



ONEMS
MINUTE SILENCE



SHOPPING IN LOCKDOWN

15 MAY 2020

STARK CHANGES IN SHOPPER BEHAVIOUR EARLY IN LOCKDOWN

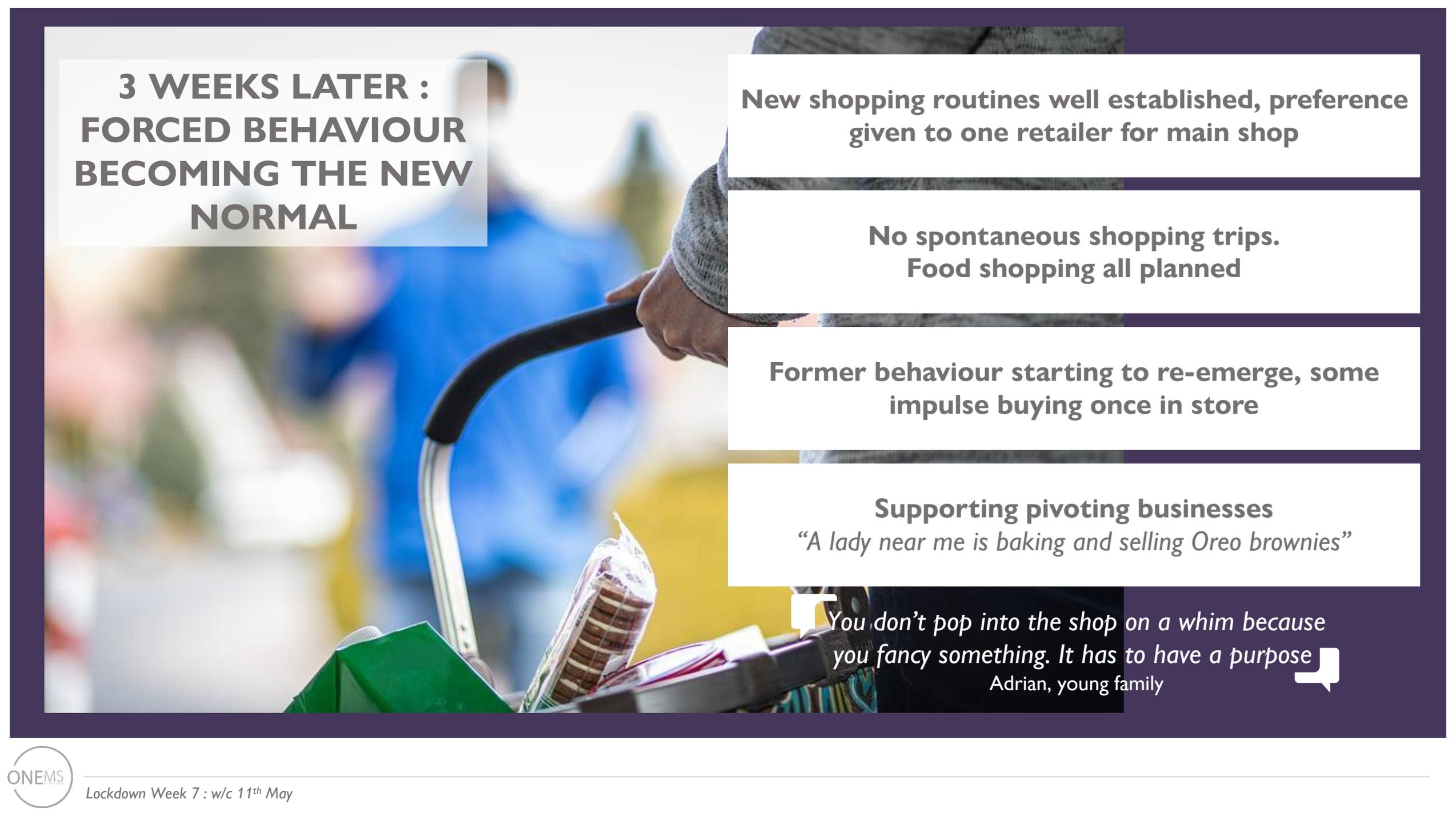
Early in lockdown supermarket shopping was anxiety inducing

Worries relating to keeping safe in supermarkets as well as product availability

Forced behaviour change meant more online shopping for essentials, no leisure shopping early in lockdown

Early stages of lock down saw growing reliance on local retailers, farm shops and independents

I am happy to do things differently because I am protecting my loved ones
Karen, older family



**3 WEEKS LATER :
FORCED BEHAVIOUR
BECOMING THE NEW
NORMAL**

New shopping routines well established, preference given to one retailer for main shop

**No spontaneous shopping trips.
Food shopping all planned**

Former behaviour starting to re-emerge, some impulse buying once in store

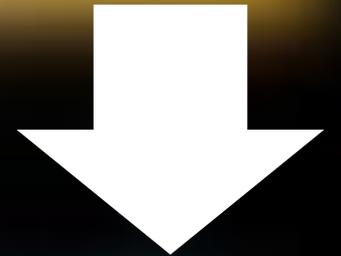
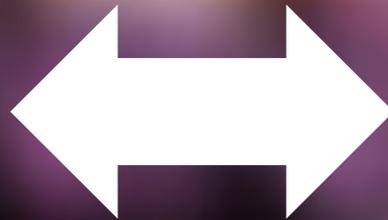
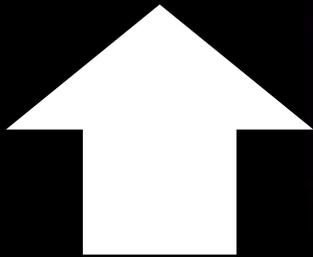
Supporting pivoting businesses
“A lady near me is baking and selling Oreo brownies”

You don't pop into the shop on a whim because you fancy something. It has to have a purpose
Adrian, young family

SHOPPING BASKET LARGELY UNCHANGED (TREATS THE MAIN EXCEPTION!)

Baking ingredients	Whole Fruit and Veg	Cakes and biscuits	
Alcohol	Sweet/Savoury Snacks	Cooking sauces/kits	Prepared Fruit and Veg
	Cleaning products	Yogurts/Desserts	Ready meals
	Frozen foods	Toiletries/personal care	
		Meat/Fish	

Own label versus branded



SUPERMARKET ENVIRONMENT IS PARAMOUNT

Well managed stores praised allows for good social distancing

Acknowledgement that stock levels have improved and close to BC* levels

Well managed environments allow time for browsing, typically shopping is 'in and out'

Polite and friendly staff provide reassurance, helps engender a sense of normality



SMALL FORMAT STORES HAVE A KEY ROLE IN NEW WAYS OF SHOPPING

A way of supporting local : farm shops, delis and independent retailers

I want to support family run businesses... plus the food is fresher and they're not packed full of people

Rachel

Noted for hidden 'pockets' of availability

I've bought alcohol from my local petrol station – they had loads when the supermarkets didn't!

James

Quieter, and less stressful (easier social distancing)

It's easy to get round small shops safely – it's all properly set up and I feel safe

Maggie

Used proactively, rather than reactively

They used to be for picking up things randomly, but not any more!

Stella

Incorporated into new routines

I use it (visiting convenience shop) as an reason to get out, and as part of my exercise regime

Greg

TOPICS FOR CONSIDERATION IN OUR NEW WORLD



List making and planning is paramount. Brands must be on shoppers' mental shopping list before getting on physical shopping list



In store fluency is vital. Strong and clear on-pack communication has never been more important



Over 70% of people in the UK are avoiding crowded spaces*. It will take a long time for shopper behaviour to return to 'normal'. Brands must equip themselves to flourish now



ONE MS
MINUTE SILENCE

Next week we will focus on spending behaviour and money management

For more information on this, and our other lockdown publications.
debbie@one-ms.com



Annual Conference 2016
Finalist Finalist
Best Overall Contribution



AQR PROSPER RILEY-SMITH
QUALITATIVE EXCELLENCE AWARD 2015

FINALIST

AQR



ADRIAN, 39

A pensions advisor, living with his wife and 2 children



MAGGIE, 57

After taking early retirement, she volunteers and keeps bees (along with various 'crafty' hobbies)



RHIANNON, 32

A self-employed jewellery designer, living alone in Birmingham



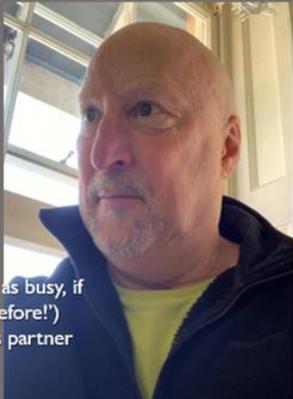
RACHEL, 39

Living alone, and working as a PA for a managing director



MATT, 40

A Projects Director in an engineering consultancy, with 2 small children, living in Birmingham



ANDY, 61

Retired (but 'just as busy, if not busier than before!') and living with his partner in Bristol



ANGELA, 39

Cabin crew for Virgin, living with her partner, 2 children and their cat



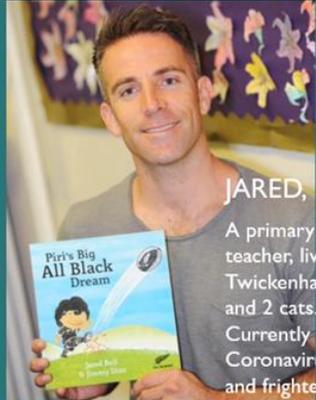
KAREN, 52

Works in the pastoral team in a school and has two children



JAMES, 37

A sales manager, used to travelling across the country, living with his partner and their young son



JARED, 37

A primary school PE teacher, living in Twickenham with his wife and 2 cats. Currently recovering from Coronavirus – a "gruelling and frightening experience"



STELLA, 33

A part-time finance manager, part-time housewife living with her husband, a toddler and a new-born in London



GREG, 54

A salesman, supplying and installing graphics and branding for Chelsea Flower Show. Lives alone in London

LIFE IN LOCKDOWN

An 8 week ongoing project with a small panel based across the UK

A mix of ages, lifestages and working status (including furlough)