



The Mood of the Nation and Implications of COVID-19 in the UK

CORE 

 YOUTH

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METHODOLOGY

This report is based on a mix of data from the 4Youth Community of 16-24s and Core4 community of All 4 viewers.

Fieldwork took place early to mid June 2020

Who did we speak to?



988 Core4 community members
- *Sample 16+ adults*

79 Youth Community members – *sample of 16-24s*

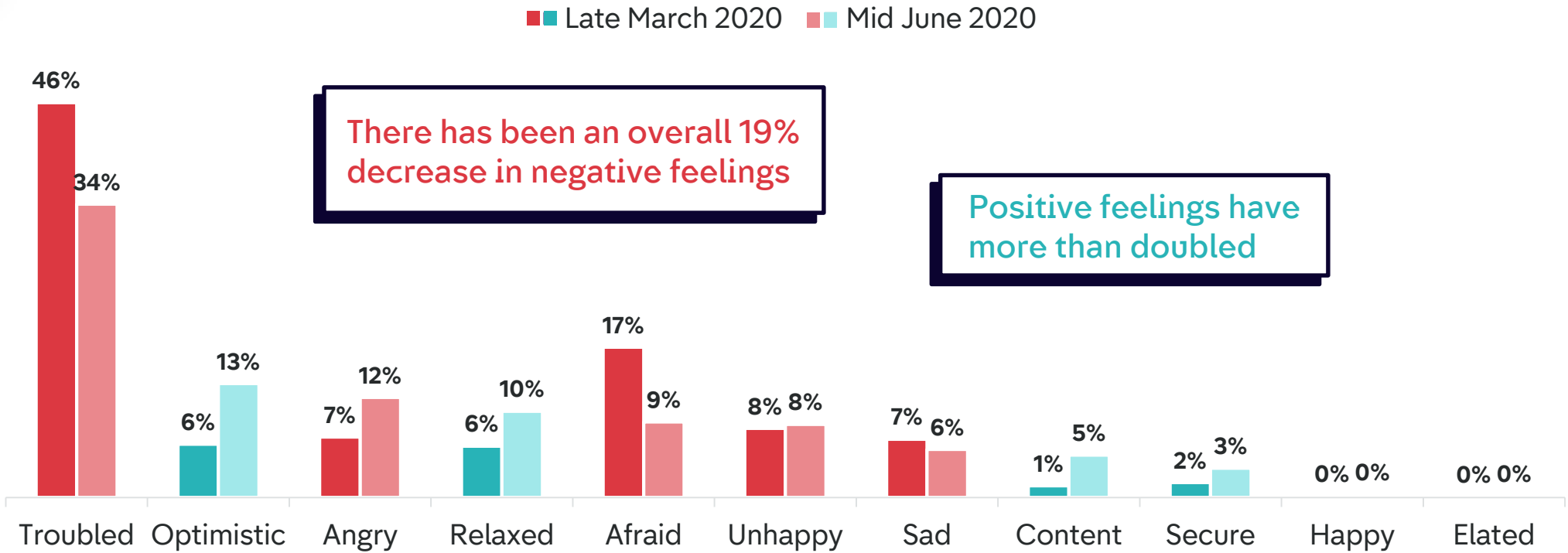


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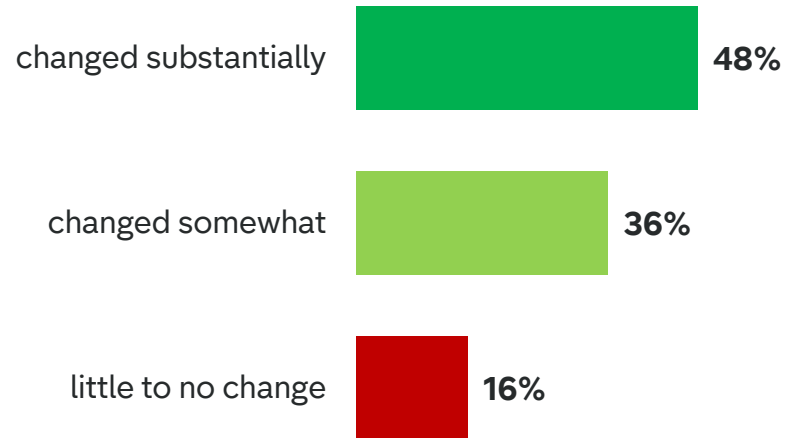
CONSUMER
OUTLOOK

People are feeling less negative overall, with positive sentiments like 'optimism' growing. Anger is the only negative statement to grow





The majority of people have had to change their behaviour as a result of the pandemic



84% [NET]

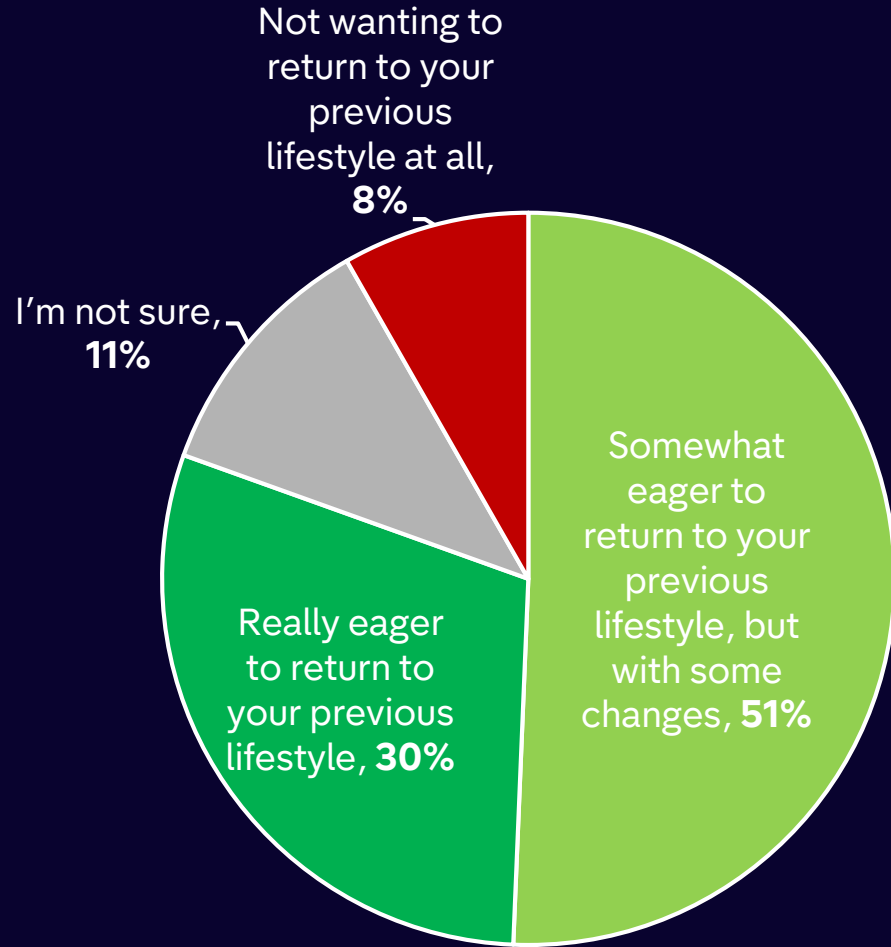
Q: ...and to what extent, if at all, have you changed your typical behaviour in response to the Coronavirus outbreak? Sample = 1066 Adults 16+

People are torn as to what they want from their post Covid-19 lifestyle

Only **30%** of people want to return to their previous lifestyle with no changes.

A further **51%** of people are keen to return to their previous lifestyle, but with some changes.

A minority **8%** are anxious to get back to 'normal' and **11%** are not sure.



Q Once the Coronavirus is no longer a threat to public health, to what extent do you want your lifestyle to return to how life was prior to the outbreak?
Sample = 1066 Adults 16+

People are torn on returning to their previous lifestyle

EAGER TO RETURN TO PREVIOUS LIFESTYLE

30%

The overwhelming sentiment from this group is a **desperation to be able to meet and touch friends and family**. They are also keen to get back to some of their favourite activities, going out for **meals**, to the **pub, theatre, cinema** etc.

"We want desperately to meet up with our **children & their families**. We want to share a **meal celebrate** all the **birthdays & anniversaries** that we would have done together. **I want to hold my children and grandchildren for a long time**. I want to talk to them face to face."

"I miss seeing **friends**, joining in regular **activities**, going to arts events, **travelling freely** and **confidently**."

RETURN TO LIFESTYLE BUT WITH SOME CHANGES

51%

The desired changes often centred around **quality time at home with family, slowing down** and **re-evaluating**, new **hobbies**, wanting more **flexible working arrangements** to stick. For others these changes are based on **fear of travelling** too far or **being in big crowds**.

"My **work life balance** was out of kilter so I am looking to reduce some my workload, and attempt to reincorporate **more activity** in my life."

"Going to stay at home more now and enjoy my **family** and home doing **DIY** myself has been great. **Playing board games with the kids**, spending **quality time** at home is the best thing to come out of lockdown"

"Still think until there's a vaccine need to be **cautious** and **stay safe** "

NOT WANTING TO RETURN TO PREVIOUS LIFESTYLE

8%

These people are either **really enjoying 'lockdown life'** and the slower pace or they are feeling **very anxious about having to change gear** back to 'normal'.

"I am loving **spending time at home** with my Husband and Dogs. Having spent the time working from home, my life has been **simpler, less stressed** and **easier**"

"I'm **nervous** about being around large groups of people - I had **social anxiety** before & not being exposed to them every day means it's spiked"

NOT SURE

11%

Too soon to know and still worried about the future

"Will it be truly safe? Will we learn from it or not? "

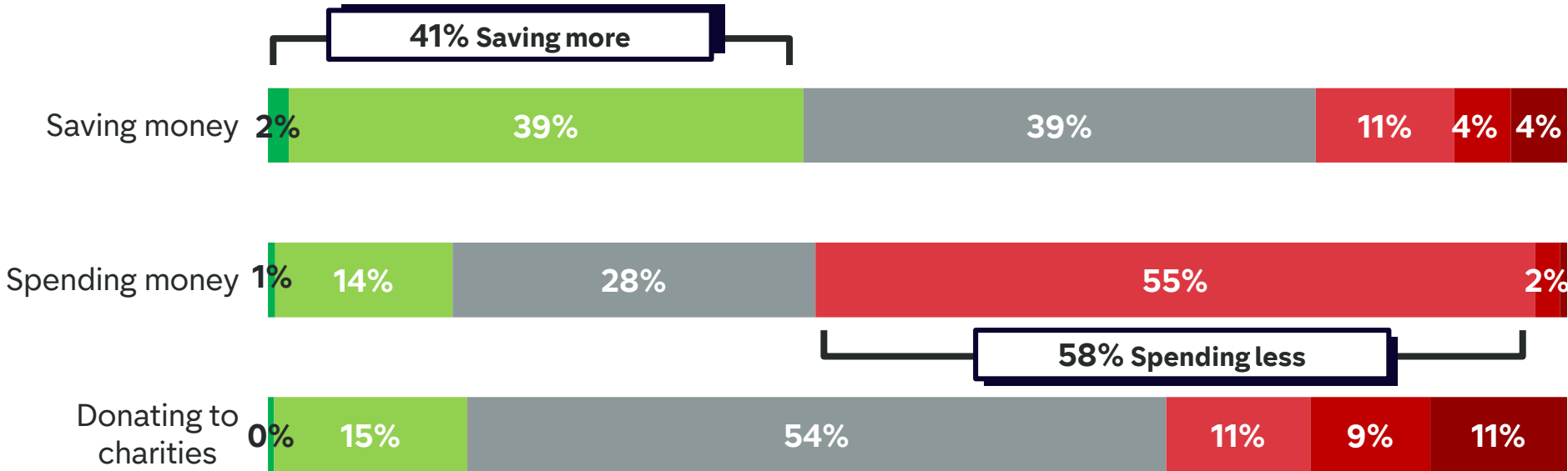
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**LOCKDOWN
CHANGES**

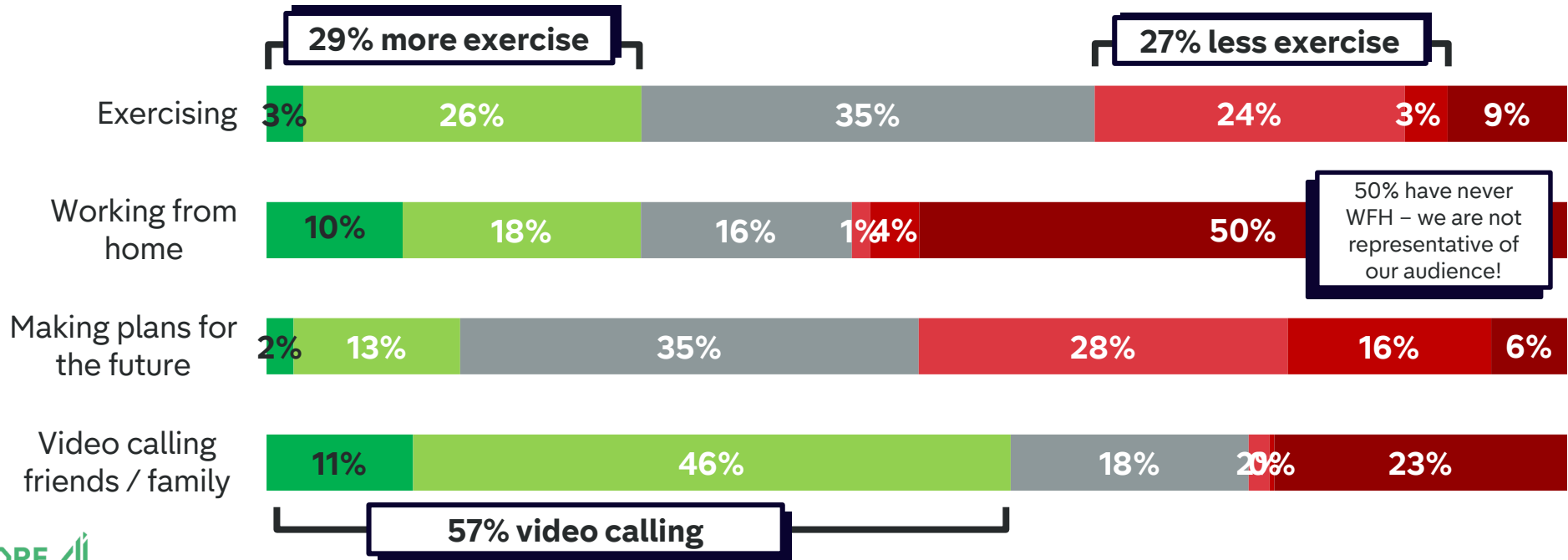
The majority have been saving more money & spending less, although for some the opposite is true

- Starting doing this
- Been doing more of this
- Been doing this the same amount
- Been doing less of this
- Stopped doing this
- Have never done this



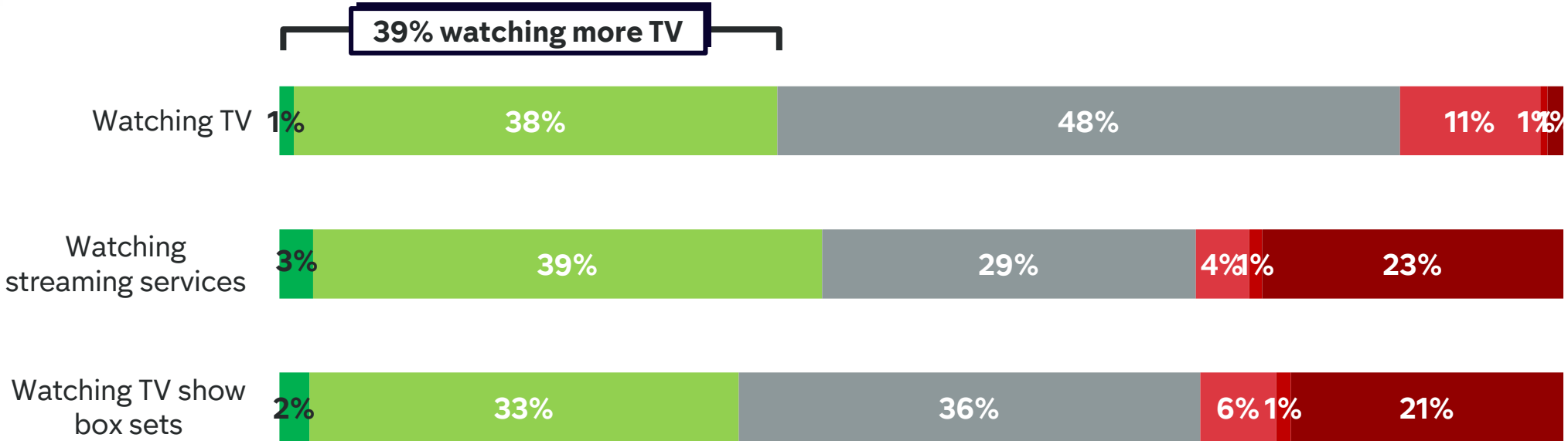
Video calling has been on the rise during lockdown, but people are split on exercise

- Starting doing this
- Been doing more of this
- Been doing this the same amount
- Been doing less of this
- Stopped doing this
- Have never done this



People have been watching more TV content across all platforms over the last few months

- Starting doing this
- Been doing more of this
- Been doing this the same amount
- Been doing less of this
- Stopped doing this
- Have never done this

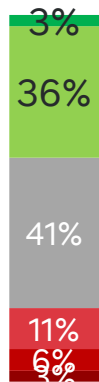


People have been doing more online shopping and trying to shop locally or support small businesses

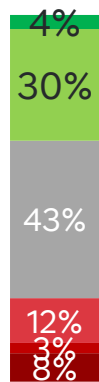
- Have never done this
- Stopped doing this
- Been doing less of this
- Been doing this the same amount
- Been doing more of this
- Starting doing this



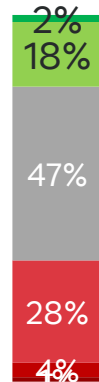
Online shopping



Shopping locally



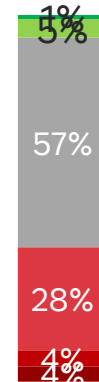
Supporting independent businesses



Grocery shopping



Trying out new retail brands



Buying toiletries / cosmetics

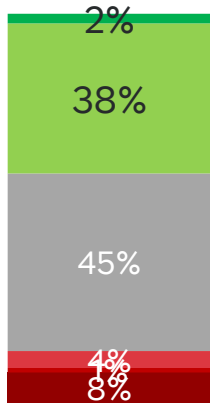


Buying clothes / footwear / accessories

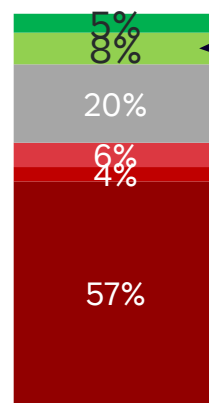
Baking has been a very popular activity with 40% doing this more than usual

- Have never done this
- Been doing less of this

- Stopped doing this
- Been doing this the same amount

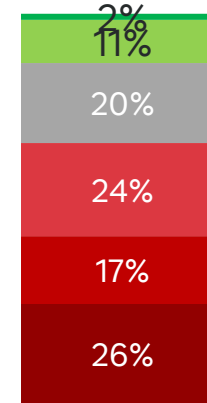


Cooking / baking



Starting online subscriptions (e.g. flower, food, drink deliveries)

13% have been investing more in online subscriptions



Ordering takeaway food

03

**LOOKING TO POST
LOCKDOWN LIFE**

Looking to the future, people are keen to support more independent businesses and their local stores

Asked of those who have been doing more of or started doing these activities during lockdown to offer insight into their post lockdown behaviour

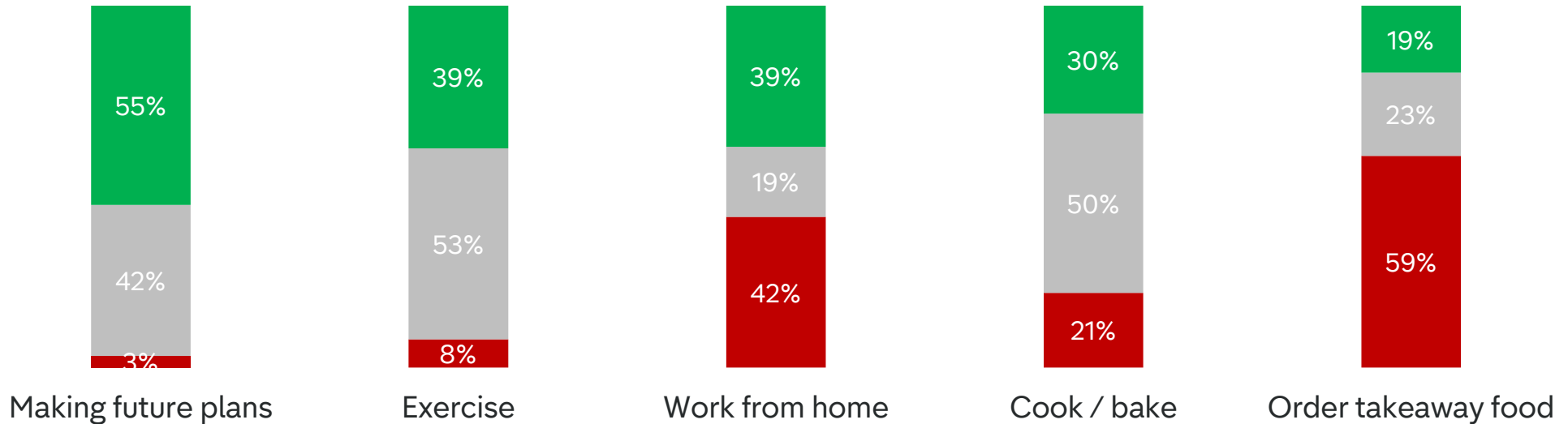
■ Do less ■ Do the same ■ Do more



People are looking forward to planning for the future and are keen to keep up exercise routines they have established

Asked of those who have been doing more of or started doing these activities during lockdown to offer insight into their post lockdown behaviour

■ Do less ■ Do the same ■ Do more



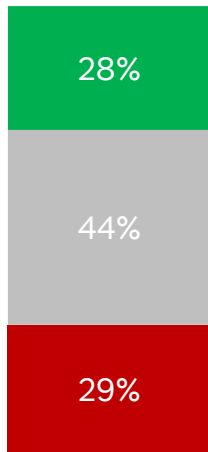
People who've worked from home in lockdown are split on whether they will be able to do it more or less in the future

Q: You've done more of / started doing the below activities. How do you see your current behaviour changing once the coronavirus restrictions have fully lifted?? Sample = 1066 Adults 16+

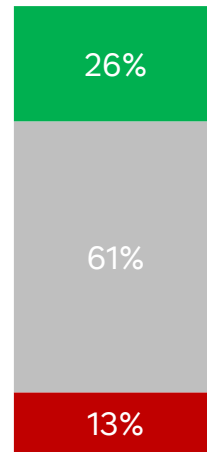
The financial outlook is very divided as people will emerge from lockdown in very different financial positions

Asked of those who have been doing more of or started doing these activities during lockdown to offer insight into their post lockdown behaviour

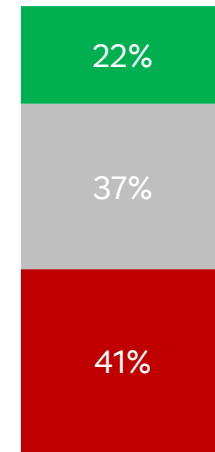
■ Do less ■ Do the same ■ Do more



Save money



Donate to charities

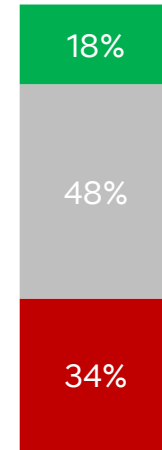
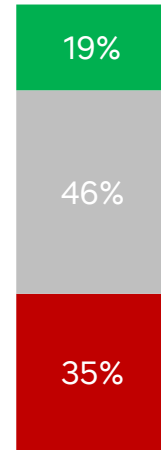
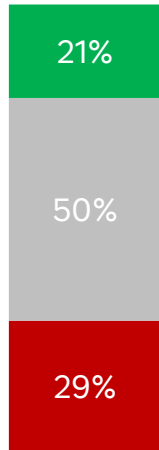
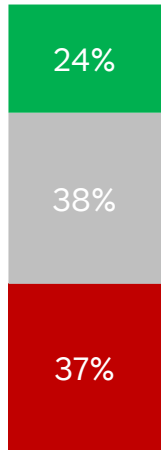


Spend money

Whilst some feel they will have less time to watch TV, around one fifth plan to watch more TV post lockdown

Asked of those who have been doing more of or started doing these activities during lockdown to offer insight into their post lockdown behaviour

■ Do less ■ Do the same ■ Do more



Video calling friends / family

Watch streaming services

Watch TV

Watch TV show box sets

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4

IMPACT ON LIFE
PLANS

Buying/moving house, career and investment decisions have been most impacted

Buy a house Move house Change job / career Make financial investment Start a business



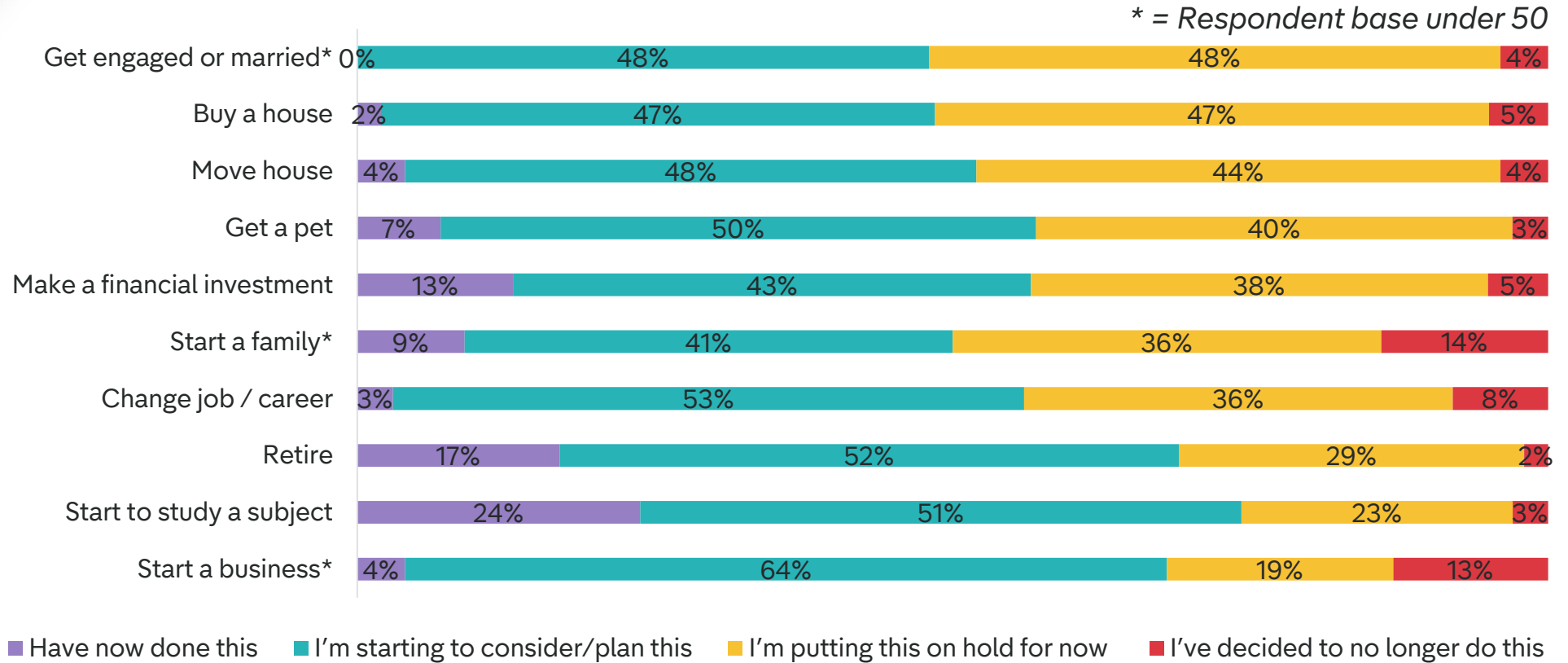
Total planned this	9%	11%	12%	17%	4%
% of total impacted	73%	71%	70%	58%	53%

While relationship, family and life stage decisions have been least impacted



	Studying a subject	Start a family	Get a pet	Get engaged / married	Retire
Total planned this	14%	2%	7%	3%	12%
% of total impacted	50%	43%	39%	38%	37%

Home purchases/moves, investment plans & weddings/engagements are most likely to be on hold

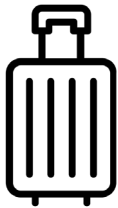


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**IMPACT ON
PURCHASING PLANS**

Holiday plans have unsurprisingly been most impacted by the pandemic

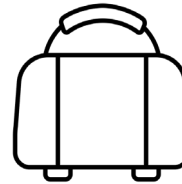
Book big holiday abroad



Book a city break



Book holiday in UK



Undergo major house renovations



Big household item purchase



Total planned this

40%

36%

41%

20%

19%

% of total impacted

89%

89%

88%

74%

67%

Least affected purchases include home based products, as well as more indulgent products

Buy a car



Buy luxury item



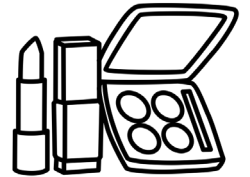
Buy new clothes



Make a big technology purchase



Buy new toiletries / cosmetics



Total planned this

14%

8%

33%

19%

32%

% of total impacted

65%

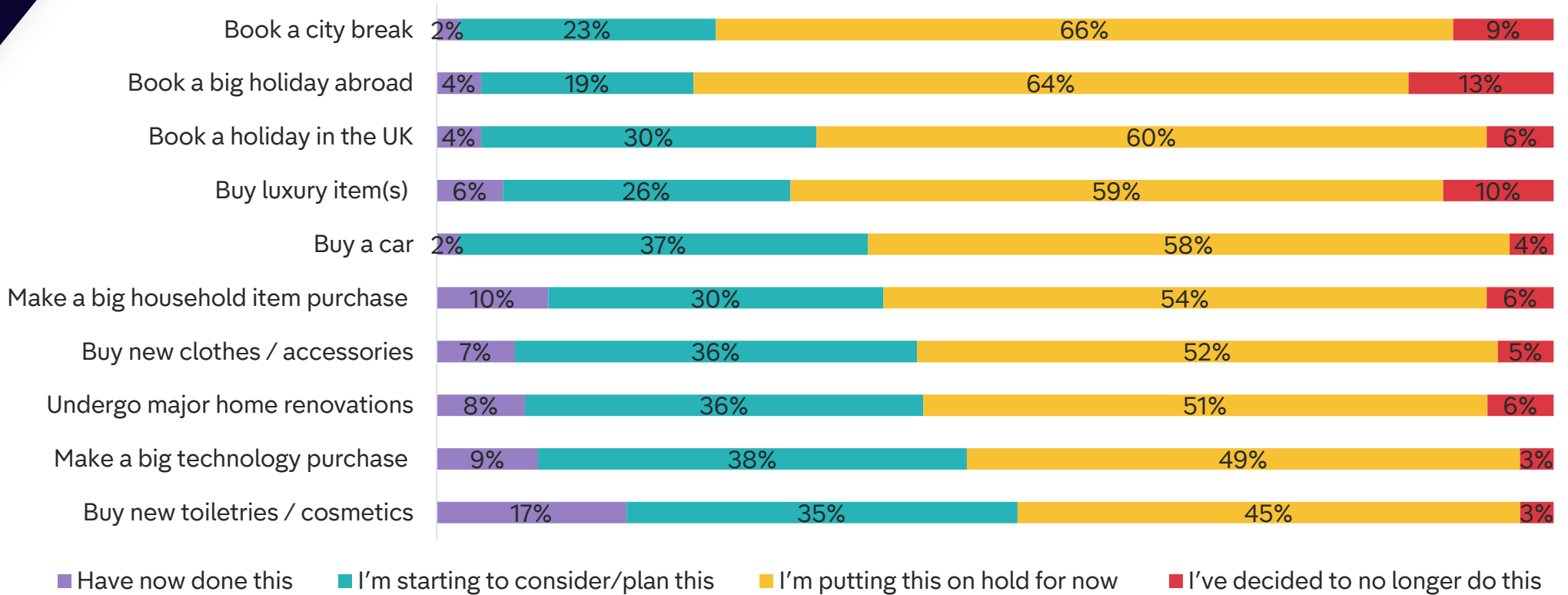
58%

57%

43%

35%

Holiday plans are most likely to be put on hold, along with some big ticket purchases



40% were planning a big holiday abroad

Over a third have had plans impacted and a further 5% hadn't been considering an abroad holiday and now are doing. Of these two groups, over 6 in 10 have put plans on hold, under 20% are planning a trip(s), while 13% have decided to no longer do so.

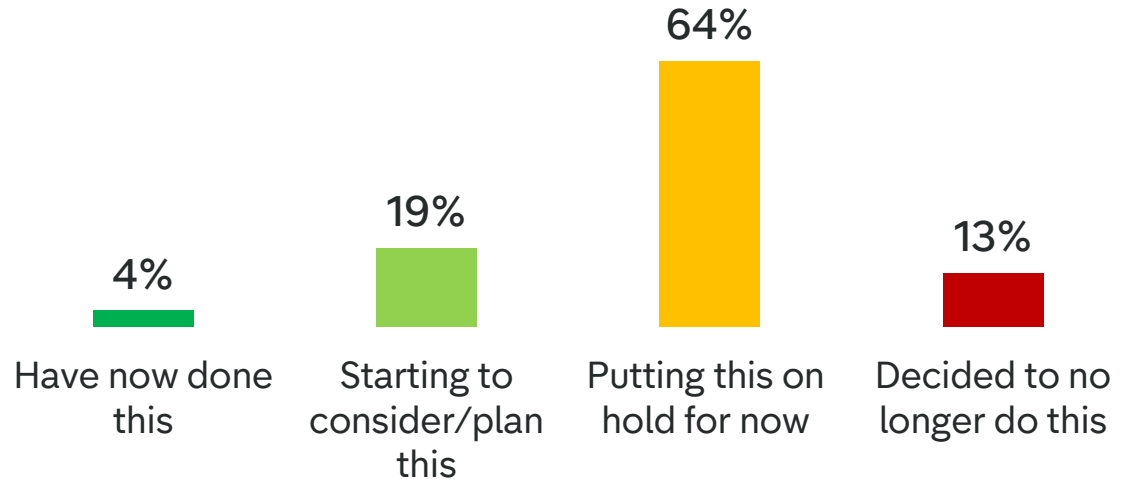


Was planning & not impacted 4%

Was planning & has been impacted 36%

Wasn't planning but now I am 5%

What stage are these consumers now at?



36% were planning a city break

Almost a third have had plans impacted and a further 9% weren't considering a city break but now are. Over 6 in 10 are putting their city break plans on hold while almost a quarter are planning this now.

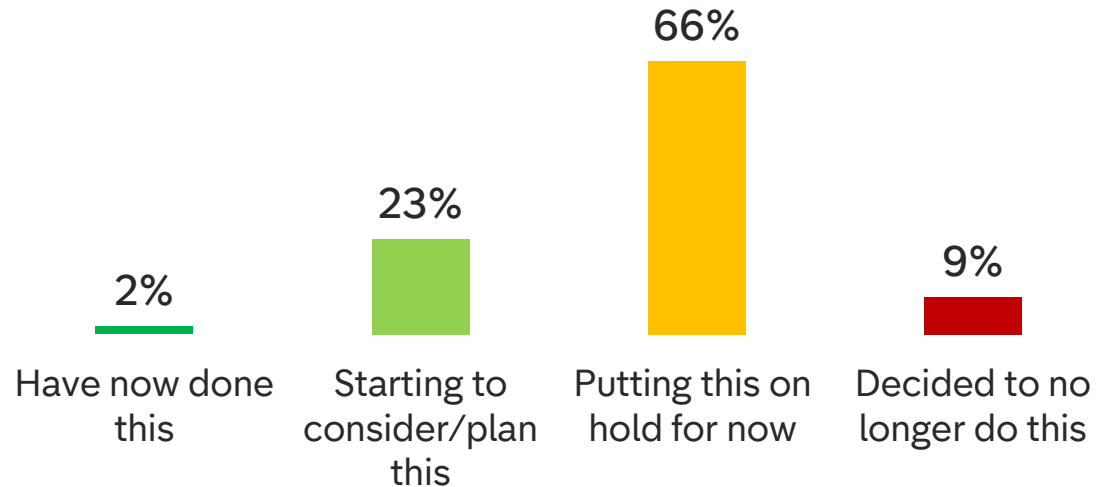


Was planning & not impacted 4%

Was planning & has been impacted 32%

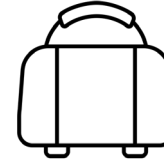
Wasn't planning but now I am 9%

What stage are these consumers now at?



41% planned to holiday within the UK

Over a third have had plans impacted and a further 14% hadn't been considering a UK holiday and now are doing since the pandemic. Of these two groups, 6 in 10 have put plans on hold, while almost a third are starting to plan their UK trip.

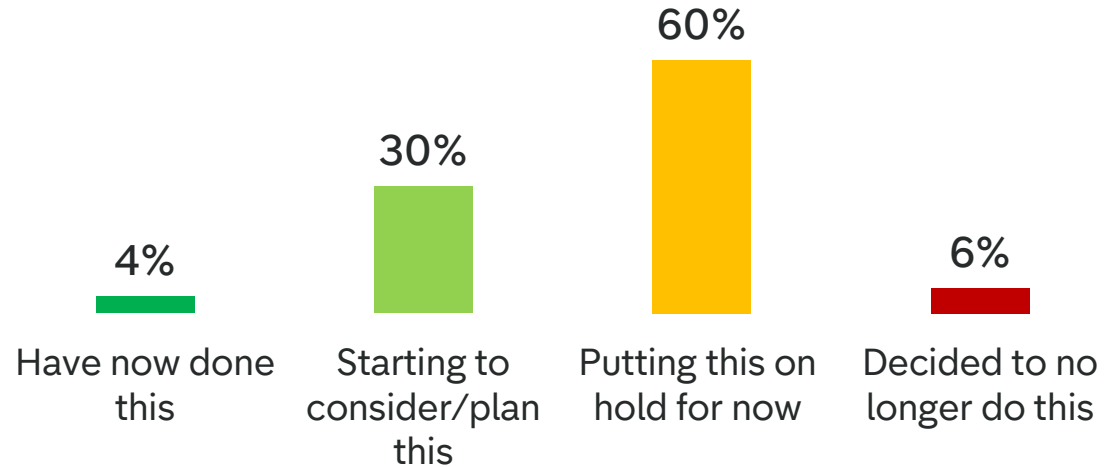


Was planning & not impacted 5%

Was planning & has been impacted 36%

Wasn't planning but now I am 14%

What stage are these consumers now at?



20% were planning house renovations

15% have had plans impacted and a further 6% hadn't been considering house renovations but now are. Of these two groups, over a third are now planning this and 8% have done this. Half are putting plans on ice for now and 6% have decided against it.

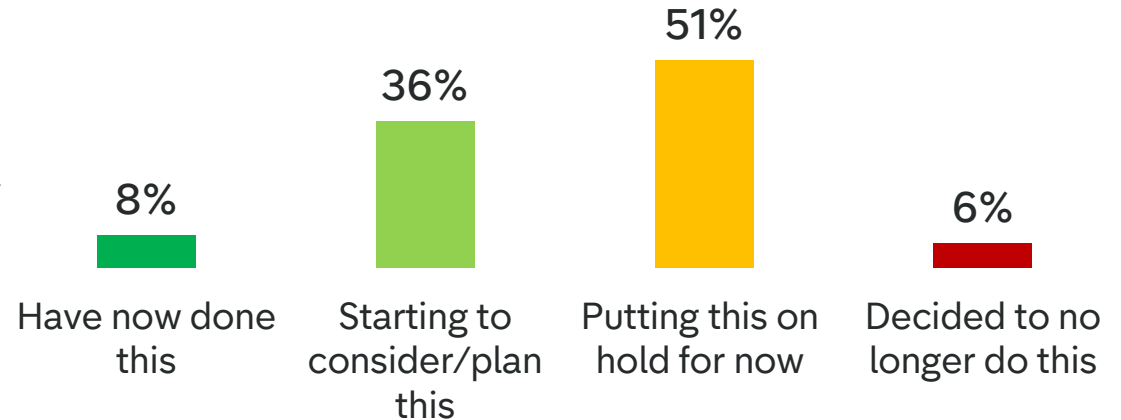


Was planning & not impacted 5%

Was planning & has been impacted 15%

Wasn't planning but now I am 6%

What stage are these consumers now at?



19% planned a big household item purchase

13% have had their plans impacted as a result of the pandemic, which a further 8% started planning for a big household purchase as a result of the pandemic. 3 in 10 are now moving ahead with their plans and 1 in 10 have already made purchases during the pandemic. However over half have put plans on ice and 6% are no longer considering this type of purchase.

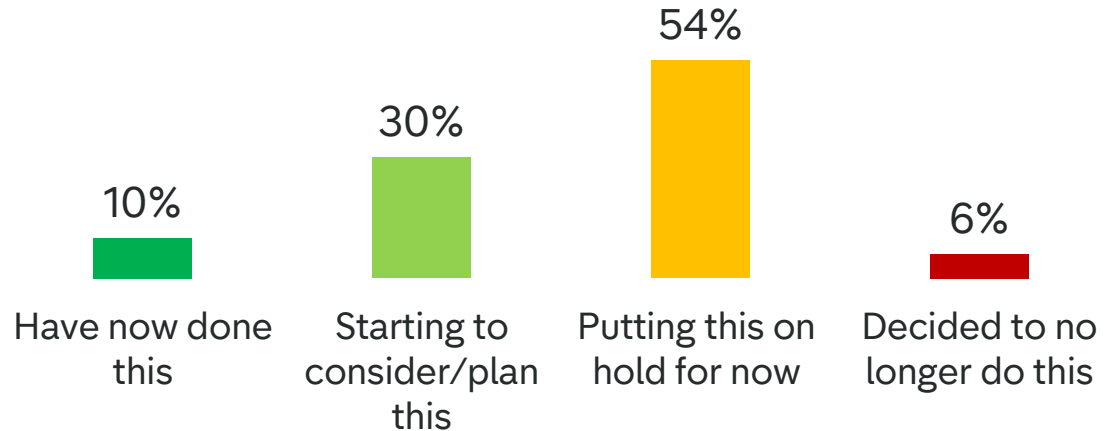


Was planning & not impacted 6%

What stage are these consumers now at?

Was planning & has been impacted 13%

Wasn't planning but now I am 6%



14% were planning on purchasing a car

9% have had their plans to buy a car impacted by the pandemic and a further 3% didn't have this on their radar but now are planning this. Of these two groups a over third are now considering or planning this now, while almost 6 in 10 people put their plans on hold. 4% have decided to no longer buy a car.

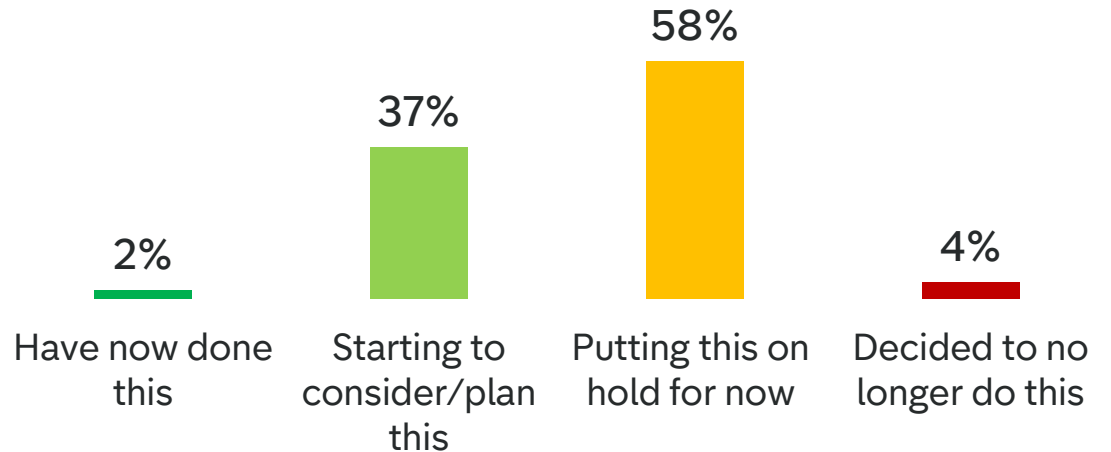


Was planning & not impacted 5%

Was planning & has been impacted 9%

Wasn't planning but now I am 3%

What stage are these consumers now at?



8% had planned to buy luxury goods

Only 5% have had their plans impacted and more than as many weren't considering buying luxury goods and now are. Of these two groups, over a quarter are planning to make a purchase and 6% have done so. However almost 6 in 10 are holding off and 1 in 10 are no longer planning to.

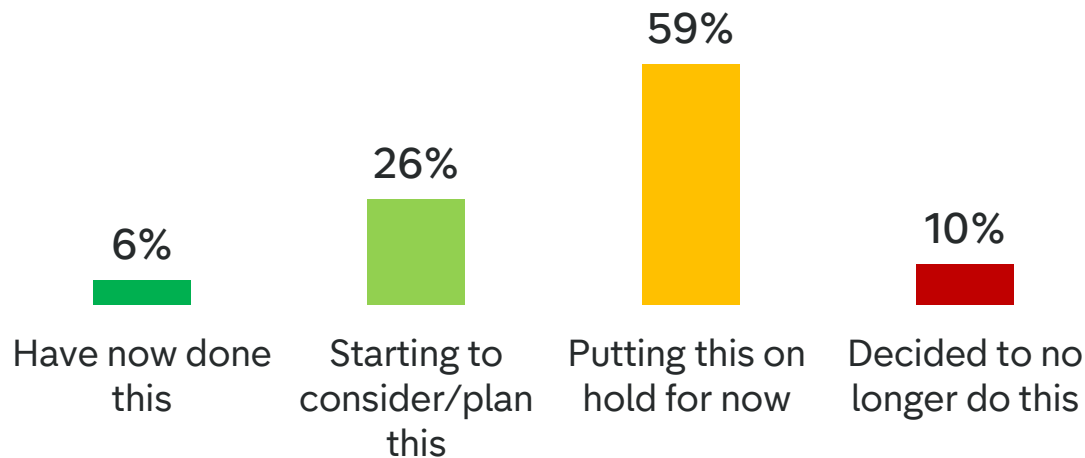


Was planning & not impacted 3%

Was planning & has been impacted 5%

Wasn't planning but now I am 2%

What stage are these consumers now at?



33% intended to buy clothes & accessories

Almost 1 in 5 had plans impacted and a further 11% hadn't considered buying clothes and accessories but now have done. Of these two groups, just over half have put plans on hold, over a third are planning to make a purchase and 7% have done so.

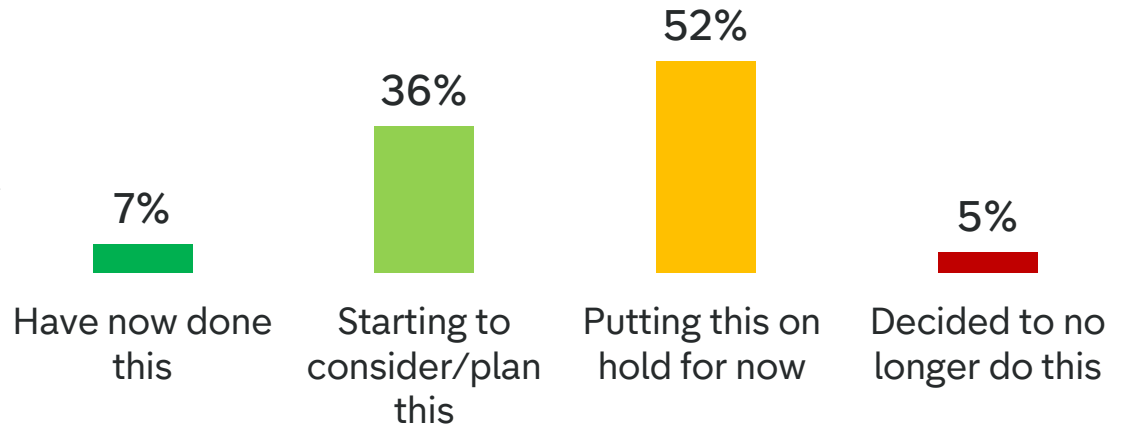


Was planning & not impacted 14%

Was planning & has been impacted 19%

Wasn't planning but now I am 11%

What stage are these consumers now at?



19% intended to make a big tech purchase

8% of these have had their plans impacted and a further 8% weren't considering any big technology purchases but now are. Of these two groups, almost half are holding off on their plans, while almost 4 in 10 are moving on with their plans. Almost 1 in 10 have gone on to make a big tech purchase since the pandemic.

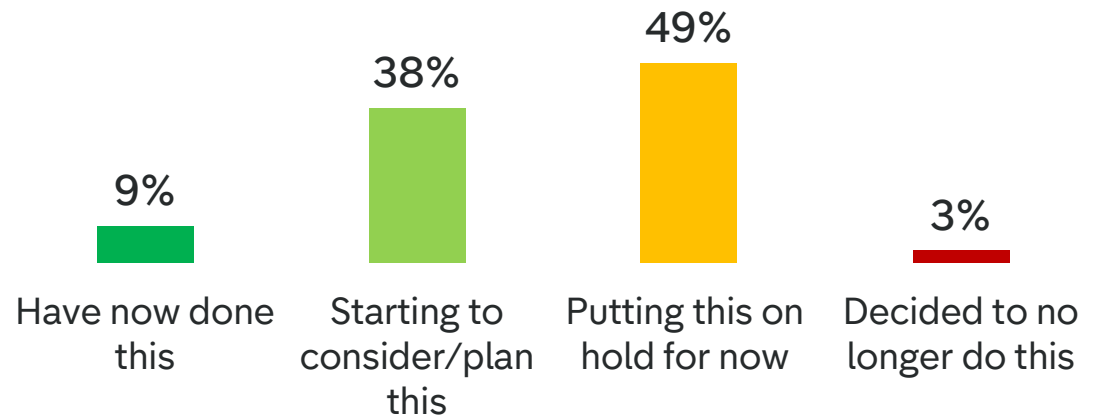


Was planning & not impacted 11%

Was planning & has been impacted 8%

Wasn't planning but now I am 8%

What stage are these consumers now at?



1 in 3 planned to buy toiletries & cosmetics

11% have had plans impacted as a result of the pandemic and further 6% decided to make purchases since pandemic. Of those two groups, almost a fifth have gone onto make buy products and over a third intend to.

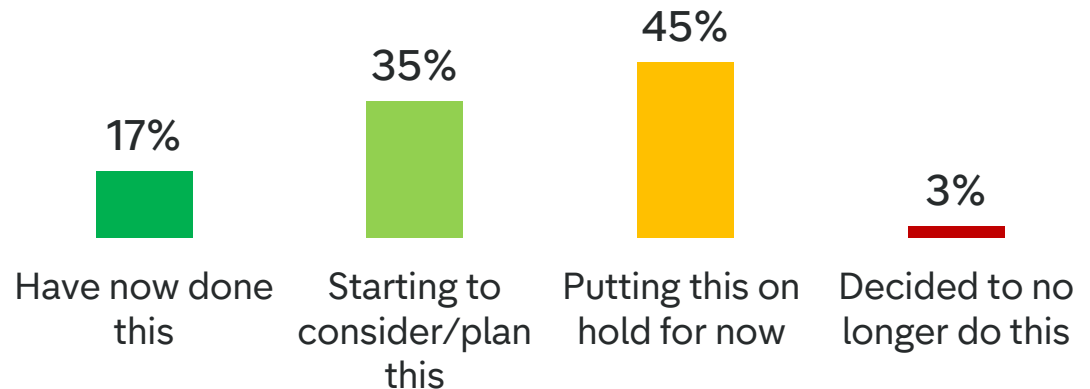


Was planning & not impacted 21%

What stage are these consumers now at?

Was planning & has been impacted 11%

Wasn't planning but now I am 6%



06

THINKING AHEAD

Main conditions before consumers feel comfortable making decisions

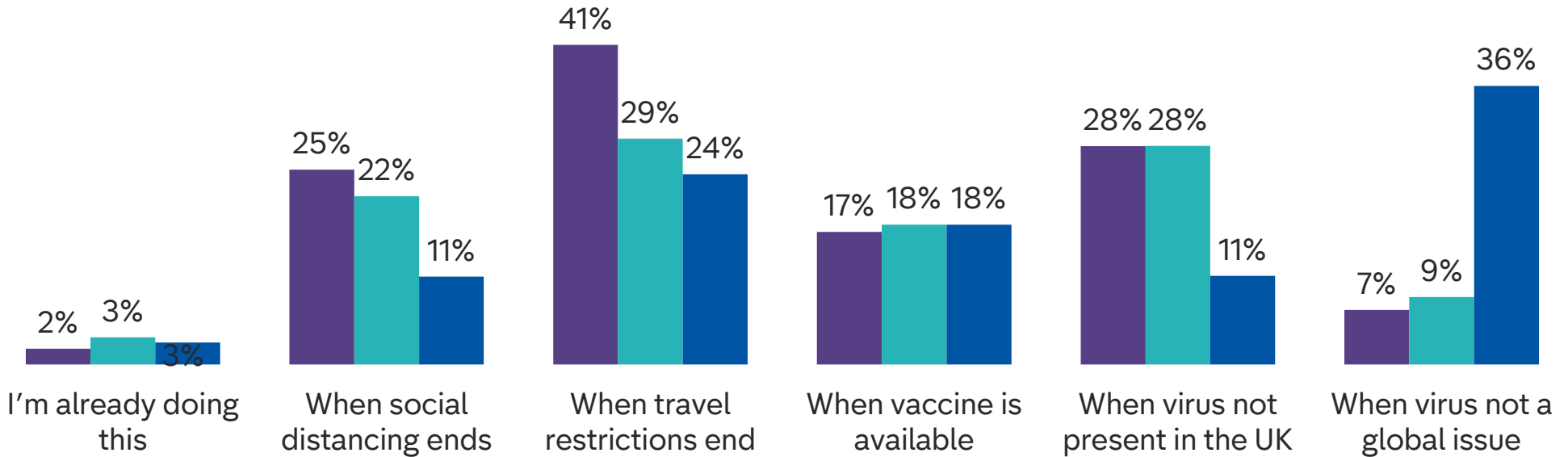
Holidays and travel

Booking holiday in UK	Booking holiday Abroad	Making trips to other areas of UK	Making longer car journeys	Using public transport	Returning back to place of work
When travel restrictions end 29%	When virus not a global issue 36%	When travel restrictions end 41%	When travel restrictions end 43%	When virus not a global issue 24%	When social distancing ends 16%
When virus not present in UK 28%	When travel restrictions end 24%	When virus not present in UK 28%	When social distancing ends 18%	When social distancing ends 23%	I'm already doing this 14%

For domestic trips travel restrictions being lifted is a key driver, along with social distancing

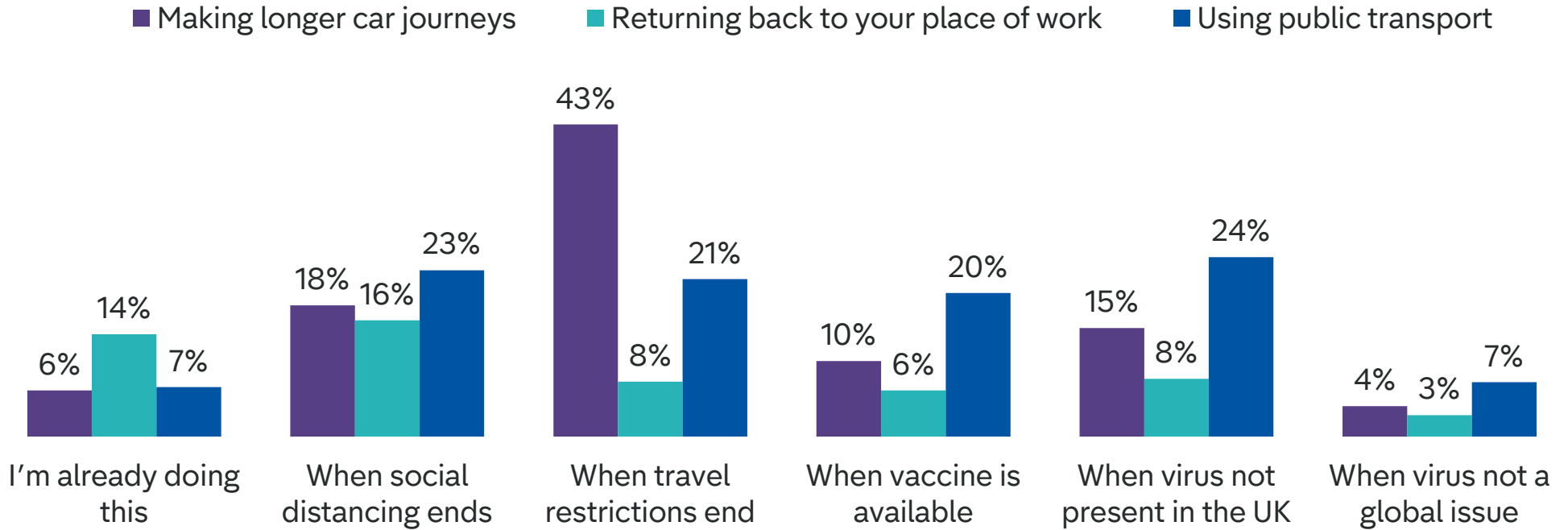
While for international trips the virus needs to be less of a threat

■ Making trips to other areas of the UK ■ Booking a holiday in the UK ■ Booking a holiday abroad



Lifting social distancing and travel restrictions will ease concerns around longer car journeys

But for public transport more control of virus is required



Main conditions before consumers feel comfortable making decisions

Socialising and Entertainment

Eating out at a restaurant or cafe

Going to a bar, pub or club

Going to the cinema / theatre

Visiting museums and galleries

Going to the gym or leisure centre

When social distancing ends
41%

When social distancing ends
40%

When social distancing ends
35%

When social distancing ends
31%

When social distancing ends
19%

When virus not present in UK
31%

When virus not present in UK
28%

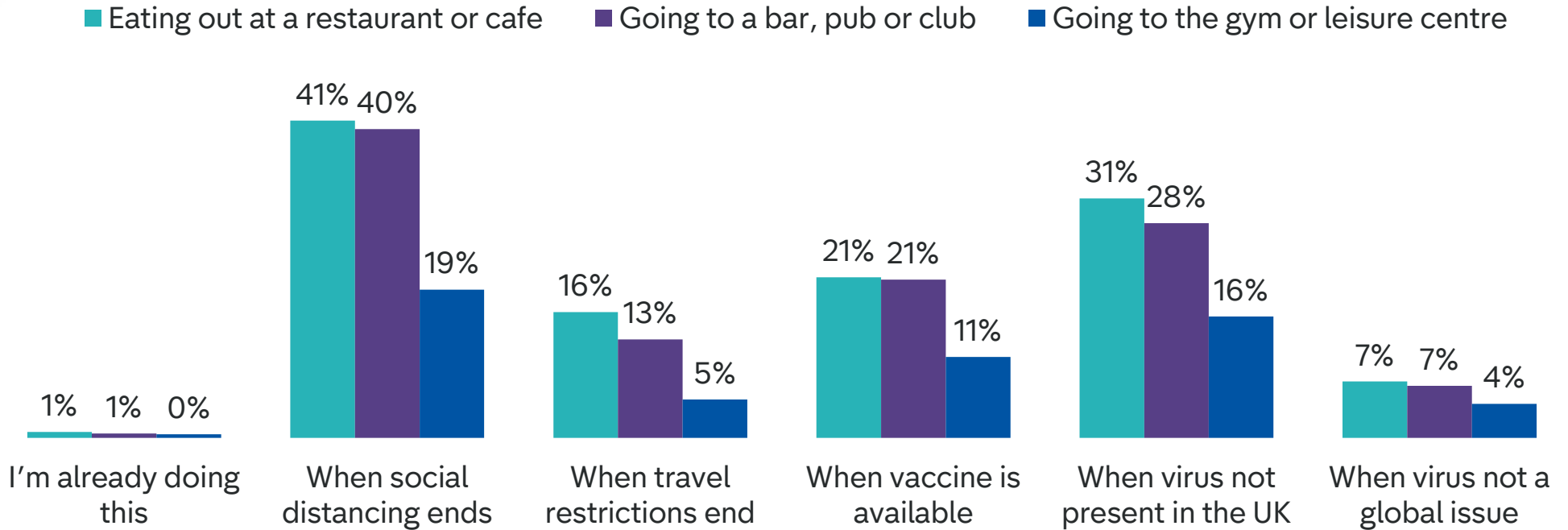
When virus not present in UK
31%

When virus not present in UK
25%

When virus not present in UK
16%

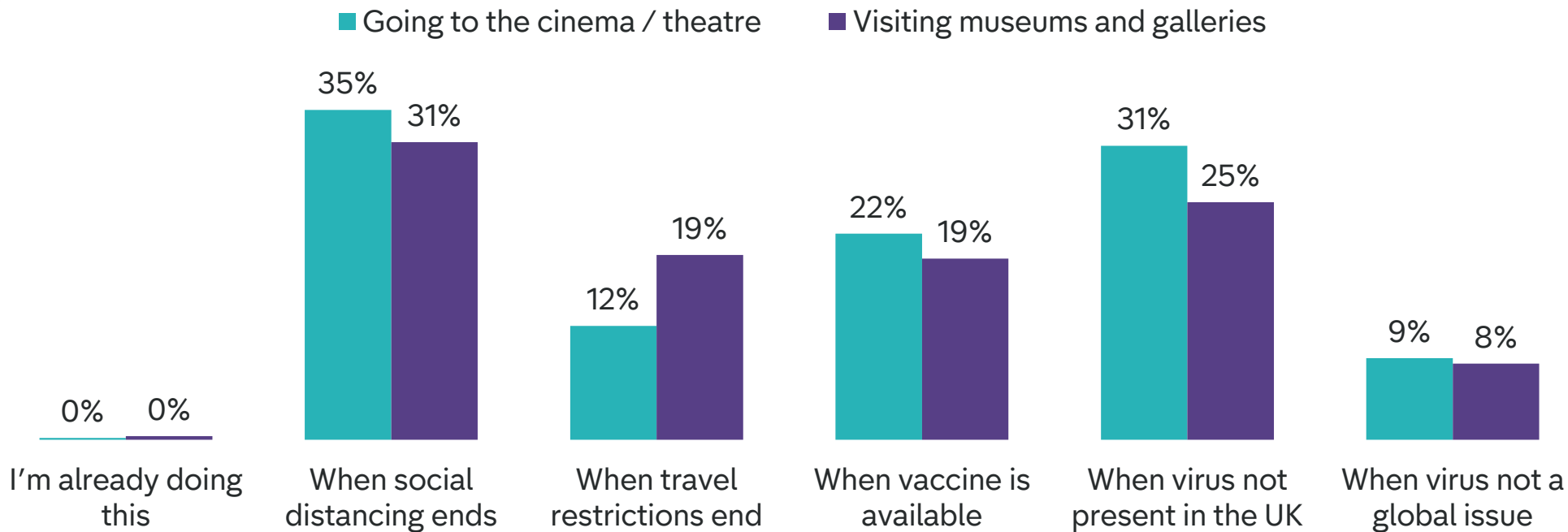
Majority are happy to visit social spaces once social distancing guidelines are lifted

However many want reassurance that the virus is less present in UK



Social distancing will provide reassurance to visit entertainment and cultural spaces

However many feel greater control of virus is needed in UK for this



Main conditions before consumers feel comfortable making decisions

Events and Retail

Attending a big outdoor event

Attending a big indoor event

Going to shopping centres

Visit large retail stores

Visiting car showrooms

When virus not present in UK

27%

When virus not present in UK

27%

When social distancing ends

34%

When social distancing ends

29%

When social distancing ends

10%

When social distancing ends

26%

When social distancing ends

24%

When virus not present in UK

26%

When virus not present in UK

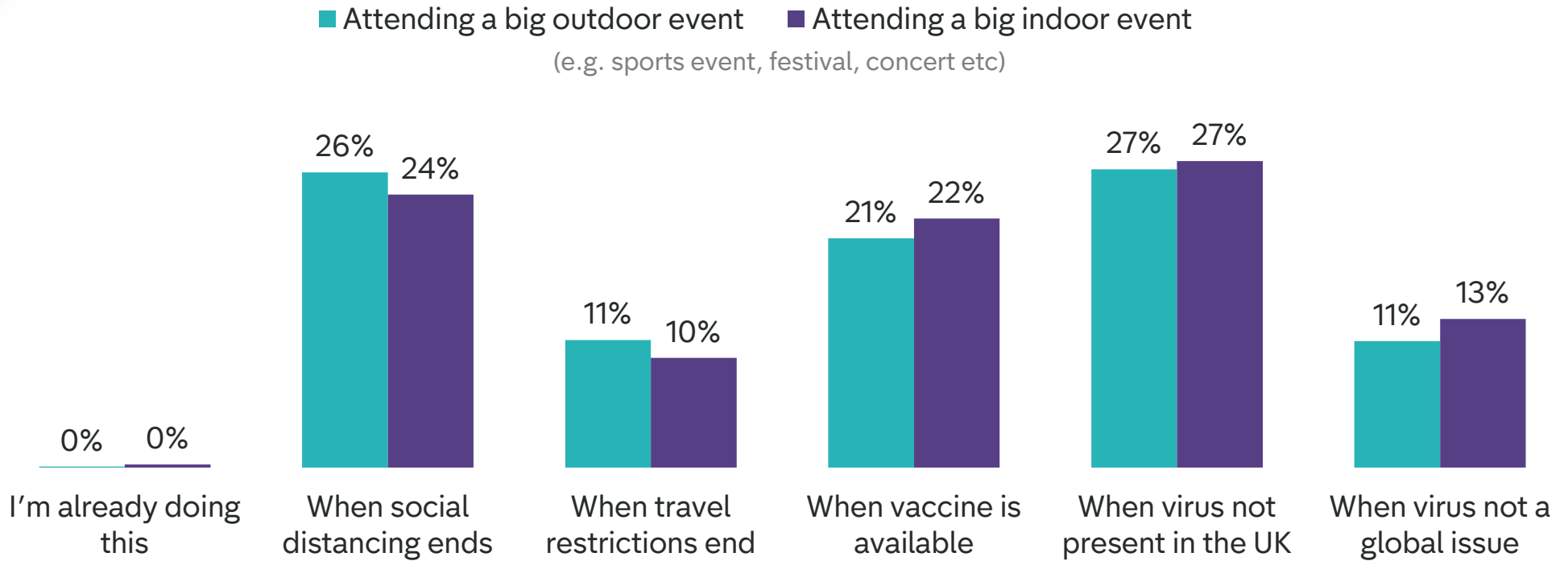
20%

When virus not present in UK

10%

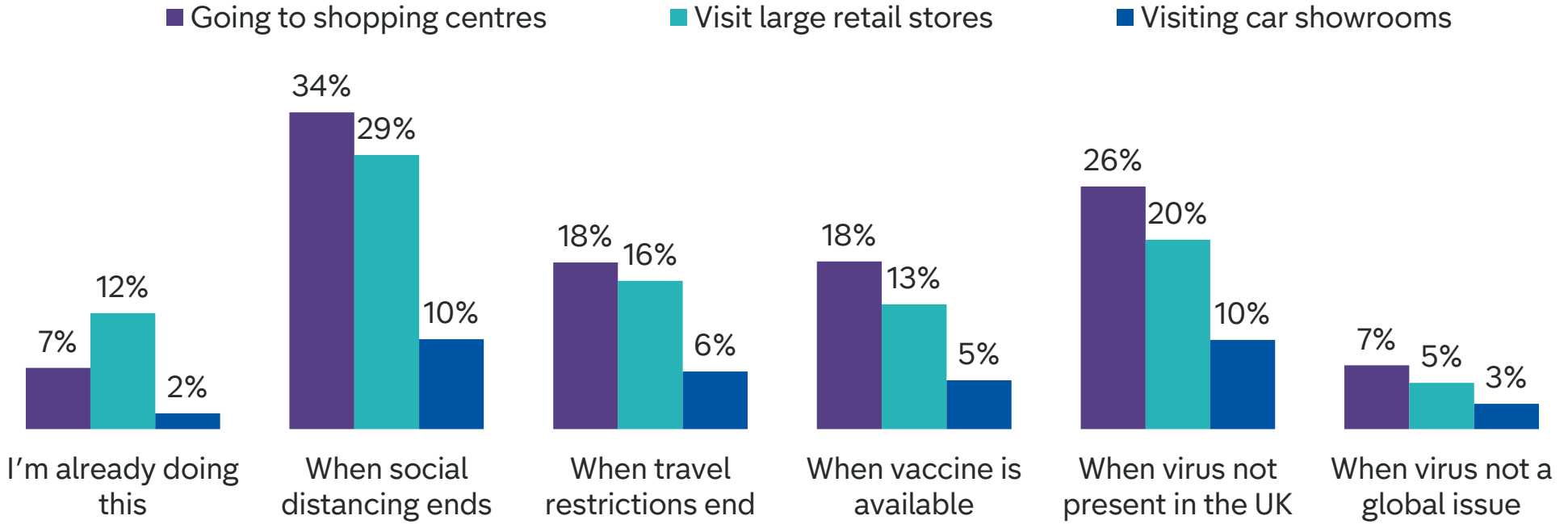
A good proportion are happy to attend large indoor/outdoor events once social distancing lifts

However the majority will hold off until virus is a lesser threat



The majority are happy to go into shops when social distancing ends

However a good proportion won't until virus is less of a threat





Any questions?

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