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# Introduction & Summary



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 107 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 23<sup>rd</sup> April to Sunday 25<sup>th</sup> April 2021.

Summary: Despite consumer confidence seeing positive shifts this week, the mood of the nation has dipped, with anxiety levels the highest recorded since April 2020

**01** The mood of the nation has slumped this week, with fewer people reporting to feel happy, optimistic and satisfied with life. Anxiety levels are now at their highest since the start of the Pandemic in April.

02 Consumer Confidence has peaked this week, driven by positive personal financial stability and confidence in future business conditions. Intent to invest in high ticket items has soared this week, with record numbers looking into purchasing new cars and making major home improvements.

- **03** As businesses continue to boom, almost 1 in 4 people had a haircut/beauty treatment in the last 7 days and we continue to see increases in those making the most of opportunities to socialise, dinners and dates.
- 04 Interest in travelling is on the rise this week: out of home travel is continuing to increase, and more people are thinking about, researching or booking UK holidays (+7ppts) and overseas holidays (+5ppts). Additionally, interest in holidays increased to its highest point since the pandemic began and interest in booking a flight is at its highest point since before the first lockdown
- **05** The nation are reaccustoming to social situations, with more people feeling comfortable socialising (+5ppts) or entertaining at home (+6ppts) and many (44%) having socialised in the last 7 days

Life satisfaction, optimism & consumer confidence **G**MP

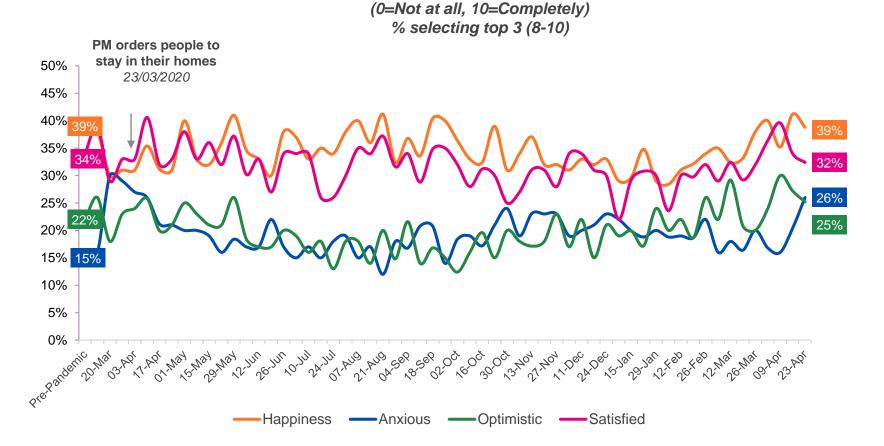
#### The mood of the nation has declined this week, with fewer people feeling happy, optimistic and satisfied with life, and anxiety levels at their highest since the start of the Pandemic in April

Happiness levels have dropped slightly this week, from 41% to 39%.

Optimism has also seen a 2ppt drop this week, from 27% to 25%.

Life satisfaction has continued on a downwards trajectory, dropping to 32% after the peak at Easter.

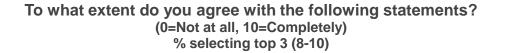
Anxiety levels have shot up this week, rising by 6%, the highest that we have seen since April.

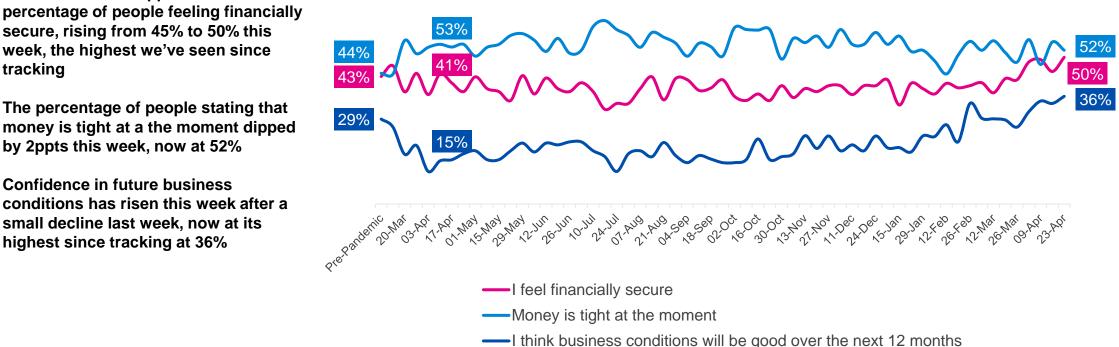


Overall, how Happy/ Anxious/ Optimistic did you feel yesterday?

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, 05/06:500, 12/06:500, 26/06:500, 03/07:500, 10/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 28/08:250, 04/09:250, 11/09:250, 18/09:250, 25/09:250, 02/10:250, 09/10:250, 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, 04/01:250, 29/01:250, 29/01:250, 05/02:250, 12/02:250, 05/03:250, 12/03:250, 10/04:250, 26/03:250, 01/04:250, 09/04:250, 23/04:250, 23/04:250, 01/04:250, 03/04:250, 23/04:250, 03/04:250, 03/04:250, 05/03:250, 12/03:250, 12/03:250, 10/04:250, 03/04:

Financial security has seen a positive shift this week, with record levels of those feeling financially secure and confident in future business conditions





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, 26/06:5 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, 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, 25/09:250, 18/09:250, 12/09:250, 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, 23/04:250, 12:02:250, 19/02:252, 26/02:250, 05/03:250, 12

There has been a 5ppt lift in the percentage of people feeling financially secure, rising from 45% to 50% this week, the highest we've seen since tracking

The percentage of people stating that

conditions has risen this week after a

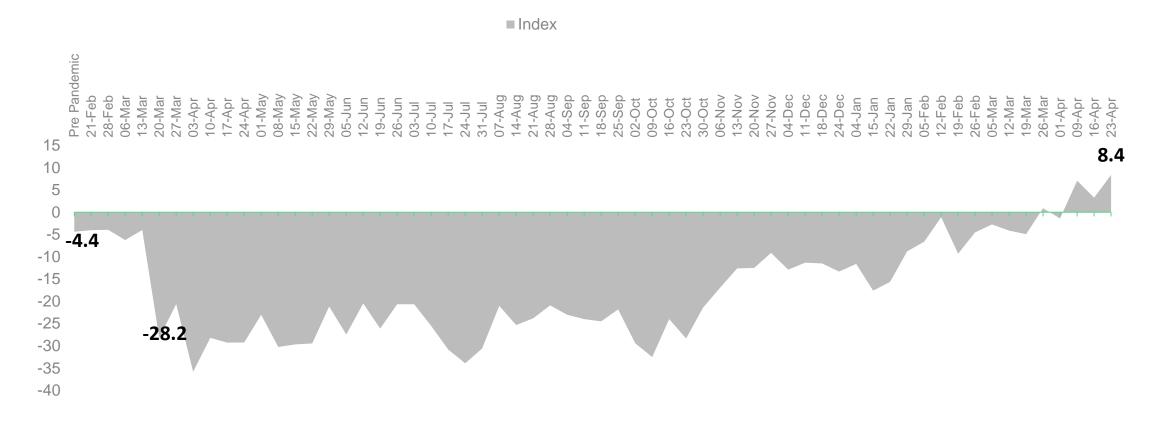
small decline last week, now at its highest since tracking at 36%

by 2ppts this week, now at 52%

Confidence in future business

#### **G**MP

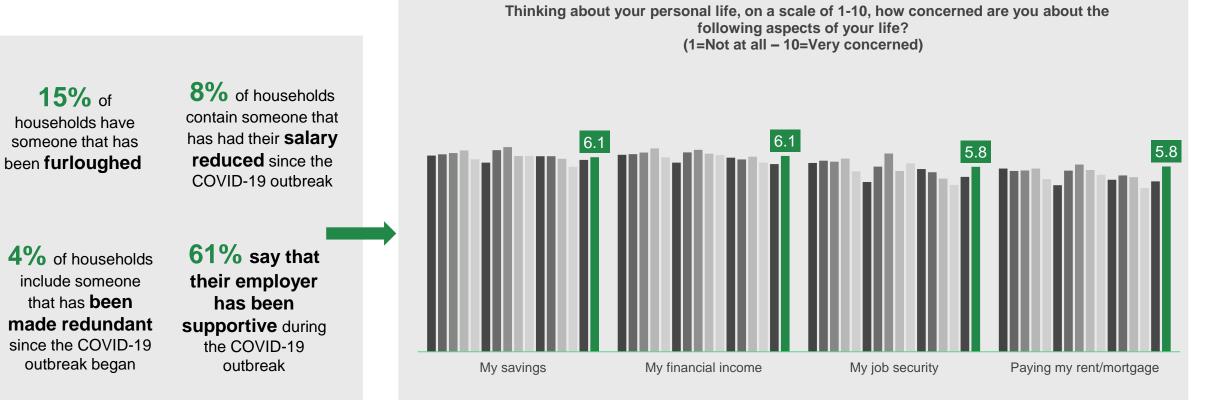
### Consumer confidence has increased back up this week, now at the highest since tracking



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 remove 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.

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, 12/05:500, 29/05:500, 05/06:500, 12/06:500, 26/06:500, 20/07:500, 03/07:500, 10/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 28/08:250, 04/09:250, 18/09:250, 25/09:250, 02/10:250, 09/10:250, 26/03:250, 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, 29/01:250, 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, 23/04

### Despite positive shifts in consumer confidence and financial stability, we have seen an increase in concerns over finances and job security this week



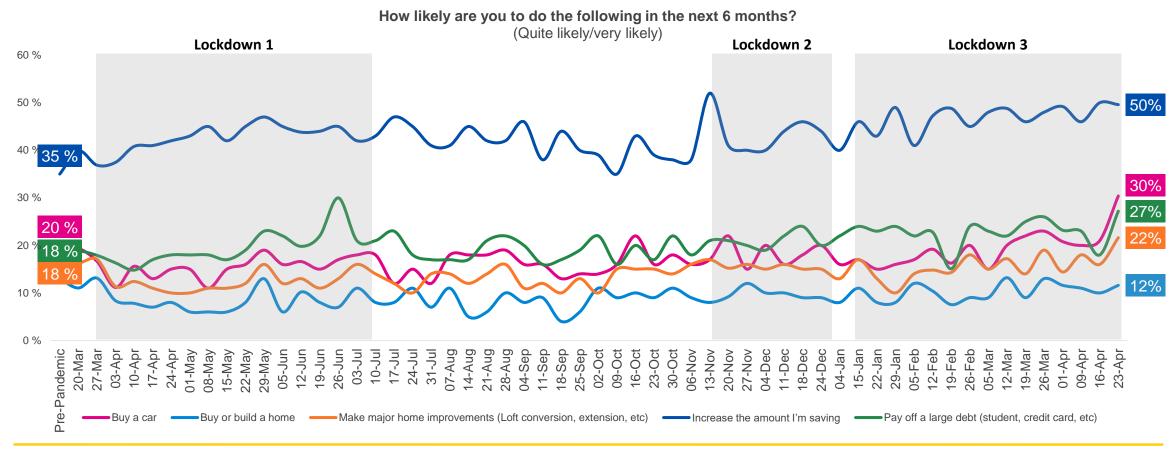
April May June July August Sep October Nov Dec Jan Feb March 01-Apr 09-Apr 16-Apr 23-Apr

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, 05/06:500, 12/06:500, 12/06:500, 26/06:500, 03/07:500, 10/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 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, 01/12:250, 18/12:250, 24/12:250, 04/01:250, 29/01:250, 29/01:250, 05/02:250, 12/02:250, 10/02:252, 26/02:250, 05/03:250, 12/03:250, 19/03:250, 26/03:250, 01/04: 250, 09/04:250, 23/04:250, 23/10: 254, 30/10: 250, 06/11:250, 13/11:251, 20/11:250, 27/11:265, 4/12:250, 01/12:250, 24/12:250, 04/01:250, 15/01:230, 29/01:250, 05/02:250, 12/02: 250, 19/02:252, 26/02:250, 05/03:250, 12/03:250, 26/03:250, 01/04: 250, 09/04:250, 23

Intent to invest in high ticket items has soared this week, with spikes in those open to buying a car and making major home improvements

Those intending to pay off a large debt has seen a significant increase this week, moving 9ppts from 19% to 27%.

The percentage of people that report a likelihood to increase the amount they are saving is the only metric to have remained flat this week, remaining at 50%.



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, 26/06:500, 03/07:500, 10/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 04/09:250, 11/09:250, 18/09:250, 02/10:250, 09/10:250, 09/10:250, 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, 04/01:250, 15/05:200, 05/03: 250, 12/03:250, 01/04:250, 23/10: 250, 06/11:250, 13/11:251, 20/11:250, 27/11:265, 4/12:250, 11/12:250, 04/01:250, 15/01:236, 22/01:250, 05/02:250, 12/02: 250, 19/02:252, 26/02:250, 05/03: 250, 12/03:250, 01/04:250, 23/04:250, 23/04:250

Confidence in Government & Broad Concerns

## Confidence in the government has dropped slightly this week, but still remains higher than 2020 scores, driven somewhat by the vaccine rollout

Many still feel as though the death numbers in the UK demonstrate that more could have been done by our Government

"Highest death rate in europe even after 3 lockdowns. they never react quick enough despite all the warnings"

"We have the highest death rate: it's a no brainer"

Some also note the confusing messaging, and double standards demonstrated by the Government

"There has been too many U turns leading to delays in decisions and actions. And the distribution of contracts to friends and companies which politicians have a financial interest is disgusting."

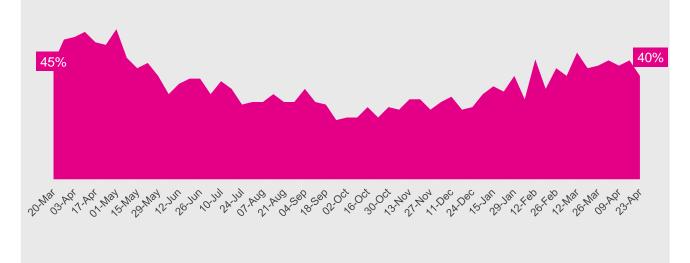
"The government is a shambles full of privilleged rich making money from exploiting people in need"

The vaccine roll out remains a key driver of public confidence in the government:

"Its very much uncharted terrority so they do their best, and the vaccine program is a great success"

"Unprecedented situation has been dealt with admirably. The fact we have vaccinations whilst the rest of the world seems to struggle is positive."

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

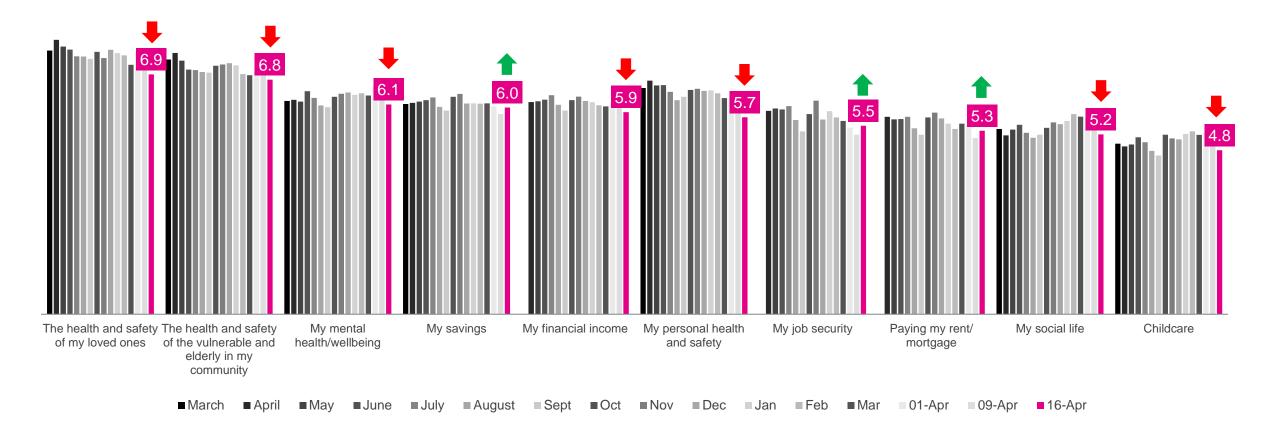


Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 12/05:500, 29/05:500, 05/06:500, 12/06:500, 26/06:500, 03/07:500, 10/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 04/09:250, 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, 04/01: 250, 15/01: 236, 22/01: 250, 29/01:250, 05/02:250, 12/02:250, 05/03:250, 12/03:250, 01/04:250, 13/01:250, 23/10: 254, 30/10: 250, 23/10: 254, 30/10: 250, 04/01: 250, 13/11:251, 20/11:250, 23/10: 254, 30/10: 250, 04/01: 250, 15/01: 236, 22/01: 250, 05/02:250, 12/02:250, 05/03:250, 12/03:250, 01/04:250, 01/09:250, 23/04: 250.

#### **G**MP

#### Concerns over the wellbeing of ourselves and others has continued to decline this week

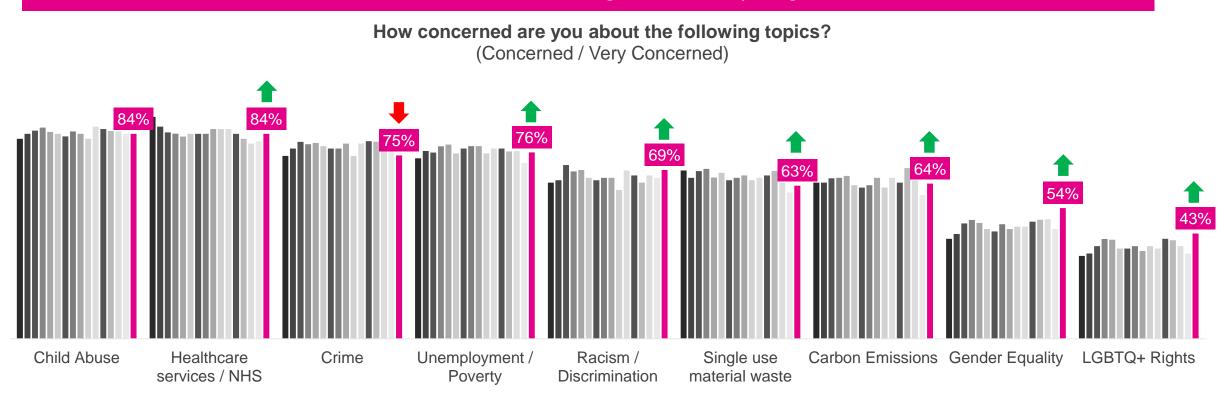
Thinking about your personal life, on a scale of 1-10, how concerned are you about the following aspects of your life? (1=Not at all – 10=Very concerned)



Source: OMD Radar Survey. Pre-Pandemic: 12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 05/06:500, 12/06:500, 12/06:500, 26/06:500, 03/07:500, 10/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 24/08:250, 24/08:250, 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, 05/02:250, 12/02:252, 26/02:250, 05/03:250, 12/03:250, 01/04:250, 09/04:250, 16/04:250, 23/04: 250.

#### Almost all concerns have increased this week, with notable shifts in concerns over Gender Equality and LGBTQ+ Rights

Concern for the healthcare services/NHS has increased again this week, equalling concerns over child abuse.



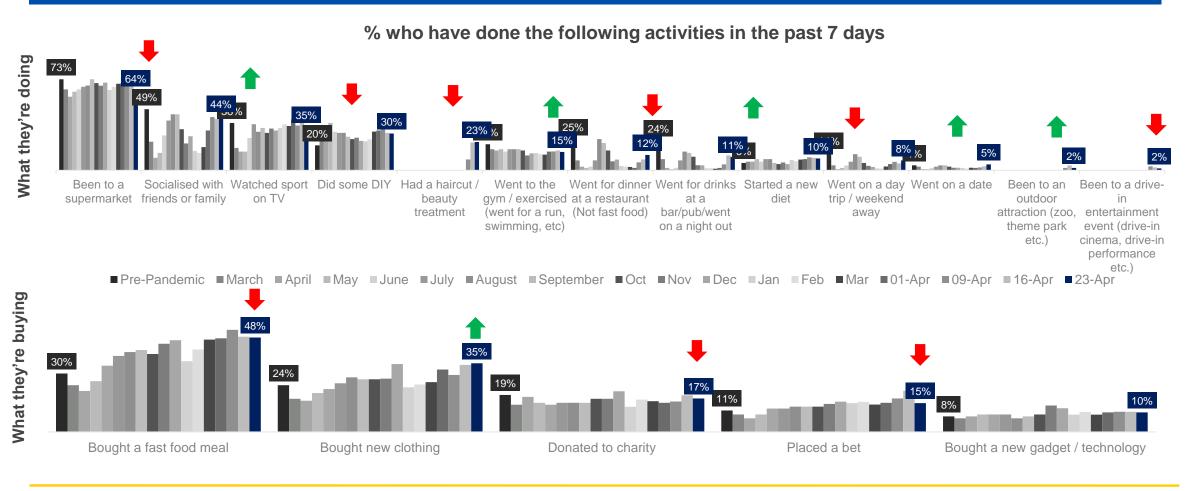
■ April ■ May ■ June ■ July ■ August ■ Sept ■ Oct ■ Nov ■ Dec ■ Jan ■ Feb ■ Mar ■ 01-Apr ■ 09-Apr ■ 16-Apr ■ 23-Apr

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, 05/06:500, 12/06:500, 12/06:500, 26/06:500, 03/07:500, 10/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 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, 04/01: 250, 15/01:236, 22/01:250, 09/01:250, 12/02:250, 12/02:250, 05/03:250, 12/03:250, 19/03:250, 01/04: 250, 09/04:250, 13/11:251, 20/11:250, 23/04:250, 23/04:250, 04/01: 250, 05/04:250, 23/04:250, 23/04:250, 05/03:250, 12/03:250, 12/03:250, 01/04: 250, 09/04:250, 16/04:250, 23/04:250, 23/04:250, 04/04:250, 04/04:250, 03/04:250, 23/04:250, 05/03:250, 12/03:250, 12/03:250, 12/03:250, 01/04: 250, 09/04:250, 03/04:250, 23/04:250, 23/04:250, 05/03:250, 12/03:250, 05/03:250, 12/03:250, 01/04: 250, 09/04:250, 03/04:250, 23/04:250, 05/03:250, 05/03:250, 12/03:250, 05/03:250, 01/04: 250, 09/04:250, 03/04:250, 03/04:250, 05/03:250, 05/03:250, 05/03:250, 12/03:250, 01/04: 250, 09/04:250, 03/04:250, 03/04:250, 03/04:250, 05/03:250, 05/03:250, 05/03:250, 01/04: 250, 09/04:250, 03/04:2

#### Changes in Behaviour

#### Almost 1 in 4 people had a haircut/beauty treatment in the last 7 days and socialising, dinners and dates were more prevalent

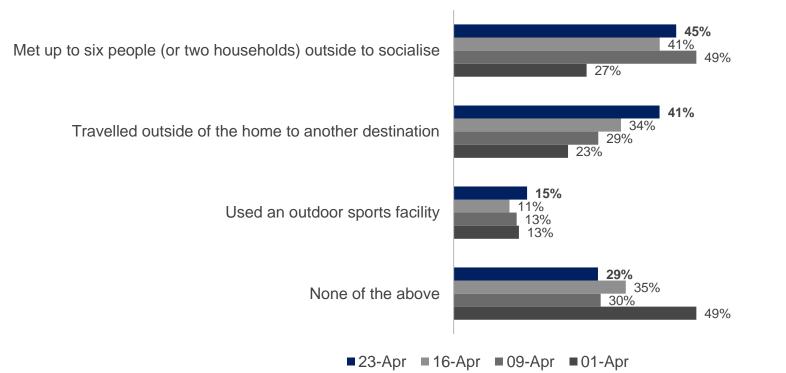
The percentage of people socialising with their friends or family increased from 41% to 44% this week and there were increases in the percentage of people going for dinner (+3ppts), on day trips (+2ppts) and dates (+2ppts)



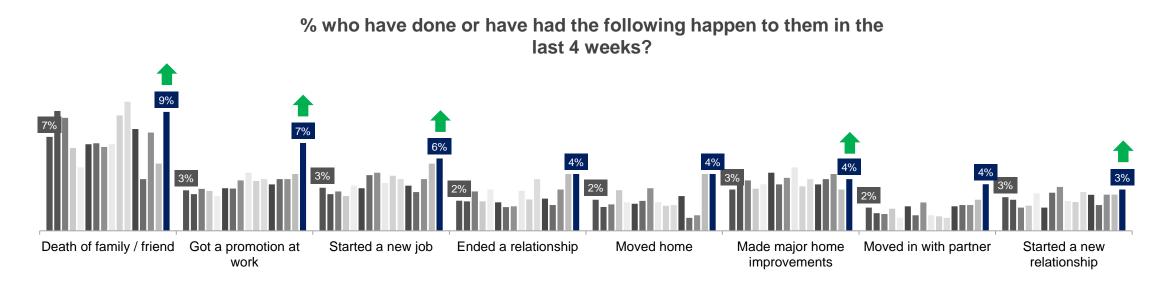
Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 05/06:500, 12/06:500, 12/06:500, 26/06:500, 03/07:500, 10/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 04/09:250, 11/09:250, 18/09:250, 02/10:250, 09/10:250, 09/10:250, 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, 05/03:251, 12/03:250, 19/03:250, 26/03:250, 01/04:250, 03/04:250, 23/04:250, 03/04:250, 05/03:251, 12/03:250, 01/04:250, 09/04: 250, 16/04:250, 23/04:250, 03/04:250, 05/03:251, 12/03:250, 05/03:251, 12/03:250, 01/04:250, 09/04: 250, 16/04:250, 23/04:250, 03/04:250, 03/04:250, 05/03:251, 12/03:250, 05/03:251, 12/03:250, 01/04:250, 09/04: 250, 16/04:250, 23/04:250, 05/03:251, 12/03:250, 05/03:251, 12/03:250, 01/04:250, 09/04: 250, 16/04:250, 03/04:250, 05/03:251, 12/03:250, 05/03:251, 12/03:250, 05/03:250, 01/04:250, 03/04:250, 03/04:250, 03/04:250, 05/03:250, 05/03:251, 12/03:250, 05/03:250, 01/04:250, 03/04:250,

### Out of home travel has continued to increase, with 4 in 10 people in England now having travelled since 29<sup>th</sup> 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



#### There have been increases in changes to employment, with more people getting promoted, starting a new job or being made redundant



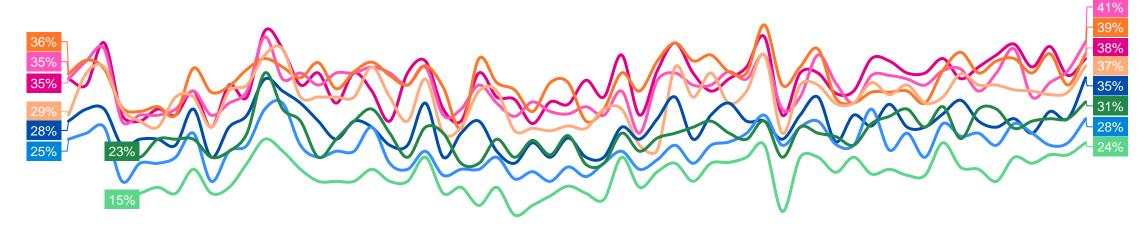
April May June July August September October November December January February March 01-Apr 09-Apr 16-Apr 23-Apr

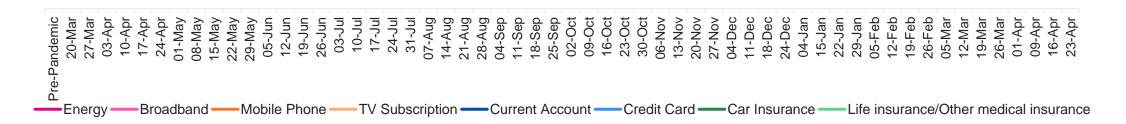


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## Interest in switching subscriptions has experienced minimal change this week, though there has been continued fluctuating levels of interest for switching energy or mobile phone provider in the last few weeks

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

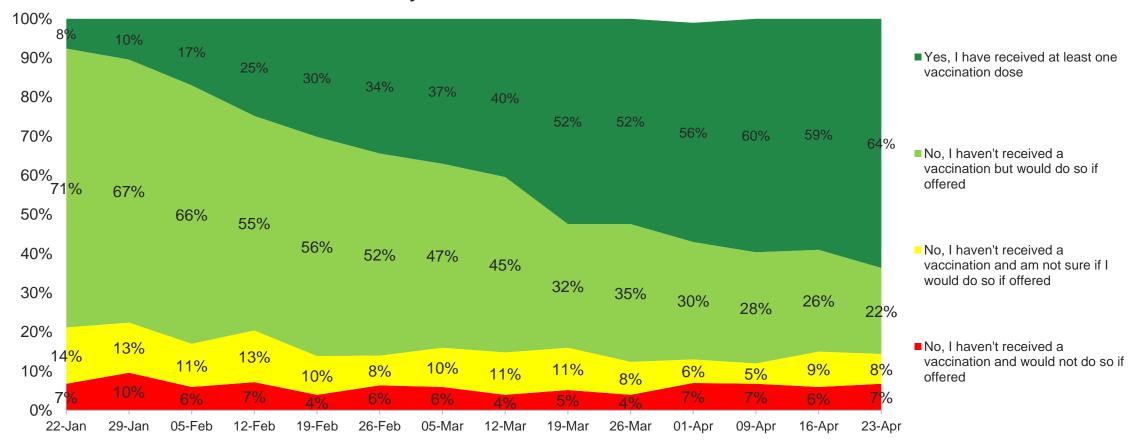




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#### Looking ahead

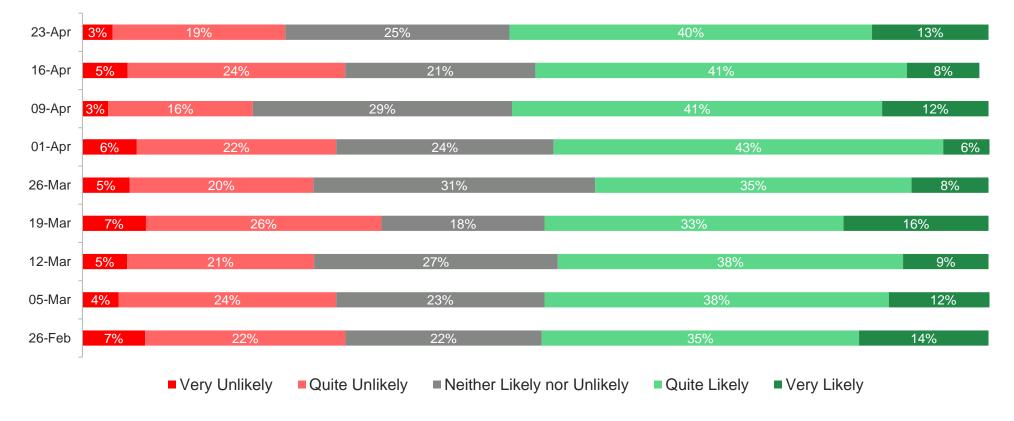
### 64% of those surveyed have received at least one COVID-19 vaccination dose but a consistent proportion of the population remain uncertain



Have you received a vaccination for COVID-19?

#### Confidence that the current national lockdown restrictions will be lifted on 21<sup>st</sup> June as planned remains high but almost half of the population remains sceptical

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

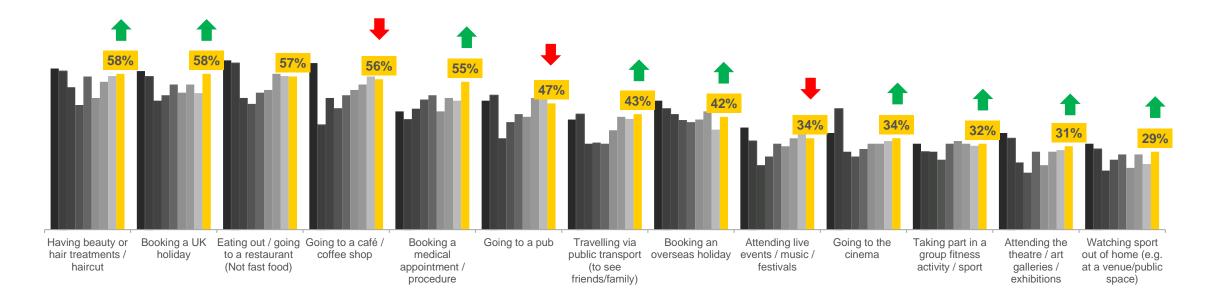


#### Holidays were prominent in the minds of the population this week, with more people thinking about, researching or booking UK holidays (+7ppts) and overseas holidays (+5ppts)

Following high levels of interest in the first couple of weeks following the latest easing of lockdown restrictions, there was a 5ppt drop in planning pub visits 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 ■ 16-Apr ■ 23-Apr

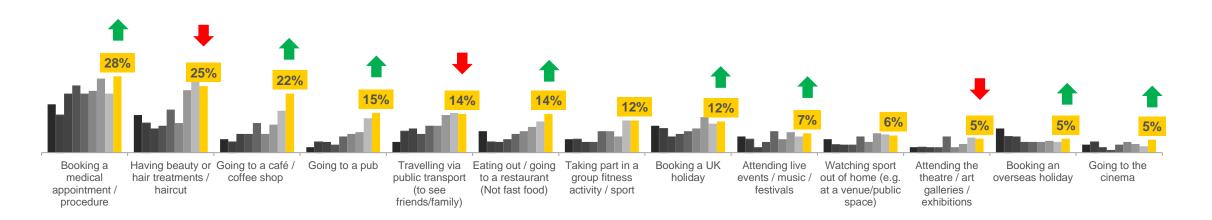


#### Bookings for hospitality venues continued to rise this week, with more people booking trips to cafes (+6ppts), pubs (+2ppts) and restaurants (+2ppts)

Though not as significant as the rise in thinking about/researching, there have been increases in the percentage of people booking UK holidays (+1ppt) and overseas holidays (+1ppt)

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

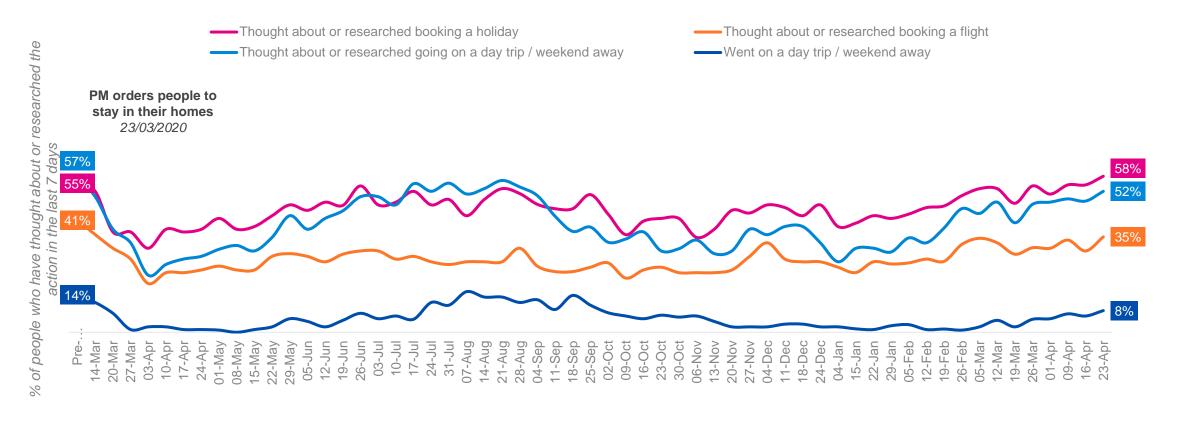
■ 26-Feb ■ 05-Mar ■ 12-Mar ■ 19-Mar ■ 26-Mar ■ 01-Apr ■ 09-Apr ■ 16-Apr ■ 23-Apr



#### Interest in holidays increased to its highest point since the pandemic began and interest in booking a flight is at its highest point since before the first lockdown

There has been a 4ppt increase in the percentage of people that claim to be thinking about or researching booking a holiday, a 5ppt increase in thinking about or researching flight bookings and a 4ppt increase in interest in day trips / weekends away

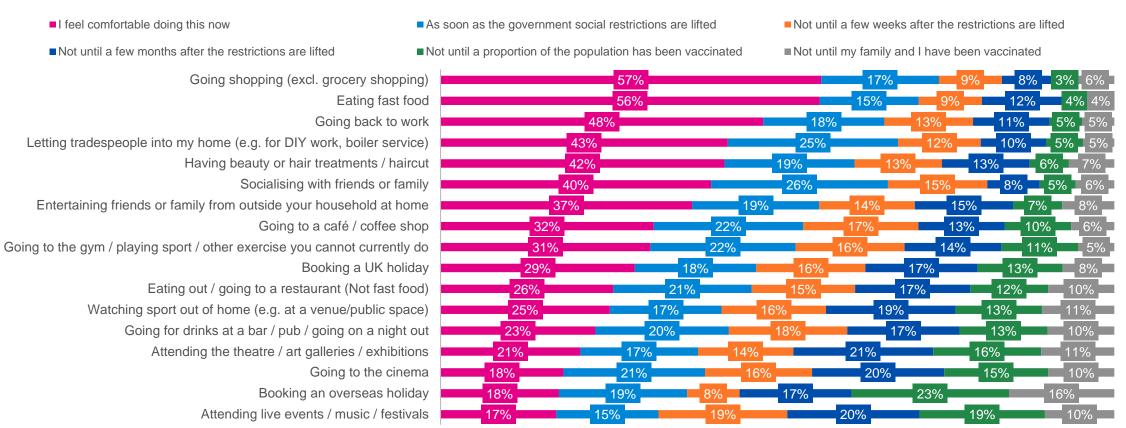
Looking at the different activities listed below, in the past 7 days which have you thought about and or researched if at all? Which of the below, if any, have you done or have happened to you in the last 7 days? – Went on a day trip



Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:488, 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, 12/06:500, 26/06:500, 03/07:500, 10/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 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, 05/02:250, 05/02:250, 12/02:252, 26/02:250, 05/02:251, 12/03:250, 19/03: 250, 26/03:250, 01/04:250, 09/04:250, 23/04:250, 23/04:250, 09/04:250, 05/02:250, 05/02:250, 05/02:251, 12/03:250, 19/03: 250, 26/03:250, 01/04:250, 09/04:250, 03/04:250, 23/04:250, 04/01: 250, 04/01: 250, 15/01: 236, 22/01:250, 05/02:250, 12/02:250, 05/02:251, 12/03:250, 19/03: 250, 26/03:250, 01/04:250, 09/04:250, 03/04:250, 23/04:250, 03/04:250, 05/02:250, 05/02:250, 05/02:251, 12/03:250, 01/04:250, 09/04:250, 09/04:250, 03/04:250, 03/04:250, 05/02:25

#### 4 in 10 people currently feel comfortable socialising with friends or family but 26% do not feel comfortable until social restrictions are lifted

The nation remains tentative over overseas holidays, with almost 1 in 4 not comfortable booking an overseas holiday until a significant proportion of the population has been vaccinated



#### When would you feel comfortable doing the following again?

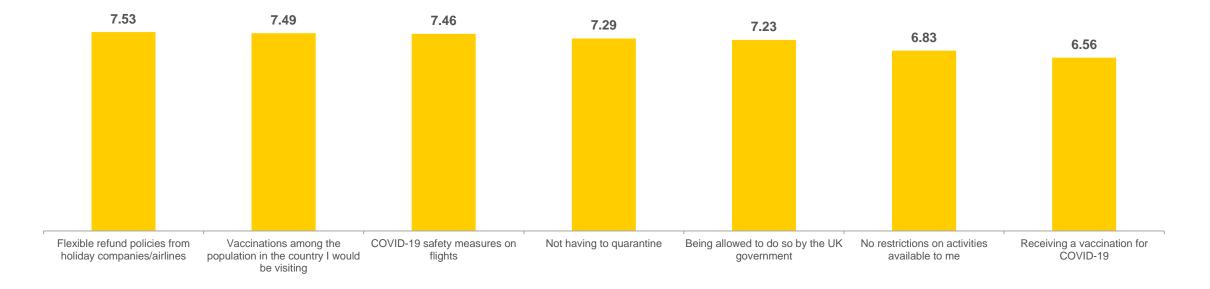
Source: OMD Radar Survey. 23/04: 250. Amongst those who would usually conduct each activity (bases all above 150).

#### **G**MP

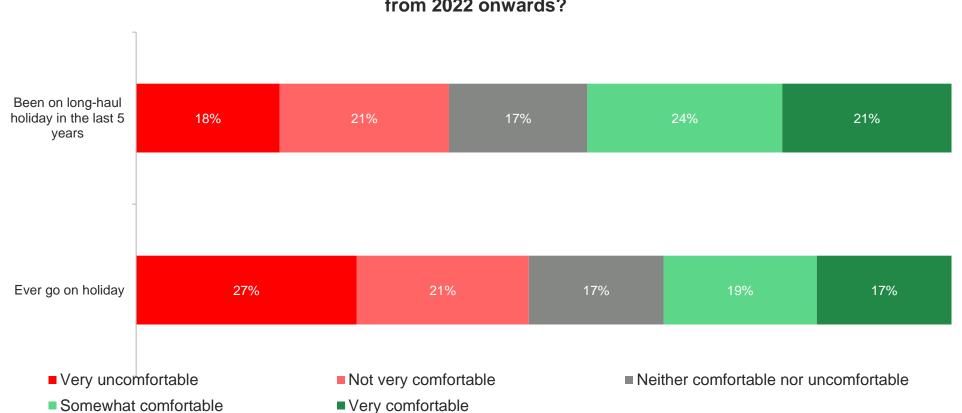
Holidaymakers would feel more comfortable with overseas travel if there were flexible refund policies, high levels of vaccinations among the population of the destination and in-flight safety measures



Apr-21



Almost half (45%) of those who have been on a long-haul holiday in the last 5 years feel comfortable doing so again from 2022 onwards

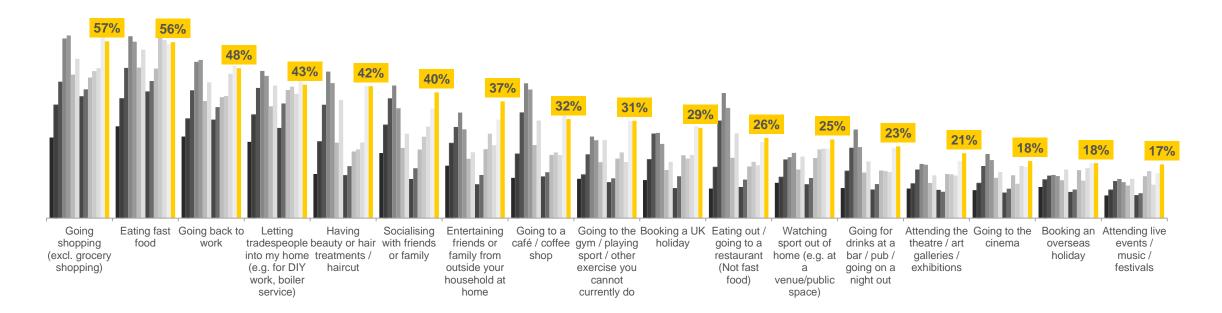


How comfortable would you feel taking a long haul flights (e.g. to Asia, Australia etc.) from 2022 onwards?

Feeling comfortable in social situations has continued to rise, with more people feeling comfortable socialising (+5ppts) or entertaining at home (+6ppts)

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 ■23-Apr



#### A greater proportion of the population intend to wait until after the 21<sup>st</sup> June before returning to travelling to work compared with last week

There remains a minority of people in employment remain unsure when they will continue travelling to their place of work (5%) or never returning to travelling to work (1%)

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

