



Customer behaviour.

Forever redefined?

Tips on how customer attitudes and habits have changed in lockdown, and new behaviours that must be understood to thrive in the “new normal”.

Think you know your customers? Think again.



At a time when it seems so much has changed, many of us are questioning how long-held behaviours are going to be affected. Will you still recognise your customers post-pandemic?

The answers to each question will be different for everyone, but answering them with clear, focused research will light up the path to more effective customer engagement in the months to come.

Making sure that brand communication appeals to customers in this “new normal” may feel like an overwhelming task right now. Especially when you’ve got strategy to refine, new campaigns to develop, and concepts to feed back on.

But before you rally the troops, brainstorm new ideas and begin putting pen to paper—take a step back. Not only will taking time to check and test your approach save you countless wasted hours, it will also drastically increase your chances of landing your message successfully.

Fear not, because the following pages are packed with insight.

**WE LIVE TO
UNDERSTAND**

Published by Solutions Research
© 2020 Solutions Research

All rights reserved.

No part of this publication may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopy or any storage and retrieval system, without permission in writing from Solutions Research.

Contents

- 04 Risk
- 05 Paradox
- 06 Planning
- 07 Frustration
- 08 Loyalty
- 09 Ethics
- 10 Truths
- 11 Support
- 12 Let’s Talk

Find out more

Get in touch to chat to our team of specialists about how customer research can help your business.



+44(0) 20 7700 5500



www.solutions-research.co.uk

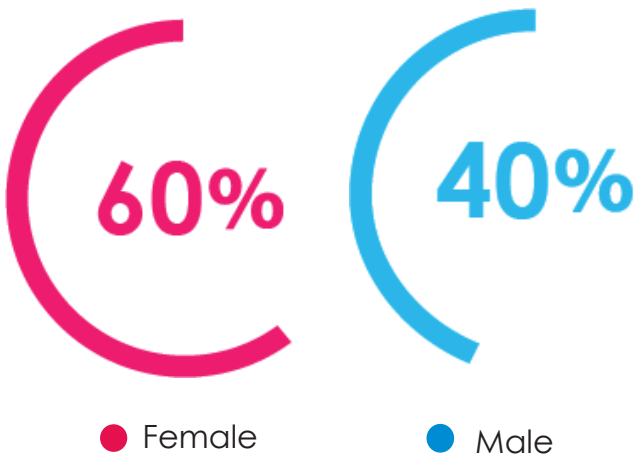


Our online research

WE LIVE TO UNDERSTAND

We asked an online community of respondents to share their stories of ways ‘what, why and how’ they buy changed during lockdown, and the new behaviours and attitudes they expect to stick with as “normal” life resumes.

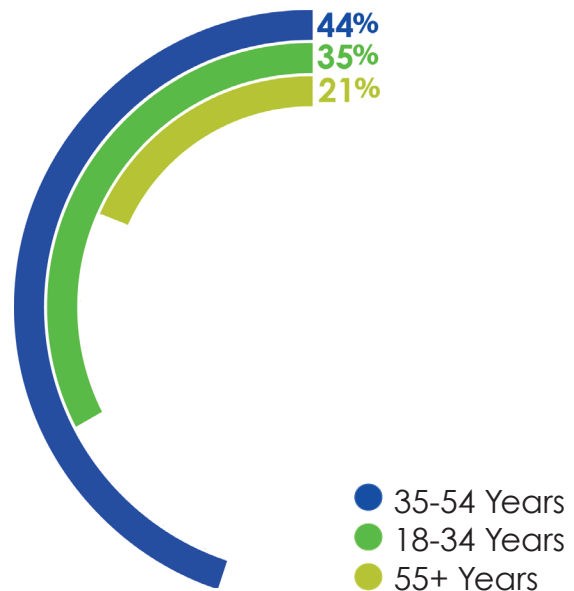
Respondents—By Gender



The findings presented in this report are based on the results of investigative online research conducted by Solutions Research between 05th and 15th May 2020, designed to understand the ‘human truths’ behind customers’ new behaviours.

This report takes into account data collected from a sample size of 110 respondents, across the UK.

Respondents—By Age



Online Research Solutions

Our online research solutions are the best way to reach and engage communities—whoever and wherever they are.

Get quick and deeper-dive responses to the issues that matter to you (and your customers), so you can bring research to life like never before. Check-in on what your target audience has to say at any time—using video platforms to deliver traditional qualitative methodologies. Access volume depths, with ‘first thought’ responses for fast, cost efficient evaluation. Capture ongoing routines and behaviours in rich detail.

All the benefits of group research, in-depth interviews and online clinics are a click away with our range of digital research solutions.

- ✓ Tailor your research
- ✓ Quickly unlock insights
- ✓ Access online communities
- ✓ Unlimited geographical reach
- ✓ Fast, effective and proven

Contact Emma Dicks who leads our research and insight team to learn more.

© emma@solutions-research.co.uk

Pandemic risks spread new behaviours

Few could have predicted just how much life as we know it would change as a result of the Covid-19 pandemic, with the nation forced to rethink many of its established behaviours.

Risk Avoidance

One thing has pre-occupied many people's thoughts in recent months—minimising exposure to risk. The Covid-19 pandemic was first and foremost a health emergency but it also influenced our approach to many daily routines. Whether in our search for regular and trusted news sources and tuning into daily government briefings, our sudden reluctance to visit our regular supermarket—preferring instead to order online—or turning to the brands we trust most. Unsurprisingly, hygiene and cleaning product sales saw a sharp increase as households adopted new or more rigorous cleaning regimes.

Enforced Choice

In the early days of UK lockdown, availability issues surrounding many 'basics' meant that necessity often became a key driver of purchase decisions. In the four weeks to 04 June 2020, 67 per cent of our respondents reported that new food brands and products had made their way into household cupboards and freezers. For drink and beverage products, the figure was 45 per cent.

Top 5 categories that saw new products and brands entering households

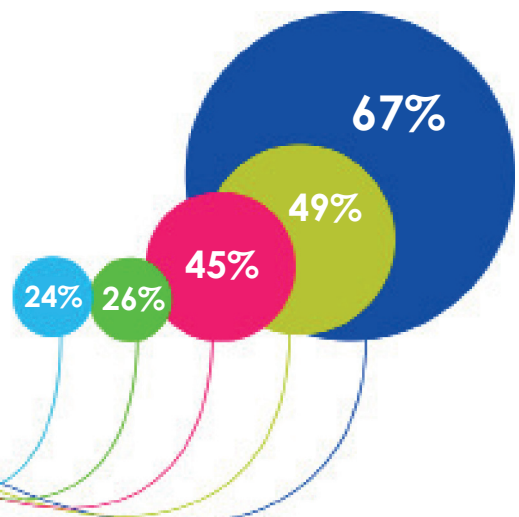
Food
Cleaning
Drink
DIY
Gardening

Top 3 suggest availability drove switch of 'basics'. A focus on more comprehensive cleaning regimes in households also saw customers embracing new brand products for the first time. With more time at home, people also explored new brands and products as they sought to complete DIY and garden projects.

Online Clicks

Lockdown saw a large number of people turning to the Internet to fulfil their shopping needs, especially for their groceries. A mix of unfamiliarity with using the platform and a breaking of the subconscious behaviour that customers exhibit when undertaking their regular food shopping trip—almost shopping on auto-pilot—often resulted in customers introducing a greater variety of new and alternative brands into their basket.

Key reasons given for changes in shopping habits during lockdown.



Paradox behaviour post-lockdown

As customers learn to blend their lives before lockdown with the “new normal”, we are likely to see a number of paradoxical behaviours and attitudes emerge within communities.

FOGO vs. YOLO

In a pre-lockdown world, fear of missing out (FOMO) was a thing. We didn't want to lose out on the cool new restaurant taking bookings and the party everyone was going to. But that was a world before Covid-19.

For many, FOMO was replaced by a fear of going out (FOGO)—due to anxiety and movement restrictions. With work schedules freed and demanding social diaries empty, others began to embrace a newfound joy of missing out—free from the pressures that can sometimes come with busy lives.

As we exit the pandemic, and pent up frustration is released, could we begin to see a growing trend for placing even higher value on experiences? This may possibly see people adopting more of a you-only-live-once (YOLO) mentality, as they increasingly look to embrace “fun in the moment”.



New Discoveries

Despite Covid-19 heightening our aversion to activities which may pose a risk to our health, and that of others, a growing number of people embraced lockdown as an opportunity to actually move out of their comfort zones and try something new. From throwing themselves into learning a new skill, to expanding their recipe repertoire, or undertaking ambitious DIY projects.

Lockdown also fuelled customers' appetite for discovery, with people looking for inspiring content and armchair escapism—from expanding our minds through webinars and podcasts, to a growing interest in healthy eating and wellbeing.

This is likely to see an expectation amongst customers for brands and retailers to satisfy an even greater hunger for inspiring content that helps to expand our horizons, beyond the four walls of our homes, post-lockdown.



Planning to buy, less on impulse

With the freedom to window-shop taken from us, the pandemic caused certain purchasing behaviours to shift fundamentally. Stores may now be open, but the emphasis (and eyes) of customers will likely be on watching the pennies in the months to come.

More Organised

Thirty years ago, the 'big weekly shop' was a staple of UK grocery shopping. That was before supermarkets shifted their focus and, as a result our behaviour, driving huge growth in on-the-go and meal-for-tonight offerings.

There is no doubt that many of us have become more organised during lockdown, especially when it comes to food shopping. Our research highlighted a number of reasons for this. Firstly, limiting the number of trips made to the supermarket to avoid exposure to risk. Secondly, ensuring visits to a physical store could be completed quickly. For those shopping online, having a clear list made, what for some was an unfamiliar experience, more focused and easier to manage. With more time of their hands, people also began to plan beyond simply a 'meal-for-tonight'.

New Favourites

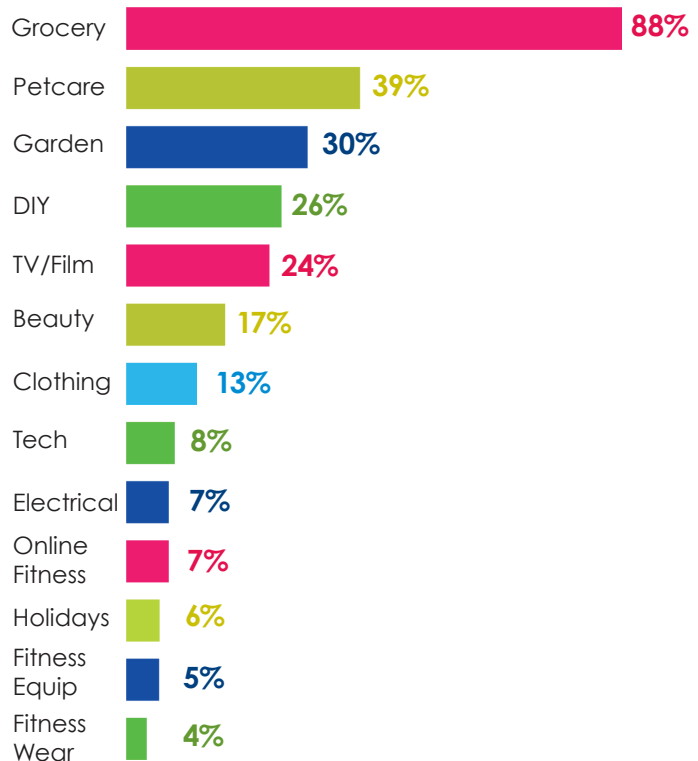
The greater planned consideration of purchases has also led to an increase in the number of retailers that customers are willing to shop at.

New behaviours have been formed, with customers now actively seeking out more products from specialist retailers, such as local butchers and farm shops. Even the humble Milkman is enjoying resurgence in popularity.

Inspire Me

Customer will likely look to retailers and brands to support their move away from regular small basket shops to fewer, larger shops. This will require brand communications to focus on helping customers to plan meals and buy more efficiently. For example, providing serving suggestions for how to use ingredients in multiple dishes, make-now-for-later, and reduce wastage.

What are people prepared to spend money on at the moment?



"Non-Essential" Spending

Despite this, our respondents expressed their very real concerns over the economic fallout of Covid-19—discretionary income is expected to come under intense pressure in the coming months.

As a result, we could see customers grappling with guilt about spending in more conspicuous categories, preferring instead to invest in 'something that is meaningful to me', with rather than sacrificing savings and longer-terms plans to buy "non-essential" materialistic goods. The desire to embrace substitute brands that are cheaper and just as effective may also become even harder for customers to resist.

From forgiveness to frustration

In many ways, the UK is ready-made for the new social distancing restrictions—we're known the world-over for our love of a good queue. But patience also doesn't last forever.

Pressure Eased

One positive of lockdown is that we have all (well, most of us) become more tolerant and forgiving —“You expect certain items to be scarce on the shelves, but you work around that,” as one respondent stated.

The inability to secure a home delivery slot was forgiven because we understood the sudden increase in demand that retailers faced and that, more importantly, the needs of others more vulnerable than ourselves came first.

Delay Okay

The expectation that we will now be faced with long queues when we go shopping is something that customers, in the main, are accepting of—it is for the safety of all.

Experiencing delays in shipping and delivery of goods quickly became the norm, even when buying from the biggest online platforms—“As a Prime customer I normally get next day delivery but some Amazon orders are taking as long as a week to arrive now.” But that was ok. We understood why.

And did it really matter that much anyway? With our busy daily schedules now freed from hectic work and social commitments, time took on a new meaning.

“
I expect shopping to take longer
due to social distancing. I expect
products to be out of stock.”



Patience Tested

As ever, it is a lack of communication that can create the greatest frustration. Our respondents recounted examples of email notifications and updates about deliveries often being conspicuous by their absence. If anything, communication about when products would arrive or order delays was said to be much reduced, in comparison to “normal times”.

In terms of what good looks like, it is not about more communication, but the right communication. In times of crisis, especially, people need to be kept informed. Providing reassurance, confidence and peace of mind will remain key for brand communication in the months ahead.

Brand loyalty in time of crisis

Customers have sought out certainty in this uncertain Covid-19 world. A key purchasing decision—consciously or subconsciously—is linked to reducing levels of perceived risk by buying from a brand that they know and trust.

Trusted brands

The pandemic reaffirmed just how strong the power of brand can be. Our respondents commonly cited trusted brand as a top consideration in their purchasing decisions—almost a “flight to safety”.

Trusted everyday staple brands provided comfort at a time of crisis. And if you're fortunate enough to be one of these brands, it seems customers are not prepared to compromise.

Our research highlighted that customers felt an additional sense of responsibility during the pandemic to look after both themselves and their loved ones. Aside from physical health, this meant serving up a taste and quality that they knew and loved.

Family Favourites

The events of recent months have shown that the nation's best-loved brands really do have a place in our hearts, and are an integral part of family life.

Whether perceived as bringing ‘small moments of joy’ to our day, or in the case of those with families spending hours together in the same house, perhaps a desire to keep conflict to a minimum. Switching breakfast cereal favourites for children was a particular no-no. And even in lockdown, it seems it still “Has to be Heinz”.



Brand Switching

In the early days of lockdown in the UK, necessity sometimes was of paramount consideration, rather than brand or price. Many customers also turned to local convenience stores, rather than major supermarkets—due to large queues or anxiety over visiting densely populated spaces. This enforced change in where customers shopped meant customers sometimes had to switch to substitute or alternative brands—buying second or third choice products.

Shopping Around

When it comes to brand loyalty to individual retailers, we can expect enforced changes in customer behaviour to stay with us for some time yet.

A combination of customers being encouraged to shop locally, a lack of home delivery slot availability, and out-of-stock issues, has seen customers quickly become used to shopping around. One retailer (sometimes any retailer with an available delivery slot) for food items, another for cleaning products, another for those hard to find items—and so on.

Our eyes and minds have been opened to new behaviours in recent months. Customers may be slow to change back.

“

It's of little surprise that heightened anxiety around cleanliness during the pandemic saw customers reaching for the brands they trust. As one respondent commented, ‘anything with the name Dettol on I trust’.”

Demand for brands to 'do the right thing'

Isolation has put community values firmly in the spotlight. It's also shone a laser-focus on the brands that act honestly and purposeful—and those who don't.

Brand Perception

Our respondents provided a clear indication that conflicting perceptions are often present in the minds of many customers, with a significant majority seeing pandemic-related marketing messages both as a "force for good," as well as "trying to take advantage" of the situation.

People First

Our respondents looked favourably on those brands that clearly demonstrated their willingness to put people before profit—their actions have not gone unnoticed by customers. Be that making concessions and offering support for key workers, looking after the vulnerable, or making the safeguarding of their own staff a priority.

Retailers that remained open, insisting that their services were essential, were highly criticised by respondents for appearing to put profit before people. Sainsbury's was just one example highlighted by our respondents, who questioned why Argos shop-in-shop stores remained open inside its supermarkets despite everything they sell being 'non-essential'

Lockdown Legacy

Reinforcing the findings of many other recent industry studies into customer attitudes, our respondents said that the way brands conduct themselves during the crisis would impact whether they do business with them in the future.

As a result of the pandemic, customer expectations will increasingly focus on whether a brand acts in a way that is viewed as responsible. Customers are likely to buy into brands with social values that align with their own, and boycott those that don't.

Business continues to wake up (and in increasingly non 'woke' ways), that more honest and sincere dialogue is what's needed to connect them better with consumers. They have to 'walk the walk, not just to talk the talk' in these areas.



Believable Brands

Whether it's the high-profile support of key workers or diversity campaigning that has been seen during lockdown, it's often easy to dismiss the slew of hastily made brand statements and messages as low-cost tokenism.

Gesture politics and lip service in lieu of sincere or committed action. But the reality is that customers will increasingly 'buy what I believe in'. It's why it has never been so important for research to reflect all of us.

What does the future look like?

Different.



There will be lots of factors that will contribute to the success of customer engagement moving forward. We believe that the most important thing, more than ever, will be to put yourself in your customers' shoes and develop a greater understanding about what matters to them.

Post-Pandemic Truths



Thriving in the post-COVID-19 future will ultimately require brands to look again at established thinking and seek new insight to effectively lower the customer hurdle to engagement.

Doing so may require adopting a rapid "test and learn" approach, supported by robust research, so they can quickly pivot to determine the most compelling messages for various customer segments.

As shoppers look to purchase items that meet their needs in the "new normal", it will be paramount for brands to be able to immediately communicate how their products fulfil these criteria.

Brands will likely need to adjust their marketing tone and message to reflect consumers' new reality.

Customers will increasingly appreciate brands that exhibit a social purpose and communicate honestly.

Those with high brand loyalty can further grow their presence and business by communicating reliability and instilling further trust in the brand. For new and niche players, communicating reasons to trust, and ensuring a "first-time right" experience, could become more important than ever.

Vital Next Steps

01

Listen

It all starts with listening to customer preferences—not once or twice, but continually. Especially now; attitudes and behaviours are changing all the time.

02

Apply

Leverage customer research to uncover key insights that will make the all-important difference when it comes to shaping and refining brand communication.

03

Review

Now is the time to ask the million-dollar question: Is it working? This is the stage where you look at the results of customer research, and adapt your thinking and actions.

We're all learning about life post-lockdown. The 'right' path for you to create meaningful connections with audiences will keep evolving. Allow the voices of customers to guide your way.

Act Now

Lean into customer excitement about getting back to 'normal' activities by working with Solutions Research—your go-to specialist for trusted customer research and insight. We give agencies and their clients the essential support they need to move quickly, in the right direction. One thing is certain: if you don't invest in developing a better understanding of your customers, others will. So don't leave your brand communication to chance.

Need insights faster?

Work with us to build at-a-glance 'quick win' insights that can help to shape and influence concept development—for the better.

Part of your team

We work closely with your team, providing an invaluable additional resource to existing in-house or agency teams—giving you affordable, accountable and effective research support to help you achieve your goals, faster.

How we can support you:

A member of The Market Research Society, our expertise includes research, behaviour, analysis, insight, trends and customer experience.

- Insight Consultancy
- Digital Qualitative Research
- Socially-distanced face-to-face qualitative Focus Groups
- Depth Interviews
- Workshops & Facilitation
- Quantitative Research
- Pitch prep

WE LIVE TO UNDERSTAND

Get in touch to chat to our team of specialists about how customer research can help your business.

 www.solutions-research.co.uk

LET'S TALK

Solutions Research helps you create a deeper understanding of customer attitudes and behaviour, providing the insight you need to shape message development, test customer sentiment and perceptions, and make sure your brand communications truly engage and captivate.

Get in touch today.

 **+44 (0) 20 7700 5500**

 **www.solutions-research.co.uk**

Solutions Research

The Barn
Dalscote House
Dalscote
Nr Towcester
NN12 8NL

