# 2021

## Global Retail Trends & Innovations




Nº 16 | PRESENTED BY:

Ebeltoft Group
Global Brand & Retail Experts

# Ebeltoft Group
Global Brand & Retail Experts

We are a global alliance of retail and brand consultants with 18 members that are active in 20 mature and emerging markets.

With more than 25 years of experience and a vast global network, Ebeltoft Group brings together global expertise and local experts to assist retailers and brands to develop market relevant solutions. Since its founding, Ebeltoft Group has been analyzing global retail innovation trends. Since 2005, the Retail Innovation book has been part of our yearly publications. It focuses on emerging trends and the most interesting innovation cases worldwide.

Ebeltoft Group´s global studies and publications include:

- Global Consumer Report (2020)
- Consumer Trust in the Time of Covid (2020)
- Phygital Project (2019)
- Digital Impact to Retail (2018)
- Horizontal Retail (2017)
- Services at Retail (2017)

## AMERICAS

GRUPOGS& Gouvêa de Souza
J.C. WILLIAMS GROUP Global Retail Advisors
McMillan Doolittle

## ASIA-OCEANIA AND AFRICA

FRONTLINE STRATEGIES
FERNRIDGE
LOUKEN GROUP
RetailDoctorGroup
RXG Retail Wisdom

## EUROPE

ABS Architected Business Solutions
DIAMART GROUP
FUHRER & HOTZ Excellence in Retailing
GRUPPE NYMPHENBURG Brand & Retail Experts
inquiry MARKET RESEARCH
IMR Instituto de Marketing Research
KIKI LAB
KISSretail keep it simple & smart Management Consulting
pattern
Q&A
Retail Institute Scandinavia

Ebeltoft Group
Global Brand & Retail Experts

# Retail Innovation

Our alliance has the goal to improve awareness of global trends of the future retail landscape.



**With 15 years of experience in global retail trend analyses and more than 25 years of experience in our national communities around the globe, Ebeltoft helps retailers and manufacturers to prepare for upcoming trends and rapid changes.**

By studying and implementing innovative retail concepts and ideas, we are able to help our clients to adapt fast to the ever changing environment. It is easy to spot these changes when we reflect back on retail history. It is more difficult, but ultimately more important, to understand and react to these changes as they are happening now. By uniting our knowledge and insight, we are more powerful and better prepared to help our local clients. Ebeltoft Group members are experts in the following key concerns:

- What are the main game-changing ideas that are propelling retail forward?
- How does this apply to me and my local retail market?
- How can I incorporate elements of cross-channel retailing?
- How do I incorporate new technologies into my retail concept?
- How can I think about my business model in a new way?
- How can I blend the online and offline experiences?
- How can I increase the role that the customer plays in creating and determining products?

In addition to presentations and workshops, Ebeltoft Group also provides customized trend-tracking services for your company or retail sector.




# Retail never stands still

## Zooming in on the retail landscape of 2021

In 2020 the world has turned upside down. The Covid-19 pandemic led to major shifts within retail and transformed the way consumers shop like never before. Omnichannel integration to serve your customers the best way possible has shifted from being a point of differentiation to an absolute necessity. Due to lock downs and safety concerns, an immense push towards online shopping occurred, leading to a growing power of platforms and ecosystems. Convenience is key for customers and should be prioritized by all retailers. And even if the need for extreme experience in retail has shifted from physical experience to digital engagement, experience and entertainment will continue to be a significant consumer need. Lastly, another trend that accelerated by the pandemic is buying local and expecting social responsibility from retailers and brands. Therefore, offering sustainable solutions to customers is more important than ever before.

Change is here. Retailers must adapt to survive which will be a major challenge for everyone. But it is also an opportunity to reinvent yourself. The moment for innovation is now.

### TRENDS TO WATCH IN 2021

Ebeltoft Group has been monitoring brand and store innovations for more than a decade, uncovering trends both underlying and emerging in modern retail. Our retail experts around the world join forces to share insights from their local markets that will inspire you to innovate and prepare your business for future trends. We have evaluated 50 innovative cases from more than 15 countries, revealing four different retail trends to create a detailed big picture of 2021.

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# Award-winning Innovation Case

Canada

## Grocery Neighbour


PRODUCE
MEAT

Canada

# Grocery Neighbour

Grocery Neighbour is a new format grocery store where the store itself is on wheels. Each 18-wheeler will stock a variety of products including fresh produce, meats, fish, or local items such as bakery or specialty foods. Similar to how an ice cream truck cruises around a neighbourhood, customers can flag down the truck to stop by using an app. The app also allows customers to scan and pay for products, as well as track their local truck to plan their shopping basket.

As the fleet rolls out, Grocery Neighbour will be positioned to curate the selection of products to each neighbourhood it serves, partnering with local farmers, bakers, and butchers to provide only the freshest product. Furthermore, in-app checkout will grant insight into what customers are buying, so product assortments can accurately reflect the ethnic, cultural, or seasonal needs of their customers.

**KEY DATA**

**Country:** Canada
**Retailer:** Grocery Neighbour
**Format:** Mobile grocery truck



## WHY IS IT INNOVATIVE?

- **Personal preference**
  Fresh local products have exclusively been in-store products. Unlike grocery delivery, customers can choose their own produce just how they like it.

- **No contact, no waste**
  Using the app, customers can pay for their purchases without checkout lines. The ability to bring your own containers even when selecting produce reduces waste.

- **Driveway convenience**
  For customers working from home or without cars, this service offers the same benefits as grocery delivery - but without the hassle. No minimum orders, exact arrival times, and no delivery costs.






## Ebeltoft Group Expert Comment

Grocery Neighbour is the first of its kind, and the model can be expanded to include ready-to-prepare meals and more. Like a milkman service, customers are getting the freshest of the fresh from the comfort of their own homes.

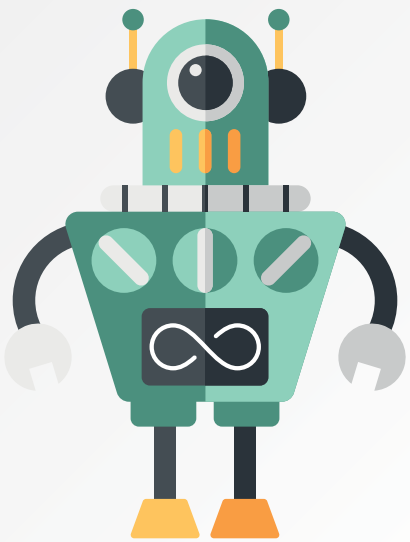
As homes get smaller and the space to store food also decreases, Grocery Neighbour can save customers a lot of time.

Trend #1

**OMNICHANNEL BRICKS AND CLICKS REDUCED FRICTION TECH INTEGRATION**

# Omni Integration

The emergence of Covid-19 speed up the need for technology adaptions and digital innovations that allow consumers to always be connected. They can shop, return, or share products anytime and anywhere at the touch of a button. Bricks and mortar and the online channel are no longer separate entities, but complementary platforms that improve the retail experience. Customers no longer distinguish between the physical and digital worlds. They want to be served at anytime, anywhere and through every channel. An omni experience encompasses everything from online to off-line experiences. With click and collect, augmented reality assistants, endless aisle, lockers, and data-driven stores, omni experience dominates retail today.



#1 OMNI INTEGRATION

United States

# Amazon Fresh

Amazon Fresh is Amazon's first grocery concept designed from the ground-up with the ambition to deliver a truly frictionless grocery shopping experience. Amazon Fresh features national brands, Whole Foods 365 brand and a large selection of prepared foods all at low prices. It offers 5% back to customers using the Amazon Prime credit card or Amazon Prime Store Card. In addition to food, the store carries a selection of general merchandise including a "Best of Amazon" wall which features a curated selection of best-sellers from Amazon.com. Additionally, Amazon Fresh debuts the "Dash Cart", which is equipped with technology that recognizes what shoppers drop inside the basket and allows them to check out without visiting a cash register.  Free same-day delivery and store pickup is available for Amazon Prime members.




**KEY DATA**

**Country:** United States

**Retailer:** Amazon

**Formats:** Store, Online, Mobile, Voice

**Website:** blog.aboutamazon.com/shopping/introducing-the-first-amazon-fresh-grocery-store

## WHY IS IT INNOVATIVE?

- **Integrate the Amazon Ecosystem**
  When customers arrive in store, they can access their Alexa shopping list through the Amazon app or on the Amazon Dash Cart, enabling them to quickly navigate aisles and check off items as they shop. Throughout the store Amazon Echo Show devices are available to ask Alexa for help.

- **Frictionless**
  Dash Cart brings extreme convenience to the Amazon Fresh experience. Customers simply place their bags in the cart, sign in using their Fresh QR code in the Amazon app, shop, and exit through the Dash Cart lane to automatically complete their payment. Dash Cart also allows customers to access their shopping list from their Amazon account and check off items as they go.

- **Multi-Purpose**
  Amazon Fresh can serve as a hub for other Amazon customer activities outside of grocery shopping like returns and package pickup that have nothing to do with grocery stores.




**Ebeltoft** Group Expert Comment

- Goes beyond traditional grocery, the store is a cross between a discount grocer (pricing), a traditional supermarket (merchandising), a Whole Foods store (PL program & prepared food) and Amazon fulfillment & service center.
- It serves as a hub for all Amazon customer activities outside of grocery shopping such as package pickup and returns.
- 20% of the space is dedicated to Robotic picked storage
- First brick and mortar store to deploy voice functionality. Customers can start their journey at home with their Alexa device and continue in Amazon Fresh stores.
- Blending national brands (such as Coca-Cola) with private labels from Whole Foods and Amazon

Germany

# C&A Hamburg Store

The fashion company C&A has equipped its store in Hamburg with state-of-the-art technology and fundamentally revised the store design concept to transform the store to their most modern in Europe. Changing rooms are equipped with touchpads, which customers can use to call service personnel for advice or to order an article in a different size or color into the cubicle. Via screens at Omni Touchpoints, customers are able to switch from the brick-and-mortar store to the virtual C&A shop and order sizes and colors, which are not available in the store.

The concept is complemented by a personalization service in the denim department, where customers can have their garments customized using laser technology.

This all takes place in an eco-friendly store, as it is equipped with energy saving screens and lighting. Furthermore, the usage of water is reduced to a minimum and sustainable cotton is chosen to produce the clothing.




**KEY DATA**

**Country:** Germany
**Retailer:** C&A
**Format:** City Store

## WHY IS IT INNOVATIVE?

- **Blurring Lines**
  Reduced frictions between channels via the omni touchpoints in the store, facilitating the transition between the physical and digital store.
- **Convenience is Key**
  The touchpads in the changing rooms allows customers to enjoy the most convenient shopping experience possible.
- **Make it Yours**
  The individualization service increases the customer's perception of being perceived as an individual being and promotes customer engagement with the brand.








**Ebeltoft** Group Expert Comment

C&A presents a convincing and successful example of omnichannel integration, which makes the customer experience more convenient and eventful, creating a true phygital store. The access to sustainable, customizable and fairly priced clothing provides an USP for the company in a modern way.

Romania

# Carturesti

## New partnerships between industries

Carturesti is one of the largest bookstores in Romania, pioneer in new retail concepts and innovations, values that emerged also during the pandemic, when the retailer was heavily affected by the lockdown. With all the locations closed and with an online sales channel generating only 10% of revenues, Carturesti reinvented itself and set some interesting partnerships with food retailers, launching "books' islands" in Mega Image concept stores and also making other products available on partners' online platforms, such as tea, chocolate, lifestyle accessories and gourmet products on vivre.ro website - online furniture retailer.




**KEY DATA**

**Country:** Romania
**Retailer:** Carturesti
**Formats:** mobile app/ desktop app

## WHY IS IT INNOVATIVE?

- In order to come closer to its readers during the lockdown, Carturesti decided to have its books in supermarkets, some of the few places that were opened and allowed customers inside.
- All the books in the supermarkets are wrapped in a plastic overlay for the safety of the readers.
- There are over 300 books from various domains of interest and for every age
- By having its products on vivre.ro, the retailer can also sell other products than books. This is important for the producers, since Carturesti is one of the main distributors for a lot of small local producers and designers. Vivre.ro was frequently visited during the pandemic since there was a trend of redecorating houses.










## Ebeltoft Group Expert Comment

Carturesti strategy is to always be where its readers are - street bookstores, shopping centers. And now, the pandemic revealed new ways to come closer to the client. No other place would have been more strategic during the pandemic than food retail chains, which were open and with a significantly increased traffic and number of customers' visits. In a hard period for books' industry, a book in our food basket can only bring joy and hope.

Brazil

# Delivery Center

## Digitalization of the shopping mall

Delivery center is a tech startup that provides a full-service platform (marketplace, payment and logistics) where retailers located in shopping malls can sell and fulfill online orders. The company was invested by the two largest shopping center chains in Brazil, joining forces to create a stronger ecosystem.

In order to offer a plug and play solution to digitalize shopping malls, the company combines several expertise and services:

Tech team: An experienced team to support retailers located in the malls to digitalize their stores (upload assortment, prices and commercial dynamics in the platform)

Logistic hub: composed by "shoppers" that collect the orders from the stores and a team that deliver them to the customers. They generally have a support area located in the parking lot of the partner mall.

Tech infrastructure: a full-service technological platform integrating marketplace, payment and customer data.

They are also expanding the reach of the retailers at shopping malls, Delivery Center recently signed a partnership with the biggest marketplace in Brazil to include the digitalized retailers by them in this marketplace.




**KEY DATA**

**Country:** Brazil

**Retailer:** Delivery Center

**Format:** Digital

## WHY IS IT INNOVATIVE?

- Solution to shopping malls to enter the digital channels
- Joint venture between traditional competitors in order to win in the digital world








## Ebeltoft Group Expert Comment

The shopping center industry all over the world is being pressured by the digital channels, Delivery Center is innovative solution for shopping malls to enter in the digital channels operating their own platform.

They are creating their own ecosystem for shopping malls offering a fast track and a simple plug and play solution to digitalize malls.

United States

# DoorDash Kitchen

A new offering from delivery platform DoorDash, DoorDash Kitchens is a shared commissary kitchen with multiple restaurants allowing for cross-ordering between merchants. Restaurateurs can rent out kitchen stations in a shared space to allow them to scale their takeout business without taking up room in a traditional dine-in location. DoorDash Kitchens works closely with each merchant, co-designing their spaces to customize the environment, storage and equipment to their specific needs. Each kitchen is staffed by employees of the brand using it, with DoorDash personnel handling janitorial services, delivery, and the handoff of meals in a common area for order pick-up.




**KEY DATA**

**Country:** United States

**Retailer:** DoorDash

**Formats:** Online, App, Physical Space

## WHY IS IT INNOVATIVE?

- **Integrated**
  DoorDash owns the supply chain and holds 35 percent of the food delivery market

- **Convention-Breaking**
  First third-party platform to launch one of these shared "smart" kitchens, offering access to their demographic data and demand mapping, down to the specific cuisine, for their culinary partners, helping restaurant brands enter new markets with limited risk due to limited capital expenditures (restaurant buildout, lower rent costs) and access to a detailed understanding of the market demand.

- **Community-Minded**
  Backing immigrant- and refugee-owned businesses through its Kitchens Without Borders initiative.



## Ebeltoft Group Expert Comment

- Works with both locally founded and national businesses to provide customized kitchen space for five restaurant operations that offer delivery and pickup services through DoorDash's app.
- Also handles marketing for partners.
- Gives its restaurant brands access to nearby markets for delivery and pickup with very little risk.
- Despite existing in a shared space, DoorDash Kitchen offers customized spaces based on the unique needs of each business

Spain

# Fashionalia

## Online marketplace opens its first phygital store

Fashionalia is a fashion marketplace with a clear value proposition for both fashion brands and customers:

- Fashion brands can show their latest collections at full price instead of selling forever discounted clothing from old seasons as in most marketplaces. Also, preserving each fashion brand image and positioning is a priority for the marketplace.
- Customers are part of a loyalty club that uses gamification techniques to make their benefits grow: the more a user buys and shares, the bigger the benefits: from personalized "VIP" prices –special prices available only for that customer and for a limited time- to curated recommendations or free shipping.

On February 2020, Fashionalia opened a phygital store where customers have the same online experience, with all their personal benefits, with the additional advantages of touching and trying on the clothing. The store shows collections from 30 premium brands and is fully connected blending physical and digital with tools like smart mirrors with RFID, large screens to access full online collection, QR codes to access product' specs and personal VIP price, personal shopper by appointment (booked on the app), and much more.




**KEY DATA**

**Country:** Spain

**Retailer:** Fashionalia

**Formats:** e-commerce + phygital store

## WHY IS IT INNOVATIVE?

- **First omnichannel marketplace of seasonal fashion.**

Fully integrated omnichannel experience allowing customers a seamless interaction with products, personal shoppers, smart fitting rooms, access to Fashionalia full online catalogue, as well as mobile payment via its app while in-store.

- **Personalized shopping experience**

Using the app in store, the client has access to the same benefits as online: personal VIP prices, free delivery, personal recommendations or exclusive sales/events.

- **Next generation of fitting rooms and kiosks**

Smart mirrors connect product and offline shopping cart with shopper's mobile, via RFID, QR and the app. The buying process is very easy, allowing to browse and buy online directly from fitting room or sales floor, and/or have it delivered home.

- **Efficient business model**

Fashionalia is a drop-shipping model, integrating the brands' online shops, who make the deliveries and thus minimum stock is needed. The phygital shop has 30 corners of premium brands, which are changing to make it dynamic.









## Ebeltoft Group Expert Comment

A smart physical store in coherence with its online marketplace strategy: multi-brand offering with in season collections and increasing benefits for loyal customers.

The innovative platform and customer's buying process tracking allow a high degree of personalization to be achieved while in the physical store.

United States

# FORUM by b8ta

b8ta specializes in creating multi-brand retail spaces, particularly DTC brands that do not have much of a retail presence. Forum is focused on fashion and beauty. B8ta takes a flat monthly fee, and the brands take the full percentage of their profits. Forum aims to become a go-to place for brands that want to experiment with physical retail but don't have the capital or resources to have their own physical space.




**KEY DATA**

**Country:** United States
**Retailer:** b8ta
**Formats:** Online, Store

## WHY IS IT INNOVATIVE?

- **Data-Driven**
  B8ta's software includes checkout, inventory, point of sale, inventory management and staff scheduling services, plus metrics like the number of guests that walk by a product, time spent browsing, and how often a piece goes into the dressing room

- **Tech-Enabled**
  RFID allows adjustments to the backdrop of dressing rooms according to a brand's aesthetic and enables visitors to read about the brands and products, and use in-room digital displays to request items to try on.

- **Accessible Brand Experiences**
  Forum allows brands that traditionally haven't operated stores to quickly set up new physical operations. "Retail partners operating within Forum can design their own space and have creative control to curate experiences for consumers. This includes product launches as well as community, influencer and VIP events designed to help retailers bring their brand ethos to life for individual Forum shoppers" (Retail Touch Points)





## Ebeltoft Group Expert Comment

- Retail-as-a-service, the space features an evolving set of items from local or sustainable brands
- A physical location where shoppers can discover new products and brands in a space curated by the maker
- Combines the ease of shopping online with the lingering and discovery of shopping in a physical space

Australia

# Litmus Lab

LiTMUS Lab excels in playing with human nature to discover new things. There are plenty of companies out there that try their best to bring innovations to their customers' homes, but Litmus Lab does something different - something that helped the brand establish itself as a leader in the field. What's even more interesting is that this is an e-commerce business with a physical front, and it has succeeded in combining both retail worlds.

Their physical stores are profiled as "shop in shops" and located within Myer stores in Melbourne and Sydney and expanding to other major cities as we report. LiTMUS Lab is Australia's leading 'Retail as a Service' company, offering world-class retail placements for selected innovative brands and products. Our unique retail landscapes fuse digital & physical retail, with engaged & highly trained staff, and your content delivering elevated consumer experiences.



**KEY DATA**

**Country:** Australia

**Retailer:** Litmus Lab

**Format:** Technology – shop in shop concept

## WHY IS IT INNOVATIVE?

- **Disruptive 360-degree customer experience**
  This takes prospective customers on an exciting journey. All customers that visit Litmus Lab stores have a chance to try out the products and this is exactly what drives excitement. Litmus Lab employees are well-trained, and they know how to take customers into a virtual reality experience. There are no hard-sale efforts whatsoever, they engage with customers, and the team are there to answer any questions no matter how complicated.

- **Employment strategy that makes a difference**
  Training at Litmus Labs starts from day one. First of all, the hiring process targets individuals who are passionate about new tech and home products, digital gaming and online experiences.
  Secondly, Litmus Lab covers each product with a video, which are completely voluntary for employees to watch and learn everything there is to know about the products they are selling. This makes answering customers' questions a lot easier.

- **Using innovative products to attract the attention of modern consumers**
  Invoking excitement and desire in customers is easy, at least according to the Litmus Lab team. The company is using innovative products to attract the attention of modern consumers. But this is just one of many things that differentiate Litmus Lab from other similar companies on the market. Litmus Lab seamlessly manage physical and digital retail so that the customer experience is the same from both points of contact. Litmus Lab leverages the fact that we live in a smartphone era. The company features products that run off a smartphone app. Both Android and iOS products are supported. And finally, Litmus Lab products have to possess the ability to take people into a virtual reality state.






**Ebeltoft** Group Expert Comment

Litmus Lab seamlessly manage physical anddigital retail so that the customer experience is the same from both points of contact.Litmus Lab leverages the fact that we live in a smartphone era. The company features products that run off a smartphone app to not only increase engagement but keep a consistent offering. Litmus Lab train their employees specifically on how to take customers into a virtual reality experience to excite and deliver a truly unique experience.

United States

# MAC Innovation Lab

MAC Cosmetics was founded with the mission to provide professional quality cosmetics products directly to the consumer and today, is one of the world's leading makeup brands. Their newest store concept, the MAC Innovation Lab, integrates the best of both the digital and physical retail worlds to deliver a unique beauty experience powered by AI. Customers can customize their own palettes, personalize product packaging, and virtually try on makeup shades or even entire looks created by MAC makeup artists.




**KEY DATA**

**Country:** United States

**Retailer:** MAC

**Formats:** Store, Online, Mobile

## WHY IS IT INNOVATIVE?

- **Digitally Enabled**
  Technology allows customers to sample products without ever touching their face.
- **Localized**
  Customers can try on makeup-artist created looks virtually. Each virtual look is created based on what's trending and popular near each respective store.
- **Frictionless**
  Visitors can easily save looks and products trialed in-store on their mobile device for easy purchase from home.
- **Personalized**
  Customers can customize everything from products to product packaging.






**Ebeltoft**
Group Expert
Comment

- Each in-store experience is based on community and a feeling of hyper-local branding
- Seamless blend of physical and digital retail playing to the strengths of each channel. The physical store is a space for experience and community-oriented storytelling while digital tools enable product discovery and frictionless payment

Brazil

# Magazine Luiza
## Business Ecosystem

Probably one of the most integrated and innovative omnichannel retailer in the world, a very strong business ecosystem being created apart of the obvious regions – United States and China.
Founded in the countryside of São Paulo state in Brazil, Magazine Luiza is a Durables retailers that is leading retail transformation in the world. With + 1,100 stores, e-commerce and market place, the retailer positions itself as a digital company with physical stores and heart.

Known for the quality of their service and customer care, the company is still nowadays recognized to have a very strong culture, great customers service and for several years in a roll leading the Great Place to Work rank.

Since the early days of the internet, the physical and digital operations of the company were born integrated and taking advantage of the strong aspects from each channel. In 2012, Magazine Luiza, was founded. A technology and innovation center devoted to support the digital transformation of the company with more than 1,100 employees in 2019. The company is building a strong ecosystem combining the physical stores, strong digital channels, marketplace/vendors, customer data, proprietary and broad logistics infrastructure, services, digital payment, among other.

Magalu in now aiming to power their technology, systems, infrastructure and logistics to small and medium retailers.



**KEY DATA**

**Country:** Brazil

**Retailer:** Magazine Luiza

**Formats:** Stores and Digital

## WHY IS IT INNOVATIVE?

- MANY new initiatives being implemented: social sales, digital content creation, integration of digital and physical marketing using customers mobile phones, opened their marketplace for individuals and small retailers to sell during covid, a huge focus on human sustainability and equality (gender, race, social class, etc.)










**Ebeltoft** Group Expert Comment

Magazine Luiza is quickly becoming one of the most innovative and relevant retailers, inspired by the North American and Chinese ecosystems, they are creating their own vision of how an ecosystem should be, an extremely strong and diverse network of business that is scaling in a fast pace through development of new ventures and company acquisitions to complement their offer.

The company is now the leader in durables in Brazil, completely integrated in physical and digital channels and digital sales already represents more than 50% of their revenues.

Their innovation lab (Luiza Labs) to develop and implement technology with more than 1,000 employees is a key aspect to be faster than competition and to lead the digital transformation of retail.

United States

# Walmart+

Walmart+ is a new subscription service from Walmart that grants subscribers free unlimited delivery, discounts on fuel, and mobile scan and pay through the Walmart app. The subscription includes both store-to-home delivery as fast as same-day (minimum order value of $35) and free next-day or two-day shipping from Walmart.com. As the membership plan rolls out, Walmart plans to add more perks to the service.

By itself it is simply a subscription shipping service, but it represents a new era of Walmart stores: stores with electronic shelf labels, shelf scanners, cameras, and other electronic equipment to facilitate ease of cashierless and touchless shopping. In terms of grocery delivery, this service is first-of-its-kind, a distinct line separating "old" and "new" retail.




**KEY DATA**

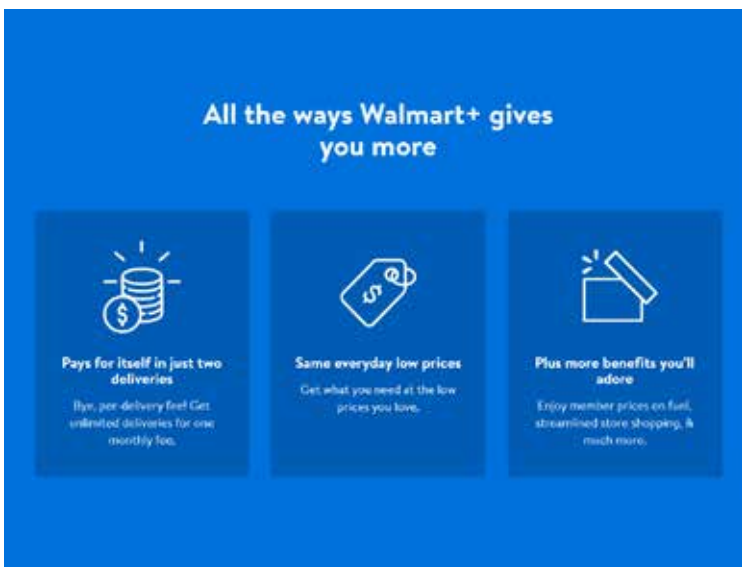
**Country:** United States
**Retailer:** Walmart
**Format:** Subscription service

## WHY IS IT INNOVATIVE?

- **Get anything delivered**
  Unlimited free delivery for when customers don't want to be in-store saves time, but Walmart's expanded selection of products puts it ahead of just grocery delivery.

- **Amazon vs Walmart**
  Walmart is one of Amazon's top competitors, and Walmart+ is definitely aimed at Amazon Prime. Through price matching, Walmart+ customers can get the same prices on products carried by Amazon – and since Walmart+ is currently more affordable than Amazon Prime, they are saving money as well.

- **Brand loyalty**
  In the same way Amazon Prime encourages customers to purchase on Amazon to "get their money's worth," Walmart+ will drive a similar sense of brand loyalty.







## Ebeltoft Group Expert Comment

Walmart Plus is the first direct competitor to Amazon Prime and comes at a time where online shopping is at an all-time high.

It represents a new era of subscription services, something that is likely to become more and more commonplace as driving in-store footfalls becomes more challenging.

Italy

# Würth Automatic Store

Automated hardware store opened in 2020 in Verona. Consists of 12 sqm with 2,000 skus on display and 6,000 additional products in inventory.

The space is technologically advanced with smart shelves, robotic arms, real-time inventory on-hand visibility and digital payments supported. This is the first 24/7 hardware store in Italy and during the COVID-19 pandemic, they stepped up to meet the needs of social distancing. Winner SMAU prize 2019.

**KEY DATA**

**Country:** Italy
**Retailer:** Würth
**Format:** Hardware store



## WHY IS IT INNOVATIVE?

- **Offline-online integration**
  Customers can purchase from the app or online and pick-up in the store by entering or scanning a unique QR code. Customers can also purchase via touchscreen catalog

- **'robot shop'**
  With electronic handling platform, use of QR codes, codes and cameras for product picking and delivery;









## Ebeltoft Group Expert Comment

Automated store that is open 24/7 to serve customers seeking flexible hours. The automated system reduces both overall costs and restocking times. The merchandise mix is optimized via real-time inventory monitoring and sales data.

Spain

# ZARA In-Store Mode

## Digital features to enhance physical shopping

Global fashion retailer ZARA has added a new functionality to its app called "In-Store Mode". It has been launched in September 2020 in the stores of some Spanish cities. The "In-store mode" has several functionalities to make shopping easier, safer and more sustainable:

- Online shopping from the selected store's stock and pick it up in 30 minutes, to avoid queueing and speed up the visit.
- Locate any product you have seen online (or search on the app by picture, by code or by voice) while instore. The app shows a map of the store indicating the area where the product is currently displayed.
- Book a fitting room from the app while being in the store. A special treat for loyal customers and a much-needed feature in coronavirus times to avoid queues and crowds of people.
- Electronic tickets. The app produces a QR code and when shown to the cashier, the electronic ticket is saved on the phone, eliminating the need to print tickets. All tickets are always stored in the app in case of need.




**KEY DATA**

**Country:** Spain

**Retailer:** Zara

**Format:** Integration of App and physical store

## WHY IS IT INNOVATIVE?

ZARA "in-store mode" encompasses new digital functionalities on the app to enhance the physical shopping experience, providing:

- **Safer and fast shopping**
  Shopping directly from the nearest store's stock allows the customer to avoid queues or crowds, and yet get the products in 30 minutes. Leaving the decision of how to best spend their time to the customers: either less time at the physical store or using it for more inspiration.

- **Easier shopping while instore**
  The customer can consult collections available, can easily locate specific products in the store, can book a fitting room and continue browsing, have easy access to all previous electronic tickets when needed, and has localized and updated clothing coordination proposals for inspiration that is instantly accessible.

- **Sustainability**
  Within their ambitious sustainable action plan, the e-ticket contributes to eliminating the need to print paper tickets and in a way that is also a convenience advantage for the customer.







## Ebeltoft Group Expert Comment

ZARA continues innovating, in this case showing some initiatives for the future of physical retail: an improved physical shopping experience by integrating and using new features on its app while the costumer is in the store.

Those innovative solutions have been inspired by listening and deeply understanding consumers' new omnichannel shopping habits, giving response to those clients who like to shop offline but with some of the convenience of digital. It seems the right evolution of shopping because it is customer centric; using innovation and tools to better serve the ZARA customer; how, when and where he or she wants.

Trend #2

**SEAMLESS RETAIL TECHNOLOGY REMOVES FRICTION**

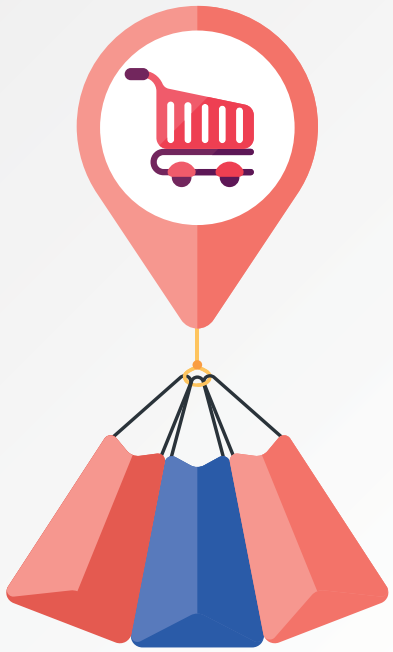
**ELIMINATES PAIN POINTS ON-DEMAND**

# Extreme Convenience

The modern consumer is busy, and the era of seamless, frictionless retailing is here. Due to the pandemic the customer wants to shop faster and more efficiently than before. Friction is every barrier we put in place to prevent customers from buying a product. Retailers are removing friction from the experience by adding elements of technology, subscriptions, delivery, and pick-up, while also streamlining the key elements of everyday operations.

- Safety, fast shopping and convenient one-stop-shopping is getting more and more important
- Retailers are leveraging technology to expedite services and create a seamless experience.
- Offering customer service online is a hot topic since 2020
- Pick-up locations are popping up around the world to get items in customers' hands conveniently and quickly.
- Barriers — ordering, checkout, product availability — are removed through technology advancements.

#2 EXTREME CONVENIENCE



ON

#4

Poland

# Mago Clever

With the “Clever” mobile self-service checkout, Mago has developed a trolley with which the customer can carry throughout the entire retail shopping process, from product selection to self-scanning and payment. The customer activates a trolley by connecting the mobile phone to the trolley with a QR code and attaches his own shopping bag. Using the scanner on the trolley, the customer can scan the selected products, see details and the price of the products, as well as other product recommendations from the store. Even an age check for the purchase of products such as alcohol is made possible through technology. Fresh products are weighed directly in the shopping bag using a built-in scale. For the payment, the customer has the choice to either carry it out via mobile phone or via one of the self-checkouts in the store.




**KEY DATA**

**Country:** Poland

**Retailer:** Mago

**Format:** Store Checkout System

## WHY IS IT INNOVATIVE?

- **Time saving**
  There are no waiting times for the customer in the checkout area, the customer can leave the store immediately.
- **Efficiency**
  Shopping is quicker and more efficient – the customers does not have to repack the article, but only put them in their bag once.
- **Revenue boosting**
  The retailer can display promotional information on the LED screen while they make their purchase decision. This can further fill the customers' shopping basket with predefined cross- and upselling scenarios.
- **Reducing contacts**
  Minimized contact of customers and store personnel for more safety – for example during during pandemic situations.



**Ebeltoft**
Group Expert Comment

Mago's mobile self-checkout system combines the advantages for retailers and consumers. In addition to the provided convenience for the shopper, retailers can minimize their operational costs for personnel and benefit from up- and cross-selling opportunities. The revolutionary design reinvents the shopping cart to perfectly match today's times.

France

# Monoprix

## “Grand Magasin pour tous”

Monoprix is a leading convenience store chain in France. Through its new 5 600 sqm project “Grand magasin pour tous”, Monoprix aims at becoming a destination store attracting all Parisians.
The goal is to give value back to the product, the store and the merchant by focusing on improving customers’ experiences in store remaining a place where quality goes with great prices.
In this hybrid format, Monoprix offers a selection of products and services that resonates with the consumption patterns of urban consumers: one area is dedicated to a healthy lifestyle where all yoga, healthy snacking and well-being products are exposed while another space is dedicated to food with a bakery, a caterer, a fish and meat market.
Also, customers can find a ‘relaxation area’ where to have coffee, lunch or just relax and in the middle of the store : here, a 150 sqm public square is built to become a meeting place.
Sustainability is also addressed through partnership with Selency to offer second-hand decorative items in the home department.
As for digital integration, for some time now the brand has provided fast delivery and Click & Collect services and goes further in efficiency by introducing connected shopping carts (partnering with the start-up KNAP) where customers can scan their products and pay them directly on the cart shelf.

**KEY DATA**

**Country:** France
**Retailer:** Monoprix
**Format:** City Store






## WHY IS IT INNOVATIVE?

- **Efficiency**
  - Connected carts for speed checkouts
  - Refrigerated area for home delivery carts
  - Same day home delivery
  - Click & Collect service
- **Sustainability**
  - Responsible commitment through second-hand items
- **Format**
  - 5 600 sqm convenience store with take-away food, home department and relaxing area









## Ebeltoft Group Expert Comment

"Grand magasin pour tous" to be understood as "The large store for all" is the redesign of the convenient store by Monoprix with « everything » under one roof in the heart of the city, without being a supermarket or a store dedicated to an elite .

Finland

# Box by Posti

"Box" is a bright and modernly decorated self-service postal point, where Finnish consumers can pick up their online orders. It is operated by the Finnish postal service Posti and the purpose is to be the "perfect place" to pick up online orders. Box is not only a hassle-free pick-up spot, but it also offers other convenient services, e.g. a recycling area, a product show-space and fitting rooms. Rows of pick-up lockers makes the experience convenient and quick, and customers can easily return their orders. The consumers can try on what they bought online, right there on the location in the fitting rooms, and if they wish to make a return, they can save time by packing it up in the free packaging provided in the space and return it right away using digital kiosks. Additionally, Box offers the possibility to sit and grab a coffee, as well as an area that can be used to host company events. Each area of service is marked with a special color to make it easy to navigate the space. Further, brands have the opportunity to showcase their products in "Box", offering them a way to increase brand awareness as well as functioning as a part of the business model for Box.



**KEY DATA**

**Country:** Finland

**Retailer:** Posti

**Format:** Multi-functional postal office

## WHY IS IT INNOVATIVE?

- **Eliminating pain points**
  Box is offering the customers the convenience of online shopping while relieving them of one of the biggest pain points of online shopping: the return.

- **The missing piece**
  It is a service that makes it easier for consumers to asses their online buy without having to return home.

- **Sustainability**
  Customers are able to recycle packaging from their order.

- **Brand opportunities**
  Brands can showcase products at the collection point.










**Ebeltoft** Group Expert Comment

The concept offers a great way to deal with the pain points of online shopping as Box is created to be the missing piece between online shopping and the home.

Canada

# RC Coffee Automat

RC Coffee's automated kiosk is a new concept that challenges customers' perception on convenience coffee. It provides the quality, authentic, and personalized experience normally associated with a premium café (think long lines and wait times) and adapts it into a fast, contactless experience for on-the-go beverages.

Using an app, customers can save favourite drinks, pre-order their pickup, and pay for their order. The app also uses location tracking so that the kiosk begins making your order when you get in the vicinity of the station, ensuring that your beverage is the right temperature and ready on arrival.




**KEY DATA**

**Country:** Canada
**Retailer:** RC Coffee
**Format:** Automated coffee kiosks

## WHY IS IT INNOVATIVE?

- **Perfect, every time**
  Once you get your blend exactly how you like it, simply save the order within the app. Without human involvement, your perfect cup of coffee will be made exactly the same way, every time you order it.

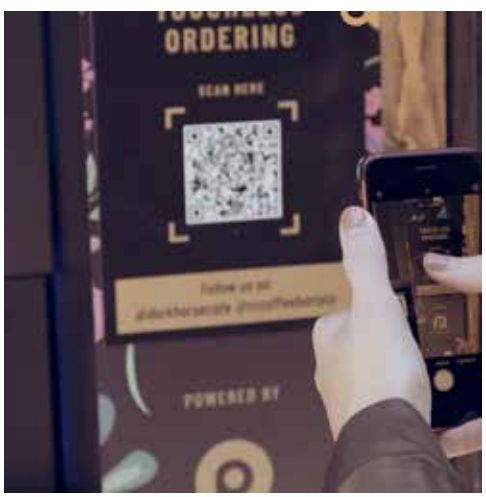
- **Quality coffee without the wait**
  The kiosks employ the Eversys Cameo espresso machine, which takes fresh beans and grinds them on site – all under 2 minutes.

- **Familiar coffee, new technology**
  Playing on the cafe experience, the kiosk has a faux storefront decorated like a retro café, mixing the modernity of the coffee robot with the classic aesthetic of coffee. They have also partnered with familiar favourites Dark Horse and Detour Coffee Roasters.








**Ebeltoft** Group Expert Comment

RC Coffee the first extremely convenient coffee offering in Canada and may spark imitators as fully contactless services become more popular.

Typically, convenience coffee is not renowned for its quality or personalization. This model takes that expectation and turns it on its head.

Germany

# Retail Cart

A mobile sales solution by Umdasch the Store Makers. On the chassis of electric vehicles, completely mobile sales areas are designed to match the related product, brand or environment (e.g. to match the airport or duty-free store).

Retail Carts are equipped with all the standard functions that can also be found in brick-and-mortar stores, such as POS terminals, display shelves and roller shutters. Even the shape and size of the vehicle can be adapted to the specific audience it is supposed to cater towards (e.g an airplane style for airport customers). The driver of the Retail Cart is also the merchandiser of the eco-friendly retail solution. Goods and other value items can always be protected by the integrated roller shutters of the vehicles, should the driver be temporarily unavailable. With a maximum payload of 1.361 Kg, a range of 48 Km and a top speed up to 19 Km/h, Retail cart is a uniquely versatile retail solution.




**KEY DATA**

**Country:** Germany
**Retailer:** Umdasch The Store Makers
**Format:** Mobile Stores

## WHY IS IT INNOVATIVE?

- **Adaptive**
  The design of the retail cart is individually customizable and can be adapted to the brand or the corresponding store design.
- **Ready for Take-Off**
  Especially useful in large airport environments, with customers on-the-move and in haste.
- **Variety of Uses**
  The Retail Cart is a multifunctional and very flexible sales solution. The shelves are movable and can be adapted to different products or promotions.









## Ebeltoft Group Expert Comment

Retail Cart enables a more targeted response to the demands of travel retail. Customers expect the brand or product of their choice to find them at their location, rather than having to search the goods in multiple stores and locations. With the extreme adaptability of the shop, Retail Cart manages to deliver a fitting wow-factor to every situation which requires a store.

The Netherlands

# SPAR mini market

SPAR is a supermarket chain that mainly focuses on convenience stores in 48 countries around the globe. In 2020, the company introduced a new one-person-store concept called "SPAR mini market." The concept is a convenient solution for maintaining social distancing during the COVID-19 pandemic. The new store is only 16 m2, designed for one customer at a time, and can be transported easily to any possible location. The store assortment changes six times per day based on the eating habits of consumers throughout the day. The customer pays using self-checkout. Nonetheless, there is also one staff member on stand-by to assist customers whenever needed. The initial idea behind the container concept was to place it at different festivals. The festival season is over, but the store is still used at various places in the Netherlands. The flexible "mini market" can even be placed on the water. Very convenient for the many Dutchies with a boat!

**KEY DATA**

**Country:** The Netherlands
**Retailer:** SPAR
**Format:** Supermarket



## WHY IS IT INNOVATIVE?

- **Mobile & floating**
  Due to its small size and portability, the stores can be moved to any possible location at any time. The stores can even be placed on water and are accessible by boat.

- **COVID-19 proof**
  Because only one person can enter the shop at a time, it is a solution for social distancing during the COVID-19 pandemic.

- **A new assortment 6x a day**
  The assortment is adjusted 6 times every day depending on the eating habits of customers during the day. This motivates repeat visits throughout the day.










**Ebeltoft** Group Expert Comment

This concept is a unique solution for customer convenience since it can be moved to any place where supermarkets are not available. Additionally, it is an up-to-date solution for social distancing during the pandemic.

South Africa

# Usave eKasi

The Shoprite Group of Companies is Africa's largest food retailer and operates more than 2,800 stores in 15 countries across Africa.  Following a decline in its profit margins in the 2019 financial year, the Shoprite Group is trialling smaller, more capital-efficient store formats across all its supermarket brands. One of the great innovations within the group is the Usave eKasi concepts which aims to service the previously marginalized residential areas with strong low-income population bases. The small-format stores offer a limited range of basic foods at most affordable prices and takes advantage of precision shopping technologies to understand the type of products to be sold in specific shops / locations. Thus, providing specific products in specific areas depending on the real-world demand.




**KEY DATA**

**Country:** South Africa
**Retailer:** Shoprite
**Format:** Supermarket

## WHY IS IT INNOVATIVE?

- **Convenient**
  Stores are located close to the previously marginalized, and typically under-serviced, residential and rural areas. Customers can now travel short distances and save on travel cost.

- **Precision retail**
  Products sold at a particular location are aligned to the product demands of the area.

- **Inexpensive**
  Now the predominantly low-income local communities can have access to affordable products otherwise not offered by informal retailers in these markets. Saving people money who needs it most.

- **Boost Local economy**
  Create jobs for locals. Encourages local retail spent – less outflow of capital.
  Small Store Format– This container store can be placed at any possible location, regardless of how remote the area can be.








**Ebeltoft** Group Expert Comment

The Usave eKasi concept will take affordable food & groceries to the population that needs it most. In turn this will limit travel time and costs within communities with the highest dependence on costly public transport. Ultimately, boosting previously disadvantaged micro-economies and empowers local entrepreneurs (Informal traders/Spaza shop owners). Precision retail concept will better serve the local communities with products specific t their needs.

Australia

# Vinnie Victoria Op Shops

Being in retail in 2020 is about recognizing the needs of your customers, understanding their wants and buying habits and putting an emphasis on rewarding them. Vinnies Victoria know this and is redesigning their business for the benefit of all.

Vinnies Victoria is a not-for-profit organisation and operates over 100 shops in Victoria that provide donated clothing, household items and furniture to families and people who are in need.

Jeff Antcliff, General Manager Vinnies Retail, explained his vision of a customer-centric approach, a model of operations where the customer comes first and receives loyalty benefits in a category that historically does not provide them, while at the same time creating an ecofriendly environment.

Their ability to serve the community through Vinnies shops relies solely on the kindness and generosity of those who donate quality items to sell in their shops. Vinnies encourage all sorts of donations of clothing, household items, furniture and ornaments. Thanks to an army of volunteers in the shops they're also able to keep running costs to a minimum and in turn provide even greater support to the community.



**KEY DATA**

**Country:** Australia

**Retailer:** Vinnies Victoria

**Format:** Second-Hand Store

## WHY IS IT INNOVATIVE?

- **A VIP club for loyal members**
  One of the most effective ways to recognize the most loyal customers and reward them for their loyalty is by launching a VIP club. Aside from increasing subscription rates, this VIP club is aimed at rewarding more customers and to keep them coming back. It is a redemption program that is automated and offered at the POS, so customers don't need to keep track of the benefits. There are also clear retail principles of clutter-free stores, attractive presentations and engaging promotions that drive return business.

- **Reuse, recycle and a green night's sleep**
  Vinnies Victoria also chooses to work on its environmental credentials, which they know is important to their customers who look to re-use products in their
  shops. They have moved to Envirobags instead of plastic bags and have several waste recycling programs operational right now.
  One example is that Vinnies Victoria have saved 10,000 mattresses from landfill. They take secondhand mattresses, re-spring and re-cover them and then sell them at a low cost to people in need – with a warranty.

- **Retail training for volunteers**
  Vinnies Victoria has over 5,000 wonderful volunteers in their shops and they are given on the job retail training and mentoring. Store managers and senior shop leaders also receive training in areas such as mental health to help look after customers in need in the community.

- **New suppliers**
  When Vinnies Victoria need new product to complement their range they first look to source from local suppliers and manufacturers in Victoria.
  Any overseas suppliers must comply with strict sourcing rules that ensure their workforce is treated well and fairly. These values are important to the Vinnies organisation.
  Vinnies Victoria are using these retail strategies and many more like them to underpin the Vinnies mission and values of serving the community, as well as leading the growing secondhand sector in Australian Retail - what an opportunity, and the skies the limit.




**Ebeltoft**
Group Expert
Comment

This business is a leader in their market space of pre-loved items and retail excellence. They use their VIP club to sell online products that are not typical for Charity Shop retail. They have also developed a collection of new products to fill in the gaps in traditional op-shop products. Linking this together with their loyalty scheme to drive customers into their stores and online.

South Africa

# Zulzi Digital Mall

Zulzi is a digital on-demand delivery platform that allows customers to buy items from multiple retail categories ranging from Food & Groceries, Liquor and Pharmaceuticals, the items are then delivered to the customers within an hour. The retailer focuses on delivering products that typically do not have a strong delivery service in South Africa. Customers can purchase items from prominent national brand retailers like Pick n' Pay, Woolworths, Dis-chem and Clicks etc. The stores that customers can order from depends on their location. The business was established in 2016 but saw massive growth during the Covid-19 times.




**KEY DATA**

**Country:** South Africa
**Retailer:** Zulzi
**Format:** Web shop

## WHY IS IT INNOVATIVE?

- **Convenient**
  Customers can buy items from a mobile application. Items can be purchased from multiple retail categories.
- **Quick Delivery**
  Purchased items are delivered within an hour.
- **Multiple store purchase**
  The Zulzi Platform allows customers to purchase good from multiple stores at the same time. Both national and independent retailers are available in the platform.
- **Covid - 19 Proof**
  The platform encourages social distancing and minimize the number of people in local shopping centres.
- **Location Specific**
  Contributes to local micro-economy of an area as customers can buy in stores in their area.









**Ebeltoft** Group Expert Comment

The Zulzi platform is very convenient as it allows customers to purchase items from multiple retail categories from different national brand retailers as well as independent retailers in different geographic locations. The platform is a good solution for Covid-19 precautionary measures. Fast-tracking delivery of type of products that aren't typically delivered to your door in South Africa, i.e. Groceries.

Trend #3

**LINGERING** **BRAND BUILDING** **EVER-CHANGING** **AMPLIFICATION**

**SOCIAL SHARING** **EMOTIONAL** **FLAGSHIP**

# Extreme Experience

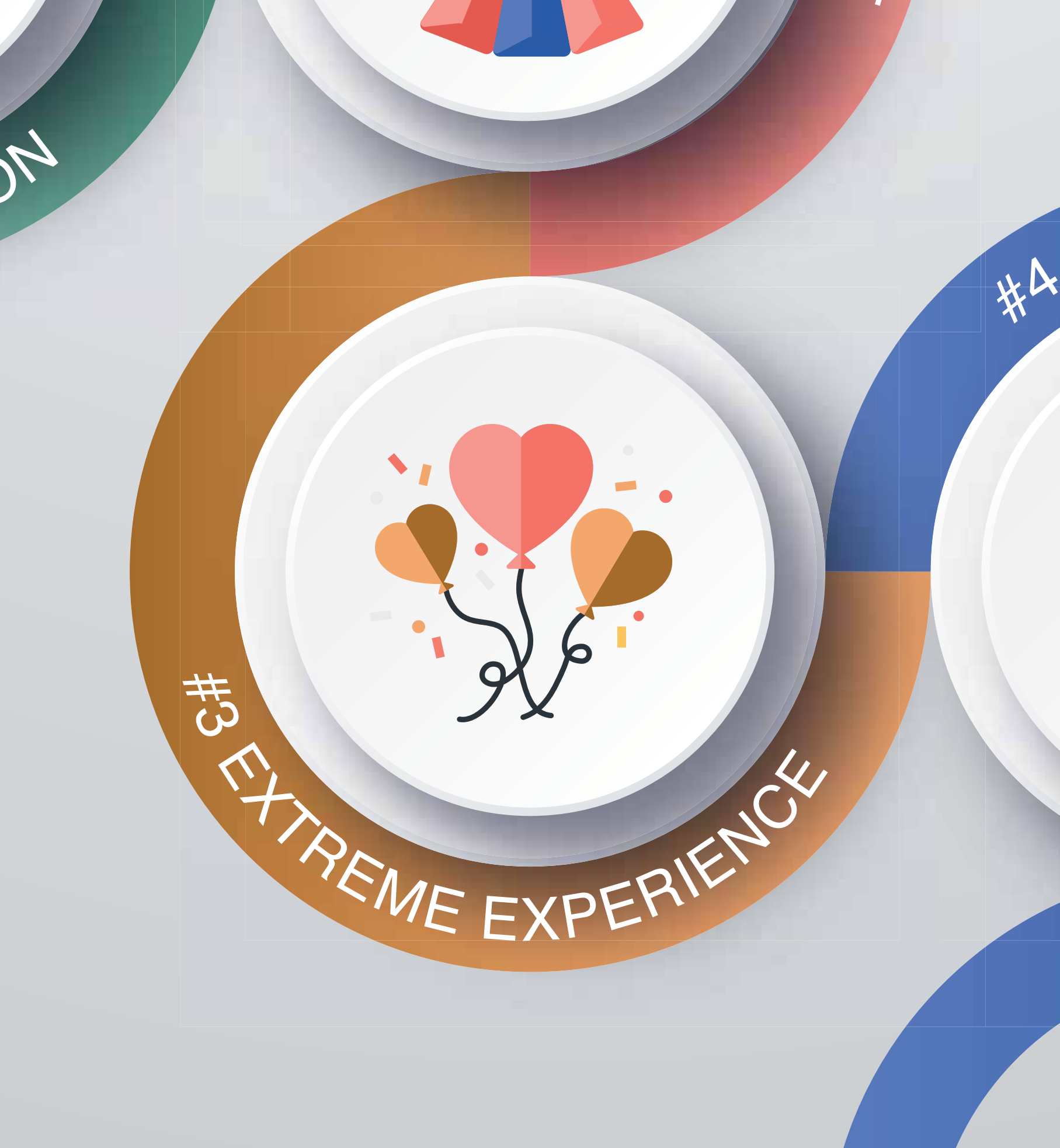
Before the corona outbreak, consumers were craving physical experience and entertainment. This trend has been slowed down by Covid-19. Nonetheless, consumers have the need to interact with retailers and brands through digital engagement. Retailers and brands are pushed to offer innovative concepts that replace previous face-to-face experience with interactive online solutions.

Nevertheless, interaction and engagement in the store with products, staff, and brands will remain essential in the future. A safe environment is key in order to continue the physical experience and, thus, identifying customer needs, building relationships and loyalty, and personalizing the shopping experience.

Consumers do not choose products based solely on functional value, but, rather, based on emotions that engagement and experience ensure. Intensive storytelling and strong content are paramount to creating identification and emotional ties, boosting brand loyalty.

The customer-to-customer relationship is also important for the brick-and-mortar experience. Retailers and brands can differentiate the experience by providing a social dimension beyond interaction and engagement with store associates. For 2021, the main challenge will be to facilitate physical shopping in a safe manner while at the same time developing online engagement solutions that will partly cover the advantages of offline experiences. Important topics for retailers and brands are:

- Ensure a safe shopping environment in the stores at all time
- Integrate elements that elevate and define the identity of the brand offline and online
- Offer an ever changing experience that creates excitement and a lasting impression to attract potential new customers.
- Develop personal customer service solutions online that were previously only taking place offline


#3 EXTREME EXPERIENCE
#4

United States

# CAMP Experience Store

Camp is a 10,000sf playground that brings summer camp indoors. It is a hands-on, immersive store that is more playground than shop. Kids can engage in activities like gardening, arts and crafts, games, etc., plus there are goods for sale. Revenue is primarily from merchandise, with 20% coming from memberships. It also runs up to seven activities a day—like sing-alongs, yoga or arts and crafts, and date-night drop-off services. During the COVID-19 lockdown, CAMP hosted free virtual birthday parties everyday at 5pm EST. Participants were able to invite family and friends via a virtual guest list link and with advance notice, CAMP tried to personalize the party for any kid celebrating their birthday. Upgrade options were available for private online birthday parties- a creative way to "digitize" their in store offering while social distancing. Additionally, CAMP teamed up with Walmart and a roster of celebrities to offer virtual summer camp experiences to the Walmart app.



**KEY DATA**

**Country:** United States
**Retailer:** CAMP Experience Store
**Formats:** Store, Online, Mobile

## WHY IS IT INNOVATIVE?

- **Nimble**
  CAMP pivoted nicely online and through partnership with Walmart during COVID-19 shelter in place, offering activities online like absurd challenges, mastering new talents, and interactive art classes.

- **Ever-changing**
  A place for families to hang out and have fun together on a very regular basis without getting bored due to constantly rotating themes and merchandise are which are interactive and engaging.

- **Hands-on**
  A cool specialty toy store with themed play areas where merchandise is displayed and accessible to kids and parents who can play while shopping.



## Ebeltoft Group Expert Comment

- To discourage people from browsing without buying, Camp has introduced several dozen exclusive toys and plans to aggressively expand that selection
- It updates its look and feel with a new theme every few months and offers a rotating selection of thousands of toys to play with
- Leveraged their collaboration with Walmart to engage with their target customer while physical locations were closed

Spain

# Casa SEAT

## A "house" open to the city.

Automotive manufacturer SEAT has opened a store concept in Barcelona's most coveted street, Passeig de Gracia, called CASA SEAT to be closer to consumers. "Casa" means house in Spanish and SEAT aims to be a welcoming host to both Barcelonans and city visitors in this flagship concept.

SEAT wants to be part of the city's life, hosting exhibitions and events about mobility, sustainability, art and culture, design, innovation and creativity. Visitors can find out the latest about SEAT projects or try some selected vehicles from their brands: SEAT, SEAT MO –urban electric solutions- and CUPRA –racing cars and upscale models-. There are interactive screens and displays to wow the visitor and make the experience engaging and fun.

The building also hosts SEAT's CEO office and the brand's Design Lab. In order to have a real connection between the brand and the city, next to the design lab, there is a co-working area for young and innovative entrepreneurs; additionally, there is a casual restaurant as well as comfortable seating to lounge or work, which is open to everybody.

Casa SEAT is an innovation hub where to explore the future of mobility, creativity and design.



**KEY DATA**

**Country:** Spain

**Retailer:** SEAT

**Formats:** Flagship and hub

## WHY IS IT INNOVATIVE?

- **Brand's positioning and proximity**
  Casa SEAT is a "house" planned to be active part of the city life and to closely connect with its inhabitants and visitors. It hosts the brand's headquarters as well as the design lab and welcomes everybody to learn, experience, participate or work in and cocreate the future of mobility.

- **Innovation and sustainability advocacy**
  New solutions for urban mobility to shape new ways of sustainable city-life and transport. Seat is committed to sustainability by promoting values for the good of the community through an agenda of events and a networking area.

- **Never seen before fun experiences**
  Impressive digital car configurator (166" screen) to access and personalized whole Seat range for sale. Interactive screen with a robot mimicking a person's moves.








**Ebeltoft** Group Expert Comment

The new retail concept of CASA SEAT shows the brand's ambition to get closer to consumers and contribute to city life. It is an important investment which reinforces brand positioning and a higher emotional engagement, specially achieved with:

- Location: SEAT originated in Barcelona and the whole store is a proud sign of this: from slogans to the light fixtures, everything has to do with Barcelona design and creativity.
- Open house: the visitor has a feeling of entering SEAT's office hall and being very welcome. It is the visitor who decides their own degree of participation and interaction with the proposed brand experiences and events.

United States

# CVS Health Hub

CVS is the largest pharmacy health care provider in the United States and with the acquisition of Aetna in 2018, they became a pharmacy and health insurer under one umbrella. CVS HealthHUBs are a step up from the traditional CVS Pharmacies and place an emphasis on prevention and chronic disease management with services such as sleep apnea assessments and blood draws. HealthHUB location selection is strategic. The company leverages Aetna's data on its members' health conditions to inform the expansion strategy.  CVS plans to have a chain of 1,500 HealthHUBs, wellness-focused stores devoting 20% of floor space to health products and services, by the end of 2021 as part of its enterprise growth strategy. CEO Larry Merlo stated that approximately 100 HealthHUBs were active as of May 2020.




**KEY DATA**

**Country:** United States
**Retailer:** CVS
**Format:** Store

## WHY IS IT INNOVATIVE?

- **Proactive**
  Health HUBs harnesses consumer data from several sources to calculate the 'next best action' for a healthcare consumer—advising when it might be good to get an examination or take a new tactic in managing a chronic condition

- **Integrated**
  Digital offerings allow for the management of prescriptions in a single app. Stratify insurance customers into risk buckets to deploy targeted resources at physical touchpoints. Leverage data and digital tools to inform strategy, educate customers and streamline the experience

- **Personalized**
  HUBs have in-store "care concierge's" that direct customers to providers that can meet their specific needs (i.e. nurse practitioners or nutritionists)









**Ebeltoft Group Expert Comment**

Health Hub concept transforms CVS location from a traditional transactional experience to an engaging community destination for both acute and preventative healthcare. The concept leverages an upskilled team, digital tools and an expanded assortment to provide resources on site to educate consumers and provide solutions to their health issues in one convenient location.

- Health Hubs take a proactive approach to health care by using data to understand the most common medical conditions present in the communities they serve and developing messaging and solutions to tackle those conditions
- "Pharmacist Panels" combine pharmacy and medical data to provide a holistic, 360-degree view of the customer to help better identify the "next best action"

France

# DX - Decathlon

Decathlon the French leader in sports equipment is renowned for providing its customers with retail innovations. Through its new 800 sqm DX store, Decathlon breaks the codes shaping a place crossing between a store, a showroom and a lab with a series of technological innovations:

Being a member is mandatory in order to enter the store as the customer will have to scan a QR code at the entrance.

- With "Decath' Go" members of the loyalty program can leave with their products without checkout thanks to RFID sensors.
- Decathlon implemented a foot scanner developed by the Dutch company Safesize not only to help parents verify their children's foot size and choose accordingly the right one but also to limit customers' returns.
- Customers can save time with a morphological scanner to guide them finding fall season items and avoid fitting rooms
- DX has 3D printers to create prototypes with objective to increase customers' involvement in co-creation projects. In the near future, customers will even be able to customize items by themselves such as bike or scooter handles.




**KEY DATA**

**Country:** France
**Retailer:** Decathlon
**Format:** City Store

## WHY IS IT INNOVATIVE?

- **Efficiency**
  - With "Decath' Go" members of the loyalty program can leave with their products without checkout thanks to RFID sensors.
  - Morphological scanner guides them to find fall season items and avoid fitting rooms.
  - A foot scanner which measures feet to find according shoes and socks quicker and reduce returns.

- **Customization**
  3D printers to create prototypes and enhance co-creation projects with customers

- **Community**
  Obligation to join the loyalty program and to scan a QR Code at the entrance of the store to inform presence in the store









## Ebeltoft Group Expert Comment

This customer oriented and innovative format sets the pattern for subsequent products and services.

Half-store, half-showroom, this concept was intended to test new methods for improvement or to inspire those of tomorrow whether in merchandising, collection, communication, products or even trades .

Brazil

# Dengo

Dengo created a virtual store with physical experience.

Dengo is a Brazilian specially chocolates/coffee brand and store with a value proposition focused on purpose, high quality products and sustainability, their brand tagline is “Pleasure with Purpose”.

They offer high quality chocolates from Brazilian cacao sourced by small independent and local Brazilian producers, the brand’s goal is to develop a sustainable development protecting the environment and transforming the producers’ lives and their communities. The chocolates creations uses traditional Brazilian fruits, nuts and flavors according to their harvest season creating new and unique products.

Their store experience is all based in experience, connecting with customers, targeting their senses, storytelling about the brand, the producers and the products. Due to Covid-19, Dengo was forced to close their physical stores and focus on the digital channels and had to reinvent their online experience to deliver the same value proposition from the physical stores. The solution was to create an online store where customers can access a live stream of a real store in a shopping mall where they can interact in real time with a sales associate that could deliver the brand value proposition in the digital world.



**KEY DATA**

**Country:** Brazil

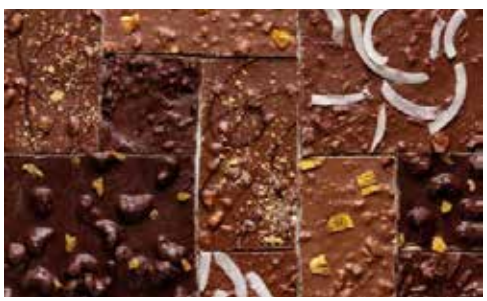
**Retailer:** Dengo

**Formats:** Stores and Digital

## WHY IS IT INNOVATIVE?

- Innovation due to the necessity to have a real life store experience even due to covid
- Adding value and experience in the digital channels







## Ebeltoft Group Expert Comment

This brand is focused on sustainability of the communities they source the products, value the "real" chocolate and create new mixes with brazilian products, the store experience is quite unique and it's the core of the value proposition, Dengo experience is based in storytelling and senses.

Retailers around the world are testing and experimenting ways to create an online experience that matches the physical stores, Dengo's "live store" is a creative alternative that combines the humanity and relationship of the physical stores with the convenience of the digital channels.

Denmark

# Fætter BR/Salling Group

## Do you want to play?

Danish grocery giant Salling Group took over Danish toy chain Fætter BR in early 2019 and is now working to transform the stores into giant playgrounds with hands-on experiences, rather than just stores with shelves full of products. The chain has already opened five stores within the new concept, and all of them are designed to put play into focus. The new store concept engages visiting children to play and participate in the stores' different playgrounds and themed universes, and children can e.g. experience a four meter tall Barbie-house, a pirate ship, a pool filled with Legos to build, an action zone, a race track and much, much more. Additionally, the store offers different events and activities, that makes it even more interesting for the small customers to visit the stores; e.g. a Disney's Frozen or Harry Potter event, where the children can be face-painted to fit the theme.



**KEY DATA**

**Country:** Denmark

**Retailer:** Fætter BR/Salling Group

**Format:** Experience toy store

## WHY IS IT INNOVATIVE?

- **Participation**
  The Fætter BR experience-store is offering brands a new way to showcase the products, allowing children to play with the toys before buying them.
- **The advantage of offline**
  In a time where more and more toys are bought online, creating an experience store is more competitive than having a physical store just to sell products.
- **Engagement**
  The much higher level of engagement with the Fætter BR brand is making children want to come back again and again.













## Ebeltoft Group Expert Comment

The Fætter BR experience store shows how a toy store can stay competitive in a world where online is taking a bigger share of the market. By actually transforming the store into a play universe and engaging their customers through different play universes, Fætter BR is able to attract more customers to the stores by adding the social dimension to the concept and thus giving them another reason to visit other than simply buy products, which could have been done online.

Germany

# Fina & Liv

Fina & Liv is aimed specifically at women during and after cancer therapy. It provides an ambience that offers normality and a feel-good environment in contrast to the common clinical atmosphere of medical stores, inviting customers to linger.

The presentation of the offered products from compression stockings and wigs to lingerie suitable for breast prostheses is comparable to a high-quality lingerie boutique. On the area of the 350m2 large store there are spacious changing rooms, a separate consultation room for undisturbed conversations and even a yoga room. The interior design is feminine, providing a wholesome shopping experience for the customers. The colorfulness is tastefully restrained with lots of oak wood and wallpapers patterned with flowers, as well as subtle rosé tones for seating furniture and chests of drawers.




**KEY DATA**

**Country:** Germany
**Retailer:** ORTHOMED GmbH
**Format:** Concept Store

## WHY IS IT INNOVATIVE?

- **Regaining normality**
  With the help of the store design, Fina & Liv consciously tries to move away from the severity of the topic of cancer therapy and offers the customers a feel-good atmosphere.

- **Customer focus**
  The store is all about a holistic customer experience. The focus is not only on health care supply products, but also on the recovery of the body, which is symbolized by the yoga room.

- **Renewing an Industry**
  Fina & Liv brings a new light into the rusty image of cold, clinical medical stores.









**Ebeltoft** Group Expert Comment

Nowadays, companies are looking for their purpose - the why, the added value for society. Selling products is no longer enough. Fina & Liv embodies the word Purpose: helping women to feel strong, beautiful and feminine again after challenging life situations. Therefore, they have reinvented the medical supply store.

Fina & Liv's concept is an exceptionally successful example of how a store concept can be tailored to a specific target group and thus optimize the customer experience.

United States

# Gucci Tennis Clash

The high fashion house has teamed up with mobile game, Tennis Clash. The collaboration features two new character designs, and the apparel, headwear and accessories are the epitome of "sports-luxe". This unique in-game experience offers players the chance to discover exclusive Gucci products and purchase products to match their Tennis Clash character on Gucci.com, bringing the real and virtual worlds together.

Additionally, players will also be able to participate in the "Gucci Open", a new in-game tournament game mode. To elevate the experience, the tournaments feature new Gucci branded tennis strings and court.




**KEY DATA**

**Country:** United States
**Retailer:** Gucci
**Format:** Gaming Platform

## WHY IS IT INNOVATIVE?

- **Unique**
  Gucci is a pioneer amongst luxury brands, leveraging virtual games to craft distinctive brand experiences.

- **Relevant**
  Luxury brands are trying to reach and resonate with younger consumers. Gucci has met this target audience where they already are.

- **Engaging**
  The objective of the Gucci x Tennis Clash collaboration is to facilitate engagement with the brand. Driving transactions is an ancillary focus.






**Ebeltoft**
Group Expert
Comment

At a time when the world is battling COVID-19 and large gatherings like Wimbledon have been cancelled, Gucci is looking to give fans a distraction. Given the recent shelter in place orders, video games and esports have seen a rise in user engagement. Having already pioneered the relationship between the world of fashion and gaming through the Gucci Arcade games on the Gucci app, Tennis Clash was a natural extension.

Switzerland

# La Petite Épicerie
## Food Container

La Petite Épicerie is a Swiss Food- and Near-Food Retailer which sells his regional products in a modified cargo container. The products are from local vendors which are in vicinity. They started out with just one shop in Bavois VD and because of their success they opened another shop in Juriens. The shop has no employees, every customer can buy products via the app during 7 days and 24 hours per day.



**KEY DATA**

**Country:** Switzerland
**Retailer:** La Petite Épicerie
**Format:** Supermarket

## WHY IS IT INNOVATIVE?

- The payment method happens via a mobile phone application.
- The shop is open 7 days a week and 24 hours a day.
- The products are regional, local and biological, as well as traceable.






**Ebeltoft** Group Expert Comment

The Shop "La Petite Épicerie" has been very successful during the Corona-Pandemic but also the aspect of fresh and regional food has become more important to customers. Moreover, the development back to smaller shop spaces has been proven right, as the container is a shop with limited space. Sustainability can be maintained by providing electricity with solar panels. This year's trends have been combined in this shop and it has shown how successful those can be.

Spain

# Mercat d'Autors

Health grocery chain Ametller Origen has opened its biggest concept store which includes the innovative "Mercat d'Autors". It is a market style shopping experience with several stalls and kitchens. Dishes from five of the most renowned local chefs, some of them Michelin star awarded, are cooked on the premises daily. All dishes are ready to eat or ready to cook and are mainly thought for take away, so they are always packed after preparation and displayed in their packaging; this packaging process also allows Ametller Origen to sell packaged fresh meals signed by famous chefs in most of their grocery stores after an easy logistics operation.

At Mercat d'Autors there is also a bakery with a focus on natural ingredients and processes: all flour used is grounded right there on site.

The visit can turn into an eating experience as well: a seating area can be found that operates like a casual restaurant with an extended menu
from those chefs.




**KEY DATA**

**Country:** Spain

**Retailer:** Ametller Origen

**Formats:** City market selling ready to eat or ready to cook food

**Website:** ametllerorigen.cat/es/mercat-autors/

## WHY IS IT INNOVATIVE?

- **Show cooking market of stars**
  Mixing a market layout with renowned chefs working in each stall delivers a unique entertainment experience to shoppers.

- **Transparency provides credibility**
  Open kitchens allow customers to witness the whole cooking process from scratch, seeing the fresh ingredients of the packaged prepared meals sold at any store of the grocery chain.

- **High cuisine made easy to access**
  Renowned and awarded chefs cooking fresh meals for a grocery chain at affordable prices. It adds value to the positioning for a healthy grocery chain with a focus on local, organic and healthy foods for everybody.








**Ebeltoft** Group Expert Comment

Mercat d'Autors goes beyond the convenience of selling cooked meals by successfully innovating in the following smart ideas:

1. Storytelling: it puts focus on the celebrity chefs, turning the visit into a show, a gastronomic and social experience, worth visiting and telling about it, thus driving traffic to the store.
2. Efficiency & Convenience: fresh meals are prepared and packed onsite, ready to go so they can be transported and sold in other outlets of the grocery chain or ordered online and delivered, maximizing the ROI of the agreements with the renowned chefs, and upgrading the perceived quality of the packaged meals sold in the whole chain.

Portugal

# Mezze

## "cozinha do médio oriente"

Someone asked a Syrian student living in Lisbon what she missed most. And she answered, "Syrian bread!" This was the starting point for an absolutely pioneering integration project in Portugal: an Arab food restaurant, the Mezze, where training and employment are given to refugees from the Middle East.

Because bread is one of the elements that connect us to the home, the Mezze is a space where bread is produced and several of the dishes that accompany it. It is much more than a restaurant: it is a meeting point and a place of sharing.

They use the skills that many women and young people bring with them and provide them with the tools to enhance their work - and their identity.

The "Mezze" project thus generates sustainable employability solutions and contributes to true inclusion, in a model that its creators and developers - the Bread to Bread Association "space for the integration of refugees from the Middle East, including community cooking and cultural workshops" - intend to replicate elsewhere in the country.

And because integration is a two-way process, Associação Pão a Pão has organized workshops and debates with the aim of bringing together, reducing ignorance and blurring prejudice. The Mezze restaurant opened in Lisbon, in September 2017.



**KEY DATA**

**Country:** Portugal
**Retailer:** Mezze
**Format:** Restaurant

## WHY IS IT INNOVATIVE?

- **Use of kitchen as differentiating place**
  A very important part of the project beneficiaries' own identity - the kitchen - to value and differentiate them.

- **The kitchen and table acting as bridges**
  The identity serves as a bridge between the refugees and their new host community. The restaurant table is a very important place of sharing.

- **Self-sustaining social project**
  Almost since its creation, it has proved that a well-defined social project does not need to be dependent on support. On the other hand, with the taxes paid by the association / restaurant and the people employed in it, the support received from public entities / state has already been "returned" on a larger scale.

- **Place for cultural sharing**
  In addition to the restaurant, workshops and debates are held, spreading Middle East culture and helping to blur prejudices.
  "Mezze is therefore much more than a restaurant".







**Ebeltoft**
Group Expert
Comment

Customers visiting Mezze for the first time are mainly Portuguese, coming from all over the country and not only from the Lisbon region. This fact results from the divulgation of the Mezze project on social networks and even on mass media such as television. Foreigners also in a relevant number, are aware of the project through communication coverage mainly through the internet and social media, one in several examples below:
culinarybackstreets.com/cities-category/lisbon/2018/mezze/

Portuguese and foreigner customers are predominantly young people between the ages of 20 and 50 and seek out:

1. A different meal, with Arabic food increasingly in fashion
2. Get to know the restaurant project even beyond the meals as through the workshops and debates, get to know more closely the culture of different Arab countries and their citizens.

Spain

# RUBIO

## New era for a publishing company

Rubio is a learning material publishing company that developed its own learning method. Most Spanish people have learned to read and write with Rubio booklets: instant nostalgic engagement towards the brand.

The company opened an online store a few years ago, selling its famous booklets and a wider range of products related to writing, drawing, painting and learning. Now, the 64-year-old brand evolves its business concept by launching its learning method in a digital format and opening a highly interactive flagship store.

The future of publishing: Rubio starts selling its screen adapted content D2C through an app for tablets. The content now mixes learning with gaming, in order to keep teaching to new generations while entertaining them.

The flagship store has a unique design, with retro-futuristic look to appeal to kids and to make adults go back in time. It is very innovative and interactive –allowing kids to learn and discover while playing-, and at the same time, it pays tribute to the brand's history. The store also has an agenda of activities and workshops, although on hold during the pandemic.




**KEY DATA**

**Country:** Spain
**Retailer:** RUBIO
**Format:** Flagship store

## WHY IS IT INNOVATIVE?

- **Re-invention**
  A traditional publishing brand that leads innovation by re-imagining its learning method for the new native digital generations. RUBIO has transformed its business and product concept to new times, media and generations. It has not only adapted existing brochures to digital format.

- **Learning by entertaining**
  Both the digital product and the physical store pivots around playing and discovering; learning is a result of the interaction with the content and the experiences.

- **Unique store design**
  An impactful store design that invites visitors of all ages to experience and to discover. With elements that take adults back to their growing years and elements that stimulates children to interact.








**Ebeltoft** Group Expert Comment

Rubio's innovative retail strategy showcases an impressive business evolution of an historic educational brand, known for its learning method: embracing digital means while paying tribute to its history and interacts directly with consumers.

The store is fun for kids and an attraction by itself for many adults and this is achieved by a creative and unique combination of innovative experiences and nostalgia.

A well thought omnichannel concept to drive brand engagement and business transformation. By applying relevant innovation and going to retail, Rubio is rejuvenating the brand.

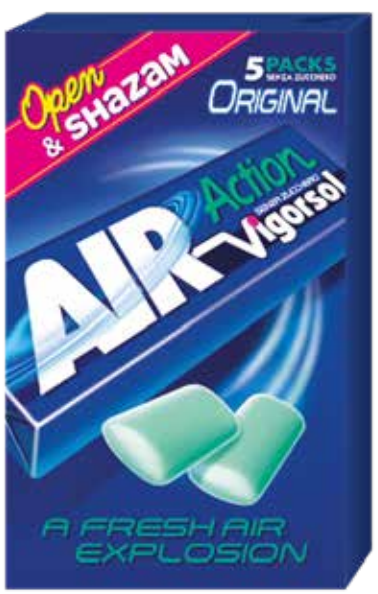
Italy

# Vigorsol
## loyalty campaign ‘Chew Cool Look Cool’

Vigorsol, the chewing gum brand, has implemented an engagement strategy based on storytelling, competitions, augmented reality (AR) and gamification. By framing a logo on the products with the camera on their smartphones, customers can access exclusive content through the shazam app, complete with engaging videos in augmented reality; characters from the brand’s TV commercials invite people to participate in missions and to create customized photos that can be shared on social media.
This loyalty campaign won many awards, including the best contest prize of the Brand Loyalty Awards in 2019 and the Innovation prize of the Best Innovation Awards in 2018 in Italy.

**KEY DATA**

**Country:** Italy
**Retailer:** Vigorsol
**Format:** Loyalty campaign






## WHY IS IT INNOVATIVE?

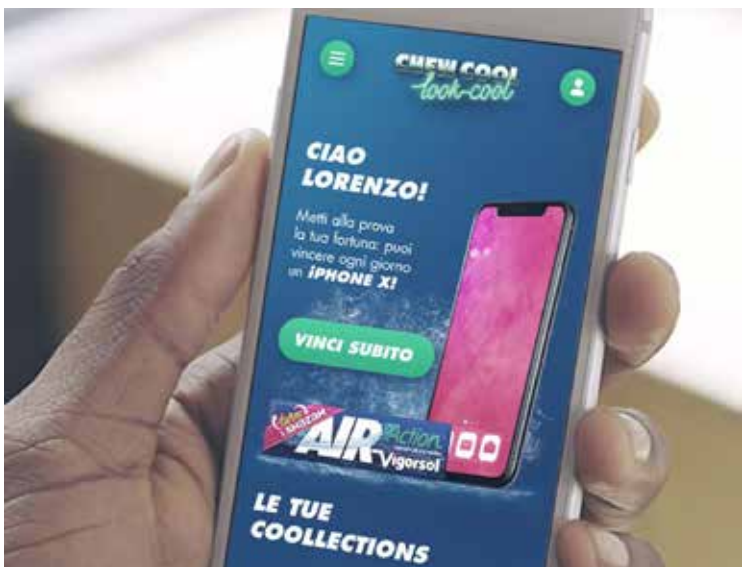
- **Engagement**
  Stimulating customers to become a spokesperson for the brand by becoming the protagonist of their own story via user generated content.

- **Partnership**
  Collaboration with the Shazam platform. Usually loyalty programs develop their own platform or websites; by using Shazam Vigorsol can interact with the clients where they already are; this can help boosting the recognizability and the interactions with the clients.










## Ebeltoft Group Expert Comment

Campaign that uses augmented reality, competitions and gamification to encourage engagement with the brand and to turn customers into advocates by sharing personalized photos on social profiles.

Trend #4

**CONSCIOUS CONSUMPTION PURPOSE RESPONSIBILITY POP-UP ACTIVISM**

# Sustainable Practices

Consumers are more conscious now than ever. There is no planet B which speed up the need for sustainable solutions and transparent chains. Additionally, consumers are more aware that their personal health is not for granted. Therefore, a healthy diet, wellness and mental health is at the top of customers' minds. Conscious consumers are becoming a larger and more vocal segment of the population.

Implementing sustainable practices is all about demonstrating social responsibility and highlighting an ethical, honest, and responsible business. It means taking responsibility by offering consumption in good conscience by producing environmentally sound and responsible products and services.

Sustainability, animal welfare, and fair trade are in high demand. Consumers are increasingly looking to align with brands and retailers that share their values. It is about demonstrating responsibility through the entire value chain and far beyond the brand core products or service. Retailers connect on a deeper level with consumers to help them feel like they are contributing to a greater purpose when shopping the brand of the retailer.


#4 SUSTAINABLE PRACTICES
ENCE

The Netherlands

# Albert Heijn

## Foodstarts initiative

Albert Heijn is the biggest supermarket chain in the Netherlands and part of Ahold Delhaize. Albert Heijn has the mission to let customers eat healthier every day by setting high goals, for example, reducing the sugar and salt percentage of all products.Their 2020 campaign is targeted at kids and their families. At the check-out of the supermarket children can receive and collect hard-copy cards for a card game with a fruit and vegetable theme. But it does not stop here. Connected to this card game is a mobile app with online games and challenges. This way they can challenge their classmates or parents by cooking healthy meals and uploading a photo of it. As well as cooking challenges there are other challenges to get kids moving, such as recording short dances very similar to the popular TikTok dance trends.



**KEY DATA**

**Country:** The Netherlands
**Retailer:** Albert Heijn
**Format:** Supermarket

## WHY IS IT INNOVATIVE?

- **Kids as health ambassadors**
  With this initiative, kids can become the ambassador of healthy food themselves by challenging and stimulating their parents to buy healthy products.
- **Combining fun & CSR**
  Successful integration of fun features of the games and app with a strong mission for society: a healthier diet for kids.
- **Increase loyalty**
  Combining hard-copy cards in-store and online games in the Albert Heijn app drives app usage and return rate to store.
- **TikTok infuse**
  The app challenges are aligned well with the target group: the young TikTok generation.




**Ebeltoft**
Group Expert Comment

This new campaign shows how supermarkets can create a win-win situation by encouraging healthy diets from a very young age and cultivating loyalty to their stores. It is an innovative and cost-effective example of increasing corporate social responsibility (CSR).

France

# Bocage – Comme Neuves

For more than 50 years, the French manufacturer BOCAGE has been renowned for its expertise and know-how as a shoemaker. Balancing between tradition and innovation the brand has been able to adapt to the new eco-friendly trend while keeping its heritage. In 2018, the brand launched a rental service called « L'Atelier Bocage » allowing its customers to rent a new pair of shoes every two months. The following year, Bocage created « Comme Neuves » a reconditioned line of shoes from the rented pairs of « l'Atelier Bocage ». Cleaned, disinfected and reshaped at Bocage's Factory in Montjean-sur-Loire, these reconditioned pairs are 'comme neuves' and are sold at -50%.




**KEY DATA**

**Country:** France
**Retailer:** Bocage
**Format:** City Store

## WHY IS IT INNOVATIVE?

- **Offer**
  Reduced prices on reconditioned pairs of shoes
- **Sustainability**
  No more waste. Selection comes from the rented shoes of "L'atelier Bocage"'s service
- **Format**
  New and reconditioned products within the same shop





**Ebeltoft Group Expert Comment**

« Comme Neuves » can be seen as the harmonisation between tradition and modernity. By providing sustainable practices, the brand offers an opportunity for customers to adopt new eco-friendly habits.

Romania

# BuyMySell
## online platform for recycling

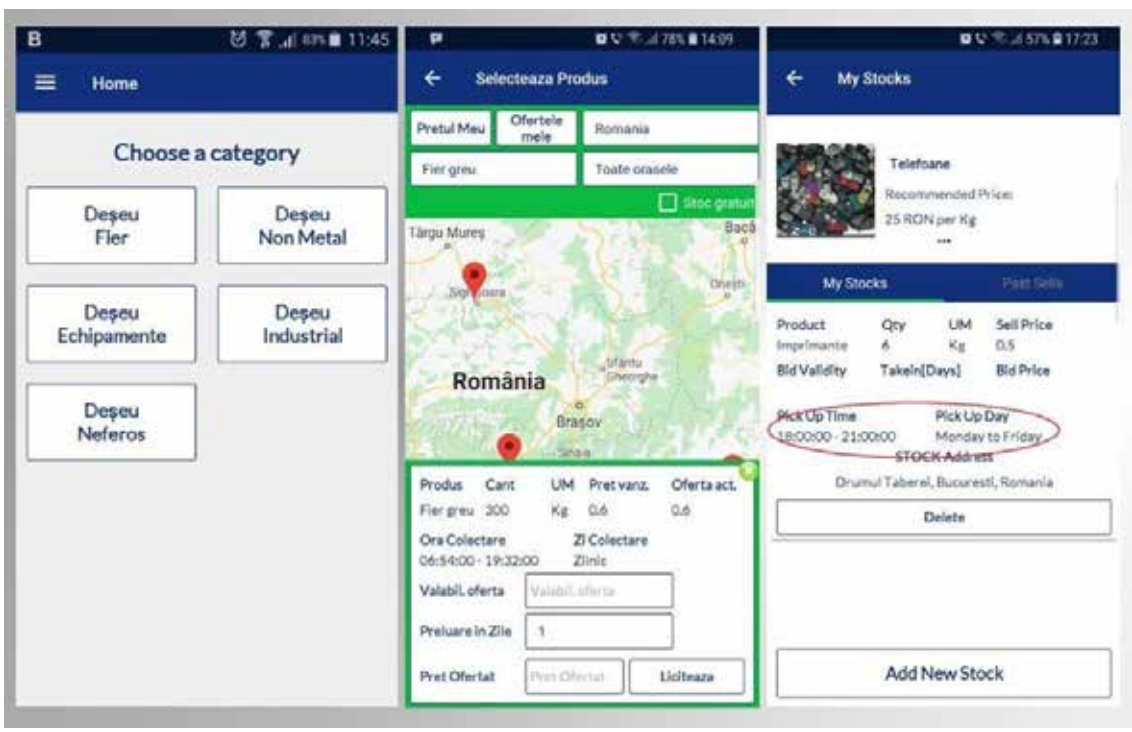
BuyMySell is a mobile app for direct transactions of recyclable materials between consumers and collectors, a direct link between waste collectors and recycling companies. People who want to get rid of their waste and make a profit out of it can post the quantity and the material that they have on the app and then the individuals / companies can bid for it. There are two types of accounts: Buyer and Seller. The app also has a component where local producers can sell fruits and vegetables.

**KEY DATA**

**Country:** Romania

**Retailer:** BuyMySell

**Format:** Mobile app



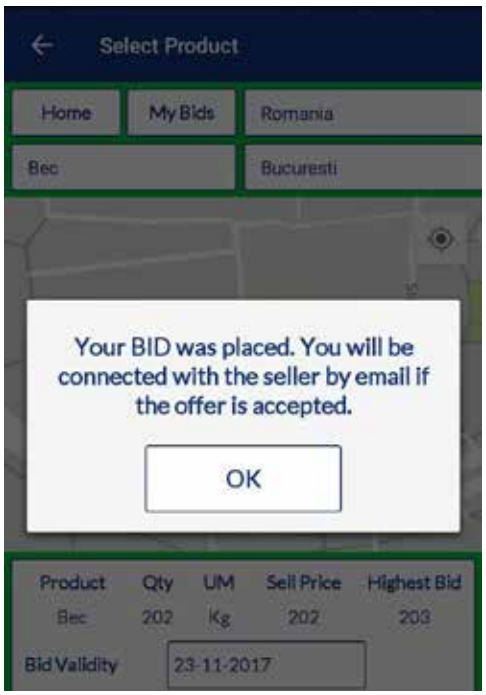
## WHY IS IT INNOVATIVE?

- The app facilitates transactions between legal entities or individuals and the companies that collect recyclable materials.
- The buyers can buy products directly from the producers or companies in the recycling industry, can filter the available stocks in their preferred area and they can bid for them.
- The sellers can be producers or individuals who want to increase their income by selling their waste.
- The sellers also have an option to give the waste for free, fact that gave rise to the "waste couriers" - people that pick the free waste and take it to waste collection centers.
- The app users can search collecting centers nearby. The app also shows the buying price of the waste and the collecting points.
- The app also has a component through which producers can sell fruits and vegetables.










**Ebeltoft** Group Expert Comment

The app encourages people to recycle by easing the process of selling recyclable materials. By having a component where local producers can sell their fruits and vegetables, it also supports the local community. It makes the process easier for the people who are already recycling and it also encourages other people to recycle by offering them the chance to make a profit out of it.

Italy

# Decò
## loyalty campaign "Ti Orto A Scuola"

The Decò supermarket chain (present in central and southern Italy) launched a new loyalty campaign aimed promoting sustainability awareness at schools. Each school receives a kit with 10 varieties of plants that they can grow at their school's vegetable garden. For every 20 euros spent, the participant gets a pack of collectable cards, if the pack includes a magic card, they win a free garden kit to grow plants at home.

Additionally, schools can win prizes, ranging in size from 1,000 to 15,000 euros, for creating the best garden or by accumulating points from codes found in the gardening kits.

The campaign mascot is Ape Maia, a kind bee taken from a 1980's Japanese cartoon. This choice can help reiterating this campaign's link with nature and improving interest among children.




**KEY DATA**

**Country:** Italy
**Retailer:** Decò
**Format:** Loyalty campaign

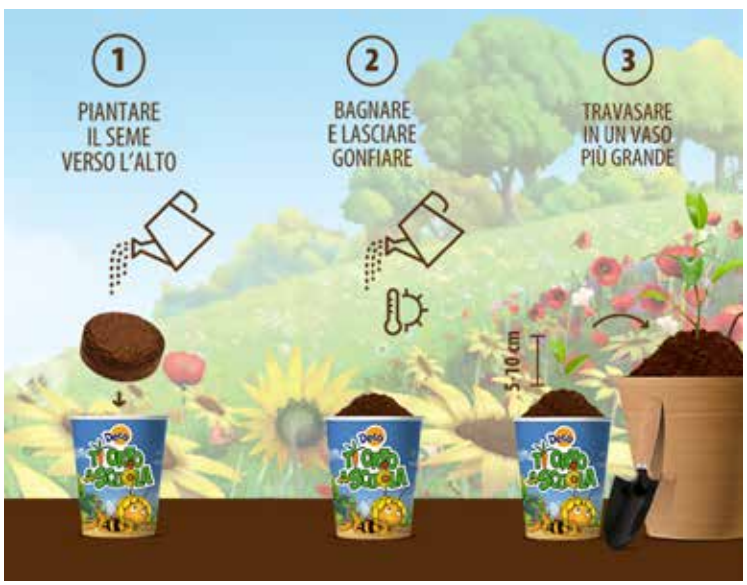
## WHY IS IT INNOVATIVE?

- **Sustainable practice**
  Initiative to bring children closer to nature through the sowing, care and harvesting of aromatic plants and vegetables in a school garden. The initiative also stimulates cooperation.

- **Stimulation of sharing**
  Participants are encouraged to publish on the school website the photos of the progress of the garden and plants. The best ones, as well as winning a prize to the school, are used to create a calendar distributed in schools and supermarkets of the chain.






**Ebeltoft Group Expert Comment**

Interesting and engaging campaign focused on the education of environmental sustainability, launched by a like-minded supermarket chain. In addition, the program promotes sharing and cooperation.

Belgium

# Delhaize

## The Urban Farm

The Belgian supermarket "Delhaize" opened its urban farm and greenhouse on the roof on one of its supermarkets in Brussel, where fruits and vegetables are grown in order to sell seasonal products as fresh as possible. In the best case, the products can be sold only a few hours after the harvest, while lowering their carbon footprint substantially. An external gardening company is commissioned to maintain the garden around the year. The greenhouse is heated by the excess heat of the supermarket's refrigeration units. Delhaize's innovation offers high quality and value of products, a minimization of transport efforts and consumer loyalty. Even gardening projects e.g. by schools can be held on the sustainable rooftop farm.




**KEY DATA**

**Country:** Belgium
**Retailer:** Delhaize
**Format:** Rooftop Farm

## WHY IS IT INNOVATIVE?

- **A new level of freshness.**
  The concept of Delhaize meets the customers' desire for fresh, regional products.
- **Fully sustainable supermarket concept.**
  Delhaize does not only reuse the emitted heat of the supermarket, it also utilizes the given space more efficiently.
- **Customer engagement.**
  With the offered workshops, customer loyalty can be sustained on a different level, especially with environmentally conscious customers.








**Ebeltoft** Group Expert Comment

Delhaize has developed a concept that reinvents the topic of sustainability in the supermarket. With this technology, a portion of the fresh vegetables in the assortment, like tomatoes, eggplants and zucchinis can be sourced locally, even in densely populated areas like Brussel.

Switzerland

# Deli'Vrac's online shop

This is a new online shop in Switzerland that sells fresh and organic food online but in reusable containers. You can order from their online shop and receive everything in glass jars or textile bags/reusable packaging. The next time you order online you return the jars etc. This service only exists in the French part of Switzerland at the moment.

**KEY DATA**

**Country:** Switzerland
**Retailer:** Deli'Vrac
**Format:** Online Shop

## WHY IS IT INNOVATIVE?

- This company only uses sustainable packaging/reusable packaging and gets it back as soon as the next order is being delivered.
- It is one of the first online shops that offers this kind of packaging. Shops where you can bring your own jars were already known, but these are stationary vendors. In the case of Deli'Vrac you can buy/order everything online and it will be delivered sustainably to your house/home.
- The food is from local vendors and is biological as well as organic, which is this year's trend, even more so because of COVID-19.





**Ebeltoft** Group Expert Comment

There are a few shops that offer food without packaging/reusable packaging but there were no shops that would offer this online. Deli'Vrac's intention is to fill this gap in Switzerland. This is a very new method to sell food online.

Italy

# Erbert

Erbert is a sustainable supermarket (500 sqm) opened in Milan in 2020 with a focus on sourcing high quality ingredients from sustainable and local producers. The supermarket carries 2.700 skus (1.500 grocery and 270 private label).

The selection of the assortment, with the support of nutrition experts, promotes healthy eating, biodiversity and a balanced lifestyle. The shops themselves are built using 100% recyclable materials and food packaging in the store is completely compostable, including the price label. Erbert limits waste by selling single portions and by using, furthermore uses cooking techniques that keep as many nutritive substances as possible in the meal.




**KEY DATA**

**Country:** Italy
**Retailer:** Erbert
**Format:** Supermarket

## WHY IS IT INNOVATIVE?

- Central area divided into 3 macro categories (Mediterranean, vegetarian, children) for different times of the day (breakfast, lunch and dinner) with a specific nutritional profile suitable for each meal

- **Services Offered**
  2 in-store food mentors available to customers, delivery service, on-premise eating area

- **Transparency**
  Information about the content of the dishes and nutritional components are provided so that customers can choose products based on their preferences









## Ebeltoft Group Expert Comment

This concept is a contemporary market dedicated to high quality fresh products with a well-studied offering thanks to the support of a nutritionist who advises the team with precise nutritional requirements.

Australia

# Flora & Fauna

Formed in 2014 by Julie Mathers, Flora & Fauna is a retailer offering 100% vegan, ethical, and cruelty-free products. At first, it was all about beauty and skincare, but now fashion, home, and health joined the mix to support better lifestyle choices, including protecting the environment.

The purpose of Flora & Fauna is to provide people with better choices by offering vegan, organic, eco-friendly, and ethical products for improving their lives and protecting the environment. They offer environmental solutions that are easily accessible and very affordable, they educate people on the importance of making responsible decisions that benefit both them and the planet. Flora & Fauna also hopes to inspire other brands and retailers to become more conscious and start focusing on sustainability. As a B Corp Certified business, they are leading the way as a retailer and they hope others will follow suit. Their advice for organisations looking to follow in their footsteps is to be authentic and genuine and to stand by their purpose and values instead of focusing only on making a profit.




**KEY DATA**

**Country:** Australia
**Retailer:** Flora & Fauna
**Format:** Retail stores

## WHY IS IT INNOVATIVE?

- **KPurpose and ethics**
  Flora & Fauna provides carefully sourced, tried, and tested products that have never been tested on animals. Julie Mathers, the founder and CEO, grew up in love with all life and animals, and she is passionate about driving change and protecting the planet.
  In 2017, Flora & Fauna became one of the first retailers in Australia to receive a B Corp Certification. Being a B Corp Certified business means meeting the highest standards of verified social and environmental performance, credibility, authenticity, legal accountability, and public transparency. It means using business to do good – to walk the walk, not just talk the talk.

- **Sustainability inspiring conscious consumers**
  Flora & Fauna has saved tonnes of waste by removing plastic from use. All their packaging, which is made in Australia, is reused and recycled.
  This inspires consumers to be more conscious and make better choices.

- **Connecting with customers & high customer retention**
  Flora & Fauna has a high customer retention rate, as consumers increasingly want to improve their lives and the environment. The company's repeat purchase rate is 40%, with the majority of millennials coming back for another purchase within two months.
  The organisation also has a very high employee retention rate. They grew over the past two years by 300% and 120% respectively.
  This is all thanks to the company's ability to connect with consumers and build strong relationships. They share their passions and encourage people to turn to veganism, but without an ounce of judgment.
  They do this by getting to know their customers first and learning about their pain points, without ever profiling them. They connect with them on social media and via email, where they interact with them daily and weekly, respectively.




**Ebeltoft** Group Expert Comment

Flora & Fauna has saved tonnes of waste by removing plastic from use. All their packaging, which is made in Australia, is reused and recycled. This inspires consumers to be more conscious and make better choices. As a matter of fact, 90% of their customers select minimal packaging when placing an order, choosing to receive just a product in the box, without any tissue papers or samples. They have achieved over 300,000 orders, and their returns are at a small fraction of 1%.

# Sweden

# IKEA

In the fall of 2020, the Swedish furniture-giant Ikea opened secondhand shop in Retuna shopping center, in the Swedish town Eskilstuna, which is known for solely having stores offering upcycled and recycled products. In the Secondhand Ikea-shop, customers can find used Ikea-products and furniture, such as tables, chairs, utensils and bookshelves, that have been repaired and made ready for a new home, at a lower price. Thus Ikea-consumers can deliver their used Ikea-products, that they do not want anymore, whereas two Ikea-employees will pick and evaluate the items, and a team will clean, repair and prepare the products to be sold again. Ikea aims to recycle the products by only using sustainable or recycled materials, and the purpose with the store is to learn more about the consumers' behavior: Why does some Ikea furniture end up as garbage, what condition are they in when people throw them away, and how does people think, when they decide to donate or deliver the furniture to be recycled, as well as to learn if at all the desire to rebuy used Ikea furniture exists. At the same time, Ikea wishes to teach their customers about how to prolong the lifetime of their products, and in the long run, Ikea wants to turn its business model into a fully circular system, where the products are produced with sustainable or recycled materials, and designed to be recycled and resold, which should be successfully completed by 2030. The secondhand store opened its doors on November 2nd as a test, that will be evaluated continuously during the six months the store will be open.

**KEY DATA**

**Country:** Sweden

**Retailer:** IKEA

**Format:** Secondhand shop

## WHY IS IT INNOVATIVE?

- **Sustainable practice**
  Ikea is giving new life to Ikea classics, and older products, by prolonging the lifetime of the products.
- **Consciousness**
  With this concept, Ikea is catering to the conscious consumers of today.
- **Price friendly sustainability**
  The secondhand concept-store is further offering sustainable products at a reduced price.
- **Test for the future**
  Ikea is able to test how a sustainable business model will work for them and should be constructed in order to cater to their customers now and in the future.






## Ebeltoft Group Expert Comment

This concept is a good example of how brands can be more sustainable, take part of and profit from the secondhand market. Further, Ikea is by testing the concept exploring how their customers think and behave regarding sustainable living, which will give them knowledge about how their future business model should be construced.

Germany

# Infarm

## Sustainable Indoor Farming

The Berlin based Startup Infarm is revolutionizing food production by providing farming-as-a-service via vertical farms that they deploy at food retailers and restaurants (e.g. at Irma, Kroger, Aldi Sued, Edeka and M&S) but also in their own growing hubs. The salads and herbs can grow in the greenhouse cabinets at the POS to be sold immediately while tasting considerably better due to the omitted transportation way and shortened timespan from farm to table.

With Infarm, retailers and restaurants gain a self-sufficient supply on greens and herbs while ensuring utmost fresh products. Infarm's cultivation method in stores saves 95% of water, 90% of transportation effort and 99% of space compared to traditional methods, making it a real asset for the environment.



**KEY DATA**

**Country:** Germany

**Retailer:** Infarm

**Format:** Sustainable Practices

## WHY IS IT INNOVATIVE?

- **Redefining local sourcing**
  The concept of infarm is based on the customers' desire for fresh, regional products. More and more people want to know where the products come from.

- **Environmental revolution**
  With this method, herbs and salads can be cultivated more sustainably, especially by minimizing the environmental toll of the transportation.

- **Green attraction**
  The vertical farms with the herbs are an eye-catcher and prove to the customer that the products are particularly fresh and grown locally.









**Ebeltoft**
Group Expert
Comment

Infarm is a truly sustainable approach to food cultivation. The cultivation method not only pays off in terms of the freshness and taste of the products and the environmental impact but is also positively perceived by customers. The world of food retailers and restaurants will certainly have to remember the name Infarm.

Spain

# SKFK

## Change of focus to sustainability

20-year-old alternative and niche apparel brand Skunkfunk evolves into SKFK, a sustainable focused concept with a more feminine style. Their clothing is sold in 38 countries, mainly in multi-brand stores. SKFK also owns 18 mono-brand stores and an online site.

Their founders felt the need to change and SKFK new approach to fashion is sustainable and ethical from a holistic point of view: transparency of raw materials, where and how clothing was made –fair and certified production, CO2 reduction…-; timeless designs, slow fashion, two seasons/collections per year, transport by boat; circular approach: awareness, growing in recycled raw materials vs. virgin, repair workshop for customers, customization of old pieces...

They collaborate with likeminded companies and designers and raising awareness among consumers is also a priority for SKFK.



**KEY DATA**

**Country:** Spain
**Retailer:** SKFK
**Format:** Sustainable fashion brand

## WHY IS IT INNOVATIVE?

Some of the innovative actions that set them apart are:

- **"circular closet"**
  They have launched a rental system in addition to selling their clothing to raise awareness about low use of apparel and waste generation. A customer can rent the outfit they choose for 39€ per month.

- **Marketplace**
  On their e-commerce site they have a section for other sustainable local brands in order to collaborate and help likeminded designers with less commercial resources.

- **Transparency**
  Carbon footprint calculator on their web for every piece of clothing. It shows detailed information of carbon footprint in each step of the process and commit to keep reducing their footprint.










## Ebeltoft Group Expert Comment

With the right decisions and actions, a long existing company can become sustainably focused. We are not talking about campaigns or special collections, but about a deep change in the values of a company.

Switzerland

# Ugly Fruits

## the retailer that sells unwanted fruit online

This company sells via their online channel bio/organic vegetables and fruit that do not fit the criteria to be sold in big retail stores. The customer can customize his basket according to his needs and he can also make an "ugly gift" to someone, which means that he/she can send a basket with biological food to someone. There are four different basket sizes and the offered vegetables and fruit change every week. Moreover, the company presents a new sustainable initiative every Thursday. Also, their packaging is without plastic and a 100% recyclable.




**KEY DATA**

**Country:** Switzerland
**Retailer:** Ugly Fruits
**Format:** Online Shop

## WHY IS IT INNOVATIVE?

- 30% of the farmer's products cannot be sold to big retailers because of their looks/weight etc. Ugly Fruits saves this food from being thrown out by selling it online to local customers.
- Also, the baskets are customizable. There is even a business solution.
- The food comes directly from local vendors and therefore the CO2 emissions for the food delivery is lower.
- The food is being local and biological and has a lower price then biological food in supermarkets even though it is being delivered to the customer's home.
- The packaging is without plastic and a 100% recyclable.






## Ebeltoft Group Expert Comment

COVID-19 has increased the consumers' conscious about local/biological food but has also amplified the trend of price sensitivity. Moreover, online purchases are getting more normal. Therefore, Ugly Fruits is able to reach customer's needs better than other retailers with its unique Business Model, as it sells biological food online to a lower price than fruit and vegetables in a supermarket.

France

# Veja x Darwin

Since 2005, the French footwear brand VEJA provides a unique approach in sneakers designs, combining social projects, economic and social equity and eco-friendly fabrics.

On June 25th 2020, the brand has opened a 250 sqm store in a famous former military barrack called Darwin in Bordeaux.

VEJA chose this hybrid 90 000 sqm place that brings together 50 associations and 200 companies breaking the traditional way of integrating art, trade, culture and sports.

Clean, repair, recycle : here are the 3 main objectives of the VEJA x DARWIN concept conceived to test a shopper lab and shape the "store of the future". In a shoemaker's workshop called « Cordonnerie Veja » worn sneakers are repaired and cleaned while those in poor conditions are collected and recycled. Also, Veja has displayed various items such as prototypes never launched, sneakers with minimal defects at reduced prices and a few pairs of old collections. Furthermore, the store elements are locally sourced and the place enjoys a 100% renewable electricity.



**KEY DATA**

**Country:** France
**Retailer:** Veja
**Format:** City Store

## WHY IS IT INNOVATIVE?

Sustainability from products to location:

- **Products**
  Reduced prices on minimally defective shoes, recycled sneakers
- **Services**
  « Cordonnerie VEJA » repairing & recycling old pairs, cleaning service
- **Location**
  The store is in a former military barrack using locally sourced wood elements and 100% renewable electricity, which offers an unordinary customer experience.






**Ebeltoft** Group Expert Comment

When sustainability is becoming a main key in decision-making “to buy” for customers VEJA chose a hybrid place to test and shape its vision of the « store of the future ».

High-end brands as well as middle range ones, are considering eco-friendly products and actions more than ever.

Veja embodies these values since its creation as a trendsetter and shows once more with this concept a consitent approach in sustainable practices.

Romania

# WooBa
## reinvention of learning

Under the mission of reinventing the learning process and bringing smiles on children's faces, WooBa uses intelligent design, 3D printing technology and recycled wood to create educational toys, lighting and furniture. The customers assemble the products at home and there are several kits designed for kids of various ages.

At the moment, there are 3 categories of products depending on the age: Easy (over 6 years old), Medium (over 8 years old) and Complex (over 12 years old). The team designed different construction kits with the help of a math teacher.

WooBa also creates customized products and has in plan with the money raised to bring creative workshops in schools from underdeveloped areas.

Their website will launch on the 5th of November. Until now they have been promoting and selling their products on startarium.ro, a crowdfunding platform and by using social media.



**KEY DATA**

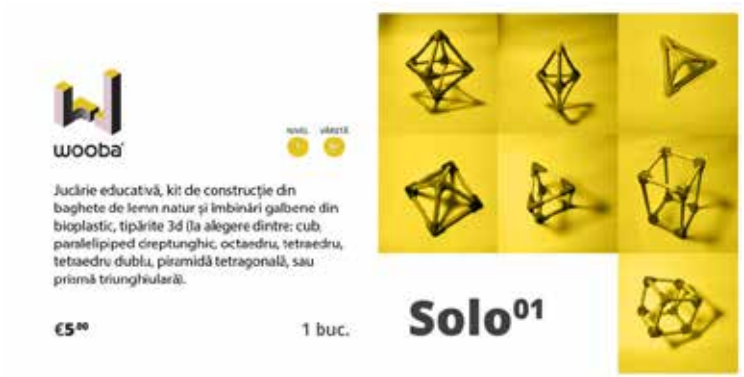
**Country:** Romania
**Retailer:** WooBa
**Format:** Online platform

## WHY IS IT INNOVATIVE?

- WooBa sells toys so that children can learn and develop through play. The products are also labeled by the appropriate age of the children assembling them
- The products have different prices depending on their complexity and the number of pieces in the kit
- Sustainable materials used in the production process
- Their first product created at the beginning of 2018 was a cube, followed by various geometric forms, designed in collaboration with a math teacher
- They also create custom objects, alongside with interior design projects and workshops for children






## Ebeltoft Group Expert Comment

By using recycled wood and 3D printing, WooBa is reinventing learning and is offering a sustainable alternative to the classical toys. The products have embedded intelligent design, sustainable materials and an efficient production process with low costs, hence allowing the team to reinvest a part of their profit and even organizing pro-bono workshops or donating toys.

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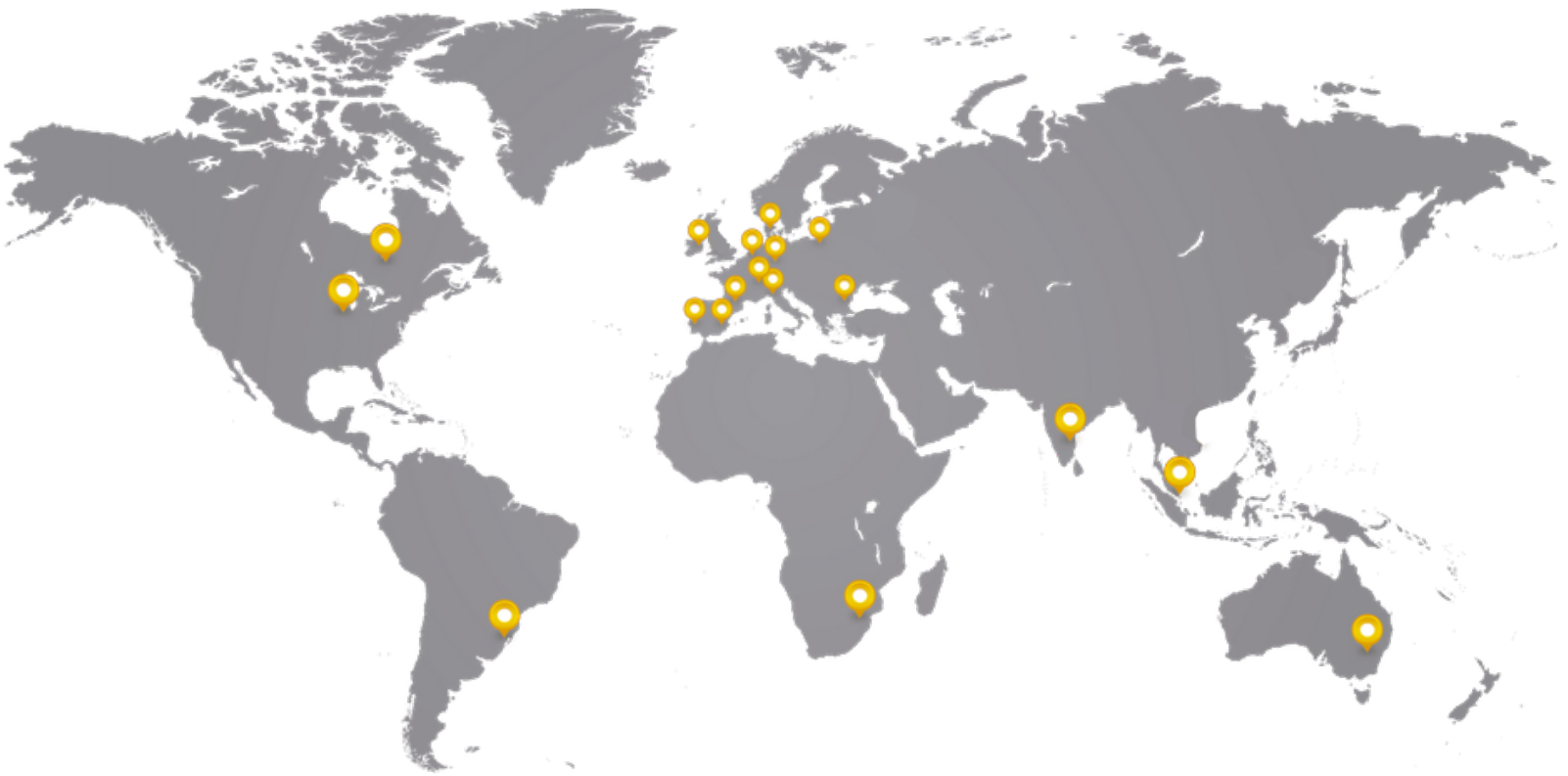
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# Notes

# 2021

## Global Retail Trends & Innovations

### INNOVATING FOR CUSTOMERS

Ebeltoft Group has been tracking innovative retail concepts across the globe for more than 15 years. 2020 was an exceptional year: Covid-19 put the (retail) world upside down. But any crisis is also an opportunity to rethink and reinvent yourself. Some of the most important trends that accelerated during the pandemic  are the need for omnichannel integrations, digital engagement, convenient solutions and sustainable practices. Moreover, the importance of ecosystems and collaborations within and between industries increases.

The top 50 innovative retail cases include radical, game-changing formats and incremental innovations of traditional retailers. The 18 member companies of Ebeltoft Group witness this through consulting projects across all regions, formats, and industries. Retailers are racing to create new formats, offer new added values, and explore new frontiers. This publication highlights a selection of these bold initiatives.

If technology remains a major driver for innovation, it must be applied usefully to serve consumer needs. The Retail Innovation 2021 book clearly shows the relevance of involving the customer in the innovation process. Most of the innovations showcased in this issue rely on a deep, intimate understanding of customers' needs, desires and shopping behaviors.

The pandemic will change our lives and shopping behavior forever. But how?

What kind of innovations does the future hold?

How can you adapt your business successfully?

Get started and get inspired by our global top 50 innovative cases!

Ebeltoft Group
Global Brand & Retail Experts

Ebeltoft Group is a global alliance of retail and brand consulting firms with more than 30 years of experience. Ebeltoft enables to carry out international projects, combining the geographical and sectorial expertise of other members of the network. The group offers consulting services such as strategy consulting, consumer research, category management, branding, store planning and internationalization. Ebeltoft Group conducts annual global research and trend studies in retail by combining global best practices with in-depth observations from local retail markets. This study provides our partner members with the latest insights, tools and global developments.

Ebeltoft Group works extensively with:
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28 of the top 50 retailers in Europe
24 of the top 50 retailers in the US
21 of the top 50 manufacturers worldwide

For a personal presentation about current retail innovations, trends and cases, or information about our latest global publications, research and services, please contact Ebeltoft Group or visit www.ebeltoftgroup.com.