



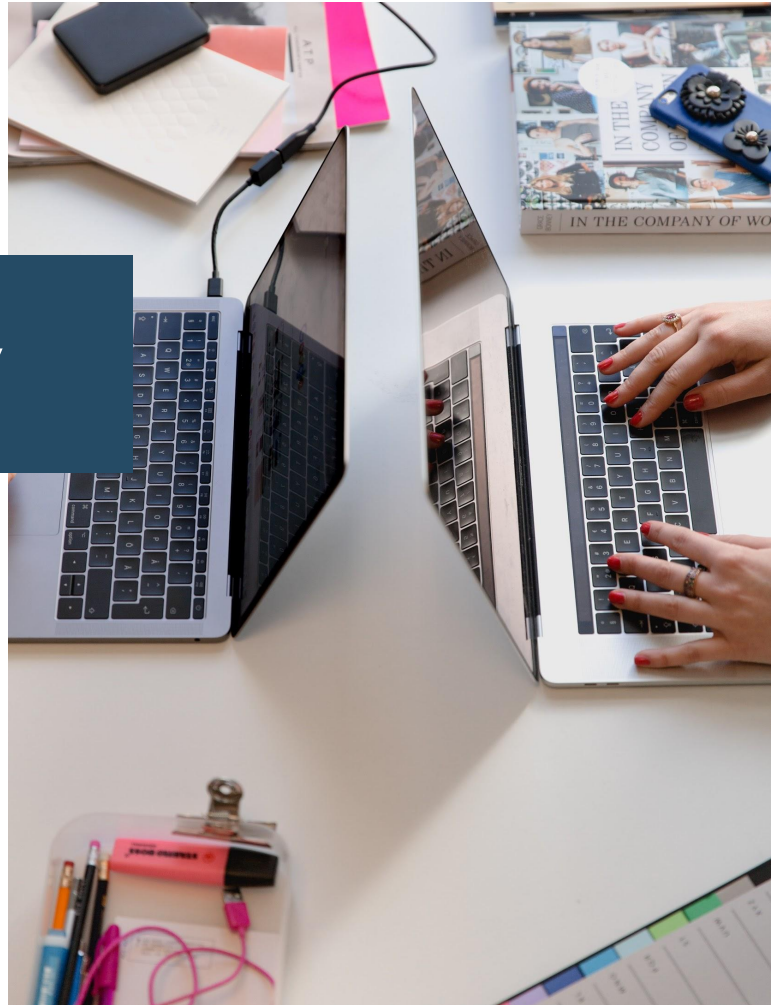
# Covid-19 assessment on omnichannel shopping behaviour



# Summary

- 1** Methodology
- 2** Global overview
- 3** Online
- 4** Grocery
- 5** Restaurants

# Methodology



# Methodology

> glossary, sample & period of analysis

## Period of analysis

jan, 6- march,  
16<sup>th</sup>

### Reference base period

Serves as a benchmark for future periods

monday  
march, 16<sup>th</sup>

### Lockdown - Week 1

France imposes a **nationwide lockdown** banning all public gatherings and asking people to stay indoors except for essential errands - starting on Tuesday, 17th at noon.

march, 23<sup>rd</sup>

### Lockdown - Week 2

March, 27th: France extends coronavirus lockdown until April,15th

march, 30<sup>th</sup>

### Lockdown - Week 3

april, 6<sup>th</sup>

### Lockdown - Week 4

april, 13<sup>th</sup>

### Lockdown - Week 5

april, 20<sup>th</sup>

### Lockdown - Week 6

april, 27<sup>th</sup>

### Lockdown - Week 7

may, 4<sup>th</sup>

### Lockdown - Week 8

may, 11<sup>th</sup>

### Week 9 - End of Lockdown

july, 6-12

### Week 17

july, 13-19

### Week 18

## Users sample

Based on anonymized and aggregated payment data from >10K active users in France, who made at least one purchase during the analysis period.

## KPIs glossary



Number of transactions  
(per consumer & per week)

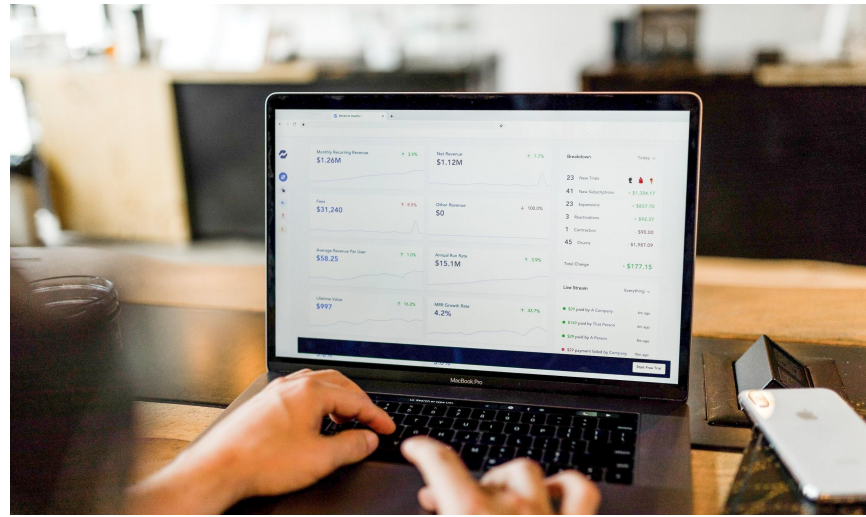


Overall budget spent  
(per consumer & per week)



Average spending basket  
(per purchase)

Base index 100 = reference based period from January 6th to March 16th based on a weekly average



# Global overview

# 2

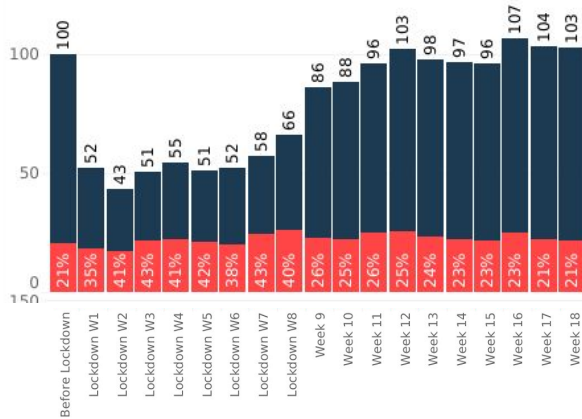
# Consumer Shopping Behaviour

Offline Online

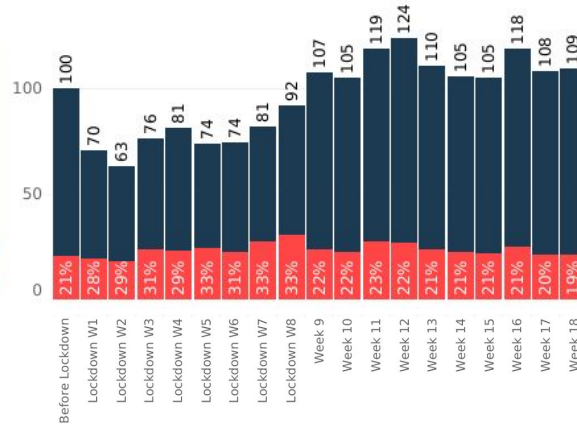
We can observe a steady increase since week 9 ( week following the end of the lockdown) in store purchases, the global budget spent is steadily returning to normal. The average basket has not stopped decreasing since the lockdown and should soon return to pre-lockdown figures.



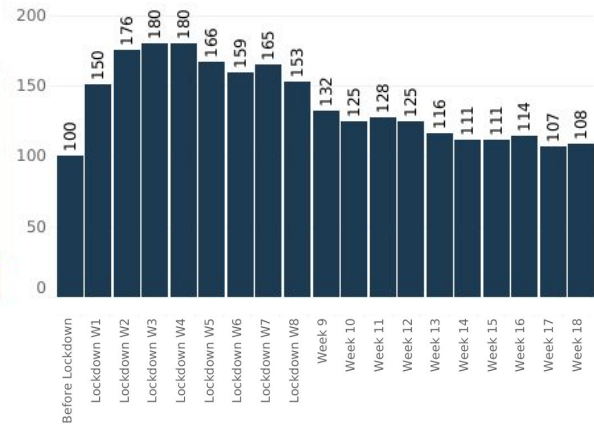
Number of transactions per consumer  
(base index 100)



Overall budget spent per consumer  
(base index 100)



Average spending basket  
(base index 100)



# Consumer Shopping Behaviour

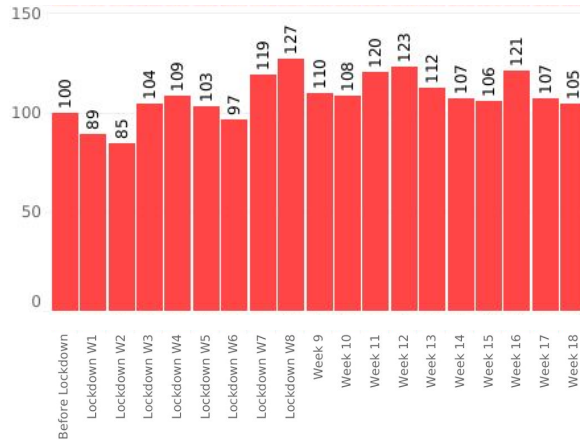
Offline Online

Regarding online purchases, after 12 weeks above average sales are steadily coming back to pre-lockdown figures.

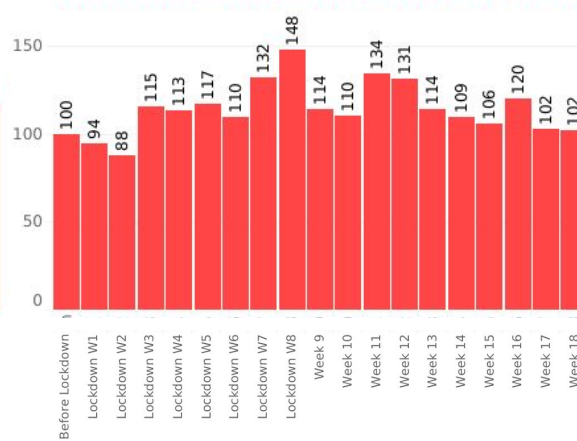
## > Global Online sales



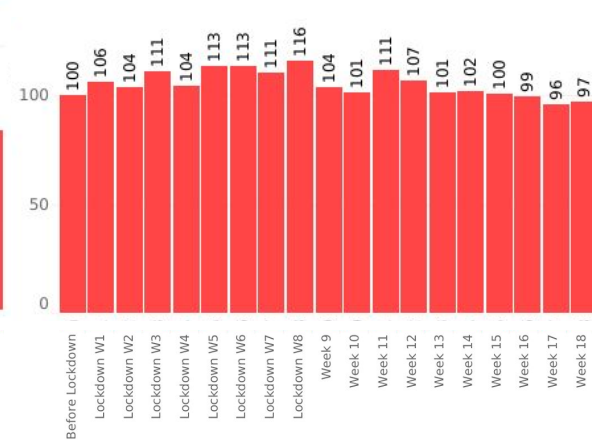
Number of transactions per consumer  
(base index 100)



Overall budget spent per consumer  
(base index 100)



Average spending basket  
(base index 100)





3

Online





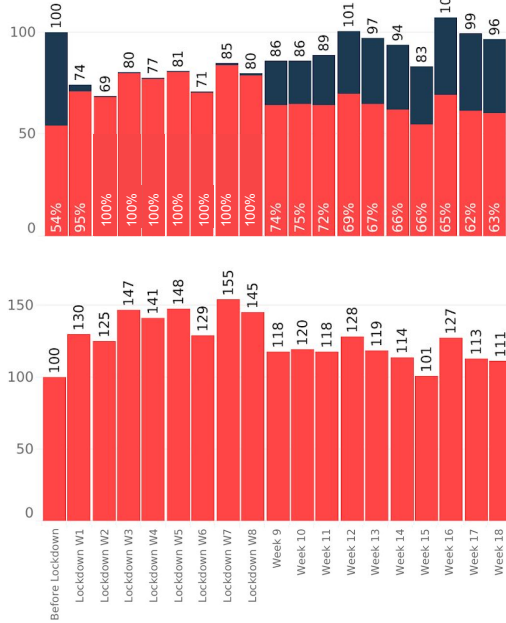
# Culture Multimedia Tech

Offline Online

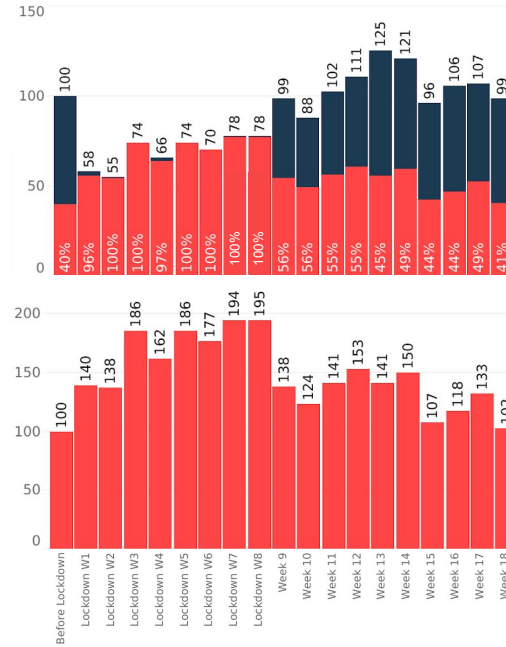
Noticeable boom online during and after lockdown with peaks in purchases. The global budget spent and the number of transaction online have been steadily returned to normal these last 3 weeks.



Number of transactions per consumer  
(base index 100)



Overall budget spent per consumer  
(base index 100)



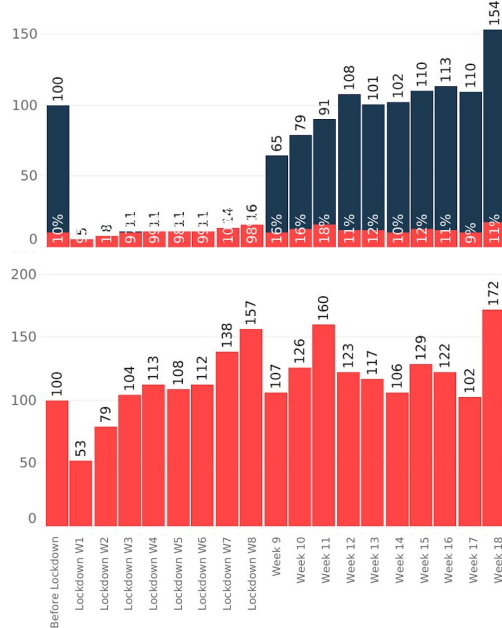
# Fashion

Offline Online

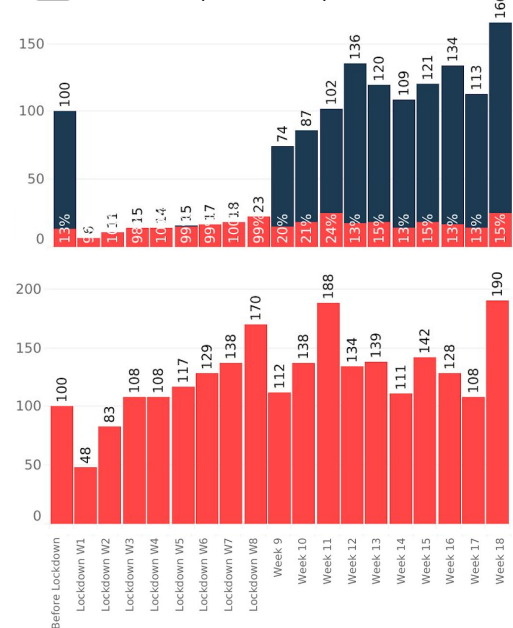
Online clothing purchases have increased at the end of the lockdown and especially the 2nd week following the end of the lockdown mainly because stores prevented to try on clothes for security measures. Consumers purchased a lot more online, which is linked to improved delivery services. Peak in Week 18 is link to the summer sales.



Number of transactions per consumer  
(base index 100)



Overall budget spent per consumer  
(base index 100)



# Online only

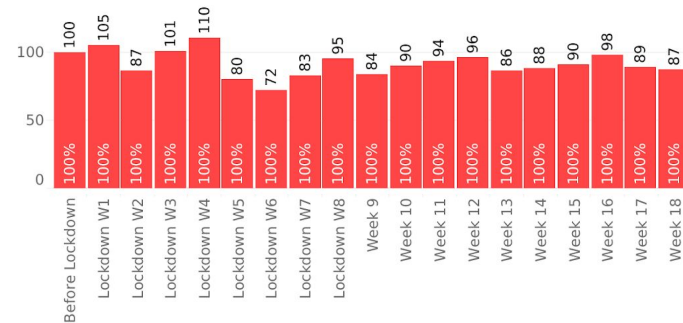
amazon

Regarding the number of transactions, despite overall assumptions, Amazon did not benefit from this crisis and remains 10% below its average. This remains true regarding overall budget spent, which has changed a little.

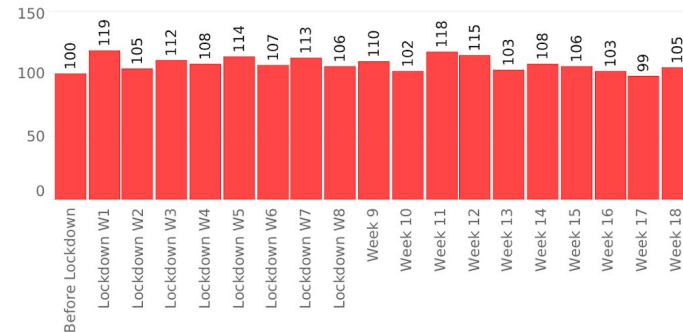
Online



Number of transactions per consumer  
(base index 100)



Overall budget spent per consumer  
(base index 100)

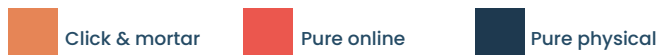


# Retailers information

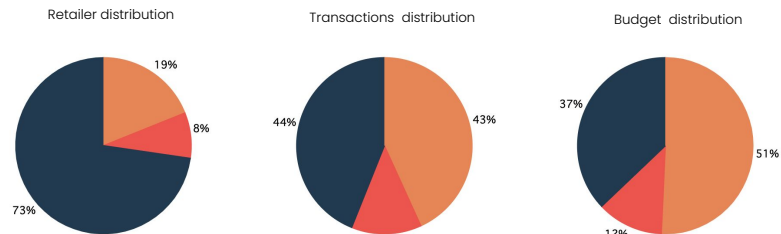
## > Distribution

We can observe during these three different time frames an increase of purchases in click & mortar stores and pure online during the lockdown (+33%), however we can also observe an increase in business activity of physical stores in phase 3.

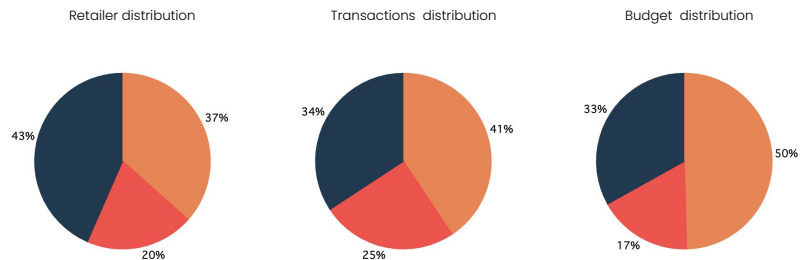
### Retailers type



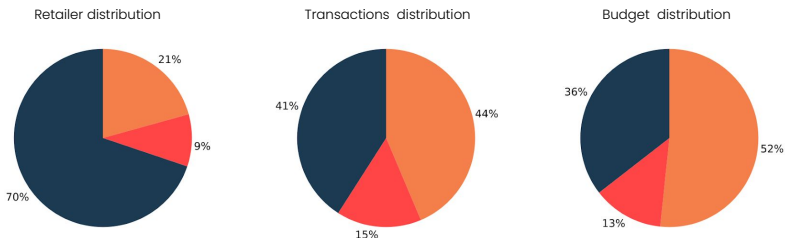
### Pre-Lockdown



### Lockdown



### Post-Lockdown



# Retailers information

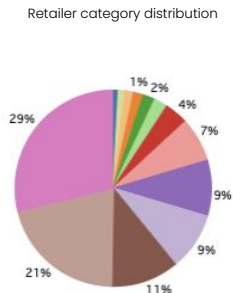
> Category

Huge increase in grocery expenses during the lockdown.

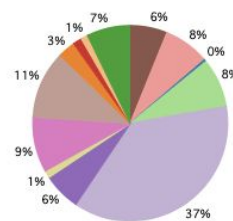
## Category



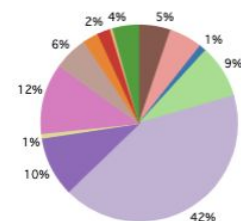
## Pre-Lockdown



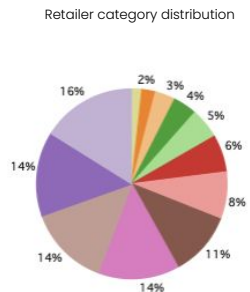
## Transactions per retailer category distribution



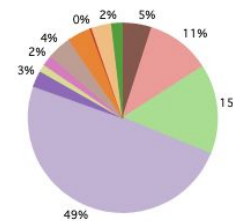
## Budget per retailer category distribution



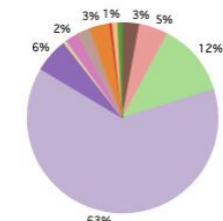
## Lockdown



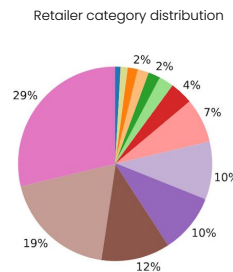
## Transactions per retailer category distribution



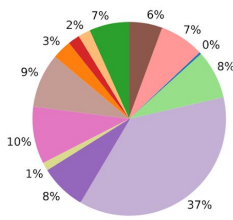
## Budget per retailer category distribution



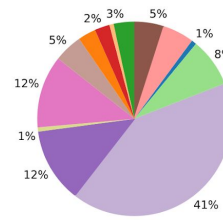
## Post-Lockdown



## Transactions per retailer category distribution



## Budget per retailer category distribution





# Grocery

# 4



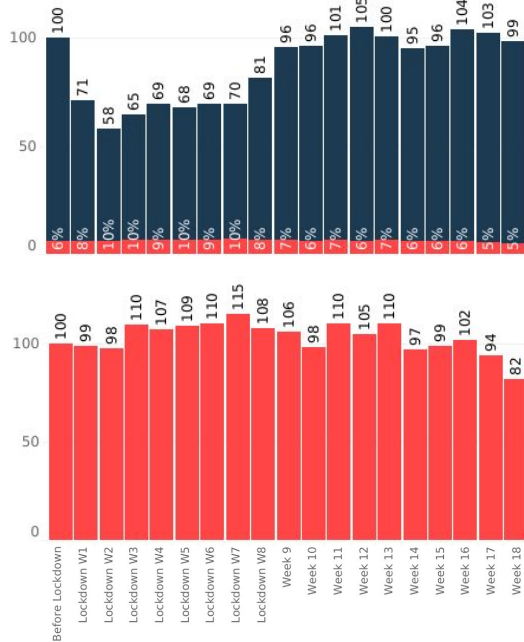
# Grocery

## > Hypermarkets

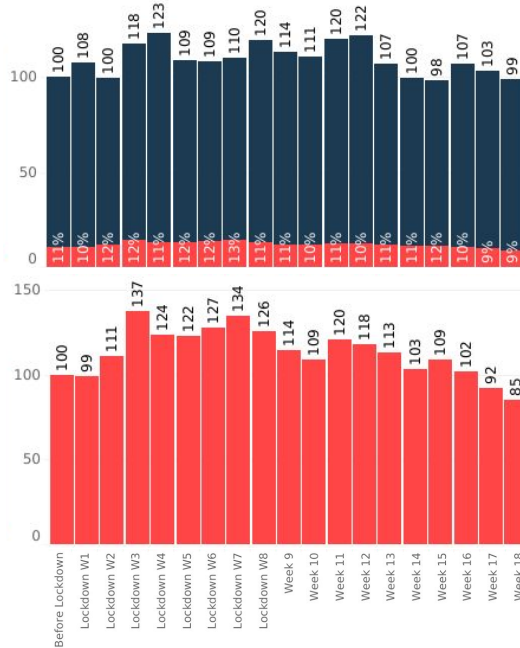
Offline Online

Hypermarkets also experienced a +90% average basket increase. Online purchases did not soar as high as expected. Global sales have now returned to normal.

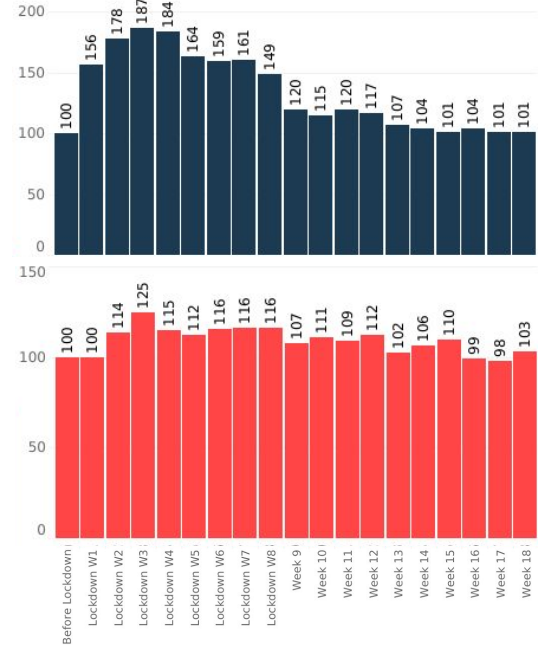
Number of transactions per consumer



Overall budget spent per consumer



Average spending basket



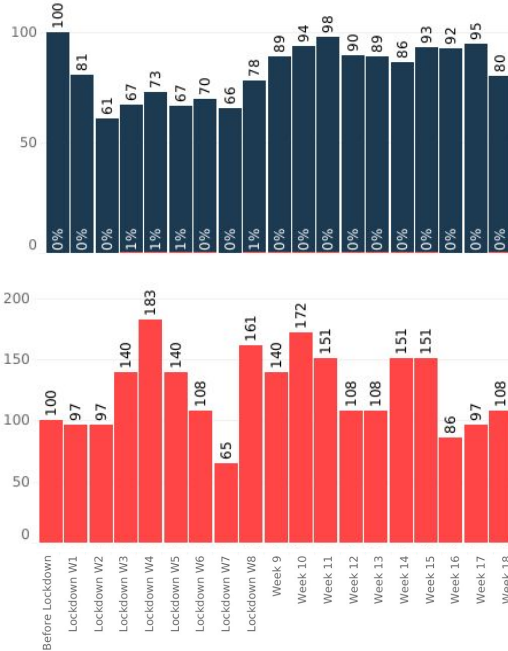
# Grocery

> City Supermarkets

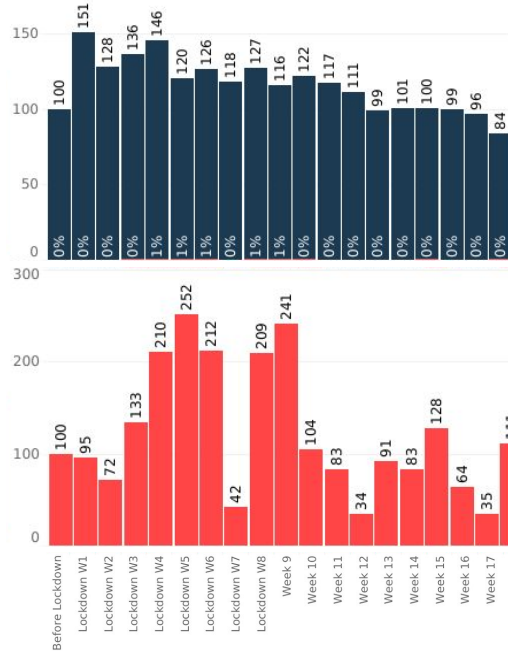
Offline Online

The average basket of nearby supermarket drastically increased during the lockdown, up to 110% increase of the average basket during the 2nd week of lockdown for instore purchases. We can also notice an increase on online budgets, most certainly to avoid going to the store.

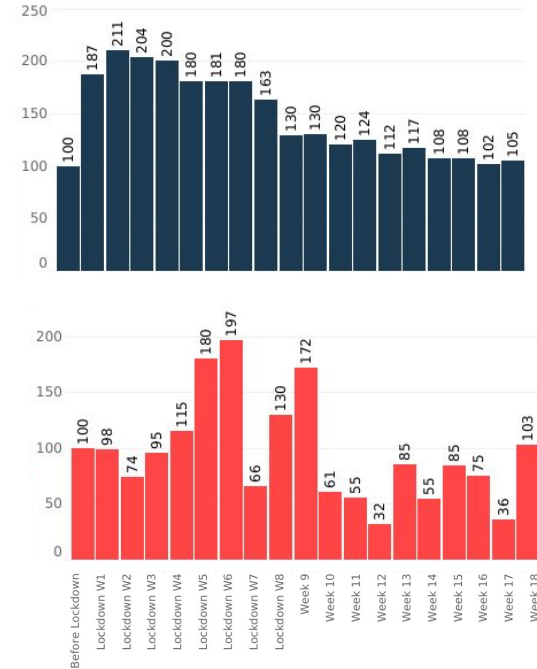
Number of transactions per consumer



Overall budget spent per consumer



Average spending basket







5

# Restaurants

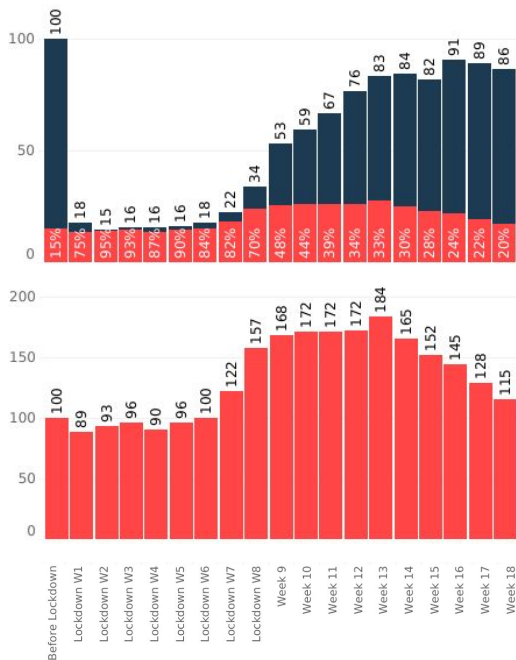
# Restaurants

> Bars, snacks, online food delivery

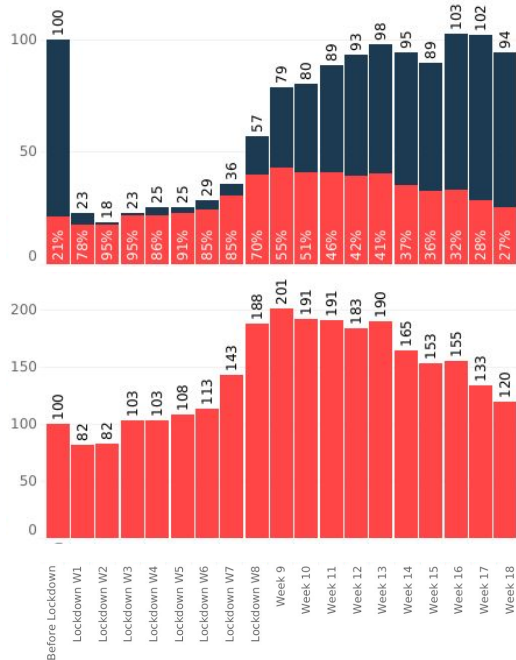
Offline Online

Restoration sector suffered greatly during the crisis and is struggling to return to a normal rhythm. Food Delivery has obviously benefited a lot from the crisis during the lockdown and continued on trends higher than normally in recent weeks

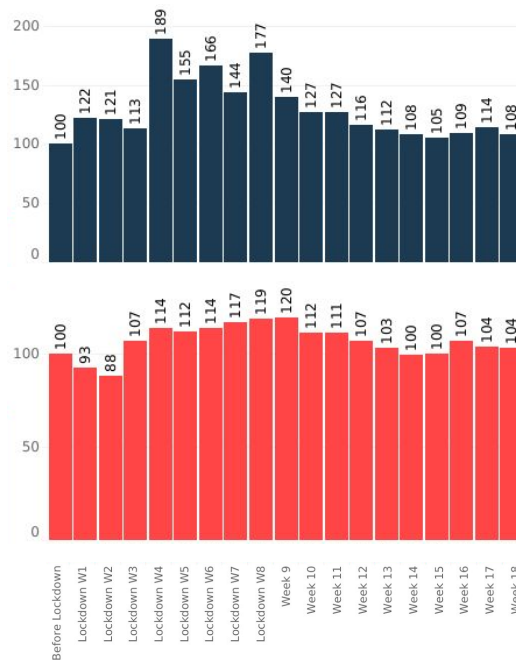
Number of transactions per consumer



Overall budget spent per consumer



Average spending basket





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*You will find in this white paper a sneak peek of the shopping analysis range we can offer, thanks to our omni-channel solution for retailers, based on payment data. Feel free to contact us for further analysis on any Retail category or personalised KPIs on your business*

## Transaction connect

**Transaction Connect** offers a technology to easily deploy a loyalty program rewarding customer purchases. No software integration or hardware deployment, we use the new technologies of open banking and machine learning to collect, analyze and enrich the purchasing data of the customers who accept it when registering for the loyalty program. The service is delivered as white-label technology and billed as a monthly license in SAAS mode. Customers enjoy a smooth, loyalty-free experience, and are rewarded for paying with their usual payment method. In addition, buying data analysis gives retailers and shopping centers valuable insights to improve their marketing and strategy.