

What matters to today's consumer: 2025

Key findings and actionable insights for brands and retailers



A rapidly changing market, advancing technology enablers, and evolving consumer expectations has created a perfect storm of opportunity for retailers and brands in 2025.

But with so much change happening at once, how can brands and retailers know where to focus their efforts to drive impact? The answer is by understanding what truly matters to today's consumer.

This is the rationale and purpose of our annual consumer research, aptly named *What matters to today's consumer*. Now in its fourth edition, our global survey of 12,000 shoppers helps brands and retailers understand consumer priorities and preferences, and connect their strategies to meet evolving needs and behaviors.

In this report summary, we present actionable takeaways and strategies to help brands and retailers respond to the tectonic shifts in the market, tech landscape, and consumer mindset. To access the full report and survey results, download the report [here](#).

1. Unlock channel growth



2025 is the year when science fiction becomes shopping reality: Gen AI tools are replacing search engines; social media platforms are shifting from interaction hubs to transaction powerhouses; and influencers—ordinary people in almost every conceivable way—have incredible reach and sway.

In this landscape, brands and retailers must acknowledge the blurring line between browsing and buying, and take steps to make it as easy as possible to purchase in any channel. The so-called “pre-shop” isn’t just where interest is sparked, it’s where buying decisions are made and loyalty is built.

Despite the continuing rise of social media personalities, our research reveals that retailers and brands still hold incredible power to influence the shopper journey. In fact, our research suggests that

consumers welcome more input from retailers and brands themselves, with more than half (53%) saying they want personalized in-store ads and more than two-thirds saying they notice ads on retailer website/apps when they search for a product.

The common denominator between winning the pre-shop and successfully executing ads via in-store or online retail media networks is data-driven personalization. Whether companies are creating social campaigns, incorporating recommendations into Gen AI results, or serving up retail media network ads, retailers and brands must tap the power of their data to demonstrate that they know the customer from past purchases and can meet their future needs on an individual level.

Key takeaways

1. Win the pre-shop

As the line between browse and buy continues to blur, retailers and brands need to make it as easy as possible for consumers to purchase in the channel of their choosing.

2. Become the influencer

Retail media networks are an effective way of reaching consumers and influencing purchases with relevant and personalized ads.

3. Lead with data

Leverage insights to provide the foundation for all activity and inform every customer interaction.

4. Act fast

Consumer behaviors are evolving faster than retailers' capabilities and investments. Companies must take immediate action to close the gap.



53%

Gen Z and 45% millennial shoppers purchased products via social media



70%

of social media shoppers seek advice from influencers, up from 50% last year



58%

replaced traditional search engines with Gen AI tools, an 86% increase from 2023



67%

notice ads on retailer websites and apps when searching for a product

2. Adapt to compete



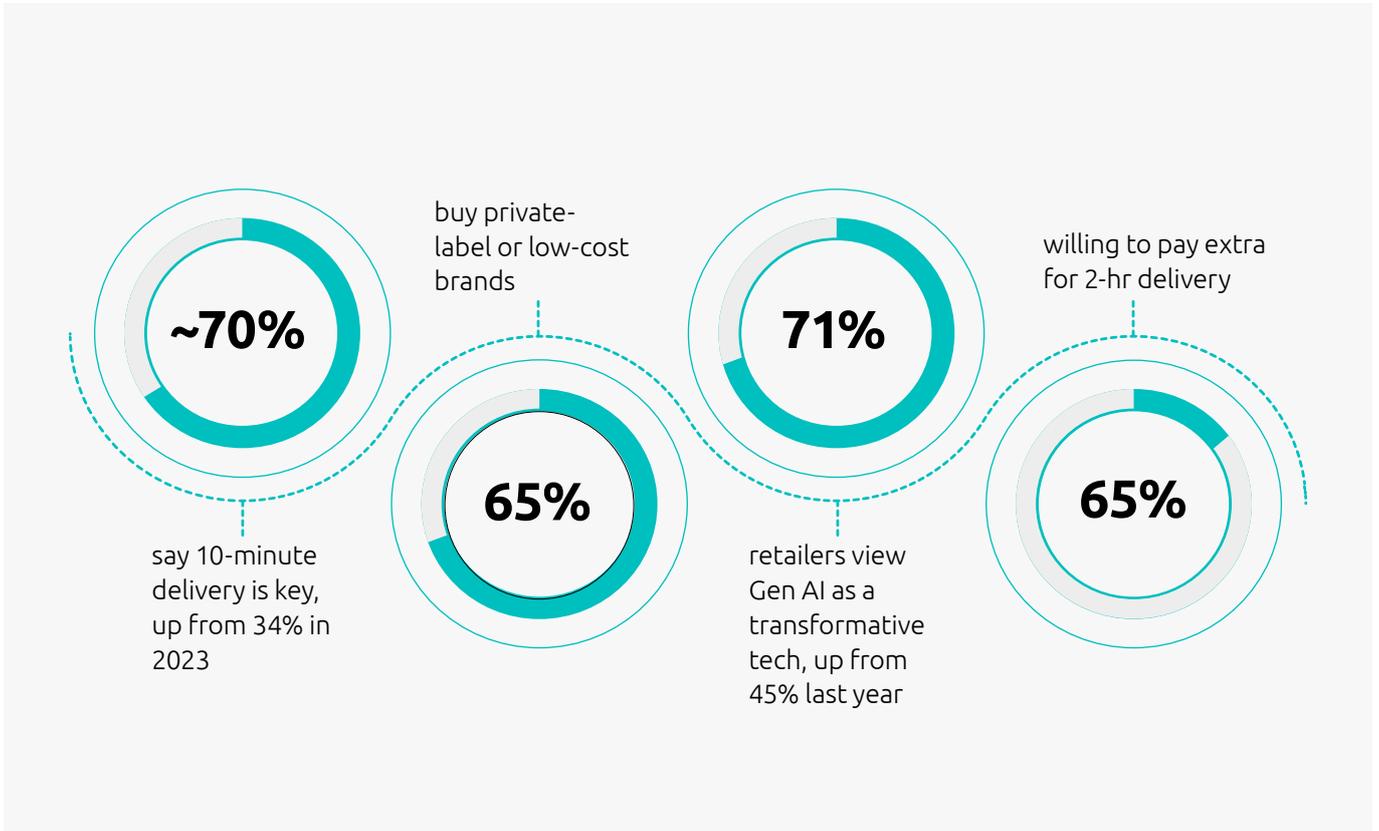
Let us be the bearer of good news: Consumers are less worried about their financial situation in 2025 than they were in previous years. But as with many businesses, they remain cautious about spending. We see the emergence of a more deliberate and conscientious consumer most clearly with the rise of private-label and low-cost brands.

At the same time, our research reveals that consumers are placing a premium on convenience, with a strong majority valuing 10-minute and two hour-delivery, as well as a higher willingness to pay for the service, albeit not enough for retailers to break even or turn a profit.

This disconnect highlights a persistent need for retailers and brands to take cost out of operations. At the same time, they also need to consider the supply chain not just as a back office cost out capability, but as a customer experience driver. Put another way, enhancements in the supply chain shouldn't just lower operating expenses, but also differentiate the brand and establish a strategic advantage.

Technology, particularly generative AI, is emerging as a powerful tool to create value by both reducing costs and also driving experience enhancements. For example, in our report, we highlighted how Amazon is using AI tools to enable real-time vehicle routing that adapts to traffic, load weight, and customer requests. Zara, meanwhile, is leveraging AI-driven algorithms to identify trends to predict popular styles, which, in turn, is enabling them to shrink design and production timelines.

As retail leaders wade deeper into AI waters, we must be careful not to overlook other, potentially less expensive and more accessible technologies. The cost of RFID, for example, has fallen dramatically, making it a practical solution to help with inventory management and production planning on low-ticket products, like fresh deli items or household goods. Other technologies, including computer vision and sensors, offer retailers a viable way to lower labor costs, improve productivity, and reduce shrink and waste.



Key takeaways

1. Start with a problem

Use AI to solve a specific challenge that will bring value to the business.

2. Choose wisely

Consider the full spectrum of technologies and select the solution that balances cost, complexity and results.

3. Double dip

Consider how technology solutions can not only take cost out, but also enhance the experience and differentiate the brand.

3. Lead with purpose



Our research underscored consumers' consistent interest in supporting brands and retailers that align with their personal ethics and values on issues like sustainability, fair trade, equality, social justice, health and nutrition.

As these issues continue to influence consumer choice, retailers and brands must set business goals that relate to their own performance, as well as health of the planet and society. At Capgemini, we call this two-pronged approach [Business for Planet](#) and it's a guiding principle of every client engagement and internal program.

The rise of the conscious consumer is manifesting

in different ways. For example, in our report we highlighted how Carrefour is using dynamic pricing to reduce food waste. Anecdotally, this is an initiative that is being adopted among other leading grocers, making a food waste strategy an imperative more than an option.

Beyond grocery, we're seeing the push to a more circular economy with retailers like IKEA that are rolling out upcycling programs that create a secondary market for used furniture. Even on the luxury side, major brands and fashion houses are acknowledging that second hand is becoming the first choice for many consumers.

64%

purchased products from organizations perceived to be sustainable

67%

see lack of sustainability as a reason to switch retailers

62%

support brands that demonstrate transparent food-waste reduction practices

38%

willing to pay up to 5% more for sustainable products

Key takeaways

1. Champion the change

Consumers favor retailers and brands that share their values when it comes to key social and environmental issues.

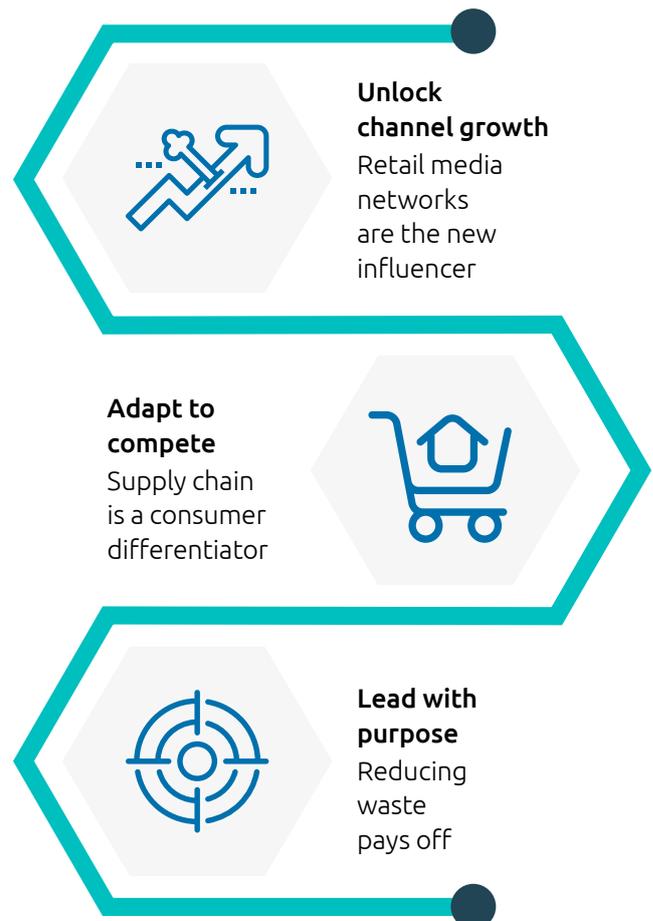
2. Become the influencer

Retailers and brands can drive value for the business through programs that advance the health of society and the planet.

3. Communicate the value

Consumers are looking to brands and retailers to help them understand complex environmental and health issues and articulate how to support real and meaningful change.

Editor's pick: Top three takeaways from our retail lead Lindsey Mazza



Conclusion

In 2025, it's not enough for brands and retailers to sell products. They need to create experiences—experiences that match expectations, build trust and loyalty, and meet the needs of the market.

In this landscape, brands and retailers need to meet consumers wherever they are, whether that's on TikTok or a virtual fitting room, a physical store or

the metaverse—and use consumer preferences and behaviors as cues to evolve the business.

The mandate for retailers and brands isn't just to adapt to change, but drive it based on a deep and complete understanding of who the consumer is and what matters to them today.

About the research

What matters to today's consumer (2025), is an annual research report published by the Capgemini Research Institute (CRI) that tracks and analyzes evolving purchasing patterns and preferences based on a global survey of over 12,000 consumers aged 18+ across 11 countries in North America, Europe, and Asia-Pacific.

Now in its fourth edition, this report explores seven key trends within the consumer products and retail industry: the impact of Generative AI on the shopper experience; consumers' growing preference for sustainable products and changing food habits; the

ongoing cost-of-living crisis; how social commerce is reshaping consumer behavior; the rise of personalized advertising powered by retail media networks; the criticality of delivery and fulfillment; and what drives consumers to switch brands. The report also offers practical and actionable insights for how retailers and consumer brands can adapt, evolve, and excel to capitalize on these trends and meet the needs of today's shoppers.

For more information and insights, download the free report [here](#).



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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, generative AI, cloud and data, combined with its deep industry expertise and partner ecosystem. The Group reported 2024 global revenues of €22.1 billion.

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