



# HABITS/MADE/LOST/FROZEN

HOW WE (MAY) BEHAVE NEXT

Habits drive behaviours, constantly. They're really hard to form, but also to break.

Lockdown may have been physically and emotionally disruptive enough, for long enough (crucial), to do so.

If so, which habits have we lost, which have we gained (and are sticking), and which are just frozen until we return to schools, commuting, foreign travel and more?

Data: digital sources showing intent and attitude (search, social etc), panel polling, and commercial.

**WANT TO HEAR MORE? GET IN TOUCH.**

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**BEFORE WE START...**

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# HABITS ARE PERSONAL

We've collated a huge amount of data and research from digital sources that show intent and attitudes in the UK (search, social, panel polling, commercial results). Then summarised it all in this report.

We're seeing marked splits by cohorts, which reflect the different ways COVID-19 has, and will yet, disrupt lives.

1) We are a two-tier country, economically, between those in office jobs/skilled manual (less-impact), and those in more casual hospitality and retail (high-impact). Furlough has masked some of this impact, to-date. This will also see different economic impact, based on those group's respective spending habits. This IS NOT a normal recession in this respect

2) Age is huge - the things lockdown has prevented (exercise, socialising, schools) for the younger end of the spectrum, vs the older (shopping, greater reliance on F2F communication) differ wildly.

*Few habits are universally new or lost – most are made or forgone by specific groups*

# A RECENT REPORT FROM TWITTER, WHICH SUMS UP WHERE WE FIND OURSELVES:

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Firstly, we don't know what the future holds, and accept that nobody else does either. We understand that for every argument there is a counterargument.

Secondly, behaviour change is slow, complex, and structural.

Thirdly, COVID-19 did not happen in a vacuum — it happened to a world already in motion and in many ways acted as a pressure cooker.

Fourthly, there isn't one COVID-19 story, there are 7.8 billion — for some this was life-altering, for others a mild inconvenience. And lastly, the situation is still evolving by the day, and as others have said, this is a good time to ask questions. //

(Twitter Marketing)

HABITS/

# FORMED



# EXERCISE: LET'S GET PHYSICAL, PHYSICAL

Absolute levels are equivalent to a January surge. But, at-home: both hi and low tech (Peloton are booming, so are at home HIIT and 'couch to 5k' downloads). Note, Joe Wicks was more of a flash-in-the-pan... but don't overlook walking - single biggest form of what people self-designate as exercise. People have become more loyal to their instructor now than to their gym brand.

- [Google searches](#) for "home workout" or "Peloton" have risen to similar levels as "gym membership" in Feb/March 2020

## EMBRACING THE SLOW DOWN

Mental health has been described as #TheOtherEpidemic - 33% of people Tweeting about mental health hadn't tweeted about it before (OneFifty research, March - 28th May 2020)

While enforced and unplanned, many took the positives from adapting to a slower pace of life, and tweeted an intention to stay in the 'slow lane' in the future - **74%** have stated on social they take more pleasure in the small things that make them happy (Brandwatch, UK. 23rd March - 28th May 2020)

# EATING: WE'RE GETTING HEALTHY

Sustained shifts in recipe searches, organic food provision, and supplements. Seems to have been mainstream, not faddy diets (which have seen modest increases only). Again, this is a bigger, and more sustained shift than we'd see in a typical January.

Associated with this is surges in weight loss research suggesting a macro trend around well-being. Interest in veganism (likely within diets, not absolute veganism) has had a significant uplift, but amongst younger consumers.

- Search trends for organic saw a 65% increase and healthy recipes a 50% increase since pre-lockdown periods (Google Trends - 2020)
- 25% of young British Millennials (21-30) say a vegan diet has become more attractive to them during COVID ([Mintel](#))
- One in five Brits say they have reduced their meat consumption during the pandemic. An additional 1.8 ([BBC News reporting a study by Nielsen](#))
- Million households have been buying meat-free products - tofu is the go-to meat-free food ([Nielsen](#))
- Supplements saw a 25% increase in between Jan and Aug 2020
- "Intermittent fasting" has seen 7.7k Twitter mentions between Mar-Jun, which is a 9% increase compared to the 4 months prior to that
- More than one million people in the UK have given up smoking since the start of the coronavirus pandemic, according to a new study by the nonprofit Action on Smoking and Health.

# MEAL DELIVERY: I'M SUBSCRIBED

Meal delivery /food boxes: elevated still at the end of lockdowns. This wasn't just a reaction to lack of food availability early on. Stickiness of these subscription services is high, showing that repackaging an existing behaviour (cook from fresh) works with the right trigger to adopt.

- In March, revenue in the online food delivery segment was up 11.5% versus a comparable period last year (Statista)
- [Statista](#) also reported 9.8% more people using food delivery services
- At the beginning of May, [Mindful Chef](#) reported a 452% rise in customer numbers since the end of March
- [Gousto](#) has hired 400 extra people to cope with demand and secured £33M in new funds
- [Hello Fresh](#) said it expected sales growth of between 40% and 55% this year, compared with a previous forecast of between 22% and 27%





## DINING IN IS THE NEW DINING OUT

Fine dining in a box, it's all the rage. It's a compromise, but it goes some way to bridging one of the gaps in our lives.

- 27 of London's top chefs are now offering top-quality cook-at-home meal kits for Valentine's Day ([The Resident](#))
- Born in 2020 when your living room was Hollywood and it was acceptable to eat lobster in your underpants, Restaurant Kits was brought to the UK
- Michelin-starred Northcote in Lancashire sold almost 700 'at-home' food boxes in under half an hour (The five-course tasting menu was priced at £65 per person)



# IS BOTTLED WATER THE NEW TOBACCO?

The pandemic has given people time to consider what they have around them, and they got used to the taste of tap water after all...

Premium springs rather than filtered, however, are faring better, as are so-called functional waters with added ingredients from caffeine to pomegranate seed oil or probiotics.

- The industry's third-largest player, Danone, predicts its second-quarter water sales will **fall 30%**

A cyclist wearing a white and blue jersey with 'fabric' on the back is riding away on a dirt path through a wooded area. Another cyclist is visible in the distance. The path is covered in fallen leaves and surrounded by dense green foliage.

## RUNNING AND CYCLING ARE BOOMING

**1.3M new bikes sold** during lockdown (Cycling Weekly), and cycling short searches continue to grow (this is fashion as well as function, mind). Winter is seeing sustained increases relatively to previous years.

- Cycling Industry News expects that **72.4% of current home workers** will continue their cycling interest post lockdown
- Google searches for running trainers doubled and cycling shorts nearly tripled between February and June. Whilst running shoes have plateaued, cycling shorts remain on the rise

# VIDEO CALLING: UNMUTED

All of the services continue to see markedly elevated levels - Zoom being the clear winner with consumers. What's changed is the novelty (people no-longer talking about it endlessly) and group activities - zoom quizzes are soooo April 2020... But, thanks to technology we were more socially connected than ever

- 18% of people tried video calling for the first time at the start of lockdown ([EY - 7 impacts of COVID-19 on the UK digital household](#))
- Mentions of online (pub) quizzes halved in June
- Teams has amassed over [115 million daily active users](#) in 2020



# VIDEO TECH: THE GAME IS ON

Gaming has boomed – but interestingly it isn't just console gaming... Casual gaming has grown – predominantly on mobile – at an even stronger rate than console gaming. Many of these people don't see themselves as 'gamers' – which presents interesting opportunities to engage them

- Chess videos have been watched [more than 350 million](#) times worldwide on YouTube since January (YouTube data)
- Kingscrusher, run by British chess obsessive Tryfon Gavriel, has seen gains of over [10,000 views](#) per day (Social Blade)
- Chess is now one of [the top 20 games](#) streamed on Twitch, with the number of hours watched increasing from around three million in March 2020 to more than eight million in May (Twitch data)



# NETFLIX: DOWNLOADED

Older viewers, who typically watch more traditional broadcast TV, increased their use of streaming platforms, too

- One third of 55-64-year-olds, and 15% of 65+ used subscription services in the early weeks of lockdown ([OFCOM, Media Nations 2020](#))
- As lockdown measures eased at the end of June, the uplift in streaming services held firm – **up 71%** on the same time last year.
- 55% of UK adults with new streaming subscriptions said they'll keep them and watch the same amount of content ([OFCOM, Media Nations 2020](#))

# SOCIAL MEDIA: MESSENGERS ON THE RISE

The way we are using social media has also changed as a result of the virus, with more and more people using social media to keep up-to-date with news during the outbreak and to move away from landline calls and text messages in favour of WhatsApp and Facebook Messenger.

Despite 'fake news' discussions, we even turned to Instagram to stay up to date on the news-cycle.

- At the peak of lockdown (April) 1 in 3 adults in the UK were using social media for news updates (GWI data June 2020)
- About **one-in-four 18-24-year-olds** in the U.K. (24 percent) reported using Instagram as a news source during the first week of July
- **Nearly half of UK adults** used WhatsApp to make video calls at least weekly, 41% used Facebook Messenger and 30% Apple's FaceTime

# THREE STATES AND BEHAVIOURS

We've been far more emoji-nal during lockdown. We reconnected with local communicates (digitally) and we've expected more from ourselves (OneFifty Twitter analysis).

- Emotional tweeting - We've been more emoji-nal during lockdown (😭 +60%, 😨 +79%)
- 428% increase in mentions about helping our neighbours
- 116% increase in 'cleaner living' mentions

# ONLINE LEARNING: STRICTLY PROFESSIONAL

Whilst schools doing so is by necessity, adult learning for professional topics (food hygiene, excel etc) has surged, and remains high. There is no evidence of people doing so recreationally, however, so all those dreams of learning Italian have remained distant aspirations...

Creativity, however, was unleashed and we witnessed an explosion of creativity during lockdown

- Mentions of people completing an online course on Twitter in Q2 2020 increased by 209% vs Q1 2020
- Search intent for online classes or coursera remained high (nearly doubled on pre-pandemic levels). English, business, first aid, food hygiene, marketing, and excel courses were the top 6 most searched skills. There is little evidence that people got into learning new languages (OneFifty research)

# ONLINE SHOPPING: A CLICK AWAY

For the older audience they've done it, liked it, are sticking with it. Customer concerns are shifting from the health consequences of the pandemic to its financial impacts .

- **Online accounted** for 33.4% of all retail in May 2020 – the highest on record (ONS)
- In April, mentions of online shopping on Twitter were up 384% vs the same period last year (OneFifty research). When referencing food it was up 2663% year on year
- 7M people in UK say they will shop online more frequently post COVID-19 (GWI data June 2020)
- 31% of 56+ will shop more digitally ([ChannelAdvisor](#))



# BRITAIN GOES CONTACTLESS IN 2020

There's no doubt cash is increasingly on the way out, something only quickened, rather than caused, by the coronavirus.

- Close to a fifth of UK adults were registered for mobile payments last year (UK Finance), and nearly four in five who had done so made a payment
- Research from the payments processor Worldpay found 45 per cent of UK Gen-Zers, 32 per cent of millennials and even a fifth of baby boomers have made payments using digital or mobile wallets, suggesting it is not just teenagers and twenty-somethings happy to tap their phone to pay. Its own data found £4billion was spent through contactless payments in the UK in July, double the just over £2billion spent that way in April

A hand holding a beer bottle against a sunset background. The hand is wearing a dark, patterned sleeve. The background shows a blurred landscape with mountains and trees under a warm, orange and yellow sky.

## DRINKING: I'LL HAVE A TOP UP

We're drinking more. The mix of drinks remains typical of off-trade, with usual seasonality (warm weather = cider, beer, rose). People have traded up from lager to craft beers, but no evidence of the same in wine or spirits. This surge seems to contrast with the macro well-being behaviour, but also should be taken seriously on a habit-level...

- 38% of Brits said they drink the same amount of alcohol, 35% drink more, 22% have cut back, and 5% stopped ([YouGov](#))
- Since the beginning of lockdown, we have seen searches for beer overtaking those for gin. In June, searches for beer remained 25% above Q1 levels. 'Beer delivery' and 'craft beer' were the two most popular searches. (Google trends - June 2019-2020)



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# LOST

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## GYMS/GROUP EXERCISE: I'LL SWEAT ALONE

A)the longer they're shut, but b) more people have exercised than before, for free. Exercise is one of the stronger habit formers - endorphins etc - so this disruption feels likely to be pretty permanent - 76% of people have tried working out at home during the pandemic—and crucially, 66% prefer it (The New Consumer).

PTs should be fine - they just shifted their delivery to online



HABITS/

# FROZEN



# TRAVEL: COME FLY AWAY

People still want holidays (bookings surge) - and they're happy to go abroad (Eurotunnel record bookings, plus double discussion of intent) - it's airplanes and trains people are nervous about, i.e. it's the exposure to people, not the act of travelling. These will come back as the virus goes...

- In the last weekend of June, [Eurotunnel](#) reported record number of bookings
- The last two weeks of June saw 10.2K social mentions discussing public transport. 1 in 3 explicitly mentioned the term 'safety' (OneFifty research)
- In August, UK searches for '[country holiday](#)' surpassed the term 'city break' for the first time in over 10 years
- Business travel is back. Emirates' Airbus A380 superjumbos are two-thirds full in the posh seats, says Tim Clark, the airline's CEO in Jan 2021
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# THE OFFICE: HIBERNATING

There's a lot said about this, but the evidence seems likely for modest change, over several years. The office isn't dead, it's just hibernating.

- A study by O2 found 63% of people would happily live more than an hour away from the office if flexible working was introduced in the future
- 1 in 5 workers in the UK were often travelling abroad for work; almost half believed these meetings could have been as productive held virtually
- More than three quarters of people consider environmental awareness to be a key factor when looking for a new job
- Eight in 10 firms are expected to adopt a hybrid-working approach in future, up from three in 10 pre-Covid, while an "office-first" working culture will be promoted by just 10% of firms surveyed (Cushman & Wakefield)



## ENVIRONMENT: SAME SAME

No evidence of any meaningful shifts in attitudes - you're going to do whatever you did (or didn't) before. We're no thriftier - attitudes towards leftovers haven't changed. e.g. Environmental problems remain the top fear in World Economic Forum annual risk report

# BANKS: IT'S CHALLENGING

Unlike 2008, there's no shift in attitudes or behaviours around financial institutions. While the pandemic has boosted adoption of challenger banks, it's been a zero-sum game for Monzo et al, although they've better harnessed progressive causes for brand marketing. 2021 will be a break-or-make for challenger banks

- People are still nearly twice as likely to receive their salary through a traditional bank (57%), whilst they are 8 percentage points more likely to manage savings and investments there. (GWI data May 2020)
- Whilst those talking about traditional banks were issuing frustrations at wider scale financial issues (such as COVID loan applications), challenger banks have been much more involved in social movements which has attracted positive sentiment

# SAVING VS SPLURGING: MY PIGGY BANK

Record UK household savings during lockdown are both a reaction to uncertainty (hoarding) and necessity (couldn't confidently buy big ticket items or lifestyle indulgences). No strong evidence these are long term shifts, however, to a more frugal, less credit-driven society. Younger people aged 18 to 34 to have been the keenest savers of all age groups.

- 35% increase in Twitter mentions about savings (May-July) compared to the same period last year. They focus on concern about needing to delve into savings, as much as it is those enjoying more savings as their net spend decreases (Meltwater - May - July 2020)
- [The Bank of England](#) said the average households saved 200% more during lockdown. Younger people aged 18 to 34 to have been the keenest savers of all age groups.
- No strong evidence these are long term shifts, however, to a more frugal, less credit-driven society.





# THE AGE OF URBAN MIRACLES IS NOT OVER

Very modest discernible shift in attitudes around urban life, or its appeal...  
the methods of buying haven't changed. Scour the apps, view in-person

- [Zoopla data](#) shows that the strongest surge in sales has occurred in cities in North England, such as Manchester, Leeds and Sheffield
- Footfall at retail and leisure locations in the City of London was 83% lower in the middle of December (Google Mobility Report)

# ONE FINAL STAT...

Sales of alarm clocks have dropped 49% on pre-lockdown levels as we all enjoyed a lie in while working from home ([The Times](#)).

HABITS/

# SUMMARY



# REVOLUTION?

- Change is subtle and slower than we think
- Habits are a big reason
- This is a well-being shift for Britain especially, other European countries to a significant but less pronounced degree – macro-trend accelerated
- Online retail has accelerated 5 years, through adoption across nearly every cohort, rather than just younger
- How we communicate and network likewise has shifted through widespread network effects, taking online behaviours which were the younger and tech-orientated to the older masses







# THANK/YOU

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