



Retail
Detail







Fairytale

THE PAST 50 YEARS

more people
more spending power
wanting exactly **the same** things

HOLY TRINITY OF — RETAIL





Chair
de crabe
Crab Meat

Viande et poisson
en conserve
Canned Meat & Fish

Viande
en conserve
Canned Meat

Repas de pâtes
instantanées
Instant Noodle Meals

Pommes de terre
instantanées
Instant Potatoes

Pâtes
en conserve
Canned Pasta

Pâtes
Pasta

Aliment du Québec
Food of Quebec

Aliment du Québec
Food of Quebec

En achetant certains produits, vous soutenez les producteurs locaux.
When you buy certain products, you support local producers.
Pour en savoir plus, consultez notre site web.
For more information, visit our website.
www.alimentduquebec.com



FROM 1 SHOP TO CHAIN

Get your **back-office right**

Margins per m²

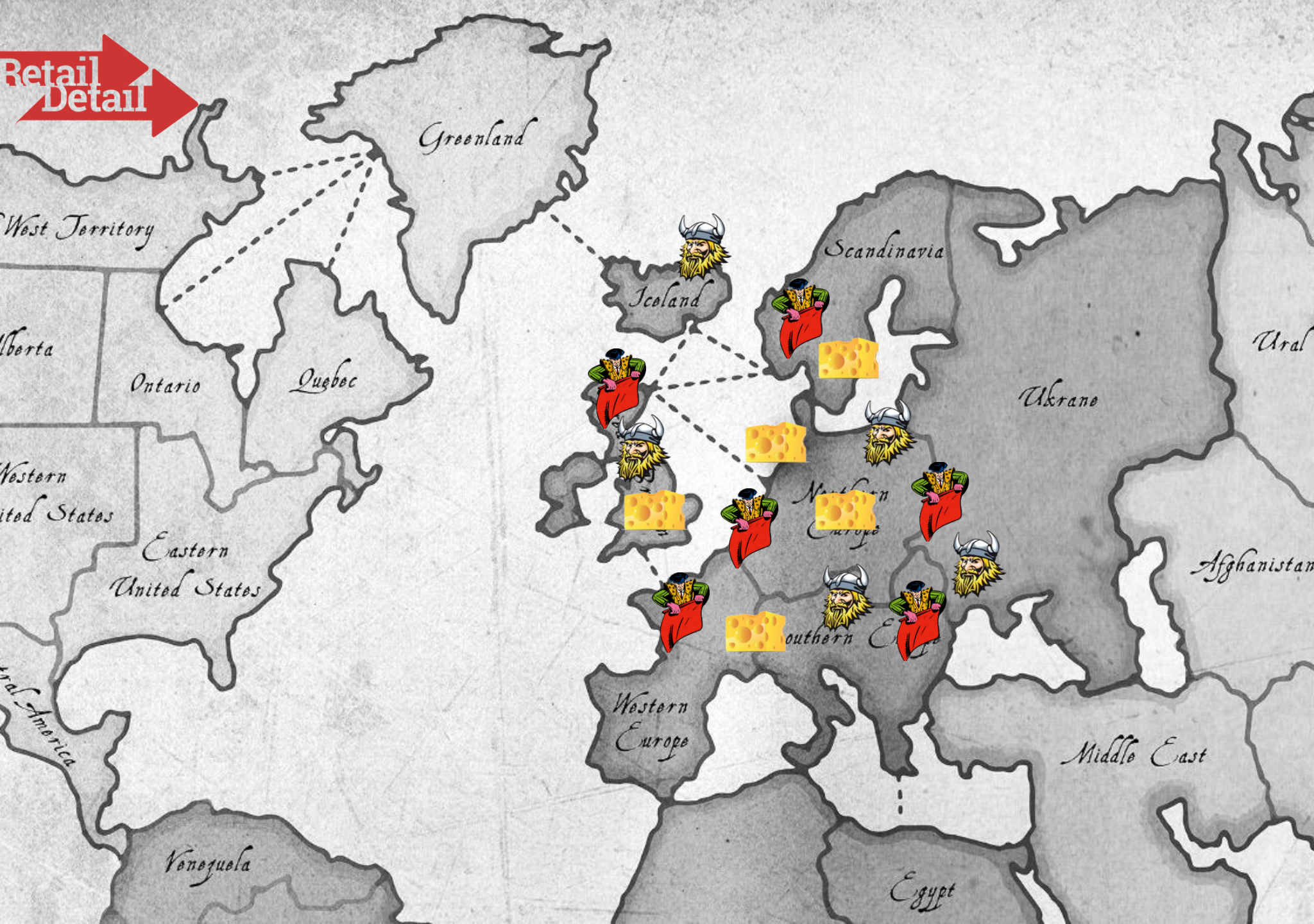
Turnover per m²

Real estate **portfolio**

Everything **standardized** /
The more **uniform** the better



**Retail
Detail**



 **Ahold**

BLOKKER

WE 

H&M 

JACK & JONES
VERO MODA

ZARA
Bershka
MANGO
SPRINGFIELD

Retail
Detail



NORTH AMERICA



zalando



腾讯
Tencent

樂R天

bol.com
zalando

Alibaba.com

Rakuten 樂R天

Tencent 腾讯

the
four

NEW BATTLEFIELD



CONCENTRATION OF POWER

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Sponsored
By **YOU**

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Copy -
Cats

IT'S A SMALL WORLD

Robot ???

Retail
Detail

Social sharing

Responsive

Interactive

Immediate availability
ON/OFF

Always on: hyper-connected

Price sensitive: buying ON/OFF

Technology driven

Real time

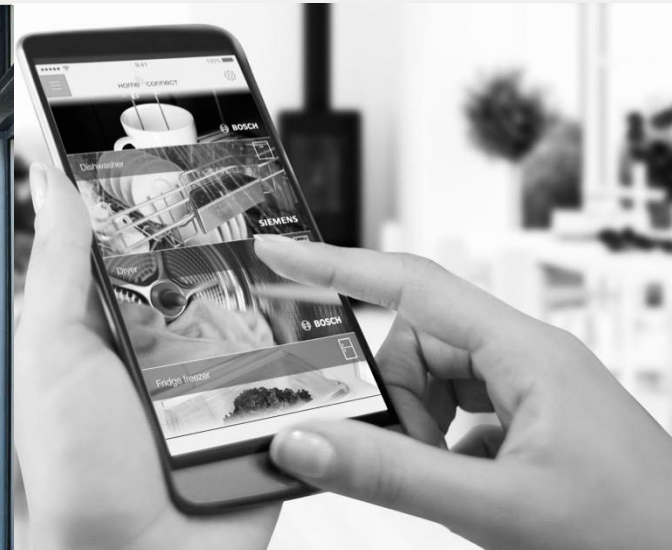
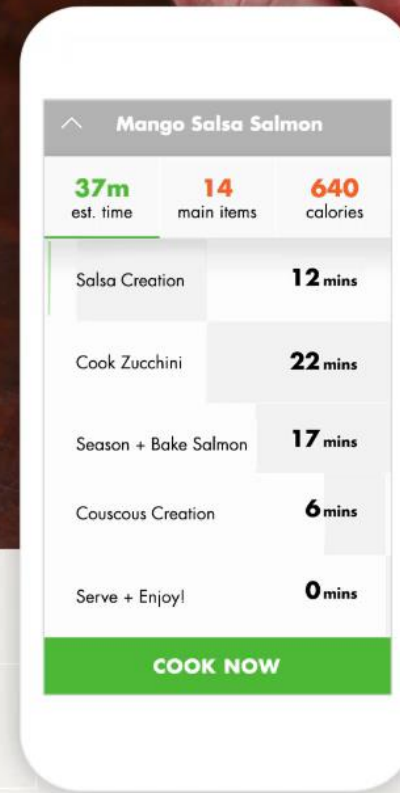
Sustainable & responsible

THE NEW CONSUMER
=> Phonosapiens

THE NEXT BIG THING

after your pocket
your **HOME & WALLET**

but, **VOICE** is the **NEW GOLD**





THEY...

KNOW who their customers are

TRACK what customers search, like and buy

ASSOCIATE you with customers just like you

RECOMMEND you products that their algorithms are sure you're most likely to be interested in



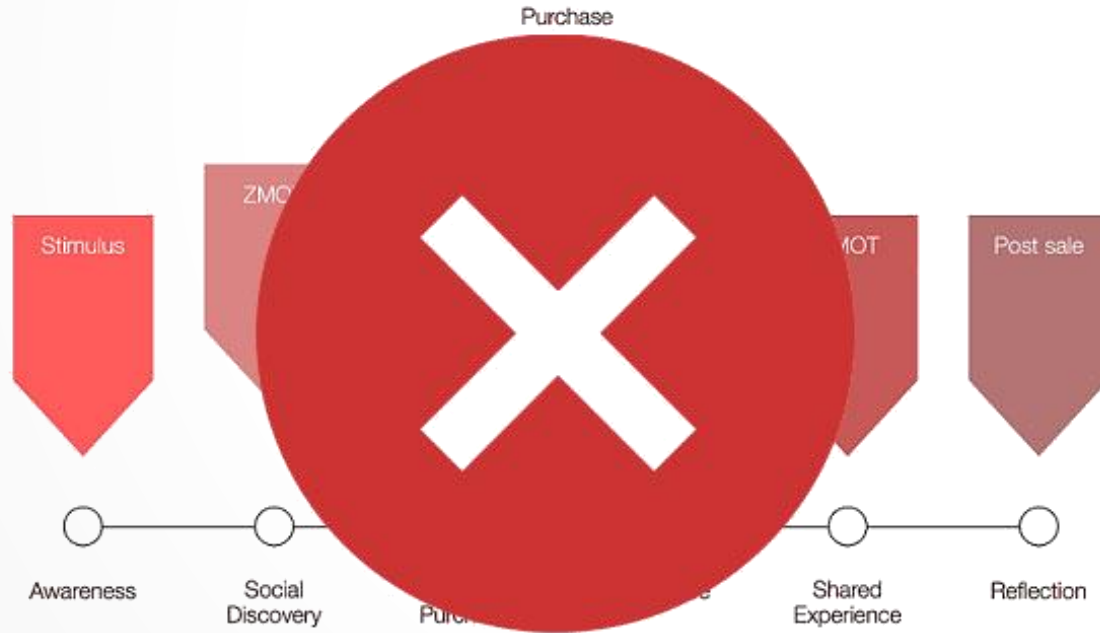
METAIL IS THE NEW WAY OF SHOPPING IN A OMNI-CHANNEL ENVIRONMENT



TAKING THE LEAD IN VOICE... AMAZON IS WINNING



WHAT HAPPENS NEXT?



What happens if
**BUYING IS
VOICE-DRIVEN**
instead of visual?

What happens to
consumer marketing
when purchases are
made automatically,
directly and **MACHINE-
TO-MACHINE?**

Retail
Detail

MACHINE-TO-MACHINE

**"IN THE FUTURE 40% OF ALL PURCHASES
WILL BECOME MACHINE-TO-MACHINE"**

Doug Stephens, Retail Prophet

A NEW GAME OF RETAIL

NEW CUSTOMER JOURNEY

Future of the consumer
Future of technology
Future of marketing
What about the store?

RETAIL IS A NEW BUSINESS

Everyone is a retailer
Retail is media
Retail is service

DELIVERY OF THE FUTURE

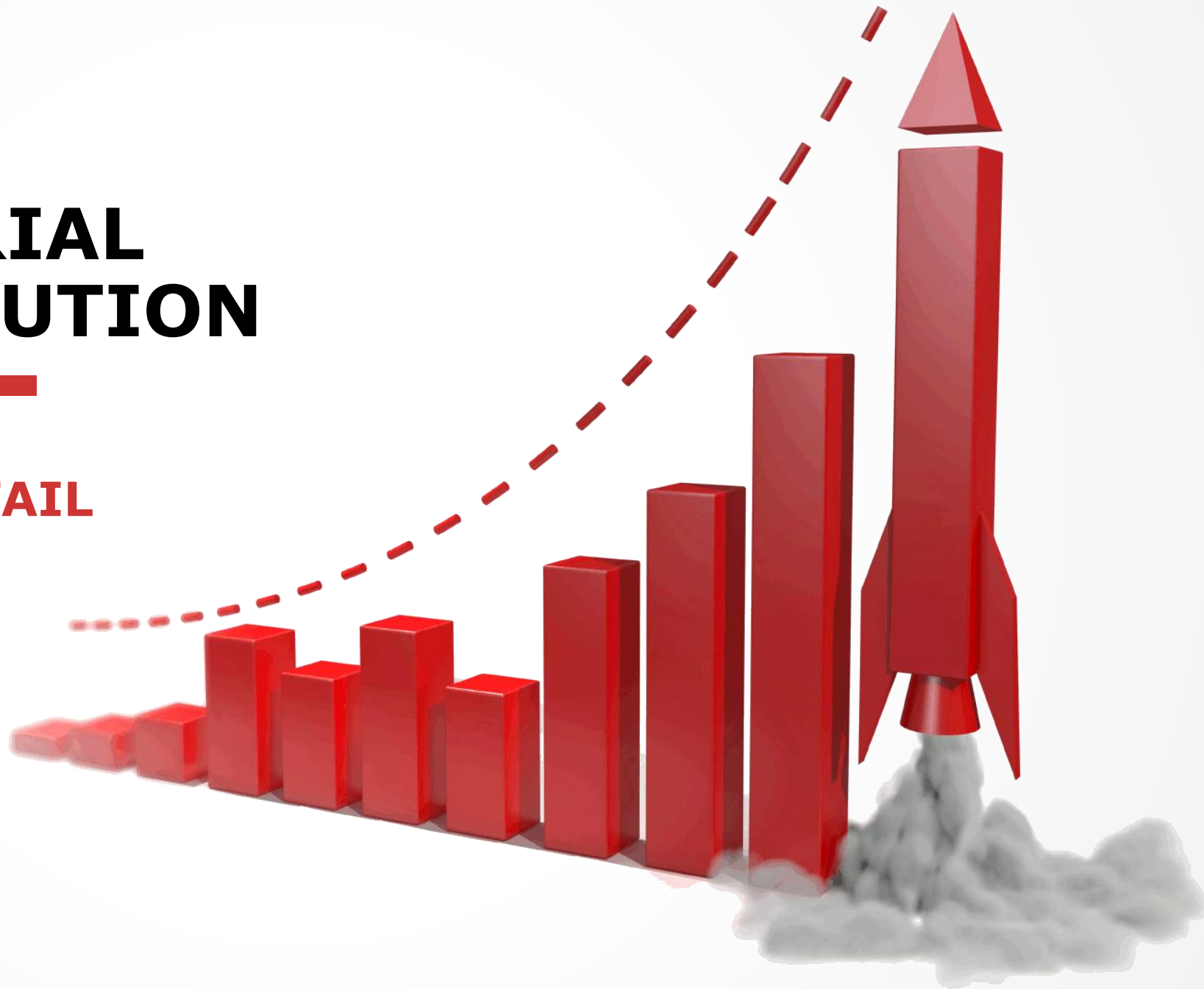


4th INDUSTRIAL REVOLUTION

THE FUTURE OF RETAIL

A hyper-connected,
globalized world leads to...

- Accelerating speed of change
- Platform economy
- A new customer journey
- Cutting the middle man



MEGATRENDS: CONNECTIVITY LEADS TO...

NEW CONSUMER

- Ageing
- Emerging markets
- Multiculturalism
- Urbanisation
- Single-person households
- Fast life vs slow life
- Sustainability & authenticity



MUSLIM CONSUMPTION

- Social consumers
- Bulk buyers
- Different holiday calendar
- Cross-border shoppers
- 24/7 consumers

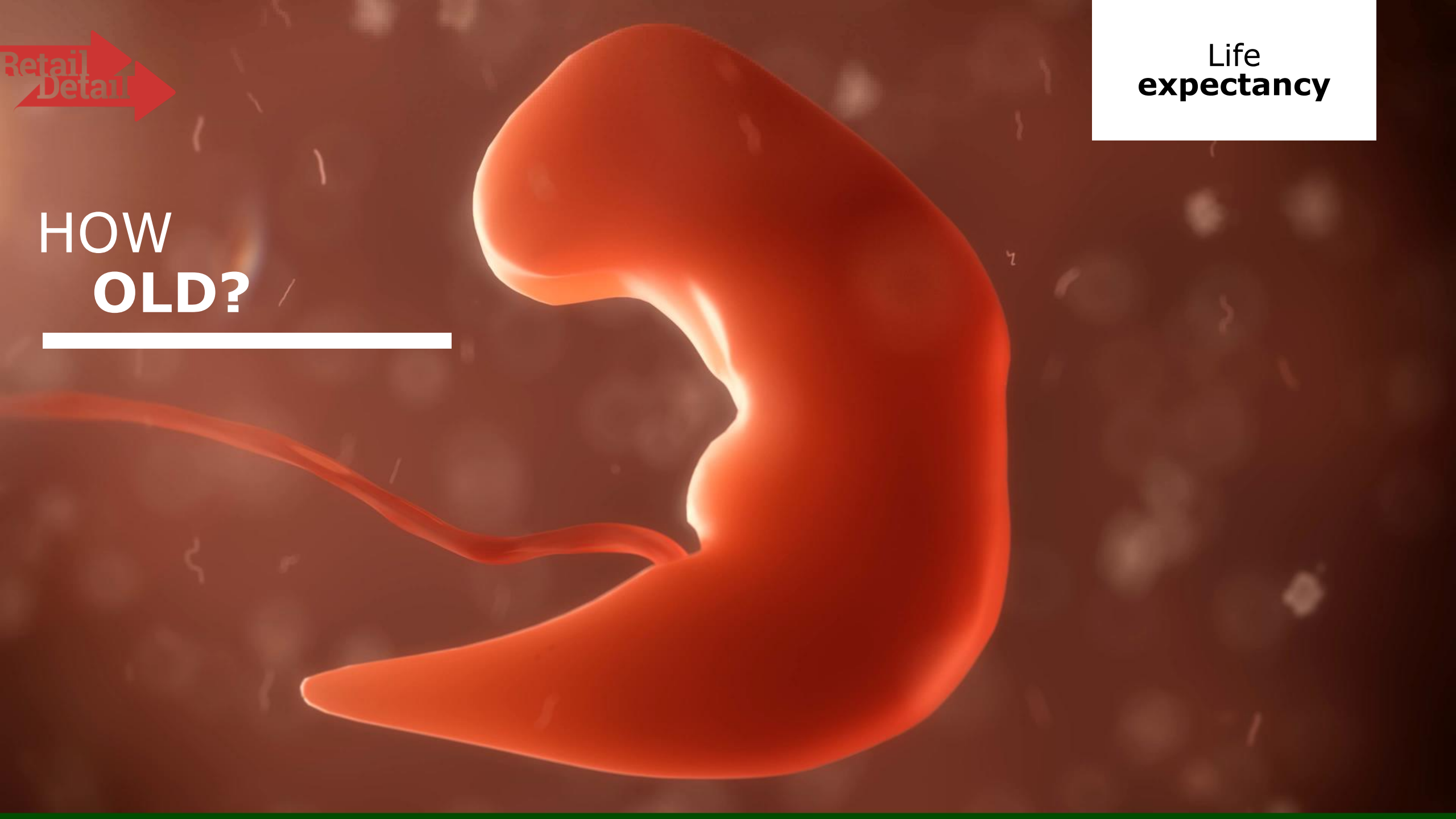






Life
expectancy

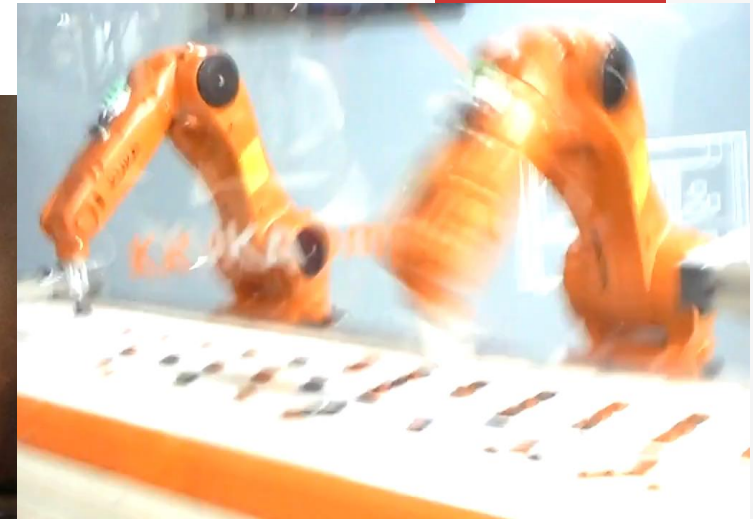
HOW
OLD?



MEGATRENDS: CONNECTIVITY LEADS TO...

NEW TECHNOLOGY

- Blockchain
- Cryptocurrencies
- Artificial Intelligence
- Robotics
- AR & VR
- Platforms



Retail
Detail

BLADES

Start with any razor for \$1. No hidden fees.



Direct !!

Million Dollar Shave club

Member
FAVORITE

THE HUMBLE TWIN

1ST MO.

\$1

FREE S&H

AFTER

\$1

\$2 S&H

THE 4X

1ST MO.

\$1

FREE S&H

AFTER

\$6

FREE S&H

THE EXECUTIVE

1ST MO.

\$1

FREE S&H

AFTER

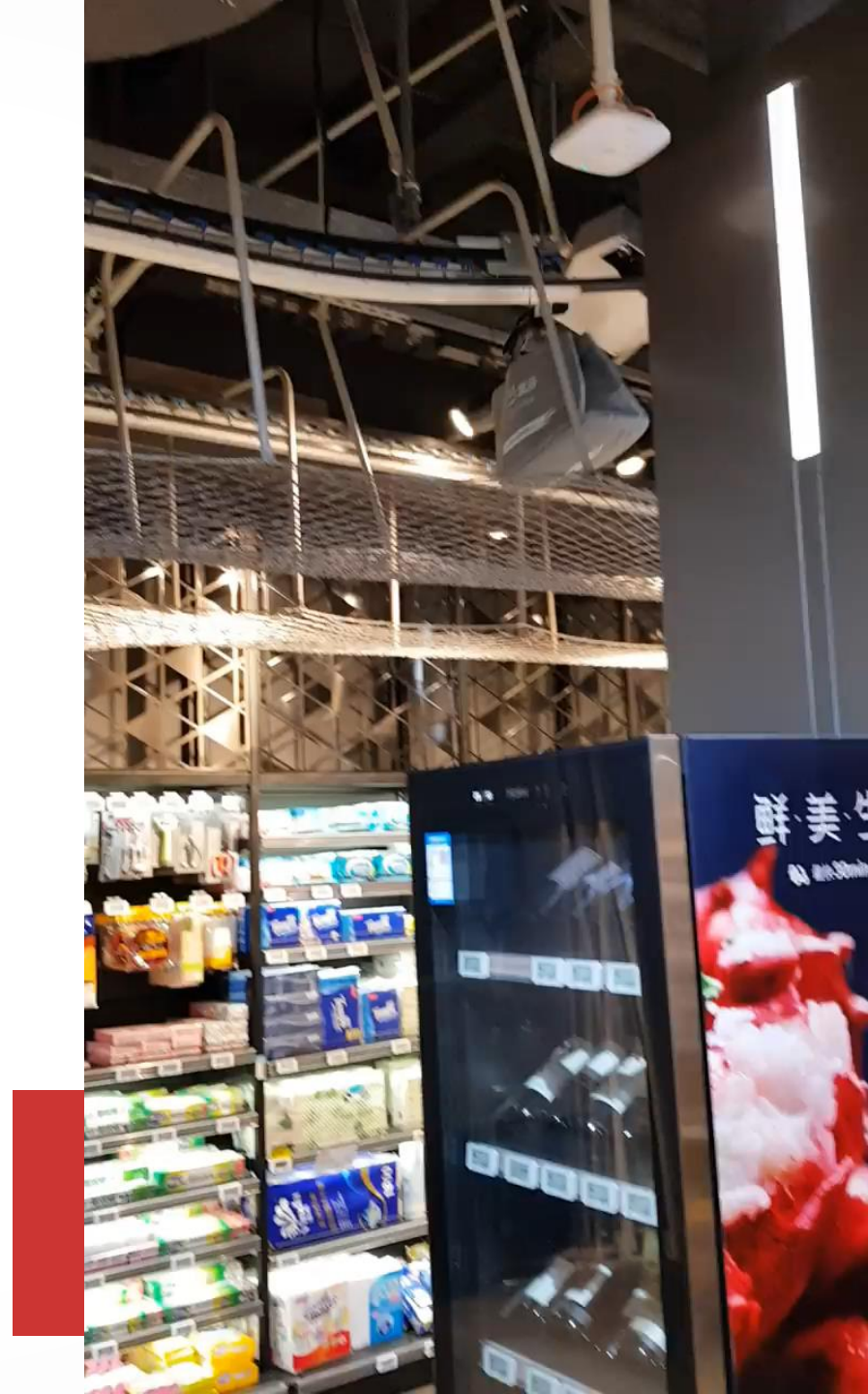
\$9

FREE S&H

MEGATRENDS: CONNECTIVITY LEADS TO...

NEW BUSINESS MODELS

- Experimental
- Bottom-up
- End of hierarchy
- Trial & error
- Re-inventing the old



INFOBESITY

Inability to absorb and process all the information to which we are exposed

INFORMATION FATIGUE SYNDROM (IFS)

Depression

Compulsion to stay connected

Poor concentration

Trancelike state

Burnout

Lower immune response

Hostility



H² CENTRIC

HUMAN-TO-HUMAN

is the ONLY way to beat
machine-to-machine





HOW TO **WIN AGAIN**

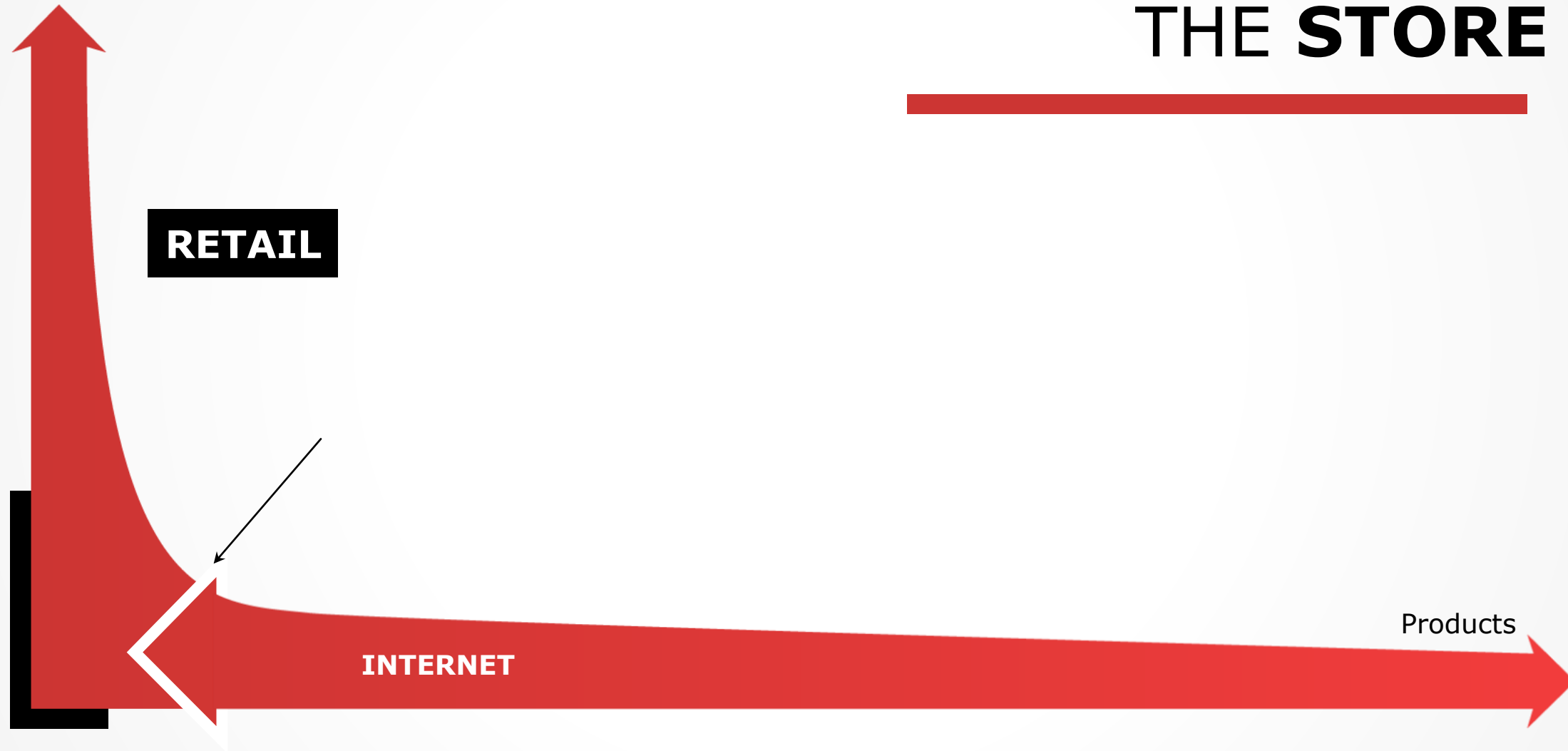
Retail
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THE STORE

RETAIL

INTERNET

Products



DEMOGRAPHIC ASYMMETRIES

GROWING WORLD
POPULATION



URBANISATION
& DENSIFICATION



**RISE OF ASIAN &
AFRICAN MIDDLE CLASS**



AGEING
SOCIETIES



GENDER GAP
DECREASE



WORLD POPULATION

Source: United Nations Department of Economic and Social Affairs, Population Division, *World Population Prospects: The 2015 Revision*
Produced by: United Nations Department of Public Information

PROJECTED WORLD POPULATION UNTIL 2100

1990  **5.3 BILLION**

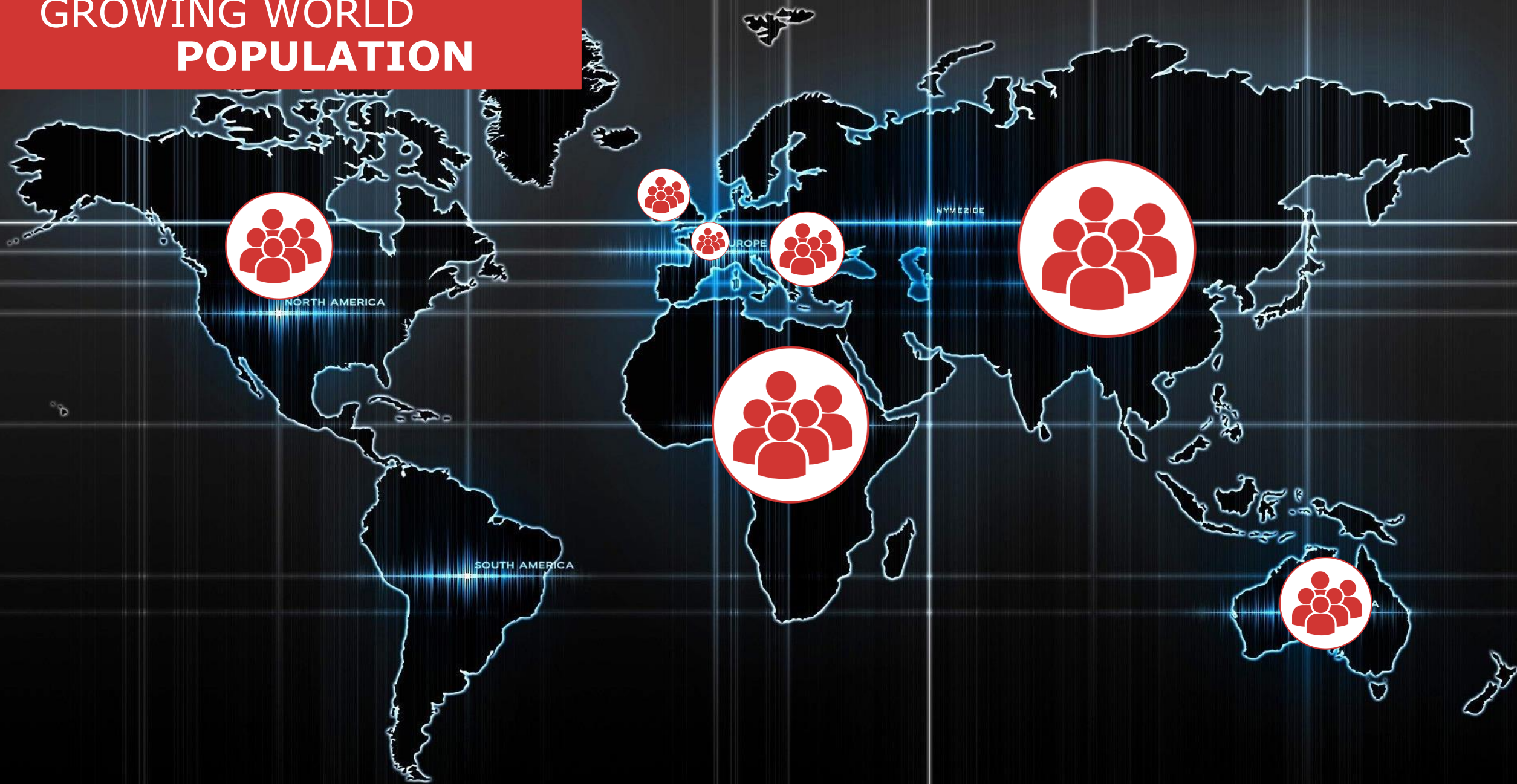
2015  **7.3 BILLION**

2030  **8.5 BILLION**

2050  **9.7 BILLION**

2100  **11.2 BILLION**

GROWING WORLD POPULATION





SCARCITY



BLURRING TOWARDS OUT-OF-HOME

FRYTEK ŚWIAT

ZAPIEKARNIA





PEOPLE



Barometer of trust





**WE ARE PEOPLE
NOT ROBOTS**

