

# 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.

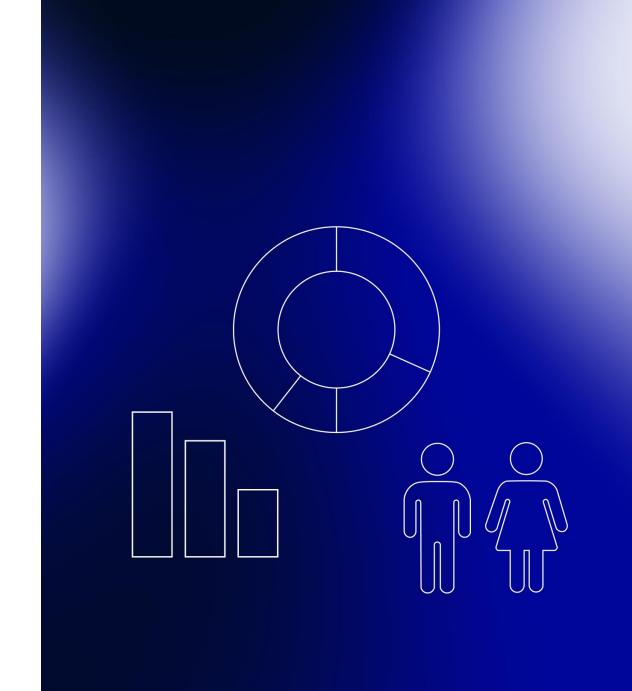
All data and other filtering options (e.g., age or gender) can be viewed in real time on our research platform: research.appinio.com. This report is also available in other European countries, namely France and Spain, but not Germany.

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.

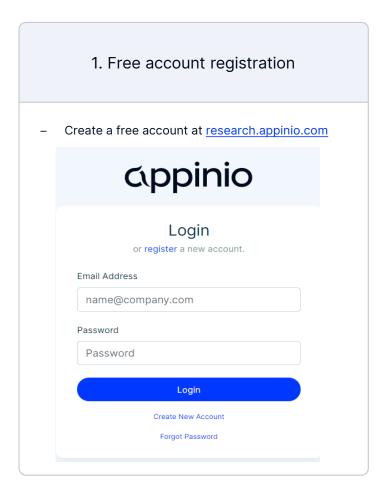
Yours, Jonathan Kurfess

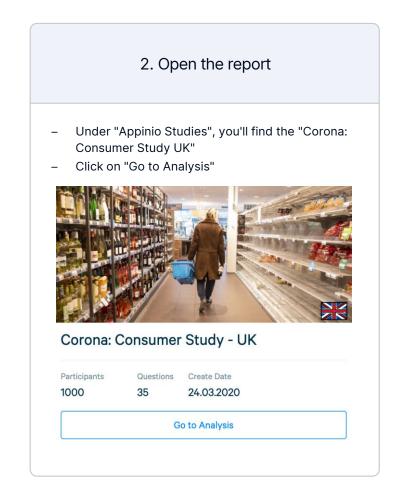
# 01 Study design & sample

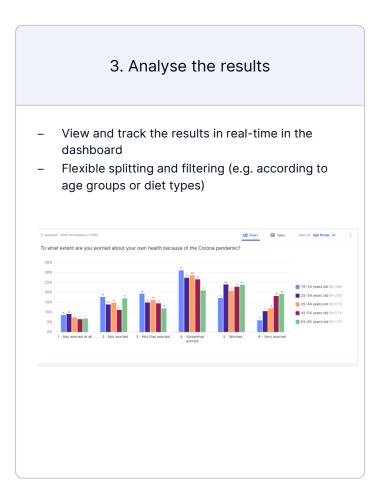


# Access to the studies and the tracking-data

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 December 08 and December 12, 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 29: N=1000

#### Content

- Current additional questions:

#### **Electricity price boom**

- How much is the electricity in the UK? And who recently noticed a price increase?
- How worried are Brits about the rising prices?
   As a consequence, who plans to change their provider?
- Which tips and tricks are used to reduce power consumption and costs?

# 02 Key Insights



## **Key Insights – Additional Questions**

The week's most interesting insights at a glance



Two in five has shopped or plans to shop in the winter sales - fashion is most popular category

- Almost a third of Brits (29%) say they have already bought something, one in five (19%) are still unsure and may still be persuaded by tempting offers.
- Almost one in two 16–24-year-olds have already bought something (45%) & one in five (19%) plans to buy something. The older segments are not so easily swayed buy the bargains.
- The clear favourite among the product categories in the winter sales is fashion/clothing. The majority of bargain hunters (58%) have bought already fashion items. This category is also the most coveted by those that plan to buy something during the winter sales (58%).
- The most coveted fashion/clothing items are winter clothing (65%), but also summer clothing (43%), winter footwear ranks third (36%).



Focus on fashion: Primark is top of mind, every third person buys exclusively online

- Fashion: Two in five (40%) bargain hunters plan to or have already hit Primark stores. In second and third place are H&M (38%) and Nike (38%).
- While Generation Z in particular plans to buy Nike (54%), the older generation of 55-65 year-olds focuses on Next (58%).
- For fashion items, one in two (50%) have spent / are willing to spend more than £100, one in five (20%) plan to spend between £81 and £100.
- Online is the preferred channel to spend money on fashion: One third (36%) plan to shop exclusively online, half (52%) want to shop both online and offline.



Buying criteria: shipping costs & easy returns are the most important

- The top 3 criteria in winter sales for the majority are: 1. Shipping cost (85%); 2. Right of return/free return (84%) 3. Warranty (80%)
- While younger segments focus on sustainability when shopping during the winter sales, older consumers pay attention to warranties.
- Women place more value on uncomplicated returns than men (65% vs. 51%).

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# 03 Additional questions

#### **Sales 2022**

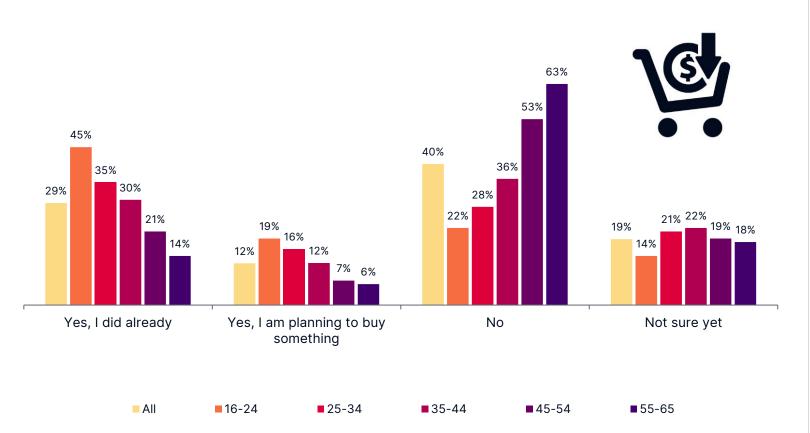
- Who is planning to hit the winter sales this year? Which products are the most coveted?
- Bargain hunters: fashion. Which products and brands are particularly popular? And which brands are consumer favourites?
- Where will people shop and how much money will they spend?



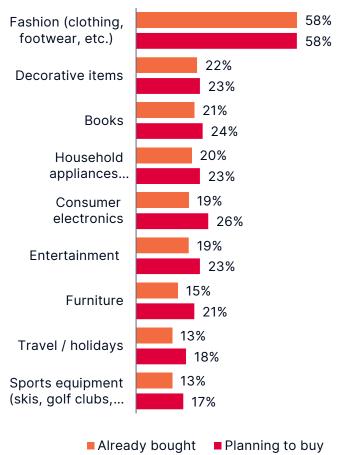
## The younger segments are the most proactive when it comes to winter sales

Almost one in two 16–24-year-olds have already bought something (45%) & one in five (19%) plans to buy something

Do you plan to buy anything in the winter sales?



What kind of product categories do you **plan to buy /** have you bought during the winter sales in 2022?



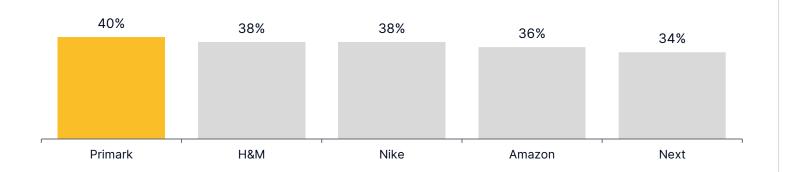
## Fashion focus: Primark is still the go-to place for bargain hunters

Primark is more popular among Gen Z, while Next is the most popular for 55–65-year-old shoppers

From which of the following stores/brands have you bought / do you think you will buy fashion items during the winter sales in 2022?

# **Two in five (40%)**

are planning to, or have already, hit **Primark**.



When you think about the winter sales, which fashion brand comes to mind first? [Open text question]

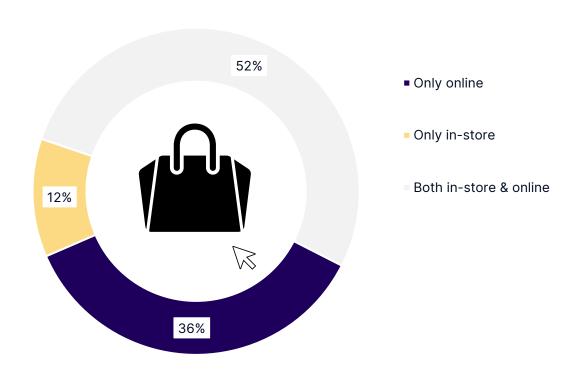


The North Face (3%)

# Fashion focus: one in two (52%) buys/plans to buy in-store & online in equal measure

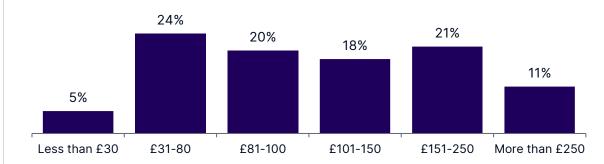
One in two is ready to spend / has already spent more than £100

Where do you mostly plan to buy / have you bought fashion items during the 2022 winter sales?



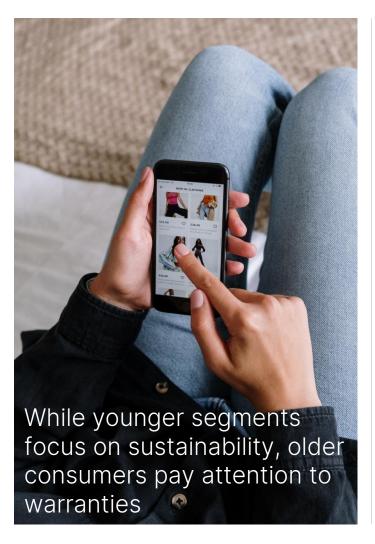
How much money do you think you will spend / you've spent on fashion items during the winter sales in 2022?



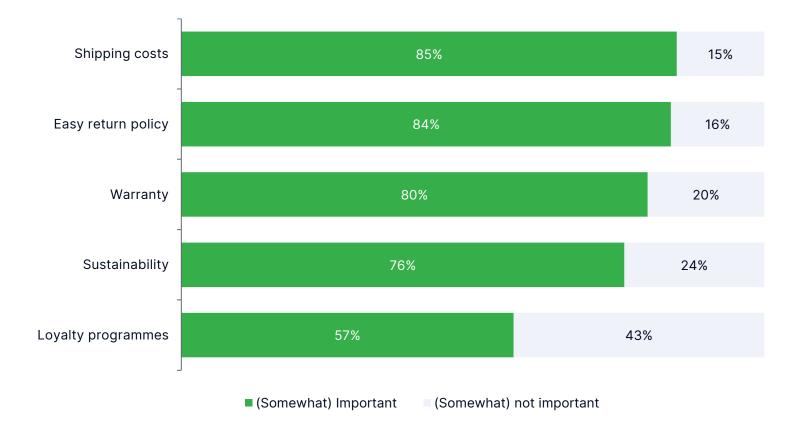


## Shipping costs & easy returns are the most important criteria

Women place more value on uncomplicated returns than men (65% vs. 51%)



To what extent do you think the following is important when shopping during the 2022 winter sales?



# 04 Concerns during Covid

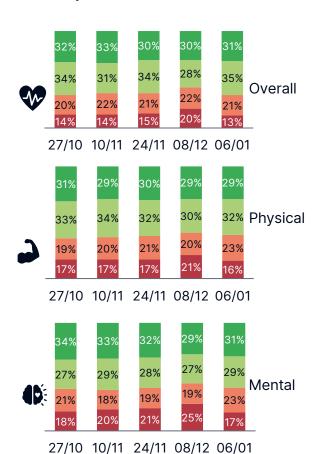
Feelings, concerns, & worries



## How do you feel?

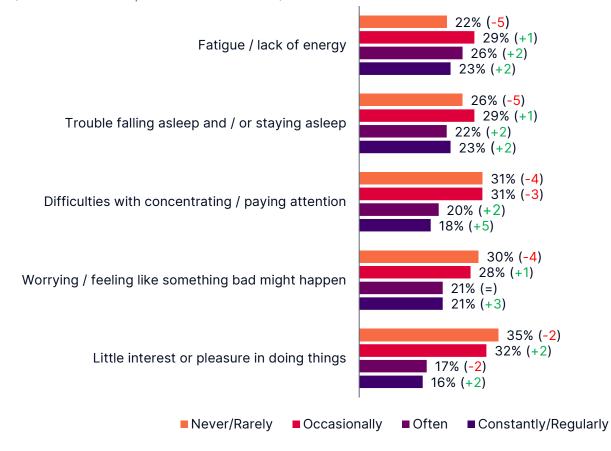
Total sample

How do you feel?



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

(In brackets = compared to October 27th)





### To what extent are Brits worried about their own health?

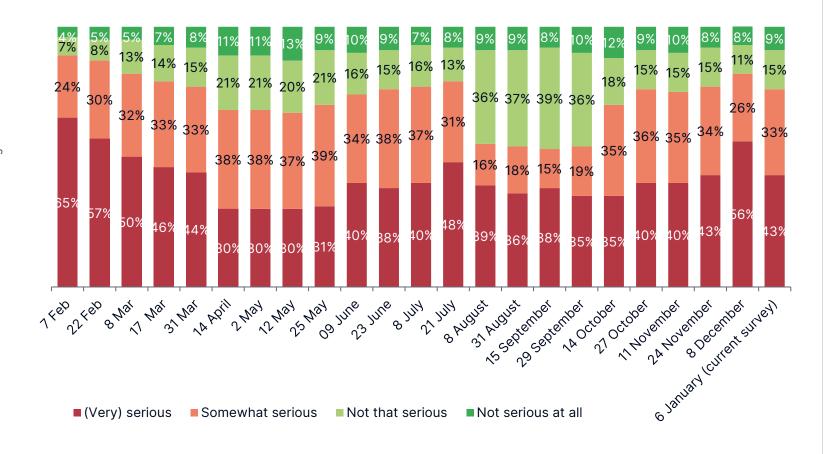
Total sample



## 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?

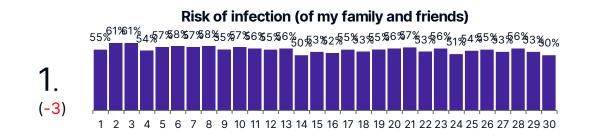
(1 = Not satisfied at all// 6 = Very satisfied)

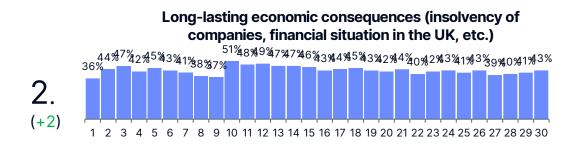
Rank	Area of life	Average
1	Safety	4.4
2	Freedom of movement / mobility	4.1
3	Entertainment	4.0
4	Relationships / romantic dates	3.9
5	Nutrition/diet	3.7
5	Education / work	3.7
6	Social life	3.6
8	Holidays / travel	3.2

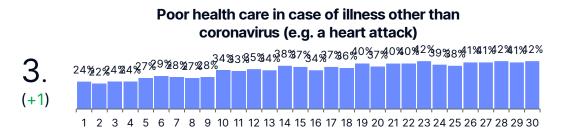


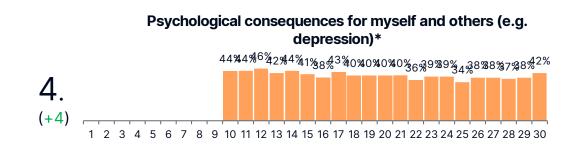
# What are the biggest concerns regarding the Coronavirus (1/2)

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

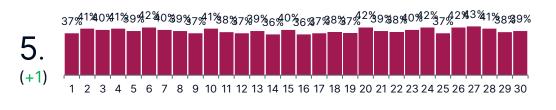




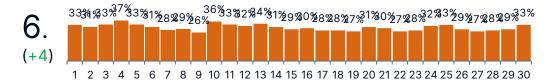








# Personal financial consequences (furlough, possibility of losing my job, investments/shares)

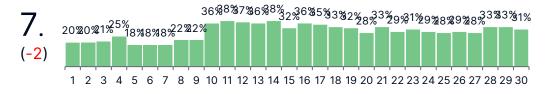




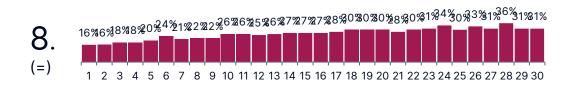
# What are the biggest concerns regarding the Coronavirus? (2/2)

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

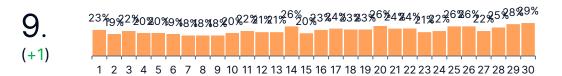
# Social distancing /social exclusion of sick people / isolation\*



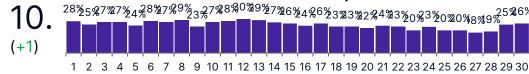
#### Poor health care in case of infection with coronavirus



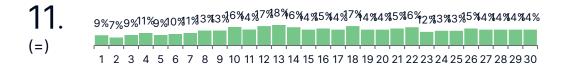
# Inadequate/insufficient care for children and those in need of care (e.g. the elderly)



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



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



#### I don't have any concerns





# 05 Return to normalcy

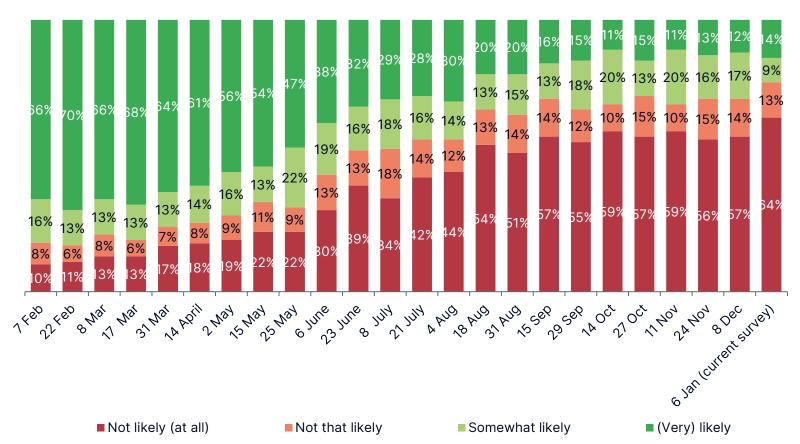
Vaccination progress and daily (work) life



## Vaccination readiness and progress

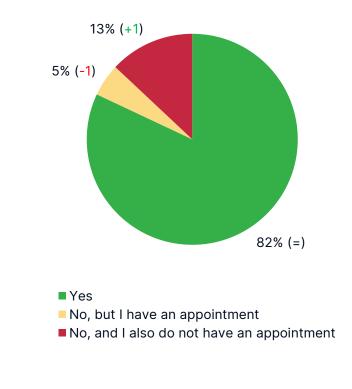
#### Total sample

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)





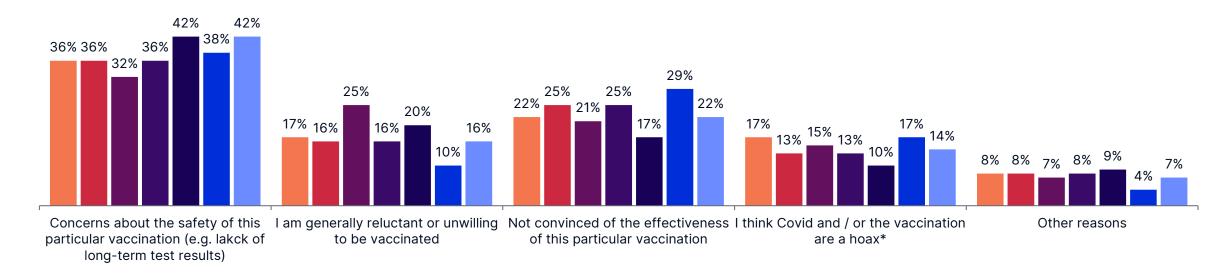
35 Return to normalcy

### Reasons against vaccination

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

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

■29th September ■14th October ■27th October ■11th November ■24th November ■8th December ■6th January



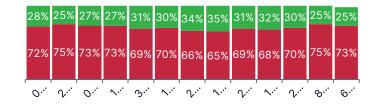


# How safe are (everyday) activities rated?

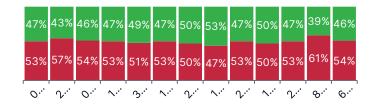
Total sample – sorted by "(rather) not safe" responses

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

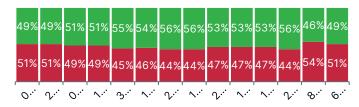
#### Going to large-scale events (>1000 people)



#### Going to the gym



#### Going to the cinema

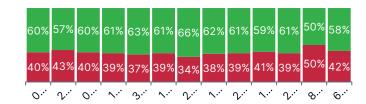


#### Going to a restaurant / bar

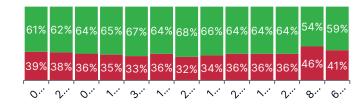


(Rather) safe Not (that) safe

#### Going to a shopping centre



#### Going to a museum





N = 1000)

# How safe are (everyday) activities rated?

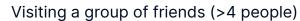
#### Total sample

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?







(Rather) safe Not (that) safe



#### Going to a supermarket

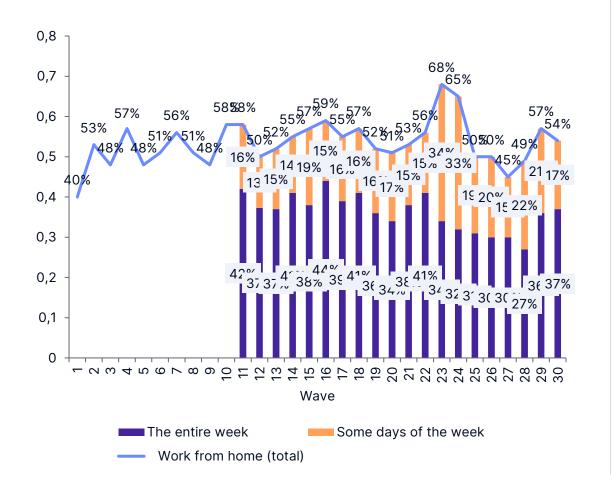




# How many respondents work from home?

#### Currently: 54 percent of employees

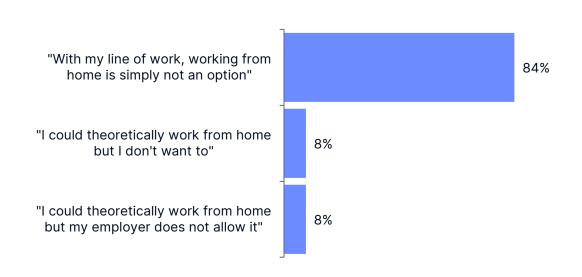
Share of employees working from home, sorted by wave



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

#### Currently: 46 percent of employees

Top 3 reasons why employees are not working from home:

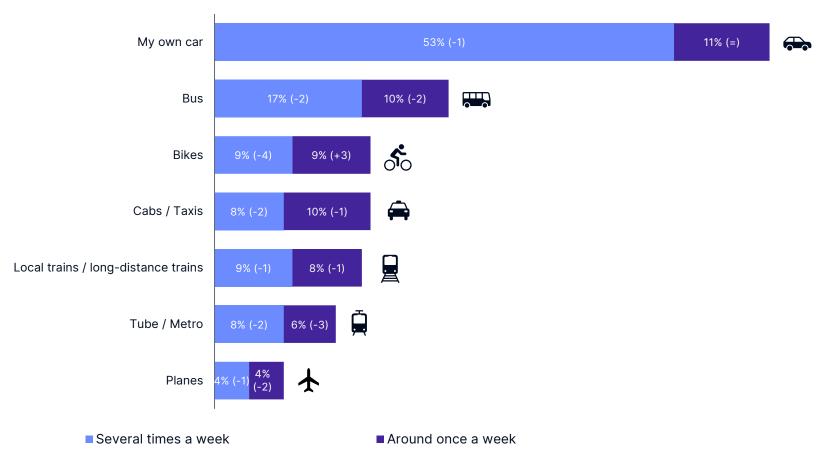


05 Return to normalcy

# 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**?

			9 August	7 February	8 March	31 March	2 May	25 May	23 June	21 July	18 August	15 September	14 October	11 November	08 December	06 January
Rank		Transportation	Wave 5 Bottom 2	Wave 7 Bottom 2	Wave 9 Bottom 2	Wave 11* Bottom 2	Wave 13 Bottom 2	Wave 15 Bottom 2	Wave 17 Bottom 2	Wave 19 Bottom 2	Wave 21 Bottom 2	Wave 23 Bottom 2	Wave 25 Bottom 2	Wave 27 Bottom 2	Wave 29 Bottom 2	Wave 30 Bottom 2
1	Ē	Metro/Tube	39%	67%	65%	52%	48%	45%	44%	45%	43%	43%	39%	41%	50%	42%
2	7	Planes/Flights	56%	67%	64%	52%	49%	47%	44%	43%	40%	42%	38%	38%	46%	40%
3		Regional trains	51%	58%	54%	38%	35%	31%	33%	36%	30%	31%	30%	31%	38%	31%
4		Bus	27%	58%	54%	43%	37%	34%	35%	32%	29%	32%	28%	30%	37%	31%
5		Ship/Ferry	27%	58%	54%	43%	37%	34%	35%	32%	28%	30%	26%	29%	37%	31%
6	<b></b>	Cabs/Taxis	42%	51%	46%	37%	30%	27%	29%	28%	25%	27%	23%	26%	33%	25%
7	<b>↔</b>	Rental cars	No	ot applicab	le	28%	24%	21%	23%	21%	18%	19%	20%	19%	22%	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	I 2 May	12 May	25 May	9 June	23 June	8 July	27 July	, 04 August	18 August	31 t August	15 September	29 September	14 October	31 October	10 November	24 November	8 December	6 January
1		Food / groceries (total)	92%	92%	90%	94%	91%	92%	92%	92%				92%		91%	93%	90%	93%	92%	92%	90%	90% (=)
'		online	21%	21%	20%	19%	20%	19%	22%	19%	22%	20%	20%	18%	19%	17%	21%	17%	19%	19%	18%	21%	21%
		offline	58%	58%	60%	61%	59%	60%	57%	60%	57%	61%	59%	62%	60%	60%	58%	60%	61%	60%	60%	53%	53%
2		Personal-care / Hygiene (total)	70%	69%	64%	68%	70%	67%	66%	66%	70%	68%	69%	65%	67%	65%	69%	67%	68%	68%	69%	72%	69% ( <del>-3</del> )
		online	23%	21%	18%	20%	21%	19%	21%	18%	21%	19%	22%	16%	17%	16%	19%	19%	16%	19%	19%	22%	21%
		offline	41%	38%	39%	40%	42%	41%	38%	41%	41%	41%	39%	43%	43%	41%	41%	39%	45%	42%	41%	40%	40%
3	ĕ	Non-alcoholic beverages (total)	63%	64%	62%	67%	66%	63%	64%	67%	65%	68%	64%	69%	67%	63%	66%	65%	64%	62%	63%	67%	66% ( <del>-1</del> )
	انا	online	17%	14%	14%	15%	14%	13%	15%	13%	16%	13%	15%	14%	14%	11%	13%	12%	14%	11%	13%	16%	14%
		offline	40%	43%	44%	46%	46%	44%	42%	46%	42%	48%	42%	48%	46%	46%	45%	47%	44%	44%	42%	44%	44%
4	<b>\</b>	Alcoholic beverages (total)	51%	53%	50%	55%	55%	52%	58%	57%	57%	54%	54%	53%	53%	50%	54%	52%	51%	56%	52%	58%	50% (-8)
•	<del> </del>	online	14%	13%	12%	12%	12%	11%	13%	12%	14%	10%	12%	11%	11%	9%	12%	11%	11%	11%	12%	13%	10%
		offline	33%	24%	34%	37%	38%	36%	43%	37%	37%	38%	37%	38%	37%	37%	37%	35%	35%	39%	35%	37%	34%
5	x	Clothes (total)	42%	46%	45%	49%	51%	48%	50%	48%	46%	49%	52%	48%	52%	48%	49%	51%	52%	51%	50%	58%	52% (- <mark>6</mark> )
J		online	30%	31%	27%	26%	30%	24%	24%	24%	25%	26%	27%	23%	27%	23%	24%	25%	23%	27%	24%	32%	26%
		offline	7%	10%	12%	19%	14%	16%	18%	15%	13%	15%	18%	17%	17%	18%	16%	17%	21%	16%	17%	16%	16%
6	Ę	Medications (total)	40%	45%	39%	40%	43%	41%	44%	43%	44%	41%	44%	39%	43%	42%	43%	46%	47%	45%	47%	49%	47% (-2)
		online	12%	14%	12%	10%	12%	10%	13%	12%	11%	11%	14%	10%	10%	10%	10%	11%	11%	12%	10%	13%	12%
		offline	25%	24%	23%	27%	27%	27%	27%	26%	27%	26%	26%	25%	28%	28%	28%	29%	31%	28%	30%	30%	29%



# 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 September	29 September	14 October	31 October	10 November	24 November	8 December	6 January
7		Books / Magazines (total)	32%	33%	32%	32%	31%	34%	34%	32%	32%					33%	32%	34%	34%	34%	34%	42%	37% (-5)
′		online	19%	16%	17%	16%	14%	16%	16%	14%	16%	14%	15%	15%	16%	15%	15%	14%	15%	17%	16%	20%	17%
		offline	11%	11%	12%	13%	13%	13%	13%	14%	12%	14%	15%	14%	17%	15%	13%	16%	16%	14%	13%	15%	14%
8	₩	Toys (board games, video games, etc.) (total)*	24%	25%	21%	23%	22%	26%	27%	25%	29%	27%	27%	26%	29%	26%	28%	30%	29%	33%	35%	42%	31% (- 11)
		online	15%	14%	13%	12%	13%	14%	13%	11%	15%	14%	13%	14%	13%	14%	13%	12%	13%	16%	19%	22%	15%
		offline	5%	8%	5%	7%	6%	8%	10%	9%	9%	8%	10%	9%	11%	9%	10%	11%	12%	11%	10%	13%	10%
9	<b>*</b>	Beauty products / Make-up (total)	31%	35%	34%	30%	35%	35%	34%	31%	36%	33%	36%	31%	34%	31%	32%	36%	34%	35%	35%	40%	35% (- <del>5</del> )
		online	17%	17%	16%	14%	17%	15%	16%	11%	15%	14%	16%	12%	12%	13%	15%	13%	15%	16%	15%	20%	14%
		offline	10%	12%	13%	12%	13%	15%	13%	15%	16%	14%	14%	15%	15%	14%	14%	17%	15%	14%	14%	15%	15%
10		Decorative items / knick-knacks (total)	22%	27%	25%	23%	28%	27%	27%	24%	27%	29%	27%	24%	25%	25%	25%	27%	27%	29%	30%	39%	31% (-8)
		online	13%	11%	11%	11%	12%	12%	11%	10%	11%	13%	11%	10%	11%	9%	9%	9%	11%	11%	12%	15%	14%
		offline	7%	10%	9%	10%	11%	11%	11%	10%	11%	11%	12%	11%	9%	11%	11%	12%	11%	13%	12%	16%	12%
11		Shoes (total)	25%	30%	27%	29%	30%	32%	32%	29%	30%	30%	33%	31%	34%	27%	31%	32%	32%	31%	31%	38%	35% (- <mark>3</mark> )
''		online	16%	20%	15%	15%	19%	17%	15%	15%	17%	16%	17%	17%	16%	14%	14%	16%	14%	15%	15%	18%	17%
		offline	7%	6%	9%	10%	9%	10%	13%	10%	9%	10%	11%	10%	13%	10%	11%	10%	14%	12%	10%	14%	13%
12	<u></u>	Electrical equipment / consumer elctronics (total)	26%	27%	23%	25%	25%	26%	27%	24%		26%	27%	24%	28%	23%	24%	25%	25%	25%	30%	34%	29% (-5)
		online	16%	15%	13%	15%	15%	15%	14%	13%	15%	15%	15%	13%	15%	12%	12%	12%	13%	13%	15%	18%	14%
		offline	7%	8%	7%	6%	6%	7%	8%	8%	7%	7%	8%	8%	8%	7%	8%	8%	8%	8%	9%	9%	9%

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# 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 September	29 September	14 October	31 October	11 November	24 November	8 December	6 January
13		Household appliances (total)	25%	30%	25%	23%	25%	25%	25%		26%		28%			21%	24%	25%	26%	25%	27%	30%	30% (=)
13	94	online	13%	15%	13%	10%	12%	12%	11%	10%	12%	12%	13%	10%	12%	8%	11%	9%	10%	11%	11%	12%	14%
		offline	8%	11%	8%	8%	10%	9%	11%	9%	10%	9%	10%	10%	9%	12%	9%	9%	10%	10%	11%	13%	12%
14	Ŏ	Jewelry	18%	20%	17%	15%	18%	18%	20%	18%	23%	19%	21%	20%	22%	16%	18%	21%	19%	20%	23%	27%	24% (- <mark>3</mark> )
		online	11%	11%	9%	8%	9%	10%	11%	10%	10%	10%	10%	9%	10%	7%	8%	10%	9%	9%	12%	13%	11%
		offline	5%	5%	5%	6%	5%	6%	6%	6%	7%	7%	8%	7%	7%	6%	6%	7%	7%	7%	7%	9%	8%
15		Tableware / kitchen equipm. (total)	20%	25%	18%	21%	21%	22%	23%	21%	23%	21%	22%	20%	24%	19%	21%	22%	22%	23%	24%	26%	26% (=)
		online	8%	11%	8%	9%	10%	9%	11%	10%	10%	8%	9%	8%	10%	8%	7%	8%	8%	9%	9%	13%	10%
		offline	9%	9%	7%	9%	8%	9%	8%	7%	9%	9%	10%	9%	10%	8%	10%	10%	11%	10%	9%	12%	11%
16	<b>%</b>	Sports / fitness equipm. (total)	20%	23%	18%	20%	22%	20%	21%	20%	22%	21%	22%	20%	21%	20%	19%	20%	19%	20%	21%	26%	24% (- <mark>2</mark> )
'	00	online	12%	15%	10%	10%	12%	10%	9%	9%	12%	11%	12%	11%	11%	9%	8%	9%	10%	9%	9%	12%	11%
		offline	5%	5%	6%	7%	6%	7%	9%	7%	7%	6%	7%	5%	5%	7%	7%	7%	6%	7%	7%	8%	8%
17		Furniture	18%	21%	18%	17%	17%	19%	20%	17%	20%	18%	20%	17%	19%	17%	16%	20%	18%	18%	19%	23%	23% (=)
''		online	10%	11%	10%	6%	10%	8%	9%	7%	10%	10%	9%	8%	8%	8%	8%	8%	7%	8%	6%	10%	10%
		offline	5%	6%	5%	6%	5%	6%	7%	6%	7%	5%	7%	6%	8%	5%	5%	7%	7%	7%	7%	9%	9%



## In Focus: Online vs. Offline Shopping

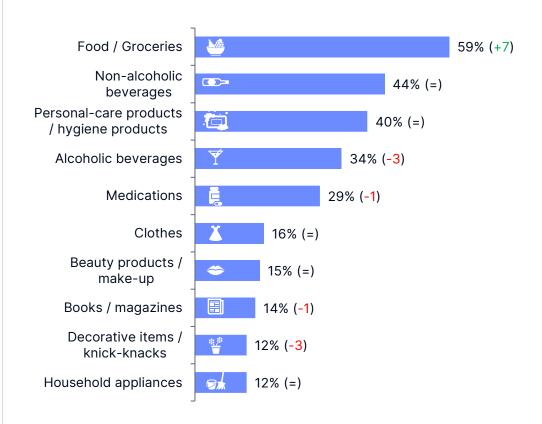
#### Total sample

Top 10: Bought online in the last week

(In brackets = compared to the week of December 9th)



Top 10: Bought offline in the last week

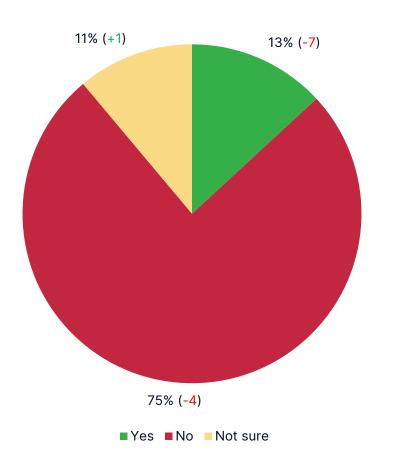


#### **Consumer Barometer**

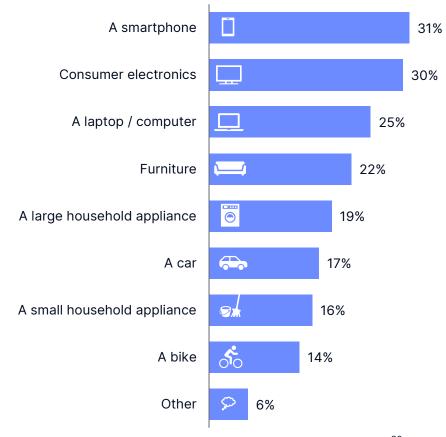
#### Total sample

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?



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# Your contact persons

#### **For Studies**



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# Surveys and dates

2020	2021	2022
Wave 1 - 21.03.2020	Wave 7 – 07.02.2021	Wave 30 – 06.01.2022
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	
	Wave 25 – 14.10.2021	
	Wave 26 – 31.10.2021	
	Wave 27 – 10.11.2021	
« ppipis	Wave 28 – 24.11.2021	
appinio	Wave 29 – 08.12.2021	

# Sample composition

### Age & Gender - All Surveys

