



Spotting the short and long-term effects of the Corona Crisis
on shoppers' behavior in France & Germany





Séissmograph annual report 2020 – Wave 1 / April-May 2020
Experimental qualitative study
conducted by Séissmo – Markt und Forschung

Why this Séissmograph – and what it is about

- Like any **crime scene**, the **retail space** (be it digital or physical) is a **microcosm indicative of what the population feels throughout all observable behaviors**
- It is our conviction that **analyzing shopping trips and their related mental processes** is not only crucial for retailers, but also for manufacturers and economic and political decision-makers, as it will **offer valuable indicators about the current mindset and predict the “new normal”**
- In our **first pilot interview**, it took the respondent **40 minutes to mention the items purchased** (and only after prompting by the moderator), as if they were mere **details compared with the whole purchase setting and experience**
- Furthermore, we wanted to dive into how the corona crisis situation impacts the **shopping experience, decision-making processes and trade-offs**



- 16 in-depth screen-to-screen cognitive interviews in April 2020 (the cognitive interview is a memory-enhancing technique for investigative interviewing; a scientific method from forensic research and criminal psychology)
- Conducted by our **senior moderators** via Skype; recorded, transcribed, fully anonymized, additionally analyzed through our AI-based NLP platform Synomia
- With **male and female shoppers**, aged 21 to 62, nationwide spread, who had been **grocery shopping** in the two weeks prior to the interview
- In a **supermarket** (premium, regular, organic) and/or a **discounter**
-  **Auchan, Intermarché, Carrefour, Leclerc, Grand Frais, Géant Casino**
-  **Edeka, Rewe, Real, Aldi, Lidl, Netto, Denn's**
- And showed some overall **concern** about the Corona crisis

Benchmarks: Shopping trips at food retailers in France/Switzerland/Germany in 2018 and 2019 via the same methodology. **TOTAL BASE OF 48 IN-DEPTH INTERVIEWS**




Each participant received a small gift consisting of two single-packed disposable masks.


Preliminary remark:

Grocery shopping is a valuable indicator of shoppers' new requirements in the global retail space and of the overall consumption climate

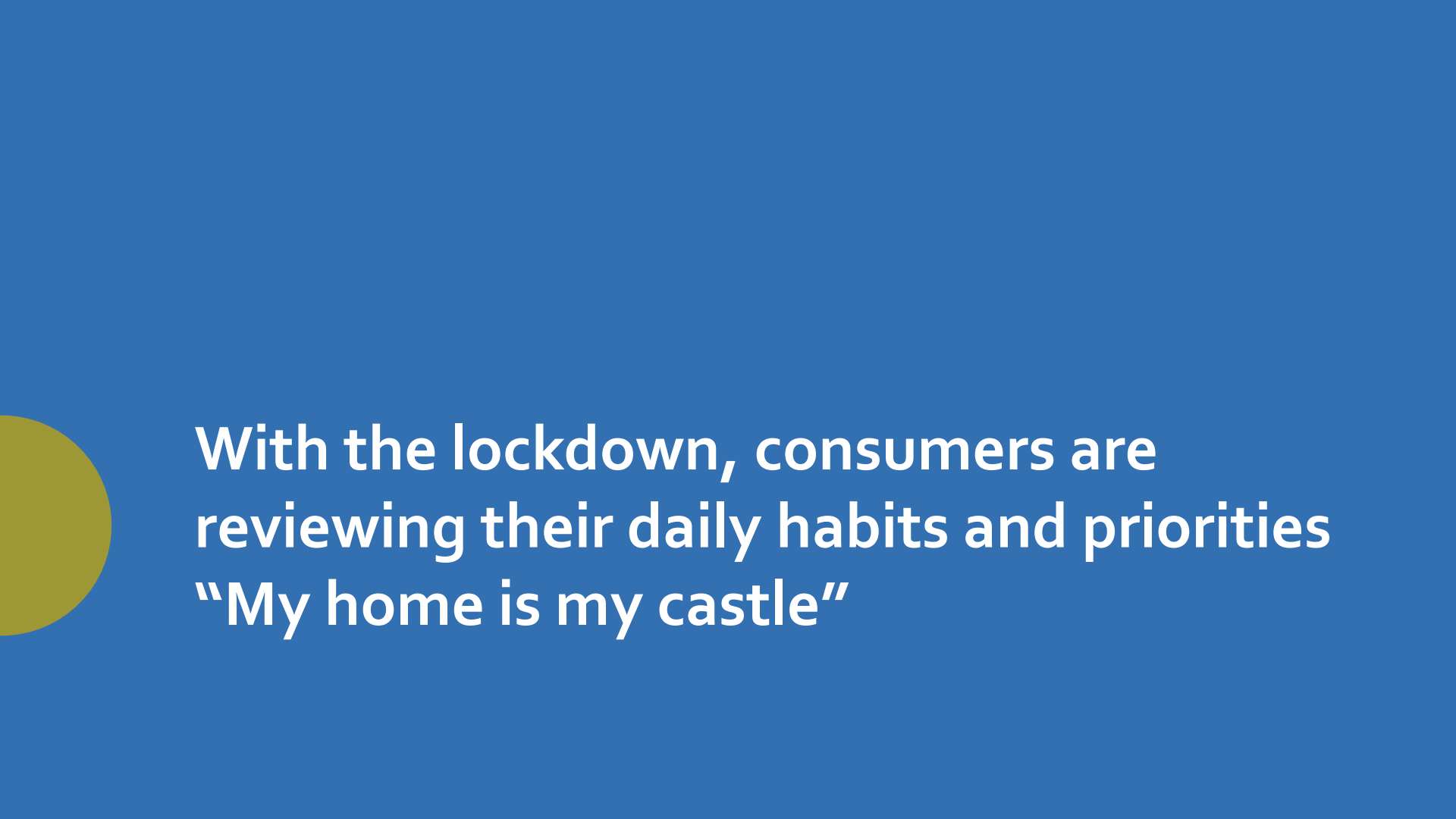
- ▶ The **level of stress and anxiety** resulting in physiological pain and cognitive **impairment** during grocery shopping has been **massively underestimated**
- ▶ Shoppers are **overwhelmed** by the situation. Retailers and manufacturers face **new requirements**:
 - ▶ **Retailers**: pro-active crisis management; visible and reassuring safety measures; management of shoppers' flow; reorganization of shelves (esp. produce); more service staff; promotion of local products; promotion of spacious and airy retail space
 - ▶ **Manufacturers and brands**: limitation of portfolio to ease choice/reduce complexity; stronger differentiation between SKUs at first glance; simple and clear packaging fronts; hygienic packaging
- ▶ **All stakeholders need to restore the shoppers' trust and peace of mind** in order to "make shopping great again"



▶ **Duty of care as a tool and opportunity to upgrade one's image**



▶ **'Less is more' as a chance to strengthen the brand core and the product identity**



With the lockdown, consumers are
reviewing their daily habits and priorities
“My home is my castle”

Life at home has changed with the lockdown: New daily life, new activities, new needs

- Increased household sizes (older children returning to their parents' home during the lockdown, sometimes even with their respective partner)
 - partially explaining the large shopping basket
 - also new habit of purchasing for the elderly/other households
- New activities at home which are mirrored in the respondents' purchases:



...c'est un moment où comme je suis beaucoup à l'appart, je m'aperçois des trucs à acheter et je prends le temps à Auchan d'aller voir ce qui nous manque

Maximilien, 32 





The shopping journey is impacted
by the fear of contamination

The fear of the virus has a strong impact on the shopping journey



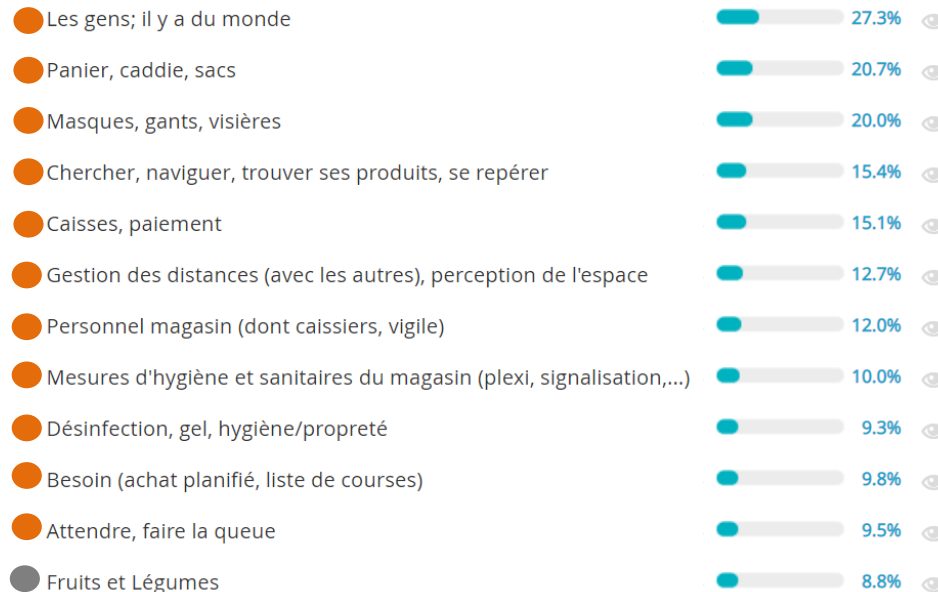
For the first time, shoppers talk more about the people surrounding them and the new procedure of shopping than about the products they buy

Verbatim base = 1 126
Key words base = 17 666

Food retail pre-Corona



Food retail Corona Phase I



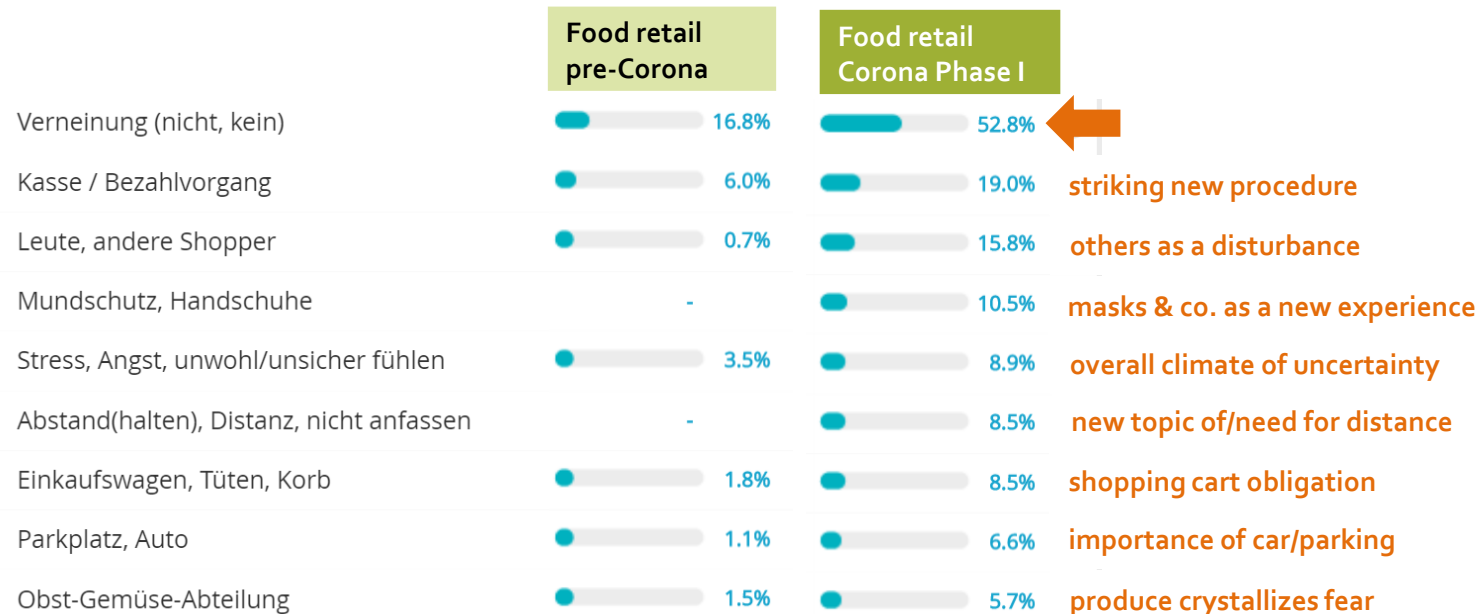
The first code about the items purchased (fruits & vegetables) ranks 12th!



AI has helped us to discover the power of negation


A weak signal that turns out to be THE indicator of the overall reluctant mood

Verbatim base = 1 587
Key words base = 6 975



Same phenomena as in France: the main topics are NOT about the items purchased but peripheral details





The first big change in shopping habits is the great amount of planning (and lack of spontaneity)

Consumers are changing their shopping habits

They go shopping less often and plan it carefully

- ▶ **Extreme degree of planning and anticipation:**
 - ▶ Preparing a complete list seems key
 - ▶ Low readiness to let oneself be “inspired” by the shop, resulting in less browsing/fewer spontaneous purchases
- ▶ **Lower frequency** (trying to fill the cupboards for the next 6 to 10 days)
- ▶ **Purchasing large quantities** for the own large household as well as for others (the elderly in particular) and in a mood of **not wanting to forget anything**
- ▶ **Change of visiting hours** in order to (hopefully) **meet fewer people** in the shop



Consumers are changing their shopping habits

They re-consider their relevant set of retailers, and build new preferences

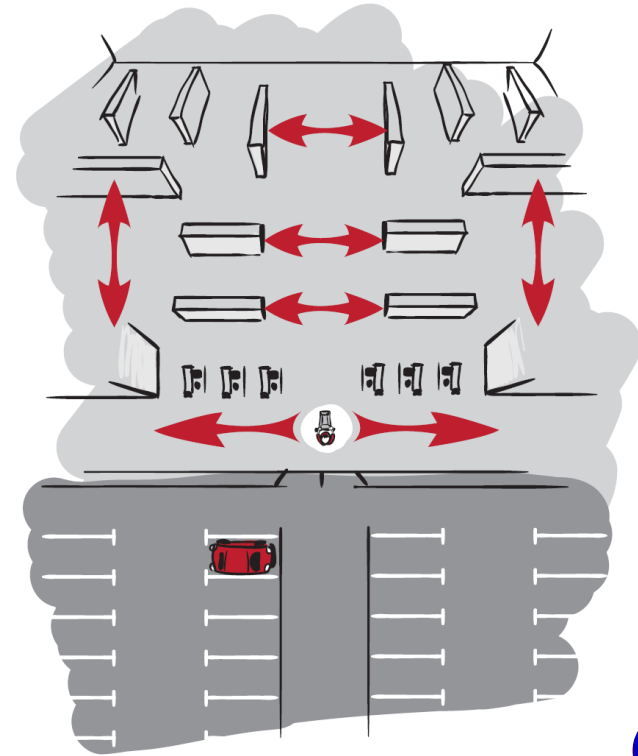
Constructional preconditions of the shop impact the shopping experience: shoppers feel more comfortable and safe in **spacious shops**

- Large parking lots
- Spacious aisles make it easy to keep the safety distance
- Shelves are not too high
- No displays are placed in the aisles
- Shorter queues at the entrance



...und grad bin ich ziemlich glücklich, dass es den Real gibt, weil es einfach riesige Parkplätze gibt und jeder einfach reinlaufen kann, weil dieser Laden einfach so gigantisch groß ist

Nicole, 29 



Consumers are changing their shopping habits

Men are involved in grocery shopping and ready to indulge themselves

More male shoppers:

- Many are working from home and/or partially jobless; less traveling
- Therefore have more time to shop and are almost happy to find a reason to leave the home
- Ready to indulge, less price-sensitive than women



From the movie „Pappa Ante Portas" with famous German comedian Loriot (a young pensioner discovers household management; image from a scene at the grocery store)

« ...normalement on dépense 300€ de courses par mois, là on est largement à plus du double, c'est une manière de se faire plaisir car il n'y a pas de sorties, pas de week-ends

Maximilien, 32 





**A shopping moment dominated by
fear & uncertainty**

"Hell is other people" (J.P. Sartre)

Fear of others, who appear like a direct threat of contamination



- Wish to avoid others and keep a safe distance
- Feeling of too many shoppers allowed to enter the shop
- Constant focus and attention on other people instead of the actual purchasing process
In the past, this didn't exist at all; shoppers would just mention the items, the price, the special offers, the deciding between two products...



...avec une dame, on s'est croisées, on s'est tellement écartées l'une de l'autre, ça m'a fait sourire tellement on faisait super gaffe. Dès qu'on croisait quelqu'un sans masque, on pensait à tous les microbes qui sont dans l'air

Martine, 47

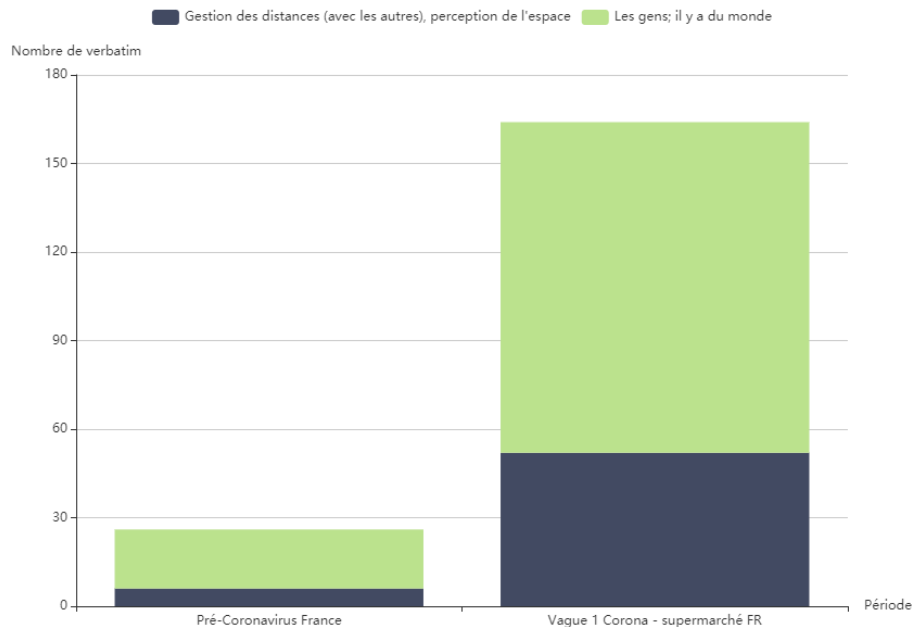


...wusste gar nicht, wie sie sich verhalten sollte und ich habe verständnisvoll zwei Meter Abstand gehalten und habe gesagt, „lassen Sie sich ruhig Zeit“. Alle sind gerade irgendwie verwirrt und ängstlich

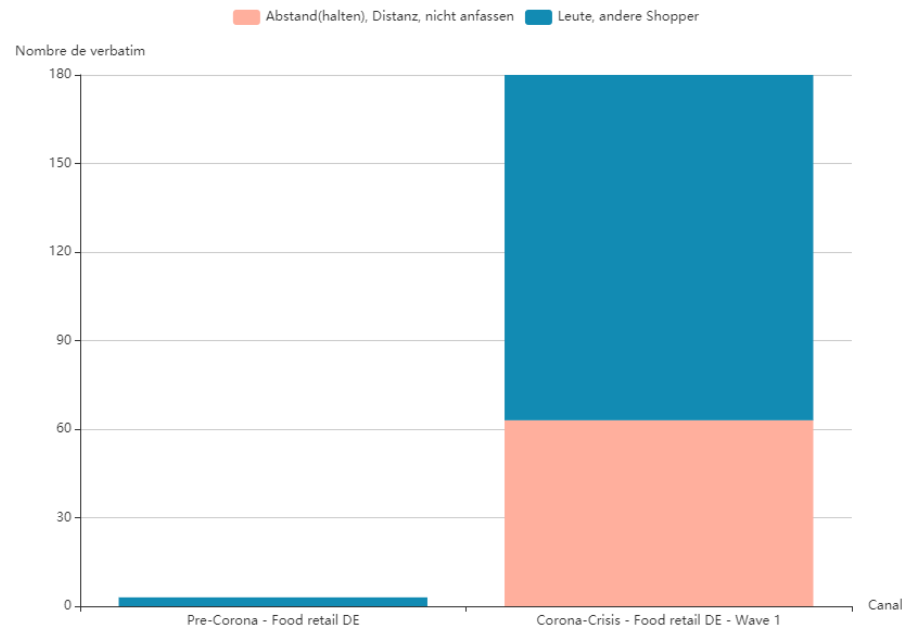
Frauke, 51



"Watching my back", the new to-do on the shopper's list "Give me some space", an old wish regaining momentum



Périmètre : 817 verbatim
 · Période = Pré-Coronavirus France, Vague 1 Corona - supermarché FR
 · Themes = Gestion des distances (avec les autres), perception de l'espace, Les gens; il y a du monde



Périmètre : 1194 verbatim
 · Themes = Abstand(halten), Distanz, nicht anfassen, Leute, andere Shopper
 · Canal = Corona-Crisis - Food retail DE - Wave 1, Pre-Corona - Food retail DE

Fear of (touching, purchasing) possibly contaminated items

Packaged goods reassure shoppers

- **Fear of touching any possibly contaminated item**
(first time emergence of the key word “**to touch**” in the new corpus)
- **“Hardware”**: shopping carts, baskets, credit card device to enter one’s pin...
- **“Software”**: the **fresh fruit/vegetables area is particularly sensitive**.
The perceived hygiene is questioned. Seeing people touching the items (without gloves) and then leaving them there can cause feelings of **disgust**
- **Packaging** returns to its **original mission: TO PROTECT**

« ...ce qui m’énerve dans ce rayon, c’est les gens qui se servent et qui n’ont pas de gants... y a des gens qui reposent en plus, qui prennent le melon, le sentent, il plait pas et hop Maximilien, 32



« ...aber da stand eine Dame, ich schätze mal, so drei Minuten, und hat in diesen drei Minuten vielleicht 10 Zucchini angefasst und wieder liegen lassen und keine mitgenommen Carolina, 62



Supermarkets have become a worrying environment

An apocalypse atmosphere

► Fear created by the atmosphere in the shop: worrying environment

- Masks and gloves (shoppers, cashier)
- People at the checkout behind plexiglass, etc.
- Audio messages repeating the safety rules (instead of playing music)
- Other shops (in malls) are closed, with no lights, no people, no music



...la galerie était éteinte, tous les magasins sont fermés, l'ambiance est assez particulière, il n'y a pas de musique, il y a une voix au micro qui donne des conseils de gestes barrière, ça remet un coup de tension, j'ai envie d'aller vite

Jessica, 36 



...manche Leute haben ja auch diese fiesen OP-Masken, oder was das ist, diese aus Plastik. Und das finde ich wirklich gar nicht mehr gut, das ist mir zu ..., das macht mir zu viel Furcht

Julia, 60 

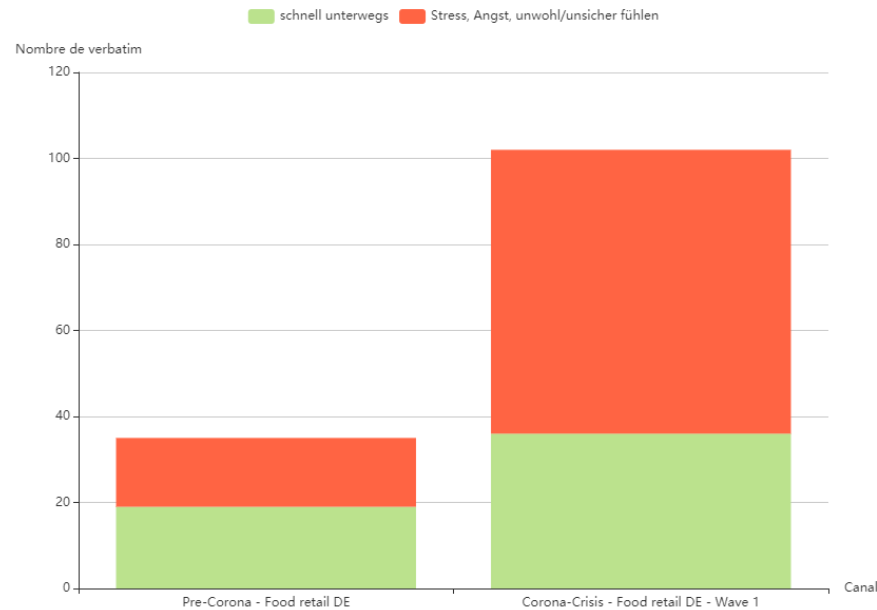


Supermarkets have become a worrying environment

Shoppers are in a hurry and perceive their trip as a chore



Périmètre : 817 verbatim
 - Période = Pré-Coronavirus France, Vague 1 Corona - supermarché FR
 - Themes = Aller vite, être pressé de terminer,angoisse, peur, Confinement, attestation, Stress, tension



Périmètre : 1194 verbatim
 - Themes = Stress, Angst, unwohl/unsicher fühlen, schnell unterwegs
 - Canal = Corona-Crisis - Food retail DE - Wave 1, Pre-Corona - Food retail DE

Supermarkets have become a worrying environment

What is the new shopper codex?

- Uncertainties about **how to behave “correctly”** are noticeable
 - New questioning from shoppers who need guidance and clear instructions:
What is allowed (to do, to touch), what is not, who is there to give (friendly) advice?
 - New processes emerging at the checkout: e.g. proceeding with more care and a structure on how to distribute the items in order to put similar items together and to ease the “decontamination” process afterwards
 - Fear when nothing is implemented to ensure safety or keeping the distance





A shopping moment punctuated
by frustration

A succession of unusual frustrations

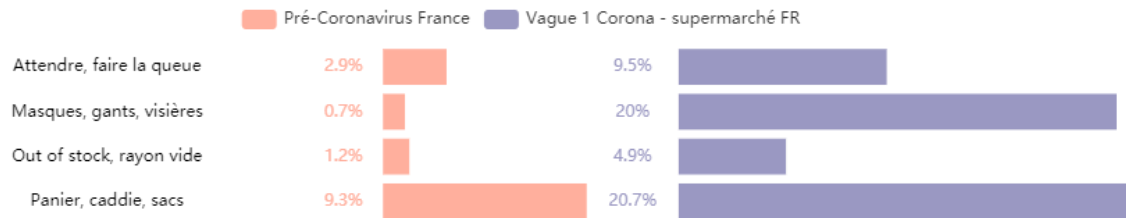
Discouragingly long queues

- in front of the shops
- inside at the fresh fruit/vegetable and meat/cheese counters

Gloves create difficult handling (bags, wallet, credit card) **and sweating; breathing is difficult** (masks); **heavy carts** to push and navigate (with frequent obligation to take one)

Out-of-stocks

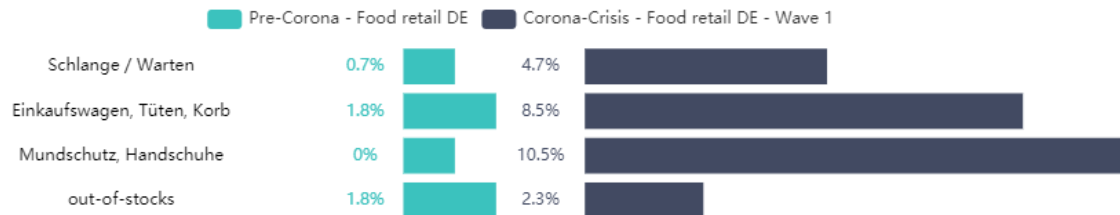
- **Food:** eggs, flour, butter, pasta, ready-to-use doughs, toast bread, burger bread, ...
- **Non-food:** detergents, disinfectant and cleaning products, gloves, toilet paper, ...



Périmètre : 817 verbatim

• Période = Pré-Coronavirus France, Vague 1 Corona - supermarché FR

• Themes = Attendre, faire la queue, Masques, gants, visières, Out of stock, rayon vide, Panier, caddie, sacs



Périmètre : 1194 verbatim

• Canal = Corona-Crisis - Food retail DE - Wave 1, Pre-Corona - Food retail DE

• Themes = Einkaufswagen, Tüten, Korb, Mundschutz, Handschuhe, Schlange / Warten, out-of-stocks

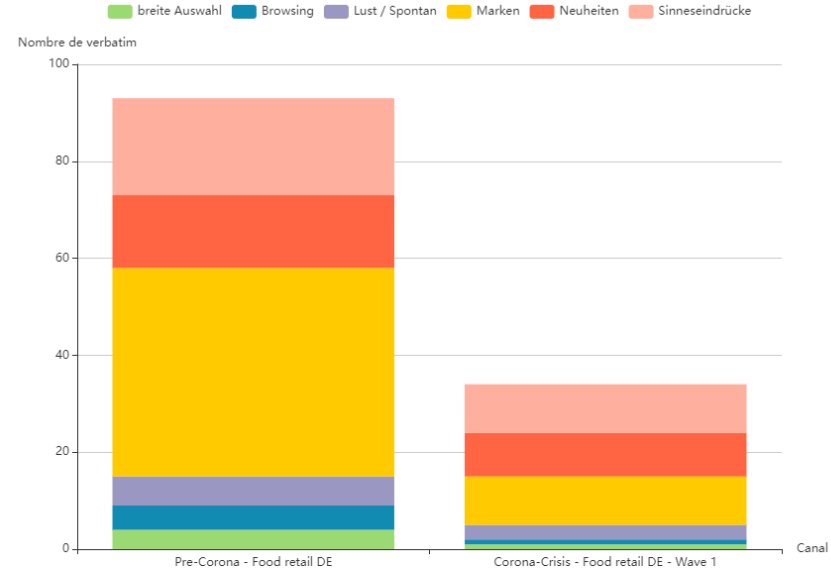


Shoppers struggle with
their cognitive processes

Cognitive processing is more difficult in a context of fear and stress

Decision-making is strongly affected

- **Feeling oppressed, anxious, depressed** causes twofold effects:
 - **Physiological reactions**
i.e. sweating, breathing with difficulty behind the mask, lack of oxygen, dizziness...
 - **Impaired cognitive processing**
limited capacity to understand, notice, concentrate, remember and locate products; limited ability to spot differences between various products; **drastically reduced "share of attention"** with regard to choice, brands, product novelties, sensory cues
- Since shoppers **hurry to reduce the duration of the stay** inside the shop and limit their browsing, this **affects the decision-making process**
- **Very quick decision-making**, least cognitive effort possible, less patience to find a product that is not immediately visible/within reach



Pärimètre : 1194 verbatim
• Canal • Corona-Crisis - Food retail DE - Wave 1, Pre-Corona - Food retail DE
• Themes • Browsing, Lust / Spontan, Marken, Neuheiten, Sinneseindrücke, breite Auswahl

Shopping has become a stressful obstacle race

The new slalom behaviour shows shoppers deviating from their usual route

- Shopping has become an **obstacle race**: slalom, shortcuts to avoid other shoppers
- Switching to another aisle, against the usual script**, which puts shoppers in a situation of constant pressure to check whether they have forgotten anything
- Jumping to a free cashier** when it is “uncrowded”



...je passais dans le rayon d'à côté pour ne pas croiser les gens, au sein de notre cheminement, on est parfois dévié parce qu'on va croiser une personne



Magali, 40



...hat man halt diesen Slalomlauf dann und muss öfter mal warten und kann halt nicht direkt weitergehen. Die haben breitere Gänge, um einiges breitere Gänge, aber dadurch haben sie diese Bauten mittendrinne, was im Normalfall ja kein Problem ist, aber momentan schwierig

Daniela, 28





To a certain extent, grocery shopping
is an occasion to socialize
and indulge

Grocery shopping is a way to socialize during lockdown

On the longer term, grocery items regain psychological value

Short-term effect during lockdown/as long as not all shops are open

- **An excursion: THE occasion to go out**, to see people (especially in France, where the lockdown was much stricter)

Long-term value shift: from functional food intake to valuable food

- **Readiness to spend more money on groceries**, because other spending accounts are not possible (no restaurants, no entertainment, no travel, no leisure)
- **Rewarding** oneself with premium food & drinks and premium brands
- Some authorized **craving** for chocolate, wine/alcohol, ice cream, ...



...quand je suis au rayon yaourts, j'ai tendance à prendre des marques car ça me fait plaisir, c'est l'occasion comme on n'a pas de dépense particulière à côté. C'est la sortie du moment, THE sortie

Maximilien, 32 





New post-shopping rituals

Post-shopping decontamination (mainly in France)

- **Washing hands first**
- **Washing & rinsing purchased items** (fresh products, plastic packaging such as yoghurt, chips bags ...)
- **Leaving the items, shopping bags, papers outside (in the sun) for decontamination...**



...hormis le frais que j'ai désinfecté avec des lingettes désinfectantes, tout le reste est resté sur la terrasse pendant 4h, on a rangé les courses dans le placard 4h après

Valérie, 50



...je remets les gants, je sors ma Javel, le torchon que j'ai dédié à ça, et je nettoie le moindre paquet de tout, tout, tout. Les fruits et légumes, je fais couler de l'eau savonneuse dans l'évier, je jette tous les fruits et légumes dedans. J'enlève sur la terrasse tous les cartons, ce qui peut rester dehors reste dehors, ce qui doit être rentré je mets au frigo

Magali, 40





How the shopping experience impacts the retailer image

How shoppers perceive the crisis management of the classic food retailers: Pleasant pre-conditions with the large size & space, but still no feeling of well-being



- More space. Bigger parking lots and wider shop layout to keep the **safety distance**
- Short or no **waiting** time to enter the shop
- More **safety measures** than required by law



- Fruit and vegetables** are still being **directly** touched by other shoppers
- Some **queues** and (over)crowding at specific points like **fresh food counters** and **checkouts**
- Staff** not always following regulations of **wearing masks or gloves**

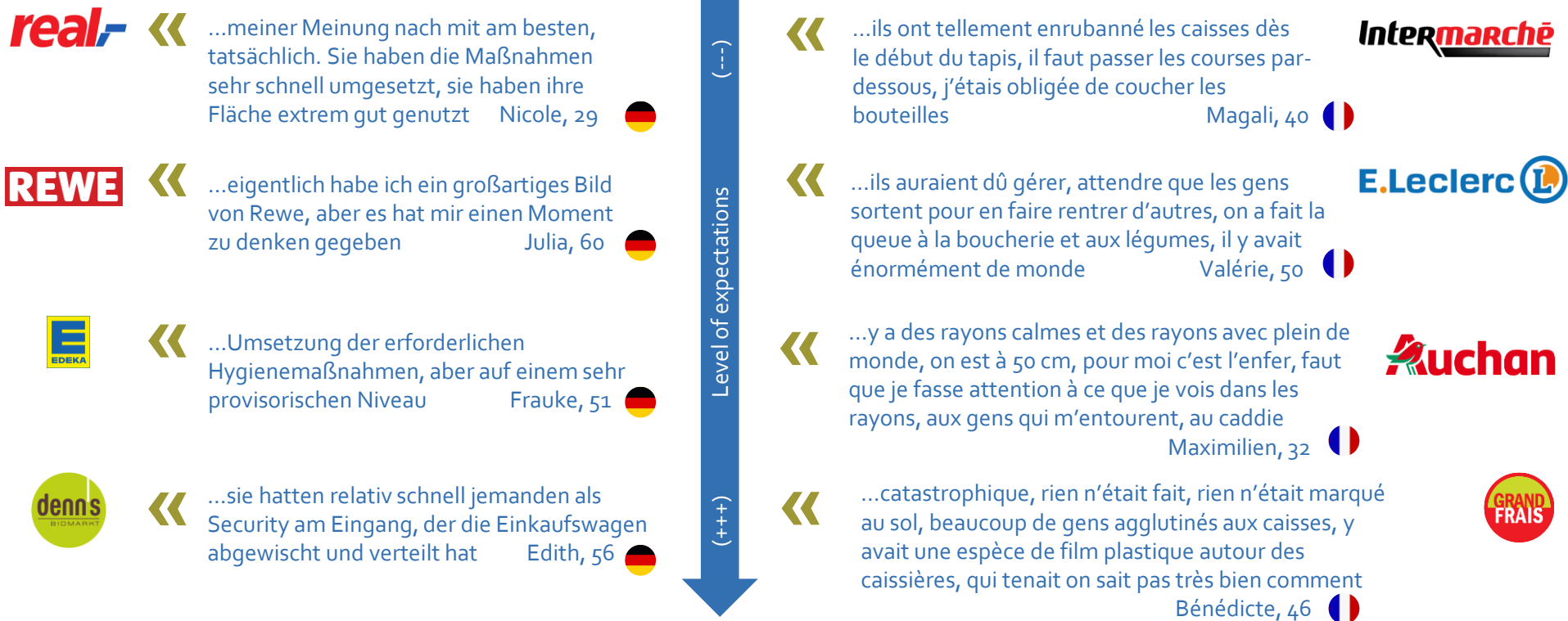


Impact on the image

- The shoppers' desire for **larger spaces** has created an **opportunity** to enhance the **brand image**, but it appears widely **under-used**
- Expectations** towards classic retailers are much **higher** than towards discounters, and **correlate with the perceived positioning** (i.e. premium retailers must set the highest standards). **Exemplary and polite behaviour** of the employees is **expected** in the stores!
- The right **mix** and **organization** of the **safety measures** can have a positive **long-lasting impact** on the image



How shoppers perceive the crisis management of the classic food retailers: Pleasant pre-conditions with the large size & space, but still no feeling of well-being



How shoppers perceive the crisis management of the discounters:

Tactical problem-solvers who missed an opportunity to upgrade their image



- ▶ **Security staff controlling** the entrance and maintaining the maximum allowed number of customers in the shops
- ▶ **Forced safety distance** due to the obligation of shopping cart usage
- ▶ **Safety measures** installed at the **checkout**



- ▶ **Long queues** in front of the shops make customers **refrain** from visiting
- ▶ **Employees** don't follow the guidelines: **not wearing masks or gloves**, only rudimentary politeness
- ▶ The **shop layout** is not very spacious making it **difficult to keep the safety distance**



Impact on the image

- ▶ Shoppers observe that the discounters follow a "minimum required policy": the **minimum standard of security, as required by the law**
- ▶ **Shoppers did not expect more** – thus they feel confirmed in the current image they have of the discounters
- ▶ The **behaviour of employees** (entrance, restocking and checkout) who seem **stressed** and even **impolite** has actually **worsened the image** of the visited shops




How shoppers perceive the crisis management of the discounters:

Tactical problem-solvers who missed an opportunity to upgrade their image




...das passt zu dem Image von Aldi, dass etwas vergriffen ist... es gab zwar das Plexiglas, aber das Personal hat keine Masken getragen. Ich störe mich an den Abläufen, gerade dem fehlenden Auslaufband an der Kasse

Daniela, 28 




...also ich finde, da ist eine Inkonsistenz.... Das hätte Lidl, glaube ich, besser machen können

Marianne, 61 



...sie haben alle Maßnahmen erst zum Schluss umgesetzt, als es praktisch schon gesetzlich vorgegeben wurde... Ansonsten hat sich tatsächlich wirklich nichts verändert. Es ist lustigerweise der größte Eindruck von Normalität, den man beim Einkaufen haben kann

Nicole, 29 



The French click and collect system “Drive” has gained momentum during these times of social distancing

- **“DRIVE” purchases** (a kind of *click and collect system*, pre-ordering and driving by in one’s car to get the trunk loaded with the pre-order) are **exploding**, but classic retailers’ e-commerce **isn’t meeting the demand**, so people have to switch to the physical store. This reflects negatively on the retailers’ image.

« ... maintenant le site du drive est tellement inaccessible, il n’y a rien du tout, il n’y a pas de produits frais ou de première nécessité. Y a des chocolats, des shampoings, mais pas de beurre, de farine, de viande, de légumes et je trouve ça vraiment dommage qu’ils ne mettent pas plus en avant le drive. Ils mettent le maximum dans le magasin, le drive ne fonctionne pas bien . Personnellement je préférerais aller au drive plutôt que d’aller me promener dans les magasins, c’est pas rassurant du tout

Martine, 47 





Summary: psychology in France & Germany during the lockdown is mirrored in shopping behavior

(Grocery) shopping reveals how a whole society feels



Extreme fear spread among citizens (under the effect of the political discourse, using war metaphors) and **coercive measures** (written authorization, limited perimeters)

- ▶ Shopping trips are highly planned and anticipated (reluctance to go shopping)
- ▶ Frequency of visits reduced to as few as possible
- ▶ Length of stay reduced to the shopping list
- ▶ Extreme sensitivity to the retailers' measures re. disinfection and protection of staff
- ▶ Extensive measures taken at home to decontaminate the items; produce and packaging undergo a tiring cleaning procedure



Relative freedom of movement during the confinement phase; climate of self-responsibility

- ▶ Change of habits among German shoppers who are usually small-batch buyers and frequent visitors. They think twice about going shopping: more planning, lower frequency, less pleasure found in the act of shopping
- ▶ Shift to digital (contact-free) payment (in a country with a true cash culture)
- ▶ Concerns about the 'right' behavior to adopt in the shop and the 'touchy' zones; need for guidance and rules
- ▶ Expectation of structurally and durably implemented strategies by the retailers



Learnings for manufacturers

Some learnings for manufacturers

- D **Differentiation between products of a range is of paramount importance**, allowing for easy **navigation**, very **fast recognition** and consequently **error-free choice**
- D **Packaging has a new role**: back to its original/primary function of “protection”
 - D Should be **robust** and **airtight**
 - D If it **risks being affected by disinfectants**, washing, soaking, exposure to the sun, etc., think of **informing/labeling it** (encourage or discourage use, depending on material)
 - D Shoppers still aspire to **more sustainable consumption**, but plastic bashing has been tempered. Instead, **purchases of 'loose'/unpacked products have decreased**, with customers now doubting their safety
- D Frame all your upcoming **product innovations/new launches** in a context of **extreme competition** (consequence of the low share of attention), so be **stricter on your KPIs** such as impact, recognition and comprehension
- D **Don't go for complicated things; aim for familiarity instead** (well-known ingredients, easy handling). Shoppers/consumers are not in an experimental mood – but this will return!



Learnings for retailers

Ideas/recommendations to implement in the shop which will be rewarded by the shoppers!

► Manage queues to look short and not boring

- inform via displays about the number of minutes until the “ride” starts!
- install a webcam so shoppers can check prior to their purchase when the shop is less full

► Arrange for welcome rituals

- demonstrative cleaning of carts, personal greetings, effortless return of carts, etc.

► Install a code of conduct to instruct about “good behavior”

- implement rules that are simple, understandable and uniform across the shops
- what am I allowed to touch, review self-service vs. helping staff

► Reorganize space

- create large aisles, airy design

► Redesign the fruit & vegetable area (or any “touchy” zone)

- more guidance, more hygiene

► No anxiety-raising messages in the background

- go instead for relaxing music and – why not? – aromatherapy

► Include the hygiene/protection measures as structural in your shop identity and brand them as your own invention

- e.g. built by local craftsmen and/or manufacturers; use of recycled materials
- design/brand your own face masks

► Increase training of workforce to “stay in touch”

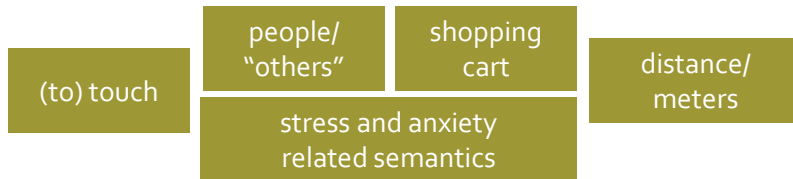
- friendly & warm words; greetings at the shop entrance, inside the shop, at the checkout



**Detecting the new normal:
we suggest a framework of early
indicators worth tracking**

Potentially “new normal” revealing early indicators in shopper verbatim in the context of cognitive interviews (open-ended, narrative)

- **Watch the start and end point of the shopping trips** in the shoppers' stories: the more it starts long before entering the shop, the less we are close to normal. The more it ends long after leaving the shop (like driving back, unpacking at home), the less normal.
- **Occurrence/frequency/intensity of the new (abnormal) key words** such as



- Intensity/importance of **negation/negatively phrased expressions**, indicating the overall **reluctant mood**
- **Overall quantity of verbatim**: the more normality, the less respondents talk, because they feel there is nothing particular or extraordinary to mention. In fact, within a same interview time frame, we have obtained significantly longer transcripts during corona times versus before.

- **Breadth of vocabulary**: when things are different, unusual, they call for new words, rich adjectives & verbs. Going back to normal should correlate with more standardized and repetitive wording
- Mention of **obvious stigmas** from the lockdown phase (abnormal): out-of-stocks, masks, gloves, ...
- Respective **weight of tangible items** purchased (normal) **versus decorum/ambience/atmosphere/procedure** (abnormal)
- Mention of prices in terms of **ability to remember price tags/amounts** in local currency (normal)
- **Ability to spot novelties/new products and pay attention to claims on packaging** as an indicator of a lower stress level and optimized cognitive process (normal)
- Mention of **“superfluous items/luxury features”** (normal): color cosmetics, organic, vegetarian/vegan/lactose-free, ...



Thank you for your attention

Our next wave is planned for June/July 2020. If you are interested in receiving first-hand insights and/or wish for a customized and detailed presentation, please contact us!

contact@seissmo.com +49 (0) 621 762 123 0