2022 Black Friday E-commerce Results
In the Current Economic Climate

December 6, 2022
3pm CET | 2pm GMT

Roberto van Taunay, Commercial Leader E-Commerce Western Europe Zone
Guillaume Coudry, Chief Customer Officer Foxintelligence
The macro economic environment is faced with unprecedented change

- Ukraine crisis
- Disruption in China
- Financial constraints
- Soaring inflation
- Price volatility
- Rising raw material costs
- Supply chain delays & disruptions
- Worker shortages
- Increased interest rates
- Continued pandemic conditions
- Environmental changes
- Tech Adoption & Digitalization
- Shifted Retail Landscape
- Reduction in carbon footprint & (Micro) Plastics
- Geopolitical instability
Everything is pointing to e-commerce continued acceleration

Shop online to get better deals as a strategy to balance grocery spend

Source: NielsenIQ Consumer Outlook Survey July 2022

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Did online shoppers in the top 5 European markets rally for Black Friday this year?
Black Friday is the hottest day of the year in e-commerce... but Amazon Prime Days are not to be taken lightly

Black Friday online participation rate in EU5
Share of active online shoppers on Friday November 25, 2022

<table>
<thead>
<tr>
<th>Country</th>
<th>Participation Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>de</td>
<td>15%</td>
</tr>
<tr>
<td>es</td>
<td>13%</td>
</tr>
<tr>
<td>it</td>
<td>10%</td>
</tr>
<tr>
<td>uk</td>
<td>9%</td>
</tr>
<tr>
<td>fr</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: Foxintelligence by NielsenIQ, all product categories, services excluded
Black Week? Black Month? When did Black Friday actually start this year?

Daily online purchases index in value in Q4 2022 in EU5

Source: Foxintelligence by NielsenIQ, all product categories, services excluded
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On average, over the last year, daily online purchases during Black Friday were twice as high as a regular day in e-commerce.

Weight of the 10-day Black Friday period over the last 52 weeks online sales:

- Germany: 6%
- Italy: 6%
- Spain: 5%
- UK: 5%
- France: 5%

Source: Foxintelligence by NielsenIQ, all product categories, services excluded
This year Black Friday attracted more online shoppers than in 2021.
Germany has the highest penetration & average online spend.

Black Friday (10-day period) online participation rate in EU5
100% = Active online shoppers over the last 52 weeks

<table>
<thead>
<tr>
<th>Country</th>
<th>2021 10J</th>
<th>2022 10J</th>
</tr>
</thead>
<tbody>
<tr>
<td>de</td>
<td>48%</td>
<td>46%</td>
</tr>
<tr>
<td>uk</td>
<td>46%</td>
<td>43%</td>
</tr>
<tr>
<td>fr</td>
<td>43%</td>
<td>39%</td>
</tr>
<tr>
<td>it</td>
<td>39%</td>
<td>35%</td>
</tr>
<tr>
<td>es</td>
<td>35%</td>
<td></td>
</tr>
</tbody>
</table>

Average online spend per shopper during Black Friday:
- Germany: €197
- France: €182
- Italy: €164
- UK: €164
- Spain: €123

Source: Foxintelligence by NielsenIQ, all product categories, services excluded
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**Black Friday participation is particularly marked among Millennials, while it is much lower among Generation Z**

<table>
<thead>
<tr>
<th>Generation</th>
<th>Participation rate</th>
<th>Average online shopper spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generation B [1959-]</td>
<td>36%</td>
<td>157 €</td>
</tr>
<tr>
<td>Generation X [1960-1979]</td>
<td>46%</td>
<td>205 €</td>
</tr>
<tr>
<td>Generation Z [1995-]</td>
<td>37%</td>
<td>147 €</td>
</tr>
</tbody>
</table>

Source: Foxintelligence by NielsenIQ, all product categories, services excluded

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Which categories performed best online during Black Friday?
Electronics & Computers is, as past years, the #1 category during Black Friday, except in the UK where it falls to #3

Category mix in value during Black Friday 2022

<table>
<thead>
<tr>
<th>Country</th>
<th>Electronics &amp; Computers</th>
<th>Fashion</th>
<th>Home &amp; Appliances</th>
<th>Culture &amp; Games</th>
<th>FMCG</th>
<th>DIY &amp; Garden</th>
<th>Sports &amp; Auto</th>
</tr>
</thead>
<tbody>
<tr>
<td>de</td>
<td>28%</td>
<td>36%</td>
<td>11%</td>
<td>13%</td>
<td>4%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>es</td>
<td>36%</td>
<td>33%</td>
<td>13%</td>
<td>17%</td>
<td>4%</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>it</td>
<td>33%</td>
<td>33%</td>
<td>13%</td>
<td>17%</td>
<td>4%</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>uk</td>
<td>21%</td>
<td>21%</td>
<td>13%</td>
<td>15%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>fr</td>
<td>28%</td>
<td>36%</td>
<td>11%</td>
<td>13%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

FMCG includes:
- Food
- Beverages
- Personal Care
- Beauty
- Baby Products
- Pets
- Home Care

Source: Foxintelligence by NielsenIQ, all product categories, services excluded
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FMCG increased its share in the 2022 online Black Friday edition in all top 5 European markets

Weight of FMCG in value over total e-commerce sales during Black Friday 2021 & 2022

FMCG includes:
• Food
• Beverages
• Personal Care
• Beauty
• Baby Products
• Pets
• Home Care

Source: Foxintelligence by NielsenIQ, all product categories, services excluded
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Within FMCG, Beauty & Personal Care categories had some of the strongest online sales uplift during Black Friday

**Highest Black Friday online sales uplift for the top Beauty & Personal Care categories**

<table>
<thead>
<tr>
<th>Category</th>
<th>Germany</th>
<th>Italy</th>
<th>Spain</th>
<th>UK</th>
<th>France</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fragrances</td>
<td>3,2</td>
<td>3,7</td>
<td>3,0</td>
<td>3,7</td>
<td>3,0</td>
</tr>
<tr>
<td>Dental Care</td>
<td>2,9</td>
<td>3,0</td>
<td>2,8</td>
<td>2,5</td>
<td></td>
</tr>
<tr>
<td>Shaving and Hair Removal</td>
<td>2,7</td>
<td>2,4</td>
<td>2,3</td>
<td>2,2</td>
<td>2,4</td>
</tr>
<tr>
<td>Hair Care</td>
<td>2,3</td>
<td>2,4</td>
<td>2,0</td>
<td>3,0</td>
<td>2,0</td>
</tr>
<tr>
<td>Make-up</td>
<td>2,3</td>
<td>2,4</td>
<td>2,3</td>
<td>2,0</td>
<td>2,0</td>
</tr>
<tr>
<td>Sex and Sensuality</td>
<td>2,2</td>
<td>2,4</td>
<td>2,1</td>
<td>2,0</td>
<td>1,3</td>
</tr>
<tr>
<td>Diet and Nutrition</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Foxintelligence by NielsenIQ, Beauty & Personal Care categories
Closing thoughts

• Despite current economic environment, Black Friday reached similar or higher levels in 2022, and more consumers are participating in Black Friday

• Important to understand the mechanics / rules:
  • Not 1 day; rather period of 10 days of increased sales
  • Business critical across categories, however, not all categories are leveraging the momentum equally; room for improvement
  • Online follows different key dates than offline
  • Don’t be “distracted”
  • For several e-merchants a first introduction moment to meet new shoppers
Find out more on how we can support your business with the most complete and accurate view of e-commerce.

Visit our website and contact us!

Thank you.