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FORMATION OF MODELS OF CONSUMER EXPERIENCE IN THE FOOD MARKET IN THE FACE OF NEW CHALLENGES

The article substantiates that the formation of consumer experience in the food market is influenced by megatrends that determine technological and socio-economic changes in consumer behavior, shopping processes, and perceptions of the consumer value of the product. The aim of the article is to study the food business and FMCG-industry active use of monitoring practices and trend watching to actively influence consumer behavior, draw attention to their products, shape the range in accordance with market needs, and also to stimulate sales of products, using not only price levers, but also to introduce modern communication technologies, that form consumer loyalty.

The key challenges for the development of the food market were the digital transformation, the availability of greenwashing, the strengthening of the value of conscious consumption, and the COVID-19 pandemic. Consumer experience covers all aspects of the company's offer – price, quality customer service, safeness, communications, packaging, product and service features, ease of use, and reliability. The COVID-19 pandemic has accelerated digital behavior in emerging markets, with new users gaining digital experience and overcoming obstacles by trying digital transactions and forming new habits. The cascade of transformations has led to the emergence of new values of life, consumer demands on the product, brand transparency, and the model of «home economy». Comfort, naturalness, well-being, and satisfaction as a way of life with a predominance of physical and mental health have determined the directions of consumer patterns focused on functional demand, convenience, and time savings.

It is proved that the formation of a positive consumer experience is gaining significant scientific and practical interest, especially in connection with the rapid development of digital technologies. The article reflects the influence of a number of factors on consumer experience: technological factors, infrastructural factors; government regulation; economic and sociocultural factors. Each of the identified factors is in the range of key triggers of consumer behavior, described by a triad of SoLoMo: Social, Local and Mobile. In the new post-quarantine world, there are significant similarities between Eastern European countries in consumer behavior patterns.

Keywords: consumer experience, food market, consumer value, customer orientation, consumer behavior, FMCG-industry.

Formulation of the problem. The main principle of any modern company in competitive markets is customer focus. Customer orientation involves the maximum customization of the product, personalization of interaction, building a product strategy around the needs and values of the customer. Customer orientation is based on the category of consumer experience.

Analysis of basic research and publications. Consumer experience and consumer behavior are closely related. The issues of changes in consumer behavior in the food market of Eastern European countries are given a lot of attention in the works (J. Szwacka-Mokrzycka[1]) large research companies: Nielsen, GfK,

[1] Szwacka-Mokrzycka, J. (2015). Trends in consumer behaviour changes. *Overview of concepts. Acta Sci. Pol., Oeconomia, 14 (3)*, 149-156.

Euromonitor International, PwC and others pay close attention to this issue. Consumer experience is a key concept of marketing and business practices. In recent years, there has been a growing number of researches on this topic: B. J. Pine and J. H. Gilmore[1]; C. Homburg[2]; K. N. Lemon and P. C. Verhoef[3]; C. Meyer and A. Schwager[4]; D. Chaney[5]; A. Kranzbühler[6], as well as research papers on customer experience in the context of retail services (V. Kumar[7], P. C. Verhoef[8]), or customer life (K. Heinonen[9], E. Vasileva and D. Ivanova[10]). Conceptual backgrounds are collected in E. Jaakkola[11], L. Becker and E. Jaakkola[12].

Changes in the markets are influenced by a cascade of trends that act as forces that change the business landscape. Megatends reflect major social, economic, political, environmental, technological changes that are formed slowly, but have a radical impact, leading to structural changes in various activities, processes and ideas. According to Nielsen[13], consumers expect the latest technologies to reduce prices and stocks by 89%, to reduce the time for the shopping process by 68%.

Formulation of the goals of the article. In conditions of high level of competition in the food market, food companies are experiencing problems with the sale of products, because their products have a limited shelf life, so they spoil quickly. This increases the economic risks of its production and sale. In order to gain a competitive advantage, food companies use food marketing tools. All tools are based on tracking changes in the behavior of food consumers. The aim of the article is to study the food business and FMCG-industry active use of monitoring practices and trend watching to actively influence consumer behavior, draw attention to their products, shape the range in accordance with market needs and also to stimulate sales of products, using not only price levers, but also to introduce modern communication technologies, that form consumer loyalty.

Description of the main research material. Food-marketing unites all value chains in stages from growing and processing of food raw materials to consumption of food products. J. L. Pomeranz and S. Adler[14] define food-marketing as a chain of marketing actions that are carried out in all parts of the food system between food businesses and consumers. Numerous processes and many organizations are involved in the sale of even one food product. Globally, the food industry is one of the largest employers, as it creates a great demand for specialists in this field. The studies by these authors Pomeranz and S. Adler show that about fifty-six organizations are involved in the manufacture of one can of chicken soup with noodles. These include not only processors who produce ingredients for the product, but also companies that produce containers, print labels, etc.

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[2] Homburg, C., Jozie, D., Kuehnl, C. (2015). Customer experience management: toward implementing an evolving marketing concept. *Journal of the Academy of Marketing Science*, *45 (3)*, 377-401.

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[11] Jaakkola, E., Helkkula, A., Aarikka-Stenroos, L. (2015). Service experience co-creation: conceptualization, implications, and future research directions. *Journal of Service Management, 26 (2)*, 182-205.

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Considering the food market as a system of relations between sellers and buyers, transaction flows between entities are conditionally represented: B2B – business market, B2C and C2C – consumer market. In the B2B («business to business») market, agricultural products are raw materials for the processing industry, so companies, carrying out marketing activities, use industrial marketing technologies. When selling agricultural products and processed products on the B2C (business-to-consumer) market, the marketing policy of both agricultural and processing, as well as trade enterprises is aimed at end consumers, which is the subject of our study. A characteristic feature of the C2C market («consumer-to-consumer») are transactions between households, population, sales of so-called domestic products, as well as the presence of non-market transactions within household consumption[1].

The markets, where interaction with food end consumers is at the core, require businesses to understand consumer needs in general and specific consumer targets. Consumer experience is interpreted by us as a set of processes of consumer interaction with the company, its services, resulting in impressions that form behavioral and emotional loyalty. The formation of a positive consumer experience is gaining significant scientific and practical interest, especially in connection with the rapid development of digital technologies.

The center of Fig. 1 shows a diagram of the impact on CX – consumer experience, a number of factors: T – technological factors (Technology), I –infrastructure factors (infrastructure); G – government regulation (Government); E – economic (Economics) and S – socio-cultural factors (Social). Each of the identified factors is in the range of key triggers of consumer behavior, described by the famous triad of SoLoMo: Social, Local and Mobile.

Technological factors at the present stage of civilization have a decisive influence on all aspects of life. Smart technologies, artificial intelligence, augmented and mixed reality have changed the process of consumer choice and the consumer pattern itself. In particular, the mechanism of content consumption and interaction with brands. Accordingly, both brands and their customers found themselves in the embrace of omnichannel interaction, which erased the boundaries of the physical and digital worlds. Phygital technologies – the combination of digital technologies (Digital) and personal communication with the consumer (Physical) by creating interaction between brands and consumers through physical and digital channels helped to identify and meet human needs[2].

The consumer has a global choice, being anywhere in the world, can choose the product he considers the best, regardless of the country of manufacture and its location. It has unlimited time (round the clock) access, personalized service, which determines the improvement of its quality, delivery of goods at a convenient time and place, a variety of forms of payment and also an opportunity to freely exchange information about goods, trade enterprises and quality of service with other buyers thanks to communication in social networks on forums[3].

Economic factors (E): the stability of the purchasing power of the population, the share of the middle class, the level of income differentiation, the dynamics of savings, unemployment, in general, economic activity significantly affect changes in consumer demand and consumer behavior. In addition to macroeconomic factors, economic processes in the regional and global economy, as well as new challenges related to the prevalence of the COVID-19 pandemic, have a significant impact[4].

With modern methods of competition, the focus is shifted to the retention of the client by determining his individual preferences, establishing long-term relationships, the formation of new value proposals. Socio-cultural factors (S) influence the formation of the institutional environment of human life. The level of trust directly determines the pace and opportunities for innovation in the economy, as well as the motivation of economic agents. Trust as a socio-psychological factor influences consumer choice.

Factors related to the influence of state regulation (G) in the field of acquiring (payment by payment cards), tax regulation of e-retail and retail trade, legal protection of economic activity, development of modern trade standards are external forces that significantly affect retail, acting as a driver or barrier to its development.

[1] Савицька, Н. Л., Афанасьєва, О. П.(2017). *Маркетингова політика підприємств на вітчизняному ринку м'яса та м'ясопродуктів*. Харків: Видавництво Іванченка І. С., 344.
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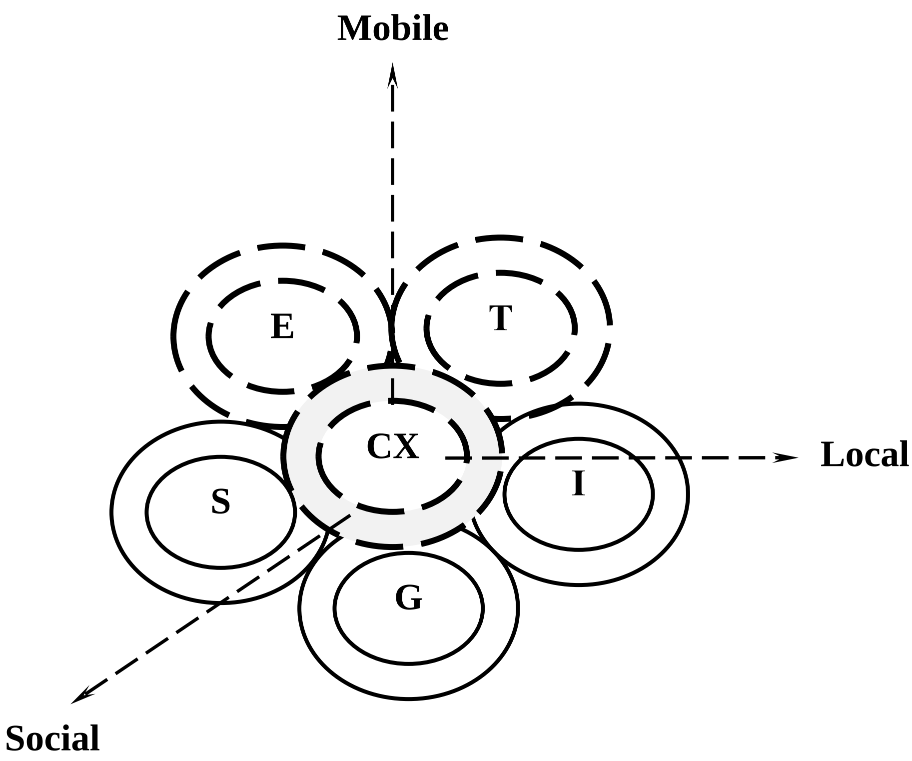

Fig. 1. Model of analysis of factors of changes in consumer

Technological innovations lead to the development of information, logistics, transport and warehousing, financial, institutional infrastructure (I). Virtual 3D stores, technologies for shopping based on radio frequency RFID tags, contactless NFC technologies for payments, cash registers – examples of changes in the infrastructure of modern trade. For online trading, the critical factor is the availability of warehousing infrastructure and reliable methods of remote payment. For countries with emerging markets, the development of trade is constrained by the inherent weakness of infrastructure: poor condition of roads and low level of transport services, lack of extensive warehousing infrastructure, underdeveloped electronic payment system etc.

Armed with digital tools, marketing is becoming a technology for managing human consciousness and philosophy that changes the behavior of all market participants. It is digital technologies that allow for personalization of interaction, customer-centric business. The path of the consumer is significantly reduced, that the attraction to the purchase is in one click. Adaptation of the value proposition to the interests and preferences of a particular customer, taking into account the available information about him is automatic with the help of Lifecycle marketing technologies. Lifecycle marketing focuses on the customer's personality, i.e. behavioral and psychographic motives, examines the client's path in more detail with all the doubts and their causes, interests and customer experience. Under such conditions, the theory and methods of behavioral marketing become of paramount importance as a direction of interdisciplinary research.

Thus, significant changes in consumer behavior are caused by: the diffusion of the scientific and technological revolution 4.0; globalization, which has involved all spheres of human life, and therefore has the form of economic and socio-cultural globalization; digital transformation (ICT, Internet of Things, mobile, etc.); accelerating the pace of life (life time has shrunk, so there may be a minimum pause for eating); increasing life expectancy (population aging); rapid change in the values of generations (the step of generations was reduced to 10 years; misunderstanding and rejection of the values of other generations); increasing the movement of conscious production and consumption, as the principles of sustainable development have become the realities of life; the transition of power in the market from the power of brands to the power of consumers (online community, assessment of consumer experience in real time). They drive change in markets, in corporations and in everyday life.

As of 2019, there were changes in eating habits, which were also affected by the following factors:

– increase in morbidity;

– promoting a healthy lifestyle (HLS) in the media, promoting ideas through opinion leaders among professional athletes, fitness trainers and nutritionists;

– growing popularity of sports;

– increasing the pace of life of consumers in large cities, which requires convenience and speed of consumption with health benefits;

– the impact of global trends (including the spread of veganism) and the active R&D activities of food producers (primarily transnational market players) to create new product categories or niches.

Due to the increase in life expectancy and large-scale diffusion of digital technologies, human age has ceased to influence the formation of the life scenario, so consumer activity on universal foods has directly ceased to depend on age. Analysis of search queries shows that among food products in 2019, Internet users are most often looking for products without GMOs and preservatives, superfoods, healthy products, new snack options, vegetarian and vegan products. Health ethics, fitness and sports, usually the demand for dietary products or health products (the main criteria: benefits, naturalness, ease of consumption and «lightness», which together allow to maintain health and act as disease prevention).

The products with low fat, lactose, salt, sugar are sought 30% more often than usual. Sales of dairy products, chilled meat and poultry are popular, followed by fruits, vegetables and greens, sales of healthy flour have increased: coconut, almond, whole grain, etc., and every third jam bought is low-calorie. Accordingly, the demand for products labeled «eco», «natural product», «organic product» is growing. For the food market a characteristic feature is the asymmetry of information, the presence of the practice of greenwashing. The global problem of greenwashing is related to the prevalence of eco-trends in both consumer and corporate behavior. Greenwashing (greenwashing from English green and whitewash) literally – green camouflage, eco-bleaching reputation – refers to the dissemination of false or misleading information about the environmental strategies, goals, motives and actions of the organization.

For the Ukrainian economy, the problem of greenwashing is very acute. The opacity of the processes of production, transportation, storage and circulation of food, as well as incomplete or misleading display of ingredients on the label creates an asymmetry of information in the market and leads to the oppression of consumer interests. As a result, distrust of brands has become a feature of consumer behavior.

The global trend aimed at implementing the principles of sustainable development and conscious consumption is manifested in the need to expand knowledge about the product consumed, its environmental footprint and so on. Another side of the problem is the inefficiency of the global food system, which is reflected in the significant amount of food waste in industrialized countries. Global economic losses from food waste are $ 750 billion. Food losses per capita and waste in Europe in the household sector are 90 kg per year, and in the retail sector -180 kg per year[1].

As a result, there are trends in white label, transparency of production and clear product composition, environmentally friendly packaging, plastic free and more. The next trend is a transparent label. Consumers study labels in detail to know in which country and how exactly the product was made, how it was transported and stored. A clean (transparent) label is a) a world-wide concept and trend that best meets the wishes of those consumers who want to buy the simplest, cleanest and most natural products; b) consumers' understanding of production technologies, recipes and raw materials used. A product with a clean label is an honest product that meets the following conditions: the product does not contain additives / preservatives; the product contains only those ingredients that you will find in your closet / on the store shelf; the product has the shortest possible list of ingredients; the product is simple, it is processed as little as possible.

The companies are using digitized technology for new labeling or label standardization, giving greater transparency and product tracking. In general, such technologies allow the consumer to make an informed decision to buy food. To form consumer loyalty, brands also use so-called radical transparency, openly demonstrating the conditions of production, their mission and active position of the brand. The social movement «Fair Trade» has become widespread in the world. This model of international market trade is focused on the observance of fair-trade rights; transparency and accountability; ensuring decent working conditions; use of honest methods of marketing and advertising; actual producers of goods and the absence of harm to the environment. Fair Trade labeled products are made from raw materials that come from sustainable sources and have the least impact on the environment (easily biodegradable and recycled packaging materials, sea shipping wherever possible)[2].

[1] Fraunhofer (2019). *Welche Trends prägen die europäische Lebensmittel-Branche bis 2035?* <https://www.isi.fraunhofer.de/de/presse/2019/presseinfo-26-FOX.html > (2019, November, 25).

[2] Fairtrade. FairTrade in Ukraine (2020). *Homepage* <http://www.fairtrade.com.ua/> (2020, April, 21).

The fast pace of life and the availability of multitasking have contributed to the formation of demand for products of the restaurant business formats to go and grab & go. Fast and at the same time natural food, convenient packaging – the main requirements of this format. Since the beginning of 2019, sales of healthy snacks have increased 3 times, and the most popular product in this category – protein bars[1].

First, the pace of digitization. Technologies have played a crucial role for both business and consumers in the context of mass quarantine. First of all, those who are better equipped with IT tools for the company, working smoothly regardless of distances, were ready for the current situation.

Second, the prevalence of FoodTech and digital-marketing. Food Tech (food technology) – processes of integration of digital technologies throughout the food chain: from farms and food production to packaging, storage, preparation and disposal of food. In 2019, Five Season Venture and dealroom.co published a report on the state of the global FoodTech market, which in 2018 was estimated at € 14.3 billion, which compared to 2014 reflected its fivefold growth. The largest share of investment (60%) in the global FoodTech industry is accounted for by online food delivery from shops and restaurants[2]. Among the key trends of the FoodTech market are the following: • new distribution strategy – direct access to the consumer; • increasing use of artificial intelligence in food services. Currently, the market is led by four areas of its integration: a) digital menus (kiosks) for ordering meals; b) chatbots for order processing; c) personalized recommendation services; d) service robotization; • personalization of food (delivery of customized dishes; recommendation services that consider metabolism, allergies and personal preferences; recommend appropriate restaurants, considering their location and personal preferences (low sugar, high protein); • innovations in production, marketing, logistics, consumption (computerized «vertical farms»- growing plants at home; drones that monitor the condition of agricultural land; applications for minimizing food waste (food waste), and» smart systems «for restaurants and families, 3D-restaurants, making meals with 3D printing, potentially in great demand are vending machines that prepare food from ingredients selected by the user, alternative meat, milk, etc)[20]. The Fig. 2 shows the growth potential of Unicorns companies in the field of FoodTech in 2019.

The most popular direction in FoodTech in a pandemic is food delivery, personal diets and healthy eating is in the second place (Fig. 2).

The following fast-growing trends in 2019 are:

– model D2C – direct deliveries to the consumer and

– alternative proteins as a basis for the implementation of the Concept of Sustainable Development and the Millennium Development Goals (Millennium Development Goals)[3]. However, the idea of alternative proteins has not been tested by the challenges of the pandemic. Consumer preferences were given to traditional meat, milk and eggs (Fig. 3)[4].

However, the trend towards disintermediation (exclusion of intermediaries from the value-added chain to create additional value for the consumer) that forms the D2C model is showing sustainability. And another trend that is confirmed by the new challenges is the personalization of the consumer experience. In 2019, brands focused on the B2C market: from pet food to coffee, sought to provide an excellent user experience by building a closer relationship with the end user. This approach has fully justified the significant investment across the chain in creating consumer value.

The abrupt transition to quarantine with the development of a pandemic across all European countries has led to even faster changes in consumer behavior. According to a global Nielsen[5] study conducted, including in the FMCG markets of Europe and Ukraine, the trends in consumer behavior under the influence of a pandemic have been identified.

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[1] Савицька, Н. Л., Жегус, О. В, Афанасьєва, О. П., Морозов, І. (2020). Маркетинг харчових продуктів: тренди та виклики. *Повноцінне харчування: тренди енергоефективного виробництва, зберігання та маркетингу*: Харків. НАНГУ, 486-516.

[2] Dealroom (2019). *The State of European Food Tech 2019* <https://blog.dealroom.co/the-state-of-european-food-tech-2019/> (2020, November, 15).

[3] Unated Nations (2015). *Millennium Development Goals 8. Taking Stock of the Global Partnership for Development* <https://www.un.org/millenniumgoals/pdf/MDG_Gap_2015_Executive_Summary_web.pdf> (2021, March, 15).

[4] Fraunhofer (2019). *Welche Trends prägen die europäische Lebensmittel-Branche bis 2035?* <https://www.isi.fraunhofer.de/de/presse/2019/presseinfo-26-FOX.html > (2019, November, 25).

[5] Будина, Л. (2020). Nielsen: Этапы смены поведения покупателей во время карантина. И ТОП-5 потребительских трендов, которые останутся после. *Retailers* <https://retailers.ua/news/menedjment/10723-issledovanie-nielsen-etapyi-smenyi-povedeniya-pokupateley-vo-vremya-karantina-i-top-5-potrebitelskih-trendov-kotoryie-ostanutsya-posle> (2021, March, 15).

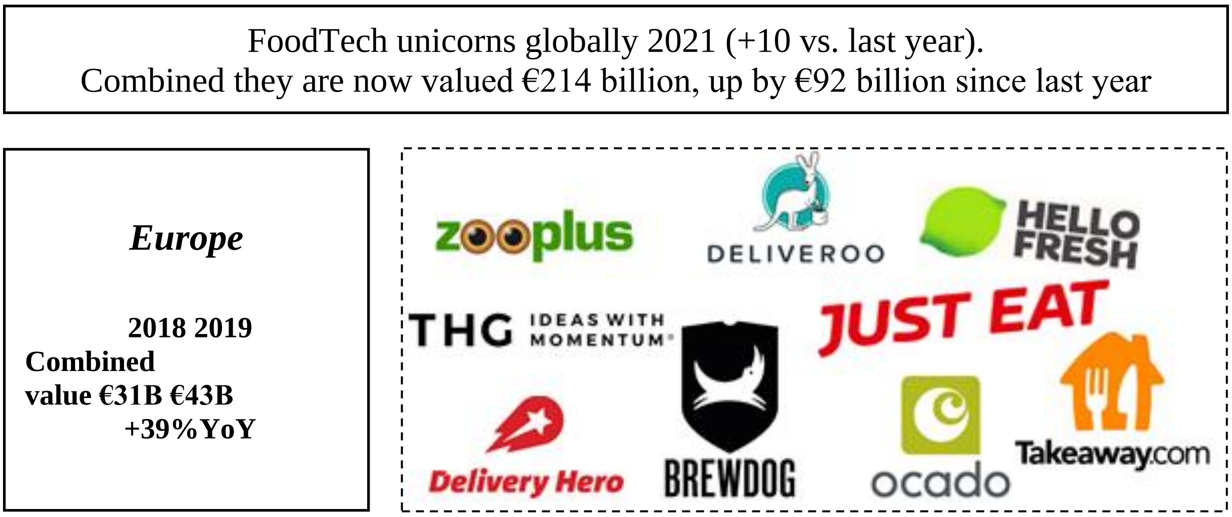

Fig. 2. FoodTech unicorns around the world

Source: Food Tech Trends in Europe[1]

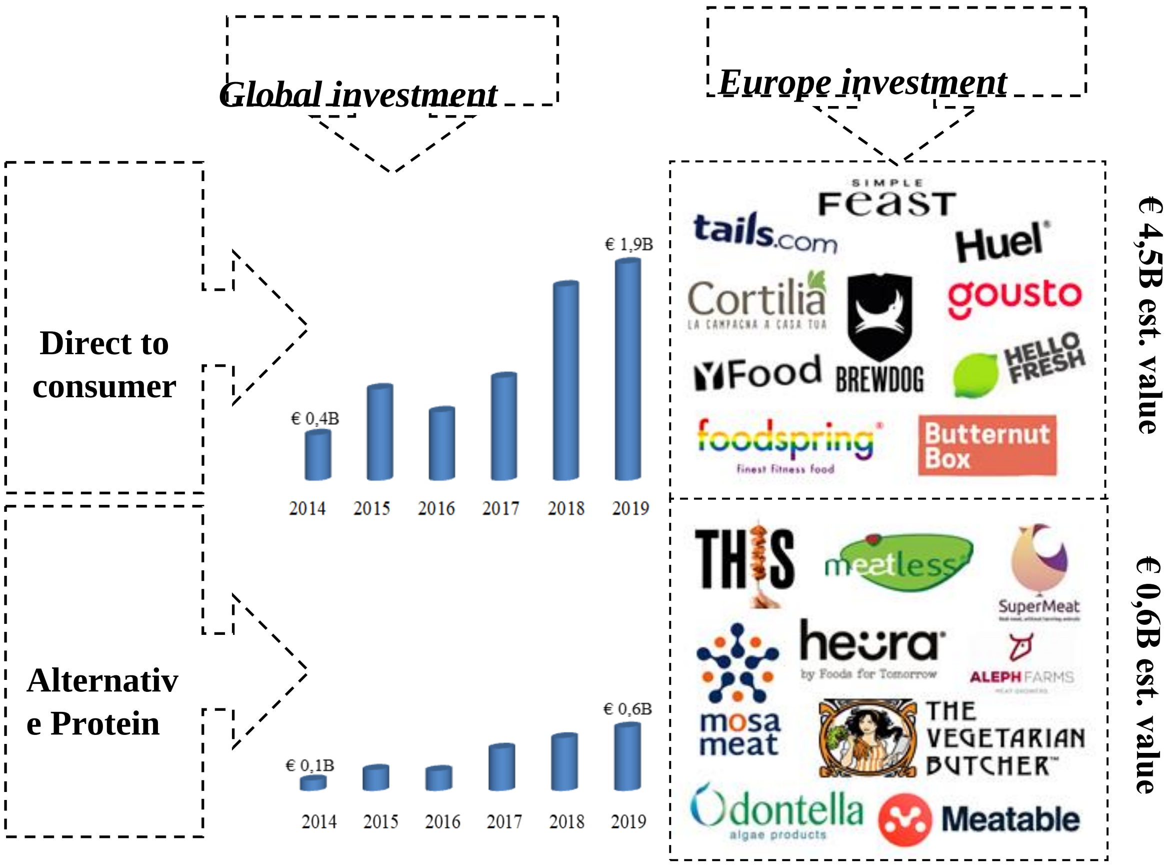

Fig. 3. Fast growing food market trends in Europe

Source: Food Tech Trends in Europe[2]

[1] Forwardfooding (2020). *Food Tech Trends in Europe: What does the future of food look like?* <https://forwardfooding.com/blog/foodtech-trends-and-insights/food-tech-trends-europe-2020/> (2021, March, 15).
[2] Dealroom (2019). *The State of European Food Tech 2019* <https://blog.dealroom.co/the-state-of-european-food-tech-2019/> (2020, November, 15).

Rapid change of retail channels. Before the pandemic, online food purchases were just beginning to become part of the habits of buyers in Europe, and for the people of Ukraine were still in the initial stages of formation of this channel. The transition to the maximum level of online shopping during quarantine took only a few weeks, which would have taken years otherwise. The number of those who bought products online increased by 19%, and 37% began to use online payment more often.

In order to study the trends of changing consumer behavior in the food market, in March 2020, Company Nielsen[1] conducted a survey among consumers in 30 European countries. According to the results of this study, it was found that the frequency of daily purchases in offline stores, including the size and filling of grocery baskets has decreased significantly (Fig. 4).

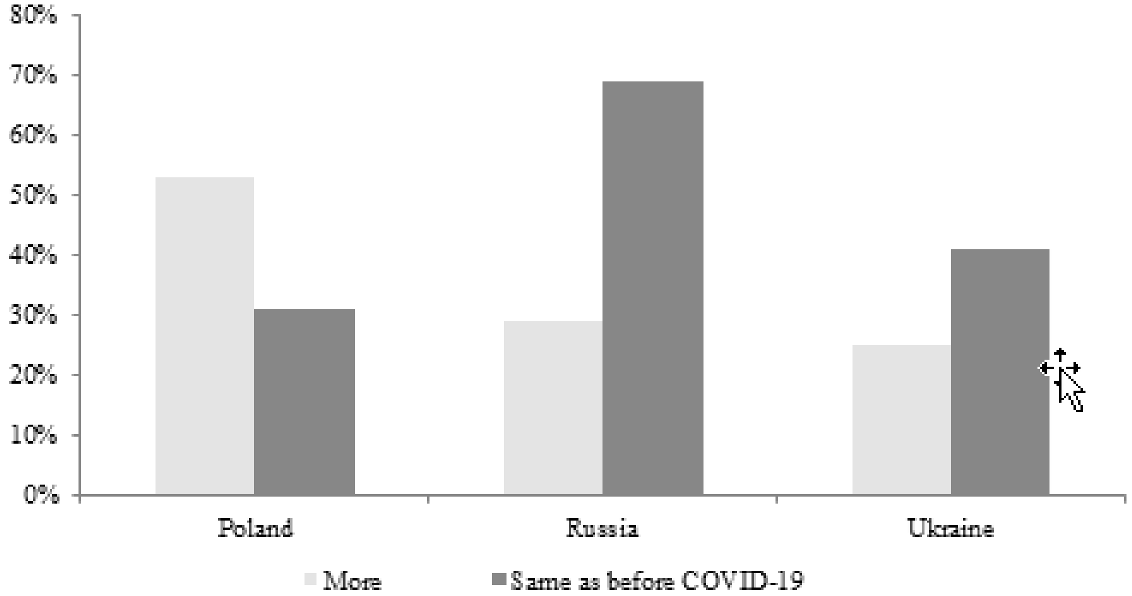

Fig. 4. The volumes of online food purchases during and before the pandemic

Source: Nielsen[2]

In the countries such as Poland, Italy and France, the majority of consumers (80%, 78% and 71% respectively) began to buy less in supermarkets during the pandemic. In Ukraine, on the contrary, the volume of purchases in supermarkets, hypermarkets increased by 6%, because this is where you can come and buy everything at once. The sharpest decline in sales is observed in open markets. Sales in e-commerce channels are growing in both the food and non-food sectors. Traditional FMCG retail is becoming increasingly digital and this attracts buyers (Fig. 5).

The percentage of online sales in Ukraine is low to 3%, but the coronavirus has accelerated the development of this channel, increasing the volume of purchases in it by 92%. In Ukraine, people buy some products not so much out of necessity, but to have fun. That is, online is no longer a forced transition to a new channel, but also a subject and an occasion to somehow pamper and entertain yourself. The share of chocolate bars alone during the strict quarantine in e-commerce has grown by 70%.

Purchases of food through Internet channels before COVID-19 did not grow actively, as at least once less than one in five people in Western Europe and less than one in ten people in Eastern Europe bought online[3].

1) The priority of a clear range.

[1] Будина, Л. (2020). Nielsen: Этапы смены поведения покупателей во время карантина. И ТОП-5 потребительских трендов, которые останутся после. *Retailers* <https://retailers.ua/news/menedjment/10723-issledovanie-nielsen-etapyi-smenyi-povedeniya-pokupateley-vo-vremya-karantina-i-top-5-potrebitelskih-trendov-kotoryie-ostanutsya-posle> (2021, March, 15).

[2] Ibid.

[3] Nielsen (2020). *COVID-19 has flipped the value proposition of omnichannel shopping for constrained consumers* <https://www.nielsen.com/us/en/insights/article/2020/COVID-19-has-flipped-the-value-proposition-of-omnichannel-shopping-for-constrained-consumers/> (2021, April, 15).

2) In the period when the consumer is stressed and needs to spend a minimum amount of time at the shelf, the emphasis is on proven brands. Thus, the focus on a wide range has not withstood the test of new challenges of the pandemic. It should be noted that people began to buy more canned and fresh food. In this regard, both manufacturers and retailers are reviewing and adjusting their range. They are also reconsidering ways to remain relevant to consumers as food selection criteria change rapidly. Before the quarantine, companies had the opportunity to test food to assess their compliance with customer expectations, as there was sufficient time.

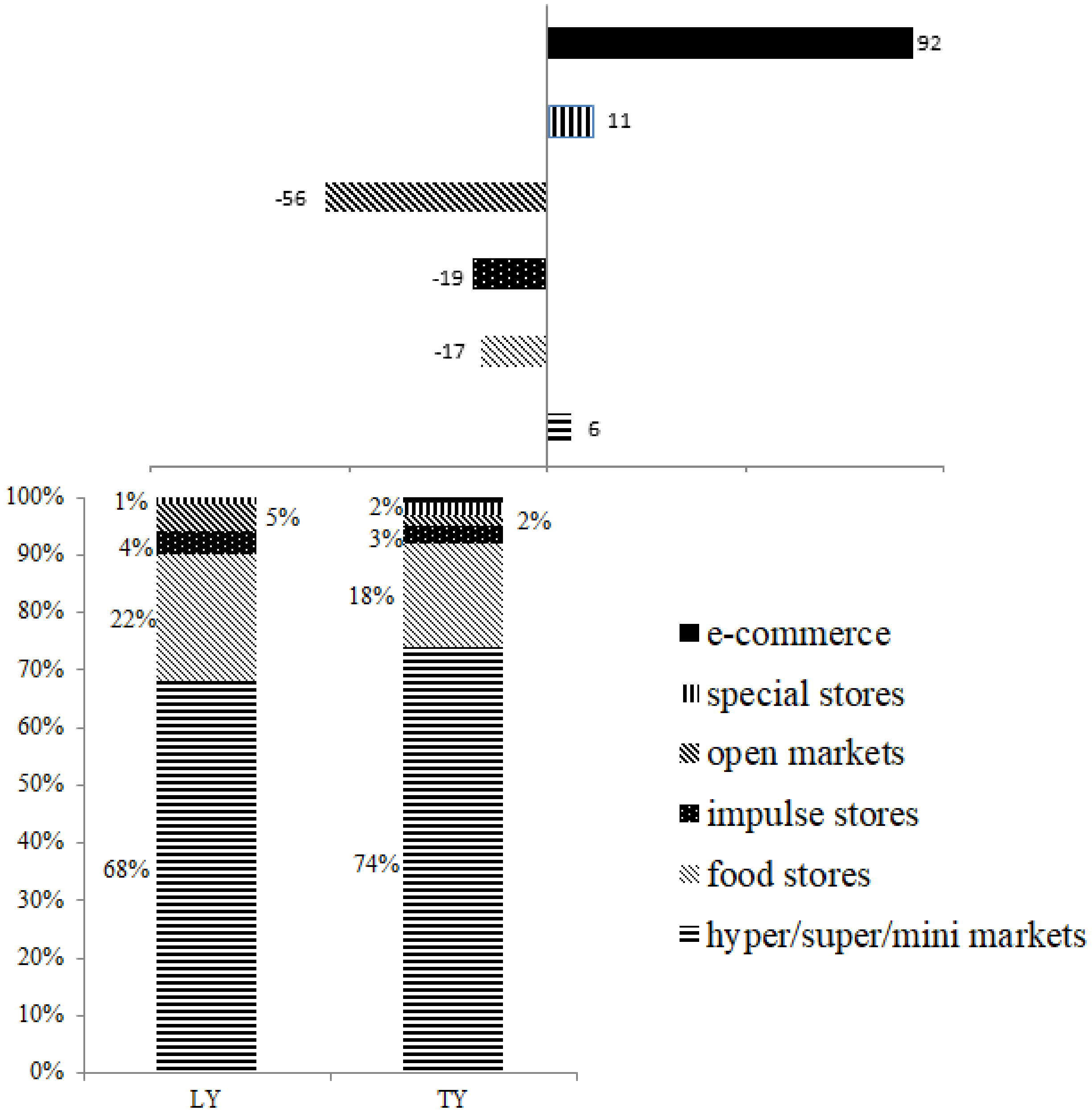

Fig. 5. Dynamics of sales in modern and electronic food trade

Source: Nielsen[1]

[1] Будина, Л. (2020). Nielsen: Этапы смены поведения покупателей во время карантина. И ТОП-5 потребительских трендов, которые останутся после. *Retailers* <https://retailers.ua/news/menedjment/10723-issledovanie-nielsen-etapyi-smenyi-povedeniya-pokupateley-vo-vremya-karantina-i-top-5-potrebitelskih-trendov-kotoryie-ostanutsya-posle> (2021, March, 15).

Total savings are present in the crisis, but seven weeks after the start of quarantine, the consumption of sweets and optional purchases has resumed.

Trends in the choice of trading formats have changed. Hypermarkets and large supermarkets are in great demand, because you can come and buy everything at once. The sharpest decline in sales is observed in open markets. Sales in state-of-the-art, digitalized retail and especially e-commerce are growing in food retail. Online shopping during the quarantine from the new channel has become the norm. In Ukraine, the share of online sales of chocolate bars alone during a strict quarantine increased by 70%. Moreover, most buyers intend to continue shopping online after the quarantine[1].

1) Quarantine digitized the consumer regardless of age.

One in five respondents has not previously bought food online, and one in three older people. And if now 32% of purchases of all goods and services were made online, then in the future this figure is expected to grow to 37%.

The difference between the generations in the choice of channels of purchase and interaction is blurred, and age targeting in the food sector is losing its relevance.

2) People have become more serious about their health and the environmental consequences of shopping. Thus, only during the quarantine period 60% of respondents began to spend more time taking care of themselves and their health, about 57% began to play sports more actively at home; 64% of consumers began to pay serious attention to reducing food waste, and 50% began to make more purchases for health and 45% – more rationally make their purchases.

3) Accelerating the introduction of digital technologies. More than 50% of people have increased the use of digital voice assistants, online applications, self-service services, smart home devices and wearable electronics.

Such trends in shopping, as well as in lifestyle, work, will require significant changes in the formation of the policy of interaction between the buyer and the business. The key accents in communication should be trust, relevance and convenience for the client. The main task of companies in the new environment is to become flexible and bring the portfolio of products and services in line with changing consumption patterns.

Due to the COVID-19 pandemic the world is experiencing a shared experience that shapes consumer attitude as well as their purchasing patterns. The pandemic and quarantine have significantly affected the lifestyle of the European population. Important shifts in consumer thinking and behavior become apparent as the pandemic goes through specific phases.

The main stages that consumers went through during quarantine:

– the threat of survival (the beginning of quarantine, when consumers were worried about their lives and health);
– life with limitations (adaptation to the new reality);
– quarantine fatigue (mood swings);
– adaptation period to new realities;
– formation of new norms of behavior (post-quarantine period).

Due to the social distancing measures taken around the world to combat the pandemic, people's usual way of life has changed radically. Physical and social isolation has become the new norm. These changes have determined how man now perceives such fundamental things as time and space. They also significantly affect our approach to work and leisure, relationships with other people.

The pandemic brought to life a long-forgotten generic concept of economics – «home economy». Lockdown literally closed the families at home. Buyers began to eat more food at home, to spend more time there, and as a consequence, all the goods for the house began to be in great demand – from sanitizers and cleaners to household appliances for cooking, games, home entertainment.

Nielsen[2] also notes significant changes in consumer behavior caused by the COVID-19 pandemic in Ukraine. First, the number of people working from home has increased significantly, and as a result, the proportion of consumers who have cooked more at home than before the pandemic has increased. Due to

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[1] Fooddrinkeurope (2020). *Data & Trends of the European Food and Drink Industry* <https://www.fooddrinkeurope.eu/uploads/publications_documents/FoodDrinkEurope_-_Data__Trends_2020_digital.pdf> (2021, April, 11).

[2] Будина, Л. (2020). Nielsen: Этапы смены поведения покупателей во время карантина. И ТОП-5 потребительских трендов, которые останутся после. *Retailers* <https://retailers.ua/news/menedjment/10723-issledovanie-nielsen-etapyi-smenyi-povedeniya-pokupateley-vo-vremya-karantina-i-top-5-potrebitelskih-trendov-kotoryie-ostanutsya-posle> (2021, March, 15).

restrictions, the audience of cafes / restaurants / bars has significantly decreased. In the post-crisis period, Ukrainians continue to buy food for home cooking, so such categories as butter, vegetable oil, flour, cereals remain relevant. Many Ukrainians have found the «home economy» behavior model convenient for them, so the trend of cooking at home has a long-term effect.

Second, as in other European countries, we are seeing changes in purchasing channels. While Ukrainians have become less likely to visit hypermarkets / supermarkets, while increasing the size of purchases, there is a surge of interest in online shopping, including due to the rapid growth of purchases of food categories.

In post-quarantine, consumers still cook more at home, despite easing restrictions; restaurant sales remain 40% below COVID-19. Such predictions make it clear that consumers will have to recalibrate their shopping habits. In other words, they can continue to eat more at home, but what they eat and how much they can afford will definitely change, and these changes can last for years. But it's not just about food. Consumers will have to carefully review the contents of their shopping cart. As jobs become smaller and young people are forced to stay at home with their parents for longer than planned, the dynamics of home shopping will change.

This point is underscored by the certainty with which consumers in emerging markets view each product category. We believe that some of these new spending models reflect changes in priorities and behavior (Fig. 6).

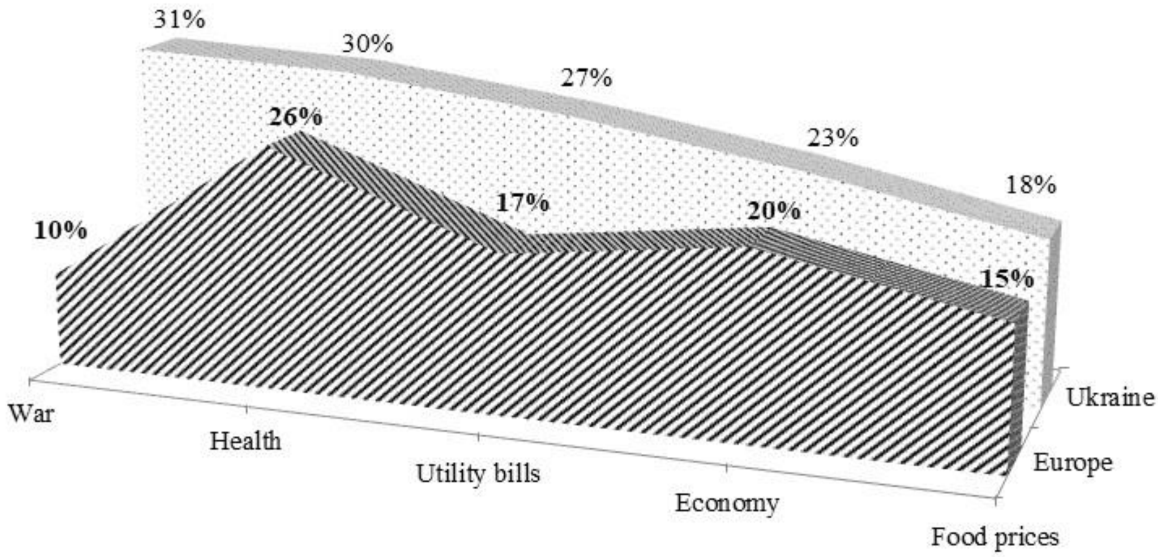

Fig. 6. Top five consumer concerns

Source: Nielsen[1]

The European economy, and consumer behavior within it, is facing major changes. Consumers have serious concerns in both Ukraine and Europe about the economic prospects after the crisis. The COVID-19 pandemic, caused by the SARS-CoV-2 coronavirus, has been a factor that has forced the world to rethink its existence and realize that a new transformational phase is beginning, which may change not only governance patterns but also socio-economic behavior of the people.

In response to the COVID-19 pandemic, there have been significant changes in the lives of many countries around the world:

– imposition of a state of emergency in the country as a whole or in individual regions or areas: in China, the USA, Italy, Spain, Germany, the Czech Republic, Poland, Latvia, Estonia, Hungary, Bulgaria, Japan, South Korea, etc.;

[1] Ibid.

– introduction of sanitary and epidemiological measures in almost all countries (quarantine zones, temperature control, cancellation of mass events, closure of educational and cultural and entertainment facilities);

– setting restrictions on departure / entry to countries and movement within countries;

– strengthening the role of public administration in emergency conditions;

– a sharp decline in economic activity due to quarantine measures and the establishment of restrictions on employment;

– introduction of new distance forms of work and education.

Such unprecedented steps have led to a slowdown in economic development with a projected decline in GDP, reduced consumer activity and reduced production in all countries. Accordingly, it negatively affects the development of both global and regional demand in general.

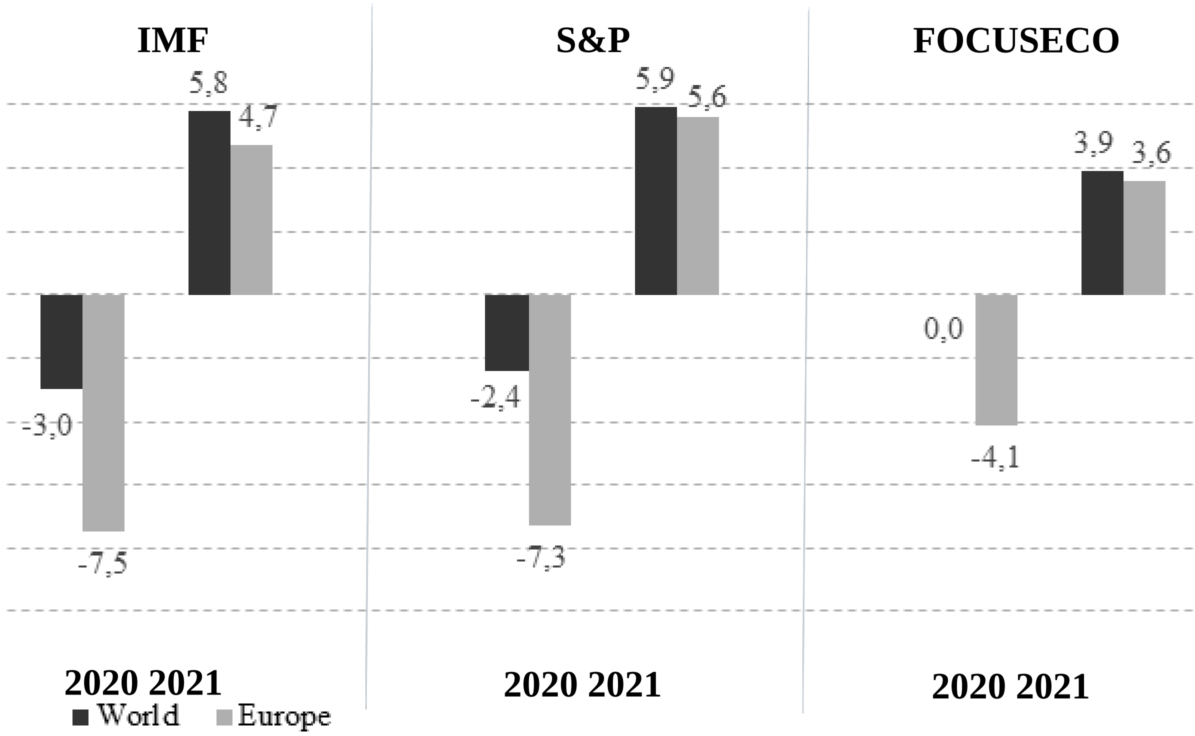

Fig. 7. GDP forecast for 2020-2021

Source: World Economic Outlook[1]

Fig. 7 shows the forecasts of the International Monetary Fund, the international rating agency S&P GLOBAL RATINGS and FOCUSECONOMICS on the development of events due to the pandemic. These data demonstrate expert opinion on the sharp deterioration of the macroeconomic outlook for 2020-2021. GDP dynamics will be accompanied by a decrease in both domestic and external demand.

According to the BCG study, optimism is rapidly and markedly improving in markets that have moved from curbing the spread of the virus to combating a way out of the crisis. In general, consumers in emerging markets remain much more optimistic about their countries' economic prospects for the next 12 months than consumers in developed markets. While other factors may keep emerging market countries from recovering, such as the flight of foreign investment, consumer optimism is a good sign[2]. In terms of generations, Generation Z and people over 40 are the most pessimistic about their spending prospects. This may indicate that the labor market is shrinking and young people do not see employment prospects. Middle-aged consumers experience limitations due to the need to care for their children and aging parents.

[1] Imf (2020). *World Economic Outlook, April 2020: The Great Lockdown* <https://www.imf.org/en/Publications/WEO/Issues/2020/04/14/weo-april> (2021, May, 15).

[2] Bharadwaj, A., Taylor, L., Eppler, B., Barrios, G., Witschi, P. (2020). Demystifying Global Consumer Choice. *Bcg.* <https://www.bcg.com/publications/2020/understanding-global-consumer-choice> (2021, May, 25).

Although for many categories of consumer goods, an increase in value and volume has been inevitable under quarantine, it cannot be called sustainable. Health and well-being have become priorities for many consumers. This is manifested primarily in the demand for nutritious foods, rather than in the commitment to exercise and fitness. Large sets of products may be more affordable, but many people may not have enough money for them. Consumers with a limited budget may be forced to buy smaller packages, and brand loyalty in different categories may weaken. This means that brands and retailers need to be properly guided in the range and prices, form demand for goods with an optimum ratio of the price and quality[1].

For European and Ukrainian countries, there is a significant similarity between the categories in which consumers expect to spend more. These include fresh foods, vitamins and supplements, food delivery and home entertainment.

Under the conditions of quarantine restrictions, Ukrainians most often ordered the following products with home delivery:

– by frequency: the most popular product was bananas, potatoes were in second place, and in third place – beer;

– by volume: vegetables and fruits accounted for more than 20% of the total number of ordered products, dairy products and sweets accounted for 12.6% and 11.5%, respectively. In addition, alcohol was also in high demand, accounting for 11% and non-alcoholic beverages for 8.5%, while meat, fish and sausages accounted for 8% of all products ordered. 4% for bread and pastries, personal care products and household chemicals, as well as snacks. While the demand for tobacco products was only 1.5% (Fig. 8)[2].

As the delivery segment grows, consumers are becoming more aware of the importance of packaging and its impact on the environment. This will force manufacturers and restaurants to choose more environmentally friendly materials. In addition, consumers are trying to reduce food waste, and also need packaging that helps to store food better.

Total savings on everything is present in the conditions of crisis, but this trend cannot be applied to all categories. Products in the lower price category show either a smaller decline or growth, but there are exceptions (for example, premium price segment is important for «coffee» and «animal feed»). The specifics of the category has played its role, where the behavioral routine – coffee consumption for energy and pleasure has been built into the «home economy».

For Ukrainian and Russian consumers, sales of the three fastest growing categories of alcohol – gin, rum and whiskey – in the premium segment outstripped values in the low one. Due to quarantine measures, the shopping experience of Ukrainians has changed significantly and approached the behavior of European buyers in the FMCG segment. If earlier buyers went to an average of two or three points of sale, then with the coronavirus crisis, purchasing behavior has become multichannel. The number of channels has increased significantly due to online, and the economic crisis has pushed to search for the most profitable purchase. Online was not a new channel, but it was usually used to buy appliances, clothing and durable goods. During the quarantine, the demand for fresh food increased. Shoppers are more likely to search for products at low prices or discounts in 98 different categories. Also, users were looking for other ways to save money – for example, they bought large packages so as not to go to the store again.

Ukrainians have abandoned daily shopping (previously this habit was demonstrated by residents of Ukraine and Poland) in favor of large purchases. Some of the buyers have switched to online stores. Also, customers began to visit pharmacies more often.

The «home economy» model attracted nearly 50% of consumers, which was an important change in the consumer pattern. Consumers have switched to self-cooking and DIY activities. Every second buyer began to cook at home and this changed the structure of purchases. The top categories were groceries (buckwheat, various oils) and baked goods, kits for cooking and food delivery. During the period of quarantine fatigue, there was an increase in categories that were not very popular at first. These are alcoholic drinks, sweets, chocolate. Shoppers tried to pay off their depression with food. In general, the safe space of the home contributed to the development of the need for creativity, conscious and safe consumption[3].

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[1] Insights.Gfk (2021). *Know how sustainability concerns impact shopping behavior* <https://insights.gfk.com> (2021, March, 15).

[2] Буряк, В. (2020). У Raketa рассказали, какие продукты чаще всего покупают через курьеров . *Expert* <https://expert.com.ua/132666-u-raketa-rasskazali-kakie-produkty-chashhe-vsego-pokupayut-cherez-kurerov.html> (2021, May, 20).

[3] Pwc (2020). *The consumer transformed. Global Consumer Insights Survey*. <https://www.pwc.com/gx/en/industries/consumer-markets/consumer-insights-survey.html> (2021, March, 15).

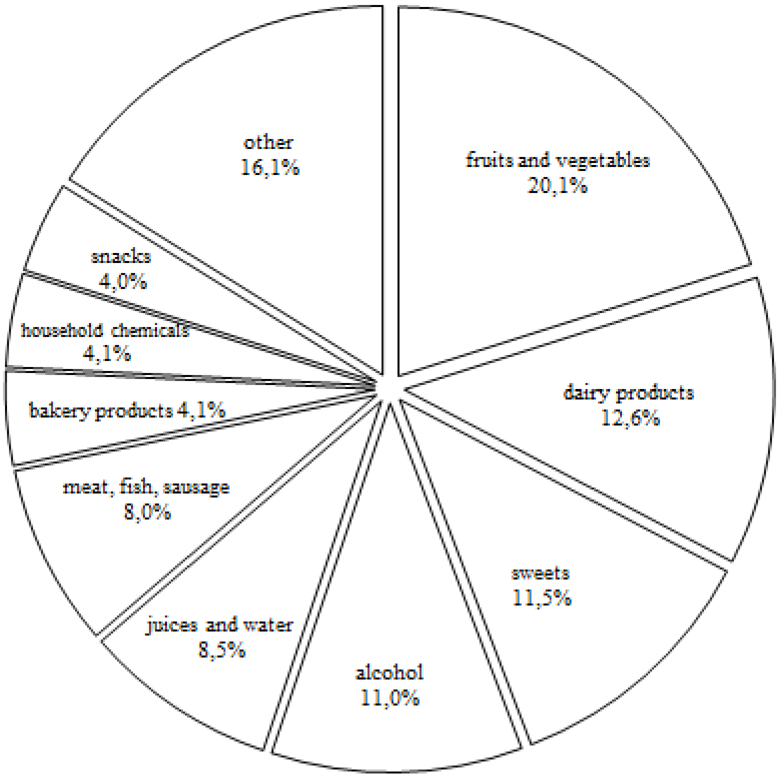

Fig. 8. The most popular Ukrainian goods with home delivery in 2020

Source: Expert[1]

For the first time in three years, the share of those who changed stores in search of a better price increased from 10% to 30%. During the coronavirus crisis, shoppers actively monitored prices: 40% of online shoppers and 60% of traditional store shoppers said prices were rising and they notice it[2].

The usual indicators of the premium quality of goods for buyers – the high quality of ingredients, the quality of service and the high price – remain important not for everyone. Now some of the buyers have free funds, but the priorities are being redistributed. A new norm of consumption at home has formed, even for those whose incomes allow eating in a restaurant. Every one in three of them uses delivery as a substitute for a restaurant and one in two simply because he does not want to cook. Customers will not completely exclude premium products from their shopping cart, but their share will decrease significantly.

A generalization of the presented research materials is shown in Fig. 9, which shows a model of new consumer behavior in the food market. This model (Fig. 9) demonstrates the impact of digitalization and the COVID-19 pandemic on consumer choice. It shows the formation of a new awareness of the value of life, the needs of food safety and shopping, convenience and availability of goods. A new lifestyle of consumption has emerged – the «home economy», which is based on food security, comfort, self-care and well-being. During the pandemic, the focus of eating behavior shifted from dieting and healthy eating to a holistic concept of healthy living. A decrease in income due to a lockdown will reorient consumer demand to functional.

The frequency of purchasing goods, including food, has decreased. The main factors of consumer choice were: price, ease of purchase (ease of ordering, co tactlessness, speed of delivery, reliability of a retailer), assortment, brand transparency. There have been significant changes in the communication and sales channels. Digital innovation and technology have proven their value in maintaining a positive customer experience and have expanded the reach of communications. Social networks, mobile sales, direct selling platforms (D2C channel) are increasingly used as a tool for interacting with consumers, becoming one

[1] Ibid.
[2] Euromonitor (2021). *Top 10 Global Consumer Trends 2021* <https://go.euromonitor.com/white-paper-EC-2021-Top-10-Global-Consumer-Trends.html> (2021, March, 15).

of the main channels for the personalized offer of goods and services. The consumer's perception of prices and the value of products have become the primary determinants of their choice. The digitalization of the consumer experience and the challenges of the COVID-19 pandemic has accelerated the pace of change, affecting the way people live, work and eat, radically changing consumer behavior and the customer experience.

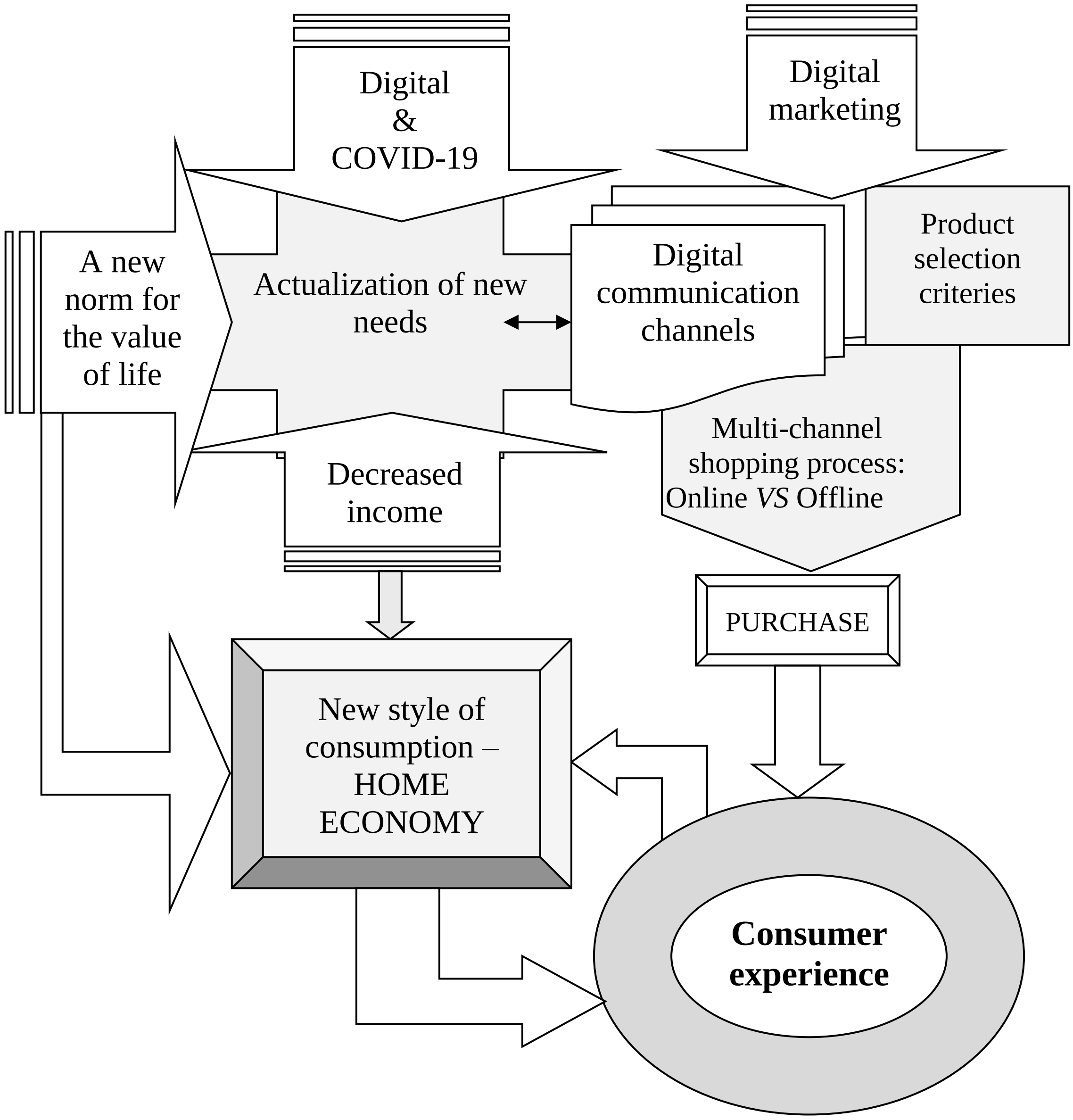

Fig. 9. Model for the formation of a new consumer experience

Conclusions and prospects for further research. The formation of consumer experience in the food market is influenced by megatrends that determine technological and socio-economic changes in consumer behavior, shopping processes and perceptions of the consumer value of the product. The key challenges for the development of the food market were the digital transformation, the availability of greenwashing, the strengthening of the value of conscious consumption and the COVID-19 pandemic. Consumer experience covers all aspects of the company's offer – price, quality customer service, safeness, communications, packaging, product and service features, ease of use and reliability.

The cascade of transformations has led to the emergence of new values of life, consumer demands on the product, brand transparency and the model of «home economy». Comfort, naturalness, well-being and satisfaction as a way of life with a predominance of physical and mental health have determined the directions of consumer patterns focused on functional demand, convenience and time savings. The Corona Crisis has accelerated digital behavior in emerging markets, with new users gaining digital experience and overcoming obstacles by trying digital transactions and forming new habits. There is a new norm, when consumers switch their attention to functional demand in all categories of goods, paying special attention to the purchase of fresh products. In the new post-quarantine world, there are significant similarities between Eastern European countries in consumer behavior patterns.

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