

COVID-19 Consumer Impact Report
w/c 08.09.20

OWNED



RADAR



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

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 75 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 4th September to Sunday 6th September 2020.

Summary: Though the nation's mood has lifted following a shorter working week for many, consumer confidence has taken a notable dip

- 01** After a shorter week following the Bank Holiday weekend, **the mood of the nation has picked up this week**, with fewer feeling anxious and **happiness back to 37%** after a slump last week.
 - 02** **Consumer confidence has plummeted to its lowest point (-6.9) since July**, as fewer people are confident in business conditions in the UK
 - 03** In the week that children go back to schools, **concerns over Childcare see a decline**, now at its second lowest point since tracking
 - 04** As the Eat Out Help Out scheme concluded for most restaurants, **we saw a drop in the number of people eating out at restaurants or buying fast food**
 - 05** **Comfort with travel, both in the UK and abroad, has decreased** in the wake of continued local lockdowns and new countries added to the quarantine list leading to a **7ppt drop in thinking about or researching flights** and a **5ppt drop in the number of people intending to travel more in the next 12 months**
 - 06** **The UK are less comfortable returning to out of home activities before a vaccine is available** compared to the previous 7 days; this is most pronounced for holidays and large-scale events
-



**Life satisfaction,
optimism & consumer
confidence**



The mood of the nation has improved this week, with happiness, optimism and life satisfaction seeing increases, and anxiety dropping slightly

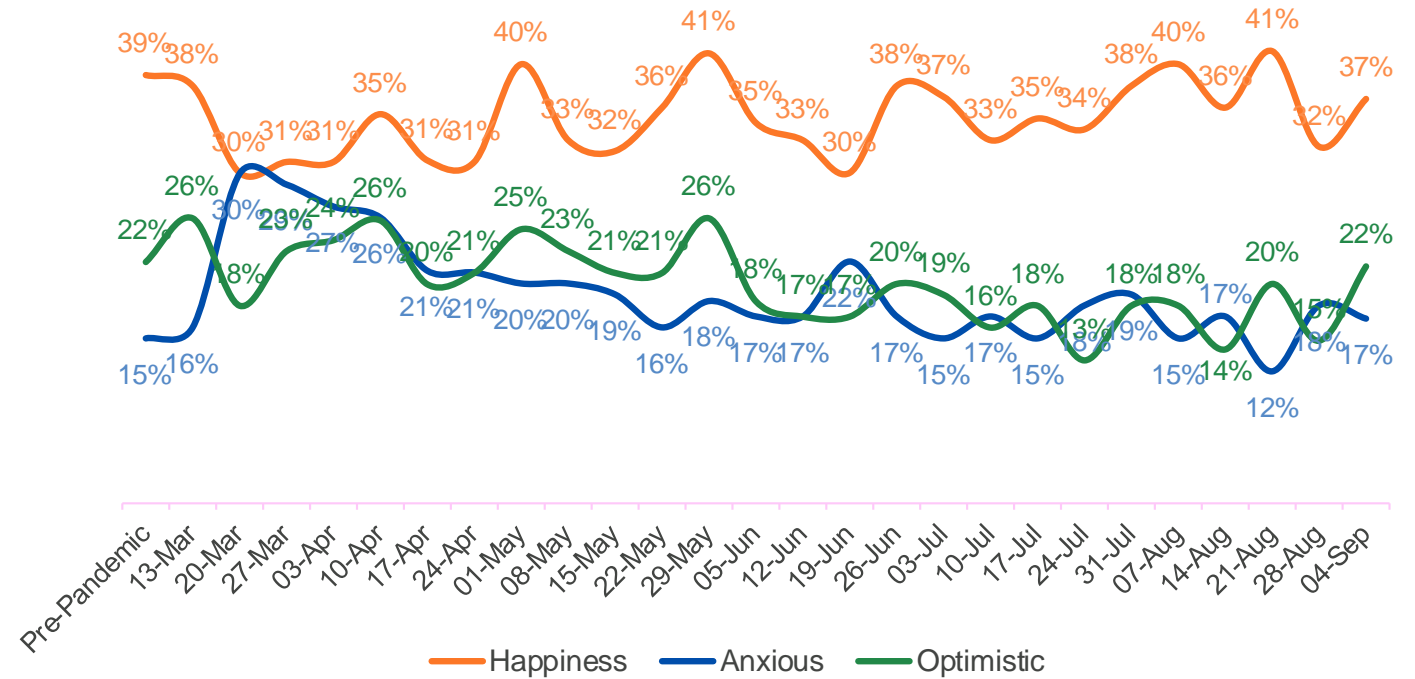
↑ Happiness has bumped back up to 37% this week, after a big drop last week.

↑ Optimism has also seen a significant 7ppt increase up to 22%, the highest since May.

↑ Life satisfaction has increased by 2ppts from 32% to 34%

↓ Anxiety levels have dropped slightly, now at 17%

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, 07/08: 250, 14/08: 250, 21/08: 250, 28/08: 250, 04/09: 250.



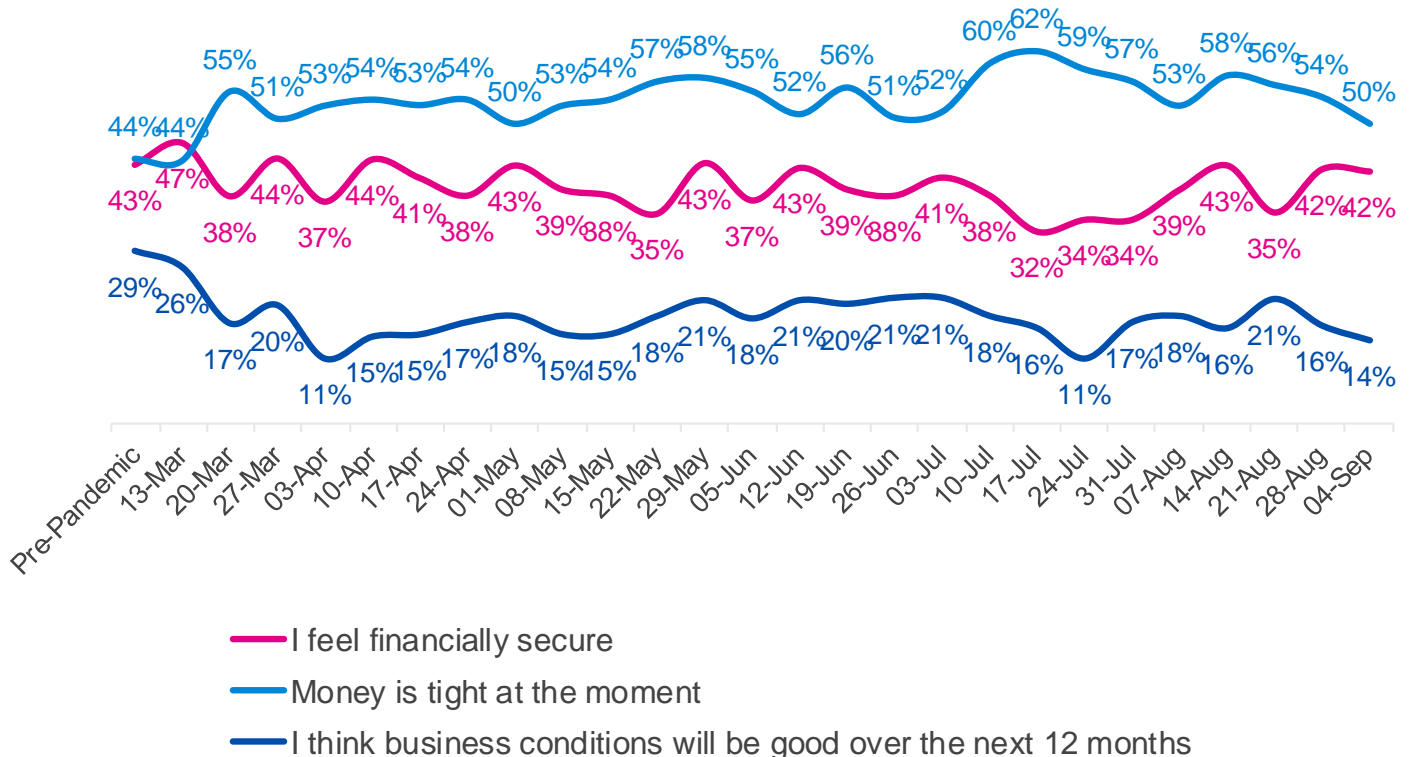
The nation is split fairly evenly between those who feel financially secure, and those who feel money is tight at the moment

■ **Feeling financially secure** has remained at 42% this week

↓ The number of people reporting that **money is tight** continues to decline, this week by 4ppts from 54% to 50%.

↓ **Confidence in future business conditions** has also decreased this week from 16% to 14%

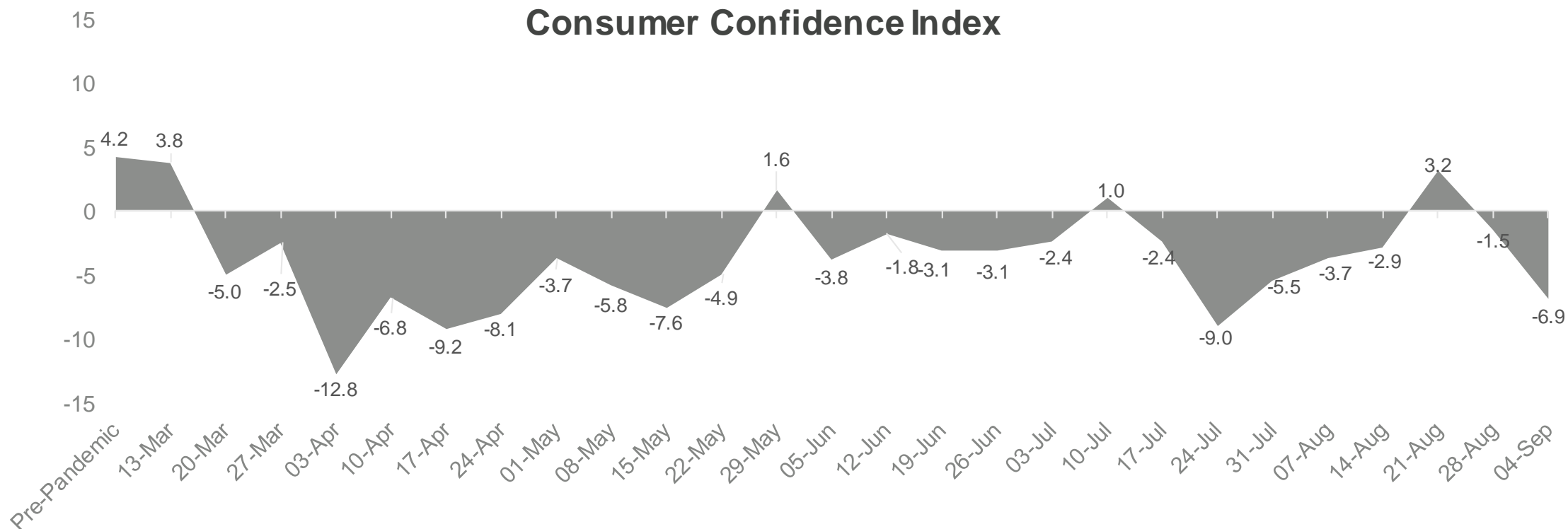
To what extent do you agree with the following statements?
(0=Not at all, 10=Completely)
% selecting top 3 (8-10)



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, 28/08: 250, 04/09: 250.



Consumer confidence has declined significantly this week, down to -1.5



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.



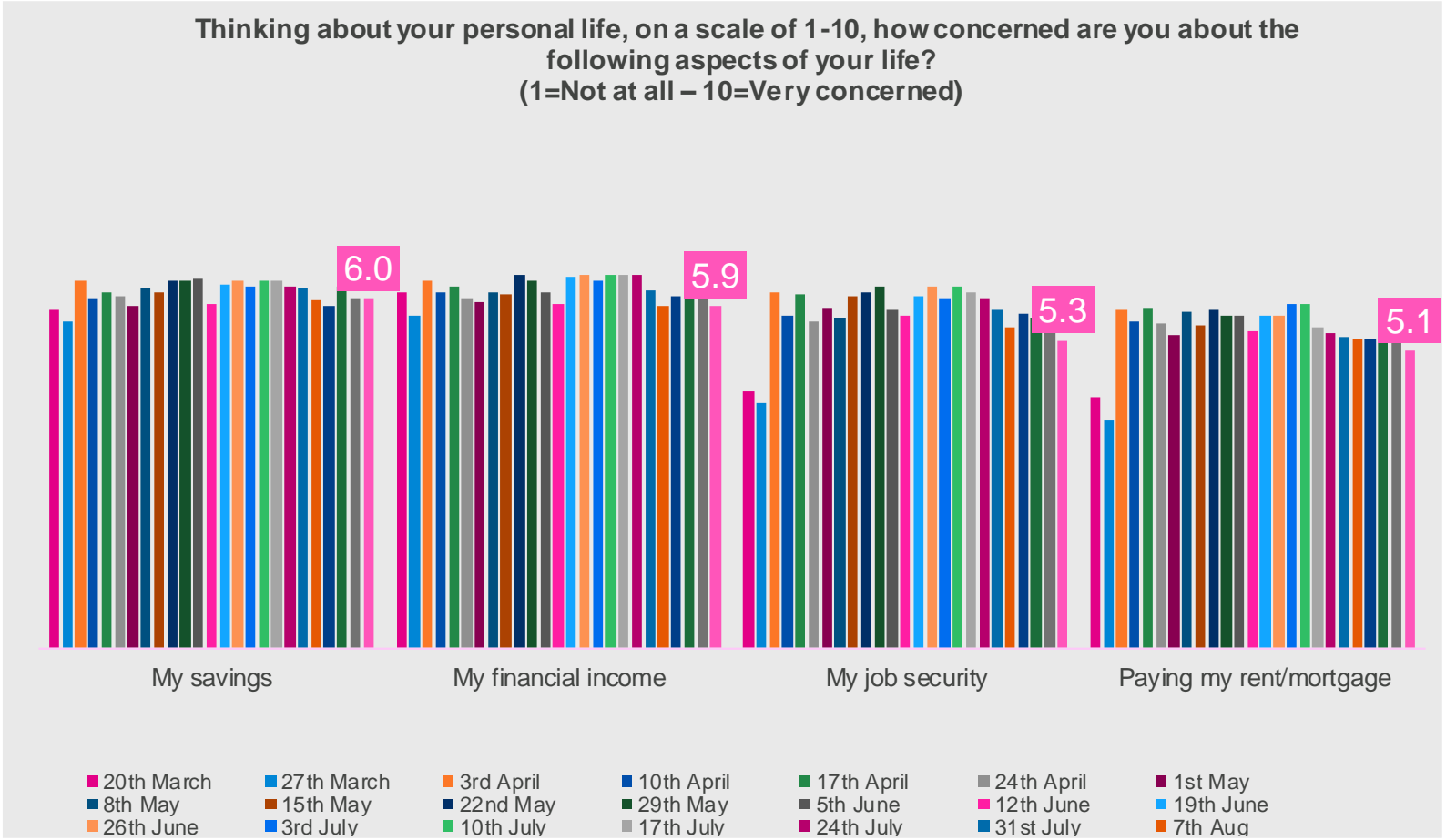
We have seen slight drops in financial related concerns this week, with personal savings being the top concern

14% of households have someone that has been **furloughed**

4% 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



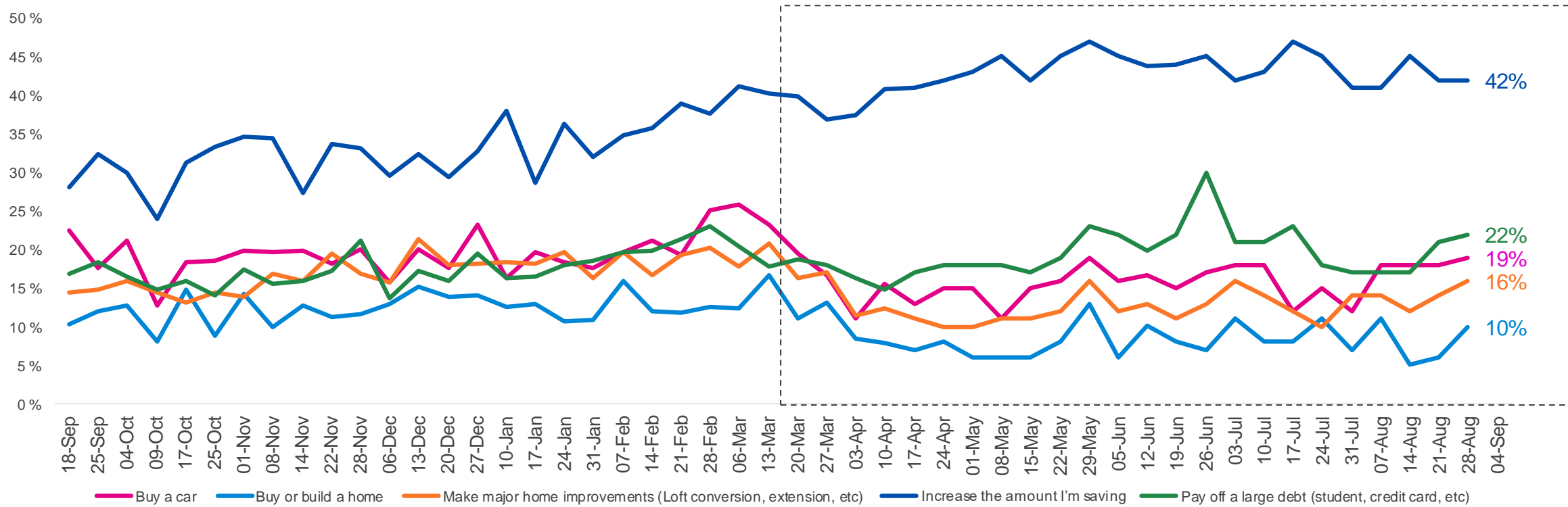
Source: OMD Radar Survey. Pre-Pandemic: 12,076, 13/03: 246, 20/03: 488, 27/03: 480, 03/04: 503, 10/04: 501, 17/04: 501, 24/04: 500, 01/05: 500, 08/05: 500, 15/05: 500, 22/05: 500, 29/05: 500, 05/06: 500, 12/06: 500, 19/06: 500, 26/06: 500, 03/07: 500, 10/07: 500, 17/07: 250, 24/07: 250, 31/07: 250, 07/08: 250, 14/08: 250, 21/08: 250, 28/08: 250, 04/09: 250.



Plans to make home improvements and pay off debts continues to increase, with plans to increase savings unchanged

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. 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.

Confidence in Government & Broad Concerns



Confidence in the government's response has increased slightly this week at 35%

Many feel that the timings of the lockdown measures have been poor, not having started early enough, and easing too early.

“Because the government shut down schools when there were 700 daily cases but are opening them back up when there are 1000 daily cases”

“They’ve made mistakes that have been costly and have affected a lot of people. For example we were put into lockdown too late as evidenced by scientists and medical workers.”

““Decisions have been made at the wrong time. All governments should have stood as one. That way everybody was singing of the same song sheet. The public would have a better idea what to do and not to do. This chopping and changing is not helping people's mental health”

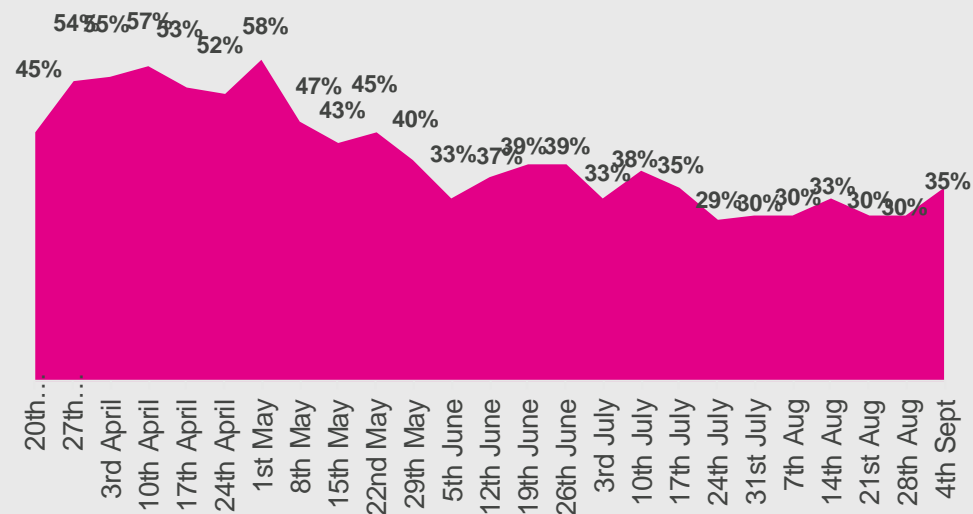
Frequent changes in rules and lockdown measures is impacting on confidence in the Government

“They keep changing their minds. They never seem to tell the truth and they break the rules”

“That change the advice too often and were slow to do a thing about the outbreak until very late”

“They keep changing plans and don’t reveal the actual numbers. They still don’t test at airports”

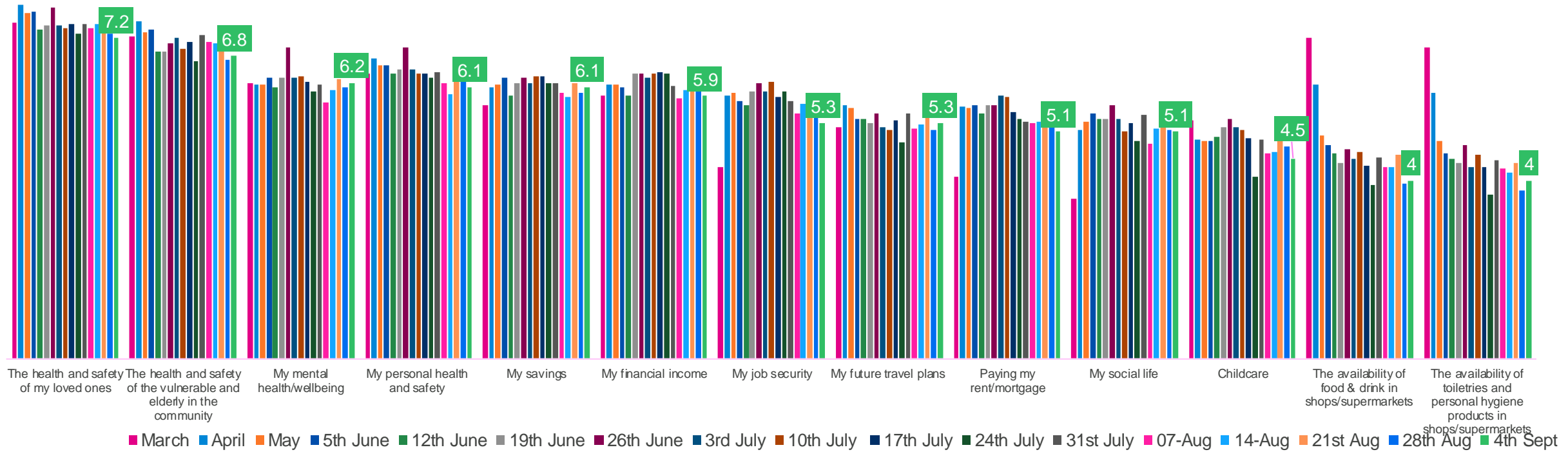
How confident are you in the government's response to the COVID-19 outbreak? (% Confident)





In the week that children go back to schools, concerns over Childcare see a decline

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)

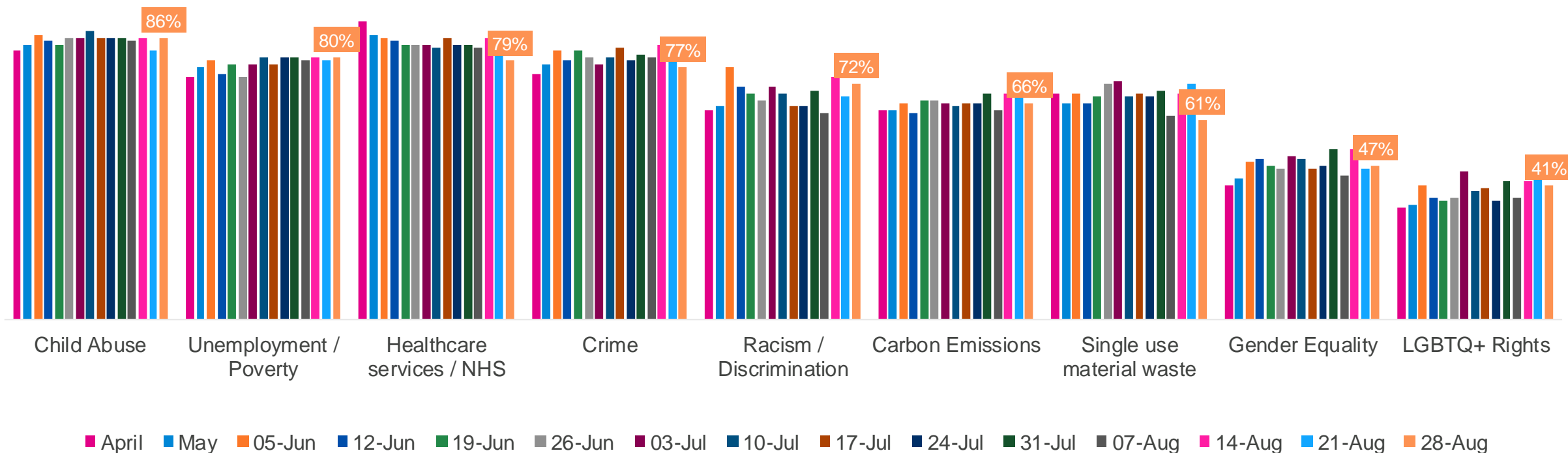


Source: OMD Radar Survey. Pre-Pandemic: 12,076, 13/03: 246, 20/03: 488, 27/03: 480, 03/04: 503, 10/04: 501, 17/04: 501, 24/04: 500, 01/05: 500, 08/05: 500, 15/05: 500, 22/05: 500, 29/05: 500, 05/06: 500, 12/06: 500, 19/06: 500, 26/06: 500, 03/07: 500, 10/07: 500, 17/07: 250, 24/07: 250, 31/07: 250, 07/08: 250, 14/08: 250, 21/08: 250, 28/08: 250, 04/09: 250.



Child abuse continues to be the top concern of the country, with almost 9 in 10 Brits listing this as a concern

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.



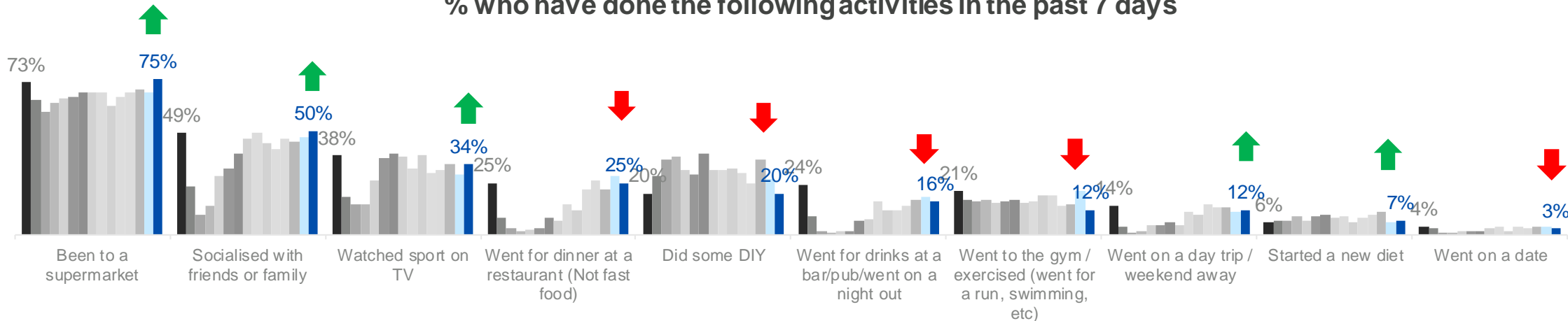
Changes in Behaviour



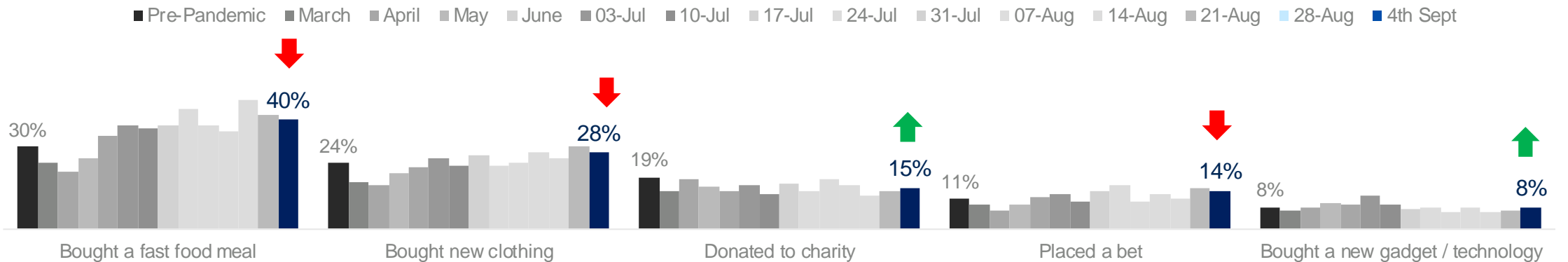
With the 'Eat Out to Help Out' scheme coming to an end, the volume of people buying fast food or going out for dinner at a restaurant declined in the last 7 days

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

What they're doing



What they're buying

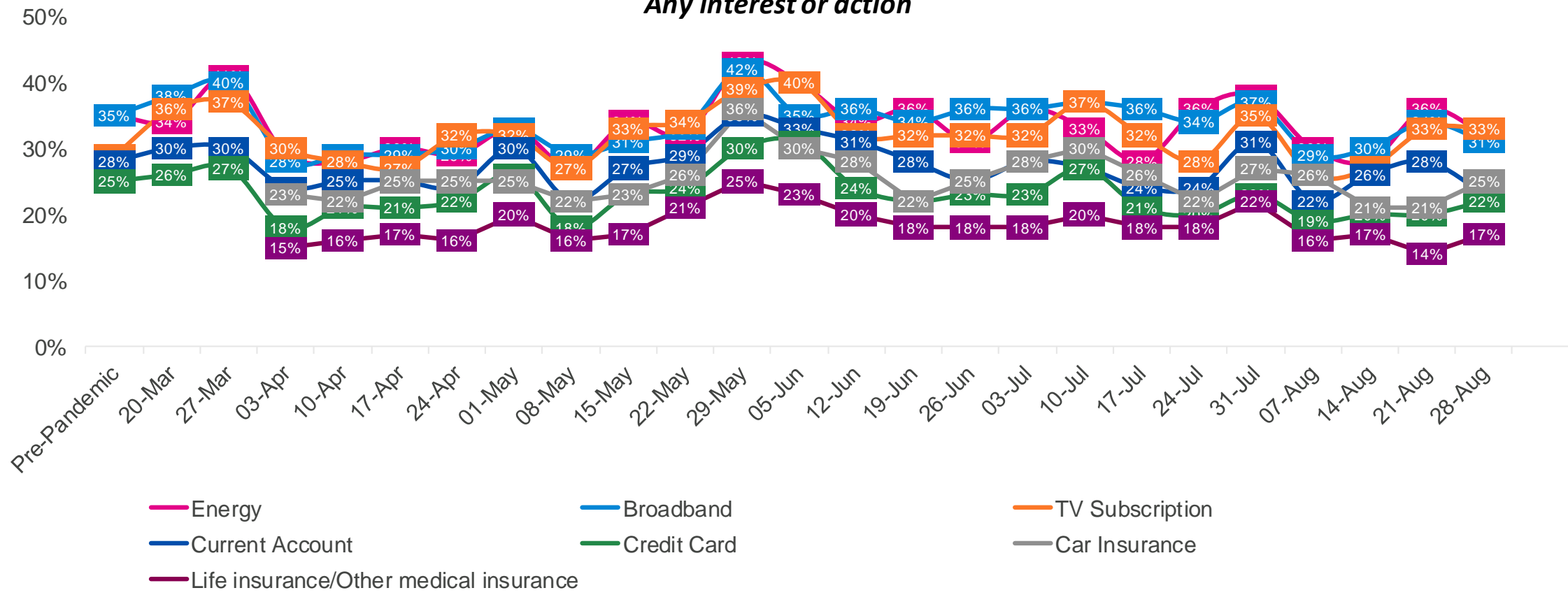


Source: OMD Radar Survey. Pre-Pandemic: 12,076, 13/03: 246, 20/03: 488, 27/03: 480, 03/04: 503, 10/04: 501, 17/04: 501, 24/04: 500, 01/05: 500, 08/05: 500, 15/05: 500, 22/05: 500, 29/05: 500, 05/06: 500, 12/06: 500, 19/06: 500, 26/06: 500, 03/07: 500, 10/07: 500, 17/07: 250, 24/07: 250, 31/07: 250, 07/08: 250, 14/08: 250, 21/08: 250, 28/08: 250, 04/09: 250.



There have been decreases in people taking an interest in or action in their home services suppliers and financial products

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

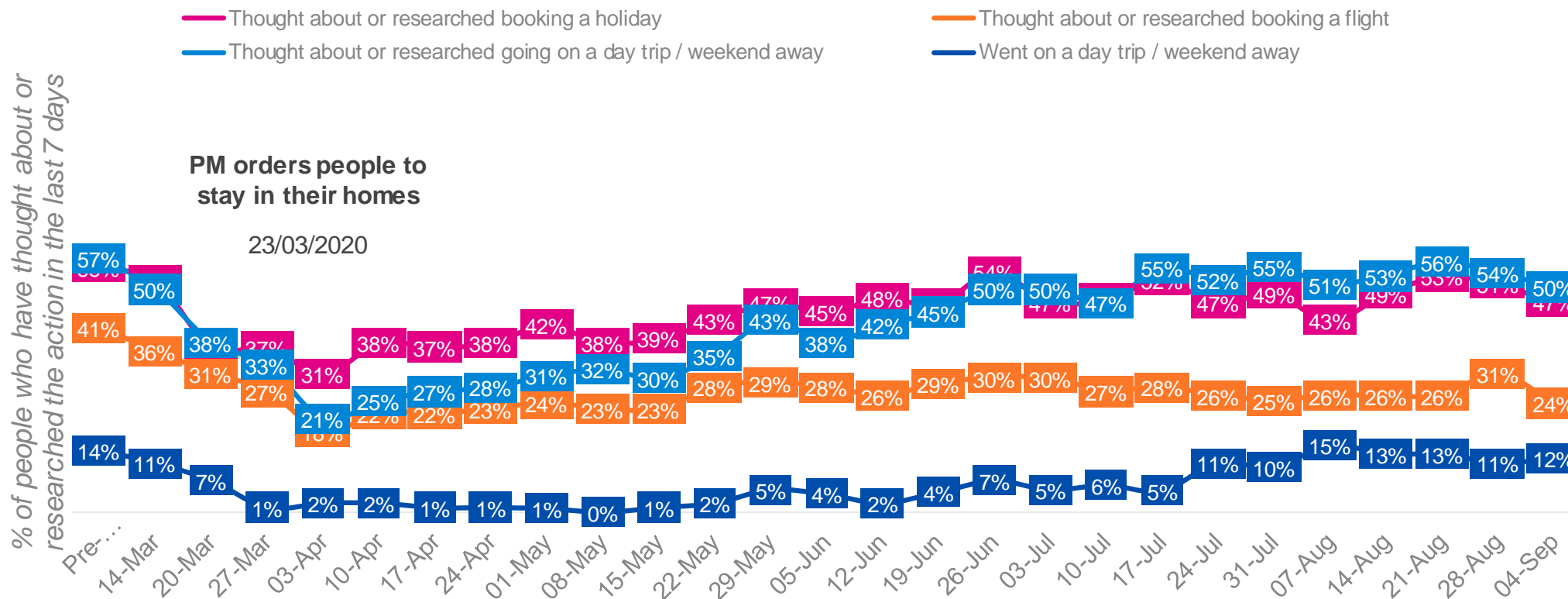


Source: OMD Radar Survey. Pre-Pandemic: 12,076, 13/03: 246, 20/03: 488, 27/03: 480, 03/04: 503, 10/04: 501, 17/04: 501, 24/04: 500, 01/05: 500, 08/05: 500, 15/05: 500, 22/05: 500, 29/05: 500, 05/06: 500, 12/06: 500, 19/06: 500, 26/06: 500, 03/07: 500, 10/07: 250, 17/07: 250, 24/07: 250, 31/07: 250, 07/08: 250, 14/08: 250, 21/08: 250, 28/08: 250, 04/09: 250.



Researching and booking short breaks and holidays away has declined this week, with fewer people planning trips

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

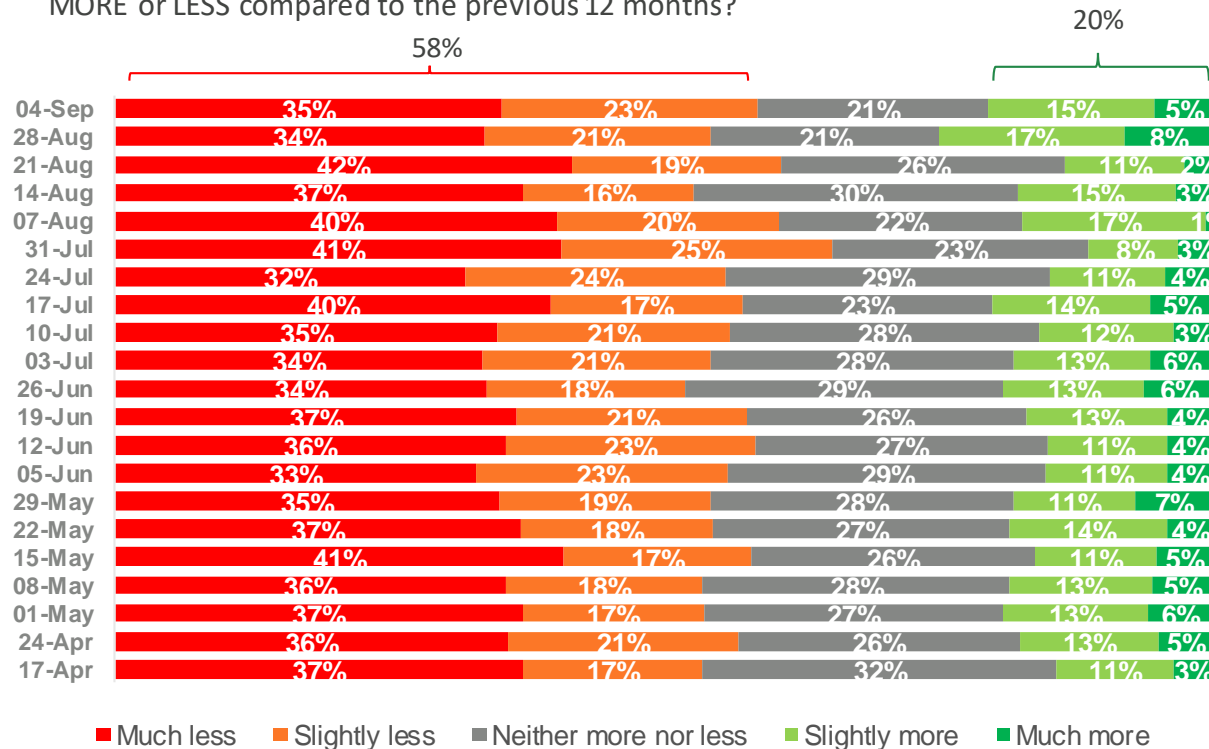




Those predicting to go on more holidays in the next 12 months has seen a drop this week to a fifth of the UK, with over half expecting fewer holidays

With quarantine rules coming into play, many are considering looking to places closer to home for holidays 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?



“We had something booked for my birthday in November which is likely to change, it might be changed to a trip in the UK though rather than being cancelled altogether”

“My boyfriends new job means he is unable to quarantine so we would not go abroad. However, this might push us to do more UK holidays”

“Will not be confident about taking any kind of holiday until the situation improves and life has returned to something approaching normal”

“I’m going to be cautious & careful with my money specially to do with holidays”

“I cancelled my holiday plans this year and I’m undecided about next year it will all depend on COVID”

“Need to get out of the country as Coronavirus and Brexit is driving me MAD”

“After being stuck in the house so long i am planning on going away at least once every two months for 4-5 days all next year, have already booked 4 breaks.”



Changes in Media Consumption

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

Visual channels, such TV and Social Media, saw uplifts this week after a dip last week

Consuming more live TV at the time of broadcast has increased by **1ppt** in the last week, with **22%** claiming to be consuming more.

Catch-up or on-demand TV has increased by **2ppts** in the last 7 days – with **39%** claiming to be watching more catch-up TV than before lockdown.

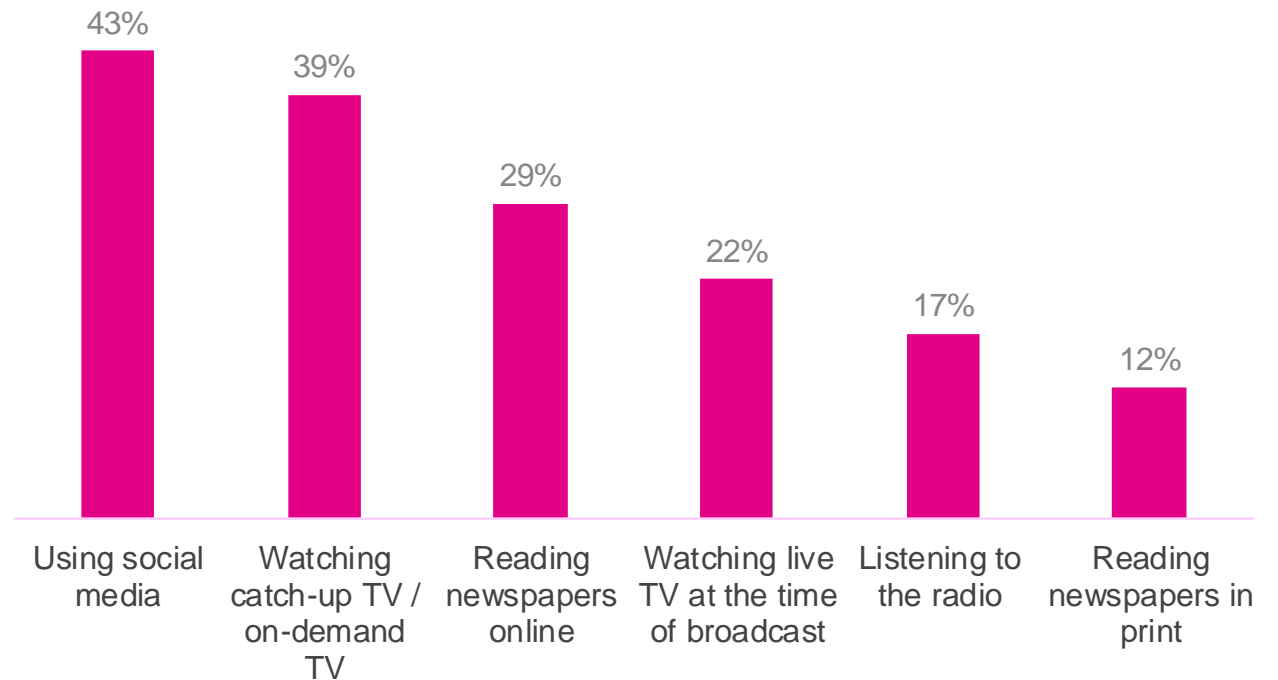
Increased use of social media has increased by **5ppts** with **43%** saying that they are consuming social media more than before the pandemic.

29% say they are consuming more newspaper articles or stories online/on a device, up 3ppts from last week.

Reading newspapers in print declined this week, with **12%** claiming to be reading more than before lockdown, down from **13%** last week.

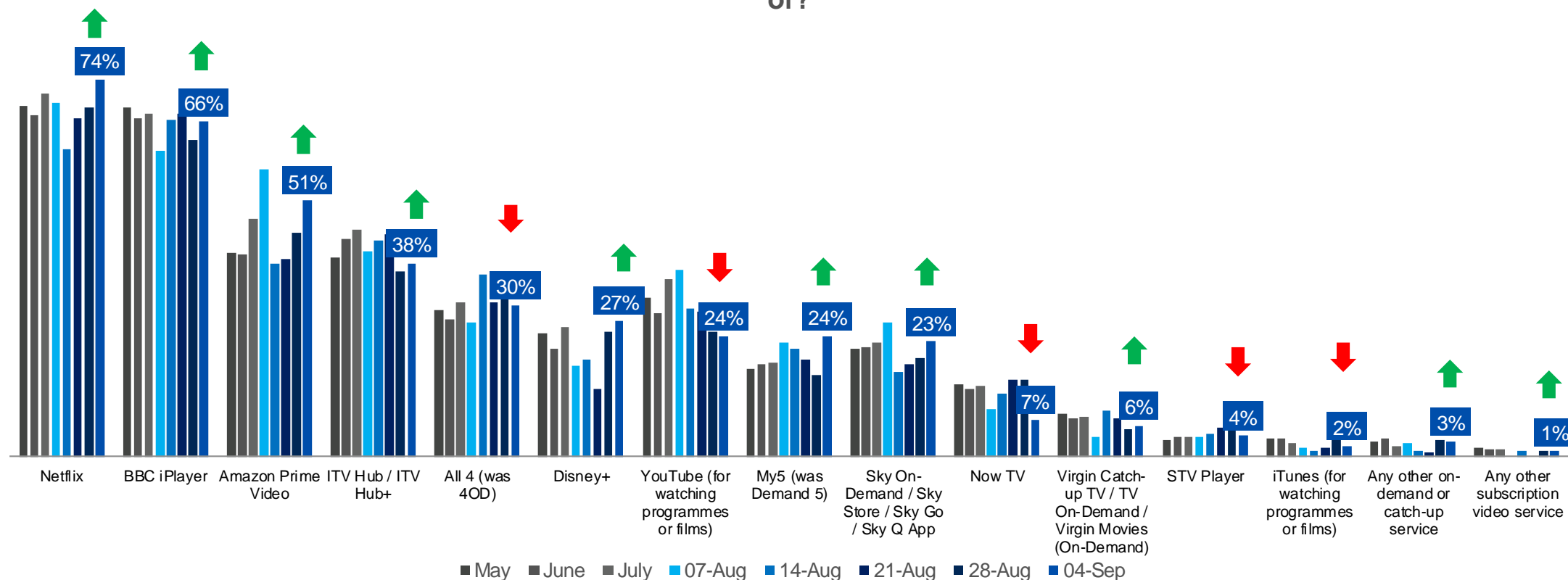
17% say they are consuming more radio than before lockdown began, **4ppts lower** than last week.

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, Netflix continues to be the most popular, with Amazon Prime and Disney+ seeing notable increases this week

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

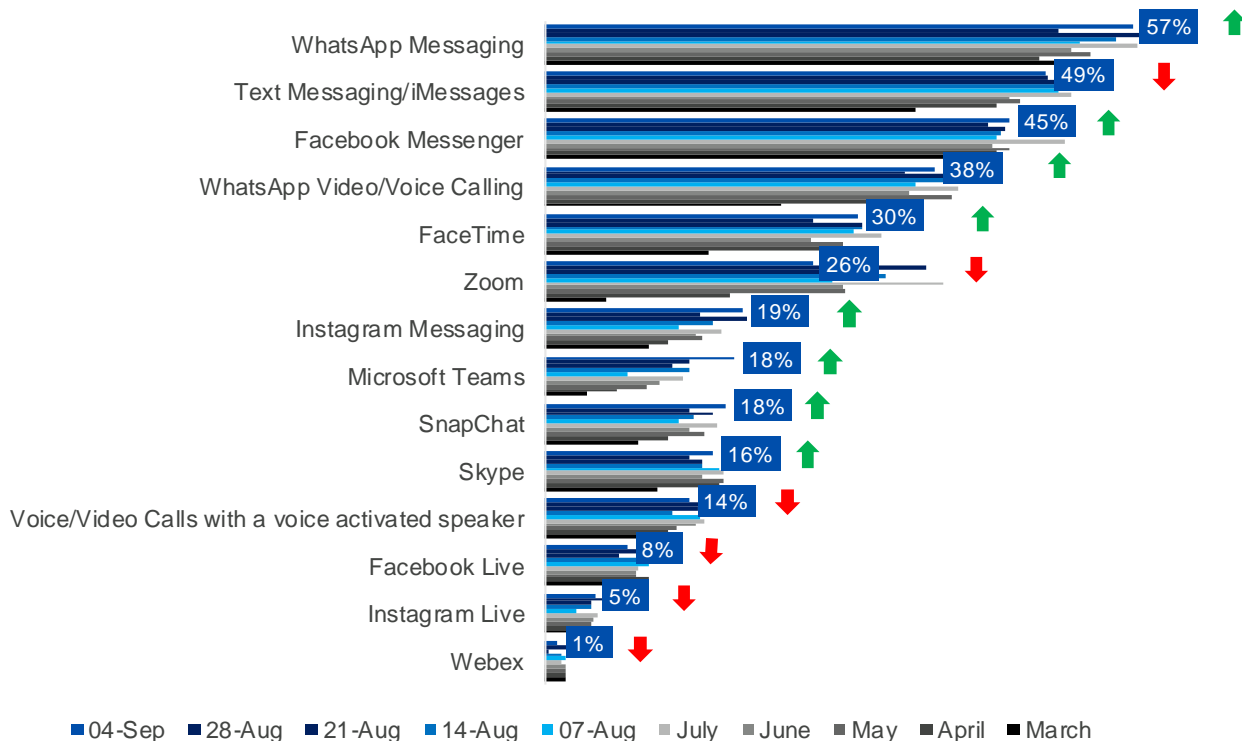




There has been a switch in use of video calling software, with Microsoft Teams experiencing a notable uplift and Zoom a significant decrease

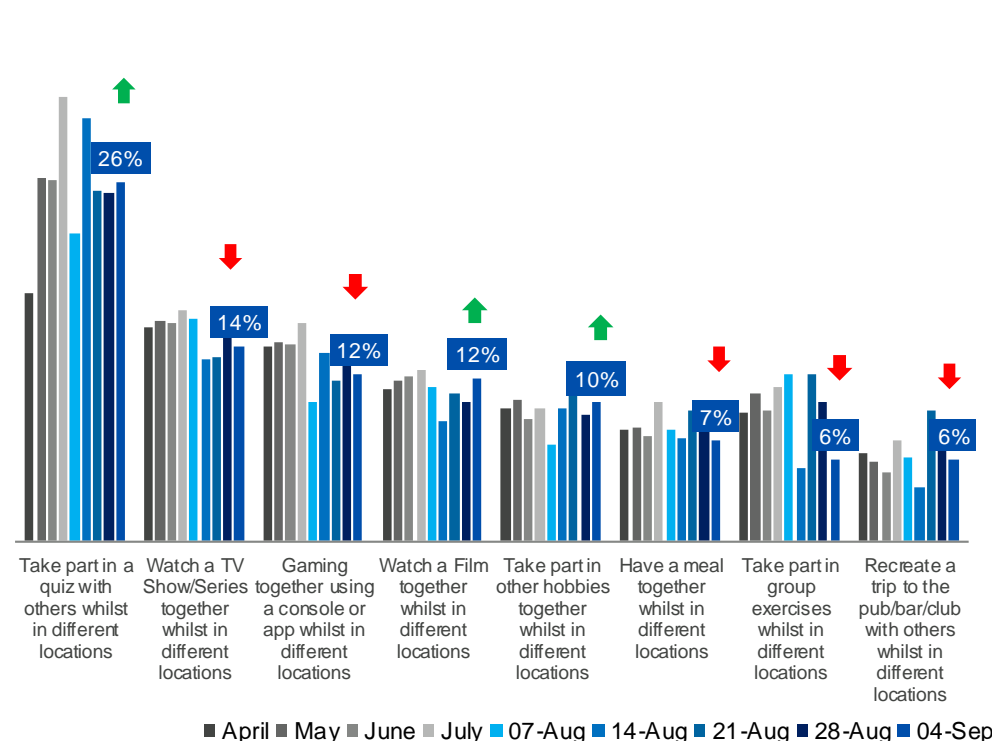
Use of WhatsApp recovered this week but Zoom experienced a significant dip in use

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



Quizzing remains a prominent activity almost 6 months into lockdown

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

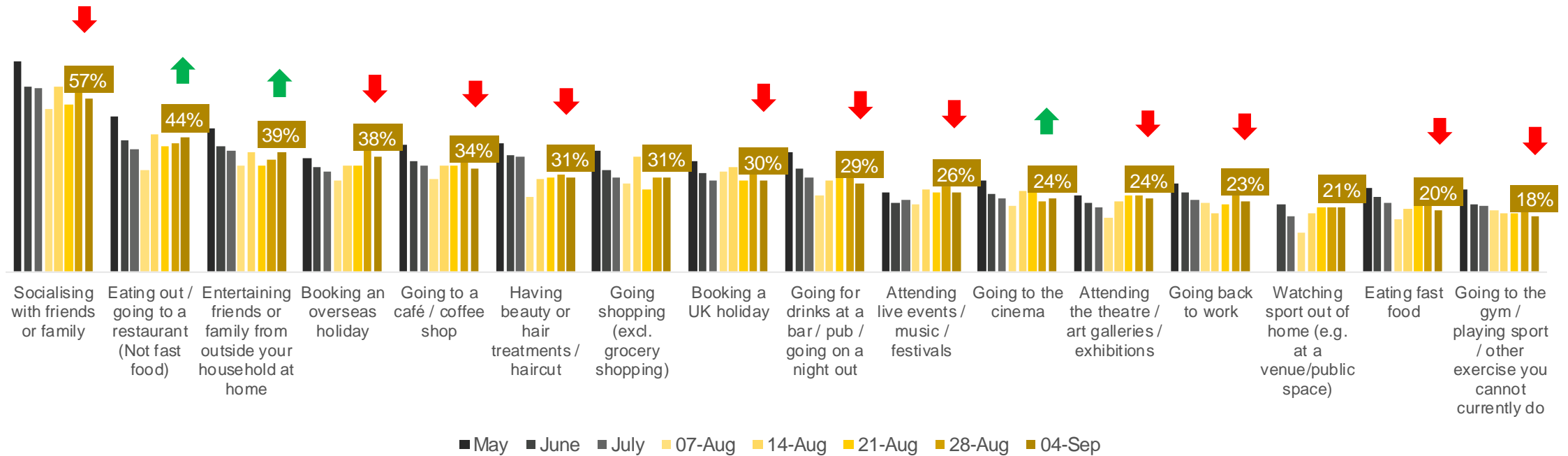




Looking ahead

Anticipation to eat out continued despite the ‘Eat Out to Help Out’ scheme coming to a close, whereas anticipation for many activities has seen a decline

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)



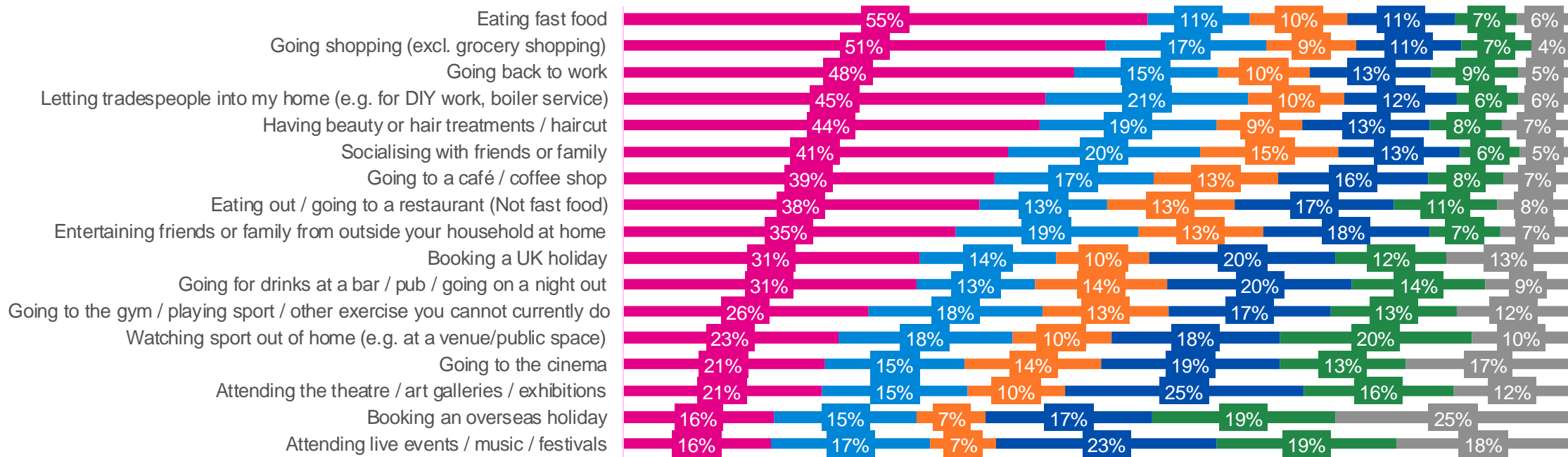


The nation are feeling slightly more comfortable with public events but there has been a decrease in feeling comfortable booking holidays

There has been a 3ppt decrease in feeling comfortable booking an overseas holiday and a 2ppt decrease in feeling comfortable booking a UK holiday. However, there has been a 2ppt increase for attending live events and going to the cinema and a 3ppt increase for attending the theatre/galleries/exhibitions

When would you feel comfortable doing the following again?

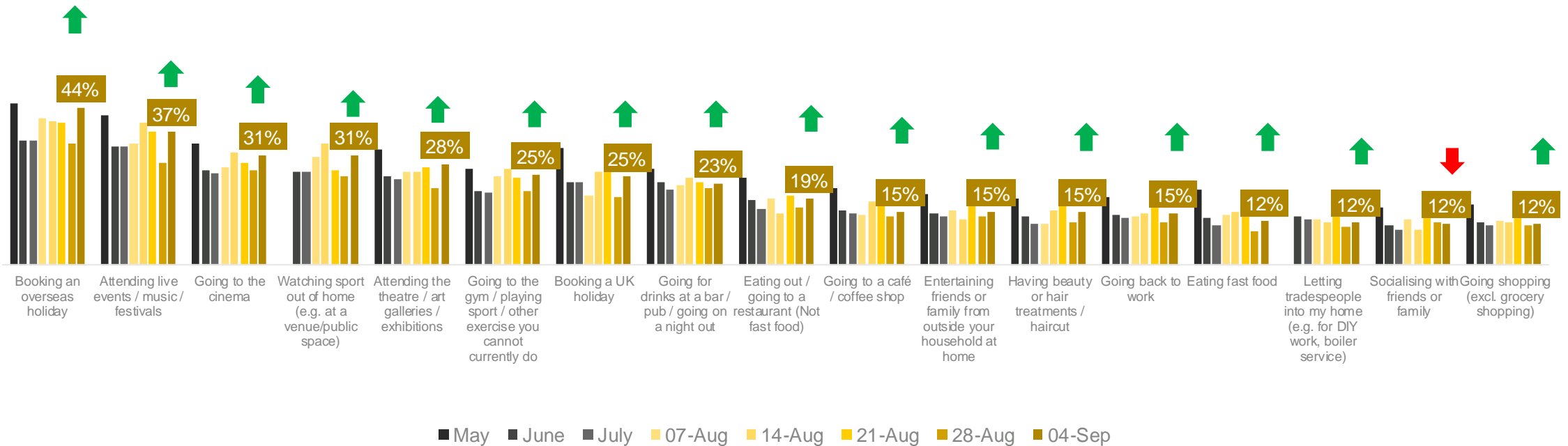
- I feel comfortable doing this now
- As soon as the government social restrictions are lifted
- Not until a few weeks after the restrictions are lifted
- Not until a few months after the restrictions are lifted
- Not until a proportion of the population has been vaccinated
- Not until my family and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



There have been increases in the percentage of people that do not feel comfortable returning to out of home activities before a vaccine is available across a wide range of activities

When would you feel comfortable doing the following again?

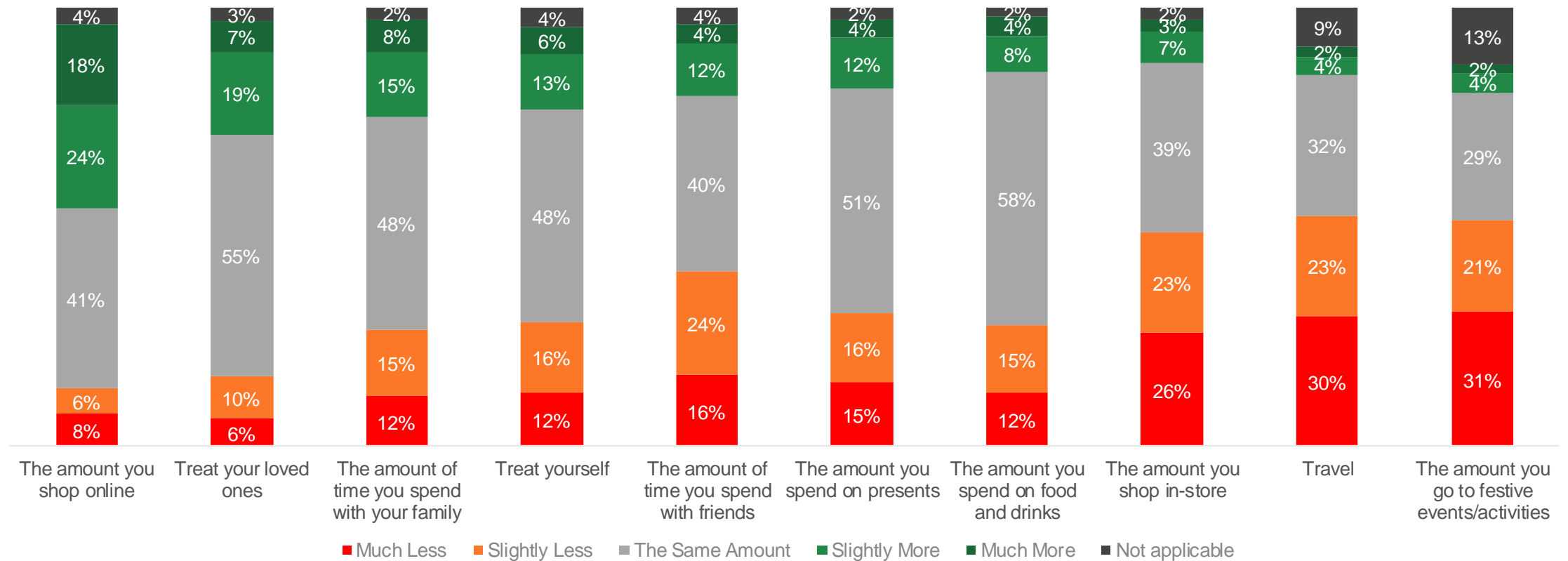
(Not until a significant proportion of the population has been vaccinated / Not until my family and I have been vaccinated)





41% of people intent to shop online more for Christmas shopping vs. 2019, and a quarter predict they'll spend more time with their families

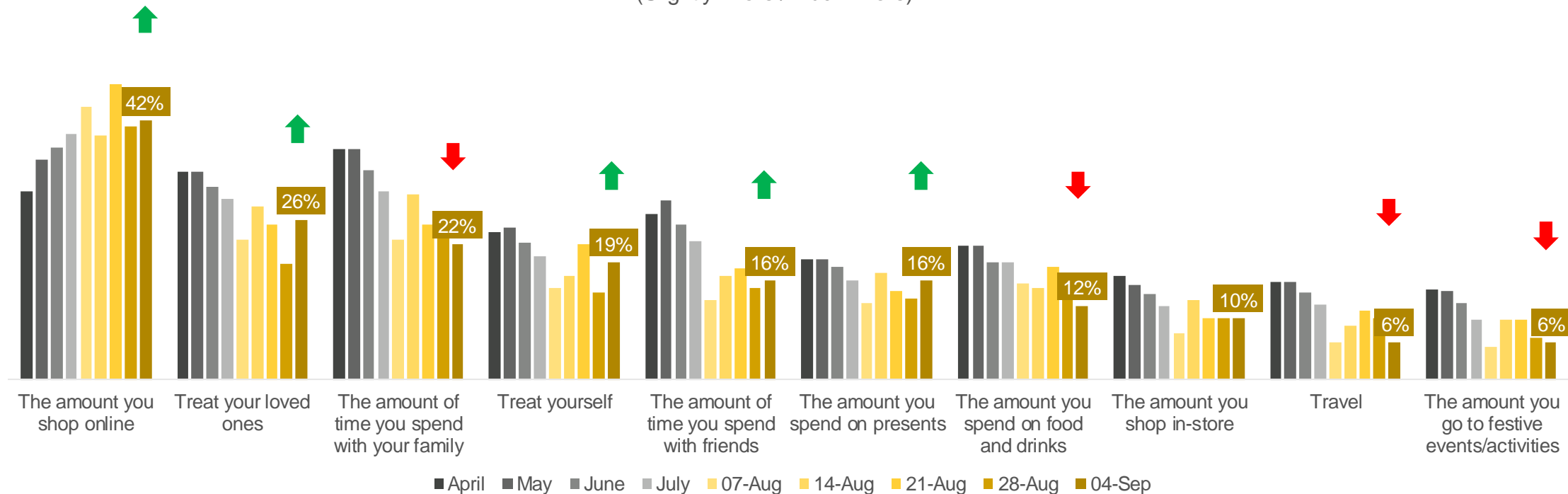
Looking ahead to Christmas 2020, do you think you will do more or less of the following actions compared to Christmas last year?





Intent to treat others and ourselves has increased this week, as well as the amount that people intend to spend 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 20th 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 26th 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



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

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



Bowling alleys, theatres, music
and performance venues and
other culture, sport, leisure and
business sectors reopen
15/08/2020

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



Bank Holiday
31/09/2020

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





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

