

2022 Black Friday E-commerce Results

In the Current Economic Climate

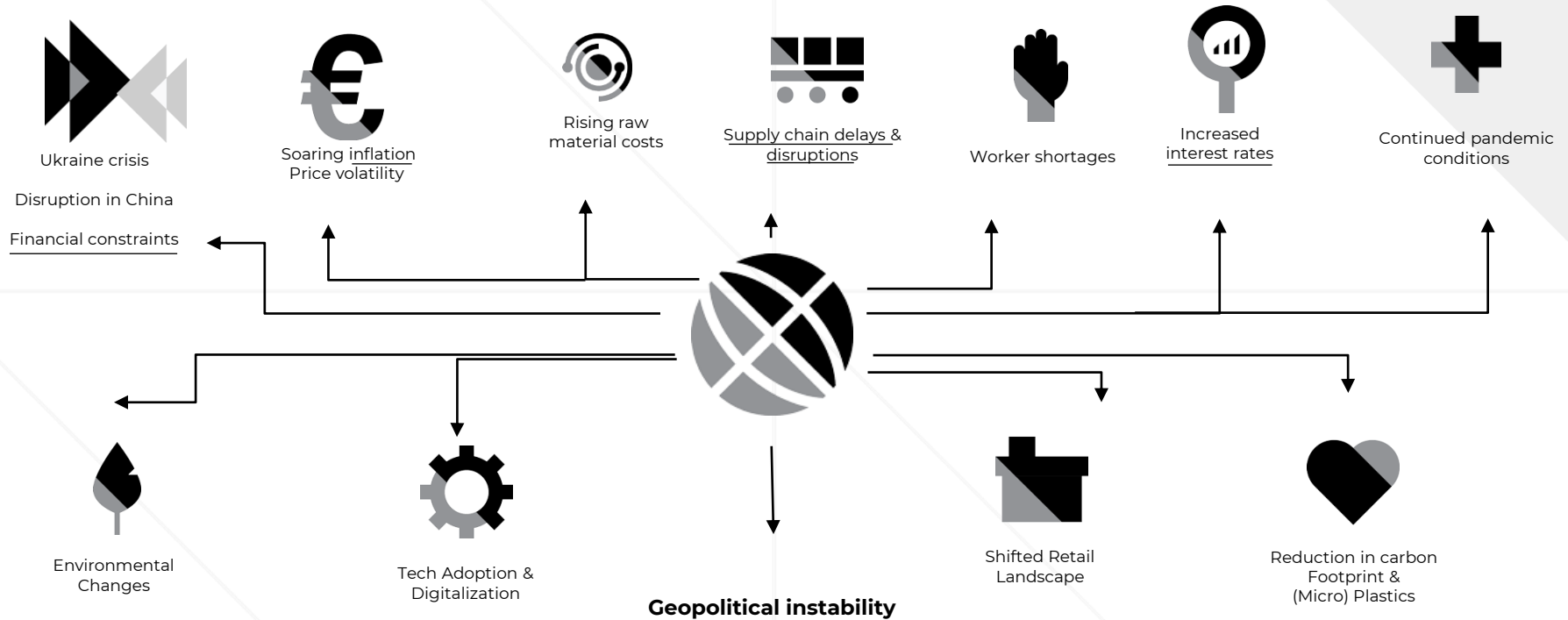
December 6, 2022

3pm CET | 2pm GMT

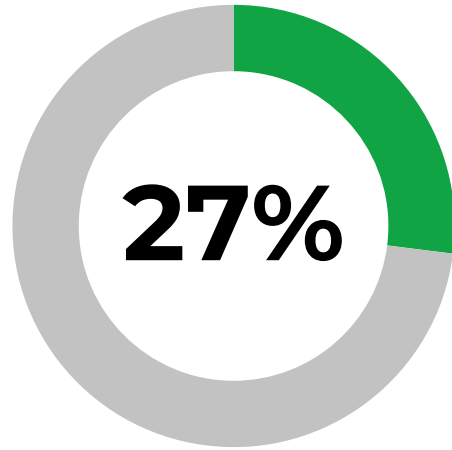
Roberto van Taunay, Commercial Leader E-Commerce Western Europe Zone
Guillaume Coudry, Chief Customer Officer Foxintelligence



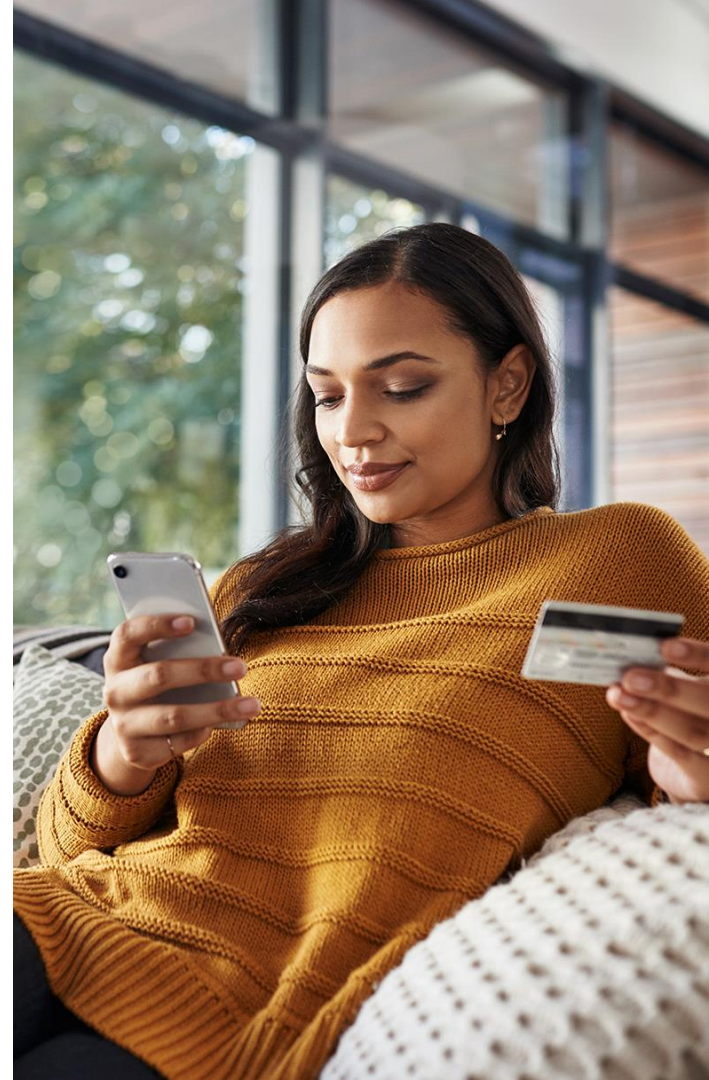
The macro economic environment is faced with unprecedented change



Everything is pointing to e-commerce continued acceleration



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



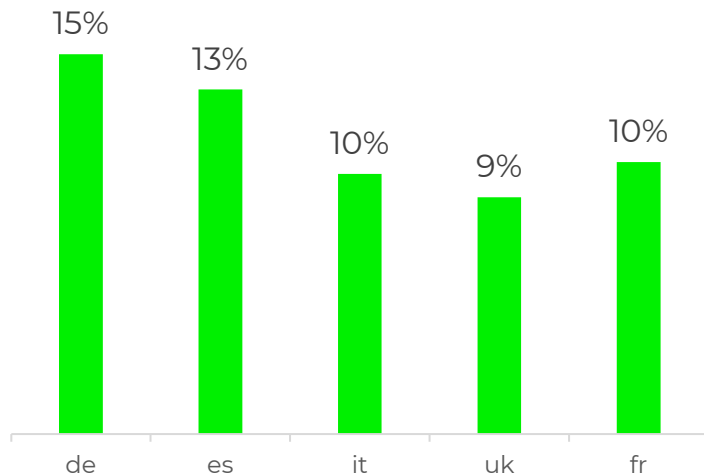
Did online shoppers in the top 5 European markets rally for Black Friday this year?

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



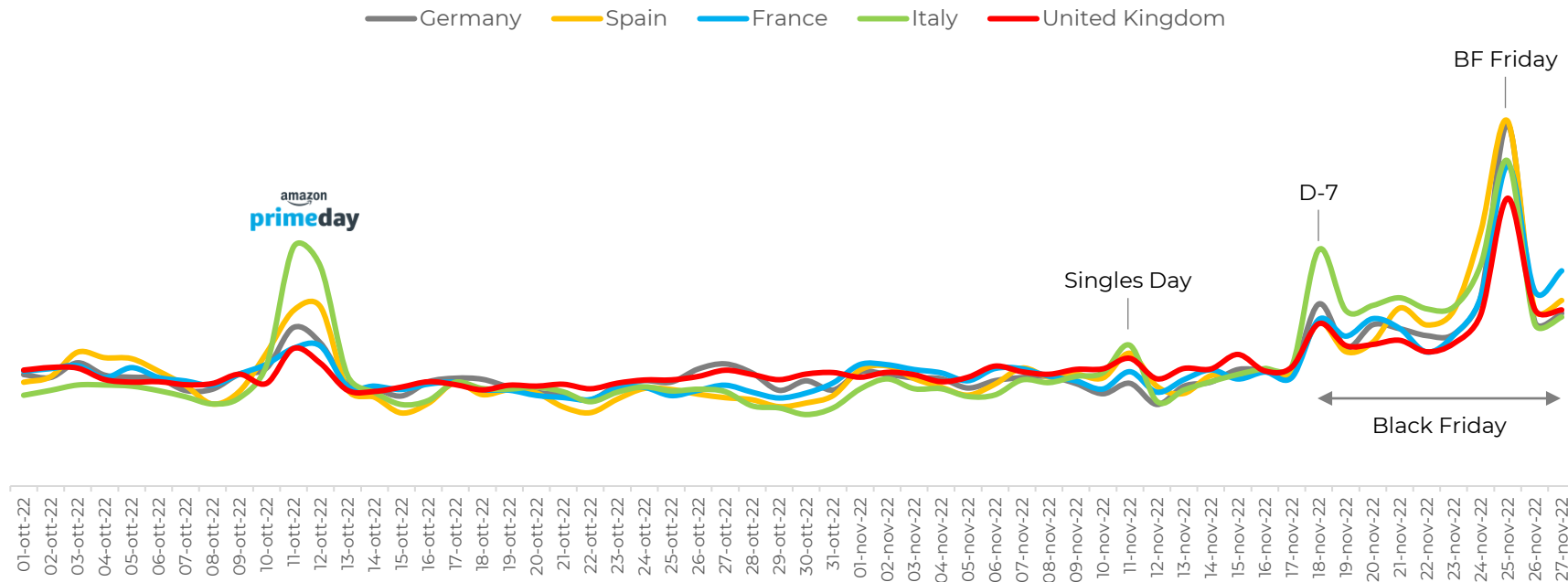
Top 7 e-commerce days over the last 52 weeks

In value, between 29/11/21 (Cyber Monday 2021) and 27/11/22 (Sunday)

				
Fri. Nov. 25	Fri. Nov. 25	Tue. Jul. 12 	Fri. Nov. 25	Fri. Nov. 25
Thu. Nov. 24	Tue. Jul. 12 	Fri. Nov. 25	Tue. Jul. 12 	Sun. Nov. 27
Fri. Nov. 18	Thu. Nov. 24	Wed. Jul. 13 	Sun. Nov. 27	Sat. Nov. 26
Tue. Jul. 12 	Wed. Jul. 13 	Tue. Oct. 11 	Sat. Nov. 26	Mon. Nov. 29 
Sun. Nov. 27	Sun. Nov. 27	Fri. Nov. 18	Wed. Jul. 13 	Fri. Sep. 9 
Sat. Nov. 26	Mon. Nov. 29 	Thu. Nov. 24	Thu. Nov. 24	Thu. Nov. 24
Wed. Jul. 13 	Fri. Sep. 9 	Wed. Oct. 12 	Fri. Nov. 18	Sun. Nov. 20

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

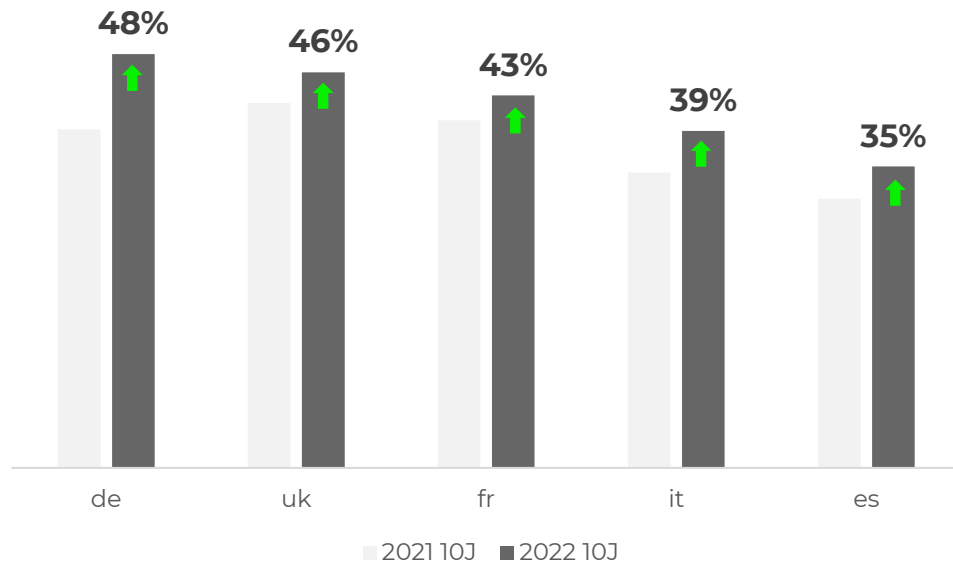


This year Black Friday attracted more online shoppers than in 2021

Germany has the highest penetration & average online spend

Black Friday (10-day period) online participation rate in EU5

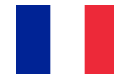
100% = Active online shoppers over the last 52 weeks



Average online spend per shopper during Black Friday

	197€
	182€
	164€
	164€
	123€

Black Friday participation is particularly marked among Millennials, while it is much lower among Generation Z



Participation rate

Average online shopper spend

Generation B [-1959]



36%



157 €

Generation X [1960-1979]



46%



205 €

Generation Y [1980-1994]



49%



206 €

Generation Z [1995-]



37%

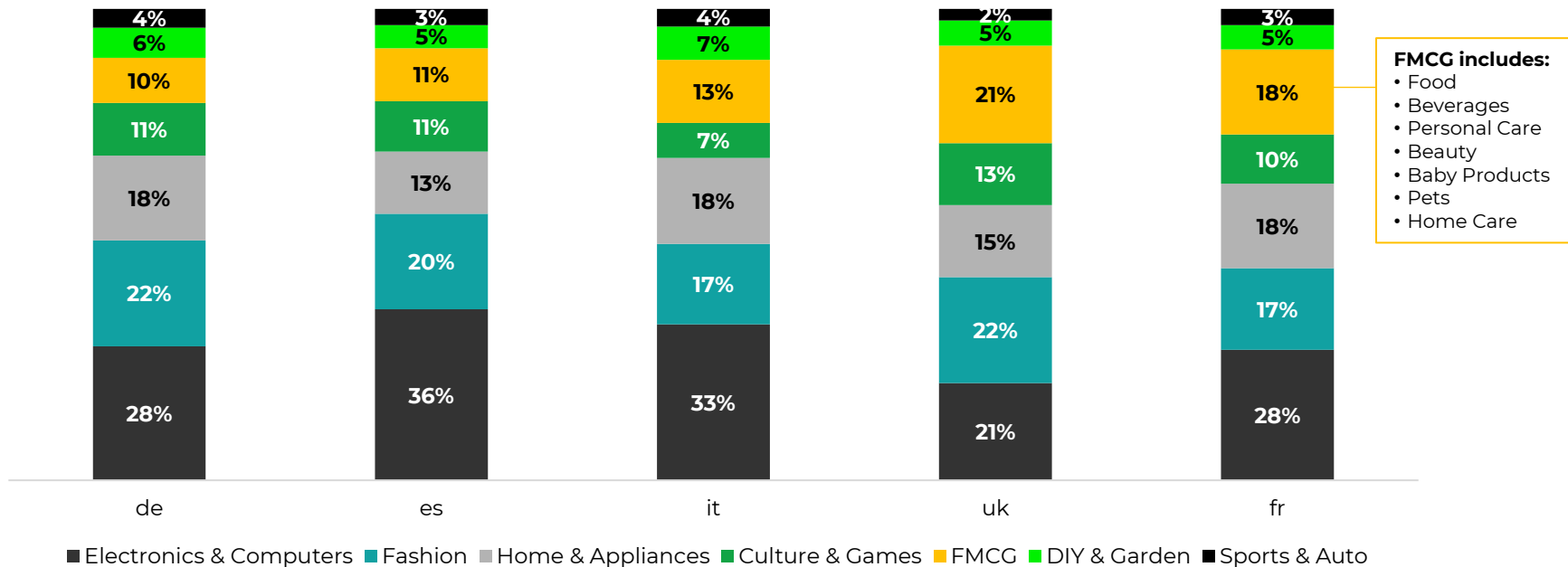


147 €

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



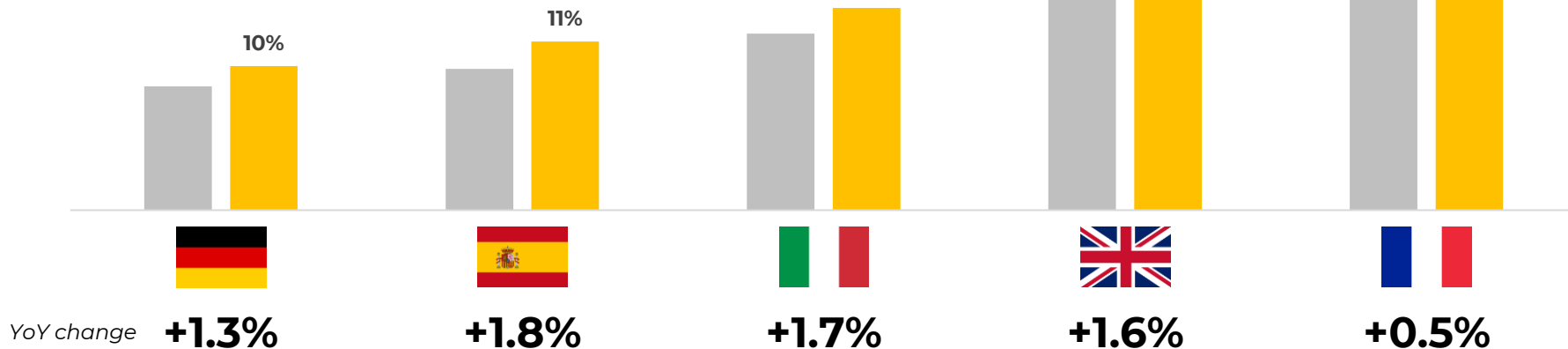
FMCG increased its share in the 2022 online Black Friday edition in all top 5 European markets

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

FMCG includes:

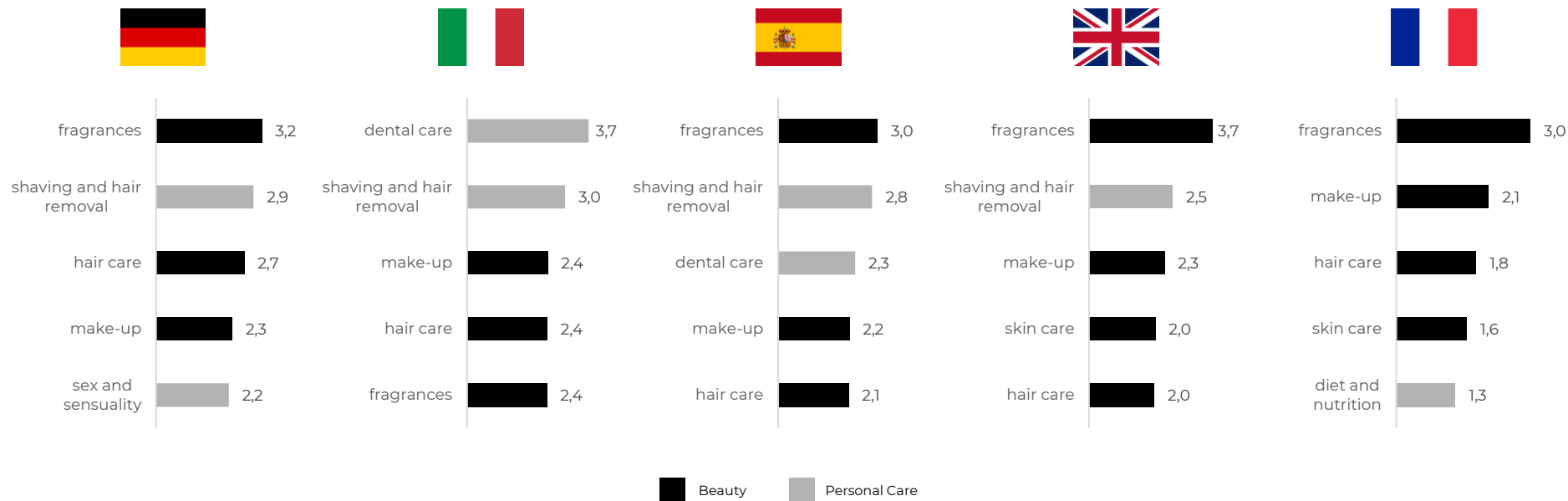
- Food
- Beverages
- Personal Care
- Beauty
- Baby Products
- Pets
- Home Care

■ 2021 ■ 2022



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



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





NielsenIQ

Find out more on how we can support your business with the most complete and accurate view of e-commerce.

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Thank you.