

**COVID-19 Consumer Impact Report**  
w/c 27.07.20

**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 68 weeks, surveyed over 21,000 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 24th July to Sunday 26th July 2020.

# Summary: Confidence in the government and the future of Britain's economy declines amidst confusion over guidelines and financial woes

- 01 **Optimism** has seen a **5ppt decrease** WoW from **18%** to **13%**, the lowest level recorded since the start of the pandemic. **Happiness levels have also decreased** by **1ppt** **34%**.
  - 02 **Despite a slight increase in feelings of financial security** (from **32%** to **34%**) and there has been a **decline in confidence in future business conditions from 16% to 11%**, **to 11%**, 18 percentage points lower than pre-pandemic levels of 29%. This has led to a significant drop in consumer confidence (**-2.4 to -9.0**).
  - 03 **Confidence in the Government has plummeted** this week from **35%** to **29%** amid confusion over new guidelines.
  - 04 **Going out for dinner at a restaurant and going for drink at bar or pub has increased significantly** in the last week, both by 8 percentage points.
  - 05 Despite an increase in people who have gone on a day trip or weekend away (from 5% to 11%), there has been a decline in people thinking about/planning holidays (**-5ppts**) and a **decrease in intent to travel more** in the upcoming 12 months (**from 19% to 15%**)
  - 06 There have been significant increases in the number of people that already feel comfortable returning to a range of out of home activities. However, **many remain uncomfortable returning to public events or holidays abroad before a vaccine is widely available.**
-



**Life satisfaction,  
optimism & consumer  
confidence**



# Just 13% of people feel optimistic about the future of Britain, the lowest level recorded since the pandemic began



**Happiness** has decreased this week by 1ppts from 35% to 34%



**Optimism** has decreased 5ppts from 18% to 13%, the lowest level since the pandemic began.

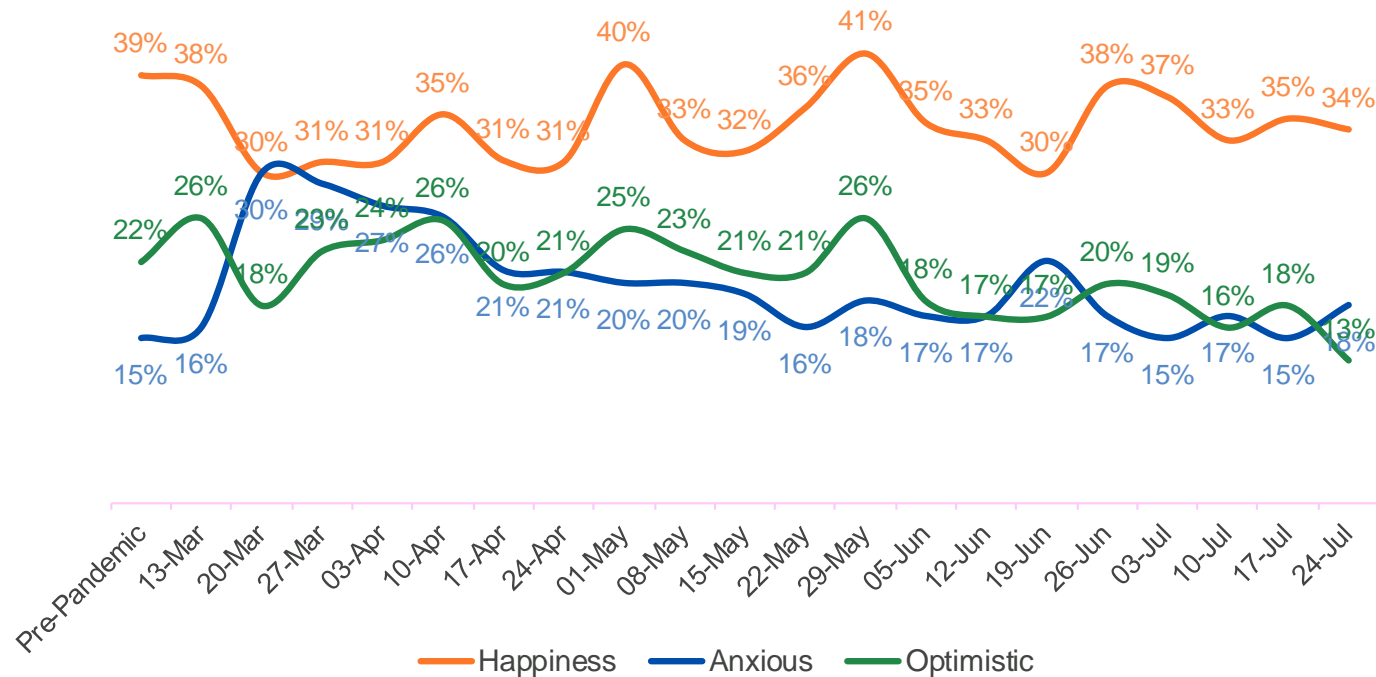


**Life satisfaction** has remained the same at 26%



**Anxiety levels** have increased this week, from 15% to 18%

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



# 11% are confident in future business conditions, the lowest level since the UK went into lockdown and 18ppts lower than pre-pandemic levels



**Feeling financially secure** has increased 2ppts from 32% to 34%.

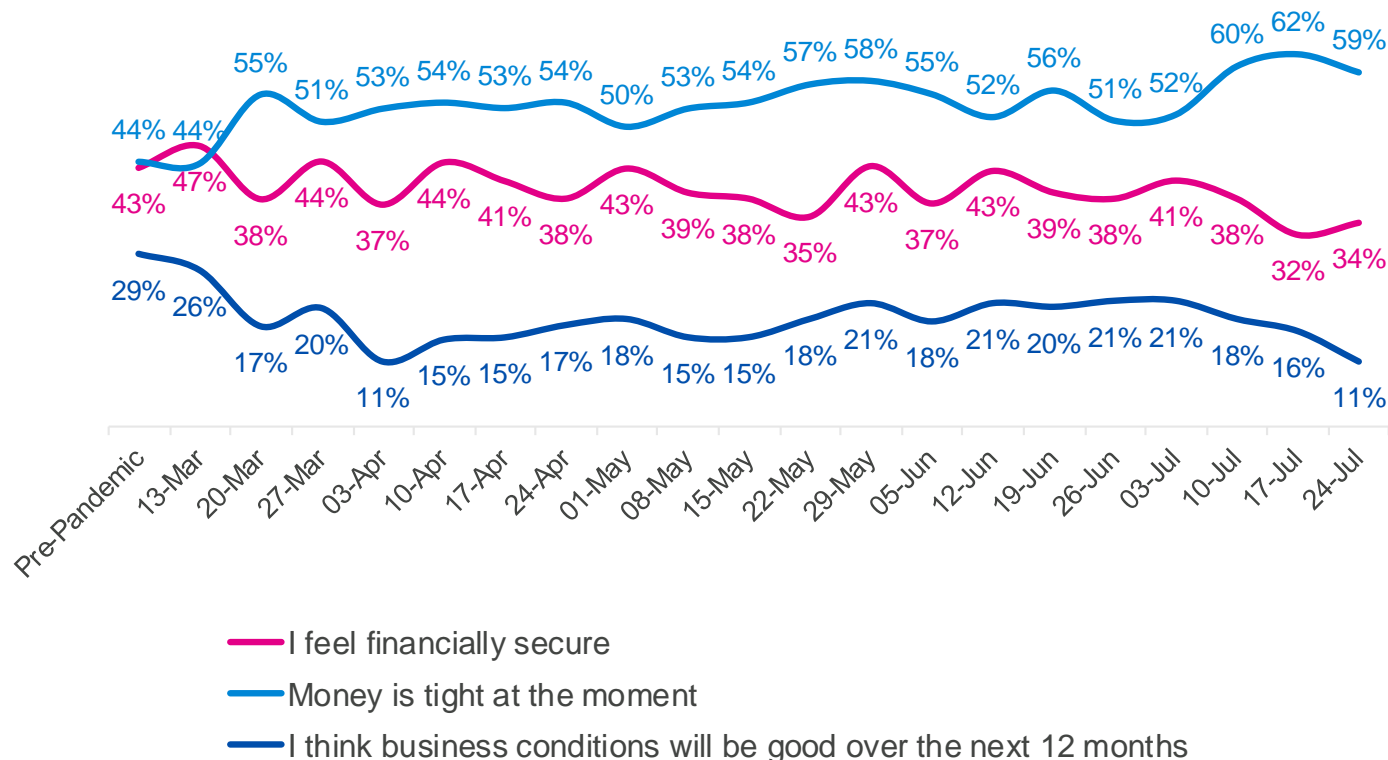


The number of people reporting that **money is tight** at the moment decreased this week by 3ppts from 62% to 59%.



**Confidence in future business conditions** has declined to 11%, 18 percentage points lower than pre-pandemic levels of 29%.

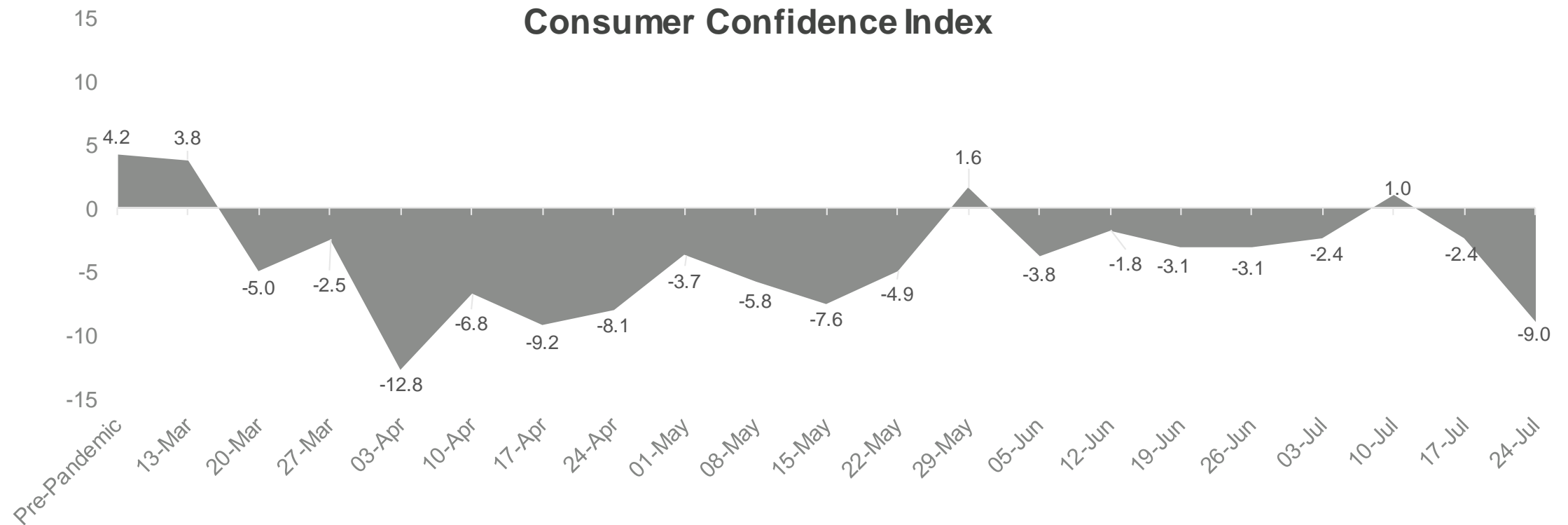
To what extent do you agree with the following statements?  
(0=Not at all, 10=Completely)  
% selecting top 3 (8-10)







# As optimism for the future of Britain and the economy diminishes, consumer confidence has dropped significantly this week



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.



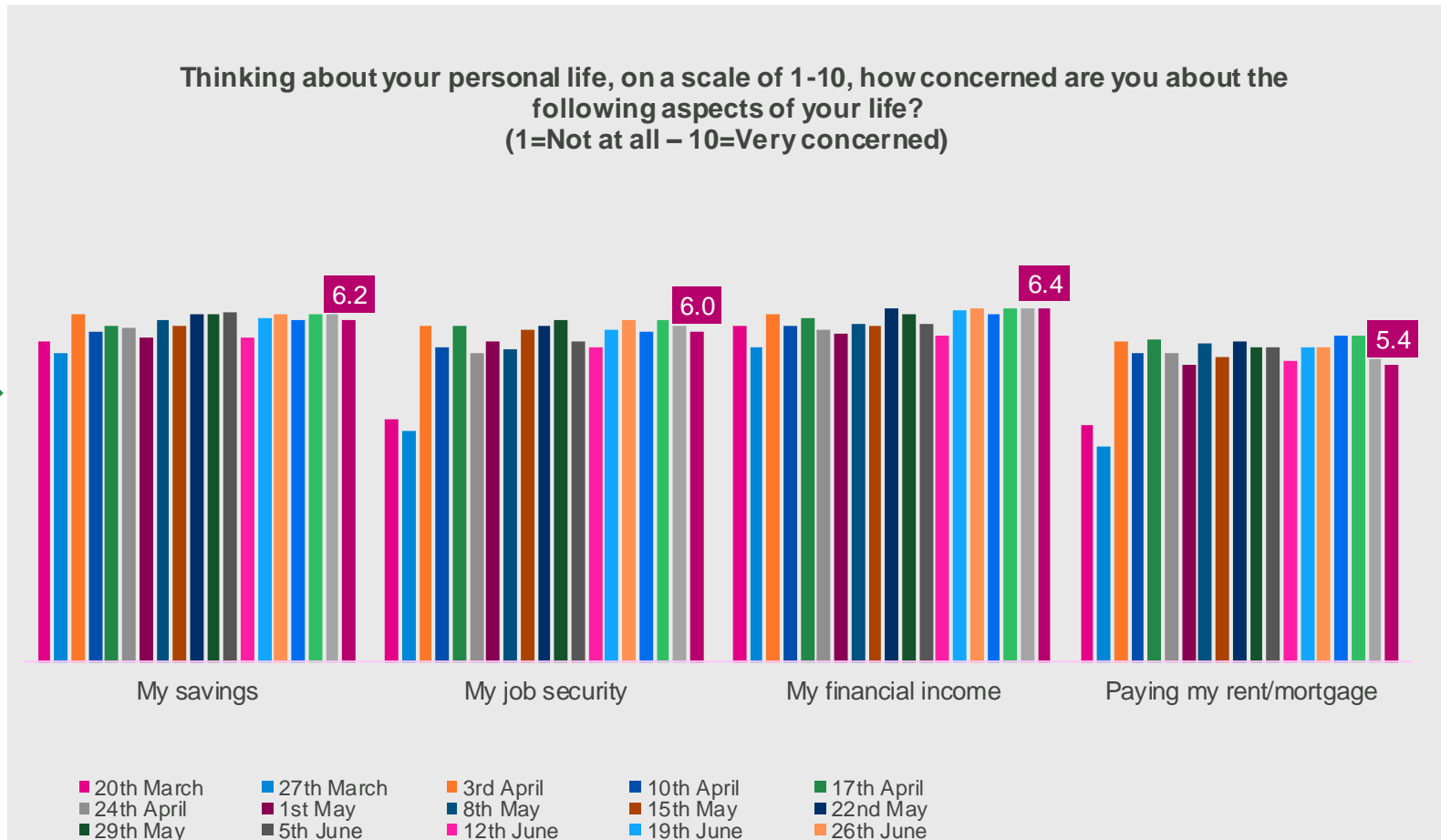
# Financial concerns have remained fairly stable this week, however the % of households that have someone furloughed has increased 6ppts

**23%** of households have someone that has been **furloughed**

**6%** of households contain someone that has had their **salary reduced** since the COVID-19 outbreak

**7%** of households include someone that has **been made redundant** since the COVID-19 outbreak began

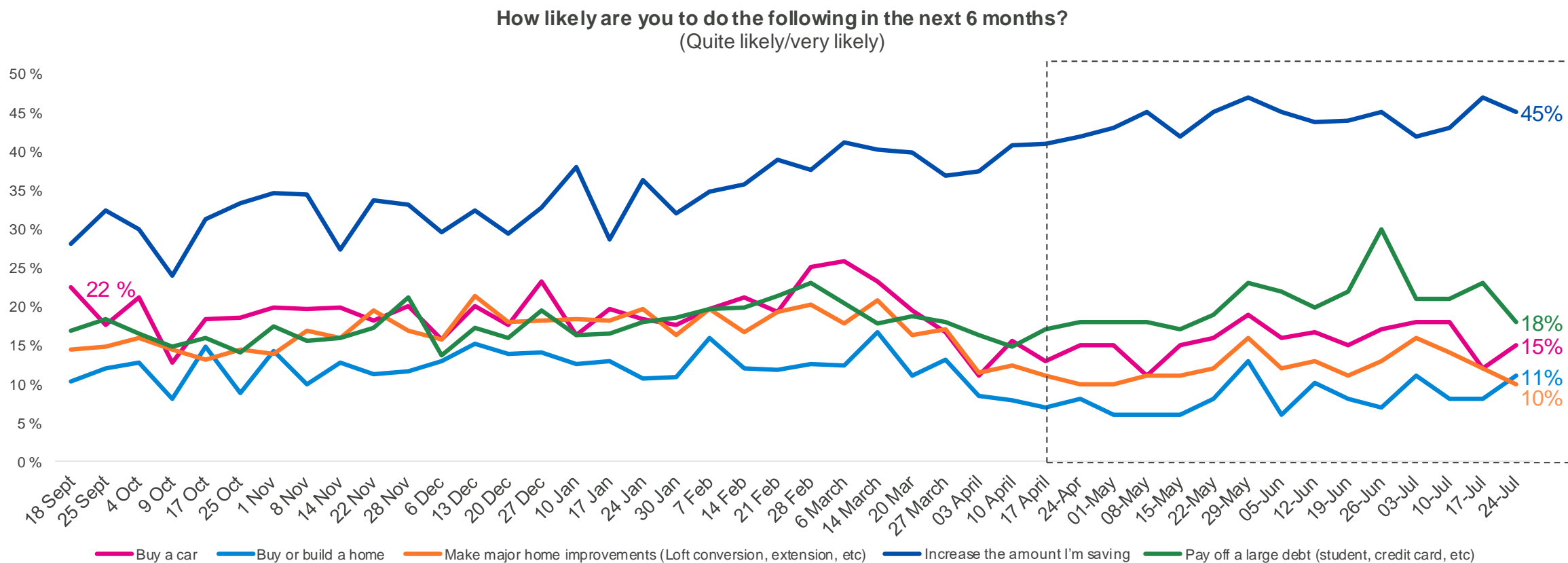
**53%** say that their employer has been **supportive** during the COVID-19 outbreak





# Plans to buy a car and buy/build a home have increased slightly this week, as intention to pay off debt continues to decline

After a spike last week, plans to increase savings has dropped to 45%, however this remains



Source: OMD Radar Survey. 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

# Confidence in Government & Broad Concerns



# Confidence in the Government has plummeted this week amid confusion over new guidelines

Confidence in the government is down, with people criticizing unclear and sometimes confusing guidelines

*“Because provisions were taken very late, and all the information that comes out seems so messy and confusing”*

*“They seem to be trying, but the government has so far given many contradictory and unclear instructions, which make it seem as if they are in fact not sure of what they are doing.”*

*“Information from the government is unclear at best”*

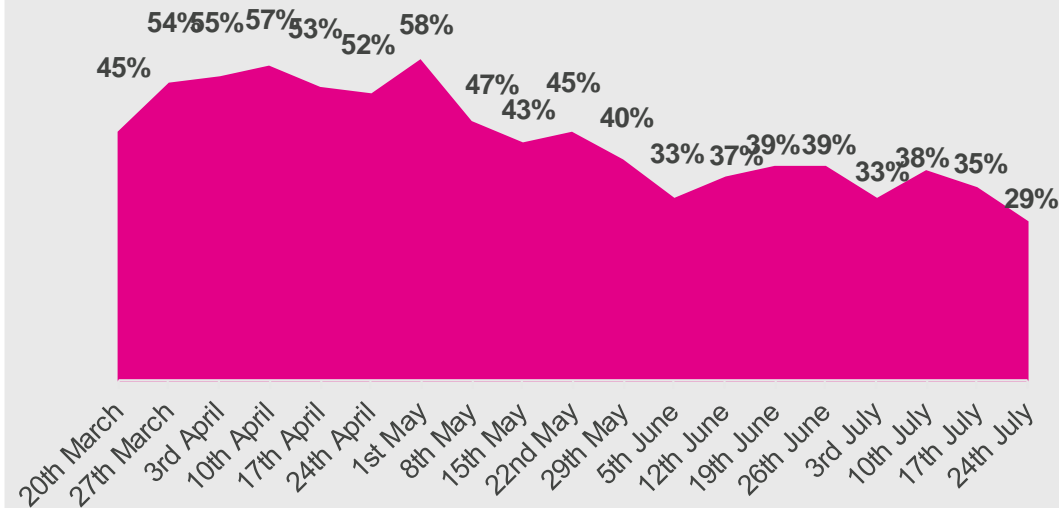
Many continue to condemn the government for opening pubs, bars and restaurants too soon after lockdown

*“The large number of deaths may be due to UK Government not taking action earlier. Also I believe that restrictions are being lifted too quickly.”*

*“The UK government has been rushing coming out of lockdown and has focussed too much on restarting the economy. Their messages have also been unclear whereas the Scottish govt have been much clearer.”*

*“They have gone against science advice and ended lockdown too soon.”*

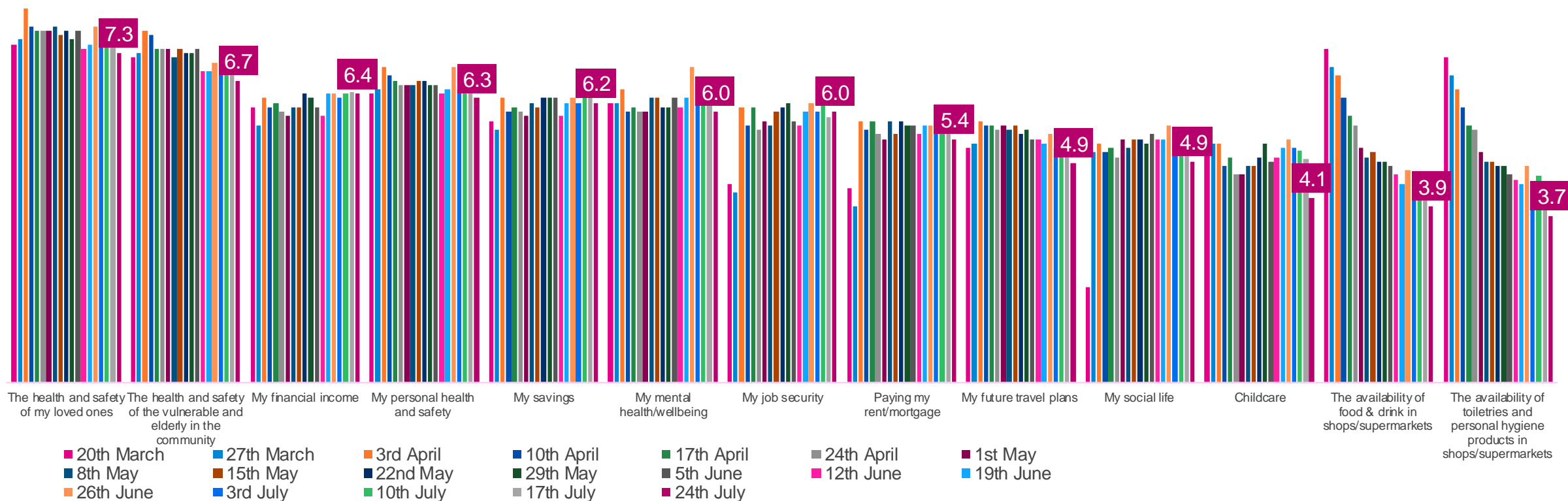
How confident are you in the government’s response to the COVID-19 outbreak?  
(% Confident)





# Concerns across all areas affecting people's personal life have declined with the exception of job security

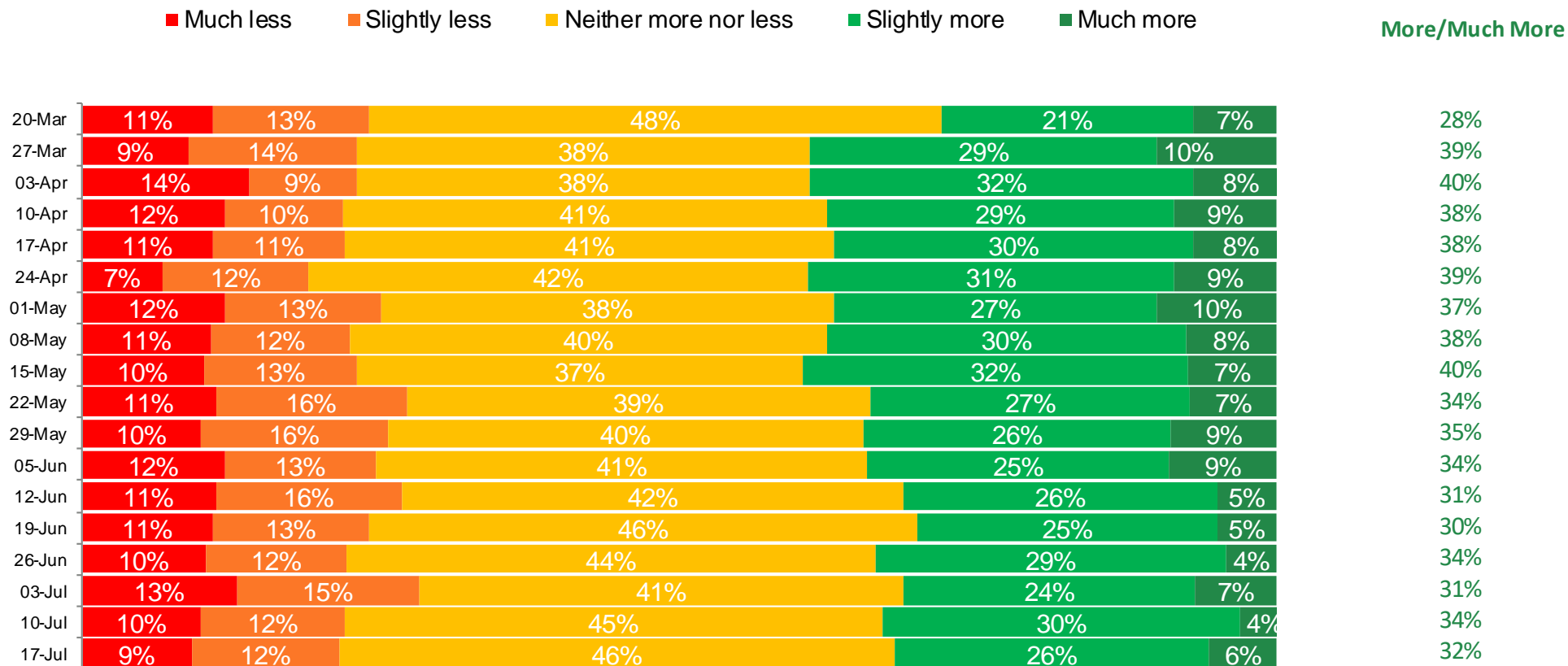
Thinking about your personal life, on a scale of 1-10, how concerned are you about the following aspects of your life?  
(1=Not at all – 10=Very concerned)





# A third of people still feel more connected to their community compared to before the COVID-19 outbreak, demonstrating the lasting effect

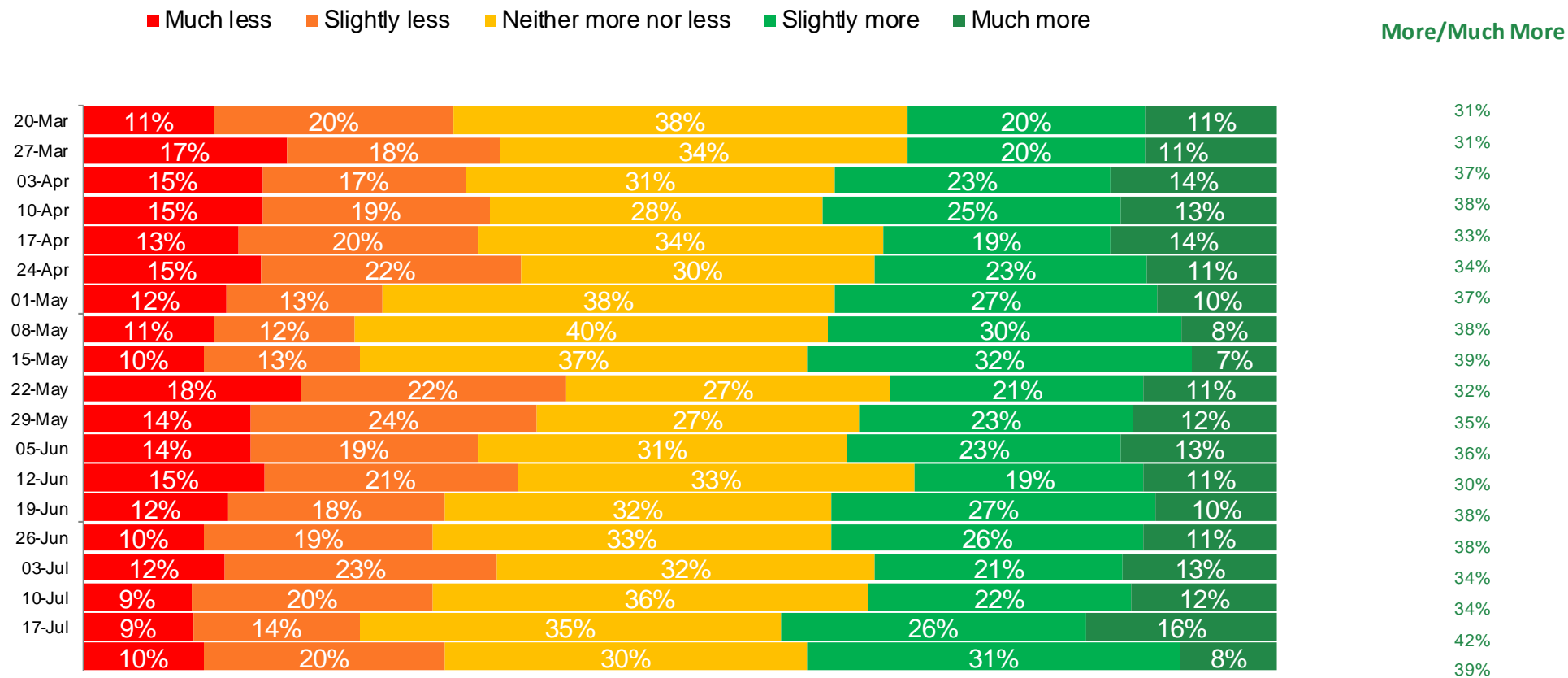
To what extent do you feel more or less connected to your community compared to before the COVID-19 outbreak?





# Feeling more connected to your friends/family in the last 7 days has decreased slightly this week

To what extent do you feel more or less connected to your friends / family compared to before the COVID-19 outbreak?

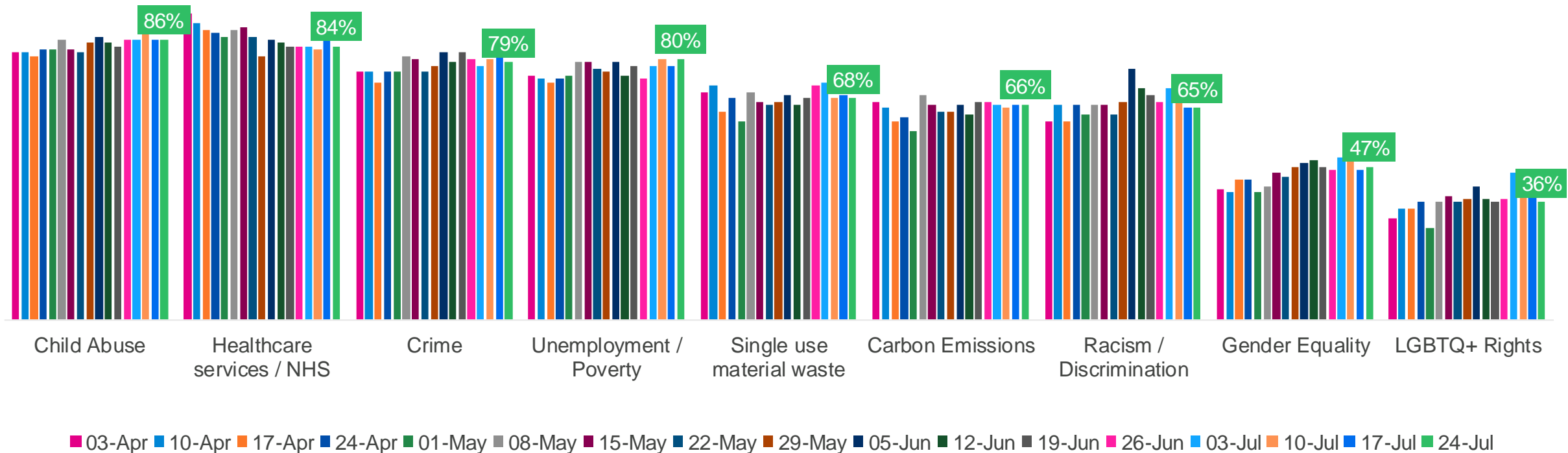






# Concern over crime has decreased this week, after a peak in levels last week, whilst concern over unemployment/poverty has increased

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



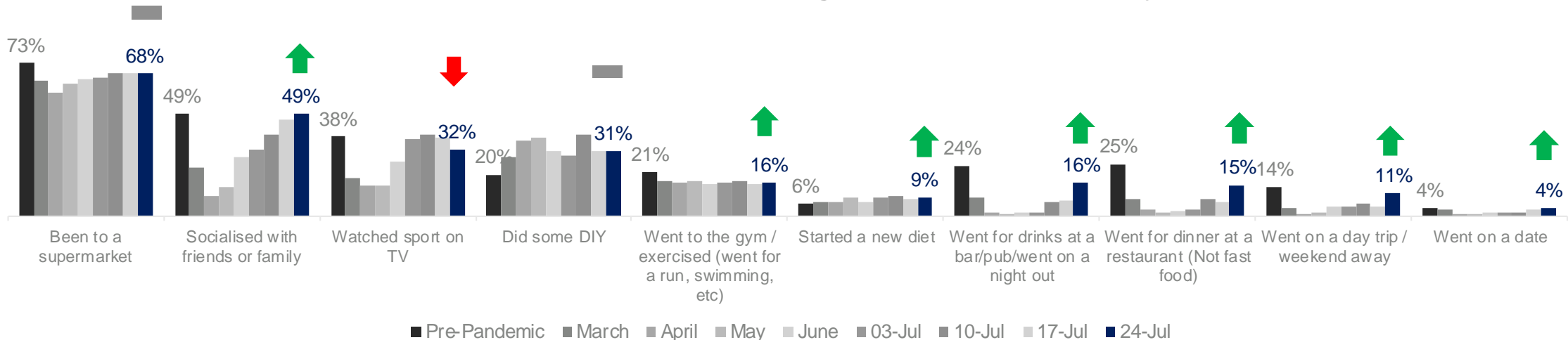
# Changes in Behaviour



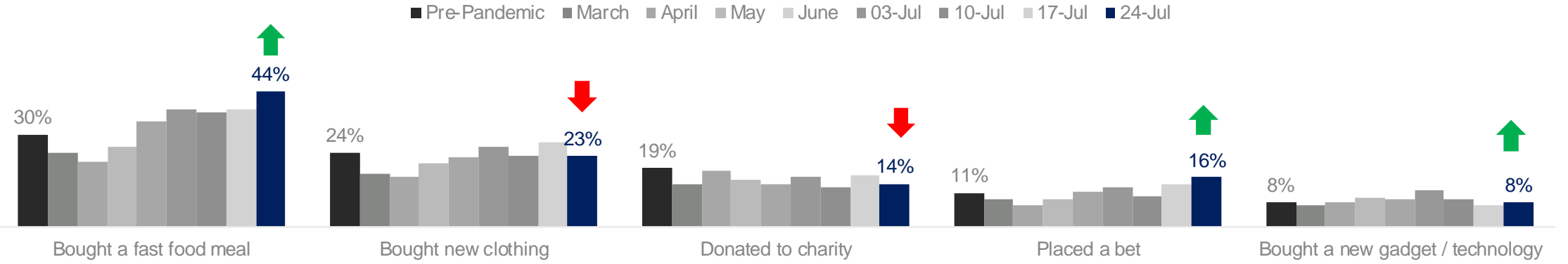
# Going out for dinner at a restaurant and going for drink at bar or pub has increased significantly in the last week, both by 8 percentage points

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

What they're doing



What they're buying

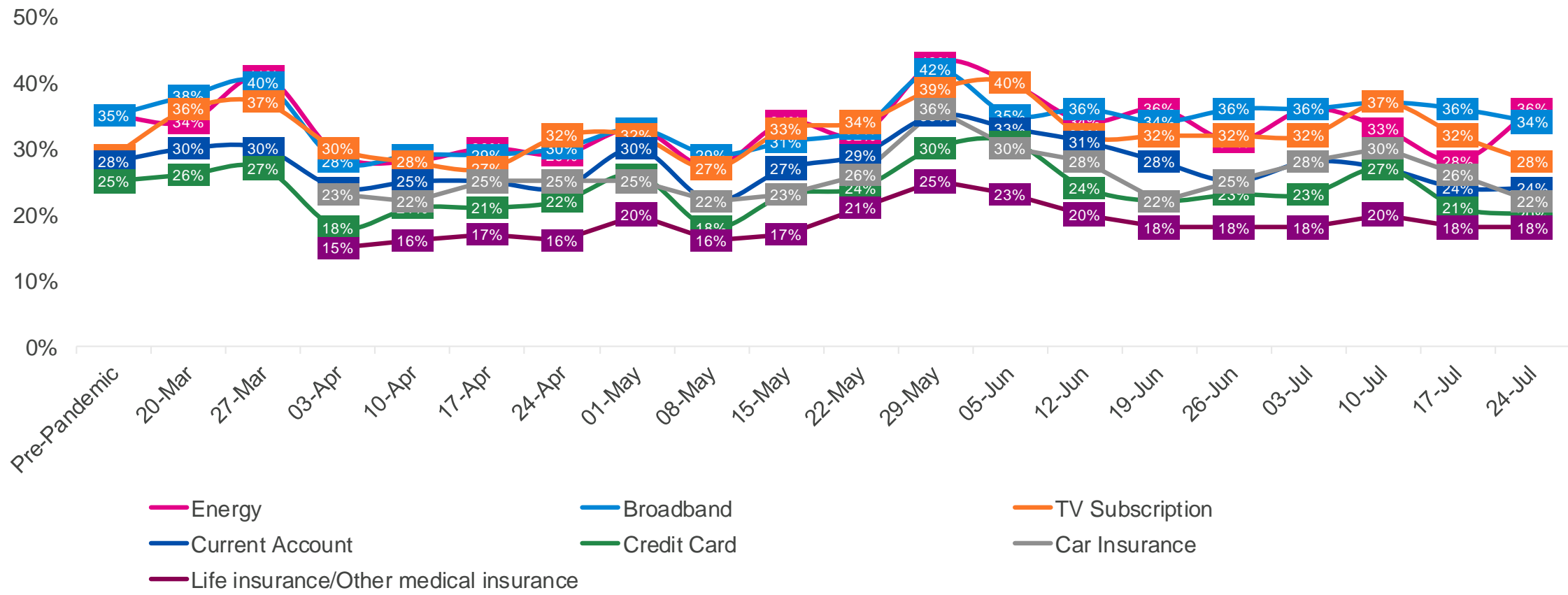


Source: OMD Radar Survey. Pre-Pandemic: 12,076, March: 1,716, April: 2,000, 08-May: 500, 15-May: 500, 22-May: 500, 29-May: 500, 05-June:500, 12-June:500, 19-June: 500, 26-June: 500, 03-July:500, 10-July:500, 17-July:250, 24-July:250



# WoW fewer people took interest in or action on switching their subscriptions and suppliers for all tracked behaviours

Have you talked about, researched, bought any of the following in the past 4 weeks?  
*Any interest or action*



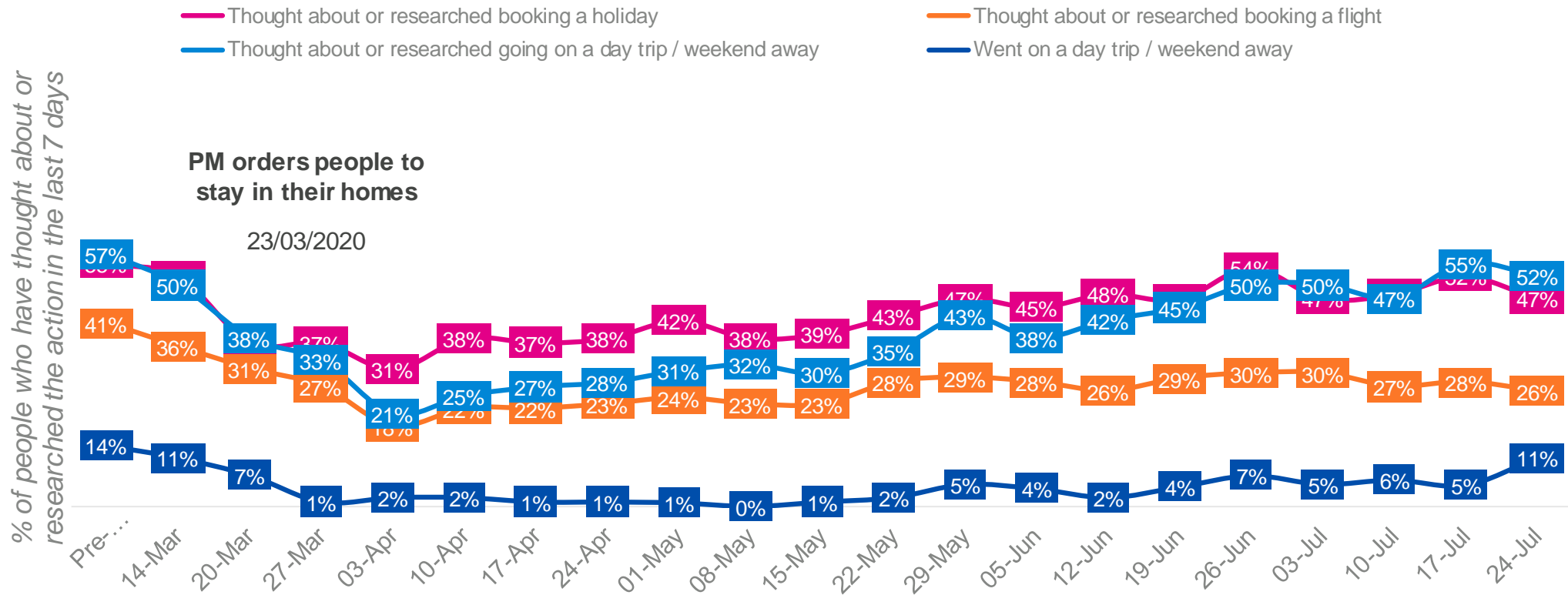
Pre Pandemic - data from 18 Sept 2019 - 6 March 2020. n=5888.

Post Pandemic = 20/03: 488, 27/03: 480, 03/04: 503, 10/03: 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



# Thinking about or researching booking a holiday has decreased this week, however the % who went on a day trip/weekend increased 6ppts

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

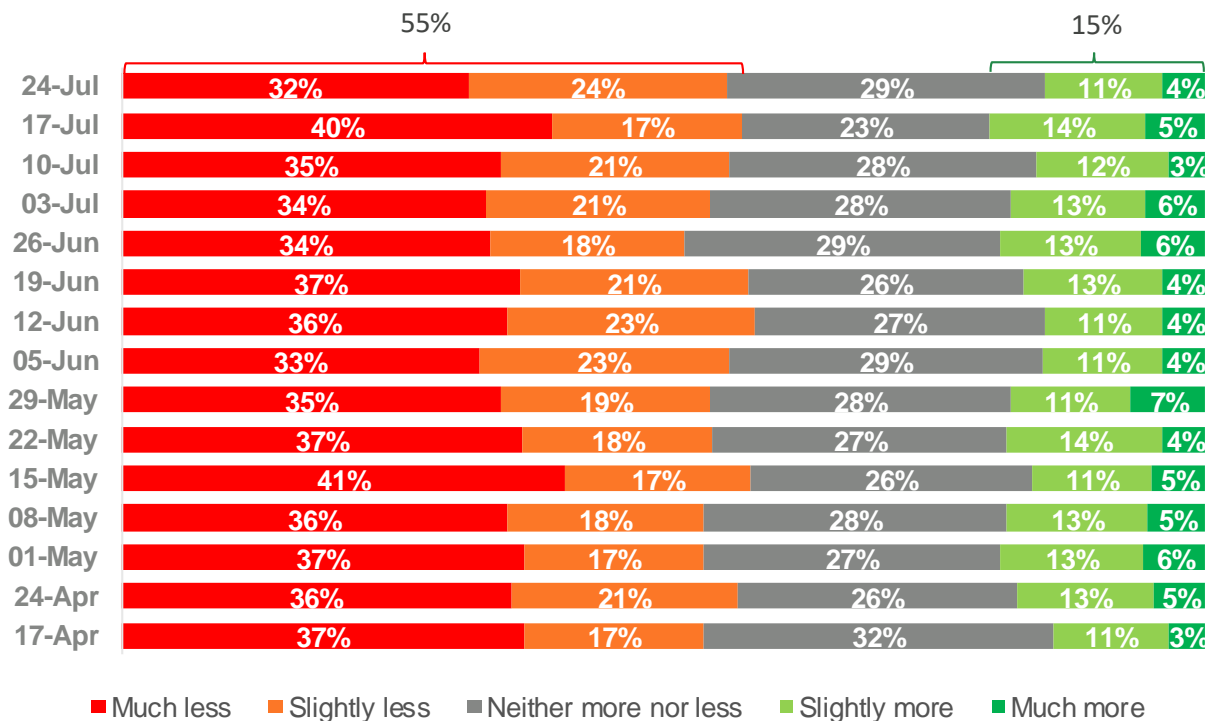




# After a positive shift in holiday intent last week the number of people intending to take more holiday has declined this week

Uncertainty remains, particularly around how other countries will handle tourism and COVID-19, but some people remain keen to pick their holiday plans back up

Thinking about your holiday plans over the next 12 months, are you planning on taking MORE or LESS compared to the previous 12 months?



“I wouldn't feel safe getting on an airplane with lots of other people”

“There's too many restrictions ruining any experience I might have”

“Not feeling completely comfortable yet about making travel plans in case of a second outbreak.”

“I see no reason to change from a normal year unless we are unable to go on trips which may be cancelled”

“I don't know what the Covid situation will be so it's hard to plan”

“I had four trips planned between April 2020 - June 2021. three of which have been or will be affected by the virus. the remaining one, we are hoping will still go ahead..”



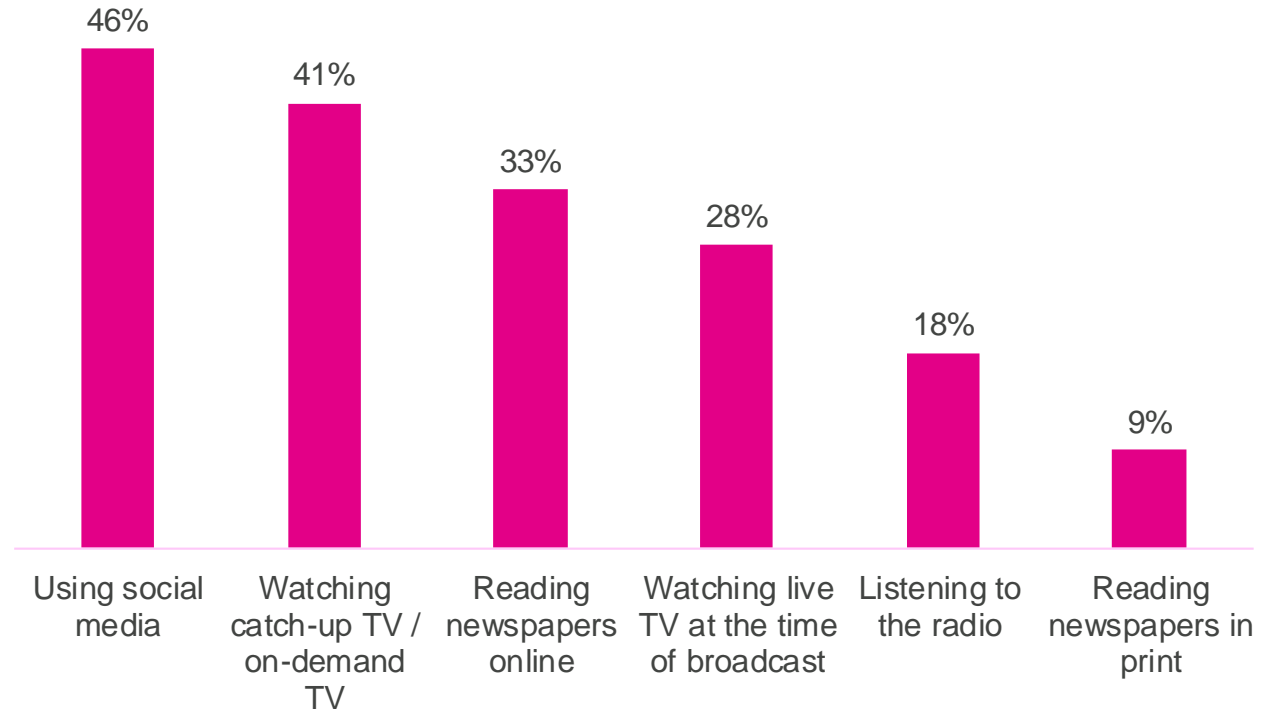
# Changes in Media Consumption

(claimed, sample = 250; this data should be used alongside industry gold-standard reporting, e.g. BARB, where available)

# Media consumption has declined across channels the past 7 days, with fewer people watching catch-up TV, listening to the radio, using social media, reading print or online news more than last week

- ↓ **46%** say they are consuming social media more than before the pandemic, down 2ppts since last week.
- ↓ **33%** say they are consuming more newspaper articles or stories online/on a device, down from **36%** last week.
- ↓ Reading newspapers in print has decreased a lot in the last 7 days with **9%** claiming to be reading more during COVID-19, down 5ppt from last week.
- ↓ **18%** say they are consuming more radio during lockdown, 10ppt lower than last week.
- Consuming more live TV at the time of broadcast is unchanged from last week, with **28%** claiming to be consuming more.
- ↓ Watching more catch-up or on-demand TV has declined by 2ppt in the last 7 days – with **41%** watching more catch-up TV.

Now thinking about your media consumption in the past 7 days, how have you changed the below behaviours since before the COVID-19 outbreak?  
(NET slightly more / much more)



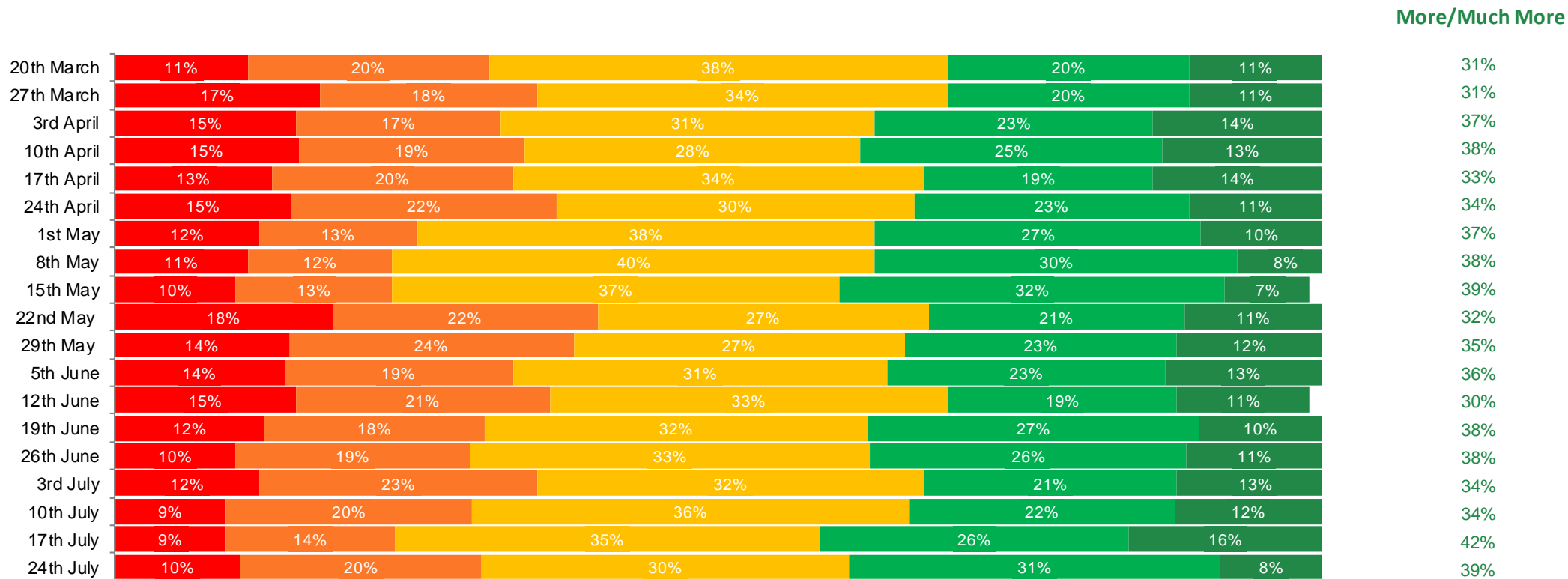




# Feeling connected has seen a decline this week, with fewer people feeling more connected to their friends / family

To what extent do you feel more or less connected to your friends / family compared to before the COVID-19 outbreak?

■ Much less      ■ Slightly less      ■ Neither more nor less      ■ Slightly more      ■ Much more

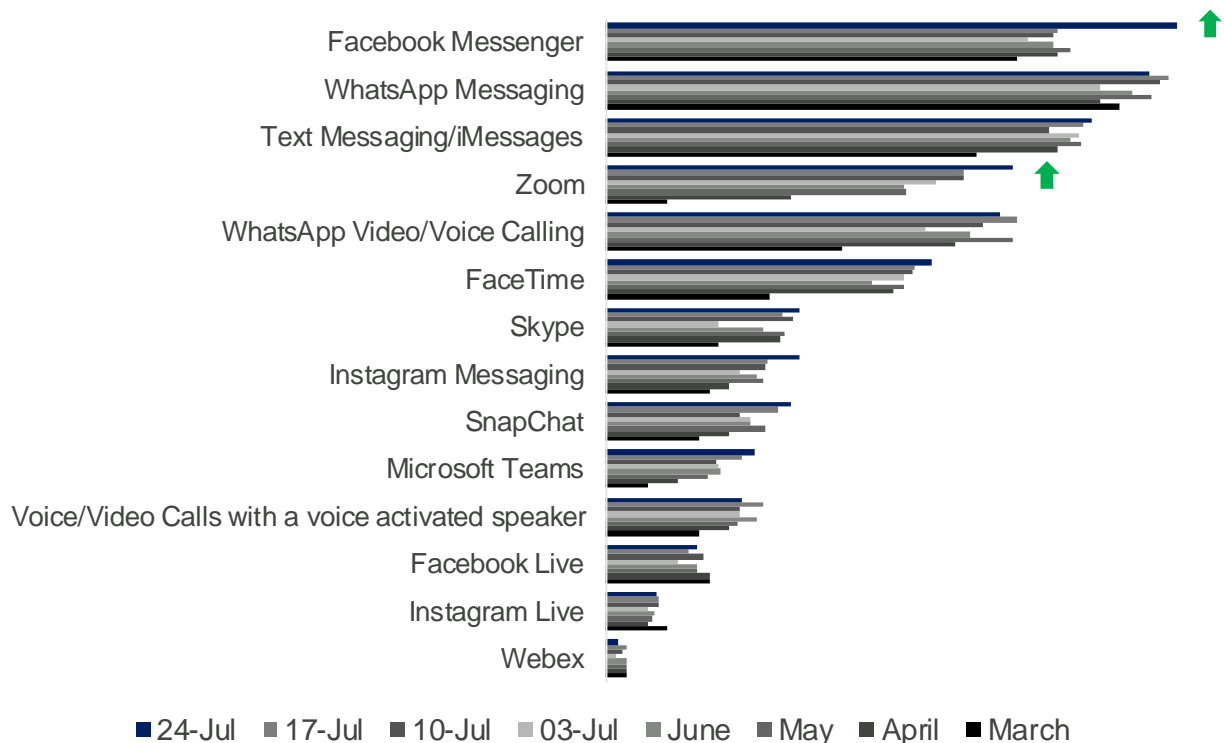




# Virtual group exercises saw a notable uplift after a dip last week, while quizzing remains popular

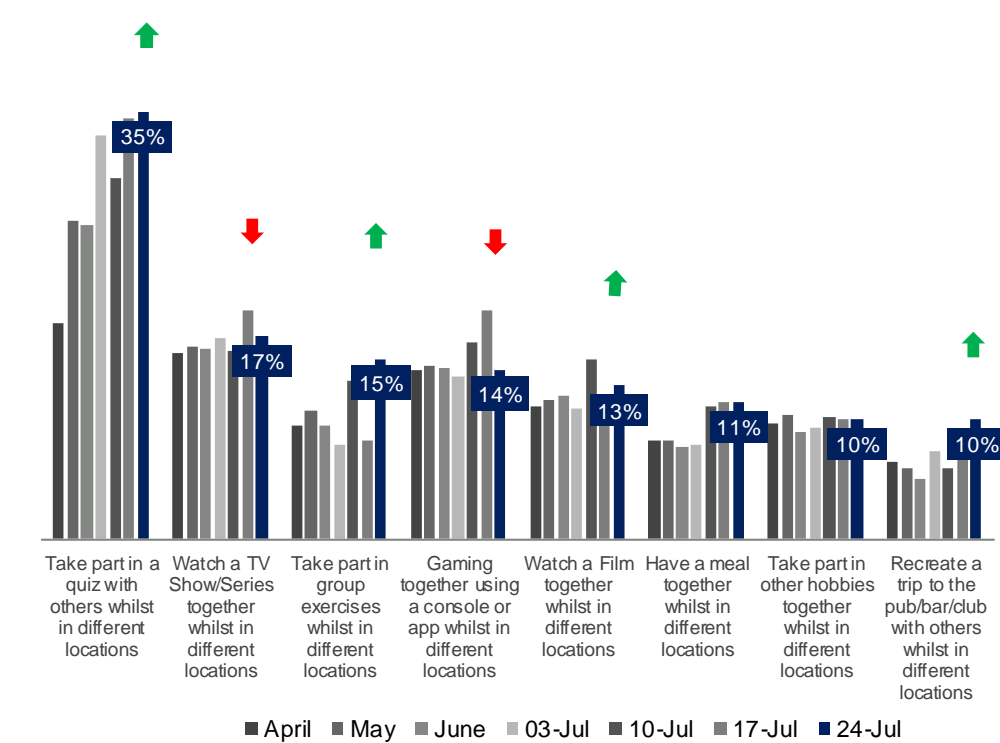
Use of communication services increased across most platforms in the last 7 days

Have you been using any technology services to stay in touch with others during the COVID-19 outbreak?



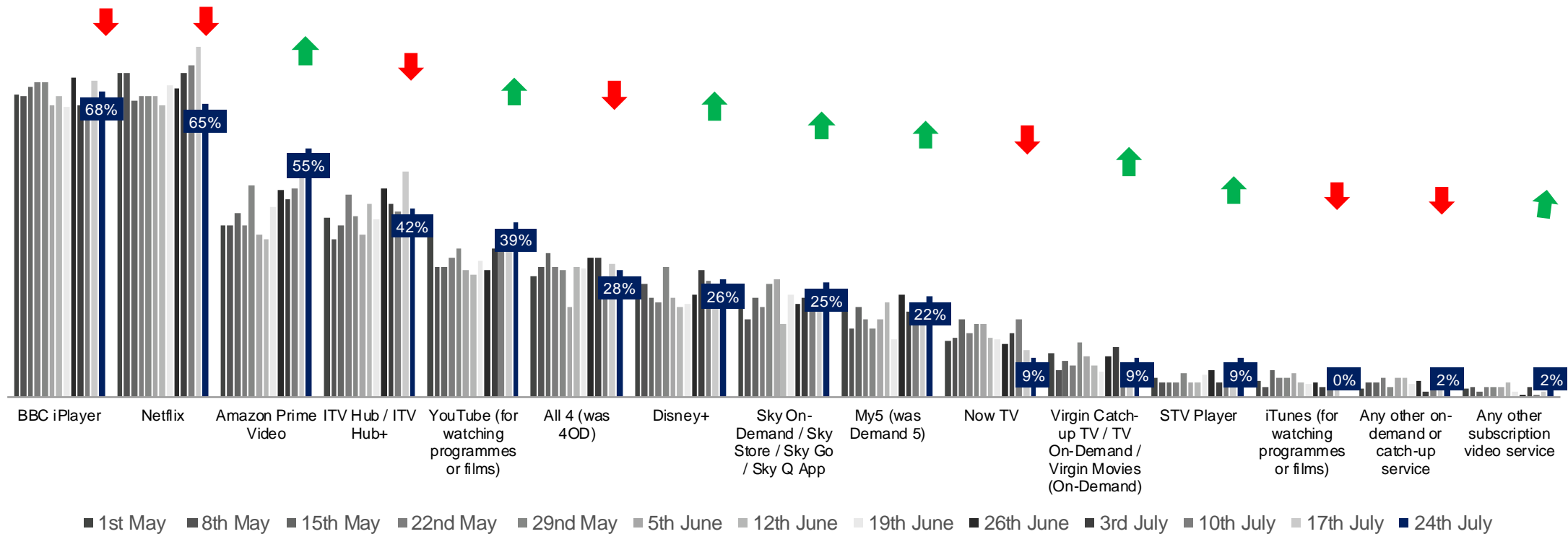
With pubs now available, the number of people creating virtual pub trips decreased

Which, if any of the below occasions have you used technology to do?



# Broadcast VOD services experienced dips in the volume of viewers consuming more than they used to, whereas Netflix and Amazon Prime Video saw increases in the last 7 days

Which of the below catch-up TV or on-demand TV/video services have you been watching more of?

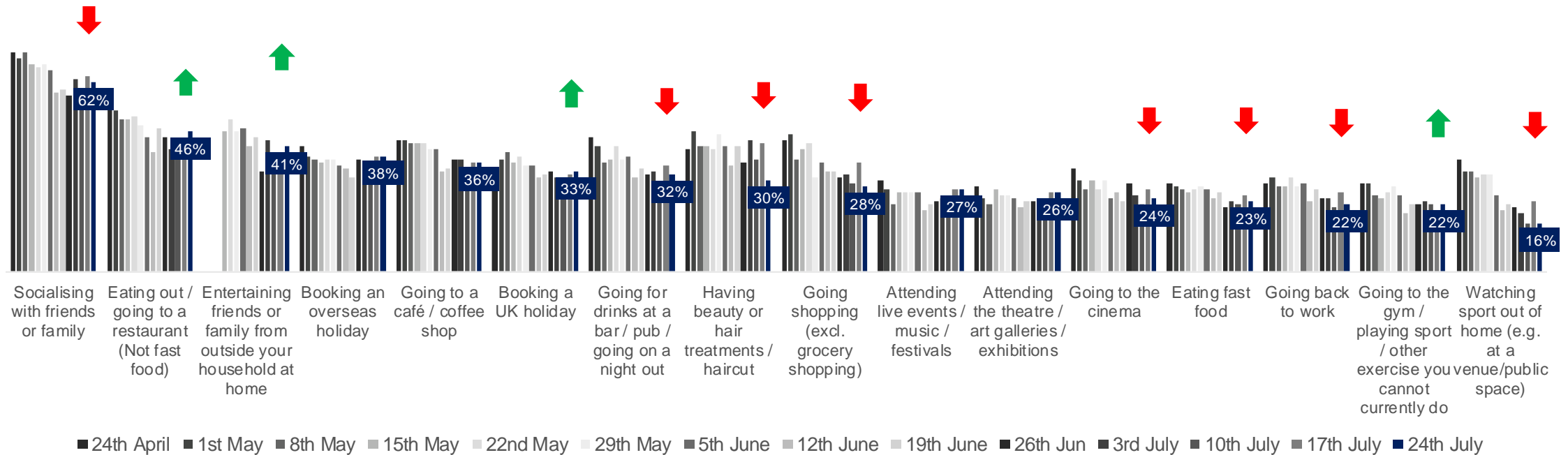




**Looking ahead**

# Anticipation for activities that have been recently reintroduced has declined and anticipation to watch sport has declined alongside the conclusion of the Premier League season

To what extent, if at all, are you looking forward to the following activities when the current travel confinement/lockdown is over?  
(A fair amount / a lot)

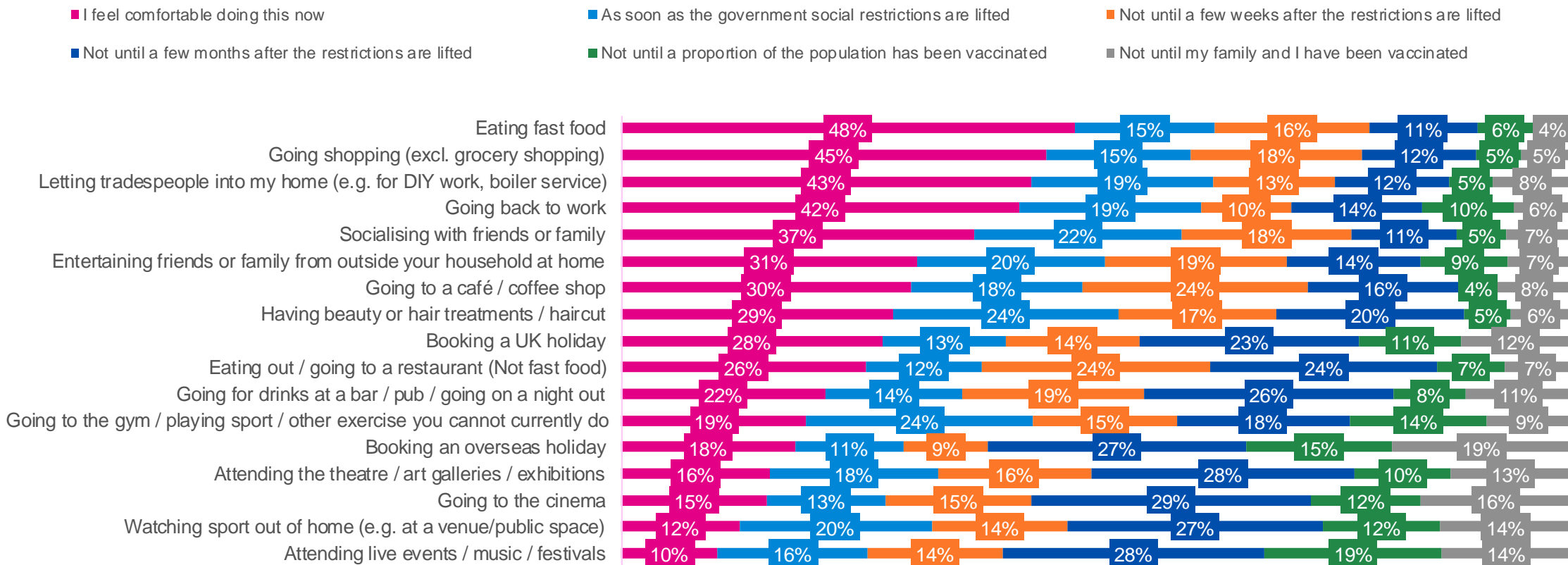




# There have been significant increases in the number of people that already feel comfortable returning to out of home activities

There has been a 17ppt increase in people feeling comfortable returning to work, a 12ppt increase in people feeling comfortable booking a UK holiday and a 9ppt increase for booking an overseas holiday

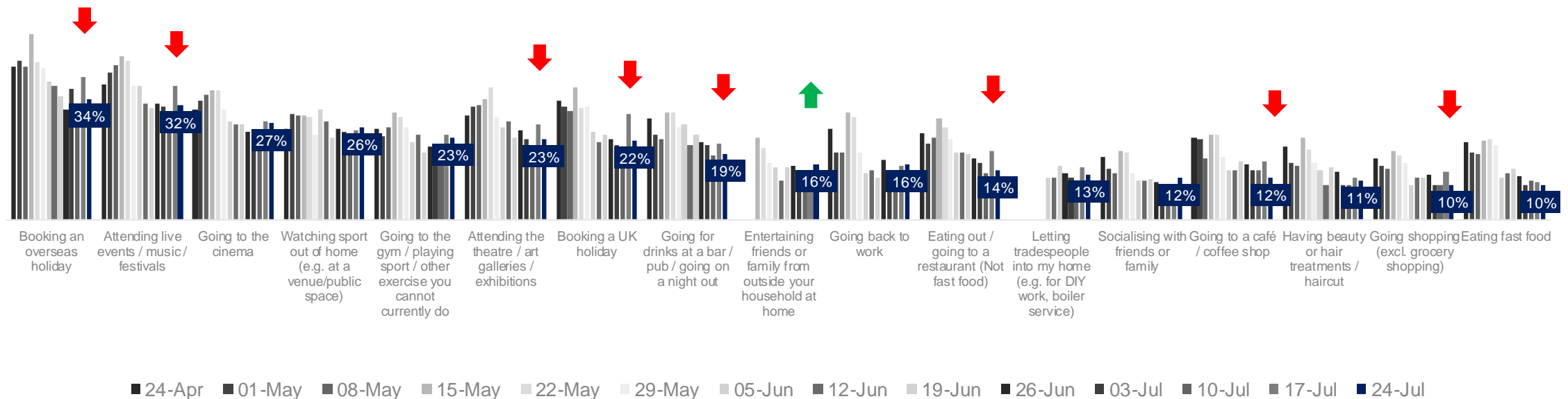
## When would you feel comfortable doing the following again?



# Fewer people do not feel comfortable booking holidays, both domestically and abroad, before a vaccine is available

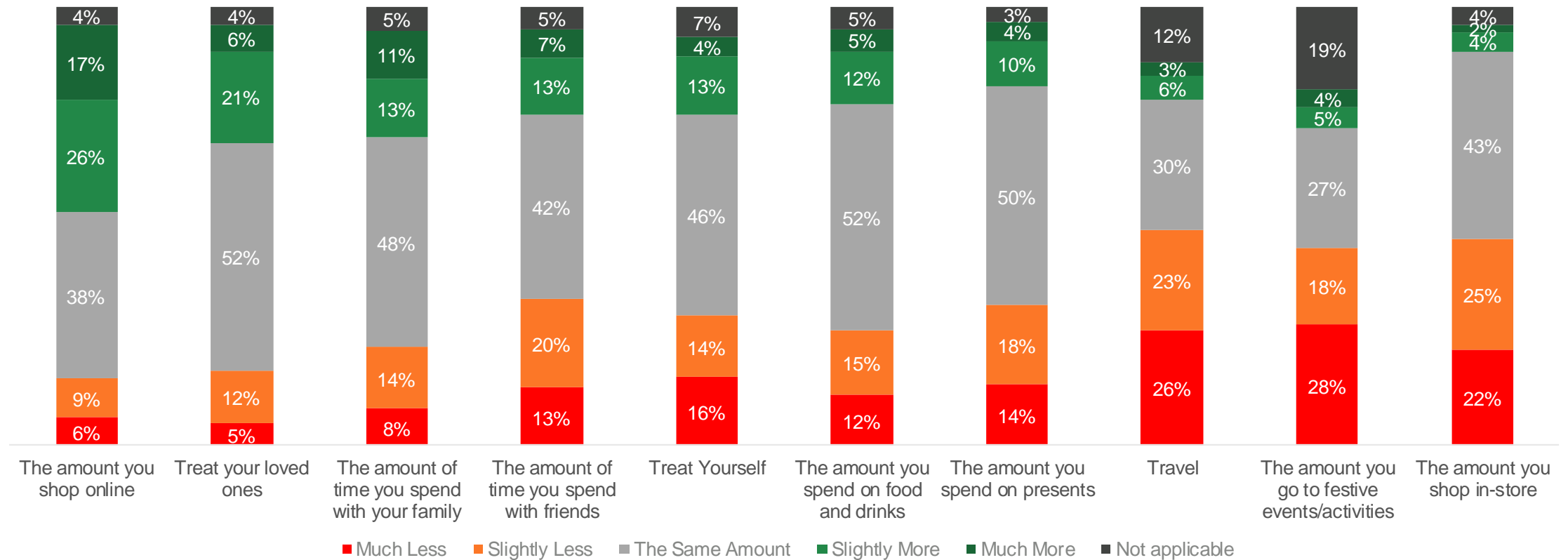
## When would you feel comfortable doing the following again?

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



# Intent to treat loved ones more has increased to overtake intent to spend more time with family

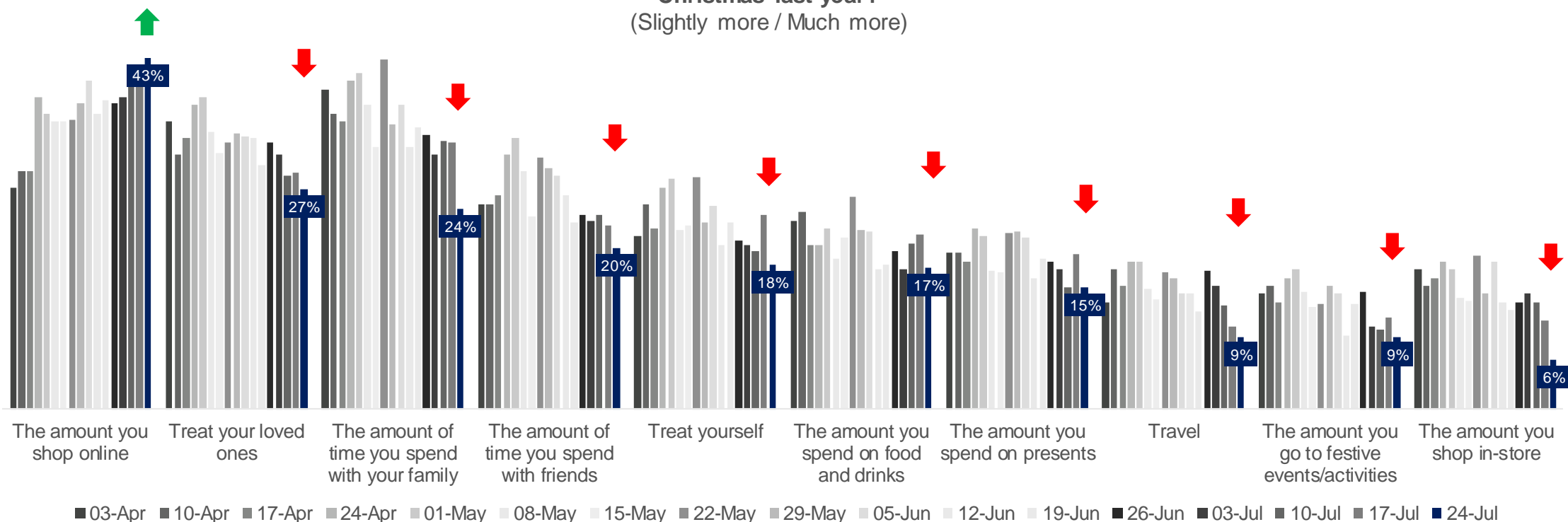
Looking ahead to Christmas 2020, do you think you will do more or less of the following actions compared to Christmas last year?





# There has been a notable increase in intent to treat yourself more at Christmas, as well as spending more on presents

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)



# 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 20<sup>th</sup> 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 26<sup>th</sup> 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 60**  
Covid-19 Special #19  
Friday 24/07/2020

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