New shopping behaviour in a changing environment [1]

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Abstract

Frame of the research: *The research investigates shopping behaviour changes after the health emergency due to the COVID-19.*

Purpose of the paper: *This work aims to explore the determinants of multichannel behavior in the grocery sector, the nature of choice and the benefits sought in the evolving market context, which has been changed by the recent health emergency in the ongoing digital landscape.*

Methodology: *Four focus groups with family purchasing managers, divided into two age segments (young people and adults) were conducted. The T-Lab software was used to analyse the content.*

Findings: *Multichannel shopping is a feature common to the two sample groups. What has changed is the nature of its determinants: mainly utilitarian for young people, mainly hedonistic for adults. The rediscovery of the value of human relationships emerged during the pandemic and this seems to be a new choice driver, together with the demand for commercial services, aimed at satisfying the time-saving and convenience dimensions of shopping.*

Research limits: *Purchasing behaviour for other product categories should be investigated in order to understand any sectoral differences. Moreover, a quantitative analysis should be carried out to understand the extent and nature of the phenomena that emerged.*

Practical implications: *The results must be seen as an opportunity to identify what the future direction of sales innovation should be. Human capital and technology represent the main assets to be considered as drivers in the development of innovative sales approaches.*

Originality of the paper: *The analysis will make it possible to identify the sales services considered a priority by consumers in order to understand which changes retail companies need to adopt to remain competitive in the evolving market context.*

Key words: shopping behaviour; sales services; channel choice determinants; COVID-19; focus group; content analysis

1. Introduction

The year 2002 has been defined as the age of the digital revolution since most of the information stored technologically was in digital, rather than

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analogue, form (Hilbert, 2011). It is not perfectly clear, however, what this means or how this was verified but, evidently, at that moment, the world felt the need to recognise that "the digital revolution had come to power" (Baricco, 2019).

Eighteen years later, in 2020, the world was hit by a terrible pandemic. In a few months, the health emergency in China linked to the spread of COVID-19 (the disease caused by the Severe Acute Respiratory Syndrome Coronavirus 2) evolved into a worldwide pandemic that led to a global humanitarian, social and economic crisis (e.g., Laborde *et al.*, 2020; Martin *et al.*, 2020; McKibbin and Fernando, 2020; Lucchese and Pianta, 2020). Lockdown and social distancing measures to prevent the spread of COVID-19 in the affected countries suddenly changed how individuals lived and worked and stopped many manufacturing activities. Whole sectors, such as air travel, transportation, tourism and restaurants, stopped completely (Lucchese and Pianta, 2020).

What do the digital revolution and the pandemic have in common? These factors have given a huge boost to the spread of electronic commerce and digital services. During lockdowns, consumer use of the electronic channel became an absolute need. Consequently, many companies had to quickly rethink their distribution practices and, generally, digitise their business processes. The spread of e-commerce also affected the grocery sector, where online sales were developing more slowly in many countries until that moment (e.g., Pantano *et al.*, 2020; Vergura *et al.*, 2021). This also happened in Italy. Starting from the end of February 2020, consumer goods companies were subjected to an impressive "stress test": on the one hand, they had to cope with massive waves of physical store purchases; on the other hand, they experienced very rapid acceleration of sales through the online channel (IRI, 2020).

More generally, and regardless of the pandemic, in the last decade the development of digital technologies has not only led to the spread of the online sales channel, but has also changed the ways companies and consumers interact. New services and new methods of collecting information (e.g., mobile apps, mobile payments, click and collect, home deliveries, assortment customisation, social commerce) have blossomed, influencing the individual decision-making process (e.g., Aiolfi and Bellini, 2019; Jara *et al.*, 2018; Jih, 2007; Thirumalai and Sinha, 2011).

Another interesting phenomenon that affected the Italian grocery market in 2020 was the strengthening of local and neighbourhood retail. Forced to go grocery shopping close to home, many consumers rediscovered neighbourhood retail during lockdown and increased their attention on the short supply chain, the quality of raw materials and the environment (Hobbs, 2021). This attitude can have important repercussions on the market scenario in terms of increasing market share for some physical retail formats and local companies and, contextually, for new digital intermediaries that market products from local farmers and producers.

The social and economic changes seen so far are raising important questions on current and future market scenarios. Many scholars, research institutes and national governments are focused on the quantitative changes in the grocery sector due to changes in channel dynamics (online vs offline), to the emergence of new market players and, ultimately, to the global crisis due to the pandemic. This work intends to enrich this knowledge from a qualitative perspective by exploring consumer purchasing habits and drivers in the new environment which has been shaped by the evolution of digital technologies as well as by the health emergency due to the COVID-19 pandemic.

Specifically, this research intends to investigate the determinants of multichannel behaviour in the grocery sector in order to understand the nature of purchasing drivers (utilitarian vs hedonic; permanent vs transitory) and the benefits found in the evolving market context which has been changed by the health emergency in the ongoing digital landscape.

The analysis will consider two segments - adults vs young people - based on the assumption that purchasing behaviour is influenced by age (e.g., Drichoutis *et al.*, 2007; Singh and Verma, 2017). This behavioural difference between young people and adults was also confirmed during the COVID-19 and post COVID-19 period (Di Crosta *et al.*, 2021; Valaskova *et al.*, 2021; Pirc Barčić *et al.*, 2021).

Overall, the paper, through explorative research, aims to better understand the nature of the behaviour changes (permanent or transitory) in order to provide useful suggestions to companies on which future strategic direction to take. Specifically, the methodology used for the focus group will make it possible to bring out insights useful for achieving the set objective. In fact, the group dynamic, on which the focus group is based, appears particularly useful for understanding phenomena that have not yet been explored, since it favours the expression of opinions and beliefs that are not easily identifiable in an individual comparison. COVID-19 and the consequent lockdowns have generated a completely new situation that scientific literature, and not only that, have never faced and for which there was not much information.

The remainder of this work is organised as follows: the next section reviews the relevant literature and highlights the research objectives; the 'Methodology' section presents the research design, the data collection procedure and the methodology used for data analysis; subsequent sections present the qualitative results with a discussion, highlighting theoretical and managerial implications.

2. Conceptual framework and research objectives

The lockdown and social distancing measures employed to limit the spread of the COVID-19 virus have generated significant disruptions in consumer behaviour (e.g., Donthu and Gustafsson, 2020; Sheth, 2020). Changes in purchasing and consumption emerged, especially regarding the grocery sector. For instance, at the beginning of the outbreak, consumers displayed stockpiling behaviour that significantly deviated from their usual shopping habits (Eger *et al.*, 2021). Other consumers had to move to purchase and payment methods never experienced before, such as online shopping, store pick-up, and cashless payment (Pantano *et al.*, 2020). Moreover, consumers might have switched from the retailers they usually patronise to their competitors because of experimenting with new purchasing practices and needs. For example, during the lockdown periods, proximity became paramount (since long(er) trips were impossible) as did the purchase of local products at farms or traditional shops. The experimentation of different levels of new service efficiency, such as home delivery and click and collect, might also prompt consumers to reconsider their established habits and preferred retailers.

Regardless of the role that COVID-19 has played, and still plays today, in the social and health context, from an economic perspective the pandemic simply acted like a "black swan" (Taleb, 2015) (e.g., the introduction of new technology, the development of new sectors or new distribution channels), a disruptive event which led to strong changes in market scenarios and consumer decision-making. Above all, there has been a strong push to spread online technologies and, more generally, digital technologies (e.g., mobile apps, mobile payments, click and collect, home delivery, social commerce) which has found fertile ground in the current economic and social context. This diffusion process would probably have taken a few more years; yet, it took place in just a few months. Just think of the diffusion rate of the e-commerce channel in the grocery sector, which was still low until 2019 when compared with other sectors. This may have pushed consumers towards consolidating multi-channel behaviour with reference to food shopping and changing the main factors driving the use of the online grocery channel. On the other hand, this could also be considered a temporary solution to reduce the risk still associated with social interaction. At the same time, the drive to develop such technologies as near field communication, quick response codes and mobile wallets has modified the way consumers can pay for their purchases (De Kerviler *et al.*, 2016). Mobile payments have been considered a key driver of consumer perception of a store's overall image, capable of influencing the store preference (e.g., Soman, 2001; 2003; Falk *et al.*, 2016; Vergura *et al.*, 2021). Nowadays, retailers are devoting more and more resources to these time-saving services by leveraging not only the advantage of fast checkout, but also the security aspect when compared to cash, which can be a viral vector (Ren and Tang, 2020). Consequently, these services may be increasingly able to influence the consumer retail choices.

These various changes may have also challenged traditional store choice drivers and purchasing behaviour. Taking the assortment as an example, one of the most important drivers of store choice, recent literature has shown that the perceived scarcity of products can significantly affect consumer choices (Hamilton *et al.*, 2019). The repeated out-of-stock events (due to lockdown) could have altered consumer preferences, ultimately affecting the store choice in the long term, even after the store's assortment returns to normality (Pantano *et al.*, 2020).

Motivation for shopping may also change over time, especially in a context of social and spatial constraints. Purchase drivers are divided into utilitarian, which includes factors such as efficiency and cost (Babin *et al.*, 1994; Kim, 2006), and hedonic, which includes factors such as effect, social interaction and entertainment (Arnold and Reynolds, 2003). The utilitarian consumer has a rational approach (Babin *et al.*, 1994), while the hedonic consumer has an emotive approach (Hirshman and Holbrook, 1982). A shopping experience can, at the same time, provide both hedonic and utilitarian value (e.g., Babin *et al.*, 1994; Babin and Darden, 1995) and this can happen in both the physical and virtual contexts (e.g., Kourouthanassis *et al.*, 2007; Hill and Lee, 2012). Koch *et al.* (2020) demonstrated that, during COVID-19 lockdowns, the hedonic shopping motivation was more relevant than the utilitarian one in online clothing purchase behaviour, given the limited opportunities for recreational activities.

This work aims to answer the literature call for more research on the way consumers have changed their purchasing and consumption habits (e.g., Sheth, 2020; Verma and Gustafsson, 2020). Several authors have explored changes in physical and online shopping habits during the pandemic emergency (e.g., Alaimo *et al.*, 2020; Grashuis *et al.*, 2020; Marinković and Lazarević, 2021). Will these habits be permanent or will consumers return to their old habits in the mid to long term? As Sheth (2020) highlighted, on the one hand, the expectation is that most habits will return to normal but, on the other hand, "it is inevitable that some habits will die because the consumer under lockdown conditions has discovered alternatives that are more convenient, affordable and accessible". In light of the above, there is a need to grasp the changes in consumer shopping behaviour and, specifically, there is a need to understand whether they are only short term or whether the effects will be long-lasting, triggering definitive changes in purchasing dynamics. On one side, once social constraints are removed, consumers can appreciate going back to old habits. On the other side, as consumers have learnt to base their purchasing choices on new drivers or to weigh the classic drivers differently due to recent (working, leisure and purchasing) constraints and advancements in technology, new and persistent habits may also emerge.

In particular, the main objective of this work is to understand the nature (permanent or temporary) of the changes generated by the COVID-19 health emergency in terms of channel/format choice and the sales services required. To pursue this objective, explorative research investigated the main drivers of grocery store choice in both physical and digital channels and for different consumer segments (young people and adults), the nature of purchasing behaviour (single channel vs multi-channel) and the type of integration of the different sales channels and formats (modern and traditional, physical and digital, specialist and non-specialist). The analysis will make it possible to identify the sales services, which also emerged as a result of the COVID-19 pandemic, considered a priority by the consumer in order to understand which changes to strategies retail companies need to adopt in order to remain competitive in the evolving market context.

3. Methodology

3.1 Sample

The research was conducted with a sample of 28 consumers, well distributed between men and women, coming from different cities in an Italian region. This made it possible to ensure that the distribution structure reference of the participants was homogeneous. Given the research objectives, family purchasing managers were involved and they were divided into two age segments - young people (18-34 years) and adults (35-65 years) - in order to bring out any differences in behaviour patterns due to different purchasing needs and generational differences. Participants took part in four online focus groups of six to nine people. Two focus groups involved young people and two groups involved adults. The separate discussion with the two age segments minimised the risk of detecting partial dynamics of the phenomenon under study and provides a 360-degree and comparable representation between the two age groups, while providing sufficiently rich material for an effective analysis.

Focus groups were conducted until data saturation was reached: using multiple focus groups allows the extent to which saturation (Flick, 1998; Lincoln and Guba, 1985; Morse, 1995) has been reached to be assessed. Specifically, data saturation is reached when information occurs so repeatedly that the researcher is able to anticipate it; the collection of new data seems to no longer have any additional interpretative value (Sandelowski, 2008; Saumure and Given, 2008). If Krueger (1994) and Morgan (1997) suggested that three to six different focus groups are adequate to reach data saturation, Hennink *et al.* (2019) proved that four focus groups were sufficient.

3.2 Materials and procedure

Focus group sessions lasted about ninety minutes were conducted online in January 2022 using the Microsoft Teams platform, over four separate afternoons. The focus group technique was chosen since it is particularly suitable to achieve the objectives of this work since social interrelationships artificially created on a small scale help individuals clarify their opinions simply and creatively, activating a process of co-constructing meanings attributed to the objects under investigation.

The focus groups were conducted in person by the two authors of this work, acting as moderator and co-moderator respectively. Before participating in the session, participants read the privacy policy and signed an informed consent form covering their participation and the processing of their data. The discussion was based on an interview format, consistent across all focus groups and defined on the basis of the topics relevant to the cognitive objectives of the research. The themes discussed were:

- the usual purchasing channels for the different types of food shopping (e.g., fruit and vegetables, meat, packaged food, etc.);
- the drivers of the choice of purchasing channel;
- the need for sales services, which emerged in the context of the COVID-19 pandemic;
- future expectations regarding the services offered by retailers.

Sessions were recorded and later transcribed verbatim for the purposes of thematic analysis.

3.3 Data analysis

The analysis was divided into two stages. In the first stage, the researchers, separately, read the transcripts twice to become familiar with the data and defined the codes using the template method (King, 1998) which combines the theory-driven approach (themes identified *a priori*) with the data-driven one (themes emerging from the discussion). Then, the researchers proofread the transcripts together, discussed any differences in the codes and reached an appropriate interpretive agreement. In a second step, the codes were aggregated into categories, according to the similarities found between them. This activity led to the identification of the categories and codes listed in Table 1. Only words that appeared at least four times in the text were considered in the analysis and the frequency of appearance determined how representative they were of the content: relevance increases with increasing frequency. Some lexical forms (those referring to the same object) have been grouped into a single lemma.

The T-Lab software was used to facilitate content analysis by employing data categorisation. This software is most suitable when the topics of discussion are defined *a priori*, as in this work, and it also supports the reliability of the qualitative results through appropriate statistical and lexical analyses.

Quoted comments from participants have been selected to represent the themes which emerged and are reported verbatim in the results section.

Tab. 1: Categories and codes of thematic analysis

Categories	Codes
Modern grocery physical sales channels	Hyper-Super, Discount
Modern specialist physical sales channels	Large area specialist, Drugstore
Traditional physical sales channels	Butcher, Greengrocer, Wine shop, Market
Digital sales channels	E-commerce, Marketplace
Benefits sought/Drivers of choice	Price, pleasure, convenient, quality, small, service, time, people, trust, near/home, offer, search
Product types	Clothing, meat, cosmetics, electronics, brands, fruit and vegetable, fresh, bottle, bread, organic, brands
Type of expenditure/shopping mission	Big shopping, weekly shopping, habit
Commercial services	Home delivery, technology, takeaway, need, order

Source: the authors' analysis

4. Results and Discussion

In order to have a general view of the purchasing behaviour in the two consumer segments, it is useful to observe an analysis of the word occurrences (Table 2) and the related graphical representations through a multidimensional scaling map (MDS). Figures 1 and 2 provide an overview of the relationship between lemmas (headwords): the size of lemmas is a proxy for their importance and their closeness is a proxy for the intensity of the relationship between them.

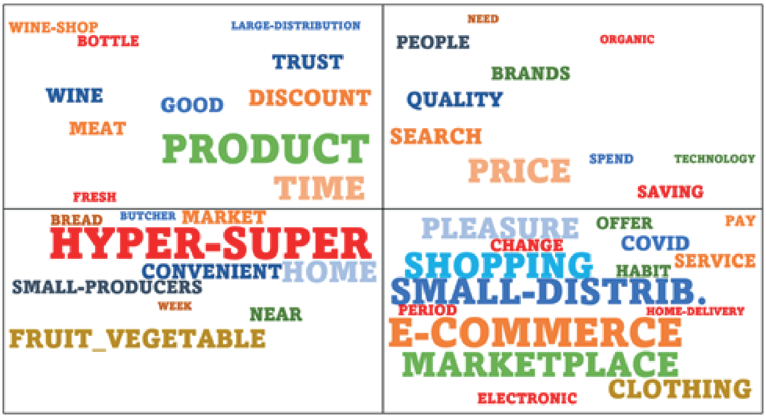
Tab. 2: Occurrences of first headwords by importance (frequency greater than/equal to 15)

Adults Group (over 35)		Young People Group (under 35	
Item	Occurrences	Item	Occurrences
Hyper_super	130	Hyper_super	115
Product	68	E-commerce	86
E-commerce	67	Small_Distributors	38
Small_Distributors	63	Product	63
Shop	50	Shop	60
Marketplace	48	Home	53
Time	43	Week	39
Price	42	Clothing	36
Pleasure	34	People	30
Home	33	Search	26
Clothing	27	Covid	26
Fruit_and_vegetables	27	Habit	24
Discount	26	Pleasure	23
Search	24	Service	23
Trust	23	Near	21
Convenient	22	Time	20
Quality	22	Meat	20
Wine	22	Convenient	20
Small	21	Quality	19
Covid	20	Small	19
Good	20	Offer	18
Return	18	Trust	17
Service	18	Electronic	16
Meat	15	Brands	16
Market	15	Cosmetics	16
		Discount	15
		Marketplace	15
		Big_shopping	15

Source: the authors' analysis

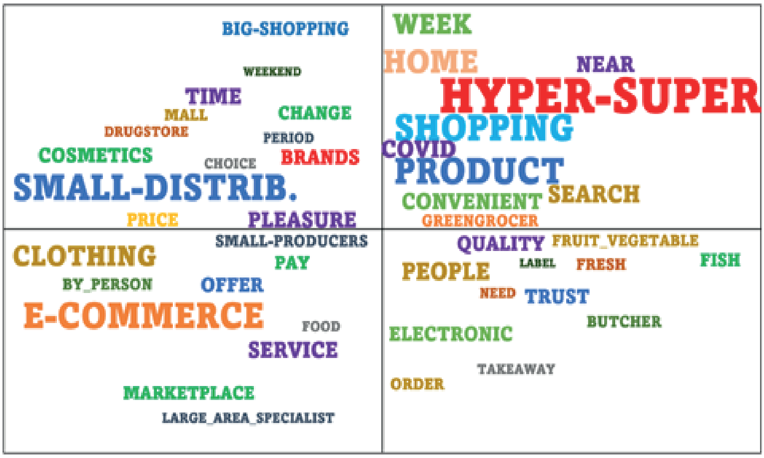
The importance of the headwords, expressed by the frequency they are mentioned and graphically represented by their size, appears rather similar between the two groups: in both maps, the headwords related to the types of purchase channel (Hyper-Super), neighbourhood retail, e-commerce) emerge clearly, followed by those related to the product (product, meat, wine, fruit and vegetables, etc.).

Fig. 1: MDS of adults



Source: the authors' analysis

Fig. 2: MDS of young people



Source: the authors' analysis

From a first aggregate and transversal reading of the two conceptual maps, it is possible to identify the presence of a multichannel consumer, who integrates different purchase channels according to the types of product and benefits sought.

Although multichannel behaviour is a distinctive trait in both groups, a deeper analysis of the occurrences and the single MDS reveals some differences in the level of importance of the headwords, as well as in the relationships between them, outlining some behaviour that seems to be moderated by the generational factor. In particular, some specificities emerge concerning the degree of integration between sales channels and the underlying determinants, which denote the different involvement in the purchasing decision-making process. Adults are more engaged in shopping than young people: they are willing to devote time and attention to the planning of shopping and to the search for information through different media, and they tend to integrate several purchasing channels depending on the benefits sought. Within the hedonistic component, this assumes considerable importance. In contrast, young people tend to take a more rational approach to shopping: they are less willing to invest their energies in planning their purchases and in the actual shopping process. For these reasons, the convenience dimension mainly drives the integration between channels: young people tend to concentrate their purchases in the same shop and they choose the store and the channel to optimise costs and benefits.

Starting from this general perspective, the distinguishing features of the purchasing behaviour in the two sample groups are discussed below. By analysing the drivers of choice of different channels, changes in purchasing behaviour due to the COVID-19 pandemic will also be highlighted.

4.1 Multichannel determinants

Multichannel behaviour appears more intense in adults: the quadrants in the lower part of the MDS (Figure 1) reveal a crowding of headwords related to the different types of distribution channel. The difficulty in drawing a clear demarcation line confirms the complexity of this phenomenon: adults seem to constantly alternate channels according to the products, needs and benefits sought.

I do my shopping at the supermarket. But as far as fruit and vegetables are concerned, I usually go to a farmer's market […] As for drinks, we also go to a wine shop.

This trend is favoured by the greater amount of time available to adults and, mainly, by the positive attitude they have towards the shopping activity: something enjoyable to which adults devote time and attention for its impact on health, the environment and society. This consideration is confirmed by the frequency of the lemmas, "product", "time", "pleasure" and "search", as illustrated by the table of occurrences (Table 2). Grocery shopping is considered by adults to be a demanding process, requiring a good deal of preparation and planning. Moreover, the time spent on searching for information and evaluating purchasing alternatives is not a sacrifice, but a moment for pleasure and a useful investment in order to obtain the best benefits from the shopping activity and to limit the sense of regret that may arise from a wrong choice.

Shopping is a job, so I choose convenience: I go to the shops close to home, which is convenient to me, or I go to the shops where the bread is good ... so shopping is a job if you want to do it in an organised and planned way. It takes time and research.

I have to say that it's very nice to have time so I go shopping, I get bread, then I go to the butcher and then I go to the supermarket …

In the group of young people, multichannel shopping emerges as a mode of purchase, but appears less intense: in the MDS (Figure 2) the headwords related to the distribution channels are more distant and less interrelated, highlighting that each channel has a more defined vocation. Compared to adults, "product" is relatively less important (it is fourth in terms of frequency), while the lemmas, "habit" and "big shopping", appear for the first time in the list of headwords in terms of frequency.

In contrast to adults, young people are less willing to invest time in the search for particular products and, consequently, to shop in more than one store: they prefer to concentrate their shopping to a single location to limit their efforts. The frequency of the keyword, "habit", preceding "pleasure", together with the keywords, "big shopping", denotes that the convenience dimension prevails over the experiential one for young people, resulting in less store format mobility.

If I go to a specific store, it's because I know I can find everything I need without having to go to several places.

The purchasing decision-making process of young people is more rational and utilitarian: it is a laborious activity that requires time and energy. While, for adults, the time invested in shopping is a source of pleasure and gratification, for young people it is mainly a chore to be contained by reducing the frequency of purchases and the number of channels visited. The decision to alternate shopping channels does not originate from the search for a particular product, as for adults, but rather from the need to optimise the time and effort required. The use of supplementary channels, in addition to the primary channel used for "big shopping" (typically the modern specialist channel), occurs occasionally and for contingent reasons. Young people, with little time available, a busy life and the limited importance they give to shopping compared to other daily commitments, are less willing to devote energy to planning purchases and choosing sales channels.

To conclude, multichannel shopping is a characteristic common to the two sample groups. What changes is the nature of its determinants: utilitarian for young people, hedonistic for adults. However, the balance between convenience and experiential dimensions may change according to lifestyle and time factors.

4.2 The modern channel choice determinants

The modern channel, identified with the headword, "hyper-super", dominates the conceptual map of both the analysed age segments and is at the top of the occurrences list (Table 2). However, a more detailed analysis of the associations between the keywords reveals some distinctions that confirm the different orientations of the two groups and are discussed above.

Adults choose the modern channel when purchasing categories requiring low psychological involvement, such as packaged food products, the quality of which is standardised and guaranteed by the brand. For fresh products, the traditional channel is preferred since it is considered more reassuring; however, the modern channel is not a priori excluded if the consumer has adequate information deriving from a previous purchasing experience. Said differently, information guides the choices made by adults: their assessment of large retailers is not the result of prejudice, but of a careful evaluation process that relies on experience.

We only go to the supermarket for canned goods or pasta, otherwise, we like to go to the baker for bread and to the farmer for fruit.

Some supermarkets have fresh fish and a butcher who processes the meat on the spot, so I take advantage of this.

When it comes to modern channels, adults prefer small/medium-sized formats because they are able to satisfy their shopping needs in several stores; therefore, they have no need for the so-called, "big shopping expedition". The supermarket is the preferred format as it satisfies both the need for variety and the search for speed.

The preference expressed by adults for small formats can also be explained by the importance they attribute to the relationship with the sales staff. Also in the modern channel, adults seek a direct relationship with the retailer and appreciate the assisted sales departments where they can satisfy their need for information.

With regard to young people, the analysis of the keywords and their associations highlights their demand for convenience (big shopping, habit, near, home, week) and this is consistent with the purchasing profile that characterises this group. The rational approach to shopping leads some young people to buy items requiring high psychological involvement, such as fresh products and fish, from the modern channel.

If I need French fries, I know that I can find them at X, and I know that they have very big bags; on the other hand, if I need fresh fish I go to X and I know that I can find fish there. It's a question of habit.

4.3 The traditional channel choice determinants

Among the determinants of the traditional channel choice, whether it be a long (neighbourhood shops) or short (small manufacturers) channel, for adults the relational dimension stands out. The importance of human relationships clearly emerges: the traditional channel is preferred because it provides the opportunity of establishing a direct relationship with the vendor, as well as for its proximity dimension which favours time-saving. The importance of the human relationship intensified during the COVID-19 pandemic, due to both the restrictions imposed on travel and the sense of solidarity that increased people's sensitivity towards small retailers.

I also shop daily in the village shops to try to help the shopkeepers.

The traditional store has been rediscovered as a place for relationships and socialising, where not only quality products but also convenience can be found.

The changes fostered, or perhaps simply accelerated, by the COVID-19 pandemic, are also reflected in the decision to buy directly from the producer: farms, local markets and wineries. The short channel is preferred for perishable products and is chosen for convenience. Shopping at small producers is a source of pleasure and gratification because it provides access to a qualified offer and is a way to support small businesses.

I started with the lockdown; for example, I started going to the farmer at that time and now I'm keeping that habit.

[…] you also do it to help support small businesses that may have been challenged by the period.

The rational approach to shopping employed by young people also emerges in their attitude towards traditional sales channels: the less importance that these channels have for this segment derives from their search for utilitarian elements that allow speed in the purchasing process. This is not surprising given the limited time available and the need to concentrate purchases; an aspect that can hardly be satisfied by the short supply chain. However, something has been changed due to the effects of the COVID-19 pandemic. Some manifestations of this change can be seen by analysing the literal transcription of the discussion: some participant declarations show signs of openness towards this channel, driven by the human and solidarity dimensions. Therefore, the context of health emergencies has partly changed consumption habits and the awareness that drives product choice decisions.

I've partly kept some of the habits I picked up in the lockdown, like helping small producers.

4.4 The online channel choice determinants

Regarding the online channel, it should firstly be noted that shopping behaviour is strongly influenced by the type of distribution company. The attitude towards the online channel depends on the type of seller: a manufacturer (i.e., an industrial or agricultural company), a modern specialist or grocery retailer (i.e., MediaWorld and Esselunga), a traditional distributor (i.e., a neighbourhood shop with its own e-commerce channel), or a marketplace (i.e., Amazon and E-bay). E-commerce business models are complex and not easily understood by individuals.

Adults use a digital intermediary to purchase products whose characteristics are easily identifiable in advance, such as consumer electronics, but also goods of variable quality and which may be difficult to assess at a distance, such as food. What changes are the players from whom adults purchase the two types of goods: specialist retailers or marketplaces in the first case, small manufacturers or traditional distributors in the second.

For some product categories I prefer human contact; I can buy electronic products online, products whose characteristics I know, but if it's a computer I prefer to talk to an expert.

I only buy rum online because it's a product I like, so I'm looking for types of rum that are a bit special and you can't find them in the supermarket.

The digital context lends itself to satisfying both the need for information and the search for convenience and pleasure. This is possible thanks to the characteristics of the virtual environment: the absence of space and time barriers and the cognitive potential of new technologies allow the consumer to complete the purchasing process efficiently without losing out on the depth of information and the extent of the choice available. Moreover, thanks to the flexibility of digital technologies, it is possible to personalise the shopping experience in favour of the search for gratification. However, this potential does not seem to be grasped by adults who, unlike what happens in the physical dimension, experience online shopping from a convenience perspective: saving time and money.

I see added value in online shopping, it can save me an hour.

Since there are websites like Amazon, you can save a lot of money.

For adults, the digital channel is predominantly associated with utilitarian benefits: the pleasure of shopping is an element that can only be obtained from the experience in the physical shop.

The fact remains that I like to go shopping; I also buy on the internet if there are big savings.

Barriers to purchase, represented by the perception of risk, are one of the reasons why the potential of the online channel has not yet been fully exploited. However, these barriers are also being reduced as a result of the changes induced by the pandemic, which has forced consumers to overcome their distrust of the online channel.

Sometimes I do my shopping online, I started doing it during the lockdown and now I do it occasionally.

To summarise, the virtual channel is experienced by adults in a very different way than the physical one, where the experiential and relational dimensions prevail. The online context seems currently unable to replace the value of the human relationship.

The digital channel plays a central role within the set of purchasing alternatives for young people. The keyword, "e-commerce", is in the second position for frequency of mention and appears in a visibly distinct manner in the conceptual map. E-commerce is considered a complementary channel to those usually frequented: when young people talk about e-commerce, they do not talk about it concerning a specific product, unlike adults. This integration with physical shops is quite clear in the lemmas of the young people segment: the digital channel is preferred for all routine purchases, which do not require a high level of information and whose choice is mainly based on convenience.

I've been buying the same perfume for a few years now and, apart from the first few times, I've always picked it up online because it was cheaper, but it was a perfume I already knew.

While this behaviour is quite similar in adults, some specificities emerge regarding the type of commercial intermediary. Adults prefer brick-and-click operators (distributors or manufacturers that also operate in the physical market) because they feel more reassured. Conversely, young people have no hesitation in using purely online players and easily migrate from one type to another, depending on the information and service attributes that best meet their needs.

The words of young people draw a clear omnichannel scenario: physical and digital channels are alternated according to the benefits sought.

I'm used to it, I do my shopping online, for clothes on sites like Aliexpress, Amazon, Zalando.

For the young, the integration between channels, which does not occur in the physical market, characterises instead the digital context, giving rise to hybrid shopping experiences. They integrate physical and digital channels, exploiting the potential of each according to the decision-making process stage (search for information, evaluation of alternatives, purchase decision). This trait distinguishes the multichannel behaviour of young people from adults.

4.5 Shopping behaviour in a new digital and health environment

Consistent with the stated goal, the research attempts to understand which changes caused by a new digital and health environment will permanently affect shopping behaviour. During the focus group sessions, every participant demonstrated great sensitivity towards issues relating to health, nutrition and sustainability. Some declared that they had changed their shopping habits, making more informed purchasing choices and rediscovering the pleasure of shopping.

The first piece of evidence is the growing integration between the sales channels driven by the need to achieve the benefits outlined in the framework of the new value system. A non-transitory trend seems to emerge that involves an individual's values and beliefs.

Before the lockdown I never needed it. I buy many other things online, but not food, I started with the lockdown. I started going to the farmer at that time and now I have kept this habit.

The second piece of evidence is the increasing value attributed to the traditional channel, appreciated as a retailer capable of satisfying the emerging needs of health, sustainability and convenience. Both groups recognise this vocation and this suggests that the phenomenon could be consolidated, not only for adults who already patronise the channel, but probably even for young people too who found the convenience dimension in the traditional channel.

There is another aspect that qualified this trend as not temporary: the rediscovery of the value of human relationships encouraged by the recent pandemic, which has generated a sentiment of solidarity towards commercial operators. The traditional channel will probably no longer be able to play a secondary role in the future in the set of purchasing alternatives considered by consumers, even by young people.

The lockdown [...] allowed me to rediscover small shops [...] This was also driven by a double aspect: socialisation, because you only went out to shop otherwise you were a prisoner at home, and the second was that the salesman is a local person so you can help them. Once the lockdown was over, I continued to do this type of shopping while I still go to the supermarket by car for mass products [...] but I get food products in the neighbourhood.

The scenario looks different for the digital channel: having grown up during the pandemic, it does not seem to have gained the complete trust of consumers. Those who used it before (mainly young people) have continued to do so and will probably intensify their use of it, extending to new categories; those who approached it only for contingent reasons (adults) will easily abandon it and return to their old habits.

Within the framework of the new value system, e-commerce is seen as an unsustainable purchasing style, both from an ethical (as it takes work away from traditional operators) and an environmental perspective (as it generates intense logistic flows).

Finally, the last piece of evidence destined to stabilise is the growing tendency to plan purchases. In order to save time, consumers pay more attention to preparing the shopping expedition, aware that good planning leads to speed in shopping and budget control. Moreover, this behaviour is consistent with the sustainable lifestyle sought by individuals and this strengthens our belief that it will be a permanent phenomenon destined to spread further thanks to the greater information transparency of digital contexts.

Trying to organise shopping, this habit has remained from the Covid period, try not to go shopping every day. And when you go, for example, once a week I do the big shopping to get everything you need.

For these reasons, in the near future, we can expect a growing demand for sales services aimed at satisfying the time-saving and convenience dimensions of shopping. Among the most appreciated services for this purpose are self-scanning and automatic checkouts, as well as the support of the sales staff in the checkout process.

The demand for time-saving solutions is also expressed in relation to the traditional retailer: a service particularly appreciated by consumers involves the ability to digitise orders (i.e., sending orders via WhatsApp). Consumers would like to carry out some phases of the purchasing process online, such as searching for information and ordering products. Traditional retailers should catch these signals if they want to maintain and reinforce their relationship of trust with consumers.

It would be fantastic if they kept this service because you arrive, take the shopping, pay and go away, you avoid the queue!

5. Conclusions and recommendations for further research

During the last two years, due to the global pandemic, grocery retailing has experienced a profound digital acceleration along the purchasing processes. It is still difficult to estimate how much of these changes will be consolidated in the coming years, but there is no doubt that the consumer journey, at least in some phases (i.e., pre-shopping), has undergone changes that are destined to remain. Some digital technologies (e.g., mobile apps, mobile payments, click and collect) have brought advantages in terms of convenience and time-saving that consumers, especially the younger generations, will probably not give up in the near future.

This work was designed to answer the literature call for more research on the way consumers have changed their purchasing and consumption habits (e.g., Sheth, 2020; Verma and Gustafsson, 2020). Specifically, this research has enriched the knowledge on shopping behaviour in the current market scenario by identifying changes in the main drivers of grocery store choice, in the nature of choice drivers (rationale vs hedonistic) and in the benefits sought (time-saving vs searching for information). Finally, the research has attempted to understand the transitory or permanent nature of these changes. The results obtained with this work are useful for identifying possible lines of future research, given the exploratory nature of the research conducted.

The work reveals some initial interesting insights from which useful implications can be drawn from both a theoretical and a managerial point of view.

Firstly, integration among purchasing channels is widespread, confirming the pervasiveness of the changes taking place due to the digitisation of the consumer journey. If multichannel shopping is a feature common to the two sample groups, what changes is the nature of its determinants: basically utilitarian for young people and hedonistic for adults. This translates into the type of integrated channels: while multichannel behaviour in the adult segment has a predominantly physical nature and is driven by hedonistic and relational factors, young people are implementing an increasingly "phygital" experience. They integrate physical and digital channels, exploiting the potential of each shopping dimension according to the decision-making process stage (search for information, evaluation of alternatives, purchase decision). Digitisation thus spreads along the different stages of the decision-making process, from the initial contact phase to the loyalty phase.

Such behaviour is potentially destined to permanently change shopping habits, considering the absence of the term "COVID" in the thoughts expressed by young people and the low frequency with which adults mentioned it. For this reason, it would be useful to measure the weight of the different determinants (both hedonic and utilitarian) in the two groups (young people vs adults) through a survey in order to: 1) confirm the results obtained in the present research; 2) identify, for each group, the key drivers of purchasing behaviour in the different channels.

From the point of view of managerial implications, this information is particularly relevant for retailers as they can use it in their management of the 4Ps. Specifically, depending on the importance of the hedonistic rather than utilitarian components, the retailer can develop ad hoc price, communication and assortment strategies for consumer segments. Moreover, these components can be leveraged online in order to personalise offers and communications.

Secondly, the COVID-19 pandemic has contributed to making latent needs - that now cannot be ignored - visible (the value of human relationships, time-saving services, sustainability): the store - whatever it is, physical or digital, modern or traditional, big or small - must be rethought considering which values consumers are searching for and the multidimensionality of shopping behaviour.

The research clearly shows that the physical experience can hardly be completely replaced by the virtual one, but consumers will tend to experience both depending on the nature of the purchase and the shopping needs. Retailers, therefore, who are able to deliver a hybrid sales service will certainly gain a competitive advantage. In particular, the integration of sales channels can satisfy both the convenience dimension - through information on products available in the store, the digitisation of the order or checkout - and the experiential dimension - through initiatives that make shopping in the physical place [more] pleasant. It might be useful for future research to specifically investigate the services required by consumers in the various product categories, as well as the importance of the experiential dimension in the purchasing process between channels.

To conclude, the gaps emerging during the pandemic must be seen as an opportunity to identify what the future direction of sales innovation should be. Compared to the past, the relational element has clearly emerged from the results. In a process of renewal and transformation, it is, therefore, necessary to consider the value of relationships between consumers and commercial operators: the wish to "*make the supermarket more human*" cannot be ignored. Human capital and technology represent the two assets to be exploited and to be taken on as drivers in the development of innovative sales approaches.

This work was the first attempt to understand whether - and which - changes in the digitisation of the consumer journey will be transitory or permanent. Given the importance of the changes that have taken place in the last two years on an economic and social level, the topic addressed by this exploratory research is of extreme interest and relevance for companies and will, therefore, need to be monitored in the coming years.

Finally, there are two further directions in which this research could be expanded. Firstly, this work should be repeated by investigating the purchasing behaviour used for other product categories in order to understand any sectoral differences. Secondly, a quantitative analysis should be carried out to understand the extent and nature of the phenomena that emerged.

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