

**COVID-19 Consumer Impact Report**  
w/c 17.08.20

**OWNED**



RADAR

THE FUTURE OF BRITAIN  
**YOUR VOICE**



# Contents

**01**

Introduction  
& Summary

**02**

Life satisfaction,  
Optimism &  
Consumer  
Confidence

**03**

Confidence in  
Government &  
Broad Concerns

**04**

Changes in  
Behaviour

**05**

Looking  
Ahead

**06**

Appendix

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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, x



## Summary: Optimism hits a record low as concerns for job security and financial incomes increases





- 01** **Happiness and life satisfaction** are down (4ppts and 1ppts respectively) and **optimism** has declined to **14%**, the lowest level since the pandemic began.
- 02** Feeling **financially secure** continues to show signs of improvement WoW (increasing 4ppts from **39%** to **43%**), despite increasing numbers reporting money is tight at the moment (by 5ppts from **53%** to **58%**).
- 03** A third claim they are **confident in the government's response** to the pandemic so far, up slightly from last week (**30%** to **33%**)
- 04** **Going to dinner at a restaurant** has increased again this week, up 4ppts from **22%** to **26%** as people continue to make use of the government's eat out to help out scheme.
- 05** Despite new quarantine measures for people returning from France and the Netherlands, **thinking about or researching booking a holiday** has increased 6ppts from **43%** to **49%** as more show an interest in UK holidays.
- 06** **Anticipation for out of home activities** experienced positive movement in the last 7 days, however the number of people who would not feel comfortable doing outdoor activities until a **vaccine** is available has increased for most activities (with the exception of eating out)

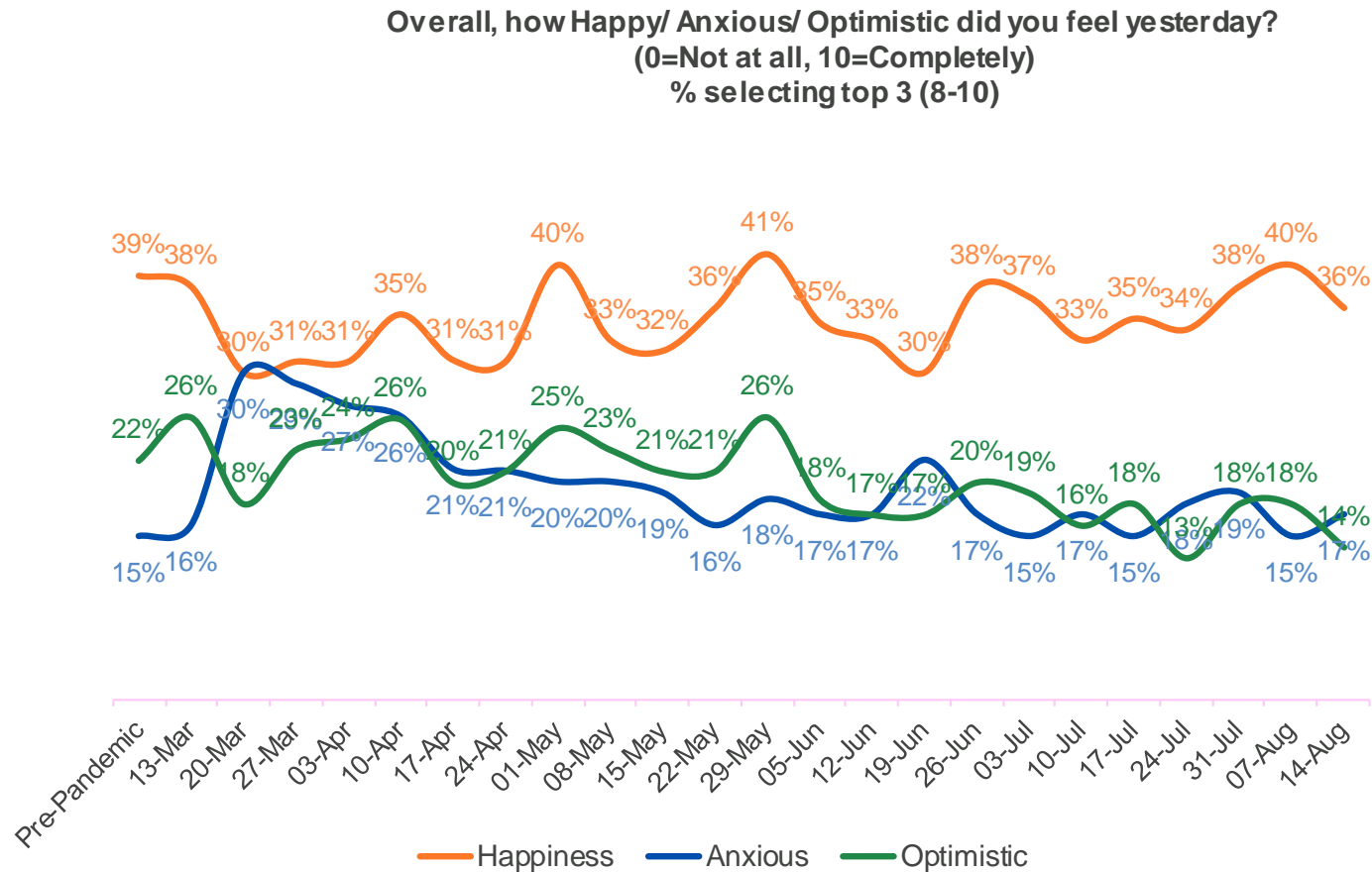


**Life satisfaction,  
optimism & consumer  
confidence**



# Happiness and Life Satisfaction are down and Optimism has declined to 14%, the lowest level since the pandemic began

- 
**Happiness has decreased** this week by 4ppts from 40% to 36%
- 
**Optimism has declined** from 18% to 14%, the lowest level recorded since the pandemic began
- 
**Life satisfaction has decreased** by 1ppts from 35% to 34%
- 
**Anxiety levels have increased** this week, from 15% to 17%





# Feeling financially secure continues to show signs of improvement WoW despite increasing numbers reporting money is tight at the moment



**Feeling financially secure** has increased 4ppts from 39% to 43%

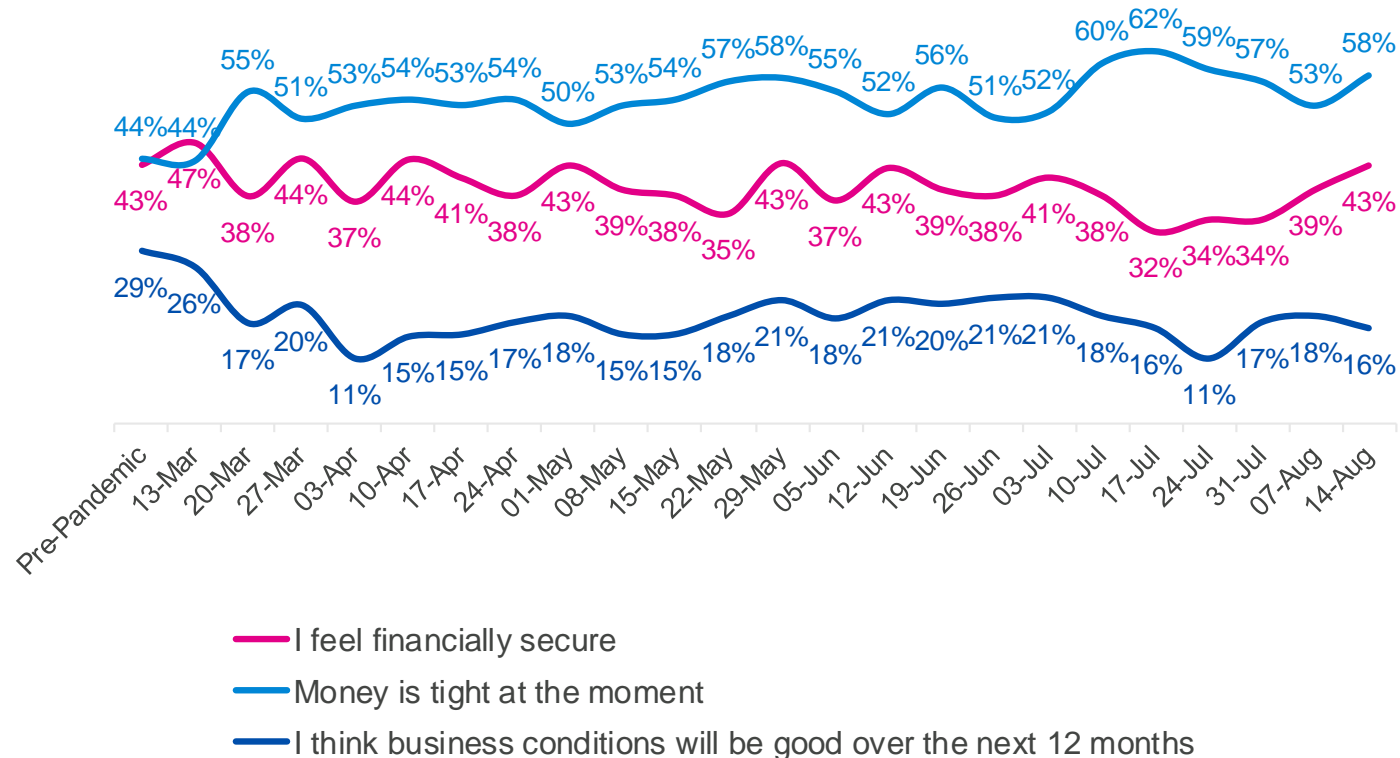


The number of people reporting that **money is tight** at the moment decreased this week by 5ppts from 53% to 58%.



**Confidence in future business conditions** has **decreased** this week from 18% to 16%

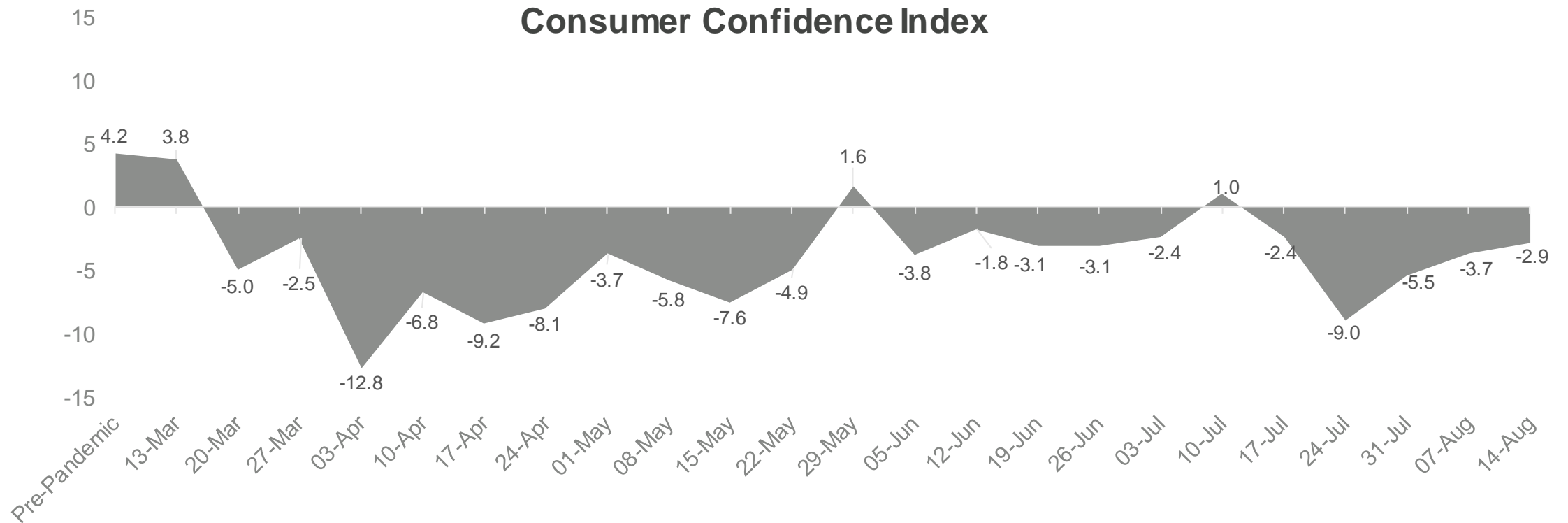
To what extent do you agree with the following statements?  
(0=Not at all, 10=Completely)  
% selecting top 3 (8-10)







# Consumer confidence shows continued signs of improvement as it increased again this week from -3.7 to -2.9



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.



# However concerns over financial outlook and job security have increased slightly this week

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

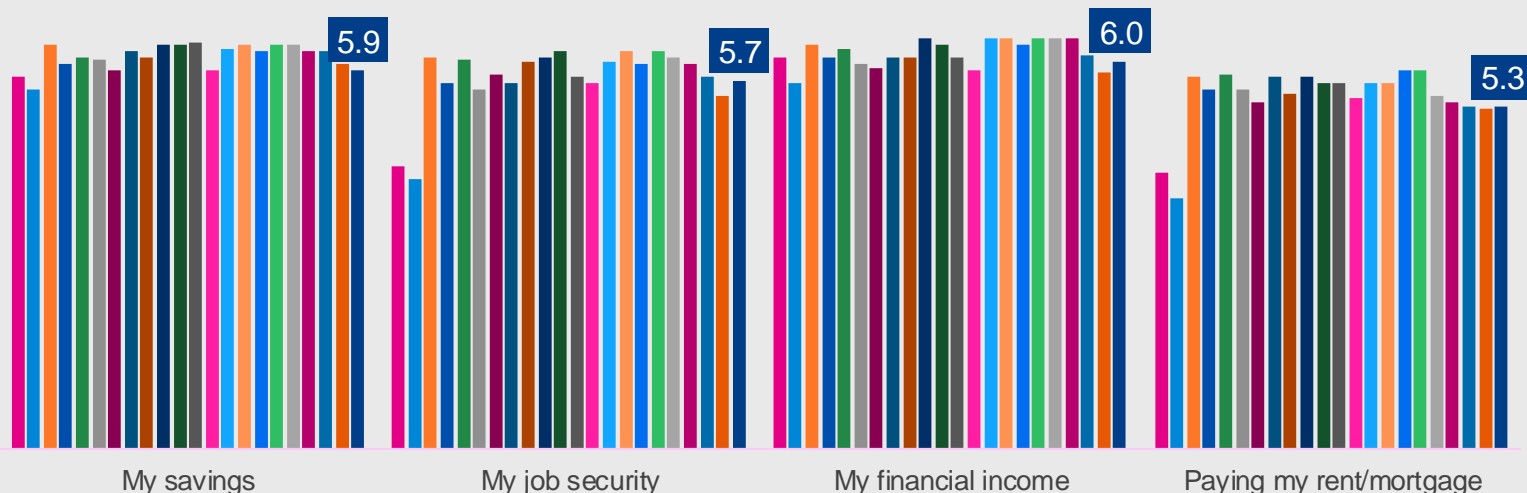
**5%** of households contain someone that has had their **salary reduced** since the COVID-19 outbreak

**4%** of households include someone that has **been made redundant** since the COVID-19 outbreak began

**68%** say that their employer has been **supportive** during the COVID-19 outbreak



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)

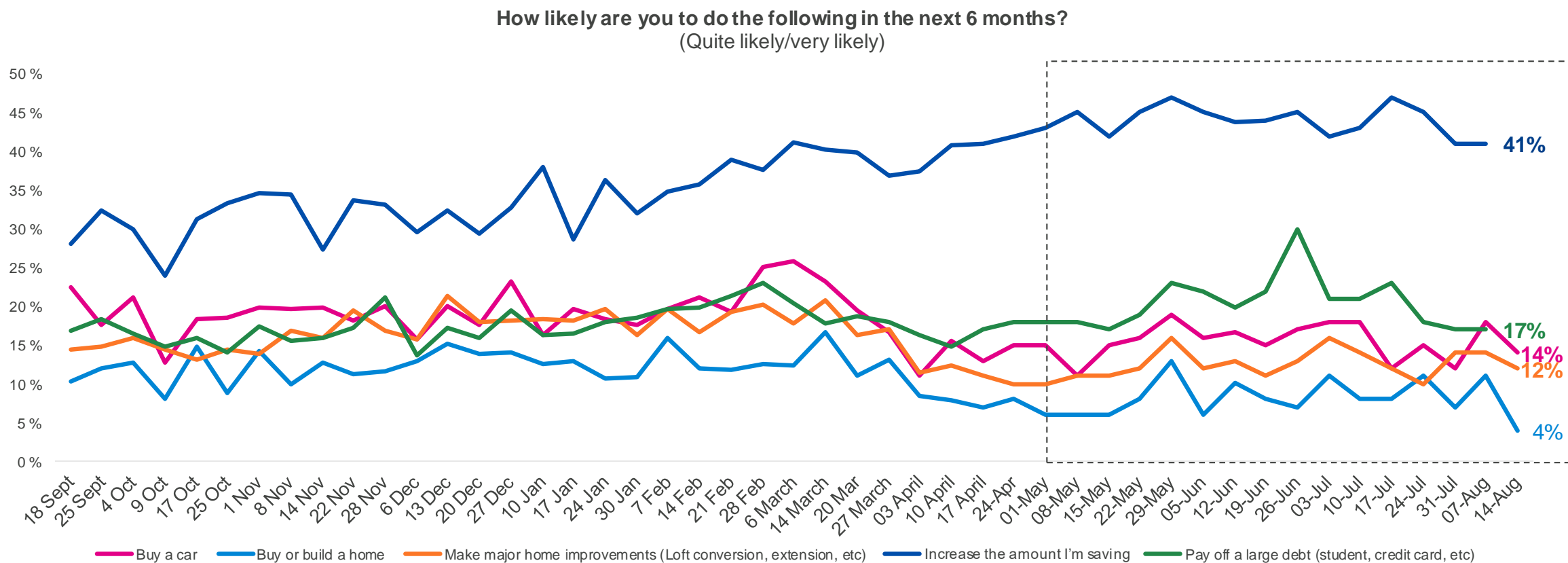


20th March    27th March    3rd April    10th April    17th April    24th April  
 1st May    8th May    15th May    22nd May    29th May    5th June  
 12th June    19th June    26th June    3rd July    10th July    17th July



# Plans to buy a car, buy or build a home or make home improvements have all decreased this week as more plan to increase their savings

Plans to make major home improvements, increase savings or pay off a large debt have all remained are unchanging this week



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, 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

# Confidence in Government & Broad Concerns



# A third claim they are confident in the government's response to the pandemic so far, up slightly from last week

Many feel the government's approach is not strict enough and fear for a second outbreak:

*"People are not all wearing masks and social distancing and too many large gatherings. We are risking a second outbreak"*

*"I am sure they have eased lockdown to early and people just aren't paying attention to social distancing. That is why I think a second wave is on its way. There is no enforcement of the social distancing or even mask wearing in shops"*

*I feel that a lot more could have been done a lot sooner and lives saved. I'm worried about a second wave and how the UK government is going to handle that."*

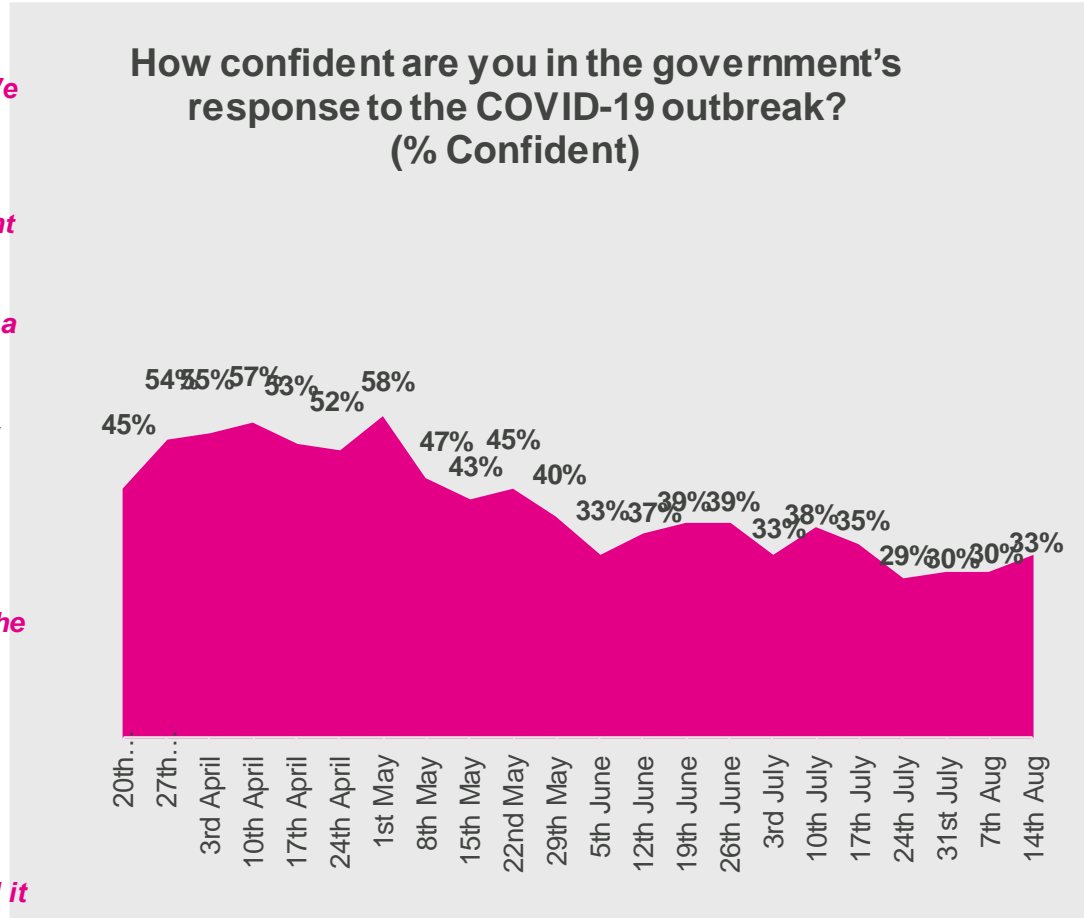
Those that report feeling confident feel the government are doing the best they can in response to an unprecedented challenge:

*"It's a new disease, they are learning as they go, making mainly right decisions"*

*I think there's a lot of negative criticism in the media about the government's handling of the pandemic. The truth is, no one knows how much better they or their preferred party would've handled the situation by comparison, as there's no fixed strategy for something like this - there are too many fluid variables"*

*"They have done an ok job in unprecedented times. I don't think anyone else could have done any better."*

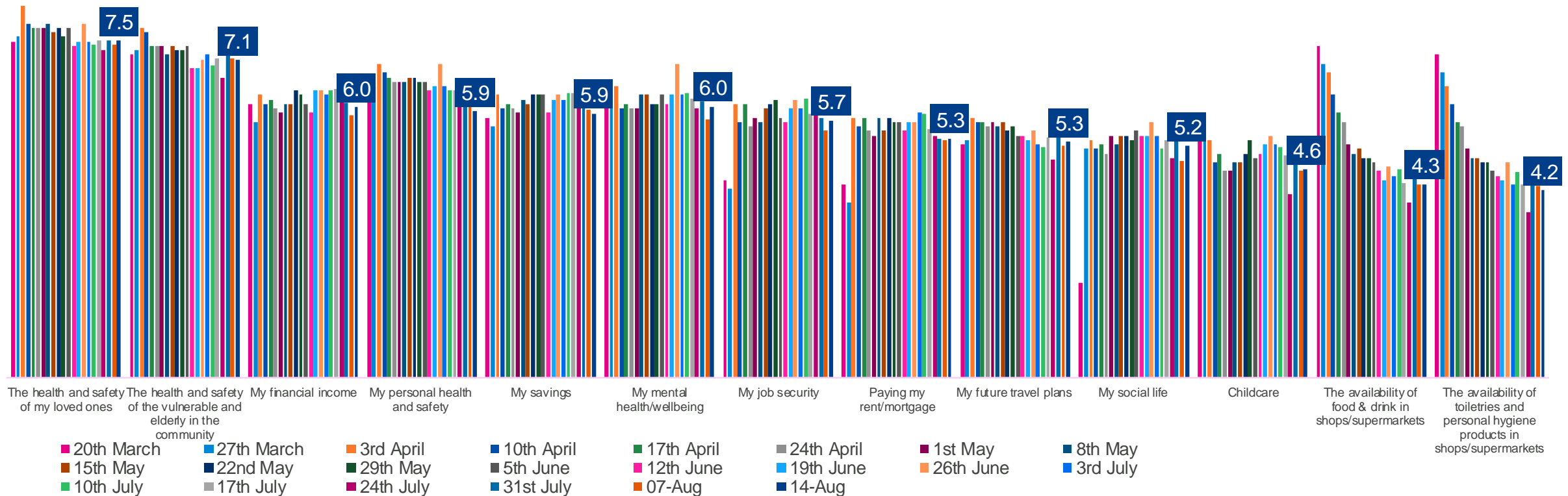
*"It is difficult for anybody to know what is the right or wrong thing to do in these times and it is easy to judge"*





# Concerns for the health and safety of loved ones, financial income, job security and mental health have all increased this 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)

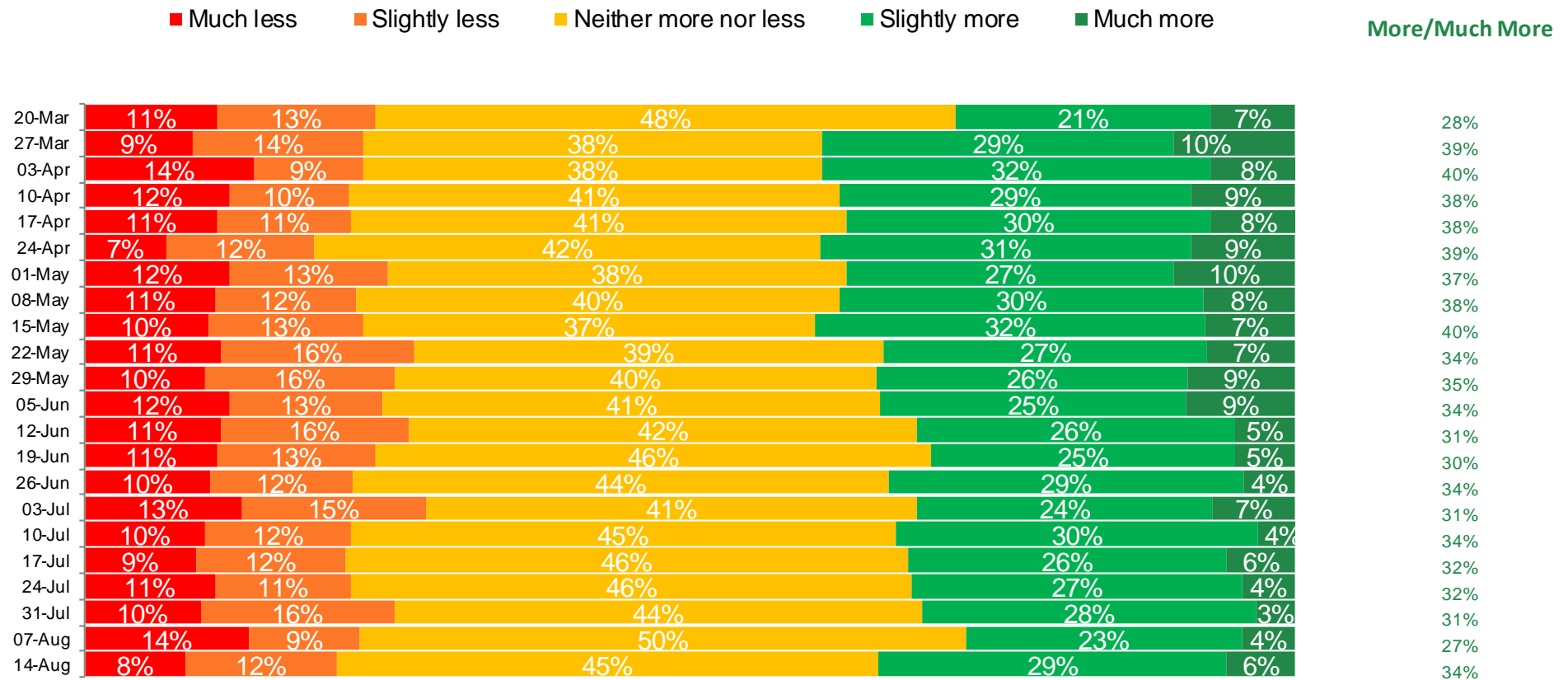


Source: OMD Radar Survey. 20/03: 488, 27/03: 480, 03/04: 503, 10/04: 501, 17/04: 501, 24/04: 500, 01/05: 500, 08/05: 500, 15/05: 500, 22/05: 500, 29/05: 500, 05/06: 500, 12/06: 500, 19/06: 500, 26/06: 500, 03/07: 500, 10/07: 500, 17/07: 250, 24/07: 250, 31/07: 250, 07/08: 250, 14/08: 250



# The number of people who report feeling more connected to their community compared to before the COVID-19 has increased 7ppts

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





# Similarly feeling more connected to friends and family compared to before the pandemic has increased this week

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

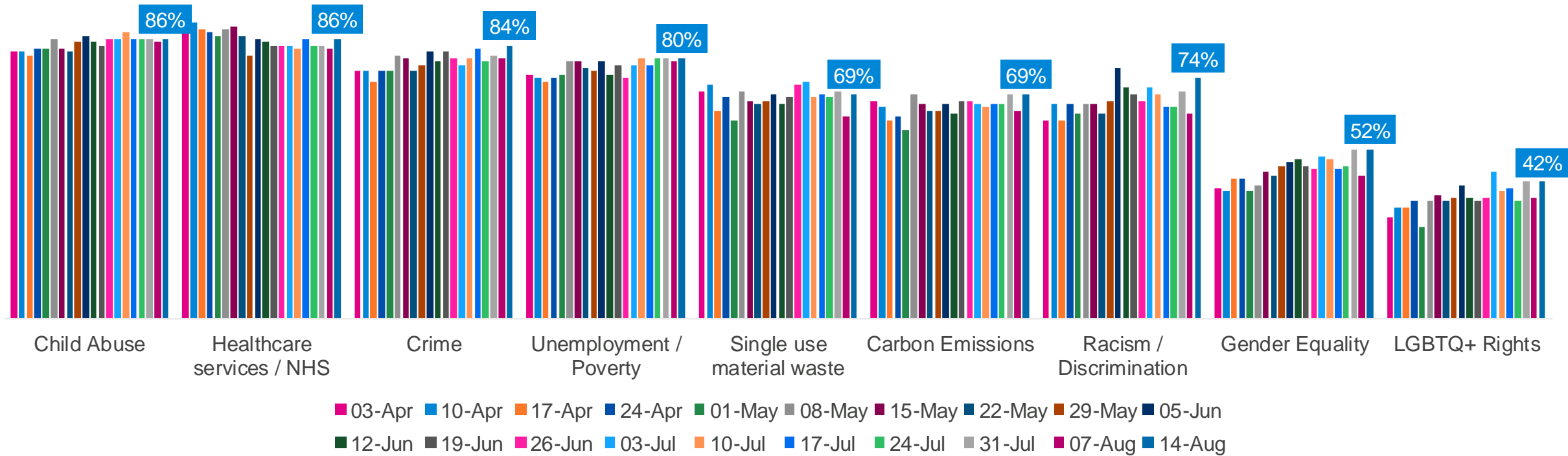






# Concerns over Healthcare services has increased 3ppts and concerns over Crime is up by 4ppts this week

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, 07/08:250, 14/08:250

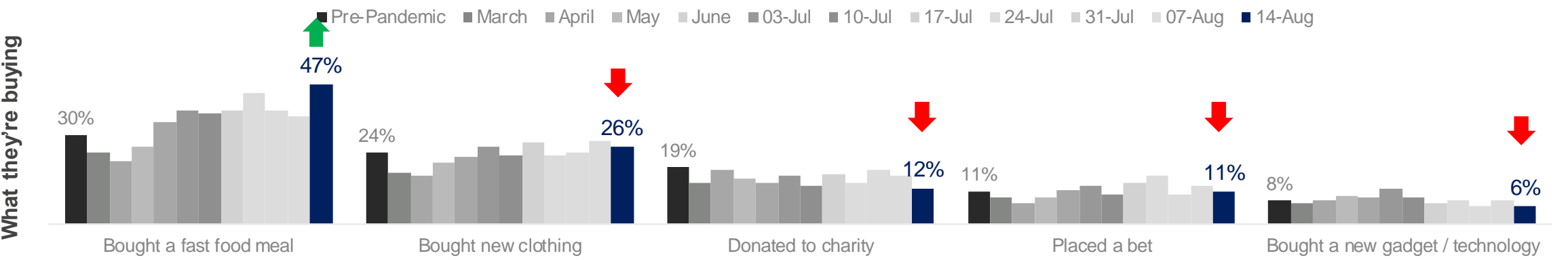
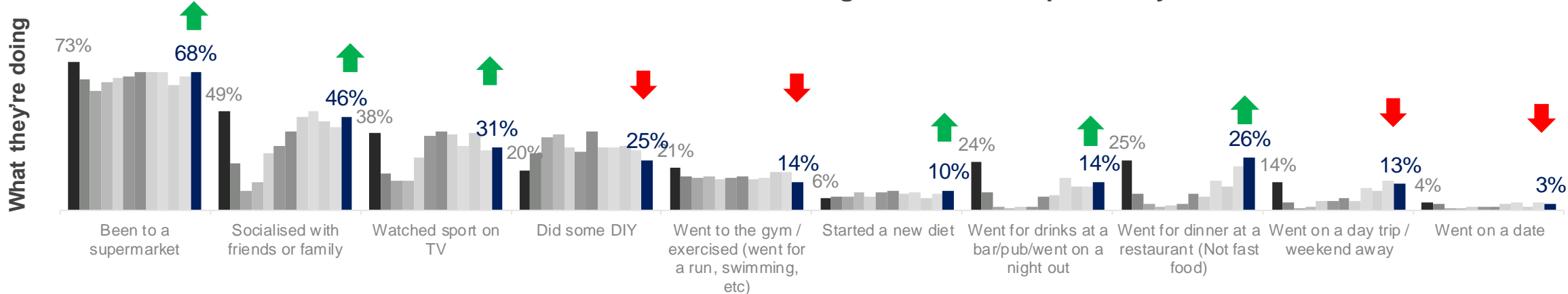


# Changes in Behaviour



# Socialising with friends & family has increased 5ppts and people continue to make use of the eat out to help out scheme as eating out increases 4ppts

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

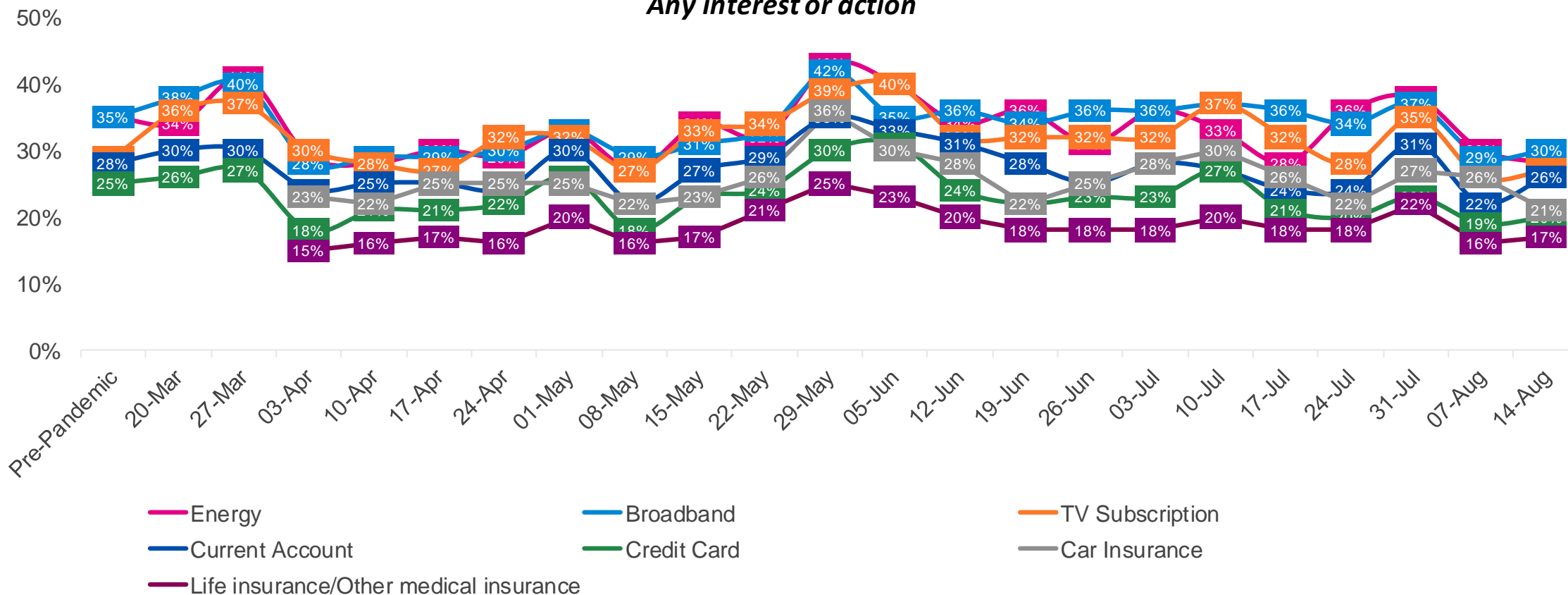


Source: OMD Radar Survey. Pre-Pandemic: 12,076, March: 1,716, April: 2,000, 08-May: 500, 15-May: 500, 22-May: 500, 29-May: 500, 05-June:500, 12-June:500, 19-June: 500, 26-June: 500, 03-July:500, 10-July:500, 17-July:250, 24-July:250, 31-July:250, 07-August:250, 14-August:250



# There has been increases in people taking an interest in or action on their personal current account and credit card

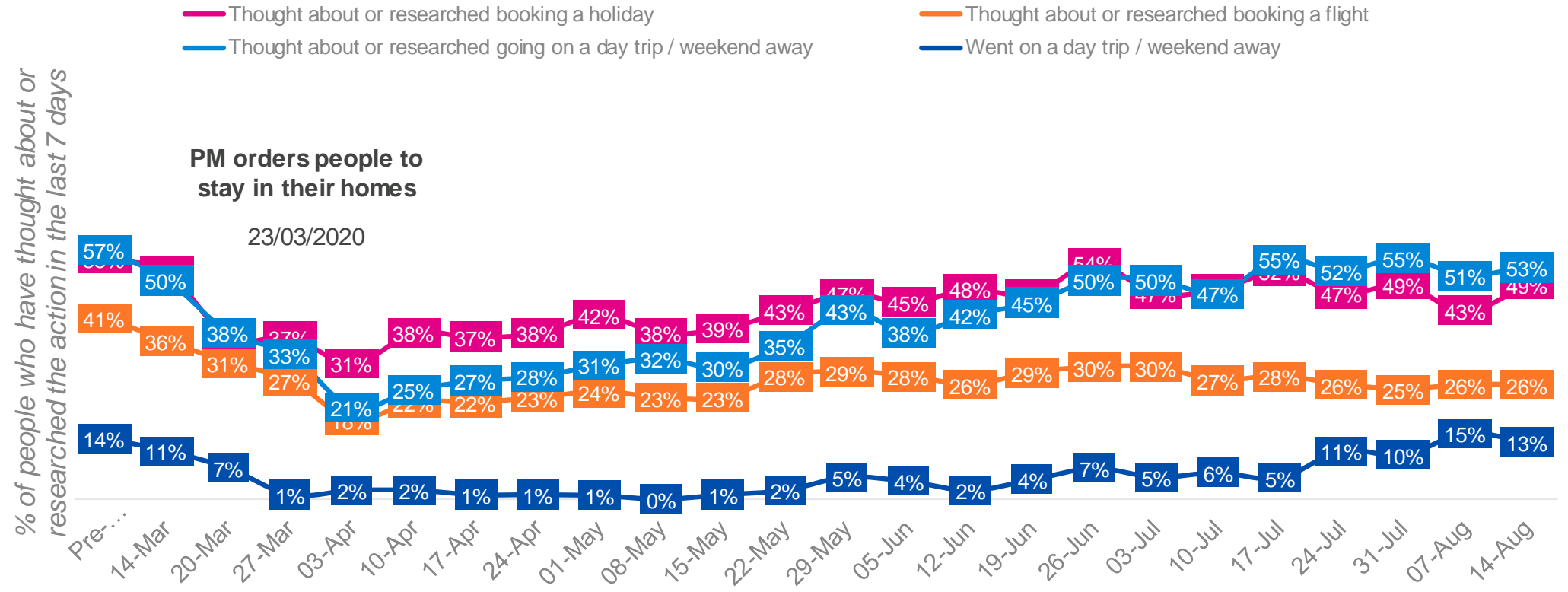
Have you talked about, researched, bought any of the following in the past 4 weeks?  
Any interest or action





# Despite new quarantine measures for people returning from France and the Netherlands, thinking about or researching booking a holiday has 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



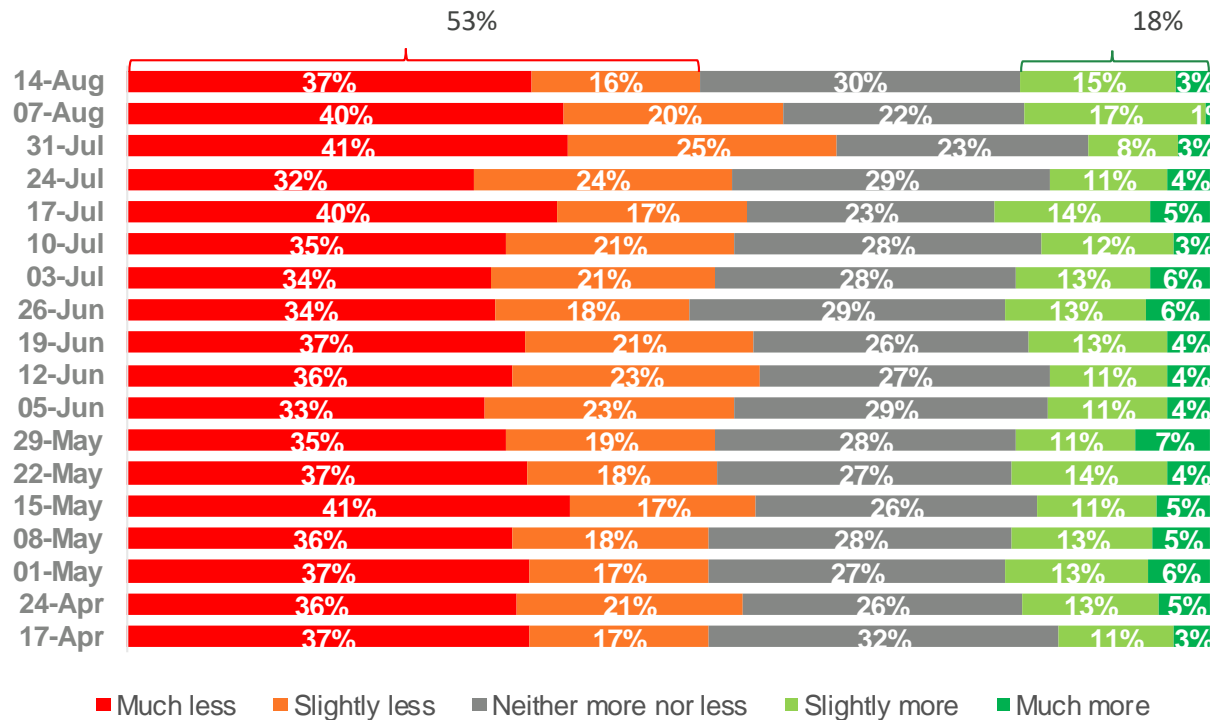
Source: OMD Radar Survey. Pre Pandemic - data from 18 Sept 2019 - 6 March 2020. n=5888. 13/03: 246 20/03: 488, 27/03: 480, 03/04: 503, 10/04: 501, 17/04: 501. 24/04: 501 01/05: 500, 08/05: 500, 15/05: 500, 22/05: 500, 29/05: 500, 05/06: 500, 12/06: 500, 19/06: 500, 26/06: 500, 03/07: 500, 10/07: 500, 17/07: 250, 24/07: 250, 31/07: 250, 07/08: 250



# Those predicting they will take less holidays over the next 12 months has decreased slightly as people show increased interest in UK holidays

People do not seem to be deterred by new rules in place on holiday-makers returning from certain countries as less people predict they will make less holiday plans in the next year, creating a divided picture between those keen to get away and those still too cautious to book

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



“Currently unsure when we will feel comfortable to go on holiday”

“There is too much uncertainty as can be seen with the recent addition of France to the no go list of countries.”

“We normally go on 3 overseas trips a year but have not booked anything yet due to the virus.”

“Last year we travelled to Cornwall for a week with the kids but this year we aren't having a family holiday, just a short couples camp away.

“It's important to try enjoy life with family and value freedom more after lockdown n being unable to do anything.”

“I have a holiday booked this September and am hoping this will go ahead”

“I have a holiday booked in the UK for next month”



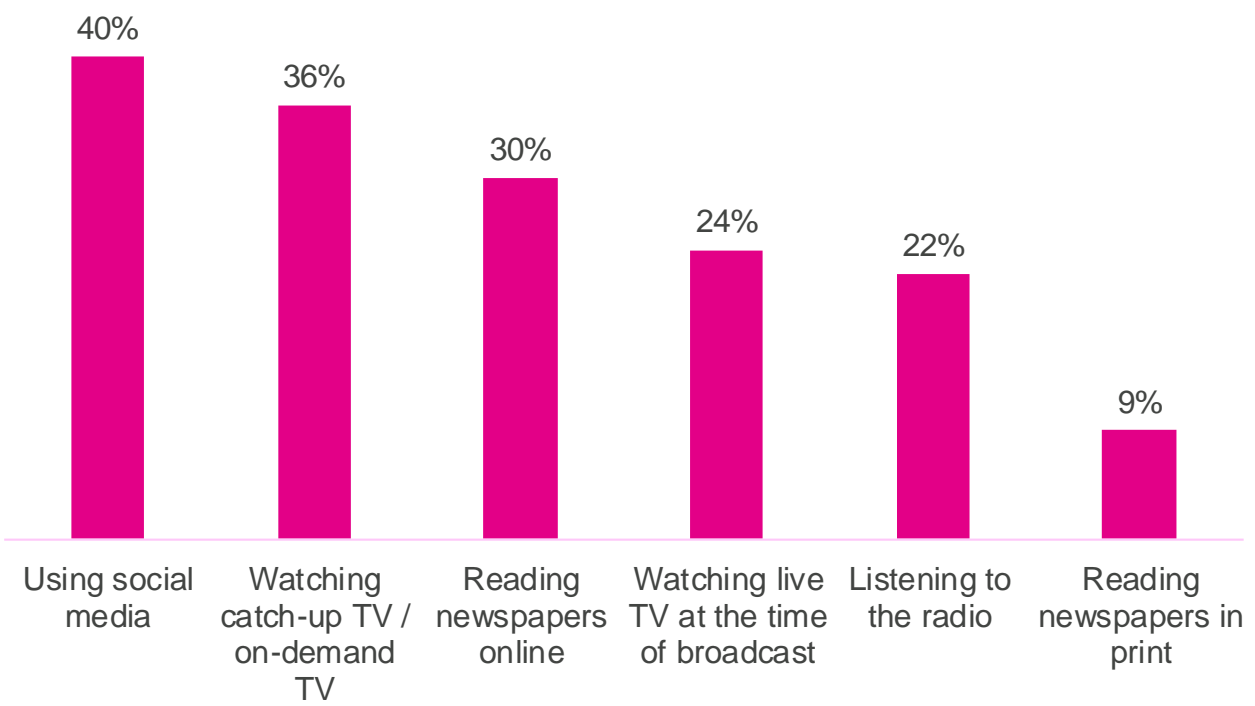
# Changes in Media Consumption

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

# With hot weather continuing, fewer people claim to be engaging with more media compared to before lockdown, decreasing across all channels apart from radio and live TV

- ↑ **22%** say they are consuming more radio than before lockdown began, 1ppt up from last week.
- Consuming more live TV at the time of broadcast has remained the same as last week, with **24%** claiming to be consuming more.
- ↓ However, catch-up or on-demand TV has decreased by 6ppt in the last 7 days – with **36%** claiming to be watching more catch-up TV than before lockdown.
- ↓ Increased use of social media has seen a notable dip this week, with **40%** saying that they are consuming social media more than before the pandemic, down 9ppts since last week.
- ↓ **30%** say they are consuming more newspaper articles or stories online/on a device, down from **34%** last week.
- ↓ Reading newspapers in print continued its decline WoW, with **9%** claiming to be reading more than before lockdown, down from **10%** last week and **16%** the week before (31-Jul).

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)



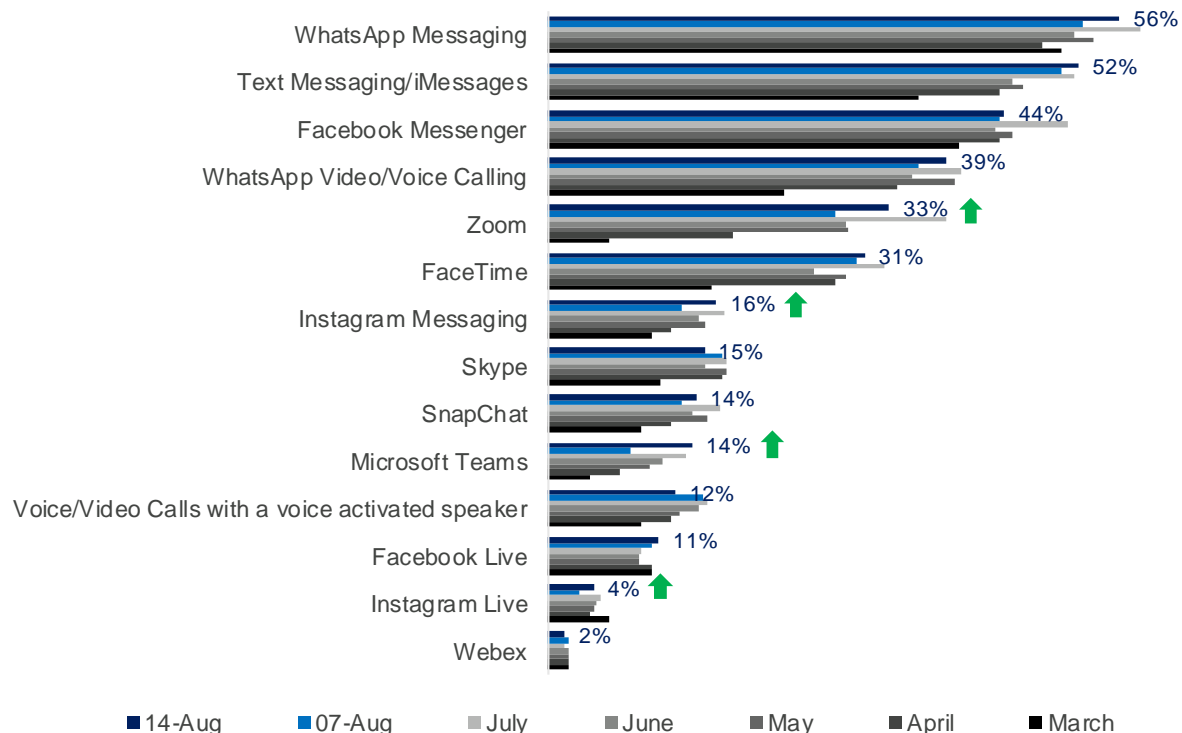




# There was a resurgence in virtual quizzing this week and increased use of group communication platforms, such as Zoom

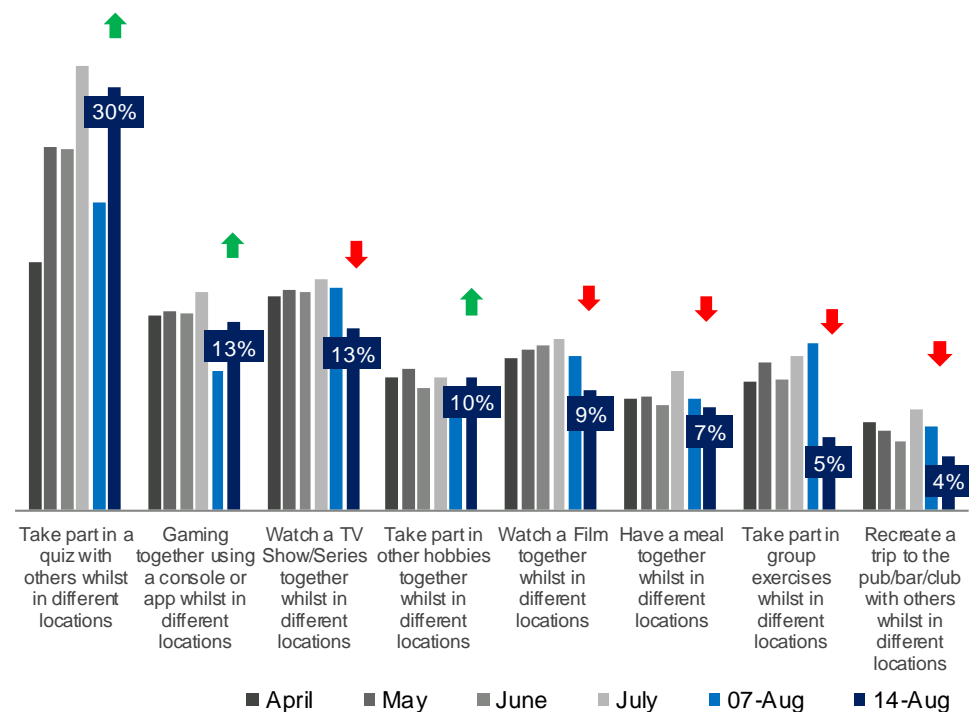
Use of group video call platforms, such as Zoom and Microsoft Teams, increased this week, as well as use of Instagram for communicating

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



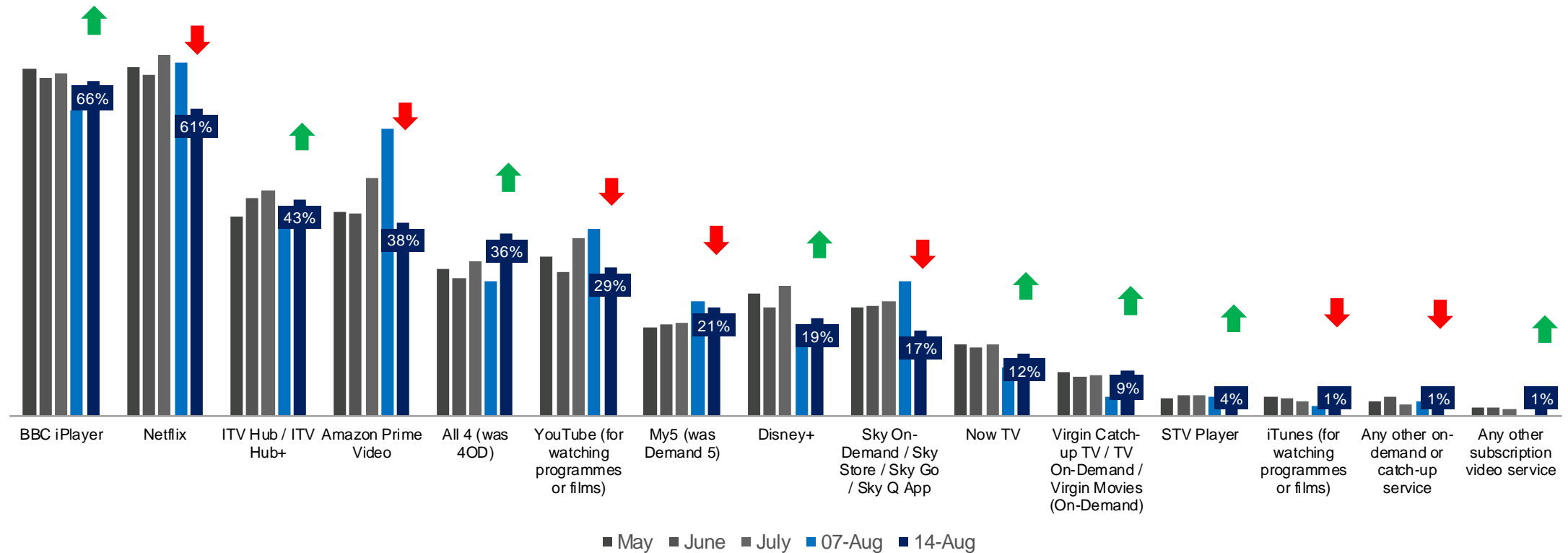
Quizzing experienced a notable increase this week but using technology for co-viewing experienced a decline this week

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



# Among those watching more catch-up TV or VoD, use of Amazon Prime Video and Sky's On-Demand services experienced the most significant decline in the last week

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

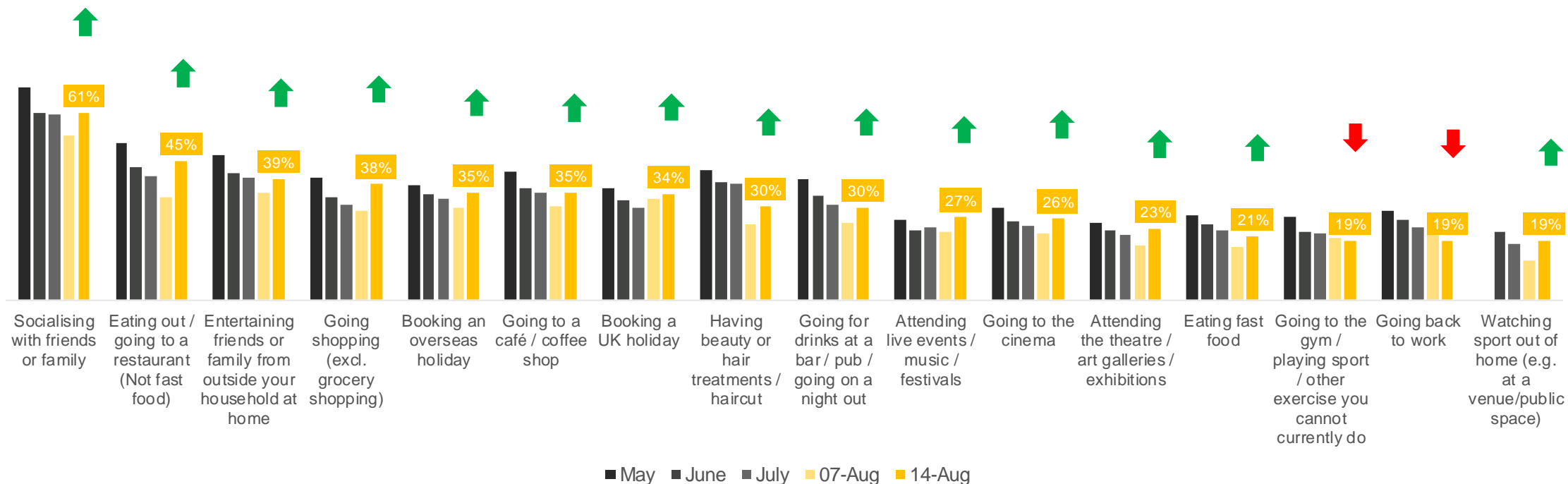




**Looking ahead**

# Anticipation for out of home activities experienced positive movement in the last 7 days - all activities, apart from going to the gym or returning to work, were more highly anticipated than last week

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)



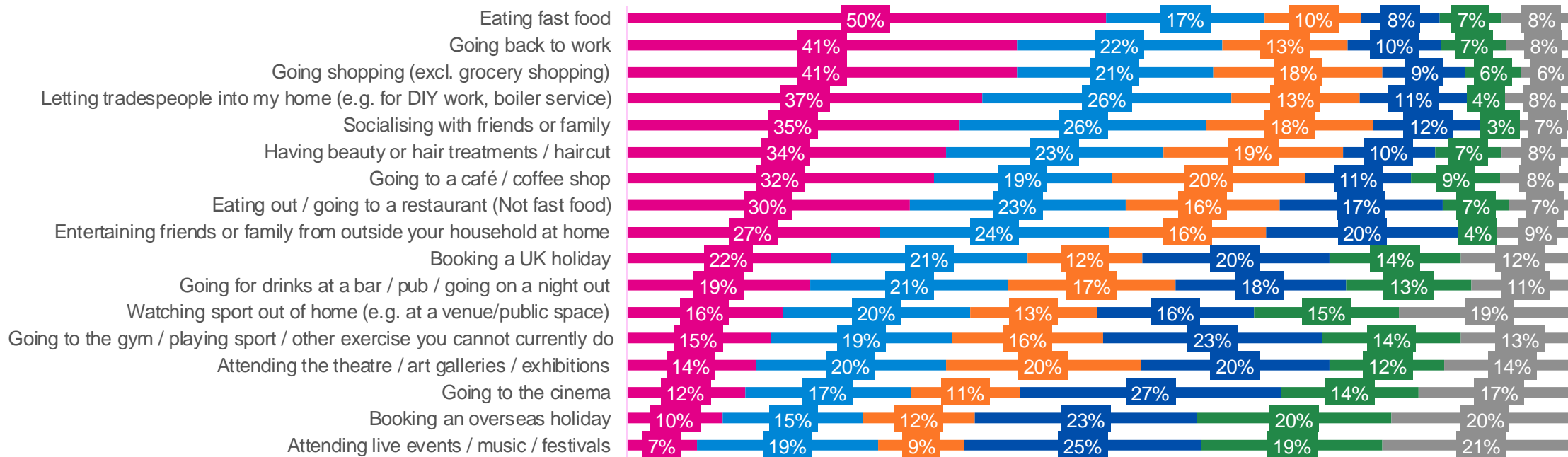


# The number of people that feel comfortable returning to out of home activities has decreased slightly across most activities this week

There has been a 2ppt decrease in people feeling comfortable returning to work, a 3ppt decrease in people feeling comfortable socialising with friends & family and a 1ppt decrease in people feeling comfortable going shopping

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

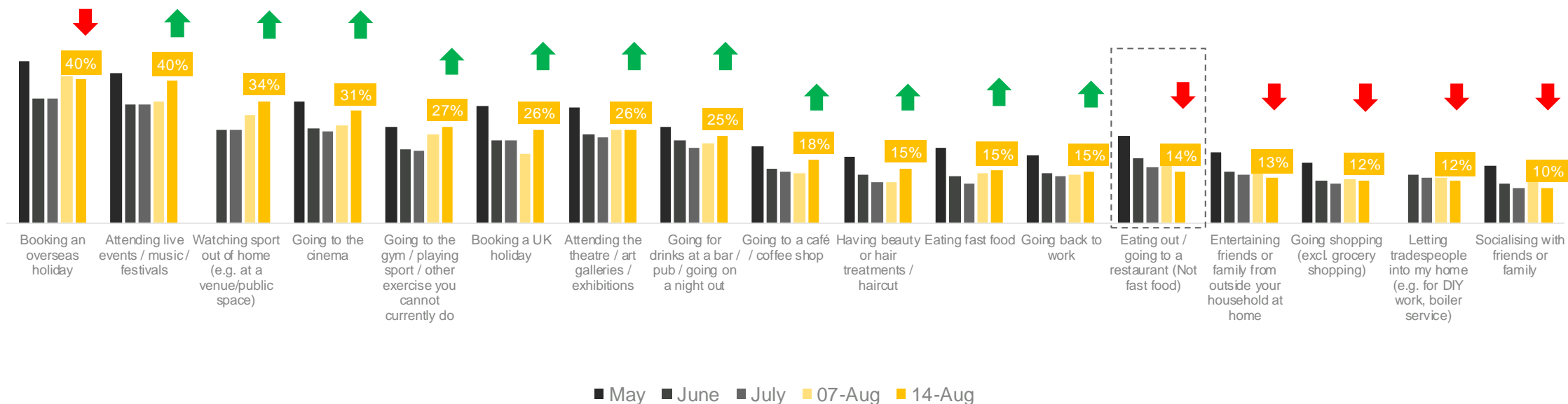
- I feel comfortable doing this now
- As soon as the government social restrictions are lifted
- Not until a few weeks after the restrictions are lifted
- Not until a few months after the restrictions are lifted
- Not until a proportion of the population has been vaccinated
- Not until my family and I have been vaccinated



# The number of people who would not feel comfortable doing outdoor activities until a vaccine is available has increased for most activities. However, it has decreased significantly for eating out – coinciding with the government’s Eat Out To Help Out initiative

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

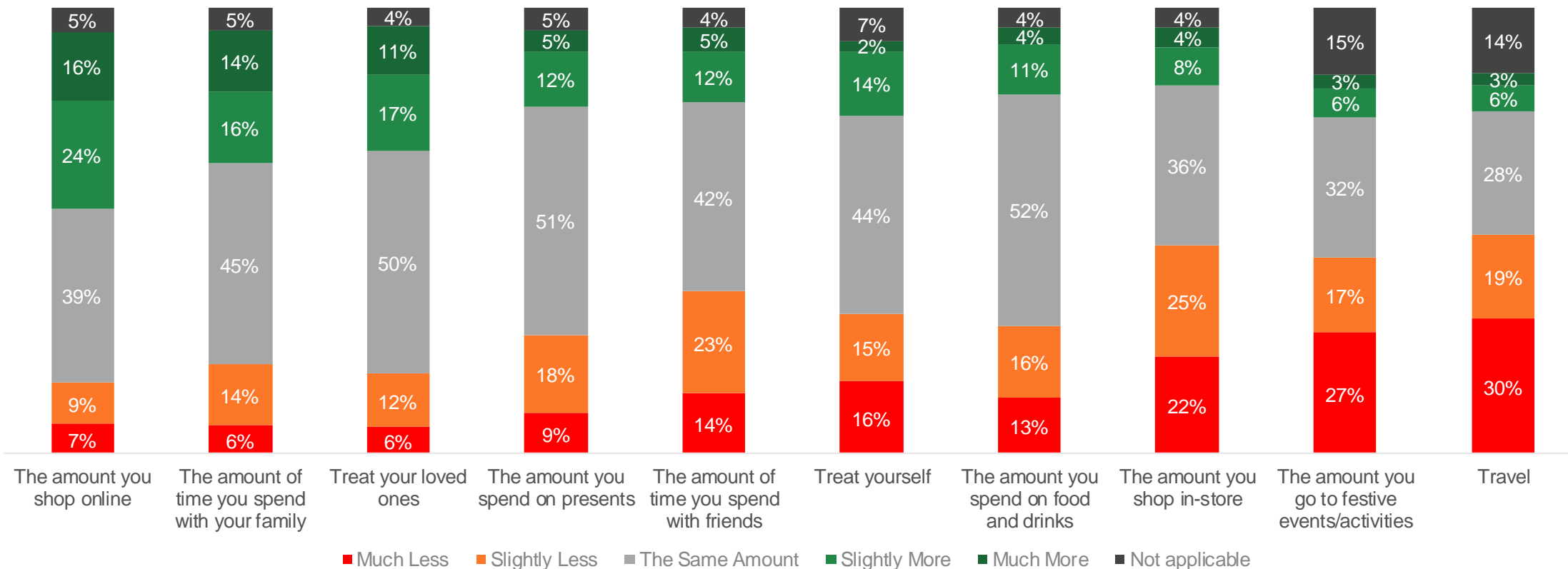
(Not until a significant proportion of the population has been vaccinated / Not until my family and I have been vaccinated)





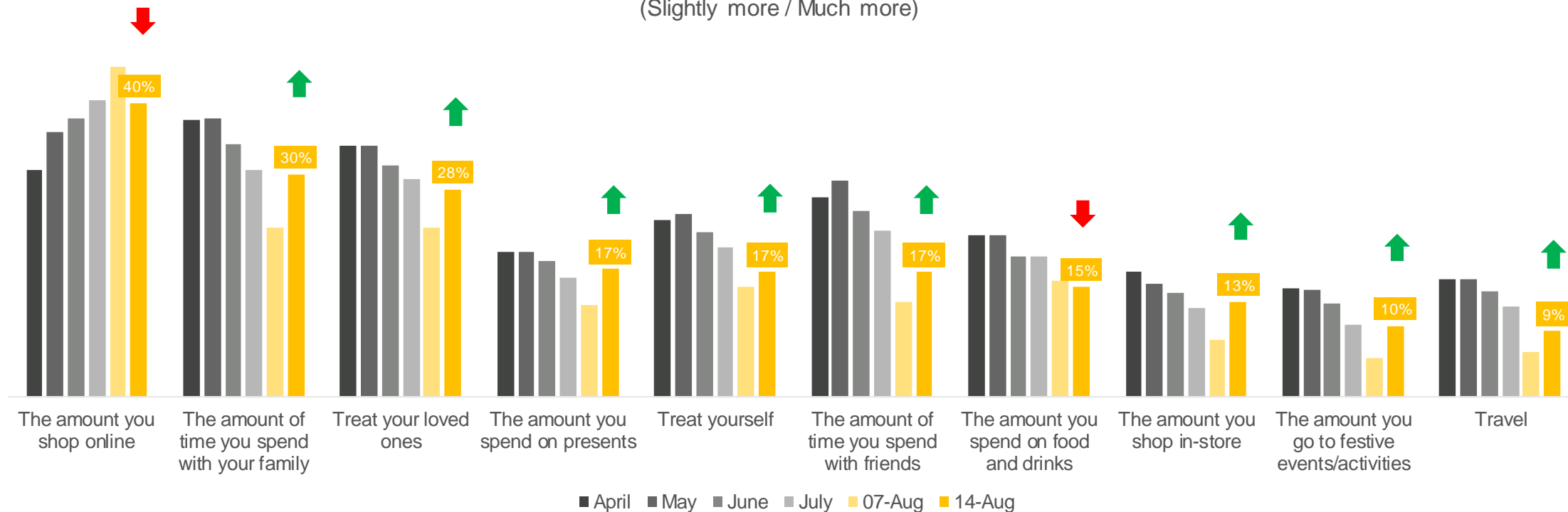
# 3 in 10 people intend to spend more time with their family at Christmas (up 7ppts this week)

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



# The role of others at Christmas saw an uplift this week, with increases in the number of people planning to spend more time with friends and family, treating loved ones more and 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



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

