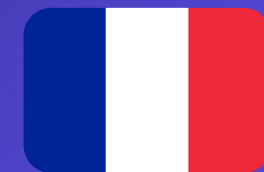


Holiday Expectations Survey Research



Sitecore conducted survey research among consumers ahead of the 2022 holiday season.

About the survey

- 1,089 French residents completed a 10-minute survey
- Survey was conducted Aug 30-31st, 2022
- Quotas were set to balance participants by age and gender

- Participants were recruited from an actively managed online panel
- Participants were incented using rewards points offered by their online panel

- Additional results can be found at <https://portal.Advanis.net/sc>
- The survey was conducted in five countries (UK, US, France, Germany, Australia)



Advanis is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. This research was sponsored by Sitecore and conducted by Advanis. For information about data collection, please contact *Lori Reiser, CAIP* (lori_reiser@advanis.net 519.340.0125)



French Shoppers are Planning Bigger Celebrations

1 in 3 French shoppers expect to spend more this holiday season, with that number increasing among higher income shoppers.

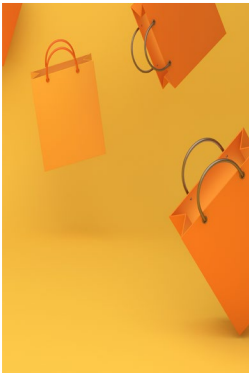
That isn't to say that affordability isn't a concern – half of parents plan to gift only for children, and 1 in 4 French plan to regift this year. However, feelings about the appropriateness of second hand gifts are mixed.



Omnichannel Christmas shopping with more online

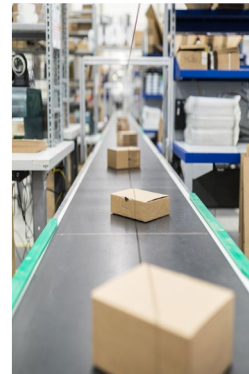
The top 3 reasons for choosing online shopping: shopping online is quick and easy (58%), the online experience is convenient (46%), they want to avoid crowds (46%).

73% of French shoppers indicate that a top priority for purchasing from online brands this Christmas season is early discounts and deals, up substantially from 2021 (54%).



More plan to shop Black Friday compared to 2021

Half of French shoppers said that they shopped on Black Friday last year with 61% planning to do so this year. Black Friday will be predominately an online shopping occasion, with 65% shopping online, and 35% shopping in person (21% of these doing both). Shoppers expect better deals on Black Friday.



The pull to shop is strong – even when working

45% of workers have done holiday shopping during the workday, while half of those of those that have shopped have done so in a secret browser.

Half of French consumers will pay an additional fee for express delivery, but for most, this will only be for specific or last-minute gifts. Free shipping is an important selling feature for online shoppers.

45%

of workers have done Christmas shopping during the workday with



49%

of those opening a secret browser to do so



51%

of parents: very likely to buy gifts for kids only



37%

of Gen Z will regift a present to save on costs



Despite eased restrictions on in-person shopping, online shopping continues to dominate with only **27%** planning to shop in-store more than online



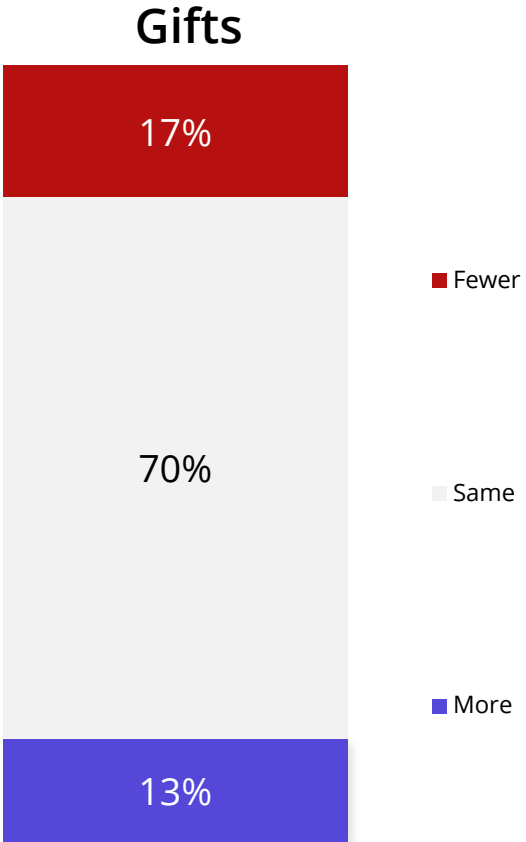
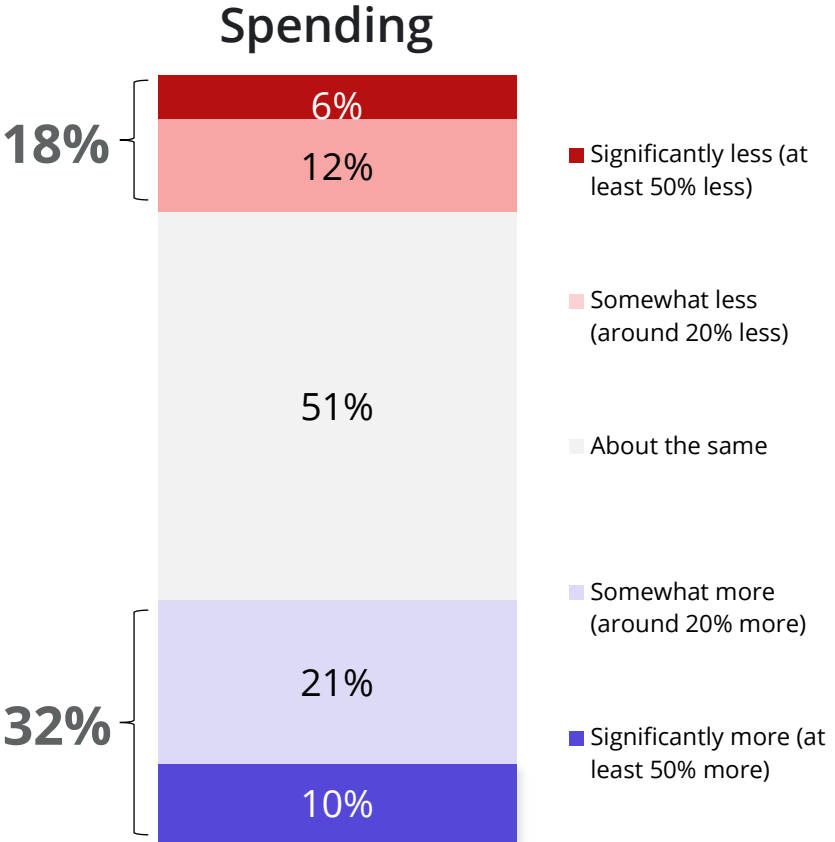
Gifts, particularly for kids, are considered 'must have' Christmas experiences, taking priority over spending time with family.

Budgeting



Planned Spending & Number of Gifts

1 in 3 French shoppers expect to spend more this year and for those with a higher income (over €75k) this increases to 38%. While they expect to spend more money this is not reflected in an increase in the number of gifts they plan to purchase.



Those with €75k or higher income are planning to spend more this year:

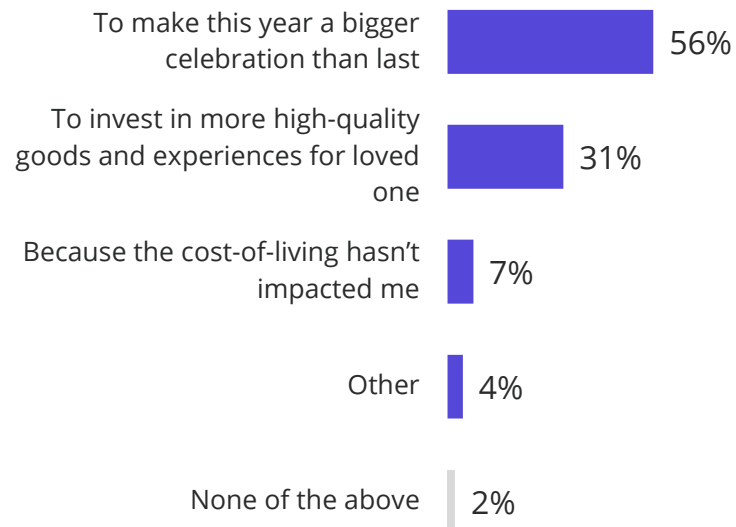
- 38% will spend more
- 26% will buy more gifts

q7t - How will your holiday spending this year compare to the 2021 holidays? Base: France (1,089)
q29 - Do you plan to buy more, fewer or the same number of gifts this year compared to last year? Base: France (1,089)
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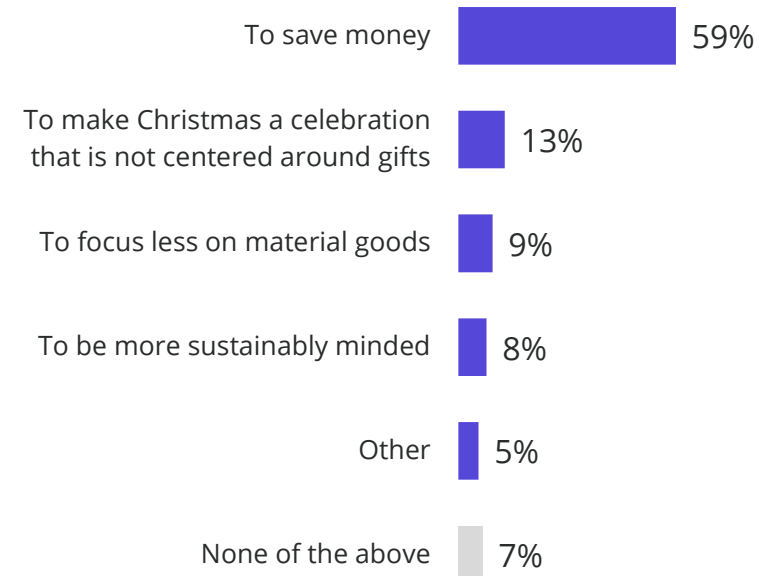
Why change spending this Holiday season?

Those who plan on purchasing more gifts want to make this a bigger celebration than last year and invest in higher quality gifts, while saving money is the most common reason to purchase fewer gifts.

More Gifts (13%)



Less Gifts (17%)



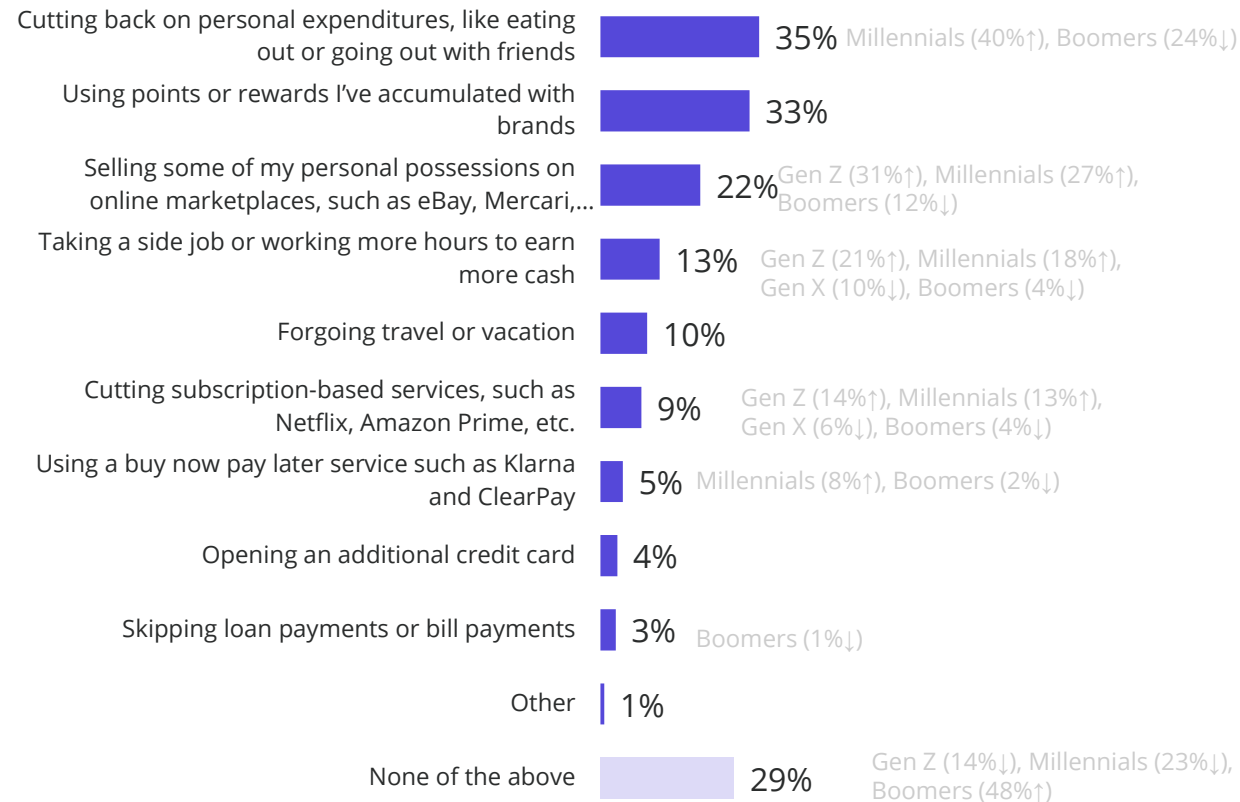
q29b - If more, what is the main reason? Base: France (144)

q29a - If fewer, what is the main reason? Base: France (184)

Ways to Afford the Holidays

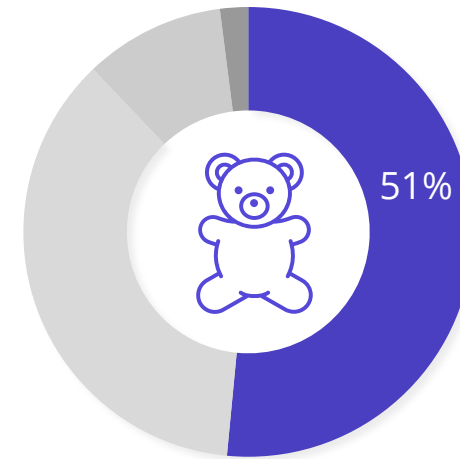
The most popular alternative ways to be able to afford this year's holiday season is to cut back on personal expenses and dip into rewards points.

Gen Z and Millennials are more likely to be looking for ways to make this season more affordable compared to Boomers.



Gifts just for the kids

In fact, 51% of parents say they are very likely to only buy gifts for the kids this year.



- Very likely
- Somewhat likely
- Unlikely
- Very unlikely

Re-gifting



1 in 4 will regift a present this year to save on costs (37% of Gen Z and 31% of Millennials).

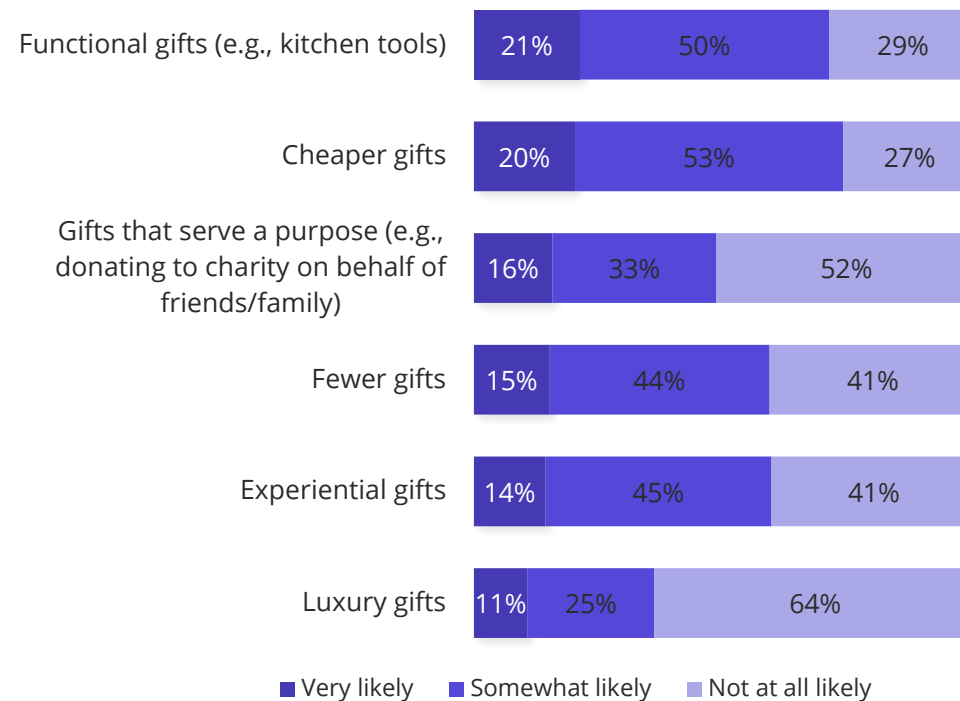
q4 - Will you be looking at any alternative ways to be able to afford spending more during this year's holiday season? Base: France (1,089)

q28- How likely are you to buy gifts just for the kids this year? Base: France; has kids under 18 at home (510)

q30 - Do you plan to re-gift presents this year to save on costs? Base: France (1,089)

Despite many planning to spend the same or more, there is a modest likelihood that French shoppers will prioritize functional and less expensive gifts this year.

Type of Gift

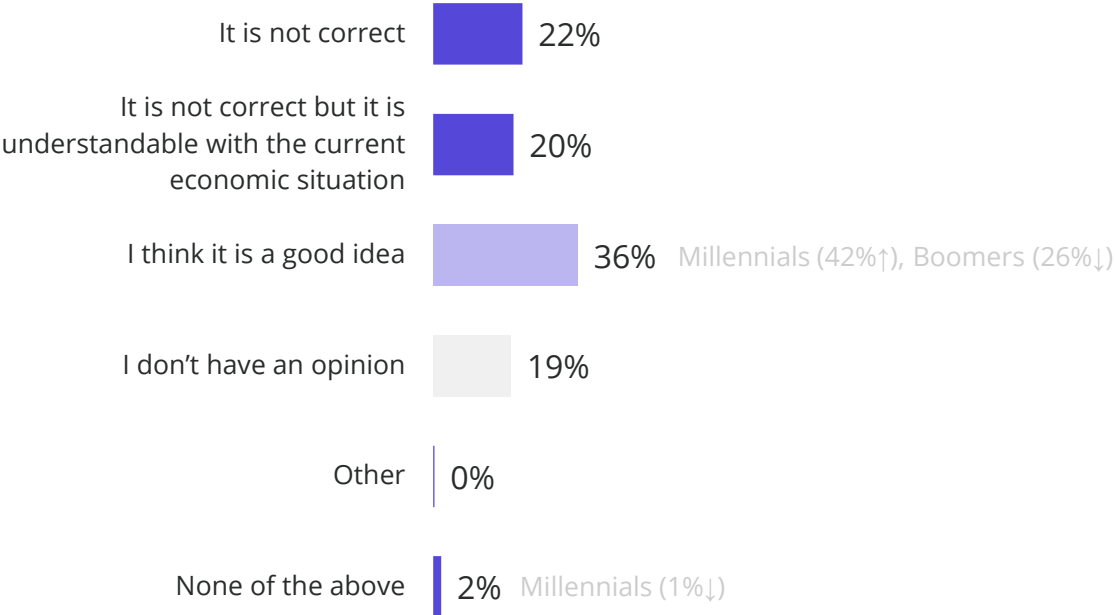


q9 - Will the type of gifts you plan to purchase this year change compared to 2021? Please rate by likelihood Base: France (1031, 1054, 976, 1044, 1000, 928)

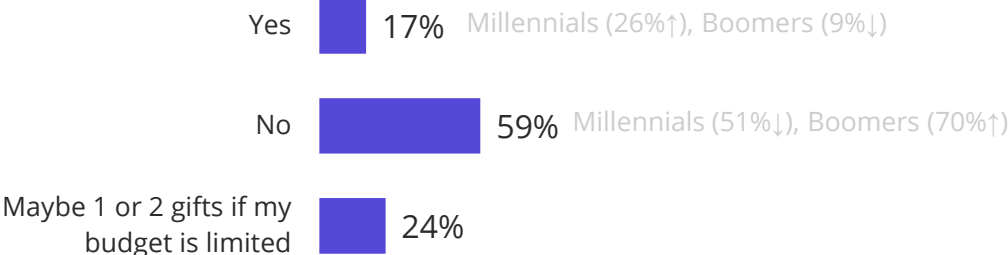
Opinions about buying secondhand products for a Christmas gift is mixed. Millennials are more likely to think that it is a good idea to buy secondhand products, and more are planning to buy them as Christmas gifts.

Vinted and Leboncoin are the top platforms for buying the gift.

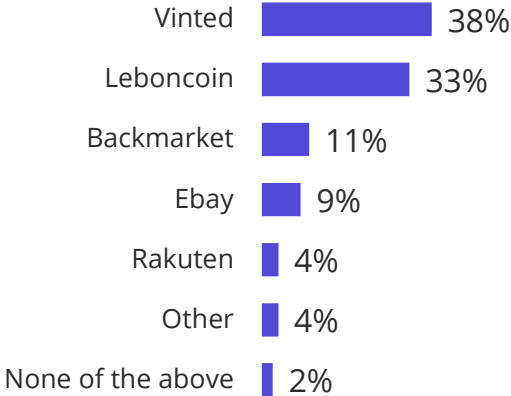
Thoughts on Buying



Plan to Buy Secondhand



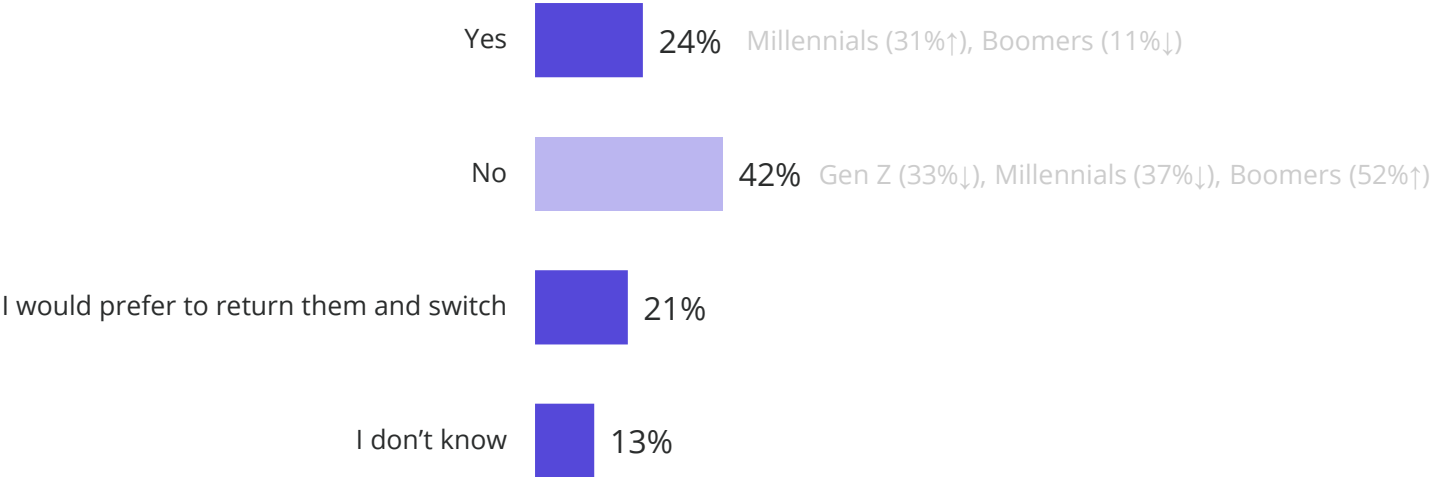
Platform to purchase



q35fr - What do you think about buying secondhand products for a Christmas gift? Base: France (1,089)
 q36fr - Do you plan to buy secondhand products as Christmas gifts? Base: France, excludes Don't know (968)
 q37fr - Over which platform would you most likely buy the gift? Base: France, yes purchase secondhand (161)
 Callouts: S0 (generations, age) - In what year were you born?
 Arrows indicate significance at the 95% level and the direction of change

4 in 10 French shoppers would not sell gifts that they do not like on a specific resale platform.

Selling Gifts

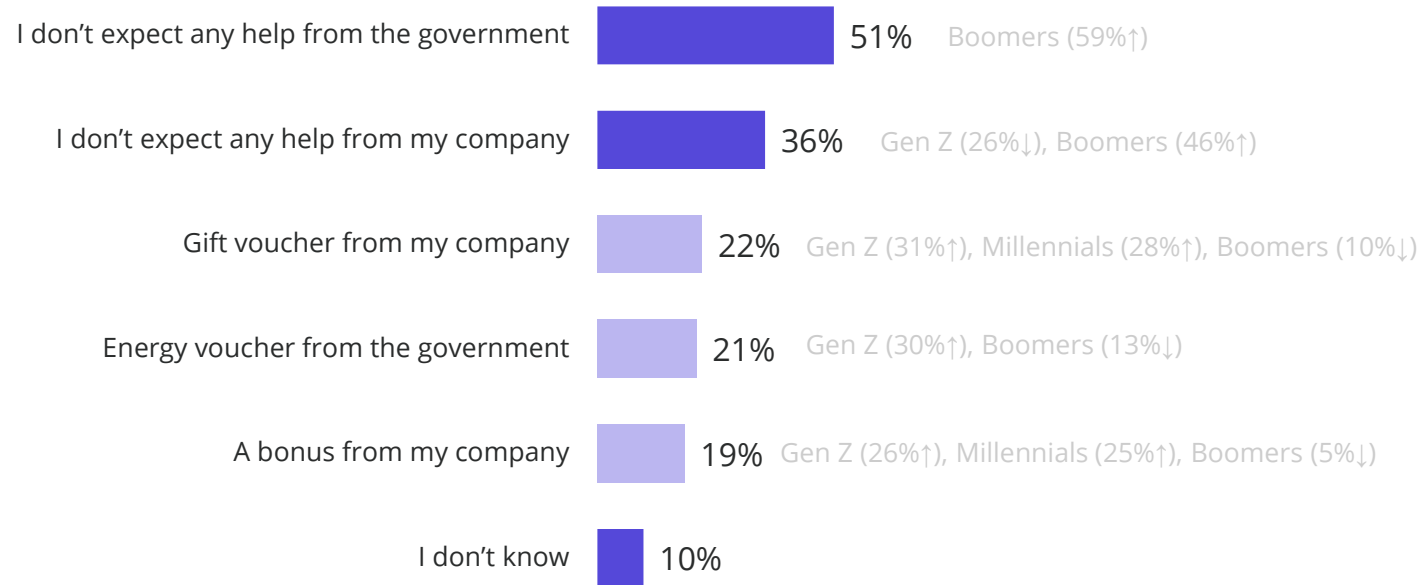


q38fr - If you don't like some of the gifts you receive, are you going to sell them over specific platforms? (1,089)
Callouts: S0 (generations, age) - In what year were you born?
Arrows indicate significance at the 95% level and the direction of change

Support for Christmas

Half of French shoppers do not expect any help from the government to support them this Christmas.

Boomers are most likely to expect support, while Gen Z are most likely to expect some support from their company or the government.



q39fr - Do you expect any kind of support (coup de pouce) for Christmas? 1,089

Callouts: S0 (generations, age) - In what year were you born?

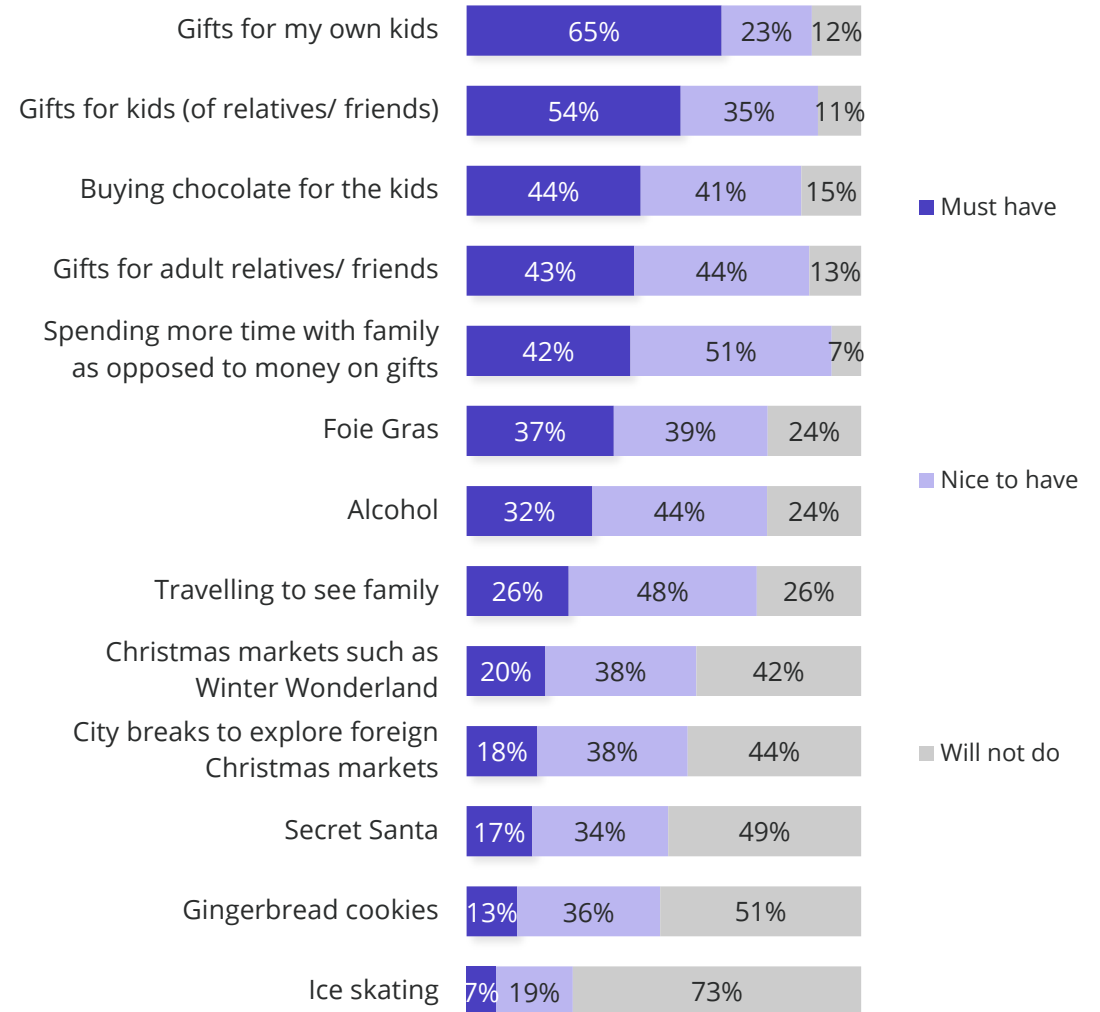
Arrows indicate significance at the 95% level and the direction of change

Priorities for the Christmas Season

Gifts, particularly for kids, are must haves for most families this Christmas.

Food also plays an important role, with Foie Gras (37%) and chocolate for kids (44%) a must have for ~4 in 10 people in France.

Time with family is important (4 in 10 say more important than gifts), but gifts seem to be more of a 'must have' this season.





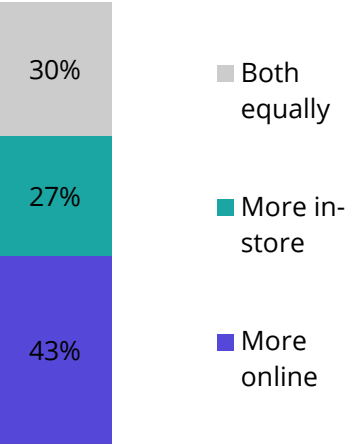
Online Shopping



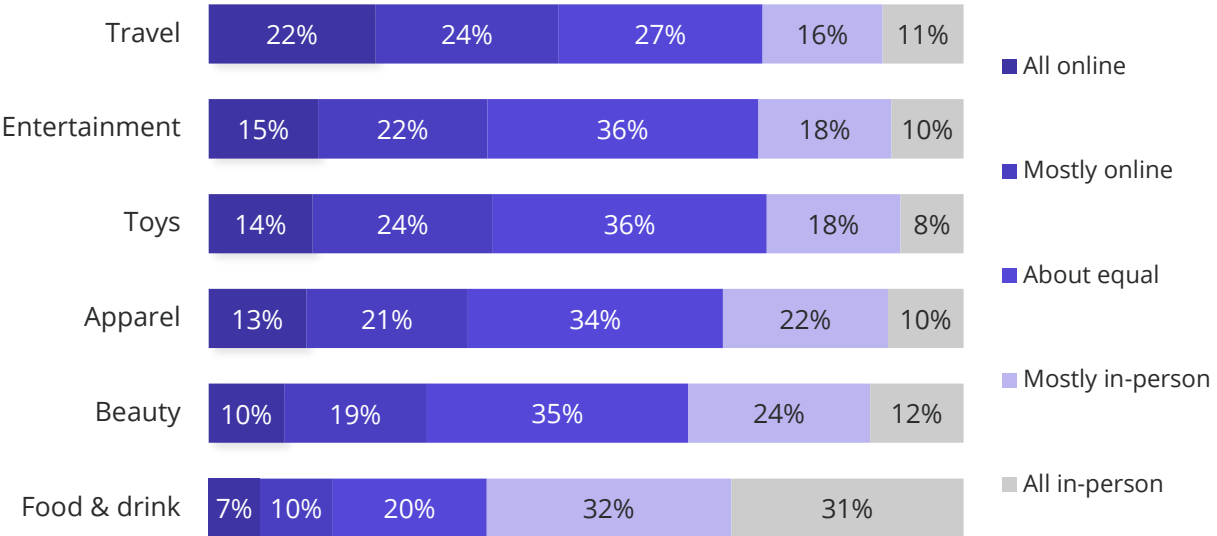
Despite eased restrictions on in-person shopping, online shopping continues to be the most common channel where people plan to shop, though many expect to shop both online and in-person for many categories of holiday shopping.

Younger generations are the most likely to say that most of their shopping will be online compared to the older generations.

Where Planning to Shop



Categories of Holiday Shopping



q20 - Where do you plan to shop more this holiday season – in-store or online? Base: France (1,089)
q24 - Thinking specifically about different categories of holiday shopping, how much do you plan to do online this year? [e2 from 2021 Consumer Survey] Base: France (1,089)

Online vs. In Person



Quick, easy, and convenient shopping are reasons that all ages prefer to shop online. Many are still actively avoiding crowds. 1 in 3 Gen Z say that the online experience is more personalised, more than other generations.



Even more than in 2021, early discounts and deals are highly valued by French shoppers (73% say this is a top priority, up from 54% last year). Suggestions that suit the shopper's lifestyle have also taken on higher importance (increasing from 32% to 41% in 2022).

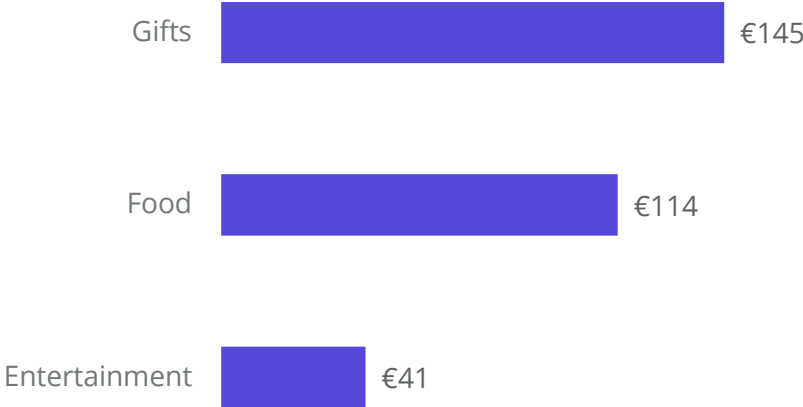
Priorities for Purchases



In our €300 spending scenario, gifts represent nearly half of the spend, followed by food, and entertainment with the lowest spend.

Women are significantly more likely to put a higher amount towards gifts than men, whereas men are more likely to put more towards entertainment.

How would you spend a €300 holiday budget



q8_a q8_b q8_c - Let's imagine you have €300 to spend overall this holiday season. How would you split your budget between the following three categories Base: France (1,089)

Black Friday

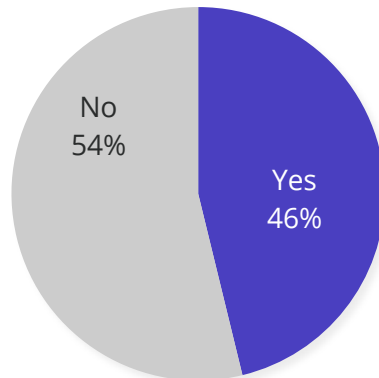


While under half of French shoppers indicated that they shopped on Black Friday last year, a significantly higher number (61%) plan to do so this year. Nearly all the Black Friday shopping is expected to be online – only 1 in 3 plan to shop in person.

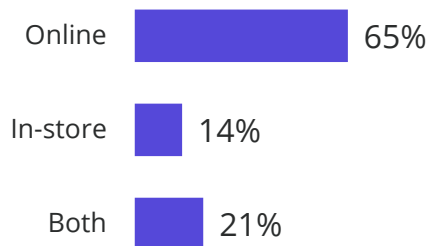
4 in 5 Gen Z say they are planning to shop on Black Friday this year compared to only half of Boomers.

The top reason for shopping on Black Friday is that it offers better deals and prices for gifts.

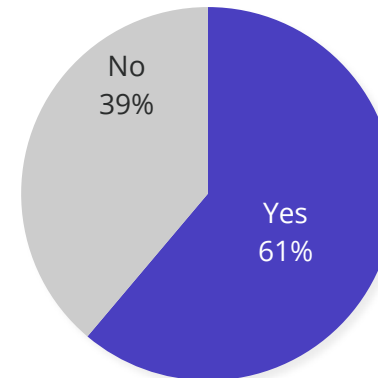
Shopped on Black Friday 2021



Shopping Where?



Planning to Shop on Black Friday 2022



- Black Friday no longer offers good deals (24%)
- I prefer shopping for gifts closer to Christmas (23%)
- I am cutting back on holiday gift shopping this year (21%)

- Black Friday offers better deals and prices for buying gifts (75%)
- Shopping on Black Friday will help me spread out my spending (35%)
- It will help me avoid the rush around last-minute holiday shopping (34%)

q18 - Did you shop for gifts on Black Friday in 2021? Base: France (1,089)

q19 - Are you planning to shop for gifts on Black Friday this year? Base: France (1,089)

q19a - Where are you planning to shop on Black Friday? Base: France who plan to shop (666)

q19b - Why are you planning to shop on Black Friday? France who plan to shop (666)

q19c - Why are you not planning to shop on Black Friday? [f10 from 2021 Consumer Survey] France who do not plan to shop (423)

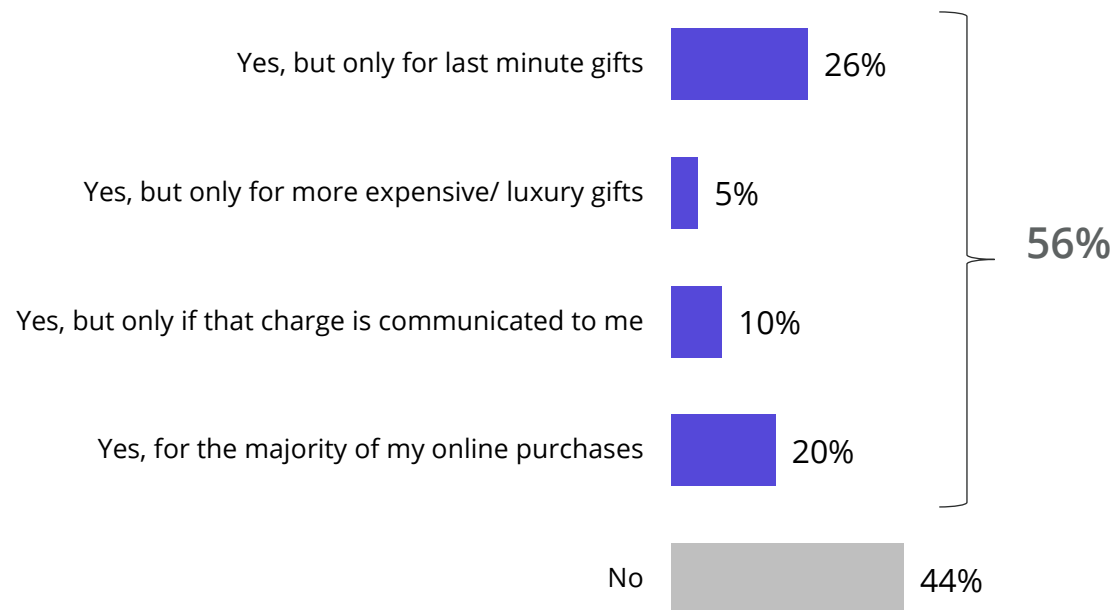
Shipping



Willing to spend for last minute gift shipment

Just over 50% would pay additional fees to ensure that gifts are delivered on-time, but for most, this will be limited to last-minute gifts. Being unwilling to pay an additional fee for delivery increases with generation, where 25% of Gen Z will not pay an additional fee, this increases to 35% of Millennials, 49% of Gen X, and 62% of Boomers.

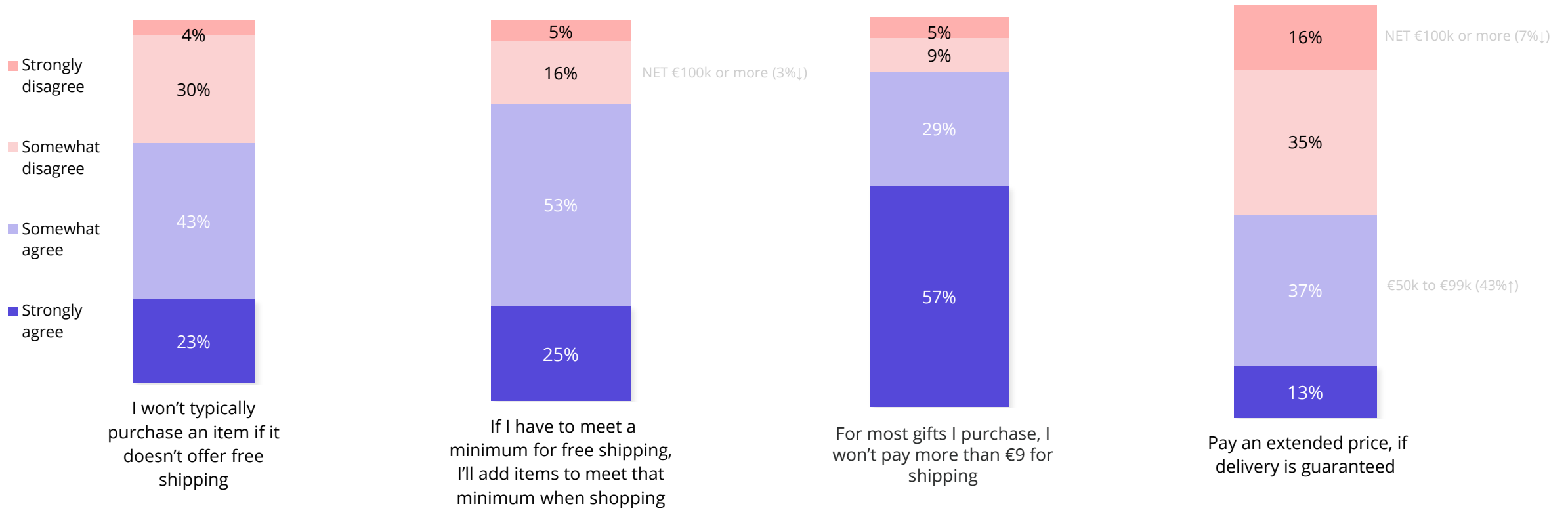
Additional fee for fuel/ express delivery



Shipping

For most, €9 represents a firm maximum shipping cost. Free shipping is a strong purchase incentive, even if a minimum order size is needed.

While nearly 2 in 10 Gen Z and Millennials strongly agree that they will pay extra for guaranteed delivery, only 1 in 10 Gen X and 1 in 20 Boomers strongly agree.



q8us3 - When it comes to shipping, do you agree with any of the following? Base: France (1,089)

Callouts: What was your total household income in 2021 before taxes (in €)?

Arrows indicate significance at the 95% level and the direction of change.

Free shipping, in consumers' minds, is as powerful as a significant cash discount on sale items.

“On Sale” Deals



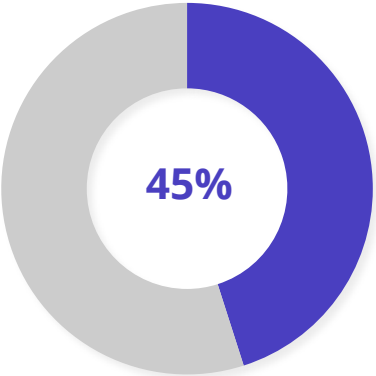
Shopping Trends



Clandestine Shopping

Just under half of workers say that they have shopped while at work, with Millennials most likely. Of those that have shopped at work, half have done so using a secret browser.

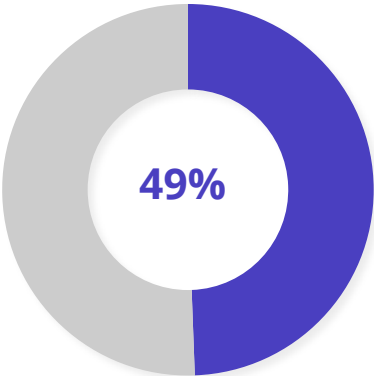
Shopping at work



Millennials (57%↑), Gen X (38%↓), Boomers (27%↓)

Have shopped during the workday or while working.

Secret Browser



Gen X (42%↓)

Opened a secret browser on work computer to shop.

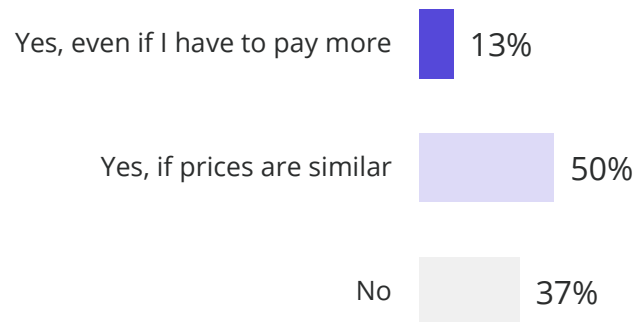
q8us5 - Do you, or have you ever done, holiday shopping during your workday or while you were working? Base: France, full or part-time employed (750)

q8us6 - Have you ever opened a secret browser on your work computer so your employer wouldn't find out you were shopping during the workday? Base: France, full or part-time employed and have shopped at work (338)

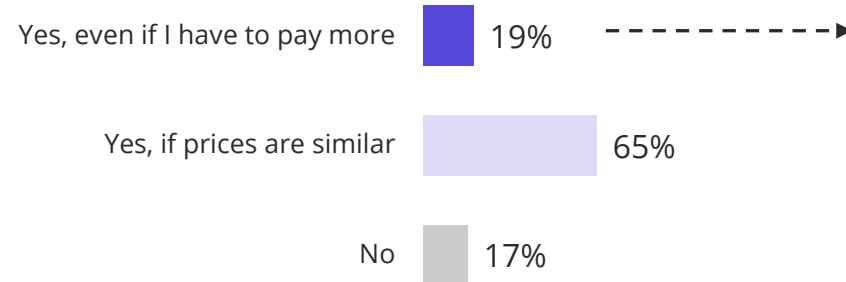
As long as prices are competitive, consumers in France will prioritize shopping with minority-owned businesses, local or small businesses, and French made products.

Millennials are more likely than other age groups to prioritise shopping with local or small businesses even if they have to pay more.

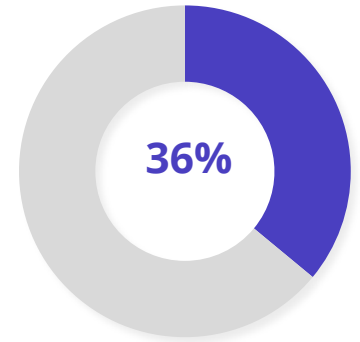
Prioritise shopping with minority-owned businesses



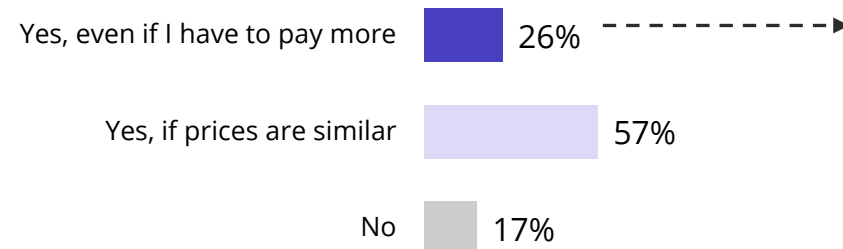
Prioritise Local or Small Businesses



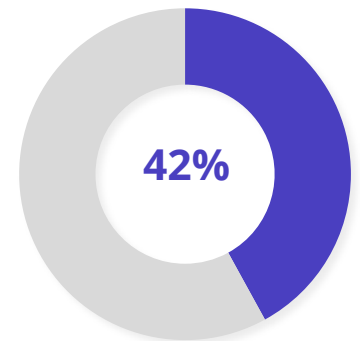
Income over 75k



Prioritise French Made Products



Income over 75k

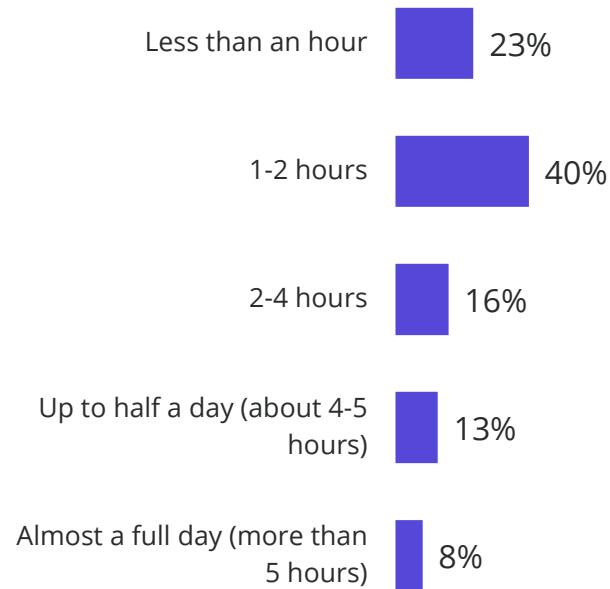


q8us8 - Will you actively seek out or prioritise shopping with minority owned businesses? Base: France (1,089)
q8us7 - Will you prioritise shopping with local or small businesses this holiday season? Base: France (1,089)
q8us9 - Will you actively seek out or prioritize buying French made products this holiday season? France (1,089)
Callouts: d3- What was your total household income in 2021 before taxes, (in €)?

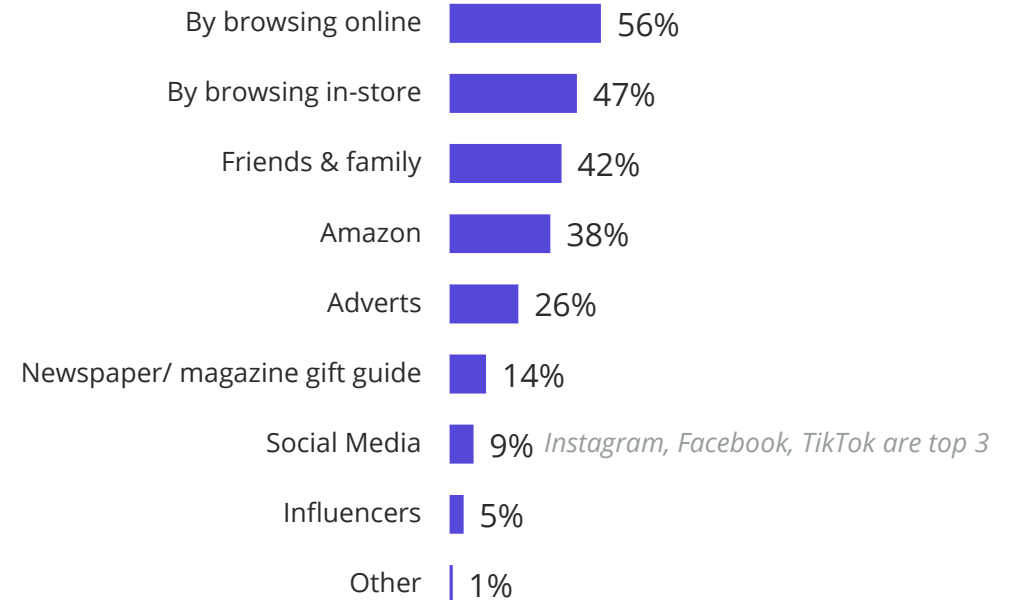
Sources of Inspiration for Gifts

Browsing online is the most popular way to get gift inspirations this holiday, with browsing in-store a very close second. 1 in 5 Gen Z will look for inspiration from social media compared to only 1 in 20 Boomers.

Gift Researching



Sources of Inspiration (% rated in top 3)



q8us1 - If you have a specific gift in mind, how long will you spend researching and comparing prices for that item before you buy it? Even if you spend time over several days coming back to an item... Base: France (1,089)

q23 - Where are you going to get gift inspirations from this holiday season? Base: France (1,089)

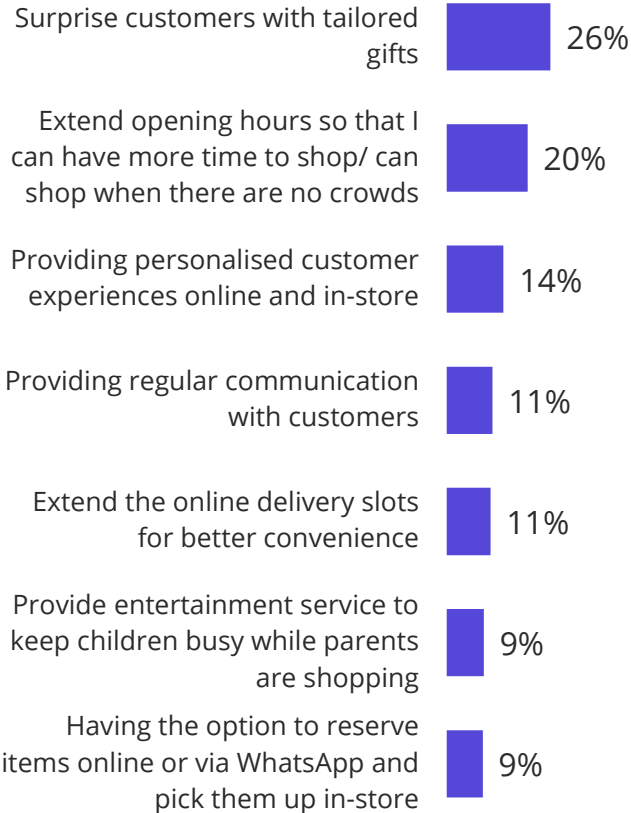
Callout: q23a - Which social media platforms are you going to get gift inspirations from this holiday season?

How Retailers can make Christmas memorable



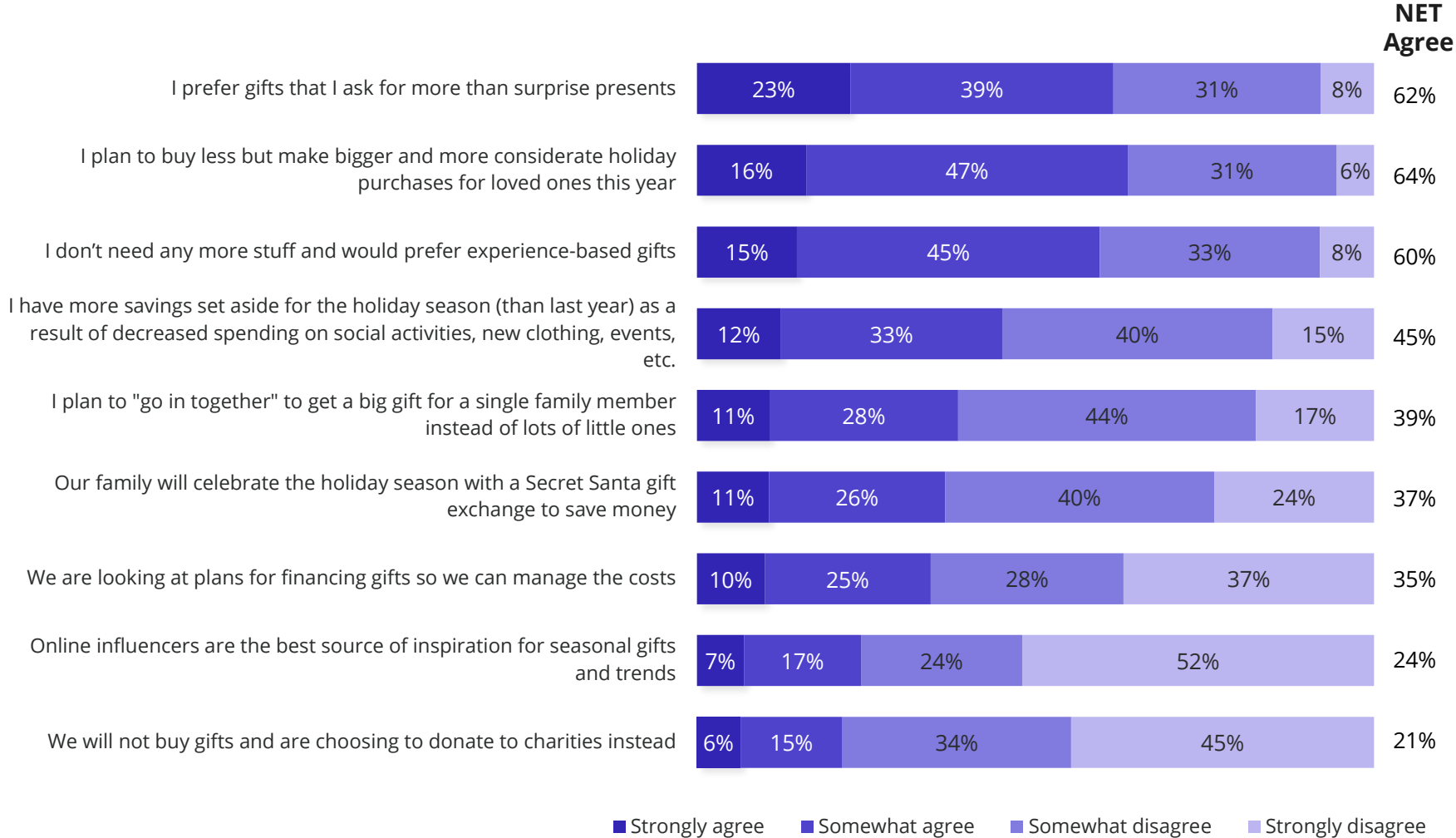
Receiving surprise tailored gifts is the top way that French shoppers indicated retailers could make their Christmas more memorable. Personalized experiences and extended store hours were also valued.

Males were more likely than females to indicated that extending opening hours would be important, with Gen Z indicating the most important would be providing personalised customer experiences.



q31 - Other than being mindful on the cost, what else could retailers do to help make Christmas more memorable this year? Base: France (1,089)
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Gifting Wishlist



q14 - To what extent do you agree with the following? [f3_a from 2021 Consumer Survey] Base: France (1,089)

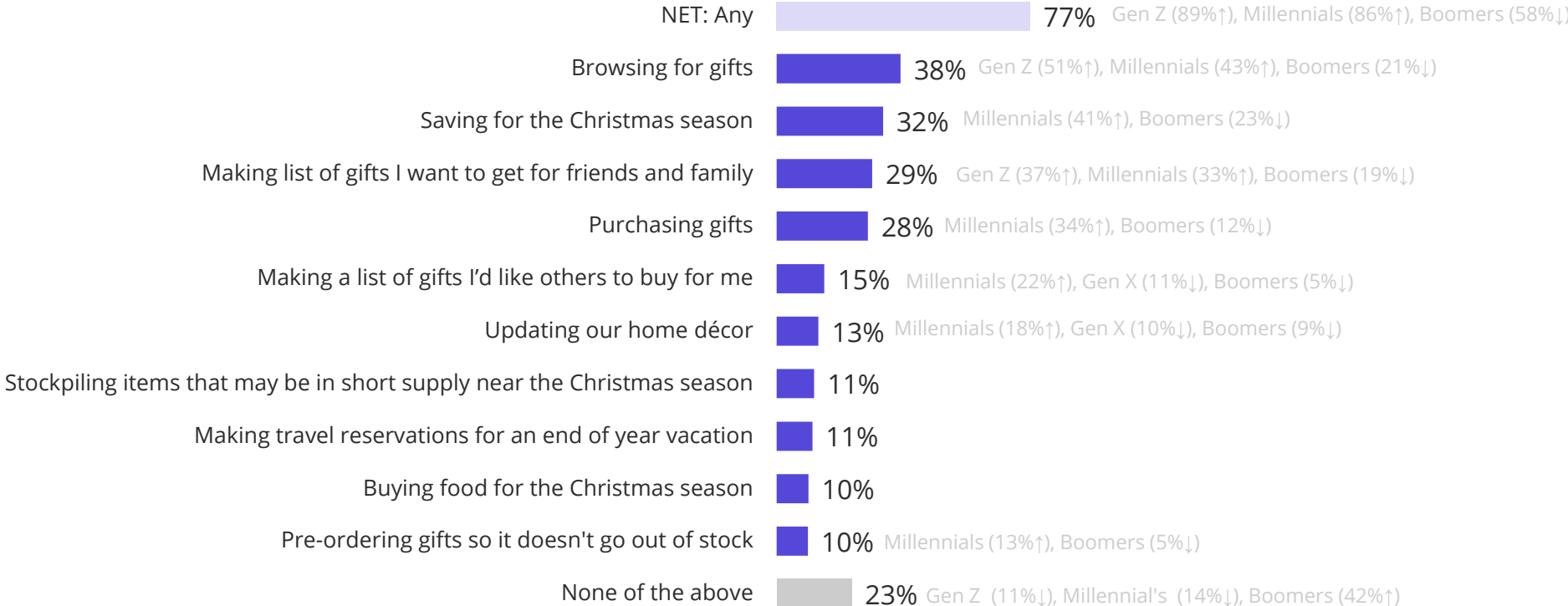
Timing of Holiday Shopping



Holiday Shopping Timing



A high proportion of French shoppers have started thinking about the holiday season, with gift browsing and saving the most common activities being undertaken. Boomers are the only least likely to have started doing any of the activities where Gen Z and Millennials are more likely to have started all the activities.

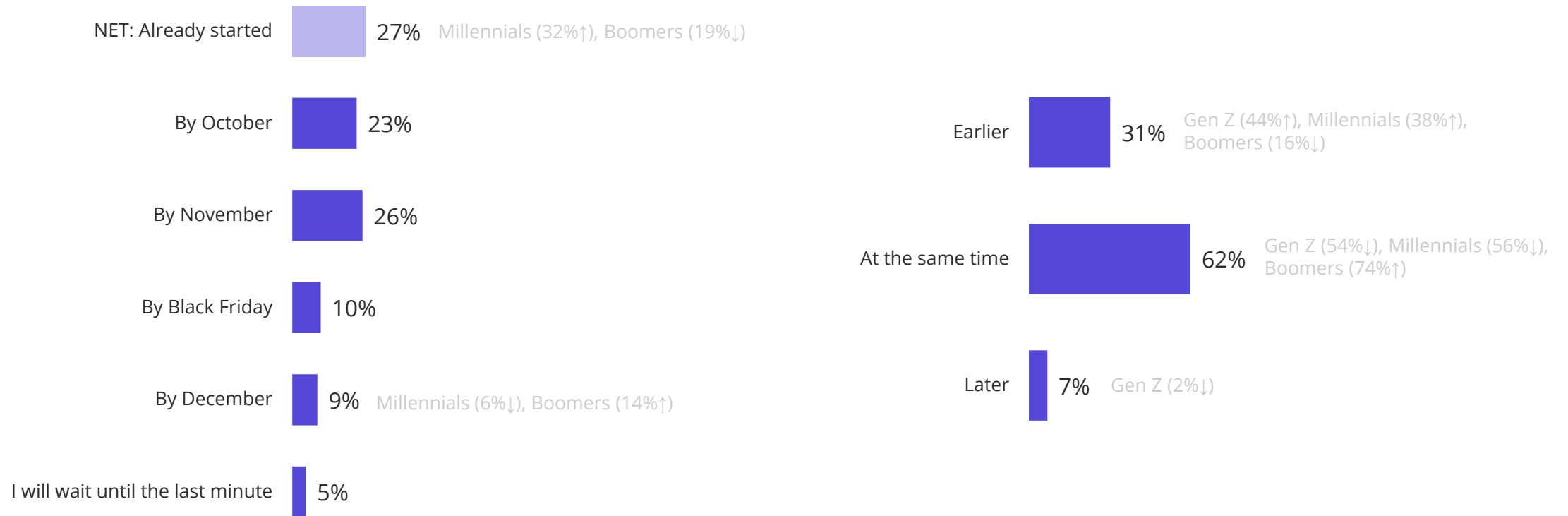


q3 -Have you started doing any of the following for the holidays this year? Base: France (1,089)

Holiday Shopping Timing

1 in 4 French consumers have already started holiday shopping this year. For most, October and November are the most popular times to start shopping, though a significant number of Boomers will wait until December to start shopping.

This is not a divergence from the time they shopped last year, though 1 in 3 say they will start shopping earlier and this is even higher for Gen Z and Millennials.



q1fr - When did/ do you plan to start your 2022 holiday (e.g., Christmas, Hanukkah, Diwali, New Year's) shopping this year? Base: France (1,089)

q2 - Compared to last year, did/do you plan to start holiday shopping... Base: France (1,089)

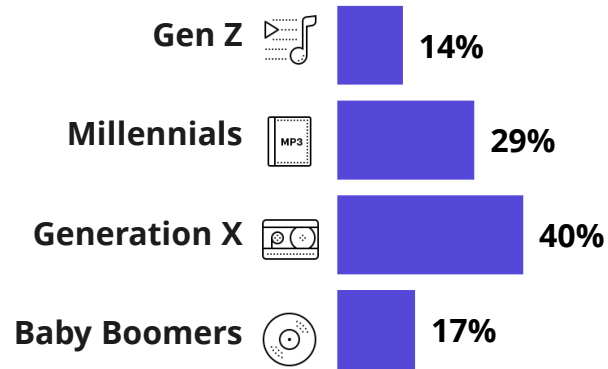
Callouts: S0 (generations, age) - In what year were you born?

Arrows indicate significance at the 95% level and the direction of change.

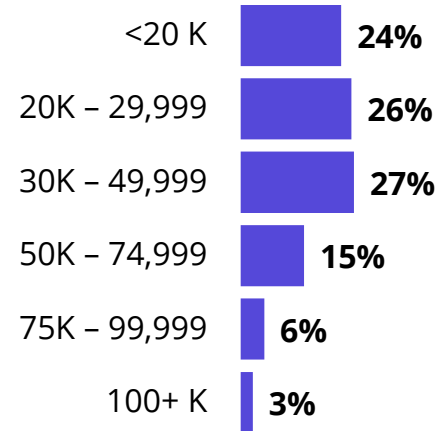
Respondent Profiles



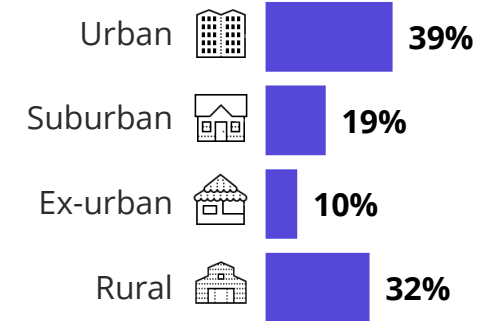
Generations



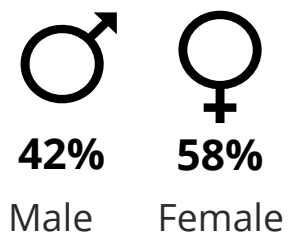
Annual Income



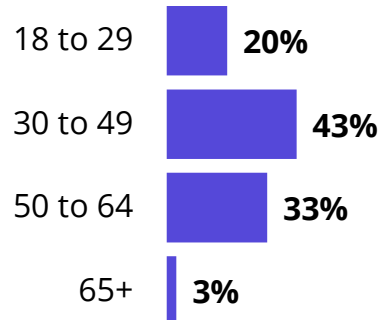
Neighbourhood



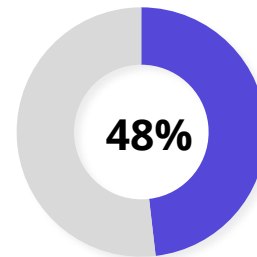
Gender



Age

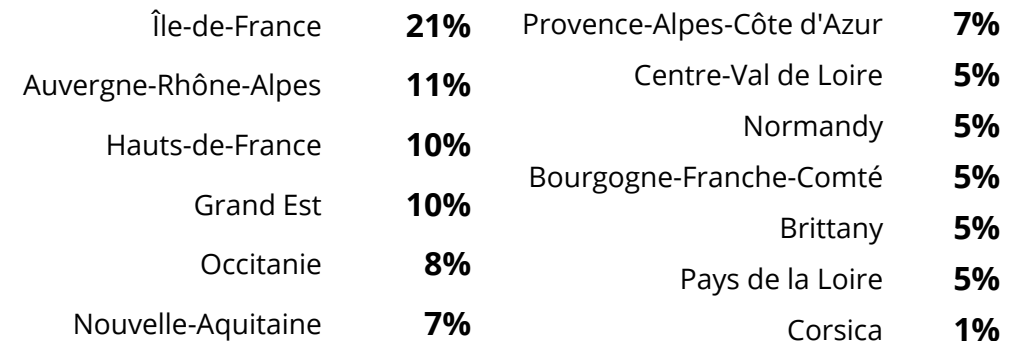


Children at Home



with at least one child at home.

Region



S0 (generations, age) – In what year were you born? Base: France (1,089)

D3 – What was your total household income in 2021 before taxes (in €)? Base: France, excludes 'prefer not to say' (1,037)

D5 – How would you describe your neighborhood? Base: France, excludes 'prefer not to say' (1,078)

S2 – How do you identify yourself? Base: France, excludes 'prefer not to say' (1,082)

D4 – Do you have children under the age of 18 living in your home? Base: France, excludes 'prefer not to say' (1,059)

D1FR (region) – Where specifically do you live? Base: France (1,087)

Appendix

The holiday season will be the highlight of my year...	2021	2022
NET: Agree	59%	65%
Strongly agree	17%	25%
Somewhat agree	41%	40%
Somewhat disagree	28%	26%
Strongly disagree	13%	9%

How are you hoping to celebrate the holiday season?	2021	2022
A simple celebration with my close family	51%	58%
Multiple gatherings with friends and family throughout the Christmas season	13%	23%
A special New Year's eve celebration	18%	15%
A larger than normal celebration with extended family	12%	14%
A big party with friends	16%	13%
Going to get in the festive spirit early this year	15%	7%
Day trips / short stay vacations within my country	11%	6%
Longer vacations within my country	8%	6%
A lavish vacation abroad	7%	5%
Other	1%	1%
Nothing, I don't plan to celebrate	12%	8%

q13 - The 2022 holiday season will be the highlight of my year: To what extent do you agree ...? Base: France (1,089)

[f3_a from 2021 Consumer Survey] Base: France consumer (1,001)

q10 - How are you hoping to celebrate the 2022 holiday season (e.g., Christmas, Hanukkah, Diwali, New Year's)? Base: France (1,089)

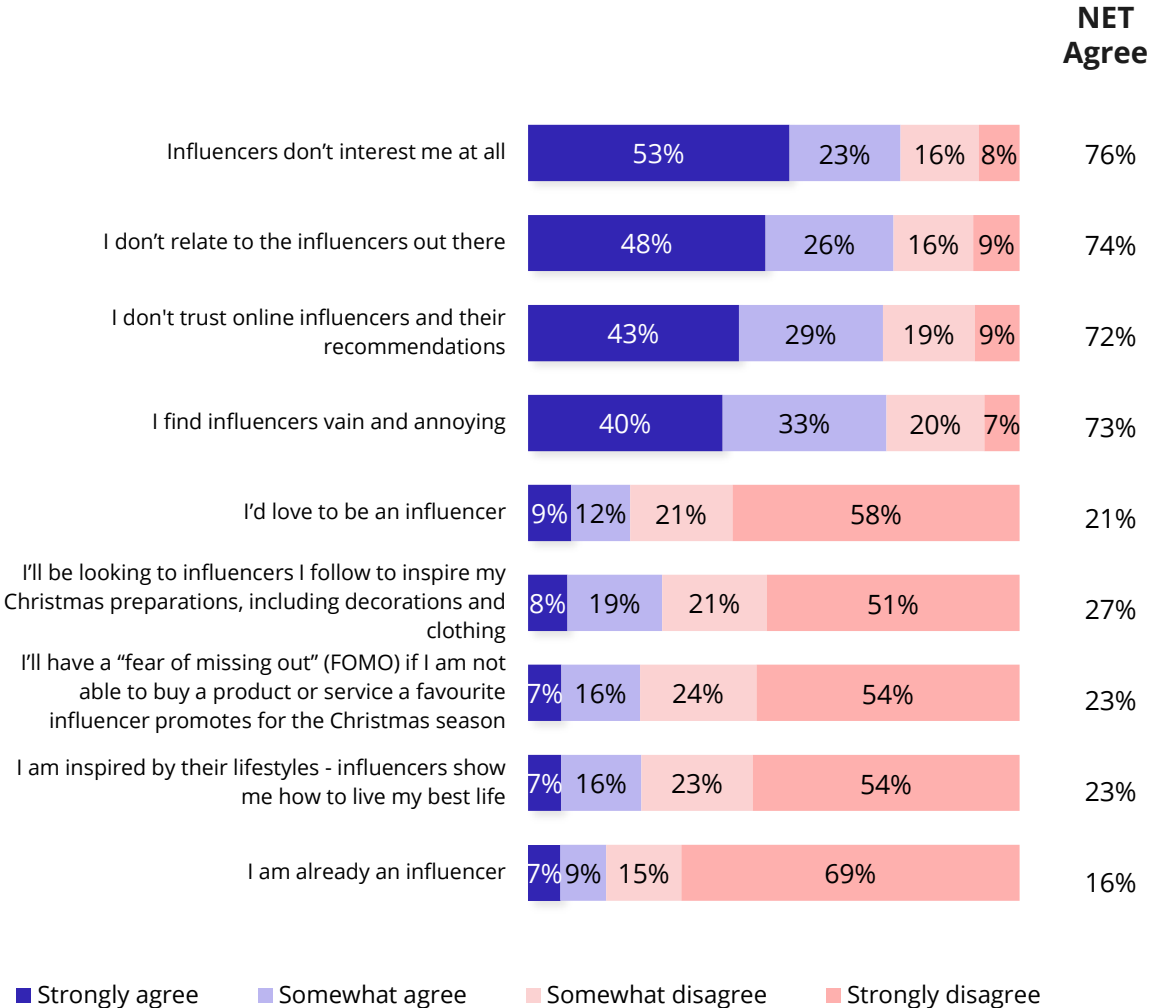
[C6a from 2021 Consumer Survey] Base: France consumers (1,001)

2021 results

q6_net_agree - [Summary table, NET Agree] To what extent do you agree with the following attitudes about online 'influencers'?

	Total	age - In what year were you born? (Recorded, Buckets)	
		NET 18-44	NET 45+
I'll have a "fear of missing out" (FOMO) if I am not able to obtain a product or service a favorite influencer presents for the holiday season	31%	44% S↑	18% S↓
I'll be looking to influencers I follow to inspire my holiday preparations, including decorations and clothing	33%	49% S↑	18% S↓
I don't trust online influencers and their recommendations	75%	69% S↓	81% S↑
I don't relate to the influencers out there	77%	68% S↓	85% S↑
I'd love to be an influencer	31%	48% S↑	15% S↓
I find influencers vain and annoying	72%	66% S↓	78% S↑
I am inspired by their lifestyles - influencers show me how to live my best life	31%	46% S↑	17% S↓
I am already an influencer	22%	33% S↑	12% S↓
Influencers don't interest me at all	79%	69% S↓	88% S↑

Weight: Unweighted
Filters: None
 Upper case letters indicate significance at the 95% level.
 Arrows indicate the direction of a statistically significant change.
 Each column is compared to the sum of all other columns, excluding itself.





Thank you

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