



Hello **DPD!**

# New Commerce

Always More and Even Less

Delve into European consumers' lives



# Hello Jean-Claude!



## Jean-Claude Sonet

Executive Vice President, Marketing,  
Communications and Sustainability  
GeoPost/DPDgroup

We're at the heart of a world that is changing before our eyes.

DPDgroup has been on the front line of everything the world has been experiencing since the winter of 2020. On a personal level, as individuals, but also on an industrial level, as these are times of great responsibility and shifting expectations for our professions as delivery experts.

This change is beyond everything we've been measuring every year since 2016 with the DPDgroup e-shopper barometer\*.

It is a unique moment in its transformative power, its creative potential, its systemic dimension and even, at times, its violence. It is a moment when all the signals of global, structural transformation are accelerating and escalating. And it is the time we have chosen to initiate a vast Human Centered Design programme to reinforce the importance of the human element in each of our initiatives.

We began by capturing the moment in all its cultural, environmental and social diversity. To grasp, from a human perspective, the foundations of this new reality now manifesting itself in homes, in behaviours,

in new uses, values and aspirations. And in slices of life, gestures, reflexes and details that are anything but anecdotal.

To achieve this, experienced ethnologists observed European consumers in their daily lives as they expressed their individual behaviours and relationships with consumption, brands, shops and services via digital and traditional channels across Europe.

I would like to thank all these consumers who kindly opened their doors and shared their private habits, opened their wardrobes, kitchen cabinets, living rooms and even browser histories, with honesty and generosity. And it is in this spirit that we now share with you what they have helped us understand.

While this data will benefit DPDgroup, our hope is that the findings and lessons of this comprehensive sociological study will provide insights to all those who are driving the shift to the New Commerce.

\* DPDgroup's annual e-shopper barometer report analyses the trends of e-commerce and the behaviours and habits of shoppers in Europe. The data are gathered through blind, online interviews with, on average, 25,000 participants across 22 European countries.

# Hello Anne-Laure!

Design thinking, the trendy word for human-centered design, has become part of the innovation lingo in the last decade or so – since the publication in 2009 of “Change by Design” by Tim Brown, CEO of IDEO at the time. Beyond the trend set by this publication and a few others, the human-centered design approach, which has a history that dates back to the 1950’s, has a proven track record of creating more sustainable and meaningful innovations.

Indeed, its conceptualisation of innovation as an iterative process, grounded in a deep understanding of context and thoughtful attention to the needs of people—users, customers, as well as service providers—allows companies to move away from the notion of technology as a magic bullet. This does not mean denying the possibilities of technology, but rather understanding its possibilities in the context of use, recognizing the multiplicity of cultural interpretations and individual variations.

## The innovation value of ethnography

A human-centered design approach to innovation starts with humans, their practices and needs; some that they can articulate and others that they may not necessarily be aware of. This is why ethnography is an important discipline within the methodological toolkit of human-centered design. It provides the tools to decipher the unmet needs and the subtle variations across boundaries – occupational, socio-economical and geographical. Ethnography reminds us that what people say they do, what they think they do and what they do are not always aligned. By spending time talking to people, living with them and observing them, we can develop a deeper understanding of their life and work practices.

For instance, Intel in the late 1990’s hired the cultural anthropologist Genevieve Bell to lead their social-science research lab. Bell and her team travelled all over the world to understand how people use technology from computers to phones and other devices. One might wonder what the value of these ethnographic studies was for a company which does not sell products directly to



## Anne-Laure Fayard

ERA Chaired Professor of Social Innovation,  
NOVA School of Business and Economics

Professor of Innovation, Design and Organizational  
Studies (on leave), NYU Tandon School of Engineering

their customers. What Intel understood was that they needed to take a system approach in order to generate value for all stakeholders within their ecosystem. Hence, the ethnographers’ insights helped Intel’s engineers and developers design chips to power new devices and allowed Intel to enter new markets. For instance, Bell’s studies of people’s behaviours watching television in their living room, and how they differ from the experience of sitting in front of a computer, were essential for Intel’s move into the smart-TV market.

**HelloDPD!** is a great example of the value of taking an ethnographic approach to bootstrap the innovation process. Rather than taking a standard focus-group approach to analyse people’s experience with online deliveries, DPDgroup and innovation firm Supper engaged with customers across six countries, aiming to develop a deep understanding of their behaviours, emotions and values when it comes to purchasing and consuming. The study, which provides a rich description of practices, needs and motivations, illuminates interesting similarities and trends across

Europe. Even more intriguing are the tensions – for example “Always More” vs. “Even Less” behaviours – that emerged across and within geographies. These tensions, which tend to be ignored by more traditional approaches, are essential to innovation: they are the insights that trigger ideas for developing meaningful and sustainable products, services and business models.

# Introduction

## A pressing need

When COVID-19 swept across the globe, it accelerated the shift towards a more digital world and generated a wide array of new online purchasing behaviours almost overnight.

In early 2021, the decision was made to analyse these pandemic-influenced shopping behaviours across Europe in order to gain a fuller understanding of who today's consumers really are, what motivates their actions, what they want from their purchasing experience and how professionals can meet their needs and hopefully exceed their expectations.

The results of the study highlighted an exceptional phenomenon: New Commerce.

## New Commerce

New Commerce is the result of the liberation from restrictions in technological, logistic and economic areas. Time, place and accessibility are no longer constraints for consumers and businesses. This allows new relationships between people, brands and products to be built every day.

New Commerce is the fusion of traditional commerce and e-commerce and is far more powerful in its transformative potential than the mere combination of online and offline. It has already rendered the channel approach and even the notion of omnichannel obsolete.

This societal evolution is impacting commerce in all its forms in a reciprocity of influences between brick and mortar, digital and consumer relations. And the beating heart of this revolution is human. Freed from yesterday's constraints, the needs and desires of today's consumers are unimpeded. Flooded with new reference points, they flourish through new, sometimes contradictory behaviours.

For these reasons, rather than producing a prosaic report on this New Commerce, it appeared useful to illustrate the complementarity of these new modes of consumption by dividing the most significant and revelatory behaviours into two categories: "Always More" and "Even Less".

## Always More and Even Less

"Always More" behaviours include the major characteristics of unrestrained consumerism, a long-standing trend further accelerated by the pandemic – and one of its major consequences: the widespread and systematic use of e-shopping.

"Even Less" behaviours are in search of individual comfort largely driven by digital technology and sustainable respect for humanity and the environment.

As "Always More" is a factor in the emergence of "Even Less", it seemed logical to present them in this order, and in the way they were lived, in real time.

The study covers two weeks of consumer behaviour by highlighting a different trend each day. Participants are followed closely in their shopping activities, from early in the morning until late at night, buying, browsing or even selling, according to their various, sometimes paradoxical, habits.

These two trends are intertwined. Their boundaries are shared as they are driving a single movement particularly conducive to transformation, innovation and the emergence of new brands, services and professions: the New Commerce.

# Key takeaways



## Acceleration

COVID-19 fast-forwarded e-commerce usage among consumers around the world almost overnight, accelerating existing purchasing behaviours and favouring the emergence of new, and at times polarised, online and offline buying behaviours.



## Consumerism

"Always More" shoppers are characterised by exacerbated and unrestrained consumerism. They are guided by their emotions. Their purchasing patterns may go so far as to resemble addiction.



## Responsibility

"Even Less" shoppers are defined, on the contrary, by their view of slow retail as a form of re-humanised consumption. Frugal buying and favouring local over distant are calls for simpler living.



## Contradictions allowed

No single behaviour is an absolute; all behaviours overlap somewhat. "Always More" shoppers may occasionally exhibit "Even Less" characteristics, and vice-versa.



## Sustainability

Demand for greener initiatives and more sustainable modes of consumption is growing everywhere. All consumers—even those characterised as "Always More"—desire reassurance about the ability of companies to have positive and lasting impacts on social structures, the environment and the economy today while protecting the ability of future generations to meet their own needs.

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# Ethnologists

The six ethnologists who carried out the study are all highly experienced observers of consumer trends. Each one has a perfect command of ethnographic participatory observation techniques. They are the guarantors of the quality of the collected information, placed in the cultural context of the interviewees.



## Daphnée Dunkley

has 20 years' experience in international market research. She specialises in B2C and B2B studies in diverse areas including sustainability trends, modesty in dress codes among British Muslim women and the difficulties of senior citizens with regard to ageing and care home services. Her expertise in online focus groups and in-depth face-to-face and online interviews enabled her to draw profound insights from participants in Italy.



## Emmanuelle Marc

is an ethnologist, sociologist, and Director of Studies in Barcelona. She has extensive experience in immersion in major international research institutes and B2C and B2B targets on issues of research insights, branding and innovation. She led our study in Spain, where her talents allowed her to enter the lives of e-shoppers and identify their pain points, practices, and aspirations.



## Samuel Guégan

is an ethnologist and pioneer in the field of investigative marketing, where he uses off- and online ethnographic tools to understand human experience as it relates to brands. His experiences in immersion sites, including international coordination of projects for Clarins, Kingfisher, Adéo, and other major brands, prepared him to lead the study in France. He is Research Director at Supper Paris, and Director of Studies at Co-Meet



## Claire Parham

is an Oxford-educated qualitative researcher and ethnographer with 20 years' experience working with major brands across markets from China to Australia, and West Africa to the US. She led the United Kingdom study, where her expertise in ethnographic methodologies and helping consumers articulate and understand behaviours was indispensable to the project's success.



## Ursula Kloé

wears many hats: she is an award-winning sociologist, psychologist, and qualitative market-researcher. She's also a renowned consultant who specialises in New Mobility, sustainability and future trends. She's a design thinking coach, a university lecturer, and Co-Founder & Managing Partner JU-KNOW GmbH. Her innovation and insights were invaluable while leading the study in Germany.



## Dr. Ewa Widlak

is a qualitative and quantitative analyst with lengthy experience in cross-national studies. She led the study in Poland. She works with national and international public institutions, multinational companies and NGOs, and has carried out market research projects in fields as diverse as mobility, beauty, consulting, banking and defense. Her main area of expertise is gender equality in the workplace.

## Methodology

- The ethnographic immersion was carried out remotely, allowing the examination of individual circumstances, exploration of contexts and practices, and sharing and viewing other practices and methods of consumption.
- New Digital Ethnography was organised in six European countries (France, Germany, Italy, Poland, Spain and the United Kingdom) and coordinated by a team of six ethnographers
- 72 participants (12 from each country) were selected according to criteria such as age, gender, household composition and digital tool use and observed by the ethnographers
- Stage 1: Ten days of collective immersion on the Facebook platform, where the ethnographers lead local communities. Due to the social nature of the platform, the participants felt at home in these communities, where they shared personal photos, videos and exchanged anecdotes.
- The ethnographers also guided the participants as they kept daily purchasing diaries, noting everything from product type, quantity, and delivery option.
- Stage 2: In-depth, hours-long one-on-one interviews with each of the 12 participants from each country were held, in order to explore the aspirations, obstacles and perceived benefits for each participant with regard to behaviours observed during stage 1.

# Always More

## An appetite for consumption

Numerous interrelated behaviours were identified during the study of European shoppers, part of the same prevailing and multifaceted “Always More” trend.

This type of consumerism is unrestrained and exacerbated; many of these consumers are impulsive and may lose all sense of time and place as they indulge in a frenzy to purchase anything anywhere at any time, dehumanising the act of buying and mostly favouring the lowest prices. These consumers may lack the necessary control to stop purchasing, even if it becomes harmful, emotionally or financially. Their behaviour is driving an acceleration of commerce where fluidity, nomadism and speed are the norm.

## 7 key behaviours

Monday, the first “Always More” consumer behaviour we focus on is **FOMO (Fear Of Missing Out)**. Shoppers who display this behaviour are constantly online, driven to be first to get deals and bargains. They disclose what makes them tick and the tricks they use to be sure they’re first in line for the best deals.

Tuesday’s consumers, whether under the influence of **FOMO** or not, practice **phygital ubiquity**: they like to be everywhere at once, both online, in the digital world and offline, in the physical, bricks-and-mortar world. Their journal entries describe how their practices tend to mix the best of both worlds and offer them advantages.

“Always More” behaviour requires a **fluid journey**. The heart’s desire of Wednesday’s consumers is a seamless, simplified purchasing experience. Tech-savvy, these shoppers are sophisticated and know what they want before they start shopping.

Thursday’s behaviour, **dehumanised purchasing**, takes tech a step further: these consumers prefer dealing with machines/robots over humans when shopping online, as they find them more reliable, trustworthy and less prone to disappointing them.

In Friday’s entries the link between appetite for increased functionality and **brand agnosticism** becomes clear. Consumers who embody this behaviour are turning away from “known” brands and are instead seeking creative solutions to obtain the best price-functionality ratio items and deals.

But this search for functionality in purchasing doesn’t negate the search for fun in the act of purchasing. That’s how **retail-tainment** behaviour works. Saturday’s entries show how some consumers view shopping as a pleasurable activity that extends beyond mere purchasing to become true entertainment.

## Powering change

Finally, on Sunday, consumerism takes the ultimate level as **retail-tainment** steps into the **home as a new marketplace** (if only in spirit). These comfort-loving consumers enjoy all the pleasures of shopping without ever leaving their home-sweet-homes, trying on clothes with partners or friends while listening to music, watching videos, never worrying about crowds or feeling judged by others.

“Always More” consumers are a boon to New Commerce because they drive competition, and forward-thinking businesses are responding with new offers and services designed to meet their expectations and creatively address their dissatisfactions.





# FOMO

## Fear Of Missing Out



## Ethnographic behaviour analysis

“ FOMO (Fear Of Missing Out) behaviour, first identified in 2004, intensified with the explosion of social networks and the ubiquity of mobile phones equipped with notification apps for everything from news, gossip and price drops, consuming users’ attention capital. FOMO consumers may display some of the characteristics of addiction: dependency, anxiety, loss of control, sacrificing social relationships for transactions. They may be driven by a sense of real or imagined fear and urgency and feel a need to make frequent purchases or engage in bursts of frenzied buying. They can spend hours online every day exclusively engaged in shopping-related activities, frequently checking their phones (up to 200 times or more, even at night) for price reductions or promotions. Accessibility and convenience are crucial: they must be able to shop from anywhere at any time to not miss out on deals. Some subscribe to newsletters to stay in the loop and be notified about private sales. They are active on social media so they can regularly check their feeds for news, but this activity can also extend to a need to boost self-esteem by posting photos of “premium” purchases (high tech items, luxury items) in the hope of obtaining “likes”. ”

Claire Parham, Ethnologist



Seb, 28  
Travel agent, UK



Lou-Anne, 24  
Property sales representative, France



Giulia, 24  
Student, Italy



Piotr, 51  
Freelance gig worker, Poland



Karolina, 30  
Telecare assistant, Poland




Antonino, 30  
Machine operator, Germany

# Week 1

## Monday

6:00 – Manchester, UK  
**Seb, 28, Travel agent**  
 06:10  
 “I got up early today to go on an auction site and scored a great deal on folding chairs. An absolute steal! I check out lightning deals every single day. I just can’t pass those up.”

10:00 – Karlowice, Poland  
**Karoline, 30, Telecare assistant**  
 10:35  
 “I’m so happy, the courier just dropped off my new – well, vintage – dress from Vinted! I track all my parcels, and it was right on time. That’s important, since I order up to twenty a month!”



**Seb, 28**  
 Travel agent, UK

“ I check out lightning deals every single day. I just can’t pass those up. ”

13:00 – Bönen, Germany  
**Antonio, 30, Machine operator**  
 13:20  
 “I set price alerts so I won’t miss promotions on things I need, and they really work! Today I got the baby monitor I wanted at half price. It’ll be here tomorrow with our monthly order of diapers.”

18:00 – Warsaw, Poland  
**Piotr, 51, Freelance gig worker**  
 18:15  
 “My passion is caring for cats in an animal shelter. They need tons of food and other things, so I check all the pet care sites daily to nab the best deals whenever and wherever I can get them.”

## Key learnings



Customers check their favourite sites **daily** so they won't miss out on deals.

Apps and platforms that offer access to **deals are a shopper's best friends.**





Shoppers search for what they want **wherever they want**, borders aren't barriers.



FOMO customers buy a lot, so give them loyalty cards. **They're worth it.**



Time of day is no obstacle to shopping, **so promotions should happen 24/7.**

23:00 – Brescia, Italy  
**Giulia, 24, Student**  
 23:40  
 “Just got the newest Adidas trainers, the ones with flowers on them! Who cares if I already have seven pairs? I just have to have the latest, the trendiest! It makes me feel amazing!”

01:00 – Paris, France  
**Lou-Anne, 24, Property sales representative**  
 01:05  
 “I’ll be tired tomorrow! I stayed up to be first at The Kooples midnight sale. I had to click and click and click until I finally got what I wanted, but I don’t care, getting the deal is what it’s all about!”

## Shoppers’ aspirations and needs

- Speed, reactivity
- Better stock availability
- Continuous access to services (anytime, anywhere)
- Next-day delivery whenever possible
- Multiple payment options (PayPal, Apple Pay, others)
- A wider range of delivery options
- More flexible courier wait times
- Live tracking to not miss out on deliveries

# Phygital ubiquity



## Ethnographic behaviour analysis

“Phygital ubiquity links the physical and digital worlds (the offline and online worlds), resulting in more immediate, interactive experiences for consumers. When phygital shoppers look for good deals, they look everywhere. They’ll spend a lot of time going back and forth between offline and online to find the best offers and tend to prefer marketplaces where they can access multiple vendors and compare prices. They appreciate price comparison tabs and other tools. When browsing online, they like to open multiple web pages so they can flick back and forth between them to better evaluate product specs and prices. They often go to physical stores to “pre-shop” items. They’ll then check for better prices on their mobile phones, sometimes even while still in the store, proving that the deal itself is more important than the merchant/brand.”

Daphnée Dunkley, Ethnologist



**Angie, 48**

**Travel agent, UK**

I’m mad about clothes. I visit the shops most every week to see what’s new and try on a few things. But I’m a savvy shopper: when I find something I want, I check my phone to see if I can get it online for less.



**Lillian, 22**

**Student, Germany**

I love shopping in real stores. But if the store’s too crowded, I’d rather look for an item online and buy it in different sizes or patterns to get one that suits me perfectly. I return lots of stuff, but I like having multiple choices.



**Łukasz, 36**

**IT account manager, Poland**

I enjoy shopping offline and online, but for different things. I prefer to buy clothes in stores to get good customer service, while I like online tech shops that have great customer feedback and good value for money.



**Angélique, 42**

**Management assistant, France**

I love to shop, both on the internet and in stores; I especially love shopping for my family. I don’t care about brands, but I do care about choice, so that’s what determines where I make my purchases.



**Ana, 30**

**Freelance podiatrist, Spain**

I don’t buy many things new. I buy second-hand items for savings and sustainability. I do browse on Wish from time to time to find a good deal. it’s fun and doesn’t make me feel guilty.



**Benjamin, 40**

**Operations manager, Germany**

I buy almost everything online – even groceries. It’s so quick and convenient. But I take the time to find the best prices. I don’t buy into loyalty schemes; it’s up to me to find bargains and deals.

# Week 1

## Tuesday

9:00 -

10:00 -

11:00 -

12:00 -

13:00 -

18:00 -


19:00 -

20:00 -

Piastów, Poland  
**Lukasz, 36, IT account manager**  
 09:05  
 "I bought new headphones for cycling in a shop, but only after reading lots of customer reviews and comparing prices to be sure I got the best deal."

Hamburg, Germany  
**Lillian, 22, Student**  
 12:35  
 "I ordered the same sweater online that I bought yesterday in a store. It was on sale at half price with free delivery as a bonus! I'll return the first one to the store tomorrow."

Derby, UK  
**Angie, 48, Travel agent (currently on furlough)**  
 17:50  
 "In the high street today, I nearly bought a fab dress for £44. But I thought, what if it's cheaper online? So I checked my mobile right in the shop, and found it for only £39! I do love a bargain."



**Lukasz, 36**  
 IT account manager, Poland

“ I bought new headphones for cycling in a shop, but only after reading lots of customer reviews and comparing prices to be sure I got the best deal. ”

18:00 -

19:00 -

22:00 -

23:00 -


00:00 -

Madrid, Spain  
**Ana, 30, Freelance podiatrist**  
 17:55  
 "I buy most of my clothes second-hand. But when I have to buy something new, I try one on in a shop, then use Google Shopping tab to compare prices and order the cheapest one in the right size. Like the swimsuit I bought today for vacation!"


Boussy-Saint-Antoine, France  
**Angélique, 42, Management assistant**  
 22:15  
 "I got a flyer from a local store about a sale on a microwave I want - so I put it on my Amazon wish list. I got a notification for the sale tonight and checked: the price was unbeatable, so I ordered it. Free delivery... tomorrow!"

Buchholz, Germany  
**Benjamin, 40, Operations manager**  
 00:10  
 "I'm a big fan of Levi's and I just got a 15% off coupon on their jeans. I ordered a pair for click & collect. I'll try them on and keep them if they fit or exchange them right in the store and keep the e-coupon."


### Key learnings




Shoppers never buy their first find: they always compare.



They search for coupons they can redeem for discounts when shopping online.



These shoppers are willing to wait to get the best value for their money.



They use digital tools such as shopping tabs and price comparison websites.

### Shoppers' aspirations and needs

- Getting the best deals (i.e., cheaper price points, best added value)
- Receiving frequent promotions, discounts codes, vouchers
- Access to private sales
- Free shipping deals
- Having the lowest minimum order quantity to get free shipping
- Being able to click and collect to avoid paying for shipping

# Fluid journey



## Ethnographic behaviour analysis

“ More and more shoppers seek a **fluid journey**: a seamless, simplified shopping experience that begins with easy site navigation and ends with issue-free deliveries and returns. These consumers are tech-savvy and sophisticated and want digital solutions at every touchpoint of their shopping journey as well. Prior to purchasing, they check ratings, read reviews and watch videos about products and services; they may also seek advice via digital chats with sales advisors. After a purchase has been made, they want live delivery and courier tracking and one-click returns. Ideally, everything should be done digitally, with the exception of delivery (unless to lockers, a solution that often avoids disappointments). ”

Samuel Guégan, Ethnologist



Vivian, 25

**Part-time operations manager, Germany**

Online shopping is in my DNA. When I find a cute dress or skirt on sale – especially if I have a code or discount coupon – I buy it. And if it's got good reviews on Instagram, I might buy two.



José, 47

**Computer scientist, Spanish teacher, Spain**

I'm big on comparison shopping. Other people's reviews and recommendations have a major impact on my purchase decisions. I like things to be logically organised so I can easily find what I want.



Silke, 51

**Bank clerk, Germany**

I adore online shopping. But I don't just shop: I write reviews, and I like and follow good brands. In exchange, I expect fast delivery and easy returns. I'll abandon my cart if I find a better price or delivery time elsewhere.



Natalia, 18

**High school student, Poland**

I'm a student, so I can't spend that much when I shop. But I still want quality and I'm a fan of good brands. So when I have my heart set on something, I keep track of it and wait for its price to drop.



Verdiana, 30

**Stay-at-home mother, Italy**

Shopping online makes life simpler for me – going to shops with two little kids is crazy! I use Siri to make lists, but I like Wish for browsing – and big stores like Amazon when I need something fast.



Monika, 32

**Systems analyst, Poland**

I'm rather picky when I shop online. I don't buy the first thing that catches my eye; I check reviews and prices first. Quality is important to me; so is ecology. I prefer 100% cotton clothes and recyclable packaging.

# Week 1

## Wednesday

8:00 - Hamburg, Germany  
**Vivian, 25, Part-time operations manager**  
 07:15

9:00 - "I bought new t-shirts from H&M. I already have a few, so I checked my order history on their app to avoid getting duplicates. History tracking is a plus. So is fast delivery! I love to buy but hate to wait."

10:00 -

11:00 - Radomsko, Poland  
**Natalia, 18, High school student**  
 10:35

"I got a fabulous pair of black leather Converse high-tops thanks to a notification from an app. It stores my size, my credit card and my delivery address. I just clicked to buy them and I'll receive them tomorrow."

15:00 -

16:00 - Hohen Neuendorf, Germany  
**Silke, 51, Bank clerk**  
 15:25

17:00 - "I'm invited to a dinner this evening. I have ordered flowers for the hosts, because my florist offers delivery in one hour."

17:00 -

18:00 - Madrid, Spain  
**José, 47, Computer scientist, Spanish teacher**  
 17:55

19:00 - "I finally bought all the books and games I've been adding to my FNAC cart over the last few weeks. I always check ratings and reviews before I buy. By grouping my purchases, I get free shipping."


23:00 - Rome, Italy  
**Verdiana, 30, Stay-at-home mother**  
 22:15

00:00 - "It's late, so I was able to ask Siri what was on my shopping list and ordered printer cartridges and aquarium cleaner without the kids begging for Legos as well! It's so easy and it'll all be here tomorrow."


Krakow, Poland  
**Monika, 32, HR systems analyst**  
 00:10

"I just bought shorts from a sustainable brand by scanning a QR code in a fashion magazine. They have live delivery tracking and free returns. They sent a return label with my invoice by email, just in case..."


### Key learnings




Faster delivery times can get buyers to switch from one store to another.




They have their data already saved for fast and easy checkout.




These shoppers often subscribe to notification apps for sales and promos.



These shoppers use digital wallets for payment and loyalty cards for benefits.



They want product returns to be easy (QR codes or one-click return).



### Shoppers' aspirations and needs

- Streamlined shopping experience
- Simplified access to customer service
- Speed and efficiency
- Next-day delivery
- QR codes for returns shipping
- Automated/monthly shipping subscription schemes
- One-click repeat purchase function
- Lockers for delivery

# Dehumanised purchasing



## Ethnographic behaviour analysis

“ Dehumanised purchasing displays a clear preference for technological shopping and purchasing solutions combined with a loss of trust/distrust of humans and/or brands. Consumers consider that humans are limited in their domains of expertise, constrained by time (not available 24/7) and can even slow down the buying process. Human contact is of little interest to them; they prefer dealing with machines/robots as they find them more trustworthy. These consumers are particularly interested in Artificial Intelligence because of the potential it has to remove the burden of choice and create personalised offers and services for them using intelligent algorithms. Because they avoid human contact, they seek alternative ways to get hold of the information they need. They rely on reviews and tutorials from customers like themselves to obtain a rational and functional shopping experience. Dispassionate when they shop, they view the internet merely as a tool to acquire the items they want or need. They read detailed product descriptions to get the fullest possible picture. ”

Samuel Guégan, Ethnologist



Angélique, 42  
Management assistant,  
France



Thierry, 52  
National police commander,  
France



Touria, 33  
Office worker trainee,  
France



Karolina, 30  
Telecare assistant, Poland



Seb, 28  
Travel agent, UK



Marco, 28  
Legal advisor, Italy

# Week 1

## Thursday

8:00 -

9:00 -  
Kartowice, Poland  
**Karolina, 30, Telecare assistant**  
08:30  
"Today, I bought clothes for my two-year-old and got some great bargains. I give my favourite websites her age and size and they send me alerts for sales and promos for everything I need."

10:00 -

11:00 -

12:00 -  
Boussy-Saint-Antoine, France  
**Angélique, 42, Management assistant**  
11:45  
"I got an alert about a bathing suit sale and bought two bikinis at half price with free delivery! I love getting alerts; they make finding bargains so easy. (Too easy, maybe: I want everything!)"

**Thierry, 52**  
National police commander, France

“ I compared many sites and I found FNAC, an electronics chain, had the best price and guarantee. My loyalty card gave me an extra discount as well. ”

16:00 -

Manchester, UK  
**Seb, 28, Travel agent**  
16:40  
"I bought two rather expensive polo shirts online. I checked masses of review sites before I did. The customers loved them, so that convinced me. So nice not to have to try them on in store!"

17:00 -

Longjumeau, France  
**Thierry, 52, National police commander, Longjumeau**  
17:10  
"I bought an e-scooter for my daughter's birthday. I compared many sites, and found FNAC, an electronics chain, had the best price and guarantee. My loyalty card gave me an extra discount as well."

18:00 -

## Key learnings

These shoppers trust consumer ratings more than salespeople's advice.

They like user-friendly sites where things are easy to understand and access.

These shoppers rely on their own research and analysis of products.

They want a seamless shopping experience from discovery and purchase to delivery.

They would appreciate more plentiful delivery points and locker delivery options.

22:00 -  
Lecce, Italy  
**Marco, 28, Legal advisor**  
21:40  
"I ordered five shirts while riding my exercise bike. It was that easy, just a few clicks. Good price, two-day delivery. But will the courier bother coming up to my 15th floor door?"

23:00 -

00:00 -  
Saint Ouen l'Aumône, France  
**Touria, 33, Office worker trainee**  
00:15  
"My cosmetic drawer's a disaster, so I binge-shopped at my favourite online beauty shops. I only bought sale items with home delivery. I hate waiting in line at pick-up points."

## Shoppers' aspirations and needs

- Access to reviews and ratings filterable by stars/quality
- Detailed product information, after-sales service, how-to guides
- Fast, convenient delivery are "must-haves"; next- or same-day delivery very desirable
- No extra effort wanted: parcels should come to buyer or his/her chosen delivery point (whether doorstep, lockers or via autonomous means in the future)



# Brand agnosticism



## Ethnographic behaviour analysis

“ Brand agnosticism is, in part, a response to the flood of options consumers are faced with when buying online. Saturated with so many choices, from white labels, store labels and new shops popping up daily, yet more informed thanks to online reviews and ratings, many consumers have abandoned their loyalty for brands in favour of a preference for advantages such as price, quality, innovation or convenience. These consumers are usually thrifty and spend time comparing and contrasting offers to find the best deals. They look for creative solutions to obtain top-quality items (handmade clothes, designer furniture) without paying the corresponding prices. They're tech-savvy and adept at using price sorting buttons and discount and promotional filters. These shoppers buy more marketplace brands rather than traditional ones, a cost-driven trend that's resulting in new customers for in-house brands. Interestingly, they may exhibit contradictory desires, such as wanting to support sustainable and ethical businesses yet still seeking to pay the lowest possible price. They also appreciate being able to buy directly from their social media feeds. ”

Ewa Widlak, Ethnologist



Silke, 51  
Bank clerk, Germany



Adam, 24  
Business consultant, UK



Victoria, 42  
Administrator, Spain



Toby, 27  
Financial project manager,  
UK



Verdiana, 30  
Stay-at-home mother,  
Italy



Stawomir, 45  
Production manager,  
Poland

# Week 1 Friday

7:00 -

8:00 - London, UK  
**Toby, 27, Financial project manager**  
07:35  
"I bought a great leather armchair on Facebook marketplace. I've seen the same chair in expensive brand-name stores, but I love finding bargains and don't mind if my chair isn't an original."

9:00 -


10:00 -

11:00 - Hohen Neuendorf, Germany  
**Silke, 51, Bank clerk**  
10:40  
"I was about to buy a shirt from Otto but saw it would take 6 days to get it. So I switched to another shop that had it with 2-day delivery. I'm not loyal to sites, I'm loyal to convenience."

14:00 -

15:00 - London, UK  
**Adam, 24, Business consultant**  
14:25  
"I went on Amazon and found the perfect backpack for my sister's birthday tomorrow, but Prime delivery wasn't an option. I ended up dropping the whole thing. Speed is everything!"

16:00 -



**Silke, 51**  
Bank clerk, Germany

“ I'm not loyal to sites, I'm loyal to convenience. ”

19:00 -

20:00 - Rome, Italy  
**Verdiana, 30, Stay-at-home mother**  
19:15  
"My tailor-made dress arrived from AliExpress. It was handmade in two weeks by a tailor in China and fits me like a glove! A brand name would have cost five times as much and taken a month!"

21:00 -

22:00 - Seville, Spain  
**Victoria, 42, Administrator**  
22:30  
"I browsed Amazon Marketplace and found two new local sellers I'll be visiting: a children's boutique and a bookstore. These large platforms give great visibility to smaller businesses."

23:00 -

00:00 -

01:00 - Radomsko, Poland  
**Śławomir, 45, Production manager**  
00:35  
"I buy almost everything from large e-shopping sites. I only have one or two things I buy brand names, and that's mostly out of habit. If I see a similar item on sale, I'll switch brands in a flash."

## Key learnings



These shoppers compare websites; they don't go directly to the biggest ones.



They use price sorting and discount filters to make their choices.



They'll switch websites to get a better price or faster delivery.



They try smaller/unknown brands on social commerce and marketplace sites.



These shoppers aren't very concerned with brand names/brand content.



### Shoppers' aspirations and needs

- Getting the best value for money
- Discovering new products and services via marketplace sites
- Being able to purchase from social media feeds
- Speed and efficiency
- Delivery services with clear timelines
- Multiple price options according to need

# Retail-tainment



## Ethnographic behaviour analysis

“ Retail-tainment is based on the idea that shopping is a pleasurable activity that extends beyond the mere purchase transaction to become entertainment. While in-store, shoppers look for activities where there is a specific emphasis on decor and visual displays. The same holds true for the online shopping experience. Retail-tainment consumers enjoy browsing for products without necessarily buying. It’s a way to keep busy, a bit like watching Netflix. Shopping can be addictive, as it has become a reliable source of fun and satisfaction. There’s also a social dimension for these shoppers, since they can meet like-minded shoppers who share their passion in the comments sections of vlogs as well as through second-hand apps such as Vinted. ”

Ursula Kloé, Ethnologist



**Angie, 48**

**Travel agent, UK**

I’m basically always online either on social media or shopping. It’s my passion. I love to browse shopping sites every day popping this and that in baskets. Sometimes I buy, most of the time not.



**Karolina, 30**

**Telecare assistant, Poland**

For me, online shopping is a bit of an addiction. I love to sit with a cup of coffee and visit my favourite stores to see what’s new and interesting. It’s pure pleasure for me especially if I’m feeling bored.



**Marco, 28**

**Legal advisor, Italy**

I’m a multitasker, so online shopping is ideal! It keeps my brain occupied while I give my body a workout on my spin bike. I can add to my wish list and even make purchases with just a fingertip.



**Toby, 27**

**Financial project manager, UK**

I like the finer things in life, above my means. I visit high-end shops to get inspiration for looks I want then browse online for items in my price range with a similar aesthetic. It’s a pastime I enjoy.



**Manu, 28**

**School monitor & Masters student, Spain**

Whenever I take a break from work, I browse through my fashion apps. It’s entertaining, like scrolling through Instagram. I can spend up to an hour a day looking at both new and second-hand clothes.



**Anna, 37**

**Kindergarten teacher, Poland**

My hobby is online window-shopping. I love to boutique-surf late at night just to look at clothes I fancy from my favourite shops even though I don’t usually purchase anything.

# Week 1

## Saturday

8:00 - Derby, UK  
**Angie, 48, Travel agent**  
 08:20  
 "My daughter and I e-shopped before school this morning, hopping from site to site, a bit like window shopping just between us girls. It's so much fun. She always falls in love with some little thing on sale, and I always buy it for her, of course!"

12:00 - Kartowice, Poland  
**Karolina, 30, Telecare assistant**  
 11:50  
 "Every time I take a coffee break, I scroll my favourite shops; it's like a drug! Today, I bought a sweet little dress on a site I love but only after I saw good reviews in the comments section."

15:00 - Lecce, Italy  
**Marco, 28, Legal advisor**  
 14:15  
 "I window-shop on my phone while eating lunch, it's fun and it passes the time. Today I bought a new video game I've read good reviews about online. Really looking forward to getting it!"

19:00 - London, UK  
**Toby, 27, Financial project manager**  
 18:35  
 "I was having ice tea and feeling bored when an advert caught my eye. A two-for-one sale on tee-shirts and denim! I don't really need anything, but getting a good deal gives me a thrill."

21:00 - Seville, Spain  
**Manu, 28, School monitor & Masters student**  
 21:30  
 "I just bought the leather jacket I've been wanting for months - last year's model but timeless. I love searching the internet for things I really want, even if it takes days or weeks: it's a game I love to play and win."

00:00 - Brok, Poland  
**Anna, 37, Kindergarten teacher**  
 23:45  
 "I've just settled in for a delicious hour of scrolling through my shops to see what's new and trendy. No purchases tonight but I did put a few things up for sale on Facebook marketplace."

### Key learnings

-  These shoppers spend hours browsing and scrolling through pages and pages of products.
-  It involves social media such as Instagram, Facebook or Pinterest.
-  They create shopping lists they add to as a way to remember items they fancy.
-  It is linked to enjoyment (anti-boredom) and relaxation (can be done on the sofa, in bed...).
-  Retail-tainment is an authentic activity: a way to entertain oneself and have fun.

### Shoppers' aspirations and needs

- Regular home page updates to maintain shopper interest
- Fast shipping (part of the pleasure of purchasing is having quick access to chosen items)
- Most popular items/trends highlighted on home page
- Free delivery (as "reward" for waiting until they have enough in their basket to qualify for free delivery)
- Simplified/highlighted discovery of new products
- Ability to save shopping baskets for later purchase

# Home as a new marketplace



## Ethnographic behaviour analysis

“ Home seen as a new marketplace expresses disenchantment with physical sales spaces (difficulties with transportation, parking, queuing, searching shelves), now further exacerbated by COVID-related sanitary measures. Consumers think of the home as their personal logistics platform for delivery and shipment as well as, in many cases, their personal place of business/shop (C2C). This behaviour already existed, but was greatly reinforced during COVID as shoppers began to practice social distancing and started to feel uncomfortable when in public places with others. Being able to shop from the comfort of home, avoiding crowds outside, began as a necessity which has turned into an ongoing practice. For these shoppers, their home becomes a dressing room (or a display window) where they can put purchases into situation: a new skirt or trousers with this or that top and shoes; a set of candlesticks on the table or mantelpiece. These consumers can also try on several items of clothing and return those they don't want. The home is safer, more comfortable, spacious and better lit. There are no restrictions on time or number of items as there often are in store changing rooms. And they don't feel judged by store personnel or passers-by. The overall experience feels more personal and reassuring. ”

Emmanuelle Marc, Ethnologist



**Monika B, 46**  
Legal and medical worker, Poland



**Lou-Anne, 24**  
Property sales representative, France



**Benjamin, 40**  
Operations manager, Germany



**Lorenzo, 30**  
Lawyer, Italy



**Silke, 51**  
Bank clerk, Germany



**Fabio, 30**  
Administrator, Italy

# Week 1 Sunday

9:00 –

Krakow, Poland  
**Monika B, 46, Legal and medical worker**  
09:00


“Every Sunday I pack up parcels of the second-hand clothes and items I sold on Vinted and Le Bon Coin during the week to take to the post office the next day. If only a courier could come and collect them here at home!”

10:00 –

Rome, Italy  
**Lorenzo, 30, Lawyer**  
11:35

“The clothes my girlfriend and I ordered arrived today. We really like being able to try things on with the shirts and jeans we already own. That’s one of the big advantages of online shopping.”

11:00 –

 **Benjamin, 40**  
Operations manager, Germany

“ I ordered a week’s worth of groceries, sold some old books and bought new tyres, all while sitting on my sofa. ”

12:00 –

Hohen Neuendorf, Germany  
**Silke, 51, Bank clerk**  
16:40

“My new dresses arrived today. It’s such a pleasure to try things on at home where the lighting is flattering instead of in store changing rooms where everyone looks awful in everything!”

16:00 –


Bari, Italy  
**Fabio, 30, Administrator**  
19:15

“Got myself a pair of rare Nike Dunk trainers today! I was home, zapping between my laptop and phone, watching the bids, waiting, hoping, and I WON! I can’t wait to unbox them!”

17:00 –

20:00 –


## Key learnings



These shoppers prefer browsing and shopping in the comfort of their homes.




They share e-shopping activities with their partners as a joint activity at home.



These shoppers watch videos and search for inspiration before buying.



They enjoy the act of receiving and unboxing their products at home.



They like to try items on at home then decide whether to keep or return them.

22:00 –

Paris, France  
**Lou-Anne, 24, Property sales representative**  
22:10

23:00 –

“I ordered a dress in three sizes and colours. In a shop, I’d feel pressured to try everything on fast, but this way, I can take my own sweet time until I find the one that’s perfect for me.”

00:00 –

Buchholz, Germany  
**Benjamin, 40, Operations manager**  
23:55

01:00 –

“Today, I ordered a week’s worth of groceries, sold some old books and bought new tyres, all while sitting on my sofa. I can’t see why people go out to shop when online’s so convenient!”

## Shoppers’ aspirations and needs

- Easy, efficient return policy in case items do not fit/please
- Couriers who pick up returns
- Prepaid return labels should be included to avoid shipping fees
- Ability to drop off parcels nearby for time-saving on returns
- QR codes for paperless returns
- Lockers for secure pickup and return

# Even Less

## Consume with moderation

The study of European shoppers identified many “Even Less” behaviours that lie at the opposite end of the spectrum from the first week.

These display a combination of actions and postures that tend to be more socially and ethically conscious than “Always More” characteristics – yet surprisingly, the two trends have overlap in several areas. Such behaviours have always existed, especially when we talk about collectives, second-hand, frugality, and a preference for quality over quantity. But today, the search is on for the best of both worlds, the digital and the sustainable. These journals reveal how consumers found ways to reconcile themselves to the necessity of e-shopping during the pandemic and beyond.

## 7 key behaviours

Monday’s **re-humanised** habits are a rational reaction to “Always More”, which was accelerated by the constraints imposed by COVID. Deprived of social interaction, some consumers want to “reinject” humanity into the purchasing process. Ethical values, transparency and fair treatment of all are vital to them.

From there, it’s a logical step to the **growing collective** trend featured on Tuesday. These consumers experienced a deep sense of isolation during the pandemic and now seek ways to belong to eco-conscious communities, through grouped purchases, for example.

On Wednesday, certain consumers explain how they reduce waste via the **second-hand and circular economy**. This behaviour focuses on buying and selling pre-owned items both for economical and environmental reasons, while offering a sense of community.

Thursday’s entries, **local over distant**, explain in why consumers favour local goods. The pandemic hurt many of their businesses, so they want to help them rebound. They also like the improved air quality lockdown brought, so they favour eco-conscious delivery.

Some of these behaviours also reflect Friday’s **slow retail** trend, a behaviour which leads consumers to reject the notion that consumption is ever “urgent”, for both environmental and personal reasons. Their journal entries show why they think haste is linked to waste.

That cleverly leads to Saturday’s trend, **quality over quantity**. Consumers with this behaviour tend to spend more on what they buy. They choose sustainable pieces that won’t go out of fashion or need to be replaced.

On Sunday, a predominant consumption typology emerges from the ensemble of these behaviours: **frugal and responsible**. This demeanor rejects overconsumption and favours a less materialistic way of life. These consumers care about the ethical and social behaviours of companies and believe any vision must be geared to the future.

## Closing the loop

“Even Less” consumers are the “consciousness” of New Commerce as they are spurring the growth of the circular, second-hand economy. Their demands for more sustainable products and engagement are changing the way companies do business today.



# Re-humanised purchasing



## Ethnographic behaviour analysis

“ The need for **re-humanised purchasing** can be directly linked to COVID and the confinements it imposed. During lockdown, the purchasing process was “de-humanised”, as most consumers were forced to make many of their purchases online, with little to no human interaction available. Consumers missed not only discussing and exchanging with store owners and staff and getting advice, inspiration and feedback when shopping (rather than just reading reviews and ratings); they also missed the sensorial aspects of the shopping experience itself: seeing, touching and smelling fabrics, produce or cosmetics before buying. Today, these consumers want to “reinject” the human element at key stages of the purchasing experience whenever it can add value. Just as importantly, within re-humanisation there is also the desire to give a new sense of purpose to consumerism. With COVID came the fear of an economic crisis, triggering a growing awareness among consumers about the impact of their purchases/investments on their local communities and their social and ecological responsibility as “consum’actors”. Ethical values and social transparency are of the utmost importance to these consumers, as they realise that behind every product they buy, there are many human beings all along the value chain, all of whom must be treated fairly. ”

Daphnée Dunkley, Ethnologist



**Polly, 25**  
Yoga instructor, UK



**Giulia, 24**  
Student, Italy



**Agnès, 56**  
Magazine editor, France



**Dieter, 57**  
Managing director,  
Germany



**Nati, 56**  
Administrator, Spain



**Vincent, 36**  
Customer loyalty  
manager, France



# Week 2 Monday

7:00 –

8:00 – London, UK  
**Polly, 25, Yoga instructor**  
07:25  
“A sale on sustainable yoga pants made in an ethically certified factory? I’ll be popping over to buy a pair and maybe to talk with the people there about where to find other eco brands.”

11:00 – Brescia, Italy  
**Giulia, 24, Student**  
11:15  
“I went to my favourite lingerie shop today. I know my sizes perfectly and could order online, but it’s so much nicer to try things on with an expert saleswoman who advises and assists me.”

15:00 – Paris, France  
**Agnès, 56, Magazine editor**  
15:10  
“I strolled through the BHV today. I didn’t really need anything – it was mostly for the pleasure of people-watching, seeing the latest fashions, testing a few perfumes. It was such a delight!”

## Key learnings

- They phone store or delivery customer service when they feel it's needed.
- They enjoy exchanging with like-minded shoppers in expert communities.
- They watch YouTube videos made by people they know for advice and tips.
- They like to establish bonds of trust with their delivery persons.
- These shoppers seek reassurance through customer reviews and ratings.

18:00 – Pinneberg, Germany  
**Dieter, 57, Managing director**  
18:35  
“After reading tons of five-star reviews, I bought a motorcycle repair kit on my favourite marketplace. My delivery guy will put it in a secret place in my carport if I’m not home.”

23:00 – Madrid, Spain  
**Nati, 56, Administrator**  
22:50  
“I went to a private sale tonight. There was just the right number of people – and champagne! I bought a gorgeous dress in the softest, silkiest fabric. A perfect shopping experience!”

00:00 – Le Mans, France  
**Vincent, 36, Customer loyalty manager**  
00:10  
“I visited some of my favourite clothes and home furnishing stores today. They both offer me the things I like most when I go shopping: inspiration, personal advice, and customised options.”

01:00 –

### Shoppers' aspirations and needs

- Putting the “human factor” back into the online shopping experience
- Helping people customise items if desired
- Being able to leave personal delivery instructions
- Knowing their delivery persons humanises online shopping
- Being able to phone or text their courier
- Having the same courier to develop a relationship of trust

# Growing collective



## Ethnographic behaviour analysis

“ Growing collective is a thriving new behaviour uniting consumers who experienced a deep sense of isolation and loneliness during the pandemic lockdowns. This loneliness took a toll on their mental and emotional well-being and triggered a desire to find new ways to share with others and feel like part of a group. As a result, these consumers are transforming their former digital-only buying/selling areas into places for meeting and exchanging based on common points of consumption or site frequentation (“What brings us together is our shared appreciation of the same products/the same vendors.”). Most of these consumers seek solutions to reduce the cost of essential items; some lost their jobs and main source of income during the pandemic and depend on such solutions to survive. They often grow their own food and sell or trade it. Group buying is a particularly interesting solution. It not only reduces costs through bulk purchasing; it enables the creation of social roles that promote self-esteem through usefulness to the group (the person who orders the bulk purchases, the person who picks up and delivers the purchase). Another member might play the role of “prescriber/influencer”, giving advice, while all members share their experiences within the community. The collective dimension also offers a rewarding aspect of “doing good”, i.e., caring about society at large: they’re eco-conscious and waste little. Some of these networks of fans are also finding a sense of social life in online communities dedicated to gaming, social media and other forums. ”

Ewa Widlak, Ethnologist



**Ilka, 51**  
Tour guide, Germany



**Caroline, 45**  
Business executive, France



**Juliette, 35**  
IT project manager, France



**Leslie, 28**  
On long-term sick leave,  
France



**Paul, 32**  
Design agency  
administrator, UK



**Vincent, 36**  
Customer loyalty manager,  
France

# Week 2 Tuesday




**Caroline, 45**  
Business executive, France


“ I just received my collective’s fresh meat order. Now to gather everyone for pick-up – but drinks and chitchat first, of course! ”

8:00 –	
9:00 –	<p>Hamburg, Germany <b>Ilka, 51, Tour guide</b> 08:25</p> <p>“A neighbour on Nebenan has too many courgettes in his garden; we have too many tomatoes. We set up a meeting to trade this afternoon, so we’ll both have ratatouille for supper tonight!”</p>
10:00 –	
11:00 –	
12:00 –	<p>Suresnes, France <b>Caroline, 45, Business executive</b> 11:15</p> <p>“I just received my collective’s fresh meat order from Rungis. Now to gather everyone for pick-up – but drinks and chitchat first, of course! Grouped buying is as much for fun as for savings.”</p>
13:00 –	
14:00 –	<p>Paris, France <b>Juliette, 35, IT project manager</b> 13:25</p> <p>“My four-year-old wants ballet lessons, so I looked around on MyTroc and found a lovely lady near my house who’ll teach her – in exchange for sewing lessons from me. Win-win!”</p>
15:00 –	
16:00 –	
17:00 –	<p>Hermon, France <b>Leslie, 28, on long-term sick leave</b> 16:20</p> <p>“I browsed through the Geev donation site today and found some really useful things for my kitchen. I love the idea of giving and getting things without creating anything new.”</p>


## Key learnings




These shoppers are socially, ethically and environmentally conscious.




They prefer sites where purchases can be grouped to benefit from lower prices.



The provenance and sourcing of their purchases is important to them.



They save several purchases for end of week/month to optimise parcel deliveries.



They care about avoiding individual purchasing as much as possible.

22:00 – Manchester, UK  
**Paul, 32, Design agency administrator**  
21:50

23:00 – “I placed an order with Good Club for my favourite organic foods. The fact that they sell fair trade, plastic-free, zero-waste products means so much to me, as an eco-responsible citizen.”

00:00 – Paris, France  
**Vincent, 36, Customer loyalty manager**  
23:45

01:00 – “I ordered a meal box from HelloFresh. The food’s delicious and affordable; there’s no waste; delivery’s eco-friendly; and I enjoy discussing the recipes with their online community.”

## Shoppers’ aspirations and needs

- Being part of a community that shares common interests
- Keep items in cart longer to group purchases for single delivery
- Accessing shopper discussion blogs/forums to get better deals and lower prices
- Group deliveries by areas/postcodes to save on delivery costs and reduce CO2 emissions
- Sharing tips and deals through social media and other platforms



# Second-hand and circular economy



## Ethnographic behaviour analysis

“Second-hand and circular economy is focussed on reducing waste (both in an individual and global sense) through procuring and selling second-hand items on the digital platforms and sites that specialise in them. Second-hand/Circular Economy consumers prefer used (or “pre-owned”, or even “pre-loved”) items because they are often cheaper, but also for ethical reasons, as giving a second life to things lets them avoid purchasing new things, a practice which contributes to heavy production lines. Their actions ultimately help reduce waste. Second-hand can also be a way for collectors and connoisseurs to find niche, rare and vintage items of which there are only limited sets available on the market, often at more affordable prices than new. Second-hand communities and reseller “tribes” offer a new type of social interaction where like-minded shoppers can meet and exchange.”

Ursula Kloé, Ethnologist



**Aleksandra, 39**  
Insurance consultant, Poland

I hate to throw things away, especially children's clothes and toys that are still in good condition. So I buy and sell a lot on marketplace sites. Second-hand shopping saves money and reduces waste.



**Josianne, 20**  
Tourism management assistant, Germany

Second-hand bargain-hunting is a sport for me! I scour all the small online vendors. I love the idea of giving items a second or even a third life. I enjoy selling, buying and swapping with my friends.



**Fabio, 30**  
Administrator, Italy

I'm a fan of luxury brands, but I always try to find what I want using second-hand apps instead of buying new. I can find niche items at great prices and be part of the circular economy at the same time.



**Jan, 40**  
Health coach, Germany

I love the concept of luxury vintage. The quality and look are great, so resale is possible several times. Otherwise, I buy from fair trade shops. Both take the impact on our planet into consideration.



**Faye, 41**  
Park warden, UK

I buy very little these days, apart from necessities. But I occasionally buy pieces of second-hand shabby chic-style furniture from small sellers I've gotten to know on marketplace sites.



**Juliette, 35**  
IT project manager, France

I'm a second-hand fashionista, so Vinted is my happy place! I've made over 1,000 transactions in the last four years there, both buying and selling. And not just clothes: toys, cosmetics, even nappies!

# Week 2

## Wednesday

6:00 –

7:00 – **Kozłów Biskupi, Poland**  
**Aleksandra, 39, Insurance consultant**  
 06:30  
 “Up before the children to go on my Facebook Marketplace page. I listed a handbag and a few other items, then bought an adorable party dress for my daughter. A good morning’s work!”

10:00 –


11:00 – **Leipzig, Germany**  
**Josianne, 20, Tourism management assistant**  
 10:10  
 “I check the online vintage clothing shops every day, and today I finally found a 70’s Pucci minidress I’ve been wanting absolutely forever! I may be the third or fourth person to own it.”

13:00 –

14:00 – **Bari, Italy**  
**Fabio, 30, Administrator**  
 13:15  
 “I check Depop’s online marketplace daily to see what’s new. Today, I bought some super-rare Air Jordans. I love knowing I’m one of the only ones in the world with these trainers.”

### Key learnings

-  These shoppers buy from second-hand websites or apps.
-  They are motivated by bargain prices and/or by the chance of finding rare items.
-  They enjoy bidding on items for sale and winning (sense of satisfaction).
-  These shoppers also appreciate the great value of second-hand luxury brand sites.
-  They avoid shopping with big companies and favour small merchants.



**Fabio, 30**  
 Administrator, Italy

“ I love knowing I’m one of the only ones in the world with these trainers. ”

19:00 –

Hamburg, Germany  
**Jan, 40, Health coach**  
 16:50  
 “I bought a leather Hermès jacket on a second-hand luxury brand site for far less than a new one. I think vintage is more chic than new, it has more character! I’ll wear it a while and maybe sell it in a few years.”

20:00 –

21:00 –

Derby, UK  
**Faye, 41, Park warden**  
 22:00  
 “I bought second-hand books on eBay, but from a private seller who’s a mum like me. I like knowing the money I pay helps her, plus I can buy more books than if I purchased them new.”

22:00 –

23:00 –

Paris, France  
**Juliette, 35, IT project manager**  
 23:05  
 “I just had a lovely chat with some of my favourite ‘Vinties’ – people who sell on Vinted. I like sharing the spirit and values of the second-hand community when I’m shopping online.”

### Shoppers’ aspirations and needs

- Ability to exchange and discuss/ negotiate directly with sellers (i.e., C2C platforms)
- Ability to find the best deals and find/ negotiate good prices
- Being able to see products (need for pictures & videos of items)
- Being able to pick the products up
- Being able to offer cash in hand to the seller
- Ability to have items delivered

# Local over distant



## Ethnographic behaviour analysis

“ Local over distant behaviour is exemplified by the desire for good quality products, safe products. For consumers who exhibit this behaviour, trust is an important factor when selecting products, therefore they tend to favour what's familiar to them, such as local goods, especially from sellers they know or have heard of from others within their networks. This behaviour was reinforced when country border closed due to COVID led consumers to face inwards rather than outwards. The pandemic also devastated local businesses: they lost a lot of their trade and these consumers want to help them prosper again. They're also aware of the improvement in air quality since the lockdowns due to reduced commuting and air travel, and want CO<sub>2</sub> emissions to remain low, so they try to avoid air freight; they favour eco-conscious companies that use minimal packaging and the smallest possible parcel sizes. ”

Emmanuelle Marc, Ethnologist



Łukasz, 36

IT account manager, Poland

Online shopping is convenient, but I try to visit my local businesses whenever I can. I'm worried about the environment and eager for any improvements in the ecological side of e-commerce.



Jan, 40

Health coach, Germany

I think I'm a very environmentally responsible person. I worry about the impact of logistics on air quality and want to aim for zero waste packaging. I appreciate delivery companies that think like me.



Kate, 32

Artist, Germany

Contributing to the local economy is part of my lifestyle. I definitely prefer going to real bookshops over buying online. I love the relationships I have with shop owners, the social aspect.



Aleksandra, 38

Insurance company consultant, Poland

I care deeply about the environment and try to shop responsibly. I know what's involved in the production of a single new pair of jeans, so I'd rather buy a recycled pair from a local seller.



José, 47

Computer scientist, Spanish teacher, Spain

I don't mind paying a bit more to help local businesses or markets. I've always been keen to help businesses in my neighbourhood or in nearby small towns; I think it benefits us all.



Juliette, 35

IT project manager, France

Although I do lots of my shopping online, I try to always buy from local e-boutiques. When I find something I want, I use the marketplace app to check the shop's location before placing my order.

# Week 2

## Thursday

8:00 –

9:00 –

10:00 –

11:00 –

12:00 –

13:00 –

14:00 –

15:00 –

16:00 –

17:00 –

Piastów, Poland  
**Lukasz, 36, IT account manager**  
 08:05  
 “I bought a new hard drive for my computer from Morele.net, a Polish electronics shop. I know them and feel I can trust their products more than those from the big international stores.”

Hamburg, Germany  
**Jan, 40, Health coach**  
 10:45  
 “My group went to a local farm today to buy organic groceries. We always use our own baskets and bags. We support the farmer while keeping packaging, logistics and price to a minimum.”

Kozłów Biskupi, Poland  
**Aleksandra, 38, Insurance company consultant**  
 14:20  
 “The kids outgrew their bikes, so I bought renovated ones from Decathlon. They’re committed to sustainability and climate issues. And they use recyclable packaging. I appreciate all of that.”

Madrid, Spain  
**José, 47, Computer scientist, Spanish teacher**  
 17:25  
 “I spent an hour in my favourite game store in Madrid and bought two new board games. I could have got them online for less, but supporting such a beautiful shop is worth the extra expense.”

## Key learnings



They tend to reject large multinational e-shopping platforms.



They dislike e-merchants that are based and ship from abroad.



They like companies that use recycled materials, both in goods and packaging.



These shoppers favour buying from local vendors whenever possible.

23:00 –

00:00 –

01:00 –

Hamburg, Germany  
**Kate, 32, Artist**  
 22:50  
 “I spent a bit more than I should on paints at Tube Künstlerbedarf, my local art supply store. But it’s so nice to browse there and chat with salespeople who know me and get my tastes!”

Paris, France  
**Juliette, 35, IT project manager**  
 00:10  
 “I just found my ‘twin’ running a vintage shop! She sells just the kind of clothes I love, with lots in my size. Plus, she lives in the neighbourhood, so I know I’m really supporting a local business.”



**José, 47**  
 Computer scientist, Spanish teacher, Spain

“ I could have got them online for less, but supporting such a beautiful shop is worth the extra expense. ”

## Shoppers’ aspirations and needs

- Desire for a common platform for local shops
- More transparency over work ethics
- Proof of local provenance via local and regional labels
- Desire to know more about history of companies to build sense of proximity and trust
- Desire for personal relationships with courier drivers
- Preference for national courier companies

# Slow retail



## Ethnographic behaviour analysis

“ Slow retail rejects the idea that consumption is ever “urgent”; for both environmental and personal reasons. These consumers disdain impulse purchases and draw a straight line from speed in consumption to pollution. They feel that taking the time to buy a custom-made article is an expression of eco-responsibility. If they want a particular item, they will search as long as it takes for that exact item, rather than accept a similar but immediately available one. They view their slow consumption as a personal quality but are aware it’s a luxury not afforded to all. Slow retail consumers have more free time, as the pandemic has created new flexwork patterns and reduced or eliminated commuting times. This free time has driven new consumer expectations and behaviours such as contrasting what is already owned against what is actually needed. This slower mindset has led to more comparison shopping as well. Slow retail shoppers rarely buy the first item they see, preferring to do lots of research, read reviews and watch unboxing videos before they make purchase decisions in order to make sound choices and avoid ecologically irresponsible returns. They also often reject fast delivery options. ”

Samuel Guégan, Ethnologist



Jan, 40  
Health coach, Germany



Ilka, 51  
Tour guide, Germany



Giancarlo, 55  
Real estate agent, Italy



Stefano, 42  
Export manager -  
chemical & pharma, Italy



Kiko, 34  
Civil servant with national  
police corps, Spain



Ana, 30  
Freelance podiatrist, Spain




# Week 2 Friday

7:00 - Hamburg, Germany  
**Jan, 40, Health coach**  
06:45  
"I discovered great sustainable cotton t-shirts online this morning. They're from an ethical, fair trade brand that protects textile workers. I chose 4-day locker delivery- perfect for me."

10:00 - Puglia, Italy  
**Stefano, 42, Export manager - Chemical & pharma**  
10:30  
"I bought honey from a local beekeeper today, and not just because I like to support my local merchants. I also took my time touring other apiaries and tasting their honey, but I'm really sweet on this one."

14:00 - Hamburg, Germany  
**Ilka, 51, Tour guide**  
13:50  
"I finally found the perfect cycling jacket. It took a while, because I wanted one that was light, breathable and made of recycled fabric. And it also had to be gorgeous, of course!"



**Kiko, 34**  
Civil servant with national police corps, Spain

“ I think I read every single review there was about safety, quality and fit. I can't shop in a hurry, especially for my baby. ”

17:00 - Salamanca, Spain  
**Kiko, 34, Civil servant with national police corps**  
17:25  
"I took ages to choose the life jacket I bought for my two-year-old daughter. I think I read every single review there was about safety, quality and fit. I can't shop in a hurry, especially for my baby."

23:00 - Monza, Italy  
**Giancarlo, 55, Real estate agent**  
22:50  
"I ordered some terrific handmade fishing lures from London. They could take up to two weeks to get here, but that's fine with me. You have to be patient to be a successful fisherman!"

00:00 - Madrid, Spain  
**Ana, 30, Freelance podiatrist**  
00:10  
"After looking for months, I found the armchair of my dreams on a second-hand site. It's a bit worn, but with new fabric, it'll be perfect! Postal delivery takes ages, but it's cheaper."

## Key learnings

-  These shoppers take their time when searching for items online (or off).
-  They only shop when they need something (not impulse shoppers).
-  They read reviews and compare sites to get the right items and avoid returns.
-  They care about companies' ethics and dedication to social responsibility.

### Shoppers' aspirations and needs

- Taking more time and buying less
- Enhancing the emotional dimension of slow and ethical fashion
- Humanising the shopping experience by linking it with social causes
- Alternatives to 24/7 connectedness and fast fashion
- Slower or longer delivery options at cheaper price or even free
- Shipping by boat rather than plane to minimise CO2 emissions

# Quality over quantity



## Ethnographic behaviour analysis

“ **Quality over quantity** involves an ongoing effort to reduce or eliminate the overabundance of possessions many consumers have amassed over time. People exhibiting this behaviour tend to scale back and buy only things they need, often preferring noble materials to plastics or synthetics. As a result, they shop little, but spend more on the items they do buy. They avoid trends, preferring timeless items. Because these consumers avoid acquiring too many possessions, they choose carefully and select sustainable pieces that won't go out of fashion/break or need to be replaced. They view quality as an investment. Their approach is both financial and social: they build capital with assets that have high resale value. Certain collectors invest in brands that they know will increase in value over time in order to profit from their resellability. ”

Claire Parham, Ethnologist



**Monika, 32**

**HR systems analyst, Poland**

I appreciate excellence. I'd rather have one cashmere sweater than four synthetic ones. I can't afford couture, but I buy from brands that use noble materials and have good social and ethical policies.



**Jan, 40**

**Health coach, Germany**

I've got a minimalistic attitude towards life in general. I don't follow trends. I buy only what I need. And before I buy, I check to make sure I don't already have something similar in my closet.



**Giulia, 24**

**Student, Italy**

Quality means a lot to me. So much so, that I'm willing to wait until I've saved up enough to buy a beautiful original piece, rather than buying a copy of it on a chain store site.



**Aidan, 19**

**Student/law firm employee, UK**

I studied fast fashion at school and am profoundly disturbed by the impact it has on the environment. That's why I think luxury brands are worth the price. I buy them because they last longer.



**Marco, 56**

**Sales representative, Italy**

There are brands that have a worldwide reputation for great quality, service, warranties. Those are the ones I go to when I need something. I don't look anywhere else - what would be the point?



**Paul, 32**

**Design agency administrator, UK**

I'm a great believer in not fixing what isn't broken. Like the ASUS tablet I bought in 2011 - it's 10 years old, but still works fine. I'd love a new one, but that's the thing about great quality - it lasts almost forever."

# Week 2 Saturday

7:00 -

8:00 - Krakow, Poland  
**Monika, 32, HR systems analyst**  
07:25

9:00 - "I invested in a jacquard blazer from a good site that lets me choose the fabric, pattern, sleeve length and cut, so I get a well-fitted, quality piece. It isn't quite hand-made Chanel, but I love it."

10:00 -

11:00 - Hamburg, Germany  
**Jan, 40, Health coach**  
11:15

12:00 - "My coaching clients notice my trainers. Mine were starting to look a bit shabby round the edges, so I bought a pair of Reebok Nanos. Expensive, but the quality and tech are exceptional."

13:00 -

14:00 -

15:00 - Brescia, Italy  
**Giulia, 24, Student**  
15:10

"I needed a new laptop for school and finally went for a MacBook Air. It's simply the best and even though it stretches my budget, the Apple name, look and warranty are worth it to me."

## Key learnings

- 

These shoppers buy from recognised brands and known labels.
- 

They check the composition and fabric of items and ensure their authenticity.
- 

They prefer new items for longevity or vintage items with high resellability.
- 

They read reviews and check star ratings to be reassured on quality.
- 

They want insurance and warranties, especially for tech and media items.

19:00 - London, UK  
**Aidan, 19, Law firm employee**  
18:35

20:00 - "I bought a cotton sweater from Gant. They're a bio-based business that sells top-quality products and I appreciate their association with the fair-trade Better Cotton Initiative."

23:00 - Rome, Italy  
**Marco B, 56, Sales representative**  
22:50

"Listening to music is my passion. For my new speakers, I went to the masters: Bang and Olufsen. No other manufacturer offers such exquisite sound quality or inspired design."

00:00 - Manchester, UK  
**Paul, 32, Design agency administrator**  
00:10

01:00 - "I've been resisting it for ages, but I'm such a cinephile... I bought a Sony 4K TV! I read all the reviews and know I'm getting the best money can buy - plus it looks smashing in my lounge!"

### Shoppers' aspirations and needs

- Excellent customer service (available 24/7, competent, proactive, accessible via phone and online chats and through app at the touch of a button)
- Assurance their parcels will be well looked after (not lost, handled with care, delivered to door, signature upon reception)
- Tracking and frequent updates to follow their expensive purchases online

# Frugal and responsible



## Ethnographic behaviour analysis

“Frugal and responsible behaviour is characterised by a desire to step back from over-consumerism towards increased simplicity. This behaviour looks beyond “fast fashion” and impulse buying and leans towards a less materialistic way of life, displaying a form of frugality which encourages decluttering. Frugal and responsible consumers are growing more and more interested in the ethical and social behaviours of companies (non-polluting, sustainable, responsible, eco-friendly, contributing to the circular economy...). They believe their vision is geared towards the future. This behaviour can be described as a form of psychological freedom-seeking in which consumers do not feel the urge to buy or need to own the latest trendy products.”

Samuel Guégan, Ethnologist



Susanne, 58

Shipping agent, Germany

After my daughter married, we downsized to a smaller flat. I don't like wasting space – or wasting anything, really. When I buy online, I prefer eco-friendly products, packaging and delivery.



Weronika, 19

Tourism student, Poland

I always prepare a shopping list of things I need before I visit any store, online or off. I rarely visit websites to browse, except to check for discount coupons and promos. I'm trying to live a greener life.



Kate, 32

Artist, Germany

I'm a person who's happy with few possessions. But the things I do own have to be of good quality. I sell everything I no longer want or need. I occasionally make online purchases, but mostly I sell on eBay.



Kiko, 34

Civil servant with national police corps, Spain

I think adverts convince people to buy superfluous things. Since my daughter was born, I've changed my consumption habits, and buy only what I need. I always look for top quality and low prices.



Ilka, 51

Tour guide, Germany

I'm concerned about the impact of e-commerce on society. People sometimes buy cheap things they don't need. I try to choose wisely and eco-consciously. I enjoy buying from local online shops.



Jessica, 34

Customs officer, France

I teach my children that life isn't about buying things. I'm a huge supporter of the circular economy: I buy almost nothing new. I prefer second-hand clothes, books and furniture... I'd rather be hiking than shopping.

# Week 2 Sunday

8:00 -

Hamburg, Germany  
**Susanne, 58, Shipping agent**  
08:05

"I bought tops from a site with an ethical collection; they're made of sustainable cotton from a not-for-profit organisation. I like making eco-friendliness part of my online shopping."

9:00 -

10:00 -

11:00 -

Toruń, Poland  
**Weronika, 19, Tourism student**  
11:00

"I order all my cat's wet food, biscuits, treats and litter on an online shop for home delivery. I buy enough to last for months. Buying in bulk is economical and eco-responsible."

12:00 -

13:00 -

14:00 -

Hamburg, Germany  
**Kate, 32, Artist**  
13:45

"I sold my old trench on a second-hand site today - but only because I found a vintage Burberry in mint condition. A little pricey, but it will last forever. A perfect circular economy transaction!"

15:00 -

18:00 -

Salamanca, Spain  
**Kiko, Civil Servant - National police corps**  
17:55

"My trainers were wrecked, so I looked online for new ones. I found a great pair on a flash sale site (a great price, too!). Apart from essentials, I only buy when I need to replace things."

19:00 -




**Weronika, 19**  
Tourism student, Poland

“ I buy enough to last for months. Buying in bulk is economical and eco-responsible. ”


## Key learnings




They favour good quality, long-lasting products over "fast fashion".




They often prefer buying second-hand rather than new.



They appreciate smaller, sustainable players (i.e., independent websites).



They reject impulse shopping in favour of carefully planned shopping.



These shoppers buy on the basis of need rather than desire.

21:00 -

Hamburg, Germany  
**Ilka, 51, Tour guide**  
21:20

"I found a new local seller on eBay Classified - always a pleasure! She sells hand-dyed wool and as I want to knit a jumper, I ordered some. She offers recycled packaging too - another plus."

22:00 -

23:00 -

Anecy, France  
**Jessica, 34, Customs officer**  
23:45

"I placed an order with an organic grocery store for delivery tomorrow. They don't have physical stores, so I save a lot when I buy from them. Online shopping occasionally has its uses."

00:00 -

## Shoppers' aspirations and needs



- Favouring brands with strong corporate values
- Preferring companies that promote sustainability, eco-solutions, fair trade business ethic
- Availability of second-hand purchase options
- Eco-friendly packaging: no single-use plastics, trays, bubble wrap
- Slower, cheaper shipping options
- Grouped deliveries at end of month
- Low-carbon shipping options
- Ships favoured over planes for imported goods

# Conclusion

This study reveals 14 key behaviours grouped around two core trends: the consumerist mentality of “Always More” and the responsible mindset of “Even Less”. They were defined by analysing and cross-referencing attitudes, habits and values, and by comparing and contrasting individual relationships to consumption and trade across Europe. Nevertheless, within these 14 reference behaviours, there are also countless sub-categories of consumer aspirations and expectations.

One of the most important lessons learned from this ethnographic study is that there are infinite ways of behaving. A single individual may display a contradictory mix of “Always More” and “Even Less” behaviours depending on factors as varied as context, product, service category, or even time of day.

By multiplying consumer journeys and challenging or even changing established models and practices, consumers themselves are now defining the contours of a thriving New Commerce. This study has not only identified the individual behaviours of this New Commerce, but also its transversal foundations.

Heightened awareness of the value and impact of purchasing is one of these foundations as seen in the demand for traceability and proximity in **local over distant** and the delay before purchase in **slow retail**.

It also appears among customers who seek recognition and loyalty rewards in the form of discounts in **FOMO (Fear Of Missing Out)** or personalised experiences in **fluid journey**. Whether committed and thoughtful or driven and compulsive, buying is no longer a simple transaction but a relationship that merits empathy and recognition (service, commitment, discount) from brands and retailers.

This reassessment of the purchasing act has resulted in fierce competition between merchants, as customers treat every purchase as a personal “micro-call for tender” designed to fulfil their unique mix of criteria. The importance of meeting customer expectations for service, commitment, usefulness and added value today is critical. Because in the digital age, comparison is king. Comparison of promotions in **FOMO**, of the convenience-price ratio in **brand agnosticism**, of offline and online in **phygital ubiquity**, of new and used in **second-hand and circular economy**. Comparison of delivery and return conditions in **fluid journey** and **home as a new marketplace**. But also, comparison of the ethics and engagement of manufacturers and retailers in **frugal and responsible**. And finally, an almost universal comparison of opinions and reviews of products and related services offered by brands and retailers, in concentric circles that range from communities of enthusiasts, to experts, to the anonymous.

This importance of peer opinions, whether expressed through reviews, stars, online comments, content or the advice of salespersons or customers in shops, cannot be underestimated. This need for physical contact or social network activity, or for sharing feedback, is far from insignificant. It crosses all the behavioural divides within “Always More” and “Even Less”. It puts the human element back at the heart of consumption, even among those who are advocates of **dehumanised purchasing**.

The human element is at the centre of the debate between the individual and the collective, between personal comfort and the common good, between uninhibited satisfaction and social and environmental responsibility. It is where the positive tension between **FOMO** and **slow retail**, between **local over distant** and **home as a new marketplace**, and between **retail-tainment** and **frugal and responsible**, plays out.

Most of today’s consumers have found a balance between these two extremes. It is on this balance that the New Commerce is built: a model that can serve group living and collective approaches yet cater to individual, personalised needs.

A model that incorporates emerging technologies and contributes to the positive transformation of towns and cities through environmentally responsible human-centered design. A model that combines the human face of local ecosystems with the streamlined efficiency of digital commerce for greater peace of mind.

By meeting all the conditions for a virtuous transformation, the New Commerce opens up a world of possibilities. It incites innovation among existing players and brings new players to the stage. It compels companies to rethink the way they do business and provides the opportunity to effect positive, sustainable change.





Six ethnologists followed the buying behaviour of 72 Europeans from six countries over several weeks.

Over 150 hours of online interviews, thousands of messages, photos and videos shared, hundreds of purchases documented and explained, all contributed to building a detailed picture of Europeans' attitudes to consumption, their motivations, habits and expectations.

Presented in a novel and exclusive format, as a collective diary over two weeks, **New Commerce: Always More and Even Less** presents the results of that extraordinary immersion.

It highlights two fundamental trends supported by 14 underlying behaviours, decoded and illustrated in a hundred quotes, to shedding light on an emerging reality: New Commerce.



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