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# Clear Conversations: The Next Consumer Change – Will You Be Ready?

A report from Clear M&C Saatchi and tml Partners from their panel discussion with marketing leaders in the consumer sector



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## Introduction

Building on a successful partnership of co-hosting events (you can see a summary of our last consumer-focused panel [here](#)), Clear M&C Saatchi and tml Partners brought together leaders in the consumer sector to discuss the next evolution of consumer behaviour and what it means for brands.

Moderated by Geraint Jones, Global Marketing Director at Clear M&C Saatchi and Growth Operations Director for M&C Saatchi Group plc, the discussion featured the following speakers:

**Yelena Idelchik**, Category Management and Shopper Insights Director of Hygiene US at Reckitt

**Michael Benson**, Marketing Director at Church & Dwight

**Megan Frackoviak**, Director of Category Management at Sovos Brands

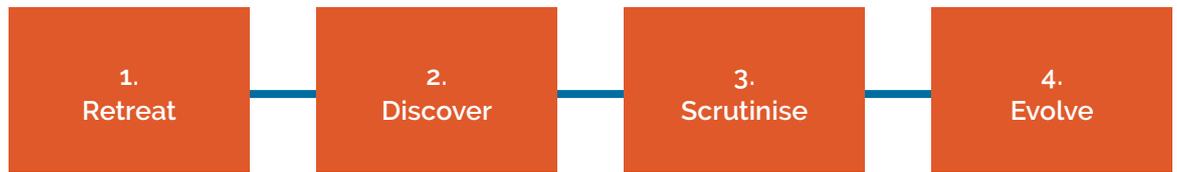
**Emma Calder**, Senior Consultant at tml Partners

**Stephen Lang**, Strategy Director at Clear M&C Saatchi

Geraint laid out the background to the session: 'What's happening with consumer behaviour?' is one of the biggest questions that the team at Clear M&C Saatchi have been hearing, and as a growth consultancy, the challenge is finding out how clients can stay ahead of that next consumer change and find a competitive advantage in an ever-changing marketplace.

# The four stages of consumer behaviour

To help us dig into that question, Stephen pointed out that while we can't predict the future of the consumer sector, we can look at the past and learn from it. With that in mind, he ran through the four stages that consumers have gone through since the start of the pandemic:



## 1. Retreat

We saw a mass retreat to the home in March 2020 – shelves were stripped, pantries were stocked and toilet paper sat at the center of a global shopping frenzy. The fear, uncertainty and panic that characterised this time drove consumers' need for comfort and security. This led to familiar favourites like Campbell's Soup and SPAM being rediscovered: as well as meeting a functional need for being shelf-stable, they filled the emotional need that consumers were looking for.

**The lesson: remember how your audience perceives your brand and what functional and emotional needs you can deliver against. This clarity can help you leverage your strengths and capitalise on future consumer behavioural shifts.**

## 2. Discover

The next stage was a significant period of experimentation, trial and discovery. Opportunities were created for smaller brands – partly due to stock issues, boredom and the continued acceleration of ecommerce. Consumers decided to make the best of their situations and adopted new behaviours (and brands).

**The lesson: recognise and adapt quickly to meet the changing consumer context by addressing emerging needs, transformed occasions and captive audiences.**

## 3. Scrutinise

This is an acceleration of a pre-existing consumer trend: the increasing expectation that brands should play a positive role in society, and the increasing scrutiny of a brand's actions outside of creating products and profit. As Unilever's Chief Digital and Marketing Officer, Conny Bramms, put it: 'People will be living and looking in recession times for brands for their value but also for their values. It's this dual nature of value that has become more prominent'.

**The lesson: know what you stand for and what actions you're prepared to take in line with that. Don't be afraid to use your voice when it counts.**

## 4. Evolve

As we get back outside the home, it's clear that only some of these new behaviours will stick: the useful behaviours that consumers feel motivated to continue with. It's crucial to figure out what trade-offs are being made and evolve as a brand.

**The lesson: stay ahead by innovating the brand experience – add value, be useful and look to meet consumers where they're going next (e.g., through new products, services or use cases for your brand that have developed).**

Clear M&C Saatchi launched [a study](#) earlier this year looking at forces of chaos and their impact on marketers, and Stephen flagged some forces of chaos to consider when it comes to consumer behaviour:

- Burgeoning wealth divide in society
- New world of work
- Lingering restrictions
- Continued supply chain disruption
- Further acceleration of ecommerce

# Q&A

## On whether staying ahead of behavioural change is possible

Yelena's opinion on this was split between 'yes' and 'no': without a crystal ball, there are so many variables that can make the world and our behaviour pivot. However, we can anticipate what could happen through ideating the most likely outcomes and preparing 'what if' scenarios based on what we do know about shopper reactions. At Reckitt, due to the unpredictability of the situation, there's been greater communication, listening and openness from and with retail partners. There are hints along the way indicating which hypothetical scenario is playing out, and the exercise of scenario-planning places you more in control rather than being in a purely reactive position.



'Seeing how our products fit into consumers' lives slightly differently than they did before has been key to planning ahead.'

Michael

## On the forward-looking and backward-looking tools for understanding consumer behaviour

Michael shared that he relies on traditional panel data for the hard metrics showing lockdown's impact. The team at Church & Dwight has also been conducting qualitative research – including a lot of social listening – to understand how consumers are using their different categories.



'Having a consumer awareness and a good idea of what they're thinking in the now has been a guiding principle over anything else.'

Megan

Michael and Megan pointed out that academic research was vital to getting a handle on what was going on at the outset of the pandemic; looking at recovery curves from past health crises provided a much-needed sense of direction until consumers got a better feel for what was happening around them. After this, consumer insights and surveys were a lifeline.



'While many CPGs froze or cancelled their investment in research early on in the pandemic, Reckitt looked at research as an opportunity to invest in the future; rather than stopping research, we shifted it to see what new questions they needed to ask. This became a differentiating factor that helped us stand out further down the line.'

Yelena

For Yelena, vendor partners have also become a natural extension of Reckitt's teams and a way of attempting to predict the future in a pragmatic fashion. Partners provide unique perspectives, approaches and value-adds, and have become go-to research destinations for her team.

Finally, Geraint shared a fascinating anecdote from a fellow marketer who was keeping an eye on the housing market. By looking at the number of people upsizing houses and adding rooms, they could get a sense of how frequently people may or may not be commuting in the future. These different sources of data from third parties are giving marketers ways to enrich the story they have about consumers and helping them to get ahead of the next consumer change in increasingly creative ways.

### On retail partners

For Megan and her team at Sovos Brands, the focus has been on brick-and-mortar. Retailer relationships have been evolving dramatically, and the team felt a responsibility to be there for retail partners as well as consumers throughout the crisis. The team and their retail partners have been discussing key questions as a partnership forum to involve each other in ongoing strategy. Megan noted that being able to pivot as fast as consumers' feelings and emotions are pivoting has been key to working with retail partners and adapting to suit both their needs and fast-moving market conditions.

### On brand partners

Yelena's filter for this is to make sure that any solutions and partnerships are feasible, ownable and sustainable: do they fit with Reckitt's equity at both the brand and corporate level? How long can they last and grow, both as partnerships and the future marketplace evolve?

Michael's take on cross-category partnerships was that they can be a great means to stay relevant and access new growth, but it depends on your brand. In the haircare space, Church & Dwight has been looking at leveraging opinion leaders to advocate for different ways of using their products. In this way, partnerships can be an extremely effective solution.

“Having ambassadors to build trust helps reach consumers who are finding their way in this new world and thinking about how to look after themselves in a new way.”

Michael

### On taking a strategic step back to assess what's next

From Michael's perspective, as consuming and confusing as the short-term has been, his team's never taken their eyes off the long-

term when they're planning and reporting. Ultimately, many category growth driver fundamentals haven't changed, but they've had to make adjustments with channels and channel partners. The right messaging has been key to meet consumers where they're at and communicate that Church & Dwight is there to support their new priorities.

On the recruitment side, Emma pointed out that there's been an increase in customer experience and performance marketing roles, as well as opportunities for behaviour analysts who can do deep dives into customer segmentation data and analyse purchase behaviour. When it comes to engaging with consumers, she's also seen an increased demand for client relationship managers and content specialists. There's a real need for tactical, targeted communications and the market is reflecting this. Strategic leaders who can focus on mid- to long-term innovation are also in demand.

“At the moment, there's the added luxury of time for companies to think about how to future-proof their businesses. Innovation is now showing up in job descriptions relating to sustainability, customer experience, direct distribution, AI and digitalisation.”

Emma

### On choosing where to focus

Geraint pointed out that many marketers are juggling too many demands on their time and are trying to be choiceful about where they spend everything from their time to their recruitment dollars. Megan agreed that 'choiceful' is the keyword: in terms of where to invest, everything must have a very specific purpose but still fall within the 'what if' scenarios discussed earlier. As she put it, 'it's almost like a new exponential level on top of strategic planning that we have to pay attention to now'. She used a great example to illustrate this: returning to restaurants, which can look extremely different in terms of approach and impact depending on geography, location, economic diversity, level of comfort, etc.

Yelena noted the importance of having a compass and a corporate purpose. For Reckitt, this became to protect, heal and nurture in the relentless pursuit of a cleaner, healthier world. Their programs and initiatives ladder up to that long-term goal – they want to provide consumers with the best products they can buy to live better lives, but this also must be rooted in something meaningful. As she put it, working towards what really matters 'while bringing retail partners along on the journey since purpose-driven initiatives are also very important to them becomes a win-win situation long-term'.

Speaking of having a compass, Megan shared a simple test that she uses to assess where to focus: in her words, 'if it doesn't drive mental awareness, physical awareness or household penetration, then everything needs to stop, and we need to realign'.

Starter questions to help you choose where to focus

Steve weighed in with a number of considerations to help assess where you're at and determine where to focus:

- What are you trying to achieve as a brand?
- What do you stand for as a brand?
- What trends do you need to focus on? What could you leave to the side for now?
- What are the big forces coming up that could positively or negatively impact your business?
- What's the size of each potential impact on your business?
- What's your ability to influence and control each factor/force/trend?
- What do your consumers and partners want from you?

He flagged that building a balanced strategy needs to take all of this into account and map out quick wins as well as long-term transformational bets.

## Conclusion

It's apparent that rather than conceiving of a 'new normal', we should be thinking about how we stay ahead, adapt quickly and navigate constant change in order to drive growth. Intelligent innovation is key, and brands should be thinking about the following in relation to this:

### Back to basics:

Know how you're useful: explore new ways to deliver that utility as consumer needs and behaviours change.

Demonstrate value through the experience: connect the what and the why.

Look outside the comfort zone: assess the potential of new out-of-home occasions and partnerships that perhaps weren't there before.

### Looking ahead:

Look ahead of the curve: map and prioritise forces of chaos and invest in disruption early.

Adapt and flow with the data: have a living, evolving view of your brand and consumer.

Get out in front where and when it counts: map future consumer journeys and identify short and long-term opportunities to add value.

# About Clear M&C Saatchi

Clear is an award-winning global growth consultancy specialising in business, brand, experience and innovation. We use clarity to cut through complexity and generate growth for some of the world's leading brands. We're part of the M&C Saatchi Group, the world's leading independent marketing services group.



**Stephen Lang**

**Strategy Director**

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Stephen's a strategist with particular expertise in brand and growth strategy – helping clients realise the potential of their brand by bringing it to life, inside and outside of the organisation.

In his time at Clear M&C Saatchi, he's led multinational engagements for a range of B2B and B2C clients including Invesco, John Lewis, Nestlé and Colgate-Palmolive. Before joining Clear, Stephen spent six years at brand consultancy The Clearing where he developed positioning, architecture and engagement strategies for clients including Fitness First, Ocado, Eurostar and McLaren.



# About tml Partners

With a team of highly experienced consultants, we provide specialist marketing expertise that is unrivalled by generalist headhunters and in-house resourcing teams. We network extensively in this community continually adding value with thought provoking events and publications to help facilitate the agenda for the marketing leaders of tomorrow.

Finding the right marketing talent is far from obvious and ineffective hiring is high risk. tml Partners mitigate this risk with a truly dynamic perspective on hiring the best marketing talent. We're trusted and connected networkers in the senior marketing community and spend a lot of time understanding the motivations and building meaningful relationships with the best, hard to find, passive talent.



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Emma specialises in senior marketing appointments for leading brands across FMCG, Food and Beverage, Consumer, Retail and eCommerce.

Emma has extensive experience recruiting in these sectors working with blue chips through to smaller startups. She recruits across all marketing disciplines - brand management, marketing communications, insights, innovation and trade/ shopper/customer channels, as well as digital and eCommerce.