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### THE CONSUMERS' BEHAVIOR AS A DRIVER OF RETAIL TRENDS

*Under the conditions of unprecedented wartime social and economic upheavals, restarting activities is considered not just as a factor in the development of modern trade enterprises, but as an indispensable condition for their survival in extreme reality. Adapting to new realities in the field of trade is possible only on the basis of understanding the changes taking place in Ukrainian society. The aim of the article is to identification of determinants of consumer behavior that generate key trends in retail development under wartime conditions. General scientific methods of analysis and synthesis, deduction and induction, logical generalization, systematization and comparison, SWOT analysis were used in the paper. The state of retail development under the conditions of martial law in Ukraine was studied in the context of modern threats and opportunities, strengths and weaknesses. In order to form an idea of modern retail trends, consumer behavior in retail was studied from various angles and a range of problems that concern the modern consumer were outlined. The characteristics of goods for which the buyer is ready to overpay and consumer priorities in favor of purchasing domestic goods have been identified. The methods of delivery of goods acceptable to buyers and the attitude of Ukrainians to new brands have been determined. A change in the emphasis of consumers in favor of cheaper goods, an increase in rationality in the purchase of goods and a shift*

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### ПОВЕДІНКА СПОЖИВАЧІВ ЯК ДРАЙВЕР РИТЕЙЛ- ТРЕНДІВ

*За умов безпрецедентних воєнних, соціальних і економічних потрясінь перезавантаження діяльності розглядається не просто як фактор розвитку сучасних підприємств торгівлі, а як неодмінна умова їх виживання в екстремальній реальності. Адаптуватися до нових реалій у сфері торгівлі можливо лише на підставі розуміння змін, які відбуваються в українському суспільстві. Метою статті є ідентифікація детермінант споживацької поведінки, які генерують ключові тренди розвитку ритейлу за умов воєнного часу. Використано загальнонаукові методи: аналізу та синтезу, дедукції та індукції, логічного узагальнення, систематизації та порівняння, SWOT-аналізу. Досліджено стан розвитку ритейлу за умов воєнного стану в Україні в контексті сучасних загроз та можливостей, сильних та слабких аспектів діяльності. Для формування уявлення про сучасні ритейл-тренди всебічно вивчено споживацьку поведінку в ритейлі та окреслено коло проблем, які турбують сучасного споживача. Ідентифіковано характеристики товарів, за які покупець готовий переплачувати кошти, та споживацькі пріоритети на користь придбання вітчизняних товарів. Визначено прийнятні для покупців способи доставки товарів і ставлення українців до нових брендів. Константовано зміну акцентів споживачів на користь дешевших товарів, збільшення раціональності у придбанні товарів та зміцнення споживацьких*



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*in consumer expectations from trade enterprises in the direction of socially responsible behavior were noted. The complex realities of war caused colossal damage to retail activity in Ukraine, but at the same time – opened a portal of opportunities for its transformation in the direction of awareness and consideration of modern determinants of consumer behavior, establishment of a constructive dialogue with the consumer and effective response to current market challenges*

*Keywords:* COVID-19 pandemic, martial law, consumer, consumer behavior, retail.

*очікувань від підприємств торгівлі в бік соціально-відповідальної поведінки. Встановлено, що складні воєнні реалії завдали колосальної шкоди діяльності ритейлу в Україні, але в той же час відкрили портал можливостей для його трансформації в напрямі усвідомлення і врахування сучасних детермінант споживацької поведінки, налагодження конструктивного діалогу зі споживачем та ефективного реагування на поточні виклики ринку.*

*Ключові слова:* пандемія COVID-19, воєнний стан, споживач, споживацька поведінка, ритейл.

**JEL Classification:** F19, I31, L29, L81.

## **Introduction**

The last few years have been extremely difficult for Ukrainian society and domestic business, which had to work in turbo mode. At first, Ukraine was shaken by the COVID-19 pandemic, and when the situation more or less stabilized, the Russian Federation began a full-scale invasion of Ukraine – a completely new and perhaps the most difficult challenge ever faced by our society and business.

However, during the pandemic and the great war, society gradually adapted to new challenges, new trends were formed in the consumer environment, Ukrainians got used to adjusting life in conditions of instability and living in stressful conditions, reviewing life values formed over the years and changing their established habits.

Today, Ukrainian retail has faced unprecedented temporary difficulties caused by Russian armed aggression. Observing the retail market during the war, we can note a sharp reduction in turnover, huge losses of enterprises and the destruction of their assets, relocation and closure of businesses, which led to a general deterioration of performance indicators. Under such conditions, the use of advanced technologies and awareness of new consumer trends is a step into the future of the retail sector in wartime, and later, postwar reality.

In different periods, foreign and domestic scientists were engaged in the diagnosis of consumer behavior. Thus, the works of foreign scientists H. Assael, L. G. Shifman, J. L. Wiesenblit, M. R. Solomon, M. Roberts-Lombard, B. S. Parumasur and many others mostly present theoretical aspects of consumer behavior [1–4]. Domestic scientists, such as M. Oklander, I. Zharska, Ya. Larina, A. Ryabchyk, describe the general features and types of consumer behavior [5; 6]. O. Balitska focuses on modeling consumer behavior as a means of substantiating the marketing strategies of enterprises [7]. Current trends in consumer behavior and consumption patterns in Ukrainian society are substantiated in the works of K. Bazherina, O. Yevtushchevska, S. Ilyashenko, O. Kovalchuk, I. Lorvi, O. Marushevska, V. Martsenyuk, O. Obud, and others. [8]. In previous studies, typical determinants of consumer behavior under the conditions of the COVID-19 pandemic were identified and

modern consumer trends in the process of purchasing goods during isolation and quarantine were determined [9; 10].

Despite the high value of the research of these scientists, their scientific output is aimed at the study of psychology, preferences and models of consumer behavior under peaceful conditions. However, the declaration of martial law in Ukraine in 2022 actualizes the need to study the psychology of the modern consumer and post-war changes in consumer priorities and attitudes, which determine the main trends in the modern development of retail trade enterprises.

The aim of the article is to identify determinants of consumer behavior that generate key trends in retail development under wartime conditions.

General scientific methods were used: analysis and synthesis, deduction and induction, logical generalization, systematization and comparison, SWOT analysis. Scientific publications of foreign and domestic researchers, open sources of information, the authors' own research and research by companies Deloitte, Gradus Research, GWI, Publicis Groupe Ukraine have been served as the information base of the research.

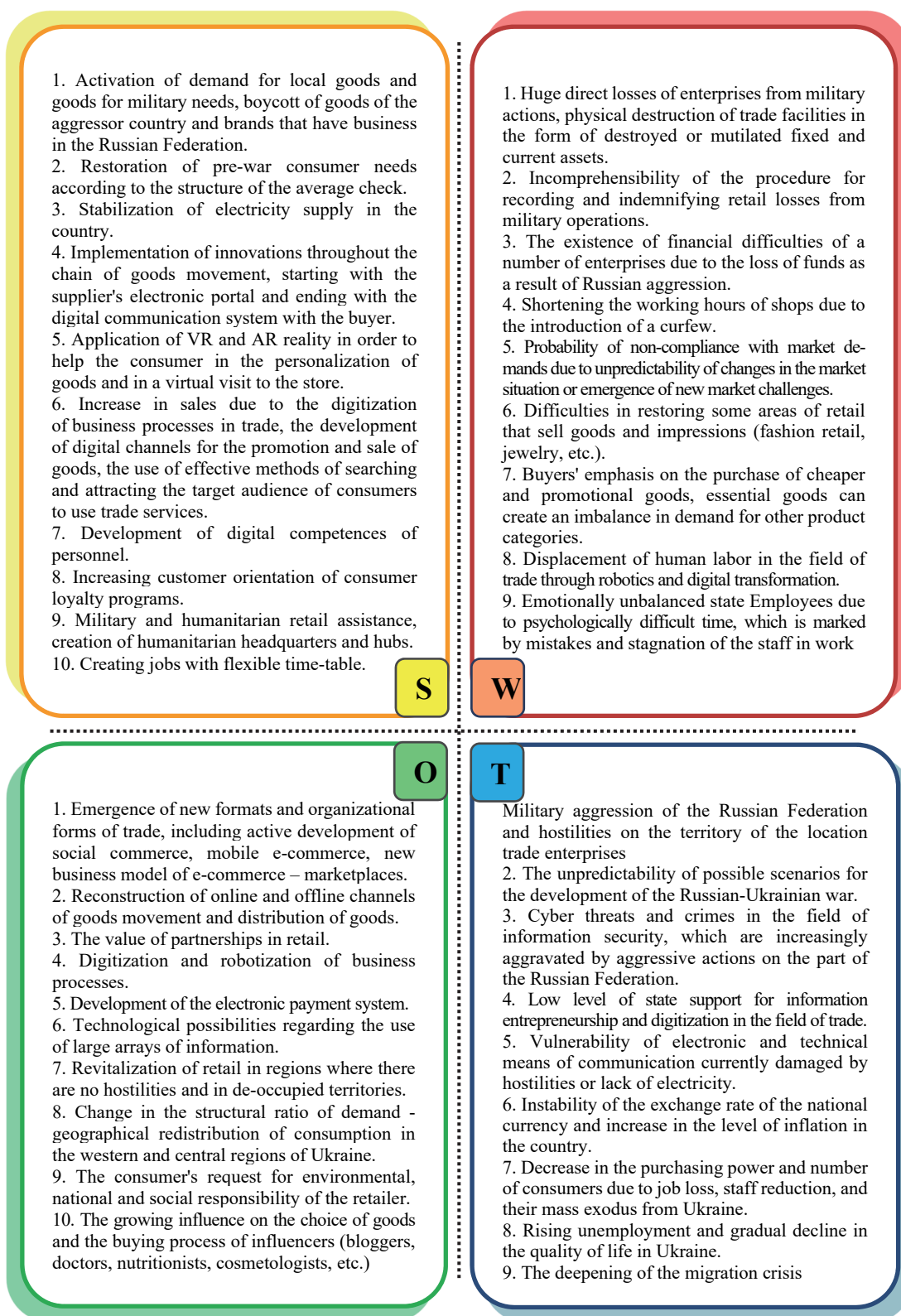
## **1. Retail development under martial law**

The war made adjustments to all spheres of activity and life of Ukrainians, and of course, it affected the sphere of trade. At the same time, the difficult military conditions in which Ukrainian retail has been developing lately, lay the possibility of rebooting trade enterprises by modernizing outdated technologies and supply chains, optimizing the inventory management system, revising the principles of pricing, and increasing customer-oriented activities.

During the year of the war, trade enterprises adapted and implemented innovative solutions in order not just to stay afloat, but to successfully work and develop despite everything. Using the SWOT analysis technique, the risks, threats (T) and opportunities (O) of the market environment in which military retail operates are analyzed, as well as the strong (S) and weak (W) aspects that the retail trade sector exhibits under current conditions (*Figure 1*).

Today, modern retail is experiencing difficult times, which has to satisfy consumer demand for goods and services 24 hours a day under the conditions of aggressive armed behavior of the Russian invaders. However, some retailers have made a strategic decision to fulfill their duty to consumers in the front-line territories: thus, in Donbass, only EKO Market (LLC "Eko") stores remain among the large retailers, whose management deliberately took risks to prevent a humanitarian crisis in the region.

Moreover, due to the occupation of a number of Ukrainian enterprises and the ban on the goods of Belarusian and Russian manufacturers at the beginning of the war, there was a shortage of fish products, rock salt, sausage gastronomy, cheeses, seasonings, vintage and collectible cognacs, wines, etc. in stores. The current domestic market is already saturated with goods of everyday demand, while part of the imports has been replaced by goods of local production [11, p. 208].



*Figure 1. Key characteristics of the SWOT analysis matrix regarding the development of retail under the conditions of martial law*

*Source:* constructed by the authors based on [11–13].

Today, the situation is complicated by the fact that the war is not limited to combat actions at the front: a separate danger is the information war, which began even before the beginning of the full-scale invasion of the Russian Federation in Ukraine, and later acquired unprecedented aggressive forms and consequences. A big threat is the spread of spam, phishing and virus programs, unauthorized access to information resources, interception and theft of information from servers [14, p. 130]. In addition, in retail there is a risk of leakage of confidential information, launch of software viruses and fraud due to cyber-attacks. Digitization and robotization of trade has actualized the problem of protecting electronic signatures, payments, tokens, SIM cards, online services, protecting information in electronic clouds, developing cryptography and personal authentication technologies, protecting electronic document management systems and servers, etc. [12, p. 65]. The problem is aggravated by the fact that today the country is only laying the foundation for state support for cyber protection and digitalization in the field of trade, and information provision is complicated by interruptions in the supply of electricity due to continuous attacks by the aggressor.

According to the report of the Ukrainian Center for Health Protection, the war also caused an unprecedented migration crisis and large-scale population movements within the country: as of the end of 2022, the population of Ukraine was about 31.4 million people, of which 1.15 million people live in the territories temporarily occupied by Russia, captured after the start of the invasion [15]. From February 24, 2022, about 13 million Ukrainians are forced to leave their homes. As of March 2023, about 5 million internally displaced persons were registered in Ukraine. And the number of unregistered migrants reaches 7 million [16]. Of course, population migration within Ukraine changed the geography of demand with an emphasis on the western and central regions of the country.

In addition, the economic environment of retail operation remains difficult today. Against the background of a certain slowdown in the rate of inflation in the country from 24.9% in February to 21.3% in March 2023, the purchasing power of the Ukrainian consumer promises to be better: the migration of a third of the population abroad, mobilization, the loss of work by some Ukrainians, an increase in the unemployment rate to 26% add an optimistic mood [17; 18].

One cannot ignore the significant arsenal of current opportunities for the development of modern retail. Even before the start of the full-scale invasion of Russia, the sphere of trade was experiencing a boom in its development, provoked by the COVID-19 pandemic. It is about the active development of offline and online trade, including social commerce, mobile e-commerce, and marketplaces. The main reasons for the modern popularity of the latter are providing consumers with access to a wide range of goods with the condition of fast delivery of orders. Such a business model of e-commerce is also beneficial to the seller, because it has an extensive coverage area [19, p. 25–26].

Since a large number of commodity movement schemes were broken in the very first days of the occupation of the Russian Federation, in order to survive in extreme conditions, trade enterprises had to quickly reformat established work models and look for alternative sources of supply.

The difficult wartime significantly strengthened the existing partnership relations for the restoration of full-fledged retail operations. For example, in order to better satisfy consumer demand, in collaboration with the myMeest service, Ukrainian retailers managed to organize the delivery of Zara, H&M, Bershka, Massimo Dutti and many other brands from online stores in Europe and the USA to Ukraine, which left the domestic market in 2022 due to the war [20].

Today, there is a revival of retail trade in regions where there are no hostilities and which returned to Ukraine after de-occupation. At the same time, it is necessary to state the change in the structural ratio of demand, which occurred due to the military aggression of the Russian Federation, namely: the geographical redistribution of consumption to the western regions of Ukraine, a noticeable emphasis on the purchase of cheaper and promotional goods, basic necessities [11, p. 208]. Thanks to the government grant program "eRobota", entrepreneurs were able to move their businesses to safe regions as part of the relocation program. According to information from the Ministry of Economy of Ukraine, as of February 2023, 791 enterprises have been relocated, 617 of which are already working at their new location [21]. Also, first the pandemic reality, and later the military one, turned retail into a branch of work with a flexible, remote or mixed schedule for a large list of employees: online sales managers, online store sellers, content managers, copywriters, RRS specialists, SEO specialists, business analysts, etc.

It is important that against the backdrop of Russian armed aggression, there was a clear patriotic self-identification in society towards the support of domestic goods and manufacturers and the unacceptability of everything associated with the country of the aggressor. There is also the transition of society to more conscious consumption and reducing the impact on the environment, the growing influence on the choice of goods and the purchase process of a large team of influencers, which create a fertile ground for social trends and consumer priorities.

Even in difficult military conditions, retail has certain advantages. For example, there is a tendency for consumers to return to the pre-war level of demand, as evidenced by the results of studying the composition of the average check: the most popular products today are water, salt, sugar, buckwheat, pasta, bread, butter, sour cream, milk, chicken, eggs, bananas [22].

An important trend today is the digitization and robotization of business processes in retail, which have somewhat stopped due to the intensification of military operations in Ukraine. However, a large number of enterprises find resources and continue the path of digital transformation throughout the chain of goods movement, starting with the electronic platform "Supplier Portal" and ending with a system of digital communications with

the buyer (Chabot, ChatGPT, bellbots, messengers). Retailers launch mobile applications and constantly improve their functionality in order to bring comprehensive information to consumers. Artificial intelligence helps to personalize products, increase the relevance of personal offers, and ensure sales growth. Today, the use of augmented reality is becoming more accessible and retailers can more actively implement it in their activities, and consumers can improve the use of e-commerce and make the right choice of products. For example, the IKEA Company uses AR-solutions in its application, where you can simulate a furniture project in an apartment.

According to the study by the Association of Retailers of Ukraine and the Ukrainian Council of Shopping Centers the cumulative losses of retail trade enterprises from the war exceeded UAH 50 billion, more than 40% of which fell on core assets in June 2022. Each retail chain lost an average of 10 stores. 60% of the amount of losses from military actions falls precisely on the sphere of food retail, the total losses of which are about UAH 30 billion. Turnovers of FMCG operators fell by half in just two months of the war, in the service sector – by 94%, jewelry trade – by 89%, fashion retail – by 83%, electronics and household appliances – by 74% [23]. At the same time, retailers faced the problem of the lack of a clear procedure for recording and compensating direct losses from military actions: what exactly and how should be recorded, how to record property damage in temporarily occupied territories, in what form to expect compensation, etc.

Despite the difficulties, the recovery of the retail sector continues: activity has been restored the fastest in those segments in which the greatest demand is felt – pharmacies and food retail. Those trade establishments that offer the consumer not so much goods as emotions and impressions (for example, fashion retail, jewelry sector) are recovering the worst. In other sectors, a gradual recovery of work is recorded, but at a less intensive pace [11, p. 209].

Despite the colossal losses from military operations, retailers are actively involved in military and humanitarian aid, in the creation of headquarters and hubs that help displaced persons from temporarily occupied territories, volunteers and all those in need of help in difficult wartime. At the same time, mobile applications and chatbots have an option of assistance to the armed forces, which allows you to donate points from the loyalty card to support the army, then convert them into cash and transfer them to help the defenders. It has also become a good tradition for retailers to create unbreakable points in stores during long power outages.

## **2. Key problems and the "military" portrait of the consumer**

In order to form an idea of modern retail trends, a study of consumer behavior in military retail was conducted in the form of an online survey with the general population of the study – 200 consumers aged 18+ and of different geographies located in the territory controlled by Ukraine. *Figure 2* summarizes the portrait of consumers who participated in the survey.



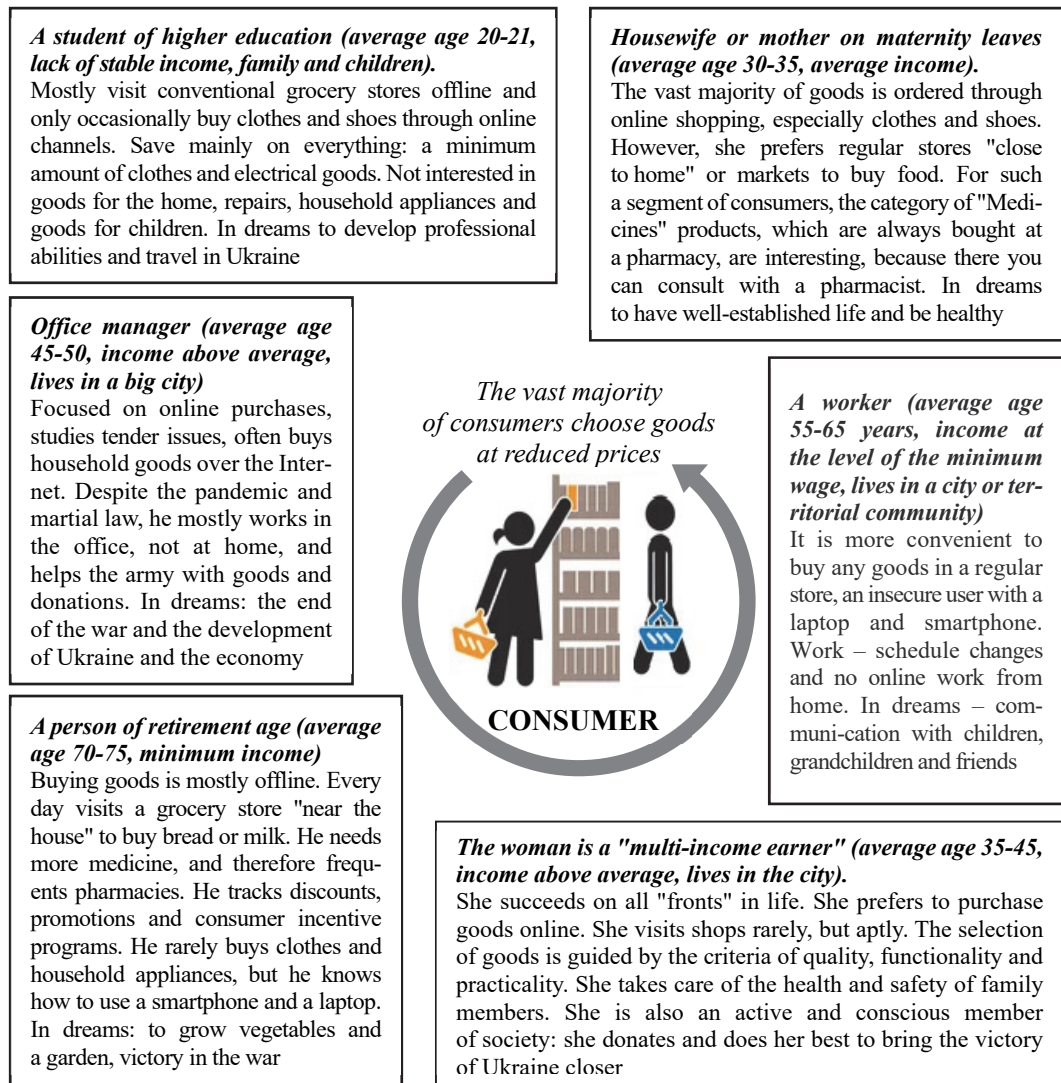


Figure 2. Visualization of the portrait of the consumer in the conditions of martial law in Ukraine

Source: developed based on survey data in March 2023.

Against the background of a full-scale war in Ukraine, the problem of the COVID-19 pandemic naturally receded into the background and gave way to more pressing challenges, as evidenced by the data in Figure 3.

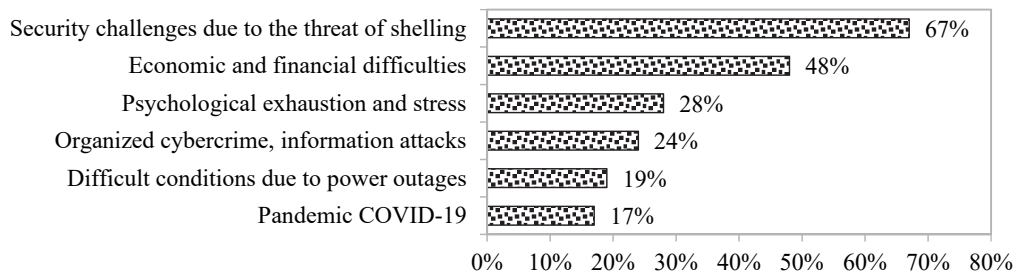


Figure 3. Ranking of the key problems of Ukrainian consumers in 2023

Source: calculated based on survey data in March 2023.



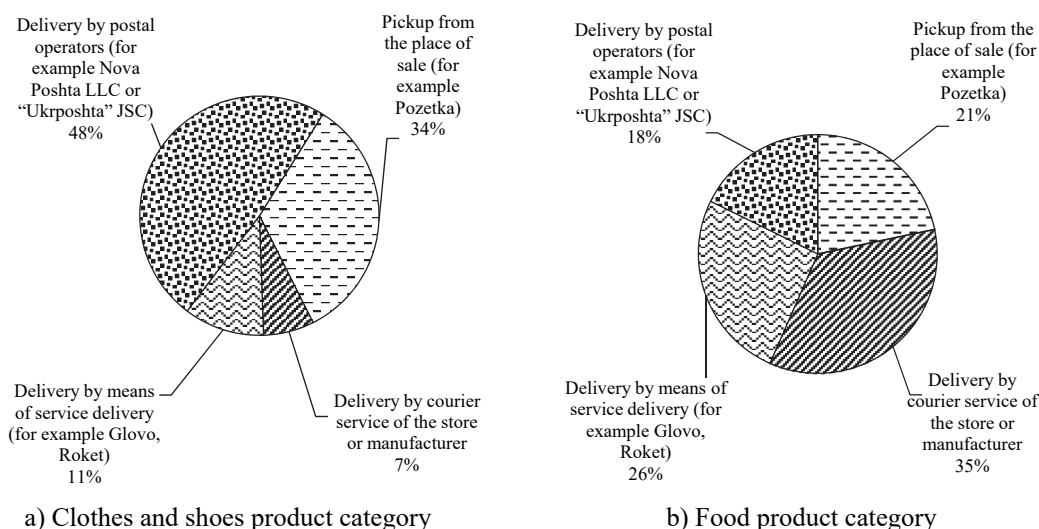
Among the urgent problems of modern consumers, the challenges generated by Russian aggression are at the forefront: ensuring their own physical security, economic and psychological adaptation to the new reality, cyber security in a complex information space against the background of an aggressive information war on the part of the Russian Federation, the problem of establishing life in conditions of power outages.

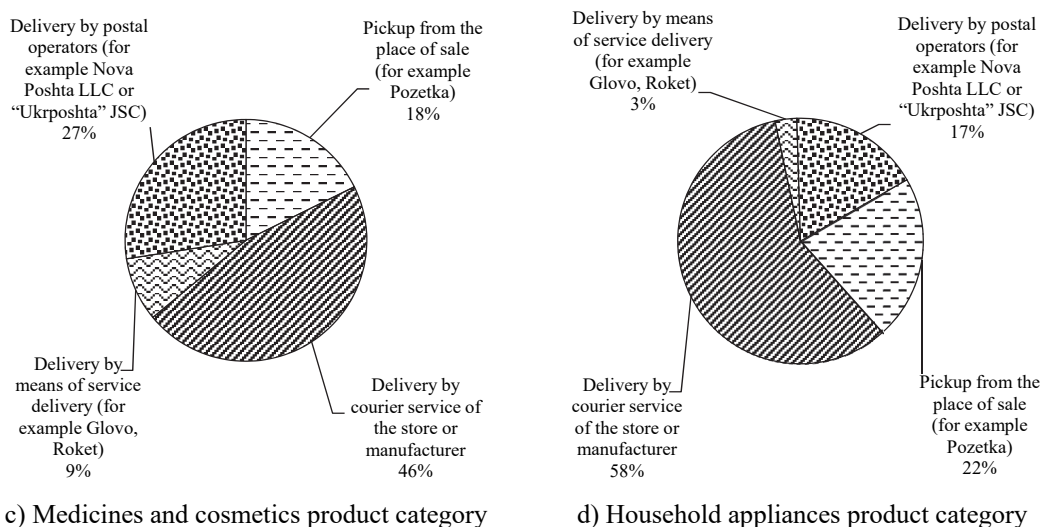
So, under the conditions of martial law, there was a shift in the ranking of Ukrainians' problems: the COVID-19 pandemic is no longer considered a priority.

Retail continues to work on leveling pandemic risks for buyers: stores without cash registers and salespeople are being tested; self-service cash registers, mailboxes for omnichannel sales, etc. are actively used [24]. However, currently consumers are not focused on excessive measures to counter the spread of the coronavirus, as disinfection of baskets, availability of medical masks, use of antiseptics, ventilation of premises, individual packaging of products and observance of social distance have long become commonplace. Moreover, the number of consumers who buy online is constantly growing.

### 3. Consumer priorities under martial law

In the conditions of a pandemic and war, online ordering and delivery have become an integral part of consumers' lives (*Figure 4*). The greatest variety of delivery methods is demonstrated by consumers in the "Food products" product category. In most categories, address delivery of goods by the courier service of a store or manufacturer prevails, the popularity of which is explained by the speed and ability to protect the consumer from wartime threats by delivering the goods directly to their hands and to a convenient place. On the other hand, in the clothing and footwear category, consumers prefer delivery by postal operators (almost half of the surveyed respondents).

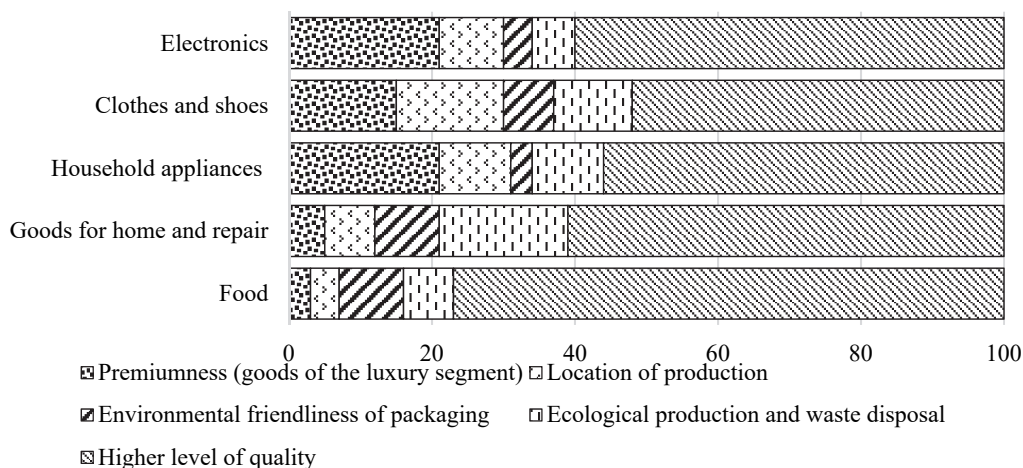




*Figure 4. Distribution of consumers by priority delivery methods, %*

Source: calculated based on survey data in March 2023.

Despite the fact that during the war, buyers became less sensitive to the quality of goods and services due to changes in life circumstances, values and priorities, the survey revealed that the vast majority of them are ready to pay extra for higher quality goods in all product categories, especially have a long shelf life. It is also determined that even in crisis situations, Ukrainian consumers are ready for price increases in the "Food Products" category, because they belong to primary consumer goods (*Figure 5*).



*Figure 5. Characteristics of goods for which consumers are willing to pay extra (by main product categories), %*

Source: calculated based on survey data in March 2023.

One of the modern global trends is the bet on environmental friendliness, but, unlike Europeans, in Ukraine this behavior is still characteristic of mostly young consumers. However, buyers are increasingly analyzing the ecological content of products or packaging, rather than trusting brands' advertising about their measures to protect the environment.

According to a study by the Gradus Research Company about the attitude of Ukrainians to brands during wartime, there is a commitment to support domestic manufacturers and a change in emphasis in favor of cheaper goods (Figure 6).

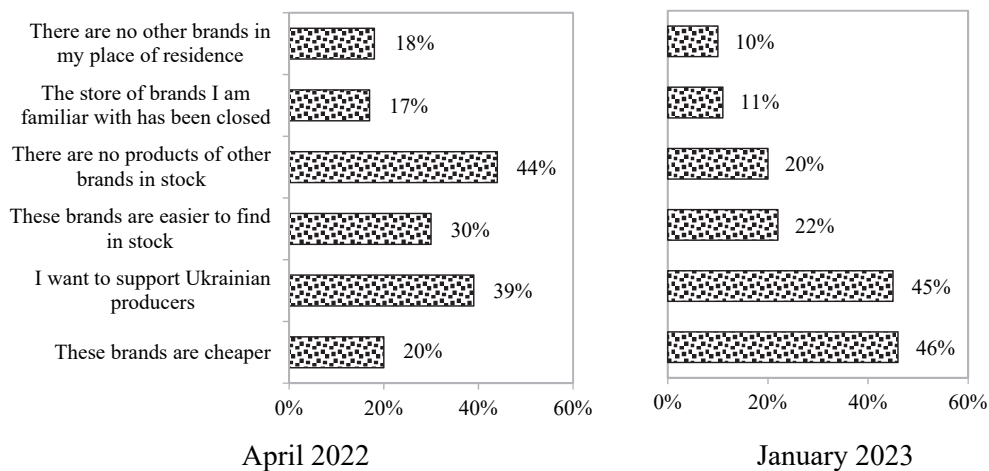


Figure 6. Motivation of Ukrainian consumers to purchase goods of new brands

Source: compiled by the authors according to [26].

In order to support the national economy and demonstrate patriotism in Ukrainian society, the trend of crazy demand for Made in Ukraine brands is clearly visible, which confirms its growth during the year of the war to the level of 45%.

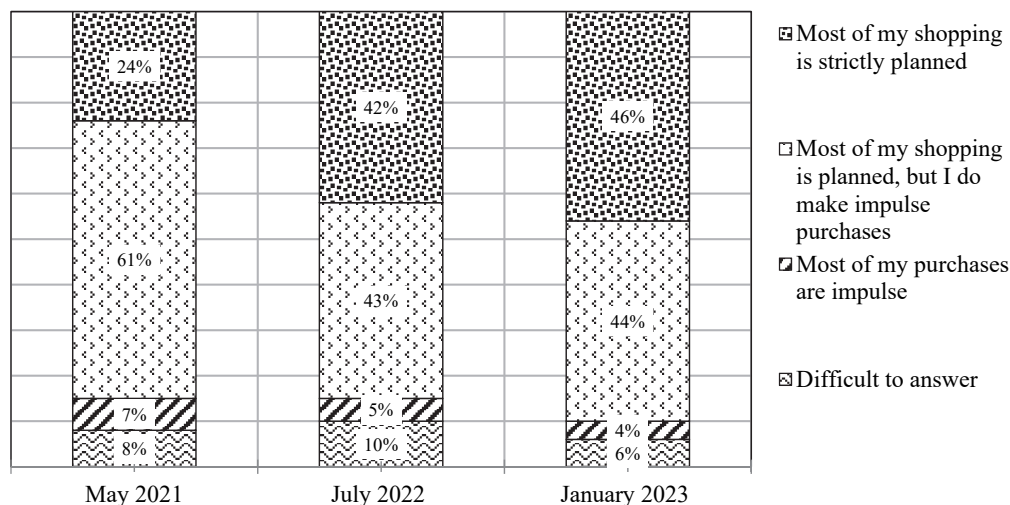
At the same time, the attitude towards brands that continue to work in Russia is deteriorating. This was declared by the vast majority of Ukrainians from the beginning of the full-scale invasion (78%). The share of those who completely or partially refused to buy such brands increased to 74% from May 2022. People "vote with their wallet" and are ready to support brands whose position corresponds to their beliefs [25].

In addition, an important modern trend in the purchase of goods is to reduce the volume of purchases and search for cheaper brands. During the year of the war, this motive for the purchase of goods increased more than twice and, accordingly, accounts for 46% of consumers.

#### 4. Strengthening rational motives in purchasing goods

Due to the Russian invasion in 2022, the poverty level in Ukraine increased by 18.7% and reached 24.2%, as a result of which more than 7 million Ukrainians are now below the poverty line [26]. A large number of Ukrainians faced "sudden poverty" due to wage cuts and job losses, especially in the war zone: a third of residents do not have enough money to pay their salaries every month, 14% of consumers say that they spend more than 60% of their monthly budget on food, and a quarter Ukrainians spend up to 60% of their budget on food. In contrast to Ukrainians, the British and Americans

spend only 6–7% of their budget on food [27]. Military circumstances push consumers to increase rationality in the purchase of goods, which is also confirmed by the study of the Gradus Research company (*Figure 7*).

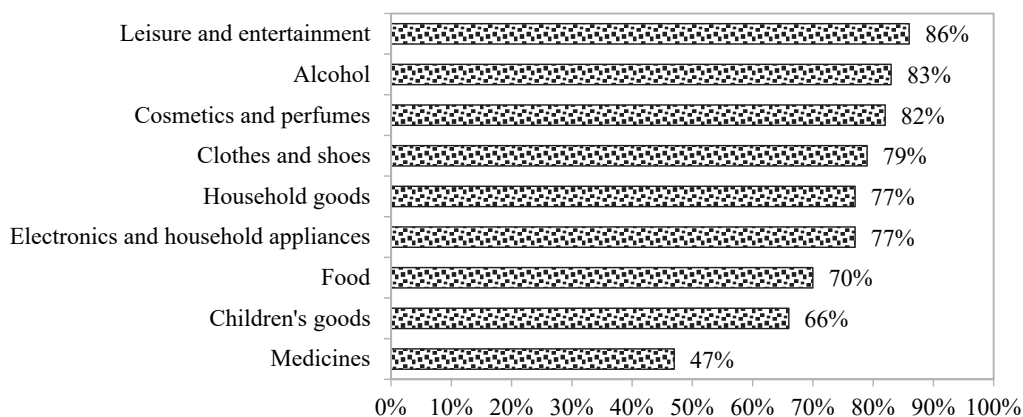


*Figure 7.* Change in the rationality of purchases by Ukrainian consumers

*Source:* compiled by the authors according to [25].

Compared to the peacetime period, during the war there is a clear trend towards an increase in rational motives in the shopping of Ukrainians. They tend to plan their purchases in advance, need to save and spend wisely. Also an interesting point is the change in consumer behavior in favor of economic volumes of purchases, which, among other things, is connected with the blackouts experienced by Ukrainians, when only that product was clearly purchased and in the amount that can be prepared in the near future, without "hope for a refrigerator".

According to a Deloitte company study, depending on the product category, 47% to 86% of consumers are inclined to save, and to a lesser extent they save on medicines, children’s goods and food products [28] (*Figure 8*).



*Figure 8.* Product categories on which consumers save during wartime

*Source:* compiled by the authors according to [28].

### 5. Consumer expectations during wartime

New Ukrainian realities have shifted consumer emphasis from the functionality of the product to the activities of trade enterprises and the perception of brands associated with them. Therefore, the study of consumer expectations from brands, which was conducted by GWI and Publicis Groupe Ukraine (*Figure 9*), is of interest.



Figure 9. Actual wishes of consumers to brands

Source: compiled by the authors according to [29].

In the conditions of countering Russian armed aggression, when Ukrainians lack support and empathy, consumers seek to establish a very careful, delicate dialogue with brands (62.5% of respondents), they once again show their support for those Ukrainian and international companies that boycotted the Russian market (almost 61% ), who take care of the needs of the Armed Forces and refugees, engage in volunteer activities (49.1%) and openly speak out against the war in Ukraine (46.7%). Also, 43% of consumers are interested in brands that demonstrate socially responsible behavior and are not aloof from the events taking place in Ukraine, helping front-line fighters, forced migrants and all Ukrainians in need.

### Conclusions

Today, business and the army act as a united front, thanks to which the victory of Ukraine is achieved. However, the war changed Ukrainian retail forever, causing unprecedented losses, physical destruction, and destruction of fixed and circulating assets from Russian war crimes. On the other hand, the retail sector passed the point of no return and was able to adapt to the challenges of war, receiving the impetus for transformation through the activation of new organizational forms of trade, including marketplaces, social commerce, mobile e-commerce, through the restructuring of online and offline channels of goods movement, through digitalization and robotization of activities and strengthening of existing partnerships.

So, the extreme military reality created a functional platform for rethinking the tried-and-tested retail business processes and forming new retail trends in response to current consumer sentiments and taking into account the modern determinants of their purchasing behavior.

It was determined that today the structural ratio of demand has undergone changes, as well as a radical revision of the needs and priorities of consumers. Since Ukrainians have become hostages of an economically and emotionally complex war situation, now they are more concerned about security issues, economic and socio-psychological problems and less about the problem of the incidence of COVID-19. Against the background of the gradual recovery of retail and purchasing activity, among the modern determinants of consumer behavior, a tendency to shift behavioral priorities towards rationality, pragmatism, economic volumes of purchases and in favor of cheaper goods was revealed. At the same time, buyers are willing to pay extra for higher quality goods in all categories, especially goods with a long shelf life, and are less inclined to save in such product categories as medicine, baby products and food. As in the pre-war period, consumers are indifferent to online channels for purchasing goods. It was found that for most product categories, they prefer address delivery of goods by courier service due to the desire to protect themselves from the risks of wartime.

It was also established that thanks to the clear patriotic self-identification of Ukrainians during the great war, there was a demand in society for the national responsibility of retailers, there was a shift in consumer emphasis on local goods and goods for military needs, there was a clear trend of boycotting the goods of the aggressor country and businesses that do not left the Russian Federation as a sign of protest against the war, as well as the growing influence on the choice of goods and stores of influencers perceived by consumers as trendsetters in the industry. In addition, in complex military realities, an important vector of retail development in the direction of meeting the expectations of the majority of consumers should be the socially responsible behavior of retailers and their construction of empathetic and delicate personalized communications with customers.

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