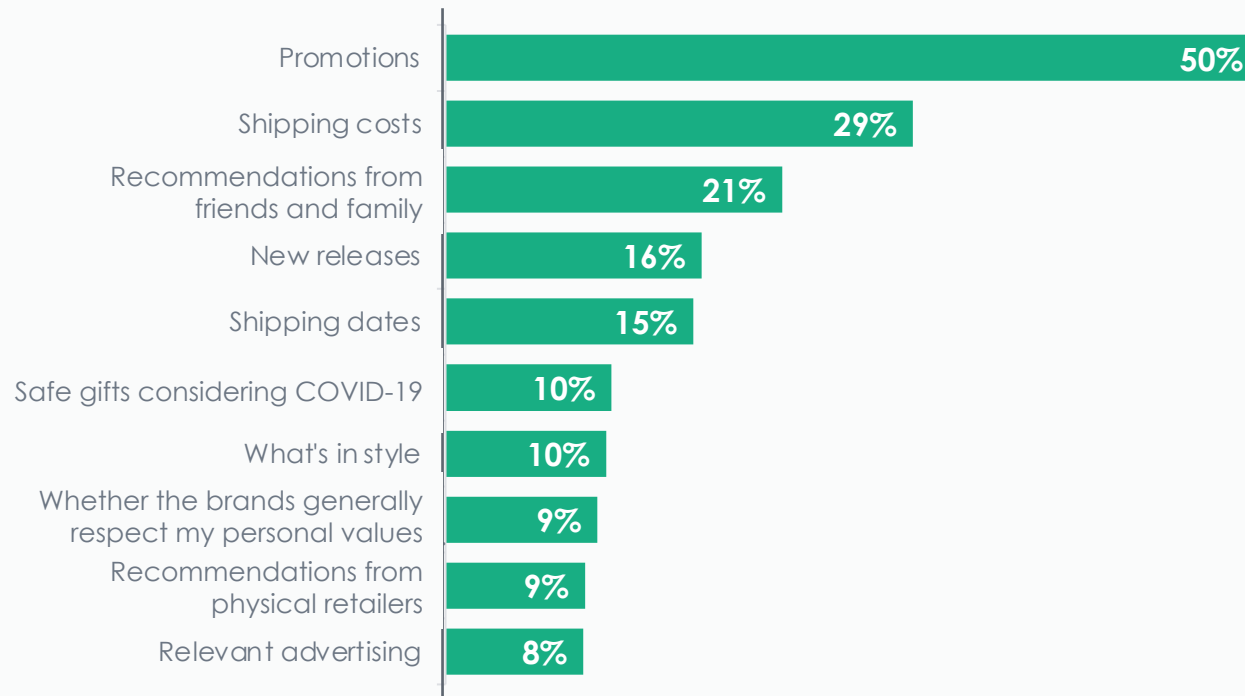
Dutch shoppers plan to purchase goods specifically for this festive season.

4

Promotions are likely to drive
sales this year

Promotions will have a significant influence on gift purchases this year.

This year, which factors do you think will influence your gift purchases?



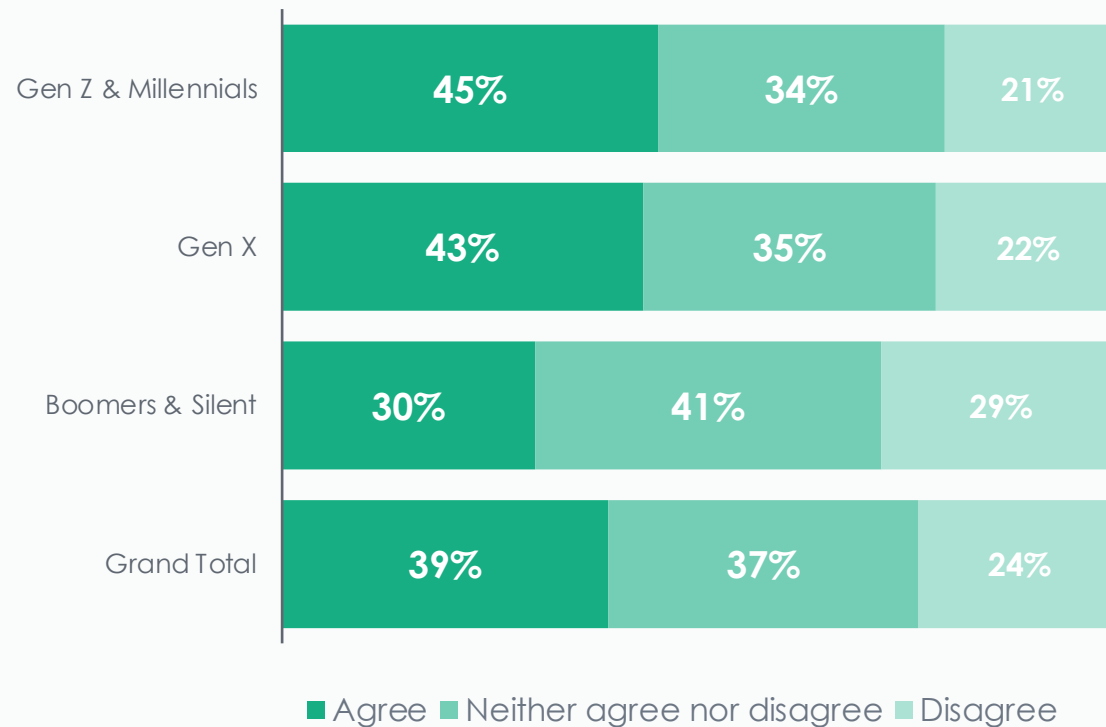
Source: Festive Season Survey, The Netherlands, August 2020 n=1159

50%

of Dutch shoppers are price sensitive, so driving promotions would likely have a positive impact on their purchases this year.

Early promotions this year will drive sales.

I wouldn't wait until Black Friday to buy presents if I get early discounts from my favorite retailers



Source: Festive Season Survey, The Netherlands, August 2020 n=1159

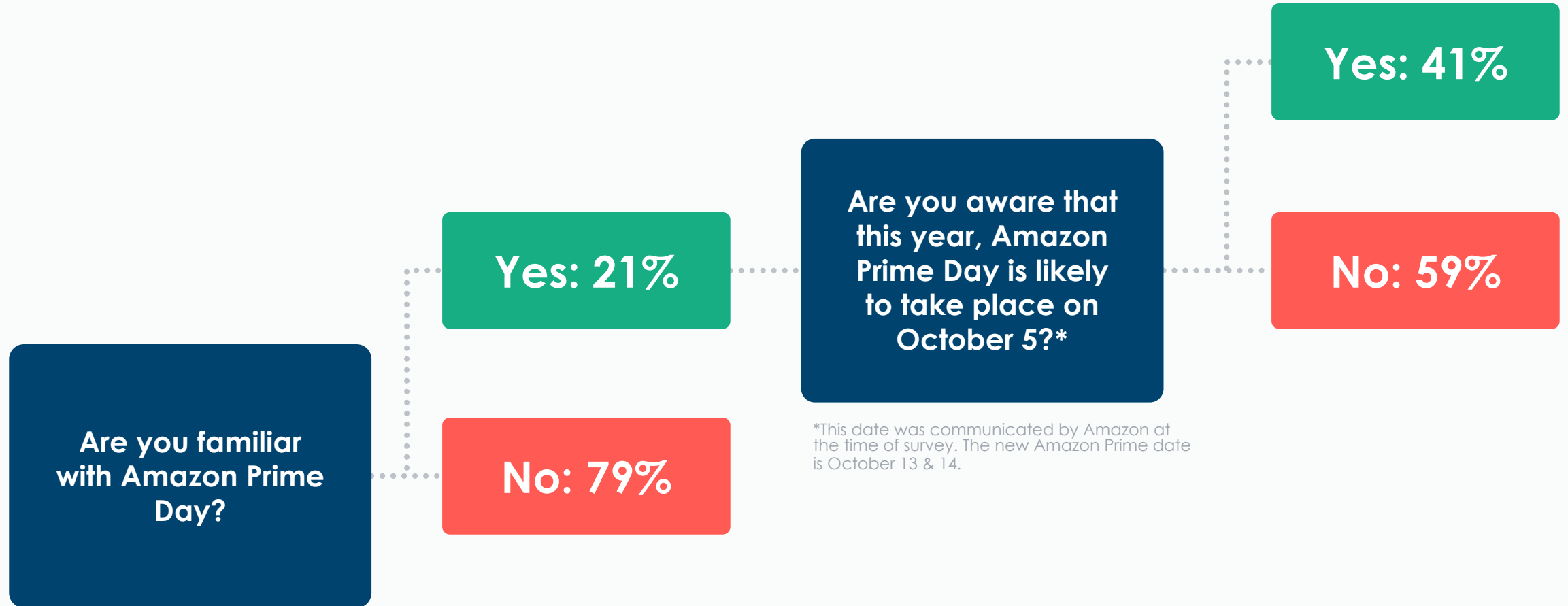
About 4 out of 10

shoppers said that they would not wait until Black Friday to buy presents if they get early discounts from their favorite retailers this year.

5

**Amazon Prime Day should impact
historic festive seasonality**

41% of Dutch shoppers who are familiar with Amazon Prime Day are aware of the new date this year.



*This date was communicated by Amazon at the time of survey. The new Amazon Prime date is October 13 & 14.

Knowing the new Amazon Prime date this year...

51%

of Amazon Prime members are likely to purchase some of their festive season presents during Amazon Prime Day

53%

of Amazon Prime members are likely to spend some of the money that they usually spend during Black Friday on Amazon Prime Day instead

51%

of Amazon Prime members are likely to wait until Amazon Prime Day to start looking for festive season presents

How to Engage the 2020 Festive Season Shopper

Ramp up your ecommerce strategy, and take extra care with your stores.



More shopping online will be the key difference for most consumers this festive season. Stores might be open or closed, but a majority of Dutch shoppers already plan to buy most of their presents online this year.



Boost your app and website by promoting new products in stock and other incentives like discounts and free shipping. If your stores are open, communicate about safety measures you're taking to put public health first and drive more foot traffic.

Stand out from your competitors with fast delivery and easy return options.



Make sure your existing customers are happy with your current home delivery service and won't switch to a competitor with a better delivery or return policy.

Customers across all generations are looking for fast and free delivery. This can be the key that makes you stand out from your competitors when a customer is wondering where to buy a similar product on a different website or app.

Use Shopping Intent Data

What is shopping intent data?

Our identity graph, the **Criteo Shopper Graph**, contains our exclusive intent data. Our technology observes real-time browsing and purchasing behaviors to see **real customer journeys and purchase intent**, including:

2.5B+

active
online
shoppers

\$900B

annual
ecommerce
transactions

120+

intent
signals per
shopper

**Drive results on
every channel:**



Your
Website

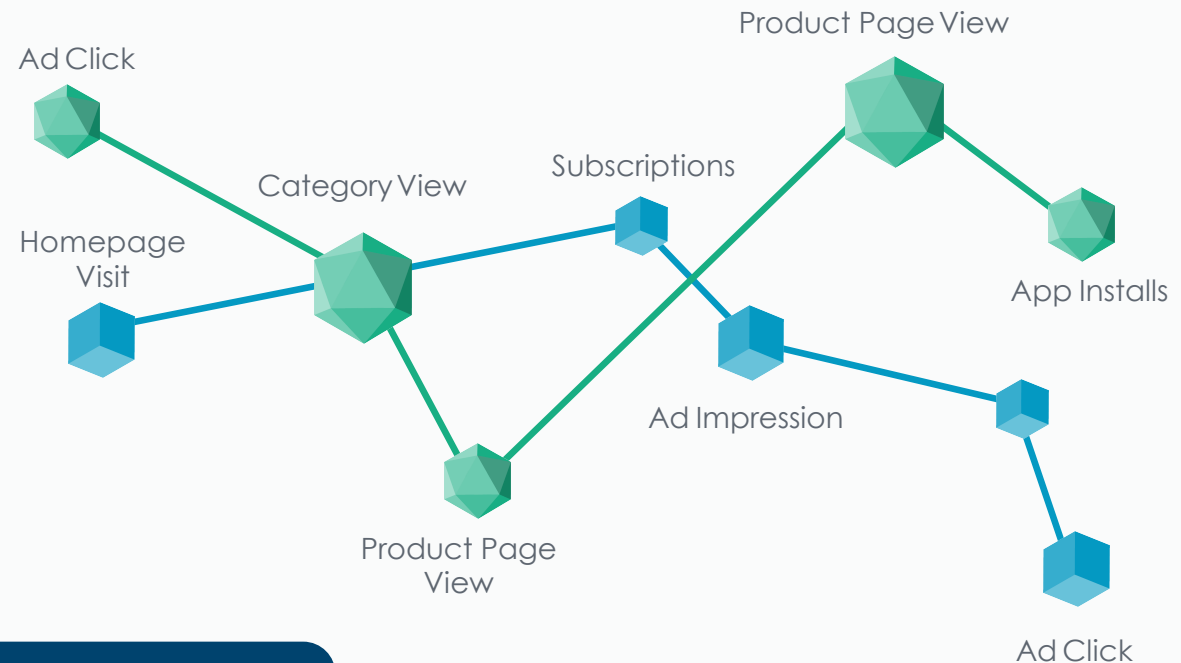


Your
App



Your
Stores

Connect the dots across all the channels where people shop:



For more festive season marketing insights, contact Criteo.



About Criteo

Criteo (NASDAQ: CRTO) is the global technology company powering the world's marketers with trusted and impactful advertising. 2,700 Criteo team members partner with over 20,000 customers and thousands of publishers around the globe to deliver effective advertising across all channels, by applying advanced machine learning to unparalleled data sets.

Criteo empowers companies of all sizes with the technology they need to better know and serve their customers. For more information, please visit www.criteo.com.

Appendix

Festive Season Shoppers: Sample Breakdown (The Netherlands)

By age group (generations)

Gen Z	N=176 (15%)
Millennials	N=243 (21%)
Gen x	N=309 (27%)
Boomers	N=378 (33%)
Silent	N=53 (5%)
Grand Total	N=1159 (100%)

By age group (ranges)

18-24	N=152 (13%)
25-34	N=179 (15%)
35-49	N=239 (21%)
50-64	N=331 (29%)
65+	N=258 (22%)
Grand Total	N=1159 (100%)

By gender

Female	N=554 (49%)
Male	N=583 (51%)

By household income

Under €18,000	N=119 (10%)
€18,000-31,999	N=235 (20%)
€32,000-44,999	N=217 (19%)
€45,000-69,999	N=213 (18%)
€70,000-89,999	N=98 (8%)
€90,000-119,999	N=50 (4%)
€120,000-180,000	N=21 (2%)
Above €180,000	N=19 (2%)
Prefer not to say	N=190 (16%)

Definition of age groups in the breakdown by generation; Gen Z: born after 1994 (under 26), Millennials: Born between 1981 and 1994 (26-39yo)
Gen X: born between 1965 and 1980 (39-55yo) Boomers: born between 1946 and 1964 (55-74yo) Silent: born before 1946 (74+)