LiveArea

PFS

PFS and LiveArea Research Report

Brand Loyalty

Engaging the New Conscious Consumer

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Introduction

Consumer loyalty has been put to the test in 2020. The ability to browse and buy from go-to retailers and brands has been hugely disrupted, with the initial closure of non-essential stores and the more recent realities of the post-pandemic retail experience. A reliance on online shopping has had a significant impact on consumer purchasing habits, with more options available at the click of a button. As a result, consumers have needed to evaluate what is most important to them when making a purchase: deciding where to shop and which brands to support.

When it comes to brand loyalty, consumers now have new factors to consider, such as how well a retailer responded and acted during the COVID-19 pandemic and the extent of their ethical actions. With more of us turning to online retailers and brands over the past six months, the spotlight has been cast on those that have supported consumers during this period, by staying in regular contact and personalising their communications, as well as those who have supported their staff and been transparent in how they work with suppliers and partners along the buying journey. It has also made consumers aware of brands that have missed the mark with their reaction to the pandemic.

This report will focus on the impact of online retailers' and brands' actions on customer loyalty. What is the depth of feeling among consumers about how retailers have reacted to the pandemic? Do sustainable and ethical initiatives foster increased brand loyalty? And what more should online retailers and brands be doing to keep customers loyal during uncertain times and beyond?

Methodology

PFS and LiveArea commissioned research agency, Arlington Research, to survey 2,500 consumers about their current shopping habits, environmental and ethical expectations from online retailers and brands, and how their buying behaviour has changed during the Coronavirus pandemic.

Nationally representative interviews were carried out with adults aged 18 and over, with quotas set on gender, age and region at a country-wide level. Respondents came from the UK (1,500 respondents), Republic of Ireland (500 respondents) and France (500 respondents). Fieldwork took place between 28th May and 4th June, 2020.

Age groups referred to throughout the report are broken down as follows:

Generation Z
Respondents born between 1994 – 2001

Millennials
Respondents born between 1980 – 1993

Generation X
Respondents born between 1965 – 1979

Baby Boomers
Respondents born between 1946 – 1964

Silent Generation
Respondents born before 1946

Key Research Findings

- **64%** of consumers are more likely to buy from online retailers and brands that stay in touch and offer frequent order updates

- Four in ten **(42%)** consumers want brands to personalise their customer messaging

- **58%** feel greater loyalty towards online retailers and brands that have helped people during the pandemic

- **59%** of consumers are encouraged and feel greater loyalty to online retailers and brands that have demonstrated their commitment to the safety of their staff through this crisis

- Three in five consumers **(59%)** are more forgiving of online retailers and brands during peak times and times of crisis, such as the COVID-19 pandemic

- Half of consumers **(50%)** are more likely to recommend a brand to a friend based upon how they responded during the pandemic

- Generation Z and millennials are more likely to recommend a brand to a friend than any other age group (**60%** of Generation Z and **60%** of millennials) based upon how they responded during the pandemic

- **49%** of consumers are more likely to share all negative online shopping experiences with their friends and family

- Around half of consumers prefer buying from online retailers and brands who are transparent about what they do with returned items **(51%)** and the origin/journey of products they buy **(56%)**

- **53%** of shoppers favour online retailers and brands that have responded ethically to what's happening in society

- Over a third **(38%)** of consumers have shopped with new online retailers and brands as a result of the pandemic and will continue to do so

1

Keeping Customers Close

Keeping Customers Close

Building a loyal and committed customer base is a key part of online retailers' and brands' success. To keep shoppers coming back time and again, they need to be engaged in more than just the products you sell. What the brand stands for and how it interacts with customers, staff and suppliers will make the difference between an occasional buyer and loyal brand advocate.

Our research suggests that the personal touch still plays a huge role in brand loyalty. Almost two-thirds **(64%)** of consumers are more likely to purchase items from online retailers and brands that stay in touch and offer frequent order updates, for example. When broken down into the different age groups, it is the older generation who value this type of communication the most. Over two-thirds **(69%)** of the silent generation agree that they are most loyal to brands who stay in touch and keep them updated on the progress of their orders compared to **56%** of Generation Z.

When it comes to other forms of communication, two in five consumers **(42%)** want brands to personalise their customer messaging, rising to **46%** in France and over half of millennials **(52%)**. This is where understanding the customer is so crucial in order to provide a customised proposition. The data gathered from loyalty programmes typically plays a key role in ensuring communication remains effective and personalised.

The nature of incentive schemes has changed significantly over the decades, but the premise remains the same – to provide enhanced insights and data about shopping habits so that retailers and brands can tailor offers and communication with those who sign up. In recent years, beauty brands have used this tactic successfully to build brand loyalty and advocacy. For example, Lancôme Elite Rewards programme excites and delights customers with generous rewards and free shipping options.
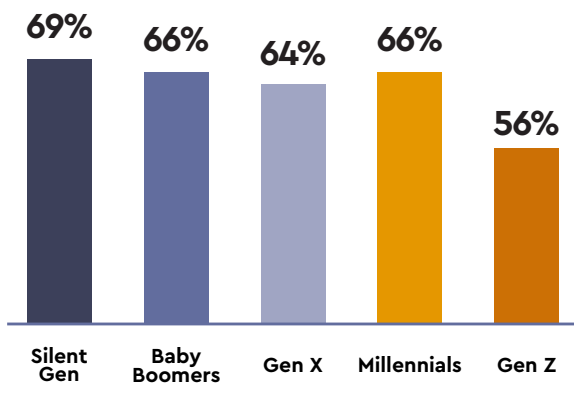
64%

of consumers are more likely to purchase items from online retailers and brands that stay in touch and offer frequent order updates

However, in addition to the personal touch, communicating ethical factors also plays a part in how consumers decide where to shop. Four in ten **(40%)** prefer to spend with ethical retailers instead of those who mostly run frequent promotions. This suggests that getting the balance right when it comes to cost and appealing to the conscious consumer is important. Both of these elements should play a part in communicating with consumers to shape a successful strategy for engaging and retaining loyalty among an online audience spoilt for choice.

This will be especially crucial to get right during peak times, including Christmas and Thanksgiving, when retailers' promotions need to stand out and deliver increased sales. Online retailers and brands who can reflect the needs of the post-pandemic shopper, with effective and ethical-focused communications, will be the ones to succeed in maintaining long-term relationships.

I am more loyal to online retailers and brands who keep me regularly updated on the progress of my orders.

The link between loyalty and brand values is a key strategy for retailers such as Patagonia. Stories and company ethos take centre stage for the outdoor apparel retailer. These messages are the focal point of the brand's homepage and social media content, even before you get to its products. Via the website and by subscribing to the brand's communication channels, customers are kept engaged with not only product news and offers but original stories and activism awareness updates. The brand takes shoppers on a journey and draws them into supporting its efforts and remaining loyal.

All touchpoints in the customer buying-cycle need to be consistent to maintain loyalty – from the website, social and email engagement, through to customer service and product delivery. The right balance is needed to appeal to today's conscious consumer which means more than just ticking boxes. Clear communication at every stage with a focus on effective customer care and service, which reflects what the company stands for will give online retailers and brands the edge.

How you Communicate

Beyond the type of communication itself, it's how you communicate to your customers that's important and how you address their demands. You have to rethink the drivers of loyalty and affinity for your brand. That means leading with purpose and building new levels of trust and respect with your customers. Create a meaningful impact in the way your brand operates because loyalty requires brands to show they are human to the core.

Your communication needs to be benefits-oriented. Value-based communications help customers understand what your brand is about, what they can expect from you, and why they need you. Brand trust is the degree to which customers believe that a brand can provide the required value, as emphasised by **Doney and Cannon (1997)**.

Benoit Soucaret
Creative Director at LiveArea

Stay in Touch

64% of consumers are more likely to purchase items from brands who stay in touch and provide frequent order updates. Ensuring you proactively keep customers informed of order delays or other potential issues, especially during higher volume periods, not only improves your reputation in the eyes of customers, it also helps mitigate excessively high volumes within the contact centre.

For example, during the first few weeks of the COVID-19 outbreak in Europe, brands who were proactive in notifying customers about delays due to supply chain disruption or carrier limitations were able to help customers set realistic expectations. For the most part, when adequately informed, we found that customers were much more understanding.

Brands are better equipped to provide this proactive communication when they maintain a holistic approach to eCommerce. Within an end-to-end operation, all areas of the business remain connected, from website design and email marketing, to fulfilment operations and customer care – and everything in between. When an issue comes up in the distribution centre, all areas are notified and can quickly perform the appropriate steps, such as updating the website, sending out email notifications, or simply informing customer service agents so they can best support customers. An end-to-end solution streamlines your eCommerce operations for a more seamless customer experience.
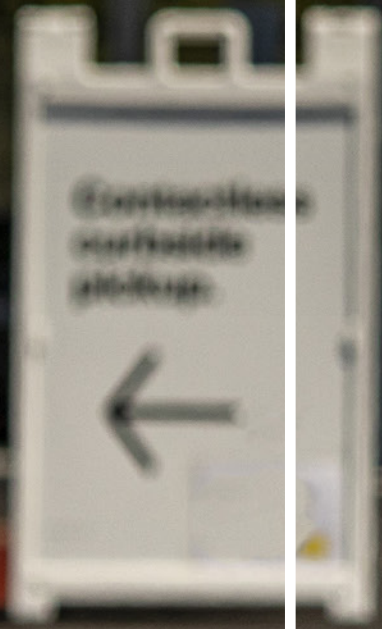
Christophe Pecoraro
Managing Director at PFS Europe

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The Impact of a Crisis

The Impact of a Crisis

The COVID-19 pandemic has affected buyers and brands in different ways, but how online retailers have behaved during this time looks set to have a marked influence on their reputation and how consumers shop now and in the future. The current crisis has only reinforced the questionable behaviour of some brands, such as Sports Direct and other retailers who have been accused of failing to meet the welfare needs of staff during the pandemic; and shone a light on others, including food retailer Co-op who took on an extra 5,000 staff and offered temporary employment to hospitality workers who had lost their jobs, among other initiatives.

Our research suggests that the current crisis has had a positive effect on consumer ethics. Brands that have actively helped communities and staff during the pandemic have not gone unnoticed by consumers – regardless of who they currently shop with for essentials, clothes and more. With the older generation more at risk during the pandemic, the reliance of this demographic on online shopping and deliveries has been more necessary than most. It is therefore not surprising, but very encouraging, to see that seven in ten **(71%)** of the silent generation feel greater loyalty towards online retailers and brands that have helped people during the pandemic – compared to six in ten consumers **(58%)** overall.
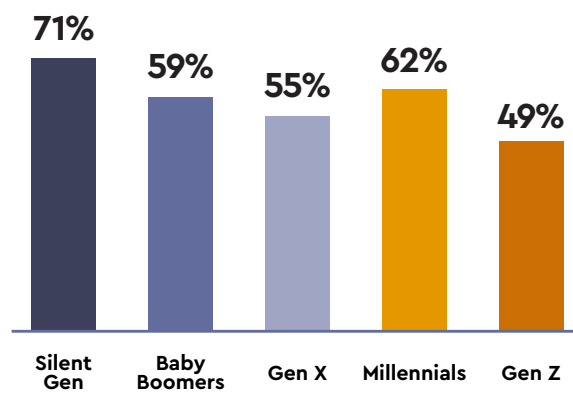
This is great news for retailers who actively reached out to the older generation during lockdown and suggests that brand advocates among this age group could remain strong and even grow as a result. Supermarkets have been in the spotlight for reacting quickly with delivery slots for the elderly and special opening times or days, but many have gone further in their efforts to support their communities. Morrisons, for example, was one of the first retailers to offer food parcels to at-risk customers, and also took on 500 charity shop workers from Marie Curie and CLIC Sargent – paying their wages for 12 weeks – to help older and vulnerable customers in its stores.

71%

of the silent generation feel greater loyalty towards online retailers and brands that have helped people during the pandemic

In addition to supermarkets, brands including many fashion retailers have also supported the cause by putting their production lines to use making vital equipment for the health service and front line staff including masks and gowns, such as Zara's parent company Inditex and high-end brand Prada. Beauty brands also joined the fight with L'Oréal producing hand sanitiser to distribute throughout Europe, and LVMH – the group behind luxury brands including Louis Vuitton, Givenchy and Christian Dior – manufacturing and distributing hand sanitiser to French health authorities for free, in response to the shortage.

When it comes to how retailers have treated their employees, six in ten **(59%)** shoppers are encouraged and feel greater loyalty to online retailers and brands who have demonstrated their commitment to the safety of their staff throughout the crisis. Interestingly this is also supported most by the silent generation **(69% agree)**. Consumers in France, however, seem less likely to feel loyalty towards brands due to their commitment to staff safety **(52%** of those in France feel loyalty compared to **60%** in the UK and Republic of Ireland); or if they have helped people during the pandemic **(52%** of those in France compared to **59%** of those in the UK and Republic of Ireland).

The efforts of retailers during the pandemic, to keep products moving, seems to be highly valued by consumers

71% 59% 55% 62% 49%

| Silent Gen | Baby Boomers | Gen X | Millennials | Gen Z |

I feel greater loyalty towards online retailers and brands that have helped people during this time.

During the pandemic, online retailers and brands have been at the forefront of providing much needed essential and non-essential supplies straight to consumers' doors. The efforts of retailers during this time, to keep products moving, seems to be highly valued by consumers with almost three in five **(59%)** appearing to be more forgiving of brands during peak and difficult times – although slightly less so in France **(55%)**.

Despite this seemingly forgiving attitude, online retailers and brands need to ensure they remain responsive and ready to deal with future challenges – including peak shopping season and the fall-out of Brexit negotiations – which could have an impact on deliveries and product lead times once again. Consumers might be more understanding during a global pandemic but when 'normal' service resumes, this attitude might change. Brands that are agile and arm those on the front line – including customer service teams – with all they need to maintain consumer loyalty will keep shoppers engaged during good times and bad.

Employee Value

Valuing your employees should be a high priority as this translates to customers as a reflection on themselves if they support your brand. Consumers want to support brands who can make them feel that they are prioritising social responsibilities through their shopping habits. 59% of shoppers feel greater loyalty to online retailers and brands who demonstrate a commitment to employee safety during COVID-19. Brands should not hesitate to do everything in their power to prioritise the wellbeing of employees.

Many brands have transitioned their customer service operations to work-from-home solutions that ensure the safety of employees while continuing to support customer needs with quality care. PFS, for example, transitioned 30 brands to work-from-home support within just two weeks of lockdown coming into force. Surprisingly, what was originally embraced out of necessity has actually had many unexpected benefits to our customer service operations. Agents are happier and the benefits of the work-from-home environment are apparent through lower attrition rates and improved SLA performance overall.

Christophe Pecoraro
Managing Director at PFS Europe

Agile Innovation

Instead of gathering consumer feedback via surveys, do it on social media. Facebook saw a 37% increase in usage since the COVID-19 crisis began. This provides an opportunity for brands to tap into insights from these platforms, to rapidly understand the consumer point of view and create new ideas.

Companies should also adopt agile innovation. The sooner brands can meet customer needs, the better off both will be. This means accelerating time to market for new customer experiences, quickly prototyping and iterating, and releasing innovations in their 'minimum lovable' state, rather than waiting to perfect them. Building agility across different functions to manage changing needs is vital. Additionally, brands need to have a strong innovation pipeline that lines up with the new post-COVID-19 reality which is all about remote, digital, or home delivery trends.

Benoit Soucaret
Creative Director at LiveArea

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Bad News Travels Fast

Bad News Travels Fast

How brands act and behave has a marked impact on consumer confidence and in turn loyalty. The prevalence of social media to voice opinions, coupled with online ratings for products and purchases, has made the process of complaints and compliments shift from pure word of mouth to instant online amplification.

Sharing experiences – good or bad – is a key element of driving brand loyalty and the actions of brands during the pandemic has certainly been put in the spotlight. Retailers' response during the pandemic has a huge impact on consumers' likelihood to recommend that online retailer to a friend.

Our research suggests that this is even more apparent within the younger generation. Generation Z and millennials are more likely to recommend a brand to a friend than any other age group, based upon how they responded during the pandemic (**60%** of Generation Z and **60%** of millennials, compared to **50%** overall). Consumers in France **(55%)** are also more likely than those in the UK and Republic of Ireland **(49%)** to take into consideration how a business has responded to the pandemic when recommending that business to someone else.

When it comes to sharing shopping experiences with others, around half of consumers **(49%)** share negative online shopping experiences with friends and family (**51%** of those in France and **49%** in the UK and Republic of Ireland). This however rises to **57%** of millennials. This increased word of mouth can be detrimental to brand reputation if the right action is not taken to provide resolutions efficiently and effectively, to appease affected customers.

49%

of consumers share negative online shopping experiences with their friends and family

To help brands manage the impact of negative experiences and remain responsive to any comments made via online and social media channels, informed and empowered customer service representatives could make all the difference. As front line staff, they need effective tools and processes to ensure that any complaint made can be resolved efficiently. This includes phone, email, live chat and chatbot support to provide customers with easy touchpoints to engage with a brand if they need an issue resolved and to minimise the risk of them running straight to social media or friends and family to vent frustrations.

In addition, customer service representatives need to feel supported with wider insights and data about customer sentiment and reaction to the brand. Social listening tools can help to collect and analyse data to not only manage a potential crisis on social media, but to build brand reputation and understand customers' needs better. This will help agents keep up with social media complaints, especially during peak times and times of crisis, to prevent them spiralling out of control or providing an outlet for customers to complain about a product, promotion, celebrity endorsement or brand actions.

Reacting quickly to nip any issues in the bud is essential, but it is also important for brands to use customer interactions to inform strategies and ensure that the overall brand message is consistent and resonating across all channels. With consumers more aware and influenced by brand ethos and actions, every touchpoint and form of communication needs to be aligned with brand values and consumer expectations.
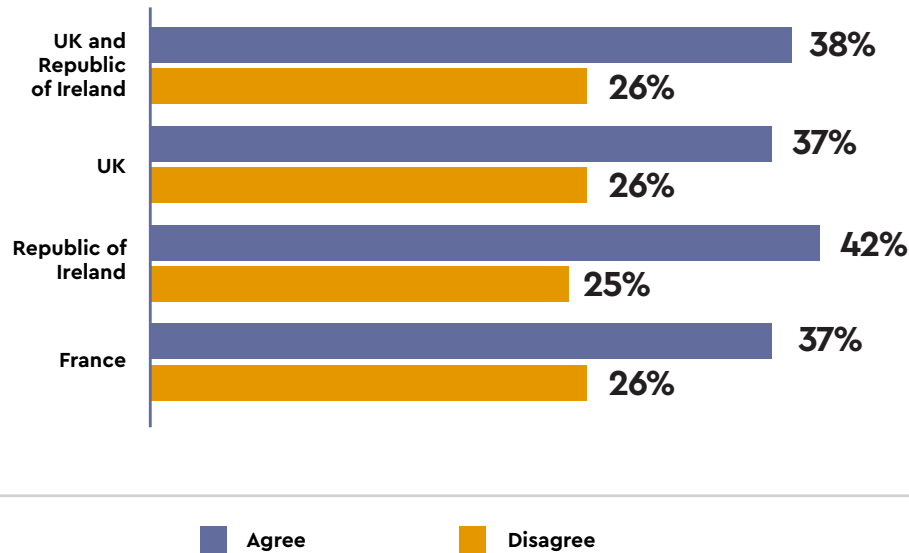
Many beauty brands, for example, use social media interactions and complaints to make positive changes in response to customer needs. Lancôme developed new customised foundation technology in response to customer frustrations vented online, and Glossier introduced a recycling programme and a packaging opt-out option, in response to public callouts on its packaging policies.

It is important for brands to use customer interactions to inform strategies and ensure that the overall brand message is consistent and resonating across all channels

69% Silent Gen
66% Baby Boomers
64% Gen X
66% Millennials
56% Gen Z
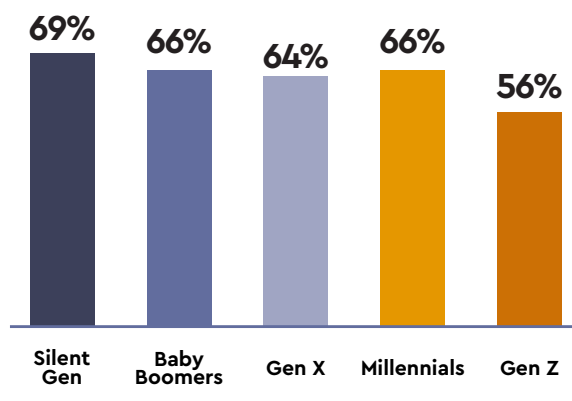
I share all negative online shopping experiences with my friends and family.

I have shopped with new online retailers and brands as a result of the pandemic and will continue to do so.

UK and Republic of Ireland
- Agree: 38%
- Disagree: 26%

UK
- Agree: 37%
- Disagree: 26%

Republic of Ireland
- Agree: 42%
- Disagree: 25%

France
- Agree: 37%
- Disagree: 26%

■ Agree ■ Disagree

Taking these measures will ensure customers feel valued and that the right response has been taken to any complaint or issue. Only then are they likely to become a repeat purchaser and recommend the brand to someone else.

Consumers also value authenticity and expect retailers to be transparent about the origin and end of life of the products they buy. **53%** of shoppers favour retailers that have responded ethically to what's happening in society, with a similar number preferring to buy from transparent online retailers and brands – whether it's being open about where returned goods end up **(51%)**, or the origin of products and how they reach them **(56%)**.

The pandemic has also resulted in increased support for smaller businesses, with two in five **(41%)** consumers in France supporting smaller retailers, after moving away from larger businesses, compared to a third **(34%)** of consumers in the UK and Republic of Ireland. This suggests that they have been enticed to not only try but stay with different retailers, post-pandemic. Indeed, for **38%** of consumers, the pandemic has seen them shop with new online retailers and brands, which they will continue to do so in the future.

Loyalty Programs

Customer loyalty programs provide an opportunity for brands to use relevant information to personalise the customer journey. They also have the benefit of streamlining the buying process and by storing payment information customers can quickly make purchases. With regards to the best approach to take, conscious consumer consumption habits are guided by how the product was made, where it was sourced and who made it. Therefore, there is a growing demand for higher transparency of companies' sustainability practices within a new generation of consumers. Conscious consumers are choosing to support brands that align with their own values, whether that's reducing excess packaging or lowering their carbon footprint, for example.

Benoit Soucaret
Creative Director at LiveArea

49%

Negative Experiences

When it comes to sharing shopping experiences with others, around half of consumers (49%) share negative online shopping experiences with friends and family. It is therefore increasingly important that brands' customer service operations are equipped to help combat this negative sharing on social platforms.

Provide empathy training for customer service agents to ensure angry customers feel heard when they interact with the brand directly. Frustrated customers who are denied the opportunity to voice their complaints through the contact centre will often take to social media forums instead. For complaints that do make it to social media, brands and retailers must be appeasement-centric, particularly when it comes to managing social platforms. Social listening should be a priority, it's important to act quickly to appease customer complaints and minimise long-term repercussions to your brand's image.

Christophe Pecoraro
Managing Director at PFS Europe

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Remaining Agile and Responsive

Remaining Agile and Responsive

Being responsive in times of crises is key for brands to continue to grow their business and customer base in often challenging circumstances. To ensure this can happen there are a number of key questions to ask and steps to take to make positive moves towards engaging customers and retaining loyalty.

What lessons can online retailers and brands learn from smaller or new retailers in being more agile and quick to respond to changing circumstances?

Effective communication and transparency are vital to keep customers engaged, particularly as a business grows. But this can become more challenging as a company evolves and can often become a lower priority, despite being top of the consumer agenda.

Having a model in place to enable agility and scalability will help alleviate the pressures on brands during peak times and ensure that communication channels remain effective and fit for purpose as a brand grows.

The PFS customer service growth model, for example, enables brands to augment contact centre staff to support both forecasted and unplanned growth, by placing additional agents into an existing model to alleviate some of the pressure at peak times. This support can be scaled up or down according to brand needs throughout the year, to ensure customers receive the same high level of service they expect at all times.

How can online retailers and brands provide consumers with the personal touch they seek?

Personalisation means much more than just keeping in touch with consumers and updating them on products or services which might be of interest. Understanding their needs and offering additional services and options for personalisation can give online retailers and brands the edge in maintaining loyalty.

Brands who find unique ways to allow customers to customise and personalise their orders will excel in creating a loyalty-inspiring customer experience. The right third-party logistics providers can enhance the fulfilment operation with value added services, such as personalising products with engravings, monogramming or embroidery, or by supporting custom kitting and bundling solutions, offering high-end gift wrap options and more.

What role does technology play in helping online retailers provide a positive experience and keeping customers engaged for the long-term?

Investing in the right technology innovations to support key areas of the business is a vital part of ensuring business growth and keeping up with customer demands. For example, providing accurate sizing guides and other relevant information pre-purchase will lead to an improved customer experience. Augmented and virtual reality applications are going to become increasingly important in helping online retailers and brands provide a higher quality experience online as well as improving customer support services.

As the more conscious consumer continues to seek not only open communication and transparency, but products based on cost and conscience, non-traditional fulfilment methods will become increasingly embraced. Buy-online-pickup-in-store (BOPIS) functionality and ship-from-store technologies, for example, equip brands to better serve customers through an improved delivery experience during normal and peak periods.

Conclusion – Preserving Loyalty Through Positive Actions

Brand loyalty, trust and reputation are built on many things. Retailers understand that loyalty can take years to build but seconds to break. The pandemic has highlighted the need for retailers to respond quickly to changing circumstances whilst enhancing their level and tone of communications, interactions and compassion with customers and communities. Only then will they retain them for the long haul, creating brand advocates and ambassadors.

Understanding customers and responding in the right way at the right time is crucial. Customers want personalised communications and also want to feel special. They prefer to shop with businesses that demonstrate authenticity and ethical values and take relevant actions for the good of the wider community.

Negative experiences have a lasting impact on consumers and shape their perceptions of a retailer. The current climate has given consumers reasons to shop around online and rely on those retailers who can deliver on their promises. One bad experience can have long-term effects on reputation and loyalty and in times of crisis, all eyes are on how brands react and respond to the changing landscape and to keep up with demand.

Whether it's dealing with negative comments or engaging shoppers in the latest product campaign, the type and style of communication deployed by brands today needs to be effective in taking consumers on a positive journey and pledging their support for brands in the long-term. This means having clear and consistent website content which sets out brand values and is transparent about sustainability and ethical initiatives at every stage of the buying cycle. Social media channels need to reflect this strategy by not only pushing relevant and relatable content to consumers but responding to comments levied at the brand – good or bad – authentically and honestly.

To ensure the message and response remains consistent, and that communication levels do not drop as a brand grows or is faced with challenging circumstances, investing in the right customer service support will be crucial in creating advocates inside and outside of the brand. Phone, email, live chat and chatbot support, as well as social listening tools will give consumers confidence that brands are responsive to their needs, as well as arming customer service representatives with the methods needed to react quickly and effectively to changing demands and market challenges.

In a world where good news travels fast and bad news even faster, taking a proactive and authentic approach to communication will be the difference between surviving and thriving in the new world of retail. A positive brand experience is the only way for retailers to build consumer loyalty and an agile and responsive customer service model is the best way to ensure this can happen.

Social Listening

One thing our research really highlights is that what consumers say does not always match up with what they actually do. For instance, while 59% say they are more forgiving of online retailers and brands during a crisis, nearly half (49%) also said that they are more likely to share all negative experiences with their friends and family.

Additionally, while they may say they are more forgiving, they may not stick around to give you a second chance. 38% of consumers have shopped with new online retailers and brands during the pandemic and it is likely that many of these new shopping experiences were a direct result of previously preferred sites being unable to meet their needs.

Brands must learn to listen to consumers while also interpreting their actions to determine how to best serve their needs and encourage customer loyalty. A solid social listening practice is a must, to ensure you are seeing the full picture. By monitoring what consumers are saying about you, your industry and your competitors, you can better understand what's driving your consumers and tailor business practices to those factors – ultimately driving increased loyalty that grows your business for the long haul.

Christophe Pecoraro
Managing Director at PFS Europe

Corporate Social Responsibility

Maintaining a strong customer experience requires relevant and timely research to understand changing behaviours and new pain points, as well as agile processes and innovation to address them. Brands who can manage that approach can create value for their consumers amid increased competition. Customer loyalty has become a strategic tool to sustain in today's competitive environment, followed by effective corporate social responsibility initiatives (CSR), brand attitude and brand image.

Brands that behave ethically increase positive word-of-mouth and customer commitment. Perceived quality and greater loyalty also boost positive conversations about the brand. CSR influence stimulates the positive relationship between the customer and the company, and its products and/or services.

Likewise, CSR has a positive relationship with purchase intention and customer relationship intention. The Impact of Corporate Social Responsibility on Customer Loyalty: The Mediating Role of Corporate Reputation, Customer Satisfaction, and Trust study shows CSR initiatives are significantly and positively associated with corporate reputation, customer satisfaction, and customer trust. High corporate abilities with well-executed corporate social responsibility initiatives lead to high loyalty.

Benoit Soucaret
Creative Director at LiveArea

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