

European Shopper Survey

The « Why » on main Shopper issues at a regional level

ITALY



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07 September 2017

Objective and methodology

- The objective of this cross-country research is to provide high level information/insight across Europe, and over time, support leadership through storytelling on grocery shopping (*)
- The survey is focused on 3 main areas of investigation:
 - Is grocery shopping turning into a multichannel path?
 - Is digital experience changing the way for grocery shopping?
 - How is food wellness in Europe?
- A quantitative online survey has been undertaken in 7 European countries on a sample of 2.600 shoppers, of which 401 in Italy



(*) Packaged food, fresh food, beverages, frozen food, personal&beauty care, laundry&household products, pet care

Business answers of each investigated area

IS GROCERY SHOPPING TURNING INTO A MULTICHANNEL PATH?

- How are shoppers diversifying their grocery purchases among channels?
- What are the emerging channels?
- What drives a shopper to a specific channel?
- What are the opportunities/gaps for each channel?
- Are general grocery stores (hypermarkets, supermarkets, discounts) losing their attractiveness in favor of specialist channels?

IS DIGITAL EXPERIENCE CHANGING THE WAY FOR GROCERY SHOPPING?

- Have digital revolution solutions changed our way of grocery shopping?
- Have digital solutions changed how shoppers
 - Search for product information and usage?
 - Prepare their list of products?
 - Compare prices and promotions?
 - Decide which store to visit?
- What is grocery shopping online penetration across countries? Which kind of products are currently bought the most?

HOW IS FOOD WELLNESS IN EUROPE?

- Is wellness food increasing its relevance in families food baskets?
- What are the main reasons to buy wellness food ?
- Are hyper and super able to face the competition with Bio stores and online sites?

Agenda



1



Is Grocery shopping turning into a multichannel path?

2



Is Digital Experience changing the way for Grocery shopping ?

3



How is Food Wellness in Europe?



Agenda



1



Is Grocery shopping turning into a multichannel path?

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Is Digital Experience changing the way for Grocery shopping ?

3

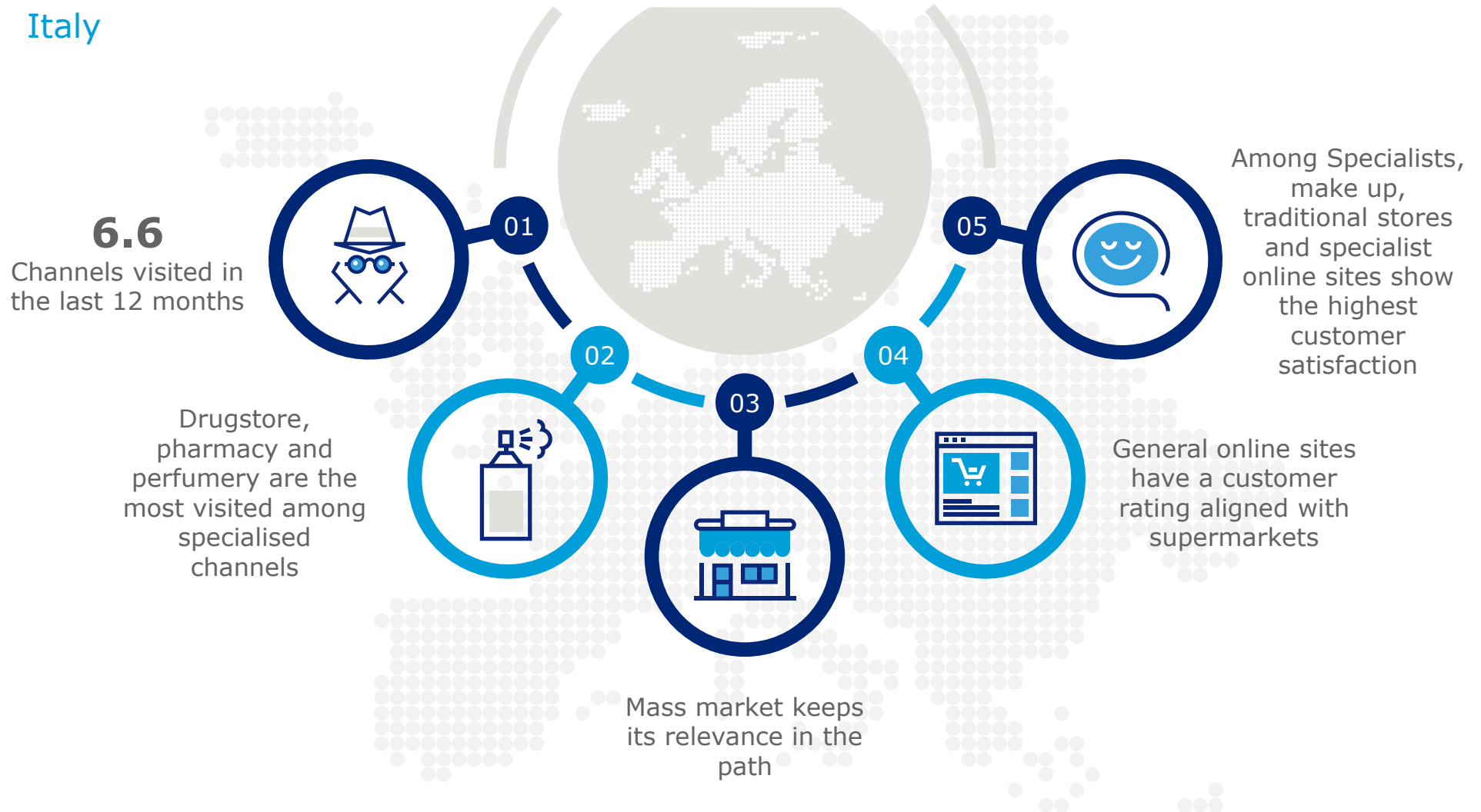


How is Food Wellness in Europe?



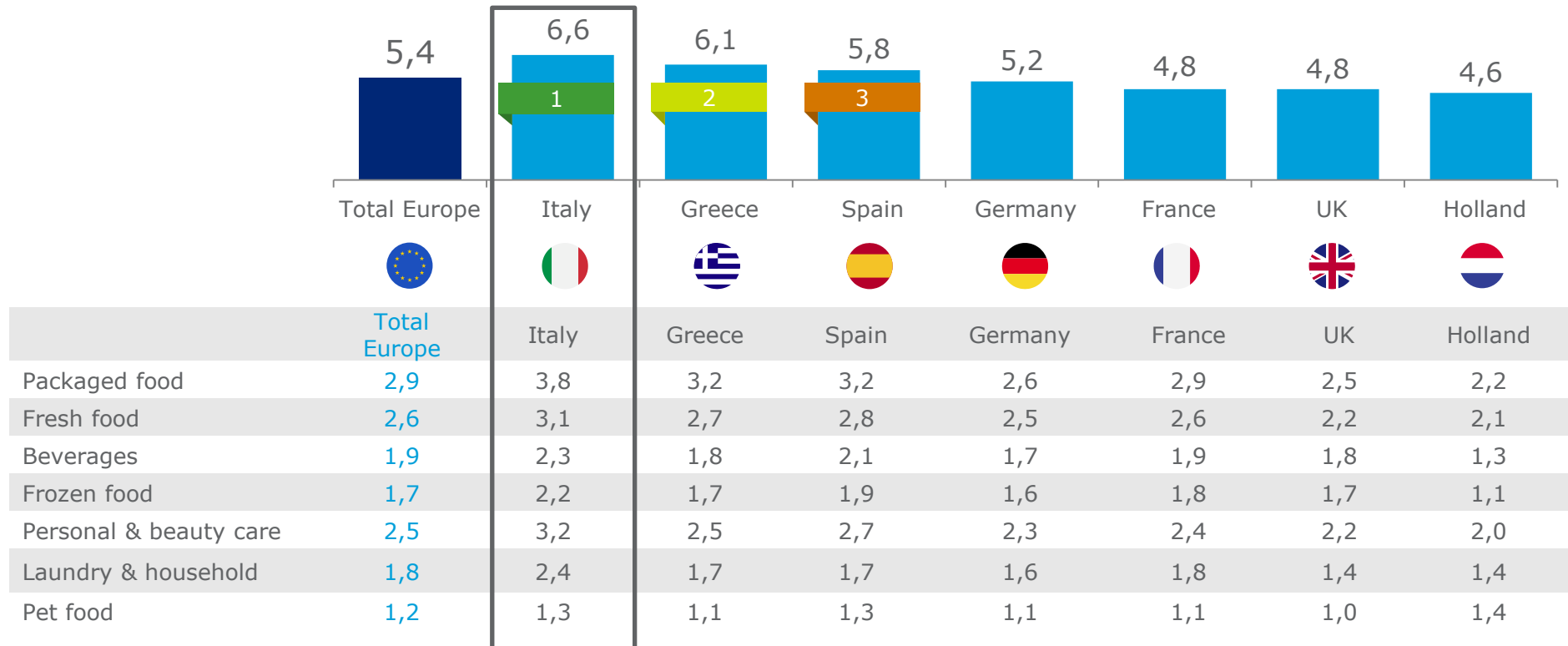
Grocery shopping is turning into a multichannel in favour of specialist stores

Italy



Italian shoppers visit stores for grocery shopping more than the average of Total Europe

Average number of channels visited in a year



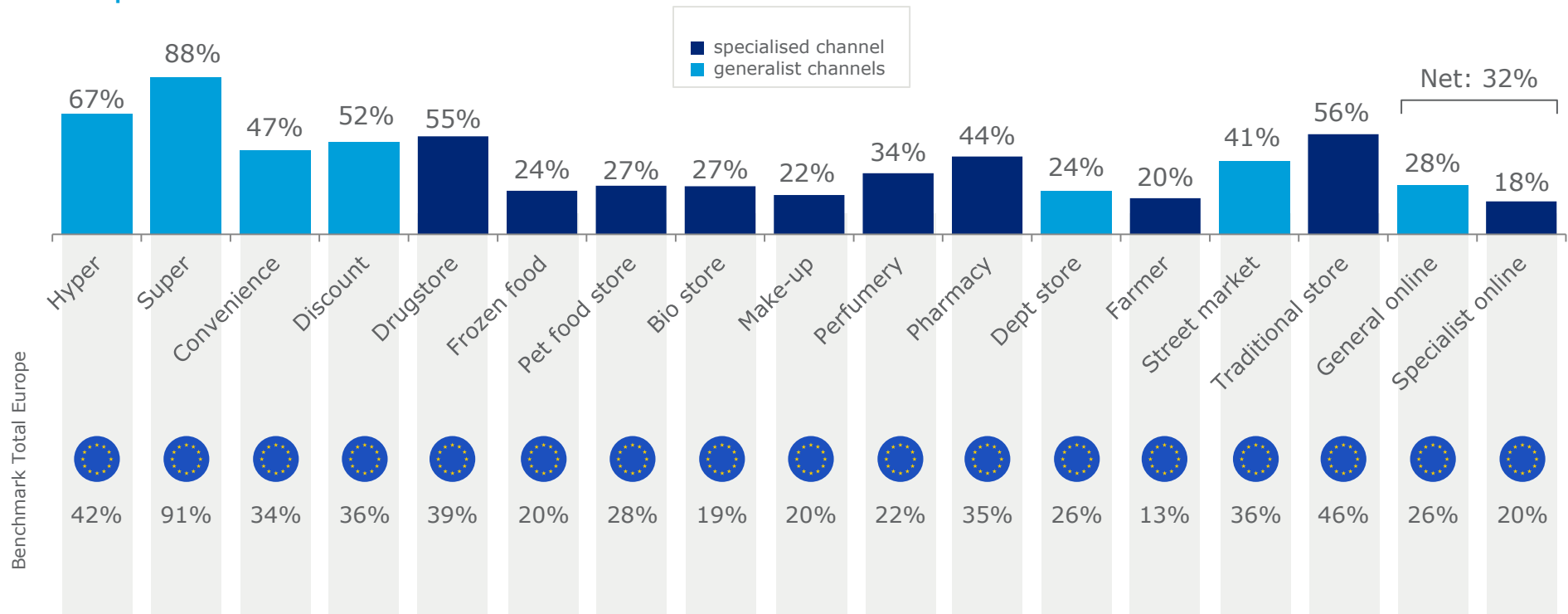
- Personal & beauty care shoppers highly diversify their purchases compared to the weight of the category on grocery

1. During the last 12 months, which types of stores do you visit to buy these grocery products for home consumption/usage?

Source: IRI European Shopper Survey - 2017

Hypermarket, supermarket and traditional store are the most visited channels in Italy for grocery shopping in a year

% of shoppers who visit the channels in a year for grocery purchase – Italy and Total Europe bench

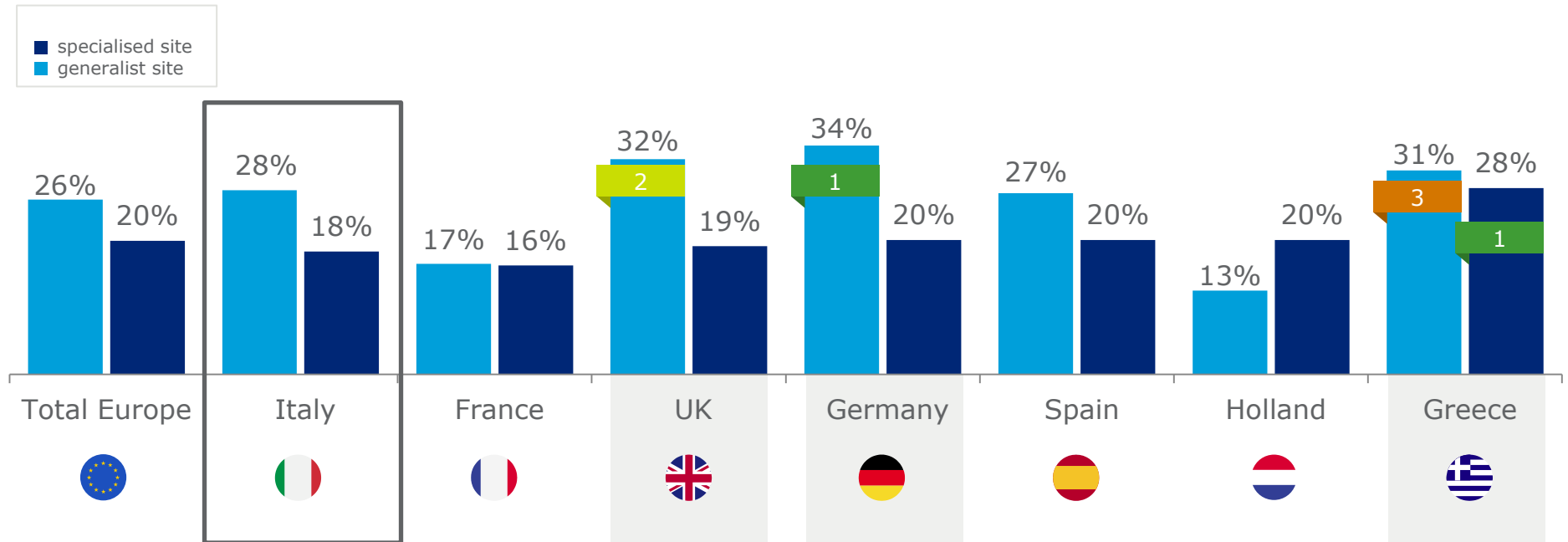


1. During the last 12 months, which type of stores do you visit to buy these grocery products for home consumption/usage?

Source: IRI European Shopper Survey - 2017

Italian shoppers visit general online sites as the rest of Europe

% of shoppers who visit online sites for grocery shopping

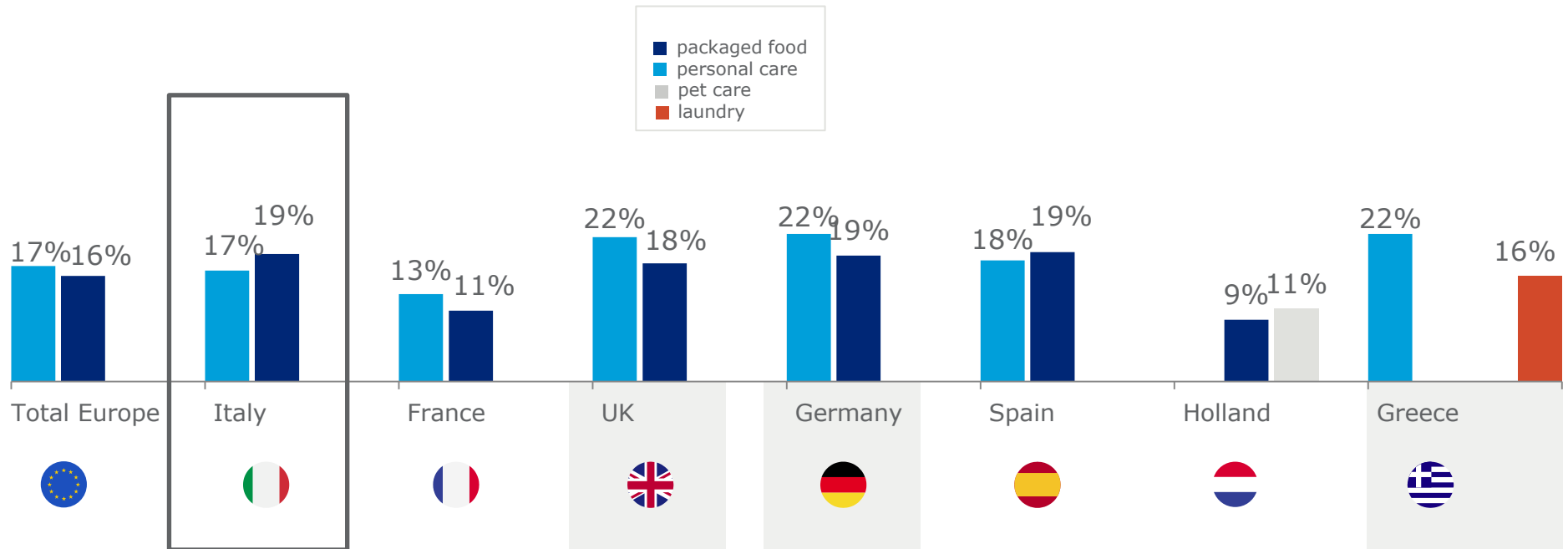


1. During the last 12 months, which types of Online stores do you visit to buy these grocery products for home consumption/usage?

Source: IRI European Shopper Survey - 2017

Packaged food and personal care are the top two most growing categories in Italy

Top two growing categories bought online

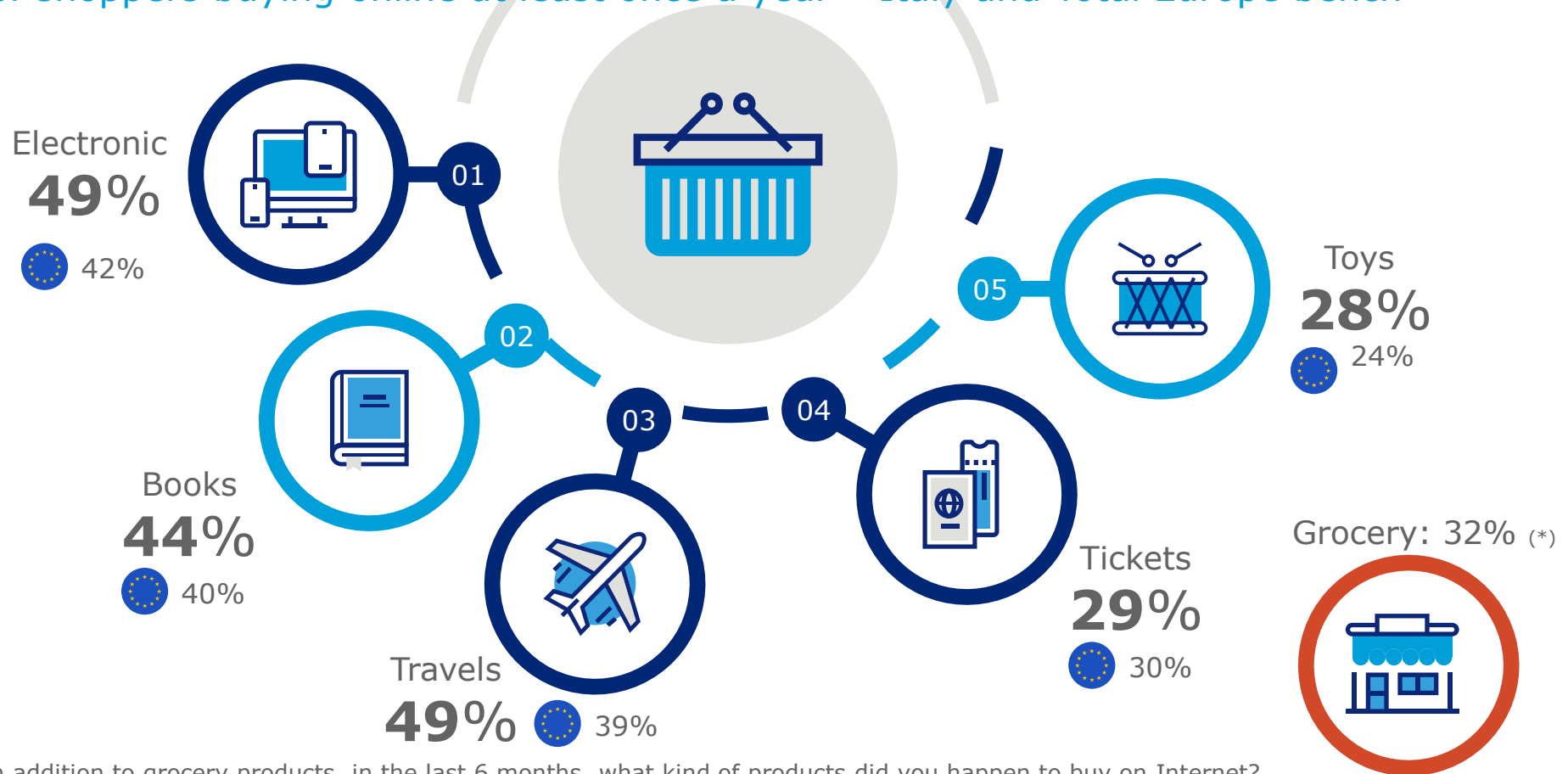


1. Which types of products have been bought Online for home consumption/usage in last 12 months

Source: IRI European Shopper Survey - 2017

Online visiting for grocery has a good level of penetration among European shoppers, so the potential growth should focus on average spending and frequency of purchase

% of shoppers buying online at least once a year – Italy and Total Europe bench



10. In addition to grocery products, in the last 6 months, what kind of products did you happen to buy on Internet?

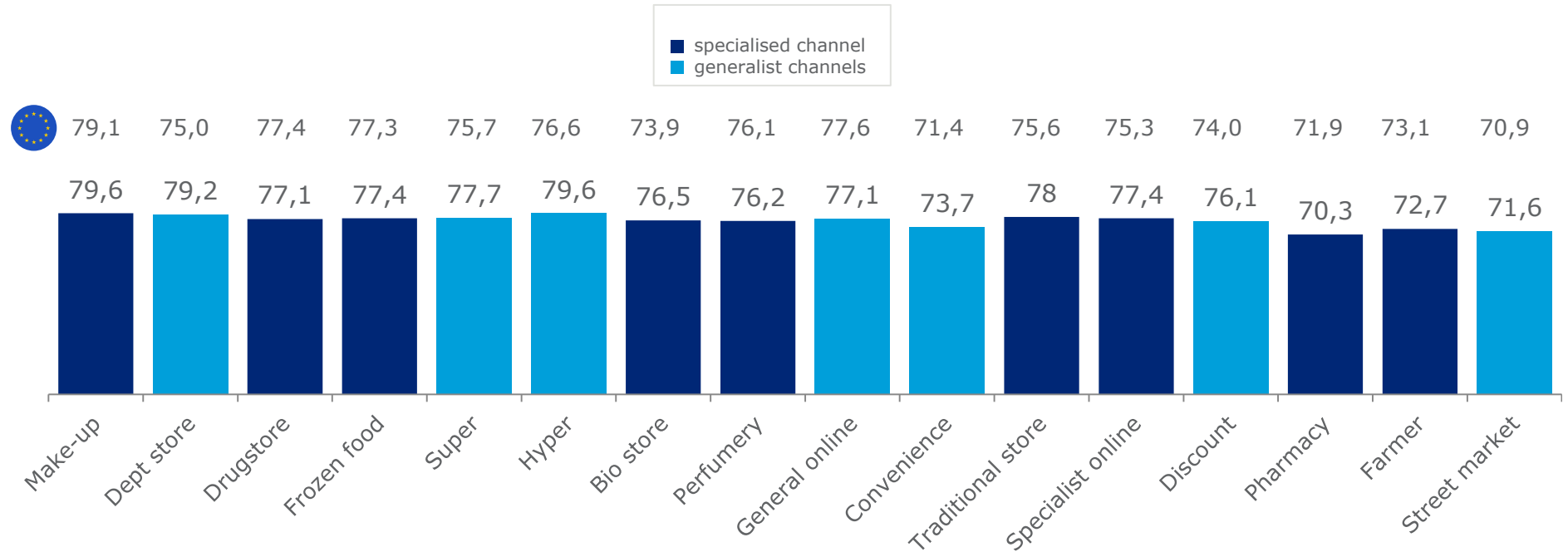
(*) Except for grocery shopping which is «shoppers who visit»

8% among current non Internet Italian buyers declare they definitely will buy on the Internet in next 6 months

Source: IRI European Shopper Survey - 2017

Make-up stores and Dept. stores obtain the best evaluation (good) and general online sites perform as Super

Customer Satisfaction Index – Italy and Total Europe bench



CUSTOMER SATISFACTION INDEX

Shoppers have been asked to evaluate each channel on a list of features (product range, quality, price/promo, convenience, innovation, shopping experience, location, time to shop, specificity of products) and to attribute a relevance to each feature. The product of evaluationXrelevance is the Customer Satisfaction Index

Source: IRI European Shopper Survey - 2017

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Is digital experience changing the way for Grocery shopping ?

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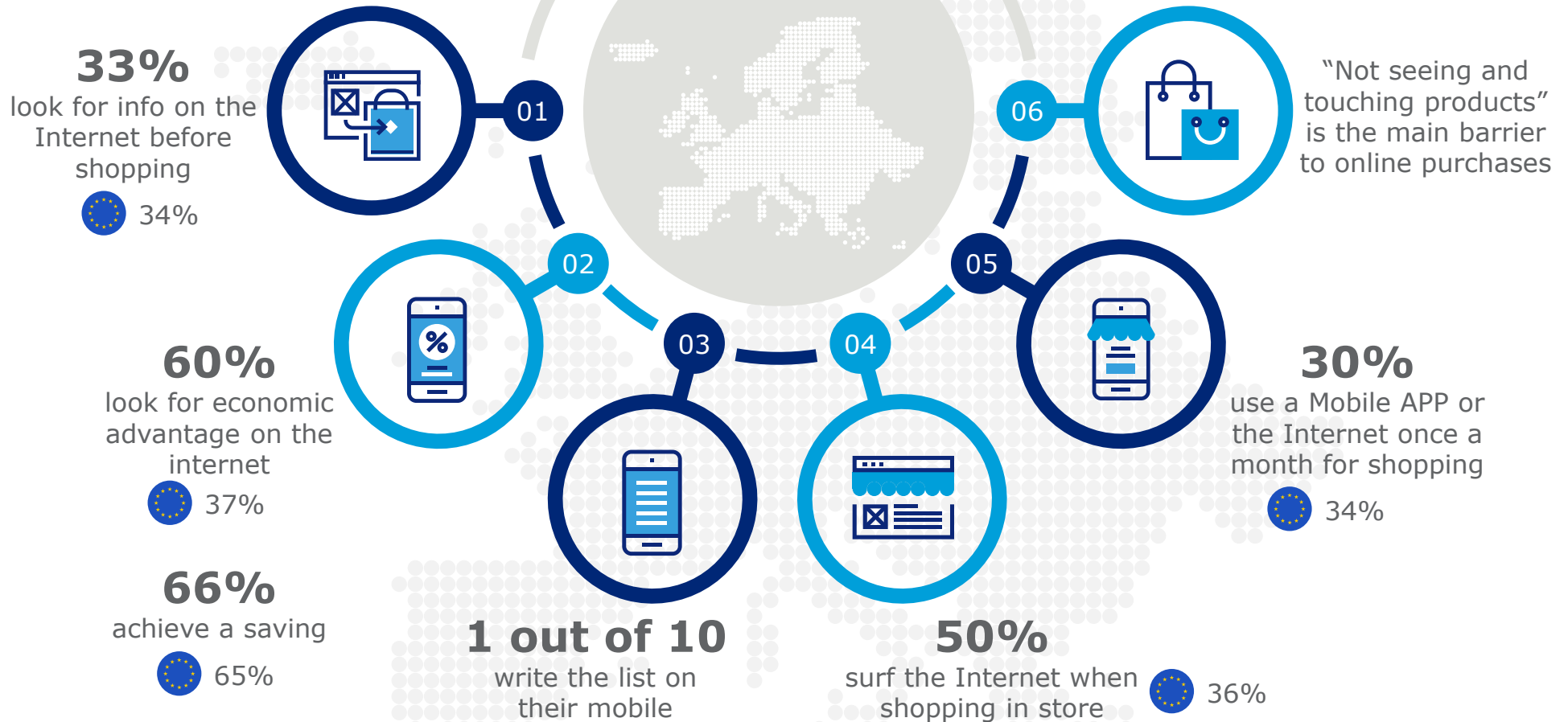


How is Food Wellness in Europe?



The Internet is widely changing shopping behaviour also in Italy

Italy and Total Europe bench



Seeking information

Shopping Preparation

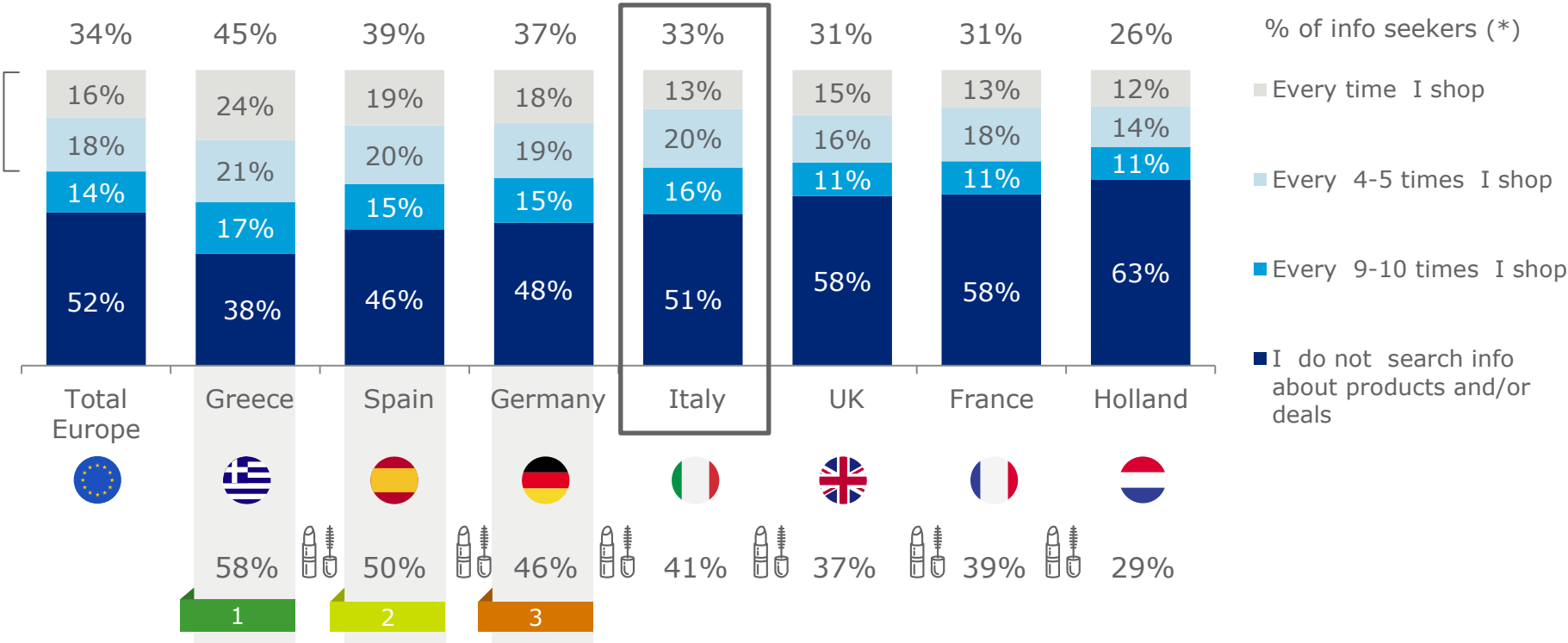
Shopping List

In the Store

Online Shopping

33% of Italian shoppers regularly use the Internet to seek information before shopping

% of Info Seekers



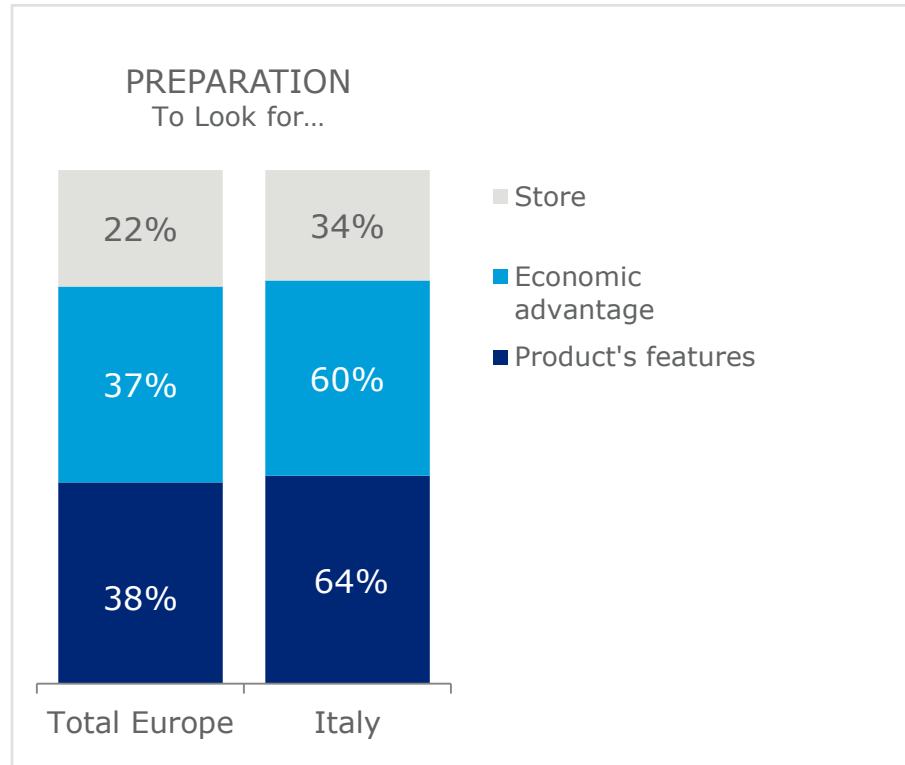
9. Indicate how frequently you use the Internet to search for information about products/prices
 (*) The value refers to the sum of "Every time I shop" + "Every 4-5 times I shop"

Source: IRI European Shopper Survey - 2017

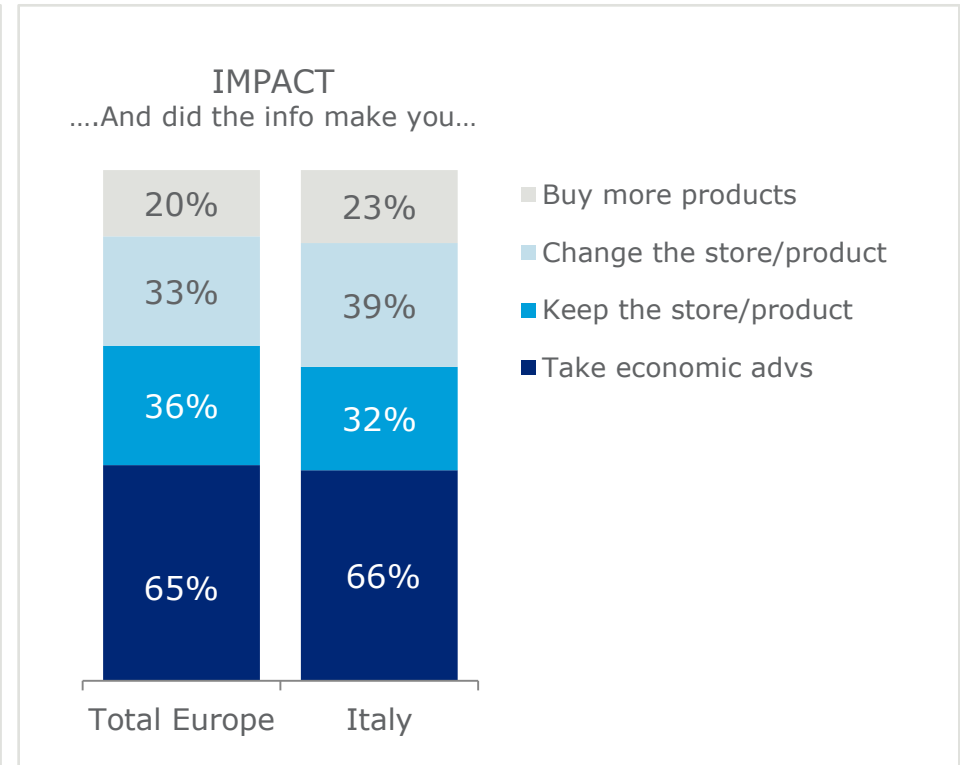
Italian Info Seekers look for product features and economic advantages when preparing grocery shopping, 66% obtain a saving through coupons and promotions

Seeking information
Shopping Preparation
Shopping List
In the Store
Online Shopping

Italy and Total Europe bench



13. In the last 6 months, did you use any mobile app or website to prepare your purchase of grocery products?

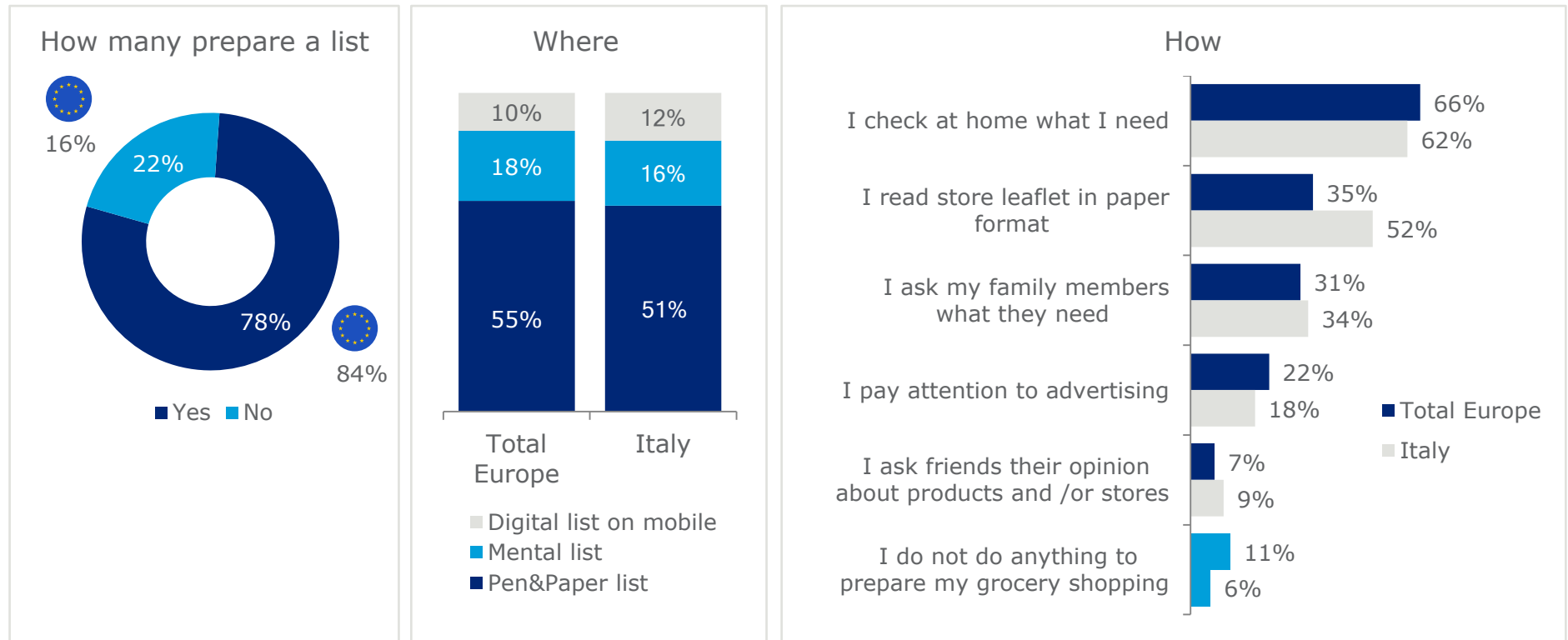


14. And did the info you find on the app or website make you?

Source: IRI European Shopper Survey - 2017

78% plan grocery shopping by preparing a list, 1 out of 10 write it on their mobile, paper lists are still relevant

Shopping list preparation – Italy and Total Europe bench



18. Do you usually prepare a shopping list before doing your grocery shopping?

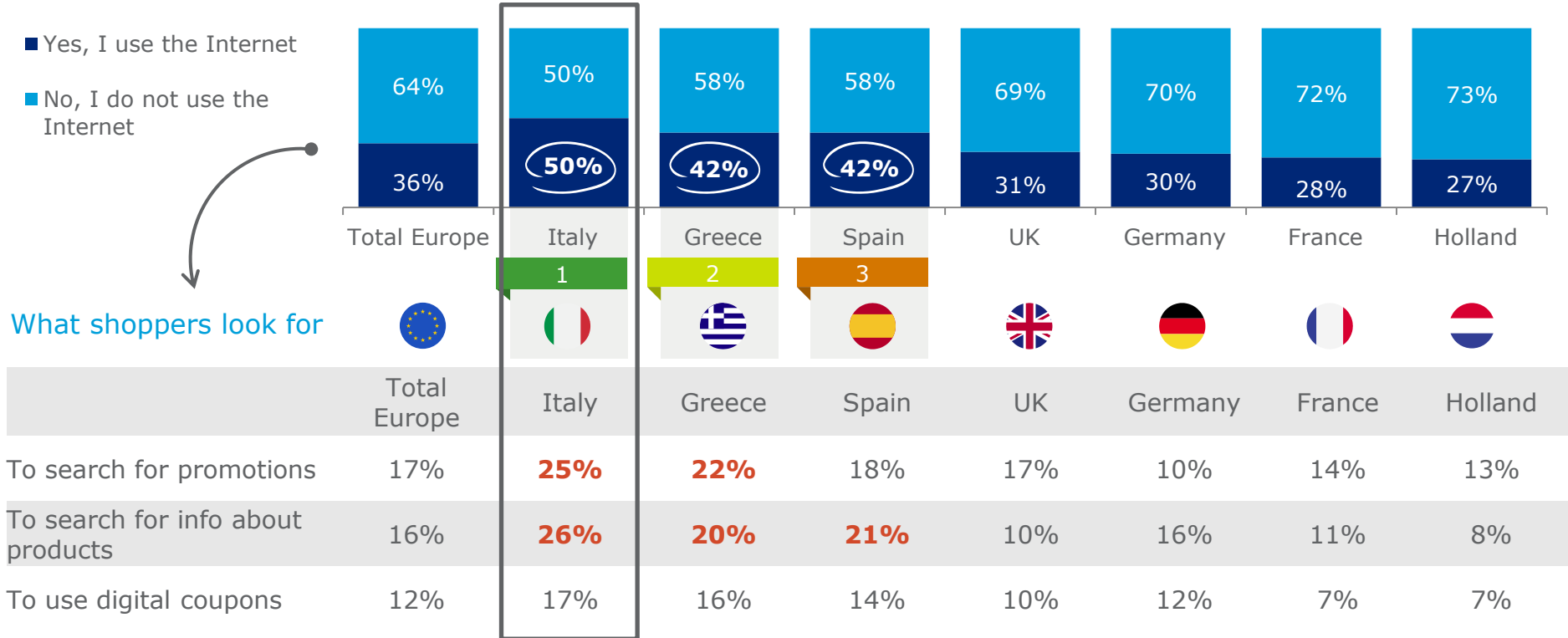
19. And what did you do to prepare your grocery shopping for these last 6 months, excluding visiting websites and writing a shopping list?

Source: IRI European Shopper Survey - 2017

1/3 of shoppers use the Internet when shopping in store, especially in South Europe

Seeking information
Shopping Preparation
Shopping List
In the Store
Online Shopping

Internet usage when in store for shopping



- In store shoppers keep looking for promotions and info about products

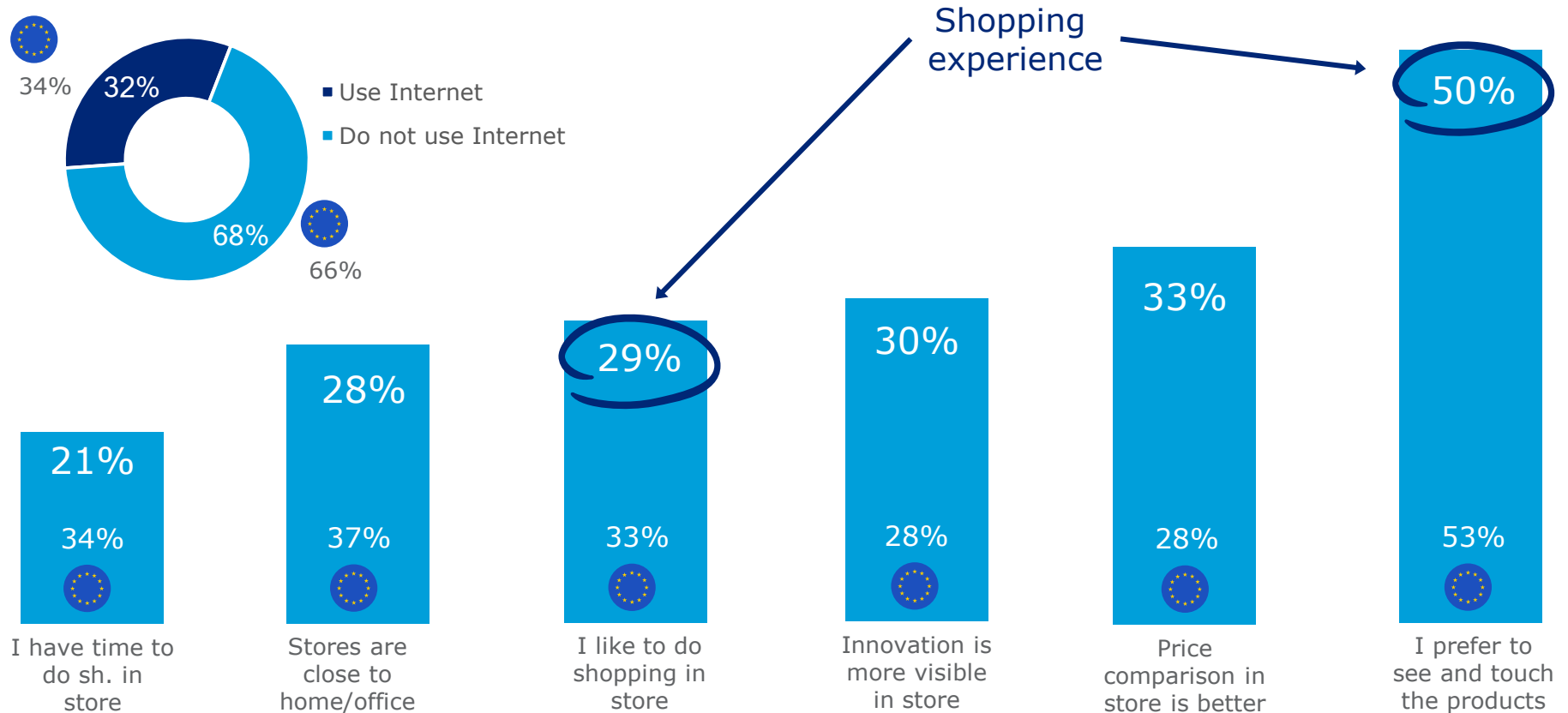
16. In the last 6 months did you use any mobile app or website when you were in store

Source: IRI European Shopper Survey - 2017

Barriers to Internet grocery shopping: shoppers prefer the experience in store to see and touch the products

Seeking information
Shopping Preparation
Shopping List
In the Store
Online Shopping

Barriers to Internet grocery shopping – Italy and Total Europe bench



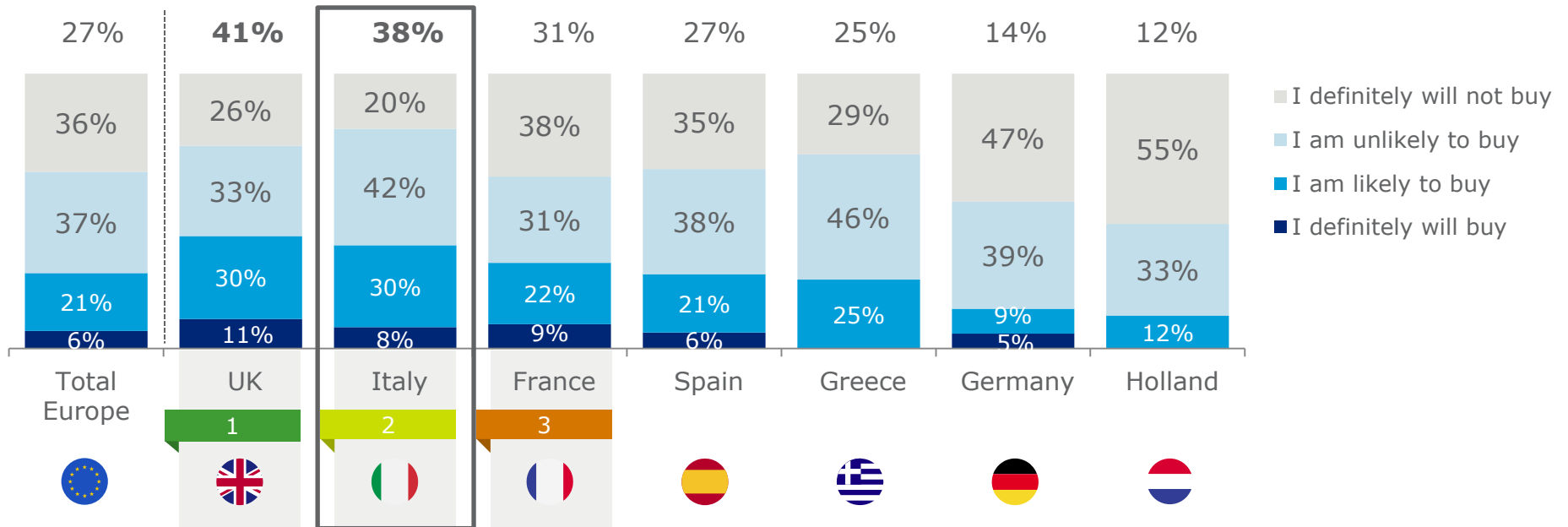
11. You state that you do not use the Internet to purchase your grocery products. Why don't you buy on the internet products for your family consumption?

Source: IRI European Shopper Survey - 2017

Grocery online shopping will potentially reach 38% of current Italian non buyers

% of potential online usage for grocery shopping

Top two positive boxes (*)



- UK and Italy show the highest potential

(*) It is the sum of «I definitely will buy» and «I am likely to buy»

12. Within the next 6 months, what is the probability that you will buy grocery products on the Internet?

Source: IRI European Shopper Survey - 2017

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Are the digital solutions changing the way for Grocery shopping among European shoppers?

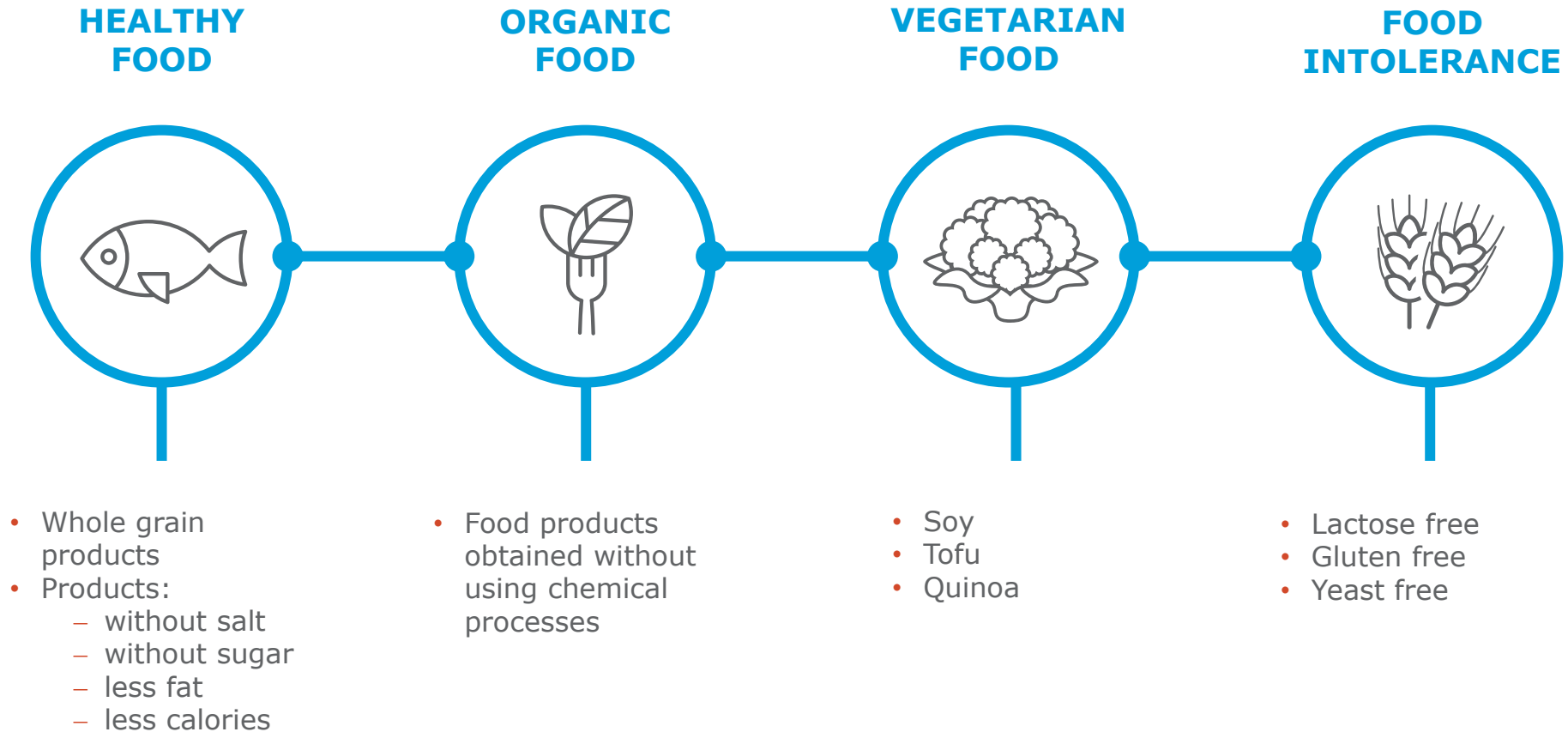
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How is food wellness in Europe?

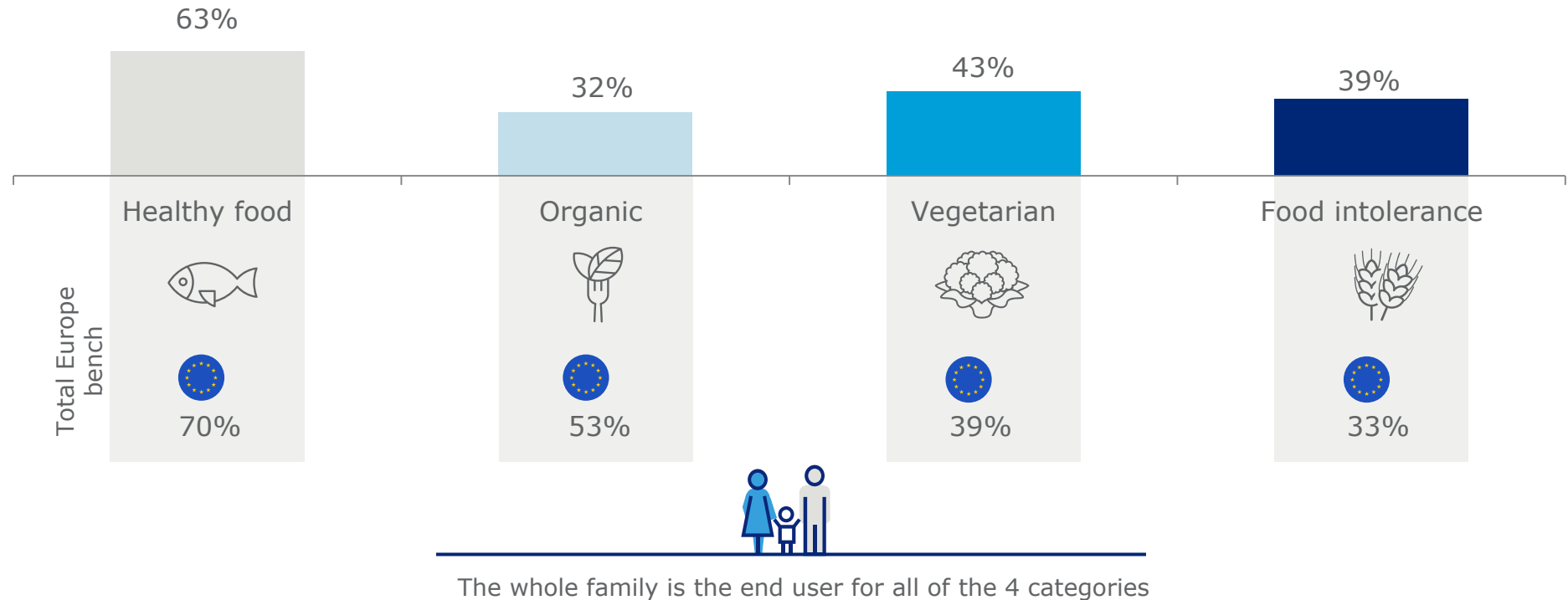


Wellness food definition



Wellness has become a relevant part of the usual “menu” of Italian consumers

% of wellness consumers – Italy and Total Europe bench



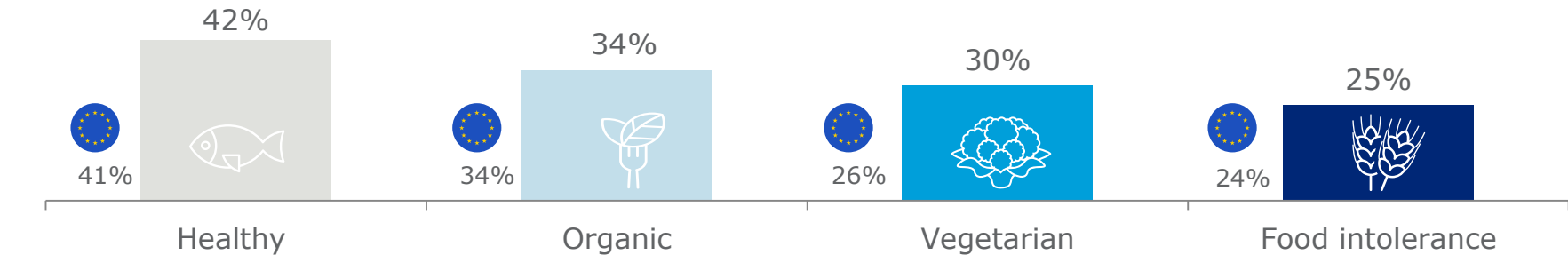
20. Let's speak about food wellness. Do you buy the following types of food for yourself or your family?

Source: IRI European Shopper Survey - 2017

For wellness food, spending intentions in Italy are similar to total Europe as penetration among families

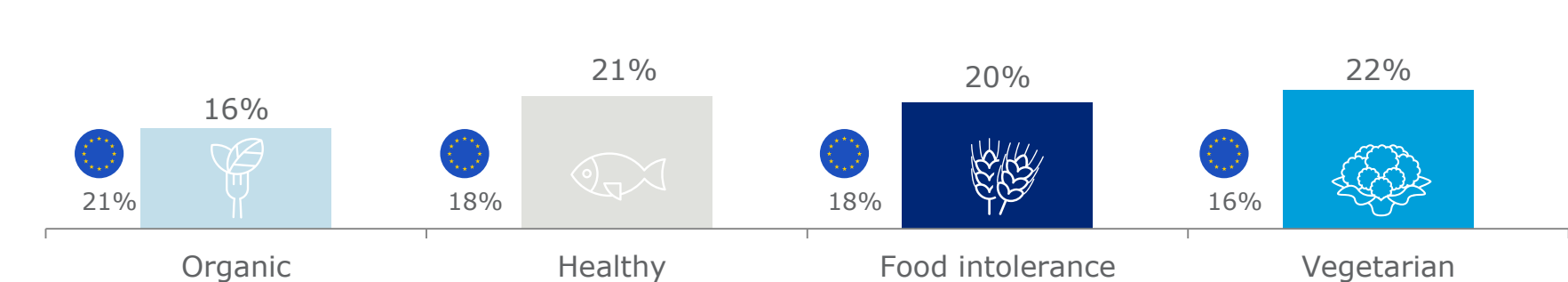
Italy and Total Europe bench

PENETRATION CHANGE NET SCORE



The values refer to the difference between «increased» and «decreased»

SPENDING INTENTION CHANGE NET SCORE



The values refer to the difference between «more than today» and «less than today»

21. Compared to 2-3 years ago, your consumption of these types of products has/is...increased, decreased, unchanged?

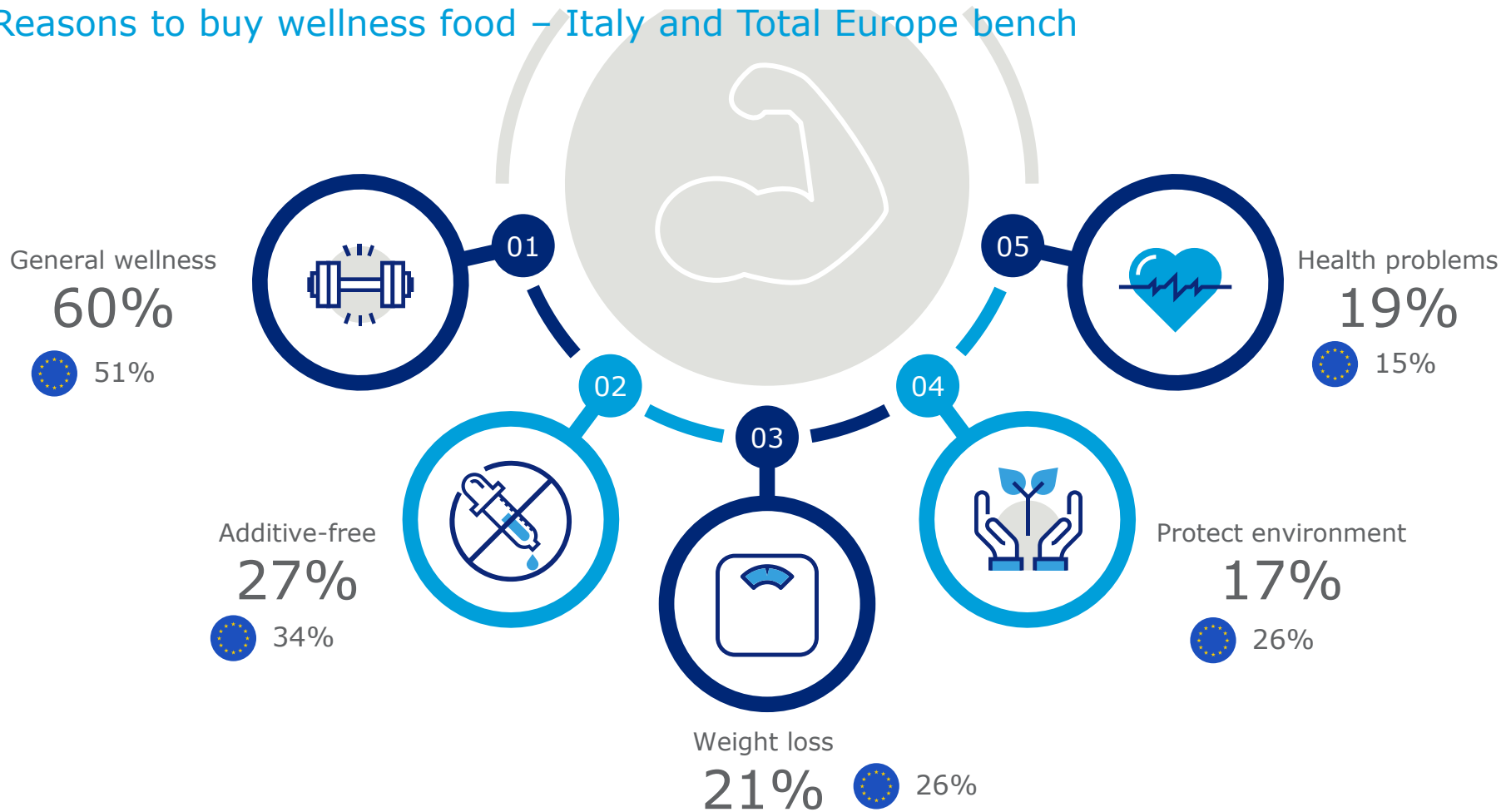
25. In the next 6 months, how much are you going to spend on the following products? The same as today, more than today, less than today

Source: IRI European Shopper Survey - 2017

A general sense of wellness involves 60% of Italian shoppers

Additive free and weight loss lead the search for better health

Reasons to buy wellness food – Italy and Total Europe bench

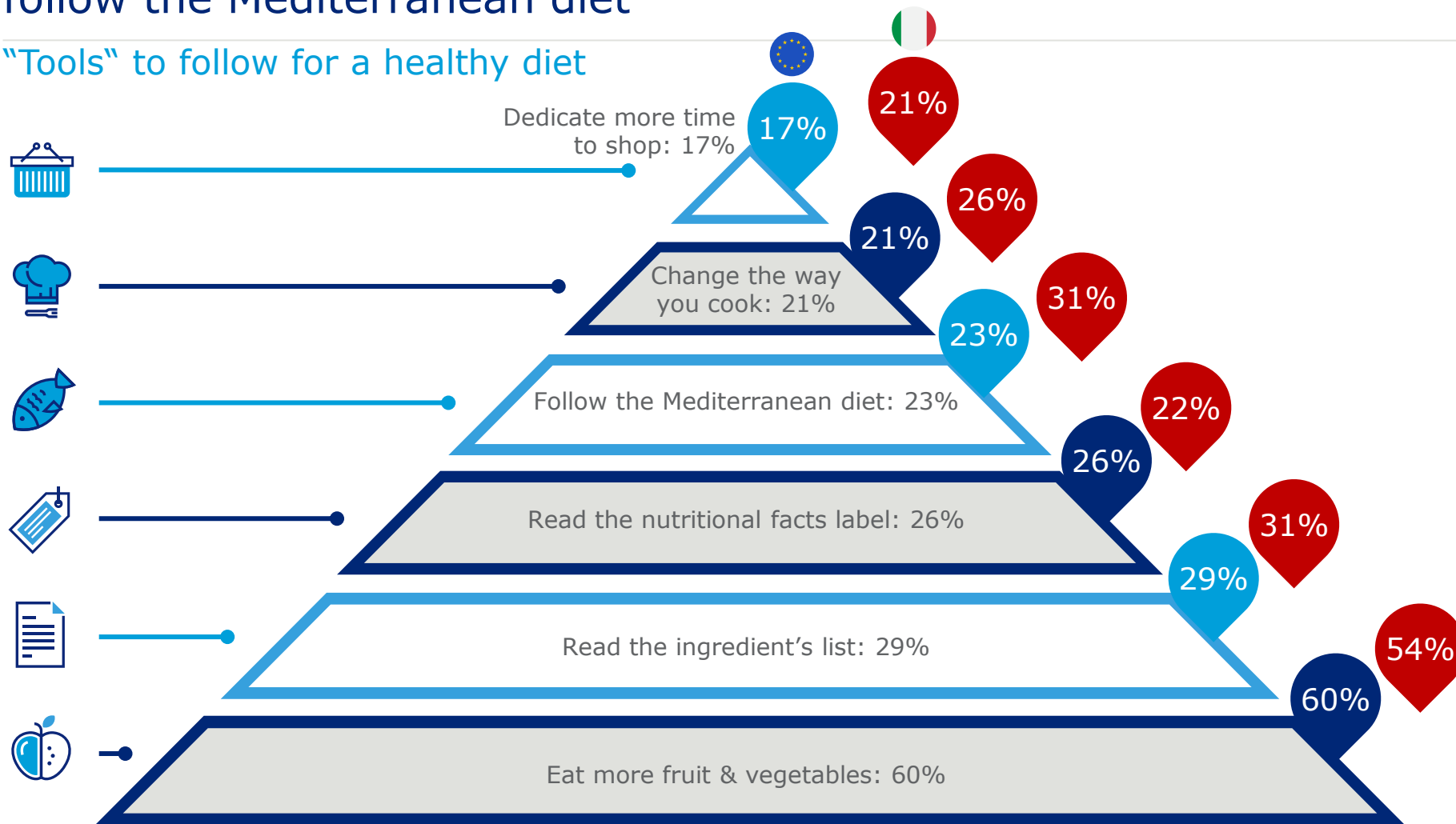


22. For which reasons do you buy these types of products for yourself and/or other family members?

Source: IRI European Shopper Survey - 2017

Eat more fruit and vegetables and ingredient lists are the “tools” which Italian shoppers use to achieve a healthy diet, in addition to follow the Mediterranean diet

“Tools” to follow for a healthy diet

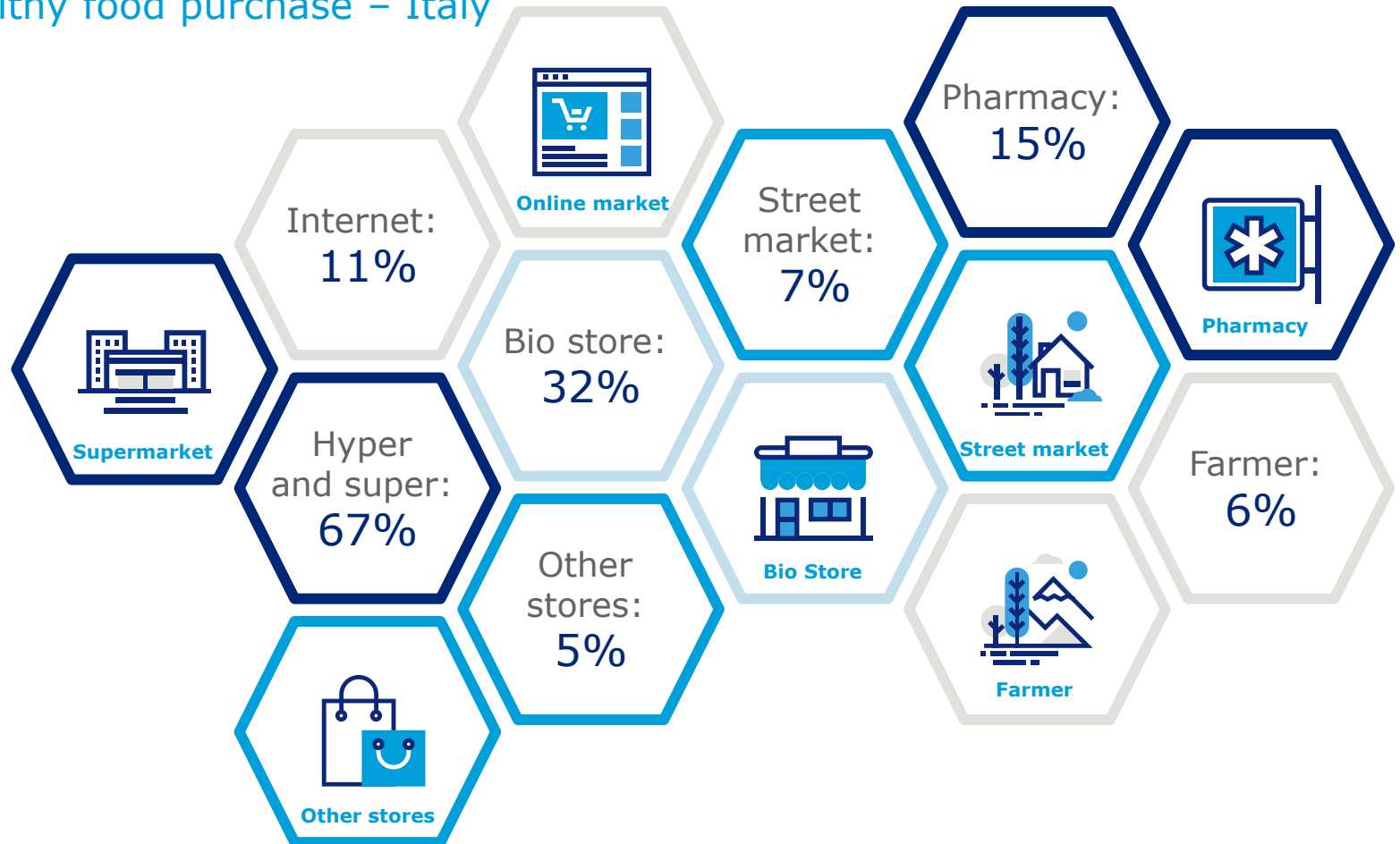


24. What do you think is the most important thing to do to follow a healthy diet?

Source: IRI European Shopper Survey - 2017

Bio stores, pharmacy and the Internet are the main alternative channels to the Mass Market to buy wellness food in Italy

Stores for healthy food purchase – Italy



23. In which types of stores do you buy these products?

Source: IRI European Shopper Survey - 2017

Contact

FOR MORE INFORMATION

To gain deeper insights, predictive analysis and recommendations on specific products, categories, segments, channels or retailers contact your IRI Consultant or email: XXX@iriworldwide.com



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