

Pambianco Fashion Summit

Harnessing luxury's cultural
impact and multi-channel reach



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Research methodology

- Online survey April / May 2023
- >2,700 consumers 18-65+
- UK, France, Italy, Spain and Germany
- 58% Female, 42% Male
- Respondents were selected among those spending at least €1,000 on luxury products per year or €500 on a single item

amazon ads

VOGUE
BUSINESS

Source: Vogue Business
Customer EU Survey, 2739
respondents, May 2023



Luxury Customers Insights



2/3 of the high-volume shoppers spends above €4,000 per year for luxury items

High-volume shoppers
20% of sample

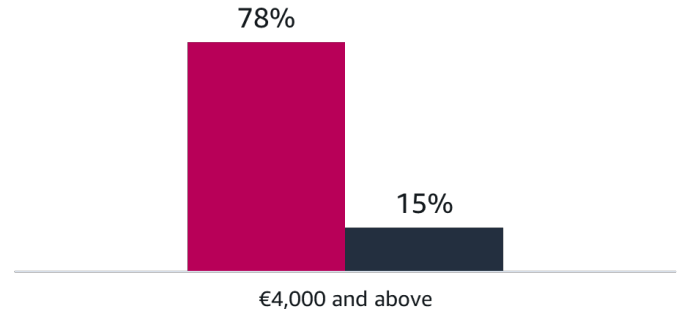


Purchased at least 5 luxury items priced over €500 in the past year

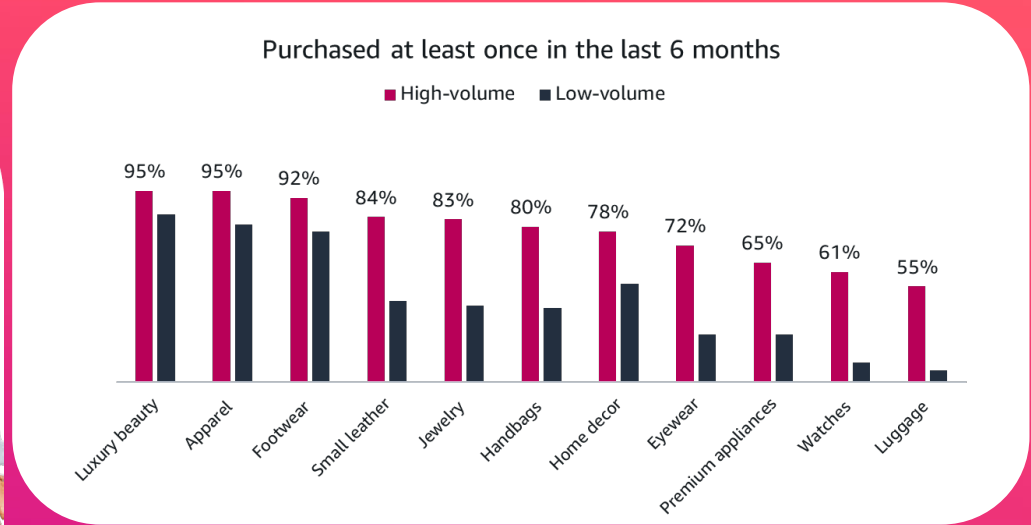


How much have you spent on luxury products in the past 12 months?

■ High-volume ■ Low-volume

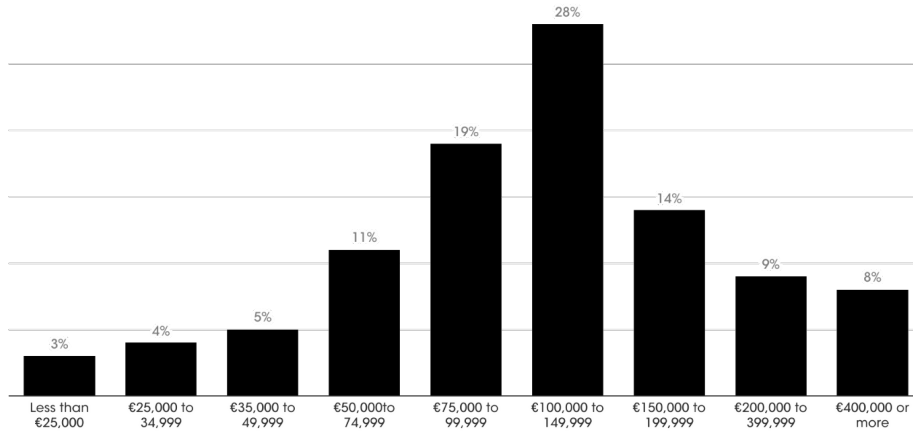


High-volume shoppers have a higher propensity and frequency on both fashion and non fashion luxury categories



Luxury consumerism is headed beyond the 'conventionally affluent' base towards a more aspirational base

Income of high-volume shoppers' household



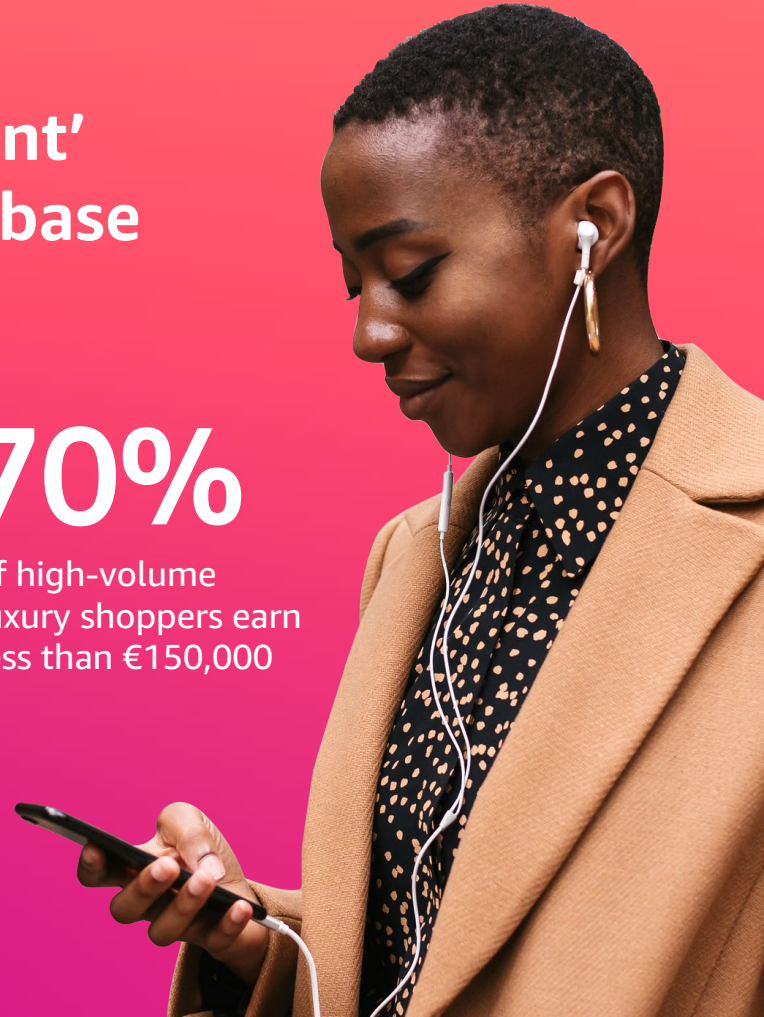
70%

of high-volume luxury shoppers earn less than €150,000

amazon ads

VOGUE
BUSINESS

Source: Vogue Business
Customer EU Survey, 2739
respondents, May 2023



A younger adult audience with a long consideration period



	18-44 Age range	>1 week before making a purchase decision
All surveyed shoppers	63%	57%
High-volume shoppers	76%	49%

Surveyed luxury shoppers and Prime membership

1 in 4

Luxury consumers prefer to learn about a product online before shopping for it in store

88%

of EU high-volume luxury shoppers declared to have Prime membership (79% among all luxury shoppers)



76%



69%



84%



86%



80%

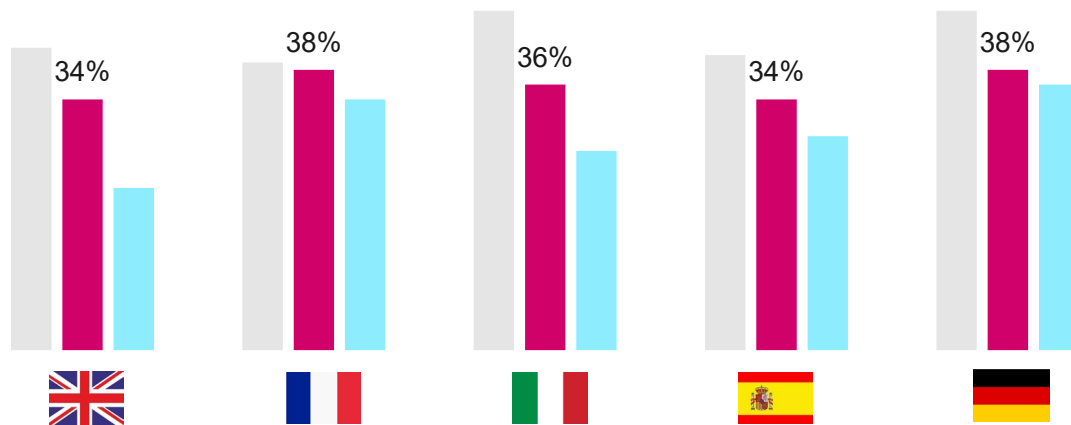
Inspiring Luxury Shoppers



Luxury consumers love watching content through streaming services and are ad receptive

Top 3 frequent activities across countries

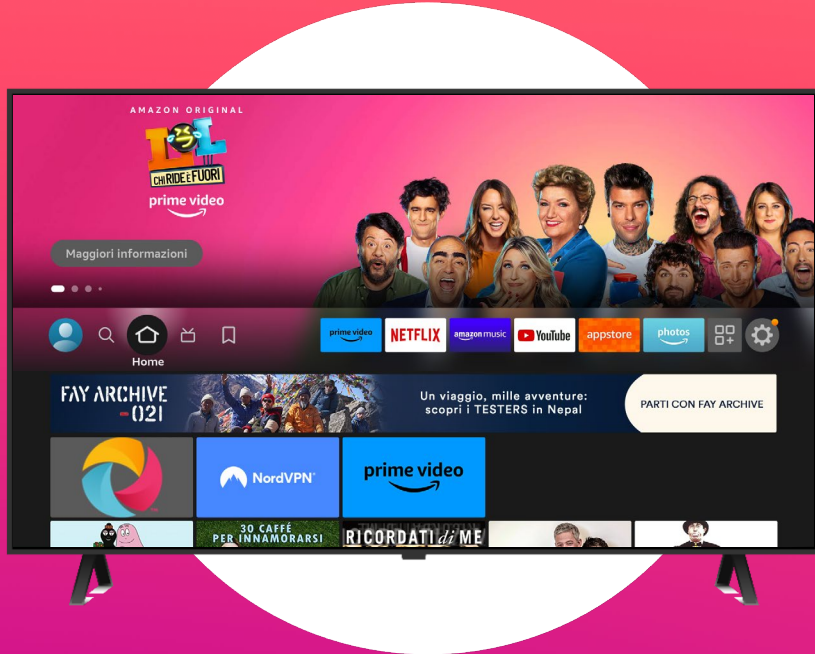
■ Play sports/exercise/hike ■ Watch content through streaming services ■ Cook/try new recipes



1/4

of all luxury shoppers are influenced by ads on streaming services

Culture and content go hand-in-hand



33%

of high-volume luxury consumers
want culture-led content from brands
vs 24% of all respondents

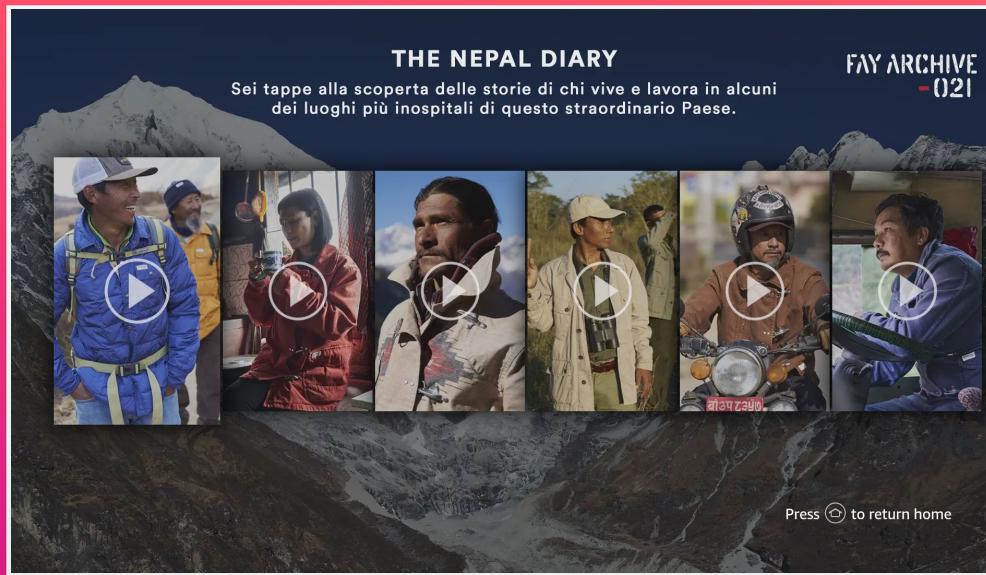
Action, Comedy and Drama are the most popular streaming content among all luxury shopper while luxury fashion shoppers have a higher propensity for art and travel documentaries, sport, romance, and musicals.



The world's most popular streaming media player

45% of surveyed Italian luxury shoppers have Fire TV¹

Most used streaming device: 31% uses it at least once a week¹



200MM+ Fire TV devices sold worldwide²

Customers are highly engaged: Italian customers use the device 1.7 hours per day on average²

Sources : 1. Vogue Business Customer EU Survey, 2739 respondents, May 2023 2. Amazon Internal Data, Q3 2023

Generational shifts lead to cultural evolution

3x

Gen Z and Alphas are expected to grow threefold among luxury shoppers against other consumer cohorts by 2030

amazon ads

VOGUE
BUSINESS

Source: Vogue Business
Customer EU Survey, 2739
respondents, May 2023



twitch



88%

of Italian luxury shoppers who use Twitch, use it at least once a week and

55%

use it even daily¹

35MM+

Average daily visitors²

2.5MM+

Average viewership at any given moment²

7MM

Streamers go live each month²

amazon ads

Sources: 1. Vogue Business Custom EU Survey, 507 IT respondents, May 2023

2. Twitch Internal Data. Italy Data. Monthly Unique Viewers. Daily Active Viewers. Monthly Hours Watched. April – June 2023. Hours Watched includes 92% live traffic and 8% VOD.

Amazon Music live on Twitch and Prime Video



amazon music **LIVE**

ELODIE

AL FORUM

10:44

12 MAGGIO ORE 20:30

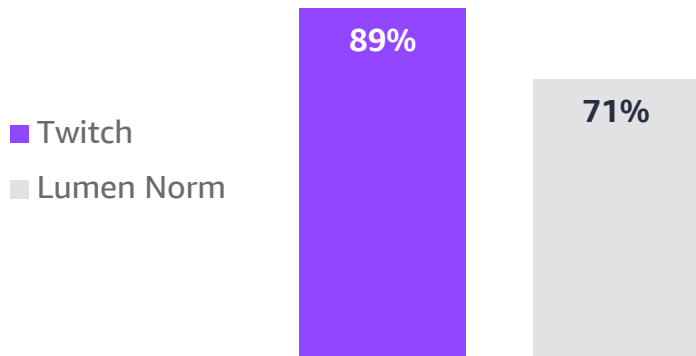
LIVE DAL MEDIOLANUM FORUM

Powered by      



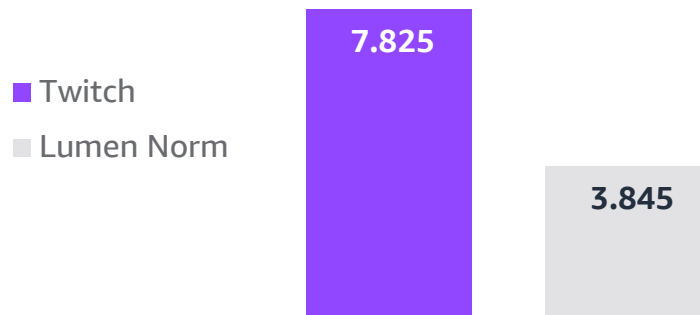
Ads on Twitch are more likely to be **viewed** on **both desktop and mobile** devices when compared to the Lumen norms

% of viewable ads that are viewed



Video formats on Twitch deliver a 103% increase in attentive seconds compared to Lumen's norms

Attentive Seconds, per '00 imps. (APM)



Surveyed luxury shoppers and Prime Video usage

64%

Declared to use Amazon Prime Video at least once per week

79%

Among high-volume shoppers



53%



56%



72%



75%



67%





Prime Video watchers insights



71%

of watch time
happens on
Connected TV

15

viewing sessions
per months



Source: Amazon internal, May-July 2023, IT



Prime Video watchers insights



45%

Age 18-44

83%

Age 18-64

Affinity index vs. 18+ Italian population	18-24	25-34	35-44	45-54
	121	124	132	118

115idx

Live in cities with >500k inhabitants

132idx

Have a degree

112idx

High school diploma

142idx

Manager/Officer /Supervisor role

125idx

Students

118idx

High income earner

Key Takeaways

Multi-channel consumption is on the rise

- All customers, including luxury and fashion ones, are using devices and services to make their daily lives easier and more enjoyable.

Online streaming is playing a starring role

- More than a quarter of luxury shoppers surveyed were influenced by ads on streaming platforms.

Luxury brands need to:

- Be authentic: understand consumers' behavior and how it is evolving to connect with their passions at the right moment and place.
- Consider premium streaming services where consumers' attention is high and they can find exclusivity.

fire tv



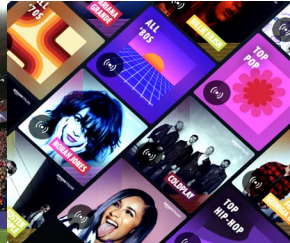
twitch



prime



amazon music



amazon alexa



Thank you!

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