

COVID-19 Consumer Impact Report
w/c 02.11.20

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 83 weeks, surveyed over 24,000 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 30th October to Sunday 1st November 2020.

Summary: The nation's mood has slumped this week, particularly felt amongst those living in Tier 3 areas

- 01** With strong rumours circulating around a national lockdown, the nation's outlook has declined: **happiness has plummeted by 8ppts**, and **anxiety is at its highest since April**. Those facing stricter Tier 3 lockdown measures are less likely to report feeling happy, satisfied and optimistic, compared to those in lower tiers.
 - 02** **Personal financial stability has increased this week**, with fewer people reporting that they are feeling the pinch, likely to be driven by pay days often experienced at the end of the month.
 - 03** **Concerns over job security has increased slightly this week**, with 11% of the nation having someone in their household furloughed, and 6% having someone who has been made redundant.
 - 04** **Ordering fast food continues to be at an all-time high this week (43%)**. Meanwhile, we have seen declines in the percentage of people who feel comfortable eating out (-5ppts), going for drinks (-4ppts) or socialising (-3ppts) this week.
 - 05** Intent to indulge this Christmas is low this week, with **fewer people intending to spend more on presents, food and drinks and treating loved ones** compared to last year.
-



**Life satisfaction,
optimism & consumer
confidence**



The nation's happiness has plummeted this week, with anxiety levels the highest we have seen since April



Happiness levels decreased this week dropping 8ppts from 39% from 31%



Optimism has returned back to 20% this week, increasing by 5ppts from 15%

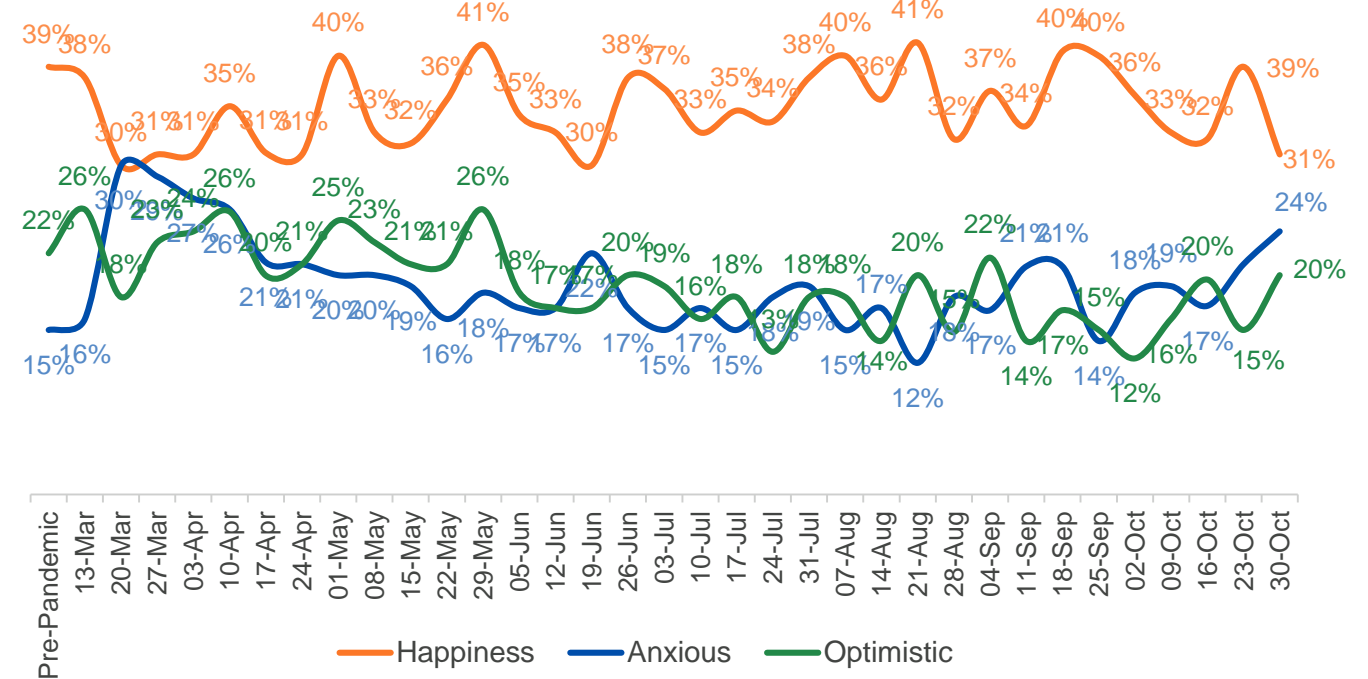


Life satisfaction has declined again this week by 5ppt, now at 25%



Anxiety levels have seen a further 3ppt increase this week, now with 24% of the nation now feeling anxious

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, 11/09:250, 18/09:250, 25/09:250, 02/10:250, 09/10:250, 16/10:250, 23/10: 254, 30/10: 250.



Feelings of financial stability have increased this week, with fewer people feeling the pinch, and more people feeling secure in their finances

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



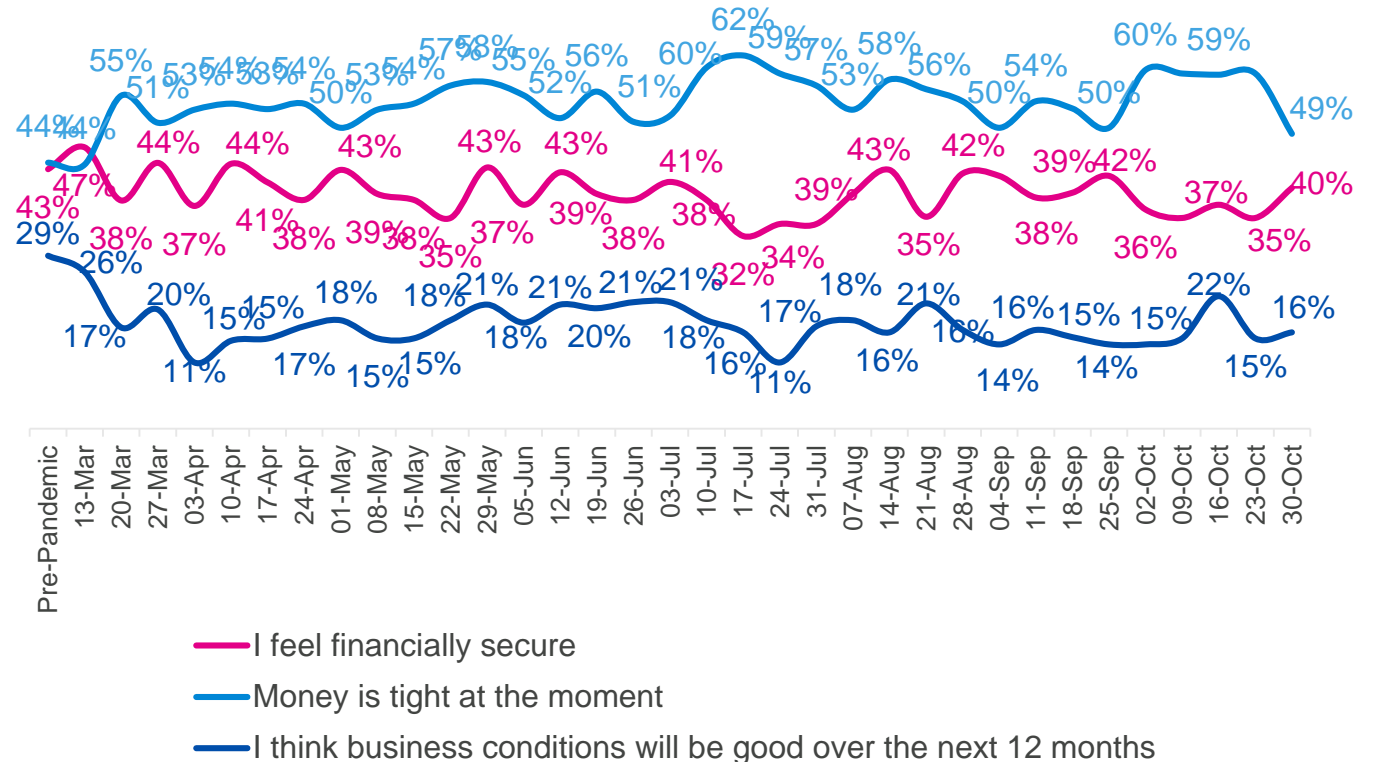
There has been a 5ppt increase in the percentage of people feeling financially secure this week, now at 40%



The percentage of people reporting that money is tight has dropped 10ppts, now at 49%

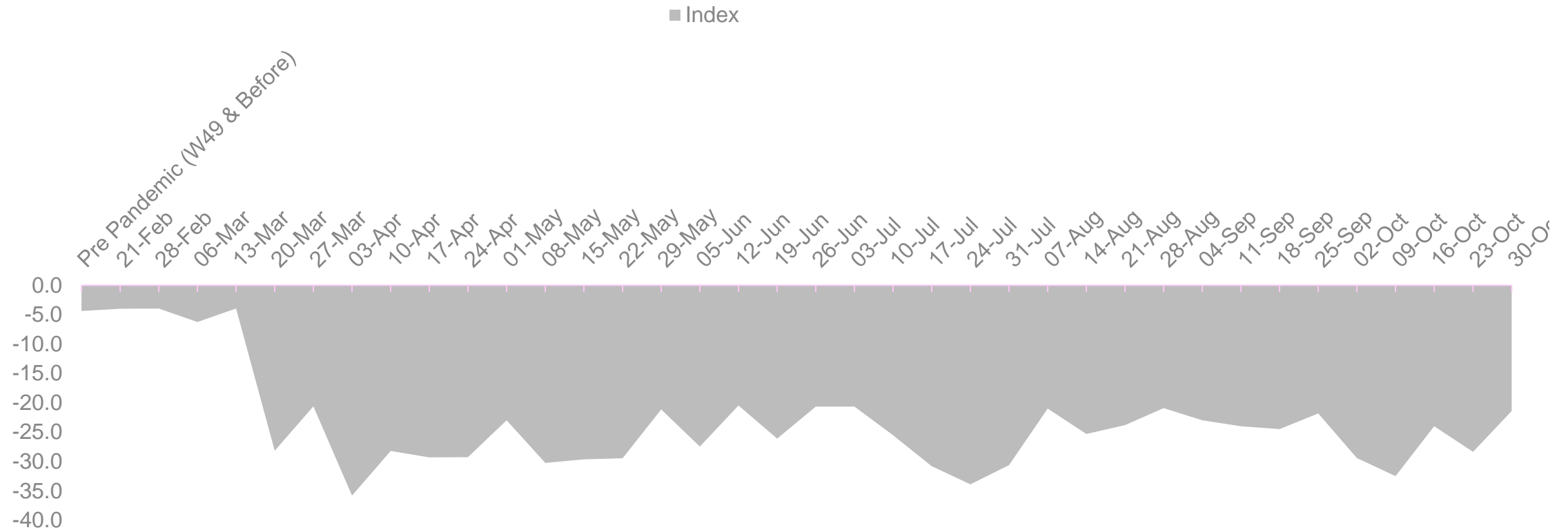


Confidence in future business conditions has increased marginally by 1ppt to 16%





Consumer Confidence has increased slightly this week, but still remains far below pre-pandemic levels



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. *Please note that we have removed two statements that were originally included in Index calculations to get a more nuanced view, and therefore the data now shown in this chart is different to previous weeks.*



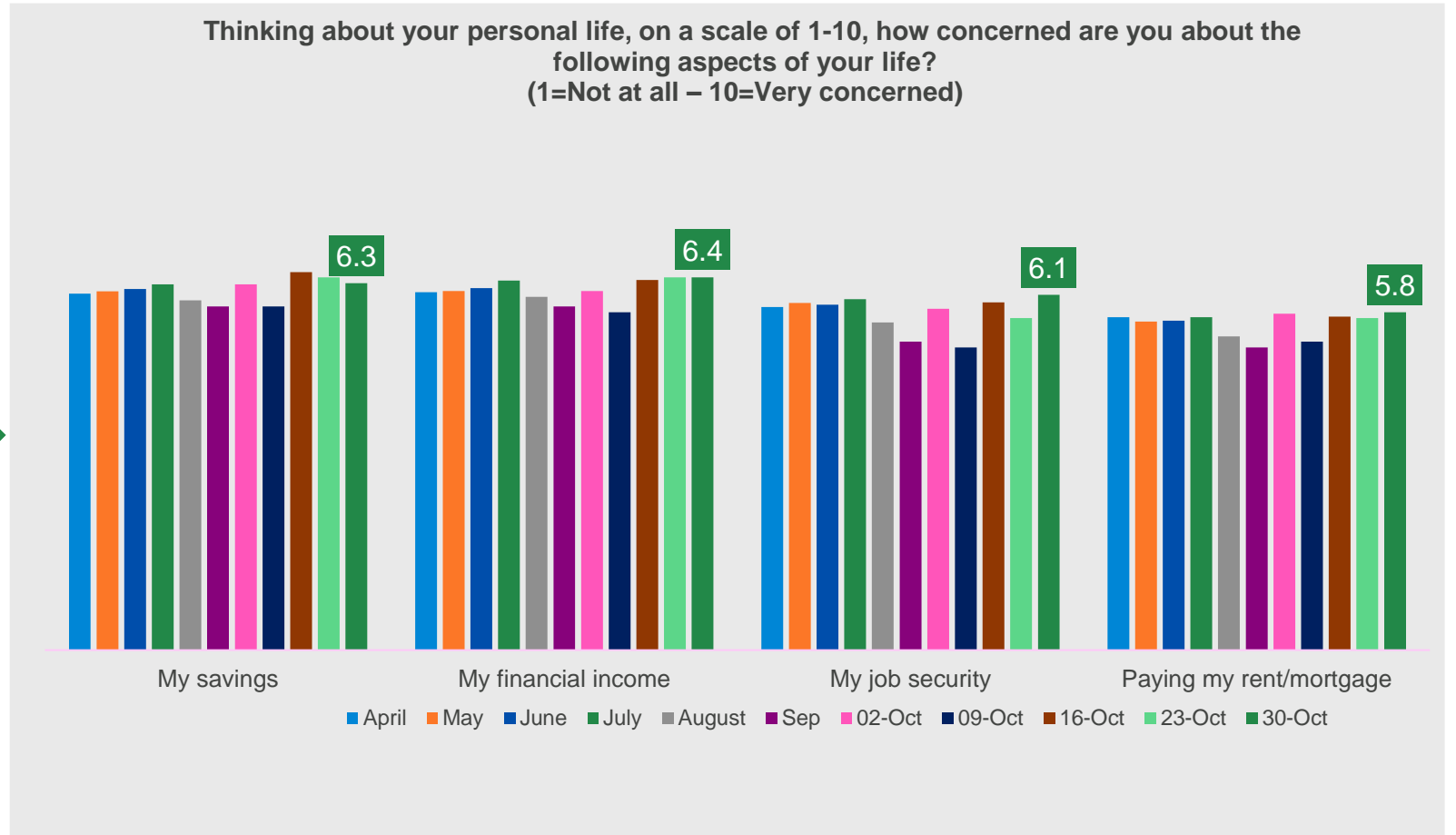
Concerns over job security has increased slightly this week, with 11% of the nation having someone in their household furloughed

11% of households have someone that has been **furloughed**

10% 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

62% say that their employer has been **supportive** during the COVID-19 outbreak

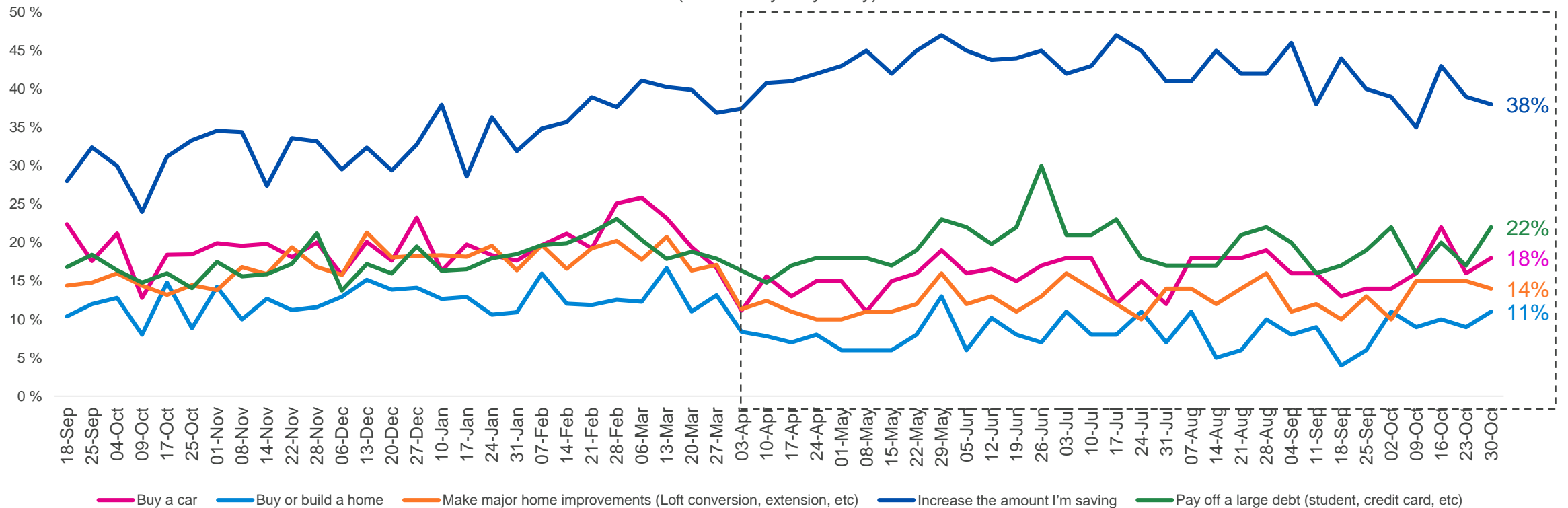




Those intending to buy or build a home has continued to increase, now at 11%

Those intending to increase the amount they are saving in the next 6 months has continues to decline this week, now at 38%

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

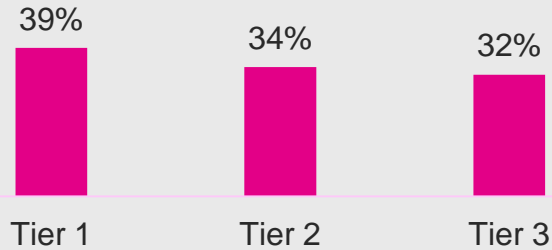


Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 28/08:250, 04/09:250, 11/09:250, 18/09:250, 25/09:250, 02/10:250, 09/10:250, 16/10:250, 23/10: 254, 30/10: 250.

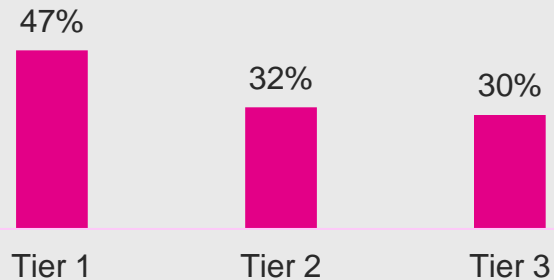


Looking specifically between tiers, there are clear patterns to show restrictions are impacting on optimism and outlook

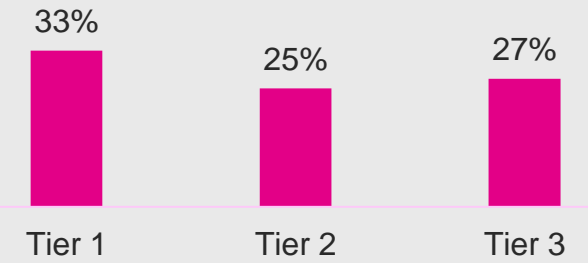
Happy
% agree



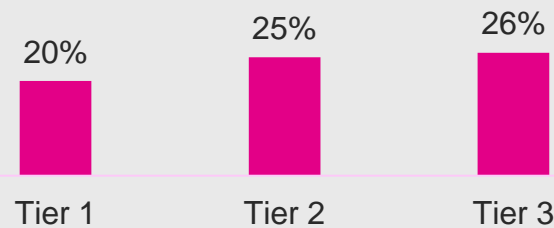
Worthwhile
% agree



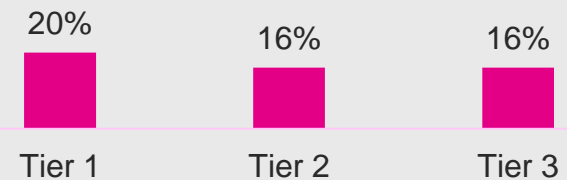
Life Satisfaction
% agree



Anxiety
% agree



Optimism
% agree



Confidence in Government & Broad Concerns



Confidence in the Government's response to Covid-19 has increased marginally this week, but still remains low

Many feel the Government have been deceitful and have unethical intentions, benefitting those in their party over those in need in the UK:

“Because they have ignored scientific advice supposedly to prevent the economy suffering. But I believe it's really to protect large property owning companies in large cities/ hedge funds / Tory donors and this caused some companies in town centres to go back to work too early. I believe this has affected spread rates of the virus”

“It's been dreadful, they're corrupt, uncaring, incompetent, racist and have no empathy for anyone who's struggling”

“This government do not look after the most vulnerable in society and I don't have much confidence that will change any time soon.”

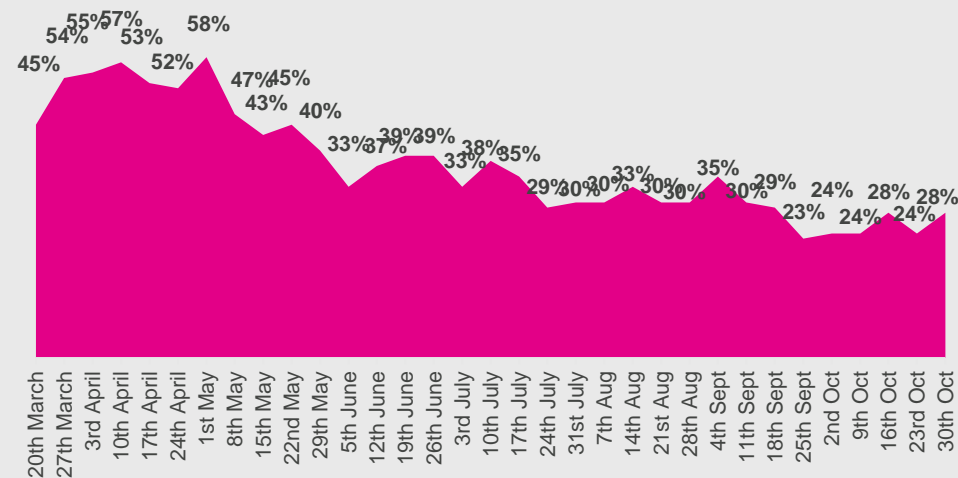
“Our so called government exist on lies and deceit, they have no idea on what to do or say, ignore the sciences, we have a cabinet of no hoper yes men following a moronic and dangerous excuse for a prime minister, who would not know the truth if it bit him, he has his own agenda and will lie and cheat to get it, totally untrustworthy.”

Others believe the Government have been ignoring Scientific advice and therefore putting the nation at higher risk:

“They are moving away from following scientific advice and the current situation is confused and inconsistent. The measures implemented are clearly not working due to the failure of authorities to enforce them.”

“Feel they have taken many u-turns, brushed off scientific advice and caused unnecessary deaths. They have lied throughout and totally ignored their own rules”

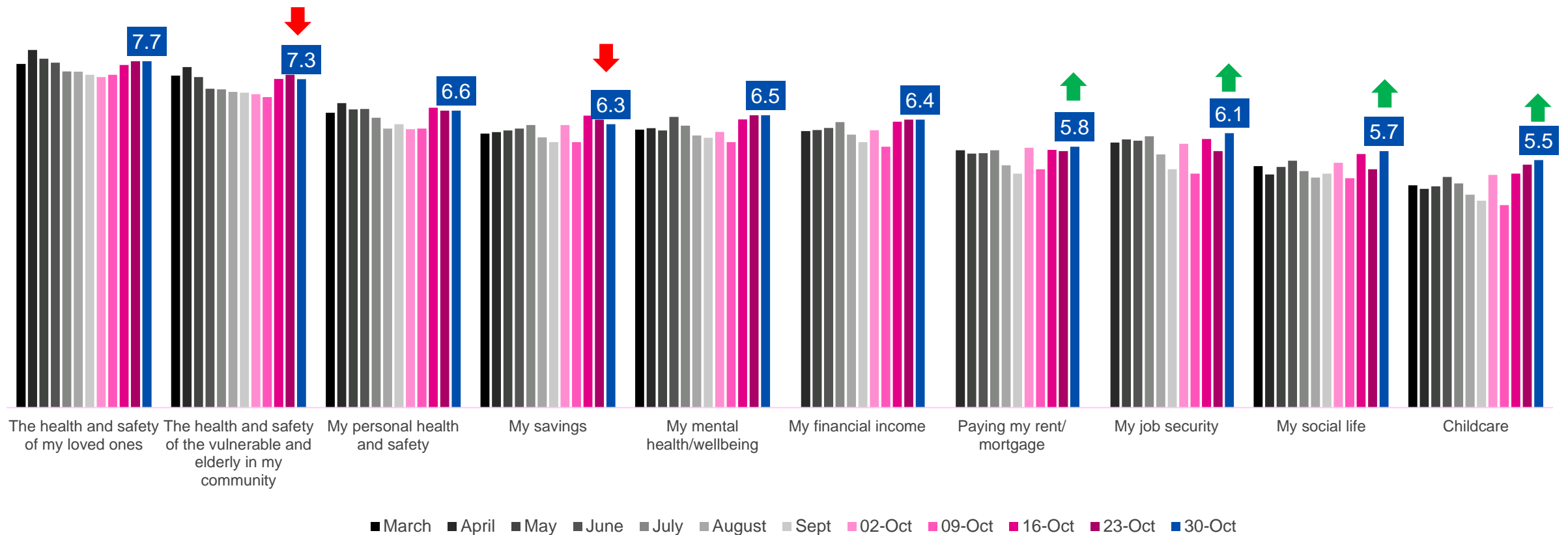
How confident are you in the government's response to the COVID-19 outbreak?
(% Confident)





Concerns over paying rent, job security, social life and childcare have all seen increases 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)

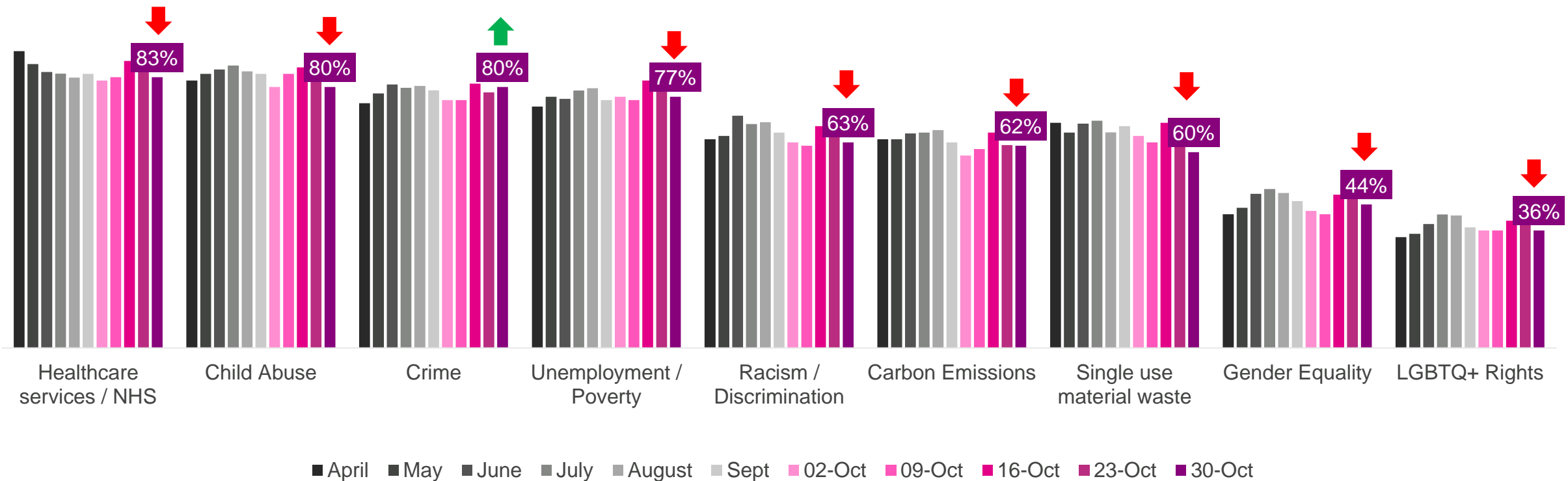


Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 28/08:250, 04/09:250, 11/09:250, 18/09:250, 25/09:250, 02/10:250, 09/10:250, 16/10:250, 23/10: 254, 30/10: 250.



Most societal concerns have reduced this week, with the exception of a marginal increase in concerns over crime rates

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, 11/09:250, 18/09:250, 25/09:250, 02/10:250, 09/10:250, 16/10:250, 23/10: 254, 30/10: 250.

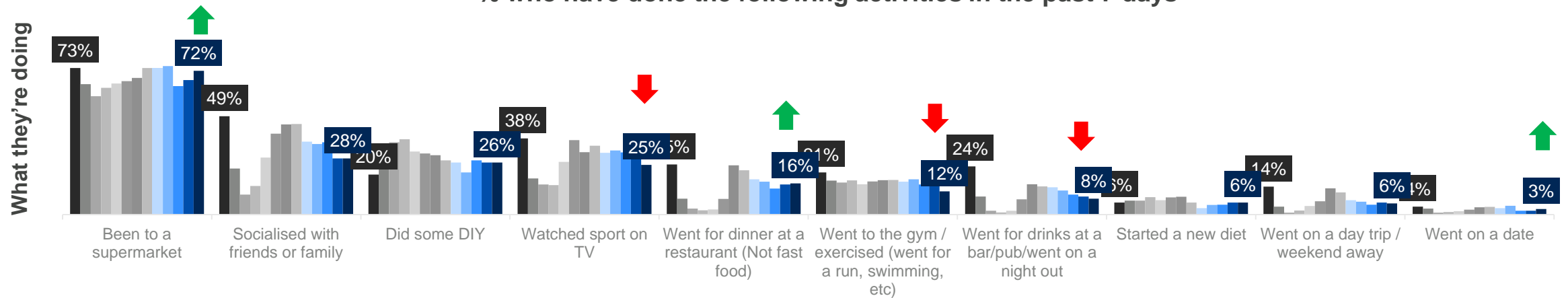


Changes in Behaviour

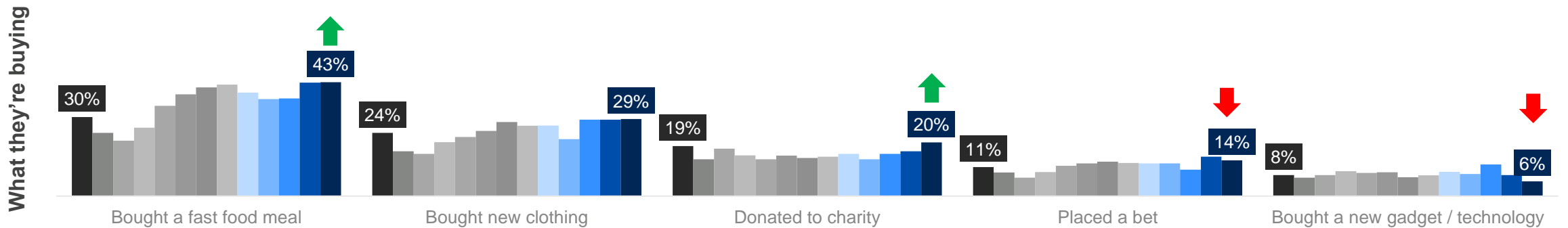


Grocery shopping in-store has increased after a recent dip and people have been more charitable this week, with a 3ppt increase in donating to charity

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



Legend: Pre-Pandemic, March, April, May, June, July, August, September, 02-Oct, 09-Oct, 16-Oct, 23-Oct, 30-Oct



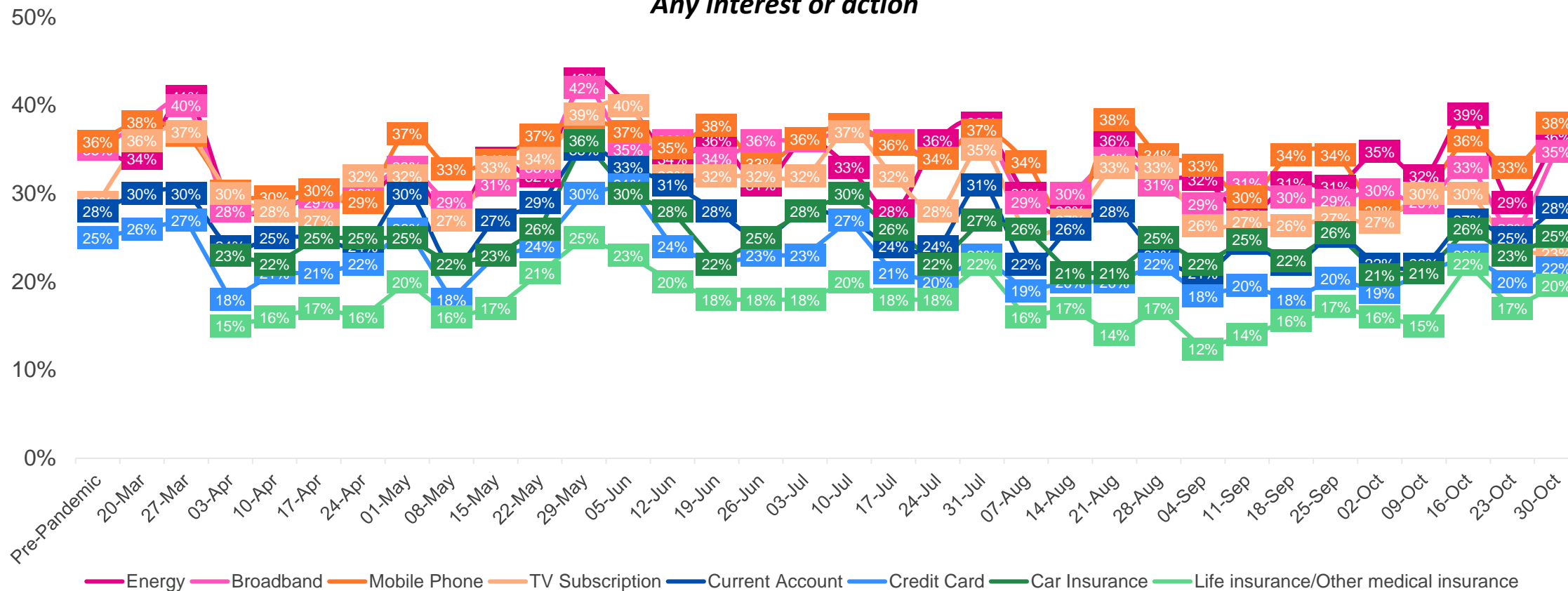
Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 28/08:250, 04/09:250, 11/09:250, 18/09:250, 25/09:250, 02/10:250, 09/10:250, 16/10:250, 23/10: 254, 30/10: 250.



Interest in switching subscriptions or services has increased after a notable dip last week, with the exception of TV Subscriptions

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

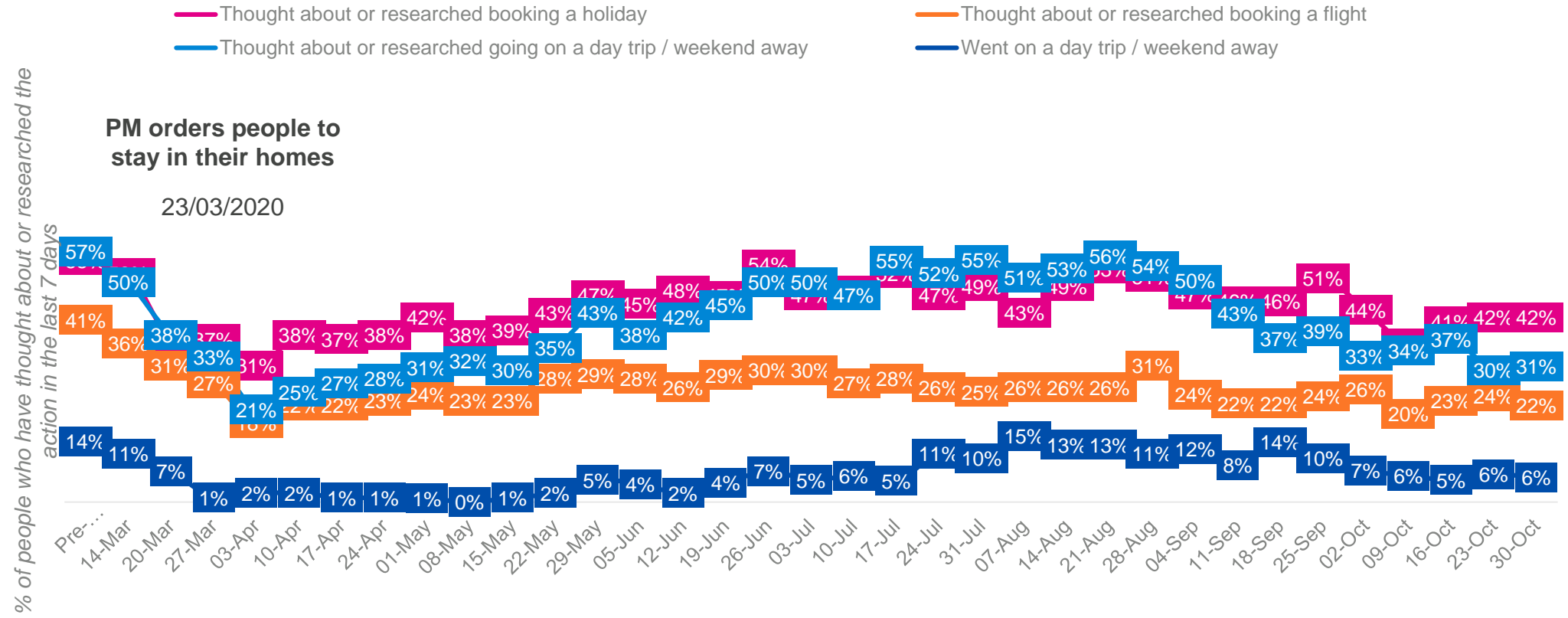
Any interest or action



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, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 28/08:250, 04/09:250, 11/09:250, 18/09:250, 25/09:250, 02/10:250, 09/10:250, 16/10:250, 23/10: 254, 30/10: 250.

Interest in holidaying remains steady week-on-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



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, 11/09:250, 18/09:250, 25/09:250, 02/10:250, 09/10:250, 16/10:250, 23/10: 254, 30/10: 250.

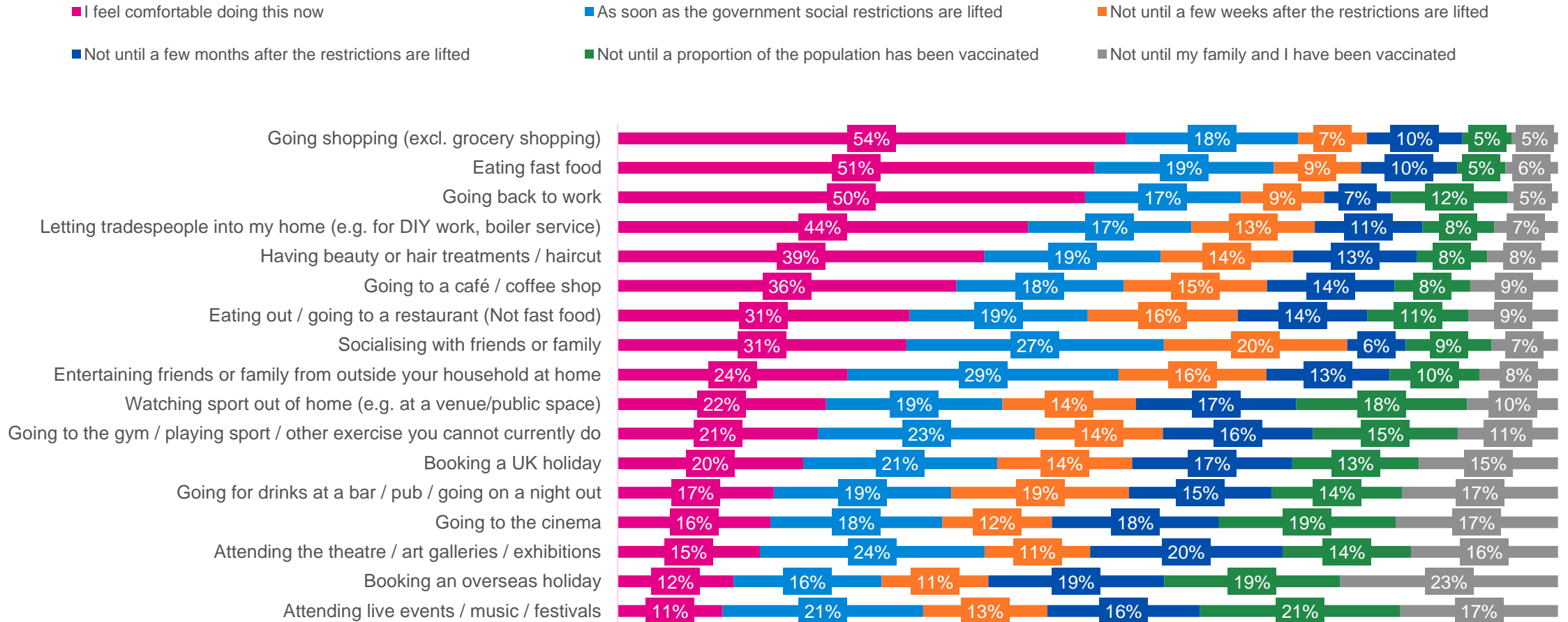


Looking ahead



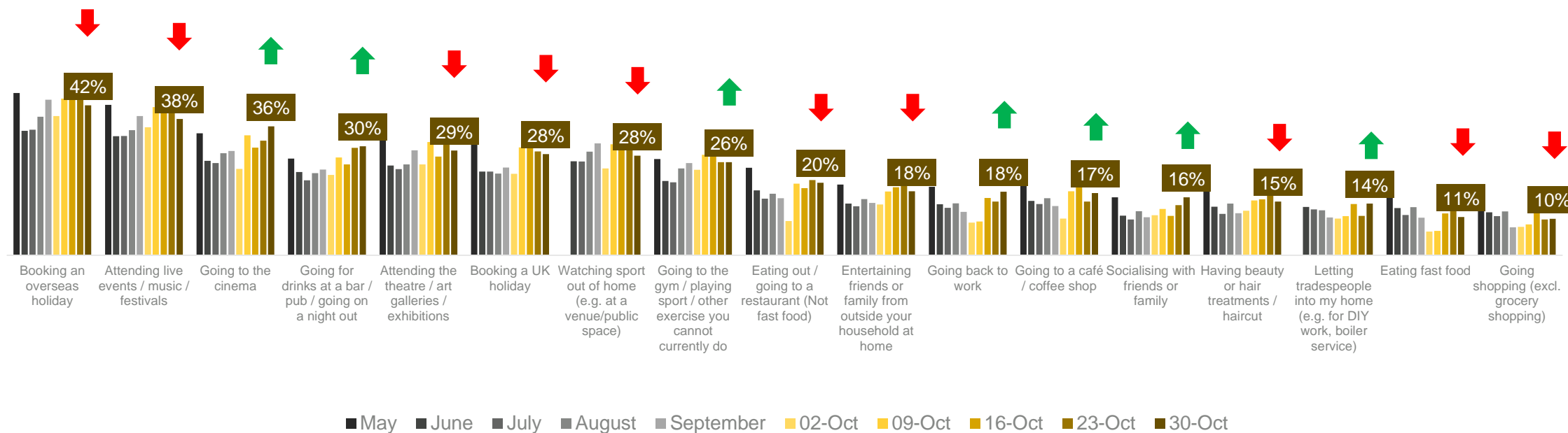
There have been declines in the percentage of people who feel comfortable eating out (-5ppts), going for drinks (-4ppts) or socialising (-3ppts) this week

When would you feel comfortable doing the following again?



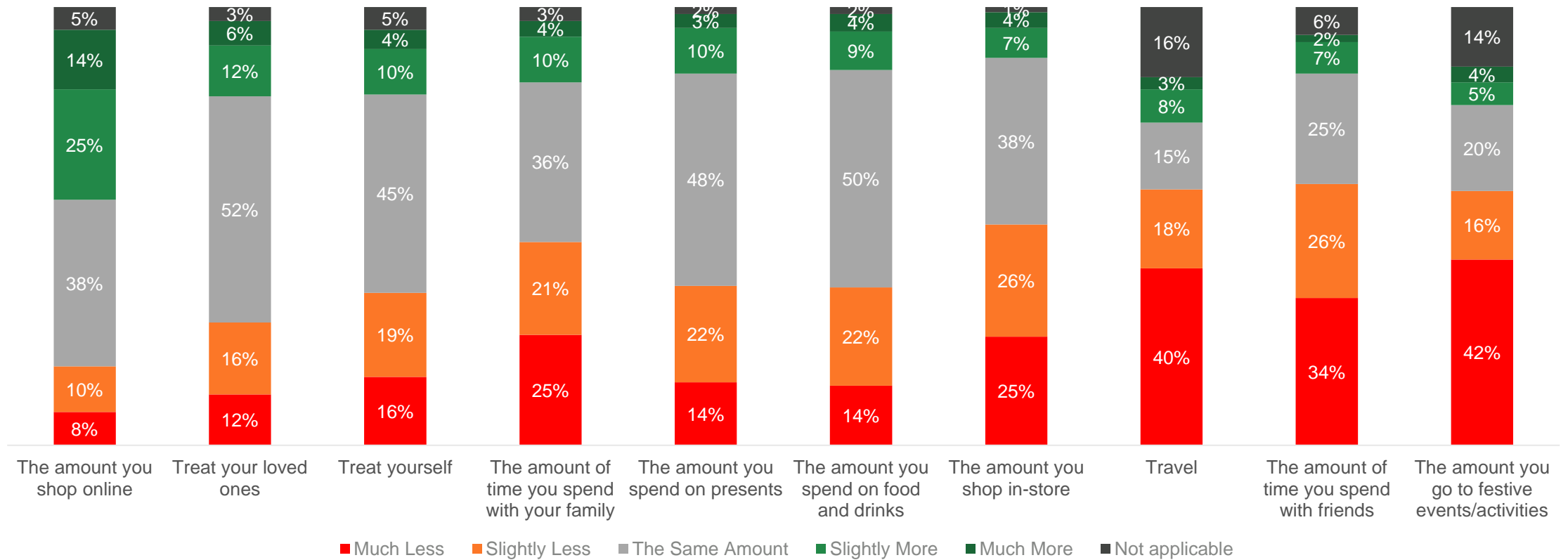
Fewer people would wait for a vaccine before holidaying in the UK or abroad when compared to last week

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)



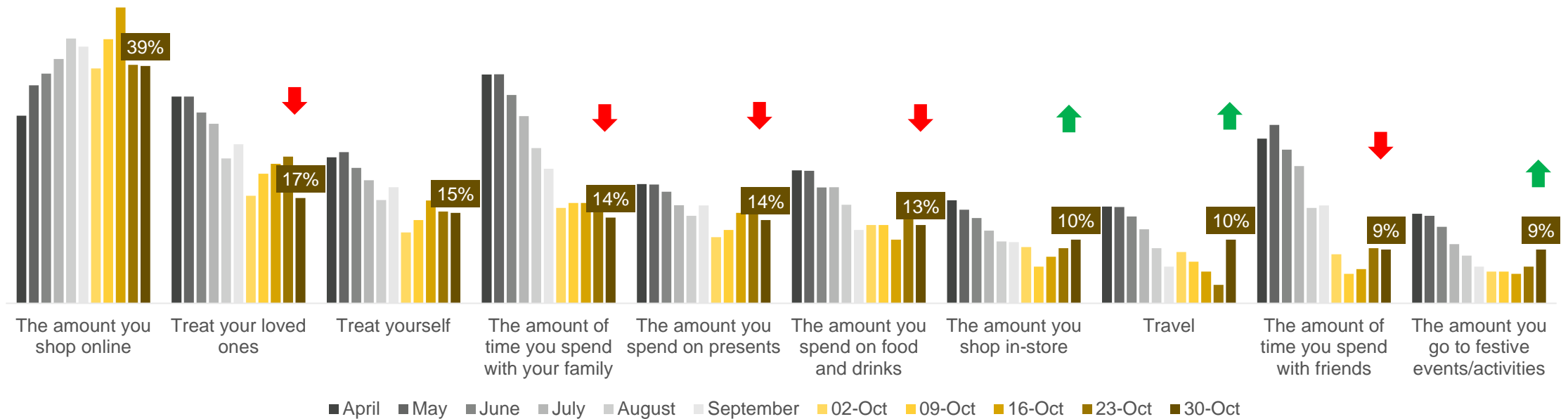
6 in 10 people expect to spend less time with friends this Christmas

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 dip in intent to indulge this Christmas, with fewer people intending to spend more on presents, food and drinks and treating loved ones

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)

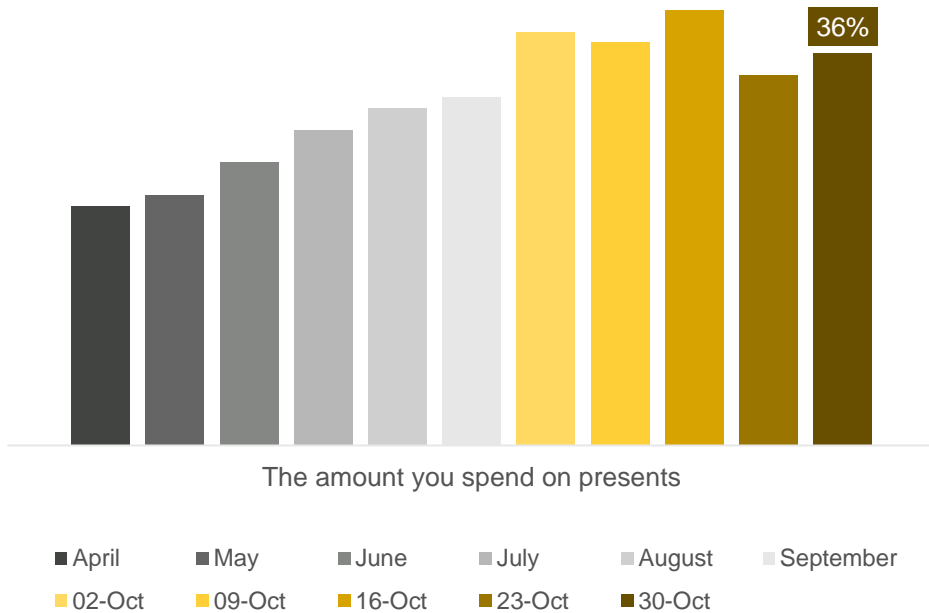


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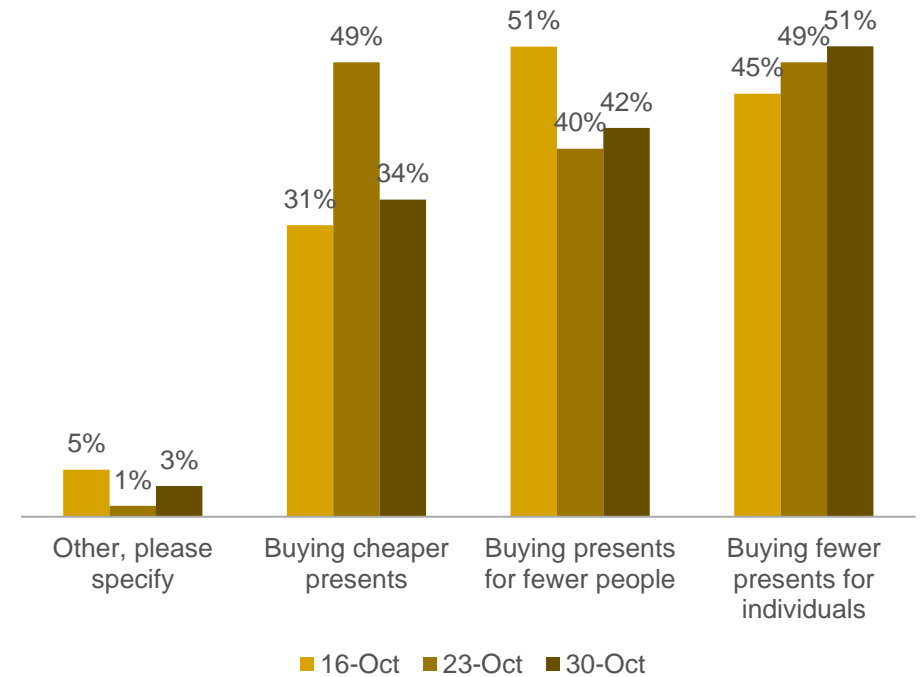
Those spending less on Christmas presents expect to buy fewer presents this year and for fewer people

Shoppers expect to buy cut back on the amount purchased, rather than purchasing 'cheaper' 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 less / Much less)



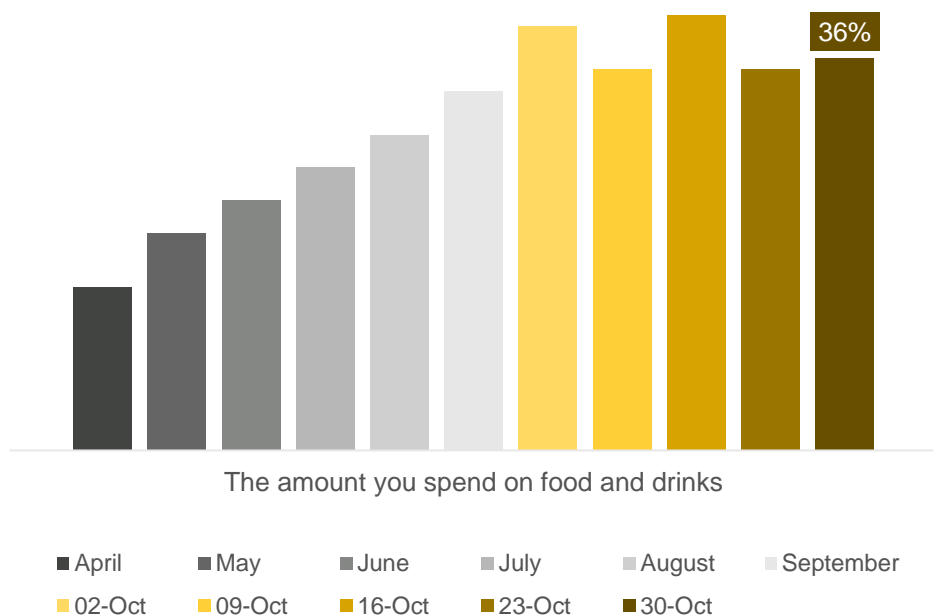
You said that you will be spending less on presents this year, how will you be doing so?



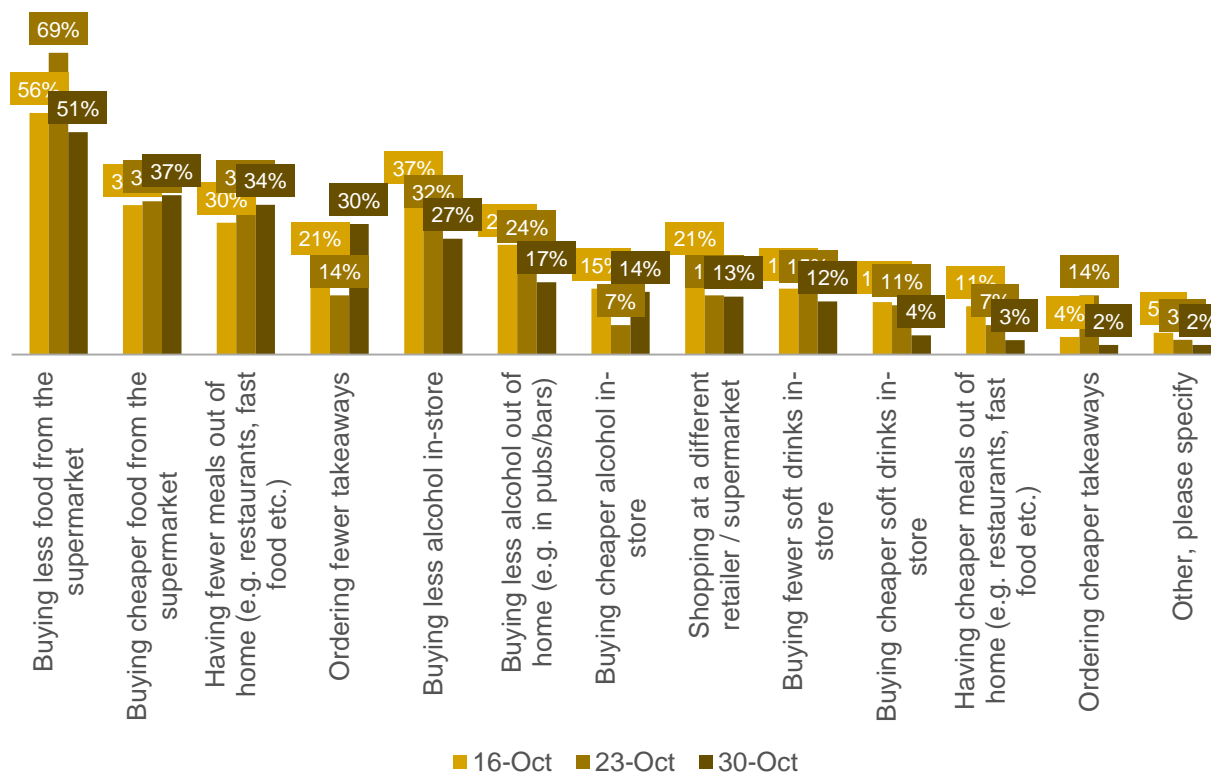
Cutting back on the amount of food purchased is the primary way that shoppers expect to spend less on food and drinks this Christmas

As with gifting, shoppers expect to buy cut back on the amount purchased, rather than purchasing 'cheaper' items across product categories

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



You said that you will be spending less on food and drinks this year, how will you be doing so?

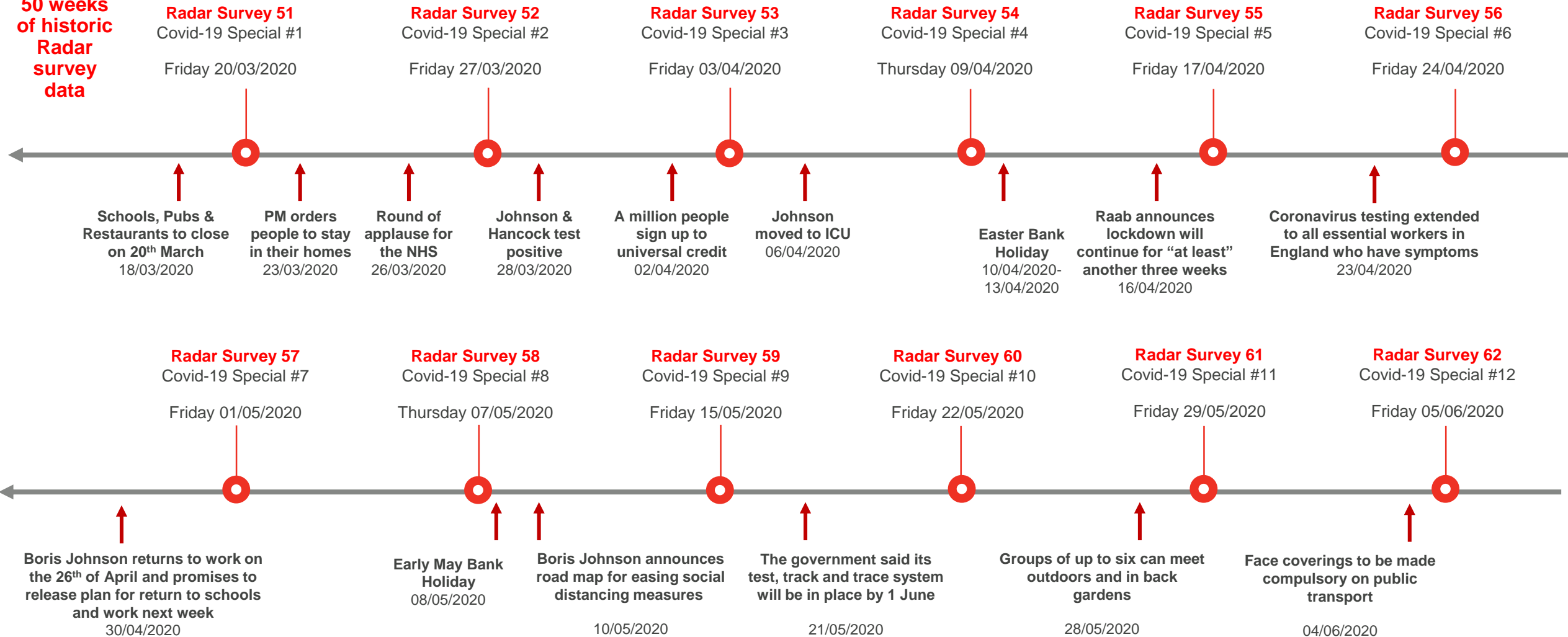


Appendix



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



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



Bank Holiday
31/09/2020





Survey Timeline

74 weeks
of historic
Radar
survey
data

Radar Survey 75
Covid-19 Special #25
Friday 04/09/2020

Radar Survey 76
Covid-19 Special #26
Friday 11/09/2020

Radar Survey 77
Covid-19 Special #27
Friday 18/09/2020

Radar Survey 78
Covid-19 Special #28
Friday 25/09/2020

Radar Survey 79
Covid-19 Special #29
Friday 02/10/2020

Radar Survey 80
Covid-19 Special #30
Friday 09/10/2020

↑
'Eat Out to Help Out' ends for most restaurants
01/09/2020

↑
Government announces revised restrictions on social gatherings – limiting to 6 people
09/09/2020

↑
Revised government restrictions on social gatherings come into place
14/09/2020

↑
PM warns UK to follow COVID restrictions or risk second lockdown
22/09/2020

↑
Chancellor of the Exchequer announces Winter Economy Plan
24/09/2020

↑
Extended local lockdown measures in the North East
01/10/2020

↑
Boris to announce tiered approach to lockdown measures
12/10/2020

Radar Survey 81
Covid-19 Special #31
Friday 16/10/2020

Radar Survey 82
Covid-19 Special #32
Friday 23/10/2020

Radar Survey 83
Covid-19 Special #33
Friday 30/10/2020

↑
London moved to Tier 2 COVID alert level
15/10/2020

↑
Greater Manchester and areas in the Midlands move to Tier 3
20/10/1010-23/10/2020

↑
PM announces month-long national lockdown to commence 05/11/2020
31/10/2020