



LOOKING BEYOND LOCKDOWN

CHANGING CONSUMER BEHAVIOUR IN RESPONSE TO COVID-19

O *VERVIEW*

We're living through unprecedented times and we're all looking to make sense of our new normal.

Remnants of the current global health crisis will linger long after the immediate threat subsides and there are signs that new behaviours, many of which are positive, will be ushered forward.





METHODOLOGY

Online interviews with proprietary communities

2500+ Condé Nast Britain consumers

All data taken from Condé Nast Britain Covid-19 Survey, May 2020

Despite extraordinarily challenging times, UK consumers
are facing the future with a sense of hope...



#1

Hopeful is the *leading emotion*
used to describe current state of
mind, with *optimistic* in
second place

75%

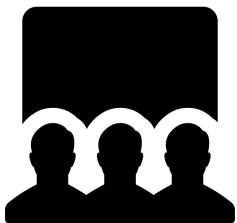
are likely or extremely likely
to carry on spending as
normal



91%

believe the UK will return to
normal by 2021,
if not sooner

... and are looking to media companies for entertainment, information and crucial escapism.

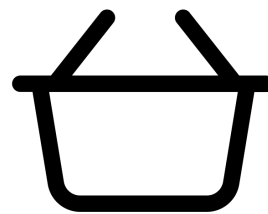


90%

are not opposed to advertising going ahead at this time

#1

Positivity is the leading thing people want to see from media companies



81%

plan to spend the same or more online in the next six months

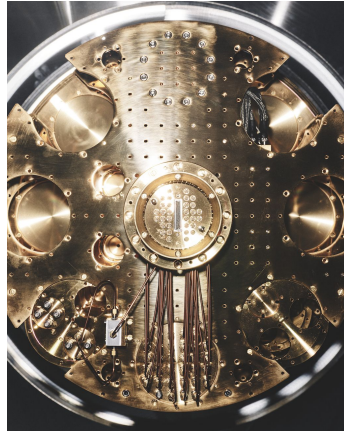
MEDIA MOGULS



VIRTUAL BECOMES REALITY



BRAND BUILDING



PHILANTHROPY & ME



REVENGE SPENDING



“FIRST TIME” PARADIGM



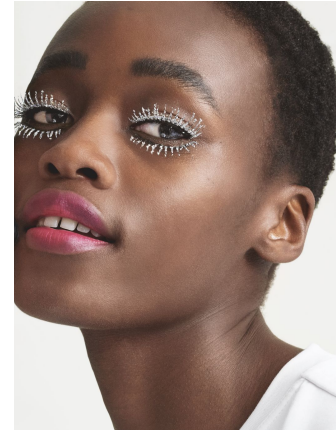
HOME SWEET HOME



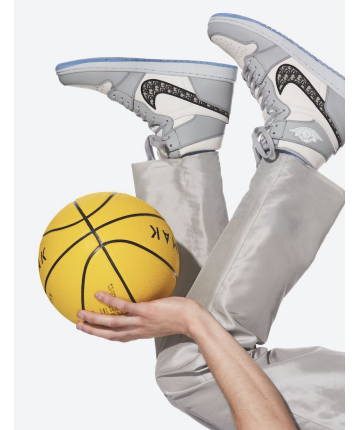
LOUNGING AROUND



THE LIPSTICK EFFECT



REAL HEALTH



MEDIA MOGULS

Technology is the conduit for a sense of normality as we adapt to a new way of remote living. The pervasive connectivity now infiltrating our homes has been of benefit to online media, as constant fresh content now lies only a new tab away. Specialist media sites act as coach, mentor and friend as many attempt new things, such as baking or dancing, and turn online for guidance. Others rediscover and delight in traditional media, including print magazines, to offset the information overload and escape the amplified 'always-on' state of mind. Beyond providing a sanctuary, the media offers a vital service at this time and consumption is high, as people look to stay ahead of the latest updates and advice on a fast-moving public health crisis.

87%

have maintained or increased their use of social media

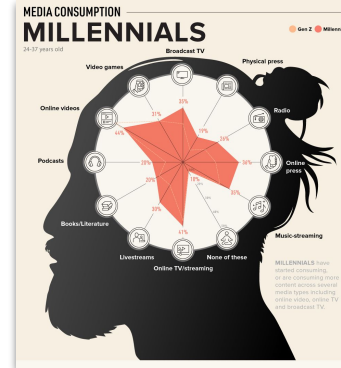
73%

have maintained or increased their use of print media

88%

have maintained or increased their time with online media websites

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VIRTUAL BECOMES REALITY

Not only is virtual becoming the reality for many industries, but virtual is becoming lucrative for some in entertainment and education. While a pivot to virtual events has impacted ticket prices and revenue, consumer uptake is high and sponsorship opportunities abound. At-home theatre and cinema screenings, as well as conferences, seminars and workshops, were the most consumed virtual experiences in the past six weeks. The virtual Met Gala, held in early May, reportedly generated [€22.79M in earned media value](#), as the Gala was given new life with Vogue's YouTube livestream 'A Moment With the Met'. Facing the reality that packed theatres and auditoriums likely won't be returning this year, would-be spectators are coming to terms with the prospect of paying for virtual cultural stimulation.

92%

have engaged with a virtual seminar and/or performance in recent weeks

75%

plan to maintain or increase their spending on in-home entertainment in the next 12 months

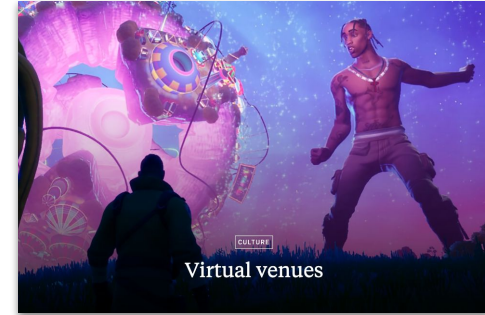
38%

plan to engage in virtual workshops in the next 6 months

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National Theatre at Home schedule:
How to watch the free live screenings online

It's the turn of Antony and Cleopatra as the National Theatre's free screenings continue.



EARNING TRUST

WITH RACHEL BOTSMAN

EVENTS.
VIRTUAL



BRAND BUILDING

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As fantasy temporarily makes way for pragmatism, brands across the spectrum are prioritising being there for their consumers and community. Using this time to build connections beyond transactions is imperative, laying the groundwork for when necessity will once again make way for aspiration. Flashbulb theory, which suggests memory is especially vivid in times of crisis, means that brand encounters are especially salient right now. Branded goods might feel as if they are on the backburner, but people will remember the household names that shared their values during this time of mass reflection and scrutiny.

82%

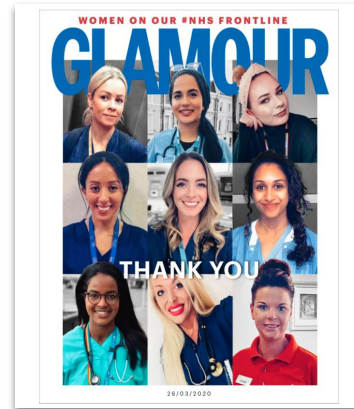
are likely to support businesses that are "giving back" by spending with them

1/4

are looking for more information around ecotourism and positive stories of travel companies supporting the crisis

62%

want to read and watch things that are informative at this moment in time



PHILANTHROPY & ME

If there's been one silver lining in recent months, it's the compassion and goodwill of the people. A sense of community is galvanising the nation and those who can afford to are giving back financially where they can, as small and local businesses bear the brunt of the impending recession. Public acts of philanthropy, such as those shared through social media, also allow some to maintain a level of self-broadcasting that's been lost without the ability to share our usual experiences, such as travel. Right now, one of the most powerful status symbols is embracing one's civic responsibility.

73%

are likely to give to charity or fundraise for charity

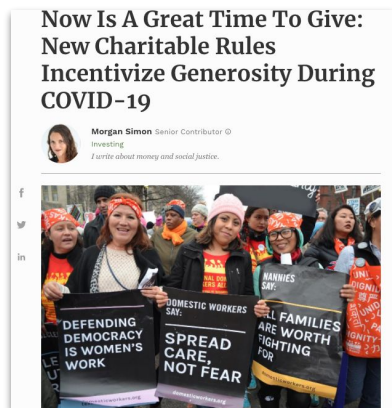
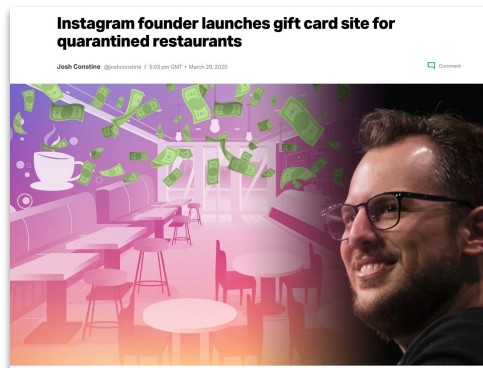
57%

are likely to accept gift vouchers instead of refunds for cancelled events

90%

are likely to support small businesses by spending more with them

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REVENGE SPENDING

Revenge spending describes the surge in sales seen among luxury goods in China after the Covid-19 lockdown restrictions were eased. The immediate rebound witnessed in China echoes the sentiments of retail futurist Doug Stephens, who told the [Business of Fashion](#) that a “brush with mortality manifested in a consumption spike following the events of 9/11”. While a global pandemic hits differently, there is promise in a small but affluent sub-set of consumers. The novel conditions under which many are currently restricted could also see a nation spurred to prioritise feeling back to their normal selves. For some, this self-care will come in the form of grooming or a new wardrobe, and for others it will mean accruing possessions, in lieu of experiences being employed as status symbols for some time to come.

2 in 5

are the same, or better off, financially

87%

plan to return to the high street and shopping centres for leisure once they safely reopen

56%

plan to maintain or increase their spending on beauty and grooming

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THE 'FIRST TIME' PARADIGM

Routines have been upended but it's not that people have stopped doing; they have simply started doing things differently. Pre-pandemic social lives may have been temporarily lost but they've been replaced with a host of new endeavours, which expand the reach of certain sectors and open up niche pockets of interest to a new and captive audience. This 'first time' paradigm is responsible for the exponential growth in 'how to' content and e-learning platforms. Usually, the frequency of 'first times' decreases with age, and customer acquisition opportunities reduce with it. Looking ahead to post-pandemic life, many will persevere with new habits, taking with them the brand loyalty cultivated from those early experiences.

64%

have tried new foods and recipes more in recent weeks

74%

plan to maintain or increase their spending on education and self development

68%

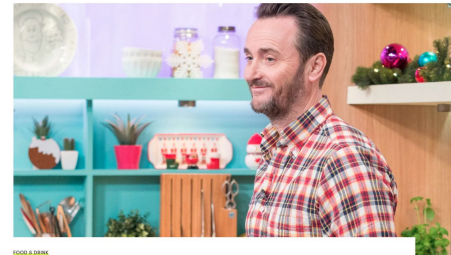
expect to continue cooking at home more post-pandemic

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Have you found a new hobby or skill during the lockdown?

If you've discovered a new interest or developed a new skill in the past few weeks, we'd like to hear from you



Tips on how to perfect cooking while at home, from Jason Atherton

The Language App That's Helping Bored People Get Through The Lockdown

HOME SWEET HOME

At the outbreak of the pandemic, young renters escaped cities for the safety and home comforts of the family nest. Meanwhile, those with second homes relished the opportunity to isolate among nature. With relocation comes an adjustment to a new way of slow living that could have long-term consequences once city life returns, and could even serve as a catalyst for de-urbanisation. Faced with the reality of mortality, some may re-prioritise family and home-making, and brands should ready themselves to speak to this new breed of de-urbanite. Regardless of location, many will re-emerge with a newfound appreciation for the impact our homes have on our state of mind, and choose to invest in the indoors while outdoor freedom remains tentative for the foreseeable. The perceived threat of the outside world could linger, meaning that nurturing our homes as a sanctuary will endure.

46%

who were planning home renovation or redesign are continuing with their plans

2/3

plan to increase or maintain their spending on property

63%

plan to increase or maintain their spending on home interest and furnishings

All images on this page link out to the full example on the source's website. Please click on them to see more.

Gardens bloom under lockdown with record demand for seeds

Seed firms report huge rise in sales with people worldwide turning to gardening as hobby

- Coronavirus - latest updates
- See all our coronavirus coverage



▲ Delphiniums are having a moment in the sun. Photograph: Steffen Hauser/Alamy



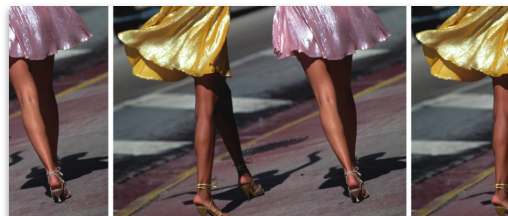
STAYING IN

**The House & Garden team
ruminate on the unexpected
positives of lockdown**

LOUNGING AROUND

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Athleisure, streetwear and 90s-inspired shell suits have become mainstays of catwalks and high streets for the past few years, and now these pieces have been catapulted from divisive fashion statements to ubiquitous necessities for comfort while we're confined to our homes. Anna Wintour, photographed at home by Vogue amid New York's lockdown, in a pair of red sweatpants, was a watershed moment for humble casualwear – and it's one of the most promising category bright spots in apparel. Dubbed the [uniform of the pandemic](#) among those able to work from home, it may become the new uniform full-stop. As Twitter becomes one of the first high-profile companies to announce it will allow its staff to work from home 'forever', Covid-19 could be the impetus for more remote and flexible workforces.



Style
COVID-19 Might Change The Way We Dress Forever
It's proven that historical events such as pandemics and recessions change the way women dress.
BY KRISTEN BATEMAN
APRIL 27, 2020



69%

are now looking for the same or more information on loungewear

77%

of those employed are currently working from home

38%

purchased athleisure or sportswear in recent weeks or plan to in the next 6 months

THE LIPSTICK EFFECT

The lipstick effect is a phenomenon identified by economists that explains the growth of the beauty industry during times of economic crisis. The pattern has been well documented over the years, as gateway luxury goods purchases grow when people seek small indulgences in uncertain times. But Covid-19 presents new challenges and opportunities for beauty. Masks, treatments and bathing rituals benefit from time gained at home and a renewed focus on self-care to offset anxiety. And as many now work or socialise on video, it adds another dimension to the pressure of looking good that we're not used to: looking at yourself staring back at you. Besides, there's still something to be said for the mental health benefits of clinging onto one's pre-coronavirus persona. As [The Atlantic](#) reports, 'stuck inside, people are left with just their existing tools and skills, trying to maintain their sense of self, or at least their eyebrows. With people's faces, so go their identities.'

1/4

who are using more skincare products, expect to continue post-pandemic

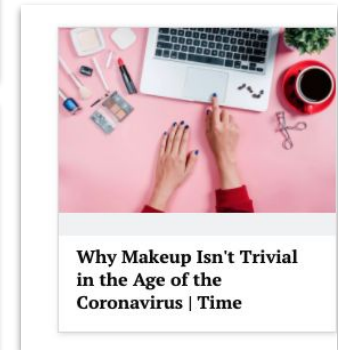
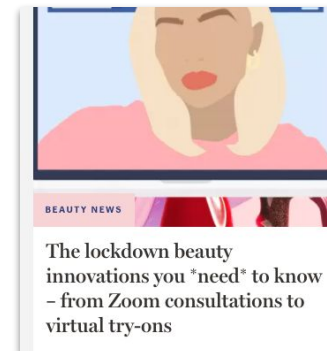
1 in 3

are likely to buy make-up in the next 6 weeks

73%

who are using less make-up expect to revert back to their original habit post-pandemic

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REAL HEALTH

The health and wellness industries have pivoted to become less performative and exploratory in nature during this time, as we see a return of concern for health in its simplest form. Hygiene, diet, exercise and self-medication are all more prevalent and these most mundane aspects of a wellness routine will ride the wave of the Covid-19 pandemic, with hygiene and immune support rituals lasting long after the immediate threat has subsided. Health and wellness is one of the most promising categories for projected spend in the next 12 months, not least in a bid to stave off illness, but as people adapt their living space to accommodate indoor exercise regimes. The ramifications of a pandemic and subsequent social distancing measures have also been a catalyst for the nation to practice self-reflection, with growing anxiety alongside more time spent alone on the horizon.

72%

plan to maintain or increase their spending in health and wellness

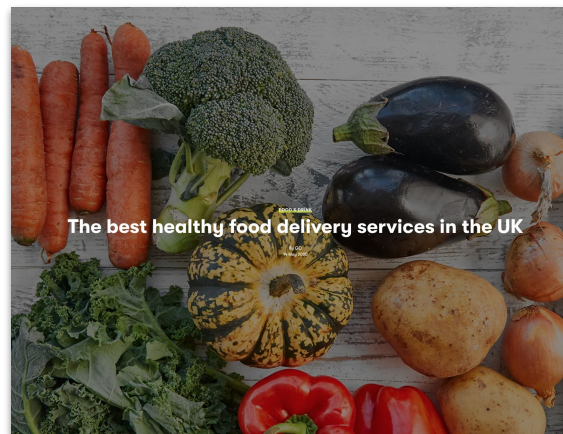
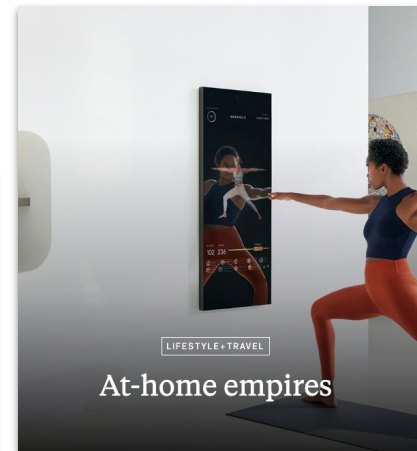
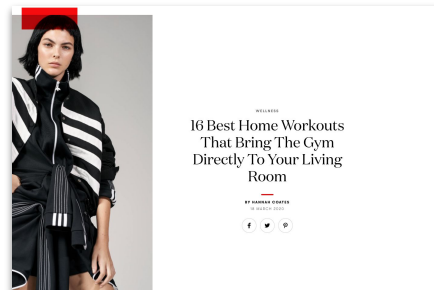
67%

purchased vitamins or supplements recently or plan to

85%

who are now exercising more expect to continue post-pandemic

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7,088 views | May 11, 2020, 09:18am EDT

UK Demand For CBD Products Soars Amid Covid-19 Pandemic

David Prosser Contributor @ Entrepreneurs

While Covid-19 continues to devastate the global economy, there are some businesses for which the pandemic has created opportunities rather than problems. One good example is the UK's nascent market for cannabidiol (CBD) products, where entrepreneurs and small businesses report soaring demand since the crisis began.

Research published today by Alphagreen.io, the UK's largest marketplace for certified CBD products, suggests that more than 8 million Britons are now buying CBD products, with spending exceeding £150m in the first four months of 2020 alone. That puts the market on target to achieve revenues of £450m over the year as a whole, which would represent 50% growth compared to 2019.

T AKEAWAYS



The most effective and inspiring media brands are capturing both the pull of escapism and the compulsion to stay constantly and reliably informed.

While the nation is eager for normality, it shows willingness to adapt to the changing shape of commerce and to invest in new models of consumption and experience.

The rise in 'first-timers' buying into unfamiliar brands, hobbies and behaviours creates scope for customer acquisition and the welcoming of new audiences.

Brand encounters and relationships forged in the early stages of the journey into the unknown will be paramount to cultivating long-term brand loyalty.

Prolonged changes to routine are forcing people to redefine their values. As the world shifts on its axis, new ways of living will conjure new dreams and demand new solutions.



PLEASE CONTACT

[*jamie.rudick@condenast.co.uk*](mailto:jamie.rudick@condenast.co.uk) *Head of Research & Insights, Condé Nast Britain*

FOR MORE INFORMATION