



RE-OPENING UK RETAIL POST COVID-19

An analysis of shopper concerns and preferences.

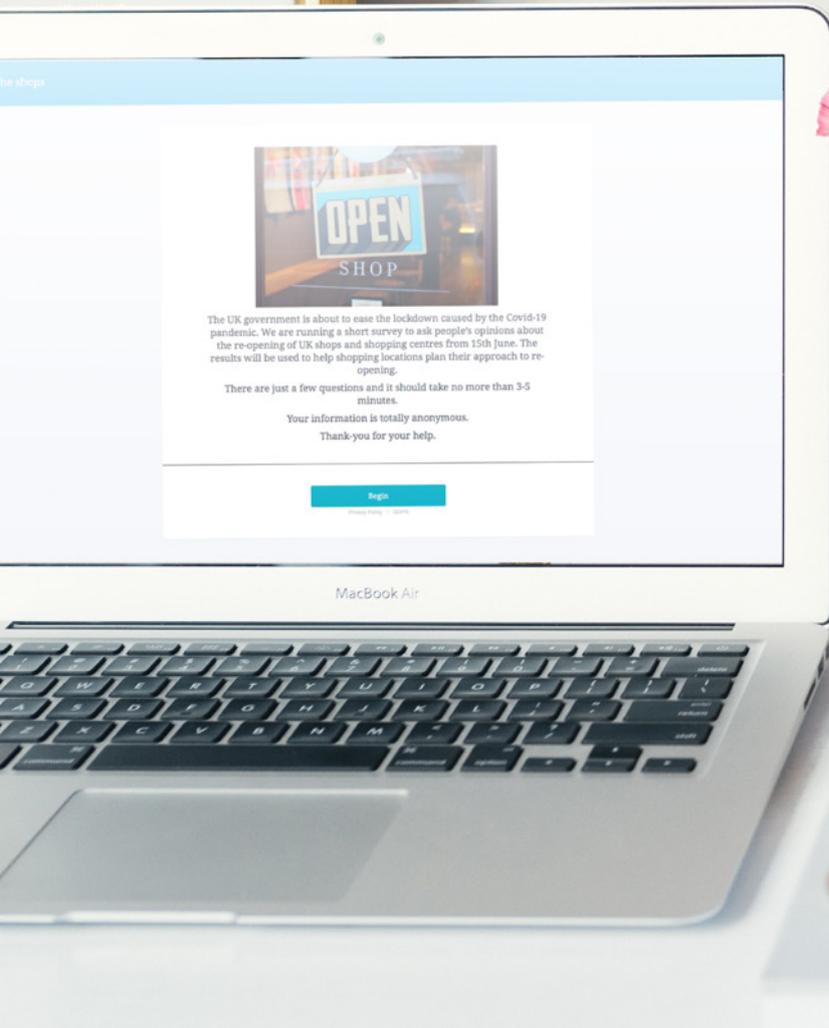


Background

The majority of UK shopping destinations will be opening their doors to the public from Monday 15th June 2020 following the loosening of lockdown restrictions by the government.

As specialists in destination marketing and retail analytics, AL Marketing and Springboard wanted to gain a clearer understanding of shopper attitudes towards this significant change.

The findings are valuable to management teams involved in retail destinations in order to plan their operations as well as optimising their communication to their shopping audiences as retail gets set to welcome shoppers back to their venues.



The Survey

800 shoppers participated in an online survey organised by AL Marketing. The sample groups were formed of shoppers based in a range of towns, namely: Harlow, Reading, Banbury, Shrewsbury and Chesterfield.

This survey was supplemented by a further study reaching a 1436 sample audience across the UK. This used the survey platform of property tech specialist Maybe* which is able to access the database of the High Street Task Force.

This shopper survey has then been interpreted in conjunction with the footfall analytics and insights provided by the team at Springboard.

Key Take-Outs

Safety concerns are a major issue for shoppers with 32% nervous about shopping again compared to just 14% who are excited.

The need for social distancing resonates strongly with shoppers. In addition, limits on the number of people inside a store and the availability of in-store hand sanitisers are the key concerns.

A major discouraging factor when considering where to shop is the fear of other people not practising social distancing. Meanwhile, lengthy store queues and shopping centres failing to ensure adequate cleaning are also off-putting factors when considering a shopping visit.

Over half (55%) of shoppers will visit major towns and city centres less than they did before lockdown. Covered shopping centres face a similar threat (53%) and even retail parks are seen as less attractive as destinations (48% will visit them less often).

High Streets perform slightly better with 46% saying they will visit less often, but the most appealing locations seem to be shopping centres that are in the open air (34% will visit less often with over half visiting about the same amount as before.)

A third of shoppers have become enthusiasts of online shopping stating that they will shop more online than they did before lockdown (36%) while 43% will continue at the same level. Meanwhile a fifth of shoppers (19%) are keen to revert back to traditional shopping and away from online.

People will also be buying fewer items. 20% will reduce their purchasing levels with 28% shopping in a more considered way for fewer, but higher quality items.

The aspects of shopping that people have missed most tend to be those with a social dimension - restaurants & cafes score highest at 32%; fashion shopping at 21%; and entertainment scores 16%.

Headline Findings

- Shoppers have major reservations concerning safety prior to returning to shopping destinations. (32% are nervous compared to 14% excited.)
- Observing social distancing (29%), limiting the number of people in stores (26%) and the availability of hand sanitisers (22%) are the main elements which would make people feel safer. Face coverings much less so (8%).
- There is a big concern about other people not following the safety measures (36%) and there being long queues to get into shops (32%).
- 20% will be buying fewer items post lockdown and 28% will shop in a more considered way for better quality items in the future.
- The aspects people have missed most during lockdown are: Restaurants/cafes; (32%) Fashion (21%); Entertainment (16%).

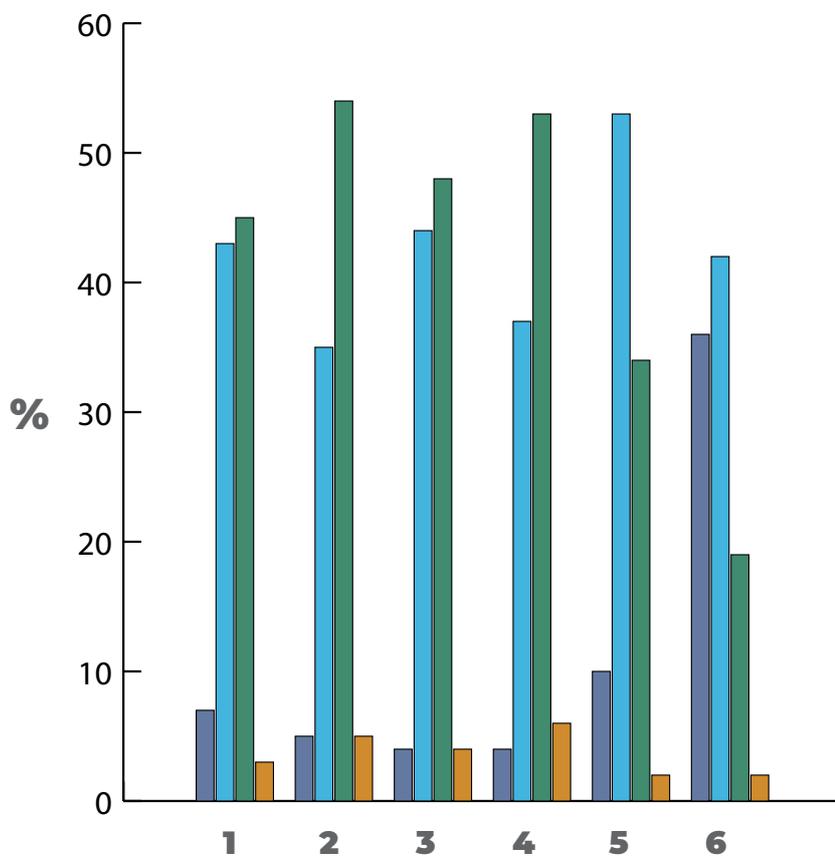
People were asked which type of shopping destination they'd visit post lockdown and how often.

- High Streets - 42% will visit less often; 45% about the same
- Larger towns/city centres – 53% less often; 30% about the same
- Retail Parks – 48% less often; 45% about the same
- Shopping Centres (indoors) – 51% less often; 32% about the same
- Shopping Centres (outdoors) 30% less often; 53% about the same
- Online shopping 21% less often; 40% about the same; 34% more often

Responses



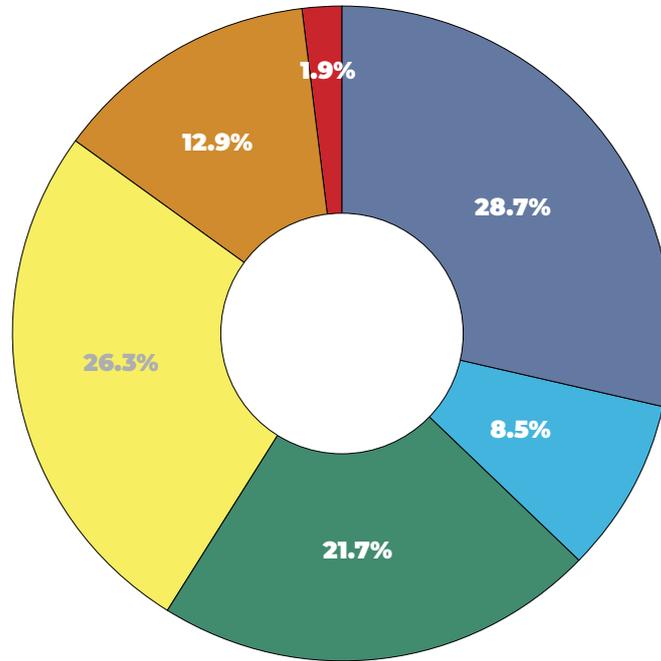
Where and how often will you shop?



	More (%)	Same (%)	Less (%)	Not at all (%)
1. High Street	7	43	45	3
2. Town/Cities	5	35	54	5
3. Retail Parks	4	44	48	4
4. Shopping centre indoors	4	37	53	6
5. Shopping centre outdoors	10	53	34	2
6. Online shopping	36	42	19	2

Answered: 800 Unanswered: 0

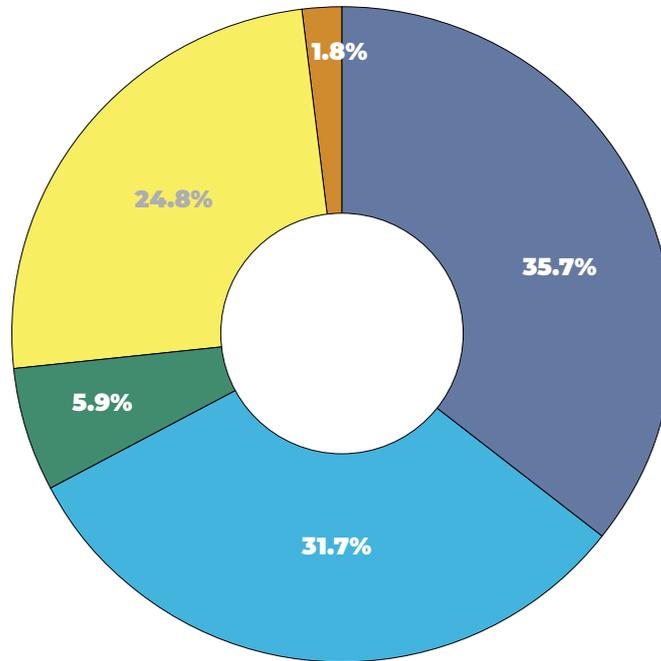
As shopping centres and destinations prepare to reopen which of these safety measures will make you feel most at ease?



Choice	Total
Observing social distancing	632
Wearing a face covering	188
Lots of hand sanitisers in the shopping location	477
Limits on the numbers of people in a store or a mall	579
Visible cleaning teams	284
None of the above	42

Answered: 800 Unanswered: 0
 Respondent could choose up to 3 answers.

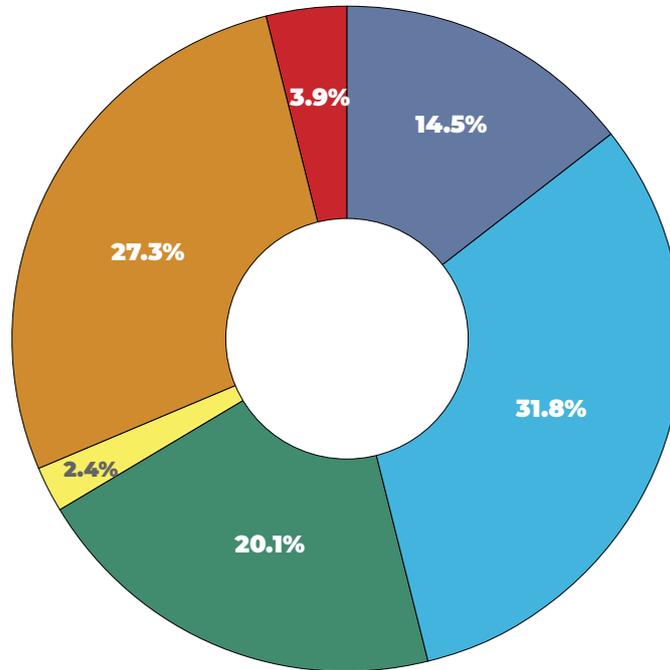
What, if anything, would put you off shopping immediately after lockdown is eased?



	Choice	Total
	Other people not following social distancing and safety measures	679
	Long queues to get into shops	603
	Concerns over transport to the location	113
	The shopping location won't be doing enough to ensure public safety	471
	Nothing would put me off shopping	35

Answered: 800 Unanswered: 0
 Respondent could choose up to 3 answers.

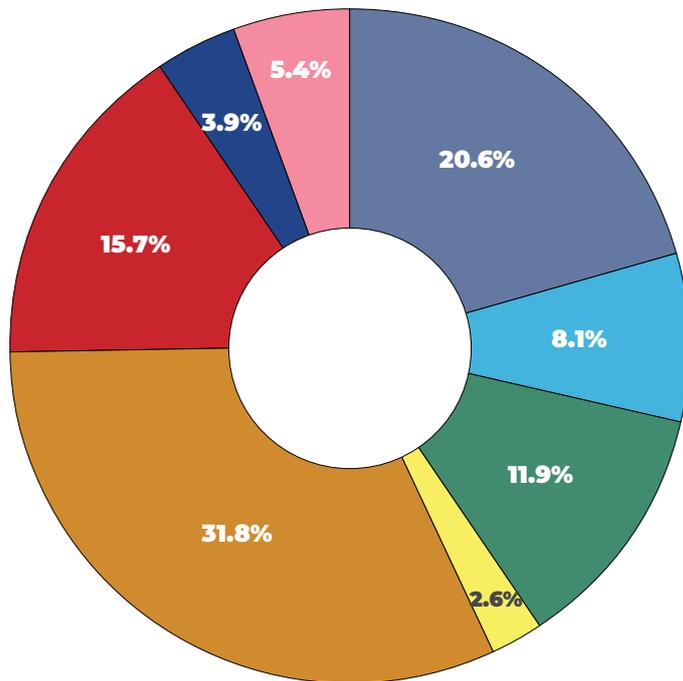
Which statements do you agree with regarding lockdown being lifted?



Choice	Total
 I'm excited to be able to go shopping again	195
 I'm nervous about returning to shopping again	428
 I'll be buying fewer items after lockdown than before	271
 I'll be buying more items after lockdown than before	32
 I'll be shopping in a more considered way for quality items after lockdown	368
 None of the above	52

Answered: 800 Unanswered: 0
 Respondent could choose any number of answers.

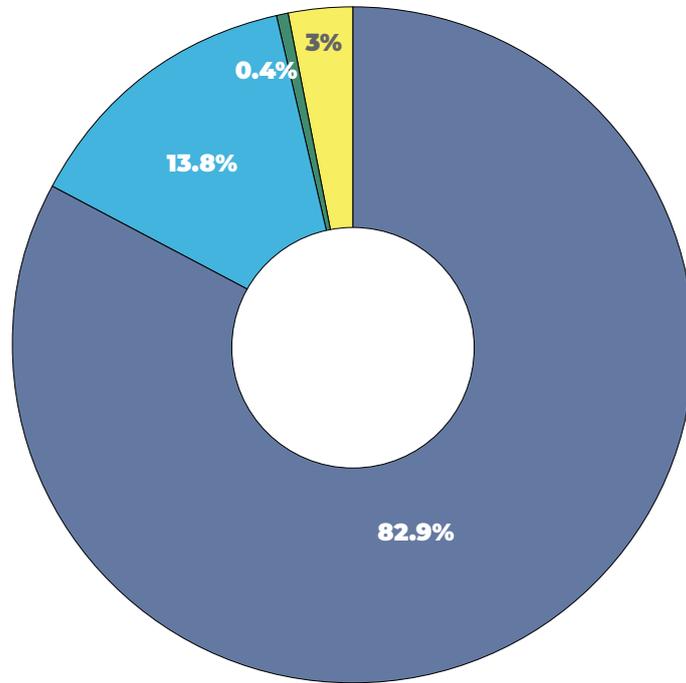
Which type of shops have you missed most during lockdown?



Choice	Total
 Fashion	360
 Beauty	141
 Homeware	208
 Electronics	45
 Restaurants/cafes	555
 Entertainment (cinemas/leisure brands)	275
 Other	69
 None	94

Answered: 800 Unanswered: 0
 Respondent could choose up to 3 answers.

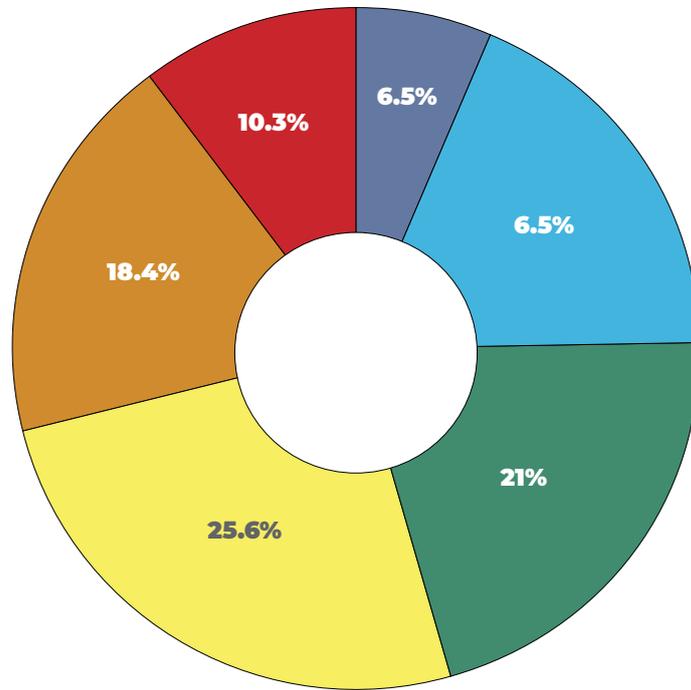
Please could you state which gender you identify as?*



	Choice	Total
	Female	663
	Male	110
	Other (e.g Gender Fluid, Agender or Non-binary)	3
	Prefer not to say	24

Answered: 800 Unanswered: 0

What is your age?*



	Choice	Total
	16 - 24	52
	25 - 34	146
	35 - 44	168
	45 - 54	205
	55 - 64	147
	65 +	82

Answered: 800 Unanswered: 0

Quote from Alan Thornton, Joint Managing Director, AL Marketing

“The survey shows that safety is an overwhelming concern for the vast majority of shoppers. A key challenge for shopping destinations is to re-assure nervous shoppers that retail spaces are doing the maximum possible to ensure that they are as safe as they can be. In addition, they then need to effectively communicate the measures that they are putting in place.”

“This survey provides a glimmer of hope particularly for newer shopping districts within open street environments which have the reassurance of being controlled, managed environments but give the impression of blending in with the surrounding area. Vicar Lane in Chesterfield is a good case in point with an open street environment allowing shoppers to socially distance with a reassuring array of discrete queuing systems, visible cleaning regimes and informative video signage which aims to encourage and inform.”

SPRINGBOARD.

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