



What matters to today's Dutch consumer

2025 consumer behavior tracker for the
consumer product and retail industries in the

Table of contents





Executive summary

Technological innovation, shifting financial priorities, and increasing awareness of sustainability are driving the evolution of consumer preferences and purchasing behaviors. This report identifies key trends shaping the consumer landscape

Consumer clusters: A new way to categorize buyer behaviors

We identified five distinct behavior clusters based on the sub-themes on which questions were asked in the consumer survey. Each cluster presents unique opportunities for targeted marketing strategies, reflecting each group's distinct lifestyle and priorities. The Gen Z consumers are present in three different clusters and exhibit different behaviors.

Paths to discovery: The way consumers find products is changing

Gen AI gains traction with the consumer

Generative AI (Gen AI) is transforming shopping experiences, with nearly one in four consumers using generative AI to shop and 68% of consumers prepared to act on its recommendations. The preferences of younger cohorts, particularly Gen Z and millennials, for hyper-personalization and seamless digital experiences are driving this trend.

- Nearly 60% of consumers have already replaced traditional search engines by Gen AI tools for product recommendations
- More than 50% of consumers use visual and voice input for product searches and purchases.
- Increased Gen AI usage is not meeting needs as consumer satisfaction has reduced.

Personal and planetary well-being: How sustainability and eating habits influence consumer choices

Sustainability is a critical factor in purchasing decisions for 64% of consumers overall. Initiatives such as carbon labeling and food-waste reduction resonate strongly.

- The proportion of consumers who paid a 1-5% premium for sustainable products in 2024 increased from 30% to 38%.
- 71% of consumers are aware of the contribution of food waste to environmental issues.

Executive summary

Social commerce is the retailer's route to Gen Z

Platforms such as Instagram and TikTok are reshaping retail, with 60% of Gen Z purchasing new products through social media.

- The share of consumers purchasing new products or brands through social media increased from 13% in late 2023 to 31% in late 2024.
- 25% of consumers say they frequently use social media for customer service.
- 66% of Gen Z consumers have discovered a new product/brand on social media.

Retail media networks: Capturing the shopper's attention

Retailers are channeling investment operations. Advertisements on retailers' apps and websites garner the highest attention across all channels.

- 74% of consumers notice ads on retailer websites or apps when they search for a product, compared with 67% on social media.

- Online adverts, while shopping, influenced nearly one-third of online purchases.

How are people shopping?

Make it snappy: The growing demand for quick commerce

Quick commerce, supported by advanced logistics and AI, is set to dominate, with consumers willing to pay for speed.

- Consumer preference for quick delivery has surged significantly over the past two years. The share of consumers citing 2-hour delivery as an important service attribute when they shop jumped from 34% in 2022 to 64% in 2024.
- Overall, consumers were willing to pay 9% of the order value for 2-hour delivery in 2024, up from just 5% the previous year.

Executive summary

Seeing the light: The beginning of the end of the cost-of-living crisis?

Although the cost-of-living crisis continues to impact consumer sentiment, things are slowly improving. However, consumers still seek discounts, both online and in-store. Private-label sales are on the rise as consumers look for more affordable options.

- 64% of shoppers visit multiple physical stores looking for deals, up from 56% last year.
- Currently, 65% of consumers buy private-label or low-cost brands, up from 63% last year.
- 73% of millennials expect retailers to provide alerts when brands reduce the weight of a product without reducing the price ('shrinkflation').

The grass is greener: Why consumers are switching brands

- 70% of consumers globally switch to try new brands. Another major reason for switching brands, as stated by 65% of consumers, was that membership programs and shared preference data failed to result in a better experience.
- Two-thirds of consumers will switch food brands for higher nutrition scores.

To remain competitive, brands and retailers must augment Gen AI tools to become more consumer-centric, use technology to boost resilience and sustainability and lower prices, leverage social and retail media networks as a keyway to engage and influence early in the consumer journey, and bridge the gap in consumer education and trust with transparent collaboration across all partners.

Who should read this report and why?

This report will be particularly helpful to chief executive officers, chief marketing officers, chief information officers, chief technology officers, chief sustainability officers, and chief data officers from the consumer product and retail sector, and to those involved with =AI and Gen AI, innovation and analytics, consumer experience, supply chain, and social commerce.

This report is the fourth in our annual research series that examines evolving consumer behaviors. It is based on:

- **Findings from a comprehensive survey of 1,000 consumers in the Netherlands**, as part of a global survey across 12 countries (the Netherlands, Australia, Canada, France, Germany, India, Italy, Japan, Spain, Sweden, the UK, and the US).
- **Cluster analysis** of the 12,000 global consumers to understand the key demographic and behavior characteristics of the clusters. We used the K-means (K = number of clusters) algorithm, an unsupervised

learning technique, to group consumers and identified five distinct behavior clusters based on the sub-themes on which questions were asked in the global consumer survey.

To learn more about the cluster analysis, please refer to the cluster analysis description.

01 | Consumer clusters: A new way to categorize buyer behaviors

We identified five distinct behavior clusters based on the sub-themes on which questions were asked in the consumer survey:








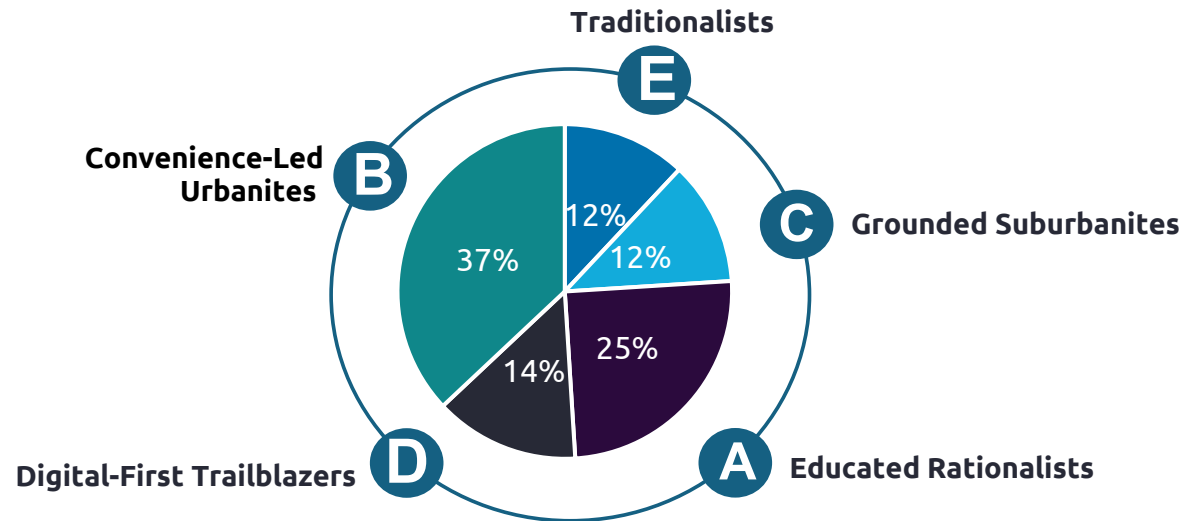
	Usage of Gen AI
	Social media influence
	Sustainability impact
	Online advertisements
	Cost of living
	Loyalty
	(Last-mile) convenience

Figure 1.

Consumer trends clusters



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 12,000 consumers; Educated Rationalists cluster = 2,462 consumers; Convenience-Led Urbanites cluster = 3,556 consumers; Grounded Suburbanites cluster = 1,912 consumers; Digital-First Trailblazers cluster = 2,660 consumers; Traditionalists cluster = 1,410 consumers.

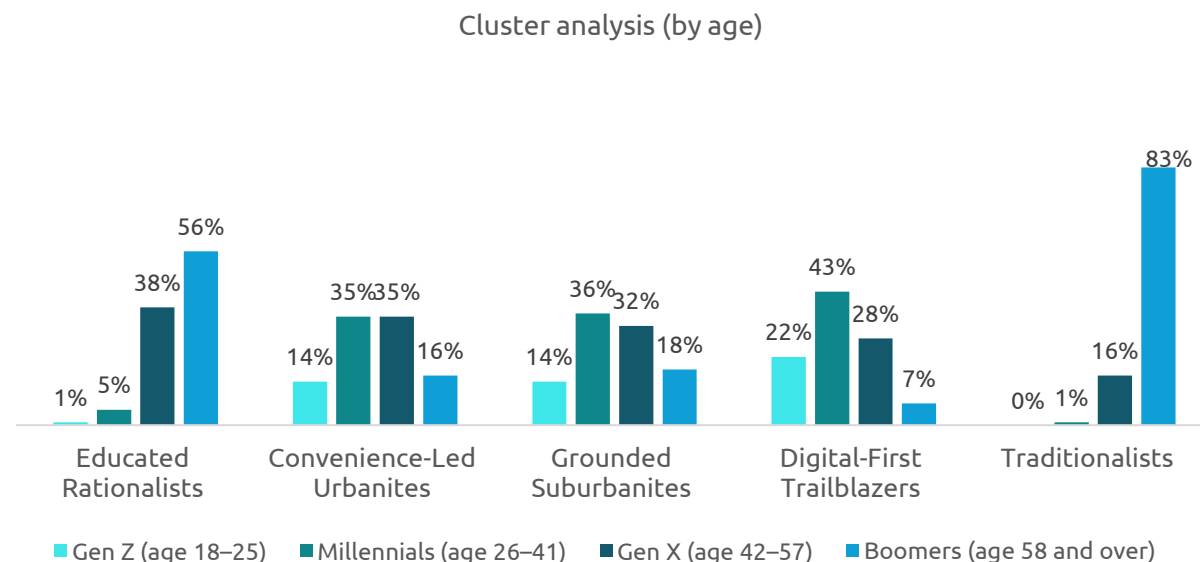
Gen Z consumers are present in three different clusters and exhibit different behaviors (Figure 2). The purpose of clustering is to divide a set of data points into broadly homogeneous groups.

Each cluster presents unique opportunities for targeted marketing strategies, reflecting each group's distinct lifestyle and priorities. We created a cluster analysis and used the K-means algorithm (K = number of clusters). This is an unsupervised learning technique to group data points. The algorithm operates as follows:

- Randomly initialize K points, referred to as means or cluster 'centroids'.
- Categorize each item to its nearest mean and update the mean's coordinates, which are the averages of the items categorized in that cluster.
- Repeat the process for a specified number of iterations to obtain the finalized clusters.

Figure 2.

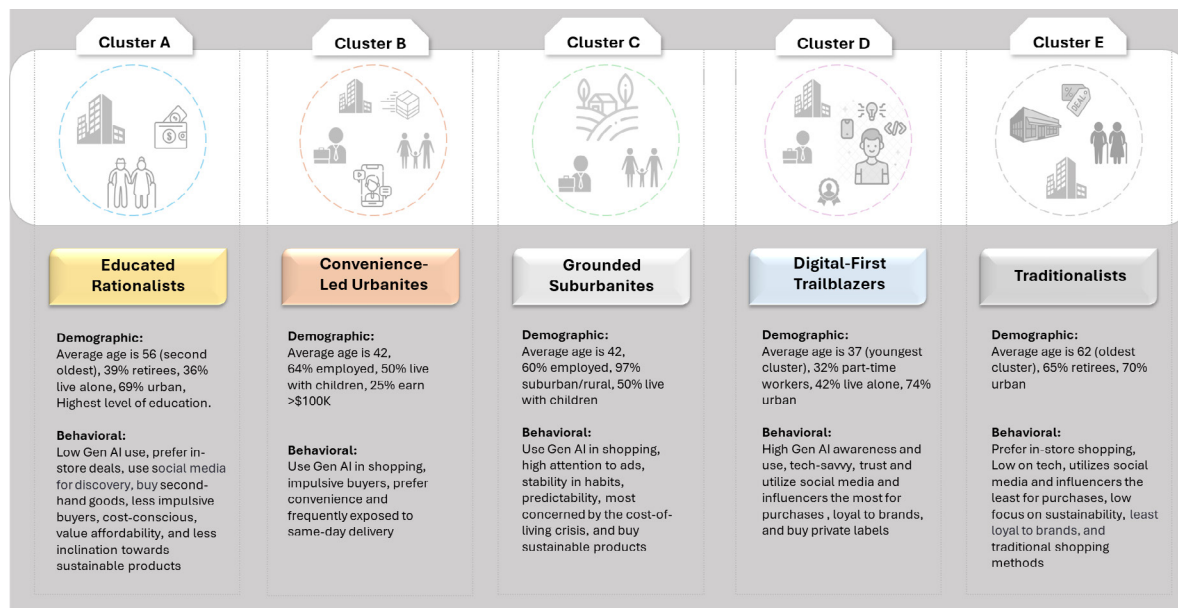
Cluster segmentation by age groups



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers.

Figure 3.

Cluster segmentation by demography and behavioral attributes



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers; Educated Rationalists cluster = 253 consumers; Convenience-Led Urbanites cluster = 371 consumers; Grounded Suburbanites cluster = 117 consumers; Digital-First Trailblazers cluster = 139 consumers; Traditionalists cluster = 120 consumers.



02

Paths to discovery: The way consumers find products is changing

Gen AI gains traction with the consumer

Over a quarter of consumers in the Netherlands have used Gen AI in shopping

Gen AI is driving innovation in both online and in-store experiences. AI (including Gen AI) in the retail market will have a global market value of around \$85 billion by 2032.¹ Yael Cosset, CIO and SVP, Kroger, says: "I believe Gen AI is already impacting and will continue to impact the grocery industry broadly and in a transformational way. We continue to use AI and Gen AI across the business for improvements such as more relevant creative marketing content, better search outcomes on digital platforms, greater personalization for customers, easier solutions for our associates, and many more areas. Like all technology, we view AI as a resource for our customers and associates to improve our human

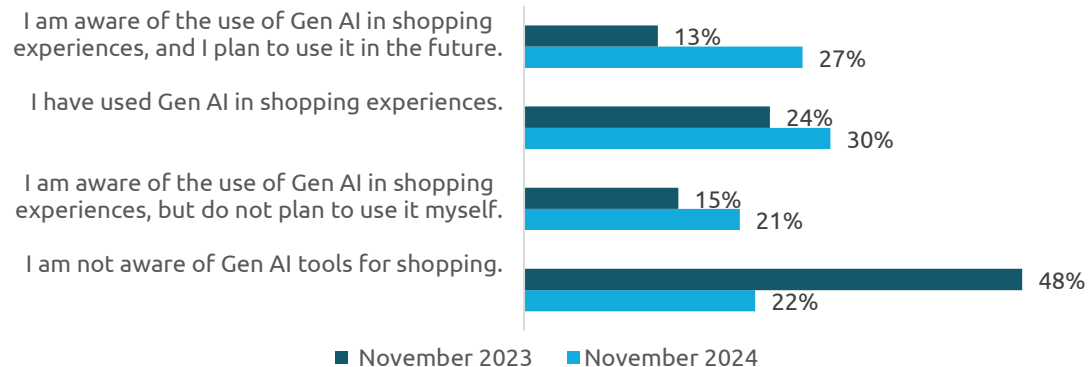
connections, not replace them."²

Around one-quarter (27%) of consumers used Gen AI in shopping experiences in 2024, which is significantly higher than the 13% the previous year. This figure is higher, at 47%, for Gen Z (age 18–25), 47% for millennials (age 26–41), 23% for Gen X (age 42–57) and 8% for boomers (age 58 and over). Younger consumers, particularly Gen Z and millennials, use Gen AI in shopping, indicating a shift toward tech-savvy

Figure 4.

One-quarter of consumers have used Gen AI in shopping

Share of consumers who agree with the statements below:



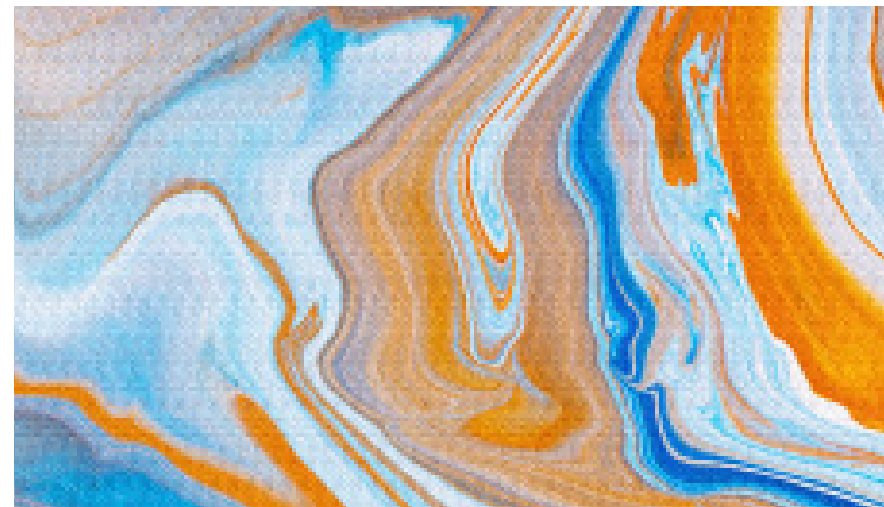
Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers, Capgemini Research Institute, What matters to today's consumer, January 2024.

¹ Forbes, "Leveraging Gen AI's competitive advantage," August 2024.

² PRNewswire, "Kroger CIO discusses digital innovation trends for grocery retail in 2024," January 2024.

51%

of Digital-First Trailblazers cluster have used Gen AI in shopping experiences



The Digital-First Trailblazers cluster is by far the most likely to use Gen AI in shopping experiences, at 51%, with other clusters ranging from 5% to 22%. We note that 74% of this cluster lives in urban areas and has the lowest average age across all clusters at 37. This cluster has reshaped its shopping behaviors in response to the cost-of-living crisis and searches extensively for discounts online and in-store (figure 5).Figure 5

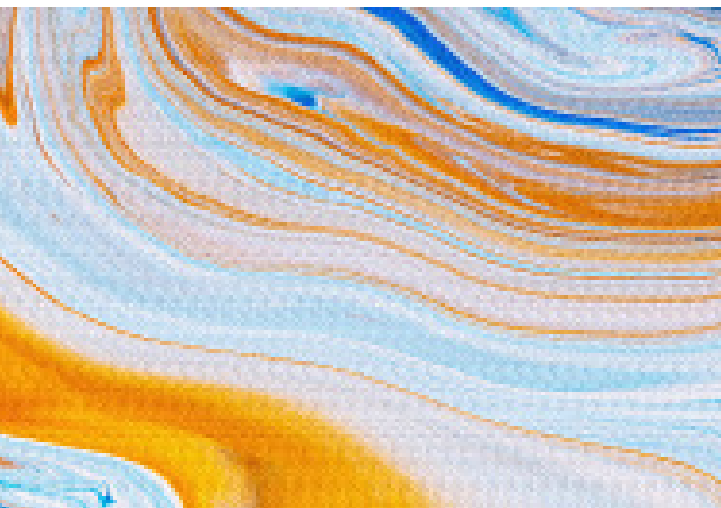
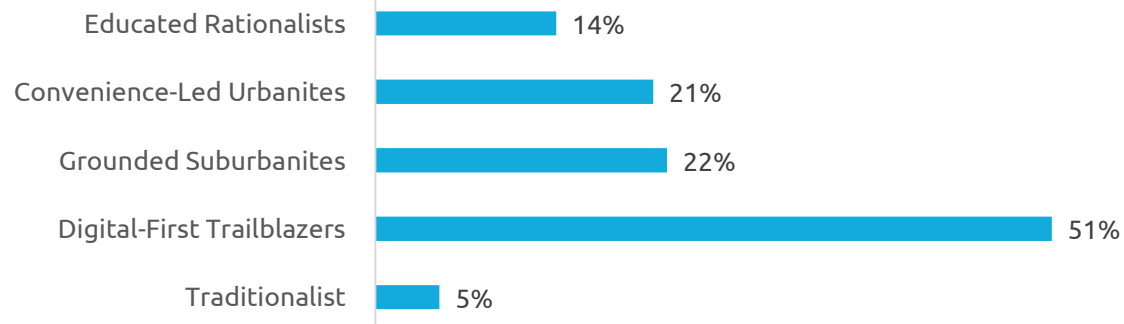


Figure 5.

Just over half of Digital First Trailblazers have used Gen AI in online shopping

Consumers who have used Gen AI in shopping experiences



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 12,000; N = 2,909 consumers who are aware of the use of Gen AI in shopping experiences and have used it already; Educated Rationalists cluster = 336 consumers; Convenience-Led Urbanites cluster = 745 consumers; Grounded Suburbanites cluster = 412 consumers; Digital-First Trailblazers cluster = 1,348 consumers; Traditionalists cluster = 68 consumers.

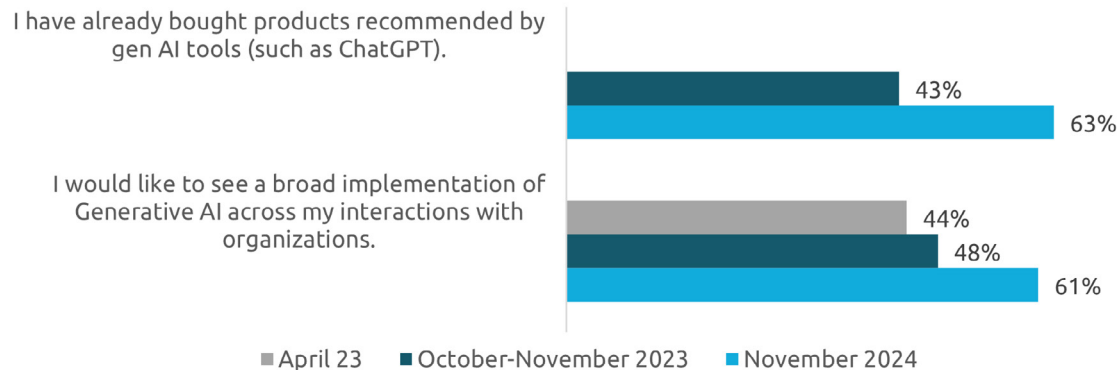
Some 65% of consumers are open to Gen AI shopping recommendations

As consumer trust in Gen AI grows, they expect to see its influence in their shopping experiences. In a notable response, Omoda has introduced a Gen AI tool called 'Omoda Stylist', which allows customers to explore outfits based on specific themes, occasions, or personal preferences.

An impressive 61% of consumers would like to see Gen AI integrated into their shopping interactions. We also see that 63% bought products recommended by Gen AI in 2024, compared with 43% the previous year (figure 6).

Figure 6.

63% of consumers have purchased based on Gen AI recommendations



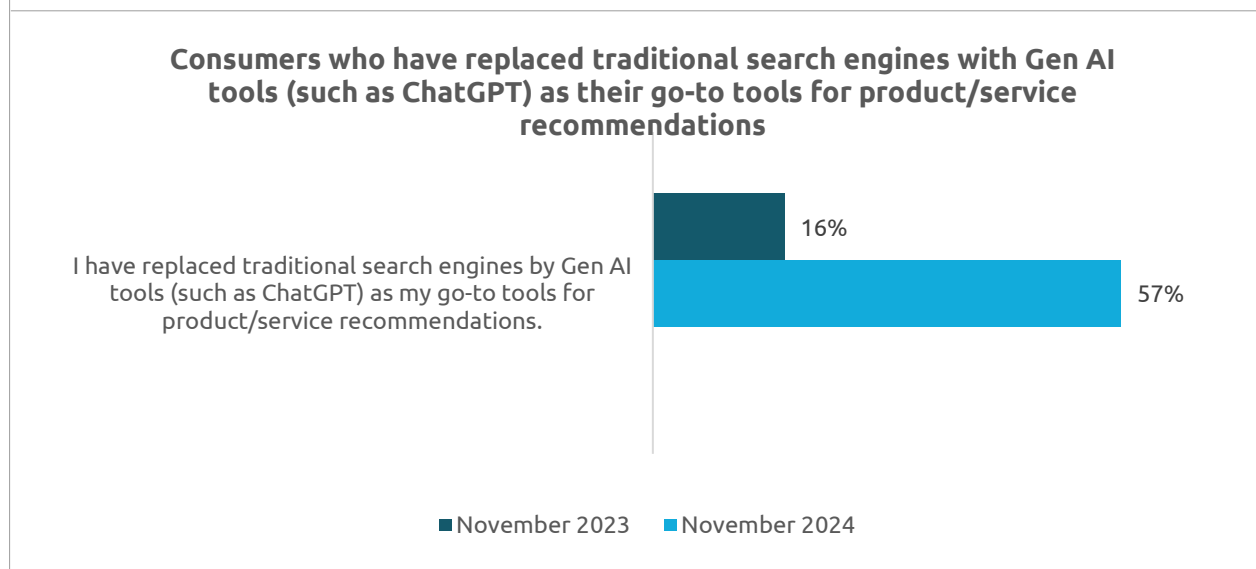
Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 12,000, N = 2,909 consumers who have used Gen AI in shopping experiences, Capgemini Research Institute, What matters to today's consumer, January 2024.

Nearly 60% of consumers have already replaced traditional search engines with Gen AI tools for product recommendations

More than one third (36%) of consumers say they are enthusiastic about the impact of Gen AI on their online shopping, while 57% say they have replaced search engines with Gen AI tools for product recommendations, compared to 16% in 2023. Moreover, 60% of consumers want Gen AI tools to aggregate search results from online search engines, social media platforms, and retailers' websites to provide a one-stop-shop for highlighted purchase options.

Figure 7.

57% of consumers have replaced traditional search engines with Gen AI

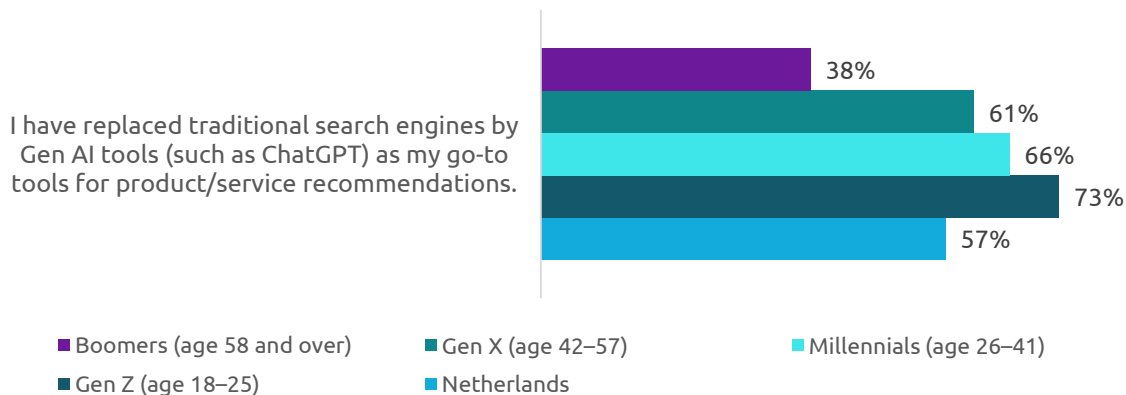


Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers, Capgemini Research Institute, What matters to today's consumer, January 2024.

Figure 8.

57% of consumers have replaced traditional search engines with Gen AI tools

Consumers who have replaced traditional search engines with Gen AI tools (such as ChatGPT) as their go-to tools for product/service recommendations



Gen Z (49%) and millennials (46%) want automated, personalized, real-time Gen AI customer support, as do 34% of consumers overall. The desire for chatbots with features such as ChatGPT is high across all age groups, with 72% of Gen Z and 68% of millennials expressing interest. Overall, 62% of consumers want responses from AI chatbots, highlighting the growing consumer acceptance of advanced conversational AI in customer service (figure 6).

Even though there is no AI-driven automated replenishment service available in the Netherlands, consumers show a strong interest in it, with 62% of both Gen Z and Millennials supporting this feature. Overall, 56% of consumers suggest that automated reordering systems could significantly boost convenience. For example, in the United States there is Walmart's AI-driven "InHome Replenishment". This system leverages AI to analyze shopping habits, ensuring essential items are automatically restocked, enhancing customer convenience and inventory management.³

A notable 59% of Gen Z and 65% of millennials want hyper-personalized content and product recommendations. Overall, 55% of consumers are interested in this feature.

Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers

³TechCrunch, "Walmart debuts generative AI search and AI replenishment features at CES", January 2024.

Figure 9.

Consumer preference for Gen AI across different stages of shopping



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers who are aware of the use of Gen AI in shopping experiences and have used it already.



Increased Gen AI usage is not meeting needs as consumer satisfaction has reduced

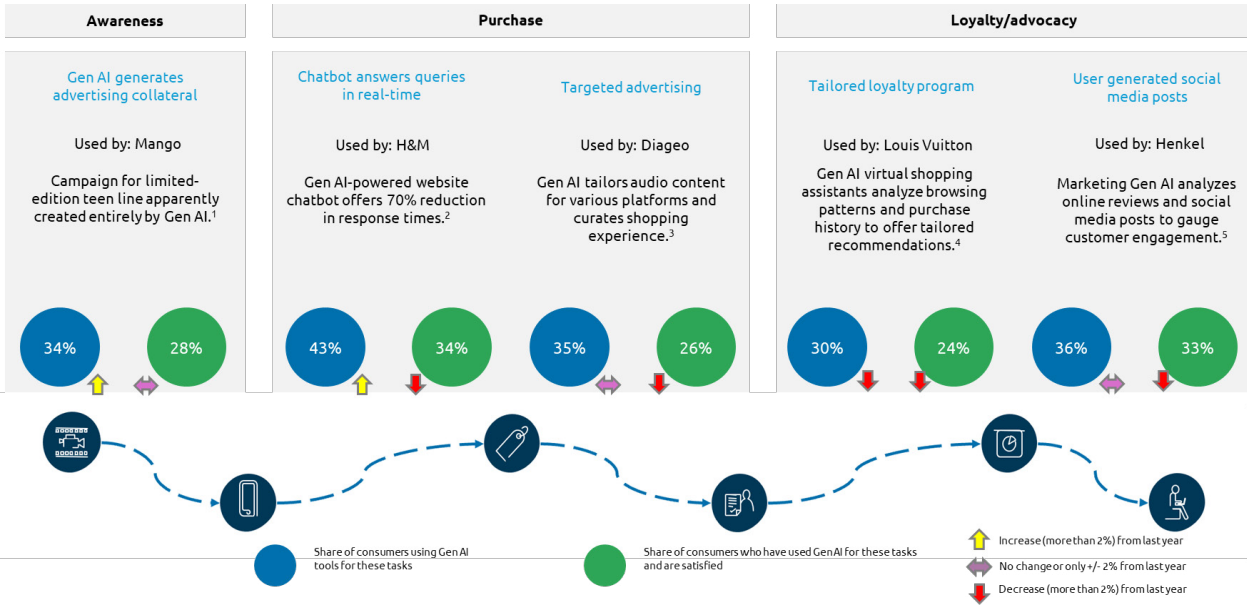
Consumers are rapidly accepting Gen AI as an integral part of the shopping experience, with 47% currently using chatbots for their customer queries. Albert Heijn has introduced 'Mijn AH Assistent', a generative AI-powered chatbot integrated into the 'Mijn AH' app. This assistant helps customers with daily shopping by providing recipe inspiration, product suggestions, and practical cooking and storage tips.

However, overall satisfaction with Gen AI is moderate to low and has fallen in various areas compared to the previous year (figure 10). For example, in tailored loyalty programs, satisfaction has globally dropped from 37% to 30%, with

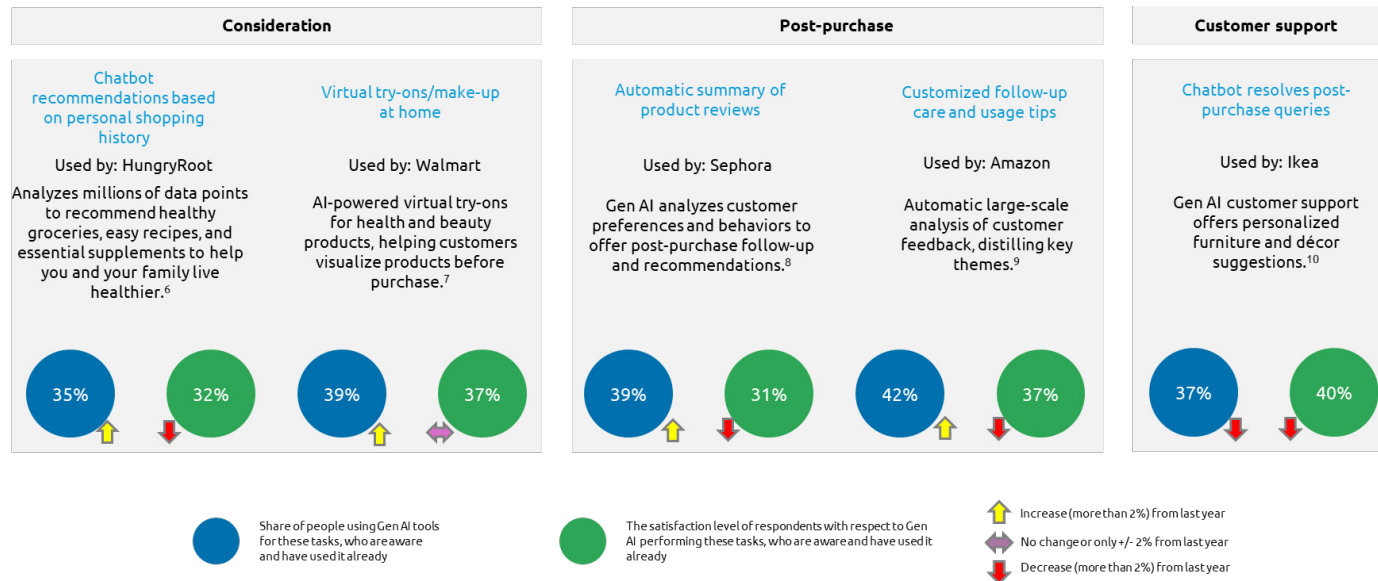
Millennials (24%) particularly disillusioned. The highest satisfaction level is reported for automated support responses (40%) and post-purchase and personalized follow-ups (37%). The areas where satisfaction levels have fallen are highlighted in the chart below.

Figure 10.

Satisfaction with Gen AI across shopping journey is at 37% from 41% previous year



Continue on the next page...



Sources:

1. Mango Fashion Group, "Technological advance and the commitment to digital transformation are part of the Earn lever of Mango's Strategic Plan 2024-2026," July 2024.
2. PRNewswire, "Hungryroot launches SmartCart™, a new AI tool to help people live healthily," September 2024.
3. Venturebeat, "The techniques include virtual try-on of outfits, virtual showroom experiences and digital twins," July 2024.
4. Infinitive, "Reimagining customer service through Gen AI," January 2024.
5. Adweek, "How brands like Diageo, Progressive and eBay are using Gen AI to tailor ads," May 2024.
6. Renascence, "Personalized product recommendations using AI," September 2024.

7. Amazon, "Analyzing these reviews to extract actionable insights enables data-driven decisions that can enhance customer experience and reduce churn," August 2024.
8. TechBSB, "Louis Vuitton embraces artificial intelligence," March 2024.
9. Consumer Goods, "Henkel will pilot Gen AI solutions trained on its own assets to create personalized marketing content at scale that's both brand- and commercial-safe," April 2024.
10. Forbes, "IKEA has unveiled a new Gen AI chatbot powered by ChatGPT, with the aim of giving every customer their own AI design assistant," May 2024.

Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 2,909 consumers who are aware of the use of Gen AI in shopping experiences and have used it already.

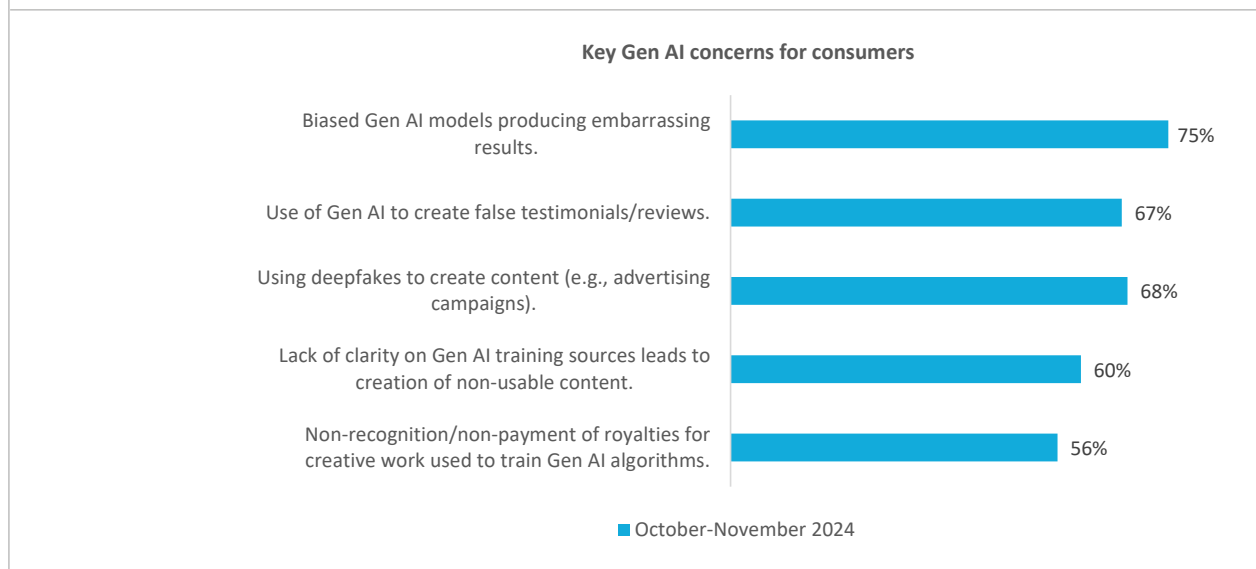
High consumer awareness of Gen AI challenges

Consumer consciousness of multiple challenges around Gen AI is on the rise, with 6 out of 10 consumers aware of them in October-November 2024. Consumers in the Digital-First Trailblazers cluster, who are the heaviest Gen AI users, are also the most concerned about the tech.

- **Bias in AI models:** Concerns about bias leading to unrepresentative results are at 75%. This underscores the critical need for ongoing scrutiny and improvement in AI training processes.
- **Impersonation and misinformation:** Worry about the impersonation of individuals to create misleading testimonials is at 67%, indicating Gen AI's potential to spread misinformation and manipulate public perception.
- **Deepfake concerns persist:** Concerns about the use of deepfakes remain high, with 68% of consumers expressing ongoing worries about privacy and consent in the digital age.

Figure 11.

Consumers have high technology consciousness leading to more Gen AI-related concerns



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000,

Gen AI visual search and voice commerce is evolving

AI search startup Perplexity has rolled out a new feature in which users can research products via conversational prompts and image inputs, checkout with one click, and even get free shipping on purchases.⁴ Cosmetics giant Estée Lauder has released its Voice-Enabled Makeup Assistant (VMA), which harnesses AI and augmented reality (AR) to help visually impaired people use cosmetics.⁵ After assessing uniformity and coverage, the app provides audio feedback on the application of lipstick, eyeshadow, and foundation. Future versions will offer a wider range of makeup looks and enhanced educational tools.⁶ Additionally, the company collaborated with Microsoft on an innovation lab that will help it explore Gen AI applications across more than 20 brands.⁷

Figure 12.

More than 50% of consumers use visual and voice search.



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers.

By understanding visual content, Gen AI enhances product recommendations and enables visual search features. Amazon Lens can discover exact and similar matches in the Amazon Shopping app using uploaded images, photos, or barcodes.¹⁰

By understanding visual content, Gen AI enhances product recommendations and enables visual search features. Amazon Lens can discover exact and similar matches in the Amazon Shopping app using uploaded images, photos, or barcodes.


- Most consumers across all age groups occasionally use visual search (81%), with Gen X at 83%. Voice search is also widely used on an occasional basis (66% of all respondents).
- Groceries and food supplies lead in both visual search (59%) and voice search (56%), highlighting everyday convenience.
- Health and beauty products show strong engagement, with 38% of consumers using visual search and 46% using voice search.

⁴ ZDNET, "Perplexity launches an AI-powered shopping assistant - and it even gets you free shipping", November 2024

⁵ CIO, "The cosmetics giant has released its Voice-enabled Makeup Assistant, which leverages artificial intelligence," September 2023.

⁶ Mission, "AI beauty revolution: Estée Lauder's tech makeover," July 2024.

⁷ FFG, "Estée Lauder CIO wants to bring AI to the forefront of beauty," April 2024.

An abstract graphic on the left side of the slide featuring a series of overlapping, wavy, horizontal lines in various colors including red, orange, yellow, green, blue, and purple, creating a sense of movement and depth.

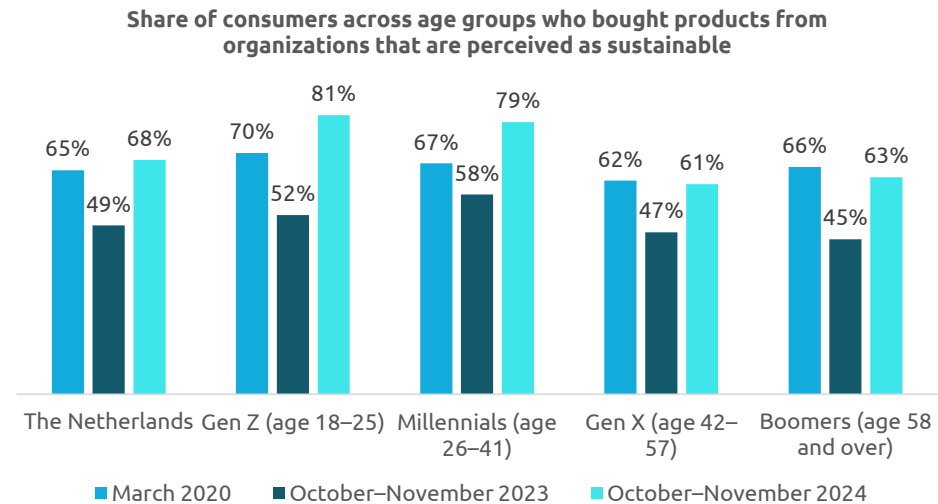
Personal and planetary well-being: How sustainability and eating habits influence consumer choices

The demand for sustainable choices is large, with Gen Z leading the way in sustainable choices

The demand for sustainable products is reshaping the purchasing and consumption behavior of Dutch consumers, particularly among younger generations. In the Netherlands, 68% of consumers reported purchasing products from organizations perceived as sustainable, with this figure rising to 81% for Gen Z and 79% for Millennials. This shift underscores a growing preference for brands that prioritize transparent sustainability practices and eco-friendly initiatives, such as Albert Heijn and Bol, both of which have achieved the prestigious B-Corp certification. Furthermore, companies like Vinted, Bever, and HEMA have gained significant traction through circular fashion and recycling initiatives, demonstrating the power of

Figure 13.

Gen Z continues to lead in the purchase of sustainable products



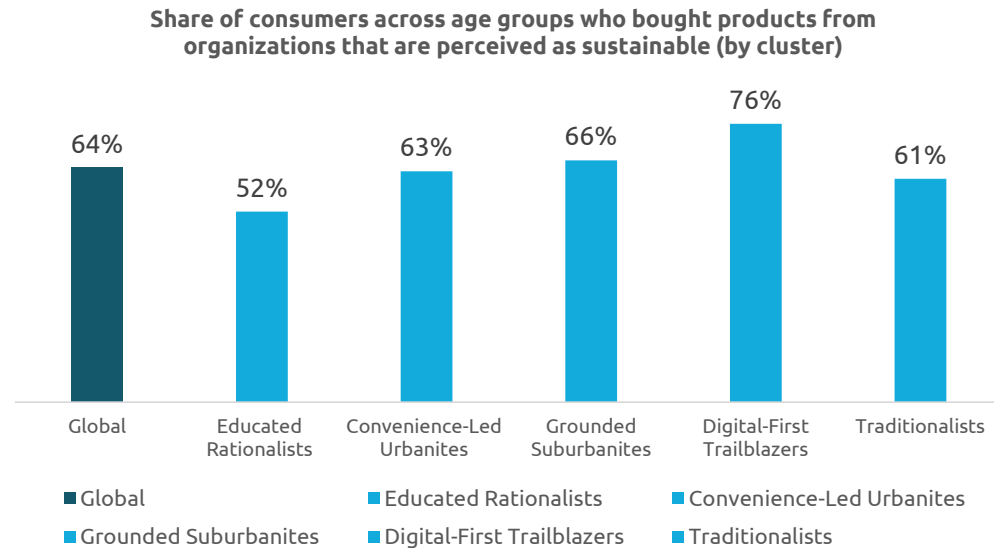
Source: Capgemini Research Institute, Sustainability in Consumer Products and Retail survey, March 2020, N = 4,779 consumers who have paid more for a sustainable product. Capgemini Research Institute, Consumer demand survey, October–November 2023, N = 4,307 consumers who have paid more for a sustainable product.

Consumers in the Digital-First Trailblazers cluster purchase the most sustainable products. The Educated Rationalists cluster, with 69% living in urban areas and 39% being retirees, make the fewest sustainable purchases.



Figure 14.

Digital-First Trailblazers purchase more sustainable products than other clusters



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers; Educated Rationalists cluster = 253 consumers; Convenience-Led Urbanites cluster = 371 consumers; Grounded Suburbanites cluster = 117 consumers; Digital-First Trailblazers cluster = 139 consumers; Traditionalists cluster = 120 consumers.

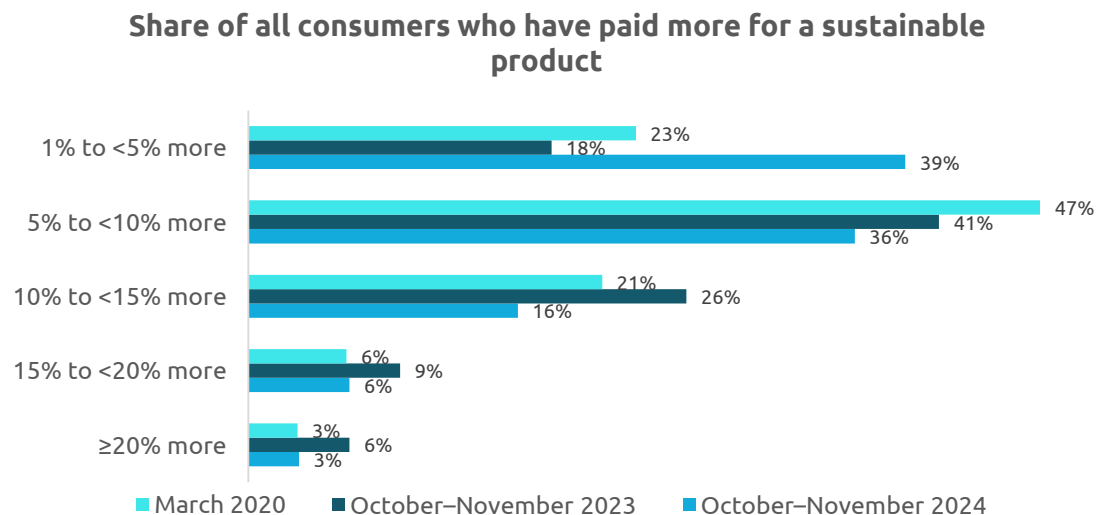
Consumers are willing to pay more for sustainable products, but favor lower premiums

Sustainable purchasing is becoming mainstream, but consumers are attracted toward affordable eco-friendly options. In 2024, 39% of Dutch consumers reported paying 1 to 5% more for sustainable products, marking a significant increase from the 23% in 2020 and 18% in 2023. However, willingness to pay higher premiums (10% or more) has steadily declined, reflecting a growing demand for affordability alongside sustainability (figure 15).

This shift could be partly driven by brands offering affordable sustainable solutions. For instance, Albert Heijn provides its Premium customers with discounts on their bio and Terra products, while initiatives like Rituals' refillable product options are also becoming increasingly popular. The rise of these affordable sustainable alternatives demonstrates how

Figure 15.

Consumers who paid more for sustainable products have shifted toward the lower premium range



Source: Capgemini Research Institute, Sustainability in Consumer Products and Retail survey, March 2020, N = 4,779 consumers who have paid more for a sustainable product. Capgemini Research Institute, Consumer Demand survey, October–November 2023, N = 4,307 consumers who have paid more for a sustainable product, Consumer Demand survey, October–November 2024, N = 4,549 consumers who have paid more for a sustainable product.

Consumers strongly support food-waste reduction initiatives

Awareness of food waste as a critical environmental issue is rising rapidly among Dutch consumers. In 2024, 79% recognized the environmental impact of food waste, compared to 68% in 2023. Support for retailer-led initiatives to tackle food waste has also grown, with 80% of consumers backing these efforts, up from 69% a year earlier. Furthermore, 67% now actively support brands that demonstrate transparency in food waste reduction practices, up from 50% a year earlier. This highlights the importance of taking responsibility in this area (figure 16).

Dutch retailers are responding with innovative strategies. Albert Heijn has implemented dynamic pricing for products nearing their expiration date, while partnerships with organizations like Too Good To Go enable retailers and restaurants to sell surplus food at discounted rates. These efforts align with consumer demand for taking responsibility for diminishing food waste and underscores the significant role of retailers and brands in this matter.

Figure 16.

Consumers continue to support food waste initiatives



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers, Capgemini Research Institute, What matters to today's consumer, January 2024.

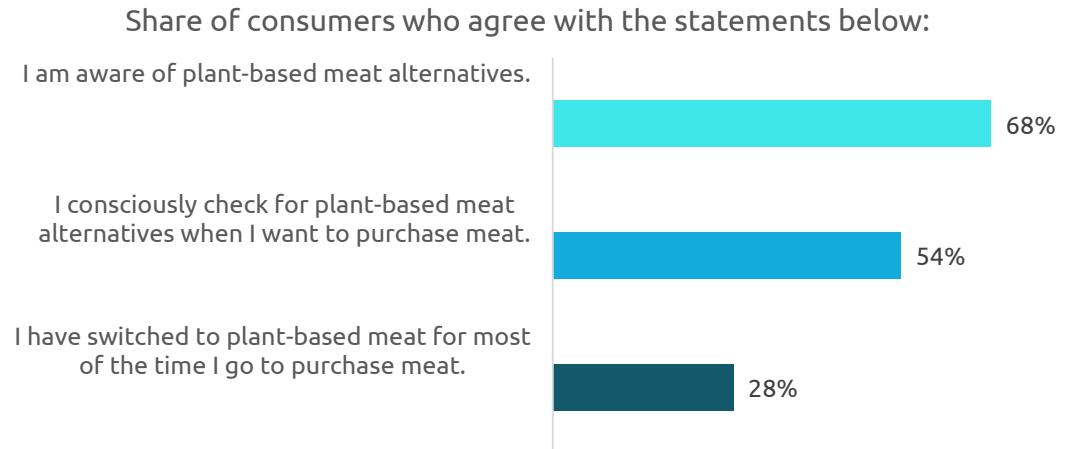
One-quarter of millennials have switched to buying plant-based meat most of the time

As meat consumption falls, retailers are promoting plant-based meat alternatives

The adoption of plant-based meat alternatives is accelerating in the Netherlands, outpacing global trends. In 2024, 68% of Dutch consumers were aware of plant-based meat alternatives, compared to 56% globally. Moreover, 54% actively look for plant-based options when shopping for meat, and 28% now purchase plant-based alternatives most of the time, exceeding the global average of 18%.

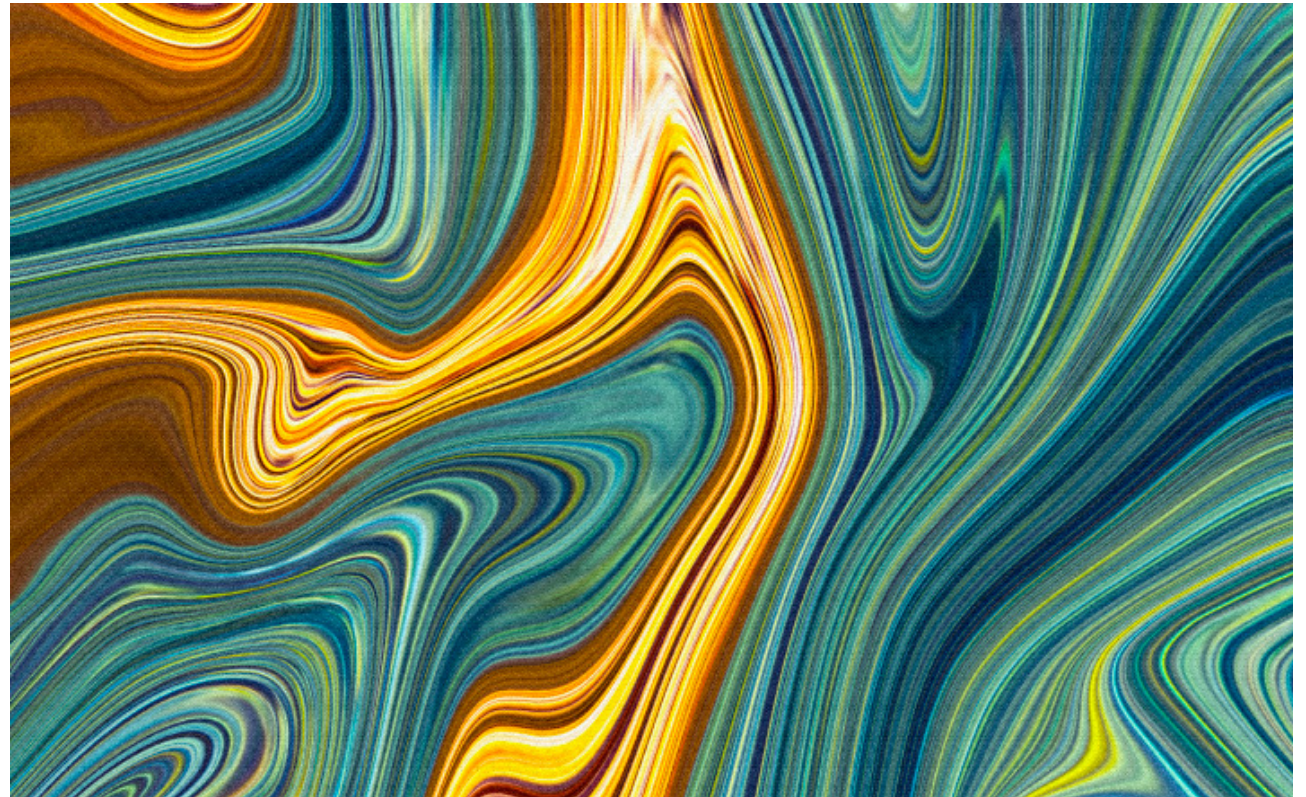
Figure 17.

Approximately one in four consumers have shifted to plant-based meat alternatives most of the time



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers.

This trend is supported by Dutch brands such as Beyond Meat and De Vegetarische Slager, which have developed innovative, appealing products that cater to both taste and sustainability. Supermarkets are also playing a pivotal role: Albert Heijn introduced its Terra plant-based private label, Lidl has integrated meat substitutes into the meat section, and Jumbo has discontinued price promotions on meat. These developments highlight the Netherlands' leadership in the plant-based movement and present an opportunity for brands to innovate and scale solutions to meet growing consumer demand.



Social commerce is the retailer's route to Gen Z

Social media continues to shape consumer shopping behavior

Social commerce, driven by Gen Z, is reshaping retail. Social networks' innovative shopping features have revolutionized interactive product discovery and purchasing, with interesting parallel shifts toward convenience and community. Platforms such as Instagram and TikTok are using this revamped shopping experience to reach a new generation of consumers.

The share of consumers purchasing new products or brands through social media increased from 8% in late 2023 to 16% in late 2024, underscoring its effectiveness as a marketing channel, in particular for the young.

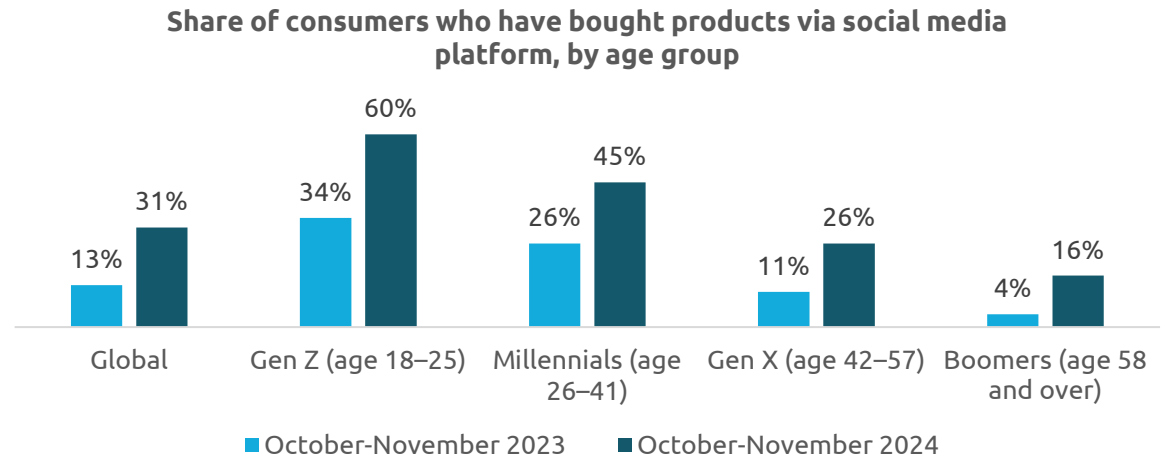
- Gen Z leads the way, with 60% buying new products through social media in 2024, up from 34% the previous year.
- Millennials also show a notable increase, with 45% purchasing new brands via social media, up from 26%.
- While Gen X and boomers are also increasing their purchase rates (from 11% to 26% and 4% to 16%, respectively), their overall engagement remains significantly lower than that of younger generations.

60%

of Gen Z buy new products through social media in 2024, up from 34% last year

Figure 18.

60% of Gen Z consumers have bought products via social media platforms



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers.

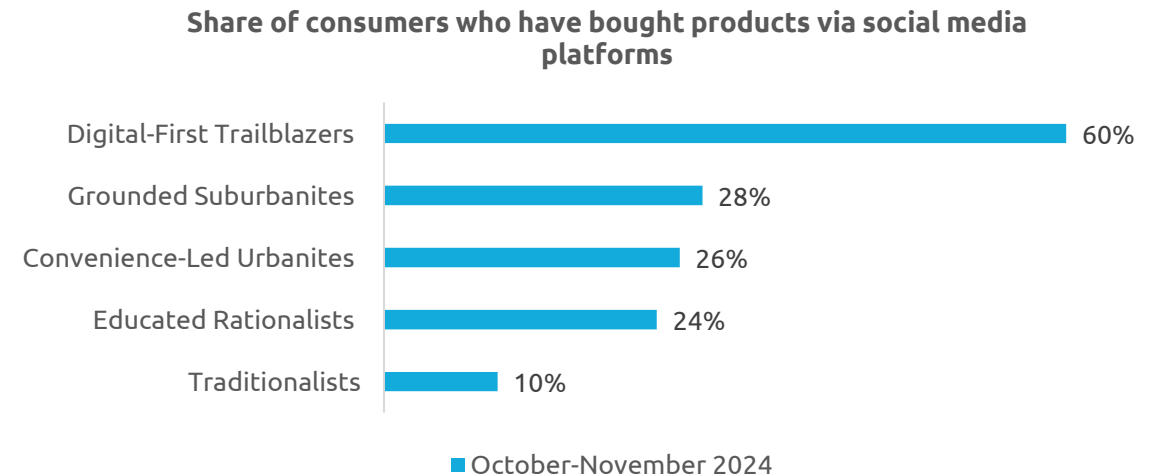
Around 60% of consumers in the Digital-First Trailblazers cluster have bought products via social media platforms. Consequently, this cluster has the highest share among all clusters and more than double the share of the second highest. A key point to note is that this cluster is very tech-savvy and the youngest cluster in our sample, living mostly in urban areas.

Overall, consumers prefer Instagram (50%) and YouTube (49%) as their social media platforms for buying, followed by Facebook (41%) and TikTok (32%). This trend is reflected among Gen Z, with 48% favoring Instagram and 45% YouTube. Among Millennials, 53% favor Instagram and 47% YouTube. These platforms offer strong community engagement and a significant influencer presence.

The Educated Rationalists cluster (58%) shows a strong preference for YouTube, closely followed by the Digital-First Trailblazers cluster (55%), which indicates that, while they engage with social media for shopping, they may prefer platforms that offer more in-depth content and community interaction. These results suggest that video is now a more effective advertising alternative than traditional mediums, at least for some clusters.

Figure 19.

60% of Digital-First Trailblazers consumers have bought products via social media platform



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 12,000 consumers; Educated Rationalists cluster = 2,462 consumers; Convenience-Led Urbanites cluster = 3,556 consumers; Grounded Suburbanites cluster = 1,912 consumers; Digital-First Trailblazers cluster = 2,660 consumers; Traditionalists cluster = 1,410 consumers.

Instagram is the leading choice for Digital-First Trailblazers (56%), Grounded Suburbanites (43%) and Convenience-Led Urbanites (42%), reflecting its visual appeal and influencer-driven marketing strategies. Dove ran influencer-driven campaigns on Instagram, featuring limited-time offers accessible through clickable social media posts.⁹

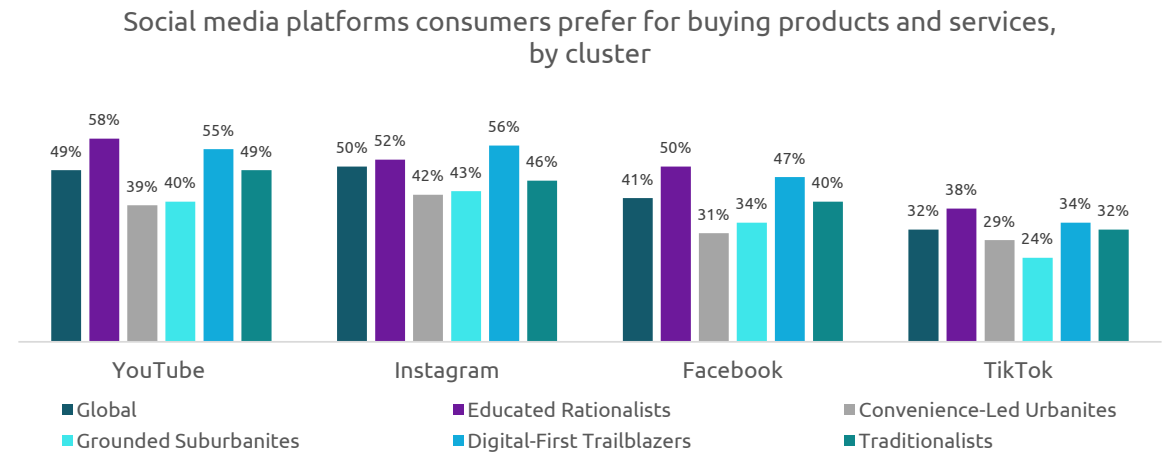
YouTube is the second favorite platform, with 58% of Educated Rationalists favoring it. Facebook follows, favored by 50% of Educated Rationalists. These clusters harness the principle of 'social proof', with promoted purchases and recommendations from friends and family influencing and reinforcing purchase decisions.

60%

of Digital-First Trailblazers consumers have bought products via social media platform

Figure 20.

Instagram and YouTube are the top social media platforms among consumers



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers; Educated Rationalists cluster = 253 consumers; Convenience-Led Urbanites cluster = 371 consumers; Grounded Suburbanites cluster = 117 consumers; Digital-First Trailblazers cluster = 139 consumers; Traditionalists cluster = 120 consumers.

Consumers frequently purchase multiple product categories via social media

Nowadays, social media trends shape consumer preferences, driving the popularity of various product categories. Meta partnered with Amazon to allow shoppers to buy via Facebook and Instagram ads. Through this collaboration, Meta enables users to link their Facebook and Instagram accounts to Amazon, buying items they see through their social media feeds without having to leave Meta's platforms,¹⁰ generating more dynamic, interactive shopping behaviors.

Around one-quarter (26%) of consumers frequently purchased groceries via social media in 2024, compared with 22% in 2023. A similar proportion (24%) made frequent purchases in apparel and accessories, personal care products, and household supplies. Almost half (49%) occasionally purchased meal kits in this way (figure 21).

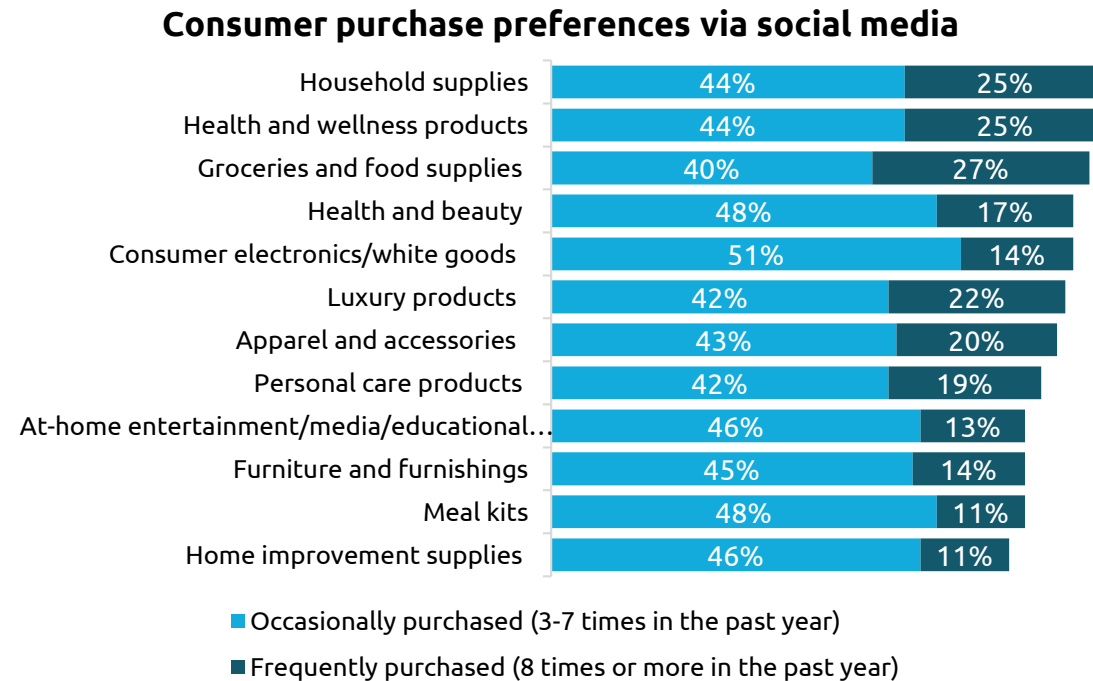
Social media: A parallel consumer universe

Although live shopping is just starting to grow in the US, it is already big in China. Live stream shopping, a subsector of e-commerce, involves broadcasting live video streams where hosts present and sell products in real time. The livestreaming market in China is projected to be worth over \$300 billion by 2025.¹¹ Daniel Fisher, UK General Manager of livestream shopping platform Whatnot, says: "Livestream shopping is incredibly engaging because it replicates the best of the personalized in-store experience, where you can directly engage with a passionate seller and see a product being held or used."¹² On June 8th 2024, Canvas Beauty set a TikTok US record with a six-hour livestream that achieved \$1 million in sales.¹³ TikTok Shop also hosted various discount days in the summer in collaboration with NYX Professional Makeup and L'Oréal Paris, among others.¹⁴

¹⁰ Campaign Asia, "Meta partners with Amazon to let shoppers buy directly from Facebook and Instagram ads," November 2023.

Figure 21.

Apparel and groceries are the most popular purchase categories via social media



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 3805 consumers who have purchased on social media.

While numerous consumers frequently engage with social media for livestreaming events, consumers are also exploring social media platforms for customer support, product reviews, and shared shopping.

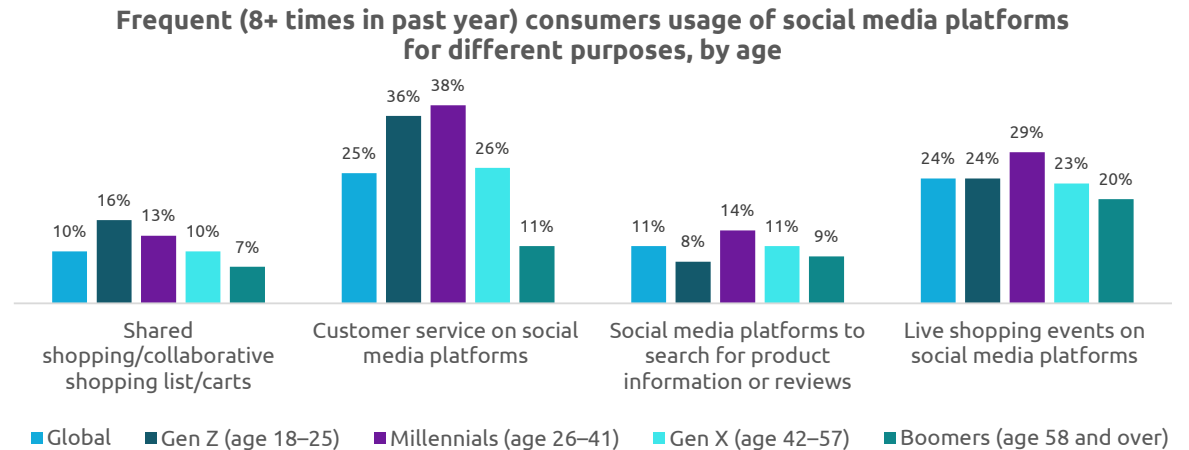
- Live shopping events, blending retail with entertainment, attract a sizeable 74% of consumers for occasional use (3–7 times in the past year), with 24% participating frequently.
- A significant 70% of consumers occasionally use social media to search for product information or reviews. This highlights the platform's role as a primary resource for informed purchasing decisions, even if only 11% engage frequently.
- While 49% of consumers occasionally use social media for customer service interactions, a notable 25% do so frequently. This indicates a growing reliance on social media for resolving issues and seeking support.

Social media influencers are impacting Gen Z

Social media influencers have become key players in shaping how consumers discover and purchase products, leveraging their reach and authenticity to drive engagement. By curating content and sharing personal experiences, influencers significantly impact consumer decisions, transforming traditional marketing into a more relatable and interactive experience.

Figure 22.

27% of consumers say they frequently use social media for customer service



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N=1,000 consumers.

¹¹ Brand Equity, "In delicate China play, Reckitt turns to livestreaming to sell condoms," March 2024.

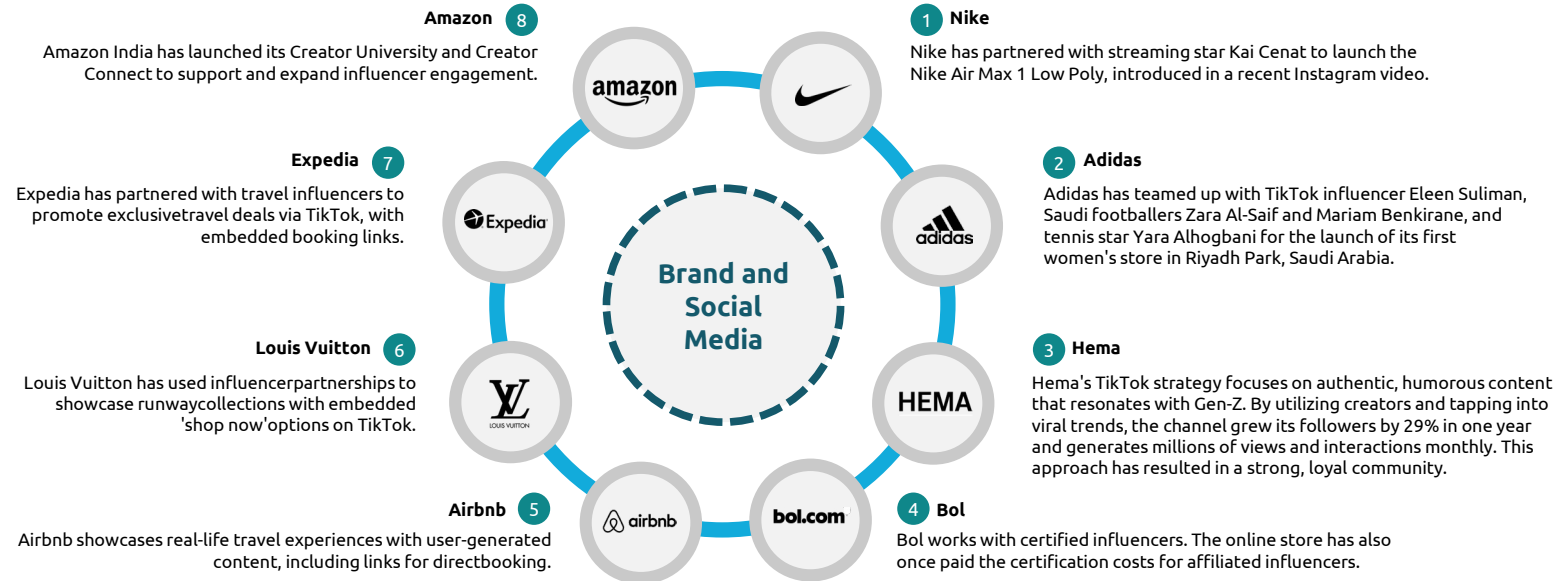
¹² The Industry Fashion, "A sign of the times: Is live shopping the future of retail?" May 2024.

¹³ Market place pulse, "TikTok's First \$1 Million Shopping Livestream," June 2024.

¹⁴ Retail Dive, "More than half of US Gen Z's are headed to TikTok Shop this season," Sept 2024.

Figure 23.

Multiple brands and retailers are collaborating with social media influencers



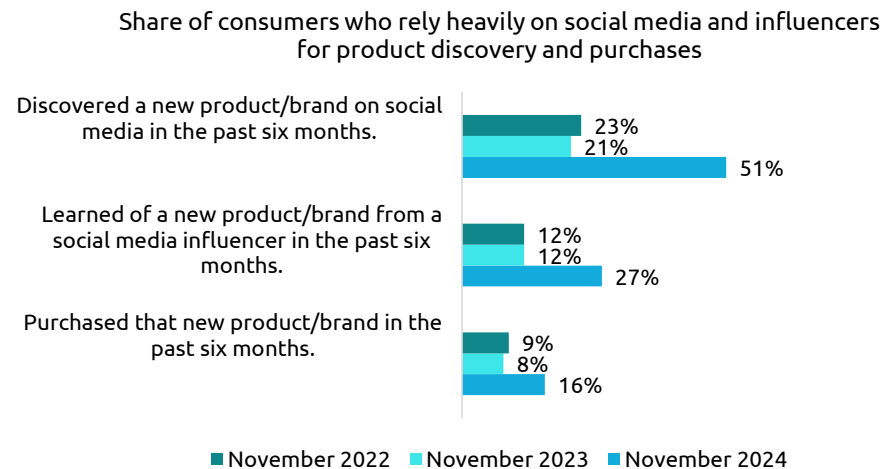
1. Underthelaces, "Kai Cenat teams with Nike to reveal "Low Poly" Air Max 1," September 2024.
2. Campaignme, "Adidas collabs with Saudi influencers to champion female empowerment," October 2024.
3. MarketingTribune, "Interview: Hema verovert TikTok met humor en authenticiteit", December 2024.
4. Adformatie, "Bol gaat werken met gecertificeerde influencers", December 2024
5. Retaildive, "Walmart launches immersive digital shopping experience," May 2024.
6. Eventmarketer, "Walmart taps into TikTok trends and fashionistas for its 40-city style tour," October 2024.
7. PlanetMedia, "Airbnb's successful digital marketing strategy and business model explained!" May 2024.
8. Marketing91, "Marketing mix of Louis Vuitton and 4Ps," January 2024.
9. Adage, "How Expedia is teaming up with creators," September 2024.
10. Inc42, "Amazon launches 'Creator University' and 'Creator Connect' with an eye on influencer economy," June 2024.

There is a growing reliance on social media as a primary channel for product discovery.

- The percentage of consumers discovering new products or brands on social media surged to 51% in November 2024, up from 23% in November 2022.
- The proportion of consumers learning about new products or brands from social media influencers has also increased significantly, reaching 27% in November 2024, up from 12% the previous year. This trend underscores the expanding role of influencers in shaping consumer awareness and preferences.
- The percentage of consumers who purchased a new product or brand in the past six months is stable, at 16% in November 2024, up from 8% in November 2023, and 9% in November 2022, indicating fluctuating awareness and discovery.

Figure 24

Social media influencers are having a great impact on consumers

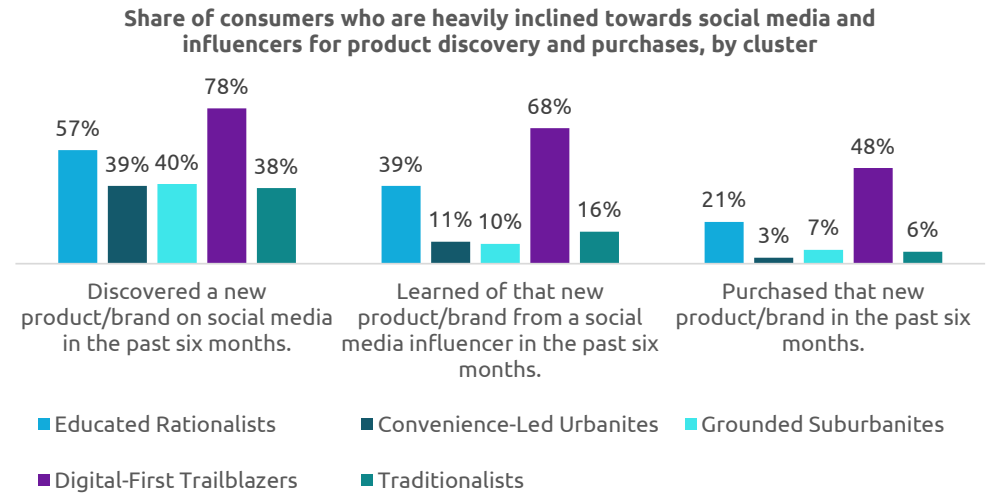


Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers; Capgemini Research Institute, What matters to today's consumer, January 2024, Capgemini Research Institute, Consumer demand survey, October–November 2023.

A key point is that the Educated Rationalists cluster and Digital-First Trailblazers cluster lead in product discovery and purchase. With average ages of Digital-First Trailblazers at 37 and Educated Rationalists at 56, this suggests that older consumers should also be a target market for social media.

Figure 25.

Consumers in the Educated Rationalists cluster and Digital-First Trailblazers cluster are more influenced by social media influencers



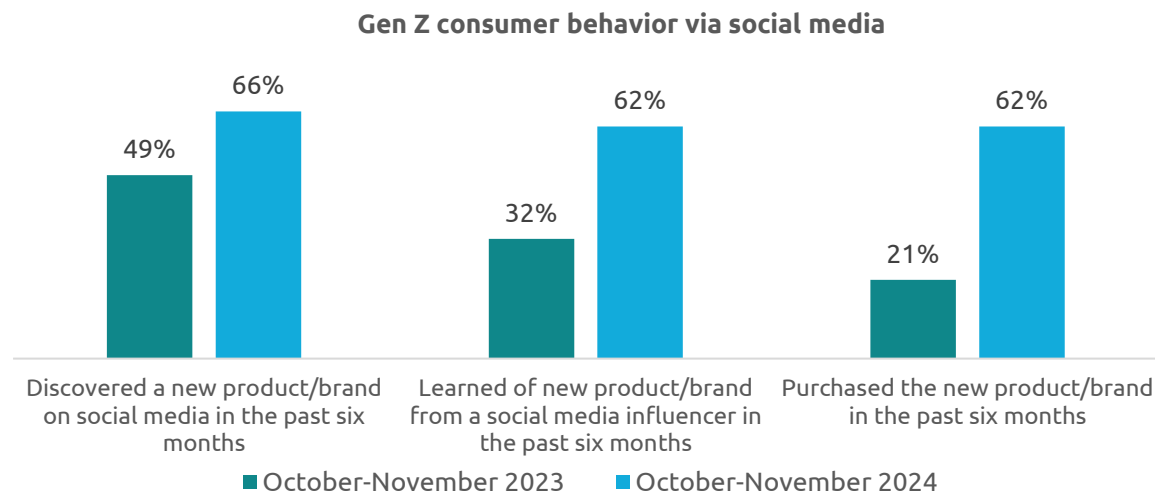
Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers; Educated Rationalists cluster = 253 consumers; Convenience-Led Urbanites cluster = 371 consumers; Grounded Suburbanites cluster = 117 consumers; Digital-First Trailblazers cluster = 139 consumers; Traditionalists cluster = 120 consumers..

Social media and influencers carry more weight with Gen Z

In November 2024, 66% of Gen Z showed a strong preference for discovering products through social media, up from 49% in November 2023. Social media influencers fueled this trend, with their impact rising from 32% in 2023 to 62% in November 2024. The percentage of Gen Z who bought new products via social media almost tripled to 62% in this period.

Figure 26.

69% of Gen Z consumers learned of a new product/brand from a social media influencer



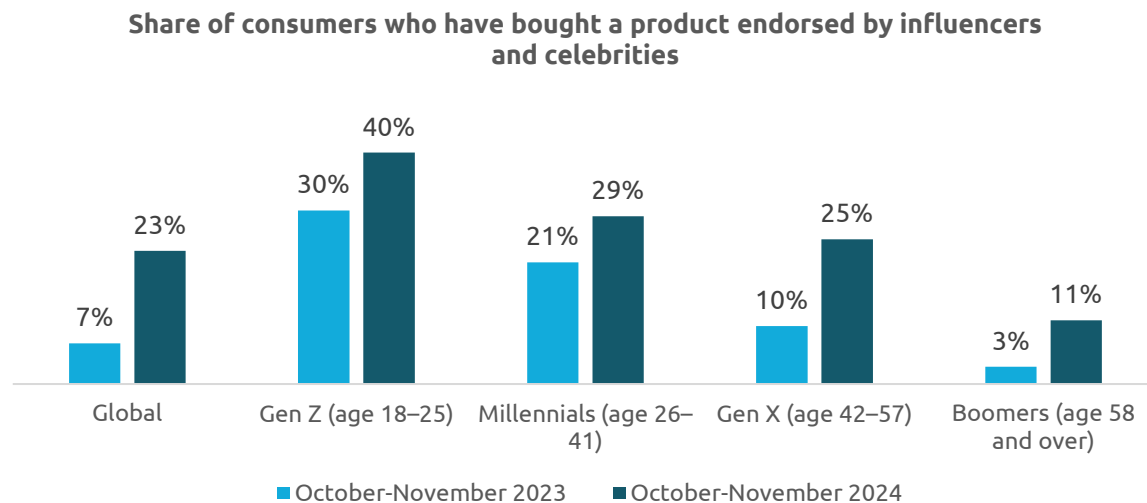
Source: Capgemini Research Institute, Consumer Demand survey, October–November 2023, N = 1,048 Gen Z consumers; October–November 2024, N = 1,394 Gen Z consumers.

One-quarter of consumers have bought products endorsed by influencers or celebrities

Consumers globally (particularly younger cohorts) are purchasing more products endorsed by influencers and celebrities, rising from 7% in October-November 2023 to 23% in the same period in 2024. Gen Z remains the most engaged cohort, with 40% reporting purchases influenced by celebrities or influencers in both years, underscoring their target-market status. Millennials also show a slight increase, from 21% to 29%, while Gen X engagement has risen from 10% to 25%. This indicates that, with a tailored approach, influencers could be effective across cohorts.

Figure 27.

45% of Gen Z consumers have bought a product endorsed by influencers and



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N =1,000 consumers.



Retail media networks: Capturing the shopper's attention

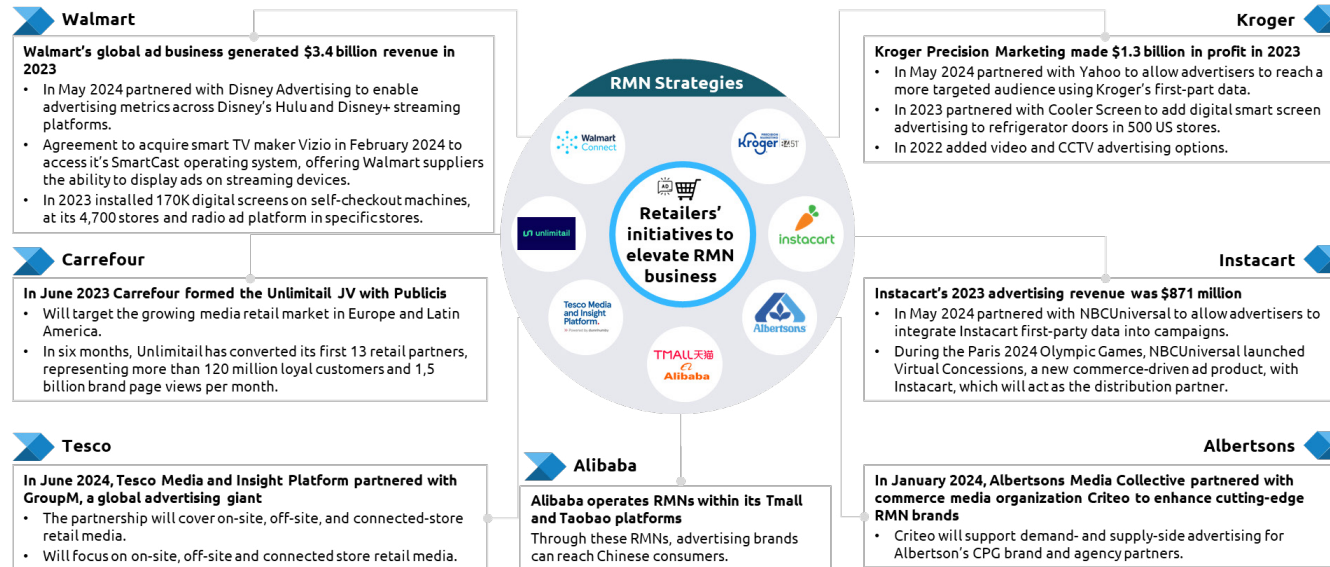
Retailers in the Netherlands are starting to make significant media investments

Retail Media Networks (RMNs) are growing strongly due to their unique business model, which benefits retailers, brands, and consumers. RMNs help large retailers to

monetize their digital platforms, often with higher margins than traditional retail operations. For brands, RMNs offer a platform to harness first-party consumer data, helping them reach their audiences with targeted advertising and personalized shopping experiences. Globally, there are more than 200 RMNs, with major players being Amazon, Walmart, Instacart, Kroger, Albertsons, Carrefour, Alibaba, and Target. In the Netherlands, Albert Heijn and Jumbo are the major players, with other retailers such as SPAR also gaining traction. The surge in online shopping and the abundance of first-party data for targeted advertising is driving the expansion of RMNs.

Figure 28.

Retailers are focusing on RMNs



Sources:

For NL, include Albert Heijn, Jumbo and SPAR, and leave Walmart, Carrefour and Albertson's in as global examples

Albert Heijn:

Albert Heijn is quite active in the Retail Media space through its AH Retail Media Services division. Some key initiatives include:

- Video advertisements: Advertisers can place video ads on Albert Heijn's website (ah.nl) and in the AH app.
- Offsite display proposition: This offers targeted ads based on customer insights.

Sources:

- In-store performance dashboard: This new dashboard helps advertisers set up and optimize campaigns.
- Omnichannel approach: AH Retail Media Services provides a wide range of media solutions, both online and offline, to help brands grow

Jumbo:

Jumbo is actively expanding its presence in the Retail Media space. It has introduced a self-service platform, allowing brand manufacturers to manage their own product campaigns. They increasingly focus on offering personalized experiences using data analytics and AI - by analyzing customer preferences and shopping habits, they can tailor messages and offers to individual customers.

SPAR:

SPAR media is the Netherlands' first retail media network in the convenience space, giving advertisers the opportunity to advertise to a highly relevant and unique shopper audience at the right location and right time.

Sources:

Albert Heijn

<https://nieuws.ah.nl/nieuwe-proposities-en-innovaties-op-ah-retail-media-evenement-van-albert-heijn/>

<https://www.ahretailmediaservices.nl>

Jumbo

<https://retail-optimiser.de/en/jumbo-expands-retail-media-with-self-service-platform-from-streame/>
<https://www.retaildetail.eu/news/food/jumbo-starts-2024-looking-at-how-it-is-meant-to-be/>
 Spar
<https://www.vml.com/work/spar-retail-media-case>

Walmart

1. Search Engine Land, "Walmart Connect opens up to small and non-endemic advertisers," April 2024.
2. Statista, "Walmart advertising revenue worldwide in fiscal years 2021 to 2023," April 2024.
3. Disney, "Disney Advertising and Walmart Connect to bring closed-loop attribution to streaming advertisers," May 2024.
4. Walmart, "Walmart agrees to acquire VIZIO HOLDING CORP. to facilitate accelerated growth of Walmart connect through Vizio's smart cast operating system," February 2024.
5. US Chamber, "Businesses large and small tap multibillion-dollar Retail Media Network trend for growth," March 2024.
6. Carrefour, "Carrefour Group and Publicis Groupe launch Unlimitail with its first 13 retail partners to seize the booming retail media market in Continental Europe, Brazil and Argentina," June 2023.
7. Albertsons
8. PR News, "Albertsons Media Collective selects Criteo to power its retail media ecosystem," January 2024.
9. Alibaba(Tmall).
10. Tokinomo, "Top 9 Retail Media Networks you need to keep an eye on in 2024," October 2023.

Advertisements on retailer websites and apps attract the most attention across channels

As much as 74% of Dutch consumers notice ads on retail websites or apps when they search for a product, the highest across channels. For instance, 67% of consumers pay attention to social media ads, with 74% finding them relevant. Only 41% of consumers notice retail website/app banner ads when they open the website or app, even though 62% of consumers consider them relevant. Similarly, ads during online searches and on streaming services have higher relevance but lower levels of attention. In offline channels, over half of consumers are attentive to ads during sports, award shows, charity events, print media, and on outdoor billboards, but fewer than one-third find them relevant. Nearly half of consumers pay attention to TV and radio ads. Consumers slightly prefer in-store displays and video ads to TV.

Figure 29.

74% of consumers notice ads on retailer websites and apps compared with 63% on social media

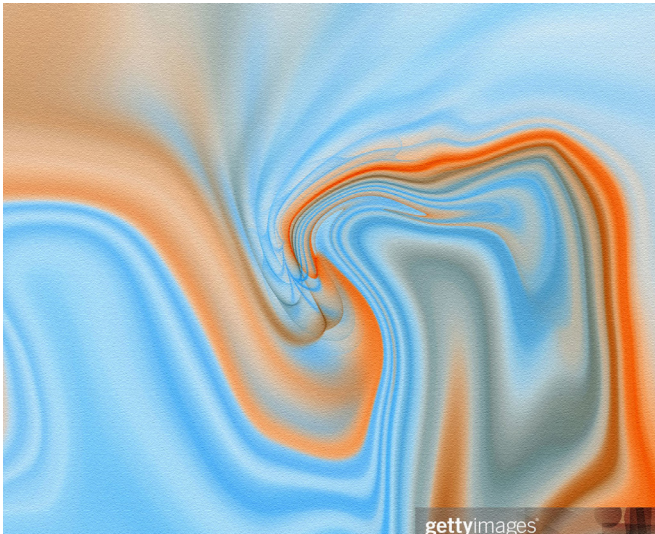
Attention level and relevancy of ads viewed by consumers			
How attentive are you to the ads that you see from the following			
November 2024	Global	Netherlands	
Retail website/app ads when you search for a product	67%	74%	
Ads on social media platforms	63%	67%	
Ads shown during sports, award shows, charity events	59%	62%	
Ads on print media (newspaper, magazine)	56%	61%	
Outdoor billboards, digital signage/screens	54%	59%	
In-store display and video ads	49%	51%	
Ads on traditional television/ radio	48%	49%	
Ads during online search	43%	46%	
Podcasts	37%	44%	
Retail website/app banner and video ads when you open the website/app	36%	41%	
Ads on streaming services	32%	38%	
How relevant do you find the ads meeting your needs from the following			
November 2024	Global	Netherlands	
Retail website/app ads when you search for a product	67%	73%	
Ads on social media platforms	68%	74%	
Ads shown during sports, award shows, charity events	30%	36%	
Ads on print media (newspaper, magazine)	28%	34%	
Outdoor billboards, digital signage/screens	33%	39%	
In-store display and video ads	49%	51%	
Ads on traditional television/ radio	47%	52%	
Ads during online search	63%	67%	
Podcasts	36%	42%	
Retail website/app banner and video ads when you open the website/app	59%	62%	
Ads on streaming services	54%	61%	

Source: Caggeginni Research Institute, Consumer Demand survey, October–November 2024, N = 12,000 consumers.

Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 12,000 consumers.

Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 12,000 consumers.

A total of 50% of Dutch consumers found the ads on retailers' websites/apps helpful for direct ordering and 45% discovered new products by watching ads. Nearly one-third of consumer shopping baskets were influenced by ads while shopping online, with the highest impact on personal care products (37%), followed by health and beauty (34%).




Consumers find in-store advertisements less satisfying than those online

In-store ads have a significant impact: 44% of consumers discover new products this way. Over half (59%) of consumers want to see ads that cater to their non-retail needs, such as insurance, travel, and healthcare.

We found that 48% of consumers are satisfied with in-store ads, compared with 75% satisfaction with online ads, regarding content quality and placement. There are several reasons for consumer dissatisfaction.

- 64% of consumers say the ads shown are very generic and don't serve their specific needs.
- 61% want personalized in-store ads via a display in a smart shopping cart, smart mirrors, or interactive touchscreens.

03 | How are people shopping?

An abstract graphic on the left side of the slide featuring vibrant, swirling colors like green, yellow, orange, and purple, creating a sense of movement and depth.

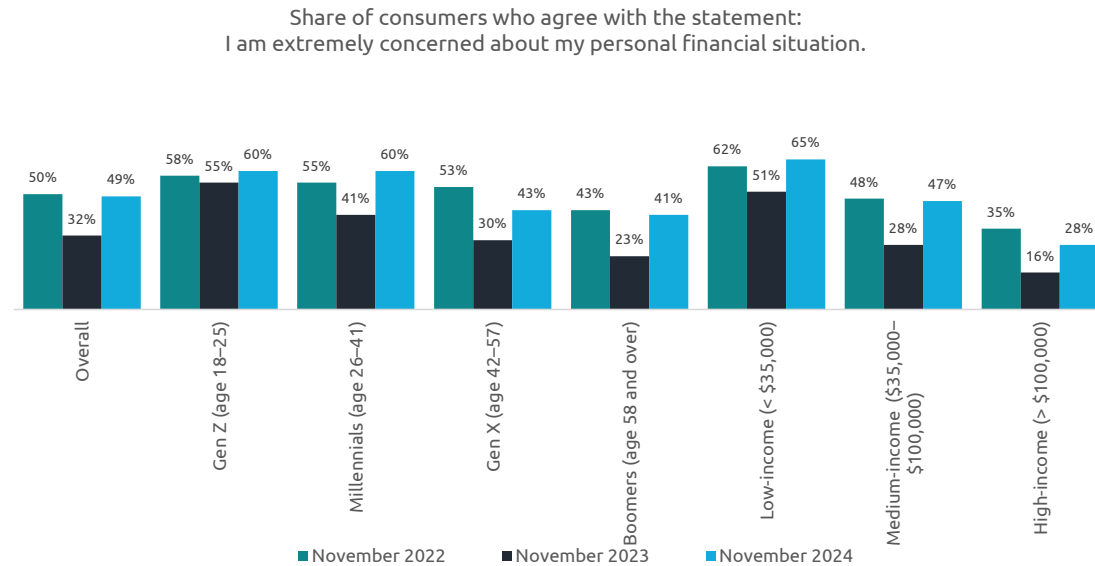
Seeing the light: The beginning of the end of the cost-of-living crisis?

The cost-of-living crisis continues to impact consumers, but the situation has improved

The cost-of-living crisis has increased, with 49% of consumers worried about their finances versus 32% last year. The level of concern varies by age group.

Figure 32.

Consumers are less concerned about their personal financial situation this year



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024; N = 12,000 consumers: 1,394 Gen Z consumers, 3,219 Millennial consumers, 3,757 Gen X consumers, 3,630 Boomer consumers; Capgemini Research Institute, Consumer Demand survey, October–November 2023; Capgemini Research Institute, What matters to today's consumer, January 2023.

Although consumers in the Grounded Suburbanites cluster are most concerned with the cost-of-living crisis, they have made fewer changes to their purchasing habits than Digital-First Trailblazers.

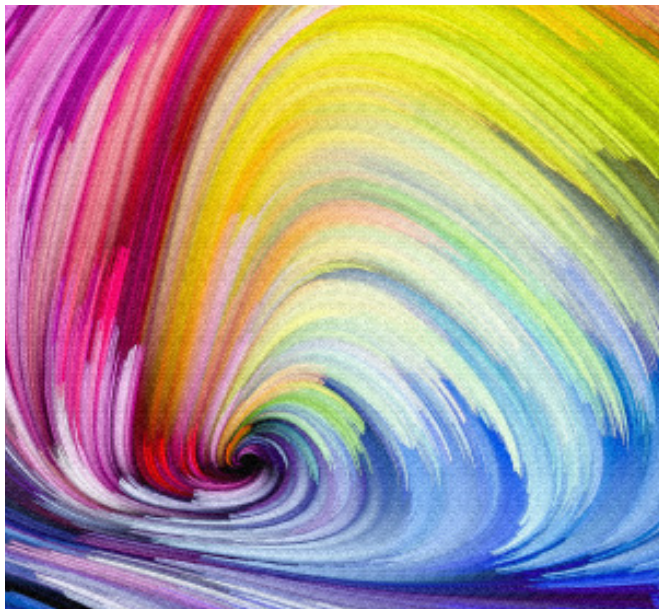
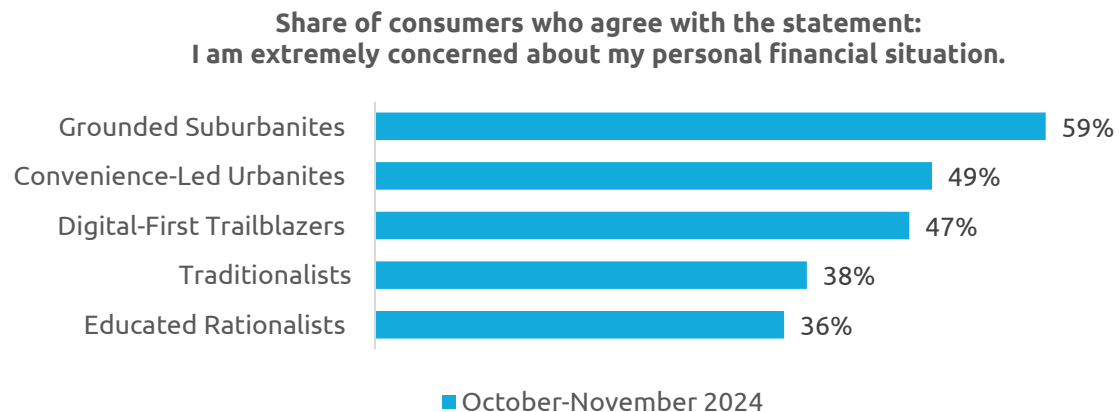


Figure 33.

Grounded Suburbanites were most concerned about their personal financial situation in



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 12,000 consumers; Educated Rationalists cluster = 2,462 consumers; Convenience-Led Urbanites cluster = 3,556 consumers; Grounded Suburbanites cluster = 1,912 consumers; Digital-First Trailblazers cluster = 2,660 consumers; Traditionalists cluster = 1,410 consumers.

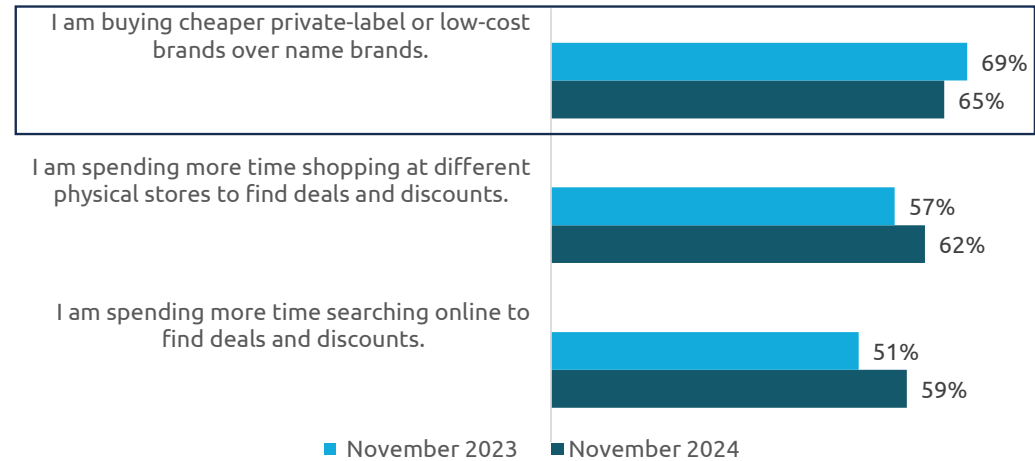
Consumers still prioritize discounts and private labels

While concerns about the cost-of-living crisis have lessened, consumers still seek discounts. In 2024, 62% of shoppers visited multiple physical stores for deals, up from 57% the previous year, while 59% spent more time searching for deals online compared with 51% previously.

Figure 34.

Consumers remain cautious

Share of consumers who agree with the following statements:

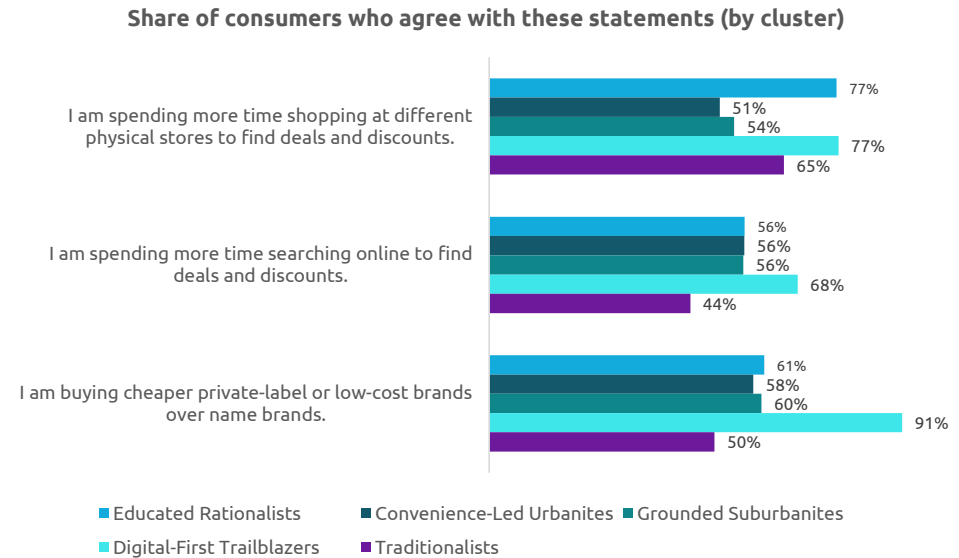


Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 12,000 consumers, Capgemini Research Institute, What matters to today's consumer, January 2024.

Private-label sales are on the rise as consumers look for more affordable options. US private-label sales reached \$236.3 billion in 2023. Retailers such as Walmart, Target, and Kroger are broadening their private-label offerings in areas such as food and beverage, household essentials, and apparel to capitalize on this trend. Competitive pricing can attract cost-conscious shoppers, while using economics of scale to maintain quality promotes customer loyalty. One in five units sold in 2023 was store-branded, which is a record.¹⁷

Figure 35.

More than 90% of Digital-First Trailblazers are buying private-label brands



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 12,000 consumers; Educated Rationalists cluster = 2,462 consumers; Convenience-Led Urbanites cluster = 3,556 consumers; Grounded Suburbanites cluster = 1,912 consumers; Digital-First Trailblazers cluster = 2,660 consumers; Traditionalists cluster = 1,410 consumers.

In 2024, 65% of consumers bought private-label or low-cost brands, up from 63% the previous year. No fewer than 91% of Digital-First Trailblazers bought private labels, which is the highest across all categories. Around half (49%) of consumers prefer a white label/private label product to a premium brand in the same category. Gen Z (80%) and Millennials (77%) lead this trend; 57% of apparel and accessories purchases and 41% of groceries are private label.

65%

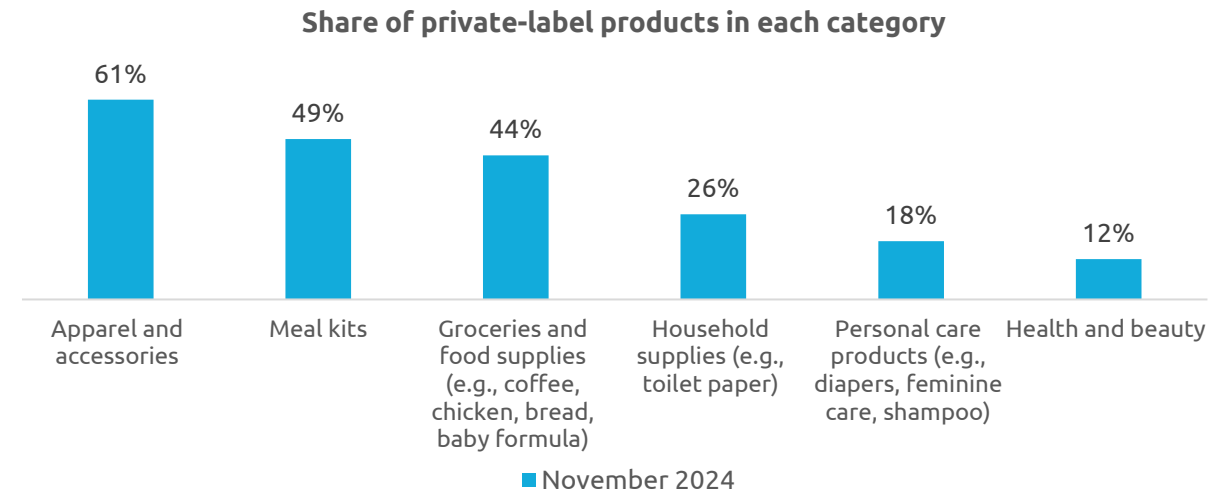
of consumers are buying cheaper private-label or low-cost brands over name brands

¹⁶ Convenience Store News, "Private label brands reached record dollar sales in 2023," March 2024.

¹⁷ Forbes, "Big retail's trending brand is private label, led by Gen Z," March 2024.

Figure 36.

The share of private-label products is significant in multiple categories



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 12,000 consumers.

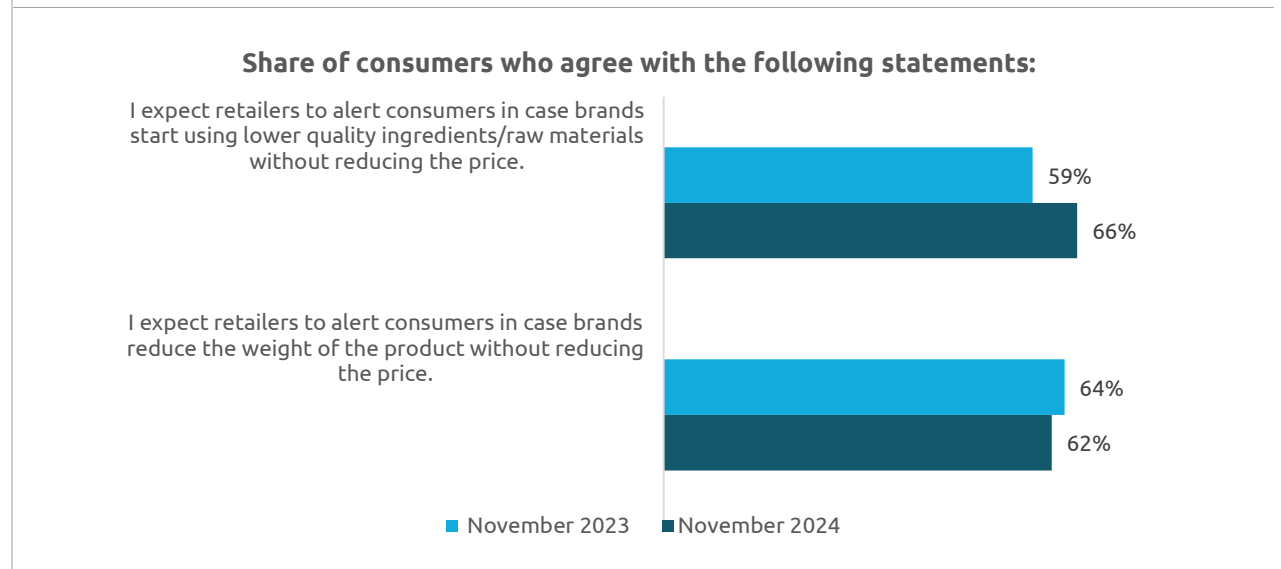
Shrinkflation leads to new legislation and is still a key consumer concern

Three-quarters (73%) of Millennials expect retailers to provide alerts when brands reduce the weight of a product without reducing the price (a phenomenon known as 'shrinkflation'). Globally, this figure is the same as 2023, at 65%. French supermarket chains Intermarché¹⁸ and Carrefour¹⁹ alert consumers to products impacted by shrinkflation. According to a Carrefour spokesperson: "To combat shrinkflation without penalizing customers, the group has implemented a strategy aimed at identifying any product affected by this practice so that its prices can be corrected in advance with its suppliers and its pricing policy."²⁰

To combat shrinkage, the French Ministry of Economy issued a decree effective from July 1st 2024. It requires medium-to-large supermarkets to display per-unit prices and quantity changes next to affected products on store shelves for two months after any change. This rule applies to goods, including food and household items, in stores with footprints larger than 400 m².²¹

Figure 37.

Two in three consumers want shrinkflation alerts



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 12,000 consumers, Capgemini Research Institute, What matters to today's consumer, January 2024.

¹⁸ Retaildetail, "Unilever sues Intermarché after accusations of shrinkflation," January 2024.

¹⁹ CNBC, "French grocery chain adds 'shrinkflation' labels to products in bid to shame supplier pricing," September 2023.

²⁰ EuroNews, "'Shrinkflation' stickers come into force in French supermarkets," July 2024.

²¹ BFM RMC, "Shrinkflation: what will mandatory signage look like in supermarkets from July 1?" May 2024.

Online gains ground but in-store shopping retains value

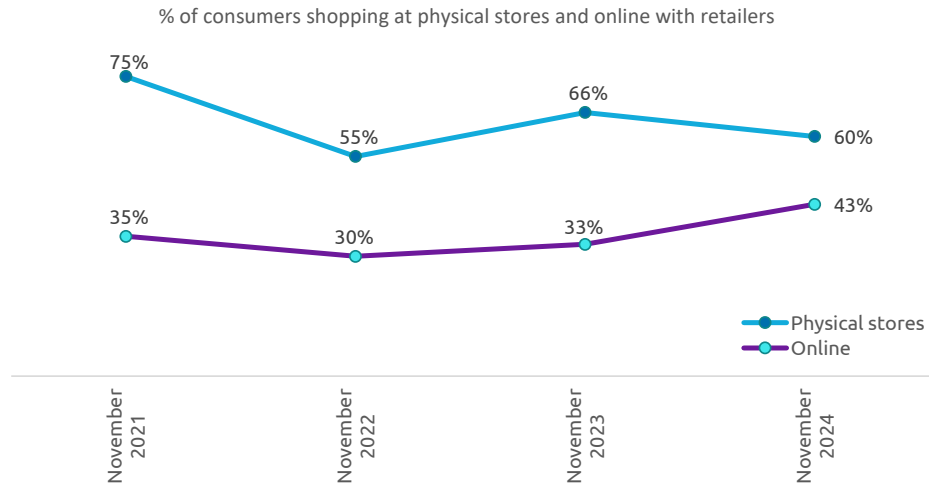
In November 2024, 60% of consumers said they had interacted significantly with physical stores, down from 66% in November 2023. This compares with 43% who shopped online in November 2024, up from 33% in November 2023.

In 2024, the preference for in-store shopping increased with age:

- 63% of boomers (aged 58 and over), down from 72% in November 2023, report high levels of in-store interactions. Meanwhile, only 55% of Gen Z report the same, a percentage that has remained virtually unchanged since November 2023. A high 66% of consumers in the Traditionalists cluster have frequent interaction with physical stores.

Figure 38.

Consumers are integrating more with online stores



Sources: Capgemini Research Institute, Consumer demand survey, October–November 2024, N = 1,000 consumers

Note: The question asked was “Please indicate your frequency of using physical stores when shopping with retailers. Please rate on a scale of 1 to 7, where 1 = very low interaction and 7 = very high interaction.”

04 | The grass is greener: Why consumers are switching brands

Lack of personalization is a key reason to switch brands and retailers

Over half (53%) of the Dutch consumers switch brands/retailers regularly, despite subscribing to their loyalty programs. Over half (51%) of Gen Z consumers²² find new brands through TikTok, stressing the platform's influence among the youngest consumers. Gen Z consumers are also the most likely (32%) to have abandoned a brand over a 12-month period.²³

Gen Z consumers are more open to switching brands/retailers. As many as 70% of consumers globally and 75% of Gen Z consumers have switched as an experiment. Another major reason for switching brand/retailer, as stated by 70% of Gen Z consumers, was that membership programs and shared preference data failed to result in a better experience (figure 39). This highlights the key issue of lack of value exchange. Consumers seek this when they sign up for a membership program, but they do not get a better experience. This is also a key reason for consumers to switch retailers, as stated by 66% of Dutch consumers.

Figure 39.

Experimentation and lack of personalization are major reasons for switching brands

Reasons cited by consumers for switching brands



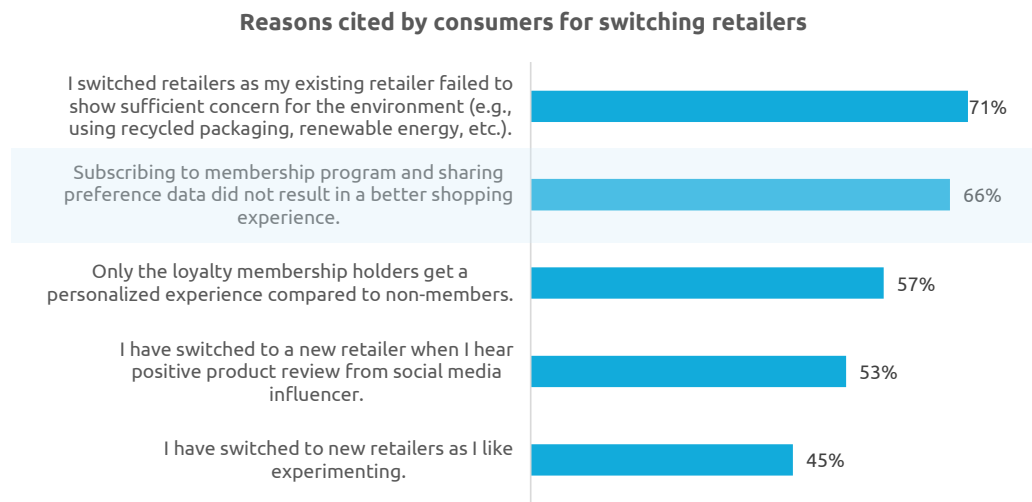
Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 12,000 consumers.

Lack of sustainability was cited by 71% of Dutch consumers as the reason to switch retailers in 2024. In the previous year, sustainability was relegated to value among certain demographics; with the cost-of-living crisis, there are some indicators that sustainability was important in 2024. For instance, when consumers sign up for membership, it is more value-based and not transactional, leading to a higher focus on sustainability (figure 40).

²³ CapitalOne Shopping, "Brand Loyalty Statistics," May 2024.

Figure 40.

Sustainability and lack of personalization are major reasons for switching retailers



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 12,000 consumers.

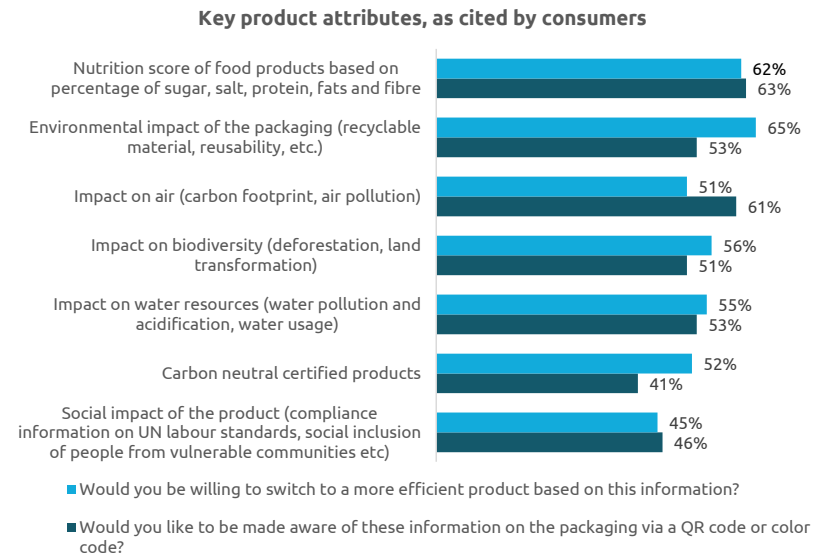
Two-thirds of consumers are willing to switch loyalty based on nutrition scores

Nutrition scores of food products are a key factor in brand choice for 76% of Millennials, 71% of Gen Z, and 67% of consumers globally. In the Netherlands, a significant 63% of consumers would like to receive this information via a QR or color code.

Currently, different nutritional scoring systems are used globally. For instance, Europe uses a color-coded Nutri-Score system that classifies food and drink by nutritional value.²⁴ Based on this score, the product receives a letter with a corresponding code: from dark green/A (which means healthier choices) to dark orange/E (which means less healthy choices). Eight European countries have adopted this scheme: France, Belgium, Germany, Luxembourg, the Netherlands, Spain, Switzerland, and Portugal.²⁵ Nutri-Score is yet to gain traction in North America, which uses the Nutrition Facts Label.²⁶ The UK's front-of-pack nutrition labeling method, with its traffic-light indicators of the levels of fat, saturates, sugars, and salt, is now well established.²⁷ Such systems help consumers make informed food choices and, consequently, encourage organizations to improve the nutritional content of their products

Figure 41.

Consumers demand nutrition scores



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers.

In general, Dutch consumers are less demanding in being made aware of key product attributes on the packaging, compared to the global average. Also, they are less likely to switch products based on this information.

Carbon impact is also a key metric of which 61% of Dutch consumers would like to be made aware. Organizations are introducing multiple initiatives:

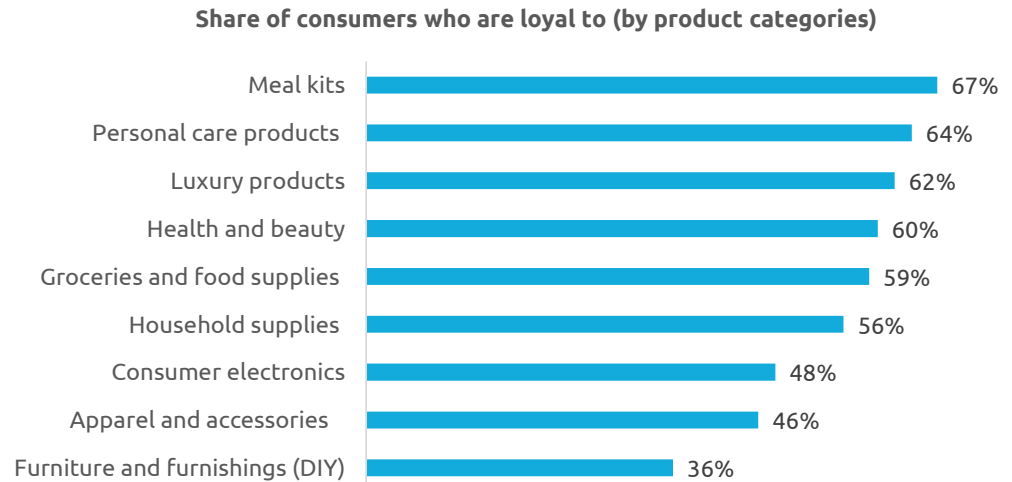
Hilton has introduced carbon labeling for its menus in the UK to inform guests of the environmental impact of their choices when dining at participating restaurants.²⁸ Wholesale food giant, UK Sysco GB, has rolled out a carbon measurement and labeling tool called FoodPrint. FoodPrint measures carbon emissions across the value chain 'from farm to fork'. The organization also considers waste management and packaging choices²⁹

Last-mile delivery services, e-tailers, and meal kit brands command the highest loyalty across categories

Overall, meal kit brands command the highest loyalty, as stated by 67% of Dutch consumers, followed by personal care products (e.g., diapers, feminine care, shampoo) at 64%. Among retailers, last-mile delivery services like PostNL came top, followed by e-tailers (67% and 62%, respectively). Overall, 62% of Dutch consumers state that they do not want to be loyal to just one brand

Figure 42.

Meal kits lead in consumer loyalty



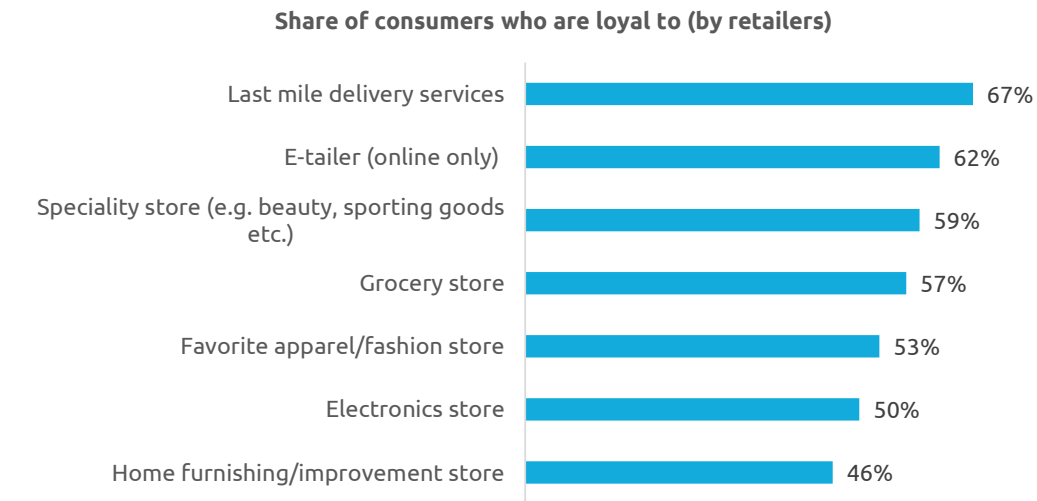
Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers.

²⁸ Hilton, "Hilton's carbon-conscious menu inspires guests to 'Go Low' on emissions," October 2023.

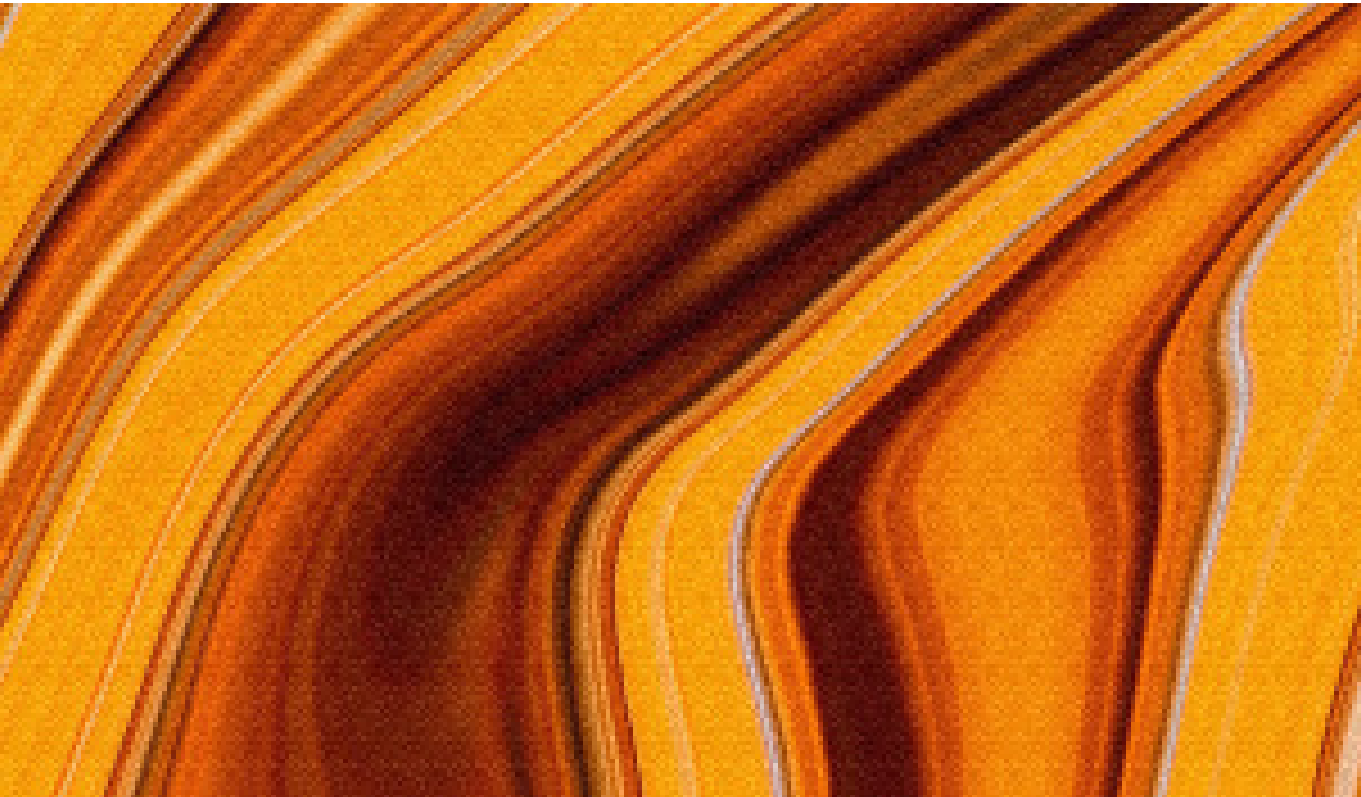
²⁹ Edie, "Wholesale food giant Sysco GB rolls out carbon labelling platform," February 2024.

Figure 43.

Last-mile delivery services enjoy the highest loyalty among retailers



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers.

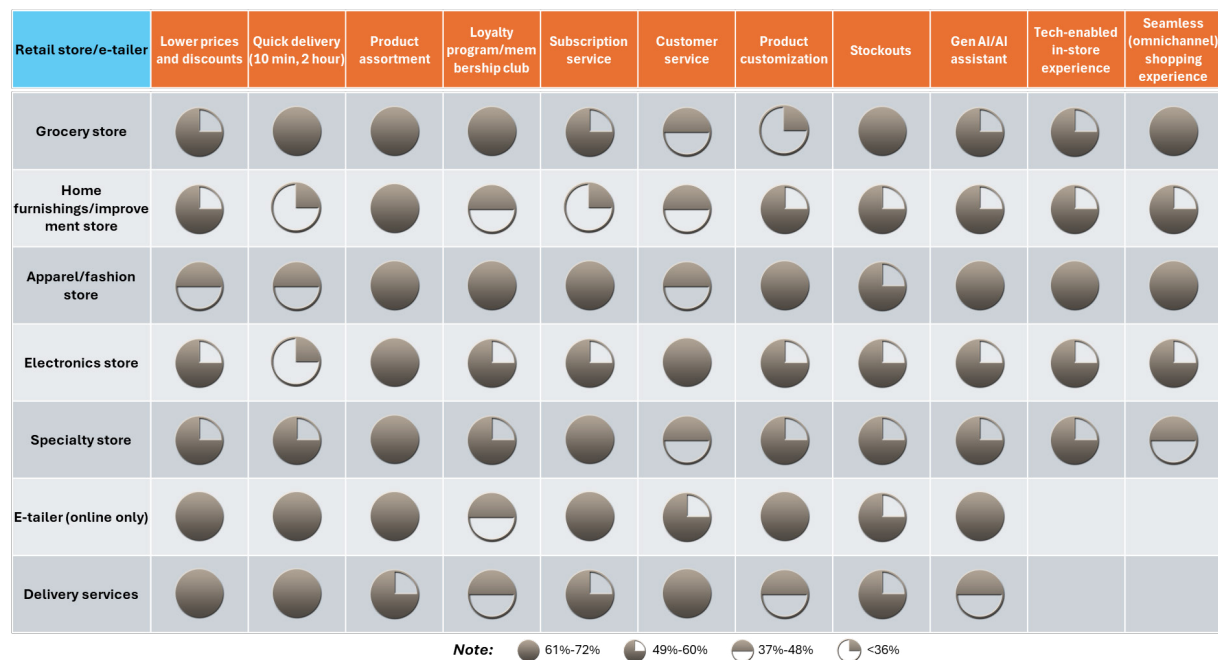


What are the key factors driving loyalty?

In the current retail landscape, consumer loyalty is heavily influenced by a blend of factors. Quick delivery is a significant factor for customer loyalty in retail stores and delivery services. Product assortment and customization are primary loyalty factors for home furnishing and apparel retailers. For electronics and specialty stores, consumers also consider AI assistance and in-store technology important loyalty factors. Among e-tailers, AI assistance is the top loyalty factor. In April 2024, Target launched Target Circle 360. This paid membership program builds on the Target Circle loyalty program by offering unlimited, free, same-day delivery for orders of \$35 and up, along with free two-day shipping. Target now rivals offerings from Walmart and Amazon.³⁰

Figure 44.

Top loyalty factors for retailers



Source: Capgemini Research Institute Analysis, Consumer Demand survey, October–November 2024, N = 12,000 consumers.

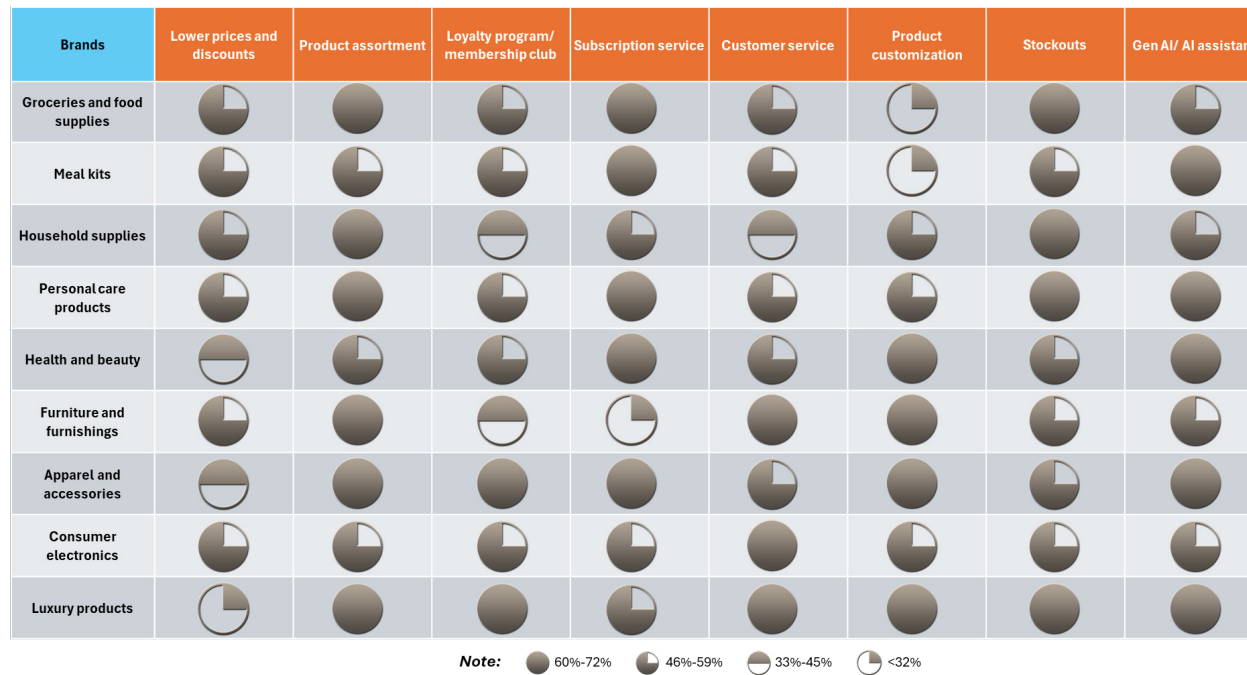
³⁰ Grocerydive, "Target to launch paid membership program to rival Amazon Prime, Walmart+," March 2024.

Consumers demonstrate a strong preference for brands that provide personalized experiences. AI assistance is the top factor for loyalty across

multiple brand categories. Stockout is a key factor mentioned by consumers for grocery and food brands (figure 45).

Figure 45.

Top loyalty factors for brands



Source: Capgemini Research Institute Analysis, Consumer Demand survey, October–November 2024, N = 12,000 consumers.



05

**Recommendation:
Adapt with the consumer**

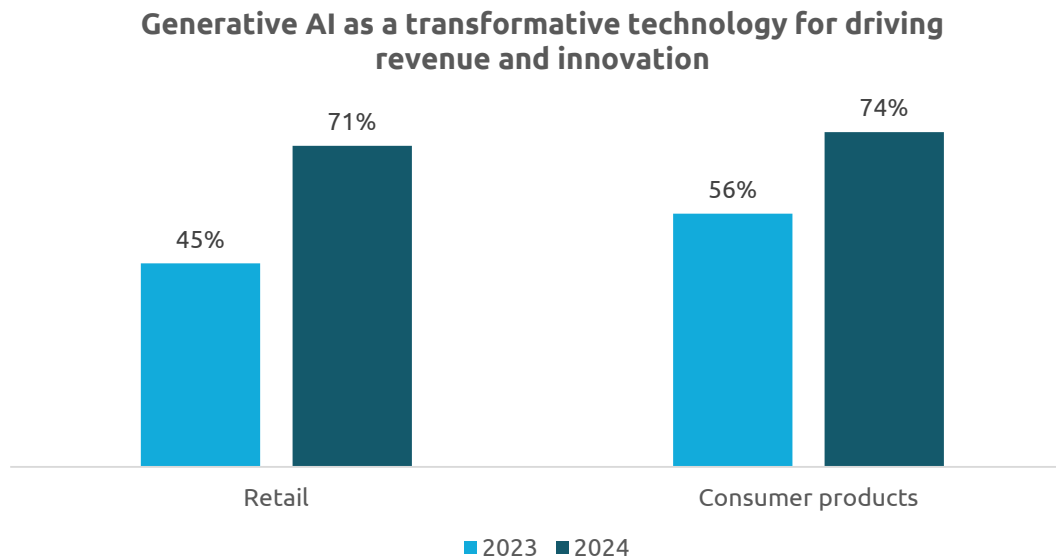
Adapt to compete

Augment Gen AI tools to become more consumer-centric

As many as 71% of retail organizations and 74% of consumer products organizations now view Gen AI as a transformative technology, up from 45% and 56%, respectively, in 2023.

Figure 46.

7 in 10 consumer product and retail firms view Gen AI as a transformative technology



Source: Capgemini Research Institute, Harnessing the value of generative AI 2nd edition: Top use cases across sectors, July 2024

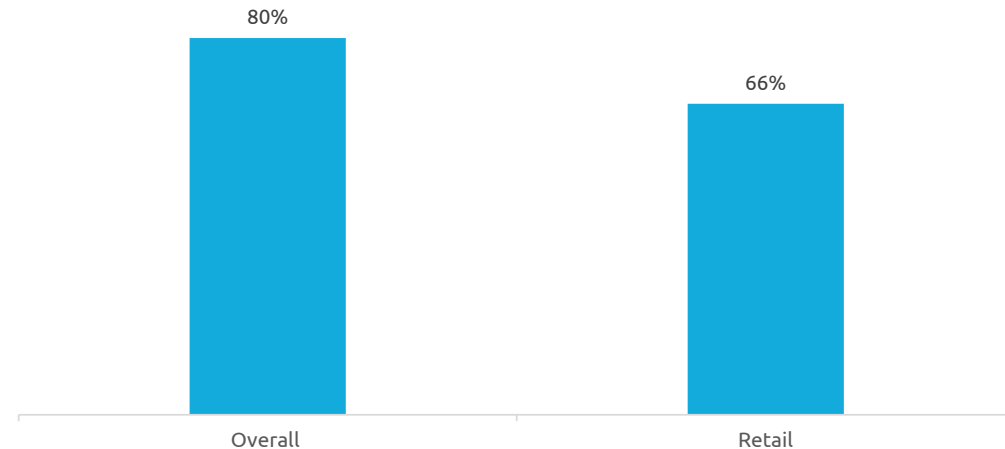
Although 80% of organizations across all sectors boosted their investments in 2024, a much lower proportion in the retail sector has done so, at 66%.³¹ However, some retail and consumer product firms are investing in multiple Gen AI use cases to boost customer-centricity.

- Albert Heijn: 'With generative AI, we are able to develop applications that offer our customers more convenience and inspiration in their everyday lives' (Marit van Egmond, CEO of Albert Heijn)
- Walmart has created a Gen AI-powered Content Decision Platform to tailor a unique homepage for each individual customer. The updated website is expected to launch in the US by the end of 2025.³²
- Nike is developing a Gen AI model to design products using its extensive athlete performance data. The organization highlighted Athlete Imagined Revolution (AIR), a project that saw the design team create prototype shoes for 13 of Nike's top athletes. Nike's innovative use of AI and athlete data marks a significant step forward in personalized sportswear design.³³
- Coca-Cola launched three AI-generated ads for the 2024 holiday season. The highlight is a remake of its 1995 "The Holidays are Coming" ad, featuring Coca-Cola trucks lighting up a snowy forest and town with Christmas lights. This holiday spot was created entirely with generative AI, supported by three AI studios and several large language models.³⁴

Figure 47.

While investment in Gen AI is on the rise globally, the retail sector is still trailing behind

Percentage of organizations that increased their Gen AI investments from 2023

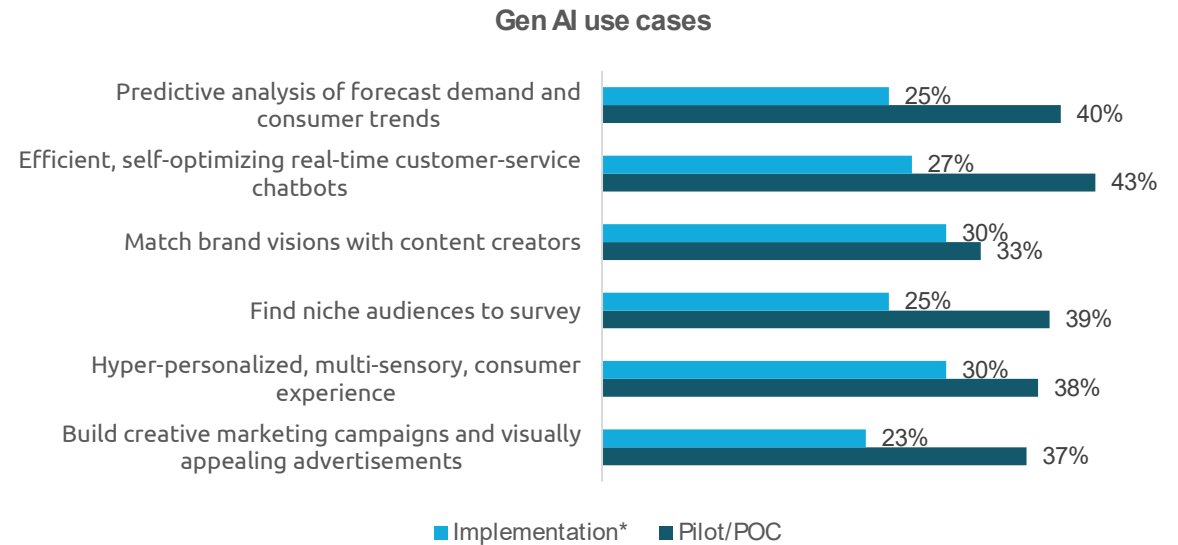


Source: Capgemini Research Institute, Harnessing the value of generative AI 2nd edition: Top use cases across sectors, July

Consumer products and retail firms are implementing multiple Gen AI use cases this year, ranging from hyper-personalized, multi-sensory consumer experiences to building creative marketing campaigns. (Figure 48)

Figure 48.

Gen AI use case implementation for consumer products and retail sector



Source: Capgemini Research Institute, Gen AI executive survey, May–June 2024, N = 1,031 organizations that are at least exploring Gen AI capabilities; N varies per sector use case ranging from 50 to 189.

*"Implementation" means organizations that have partially scaled the functional use case in question

³³ Dezeen, "Nike developing AI model as part of design 'step change,'" May 2024.

³⁴ Emarketer, "Coca-Cola used AI to generate its holiday ad campaign", November 2024

The following steps can help kickstart and augment the Gen AI implementation process:

- Form dedicated marketing teams to integrate Gen AI. Establish a clear governance framework and identify specific areas where AI can deliver significant results.
- Facilitate interdisciplinary collaboration, including your sales and IT teams, to develop tailored solutions aligned with marketing objectives.
- Invest in educating consumers on how to use Gen AI and create awareness of how consumers benefit from using Gen AI tools.
- Incorporate robust built-in safeguards and guidelines that support ethical AI use, ensure regulatory compliance, and mitigate biases. This helps strengthen trust and reliability in AI-driven solutions.
- Collaborating with external Gen AI experts while investing in employee training internally can be an effective strategy. Our research finds that nearly half (46%) of organizations plan to work on Gen AI with external agencies or consultancies. There is currently a Gen AI marketing talent gap, with 63% of surveyed organizations anticipating that new job roles in marketing will emerge in the next few years.³⁵
- Three in five organizations acknowledge the need to improve data foundations to support Gen AI in

- achieving its full potential. Only 51% of data executives say that their organization has clear processes to manage siloed data and data integration across functions. Fewer than half (46%) have documented policies around sourcing, usage, access, processing, and security of data specifically for Gen AI.³⁶

As we look to the future, we are on the brink of a fascinating evolution in which personal AI agents become integral to our interactions. Imagine a world in which your AI agent seamlessly communicates with brand AI agents, creating a hyper-contextualized experience tailored just for you (e.g., gluten-free options). This shift moves us beyond the realm of social media into a new era where AI-driven interactions take center stage. To truly harness this potential, it is vital to deliver transformative, consumer-centric retail experiences with:

- **Evolving AI models:** Gen AI in retail often struggles with mediocrity due to limited training data and synthetic personas. This leads to low customer satisfaction, which is reflected in our survey results. Leverage simulation design and synthetic data to tailor personas by brand and geography to offer more personalized and geographically nuanced experiences, enhancing consumer satisfaction.
- **Anthropological insights:** Avoid conformity traps and spark human-centered creativity and innovation. Incorporate anthropological insights into

AI development to create richer, culturally adapted AI personas.

- **Hyper-contextualization:** Adapt conversations dynamically based on real-time context, offering personalized, relevant interactions. For example, Perplexity launched an AI-powered shopping assistant capable of researching products, providing recommendations, and completing purchases, streamlining online shopping by integrating Gen AI for personalized consumer experiences..
- **Multimodal AI:** integrate diverse data types to enable richer, immersive shopping experiences.
- **AI agents:** AI agents will offer personalized recommendations (e.g., gluten-free options) and collaborate with other agents and brands to enhance service quality.

In this exciting new landscape, the transition from SEO to GEO (Generative Engine Optimization) becomes crucial. Optimizing content for AI-driven search platforms will enhance visibility and engagement by focusing on personalization and conversational queries. Multimodal AI will enrich these experiences by integrating diverse data types, offering immersive shopping journeys. As consumer agents guide decision-making across all aspects of life, collaborating with retail agents will elevate service quality to unprecedented levels. Welcome to the future of consumer engagement - where what matters most is just a conversation away.

³⁵ Capgemini Research Institute, "Generative AI and the evolving role of marketing: A CMO's PLAYBOOK," December 2023.

³⁶ Capgemini Research Institute, Data-powered enterprises survey, April 2024, N = 500 organizations represented by 500 data executives and 500 business executives.

Use technology to boost resilience and sustainability, and lower prices

Automation: Brands and retailers are saving time and money by automating non-core activities, cutting non-essential products, and optimizing their product portfolios. For example:

Retailers are shifting to automation-driven operations, requiring staff to adapt to advanced technologies, from AI to robotics, to remain competitive and efficient in the evolving market. As digital retail grows, brands need to invest

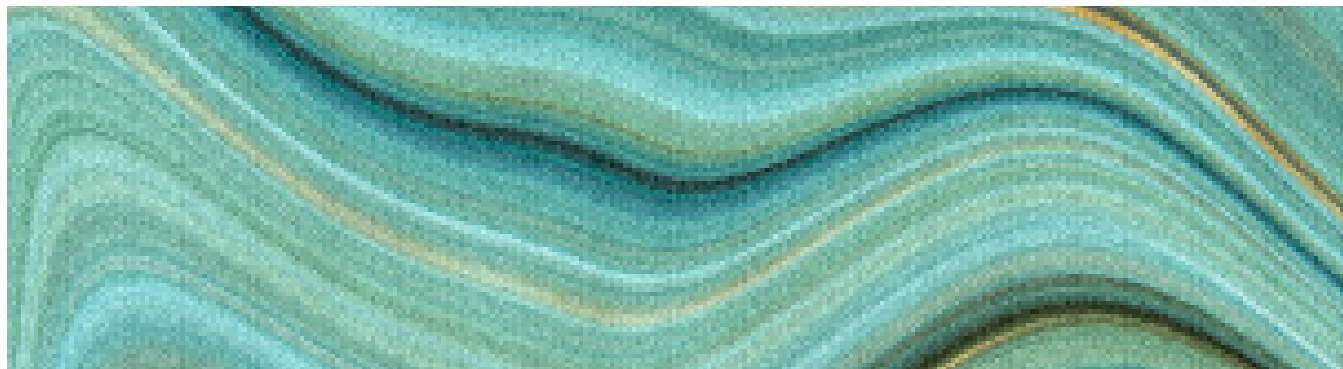
in upskilling their workforce, focusing on data analysis, e-commerce platforms, and customer engagement tools to meet the changing demands of consumers.

Sustainability: Sustainability efforts lower costs by reducing, reusing, or recycling waste, and conserving energy and water, using QR codes to reduce the need for paper and adopting circular-economy models. Brands and retailers are also increasingly focused on food waste.

Supply chain: Retailers and brands are increasingly focused on supply chain resilience by diversifying sourcing strategies, leveraging advanced technologies like AI for real-time tracking, and enhancing collaboration with suppliers to mitigate disruptions and ensure continuity.

Brands and retailers can achieve cost-efficiency and resilience by using data and analytics to enhance planning and fulfillment. Walmart opened its new high-tech perishable distribution center in Lancaster, Pennsylvania, which uses advanced robotics to process more than twice the volume of a traditional perishable facility. Data and analytics can help design efficient distribution and supplier networks, identify optimal fulfillment solutions, and meet supply chain goals cost-effectively by:

- Creating a distribution network for both e-commerce and physical commerce
- Recommending profitable product mixes for different channels, locations, and consumer personas
- Optimizing routes and logistics to reduce costs and emissions and ensure timely delivery
- Planning safety stock to manage costs and customer demand. For instance, US home improvement retailer The Home Depot opened four new distribution centers to cater to both traditional DIY customers and professionals tackling larger jobs.
- Supporting production decisions and resource allocation to meet customer expectations and control costs.





Unlock channel growth

Surprisingly, Gen AI influencers are challenging human influencers in terms of achieving high levels of consumer engagement

A recent example highlighting the influence of AI in consumer purchasing decisions is the increasing use of AI platforms such as ChatGPT for holiday shopping. Between July and September 2024, Gen AI traffic to online retailers increased tenfold,⁴⁰ indicating a significant shift in consumer behavior. Shoppers are turning to AI for tailored product recommendations and deal-finding, which poses a challenge to traditional search engines.

This trend underscores growing consumer trust in AI-driven recommendations. With Gen AI-driven content, brands can create AI influencers to close the gap between content

consumption and commerce. The highly personalized nature of AI influencers' advice resonates with consumers. A solid 42% of the Digital-First Trailblazers cluster make purchases based on AI influencers' recommendations. Lu do Magalu is the most-followed AI influencer on Instagram, with 7.1 million followers. Designed by Brazilian retail organization Magazine Luiza, Lu do Magalu has worked with Burger King, Red Bull, Adidas, Samsung, McDonald's, and many other high-profile brands. Another popular Brazilian-US AI influencer, Lil Miquela (2.6 million Instagram followers) has also worked with luxury brands, including Prada and Chanel, and currently brings in an estimated \$11 million annually.⁴¹

A significant 63% of consumers globally, 81% in the Digital-First Trailblazers cluster, and 73% in the Educated Rationalists cluster prefer to buy celebrity- and influencer-endorsed brands. It is important to note that the average age of the Digital-First Trailblazers is 37, while the average age of the Educated Rationalists is 56. However, the influence of celebrity-endorsed brands is high for both these age groups. Carefully tailoring the approach to different age groups is key to unlocking the power of influencers. In North America, for example, Adidas has seen a 60%⁴² year-on-year increase in visits to its Lionel Messi microsite and over a 40% rise in visits to the kids' soccer section.

³⁸ Chain Storage, "Walmart opens new high-tech perishable distribution center," July 2024.

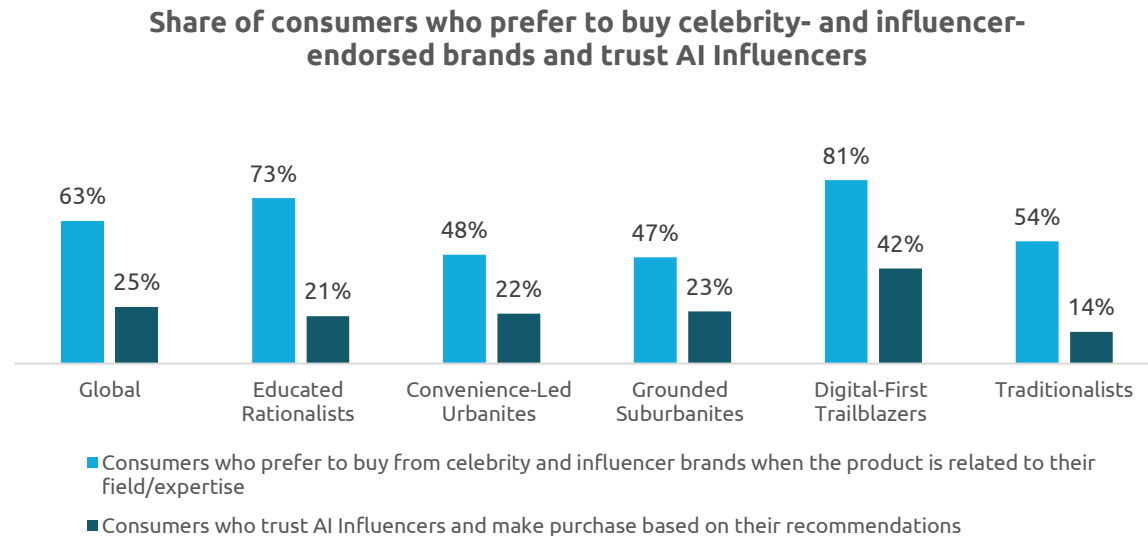
³⁹ MSN, "Home Depot to open four new distribution centres in 2024," March 2024

⁴⁰ Retail Technology Innovation Hub, "Black Friday 2024 goes down a storm in the UK as discount hungry Brits splurge £1.12 billion online," November 2024.

⁴¹ Adweek, "AI Influencers can now rep your brand. Should they?" November 2024.

Figure 49.

Consumer preferences for celebrity and (AI) influencers



Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers; Educated Rationalists cluster = 253 consumers; Convenience-Led Urbanites cluster = 371 consumers; Grounded Suburbanites cluster = 117 consumers; Digital-First Trailblazers cluster = 139 consumers; Traditionalists cluster = 120 consumers.

Leverage social and retail media networks as a key way to engage and influence early in the consumer journey

Gen AI, social media, and RMNs may not all benefit from the same approach. Our analysis shows that the Digital-First Trailblazers cluster uses Gen AI most frequently. However, most clusters pay attention to ads shown on retailer websites or apps. The Educated Rationalists and Digital-First Trailblazers clusters are social media savvy. Identifying key consumer segments based on their interactions and comfort levels with Gen AI tools, social media, and RMN is key to unlocking channel growth and utility.

The decline in satisfaction with generative AI underscores the need for retailers and brands to enhance their customer experience (CX) strategies. To adapt to new-age use cases, focus on personalized interactions, seamless omnichannel support, and engaging content. These elements will help meet the evolving expectations of customers who increasingly

⁴² SI, "Lionel Messi is fuelling Adidas soccer popularity in United States," June 2024.

rely on social media for product discovery, customer support, and shopping experiences.

E-commerce is surging, with social media emerging as key channels for product discovery and purchases, transforming consumer shopping habits. This is reshaping how consumers shop and engage with brands. Retailers and brands should leverage social media by optimizing content, using targeted ads, and integrating social commerce features. They can then engage with consumers where they spend the most time, driving visibility and sales.

Below are the new revenue streams for retailers and brands.

- **Retail Media Networks:** Sell ad space on your website, app, and stores to brands.
- **Data-driven Consumer Intelligence:** Sell customer data insights to other businesses, within GDPR boundaries.

Target the decision makers

Gen Alpha is currently responsible for over \$28 billion in direct spending and drives billions more in indirect spending. Even the youngest members of Gen Alpha influence purchase decisions.

Currently, more than one third (35%) of consumers who are the primary decision makers in their households about what products to purchase are Gen Z and Millennials. Moreover, Gen Alpha has more influence on the drivers of most shoppers. Focusing on digital engagement and personalized experiences to attract Gen Z and Millennials is essential. Leveraging social media and influencer marketing to capture Gen Alpha's influence on purchasing decisions will be helpful.

Enhance the in-store experience

In-store shopping is still the key shopping format for the majority of consumers and needs to meet consumer expectations in terms of technology interfaces and customer experience, as in the online formats. This can be achieved through:

- **AI-driven personalization:** Use AI to analyze customer preferences, offering tailored recommendations and personalized shopping experiences
- **Geolocation tools:** Employ geolocation technologies to attract and engage local customers by providing real-time promotions and tailored services
- **Smart space utilization:** Leverage digital solutions, like interactive displays and mobile apps, to optimize small retail spaces for improved navigation and product discovery
- **Experiential marketing:** Host events, workshops, pop-up shops, and VR experiences.
- **Seamless integration:** Balance digital and physical offerings to create immersive, tangible experiences while retaining convenience.
- **Repair services:** Offer extended warranties, repairs, and maintenance for recurring revenue. British multinational retailer Marks & Spencer (M&S) has partnered with clothing repair and alterations organization SOJO on a new initiative for customers.⁴⁴

Lead with purpose

A gap in education and trust still exists

Consumers are increasingly turning to vegan food and want to understand the nutritional impact of food. Educating consumers on health and sustainability metrics and, more importantly, gaining consumer trust by transparently providing this information is essential. A globally standardized scoring system would be a significant step forward. Beyond Meat, a US-based producer of plant-based meat substitutes, has launched its newest product, Beyond Sun Sausage, marking a significant shift from its current meat replacements. This new product focuses on wholesome fruits, vegetables, and legumes, reflecting the organization's response to growing consumer demand for clean-label ingredients.⁴⁵ Foods claiming to have a 'clean label' should be free of unsafe additives and ingredients, and from vague or misleading terminology that hides health risks or implies non-existent health benefits.⁴⁶

Global alliances and regulations also help educate consumers on food sustainability. In February 2024,

Amsterdam became the first EU capital to endorse the Plant Based Treaty, which aims to:

- Put food systems at the forefront of combating the climate crisis.
- Halt the widespread degradation of critical ecosystems caused by animal agriculture.
- Promote a shift toward healthier, sustainable plant-based diets.⁴⁷

The EU Commission has granted the Dutch government €700 million to help livestock farmers in ecologically sensitive areas to voluntarily close by October 2029 if they exceed nitrogen emission thresholds. The Netherlands leads in shifting away from animal agriculture. In 2024, Amsterdam became the first EU capital to endorse the Plant Based Treaty and in 2022, Haarlem became the first city globally to ban meat adverts in public spaces.⁴⁸

Transparent collaboration across partnerships is a key way forward to reduce food waste

An impressive 62% of consumers globally support brands that demonstrate transparent food-waste reduction practices, and 73% believe retailer policies and initiatives should help reduce food waste. Retailers have multiple areas in which to focus on reducing food waste, such as by:

- Enhancing transparency and efficiency in the supply chain to reduce waste and improve product freshness, using real-time data sharing and logistics optimization.
- Developing and implementing strategies for repurposing unsold food and engaging with the entire supply chain to identify and mitigate potential waste.
- Implementing strategies to encourage consumers to make more responsible and efficient purchasing and consumption choices through dynamic pricing, targeted promotions, and rewards.

Carrefour in France has extended its collaboration with Wasteless in Argentina, rolling out Wasteless AI across all 640 of its stores. This collaboration aims to drastically reduce food waste, lower markdown costs by 54%, and offer consumers fresh products at low prices. Wasteless AI's advanced AI-driven smart markdown technology supports dynamic discounting of perishable products, ensuring that they are sold at the optimal moment in their lifecycles.⁴⁹

⁴³ eMarketer, "Even the youngest members of Gen Alpha influence purchase decisions", August 2024.

⁴⁴ Retail-insight-network, "M&S introduces clothing repair service" July 2024.

⁴⁵ Vegconomist, "Beyond Meat unveils 'Beyond Sun Sausage' in bold move toward clean-label innovation," July 2024.

⁴⁶ Center for Science in the Public Interest, "Clean labels," accessed December 2024.

⁴⁷ <https://plantbasedtreaty.org/> accessed on 12th November 2024.

⁴⁸ Vegan FTA, "Dutch government will receive €700 million from the EU to close animal farms," September 2024.

⁴⁹ ESM, "Wasteless AI launches in 640 Carrefour stores in Argentina," October 2024.

Conclusion: Distinctive consumer trends in the Netherlands

The Dutch consumer landscape in 2024 exhibits some unique characteristics that set it apart from global trends. While global consumers are increasingly influenced by generative AI, social commerce, and sustainability concerns, Dutch consumers demonstrate a more balanced approach, prioritizing cost-efficiency, selective digital adoption, and practical sustainability choices.

Cost-of-living concerns and value-oriented behavior

Although concerns about the cost-of-living crisis have moderated, Dutch consumers remain highly price-conscious. 64% of shoppers visit multiple physical stores to compare prices (previously 56%), and 57% now spend more time searching for deals online (up from 54%). While global consumers are increasingly prioritizing convenience and speed, Dutch consumers still place strong emphasis on value over instant accessibility.

Private-label product adoption remains high, with 65% of consumers opting for private-label brands (up from 63%), a level significantly higher than the global average. Shrinkflation remains a major concern, with 73% of Millennials expecting clear alerts when product sizes decrease without adoption of generative AI in shopping.

Globally, generative AI continues to expand, and the Netherlands is catching up, with 27% of consumers using AI in shopping, more than doubling from 13% last year. However, the enthusiasm for AI remains mixed, with satisfaction levels declining in areas like tailored recommendations and loyalty program personalization.

60% of global consumers have replaced traditional search engines with AI-driven tools, yet Dutch consumers remain more cautious and reliant on conventional search methods.

The role of social commerce and influencers

Social commerce continues to rise, though its impact in the Netherlands remains more moderate than in global markets. 31% of Dutch consumers discovered a new product via social media in the last six months (previously 13%), and 16% proceeded with a purchase (up from 8%).

Influencer-driven purchasing is also on the rise, particularly among Gen Z, with 60% purchasing through social media (up from 34%). However, Dutch engagement with influencers remains below the global benchmark of 66%, reflecting a more cautious and selective approach to social commerce.

Sustainability: a divisive consumer priority

Sustainability remains a key concern for Dutch consumers, but its importance varies significantly across different consumer groups. 68% of Dutch consumers purchase products from sustainable organizations (vs. 64% of consumers globally), particularly Gen Z (81%) and Millennials (79%), who stand out as sustainability-driven consumers.

However, willingness to pay a premium for sustainability is declining: 39% of consumers do pay a 1-5% premium in 2024 (up from 18% in 2023), but only 36% are willing to pay 10% or more (down from 41% in 2023). This shows consumers are shifting toward lower-premium sustainable products.

Interest in carbon labeling, sustainable packaging, and food waste reduction initiatives has grown, but Dutch consumers increasingly seek affordable sustainability rather than premium-priced eco-friendly options. Compared to the global landscape, where sustainability concerns are rising across all consumer segments, the Dutch market presents a more polarized view.

In-store experience and delivery expectations

Unlike the growing global demand for ultra-fast commerce, Dutch consumers continue to value physical retail engagement. While digital shopping has increased, 60% of Dutch consumers still prefer in-store experiences.

However, Dutch consumers now expect faster and more reliable delivery options. The demand for same-day delivery has increased to 60% (previously 57%), and willingness to pay for 2-hour delivery has grown to 9% of order value (up from 5%). This presents an opportunity for retailers to balance in-store shopping experiences with efficient fulfillment services.

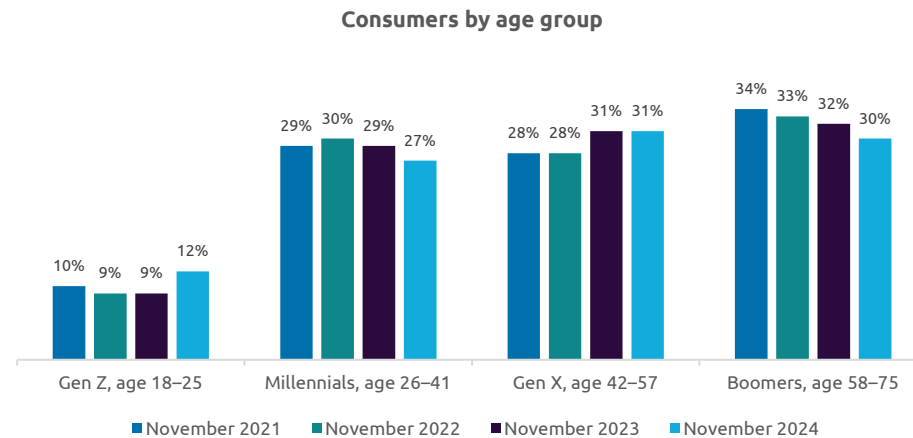
Final remarks

The Dutch consumer market presents a unique blend of traditional retail engagement, cautious technological adoption, and selective sustainability prioritization. Unlike the global market, where digital and AI-driven experiences are rapidly reshaping consumer habits, Dutch consumers maintain a more measured approach, prioritizing trust, affordability, and practicality over impulsive digital-first behaviors.

Research methodology

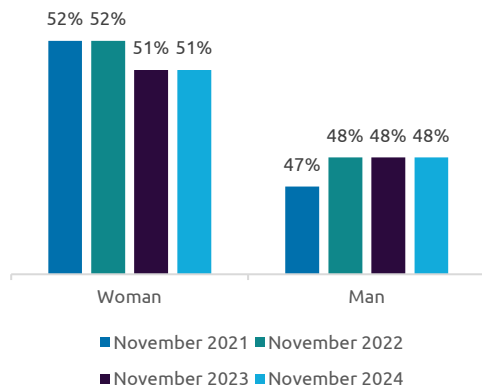
We surveyed 12,000 consumers over the age of 18 in 12 countries across North America, Europe, and Asia-Pacific in October and November 2024. Specifically in the Netherlands, we surveyed 1,000 consumers. The demographic details of the Dutch consumers surveyed are below.

Consumers by age group



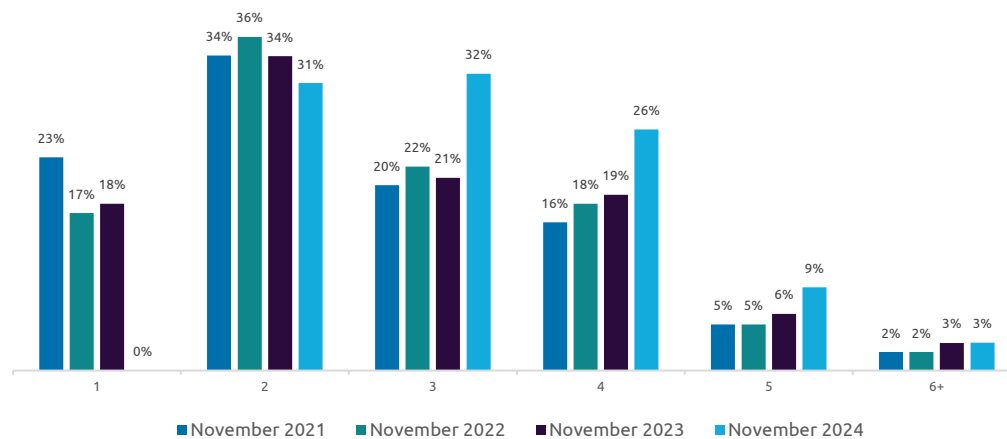
Consumers by gender identity

Consumers by gender identity

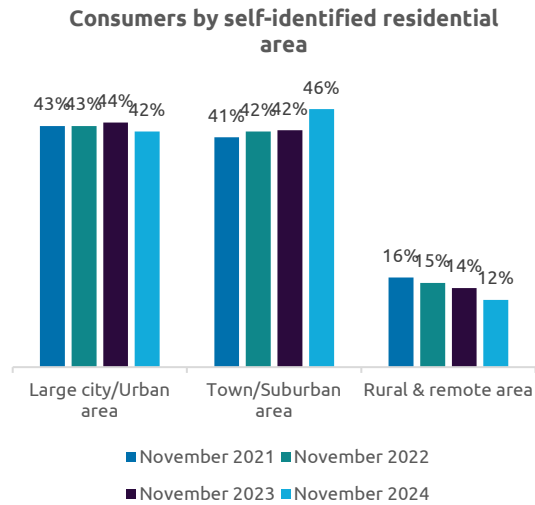


Consumers by number of people in household

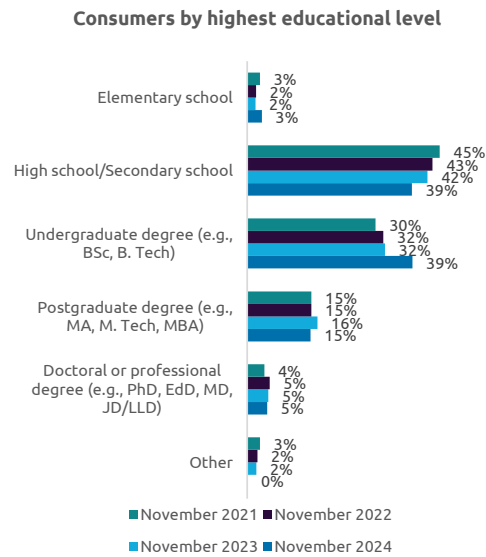
Consumers by number of people in household



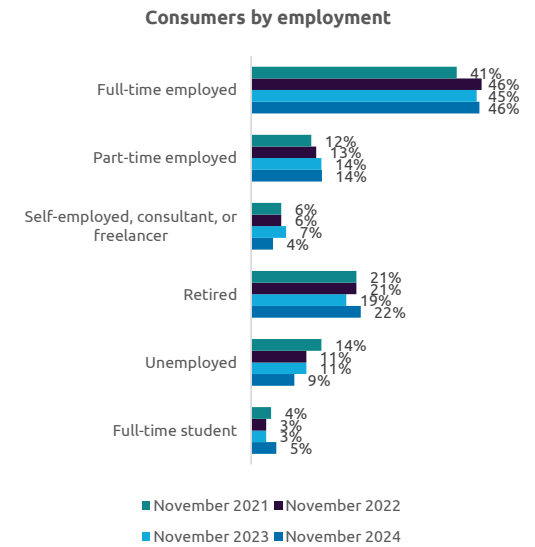
Consumers by self-identified residential area



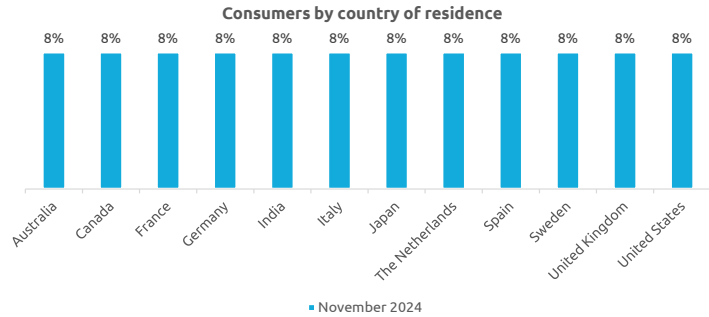
Consumers by highest educational level



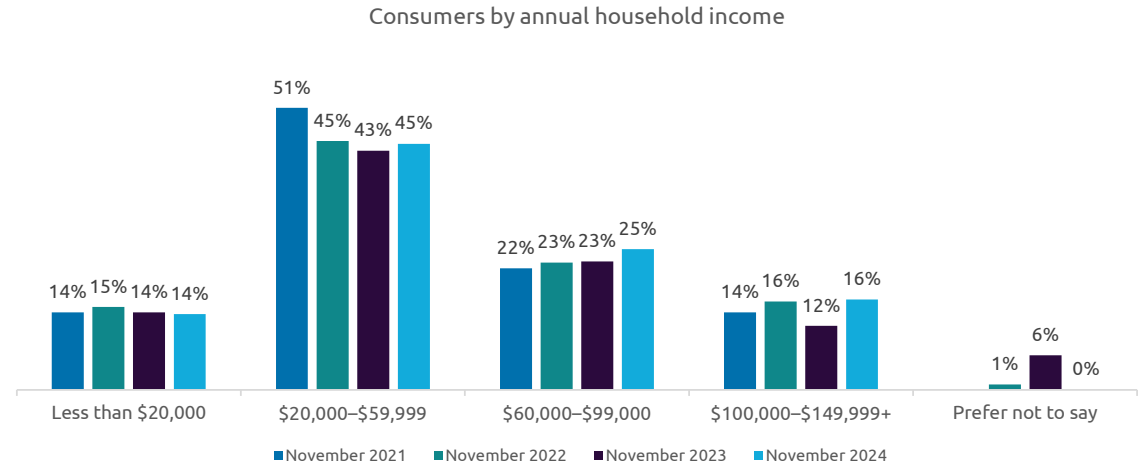
Consumers by employment



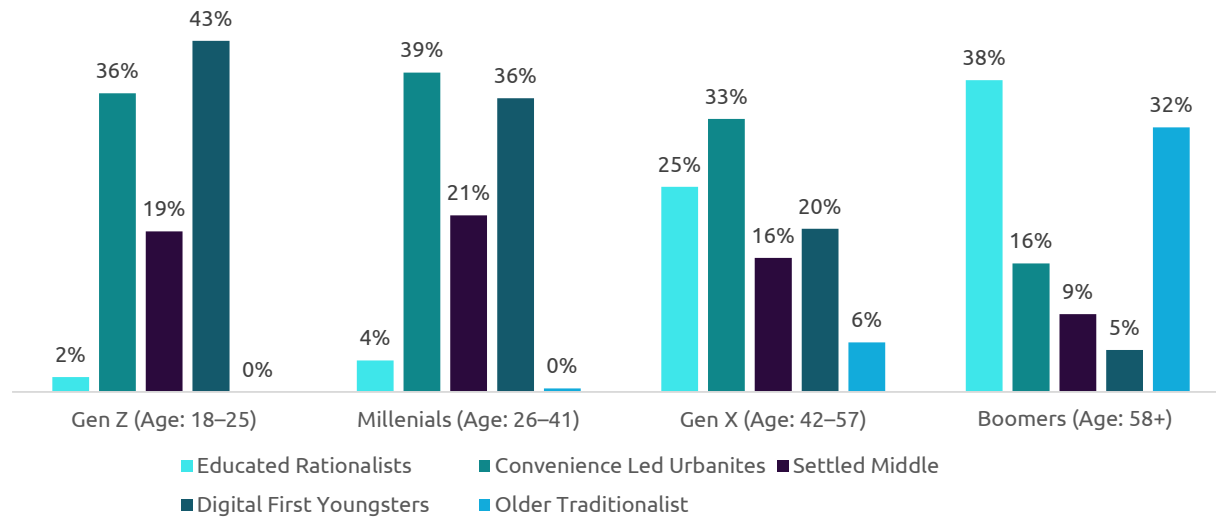
Consumers by country of residence



Consumers by annual household income



Cluster segmentation by age



Sources: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 12,000 consumers; Capgemini Research Institute, What matters to today's consumer, January 2024, N = 11,681 consumers; Capgemini Research Institute, What matters to today's consumer, January 2023, N = 11,300 consumers; Capgemini Research Institute, What matters to today's consumer, January 2022, N = 10,179 consumers.

*The study findings reflect the views of the respondents to our online questionnaire for this research and are intended to provide directional guidance.

Source: Capgemini Research Institute, Consumer Demand survey, October–November 2024, N = 1,000 consumers; Educated Rationalists cluster = 253 consumers; Convenience-Led Urbanites cluster = 371 consumers; Grounded Suburbanites cluster = 117 consumers; Digital-First Trailblazers cluster = 139 consumers; Traditionalists cluster = 120 consumers.



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Capgemini is a global business and technology transformation partner, helping organizations to accelerate their dual transition to a digital and sustainable world, while creating tangible impact for enterprises and society. It is a responsible and diverse group of 340,000 team members in more than 50 countries. With its strong over 55-year heritage, Capgemini is trusted by its clients to unlock the value of technology to address the entire breadth of their business needs. It delivers end-to-end services and solutions leveraging strengths from strategy and design to engineering, all fueled by its market leading capabilities in AI, cloud and data, combined with its deep industry expertise and partner ecosystem. The Group reported 2023 global revenues of €22.5 billion.

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