

l'œil

n° 268
February 2020

in depth study of new
consumption trends

by L'Observatoire Cetelem

www.observatoirecetelem.com

A retailer's identity is sometimes defined as much by its customers as it is by its offering

By devising new rules, digital retailers are marking themselves out and developing a new model for the entire retail sector...

<https://picnic.app/nl/>

Seen in the Netherlands

Founded in the Netherlands in 2017, Picnic is an "online only" supermarket whose success is based on simple principles that have enabled it to quickly make its mark on the landscape. The minimum order value is €25, but deliveries are free of charge and made by electric vehicles whose time of arrival is clearly specified. Every week, about a hundred new items are made available on the online platform, some of which have been requested by customers. The retailer's success has been such that anyone wishing to become a customer today is only eligible if they are located on an existing delivery route. Picnic works with 25 distribution centres in the Netherlands and three in Germany. In 2018, the firm's turnover reached €100 million and it had more than 275,000 customers. In 2020, it is expected to make a profit for the first time.



What to think of it?

While real-world retailers are wondering how to use digital to develop new services (click & collect, etc.) without losing customers, some digital retailers, including Picnic, are attempting to invent new rules to make the former seem outmoded. People's home address, which had hitherto been fairly insignificant, is now a key factor in enabling them to become a customer of the store and ensuring that deliveries are made as efficiently as possible, a crucial aspect of the brand's reputation and identity. **Rather than placing the emphasis on free deliveries, Picnic is all about the accuracy of deliveries.** And rather than promising a very wide range, Picnic prefers to offer **a selection on which everyone can have an influence, thus giving customers an active role.** This makes the retailer a kind of living being that adapts as it learns from its customers. **This is a retail model based on self-learning,** allowing it both to manage its stocks more effectively and to meet customer expectations in an optimal way, while also making them **feel that they are being listened to.** This could be one of a number of models that retailers will follow in the future.

Is the *raison d'être* of meal delivery companies really just to deliver?

The profitability of brands is not always down to their supposed core business. Collecting information can be more profitable than delivering sushi or pre-prepared meals...

Seen in the UK

Deliveroo now offers two options to its customers in thirteen UK cities. The first allows meals to be delivered to their home or office. Nothing new here. The second enables them to pick up a meal directly from their chosen restaurant. That's much more unexpected. Delivery charges are eliminated, since the user becomes their own delivery person. 700 restaurants in the UK now offer the service, which is set to be extended to Belgium, Spain and Australia. France is not currently part of the programme. In the United States, Uber Eats is quietly testing a "dine-in" option that allows customers to stay and eat at the restaurant.



What to think of it?

Born out of the idea of delivering restaurant meals to people's homes, Deliveroo has always been launching new services to **reduce the degree to which delivery staff contribute to its expansion**, given that they are a potential source of conflicts and disputes that can tarnish its image. First, it came up with the idea of "RooBoxes" (see l'œil from September 2016), shared kitchens in the suburbs that it rents out to those who cannot afford to open their own restaurant or who want to reach populations located too far from their original address. This means that Deliveroo generates more income from the price of deliveries, not to mention taking control of a crucial aspect of catering. It then launched a subscription system, Deliveroo Plus, which allows customers to benefit from free delivery on all orders. This new service, which **turns customers into their own couriers**, reveals Deliveroo's underlying mission, which **rather than being to deliver to homes so that restaurants can reach new customers, is actually to collect as much information as possible** about customers (habits, preferences, amounts spent depending on where they live) and then make this information available to restaurants, thus positioning Deliveroo as **an ally in their success.** What is important nowadays is not just to deliver, sell or rent, but what each of these commercial transactions allows a company to learn about its customers: **a bona fide BtoCtoB model and a way of delivering not just meals, but greater freedom.**

When a micro-innovation tells us about ourselves

Even seemingly trivial innovations invariably tell us (a little bit) about us and our expectations. Spotting and examining them is always a helpful lesson.

<https://fr.ocni-factory.com>

Seen in France

Coincidentally or not, pencils, which were thought to be on the verge of extinction, are reappearing in markets where no one was expecting them. The Chanel brand recently launched a range of four perfume pencils with a retractable nib. They can be applied directly onto the skin and are available in the four fragrances of the label's Chance line, which is aimed at millennials: Chance, Chance Eau Fraîche, Chance Eau Tendre and Chance Eau Vive. These hold clear appeal for those who are always on the move. Pencils are also the platform for a new gastronomic tool created by OCNI (*Objet Comestible Non Identifié* or Unidentified Edible Object), who have designed a jellified pencil made from agar-agar, which is free of additives and primarily features organic ingredients. When sharpened, the shavings can be used to season any dish with ease. With flavours including lime, ginger, black garlic, Espelette pepper, saffron, porcini mushrooms and shallot, these pencils are made in Alès, in the Cévennes region of France.

What to think of it?

With the widespread use of computers and the rise of social media, one might not have expected to see pencils reappear so soon. Admittedly, they are not returning in exactly the same form. These particular examples lack the wood and the graphite nibs that would allow you to take notes on paper, but they do allow for new uses, be they cosmetic or culinary. It is probably not by chance that pencils are making a comeback and you would be forgiven for thinking that this says something about our times. For what is a pencil, if not an opportunity to express ourselves spontaneously and give free rein to our imaginations? **Express ourselves, yes, but modestly and creatively**, because the aim is no longer to turn everything on its head, but simply to **re-enchant our daily lives** and our immediate environment. With a small gesture, an unusual gesture, a gesture that is completely new. **To change the world, why not start by changing what is within our reach, to suit our tastes and desires?** This allows us to exert an influence on what has been decided on our behalf. **Fun, practical, creative, discreet and simple:** these are the clear conditions to be met by the innovations that seek to seduce us today.



What if brands treated their customers like members of a fan club? Welcome to the world of “fanketing”

Selling products on a subscription basis is being embraced in more and more sectors. We are now seeing the idea being harnessed in the food world.

<https://beverages.cokestore.com/insiders-club>

Seen in the United States

In the United States, Coca-Cola recently set up a subscription service that allows fans to receive its latest creations once a month, even before they are available in stores. The offer has been so successful that within a few hours of its launch, the service was already at full capacity and a waiting list had formed. A subscription to the “Insiders Club” lasts for six months and members (of which there are around 1,000) pay US\$10 per month or a one-time fee of US\$50 to secure access.

What to think of it?

Originally employed in the world of mobile phones and new technologies, the principle of subscription selling continues to gain ground. It first appeared in the form of monthly boxes in a number of sectors (initially cosmetics and later food, cultural products and designer items), before being introduced to the footwear industry by Bocage (see L'Œil from December 2018) and, even more recently, to the furniture sector by Ligne Roset. The fact that Coca-Cola is now using the idea to let consumers access new products is not really surprising, and this is unlikely to be the last we see of this model in the world of fast-moving consumer goods. This is primarily because subscriptions allow a brand to **update its relationship with customers** by shifting towards greater proximity, emotional attachment and involvement. Advertising allows a brand to reach large numbers of people, social media to reach communities and **subscriptions to draw in individuals** who enjoy the rewarding sense of recognition they derive from being early adopters of a brand. Second, subscription systems allow brands to **try their products out on their fans**, which is always more instructive than with consumers who are less involved. Last but not least, they ensure that a brand **regularly enters the thoughts** of its customers, which in this era of social media message saturation is a far from negligible advantage.





Word of the month

KHOL: Known collectively as the “KHOL”, luxury groups Kering, Hermès, l'Oréal and LVMH are being touted as the French GAFA (Google, Apple, Facebook and Amazon). They could be considered as the luxury and beauty equivalent of California's tech firms. When economics and the art of living converge, France can be found at the top of the pile.



Catching the eye

According to the 4th Heaven-Génération Numérique survey on the social habits of under-13s, which was published last December, **84% of children in the first year of secondary school have a smartphone and 56% have a social media account.** By the second year, 71% are on social media. Snapchat appears to be the favourite app of 11-13 year olds, followed by Instagram and TikTok. Facebook, which only ranks 6th, dropped from 42% in 2015 to 13% last year.



A glance in the rear-view mirror

In May 2009, L'Œil reported on a niche phenomenon, one that was no doubt considered insignificant at the time, but which would become completely mainstream a decade later.

Recessionistas

The facts

Coined by the New York Times at the beginning of the financial crisis, the term *recessionistas* refers to women who want to keep up with the latest fashions despite a tough economic climate. Swapping, sharing and recycling are their new consumption strategies. Flea markets and car-boot sales are their stomping grounds and the internet is their medium of choice, because it allows them to quickly organise fashion swaps and second-hand clothing sales via their blogs.

The analysis

Far from being invariably synonymous with gloom and deprivation, the current economic crisis is an opportunity for all those who do not want to give up consuming to shake up their habits by initiating new approaches. Customization, salvaging, used clothing sales and fashion swaps between friends are helping to define new attitudes to clothes shopping. Attitudes that are more sustainable and more responsible, since clothes and accessories circulate from home to home, but also a greater focus on fun and togetherness, because these swaps take place within communities of like-minded individuals. Are we witnessing the emergence of a new model that is non-monetized and community based, built on exchanges and human encounters, rather than on a frenzied rush towards the new and the accumulation of status symbols?

En bref

Unveiled at the CES in Las Vegas, the connected Bic razor will allow the brand to better understand how its users move when shaving, the time spent on the process, the temperature and even the number of litres of water used to rinse it. Bic plans to initially recruit 500 exclusively American volunteers.

In the United States, the TARGET chain of stores is currently rolling out small outlets in urban centres, with the intention of giving each of them a unique identity. The aim is for them to sell a range tailored to the needs of local inhabitants, as well as calling upon local artists to decorate their front windows and interiors.

In the Netherlands, H&M has announced that it is trialling a bicycle delivery service through a partnership with delivery company Fietskoeriers.nl. Delivery workers employed by Fietskoeriers.nl collect packages from H&M's warehouses and transport them to sorting centres using biogas-powered vehicles. The packages are then transported by bike and delivered to the homes of customers the day after their order is made online.



Blink is an application that promotes good eye health. It uses the TrueDepth camera system and offers various exercises to be practiced several times a day to improve one's vision and become less prone to stress. The application already has 12,000 users. www.youtube.com/watch?time_continue=1&v=C_QXZkYDV68&feature=emb_logo

"Nous", an anti-waste grocery store that already has seven outlets in France, has just opened its first Parisian establishment (on Place des Fêtes), where it offers all the products that supermarkets reject (short shelf life, damaged packaging, "ugly" fruit and vegetables), as well as production surpluses. It offers an average discount of 30%. www.nousantigaspi.com

Posti, the Finnish postal service, recently launched a new parcel collection concept: a "Posti Box" featuring changing rooms, so that users don't have to go all the way home to work out whether they want to return their parcel. Most of these boxes are located close to major roads, to reduce travel times for consumers.



Jennyfer, a fashion retailer that seeks to reach 10-19 year olds, recently introduced a "PleazPay" button, which allows an order to be communicated directly to a third party, often the parents, who can then modify it remotely. www.jennyfer.com/fr-fr/new-pleazpay.html

Amazon has set up a new programme geared towards automating the donation of unsold goods from the web merchants it hosts, in response to criticism of the destruction of these items. The idea is to simplify and streamline the administrative procedures required to deal with recipients.

Damart recently launched a voice application that can be accessed via Google Home smart speakers and Google Assistant-compatible smartphones. The aim is to help users find a store or the most suitable item of clothing according to the weather, their style preferences and their profession. Answers to queries are provided via text message.

The circular economy appears to have no limits, with the Ford Group recently announcing that it is teaming up with McDonald's to launch a pilot project to produce certain components from waste coffee beans.




As part of its efforts to recycle its organic waste, the Super U supermarket in Evron (near Le Mans) turns everything that would normally end up in bins into compost, which is then made available to customers. A first in France. The goal is to achieve zero waste.

On Audi's future Q4 e-Tron, buyers will be able to choose between 25 different light signatures for the front and rear of the vehicle, while on the next Tesla electric car, drivers will be able to select their own audio identity, including the sound of the horn, but also that of the vehicle when driving at low speed.



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.

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