

COVID-19 Consumer Impact Report
w/c 08.03.21

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 100 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 250 respondents in the UK between Friday 5th March to Sunday 7th March 2021.



Summary: Children returning to schools corresponds with a drop in confidence in the government, however optimism around post-COVID activities continues to rise

- 01 The **nation are feeling slightly happier (+1ppt) and less anxious (-6ppts) this week**, however, there has been a slight drop in optimism (-4ppts) and satisfaction (-3ppts).
 - 02 Less people report that **money is tight at the moment (-3ppt)**, however optimism around **future business conditions (-6ppt)** has declined this week.
 - 03 After a significant rise in **confidence in the government** last week, this metric has declined slightly in the last 7 days (dropping 3ppts) with people voicing their concerns over children returning to school this week.
 - 04 **Worry is the most prominent emotion over children returning to schools** for the nation, but parents are significantly more likely than average to feel happy about it.
 - 05 Optimism as a result of **COVID-19 vaccinations** continues to rise, with **two thirds** now optimistic about **returning to activities** that were halted.
 - 06 As the vaccine roll-out continues and people look ahead to June, interest in **booking a holiday** continues to rise, as well as **researching flights**, both up 3ppts this week.
-







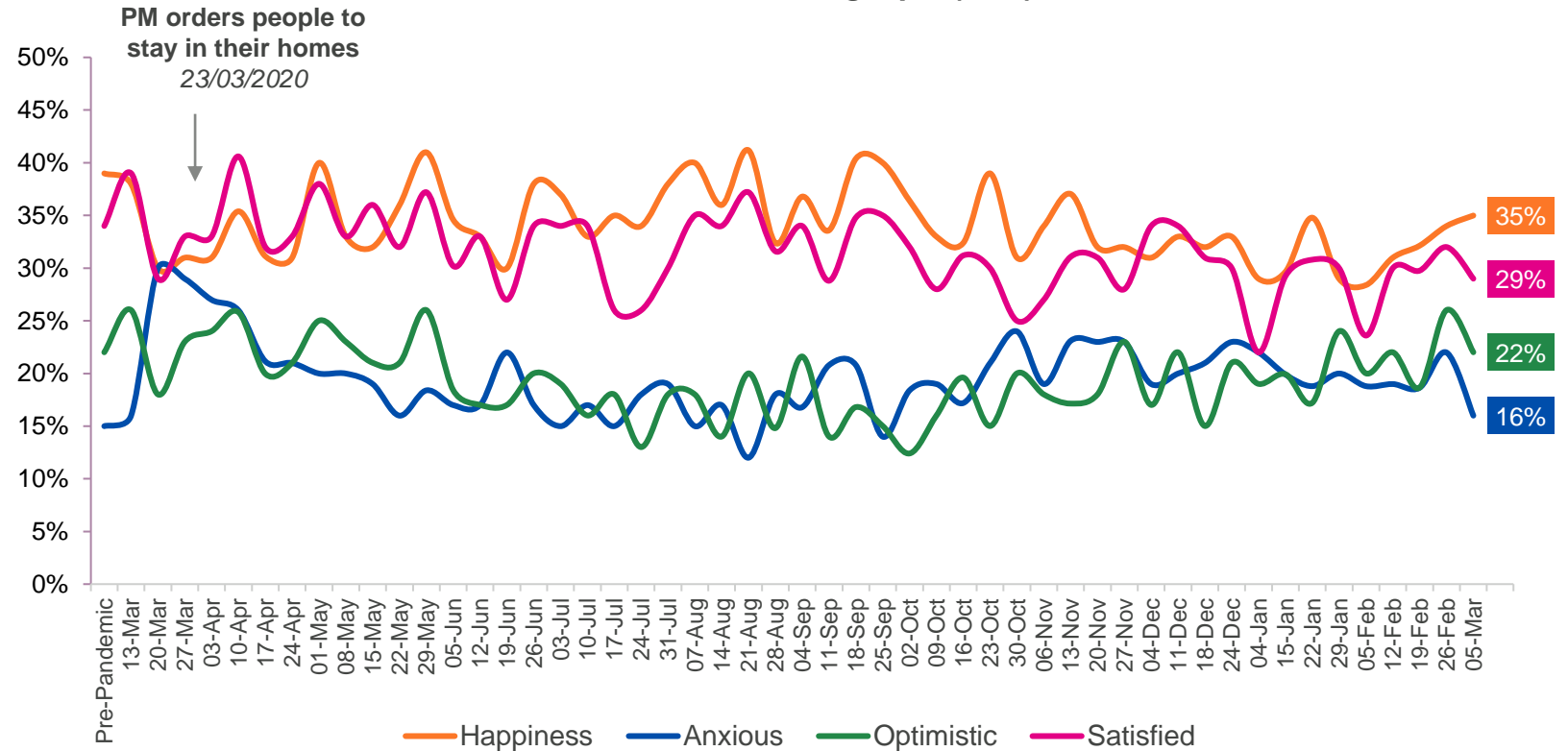
**Life satisfaction,
optimism & consumer
confidence**



Happiness levels have increased again, and anxiety has dropped significantly, however people are feeling less optimistic this week

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

-  **Happiness levels have increased 1ppt this week from 34% to 35%**
-  **Optimism has decline 4ppts from 26% to 22% in the last 7 days**
-  **Satisfaction levels have decreased from 32% to 29%**
-  **Anxiety levels have also decreased this week, from 22% to 16%**





Although less people report money is tight at the moment, optimism around future business conditions has dropped this week

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



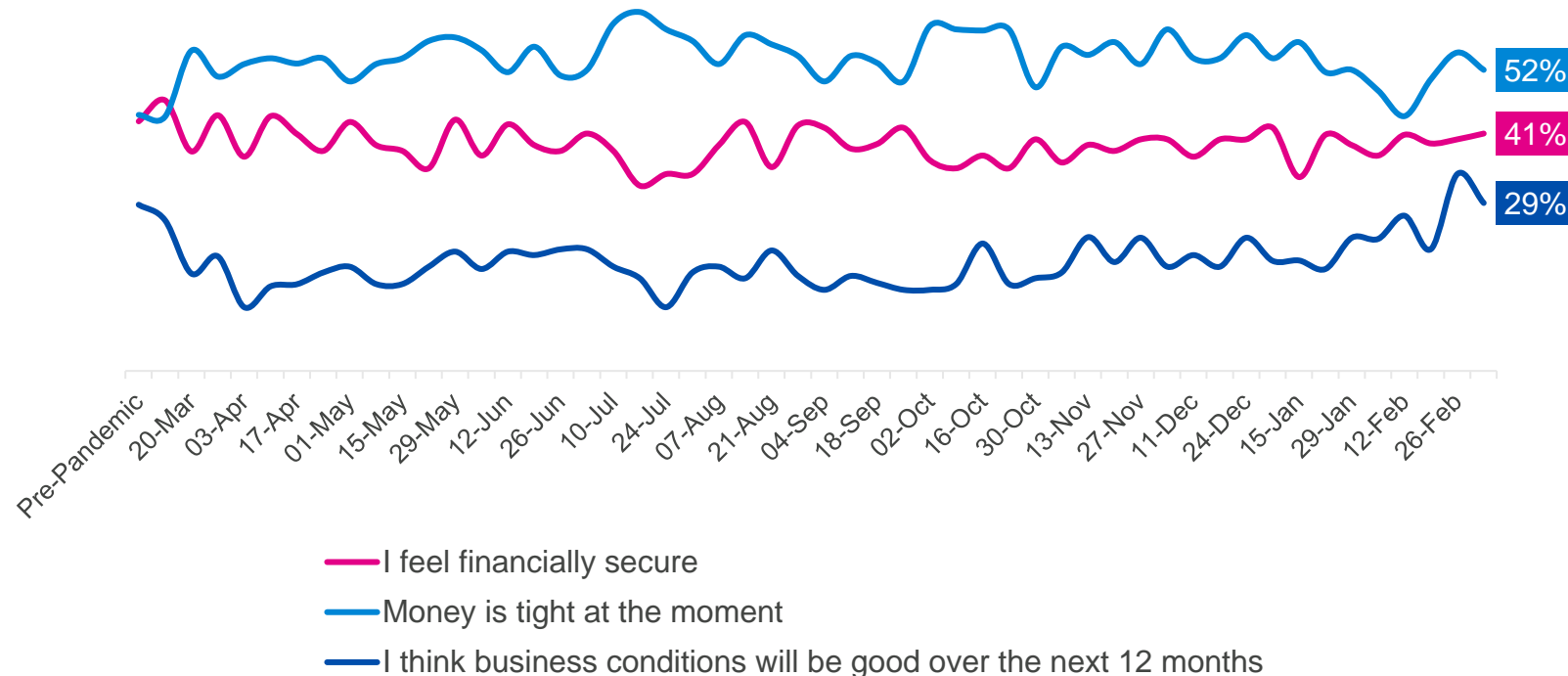
There has been a 1ppt incline in the percent of people feeling financially secure, from 40% to 41%



Those stating that money is tight at the moment has decreased 3ppt from 55% to 52%

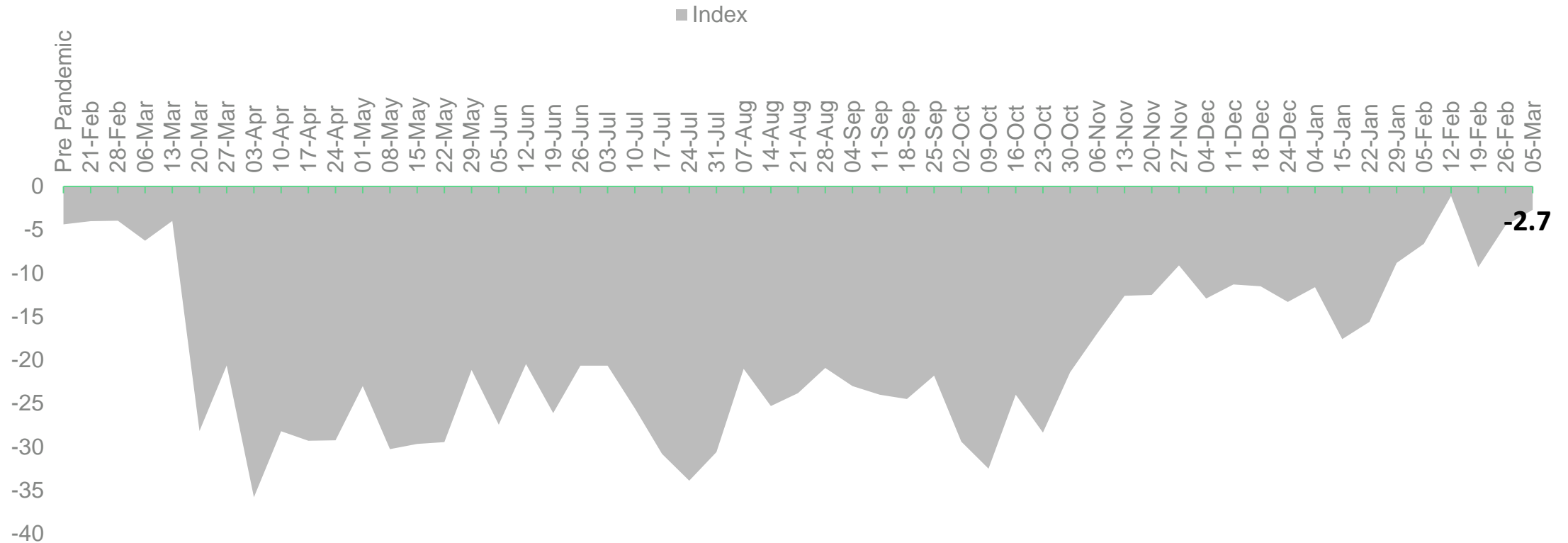


There has been a 6ppt decrease in confidence in future business conditions, down from 34% to 29%





Despite lower levels of optimism for future business conditions, Consumer Confidence has increased this week, up from -4.5 to -2.7



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.*



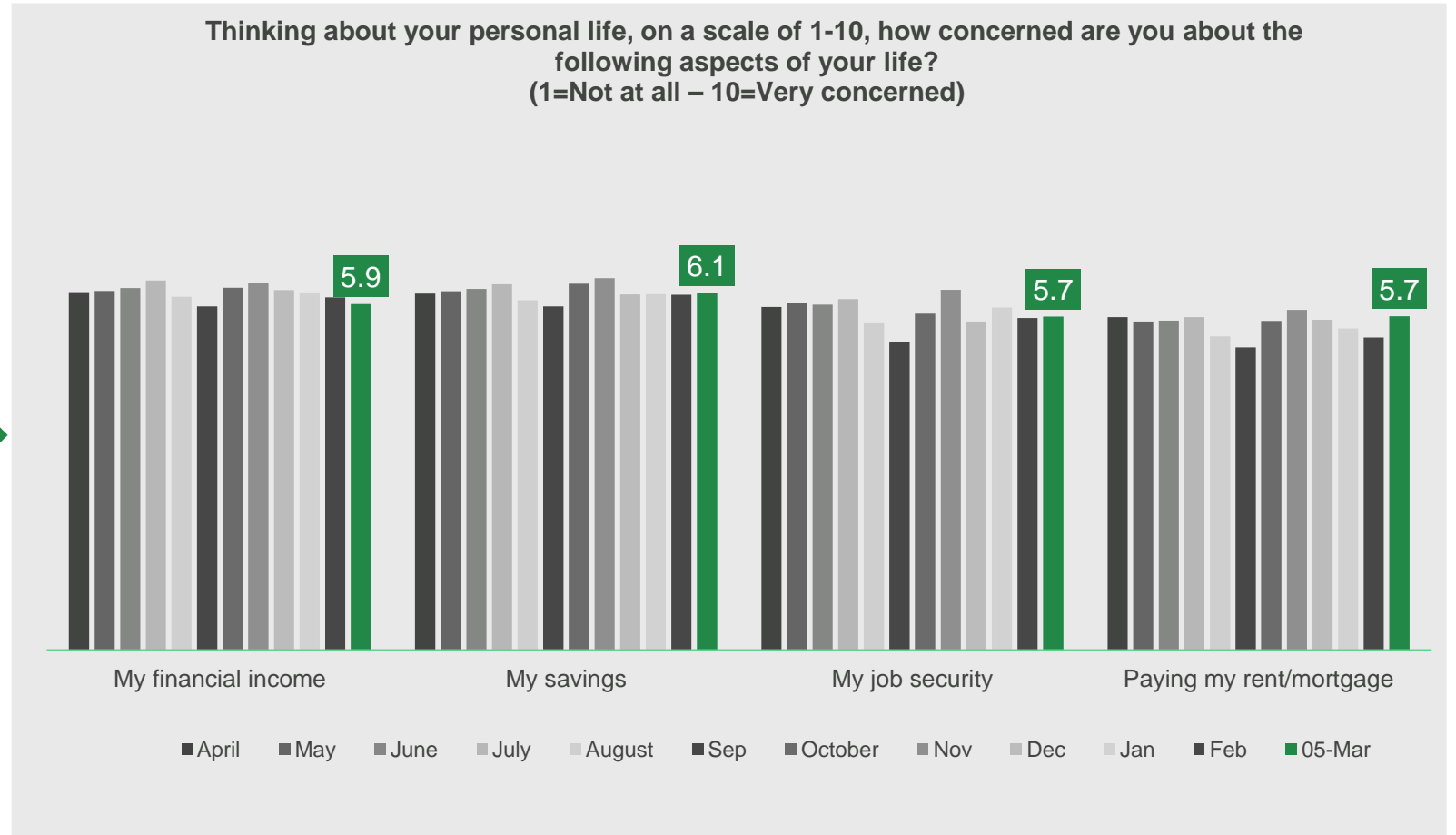
Financial concerns have remained relatively stable, with the exception of paying rent/mortgage

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

4% of households contain someone that has had their **salary reduced** since the COVID-19 outbreak

7% of households include someone that has **been made redundant** since the COVID-19 outbreak began

72% say that their employer has been **supportive** during the COVID-19 outbreak

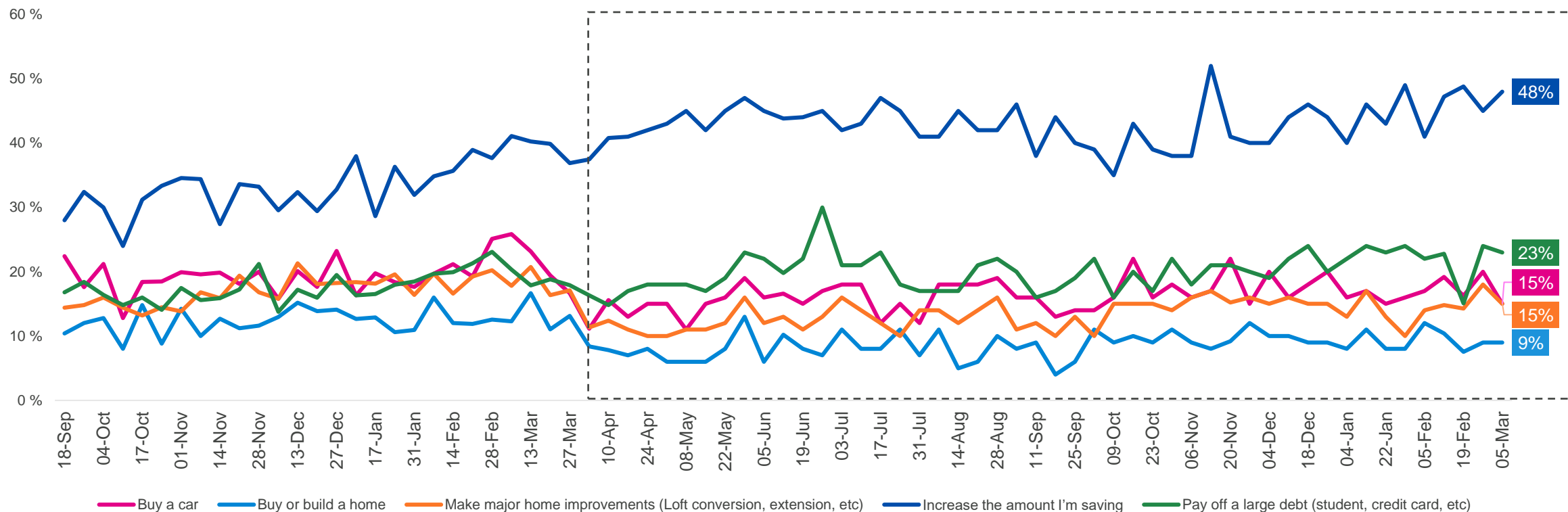




Intent to increase savings has increased 3ppts this week as interest in other big-ticket items such as home improvements or cars has declined

The percent who say they intend to pay off a large debt has dropped slightly this week by 1ppt, from 24% to 23%

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, 03/05: 250

Confidence in Government & Broad Concerns



After a significant rise in confidence in the government last week, this metric has declined slightly in the last 7 days (dropping 3ppts)

There remains concern that allowing children back to school will have a negative impact on progress:

“I’m not confident because the last time kids went back to school it got worse”

“I think sending children back to school is increasing the risk of Covid”

“The government constantly making mad decisions, not easing opening schools just letting everyone come back at the same time. Should be changes such as a year group a day not 1000 kids all in at once.”

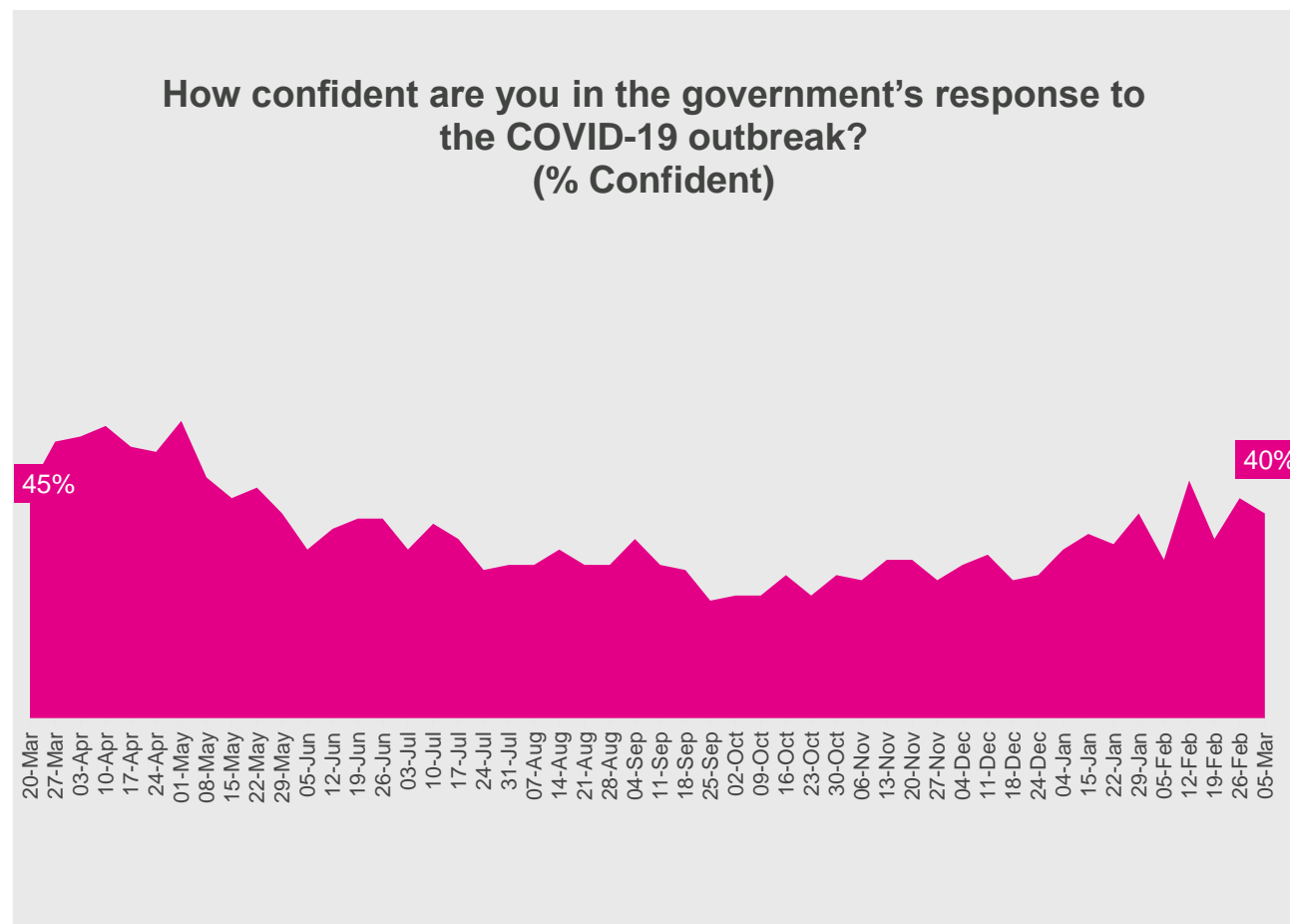
“All the children returning to school will cause another wave.”

Although the vaccine roll out and announcement of a slow lifting of restrictions is improving confidence for some:

“Now the vaccines are available I feel we’re at last on the right track so long as the public tow the line until we’re all fully vaccinated”

“The government has recently taken a more realistic and cautious approach to releasing restrictions.”

“Since the start of the 3rd lockdown the governments approach has improved greatly, and I am confident the easing of restrictions will be done the right way this time”

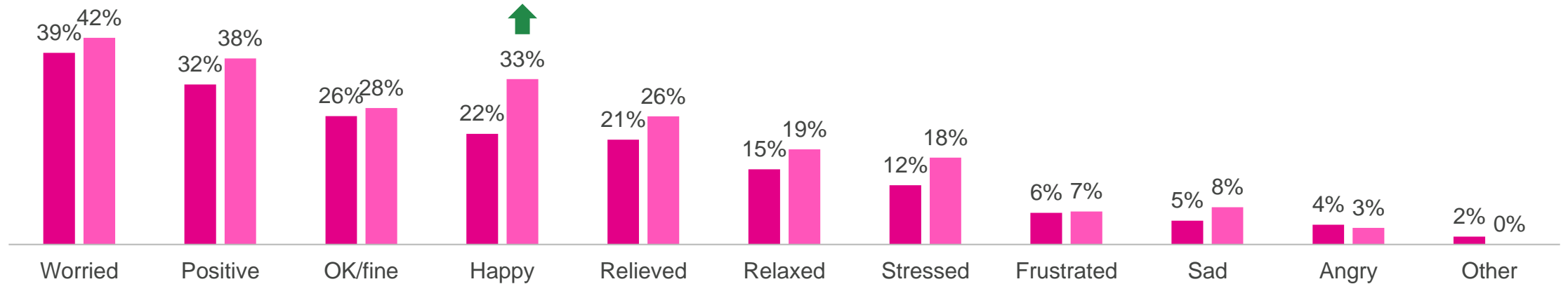




Worry is the most prominent emotion over children returning to schools but parents are significantly more likely than average to feel happy about it

Which of the below best describes your thoughts / feelings towards children returning to schools?

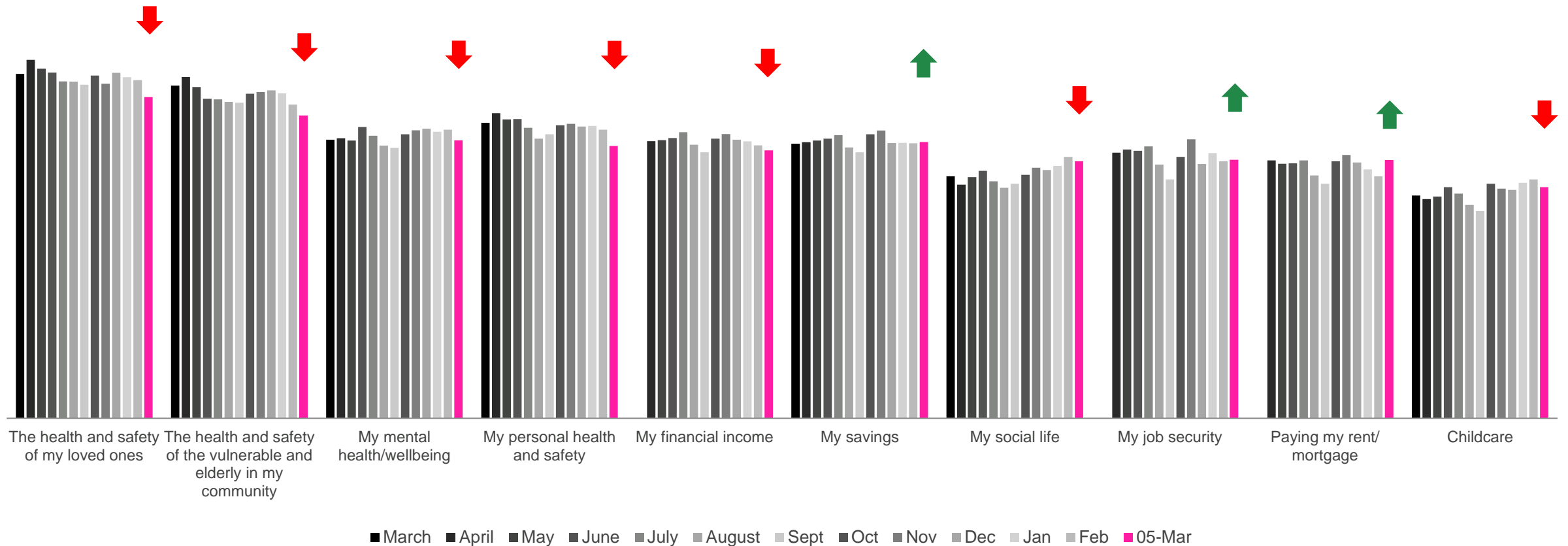
■ Total ■ Parents





Personal life concerns have decreased across the board, with the exception of concerns around savings and paying rent/mortgage

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)



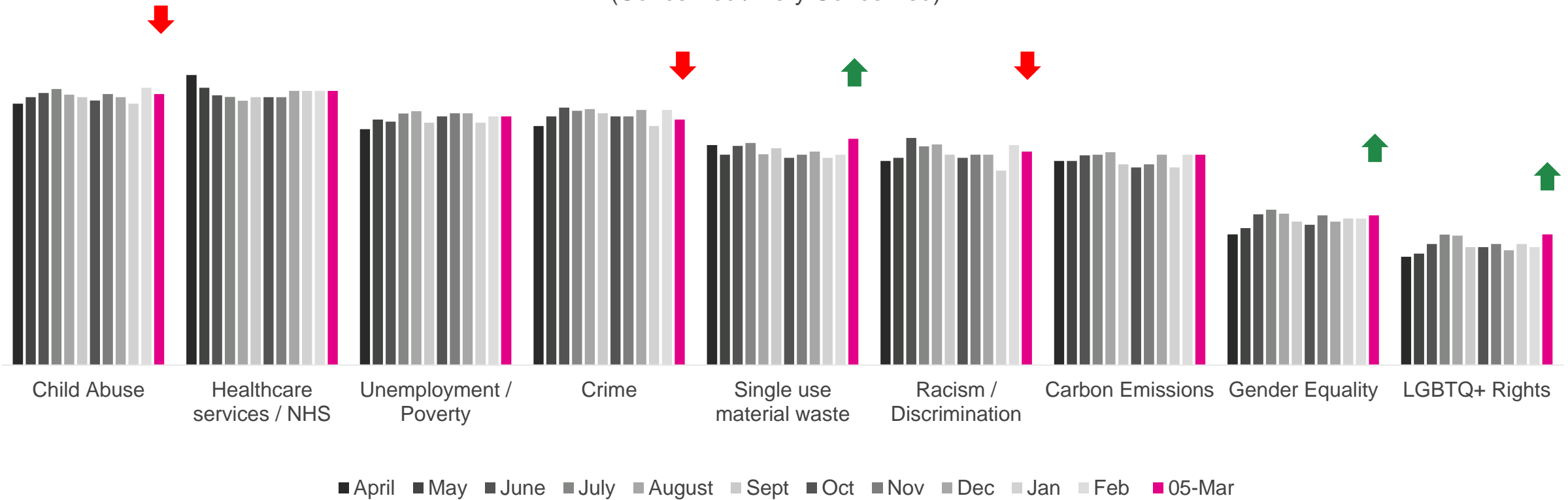
Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250,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



Concerns over Gender Equality and LGBTQ+ Rights have increased in the last 7 days

Concerns over Healthcare services and the NHS have stabilised from Dec to Jan at 86%

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



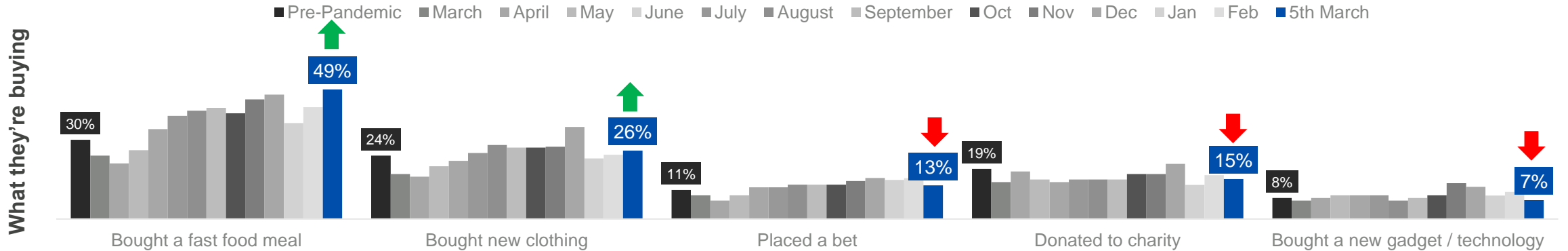
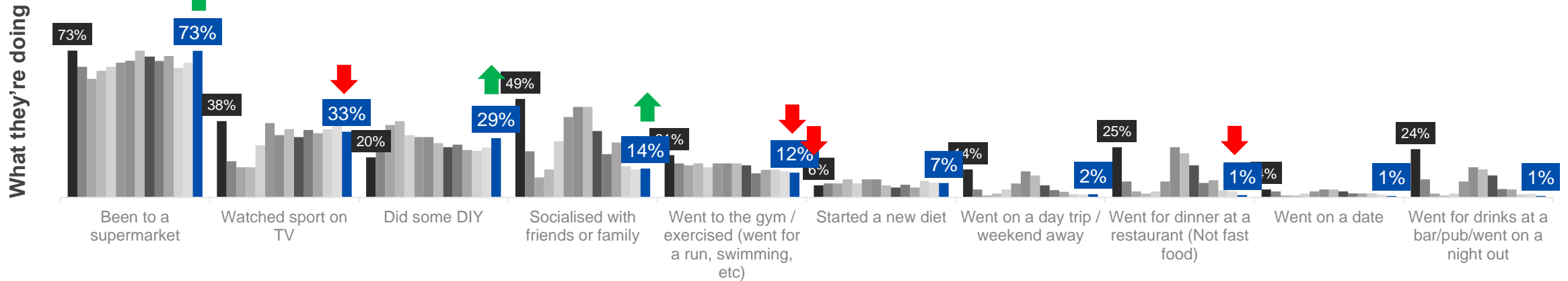
Changes in Behaviour



This week we have had more people treat themselves to fast food meals and new clothing

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

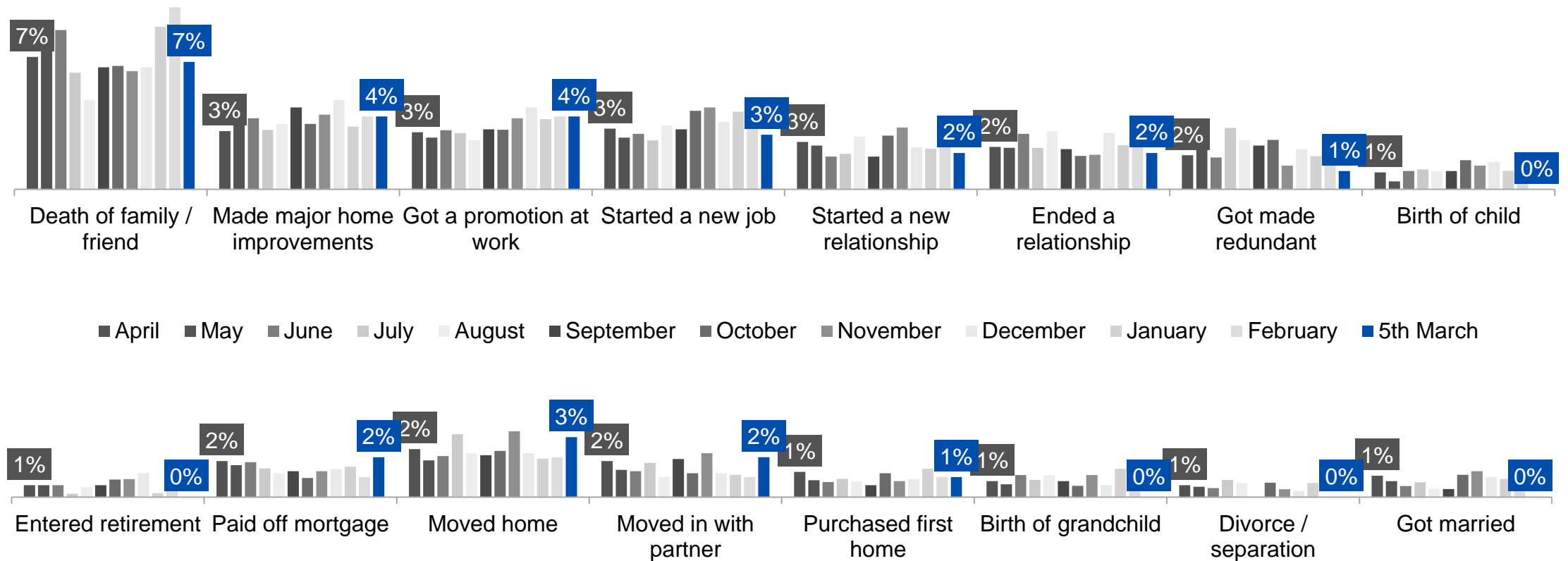


Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 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, 05/03:251.



For the first time in four weeks, we have seen the number of people experiencing the death of a family / friend in the last week decrease

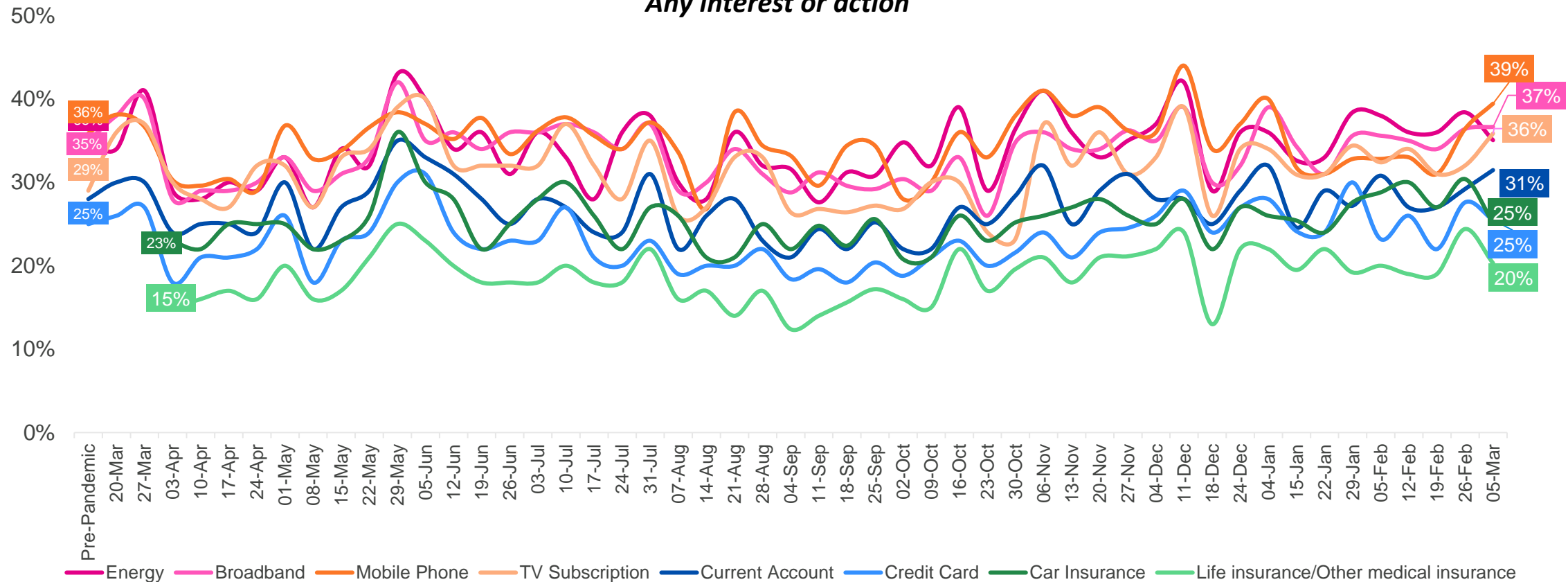
% who have done or have had the following happen to them in the last 4 weeks?





This week we have seen an increase in those interested in buying mobile phones and TV subscriptions

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



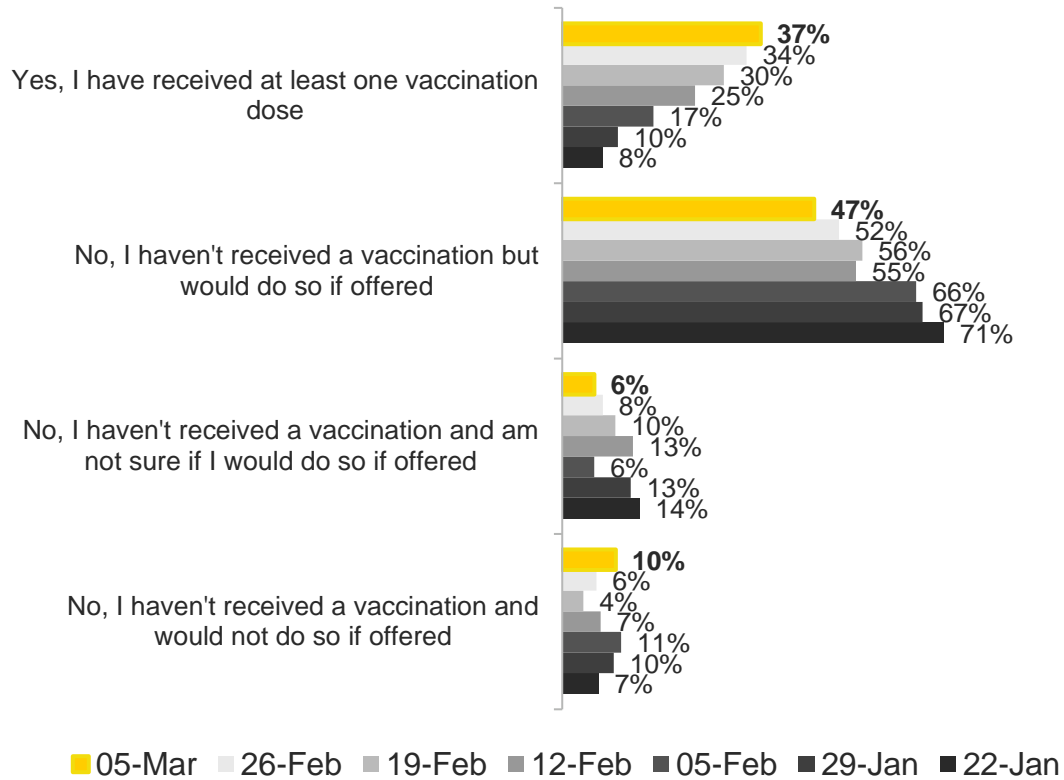
Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 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, 06/11:251, 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?



Many are concerned over the potential side effects and long term impact, which is creating a barrier to them considering receiving a dose

“It’s a wait and see situation for me - I need to be reassured that it’s highly unlikely that I will suffer from side effects.”

“There has been a lot of controversy surrounding the vaccination and it worried about the side effects and possible future consequences”

“Think it has been rushed and don’t know enough about it and long term effects in future”

“Covid is a common flu and this whole circus is what our politicians have provided us with, and apart from that nobody gives me a guarantee that there will be no side effects.”

Others feel as though they already have enough to protect them, and don’t need the vaccine

“The measures in place are enough to protect me. Coughs and sneezes spread diseases. Learnt this as a CHILD”

“I don’t trust it and I’m already young and healthy I don’t want anything mixing in my body”

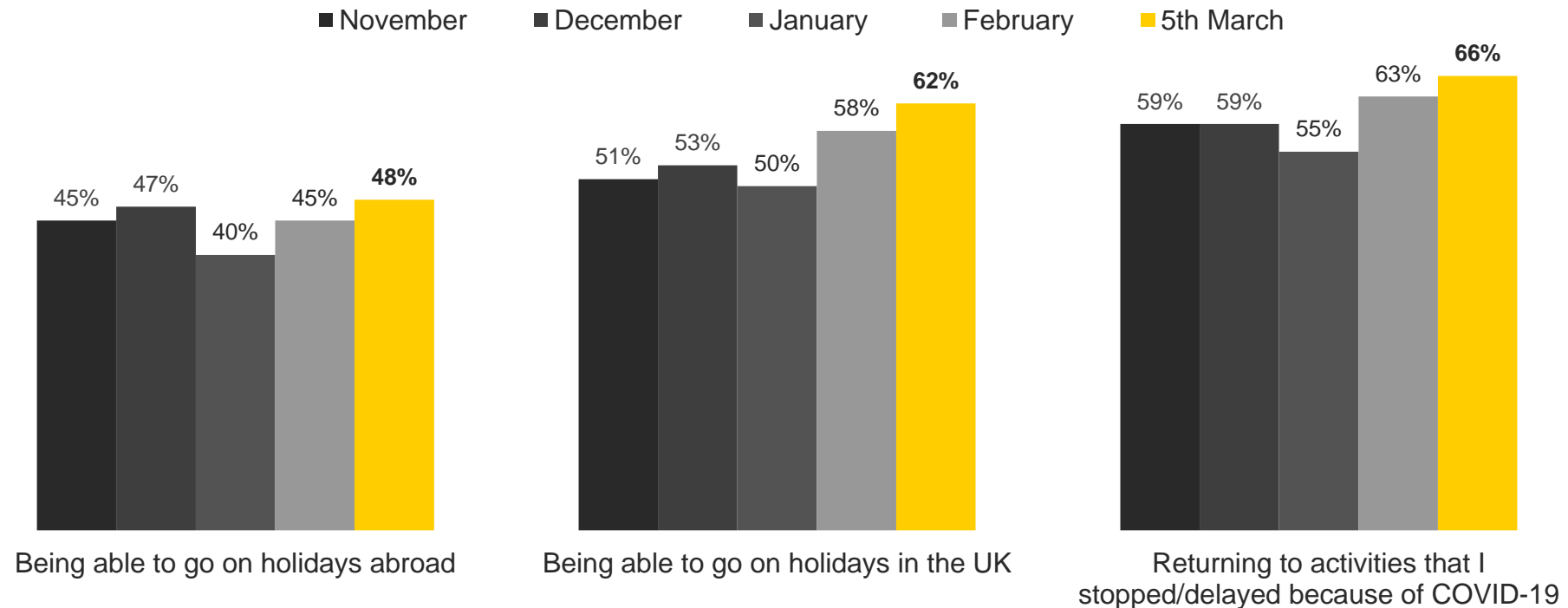
“I am a healthy 42 year old that has no underlying health issues, I have never smoked and I do lots of cardio fitness. Because of this I feel that I don’t need the vaccine because covid won’t affect me.”

“I don’t go out enough”



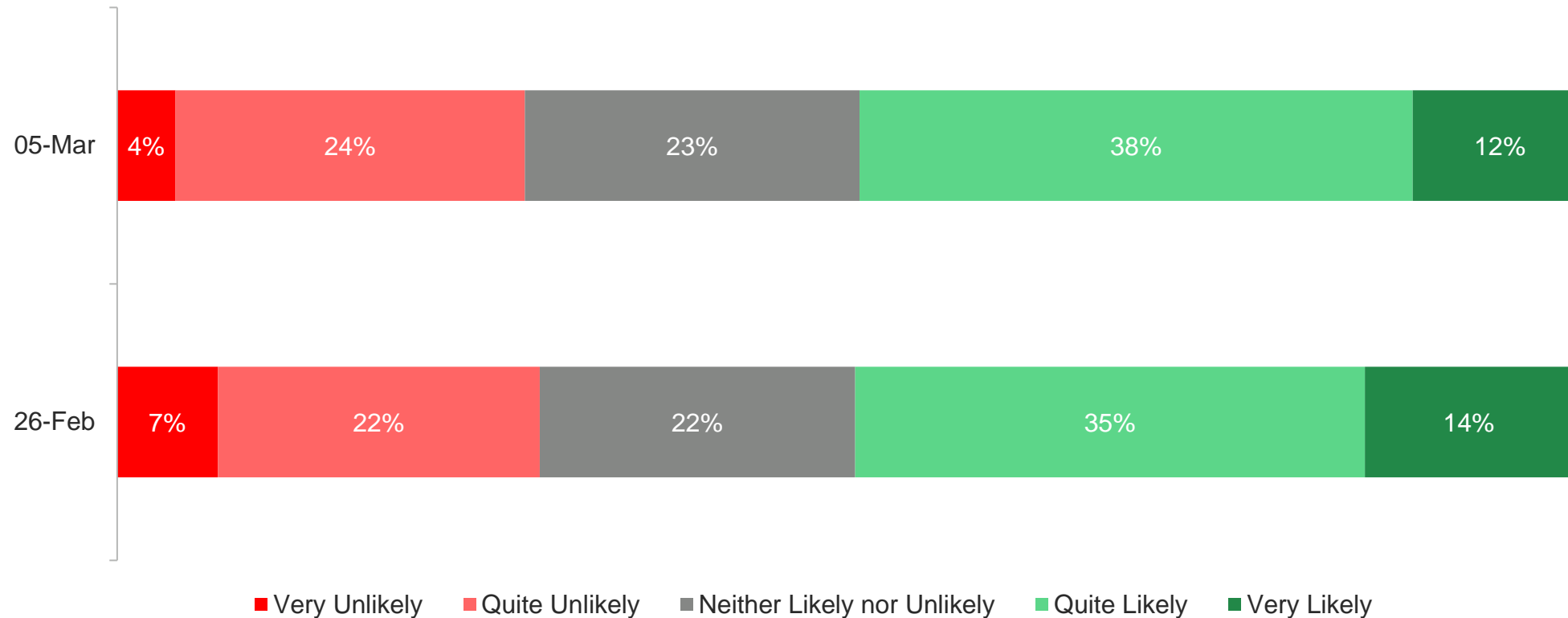
Optimism as a result of COVID-19 vaccinations continues to rise, with two thirds now optimistic about returning to activities that were halted

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



Half of the nation continue to predict that all current national lockdown restrictions will be lifted on 21st June

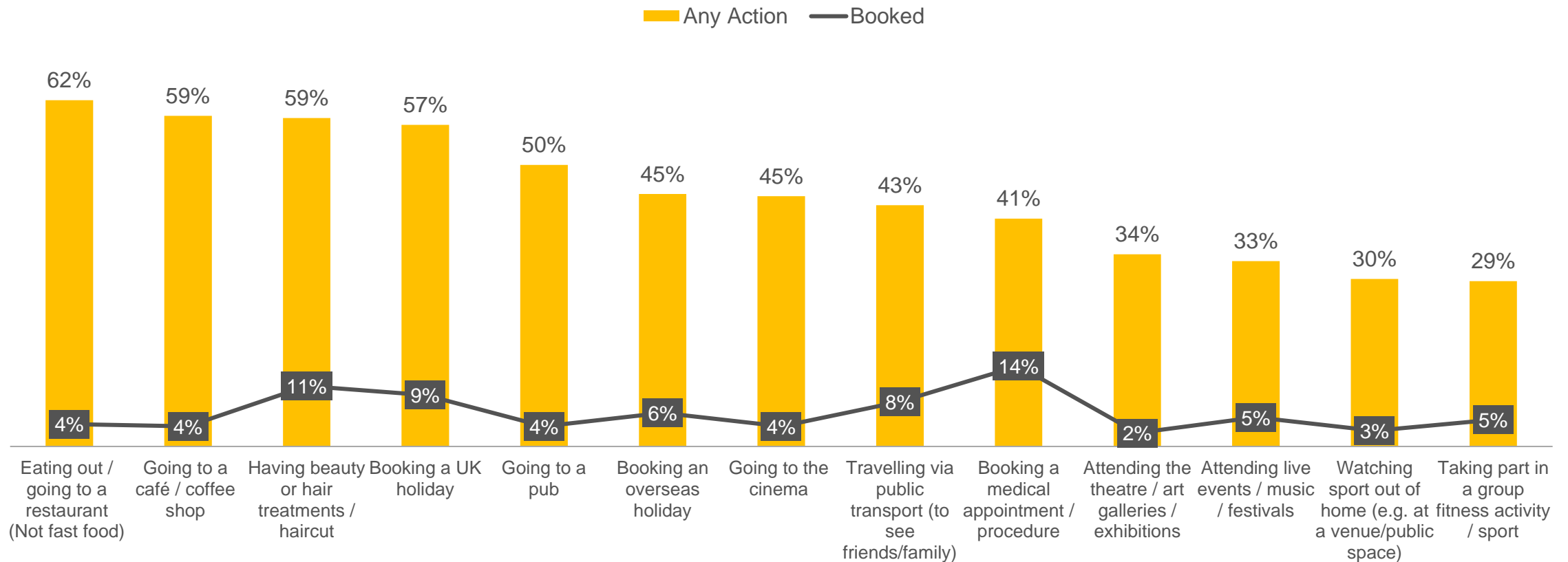
How likely do you think it is that all current national lockdown restrictions in England will be lifted on 21st June 2021?





Although eating out is the most researched activity, few have booked anything yet. Almost 1 in 10 have booked a UK holiday.

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?

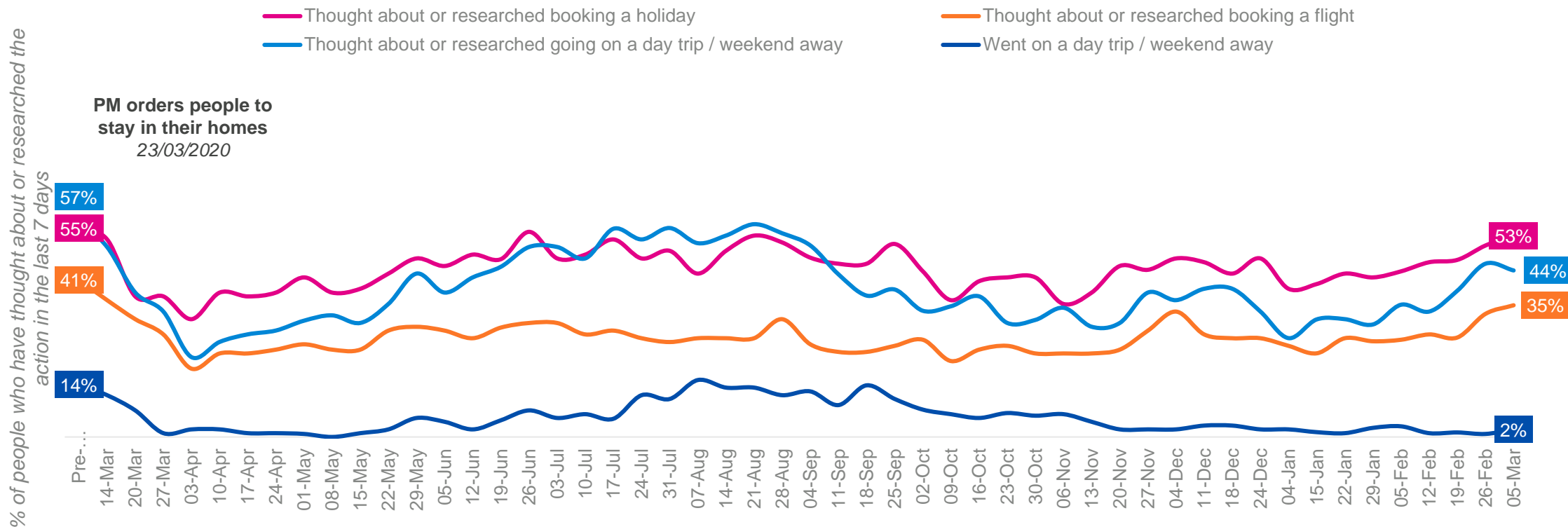




Interest in booking a holiday continues to rise, as well as researching flights

Interest in day trips has dipped slightly this week, but still remains relatively high at 44% showing an interest in this kind of booking.

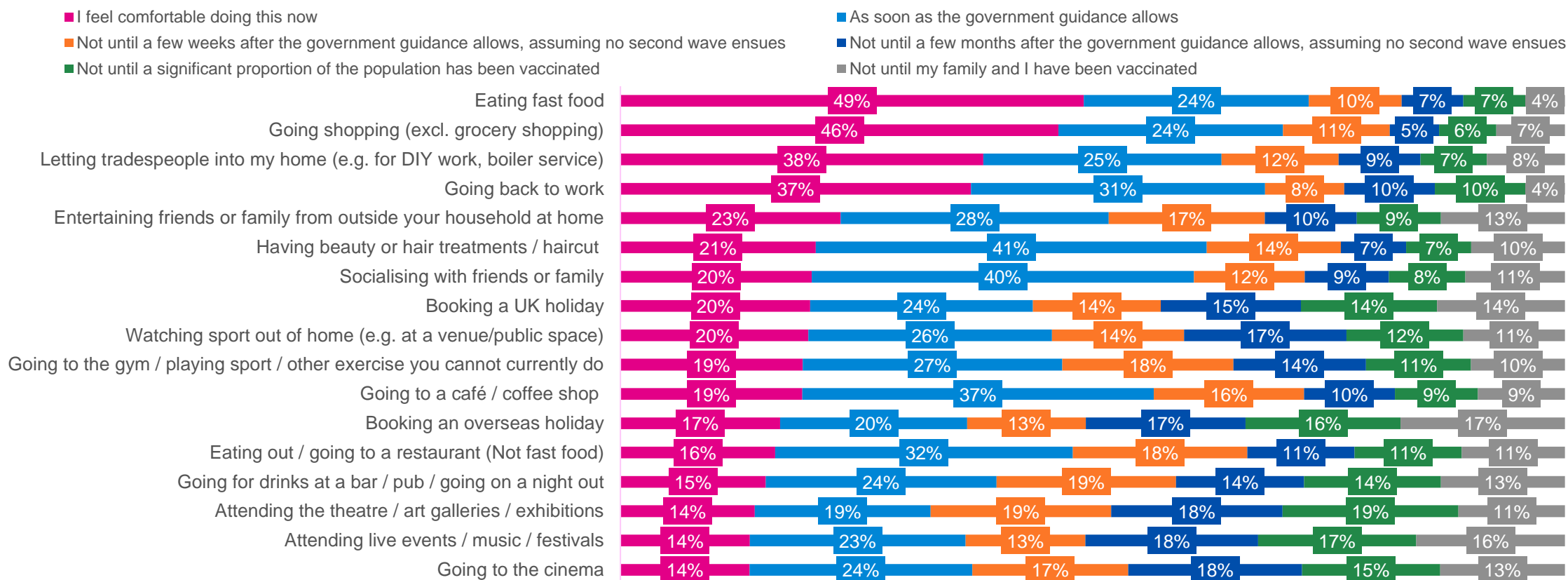
Looking at the different activities listed below, in the past 7 days which have you thought about and or researched if at all?
Which of the below, if any, have you done or have happened to you in the last 7 days? – Went on a day trip



We can see further increases in the amount of people who currently feel comfortable doing most activities this week, as well as increases in comfort once restrictions are lifted

There has been a 7ppt increase in the percentage of people that feel comfortable entertaining friends and family from outside your household at home

When would you feel comfortable doing the following again?

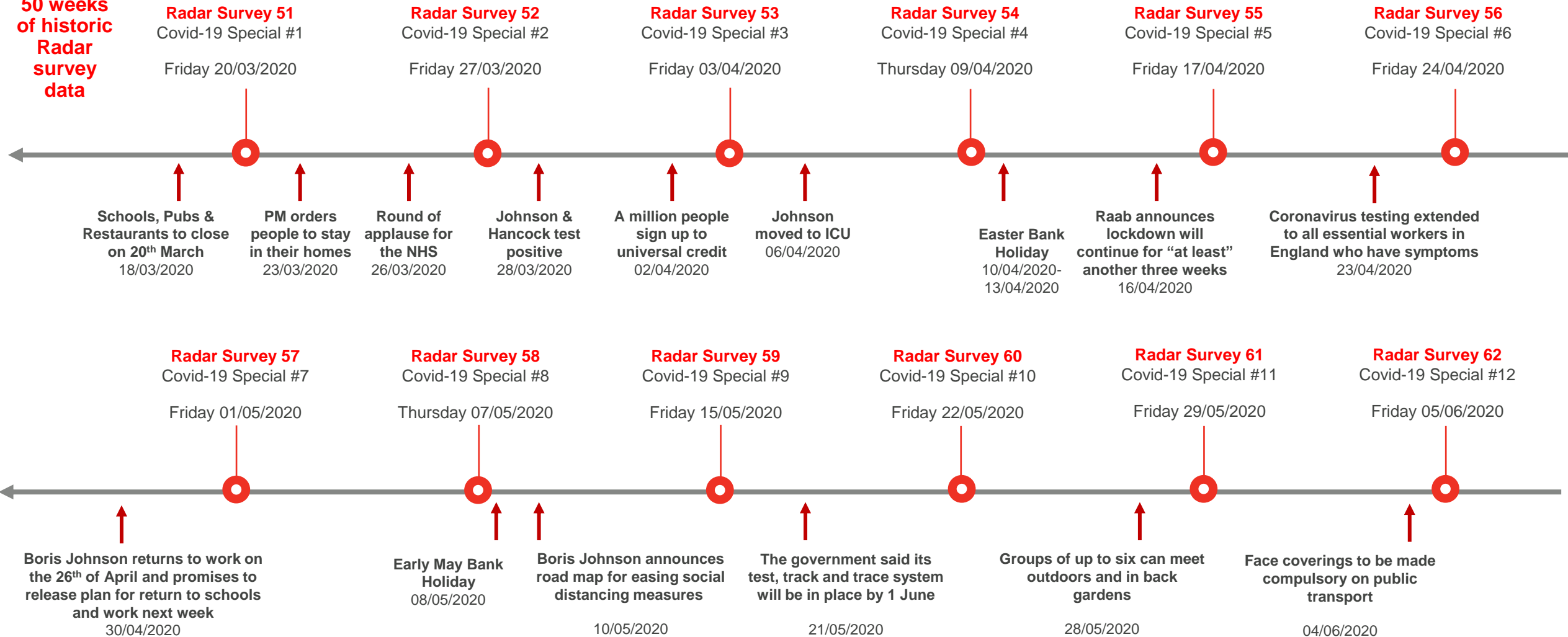


Appendix



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

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

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

22/02/2021

Children return to schools

08/03/2021

