

Brand Overview: Retail - UK - 2021

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This report looks at the following areas:

- The impact of COVID-19 on retailers and how it will impact on consumers' expectations around retailers.
- How leading retailers score on metrics such as usage, trust, satisfaction, likely recommendation and perceived differentiation.
- The top scoring brands for particular personality traits, including value, ethicality, innovation, and customer service.
- Retailers particularly noted for online service.

Lockdown periods and social distancing measures put additional strain on non-essential retailers, including department stores and fashion retailers, and on retailers with no existing online presence or delivery logistics. At the same time, the coronavirus crisis meant an immediate decline in consumer confidence that encouraged consumers to add to their savings and cut back on non-essential spending, adding pressure on the entire non-grocery retail sector.

While the shift towards ecommerce represents a long-term phenomenon, the in-store shopping experience is hard to replicate via digital channels. As the proportion of consumers who try to limit the time they spend in-store gradually drops, retailers' physical spaces can become a powerful tool to reach and appeal to new audiences. For instance, retailers can take inspiration from Harrods's in-store art exhibitions, original window displays and live on-site events to catch the eye of consumers and add value to the in-store shopping experience.

Although the economic aftereffects of the pandemic have led consumers to put particular emphasis on value, the coronavirus crisis has also put ethical topics such as fair treatment of workers and environmental sustainability in the spotlight. This suggests that messaging exclusively focused on low prices may reach a limited audience and narrow retailers' room for manoeuvre in the longer term.



"The coronavirus outbreak and related challenges such as store closures and social distancing measures urged both retailers and consumers to approach shopping with new eyes."

- Emilia Tognacchini, Brand and Household Care Analyst

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Retailers that develop a more holistic understanding of value that takes into account consumer demand for convenience, ethical credentials and guidance towards positive behavioural change are better placed to resonate across demographics. For example, Co-op's move to make its GRO plant-based ranges more price accessible to a wider public in order to reach its environmental goals in time showcase a clear value-for-money proposition while promoting an ethical brand image.



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