



Shaping Ireland's Future

Report 1: Retail

Topline report

It's all change when it comes to shopper behaviour

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As Ireland slowly emerges from lockdown, we at B&A will be looking at the challenges and opportunities faced by key sectors in the economy.

First stop. Retail.

Covering the **grocery sector**, which has made significant adjustments with impressive speed and prevailed throughout.

And **non-essential retail**, re-opening for business now.

It's all change for retail. Our data shows that **32%** have switched their main grocery store since Lockdown began and a massive **69%** have switched the time of day when they shop. But where do the opportunities lie for retailers and brands?

Read on for more details.

We've identified 5 key opportunity areas for the retail sector:



REIGNITE THE LOVE



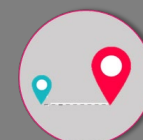
CAPITALISE IN ONLINE INTEREST



THINK LOCAL



GET INTO THE INNER CIRCLE



MASTER THE JOURNEY

Opportunity 1: Reignite the love



REIGNITE THE
LOVE

Our grocery shopping experiences have become much more functional, efficient and less enjoyable in the post-Covid era.

With speed and safety top of mind it's all about getting 'in and out' as fast as we can:



Are making lists before shopping



Have been put off grocery shopping because of the queuing



Find it impossible to browse



No longer enjoy the shopping experience

The current conditions mean that many of the more emotional needs grocery delivered have been de-prioritised:

Discovery.

Connection
with others.

Novelty.

Inspiration.

Sensorial
stimulation.

Charity.



I used to love browsing in the fruit & veg section, bakery, but now it's so much less appetising because everything's wrapped and trussed up.

Shopper, Dublin

Opportunity 2: Capitalise in online interest



CAPITALISE IN
ONLINE INTEREST

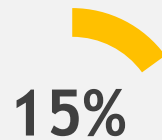
As the supermarket became a more anxious and less engaging place to be during lockdown, more and more of us are looking into online and remote options

While,



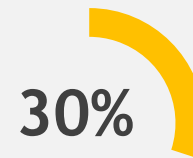
Of shoppers nominate online as their **main grocery channel**

And,



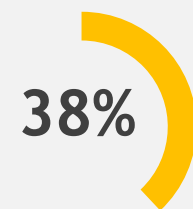
Say they will **definitely** shop online in the next month

However,



Attempted to shop for grocery online during the crisis but were unsuccessful

Additionally,



Are interested in **click and collect** options

There are clear opportunities to streamline and improve the online grocery experience to engage more and more shoppers.

If in-store remains a more functional experience in the longer term, it may be online that takes on the mantle of emotionally engaging and inspiring shoppers.

Opportunity 3: Think local



THINK LOCAL

During lockdown we re-connected with our local communities and re-discovered local shopping options.

From specialist food, to pharmacy and now as non-essential retail opens, we're thinking 'local' first.

Among those who switched grocery store, a third did so to stay closer to home.



And even as travel restrictions lift, focusing on local for the foreseeable seems like a win/win situation for shoppers.

We want to support local business in tough times and keep our local areas thriving.

Our experience with local providers has opened our eyes to the quality people like (particularly local butchers/bakery).

We've become used to the more personalised and friendly service that local options often deliver.

Staying local eliminates the need to take risks on public transport.

With most of us still working from home, shopping local allows us to fit trips in at a time that best suits us.



Lockdown was a revelation for us, we reconnected with so many old customers from the area who'd fallen away. We picked up so many new ones who were shopping in different ways. Finally, local places are being appreciated, it's great.

Family butchers, Dublin

Opportunity 4: Get into the inner circle



GET INTO THE
INNER CIRCLE



Irish shoppers are now likely to be focused on a smaller number of 'inner circle' retail brands.



During lockdown, grocery shopping behaviour shifted from multiple shops to one 'big' grocery shop.



As non-essential retail opened up, we focused on the one or two shops we **really** missed.



Going forward, queuing and logistics make it likely that we'll prioritise the stores that really matter to us.



Penneys was on my mind throughout lockdown. I used to shop in loads of places, but Penneys was the only one I really missed.

Shopper, Dublin

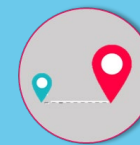


I went into town on Tuesday but with all the queuing I won't be doing that again or even going to that many shops. They'll have to be worth it.

Shopper, Dublin

Those stores that deliver strongly to a range of requirements and needs stand the best chance of keeping top of mind with customers (e.g. Penney's, BTs, Tesco Extra, Discounters)

Opportunity 5: Master the journey



**MASTER THE
JOURNEY**



The Covid-19 crisis radically disrupted our habitual purchasing behaviour. How, when, where, why we shop is all in a state of flux.

When it comes to engaging consumers anew, everything is up for grabs

Customer routines are malleable

Touchpoints for interaction will be different and we will need to work together in new ways

Many needs are being under met right now and thought must go into how that can be addressed

It may be beneficial to repurpose the role and purpose of various channels

Retailers should be using design principles to 'choreograph' fluid movement through the store and creating 'safe spaces' for limited browsing

Clear, direct communication has never been more important

69% have switched the time of day when they shop. The focus on weekend and evening shopping is greatly diminished.



Certainly, there's a lot to be done to make the store 'space' work better for us. We made the changes in such a hurry, but when there's time, that's a key thing to look at.

Manager, Large Supermarket



I wish the supermarkets could be more proactive in communicating their busy and less busy times, so I could plan around that.

Shopper, Dublin

Opportunities for all 5 key areas

Ways to win

- Now that we're past the initial adjustment period, the focus should be on ways to mitigate the most challenging aspects of our new shopping experiences (for example, the queue)
- It's important to utilise other channels beyond in-store to inspire and engage emotionally with customers
 - ❖ Website, social media channels even getting 'back to basics' with postal channels.
- Developing an online offering will be very important going forward.
- Whether that's part of the brand offering or outsourced to a third party.
- There are various functional basics to get right (which are all challenging enough in and of themselves).
- There's also a huge amount the grocery sector in particular can learn from other retail categories (fashion/gifts/homeware) in making the online channel inspiring and engaging rather than merely functional.
- Understanding and focusing on the specific needs of your local community is a good strategy right now. If you don't know what these are, find out. Consumer research will help.
- Encourage word of mouth, it's a powerful motivator and seems to be doing a lot to promote local businesses among neighbours at the minute.
- Be clear about what your brand can uniquely offer your customers and communicate this single-mindedly across all channels. It's never been more important to know exactly who you are and what you deliver.
- Think about how you can expand the range of needs you deliver to, to make your brand even more 'worth it' for customers. We're seeing this happening already with supermarkets moving into 'ready to go' food with things like pizza and ready meals.
- A useful exercise may be to map typical customer journeys both pre and post the Covid crisis. At B&A our Shopper Pathway methodologies can help you do that.
- What has changed? What touchpoints or channels are more important? Less important? What needs are under-fulfilled at the minute? How can channels be upweighted or down-weighted to plug those gaps?
- Many businesses would benefit from the skills of designers and architects to help design the layout and flow of the store better for the current times.



About B&A



- B&A is Ireland's largest and most experienced independently owned research company.
- We pride ourselves on having the most experienced director team in Ireland.
- Established over 30 years ago, Behaviour and Attitudes provides a full range of market research services, ranging from CAPI, CATI, online and of course qualitative.
- Specialist sectors include: Retail & Shopper, Technology & Telecoms, Media, Financial, Political & Social, Automotive, Healthcare and Public Sector & Utilities.

For more information please visit our website at:
www.banda.ie or contact us on +353 1 2057500



*Marketing Society Research Excellence Awards
25 time award winners, including 5 Grand Prix
in 11 years.*



B&A research services during Covid-19



B&A Online Omnibus Survey

A twice monthly omnibus survey amongst a representative sample of 1,000 adults aged 16 years plus. Surveys costed on a per Question Unit basis.



Online Forums

Collaborative virtual discussion space where we interact with participants over a 3-5 day period. Respondents can be shown stimulus, asked to comment on various topics and material and probed on their answers. Respondents can comment on each other's answers and react, build, question.



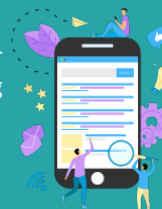
B&A online Acumen Panel service

Access to the full breadth of ad hoc quantitative research applications, via our online panel of 30,000 + consumers. From fully representative nationwide surveys, to smaller surveys amongst niche markets and audiences.



Online digital ethnography

Respondents use mobile devices to answer our questions and show us their world. We have our own digital ethnography app for this purpose, allowing respondents to capture answers to our questions in the form of video, photos and text responses. Our moderators are on hand to follow up 24/7, probing for more info, clarifying points and setting new challenges.



B&A Online Client/Customer Surveys

Gauge accurate and timely feedback from your own customer base by way of carefully designed CEX, Communications, Client needs etc surveys. All conducted to the highest levels of GDPR compliance.



Virtual depth interviews

In depth interviews with research participants, conducted in the comfort of own homes. We use a variety of platforms such as Skype, Zoom, Teams to talk to participants easily, watch their non verbal response, show stimulus and interact on a personal level.



B&A Telephone Unit

B&A continues to provide a full suite of Consumer and Business to Business Telephone research applications through our panel of CATI-at-Home interviewers across the country.



Online Web Journey

In-depth interviews with research participants, conducted in the comfort of own homes. We use a variety of platforms such as Skype, Zoom, Teams to talk to participants easily, watch their non verbal response, show stimulus and interact on a personal level.



Virtual Focus groups

Focus groups conducted via an online platform that respondents log on to. Fully audio and visually enabled allowing us to moderate via camera, interact with respondents in real time, show all manner of stimulus and interactive tools and observe their responses at first hand.



Remote Shopper Journey

B&A has a great deal of experience in 'shopper pathways' research. This uses technology to access a shopper experience in the moment. The respondent is unaccompanied but is wearing glasses that records the trip while they explain their selection. We then re-run the video with them in order to delve deeper into their thinking, reaction to display, pricing, branding and more. This provides a remote means of accessing shopper journeys which is extremely important in the current Covid environment.



For further information contact any of our senior research team: elaine@banda.ie, maggie@banda.ie, niall.brennan@banda.ie