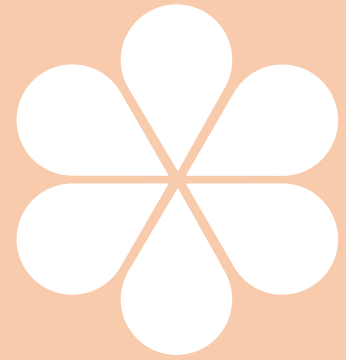


Meet the Lockdown Households

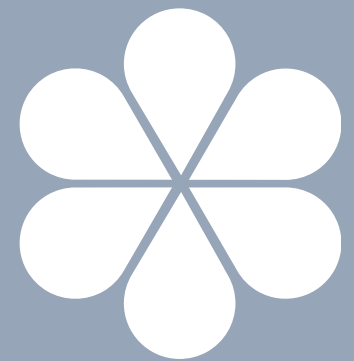


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Category Consultants to
the Food & Drink Industry



Covid-19 is forcing consumers to rapidly change habits. Our consumer tracking survey identifies key insights which can support what you do next.



Methodology

15 minute quantitative research

Sample size of **1000** May 2020

Analysis by Levercliff's in-house experts

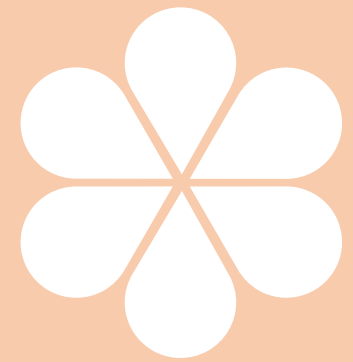
This survey will be repeated in early June 2020.



**May 28th the UK passed 66 days since
lockdown**

It takes 66 days* to form a new habit

* Lally 2009 UCL research



Have your consumers changed their habits?

* Lally 2009 UCL research

The Changing habits of Lockdown Households



The four Lockdown Households

36%



Back to Basics

25%



Financial Worriers

20%



Life on Pause

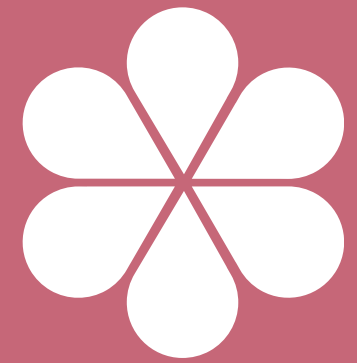
19%



Business as usual



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Meet The **Back to Basics** Households

The Back to basics household (36% of Population)



Back to basic households are varied. Around a third are couples with no kids and a similar proportion are couple households with children.



ABC1
Working full time from home



What they are up to?

**Baking & Cooking
from Scratch**

**Buying fewer
premium/luxury
biscuits or cakes**

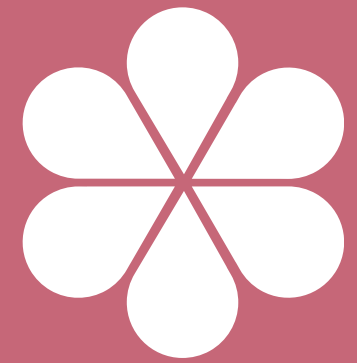
Eating Family Meals

**Buying Healthier
Snacks**

**Looking for Nutritional
Benefits**

**Planning to continue
new habits after
lockdown**

**Buying indulgent
snacks for themselves
(not sharing with kids!)**



Meet The **Financial Worrier** Households

The Financial Worriers household (25% of Population)



60%
are aged
under 45

**Across all
socio economic
groups**

35%
of under 45s in
this segment
have children
at home

Their Worries



Furloughed

Rising Food Prices

Need for Family Food variety

What are they up to?

Buying fewer Premium products

Switching from Brands to Private Label

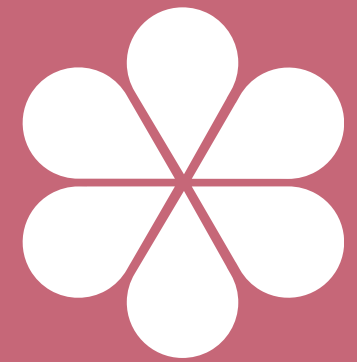
Shopping same or smaller range of shops

Reducing Items in Baskets

Fewer Impulse Purchases

Occasional Self Treat

Price most important factor driving choice



Meet The **Life on Pause** Households

Life on Pause household (20% of Population)



Households with children largest segment. (Over two fifths of households)

Families tend to be younger parent/s under 45 and children aged <11.



Couple households with no children account for just over a quarter. Single person households a fifth.





Waiting for Life to Return to Normal

Fans of convenience foods
and buying more snacks



What are they up to?

Not baking or cooking from scratch more

Less concerned about income changes

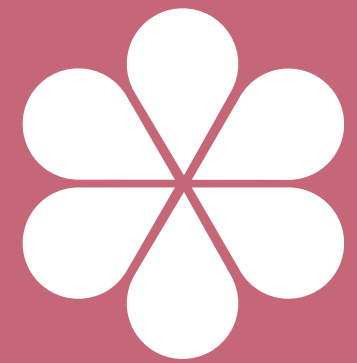
Using store cupboard & frozen food more

Less concerned about impact of food on the environment

Buying more indulgent & healthy snacks

Healthy snacks mostly bought for adult/s

Buying more convenience foods than other households



Meet The **Business as Usual** Households

The business as usual household (19% of population)



Three quarters are single or 2 person households



Four fifths have no children in the household

Nearly half are retired households





**KEEP
CALM
THERE'S
NO
CHANGE**

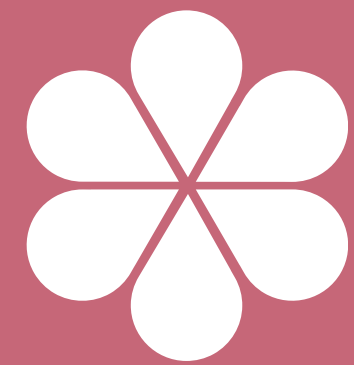
Little change in:

Cooking

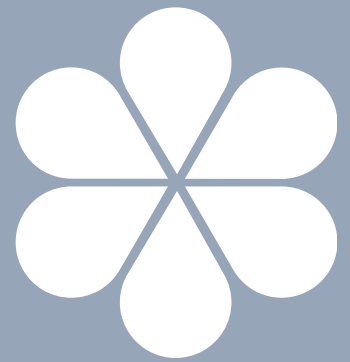
What's on their Shopping List

Consumption



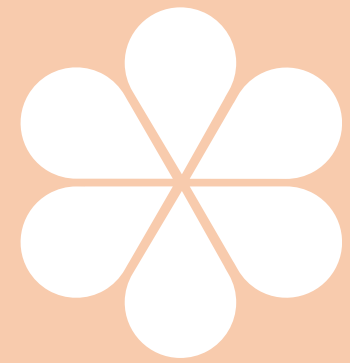


What does this all mean for Food & Drink Companies?



Over 60% of consumers have made changes to their shopping behaviour due to Covid-19

Given the length of Lockdown many of these changes will stick



How could these changes impact your category, product range, communications?

If you'd like help, just get in touch

**We have more detail on the
Lockdown Households which
we'd be happy to share, just get
in touch at
david.craig@Levercliff.co.uk**



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