

COVID-19 Consumer Impact Report
w/c 14.12.20

OWNED



RADAR

THE FUTURE OF BRITAIN
YOUR VOICE

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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 89 weeks, surveyed over 26,000 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 11th December to Sunday 13th December 2020.



Summary: In the week that saw the first person in the UK receive a vaccine, happiness and optimism increased and nearly half finished their Christmas shopping, however finance woes continue to rise

- 01** **Life satisfaction** has increased 6ppts and **optimism** increased 5ppts this week. **Happiness** levels have also risen 2ppts from 31% to 33%.
 - 02** As per last week, despite improving attitudes, **finance woes** continue to rise as the percent of people feeling **financially secure** has decreased 3ppts from 40% to 37%.
 - 03** **Confidence in the Government's response** to COVID has **increased** slightly again this week, from 30% to 32%, thanks partly to the vaccine roll out, however this is still significantly lower vs pre-pandemic levels.
 - 04** This week, as we approach Christmas, we see **charitable giving** at its highest since tracking at 21%, as well as people treating themselves with half of the nation having bought a fast-food meal this week.
 - 05** In the week that vaccinations have started to be rolled out, the number of people **likely to wait for a vaccine before taking part in activities** has increased.
 - 06** As December progresses, people are continuing to feel **more festive** and **less concerned** about Christmas. 40% have **finished their Christmas shopping** and more people report watching **Christmas films** and listening to **Christmas music**.
-

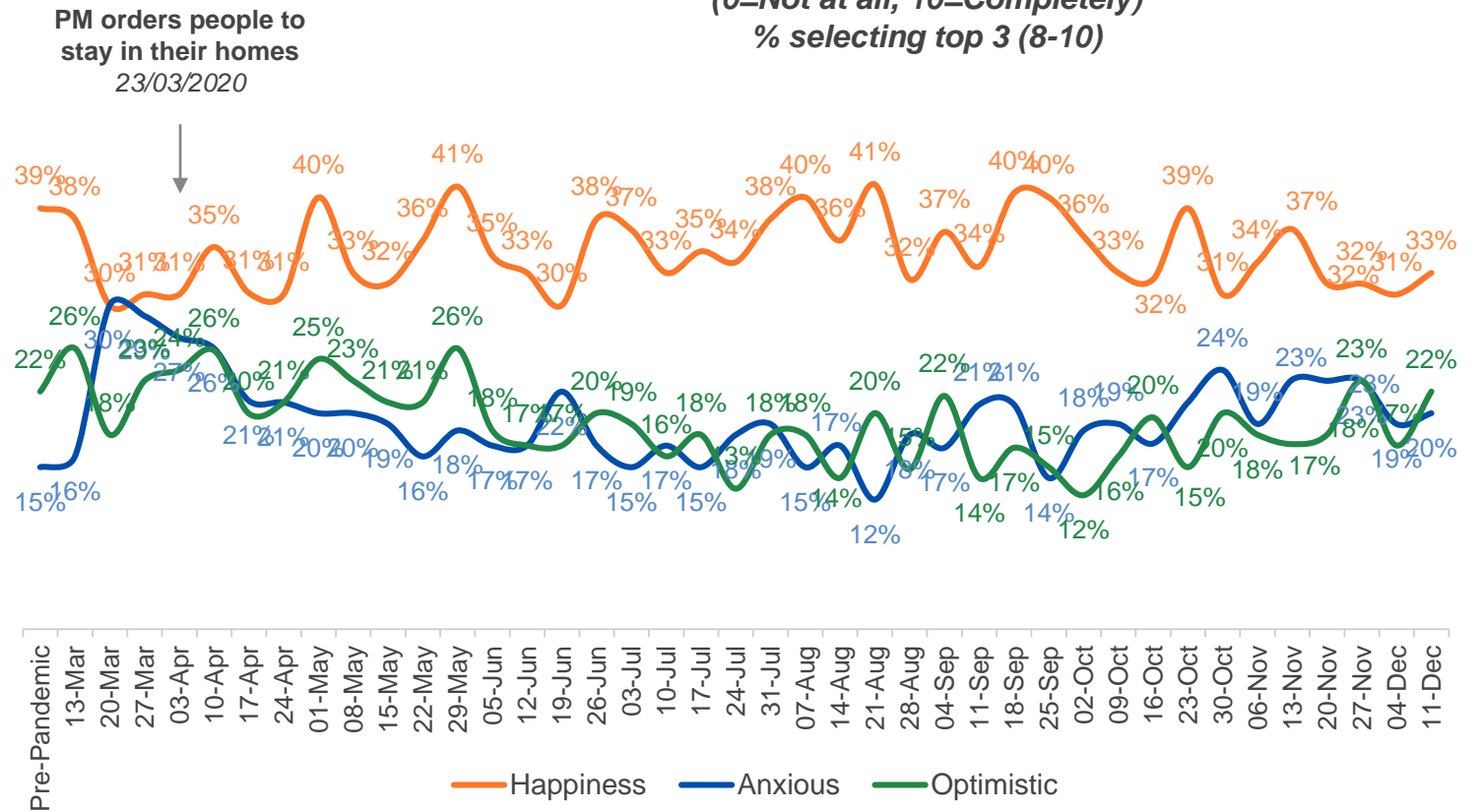






**Life satisfaction,
optimism & consumer
confidence**



Happiness, optimism and life satisfaction have all increased in the week that saw the first person in the UK to receive a COVID-19 vaccine

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



-  Happiness levels have increased 2ppts from 31% to 33%
-  Optimism has increased this week by 5ppts from 17% to 23%
-  Life satisfaction has increased 6ppts from 28% to 34%.
-  Anxiety levels have increased from 19% to 20% this week.



Feeling financially secure has decreased this week, however confidence in future business conditions has improved



The percent of people feeling financially secure has decreased 3ppts from 40% to 37%

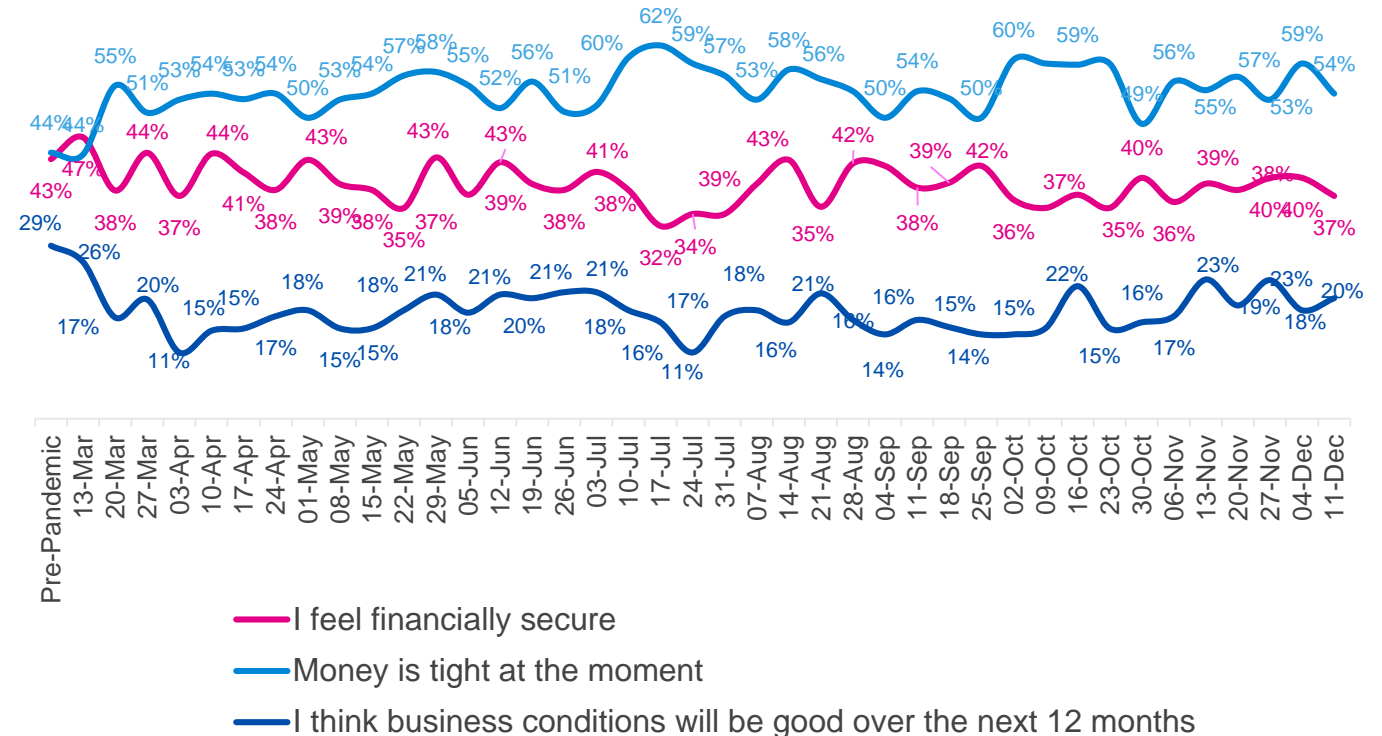


There has been a 5ppts decrease in the percentage of people reporting that money is tight, from 59% to 54%



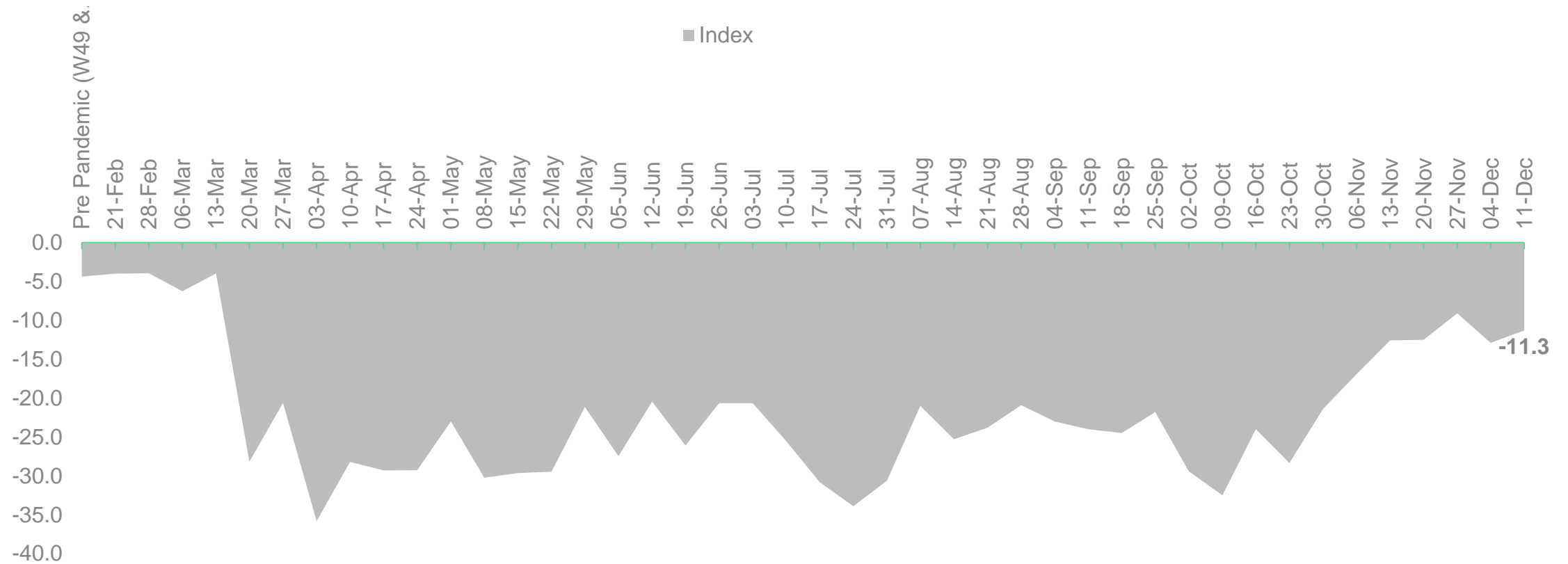
Confidence in future business conditions has decreased this week, from 18% to 20% in the last 7 days

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





Consumer Confidence has increased slightly this week from -12.9 to -11.3



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 removed 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.*



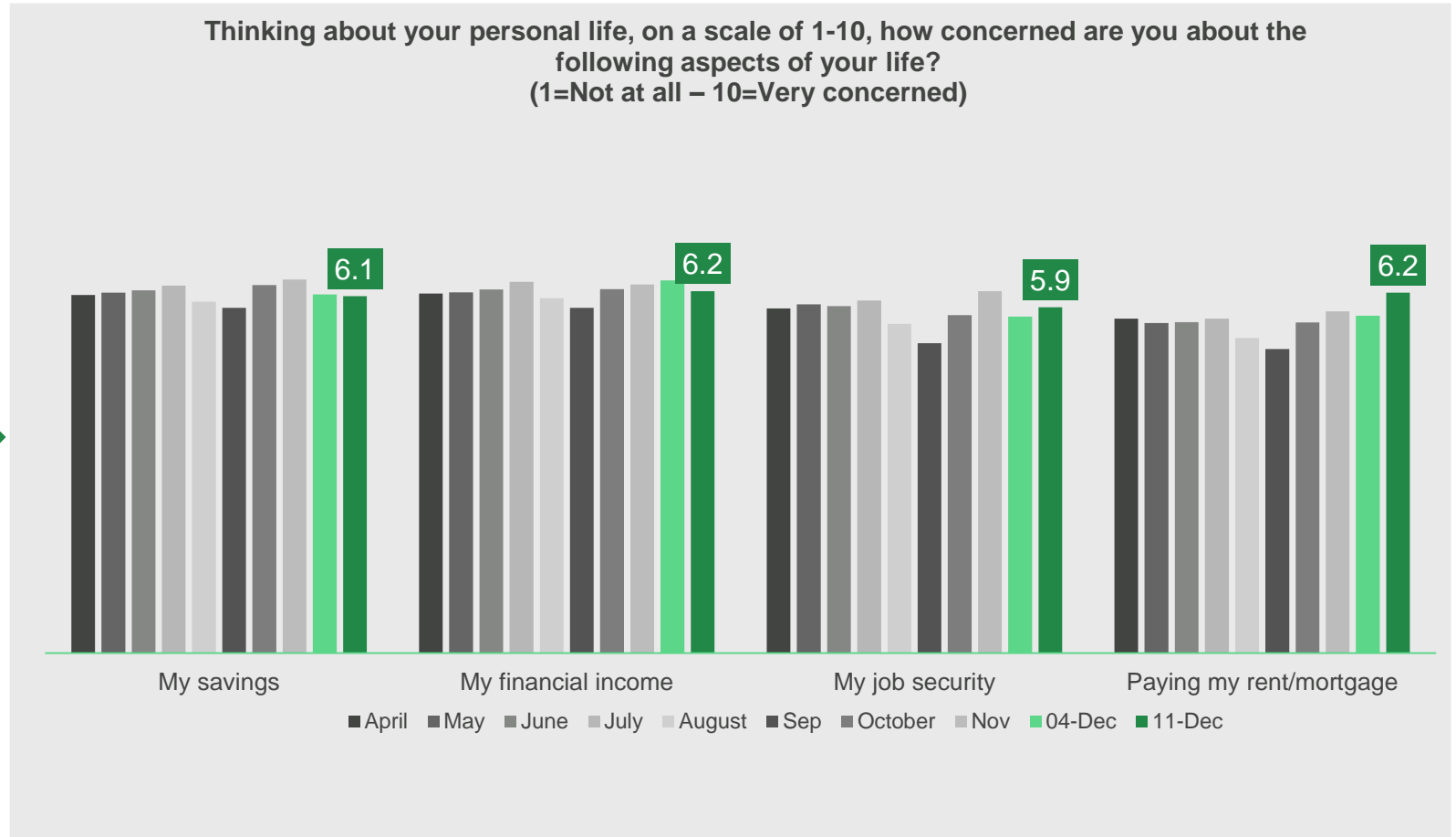
Concerns over financial income has increased slightly this week and the % of households with someone made redundant has increased 2ppts

6% of households have someone that has been **furloughed**

4% of households contain someone that has had their **salary reduced** since the COVID-19 outbreak

10% of households include someone that has **been made redundant** since the COVID-19 outbreak began

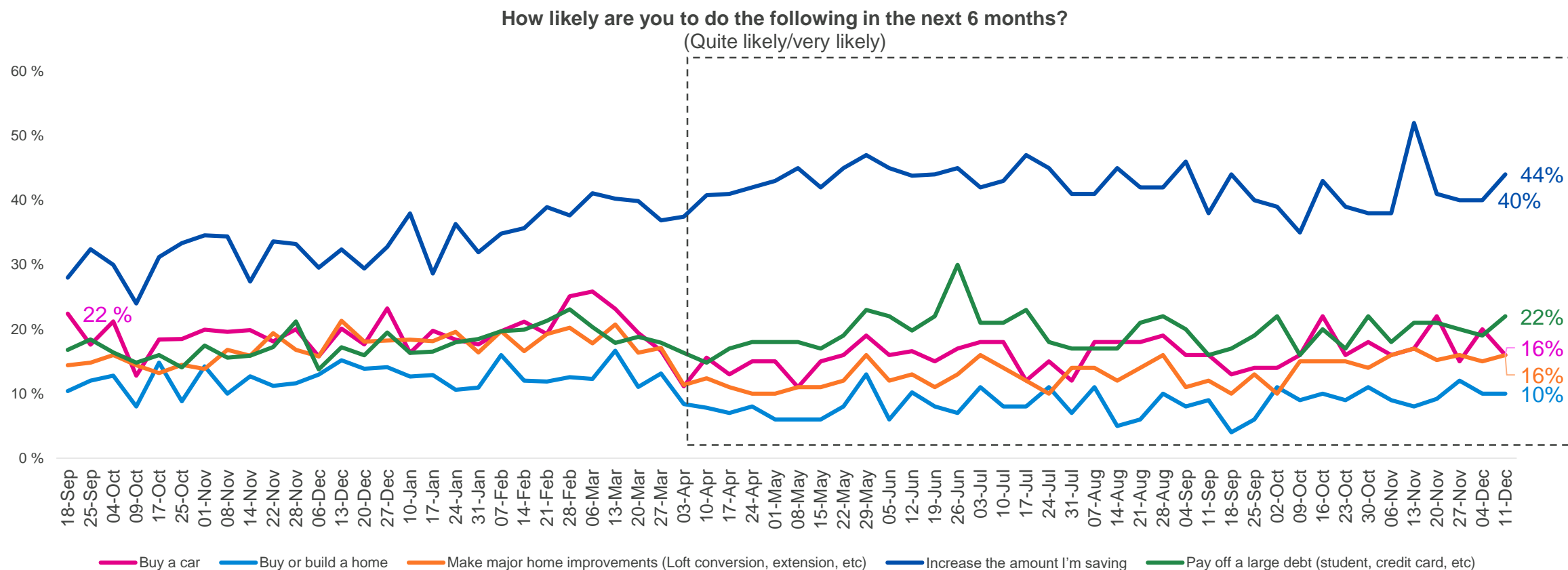
64% say that their employer has been **supportive** during the COVID-19 outbreak





Plans to increase savings in the next 6 months has increased 4ppts and plans to pay off a large debt has increased 3 ppts

Plans to buy or build a home and plans to buy a car have both decreased this week



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, 13/11:251, 20/11:250, 27/11:265, 04/12:250, 11/12:250

Confidence in Government & Broad Concerns



Confidence in the Government's response to COVID has increased again this week, from 30% to 32%

Complaints focus on perceived inconsistencies in the government's response to the virus to date:

“They just don't seem to be consistent and a lot of the rules don't make logical sense”

“Ad hoc, relying on the need to be popular above the need for expertise, chaotic and late to every decision”

“Constant change of advice”

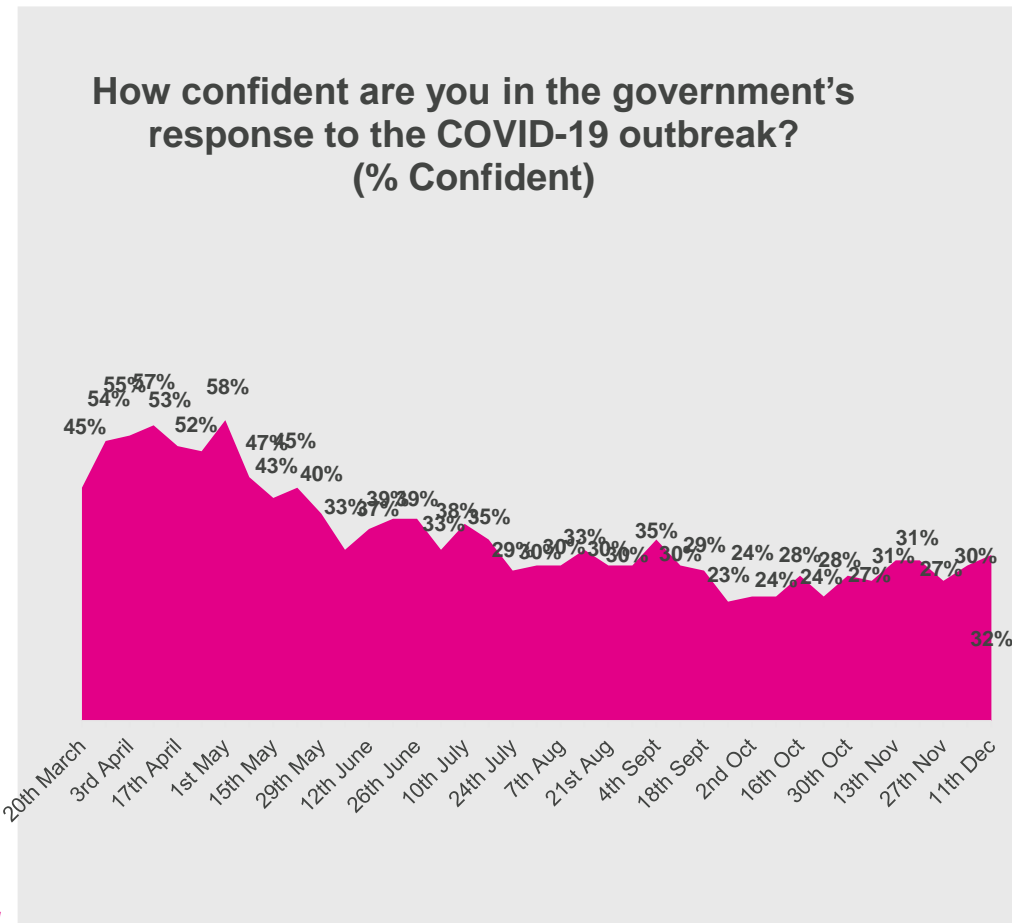
“I think the government was not anywhere near prepared for the virus. They waited when they should have acted. They have given out confusing information and have made some strange choices.”

However, there is recent vaccination roll out continues to garner support for the government:

“They seem to be trying to get the vaccine out”

“Doing the best that they can given that this is unprecedented. Seem to be doing better than many other countries when it comes to the vaccine ”

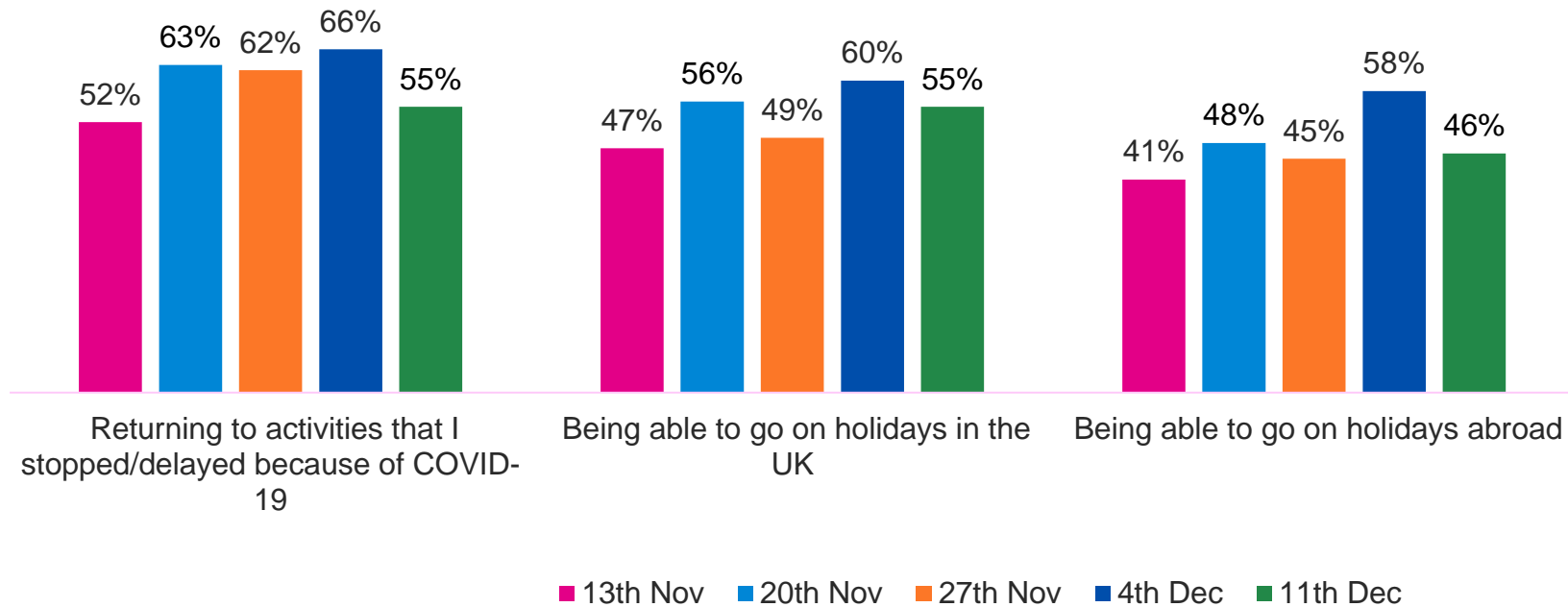
“I think they do the best they can with the advice they are given. Have done some great things for all who are affected by Covid 19. Rolling out the vaccinations, giving financial aid to Employers. Employees. Airlines and small businesses, and many more. Especially the NHS and Care Homes even though this aid to Care homes and staff came late..”





The nation's optimism for returning to activities and going on holiday in light of the vaccine has decreased this week

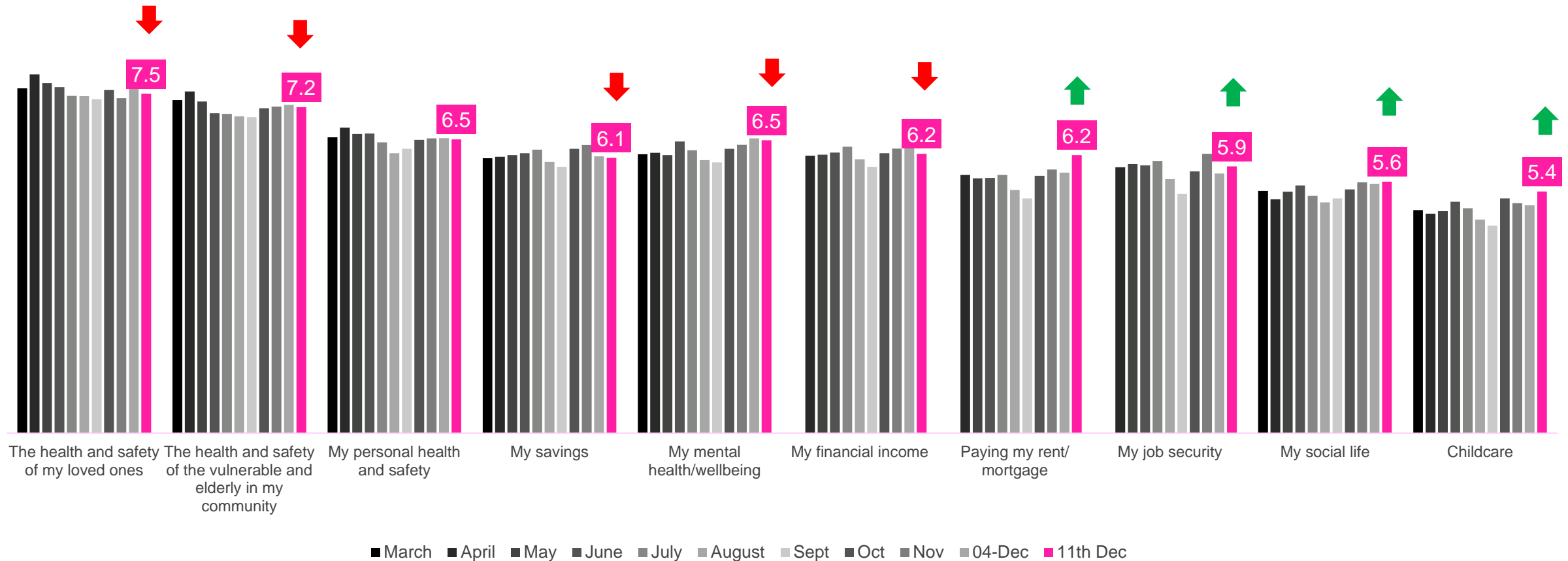
The extent to which people agree that news around a potential vaccine for COVID-19 in 2021 has made them optimistic about:
(Net Agree %)





Concerns over paying my rent/mortgage and job security has increased in the last week

Thinking about your personal life, on a scale of 1-10, how concerned are you about the following aspects of your life?
(1=Not at all – 10=Very concerned)

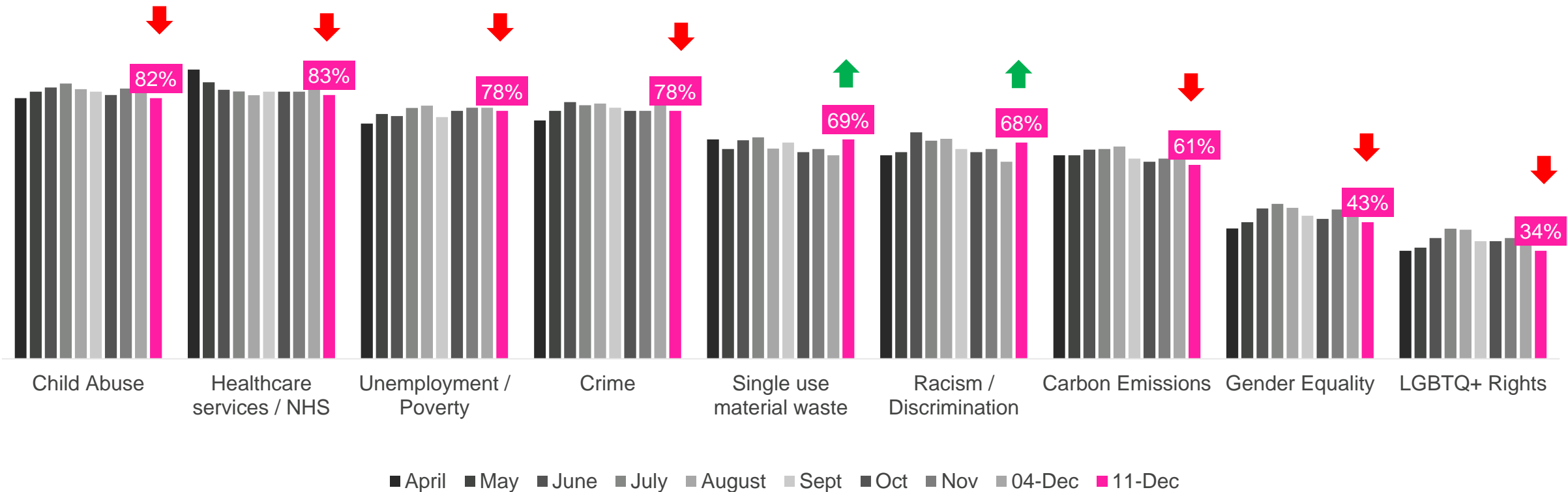


Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 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, 13/11:251, 20/11:250, 27/11:265, 04/12:250, 11/12:250



Concerns over Racism and Discrimination and the Environment have increased whilst concerns across other societal issues have decreased

How concerned are you about the following topics?
(Concerned / Very Concerned)



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, 13/11:251, 20/11:250, 27/11:265, 04/12:250, 11/12:250

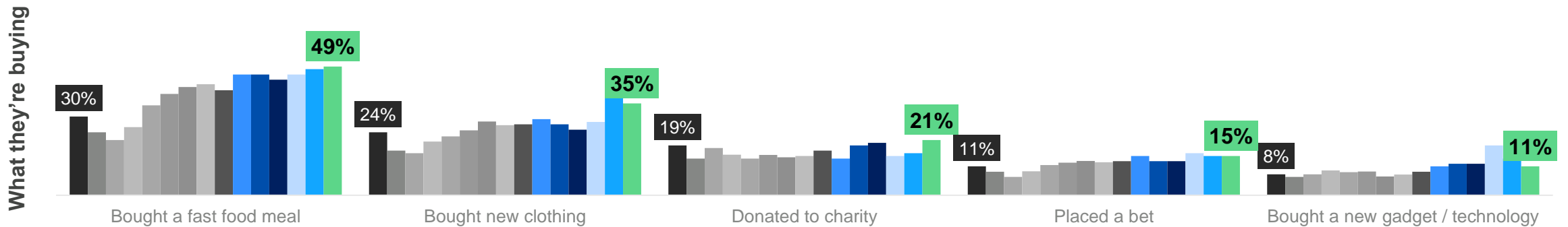
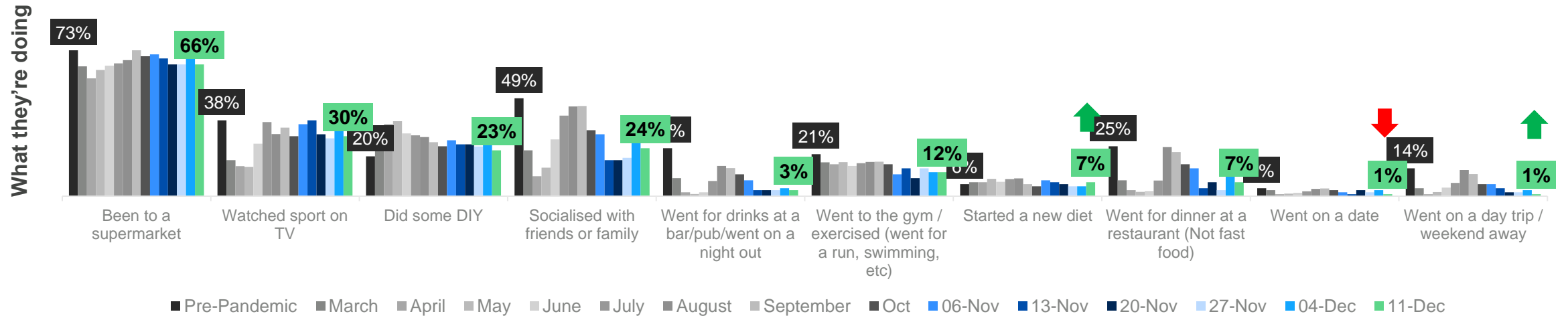


Changes in Behaviour



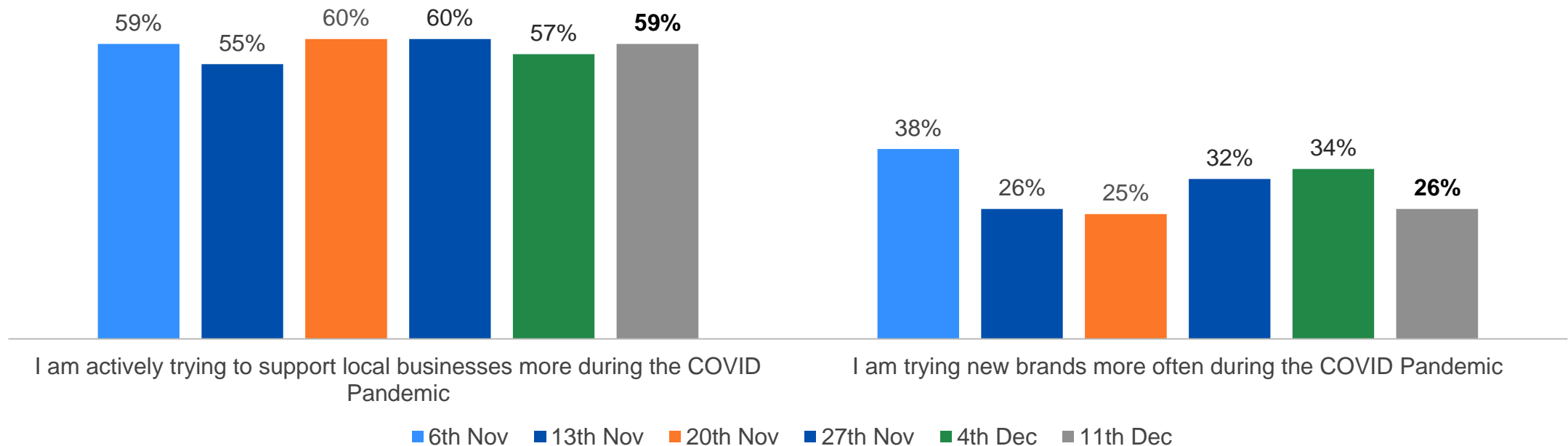
This week, as we approach Christmas, we see charitable giving at its highest since tracking at 21%, as well as people treating themselves with half of the nation having bought a fast food meal this week

% who have done the following activities in the past 7 days



Actively supporting local businesses remains high, with 6 in 10 people claiming to do so, and a quarter of Brits are trying new brands more often

To what extent do you agree with the following statements?
(Net Agree %)

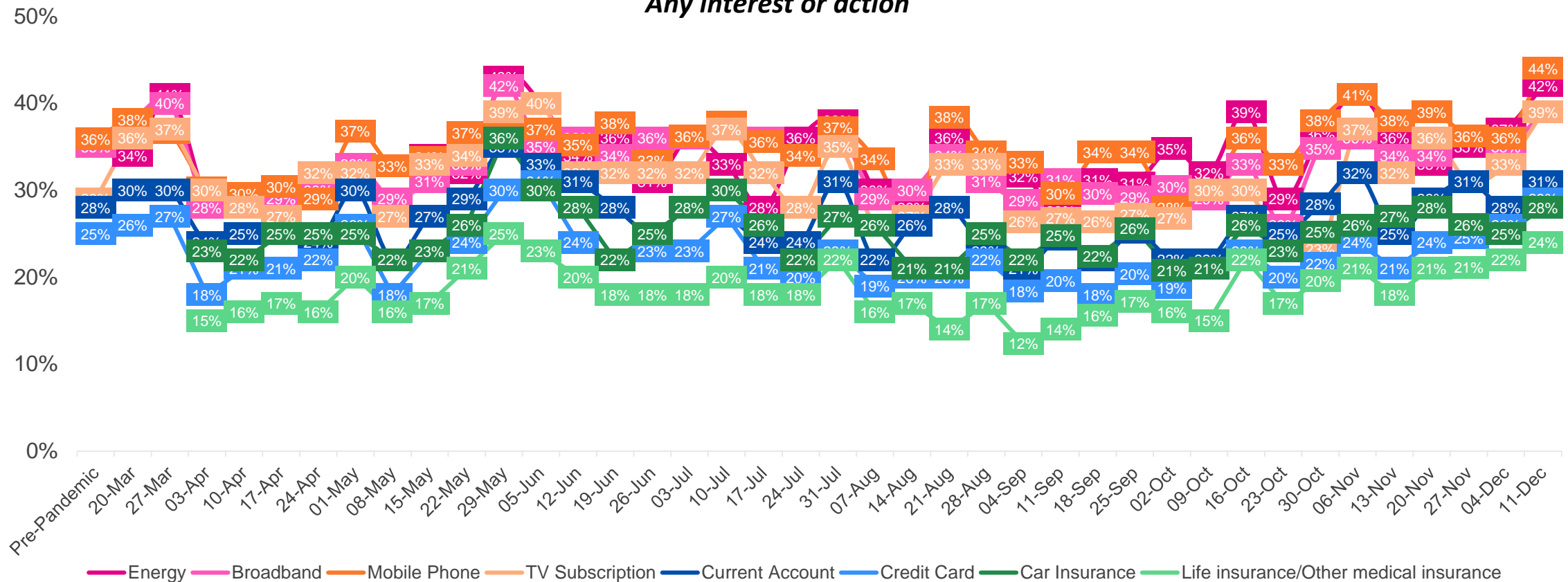




Interest in switching subscriptions or services has increased across the board this week, particularly for mobile phones and TV subscription services

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

Any interest or action

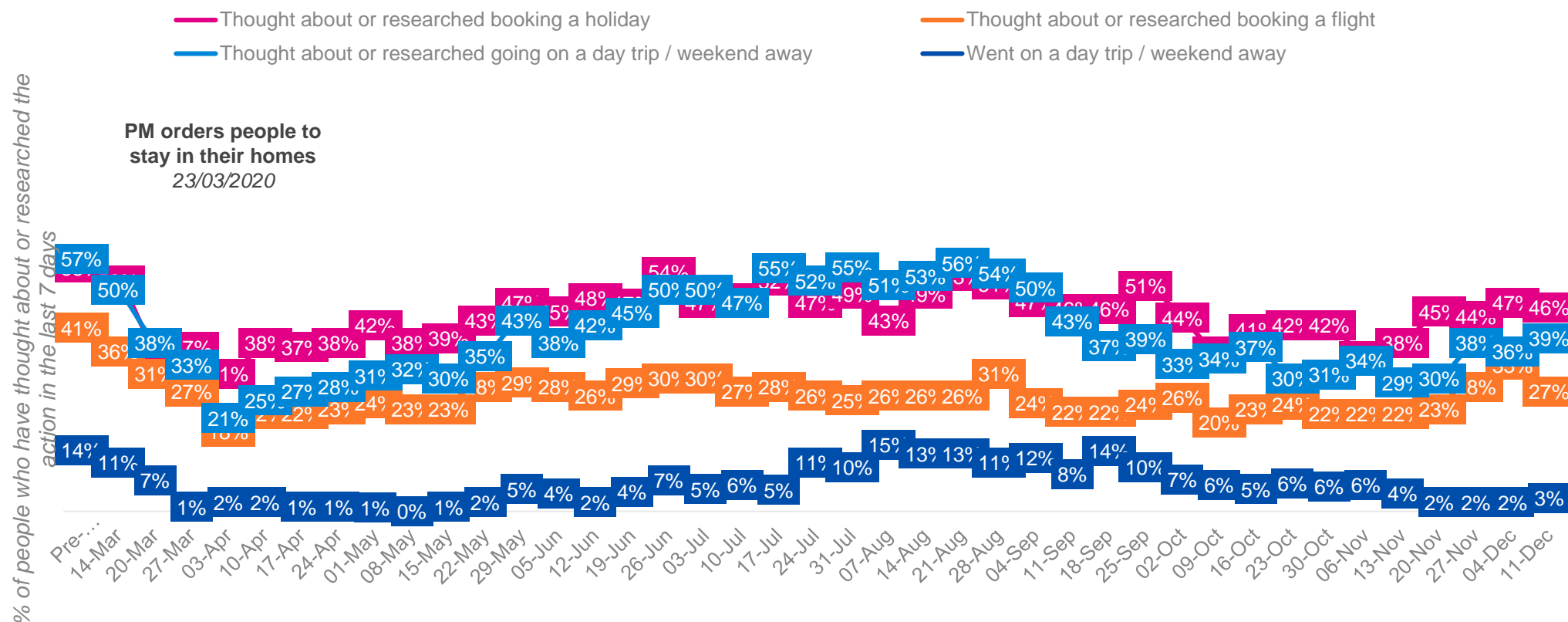


Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 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, 13/11:251, 20/11:250, 27/11:250, 4/12:250, 11/12:250.



Interest in going on weekends away has increased this week (+3ppts), with interest in book flights and holidays dipping slightly

Looking at the different activities listed below, in the past 7 days which have you thought about and or researched if at all?
Which of the below, if any, have you done or have happened to you in the last 7 days? – Went on a day trip





Looking ahead

The top activities that the UK are comfortable doing are eating fast food, grocery shopping and going back to work

When would you feel comfortable doing the following again?

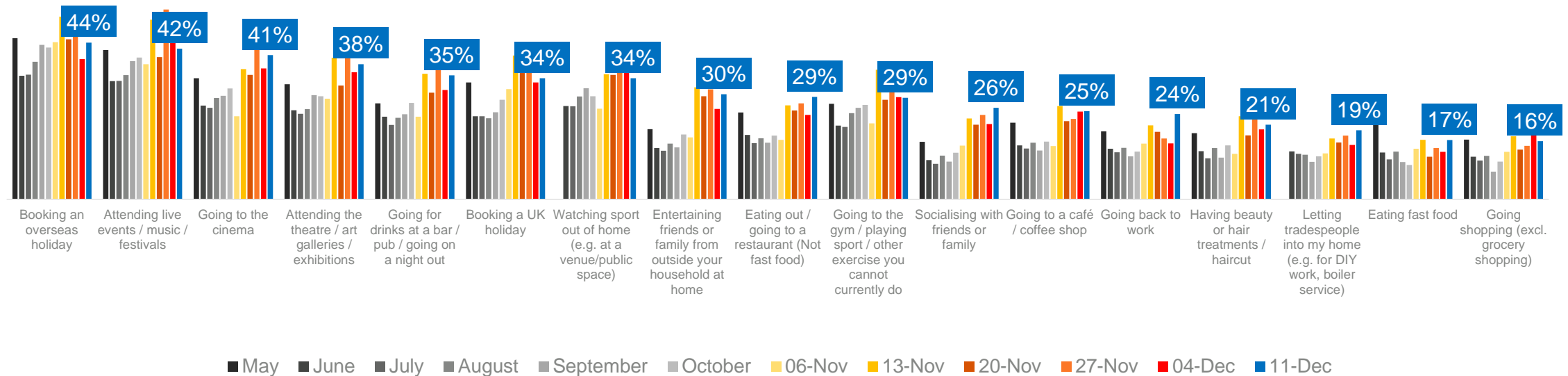




In the week that vaccinations have started to be rolled out, the number of people likely to wait for a vaccine before taking part in activities has increased

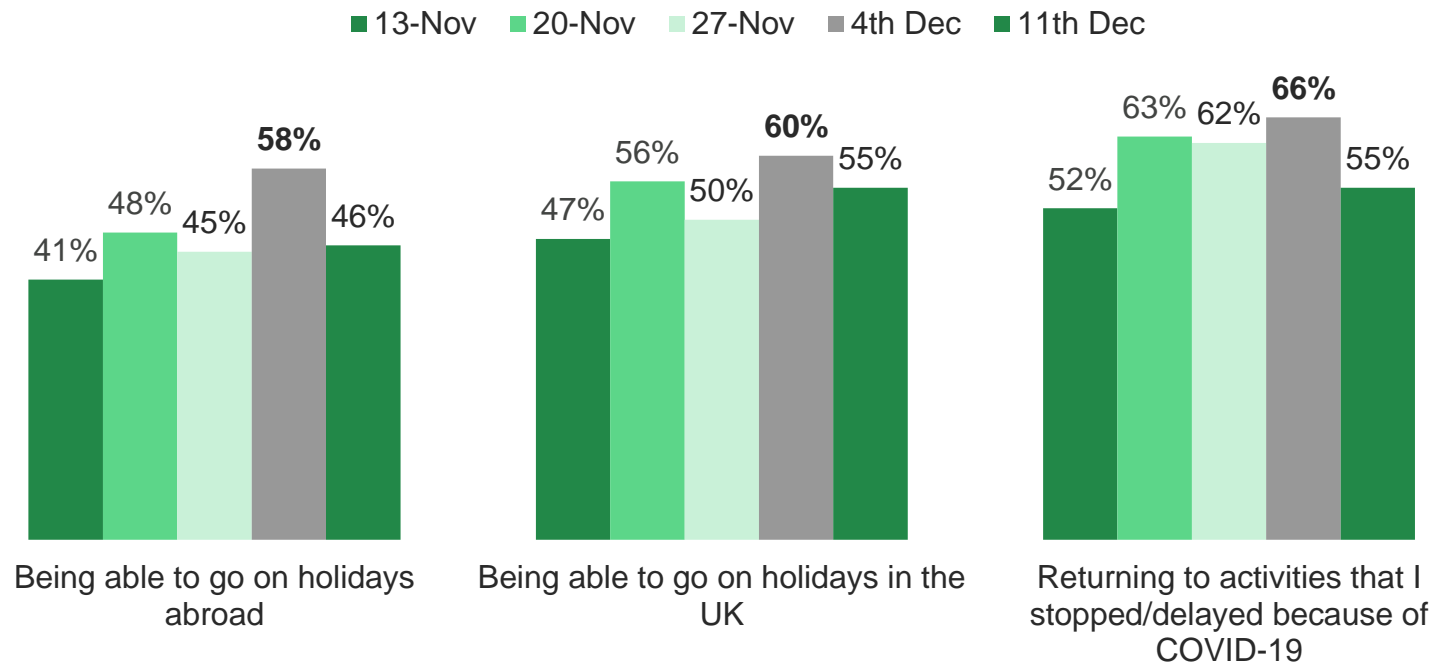
When would you feel comfortable doing the following again?

(Not until a significant proportion of the population has been vaccinated / Not until my family and I have been vaccinated)



Over half of the population are now feeling more optimistic about 2021 leisure plans due to advances in vaccination news

The news around a potential vaccine for COVID-19 in 2021 has made me optimistic about...



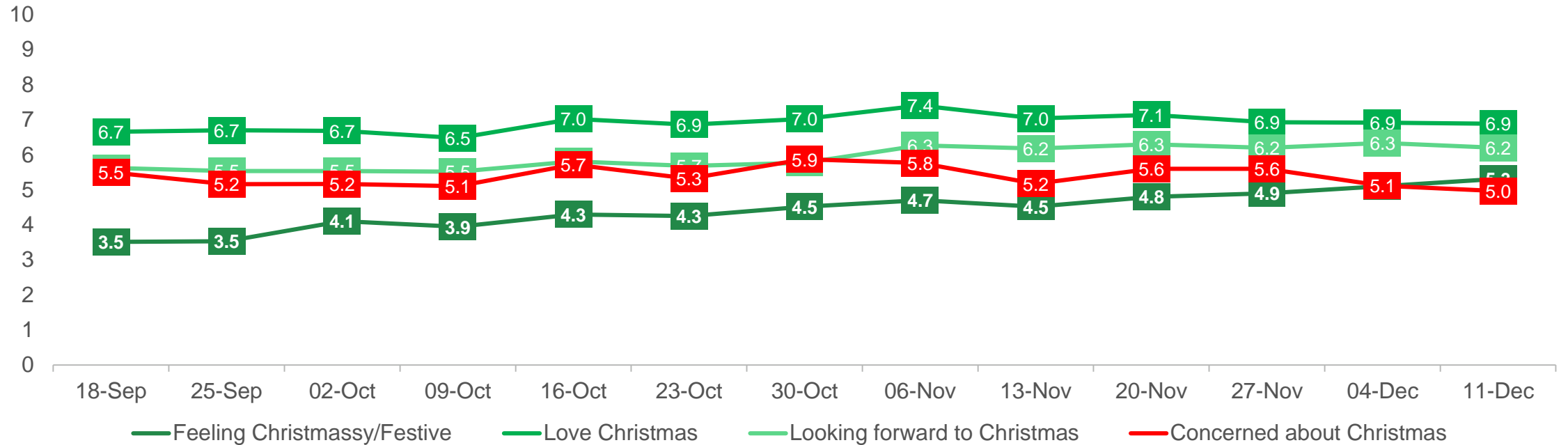
CHRISTMAS 2020

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 a rapidly changing landscape

As December progresses, people are continuing to feel more festive and less concerned about Christmas

The extent to which people love or hate Christmas and the extent to which they are looking forward to Christmas has plateaued, with minimal change in the last 5 weeks

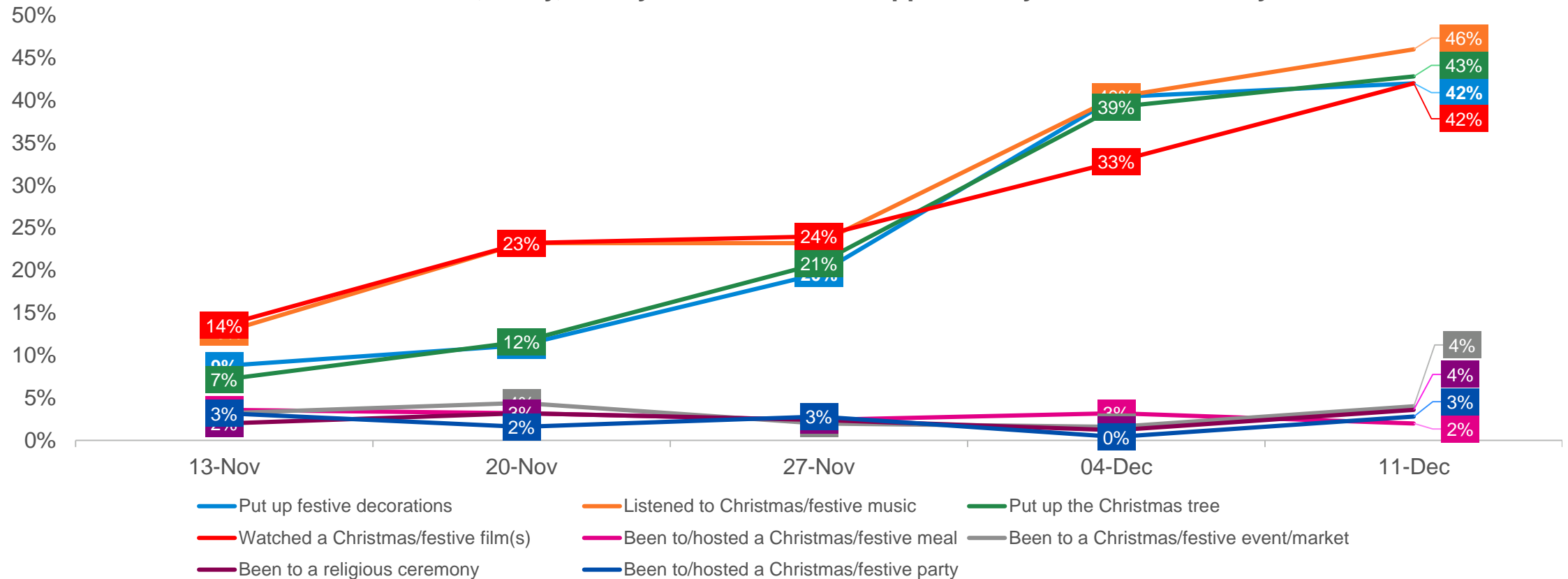
On the following scale please tell us how much you are...
(0=Not at all, 10=Completely)
MEAN SCORE



Christmas media consumption has increased this week, with more people watching Christmas films and listening to Christmas music

Undertaking out of home Christmas activities remained low this week, with 4% of people attending a Christmas/festive event/market

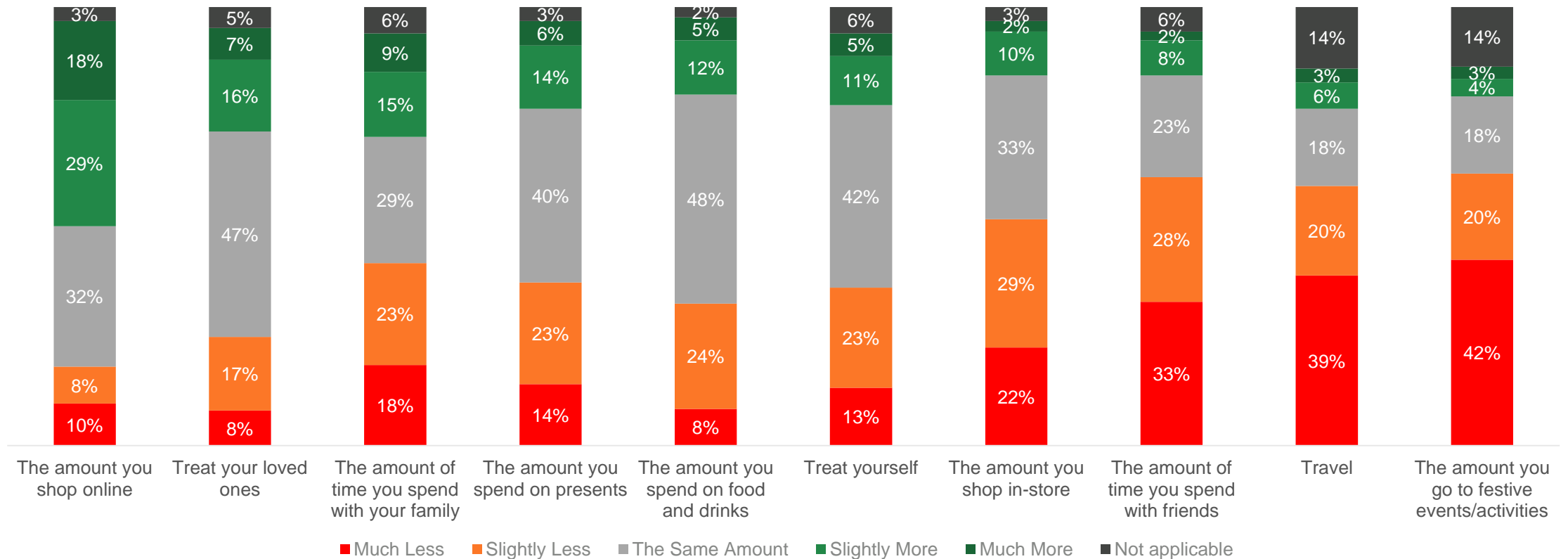
Which of the below, if any, have you done or have happened to you in the last 7 days?



Expected financial expenditure is lower this week - fewer people expect to treat loved ones more (-6ppts) or spend more on presents (-3ppts)

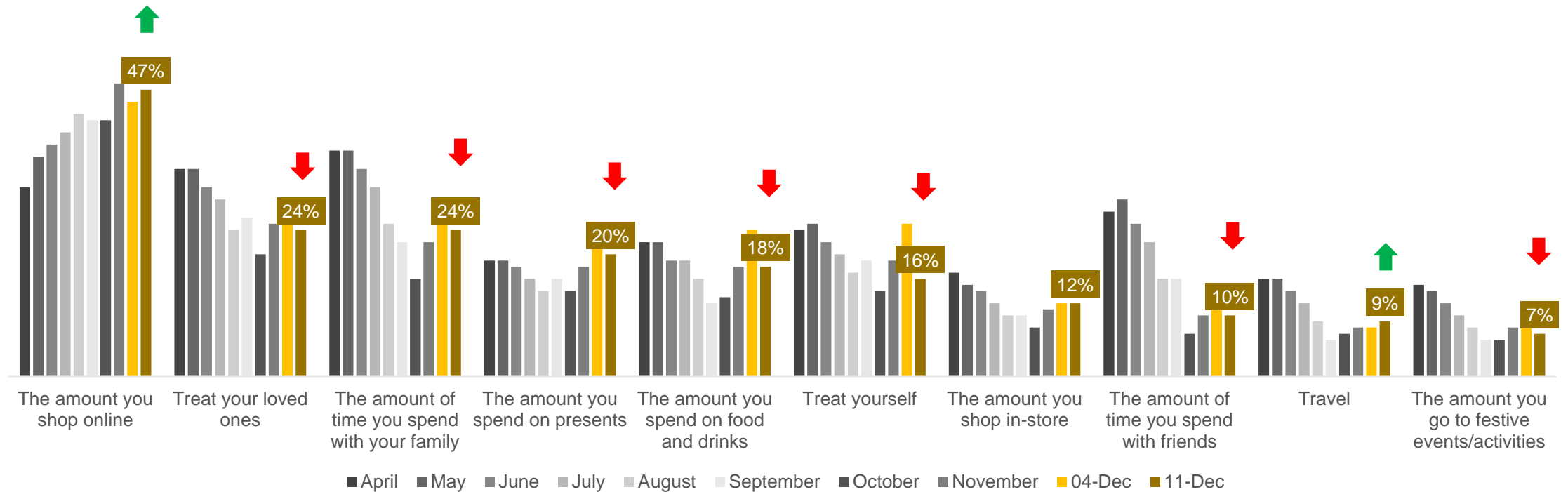
There has been a 9ppt increase in the percentage of people expecting to spend less on Christmas presents

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



After a short uplift as England left national lockdown, expectations to spend more time with loved ones has declined this week

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)



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, 13/11: 251, 20/11:250, 27/11:250, 04/12:250, 11/12:250

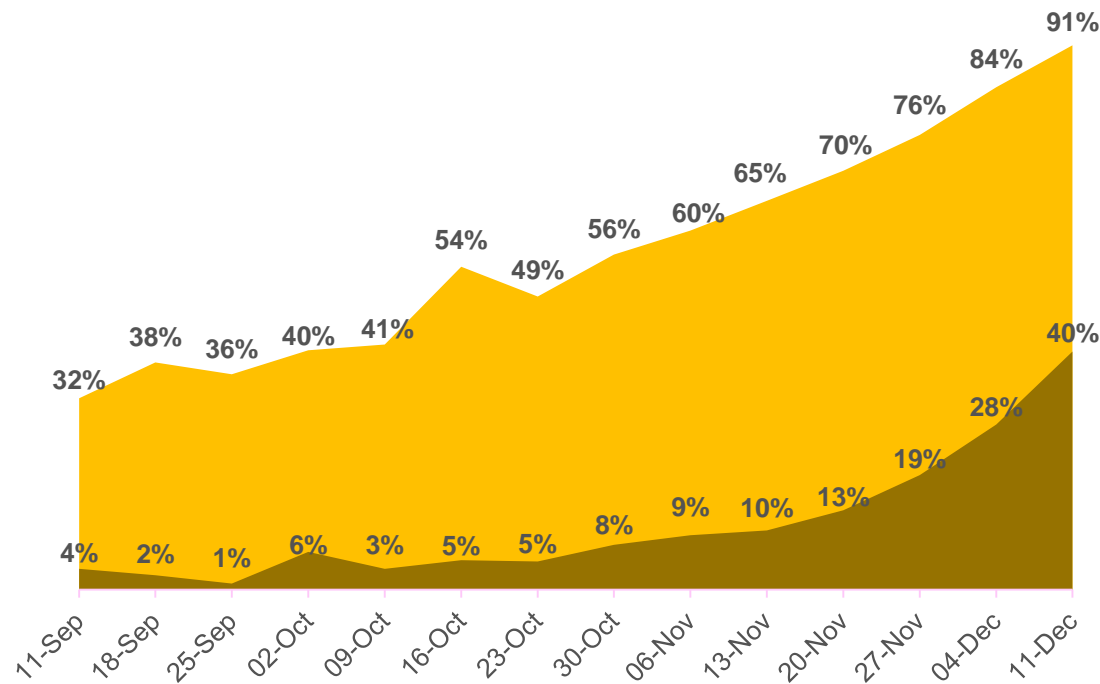


40% of Christmas shoppers have finished all their Christmas gift shopping

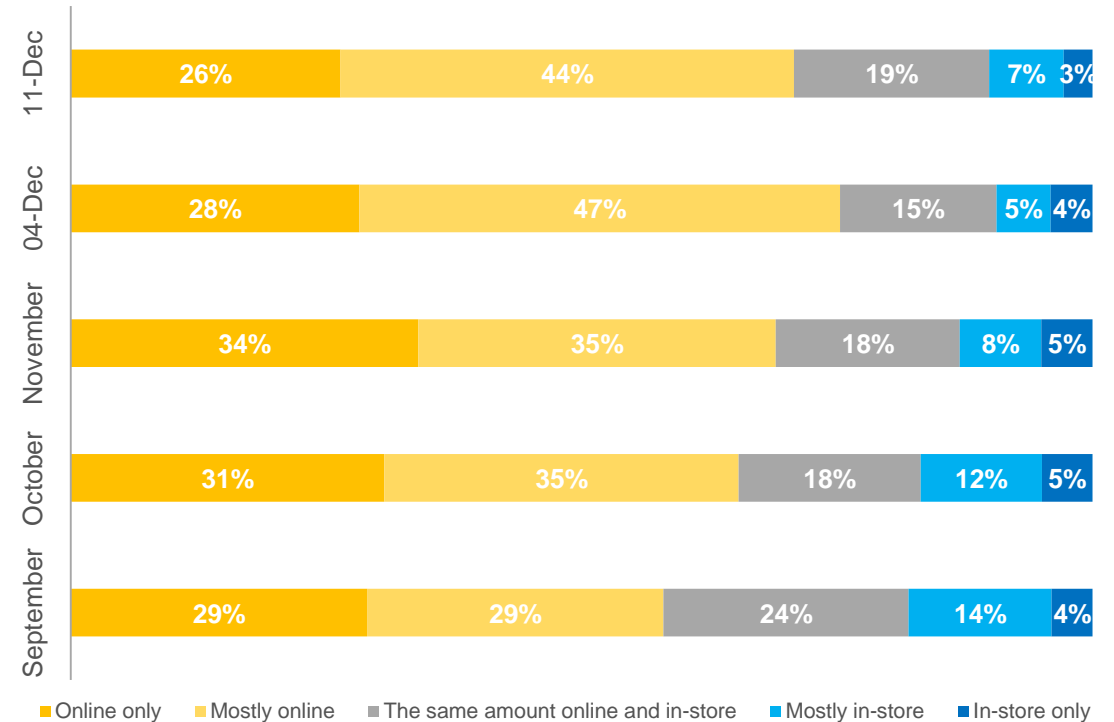
Online remains the primary method for Christmas present shopping

Christmas Gift Purchases *

- Purchased a Christmas present in 2020
- I have already done all of my Christmas gift shopping this year



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



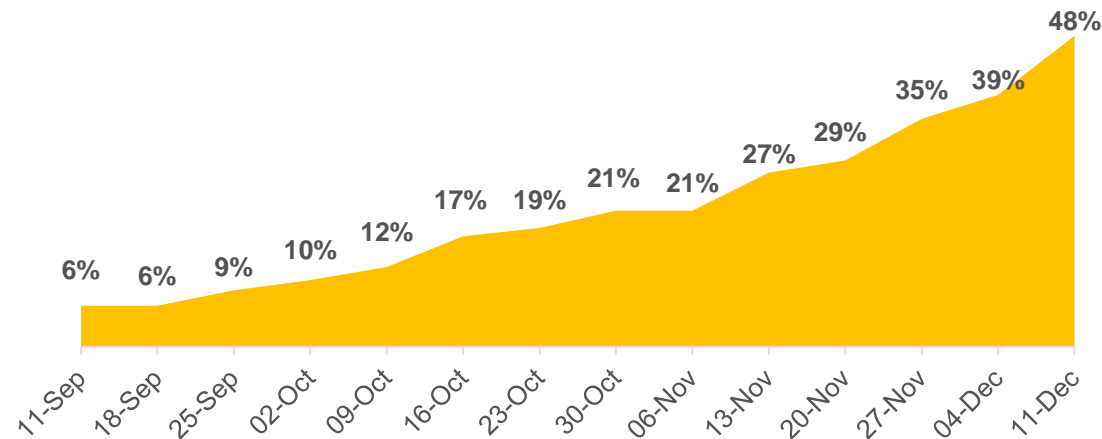
Source: OMD Radar Survey. *Give gifts at Christmas: 11/09:199, 18/09:208, 25/09:192, 02/10:206, 09/10:201, 16/10:202, 23/10:191, 30/10:200, 06/11:209, 13/11:192, 20/11:192, 27/11:188, 04/12:203, 11/12:196 |
 **Have purchased Christmas gifts in 2020: Sept (293), Oct (399), Nov (548), 04-Dec (170), 11-Dec (178)



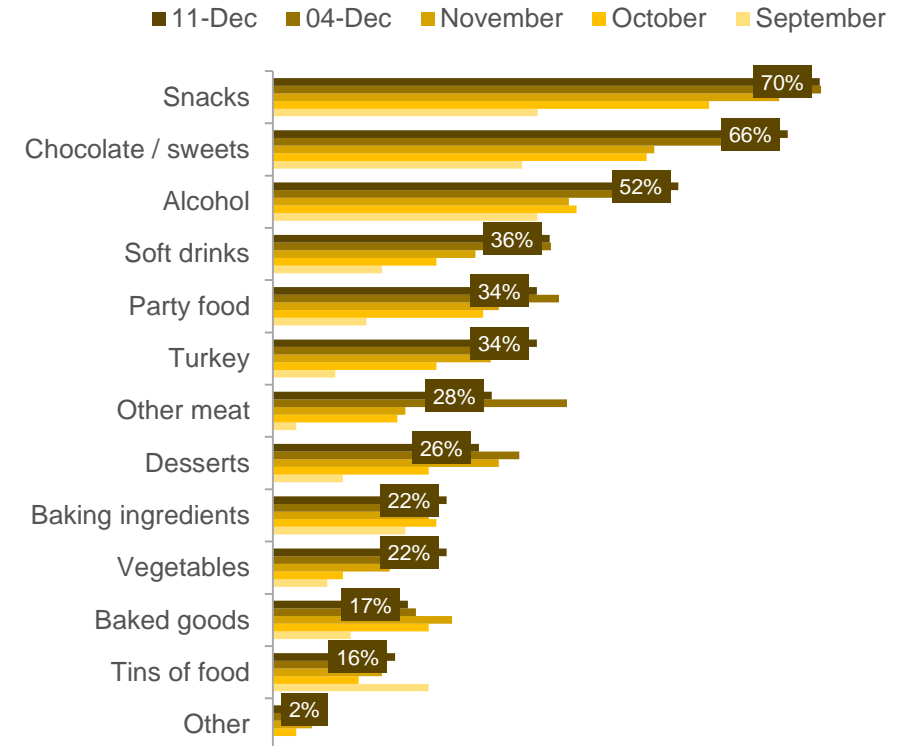
Almost half of the nation have purchased any groceries for Christmas, up 9ppts from last week

2 in 3 of those who have bought Christmas groceries have purchased chocolate/sweets

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? *



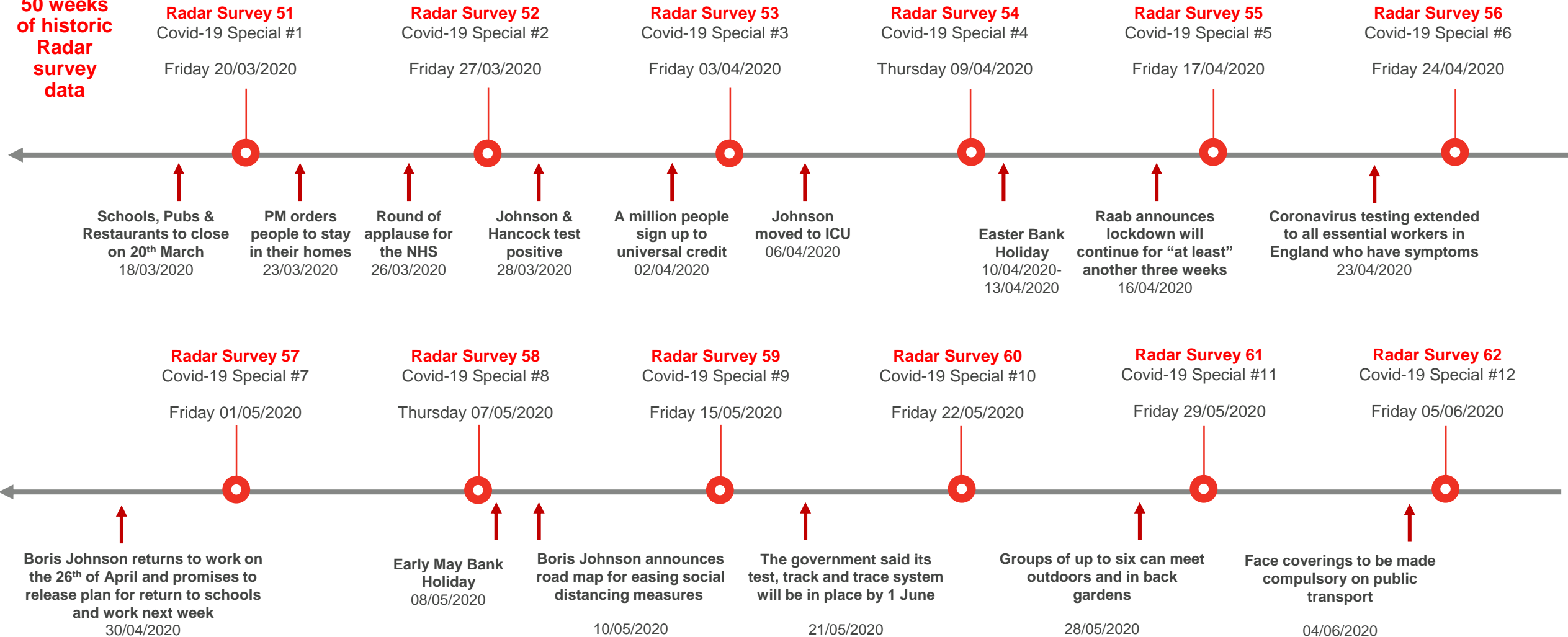
Source: OMD Radar Survey. .11/09:250, 18/09:250, 25/09:250, 02/10:250, 09/10:250, 16/10:250, 23/10: 254, 30/10: 250, 06/11:250, 13/11:251, 20/11:250, 27/11:250, 04/12:250, 11/12:250 | *Have purchased Christmas groceries in 2020: Sept (314), Oct (174), Nov (287), 04-Dec (98), 11-Dec (121)

Appendix



Survey Timeline

50 weeks
of historic
Radar
survey
data





Survey Timeline

62 weeks
of historic
Radar
survey
data

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



Non-essential
retailers reopen
15/06/2020

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



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

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



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



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

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



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

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



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



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

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



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

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



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



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

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



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



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



'Eat Out to Help
Out' ends for
most
restaurants

01/09/2020

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



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

09/09/2020

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



Revised government
restrictions on social
gatherings come into
place

14/09/2020

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



PM warns UK to
follow COVID
restrictions or risk
second lockdown

22/09/2020

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



Extended local
lockdown
measures in the
North East

01/10/2020

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



Boris to announce
tiered approach to
lockdown
measures

12/10/2020

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



London moved to
Tier 2 COVID alert
level

15/10/2020

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



Greater Manchester and
areas in the Midlands move
to Tier 3

20/10/1010-23/10/2020

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



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

31/10/2020

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



National lockdown in
England begins

05/11/2020

Radar Survey 85
Covid-19 Special #35
Friday 13/11/2020



News of potential COVID-19
vaccine by Pfizer available
by Spring 2021

09/11/2020

Radar Survey 86
Covid-19 Special #36
Friday 20/11/2020



England told to expect
tougher Covid rules to allow
for Christmas gatherings

18/11/2020



Survey Timeline

86 weeks
of historic
Radar
survey
data

Radar Survey 87
Covid-19 Special #37
Friday 27/11/2020

Radar Survey 88
Covid-19 Special #38
Friday 04/12/2020

Radar Survey 89
Covid-19 Special #39
Friday 11/12/2020

Black Friday
27/11/2020

**First NHS patient
receives COVID-19
vaccination**
08/12/2020

