

# l'œil

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June 2020

in depth study of new  
consumption trends

by L'Observatoire Cetelem

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

## All retailers can play a role in improving urban mobility

Faced with expectations of new urban mobility solutions, all retailer could potentially become distribution channels...

[www.darty.com/achat/boutique/ami-citroen-electrique/index.html](http://www.darty.com/achat/boutique/ami-citroen-electrique/index.html)

### Seen online

Around 30 Fnac and Darty stores, as well as Fnac.com, Darty.com and the Citroën website, are now selling a brand new fully-electric and licence-free car: the Ami. Available for long-term hire from €19.99/month and for immediate purchase from €6,000 inc. VAT, Citroën will be delivering the Ami to the homes of buyers from July. Special pop-up outlets have been opened near participating stores to allow potential buyers to take a test drive upon appointment.



### What to think of it?

The merger between Darty and Fnac already seemed surprising to those who studied marketing last century. The partnership's decision to launch a licence-free electric vehicle should relieve them of their certainties for good. **The urban mobility market is such a strategic area for brands** (because of its future potential) **that they all want to get in on the act** to demonstrate their modernity. Fnac and Darty have not resisted the temptation, since they already offer hoverboards, electric scooters and electric bicycles (e-bikes). Offering this new licence-free vehicle is the next step for the two-headed retailer, one that allows it to express its **commitment to innovation and good citizenship** by promoting the development of an alternative eco-friendly model. Both high-tech and cultural, the Ami is the perfect embodiment of the merger between Darty and Fnac. For a brand, **evolving is not only about updating its offering and its outward appearance, it is also about accepting to move away from familiar territory.**

## The new protagonists of retail

As a result of current health regulations, companies are coming up with their own ways of staying in touch with customers. Necessity is the mother of invention... and the new normal of the future.

[www.achetez-grandnancy.fr](http://www.achetez-grandnancy.fr),  
<https://deliveroo.co.uk/menu/reading/reading-editions/essentials-by-deliveroo-editions-rdg>



### Seen in France and the UK

To support retail, the Greater Nancy metropolitan area has launched an e-commerce platform dubbed "Achetez Grand Nancy" (Buy Greater Nancy), which all shops in the region can access. The platform already plays host to 50 stores. Orders are available for pick-up at outlets or delivered by bicycle. As of this month, more and more Casino group stores (Franprix, Monoprix, Géant) are being listed by the Deliveroo app, which ensures delivery in thirty minutes (1,500 stores will be listed by 2021). In April this year, Carrefour joined forces with Uber Eats for the very same reasons. Decathlon products are now available at Franprix, Auchan and Carrefour, while C&A recently announced that it will have a presence in 7 Géant Casino hypermarkets this summer. In the UK, **Nestlé and Deliveroo are working** together to deliver snacks, treats and coffee to people's homes. Finally, Harrods in London is set to rent a vast space in the city's Westfield shopping centre so that it can welcome customers during the sales while still complying with health guidelines. Never have the laws of retail been so frequently reinvented.

### What to think of it?

Faced with all the constraints imposed by the health crisis, retailers have come up with **innovative and pragmatic solutions** that would probably never have seen the light of day otherwise. This has allowed them both to protect their business and to reinvigorate their relationship with customers, because every crisis offers firms an incentive to reinvent themselves and push their boundaries. What we see taking shape through these various initiatives is **a more agile and cooperative retail sector**. The new models that have emerged fall into four main categories. **Umbrella retailers**, which sell other brands as well as their own, so as to share their values and customers. **Mobile retailers**, which use meal delivery apps to win the battle of the last mile and fast delivery. **Globalised retailers**, which bring together stores located in a particular geographical area and thus cater for people's desire to consume in a way that benefits their community. **And duplicated retailers**, which open a second outlet so as to easily accommodate more customers when holding specific events (such as sales), like a sort of new-generation pop-up store. These models are not just a tactical response to today's consumer expectations. Indeed, they are likely to endure because they offer new growth opportunities and **enhance the perception and role of those who initiate them**. Tomorrow's world is already here if you know where to look...

## Is local solidarity the ultimate form of community mindedness?

Built on a model that combines healthier eating and community solidarity, the “*C'est qui le patron*” (Who's the Boss) brand has seized the opportunity offered by the lockdown to enhance its status...

[www.welco.io](http://www.welco.io)

<https://lamarqueduconsommateur.com/la-demarche/comment-ca-marche/>

### Seen online

Known for having rewritten the retail rulebook by adjusting the price of milk (and now thirty or so additional products) to increase the amount paid to producers, “*C'est qui le patron ?!*” recently created a model that enables food service companies affected by the health crisis to secure a portion of their income. By visiting a dedicated website set up in partnership with Welco.io, anyone can order “*C'est qui le patron ?!*” products and have them delivered (free of charge and with no minimum order value) to those restaurants involved the project and which have been closed since mid-March. These outlets are then paid around 100 euros per bulk order, which they must take delivery of and distribute. “*C'est qui le patron ?!*” has around 15 million regular or occasional customers.



### What to think of it?

Since it was founded in 2016, the “*C'est qui le patron ?!*” brand has proved that it is possible to **reinvent the relationship between producers and consumers**. Not by bypassing mass retail (where the brand is also present), but **by relying on a sense of community**, given that all the responsible products carrying the “*C'est qui le patron ?!*” brand are co-produced by around 10,000 member-consumers who determine the specifications, manufacturing methods and prices of the products. The public health crisis has given the brand the chance to demonstrate its credentials when it comes to solidarity by reaching out to restaurants. **Prevented from doing their normal job, many have already turned into local outlets** that sell not only their own dishes to take away, but also products from their suppliers (which were often mentioned on their menus previously) and, in many cases, the products of “*C'est qui le patron ?!*”. This is a simple and adaptable system that can even be tailored to small towns. It offers advantages to both parties: **the brand increases its notoriety and reach**, while restaurants have the opportunity to (partially) **make up for their loss of business and highlight the role they play in their neighbourhood**. Here, solidarity is synonymous with proximity.

## If brands are always looking for new realms to conquer, why not choose the world of video games?

Given that all brands ultimately want to define their own realm, why should the latter be confined to their own products and story?

[www.madmoizelle.com/defile-gemo-animal-crossing-new-horizons-1049555](http://www.madmoizelle.com/defile-gemo-animal-crossing-new-horizons-1049555)

### Seen online

During the lockdown, low-cost clothing and accessories retailer Gêmo set up a novel partnership with Animal Crossing: New Horizons, a video game with a quite childlike design that was first launched in the 2000s. The latest edition was released at just the right time, on 20 March, and proved to be a great success during those six unusual weeks. Faced with the inability to photograph its latest collections, the brand came up with the idea of featuring them in the game, where they were transformed into pixel art and could be selected by players to dress their avatars. A fashion show was also organised within the game, in conjunction with women's magazine madmoiZelle, and this virtual world even had its own Gêmo store, just to whet the appetite of potential buyers. The idea was later adopted by two luxury brands: Valentino and Marc Jacobs.



### What to think of it?

While brands have always paid close attention to the experience they offer in their stores, the moment that precedes a purchase (and which prompts the latter, if successful) often revolves around the showcasing of their range on their website or on social media, accompanied by storytelling tailored to the context. The path chosen by Gêmo, Valentino and Marc Jacobs, inspired by the constraints of the lockdown, proves **that brands can exist in the virtual world other than through their e-commerce site or social media**. Given that gaming holds natural appeal for members of generation Z and millennials, the keenness of brands to jump on that particular bandwagon is not surprising. Because **games are not just a way of escaping and interacting, they are also realms in the own right. Just like brands**. When incorporated into a game (or any other cultural activity), **consumption ceases to be a separate activity and becomes part of a lifestyle** enhanced by experiences that are fun, individual or shared. Various sports equipment brands have previously ventured into the video game world to promote their products, without ever moving away from their familiar domain. But Animal Crossing is **so far removed from reality that it offers brands the opportunity to appear in a completely new light** and thus enhance their identity. When the real world invites itself into the virtual world, it emerges transformed.

## Reinventing retail means reinventing the form it takes and the stakes involved...

Countering the desertification of city centres does not mean trying to reproduce the models of the past, but instead inventing new ones...

<https://lesbohemiennes.com>

### Seen in Ascaïn (Basque Country)

After she opened her jewellery store in the Basque town of Ascaïn (4,200 inhabitants) in 2015, Anne-Laure Arrubarrena gradually expanded its range to include accessories and clothing, before setting up a second store three years later in another village in the region: Saint-Jean-Pied-de-Port (1,580 inhabitants). This was the birth of the "Les Bohémiennes" network, whose ambition is to focus on small towns facing commercial desertification. Les Bohémiennes stores sell hippie chic clothing, shoes and jewellery with a mid-market positioning. The chain seeks out small premises (40-70 square metres), with an investment limit of €45,000 so as to access Rural Revitalisation Zone (ZRR) subsidies. Several openings are planned this year in the south and east of France.

### What to think of it?

Faced with the desertification of city centres and the rise of online sales, local shops must reinvent themselves by coming up with **new models capable of establishing new types of relationship**. This reinvention must always tick three boxes, as Les Bohémiennes illustrates very well. First, it must take **a tried and tested form**, not only to trigger people's desire to embark on a retail adventure, but also to ensure easy deployment in the heart of towns that are often struggling and therefore offer attractive commercial leases. Second, it is important to **offer something original** that cannot be found online or in shopping centres, with the help of independent designers or local craftspeople. Lastly, it must **generate a community spirit** which, in this case, is expressed as much in the choice of name (which conjures images of travel and tribes) as by **a deliberately limited range** whose strength lies in the fact that customers feel they are accessing something rare and are drawn to the store again and again. These are two crucial loyalty-building factors. Shouldn't the projects that are the most capable of revitalising town centres place **an equal focus on potential entrepreneurs, local producers and those who see consumption as a form of activism?**



## A glance in the rear-view mirror

*Two years ago in Hamburg, L'Œil spotted an initiative by H&M that could signal the birth of a new retail model... Rather than focusing on convincing consumers to buy more, tomorrow's retailers will try to encourage buyers to take greater responsibility.*

### Seen in Hamburg

At number 12 Spitalerstrass in Hamburg, H&M recently unveiled its latest pilot concept store, dubbed Take Care, which is geared towards highlighting the brand's green credentials and its intention to use only recycled or sustainable materials by 2030. What Take Care offers is not just another range of clothes aimed at a particular age group or lifestyle, but cleaning products (the brand's first line of detergents, which are "Good Environmental Choice" certified and made in Sweden), sewing workshops (led by influencers) and advice, both online and on tablets, to help customers keep fashion items for longer (removing lipstick stains, sewing on a button, darning, etc.). Customers can also have their clothes mended at the store by a professional, regardless of the brand. The project, which is currently at the trial stage, is set to be deployed throughout H&M's retail network.

### What to think of it?

Other than the fact that it doesn't sell clothes, the originality of H&M's latest store concept lies in the idea of **rallying customers around a cause that will benefit the planet**. The aim here is not to pass on a proportion of the proceeds to charity, to bring eco-friendly products and packaging to the masses, or to place a spotlight on manufacturing conditions, but to encourage buyers to take care of their purchases by helping them to extend product lifetimes. **Why should retailers be alone in making an effort?** Geared towards attracting attention as well as new populations, this concept will be perceived by those with a sharp eye as heralding **an important future avenue for retail**. Following in the footsteps of retailers that sold products and then sold services to make the most of the products purchased, we are now entering an era where **retailers encourage their customers to reduce their purchasing frequency by extending the useful life of items they already own**. Will textile brands soon be offering in-store workshops similar to those we now see in DIY stores?



## Word of the month

**Hygiaphone:** created in 1945 by a French company at the request of rail operator SNCF, following a flu epidemic that affected a huge proportion of its sales staff, “hygiaphones” (or speech panels) saw their use in banks, post offices and embassies increase in the 1980s and 1990s. They were done away with in the early 2000s, because they were seen as synonymous with unfriendly and remote bureaucracy. The current health crisis could very well see them return...



## Catching the eye

According to a recent zOOM survey by L'Observatoire Cetelem, the lockdown has had a positive impact on the food consumption of the French population. **Buying French-made products is something that 83% of French people are keen to do** to support the economy (87%) and struggling producers (89%): consuming less, more healthily and locally lies more than ever at the heart of their preoccupations.

(Online survey conducted by Harris Interactive on 20 and 21 April 2020. Sample of 1,005 people.)  
<https://observatoirecetelem.com/les-zooms/enquete-2-3-vecu-et-lecons-du-confinement-queles-changements-se-dessinent-pour-le-jour-dapres/>

Pocket tips With Bulletin, a new media outlet that offers useful and original information to make day-to-day life easier. Circulated in the form of mini-magazines, the bulletins are delivered by email on a weekly basis. **While it is still early days for the publication, three bulletins are already available:** “Get informed without getting depressed”, “A little shot of general knowledge” and “Learn to know yourself better”.

While it is probably still too early to assess how much the lockdown will alter behaviours in the long term, the latest Observatoire Cetelem zOOM survey has enabled us to obtain a few initial insights. **Questioned three weeks after the end of the lockdown, the majority of French people (67%) feel that life will never be quite the same again.**

They believe that the biggest changes will affect how they consume (52%) and work (55%). However, their desire to return to the kinds of social interaction they used to enjoy is palpable (66%).

(Survey conducted by Harris Interactive on 3 and 4 June 2020) Sample of 1,038 people.)  
<https://observatoirecetelem.com/les-zooms/enquete-3-3-deconfiner-pour-queles-perspectives/>

## Summing Up

In Belgium, while its physical stores were closed, Ikea offered personalised advice via video calls. Consumers were offered half an hour of free advice from one of the retailer's employees to help them make the right choices.

The "Sauvons nos Commerces" (Save our Shops) platform helps small retailers who have fallen foul of the health crisis. It offers vouchers that can be used in any participating store up until June 2021. Users can also recommend a shop that they would like to support.

<https://sauvonsnoscommerces.herokuapp.com>

Since 11 May, the date the lockdown was lifted, Châtelet-les-Halles metro station has been equipped with cameras and recognition software capable of quantifying the number of people who are wearing masks. The survey is intended to last 3 months.



Decathlon is expanding its long-term bike rental service with a no-obligation subscription offering. Christened Decathlon Rent, the service will be trialled in Paris and Lyon as of June. It offers five models, including two electric, from €15 per month.

French startup Gazelle Tech has come up with a very lightweight electric city car made from composite materials. It is 4 metres long, can carry 5 people and uses half as much electricity as a conventional model.

[www.gazelle-tech.com](http://www.gazelle-tech.com)

Porsche offers its fans video conferencing backgrounds depicting the seats of its vehicles.

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

Ortovox, a German brand specialising in hiking and outdoor activities, allows its e-shop customers to support a retailer by donating up to 25% of the value of every order placed. Customers can choose which store they would like to support out of a selection of shops in each region.

[www.ortovox.com/fr-fr](http://www.ortovox.com/fr-fr)



Google recently announced that it is adding augmented reality to Google Maps to offer users visual markers, especially at the exits of metro stations. And to prevent users from causing accidents when they are concentrating on their screen, these markers darken as soon as they start walking.

BMW has introduced a bonus points system for those who drive in electric mode in areas where it is recommended. These points can then be redeemed in exchange for free recharges.

Shirt brand Figaret now offers "imperfect" shirts (those destined to be binned) at attractive prices in four of its stores. A special label ("Figaret à l'imparfait") draws attention to the defect.

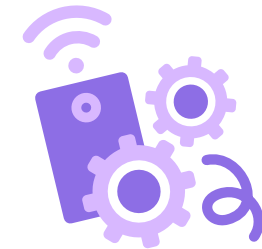
[www.figaret.com/fr/edito/maitre-chemisier-se-met-a-lupcycling/](http://www.figaret.com/fr/edito/maitre-chemisier-se-met-a-lupcycling/)



In Belgium, the ShopSafe app provides real-time information on the number of people who visit a point of sale, based on the number of active phones around the location. The data is supplied by a telecom operator.

Customers of certain Monoprix stores can now take advantage of the solution devised by the startup Lineberty: users choose a time slot via their mobile phone and receive a virtual ticket that they can then present to access their store without having to queue.

[www.lineberty.com/monoprix](http://www.lineberty.com/monoprix)



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

**OO** 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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