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Retail Insights

2025

**New Retail is
accelerating**

Retail Trends 2025

Locala

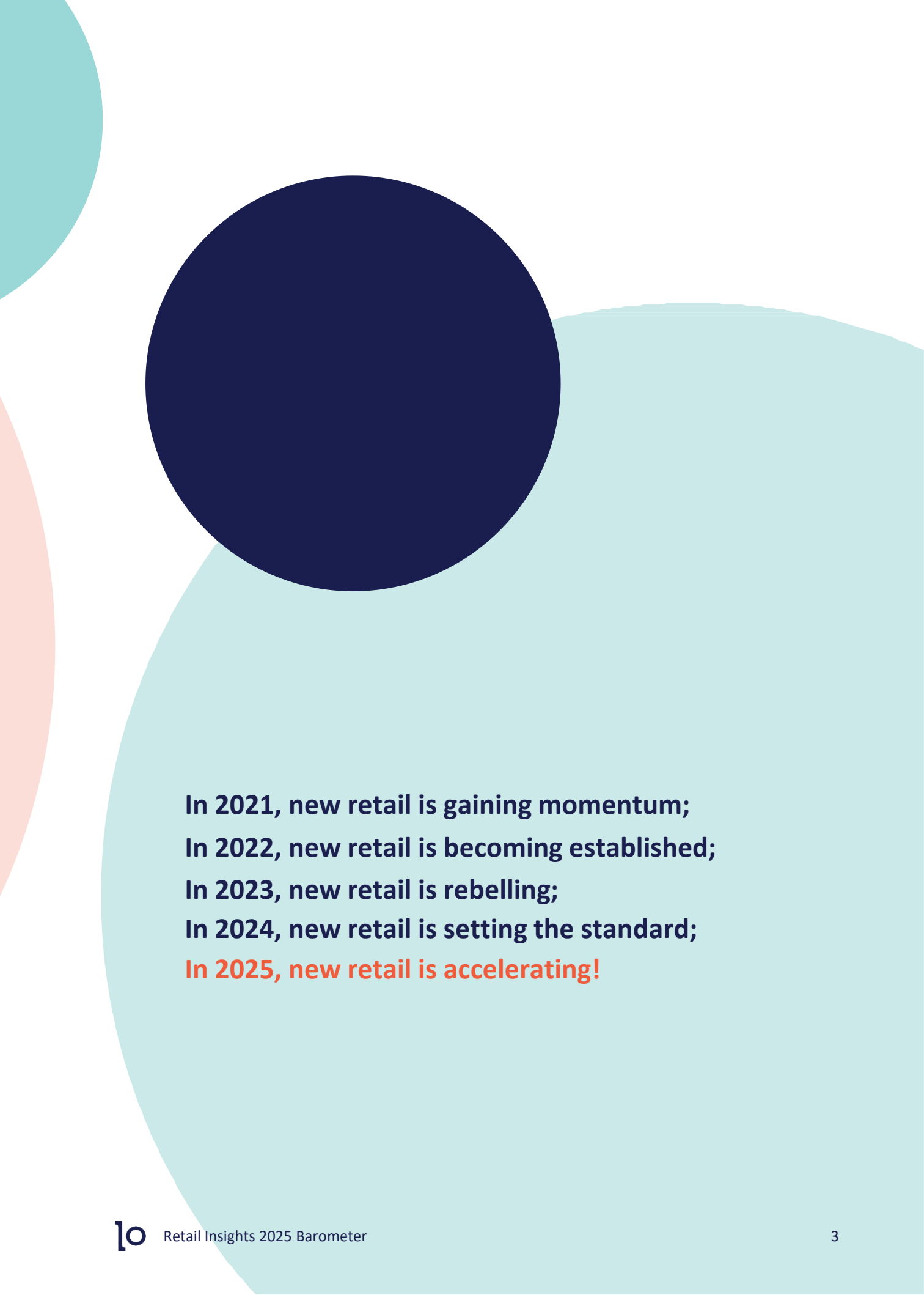
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Acknowledgements

We would like to thank **Amaury Laurentin**, **Founding President of Marketing Insight**, who supported us in the development of this initiative.

Layout: Véronique Bastien.





**In 2021, new retail is gaining momentum;
In 2022, new retail is becoming established;
In 2023, new retail is rebelling;
In 2024, new retail is setting the standard;
In 2025, new retail is accelerating!**

New Retail is accelerating

Editorial



Sandrine Préfaut
General Manager, Europe

In 2025, retail is accelerating its transformation, driven by the rise of artificial intelligence (AI), data, and the omnichannel experience.

Far from being mere trends, these developments have become strategic imperatives for companies looking to remain competitive in a challenging economic environment and an ever-evolving market.

It is undoubtedly a year of (rapid) trade-offs but also one of strategic innovation, with retail companies at a decisive turning point. The battle will be won by companies that can innovate quickly through technology while maintaining a balance between personalization, long-term engagement, and profitability.

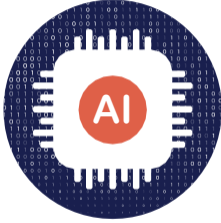
Companies that successfully navigate these demands will secure long-term success in a complex and diverse market. Another key challenge will be integrating data protection, which now plays a central role.

Retail Trends 2025

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1. AI & data for omnichannel commerce

Nearly 60% of large companies use **AI-based** solutions

The year 2025 will mark a decisive turning point in the evolution of artificial intelligence toward an intelligent ecosystem.

→ Far from being a standalone tool, AI is evolving into a fully interconnected ecosystem, reshaping the way we work and think.

→ We are witnessing the advent of AI networks. The adoption of generative AI, previously siloed within organizations, is now skyrocketing and giving rise to a multitude of specialized AI agents working together to solve complex tasks.

→ This orchestration of interactions between AI agents and automated workflows promises a significant increase in productivity.

The adoption of AI in retail could rise from 40 to 80% by 2027 (IBM).

Retailers will increase the automation of internal processes to reduce labor costs.

Routine tasks can be delegated, allowing employees to focus on creative and strategic activities.

The rise of machine learning technologies and advanced algorithms will facilitate an even more in-depth analysis of customer data.

In addition, the development of generative AI will transform content creation, making

each interaction more targeted and relevant to the consumer.

Experts anticipate the emergence of AI systems even more capable of predicting market trends and helping retailers adjust their offers in real time for optimized inventory management. Predictive analytics will also enable faster order management.



We are entering the era of "omnimodal" commerce. AI processes and generates multiple types of data, or "modalities" (text, images, audio, video, etc.), in a fully seamless and integrated manner. It incorporates all types of sensory data, including visual and behavioral inputs, to enable a comprehensive understanding of the customer.



Ocado, an English online supermarket, has automated warehouses using intelligent robots coordinated by AI. Predictive algorithms take care of inventory and delivery management. Its technology platform is being sold to other retailers (e.g., Kroger in the US), redefining its business model as a tech platform.

92% of companies now consider **data quality a strategic priority**

Better data favors the quality of data rather than its quantity. These developments require a rethinking of priorities and architectures, far beyond simple technological adjustments.


In 2025, experts predict that real-time analytics solutions will extend across all marketing functions, enabling action before opportunities or risks even materialize.

This industrialized approach to data is becoming a prerequisite for leveraging demanding use cases such as generative models or AI-powered assistants.

According to a recent study (2024), 92% of companies now consider data quality a

strategic priority, compared to only 75% five years ago.

The stakes are high at a time when data is fueling most key processes: customer insights, automation, decision support, innovation, and more. Without reliable, comprehensive, and up-to-date data, it is difficult to unlock the full potential of these projects or generate meaningful ROI.



Real time is becoming
an essential lever
defining the mechanisms
of action within
companies.

Qualitative Focus

Qualitative component with 10 in-depth interviews, including 5 members of the Executive Committee (COMEX). Interviews conducted in March 2025.

"AI is already being used for sales forecasting, CRM content, and inventory optimization."

"AI is a real revolution, not a buzzword: it helps us go faster and work more efficiently."

"Data allows us to find clusters of behaviors, and has become a key asset."

→ AI at the service of the customer experience



10% of the turnover of the **castorama.fr** site comes from Hello Casto. This conversational agent is available on the Castorama website, next to the text search engine. It provides answers on the full range of 60,000 catalogue items and manages 100,000 conversations per month in France alone.

→ And at the service of employees



Carrefour is launching an AI platform for its employees based on the Gemini model. Starting in December 2025, "CarrefourIA" will enable all Group employees who wish to do so to use this technology on a daily basis in an environment secured by the Group. CarrefourIA analyzes documents or can help write or rephrase texts in more than 40 languages.

→ AI optimizes productivity



Enel is the leading electricity company in Italy. The company uses AI to optimize the predictive maintenance of its energy infrastructures (power plants, power grids). Thanks to data, Enel anticipates consumption peaks and manages energy production and distribution more intelligently. Enel X, their innovative subsidiary, offers smart city and energy efficiency solutions based on data.

→ Data, a key issue for retailers



The **Kering** Group is making its data more accessible to its teams. The in-store sales associate has access, via their clienteling app, to alerts about customers at risk of churn and those eligible for VIC (Very Important Client) status.



2. E-commerce is accelerating its growth

2,162 e-commerce sites were launched worldwide each day between 2024 and 2025

Online shopping has become a staple in the daily lives of millions of consumers.

Today, 2.77 billion people worldwide shop online, and this trend shows no sign of slowing down. This comes as no surprise, as widespread access to smartphones and the internet, combined with increasingly efficient logistics, makes online shopping convenient and accessible across the globe.

Exclusive online shopping events offering huge discounts, such as China's Singles' Day, Amazon Prime Day, Black Friday, and Cyber Monday, have also played a role

a role in encouraging buyers to take the step of buying online.

21% of retail purchases will take place online in 2025, the highest rate recorded to date. 22.6% of total retail purchases are expected to be made online by 2027.

In 2024, B2C e-commerce already accounted for nearly 5.5 trillion dollars.

By 2027, this figure is expected to reach 8 trillion dollars. This acceleration shows that online sales are becoming an increasingly profitable strategy for businesses worldwide.

Qualitative Focus

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"E-commerce accounts for 60 to 70% of our sales."

"Growth continues; it is now a structural pillar."

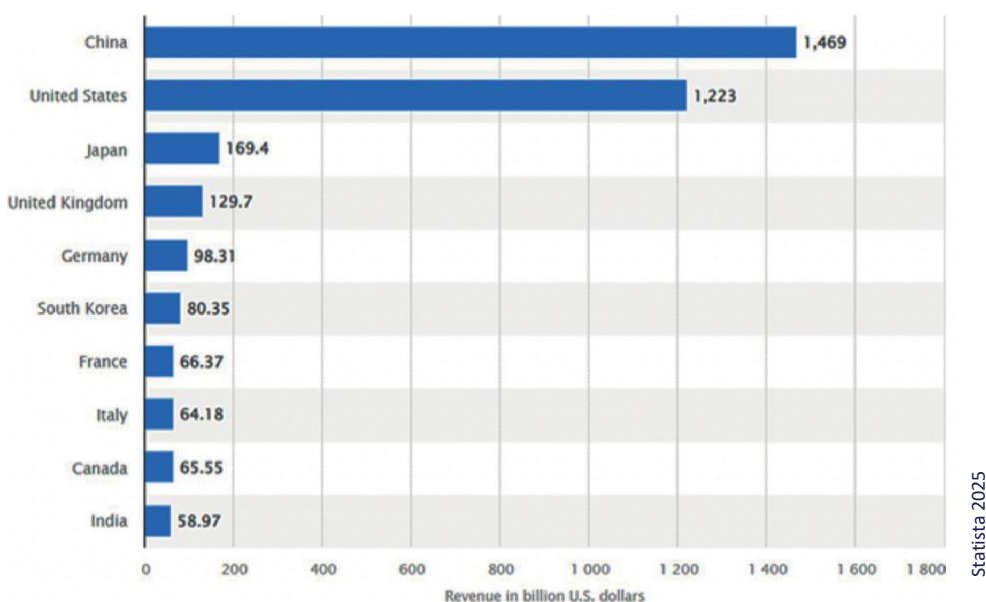
The global e-commerce market is set to exceed 6.86 trillion dollars in 2025 (i.e. +8.37% vs. 2024).

China still dominates e-commerce



China is the most powerful country in the e-commerce sector, followed by the United States, Japan and the United Kingdom.

Worldwide e-commerce turnover in 2024 by country (in billions of dollars).



France is the 9th largest market in the world and the 2nd largest in Europe.

→ 7 out of 10 French people buy online.

→ Mobile sales account for 23% of transactions. Of these mobile sales, 53% are made directly via apps.

→ 76% of French online shoppers go through Facebook to make their purchases.

Instagram is used by 23% of them, while Snapchat attracts 11% of these shoppers.

→ 78% of all e-commerce transactions are made via bank cards, while 14% are made using digital wallets (Lydia, Paypal, Revolut, etc.).

→ Marketplaces boost ecommerce



ASOS was founded in 2000 by Nick Robertson and Quentin Griffiths, in the Camden Town district of London, UK. ASOS has evolved from a traditional e-commerce site into a marketplace featuring major third-party brands such as Nike, Topshop, and The North Face. This shift has enabled the platform to expand its catalogue while increasing its appeal.



Bol.com is the largest local marketplace in the Netherlands and Belgium, with more than 34 million items. Bol.com, originally a straightforward e-commerce retailer, has evolved into a full-fledged marketplace open to a wide network of Belgian third-party sellers, greatly expanding its offer.



Nordstrom, a chain of stores in the United States, has launched its Marketplace. Instead of opening its site to a wide range of sellers, the company has carefully selected its brand partners "to ensure that our marketplace experience fosters the relevance and inspiration that Nordstrom customers expect from us."

→ Logistics, ever bigger and faster

Lidl opens the largest logistics platform in Europe



Lidl has chosen the town of Ablis, southwest of Paris, to officially launch its very first and largest logistics platform in Europe, spanning 87,000 m². For the past seven years, Lidl has been working on the construction of this site, which it intends to serve as the flagship of its 25 other logistics platforms in France.

Picard offers an ultra-express delivery service



Picard offers home delivery in less than 30 minutes for 70% of French people. Since April 2024, customers of the Uber Eats app can have their Picard products delivered, from a selection of 400 items.

Esselunga launches its fast delivery service



Esselunga is an Italian company and retail brand.

In response to growing demand for convenience and speed, Esselunga has accelerated its transition to e-commerce with the launch of the "Esselunga a Casa" service, which enables home grocery delivery in under 24 hours in major Italian cities.



3. Mobile confirms its supremacy

More than 74% of online purchases **are made on a smartphone**

In 2025, m-commerce is emerging as an essential pillar of the global digital economy.

By the end of 2024, billions of users, combined with ease of use, had driven the growth of mobile commerce, making it the primary gateway to e-commerce.

More functional and convenient than the computer, the mobile phone is becoming a preferred device for consumers. This trend benefits e-retailers as it encourages spontaneous purchases and facilitates customer loyalty.

→ 1.65 billion people worldwide are expected to make a purchase via their mobile in 2025.

→ 72% of shoppers say they use their smartphones in-store to browse the internet for comparable deals or to check product reviews.

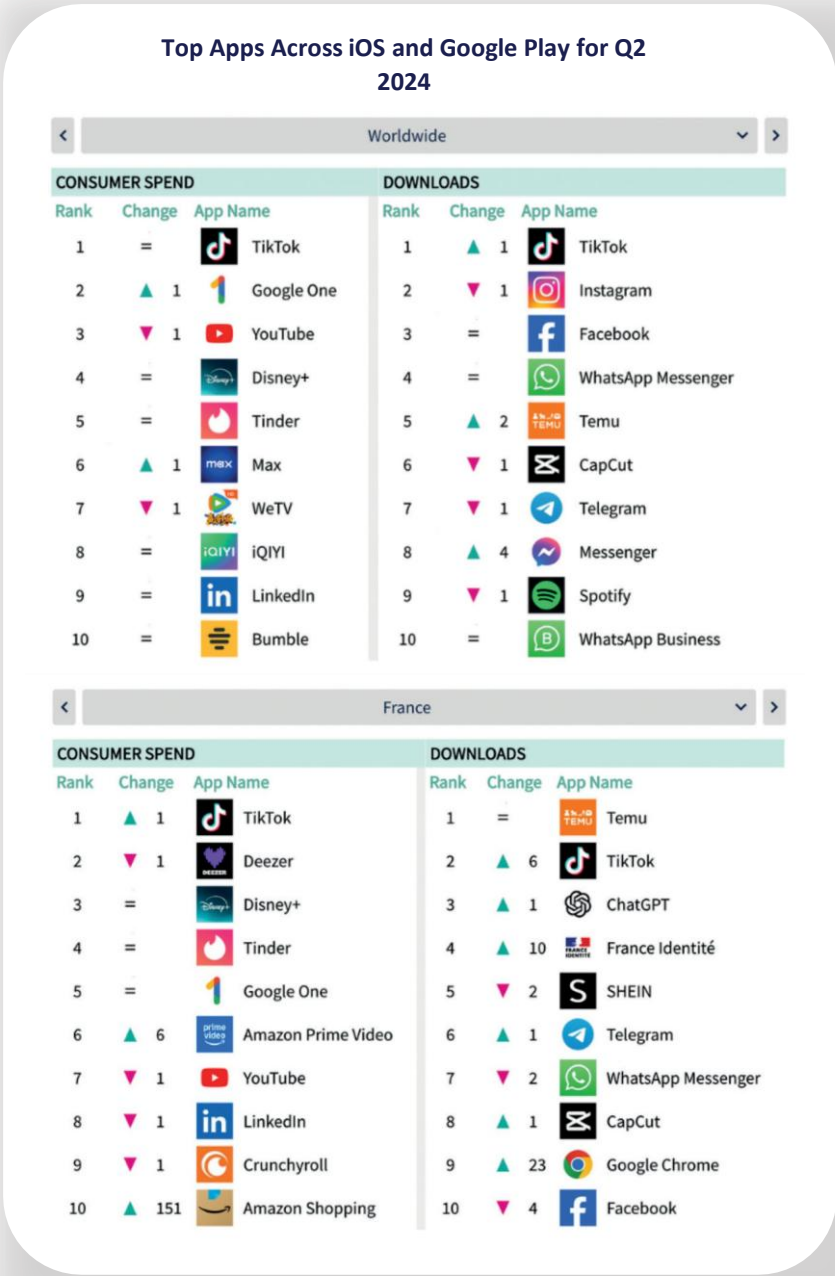
→ Global m-commerce sales are expected to reach \$3.4 trillion in 2027. M-commerce sales are expected to account for 59% of total global e-commerce in 2025.

74% of global e-commerce transactions were made via mobile in 2024, compared to 68% in 2020.

The best shopping apps (World and France)

Sensor Tower, a digital marketing specialist, has released its Digital Market Index, ranking the most frequently downloaded apps across

the globe, as well as those where consumers spend the most money.





Intermarché has chosen to replace paper leaflets with digital campaigns on mobile. Conducted in collaboration with **Locala**, the initiative uses geolocated campaigns with a highly targeted multi-local approach to better reach consumers.



Sephora's mobile app is at the heart of its omnichannel strategy in 2025, serving as a bridge between digital and physical channels to deliver a seamless and personalised customer experience. At the same time, initiatives like the Accelerate program strengthen Sephora's commitment to innovation and diversity.



TikTok has launched "TikTok Shop," an integrated e-commerce platform that enables creators and brands to sell products directly through the app.



Leroy Merlin Italia has transformed its mobile app into a true service hub, designed to support customers at every stage of their journey. The app allows users to browse the catalogue, order products, book installation services, and even view items in augmented reality directly at home. This mobile-first approach is part of a phygital strategy where digital complements and enhances the in-store experience.



For **ZARA UK**, mobile is becoming a natural extension of the physical store, blending e-commerce with the in-store experience. The mobile app allows users to scan product codes in-store, reserve items, order them online, or locate their availability in-store.

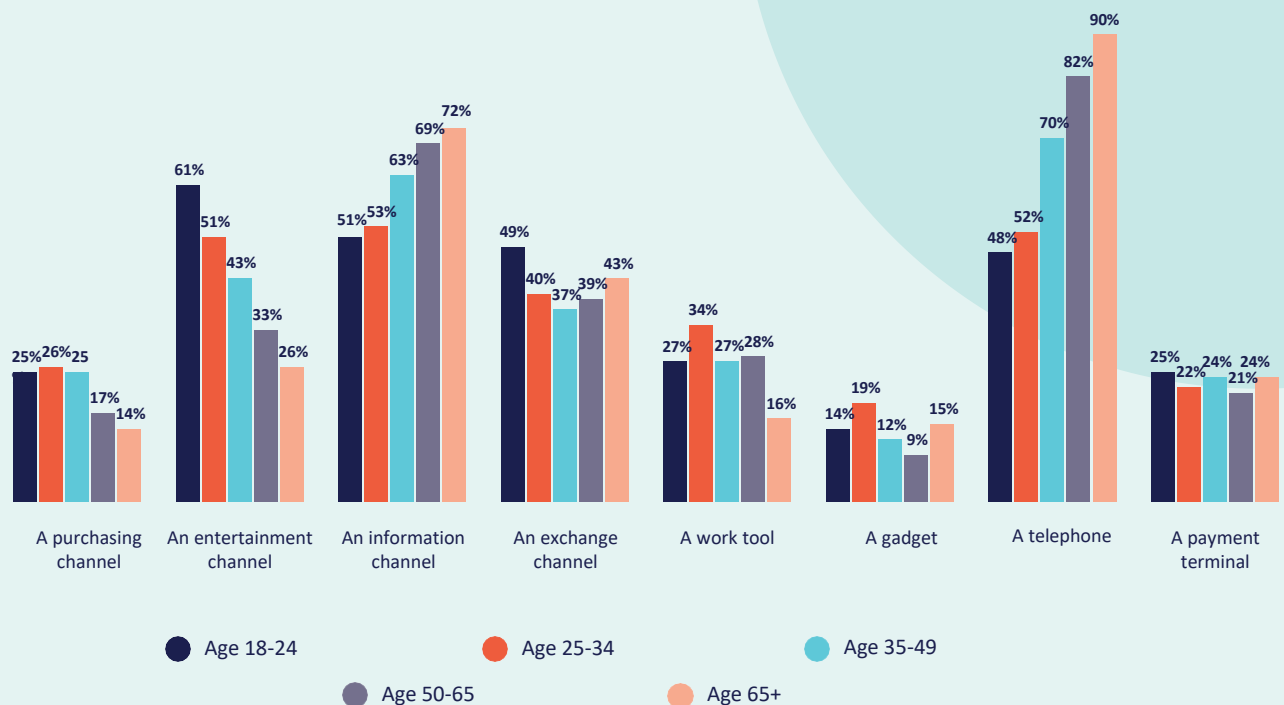
Quantitative Focus

B2C

→ What does your mobile phone mean to you?

The phone is still mainly seen as a communication tool, especially in France, but usage varies greatly by age. The older the age group, the more it is viewed as an information channel. Conversely, younger generations, particularly those aged 18 to 34, use it primarily for entertainment (61% of 18 to 24 year olds and 51% of 25 to 34 year olds, compared to 26% among those aged 65 and over).

This usage reflects a more playful, multiscreen approach to using mobile devices.

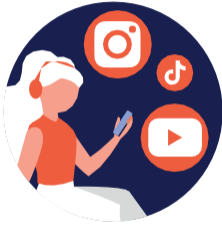


Qualitative Focus

Qualitative component with 10 in-depth interviews, including 5 members of the Executive Committee (COMEX). Interviews conducted in March 2025.

"It's an essential lever. The mobile has become the natural gateway."

"We use it for drive-to-store, with effective geolocalized updates."



4. "Z-commerce" explodes

Sales on social networks are expected to reach **\$1.9 trillion in 2025**

This trend is expected to increase in 2025 with even more advanced features to facilitate purchases within social networks.

Platforms like Instagram, TikTok and Pinterest continue to develop integrated shopping features, further blurring the lines between entertainment and shopping, thereby normalizing impulse purchases.

→ Reddit, with 1.22 billion users and historically seen as a discussion platform, is opening new opportunities for brands with growing engagement in e-commerce, influencer marketing, and targeted advertising.

Live shopping is expected to reach 68 billion dollars in the United States by 2026.

Growth is driven by technological advances:

→ The integration of augmented reality technology allows consumers to engage in a more immersive shopping experience, bridging the gap between online and in-person retail.

→ Live shopping is becoming smoother thanks to improved streaming technologies, enabling seamless real-time interaction. Driven by social media, it particularly appeals to younger generations thanks to the growing integration of shopping features directly within platforms like Instagram, TikTok, and Facebook.

Facebook is expected to have more than 69 million social buyers in 2025 and Instagram follows with 47 million social buyers.

→ Retail is coming to gaming platforms



Walmart already embodies this vision of the future. By partnering with **Roblox**, the company is targeting Gen Z directly and strengthening its presence in emerging digital spaces. Through the "Walmart Discovered" universe, users can explore trending products, virtually purchase items, or even create their own aisles in a personalized storefront, all using the native currency Robux.



Virtual commerce is reaching a new milestone with the landmark partnership between **Roblox** and **Shopify**. For the first time, a major e-commerce platform will enable brands to sell physical products directly within a virtual world, paving the way for a deeply immersive shopping experience.

→ Integrated purchases are growing on social networks



JBC, a Belgian family ready-to-wear brand, has successfully modernized its image by focusing on a locally rooted social selling strategy. It develops mini-collections co-created with Belgian influencers, widely promoted on Instagram and TikTok, closely aligned with Gen Z trends. At the same time, JBC has begun a gradual Z-commerce approach by integrating direct purchases into stories and social posts, connected to its mobile app.

→ Live shopping is becoming more popular in Europe

KIKO MILANO

The Italian cosmetics brand **KIKO Milano** has integrated live commerce at the core of its digital strategy, with live selling sessions streamed on its website and major social platforms across Europe. These live sessions, combining beauty tutorials, product demonstrations, and personalized advice, enable immediate one-click purchases directly from the video.



The high-end beauty brand **Charlotte Tilbury** was one of the first in Europe to host interactive live shopping sessions via its website and social media, featuring live makeup artists and influencers. The brand integrates one-click purchasing during live sessions, targeting a young, mobile, and social native audience.

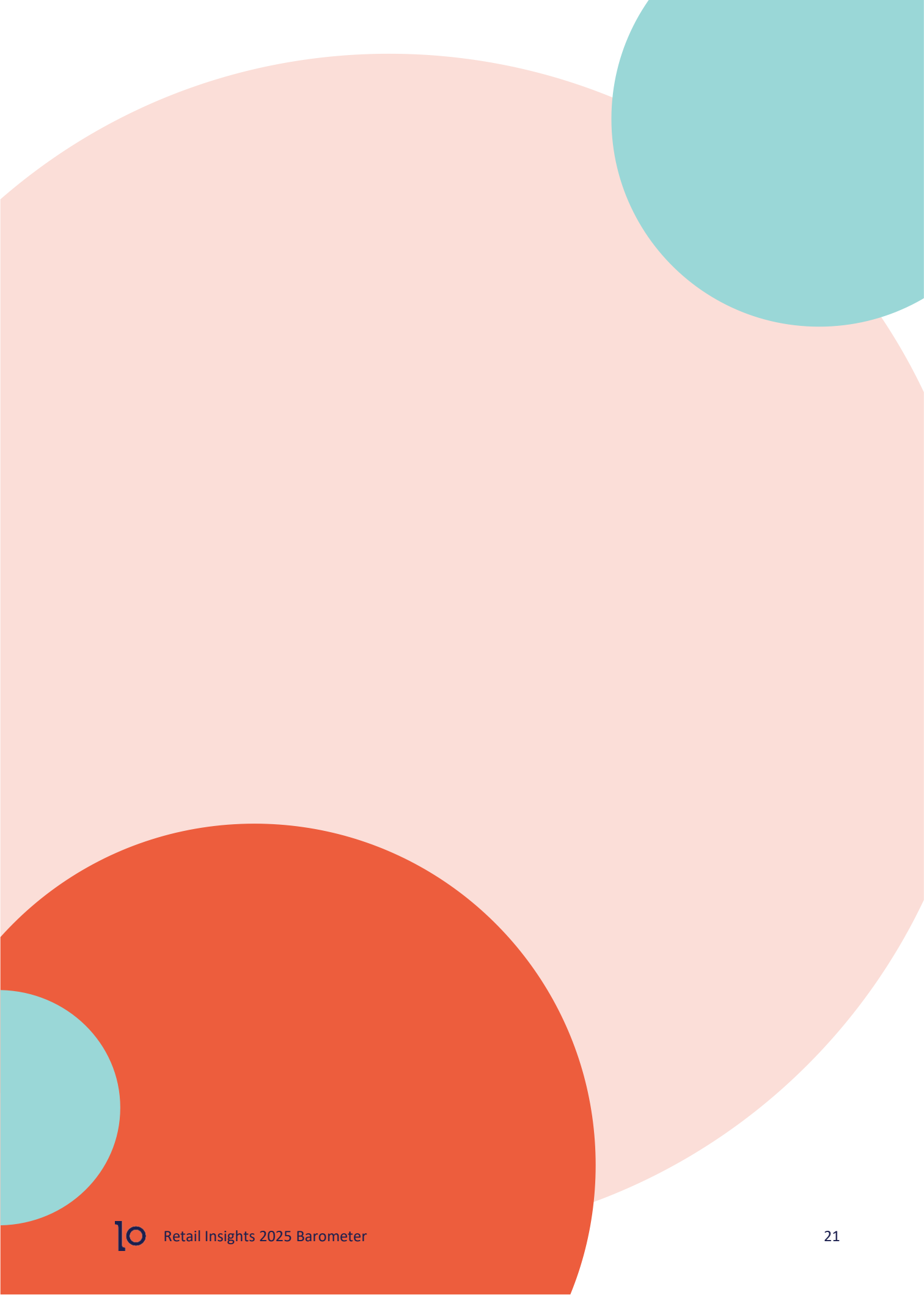
Qualitative Focus

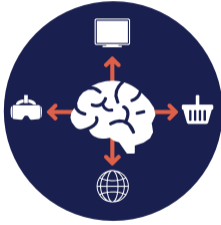
Qualitative component with 10 in-depth interviews, including 5 members of the Executive Committee (COMEX).

Interviews conducted in March 2025.

"We tested 100% AI campaigns on social networks, with amazing results."

"On TikTok, we were the #1 retailer in engagement."





5. Omnichannel strategies expand

70% of consumers favor a seamless shopping experience between different channels

To meet expectations for a seamless experience across all channels, online, in-store, and on social media, major brands have no choice but to adopt a unified omnichannel approach.

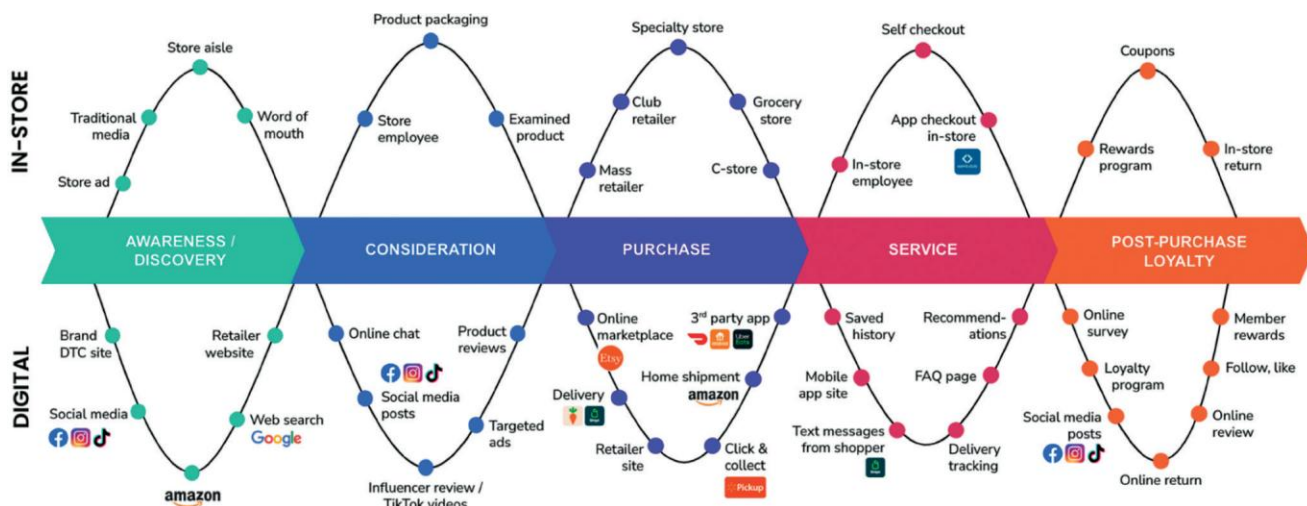
Customers can thus test products remotely, enjoy interactive experiences, and even explore immersive worlds through the metaverse or digital twins of brands that interact with consumers.

This demand drives investment in technologies that optimize every customer touchpoint.

Artificial intelligence and 3D enhance this dynamic by integrating realistic simulations in virtual reality (VR) and augmented reality (AR) into the shopping journey.

All this confirms that immersive omnichannel is indeed a lever for sustainable differentiation.

How do digital and physical touchpoints interconnect throughout the shopping journey?



Sources: Circana

AI-powered smart QR codes

In 2025, retail enters a new phase where physical and digital merge to create coherent, responsive, and personalized omnichannel experiences.

To meet these expectations, brands must rely on technologies that can centralize data and automate customer pathways, while providing customers with a seamless interaction regardless of the channel.

The QR code is becoming a key entry point: a simple scan provides access to enriched content (reviews, videos, features) or to

finalize an online purchase from a physical store. Enhanced QR codes go even further by linking each product to smart services such as traceability, waste reduction, targeted reminders, or even automatic checkout blocking in case of health issues.

Artificial intelligence and 3D once again enrich interactions by personalizing content in real time and creating tailored virtual environments.

The Metaverse, the future pillar of omnichannel

The Metaverse, although still difficult to fully grasp, is taking shape through a variety of hybrid experiences that are both entertaining, commercial, and relational.

Pioneers like Coca-Cola and Samsung have already entered this space: the former through collectible NFTs and virtual events, the latter with an interactive replica of its flagship store in New York. Alibaba, meanwhile, showcased its vision of the future of e-commerce on the Champs-Élysées during the Olympic Games: a digital journey where users create an avatar, assisted by AI, that personalizes clothing,

fragrances and music. In this vision of augmented commerce, every interaction becomes an opportunity for a richer, more useful, and more engaging connection. A commerce where technology doesn't replace humans but amplifies every step of the customer journey.



According to
Gartner,
companies that
adopt these
solutions see
customer loyalty
increase by 30%.

The shopping journey becomes a **seamless** experience

A customer can begin their journey by discovering a new bag on an Instagram ad, add it to their cart on a mobile app, and then choose to pick it up in-store (click and collect).

All these touchpoints must not only be connected but also provide seamless continuity, which is what sets omnichannel apart from multichannel.

In addition, once in store, they can access more information via a QR code.

Qualitative Focus

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"We've moved beyond the channel-by-channel approach; everything must be fluid and aligned."

"Promotion, pricing, message: everything is omnichannel, otherwise the customer drops out."

→ When the virtual and the real come together



In the online store **The Outset**, a cosmetics brand created by actress Scarlet Johansson, this virtual store on the Amazon website uses the design codes of fashionable beauty stores. The Internet user can explore this space and click on the items they want.

→ Mobile streamlines the shopping experience



Marks & Spencer is deploying a fluid and integrated omnichannel strategy where the mobile application plays a central role. It allows users to create shopping lists, scan products for payment without going through the checkout, or order online with in-store pickup. The brand is also innovating in-store with trials of smart mirrors in fitting rooms and RFID tags linked to screens, allowing real-time checks of an item's availability in other sizes or colors.



Starbucks offers a seamless omnichannel user experience. Each time a Starbucks user pays with a Starbucks card, they earn reward points. The linked app also allows customers to find stores, send gifts, pre-order drinks, and view new products. With the recent integration of Spotify, consumers can see the songs playing in-store and add them to their playlists.



The Belgian footwear brand **Torfs** has implemented a seamless omnichannel strategy, connecting its e-commerce site, mobile app, and physical stores. In-store, QR codes placed on products provide access to detailed sheets, customer reviews, and real-time availability in other stores.



6. Phygital, the new world

Phygital embodies the best of both worlds

The boundary between physical and digital is steadily fading, giving rise to hybrid shopping journeys that meet consumers' demands for simplicity and immediacy.

In 2025, phygital becomes a central performance lever for brands.

Its main asset? Creating seamless, personalized and consistent customer experiences, both online and in-store. It is this intelligent integration that reduces friction, speeds up conversion, and strengthens loyalty. For example, a customer can order online, pick up their product in-store and enjoy an enriched

experience thanks to demonstrations in augmented reality.

AI, data, and augmented reality transform every interaction into an opportunity. By analyzing behaviors in real time, brands can offer hyper-personalized deals at the right time and place.

AI no longer just meets expectations: it anticipates them. Coupled with AR, it creates immersive experiences that engage, retain and differentiate. A real growth lever for brands in 2025.

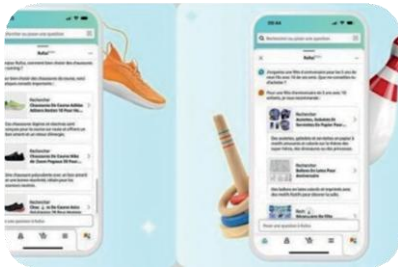
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"Our new concepts bridge the gap between physical experiences and digital logic."

"We have reduced the sales area to create immersive spaces, with a video link to an advisor."

→ AI, the new in-store sales advisor



Amazon's Rufus is an intelligent shopping assistant, powered by AI and trained from Amazon's product catalog. Not only does it respond to keywords, but directly to the questions asked by customers. Product comparison, personalized recommendations, detailed explanations about a product, etc. It aims to respond like a genuine personal sales advisor, and will improve over time.



When customers scan an item in a **Nike** store, they unlock exclusive design videos, styling recommendations, and special offers. This concept was launched in March 2025. The Nike app also lets users scan shoes to find their perfect size and access exclusive sneaker details.

→ Tech platforms enrich the physical world



Amazon has opened its first physical store in Italy, "Amazon ParaFarmacia & Beauty," in the heart of Milan. This new concept store, featuring a digitalized customer journey and designed by Inovshop, combines a wide selection of beauty and personal care products with innovative services and expert advice. The store is equipped with "Place & Learn" stations with interactive screens that broadcast explanatory videos about the products when they are placed on the display.



In 2025, **Netflix** will open its first two "Netflix Houses" in Dallas and King of Prussia. These immersive phygital spaces will blend physical sets, interactive technologies, and augmented reality experiences to immerse visitors in the worlds of cult series like Squid Game, Bridgerton, and Stranger Things.

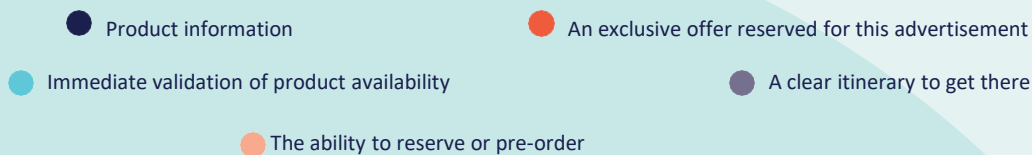
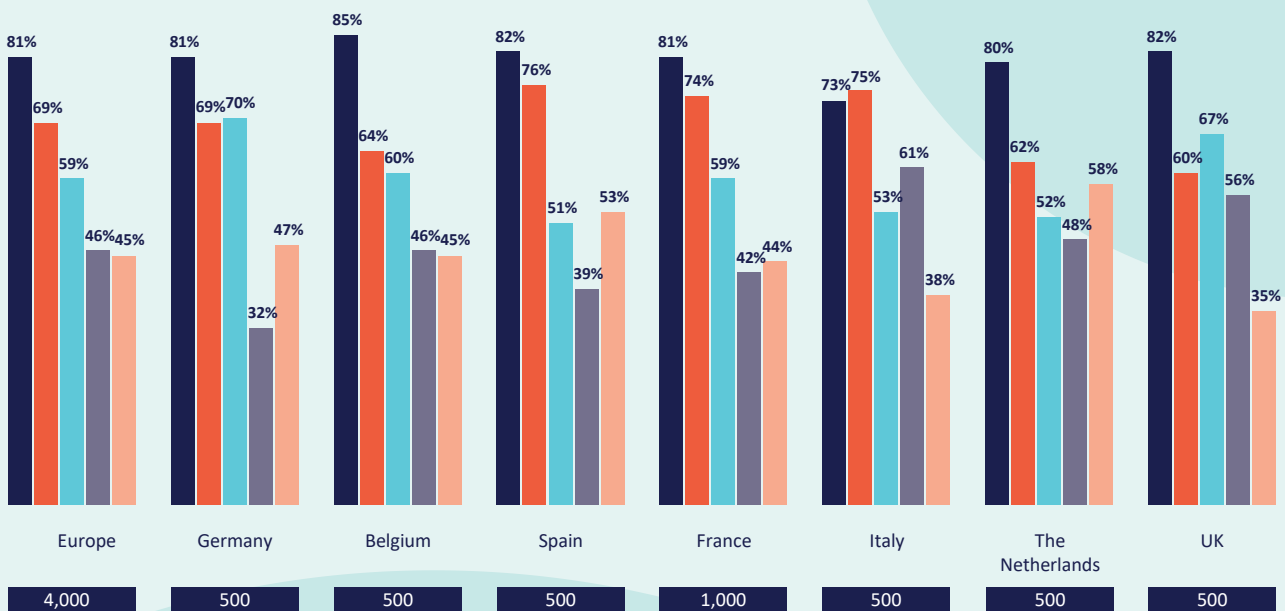
Survey conducted from
January 8 to 17, 2025,
among **4,000** European
respondents

Quantitative Focus

B2C

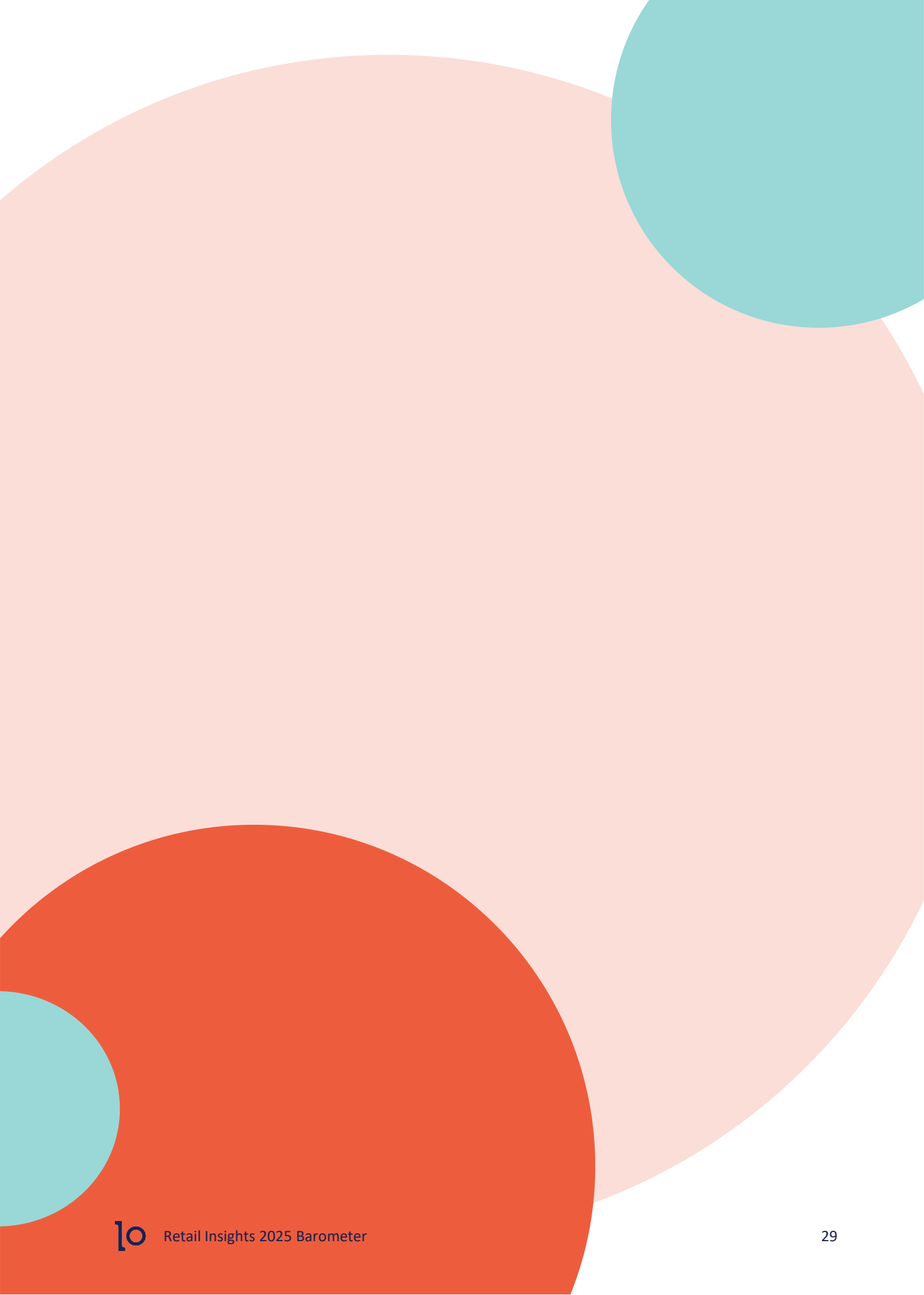
→ When it comes to smartphone advertising, what do you expect first and foremost?

81% of Europeans primarily expect mobile ads to provide product information, exclusive offers available only through these ads (69%), and confirmation of product availability (59%).



Expectations vary by country:

- Product information is a higher priority in Belgium, but a little less so in Italy.
- An exclusive offer is more popular in Italy, France, and Spain but generates less interest in the Netherlands and the UK.
- Availability confirmation is a higher priority in Germany and the UK, but less so in other countries.
- A clear itinerary is more of a priority in Italy and the UK but less so in other countries.
- The ability to reserve or pre-order is more sought after in Spain and the Netherlands, while it is less expected in Italy and the UK.





7. Hyper-personalization becomes reality

The use of AI for personalization increases **conversion rates by 20 to 30%**

AI transforms the customer experience into an essential performance lever. Thanks to machine learning, brands now have tools to finely decode each consumer's expectations, behaviors, and preferences in real time. This hyper-personalization, already successfully implemented by platforms like Spotify and Netflix, drives record engagement rates (sometimes exceeding 30%) by tailoring each piece of content or advertising to the individual.

The result: smoother, more relevant and above all greater performance, with a direct impact on conversions and ROI.

Beyond visual personalization, a new generation of immersive experiences is emerging: adaptive interfaces, contextual recommendations, spontaneous interactions, etc. Brands no longer just interact with their audiences: they integrate into their daily lives.

In this new ecosystem shaped by AI giants, brands that know how to leverage data to build trust will become the leaders in their category.

Qualitative Focus

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Interviews conducted in March 2025.

"AI will make it possible to push the right offers at the right time, to the right customer."

More than 80% of executives plan to adopt AI-based automation tools by 2027.

Real-time data analysis opens up a new era of customer understanding

By capturing what draws attention, sparks interest, or drives purchase decisions, brands now have a 360-degree view of the customer journey, and with AI, recommendation systems are becoming true business accelerators. They facilitate product discovery, optimize cross-selling and upselling, and above all, enhance the relevance of interactions. Each customer is offered content, deals, and products tailored to their expectations, regardless of the channel or touchpoint.

This level of ultra-relevance is no longer reserved for digital giants: even luxury brands are investing heavily in AI to redefine their service standards.

The result: a natural fusion of physical and digital, perfectly aligned with the expectations of an ultra-connected, demanding Generation Z seeking added value.

This hyper-personalization nurtures loyalty: the customer feels recognized, understood, and valued. Whether shopping online or in-store, the experience is seamless, contextualized, and consistent. AI can even recognize a returning customer in-store to offer them a deal or service designed specifically for them.

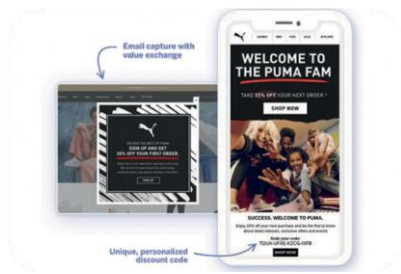
By leveraging past purchases, preferences, geolocation, or key life moments, brands can build highly targeted push campaigns.

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"CRM is becoming intelligent. We are moving away from one-size-fits-all."

→ Hyper-personalization boosts business performance



PUMA has implemented a strategy to centralize its data and deliver the right message to the right customer at the right time. Thanks to the SAP Emarsys Customer Engagement platform, the brand gained valuable insights into its customers' lifecycle and motivations. The results are impressive: in just six months, PUMA increased its email-driven revenue fivefold, boosted its open rate by 25%, grew its database by 50%, and increased its weekly subscriber count tenfold.

Blissim

Blissim leverages its customer base by combining retargeting with personalized messaging, primarily through CRM but also via WhatsApp and SMS. For example, six months after a purchase, the brand encourages customers to recommend the product, or otherwise, a customer who is sensitive to clean or skincare-oriented products, and less interested in makeup, will receive targeted communications based on their preferences.

→ AI and data accelerate the race to hyper-personalization



Hopla, Carrefour's intelligent assistant, not only makes online shopping easier by suggesting products that match selected recipes but also analyzes our tastes and fridge contents to help us plan our meals more easily.

TESCO

With its famous Clubcard, **Tesco** has transformed the loyalty program into a large-scale personalization tool. By analyzing shopping baskets and individual behaviors, the retailer offers highly targeted deals and personalized promotions directly linked to consumer habits.



In its push for hyper-personalization, **Walmart** has developed a content decision platform capable of creating tailored shopping experiences and anticipating the content each customer wants to see on the site. Ultimately, the ambition is clear: to offer each user a unique home page, as if the entrance to a store had been specially designed for them.



At HelloFresh Belgium, algorithms analyze food preferences, dietary restrictions (vegetarian, gluten-free, etc.), and purchase history to suggest weekly menus tailored to each household. This approach extends to communication, with personalized newsletters that take into account tastes, seasonality, available preparation time, and past behaviors.

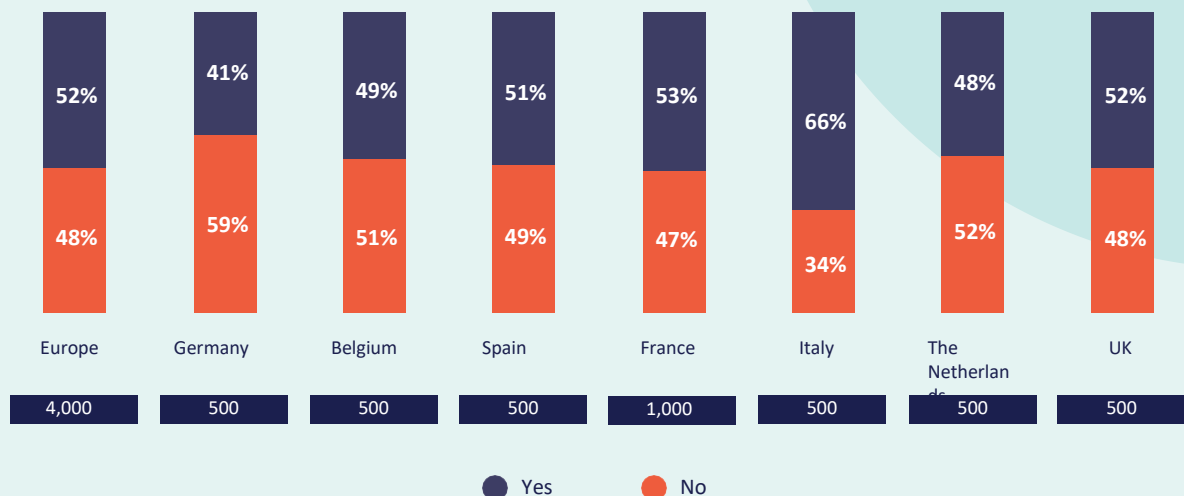
Quantitative Focus

B2C

Survey conducted from January 8 to 17, 2025, among **4,000 European respondents**

→ Are you more likely to buy from brands that personalize their customer relationships (for example, by considering your preferences, purchase history, or by sending you tailored communications)?

52% of Europeans say they are more likely to buy from brands that personalize their customer relationships. Consumers aged 18–24, 25–34, and couples with children are even more likely than average to say yes (64% and 66%, respectively). Conversely, those over 65 are less likely to share this idea with 59% saying no.



When it comes to personalized customer relations, this varies greatly by country. In Italy, consumers are particularly receptive to this approach. Conversely, in Germany, this strategy seems to be less popular. German consumers often prioritize factors such as price, product quality, and transparency, placing personalization second.



8. From macro to micro influence

Influence marketing represents a \$24 billion industry

Influence marketing is emerging as a major strategic lever. Today, **40% of marketers allocate a quarter of their budget to influencer campaigns**, a significant increase compared to previous years.

This development reflects a paradigm shift: creators are no longer mere communication relays, they now occupy more strategic roles. At the same time, brands are becoming aware of the need to forge deeper, more sustainable partnerships.

What is confirmed in 2025

The trends already observed will become more intense. Brands will continue to favor collaborations with niche influencers and micro-influencers, who often generate more authentic engagement than celebrities or macro-influencers.

Another powerful lever is User-Generated Content (UGC), content created by users, often amplified by influencers. In 2025, it will become essential, especially since **92% of buyers place greater trust in content created by their peers**. Finally, virtual influencers like Lil Miquela, already tested by some brands, will continue to gain ground. Their integration into marketing campaigns is expected to become widespread.

What is emerging in 2025

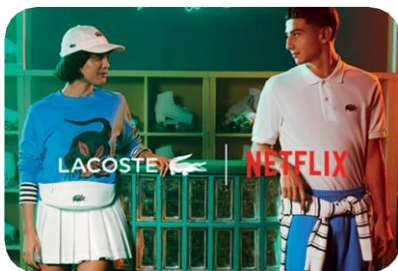
The experience offered by influencers is evolving: they guide their communities through virtual stores, conduct interactive demonstrations, and deliver personalized 3D experiences.

"Social commerce" will become a pillar of influence marketing. Platforms like TikTok Shop or Instagram Shopping are already redefining the shopping experience. Influencers will become direct sales drivers, especially through real-time product tags and interactive live streams. Finally, new platforms are emerging alongside the traditional giants and could significantly reshape the way brands, creators, and consumers interact.

→ Towards new forms of influence

More and more brands are partnering with influencers to bring ambitious advertising campaigns to life, designed as true storytelling epics. After Inoxtag's ascent of Everest, Ford is now embracing adventure with **Charge Around The Globe**, a narrative world tour led by Lexie Limitless.

The pitch? Reinventing modern exploration with an electric vehicle. The result: a mini-series streamed on YouTube and Amazon Prime, featuring American influencer and globetrotter Alexie Rose Alford, also known as Lexie Limitless, as she travels the world behind the wheel of the new all-electric Ford Explorer SUV. Content that is a mix of documentary, entertainment and brand storytelling.



To mark its 90th anniversary, **Lacoste** partnered with **Netflix** to launch an exclusive capsule collection inspired by four of the platform's iconic series: Lupin, Bridgerton, Sex Education, and Stranger Things. To promote this collaboration, the brand enlisted four international content creators: Michou, Madeleine, Nil, and Marcela, who together have a total following of 13 million. Each was immersed in the world of their favorite series, dressed in pieces from the collection.



Craftmix, a non-alcoholic cocktail brand, went viral on TikTok thanks to a video featuring its social media manager. Behind this success, Sarah Renn, the true face of the brand on the platform, regularly shares authentic, unfiltered behind-the-scenes content.

Qualitative Focus

Qualitative component with 10 in-depth interviews, including 5 members of the Executive Committee (COMEX). Interviews conducted in March 2025.

"Influence is about connection, storytelling, and embodiment. It goes beyond just a promo."

"Brands that perform are those that create a real customer relationship, even via networks."



On the morning of Valentine's Day, at the corner of Boulevard Haussmann and Rue Caumartin (Paris 9th arrondissement), the Room 14 pop-up store opened for a three-day run. This pop-up store is the result of a collaboration between **Zalando** and **Hôtel Mahfouf**, the brand of content creator **Lena Situations**. At the heart of this campaign was a capsule collection of 22 pieces and accessories, featuring an elegant gradient of reds, burgundies, and blacks. The color palette was designed to capture the spirit of Valentine's Day with daring style.

Yuma Labs focuses on meaning



Yuma Labs, a pioneering Belgian brand in circular fashion, designs glasses from recycled materials. To get its name out there, it relies on micro-influencers active in ethical fashion who fully share its values. Rather than focusing solely on the product, Yuma Labs is betting on authentic storytelling centered around the manufacturing process, environmental impact, and the mission that drives the brand.

Barilla combines influence with emotion



By collaborating with chefs, food influencers, and lifestyle creators, **Barilla** is moving away from traditional promotional formats in favor of longer, more emotional storytelling rooted in everyday life. A way to create multi-generational, authentic and deeply human campaigns.

Gymshark transforms its members into ambassadors



Gymshark, a British sportswear brand, made its mark by building a community of influencer-athletes, many of whom were unknown at the start of their careers. By supporting them over the long term and turning them into true brand ambassadors, the company has built strong, lasting relationships with these creators.



9. The price war is heating up

In 2025, inflation and price are the primary concern of retailers, and the global **low-cost market is expected to grow by 2.4%.**

Whatever the channel, store, marketplace or e-commerce, **price remains the decisive element** in the act of purchase. To protect their margins while responding to price pressure, 36% of retailers say they are adjusting their offer by including more discount products (BtoB study by Havas Commerce, 20+ countries). In an unstable environment, retailers are focusing on optimization: investing in IT systems, preventing stock shortages, and increasingly turning to AI. Automation, anticipation, prediction, etc. The players that integrate artificial intelligence intelligently into their models will be the ones who come out on top. For retailers and consumers alike, saving time and money will remain a lasting priority.

In a context of **price wars and strained consumer spending**, the global low-cost market is expected to see positive growth in 2025, supported by favorable economic conditions.

In 2024, Action posted a 21.7% increase in net sales



According to the brand, this growth is driven solely by increased volume, highlighting the appeal of its model based on low prices and frequent product turnover. Fuelled by this success, **Action** has no plans to stop there and is preparing to expand into two new countries this year, continuing its international growth.

The French have increased their spending by 12% at Shein and 11% at Temu in one year.

What tools are needed to conquer the market?

Private labels: a strategic lever on the rise.

In recent years, private labels have experienced record success. Driven by growing demand for quality products at affordable prices, retailers have a real opportunity to strengthen or expand their ranges. These products offer a two-fold advantage: retaining customers and generating higher margins.

Retail media: a booming channel. Nearly half of consumers say they are influenced by sponsored products in search results. 30% regularly click on banners and 45% believe

that an advertisement on a distributor's website impacts them more than an ad on TV. A revenue and conversion lever that has become essential.

Internationalization and diversification: true growth drivers.

In response to the European slowdown, French companies can explore foreign markets to build sustainable growth drivers.

At the same time, diversification in products, services, or business models is modernizing brands and opening new horizons, as seen with Apple integrating hearing aid features into its AirPods.



To stay competitive, low-cost companies are focusing on technological innovation, operational efficiency, and digital platforms. But they will also have to face increased competition and economic uncertainties.

Brands that can combine adaptability, sustainability and attractive prices will come out on top.



Intermarché is now targeting a 40% market share for its private label products by the end of 2026, up from 35.3%. This represents an additional €2 billion in turnover growth. The coming months will see the launch of 350 new products, including items that were previously manufactured by national brands. 1,400 new products will be available in September 2025.

→ The price war



Auchan unveils its new slogan: "Auchan. The choice, the right one". Through this promise, the brand is reaffirming its core values: offering a wide and accessible range without compromising on price. A strong positioning in a challenging economic context, where purchasing power remains more than ever at the heart of French consumers' concerns.



In response to soaring inflation in the UK, **Iceland Foods** has openly committed to supporting low-income families and vulnerable groups. The brand has frozen the prices of more than 1,000 essential products, while launching targeted offers for seniors and struggling families. To go further, it has introduced a low-cost private label and strengthened its loyalty program with the "Bonus Card," which offers immediate discounts.



Dutch retailer **Wibra** is continuing its growth by dipping its toe into the French market. On October 23, 2024, it opened its very first store in Lambersart, near Lille. Specializing in everyday products, home décor, and textiles, Wibra attracts customers with its ultra-competitive prices, with most items priced between 1 and 5 euros. But beyond pricing, it also focuses on the in-store experience, with well-designed, pleasant retail spaces created to offer a smooth and engaging shopping visit.

→ Masterstroke or marketing move?



Lidl, a fashion icon? After its unexpected success with sneakers, the brand is now moving into the dress shoe market. The brand is preparing to launch pumps in its colors (yellow, blue, and red). These pairs will be sold in stores at a price of 12.99 euros from February 6, 2025.



Budget-conscious American consumers looking for alternatives to luxury goods are flocking to a leather bag from **Walmart** that closely resembles the Hermès Birkin, nicknamed the "Wirkin." It is available on the Walmart website and is a more affordable version of the famous Hermès Birkin bag.

Survey conducted from
January 8 to 17, 2025,
among **4,000 European**
respondents

Quantitative Focus

B2C

→ In general, do you pay more attention to prices, promotions, good deals, etc.?

In an economic climate shaped by inflation and uncertainty, European consumers are becoming more mindful of their spending. Young people and singles are even more likely than the European average to monitor prices.

93% of Europeans say they pay more attention to prices, promotions and good deals. 18-24 year olds and singles pay the most attention (95%).

77% of European respondents say they are increasingly adopting a budget-restriction mindset, with 31% doing so always and 46% often.

Qualitative Focus

Qualitative component with 10 in-depth interviews, including 5 members of the Executive Committee (COMEX). Interviews conducted in March 2025.

"As with all retailers, there is a lot of pressure regarding pricing. Price competitiveness is once again at the core of the business. It always has been, but for a while the focus had shifted somewhat toward quality. Now we're making a strong shift back to price and, of course, focusing on value for money."

"We're developing entry-level products to remain accessible without resorting to heavy discounting."

"We need to give clear price benchmarks, without necessarily sacrificing the margin."



10. Loyalty programs: a band-aid solution to inflation

The purchasing power crisis is calling **customer loyalty models into question**

In 2025, the best companies already know that a good loyalty program goes beyond mere rewards. It builds a long-term relationship by encouraging customer engagement across all channels.

According to Forrester's predictions on B2C marketing and customer experience, price sensitivity is expected to drive a 25% drop in brand loyalty, making loyalty-building efforts more essential than ever.

Loyalty programs are undergoing a major shift with the rise of digital solutions, especially through mobile wallets.

→ Programs will evolve towards more personalization with the increased use of AI, big data, and gamification.

→ Companies will seek to offer more targeted rewards, personalized offers in real time, and exclusive experiences to strengthen their customers' engagement.

86% of consumers are willing to try a new brand because it offers a discount.

80% of consumers subscribe to promotional emails to receive digital coupons

Online shoppers around the world are expected to use 700 million coupons in 2025.

The digitalization of coupons is accelerating, with consumers favoring digital offers for their convenience.

→ A recent study (2024) shows that 57% of consumers prefer digital coupons over paper ones, highlighting the convenience and accessibility offered by digital solutions.

→ Statistics on QR codes show a 323% increase in their use between 2021 and 2024, with more than 5.3 billion QR code-based coupons used in 2024.

In 2023, the global digital coupon market was valued at 7.57 billion dollars and is expected to reach 34.46 billion dollars by 2032, representing a 4.5-fold increase.



The new loyalty program from **Maisons du Monde** goes beyond simple transactional benefits. It offers a personalized, emotional experience focused on customer closeness. Co-created with customers, "Ma Maison du Monde" is structured around three tiers: Likers (€0–199), Lovers (€200–999), and Addicts (€1,000 and above). Each tier offers access to exclusive perks such as "My Privilege Shopping Day," "My Privilege Delivery," and "My Privilege Birthday."

→ Loyalty programs are becoming experiential



The North Face is taking the same approach as Adidas or Nike by offering an innovative loyalty program, aligned with the brand's lifestyle. The "XPLR Pass" is not just an incentive to spend more; it's an invitation to explore, strengthening brand engagement among its users.

You can earn points through purchases, but also by participating in events or downloading the app. The rewards are definitely off the beaten track: experiences with athletes, mountain outings and exclusive access to collections.

Subscription e-commerce is expected to double **by 2029**

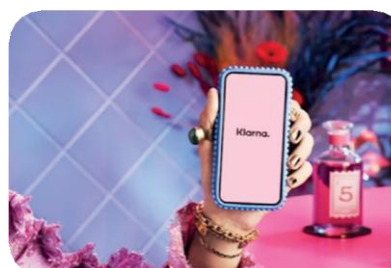
Subscriptions are an effective way to lower prices for consumers, while ensuring recurring revenue for businesses. In exchange for regular engagement, customers often benefit from attractive discounts, exclusive services or a more seamless and personalized experience.



Since mid-January, the **La Redoute+** formula has been available in Switzerland. Over the course of 2025, the subscription will be rolled out in Belgium, the Netherlands, Spain, Portugal, Germany, and Italy. The subscription entitles you to free and unlimited delivery of all products, and exclusive price benefits will also be offered.

"Buy Now, Pay Later" **is becoming widespread**

The main attraction of BNPL is its simplicity: it allows consumers to buy items instantly and split payments over time, often interest-free. This feature has made the system especially appealing to younger generations, who are increasingly turning away from traditional credit cards due to high interest rates and concerns about long-term debt.



Uplift, "Buy Now, Pay Later" (BNPL) solution, stands out by specializing in travel financing. The fintech company has partnered with several airlines, travel agencies, and tourism platforms to offer consumers flexible payment plans for flights, stays, and vacations. Thanks to these partnerships, travelers can book their next trip by staggering their payment over several months.

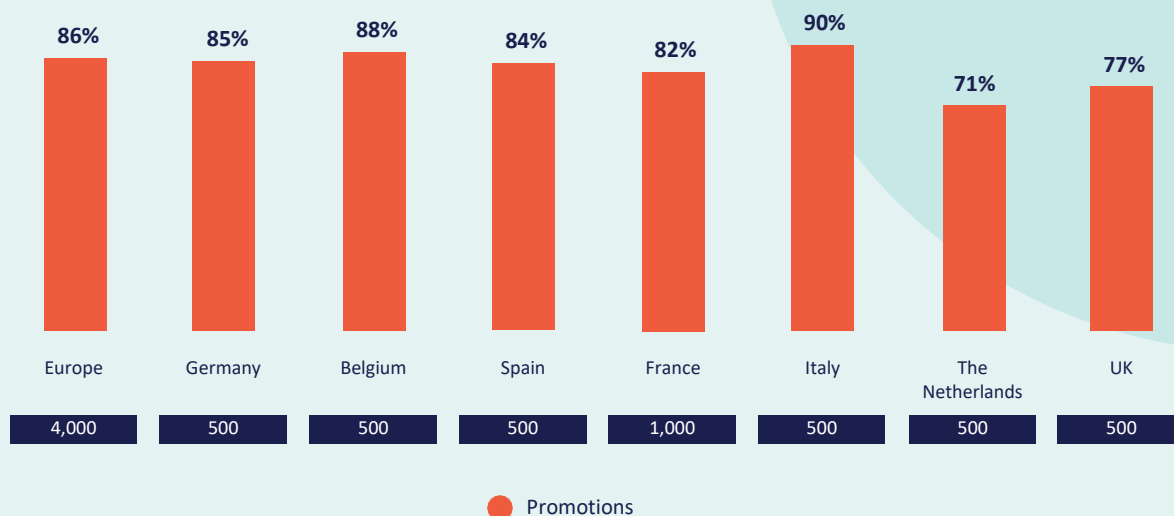
Survey conducted from
January 8 to 17, 2025,
among **4,000 European**
respondents

Quantitative Focus

B2C

→ Would you say that you make more use of...?

86% of Europeans say they make more use of promotions. This trend is particularly pronounced in Italy (90%) but remains stable at the European level compared to 2024. Spain and the United Kingdom show the largest decrease compared to 2024 (-7% for both countries).



Qualitative Focus

Qualitative component with 10 in-depth interviews, including 5 members of the Executive Committee (COMEX). Interviews conducted in March 2025.

"We're thinking about how to build loyalty without spending too much money. That's the challenge for everyone, since loyalty programs still require significant resources. For example, there are many new types of loyalty programs that don't necessarily rely on point accumulation. We're exploring those options."

"We already have a classic PRM approach for our cardholders, but going forward we're moving toward ultra-personalization of our loyalty program."



11. Sustainability is now a business imperative

Companies must accelerate their ecological and social transition **to remain competitive**

The adoption of the mandatory Corporate Sustainability Reporting Directive (CSRD), increased transparency on environmental practices, and the acceleration of the energy transition require retailers to heavily integrate decarbonization and sustainable resource management into their value chains.

These new standards are pushing the sector to reduce its carbon footprint, optimize waste management and strengthen social ethics in procurement processes.

At the same time, impact-driven companies are increasingly adopting B Corp certification, which has become a key benchmark. It is the only one that measures the entire

social and environmental performance of a company.

Responsible artificial intelligence, biodiversity, and green technologies are becoming investment priorities for companies. AI and blockchain play a key role in improving traceability and transparency in supply chains, ensuring compliance with environmental and social standards while giving consumers better visibility into the impact of the products they buy.

9,400 companies
B Corp-certified worldwide in
January 2025, including 500
in France.

Retail and CSR in 2025: managing **regulatory and budgetary** challenges

Economic uncertainty, cost pressures, and competitive challenges sometimes make it difficult to allocate sufficient resources to these initiatives.

→ 43% of business leaders plan to invest in CSR in 2024, down from more than 50% at the end of 2023, reflecting increased caution in the face of economic uncertainty.

→ Business failures have reached record levels, especially among SMEs, exacerbating pressures on cash flow and investment capacity.

→ 50% of companies honor their payments on time, while the extension of payment deadlines, reaching almost 13 days, puts pressure on cash flow.



Belco, a company involved in the importation of coffee and cocoa, is accelerating its transition to low-carbon maritime transport. As the financial partner of TOWT (TransOceanic Wind Transport) and exclusive coffee charterer, Belco has a strong ambition: to achieve 100% sail-powered sourcing by 2030.

Nevertheless, brands that manage to combine profitability and responsibility position themselves as key players, able to meet new societal expectations and ensure sustainable long-term growth.



LA POSTE

La Poste, through **Colissimo**, confirmed its support at the end of 2024 for the commitment charter aimed at reducing the environmental impact of online commerce, promoted by the Ministry of Ecological Transition. This update to the charter, developed collaboratively with volunteer companies as well as Fevad and Ademe, strengthens recommendations around responsible practices.

Towards **more sustainable** logistics

Environmental and social issues are at the heart of the debate, and the supply chain has a major role to play. It is already under pressure from different directions:

→ New regulations that will only become stricter.

→ Customers looking for more committed suppliers and transparency.

→ Consumers who can access information in just a few clicks.

ESG, a concept related to CSR, refers to a set of criteria that assess the environmental, social and governance performance of a company. For many sectors, most of the ESG footprint

lies within the management of its supply chain.

The use of AI to facilitate more sustainable supply chains could become standard in the industry.

IoT (Internet of Things) plays a key role in managing the supply chain and fighting waste. This technology can track products in real time, identify their origin, trace their journey, ensure compliance with the cold chain required for preservation, etc. IoT also helps optimize inventory by preventing stockouts or overstocking. This is especially beneficial for managing unsold non-food items, which it has been prohibited to destroy since 2022.



Inclusive marketing is no longer a mere trend, rather it is becoming a social and ethical necessity and a moral imperative for brands. Consumers, especially younger generations, expect companies to actively engage in concrete actions on inclusivity. This goes beyond positive communication, instead concerning tangible commitments to diversity and social responsibility.



In June 2024, **Amazon** took a key step in its environmental strategy by announcing the removal of 95% of plastic air cushions from its packages in North America. This initiative is part of a broader approach to reducing plastic waste and optimizing packaging. To replace these single-use plastic protections, the company is relying on recyclable materials, in particular FSC (Forest Stewardship Council) certified paper and cardboard.



Having long been committed to more responsible cosmetics, **The Body Shop** is accelerating its sustainable transformation in the UK. The brand is rolling out refill stations for shampoos and shower gels in a growing number of stores, encouraging customers to reuse their containers rather than buy new ones.



Iper La Grande makes zero waste a priority in its stores. The brand has set up bulk corners for foodstuffs and household products, and it also offers a deposit system for certain glass bottles. Finally, each point of sale is equipped with dedicated sorting areas. An Italian-style vision of responsible business, rooted in everyday life.



L'Oréal Luxe offers multi-brand refillable fountains at **Sephora**, reducing single-use packaging.

→ Second-hand goods are making their way onto the shelves



Alltricks, the bicycle specialist owned by Decathlon, has just unveiled its key figures for the year 2024. The company's turnover, including Alltricks and Troc Vélo, reached 240 million euros, up from 228 million euros in 2023, representing a 5.2% increase. This growth is driven by the expansion of refurbished products.

→ Recycling is becoming widespread



Currys, a technology products company, is partnering with Deloitte to encourage technology recycling. The accounting firm encourages its employees to take advantage of Currys' Cash for Trash and Takeback initiatives. The retailer will then send part of the collected technology to Deloitte for potential reuse, so it can be donated through its device donation program.



A Belgian pioneer in ecological cleaning, the Malle-based company **Ecover** has set up in-store refill stations for its detergents and dishwashing products, thus considerably reducing the use of single-use packaging. Its bottles are made of 100% recycled and fully recyclable plastic, in a logic of circularity, and its factory is certified "zero waste".

→ Towards more inclusive and ethical consumption



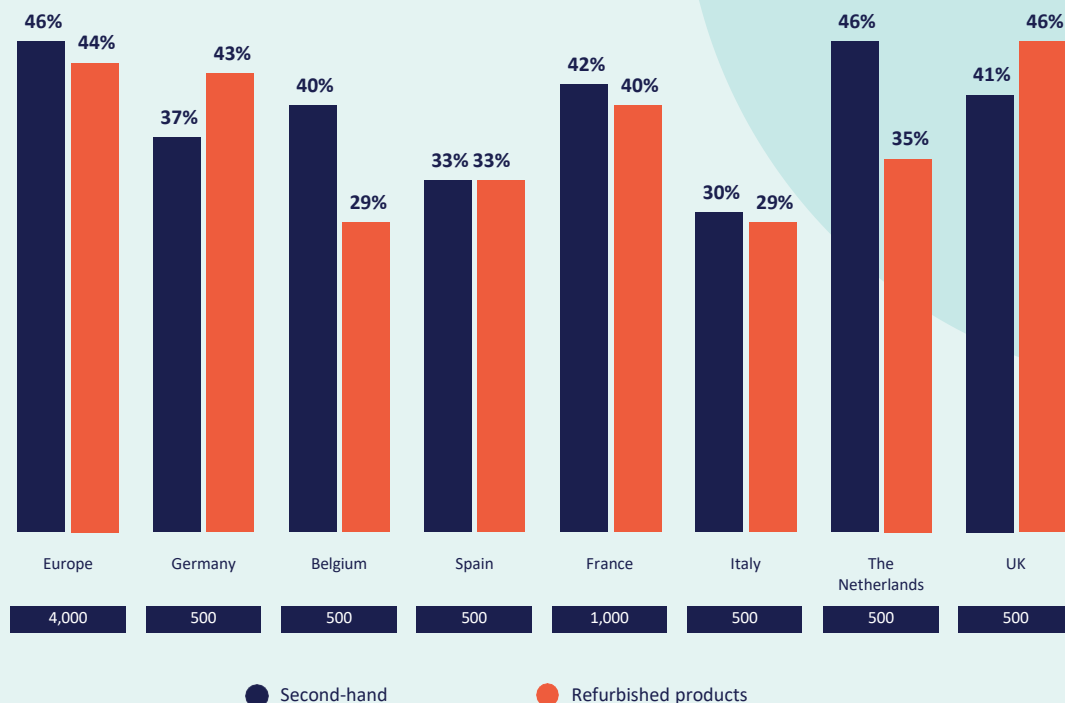
German dairy producer **Hochland Group** will collaborate with the Belgian-Dutch startup Those Vegan Cowboys to develop and market animal-free cheeses. Hochland, with a turnover of 2.25 billion euros and an annual production of over 400,000 cheeses, is the first major cheese producer to begin using microbial casein on a large scale.

Quantitative Focus

B2C

→ Would you say that you make more use of...?

46% of Europeans say they make more use of second-hand products (vs. 51% in 2024) and 44% make more use of refurbished products (vs. 47% in 2024). This trend is part of a context where environmental awareness and economic concerns are increasingly influencing purchasing decisions.



Qualitative Focus

Qualitative component with 10 in-depth interviews, including 5 members of the Executive Committee (COMEX). Interviews conducted in March 2025.

"I'm not saying that CSR is dead, but it has taken on absurd proportions. Everything has to be CSR today. It has become very administrative, very bureaucratic. I think we will return to a more sincere, less dogmatic CSR. The role of CSR also involves defending citizens. We are moving towards a rebalancing. It's not the end, but it will be less fashionable."

"So, the context is a customer who is more knowledgeable, who increasingly understands CSR issues and in particular the way in which products are manufactured."



12. The awexperience at the heart of the physical store

85% of consumers want to enjoy sensorial experiences

Globally, there has been a clear trend towards opening physical stores in 2024. This indicates a revival of interest in points of sale at a time when online commerce is growing. Ikea, Etam, and even King Jouet are all major brands that are increasingly investing in these spaces, which now combine technology and human experience.

worldwide: 85% of shoppers praise the ability of physical stores to engage all the senses.

Mobile apps for both customers and sellers also enhance this reinvention, enabling smarter interaction between the customer and the physical space, easing purchases, and boosting engagement.

The phygitalization of stores makes them spaces transformed into immersive places, offering consumers a unique tactile and emotional experience. AI offers even more possibilities for experiences with virtual reality and personalization.

Retailers are focusing on "awexperiences," immersive experiences designed to surprise and attract customers. This desire for multisensory stimulation is confirmed by consumers

Experts predict the **return of** retail spaces in the form of concept stores focused on the customer experience.

Slow retail puts people back at the center of the experience

Far from the impersonal digital interfaces common in New York, these new spaces all share one thing: they are relatively low-tech. Another point is that there is a lot of work on the merchandising side to create very striking atmospheres. These spaces are no longer purely transactional but have become places for meeting, sharing, and immersing in the brand's universe.

To respond to this desire for authenticity, brands are adopting new formats such as cafes, product-free stores, exclusive events, etc.

Pop-up stores, the site of fleeting experiences, are becoming more widespread and are conducive to new concepts such as slow retail.

→ Temporary spaces or pop-up stores generate up to 80 billion dollars in annual revenue. Projections estimate that the value of the market will exceed \$95 billion in 2025.

→ A pop-up store typically operates for between 3 and 14 days.

→ 80% of retailers who have opened a pop-up store consider it a success, and 58% plan to open another one.

→ 44% of pop-up stores cost less than \$5,000 to open.

Qualitative Focus

Qualitative component with 10 in-depth interviews, including 5 members of the Executive Committee (COMEX). Interviews conducted in March 2025.

"We are rekindling the magic of the point of sale. It becomes a living space, not just a pick-up point."

"The customer experience involves guidance, clarity, and product showcasing."

→ The physical store reinvents the customer experience



ZEB, the multi-brand fashion chain with over 80 stores across Belgium and Luxembourg, has successfully bounced back by transforming its physical outlets into truly experiential venues. Far from just a clothing section, each ZEB store is designed as a stylized living space featuring curated collections, textile customization areas, and sometimes even DJ sets or local events to strengthen community ties.



With a £20 million investment, the **Future Stores location at 95 Oxford Street** aims to make shopping a truly interactive experience. It invites brands to seamlessly blend storytelling and immersive experiences on an extraordinary canvas and, with the opening of additional sites in 2025, to be part of a true global retail media network.



A symbol of Italian retail, **Rinascente** has redesigned its Milan flagship as a 360-degree lifestyle space: fashion, design, food, beauty, and cultural events come together in a seamless and immersive journey.

The brand focuses on exclusive corners, artistic installations, and constantly rotating pop-ups to generate surprise.



Aligned with an omnichannel approach, the **Levi's** store serves both as an immersive brand experience and a service point for collecting, returning, or exchanging items purchased online. Personalization also plays a key role, with a virtual customization and repair workshop called The Tailor Shop located within the store.

→ "The awexperience": a lever for suprising customers



London perfumer **Jo Malone** is opening a new boutique in Paris. Located in the heart of the Marais, this new address combines sophistication, art and sensorial experience. The Victorian architecture inspired by London townhouses is a nod to the brand's origins. Inside, everything is designed to dazzle visitors, starting with floral panels that celebrate the ingredients in the fragrances. The customer experience is also well thought out, with the possibility of receiving tailor-made fragrance advice, as well as the option of personalizing your fragrance.



Kim Kardashian 's first brand store opened in New York in December 2024. Rather than a vast empty space of over 600 square meters, the stylist created different cozy areas on each floor to ensure the neutrality doesn't feel sterile.

→ Concept stores appeal to all sectors



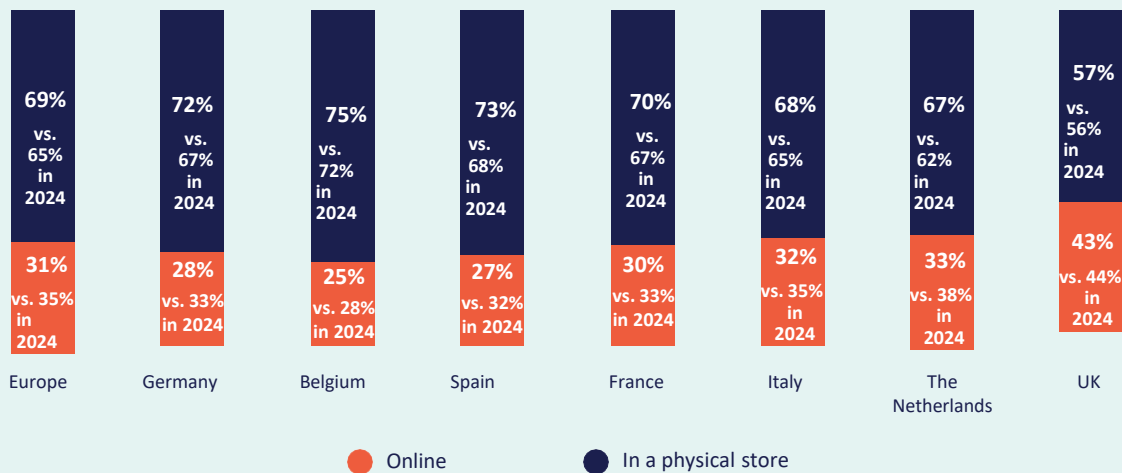
In November 2024, **Teflar**, a fashion brand founded in 2005 in New York, opened its first store in Soho. Its manifesto? Customers are the stars! This is reflected in the store's layout. In-store cameras periodically film the interior, displaying these live images on large screens.

Quantitative Focus

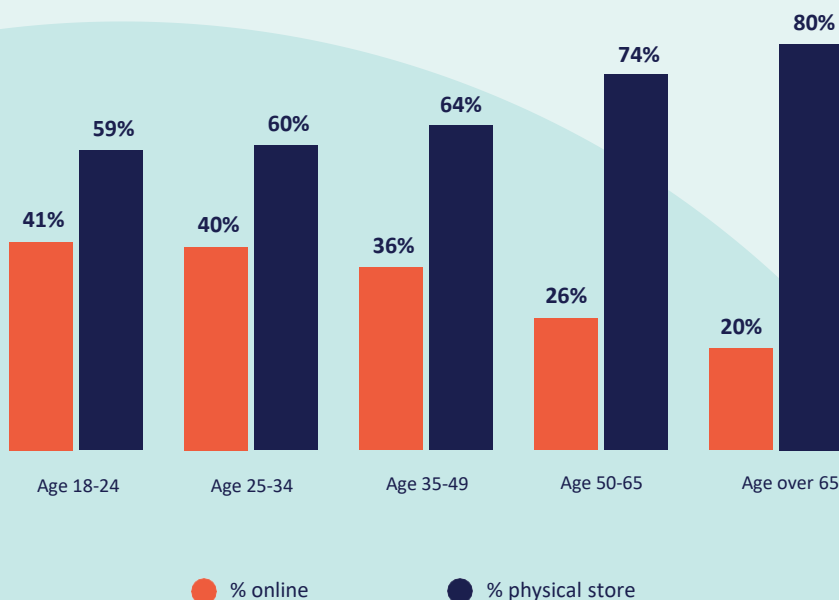
B2C

→ Today, your purchases are mainly made...?

69% of Europeans say they shop mainly in physical stores (+4% vs. 2024). This trend is particularly pronounced in the Netherlands, Germany, and Spain (up 5% vs. 2024).



The majority of purchases are still made at physical points of sale, even among the youngest generations.



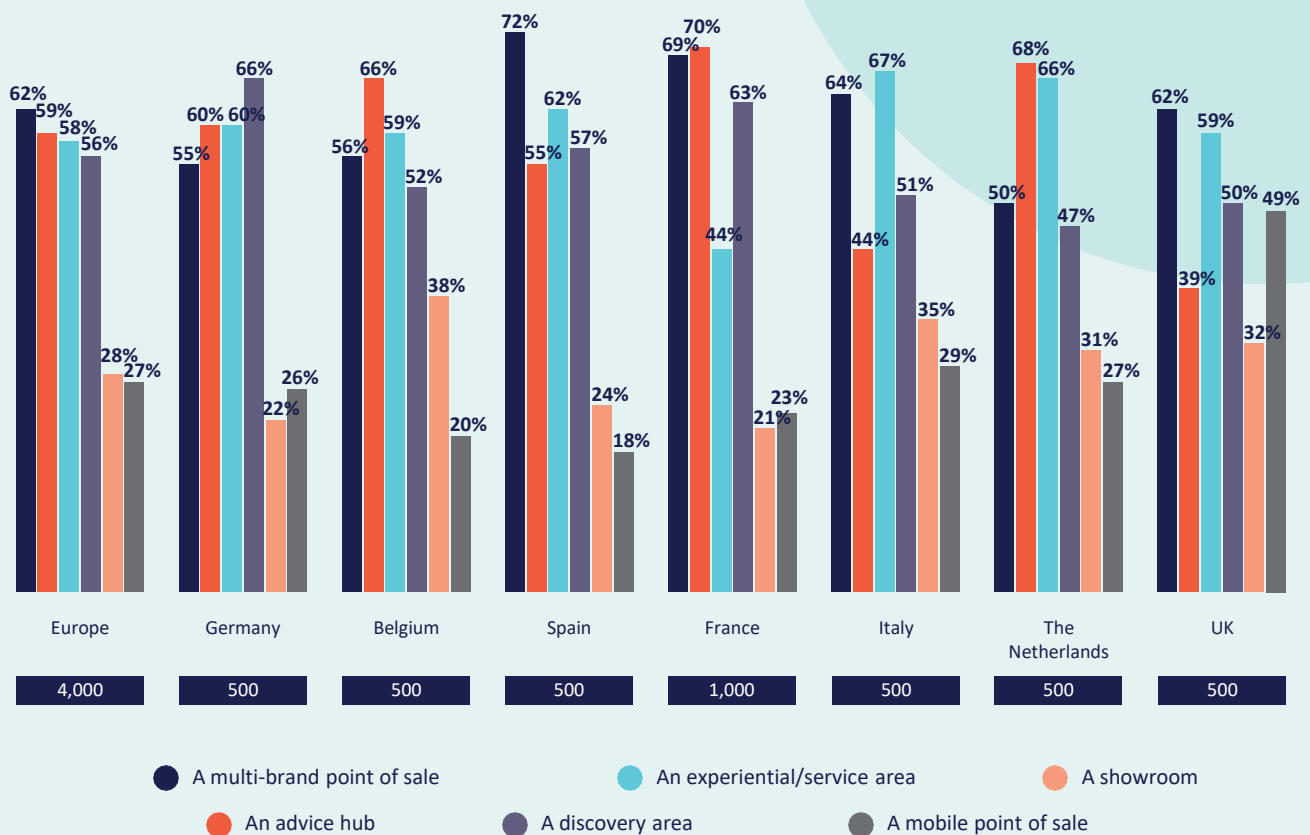
However, online shopping is much more popular among 18-49 year olds, where it is twice as popular as among 50 year olds and over. This trend reflects an interesting flexibility in shopping habits, with younger generations naturally incorporating e-commerce into their routines without abandoning physical stores.

Quantitative Focus

B2C

→ Tomorrow's point of sale is above all...?

For 62% of Europeans, tomorrow's retail store will primarily be a multi-brand space, followed by an advice hub (59%) and an experiential/service location (58%). 69% of 65+ year olds believe that the future is multi-brand, compared to only 51% of 18-24 year olds. This age group emphasizes the importance advice hub (62%) and discovery area (61%).



Depending on the countries studied, a multi-brand store is highly expected in Spain and France but generates less interest in the Netherlands, Germany, and Belgium. An advice space is more popular in France, but less so in Italy and Spain. An experience or service location is highly expected in Spain, Italy, and the Netherlands, but less so in France. A discovery space is more expected in Germany and France, but less so in Italy, the Netherlands, and the UK. A showroom is more popular in Belgium and Italy, but less so in France. A mobile point of sale is more popular in the UK.



13. Convenience stores are on the rise

Convenience stores, a **reservoir of retail growth**

According to NielsenIQ (2024), physical retail has seen volume sales increase in rural areas, making it an exception to the general downturn. In terms of value, it also took the top spot for sales growth, ranking just behind e-commerce, whereas all other channels declined. Philippe Palazzi, CEO of the Casino Group, is convinced that close, human-centered retail still holds significant growth potential.

According to some experts, retail faces a fundamental challenge in marketing and performance: how to do better with less? The answer: go back to basics, focus on the local, and stay close to the ground.

Speaking at the local level has become essential today.

Convenience stores are a relevant and growing market for large food distributors. Because they respond to different purchasing behavior, they perfectly complement larger supermarkets.

→ 85% of French people prefer to buy in convenience stores according to MasterCard.

→ 53% of French people are looking for local products (Opinion Way for Faire).

In general, consumers want more **personalization** and **closeness**.

2025 will be the year of **hyperlocal** and **responsible** commerce

Hyperlocal commerce is expected to continue to grow, driven by a growing demand for local and sustainable products.

Consumers, increasingly concerned about the origin and environmental impact of their purchases, will favor short supply chains and responsible brands. This trend, which has already been growing strongly in recent years, is expected to become firmly rooted in consumer habits.

Local products have gained in popularity, with sales growth of 25% in recent years in some countries. Online sales of local products have also increased, with nearly 30% growth in some markets in 2024.

→ In Île-de-France, there has been a growth of more than 20% in sales of local products over the last two years. Farmers' markets, AMAPs (Associations for the Preservation of Small-Scale Farming), and local grocery stores benefit from this trend, as residents of the Paris region seek to prioritize short supply chains and more sustainable consumption.

→ In the United States, sales of local products have risen by more than 25% in recent years, with a strong demand for fresh products and artisanal foods.

→ In Europe, sales of local products are experiencing similar growth, with increases of over 20% in several countries, especially Germany and the UK.



Déathlon City is launching in Nantes with a compact, strategic format designed to get closer to urban consumers while offering a smooth, digitalized shopping experience. Designed to fit into the heart of cities, this concept aims to meet new customer expectations by combining affordability, convenience, and innovation.



A sensation in New York, where **Whole Foods Market** opened a new store concept in early 2025 in the Upper East Side neighborhood. This new concept from the Whole Foods Market brand, called Daily Shop, offers a downsized version of the Whole Foods hypermarket experience. The concept is designed for quick shopping trips and last-minute errands.



The "**Potager City**" brand, launched by Carrefour two years ago, aims to open 10 to 15 new stores in 2025, bringing its total to 30 locations. At this rate, Potager City could have a hundred points of sale in three years. Through this new format, Carrefour Proximité intends to prioritize flavor with a wide variety of products, as well as ultra-fresh items and short supply chains through direct purchases from producers.



With the acquisition of **Delfood**, **Delhaize** is launching a fierce battle for convenience store customers. Many Delhaize stores are located in busy places, in cities, at gas stations, in train stations, and even at the airport. There is strong growth potential for the brand.



Prosol's second **Mon Marché.fr** store opened in January 2025. It is not in Paris itself (it is located in Puteaux) but marks the real beginning of Prosol's Parisian adventure (the host of Grand Frais) after the test conducted on Rue Lecourbe.



Mr. Bricolage is launching a new brand, **Mr. Bricolage Relais**. Since March 2025, forty stores have switched to this new model. "With Mr. Bricolage Relais, we will strengthen our presence across the country and bring our local expertise to as many French people as possible," says Christophe Mistou, CEO of the Group.



Gymshark opened a pop-up store at the end of 2024 and is preparing to open its permanent flagship store in New York in 2025. The goal is to create a place where the community can get their favorite outfits and spend time.



Färm, a Belgian brand, embodies a new generation of urban organic stores focused on responsible, local, and artisanal consumption. Each point of sale partially adapts its offer to the specificities of its neighborhood, favoring local producers and artisans.



Rooted in a premium local approach, **Planet Organic** is expanding its presence in UK city centers by focusing on healthy, organic, and local products, sourced as much as possible through short supply chains. The brand appeals to an urban clientele seeking quality, transparency, and social responsibility.



With the roll-out of urban formats in the city centers of Rome, Milan, and Bologna, **NaturaSi** is adapting its national model to local expectations. By acting at the neighborhood level, NaturaSi creates a strong link with the local ecosystem, while maintaining its commitments to organic, respect for the land, and sustainability.

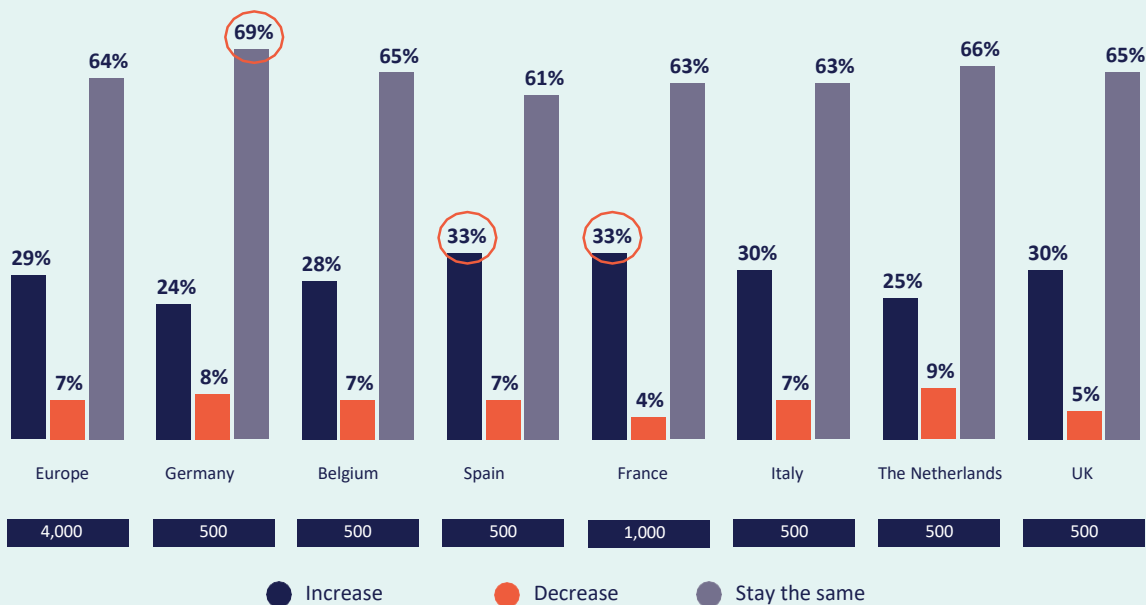
Quantitative Focus

B2C

Survey conducted from
January 8 to 17, 2025,
among **4,000 European**
respondents

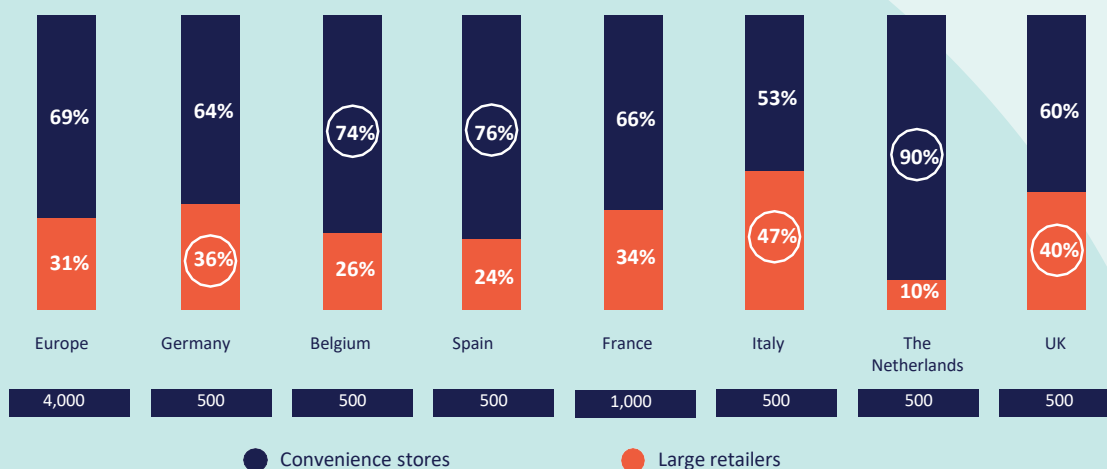
→ In the future, would you say that your consumption of local products (from your region) will...?

64% of Europeans say that their consumption of local products (from their region) will remain stable (vs. 60% in 2024). At the same time, 29% expect an increase in this consumption (vs. 36% in 2024), while 7% expect a drop (vs. 4% in 2024). These developments confirm that consumption will remain the same between 2024 and 2025.



→ Your consumption of local products will be more oriented towards...?

69% of Europeans say they will increasingly buy local products from convenience stores, compared to 31% who will favor large retailers. Compared to 2024, this is a reversal, as respondents then said 60% favored large retailers while 37% chose convenience stores.



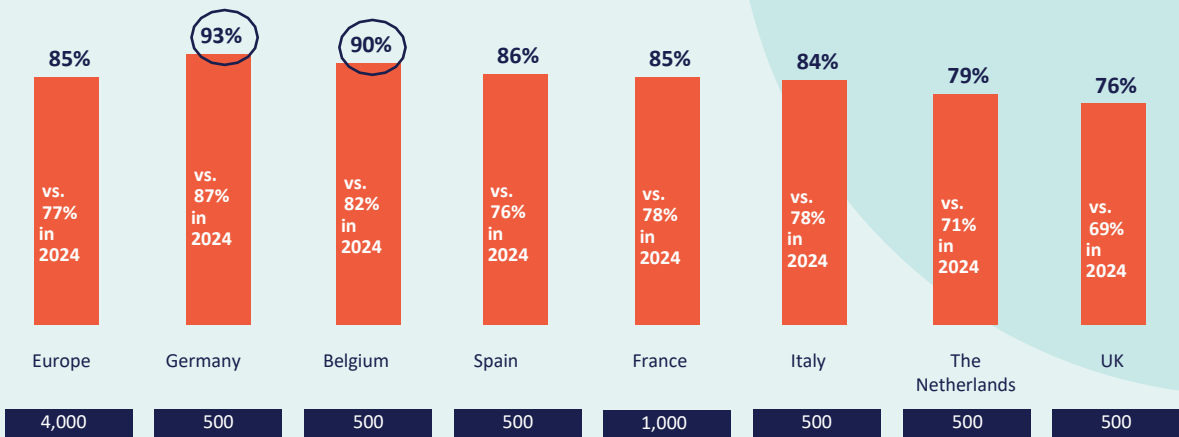
Quantitative Focus

B2C

Survey conducted from January 8 to 17, 2025, among 4,000 European respondents

→ What factor most influences you to go to a physical point of sale...?

For 85% of Europeans, proximity and affordability are the main factors that encourage them to go to a physical point of sale (vs. 77% in 2024). This factor is even more important among those aged 65 and over (92%).



Proximity and affordability are key factors in Germany and Belgium, but less so in the Netherlands and the UK. However, compared with 2024, this factor is gaining in popularity.

Qualitative Focus

Qualitative component with 10 in-depth interviews, including 5 members of the Executive Committee (COMEX). Interviews conducted in March 2025.

"Consumers are moving away from hypermarkets to convenience stores."

"Convenience stores are our key local lever."



14. Cybersecurity becomes a priority

Retail 4.0: new challenges in the face of **cybercrime**

Retail 4.0, characterized by the use of innovative technologies such as artificial intelligence, the Internet of Things, machine learning, and blockchain, increases operational efficiency and improves supply chain management but also exposes businesses increasingly to cybercrime.

To combat these security risks, companies in the sector must implement IT security policies, including data encryption, firewall use, adoption of reliable authentication protocols, staff training, and continuous system monitoring.

The retail sector is becoming an attractive target as companies collect large amounts of personal and financial data from their customers. This makes the sector particularly vulnerable to cyber threats such as malware, ransomware, DDoS attacks and credit card fraud.

Additionally, it is essential to develop a long-term cybersecurity strategy that includes risk analysis and the implementation of advanced technological solutions to protect their systems and customers.

It is crucial that companies in the sector invest in cutting-edge technologies and develop robust cybersecurity strategies to protect customer data and prevent fraud.

French companies suffer
44 cybersecurity
attacks per year.

A Fastly study of 200 IT and cybersecurity decision-makers highlights a systematic underestimation of the real impact of cyber attacks.

According to this new report, French companies take an average of 6.4 months to fully recover from a cybersecurity incident, which is 1.2 months longer than initially estimated, and the financial as well as operational consequences are significant.

According to a report by the Internet security company Keeper, on average, US companies suffered 42 cyberattacks in 2022. 15% of the 516 IT decision-makers surveyed said their company had lost more than \$500,000 as a result of successful cyberattacks, and 37% said that more than \$100,000 had been stolen.

→ Total losses due to online payment fraud worldwide between 2023 and 2027 are expected to exceed 343 billion dollars.

→ North America loses 2.4% of its e-commerce revenue due to payment fraud.

→ Latin America is the global region having suffered the most from payment fraud, with the region losing 4.2% of its revenues to fraudsters.

→ The figures are 3.1% and 2.9% respectively for the Europe and Asia-Pacific regions.

→ Information leaks are said to have cost more than 120 billion euros in France in 2024, compared to 90 billion euros the previous year.

Qualitative Focus

Qualitative component with 10 in-depth interviews, including 5 members of the Executive Committee (COMEX). Interviews conducted in March 2025.

"We are vigilant about AI tools, some of which are still uncertain in terms of security."

"The rise of digital requires a real framework of trust."

→ Cyberattacks put businesses at risk



Riding a wave of popularity, **Deepseek** is also attracting cybercriminals. The Chinese company that developed the AI of the same name announced on Monday, January 27, that it is temporarily limiting registrations to its service after suffering a cyberattack.



On October 21, 2024, **Free**'s database containing information on 19.2 million French customers was put up for auction by a hacker on a cybercriminal forum.



Aware of the rise of cyber threats, **Colruyt Group** has made cybersecurity a central pillar of its operational strategy. The brand has invested in strengthening its IT infrastructure with the goal of effectively protecting its data, customers, and partners. The group also focuses on ongoing employee training to reduce risks related to human error, which often causes security breaches. Finally, Colruyt works closely with external experts to conduct regular audits and identify potential vulnerabilities, aiming for continuous improvement.



Kiabi's second-hand site (secondemain.kiabi.com) was the target of a cyberattack. The site experienced a cyberattack on January 7, 2025, in the form of credential stuffing. This particular type of attack uses credentials from data leaks from other websites to attempt to access the targeted customer accounts. Cybercriminals were able to view and access personal data, including names, birthdates, contact details, and IBANs, for approximately 20,000 customer accounts.

→ Companies are arming themselves to protect against cyberattacks



Carrefour Group has called upon Armis solutions to better control and secure its information system. These solutions, used at the pop-up stores during the Paris 2024 Olympic and Paralympic Games, demonstrated their value and are now being adopted more broadly.



With **Wiz**, **Google** is making the largest acquisition in its history for 32 billion dollars. After an initial approach last summer, Google has acquired this cybersecurity startup. This American-Israeli start-up designs a cybersecurity model focused on the use of the cloud. This is by far the largest acquisition ever made by Google.



Coop Italia has made cybersecurity a strategic part of its digital transformation. The brand has set up a dedicated Security Operations Center (SOC) responsible for monitoring all systems in real time to detect any suspicious activity. Rapid response protocols have also been put in place to minimize the impact in the event of an incident. At the same time, Coop educates its customers about good online security practices, especially for payments, thereby strengthening trust in its digital services. A proactive and comprehensive approach that positions the cooperative as a responsible player in connected distribution.

Summary

Younger generations Y and Z, which make up a significant share of global consumption, strongly influence market trends. With them come new shopping habits and a new culture, directly reflected in the rise of M-Commerce and social shopping. Gamification and influence marketing also bear the mark of this new dominant digital culture.

Generations Y and Z also embody current contradictions, balancing rising demands for sustainability and transparency with a desire for low-cost products, even if they are less ethical. This is evidenced by the success of Shein and Temu.

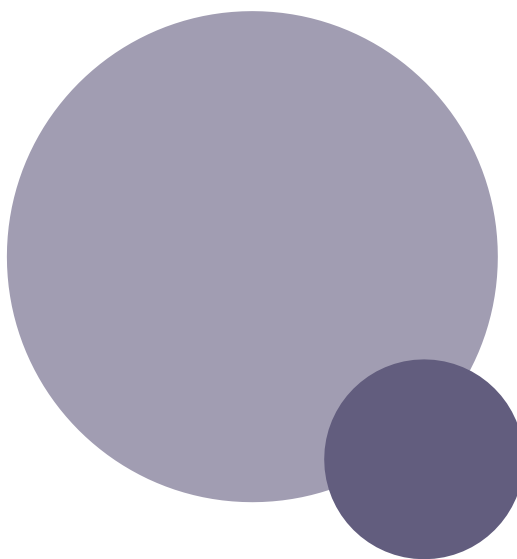
This pursuit of low prices takes place in a context where purchasing power remains generally limited.

E-commerce continues to expand, while physical stores regain strong added value by combining the best of direct contact with new technological possibilities.

Augmented reality and virtual reality enhanced by AI offer increasingly immersive and interactive experiences, providing more opportunities to build engaging customer relationships while gathering data. As a reflection and expression of the brand, the store becomes a space for experiences and entertainment, seamlessly integrating into blended shopping journeys.

Technological progress also generates new challenges. The collection and analysis of data remain subject to consumer consent and regulation. The increased use of new technologies once again raises the question of their ecological consequences.

Finally, and more urgently, the proliferation of technologies weakens system security, and companies must implement solutions to protect both themselves and their customers.



Notes

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