

COVID-19 Consumer Impact Report
w/c 24.08.20

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 22,000 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 21st August to Sunday 23rd August 2020.

Summary: Happiness has now surpassed pre-pandemic levels, but concerns over financial stability are still apparent

- 01** **Happiness has now surpassed pre-pandemic levels**, increasing by 5ppts from 36% to 41%. Optimism has also seen some recovery, but still remains below pre-pandemic levels.
- 02** Growing levels of concern over personal financial income over the last 3 weeks has translated to **personal financial security seeing a significant dip of 8ppts this week**, taking it down to 35%.
- 03** **Confidence in the Government's response to the pandemic remains low at 30%**, with most still stating that the advice is inconsistent and ill-timed.
- 04** In a week of bad weather, **those taking advantage of the Eat Out Help Out scheme has dipped slightly this week**, but doing **DIY has seen a 6ppt increase**
- 05** Additionally, **media consumption has experienced uplift across most channels** in the last 7 days, after decreased use during a period of hot weather
- 06** Despite easing of lockdown rules, this week have seen **increases in the number of people that would not feel comfortable doing many of the activities that are currently permissible before a vaccine is available**



**Life satisfaction,
optimism & consumer
confidence**



The mood of the nation has taken a notable upturn in the last 7 days, with increases in happiness, optimism and satisfaction and decreased levels of anxiety



Happiness has bounced back to a higher level than pre-pandemic this week, increasing by 5ppts from 36% to 41%



Optimism has recovered from the lowest level recorded since the pandemic began, increasing from 14% to 18%, but still remains lower than pre-pandemic levels

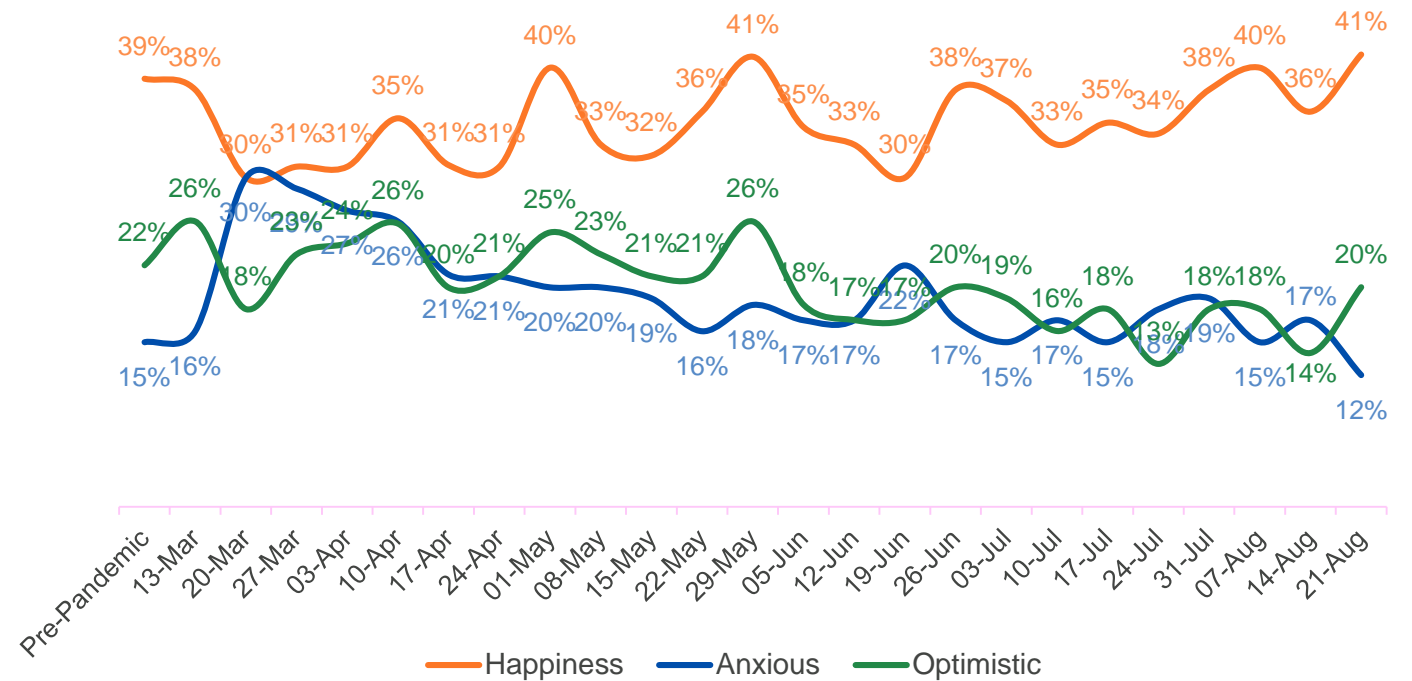


Life satisfaction has increased by 3ppts from 34% to 37%



Anxiety levels have decreased this week, from 17% to 12%

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





Feeling financially secure has dropped after back-to-back weeks of improvement but confidence in business has experienced a considerable uplift



Feeling financially secure has decreased 8ppts from 43% to 35%

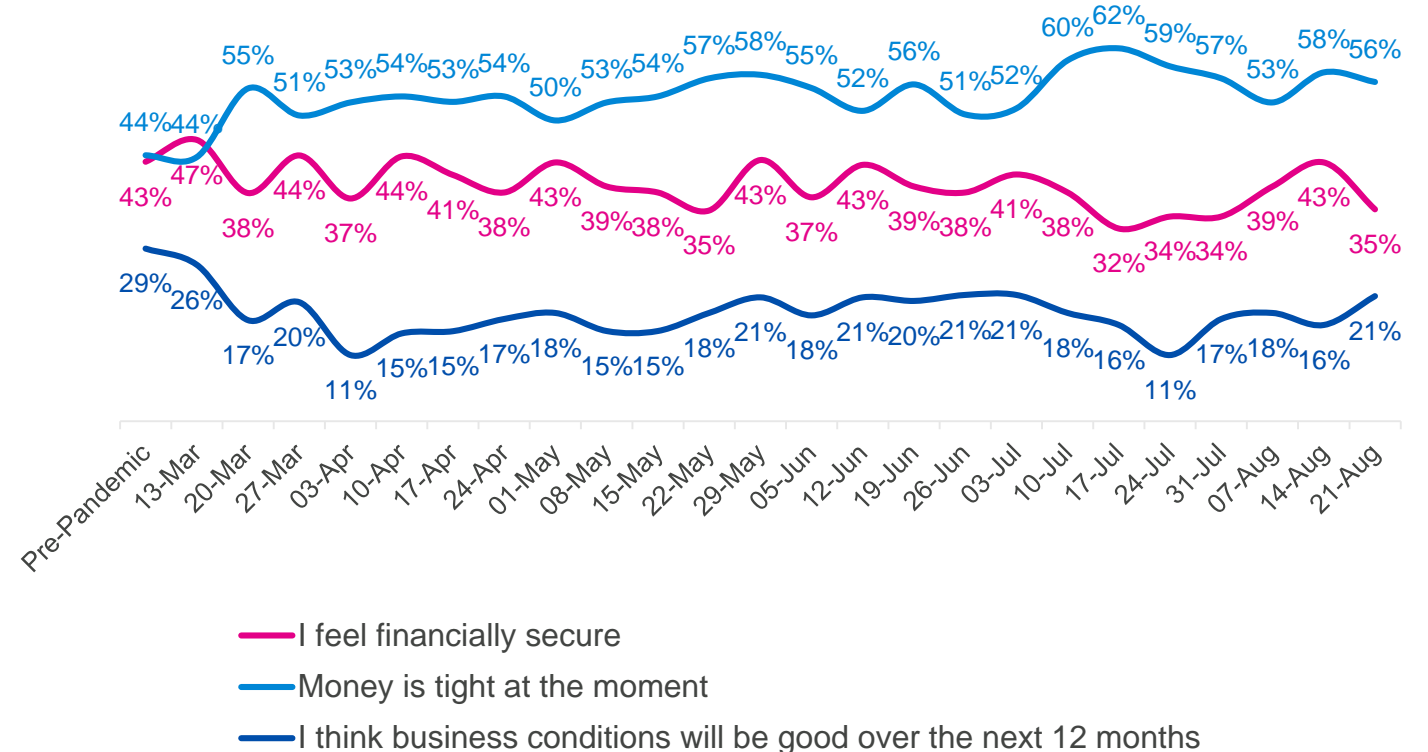


The number of people reporting that **money is tight** at the moment decreased this week by 2ppts from 58% to 56%.



Confidence in future business conditions has increased this week from 16% to 21%

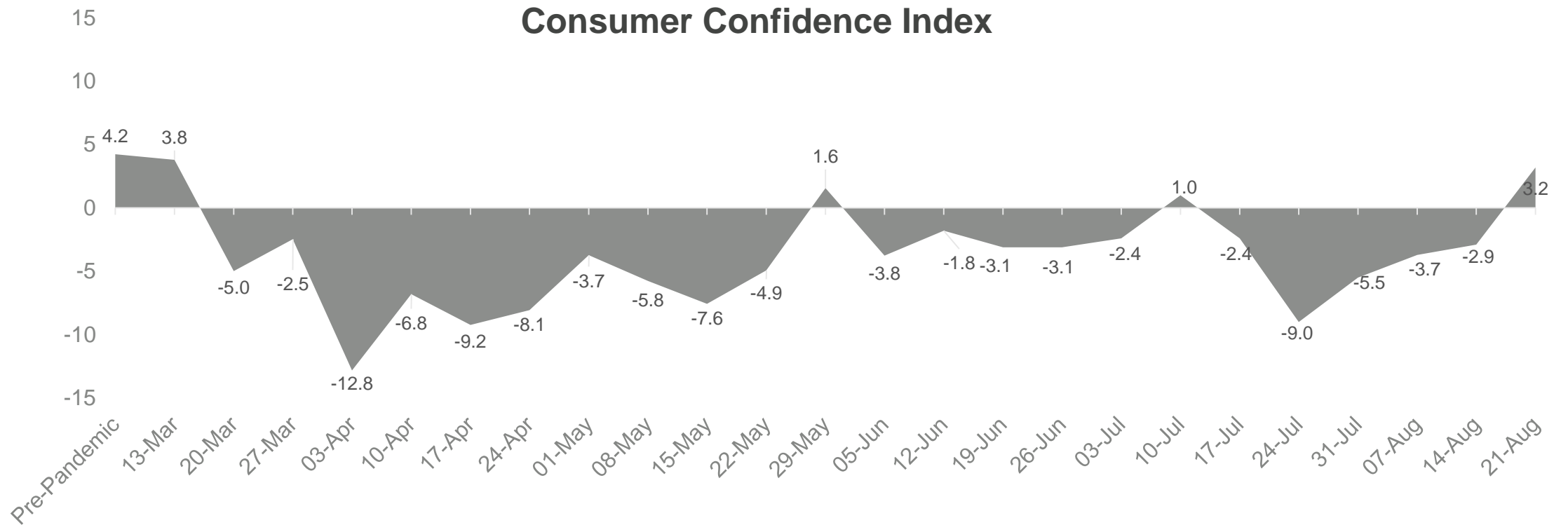
To what extent do you agree with the following statements?
(0=Not at all, 10=Completely)
% selecting top 3 (8-10)



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, 07/08:250, 14/08:250, 21/08:250



Consumer confidence has improved considerably in August, up 12.2 points since 24th July



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.



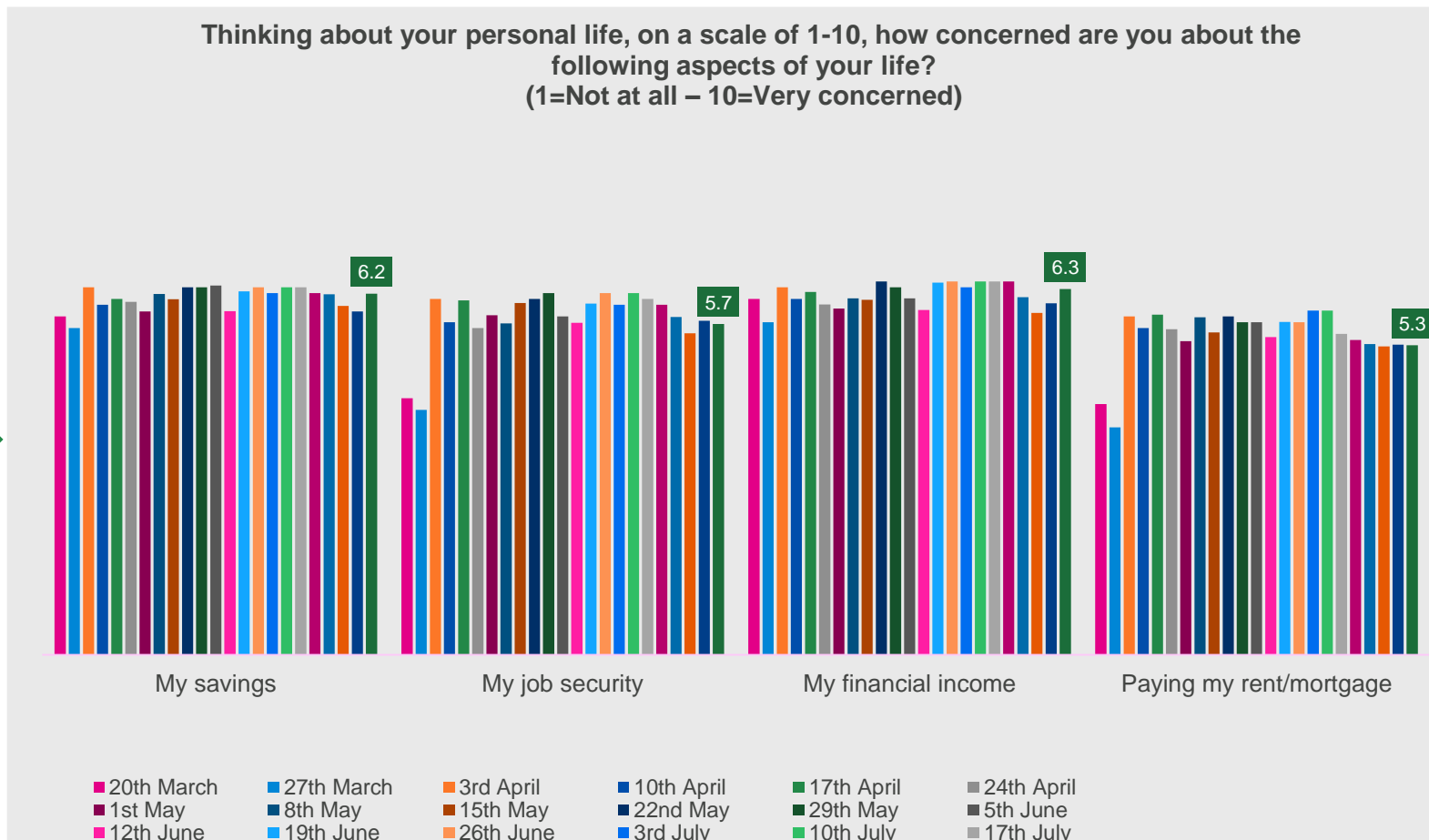
However, there have been growing levels of concern over personal financial income over the last 3 weeks

18% of households have someone that has been **furloughed**

8% of households contain someone that has had their **salary reduced** since the COVID-19 outbreak

9% 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

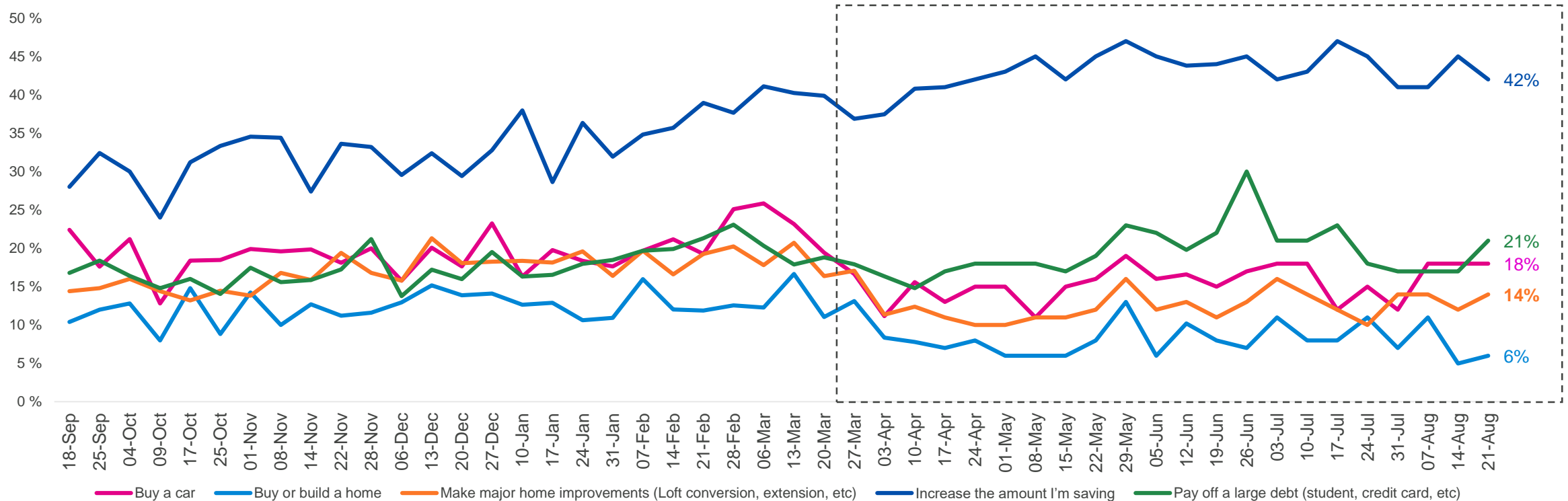




Intent to increase savings saw a decline this week, which reflects the increased concern over personal savings

Plans to make major home improvements, buy or build a home or pay off a large debt have increased in the last week

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



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



Confidence in the government's response has dropped 3ppts this week

Inconsistencies in their handling of the COVID-19 outbreak has been a common critique of the government

“Inconsistent responses; too many 'u-turns'; regularly changing interpretations of statistics; manipulating interpretations of policy/guidance to justify apparent abuse of said policy/guidance”

“Very slow to act at initial phase. Inconsistent policies. getting rid of PHS England is just going to allow them to sweep the failures under the carpet rather than allowing a proper enquiry after Covid has finished.”

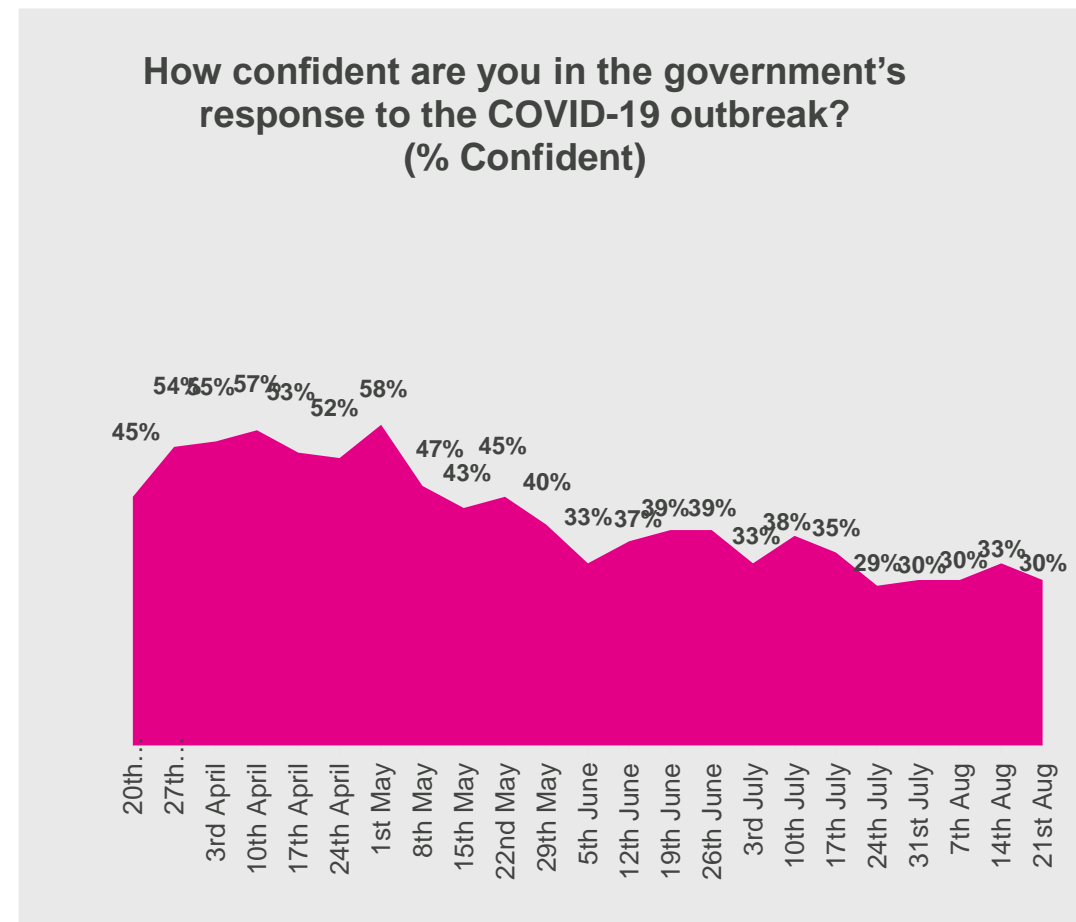
“Compared to other countries approach, the UK government had done an awful job of preventing the spread of coronavirus and we were put into lockdown much too late. Now they've eased restrictions so that almost everything is able to open again and they're telling us to prepare for a second wave of the virus.”

Those that report feeling confident say they are doing the best they can and it is the public that are at fault:

“They are doing all they can. Its the idiots walking the streets that are the problem..”

“I trust what the government are doing but too many people are not following the government guidance”

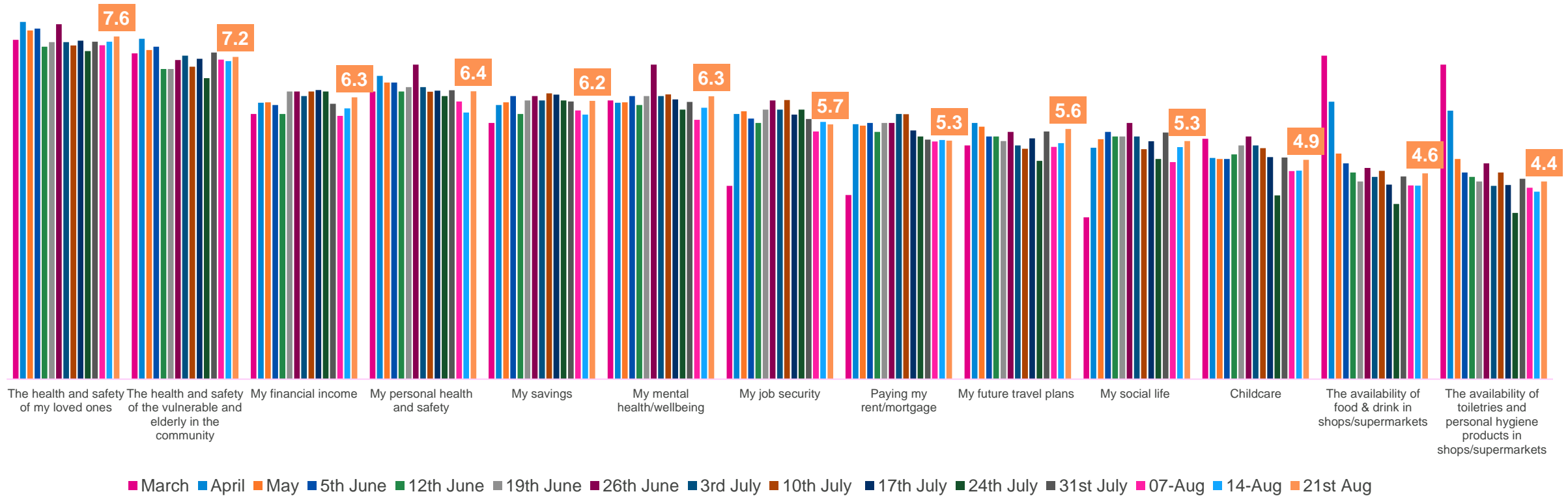
“People do not follow the guidelines”





Concerns for personal health and safety and the safety of loved ones has increased again 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)

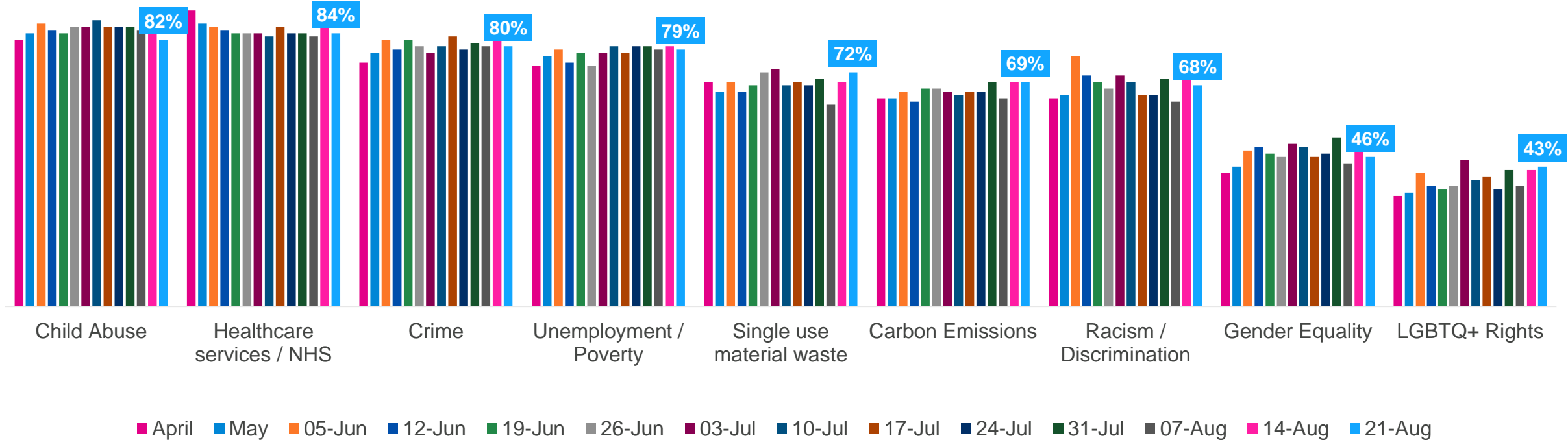


Source: OMD Radar Survey. 20/03: 488, 27/03: 480, 03/04: 503, 10/04: 501, 17/04: 501, 24/04: 500, 01/05: 500, 08/05: 500, 15/05: 500, 22/05:500, 29/05: 500, 05/06: 500, 12/06: 500. 19/06: 500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250



Concerns across all societal issues have decreased this wave with the exception of environmental concerns

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

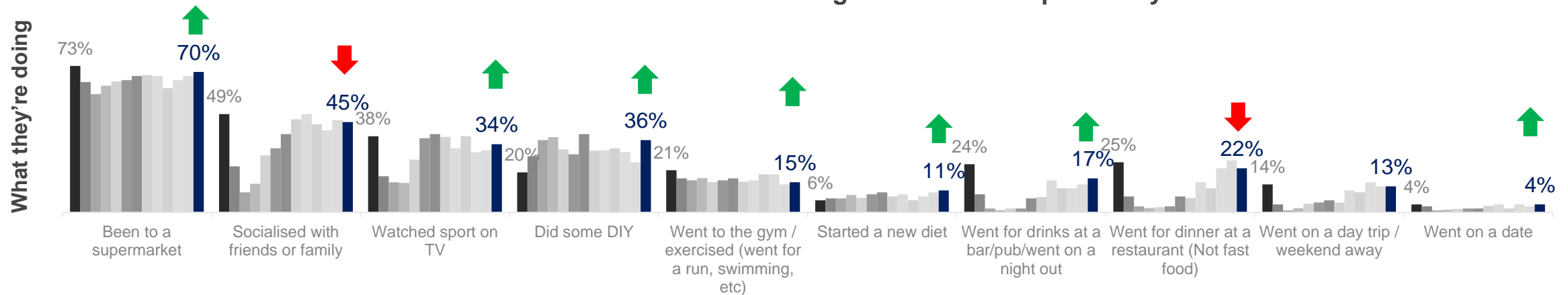


Changes in Behaviour

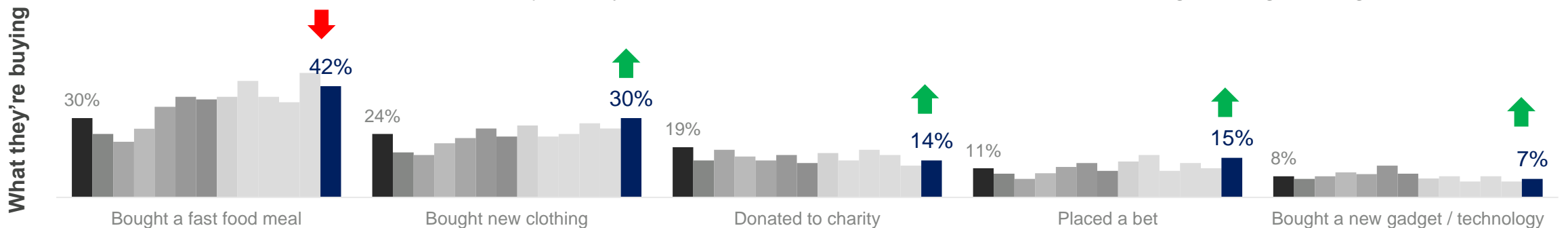


Those taking advantage of the Eat Out Help Out scheme has dipped slightly this week, but doing DIY has seen a 6ppt increase

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



Legend: Pre-Pandemic, March, April, May, June, 03-Jul, 10-Jul, 17-Jul, 24-Jul, 31-Jul, 07-Aug, 14-Aug, 21-Aug

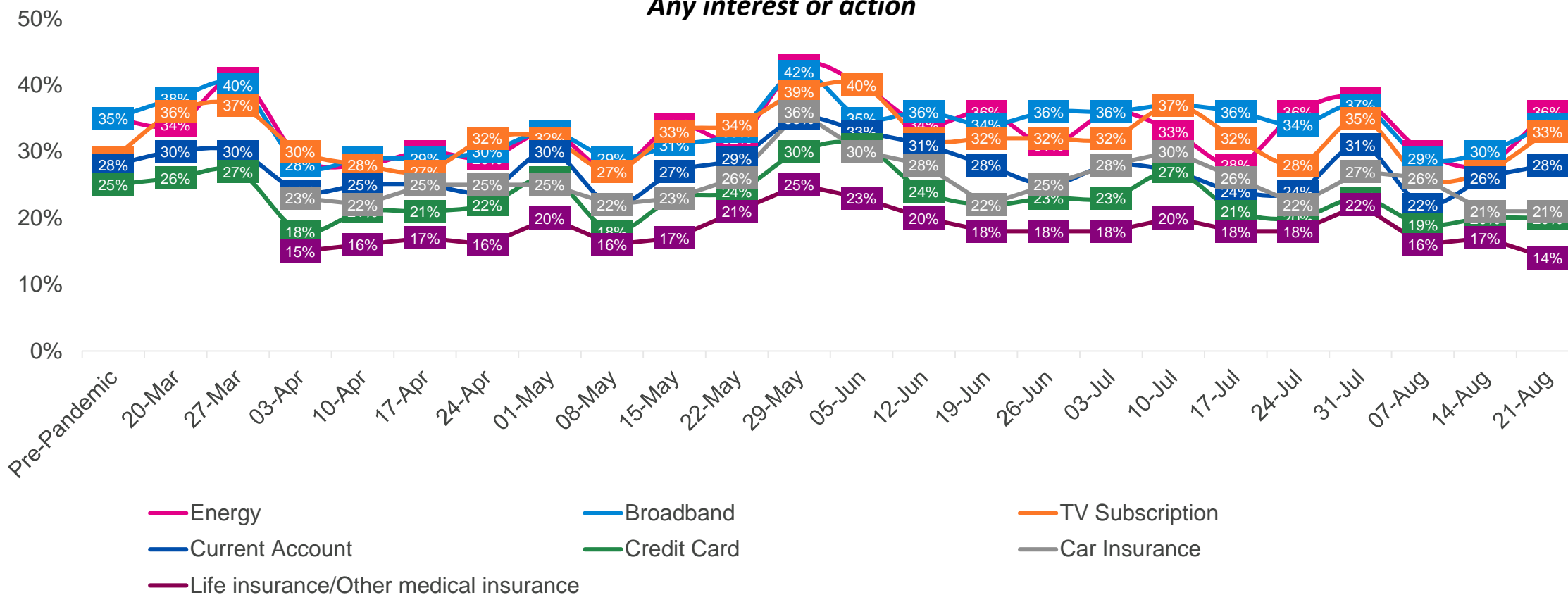


Source: OMD Radar Survey. Pre-Pandemic: 12,076, March: 1,716, April: 2,000, 08-May: 500, 15-May: 500, 22-May: 500, 29-May: 500, 05-June:500, 12-June:500, 19-June: 500, 26-June: 500, 03-July:500, 10-July:500, 17-July:250, 24-July:250, 31-July:250, 07-August:250, 14-August:250, 21-August:250



There have been increases in people taking an interest in or action on their subscriptions and services including current accounts

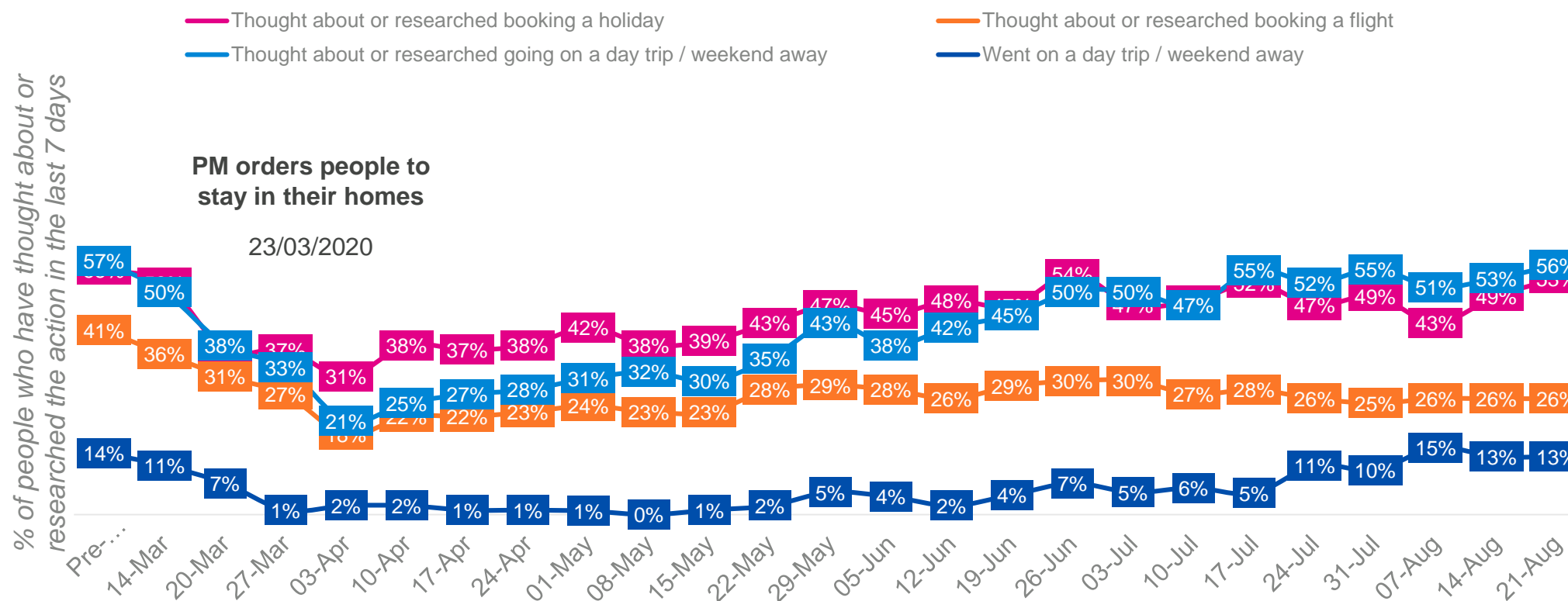
Have you talked about, researched, bought any of the following in the past 4 weeks?
Any interest or action





Thinking about or researching booking a holiday or a day trip/weekend away has increased 4ppts and 3ppts respectively

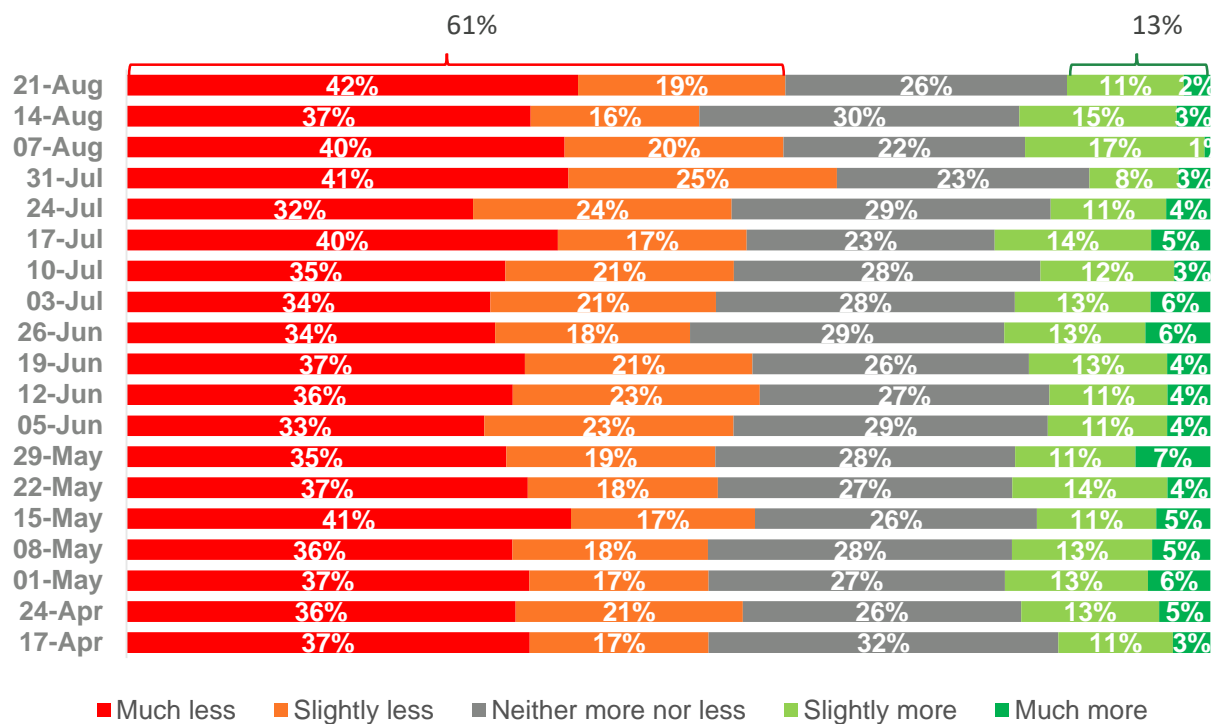
Looking at the different activities listed below, in the past 7 days which have you thought about and or researched if at all?
Which of the below, if any, have you done or have happened to you in the last 7 days? – Went on a day trip



As further quarantine rules are put in place there has been a spike in the number of people who predict they will take less holidays in the next 12 months

The impact of the government's quarantine rules on holiday-makers returning from countries across Europe is evident with increasing numbers planning on taking less holiday over the next year

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



“It’s hard to plan anything, I’m afraid of quarantine”

“We had 2 holidays booked this year, but both were cancelled. We are wary of booking for 2021 in the current situation”

“Wont be taking any foreign holidays as I dont want to quarantine when I get back.”

“We used to go on holiday 4 times a year and now we are waiting to see the medium to long term impact of the virus before making any firm holiday plans..”

“I haven’t been able to go on holiday for the whole of this year and have saved money so in 2021 I will be trying to travel as much as possible (but safely).”

“I am very keen to start taking holidays again as soon as the situation allows”

“I need a break, I think we all are in need of one”



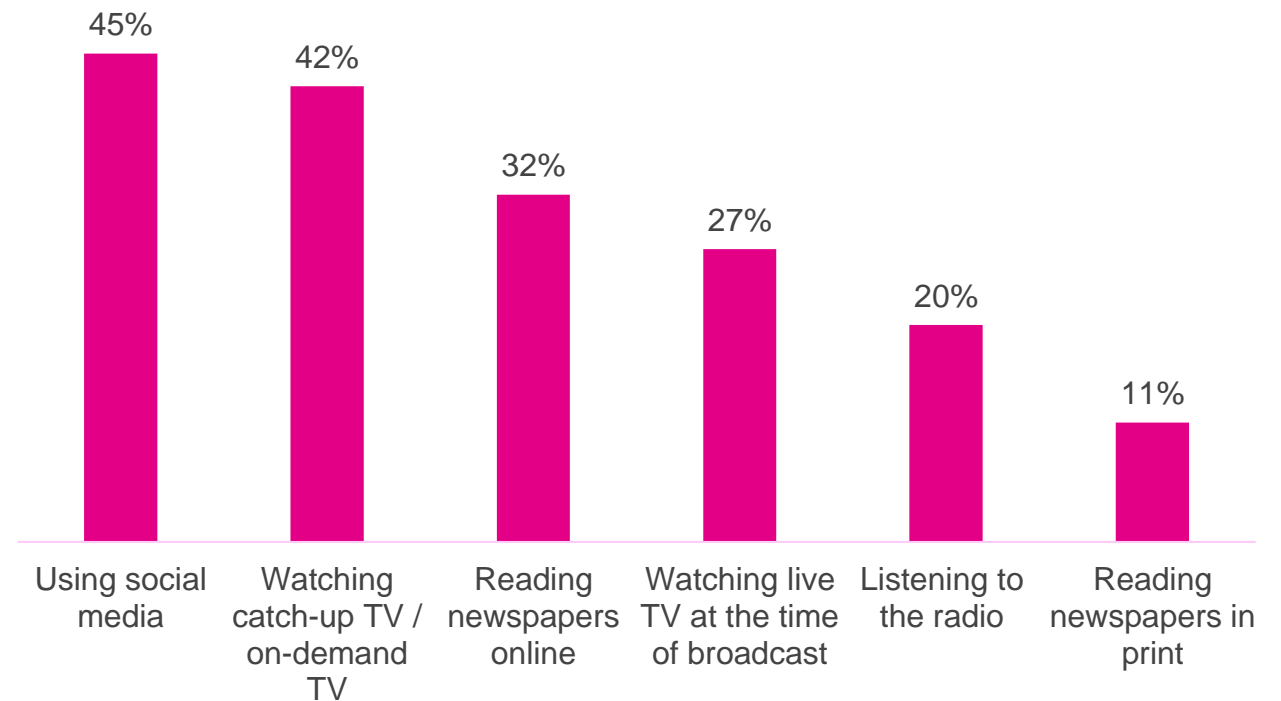
Changes in Media Consumption

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

Increased media consumption has experienced uplift across most channels in the last 7 days, after decreased use during a period of hot weather

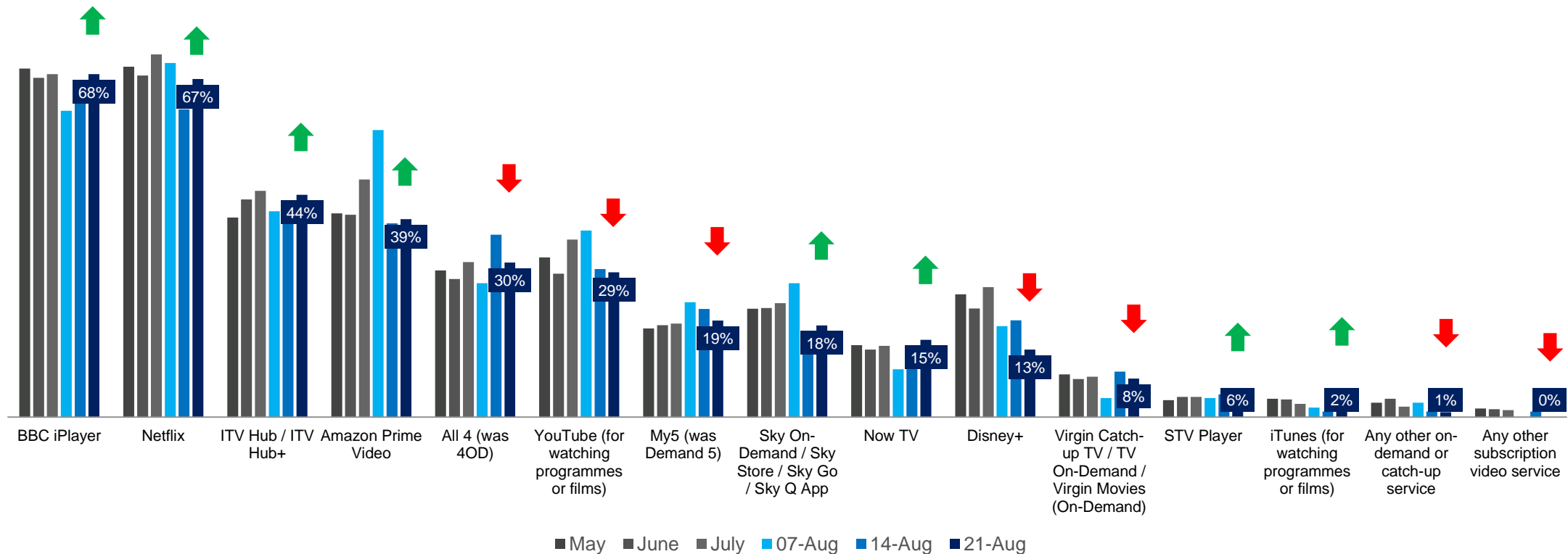
- ↑ Consuming more live TV at the time of broadcast has increased by **3ppt** in the last week, with **27%** claiming to be consuming more.
- ↑ Catch-up or on-demand TV has increased by **6ppt** in the last 7 days – with **42%** claiming to be watching more catch-up TV than before lockdown.
- ↑ Increased use of social media has increased by **5ppt** after a 9ppt dip the previous week, with **45%** saying that they are consuming social media more than before the pandemic.
- ↑ **32%** say they are consuming more newspaper articles or stories online/on a device, up from **30%** last week.
- ↑ Reading newspapers in print increased for the first time in August, with **11%** claiming to be reading more than before lockdown, up from **9%** last week and **10%** the week before (07-Aug).
- ↓ **20%** say they are consuming more radio than before lockdown began, **2ppt down** from last week.

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)



Among those watching more catch-up TV or VoD, BBC iPlayer and Netflix remain the most popular platforms and use of Disney+ saw a notable decline in the last 7 days

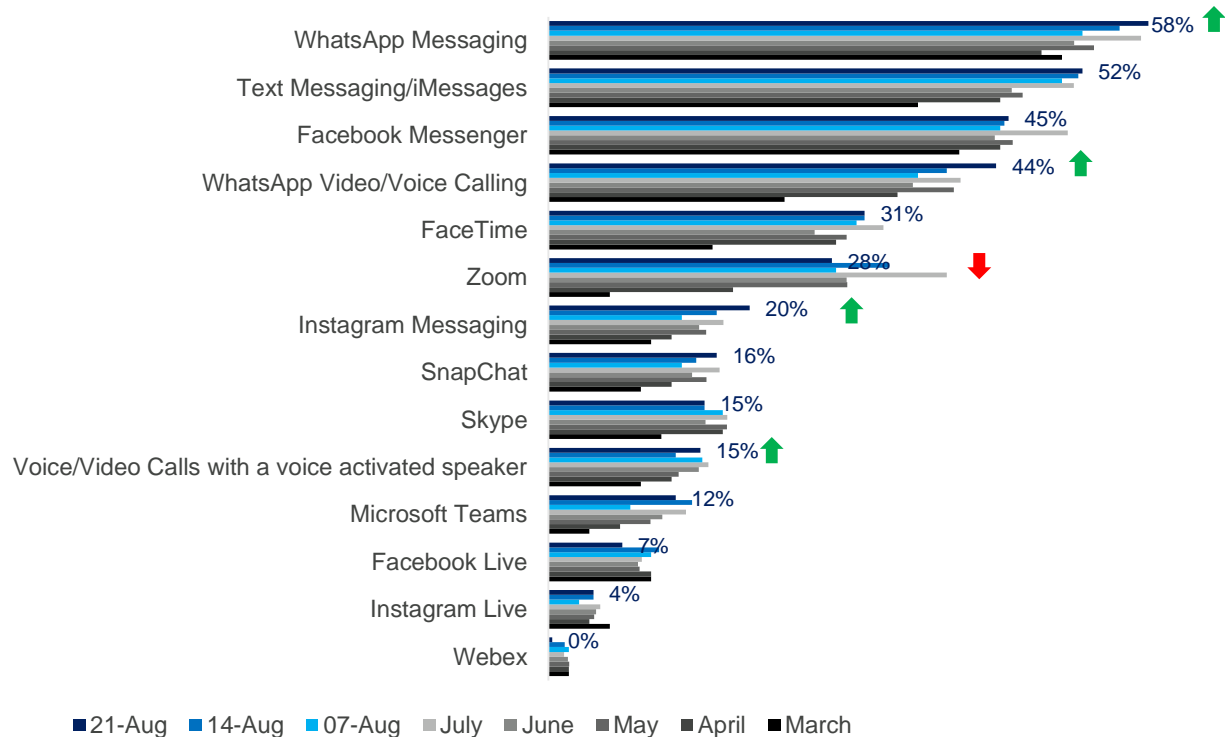
Which of the below catch-up TV or on-demand TV/video services have you been watching more of?



A drop in quizzing coincided with a drop in the number of people using Zoom

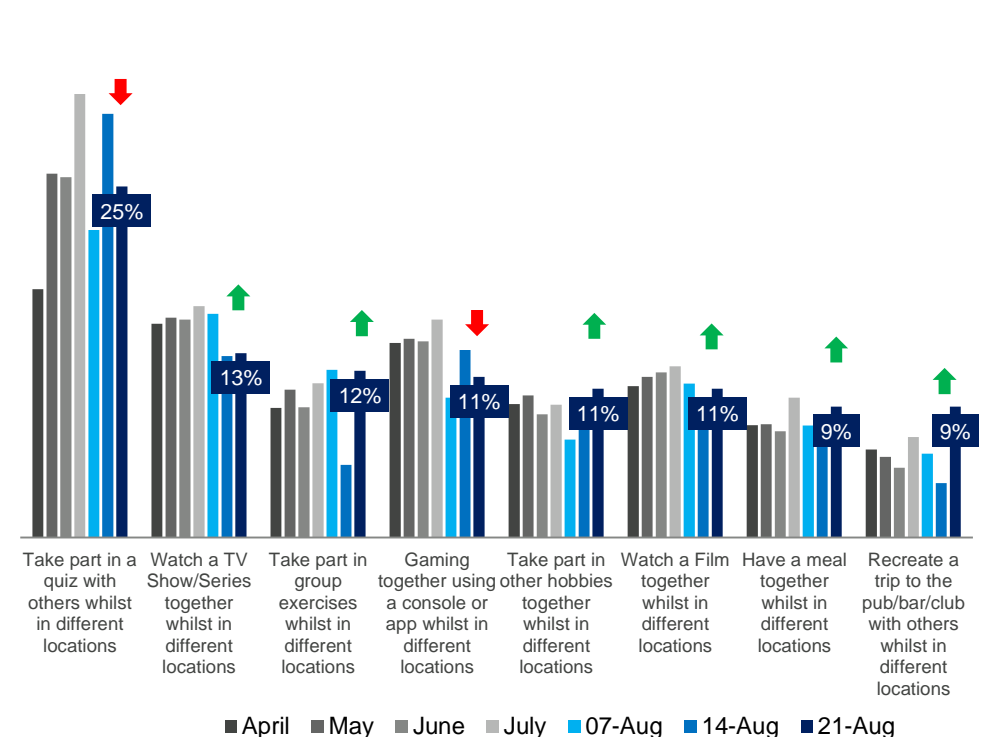
Use of WhatsApp increased this week, particularly video and voice calls using the service

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



Quizzing and gaming declined in the last 7 days after a brief uplift

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

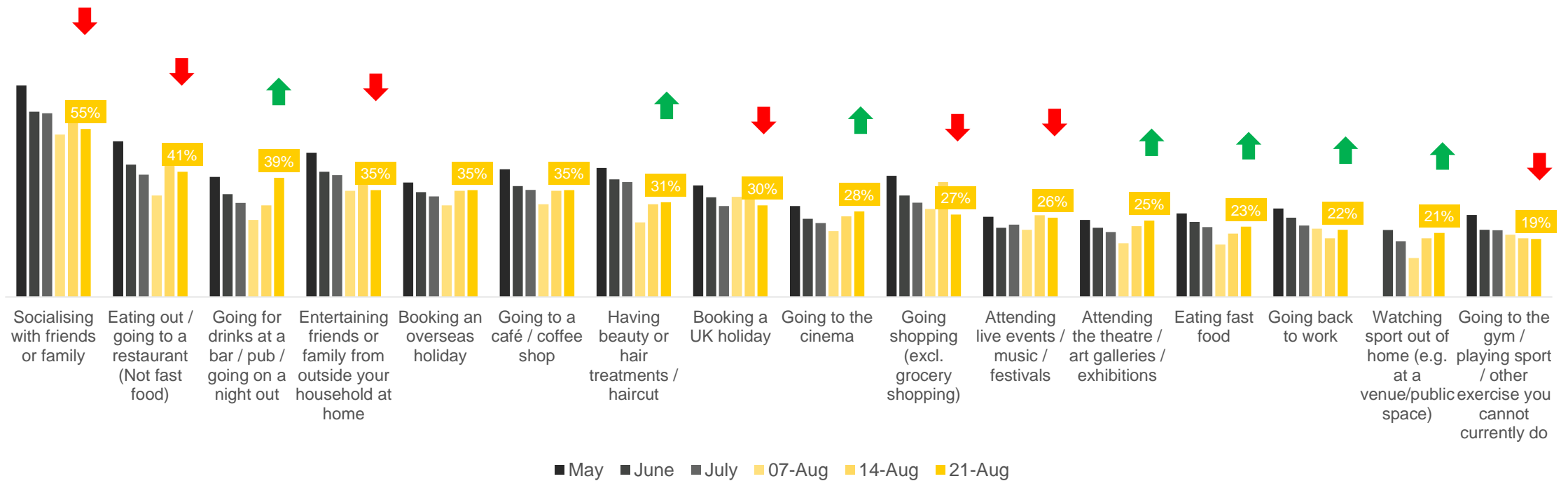




Looking ahead

Anticipation to eat out decreased this week after a notable uplift 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)

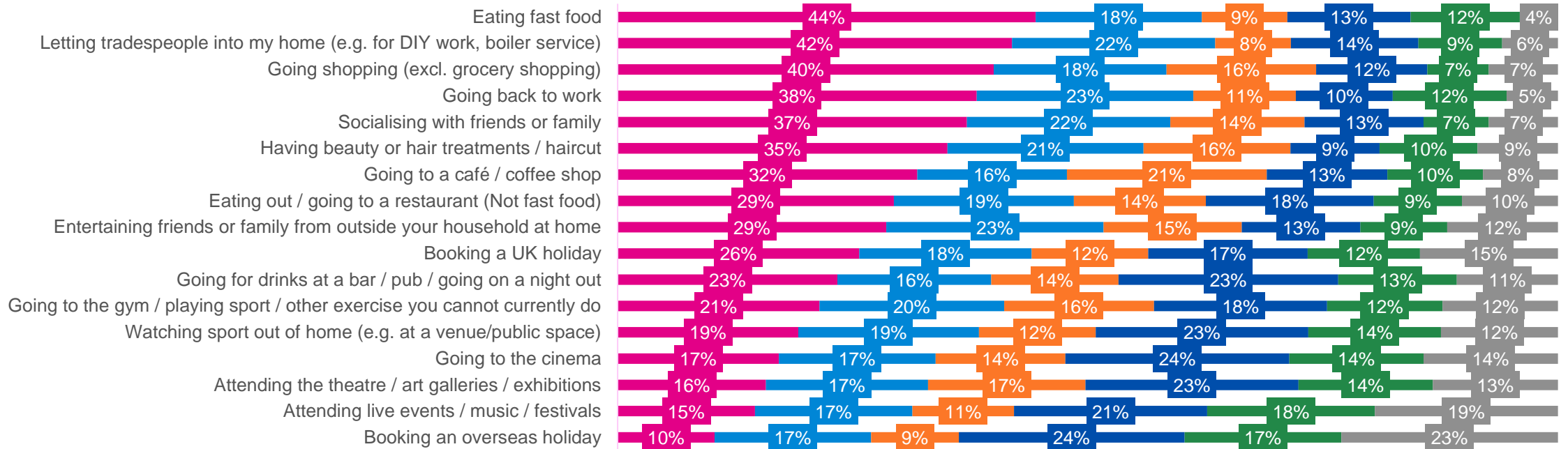


There has been an 4ppt increase in the number of people that feel comfortable booking a UK holiday

There has been a 5ppt increase in feeling comfortable going to the cinema, a 6ppt increase in feeling comfortable going to the gym but a 3ppt decrease in people feeling comfortable returning to work

When would you feel comfortable doing the following again?

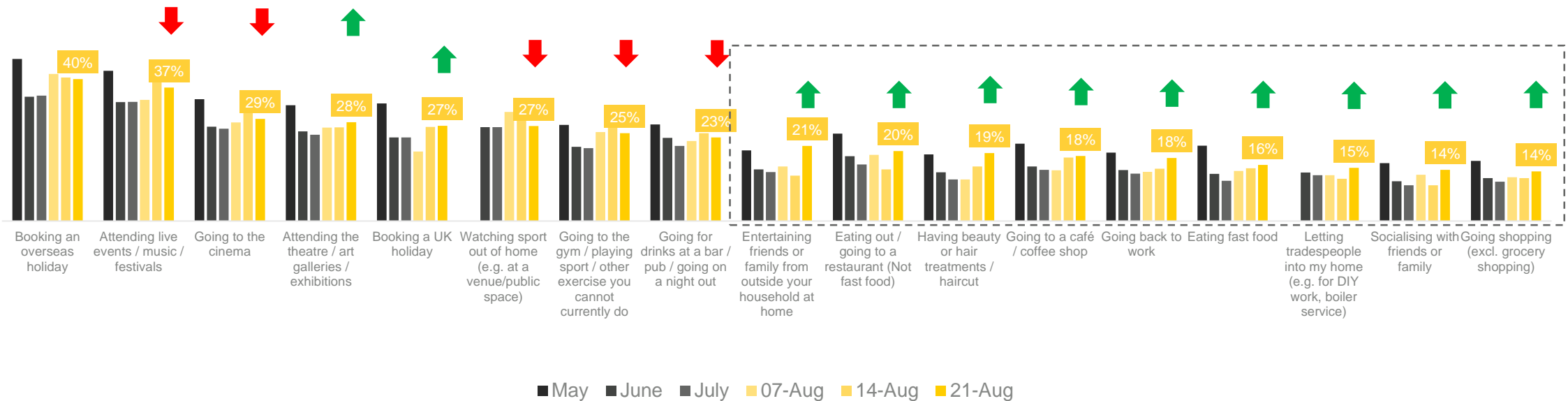
- I feel comfortable doing this now
- As soon as the government social restrictions are lifted
- Not until a few weeks after the restrictions are lifted
- Not until a few months after the restrictions are lifted
- Not until a proportion of the population has been vaccinated
- Not until my family and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



There have been increases in the number of people that would not feel comfortable doing many of the activities that are currently permissible before a vaccine is available

When would you feel comfortable doing the following again?

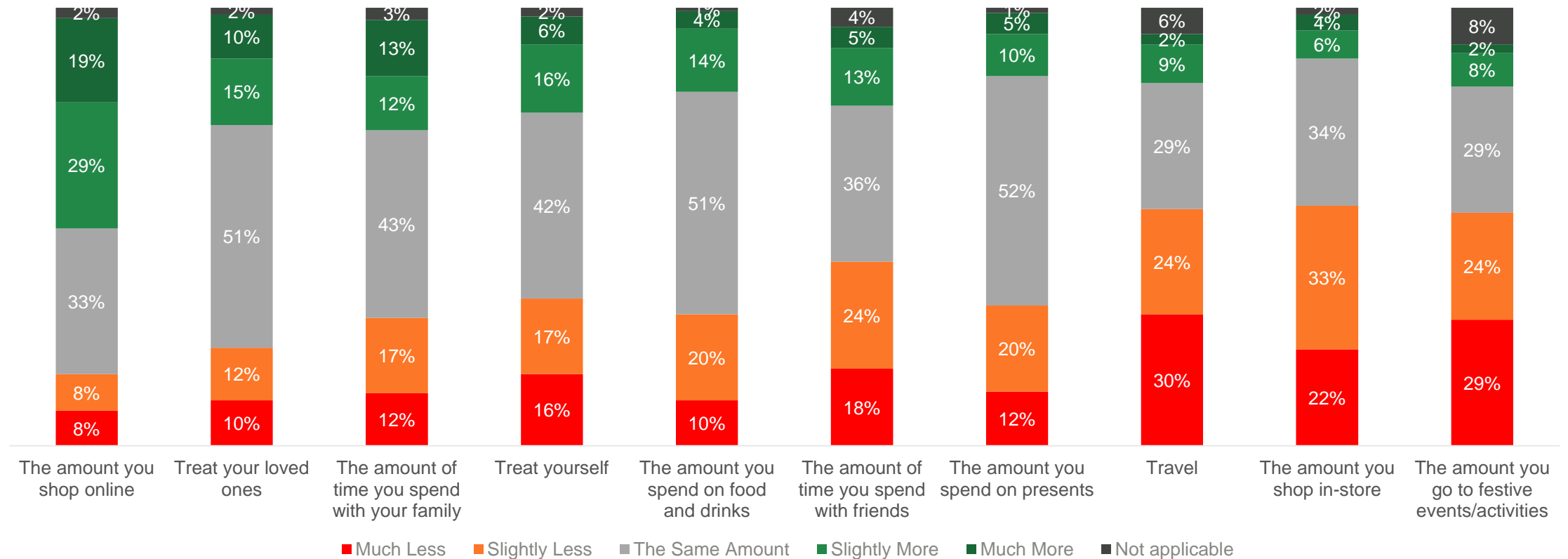
(Not until a significant proportion of the population has been vaccinated / Not until my family and I have been vaccinated)





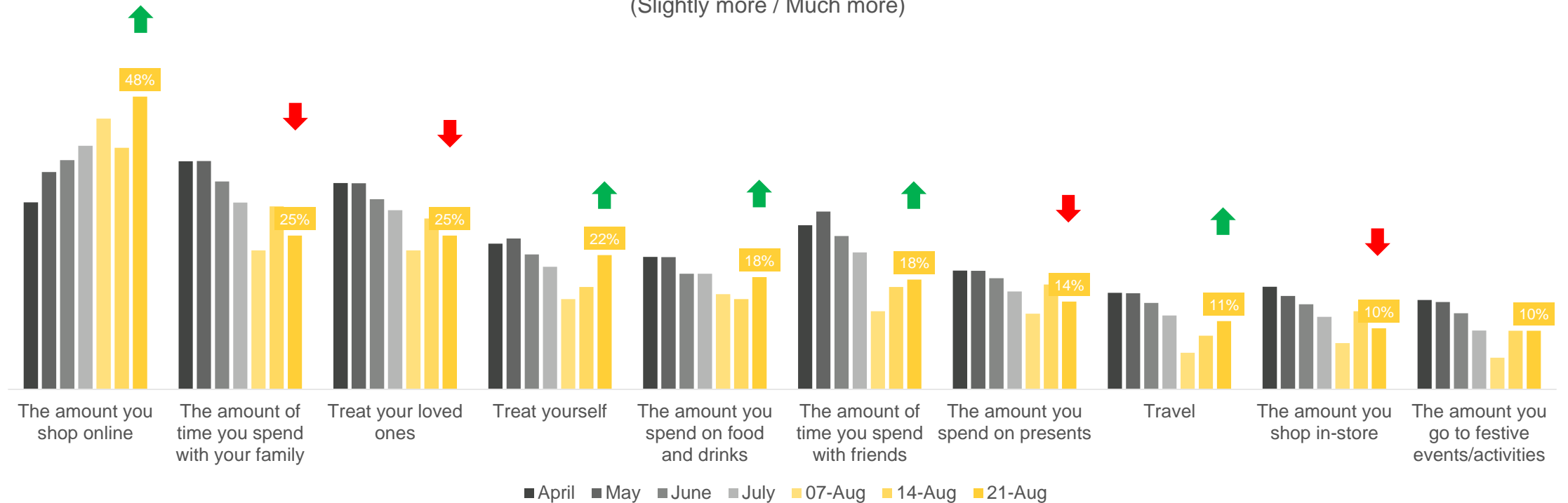
48% of people intend to shop online more at Christmas this year than in 2019 (up 8ppts this week)

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 declined this week, after a brief uplift last week, with decreases 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)

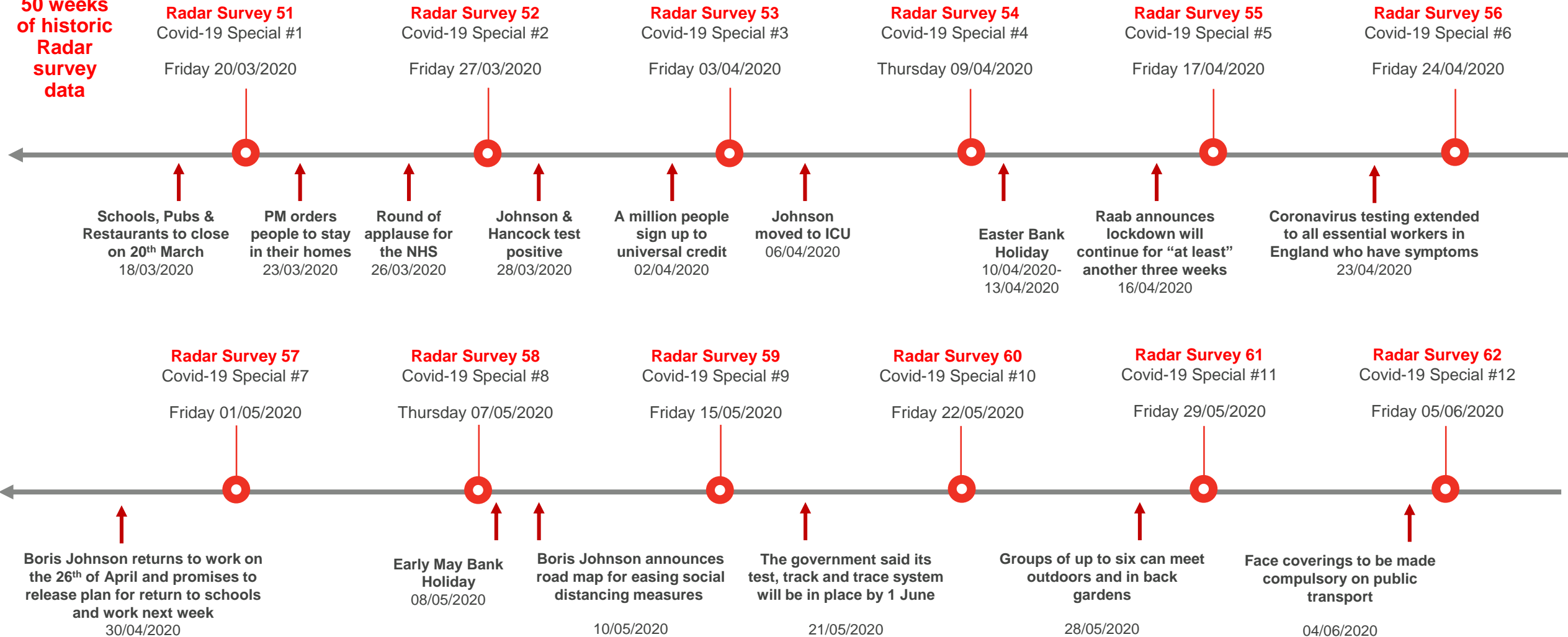


Appendix



Survey Timeline

50 weeks
of historic
Radar
survey
data





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

