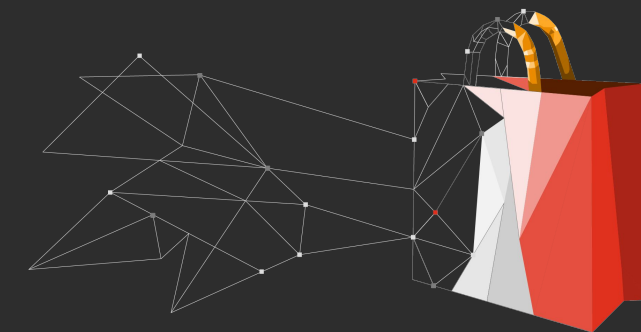


Retail in a 1.5-meter society: Adapting to changing consumer behavior



Consumer activities, priorities and preferences have shifted dramatically over the last few months due to the COVID-19 pandemic. Having learned from the 2008-2009 recession, we expect part of this behavior to 'stick'. For example, more and more consumers will get more comfortable with online shopping. In order to stay relevant in the market, it's crucial for retailers to understand the new consumer and take pragmatic action to respond to his needs.

The pandemic has given way to five distinct archetypes who face their own COVID-19-related challenges and consequently have different buying priorities. Getting in the minds of these consumers provides the key input when creating your organization's renewed roadmap.

Who are they?

Responsible Parents



Working parents with kids and elderly parents to support. At least one of them works full-time and they have maintained their living conditions.

Stability Seekers



People who have lost jobs due to the crisis and are actively seeking opportunities in the market which are still safe for them to pursue.

Fearless Leaders



Corporate leaders who are steering their organizations to the new normal by keeping their businesses afloat while managing personnel concerns.

Concerned Elderly



Retired people who are at high risk due to the nature of the pandemic. Safety and family well-being are their top priorities.

Bored Millennials



Digital-friendly people who have retained their jobs in the crisis and are learning to work from home with limited social interactions.

How has their lifestyle changed?

19.2% of people in this group have continued to shop for groceries online; they are also investing in creative, DIY kits to keep their kids engaged.

31.3% of people in this group have stopped spending time on social media and focus all efforts on finding work.

19.4% of them are now spending significantly more time on exercising at home given commuting time has reduced. They are also much more sensitive to where products originate from to be able to choose responsibly.

31.8% of people in this group are now spending more time preparing food at home.
51.8% are strongly opposed to shopping groceries online.

49.2% are exploring brands other than their regular favorites in the market and many are actively looking at product origins to be able to make responsible choices.

How to connect with this archetype?

Reliable, online, low-touch options, family-friendly options to continue to give them space to spend time with their family and on their own

Discount offers, attractive loyalty schemes to up the 'feel-good' quotient of a purchase. Flexibility to get refunds quickly can resonate well with this group..

A dose of something 'extra' to inspire them - like the retailer's own COVID-19 stories or a 'wow' experience.

A safe, trusted environment to shop - like exclusive hours, supply chain transparency, etc.

More personal (less transactional experiences), loyalty-oriented experience to increase upsell and cross-sell rates.

What pragmatic steps can you take?

We have identified concrete steps you might take along the retail value chain to ensure the action you take is relevant to the customer archetypes discussed on page 1.

Legend: Customer Archetypes (COVID-19 Era)



Responsible Parents



Stability Seekers



Fearless Leaders



Concerned Elderly



Bored Millennials



Source: PwC NL Consumer Insights Survey

This article is part of the series 'Retail in a 1.5-meter society: Uncover opportunities in crisis'. We invite you to visit [our website](#) for more information.

Get in touch with the authors of this article



Sakshi Dhakad
Retail Innovation
sakshi.d.dhakad@pwc.com



Johan Knijtijzer
Digital Marketing Lead
johan.knijtijzer@pwc.com



Jennifer Nelen
IT innovation & Digital
jennifer.nelen@pwc.com



Milo Hartendorf
Industry Leader
milo.hartendorf@pwc.com



Peter Hoijtink
Consulting Partner
peter.hoijtink@pwc.com



Peter van Kampen
Retail Operations & Finance
peter.van.kampen@pwc.com

Our broader Consumer Markets team is here to help as well

Looking to (re)evaluate your strategy? We can help.



Future of Retail Game
Scenario-based gaming experience to simulate responses to COVID-19 challenges.



Retail future readiness scan
Capability assessment to evaluate your maturity within the retail value chain.