COVID-19 Consumer Impact Report
w/c 09.11.20

RADAR

the FUTURE of BRITAIN YOUR VOICE

Contents

Introduction & Summary

Introduction

The OMD Insight team's unique tracking study, Radar, surveys between 250 - 500 Brits weekly to glean insight on the nation's outlook and consumer's decision-making. It has run for 84 weeks, surveyed over 25,000 people in total and given OMD UK access to a rich, trendable dataset of consumer behaviours.

With the COVID-19 pandemic impacting everybody in the UK, we are using Radar to measure the extent of this impact and track how it evolves over time.

This week's report focuses on these most recent results, collected from a nationally representative sample of c.250 respondents in the UK between Friday 6th November to Sunday 8th November 2020.

Summary: On the first weekend of Lockdown 2.0, happiness and anxiety levels have stabilised as people look ahead to Christmas

01 After a significant drop last week (ahead of the news of a second lockdown), happiness levels increased this week from 31% to 34% and life satisfaction has increased 2ppts to 27%. Correspondingly, anxiety has dropped to levels seen in previous weeks. Optimism, however, has decreased 2ppts from 20% to 18%.

02 In comparison to the first week of Lockdown 1, sentiment in the first week of Lockdown 2 is marginally more positive, as people are less anxious and slightly happier. However, levels of optimism are lower, and people feel significantly less financially secure.

03 There has been a 4ppt decrease in the percentage of people feeling financially secure this week, now at 36%. The percentage of people reporting that money is tight has increased 7ppts, now at 56%.

04 Concerns over job security and financial savings have increased this week, with 15% reporting having someone in their household on furlough.

05 Despite the introduction of Lockdown 2, the nation is looking forward to Christmas and gradually feeling more festive but levels of concern over Christmas remain prominent (5.8/10)

06 Lockdown 2 has not yet impacted expectations for Christmas, with expectations of less time with friends, less travelling, more time with family and more shopping done online prevalent across recent weeks – the nation had factored in the need to adapt at Christmas prior to the latest lockdown

As Lockdown 2.0 gets underway, there is a sense of resilience amongst people and Christmas takes top of mind

"My main concern about this lockdown is that it won't end at the start of December as it is meant to and we will still be in this lockdown well into the New Year. It would be very hard to not see our wider family for dinner on Christmas, especially as they only live up the road, and so we would have to get creative to make sure that a continued lockdown doesn't impact on our Christmas too much"
Female, 25-34

"Loneliness is a big issue, but I will try stay positive and focus on activities that will calm me and make sure I talk on the phone to people every day"
Female, 45-54

"We were not shocked when we heard the news and to be honest our family our just going to get on with things and hope that it will be just the month we are in lock down and not longer. I think my family and I are better prepared and we will be fine, just going to keep busy and make sure my family are safe" **Male, 35-44**

"Its not as strict as lockdown 1.0 as you can do things now that simply were not possible to do in March / April. As the nitty gritty of what it actually entails became clear not much will have to change in the day-to-day life of my family. Not only do we feel we are less affected this lockdown, but Supermarkets have become used to the changes and have adapted better this time round."
Male, 45-54

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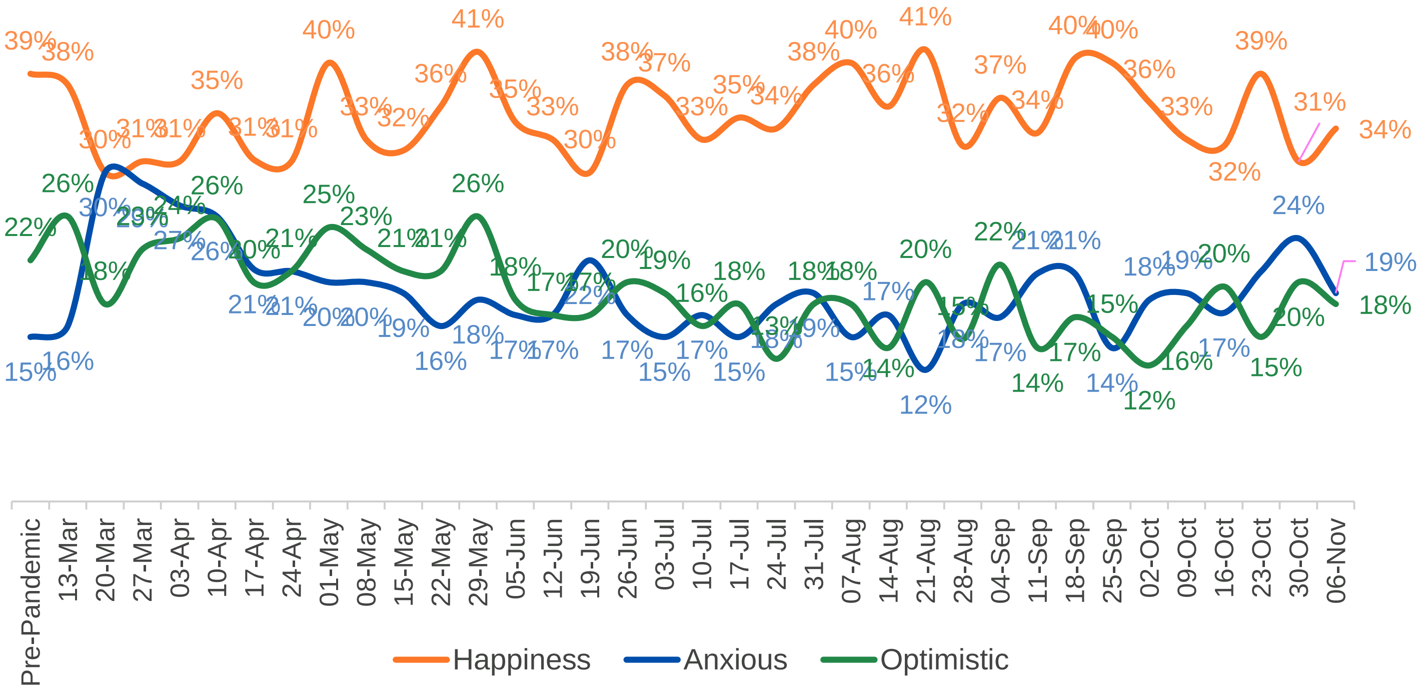
Life satisfaction, optimism & consumer confidence

Pre-lockdown 2, happiness levels were down whilst anxiety was high. As lockdown begins however, happiness has increased, and anxiety levels have dropped

- After a significant drop last week, happiness levels increased this week 3ppts from 31% to 34%
- Optimism has decreased 2ppts from 20% to 18%
- Life satisfaction has increased this week by 2ppts, now at 27%
- Anxiety levels have seen 5ppt decrease this week, from 24% to 19%

Overall, how Happy/ Anxious/ Optimistic did you feel yesterday?
(0=Not at all, 10=Completely)
% selecting top 3 (8-10)



Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500. 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 28/08:250, 04/09:250, 11/09:250, 18/09:250, 25/09:250, 02/10:250, 09/10:250, 16/10:250, 23/10: 254, 30/10: 250, 06/11:250

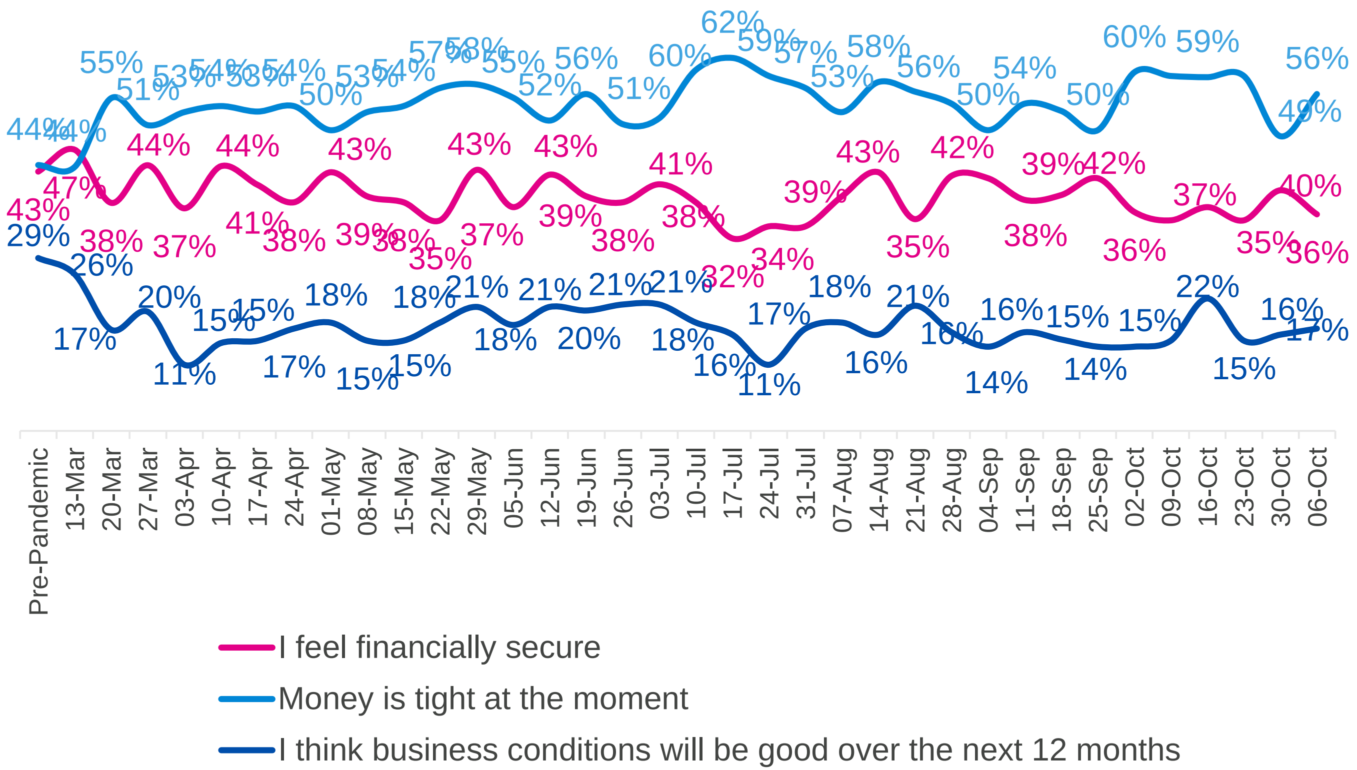
Feelings of financial stability have decreased this week, with more reporting that money is tight and less people feeling financially secure

There has been a 4ppt decrease in the percentage of people feeling financially secure this week, now at 36%

The percentage of people reporting that money is tight has increased 7ppts, now at 56%

Confidence in future business conditions has increased marginally by 1ppt to 17%

To what extent do you agree with the following statements?
(0=Not at all, 10=Completely)
% selecting top 3 (8-10)



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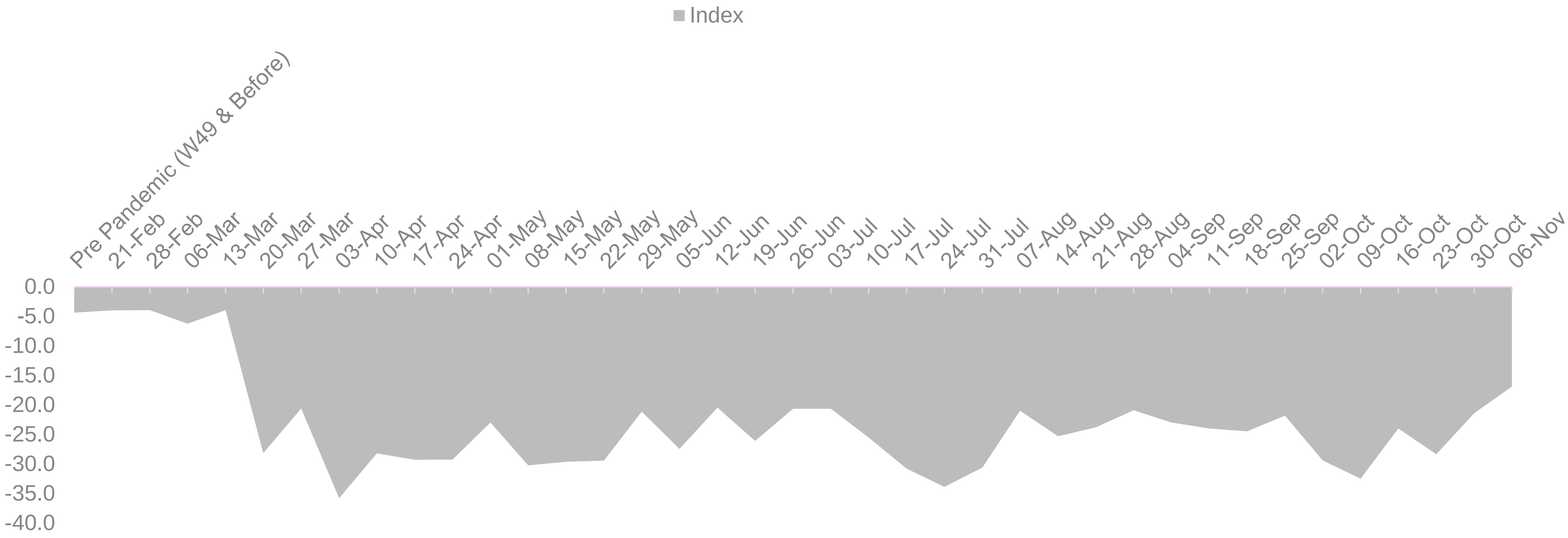
Consumer Confidence has decreased this week, remaining far below pre-pandemic levels



The Consumer Confidence index can range from 100 to -100 and is calculated by subtracting negative financial outlook from positive financial outlook. A zero score means equal positive and negative feedback. Please note that we have remove two statements that were originally included in Index calculations to get a more nuanced view, and therefore the data now shown in this chart is different to previous weeks.

Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500. 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 28/08:250, 04/09:250, 11/09:250, 18/09:250, 25/09:250, 02/10:250, 09/10:250, 16/10:250, 23/10: 254, 30/10: 250, 06/11:250

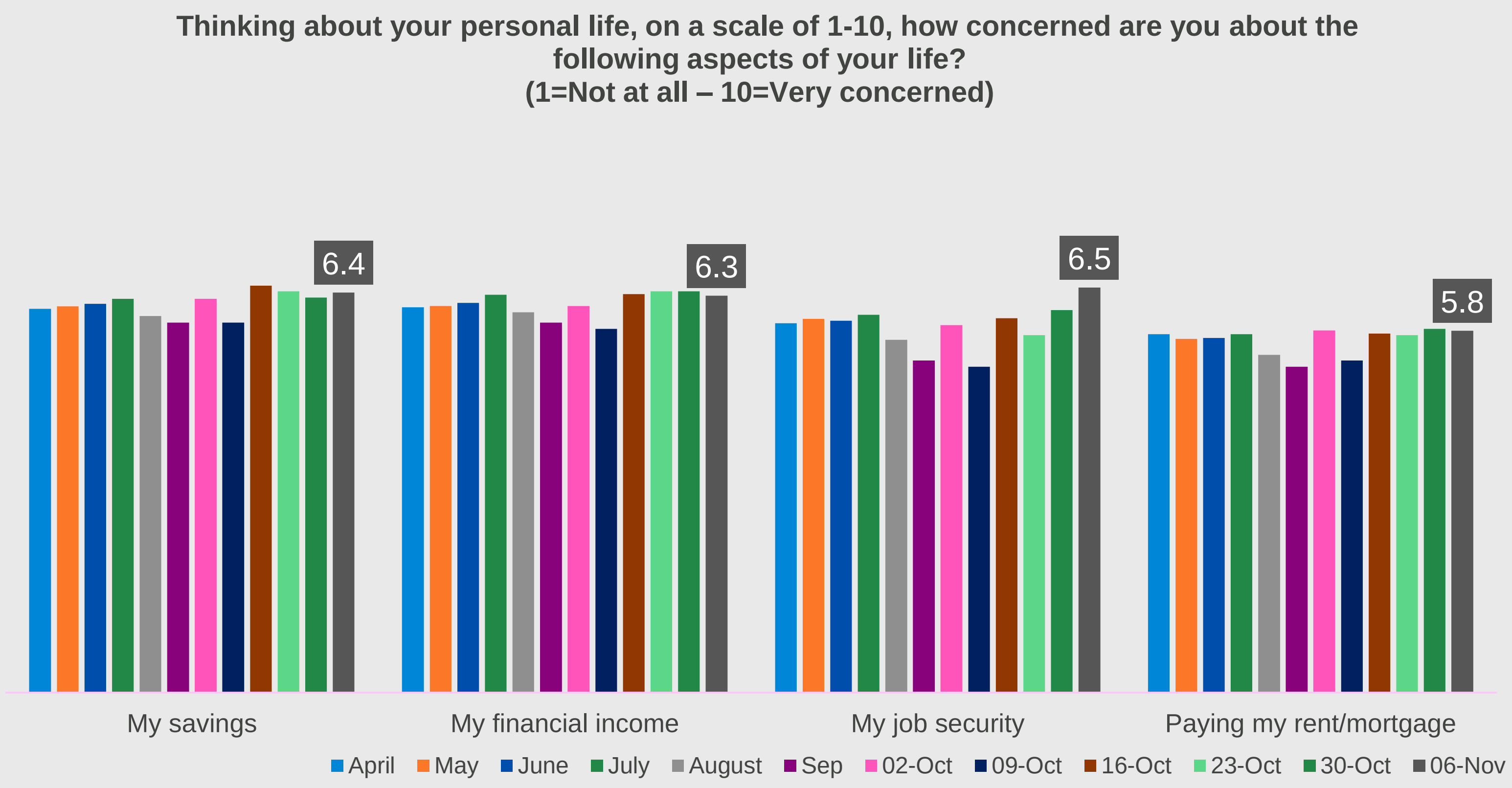
Concerns over job security and financial savings have both increased this week, with 15% having someone in their household furloughed

15% of households have someone that has been **furloughed**

5% of households contain someone that has had their **salary reduced** since the COVID-19 outbreak

6% of households include someone that has **been made redundant** since the COVID-19 outbreak began

62% say that their employer has been supportive during the COVID-19 outbreak



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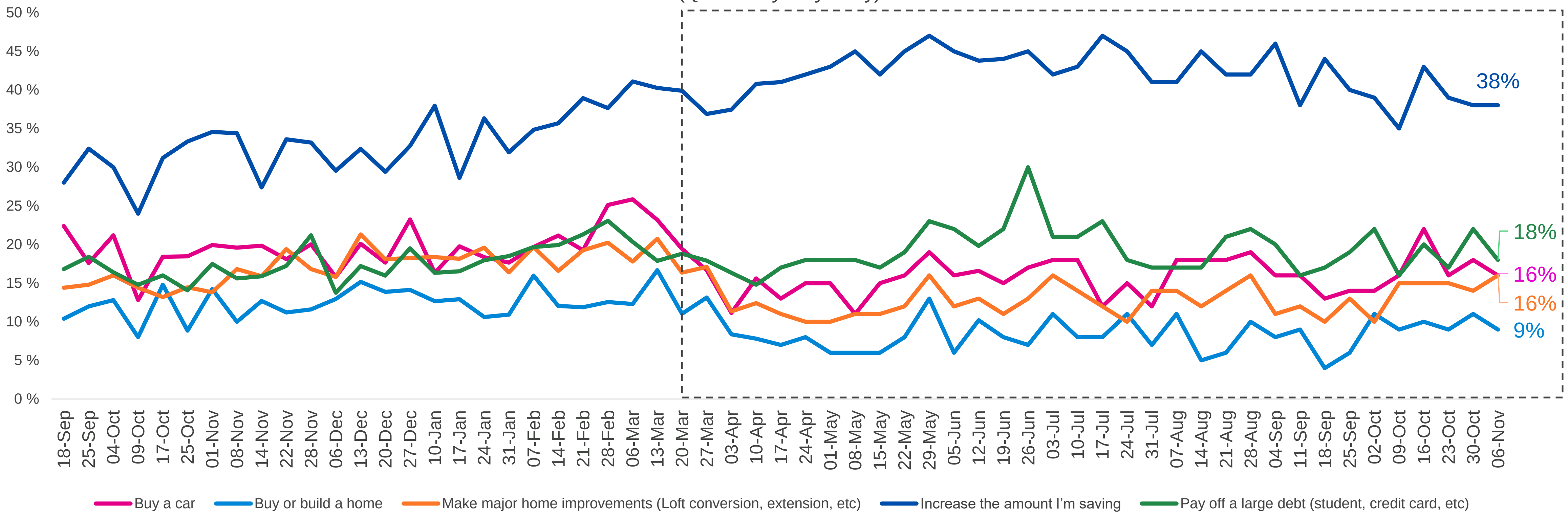
Plans to buy a car or buy/build a home have decreased this week, however, plans to make major home improvements is up 2ppts

Those intending to increase the amount they are saving in the next 6 months remains at 38% this week

How likely are you to do the following in the next 6 months?
(Quite likely/very likely)



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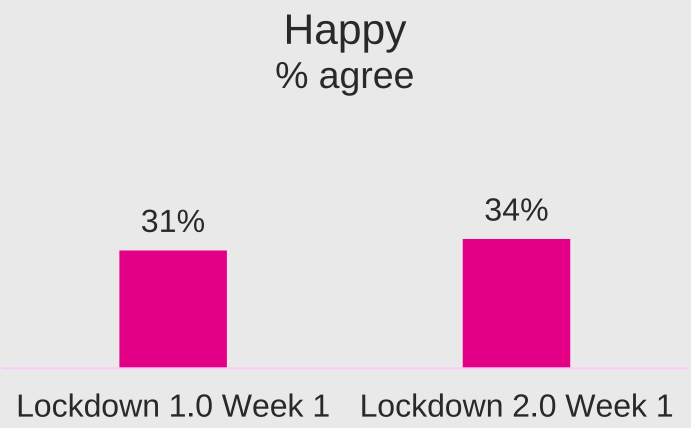
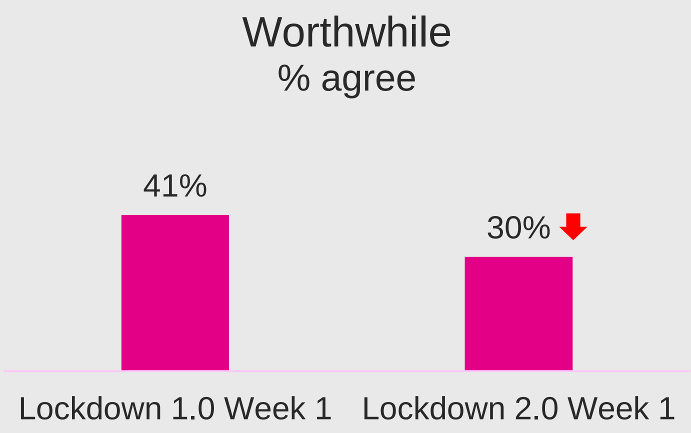
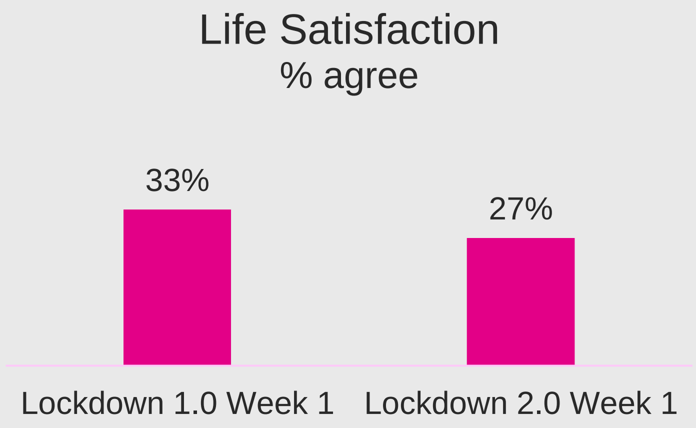
In comparison to the first week of Lockdown 1, sentiment is marginally more positive, as people are less anxious and slightly happier, but outlook on the future is down

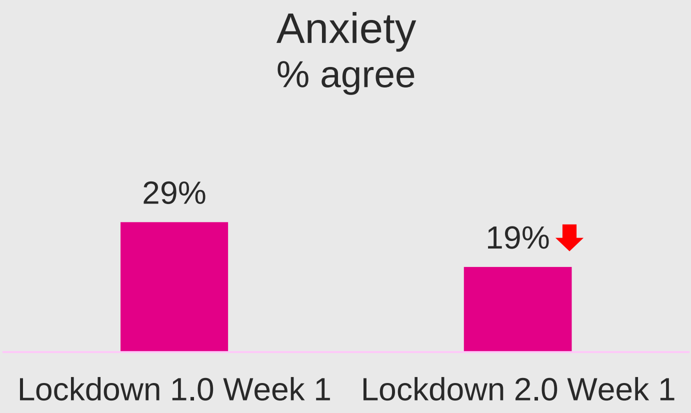
Lockdown 1 began on the 23rd of March, we surveyed people 5 days later, on the 27th of March. Lockdown 2 came into force on the 5th of November, and we surveyed people on the 6th, 1 day into the second lockdown. Going forward, Radar will be able to get a weekly read on how behaviours are changing in the second lockdown vs the first lockdown.

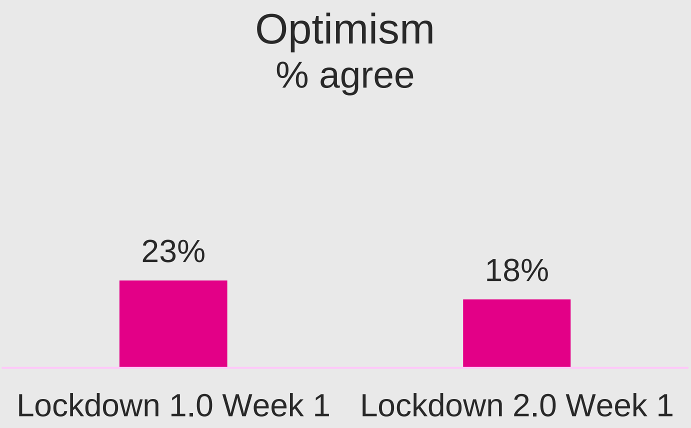
Shows significant difference at 95%











Source: OMD Radar Survey, 27/3: 480 and 06/11: 250.

In comparison to the first week of Lockdown 1, people feel significantly less financially secure at the start of Lockdown 2

Lockdown 1 began on the 23rd of March, we surveyed people 5 days later, on the 27th of March. Lockdown 2 came into force on the 5th of November, and we surveyed people on the 6th, 1 day into the second lockdown. Going forward, Radar will be able to get a weekly read on how behaviours are changing in the second lockdown vs the first lockdown.

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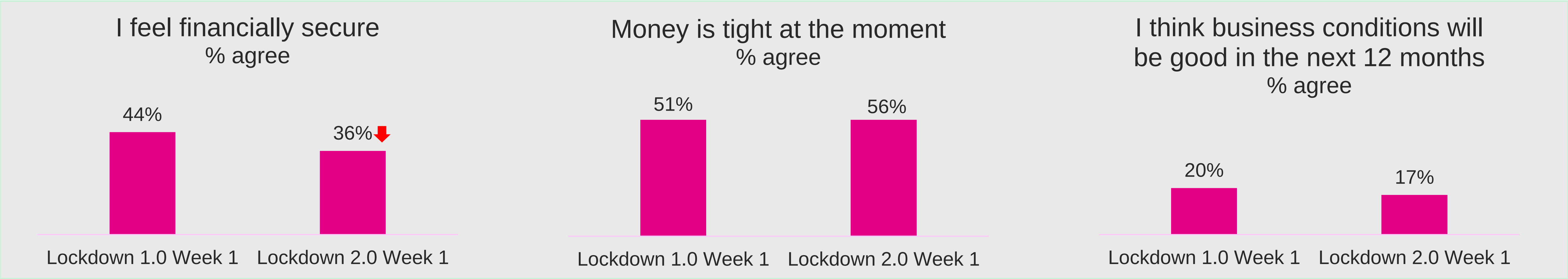


Source: OMD Radar Survey, 27/3: 480 and 06/11: 250.

Confidence in Government & Broad Concerns

Confidence in the Government's response to Covid-19 remains low, with just 27% reporting feeling confident in their response

Many feel the Government are more concerned about the economy than public health:

"Their response so far has been chaotic and incompetent. They are more concerned with giving big contracts to companies they (ministers) have connections with rather than who is the most suitable to have them (e.g. Serco and Test & Trace, a contract for delivering PPE to Pestfix, a pest control company)"

"The government seems more concerned with the economy/rich people than the health of the country"

"They keep getting everything wrong and care more about the economy than people's health"

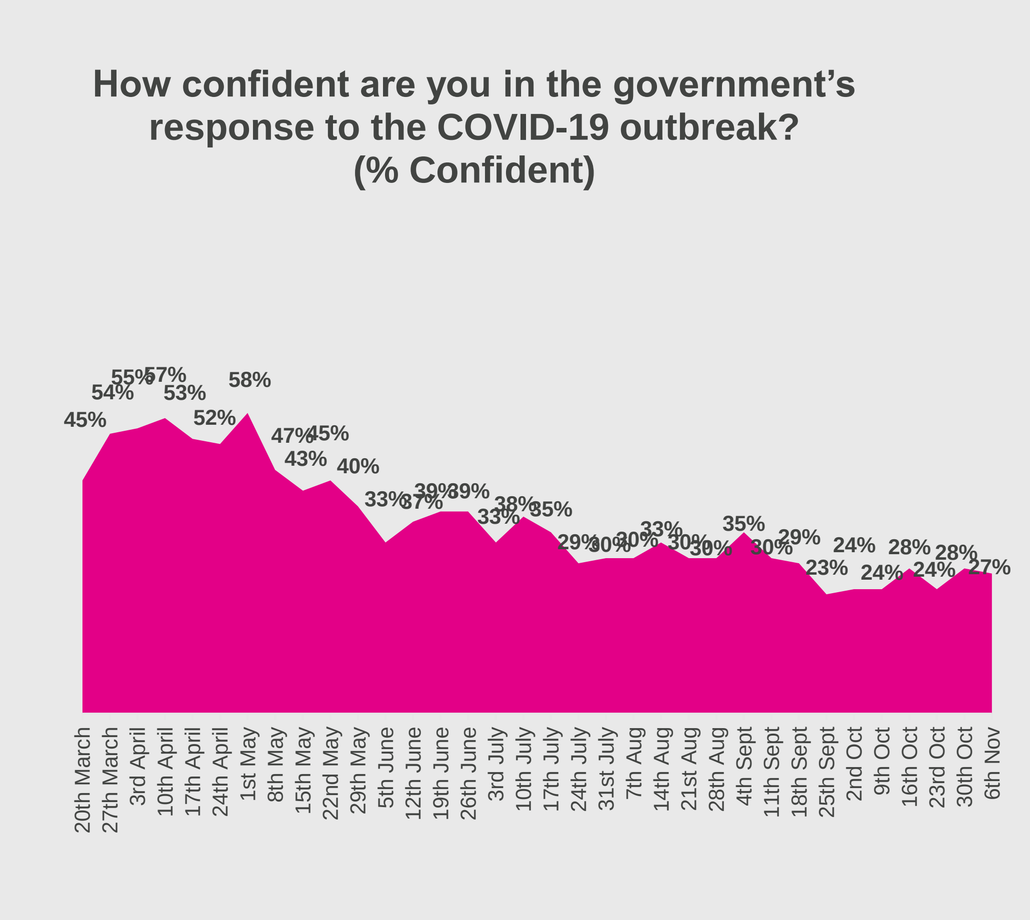
"They are more concerned about business than health and have approached everything the wrong way and too late."

Others question the second lockdown and the information that the government are basing decisions on:

"Because I don't think we need to have a lockdown, it will just make things worse and all we really need to do is learn how to live with Covid and focus on keeping death rates low instead of the number of cases"

"There are so many different rules, even the government get confused. The data is never right , the track and trace app seems to give false reports and the amount of deaths have been recorded as Covid related when it had nothing to do with Covid.   The country is in a right mess at the moment and I can not see a way out of it."

"I think Covid 19 is not going anywhere soon so we need to get on with our new normal lives. Keep the masks, social distancing etc but get back to normal"



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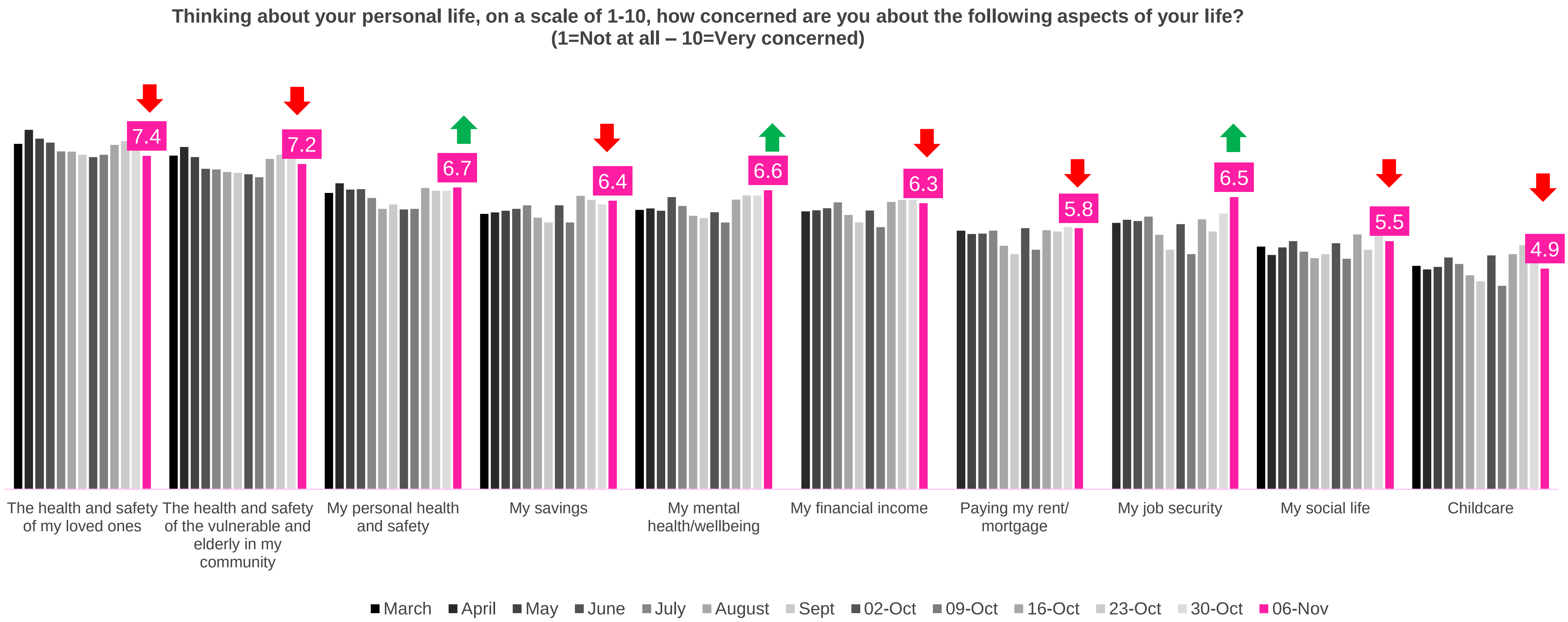
Concerns over personal health and safety and mental health and wellbeing have seen increases this week



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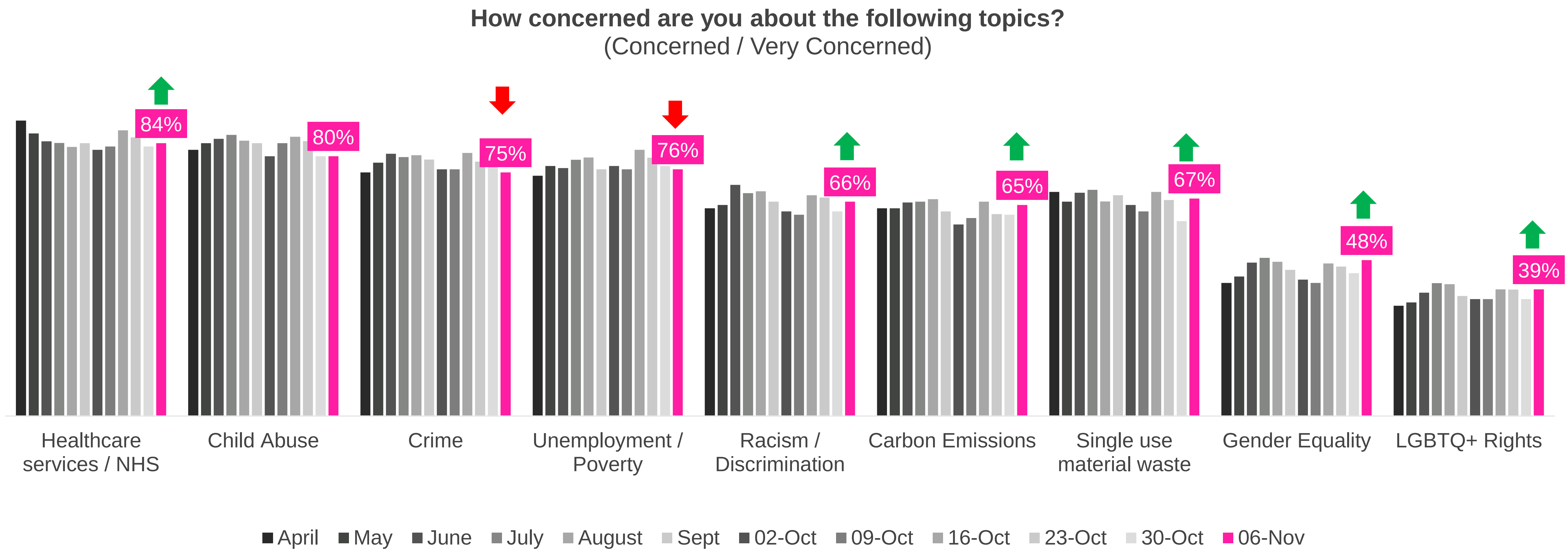
Most societal concerns have increased this week, particularly around single use plastic and gender equality



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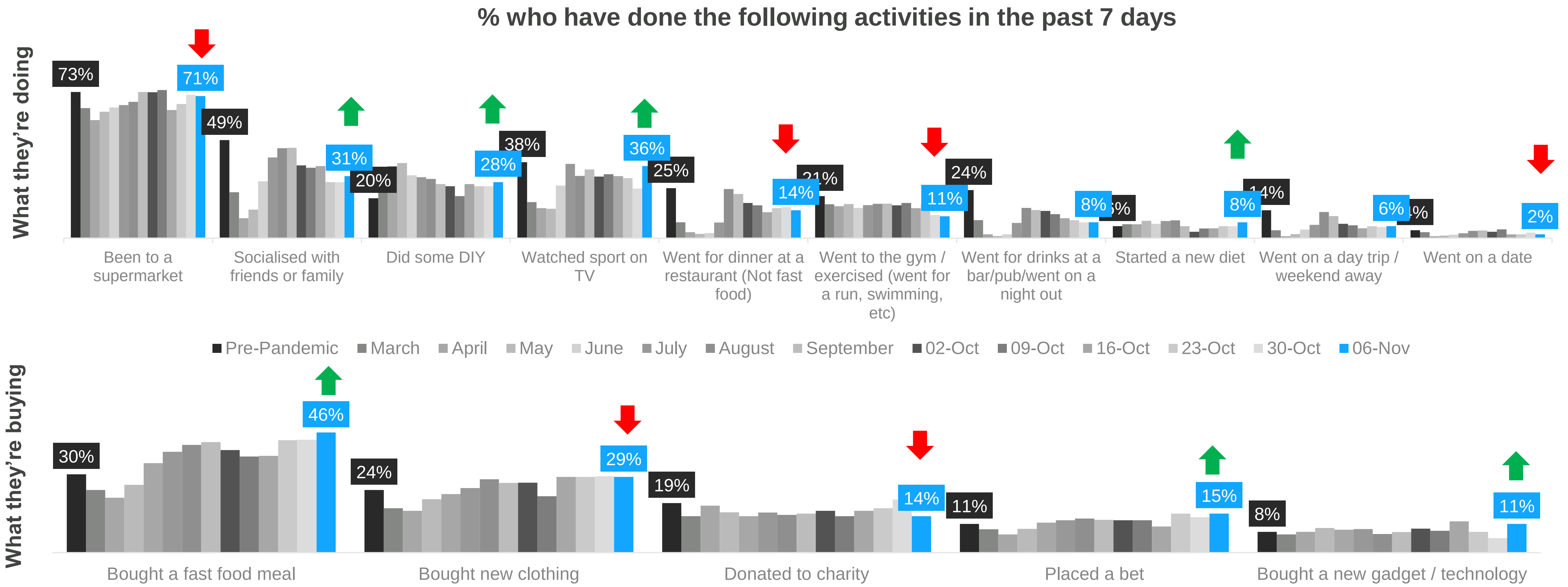
Changes in Behaviour

In the days leading up to lockdown 2.0, socialising with friends and family increased and more bought fast food meals



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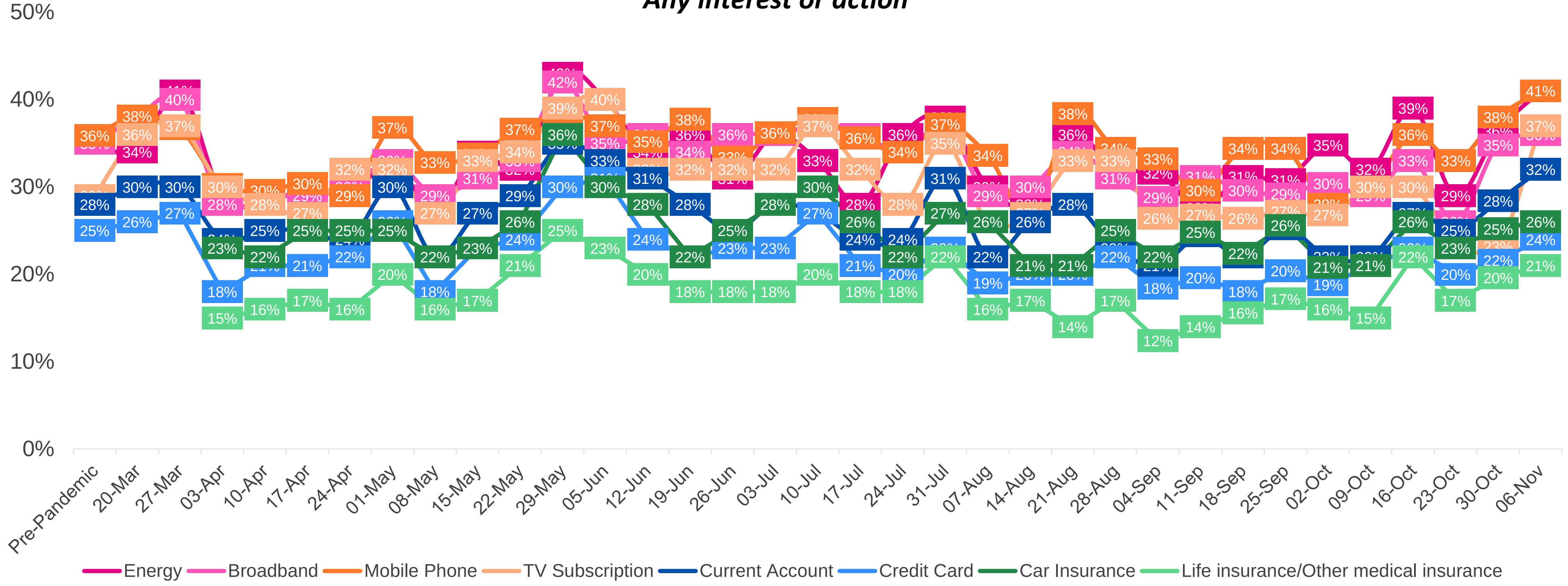
Interest in switching subscriptions or services has increased across all categories

Have you talked about, researched, bought any of the following in the past 4 weeks?

Any interest or action



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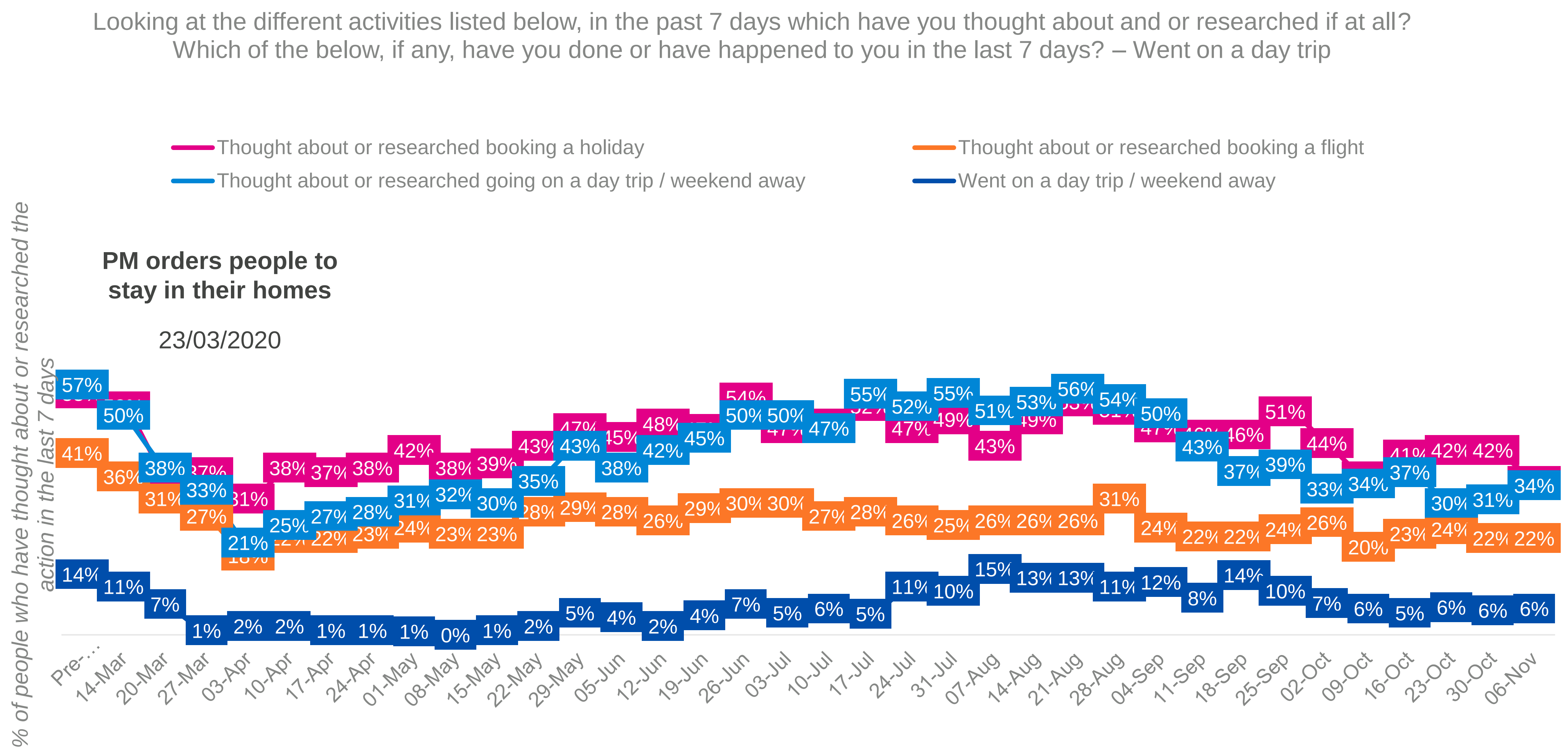
Interest in holidaying remains steady week-on-week

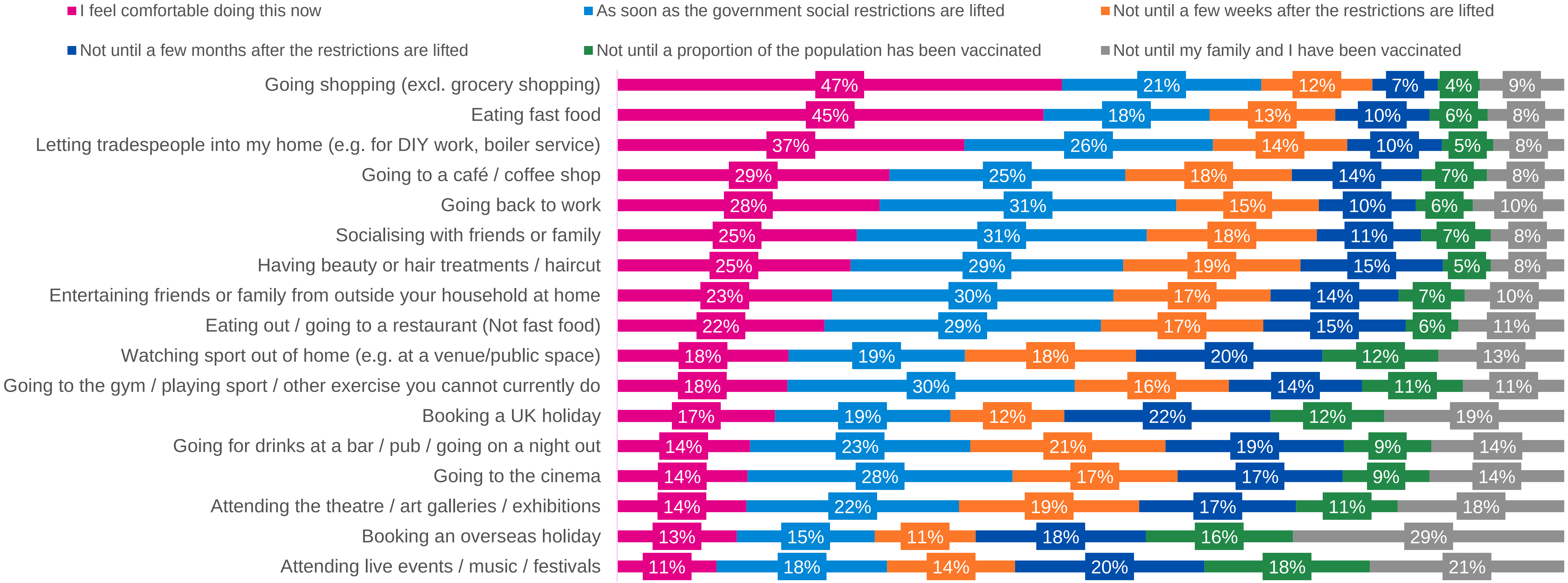


Looking ahead

Following the introduction of national lockdown in England, there have been declines in the percentage of people who feel comfortable with most activities

There have been notable drops in the percentage of people feeling comfortable going back to work (-22ppts), having hair/beauty treatments (-14ppts), eating out (-9ppts) and going shopping (-7ppts)

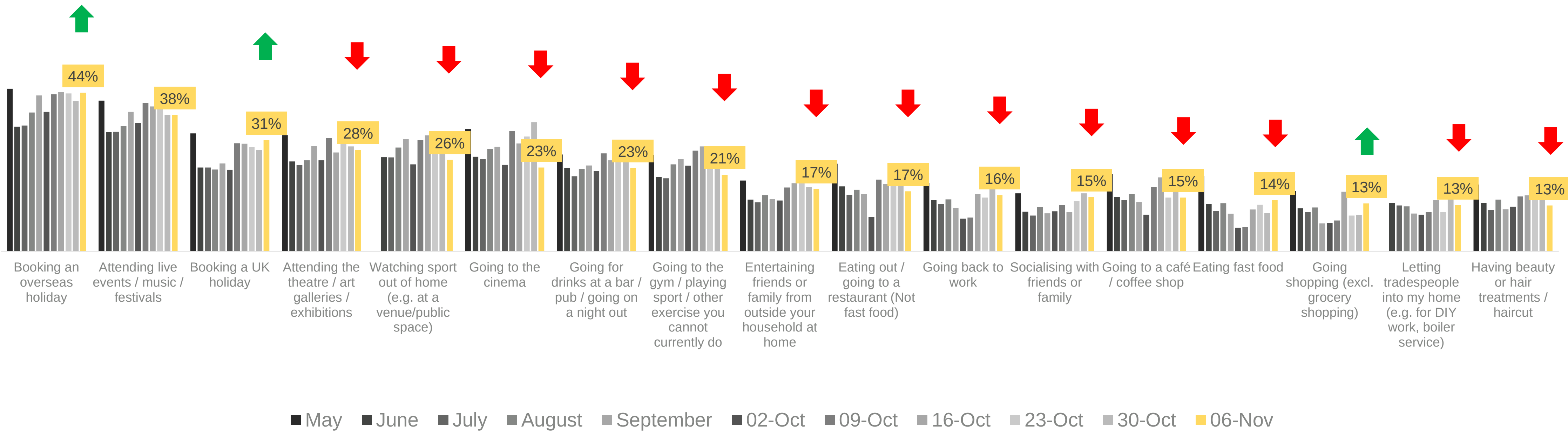
When would you feel comfortable doing the following again?



Source: OMD Radar Survey. 06/11: 250. Amongst those who would usually conduct each activity (bases all above 160).

Despite feeling less comfortable with activities now, fewer people would wait for a vaccine for most activities compared with last week

When would you feel comfortable doing the following again?
(Not until a significant proportion of the population has been vaccinated / Not until my family and I have been vaccinated)



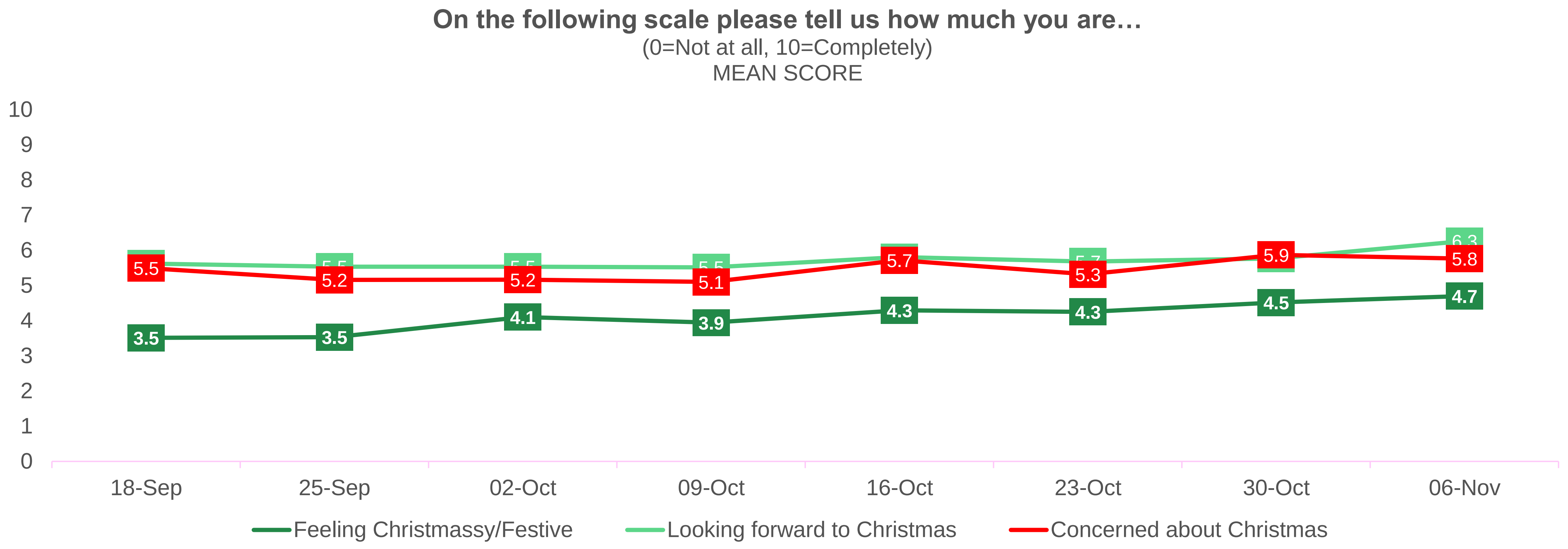
Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500. 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 28/08:250, 04/09:250, 11/09:250, 18/09:250, 25/09:250, 02/10:250, 09/10:250, 16/10:250, 23/10: 254, 30/10: 250, 06/11:250

CHRISTMAS 2020

Expectations for Christmas 2020 have been tracked since April 2020 and additional points have been added through the year and will continue to be added in order to remain as relevant as possible in rapidly changing landscape

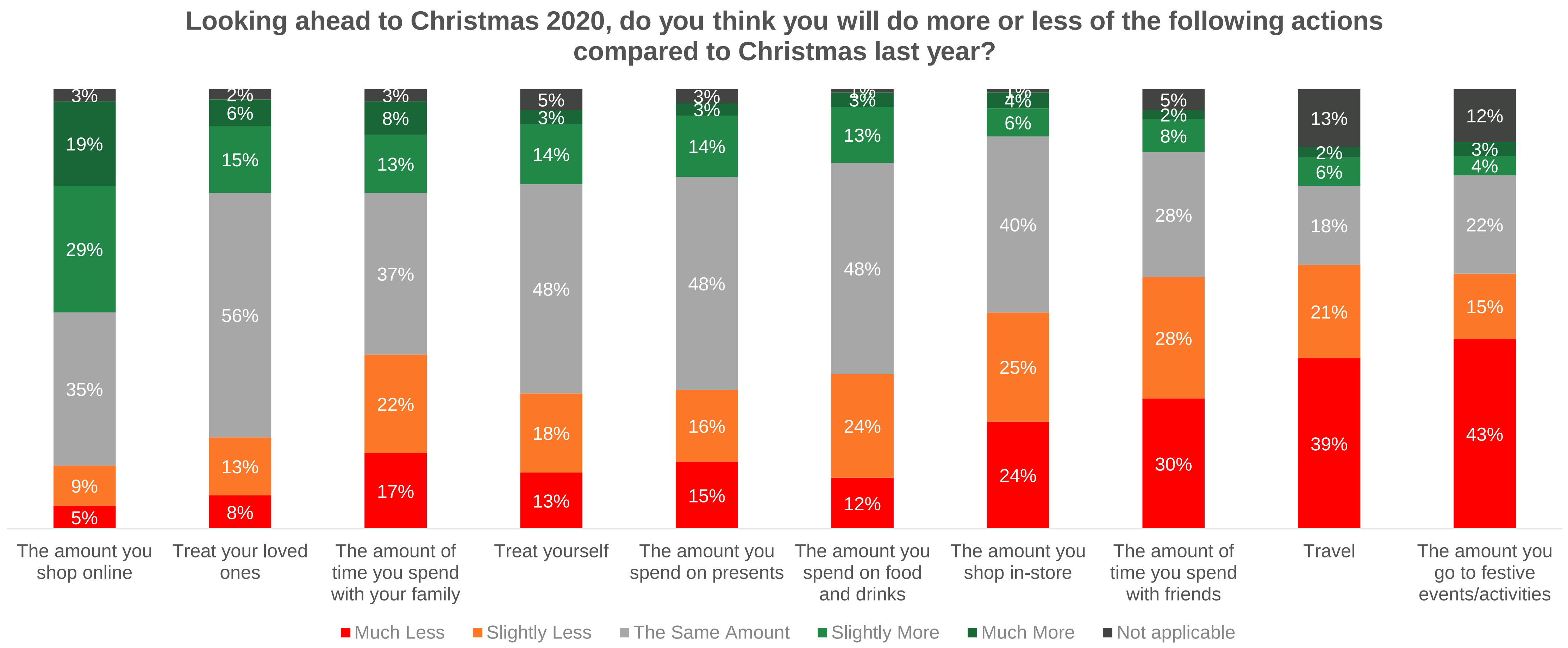
Despite the introduction of Lockdown 2.0, the nation is looking forward to Christmas and gradually feeling more festive

Concern about Christmas has seen a slight dip, potentially the result of an end-date of 2nd December announced by the Government



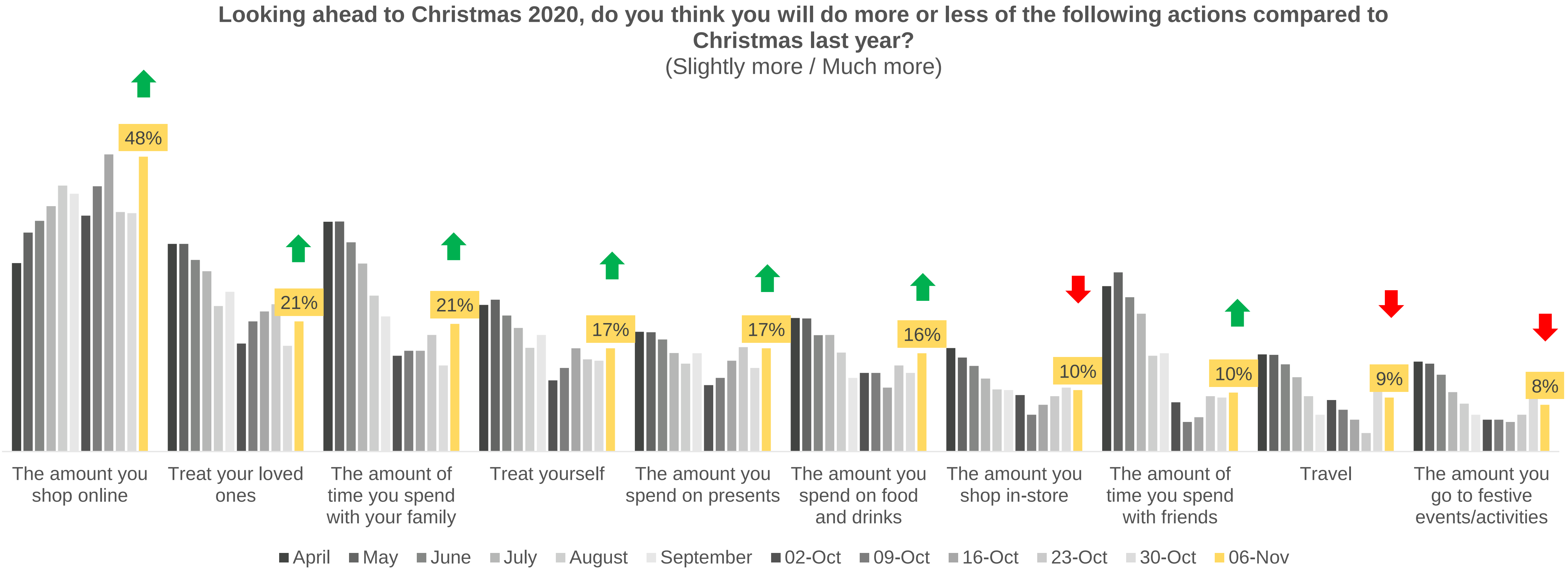
Source: OMD Radar Survey. 18/09:250, 25/09:250, 02/10:250, 09/10:250, 16/10:250, 23/10: 254, 30/10: 250, 06/11:250

The introduction of national lockdown in England has had minimal impact on expectations for Christmas, as people were already expecting to adapt their behaviours



Source: OMD Radar Survey. 06/11: 250

The outlook on how much people will treat themselves and others, as well as spending time with family have improved this week



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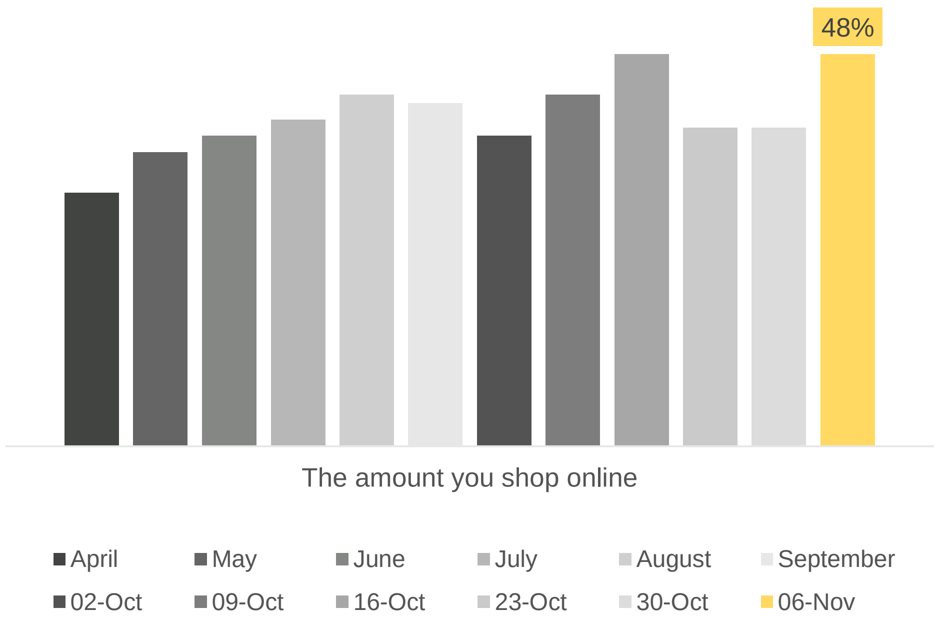
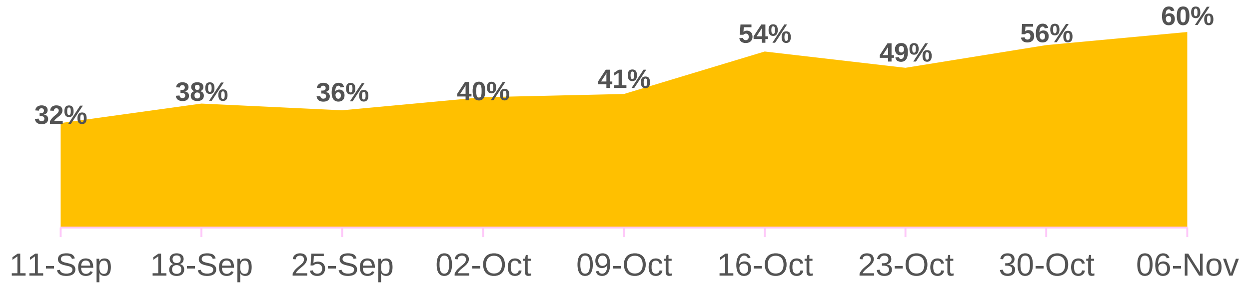
6 in 10 Christmas shoppers have already purchased a Christmas gift this year, with the majority of purchases being made online

Estimates of shopping more online are ringing true, with 95% of those who have purchased at least one Christmas gift have purchased a gift online

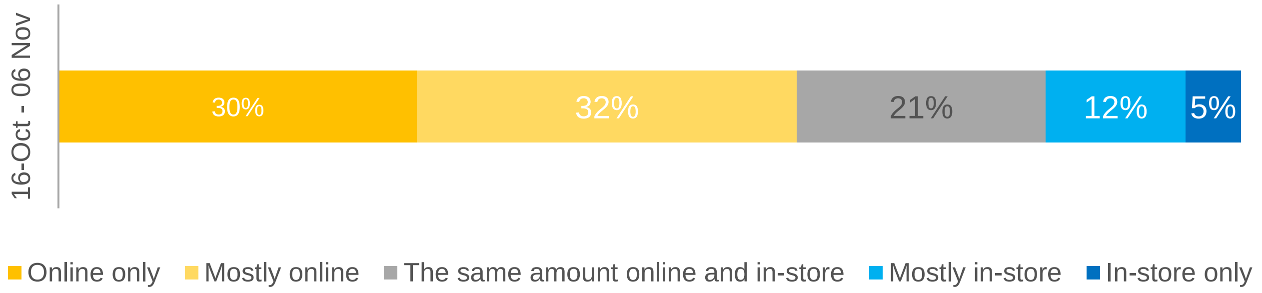
Looking ahead to Christmas 2020, do you think you will do more or less of the following actions compared to Christmas last year?
(Slightly more / Much more)



Purchased a Christmas present *



For the Christmas gifts you have bought so far, which best describes how you've purchased them? **

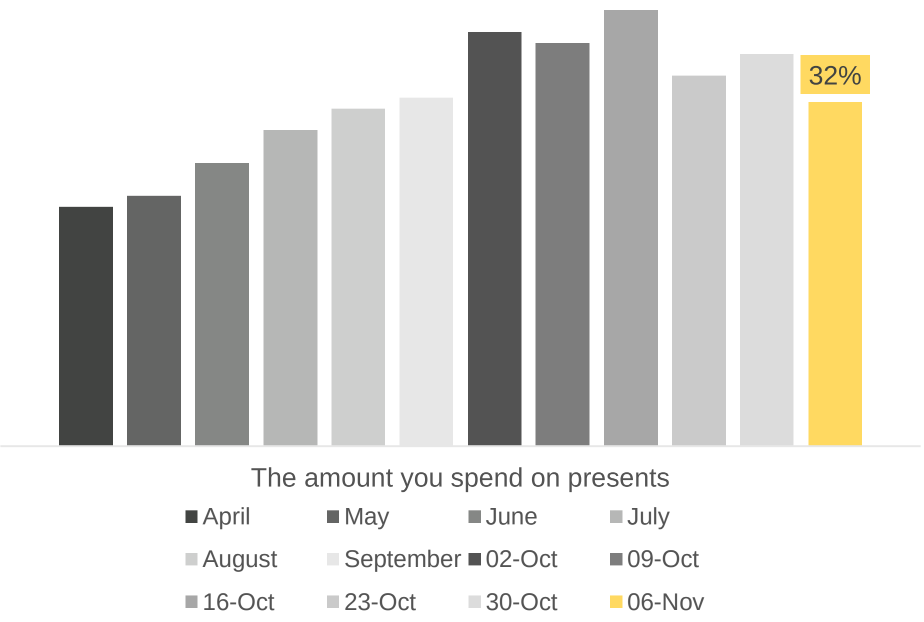


Source: OMD Radar Survey. *Give gifts at Christmas: 11/09:199, 18/09:208, 25/09:192, 02/10:206, 09/10:201, 16/10:202, 23/10:191, 30/10:200, 06/11:209 | **Have purchased Christmas gifts in 2020: 818

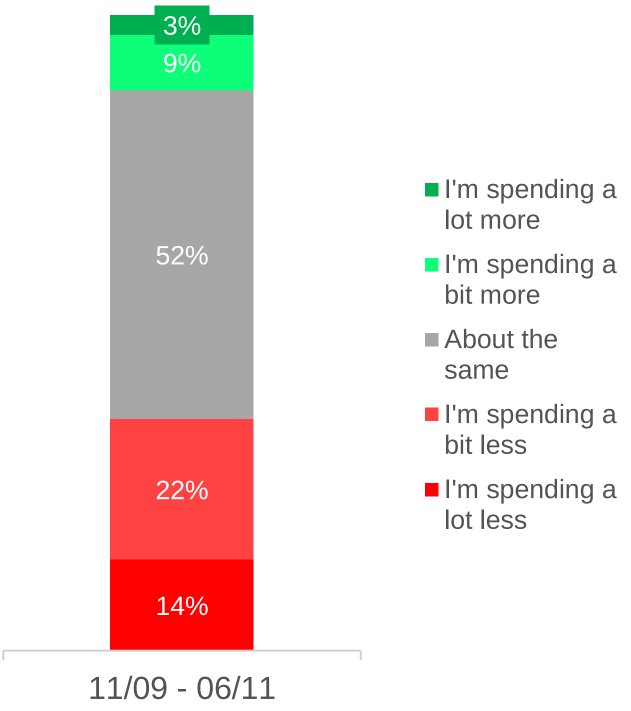
The expectation to spend less on presents is currently becoming a reality, with 1 in 3 people having spent less than this time last year

Shoppers expect to make cost savings on presents in various ways, with buying for fewer individuals as the top method

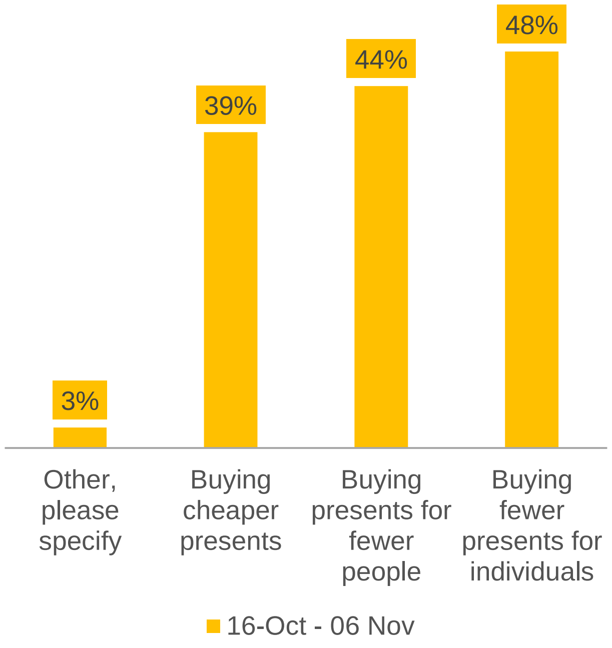
Looking ahead to Christmas 2020, do you think you will do more or less of the following actions compared to Christmas last year?
(Slightly less / Much less)



How do you think your spending on Christmas presents compares to last year so far? *



You said that you will be spending less on presents this year, how will you be doing so?

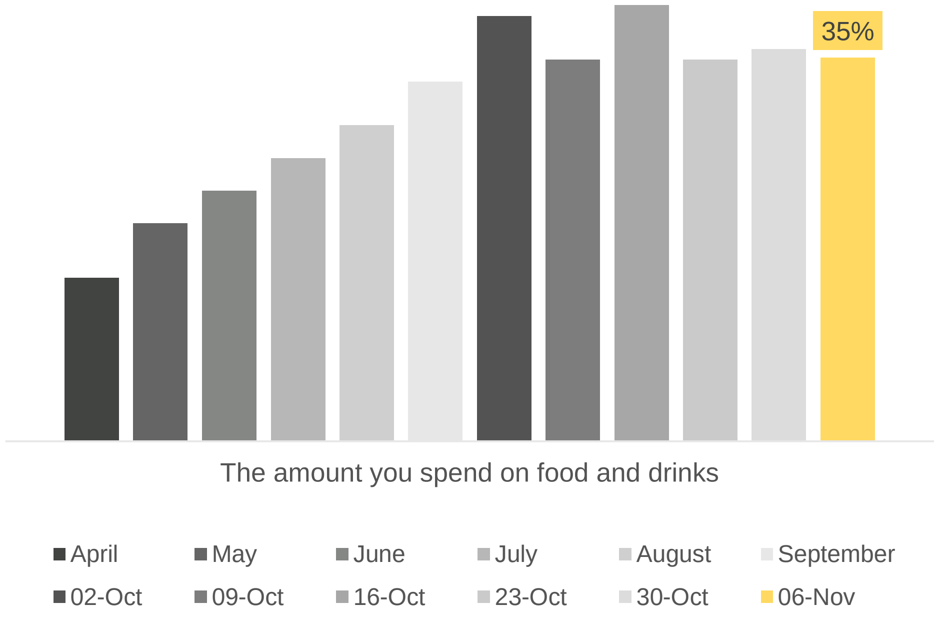


Source: OMD Radar Survey. Spending less on presents: 16/10 - 06/11:355 | *Have purchased Christmas gifts in 2020 (11/09 – 06/11): 1808

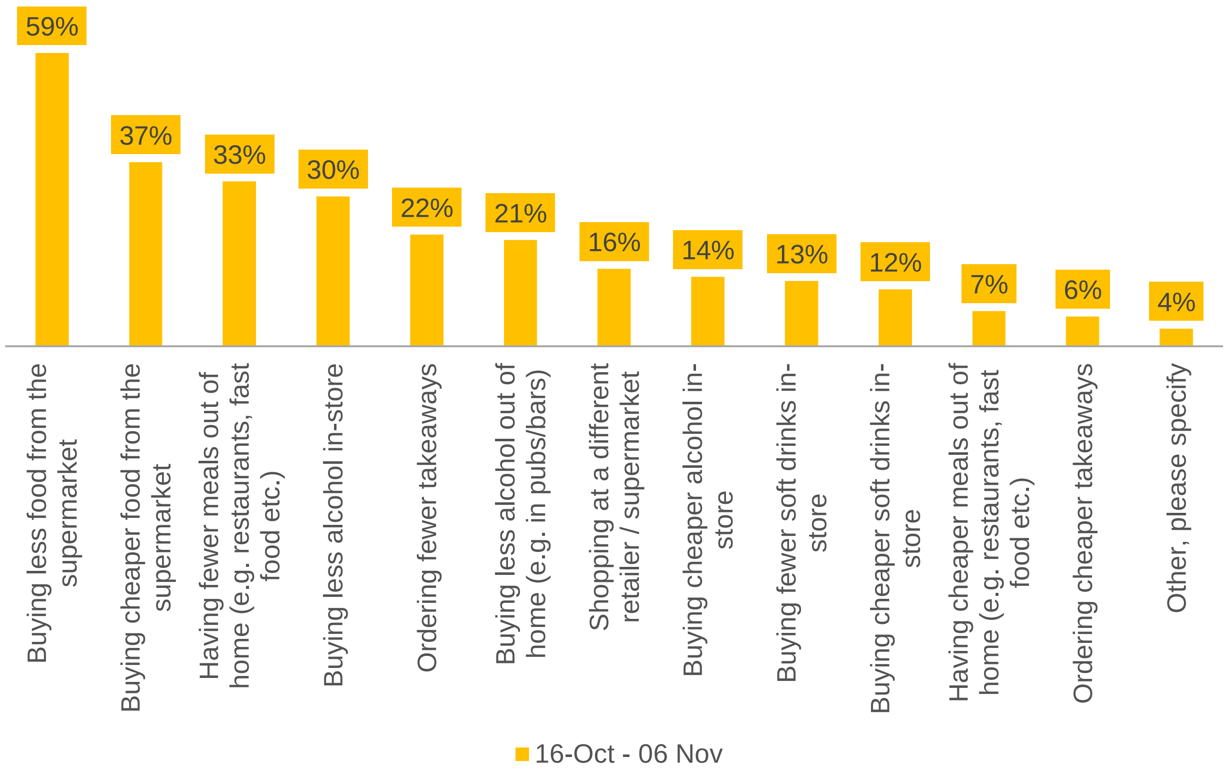
Cutting back on the amount of food purchased is the primary way that shoppers expect to spend less on food and drinks this Christmas

As with gifting, shoppers expect to buy cut back on the amount purchased, rather than purchasing 'cheaper' items across product categories

Looking ahead to Christmas 2020, do you think you will do more or less of the following actions compared to Christmas last year?
(Slightly less / Much less)



You said that you will be spending less on food and drinks this year, how will you be doing so?

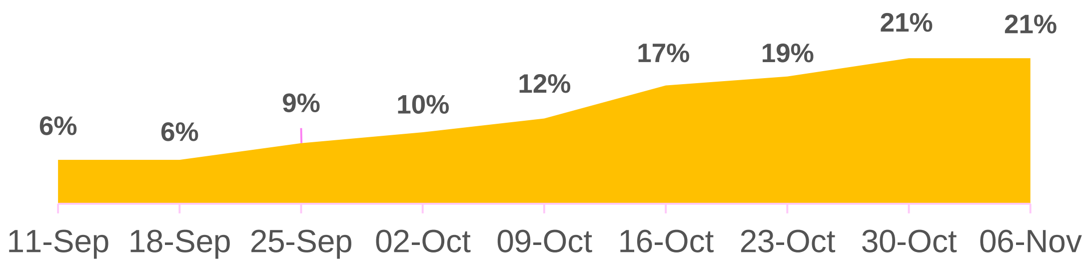


Source: OMD Radar Survey. Spending less on food and drink: 16/10 - 06/11:365

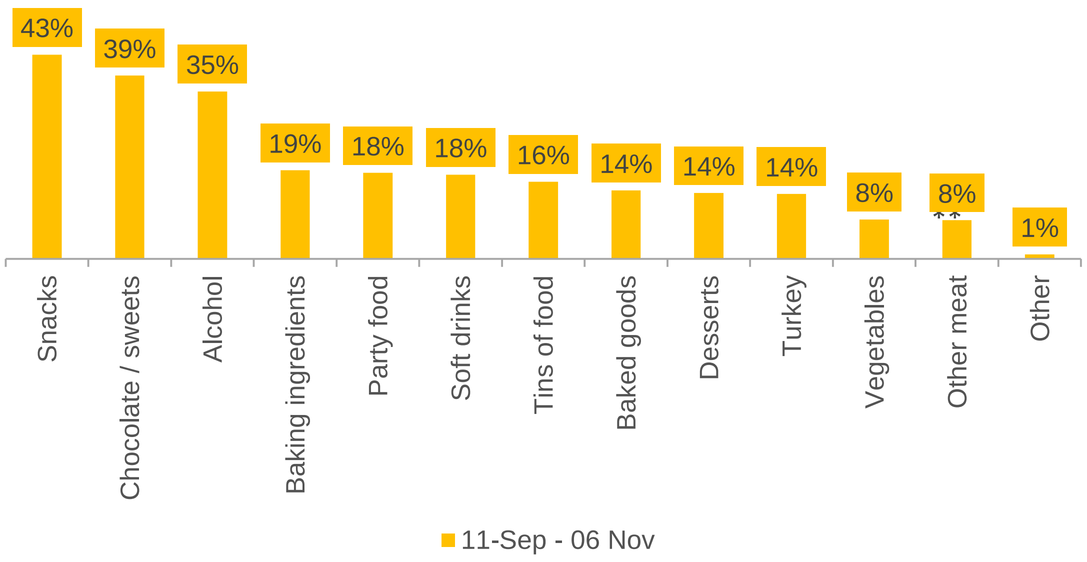
Though 1 in 3 intend to spend less, more than 1 in 5 people had already purchased Christmas grocery items by the end of October

Snacks, confectionary and alcohol are the most commonly purchased items so far this year

Have you bought any Groceries for Christmas yet? (e.g food, drinks or snacks)
Yes



You said you have bought Groceries for Christmas, which of the categories below best describe what you bought? *



Source: OMD Radar Survey. .11/09:250, 18/09:250, 25/09:250, 02/10:250, 09/10:250, 16/10:250, 23/10: 254, 30/10: 250, 06/11:250 | *Have purchased Christmas groceries in 2020: 541

Appendix

Survey Timeline

50 weeks of historic Radar survey data

Radar Survey 51
Covid-19 Special #1
Friday 20/03/2020

Radar Survey 52
Covid-19 Special #2
Friday 27/03/2020

Radar Survey 53
Covid-19 Special #3
Friday 03/04/2020

Radar Survey 54
Covid-19 Special #4
Thursday 09/04/2020

Radar Survey 55
Covid-19 Special #5
Friday 17/04/2020

Radar Survey 56
Covid-19 Special #6
Friday 24/04/2020

Schools, Pubs & Restaurants to close on 20th March
18/03/2020

PM orders people to stay in their homes
23/03/2020

Round of applause for the NHS
26/03/2020

Johnson & Hancock test positive
28/03/2020

A million people sign up to universal credit
02/04/2020

Johnson moved to ICU
06/04/2020

Easter Bank Holiday
10/04/2020-13/04/2020

Raab announces lockdown will continue for "at least" another three weeks
16/04/2020

Coronavirus testing extended to all essential workers in England who have symptoms
23/04/2020

Radar Survey 57
Covid-19 Special #7
Friday 01/05/2020

Radar Survey 58
Covid-19 Special #8
Thursday 07/05/2020

Radar Survey 59
Covid-19 Special #9
Friday 15/05/2020

Radar Survey 60
Covid-19 Special #10
Friday 22/05/2020

Radar Survey 61
Covid-19 Special #11
Friday 29/05/2020

Radar Survey 62
Covid-19 Special #12
Friday 05/06/2020

Boris Johnson returns to work on the 26th of April and promises to release plan for return to schools and work next week
30/04/2020

Early May Bank Holiday
08/05/2020

Boris Johnson announces road map for easing social distancing measures
10/05/2020

The government said its test, track and trace system will be in place by 1 June
21/05/2020

Groups of up to six can meet outdoors and in back gardens
28/05/2020

Face coverings to be made compulsory on public transport
04/06/2020

Survey Timeline

62 weeks of historic Radar survey data

Radar Survey 63
Covid-19 Special #13
Friday 12/06/2020

Radar Survey 64
Covid-19 Special #14
Friday 19/06/2020

Radar Survey 65
Covid-19 Special #15
Friday 26/06/2020

Radar Survey 66
Covid-19 Special #16
Friday 03/07/2020

Radar Survey 67
Covid-19 Special #17
Friday 10/07/2020

Radar Survey 68
Covid-19 Special #18
Friday 17/07/2020

Non-essential retailers reopen
15/06/2020

Social Distancing reduced to 'one-metre plus'
23/06/2020

Pubs, restaurants and other businesses reopen
04/07/2020

PM says face coverings 'should be worn' in shops
13/07/2020

Radar Survey 69
Covid-19 Special #19
Friday 24/07/2020

Radar Survey 70
Covid-19 Special #20
Friday 31/07/2020

Radar Survey 71
Covid-19 Special #21
Friday 07/08/2020

Radar Survey 72
Covid-19 Special #22
Friday 14/08/2020

Radar Survey 73
Covid-19 Special #23
Friday 21/08/2020

Radar Survey 74
Covid-19 Special #24
Friday 28/08/2020

Oxford coronavirus vaccine triggers immune response, trial shows
20/07/2020

Announcement that Britons in Spain will have to quarantine for two weeks on returning
26/07/2020

Government's Eat Out To Help Out Initiative launches
03/08/2020

France added to UK Covid quarantine list
14/08/2020

Bowling alleys, theatres, music and performance venues and other culture, sport, leisure and business sectors reopen
15/08/2020

Bank Holiday
31/09/2020

Survey Timeline

74 weeks of historic Radar survey data

Radar Survey 75
Covid-19 Special #25
Friday 04/09/2020

Radar Survey 76
Covid-19 Special #26
Friday 11/09/2020

Radar Survey 77
Covid-19 Special #27
Friday 18/09/2020

Radar Survey 78
Covid-19 Special #28
Friday 25/09/2020

Radar Survey 79
Covid-19 Special #29
Friday 02/10/2020

Radar Survey 80
Covid-19 Special #30
Friday 09/10/2020

‘Eat Out to Help Out’ ends for most restaurants
01/09/2020

Government announces revised restrictions on social gatherings – limiting to 6 people
09/09/2020

Revised government restrictions on social gatherings come into place
14/09/2020

PM warns UK to follow COVID restrictions or risk second lockdown
22/09/2020

Chancellor of the Exchequer announces Winter Economy Plan
24/09/2020

Extended local lockdown measures in the North East
01/10/2020

Boris to announce tiered approach to lockdown measures
12/10/2020

Radar Survey 81
Covid-19 Special #31
Friday 16/10/2020

Radar Survey 82
Covid-19 Special #32
Friday 23/10/2020

Radar Survey 83
Covid-19 Special #33
Friday 30/10/2020

Radar Survey 84
Covid-19 Special #34
Friday 06/11/2020

London moved to Tier 2 COVID alert level
15/10/2020

Greater Manchester and areas in the Midlands move to Tier 3
20/10/1010-23/10/2020

PM announces month-long national lockdown to commence 05/11/2020
31/10/2020

National lockdown in England begins
05/11/2020