

COVID-19 Consumer Impact Report
w/c 18.01.21

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 93 weeks, surveyed over 27,000 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 236 respondents in the UK between Friday 15th January to Sunday 17th January 2021.

Summary: Lockdown is continuing to impact the mood and behaviours of the nation, with low levels of happiness and people seeking new lockdown activities

- 01** Despite uplifts in happiness (+1ppt) and optimism (+1ppt) and a decline in anxiety (-2ppts), **the mood of the nation remains considerably lower than January 2020**
 - 02** **Ahead of 'Blue Monday' more people were feeling the pinch financially**, with a 9ppt drop in the percentage of people feeling financially secure and a 3ppt increase in reporting that money is tight, amidst rising levels of redundancies and increased concern over job security
 - 03** **The rollout of COVID-19 vaccinations has aided in improving confidence in the government**, which has increased by 3ppts this week, but criticism remains that they have acted too slowly in their responses to the COVID-19 pandemic
 - 04** Fewer people are undertaking leisure activities and **44% of people are actively looking for activities to do during lockdown**
 - 05** **News surrounding the continued rollout of COVID-19 vaccinations is making more people optimistic of returning to previous activities**, with 6 in 10 people feeling optimistic (+5ppts from 04/01/2021)
 - 06** **Fewer people are currently comfortable returning to previous activities**, such as socialising with friends (-14ppts), going to a café (-15ppts) or booking a UK holiday (-11ppts), **than in early December**
-



**Life satisfaction,
optimism & consumer
confidence**



There has been a considerable increase in life satisfaction and happiness and optimism levels have marginally increased after a dip post-Christmas but remain low



Happiness levels remain low at 30% but show a 1ppt increase from 4th Jan.



20% of people are now feeling optimistic about Britain's future, a 1ppt increase from last week.

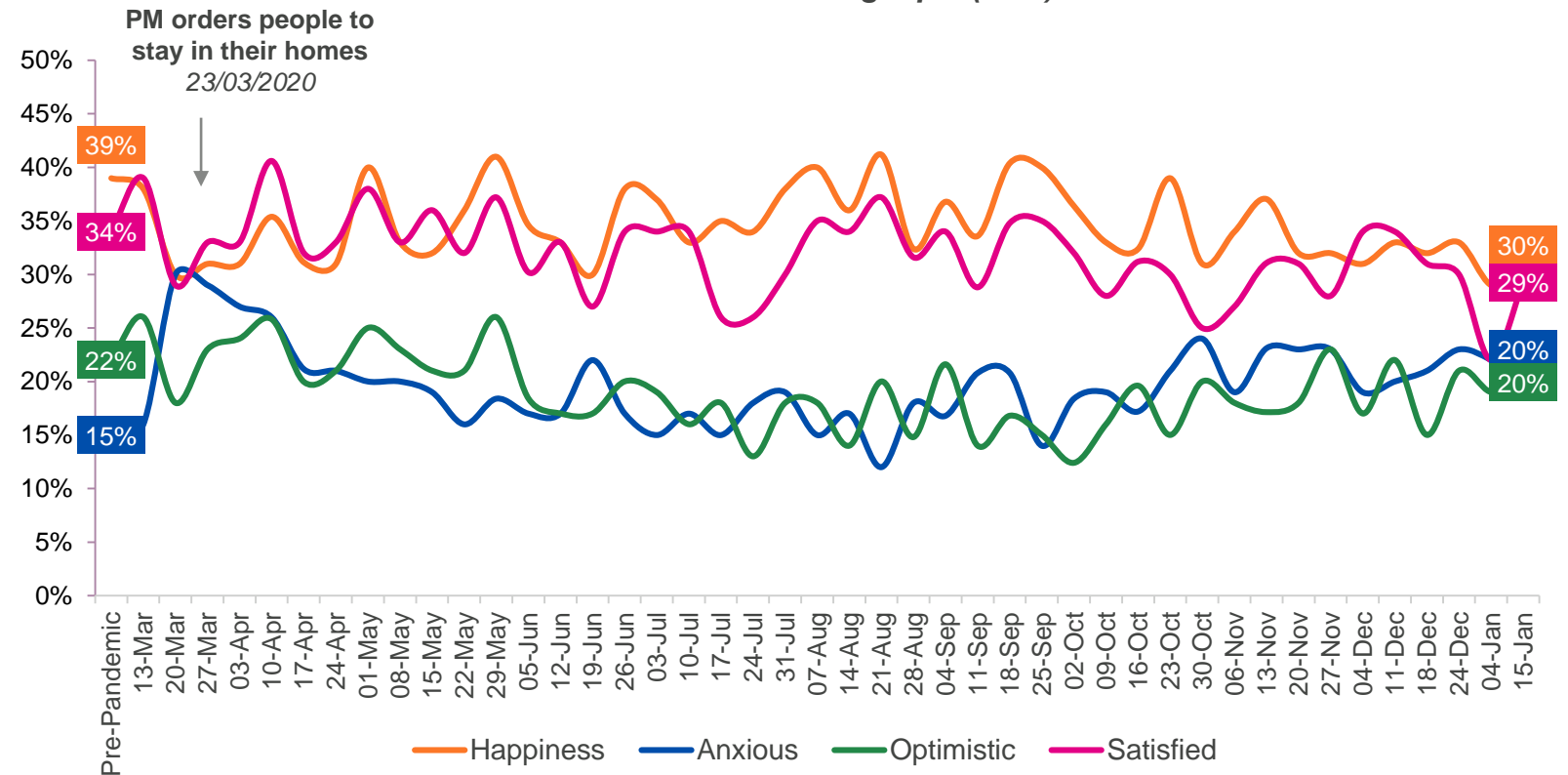


Life satisfaction has recovered from a dip last week, increasing 7ppts to 29%, but remains 5ppts lower than pre-pandemic levels.



Anxiety levels have continued to decline this week, dropping from 22% to 20%.

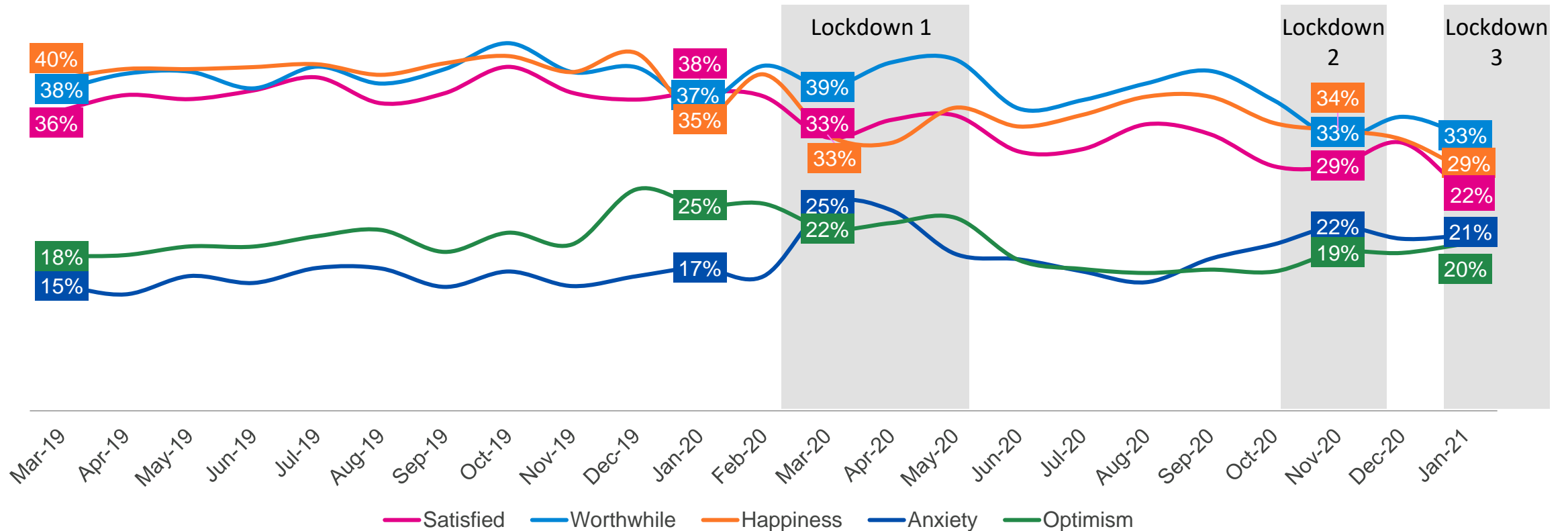
Overall, how Happy/ Anxious/ Optimistic did you feel yesterday?
(0=Not at all, 10=Completely)
% selecting top 3 (8-10)





Life satisfaction has seen the biggest drop since January 2020, with 16ppt fewer people currently feeling satisfied with their life


The mood of the nation over time






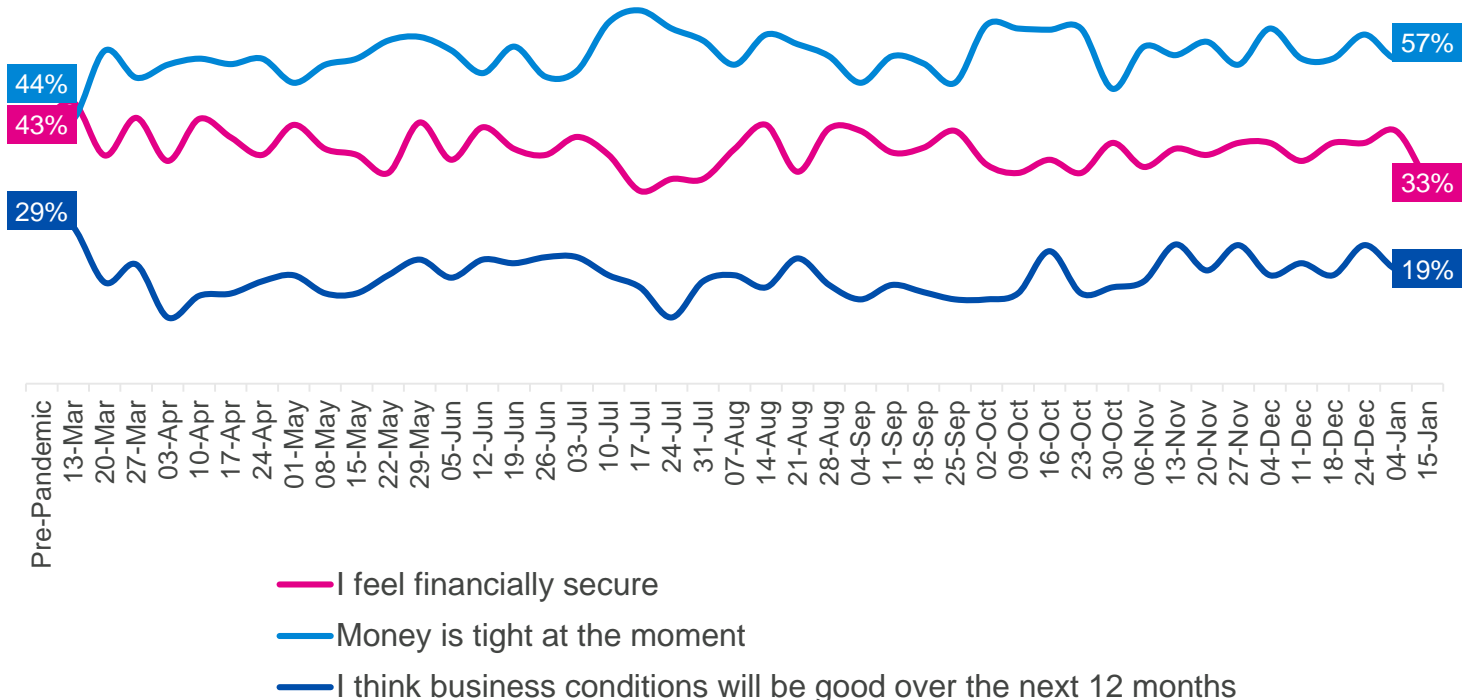
Financial security has experienced a considerable dip in the weekend before ‘Blue Monday’ and is at the lowest level since July 2020

To what extent do you agree with the following statements?
(0=Not at all, 10=Completely)
% selecting top 3 (8-10)

 The percent of people feeling financially secure has decreased 9ppts from 42% to 33%

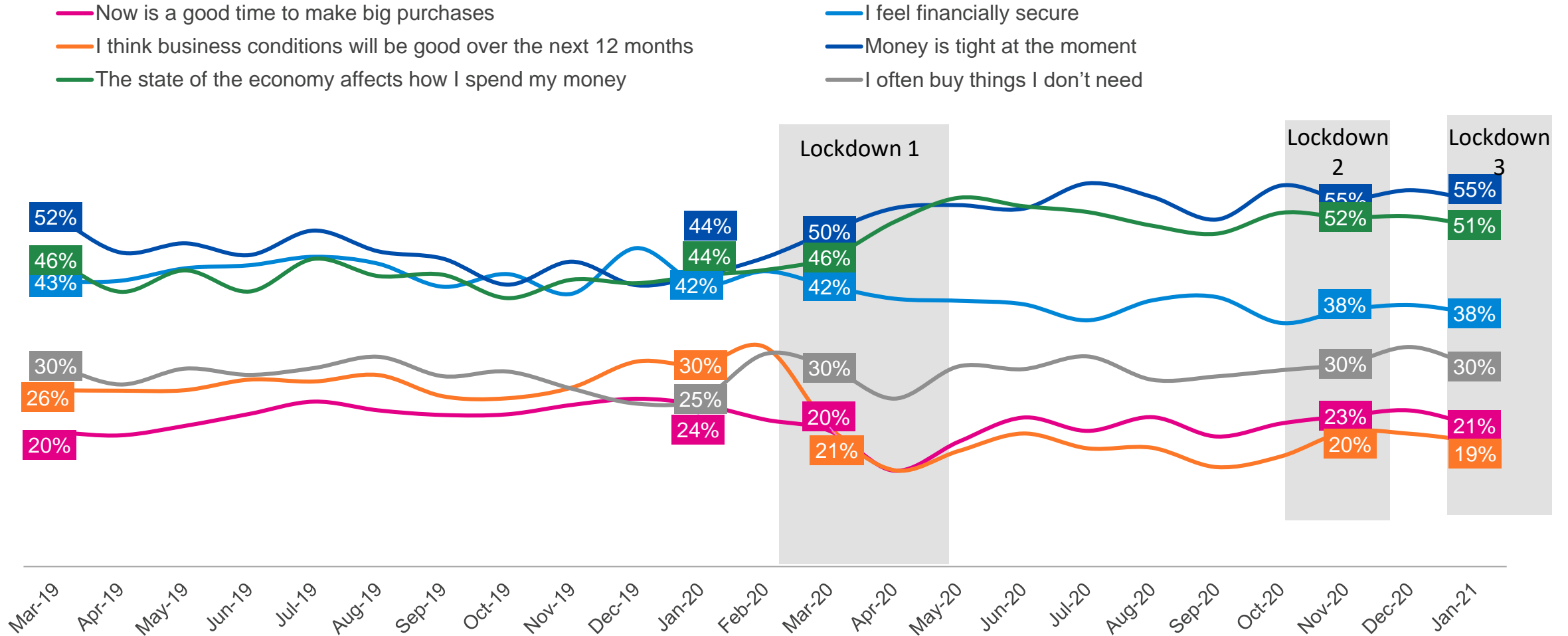
 There has been a 3ppt increase in the percentage of people reporting that money is tight, from 54% to 57%

 Confidence in future business conditions remained low this week at 19%



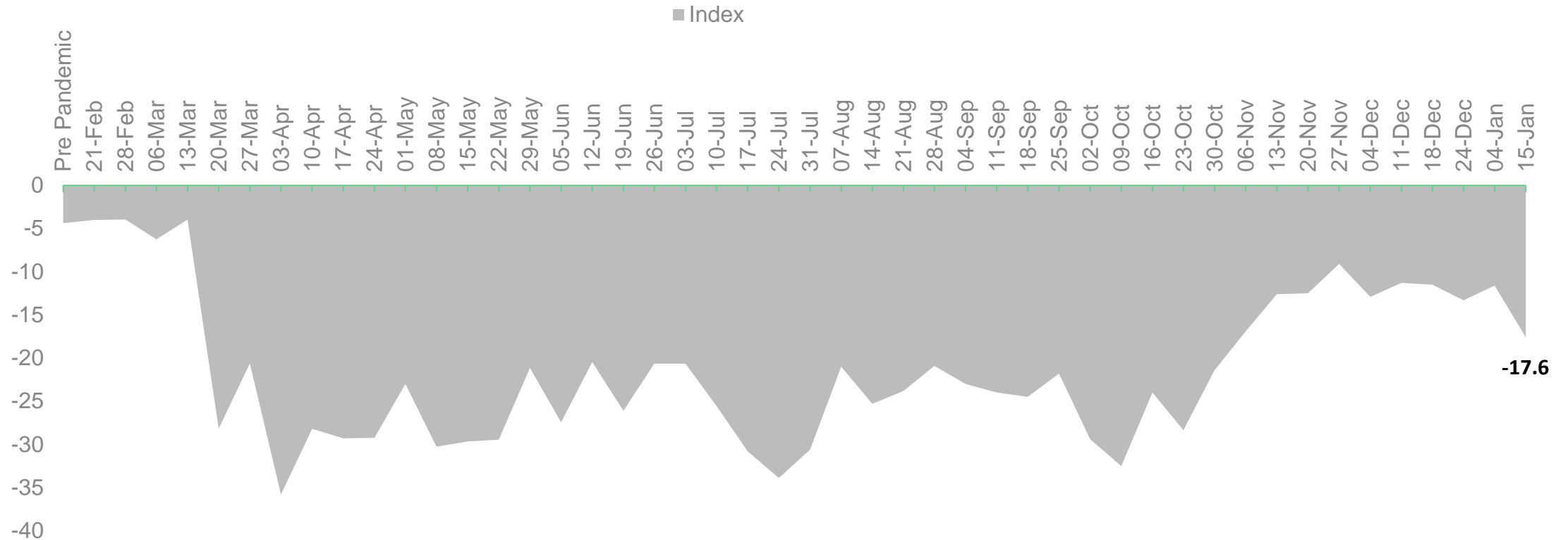


Financial and economic concerns remain more heightened than at the start of 2020 – having not recovered from changes in Lockdown 1





Consumer Confidence has dipped to the lowest point since October 2020



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.*



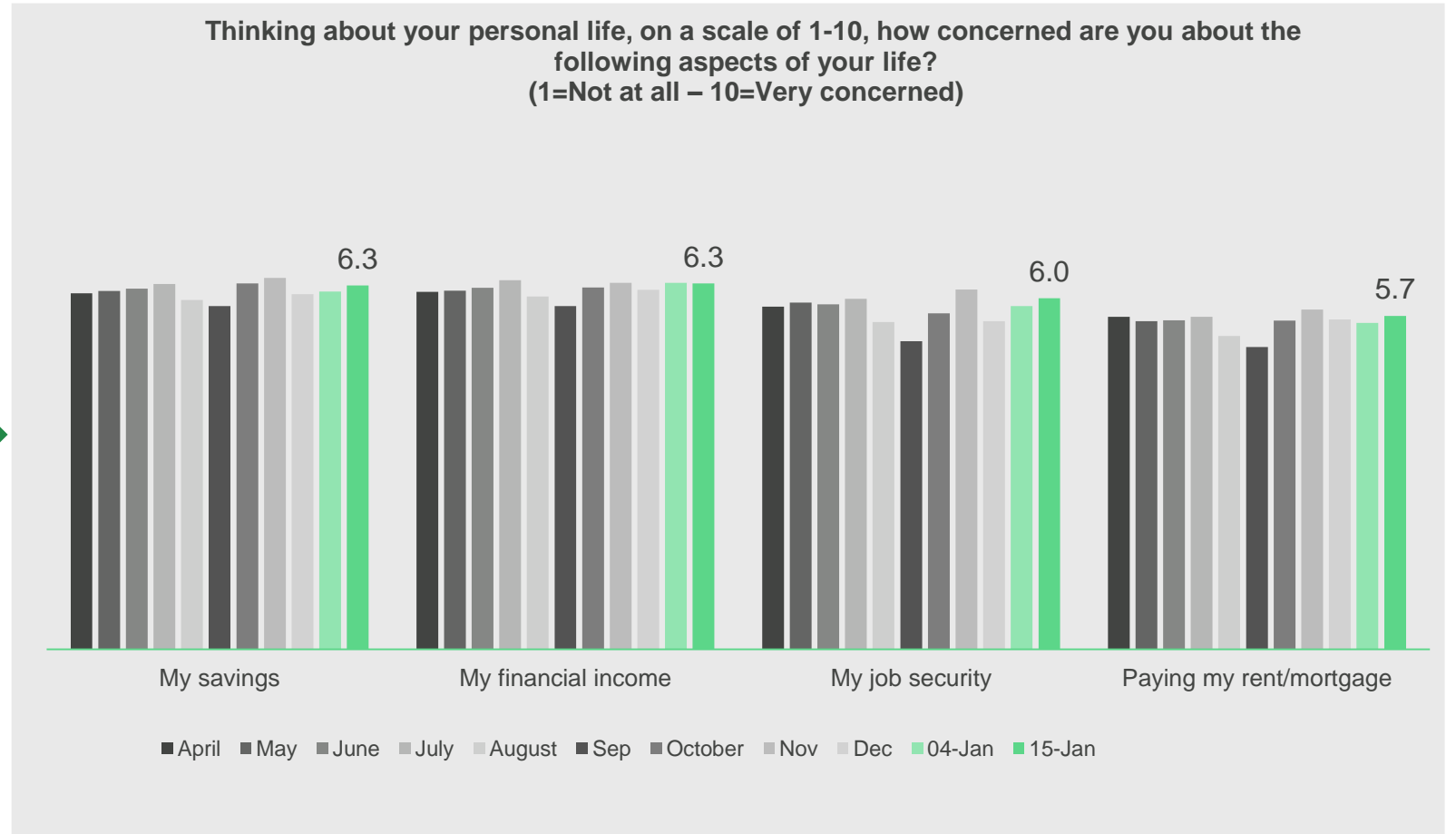
Financial concerns have continued to rise this week after lower levels of concern in Decemeber

19% of households have someone that has been **furloughed**

3% of households contain someone that has had their **salary reduced** since the COVID-19 outbreak

6% of households include someone that has **been made redundant** since the COVID-19 outbreak began

71% say that **their employer has been supportive** during the COVID-19 outbreak

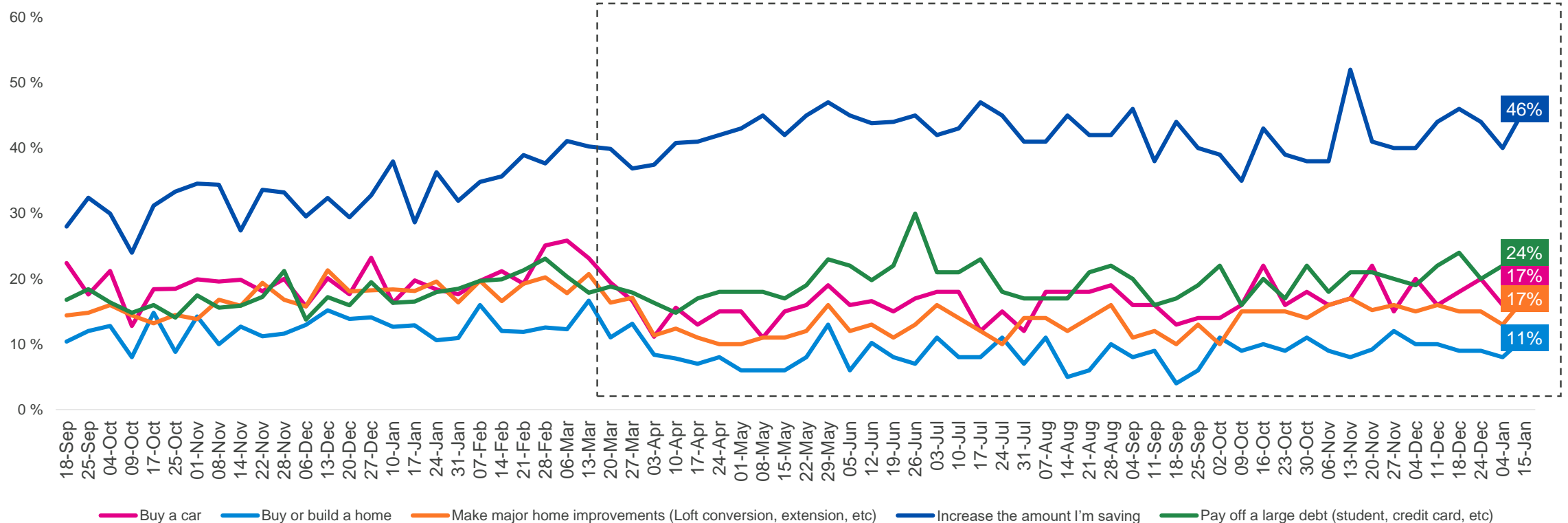




Intent to increase savings is significantly higher than in January 2020 and likelihood to make a large financial action have all increased this week

Intent to increase savings is 17ppts higher than 17th Jan 2020

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, 27/11:265, 4/12:250, 11/12:250, 18/12: 250, 24/12: 250, 04/01: 250, 15/01: 236.

Confidence in Government & Broad Concerns



Confidence in the government is up 3ppts, driven by the vaccination roll-out, however criticisms remain over the timings of policies and restrictions

The vaccination roll-out has boosted confidence in the government’s response for some:

“Seem to be heading in right direction with vaccine.”

“I think they have done a good job in the circumstances. The vaccine roll-out appears to be going well.”

“The government is trying to arrange the Covid vaccines under considerable pressure”

“They appear to be doing well with the vaccination roll out.”

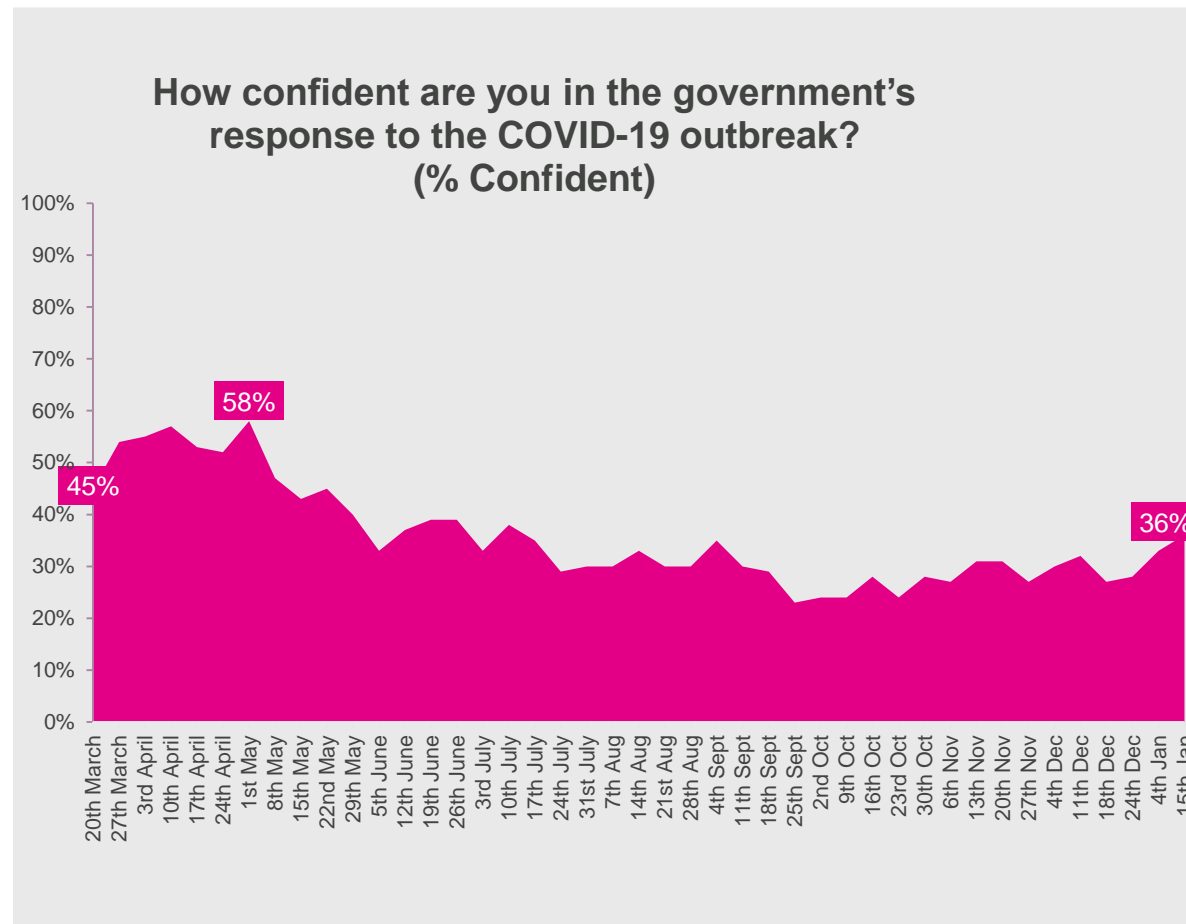
However, there is still a lot of criticism regarding their “too little too late” handling of the pandemic

“I feel like they have left it too late to bring in certain implications like people travelling getting tested before they fly now but it wasn’t in place for nearly a year, they’ve had a slow response to the pandemic and how they’ve dealt with vulnerable children in need of school meals while schools are closed is disgusting.”

“The government are always step behind the virus and very reactive as opposed to proactive I have no faith.”

“They have dithered a lot on big decisions causing the situation to escalate.”

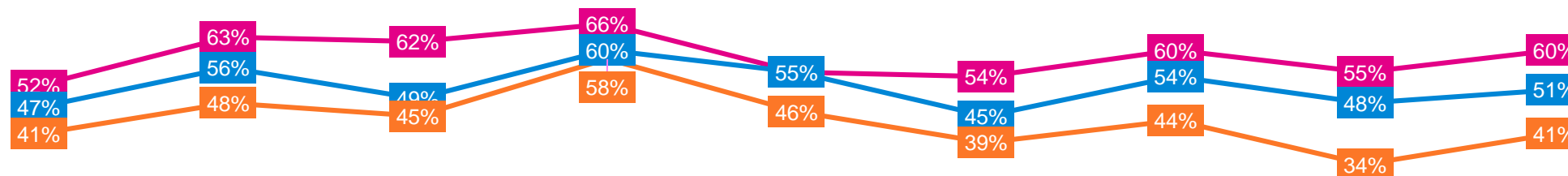
“Because the situation is getting worse. Government too slow in reacting early last year..”





Optimism of being able to do activities and go on UK & abroad holidays has jumped this week as news of the vaccination roll-out continues to dominate

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



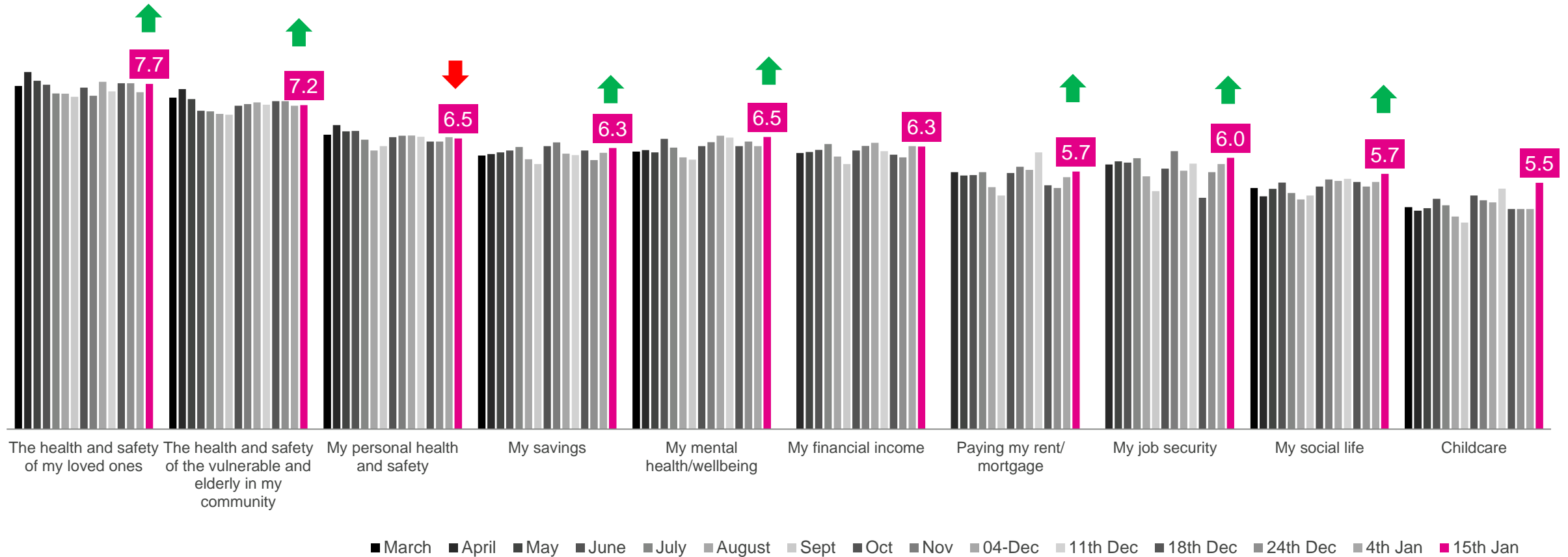
13th Nov 20th Nov 27th Nov 4th Dec 11th Dec 18th Dec 24th Dec 4th Jan 15th Jan

— Returning to activities that I stopped/delayed because of COVID-19 — Being able to go on holidays in the UK — Being able to go on holidays abroad



Despite increased confidence in the gov and optimism, concerns across personal aspects of peoples lives have seen increases this week

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)

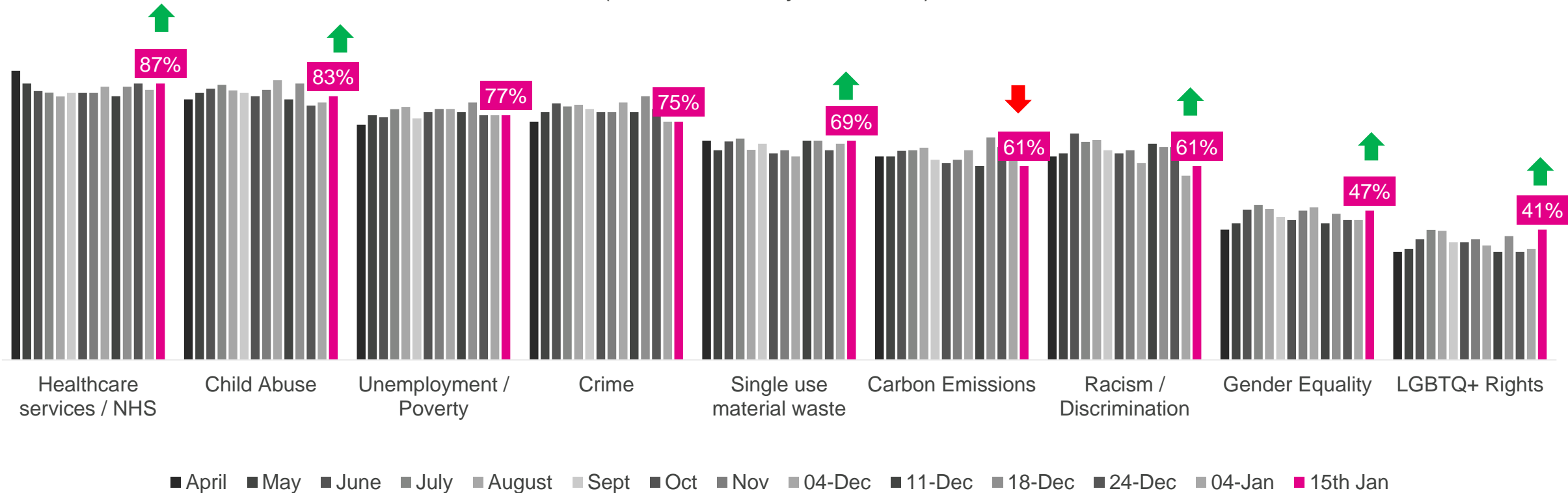


Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 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, 27/11:265, 4/12:250, 11/12:250, 18/12: 250, 24/12: 250, 04/01: 250, 15/01:236



The nation's main concern coming into the New Year continues to be the Healthcare services and NHS, increasing 3ppts this week

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, 27/11:265, 4/12:250, 11/12:250, 18/12: 250, 24/12: 250, 04/01: 250, 15/01:236



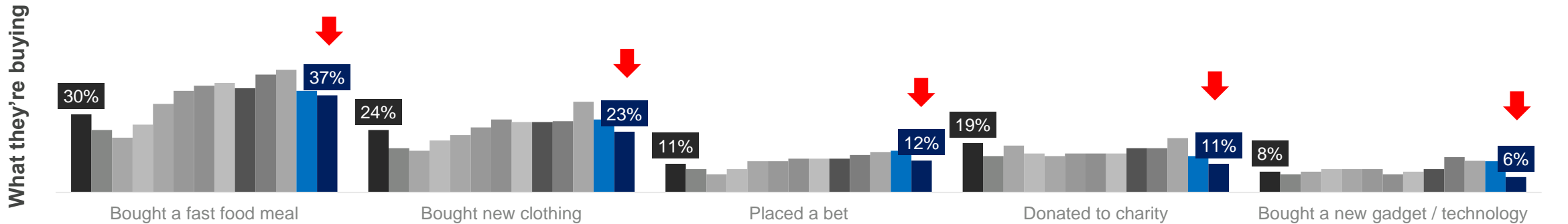
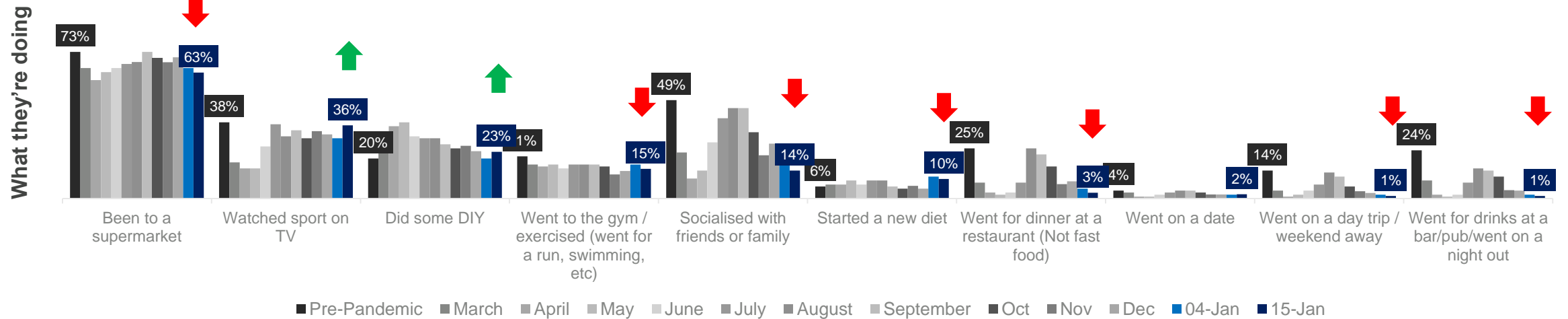
Changes in Behaviour



Doing DIY and watching sport on TV were the only activities to increase this week, with most activities being done by fewer people

7ppt fewer people have made a charitable contribution compared to 10th Jan 2020

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

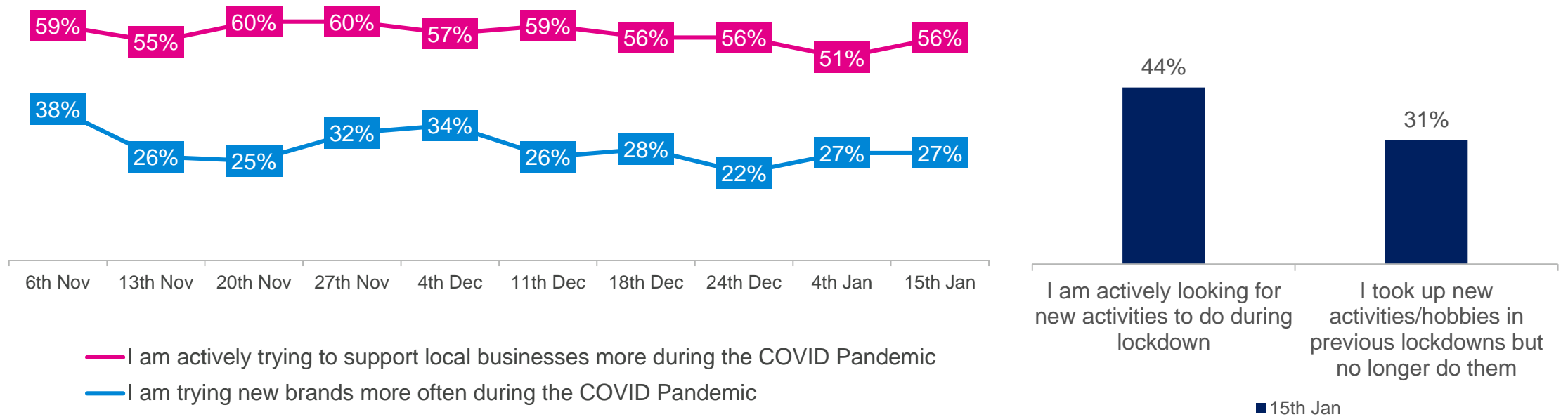


Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 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, 27/11:265, 4/12:250, 11/12:250, 18/12: 250, 24/12: 250, 04/01: 250, 15/01: 236.



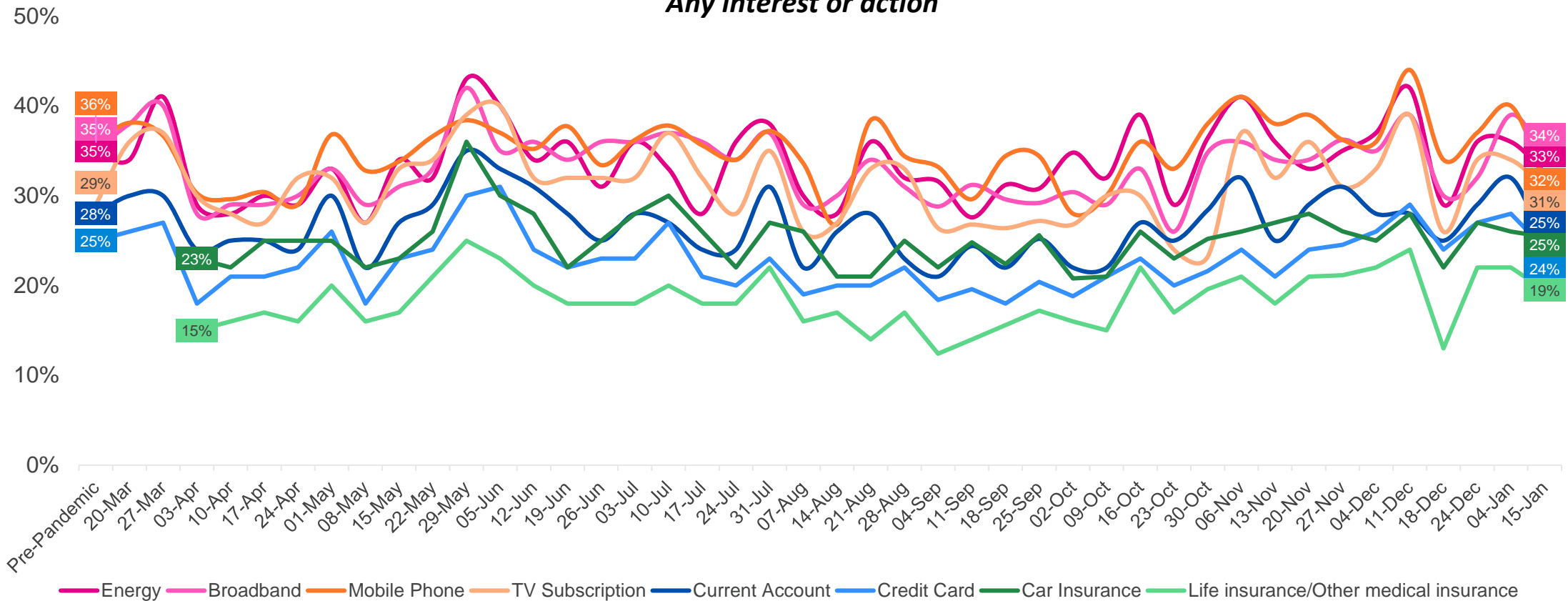
44% of people are looking for new activities to do during lockdown and almost 1/3 of people took up new hobbies in previous lockdowns that they no longer do

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



Interest in switching subscriptions or services has decreased for all categories tracked this week

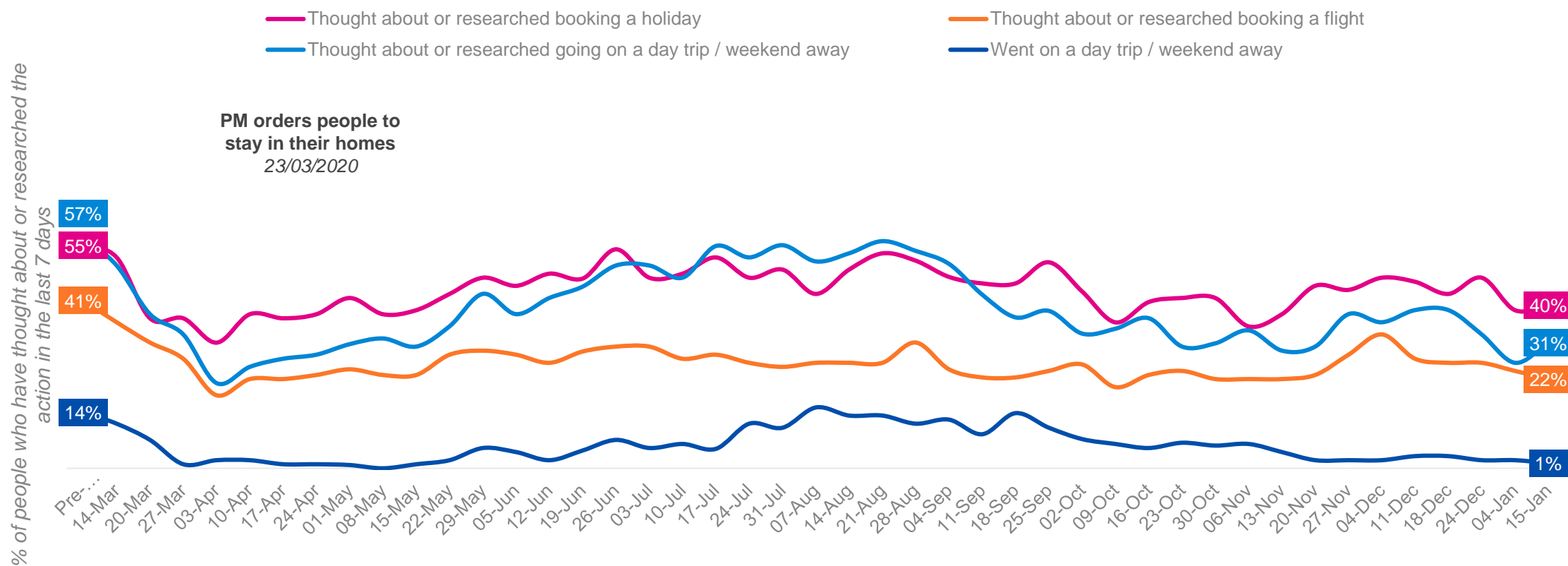
Have you talked about, researched, bought any of the following in the past 4 weeks?
Any interest or action





Interest in day trips/weekends away have increased for the first time since the introduction of Tier 4 in December

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

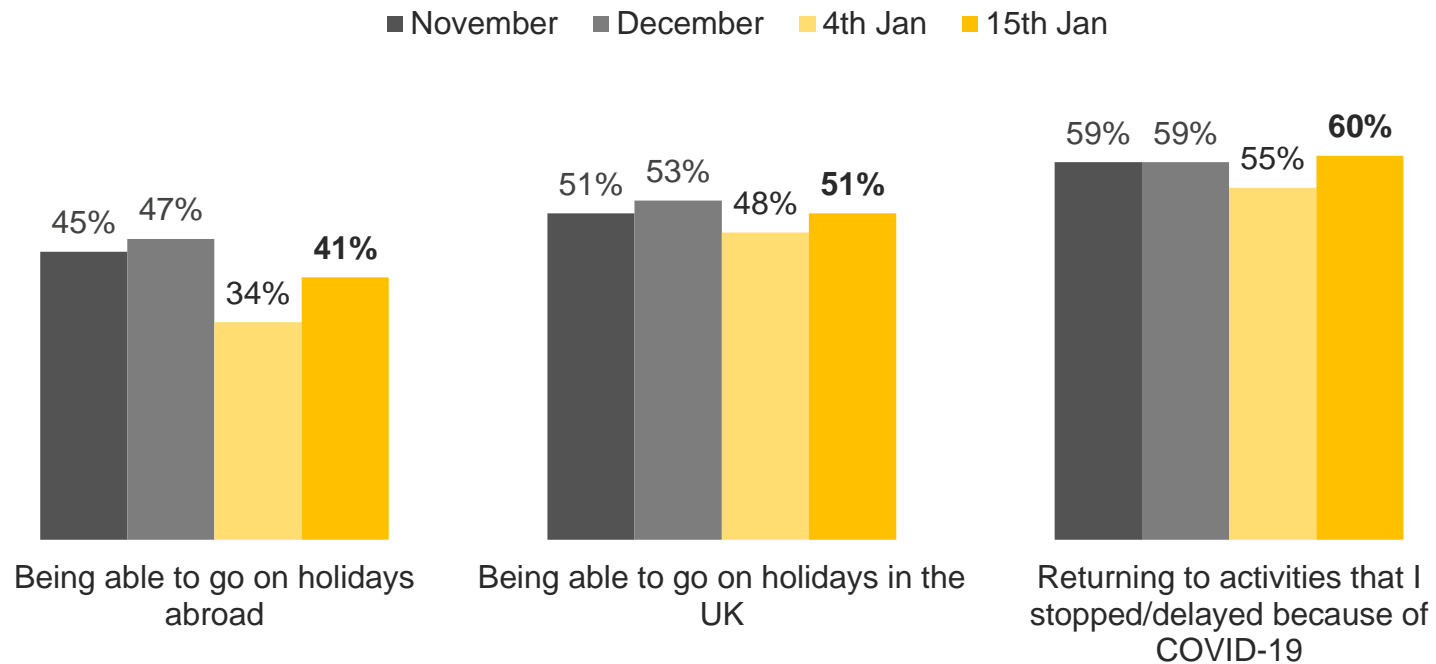




Looking ahead

Optimism for future travel plans and returning to past activities have increased this week amidst increasing roll out of vaccinations

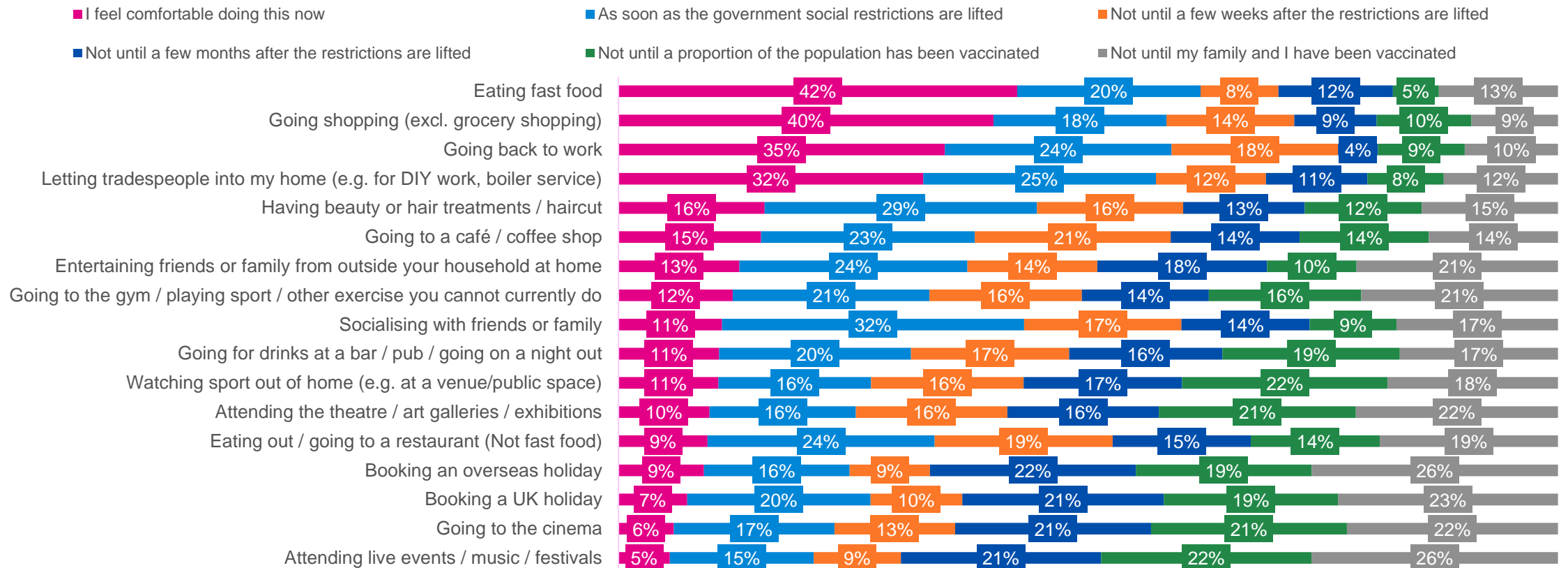
The news around a potential vaccine for COVID-19 in 2021 has made me optimistic about...



There have been declines in the percentage of people who feel comfortable doing all activities since December

There have been significant declines in the percentage of people who feel comfortable getting a haircut (-22ppts), going to a café/coffee shop (-15ppts), socialising with friends (-14ppts), going to the gym/doing exercise you cannot currently do (-13ppts) or booking a UK holiday (-11ppts)

When would you feel comfortable doing the following again?

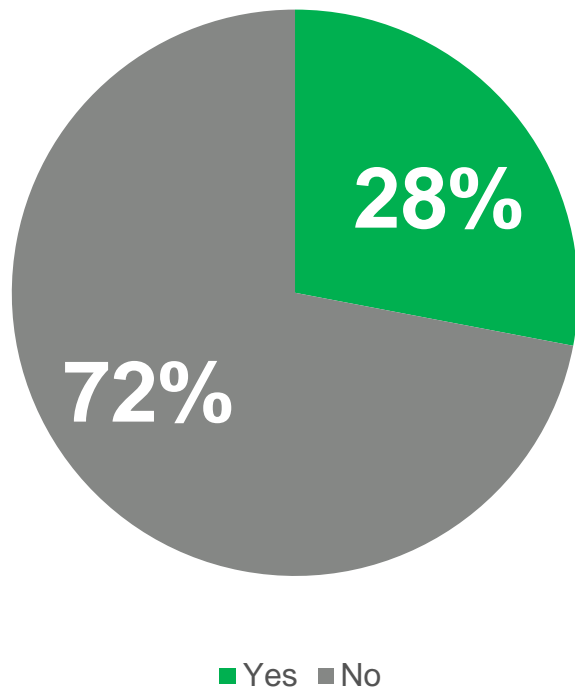




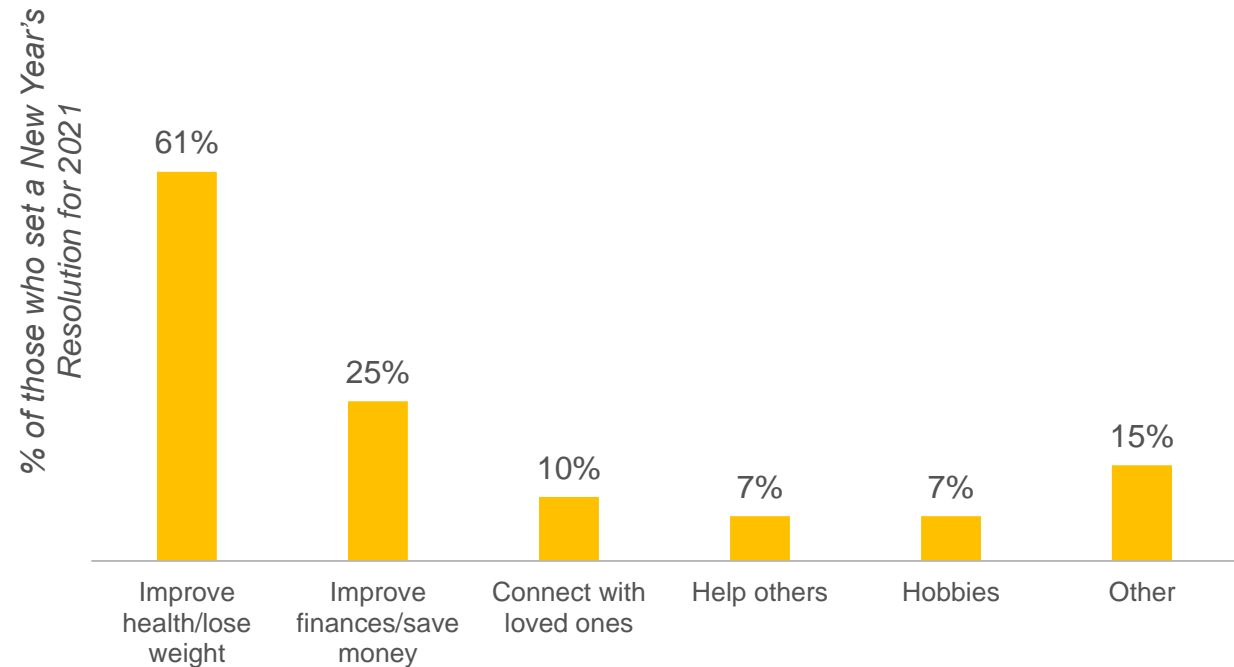
Improving health/losing weight is the most common New Year's Resolution, followed by improving financial situations

1 in 10 people with a New Year's Resolution intend to connect more with their loved ones as their resolution

Have you set yourself any New Year's Resolutions for 2021?



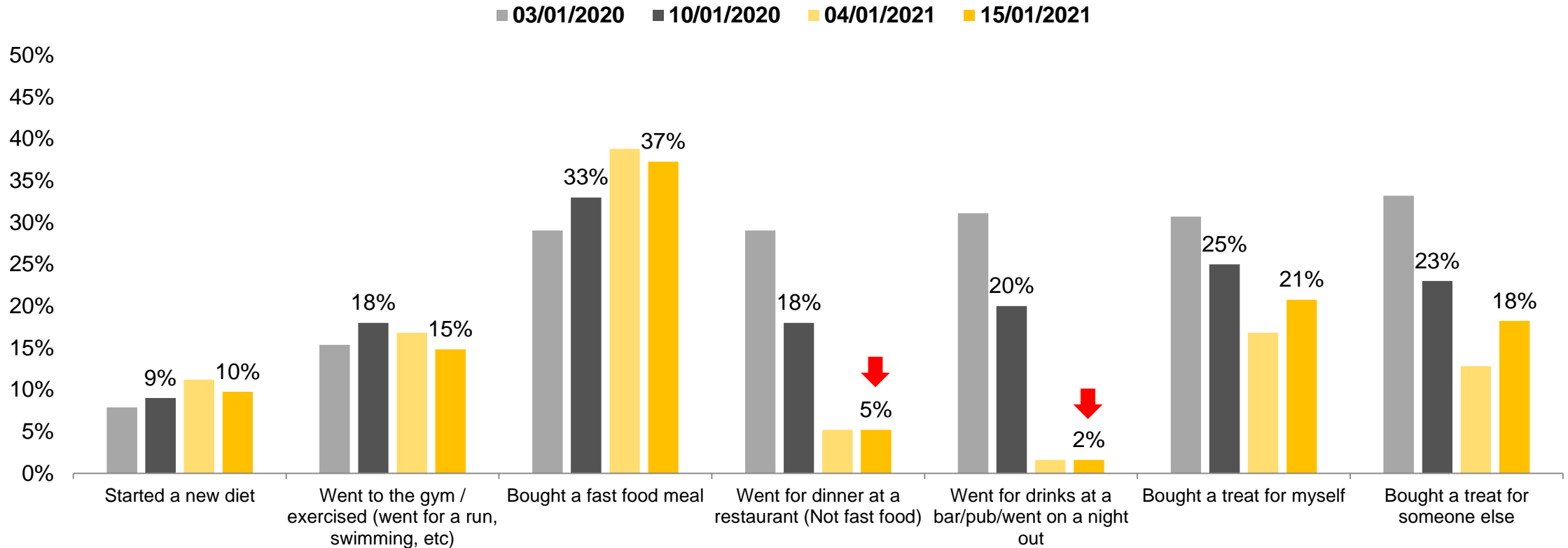
You said that you have you set yourself any New Year's Resolutions for 2021. Can you tell us what they are?



Exercise has declined this week and is lower than the second week of 2020 and treating yourself and others remains lower than 2020

Going out for dinner and going out for drinks remain significantly lower than in 2020 due to the closure of venues/restaurants as a result of government COVID guidelines

Which of the below, if any, have you done or have happened to you in the last 7 days?

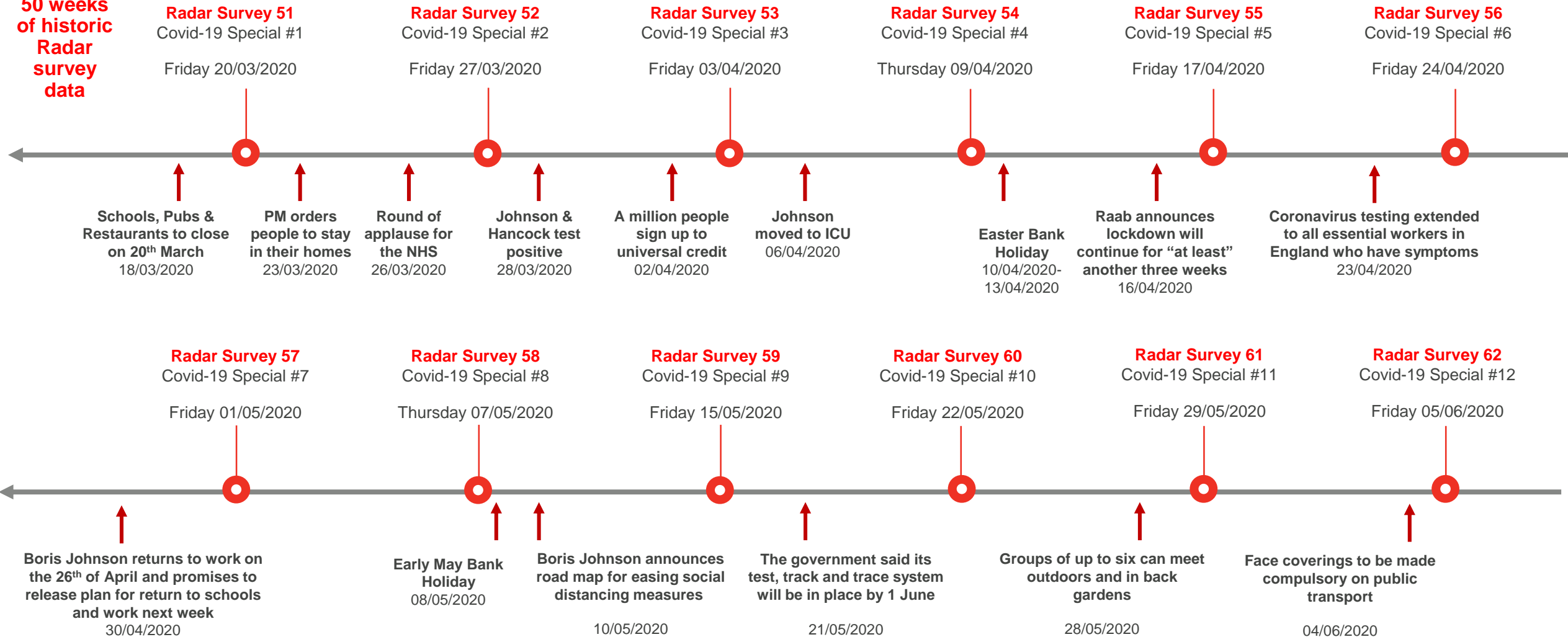


Appendix



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

Government announces
revised restrictions on
social gatherings –
limiting to 6 people

Revised government
restrictions on social
gatherings come into
place

PM warns UK to
follow COVID
restrictions or risk
second lockdown

Chancellor of the
Exchequer
announces Winter
Economy Plan

Extended local
lockdown
measures in the
North East

Boris to announce
tiered approach to
lockdown
measures

01/09/2020

09/09/2020

14/09/2020

22/09/2020

24/09/2020

01/10/2020

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

Greater Manchester and
areas in the Midlands move
to Tier 3

PM announces month-
long national lockdown
to commence 05/11/2020

National lockdown in
England begins

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

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

15/10/2020

20/10/1010-23/10/2020

31/10/2020

05/11/2020

09/11/2020

18/11/2020



Survey Timeline

86 weeks
of historic
Radar
survey
data

Radar Survey 87
Covid-19 Special #37
Friday 27/11/2020



Black Friday
27/11/2020

Radar Survey 88
Covid-19 Special #38
Friday 04/12/2020



**First NHS patient
receives COVID-19
vaccination**
08/12/2020

Radar Survey 89
Covid-19 Special #39
Friday 11/12/2020



**Self-isolation
period
reduced from
14 to 10 days**
11/12/2020

Radar Survey 90
Covid-19 Special #40
Friday 18/12/2020



**London, South
Essex, and South
Hertfordshire move
to Tier 3**
16/12/2020

Radar Survey 91
Covid-19 Special #41
Thursday 24/12/2020



**Boris announces a
stricter Christmas,
with the introduction
of Tier 4**
19/12/2020

Radar Survey 92
Covid-19 Special #42
Monday 04/01/2021



**National Lockdown
introduced in England**
**AstroZeneca / Oxford
University Vaccine roll
out starts**
04/01/2021

Radar Survey 93
Covid-19 Special #43
Friday 15/01/2021



**PM announces
temporary close of all
UK travel corridors**
15/01/2021

