

Intro to the study

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Introduction to the Appinio Coronavirus Consumer Report

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Last year, in March 2020, COVID-19 became a worldwide problem. The UK began its first lockdown, something that had never happened before.

Different economic sectors were suddenly paralysed and no one across the world was able to predict how our daily lives or economy would change.

It was precisely at this point that Appinio decided to set up a comprehensive follow-up study to better understand the impact of the pandemic on the daily life and consumption behavior of the German population. This report was then implemented in the UK in mid 2020.

Over the past year, this report has helped thousands of companies in Germany and the UK to better understand consumers and their behaviours during this global pandemic.

Our new report not only features a new design, but also a new questionnaire - better adapted to current concerns, with topics such as vaccinations. We will also publish 'additional questions' in each report on more current or debated topics.

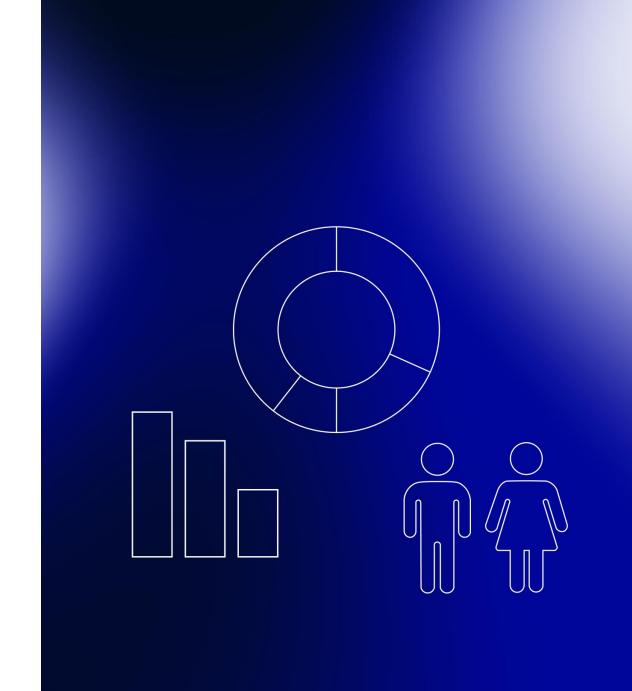
All data and other filtering options (e.g., age or gender) can be viewed in real time on our research platform: research.appinio.com. This report is also available in other European countries, namely France and Spain, but not Germany.

Appinio's analysis supports companies in all sectors. In these turbulent times, it is important to understand how market research helps each of us better understand the world we live in

Thank you for your continued support.

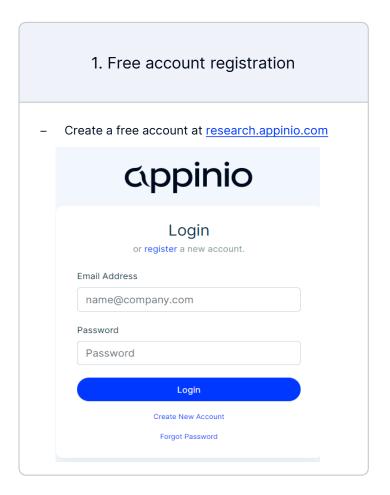
Yours, Jonathan Kurfess

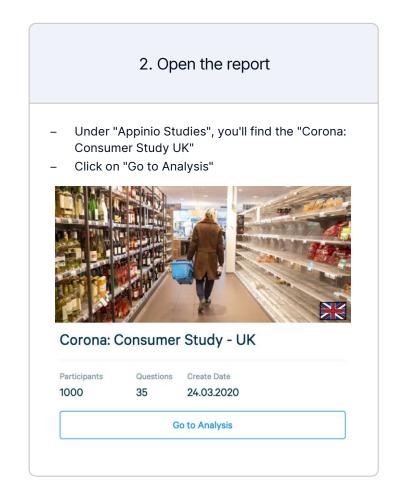
01 Study design & sample

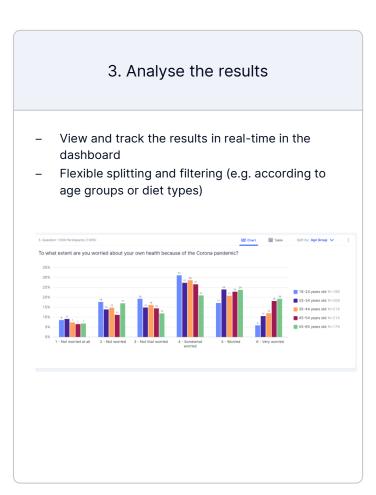


Access to the studies and the tracking-data

Real-time access to the studies and all the answers on the Appinio analyser dashboard







Tracking: Study design

Data collection, sample and content

Method

- Mobile questionnaire, played out via the Appinio app
- The survey took place between September 29 and September 30, 2021
- Data can be accessed, filtered and downloaded at research.appinio.com

Sample

- Country: United Kingdom
- Age: 16 65 years old
- Representative at national level regarding age and gender
- Survey 1 to 24: N=1000

Content

- Current additional questions:

Christmas countdown: The days are getting shorter and the temperatures colder; are Brits already preparing for Advent?

- Who has thought about Advent calendars this year, seen advertisements and who has even bought one?
- How much money are Brits willing to spend on an advent calendar?
- How important are advent calendars for Brits?
 And what kind of calendar is the favorite?

02 Key Insights



Key Insights – Additional Questions

The most interesting insights of the week at a glance



41% of Brits over 16 (still) have an Advent calendar.

- Nearly two thirds of Brits (63%) had an Advent calendar as a child. Also today, 41 percent of adults continue to use one.
- When asked about their favourite Advent calendar, 26 percent answered with chocolate. The brands most frequently named are Cadbury (21%), Lindt (2%), Maltesers (2%) and Lego (2%).
- In general, it is a little more important for the younger generations (16-34 year olds) to have an advent calendar than it is for the older generations.
- Across all age groups, 47 percent of Brits say that owning an Advent calendar is (somewhat) important to them. In a European comparison Germany, France and Spain consider it more important, at a share of at least 58%.



Around every third person at least has an idea of which Advent calendar to buy this year.

- While 8 percent of those surveyed state that they have already bought or tinkered with an Advent calendar, around 21% has an idea of which Advent calendar they will buy / tinker for themselves or for someone else this year.
- Gen Zs (16-24 year olds) are particularly determined to do this. Almost a third of them (27%) already know which Advent calendar it will be this year.
- Half (51%) of those surveyed who have bought or are planning to buy an Advent calendar are doing it for their children. 42 percent are purchasing on for themselves and another 36 percent for their partners.





DIY calendars are especially popular with Generation Z & Y.

- While the chocolate calendar is the most popular Advent calendar among Brits of all ages this year (76%), self-made and food/drink calendars are particularly popular among the younger generation. 10 and 14 percent of 16-24 and 25-34 year olds, respectively, prefer making their own calendar this year.
- **Fifteen percent** of those are planning to buy / create an Advent calendar this year are willing to spend more than £20 on it, with only 4% willing to spend more than £50. Surprising: the 25 to 34 year-olds are most likely to be willing to spend more than £20 on an Advent calendar (19%).
- Over 1 in 10 Brits (12%) has already taken part in an online advent calendar. They seem particularly popular with 16-24 year olds with a participation rate of 18%.

03 Additional Questions

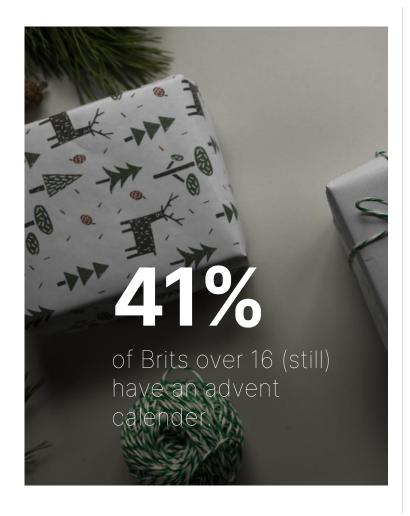
Christmas countdown: The days are getting shorter and the temperatures colder, are Brits already preparing for Advent?

- Who has thought about advent calendars this year, seen advertisements and perhaps even bought one?
- How much money are Brits willing to spend on an advent calendar?
- How important are advent calendars for Brits? And what kind of calendar is their favourite?

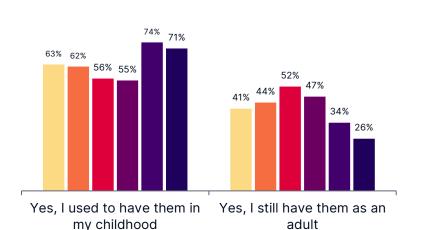


Advent, Advent

Advent calendars - who owns them and what kind of calendar is best received?



Have you ever had an advent calendar?



■ Total ■ 16-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55-65

Which advent calendars are the favourites?





- Nearly two thirds of Brits (63%) had an advent calendar as a child. However, a less significant proportion (41%) have an advent calendar in adulthood.
- When asked about their favourite advent calendars, 26% answered with chocolate, followed by Cadbury calendars. The brands most frequently named are **Cadbury (21%), Lindt (2%), Maltesers (2%) and Lego (2%).**

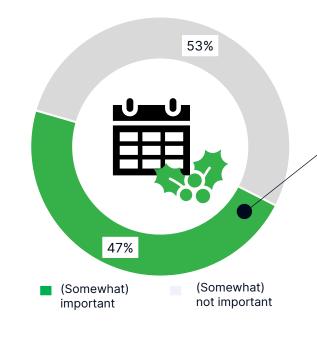
Advent, Advent

How important are advent calendars in the UK and in comparison, to other countries?

How important is it to you to have your own Advent calendar during advent?

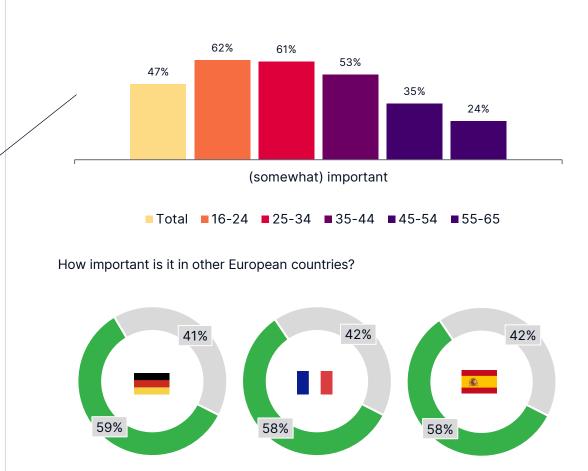
47%

of Brits consider it important to have their own Advent calendar during Advent.





- In general, it is a little more important for the **younger generations (16-34 year olds)** to have an advent calendar than it is for the older generations.
- Across all age groups, 47% of Brits say that owning an Advent calendar is (somewhat) important to them. In a European comparison Germany, France and Spain consider it more important, at a share of at least 58%.



(Somewhat)

important

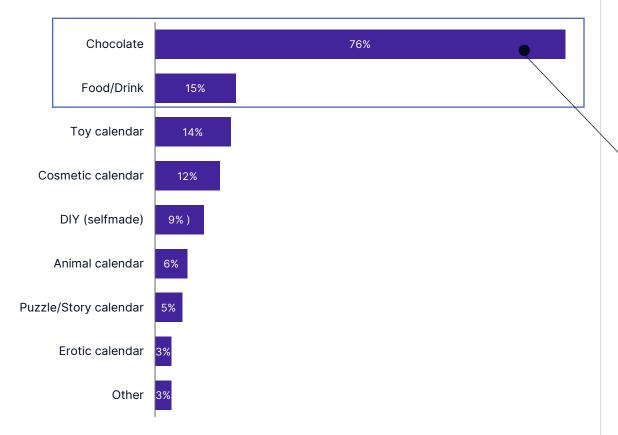
(Somewhat) not

important

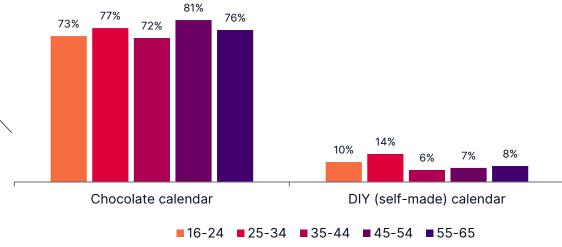
Who is buying which calendar?

The most popular Advent calendars

Most popular calendars for the year





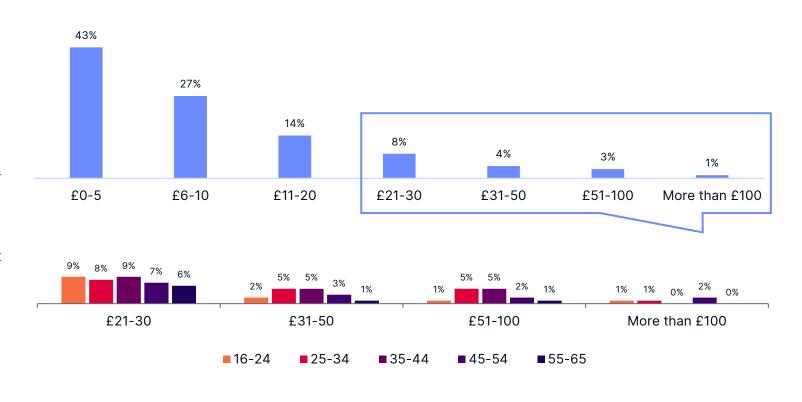


- \bigcirc
- While the chocolate calendar is the most popular Advent calendar for all ages in the UK this year (76%), DIY (do-it-yourself) calendars are also particularly popular among the younger generation.
- One percent of women and five percent of men who want to buy an Advent calendar plan to buy an erotic calendar.

How much money is spent? // Who takes part in online Advent calendars?

Willingness to pay for calendars and popularity of digital calendars

How much **money** are you willing to spend on an advent calendar??



• **Fifteen percent** of those are planning to buy / create an Advent calendar this year are **willing to spend more than £20** on it, with only 4% willing to spend more than £50. Surprising: the 25 to 34 year-olds are most likely to be willing to spend more than £20 on an Advent calendar (19%).



- At a share of 18 percent, Gen Zs are more likely to have participated in an online advent calendar than the other age groups.
- Cadbury's (7%) and Dorset (4%) were the most mentioned brands for online Advent calendars.



04 Concerns during Covid

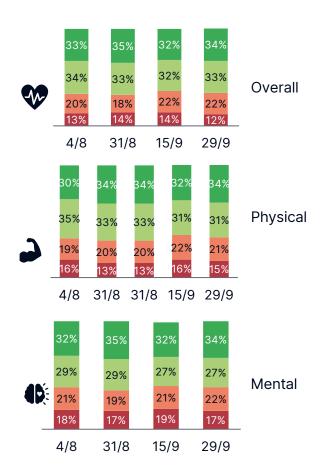
Feelings, concerns, & worries



How do you feel?

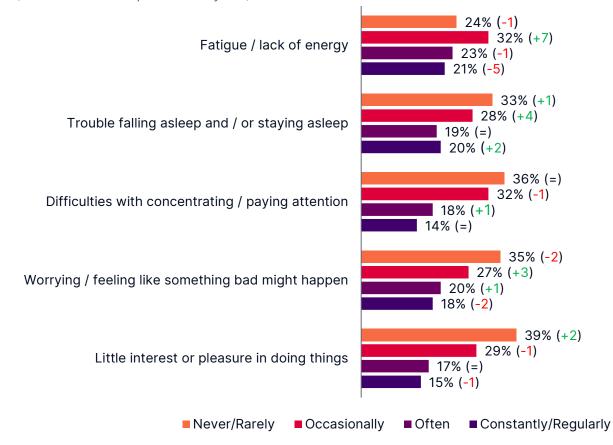
Total sample

How do you feel?



How often have you experienced the following emotions / symptoms during the last one or two weeks?

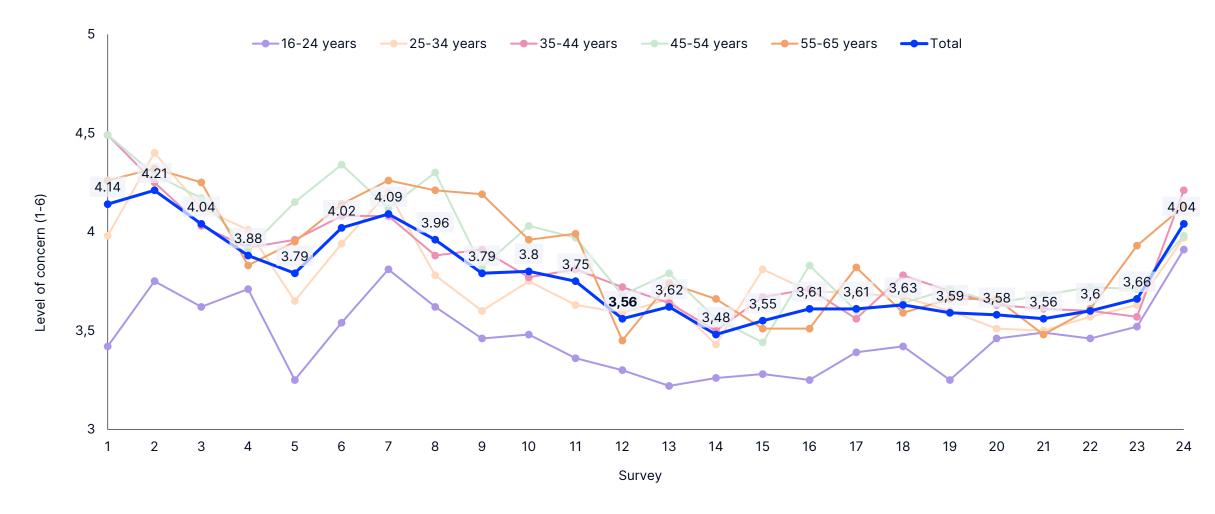
(In brackets = compared to July 7th)





To what extent are Brits worried about their own health?

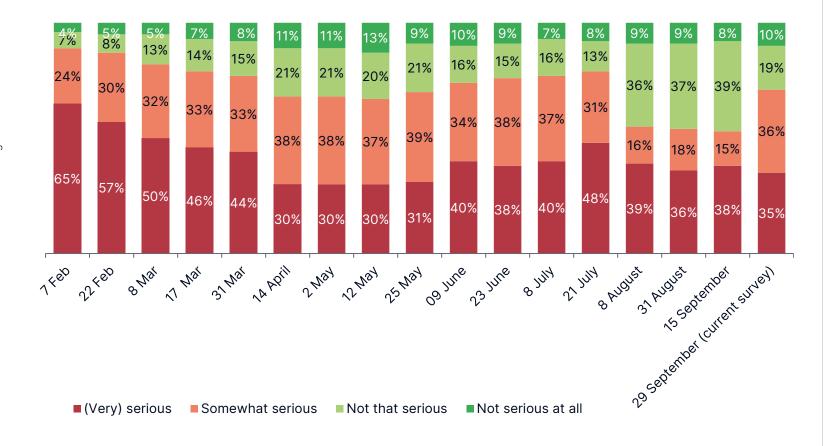
Total sample



How do Brits assess the current situation? // Satisfaction

Total sample

How do Brits assess the current pandemic situation?



How satisfied are Brits in the following areas at the moment?

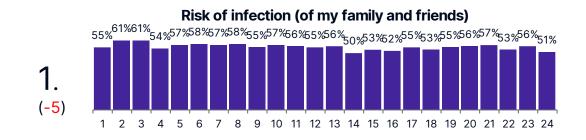
(1 = Not satisfied at all// 6 = Very satisfied)

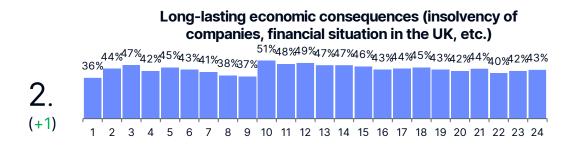
Rank	Area of life	Average
1	Safety	4.3
2	Freedom of movement / mobility	4.1
3	Entertainment	4.0
4	Relationships / romantic dates	3.9
5	Nutrition/diet	3.8
5	Education / work	3.7
6	Social life	3.6
8	Holidays / travel	3.1



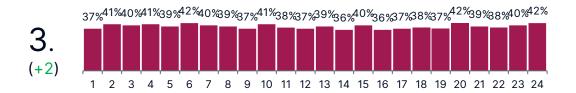
What are the biggest concerns regarding the Coronavirus (1/2)

Total sample – Sorted by frequency (Numbers in brackets = change compared to the previous wave)

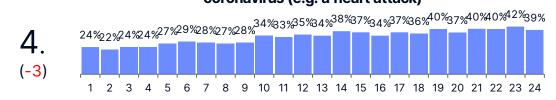




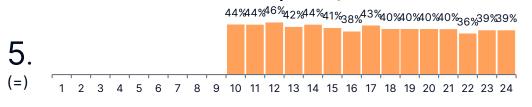




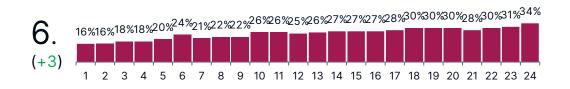
Poor health care in case of illness other than coronavirus (e.g. a heart attack)



Psychological consequences for myself and others (e.g. depression)*



Poor health care in case of infection with coronavirus

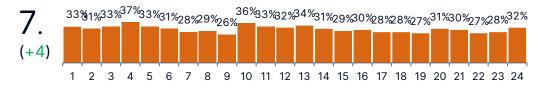




What are the biggest concerns regarding the Coronavirus? (2/2)

Total sample – Sorted by frequency (Numbers in brackets = change compared to the previous wave)

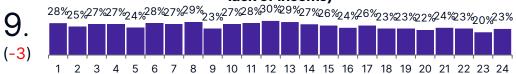
Personal financial consequences (furlough, possibility of losing my job, investments/shares)



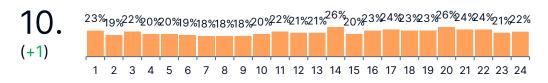
Social distancing /social exclusion of sick people / isolation*



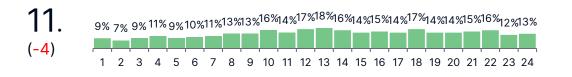
Long-term 'extinction' of gastronomy & culture (restaurants, museums etc., going bankrupt because of lack of income)



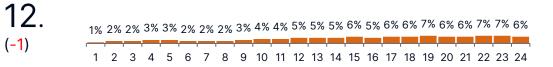
Inadequate/insufficient care for children and those in need of care (e.g. the elderly)



Not being able to host important private events (e.g., weddings, funerals)



I don't have any concerns



05 Return to normalcy

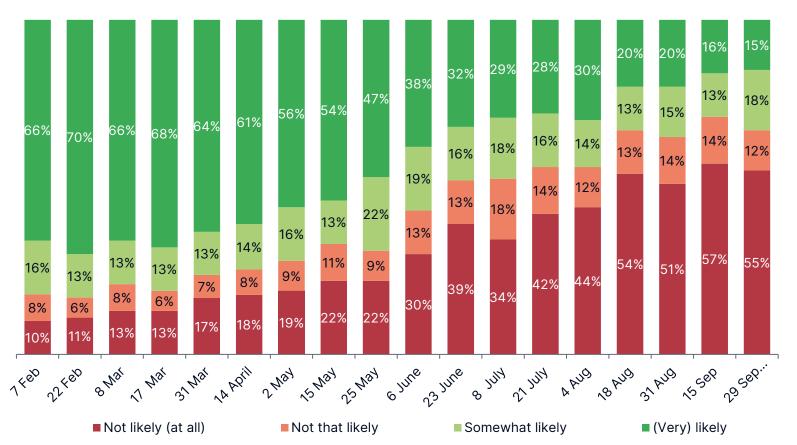
Vaccination progress and daily (work) life



Vaccination readiness and progress

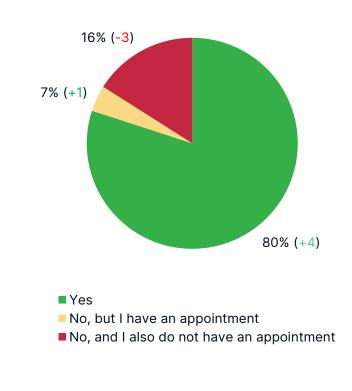
Total sample

Covid-19 vaccines are becoming increasingly available. How likely are Brits to get vaccinated when they have the opportunity?



Have you already been vaccinated against coronavirus?

(In brackets = Comparison to the week of July 21st)



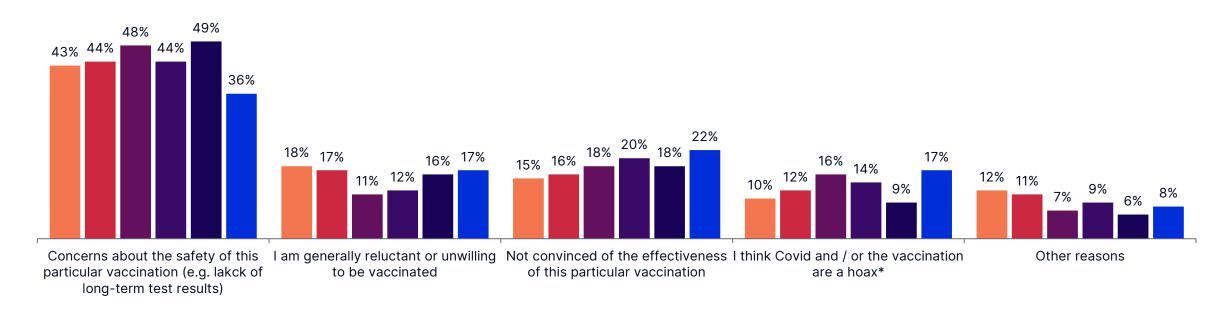


Reasons against vaccination

Respondents who responded they were not (that) likely to get vaccinated

Why would you not get vaccinated? (Multiple answers possible)





How safe are (everyday) activities rated?

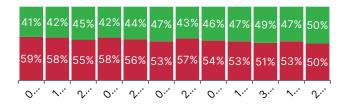
Total sample – sorted by "(rather) not safe" responses

Regardless of the currently applicable regulations - how safe do you find the following activities?

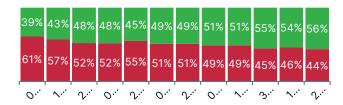
Going to large-scale events (>1000 people)



Going to the gym

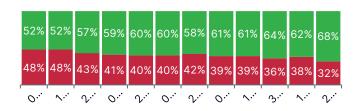


Going to the cinema

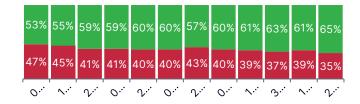


Going to a restaurant / bar

(Rather) safe Not (that) safe



Going to a shopping centre



Going to a museum





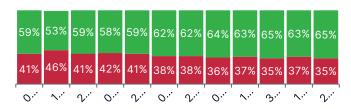
How safe are (everyday) activities rated?

Total sample

If there were no regulations in the UK, how safe would you consider the following activities?

If there are no restriction currently in place, to what extent do you consider these activities to be safe at present?

Going to the office



Going on (short) weekend trips



Going to a supermarket



(Rather) safe Not (that) safe

Visiting a group of friends (>4 people)

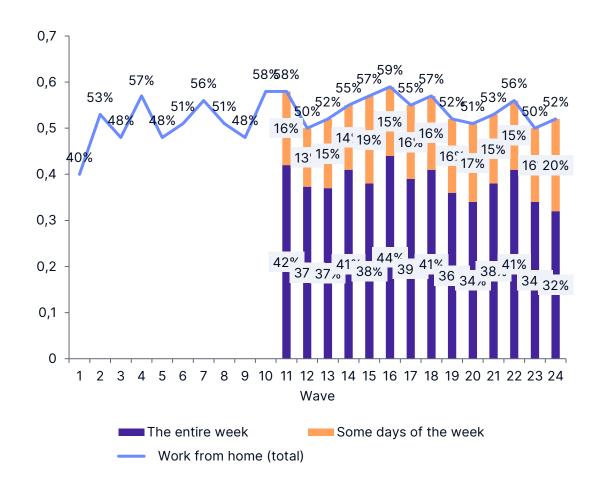




How many respondents work from home?

Currently: 52 percent of employees

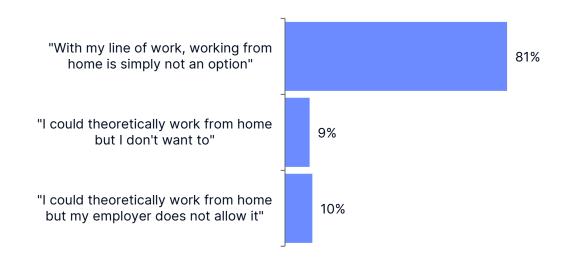
Share of employees working from home, sorted by wave



How many respondents do <u>not</u> work from home?

Currently: 49 percent of employees

Top 3 reasons why employees are not working from home

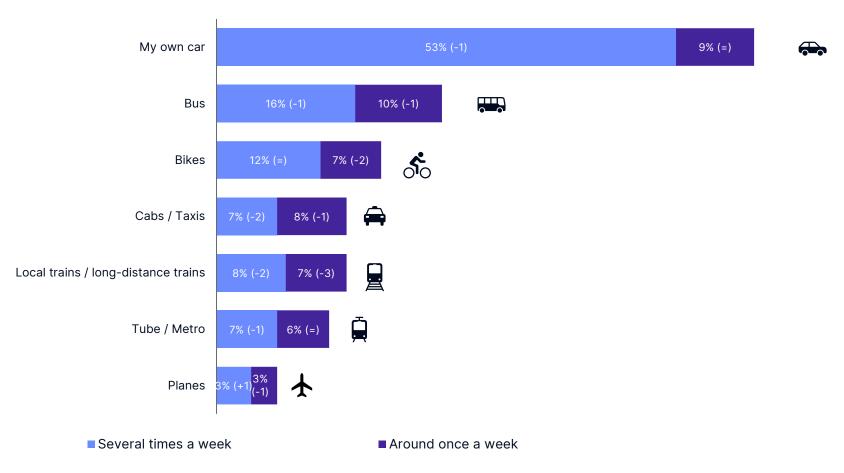


05 Return to normalcy

Transport and mobility services (1/2)

Total sample

How often do Brits use the following transportation / mobility services over the last 2 weeks?



Transport and mobility services (2/2)

Total sample

Which modes of transport / mobility services are perceived to be **the most unsafe**?

		23 March	20 May	9 August	7 February	8 March	31 March	2 May	25 May	9 June	23 June	08 July	21 July	04 August	18 August	31 August	15 Septembe r	29 Septembe r
Rank	Transportation	Wave 1 Bottom 2	Wave 3 Bottom 2	Wave 5 Bottom 2	Wave 7 Bottom 2									Wave 20 Bottom 2				
1	Metro/Tube	84%	41%	39%	67%	65%	52%	48%	45%	44%	44%	43%	45%	43%	43%	38%	43%	39%
2	→ Planes/Flights	85%	57%	56%	67%	64%	52%	49%	47%	45%	44%	41%	43%	43%	40%	37%	42%	37%
3	Ship/Ferry	81%	26%	27%	58%	54%	43%	37%	34%	34%	35%	32%	32%	31%	29%	29%	32%	31%
4	Bus	79%	50%	51%	58%	54%	38%	35%	31%	31%	33%	31%	36%	32%	30%	29%	31%	27%
5	Regional trains	81%	26%	27%	58%	54%	43%	37%	34%	34%	35%	32%	32%	30%	28%	28%	30%	26%
6	Cabs/Taxis	66%	43%	42%	51%	46%	37%	30%	27%	22%	29%	26%	28%	26%	25%	24%	27%	26%
7	Rental cars		Not	applic	able		28%	24%	21%	22%	23%	21%	21%	21%	18%	18%	19%	17



06 Consumer Behaviour

Which product categories are bought the most? How does online shopping compare to physical shopping?



How often have the following products been purchased overall? (Online and offline)

Total sample

Rank		Product category	17 March	31 March	14 April	2 May	12 May	25 May	9 June	23 June	8 July	27 July	04 August	18 August	31 August	15 Septembe r	29 September
		Food / groceries (total)	92%	92%	90%	94%	91%	92%	92%	92%	93%	93%	93%	92%	92%	91%	93% (+2)
1		online	21%	21%	20%	19%	20%	19%	22%	19%	22%	20%	20%	18%	19%	17%	21%
		offline	58%	58%	60%	61%	59%	60%	57%	60%	57%	61%	59%	62%	60%	60%	58%
	ننه	Personal-care / Hygiene (total)	70%	69%	64%	68%	70%	67%	66%	66%	70%	68%	69%	65%	67%	65%	69% (+4)
2		online	23%	21%	18%	20%	21%	19%	21%	18%	21%	19%	22%	16%	17%	16%	19%
		offline	41%	38%	39%	40%	42%	41%	38%	41%	41%	41%	39%	43%	43%	41%	41%
	八	Non-alcoholic beverages (total)	63%	64%	62%	67%	66%	63%	64%	67%	65%	68%	64%	69%	67%	63%	66% (+3)
3		online	17%	14%	14%	15%	14%	13%	15%	13%	16%	13%	15%	14%	14%	11%	13%
		offline	40%	43%	44%	46%	46%	44%	42%	46%	42%	48%	42%	48%	46%	46%	45%
		Alcoholic beverages (total)	51%	53%	50%	55%	55%	52%	58%	57%	57%	54%	54%	53%	53%	50%	54% (+ 4)
4	Y	online	14%	13%	12%	12%	12%	11%	13%	12%	14%	10%	12%	11%	11%	9%	12%
		offline	33%	24%	34%	37%	38%	36%	43%	37%	37%	38%	37%	38%	37%	37%	37%
	¥	Clothes (total)	42%	46%	45%	49%	51%	48%	50%	48%	46%	49%	52%	48%	52%	48%	49% (+1)
5		online	30%	31%	27%	26%	30%	24%	24%	24%	25%	26%	27%	23%	27%	23%	24%
		offline	7%	10%	12%	19%	14%	16%	18%	15%	13%	15%	18%	17%	17%	18%	16%
		Medications (total)	40%	45%	39%	40%	43%	41%	44%	43%	44%	41%	44%	39%	43%	42%	43% (+1)
6	Ę	online	12%	14%	12%	10%	12%	10%	13%	12%	11%	11%	14%	10%	10%	10%	10%
		offline	25%	24%	23%	27%	27%	27%	27%	26%	27%	26%	26%	25%	28%	28%	28%

28

How often have the following products been purchased overall? (Online and offline)

Total sample

Rank		Product category	17 March	31 March	14 April	2 May	12 May	25 May	9 June	23 June	8 July	21 July	04 August	18 August	31 August	15 Septemb er	29 September
		Beauty products / Make-up (total)	31%	35%	34%	30%	35%	35%	34%	31%	36%	33%	36%	31%	34%	31%	34% (+1)
7		online	17%	17%	16%	14%	17%	15%	16%	11%	15%	14%	16%	12%	12%	13%	15%
		offline	10%	12%	13%	12%	13%	15%	13%	15%	16%	14%	14%	15%	15%	14%	14%
		Books / Magazines (total)	32%	33%	32%	32%	31%	34%	34%	32%	32%	33%	34%	33%	38%	33%	32% (-1)
8		online	19%	16%	17%	16%	14%	16%	16%	14%	16%	14%	15%	15%	16%	15%	15%
		offline	11%	11%	12%	13%	13%	13%	13%	14%	12%	14%	15%	14%	17%	15%	13%
		Shoes (total)	25%	30%	27%	29%	30%	32%	32%	29%	30%	30%	33%	31%	34%	27%	31% (+4)
9		online	16%	20%	15%	15%	19%	17%	15%	15%	17%	16%	17%	17%	16%	14%	14%
	Ì	offline	7%	6%	9%	10%	9%	10%	13%	10%	9%	10%	11%	10%	13%	10%	11%
10		Toys (board games, video games, etc.) (total)*	24%	25%	21%	23%	22%	26%	27%	25%	29%	27%	27%	26%	29%	26%	28% (+2)
10		online	15%	14%	13%	12%	13%	14%	13%	11%	15%	14%	13%	14%	13%	14%	13%
		offline	5%	8%	5%	7%	6%	8%	10%	9%	9%	8%	10%	9%	11%	9%	10%
	***	Decorative items / knick-knacks (total)	22%	27%	25%	23%	28%	27%	27%	24%	27%	29%	27%	24%	25%	25%	25% (=)
11		online	13%	11%	11%	11%	12%	12%	11%	10%	11%	13%	11%	10%	11%	9%	9%
		offline	7%	10%	9%	10%	11%	11%	11%	10%	11%	11%	12%	11%	9%	11%	11%
12		Electrical equipment / consumer elctronics (total)	26%	27%	23%	25%	25%	26%	27%	24%	25%	26%	27%	24%	28%	23%	24% (+1)
12		online	16%	15%	13%	15%	15%	15%	14%	13%	15%	15%	15%	13%	15%	12%	12%
		offline	7%	8%	7%	6%	6%	7%	8%	8%	7%	7%	8%	8%	8%	7%	8%



How often have the following products been purchased overall? (Online and offline)

Total sample

Ran k		Product category	17 March	31 March	14 April	2 May	12 May	25 May	9 June	23 June	8 July	21 July	04 August	18 August	31 August	15 Septembe r	29 September
	ı	Household appliances (total)	25%	30%	25%	23%	25%	25%	25%	23%	26%	26%	28%	23%	27%	21%	24% (+3)
13	9	online	13%	15%	13%	10%	12%	12%	11%	10%	12%	12%	13%	10%	12%	8%	11%
		offline	8%	11%	8%	8%	10%	9%	11%	9%	10%	9%	10%	10%	9%	12%	9%
		Tableware / kitchen equipm. (total)	20%	25%	18%	21%	21%	22%	23%	21%	23%	21%	22%	20%	24%	19%	21% (+2)
14		online	8%	11%	8%	9%	10%	9%	11%	10%	10%	8%	9%	8%	10%	8%	7%
		offline	9%	9%	7%	9%	8%	9%	8%	7%	9%	9%	10%	9%	10%	8%	10%
	•	Sports / fitness equipm. (total)	20%	23%	18%	20%	22%	20%	21%	20%	22%	21%	22%	20%	21%	20%	21% (-1)
15	20	online	12%	15%	10%	10%	12%	10%	9%	9%	12%	11%	12%	11%	11%	9%	8%
		offline	5%	5%	6%	7%	6%	7%	9%	7%	7%	6%	7%	5%	5%	7%	7%
		Jewelry	18%	20%	17%	15%	18%	18%	20%	18%	23%	19%	21%	20%	22%	16%	18% (+2)
16		online	11%	11%	9%	8%	9%	10%	11%	10%	10%	10%	10%	9%	10%	7%	8%
		offline	5%	5%	5%	6%	5%	6%	6%	6%	7%	7%	8%	7%	7%	6%	6%
		Furniture	18%	21%	18%	17%	17%	19%	20%	17%	20%	18%	20%	17%	19%	17%	16% (-1)
17		online	10%	11%	10%	6%	10%	8%	9%	7%	10%	10%	9%	8%	8%	8%	8%
		offline	5%	6%	5%	6%	5%	6%	7%	6%	7%	5%	7%	6%	8%	5%	5%



In Focus: Online vs. Offline Shopping

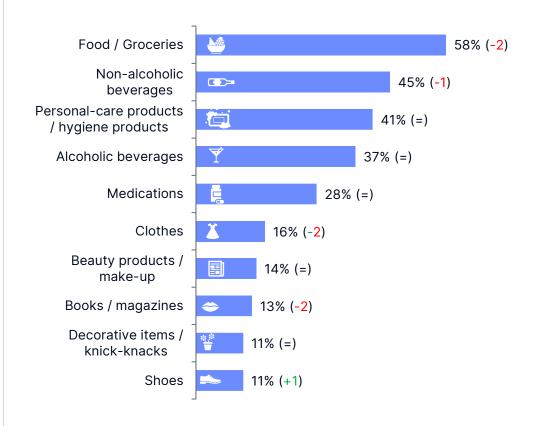
Total sample

Top 10: Bought online in the last week

(In brackets = compared to the week of September 15th)



Top 10: Bought offline in the last week



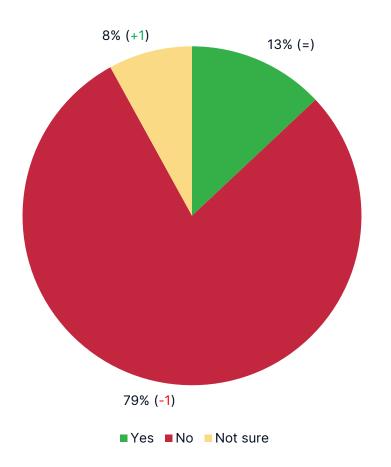
06 Consumer behaviour

Consumer Barometer

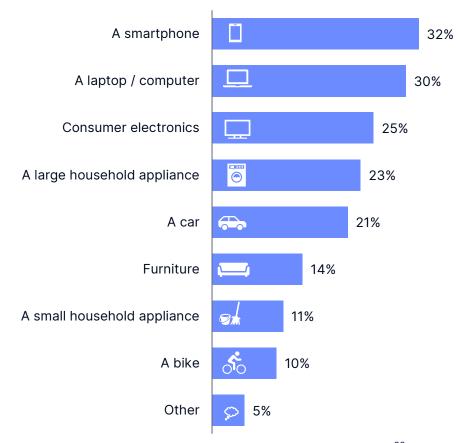
Total sample

Do you have a major purchase planned in the next two weeks?

(In brackets = change compared to previous Wave)



What are Brits planning to buy?



Your contact persons

For Studies



Louise Leitsch Head of Research Consulting Office +49 40 2286 57 312 E-mail louise.leitsch@appinio.com



Christopher Dahl Team Lead Research Consulting

Office +49 40 2286 57 313



For Marketing and PR enquiries



Juliane Ramme Marketing Manager Office +49 40 4134 9710 E-mail juliane.ramme@appinio.com





Appinio Germany Jungfernstieg 49 20354 Hamburg

Appinio USA 1355 Market St 94301 San Francisco



Surveys and dates

2020	2021
Wave 1 - 21.03.2020	Wave 7 – 07.02.2021
Wave 2 – 21.04.2020	Wave 8 – 22.02.2021
Wave 3 – 20.05.2020	Wave 9 – 08.03.2021
Wave 4 - 22.06.2020	Wave 10 – 17.03.2021
Wave 5 – 09.08.2020	Wave 11 – 31.03.2021
Wave 6 – 22.01.2021	Wave 12 - 14.04.2021
	Wave 13 - 02.05.2021
	Wave 14 – 12.05.2021
	Wave 15 - 25.05.2021
	Wave 16 - 09.06.2021
	Wave 17 – 23.06.2021
	Wave 18 - 08.07.2021
	Wave 19 – 21.07.2021
	Wave 20 - 04.08.2021
	Wave 21 – 18.08.2021
	Wave 22 – 31.08.2021
	Wave 23 – 15.09.2021
	Wave 24 – 29.09.2021

Sample composition

Age & Gender - All Surveys

