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MİGROS  
TİCARET A.Ş.



Healthier  
Lives

# FORESEING TOMORROW: 12 TRENDS THAT WILL SHAPE THE NEW NORMAL

MİGROS TİCARET A.Ş. and NIELSEN APRIL 2020 RESEARCH:  
POST COVID NEW NORMAL CONSUMER TRENDS

# 12 TRENDS THAT WILL SHAPE THE NEW NORMAL

1



SURROUNDED  
ON THREE SIDES

2



VALUES  
RESHUFFLED

3



FROM «ME»  
TO «US»

4



TIME TO TAKE A  
BREATH

5



CRAVING FOR  
SIMPLICITY

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HYGIENE360

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SOCIAL EQUALITY:  
TRUE OR FALSE?

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YOU'D BETTER  
SHAPE UP

12



RAINY DAY FUND

# 12 TRENDS

# THAT'LL SHAPE THE NEW NORMAL

# 1 SURROUNDED ON THREE SIDES

Consumers will come out of this period a little vulnerable, anxious but full of renewed hope.



Impact on Shoppers'

## PSYCHOLOGY

### Feeling Stuck at Home

- ✓ Anxiety
- ✓ Fear
- ✓ Uncertainty
- ✓ Feeling under threat
- ✓ Despair

## PHYSIOLOGY

### Symptom Mimics

- ✓ Virus symptoms
- ✓ Bodily tension
- ✓ Muscle pains
- ✓ Sleep disorder

## SOCIOLOGY

### Relationships on test

- ✓ Understand /appreciate the value of one another
- ✓ Tensions in the family

## POST-COVID IMPLICATIONS

- ✓ A shopper who is a little restless, concerned but full of hope and gratitude

## Realizing what one already has: GRATITUDE



	Before	During	After
Realizing what one already has, feeling thankful	100	112	152
Not overthinking small stuff	100	95	234



## 2 VALUES RESHUFFLED

### FAMILY TOPS THE LIST ONCE AGAIN

Fear of losing and longing for the loved ones, made Turkish consumers remember the importance of family.

" I will spend more time with my family in the future (post-covid)"

72%



### POST-COVID IMPLICATIONS

- ✓ Increased family time
- ✓ Simple pleasures/fun activities together, family feasts with nostalgic tastes, big family re-unions, increased rate of marriage and child birth



### 3 FROM "ME" TO "US"

Society recalled the spirit of solidarity. Expectations from brands to be socially responsible will continue to grow.



#### NEED FOR BRANDS THAT CAN TOUCH HEARTS



Brands starting to produce masks



Brands feeding stray animals



Voluntary grocery shopping for 65+

Brands prioritizing employee health & safety



Brands creating jobs in this period



Thinking about others, support for vulnerable.



#### POST-COVID IMPLICATIONS

- ✓ Increased expectation from brands to come up with social responsibility campaigns
- ✓ Transparent and humane brands

## 4 TIME TO TAKE A BREATH

Stuck-in feeling due to isolation at home will result in consumers fleeing to open air at the first possible opportunity.

64%

I wish to spend time in the nature, make picnic, walk on the seaside at the first opportunity



### POST-COVID IMPLICATIONS

- ✓ Increased public interest in outdoor activities

## 5 CRAVING FOR SIMPLICITY

Most of the consumers questioned their priorities and decided to simplify their lives, living situations and places, homes...

### AFTER CORONAVIRUS



### POST-COVID IMPLICATIONS

- ✓ Postponement of purchase of discretionary items/ services
- ✓ Investing in experiences rather than things



## 6 HYGIENE360

Going forward, hygiene assurance / hygiene indicators will be the most important choice criteria for shoppers.



94%

I will pay more attention to hygiene in «out of home» places

91%

I will continue to be more careful about personal hygiene

71%

I will continue cleaning my home more frequently

51%

I will continue washing product packages

**TOP 5 PRODUCT BENEFITS CONSUMERS ARE WILLING TO PAY MORE FOR:**

Keep my family safe against germs-bacteria



Kills germs-bacteria in an effective way



Kills germs-bacteria in a natural way



Keep my immune system strong



Keep my family safe from diseases



### POST-COVID IMPLICATIONS

- ✓ Social distance/hygiene measures
- ✓ Hygiene expectation in stores and warehouses
- ✓ Risk groups might continue to stay away from stores for a while

# 7 EATING FOR HEALTH

Eat at home / Cook at home trend is likely to continue with healthy living / eating and budget control motivations.



I cook at home more frequently



I will eat out of home less



I eat healthier



## IMMUNITY = NATURAL PRODUCTS

Products preferred for enhancing immune system

Fruits & Vegetables 61%

Honey 56%

Pickles 42%

Dry Fruits & Nuts 46%

Vitamins Supplements 41%

Red & White Meat 38%

Ginger 36%

Turmeric 32%

Broth 32%

Prebiotics 30%

Mint 23%

Kinin 5%

## POST-COVID IMPLICATIONS

- ✓ Decrease in out of home consumption and home delivery
- ✓ Increased interest in healthy, economical and reliable food

## 8 THE OMNICHANNEL ENCOUNTER

There are consumers who shopped online for the first time, and a majority increasing their online purchases. Strong signs of continuity as well..

### POST-COVID IMPLICATIONS

- ✓ Persistent growth in e-commerce sales





## 9 SOCIAL EQUALITY: TRUE OR FALSE?

Regardless of social classes, virus has threatened everyone equally, stuck everyone to their homes. Even though staying at home has created a sense of equality, economic conditions point out to a persistent difference between rich and poor.

*«Coronavirus has evened out rich and poor, there is no difference in between them any more»*



### POST-COVID IMPLICATIONS

- ✓ Tendency to save more for similar unexpected periods in the future

# 10 SELF IMPROVEMENT CRAZE

Consumer interest in education, self-development and investing in oneself will continue to accelerate.



**59%**

I see this period as an opportunity for my personal development



I learn new skills- such as cooking recipes, hair-cutting, skin care etc- from video websites like Youtube and apply these



I started to devote more time for self-development activities such as learning foreign languages / computer programming

## POST-COVID IMPLICATIONS

- ✓ Online personal development applications, videos, websites becoming more popular.

# 11 YOU'D BETTER SHAPE UP

In order to pass time, entertain oneself and cope with negative feelings, watching series (especially Netflix) and snacking till late at night has become a widespread habit. With an effort to balance this, exercising at home has also become popular. Becoming and staying fit will be at the top of priority lists in the upcoming periods.

To cope with difficult times:



62%

Watch TV, series



55%

Cook



44%

Eat



39%

Watch Netflix

52%

1 in 2 exercised more at home during this period

78%

I will put myself into intensive care after coronavirus ends

## POST-COVID IMPLICATIONS

- ✓ Increased interest in exercise, fitness products
- ✓ Increased interest in weight management, light/low cal food products



## 12 RAINY DAY FUND

Consumers are in a period of more careful spending with a focus on saving.



### POST-COVID IMPLICATIONS

- ✓ Save-up more/ avoid luxuries
- ✓ Price increase expectation/more attracted to promotion
- ✓ Private label gaining traction

# 87%

POSTPONED ALL  
SPENDING EXCEPT  
GROCERY  
SHOPPING



# 82%

«ANYTHING CAN  
HAPPEN ANY TIME"  
I WILL SAVE MORE



# 70%

MY HOUSEHOLD  
BUDGET GOT  
AFFECTED

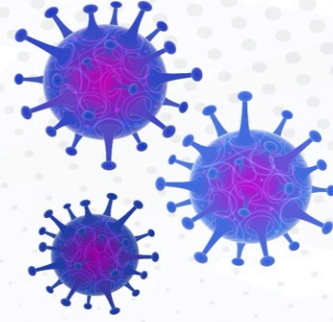


# %57

I ONLY BUY  
NECESSITIES, CUT  
ON LUXURIES



# Covid-19 Response of **MiGROS** **TİCARET A.Ş.**



# MIGROS BETTER FUTURE SUPPORT PACKAGE



## EMPLOYEE HEALTH & WELLNESS

- Vitamin C Supplements & Food Aid
- Personal Hygiene & Motivation Trainings
- Psychological Support
- 4-fold Bonus
- PPE



## E-COMMERCE

- 5x Capacity Increased
- Click & Collect
- Contactless Delivery



## EMPOWERMENT OF PRODUCERS & FARMERS

- Collaboration with the National Bank for Producer
- Financing System



## CUSTOMER HEALTH (AND WELLNESS)

- Hygiene Measures & Social Distancing
- Contactless & Mobile Payment
- Self-Check-Outs



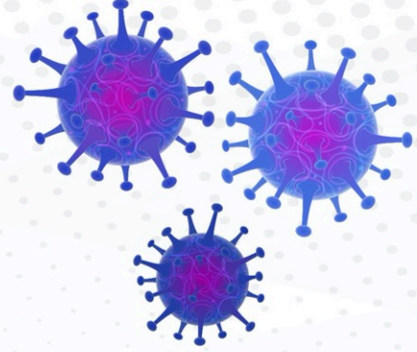
## SOCIAL CONTRIBUTIONS

- +5000 New Employment
- Senior Citizens Supports
- Discounts for Healthcare Professionals
- Card of Goodness - Collaboration with Turkish Red Crescent





# Covid-19 Response of **MİGROS** **TİCARET A.Ş.**



The first case in Turkey was announced on March, 10 2020

**March 14th**

- ▶ Store Hygiene Routines
- ▶ Online Hygiene Trainings for Employees
- ▶ Hygiene Dispensers Located at Stores
- ▶ Migros Sanal Market (e-commerce channel)
- ▶ Hygiene Measures

**March 17th**

- ▶ Contactless Payment Announcement
- ▶ Social Distancing Implementations

**March 21st**

- ▶ Free of Charge Delivery for Senior (60+) Customers

**March 23rd**

- ▶ Migros TV Channel
  - Live Concerts
  - Blogs
  - Cooking Recipes
  - Children Entertainment Events



**March  
24th**

- First in Turkish Retail Sector:  
Using plexy face shield in  
addition to face mask

**March  
27th**

- Social Distancing  
Implementations: restriction  
for number of customers  
in the stores
- Click and Collect Service for  
Migros Sanal Market  
(e-commerce channel) shoppings

**March  
28th**

- Dedicated Delivery Time  
Slot for Senior (65+)  
Customers

**April  
3rd**

- Disabled the "paying at the door"  
option for Sanal Market operations

**May  
13th**

- Migros and Ziraat Bank  
(National Bank) Collaboration:  
Producer Financing System

**April  
28th**

- Migros Supports Producers:  
Supplied the artichoke and  
basil that remained unsold  
after harvest.

**April  
20th**

- 5% discount to Healthcare  
Professionals for their  
purchases up to 500 TL

**April  
15th**

- +5000 New Employment for store  
and online operations
- Home delivery services in our online  
operations increased 4 times





Our employees at store are using face shield in addition to face mask as a first in the Turkish retail sector



All employees have personal disinfectant, cologne, and hand cream



Providing food aid, Vitamin C supplements and fruits to our employees to empower their immune system.



Exclusive Hot Line for our employees: Psychological and Medical Counseling To Our Employees

#### EMPLOYEE HEALTH & WELLNESS



#### CUSTOMER HEALTH (AND WELLNESS)

#### SOCIAL CONTRIBUTIONS

#### E-COMMERCE

#### EMPOWERMENT OF PRODUCERS & FARMERS



**Allianz** 



Providing cost of Covid 19 treatment through Dr. Allianz application as a part of private health insurance



Providing regularly to employees training of hygiene and keeping their motivations up



Our frontline employees were awarded with 4-fold bonus.

**EMPLOYEE HEALTH  
& WELLNESS**



**CUSTOMER  
HEALTH  
(AND WELLNESS)**

**SOCIAL  
CONTRIBUTIONS**

**E-COMMERCE**

**EMPOWERMENT  
OF PRODUCERS  
& FARMERS**



Remote work was applied for Headquarter and Regional Offices during the peak point of pandemic



Commercials on the National TV Channels To Motive Our Employees: "Meeting demand of our customers is no longer just a job, it is a mission and a duty." and "Thanks to Each Employee at Store."

**EMPLOYEE HEALTH  
& WELLNESS**



**CUSTOMER  
HEALTH  
(AND WELLNESS)**

**SOCIAL  
CONTRIBUTIONS**

**E-COMMERCE**

**EMPOWERMENT  
OF PRODUCERS  
& FARMERS**





Disinfection applications by expert teams for our stores and warehouses



Cash registers, POS machines, shopping carts and baskets, and service aisles in our stores are disinfected for 5 times a day

**EMPLOYEE  
HEALTH  
& WELLNESS**

**CUSTOMER HEALTH  
(AND WELLNESS)**



**SOCIAL  
CONTRIBUTIONS**

**E-COMMERCE**

**EMPOWERMENT  
OF PRODUCERS  
& FARMERS**



Restricted number of customers are welcomed to our stores for maintaining the social distancing.



Communication to increase use of contactless payment. Mobile payment option was activated at all check-outs.

**EMPLOYEE  
HEALTH  
& WELLNESS**

**CUSTOMER HEALTH  
(AND WELLNESS)**



**SOCIAL  
CONTRIBUTIONS**

**E-COMMERCE**

**EMPOWERMENT  
OF PRODUCERS  
& FARMERS**





Liquid hygiene dispensers located in the entrance and exit of our stores.



Customer reminders for 1.5 m social distancing lines around the check-outs.

**EMPLOYEE  
HEALTH  
& WELLNESS**

**CUSTOMER HEALTH  
(AND WELLNESS)**



**SOCIAL  
CONTRIBUTIONS**

**E-COMMERCE**

**EMPOWERMENT  
OF PRODUCERS  
& FARMERS**



Always offered our customers full shelves thanks to collaboration with our suppliers and smart stock planning.



In order to say thank you to all NHS heroes, we exclusively provided 5% discount to Health Care Professionals for their purchases up to 500 TL.



Together with the group companies, we made donation to the National Solidarity Campaign conducted by the Presidency of Republic of Turkey to support the measures, implementations and fight against the Covid-19.

**EMPLOYEE  
HEALTH  
& WELLNESS**

**CUSTOMER  
HEALTH  
(AND WELLNESS)**

**SOCIAL  
CONTRIBUTIONS**



**E-COMMERCE**

**EMPOWERMENT  
OF PRODUCERS  
& FARMERS**





Ramazanda  
ihtiyacın olan her şey  
bu kolilerde.  
Öncelik büyüklerimizde!

60 yaş ve üzeri  
müşterilerimize özel  
"Önce Büyüklerimiz"

sipariş hattını hemen arayın,  
Ramazan koliniz kapınıza gelsin.

Bu hizmet İstanbul, Ankara ve İzmir'de geçerlidir.



☎ 0850 955 24 65

Ertesi gün  
ücretsiz  
teslimat

Havale ya da  
kredi kartıyla  
kapıda ödeme  
seçeneği

Ramadan boxes: Exclusive boxes containing main packaged food products with a discounted prices up to %45

Dedicated an exclusive phone line to customers aged 60 and older. They could order and get Ramadan boxes with priority without paying delivery fee.

EMPLOYEE  
HEALTH  
& WELLNESS

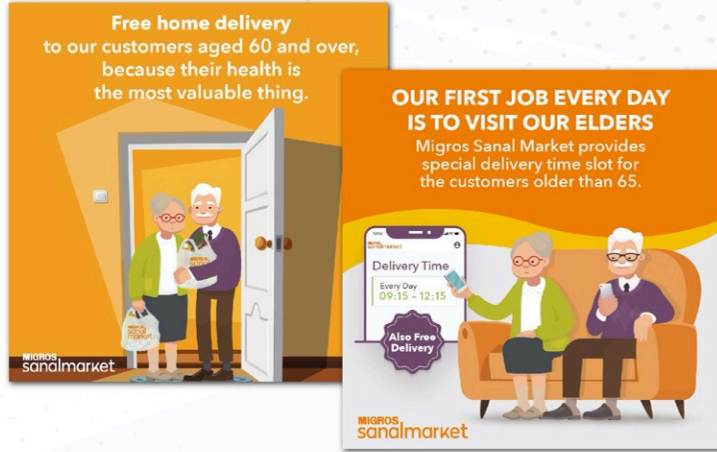
CUSTOMER  
HEALTH  
(AND WELLNESS)

SOCIAL  
CONTRIBUTIONS



E-COMMERCE

EMPOWERMENT  
OF PRODUCERS  
& FARMERS



Provided home delivery free of charge to the customers older than 60. After the declaration of corona virus curfew in Turkey for senior people, morning time slots for home deliveries were dedicated to the customers older than 65. Number of customers in this age range, who are using online channels are tripled.



Collaboration with the Turkish Red Crescent. When Migros customers buy "Card of Goodness" of TRY 50, Migros contribute additional 5 percent to the Card. The Turkish Red Crescent delivers the Card to people in needs in 81 cities around the Turkey.

EMPLOYEE  
HEALTH  
& WELLNESS

CUSTOMER  
HEALTH  
(AND WELLNESS)

SOCIAL  
CONTRIBUTIONS



E-COMMERCE

EMPOWERMENT  
OF PRODUCERS  
& FARMERS





Besides supporting health, basic needs and budget of families, we also supported their social lives. Migros TV used digital media to make the time at home enjoyable by constantly broadcasting thousands of videos, blog content, recipes, talk shows and live performances of various artists.

EMPLOYEE  
HEALTH  
& WELLNESS

CUSTOMER  
HEALTH  
(AND WELLNESS)

SOCIAL  
CONTRIBUTIONS



E-COMMERCE

EMPOWERMENT  
OF PRODUCERS  
& FARMERS





## First Health, Then Service!

Migros Sanal Market attach great importance to cleaning and hygiene.



All equipments such as collection box and cart, tablet, barcode reader and distribution vans are regularly disinfected. Hand sanitizers are placed in our vans. Before and after each delivery our employees disinfect their hands.

**EMPLOYEE  
HEALTH  
& WELLNESS**

**CUSTOMER  
HEALTH  
(AND WELLNESS)**

**SOCIAL  
CONTRIBUTIONS**

**E-COMMERCE**



**EMPOWERMENT  
OF PRODUCERS  
& FARMERS**



Disabled the “paying at the door” option for Migros Sanal Market deliveries to reduce contact. Either hang our customers' shopping bags to their door or leave them in front of the doors.



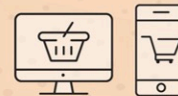
Started Click & Collect service for our online channel. Our customers pay online for their shoppings via Migros Sanal Market website or mobile app and they can pick up their purchases from the store whenever they want.

**EMPLOYEE  
HEALTH  
& WELLNESS**

**CUSTOMER  
HEALTH  
(AND WELLNESS)**

**SOCIAL  
CONTRIBUTIONS**

**E-COMMERCE**



**EMPOWERMENT  
OF PRODUCERS  
& FARMERS**



Widened service network from 58 cities to 81 cities (all around Turkey).

Additional 5,000 new employment to balance the workload of our employees in our stores and Migros Sanal Market operations.



Total number of home delivery via Migros Sanal Market has increased 5 times

**EMPLOYEE  
HEALTH  
& WELLNESS**

**CUSTOMER  
HEALTH  
(AND WELLNESS)**

**SOCIAL  
CONTRIBUTIONS**

**E-COMMERCE**



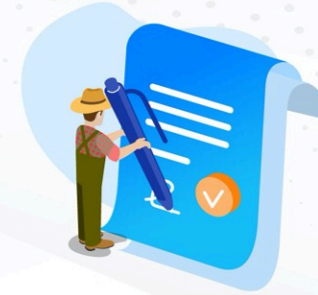
**EMPOWERMENT  
OF PRODUCERS  
& FARMERS**





Worked closely with agricultural farmers co-op and supported local producers and farmers by supplying the artichoke and basil remained unsold due to cancellation of festivals.

 **Ziraat Bankası**



Producers Financing System: In collaboration with Ziraat Bank (National Bank), created a digital platform to make the payments of farmers cash right after they deliver the products to Migros

**EMPLOYEE  
HEALTH  
& WELLNESS**

**CUSTOMER  
HEALTH  
(AND WELLNESS)**

**SOCIAL  
CONTRIBUTIONS**

**E-COMMERCE**

**EMPOWERMENT OF  
PRODUCERS & FARMERS**







During the peak point of the pandemic, purchasing limit are applied for the basic needs to meet every customers' demand.



By monitoring our stock closely, providing instant and accurate information through our B2B platforms.

**EMPLOYEE  
HEALTH  
& WELLNESS**

**CUSTOMER  
HEALTH  
(AND WELLNESS)**

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## About Migros Ticaret A.Ş.

Migros Ticaret A.Ş. is the leading supermarket chain of the Turkish food retail sector, which was founded in 1954.

Migros has an omni-channel structure in order to get closer to the customers, operating supermarkets, premium supermarkets under Migros (M, MM, MMM, 5M and Migros Jet) and Macrocenter brands, food service wholesale and also online & mobile retailing in all over Turkey. Its abroad operations with Ramstore brand are located in Kazakhstan and North Macedonia. Migros Sanal Market (e-commerce channel) is Turkey's first, largest and most widely used e-commerce website focusing on fresh food.

Migros Ticaret A.Ş. offers the widest range of good agriculture, good meat and high-quality products at the best prices and with outstanding customer service, and offers the basic needs of households with the best prices in the market, without compromising on quality.

Migros Ticaret A.Ş. categorize its sustainability priorities and focus areas, namely environmental, social and economic, under 12 headings as part of Migros Better Future Plan. Accordingly, Migros Ticaret A.Ş. is the first and only retailer to be listed in the Borsa İstanbul Sustainability Index six years in a row. In addition, Migros

has been selected among the "CDP Turkey Climate Leaders" for three years due to the company's plans and efforts combatting climate change. Migros Ticaret A.Ş. is an executive member of the Consumer Goods Forum and the only Turkish company within the One Planet Business for Biodiversity (OP2B) coalition. For more information,

visit [www.migroskurumsal.com/en](http://www.migroskurumsal.com/en)



## About Nielsen

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Nielsen is divided into two business units. Nielsen Global Media, the arbiter of truth for media markets, provides media and advertising industries with unbiased and reliable metrics that create a shared understanding of the industry required for markets to function. Nielsen Global Connect provides consumer packaged goods manufacturers and retailers with accurate, actionable information and insights and a complete picture of the complex and changing marketplace that companies need to innovate and grow. Our approach marries proprietary Nielsen data with other data sources to help clients around the world understand what's happening now, what's happening next, and how to best act on this knowledge. An S&P 500 company,

Nielsen has operations in over 100 countries, covering more than 90% of the world's population.

For more information, visit [www.nielsen.com](http://www.nielsen.com)



## About The Consumer Goods Forum

The Consumer Goods Forum ("CGF") is a global, parity-based industry network that is driven by its members to encourage the global adoption of practices and standards that serves the consumer goods industry worldwide. It brings together the

CEOs and senior management of some 400 retailers, manufacturers, service providers, and other stakeholders across 70 countries, and it reflects the diversity of the industry in geography, size, product category and format. Its member companies have combined sales of EUR 3.5 trillion and directly employ nearly 10 million people, with a further 90 million related jobs estimated along the value chain. It is governed by its Board of Directors, which comprises more than 50 manufacturer and retailer CEOs. For more information, please visit:

[www.theconsumergoodsforum.com](http://www.theconsumergoodsforum.com)