

COVID-19 Consumer Impact Report
w/c 03.08.20

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 31st July to Sunday 2nd August 2020.



Summary: Consumer confidence and optimism are improving, however news of a second wave has had an impact on certain behaviours

- 01 **Happiness has increased** this week by 4ppts from **34%** to **38%** and **optimism has increased 5ppts** from **13%** to **18%**, after recording the lowest level since the pandemic began last week, however **anxiety levels are creeping up WoW**.
- 02 Financial outlook has also shown improvements as **less people report that money is tight at the moment (down 2ppts)** and confidence in business conditions increased **11%** to **16%**, leading to a rise in consumer confidence (**-9.0** to **-5.5**).
- 03 **Confidence in the Government** marginally increased this week (from **29%** to **30%**), but remains **28ppts** lower than its peak in April (**58%**).
- 04 On the weekend of the FA cup, **watching sport has increased 8ppts** and **going to the gym** has increased **5ppts** as venues continue to reopen, however, **going out for dinner** at a restaurant and **going for drink** at bar or pub has **decreased** slightly after a spike last week.
- 05 **Anticipation for activities** continue **have declined WoW**, and there has been **a large drop in anticipation for booking an overseas holiday** as new quarantine rules have been announced for those returning from certain countries.
- 06 **There have been significant decreases in the number of people that feel comfortable returning to out of home activities**: feeling comfortable going shopping is down **9ppts**, returning to work is down **15ppts**.

The image features a minimalist design with a green circle in the upper right quadrant, set against a white background. This white area is partially enclosed by a larger green shape that curves around it from the top and right. In the bottom left corner, there is a block of white text on a green background.

**Life satisfaction,
optimism & consumer
confidence**



After a record low last week, optimism is improving alongside rates of happiness, however anxiety levels continue to creep up amidst news of a second wave

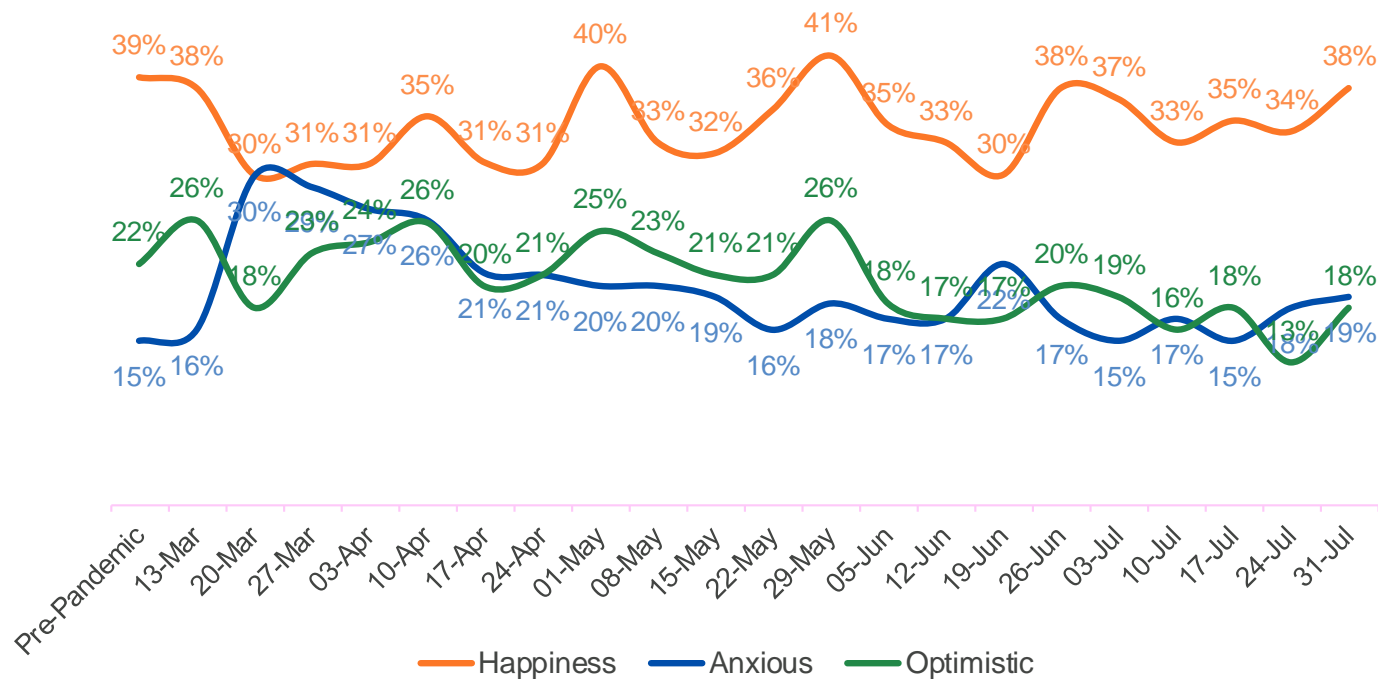
↑ **Happiness** has increased this week by 4ppts from 34% to 38%

↑ **Optimism** has increased 5ppts from 13% to 18%, after recording the the lowest level since the pandemic began last week

↑ **Life satisfaction** has increased by 4ppts from 26% to 30%

↑ **Anxiety levels** have increased this week, from 18% 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



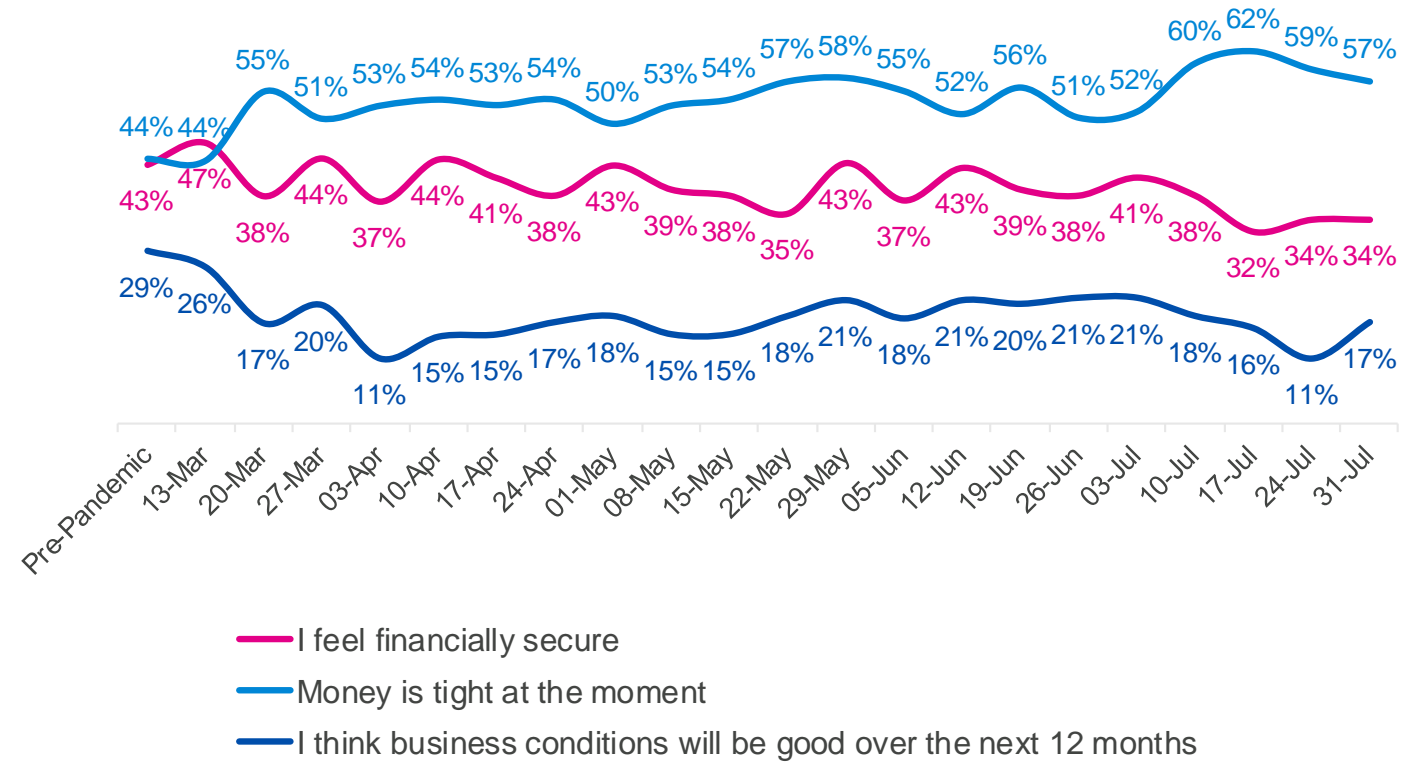
Financial outlook has also shown improvements as less people report that money is tight at the moment and confidence in business conditions increases

■ **Feeling financially secure** has remained the same at 34%

↓ The number of people reporting that **money is tight** at the moment decreased this week by 2ppts from 59% to 57%.

↑ **Confidence in future business conditions** has increased this week from 11% to 17%

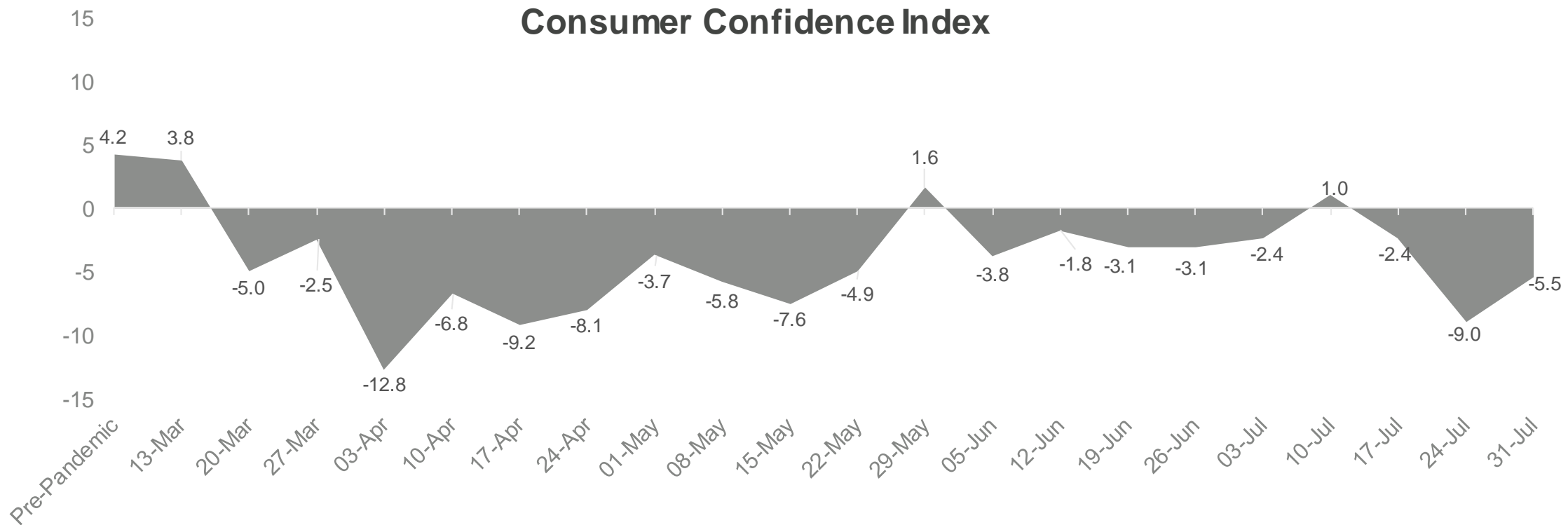
To what extent do you agree with the following statements?
(0=Not at all, 10=Completely)
% selecting top 3 (8-10)



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



After a significant decline last week, consumer confidence has increased from -9.0 to -5.5 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.



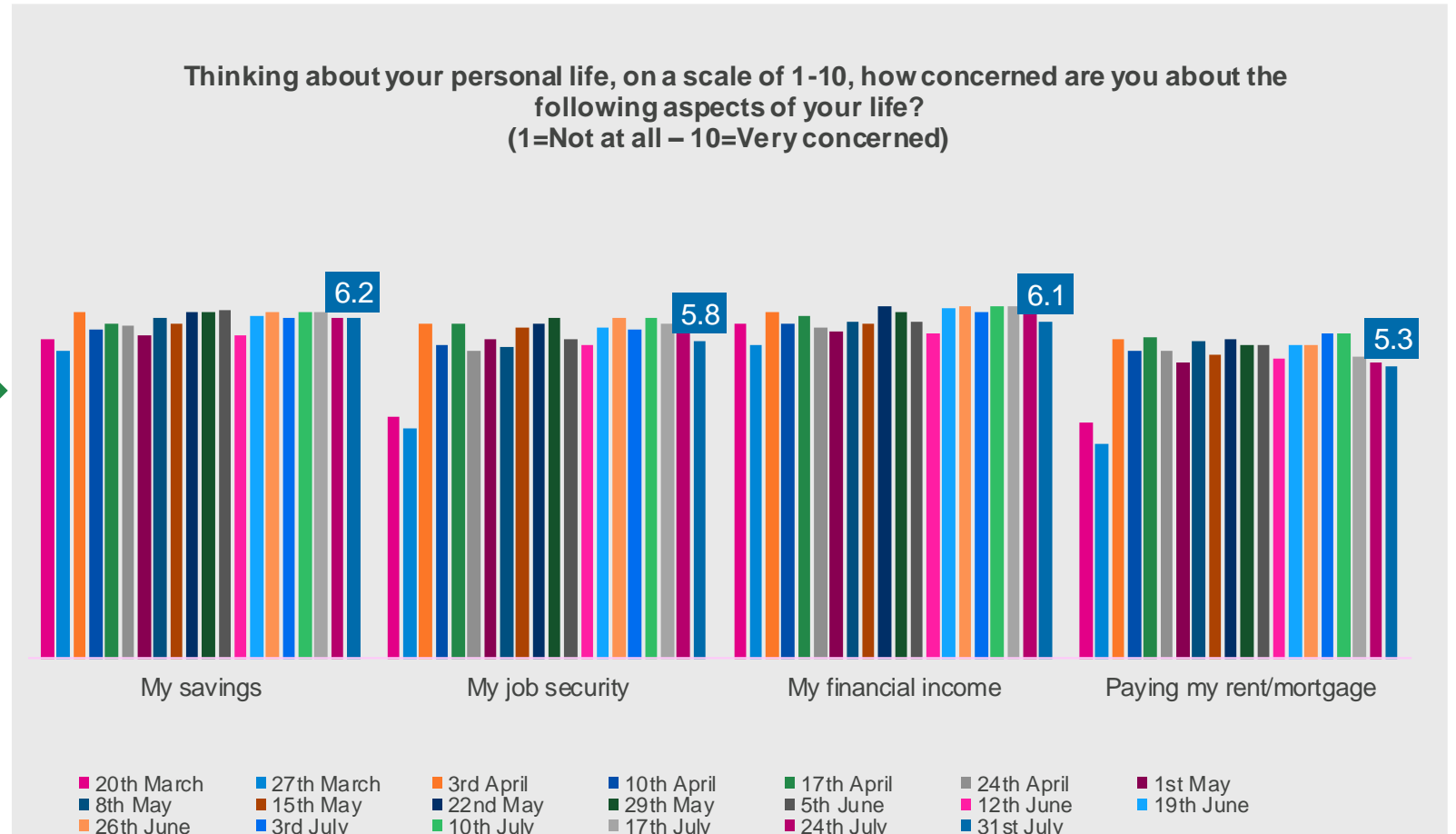
Financial concerns have remained stable WoW, and the % of households that have someone furloughed has decreased 4ppts

19% 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

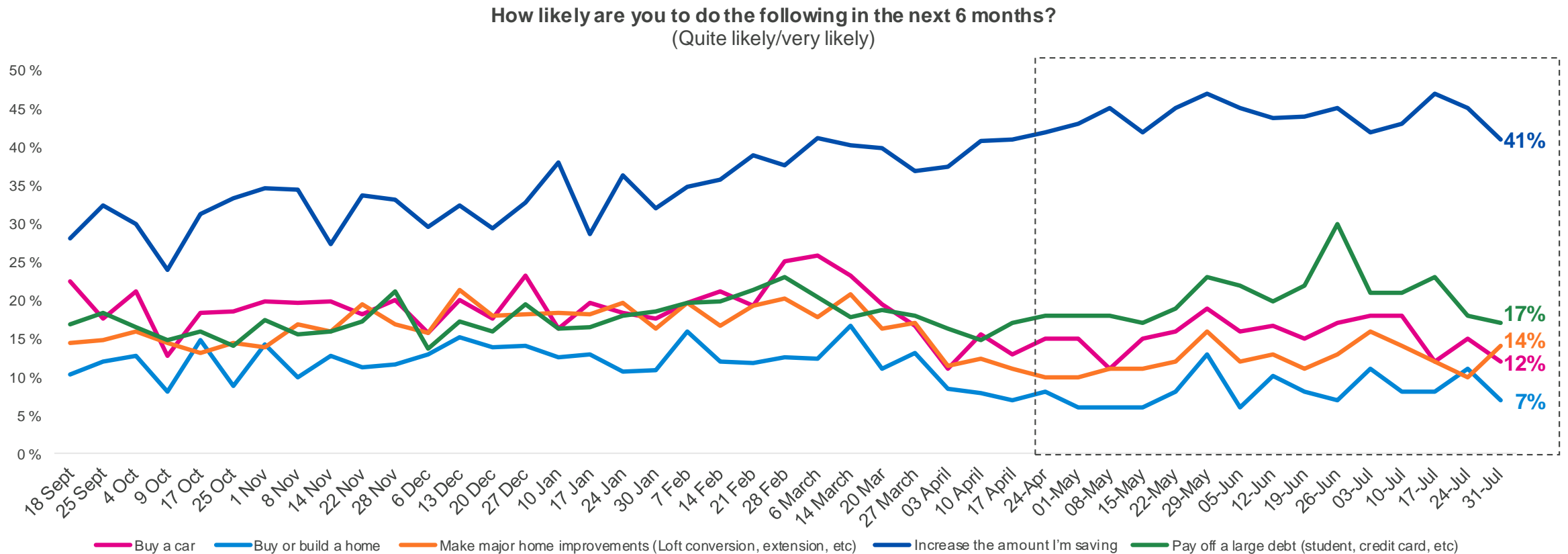
69% say that their employer has been **supportive** during the COVID-19 outbreak





After a spike last week, plans to buy a car or buy/build a home have decreased as intention to pay off debt and increase savings continues to decline

Plans to increase savings has dropped to 41%, reflecting a gradual decline in this metric WoW as financial security levels stabilise



Confidence in Government & Broad Concerns



Confidence in the Government marginally increased this week, but remains 28ppts lower than its peak in April

Low confidence in the government is due to continued confusion around new restrictions and localised rules across the country

“Rules and guidelines seem to always change”

“Information is not clear and very confusing. They contradict themselves all the time.”

“Some inconsistencies in the decisions/advice given”

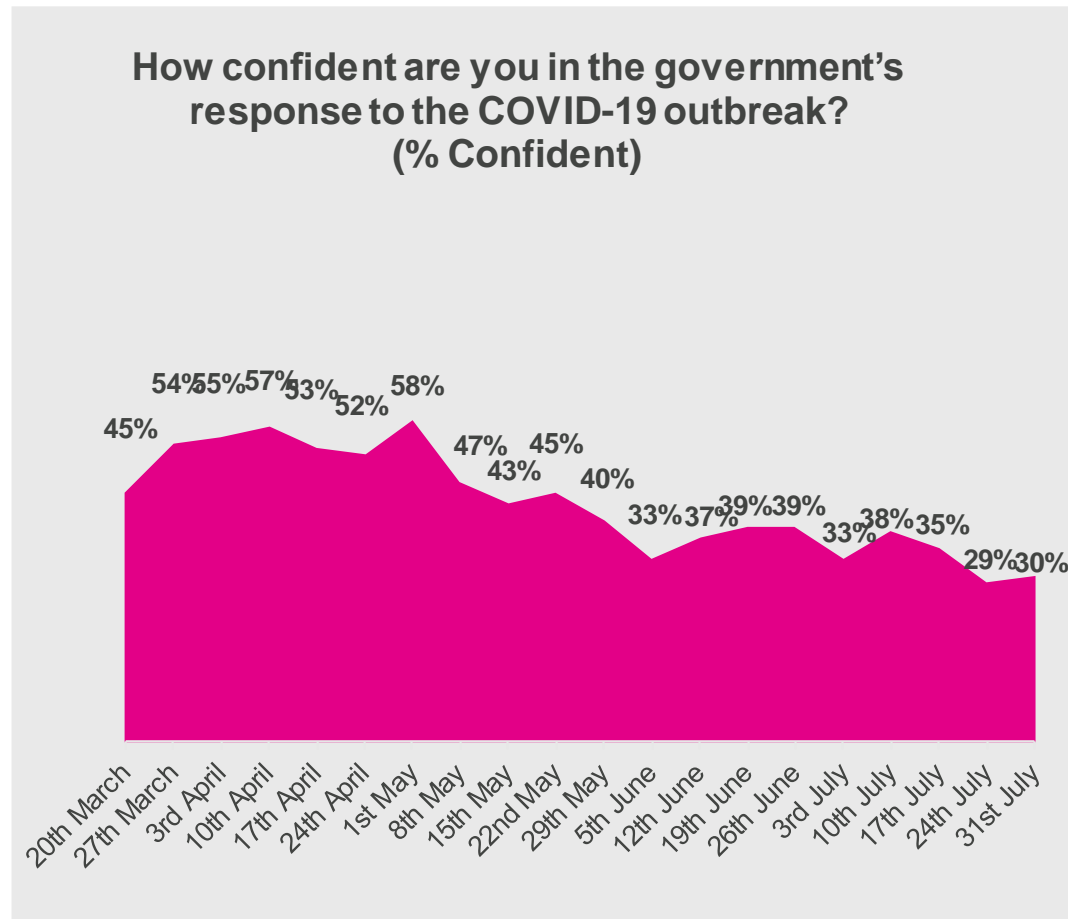
“I know they’re trying to do the impossible but I feel the guidelines are confusing”

The timing of enforcing masks in shops and easing of lockdown restrictions remains a common focus of criticism

“They bring in masks long after the peak and not beforehand then they lift lock down and now cases are on the rise once more.”

“Too late doing a thing. Still no proper tracking system that works and too long getting the vaccine agreed”

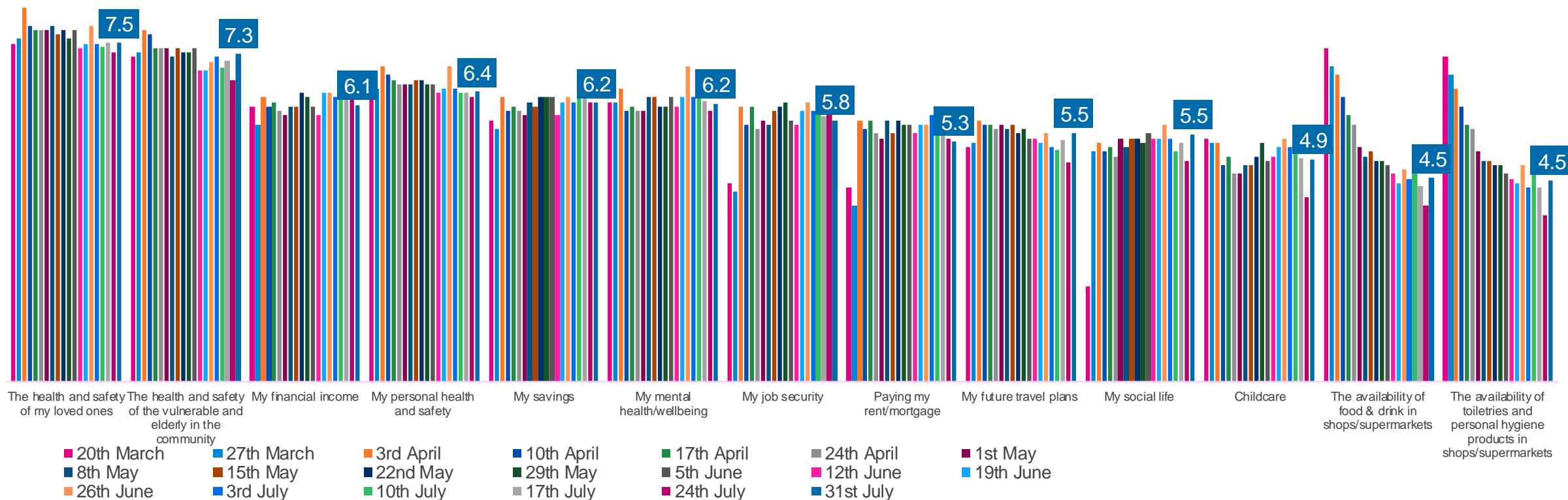
“Mask should have been the law as soon as covid appeared it's absolutely ridiculous that they weren't introduced for months.”





As predictions of a second wave mount, concern over the health and safety of loved ones and the vulnerable in the community have increased slightly

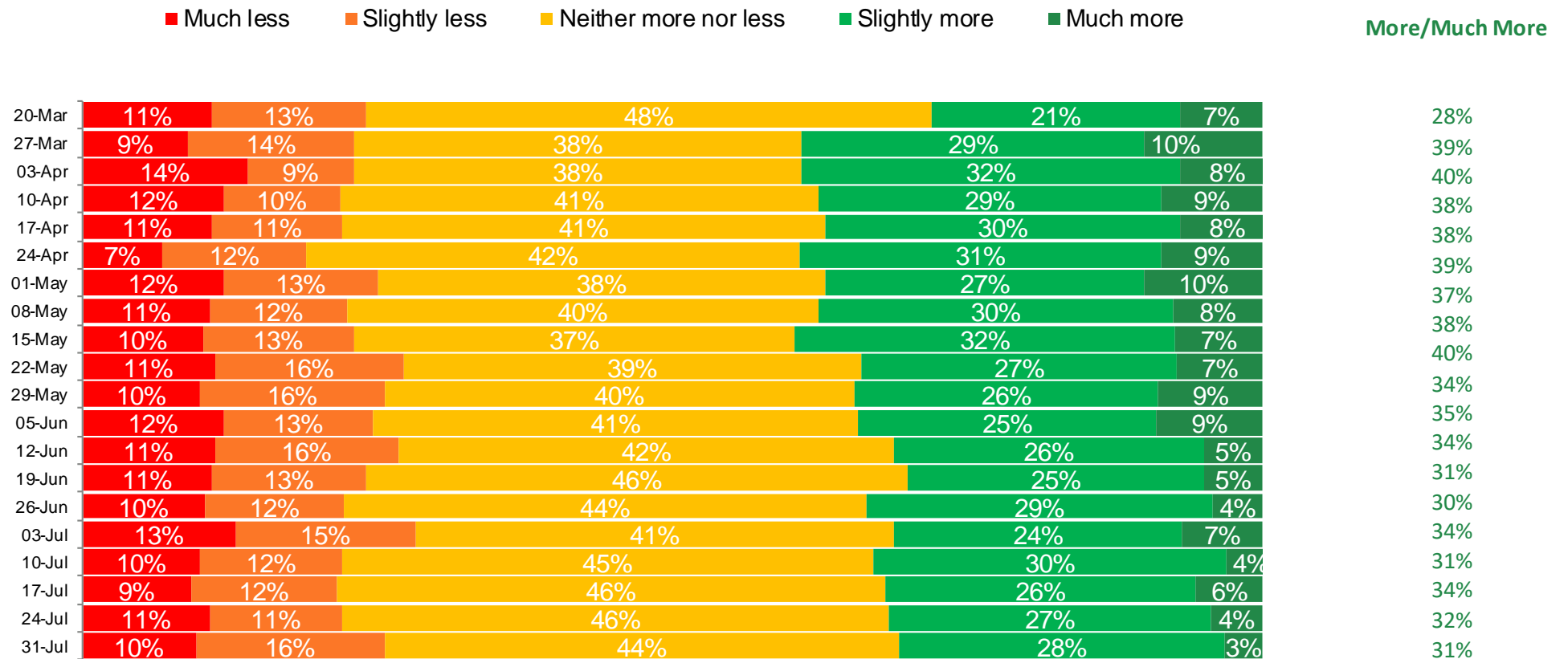
Thinking about your personal life, on a scale of 1-10, how concerned are you about the following aspects of your life?
(1=Not at all – 10=Very concerned)





This week less people are reporting feeling more connected to their community compared to before the COVID-19 outbreak

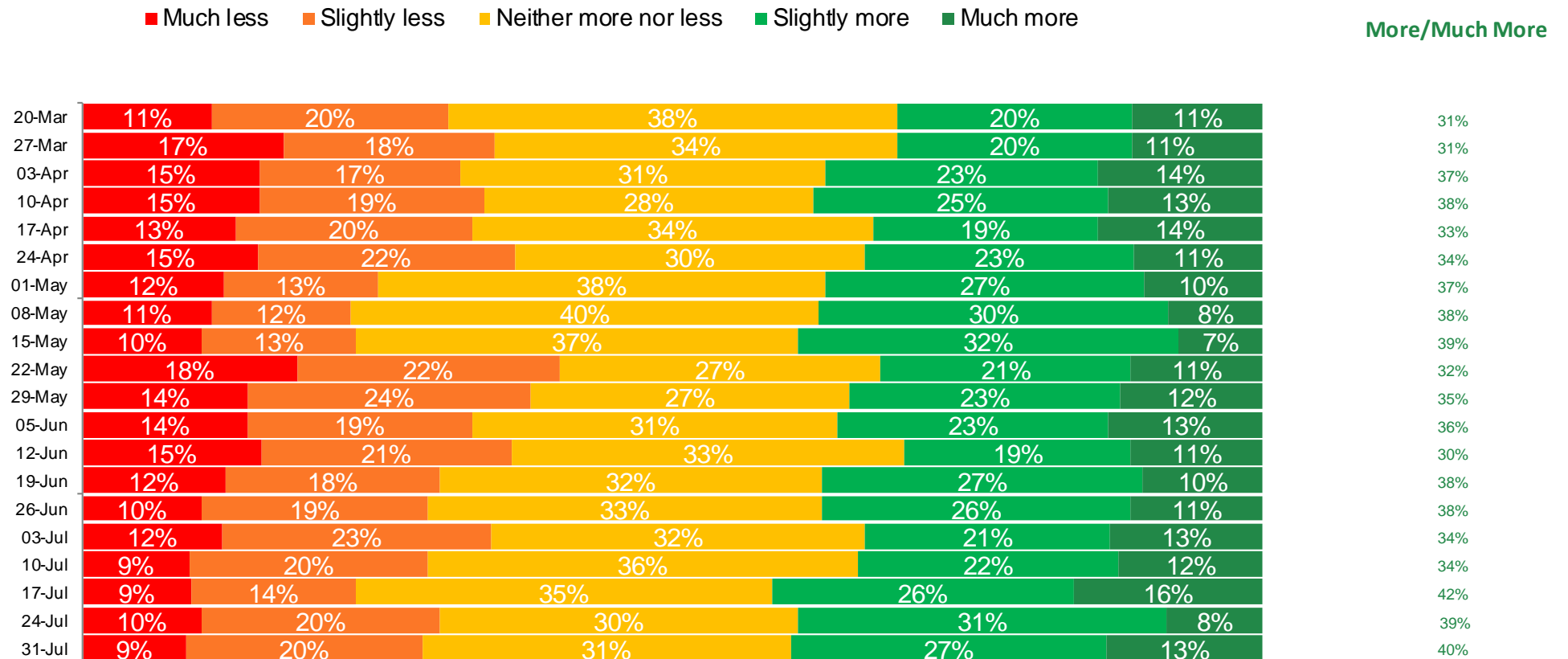
To what extent do you feel more or less connected to your community compared to before the COVID-19 outbreak?





However feeling more connected to friends and family in the last 7 days has increased slightly this week

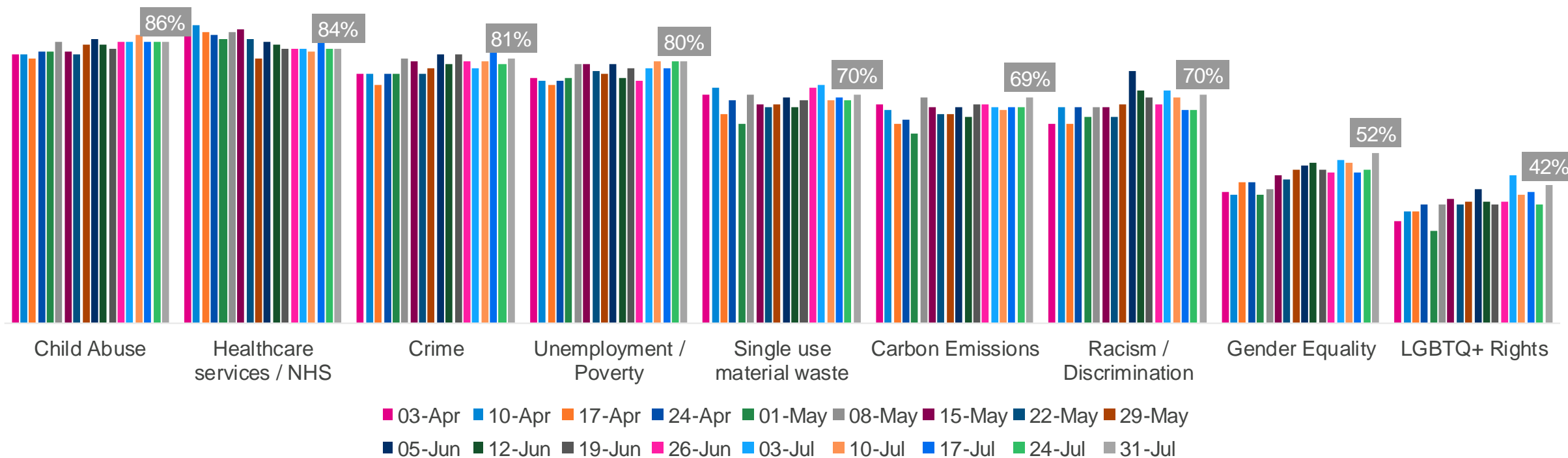
To what extent do you feel more or less connected to your friends / family compared to before the COVID-19 outbreak?





Concerns over Racism/Discrimination and Gender Equality have increased by 5ppts this week

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

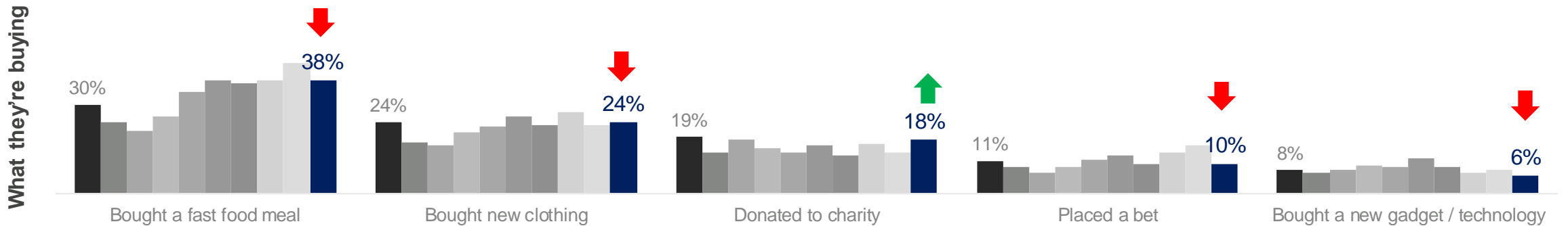
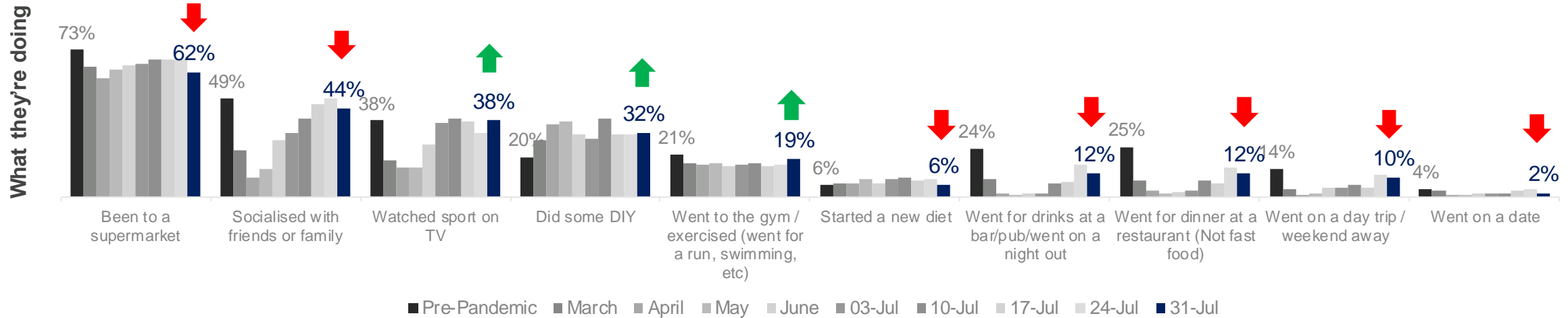


Changes in Behaviour



On the weekend of the FA cup, watching sport has increased 8ppts and going to the gym has increased 5ppts as venues continue to reopen

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



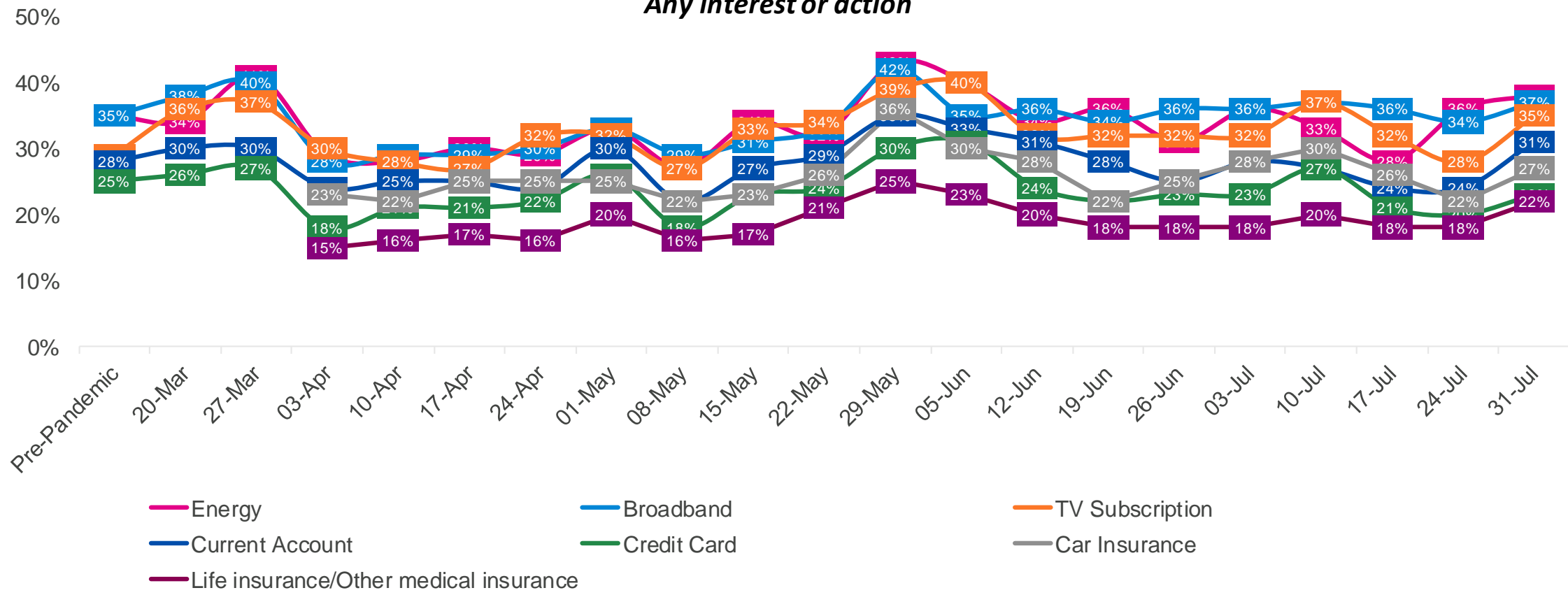
Source: OMD Radar Survey. Pre-Pandemic: 12,076, March: 1,716, April: 2,000, 08-May: 500, 15-May: 500, 22-May: 500, 29-May: 500, 05-June: 500, 12-June: 500, 19-June: 500, 26-June: 500, 03-July: 500, 10-July: 500, 17-July: 250, 24-July: 250, 31-July: 250



There has been a significant increase in people taking interest in or action on switching their subscriptions and suppliers for all tracked behaviours except life insurance

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

Any interest or action



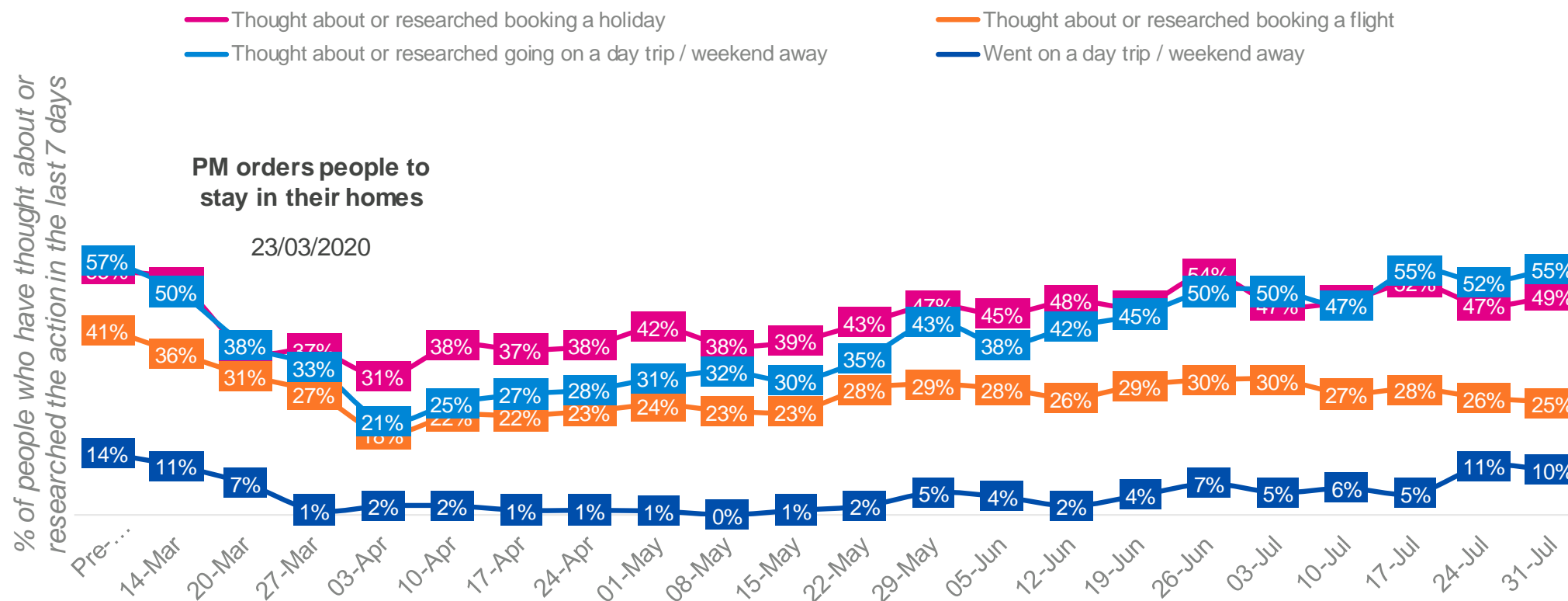
Pre Pandemic - data from 18 Sept 2019 - 6 March 2020. n=5888.

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 or going on a day trip/weekend away has increased slightly this week

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

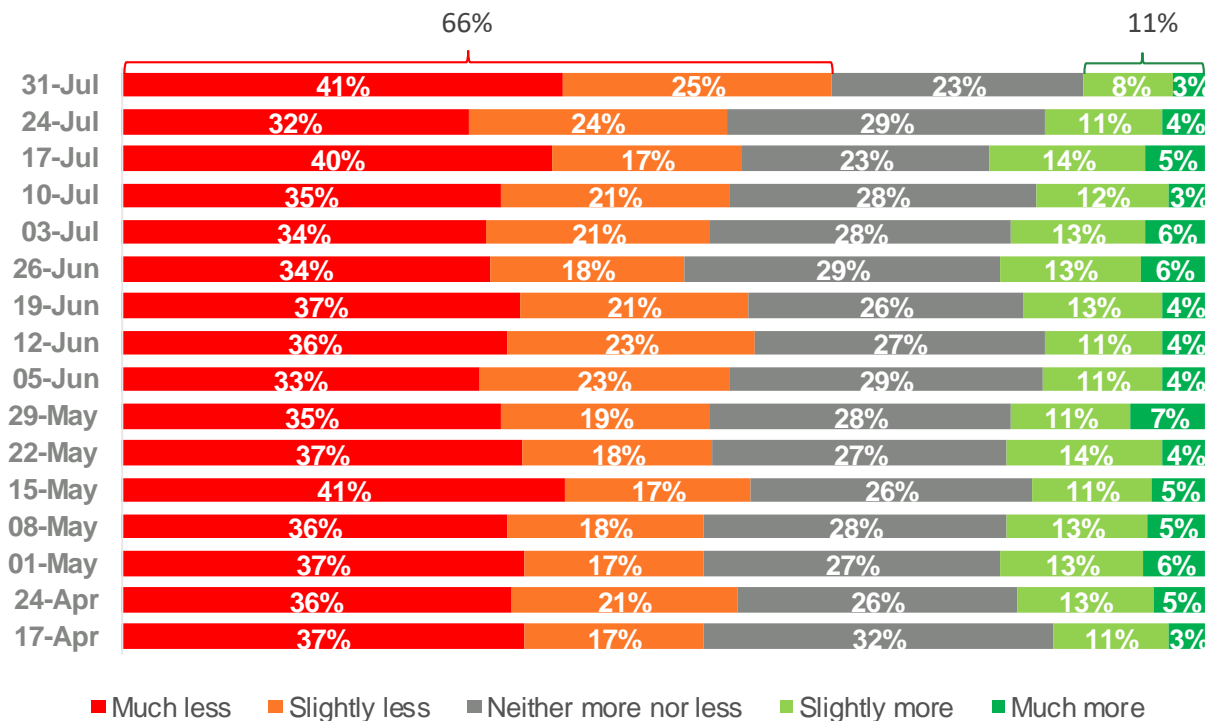




However the number of people who predict they will take less holiday than the previous year has jumped significantly this week

As uncertainty remains and new quarantine rules have been announced for those returning from certain countries, the number of people who expect to take more holidays has declined WoW

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 will not be taking holidays until the whole Covid situation is more stable and safe”

“Holiday this year got cancelled and I can’t afford another one”

“I am still self isolating and shall continue to do so until there is a vaccine. Until then I do not fancy risking travelling in any shape or form”

“Unsure as to holiday plans over the coming 12 months”

“Once things open back up I want to make more use of my time to travel and take holidays”

“Because quarantine has been really boring and I just want to get away”

“I intended to take the same amount of holiday as I did last year - I do not have concerns around travelling.”



Changes in Media Consumption

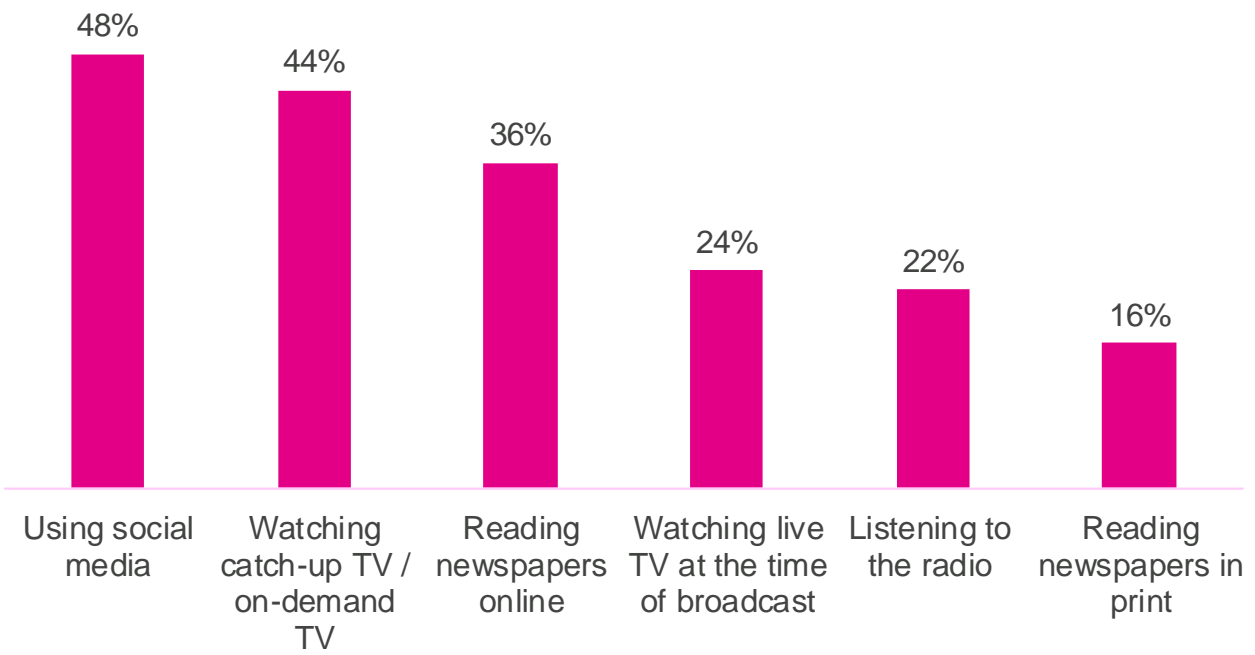
(claimed, sample = 250; this data should be used alongside industry gold-standard reporting, e.g. BARB, where available)



In the last week, engagement with media has increased, with most feeling like they spend more time across channels compared to pre-Covid

- ↑ **48%** say they are consuming social media more than before the pandemic, up 2ppts since last week.
- ↑ **36%** say they are consuming more newspaper articles or stories online/on a device, up from **33%** last week.
- ↑ Reading newspapers in print has increased a lot in the last 7 days with **16%** claiming to be reading more during COVID-19, up 7ppt from last week.
- ↑ **22%** say they are consuming more radio during lockdown, 4ppt higher than last week.
- ↓ Consuming more live TV at the time of broadcast has declined since last week, with **24%** claiming to be consuming more, down 4ppts.
- ↑ Watching more catch-up or on-demand TV has increased by 3ppt in the last 7 days – with **44%** 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)

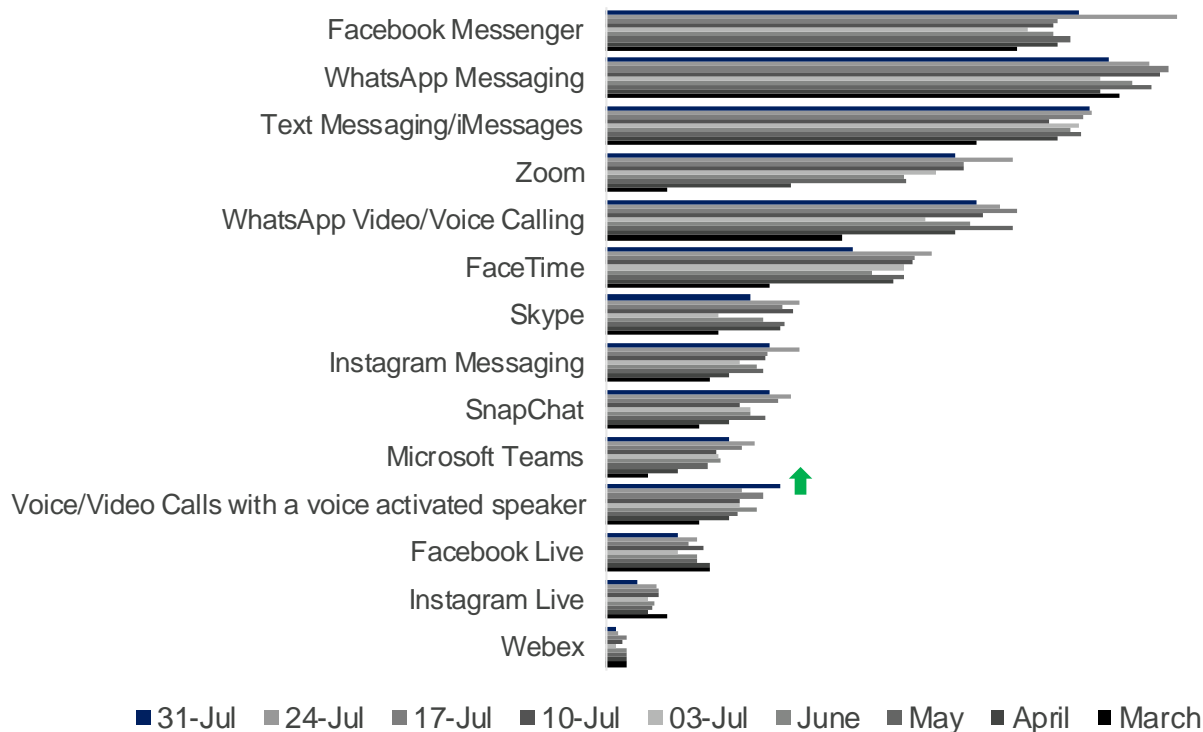




Gaming together using a console or app whilst in different locations saw a notable uplift this week

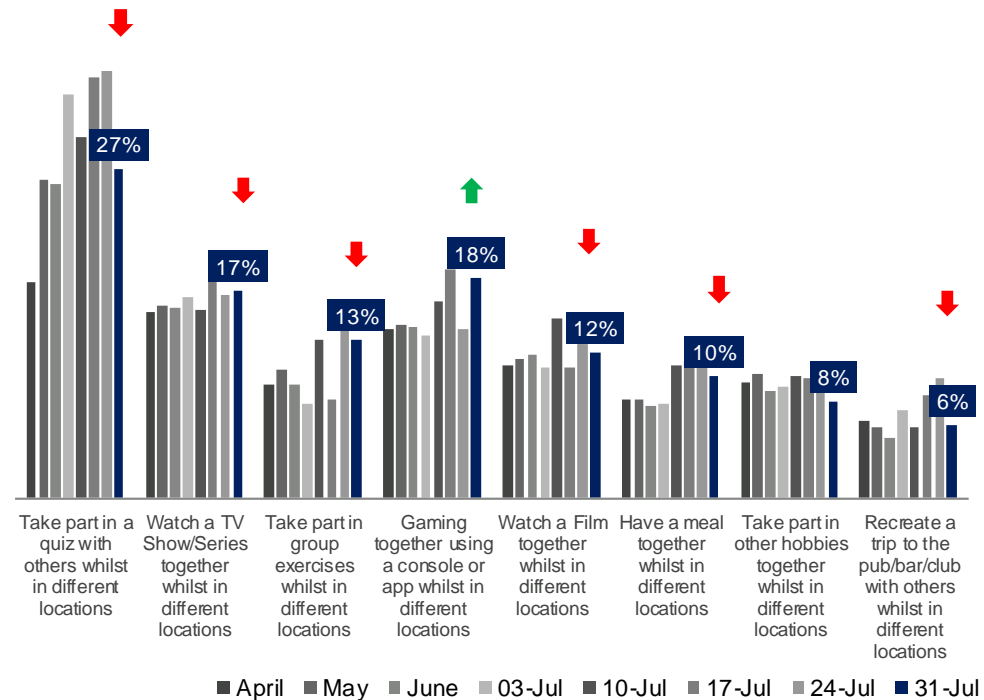
Use of communication services increased across most platforms in the last 7 days

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

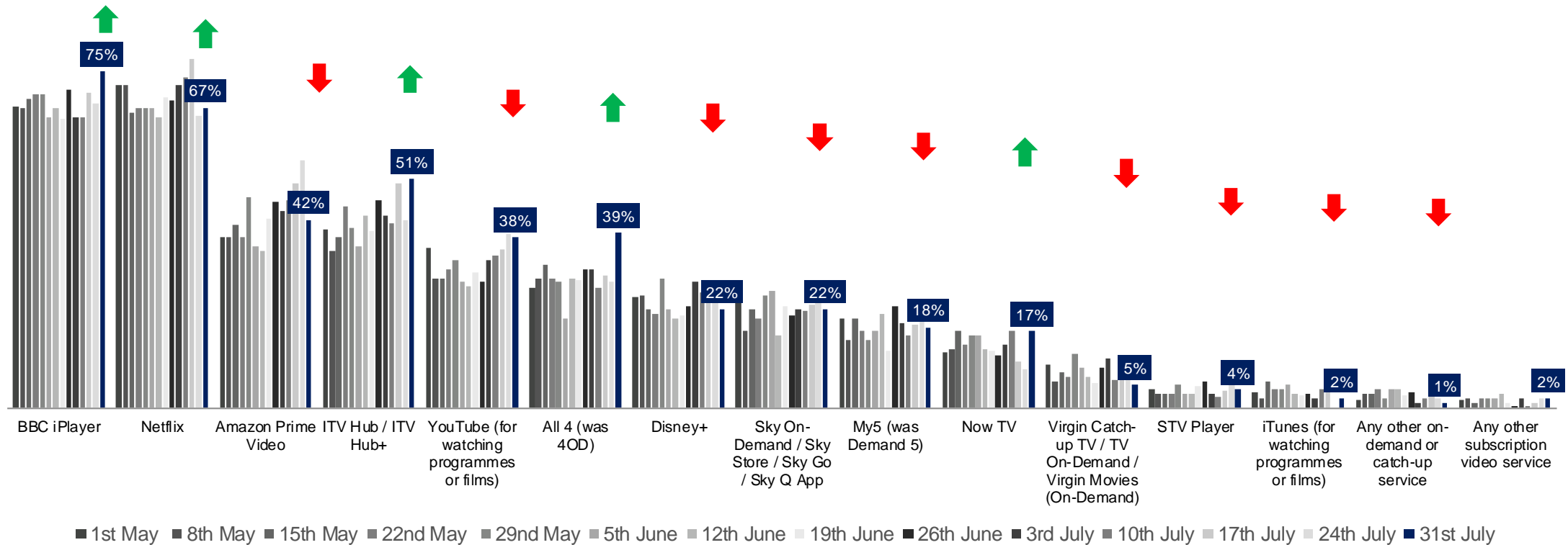
Which, if any of the below occasions have you used technology to do?





Broadcast VOD services experienced increases in the volume of viewers consuming more than they used to, All 4 and ITV Hub saw the most notable 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?

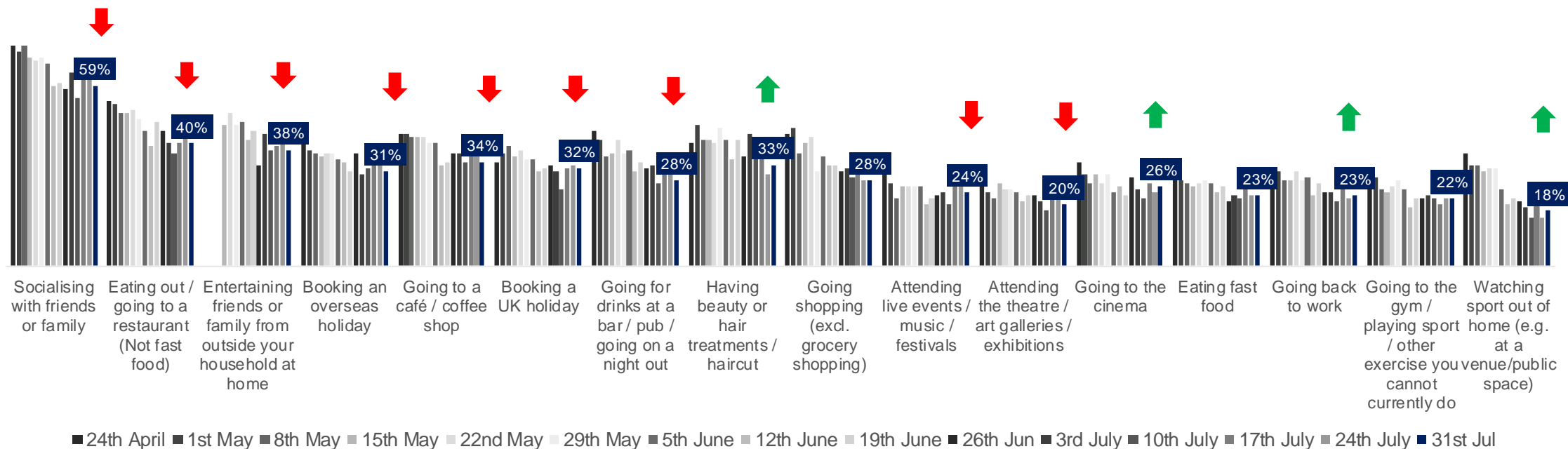




Looking ahead

Anticipation for activities continue to decline WoW, particularly around booking overseas holidays as new quarantine rules have been announced

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)

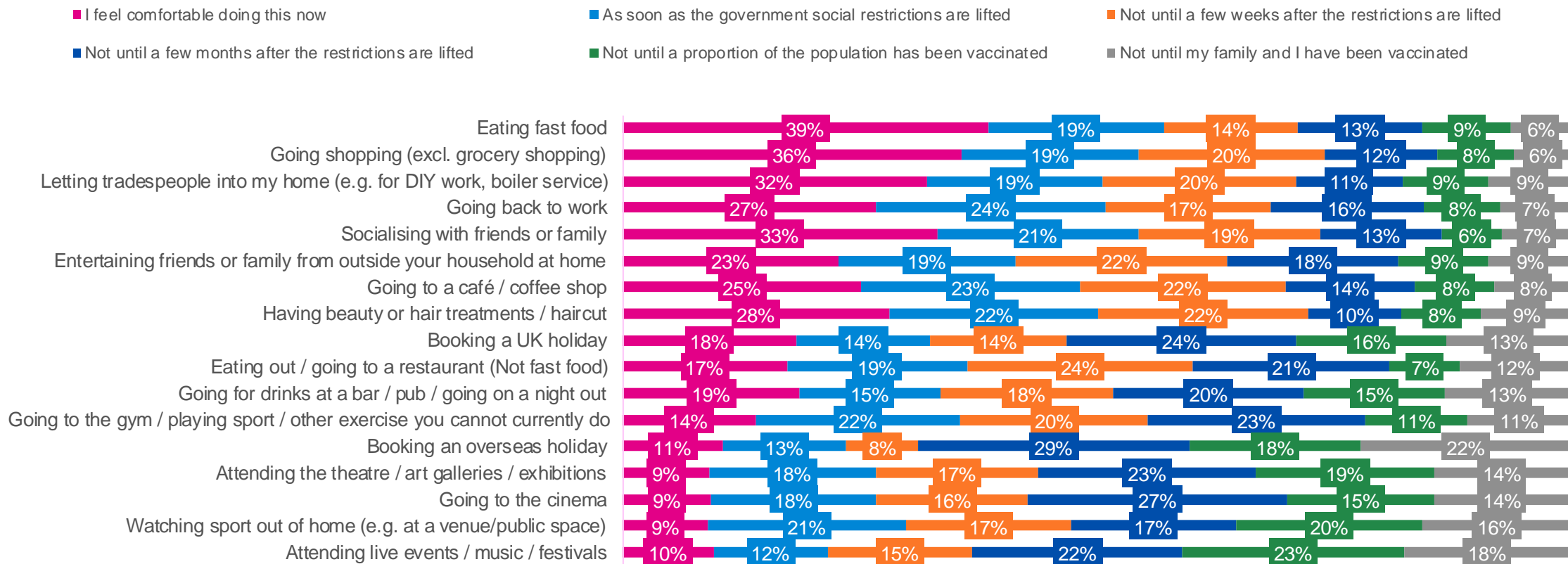




There have been significant decreases in the number of people that feel comfortable returning to out of home activities

There has been a 9ppt decrease in people feeling comfortable going shopping, a 15ppt decrease in people feeling comfortable returning to work, a 10ppt decrease in feeling comfortable booking a UK holiday and a 7ppt decrease for booking an overseas holiday

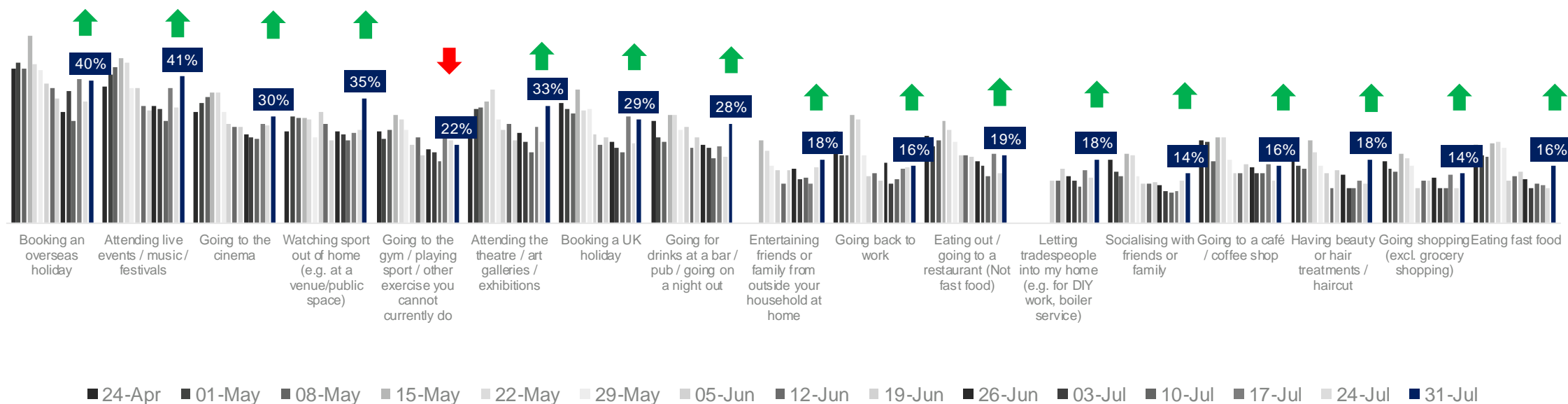
When would you feel comfortable doing the following again?



The number of people who would not feel comfortable doing out door activities until a vaccine has increased across all activities with the exception of going to the gym

When would you feel comfortable doing the following again?

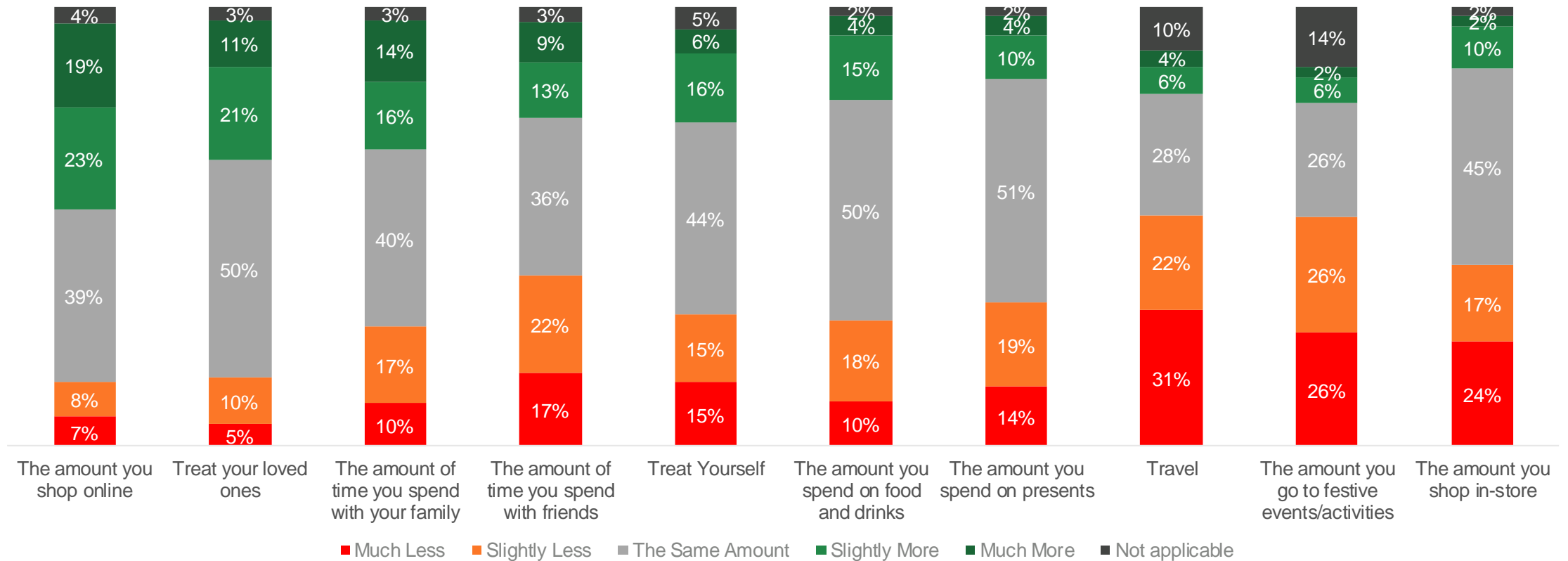
(Not until a significant proportion of the population has been vaccinated / Not until my family and I have been vaccinated)





More people predict they will spend less time with friends and family this Christmas (up 6ppts and 5 ppts respectively)

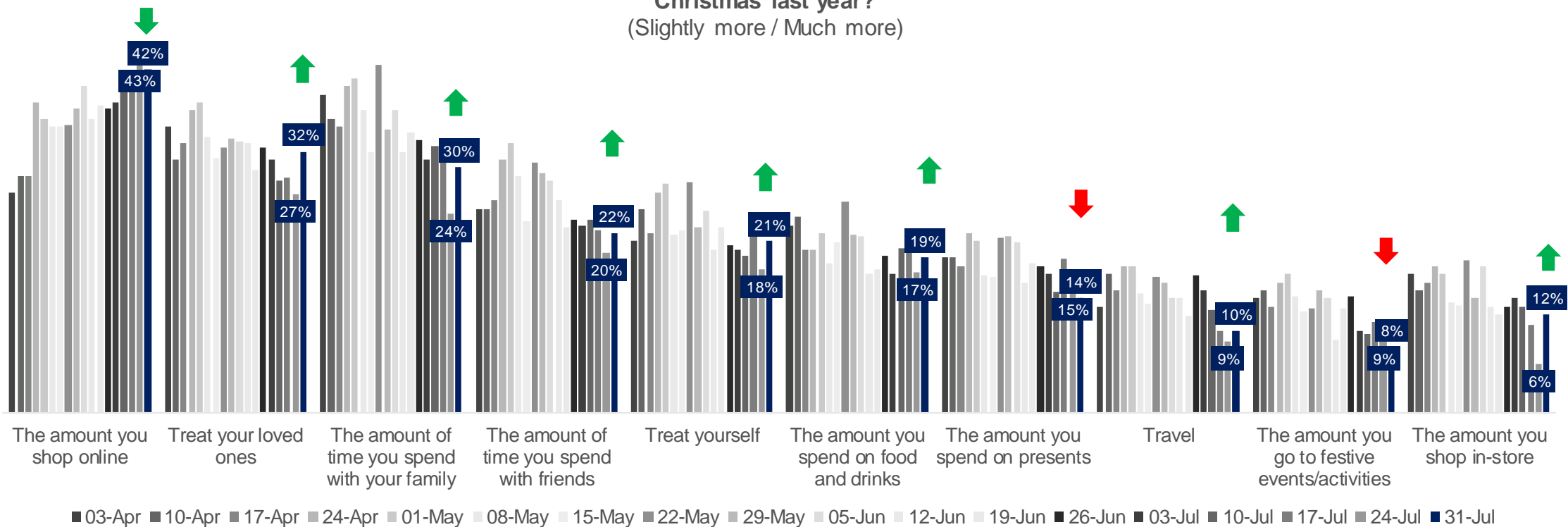
Looking ahead to Christmas 2020, do you think you will do more or less of the following actions compared to Christmas last year?





There has been a notable increase in intent to shop in-store more, up 6ppts

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)

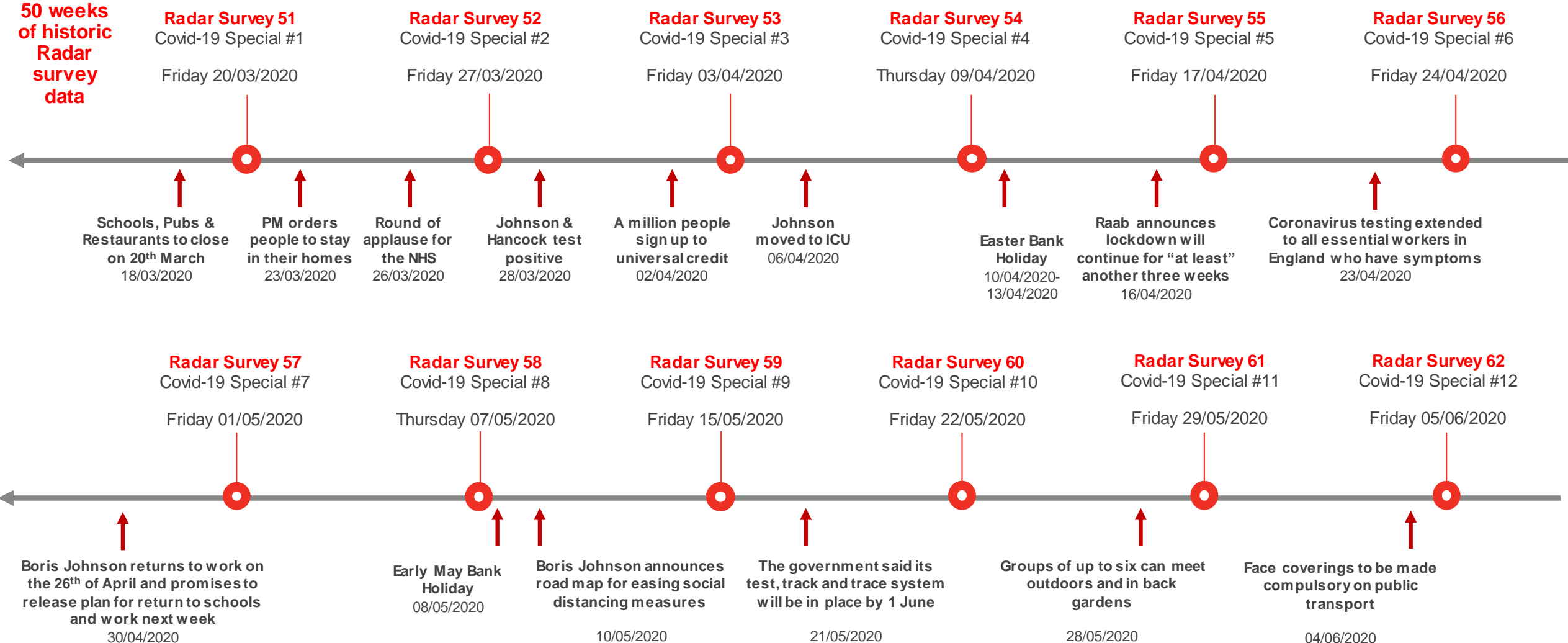


Appendix



Survey Timeline

50 weeks
of historic
Radar
survey
data





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

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



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

