

BRITAIN THROUGH THE LOCKDOWN



The past few weeks have been unlike anything any of us have ever experienced. The COVID-19 pandemic has impacted every part of our lives, from how we communicate to how we live day to day, and even how we keep our children entertained. This time spent at home has in some ways brought people closer together, providing that extra time to call a loved one or spend precious quality time with the family. At John Lewis, we have seen customers coming to us for guidance and advice which is available on the "Your Partners Through It All Hub" as well as items which enable them to keep living their lives. From keeping in touch with work and loved ones driving high demand for laptops and landlines, the country has also been buying gym equipment, self care products and loungewear as people seek comfort and solutions to cope with the evolving environment around them.

SIMON COBLE

Director of General Merchandise

As a food retailer it's our job to keep a close eye on trends. While no-one could have predicted such seismic shifts to all aspects of our daily lives, one thing we've noted across this unprecedented period has been an increase in kindness and compassion. Our research finds 43% of Brits feeling closer to our neighbours and local community since the lockdown began. Two thirds of those have clapped for the NHS and key workers, 43% have shopped for elderly or vulnerable neighbours and half say we simply smile or wave at each other more. We've seen more families taking time to sit down for a meal, baking with children, or friends trying out new cocktails over Zoom. As we've all been physically separated we've reacted by becoming closer, reconnecting through a shared love of food. And we'd say this is a trend that's here to stay.

RUPERT THOMAS

Director of Food & Grocery

COMMUNITY SPIRIT

43% of British people say we feel closer to our neighbours and local community since the coronavirus lockdown began. Of these:

2/3	TWO THIRDS HAVE CLAPPED FOR THE NHS/KEY WORKERS	40%	HAVE THINGS IN WINDOWS SUCH AS RAINBOWS OR TEDDIES
1/2	HALF SAY PEOPLE WAVE AND SMILE AT EACH OTHER MORE	30%	ARE SUPPORTING LOCAL BUSINESSES MORE
43%	HAVE BEEN PICKING UP SHOPPING FOR ELDERLY OR VULNERABLE NEIGHBOURS	21%	HAVE A STREET WHATSAPP OR MESSAGING GROUP
		12%	ARE SUPPORTING LOCAL CHARITIES MORE

WHAT WE'VE BEEN DOING AT HOME



HALF OF US SAY WE'VE BEEN SPENDING MORE QUALITY TIME WITH LOVED ONES SINCE THE LOCKDOWN BEGAN

51%

OF THESE HAVE BEEN COOKING AND BAKING

"With everyone at home together, the kitchen has become the new centre of our world. Food is a huge part of taking care of ourselves and our families, and while we've been in lockdown, our focus has shifted onto making the most of our store cupboards and freezers, while coming up with inspiring and varied dishes to see us through. Deciding what to eat, whether it be baking recipes to keep the kids busy, restaurant-inspired dinners complete with homemade menu cards and wine matching or Instagram-led banana bread and sourdough recipes, we've all taken a little more time over what we're cooking."

ALISON OAKERVEE
Food Editor at Waitrose

THE 'JOE WICKS' EFFECT

From Joe Wicks' 9am workouts to 5km 'run for heroes' challenges, the nation has been finding ways to keep moving and active during lockdown. John Lewis has seen high demand across the retailer's sports category, with gym equipment, training gear, running shoes, smart watches and wireless headphones proving particularly popular.



44%
OF US DOING MORE EXERCISE AT HOME DURING LOCKDOWN

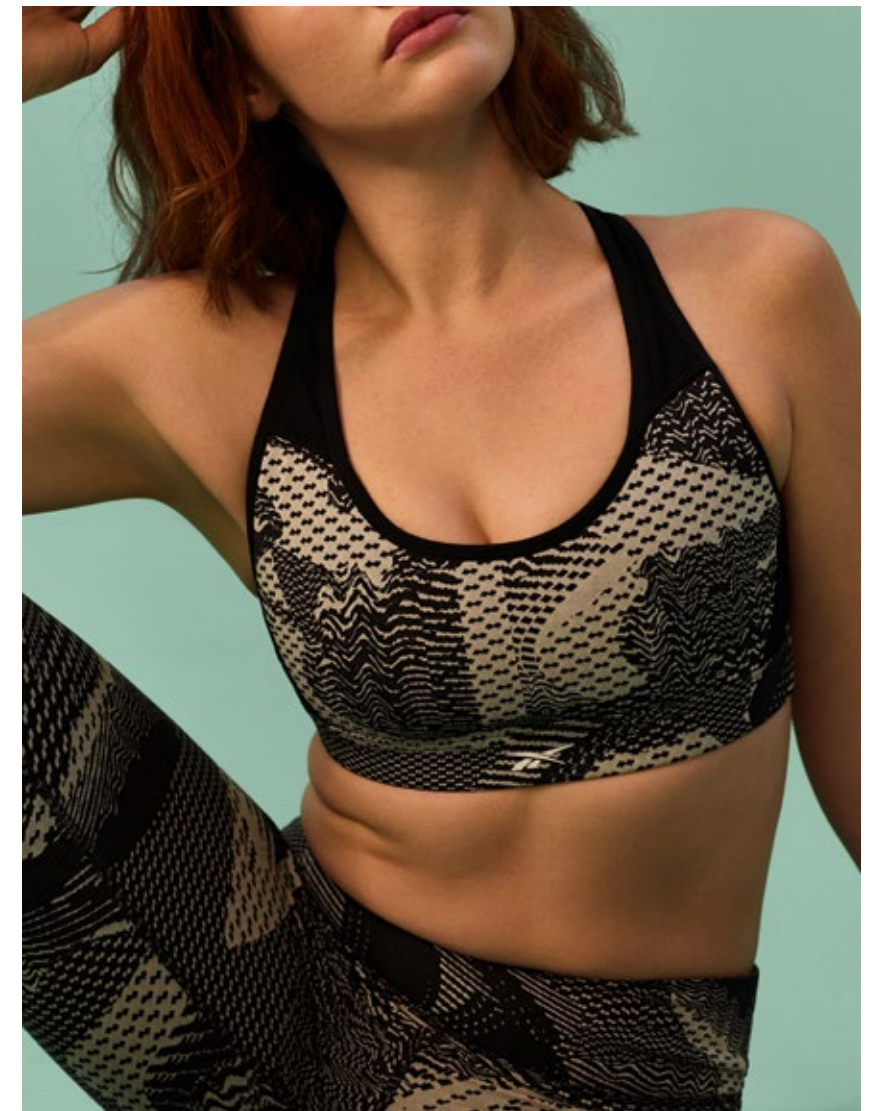
72%[▲]
UPLIFT IN SALES OF SPORTS SHOES

315%[▲]
UPLIFT IN SALES OF YOGA & PILATES EQUIPMENT

496%[▲]
UPLIFT IN GYM EQUIPMENT SALES

BEST SELLER

Reebok adjustable 1kg ankle weights





74%[^]

UPLIFT IN SALES OF
STORAGE SOLUTIONS

36% have been spending quality time with loved ones decorating and rearranging the house. People have been using this time to spring clean and declutter, driving sales of home storage at John Lewis.



39%[^]

HAVE BEEN PLAYING
TRADITIONAL GAMES

"We have seen exceptional demand for puzzles and board games with families spending more time together. There has been a clear sense of nostalgia when it comes to customer favourites."

LUCY BENHAM

Assistant Buyer at John Lewis
Gifts & Candleshop

The most popular board games

1. Scrabble
2. Monopoly
3. Bingo



**BEST
SELLER**
JumpKing Oval
Trampoline

"The Easter holidays saw a spike in demand from parents looking for ways to keep the kids engaged, we saw a flurry of sales for outdoor toys including sales of trampolines which were up five times more than usual as well as crafting and art kits up 186%."

RACHAEL LARKMAN

Assistant Buyer at John Lewis - Toys

63%[^]

UPLIFT IN SEARCHES
ON WAITROSE.COM
FOR 'GROW YOUR OWN'

With searches for vegetable seeds more than 20-fold and bird seed six-fold

43%[^]

SAY WE HAVE BEEN
DOING MORE
GARDENING



MAKE DO AND MEND

As customers are keeping themselves busy during extended periods spent indoors, John Lewis has seen unprecedented levels of haberdashery items including needlepoint sets, sewing machines, knitting yarn and crafting kits.

1430%[^]

SALES OF ELASTIC ARE UP
AS A GROWING NUMBER
OF BRITS MAKE THEIR OWN
FACE MASKS AT HOME



UNUSUAL BUYS

LANDLINES 80%[^]

Landlines make a resurgence in the first week of lockdown with sales up 80%. 48% of those surveyed said that they have been speaking more to relatives who don't live with them.



TEQUILA 175%[^]

Tequila sales have soared 175% at Waitrose, as people host themed virtual parties - from Mexican night to cocktail hour.



DECORATIVE BEDDING 130%[^]

Decorative bedding and pyjama sales rise at John Lewis as customers are kitting out their bedrooms and creating a comfortable space to relax during these turbulent times.



KIMCHI 43%[^]

Searches for kimchi on Waitrose.com have gone up as people experiment with new cuisines.





WHAT WE'VE BEEN EATING AND

45% SAY WE'VE BEEN EATING DIFFERENTLY DURING THE LOCKDOWN. OF THESE:

50%

Say we're working harder to use up ingredients in the cupboard and are more conscious of not wasting food. In light of this, Waitrose.com has seen searches for soup recipes up 51%

31%

Of us have been getting more organised - making shopping lists and meal plans

38%

Of us say we're snacking more, as being home all day sees us more frequently drawn towards the cupboards or fridge

19%

Of us say we now sit at the table for more meals together. John Lewis has seen egg cups and teapots in demand as more families eat breakfast together

12%

Have had to adapt meals to suit fussier eaters, with the household all having meals together. But 19% say they or others at home are eating things now that they previously wouldn't have

36%

Spend longer cooking meals than usual, with comfort foods particularly popular. Because of this, Waitrose.com has seen 'comfort food' recipes up 44%

26% of us say we've been cooking more unusual meals - trying different cuisines or ingredients. Top searches on Waitrose.com include:

JAPANESE FOOD	53% ▲
Including sushi rice 121% miso 114%, teriyaki 175%	

THAI FOOD	83% ▲
Including curry paste 161% coconut milk 137%	

CHINESE FOOD	125% ▲
Including five spice 127% plum sauce 119%	

INDIAN FOOD	144% ▲
Including Keralan food 115% garam masala 73%	



DRINKING

46%[▲]
INCREASE IN SEARCHES
ON WAITROSE.COM FOR
NON ALCOHOLIC GIN



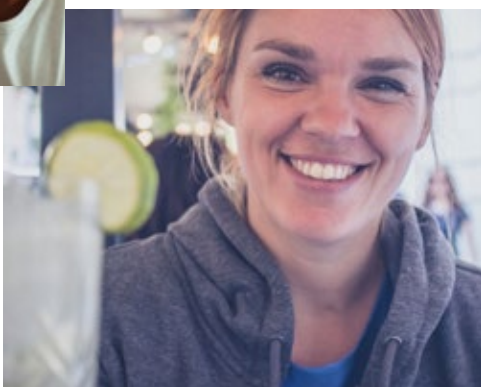
"We've all had to get used to a new way of living, cooking and eating during lockdown. Whether working harder to use up ingredients in store cupboards in a creative way, or taking the time to try cooking a new cuisine, it's been great to see lots of people losing their fear of failing and trying new recipes that they might normally give a wide berth. And with our favourite restaurants closed there has been an increase in people recreating a restaurant experience at home."

MARTYN LEE

Executive Chef at Waitrose



Coffee and tea sales went up six-fold at Waitrose in the first few weeks of lockdown, especially whole bean coffee - as people looked to recreate a café experience at home.



“The unseasonably warm weather pushed up demand for rosé wine, with many people choosing a glass of something pink to relax with in the sunshine. We've also seen strong demand for versatile, food-friendly wines, as people looked to recreate a restaurant experience at home.”

BECKY HULL MW

Wine Buyer at Waitrose



27%

OF US HAVE TAKEN PART IN VIRTUAL SOCIAL GROUP ACTIVITIES, INCLUDING:

PUB QUIZ	37%
COCKTAIL OR DRINKS PARTY	20%
EATING DINNER OR FOOD WITH FRIENDS	20%
HAVING A 'VIRTUAL DATE'	9%

The most popular spirits at Waitrose have included tequila, gin, and golden and dark rums. Four of the UK's top 10 cocktails are rum-based, and we've seen people recreating these at home.

20% of people connecting with others over social media say they've chosen to do this with a cocktail or drinks party.

“With our favourite pubs and bars sadly being shut we have seen the rise of the 'have-a-go' bartender at home. People are shopping for more unusual ingredients such as Tequila and Triple Sec in order to make that perfect drink for staying 'in in'.”

JOHN VINE

Spirits Buyer at Waitrose



78%

INCREASE IN SALES OF LIQUEURS FOR COCKTAILS

Q Searches on Waitrose.com

Wine	486%▲
Beer	269%▲
Gin	144%▲
Tonic water	254%▲
Non alcoholic beer	47%▲
non alcoholic gin	46%▲

Of those who drink alcohol, 25% are drinking more since lockdown and 21% are drinking less.

17% of people have been choosing to spend our increased time with loved ones trying out new drinks at home.

Liqueurs for cocktails have seen a 78% increase at Waitrose, and cocktail ingredients up 46% (e.g. triple sec).

CREATING A BAR EXPERIENCE AT HOME

Martyn Lee - Executive Chef at Waitrose

Make your own simple syrup

It's so easy and works to sweeten all kinds of cocktails. Dissolve a ratio of 2:1 sugar and hot water. and then flavour with rose petals or orange blossom water if you like. You could then dip slices of citrus fruit into the syrup and dry out in a low oven overnight to make dried fruit garnishes.

Shaken not stirred

I love using a splash of olive brine and rosemary in a dry gin like Gin Mare - it works really well with vodka too giving it more of a dirty martini flavour.

Garnish

Like you're in a fancy bar: crushed cardamom pods and star anise pair well with fruitier gins.

LOCK DOWN

WEEK 1

15th - 21st March

Fastest growing sales at Waitrose include toilet roll, baked beans, basmati rice and tins of chicken soup. Pasta sales are treble the usual rate (returning to normal by week five)

Spirits sales at Waitrose are up 65%

John Lewis sees a surge in sales for freezers, laptops and landlines as the nation prepares itself for lockdown

Waitrose launches dedicated shopping hour for vulnerable customers, temporary closure of cafés, and a cap on grocery items



WEEK 2

22nd - 28th March

The UK Government enforces freedom of movement restrictions

John Lewis stores close for the first time in its history and traffic lifts on JohnLewis.com

Waitrose introduces social distancing in its shops. Basket sizes double while total customer numbers and shopping frequency fall to lower than the same period in 2019

Waitrose sets aside hard-to-find products for NHS workers, and gives them priority service in its shops

Waitrose sees strong sales of antibacterial wipes and paracetamol

Following Government closure of schools, sales of puzzles, crafting kits, LEGO and swing ball sets soar at John Lewis

The first Clap for our Carers takes place - and every Thursday since

When shopping for essential items, nearly half of Waitrose shoppers say they're visiting supermarkets at times when they think they'll be quieter as a direct result of CV-19

Proportion of people looking for online shopping slots is rising significantly



WEEK 3

29th March - 4th April

People are spending more time in the kitchen and demand for pasta machines, bakeware and food processors spike at John Lewis

At Waitrose, wine moves to the top of many shoppers' lists

By this point, more than a quarter of Waitrose.com customers have not used the service in at least the last year

Availability levels are improving in supermarkets and mass capping of three grocery items (introduced in week one) is removed

The volume of visits to JohnLewis.com are now spread throughout the day between 8am and 8pm

Slight dip in traffic 5pm - 6pm as the nation tunes in for the Government update

WEEK 4

5th - 11th April

The Queen addresses the nation for the fifth time in her 68 year reign

At Waitrose, sales of burgers and salad rise as the temperature soars, and Easter weekend treats including legs of lamb and smoked salmon

The warm weather also drives high demand for outdoor furniture and gardening tools including pressure washers as Brits utilise their outdoor spaces while social distancing

Sales of stamps are double their usual rate (and throughout lockdown), as people send a letter instead of seeing loved ones

Waitrose launches a volunteer's shopping e-gift card, to help those shopping for vulnerable or self-isolating customers

Searches for toys and books on JohnLewis.com spike at 8:30pm as parents look for ways to keep children entertained at home



WEEK 5

12th - 19th April

Customers are spending more time on their beauty regimes during lockdown and skincare sales are up 183% while face masks and hair treatments are up 187%

With hair-salons and barbers closed across the country, customers take matters into their own hands and John Lewis reports male grooming products are up four-fold while hair removal technology is up nearly eight times and hair dye at Waitrose is up 149%

Full, trolley shops are up 56% at Waitrose compared to the same week last year. Single, meal-focused shops are down over 70% on last year

Sales of spirits continue to be popular at Waitrose as people create a virtual 'bar' experience at home while socialising with friends over social media

JohnLewis.com sees customers putting more items in their shopping baskets per shop to streamline deliveries during lockdown



WEEK 6

20th - 27th April

The John Lewis Partnership announces plans to reopen its Lancashire textiles factory, Herbert Parkinson, to make 8,000 protective gowns for the NHS

Fresh food and weekly staples lead the way at Waitrose as shoppers get into a regular routine

Parents-to-be continue to stock up on essentials for new arrivals, coinciding with the imminent arrival of a baby at Number 10. John Lewis sees strong demand for muslins, cots, baby gros and changing mats

Waitrose sees sales of sushi on the rise as people look for a change from their own homemade lunches

The average weight of a Waitrose.com order is now 30% higher than usual, and includes 49% more items



TIMELINE



RESTAURANT EXPERIENCE AT HOME

Looking ahead, with many of us eating all three meals at home most days, people want ways to get variation into their cooking. Particularly at the moment we all need a Saturday night dinner to feel different to a weekday meal. Because of this, our chefs and product developers are making sure that our food innovation really responds to the significant shifts in customer behaviour

NATALIE MITCHELL

Waitrose Head of Innovation and Product Development



PEOPLE AND COMMUNITIES GOING ABOVE AND BEYOND

We have seen people across the UK going above and beyond to support their local communities during these turbulent times. Millions of pounds have been raised by individuals to support those on the front line and we expect to see these incredible fundraising campaigns continue. We are hugely proud of all the work, time and effort our Partners have been and continue to commit to support the NHS, local charities and the vulnerable during this time

CAROLINE SILKE

Social Impact Manager, John Lewis Partnership

GET FIT, STAY WELL

They say it takes three weeks to form a new habit - and lockdown has given many people time to do just that. The crisis has reinforced the importance of getting fit and staying well. And, for many people, increased time to prepare home cooked meals, do more exercise or plan the weekly shop has meant a much higher chance of new habits staying for good

DR JOANNE LUNN

Waitrose Health Manager

A SHARED SENSE OF RESPONSIBILITY

Community will play an even greater role in the future, and we'll begin to see more of a shared responsibility for many of the most close-to-home aspects of our lives. Whether through sharing educational responsibilities, digital spaces or pet ownership, the increased connectivity will bring a financial benefit, a time benefit, and an emotional one

JOHN VARY

Futurologist, John Lewis Partnership

LIFE AS LOCKDOWN EASES

SUPPORTING BRITISH PRODUCERS

More than ever, shoppers want to support British farmers - and we certainly see this enduring. We are of course sticking by our British sourcing commitments, and there are some more subtle ways in which the British farming industry needs support. For example, with increased demand for mince for batch cooking, many other cuts of beef were in danger of being forgotten about - so we've started our biggest ever promotional drive across the rest of our beef range to ensure other cuts don't end up going to waste

JAKE PICKERING

Waitrose Agriculture Manager

A MOVE TO ONLINE

Whether through necessity, convenience, or as people generally seek minimal-contact ways to live, we know out of lockdown there will be an increased demand for grocery shopping online. We've been working to increase the orders we can deliver - including a new Fulfilment Centre in Enfield (opening today, 7 May), that will double deliveries in London. Planned as part of our work to meet extra demand when our contract with Ocado ends in October, the timing of Enfield has helped us respond as best we can to the huge demand for online slots - especially from our most vulnerable customers

BEN STIMSON

Waitrose.com Director

MAKING EXPERIENCES VIRTUAL

During lockdown, we launched free digital nursery, home and styling services online in response to the evolving needs of our customers and to provide much needed inspiration, guidance and support during isolation. In just three weeks, over 1,000 appointments took place and we look forward to expanding these to include services such as wine tasting, yoga lessons and cooking classes

PETER CROSS

Director of Customer Experience John Lewis Partnership



WHAT WE'RE WEARING

The needs of the nation's wardrobes have changed. We understand that comfort has been a key priority for our customers at this time. Casualwear, athleisure and nightwear have all seen high demand and we expect to see these areas continue to grow in popularity as we spend more time at home

JO BENNETT

Head of Buying, Womenswear John Lewis Partnership

