

COVID-19 Consumer Impact Report
w/c 17.05.21

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 110 weeks, surveyed over 31,000 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 the 21st of May to Sunday 23rd of May 2021.



Summary: As people enjoy the latest easing of restrictions, happiness, life satisfaction and optimism have all increased, however less people are confident that things will go as planned on the 21st June

- 01** A week after restrictions eased on the 17th, **happiness (+8ppts)**, **optimism (+4ppts)** and **life satisfaction (+14ppts)** have all increased
 - 02** Feelings of **financial security** and **optimism** around future financial conditions have increased in the last 7 days, however **consumer confidence** is down overall
 - 03** **Confidence in the government** has decreased 2ppts as some criticize their handling of the Indian variant and international travel, however overall, confidence is still higher than this time last year
 - 04** **Confidence that the current national lockdown restrictions will be lifted on 21st June has dropped slightly again this week** around news of new variants. Despite concerns, people are making the most of the latest easing of restrictions as, the number of people eating out and going to a café has increased this week
 - 05** As the nation prepares for Step 3 on the road out of lockdown, **there have been increases in the percentage of people thinking about, researching or booking out of home activities**; including considerable increases in booking live events and public art events ahead of the return of large-scale public events
-



**Life satisfaction,
optimism & consumer
confidence**



A week after restrictions eased on the 17th, happiness, optimism and life satisfaction have all increased, particularly life satisfaction which is up 14ppts

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



- ↑ Happiness levels have increased 8ppts, dropping from 32% to 40%.
- ↑ Optimism has seen a 4ppt increase this week, from 23% to 27%.
- ↑ Life satisfaction has increased 14ppts from 28% to 42%
- ↑ Anxiety levels have increased slightly this week, rising from 16% to 18%



Feelings of financial security and optimism around future financial conditions have increased in the last 7 days

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



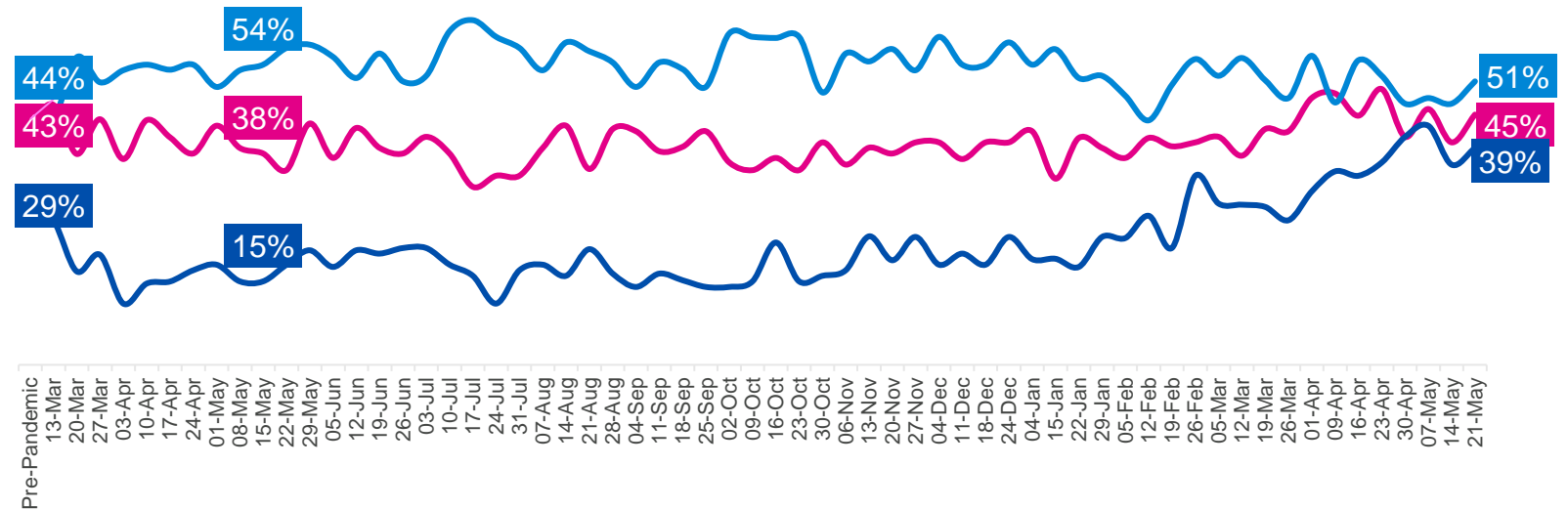
There has been a 5ppt increase in the percentage of people feeling financially secure, rising from 40% to 45% this week



The percentage of people stating that money is tight at the moment increased slightly this week, from 47% to 51%



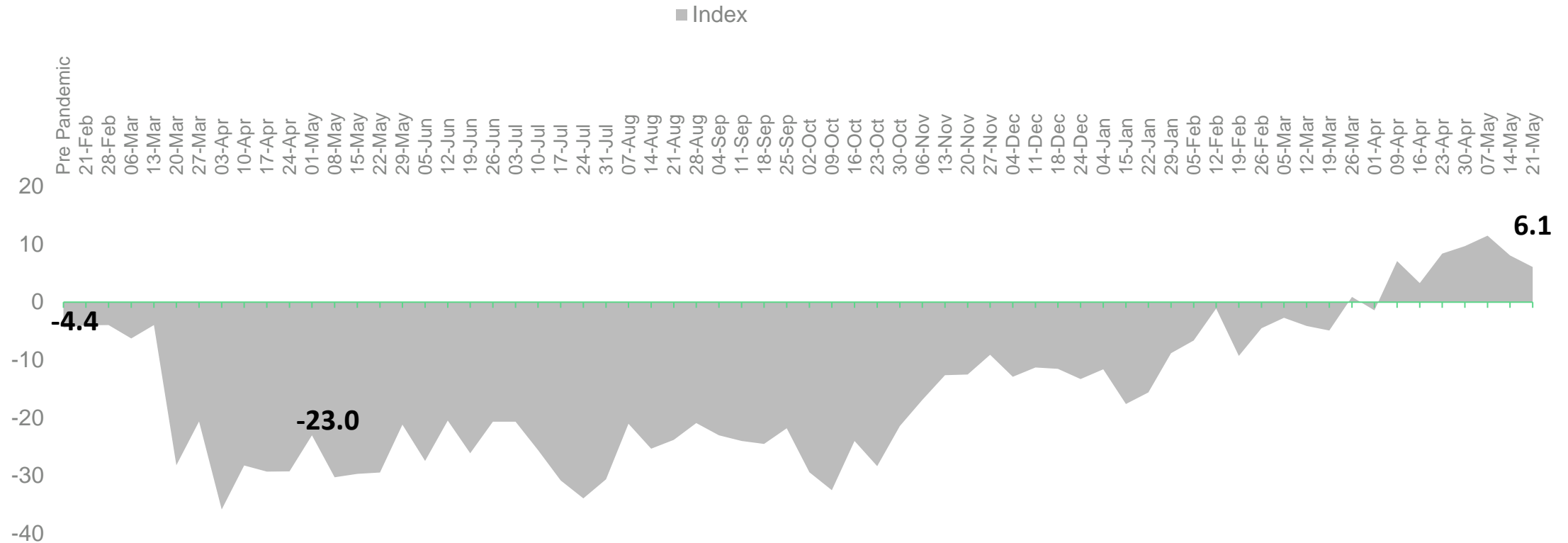
Confidence in future business conditions has increased this week from 36% to 39%



- I feel financially secure
- Money is tight at the moment
- I think business conditions will be good over the next 12 months



Consumer confidence has decreased again this week, dropping from 8.1 to 6.1



The Consumer Confidence index can range from 100 to -100 and is calculated by subtracting negative financial outlook from positive financial outlook. A zero score means equal positive and negative feedback. *Please note that we have removed two statements that were originally included in Index calculations to get a more nuanced view, and therefore the data now shown in this chart is different to previous weeks.*



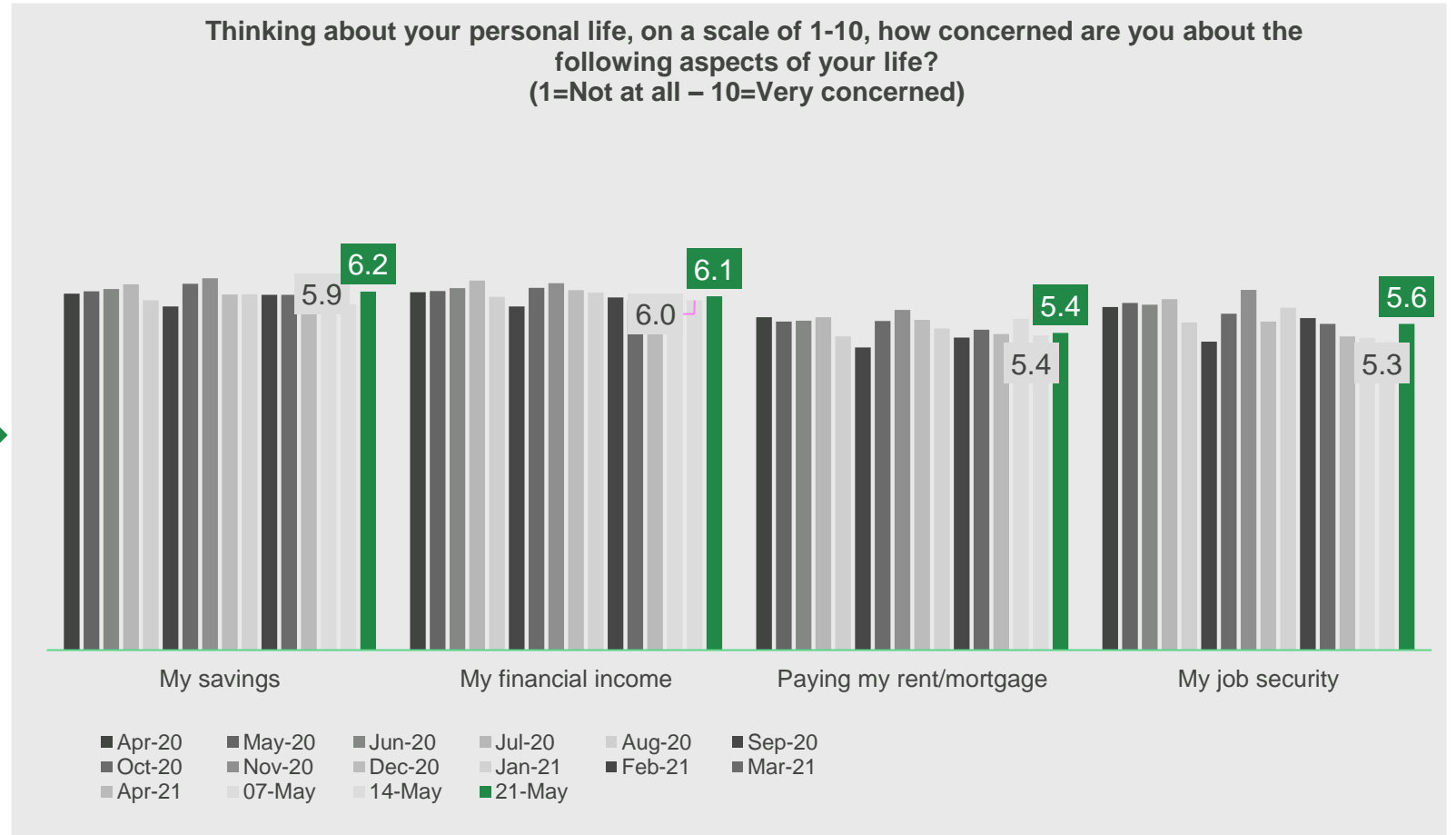
Despite increased optimism in future financial conditions, there has been an increase in concern around personal job security

7% 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

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

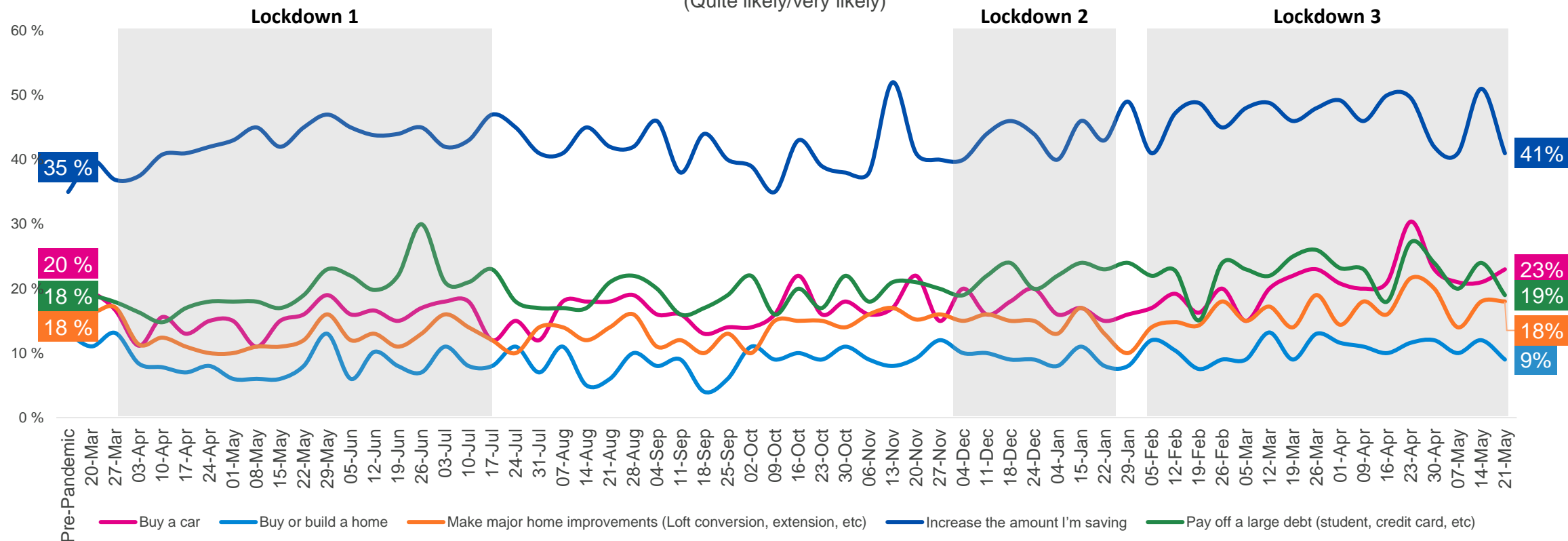




Plans to increase savings is down 10ppts and plans to pay off a large debt has decreased 5ppts

The percentage of people that plan to make major home improvements has increased 4ppts from 14% to 18%

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, 05/03: 250, 12/03:250, 01/04:250, 09/04:250, 16/04:250, 23/04:250, 30/04:250, 07/05:250, 14/05:250, 21/05:250

Confidence in Government & Broad Concerns



Confidence in the government has decreased 2ppts as some criticize their handling of the Indian variant

The vaccine roll-out continues to bolster people’s confidence in the government’s response to the pandemic:

“The Govt are doing their best on difficult and untested circumstances. Vaccination programme has been excellent, also hospital provision.”

“With the vaccination doing well, I believe that things are going to be okay in the future”

“Government has successfully taken all the steps to control Covid 19 situation. They didn’t do well in the first wave, but they did extremely well in the last 2 waves.”

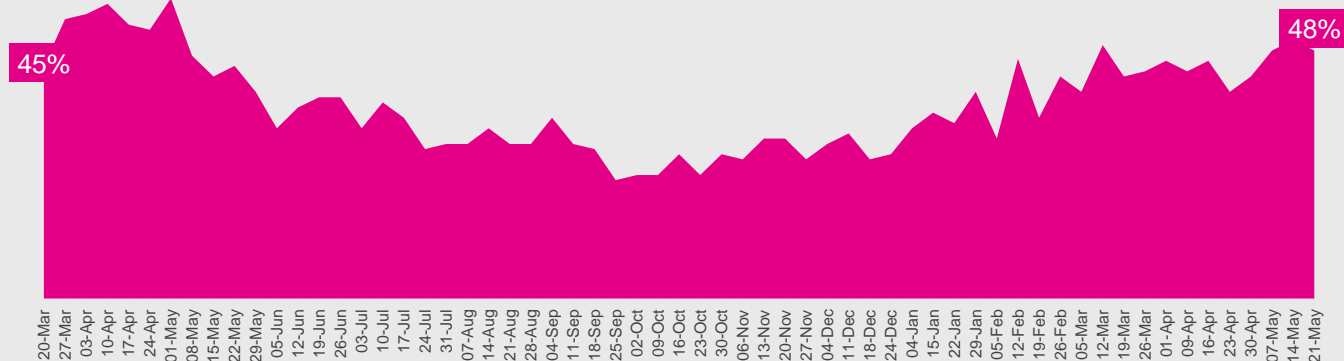
However, there is criticism around their handling of COVID-19 variants and travelling abroad:

“I don’t think they’re doing enough to prevent Covid variants from abroad. I don’t think travelling abroad should be encouraged yet”

“I think the governments primary plan to vaccinate everyone is flawed when they refuse to shut the borders”

“Another variant has entered the country and I think the government hasn’t done enough to prevent that.”

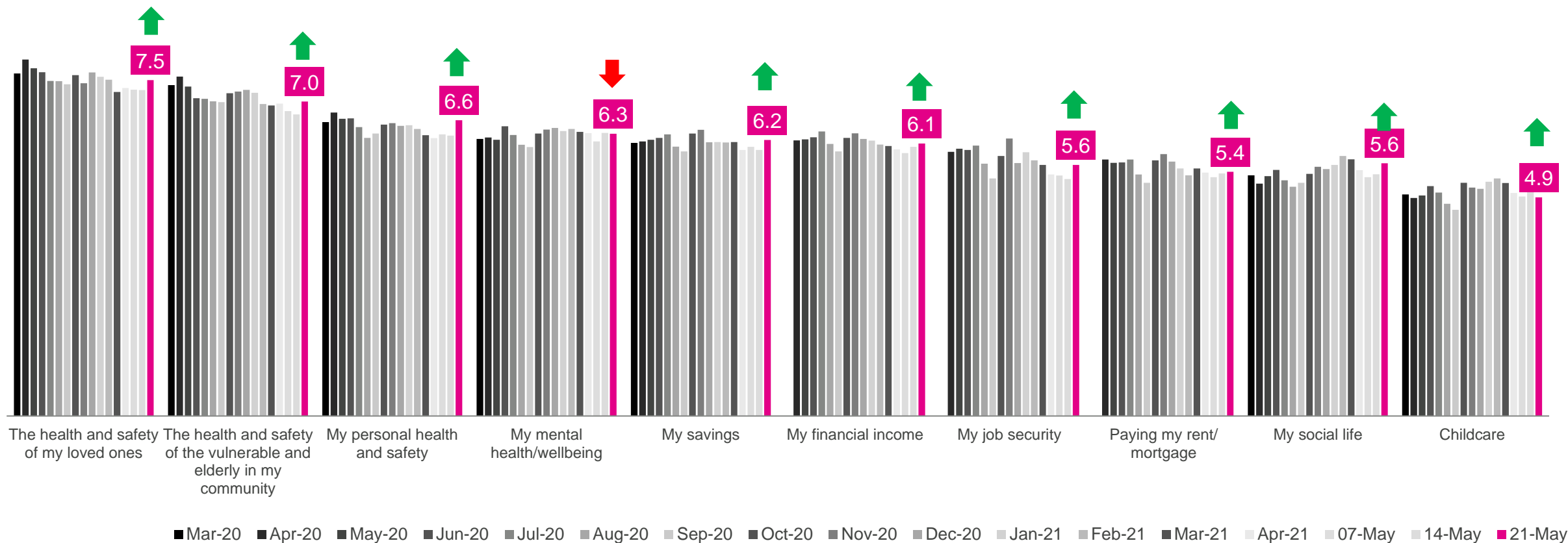
How confident are you in the government’s response to the COVID-19 outbreak? (% Confident)





In light of news on the Indian variant of COVID-19, concerns for personal health and safety and the health of loved ones has increased

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)



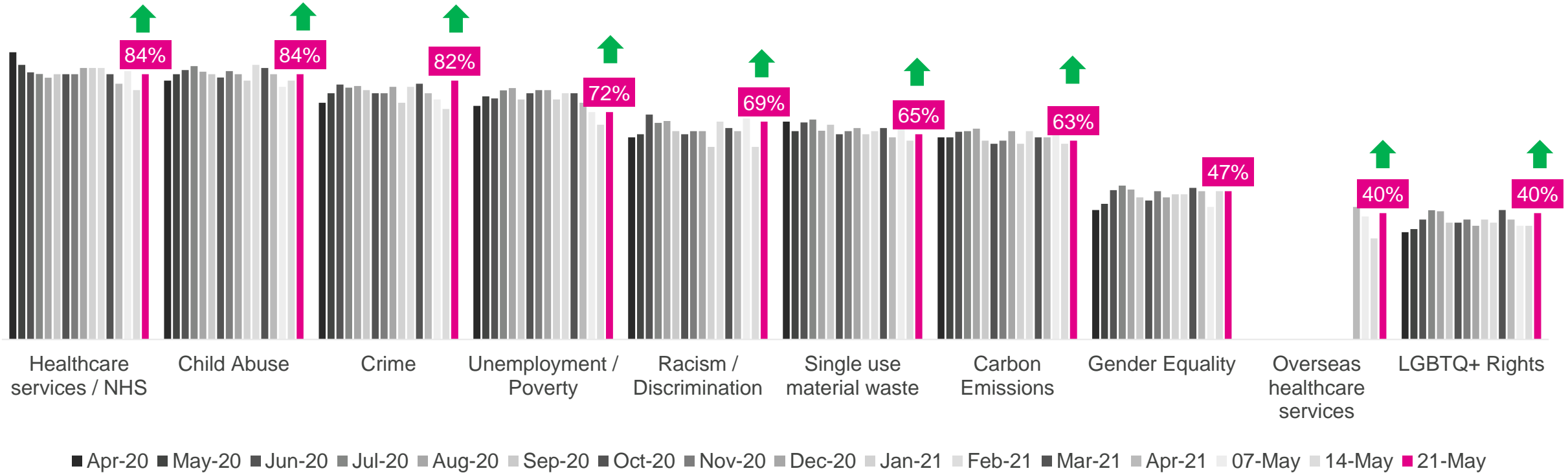
Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500. 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 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, 23/04: 250, 30/04:250, 07/05:250, 14/05:250, 21/05:250



Concerns over broader societal issues have increased across the board, with concerns for overseas healthcare spiking in the last 7 days

Concerns over overseas healthcare services has increased this week by 8ppts, from 32% to 40%

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, 23/04:250, 30/04:250, 07/05:250, 14/05:250, 21/05:250



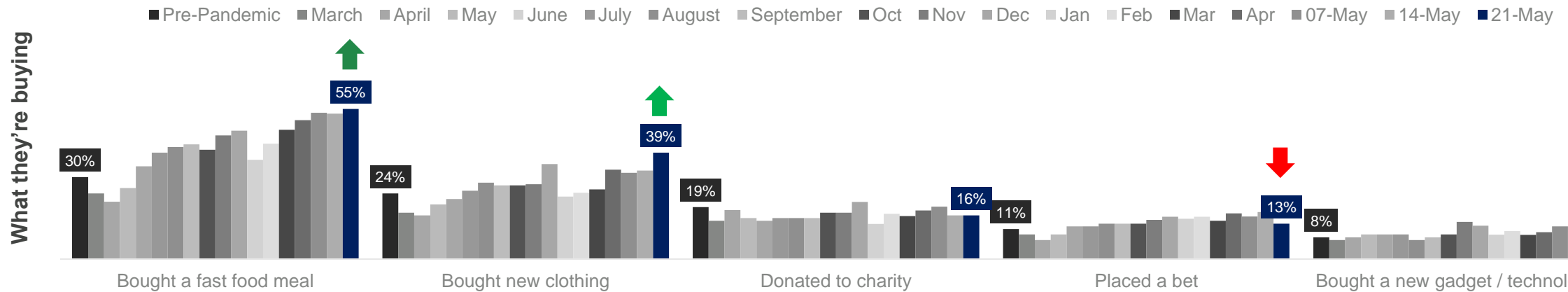
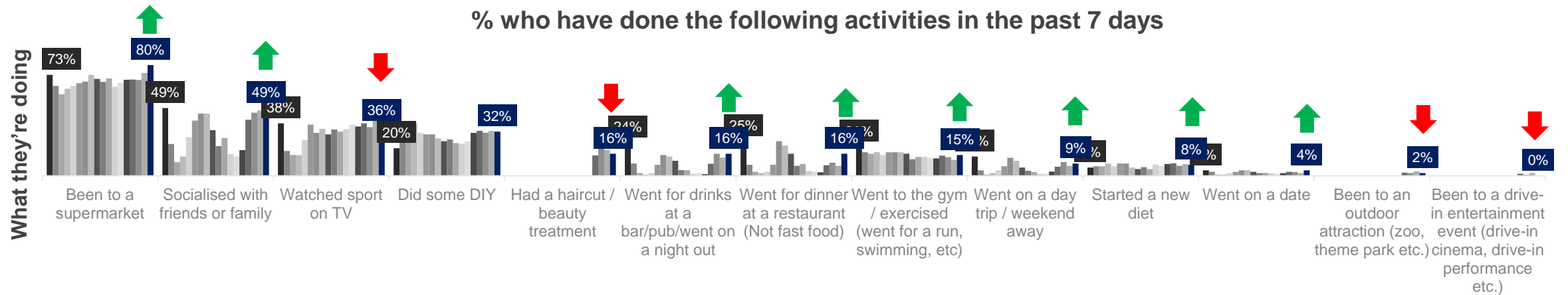
Changes in Behaviour



Following the reopening of indoor dining, there's been a 9ppt increase in the percentage of people going out for dinner – the highest level since October

Following a peak in watching sport on TV last week, there was a 5ppt decline in viewership this week and a 4ppt drop in the percentage of people placing a bet. The majority of this data was collected before the final day of the Premier League season on Sunday 23rd May.

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

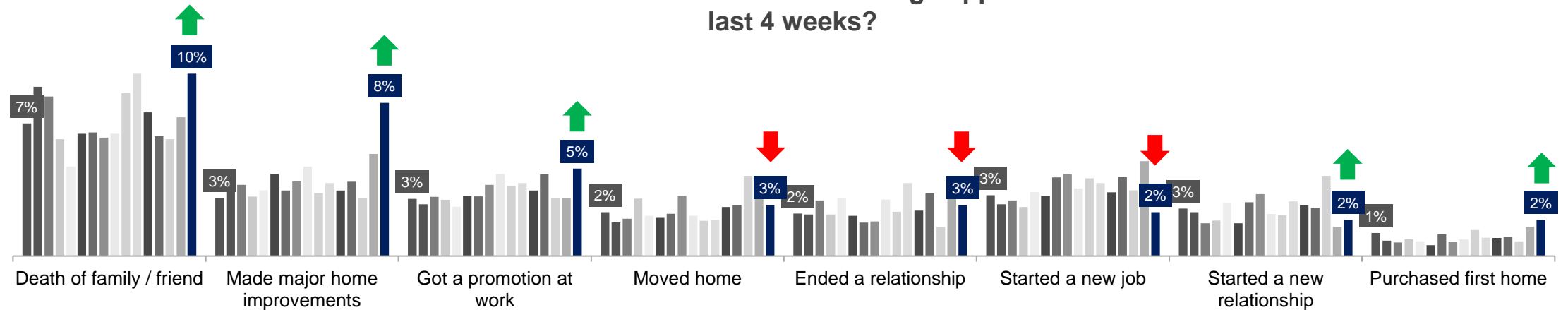




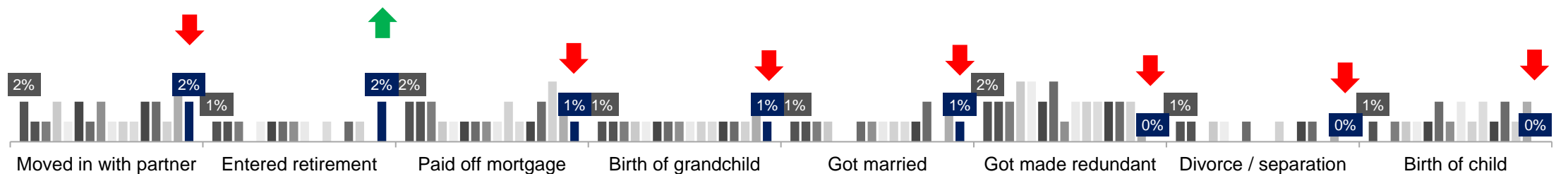
Unfortunately, there has been a rise in the percentage of people that have recently experienced the death of a loved one

There has been a 2ppt increase in the percentage of people making major home improvements, the highest level to-date

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



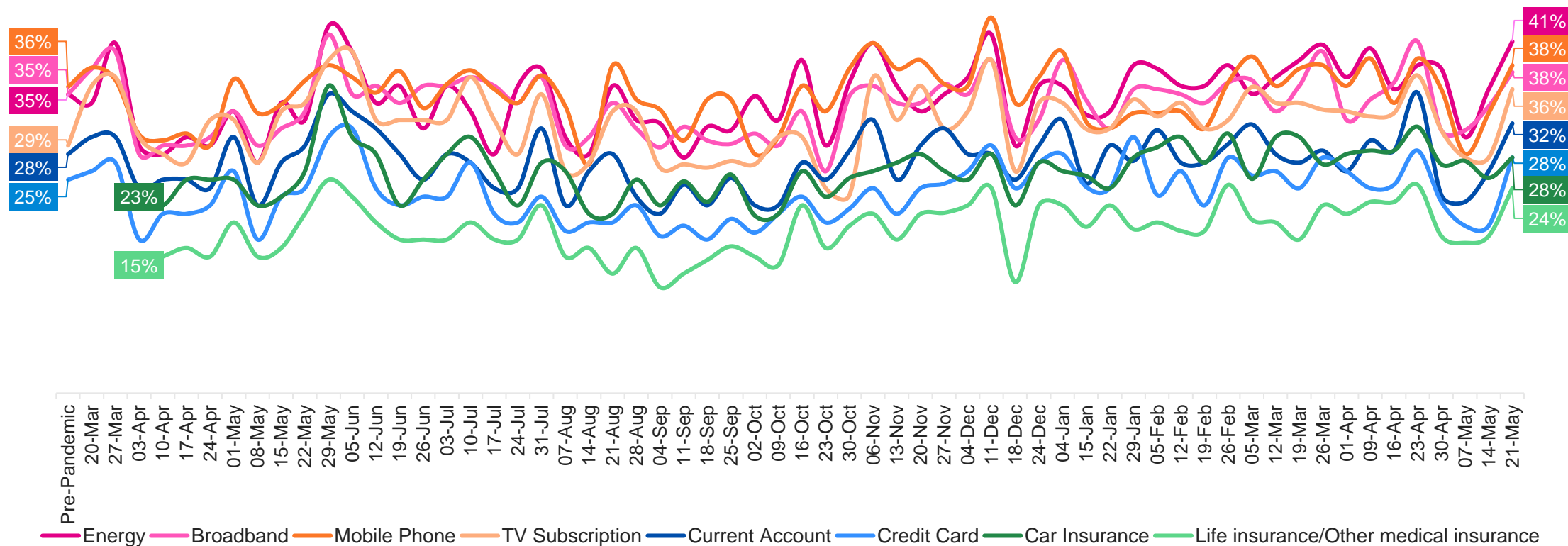
Legend: Apr-20, May-20, Jun-20, Jul-20, Aug-20, Sep-20, Oct-20, Nov-20, Dec-20, Jan-21, Feb-21, Mar-21, Apr-21, 07-May, 14-May, 21-May





Interest in switching providers has continued its incline, following a decline at the end of April and beginning of May

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

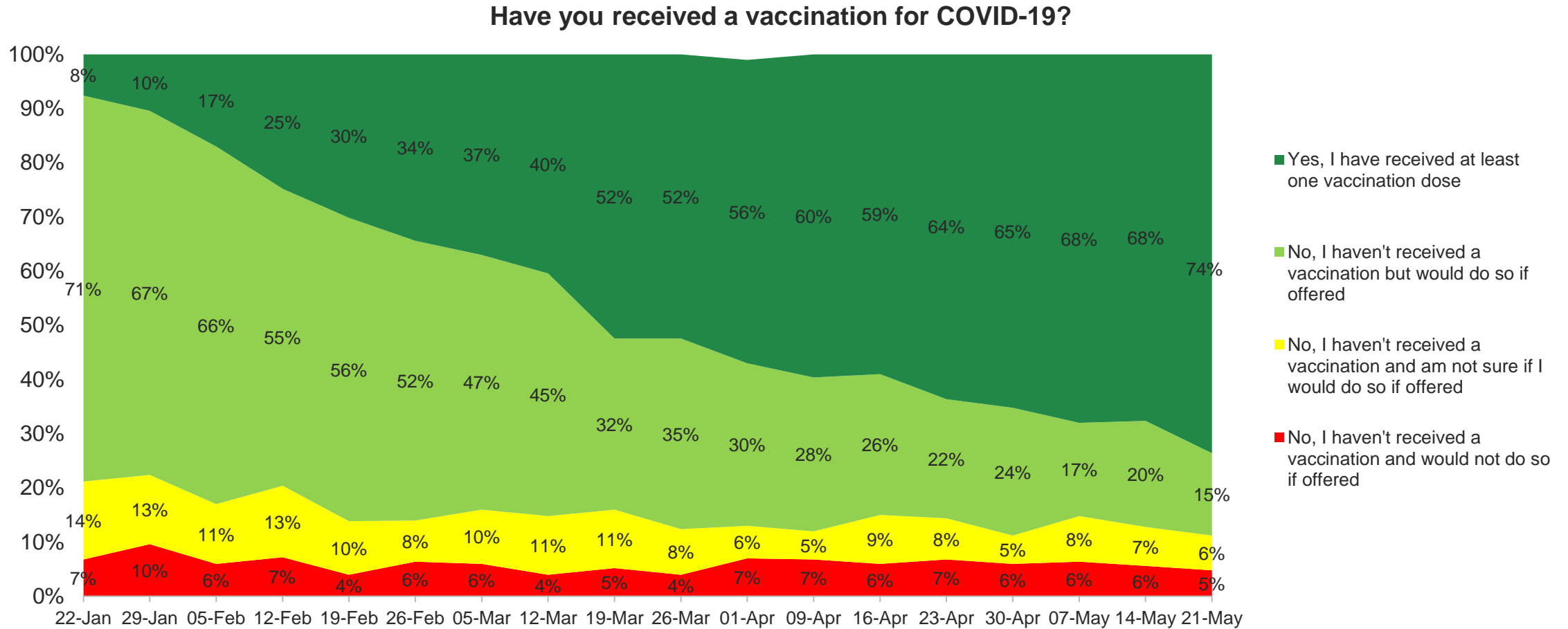




Looking ahead



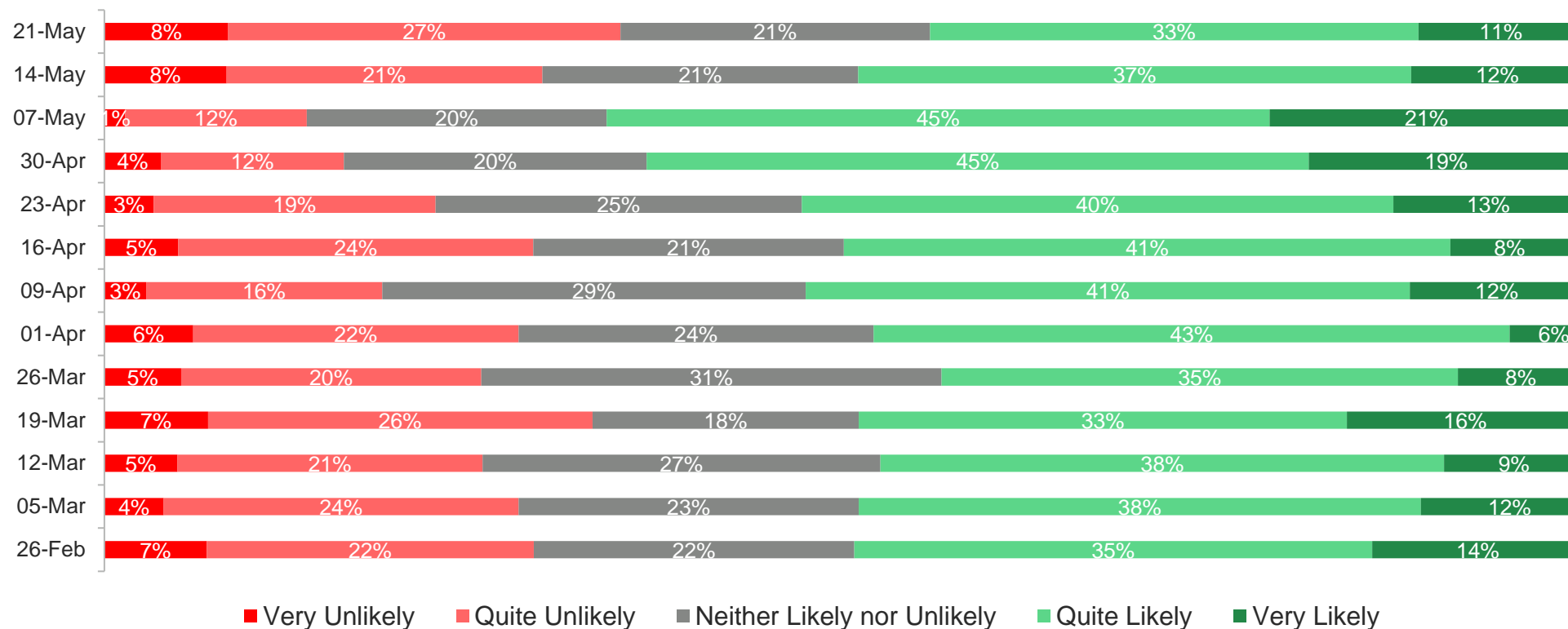
This week there has been a significant increase in the number of those who have received at least one dose of a COVID-19 vaccination this week



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, 23/04:250, 30/04:250, 07/05:250, 14/05:250, 21/05:250.

Confidence that the current national lockdown restrictions will be lifted on 21st June has dropped slightly again this week around news of new variants

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

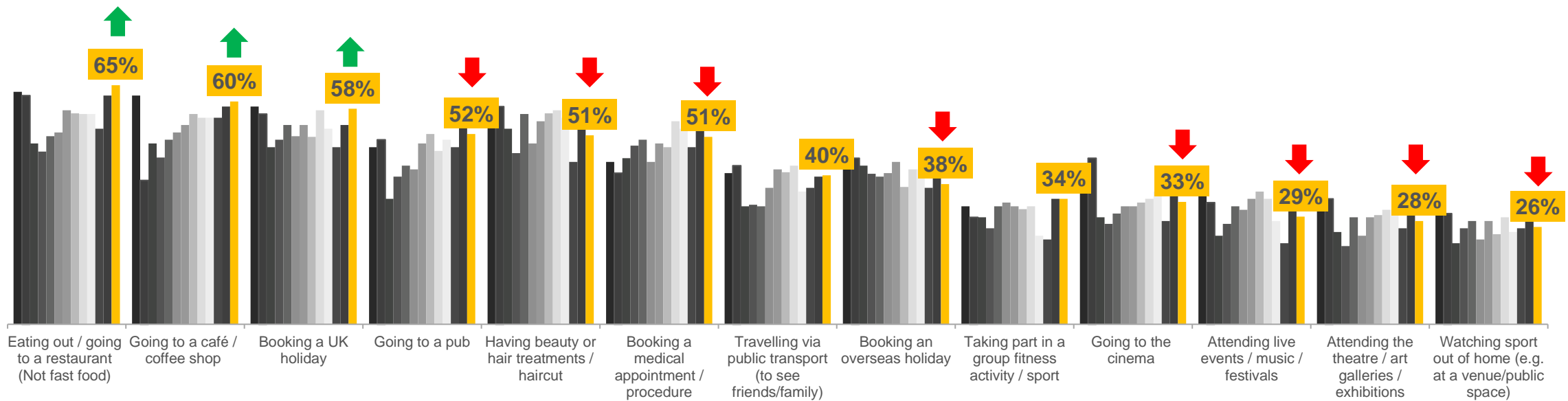


Following the easing of restrictions last week, and hospitality opening their doors to inside bookings, the number of people eating out and going to a café has increased this week

After updates on the “red, amber and green list rules” for re-entering England after a holiday, there has been an increase in interest in booking a UK holiday, and declines in those looking to book an overseas holiday.

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 ■ 30-Apr ■ 07-May ■ 14-May ■ 21-May

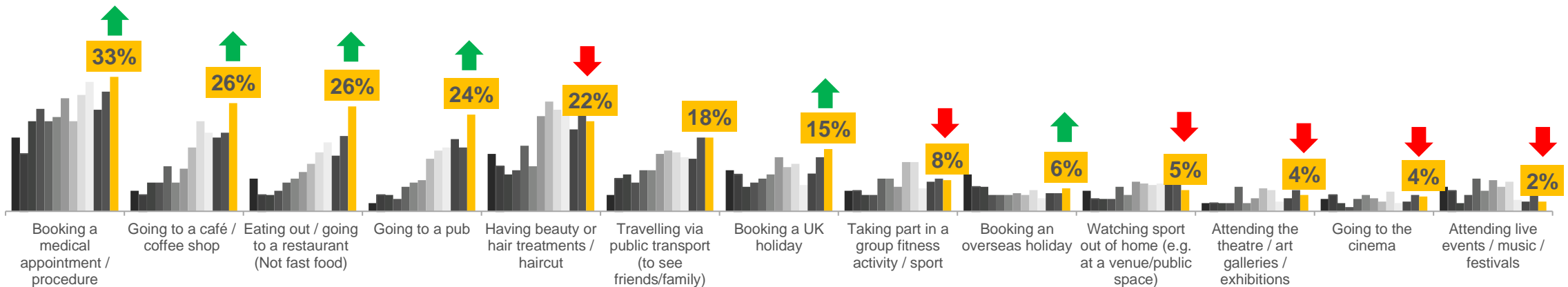


The number of people booking to eat or drink out has increased significantly this week after the easing of indoor hospitality restrictions

Those booking visits to cafes, restaurants and pubs has increased this week (+7ppts, +8ppts, +8ppts respectively). The percentage of people booking UK holidays continues to rise, which is now at 15%.

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 ■ 30-Apr ■ 07-May ■ 14-May ■ 21-May

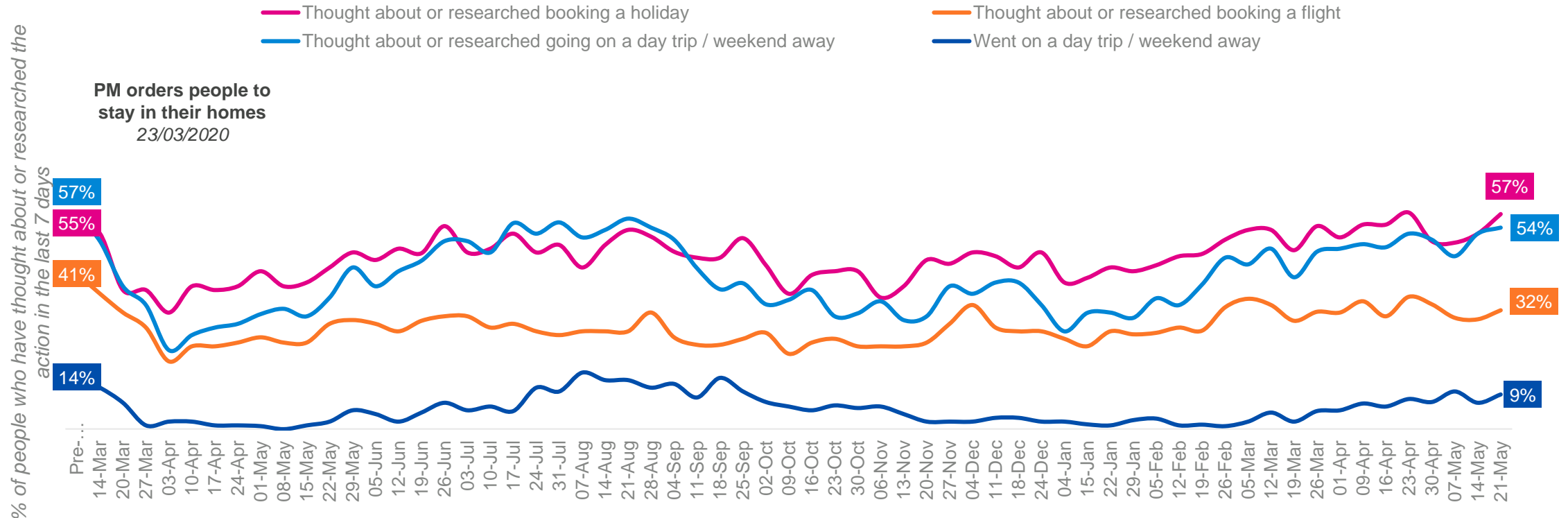




The weekend before bank holiday weekend has driven interest in booking holidays and trips away

There have been increases across the board this week for interest in, and visits on 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



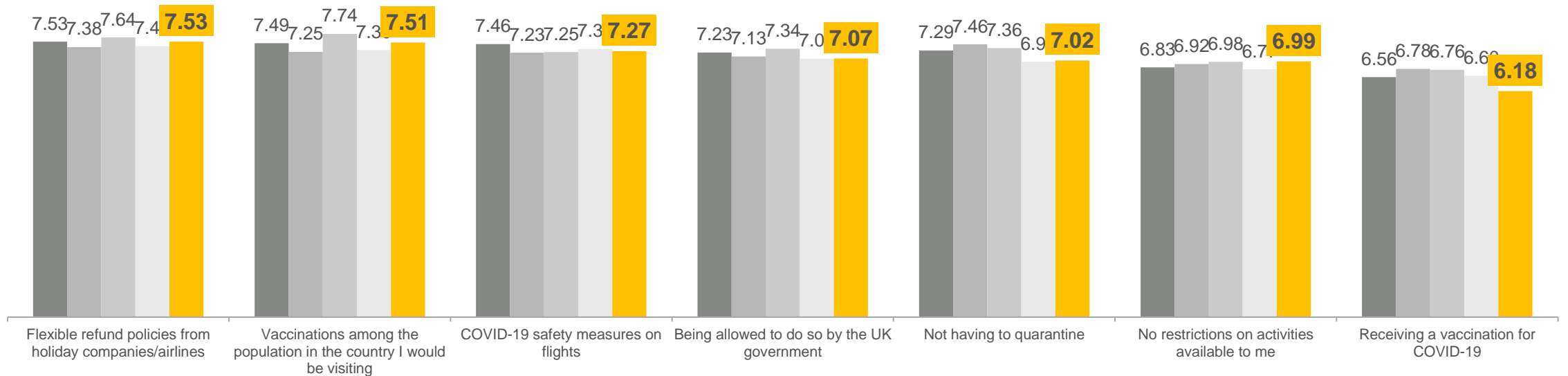


Flexible refund policies continue to be the most important aspect to make travellers feel comfortable in booking an overseas holiday

On a scale of 0 to 10, where 0 is 'Not at all' and 10 is 'Completely' how important are the following in making you feel comfortable booking an overseas holiday?

Mean Score

■ 23-Apr ■ 30-Apr ■ 07-May ■ 14-May ■ May-21



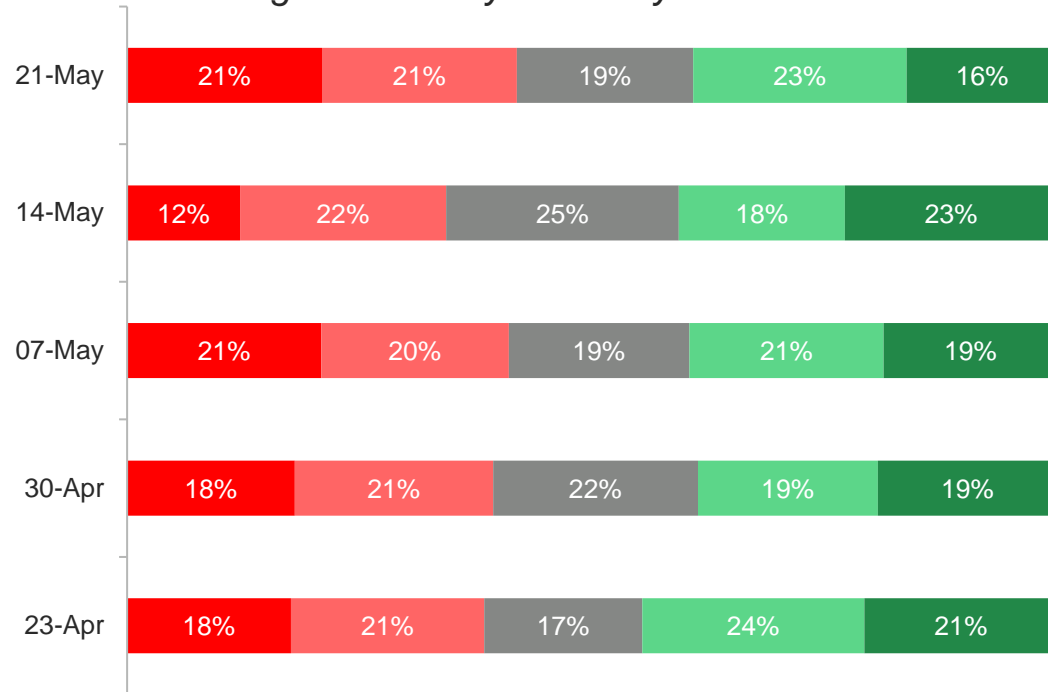
Source: OMD Radar Survey. Those who ever take overseas holidays. 23/04:200, 30/04:200, 07/05:210, 14/05:202, 21/05: 197.



There have been small declines in the percentage of travellers who feel comfortable taking long haul flights

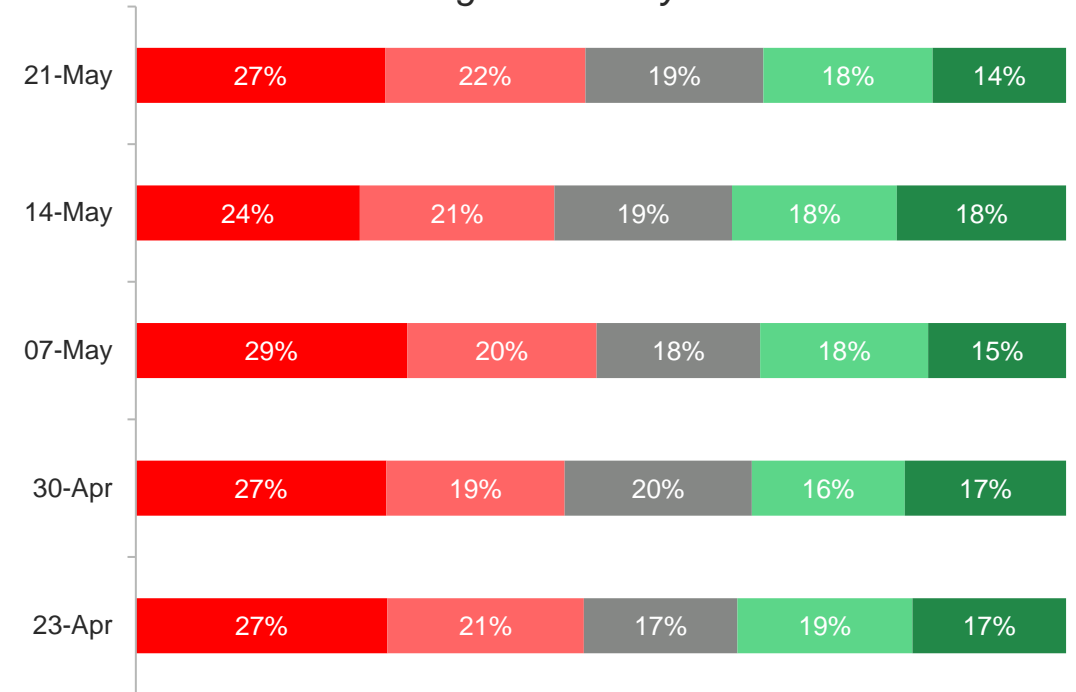
How comfortable would you feel taking a long haul flights (e.g. to Asia, Australia etc.) from 2022 onwards?

Been on long-haul holiday in last 5 years or wanted to



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

Ever go on holiday



■ Very uncomfortable ■ Not very comfortable ■ Neither comfortable nor uncomfortable ■ Somewhat comfortable ■ Very comfortable

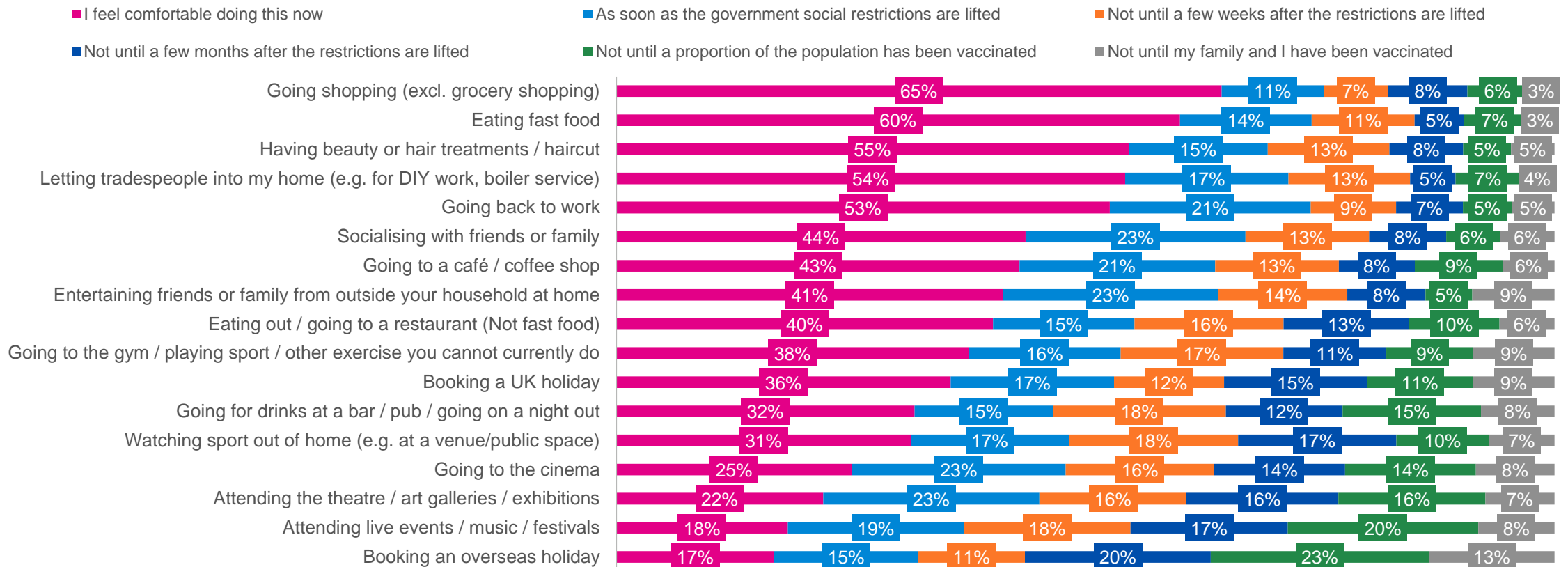
Source: OMD Radar Survey. Those who ever take holidays. 23/04: 218, 30/04:219, 07/05:216, 14/05:220, 21/05:209, Been on a long-haul holiday in the last 5 years, 23/04: 159, 30/04:150, 07/05:139, 14/05:140, 21/05: 148.



As restrictions have lifted on indoor hospitality, we see a jump in those who feel comfortable eating out and going for drinks at a bar, pub or night out

There were increases in the percentage of people that currently feel comfortable attending indoor spaces this week, with a 7ppt increase in those comfortable going for drinks at a bar / pub, and 11ppt increase in eating out/going to a restaurant.

When would you feel comfortable doing the following again?



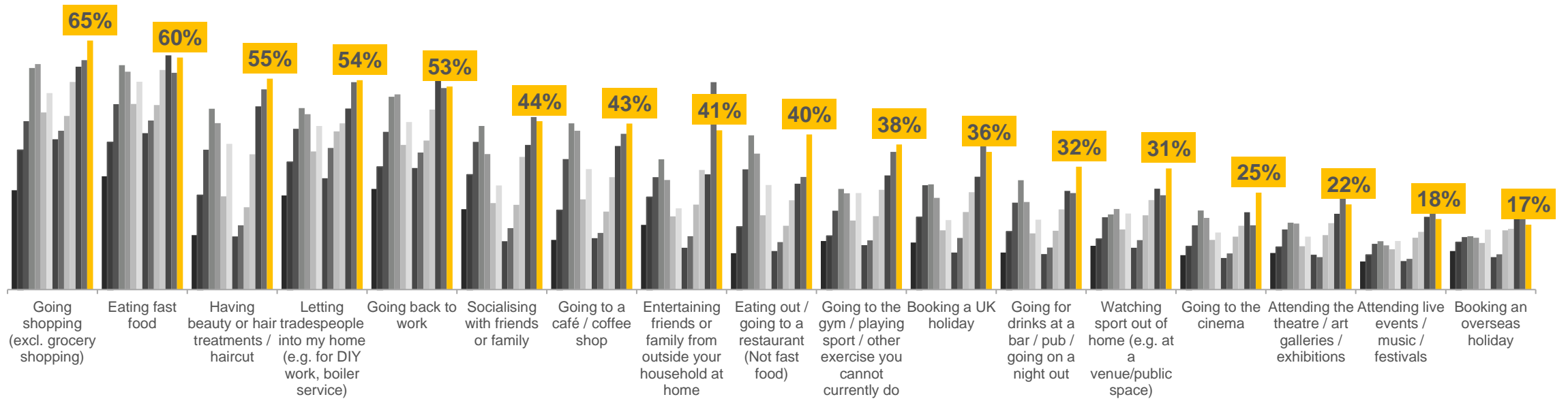


People are feeling more comfortable in public social situations ahead of the easing of social restrictions in Step 3 on the road out of lockdown

The percentage of people that feel comfortable going to the cinema has increased 8ppts, watching sports outside of home increased by 7ppts and going to the gym 2ppts.

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 ■ Apr-21 ■ 07-May ■ 14-May ■ 21-May



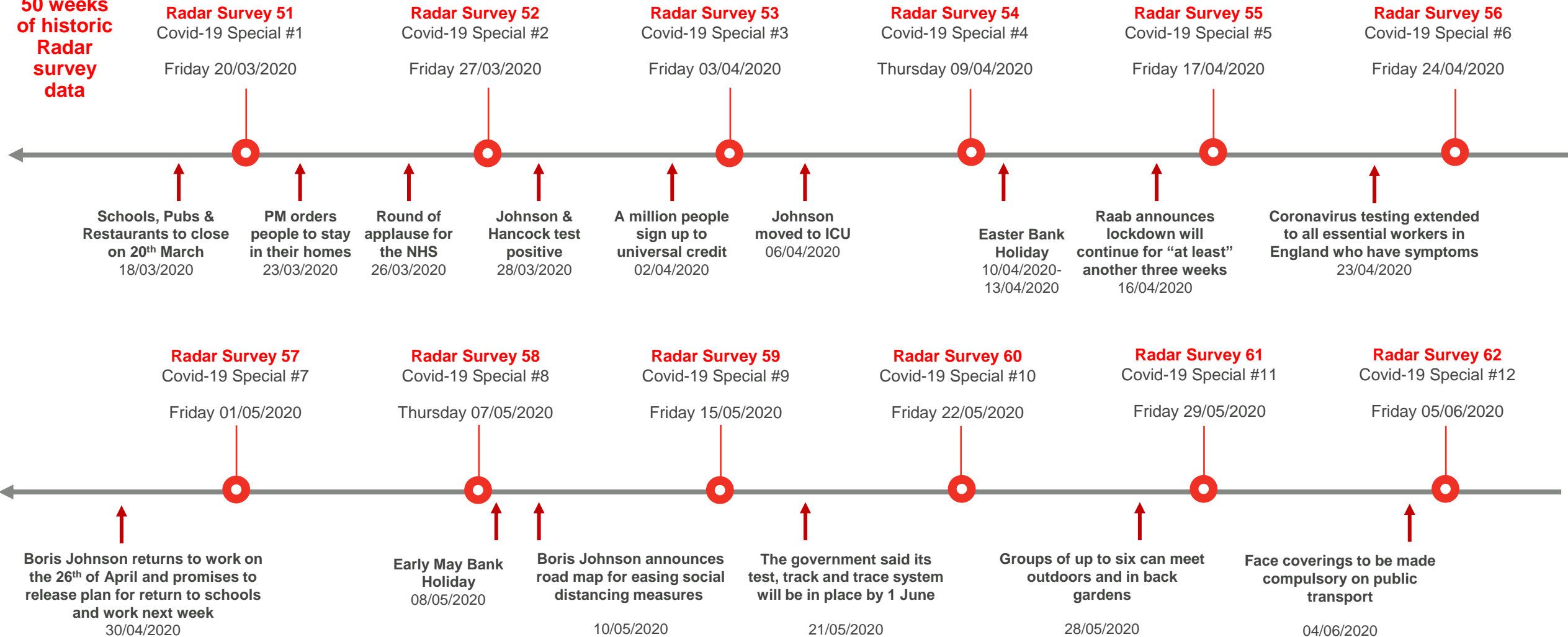
Source: OMD Radar Survey. June 2020 – May 2021. Amongst those who would usually conduct each activity (bases all above 150).

Appendix



Survey Timeline

50 weeks
of historic
Radar
survey
data





Survey Timeline

62 weeks
of historic
Radar
survey
data

Radar Survey 63
Covid-19 Special #13
Friday 12/06/2020



Non-essential
retailers reopen
15/06/2020

Radar Survey 64
Covid-19 Special #14
Friday 19/06/2020



Social Distancing reduced to
'one-metre plus'
23/06/2020

Radar Survey 65
Covid-19 Special #15
Friday 26/06/2020



Radar Survey 66
Covid-19 Special #16
Friday 03/07/2020



Pubs, restaurants and other
businesses reopen
04/07/2020

Radar Survey 67
Covid-19 Special #17
Friday 10/07/2020



PM says face coverings
'should be worn' in shops
13/07/2020

Radar Survey 68
Covid-19 Special #18
Friday 17/07/2020



Radar Survey 69
Covid-19 Special #19
Friday 24/07/2020



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

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

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



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

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



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



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

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

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



Radar Survey 74
Covid-19 Special #24
Friday 28/08/2020



Bank Holiday
31/09/2020



Survey Timeline

74 weeks
of historic
Radar
survey
data

Radar Survey 75
Covid-19 Special #25
Friday 04/09/2020

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

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

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

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

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

'Eat Out to Help
Out' ends for
most
restaurants

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

Revised government
restrictions on social
gatherings come into
place

PM warns UK to
follow COVID
restrictions or risk
second lockdown

Chancellor of the
Exchequer
announces Winter
Economy Plan

Extended local
lockdown
measures in the
North East

Boris to announce
tiered approach to
lockdown
measures

01/09/2020

09/09/2020

14/09/2020

22/09/2020

24/09/2020

01/10/2020

12/10/2020

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

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

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

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

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

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

London moved to
Tier 2 COVID alert
level

Greater Manchester and
areas in the Midlands move
to Tier 3

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

National lockdown in
England begins

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

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

15/10/2020

20/10/1010-23/10/2020

31/10/2020

05/11/2020

09/11/2020

18/11/2020



Survey Timeline

86 weeks
of historic
Radar
survey
data

Radar Survey 87
Covid-19 Special #37
Friday 27/11/2020



Black Friday
27/11/2020

Radar Survey 88
Covid-19 Special #38
Friday 04/12/2020



**First NHS patient
receives COVID-19
vaccination**
08/12/2020

Radar Survey 89
Covid-19 Special #39
Friday 11/12/2020



**Self-isolation
period
reduced from
14 to 10 days**
11/12/2020

Radar Survey 90
Covid-19 Special #40
Friday 18/12/2020



**London, South
Essex, and South
Hertfordshire move
to Tier 3**
16/12/2020

Radar Survey 91
Covid-19 Special #41
Thursday 24/12/2020



**Boris announces a
stricter Christmas,
with the introduction
of Tier 4**
19/12/2020

Radar Survey 92
Covid-19 Special #42
Monday 04/01/2021



**National Lockdown introduced
in England
AstroZeneca / Oxford University
Vaccine roll out starts**
04/01/2021

Radar Survey 93
Covid-19 Special #43
Friday 15/01/2021



**PM announces
temporary close of all
UK travel corridors**
15/01/2021

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



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

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



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

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



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

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



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

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



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



Survey Timeline

98 weeks
of historic
Radar
survey
data

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

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

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

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

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

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

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

22/02/2021

Children return to schools
08/03/2021

12 months on from PM
ordering people to stay
in their homes
23/03/2021

Lockdown restrictions
are eased to allow rule
of 6 outdoors
29/03/2021

Easter Bank Holiday
weekend
02/04/2021

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

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

Radar Survey 107
Covid-19 Special #57
Friday 23/04/2020

Radar Survey 108
Covid-19 Special #58
Friday 30/04/2020

Radar Survey 109
Covid-19 Special #59
Friday 07/05/2020

Radar Survey 110
Covid-19 Special #60
Friday 14/05/2020

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

PM announces
vaccinations received by
33 million people to-date
20/04/2021

May Bank Holiday
03/05/2021

Government confirms
traffic light list ahead of
cautious return to
international travel
07/05/2021

England enters Step 3 on
the road out of lockdown
17/05/2021



Survey Timeline

111 weeks
of historic
Radar
survey
data

Radar Survey 111
Covid-19 Special #61
Friday 21/05/2021

Boris Johnson announces
plan for a new 'Global
Pandemic Radar' to
identify and track new
COVID variants and
emerging diseases.

21/0252021

