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 Digital Innovation in Retail Observatory



Driving the Retail Transition: From Trends to Action for SMEs

Retail Digitalisation in Practice:
Trends and Insights from Italy and Europe



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GLOBAL RETAIL

KEY AREAS OF FOCUS



RETAIL IN EUROPE AND ITALY

CHALLENGES AND OPPORTUNITIES

GLOBAL RETAIL

KEY AREAS OF FOCUS



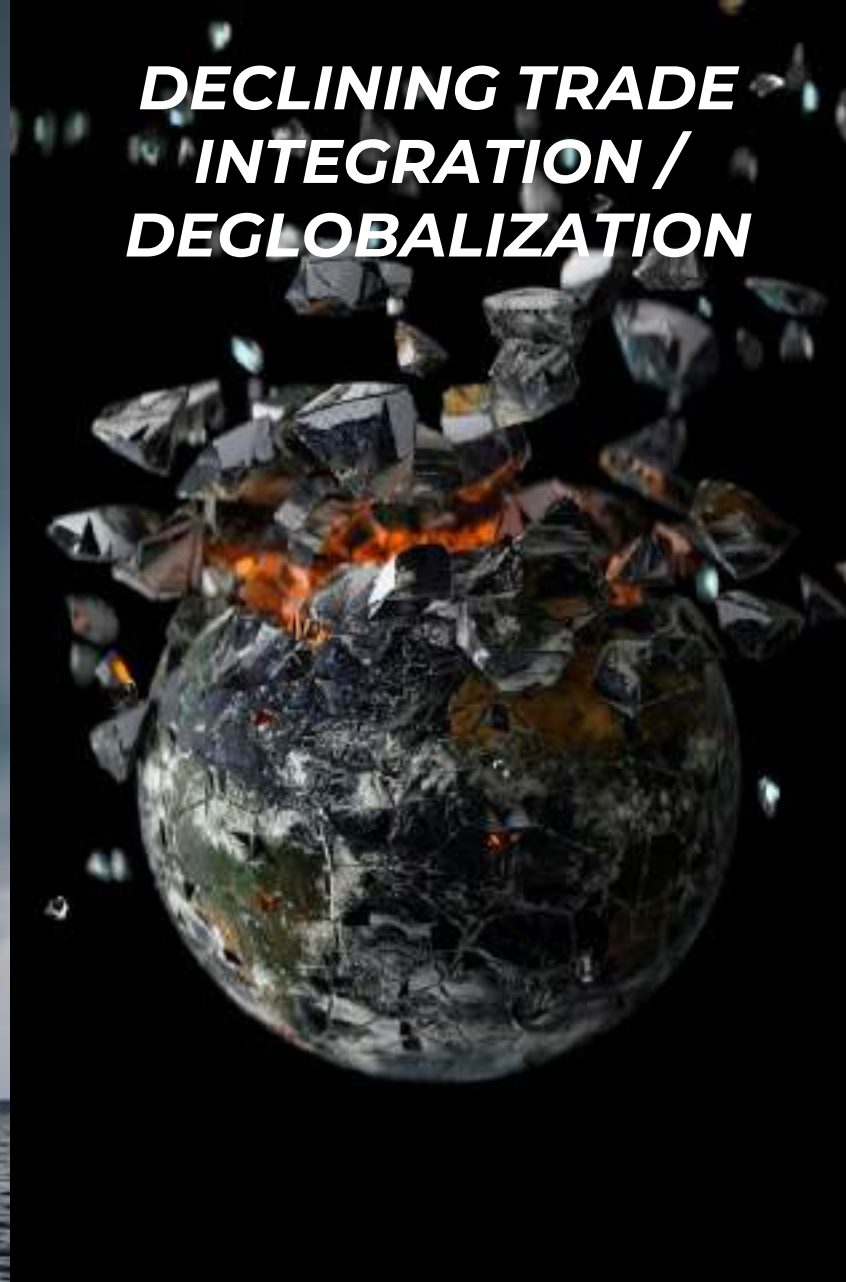
RETAIL IN EUROPE AND ITALY

CHALLENGES AND OPPORTUNITIES

***GEOPOLITICAL
TURBULENCE***



***DECLINING TRADE
INTEGRATION /
DEGLOBALIZATION***



***SHIFTS IN CONSUMER
PREFERENCES***



A rusted shopping cart is the central focus, standing in a desolate, abandoned store. The cart is heavily corroded, with a black handle and a white plastic basket. The background is filled with debris, including cardboard boxes and other shopping carts, suggesting a state of total retail collapse. The lighting is dim and moody, emphasizing the bleakness of the scene.

RETAIL APOCALYPSE...


Over 15,000 stores closed across the US in the past two years, reflecting a broader Western Retail trend driven by rising costs and shifting consumer behavior...and expected to persist into 2026

...RESILIENCE OF BRICK-AND-MORTAR

***“In this kind of a dangerous world right now...
we’re craving that sense of safety and that sense of
attachment” (Kevin Kelley)***

***This vibrant resurgence of the store proves that
the Retail market is more competitive and
dynamic today than at any point in history***





***PARTNERSHIPS,
MERGERS AND
ACQUISITIONS***



***RENOVATION OF THE
COMMERCIAL
INFRASTRUCTURE***



***NEW PLATFORM-BASED
BUSINESS MODELS***

PARTNERSHIPS, MERGERS AND ACQUISITIONS

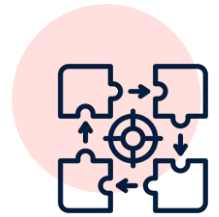


EXPANSION AND GROWTH

JD.com



acquires a majority stake in the German company Ceconomy (MediaMarkt) to expand its presence in 11 European countries

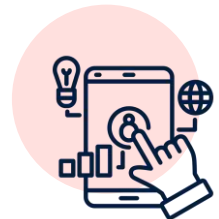


CONSOLIDATION IN SPECIFIC MARKETS

Dick's Sporting Goods



completes acquisition of Foot Locker, creating global sports retail leader operating 3,200+ stores across 20 countries

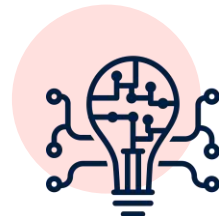


INTEGRATION OF SKILLS AND TECHNOLOGIES

Ikea



takes over Locus, an autonomous robotics company, to optimize e-commerce logistics and order fulfillment operations



EXPLORING CUTTING-EDGE TECHNOLOGIES

Walmart



partners with OpenAI to integrate conversational AI into its digital channels and for customer support

RENOVATION OF THE COMMERCIAL INFRASTRUCTURE



SEEKING EFFICIENCY

Carrefour



closed over 100 stores across Italy to reduce losses, implementing cost rationalization program targeting €1 billion annual savings through 2030 and refocusing on core markets

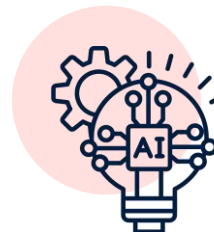


FOCUS ON OMNICHANNEL INTEGRATION

Macy's



will close 66 department stores to invest in expanding omnichannel services at its remaining stores



INNOVATION AND TECHNOLOGY

REWE



launches autonomous stores powered by computer vision technology, enabling checkout-free shopping where customers enter, shop, and exit without scanning products

NEW PLATFORM-BASED BUSINESS MODELS



NEW SOURCES OF VALUE

Petsmart



launches “The Pharmacy at PetSmart,” an online platform for ordering prescription-only pet medications and supplements (with prescriptions verified by veterinarians) with home delivery



USE OF EXISTING ASSETS

MediaMarktSaturn



launched its offsite retail media program in Germany, with rollout across five European countries starting in October 2025



ENGAGEMENT OF MULTIPLE STAKEHOLDERS

Walmart



expands its “GoLocal” platform, which connects customers with independent drivers, enhancing Walmart's logistics operations with a collaborative and flexible delivery network

GLOBAL RETAIL
KEY AREAS OF FOCUS



RETAIL IN EUROPE AND ITALY
CHALLENGES AND OPPORTUNITIES

AVERAGE NOMINAL WAGE PER EMPLOYEE

VARIATION %
2015-2025



GENERAL CONSUMER PRICE INDEX

VARIATION %
2015-2025



AVERAGE REAL WAGE PER EMPLOYEE Inflation-adjusted nominal wage (€/year)

VARIATION %
2015-2025



ITALY: **RELATIVE DECLINE IN WORKERS' INCOME** COMPARED TO EUROPE OVER THE PAST DECADE

ITALY AND EUROPE: **SIMILAR INFLATION TREND** OVER THE PAST DECADE

ITALY: **LOSS OF PURCHASING POWER** COMPARED TO EUROPE OVER THE PAST DECADE

WAGE GROWTH HAS NOT KEPT PACE WITH PRICE INCREASES

Source: Eurostat

Source : Eurostat, Istat, Average annual year-over-year changes

Source : Eurostat, Istat, Average annual year-over-year changes

BETWEEN 2015 AND 2024, **CHANGES IN THE CONSUMER BASKET** OF ITALIAN HOUSEHOLDS



GENERAL INDEX OF

CONSUMER PRICES



+20,8%

MEDIAN MONTHLY

HOUSEHOLD EXPENDITURE



+4,4%

ESSENTIAL CONSUMPTION HAS INCREASED
food, non-alcoholic beverages, health

**CONSUMPTION OF NON-ESSENTIAL GOODS
HAS DECLINED**

alcoholic beverages and tobacco, clothing and footwear, recreation, sports and culture



**CONSUMER
PROTECTION**



**CONSUMER
ADVOCACY**



ACCESSIBILITY



**FAIR
COMPETITION**



IMPORT CONTROL



**ETHICS AND AI
TRANSPARENCY**



CONSUMER
PROTECTION

ANOTHER FACTOR SHAPING THE EUROPEAN RETAIL LANDSCAPE... IS THE SIGNIFICANT REGULATORY EVOLUTION

STRENGTHENING CONSUMER PROTECTION, PROMOTING SUSTAINABLE PRACTICES
HARMONIZING LEGISLATION AMONG EU MEMBER STATES

FAIR
COMPETITION



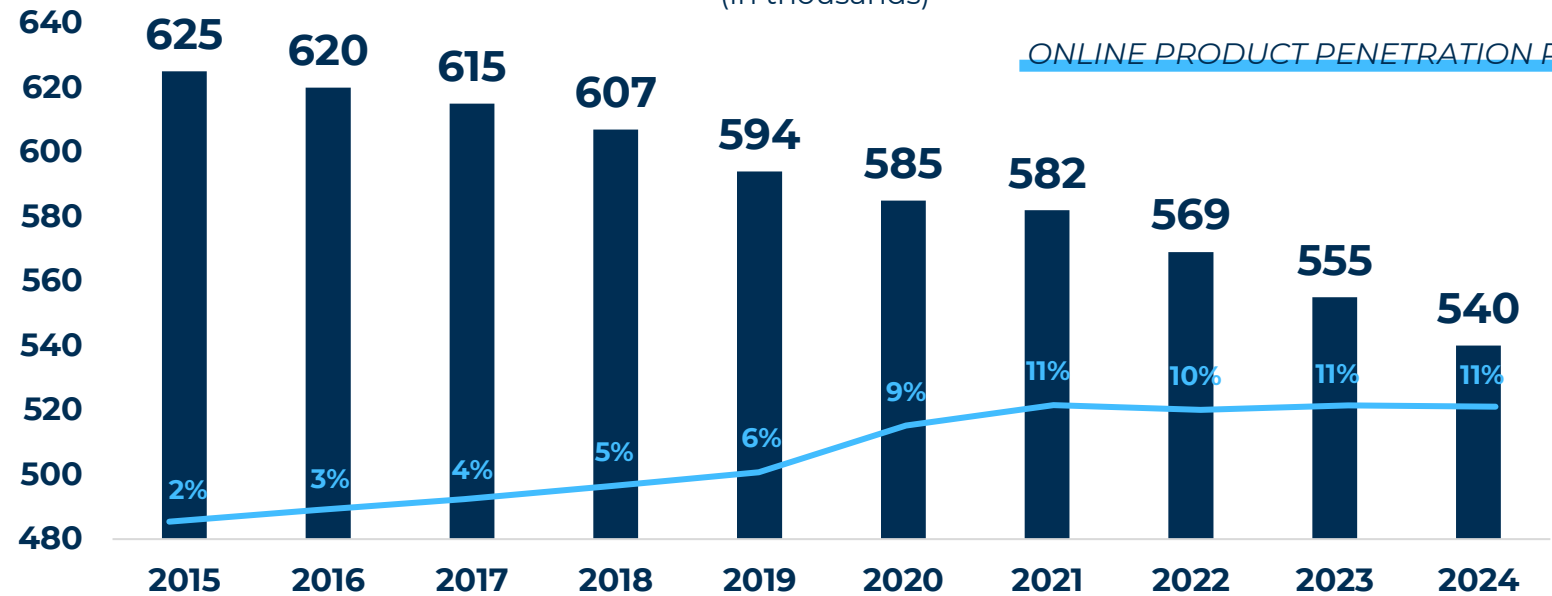
IMPORT CONTROL



ETHICS AND AI
TRANSPARENCY



NUMBER OF RETAIL STORES (EXCLUDING RESTAURANTS) IN ITALY (in thousands)



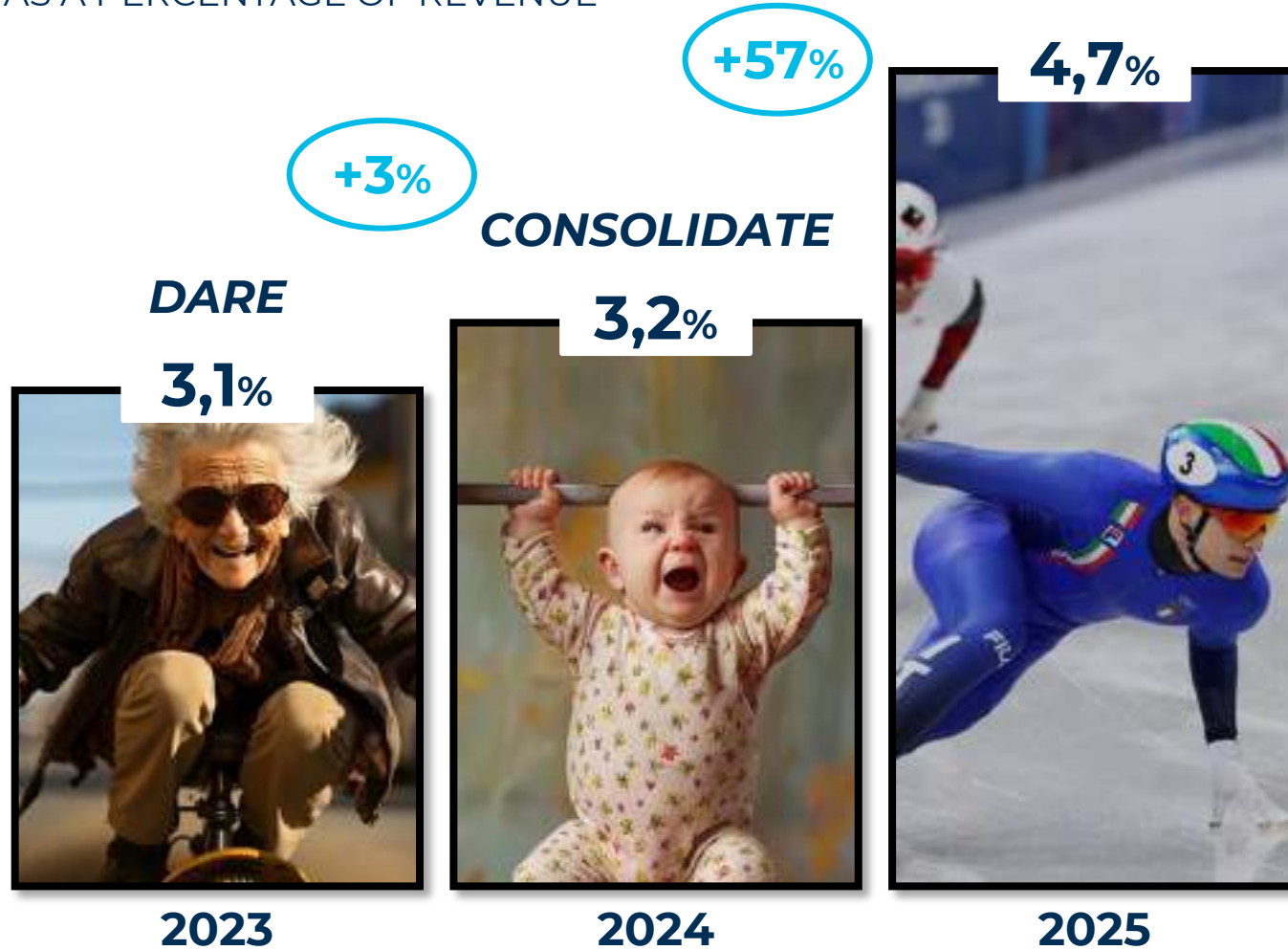
Fonte: Analysis based on data from Osservatorio Commercio - MISE

A **DECLINE** IN THE **NUMBER OF STORES** IN A PARTICULAR INDUSTRY IS **NOT ALWAYS LINKED** TO A SIGNIFICANT **INCREASE** IN ITS **ONLINE PENETRATION RATE**



***AN UNSTABLE ENVIRONMENT..
HOW ARE RETAILERS RESPONDING IN ITALY?***

DIGITAL INVESTMENT AS A PERCENTAGE OF REVENUE



**DIGITAL TECHNOLOGY AS A
TOOL FOR COST REDUCTION
AND IMPROVED EFFICIENCY**

Sample: 80 leading Italian retailers by revenue

INTEGRATION OF ARTIFICIAL INTELLIGENCE



DATA VALORISATION



CUSTOMER EXPERIENCE IMPROVEMENT



INTEGRATION OF ARTIFICIAL INTELLIGENCE



DATA VALORISATION

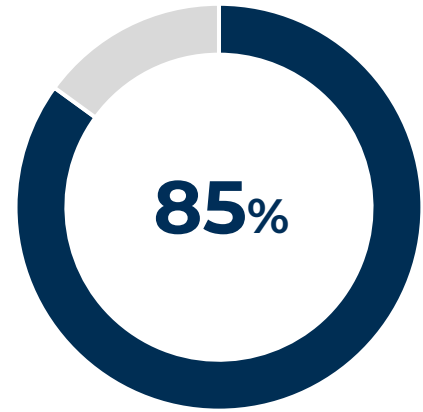
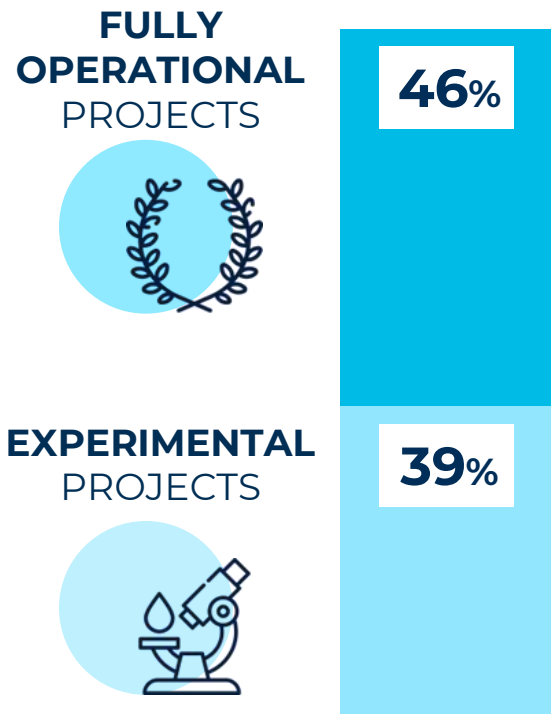


CUSTOMER EXPERIENCE IMPROVEMENT



ITALY'S RETAILERS ARE SHOWING
GROWING INTEREST IN...

...**TRADITIONAL AI**



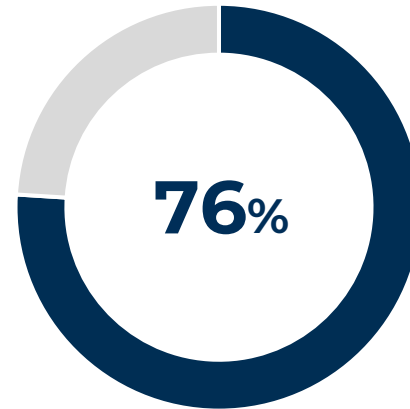
OF RETAILERS HAVE **AT LEAST ONE PROJECT**
BASED ON **TRADITIONAL AI**



Sample: 70 leading Italian retailers by revenue

ITALY'S RETAILERS ARE SHOWING GROWING INTEREST IN...

...**GENERATIVE AI**



MARKETING

*scalable and customized
content production*



IN STORE EXPERIENCE

*support for customers and
employees in the decision-
making process*



CUSTOMER SERVICE

*advanced conversational
interactions*



OF RETAILERS HAVE **AT
LEAST ONE PILOT PROJECT
BASED ON GENERATIVE AI**

Sample: 70 leading Italian retailers by revenue



**INTEGRATION OF ARTIFICIAL
INTELLIGENCE**



DATA VALORISATION



**CUSTOMER EXPERIENCE
IMPROVEMENT**



ITALIAN RETAILERS REMAIN COMMITTED TO BOTH MONETARY AND NON-MONETARY **VALUE CREATION** FROM **DATA**

BUSINESS INTELLIGENCE ANALYTICS



turn data into insights that help inform
strategic and operational decisions

78%

PittaRosso

CUSTOMER RELATIONSHIP MANAGEMENT



enable more consistent and
personalized customer interactions
across all sales channels

67%

Selex

CUSTOMER DATA PLATFORM



enable the creation of a unified view of
the customer, overcoming data
fragmentation

52%

MediaWorld

Sample: 70 leading Italian retailers by revenue



Key areas of innovation for Retail in Italy

INTEGRATION OF ARTIFICIAL INTELLIGENCE



DATA VALORISATION



CUSTOMER EXPERIENCE IMPROVEMENT



TECHNOLOGY HELPS **IMPROVE**
THE **IN-STORE CUSTOMER EXPERIENCE**

AUTOMATION

OF PURCHASING PROCESSES



DIGITAL COUPONING
& LOYALTY



SELF CHECK-OUT
SOLUTIONS

SIMPLIFICATION

OF BRAND-CUSTOMER INTERACTION



DIGITAL KIOSKS



SMART LABEL

SEAMLESS INTEGRATION

OF PHYSICAL AND DIGITAL CHANNELS



APPS WITH IN-
STORE FEATURES



SMART SHELF



EDUCATION

SUPERDRUG's innovative format merges "edutainment," combining **EDUCATION** and entertainment. Through interactive areas, social media stations and brand ambassadors, customers receive personalized advice, making the store a space that inspires informed choices

NORMAL's innovative format, with a colorful layout and "maze-like" path, creates an immersive shopping experience that captures customers' **INTEREST**, surrounding them with a wide variety of inspiring products

INTEREST

PURPOSE

DECATHLON's innovative format is transforming the **PURPOSE** of its stores, offering services like personalization, rentals, and gyms to build loyalty and create new reasons for visits. In Rome, it features a gym, while in Como, a shop-in-shop for cycling

MAISONS DU MONDE's innovative format in Cagliari is an ecosystem that fosters **INTERACTION** between technology, online channels, and diverse customer segments. New features include self-checkout kiosks, tablets for browsing the product range, and a B2B corner for hotels and professionals

INTERACTION