

HOW WILL INDIAN CUSTOMERS SHOP?



Image Credit: Getty Images.

CHANGE IN CUSTOMER BEHAVIOUR POST LOCK DOWN: A SURVEY



“The virus is rewriting our imaginations. What felt impossible has become thinkable. We’re getting a different sense of our place in history. We know we’re entering a new world, a new era. We seem to be learning our way into a new structure of feeling.”
— Kim Stanley Robinson

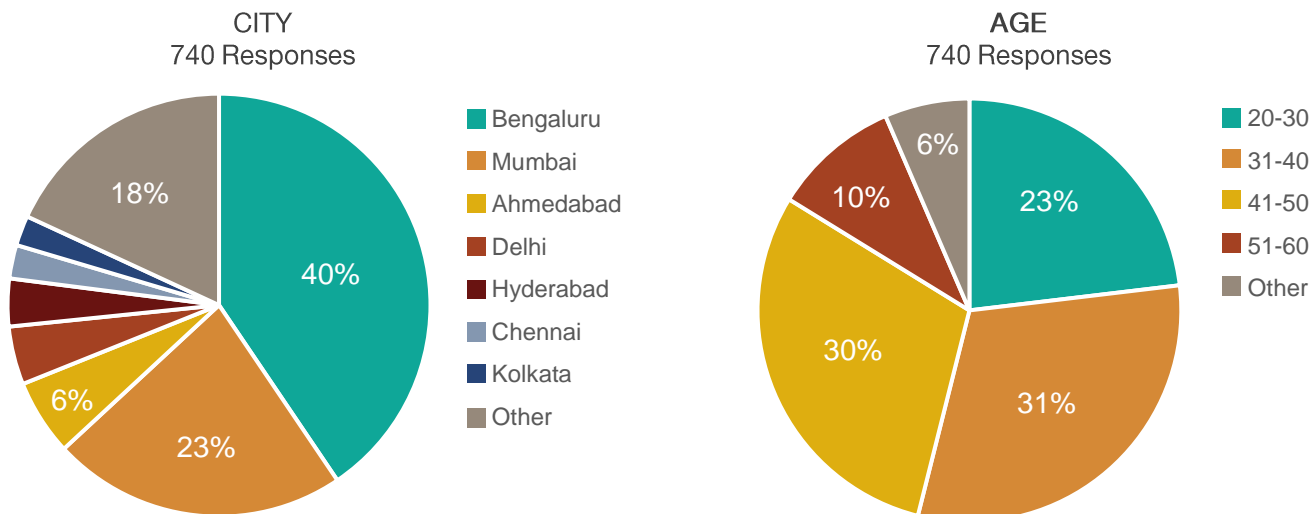
Sneak A Peek into how customers have changed and how brands can prepare to succeed with ‘The New Normal’ in retail environments

This survey emphasises on capturing behavioural change of customers due to COVID19 scenario with the intention to understand how they will respond post lockdown. The figures are to be seen as incremental shifts and not as absolute numbers.

CHANGING SCENARIO

The retail world we knew has changed. Retailers are innovating and building strategies towards the 'new normal'. We thought it would be a good idea to ask customers how they would like to shop post lockdown.

FRDC in association with Brand Footprint & The Better Design Foundation recently conducted a survey to assess changes in customer shopping behaviour post the lockdown due to COVID19. The online survey and discussions covered customers across India to determine changing preferences, expectations and implications on retail. The findings are based on responses of men and women, between the ages of 20 to 75 years, across Sec A+ & A, with a sample size of 740, 51% female and 49% male participants across urban and Tier 1 locations in India, including Delhi, Mumbai, Bangalore, Chennai, Ahmedabad, Hyderabad & Kolkata.



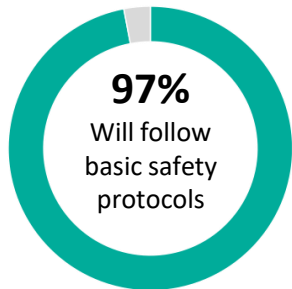
The questions delved into how customers' behavior will change towards contact with products, proximity to other customers and staff at the store, cleanliness and hygiene of the store and products and more. Learn about the customer preference for different channels before and after lockdown, changes in shopping frequency and acceptance of digital interfaces.



PERSONAL SAFETY

#1 CUSTOMER CONCERN

CHANGING CUSTOMER



Social distancing and using masks will be the norm

97% participants said that they expect to continue to follow basic safety protocols, 53% of participants say they will follow them strictly.



Use of hand sanitizers is here to stay

76% of participants say they will carry and use their own sanitizer.



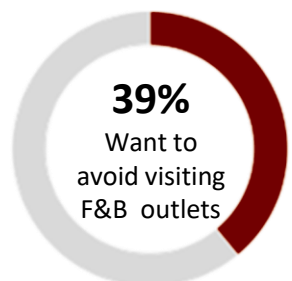
Customers will shop only when necessary and reduce time spent in stores

73% consumers will change the way they shop, with 45% participants are not wanting to enter a store unless absolutely necessary, 28% will reduce the time spent at the store.



Customers do not want to shop in crowded spaces

47% customers will not enter stores that don't have physical distancing in place, another 28% said that they would rather wait outside if the store is crowded and 22% are willing to order online.



Customers wary of dining in restaurants

With many trying to avoid social interactions with large gathering under a roof, 39% want to avoid visiting food and beverage outlets. 61% who still preferred going to restaurants will do with decreased frequency from twice a month to once a month on average.

PRODUCT INTERACTION

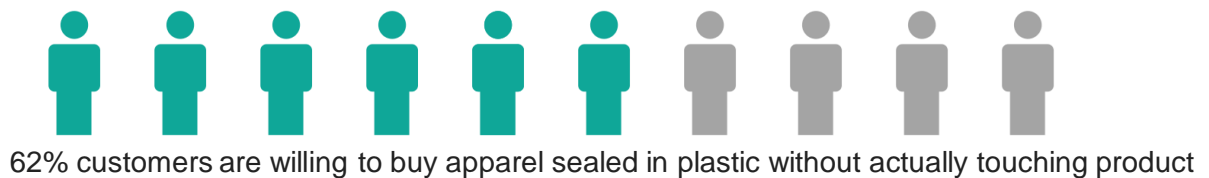
Need to touch and feel products see a major shift



For fashion products, customers are comfortable with reduced options on display and feel trial is not a must



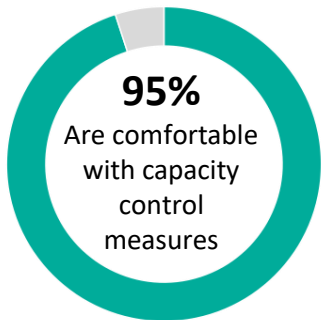
Sanitization of products to ensure safety is a must





**CLEANLINESS
& HYGIENE**
are critical
customer expectations

CHANGE IN STORE ENVIRONMENT



Customers prefer stores which limit number of customers at one time

95% of participants are comfortable with capacity control measures of which, 25% of participants say they will visit stores only if capacity control is in place.



Customers expect social distancing even in store

86% of participants say they will be comfortable communicating with staff only while maintaining physical distance.



Store hygiene is critical

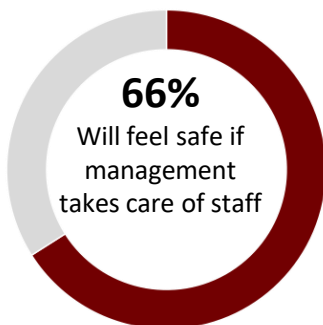
85% of participants think stores need to be cleaned through the day at regular intervals, and commonly touched surfaces such as doors, counters, card swipe machines should be cleaned after every hour / after every customer usage.

CHANGE IN STORE ENVIRONMENT



Customers expect clean & disinfected trial rooms

82% of the participants are willing to use trial rooms, of these 51% of the participants feel the room needs to be cleaned after every customer use or every one hour.



Customers expect brands to take care of staff health and safety

66% of participants said they will be assured of safety if management is taking protective measures (mask & gloves) and ensuring temperature checks of the store staff. For 25% of the survey participants it is not easy to trust the brand and staff. The absence of trust would make the customers worry about their safety.



TECHNOLOGY DRIVEN SELF-SERVICE will become prevalent

EMBRACING TECHNOLOGY

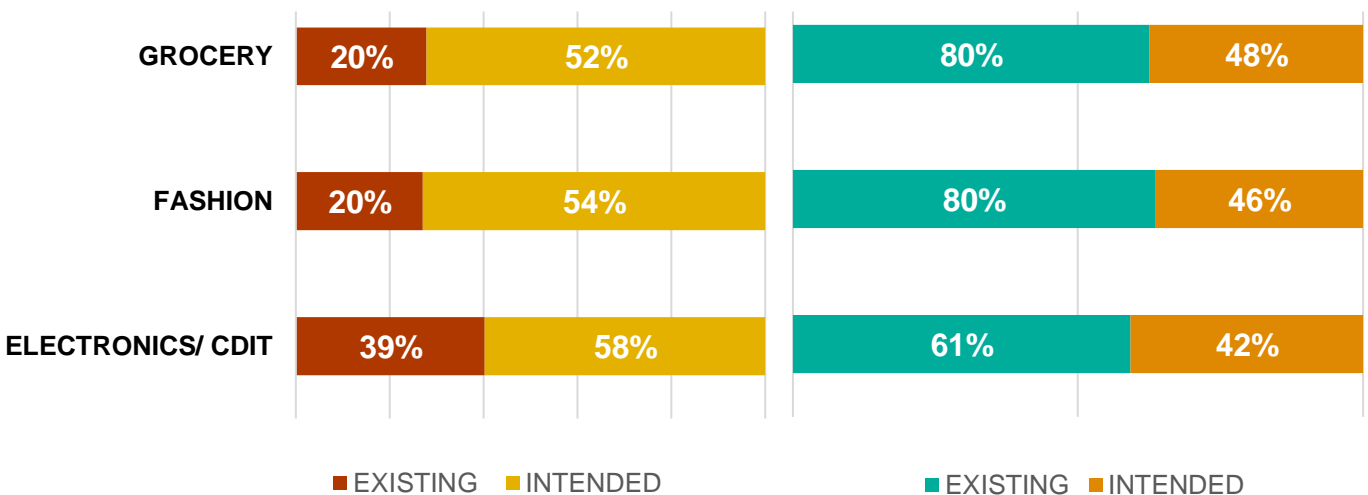
Customers show significant intent to shift to shopping online
Largest change seen in the 31-40 years age group



Shopping Online



Shopping in Physical Stores



RISE IN AUTOMATION AND SELF SERVICE

Most participants were comfortable shifting to self-service while ordering, purchasing and bagging to minimize staff interaction in store



About 62% of participants prefer self checkout



More than 90% are comfortable using vending machines, self ordering screens, if they are user friendly

CUSTOMER'S PERCEPTION



Customer behaviour post lockdown is expected to change significantly



Personal safety will be the critical driver. Customers will buy from channels and stores where they feel safe



Customers are willing to sacrifice wider assortment in fashion but would still prefer trial



Sanitization of products is a must



Cleanliness and hygiene of store and staff are key elements to make customers safe & comfortable

CONCLUSION

Customer's loyalty towards a Brand and Retailer is driven by various factors including the in-store customer experience. COVID 19 has significantly altered customers' expectations of what constitutes a good and safe in-store experience. All retailers and brands have to redefine their in-store customer experience to reassure and strengthen loyalty with their customers. They will need to evaluate the 'WHY, WHAT & HOW', and map out the road ahead to the 'new normal.'

'WHY TO REBOOT?'

It is the steps you take today, which will create a lasting impact and re-cement the brand's loyalty among customers. Maintaining status quo may lead to customers shifting to alternates.

'WHAT WILL YOU DO?'

Solutions are plenty and vary for each retailer and format, ranging from short term 'need of the hour' solutions to those that bring long term success. A good blend of both is the key here.

'HOW TO OVERHAUL?'

Scale and speed of implementation depends on your store footprint, product categories and available budgets.

Today, we stand at crossroads, and it is a must to make customers feel safe and wanted to step into our stores.

For more information contact:
info@frdc.in
connect@brandfootprint.in

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