

COVID-19 Consumer Impact Report
w/c 19.04.21

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 106 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 16th April to Sunday 18th April 2021.



Summary: As we enter Step 2 of the road out of lockdown, there's been a return to out of home venues and people are feeling happier but more financially squeezed this week

- 01** There has been **positive momentum for the happiness levels** of the nation since the start of February 2021, rising by 6ppts this week after a dip post-bank holiday last week, and **optimism remains higher than pre-pandemic levels despite a 3ppt drop this week**
 - 02** **The nation's financial outlook has experienced a slight downturn this week**, with declining levels of financial security and consumer confidence in addition to increased concerns over personal finances, but optimism remains and confidence in future business conditions is 19ppts higher than 12 months ago
 - 03** As we enter step 2 of the road out of lockdown, **confidence in the government has improved by 2ppts this week**, continuing an upward trend since the start of 2021, as people begin to see progress from **falling case numbers and the vaccine rollout**
 - 04** The return of hospitality venues has seen **12% of people going out for drinks in the last week (+7ppts)** and **9% going out for dinner at a restaurant (+3ppts)** following the reopening of pubs/bars and restaurants with outdoor seating
 - 05** **The percentage of people socialising remains high**, despite a decline from 43% to 41% this week, and **more people feel comfortable doing so (+6ppts this week)** as people continue to utilise the easing of lockdown
 - 06** Post the reopening of non-essential retail, **over half of the population feel comfortable going shopping**, there's a **spike in those comfortable having a beauty or hair treatment** following the reopening of hairdressers/salons/barbers
-

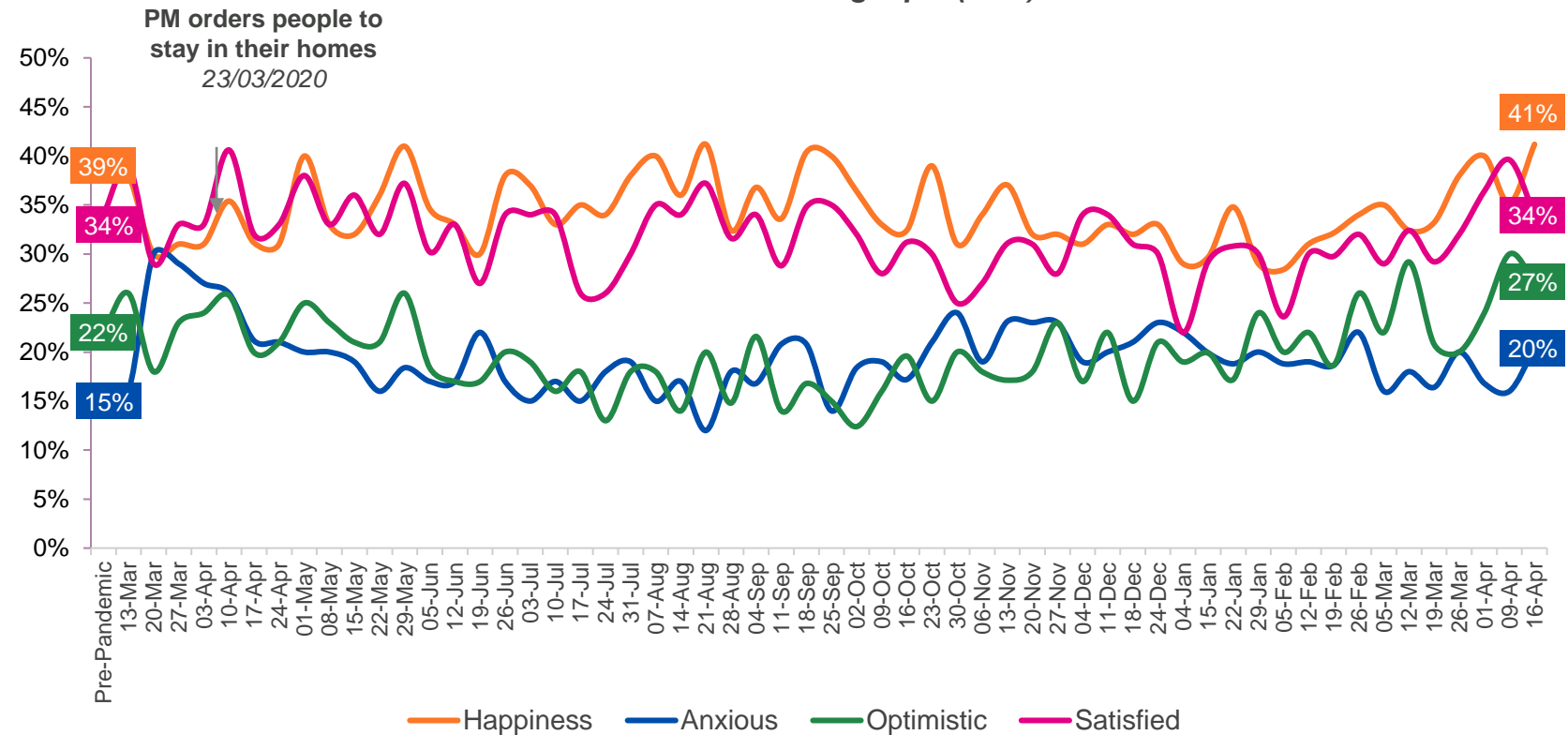


**Life satisfaction,
optimism & consumer
confidence**



There has been positive momentum for the happiness levels of the nation since the start of February 2021, rising by 6ppts this week after a dip post-bank holiday last week, and optimism remains higher than pre-pandemic levels despite a 3ppt drop this week

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



↑ Happiness levels recovered after post-Bank Holiday blues last week, increasing by 6ppts from 35% to 41% this week – showing a positive trajectory following a dip through January

↓ Optimism has dipped this week, declining by 3ppts from 30% to 27%, but remains considerably higher than pre-pandemic levels

↓ Life satisfaction levels have decreased by 6ppts this week from 40% to 34%

↑ Anxiety levels have risen this week, increasing by 4ppts from 16% to 20%



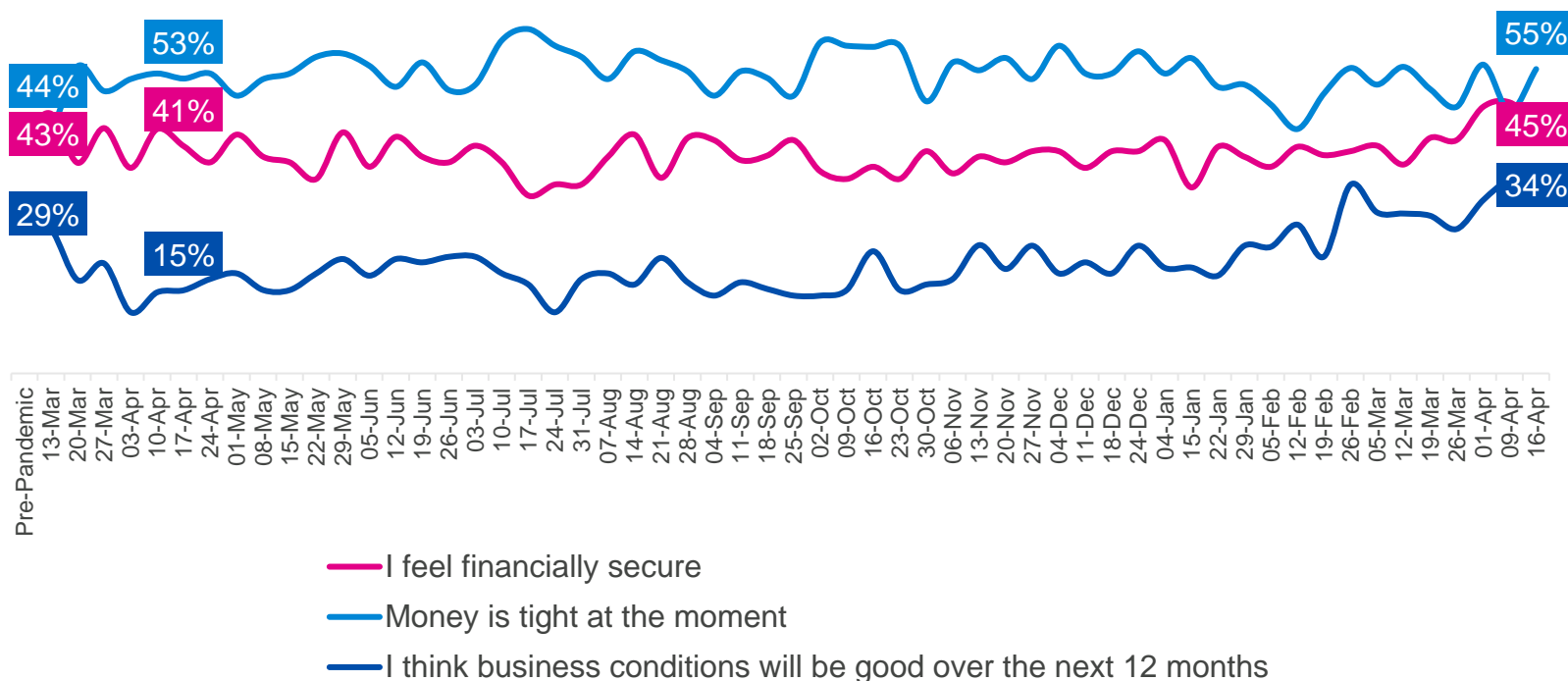
Financial security has dipped following a brief uplift last week but confidence in future business conditions remain positive, 19ppts higher than 12 months ago despite a 1ppt decline this week

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 4ppt decline in the percentage of people feeling financially secure dropping from 49% to 45%

↓ The percentage of people stating that money is tight at the moment risen by 8ppts this week after a brief decline last week, increasing 47% to 55% this week

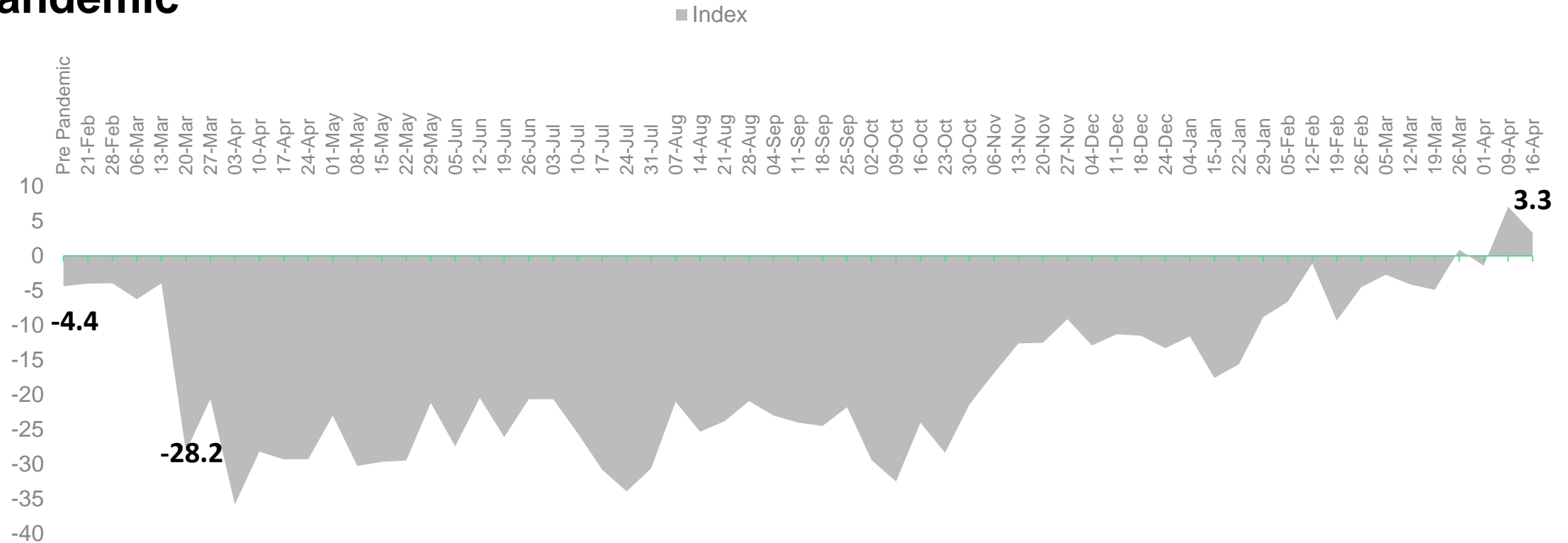
↓ Confidence in future business conditions remains high, despite a 1ppt decline this week, dropping from 35% to 34% in the last week



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, 16/04:250



Consumer confidence has dropped from 7.1 to 3.3 in the last 7 days, but remains more positive than any point in the first 12 months of the pandemic



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.*



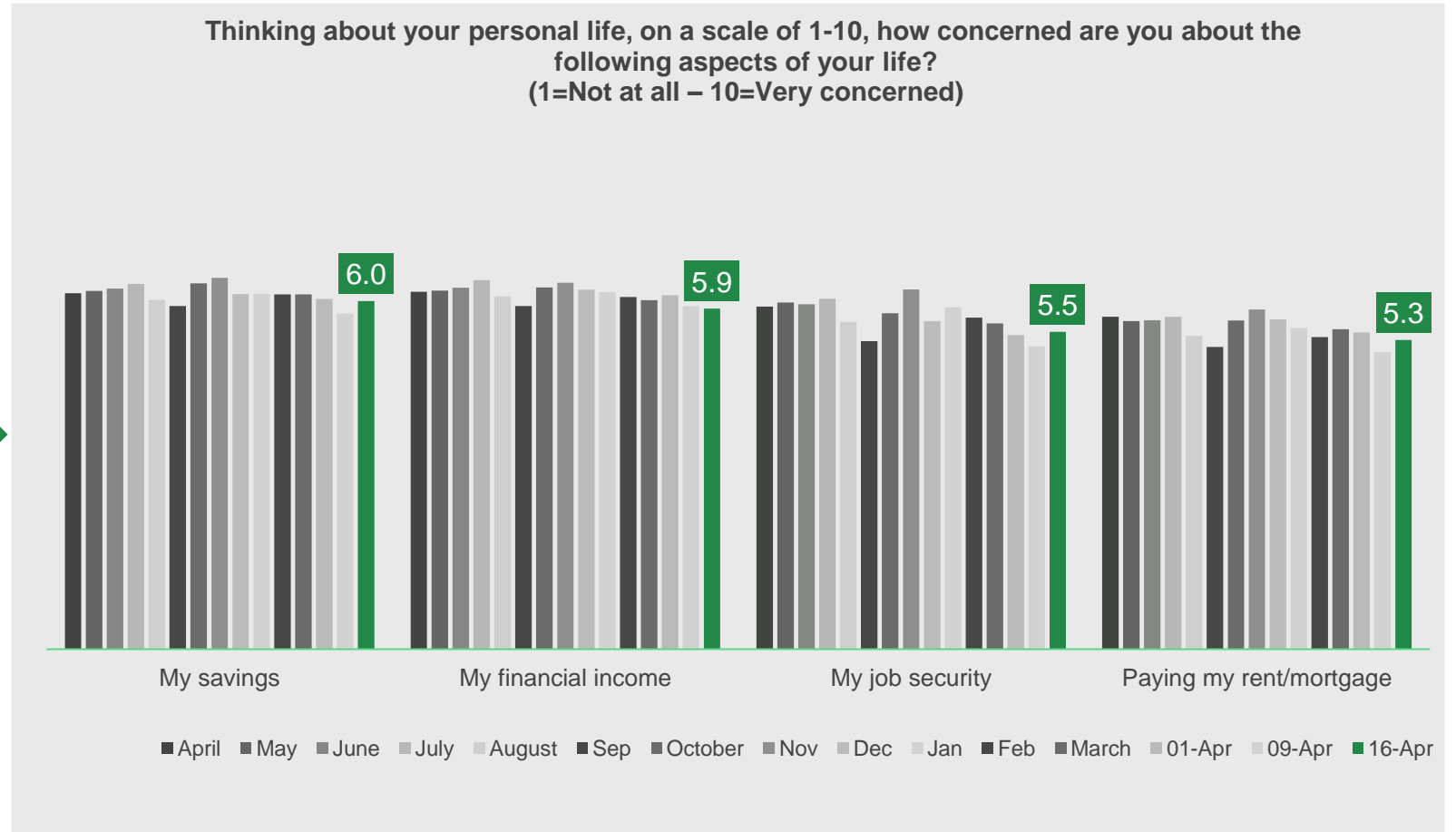
After declines in personal financial concerns last week, there have been increased levels of concern in the last 7 days

12% of households have someone that has been **furloughed**

4% 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

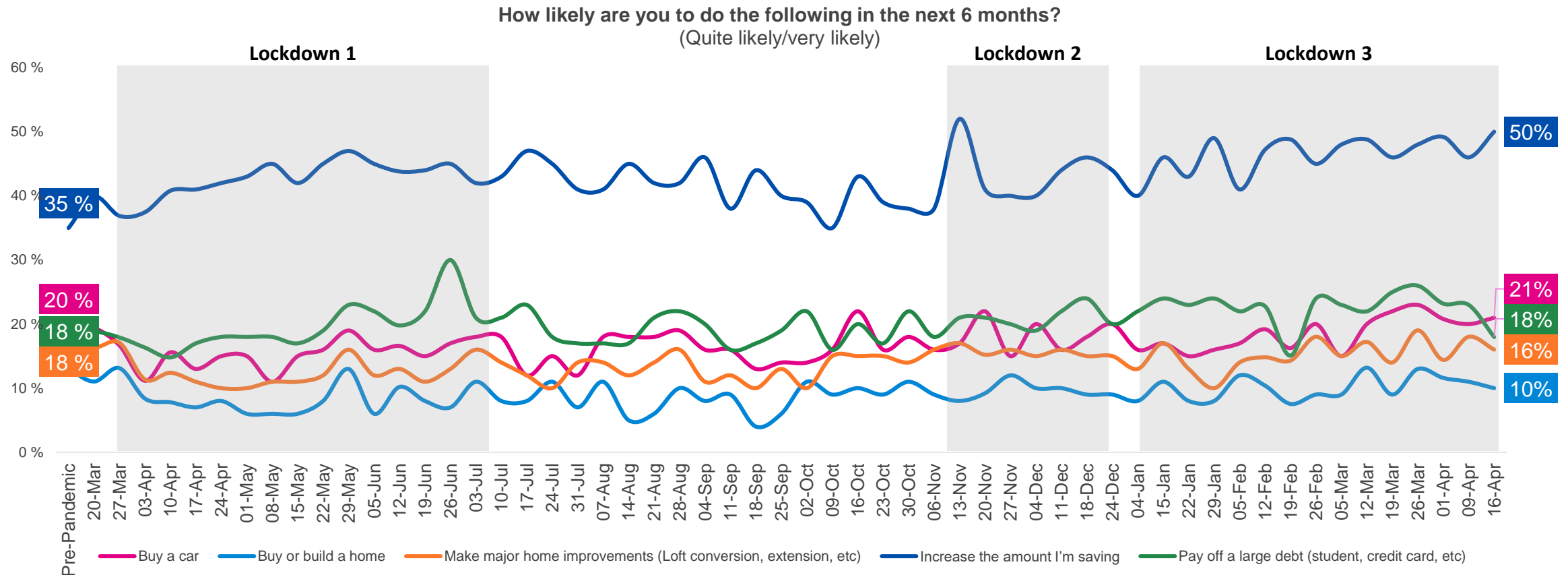
68% say that **their employer has been supportive** during the COVID-19 outbreak





Amidst increased financial uncertainty, intent to increase savings remains high, with half the population intending to do so following a 4ppt increase in the last 7 days

The percentage of people that report a likelihood to pay off a large debt in the next 6 months has dropped by 5ppts this week, declining from 23% to 18% in the last 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: 250, 12/03:250, 01/04:250, 09/04:250, 16/04:250

Confidence in Government & Broad Concerns



Confidence in the government has improved this week, continuing an upward trend since the start of 2021, as people begin to see progress from falling case numbers and the vaccine rollout

As the easing of lockdown restrictions continues, people are seeing tangible progress in the government's response to the pandemic:

"Statistics seem to be heading in the right direction."

"They seem at last to be on top of things"

"we are getting there slowly, with the vaccinations for everyone, the cases are falling."

"Slowly going in right direction. Only time will tell be in good place come September"

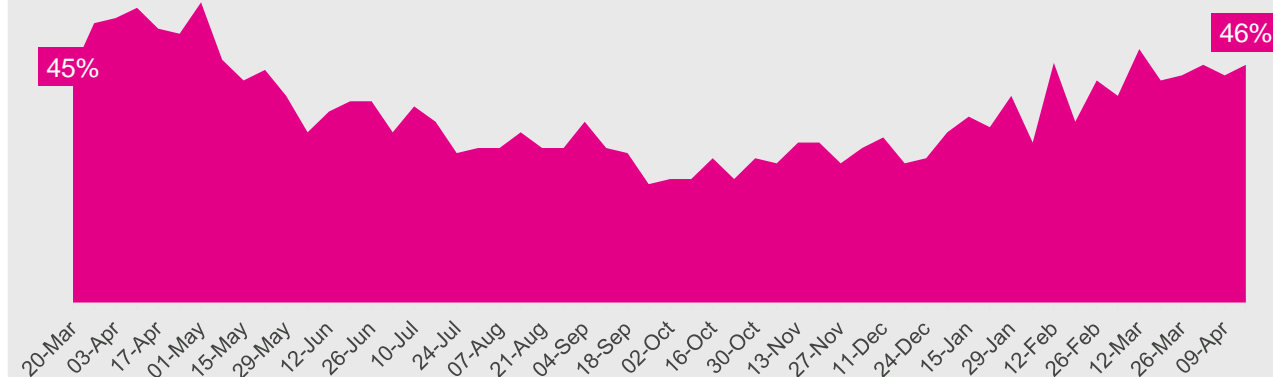
"Initially poor but vaccine roll out great"

The furlough scheme remains a boost for public confidence in the government:

"There is also regular information and advice. Financial support has been given to businesses and self employed."

"i feel the government has done well during this unprecedented time with all there funding for jobs and services"

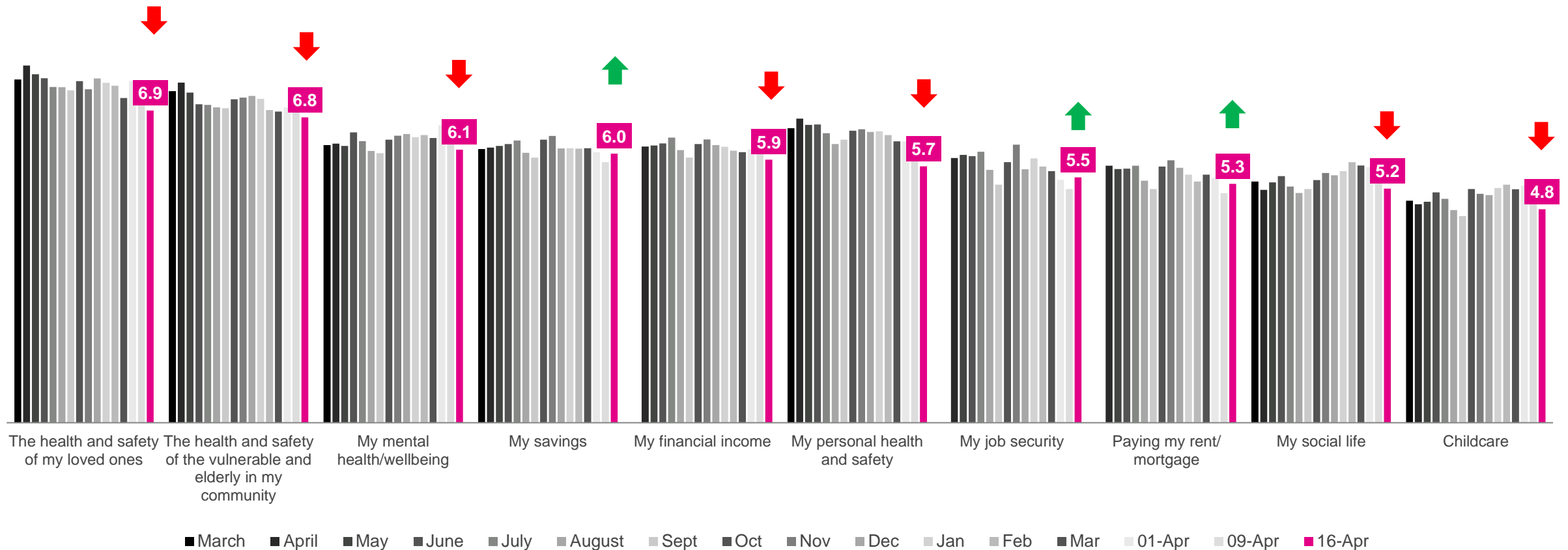
How confident are you in the government's response to the COVID-19 outbreak?
(% Confident)





Though financial concerns have increased this week, concern over the wellbeing of ourselves and others has declined

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)



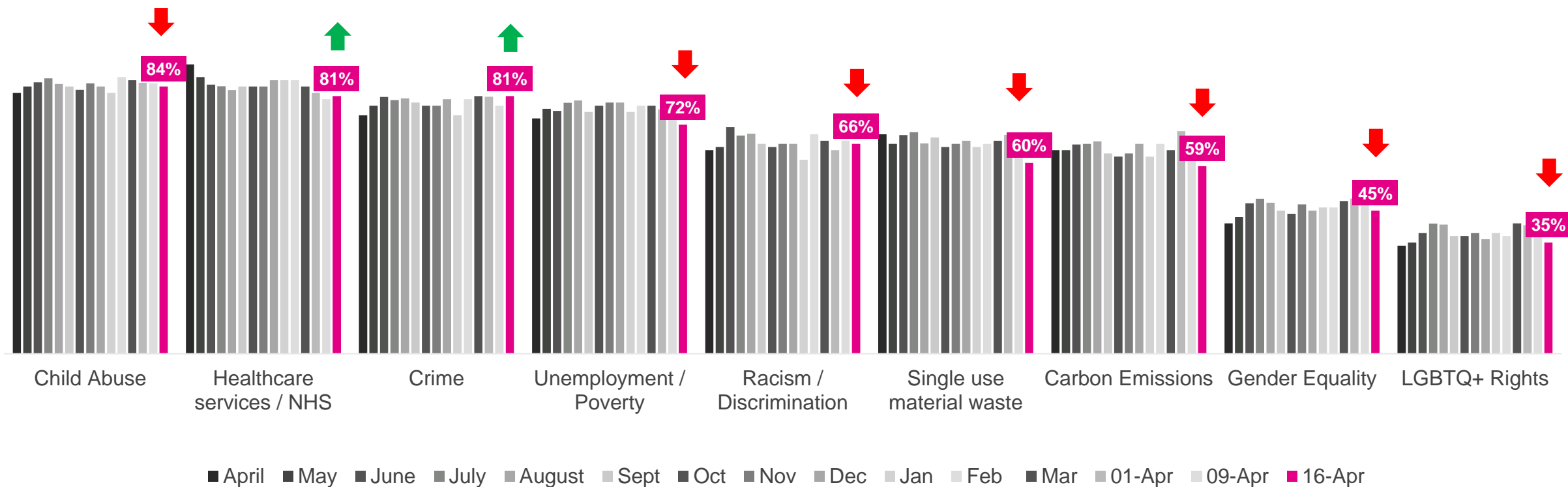
Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500, 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 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, 16/04:250



Concern over crime has increased this week, currently level with concern for the healthcare services/NHS

Concern for the healthcare services/NHS is currently 10pts lower than in April 2020

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, 16/04:250

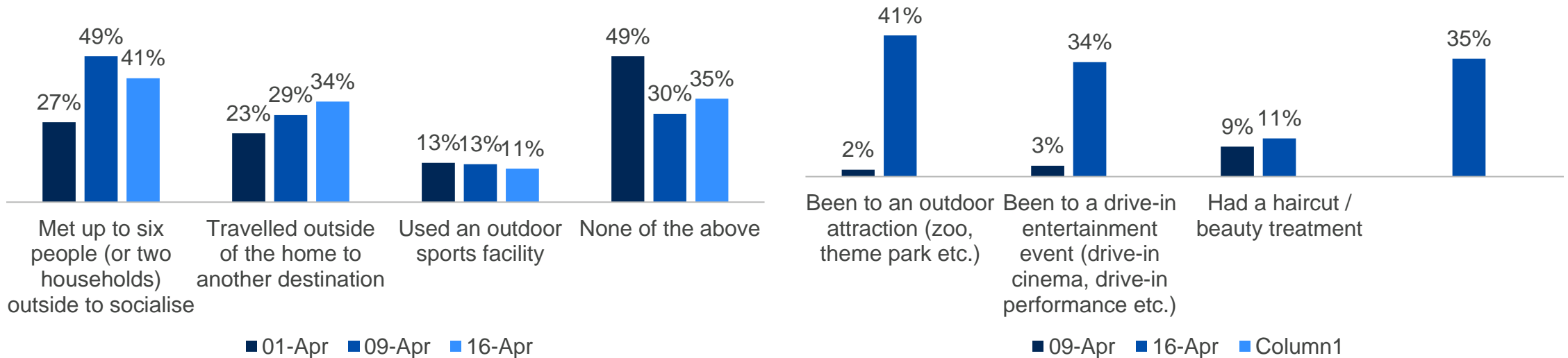
Changes in Behaviour

Out of home travel has increased this week, with 34% of those in England having travelled since 29th March

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

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

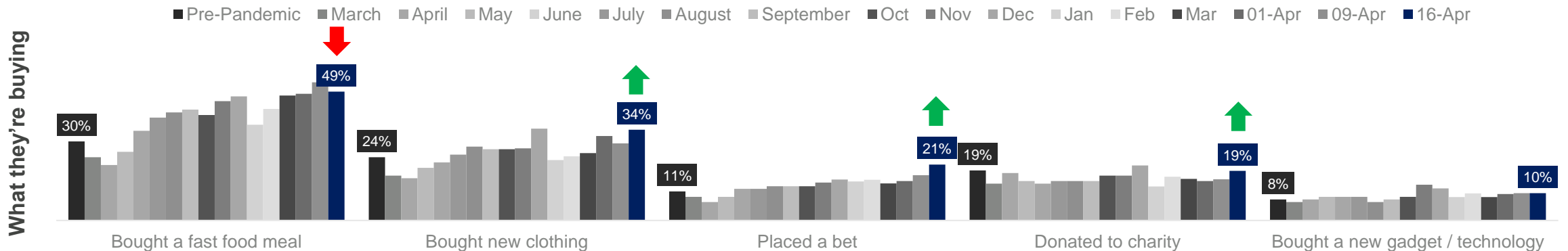
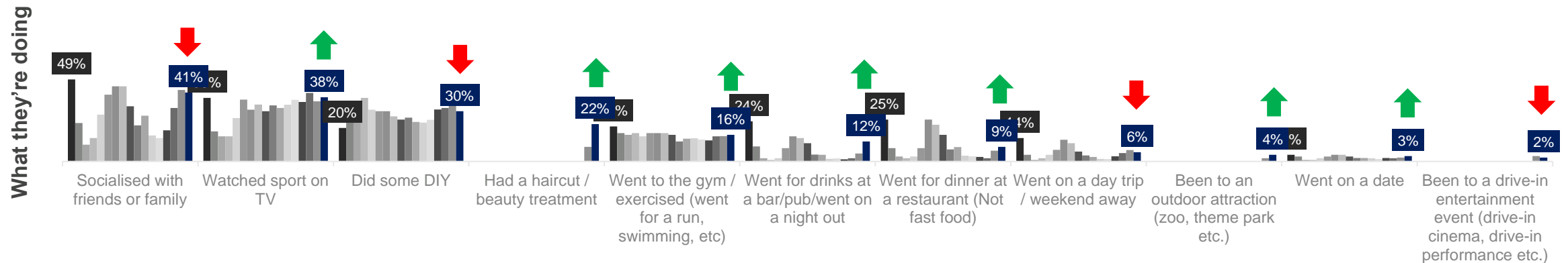




12% of people have been out for drinks in the last week, with a 7ppt increase following the reopening of pubs/bars with outdoor seating

The percentage of people socialising with their friends or family experienced a slight decline this week, dropping from 43% to 41%, but remains high as people continue to utilise the easing of lockdown restrictions

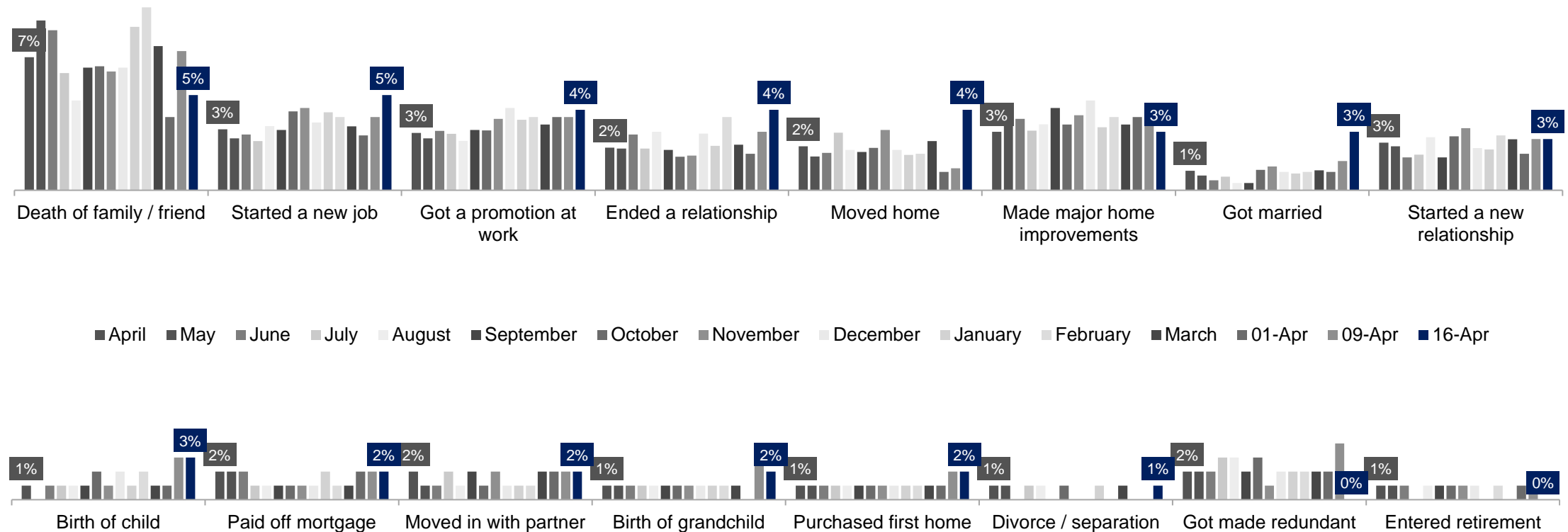
% who have done the following activities in the past 7 days





There has been a decline in the percentage of people that have recently experienced the death of a loved one

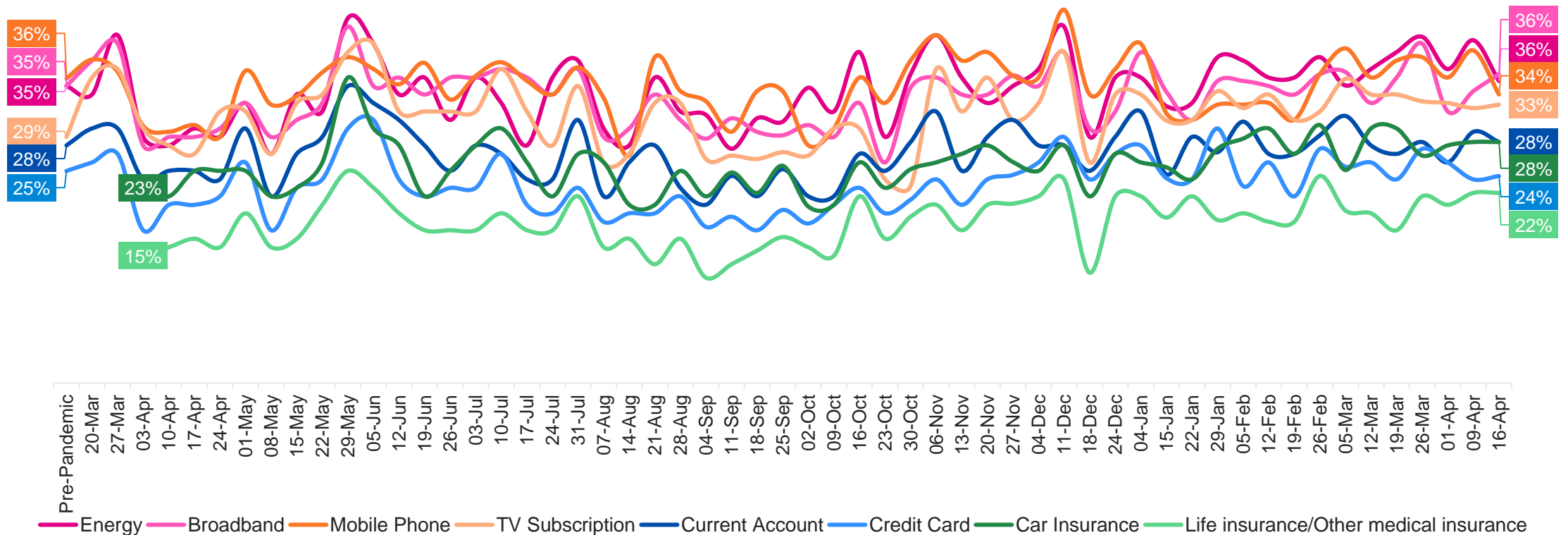
% who have done or have had the following happen to them in the last 4 weeks?





Interest in switching subscriptions has experienced minimal change this week, though there has been continued fluctuating levels of interest for switching energy or mobile phone provider in the last few weeks

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



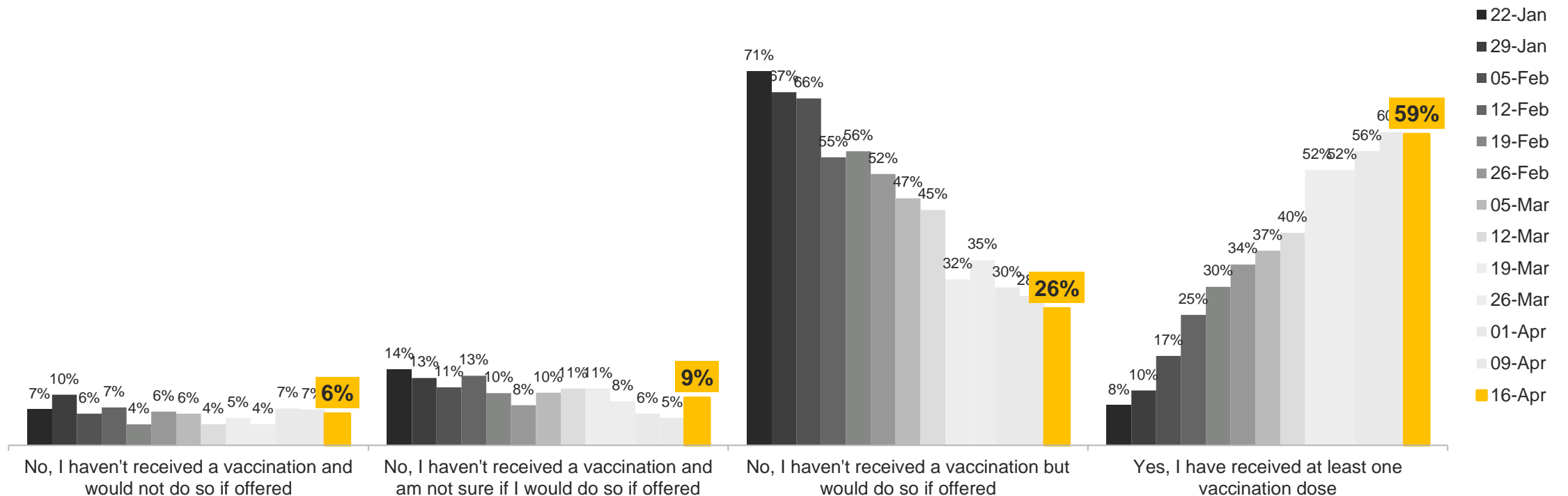


Looking ahead



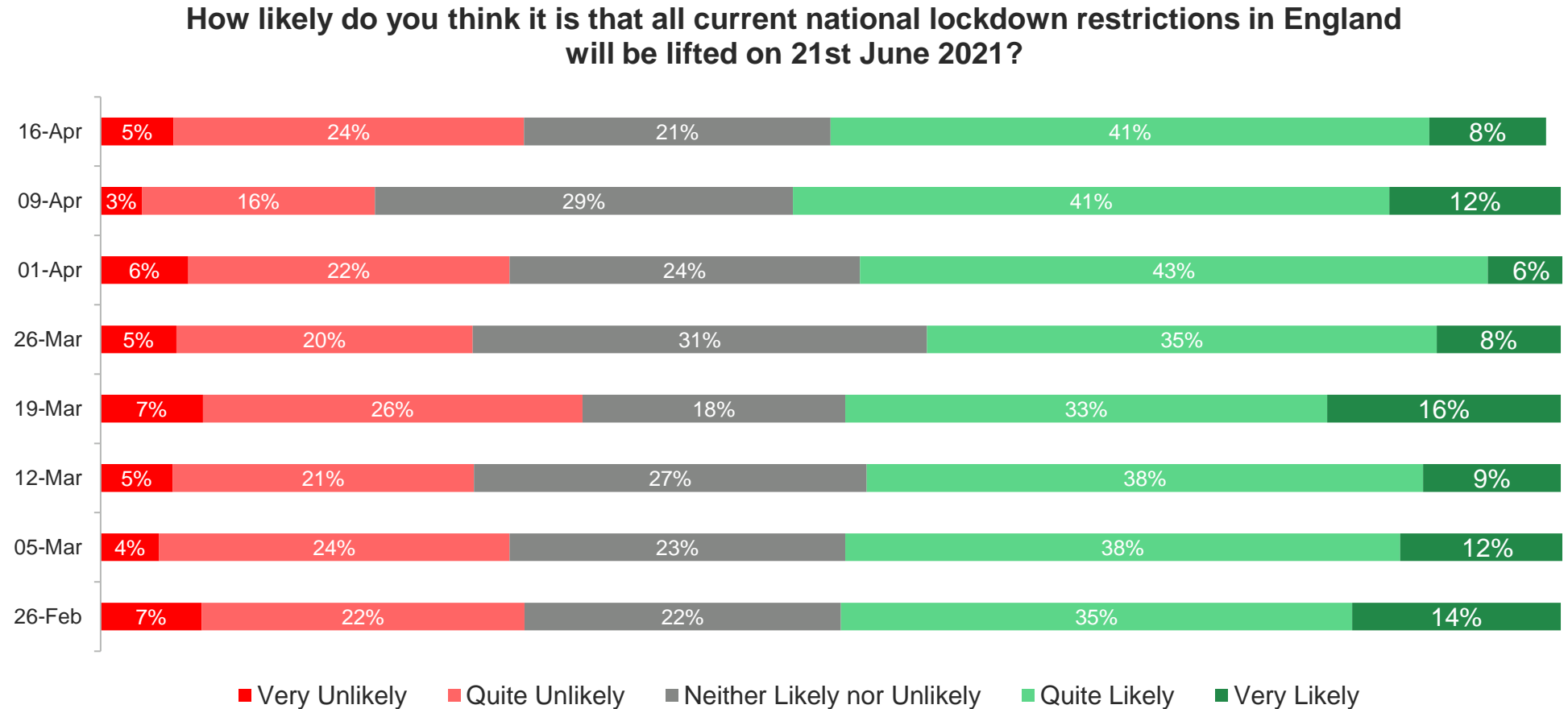
6 in 10 of those surveyed have received at least one COVID-19 vaccination dose

Have you received a vaccination for COVID-19?



Source: OMD Radar Survey. 22/01: 250, 29/01: 250, 05/02:250, 12/02:250, 19/02:252, 26/02:250, 05/03:251, 12/03:250, 19/03:250, 26/03:250, 01/04:250, 09/04:250, 16/04: 250.

Just under half of the nation are confident that the current national lockdown restrictions will be lifted on 21st June as planned



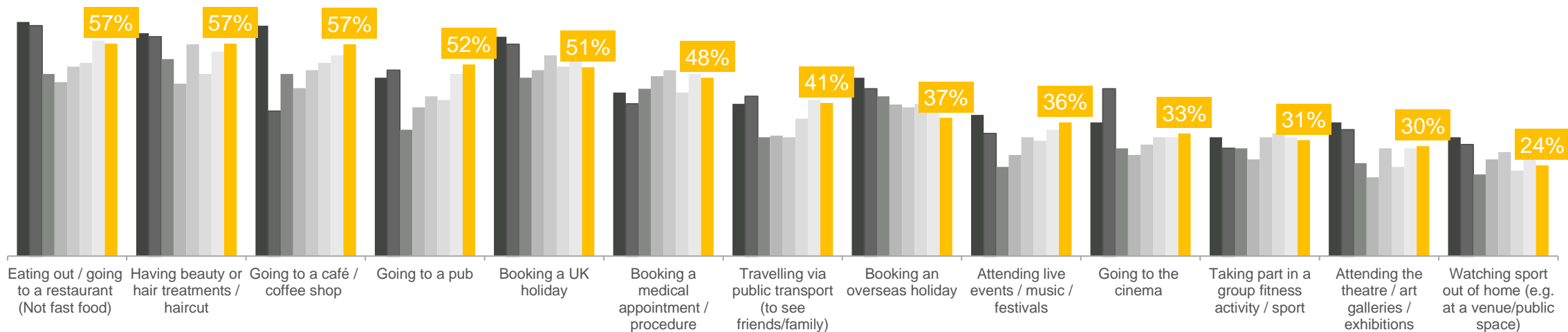


In the week of the easing of lockdown restrictions, we see increases in those who are interested in having beauty treatments, going to cafes/coffee shops and going to the pub

We have seen some declines in interest in booking UK and overseas holiday this week (-3ppts and -7ppts respectively)

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 ■ 16-Apr



Source: OMD Radar Survey. 26/02:250, 05/03: 251, 12/03: 250, 19/03: 250, 26/03: 250, 01/04:250, 09/04: 250, 16/04: 250.

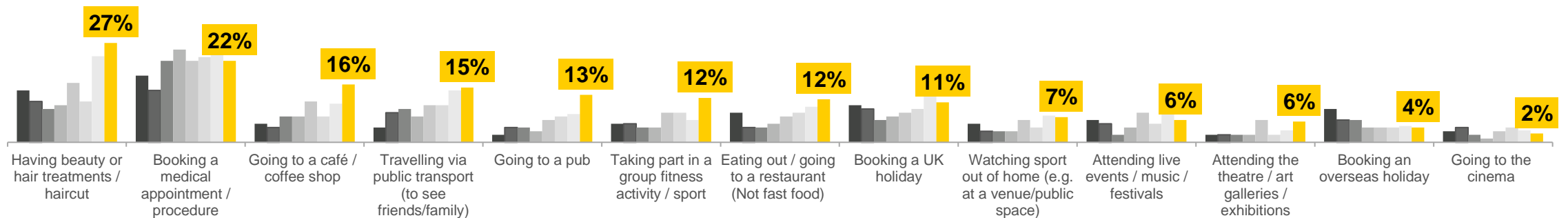


Bookings for beauty appointments, cafes, pubs and restaurants continues to rise this week

We have seen a sharp increase in those booking a group fitness class this week, doubling in size from 6% to 12%

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 ■ 16-Apr

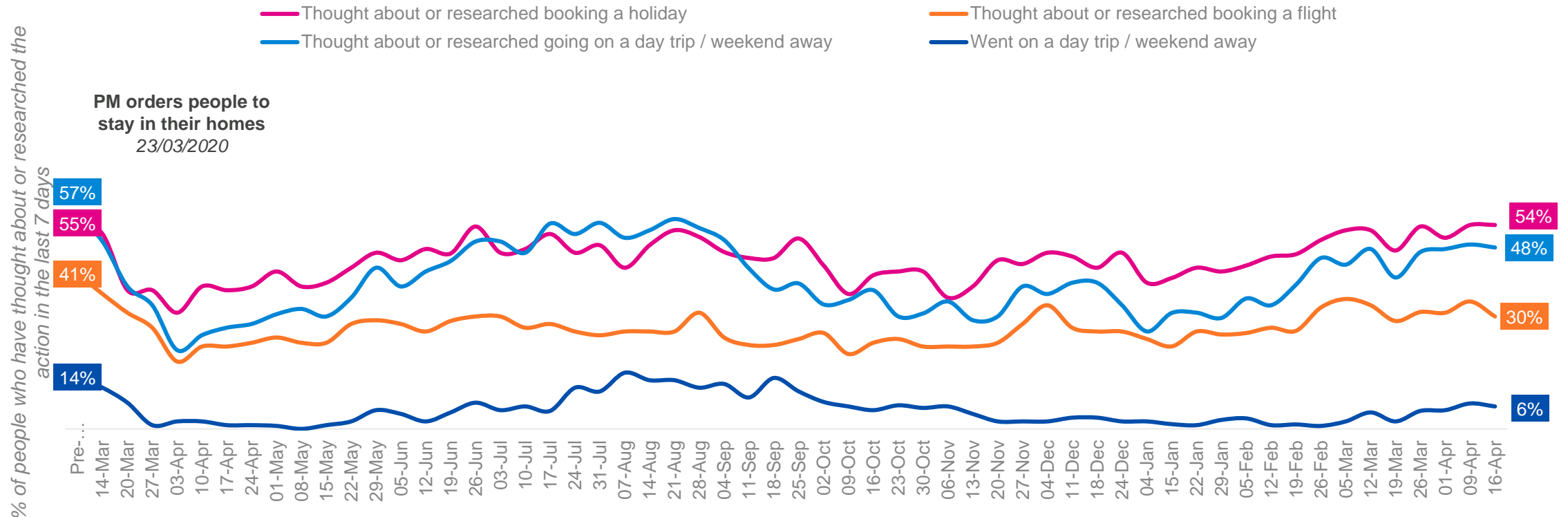




There has been a slight dip in those showing interest in booking a flight this week

Over ½ of the population continue to claim to be thinking about or researching booking a holiday (no change), and there is sustained interest in going on a day trip / weekend away (-1ppt)

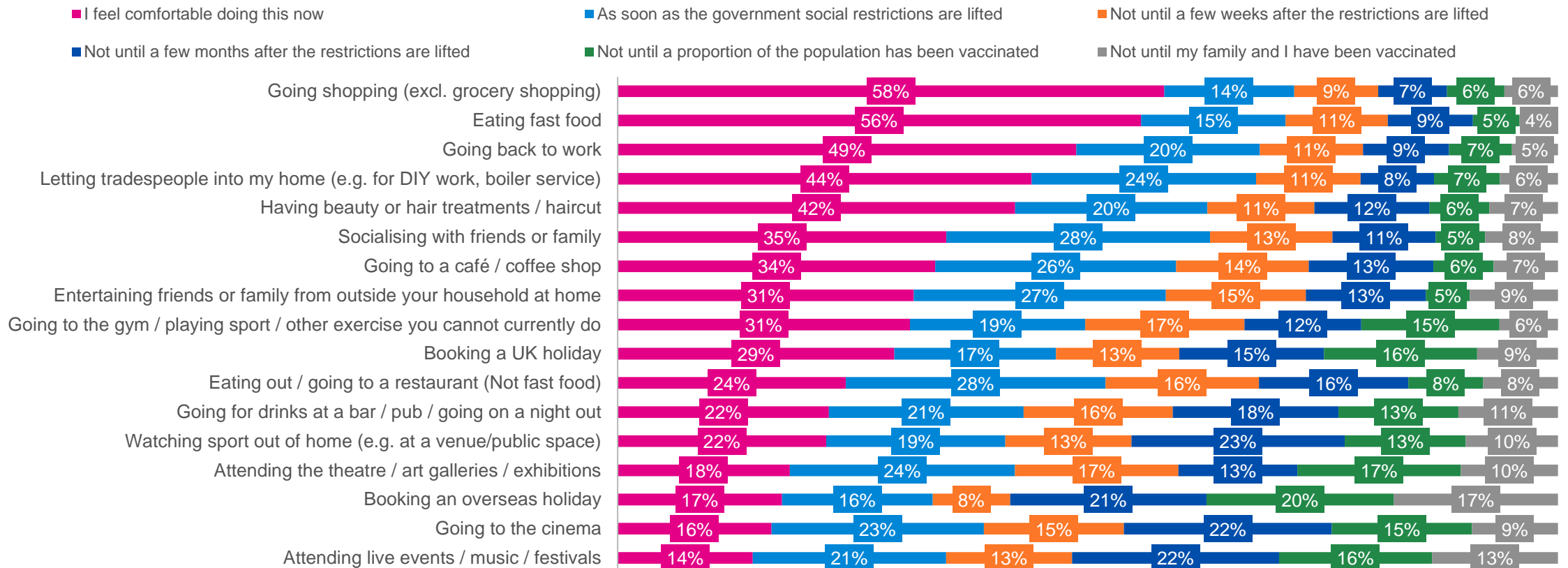
Looking at the different activities listed below, in the past 7 days which have you thought about and or researched if at all?
Which of the below, if any, have you done or have happened to you in the last 7 days? – Went on a day trip



As restrictions have eased, those feeling comfortable taking part in activities has increased, particularly those involving seeing friends and family

Feeling comfortable socialising with friends or family has increased 6ppts this week, now at over a third of the population (35%). Those feeling comfortable entertaining friends and family in the home has also increased significantly from 23% to 31% this week (+8ppts)

When would you feel comfortable doing the following again?



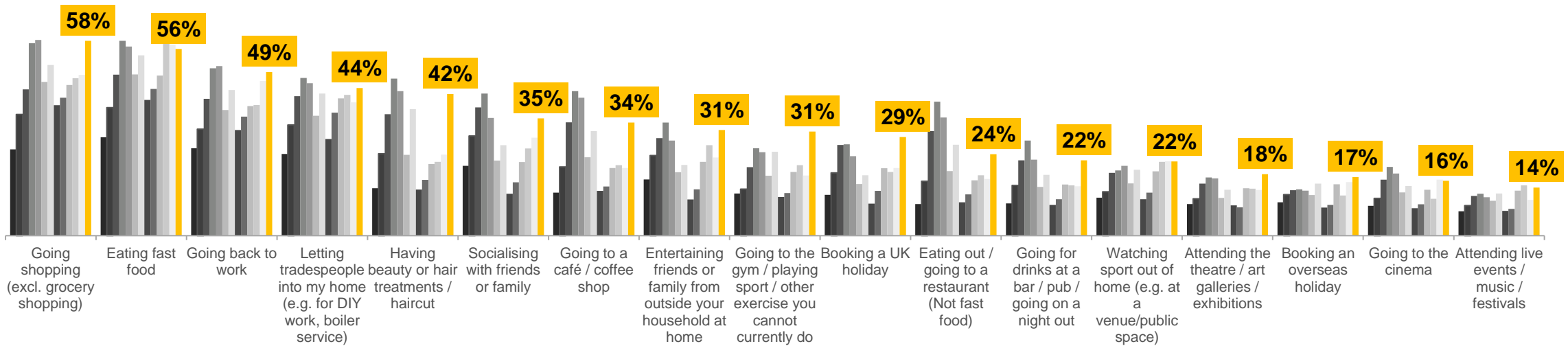


Post the reopening of non-essential retail, over half of the population feel comfortable going shopping, there's a spike in those comfortable having a beauty or hair treatment

This week we have seen a 7ppt increase in those feeling comfortable going to pubs/bars, moving from 15% to 22% in the last 7 days.

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 ■ 16-Apr

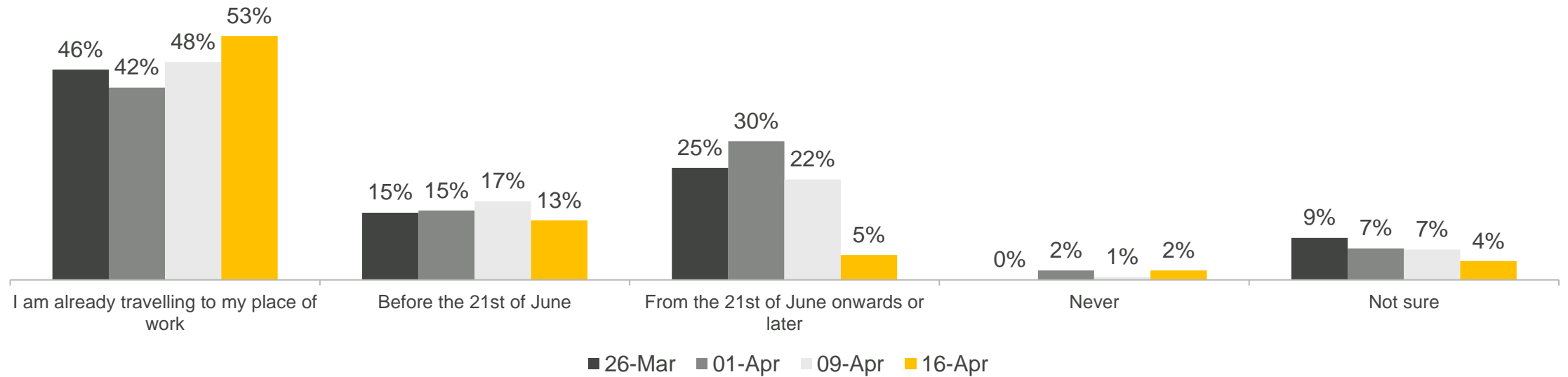


Source: OMD Radar Survey. June 2020 – April 2021. Amongst those who would usually conduct each activity (bases all above 150).

Over half of those in employment are currently travelling to their place of work

Only 4% 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?

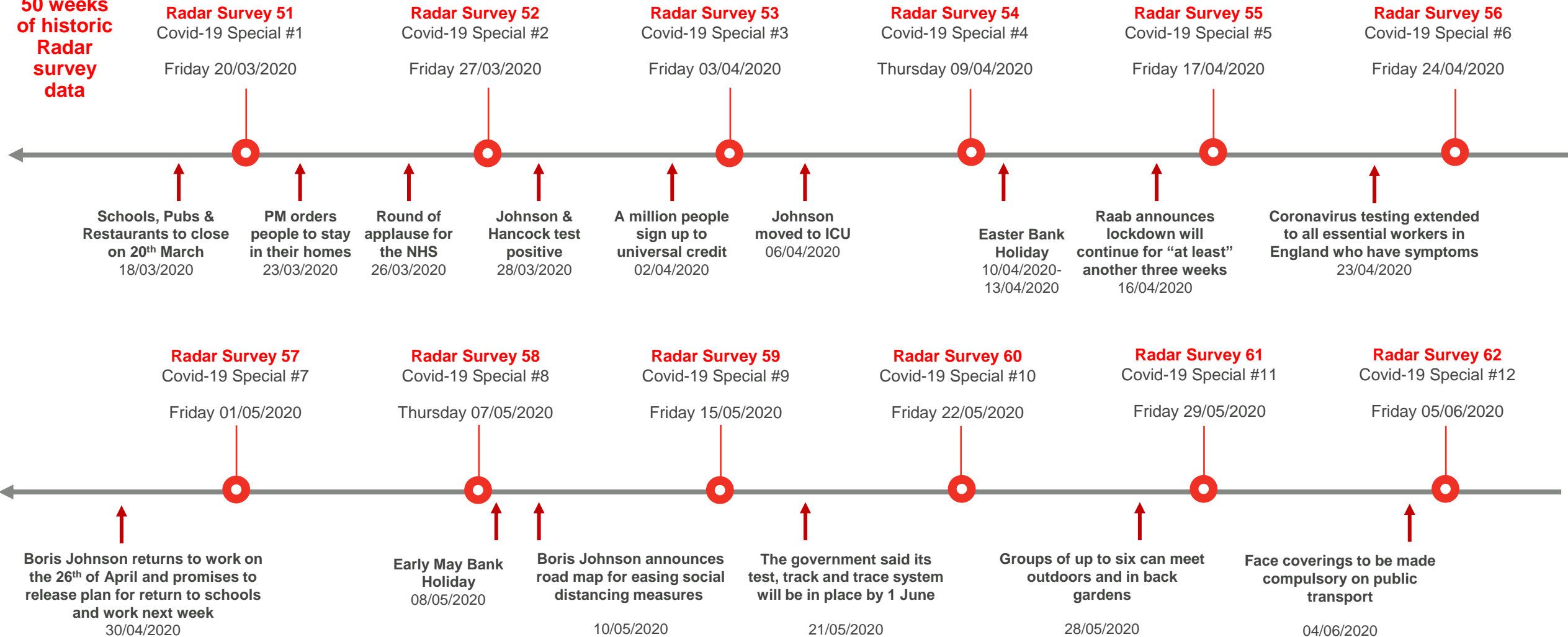


Appendix



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



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

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

Oxford coronavirus
vaccine triggers
immune response,
trial shows
20/07/2020



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

01/09/2020

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

09/09/2020

Revised government
restrictions on social
gatherings come into
place

14/09/2020

PM warns UK to
follow COVID
restrictions or risk
second lockdown

22/09/2020

Chancellor of the
Exchequer
announces Winter
Economy Plan

24/09/2020

Extended local
lockdown
measures in the
North East

01/10/2020

Boris to announce
tiered approach to
lockdown
measures

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

15/10/2020

Greater Manchester and
areas in the Midlands move
to Tier 3

20/10/1010-23/10/2020

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

31/10/2020

National lockdown in
England begins

05/11/2020

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

09/11/2020

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

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

Radar Survey 106
Covid-19 Special #56
Friday 16/04/2020

**Lockdown restrictions are eased
to allow rule of reopening of
outdoor venues, non-essential
retail and salons/barbers**
12/04/2021