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Behavioural change post-Covid 19.

A Walnut perspective on which familiar behaviours
will return, and which will become the new normal

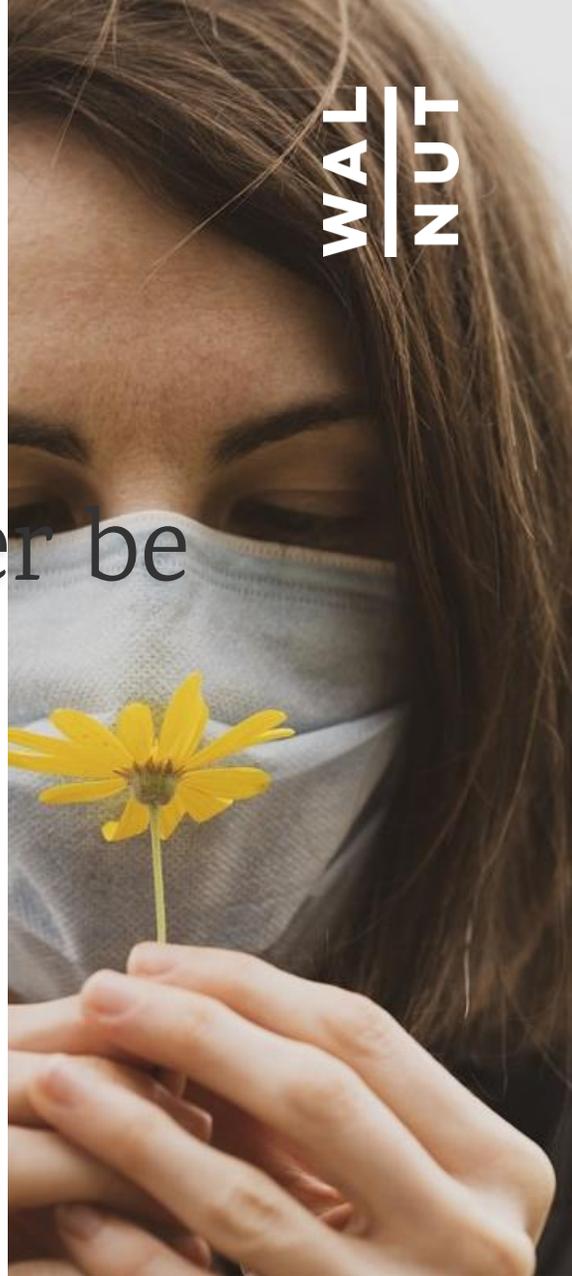
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The human understanding agency.



Things will never be the same again. Or will they..?

Walnut have used the lens of Behavioural Science to predict the aftermath of lockdown and inform future strategy planning – both for sectors that want to instigate and drive a ‘new normal’, and those that want to firmly re-establish pre-Covid behaviour.



As rumours about lockdown restrictions being lifted globally abound, a glimmer of hope emerges on the horizon – signs that there is a future beyond the current situation.

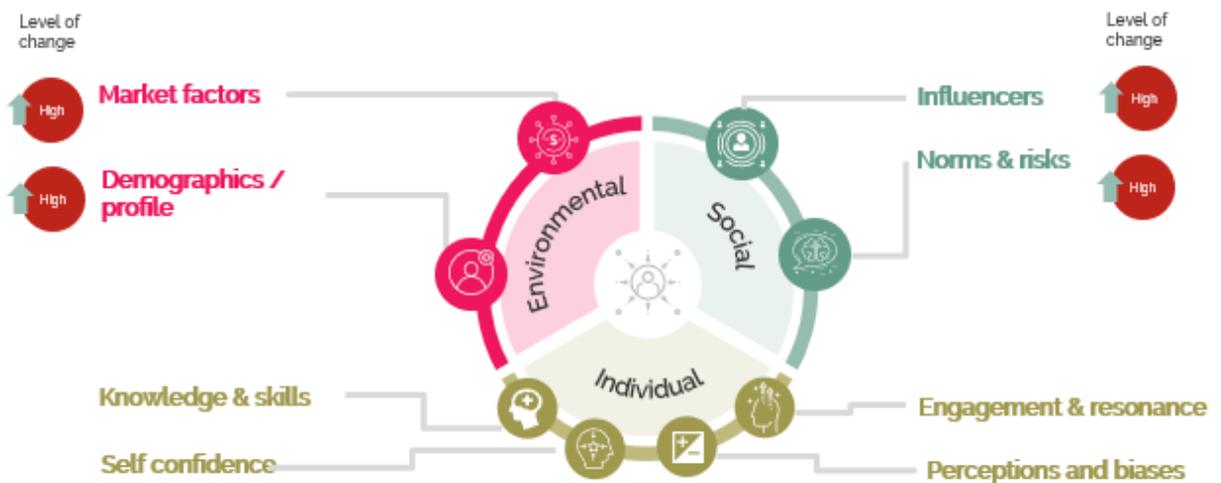
Adaptation, pivot, change, flex... all words we've been hearing a lot in recent weeks, as normal life has been put on hold. In the short-term, we've all adjusted the way we shop, socialise, work, eat – riding on the government's promise that these are just temporary measures. We're all left thinking 'things will never be the same', but experience tells us differently. So where does this leave us as consumers – is 2020 just an anomaly and our usual behaviour will soon resume – or is society permanently, irreversibly changed?

Walnut's Understanding the Nation tracker has monitored attitudes and behaviours for the past two years, and reveals that confidence in the country's economy has nose-dived, whilst positivity towards current mental health is at a record low!

Behavioural science indicates that many habits will revert to normal relatively quickly once social restrictions are lifted (just think how swiftly we've adopted a new way of life, and how readily we could shake it off again). After all, fundamental human needs don't change that much, just the specifics of how we meet those needs.

As is often the way with such things, the truth is probably somewhere in between these two extremes . Ultimately, we will favour *new* behaviours that have a clear advantage and positive influence – for example, a long-lasting and profound change in the mores of social interaction and personal hygiene. We'll likely discard everything else in favour of the familiar.

Introducing the Behavioural Change Wheel.



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The **Behaviour Wheel** framework helps us to identify each of the key environmental, individual and social factors that can influence humans to drive behavioural change. Integrating external as well as individual reasons will help us pinpoint what factors are holding people back from changing their behaviour, as well as what tools they need to be able to do so.

Already we've seen countless examples of the market shifting our behaviour – scarcity of food has led to stockpiling, closed stores has led to online shopping. Alongside that, we have the **social influence** of government updates, and the new **norm** of an elevated appreciation of NHS staff. These have undeniably changed our way of life for now.

The extent that new skills and confidence around a brand or service is established now, along with usage patterns and brand expectations, will be key to shaping future engagement. This will inform the strength of the brand relationship post lockdown as market and social factors diminish over time.

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Behaviour
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to normal.



How people emerge from lockdown will depend in large part how they went into it and how their circumstances have dictated the kind of lockdown experience they have had.

Whilst most people have embraced a 'one day at a time' mentality to the current crisis, Walnut have been thinking about how brands can re-engage consumers once this tidal wave recedes.

It is in our human nature to *overestimate* the impact of both positive and negative changes in our lives. In reality, our emotions will always eventually recalibrate and stabilise – known as the 'Adaptation Effect' in Behavioural Science. Even after a life-changing event such as winning the lottery or an accident, our brains will eventually reduce the effect on our emotions in the long-term – the classic phrase 'time heals'.

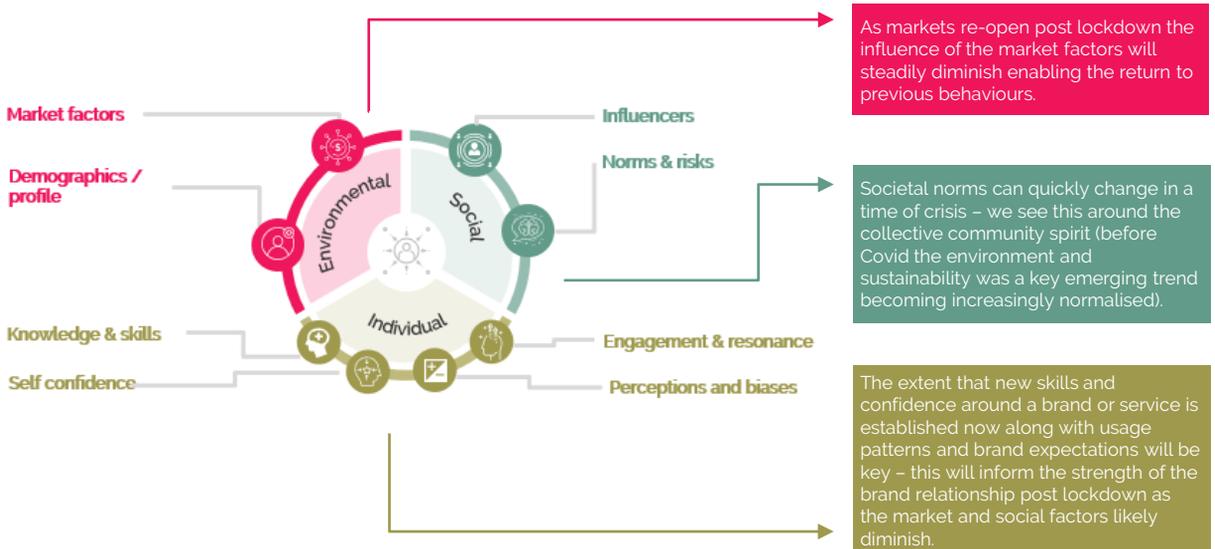
Walnut's Understanding the Nation study has tracked this exact response occurring across the nation. Strong feelings of uncertainty and worry which soared at the start of lockdown began to stabilise in the latest wave of May data.

History has time and time again revealed how life can bounce back from challenges – at the height of Mad Cow disease or the 2008 recession it felt things could never be the same again...and yet they pretty much were. In most cases, we won't be permanently changed; it will take time for us to resume normal habits, but perhaps not as long as we expect. This has implications for the way that brands communicate with consumers, as the tone will need to adapt and shift as we normalise.

Long term behaviour change require shifts in individual needs and preferences.

Post lockdown we will rely on longer term shifts around individual needs to sustain long term behavioural change, as market and social influences begin to diminish their influence.

The extent that new skills and confidence around a brand or service is established whilst in lockdown, along with usage patterns and brand expectations will be key. This will inform the strength of the brand relationship post lockdown as the market and social factors return to normal. At Walnut, we're working with Realise, our data science partners, to collect interpret and understand vast behavioural data sets. By looking at the differences before and after coronavirus, we can begin to piece together a complete picture of the behaviours for brands across the UK right now to guide strategy.





Looking forward: some new behaviours will be short-lived as restrictions are lifted.

For small impulse purchases, it will be easy for us to revert to our old habits once retailers reopen. In the immediate aftermath, we'll continue to have bigger grocery baskets (always good to have a spare), and if we discovered cheaper alternatives that satisfied us, we'll continue using them.

There will be an appetite to spend on experiences and tap into an element of life which has been completely on hold – to try new things, see new places and get out of the house. These will gain traction as any social distancing measures or restrictions on travel relax.

Further down the line, there will be a surge in bigger-ticket decisions – extended time at home will lead to home improvement or even considering house moves. With a huge economic downturn anticipated, we might have to wait longer than previously to make these big investments, with more careful budgeting and saving as the market takes time to recover. In fact, the divisions forged in society will be critical to understand as a tool to segment current and potential customers – the divide between the rich and the poor will be exaggerated.

Quick to revert

- Small impulse purchases
- Clothing
- Entertainment subscriptions
- Gym memberships

Longer to revert

- Bigger ticket items e.g. furniture, tech
- Larger grocery baskets
- Air travel
- Automotive



Brands that have made a positive emotional connection will thrive.

The current lockdown period is an opportunity for brands to forge positive emotional connections that will bring benefits in the long term.

Over time, our brains will begin to filter the endless negative news feeds, and positive emotions will more easily cut through the clutter. These positive emotions will build strong memories – Rosy Retrospection Effect dictates that our brains tend to see the past in a more favourable light. If a brand can positively affect consumers lives in a dark time, this will build a foundation of strong brand equity. Ultimately, we will favour new behaviours that have a clear advantage and positive influence, and discard everything else in favour of the familiar.

How to achieve long-term behaviour change

1. Be human: empathise with the situation – Be pragmatic, be honest, be authentic. This will help develop the emotional connection with customers.
2. Make life easier for customers to engage – Remove barriers to engagement and inertia. The harder a brand is to engage with, the less incentive there is to long term behaviour change.
3. Be mindful of changing financial pressures – What works now might not in future as money pressures change and other priorities emerge. Have a range of products and services suitable for now and future as mindsets (and anxieties) change.
4. Reward desired behaviours of customers – Help customers become more confident using your products, services, and touch points, and educate on wider benefits.
5. Establish your brand as the new normal – Show that the brand is there to support through Covid times and normal times (e.g. NHS support not just for Covid). Consumers will expect your brand to have the same values moving forward as you show now (long term behaviour change for brands).



Where Walnut can help.

Here at Walnut, we have a team of Behavioural Science experts ready to help you to unlock the optimal way for your brand to navigate COVID-19 and beyond.



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Understanding attitudes and behaviour change

Our Understanding the Nation study ([read our report here](#)) tracks consumer mindsets, behaviour and wellbeing to explore the impact on your brand as new behaviours are formed. Audience Connectivity uses data-led analysis to unpick how behaviours are changing and influencing decision (in partnership with Realise Unlimited).



Optimising comms & strategy

Our Behavioural Science consultants will overlay our Shortcuts framework to inform the optimum message strategy to key audiences. Test your ads using our AdMire framework - powerful neuroscience techniques will reveal optimisation routes to deliver the key messages.

[Read more about Advertising and Comms at Walnut](#)

[Read more about Behavioural Science at Walnut](#)



Product portfolio and pricing optimisation

Behavioural conjoint takes account of the key contextual factors to enable you best to position the brand to optimise sales now and post lockdown. Our Audience Planner maps updated consumer needs and preferences back onto the customer database to enable more effective targeting based on their new behaviours.

[Read more about Pricing and Data Analytics at Walnut](#)



Thank you.

The human understanding agency.



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