



RETAIL

THE ERA
OF THOUGHTFUL
COMMERCE

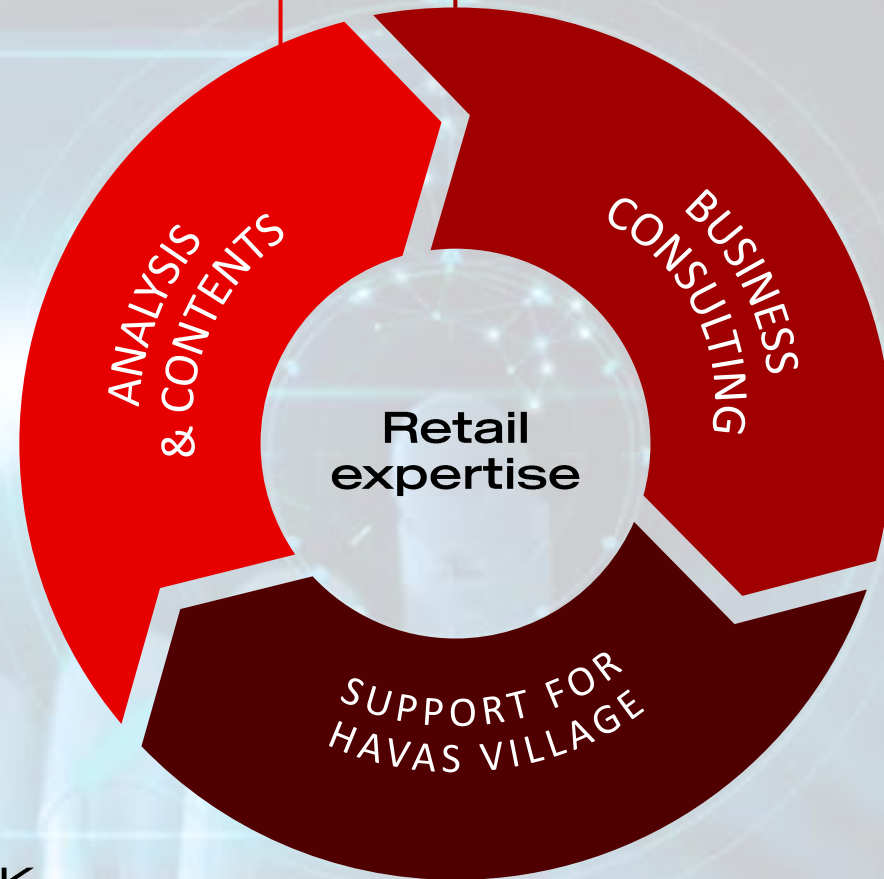
HAVAS
Commerce

HAVAS Commerce

3 missions

MARKET RESEARCH
MONTHLY NEWSLETTERS
THEMATICS BOOKS

STRATEGIC
CONSULTING

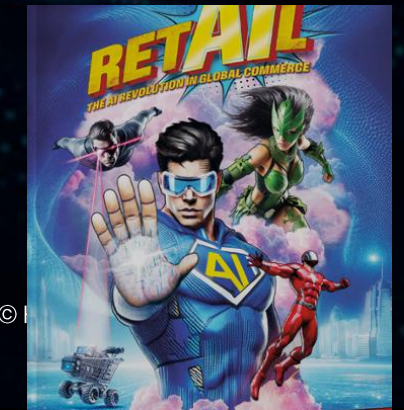
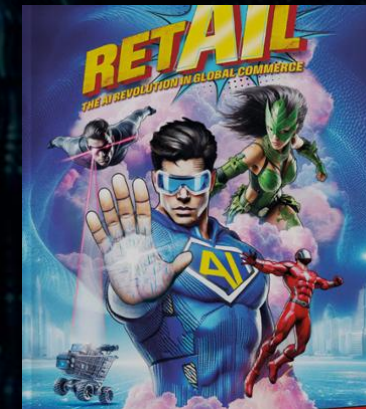


BENCHMARK
RETAIL MARKET RESEARCH
KNOWLEDGE

Havas Commerce Thematic books

Luxury 3.0
Indian Retail
Retail trends
Luxury in India

The new discount
AI in retail
Second hand



01

Methodology

Methodology



A sample of 500 retail professionals was surveyed across 17 countries, including *India, Brazil, China, France, Germany, Italy, Japan, Netherlands, Poland, Portugal, Spain, Belgium, UK, US, Greece, Mexico and UAE.*



The sample was surveyed online using a CAWI (Computer Assisted Web Interview) system.



Data was collected between November 21th and January 8th, 2026.

Sample profile

Business model

	%
Brick & Mortar	16
Pure e-commerce player	11
Click & Mortar	15
Marketplace Operator	5
Sales via third-party Marketplace	13
Direct-to-consumer	23
Subscription Commerce	3
Dominant Social Commerce	6
Hyper-personalized retail (driven by AI)	8



Company size

	%
1 to 10 people	10
11 to 30 people	3
31 to 100 people	5
De 101 to 500 people	27
De 501 to 5000 people	37
5001 and above	18



Position

	%
Owner / Partner	14
Senior Management	29
Middle Management	34
Frontline Management	24



02



Results

A STRATEGIC FRAMEWORK BUILT ON FOUR KEY DIMENSIONS



**Agility &
Performance
amidst economic
uncertainty**



**Next-gen
infrastructure
securing digital
assets & capital**



**Operational
excellence from
flow optimization
to bottom-line
results**



**The future of retail
toward an
economy of
autonomy & trust**



**Agility & Performance
amidst economic
uncertainty**

Navigating economic resilience and technological urgency: inflation and cybersecurity now dictate the global retail agenda.

The international context



Base: Retail executives (501)

Q9. What situation do you find the most concerning in today's international context?

Global retail pivots toward a « tech-first» model focused on AI efficiency and logistical agility.

Key levers in a tense global context



Base: Retail executives (501)
Q13: How do you plan to react to the current context?

Implementation and reinforcement of company measures



Base: Retail executives (501)
Q23: In recent months, have you implemented or strengthened the following measures for your business?

Emerging markets take the lead in AI-Driven efficiency

Key levers in a tense global context - Strategic focus: AI for cost optimization



Base: Retail executives (501)
Q13: How do you plan to react to the current context?

Retailers speak, 3 out of 4 observe a decline in purchasing power and a profound mutation in consumer behavior.

Decline in purchasing power



Base: Retail executives (501)
Q14: In your opinion, has consumers' purchasing power decreased?

Major shifts in consumer behaviour



Base: Retail executives (501)
Q15: Over the last 12 months, have you noticed any major changes in your consumers' behavior?

From emotional attachment to budget optimization driven by extreme caution and systematic deal-hunting, the consumer-brand relationship is being redefined by financial pragmatism.

Types of changes in customers' purchasing behaviour



Base: Retail executives (501)
 Q17: Beyond the decision-making process, what types of changes have you observed in your customers' purchasing habits and budget adaptation?

In-store traffic



Base: Retail executives (510)
 Q19: Would you say they are going to stores...?

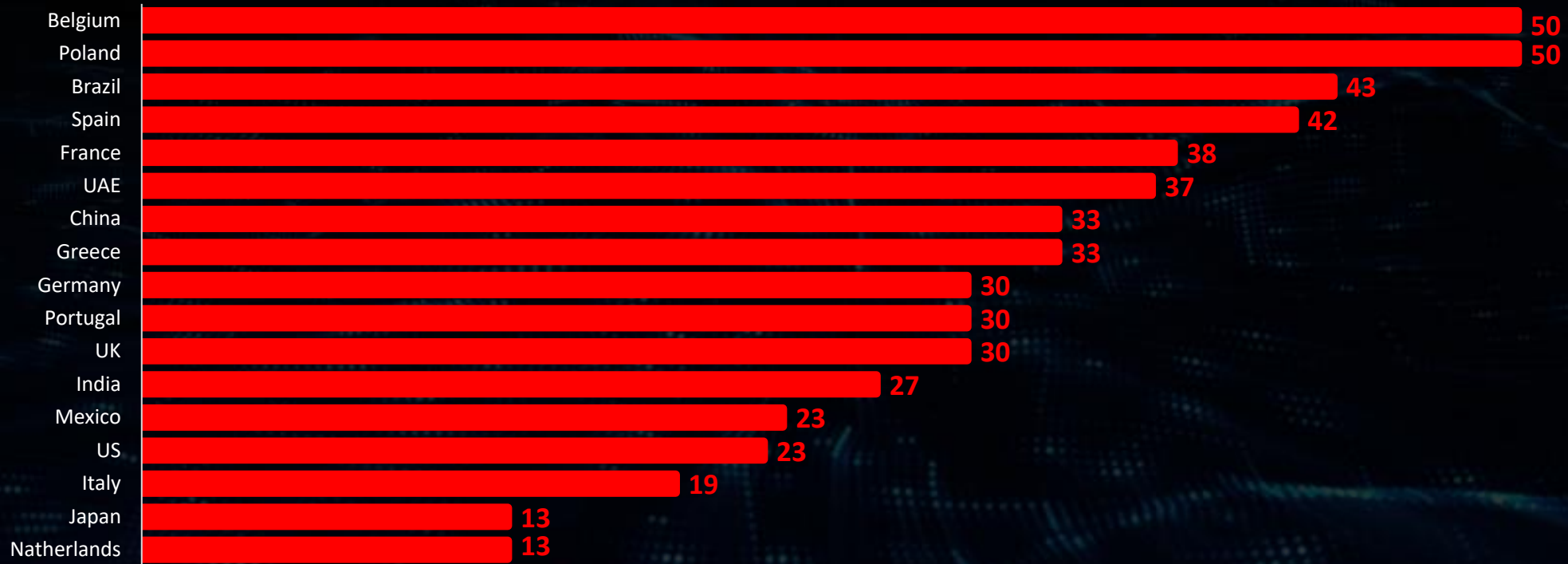
Repositioning of the product range



Base: Retail executives (501)
 Q21: Has the range of products you distribute changed?

A promotional dependence on the « strategic customer » that challenges traditional margins

Types of changes in customers' purchasing behaviour - Strategic Focus: Systematic waiting for sales and discounts



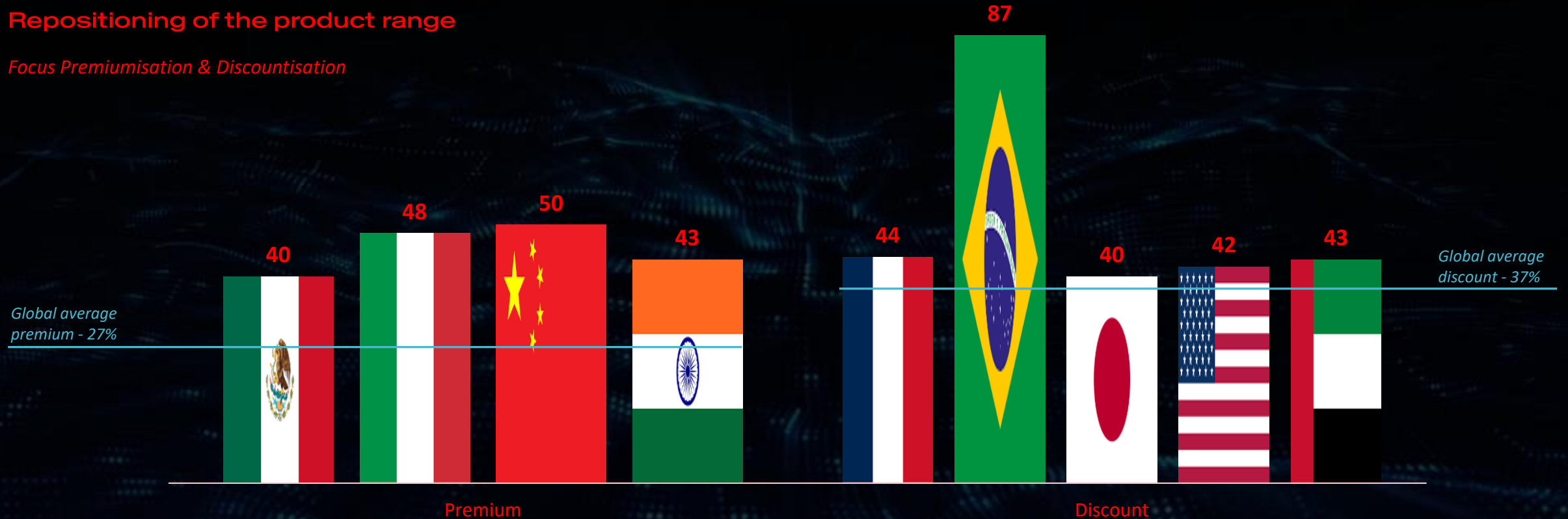
Base: Retail executives (501)

Q17: Beyond the decision-making process, what types of changes have you observed in your customers' purchasing habits and budget adaptation?

The 2026 consumer has abandoned impulse. Every purchase is now a choice between cost-efficiency and high-value performance.

Repositioning of the product range

Focus Premiumisation & Discountisation



Base: Retail executives (501)

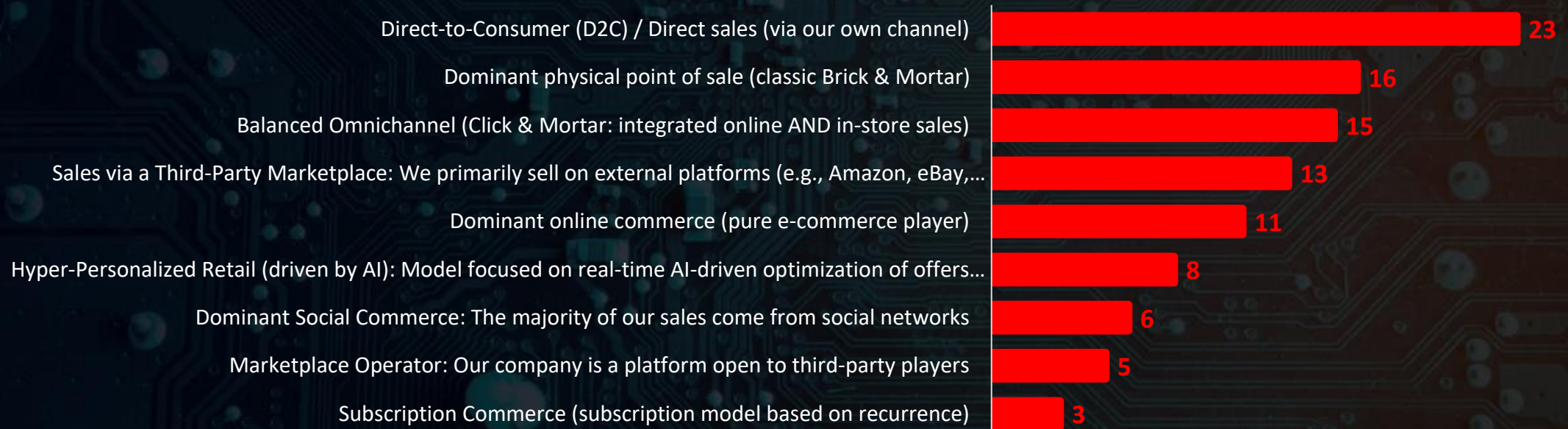
Q21: Has the range of products you distribute changed?



**Next-gen
infrastructure
securing digital
assets & capital**

Direct-to-Consumer (23%) is emerging as the dominant model to counter the decline of traditional physical retail.

Retailers' business models

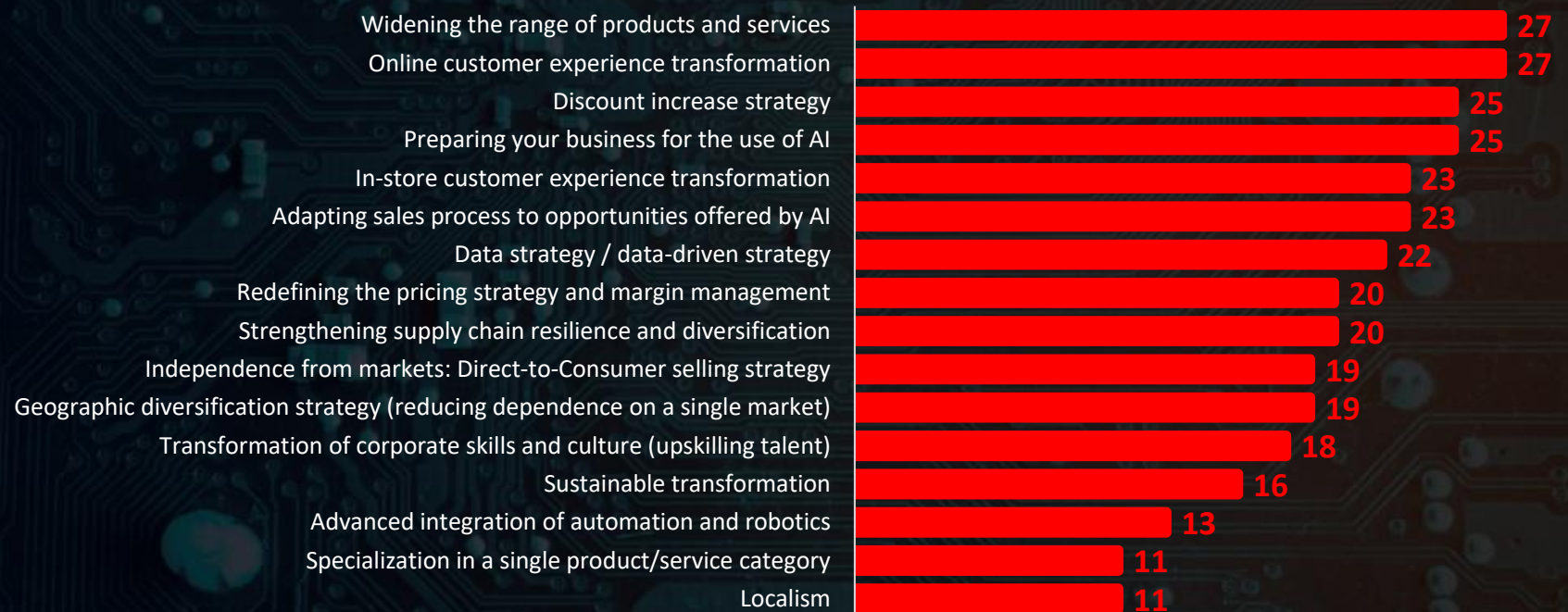


Base: Retail executives (501)

Q24: Which business model corresponds best to your company's main source of revenue?

The industry is shifting from crisis management to structural reinvention, where technological power meets human values.

Fundamental transformations



Base: Retail executives (501)

Q25: Which type of transformation seems most fundamental to your company today?

Digital leadership and product evolution are the primary growth drivers, supported by a significant shift toward massive AI upskilling.

Budget reallocation

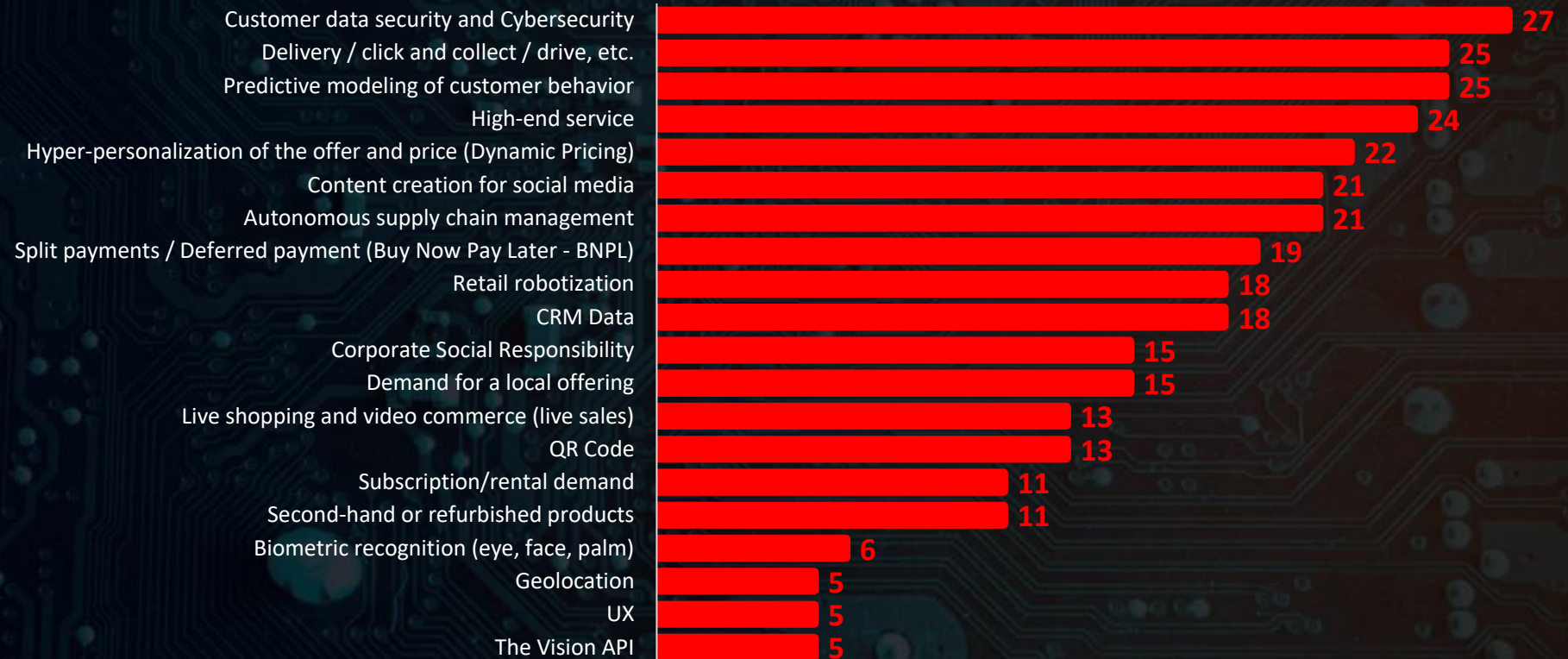


Base: Retail executives (501)

Q26: In the future, will you reorient your budgets towards...

The future of retail is built on algorithmic mastery of the customer journey and logistical resilience.

Emerging trends

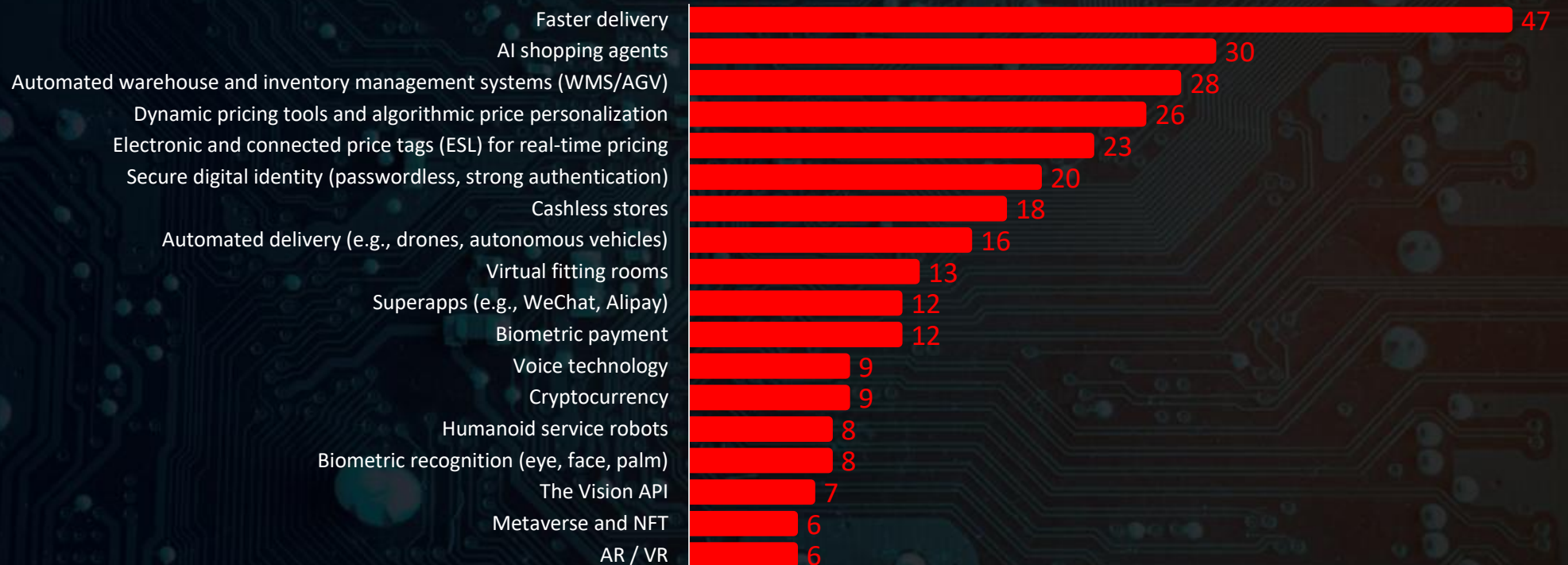


Base: Retail executives (501)

Q27: In your opinion, what trends or models will redefine the future of your company?


Retail innovation is defined by « economic realism ».The industry is moving away from the « spectacular » to focus on what actually drives conversion and protects margins.

Promising technical innovations



Base: Retail executives (501)

Q28: Which technical innovations are the most promising for your company?

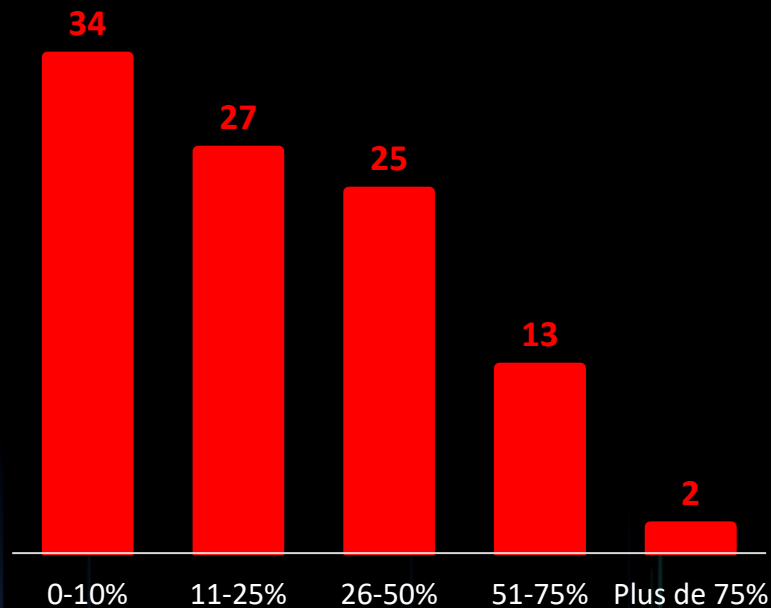


**Operational
excellence from
flow optimization to
bottom-line results**



The industry has integrated AI, but operational core remains untapped

Integration of AI into business processes



Base: Retail executives (501)
Q29: What percentage of your business processes already integrate AI?

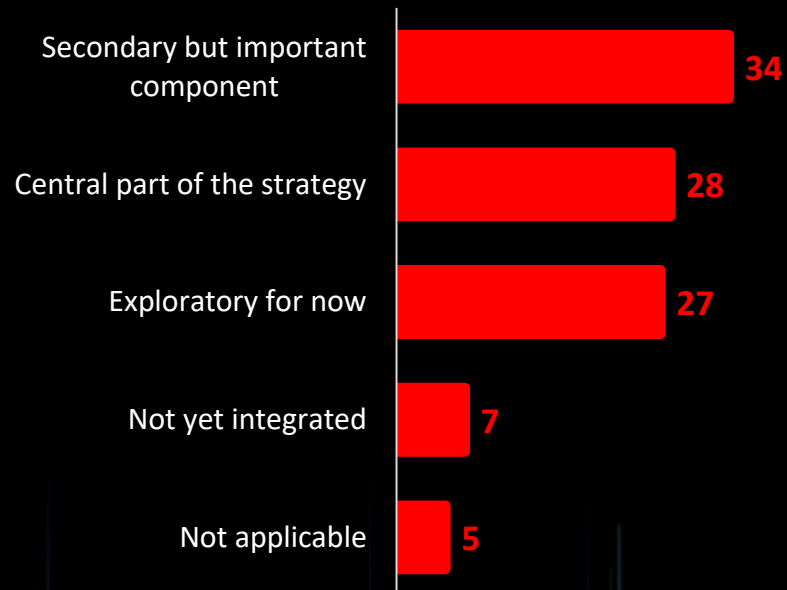
AI solutions already in place



Base: Retail executives (501)
Q30: What are the main AI applications you use?

The central role of AI in current strategies is reinforced by its proven ability to drive profitability through time and cost savings

AI integration within the global digital transformation strategy



Base: Retail executives (501)
Q31: How does AI integrate into your overall digital transformation strategy?

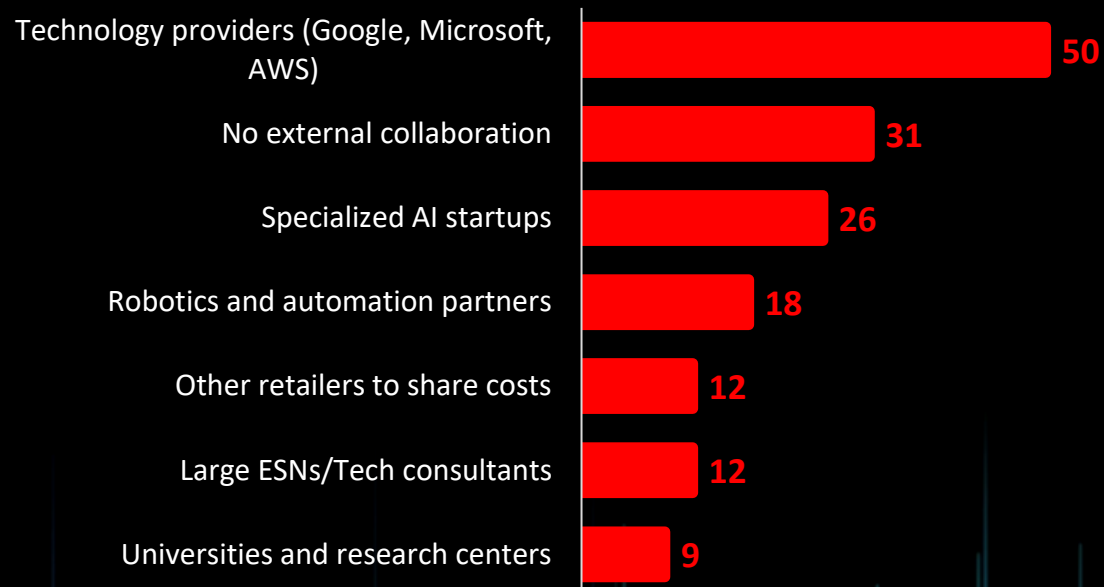
Benefits of using AI



Base: Retail executives (501)
Q34: What are the main benefits you have observed from using AI?

Strategic reliance on Cloud giants and the rise of logistics automation as the new standard.

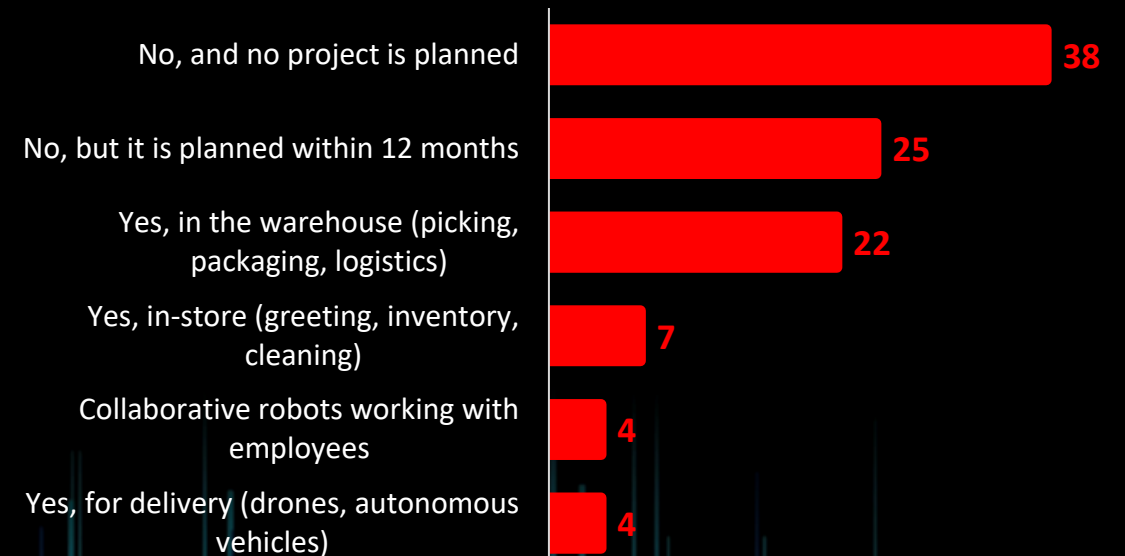
External partners for AI projects



Base: Retail executives (501)

Q32: Do you collaborate with external partners for your AI projects?

Application of physical robots

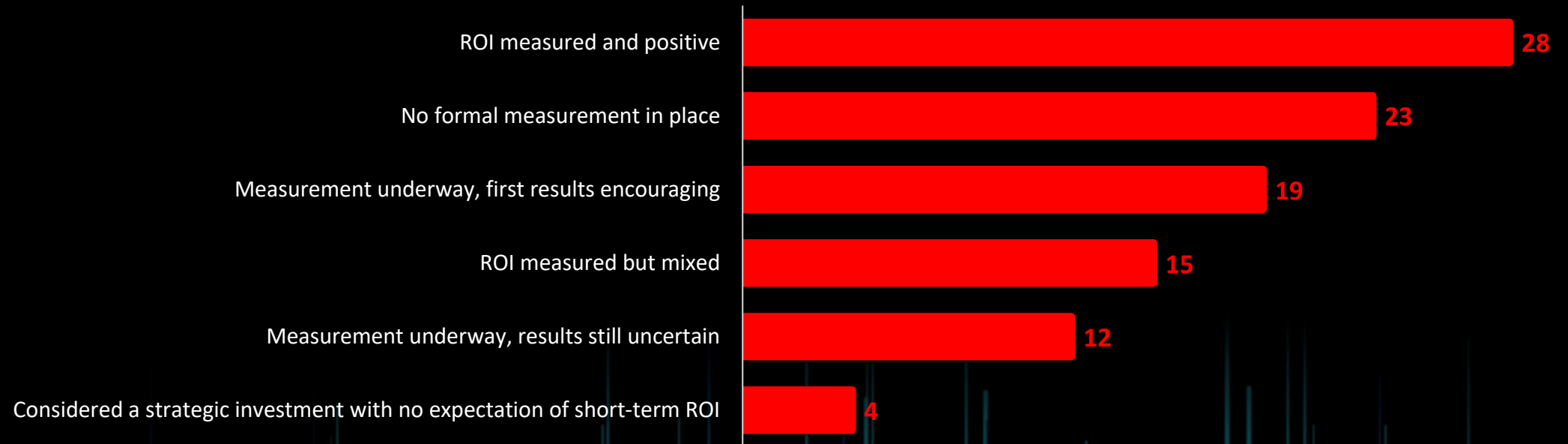


Base: Retail executives (501)

Q33: Do you use physical robots in your operations?

AI has moved beyond the hype, proving its worth as a performance engine that delivers measurable financial impact.

Integration of ROI in AI projects

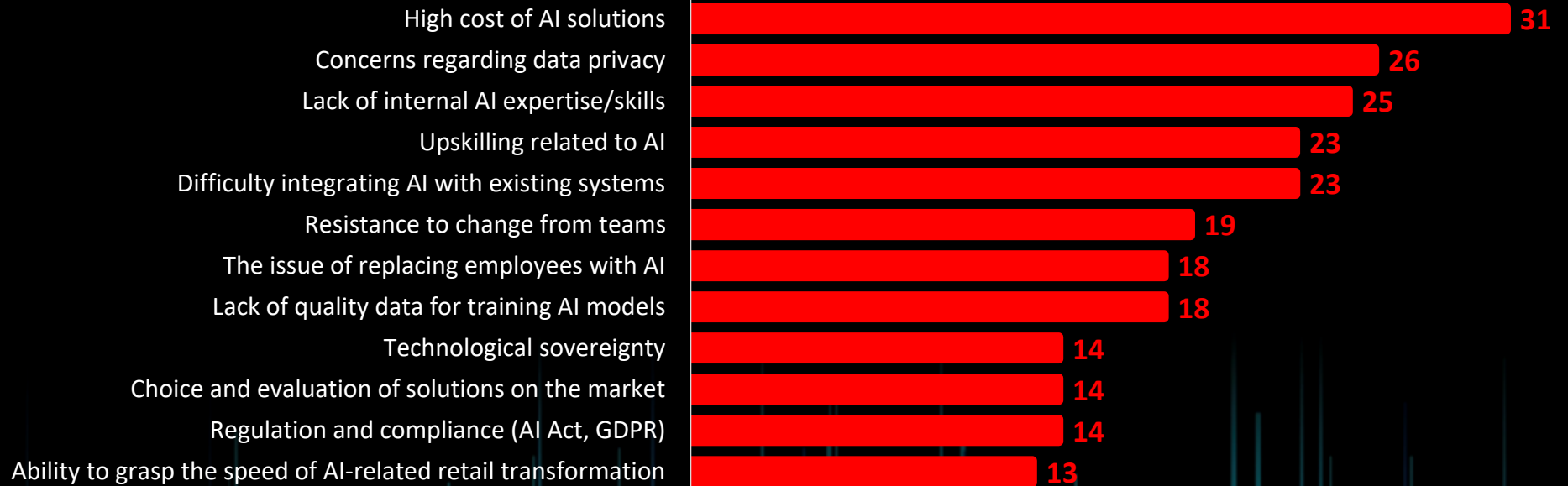


Base: Retail executives (501)

Q35: Do you measure the Return on Investment (ROI) of your AI projects?

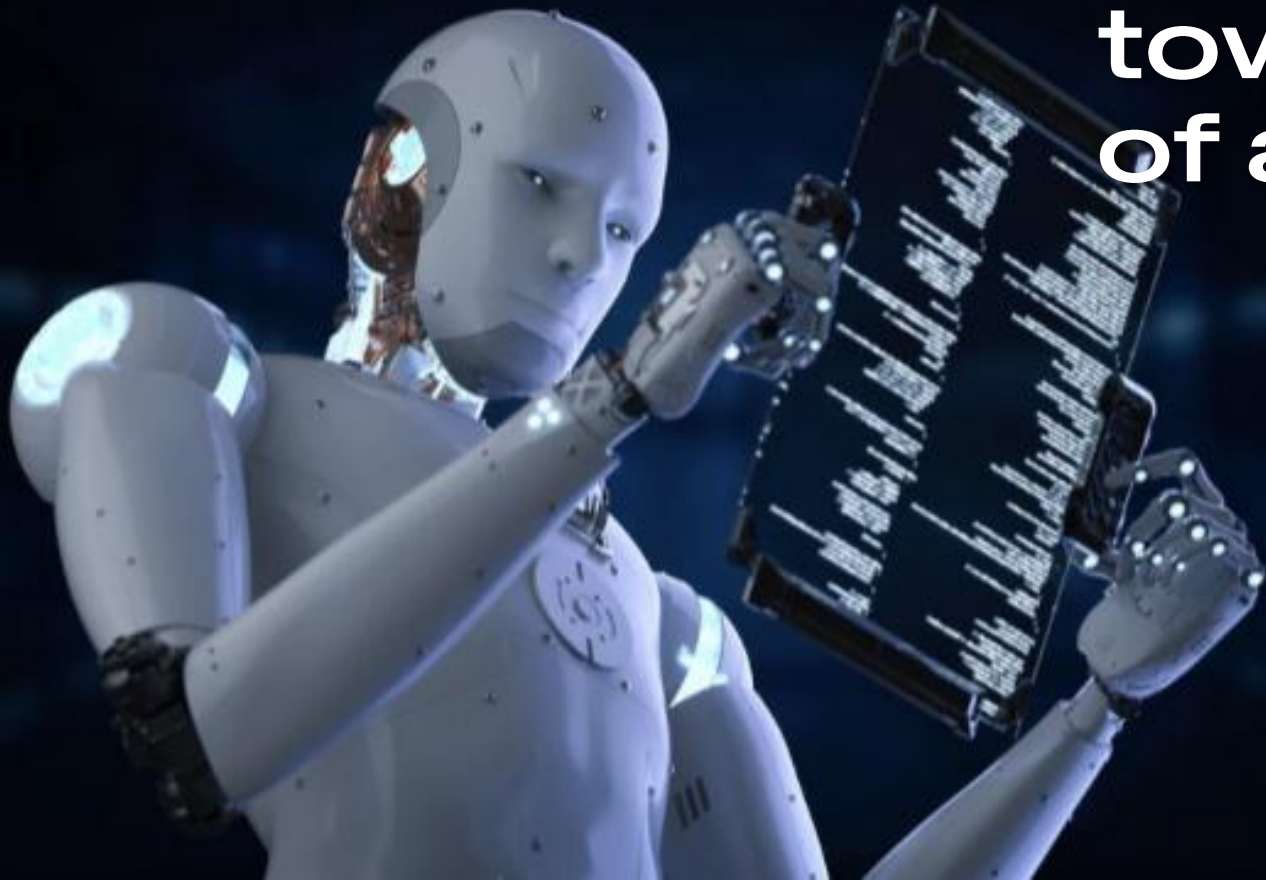
While AI promises a revolution, its implementation is hitting major financial, technical, and human barriers.

Challenges in AI implementation



Base: Retail executives (501)

Q36. What are the main challenges you face in implementing or using AI technologies?



The future of retail toward an economy of autonomy & trust

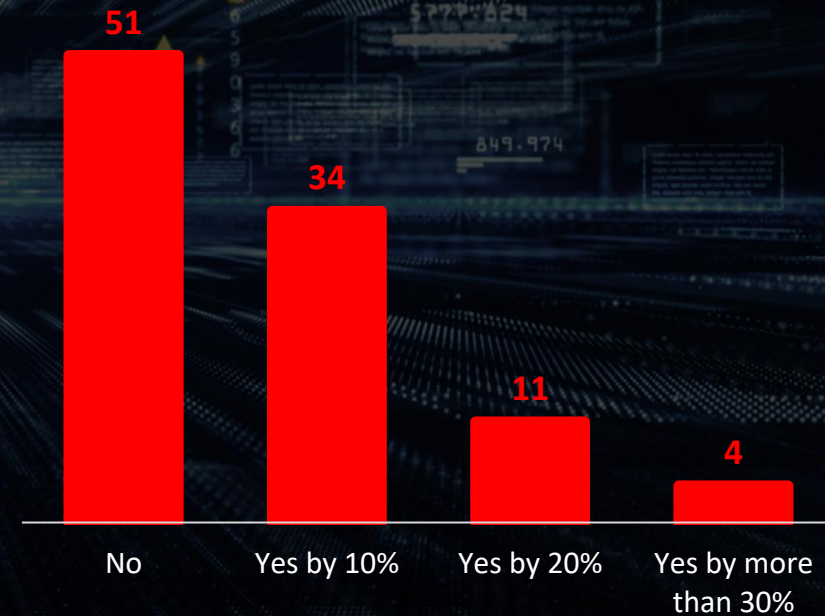
AI acts as a catalyst for professional evolution, focusing on upskilling rather than purely reducing headcount.

Change of job roles due to AI



Base: Retail executives (501)
Q38: In your company, has AI already changed job roles?

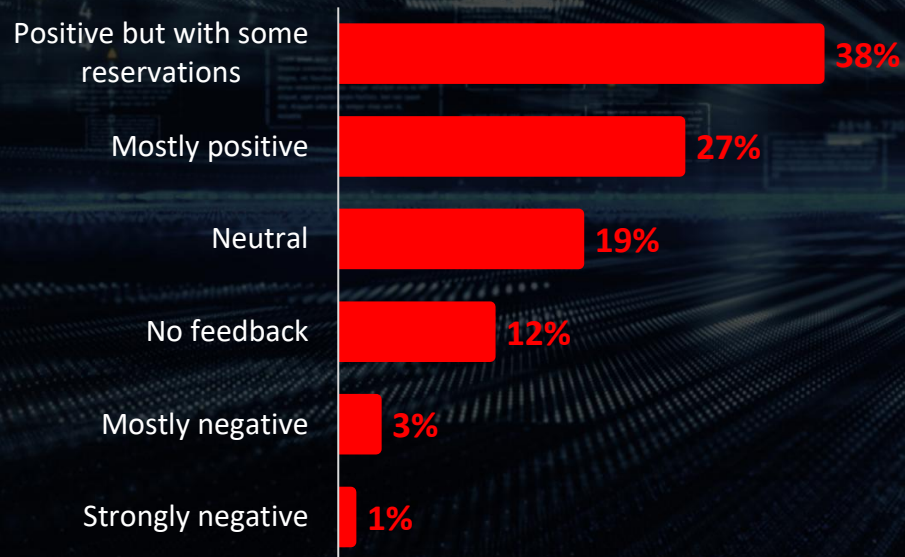
Reductions in the workforce since AI integration



Base: Retail executives (501)
Q38bis: In your company, will AI reduce the number of employees?

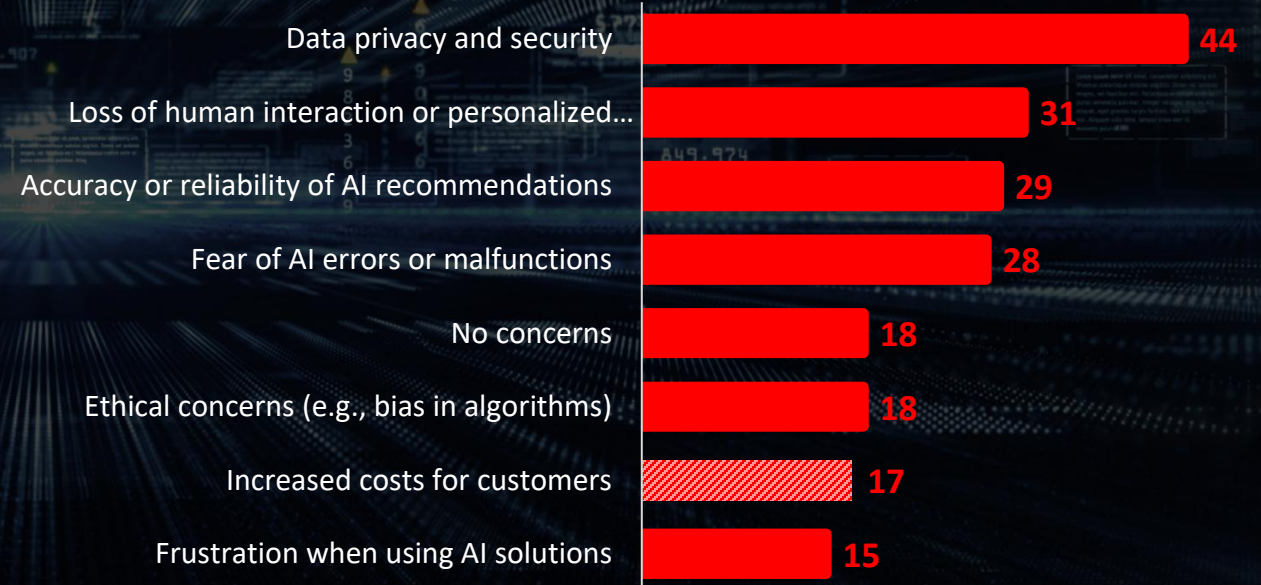
AI under surveillance. Customers embrace innovation but demand absolute data protection and the preservation of human contact.

Customer reactions to the deployment of AI solutions



Base: Les décideurs du retail (501)
Q40: Si vous avez déployé des solutions d'IA, comment vos clients y ont-ils réagi ?

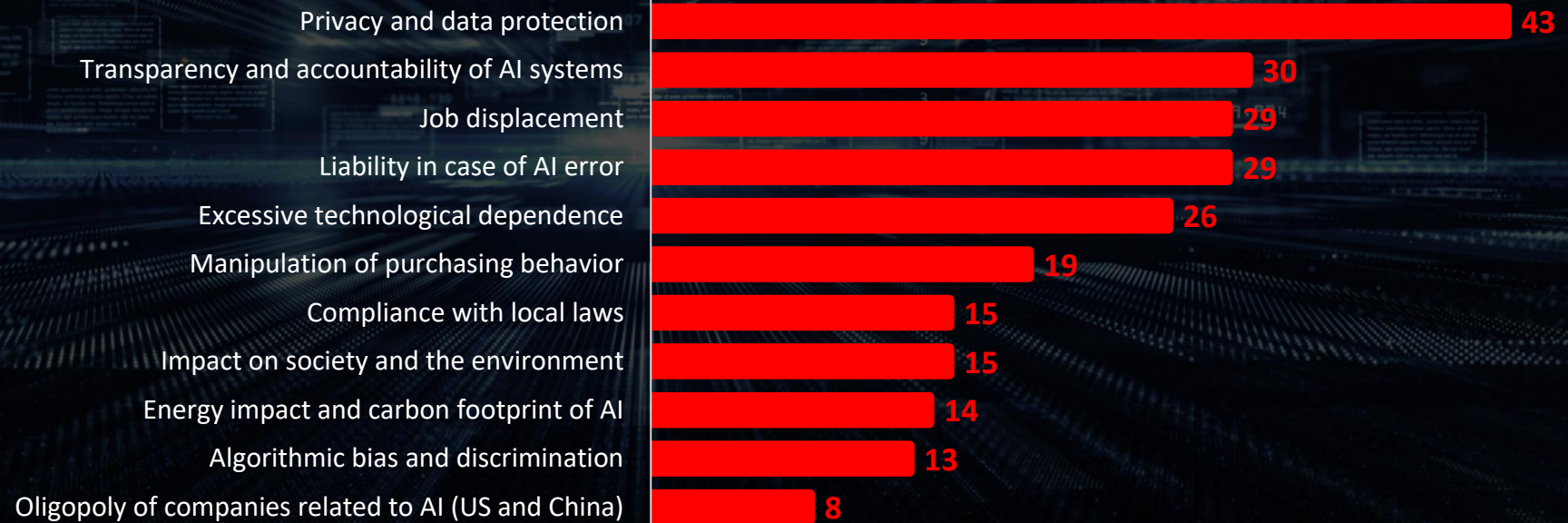
Customer reactions to AI deployment



Base: Retail executives (501)
Q41: What concerns have your customers expressed regarding the use of AI in your company?

Privacy and transparency emerge as the core pillars. Data is no longer just a technical resource; it has become a moral asset that defines the trust between retailers and consumers.

Main ethical implications of AI use



Base: Retail executives (501)

Q42: What are the main ethical implications you see in the use of AI in the retail sector?

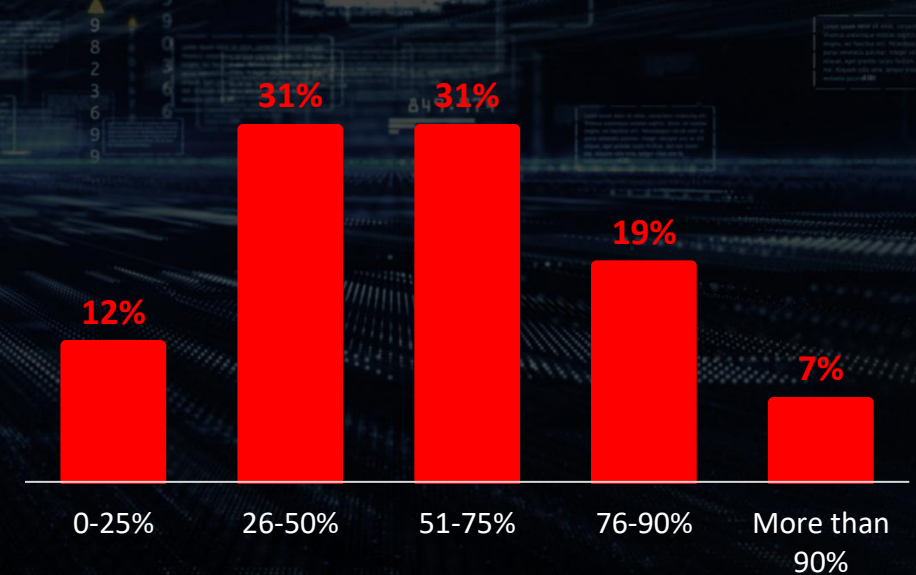
An inevitable hybridization where AI manages the majority of interactions to meet the absolute demand for immediacy and personalization

Buying logic



Base: Retail executives (501)
Q43: How do you think AI will change the customer experience in retail in the coming years?

Forecasts of AI-driven customer interactions



Base: Retail executives (501)
Q44: In 10 years, what percentage of customer interactions will be managed by AI?

03



Horizon 2030

Quels nouveaux scénarios IA vous semblent les plus probables ?

AUTONOMOUS AGENT MARKET

46%

An AI agent acts for the consumer as a private shopper, connected to store catalogs and current promotions. It optimizes the basket (price, substitution, availability), reserves the delivery slot or click & collect, applies coupons, and verifies loyalty. As soon as budget, deadlines, and preferences are met, the order is placed. In case of stockout, the agent suggests an equivalent alternative (national brand or private label) without inflating the bill. Returns, refunds, warranty extensions, and after-sales service follow-up are managed automatically via the store's OMS/CRM.

DISTRIBUTED ROBOTIC LOGISTICS

32%

"Close to demand" collection points. A network of small, autonomous robots runs on demand (pick and place) for replenishment and delivery. This reduces actual sales and warehouse manufacturing and distribution costs, and more relevant products and transport costs.

DISTRIBUTED WORKSHOPS & ROBOTIC LOGISTICS

32%

"Close to demand" production directly supplies stores, drives, and collection points. AI-driven micro-units manufacture best-sellers and short runs on demand (private label, seasonal), while robots and drones handle replenishment and last-mile delivery. In-store, the planogram adjusts to actual sales and weather whilst in e-commerce, proposed dates consider manufacturing and tour capacity. Consumers get reliable deadlines and more relevant products, while the retailer reduces stockouts, shrinkage, and transport costs.

29%

PLATFORM

Large ecosystems, compliance. The measures, and price campaigns, price common rules. To live, influence) and access to these c everything is sea



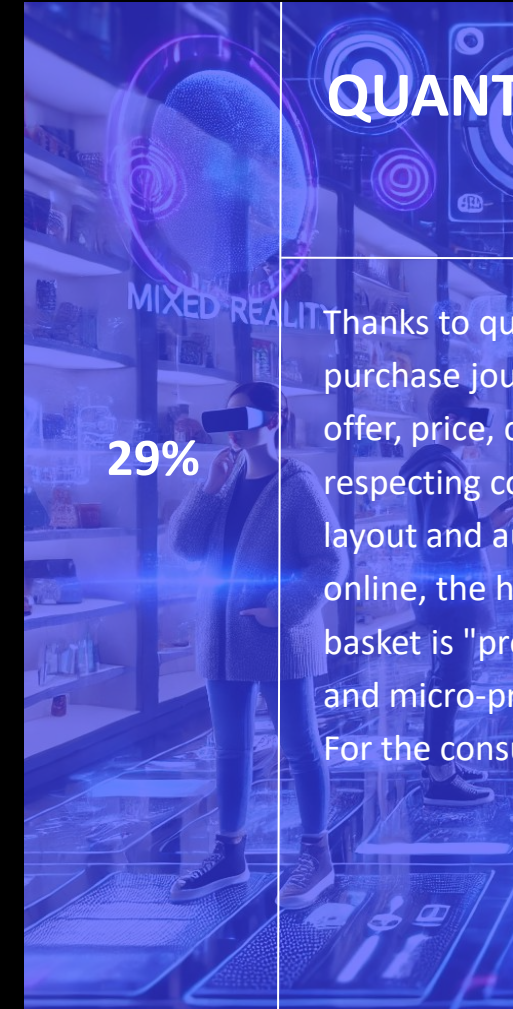
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PLATFORM STATES

29%

Large ecosystems link identity, payment, retail media, logistics, and compliance. The consumer identifies themselves once; taxation, anti-fraud measures, and product verifications are settled upon payment. RMN campaigns, prices, and display order adjust in real-time according to common rules. The experience is continuous between inspiration (content, live, influence) and purchase (basket, financing, delivery). For the retailer, access to these capabilities boosts reach and conversion; for the consumer, everything is seamless and verified.



QUANT

29%

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offer, price, c
respecting co
layout and a
online, the h
basket is "pr
and micro-pr
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QUANTUM PREDICTIVE COMMERCE

29%

Thanks to quantum computing, retailers simulate millions of possible purchase journeys in real-time. For each consumer, the system selects the offer, price, channel, and moment that maximize value and margin while respecting constraints (stock, deadlines, "Carbon+Compute"). In-store, layout and augmented advisors adjust to the most probable scenario and online, the homepage, search, lives, and RMN reconfigure in seconds. The basket is "pre-filled" with verified proposals (availability, returns, loyalty), and micro-promotions only open when they trigger a profitable purchase. For the consumer this means: less effort, fairer choices, and promises kept.

CONSTRAINTS

21%

Each basket displays... that weighs in recommendations... retailer highlights... guarantees and in... return" filters are... compromise between... manages its energy... avoided return rate

QUE

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system selects the
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, returns, loyalty),
profitable purchase.
and promises kept.

21%

CONSTRAINT-BASED COMMERCE

Each basket displays a simple score (transport/energy/compute impact) that weighs in recommendations, final price, and delivery options. The retailer highlights repair, refurbished items, and spare parts with clear guarantees and in-store availability. "Near me," "low impact," and "easy return" filters are available by default. The consumer chooses a clear compromise between use value, budget, and footprint, while the retailer manages its energy/ compute quotas and improves margin mix and avoided return rate.

Horizon 2030-2035: The coronation of the Agentic Economy where consumers delegate purchasing to AI for maximum efficiency and logistical reliability

AI outlook over the next 5/10 years



Base: Retail executives (501)

Q46: For the next 5-10 years, which new AI scenarios seem most likely to you?



Key Takeaways & solutions

5 Key Takeaways

1. Performance AI has replaced « showcase » AI

Retail has entered the era of economic realism: "cosmetic" AI (AR/VR, avatars) is being cast aside in favor of Utility AI. With 32% cost reduction and 42% time savings, AI is no longer a marketing innovation project—it is the primary engine driving the P&L.

2. From back-office tools to systemic infrastructure

AI is evolving beyond isolated tools like chatbots to become the enterprise's nervous system. The 2026-2027 challenge is industrialization: moving from 15% integration to massive supply chain robotization (47%), capable of autonomously managing flows to meet the absolute demand for immediate delivery.

3. The rise of B2A (business-to-agent)

The major disruption by 2030 is the delegation of the purchasing act: 46% of scenarios forecast autonomous agents acting on behalf of consumers. Traditional marketing must pivot: success will no longer depend on seducing the human eye, but on the technical ability to be the preferred choice of purchasing algorithms.

4. ROI as the fuel for technological sovereignty

With nearly 50% measurable positive results, AI is now self-funding its own expansion. However, this success creates a critical dependency: 50% of retailers are tied to Hyperscalers. Strategic survival will require internal mastery of data and proprietary algorithms to protect margins and independence.

5. « trust-by-design » AI as a competitive edge

Technology will only be accepted if it is ethical. Data privacy (44%) and transparency (30%) are the non-negotiable conditions for customer adoption. The winning retailers will be those who transform data security and algorithmic auditability into a reassuring brand promise.

Thank you! Thank you! Thank you!