

l'œil

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in depth study of new
consumption trends

by L'Observatoire Cetelem

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All companies want to show their engagement. To do so, some are happy to let their logo do the talking

Who says that logos should remain untouchable in the name of that all-important brand identity?

Seen in Spain and Brazil

As a response to social distancing guidelines, it was in Brazil that McDonald's first had the idea of separating the two arches of its logo as an amusing, clever and neat way of reminding people of the advice. Zara has followed suit by spacing out the letters of its visual identity, barely a year after an update that had brought them closer together... Thus, the characters will remain clearly separated for the time being, as well as being accompanied by an explicit message reminding readers to keep their distance. The initiative is part of the viral project #The200Challenge, which was launched by Barcelona-based agency Shackleton and is aimed at Spanish companies. El Corte Inglés, Desigual and Telefónica have already contributed.



What to think of it?

When it comes to "tinkering" with their logo, companies are always very cautious. They issue numerous warnings and precautions, and some have even been forced to backtrack after an unsuccessful facelift. Originally a point of reference, a beacon, a reassuring signal intended to convey the company's values, logos are suddenly endowed with a new function in times of crisis: **to communicate a brand's engagement**. This is an important step forward. Just over a year ago, Lacoste had already replaced its famous crocodile with endangered animals so as to raise customer awareness of ecological causes. Today, McDonald's and Zara are stepping into the breach and **turning their respective logos into a statement, a living symbol that** (temporarily) distances them from their traditional guise. This is a move that allows these brands to highlight their modernity. Because in a world crisscrossed with networks and images, in which everyone is always expressing an opinion and everything moves and morphs to the point of contradiction, **logos seemed static and immutable. Now they are rising from their slumber.** This is a new opportunity for brands that are keen to express their vision of the world.

Since mid-March, supermarket chains have taken on a new role



During the lockdown, a number of retailers launched original initiatives. Many of them are already mapping out what their business could look like in the future...

Seen in France and Belgium

During the course of the current health crisis, supermarket chains have rolled out a whole host of initiatives. Of course, some were aimed squarely at health workers, but others may well become part of all our daily lives. Magasins U stores committed to supporting their producers by selling their surplus stock. Some Carrefour and Intermarché stores set aside a daily shopping slot for older customers, while Franprix and Monoprix delivered cheap grocery baskets to their homes free of charge. Carrefour joined forces with Uber Eats to ensure it could make deliveries, while Monoprix teamed up with Sarenza to enable the latter to sell its beauty and hygiene products via its website. In Belgium, Delhaize decided to grant a 5% solidarity discount on all purchases made in its stores, rather than to resume promotional campaigns that would have placed potentially harmful pressure on its employees and suppliers. The retailer also offered a selection of sporting goods for the home by Decathlon, all of whose stores were closed. The same initiative was adopted in France by several Franprix stores.

What to think of it?

Never have major food retailers enjoyed as much of the spotlight as they have during this health crisis. Not only because consumers have had to buy more food products than they normally would (due to the closure of restaurant and canteens), but also because these chains have identified this as **an opportunity to boost their image** by demonstrating their responsiveness and adaptability. It is often in times of adversity that creativity is unleashed and positions shift. After fighting on the battlegrounds of choice, pricing, healthy eating, the environment and local sourcing, retail chains are now endeavouring to **take on a social role. Or better still, to make a civic commitment that goes beyond their usual strategy of signalling their proximity and empathy.** They have expressed this desire by forging closer ties with other companies (and not simply for the purpose of sharing customer data), by promoting the work of their teams, by adjusting their offers to specific target groups (seniors and vulnerable individuals) and by signing agreements with producers or a particular sector so as to serve the public interest. Such initiatives **are geared towards meeting a new challenge: acting for the collective good.**

Periods of restriction are always conducive to the emergence of new approaches

During the lockdown, there was unprecedented cooperation between retailers. Could this last beyond the crisis?

<https://keepyourdrive.eu/home-fr>

Seen in Belgium

During the lockdown, Decathlon, whose stores were closed, made its staff available to the Colruyt group's food stores. Every employee could ask their team leader to sign them up and thus benefit from additional income. Due to the restriction of movement in place during the lockdown, Mini Belux (whose demonstration vehicles are currently not in use) and Get Driven (a driver rental company that is also out of action) have decided to provide a vehicle and driver to 15 Belgian restaurants and brasseries for four weeks, to enable them to deliver meals to the homes of customers. These establishments are located outside major cities and therefore cannot use existing home delivery services.



What to think of it?

In times of crisis, ideas bubble up in people's minds. Until very recently, retailers sometimes worked side by side with others to come up with collaborations and highly appealing exclusive and ephemeral offers designed to draw attention and stimulate people's desire to make a purchase. These alliances would take the form of a "collector's product" or a corner in partner stores (e.g., Birchbox at Monoprix or Hema at Franprix: see L'Œil from December 2019). The initiatives that emerged during the lockdown suggest that **service-based collaborations are also feasible**. Today, these are **unprecedented signs of solidarity**, but could they one day become **a whole new way for brands to express themselves**. While the idea of offering staff to other retailers seems difficult to put into practice, it is easy to imagine that businesses **could occasionally exchange skills** (e.g., florists selling perfumes and perfume shops selling flowers, or sales assistants from DIY retailers working for interior design stores) or make **alternative use of their resources**, such as transforming a fleet of taxis into delivery vehicles or sharing delivery services with other stores nearby. **This would allow retailers to demonstrate both their proximity and their flexibility.**

After ready-to-wear, ready-to-share could soon be the driving force behind shopping centres

Shopping centres invariably reflect consumer expectations. If the latter evolve, the former must adapt.

Seen in France

In 2019, for the first time in a decade, French shopping centres halted the decline in their footfall and turnover. The number of visitors increased by 0.3% and revenue rose by 0.8%, despite the strikes in December. In sectoral terms, health & beauty, sports, catering and entertainment performed well, while personal apparel (textiles and accessories) continued its downward slope.



What to think of it?

Today, shopping centres are proving that their survival depends on their ability to **meet consumer expectations** and perhaps even to come up with new services that resonate with the state of our society. In the past, consumers were essentially interested in price and choice. Nowadays, what they are really keen on is new experiences and services. **Now more than ever, consumption and entertainment are intertwined**, allowing the former to feed off new motivations and the latter to access new sources of revenue. Also more than ever, **sharing moments with others and enjoying experiences** are prioritised over **ownership, which is increasingly viewed as overwhelming and often meaningless**. Catering in all its forms has gradually taken over from ready-to-wear, and beauty (from fitness to skincare) is now beginning to follow its lead. Times really are changing. Lastly, one cannot explain the renaissance shopping centres are experiencing without mentioning **the new generation of low-cost retailers that have sprouted up** within their walls, including Hema, Action and Normal, which, thanks to their wide variety of nationwide brands, clever merchandising and ultra-competitive prices, manage to appeal to everyone and not just bargain hunters. Thus, shopping centres are giving us their own **winning equation for the future of retail: Experience + Price.**



Word of the month

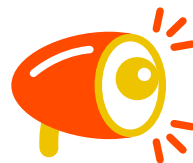
Tierratrauma: an acute state of solastalgia (see the January 2020 issue of L'Œil). Individuals who feel a strong connection to the earth can sometimes experience deep emotional trauma when this connection is affected by a sudden environmental change. They feel this emotion directly, whether they are in the presence of this change or in another location. For instance, **tierratrauma can occur when a fire destroys our immediate environment or when trees are chopped down to make way for a road.**



Catching the eye

According to a survey conducted by YouGov for Society magazine on 6-7 April, **87% of French people want to “see society change”** (Yes, absolutely: 52% / Yes, somewhat: 35%) after the current health crisis. Financial regulation and the ecological bonus are their two key priorities for the post-crisis period.

According to a survey conducted by Opinionway for the Rosapark agency on 29-30 April (1,027 people over the age of 18 were interviewed), **41% of French people believe that supermarkets have enjoyed an image boost during the lockdown.** This is felt most strongly by those in lower socio-economic categories (47% vs. 39% in the case of higher categories) and inhabitants of the regions worst affected by Covid-19 (Ile de France: 43% / Northeast: 45%). 48% of the consumers surveyed stated that they are now more conscious of the dedication of shop staff, especially cashiers.



A glance in the rear-view mirror

17 years ago, L'Œil reported on a new sharing trend that failed to develop as one might have hoped. A bit of a shame. But it's never too late.

Book exchanges
www.bookcrossing.com

The facts

“Bookcrossing”, a new kind of global treasure hunt, involves voluntarily leaving a book in a public place for a stranger to enjoy, before continuing the chain themselves. Book exchangers can log in to the bookcrossing.com website and register the books they wish to “misplace” under a number that will appear on the back cover. This will allow them to track each book's journey and even to hear the opinions of successive readers. 3,000 books are believed to have been released into the wild in Paris.

The analysis

Once feared to be the death knell for books, the internet has gradually become their greatest ally, be it in terms of boosting their sales or bringing together international communities of readers. “Bookcrossing” is a fun new idea that goes beyond the usual exchange of opinions between friends who have read the same book, by allowing readers to meet other literature fans. Somewhere between planned chance and premeditated forgetfulness, the joy of taking part in this urban treasure hunt is greatly amplified by the power of the web. Could this be an original way of arousing people's literary curiosity, one based more on their inventiveness (readers choose the place and time at which they “misplace” their book) and the promise of an interesting experience than on the intrinsic qualities of the books themselves?

Summing Up

Each day during the lockdown, Gallimard digitally published short and original texts by authors featured in its "Tracts" collection. These texts were made available to download free of charge and will be compiled into a special collection once the crisis is over.

<https://tracts.gallimard.fr/fr/pages/tracts-de-crise>

Created by the three managers of a bar in Lille, Confinouze is a beer brewed during the lockdown. The crowdfunding campaign launched when the project began has exceeded its target.

<https://fr.ulule.com/confinouze>

In Germany, Lidl is now revealing the identity of those who supply the products for its own food and non-food brands. Not only is this a first, it is also a show of transparency.

In the state of New York, which has been severely affected by Covid-19, people have been able to marry by videoconference since 18 April. State officials can issue marriage licences to couples who wish to take this opportunity. Videoweddings are now a reality!



In Switzerland, startup Peas&Love offers people the chance to rent one or more plots of land in vegetable farms maintained by community farmers. The service is aimed at those who lack green fingers, a garden or the necessary time, but who still want to enjoy a healthy diet.

www.peasandlove.com

The OpenTable restaurant booking platform has devised a tool to help grocery stores (and, in the future, restaurants) prevent overcrowding in their premises. Users can select a time slot, which is then confirmed to them by text message.

After signing an agreement with iZettle (a subsidiary of PayPal), Stuart (which is owned by French postal service La Poste) now offers a home delivery service for pharmacies and small retailers. Delivery costs are paid either by the customer or the seller.



Since the beginning of the lockdown, French clothing brand Roseanna has offered a web service that allows customers (and future customers) who are self-isolating to receive an hour's worth of advice remotely and by appointment. According to the brand, its conversion rate is 70% and the average basket value is much higher than usual.

<https://roseanna.simplybook.it/v2>

Italian educational toy manufacturer Clementoni recently launched a range of over 100 products made entirely from recycled and recyclable materials. The brand is also offering new scientific and educational toys focused on environmental protection, to raise children's awareness of the issue.

GIVE (Generosity, Innovation, Value and Emotion) is the new monthly magazine launched in France by the Condé Nast group. Its contents revolves around the theme of positive societal commitments. Health, the environment, education, social inclusion and culture are the five pillars of the publication, which will provide a platform to those whose initiatives are transforming the world.

www.vogue.fr/mode/article/give-magazine-engagements-positifs



In the Belgian city of Bruges, Para Ti is a new food retailer that only sells local products (fresh and non-fresh) and uses a fully automated system. Sensors detect what the customer picks up from the shelf and payment takes place automatically via the mobile app. Para Ti is open 24/7.

Since the closure of local markets in Angers as a result of the lockdown, market gardeners have found refuge in the city's shops, which have graciously opened their doors to them.



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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