

COVID-19 Consumer Impact Report
w/c 12.04.21

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 105 weeks, surveyed over 30,000 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 250 respondents in the UK between Friday 9th April to Sunday 11th April 2021.



Summary: Despite a drop in happiness following the bank holiday, consumer confidence is up this week and the nations outlook is positive ahead of Step 2 on the road out of lockdown

- 01 Following the uplift in the nation's mood over the bank holiday weekend, **happiness levels have dropped back down this week**; but optimism continues to show positive momentum and **life satisfaction is at the highest point since April 2020**
 - 02 The nation's financial outlook is considerably more positive than 12 months ago, with increased optimism and **financial security at the highest point since the pandemic began**
 - 03 **Socialising is on the rise**, with positive momentum in the percentage of people that feel comfortable socialising with friends or family (+16ppts since Jan 2021) and **half of the nation having met up with up to six people** since the easing of lockdown on 29th March
 - 04 **6 in 10** of those surveyed have **received at least one COVID-19 vaccination dose** but news surrounding possible side effects, such as blood clots, continues to drive uncertainty
 - 05 There was a **last-minute surge in booking hair or beauty treatments/haircuts** ahead of the reopening of salons and barbers
 - 06 Ahead of the reopening of non-essential retail, **almost half of the population said that they feel comfortable going shopping** but only **15% feel comfortable returning to the pub** (unchanged since March 2021)
-



**Life satisfaction,
optimism & consumer
confidence**



Happiness levels dropped following the bank holiday weekend, but optimism continues to show positive momentum and life satisfaction is at the highest point since the same time 12 months ago

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

- ↓
Happiness levels dropped by 5ppts after the Bank Holiday weekend, decreasing from 40% to 35%
- ↑
Optimism continues its upward momentum, after a dip at the end of March, increasing from 24% to 30% in the last 7 days
- ↑
Satisfaction levels have increased by 4ppts this week from 36% to 40%
- ↓
Anxiety levels have decreased 1ppt from 17% to 16%



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, 22/01:250, 29/01:250, 05/02:250, 12/02: 250, 19/02:252, 26/02:250, 05/03:250, 12/03:250, 19/03:250, 26/03:250, 01/04:250, 09/04:250.



The nation's financial outlook is considerably more positive than 12 months ago, with increased optimism and financial security at the highest point since the pandemic began

Optimism for business is 20ppts higher than 12 months ago after a 4ppt uplift this week and financial security is currently 6ppts higher than pre-pandemic levels, increasing 1ppt this week

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



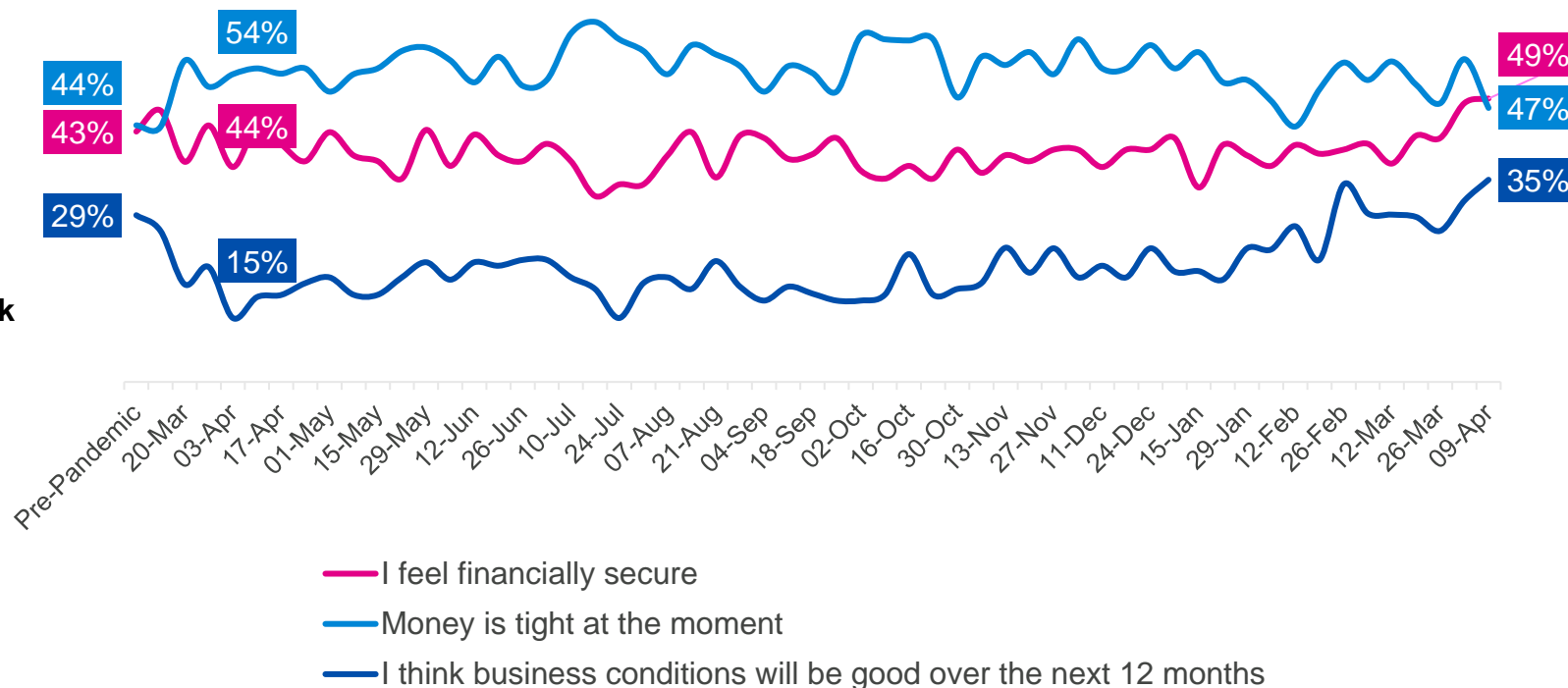
The percentage of people feeling financially secure has increased by 1ppt this week from 48% to 49%, the highest level since the pandemic began



There has been a 9ppt decline in the percentage of people stating that money is tight at the moment, dropping from 56% to 47% this week, after a sharp increase last week



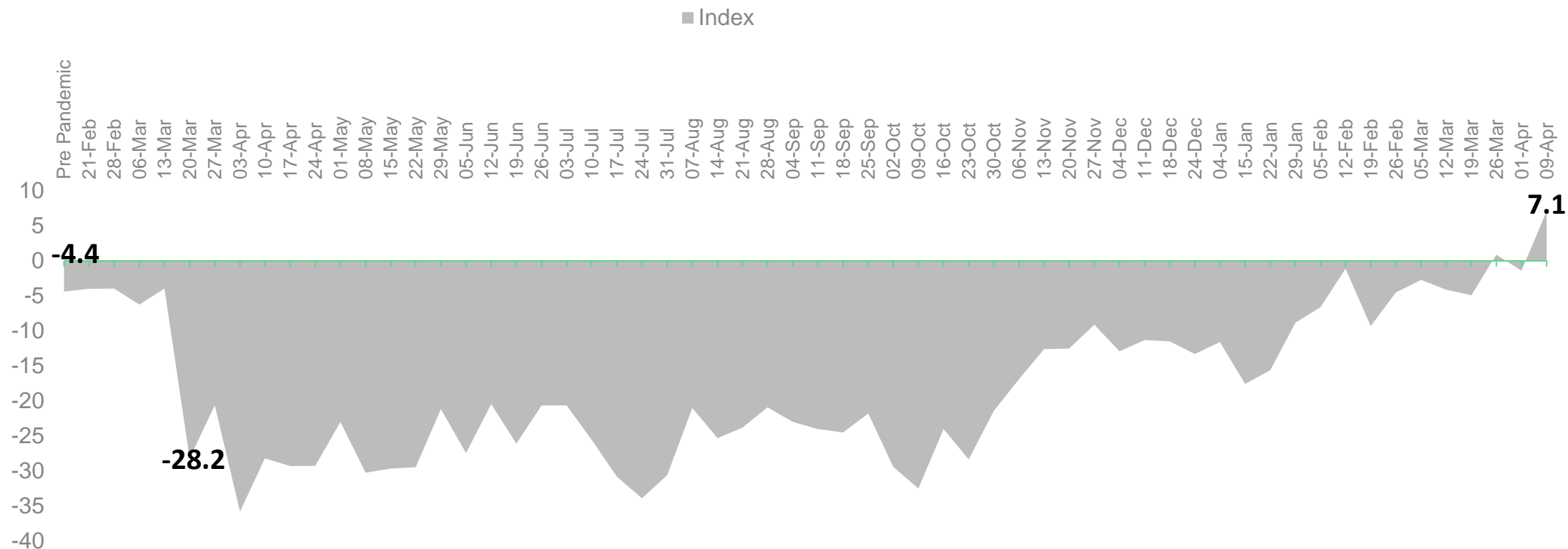
Confidence in future business conditions has continues to increase, rising from 31% to 35% in the last week



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, 22/01:250, 29/01:250, 05/02: 250, 12/02: 250, 19/02: 252, 26/02:250, 05/03:250, 12/03: 250, 19/03:250, 26/03:250, 01/04: 250, 09/04:250.



Consumer confidence has increased in the last 7 days, from -1.4 to 7.1



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.



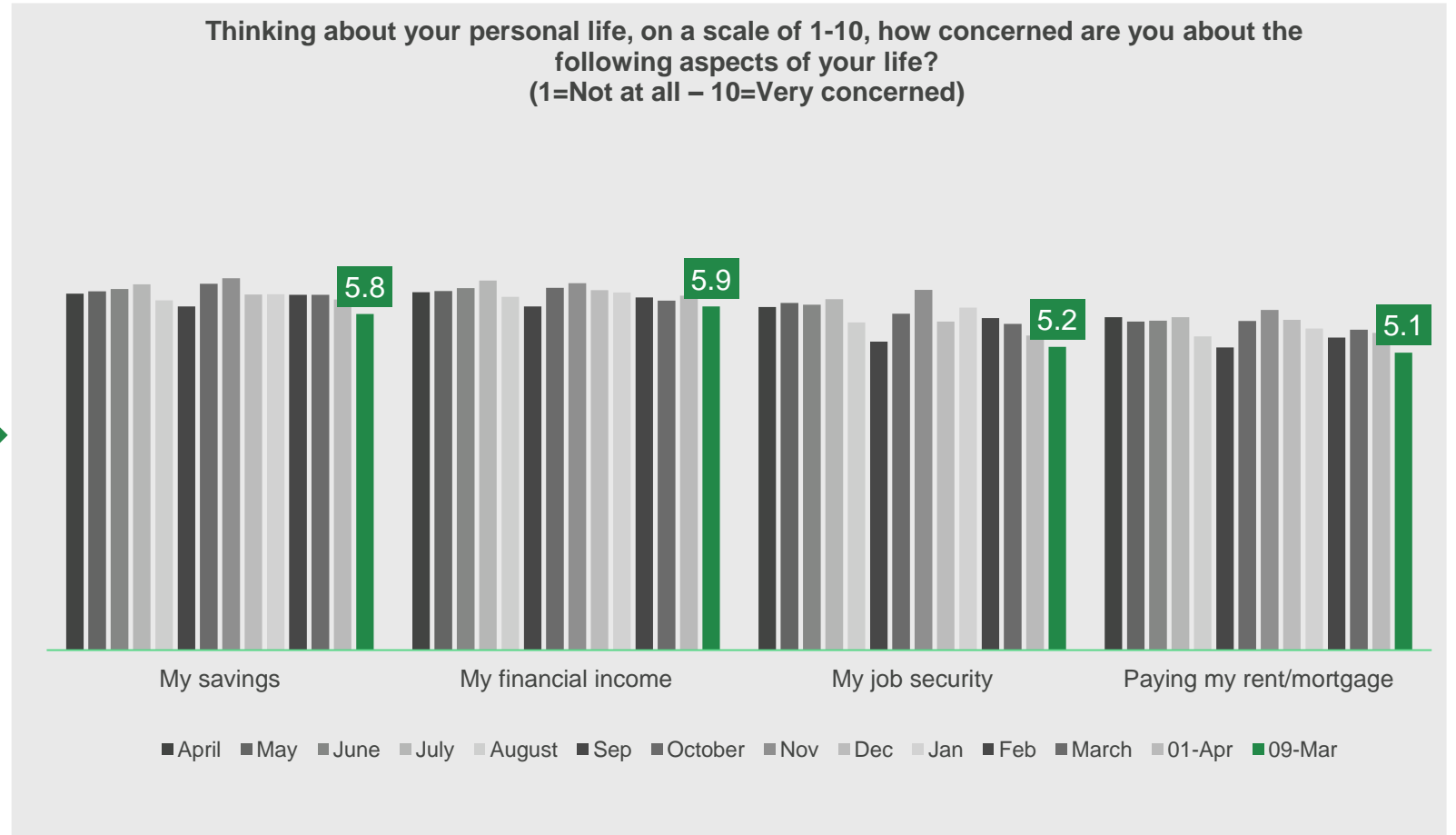
After increases in the past fortnight, concerns over personal finances such as savings and paying rent/mortgage have decreased this week

15% of households have someone that has been **furloughed**

6% of households contain someone that has had their **salary reduced** since the COVID-19 outbreak

8% of households include someone that has **been made redundant** since the COVID-19 outbreak began

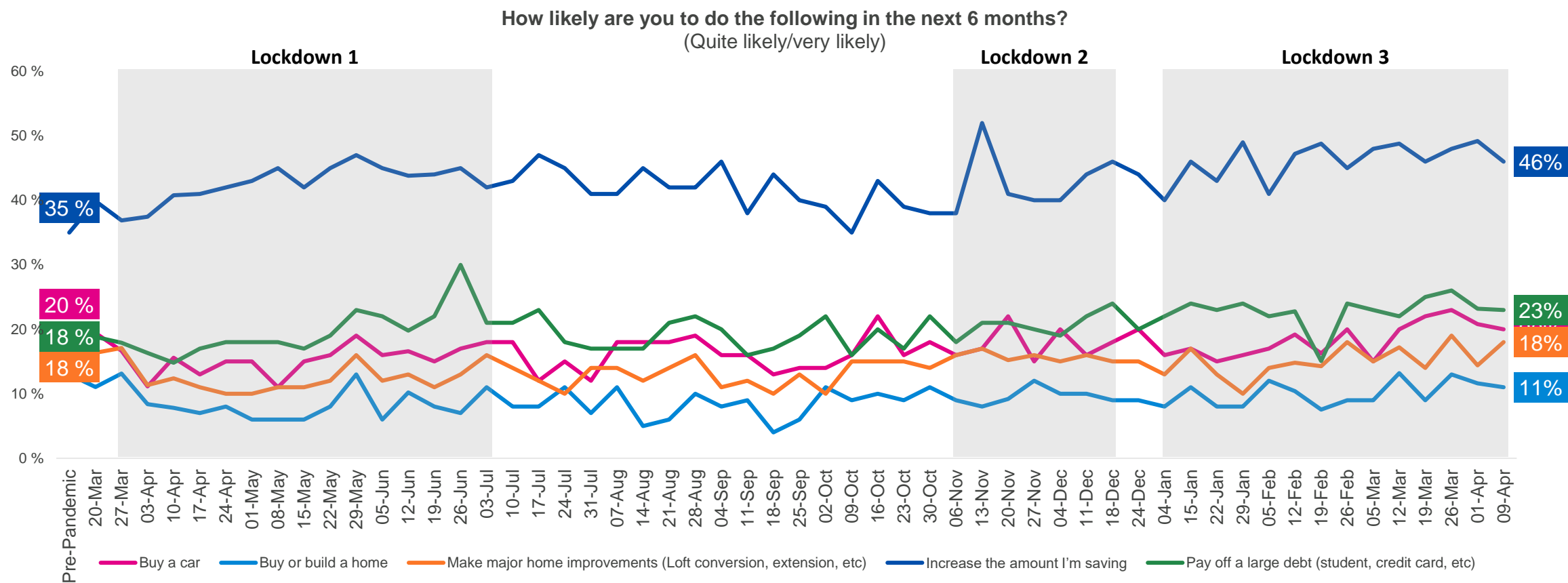
70% say that their employer has been **supportive** during the COVID-19 outbreak





Intent to make major home improvements has increased 4ppts this week, as intent to increase saving has declined for the first time in 2 weeks

Aside from intent to make major home improvement, this week we saw declines in intent to spend or invest money in each of the other areas asked about.



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, 22/01:250, 29/01:250, 05/02:250, 12/02: 250, 19/02:252, 26/02:250, 05/03: 250, 12/03:250, 01/04:250, 09/04:250

Confidence in Government & Broad Concerns



Confidence in the government has decreased this week as people remain critical of the slow response from the start of the pandemic

People are still quick to criticise the government for their late response throughout the pandemic:

“I’m scared of virus coming back.”

“They were slow to take action last year and are now continually changing the rules”

“The have always seemed slow to react, causing the actions needed to be longer and more severe than of they had responded promptly”

“Many of the decisions have been muddled and delayed or partially implemented leading to increased virus infections. Accepting that even the scientists got things wrong it was not an easy position to solve ”

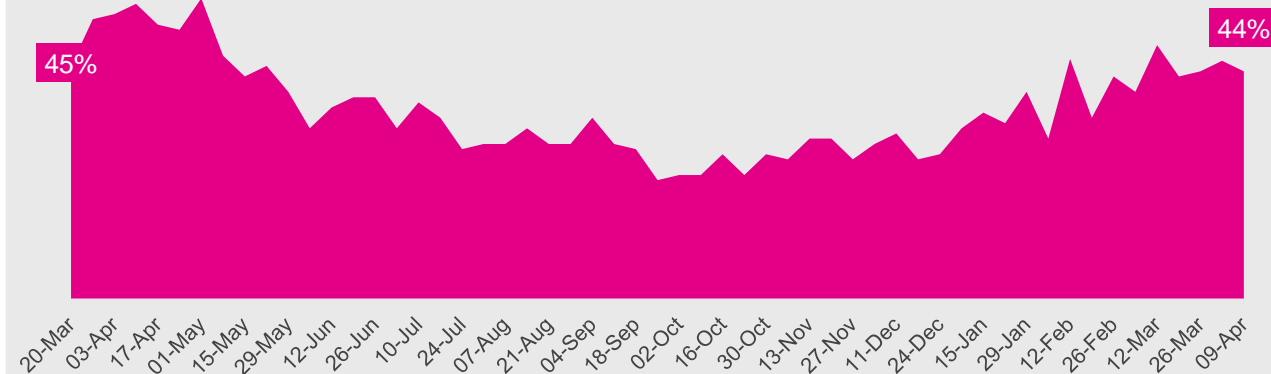
While the successful vaccination roll-out continues to be the main source of praise:

“They had the insight to get on and order vaccines from all over the world to prevent people from dying or being seriously in in hospitals that were already struggling.”

“Paying upfront for vaccines has saved thousands of lives and will get the economy going again..”

“I think they were not quick enough to lockdown the country. They have somewhat redeemed themselves by our excellent vaccine programme.”

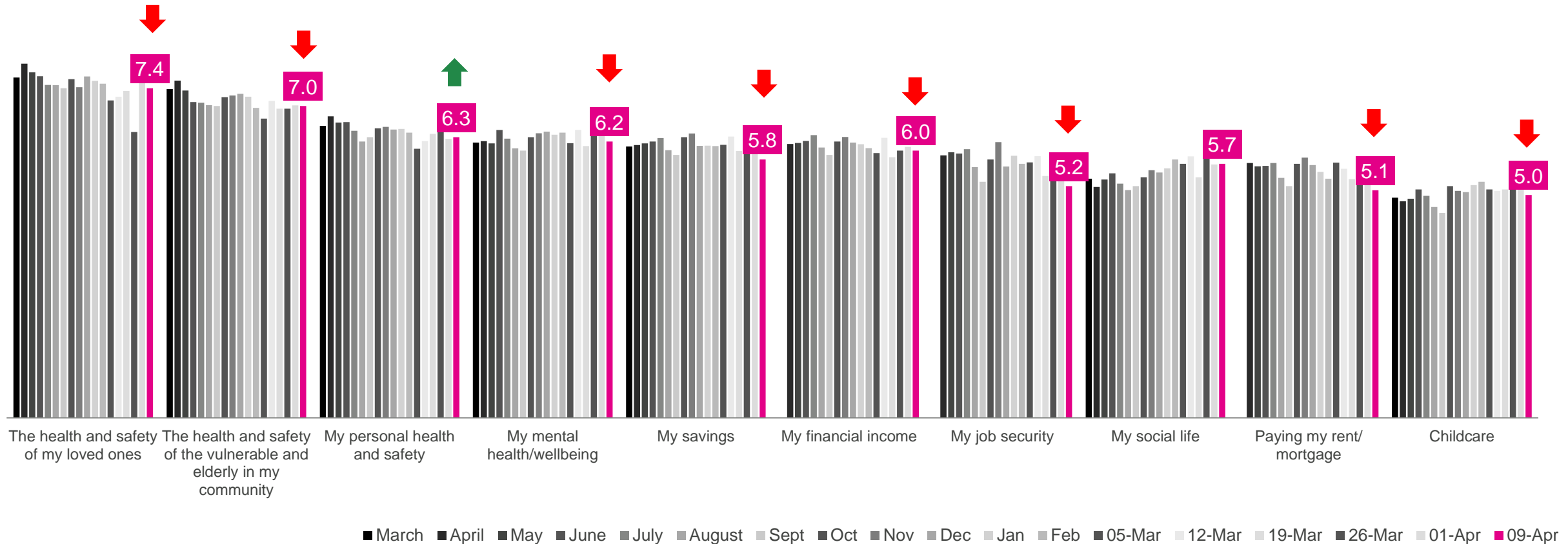
How confident are you in the government’s response to the COVID-19 outbreak?
(% Confident)





The majority of personal concerns have decreased this week, with the exception of mental health/wellbeing

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)



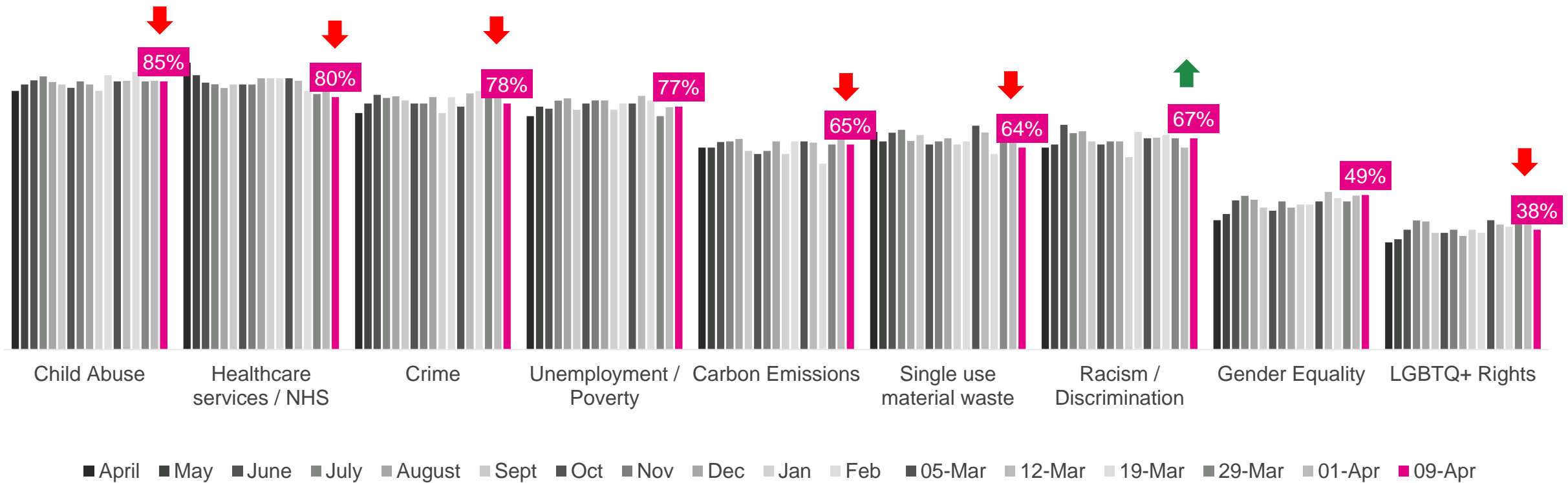
Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 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, 22/01:250, 29/01:250, 05/02:250, 12/02: 250, 19/02:252, 26/02:250, 05/03:250, 12/03:250, 19/03:250, 26/03:250, 01/04:250, 09/04:250



Concerns over racism/discrimination have increased this week, as concerns for all other societal issues have decreased

After a spike in concern over crime two weeks ago (85%) concern has now dropped 7ppts to 78%

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, 22/01:250, 29/01:250, 05/02:250, 12/02:250, 19/02:252, 26/02:250, 05/03:250, 12/03:250, 19/03:250, 29/03:250, 01/04:250, 09/04:250

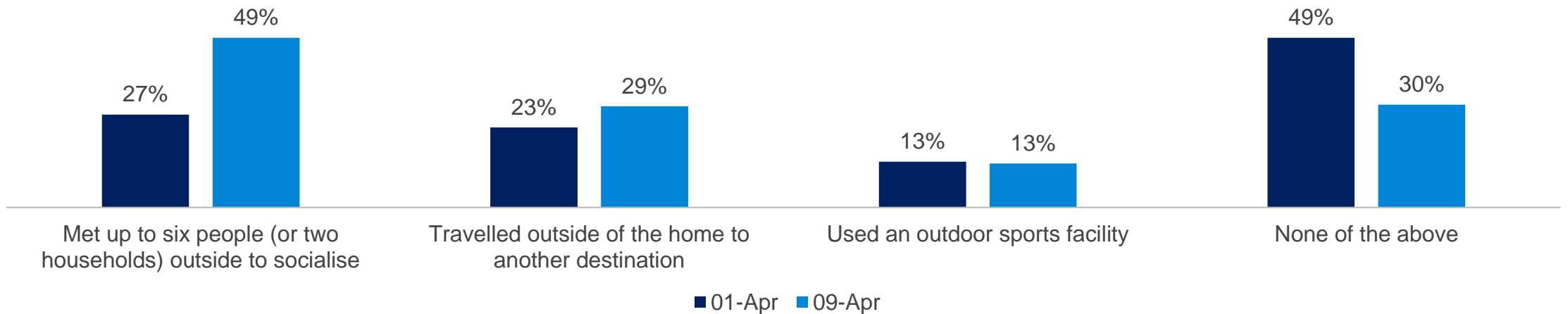


Changes in Behaviour

Since the easing of lockdown on 29th March, half of the nation have met up with six people and over a quarter have travelled

The national lockdown in England ended on Monday 29th March, now allowing groups of 6 or two households to meet outside, outdoor sports facilities to open, and a relaxation of the "stay at home at all times" message.

Since then, which of the following hav

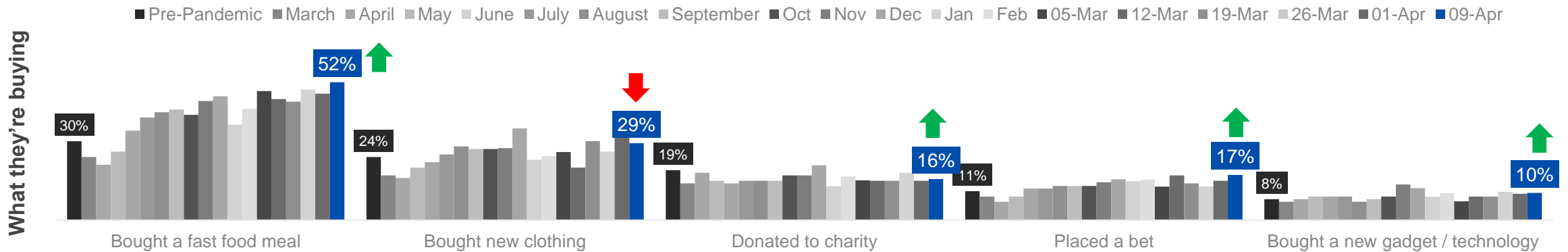
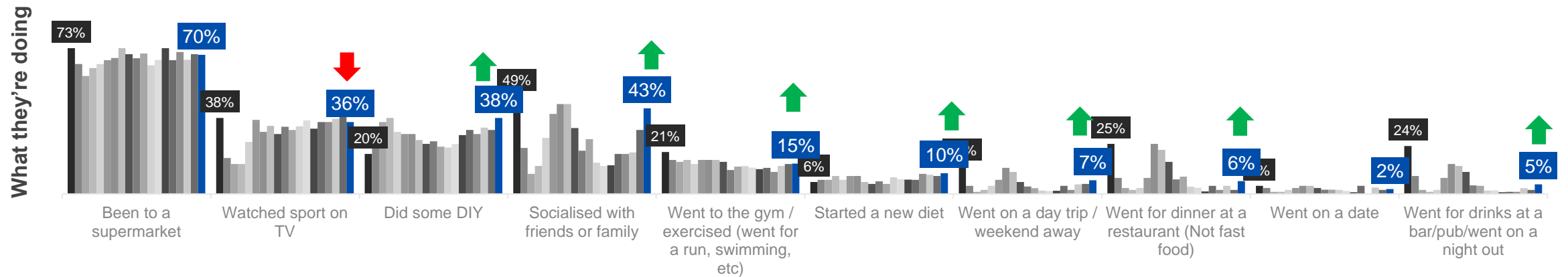




As the lockdown restrictions ease, we see increases in those meeting friends and family

The percentage of people socialising with their friends or family this week has shot up from 32% to 43%, mirroring similar levels to September.

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

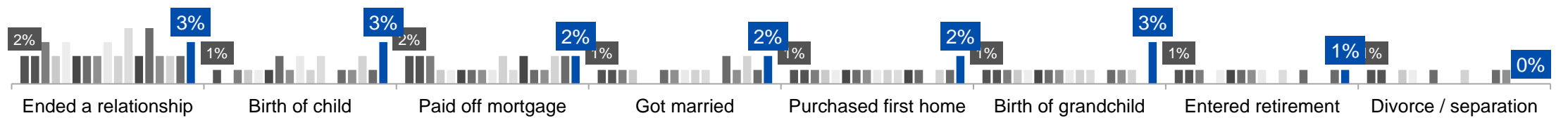
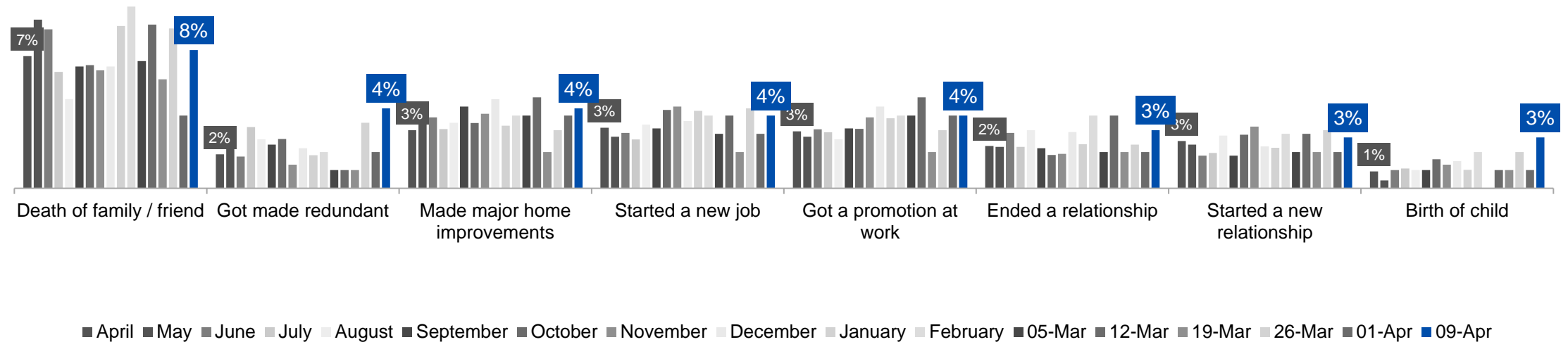


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Unfortunately, the percent of people experiencing the death of a family member or friend has increased again this week

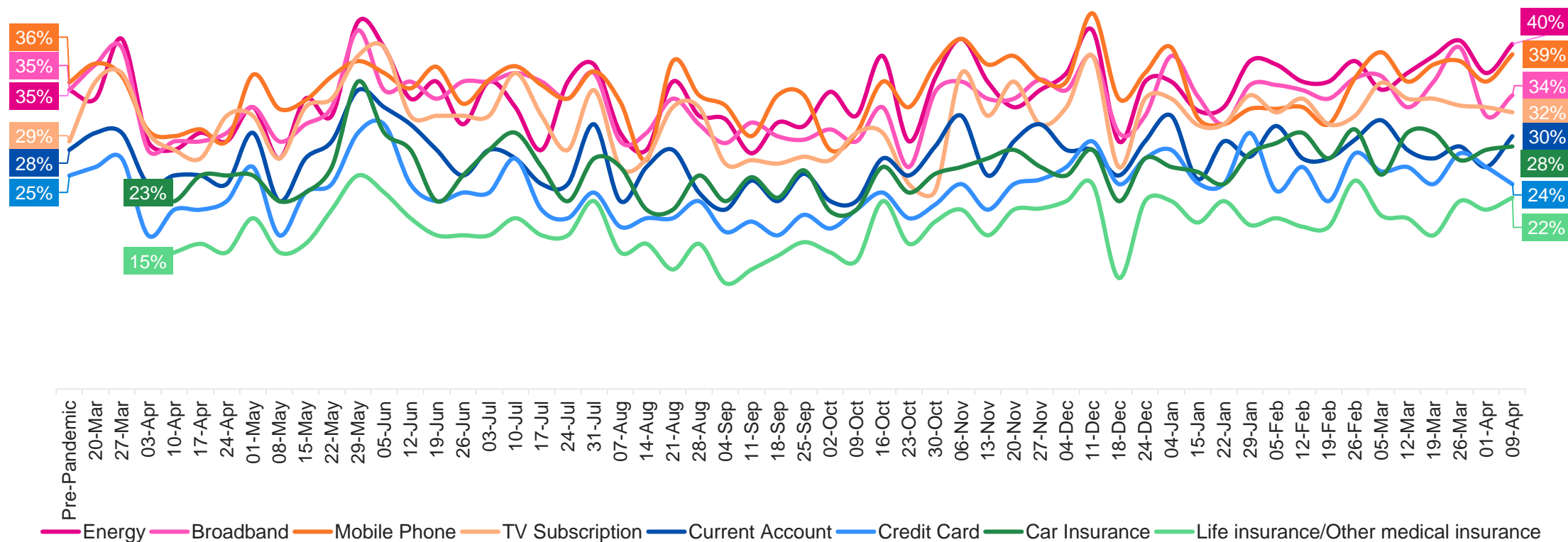
% who have done or have had the following happen to them in the last 4 weeks?





Interest in switching subscriptions has increased for most categories this week, after a slump last week

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



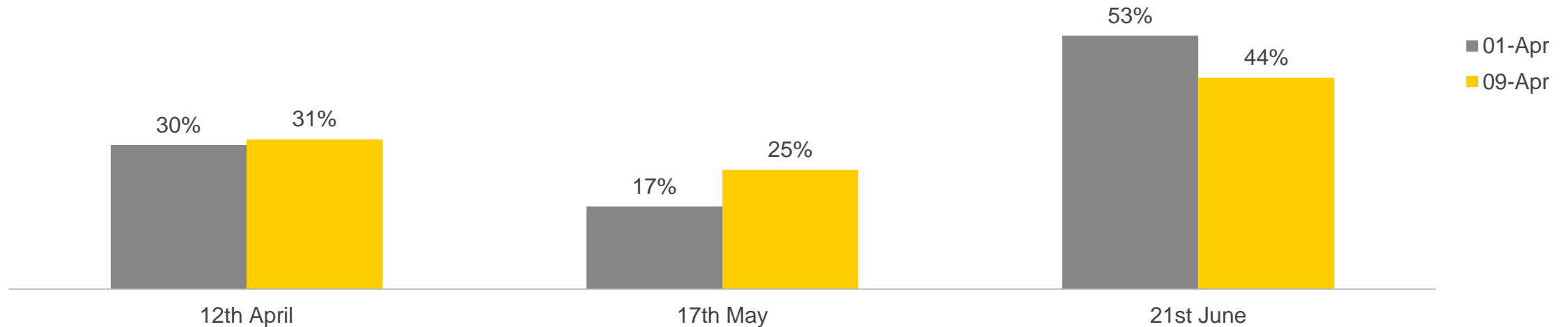
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Looking ahead

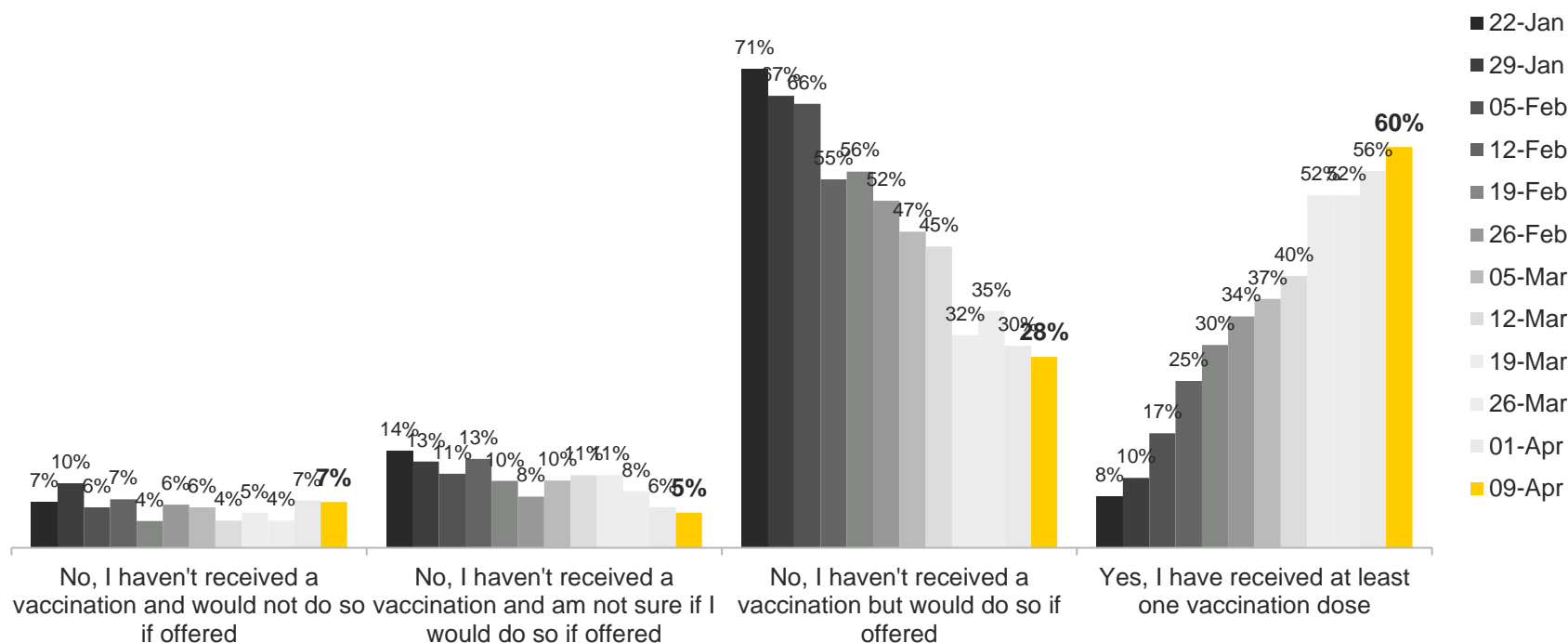
Ahead of the relaxing of lockdown restrictions on 12th April, people began looking ahead to the next date (17th May) more

The below dates represent key dates for lifting COVID-19 restrictions in England, please rank the dates according to which date you are most looking forward to
(% Most looking forward to)



6 in 10 of those surveyed have received at least one COVID-19 vaccination dose but news surrounding possible side effects continues to drive uncertainty

Have you received a vaccination for COVID-19?



The recent news of possible side effects, such as blood clots, have impacted confidence in the safety of vaccinations

“Not injecting my body with chemicals that actually causes blood clots and seizures”

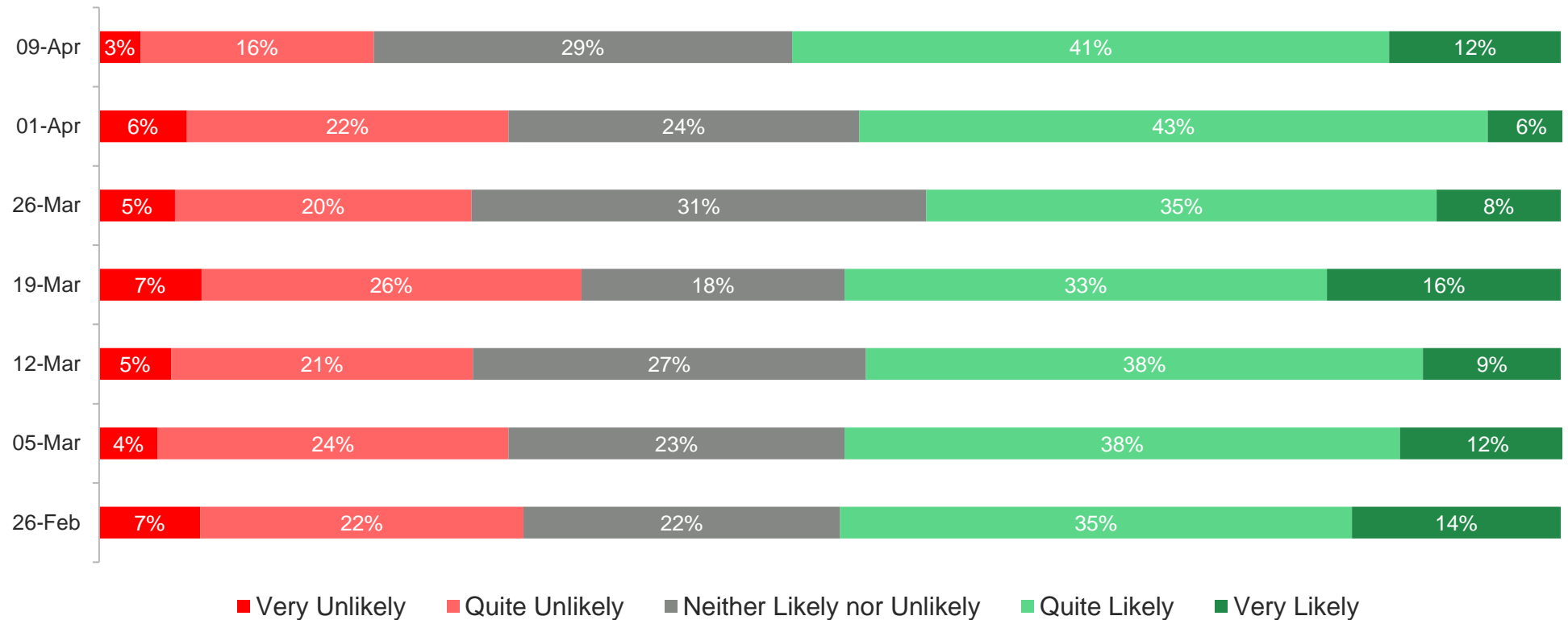
“Only recently they announced stopping giving young ones the Oxford vaccine but the older ones can still go ahead. There is something very dodgy and I am very sceptical and concerned for my loved ones who have already received their first dose. The government and the higher authorities need to stop playing with people’s lives we are not lab rats”

The benefits do not outweigh the risks for some people

“rushed, untested, dangerous side effects, doesn’t give any freedom or protection so no point”

Ahead of the easing of lockdown restrictions on 12th April, there is increased confidence that the current national lockdown restrictions in England will be lifted on 21st June

How likely do you think it is that all current national lockdown restrictions in England will be lifted on 21st June 2021?



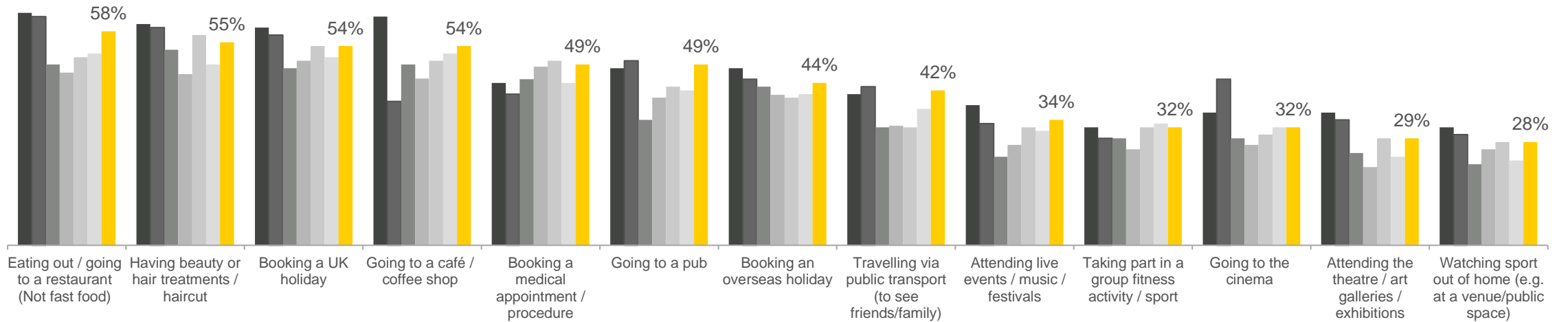


Eating out/ going to a restaurant, beauty treatments/haircuts, UK holidays and trips to coffee shops were top of mind ahead of the easing of lockdown restrictions

Interest going to the pub increased by 7ppts ahead of the reopening of pubs. Interest in eating out and getting beauty or hair treatments both increased by 6ppts this week

Which of the following activities have you thought about, researched and/or booked in the past 7 days?
 ANY ACTION (Thought about, researched/browsed or booked)

■ 26-Feb ■ 05-Mar ■ 12-Mar ■ 19-Mar ■ 26-Mar ■ 01-Apr ■ 09-Apr



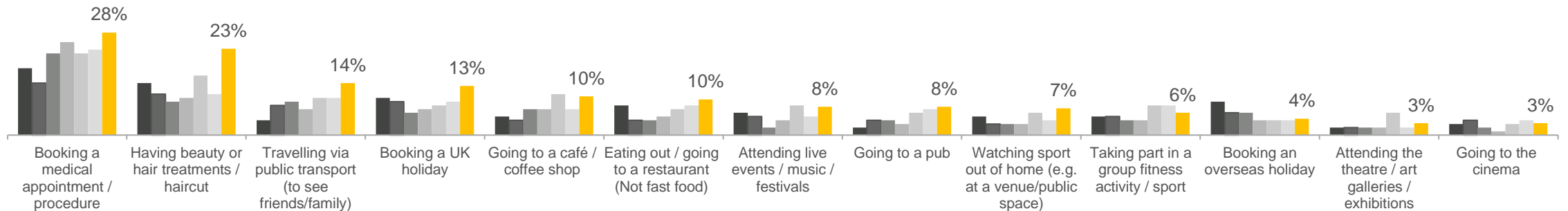


There was a last-minute surge in booking hair or beauty treatments/haircuts ahead of the reopening of salons and barbers

There were increases in bookings for personal treatments (medical appointments and haircuts) and transport (travel via public transport and UK holidays) in the last week

Which of the following activities have you thought about, researched and/or booked in the past 7 days?
BOOKED

■ 26-Feb ■ 05-Mar ■ 12-Mar ■ 19-Mar ■ 26-Mar ■ 01-Apr ■ 09-Apr

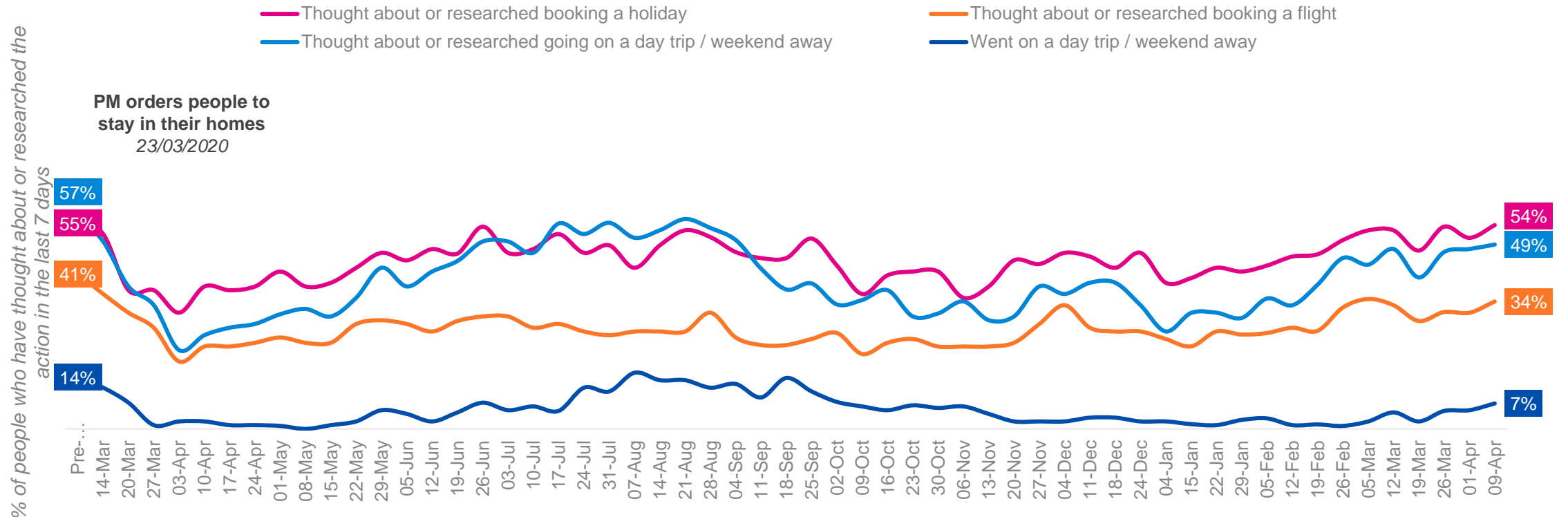




There were increased levels of travel consideration in the last week

Over 1 in 3 people were thinking about or researching booking a flight (+3ppts) and over ½ of the population claimed to be thinking about or researching booking a holiday (+3ppts)

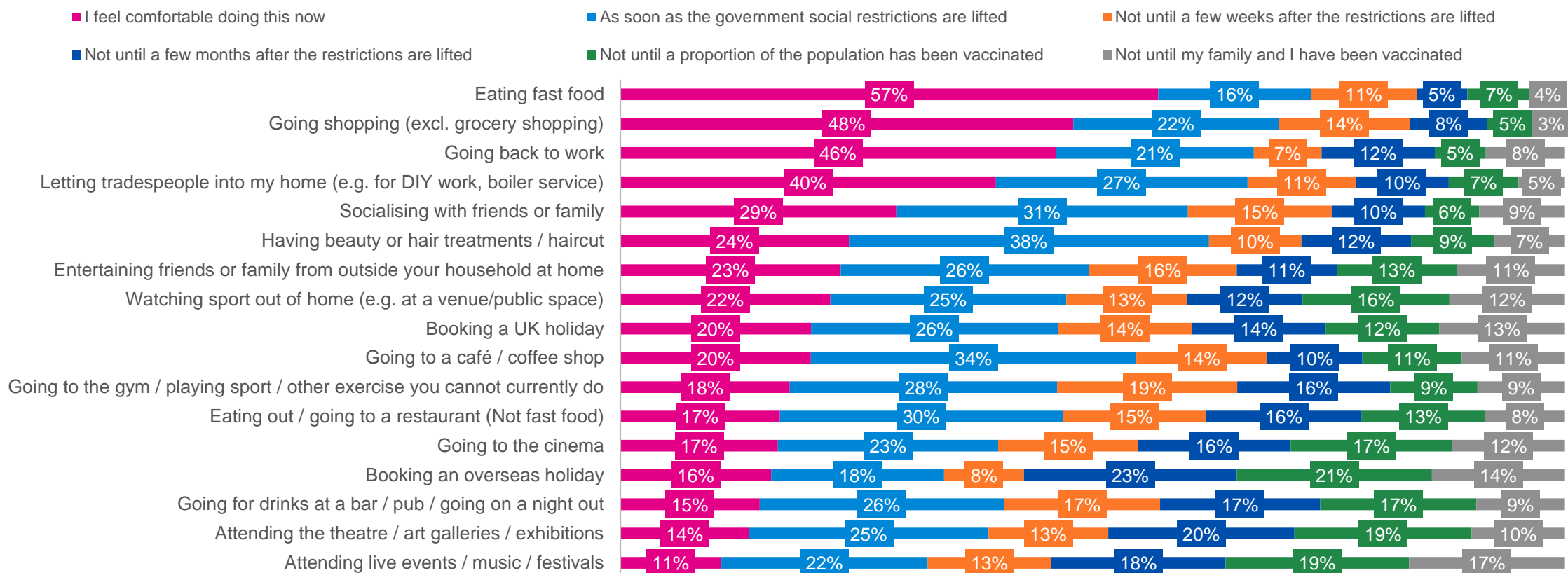
Looking at the different activities listed below, in the past 7 days which have you thought about and or researched if at all?
Which of the below, if any, have you done or have happened to you in the last 7 days? – Went on a day trip



People are feeling more comfortable socialising and entertaining friends and family, however are less comfortable with the idea of returning to work this week

A quarter of people now state they feel comfortable socialising with friends or family (up 4ppts), and the percentage of those who currently feel comfortable entertaining friends or family outside their household at home as increased 5ppts.

When would you feel comfortable doing the following again?



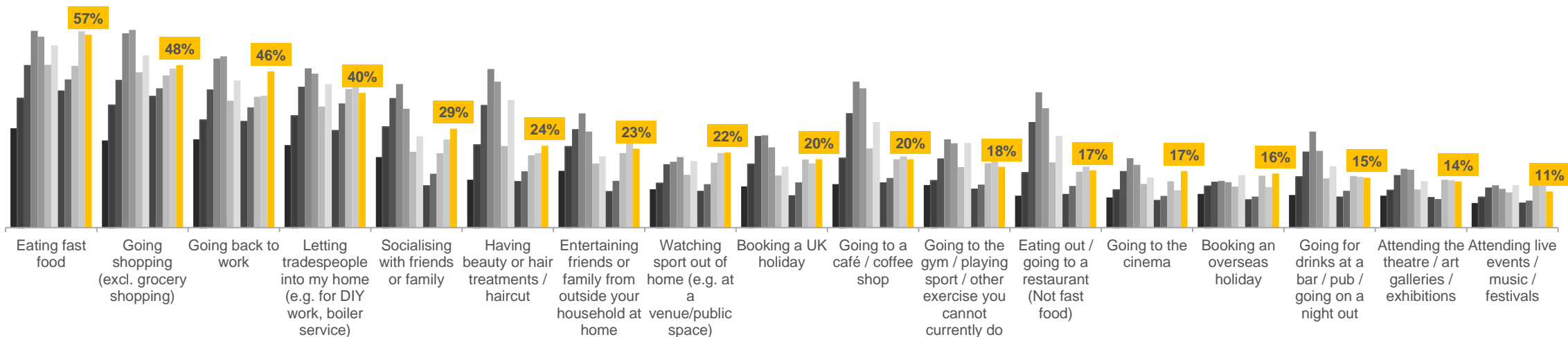


Ahead of the reopening of non-essential retail, almost half of the population said that they feel comfortable going shopping and there is positive momentum in the percentage of people that feel comfortable socialising with friends or family

Despite the imminent reopening of pubs/bars, only 15% of people currently feel comfortable returning to them, unchanged since March

And at what stage would you feel comfortable doing the following?
I feel comfortable doing this now

■ Jun-20 ■ Jul-20 ■ Aug-20 ■ Sep-20 ■ Oct-20 ■ Nov-20 ■ Dec-20 ■ Jan-21 ■ Feb-21 ■ Mar-21 ■ 01-Apr ■ 09-Apr

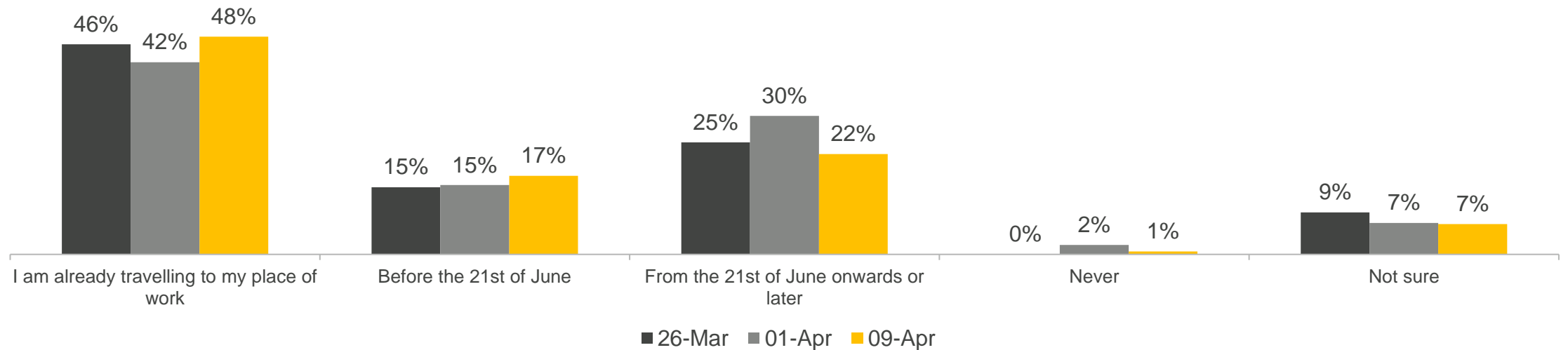


Source: OMD Radar Survey. June 2020 – April 2021. Amongst those who would usually conduct each activity (bases all above 150).

Almost 1/2 of those in employment are already travelling to their place of work

7% of people in employment remain unsure when they will continue travelling to their place of work

When do you expect to be travelling to your place of work full-time or at least part-time?

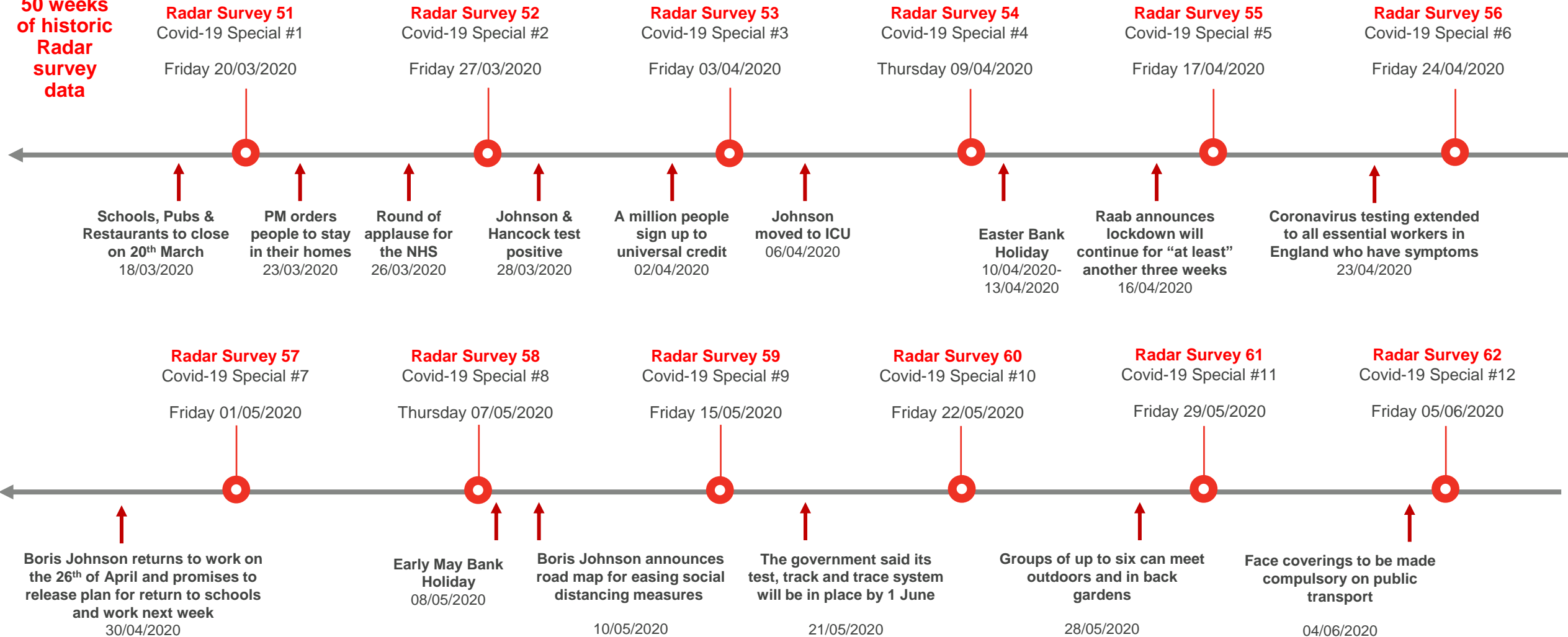


Appendix



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

Radar Survey 94
Covid-19 Special #44
Friday 22/01/2021



**PM announces new variant
"may be associated with a
higher degree of mortality"**
22/01/2021

Radar Survey 95
Covid-19 Special #45
Friday 29/01/2021



**PM announces schools
unlikely to reopen
before 8th March 2021**
27/01/2021

Radar Survey 96
Covid-19 Special #46
Friday 05/02/2021



**Government announces
mandatory hotel quarantines
for travellers from travel ban
countries from 15th Feb 2021**
05/02/2021

Radar Survey 97
Covid-19 Special #47
Friday 12/02/2021



**Over 90% of
everyone over 75
now vaccinated**
10/02/2021

Radar Survey 98
Covid-19 Special #48
Friday 19/02/2021



**Vaccine given to 15 millions
people in the UK**
14/02/2021



Survey Timeline

**98 weeks
of historic
Radar
survey
data**

Radar Survey 99
Covid-19 Special #49
Friday 26/02/2020

Radar Survey 100
Covid-19 Special #50
Friday 05/03/2020

Radar Survey 101
Covid-19 Special #51
Friday 12/03/2020

Radar Survey 102
Covid-19 Special #52
Friday 19/03/2020

Radar Survey 103
Covid-19 Special #53
Friday 26/03/2020

Radar Survey 104
Covid-19 Special #54
Thursday 01/04/2020

**Boris announces lockdown
measures to be completely
lifted by end of June 2021**

22/02/2021

Children return to schools

08/03/2021

**12 months on from PM
ordering people to stay
in their homes**

23/03/2021

**Lockdown restrictions
are eased to allow rule
of 6 outdoors**

29/03/2021

**Easter Bank Holiday
weekend**

02/04/2021

Radar Survey 105
Covid-19 Special #55
Friday 09/04/2020

**Lockdown restrictions are eased
to allow rule of reopening of
outdoor venues, non-essential
retail and salons/barbers**

12/04/2021