

l'œil

de L'Observatoire Cetelem

n° 288
February 2022

in depth study of new
consumption trends

<https://observatoirecetelem.com>

To address everyone, you have to address their purchasing power

While price is the preferred selling point of retailers seeking to attract customers, it is clear that this is a highly subjective factor: a low price for some is not necessarily a low price for others...

www.everytable.com/menu

Seen in California

In California, fast-food chain Everytable is founded on the novel concept of pricing its healthy salads and snacks according to the **location of its establishments**. A serving of free-range chicken with lentils and quinoa can cost between \$5 and \$9, depending on the neighbourhood, thanks to a business model built around a centralised kitchen (set up in a district where rents are low) and a fleet of delivery trucks that supplies a large network of small restaurants downtown. The chain plans to open more than 100 restaurants over the next three years.



What to think of it?

While brands in France fight it out based on price differences, which are ultimately fairly small, and endless special deals that allow them to claim they offer the cheapest option, this initiative by Californian restaurant chain Everytable proves that pricing can be used in different ways. **Here, prices are adjusted according to the neighbourhood and the differences are perceptible.** This unique approach expresses the chain's desire to cater for everyone, based not only on the sociological profile of customers, but also on the financial reality that is inherent to where they live. **Unlike other brands, the company's aim is not to adapt its offering, but to fine-tune its prices.** For a restaurant whose model relies on the quality of its products, this **geographically dependent pricing** is also a way of making them accessible to the widest possible audience and thus help in the fight against obesity, especially given how expensive healthy food is in the United States. In this case, the question of price remains a way for the company to differentiate itself, but it also **sends out a message of support to local communities and takes on a social role.** This is what makes the strategy much more than just a promotional tool...

When TV series break out of our screens, a new market comes to life



TV series are a bigger part of our day-to-day lives than ever before. The fashion world has understood this very well, including when it comes to sales strategies...

www.netflix.shop

Seen in the United States and online

Whether it be retro tracksuits and white sneakers from *Squid Game*, corsets from *Bridgerton*, checked coats from *The Queen's Gambit*, Nike Airs from *Lupin* or berets from *Emily in Paris*, TV series are having an ever growing influence on web searches and clothing purchases online and via social media. One consequence of this is the emergence of a new type of online platform: "shop operas" (a reference to soap operas), which are devoted exclusively to selling clothes and accessories that have been spotted on TV. Other manifestations of this phenomenon include Netflix's online store, which now offers outfits and accessories from its various series, as well as US department store Saks opening a space specifically for such products.

What to think of it?

Since *Sex and the City* first appeared, the influence of series on fashion has grown steadily, to the point of becoming a marketing channel in their own right, as demonstrated by the appearance of *shop operas*. Some will see this as confirming the advent of a **new form of leisure pursuit that is as time consuming as it is addictive**, a phenomenon that the health crisis has surely reinforced. Others will see it as shrewd exploitation by a highly competitive textile sector that is always alert to **how tastes and desires are constructed**, but is also driven by the notion of keeping up with the times. Both of these are good reasons to believe in **shop operas as a retail channel for the future and the ultimate expression of "retailtainment"**, a combination of retail and entertainment. This is a business dominated by an offering that is evolving constantly (with each episode and as the characters and story develop) and highly codified, **one that caters solely to fans of a series, who will recognise the products and see them as rallying their community.** Once again, we are drawing closer to the notion of community marketing.

Inspiring and rewarding one's community may be the best way to secure its engagement

To unite their communities, a key element of their success, social media channels can rely on more than just "likes". They can also inspire their audience and stimulate their creativity...
www.tiktok.com/discover/tiktok-kitchen?lang=fr

Seen in the United States

In the US, TikTok has teamed up with Virtual Dining Concepts to turn its most popular viral videos into dishes available for delivery. These include the platform's famous baked feta pasta (40 million views in 2021), smash burgers and pasta crisps. This new service, which has been christened "TikTok Kitchen", will be available in the coming weeks. The profits generated will be used to support the creators of the recipes on offer and encourage others to come up with new dishes. The platform also plans to offer this new service via the establishments it intends to set up. It has announced that it will open 300 of these by the end of the first quarter and 1,000 by the end of the year.

What to think of it?

A social media platform originally founded on the idea of personal expression (as exemplified by its dance and comedy challenges), but which has now branched out into online selling, TikTok is entering a new phase in its development and is now focused on making recipes – another driver of its success – a reality on people's plates. This is social media's own take on the meal delivery business. However, the idea remains the same: **to support a community's aspirations and desire to create by inspiring and rewarding its members**, whether it involves bringing more followers to its subscribers' channels or compensating the authors of the biggest viral recipes. Indeed here, unlike on platforms such as Instagram, the majority of those who cook are amateurs. With this new venture, TikTok's goal is not to become a food service company, but to offer its community the chance to **experience the content they see on their screens in real life**. By doing so, it will further raise its profile among users. It also allows the platform to pursue its ambition of becoming a bona fide brand.



For seniors, making plans has nothing to do with thinking about the future...

Overturning the codes at play in one's market so as to devise new propositions can often be a lucrative path if it is rooted in sociological reality...

www.casabarbara.com/fr

Seen in Levallois

Founded by members of the Trigano family (in partnership with Korian) as a residence for active boomers (the generation born between 1945 and 1965) who want to live communally, Casa Barbara is gearing up to open its first establishment in Levallois. It features 110 apartments, ranging from 26 to 75 sq m, as well as a restaurant run by Pierre Gagnaire. It is meticulously decorated and promises residents a convivial atmosphere and an active social life ("Vive la joie de vivre!" or "Enjoy life to the full!" is the slogan on the site's home page), similar ingredients to those that made Club Med and Mama Shelter so successful in the past. Three additional locations are set to open before the end of 2022.

What to think of it?

With life expectancies increasing and the population's general state of health improving, not to mention **people's growing desire to experiment with new ways of living** fuelled by the images and experiences posted on social media, **tomorrow's seniors will not have the same aspirations as their elders**. Although there has always been a market for seniors, it no longer simply boils down to offering them products and services designed to make their lives more secure and more pleasurable. **Today, the market offers them lifestyles that can truly inspire them**. That is the objective of Casa Barbara, whose approach apes that of a new generation of hotels, which are more concerned with **enhancing the social lives of guests** than with the size and comfort of their rooms. It offers vast spaces capable of hosting events, features a painstaking interior design that breaks with convention to generate social media interaction, and provides screens that make it easier to organise daily life, circulate information and adapt the facility for different uses. These various attributes breathe life into Casa Barbara, **making it more than just a place to live**.





Word of the month

Scalping: a phenomenon that remains relatively uncommon and which can be observed in both the real and virtual worlds. It involves groups of “scalpers” rushing to buy products that companies put on the market in limited quantities and then selling them via buy/sell platforms such as Vinted and eBay at inflated prices. Scalpers tend to target expensive items, such as PlayStation 5s, concert tickets and exclusive sneakers, but also limited-edition products offered by mass-market retailers, especially if they are not available online, which makes a price comparison impossible.



Catching the eye

According to the annual survey conducted by automotive paint manufacturer Axalta, **white remained the most popular colour in 2021, with a market share of 35%**. However, the shade lost 3 points compared with 2020. Asia had the highest proportion of fans of the colour white, with 45% of sales versus just 23% in Europe. **Black came second with an average of 19%**. Its score rose by 4 points last year, but not in Europe where it accounted for just 3% of sales. Grey was third, with a 27% share of sales in Europe and 13% in Asia. Fourth was blue, with an 8% market share (11% in Europe, up 1 point from the previous year), while red came fifth (5%).



A glance in the rear-view mirror

When retail supports personal expression

In Toronto in May 2015, L'Œil spotted an initiative that could inspire the market in 2022, at a time when every economic player wanted to demonstrate its commitment to the environment...

Some retailers have realised that nurturing the expertise of their customers can be an effective way of building loyalty...

The facts

The Kitchen Library in Toronto is essentially a “library” for electrical appliances. For a monthly fee of \$9 (\$25 for three months), anyone can borrow – for a period of five days – all the appliances they need but do not own because they rarely use them or they lack the space to store them (blenders, fruit juicers, machines for making fresh pasta, ice cream or waffles, etc.). In a similar vein, Leroy Merlin offers around a dozen tools via its Facebook page. Customers can borrow them free of charge for 48 hours. They simply need to select the product of their choice, enter their personal details and choose the date on which they would like to pick it up. A confirmation email is then sent to them, which they will need to show at their local store when collecting the tool.

The analysis

In response to the growing number of consumers who believe consumption is all about **enjoyment and utility** rather than possession and accumulation, retailers are coming up with new propositions, as demonstrated by The Kitchen Library and Leroy Merlin. Their ambition is not only to offer their customers access to appliances or tools without having to buy them, but perhaps even more importantly to **make them feel as though they are dipping their toes into the world and culture of trade professionals**. When people have access to professional tools, they feel a little more professional themselves. It also enhances their creativity, their desire to learn and undertake new projects, as well as their self-confidence. One consequence is the emergence of a new mission for retailers: **to be seen as “portals” capable of transporting customers to a different universe**, and no longer simply as distributors that are there solely to provide products. This is one way for retailers to **turn their offering into a bona fide in-store experience**.

Summing Up

Following in the footsteps of Zara and Nike, H&M has opened its first shop in the metaverse. Customers can go there to find inspiration and buy digital products.
www.youtube.com/watch?v=QpdzaBvD0il

Uber is planning to launch driverless deliveries in California as early as this year. The pilot programme will allow meals to be delivered, via the Uber Eats app, from selected restaurants in the Santa Monica area in Los Angeles.

In Germany, Adidas recently unveiled a pair of sneakers developed in collaboration with the rapper Capital Bra. In France, hip-hop artist JoeyStarr has launched his own cooking magazine: Five Starr.
www.fivestarr.fr

Commown is a "unicorn" (a startup operating as a cooperative) that allows people to rent smartphones rather than buying them.
<https://commown.coop>



At the CES in Las Vegas, farming equipment giant John Deere unveiled the first driverless tractor. The vehicle is capable of navigating its way around a field once it has been given a route. It can then plough the soil or sow seeds without further instructions, while also avoiding obstacles.
www.youtube.com/watch?v=gMaQq_vRaa8&feature=emb_imp_woyt

Audi is currently trialling an Audi Charging Hub in Nuremberg, a facility that offers fast charging stations and allows customers to work while their car recharges. They can also have a meal delivered, borrow an electric scooter or get their car washed.
www.audi-mediacycenter.com/en/press-releases/world-first-start-of-the-audi-charging-hub-as-an-urban-quick-charging-concept-14454



Trëmma, developed by Emmaus, allows people to sell their old items to fund socially-oriented projects.
www.tremma.co

In Belgium, in the Delhaize stores in Lovendegem, Waregem and Zwevegem, customers can ask a robot to help them if they cannot find a product. These robots are set to be rolled out in seven other stores.

Amazon has announced its intention to deliver shopping from supermarkets other than its own (Morrisons, Co-op, Amazon Fresh, Whole Foods, Bartell's in the United States and Monoprix in Paris). This will place it in direct competition with Gorillas and dFlink.

In the EQXX concept car designed by Mercedes for the CES in Las Vegas, the seats are made of Mylo, a material derived from mushroom mycelium, while the carpets are woven from bamboo fibre.



The Prêt à Manger chain recently launched a coffee subscription (€20/month) that allows customers to consume five drinks per day. Subscriptions can be cancelled at any time.

French brand Faguo now offers sneakers made from recycled tennis balls. The balls are collected from tennis clubs near Faguo's manufacturing facility in Porto. One ball is enough to make two or three pairs of soles, which also contain recycled rubber.



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

© L'Observatoire Cetelem / BNP Paribas Personal Finance
Director of Publication: Isabelle Wolff
Editorial coordination: Patricia Bosc
Editor: Patrice Duchemin
Design: Lords of Design™