



COVID-19 Consumer Impact Report
w/c 01.03.21

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 99 weeks, surveyed over 28,000 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 252 respondents in the UK between Friday 26th February to Sunday 28th February 2021.

Summary: Optimism, happiness and life satisfaction are all up thanks to the latest announcement from the PM and the continual success of the vaccination roll-out

- 01 **Happiness levels** have increased 2ppt this (32% to 34%) and there has been a 3ppt increase in **optimism** (up from 19% to 22% in the last 7 days). **Life satisfaction** has also increased from 30% to 32%.
 - 02 After the announcement of restrictions lifting in June, **confidence in future business conditions** has jumped 13ppt in the past 7 days, however concerns over **personal finances** are still on the rise.
 - 03 **Confidence in the government** has increased 8ppts thanks to the vaccine roll-out and the latest PM announcement. However some are concerned lifted restrictions too soon will have a negative impact on progress.
 - 04 People continue to say they are **supporting local businesses** during lockdown (56%), and we have seen a 10 ppt jump in those reporting to be trying new brands (up from 29% to 39%).
 - 05 Following the MPs announcement on the roadmap for lifting lockdown, **people have been quick to book medical appointments** (18%) **and beauty/hair appointments** (14%), and **6 in 10 people have been thinking about and/or researching places to go out for meals**
 - 06 **More people feel comfortable returning to out of home activities this week** and **1 in 10 people have booked a UK holiday** since the MPs announcement on the 22nd February
-







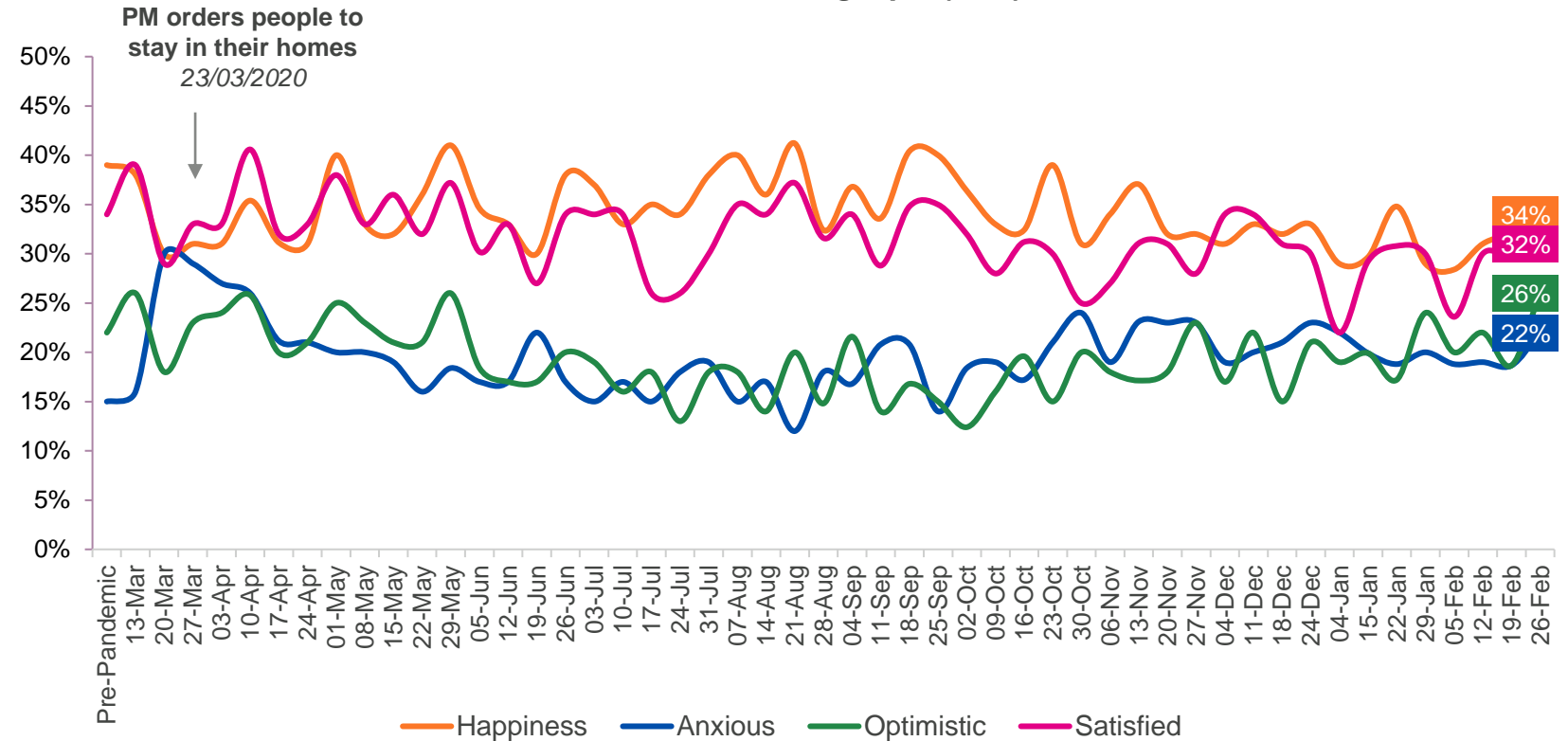
**Life satisfaction,
optimism & consumer
confidence**



Optimism, life satisfaction and happiness have all increased in the last 7 days, however anxiety levels have risen slightly

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

-  Happiness levels have increased 2ppt this week from 32% to 34%
-  There has been a 3ppt increase in optimism this week, up from 19% to 22% in the last 7 days
-  Satisfaction levels have increased from 30% to 32%
-  Anxiety levels have also increased this week, from 19% to 22%

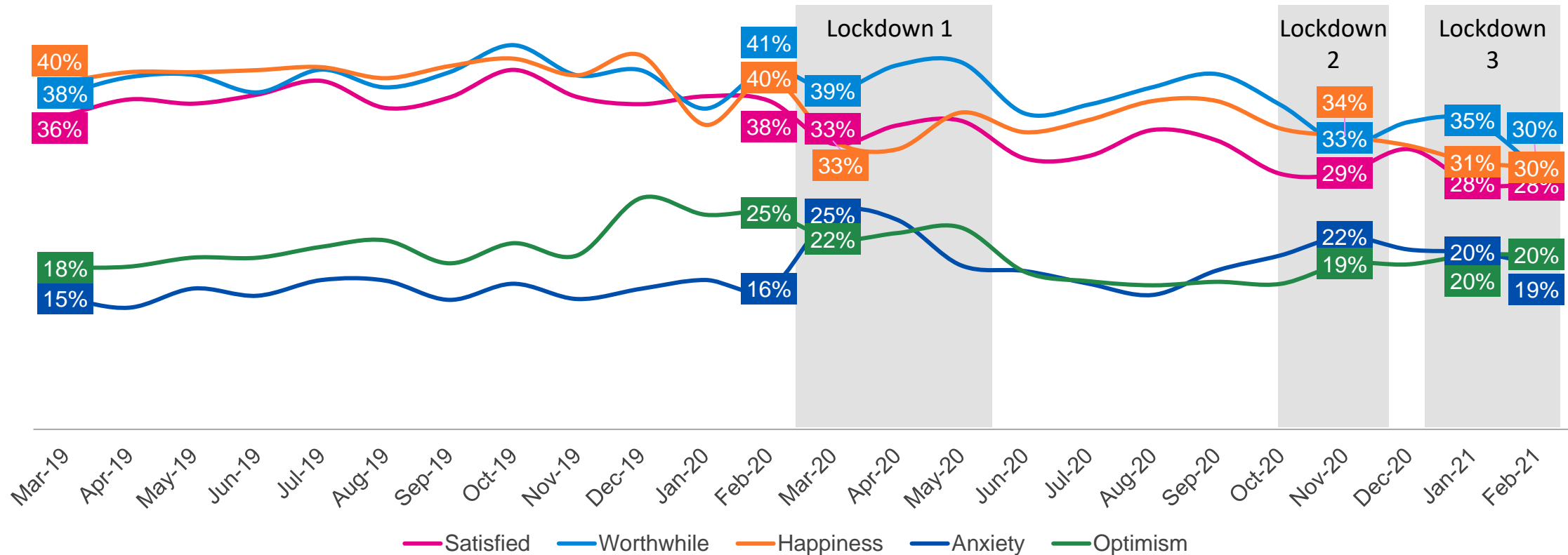


Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250,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



Despite minor improvements this week, Happiness continues to be at a lower level in February compared to previous months

The mood of the nation over time



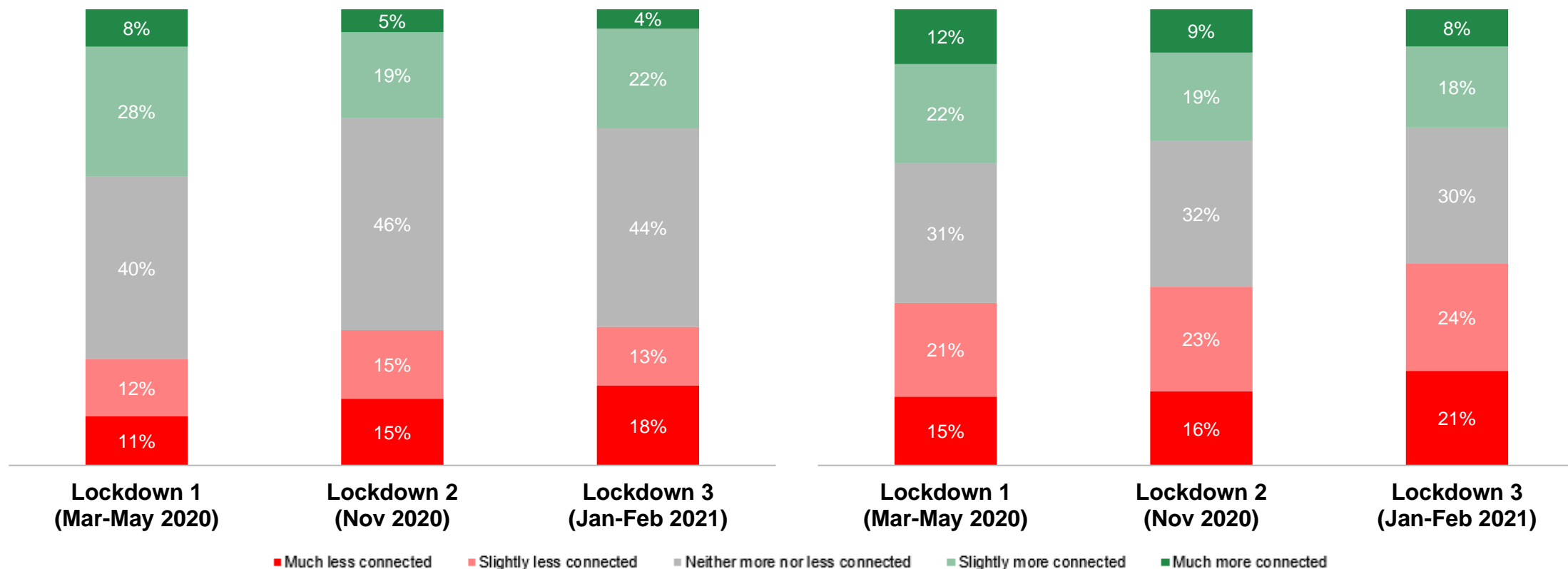


The nation are continuing to report feeling less connected to their friends, family and community than they did during Lockdown 1

There has been a 6ppt increase in feeling more connected to the community this week, with no change to feeling connected to friends/family.

To what extent do you feel more or less connected to your community compared to before the COVID-19 outbreak?

To what extent do you feel more or less connected to your friends/family compared to before the COVID-19 outbreak?





After the announcement of restrictions lifting in June, confidence in future business conditions has jumped 13ppt in the past 7 days



There has been a 1ppt incline in the percent of people feeling financially secure, from 39% to 40%

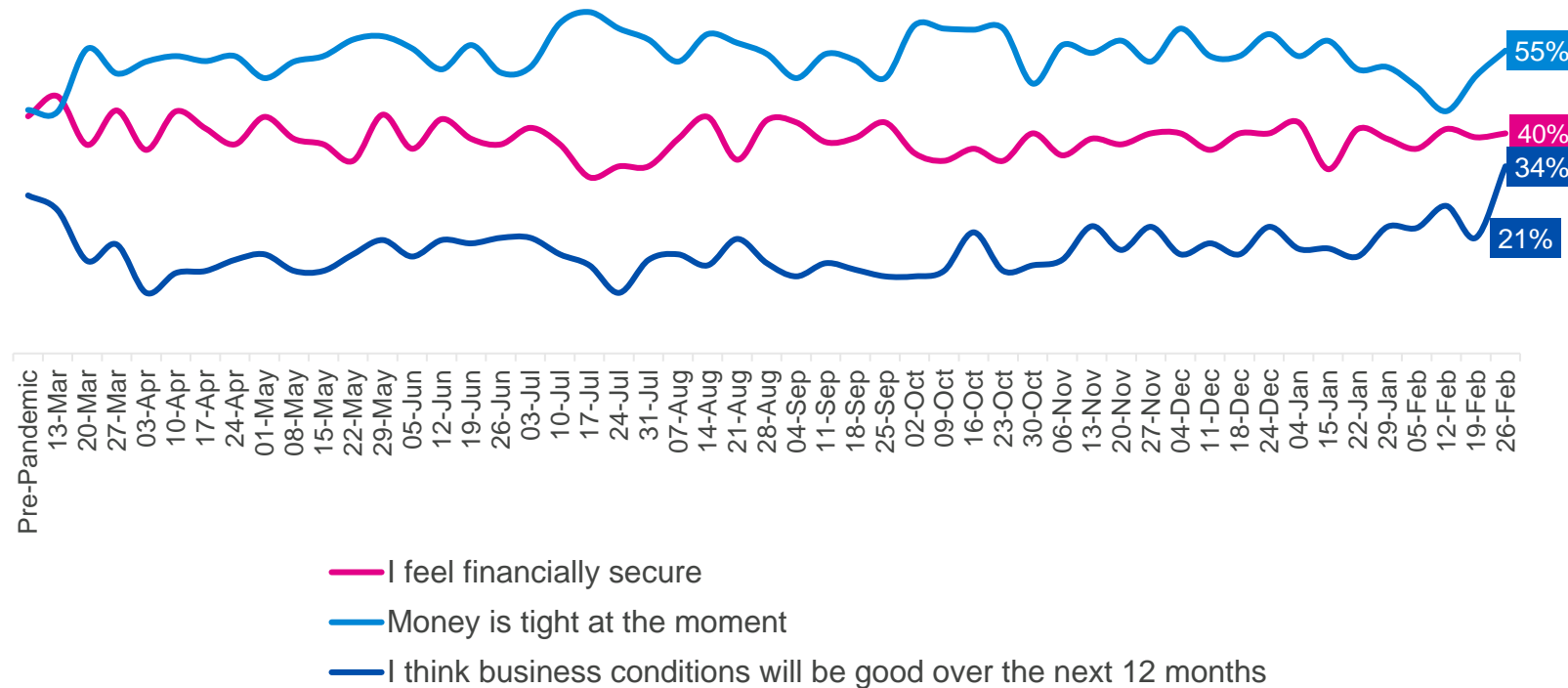


After a significant decrease last week, those stating that money is tight at a the moment has increased 5ppt from 50% to 55%



There has been a 13ppt increase in confidence in future business conditions, up from 21% to 34%

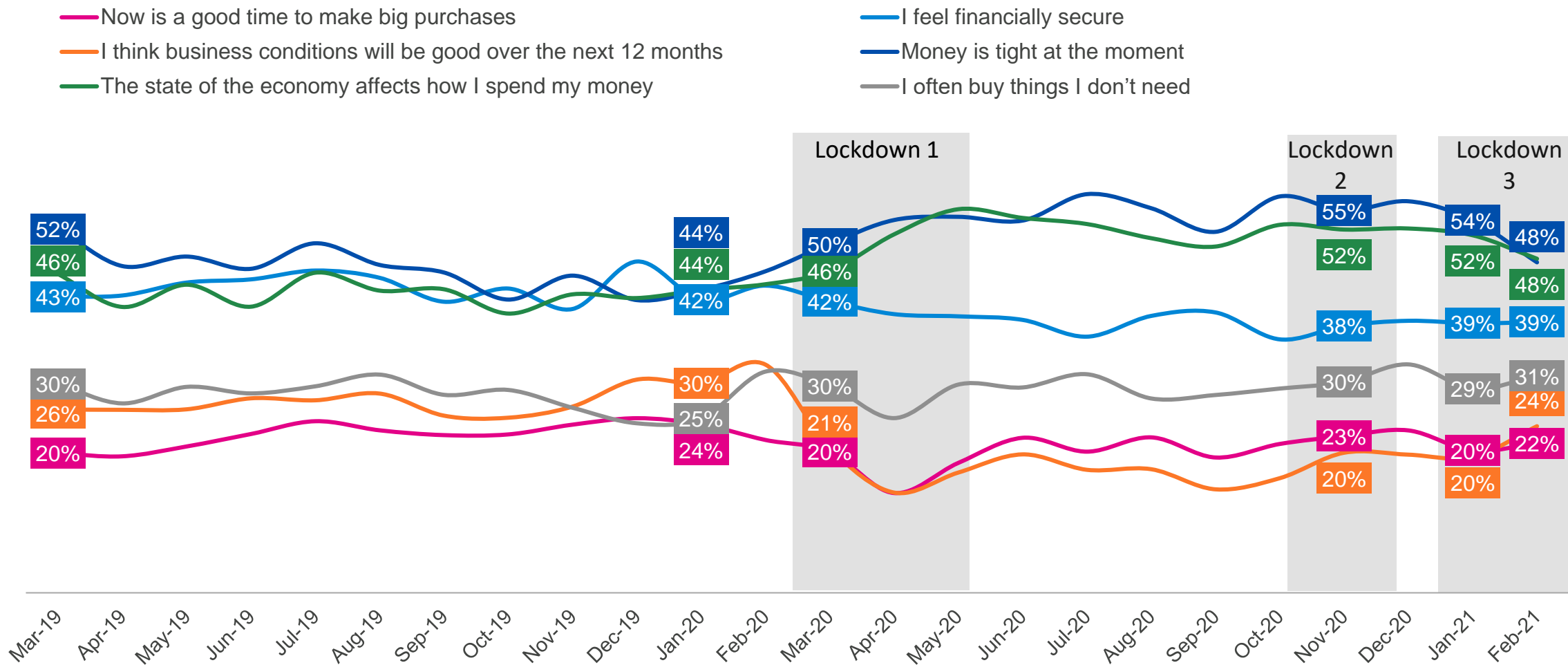
To what extent do you agree with the following statements?
(0=Not at all, 10=Completely)
% selecting top 3 (8-10)



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

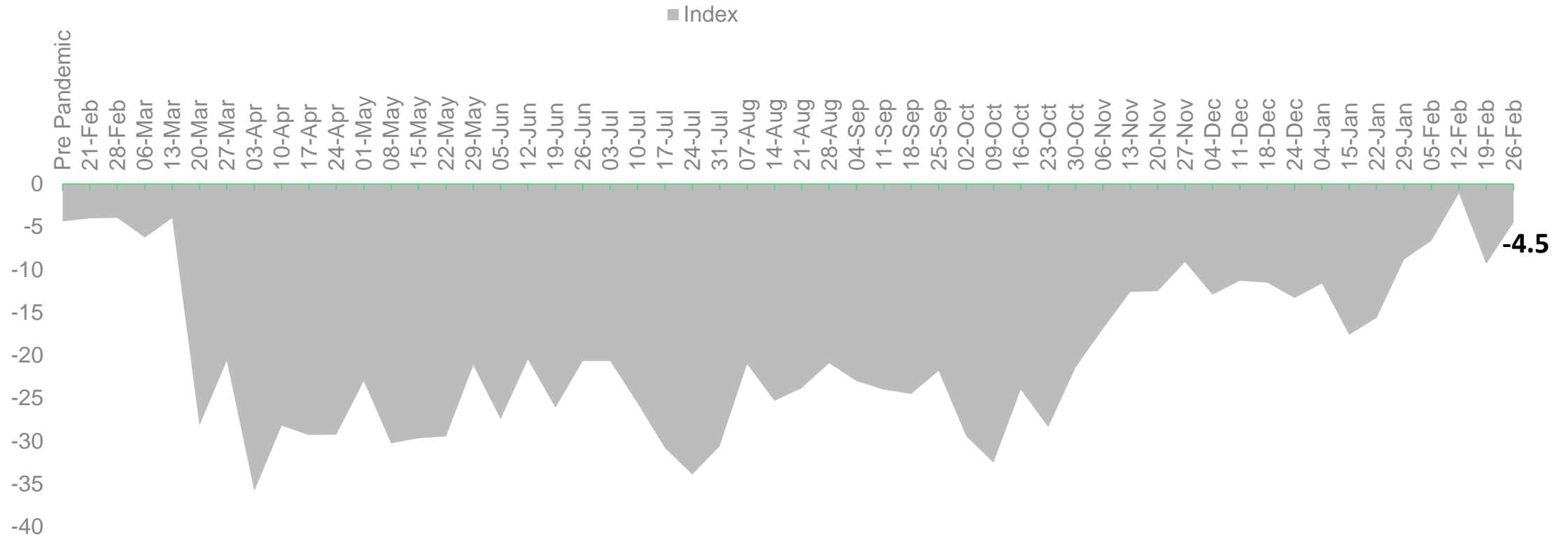


Feelings towards personal finances show similar patterns to those seen in Lockdown 1





Consumer Confidence has increased this week, up from -9.3 to -4.5



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 increased again this week, particularly around personal savings

18% of households have someone that has been **furloughed**

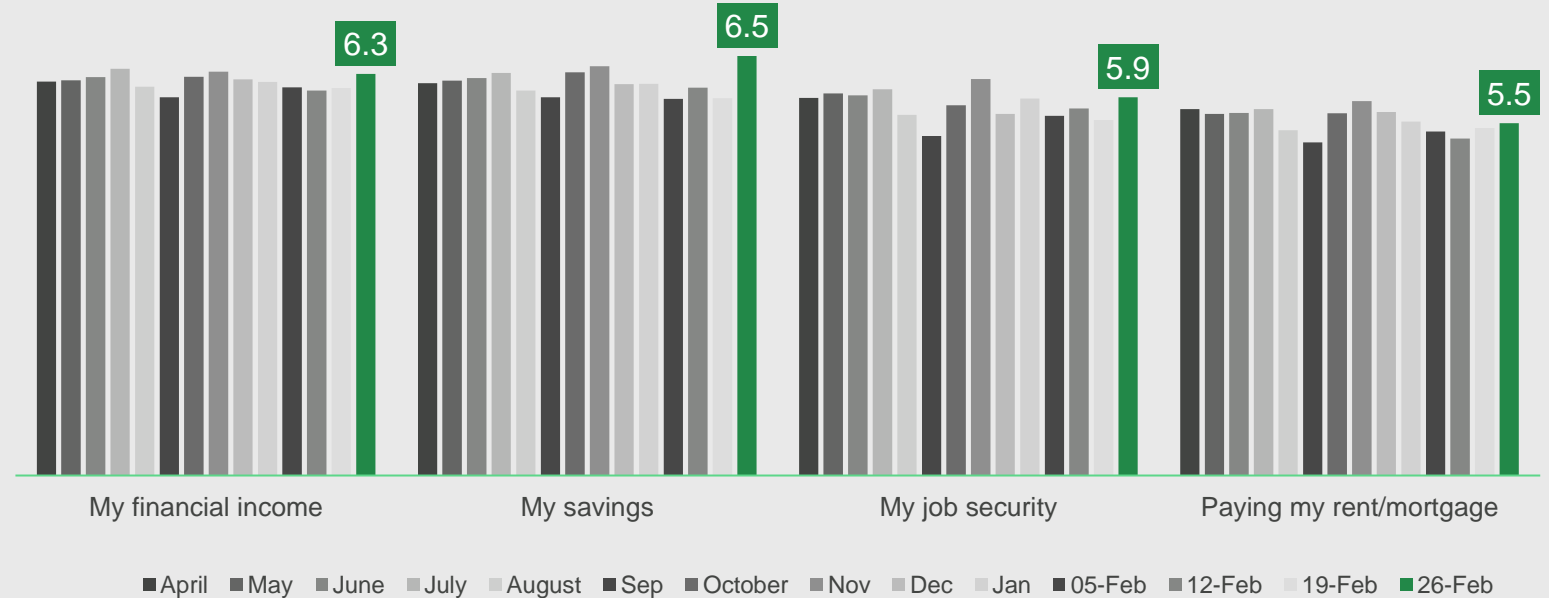
6% of households contain someone that has had their **salary reduced** since the COVID-19 outbreak

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

68% say that **their employer has been supportive** during the COVID-19 outbreak



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)



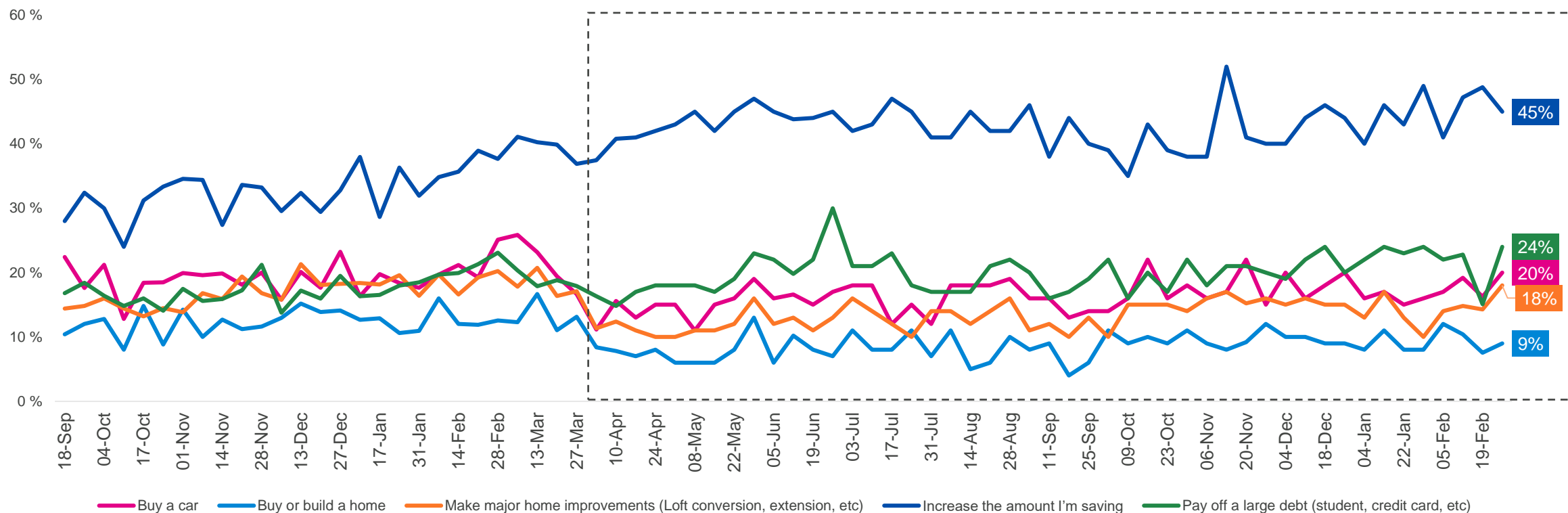
Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250,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



Intent to purchase big ticket items has increased across categories this week, as has plans to pay off a large debt

Intent to increase savings has decreased this week after two weeks of increases, dropping 4ppts in the last 7 days

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

Confidence in Government & Broad Concerns



Confidence in the government has increased 8ppts thanks to the continual success of the vaccination roll-out and the latest PM announcement

However, there is concern that lifting restrictions too soon and allowing children back to school will have a negative impact on progress:

“Because if they let children back to school and people going back to there normal life’s everything could become worse”

“Children shouldn’t return to school until teachers have took the vaccine”

“It’s dangerous that the lockdown is getting lifted too soon”

“Because if they let children back to school and people going back to there normal life’s everything could become worse.”

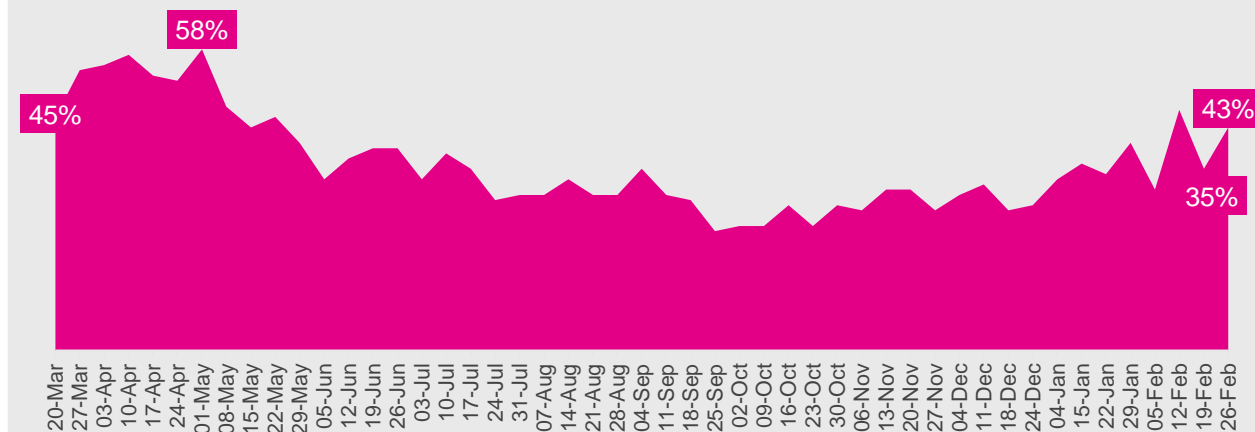
Although the vaccine roll out continues to improve confidence for many:

“Feel better knowing the vaccine rollout working”

“They did not deal with things straight away or were not strict enough, however the vaccine programme is going well”

“.the government has had to do their best having no experience of this . I think they have done the best they could in difficult circumstances . Their brave move to finance and support the development of a vaccine has meant that we are in a very good position towards normality”

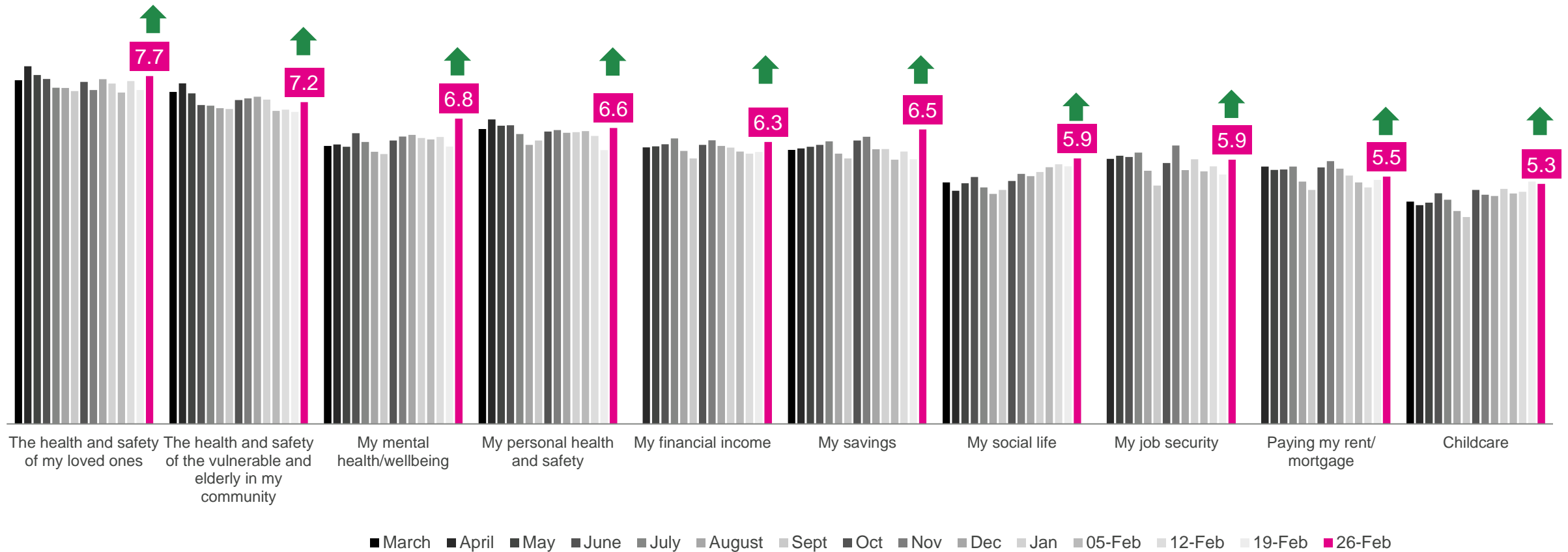
How confident are you in the government’s response to the COVID-19 outbreak?
(% Confident)





Personal life concerns have increased across the board this week, with the biggest rise being concern for mental health and 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



Concerns over racism has increased 7ppts in the last 7 days and concerns over crime has increased 6ppts

Concerns for unemployment/poverty has not increased this week (staying at 81%), however this is significantly higher than levels seen in previous months

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

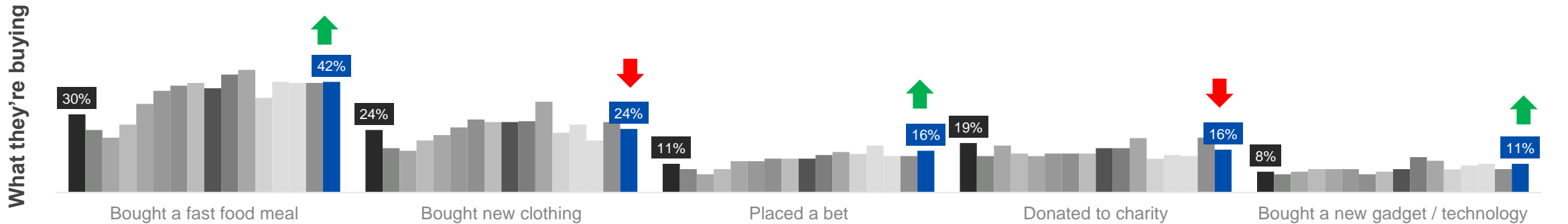
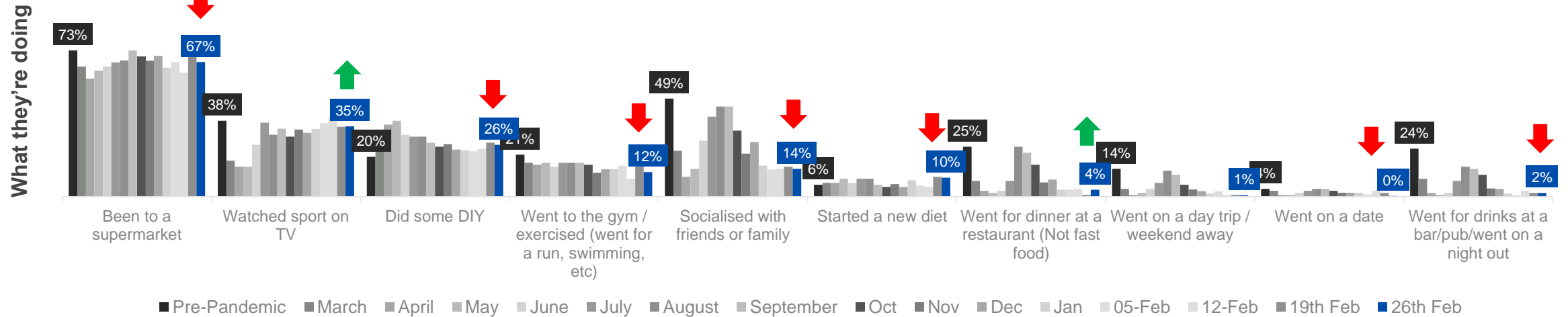


Changes in Behaviour

The percentages of those socialising with family and friends continues to decline

The percent that have donated to charity has dropped back down again in the last 7 days from 21% to 16%

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

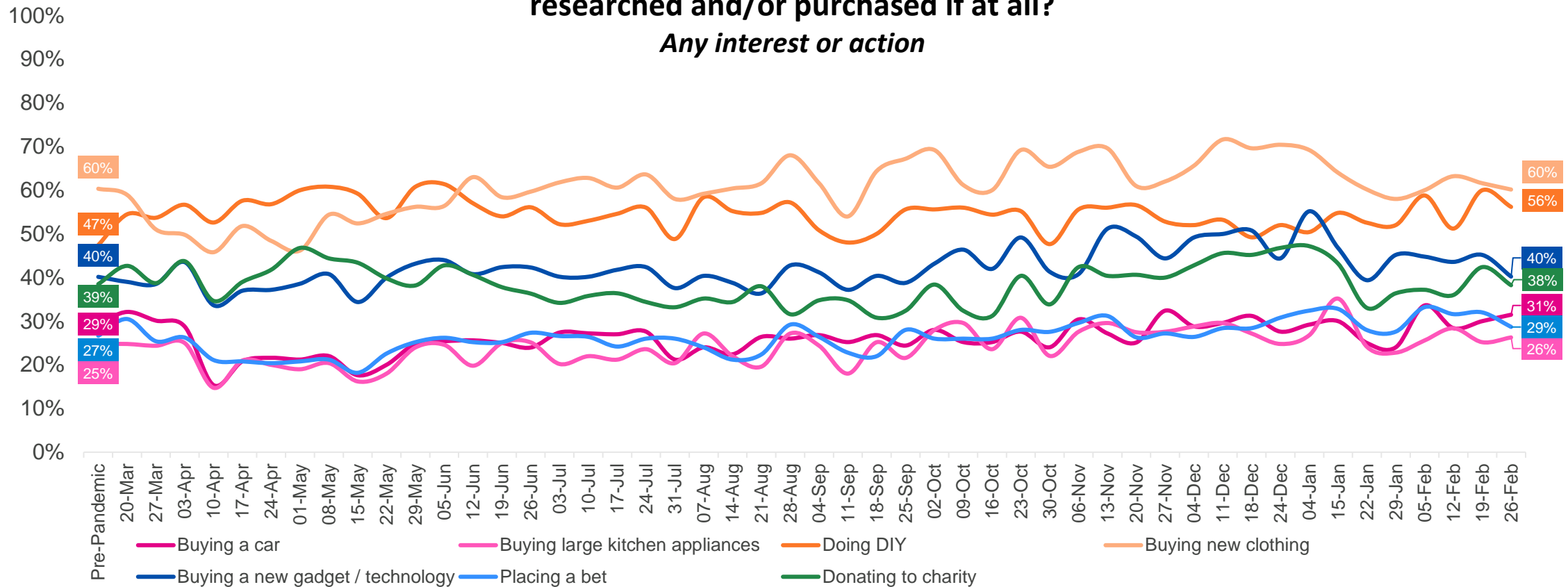


Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250,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



Interest in DIY is 9ppts higher than pre-pandemic levels despite a 4ppt decline this week

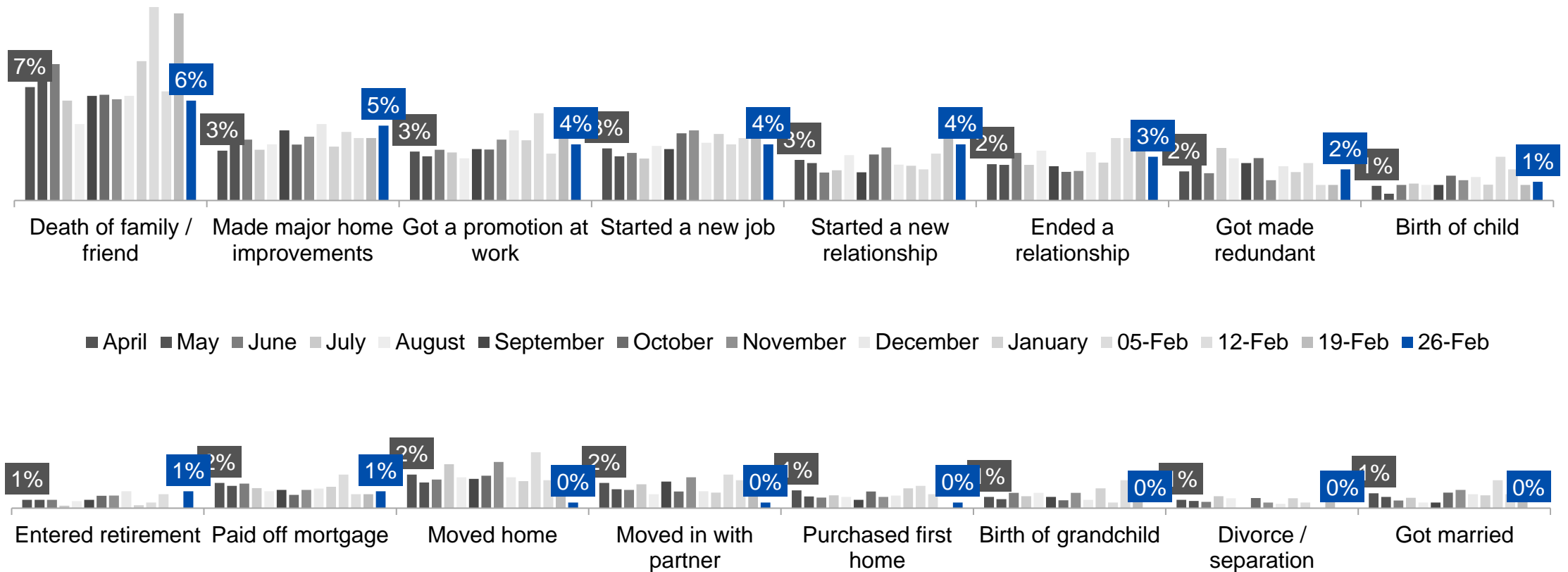
Looking at the different activities listed below, in the past 7 days which have you thought about, researched and/or purchased if at all?
Any interest or action





Despite seeing a significant drop this week, death of a family/friend continues to be the highest event experienced by respondents

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

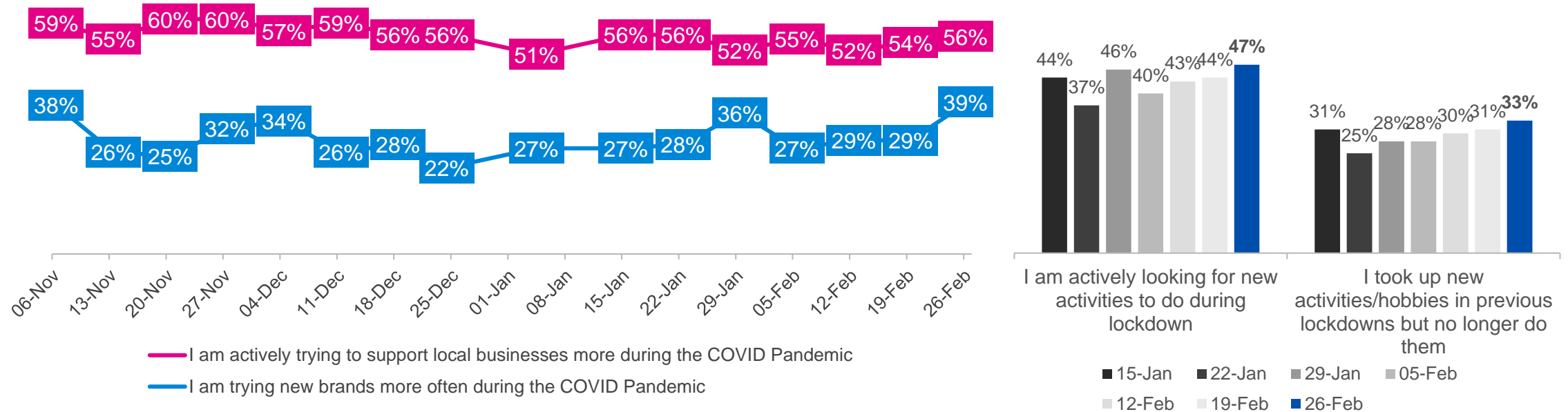


Source: OMD Radar Survey. April (1500), May (2500), June (2001), July (1750), August (1000), September (1000), October (1254), November (1001), December (1000), January (986), 05/02 (250), 12/02 (250), 19/02 (252), 26/02 (250)



People continue to say they are supporting local businesses, and we have seen a 10 ppt jump in those reporting to be trying new brands

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

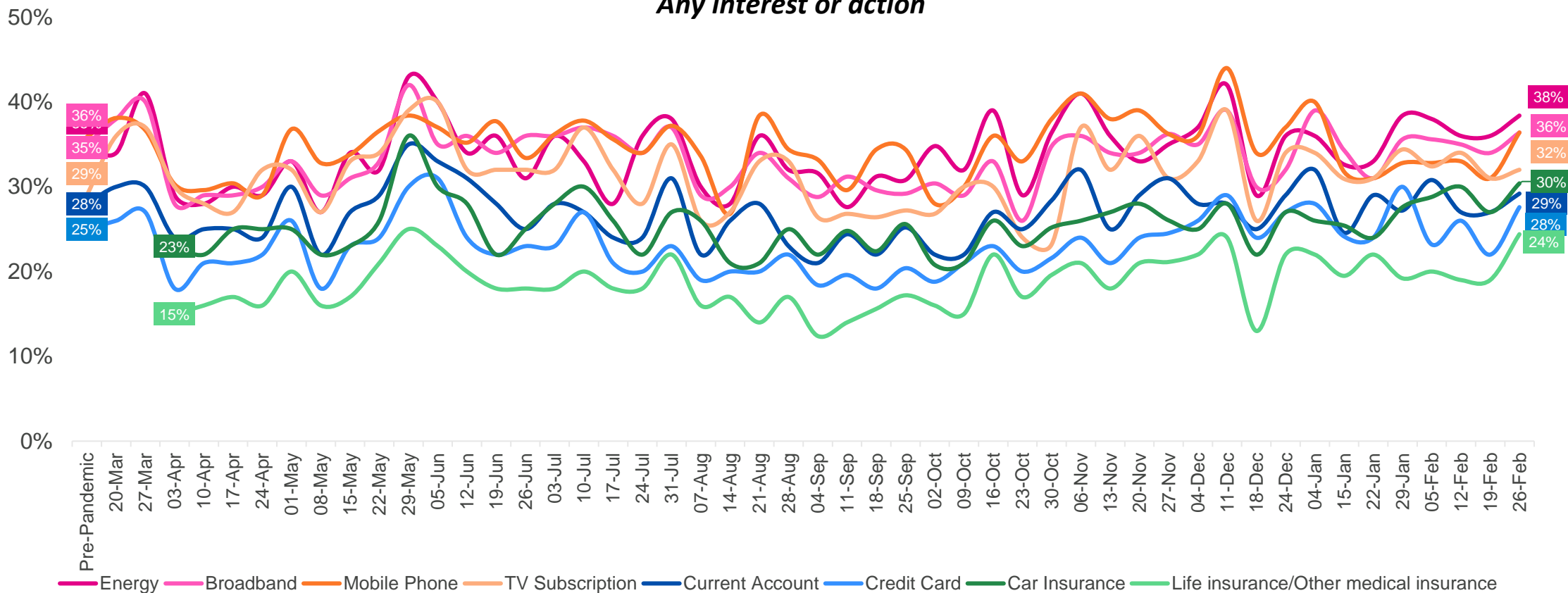


Source: OMD Radar Survey, 6/11: 250, 13/11: 251, 20/11:250 27/11:250, 4/12: 250, 11/12:250, 18/12:250, 24/12:250, 04/01:250, 15/01: 236, 22/01: 250, 29/01: 250, 05/01:250 12/02:250, 19/02:252, 26/02:250.



Interest in Life and Medical insurance has increased in the last two months and is 9ppt higher than first recorded last April

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



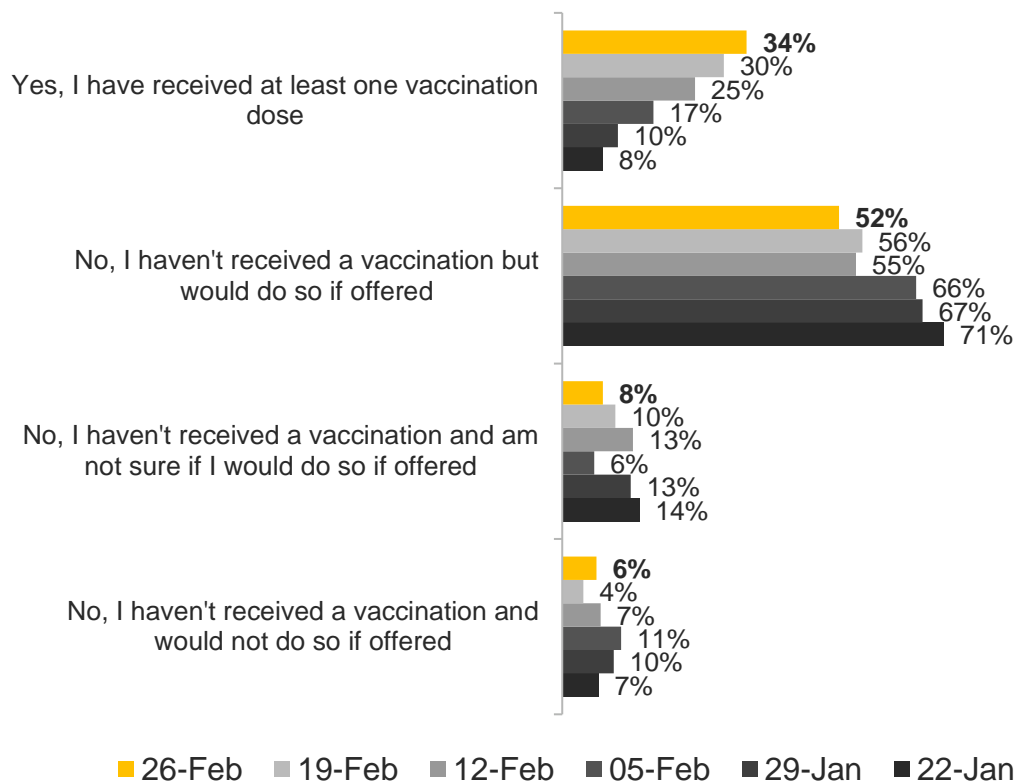
Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250,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



Looking ahead

The percentage of the population that have received a vaccination dose continues to rise but a minority of vaccination rejectors remains

Have you received a vaccination for COVID-19?



Trust remains a prominent barrier to the uptake of COVID-19 vaccinations, in part due to a lack of trust in the government

“I don't trust the vaccine as it is just another example of a government rush job”

“I don't exactly trust as the virus was confirmed a little over a year ago and the vaccine is so sudden.”

“Don't trust it or the government at all”

“The government are indirectly forcing us to have it, fearing us into getting it, we don't know where the virus came from so how can we vaccinate against it, and other countries got rid of covid without vaccines”

The speed of development and the lack of evidence on long-term side effects are omnipresent considerations for those unsure

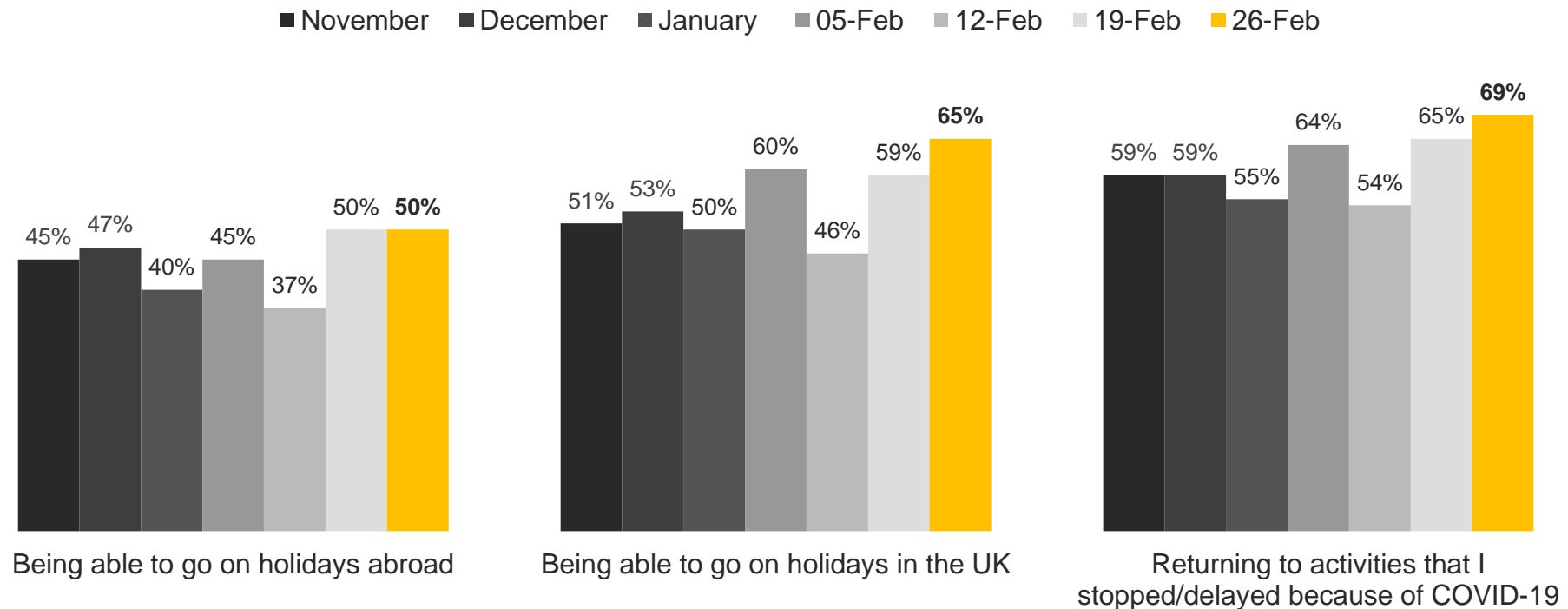
“Vaccine was rushed, no information on long term side effects, vaccine makers made fortune, covid survival rate is <99%”

“I want to wait and see if people have long term side effects its not been tested enough vaccines usually take a decade to perfect so this is highly suspicious. I have no faith that we are being told the truth I think more will die yet and it will be yet another failure of government.”

“I don't trust it yet, heard of a lot of negative side effects”

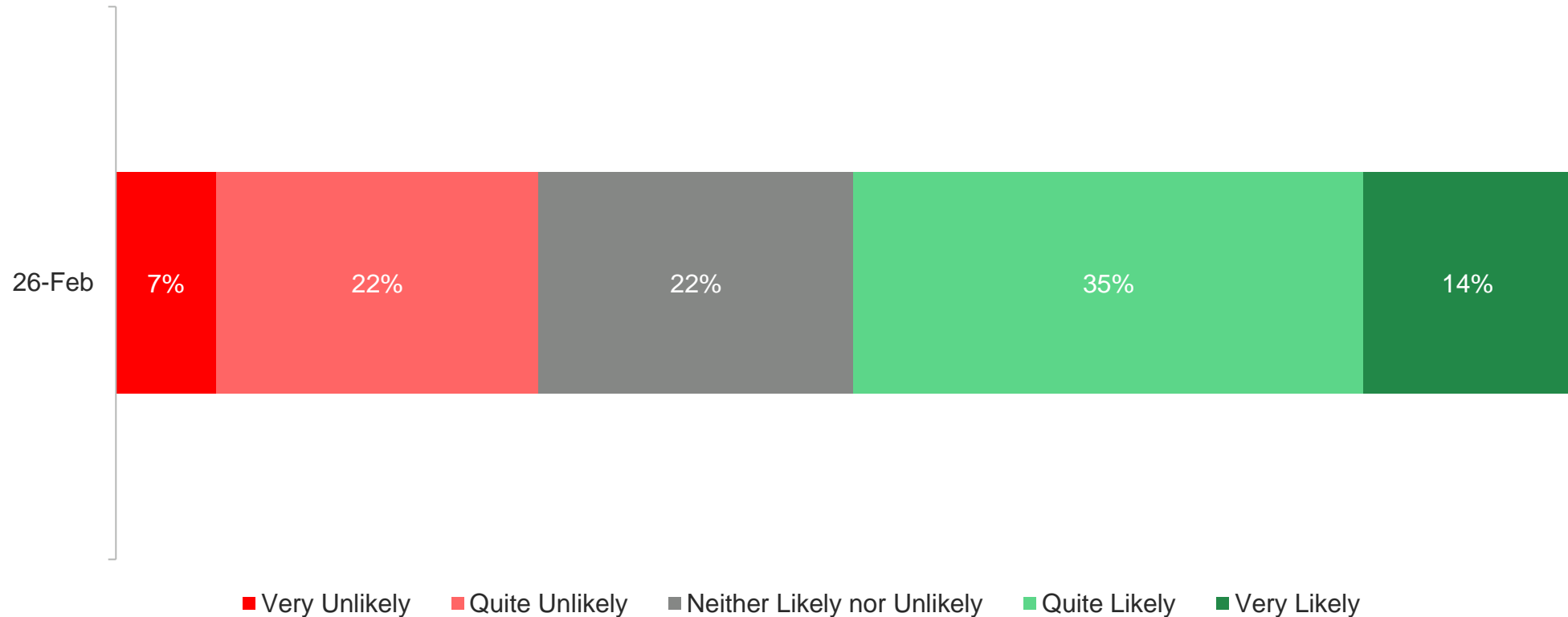
Optimism as a result of COVID-19 vaccinations has continued to rise following Monday's government announcement on the plans to lift lockdown restrictions

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



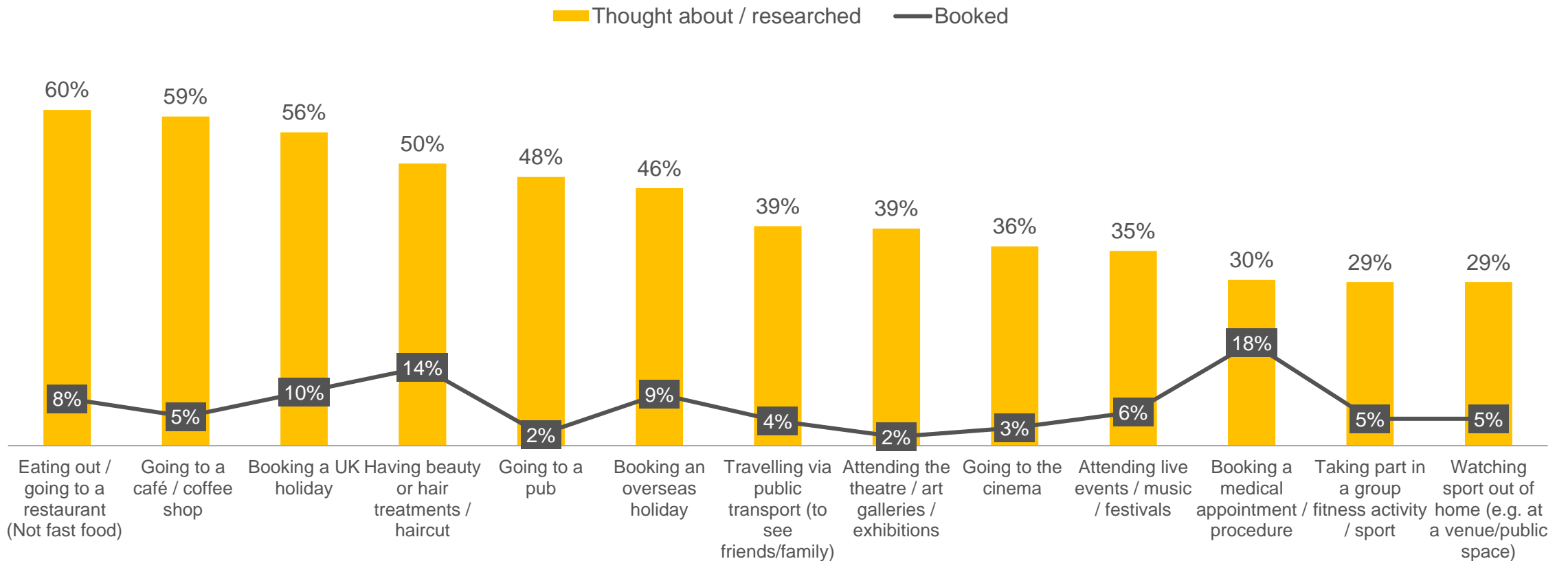
Following the announcement of the timeline for lifting lockdown, almost half (49%) of those in England think that it's likely that all current lockdown restrictions will be lifted on 21st June 2021

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



After Boris' announcement, many are thinking about and/or researching places to go out for meals, and 1 in 7 have already booked a beauty appt

Since Boris' announcement on Monday (22nd February) outlining a roadmap out of lockdown, which of the following activities have you thought about, researched and/or booked?

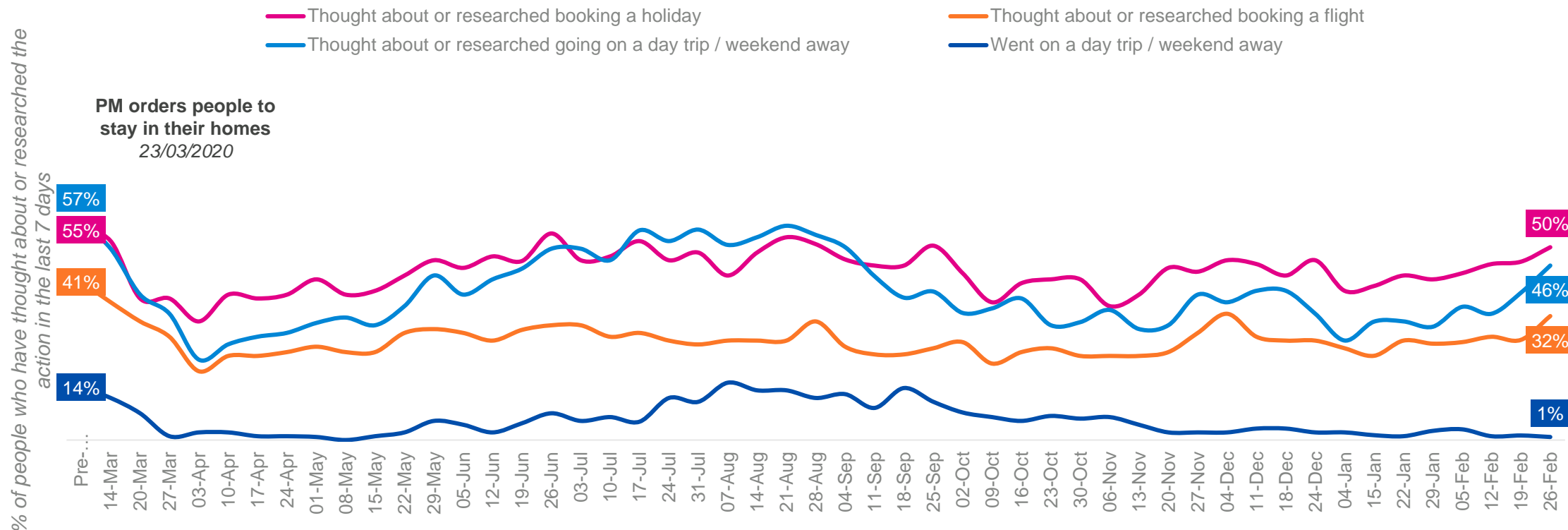




The uplift in interest in travel, driven by last Monday's announcement, resulted in the highest interest in booking a holiday or day trip since August

Interest in day trips is up by 8ppts this week, interest in flights grew by 6ppts and interest in holidays increased by 3ppts

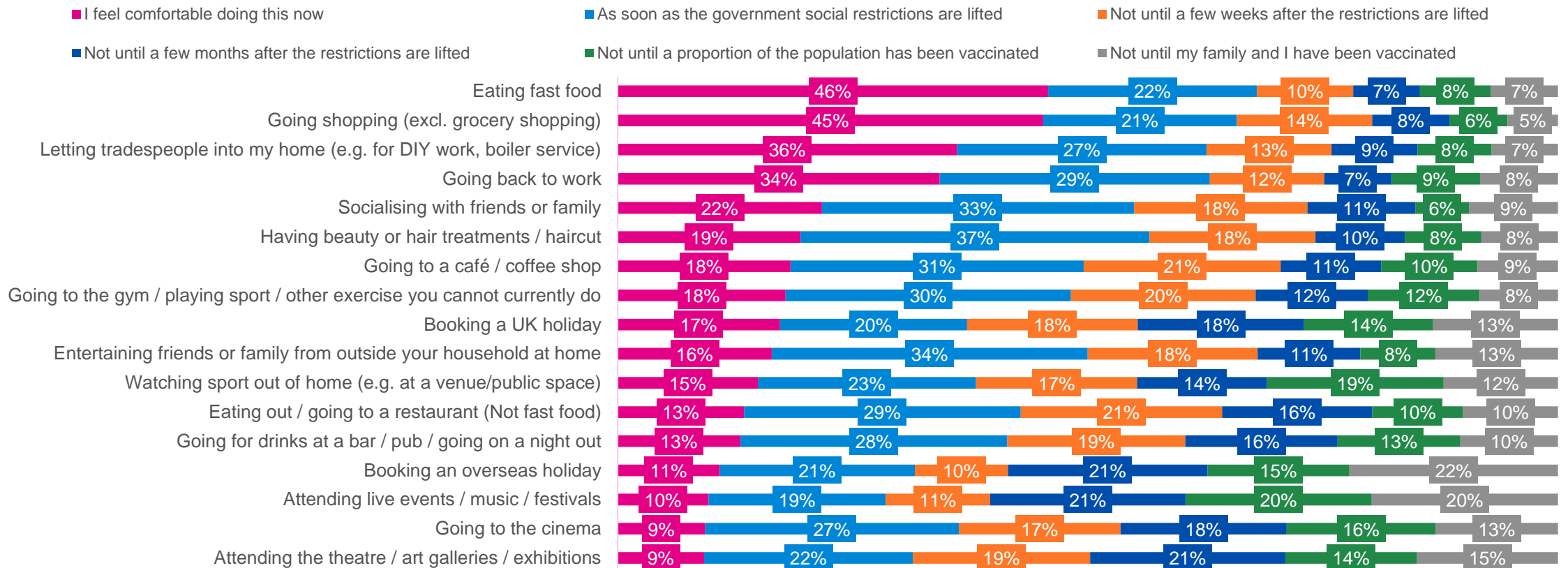
Looking at the different activities listed below, in the past 7 days which have you thought about and or researched if at all?
Which of the below, if any, have you done or have happened to you in the last 7 days? – Went on a day trip



There have been increases in the percentage of people that feel comfortable doing all activities, except returning to work, this week

There has been a 9ppt increase in the percentage of people that feel comfortable socialising with friends

When would you feel comfortable doing the following again?

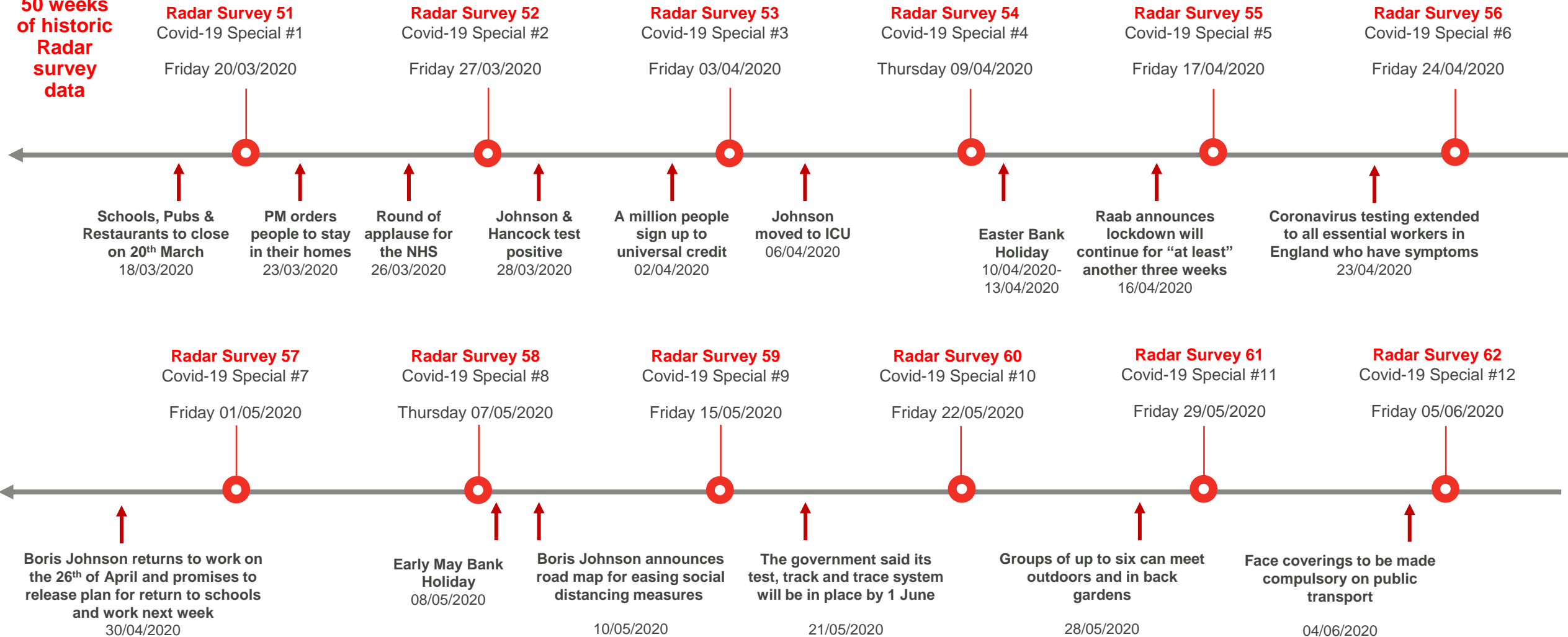


Appendix



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

Radar Survey 70
Covid-19 Special #20
Friday 31/07/2020



Announcement that
Britons in Spain will
have to quarantine for
two weeks on returning
26/07/2020

Radar Survey 71
Covid-19 Special #21
Friday 07/08/2020



Government's Eat Out
To Help Out Initiative
launches
03/08/2020

Radar Survey 72
Covid-19 Special #22
Friday 14/08/2020



France added to UK
Covid quarantine list
14/08/2020

Radar Survey 73
Covid-19 Special #23
Friday 21/08/2020



Bowling alleys, theatres, music
and performance venues and
other culture, sport, leisure and
business sectors reopen
15/08/2020

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



'Eat Out to Help
Out' ends for
most
restaurants

01/09/2020

Radar Survey 76
Covid-19 Special #26
Friday 11/09/2020



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

09/09/2020

Radar Survey 77
Covid-19 Special #27
Friday 18/09/2020



Revised government
restrictions on social
gatherings come into
place

14/09/2020

Radar Survey 78
Covid-19 Special #28
Friday 25/09/2020



PM warns UK to
follow COVID
restrictions or risk
second lockdown

22/09/2020

Radar Survey 79
Covid-19 Special #29
Friday 02/10/2020



Extended local
lockdown
measures in the
North East

01/10/2020

Radar Survey 80
Covid-19 Special #30
Friday 09/10/2020



Boris to announce
tiered approach to
lockdown
measures

12/10/2020

Radar Survey 81
Covid-19 Special #31
Friday 16/10/2020



London moved to
Tier 2 COVID alert
level

15/10/2020

Radar Survey 82
Covid-19 Special #32
Friday 23/10/2020



Greater Manchester and
areas in the Midlands move
to Tier 3

20/10/1010-23/10/2020

Radar Survey 83
Covid-19 Special #33
Friday 30/10/2020



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

31/10/2020

Radar Survey 84
Covid-19 Special #34
Friday 06/11/2020



National lockdown in
England begins

05/11/2020

Radar Survey 85
Covid-19 Special #35
Friday 13/11/2020



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

09/11/2020

Radar Survey 86
Covid-19 Special #36
Friday 20/11/2020



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

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

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

22/02/2021

