

**COVID-19 Consumer Impact Report**  
w/c 23.11.20

**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 85 weeks, surveyed over 25,000 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 20<sup>th</sup> November to Sunday 22<sup>nd</sup> November 2020.



## Summary: Happiness levels have declined this week, however advances in vaccine trials has boosted optimism and festive spirits have increased

- 01** **Happiness levels** have dipped this week, dropping by 5ppts from 37% to 32%, now at similar levels to those experienced in the first lockdown.
- 02** Comparing Lockdown #2 to Lockdown #1, the nation feel **significantly less optimistic**, with fewer feeling satisfied by life, and that their life is worthwhile.
- 03** The percent that claim to be actively supporting **local businesses** during COVID has increased **5ppts** in the last week from **55%** to **60%**, however with a **2ppt** increase in the percentage of people reporting that **money is tight** (57%), the percent trying **new brands** during lockdown has **decreased this week**.
- 04** The lifting of lockdown on 2<sup>nd</sup> December still looked **unlikely for half of the nation**, however advances in Vaccine trials has significantly **increased the nation's optimism**. The news of the potential effective vaccine has also increased optimism towards 2021 **holidays** (+7ppts) and **activities** (+9ppts) this week.
- 05** **Festive spirits** have increased significantly this week (feeling festive/chritmassy has increased from 4.5 to 4.8 on average), and more people report that they will **spend more on presents this year** (+4ppts to 17%).
- 06** **70%** have already **purchased a Christmas gift this year**, with most purchases being made online.



**Life satisfaction,  
optimism & consumer  
confidence**



# Happiness levels have dipped this week, now at similar levels to those experienced in the first lockdown



Happiness levels have decline this week, dropping by 5ppts from 37% to 32%



Optimism has increased slightly this week by 1ppt from 17% to 18%

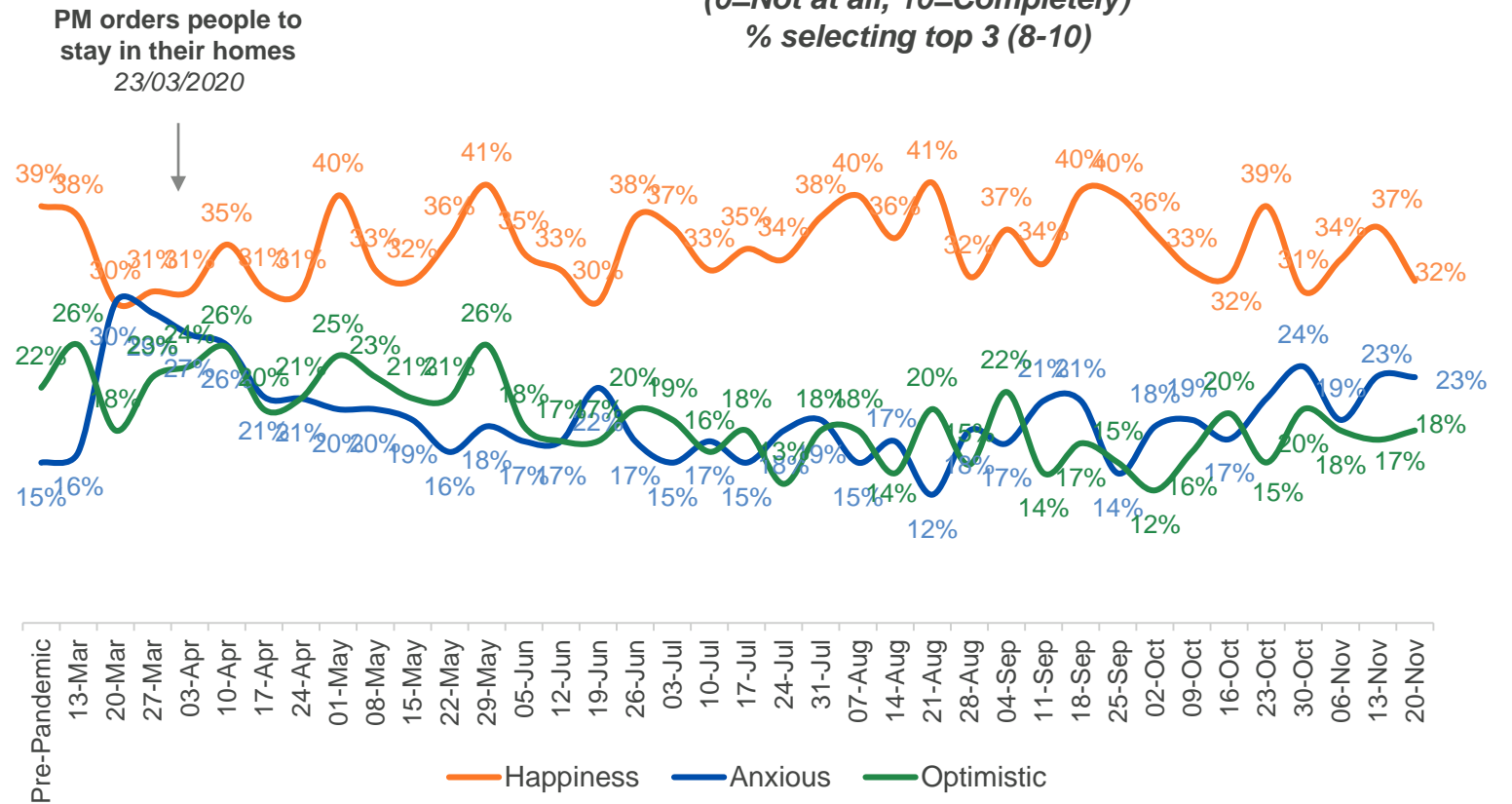


Life satisfaction has remained the same at 31%.



Anxiety remains the same at 23% this week.

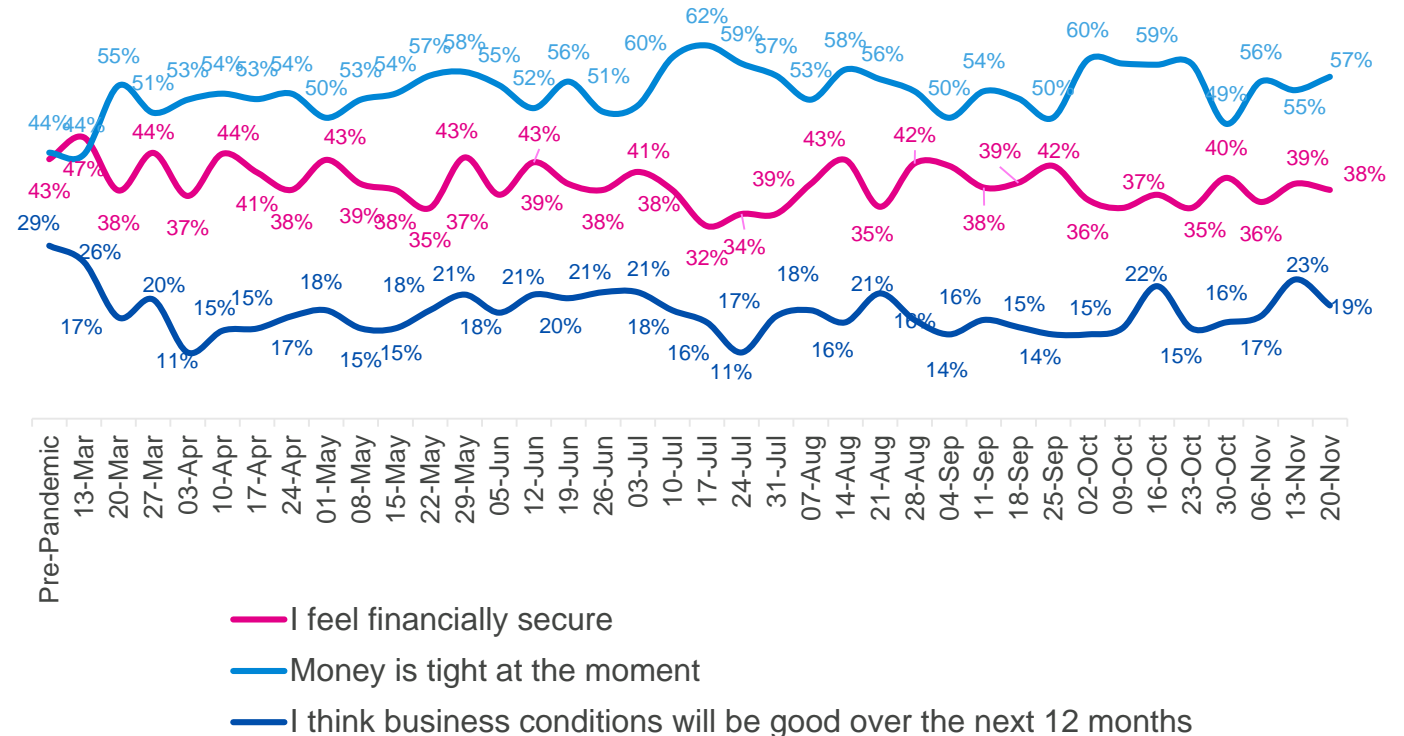
Overall, how Happy/ Anxious/ Optimistic did you feel yesterday?  
(0=Not at all, 10=Completely)  
% selecting top 3 (8-10)





# Over half of the UK continue to report that money is tight at the moment, with only a fifth of people optimistic about future business conditions

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 1ppt decrease in the percentage of people feeling financially secure this week, now at 38%



There has been a 2ppt increase in the percentage of people reporting that money is tight, now at 57%

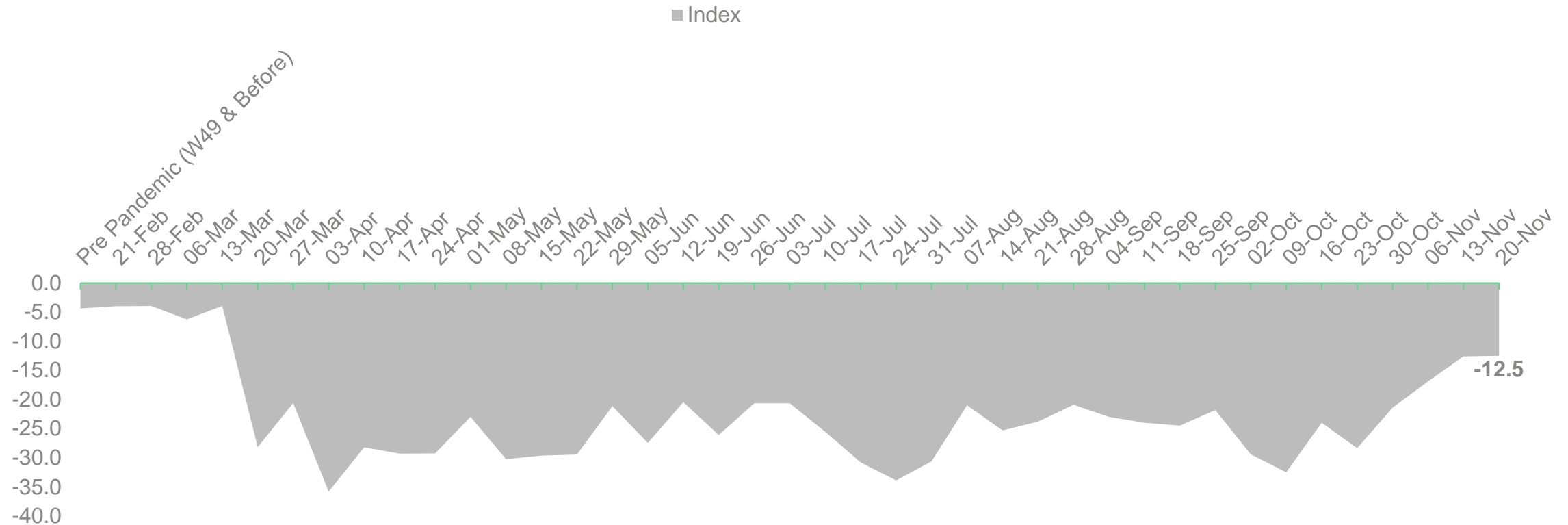


Confidence in future business conditions has dropped this week, falling from 23% to 19% in the last 7 days





# Consumer Confidence has improved marginally this week, now at -12.5, however 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.*



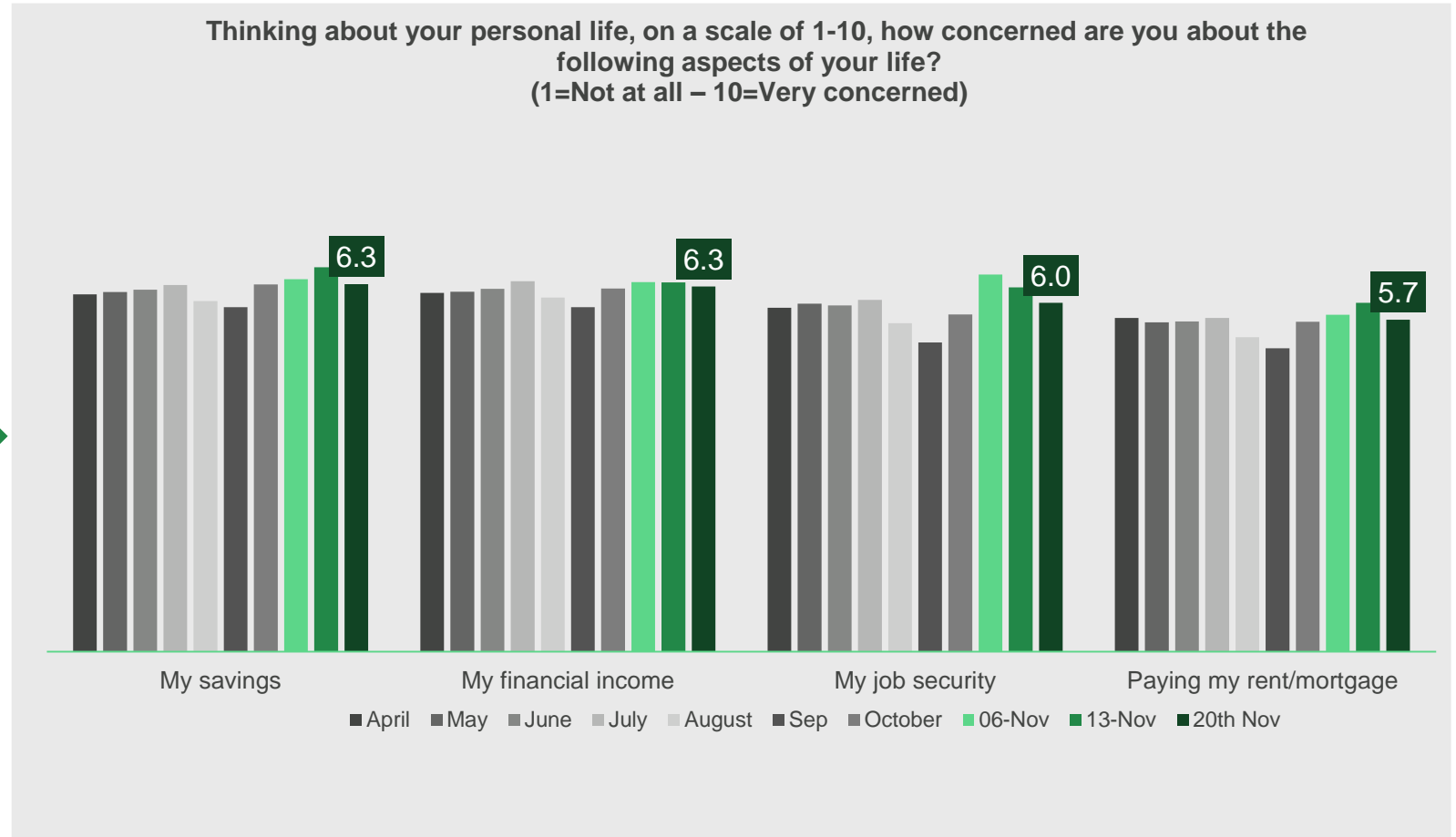
# Concerns over job security have dropped slightly this week as the proportion of people furloughed has increased to 1 in 5

**20%** of households have someone that has been **furloughed**

**9%** of households contain someone that has had their **salary reduced** since the COVID-19 outbreak

**8%** of households include someone that has **been made redundant** since the COVID-19 outbreak began

**58%** say that **their employer has been supportive** during the COVID-19 outbreak

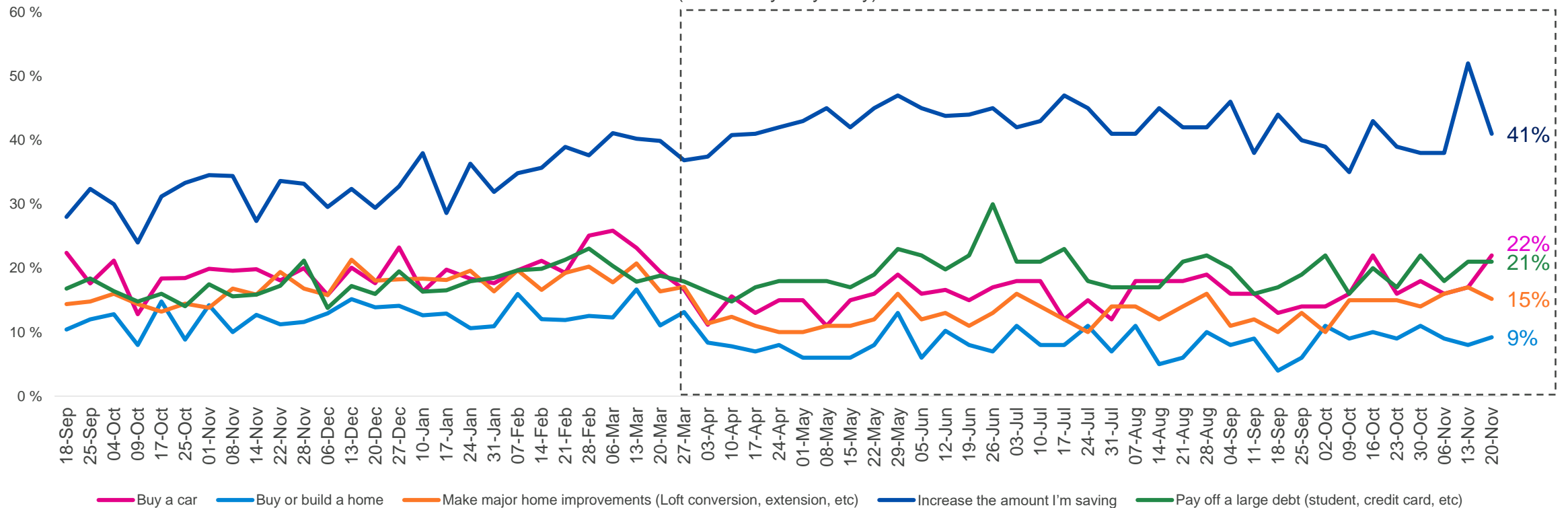




# Those planning to increase the amount they are saving has seen a sharp decline back to 41% this week

There are increases in likelihood to make major financial purchases and outgoings, except for home buying

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

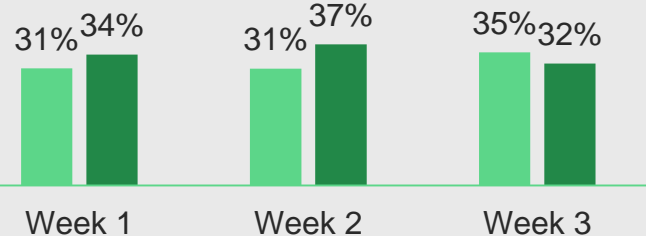


Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 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, 06/11:250, 13/11:251, 20/11:250

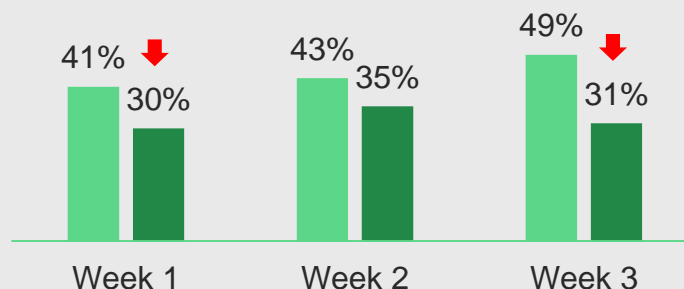


# Comparing Lockdown #2 to Lockdown #1, the nation feel significantly less optimistic, with fewer feeling satisfied by life, and that their life is worthwhile

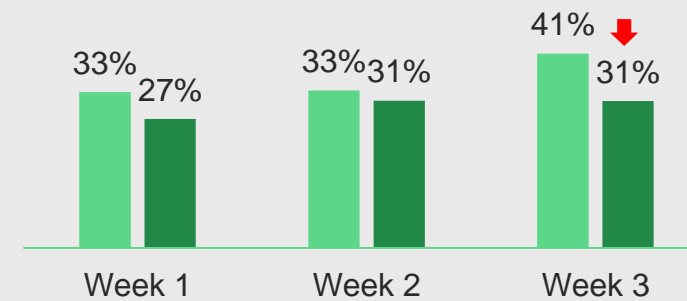
### Happy % agree



### Worthwhile % agree

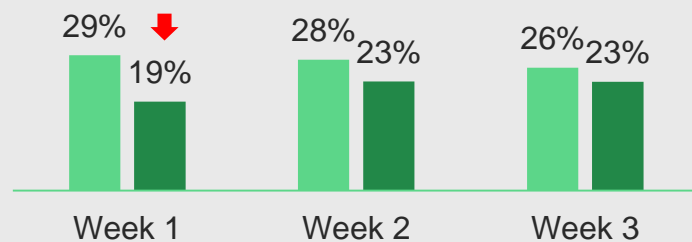


### Life Satisfaction % agree

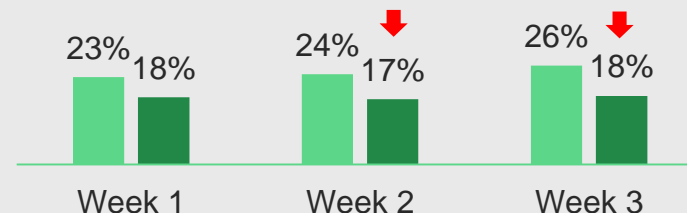


### Anxiety % agree

■ Lockdown 1  
■ Lockdown 2



### Optimism % agree



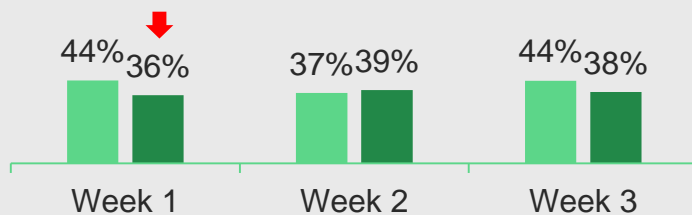
↑ ↓ Shows significant difference at 95%



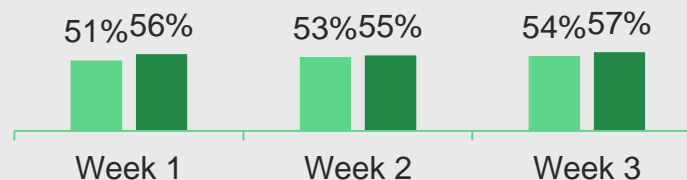
# From a financial point of view, perceptions are not significantly different in Lockdown #2 as they were in Lockdown #1

■ Lockdown 1 ■ Lockdown 2

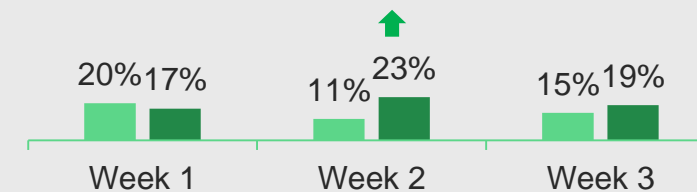
**I feel financially secure**  
*% agree*



**Money is tight at the moment**  
*% agree*



**Business conditions will be good in the next 12 months**  
*% agree*



↑↓ Shows significant difference at 95%

# Confidence in Government & Broad Concerns



# Confidence in the Government's response remains low at 31% this week

Many feel that the Government are slow to make decisions, which is impacting the UK's ability to combat the virus:

*"I think the government has acted too late and let things get worse than what they needed to get"*

*"They should have done far more far sooner to prevent the disease spreading"*

*"They should have stopped planes arriving in March. They locked down far too late, had no PPE then unlocked too soon. They are also going to unlock too soon at Xmas."*

Many have lost confidence that the Government know what they are doing and have a clear strategy to get through the pandemic:

*"Clear they have no understanding and are just lurching from crisis to crisis"*

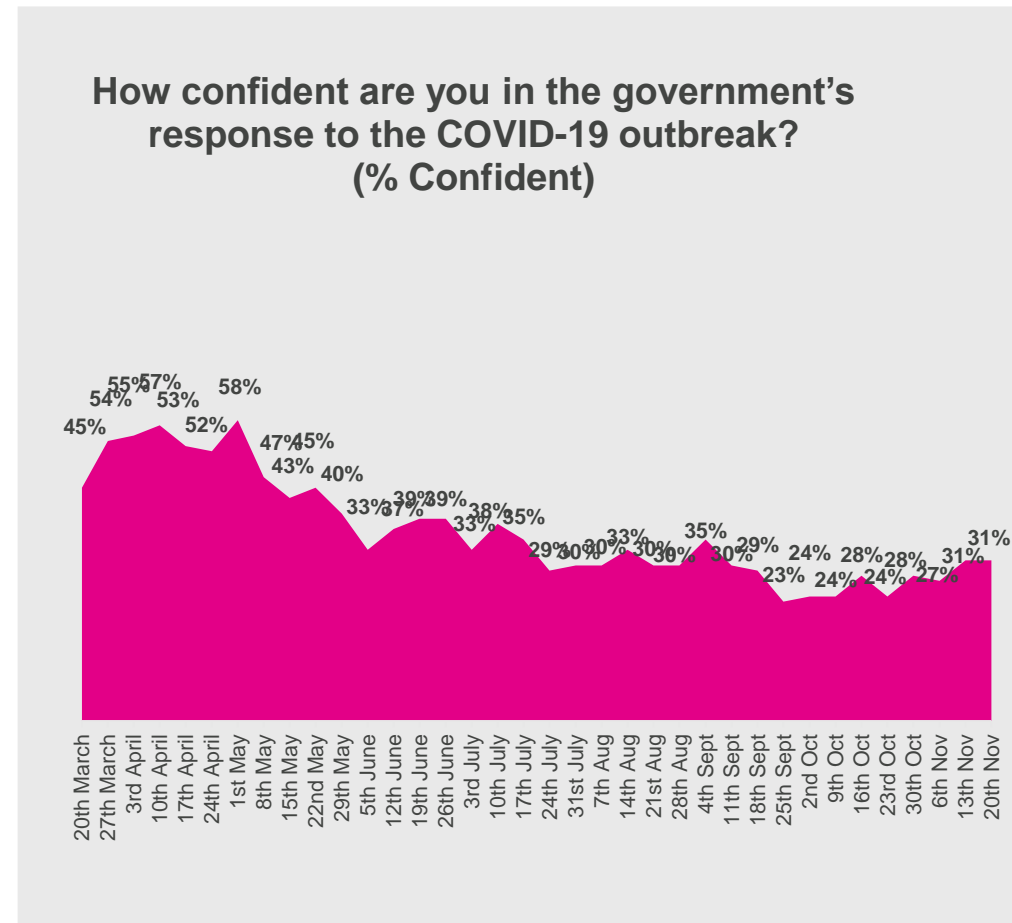
*"Because no one in charge knows what they're doing."      "They have not got a clue"*

*"They don't know what to do next"      "They are doing everything backwards"*

Many people have lost trust in the Government and their priorities:

*"Because I have no faith whatsoever in our government. They are corrupt and lie all the time."*

*"We're managed by self satisfying bumbling fools"*

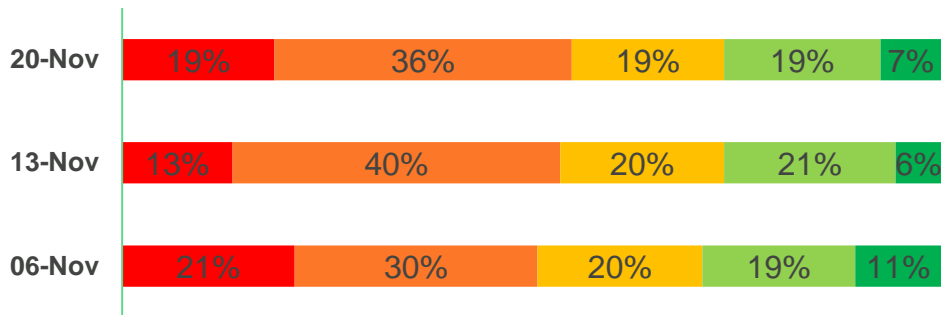


# The lifting of lockdown on 2<sup>nd</sup> December still looked unlikely for half of the nation, but advances in Vaccine trials has significantly increased the nation's optimism

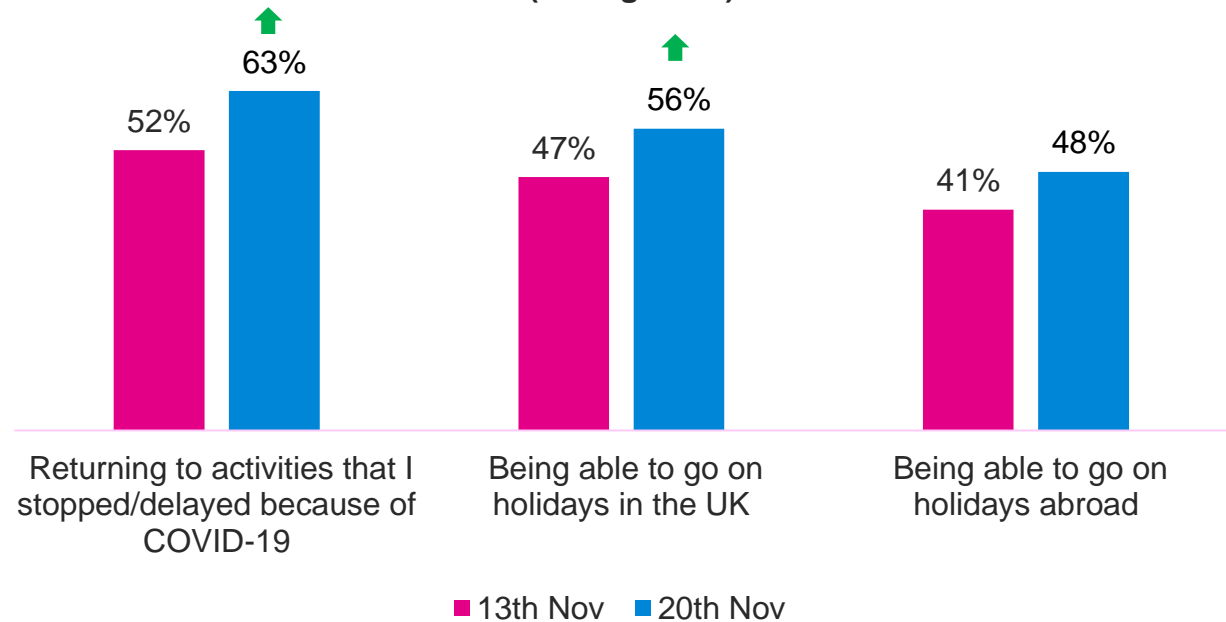
**55%**  
of people in England think that is unlikely that the current national lockdown will end on 2<sup>nd</sup> December

How likely do you think it is that the current national lockdown in England will end on 2nd December 2020?

■ Very Unlikely ■ Quite Unlikely ■ Neither Likely nor Unlikely ■ Quite Likely ■ Very Likely



The extent to which people agree that news around a potential vaccine for COVID-19 in 2021 has made them optimistic about: (Net Agree %)

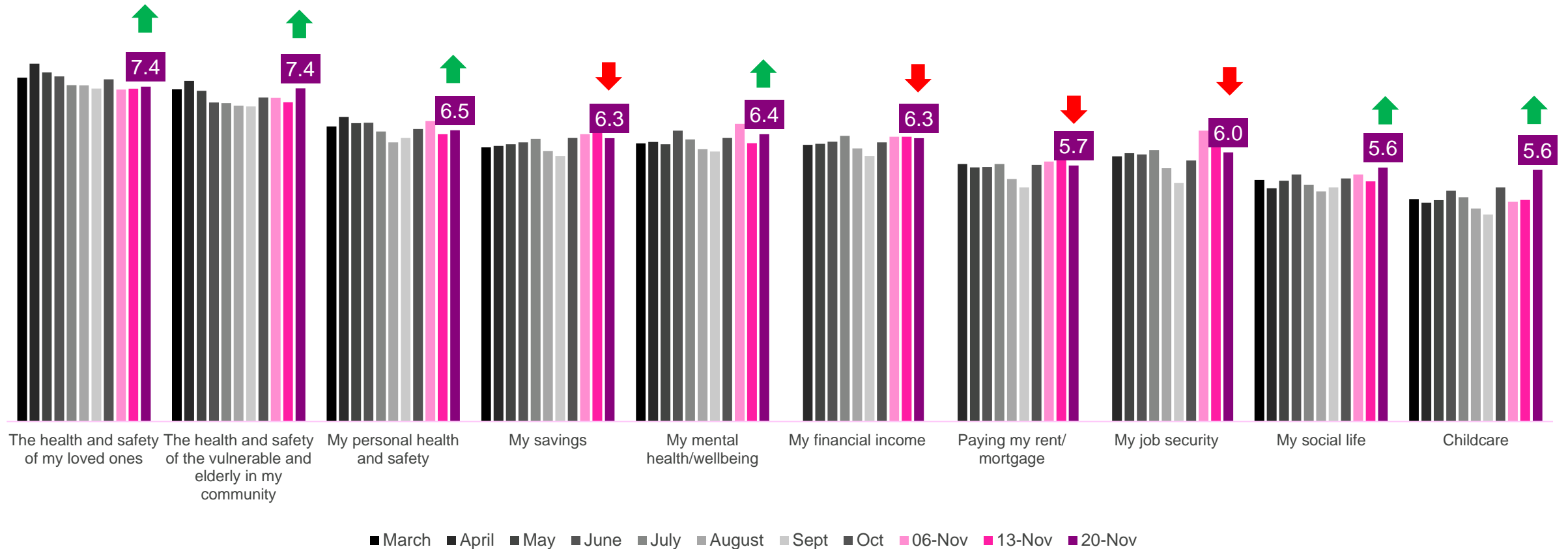






# Concerns over both physical and mental health has increased this week, alongside concerns over social life and childcare

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)

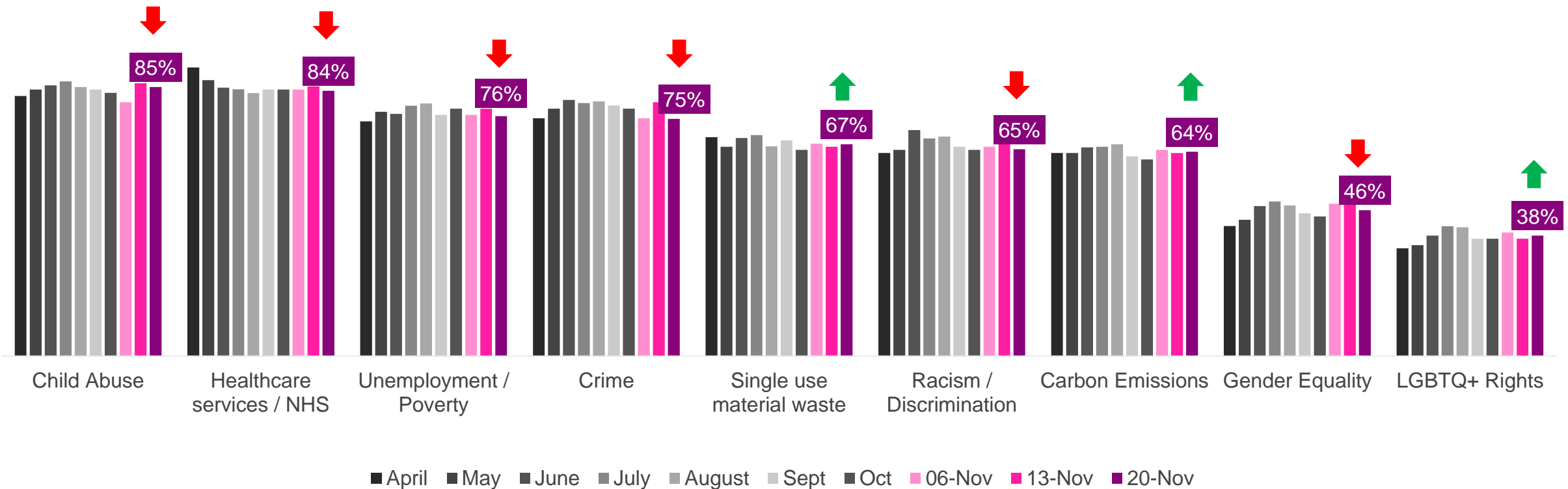


Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 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, 06/11:250, 13/11:251, 20/11:250.



# Most societal concerns have decreased again this week, with Crime and Racism/Discrimination seeing the sharpest declines

How concerned are you about the following topics?  
(Concerned / Very Concerned)



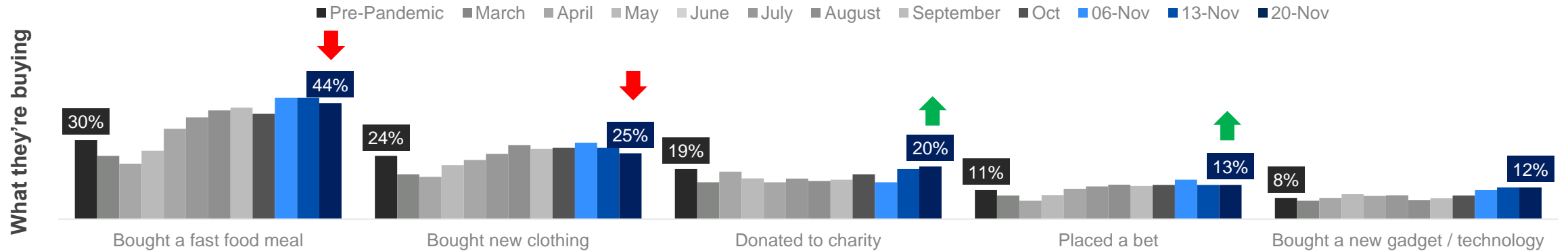
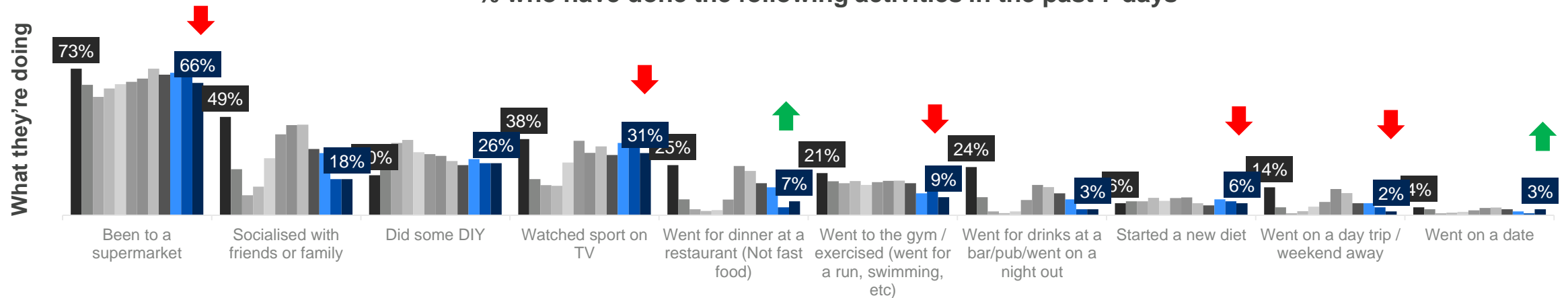
Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 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, 06/11:250, 13/11:251, 20/11:250

# Changes in Behaviour



# Supermarket visits have decreased 3ppts this week, and purchases of fast food and clothing have also dropped

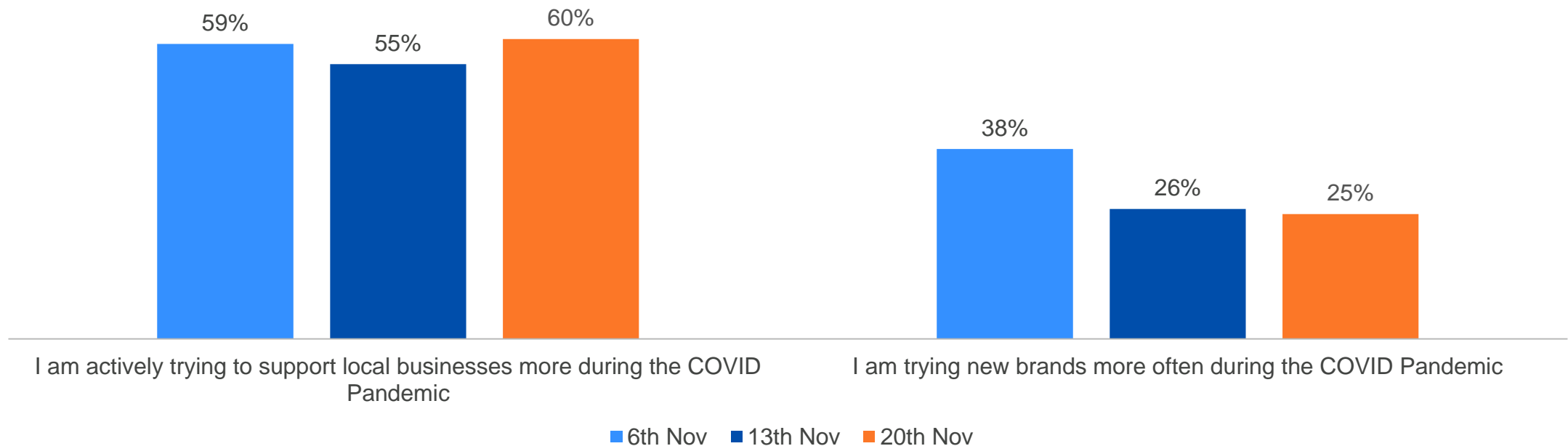
% who have done the following activities in the past 7 days



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, 06/11:250, 13/11:251, 20/11:250

# The percent that claim to be actively supporting local businesses during COVID has increased 5ppts in the last week

To what extent do you agree with the following statements?  
(Net Agree %)

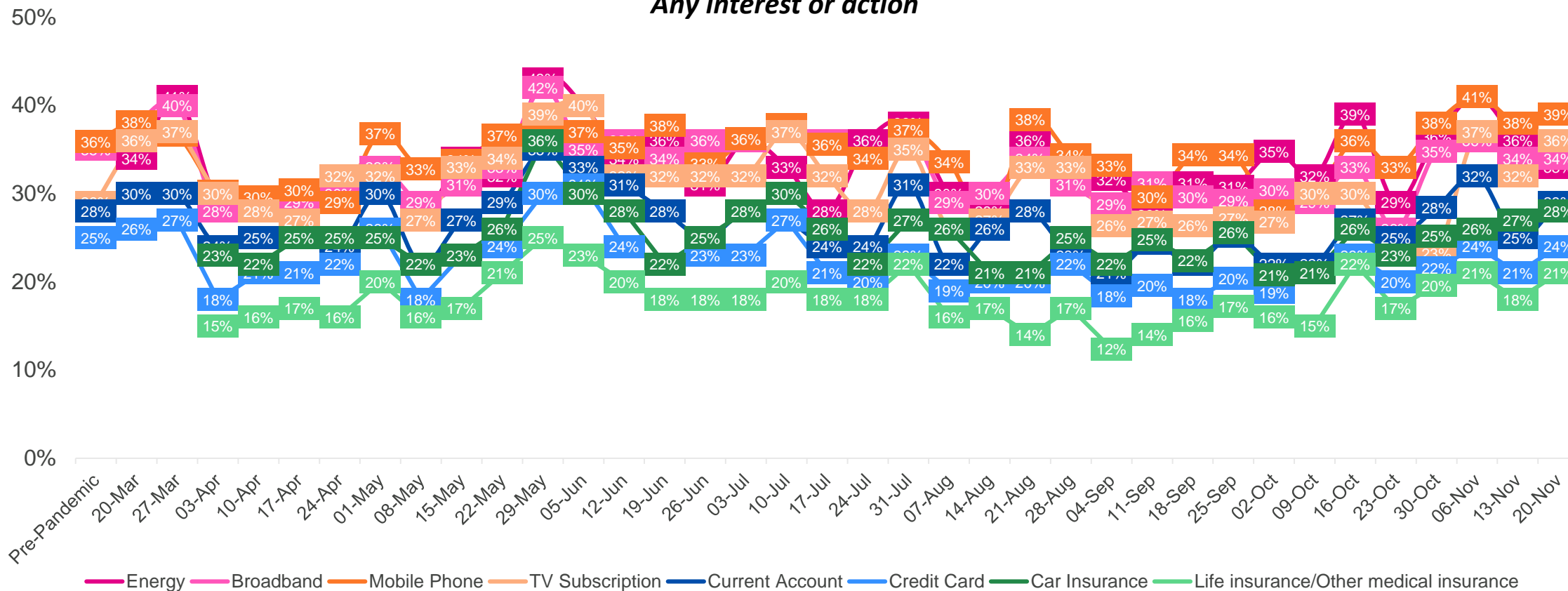




# Interest in switching subscriptions or services has increased for TV subscriptions (4ppts), Credit Cards (3ppts) and Life insurance (3ppts)

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

*Any interest or action*

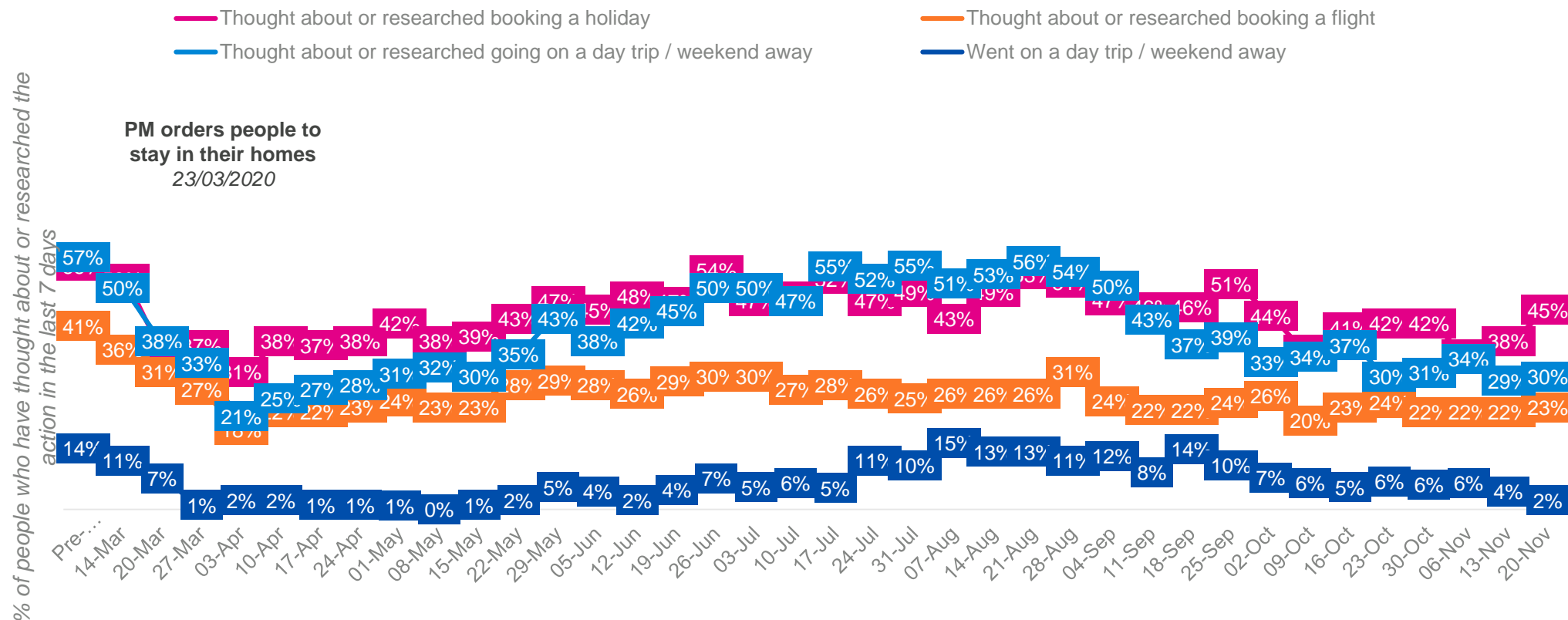


Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 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, 06/11:250, 13/11:251, 20/11:250



# Interest in holidaying has increased in the last 7 days, however actual booking of flights and holidays remains low

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





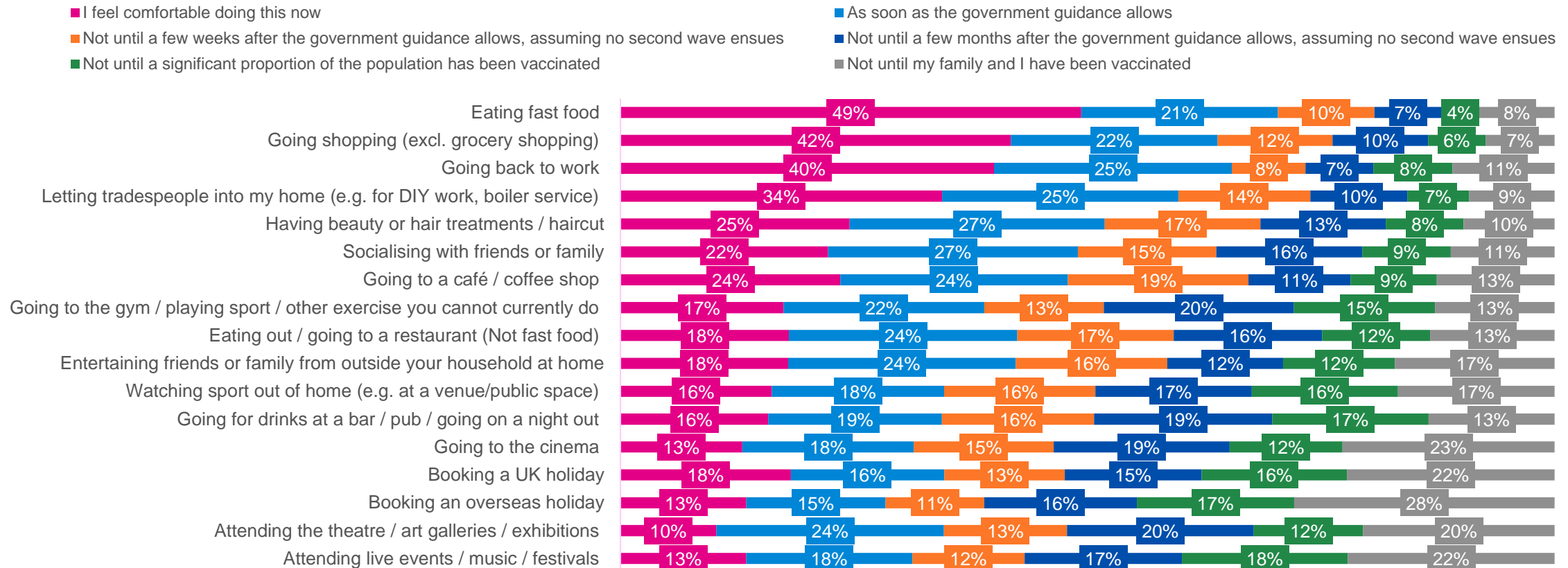
**Looking ahead**



# The top activities that the UK are comfortable doing are eating fast food, grocery shopping and going back to work

There have been increases in the percentage of people feeling comfortable socialising with friends and family (2ppts) this week, as well as having beauty or hair treatment (+6ppts). There have been also notable increases in people feeling comfortable booking a UK holiday (+9ppts)

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

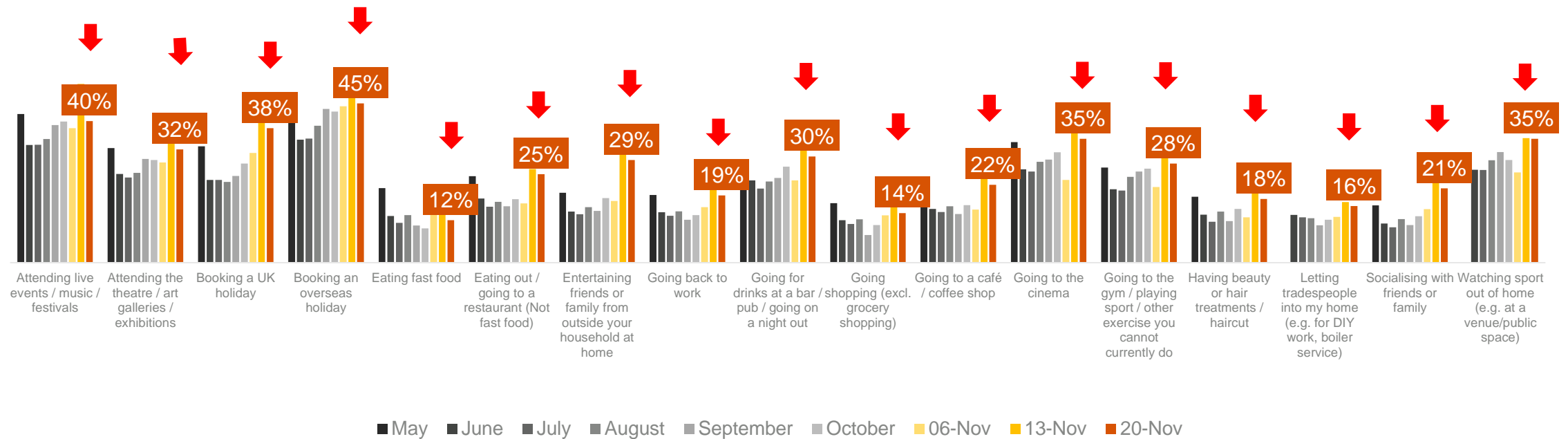




# The percent of people who would not feel comfortable until a significant proportion of the population has been vaccinated has decreased across all activities

When would you feel comfortable doing the following again?

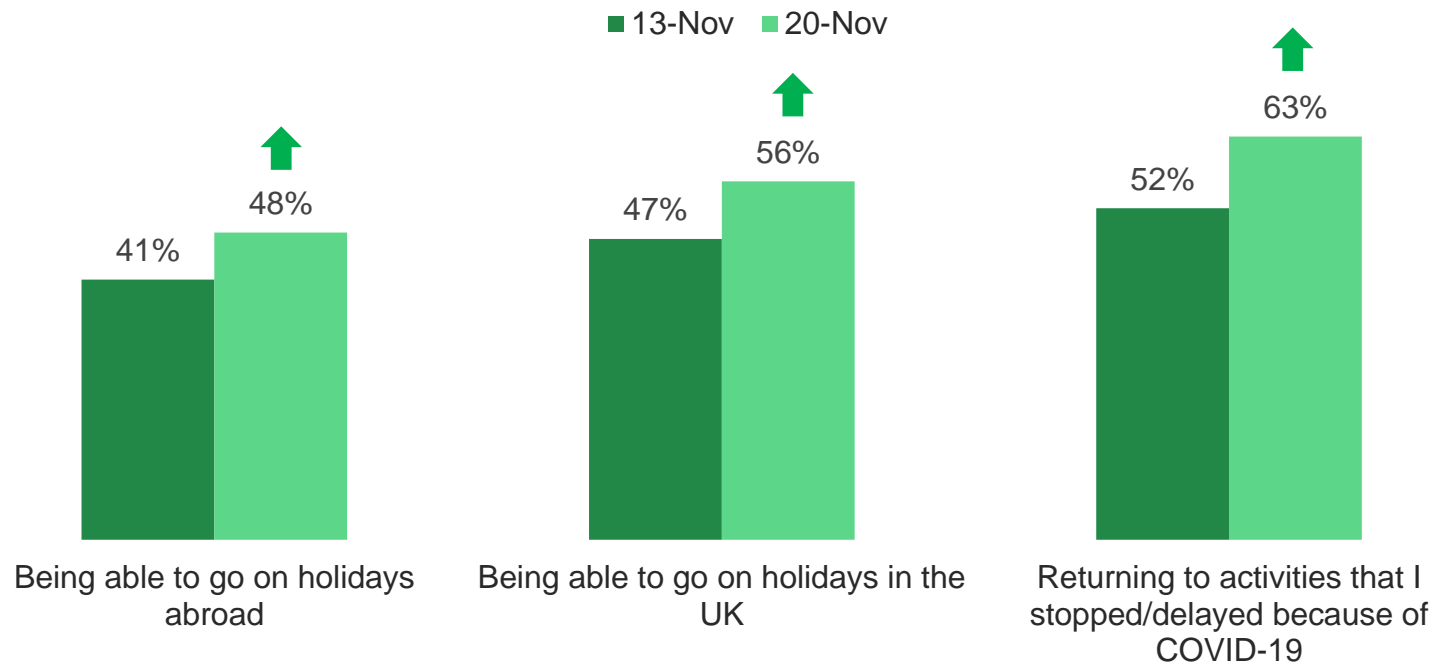
(Not until a significant proportion of the population has been vaccinated / Not until my family and I have been vaccinated)



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, 06/11:250, 13/11: 251

# The news of the potential effective vaccine has also increased optimism towards 2021 holidays and activities this week

The news around a potential vaccine for COVID-19 in 2021 has made me optimistic about...



# CHRISTMAS 2020

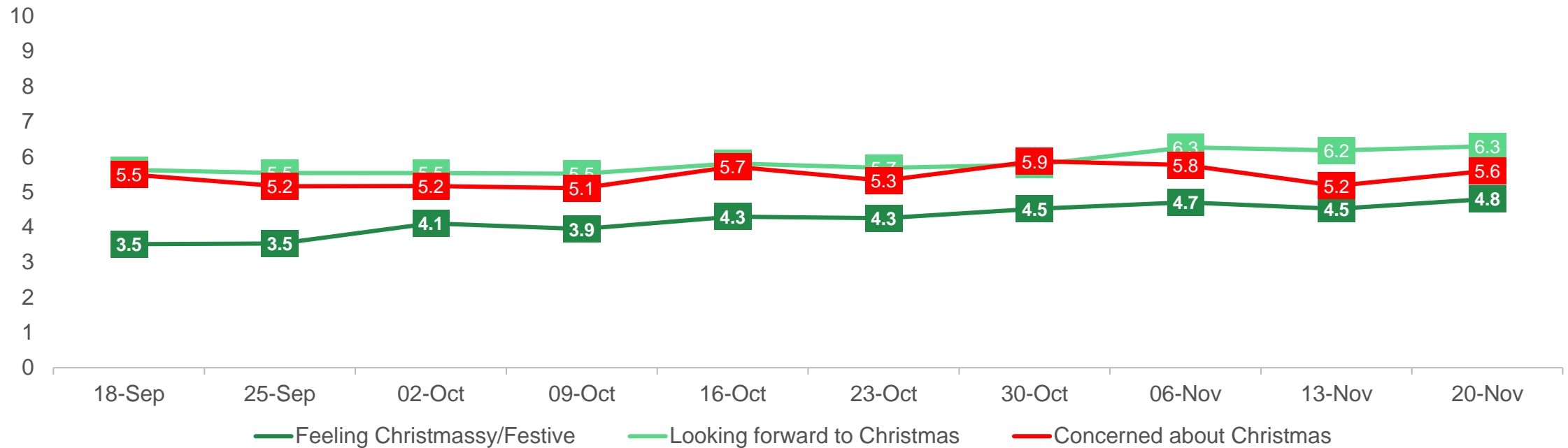
**Expectations for Christmas 2020 have been tracked since April 2020 and additional points have been added through the year and will continue to be added in order to remain as relevant as possible in rapidly changing landscape**



# Festive spirits have increased this week, and more people are looking forward to Christmas

Feeling concerned about Christmas has increased this week from 5.2 to 5.6

On the following scale please tell us how much you are...  
(0=Not at all, 10=Completely)  
MEAN SCORE

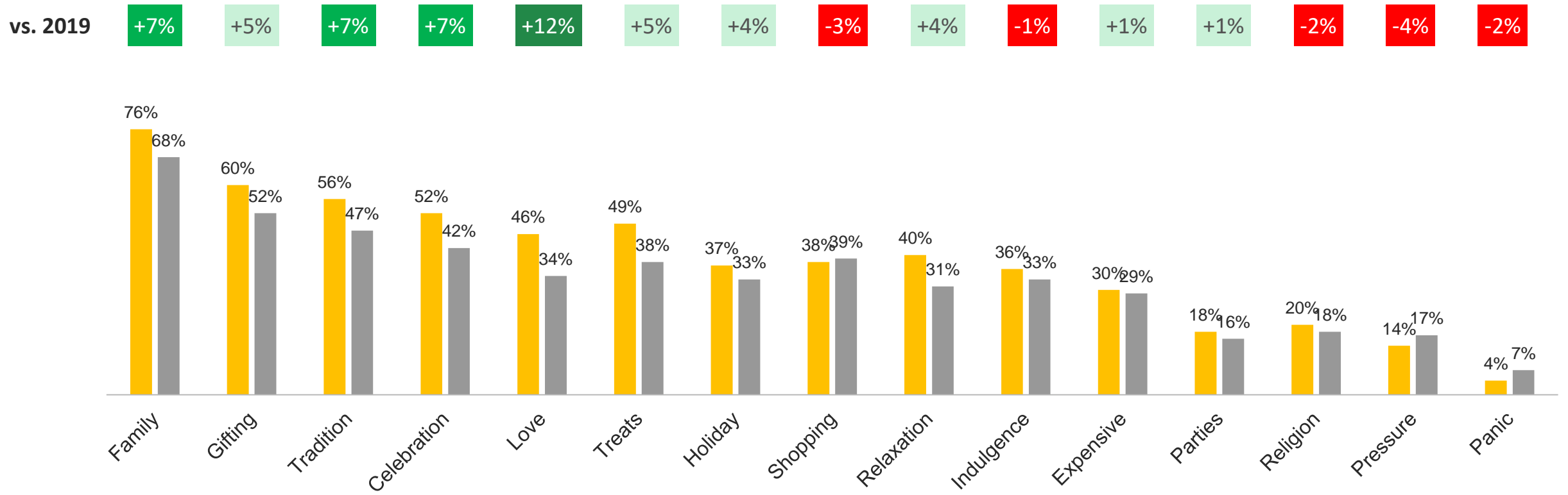




# The meaning of Christmas has shifted more towards Love, Family, Tradition and Celebration this year, and less about Shopping and Pressure

What does Christmas mean to you?

■ 2020 ■ 2019



Source: OMD Radar Survey. 16<sup>th</sup> Oct – 13<sup>th</sup> Nov: 1505. vs. Christmas 2019 Research (2047)

# People value the focus on Family and being at home at Christmas in the ads this year

This year, people appreciate Christmas ads that are uplifting and have an emphasis on homeliness and family connection.

What have you liked most, if anything, about them compared with Christmas advertising that you've seen in the past?

*"I like that they are more small family orientated."*

*"They seem to be focusing more on being at home rather than out at parties etc"*

*"Most of them are all about family and looking out for each other."*

*"The advertisements seem more poignant and emphasise the gathering of generations of loved ones to celebrate their close spirit of love and support."*

*"More authentic, more family orientated"*

What have you disliked most, if anything?

*"Using the pandemic as a means for marketing."*

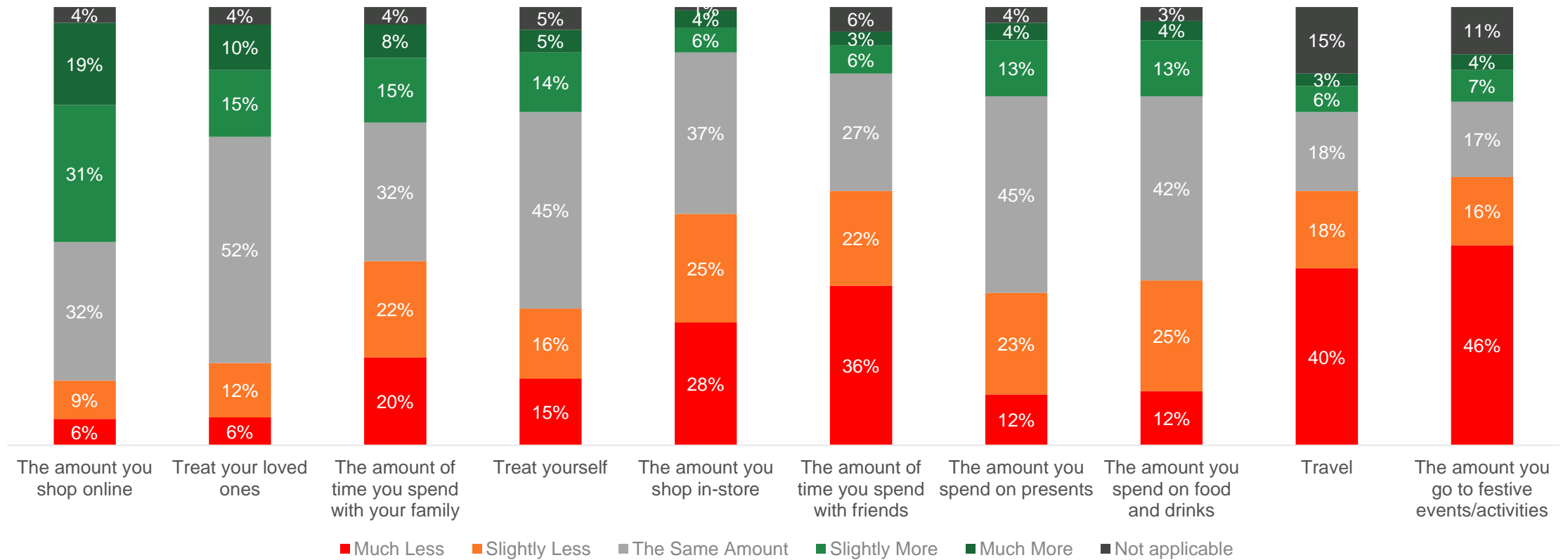
*"I'm actively avoiding watching the adverts as they just remind me of how much I'm dreading Christmas"*

*"Money is tight for lots of people, the ads try to guilt them into buying"*

84% have seen a Christmas ad in the last week an increase of +17ppts from last week's 64%

# The nation continue to expect to have to adapt Christmas this year, predicting to shop online more and spend less time with Family

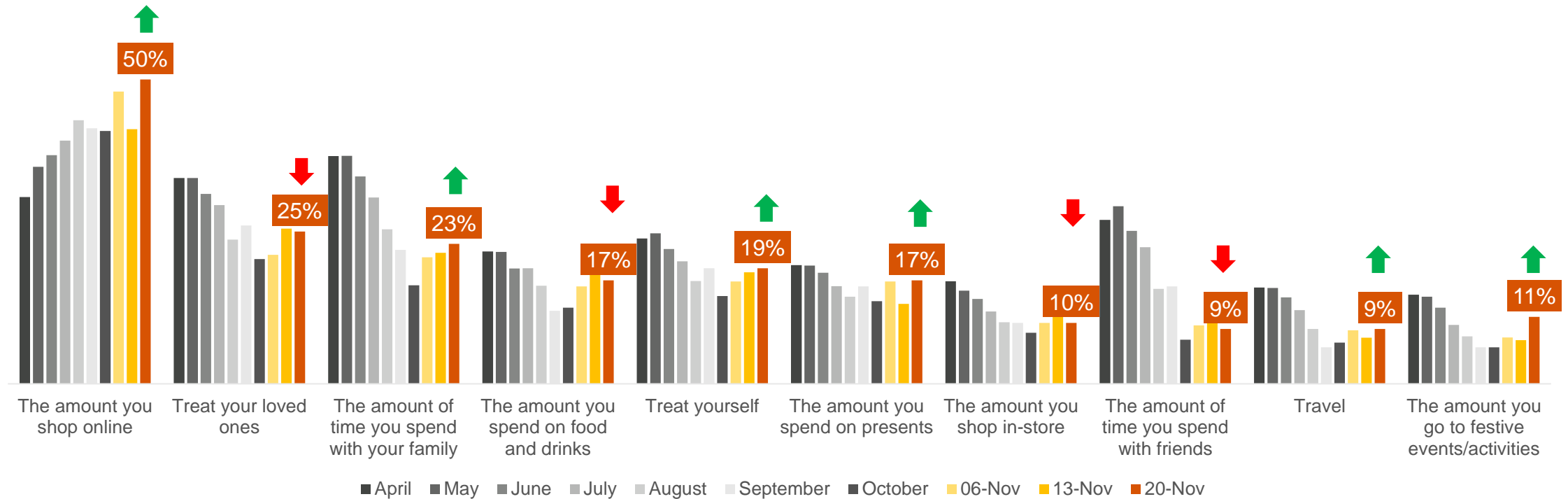
Looking ahead to Christmas 2020, do you think you will do more or less of the following actions compared to Christmas last year?





# There are further increases in the amount that people are expecting to shop online, as well as spending 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)



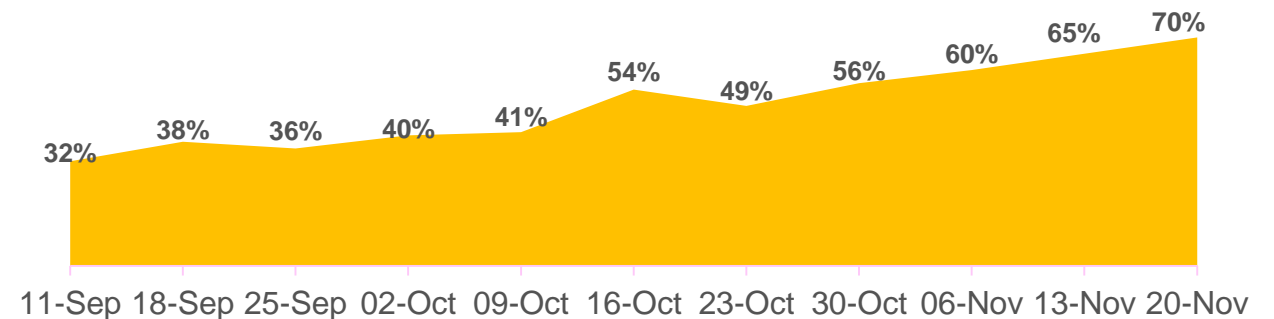
# 70% have already purchased a Christmas gift this year, with the majority of purchases being made online

Estimates of shopping more online are ringing true, with 95% of those who have purchased at least one Christmas gift have purchased a gift online

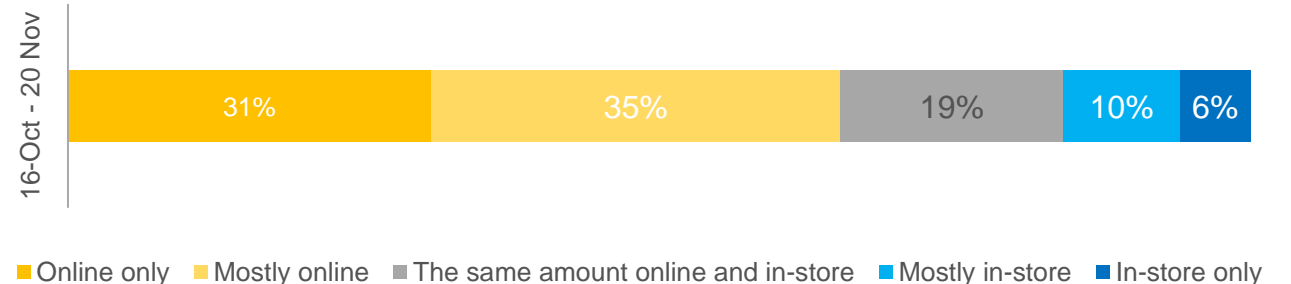
Looking ahead to Christmas 2020, do you think you will do more or less of the following actions compared to Christmas last year?  
(Slightly more / Much more)



Purchased a Christmas present \*



For the Christmas gifts you have bought so far, which best describes how you've purchased them? \*\*



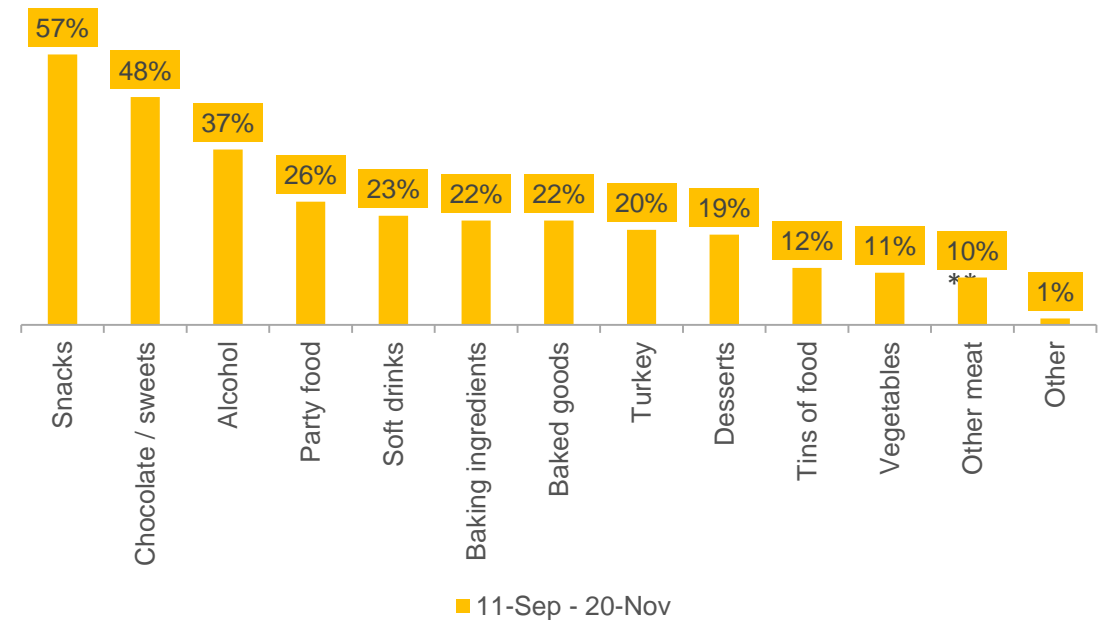
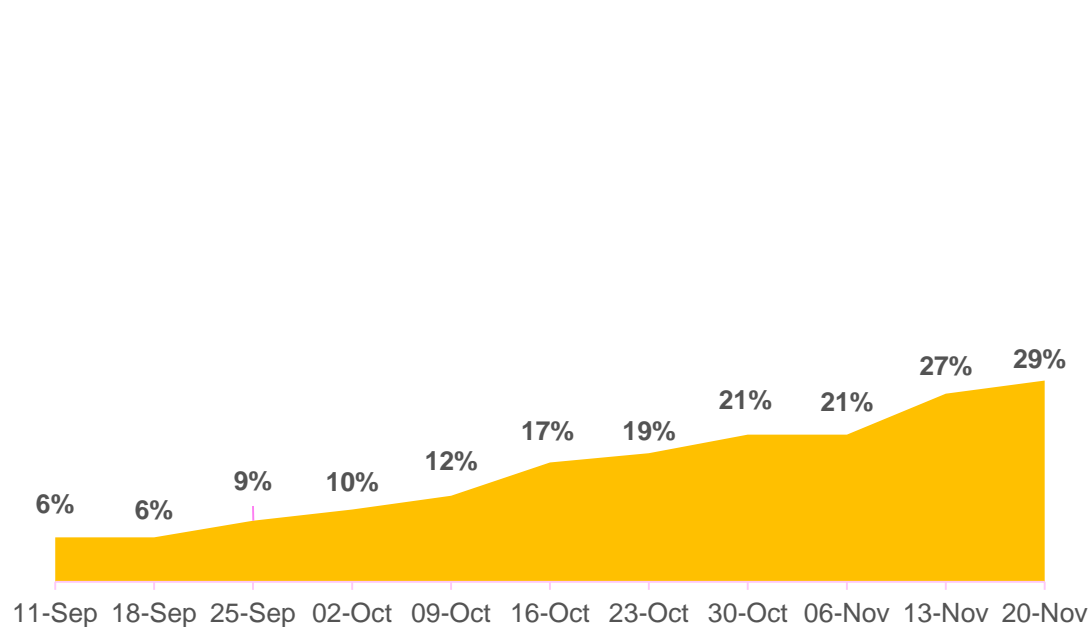


# 29% of people have purchased groceries for Christmas, 2ppts higher than last week

Long-life items such as snacks, confectionary and alcohol remain the most commonly purchased items so far this year

Have you bought any Groceries for Christmas yet?  
(e.g. food, drinks or snacks)  
Yes

You said you have bought Groceries for Christmas, which  
of the categories below best describe what you bought? \*

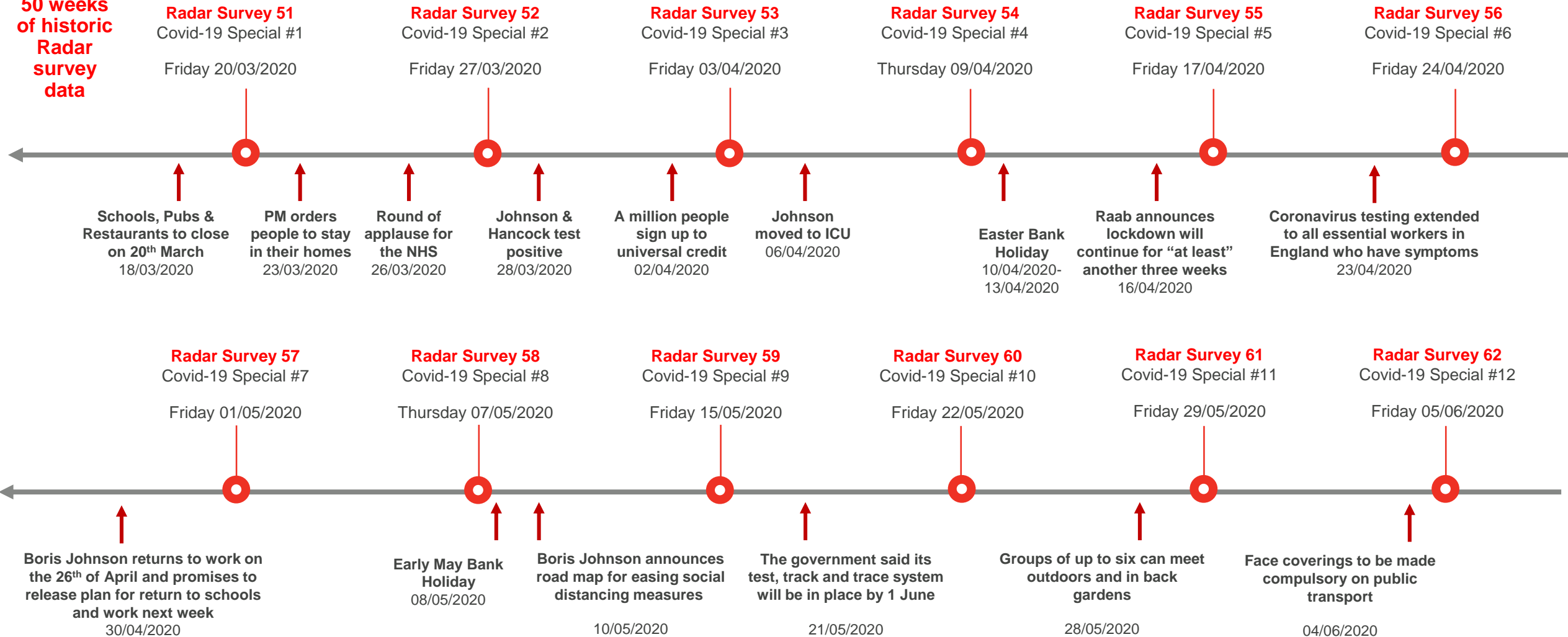


# Appendix



# 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

**Radar Survey 84**  
Covid-19 Special #34  
Friday 06/11/2020

**Radar Survey 85**  
Covid-19 Special #35  
Friday 13/11/2020

**Radar Survey 86**  
Covid-19 Special #36  
Friday 20/11/2020

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

National lockdown in  
England begins

05/11/2020

News of potential COVID-19  
vaccine by Pfizer available  
by Spring 2021

09/11/2020

England told to expect  
tougher Covid rules to allow  
for Christmas gatherings

18/11/2020