

# l'œil

de L'Observatoire Cetelem

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in depth study of new  
consumption trends

www.observatoirecetelem.com

## Blended and unpredictable: the retail model of tomorrow

To cater for the desire (or the need) to stand out from the competition or be seen in a new light, more and more retailers are combining their core offer with services that are sometimes unexpected. The era of hybrid retail is upon us.

### Seen in Paris, Louvain, Mexico and almost everywhere else

Mexico's latest Whole Foods supermarket features a meeting room for local community events, in addition to a bar and restaurant. In Louvain (Belgium), the Colruyt group offers cooking and yoga classes for expectant mothers, as well as wine tasting at its stores and, most recently, "educational birthday parties" at the Colruyt Group Academy (for a lesson on how to eat healthy, to learn about science, etc.). In Paris, every Franprix store now provides a few tables for its customers, together with a rotisserie area, coffee machines and orange juicers. Meanwhile, Picard is currently testing stores featuring a self-catering area equipped with a microwave oven, to enjoy the dishes purchased in the store. Both have drawn inspiration from the "feel-good" cafés/groceries that are riding today's tasty-and-healthy trend and multiplying fast around the world.



### What to think of it?

Whether it be supermarkets with a meeting room for local associations (a simple initiative that is easy to replicate), food stores that can be converted into tasting centres (a model that may be adopted by the catering trade in the future) or cafés that think they are grocer's shops (or is it the other way around?), **the assertion that food retail is trying to reinvent itself is something of an understatement.** The aim is not only to get closer to and friendlier with customers, but also to attract new populations that respond well to the blending of genres. Some are already talking about the rise of the "Grocerant" concept, a combination of the words "grocery" and "restaurant". In the retail sector, **reinventing oneself is as much about reinventing one's offering as it is about rethinking one's relationship with customers** and, more specifically, their own relationship with time. Because **consuming is not just about buying, but also (primarily) about spending time in a shop.** Having done everything in their power to smooth out the purchasing process at points of sale, reduce waiting times at tills and extend their opening hours, retailers are now encouraging their customers to **stay in their stores for longer.** Proof that **time has become a marketing variable** in its own right, just like product offering, price and distribution method.

## Are we beginning to take charge of our own health?

To analyse publishing's biggest current successes is to gain an understanding of the creative trends now coming to the fore. And it shouldn't be too long before these trends become a marketing reality.

### Seen in bookshops

It is generally agreed that the publishing world is particularly competitive and that it is therefore difficult for an author to break through. However, its survival is ensured by a number of sectors that are not necessarily related to literature. At the top of the pile are cookery books, which have lost none of their appeal over the years and continue to reinvent themselves (one need only look at the table displays in bookshops to be convinced of this), and tomes on health, which have gained popularity in recent times. As regards the latter, we are not talking about those that feature a list of problems and prescribe a set of solutions, but those that strive to help us alter our habits so that we can remain healthy. Two of the category's major recent successes are *Votre santé sans risque* (Risk-Free Health), which has already sold 150,000 copies, and *Gut: The Inside Story of Our Body's Most Underrated Organ*, which was written by a young German gastroenterologist (who has yet to reach 30 years old) has sold more than 1 million copies in France and over 2 million in Germany.



### What to think of it?

While health topics have always been a source of fascination for the public at large (irrespective of social class or lifestyle), the popularity of the approach taken by publishing's latest success stories confirms the emergence of **a new conception of the relationship between individuals and their environment.** Faced with the latter's deterioration (frequent pollution alerts, questions surrounding the origin of food products, health scandals, etc.), staying healthy (i.e., living better and for longer) now appears to be as much **about vigilance and individual behaviour** as it is about genetic make-up and medical care. **"My illness is my business and so is my health"**: an attitude that signals that people are increasingly moving away from traditional medicine and placing ever greater importance on prevention. **Prevention is always better than a bad cure.** Nonetheless, the advice of professionals tends not to go ignored, as long as they do not express themselves in scientific terms (with explanations that are difficult to comprehend and sometimes contradictory), but instead use **simple and pragmatic language** that raises awareness and enables people to adopt **new behaviours without too much effort.** **This mix of empowerment and accessible educational methods** closely reflects the expectations of consumers today, which often lead them to consider any brand that is prepared to put out the right discourse, regardless of their area of specialisation.



## After the consum-actor model, meet the consum-author

The desire of consumers to find out about the origin of the products they buy or the know-how that goes into them is such that brands cannot afford to ignore it. The consequence? Ever more opportunities for consumers to get involved.

[www.cestmoiquivabrique.fr](http://www.cestmoiquivabrique.fr)

### Seen more and more frequently

Faced with a growing revolt among French consumers against industrial products, Nestlé has launched a campaign dubbed “*C’est moi qui fabrique*” (“Made by me”), which randomly selects social media users and invites them not only to take a look behind the scenes at its brands’ production sites, but, more crucially, to get involved in the manufacture of their products alongside their regular employees. Five of the group’s plants are on board: Nescafé in Seine-Maritime, Mousline in the Somme, Purina in the Loire as well as Vittel and Natures in the Vosges. The idea of inviting people to take part in the manufacturing process is also gaining ground in the beer industry, where micro-breweries and brewing kits are both proving highly successful. The same is now set to happen with cider: Sassy recently hit its crowdfunding target via KissKissBankBank, giving it the green light to offer its customers cider brewing kits.

### What to think of it?

In an environment that is being shaped by the desire of consumers to **better understand and even control the origin of the food products they purchase**, brands are increasingly happy (or forced?) to open their doors and give consumers a glimpse “backstage”. Inviting their customers into their factories and introducing them to the skills involved in their line of business is one possible response. By doing so, Nestlé is bringing its brands (and its industry as a whole) closer to its customers and **highlighting their human side**. For manufacturers of beer and cider, passing on the rituals involved in their profession **allows them to communicate in more sophisticated terms** with a more knowledgeable audience. However, these initiatives must not be reduced to “straightforward” campaigns of transparency on the part of brands. Indeed, they also need to cater for the expectations of today’s consumers, **who are increasingly keen to take up the offer of new experiences, which give them the chance to discover something new and acquire fresh knowledge**. Finding out more about the products we consume also allows us to gain greater control over how we consume.

## Best-friend brands are the ultimate marketing fantasy

To help customers forget their sometimes overbearing presence in their daily lives, be it on social media or in “reality”, an increasing number of brands are trying to become their “friends”.

<https://frichti.co> / [www.sezane.com/fr](http://www.sezane.com/fr)

### Seen on the Web

As food delivery companies continue to wage war on each other, other models are beginning to emerge, thus blurring the picture somewhat. One such model has been developed by frichti.co, a delivery website whose forte is meal preparation. This is essentially a restaurant with no dining room or waiters. When Frichti makes a delivery, the bag contains a small gift, a hand-written personalised message or a voucher offering a discount on the next order. But such kind thoughts are as much about stimulating their business as they are a token of their friendship. In the event that a customer is not satisfied, a promo code (it too is personalised) is also offered. And to top it all off, Frichti sends customers a text message as soon as their order has been delivered: “Thanks, you’re the best, please leave a comment!” And with advertising that is full of puns and wordplay, Frichti is clearly keen on adopting a friendly tone in all its communications. In this regard, it is not unique among successful internet players. Women’s urban clothing website Sézane no longer refers to its “customers”, but to its “girlfriends”, whom it invites not to its “store” but to its “apartment”. Never was a choice of words more strategic.

### What to think of it?

When it was launched, biscuit brand Michel et Augustin helped to rewrite the code governing brand-customer relationships by adopting an ironic and knowing tone (see L’Oeil from January). Today, Frichti and Sézane are going a step further by endeavouring to **prove how close they are to their customers** with thoughtful gestures that are a sign of empathy. Frichti’s aim is not to guess what consumers want, but to **give them the opportunity to express themselves and to take their opinion into account**, thus creating a much closer relationship founded on attentiveness, self-questioning and the desire to improve. **The B2C (Business to Consumer) relationship sets to give way to the H2H (Human to Human) relationship**, founded on goodwill. In other words, brands are now embracing human values and initiating a horizontal and participatory relationship with consumers. Welcome to the world of the **“best-friend brand”**, a concept that has, of course, been brought to us by social media, where any trace of verticality has been eradicated and where everyone is friends with everyone else, meaning that they always have something to offer each other. By becoming a “friend”, brands **can make people forget how intrusive they can seem, create a feeling of belonging to a community that shares their values and even boost loyalty and the likelihood of being recommended**. This is the ultimate dream of all websites and should undoubtedly be a source of inspiration for brands that were founded last century. Indeed, **which of these more traditional brands can today claim to be their customers’ friend?**



## Should retailers stop treating sales as the starting point of their relationship with customers?

All retailers strive to take good care of their customers, but shouldn't this start before they go through the tills?

Patricia B. / L'Observatoire Cetelem

### Seen in Wasquehal and in Manhattan's SoHo neighbourhood

Inspired by various initiatives launched by US firms such as Nike, whose SoHo store offers customers equipment and clothing to play basketball and football, retailer Boulanger recently opened a new concept store in Wasquehal (near Lille) with floor space of just 300 m<sup>2</sup>. Dubbed "Le Comptoir", it allows customers to try out devices such as vacuum cleaners, thermo-mixers and drones. They can also make purchases, either directly from the store or online. The shop's sales assistants (referred to as "team members") are versatile and present in great number. Their role is to advise and help customers handle the devices, so as to test their ease of use, assess their noise levels and compare their performance. Only products that have been awarded between 4 and 5 stars in customer reviews are available here. Le Comptoir also organises classes (cooking, repairing smartphone screens, etc.) and features a product collection point as well as a 3D printer to produce spare parts.



### What to think of it?

Although uncommon and, according to some, just a novelty, Boulanger's new store possesses all the traits of the retail model of tomorrow. The primary indicator of its underlying intentions is the terminology chosen. The use of the word "Comptoir" (counter in French) rather than "Store" conjures up the images of **discussion, proximity and information sharing**. Referring to "Team members" rather than "Advisors", to break down the barriers between buyers and sellers, generates a feeling of closeness and is geared towards making shopping a genuine experience that people want to share. **These are individuals who aid the transition from desire to purchase, rather than focusing purely on the transaction.** The concept is also supported by the store's design. The premises are relatively intimate and entirely experience oriented – a response to online shopping, which is unable to offer the same physical contact with products. What is being suggested is a brand-new approach to consumption, a cross between a living space and a workshop. Tomorrow's stores will be **forums for interaction, discovery and experiences, rather than being entirely transaction focused.** For this to be possible, it may well be necessary to consider a sale not as a starting point, but as **the result of pleasant and positive interactions** with "team members".

## And also

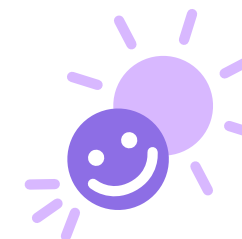
€2.1 billion, or 0.1% of France's gross domestic product: the total value of the **98 million transactions made by consumers via the website Leboncoin in 2016**. The figure excludes property. 18 million people bought and/or sold goods via the platform. 29% resided in rural areas and 50% in towns with fewer than 20,000 inhabitants. 13% were aged under 24, 48% were between 25 and 49 years of age, and 39% were over 50. Lastly, they declared that they were prepared to travel an average of 30 kilometres to collect items purchased.

According to this year's biannual survey by Ipsos and France's National Book Centre, entitled "Les Français et la lecture" ("French reading habits"), 84% of French consumers are readers, with e-books experiencing significant growth since 2015 (+5 points). **In two years, e-books have gained huge popularity among female readers in particular: 49% of the readership in 2017 are women (+11 points).**



According to an OpinionWay survey conducted on behalf of price comparison website Idealo, **52% of people do not own connected devices and have no plans to acquire one in the near future**. Connected clothing is the category that raises the least interest among those surveyed (31%), a long way behind televisions (50%), watches (46%) and headphones (42%), which make up the top 3. (Survey conducted in March 2017 on a panel of 1,009 people.)

**Almost 7 out of 10 French people (69%) would have no hesitation in buying clothes and shoes made in France**, according to a survey by Spartoo. 78% of those questioned state that they have bought clothes and shoes produced in the country. The trend is strongest among individuals aged 50 and over, 89% of whom have previously purchased products made in France. (Survey conducted on 6 April 2017 on a sample of 1,175 people representative of the French population aged 18 and over.)



## Summing Up

French start-up Fitle offers virtual fitting rooms. An app enables users to create their 3D avatar by uploading a full-length photo and entering their weight and height. This allows them to try on products from 200 partner brands.

[www.fitle.com](http://www.fitle.com)

In certain Auchan service stations in Spain and Portugal it is no longer necessary to produce a bank card to pay, thanks to a camera-based licence plate recognition system. Customers just need to enter their PIN code at the till.

 *Véronique B. / Brand, Communication & Advertising*

Barcelona-based start-up Smart Things and Friends has come up with a device, dubbed Roomonitor, which allows individuals who rent out a property to check its noise levels remotely. The device alerts the user with a text message and a call if excessive noise is detected. Three decibel levels can be set and an alert is sent if the noise peaks above the highest level more than five times in seven minutes.

 *Emmanuelle S. / Digital Marketing*



UrbanX has come up with a smart wheel which, when fitted to the forks of a normal bicycle, turns the latter into an e-bike. The project is currently campaigning on Kickstarter.

 *Caroline G. / CSR*

At Porte de La Chapelle in Paris, on level -2 of a 3,500 m<sup>2</sup> car park, start-up Cycloponics recently set up an underground farm named La Caverne. Broccoli, tomatoes and mushrooms will grow under the light of horticultural LEDs.

 *Chloé C. / Internal communication France*

To make life easier for autistic customers, British retailer Tesco recently conducted a six-week trial, during which its Craxley store in Sussex imposed an “hour of calm” on Saturdays from 9 am to 10 am. This involved switching off background music, turning down the volume on televisions and dimming the lights. The initiative could soon be extended to other stores, to attract new populations.

 *Damien S. / Retail Strategy*



Intelligent X is the first beer brewed using artificial intelligence. This premium beer was created based on a machine learning algorithm, which is constantly improved thanks to customer reviews. Consumers can try out one of the four beers sold by the brand in London, before providing feedback.

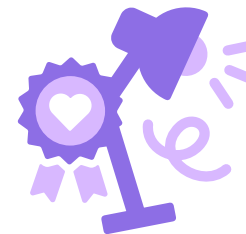
<http://brewing.co>

 *Patricia B. / L'Observatoire Cetelem*

Nissan has launched a version of its X-Trail SUV that is aimed firmly at dog owners: the X-Trail 4 Dogs. Among other features, it offers a leather-padded boot, a shower, a drier, non-tip water bowls, an extendible access ramp and even a camera to keep an eye on pets from the comfort of the front seats.

Castorama now sells interactive wallpaper that can tell stories. To access them, an app needs to be downloaded and each of the characters pictured must be scanned. A total of 55 stories are there to be discovered. Each roll retails for €9.90.

 *Jean-Pierre B. / Marketing France*




## Word of the month



**Sylogomania or compulsive hoarding** is a term used to describe the excessive accumulation of possessions (without actually using them), regardless of their utility or value. Sufferers sometimes take little notice of the hazardous or unhealthy nature of the items in question. This is also known as Diogenes syndrome. Excessive hoarding can even go as far as hindering mobility and interfering with basic tasks, such as cooking and household cleaning, not to mention washing and sleeping.

*Employees of BNP Paribas Personal Finance help to uncover the micro-facts reported in L'Œil by L'Observatoire Cetelem.*

 means that the fact or the news in brief was spotted by one of them.

L'Œil de L'Observatoire Cetelem analyses micro-facts on consumption, revealing the emergence of new manners of spending.

Editorial Director: Sally Guilbert  
Communication: Patricia Bosc – [patricia.bosc@bnpparibas-pf.com](mailto:patricia.bosc@bnpparibas-pf.com)  
Designer and Writer: Patrice Duchemin  
Design: Lords of Design™ / Drawings: Fred Chance™