

The issues that matter...

a collation and summation
of existing research

June and July 2020



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During times of change and uncertainty, it's important to have an understanding on how consumers view the world - to offer context to our conversations, focus to our work and inform our decision-making on the issues that matter.

This report is a collation and summation of existing research that we've done through our work to help people to stay active during the pandemic. The research will range in sampling and methodologies, but in focusing on reputable sources of information, we hope to give a clear and accurate picture of the key consumer themes affecting life in England right now.

We've identified these three consumer themes as key factors influencing people's current relationships with physical activity (in terms of opportunities, attitudes, and behaviour):

- People who feel worried or anxious about contracting Covid-19
- People who have been disproportionately impacted financially by the pandemic
- People experiencing a greater burden of care due to Covid-19 pressures.

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Worry and anxiety

Throughout each week of July, almost 7 in 10 adults said they were very or somewhat worried about the effect that coronavirus (Covid-19) was having on their life now ¹.

And greater numbers of people have been feeling anxious compared to the end of June.

At the start of July, 2 in 10 adults (21%) said they'd feel comfortable eating indoors at a restaurant compared with 6 in 10 (60%) who said they'd feel uncomfortable.

By the end of July, 37% said they'd feel comfortable, but they were still outnumbered by those who said they'd feel uncomfortable (43%). ²

Meanwhile, at the end of June, just 15% of adults predicted they'd feel comfortable going to large public gatherings such as sports or music events (65% not comfortable) if measures were eased within the next month. ³

People also predicted feeling hesitant regarding a potential return to indoor gyms/leisure centres/swimming pools (more so than for other places), with 20% saying they'd feel comfortable, and 55% saying they'd not feel comfortable. ³

1. [ONS: Coronavirus and the social impacts on Great Britain \(Table 1\)](#)

2. [ONS: Coronavirus and the social impacts on Great Britain \(Table 23\)](#)

3. [ONS Horizon Scanning Special Report 10 Covid-19 Impact](#) (referencing [Ipsos Mori research](#))

2nd to 5th July saw the **largest increase in anxiety** since the end of March 2020. ¹

So what?

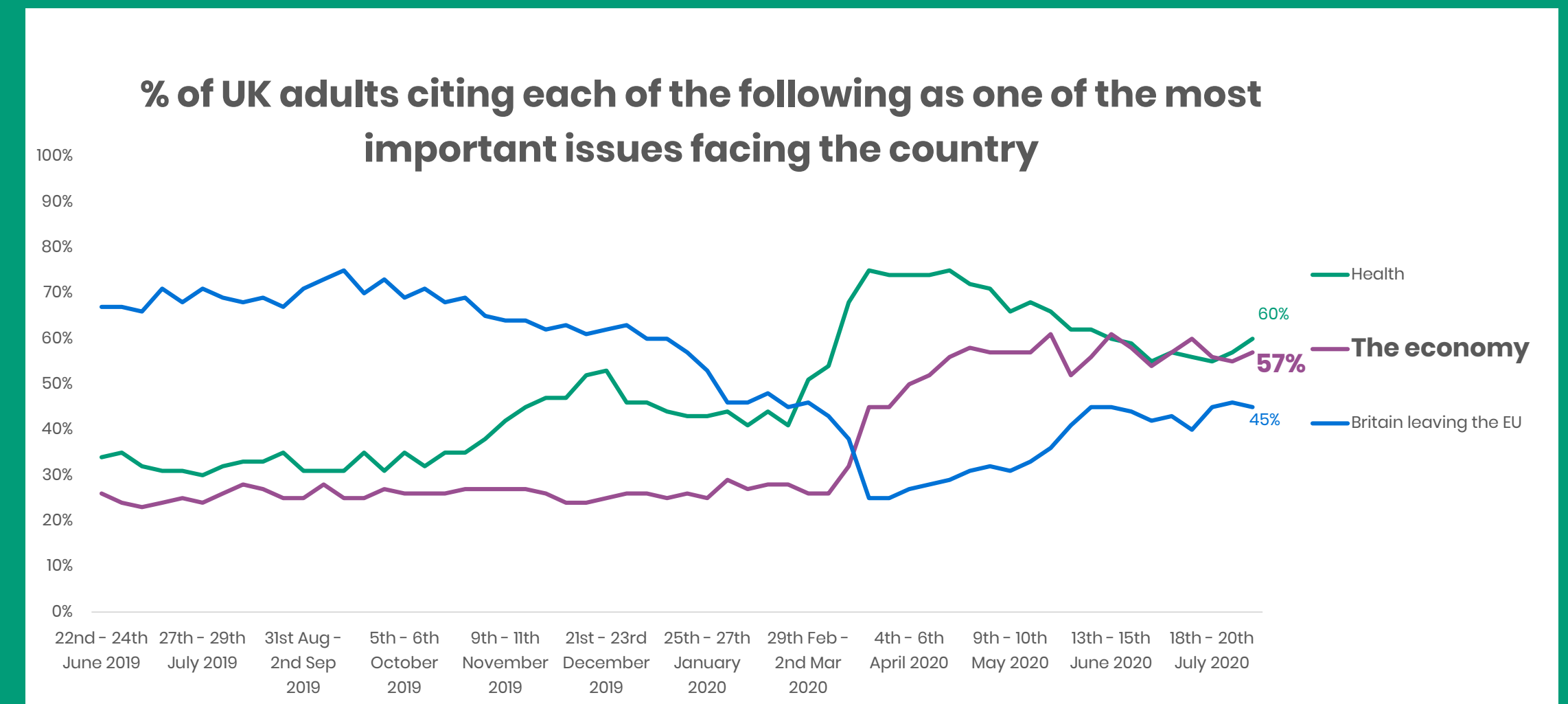
- There have been persistently high levels of worry since March, particularly among certain groups of people who may, therefore, take longer to return to physical activity.
- Local lockdowns and more countries placed on the 'quarantine list' may exacerbate that anxiety and reluctance to return.
- People are likely to require reassurance about their safety (cleanliness, social distancing measures, behaviour of other users).

Health has been deemed more important throughout the lockdown, but the economy has been gradually increasing in importance in May, June and July 2020¹.

Between 20-29 June, for the first time since lockdown there was parity between health and the economy, with 55% of the public picking out each as an important issue facing the country.

Britain leaving the EU has also been gradually rising in importance between April and July and is currently rated as the 3rd most important issue (45%).

This may be symptomatic of a growing number of people feeling ready to return 'to normal' – but this may exacerbate some people's fear for going outside, i.e. not trusting people to stick to social distancing.



So what?

- There may be tension between those who are ready to return 'to normal', and those who remain concerned about what such behaviour could mean for their own safety.
- And there may be confusion about what we are/are unable to do within guidelines, which could further contribute to anxiety.

1. [YouGov: The most important issues facing the country](#)

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Disproportionally affected financially

In the last three months the most viewed Citizens Advice pages were on coronavirus, employment, furlough, bills and benefits.

The most searched word per month were:

Month 1: Coronavirus

Month 2: Furlough

Month 3: Redundancy

Demand for redundancy advice is on the rise, making up four of the top 10 most viewed pages in month three of the pandemic¹.

Over half of businesses (51%) will have to make lay-offs within three months if the furlough scheme came to an end³.

And this in the context that we know people are being disproportionately affected financially by the current situation. For example, employees aged under 25 were around 2.5 times as likely to work in a sector which had been shut down, and low earners were seven times as likely as high earners to have worked in a sector which had now been shut down.⁴

1. [Citizens Advice: 3 months of a global pandemic.](#)
2. [Intel. The impact of Covid-19 on out of home leisure](#) (referencing [BoE Monetary Policy Report](#)).
3. [YouGov. Half of businesses would have to lay off staff within three months if furlough scheme ended.](#)
4. [Institute for Fiscal Studies: Sector Shutdowns during the coronavirus crisis: which workers are most exposed?](#)

It's predicted
that **unemployment**
could reach 8% by the
end of 2020.²

So what?

- People may have less disposable income and, if they've not already done so, could start making choices about what they do or don't spend money on.
- As a result, people may actively seek out low-cost/free activities, and we could see a reduction in paid-for memberships.

A quarter of adults (25%) said they were likely or very likely to go on holiday in the UK this summer. However, just under 1 in 10 adults (9%) said they were likely or very likely to go on holiday abroad this summer.¹

Their reasoning may relate to financial pressures, anxiety or other factors – but this may present opportunities around an increase in domestic holidays.

Furthermore, people in France, Spain, Italy and Germany are all more likely to oppose British tourists arriving this summer than they are tourists from other European countries.²

European countries tend to be most worried by American and Chinese tourists. American tourists are most opposed in all countries surveyed (except Sweden, where they come second to Chinese tourists).²

1. [ONS Horizon Scanning Special Report 10 Covid-19 Impact](#) (referencing [ONS research table 22](#))
2. [YouGov: Stay away, Europeans tell British tourists](#)

People are reluctant to travel abroad this summer. **No foreign country was considered a possible holiday destination by more than 21% of people.**²

So what?

- This may present an opportunity to emphasise connecting with nature and being active as a family/with friends while in the UK.
- We have potential to highlight things to do (tied into our partners) such as walking, running, cycling and active play in particular.

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Greater burden of care

We know from previous research that, on average, women were taking on more hours of childcare than men at the start of lockdown.^{2,3}

While homeschooling hours appear to have been more evenly divided between men and women: between 3 April and 10 May, of parents who were homeschooling, women (34%) were more likely than men (20%) to agree that it was negatively affecting their wellbeing.⁴

And parents appear to have been fitting their work around childcare obligations, with data showing they were more likely to work in the morning and at night.³

As time goes on, more parents are comfortable sending their children back to school: 49% were in this bracket in July, compared to 33% in May.⁵

Many parents of disabled children were managing without support (such as short breaks) prior to lockdown (62%). But of those that had received support, by May the majority (76%) had seen that support cease.¹

1. [Disabled Children's Partnership: LeftInLockdown - Parent carers' experiences of lockdown](#)
2. [Cambridge-INET Institute: Inequality In The Impact Of The Coronavirus Shock](#)
3. [ONS: Parenting in lockdown: Coronavirus and the effects on work-life balance](#)
4. [ONS: Coronavirus and homeschooling in Great Britain](#)
5. [DfE: Increase in parents feeling confident about sending children back to school](#)

72% of parent carers of disabled children are providing a lot more care compared with the amount before lockdown.¹

So what?

- With the wellbeing of carers negatively affected by the situation, some may lack the motivation or opportunity to get active.
- For some, the resumption of schooling/support may present more time to engage in physical activity, however we're likely to find some services such, as breakfast and after school clubs, may not return immediately.

Thank you for reading.