

**COVID-19 Consumer Impact Report**  
w/c 31.05.21

**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 112 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 28th of May to Sunday 30th of May 2021.

## Summary: Happiness was high this Bank Holiday and consumer confidence remained steady but mixed emotions towards the easing of lockdown are evident

- 01** **Happiness levels have overtaken pre-pandemic levels** after a 2ppt increase this week, though levels of life satisfaction and optimism are down
  - 02** **Confidence in the government has decreased 6ppts**, with criticism around their handling of COVID-19 variants and travelling abroad, bolstered by the new Cummings evidence
  - 03** **There was less reliance on public spaces or remote communication to connect with friends or family over the latest Bank Holiday** than the Bank Holidays in April and the beginning of May
  - 04** **23%** of the population stated that **worry is the most prominent emotion towards the easing of lockdown restrictions that have taken place in May** but a significant proportion of the population are pleased with this change (17% positive, 12% relieved, 9% happy) and many others are unfazed (17% OK/fine and 9% relaxed)
  - 05** Though there have been declining levels of interest in out of home activities week, **the number of people booking to out of home activities at venues**, such as the cinema (+3ppts), live events (+3ppts), theatre (+1ppt) or watching sport out of home (+3ppts), **has increased**
  - 06** **There have been increasing percentages of people that feel comfortable returning to out of home activities** since the decline in January 2021, with considerable increases for social activities and hospitality settings in May
-

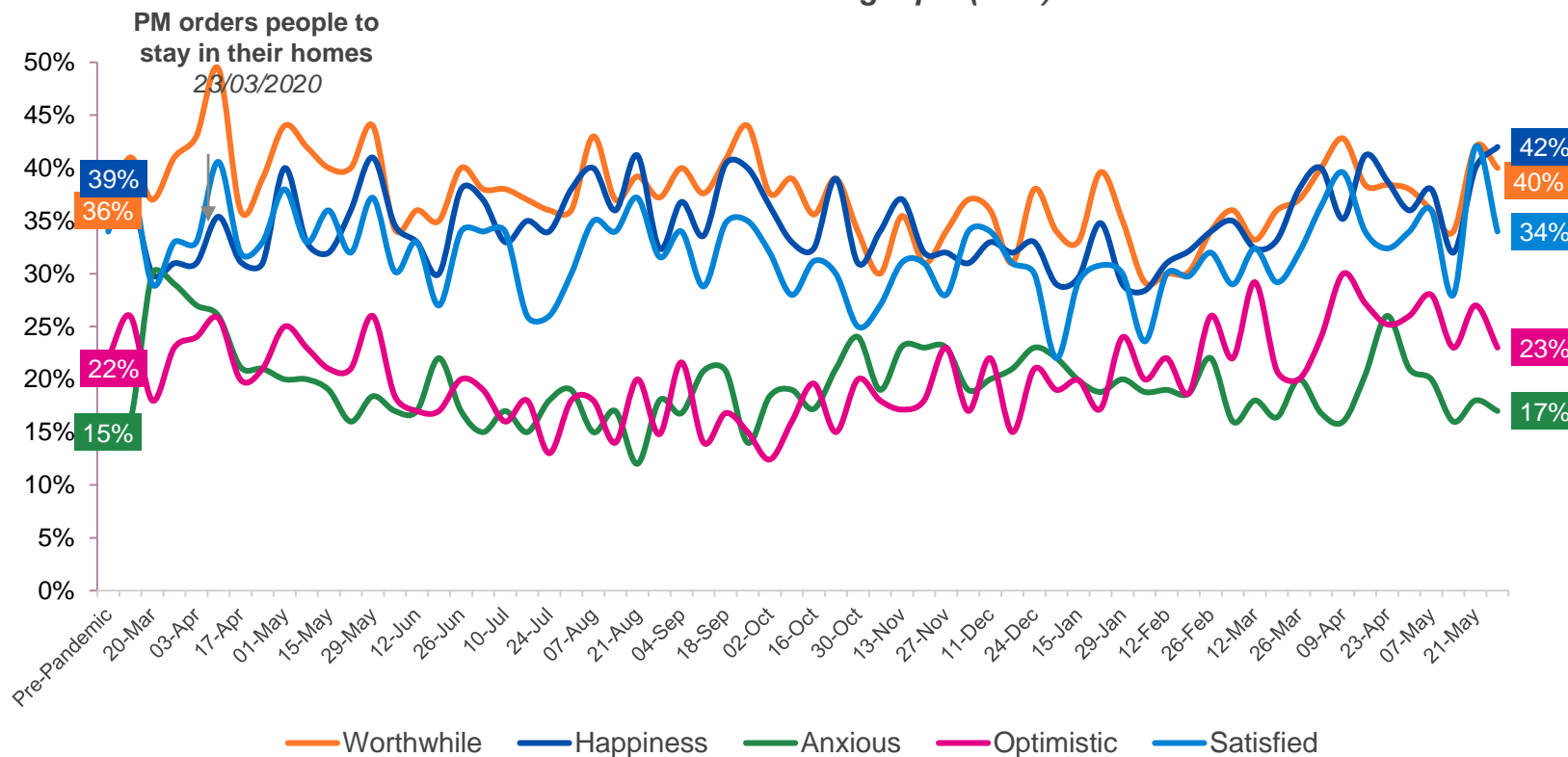


**Life satisfaction,  
optimism & consumer  
confidence**



# Happiness levels have peaked this week, now at 42%, which overtakes pre-pandemic levels

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



- ↑ Happiness levels have increased 2ppts, now at the highest since tracking at 42%
- ↓ Optimism has seen a 4ppt decrease this week, from 27% to 23%.
- ↓ Life satisfaction has dropped 8 ppts from 42% to 34%, after a 14ppt increase last week
- ↓ Anxiety levels have dropped slightly this week, from 18% to 17%



# Feelings of financial security and optimism around future financial conditions have decreased 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)



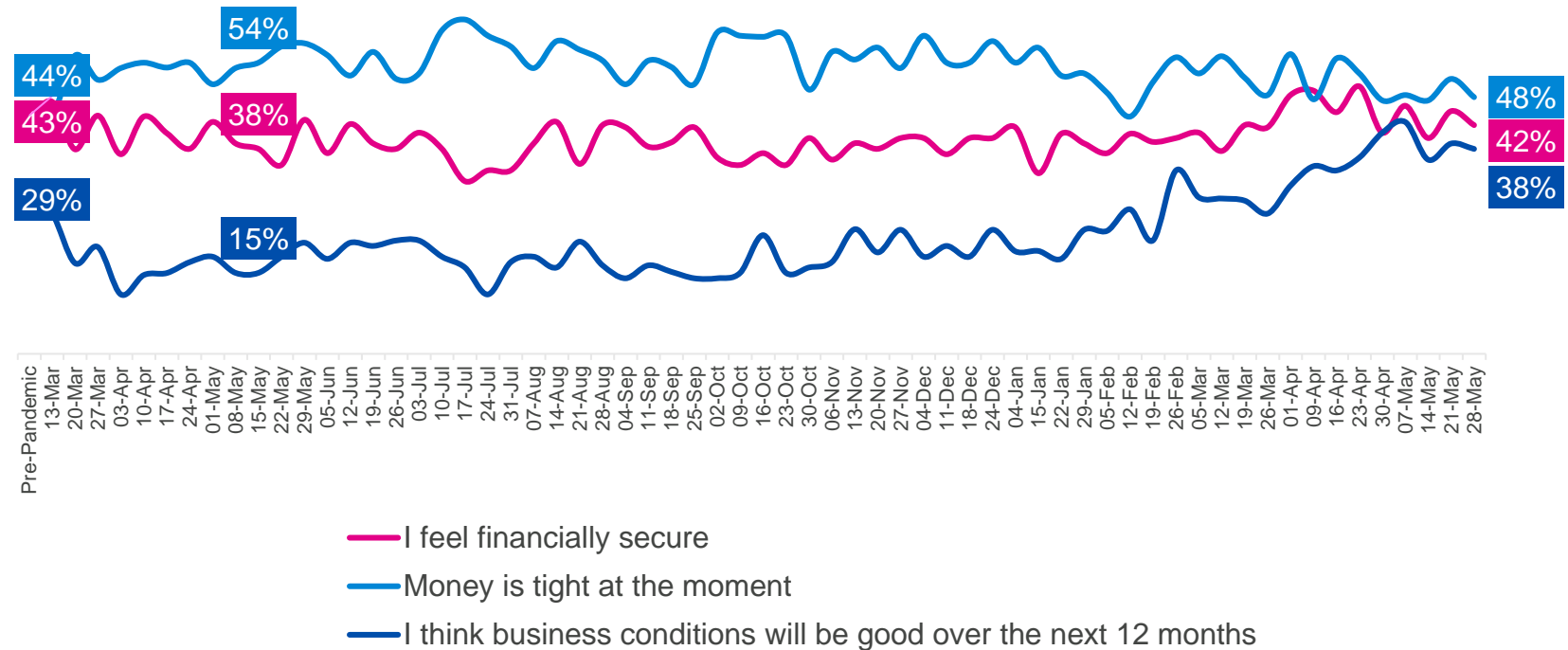
There has been a 3ppt decrease in the percentage of people feeling financially secure, falling from 45% to 42% this week



The percentage of people stating that money is tight at the moment decreased slightly this week, from 51% to 48%



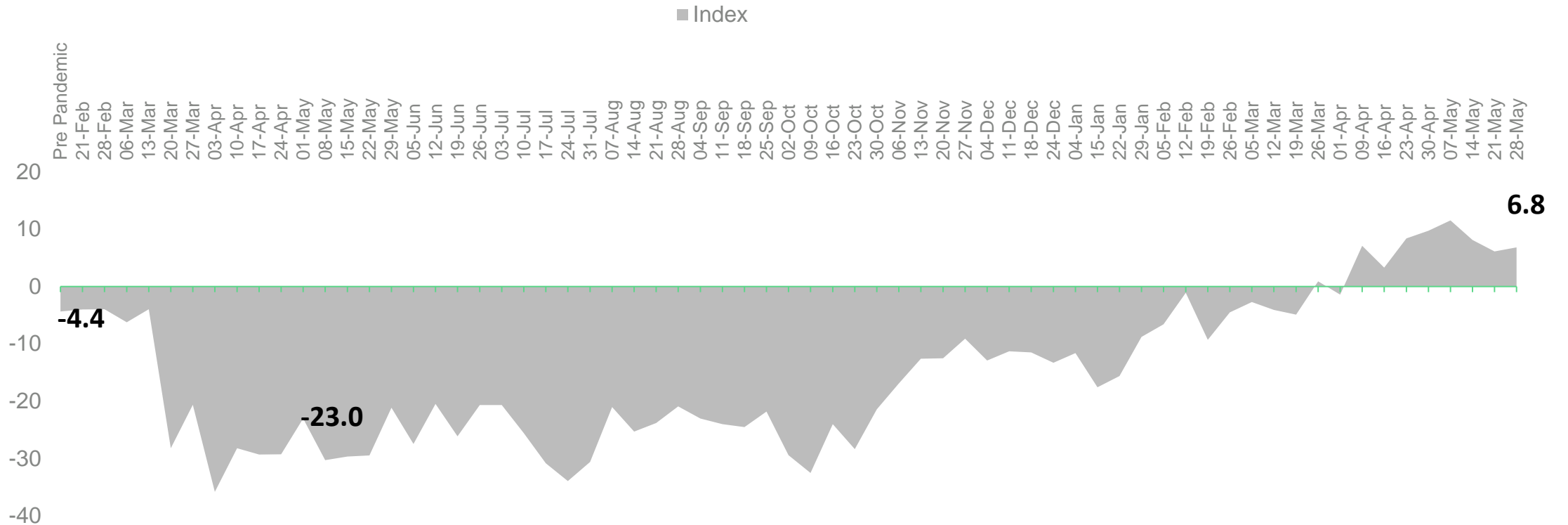
Confidence in future business conditions has decreased this week from 39% to 38%







# Consumer confidence has increased this week, moving from 6.1 to 6.8



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.



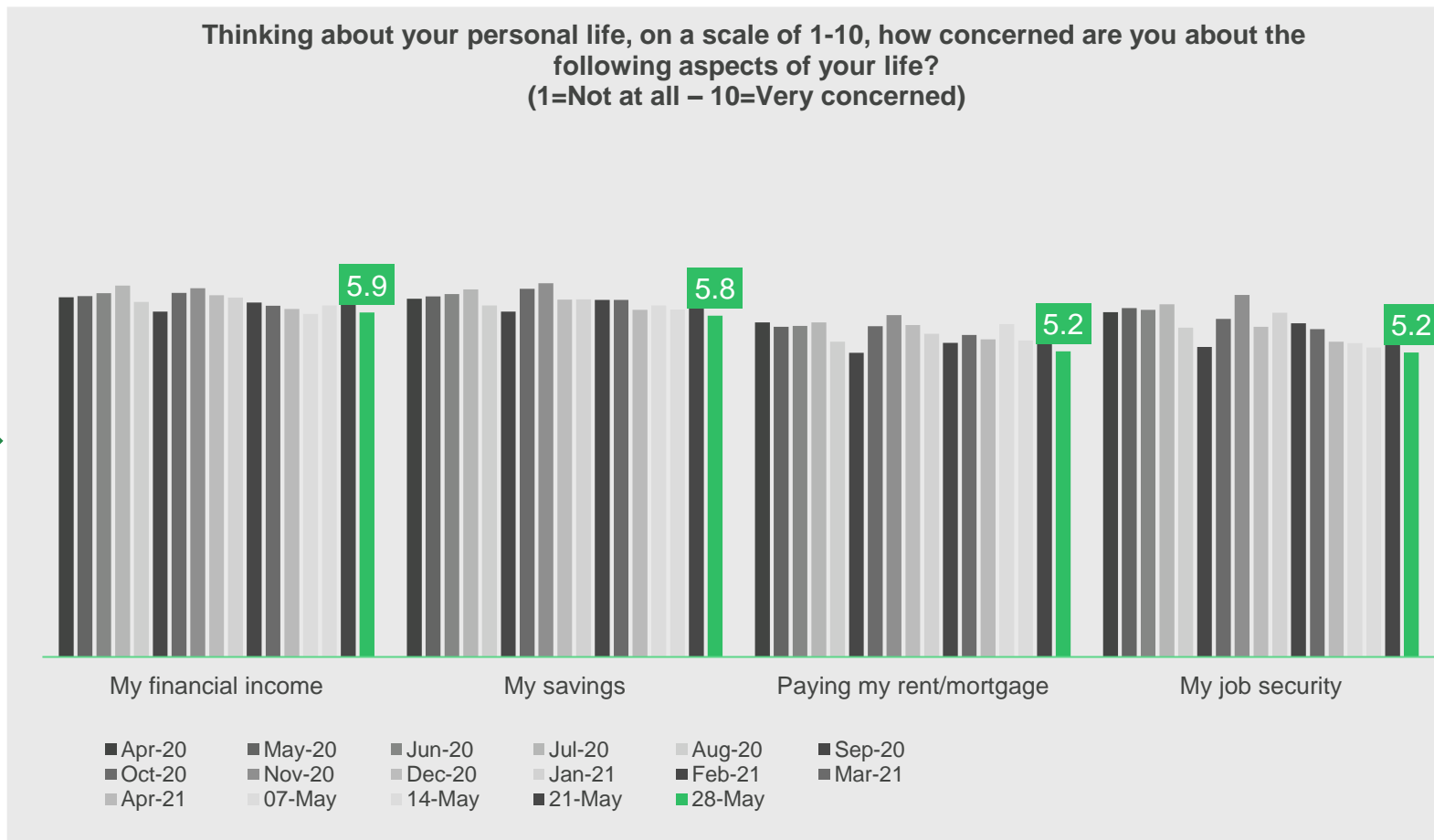
# With fieldwork overlapping many people's pay day, concerns over financial income and savings declined this week

**7%** of households have someone that has been **furloughed**

**2%** of households contain someone that has had their **salary reduced** since the COVID-19 outbreak

**5%** of households include someone that has **been made redundant** since the COVID-19 outbreak began

**62%** say that their employer has been **supportive** during the COVID-19 outbreak



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, 28/05:250.



# Confidence in Government & Broad Concerns



# Confidence in the government has decreased 6ppts, with many still criticising government decisions

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

*“They managed somehow to lessen the effect of the pandemic by the long lockdowns they took and honestly they are doing a great deal in the vaccination thing”*

*“Not confident in their response but very happy with their vaccination programme”*

Some feel they did their best in an impossible situation:

*“They are doing the best they can in an unprecedented situation but have made a few errors but nothing others may have made”*

*“I think they have done the best they could have done, we have never had to deal with this problem before in our lifetime, so no it wasn’t perfect but was dealt with in the best way possible”*

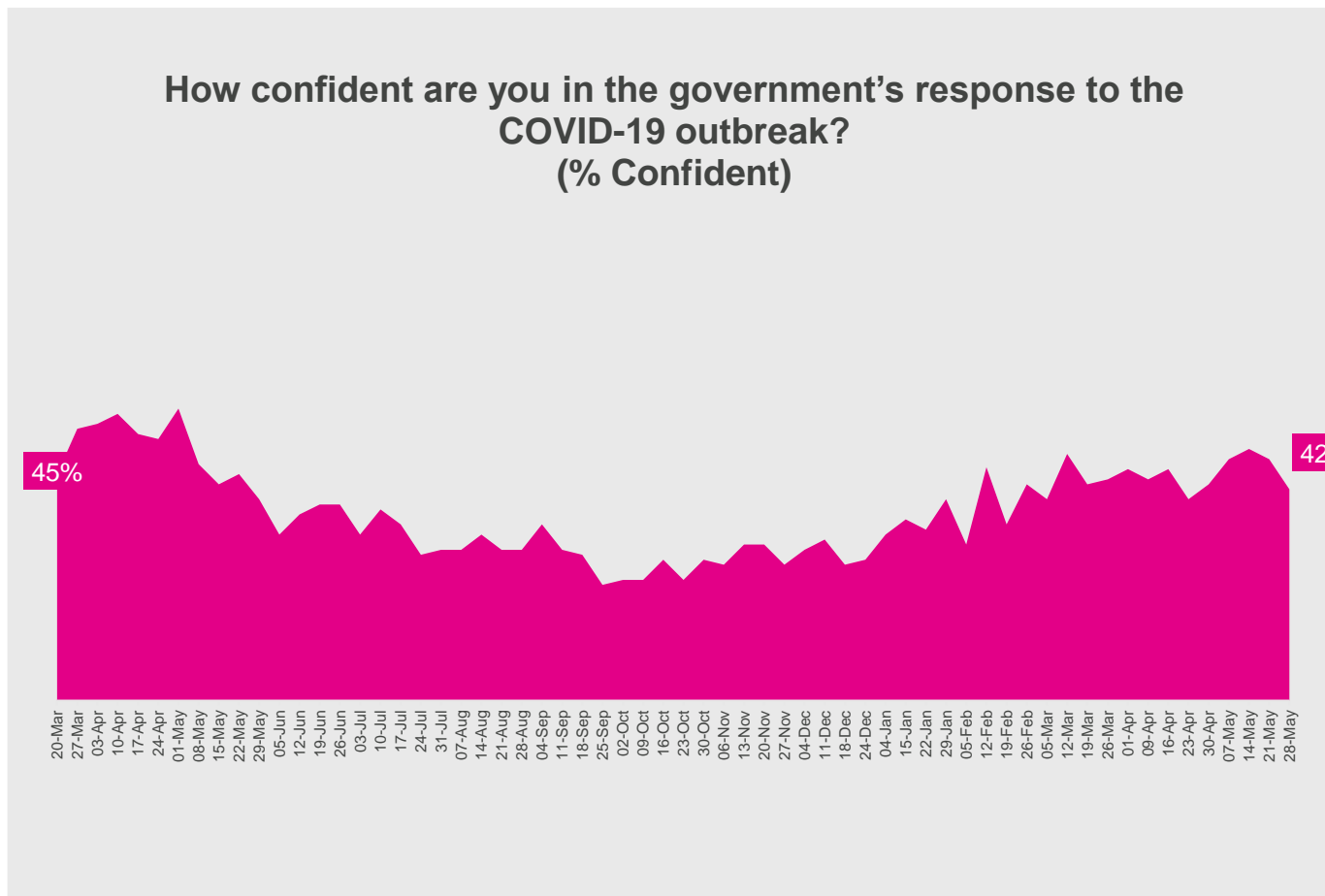
However, there is criticism around their handling of COVID-19 variants and travelling abroad, bolstered by the new Cummings evidence:

*“Where to start - delayed lockdowns in early 2020; still allowing flights from india in current wave and Dominic Cummings evidence”*

*“Because this government acted too late & have allowed flights to come in to the UK unchecked!”*

*“It’s not helped with all the things Dominic Cummings has been saying lately! It sounds like they were not very well organised with their response.”*

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

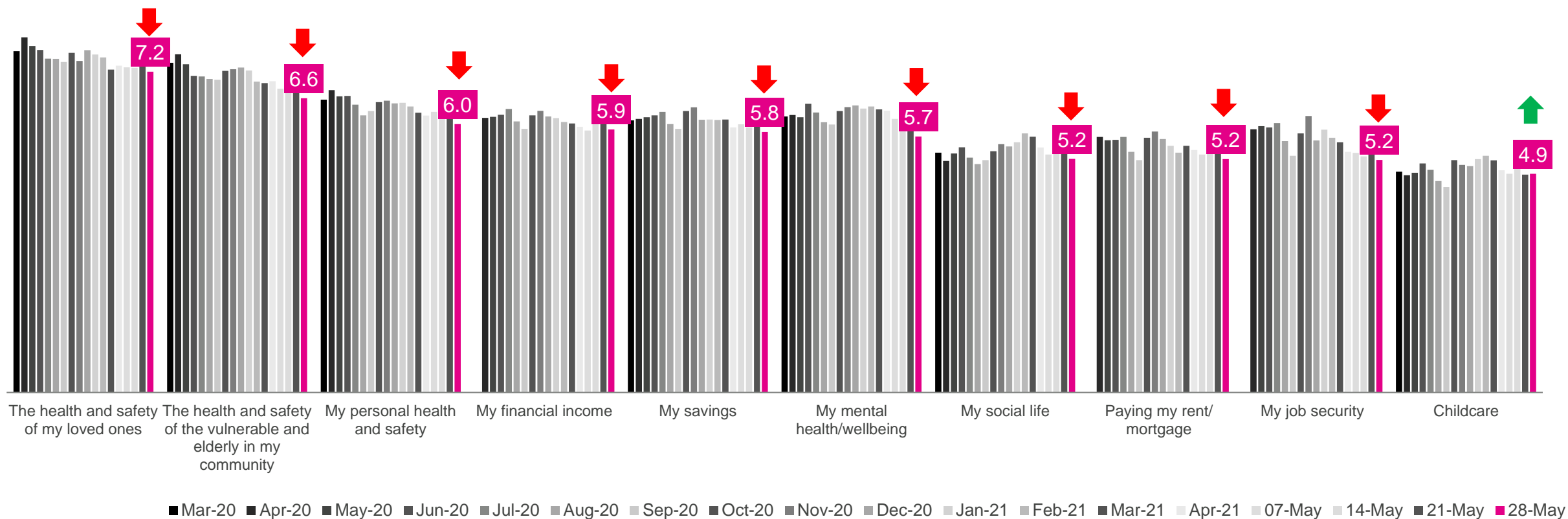


Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500. 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 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, 01/09:250, 23/04: 250, 30/04:250, 07/05:250, 14/05:250, 21/05:250, 28/05:250.



# Concerns for personal health and safety and the health of loved ones has decreased this week, as the vaccine roll outs continue

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)



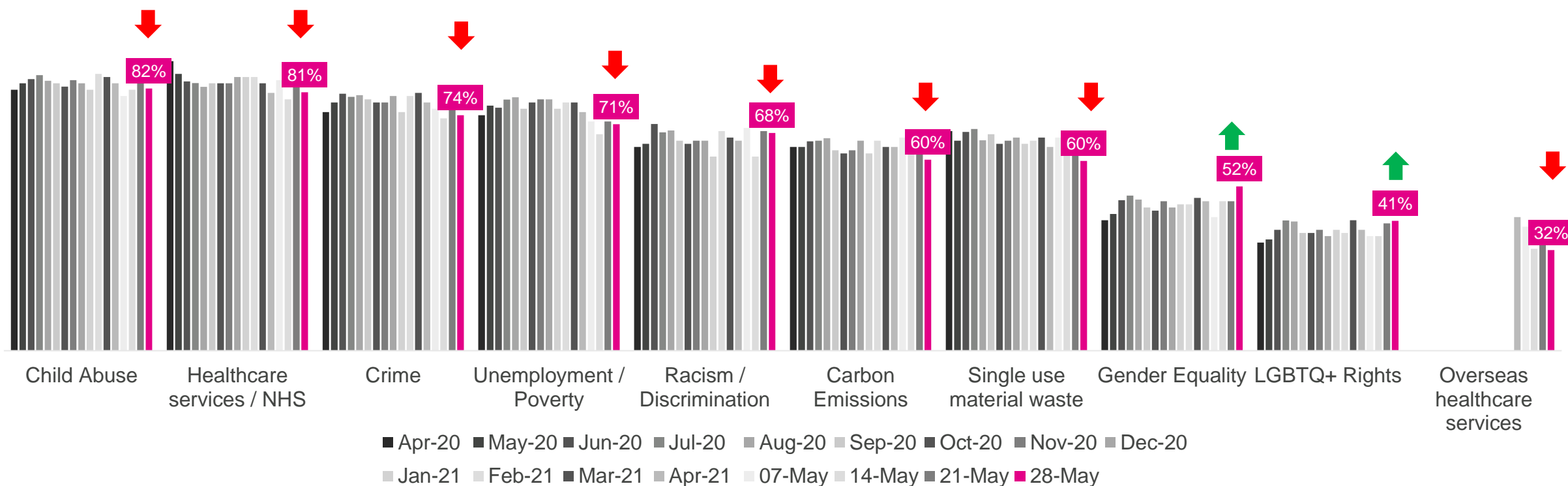
Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500. 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 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 decreased across the board this week, with the exception of gender equality and LGBTQ+ rights

Concerns over gender equality is at it's peak since tracking, now at 52%

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, 28/05:250.



# Changes in Behaviour

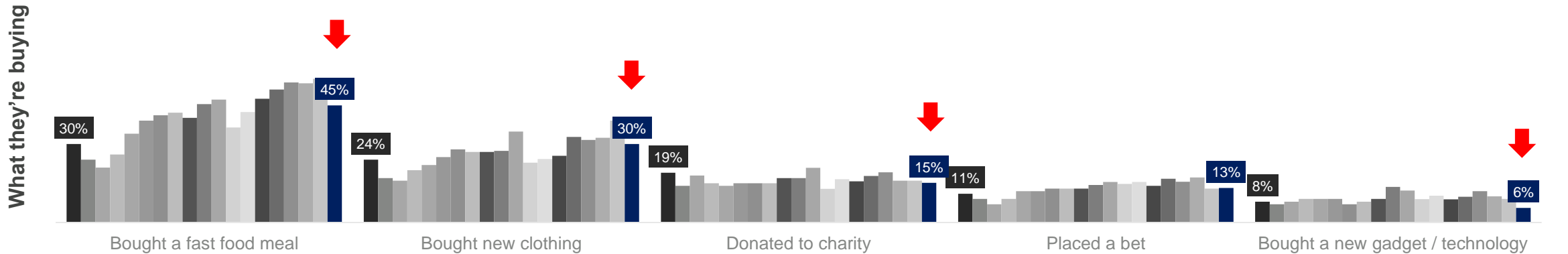
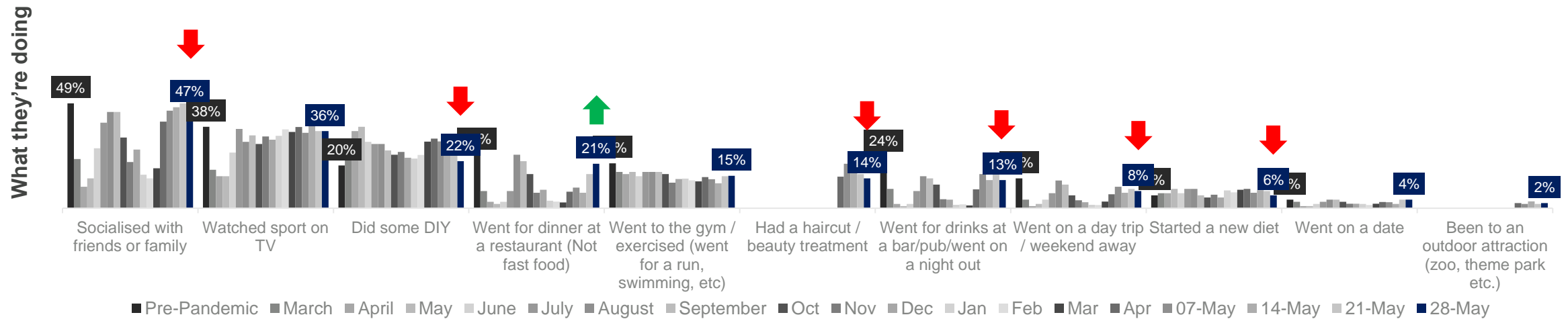




# Fewer people were spending on new clothing, new gadgets/tech or fast food but out of home dining has continued to increase following the reopening of indoor hospitality

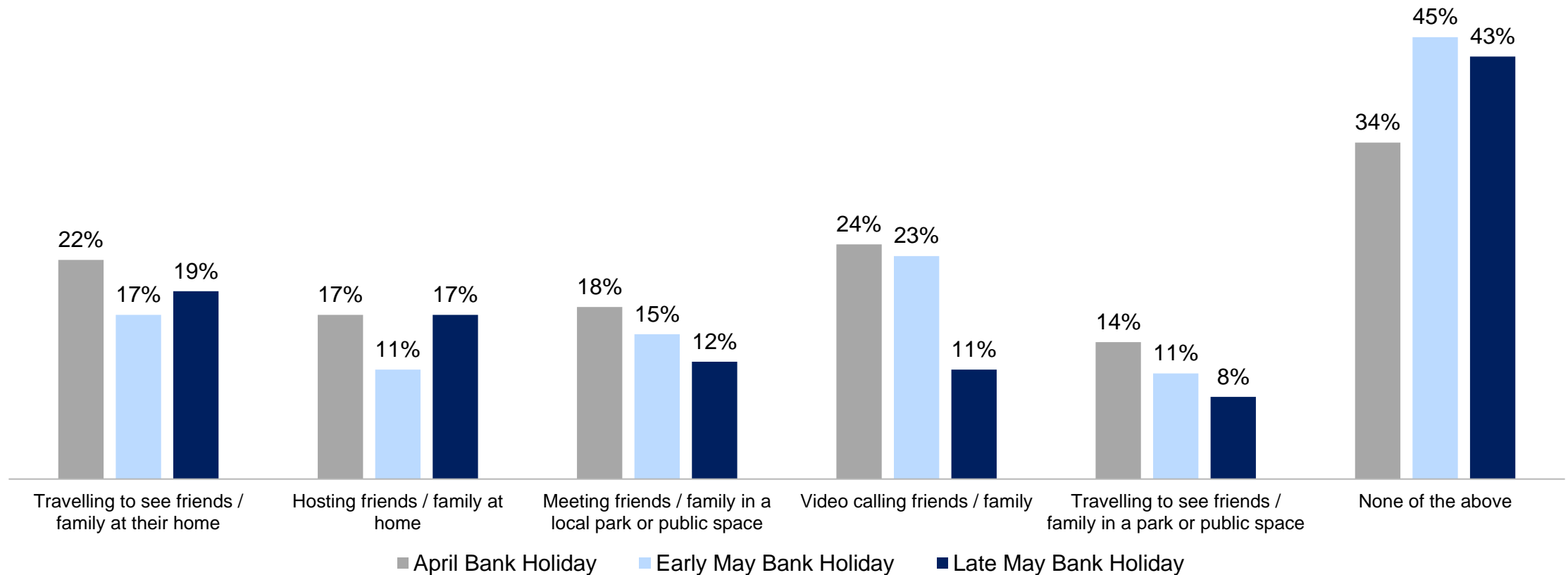
There has been a 10ppt decline in the percentage of people that have done DIY in the last 7 days

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



# There was less reliance on public spaces or remote communication to connect with friends or family over the latest Bank Holiday

Which of the following activities are you planning on doing over the Bank Holiday weekend?

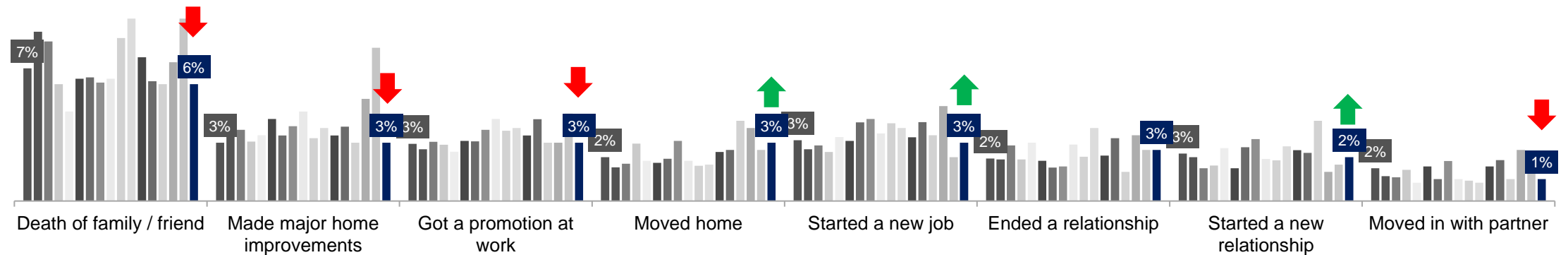




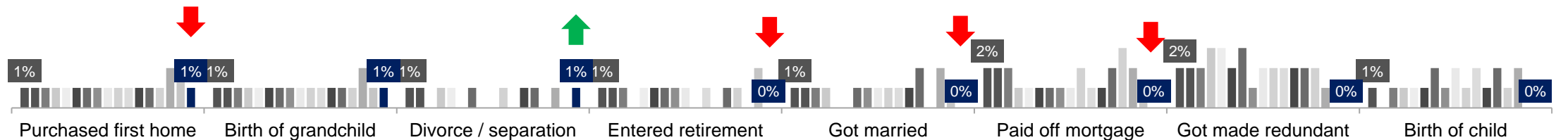
# Major home improvements have dipped, following increased percentages over the previous 2 weeks

There has been a 4ppt drop 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?



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, 28-May



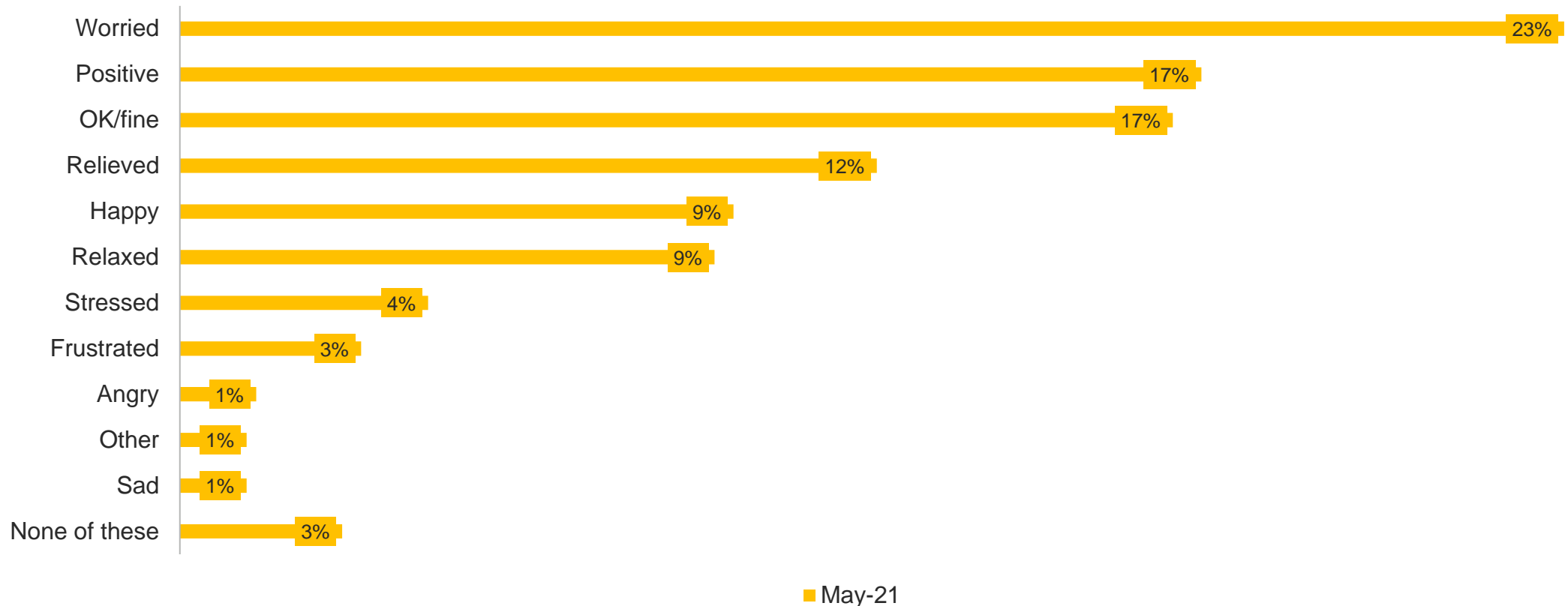




**Looking ahead**

# Worry is the most prominent emotion towards the easing of lockdown restrictions that have taken place in May but a range of positive emotions demonstrate a significant proportion of the population are pleased with this change

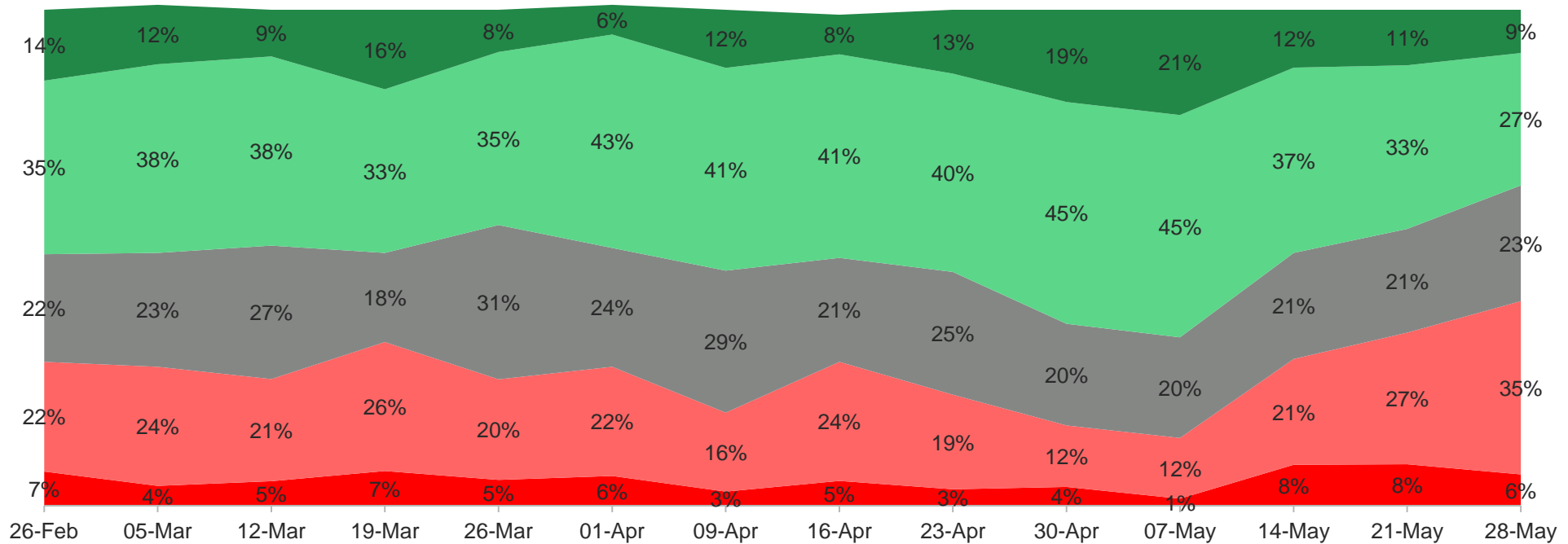
Which of the below emotions best describes how you feel about Step 3 on the road out of lockdown?  
 (Step 3 includes the easing of social restrictions, reopening of indoor hospitality, cinemas, sporting venues and events from 17th May 2021)



# Uncertainty towards the lifting of national lockdown restrictions on 21<sup>st</sup> June continues to grow, amidst ongoing news surrounding the spread of new COVID-19 variants

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

Very Unlikely   Quite Unlikely   Neither Likely nor Unlikely   Quite Likely   Very Likely

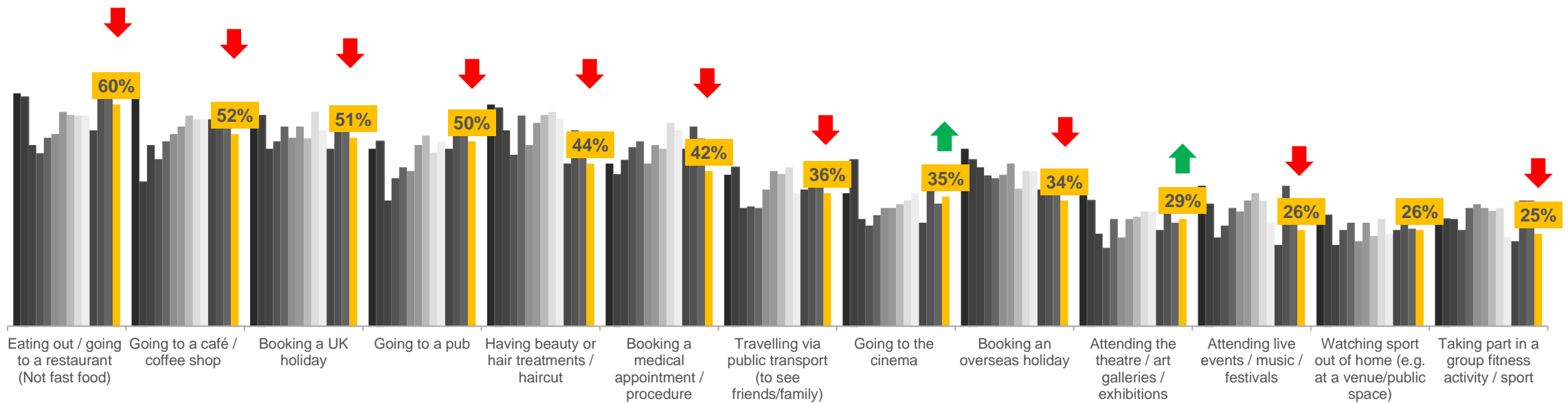


# Interest in out of home activities declined this week, following high levels across the majority of activities for the last 2 weeks

Interest in holidays declined this week, with both domestic (-7ppts) and overseas (-4ppts) holidays experiencing declines in the percentage of people thinking about, researching/browsing or booking them

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 ■ 28-May



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, 23/04:250, 30/04:250, 07/05:250, 14/05:250, 21/05:250, 28/05:250.

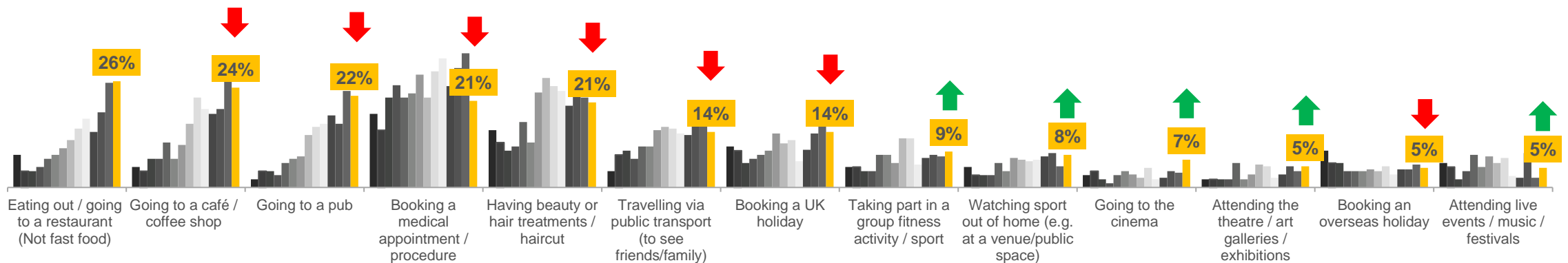


# The number of people booking to out of home activities at venues, such as the cinema, live events, theatre or watching sport out of home, increased this week

1 in 4 people made a booking to eat out/go to a restaurant in the last 7 days, remaining unchanged from last week among declines for other hospitality venues (cafes/coffee shops or pubs)

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 ■ 28-May

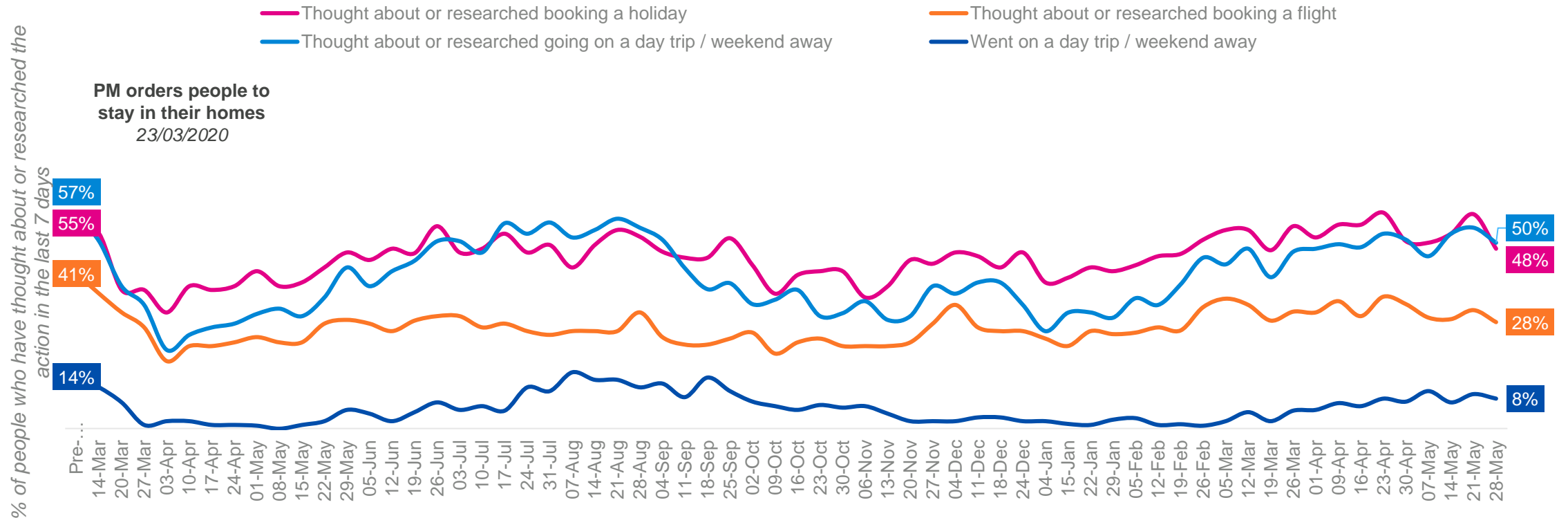




# Interest in holidays, flights and day trips all declined this week

There has been a 9ppt drop in the percentage of people claiming an interest in booking a holiday this week, following a rise above pre-pandemic levels last week

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



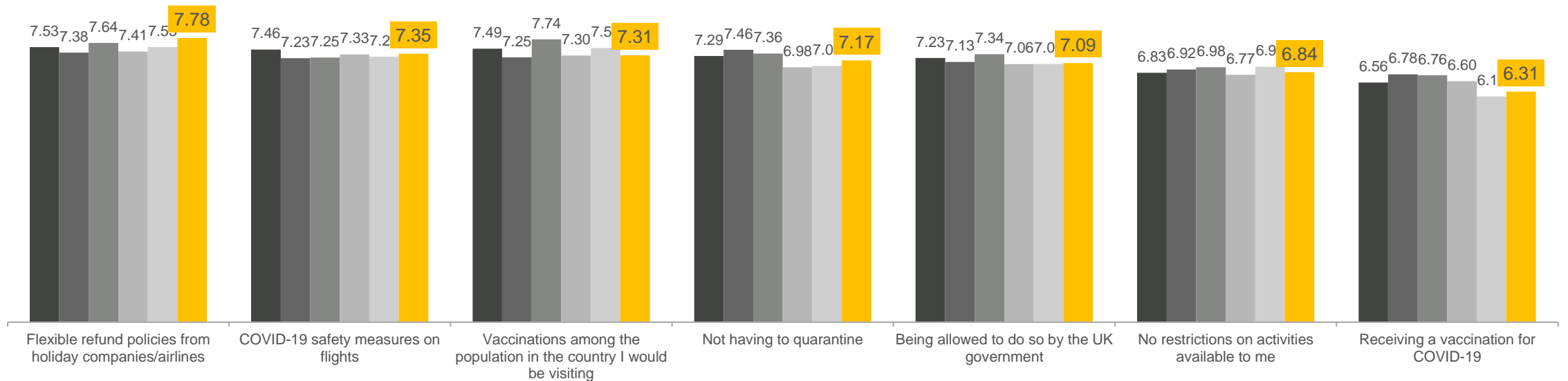


# Flexible refund policies have increased in importance and remain the most important aspect to make travellers feel comfortable in booking an overseas holiday

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 ■ 21-May ■ 28-May



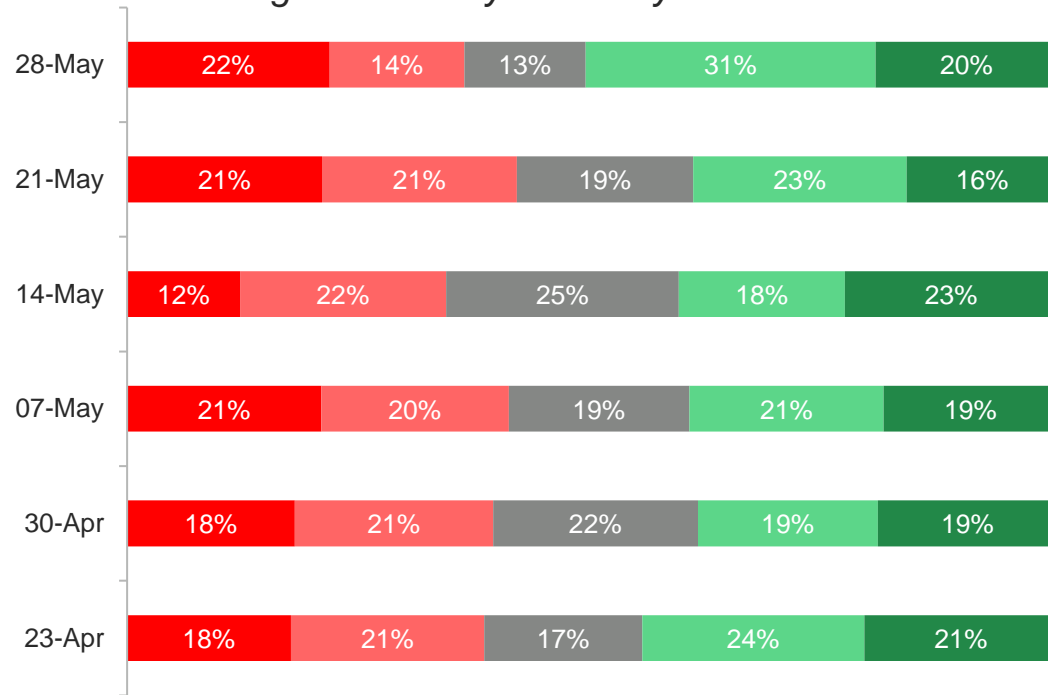
Source: OMD Radar Survey. Those who ever take overseas holidays. 23/04:200, 30/04:200, 07/05:210, 14/05:202, 21/05:197, 28/05:197.



# Travellers are feeling more comfortable with taking long haul flights, particularly long-haul travellers

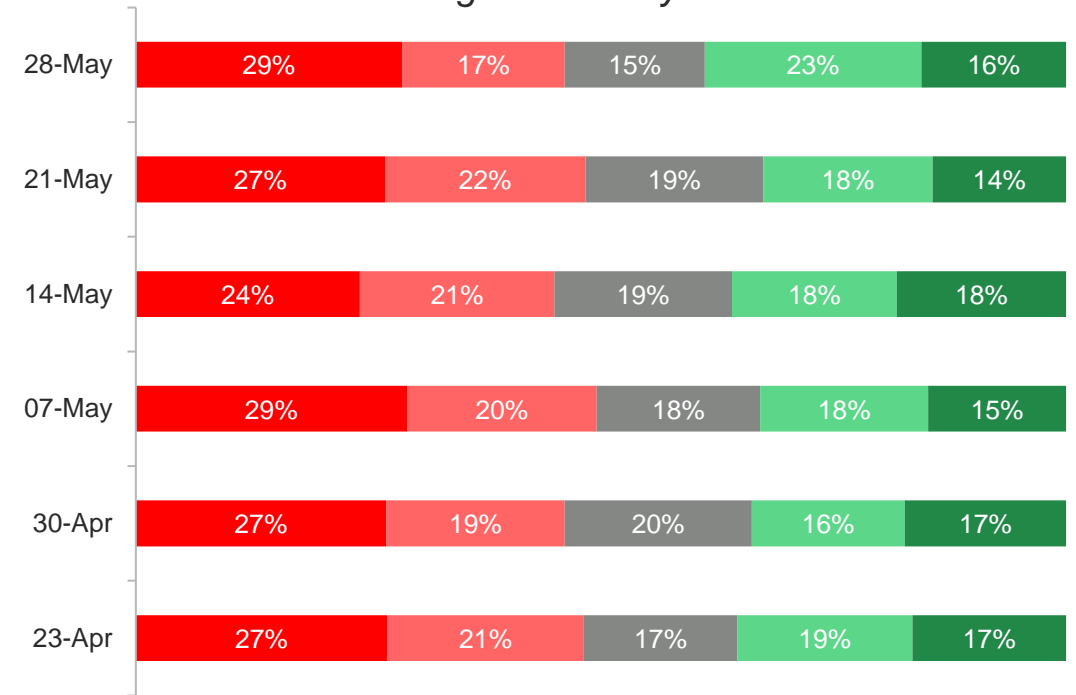
How comfortable would you feel taking a long haul flights (e.g. to Asia, Australia etc.) from 2022 onwards?

*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.

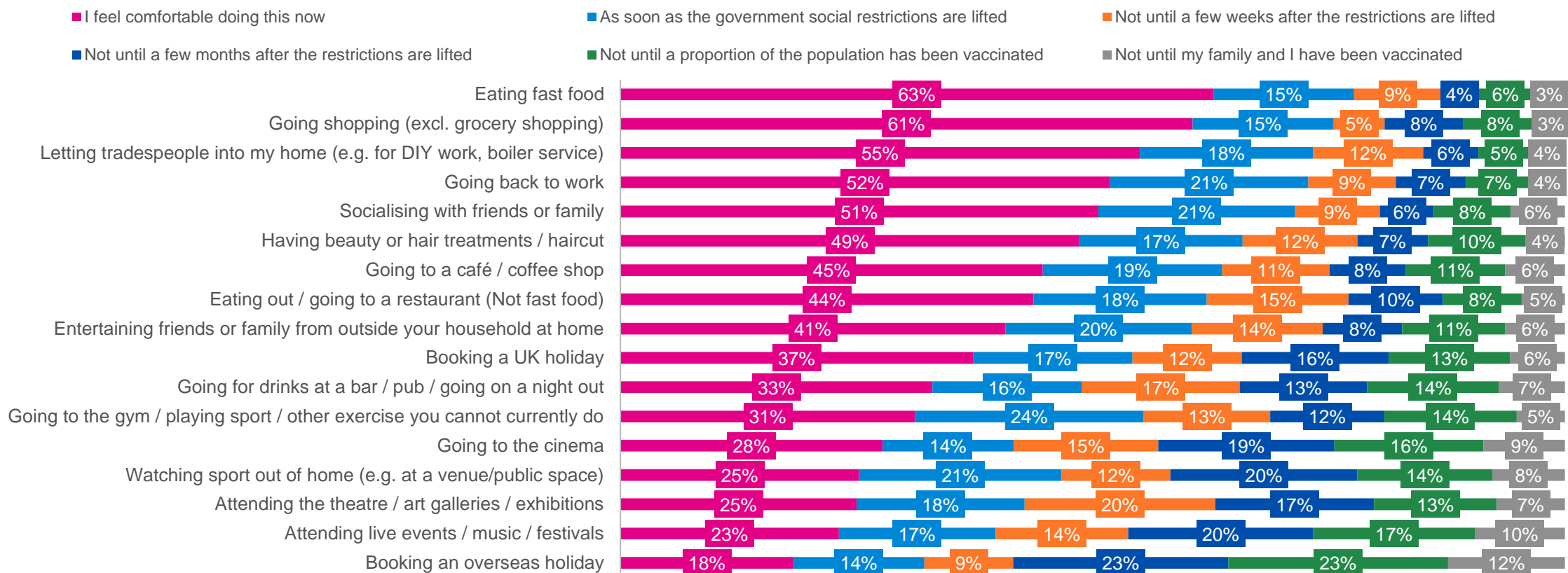
Those who ever take holidays. 23/04: 218, 30/04:219, 07/05:216, 14/05:220, 21/05:209, 28/05:206

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, 28/05:138

# We are seeing continued increases in the percentage of people that feel comfortable socialising with their friends or family and returning to hospitality settings

There has been a 7ppt increase in the percentage of people that feel comfortable socialising with friends or family and similar increases for eating out/going to a restaurant (+4ppt) and going to a café/coffee shop (+2ppt)

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

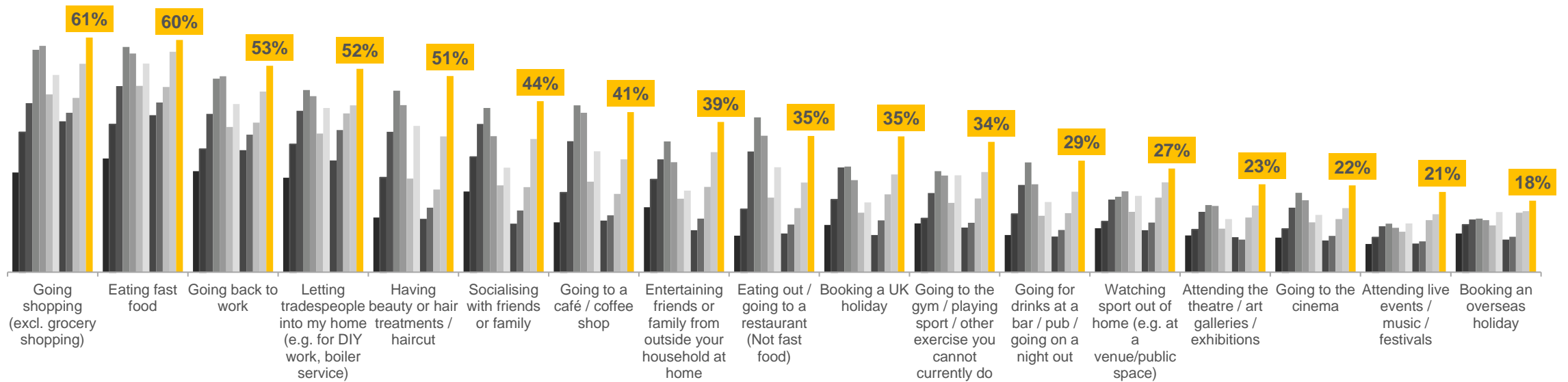




# There have been increasing percentages of people that feel comfortable returning to out of home activities since the decline in January 2021, with considerable increases for social activities and hospitality settings in May

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 ■ May-21



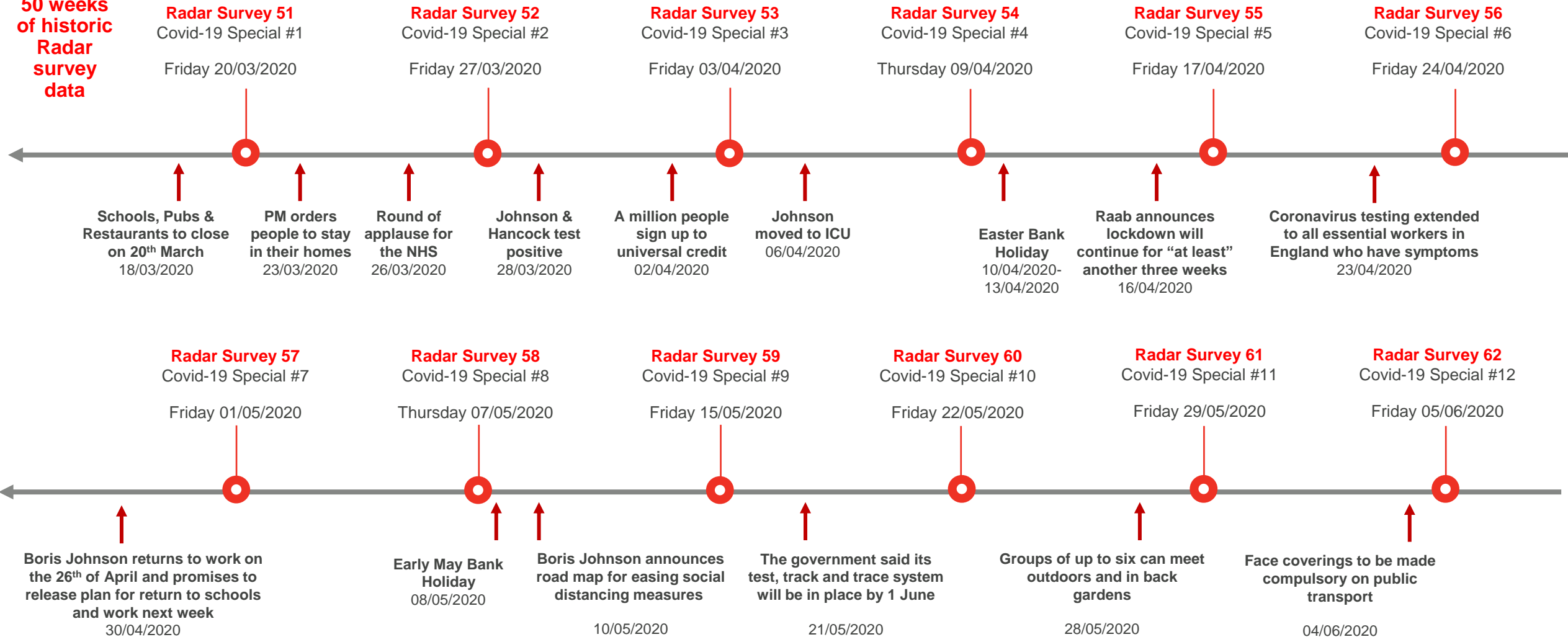
Source: OMD Radar Survey. June 2020 – May 2021. Amongst those who would usually conduct each activity (bases all above 500).

# Appendix



# Survey Timeline

50 weeks  
of historic  
Radar  
survey  
data

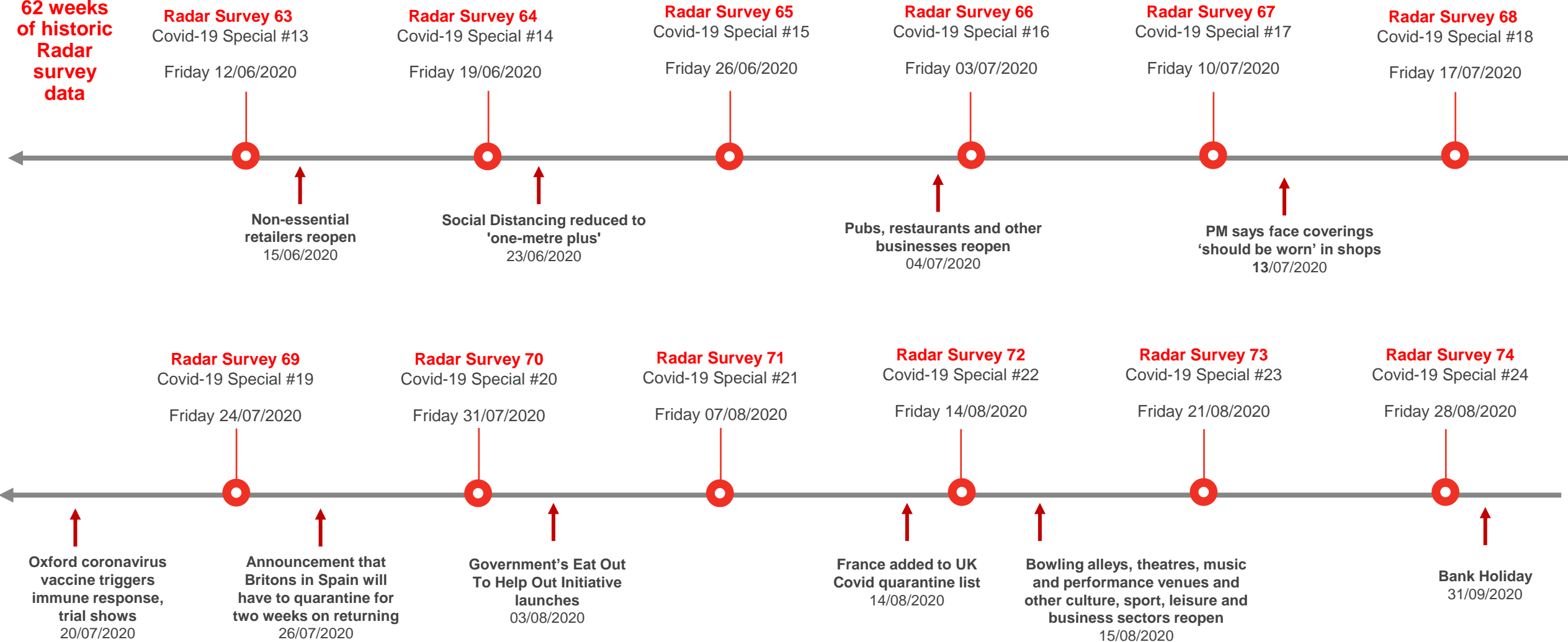






# Survey Timeline

62 weeks  
of historic  
Radar  
survey  
data





# 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 8<sup>th</sup> 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 15<sup>th</sup> Feb 2021**  
05/02/2021

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

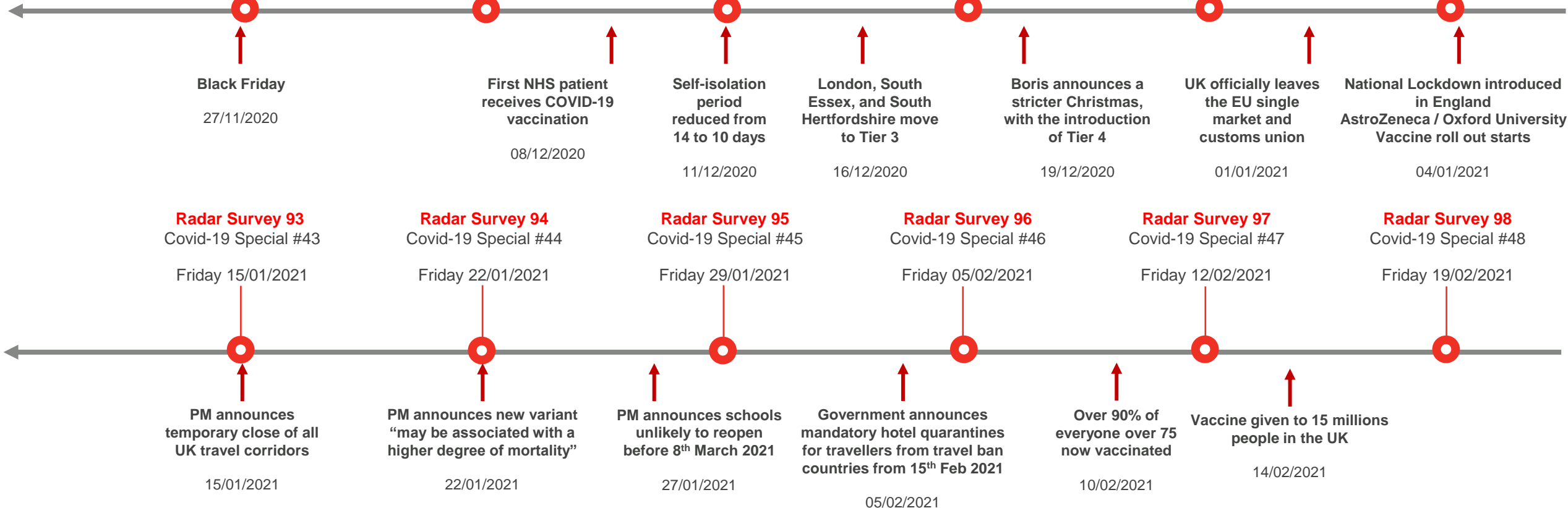


**Over 90% of  
everyone over 75  
now vaccinated**  
10/02/2021

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



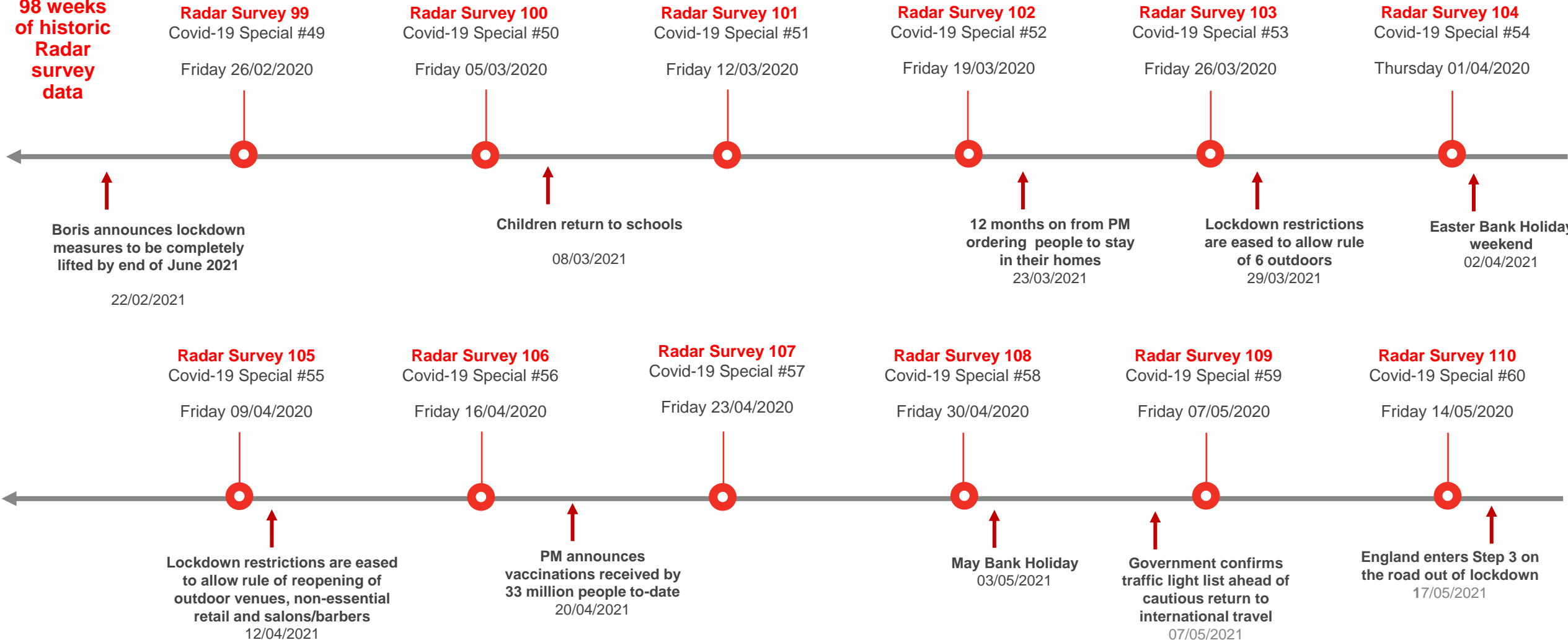
**Vaccine given to 15 millions  
people in the UK**  
14/02/2021





# Survey Timeline

98 weeks  
of historic  
Radar  
survey  
data





# Survey Timeline

**111 weeks  
of historic  
Radar  
survey  
data**

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

**Radar Survey 112**  
Covid-19 Special #62  
Friday 28/05/2021

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

21/0252021

**May Bank Holiday**  
31/05/2021

