



Lockdown Unlocked: Understanding consumer habits during COVID-19

September 2020

Bringing Ingenuity to Life
paconsulting.com

Introduction to Lockdown Unlocked

When the UK moved into lockdown in March 2020, life began to change quickly and dramatically. Even now, there remains plenty of uncertainty and volatility for consumers and organisations to navigate.

To help organisations through this time, our consumer insight and analytics team at Sparkler, part of PA, embarked on Lockdown Unlocked – a consumer research study that provides deep, real-time insight into how people across the UK are feeling, thinking and behaving.

By focusing each week on a different aspect of consumers' lives, Lockdown Unlocked has built a detailed and future-facing picture of the potential challenges and opportunities for B2C organisations and teams.



Our approach

Lockdown Unlocked combines the richness of qualitative insight with the rigour of weekly quantitative tracking to uncover unique insights.



An online community

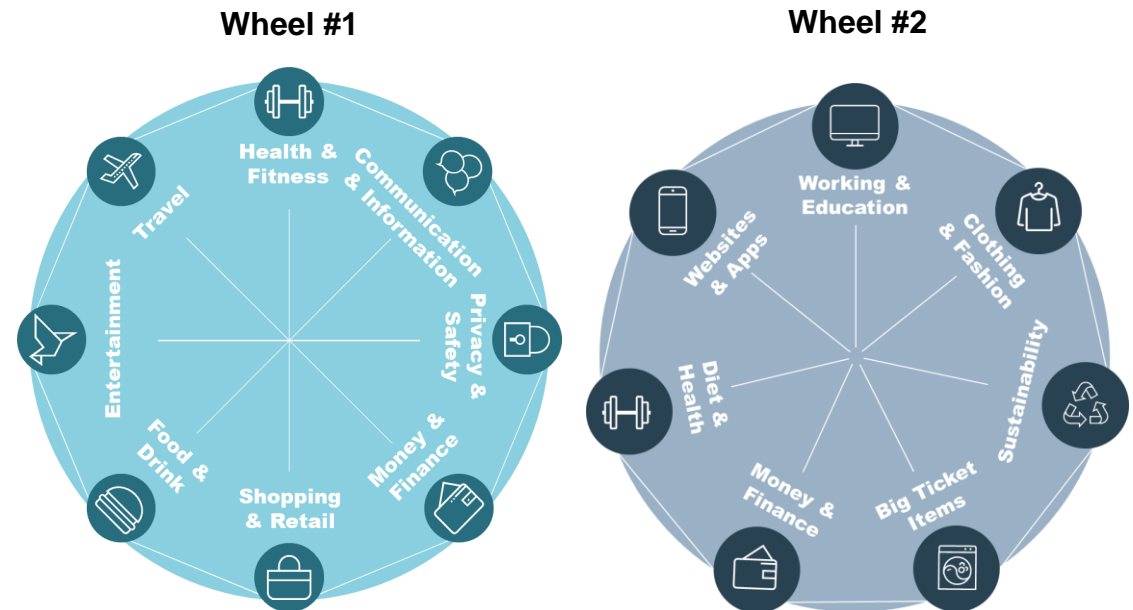
Every week, we speak to 40 people representing a range of ages, locations and backgrounds through an online platform. Participants answer a variety of open-ended questions, tasks and activities via text, videos and photos.



A quantitative tracking survey

In parallel, we run a quantitative survey every week with a nationally representative sample of 1,000 people. The survey and online community focus on the same topics, but the survey also tracks certain measures over time to show how the nation's mood and sentiment is changing.

Each week, Lockdown Unlocked explores an aspect of consumers' lives from our Wheel of Life frameworks.



A summary of our findings

Difference

As COVID-19 affects us all, it can be easy to assume it has a universal impact on everyone. But our study shows that's not true. Certain consumer groups, like 18-34s and Londoners, have experienced more change and have adopted more lockdown-specific behaviours than the rest of the nation. And while it's easy to visualise a nation of home workers in lockdown, less than a third of UK people are working from home.

It's clear that opinions and experiences of the COVID-19 lockdown aren't homogenous and that **different groups have experienced varied levels of disruption to their lives.**

Control

People remain afraid of a second wave of COVID-19 and have long-term uncertainty over their financial futures. These fears have upweighted the consumer need for control.

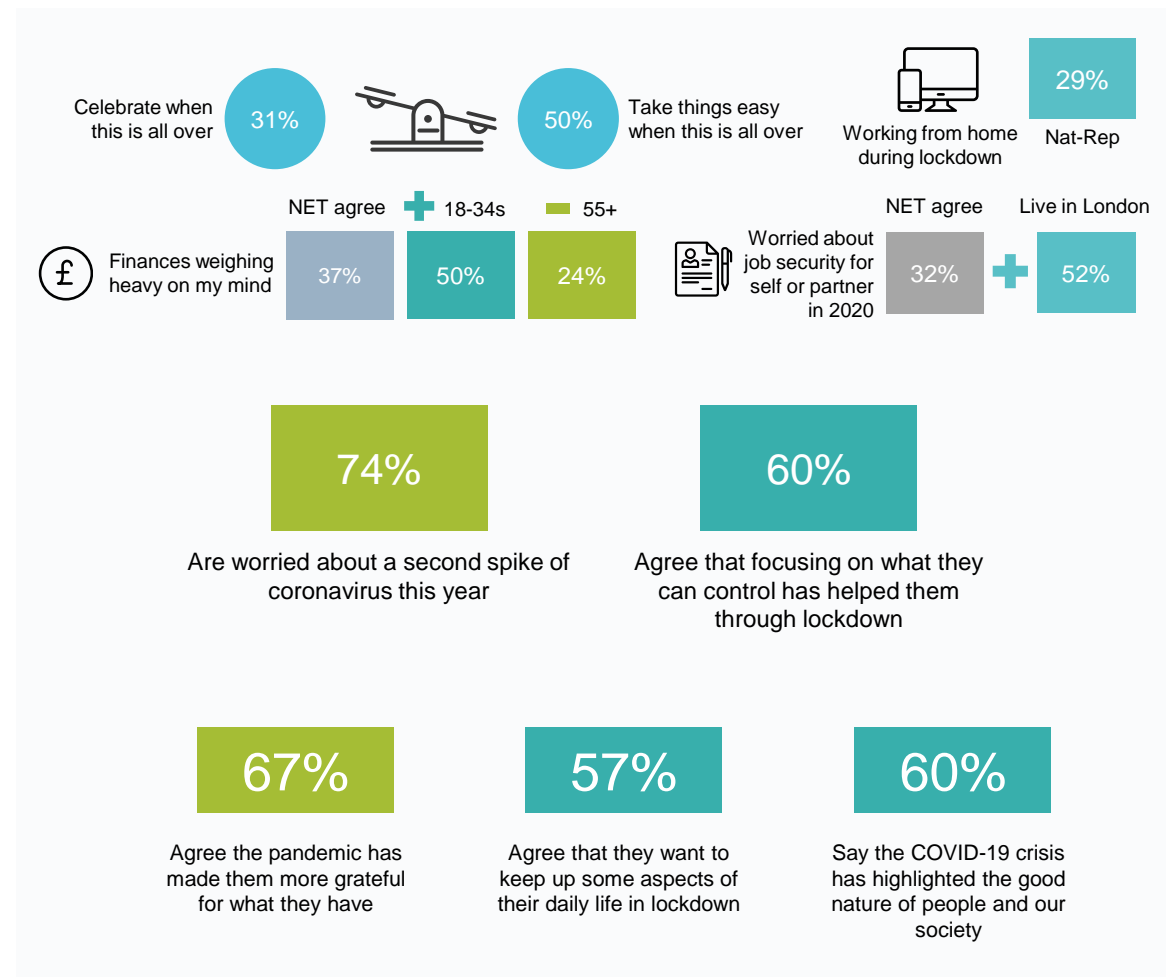
As the UK emerges from lockdown, control will be key in driving choice and behaviour as we begin to navigate our new reality. **Providing consumers with more control over the experiences and interactions they have is likely to win in 2020.**

Intentions

The COVID-19 lockdown has caused people to reflect and think differently about what they really need and value, how they spend their time, and the companies they care about.

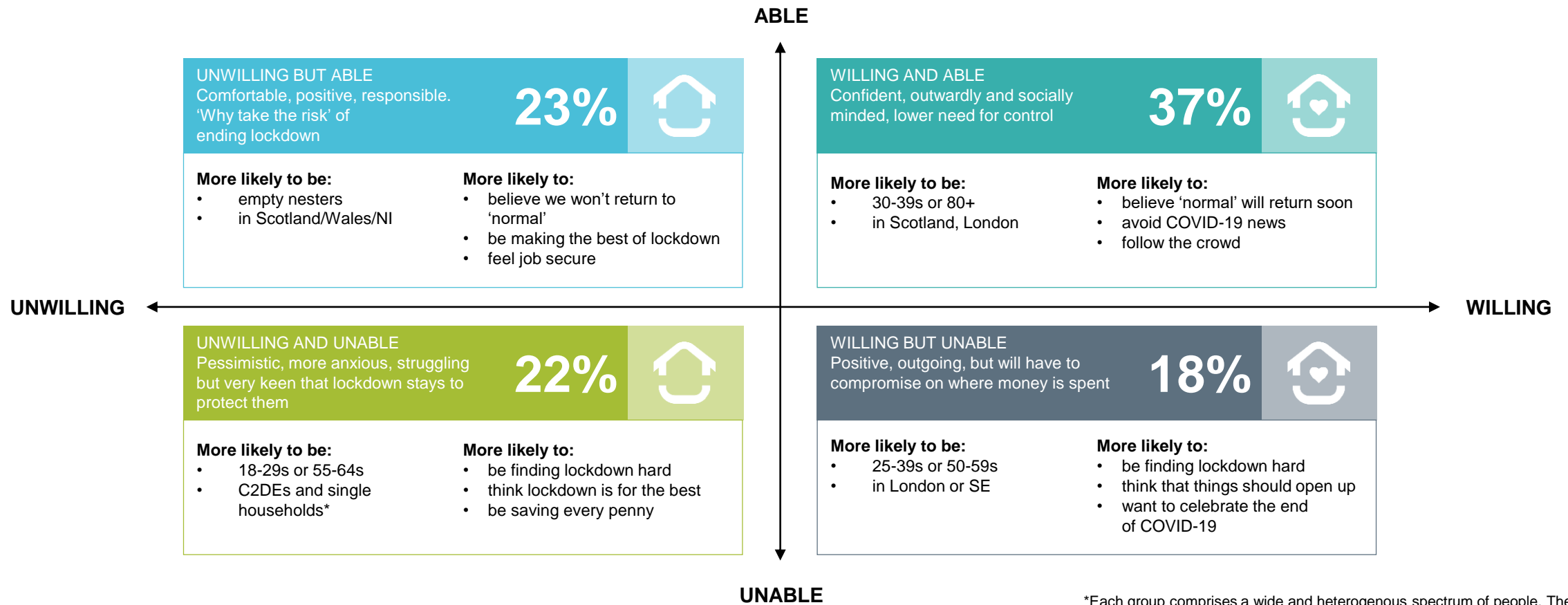
People have made positive changes to their health and fitness habits, feel more grateful for what they have in life and believe COVID-19 has shown the good nature of people and society.

People want to maintain the positive changes they've made to their lifestyles longer term, but whether people's good intentions will stick is unclear. What is clear is that **consumers expect organisations to respond to their shifting attitudes and mindsets, and provide real solutions that can help them achieve their intentions.**



The Willing and Able Matrix: Our framework for identifying future opportunities

When measuring people's willingness to venture back into society and their ability to spend, the UK splits into four groups with differing attitudes and motivations.



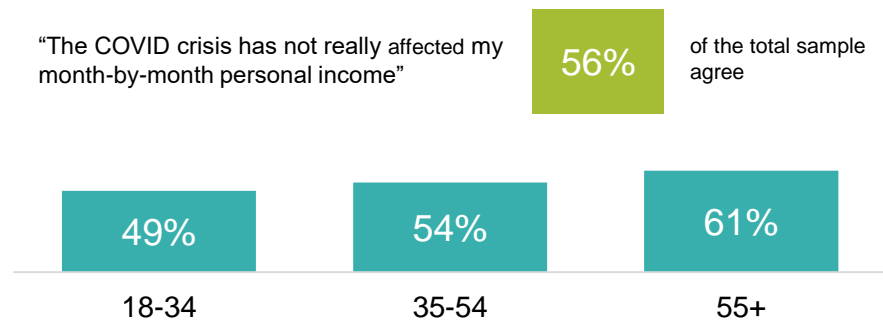
*Each group comprises a wide and heterogenous spectrum of people. The stated demographic skews only indicate notable over indexes.

Money and finance

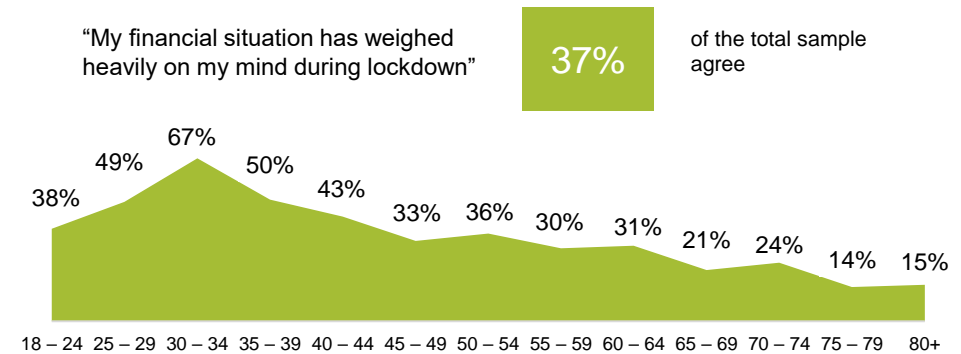


With constant talk of furloughed staff and at-risk companies, it's easy to assume lockdown has devastated people's finances. Yet more than half of people say their income is unaffected. Nevertheless, it's clear that younger people are feeling the impact – particularly those in their twenties and thirties.

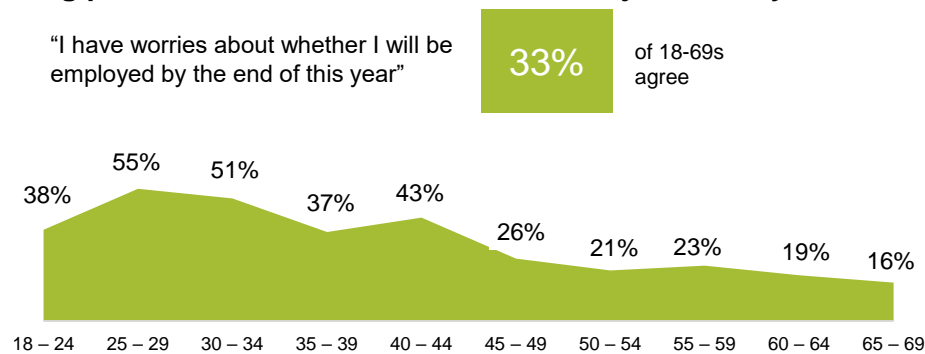
During peak lockdown in late April, most said their incomes were stable



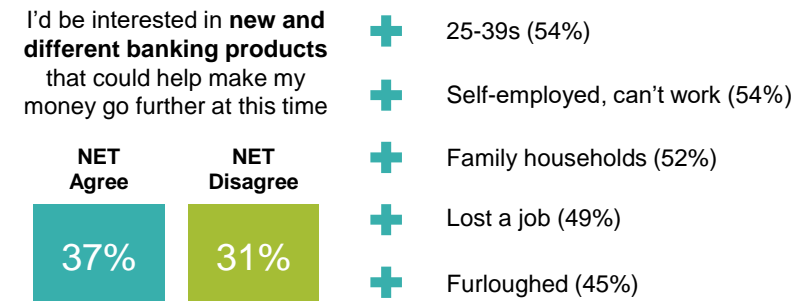
Financial worries are most prominent amongst young professionals



Young professionals have the most fear over job security



Many people are now open to innovative banking solutions to help their money go further



Shopping and retail



#1 Lockdown has caused people to stick to familiar retailers, not discover new ones

18%

Less than 1 in 5 people said they had tried an online retailer they hadn't used before during lockdown

'I have definitely been sticking to Amazon more than usual... it has been my sole source of entertainment products.'

#2 People are more understanding of service gaps and disruption to retailers

72%

Almost three-quarters are more accepting of deliveries taking a little longer and not being perfect

'Some companies are limiting orders to protect workers and delivery times have been longer, which is understandable. They have been transparent, which is helpful.'

#3 People miss in-store shopping experiences, but are nervous about returning

61%

Miss the experience of being able to go to shops

65%

Are nervous about the safety of going to shops

'Physically going into the shops I absolutely hate now. It pushes my anxiety off the scale as I find it very stressful protecting myself and wanting to protect my family as well.'

#4 Not everyone has switched to online shopping while physical shops have been shut

43%

Only 4 in 10 people agree that lockdown has brought home how easy and quick shopping online is vs. shopping in person

'We actually shop for four households on our street... those who are a bit more vulnerable because they can't get out themselves and they don't really order online.'

#5 Young people have been buying more things that make them happy during this time

52%

Over half of 18-34s say they're buying more things that make them happy during lockdown

'I am happy with the wee presents I have bought for those around me - wee daft things off of Etsy and the like - just to give people a wee pick-up.'

Travel and transport



#1 COVID-19 has caused reticence towards public transport

65%

Two-thirds of people say they will be avoiding public transport until COVID-19 is gone

‘I will not be using train services for the foreseeable future. You have no control over others who may also be using these services.’

#2 Modes of transport that provide control could be favoured in 2020

64%

Two-thirds of people feel the only safe way to travel long distances in 2020 is by car

‘We will probably feel safer utilising our own car in the near future as a way of controlling our own environment.’

#3 Many are hesitant about travelling abroad by plane in the near future

63%

6 in 10 people say they would be too scared to board a plane currently

‘It's going to be at least until next Summer before I will go on a plane and I will take wipes for the tray and head rests. I will wear a mask and gloves and will dispose of clothes on arrival.’

#4 But not everyone's nervous, there is demand out there for foreign travel

28%

Nearly 3 in 10 say that booking a holiday abroad is high on their list of post-lockdown priorities

‘If holidays are allowed, I will go. I won't worry any more than I would about holidaying in this country.’

#5 Holidaying is likely to be closer to home in 2020

56%

More than 5 in 10 agree that in 2020 they will be more likely to go on holidays in the UK

‘I don't think I will get on a plane for a while, I think we'd be more likely to have holidays in the UK or drive to somewhere in Europe.’

#6 People will be seeking more control over their holiday experiences in 2020

‘We would almost certainly choose self-catering options over a hotel now, either at home or abroad, simply because you have an element of control over your own immediate environment.’

‘We normally stay in all-inclusive hotels, but will be looking at villas in the future. I can't imagine being crowded round a packed pool.’

Diet and health



#1 As lockdown eases, there are differing views about personal health

31%

Nearly a third agree they're less concerned about their health now than they were at the start of lockdown

40%

While, two in five disagree they're now less concerned about their health than they were at the start of lockdown

#2 Lockdown has taken its toll on many young people's mental wellbeing

51%

Over half of 18-34s feel that lockdown has had a **negative effect** on their mental health

'I would say my mental health has definitely deteriorated. I feel concerned about what challenges I might face going forward and trying to see the positives.'

#3 As lockdown has gone on, people have slipped into bad diet and health habits

40%

'I have put on weight since the beginning of lockdown.'

38%

'The longer lockdown has gone on, the **less exercise I've been doing.**'

#4 People have good intentions to keep up new health & fitness routines

40%

Two-fifths say they plan to **continue the exercise routines** they've started during lockdown

'The home gym will definitely be staying; it's great to do and I will keep up with the yoga too.'

#5 Alcohol consumption has increased for a quarter of the UK

24%

A quarter say they've been drinking more alcohol during lockdown

'When the lockdown first started, I was drinking a lot more wine than I was used to.'

#6 People miss restaurants, but are hesitant about returning soon

#1

Eating out at **restaurants ranked joint highest as most missed activity**

56%

Disagree that If restaurants were **open tomorrow**, they would go to one

Clothing and fashion



#1 We care less how we dress in lockdown due to fewer social occasions

52%

Agree they care less about what they wear at the moment

‘With no real reason to be investing in new clothes now, it would be silly to spend money, I shouldn’t be spending on stuff like that.’

#2 Shopping in person still feels risky, although people miss the high street

56%

Agree they are not prepared to risk going to a clothing store at the moment when they can shop online

‘I’m not scared but I want to help save the nation from more deaths. I will only go to clothes and accessories shops if I absolutely need the item.’

#3 Restrictions to clothing stores are a barrier for many

47%

Agree they are not interested in shopping in store until they can easily try on clothes

‘The thought of queueing puts me off mainly, I can’t think of anything I need badly enough to go through that experience yet.’

#4 Pockets of people are still spending on certain fashion items

26%

Agree they have bought new clothing, footwear or fashion accessories as pick-me-ups during lockdown

‘After a while, I realised it was impacting on how I felt about myself, and I thought ‘buck yourself up’. I’ve started thinking about nice-looking but comfy clothes I could wear for work.’

#5 Bargains and sales may be pivotal in driving reengagement with fashion

50%

Agreed they will be looking to take advantage of bargains/discounts on clothes after lockdown

‘I went to Primark as I was expecting there to be sales as I thought they would have stock to shift... but there weren’t really!’

#6 Masks, zoom outfits, and pared back wardrobes are emerging behaviours

33%

A third of those working from home agreed they’re more concerned with how they dress the top half of their bodies than the bottom

24%

Agreed they could see their look or style changing significantly as a result of being in lockdown

Entertainment



#1 There's greater reliance on entertainment in the home

56%

Feel closer to the entertainment services that have helped them through lockdown

'My days are very much like Groundhog Day in that my daily routine doesn't vary very much at all, so it is good to have something to look forward to entertainment-wise.'

#2 Young people's entertainment habits are shifting the most

57%

Of 18-34s say they would have been lost without streaming services during lockdown

49%

Of 18-34s say they are finding they are more engaged when they watch and listen to things

#3 We are craving escapism from our entertainment choices

67%

Agree they prefer to watch things that provide an escape from the current situation

'I watch mainly horrors and thrillers. I would say it's more immersive viewing, maybe to lose myself in?'

#4 Entertainment that brings people together has become more important

63%

Of family households agree choosing something that can bring the whole household together has become more important

'We have also had a few interactive snakes and ladders sessions with the grandchildren and taken part in an interactive radio quiz with my daughter and hubby.'

#5 Gaming has filled a gap for many, especially for 18-24s

49%

Of 18-24s agree gaming has become much more important to them as they fill the void left by other things

'Gaming at the moment is basically like a little win for each day... it also helps me stay in contact with my brother as we can game together.'

#6 Parents are loosening rules and purse strings

61%

Of parents agree during lockdown their household has become more relaxed about the amount of time that can be spent on screens

'The girls are obsessed with Fortnite, which they want to spend hours on. They're speaking to people and making new friends, which is positive.'

Websites and apps



#1 There's increased digital engagement, with more time spent on apps and devices

50%

Agree they're using screens and digital devices for a broader set of things than before lockdown

'Rather than spend maybe half an hour looking for cushions, I probably spend three days! Going backwards and forwards deciding which are best.'

#2 People are seeking services that are secure and trustworthy

72%

Agree it's more important than ever that the websites and apps they're using are trustworthy

'I think it is really important to know if a site is trustworthy, especially with so much fake news going around.'

#3 The function of digital services is more important than their form at this time

46%

Agree that during COVID-19 they are less bothered about what an app or website looks like, it just needs to work

48%

Almost half aren't interested in browsing – they just want to buy what they want quickly and simply

#4 Any service changes due to COVID-19 need to be clearly communicated

44%

Agree the most important thing a company's website or app needs to do is tell them how their service has changed

'Most of the websites, brands and companies that I use have sent helpful email updates to me... even my barber shop.'

#5 Digital and tech innovations are expected to help life return to normal

51%

Agree technology will play a big role in reducing the risk of a second wave and helping us get back to normal

'I'm sure digital will play a big part in our return. More online booking, tracing apps etc. Plus we shouldn't need to travel so much with new tech becoming available.'

#6 Older age groups aren't necessarily feeling they need help with tech

As so many things have moved online during lockdown, I'm **worried I'm being left behind.**

52%

Disagree

+

62% of 60-69s

Disagree

Technology in the home



#1 Reliance on tech has grown even stronger in lockdown

44%

Agree that in times like these, TVs and other home technology products are things worth investing in

‘I’m relying on my phone for everything during lockdown! I would be lost without it, it’s my only form of communication.’

#2 Video calling has played a vital role in work and social lives

49%

Agree lockdown has made them realise that video calling is a great way to keep in touch, and they plan to continue it even when lockdown ends

‘I have been using Zoom, Microsoft Teams and Houseparty, this is for a variety of reasons namely meeting at work, family meetings, and contact with friends.’

#3 Tech has risen to the challenge and met most people’s expectations

72%

Agree their home broadband has been sufficient for their needs in lockdown

‘I didn’t find any particular difficulty working from home. My PC was strong enough to support different programs and connection was fine.’

#4 Families and those home working have experienced more challenges

30%

Of families agree making sure they have enough screens and devices to keep the household occupied has been a challenge

‘With all the family at home, it has been challenging to all use the Wi-Fi at the same time.’

#5 There are more concerns around tech and privacy during lockdown

30%

Nearly a third agree they have more worries around the privacy and security of their online data since lockdown

‘Banks, EasyJet, scams... yes I am very aware, and do consider this is more prominent than ever before. I am becoming wary of giving any bank details over the internet for purchases.’

#6 Some increased reliance on tech may be here to stay

58%

Of those working from home agree now they have used tech to do so intensively, they will definitely be looking to work remotely more often in the future.

‘Technology has definitely thrown questions at businesses as to whether employees actually need to physically be at work.’

Our consumer insight and analytics expertise



Panels and communities

We deliver unique access to groups of consumers, harnessing the power of digital communications to uncover robust, representative insights. We pride ourselves on combining top drawer account handling with the best quantitative and qualitative research skills.



Research and insight

We build powerful understanding of people's attitudes and behaviours in the digital world, including how they relate to technology, brands and each other. This work spans a host of project types, from consumer segmentation and customer experience to creative development and co-creation.



Service innovation

We create new service experiences and refine existing ones, from apps to fulfilment to stores. And we do it all with consumer insight at the fore. Specifically, this involves hi-res 'shopalongs', service development clinics, concept clinics and service evaluations.



Brand strategy

We produce clear and inspiring strategies for growth – ideas and plans that help them flourish in the changing marketing environment of the digital age. We're defiantly digital and focus on identifying a brand's purpose, character and activation.

Get in touch

Over the past few months, Lockdown Unlocked has played a hugely valuable role in helping organisations understand the changing consumer landscape and consider how best to respond to the pandemic.

As the UK learns to live with the virus, our study will continue to examine different areas of people's lives and provide fresh insights into the evolving attitudes, behaviours and needs of the nation.

If you're interested in learning more about the study or how it can help you and your clients then please reach out – we'd love to hear from you.

Read more:

www.paconsulting.com/lockdownunlocked



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About PA

We believe in the power of ingenuity to build a positive human future in a technology-driven world.

As strategies, technologies and innovation collide, we create opportunity from complexity.

Our diverse teams of experts combine innovative thinking and breakthrough use of technologies to progress further, faster. Our clients adapt and transform, and together we achieve enduring results.

An innovation and transformation consultancy, we are over 3,200 specialists in consumer, defence and security, energy and utilities, financial services, government, health and life sciences, manufacturing, and transport. Our people are strategists, innovators, designers, consultants, digital experts, scientists, engineers and technologists. We operate globally from offices across the UK, US, Europe, and the Nordics.

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