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How We Shop

Shopper Story 2020

France
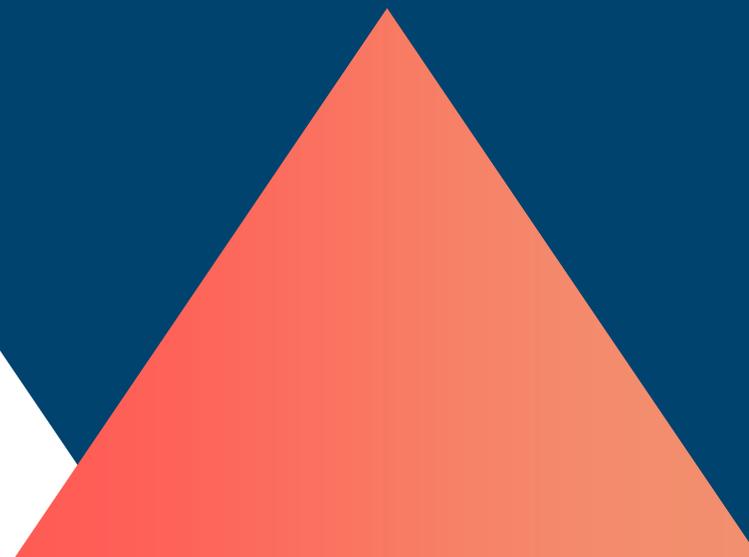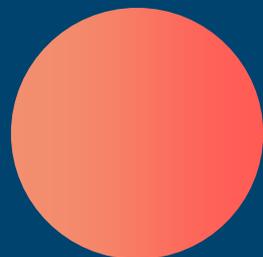
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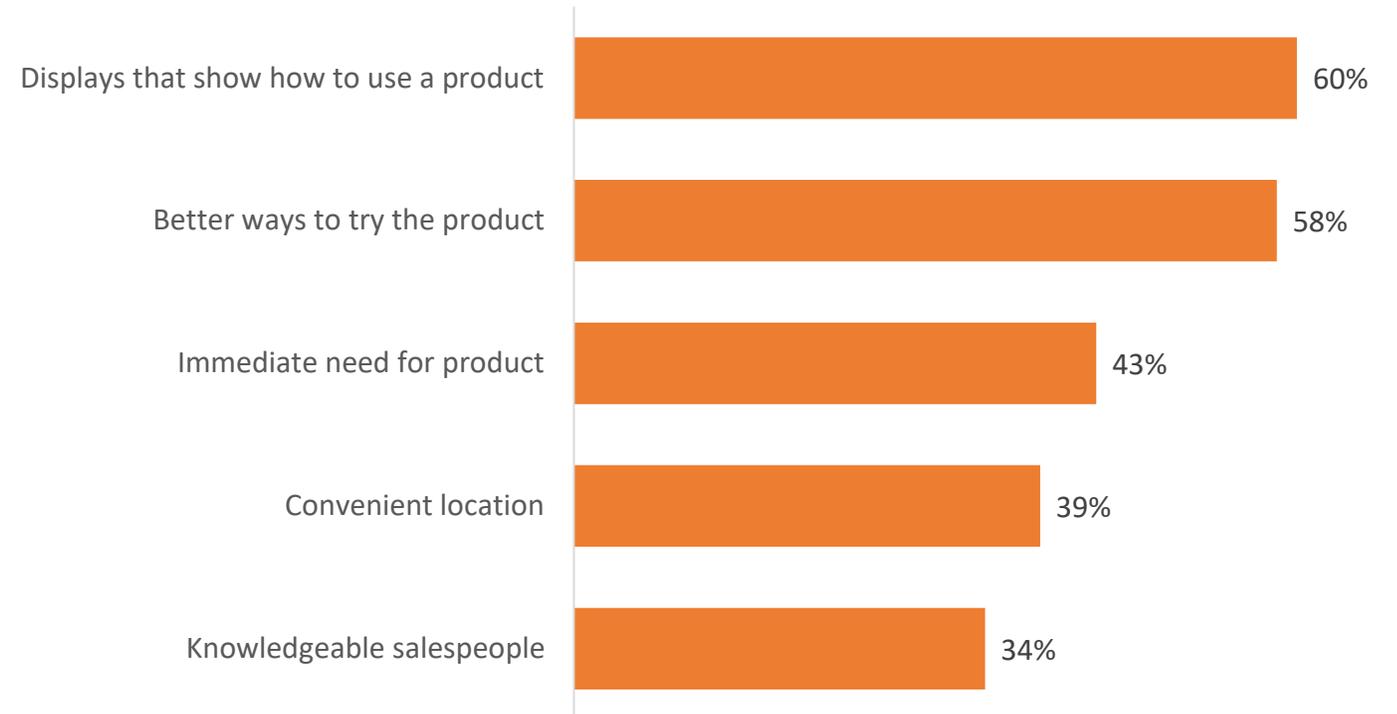
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What Matters to Shoppers Today

Shoppers turn to retail/brand stores for better ways to try and use products

In France, shoppers prefer going to retail/brand stores to try and find better ways of using products.

Proximity and immediate need for the product are also important drivers for store visits.

What makes you more likely to shop in a retail/brand store?

Displays that show how to use a product	60%
Better ways to try the product	58%
Immediate need for product	43%
Convenient location	39%
Knowledgeable salespeople	34%

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Shopping in stores brings specific benefits to large groups of consumers

When they have time, the older generations like to shop in stores more than Gen Z's and Millennials.

Also, the older generations have greater preference to see and touch items in stores before buying.

How much do you agree with the following statements?

I look forward to shopping in stores when I have the time	I enjoy shopping in stores to understand what is in style or new at the moment	I don't like to purchase new items unless I can see and touch them in a store

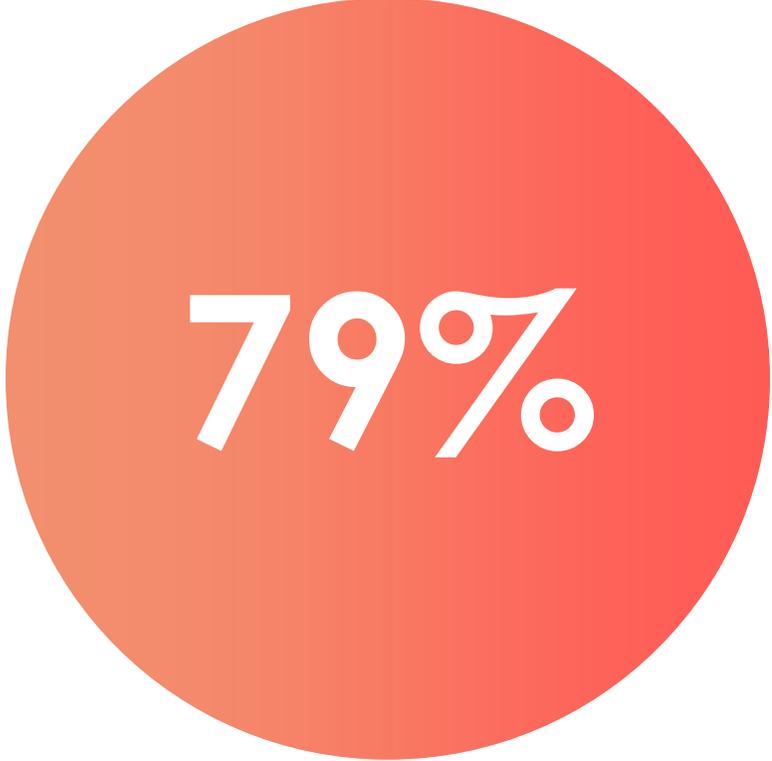■ Gen Z & Millennials   ■ Gen X   ■ Boomers & Silent

Definition of age groups used: Gen Z: born after 1994 (under 25), Millennials: 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+)

Source: Criteo Shopper Story, France, July-August 2019, N=460

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Discounts/coupons by email, online ad, store's app, postal mail and print media fuel in-store and online transactions

Shoppers confirming they use coupons and discounts

Statement	Percentage	Gen Z & Millennials
I look through and sometimes save coupons that I receive in the mail	69%	
I clip coupons at home and use them in the store	67%	
I always take and use in-store coupons when available	60%	
Email discount codes/offers motivates me to make a purchase	52%	Gen Z & Millennials: 66%
I often search for coupons online before making a purchase	51%	Gen Z & Millennials: 60%
I print out coupons from the Internet and use them in store	47%	
I use a store's app to get coupons or discounts	37%	Gen Z & Millennials: 46%
Discounts/coupons on social media sites motivate me to make a purchase	35%	

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79%

of all shoppers report using some kind of coupon or discount

Source: Criteo Shopper Story, France, July-August 2019, N=1007

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Peer reviews make operational excellence mandatory

A majority (57%) of shoppers confirmed they have recommended a company to someone based on a good experience they had.

A majority (53%) also confirmed having told someone about the negative experience they had with a company.

Consumers want to be positive – 68% of shoppers reported leaving a positive online review vs. a negative online review (46%) in the last six months.

In the last 6 months, have you?

	46%	53%	57%	68%
	Left a negative review about a bad customer experience	Told someone about a negative experience you had with a company	Recommended a company to someone based on a good experience	Left a positive review about a good customer experience

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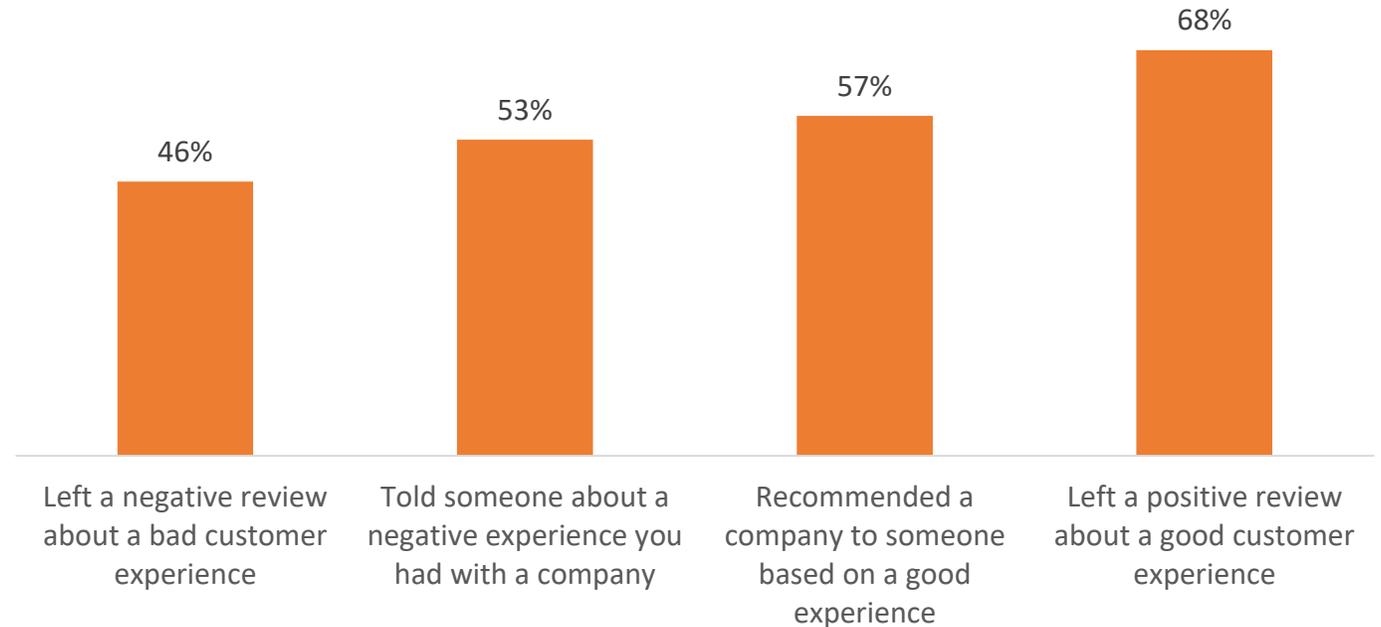
French Shoppers Value Loyalty Programs

Gen Z & Millennials like Loyalty Programs but also opt-out more from such programs than older generations.

Opinion on Loyalty Programs

Statement	%	Gen Z & Millennials
I enjoy loyalty programs that give me perks beyond just discounts e.g., free shipping	59%	Gen Z & Millennials: 65%
I enjoy loyalty programs	51%	
Loyalty programs make me like the company/brand more	51%	Gen Z & Millennials: 61%
I get significant value from loyalty programs	49%	
Loyalty programs make me feel part of an exclusive group of valued customers	46%	
Loyalty programs are one key reason I choose some specific retailers or brands	40%	Gen Z & Millennials: 51%
I sometimes opt out of loyalty programs because I receive too many emails	40%	Gen Z & Millennials: 46%
Often I forget that I signed up to loyalty programs	30%	Gen Z & Millennials: 37%

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The Shifting Rules of eCommerce

A majority of Shoppers of any age are now Omnichannel Shoppers

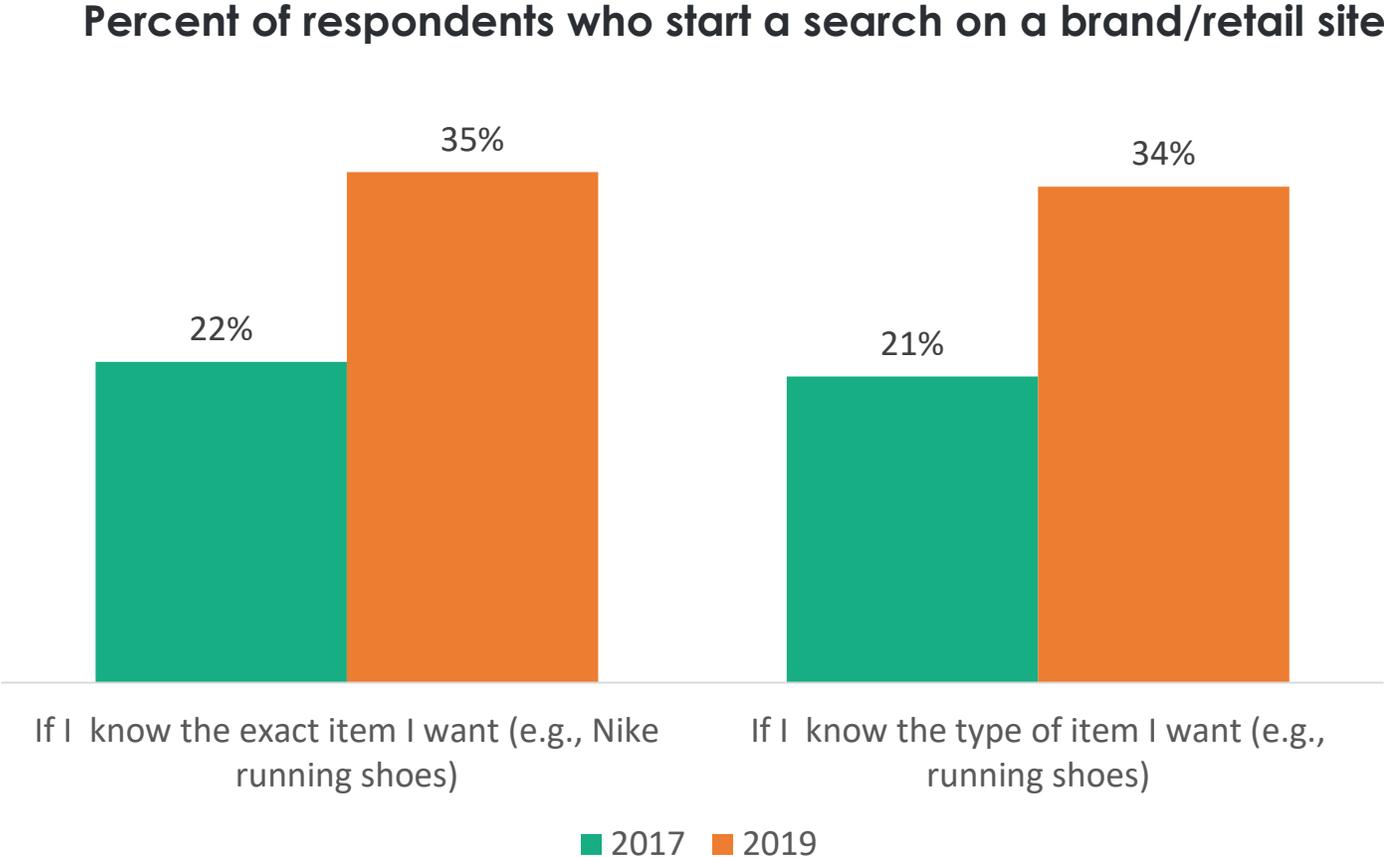Gen Z and Millennials exhibit the highest level of Omnichannel shopping behaviour.

	Gen Z & Millennials	Gen X	Boomers & Silent
Browse products online and then purchase them in a retail store	82%	82%	63%
Make purchases online after seeing the product at a retail store	77%	69%	54%
Order goods online and pick them up in/at a retail store	71%	64%	54%
Purchase on an app	61%	45%	26%

Share of respondents doing the following activities (regularly or occasionally)

Definition of age groups used: Gen Z: born after 1994 (under 25), Millennials: 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+)

Source: Criteo Shopper Story, France, July-August 2019, N=564

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In 2019, well informed shoppers now bypass Google and Amazon at much higher rates

Percent of respondents who start a search on a brand/retail site

Retail/brand websites have become the go-to destination for shoppers in their product search journey.

35%

22%

34%

21%

If I know the exact item I want (e.g., Nike running shoes)

If I know the type of item I want (e.g., running shoes)

■ 2017 ■ 2019

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Retail/Brand websites have a growing influence on purchasing decisions

How influential have Retail/Brand Websites become for your purchase decisions over the past two years?

Less Influential 35%

More or Equally Influential 65%
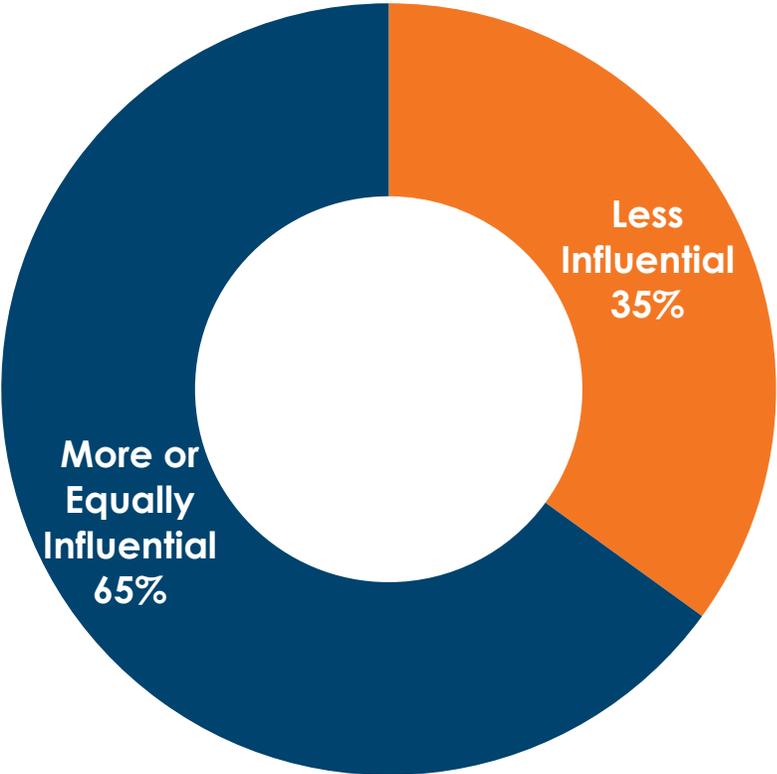
Nearly 2 out of 3 shoppers say retail and brand websites have become more influential or stayed equally influential for their purchase decisions over the last two years

Source: Criteo Shopper Story, France, July-August 2019, N=1007

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Shoppers are increasingly starting their search on a brand or retail website

Brand/Retail websites are now just as likely to be a shopper's first stop as Google or Amazon – even when the consumer hasn't settled on a specific item yet.

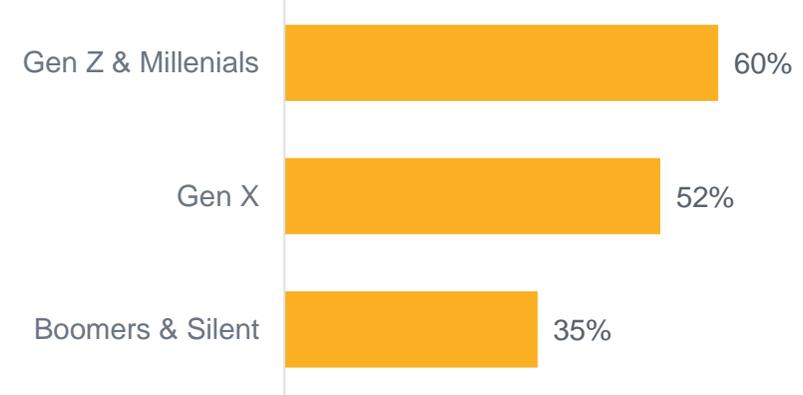When searching online to make a purchase, where do you typically start your search?

Bar chart data:

Category	If I know the exact item I want	If I know the type of item I want
A retail/brand website e.g., nike.com/fr	35%	30%
An Online Marketplace e.g., Amazon.fr	24%	21%
Search engine e.g., Google, Bing, etc.	19%	24%
Others	22%	25%

■ If I know the exact item I want (e.g., Nike running shoes)
■ If I know the type of item I want (e.g., running shoes)

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Apps continue to gain in importance, driven by massive adoption in Gen Z and Millennials
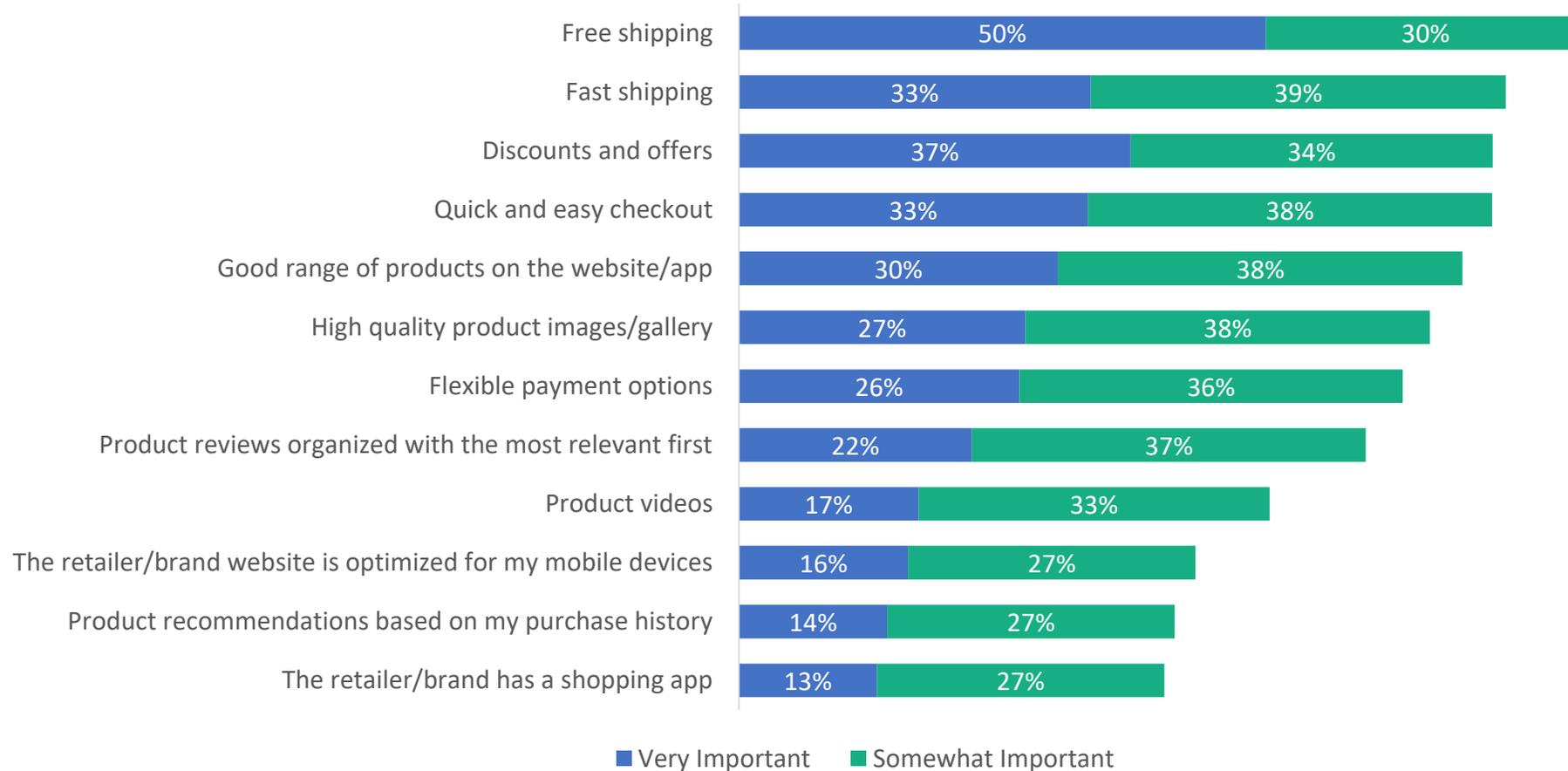
To look at products and get ideas

Gen Z & Millenials	60%
Gen X	58%
Boomers & Silent	45%

Check ratings and reviews

Gen Z & Millenials	60%
Gen X	52%
Boomers & Silent	35%

Purchase

Gen Z & Millenials	66%
Gen X	57%
Boomers & Silent	41%

Check my order status

Gen Z & Millenials	72%
Gen X	66%
Boomers & Silent	52%

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Source: Criteo Shopper Story, France, July-August 2019, N=1007

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Shoppers now demand much more beyond free shipping and discounts

How important are the following factors in helping you decide whether to make an online purchase with a retailer/brand?
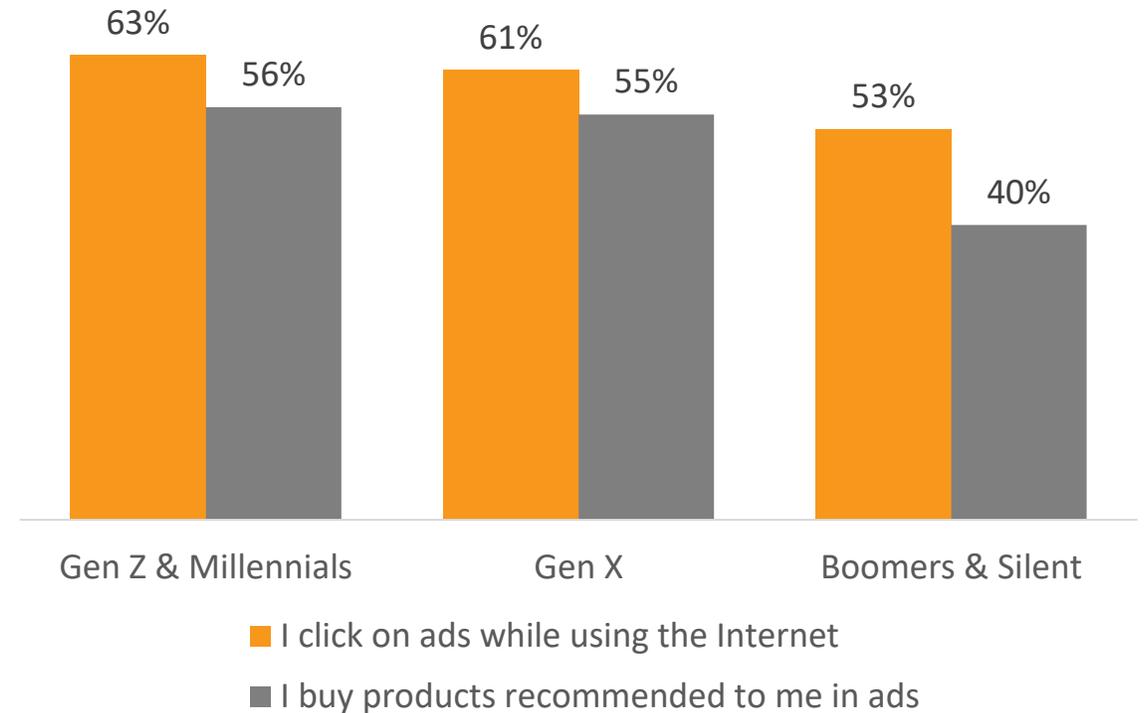
Factor	Very Important	Somewhat Important
Free shipping	50%	30%
Fast shipping	33%	39%
Discounts and offers	37%	34%
Quick and easy checkout	33%	38%
Good range of products on the website/app	30%	38%
High quality product images/gallery	27%	38%
Flexible payment options	26%	36%
Product reviews organized with the most relevant first	22%	37%
Product videos	17%	33%
The retailer/brand website is optimized for my mobile devices	16%	27%
Product recommendations based on my purchase history	14%	27%
The retailer/brand has a shopping app	13%	27%

■ Very Important ■ Somewhat Important

Source: Criteo Shopper Story, France, July-August 2019, N=1007

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How different Generations feel about Online Ads

All age groups discover new products through advertising

Shoppers across all age groups confirmed sponsored ads helped them discover new brands and products. This is true for 2 out of 3 Gen Z's and Millennials.

I discover new brands and products through sponsored ads
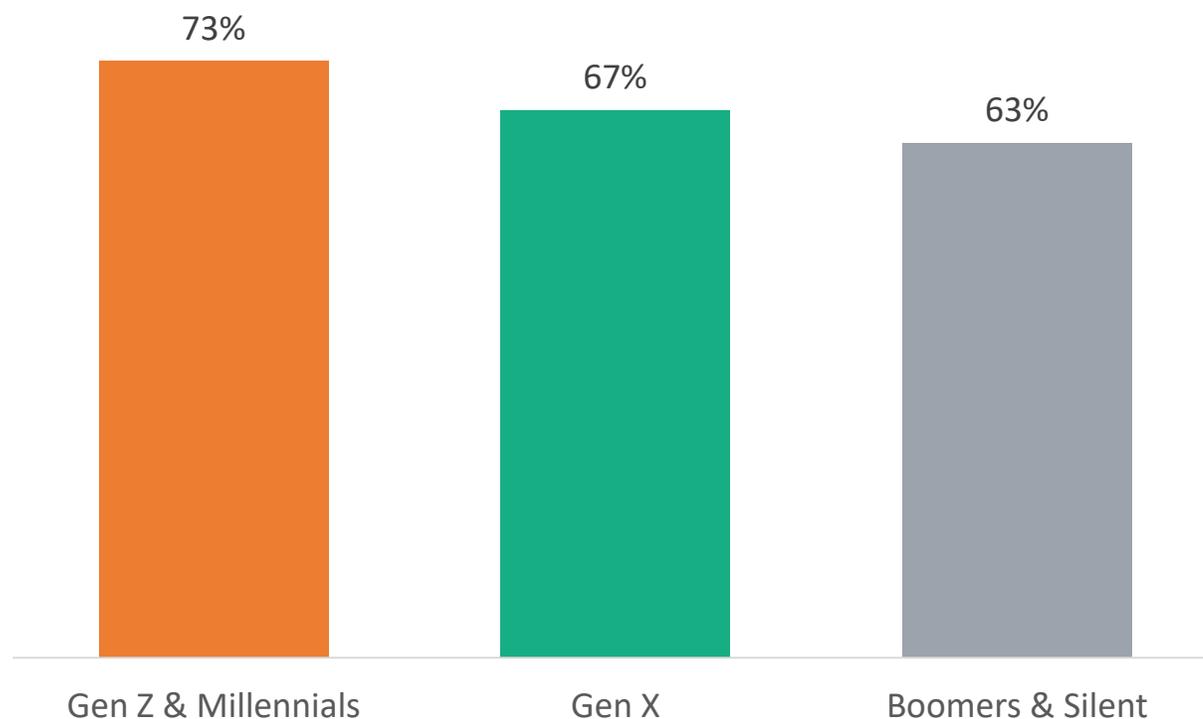
Gen Z & Millennials	Gen X	Boomers & Silent
73%	67%	63%

Definition of age groups used: Gen Z: born after 1994 (under 25), Millennials: 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+)

Source: Criteo Shopper Story, France, July-August 2019, N=1007

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All generations like products they see in online Ads

A majority of shoppers across all age groups said they liked the products they see in online ads. Younger generation shoppers feel more so than the older age-groups.
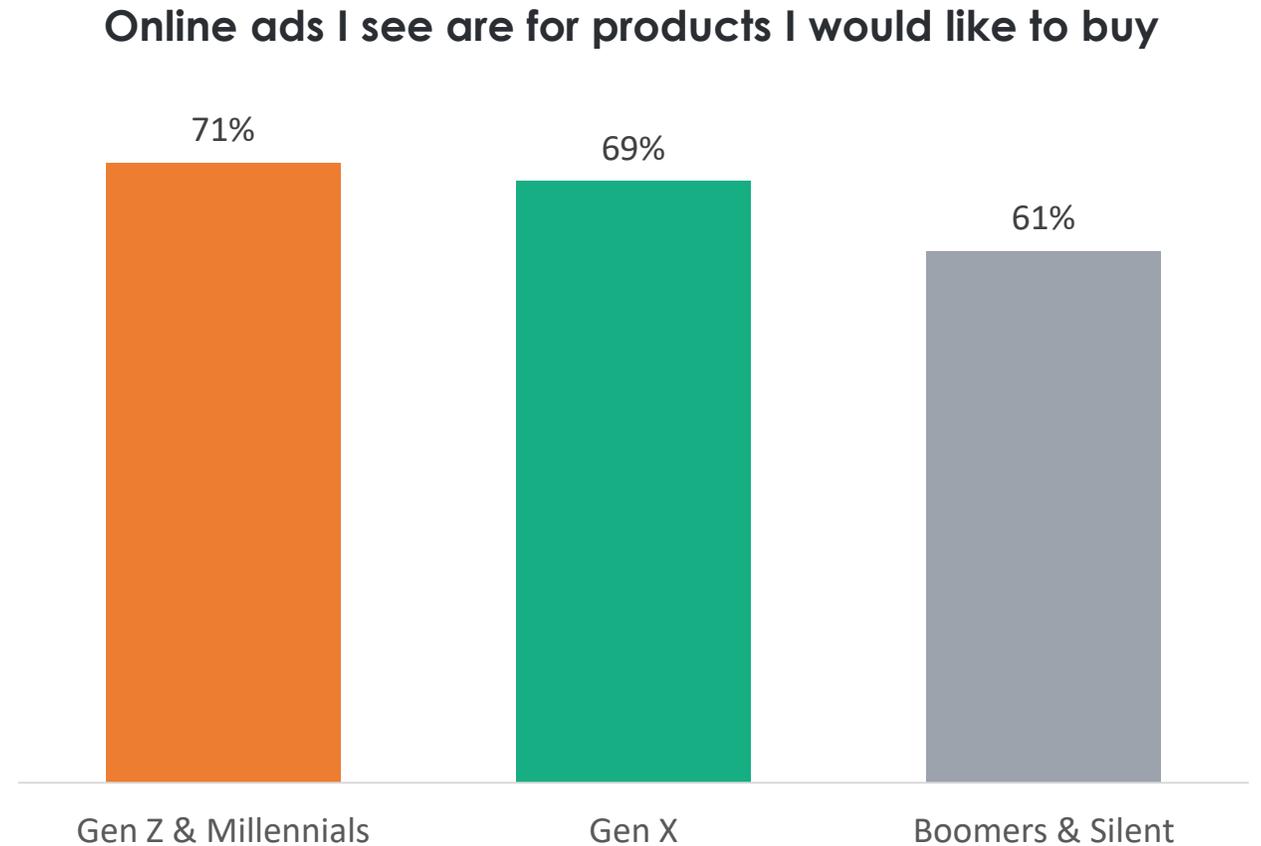
Online ads I see are for products I would like to buy

71% — Gen Z & Millennials
69% — Gen X
61% — Boomers & Silent

Definition of age groups used: Gen Z: born after 1994 (under 25), Millennials: 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+)

Source: Criteo Shopper Story, France, July-August 2019, N=1007

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Gen Z/Millennials are the most likely to click online ads and buy those products

3 out of 5 Gen Z's and Millennials confirmed they click on ads while using the Internet.

Gen Z's and Millennials are also more likely to buy the products they see in online ads.

Gen Z & Millennials: 63% / 56%
Gen X: 61% / 55%
Boomers & Silent: 53% / 40%

■ I click on ads while using the Internet
■ I buy products recommended to me in ads

Definition of age groups used: Gen Z: born after 1994 (under 25), Millennials: 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+)

Source: Criteo Shopper Story, France, July-August 2019, N=1007

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How to make more Shoppers Buy from You

Takeaways to win over today's shopper

1

Unify the online and offline shopping experience

Shoppers value different aspects of online and in-store shopping. Make sure the entire experience is seamless across channels.

2

Make your website your most informed sales associate !

Shoppers are increasingly turning to retail/brand websites for product discovery and research. Make sure they get value for the time they spend on your site.

.

3

Make your website search experience a priority

Win more shoppers when they search on your site and are in buying mode. Let them buy from search results in a few clicks.

Takeaways to win over today's shopper

4

Help Your Customers Score a Deal

When shoppers visit your site, display the most relevant deals and discounts based on their interests and previous browsing behaviour.

5

Invest in an App to connect better with the younger generations

Your app will help you keep shoppers better engaged, particularly Gen Z and Millennials.

6

Advertising relevance drives sales

Shoppers want Ad relevance and timeliness, and marketers who respect that will see more conversions.

Thank You

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What's Next?
Building Full-Funnel Web Campaigns

What is Full-Funnel Advertising?

Awareness
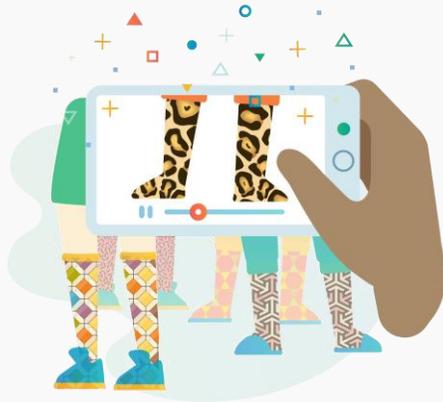
Make your brand
more visible.

Consideration

Drive high-value
prospects to
your website.

Conversion

Encourage interested
shoppers to buy

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Get Noticed

Awareness
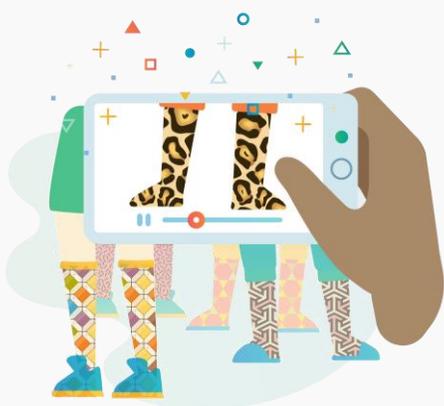
Make your brand
more visible.

- With **2 billion active monthly shoppers** passing through the Criteo network, we build profiles of the ideal shopper for your business.

- The top **1% of matches** (totally new users) are sent display ads to build awareness and drive traffic to your site.

- Our **direct access to 4200+ premium publishers** means Criteo ads get placed before others on top-tier publisher and media sites.

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Get Traffic

Consideration

Drive high-value prospects to your website.

- The Criteo AI Engine analyzes data from **over 1 billion transactions** every single month. We show ads to high-value prospects based on browsing and buying behaviour.

- **Smart product recommendations** mean your ads will automatically feature the products most likely to trigger visits and engagement.

- **Flexible targeting** allows you to build audiences from Criteo's commerce data set or from your own prospect and customer lists.

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Get Sales

Conversion

Encourage interested shoppers to buy.

- With **2B+ cross-device IDs** matched across **120+ buyer intent signals** on **35B+ daily shopping events**, we show hyper-relevant ads with the highest likelihood to convert.

- Criteo retargeting ads deliver a **13x Return on Ad Spend** by showing special deals and offers wherever shoppers go next.

- Criteo can close the loop between **your physical store and your website** by showing ads to your offline customers based on offline shopping behaviour.
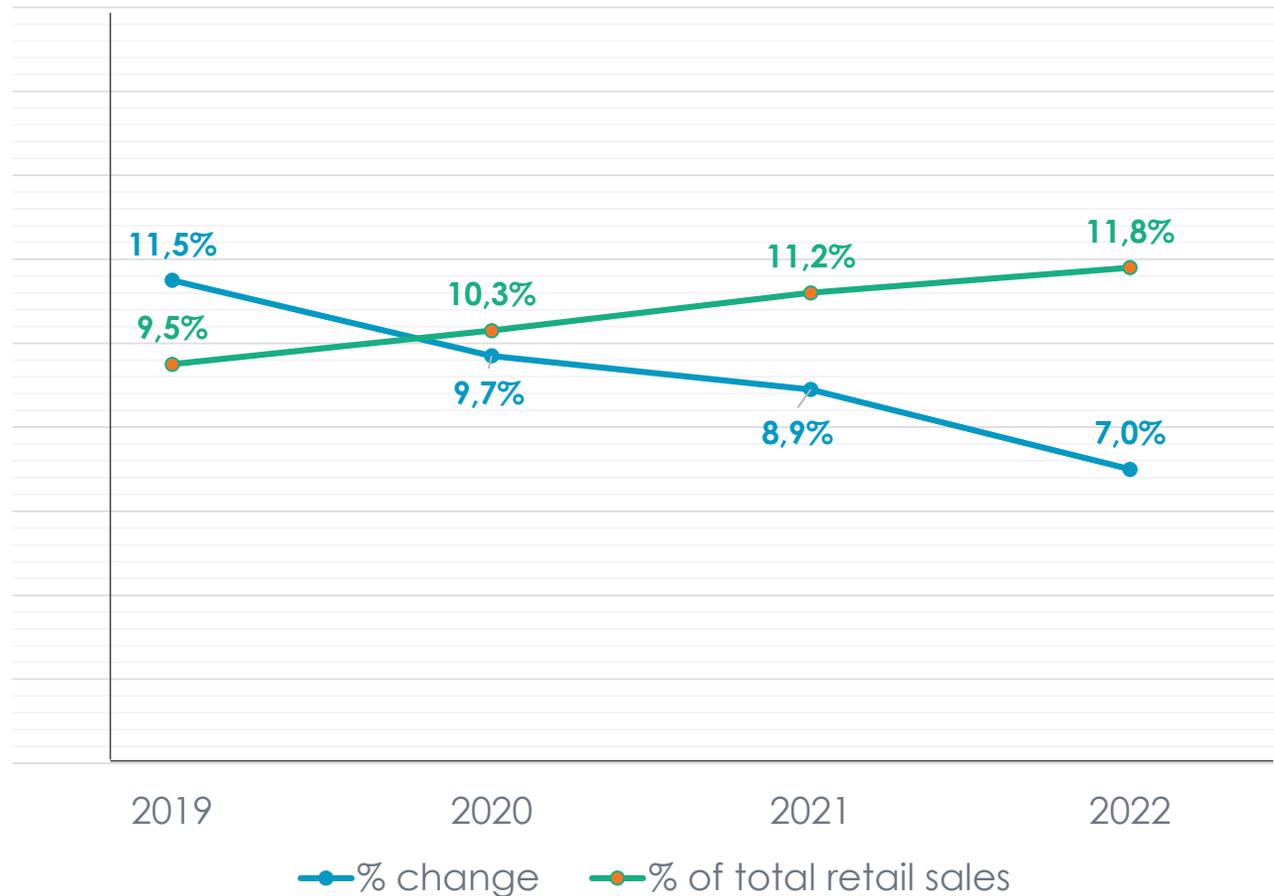
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Appendix

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Share of Online Sales will Continue to Rise

eCommerce Sales, % Change vs. % of Total Sales, France

11,5%

9,5%

10,3%

11,2%

11,8%

9,7%

8,9%

7,0%

2019 2020 2021 2022

━●━ % change ━●━ % of total retail sales

- Online sales continue to gain a greater share of total retail sales. In France, over 10% of total retail sales are expected to come from eCommerce in 2020.

- Fast/free shipping and click-and-collect options are encouraging shoppers to buy online the products they used to buy in stores.

Source: eMarketer, May 2019

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€65 billion

Retail eCommerce sales in France in 2020

Source: eMarketer, May 2019

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Omnishopping takes many forms

It's all about enabling the shoppers to buy and get the product whenever, wherever they want.

Showrooming

See in a store, buy from that retailer's site

Webrooming

Research online, buy in store

Click & Collect

Buy online, pick up at a store or kiosk

Scan & Scram

See in store buy it from another retailer online

Click & Ship

See in a store but buy on your phone for convenience

Who are Omnishoppers?
Shoppers who use a variety of devices, channels, and platforms to browse and buy products.

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