The Impact of Covid on consumer behaviour:

The product category of sauces

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ABSTRACT

This research explores the impact of Covid on consumer buying behaviour, specifically in the sauces category. This study was done in collaboration with the Marketing Futurecast Lab project which provided the means for data collection to support this research. The study followed a qualitative methodology, based on the ethnographic method; and was conducted based on two methodologies: In Situ, holding dinners at chosen families homes and Shadowing, observing the buying behaviour of an individual. We concluded that although the pandemic, in general terms, have caused changes in the consumption and purchasing habits of families, when we analyse the category of ketchup and mayonnaise products specifically, no such impact was observed. In fact, we could see only slight changes in quantities purchased, mainly ketchup, which consumers assume they will keep after the pandemic. But no variation could be considered significant. However, given the qualitative nature of the research, the study allowed us to identify some suggestions from the point of view of the management and communication of this category, specifically in relation to decision-making agents, type of demand and impact of sales promotions

Keywords: Customer Behaviour; Covid; Online Purchasing; FMCG; Grocery Retail.

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1. INTRODUCTION

We are living through a period of strong changes due to the new coronavirus (SARS-CoV-2), which has given rise to a disease called by the 32 World Health Organization, COVID-19, that started in China and quickly spread around the world (Velavan and Meyer, 2020).

The pandemic then changed the eating habits of consumers and the stress caused by all the uncertainty changed their behaviour (Yau & Potenza, 2013). Stress inevitably led people to eat more, mainly food with large amounts of sugar, “comfort food”, defined as “food craving” (Rodríguez-Martín and Meule, 2015), as it helps to reduce stress levels (Ma et al., 2017). At the same time, during confinement, people began to worry about having a healthier and more balanced diet, with the aim of maintaining good health and reducing health risks (Renzo et al., 45 2020; Sidor and Rzymski, 2020). Although during the lockdown many restaurants were closed, people were able to resort to home delivery, either directly from the restaurant or from other platforms (eg: UberEats and Glovo) (Li et al., 2020).

Covid-19 not only caused major changes in people's behaviour, but it also conditioned psychological changes (J.J. Van Bavel, et. all, 2020). The economic crisis caused by the pandemic affected consumers both socially and financially. Additionally, unemployment increased, inflation expanded, wages decreased or froze and purchasing power decreased. Unfortunately, this is the reality for many people, which influences their buying behaviour (Shubha Goswami and Vineet Chouhan, 2020). Many families were financially affected and were forced to rethink their spendings and ways to buy. And like consumers, retailers were forced to adapt to this whole situation. For example, retailers had to respond to the changing needs of many consumers, serving them at home, as well as solving the difficulties of inventory, supply chain management and delivery. It is therefore important for retailers to understand the new needs of consumers at this time, but also to predict how their behaviour will be in the post-pandemic.

The pandemic accelerated e-commerce (Kim, 2020). Fear and constant uncertainty impacted consumers' perceptions of the benefits of e-commerce (Tran, 2021). There has been a huge increase in online shopping since Covid's inception, as many people decided to enrol in it. The main question is whether people will continue to prefer online shopping over offline, and if this behaviour will continue in the post-pandemic. This is what we should be asking ourselves about all the other changed consumer’s habits. When this whole situation is over, will consumers maintain their new habits, or will they go back to the ones they had before Covid-19 hit?

With the aim of concluding which behaviours would remain in the post-Covid period, changes in consumer purchasing and consumption behaviour before and during the pandemic were studied. Regarding all the facts mentioned, it seems of extreme importance to understand the impact of this pandemic among consumers.

The objective of this study is to understand the changes caused by the confinement, what will be the purchasing and consumption behaviour of consumers and how information will be shared, especially regarding the sauce category.

This project is divided as follows first, the part consists of a literature review related to the following topics: customer journey, consumer behaviour framework, online shopping, purchase environment, organic and vegan products search, grocery retail industry and Covid, sauces contextualization. Then, a deeper analysis of the main topic of this thesis – the sauces market - will take place. In the following chapter, the methodology is deepened with the development of two empirical studies, analysis, and discussion of results. The study followed a qualitative methodology based in an ethnographic study, with the In Situ and Shadowing methodologies. The sample was composed by 52 families, and we spent 2 nights, including dinner, in each family's house, and observed 54 people going to the supermarket, in order to understand the impact of the pandemic. This methodology allows a deeper understanding of the consumers' reactions.

Finally, the main conclusions will be presented and some limitations that emerged during the course of this study, as well as suggestions for future research, will be presented.

2. LITERATURE REVIEW

Since this study is based on the impact of the pandemic on consumer behaviour, it is important to first explore the main concepts of consumer behaviour theory, with a special focus on FMCG purchasing habits and the online format. In this sense, we will address the following topics: consumer behavior framework, online shopping, purchase environment, organic and vegan products search, grocery retail industry and covid, and sauces contextualization.

2.1. Customer Journey

The analysis of consumer behavior is not only about the moment of purchase, but also about the before and after purchase ("Customer journey"). In fact, the purchase/consumption of a good or service is usually not a spontaneous and fleeting act, but the effect of a psychological process of internal conflicts. It is important to understand that it is not a single digital touch-point that dictates the behavior of a consumer, as we mentioned above.

Much of the literature about consumer behavior was and is built on two assumptions. The first is that consumer behavior can be influenced by multiple factors, such as surrounding influences (culture, subculture, social class, family, etc.), individual differences and influences (motivation, attitudes, personality, values, etc.), and finally psychological processes (information processing, learning, and behavioral changes) (Engel et al, 1993). The second assumption is that consumers are rational in their decision making and have the ability to follow themselves through a sequential process in order to make a right choice from among the various possible alternatives. Currently, this assumption of decision rationality is highly debated.

In the scope of the customer journey is included the decision-making process. Something that has been studied extensively, going back to studies in the 1990s, which identified 5 phases of the process:

1) Recognition of the problem;

2) Search for information;

3) Evaluation of alternatives;

4) Purchase decision;

5) Post-purchase behavior / evaluation.

In phase 1, problem recognition, we have to understand that the consumer, throughout his life and with regard to consumption behavior, has to solve some problems and therefore make some decisions. Decisions are not identical. We can distinguish between complex problem solving decisions (they involve risk, are usually not very regular purchases and of high monetary value); limited problem decisions (simple purchase decisions, where the case under analysis is included); and frequent problems (they do not require much information search, are more frequent and routinely made purchases).

The predisposition to accept or not a product results from a multitude of psychological factors generated and that can, however, according to the authors Kotler and Armstrong (2010) be influenced either by internal stimuli (such as hunger or thirst) or by external stimuli (such as advertising messages or an opinion coming from a reference person/group - marketing activities and brand communication). This process causes a conflict, conscious or not, which manifests itself through the question "do I buy or not?"

In the information search phase, the consumer seeks to reduce the conflict created by the process described above and may be conscious, involving very detailed research and support in studies, or unconscious.

The information search may have two types of sources: internal sources - the consumer resorts to relevant information stored in his memory about the knowledge he has about the products; and external sources - are applied when the internal sources do not prove to be sufficient to meet consumer needs and involves the personal interaction of WOM (word of mouth) by other consumers or reference people/groups, or market interaction through communication such as advertising. The case under analysis is based on the typology of external sources and seeks to assess their impact.

Phase 3, the Evaluation of Alternatives, is the most delicate. Consumers evaluate products and services by combining their beliefs about the brand, or brands, they know and assigning the relative importance they attach to that criterion.

Something important to mention is the fact that price is one of the variables that deserves emphasis and that can perform three distinct functions in the purchase process:

- Limiting the market of potential buyers;

- Allow direct confrontation between competing products;

- Being a measure and expression of value that the consumer attributes to a good, according to the intensity with which he or she wishes to acquire it.

Brand and price are the most popular evaluation criteria in the literature. However, in this analysis consumers search for information based on one of the criteria considered most relevant: the brand. If they do so, it is because the brand already has a strong reputation and makes it belong to the set evoked by the consumer, and on the other hand the brand appears as a more determining factor than the price.

The Purchase Decision, phase 4, is, according to most authors, the least complex act of the process in question. This finding is based on the assumption that the conquest of the consumer is not made at the moment of the final choice of the product, but before and during the process that leads to the decision. The authors Engel, Black and Miniard (1993) identify three categories of purchase decisions:

-Totally Planned Purchase - the brand and the product are chosen before visiting the shop;

-Partially Planned Purchase - there is an intention to buy a certain product, but the brand selection is made only afterwards;

-Impulse Purchasing - the product and brand are chosen in the shop.

2.2. Consumer Behaviour Framework

2.2.1. Ajzen’s Theory of Planned Behaviour

Ajzen's Theory of Planned Behaviour (1985), consists of an expansion of the Theory of Rational Action (TAR), proposed by the same author, with the addition of an explanatory variable of consumption decisions, the "behavioural control".

This theory holds that the final decision to perform a certain behaviour depends on the intention to perform it, but also on the probability of success perceived by the consumer, as well as the consumer's subjective evaluation of the risks and benefits resulting from that behaviour.

According to this theory, the behavioural decision is thus based on three types of explanatory variables: (i) attitude, (ii) subjective norm and (iii) perceived behavioural control.

Although several authors have found some limitations in this theory, such as the fact that fear, mood, past experiences, and economic and environmental influences are not considered factors of behavioural intention, and consumers have proven to be increasingly sensitive to them.

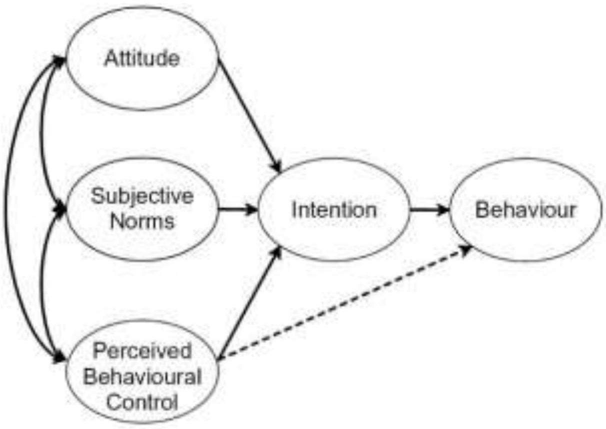


Figure 1 Theory of Planned Behaviour, Ajzen (1985)

2.2.2. Foote-Cone-Belding (FCB) Model, Richard Vaughn (1980)

Richard Vaughn's model (1980) addresses the relationship between consumer behaviour and products, allowing the evaluation of the adjustment of different communication strategies (advertising, for example) with different products.

It consists of a quadripartite double-entry grid resulting from the combinations of 2 factors: the degree of consumer involvement with the product (high or low) and the type of cognitive activity predominant in the consumption decision of that product (reason-think or affect-feel) (Matusinska & Stoklasa, 2021). Resulting in 4 product categories: "informative"; "affective"; "habitual"; "satisfaction":

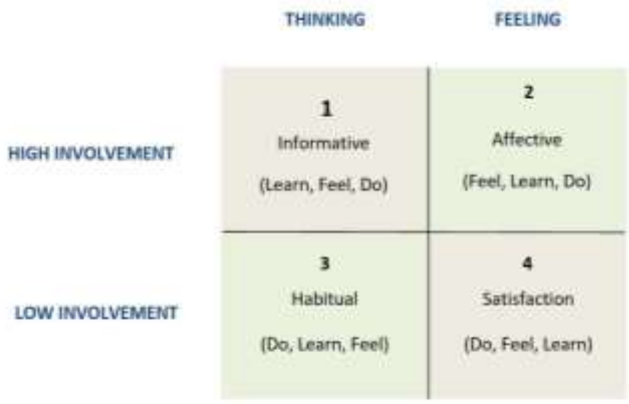


Figure 2 Foote-Cone-Belding (FCB) Model, Richard Vaughn (1980)

2.2.3. Consumer Behaviour Model

All our decisions are influenced, there are several factors which affect consumer choice and whether we buy or not a certain product or service. For instance, reasons can range from demographic and social economic to personal reasons like our mood. These factors can explain why we are shopping and whether we feel pressured when we are buying or consuming.

According to Solomon, M.R., Bamossy, G.J., Askegaard, S., and Hogg, M.K. (2015) the shopping experience is divided in three parts and the factors that influence our choice are different depending on the phase: antecedent states, purchase environment and post-purchase activities.

Regarding antecedent states factors, mood and emotions, shopping orientation, situational and temporal factors can really influence consumer choice. For example, if the consumer at the time of purchase feels happy and satisfied, it is normal for him to be more engaged with the brand and willing to buy (Solomon, M.R. et al, 2015)

Nowadays, the consumer is increasingly influenced by the experience, and their engagement depends on and is conquered through it. Retailers have to worry about offering a different experience to their consumers, and the store image and atmosphere are crucial to achieve it.

Another factor that increasingly influences the purchase decision of consumers is product disposal since the concern and environmental awareness has been increasing.

Figure 3 Issues Related to Purchase ad Post Purchase Activities (Solomon et al., Consumer Behaviour: Buying, Having, and Being, 11th edition, 2015)

After studying the 3 models above, we chose to use Solomon's model as it is the most complete and in addition it includes the antecedents of purchase, the purchase, and the post-purchase.

Thus, we decided to start with the antecedent states, such as the customer behaviour towards the FMCG shelf and the reasons and models for buying online from the perspective of consumers. Then, the purchase environment, by analysing the promotions influence on FMCG purchase. Lastly, the post purchase processes, such as the search of organic and vegan products.

2.3. Online Shopping

On the demand side, when we talk about the intention to buy online, it means the willingness of customers to make an online purchase and to compare the prices of various online retailers (Iqbal, Rahman, and Hunjra, 201; Pavlou, 2003). Online purchase intention refers to the strength of the consumer 's plan to carry out a particular purchasing behaviour over the Internet (Salisbury, Pearson, Pearson, and Miller, 2001). Online shopping is a convenient way to buy something and save time, but customers often feel unsure about sharing personal information or cards over the internet (John Horrigan, 2008).

One of the biggest challenges for online sellers is to attract customers and convince them to make purchases online and not offline (Belhan et al., 1999). With covid-19 and the consequent measures of social distance, the purchase of food products online has been growing. Supermarkets have adapted according to the needs of customers and this change in behaviour (PwC, 2020). It has been estimated that almost one-third of consumers spent more on grocery products, during Covid pandemic (Everett, 2020).

Regarding the supply side, the introduction of online shopping impacted and disrupted the entire industry, as well as identified consumer problems in adopting innovations (Hoffman, Novak, & Peralta, 1999). Moving from physical to online shopping requires the approval of new technologies and the overcoming of functional and psychological barriers by consumers (Grabner-Kraeuter, 2002).

The innovation of online shopping has generated uncertainty (Grabner-Kraeuter, 2002), increases in perceived risk (Miyazaki & Fernandez, 2001), scepticism, and distrust (Grabner-Kräuter & Kaluscha, 2003). Consumer trust reduces consumer uncertainties (Luhmann, 2000) and therefore facilitates the willingness to use technological innovations (Gefen, 2000; Gefen, Karahanna, & Straub, 2003). Hansen (2005) recognized risk as a minor discriminating factor and complexity as one of the main factors in online grocery purchases.

The advantages of online shopping are saving time, being a convenient purchasing technique and easy to buy (Webcheck, 2000). Possible to purchase anywhere and anytime. Possibility to purchase different types of products and at the same time in a few places. Consumers can share their feedback and share with others. Time is an important forecaster of online shopping (B. Foucault, 2002). Easy access to a lot of information (Marry De Swatdt, 2008).

The disadvantages are the fact that it is not possible to try, feel, and touch the products before the purchase (North et al., 2003). Moreover, security concerns and unfamiliar merchants.

It is now important to understand the different types of consumer segments in relation to online shopping.

2.3.1. Online shopping customer segments

The segmentation analysis about the beliefs of online consumers about the importance of the characteristics of buying groceries online resulted in 3 different segments **(**Frank, D.A., & Peschel, A.O., 2020)**:**

- **Segment 1:** “price-oriented” customers, because they reveal the highest values in price, product assortment, correct and fast delivery of the ordered goods;
- **Segment 2:** “time optimizers”, because they reveal the highest values in time saving and independence of opening hours, scores second highest in price and lowest in choice of best before date;
- **Segment 3:** “cautious” customers, because they reveal the highest values in personal service, the trust mark score of the retailer and the retail chain brand.

Regardless of segmentation there are factors that influence online shopping intent.

2.3.2. Factors Influencing Consumers ‘Online Purchase Intention

The variables that affect the intention to buy groceries may be different from those of durable goods (Van Droogenbroeck & Van Hove, 2017).

Motivations to buy grocery online: habit, convenience, and time efficiency (Anesbury et al., 2016; Morganosky & Cude, 2000) and consumers are more demanding in relation to product quality and delivery process (Frank & Peschel, 2020; Seitz et al., 2017). According to most studies, convenience and time saving are the biggest motivators of online shopping, and the main obstacle is perceived risk (Blitstein, Frentz, & Pitts, 2020; Handayani, Nurahmawati, Pinem, & Azzahro, 2020; Harris, Dall’Olmo Riley, Riley, & Hand, 2017; Mortimer, Hasan, Andrews, & Martin, 2016).

Consumers with time and physical restrictions are the most likely to start shopping online, since for them the risk is less of a concern (Morganosky & Cude, 2000; Elms, de Kervenoael, and Hallsworth, 2016; Hand et al., 2009). Price is the most effective way to stimulate consumers who are price sensitive (Brassington & Pettitt, 2006). However, Price may be less important in the online grocery retailing environment (Benn, Webb, Chang, & Reidy, 2015; Melis, Campo, Breugelmans, & Lamey, 2015), but the results are mixed (Degeratu, Rangaswamy, & Wu, 2000).

Additional of price issues, consumers want an easy system, user-friendly, (Jaaf, and Ong, 2009), they buy if it doesn´t require much effort (Teo, 2001). Website features are important to determine perceived ease of use (Zeithaml, Parasuraman, & Malhotra, 2002; Beldona, Morrison, & O'Leary, 2005): simple process flow, flexible and easy to teach (Rahman et al., 2013), effective product searching and easy checkout process (Yang & Mao, 2014).

The online experience also influences the consumer's buying behaviour (Hansen, 2008; Mortimer et al., 2016). Customers are loyal to their offline chain in the beginning of innovation adoption, but their shopping priorities change over time (Dawes & Nenycz-Thiel, 2014; Melis et al., 2015). The importance of assortment, also, increases with increasing experience (Melis et al., 2015).

A study carried out by Blitstein, J.L., Frentz, F., & Pitts, S.B.J. (2020), in Germany and in the US, to study motivations of those who buy groceries online, identified 51 benefits, organized into 8 motives (economy, availability and variety, stressors, confort, innovations, physical/structural barriers, food knowledge and social image and lifestyle). The motive most cited by respondents was "economy", consumers´ belief that online food shopping offers a benefit in terms of cost and efficiency.

Regarding personal values, M. Rokeach differentiated 2 types of values: Instrumental and terminal values and for him "values are determinants of attitudes and behaviour that are substantially or logically related to them". Dietz Stern and W.C. Black argued that personal values and consumer behaviour are related. A study done by Dong-Mo Koo presented the idea that personal values influence the way the online buyer evaluates the seven different characteristics. It is concluded that the following values: mature society, happiness and esteem in life are the main motivators (in a positive or negative way) of online consumption, but they have different impacts. High esteem life demonstrated positive effects in the evaluation of attributes, but values of matured life and happiness demonstrated negative effects on loyalty. It was also possible to conclude that only one attribute, product assortment, is positively and strongly associated with loyalty in the store. Thus, to attract and retain customers it is necessary to stock a variety of products in online stores. In addition, they believe that security can harm them when buying online.

The comparison between shopping time done online or in store is not obvious, because it is believed that the profiles of the buyers of both are different. There are studies that say men prefer online shopping more than women (Souitaris and Balabanis, 2007; Wood, 2011) and others that there are more women preferring it (Montgomery et al., 2004; Morganosky and Cude, 2000). Overall, most grocery shoppers are women, but online, most are young and tend to have higher incomes. There are big differences in the average durations in the stores that several authors have arrived at, all suggest that the time per category is at least 2 min. After the checkout time has been removed, we can conclude that the time spent in the store by category is high, probably because much of the time spent in the store is moving around and not selecting products (Hui et al., 2009).

A study carried out to evaluate the decrease in time taken to shop over time (Anesbury, Z., Nenycz-Thiel, M., Dawes, J., & Kennedy, R., 2016) concluded that selection times became faster. The average time to select the first category from the first retailer was 33 seconds, but in the 12th selection it decreased to 15 seconds. We can consider that buyers can learn to buy products online faster on a specific website.

In physical stores, the customer has all products organized by categories and on shelves, to decide (usually quickly and in seconds) the buyer uses physical movement and visual recognition. While in online supermarkets, consumers are faced with several categories with many brands, and only a small part of them are displayed on a page. Online customers do not spend a lot of time viewing multiple pages by category. The products on the first page generate more purchases and the number of pages viewed is small (Breugelmans et al., 2006). Anesbury, Z., Nenycz-Thiel, M., Dawes, J., & Kennedy, R, (2016) concluded that the number of pages viewed is quite low, with an average of only 1. 85% of selections were made after viewing 1 page in a category and only 2% were made after viewing 5 or more pages. Online shoppers are not very willing to look for many brands on the various pages of a website.

Online consumers use different tools: ability to sort (Breugelmans et al., 2006), number of items displayed to the shopper on each page (Lohse and Spiller) and navigational tools (Waite, 2006). New online consumers may have less willingness and knowledge to change the default display settings. Time minimisation is important for consumers.

After understanding the 3 main models of consumer behaviour, and of online shopping, in terms of segments, segment profiles and factors that determine purchase intention, it is important to explain the issues related to the shopping environment.

When we talk about shopping environment, we include issues related to consumer behaviour towards the FMCG shelf, the impact of sales promotions, the particular case of organic and vegan products.

2.4. Purchase Environment

2.4.1. Customer behaviour towards the FMCG shelf

There are several authors and, consequently, studies on the topic Consumer Behavior facing the Shelf FMCG. These studies cover the different factors that influence the behavior of consumers towards the shelf, such as organization of the shelf, number of facings, rack layout and consumers' beliefs.

In-Store Marketing

Consists of carrying out marketing strategies in a store that aim to increase awareness and stimulate different products in order to attract the attention of customers. These strategies can make consumers consider the purchase of products, which can mean a sales increase. There are several factors in stores, such as the number of facings and their organization on the shelf, whether they are positioned vertically or horizontally on the shelf, and the price. These factors can, therefore, be used by retailers in managing the arrangement of shelves, keeping the arrangement category constant (Chandon et al., 2009). These factors can impact consumer attention (Janiszewski, 1998; Lohse, 1997), brand sales (Drèze, Hoch & Purk, 1994) and perception (Chandon et al., 2009).

Organization of the Shelf

There are two types of displays in the organization of the shelf, which means, the way products are arranged on the shelf: vertical display (from top to bottom) and horizontal display (horizontally). Chandon et al. (2009) carried out a study in eight shopping centers in the United States in order to understand the influence of the display position on consumers, through the analysis of consumer attention and assessment of the products. The study was carried out using bar soaps and pain relievers exposed in 4 levels of vertical (first, second, third and lower shelf) and horizontal (extreme left, center left, extreme right and center right) positions.

This study concluded that the position of the facings on the shelf really influenced the consumers' attention, however it not always improved the evaluation. Attention was influenced most positively when the product was at the top of the shelf and least positively when it was in the middle of the shelf. Choice increased by 20% when the product was placed at the top of the shelf rather than the bottom, with 36% of the gains in the evaluation coming from attention. Regarding the horizontal display, placing the product in the center of the shelf, instead of placing the product on the edges, increased the choice by 17%. However, these gains came from attention and not from changes on the assessment. Thus, it is concluded that a vertical display (putting products at the top of the shelf) had a more positive impact on visual attention than the horizontal display (Chandon et al., 2009).

Shelf placement can boost visual attention and predict consumer choice, although the results are opposite (Gidlof et al., 2017).

Bialkova, Klaus and van Trijp (2020) carried out a study with the objective of comparing the differences between the results in the store and in the lab, regarding the effects of positioning the products on the shelf. Both situations showed that the results were better for brands that were placed on the right side of the shelf. From the study it was possible to observe that the brand placed on the right side of the shelf was the one most likely to be chosen. But this could be a consequence of the fact that customers approach the shelf from the left side, which can mean that the side from which customers approach the shelf can influence consumers' attention and decision.

Otterbring, Wästlund & Shams (2019) conducted a study with the aim of understanding the relationship between the time it takes consumers to detect a product and its vertical positioning on the shelf. The study was done by allocating, at random, premium and budget products on the shelves. It was possible to conclude that customers identified more quickly the premium products that were placed according to their value (top position). Budget products, on the other hand, were more easily identified by customers when placed incongruously in relation to their value (top position). We can conclude that customers tend to look to the top of shelves, regardless of the purpose of the purchase.

Number of facings

Chandon et al. (2009) carried out a study which demonstrated that the number of facings strongly affected visual attention and evaluation. It was also possible to notice that a brand with lower market share, in the studied category, doubling the number of facings showed improvements in terms of re-examination (26%), observation (33%), consideration (22%) and choice (67%). Regarding an average brand, doubling the number of facings also led to increased reexamination (28%), observation (35%), consideration (10%), and choice (10%). These studies are also supported by the study by Gidlof et al. (2017).

Rack Layout Orientation

Another factor influencing customer attention and decisions is shelf orientation. Mowrey, Parikh and Gue (2019) realized a study that consisted of simulating different layouts and algorithms according to two types of consumer travel: unidirectional travel and bidirectional travel. The study showed that unidirectional travel, exposure was highest when the racks had a 30 degree acute orientation (almost 250% more exposure than racks with 90o). The result was the same for bidirectional travel, with the exception of situations where consumers make wider head movements, in this situation racks with less acute orientation revealed greater exposure.

Through the study, it was also possible to conclude that retailers should choose the orientation of the shelf layout that best suits a certain section of the store, as there are trade-offs between different factors (display, intensity, space and shelf orientation format).

Beliefs held by consumers

Customers have different opinions and beliefs about how retailers put products on the shelf taking into account various factors such as price, popularity, promotional status of the product (Valenzuela, Raghubir & Mitakakis, 2013). Customers believe and expect that premium products are displayed in the top positions, that promotional products are at the ends of the shelf and popular products in the middle. The fact that retailers do not live up to consumer expectations can lead them to feel frustrated (Meyers-Levy & Tybout, 1989), less satisfied and can decrease the likelihood of consumers making a purchase or returning to the store (Valenzuela, Dhar & Zettlemeyer, 2009).

2.4.2. Promotions influence on FMCG purchase

Sales promotions represent the value associated with a certain product or service and aim to stimulate the brand's sales during a certain period, through a special offer to the consumer in order to stimulate their interest. This interest can be converted into purchases and consequently lead to increased sales. Some studies argue that sales promotions can increase brand preference (Davis et al., 1992; Rothschild and Gaidis, 1981).

Schneider and Currim (1991), Henderson (1987), Blattberg and Neslin (1990) argue that there are several types of sales promotions, which consequently lead to different promotional responses and have different purchase responses. Sales promotions can reduce brand loyalty, increase brand switching, negatively alter the perception of quality, and increase price sensitivity (Keller, 1998).

Nathwani (2017) believes that price discounts are the strategy that most influences, the preferred one, and the one that most attracts consumers to change brands. According to Karthikeyan and Panchanatham (2013) the offer of gifts, saver packs offer, sweepstakes and discount offers are the most dominant techniques.

Sales promotions depend on consumer behavior and preferences. Goyal (2019) believes that consumer preferences are constantly changing and their behavior changes according to product category and prices. Goyal (2019) also concluded that price discounts accelerate consumer purchases. While when it comes to samples, coupons or cash back offers, consumers are willing to change brands or products. Regarding gifts (premium techniques), consumers tend to buy more and even more than they can afford.

It is important to analyze in detail the impact of discount prices and coupons in different situations, as they are the most used and known strategies. Montarezi, Tamaddoni, Stakhovych and Ewing (2020) studied in an Australian FMCG retail market how different types of coupons (percentage-off or price-off) impact customer spending, basket size and the time spent between purchases. They concluded that both have a positive effect on consumers' expenditures and basket size, but that the off percentage turned out to be a bit more effective. Price promotions can negatively impact future choices as they can reduce customer perceptions of brand quality (Dodson, Tybout, & Sternthal, 1978), making them wait for new promotions (Mela, Jedidi, & Bowman, 1998) and also reduce consumer expectations regarding the price of the brand (Monroe, 1971).

DelVecchio, Krishnan and Smith (2007) executed a study in the United States with the objective of understanding how the promotion frame (percentage-off and cents-off) influences the consequences of promotions on the expectation and choice of price after promotions. The central issue is that consumers create a price expectation based on the promotion discount and not so much based on the discount itself. In this sense, the value of the discount is diluted in term of consumer´s perceptions.

The effects of sales promotions can last longer than just the moment they happen (DelVecchio, Henard, & Freling, 2006), with post-promotion effects. They can also influence consumer choices in times of stockouts (Diels, Wiebach, Hildebrandt, 2013). In these situations of lack of stock and regarding products of great involvement, consumers are willing to exchange for a substitute product to their preference, when it is not available, regardless of whether their preference is on sale or not (Diels et al., 2013). If, when a sales promotion is being carried out, there is a stockout, consumers can choose to buy products from substitute brands (Diels et al., 2013). In these situations, there is a reverse impact of the promotion: the promotion stimulates the purchase of the product regardless of the brand that communicated it (Tversky, 1972).

Furthermore, the fact that similar products are on sale leads to an increase in the reverse similarity effect in out-of-stock situations, as the substituted product becomes dominant. On the contrary, if a different alternative is at a lower price, the reverse similarity effect can be compensated for (Diels et al., 2013). In these situations, the reverse similarity results increase even more for similar substitute promotions.

Blattberg and Neslin (1989) believe that regarding post-promotion effects, there are techniques associated with positive and negative results that can happen at the same time. DelVecchio et al. (2006) report that post-promotion brand preference can be affected by two factors: promotion and product characteristics. On the other hand, methodological and consumer characteristics do not significantly influence. Regarding the characteristics of the promotion itself, the post-promotion preference is greater when the discount is a coupon and when the offer is premium. Promotions that are 20% or more of the product's value undermine their brand preference in post-promotion (DelVecchio et al., 2006).

In the context of the analysis of FMCG it is fundamental to analyse the specific case of organic and vegan products and consumers' motivations for consumption.

2.5. Organic and vegan products search

Based on the literature, we realize that there is a wrong idea, both from consumers and from producers and retailers, in distinguishing what is organic (Guthman, 1998; Raynolds, 2000; Stanton & Guion, 2015; Vega-Zamora, Parras-Rosa, Murgado-Armenteros and Torres-Ruiz, 2013a).

However, due to the increase in the organic industry and markets, which has been growing at a rate well above conventional food, the interest of academics and managers towards the organic concept is increasing (Cushman and Wakefield, 2017). This growth is constant and even during crises there is an increase in consumption. We have the example of the time of avian influenza or E. coli epidemics in China, when the fact that the perception of food risks changes, makes consumers picking for more organic products (Tiozzo, Mari, Ruzza, Crovato, & Ravarotto, 2017; Hasimu, Marchesini, & Canavari, 2017; Prentice, Chen, & Wang, 2017). The market for organic products also showed an unexpected growth during the 2010 financial crisis, when most industries were in decline and others were collapsing (Mascitelli et al, 2014).

With regard to consumer motivations, there are several reasons identified by various authors, but the level of importance of each one is not the same for all (Bryla, 2016; Wojciechowska-Solis & Soroka, 2017). An important feature in developed countries is “free of harmful ingredients” (but not in developing countries), as people try to avoid synthetic pesticides (Henryks et al., 2014; Schrank & Running, 2018), chemicals (First & Brozina, 2009; González, 2009; Zagata, 2014), additives (Zakowska-Biemans, 2011) and non-GMO content (Zepeda, Chang, & Leviten-Reid, 2006). Product quality and support for local farmers also motivate consumers to buy organic products, and are even willing to pay more for fair products for farmers (Pugliese et al., 2013; Hamzaoui-Essoussi et al., 2013; Kesse-Guyot et al., 2013 ; Manohar et al., 2012).

Also, consumers tend to associate organic products with tastier than normal foods (Aschemann-Witzel & Grunert, 2015; Grunert & Juhl, 1995; Hjelmar, 2011; Kriwy & Mecking, 2012; Magnusson, Arvola, Hursti, Åberg, 2003; Mostafa, 2007), despite blind tastes do not offer support for the claimed sensory qualities of organic food (Bourn & Prescott, 2002; Ellison, Duff, Wang, & White, 2016; Fillion

& Arazi, 2002). Furthermore, consumers believe that organic foods are healthier than conventional ones (Aschemann-Witzel & Grunert, 2015; Grunert & Juhl, 1995; Hjelmar, 2011; Kriwy & Mecking, 2012; Magnusson, Arvola, Hursti, Åberg , 2003; Mostafa, 2007). However, there is no medical study that confirms this health theory (Baranski et al., 2014; Dangour et al., 2010; Hutchins & Greenhalgh, 1995; Magkos, Arvaniti, & Zampelas, 2006; Smith-Spangler et al., 2012). Although there are no studies that prove the reasons identified above, the truth is that consumers always associate organic products with tastier and healthier products. In addition to the fact that one of the main reasons for purchasing this type of product is health concern (De Oliveira Sampaio and Gosling, 2014; Magnusson et al., 2003; Fotopoulos and Krystallis, 2002; Harper and Makatouni, 2002; Lockie et al., al., 2002).

Environmental concerns have also become a major reason for consumers to shift from normal products to environmentally conscious products, such as organic ones (Mostafa, 2007; Ottman, Stafford, & Hartman, 2006). Despite being a general behaviour, it can happen mainly in younger generations, such as millennials, because they "characteristically, are very sensitive to social values, worries about the sustainability of the environment, have higher income" (Ivanova et al., 2019; Valentine and Powers, 2013) and they consume more organic products than the other segments (Organic Trade Association, 2016). And associated with environmental concerns are also concerns about animal welfare (Hjelmar, 2011; Hamzaoui-Essoussi and Zahaf, 2009; Chen, 2007).

Nevertheless, consumers also identify some obstacles to the consumption of this type of products. Two of the barriers are satisfaction with conventional foods and lack of perceived value (Davies et al., 1995; Fotopoulos and Krystallis, 2002). González (2009) and Lillywhite et al. (2019) also believe that lack of knowledge and shorter shelf life are barriers to purchase. The main barrier is the availability of this type of products, even in more developed countries, it is often difficult to have access to organic products, especially compared to conventional ones (Massey et al., 2018). According to Kushwah et al. (2019) availability was identified as a barrier in 53% of selected studies. And concluded that the main barrier is price, 84% of studies confirmed this. The studies by Yadav and Pathak (2016) and Massey et al. (2018) also identify the price of organic products as a barrier, when compared to the prices of conventional products. Despite for some consumers, the fact that organic products are considered expensive, leads them to increase their purchase intention, perhaps because organic can be seen as a symbol of status, luxury and trend. Basha and Lal (2019) report that due to the luxury effect, consumers are willing to pay up to 20% more than a regular product (Wandel &Bugg, 1997).

2.6. Grocery Retail Industry and Covid

Finally, a contribution on the retail sector regarding the effects of Covid.

It is a fact that the pandemic scenario brought significant changes at the behavioural level (Blake et al., 2020). The virus forced billions of people to stay at home in quarantine and most countries around the world adopted restrictive measures. Having completely changed the way individuals relate and interact with each other, the virus has triggered several risks and challenges for the world's economic and social development.

In addition, it is estimated that the disease has a significant impact on the way individuals live, work and shop, thus affecting most businesses (Hoekstra & Leeflang, 2020). Effectively, the fear associated with the contamination and spread of the virus has caused a large proportion of consumers to change their purchasing behaviours and adopt alternative methods. Simultaneously, consumers began to prioritise their spending and reconsider certain products and brands.

As COVID19 is a relatively recent disease, there are still no significant literature resources on the impact of the pandemic on changes in consumer behaviour in Portugal. Therefore, it is relevant to investigate and assess the impact of the COVID19 pandemic on changing consumer behaviour and their relationship with brands. This requires an analysis of consumer attitudes towards brands in a pre- and post-pandemic scenario.

The pandemic will also impact the behaviour, expectations and business practices of retail companies, consumers, and employees not only in the short term, but also in the long term.

Wang, Y., Xu, R., Schwartz, M., Ghosh, D. & Chen, X. (2020) have analysed the grocery buying behaviour during the pandemic and compared the pre and post Covid-19 buying behaviour of 2500 American consumers and identified a potential long-term transition to online grocery shopping, there are two ways to purchase food products online: delivery to doorsteps and curbside pickup and the study found that about half of respondents did not use either type of delivery during the pandemic (due to service availability and coverage). And from the respondents who use online grocery shopping services: 1280 (52.70%) use delivery-to-doorstep, and 1118 (46.03%) reported using curbside pickup services. Furthermore, they concluded that consumers do not make their purchases on a single platform; they tend to change between platforms. There are three possible categories: national grocery shopping platform (Amazon Fresh (24%) and Instacart (7.55%)), grocery store online platforms (Walmart (16.43%), Costco (6.64%), and Target (6.35%)), regional grocery shopping platform.

2.7. Sauces contextualization

It is important to understand how the sauces ketchup and mayonnaise are divided.

Thus, regarding ketchup it is divided by the following subcategories: normal, light, and spicy in two types of packages: top down and squeezable, which can have small, normal, and big sizes. The main brands of ketchup are Heinz, Calvé, Hellmann´s, Paladin, and retailer´s brand.

Considering mayonnaise category there are the following types: normal, light, truffle, with caramelised onions and garlic, vegan, with olive oil, of the sea, with salt flower and garlic. There are both plastic and glass packages, whose size may be small, normal, or large. The main brands of mayonnaise are Calvé, Heinz, Hellmann´s, Paladin, Vianeza, and the retailer´s brand.

3. METHODOLOGY

3.1. Research questions

The aim of this study is to understand, with the Portuguese families, the changes during and after confinement.

To this end, we defined the following research questions:

RQ1: What are the changes in living and purchasing habits during the pandemic that still remain?

RQ2: What are the changes in purchasing habits, during the pandemic, specifically in the sauces category that still remain?

RQ3: What are the changes in consumption habits, during the pandemic, specifically in the sauces category, that still remain?

3.2. Research methods

The study followed a qualitative methodology, based on the ethnographic method; the study was conducted on the basis of two methods:

- In Situ: holding dinners at chosen families homes
- Shadowing: observe the buying behaviour of an individual

3.2.1. In Situ Methodology

"Insitu therefore refers to information from customers/ users that originate from a real-life, value co-creation situation; the information is thus created and documented in the use situation as or just after it occurs." ((Edvardsson, B. Kristensson, P., Magnusson, P., & Sundström, E., 2012).

It is a qualitative nature methodology of anthropological character that aims to understand the consumers attitudes and behaviours through observation and non-direct interview in the most honest way, because consumers are in their environment and comfort zone.

Sample

This Project has a sample of 52 Portuguese families from the lower middle, middle and upper middle; who buy in different brands, from various regions of the country; with different family profiles (children, single parents, and elderly people and who must have at least 2 elements). Therefore, in choosing the families, the criteria were location, family structure, social class, and supermarket insignia, with the aim of having a diversified sample.

This sample was obtained with the collaboration of 6 students who are carrying out their master's thesis. I interviewed nine of the 52 families (about 8 hours per family over 2 dinners). Although each student has his or her thesis theme, at dinners all themes were addressed in order to allow for the sample size.

Procedure

In each family two dinners were made in order to be sure all the information needed was collected. Both dinners were recorded with the permission of the families and later transcribed by the students. Each of the 52 families received a voucher of 75 euros in a supermarket of their choice.

Therefore, at the first dinner, the students had to do the "interview" in a fluid and relaxed way, based on a previously written script (Annex A – In Situ script). After the first dinner, the respective transcripts were made. Once the transcripts were made and evaluated, the second dinner was scheduled with the same family. The aim of this second dinner was to complete the interview and gain the trust of the participants, in order to be more spontaneous and open. Finally, the students performed the transcription of the second dinner with the aim of completing all the information.

This script covered the following topics:

- General purchasing habits;
- Savoury sauces: broths, ketchup, mayonnaise, mustard and other sauces;
- Other categories that were studied by the other 5 students;
- Feneral media consumption habits.

At the beginning of the dinners, questions were always asked about the family structure; professional life; the impact of Covid on the family; which supermarket brands they usually buy; what image they had of them; if they care about sustainability., among others.

The model of Solomon, M.R., Bamossy, G.J., Askegaard, S., and Hogg, M.K. (2016) was used to develop the script. This model identifies the problems adjacent to each stage of the consumption process: prepurchase issues, purchase issues, post purchase issues. Thus, the script was also thought in 3 phases: shopping behaviour, consumption behaviour and post-consumption behaviour.

Therefore, at first, questions were asked such as what image they have regarding different brands; how often they make the purchase; which brand they usually choose; what factors influence the choice during the purchase; what drives them to buy again.

Then, questions were asked about consumption, such as what are the moments of consumption; who consumes at home; whether Covid changed consumer habits; what are the stock levels at home, among others.

Finally, regarding the third stage, they were asked what experiences they have had when buying the product and if they usually share them with friends or even friends share with them.

3.2.2. Shadowing Methodology

This method is a qualitative research technique, where the researcher behaves like an observer. The researcher observes real situations of a certain participant for a certain time. During this time, the researcher does not interfere so as not to influence the participant's behaviour.

Sample

This Project has a sample of 54 Portuguese people from the lower middle, middle and upper middle; who buy in different brands, from various regions of the country; with different family profiles (children, single parents and elderly people and who must have at least 2 elements). Therefore, in choosing the families, the criteria were location, family structure, social class and supermarket insignia, with the aim of having a diversified sample.

Procedure

This method was also done with the collaboration of 6 students, and the topics that were addressed were broths and sauces. Each student observed the behaviour of 9 people in the supermarket, taking into account how the person shops these types of products. If she or he looks at posters before the purchase, at the product labels, if touches in the products, compares prices, brands, in other words, what makes them buy a particular product.

Participants were asked to make the purchase aloud, which means, to verbalize their behaviour and the reasoning that leads them to buy a certain product, in order to record the trip to the supermarket and, consequently, to be transcribed. Each of the 54 participants received a voucher of 30 euros to make the asked purchase.

At the end they were asked to answer a questionnaire (Annex B – shadowing script) about the purchase of sauces and broths. The questionnaire focused on the following dimensions: how many times did you buy broths/sauces in the last year?; what variety?; What makes you buy again?; what kind of promotions do you usually enjoy?; what did you think of the offer in this supermarket?; What is your favourite brand?; in which dishes do you use?; among others.

4. DATA ANALYSIS AND CONCLUSIONS

4.1. Changes in living and purchasing habits

4.1.1. Who usually goes shopping

“We observe that purchases of FMCG are most often made by the couple or even the older children, and this phenomenon has been accelerated by the pandemic” (figure 4). Therefore, brands should not focus the intended communication message too much on the housewife.

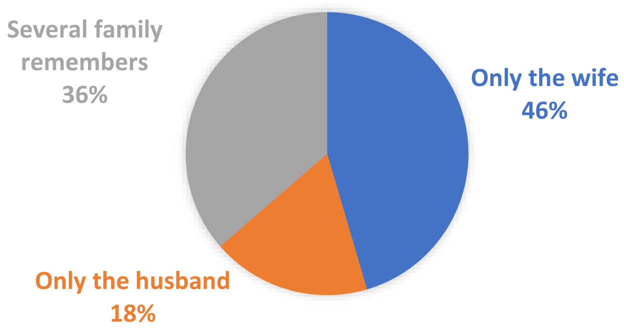


Figure 4 Who usually goes shopping

It was found in a significant number of families (46%) that several members play the role of going shopping, varying according to the moment and the situation. "For big shopping we go together. Only when one or other thing is missing, only one of us goes" (Woman, 26 years old, analyst, Covilhã).

There are few families in which it is only the husband who goes shopping. Except in participating single-parent families. "Usually, my husband takes care of it. He knows everything that is consumed here at home" (Woman, 55 years old, teacher, Algés).

The most frequent situation among the participant families is the wife doing the shopping in physical shops. "I'm usually the one who takes care of the shopping. My husband only goes in case of need" (Woman, 22 years old, shop assistant, Camarate).

It was found that during the confinement it became common for shopping to be done by only one of the family members.

4.1.2. Place and frequency of purchase

Type of place

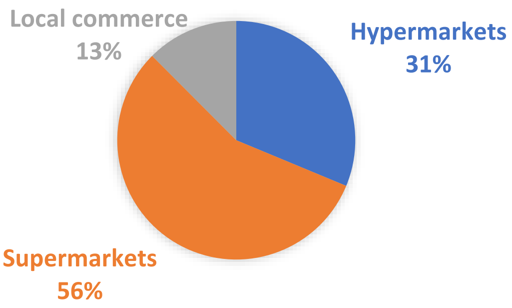


Figure 5 Type of place

Supermarkets are the places where most of the interviewed go to do their shopping. "We make a major purchase, fortnightly or monthly at Pingo Doce. For the rest we use the local shops" (Woman, 46 years old, engineer, Lisboa).

Even so, a significant number of families (31%) resort to hypermarkets, especially those living in large urban centres. "We have a supermarket under our house, but for large purchases we prefer a hypermarket" (Man, 31 years old, manager, Porto).

Those who use local commerce do so as a complement to the bigger supermarkets, in order to buy fresh products or in situations where they need a certain product. "We really like to buy from farmers or going to the backyard to pick fruit, but every day we go to the supermarket" (Woman, 66 years old, chef, Faro).

Insignia

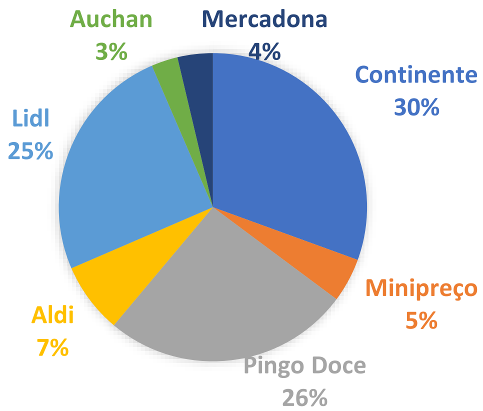


Figure 6 Insignia

Regarding the supermarket and hypermarket insignias most used by the participating families, the most common is Continente, followed by Pingo Doce and then Lidl.

It was also possible to see from the participating households that they often use more than one of the chains, taking into account the type of purchases they intend to make.

Frequency

	Hypermarket	Supermarket	Local shops
1 or 2 times a month	"I go to the Continent every 15 days, just for the 'big' shopping" (Woman, 49 years old, commercial manager, Matosinhos).	"We do click and collect at Auchan every 3 weeks" (Woman, 41 years old, media analyst, Alfragide).	No cases were observed in which purchases in local businesses occurred at such long-time intervals.
Weekly	"I go to Continente or Mercadona once a week" (Woman, 46 years old, lawyer, Porto).	"Now we make a list to only go shopping once a week" (Woman, 47 years old, teacher, Covilhã).	"We go to the butcher and grocery stores maybe once a week for the fresh products" (Man, 72 years old, retired, Oeiras).
2 or more times a week	There were no recorded cases of visits to hypermarkets more than twice a week.	"We go 3 or 4 times a week, easy. We're consumerists!" (Woman, 44 years old, commercial manager, Porto).	"I do my shopping for fruit and vegetables at a grocery store here" (Woman, 55 years old, cleaning lady, Camarate).

Table 1 Frequency

4.1.3. Deciding on the place of purchase

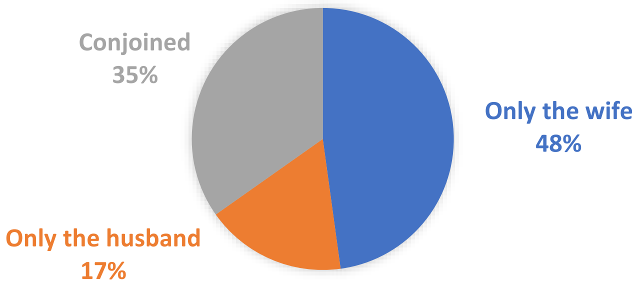


Figure 7 Deciding on the place of purchase

In many households, the decision of where to buy is joint, involving both partners. "We both prefer the Continente, but we go to Pingo Doce because it is more convenient" (Woman, 41 years old, university teacher, Matosinhos).

With the exception of single-parent households, it is not very common for men to decide the place of shopping. "As I'm always the one who shopping, it's up to me to decide the place" (Man, 62 years old, managing partner, Fátima).

The most frequent situation among the participants is that it is the woman who chooses the purchasing place. "I usually decide, but it's always a matter of distance and convenience" (Woman, 24 years old, university student, Lisboa).

It is interesting to note that in relation to those who refer that the decision is joint, it is common to verify that the woman's opinion has more weight.

And even in situations where it is the man who decides the place, it is often the woman who decides what is necessary or convenient to buy.

4.1.4. Average time spent in each shop

We also asked the interviewees how long they usually take, on average, in each shop. The most frequent response is that it takes them between 15 and 45 to do their shopping, as we can verify below.

Up to 15 minutes		A significant part of the participants mention that they spend little time in each shop when they go shopping	"As we don't cook at home and only buy the basics, it's quick" (Woman, 59 years old, manager, Fátima).
15 to 45 minutes		The most common is for them to take between 15 and 45 minutes	"I don't take too long because I know where things are" (Woman, 55 years old, teacher, Algé).
45 to 90 minutes		A quarter of respondents take more time in each shop as they go shopping less frequently.	"It takes me about an hour, only when I go to the butcher's is more..." (Woman, 55 years old, cleaning lady, Camarate).
2 hours or more		Only one family reveals that it takes more than two hours, since they shop only a few times a month at the hypermarket.	"As I only go once or twice a month, at Continente it takes me around 3 hours" (Woman, 55 years old, university teacher, Lisboa).

Table 2 Average time spent in each shop

4.1.5. Shopping list for sauces and broths

Although there is always a tendency to make an impulse purchase, we find that most consumers make a shopping list, i.e., at the time of making a shopping list it is important to remind them of the importance of a particular product.

Make list		Most of the interviewees mention that they always carry a shopping list and include sauces and broths in it.	"We always make a list because that way we spend less" (Man, 45 years old, financial director, Porto).
Does not make a list		Only a small proportion of participants say they never make a shopping list.	"I never take a list because what's missing at home are small things. I just go there, buy them and leave" (Man, 24 years old, trainee, Lisboa).
Sometimes does		We also have some participants who do the list only occasionally, and these are the ones who least respect the list.	"Sometimes I make a list, but it's more when I'm going to buy a lot of things" (Woman, 66 years old, chef, Faro).

Table 3 Shopping list for sauces and broths

4.1.6. Positive image of the insignias

We also asked the interviewees to reflect on the image they have of each of the insignias, whether they are customers or not.

		Customers		Non-customers
CONTINENTE		The majority of respondents who are Continente customers have a positive image of the insignia.		Very few participants who are not Continente customers have a positive image of the insignia.
pingo doce		In general, Pingo Doce customers have a positive image of the brand, with only a few customers criticising it.		Even with regard to non-customers, a small group has a positive image of the insignia.
Auchan		There are few participating households that are Auchan customers, but all have a positive image of the chain.		Within the group of those who are not customers, most have a positive image of Auchan.
LIDL		All participants who are Lidl customers have a positive image of the brand.		And even within those who are not customers, most have a positive image of the insignia.
ALDI		Few of the respondents are Aldi customers, but of those who are, the majority have a positive image.		This insignia is little talked about by non-customers, but the image they have is positive.
MERCADONA		There are few participating families that are Mercadona customers, but all have a positive image of the chain.		This insignia is little talked about by non-customers, but all have a positive image about it.

Table 4 Insignias image

We observed that most participants have a positive image of the insignia they are customers of, but sceptical about the rest. Therefore, it is necessary to work to maintain customer loyalty, although interest in Lidl and Mercadona is growing, the latter due to the novelty factor.

Among all the chains, Continente is the most mentioned, with customers having a positive image of the chain, but not so positive within the group of non-customers. This also happens with Pingo Doce.

Of all the supermarket and hypermarket brands, the one with the best image among both consumers and non-consumers is Lidl.

4.1.7. Changes in purchasing habits during confinement

Regarding the changes in purchasing habits resulting from the confinement and answering the research question 1, we verify that about half of the respondents started to do their purchasing online, and this increase due to three main reasons: comfort, convenience, and ease. But the other half has not changed their purchasing habits, either the way or place to buy.

More online shopping	About half of the households switched to online shopping for consumer goods during confinement.	"We have started to buy online practically everything, which we did not did before" (Woman, 38 years old, marketeer, Algés).
No changes	Half of the participants did not change either the way or the place of shopping for consumer goods.	"We didn't change anything, except that I went shopping on my own, but I went to the same places" (Woman, 72 years old, retired, Oeiras)

Table 5 Changes in purchasing habits during confinement

We can also highlight the decrease in the frequency of shopping, due to families wanting to minimise exposure to risk and illness.

Higher frequency	The number of families that went shopping more frequently was not significant.	"We didn't shop that much, but we went more often because we always ate at home" (Man, 50 years old, engineer, Lisboa)
Lower frequency	Most of the interviewees report that they went shopping less often during the confinement.	"The only change was to go to the supermarket less often, to avoid the dangers" (Woman, 43 years old, teacher, Covilhã)

Table 6 Changes in purchasing frequency

4.1.8. Changes that continued after confinement

It is important to mention that of these two aspects, once the confinement was overcome, respondents maintained their level of frequency of purchase: the pandemic reduced the frequency of purchase and this behaviour continued after the confinement was overcome. But online purchases suffered a minimal reduction after the lockdown.

Lower frequency of purchases	The change that participants most reported that they continued to make after confinement was that they continued to go shopping less	"We still go to the supermarket less often, but we have buying more things" (Man, 49 years old, commercial director, Fátima)
New point of purchase	A small proportion of respondents continued to go to the same type of shops as they did in confinement.	"At least for now, we continue to go to the supermarkets nearer to home" (Woman, 48 years old, teacher, Covilhã)
Online shopping	Some families maintained the habit of purchasing online after confinement.	"We have maintained online shopping, particularly large purchases" (Woman, 37 years old, finance director, Corroios)
Larger quantity of purchases	Some families say they continue to buy more quantities than before as they continue to eat at home.	"The pandemic has only changed the amount of things we buy, because we ate more at home" (Man, 46 years old, managing partner, Fátima)

Table 7 Changes that continued after confinement

4.1.9. Purchases of physical goods that currently do through e-commerce

Table 8 Product categories purchased online

Participants who currently shop online are less than half.

The categories that are most purchased online are technology and clothing and footwear.

And only a small number of respondents buy food products and cosmetics and perfumes online.

4.1.10. Online shopping habits of culinary sauces and broths

It was possible to verify a small increased on the number of families who started buying this type of products online and this is due to the general increased of online shopping during the lockdown. After the confinement there was a slightly reduction in the number of households making online purchased of food products.

BEFORE CONFINEMENT		Before the pandemic, only a very small number of participants shopped culinary sauces and broths online.	"When we bought online we already bought the sauces and broths we needed" (Man, 39 years old, teacher, Sines).
DURING CONFINEMENT		During the confinement, the number of respondents buying food products online increased.	"During the lockdown we bought all kinds of products online" (Woman, 41 year old, university teacher, Matosinhos).
After CONFINEMENT		After the confinement there was a slight reduction in the number of households making online purchases of food products.	"We shopped online for all products, including food products, but we we've stopped doing that now" (Woman, 45 years old, lawyer, Leça do Balio).

Table 9 Online shopping habits of culinary sauces and broths

4.1.11. Who in the family shops online

BOTH OR ALL		"Here at home we all do online purchase. It depends on the situation" (Woman, 56 years old, teacher, Grândola).
WIFE		"She is the one who is most up to date about these things, the cards and those things..." (Man, 43 years old, welder, Alcácer do Sal).
HUSBAND		"I do it myself, but she helps see what needs to be buy" (Man, 42 years old, driver, Algés).

Table 10 Who in the family shops online

WEEKLY BASIS		**MONTHLY BASIS**		**SPORADIC FREQUENCY**	

Table 11 Online purchased frequency

Most commonly, online shopping is done by both partners and, when they have older children, by all family members.

In situations where men are the ones buying online, women most often participate in making the shopping list.

Online purchases are mostly made monthly, which is encouraged by delivery charges.

4.1.12. Perceived benefits of e-commerce

The increase in online shopping was due to three main reasons: comfort, convenience, and ease. But the time saving and avoiding travel were also mentioned as benefits of e-commerce from some respondents.

COMFORT	The three benefits of online shopping most commonly said by a greater number of households were comfort, convenience or ease.	"They put my groceries at my door and I can pay on the computer!" (Woman, 56 years old, teacher, Grândola).
TIME SAVING	A significant number of respondents mentioned time saving as a benefit.	"You can do your shopping at any time, which saves time" (Woman, 46 years old, logistics technology, Leça do Balio).
AVOIDING TRAVEL	The fact that they do not have to leave home, nor spend money on fuel and tolls was also considered a benefit by several families.	"We don't have to make travel expenses" (Man, 38 years old, commercial manager, Algés).

Table 12 Benefits of e-commerce

Even families who don´t have the habit of shopping online pointed out some of these advantages.

Other advantages were also mentioned, such as saving money, access to promotions, avoiding impulse purchases and a greater variety of products.

4.1.13. Perceived barriers regarding e-commerce

Some barriers to online commerce have also been identified.

INABILITY TO TOUCH THE PRODUCTS	The barrier to online shopping identified most often by a larger number of households is undoubtedly the fact that they cannot touch the products.	"I like to see the fruit before I buy, and if I have to go there to buy the fruit I might as well buy everything!" (Woman, 53 years old, teacher, Amadora).
ORDER FULFILLMENT	A small number of respondents believe that e-commerce does not allow them to track order fulfilment as they would like.	"My main barrier is not knowing if there hasn't been a product and how they solve it!" (Woman, 43 years old, teacher, Covilhã).
WEBSITE MALFUNCTION	There is also a small number of respondents who fear that a malfunctioning website or service will harm the online purchase.	"Sometimes the website says it doesn't have certain products that I know that the shop has" (Man, 24 years old, market analyst, Lisboa).

Table 13 Barriers of e-commerce

The main barrier in e-commerce has to do with their inability to touch and see the products. However, packaged and repeat purchase products do not fall into this group, so the emergence of a purchase dichotomy is expected:

- Growth in online shopping for packaged and regularly bought products;
- Purchase of fresh or new products to remain in physical purchases.

More than half of the participants believe that there are still barriers to the popularization of e-commerce.

Only one interviewee reveals that he does not adopt e-commerce due to his lack of knowledge.

A small proportion of the interviewed respondents say they do not trust the payment methods.

4.2. Sauces purchasing and consumption behaviours: Ketchup and Mayonnaise

4.2.1. Ketchup

4.2.1.1. Ketchup purchase

Brand image

Regarding the specific analysis of ketchup, is important to analyse the image customers have from each brand. Although the interviewees assume that they have a positive image of the retailers' brands, they consider that the products of these brands do not have the same quality as the other brands. Thus, we can highlight the brand importance.

	Calvé brand ketchup is the second one that families mentioned as having a positive image, with no one presenting a negative image of it.	"In terms of price-quality it's the best and it's one of those brands that make you want to to try" (Woman, 41 years old, teacher, Maia). "It has an image of fresh tomato tomato, it conveys confidence" (Man, 42 years old, driver, Algés).´
	Regarding ketchup, most families have a positive image of Heinz and it is the most talked about, but many find it expensive.	"Heinz has that image of tradition. It's very much associated with ketchup" (Man, 46 years old, market analyst, Alfragide).
	Among the participants, there are few who have a positive image of Paladin Ketchup. Among all the products, it has the highest number of negative comments.	I tried Paladin because it ia a Portuguese brand, but didn't convince me (Woman, 49 years old, assistant at a school, Grândola).
	Several interviewees talk abour the retailer brands, however, despite pointing out the fact that it has a good price, many believe that it does not have the same quality as other brands.	

Table 14 Brand image

Brands appreciated regardless of price

The Heinz and Calvé brands appear as the brands with the most positive image, making price a non-determinant purchase criterion.

Heinz	If the price factor is not one of the criteria when buying ketchup, most participants choose the Heinz brand.	"I would prefer Heinz, because it gives me confidence and quality" (Man, 37 years old, consultant, Corroios).
Calvé	A considerable number of families would choose Calvé if price did not matter.	"Calvé is always our favourite, but we don't always buy it because it's a bit more expensive" (Woman, 38 years old, analyst, Sines).

Table 15 Brand appreciated regardless of price

In addition to the above two brands, some interviewees mention Paladin and Hellman's.

A small number of families claim not to feel any difference between the various brands of ketchup, i.e., they are indifferent to them.

What leads to purchase

The purchase of ketchup tends to be a purchase that arises from the recognition of a need, since most interviewees stated that they buy this product when the stock is running low. Only a few families stated to buy it when they see promotions or by impulse.

STOCK TO FINISH	Virtually all respondents say they buy ketchup when the stock is running low.	"We like to always have ketchup at home, so when we're running low we go buy it" (Woman, 48 years old, insurance employee, Faro).
PROMOTIONS	Only a small number of participants say they buy ketchup when there are good promotions.	"We consume a lot, so that when we see a good promotion, we buy several packages" (Woman, 52 years old, university teacher, Estoril).
IMPULSE	A small number believe that buying ketchup is impulsive and done without reason.	"If we see a new brand, we may feel the impulse to try it out..." (Woman, 37 years old, finance director, Corrois).

Table 16 What leads to purchase

Purchase frequency

REGULAR	ONCE A MONTH	A considerable number of families say they buy ketchup once a month.	"Every month I buy it because it's something I always like to have at home" (Woman, 53 years old, school employee, Serpa).
	ONCE PER QUARTER	A significant number of respondents say they buy more or less every 3 months.	"We buy few times, maybe every 3 months, because it's not very healthy..." (Woman, 38 years old, analyst, Sines).
SPORADIC	FEW CONSUME	Those who buy sporadically do so because they consume little ketchup.	"It's very rare that we use sauces, so we don't buy many often" (Man, 44 years old, consultant, Matosinhos).
	DOES LARGE STOCKS	Only a small proportion buys rarely, because they make large stocks at home.	"Whenever I see a good promotion I buy a lot and stock up at home" (Woman, 52 years old, university teacher, Estoril).

Table 17 Purchase frequency

Choices at the time of purchase

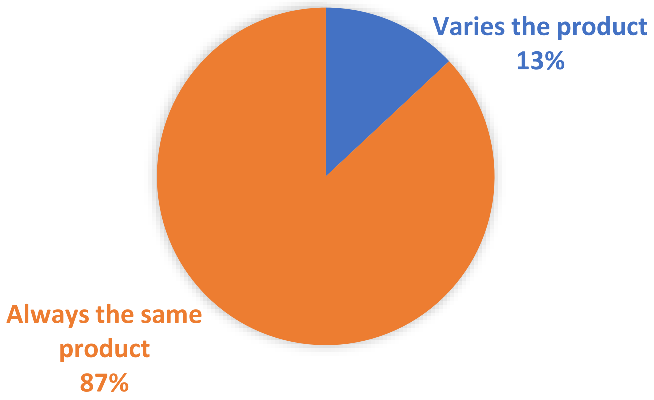


Figure 8 Product choice

Regarding ketchup, most families say they always buy the same product, or at most they choose between two. "I always buy the same brand (Heinz), but if there is I prefer the one with less salt" (Woman, 44 years old, commercial manager, Porto).

Only a small number of respondents vary the brand and type of ketchup they buy, they decide at the time of purchase. "I buy ketchup from a brand (not retailer´s ketchup), but the one that is promotion and is cheaper" (Woman, 45 years old, logistics employee, Leça do Balio).

Most of the participants say they are loyal to the brands, but they can vary the type of product they buy within the same brand.

Regarding the proportion that is not loyal to brands, most use it for cooking and therefore choose to buy the cheapest.

Those who normally vary between two products, buy mostly the main brands, and the decision is based very much on price.

Among the small number of participants who vary by brand and type of product, several claim not to opt for retailer brands because "it's not the same".

Regarding the type of ketchup chosen, most of the participating families prefer the "normal", traditional ketchup. Only one family indicated a preference for ketchup with less salt. In addition, none showed an interest in buying ketchup with a spicy or reduced sugar content. We can conclude that there may be some lack of knowledge about the various options offered.

Type of packaging chosen

Regarding the size of the package chosen, this varies according to the family's consumption, as there is concern about the ketchup's shelf life.

Several respondents say that the size of the package chosen depends on the promotions offered at the time of purchase.

SMALL (250 GR)	About half of the participants prefer to buy small packages, as they do not use often and have a shelf life.	"I usually buy the small packs. I only buy the medium ones if they are on sale" (Woman, 27 years old, working-student, Covilhã).
MEDIUM (500 GR)	A significant number of respondents buy the medium pack, the main reason is the household consumption.	"We buy the medium ones because they have the right quantity: they last a while and and don't go out of date" (Woman, 51 years old, hairdresser's owner, Fátima).
BIG (700 GR)	A small number of families choose to buy the large pack because in that way they buy less frequently.	"We buy the big ones because they are cheaper and they'll be consumed" (Woman, 53 years old, school employee, Serpa).

Table 18 Type of packaging chosen

Type of promotions used

Regarding sensitivity to sales promotions, it was found that families prefer promotions whose mechanism is to give more, immediate and certain benefit, specifically the direct price reduction technique.

DIRECT PRICE DISCOUNT	More than half of the interviewed families prefer direct price discounts and pay attention to these promotions.	"When it comes to buying ketchup, what I'm most interested in is discounts on the price" (Woman, 43 years old, teacher, Covilhã).
COUPONS	A small number of respondents use discount coupons and/or card discounts when buying ketchup.	"We usually take advantage of discounts on price, Continente coupons or the 15% discount card" (Woman, 43 years old, teacher, Covilhã).
PRODUCT PACKS	A small number of participants claim to be interested in the product packs.	"If there is a brand activation or a new product that they offer packs, I try to take advantage of it" (Man, 37 years old, consultant, Corroios).

Table 19 Sales promotions used

Changes in purchasing habits during lockdown

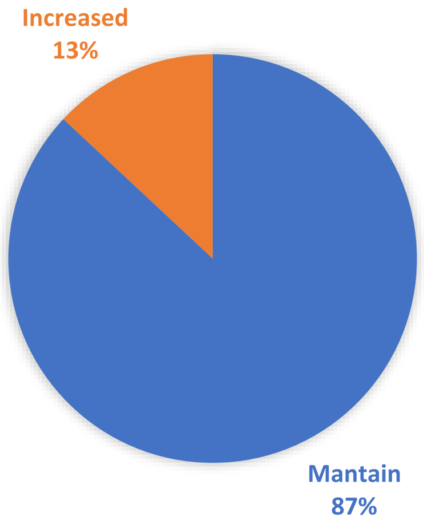


Figure 9 Changes in purchasing habits

Most families have not changed their ketchup purchasing habits during confinement. "There were no changes and we have continued to buy the same quantities of ketchup" (Man, 50 years old, truck driver, Leiria).

Only a small proportion say they have increased their ketchup consumption during lockdown. "Since we ate more at home maybe we spent a little bit more, but the difference wasn't that big" (Woman, 45 years old, vending technique, Fátima).

Regarding research question 2, we can say that the confinement did not have a great impact on the families regarding the habits related to this category of product. There was only a slight increase in the quantities purchased due to the increased in the number of meals at home.

Regarding the place of purchase, most of the participating families say that they did not change the place where they used to buy ketchup with the confinement, with a few exceptions: there is some preference for proximity shops over supermarkets or hypermarkets and a slight increase in the preference for online shopping during some times of the pandemic.

Post-confinement purchasing habits

- **Purchased quantities:** most stated that there was no change in the amount of ketchup purchased after confinement, i.e., there was a small increase. Compared to the pre-lockdown period, only one family says that the amount has decreased, but has returned to the levels before the pandemic, due to a reduction in the number of meals prepared at home.

- **Purchase place:** most participants say they continue to buy ketchup from the same places they bought it at confinement period, there is only a small decrease in online purchase.

4.2.1.2. Ketchup consumption

Ways of consumption

In total, 25 of the 52 families interviewed consume ketchup regularly.

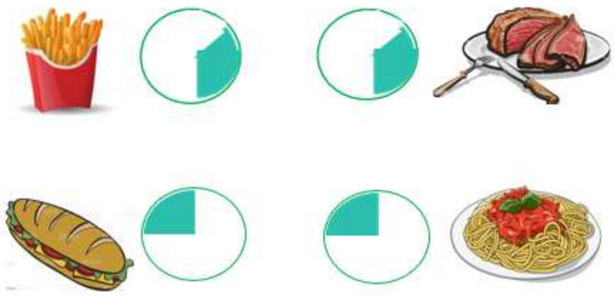


Figure 10 Ways of consumption

A significant number of households use ketchup on their chips. "We usually put it on the chips, sometimes mixed with mayonnaise" (Woman, 42 years old, teacher, Covilhã).

A quarter of respondents use ketchup on the sandwiches. "Every time we make sandwiches we use ketchup" (Woman, 66 years old, chef, Faro).

The dishes most mentioned by the participants in relation to the use of ketchup are meat dishes, such as hamburgers and sausages. "I use it a lot for making grilled meats, roasts,hot dogs and hamburgers".

Several participants also use ketchup in pasta, especially lasagne. "I love pasta with ketchup. Only I don't use more because it's fattening..." (Woman, 41 years old, university teacher, Matosinhos).

Different ways of using ketchup were observed by the interviewees. Although not many do it, some use it on tomato rice, tuna, and pizzas.

Reasons for non-consumption

Not consuming ketchup is more associated with personal taste than health concerns.

TASTE	Personal taste is the most mentioned reason for not consuming ketchup.	"We don't consume because we don't like it. At home nobody likes it" (Man, 48 years old, tour guide, Tavira).
HEALTH	Only a small number of respondents stated that they do not consume for health reasons.	"We don't use it because it's one one of those things that we think it's not healthy" (Woman, 52 years old, university teacher, Lisboa).
LACK OF HABITY	There were few who said they did not consume because they did not have the habit or did not feel the need to do so.	"I don't usually buy it because we never use it. There's no such habit" (Woman, 49 years old, commercial manager, Matosinhos).

Table 20 Reasons for non-consumption

Who consumes in the family

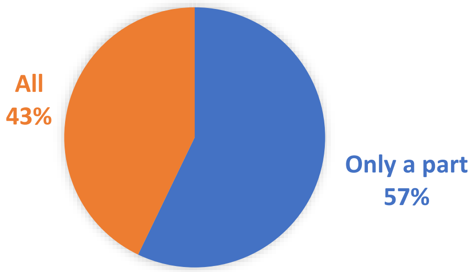


Figure 11 Who consumes

In a large number of families, all the members consume ketchup. "We all put ketchup on our Chips, sometimes mixed with mayonnaise" (Woman, 43 years old, teacher, Covilhã).

But mostly only part of the family consumes ketchup. "I, for example, don't use it. If I did, I'd end up fat! " (Woman, 30 years old, working-student, Porto).

Ketchup consumption before lockdown

1 OR 2 PACKAGES PER YEAR	Half of the households claim not to consume more than 1 or 2 packets of ketchup per year.	"We don't use a lot of ketchup. A medium-sized container is able to last us a year here at home" (Woman, 38 years old, marketeer, Algés).
AT LEAST ONE PACKAGE PER QUARTER	A varied number of families say that a medium or large package lasts up to about 3 months in their home.	"We spend roughly an average pack every three months. If we buy a small one it lasts less, of course" (Woman, 43 years old, teacher, Covilhã).
ABOUT 1 PACKAGE PER MONTH	The big ketchup consumers who claim to consume one package of ketchup a month are very few.	"Before the confinement, a large package would give us for about 2 to 3 weeks" (Woman, 45 years old, lawyer, Leça do Balio).

Table 21 Ketchup consumption before lockdown

Change in consumption habits with confinement

Regarding research question 3, we can say that when we talk about ketchup consumption and its changes with confinement, most of the interviewed families maintained the same habits.

SAME QUANTITY	Most of the interviewed households maintained the amount of ketchup consumption with the confinement.	"Ketchup is not something we use all the time, so that the fact that we are in confinement didn't make us consume more2 (Woman, 45 years old, lawyer, Leça do Balio).
INCREASED THE QUANTITY	A quarter of respondents increased their ketchup consumption as they had more meals at home, and made dishes such as sandwiches and burgers more often.	"We consume more, because we eat more crap like hamburgers, hot dogs..." (Woman, 45 years old, lawyer, Leça do Balio).
DECREASED THE QUANTITY	Only a few participants claimed to decrease their ketchup consumption during confinement.	"We consumed less because we tried to make healthier meals" (Man, 46 years old, market analyst, Alfragide).

Table 22 Changes in consumption habits with confinement

Expectable habits after return to "normal"

Most respondents believe that ketchup consumption habits during confinement will be maintained when everything is fully back to "normal". This is justified by the fact that they have new eating habits such as sandwiches, hamburgers, among others, which encourage the use of ketchup and will be difficult to stop. Even so, there are some cases of people who may reduce their consumption, once they start having lunch out of home.

Stock levels

1 PACKAGE	Most families usually have a medium or large ketchup container at home in addition to the one they are using.	"We usually always have a big package, because we don't like to run out ketchup" (Woman, 53 years old, school employee, Serpa).
MORE THAN 1 PACKAGE	Only a small number of respondents claim to have more than one packet of ketchup at home, with those that do, many having one brand for normal consumption and another retailer's brand for cooking.	"We have a large pack of Calvé or Heinz, depending on which one is on promotion and one from Pingo Doce for cooking" (Woman, 45 years old, lawyer, Leça do Balio).
DON'T HAVE STOCK	A considerable number of families do not stock ketchup, due to lack of space and the fact that their consumption does not justify it.	"Here at home we don't stock almost anything because we have no space" (Man, 24 years old, market analyst, Lisboa).

Table 23 Stock levels

Awareness of communication messages

In terms of the impact of the brands' communications we observed that most of the interviewed families do not recall any kind of communication from ketchup brands. Even so, the brand with the highest recall was Heinz.

	Only a small number of families could recall any kind of communication of Calvé ketchup.	"I only remember one from Calvé that was on television, with the people sitting at the table passing the ketchup" (Woman, 53 years old, school employee, Serpa).
	Some interviewees remember communication messages from Heinz brand.	"From Heinz it sometimes appears advertising on Facebook, but it's very rare" (Woman, 24 years old, university teacher, Lisboa).
	Only a small proportion recall communication messages from the Paladin brand.	"I see some communication from Paladin on social media, but maybe it's because I follow them..." (Woman, 37 years old, finance director, Corroios).

Table 24 Awareness of communication messages

4.2.1.3. Post-use behaviour of ketchup

Knowledge and sharing of experiences

None of the participants can recall ever having a conversation about ketchup, either in person or from digital media. In addition, they also do not recall having shared an experience of buying and/or consuming ketchup with anyone.

> "Ketchup is not usually a topic of conversation, so I don't recall any experiences shared by others. It's also unusual to see comments about this type of product" (Man, 37 years old, consultant, Corroios).

> "For us, ketchup is not a topic of conversation, and we don't waste time talking about it" (Woman, 41 years old, university teacher, Matosinhos).

4.2.1.4. Shadowing: ketchup purchase

Reasons for buying again

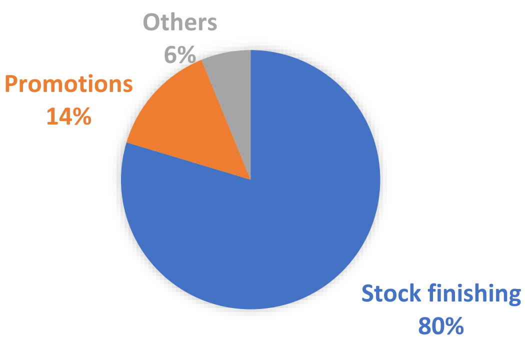


Figure 12 Reasons for buying again

"It's an impulse purchase, which I only make when I feel the need" (Woman, 49 years old, teacher, Álcacer do Sal, family of 4 people).

"I only buy when family come to visit us" (Woman, 60 years old, retired, Grândola, family of 2 people).

The participants that we verified that are looking for promotions are people between 25 and 50 years old, whose household is made up of an average of four people, of which two are minors, and belong to the middle and lower-middle classes.

Most people decide to buy ketchup when it is running out, and the existence of promotions is not important.

Behaviour in the event of product rupture

In the event of a rupture of the ketchup they normally buy, most consumers choose to change brand, in which case they look for the cheapest, and the retailer's brand is included in that choice.

Those who choose to postpone the purchase are mostly from the middle and upper-middle classes, aged between 30 and 45, whose family has four members with one or two minor children.

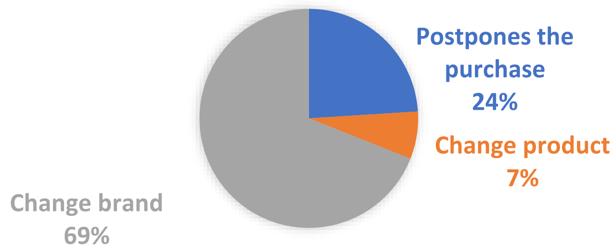


Figure 13 Behaviour in the event of purchase

Those most willing to change products are between 20 and 40 years old and most do not have minor children.

Observation - Persona’s identification

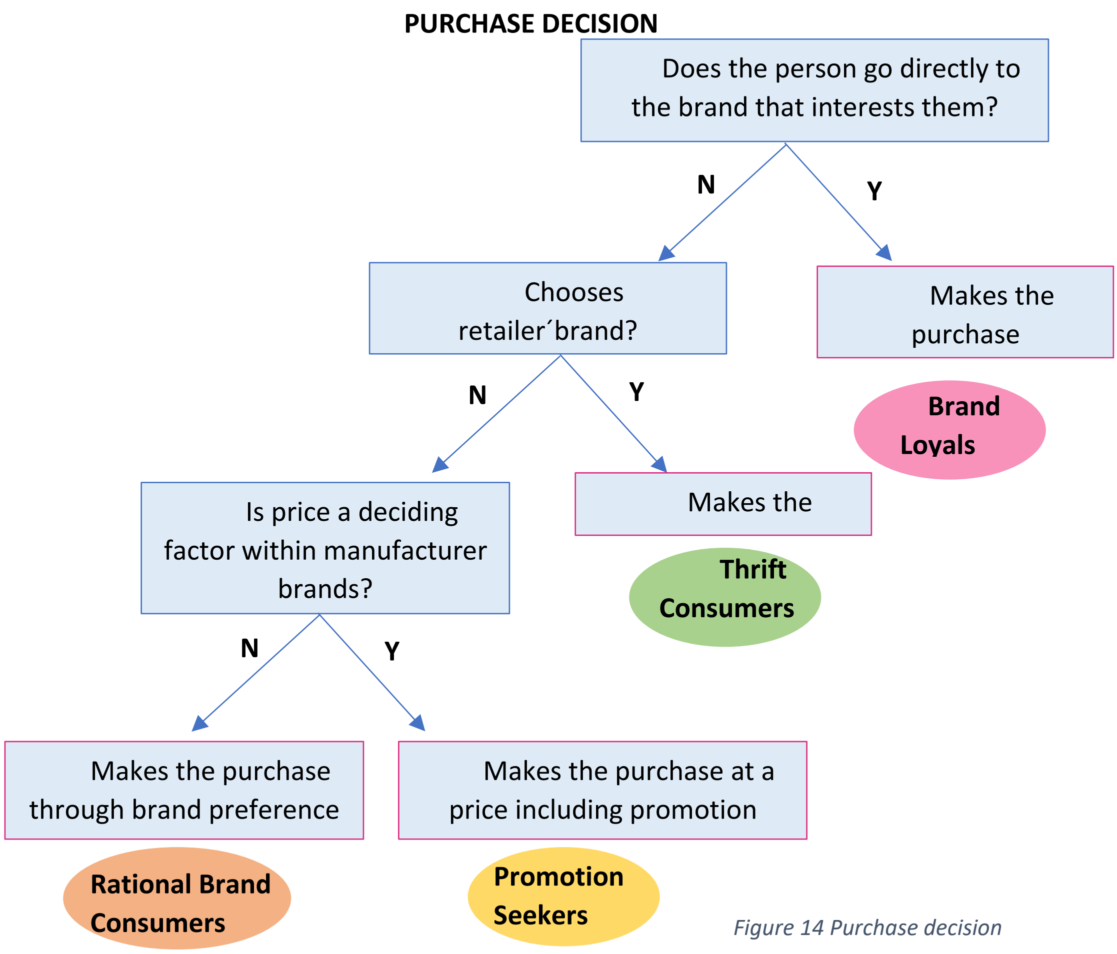
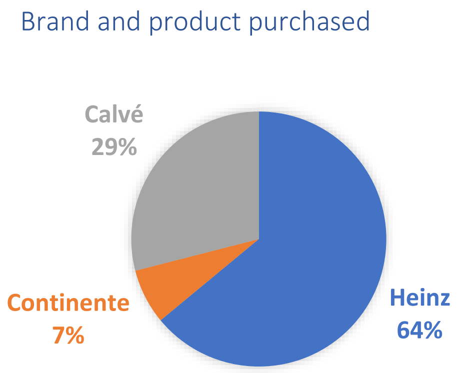


Figure 14 Purchase decision

As we can check above image, when we talk about purchase decision, we can have different behave ways which result in different consumers.

BRAND LOYALS	They look at the shelf to find their favourite brand. They are willing to buy new products, but of "their" brand.	Consumers aged between 35 and 60, middle class, with active professions, whose household has four members and at least one minor.	"In ketchup I always prefer Calvé. It may looks the same, but it's not!" (Man, 51 years old, accountant, Alfragide, family of 4 people, 1 minor).
THRIFT CONSUMERS	They are looking for the cheapest product, and are willing to buy the retailer's brand.	Only women, aged between 38 and 55, with at least one child living at home; in some cases the children are minors; they are mostly from the middle and lower-middle classes.	"In terms of ketchup it's the same. It all tastes the same" (Woman, 38 years old, school auxiliary, Amadora, family of 5 people, 3 minors).
RATIONAL BRAND CONSUMERS	They look at branded products and seek the best brand/preference ratio. They do not opt for retailer brands.	The majority are consumers between 35 and 60 years old, of middle and upper middle class, from families of 3 or 4 people, without children or adolescents.	"I look in the flyer to see which of my favourite brands is cheaper and take that one, XL size because it pays off more" (Woman, 55 years old, teacher, Grândola, family of 4 people).
PROMOTION SEEKERS	They look at branded products and choose the cheapest brand, retailer brands are not included in the choice options.	Most are between 50 and 60 years old, the family has no minors and they are mainly middle class. The only younger in this group live with their parents and go shopping for the family.	"I'm taking Calvé because it's on sale and on top of that my kids prefer it" (Woman, 54 years old, teacher, Porto, family of 4 people, without minors).

Table 25 Type of consumers



Habit, image of inartificial, personal taste.

Competitive price, good perceived quality, little difference to the big brands.

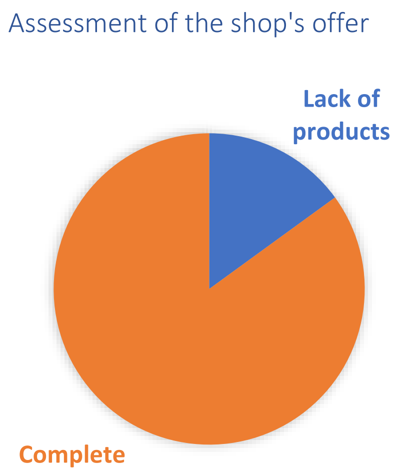
Tradition, habit, leadership image, personal taste.

Figure 15 Brand purchased and main reasons

The majority of consumers who chose Calvé are between 40 and 60 years old, middle class and do not belong to a household with more than four people and a minor.

What we observed the most was that they chose Heinz brand ketchup, with a greater weight being given to people under 30 years of age, with a family of less than four people and no minors. Most of the upper-middle class respondents are in this group, as are the students.

The majority of consumers buying the retailer's brand are lower-middle class, aged between 35 and 60.



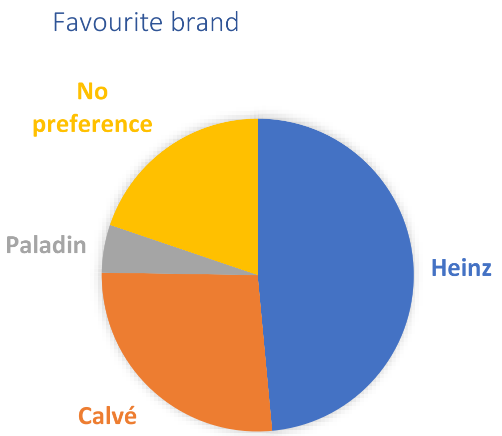
- Absence of major brands in some chains
- Not enough variety of spicy ketchup
- Not enough variety of ketchup with other flavours

Figure 16 Shop´s offer

Participants mention the lack of important brands such as Heinz and Paladin in the following supermarkets: Lidl and Intermarché.

The little variety of products in the Pingo Doce supermarkets was also mentioned.

Most of the consumers observed who criticised the poor variety of flavours (spicy and others) are under 25.



National brand and good quality-price ratio.

Tradition, habit, quality, taste, personal taste, practical packaging.

Tradition, habit, personal taste, taste, strong image.

Figure 17 Favourite brand

Consumers who consider Calvé their favourite brand are aged between 35 and 60 and the household has no minors or only one minor and are mostly from middle class.

The majority of those who prefer Heinz are under 35 and from families with less than four people. Here is the majority of the upper-middle class consumers observed, as well as almost all the students.

4.2.2. Mayonnaise

4.2.2.1. Mayonnaise purchase

Brand image

About the the mayonnaise category, the brand is a relevant criterion, with the Calvé and Hellmann's brands standing out as the brands with the strongest images. With regard to retailer brands, in this product category, the image of brands is not positive.

	The Calvé brand mayonnaise is one of the brands most indicated by the participants as having a positive image, only one family had a less positive opinion about the product.	"Not being able to do it at home, Calvé is the brand my daughter and I prefer" (Woman, 48 years old, teacher, Covilhã). "Calvé's is not bad at all. It's the one we use at home" (Woman, 51 years old, entrepreneur, Grândola).
	A considerable number of families report having a positive image of Hellmann's mayonnaise, although some participants believe it has "less taste".	"We've tried all the others but we always end up back to Hellmann's" (Woman, 53 years old, school employee, Serpa).
	Fewer participants have a positive image of Heinz mayonnaise, and even these are often due to the ketchup connection.	"I get the feeling that Heinz is fatter, but that could just a quirk of mine. And it's more expensive" (Woman, 41 years old, teacher, Maia).
	The participants refer to the brands Vianeza and Paladin as having a positive image of them. However, regarding the retailer brands mayonnaise, the majority have a negative image.	

Table 26 Brand image

Brands appreciated regardless of price

Hellmann´s and Calvé are the preferred brands whenever price is not a decision criterion.

In addition to these two big brands, some participants mention Heinz and only one mentions Paladin.

One of the participants says he would choose Aldi's retailer brand, as it is his favourite.

HELLMANN'S	If price is not one of the criteria when buying mayonnaise, almost half of the families claim to choose Hellmann's.	"We would always choose Hellmann's because it is my favourite. For my my mother they are all the same" (Man, 21 years old, trainee, Montijo).
Calvé	A considerable number of participants say they would choose Calvé mayonnaise if price were not a factor in the decision.	"The Calvé one is tastier and thicker. It's the one that looks just like mayonnaise!" (Man, 25 years old, receptionist, Grândola).

Table 27 Favourite brands regardless of price

What leads to purchase

The need to buy mayonnaise arises by necessity, when the product runs out, and not by opportunity. But for a few families sales promotions can have some impact on anticipating the purchase.

STOCK TO FINISH	Most of the families interviewed say they buy mayonnaise when the stock at home is running out, they are the most frequent consumers.	"We preferably buy before we run out, but often it's after we've run out or when it's past the deadline" (Man, 44 years old, consultant, Matosinhos).
PROMOTIONS	Some participants say that the main reason why they buy mayonnaise is because there are good promotions at sales points.	"As we are a large family, when we see a promotion we immediately buy several packages" (Woman, 52 years old, university teacher, Estoril).
SPECIFIC CIRCUMSTANCES	Only a small number of interviewees say that they don't always have mayonnaise at home, they only buy it when they need it, mainly in the summer or to prepare specific dishes.	"We buy only when we are going to use it in food, a hamburger or a steak on a bun, some fries..." (Man, 31 years old, commercial manager, Camarate).

Table 28 What leads to purchase

Purchase frequency

The repetition of the purchase of mayonnaise is lower than that of ketchup, occurring every two weeks up to two months, or sporadically.

REGULAR	**WHENEVER GOES SHOPPING**	Only a very small number of the participating households buy mayonnaise very frequently.	"In summer we probably buy a bottle a week, maybe even more" (Man, 55 years old, teacher, Serpa).
	FROM 15/15 DAYS TO 2/2 MONTHS	A significant number of respondents buy from every fortnight to every 2 months.	"We buy every months, unless we buy a large pack" (Woman, 49 years old, school assistant, Grândola).
SPORADIC	**FEW CONSUME**	A considerable number of the interviewees buy sporadically, since the family consumes little.	"Here at home, one pack could last a whole year!" (Woman,29 years old, marketeer, Miraflores).
	DOES LARGE STOCKS	Very few families buy mayonnaise sporadically because they keep stock at home.	"I've happened to buy five packs for finding a good promotion" (Woman, 52 years old, university teacher, Estoril).

Table 29 Purchase frequency

Choices at the time of purchase

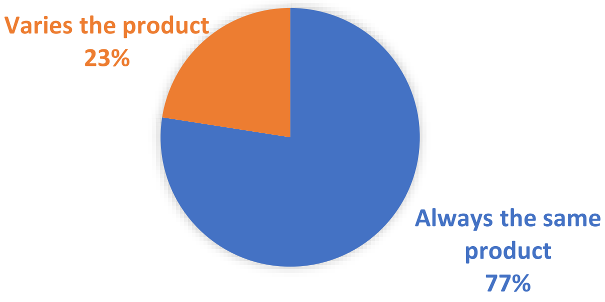


Figure 18 Product choice

Regarding the purchase of mayonnaise, most families choose to always buy the same product or, at most, choose between two. "We always buy regular Hellmann's. We don't make it up because the others don't taste the same" (Man, 49 years old, commercial director, Fátima).

A small number of families vary the brand and type of mayonnaise they buy, deciding at the time of purchase. "I always buy the normal one. Then, from the ones I know (Calvé, Hellmann's or Heinz) I choose the cheapest" (Woman, 45 years old, logistics worker, Leça do Balio).

Most of those interviewed say they are loyal to the brands, although they may vary the type of product (garlic mayonnaise, light...).

Those who choose between two or three products at the time of purchase, usually buy mayonnaise of the main brands, with price being a decisive factor.

Regarding the type of mayonnaise chosen, most of the participating families buy the traditional mayonnaise, which they call "normal". Still, there are some who prefer the low-fat or light mayonnaise. Several interviewees point to garlic mayonnaise as their favourite. There are few who prefer olive oil mayonnaise or vegan mayonnaise, as they consider them to be healthier.

Type of packaging chosen

SMALL (250 GR)	Smaller families and those more concerned about shelf life prefer the small packet of Mayonnaise.	"The one who eats the most mayonnaise is our eldest son and with small packages it is easier to control" (Woman, 50 years old, civil engineer, Loures).
MEDIUM (500 GR)	The medium-sized households (3 to 4 people) that consume mayonnaise most regularly prefer medium-sized packages.	"My husband always wants the big one, but I insist it should be the medium one because it more in line with what we spend" (Woman, 46 years old, teacher, Grândola).
BIG (700 GR)	Heavy users buy large packs of mayonnaise since it lasts longer and because they believe it is more economical.	"I always take the big ones, because the small ones wear out in an instant and it doesn't end up worthwhile" (Woman, 55 years old, cleaning lady , Camarate).

Table 30 Type of packaging chosen

The choice of mayonnaise package size depends on the family's level of consumption, as there are several participants who are concerned about shelf life.

Several interviewed families mention that the size of the package they choose depends on the promotions offered at the time of purchase.

A significant number of respondents mention top-down packaging, but some prefer glass packaging because they believe it is better preserved.

Types of promotions used

DIRECT PRICE DISCOUNT	Most of the interviewed families prefer direct price discounts and pay attention to these promotions.	"We only care about the discounted price, but we won't stop buying Hellmann's if it's not on promotion and others are" (Man, 31 years old, manager, Porto).
COUPONS AND CARDS	A small number of participants take advantage of the discount coupons and/or the card discounts on the purchase of mayonnaise.	"I always try to take advantage of discounts on the price, the Continente coupons or the 15% credit card" (Woman, 43 years old, teacher, Covilhã).
PRODUCT PACKS	A small proportion of the families believe that product packs could be useful, but only if they are products they use frequently.	"If, for example, I know that I'm going to make a dish that needs a lot a lot of mayonnaise and there are pack promotion, I'll take advantage of it" (Woman, 41 years old, teacher, Maia).

Table 31 Types of promotions used

Some families interviewed said they did not attach any importance to promotions when buying mayonnaise, because it is a product they consume frequently, is essential in the family and has a shelf life.

Changes in purchasing habits during lockdown

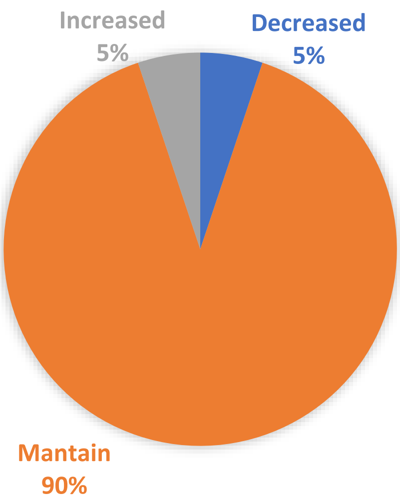


Figure 19 Changes in purchasing habits

Regarding mayonnaise purchase and research question 2, we observed that most families did not change their mayonnaise purchasing habits during confinement. "The amount of mayonnaise consumed was only maintained because we limited the consumption of our oldest son! Always at home, if he could, he would eat twice as much" (Woman, 50 years old, engineer, Loures).

Only a small number of respondents claim to have reduced their purchase of mayonnaise during confinement. "We bought less because we had fewer parties, there were fewer stuffed cheese rolls..." (Woman, 30 years, working-student, Porto).

A small number of participants refer to having increased their purchase of mayonnaise during confinement. "We had to buy more because eating at home we spent much more quantity" (Woman, 53 years old, school employee, Serpa).

Regarding the place of purchase, all participants said that the lockdown has not changed the places where they usually buy mayonnaise, apart from an increased use of e-commerce and local shops.

Post-confinement purchasing habits

- **Purchased quantities:** most of the respondents stated that the quantities of mayonnaise they bought after confinement have not changed at all. In addition, some families believe that the amount of mayonnaise bought may increase when they can fully return to dinners at home with friends and family. And few of them affirmed that they want to reduce the amount of mayonnaise they buy because they think that they should abandon the food excesses that characterized them during their confinement.

- **Purchased place:** most of the interviewed families report that they continue and will probably continue to buy mayonnaise from the same places where they bought it during the confinement, with some minor changes regarding the decrease in e-commerce and local shops.

4.2.2.2. Mayonnaise consumption

In total, 38 of the 52 families interviewed consume mayonnaise

Ways of consumption

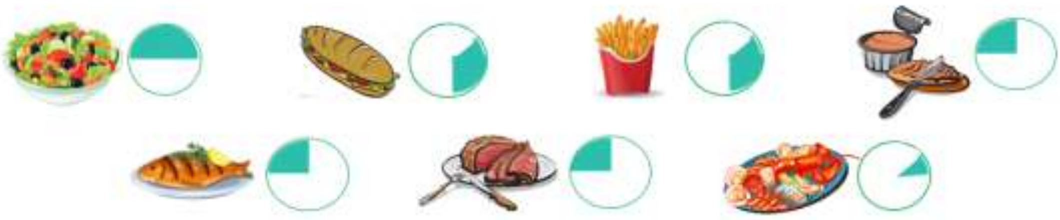


Figure 20 Ways of consumption

The interviewed families use mayonnaise in a wide range of dishes, cold or cooked.

The dishes mentioned most often by the interviewees are salads, sandwiches, and fries, followed by pâtés, fish dishes and meat dishes.

Some also use it in pasta and seafood.

"We love Russian salad. Always with mayonnaise, of course!" (Woman, 38 years old, analyst, Sines).

"Sandwiches and fries must have mayonnaise" (Woman, 53 years old, lawyer, Serpa).

"The pâtés, like the tuna, are a real delight!" (Woman, 62 years old, nurse, Lisboa).

"I use mayonnaise in all tuna dishes" (Man, 72 years old, retired, Oeiras).

"I use it a lot in meat dishes like burgers and steaks" (Woman, 54 years old, computing, Fátima).

"With seafood and shrimp the mayonnaise is essential" (Man, 56 years old, evangelical pastor, VN Sto. André).

Who consumes in the family

In most of the participating families all the members consume mayonnaise. "We both eat mayonnaise, but the big consumer is without a doubt my mother" (Woman, 22 years old, university teacher, Covilhã).

In a small part of the sample only a part of the family usually consumes mayonnaise. "At home it's mostly the kids who eat. They put mayonnaise on almost everything!" (Woman, 40 years old, manager, Sacavém).

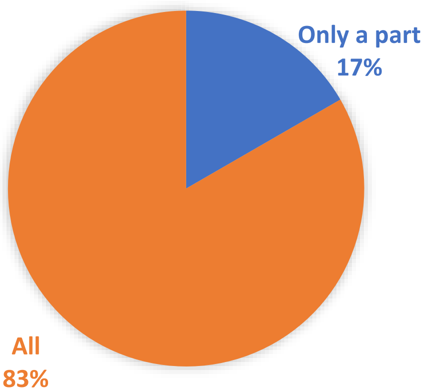


Figure 21 Who consumes in the family

Among the families that only some consume mayonnaise, the youngest are the main consumers.

The families that claim not to consume mayonnaise do not do so for health reasons.

Mayonnaise consumption before lockdown

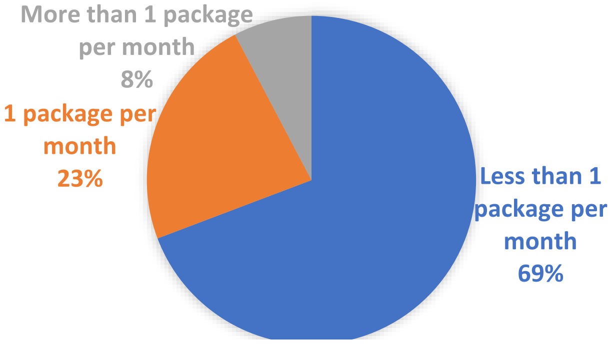


Figure 22 Consumption before lockdown

Some families claim to consume, on average, one packet of mayonnaise per month. "Normally, one bottle is thing to last a month here at home" (Woman, 36 years old, tutor, Alcácer do Sal).

Most consume less than one package a month, with some mentioning one per year. "It's the kind of thing that stays in the fridge for months and months!" (Woman, 29 years old, architect, Grândola).

Only a small number of the interviewees say they consume more than one package per month, and these are the ones who choose smaller packages. "My daughter and I eat mayonnaise with everything! One jar is enough for 2 to 3 weeks" (Woman, 45 years old, logistics employee, Leça do Balio).

Apart from the heavy users who stated that they consume mayonnaise throughout the year, among the remaining interviewees there were several who referred to consuming it more frequently in the summer.

Changes in consumption habits with confinement

Regarding the impact of confinement in consumption habits and relating to research question 3, for most families there were no changes, the majority maintained the same level of mayonnaise consumption, with some assuming they reduced consumption because it was associated with festive and social situations.

SAME QUANTITY	Most participating households maintained the same level of mayonnaise consumption during confinement.	"Before the pandemic we used a lot and we haven't changed much" (Woman, 53 years old, teacher, Amadora).
INCREASED THE QUANTITY	A small number of the interviewees increased their mayonnaise consumption, and because they started eating more meals at home.	"We consumed more because we had more meals at home" (Woman, 29 years old, AECS employee, Serpa).
DECREASED THE QUANTITY	Only a very small number of respondents report having reduced their mayonnaise consumption during lockdown.	"I think we consume less because we started having healthier things at home" (Woman, 29 years old, engineer, Lisboa).

Table 32 Changes in consumption habits with confinement

Expectable habits after return to "normal"

Given what we have concluded above, for most families, after confinement there were no changes in the quantities purchased nor in the places of purchase.

Most of the interviewed families believe that when they fully return to "normal" life, the mayonnaise consumption habits they had during confinement will remain. For the most part, these interviewees were the ones who claimed not to have changed their mayonnaise consumption during confinement.
Some families refer that after the return to "normal" they will consume less mayonnaise, mainly due to the fact that they will have fewer meals at home and will also try to have a healthier diet.
A small number of participants say they will consume more mayonnaise as social life will return with more meals at home with family and friends.

Table 33 Expectable habits after return to "normal"

Stock levels

1 PACKAGE	Most of the families interviewed have an extra package of mayonnaise at home in addition to the one they are using.	"We only have one bottle because it's a product that we are afraid of letting it go past its expiry date" (Woman, 51 years old, enterpreneur, Grândola).
2 PACKAGES	Some interviewees reported having two packages of mayonnaise in stock, with some having the second from the retailer´s brand for cooking.	"We always have a reserve of two large bottles of Hellmann's, because I don't like to run it out" (Woman, 30 years old, working-student, Porto).
MORE THAN 2 PACKAGES	Only a small number of the interviewed families have a stock of more than 2 packages, mainly because they take advantage of price discount promotions.	"Whenever I get a good promotion, I buy 2 to 5 bottles, because it ends up being used up" (Woman, 52 years old, university teacher, Estoril).

Table 34 Stock levels

Regarding the size of the mayonnaise package they have in stock, the majority refer to the large package, with a significant number of the interviewed families preferring the small package, especially in families with fewer elements. Very few mentions medium-sized packages.

Awareness of communication messages

Almost half of the interviewed families have no memory of any kind of communication from mayonnaise brands, either in the media or on social media.

	Only a small number of the participants remembered any kind of communication messages from Calvé mayonnaise.	"From Calvé yes, a lot. There's an advert on TV that I think is fabulous, very well done" (Woman, 41 years old, teacher, Maia).
	Some of the interviewed families remember Hellmann's mayonnaise communication messages.	"It was many years ago, but the one about Hellmann's, real mayonnaise" (Woman, 43 years old, teacher, Covilhã).
	Rare are the participants who recall communication messages from Heinz mayonnaise.	"I remember seeing Heinz mayonnaise ads, but only on YouTube" (Woman, 19 years old, university teacher, Grândola).

Table 35 Awareness of communication messages

4.2.2.3. Post-use behaviour of mayonnaise

Knowledge and share of experiences

None of the respondents recall ever having a conversation about packaged mayonnaise, either in person or through digital channels.

There are also no participants who have shared experiences of buying and/or consuming mayonnaise.

"I don't recall ever having a conversation about mayonnaise with anyone or finding any publication on the internet on the subject" (Man, 46 years old, insurance intermediary, Maia).	"About mayonnaise I've already talked with friends about recipes and tricks for homemade mayonnaise not to curdle, but I don't remember we ever talked about bottled mayonnaise..." (Woman, 62 years old, nurse, Lisboa).

4.2.2.4. Shadowing: mayonnaise purchase

Reasons for buying again

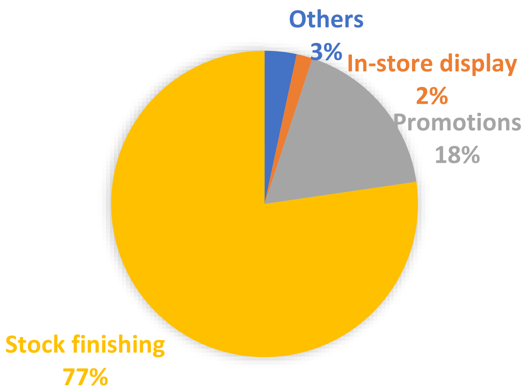


Figure 23 Reasons for buying again

Most people looking for mayonnaise promotions are above the age of 35 and are from the middle or lower-middle class. Although there are some cases of consumers under the age of 25 looking for promotions.

Some consumers mentioned impulse buying when they feel like a dish with mayonnaise.

> "I even have it at home, but if it's on sale I'll buy it, because it's something you spend" (Woman, 48 years old, retired, Fátima, family of 3 people, 1 minor).

> Mayonnaise is one of those things that I only buy when I really feel like eating it" (Woman, 49 years old, teacher, Álcacer do Sal, family of 4 people, 1 minor).

Behaviour in the event of product rupture

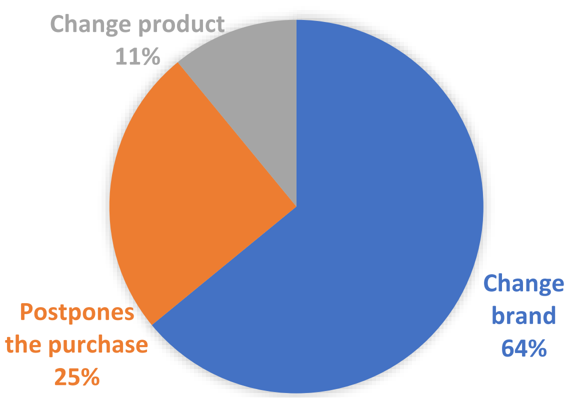


Figure 24 Behaviour in the event of product rupture

In the event of a rupture of the product they usually buy, the majority of participants choose to change brands, looking for the cheapest reference brand, with the retailer's brand not being a possibility.

Consumers who prefer to postpone the purchase are part of the same social class, and most are over 45 years old, although there are some cases of consumers under 30 years old with this behaviour.

PURCHASE DECISION

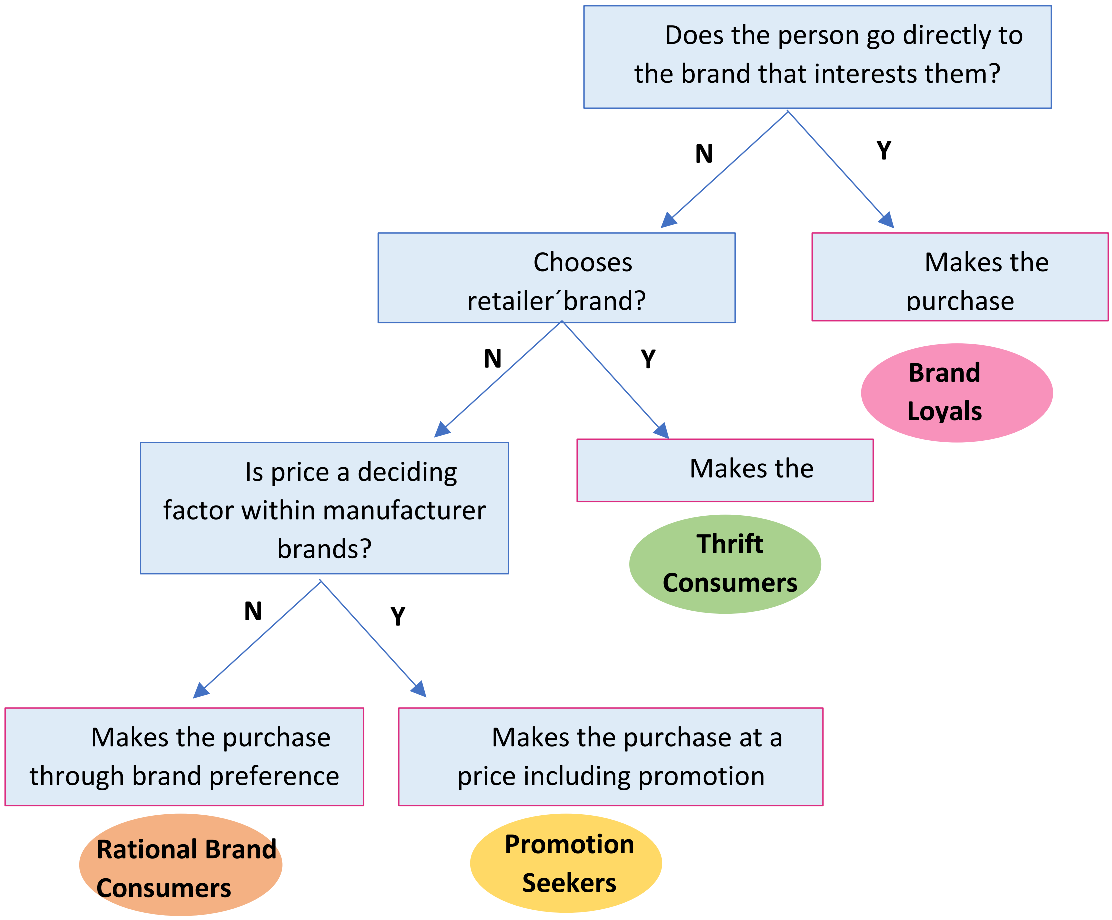


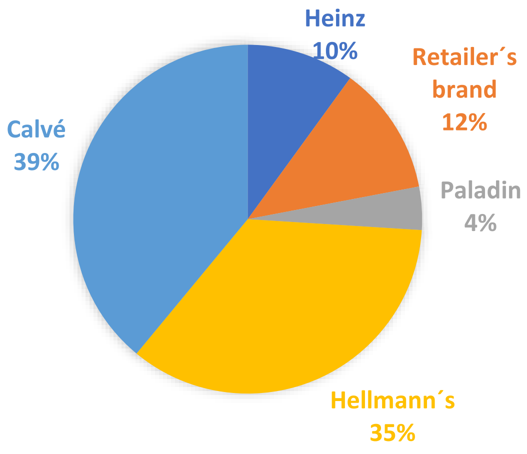
Figure 25 Purchase decision

As we can check above image, when we talk about purchase decision, we can have different behave ways which result in different consumers

BRAND LOYALS	They look on the shelf for the brand and product they usually buy, with price not being a criterion. They are open to the retailer's brand.	It is the largest cluster in the study and is mainly made up of consumers over the age of 40, with few young people (under 30) in this group. Most of these consumers belong to families with minors.	"I don't even have to look very hard. I already know that I'm going to Hellmann's, which is our favourite" (Woman, 38 years old, school auxiliary, Amadora, family of 5 people, 3 minors).
THRIFT CONSUMERS	Compare the prices of brands he/her knows, including the retailer's brand, and choose the cheapest product.	Most are over 50 years old and from the interior of the country, with few cases of them belonging to a family with minors. They belong mainly to the middle and lower-middle classes, with rare exceptions.	"I like Heinz and Calvé, but Continente is much cheaper, so I'm going to opt for take that one" (Man, 48 years old, school auxiliary, Fátima, family of 3 people).
RATIONAL BRAND CONSUMERS	Within the available offer, they look for the brand they prefer on the shelf, then choose the product they are going to buy.	The majority of these consumers are over 45 years old and belong to the upper-middle class, distributed throughout the national territory and with a minor child in the family. The few young people in this cluster live with their parents and buy for the family.	"I'll take the regular Heinz mayonnaise, but I can't resist buying the truffle mayonnaise too, to try it out. It must be delicious!" (Man, 22 years old, university teacher, Tavira, family of 2 people).
PROMOTION SEEKERS	They look carefully for brands that are on promotion and choose the most competitive prices, with the retailer's brand being among the options.	Many of these consumers are young people under 30, but some are over 45, mainly from the middle and lower-middle classes. In most cases, they do not have minors in the family.	"Calvé is not my favourite mayonnaise, but since it's on sale I'll take it" (Woman, 60 years old, retired, Grândola, family of 2 people).

Table 36 Type of consumers

Brand and product purchased



Leadership image, personal taste.

Competitive price, good perceived quality, little difference to the big brands.

Portuguese brand, personal taste.

Habit, promotion, personal taste.

Habit, personal taste.

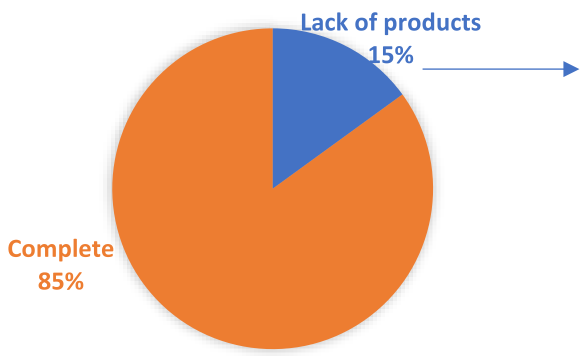
Figure 26 Brand purchased

Most consumers who purchased Calvé mayonnaise are over 50 years old, middle class and do not belong to a family with more than 4 people.

Almost all participants who chose Hellmann's are under 50, with a significant portion being under 30, and the majority being middle class.

Heinz buyers are very diverse in terms of age and largely belong to the upper-middle class.

Assessment of the shop´s offer



- Absence of important brands (Heinz, Paladin and Vianesa) in the Lidl chain.
- Little variety of special mayonnaise (light, garlic...) in supermarkets.
- Replacement faults

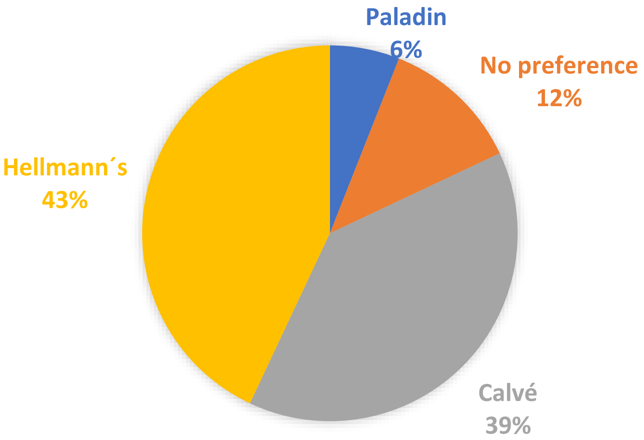
Figure 27 Shop´s offer

Consumers observed report the unavailability of important brands (such as Heinz, Paladin and Vianesa) in the supermarkets of the Lidl chain.

The little variety of products in supermarkets, as opposed to hypermarkets, is also mentioned.

Complaints about the lack of garlic mayonnaise are mainly from consumers in the region of Porto.

Favourite brand



National brand, healthy image, good advertising.

Quality image, natural flavour, "real mayonnaise".

Loyalty, habit, tradition, personal taste, "unique taste".

In addition to consumers who say they have no preference; this also includes those who mention more than one brand.

Figure 28 Favourite brand

Table 37 Brand imageFigure 29 Favourite brand

Consumers who prefer the Hellmann's brand are very varied in terms of age, social class, geographic location, and household composition.

The majority of those who prefer Calvé are over 35, with a high number aged over 50, and belong to families with at least one minor. These are also the majority of the upper-middle class consumers observed.

5. CONCLUSION

In the scope of the buying habits, it is verified that in general, all the members of the family can be considered as buying agents. However, during confinement, families have chosen to have only one member of the family doing the shopping. In this sense, communication should not focus on the housewife.

Supermarkets are the most preferred retail surfaces. In terms of brands, the most visited brands are: Continente, Pingo Doce and Lidl and they all raise a very positive image with consumers.

In terms of influence on the decision of where to buy, the housewife is the agent with a more preponderant role as the final decision maker. This situation also occurs in online shopping, where even if it is the man who does the shopping, the woman is responsible for the list.

Regarding the average time spent shopping, most respondents spend between 15 and 45 minutes.

Within this analysis, we can conclude that most respondents make a shopping list and sauces, and broths are part of that list.

Regarding the first research question: “What are the changes in living and purchasing habits during the pandemic that still remain?”, we highlight the reinforcement of online shopping and the decrease in the frequency of shopping. It is important to mention that of these two aspects, once the confinement was overcome, respondents maintained their level of frequency of purchase: the pandemic reduced the frequency of purchase and this behaviour continued after the confinement was overcome.

With regard to online shopping, around 45% buy physical products and the most popular categories are technology, clothing and footwear. Food, cosmetics, and perfumes are the least purchased categories. However, during the lockdown, online purchases of food products increased and suffered a minimal reduction after the lockdown.

The increase in online shopping was due to three main reasons: comfort, convenience, and ease. Respondents identified the impossibility of touching the products as the biggest challenge.

In this sense, this study reinforces the idea of the growth of online shopping for packaged products and regular purchases and the trend of shopping in physical locations for fresh or new products.

Regarding the specific analysis of ketchup, we can highlight as main conclusions the importance of the brand. Although the interviewees assume that they have a positive image of the retailers' brands, they consider that the products of these brands do not have the same quality as the other brands. The Heinz and Calvé brands appear as the brands with the most positive image, making price a non-determinant purchase criterion.

The purchase of ketchup tends to be a purchase that arises from the recognition of a need, since most interviewees stated that they buy this product when they run out. This category also shows a potential for brand loyalty, since most families mentioned that they always buy the same brand.

With regard to sensitivity to sales promotions it was found that families prefer promotions whose mechanism is to give more, immediate and certain benefit, specifically the direct price reduction technique.

Answering to the second research question: “What are the changes in purchasing habits, during the pandemic, specifically in the sauces category that still remain?”, the confinement did not have a great impact on the families regarding the habits related to ketchup category. We can only mention a slight increase in the quantities purchased (probably due to the higher number of meals eaten).

In terms of purchasing, the brand is one of the most relevant criteria, even though, in the absence of the preferred brand, consumers choose another brand. The purchase tends to be made out of necessity and not so much by opportunity, decreasing the impact of sales promotions.

The Calvé brand was mostly purchased by consumers aged between 40 and 60, while the Heinz brand was purchased by consumers aged under 30. Calvé is typically consumed by households with larger households than the Heinz brand.

There is a correspondence between the preferred brand and the brand purchased, which is natural since we are talking about fast-moving consumer goods where there is a positive correlation between these two indicators, that is, between the affective indicator - preference and the behavioural indicator - purchase.

Given the brand sensitivity, the families mentioned that in some retailers, such as Lidl and Intermarché, the Heinz and Paladin ketchup brands are not available.

With regard to the main conclusions of the mayonnaise category, the brand appears as a relevant criterion, with the Calvé and Hellmann's brands standing out as the brands with the strongest images. These brands are the preferred brands whenever price is not a decision criterion. About retailer brands, in this product category, the image of brands is not positive.

The need to buy mayonnaise arises by necessity, when the product runs out, and not by opportunity. Still for a part of the families, sales promotions can have some impact on anticipating the purchase.

The repetition of the purchase of mayonnaise is lower than that of ketchup, occurring every two weeks up to two months, or sporadically.

Regarding mayonnaise purchase and research question 2, we observed that most families did not change their mayonnaise purchasing habits during confinement. Only a small number of respondents claim to have increased or decreased their mayonnaise purchasing habits. And about the post-confinement, most of the respondents stated that the quantities of mayonnaise they bought have not changed at all. In addition, some families believe that the amount of mayonnaise bought may increase when they can fully return to dinners at home with friends and family. And few of them affirmed that they want to reduce the amount of mayonnaise they buy because they think that they should abandon the food excesses that characterized them during their confinement.

In this product category, families assume a brand-loyalty behaviour, recognising that they can always buy between a set of two brands. Since this category has a marked diversity of ranges, it is important to understand that families tend to opt for the traditional mayonnaise, the size of the package depending on the household, or on the existence of sales promotions. Despite this behaviour, if the preferred brand is not available, families buy another brand, and retailer brands are not an option.

The preferred brands tend to be the brands purchased. Calvé is purchased by consumers aged 50+ from households with less than 4 members. Helmann's is mainly chosen by consumers aged under 50 from middle-class households.

Regarding sales promotions, as in the ketchup category, families prefer immediate, certain, and ask-for-less promotions, typically associated with price reductions and discounts.

In relation to the distribution of this product, the families refer that they frequently verify the unavailability of brands such as Heinz, Paladin and Vianesa in the Lidl supermarket chains.

In regard to the ketchup consumption, it is mostly with potatoes. It is interesting to note that the non-consumption of this product is not associated with health issues but only with consumer taste.

Regarding research question 3: "What are the changes in consumption habits, during the pandemic, specifically in the sauces category, that still remain?", we can say that when we talk about ketchup consumption and its changes with confinement, most of the interviewed families maintained the same habits. And the majority refer that its consumption habits during lockdown will be maintained when everything is fully back to "normal".

Considering the impact of confinement in consumption habits of mayonnaise, for most families there were no changes, with some assuming they reduced consumption because it was associated with festive and social situations. In this sense, for most families, after confinement there were no changes in the quantities purchased nor in the places of purchase.

Thus, we can conclude that for both sauces the confinement and post confinement did not provoke changes in consumption habits. Consequently, the same habits will remain in the post-confinement.

Mayonnaise is a product used in very diverse dishes, such as salads, sandwiches, fried foods, meat and fish dishes and pâtés.

In most families all the members consume mayonnaise, and when this is not the case, young people are the main consumers of the product.

This product may have a more seasonal consumption, associated with the summer season.

In general terms we can also add that for ketchup and mayonnaise the recall of communication campaigns is very low. Even so, the ketchup brand with the highest recall was Heinz and the mayonnaise brand was Hellmann´s. Likewise, families also mentioned that they do not remember having conversations about these products, demonstrating that the degree of consumer involvement with ketchup and mayonnaise is low.

To sum up, we can see that although the pandemic, in general terms, have caused changes in the consumption and purchasing habits of families, when we analyse the category of ketchup and mayonnaise products specifically, no such impact was observed. In this sense, these categories are assumed to have a rigid demand, associated with a purchase decision process based on the recognition of needs and low involvement with the product.

6. MANAGEMENT IMPLICATIONS

Based on the study we can systematize three possible management implications for FMCG companies, particularly at the level of sauces:

1. The brands' communication should not be focused only on the housewife. Although the housewife is a determining decision-making agent, we could verify the involvement of the various household members in the decision of the place of purchase, the purchase and the use of the product;
2. Sauce brands should, based on their diversity of range and flavours, stimulate the learning of new dishes by the different family members. The brands could also help housewives feel more inspired to diversify their dishes by taking advantage of different sauces/ seasonings;
3. This product category tends to be bought on the basis of recognizing a need (stock running out), which limits the impact of sales promotions, since consumers tend not to anticipate the purchase on the basis of an opportunity. However, when brands do carry out sales promotions, we find that the mechanism of asking less, immediate and certain discount, such as price reduction, are the promotions with the greatest impact on consumers;
4. In general terms, we can alert brands that sauce categories tend to have a rigid demand in the face of risk and uncertainty situations, such as the pandemic. On the one hand, this issue allows brands to assume that when faced with a situation like Covid19, demand for this type of product will be maintained. On the other hand, this rigidity of demand may also indicate a lower impact of sales promotion activities, which can sometimes increase the challenges of managing this category.

7. LIMITATIONS AND FUTURE RESEARCH

This study had some limitations which should be considered. Regarding methodology, it is important to mention that the sample is by convenience, and, for this reason, the results cannot be generalized to the remaining population.

Additionally, the sample size is small considering the target public of the fast-moving consumer goods categories. Furthermore, this study focuses essentially on two product categories. Finally, the study uses only a qualitative approach, limiting the possibility of data generalization.

Thus, considering the identified limitations, some changes are suggested for future research.

Firstly, it is suggested it is suggested to do an identical study 1 year after the pandemic, since this study was done in collaboration with the Marketing Future Cast Lab, it had a stipulated time interval that was between the end of May 2021 and the end of July 2021. And since the last confinement ended at the beginning of May this year, there may not have been enough time to study the habits and behaviours that remained. It would also be interesting to do this study in another country, in order to be able to compare the pandemic effect.

It would also be interesting to use a quantitative methodology, based on questionnaires, in order to study a representative sample of the population.

Next, and since this study only covers two FMCG categories, it would be interesting to replicate this study to other non-food product categories in the future in order to understand the impact of the pandemic on other products. And do an in-depth study on one of the sub-themes: buying, consumption, sharing.

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ATTACHMENTS

Annex A- In Situ script

Caracterização do agregado

Relativamente a cada membro do agregado familiar

1-Atividades profissionais? Ou de estudo?

2- Local de trabalho? Ou de estudo?

3-Quem está em teletrabalho? (total ou parcial). No caso de estar o que é que a empresa prevê até final do ano?

4- Como evoluíram os hábitos de cozinhar em casa? Quem cozinha? Que tipo de refeições gostam de cozinhar? Evoluíram em sofisticação, sim ou não?

5-Sobre sustentabilidade. Separa o lixo? Prefere comprar embalagens recicláveis? De que produtos?

6- Explique-nos todas alterações significativas que teve que fazer na sua vida em família, no trabalho, no acompanhamento dos filhos ou dos pais (quando têm), nos hábitos alimentares, formas de comprar…

7- Gostaríamos de perceber o que alteraram ente março de 2020 e junho de 2021, com objetividade. E que dificuldades tiveram, mas também o que trouxe de bom (por exemplo mais refeições em família e mais proximidade, melhor comida feita em casa…)

8 - Depois, para cada uma das alterações mencionadas, acham que as vão manter num prazo de 5 a 6 meses? Relacionar a manutenção dos novos hábitos adquiridos com o regresso ao trabalho, saber o que está previsto pelas empresas onde trabalham

A: Hábitos Gerais de Compra

A.1- Em termos de compras de produtos de consumo quem vai habitualmente às compras?

A.2- Onde? (hiper, super, loja de proximidade) E insígnia?

A.3- Com que frequência?

A.3- No caso de irem várias pessoas do agregado, quem decide o local? E quem decide a loja?

A.4- Qual é em média o tempo despendido em cada tipo de loja?

A.5- Quando vai às compras leva lista de compras? Questionar se é para a todos os produtos que estamos a estudar (bebidas quentes, caldos, molhos salgados, limpeza) ou apenas para alguns

A.6- Qual é a imagem das principiais insígnias de loja? (Continente, Pingo Doce, Auchan, Intermarché, Minipreço...)

A.7- Houve alterações durante o confinamento? Se sim quais?

A.8 - Quais as alterações que se mantiveram?

A.9 - Compram por e-commerce? Se sim que categorias de produtos?

A.10 - Nos produtos que vamos estudar (bebidas quentes, caldos, molhos salgados, limpeza, refeições…) quais compra habitualmente online? Já comprava antes da pandemia? Vai continuar a comprar?

A.11 - Em que site?

A.12 - Quem faz as compras por e-commerce?

A.13 -Quais os benefícios do e-commerce (conveniência, possibilidade de fazer compras em qualquer lado, conforto, estilo tecno, variedade de sortido, acesso a informação, poupança de tempo, menos stress, benefícios económicos, acesso a promoções)?

A.14 - Quais as barreiras do e-commerce (disponibilidade de informação pessoal, risco de pagamento, ceticismo, falta de confiança, impossibilidade de ver e tocar os produtos perecíveis)

A.15 - Com que regularidade?

A.16 -Quais os benefícios do home delivery (conveniência, variedade de sortido, variedade de retalhistas, poupança de tempo, promoções)?

A.17 - Quais as barreiras do home delivery (produtos perecíveis, necessidade de presença em casa

A.18 - Para os que passaram a comprar mais em e-commerce (bebidas quentes, caldos, molhos salgados, limpeza) durante a pandemia: pensam continuar a comprar os mesmos produtos em e-commerce ou vão voltar às lojas? Em que produtos, em concreto?

F.1 : Compra de Ketchup

F.1.1 -No caso do Ketchup, como é o seu processo de escolha quando chega à prateleira: Começa por a) Tipo de produto? (normal, com redução de açúcar, redução de sal, picante…) b) Marca ? (Calvé, Heinz, Paladin, MD...) c) Preço?

F.1.2 - Qual é a imagem que tem das 4 principais marcas? (Calvé, Heinz, Paladin, MD) . Distingue-as?

F.1.3 - Quando chega à prateleira do supermercado existem várias opções em termos de produtos (normal, com redução de açúcar, redução de sal, picante) E vários tipos de embalagem (cerca de 250 grs, 500 grs e 700 grs) . Qual escolhe? E quais são as razões para escolher um ou outro? (gosto porque já experimentou vários, promoção, quer ir experimentando)

F.1.4 - No agregado familiar independentemente de questões de preço que marca prefeririam?

F.1.5 - O que o leva a voltar a comprar? (está a terminar stock em casa, aproveitar promoções, impacto da exposição na loja, ..)

F.1.6 - Em relação a promoções que tipo tem aproveitado (desconto de preço, packs de produtos, cupões, outras?)

F.1.7 - Qual é a frequência de compra de cada um desses produtos?

F.1.8 - Durante o confinamento quais foram as alterações nos hábitos de compra de Ketchup?

F.1.9 -Quais os hábitos que se mantiveram após terminar o confinamento?

F.2: CONSUMO de Ketchup

F.2.1 - Quais os momentos de consumo? (carne, massas, outros)

F.2.2 - Insistir se tinham dito que não consomem: nunca colocam ketchup às refeições para acompanhar algum prato? Porquê?

F.2.3- Quem consome em casa?

F.2.4 - Antes do confinamento quantas embalagens de Ketchup eram consumidos por mês?

F.2.5 - Quais as alterações dos hábitos de consumo com confinamento?

F.2.6 - Quais os hábitos que se mantiveram, após terminar o confinamento ou que se irão retomar após voltar a situação de trabalho na empresa?

F.2.7 -Que níveis de stocks (especificar dimensão das embalagens) têm habitualmente em casa por tipo de Ketchup?

F.2.8 -Qual é o conhecimento das mensagens de comunicação das marcas (Calvé, Heinz e Paladin)?

F.3: Comportamentos Pós-Consumo de Ketchup

F.3.1 - Lembra-se de lhe terem contado experiências, a nível físico ou digital, de compra e/ou de consumo de produtos ou marcas de Ketchup?

F.3.2 -Lembra-se de ter partilhado a experiência, a nível físico ou digital, de compra e/ou de consumo de produtos ou marcas de Ketchup?

G.1 : Compra de Maionese

G.1.1 -No caso da Maionese, como é o seu processo de escolha quando chega à prateleira: Começa por a) Tipo de produto? ("normal", magra/light, alho...) b) Marca? (Calvé, Hellmann's, Heinz, Paladin e Vianesa, MD…) c) Preço?

G.1.2 - Qual é a imagem que tem das 6 principais marcas? (Calvé, Hellmann's, Heinz, Paladin, Vianesa e Marca Distribuidor). Distingue-as?

G.1.3- Quando chega à prateleira do supermercado existem várias opções em termos de produtos ("normal", magra/light, alho, …) E vários tipos de embalagem (pequenas com cerca 250 grs., médias com cerca de 450 grs e maiores com cerca de 750 grs). Qual escolhe? E quais são as razões para escolher um ou outro? (gosto porque já experimentou vários, promoção, quer ir experimentando)

G.1.4 - No agregado familiar independentemente de questões de preço que marca prefeririam?

G.1.5- O que o leva a voltar a comprar? (está a terminar stock em casa, aproveitar promoções, impacto da exposição na loja...)

G.1.6 - Em relação a promoções que tipo tem aproveitado (desconto de preço, packs de produtos, cupões, outras?)

G.1.7 - Qual é a frequência de compra de cada um desses produtos?

G.1.8 - Durante o confinamento quais foram as alterações nos hábitos de compra na Maionese?

G.1.9 -Quais os hábitos que se mantiveram após terminar o confinamento?

G.2: CONSUMO na Maionese

G.2.1 - Quais os momentos de consumo? (peixe, marisco, saladas, outro prato, que tipo de pratos?)

G.2.2 - Insistir se tinham dito que não consomem: nunca colocam maionese para acompanhar algum prato? Porquê?

G.2.3 - Quem consome em casa?

G.2.4 - Antes do confinamento quantas embalagens de maionese eram consumidos por mês?

G.2.5 - Quais as alterações dos hábitos de consumo com confinamento?

G.2.6 - Quais os hábitos que se mantiveram, após terminar o confinamento ou que se irão retomar após voltar a situação de trabalho na empresa?

G.2.7 -Que níveis de stocks (especificar dimensão das embalagens) têm habitualmente em casa por tipo de maionese?

G.2.8 -Qual é o conhecimento das mensagens de comunicação das marcas (Calvé, Hellmann's, Heinz, Paladin e Vianesa)?

G.3 : Comportamentos Pós-Consumo de Maionese

G.3.1 - Lembra-se de lhe terem contado experiências, a nível físico ou digital, de compra e/ou de consumo de produtos ou marcas de Maionese?

G.3.2 -Lembra-se de ter partilhado a experiência, a nível físico ou digital, de compra e/ou de consumo de produtos ou marcas de Maionese?

Annex B- Shadowing Script

SF.1: Compra de Ketchup

SF.1 - No último ano quantas vezes terá comprado Ketchup?

SF.1.1 – Se indicou nenhuma vez, perguntar, porquê?

No caso dos que responderam "**não compraram no último ano**" - Saltar para F.12

SF.2 – Ketchup de que variedades? (normal, com redução de açúcar, redução de sal, picante,…)

SF.3 - E que tipo de embalagem de Ketchup? (pequenas 250 grs, 500 grs e 700 grs)

SF.4 - O que o leva a voltar a comprar? (está a terminar stock em casa, aproveitar promoções, impacto da exposição na loja, ...)

SF.5 – Quando o produto que costuma comprar está em rutura o que faz? (adia a compra, muda o tipo de produto, muda de marca – para qual?)

SF.6 - Em relação a promoções neste tipo de produtos, que tipo tem aproveitado (desconto de preço, packs de produtos, cupões, outras?)

SF.7 - Como é que avalia a oferta de Ketchups? (oferta completa e bem exposta, faltam produtos - quais?)

SF.8 - Durante o confinamento quais foram as alterações nos hábitos de compra de Ketchup?

SF.9 -Quais os hábitos que se mantiveram após terminar o confinamento?

SF.10 – Está a usar Ketchup especialmente para que tipo de pratos? (carne, massas, batatas fritas, salsichas, outros,...)

SF.11 - Independentemente de questões de preço, qual a marca que prefere? Porquê?

SF.12 – As marcas principais de Ketchup que encontrou foram Calvé, Heinz, Pladin, e Marca de Distribuidor. Quais as associações (ideias que pensa quando pensa na marca) que faz a cada uma das marcas?

SF.13 – A sua escolha de compra recaiu em??? (marca e tipo de produto) - porquê essa opção de compra? (marca e tipo de produto)

SF.14 - Lembra-se de lhe terem contado experiências, a nível físico ou digital, de compra e/ou de consumo de produtos ou marcas de Ketchup?

SF.15 -Lembra-se de ter partilhado a experiência, a nível físico ou digital, de compra e/ou de consumo de produtos ou marcas de Ketchup?

SG.1 : Compra de Maionese

SG.1 - No último ano quantas vezes terá comprado Maionese?

SG.1.1 – Se indicou nenhuma vez, perguntar, porquê?

No caso dos que responderam “**não compraram no último ano**” - Saltar para G.12

SG.2 – Maionese de que variedades? (“normal”, magra/light, alho, ….)

SG.3 - E que tipo de embalagem de Maionese? (pequenas 250 grs, 450 grs e 700 grs)

SG.4 - O que o leva a voltar a comprar? (está a terminar stock em casa, aproveitar promoções, impacto da exposição na loja, ...)

SG.5 – Quando o produto que costuma comprar está em rutura o que faz? (adia a compra, muda o tipo de produto, muda de marca – para qual?)

SG.6 - Em relação a promoções neste tipo de produtos, que tipo tem aproveitado (desconto de preço, packs de produtos, cupões, outras?)

SG.7 - Como é que avalia a oferta de Maioneses? (oferta completa e bem exposta, faltam produtos - quais?)

SG.8 - Durante o confinamento quais foram as alterações nos hábitos de compra de Maionese?

SG.9 -Quais os hábitos que se mantiveram após terminar o confinamento?

SG.10 – Está a usar Maionese especialmente para que tipo de pratos? (peixe, marisco, saladas, outro prato - que tipo de pratos?)

SG.11 - Independentemente de questões de preço, qual a marca que prefere? Porquê?

SG.12 – As marcas principais que encontrou foram Calvé, Hellmann’s, Heinz, Paladin e Vianesa, MDD. Quais as associações (ideias que pensa quando pensa na marca) que faz a cada uma das marcas?

SG.13 – A sua escolha de compra recaiu em??? (marca e tipo de produto) - porquê essa opção de compra? (marca e tipo de produto)

SG.14 - Lembra-se de lhe terem contado experiências, a nível físico ou digital, de compra e/ou de consumo de produtos ou marcas de Maionese?

SG.15 -Lembra-se de ter partilhado a experiência, a nível físico ou digital, de compra e/ou de consumo de produtos ou marcas de Maionese?