

# Evolve or be left behind

How price pressure and the next digital disruption are reshaping retail

Decoding consumer behavior  
Volume 4



# Management summary

Our 2025 study of consumer behavior investigates how economic pressures and evolving consumer preferences are reshaping global shopping behavior. The survey, conducted in partnership with Potloc in December 2024 and January 2025, reveals a picture of overall optimism amid polarized sentiment: Consumer optimism is on the rise overall, driven by emerging markets such as China, the United Arab Emirates (UAE) and Brazil, while Western countries such as Germany and the United Kingdom remain cautious due to economic and political uncertainty. Younger generations are notably more hopeful than older demographics.

The survey also looks at how emerging online platforms are increasingly challenging traditional online and physical retailers. Platforms such as TikTok Shop and Temu are rapidly gaining traction, particularly among younger consumers, with their engaging content and strong value propositions. However, these platforms face challenges in the areas of trust, customer support and quality control – something that established retailers can exploit to their advantage.

To meet customers' needs, retailers need to pursue a dual-channel strategy. Online channels excel in convenience, efficiency and product discovery, but consumers prefer offline channels for experiential categories such as food and beverages, and home improvements. Best-in-class retailers must excel in both physical and online channels, delivering exceptional in-store experiences while seamlessly integrating their digital presence. By doing so, they can meet evolving consumer expectations with a compelling value proposition.

Finally, we find that sustainability is of secondary importance to consumers. People feel under financial pressure, which limits the extent to which their worries about sustainability influence their actual purchase decisions. However, there is regional variation here: 40% of Germans say they are worried about sustainability but only 22% are willing to pay more for eco-products, while just 13% of consumers in the UAE are worried but 36% are willing to pay more for such products, for instance. A potential strategy for brands is to integrate environmentally friendly aspects into their overall product positioning. As these elements increasingly serve as hygiene factors in purchase decisions, they can be framed as enhancements to perceived quality and value.

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## About this study

Roland Berger and Potloc conducted this study between December 2024 and January 2025 to gain detailed insights into consumer behavior trends around the globe. It surveyed 3,000 people from six countries, with 500 participants from each country: Brazil, China, Germany, the United Arab Emirates, United Kingdom and United States. This is the fourth in our series of studies of international consumer behavior. Its focus is on patterns observed in 2024 and forecasts for 2025, in light of current global economic and geopolitical instability. The first study highlighted a shift toward frugality and digital reliance due to COVID-19; the second looked at six key trends, including the prioritization of sustainability and quality as well as the importance of fast, free shipping, among other things; and the third analyzed spending patterns and the dynamic retail ecosystem. In this fourth study, we investigate the latest developments in consumer sentiment, with a special focus on changes in spending and channel behavior.

## Fast facts

**28%**  
- VS. -  
**10%**

Net positive sentiment was higher in 2025 than in 2024



of consumers say price is their number one purchase criterion

**55%**

of consumers have made purchases on social commerce platforms (TikTok Shop, Temu, Shein, etc.)

# Consumer optimism is polarized

An in-depth look at key consumer trends in 2024 and consumers' intentions for 2025



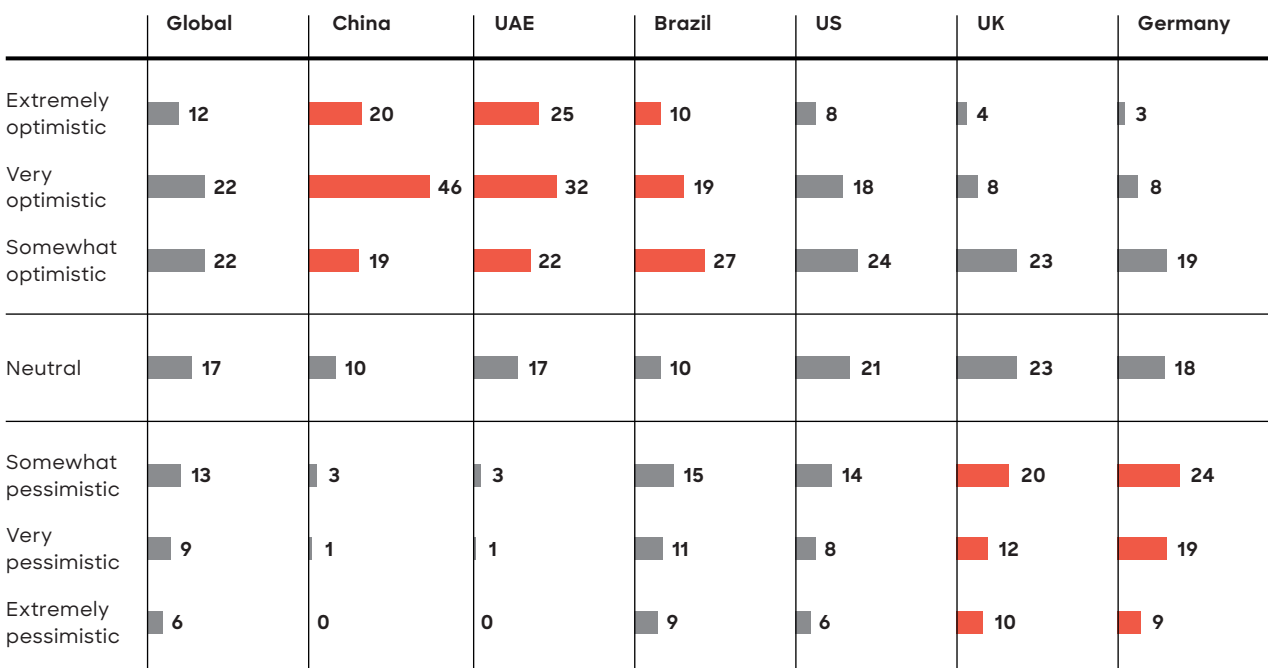
## Regional disparities in consumer sentiment

Overall, consumer optimism is on the rise. However, stark differences in mood exist between Western and Eastern countries. In broad terms, consumers are more confident in emerging economies and more cautious in developed markets. The reason for this difference lies with the distinct economic, social and political challenges faced by different regions – against a general backdrop of rapid change, high uncertainty and rising global tension.

Among the positive nations, Chinese participants show the strongest positive outlook, with 85% feeling optimistic. Driving this is strong domestic demand and initiatives such as the "Made in China 2025" strategic plan, which promote national pride and a feeling of confidence. Respondents from the United Arab Emirates (UAE) are also broadly optimistic about the future, with 79% saying they are optimistic. The UAE has experienced declining inflation, and interest rates are expected to fall further as the UAE Central Bank mirrors the Federal Reserve. The country's position as a global trade hub between large global economies, combined with its continued investment in non-oil sectors under the D33 Agenda, further fuel optimism about sustained future resilience.

On the more negative side, countries such as Germany and the United Kingdom share a pessimistic outlook. Germany is the most pessimistic country in this study, with 52% of respondents saying they are pessimistic. The United Kingdom is only slightly better, with 42% feeling pessimistic. Behind this sentiment lie factors such as proximity to Russia's war in Ukraine, political change in the United States and the sustained domestic economic slowdown.

### A How do you feel about the current situation? [%]



Total may not add up to 100% due to rounding

Source: Global consumer survey by Roland Berger and Potloc

The United States and Brazil lie somewhere between these two extremes, with just over half of respondents feeling optimistic about the future. Both nations have been dealing with tighter labor markets and unemployment rates at historic lows, driving up wages and confidence about future opportunities.

Besides these regional disparities, our survey also reveals a generational divide. Age-based analysis of the results reveals that optimism peaks among younger generations, particularly those aged 25-34, while older generations express heightened skepticism and dissatisfaction, especially the 65+ age group. This can perhaps be explained by the differing priorities of different generations and a greater ability among the young to adapt to rapid changes. Moreover, this generational pattern is consistent with our findings from last year, indicating a persistent trend in sentiment across age groups. ▶ A

## What is driving consumer sentiment?

To understand why these differences in sentiment exist, we analyzed the societal and personal factors shaping consumer outlooks. Societal concerns – worries about politics, economics, the climate and so on – were the dominant factors, with 39% of respondents feeling negative about them. Economic and political concerns in particular drive the negative sentiment that we found. The reasons are not hard to find: In 2024, elections in more than 60 countries fueled volatility, as new governments implemented trade and fiscal policies. President Trump's re-election, driven by tariff promises aimed at boosting US confidence, initially bolstered sentiment; however, as the tariffs took effect, businesses and

### B How do you currently feel about the following categories? [%]



Bad/very bad Neutral Good/very good

Total may not add up to 100% due to rounding

Source: Global consumer survey by Roland Berger and Potloc

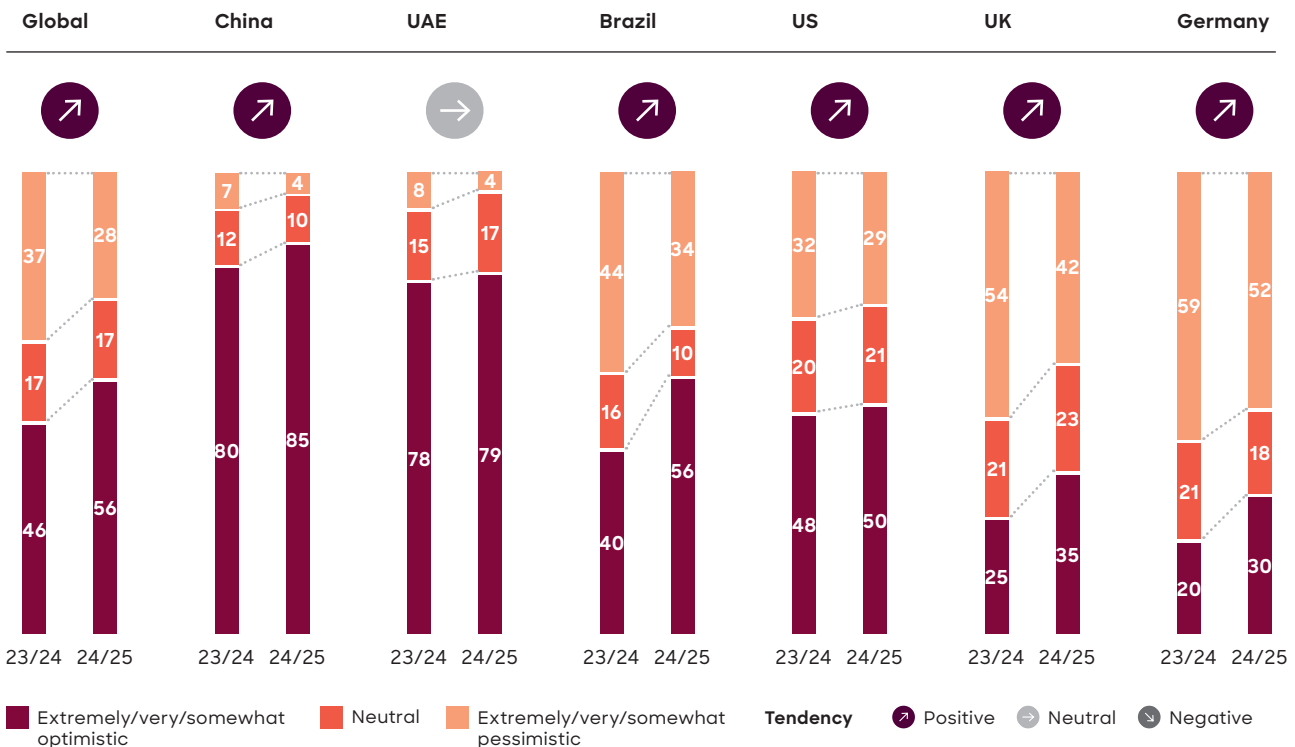
consumers grew increasingly uneasy. Meanwhile, uncertainty persisted over Ukraine, the Middle East and other geopolitical challenges. In the United Kingdom, 67% of respondents expressed economic and political concerns, and the governing Labour Party saw a sharp decline in its approval rating (down 47%) amid controversial decisions such as cutting Winter Fuel Payments during a cost-of-living crisis. Germany faced political uncertainty after its governing coalition dissolved, with 80% of respondents citing politics as their top worry. On top of this, economic stagnation – especially in the European Union, where growth remains sluggish – has added to consumer pessimism.

Conversely, personal factors such as mental and physical health were bright spots in the global picture, with more than 50% of respondents feeling positive about them. This optimism is likely due to people prioritizing health matters and lifestyle shifts since the COVID-19 pandemic. Consumers may also be focusing on personal wellbeing as a coping mechanism amid broader societal uncertainties. ▶ B

## Optimism is rising globally

Despite ongoing challenges and a high level of uncertainty, we see an overall upward trend across regions with regard to optimism. This is a continuation of the trend identified in 2024, with net positive sentiment in 2025 reaching net 28% (compared to net 10% in 2024). Despite global uncertainty and unrest, it seems that consumers worldwide are feeling more resilient and have a more positive outlook. ▶ C

### C How do you feel about the current situation? [%]



Total may not add up to 100% due to rounding

Source: Global consumer survey by Roland Berger and Potloc

## Inflation and economic disparity

The survey indicates that external factors continue to put pressure on consumer spending on both necessities and discretionary items. Inflation has affected a large portion of the surveyed population, with 76% of respondents reporting a rise in the price of products and services in the second half of 2024. Perceived economic challenges are thus indeed a global issue – supply chain disruptions and increased production costs are clearly passed on to consumers.

In Europe, economic stagnation – particularly in Germany, where growth remains weak – has further contributed to financial strain, dampening consumer confidence and limiting spending power. Additionally, many companies across the European Union have announced job reductions, adding to uncertainty in the labor market and further constraining household budgets. Consumer spending on basic necessities reflects a focus on the essentials, with many prioritizing affordability in food, household goods and healthcare. Rather than increasing discretionary spending, a significant portion of consumers are directing their budgets toward essential items, ensuring they can manage the ongoing financial pressure.

At the same time, economic disparity is growing. The increase in savings for 36% of respondents, alongside a decrease for 26%, indicates a divergence in consumers' financial health. Those who have maintained or increased their income (33% of respondents) may be more likely to save, while those experiencing income reductions (18%) may be forced to dip into savings to cover rising costs.

Inflation is set to continue in 2025. A majority of consumers anticipate that product prices for essential goods – and hence their spending on them – will increase over the coming six months. Spending on non-essential items is also set to remain high, with 47% of respondents expecting to spend more on these products. Inflationary pressure is thus likely to impact consumer spending in the medium term, albeit at a slightly lower rate than over the past six months. ▶ D

### D How have the following categories changed for you compared to 6 months ago, and how do you think they will change in the next 6 months? [%]

Category	Six months ago	Next six months
1 Price of products and services	5 Significant/moderate decrease, 19 Same, 76 Significant/moderate increase	9 Significant/moderate decrease, 26 Same, 65 Significant/moderate increase
2 Spending on basic necessities	5 Significant/moderate decrease, 27 Same, 68 Significant/moderate increase	8 Significant/moderate decrease, 32 Same, 60 Significant/moderate increase
3 Spending on non-essential items	12 Significant/moderate decrease, 39 Same, 49 Significant/moderate increase	12 Significant/moderate decrease, 41 Same, 47 Significant/moderate increase
4 Savings	26 Significant/moderate decrease, 38 Same, 36 Significant/moderate increase	16 Significant/moderate decrease, 36 Same, 49 Significant/moderate increase
5 Income	18 Significant/moderate decrease, 49 Same, 33 Significant/moderate increase	10 Significant/moderate decrease, 44 Same, 46 Significant/moderate increase

■ Significant/moderate decrease   ■ Same   ■ Significant/moderate increase

Total may not add up to 100% due to rounding

Source: Global consumer survey by Roland Berger and Potloc



As a result of this economic pressure and uncertainty, consumer spending has become increasingly pragmatic and focused on the essentials. Consumers have been taking cost-saving actions such as using coupons or opting for lower-priced retailers and brands to minimize the effect of price surges. Value, rather than brand or status, is at the forefront of their minds. In addition, according to the survey, only 17% of respondents have changed the timing of purchases or payments. This indicates that consumers are wary of long-term spending commitments and prioritize immediate value over deferred spending options. ▶ E

Consumers are concerned about sustainability issues, but they are also trying to cope with the financial pressure on them. As a result, sustainability currently has only a limited impact on their purchase decisions: Just 25% of consumers say they are willing to pay more for sustainable products. Notably, the countries that say they are the most concerned about climate issues – Brazil (55% of respondents), the United Kingdom (48%) and the United States (46%) – are also the least willing to spend more money on sustainable options. The share of respondents saying they did so in the past six months is just 14% in Brazil, 12% in the United Kingdom and 15% in the United States. It would appear that, while climate-related challenges such as droughts and wildfires keep sustainability top of mind in these regions, financial considerations are even more of a priority. This creates a gap that brands can only bridge through affordability and incentives, or by integrating environmentally friendly aspects into their core positioning – framing them not as premium add-ons but as essential contributors to product quality and value.

**E In the past 6 months, which of the following have you done when purchasing a product or service? [%]**

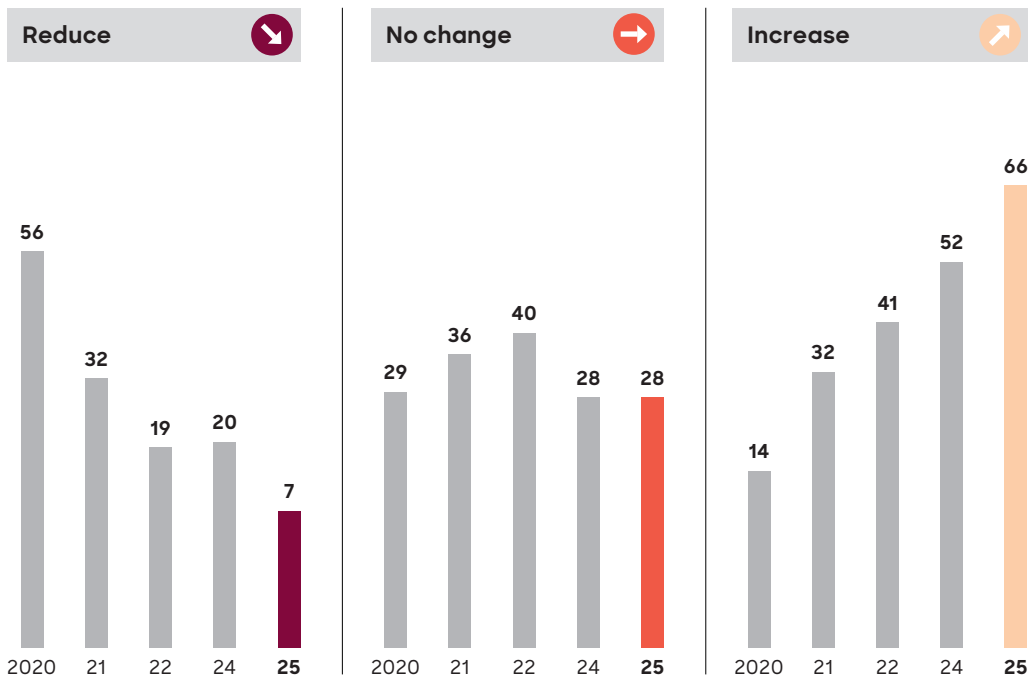


Source: Global consumer survey by Roland Berger and Potloc

## Consumer spending is set to rise in 2025

Our survey identifies a continuing trend toward increased spending in 2025, with 66% of respondents expecting to increase their monthly spending – up 14 percentage points on 2024. This is likely brought on by a combination of increased costs, inflationary pressure and regional optimism. ▶ **F**

### **F** How do you expect your overall monthly expenses to change in 2025 compared to 2024? [%] 1/2 – all respondents

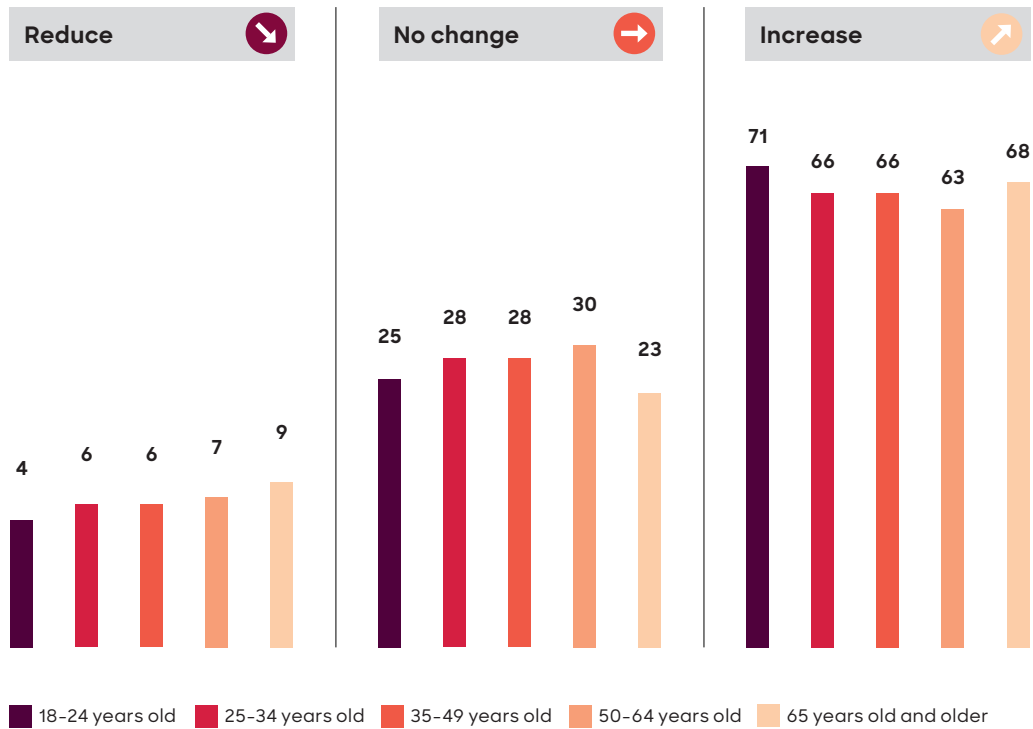


Total may not add up to 100% due to rounding

Source: Global consumer survey by Roland Berger and Potloc

Younger consumers are expected to show the highest proportional increase in spending in 2025. The anticipated increase in spending, particularly for those aged 18–24, reflects a complex interplay of external pressures and personal motivations. While 71% of this demographic expect to increase their spending in 2025 – a higher figure than the overall average of 66% – this surge can be partially attributed to inflationary pressures and the cost-of-living crisis that they face as they enter the workforce. These economic challenges may disproportionately impact younger individuals, putting them under financial strain. At the same time, younger people exhibit a marked consumer optimism that suggests a desire to spend more despite the economic pressure. In fact, Gen Z consumers (people born between 1997 and 2012) represent the wealthiest and highest-spending generation in history, currently accounting for 17% of global consumer spending, with many in this demographic still to come of age. Clearly, the younger generation will form a critical part of tomorrow's economy. ▶ **G**

**G How do you expect your overall monthly expenses to change in 2025 compared to 2024? [%] 2/2 - by age group**



Total may not add up to 100% due to rounding

Source: Global consumer survey by Roland Berger and Potloc

### Shifts in consumer behavior: 2023 vs. 2024

The economic situation led consumers to reduce visits to concerts and other events (30%) and restaurants (28%) in 2024. Instead, there was a notable increase in shopping online (37%), spending more free time at home (36%) and using home delivery services (33%). This supports the idea of consumers placing greater value on frugal convenience. While feeling pressured to reduce spending on non-essential outings, people have found ways of compensating for this through more comforts at home, thereby maintaining a positive outlook and fulfilling some of their need for "outside experiences".

Cuts in consumer spending compared to 2023 affect several categories in 2024. Particularly impacted were luxury products, which saw the biggest share of consumers cutting back in Brazil (49%) and Germany (39%). Overall, compared to the global average in 2023, a greater proportion of consumers maintained their level of spending on luxury goods – about 50% globally.

### Shifts in consumer behavior: Outlook for 2025

A significant percentage of respondents say that they will continue their current activities in 2025. In other words, many people anticipate that their behavior will not change dramatically this year, despite the observable trend toward increased – yet selective – spending.

On a global scale, we find signs of optimism in 2025. Thus, 39% of consumers hope to travel more for leisure, 33% expect to eat out more often and 31% plan to visit concerts and other events. The widespread intention to seek out experiences outside the home indicates consumers' need to connect with other people. In parallel, shopping at discounters is expected to increase by 30% in 2025 – indeed, this is one of the categories with the lowest intention on the part of consumers to reduce this behavior. So, while there is increased willingness to spend on certain activities, consumers remain price-conscious and on the lookout for good-value options.

From a regional perspective, Germany stands out from the other countries surveyed, with the strongest reductions in planned spending expected in 2025. The reason may be that Germany was hit more strongly by inflationary pressures in late 2024 than other Eurozone countries. In addition, ongoing economic stagnation, coupled with the job cuts announced by major German companies, has further weakened consumer confidence and spending power. A similar – albeit less drastic – pattern is found for the United Kingdom and United States, where consumers intend to continue cutting back on non-essential spending. ▶ **H**

### H As a result of the economic situation, did you do more or less of the following in 2024 compared to 2023? And what do you expect for 2025? [%]

Item	2024 vs. 2023			Expectations for 2025			Difference [ppt] <sup>1</sup>
01 Shop online	37	49	14	32	57	11	-5 ▼
02 Spend more free time at home	36	49	15	32	58	10	-4 ▼
03 Consume healthier products	33	55	12	42	50	7	+9 ▲
04 Use home delivery services	31	50	19	29	57	15	-2 ▼
05 Shop at discounters	28	59	14	30	60	10	+2 ▲
06 Go to restaurants	27	44	28	33	51	16	+6 ▲
07 Support local stores and businesses	27	60	13	32	59	9	+5 ▲
08 Travel for pleasure	26	48	26	39	47	14	+13 ▲
09 Work from home	22	55	23	22	60	19	±0 ▶
10 Go to events/concerts	21	49	30	31	51	19	+10 ▲
11 Travel for work	20	56	24	26	56	18	+6 ▲
12 Shop for luxury goods	17	52	31	21	56	23	+4 ▲

More Same Less

<sup>1</sup> 'More' option for 2025 vs. 2024 Change in category 'More': ▲ Increase ▶ Stable ▼ Decrease

Total may not add up to 100% due to rounding

Source: Global consumer survey by Roland Berger and Potloc

# Looking ahead: Consumer trends for 2025

Seven key insights for retailers  
and brands

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What do the survey results tell us about the coming year? Below, we present seven key insights to help retailers and brands secure success in 2025, ranging from consumers' favored product categories to their preferred channels.

**Insight 1**\_Consumers are prioritizing nutrition and experiences

**Insight 2**\_Key purchase criteria are price, quality and brand reputation

**Insight 3**\_Online channels win on convenience, offline channels on customer care

**Insight 4**\_Customers prefer marketplaces online, and large retailers offline

**Insight 5**\_Almost half of all consumers plan to explore new channels

**Insight 6**\_New online platforms are capturing significant market share with engaging content

**Insight 7**\_Offline channels are most relevant for food and beverages, cars and home improvements

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## Insight 1

### Consumers are prioritizing nutrition and experiences

Our survey reveals an intention on the part of consumers to increase spending across product categories in all the countries covered. In fact, the only area where significant numbers of consumers are intending to cut back is alcohol. This trend is being driven by younger consumers, who are in general consuming less alcohol and shifting toward healthier lifestyles.

In the area of fashion and apparel, consumers say they are mainly interested in shoes, leisurewear and sportswear, reflecting changing lifestyles and a desire to dress casually.

Simultaneously, we find significant interest in beauty and skincare products. It would appear that consumers not only want to be healthy, they want to look healthy, too.

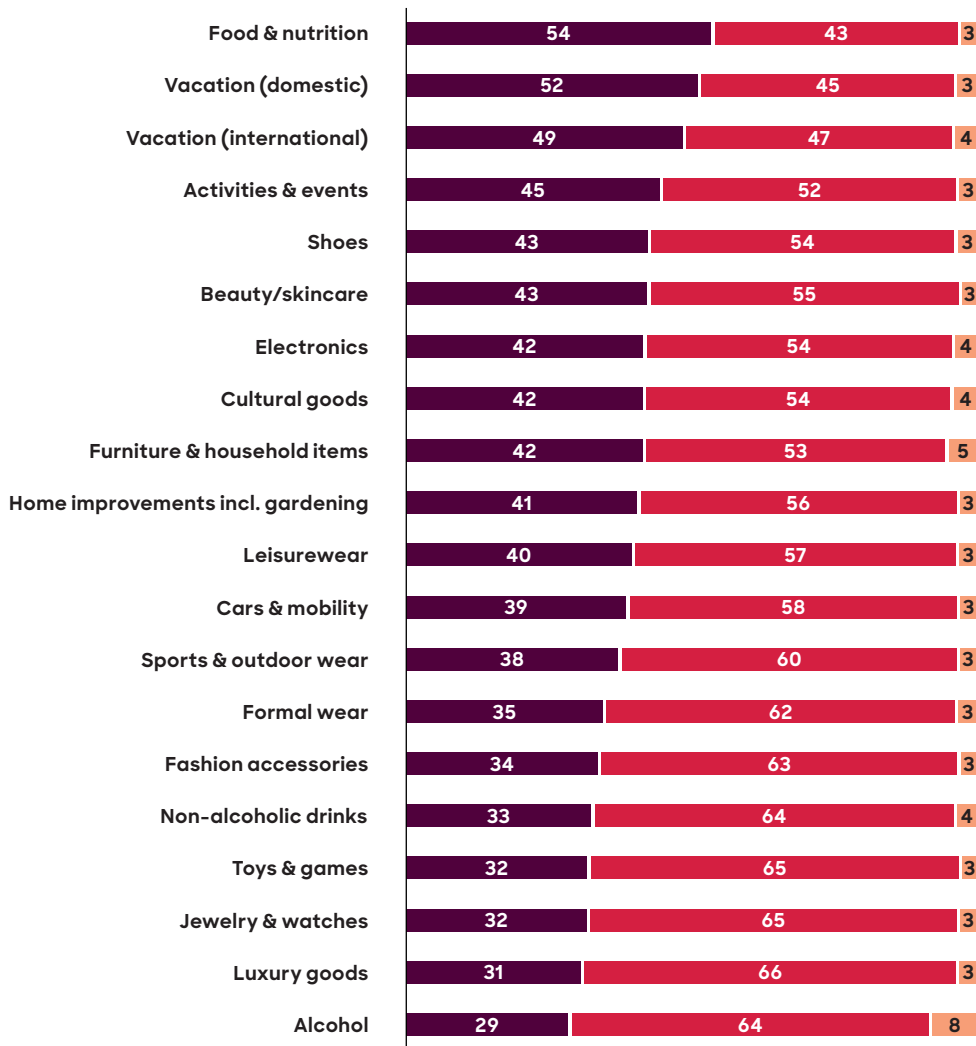
Another clear trend identifiable in the survey is consumers' desire for positive experiences both inside and outside the home. We find a strong intention on the part of consumers to pursue novel activities in 2025, with widespread interest in activities and events, as well as domestic and international travel – possibly making up for sluggish economies in the previous year. At the same time, the quality of the experience is becoming increasingly important, even when consumers stay at home. Thus,

spending on furniture and other household items, and also home improvements and gardening, is up significantly. Also driving this trend is the number of people working from home and the desire for a pleasant domestic environment. ▶ |

**// With consumers willing to trade down or switch brands to manage rising costs, consumer and retail businesses need to evolve."**

**Thorsten de Boer, Senior Partner**

**I How do you expect your spending on the following categories to change in 2025 compared to 2024? [%]**



■ Significantly/slightly increase ■ No change ■ Significantly/slightly decrease

Total may not add up to 100% due to rounding

Source: Global consumer survey by Roland Berger and Potloc

**Insight 2**

**Key purchase criteria are price, quality and brand reputation**

Price is the number one purchase criterion for more than 65% of consumers, in most product categories, closely followed by product quality and brand reputation. Some variation occurs by product category. Thus, essentials such as food and beverages, and also leisurewear, are clear price-driven choices, while higher-end products such as jewelry and beauty products are judged on quality and brand reputation. Consumers' focus on price is a reflection of the current economic situation, where inflation is putting them under pressure to search out value options. Nevertheless, the fact that quality and brand reputation are still significant demonstrates that consumers do not want to compromise on the experience their purchases offer.

**J The last time you bought something in each of these categories, how much did the following factors influence your decision? [%] 1/2**

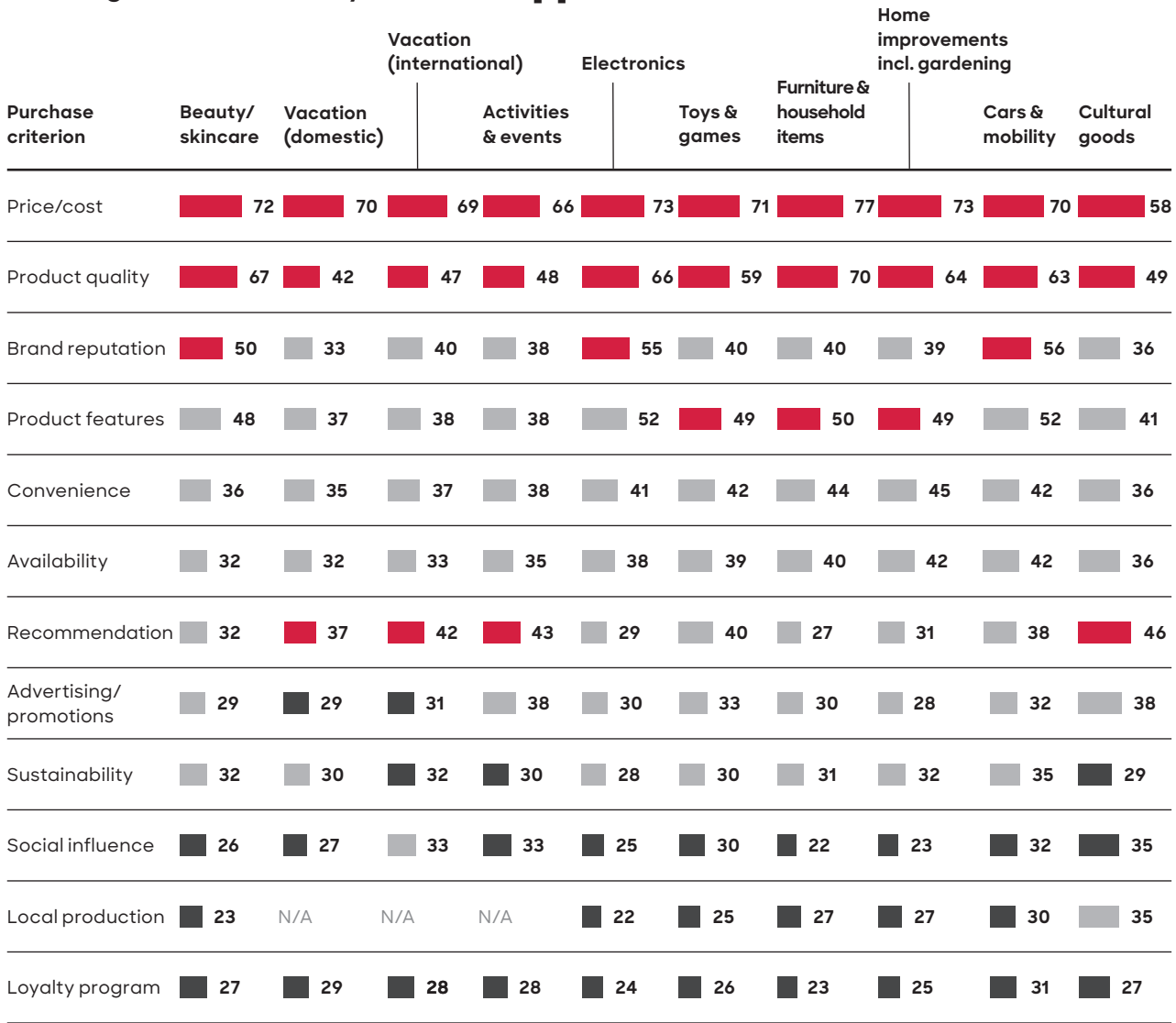


■ Top 3 factors ■ Bottom 3 factors

Source: Global consumer survey by Roland Berger and Potloc

Despite persistent global concerns, sustainability has declined as a key factor in consumers' purchase decisions, ranking among the bottom three key purchase criteria for 11 of the 20 product categories. It may be that, right now, consumers feel they need to prioritize their own wellbeing over the future wellbeing of the planet. Local production is also declining in importance, perhaps due to peoples' familiarity with the idea that today's supply chains are global in nature. However, sustainability remains an important consideration in the consumer space, and retailers should strive to enable sustainable choices even for consumers who may not see it as a primary purchase criterion. A strategic approach is to integrate environmentally friendly aspects into product positioning - not as premium features, but as inherent markers of quality and value - thereby making sustainability more accessible, relevant and compelling across segments.

**K** The last time you bought something in each of these categories, how much did the following factors influence your decision? [%] 2/2



■ Top 3 factors ■ Bottom 3 factors

Source: Global consumer survey by Roland Berger and Potloc

The survey also reveals some regional differences. In Germany, the United Kingdom, Brazil and the United States, price and quality are the top two purchase criteria across product categories. In China and the UAE, quality is the number one criterion. Number two in the UAE is price, as elsewhere, while number two in China is brand reputation. In fact, for Chinese consumers, price often comes further down the list of purchase criteria, in third place or lower – possibly because a high price is associated with high quality. Social influence is also an important factor in China, where culturally well-integrated social platforms form a central part of how people communicate with each other, and often combine identification, payment and other core functions. ▶ J ▶ K

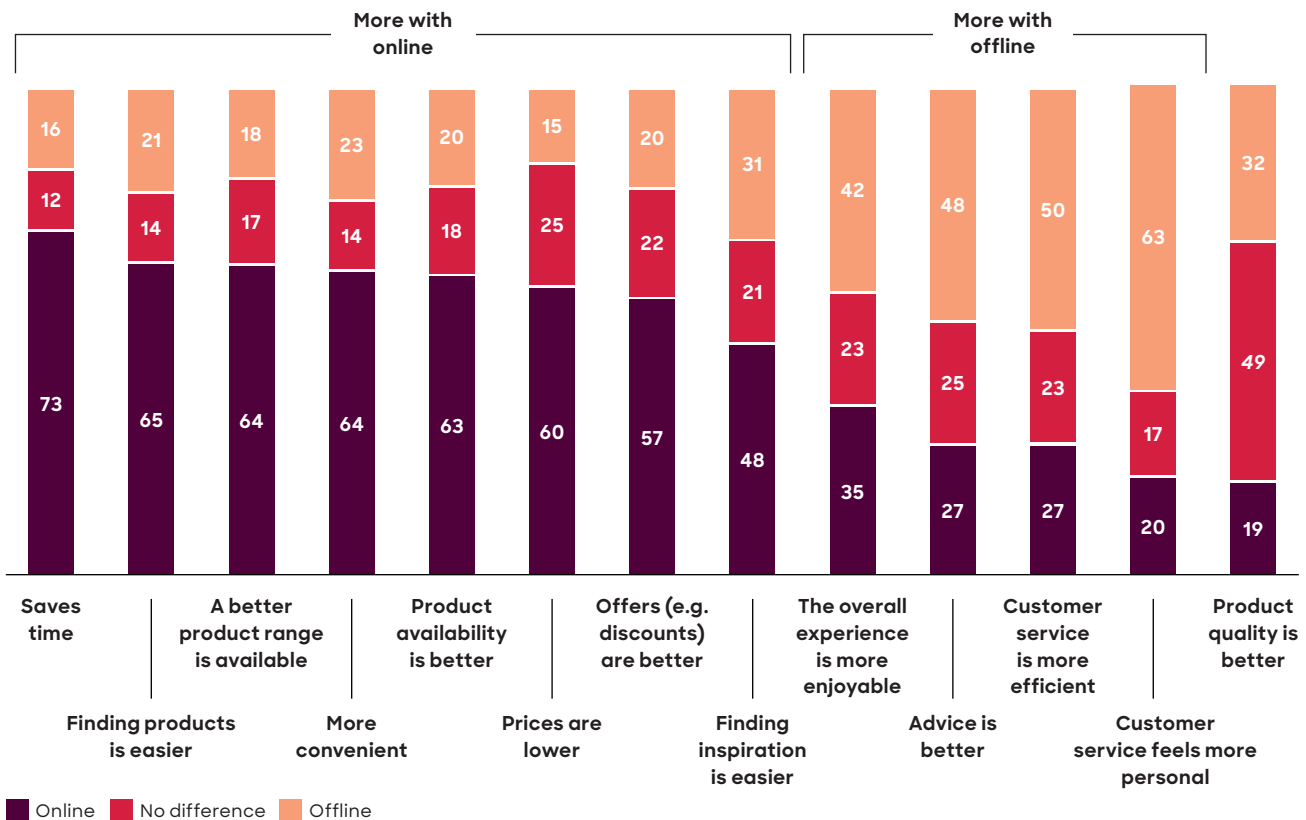
### Insight 3

## Online channels win on convenience, offline channels on customer care

Across all geographies, online shopping is predominantly associated with efficiency and convenience. Consumers value the time saved and the ease of finding products online. The broad product range available online also caters to consumers' diverse needs, allowing them to explore numerous options without the limitations of physical space. Lower prices and bigger discounts further increase the appeal of online shopping, making it a cost-effective choice in times of economic uncertainty. In addition, the possibility of comparing prices across a wide range of products is advantageous. What is more, shopping online allows consumers to find inspiration through curated content and personalized recommendations, adding a unique dimension to the experience and encouraging consumers to explore new products and trends.

By contrast, consumers associate offline shopping with a more enjoyable experience overall. Shopping in physical stores offers sensory aspects that cannot be replicated online. Consumers also appreciate the personalized interaction with sales staff, who can provide valuable advice and assistance, fostering a sense of connection and giving them the feeling that they are valued – which also boosts brand loyalty. Offline shopping is efficient, too:

### L Do you associate these qualities more with online shopping, offline (i.e. in-store) shopping, or is there no difference for you? [%]



Total may not add up to 100% due to rounding

Source: Global consumer survey by Roland Berger and Potloc



Consumers like getting quick answers to any questions or issues they have. Moreover, shopping in physical stores can be a social activity, a way to spend your free time in the company of friends or family.

When it comes to product quality, 49% of respondents do not feel that there is a significant difference between online and offline purchases. Clearly, e-commerce platforms are managing to meet the quality standards offered by traditional retailers, potentially blurring the lines between the different channels. This will open up further competition between them along other dimensions, such as on service or price – to the advantage of consumers.

Consumers in China and the UAE rate the online shopping experience more highly than offline. Interestingly, China is the only country where online shopping is also rated higher in terms of product quality. This may be attributed to its highly developed e-commerce ecosystem, which incentivizes online retailers to maintain high standards. Additionally, China has long been at the forefront of social shopping, integrating live streams and online channels into retail far earlier than many traditional economies. With its advanced infrastructure for convenience and seamless ordering, China sets a precedent that is likely to influence other regions as the online retail sector continues to expand and evolve. ▶L

## Insight 4













### Customers prefer marketplaces online, and large retailers offline

Globally, 73% of consumers prefer online marketplaces such as eBay, Amazon and TMALL. What sets these players apart from other online channels is their wide range of products across categories at competitive prices, combined with flexible shipping and payment options. Online marketplaces also have a much higher engagement rate than brand websites, for example, thanks to the use of ratings and reviews by other consumers. This ability to communicate, albeit indirectly, with other users and the feeling of participating in a social experience is something that online marketplaces share with social media platforms. In the survey, only China shows a slight preference for retailers' websites (72%) such as Walmart.com and JD.com over marketplaces (68%). This could be because the retailers' websites have greater flexibility when it comes to tailoring content to a local audience – something that may be more important to Chinese consumers than others. Additionally, trust in established brands and players tends to be stronger in China.

Surprisingly, the favored online shopping channels do not differ significantly across age groups. Thus, 40% of the over-50 age group shop on social media platforms, just nine percentage points below the average for all consumer age groups.

Offline, large retail chains (57%) and shopping malls (53%) are the preferred shopping locations globally, as they offer the greatest access to a broad product range and so act as a convenient one-stop shop for consumers. These preferences are more consistent across regions than preferences regarding online shopping, probably because, unlike online shopping, different offline store formats offer very different shopping experiences. For instance, shopping malls also serve as leisure destinations, combining shopping with entertainment, while local stores appeal to environmentally and socially conscious consumers and consumers who are seeking a personalized experience – something that they are more likely to get in a small store than in a large one. Regional availability also influences consumers' preferences, as different store formats are available in cities and in rural areas. ▶M

## M Which online channels and which physical store formats do you use most often? [%]

Rank	Online channels	Offline channels (physical stores)
#01	Marketplaces  73	Large retail chains  57
#02	Retailers' websites  50	Shopping malls  53
#03	Social media platforms  49	Discount stores  50
#04	Brand websites  41	Department stores  45
#05	Emerging e-com players  37	Local independent stores  42
#06	Other  2	Specialty stores  40
#07		Other  1

 Top 2 categories

Source: Global consumer survey by Roland Berger and Potloc

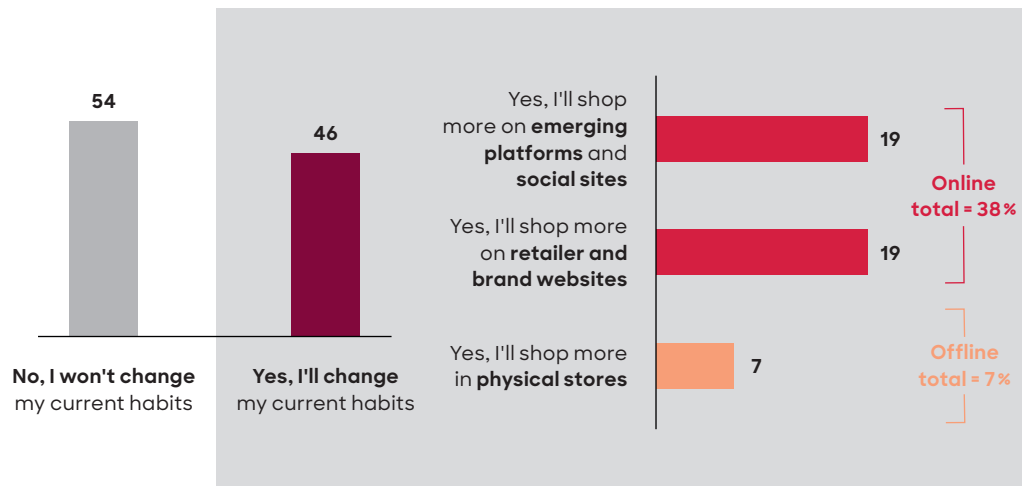
## Insight 5 Almost half of all consumers plan to explore new channels

Only 7% of consumers are interested in moving more toward offline channels. But 38% want to explore online channels in the near future. And this is only the overall figure – in China, it is as high as 82% and in the UAE 65%. In Europe, by contrast, consumers mainly plan to stick to their current behavior.

Consumers who intend to move more online are equally split between those planning to visit traditional retailer and brand websites (19%) and those planning to visit new platforms, such as TikTok Shop and Temu (19%). This indicates that the emerging platforms are able to generate a considerable amount of traction and should be considered direct competitors to traditional online retailers.

In terms of regional differences, UK consumers are the most satisfied with their current shopping experience, with 80% not planning to change their channel choices in the next six months. Consumers in the UAE are the most interested in shopping on traditional retailer and brand websites (38%), and they are also keen on exploring emerging platforms (27%). The pioneer for emerging platforms, however, is China, where 53% of consumers plan to shop more from Temu, Shein and the like. The reason for this strong preference is probably that most of these emerging platforms originate in China and enjoy strong cultural and social acceptance there. ▶ N

**N Do you intend to change your preferred shopping channel in the next 6 months? [%]**



Source: Global consumer survey by Roland Berger and Potloc

**Insight 6**

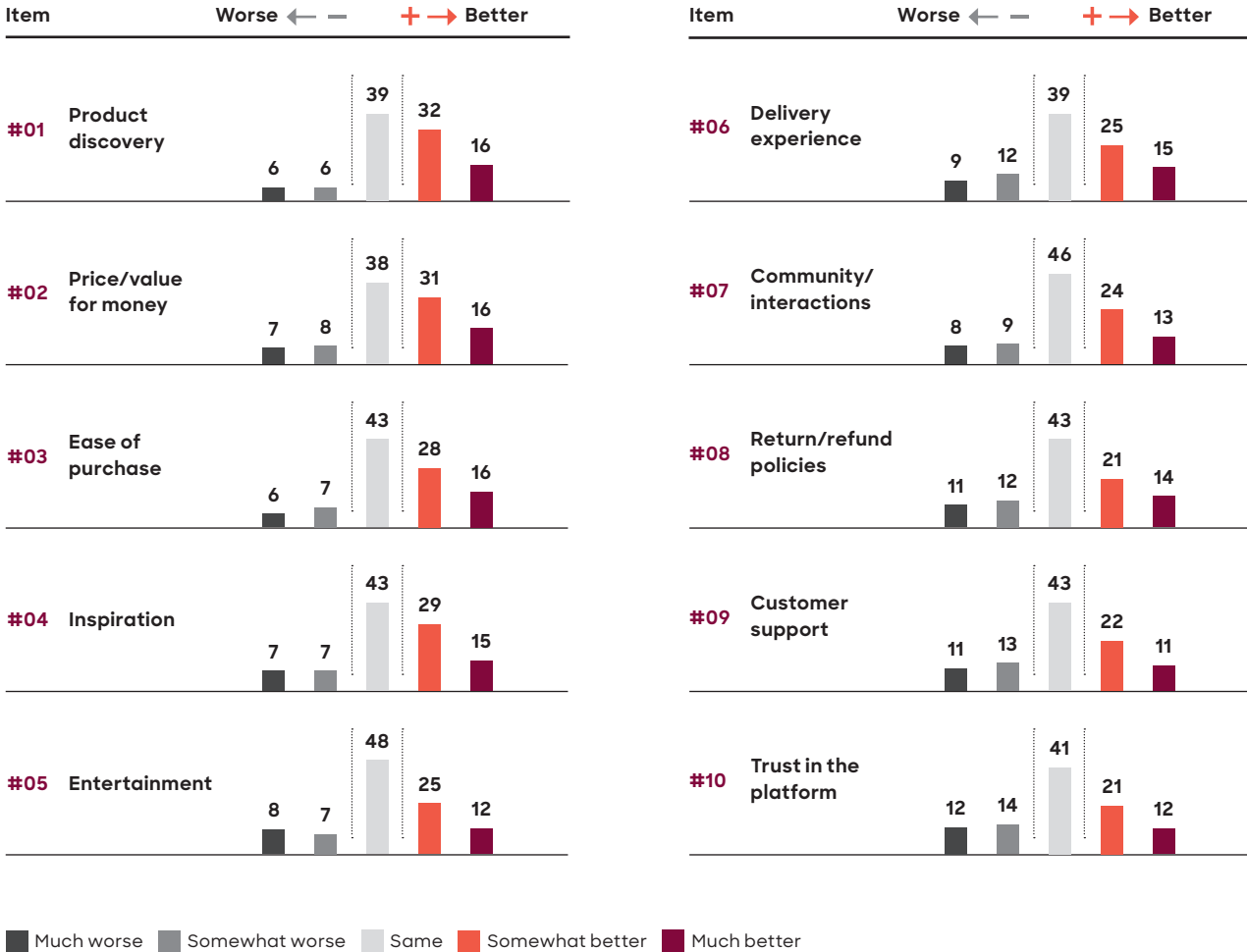
**New online platforms are capturing significant market share with engaging content**

Traditional online retailers, such as Zalando.com, are being challenged by new social commerce platforms, such as TikTok Shop and Temu. Consumers turn to these alternatives because it is easier to discover new products there than on traditional online platforms, according to 48% of respondents. The visually appealing, entertaining content that they offer in the form of videos and livestreams strongly engages consumers, allowing them to imagine using the products more easily. Furthermore, the content displayed is personalized, ensuring that consumers stay engaged for longer and find items that align with their previous shopping and browsing behavior. The price point is another key driver, with 47% of consumers more satisfied with the value for money offered by emerging platforms than by traditional online platforms. As consumers continue to seek value and new experiences, these platforms are well positioned to capture a growing share of the online shopping market.

New online platforms face a number of challenges, however, above all when it comes to trust. In this area, 26% of consumers report worse experiences than with traditional online platforms. Clearly, as novel players with little time as yet to establish brand reputation, the new platforms still need to build trust – although this could be challenging, as they offer products from a wide range of sellers with potentially lower benchmarks for quality control. The new platforms will therefore likely continue capitalizing on their low prices and product offering.

Almost 25% of consumers also report poorer experiences when it comes to customer support and return/refund processes. Rapid growth may make it difficult for the new platforms to scale their customer support services effectively; indeed, some do not offer proper support at all. Returns and refunds generally take longer than for traditional online players, and wrong deliveries are more likely, as logistics networks are not as well monitored. But despite these

**○ Regardless of whether you have personally used them or not, how do you rate the shopping experience on emerging online stores and social commerce platforms compared to traditional online shopping? [%]**



Total may not add up to 100% due to rounding

Source: Global consumer survey by Roland Berger and Potloc

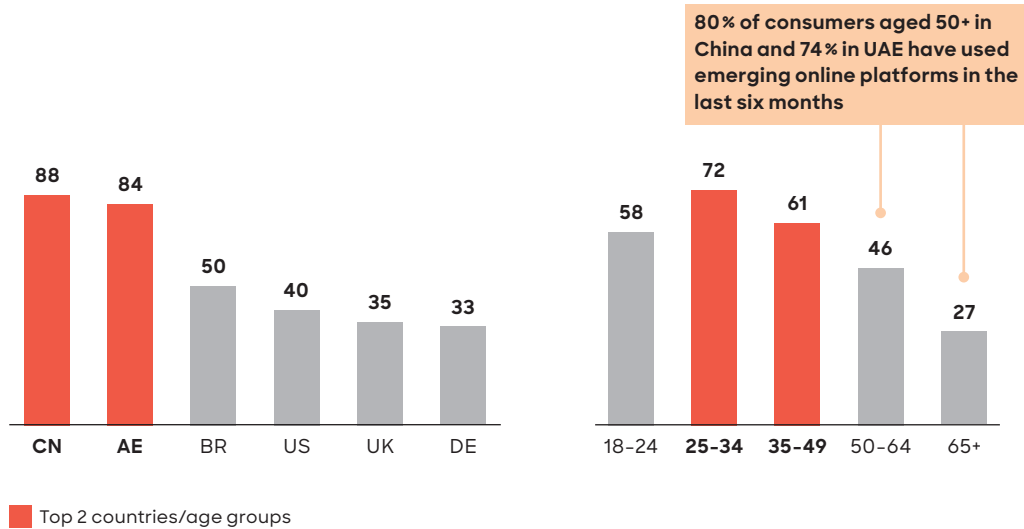
drawbacks, emerging online platforms do not have a single category in which their net score is worse than for traditional online shops. This implies that consumers will continue to explore this option - and could potentially tolerate some hiccups in return for the superior range, easy purchasing process and engaging experience they offer.

Adoption of emerging online platforms is subject to significant regional and generational differences. China (88%) and the UAE (84%) lead in terms of how many consumers use these platforms, driven by consumers aged 25-34 (72%), followed closely by the 35-49 age group (61%). By contrast, Western countries such as the United States (40%) and Germany (33%) lag behind. Notably, in China and the UAE, older demographics (50+) also exhibit strong adoption rates: As many as 80% of consumers in China and 74% in the UAE have used these platforms in the last six months. Emerging platforms are more prominent in younger, tech-savvy markets, while Western markets and older demographics still show potential for growth. ▶O▶P

**P Have you bought anything on an emerging online platform or social commerce store in the past 6 months? [%]**

By country

By age



Source: Global consumer survey by Roland Berger and Potloc

**Insight 7**

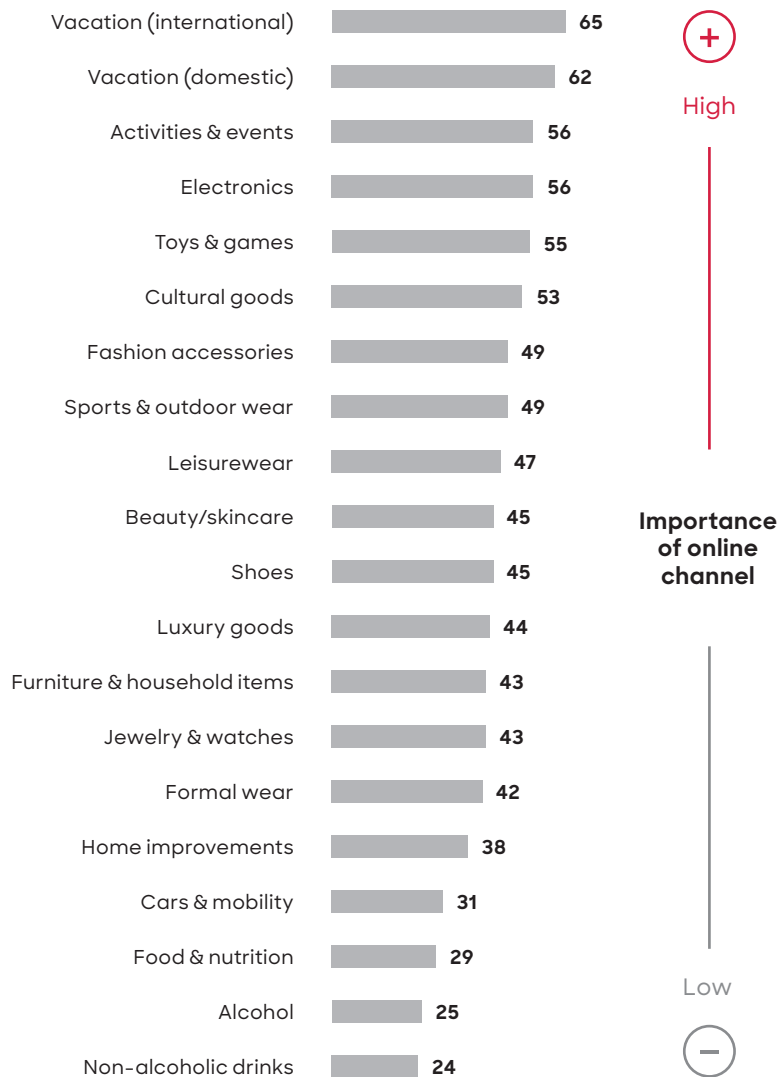
**Offline channels are most relevant for food and beverages, cars and home improvements**

Consumers buy products in certain categories mainly offline, specifically food and beverages (over 70%), cars (69%) and home improvement items (62%). There are several reasons for this. First, these products need to be experienced. Consumers also often require input from in-store experts when buying them. Thus, consumers want to check for quality or any defects before purchase, examining produce or test-driving vehicles. Physical shopping is also aligned with the global trend toward prioritizing quality experiences; it transforms the act of shopping into an engaging activity rather than merely a transactional process. In addition, food purchases are often driven by hunger or cravings, and offline shopping means that consumers' needs are met immediately.

Online channels, on the other hand, give consumers a chance to compare and consider. Our survey found a preference for shopping online when it comes to vacations (62-65%), activities and events (56%) and electronics (56%). Online platforms provide consumers with extensive access to information, including detailed product specifications, price comparisons and user-generated content such as reviews and ratings. This wealth of information empowers consumers to make well-informed decisions, particularly for subjective experiences, where personal preferences play a significant role. Online features such as algorithms and search suggestions provide the additional benefit of customization – something that physical channels can only match with difficulty. Consumers also appreciate the ability to finalize their purchases anywhere, anytime, which is increasingly relevant in a fast-paced world. ▶ Q



**Q** What percentage of your purchases do you typically make online vs. offline (i.e. in physical stores) for the following categories? [%]



Source: Global consumer survey by Roland Berger and Potloc

**// Best-in-class retailers excel in both the physical and online channels - offering the best of both worlds."**

**Richard Federowski, Partner**

# Five steps for success in 2025 and beyond

How retailers and brands can boost their resilience and stay competitive in a rapidly evolving market



By implementing the following five strategic actions, consumer and retail businesses can boost resilience and stay competitive in a rapidly evolving market.

## **1. Put customer loyalty and engagement center stage**

We encourage all types of consumer and retail businesses to make customer loyalty their top priority – remembering that acquiring new customers is five times as expensive as retaining existing ones. Various tactics exist for boosting customer loyalty, from introducing dynamic pricing to pursuing strong customer engagement strategies. Another key area that businesses should explore is hyper-personalized communication, for example, through new product introductions, tailored recommendations or exclusive promotions. This has been shown to drive repeat purchases and increase customer lifetime value.

## **2. Balance value and premium offerings**

Economic pressures are making affordability a top priority for consumers. However, many remain open to spending more on experiences in 2025, according to our survey. Consumer and retail businesses can exploit this opportunity by offering competitively priced essentials while at the same time curating premium experiences for aspirational buyers.

## **3. Embed sustainability in your value proposition**

Consumers care about sustainability. But in times of economic slowdown, they are not willing – or do not feel able – to compromise on price. How can retailers speak to their conflicting aspirations and limitations? We recommend addressing consumers' environmental concerns by integrating sustainability seamlessly into your offering, providing products that are not only sustainable but also compete on price.

## **4. Prepare and invest in channel upgrades**

Younger, tech-savvy consumers are driving a shift to social commerce, with emerging platforms such as TikTok Shop and Temu capturing significant market share. Traditional retailers must respond. One way to compete is to offer content-driven shopping experiences and immersive formats, such as live shopping. This approach can help you engage and convert consumers.

## **5. Continuously evolve – or risk irrelevance**

With consumers willing to trade down or switch brands to manage rising costs, consumer and retail businesses need to evolve. Stay static and you risk losing relevance in a fast-changing consumer and competitive landscape. We recommend evaluating and refining your offering in line with shifting consumer needs and market dynamics – not as a one-time effort, but on an ongoing basis.

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## Further reading

→ [DECODING CONSUMER BEHAVIOR - VOLUME 3](#)

→ [COMBATING WASTE IN FOOD AND FASHION](#)

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→ [UNRAVELING ASIA'S COMPLEX CONSUMER LANDSCAPE](#)

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**POTLOC** is the all-in survey platform designed for leading consulting and private equity firms to understand market shifts and drive high-speed, high-stakes decisions. With unrivaled data quality mechanisms, AI-powered analysis tools, and end-to-end support from market research experts, Potloc simplifies everything from survey creation to analysis. With hubs in New York, Paris, and Montreal, Potloc has supported 500+ global firms in collecting insights from B2C and B2B respondents across industries and geographies.

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