

COVID-19 Consumer Impact Report
w/c 14.06.21

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 114 weeks, surveyed over 32,000 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 11th June to Sunday 13th June 2021 – ahead of the government announcement on the delayed lifting of lockdown restrictions.

Summary: The mood of the nation slumped this week, with happiness dropping, anxiety rising, and heightened concerns around personal finances

- 01** **Happiness and life satisfaction levels have declined** again this week, with **anxiety levels heightened**. **Consumer confidence is also low, with financial security and optimism around future financial conditions having decreased** in the last 7 days
 - 02** Despite the stamp duty holiday drawing near (June 30) **plans to buy or build a home has peaked this week**, with **15%** stating they are planning on doing so in the next 6 months.
 - 03** **Home moving and improving increased this week**, with a 2ppt increase in the percentage of people making major home improvements, a 3ppt increase for moving home and a 2ppt increase in first home buying
 - 04** Amidst the commencement of Euro 2020, **positive momentum has continued in the return to hospitality venues and entertainment venues**, with a 6ppt increase in the percentage of people going for drinks at a bar / pub / for a night out
 - 05** Pessimism was prominent ahead of the announcement on the delayed lifting of lockdown restrictions, **less than ¼ of those in England believed that restrictions would be lifted as planned**
 - 06** **1 in 4 people claim to feel comfortable booking an overseas holiday**, the highest level in the past 12 months following a 7ppt uplift this week. Plus, 7% of people stated they had booked an overseas holiday this week.
-

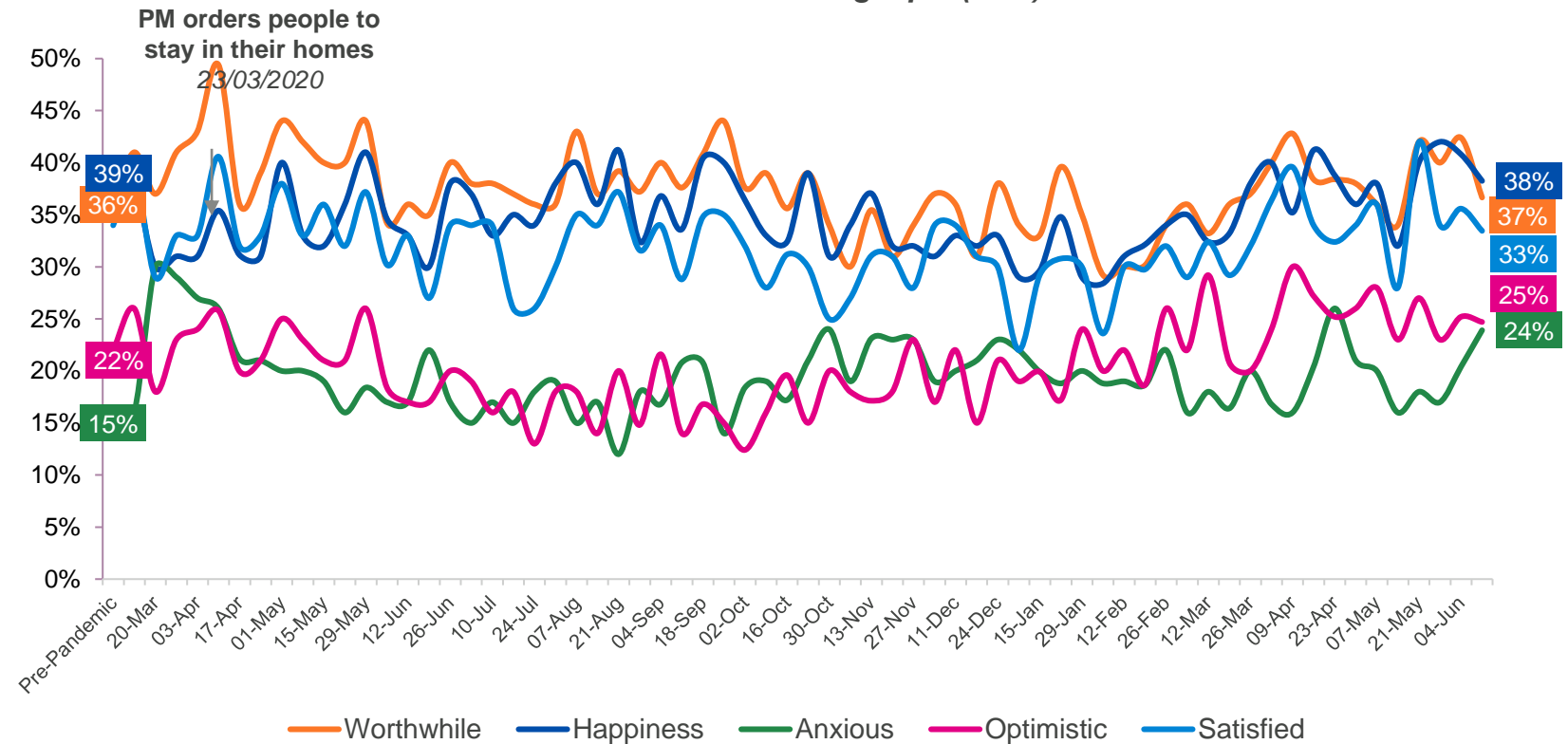


**Life satisfaction,
optimism & consumer
confidence**



Happiness levels and life satisfaction have declined again this week, and anxiety levels have increased

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



- ↓ **Happiness levels have continued to decline this week, down 3ppts, now at 38%**
- = **Optimism has remained the same at 25%.**
- ↓ **Life satisfaction has decreased 3 ppts from 36% to 33%**
- ↑ **Anxiety levels have continued to increase this week, from 20% to 24%**



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)



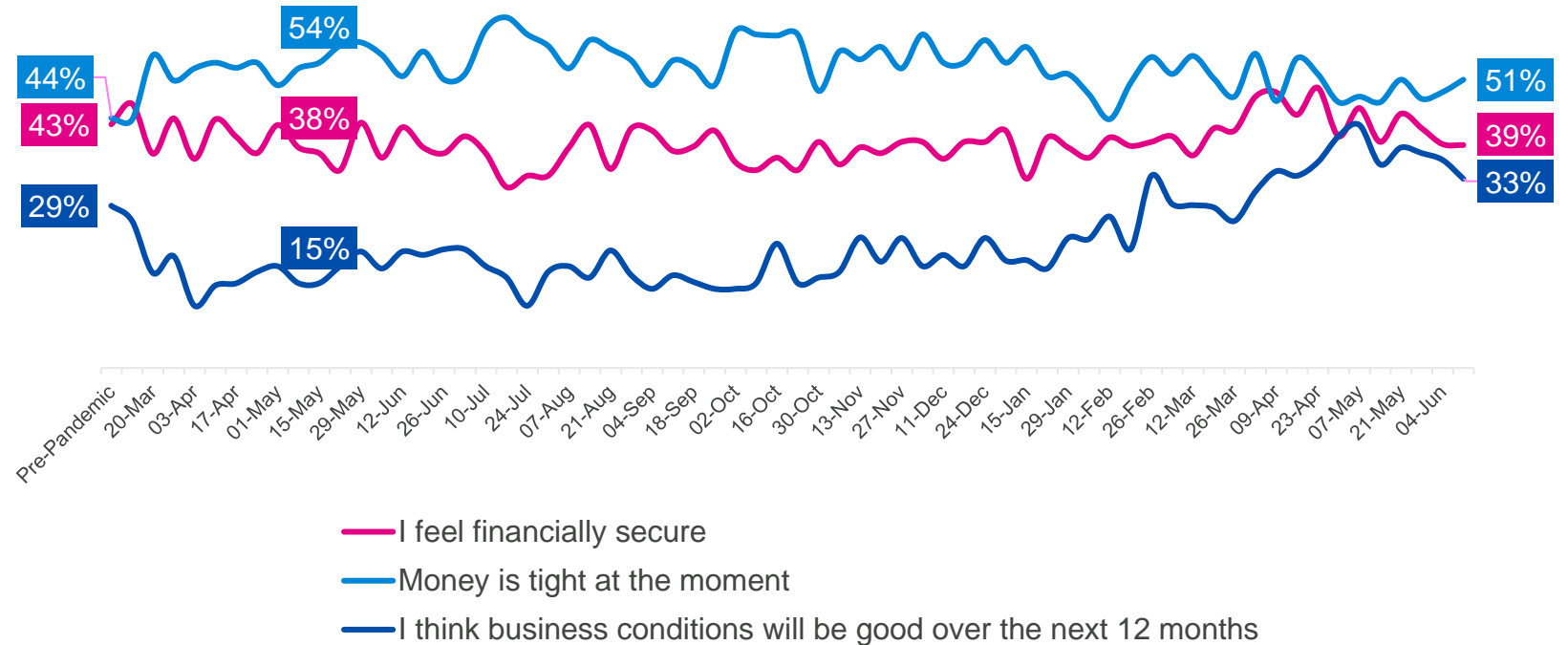
There has been a 1ppt decrease in the percentage of people feeling financially secure, falling from 40% to 39% this week



The percentage of people stating that money is tight at the moment increased again this week, from 49% to 51%

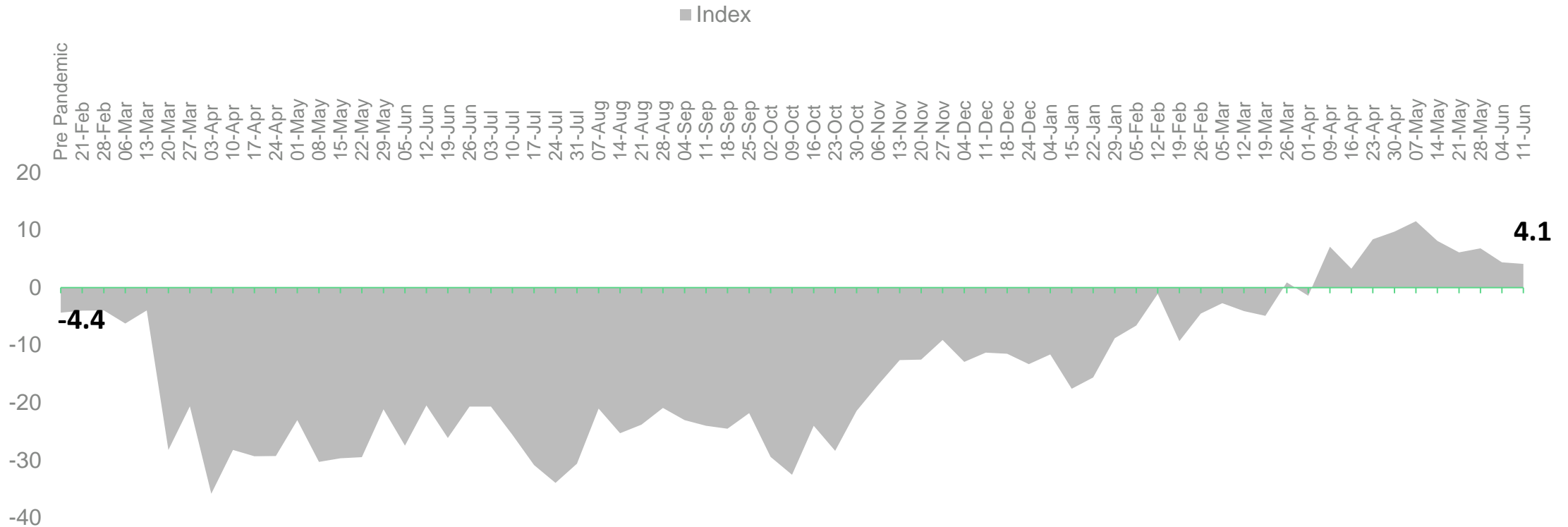


Confidence in future business conditions has decreased 4ppts this week from 37% to 33%





Consumer confidence has declined this week, moving from 4.4 to 4.1



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.



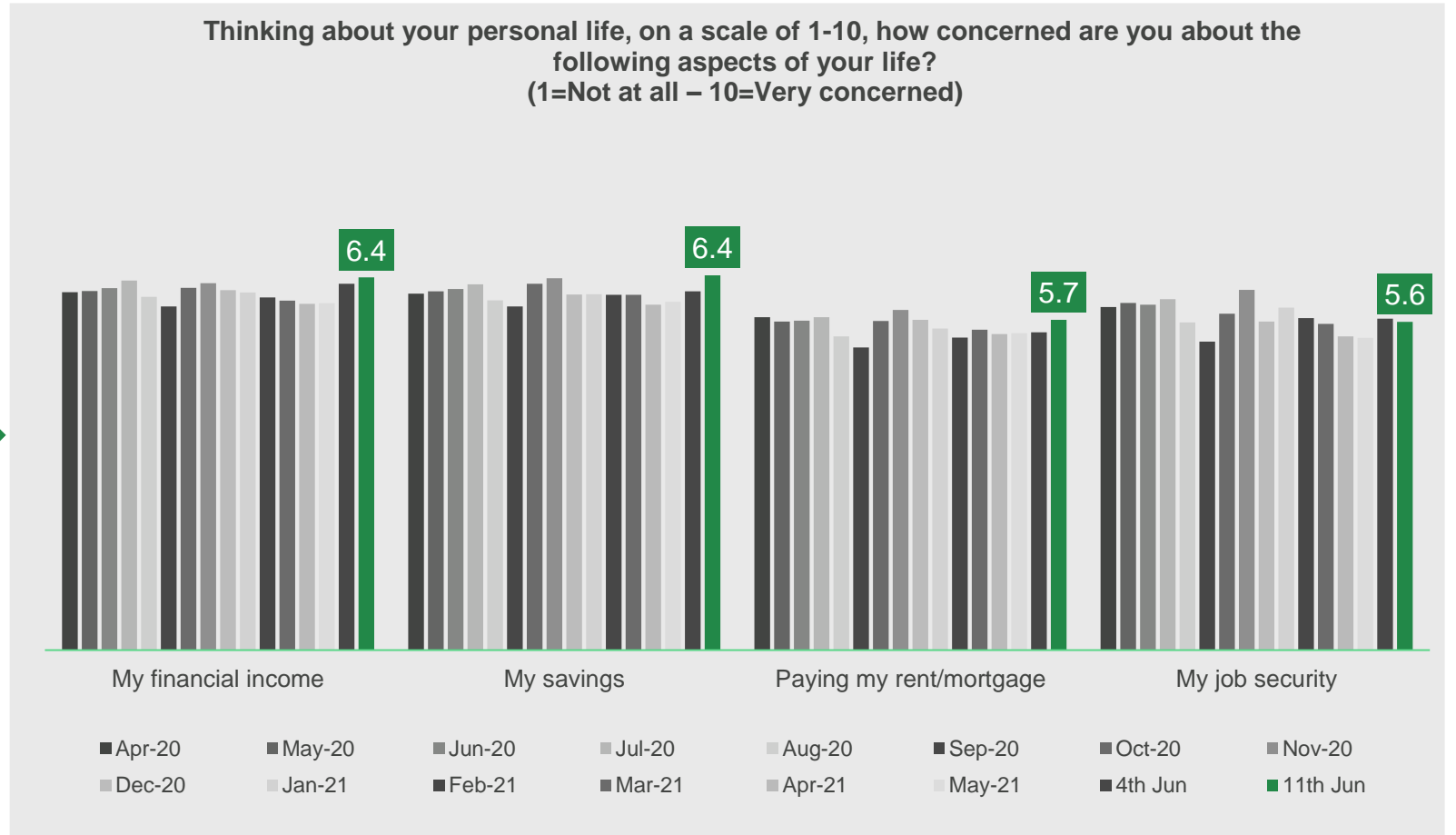
Concerns over personal finances continue to rise this week, with worries over financial income, savings and paying rent being the highest this year

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

6% 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

70% say that their employer has been **supportive** during the COVID-19 outbreak

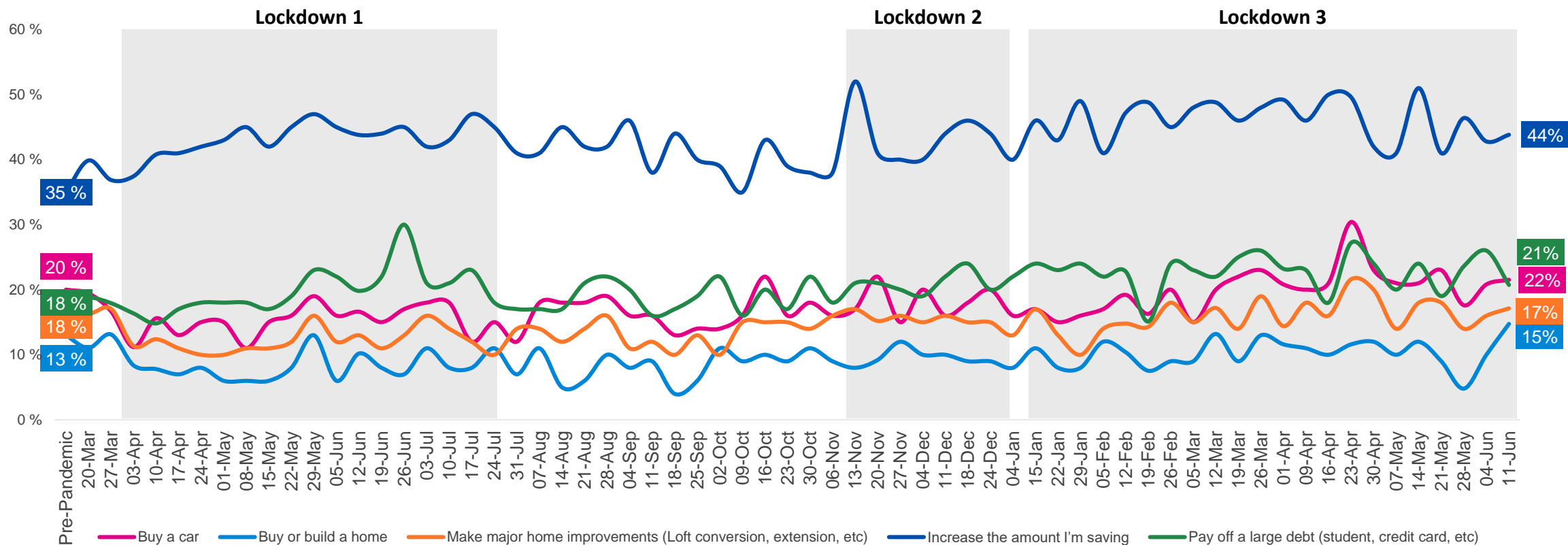




Plans to buy or build a home and make major home improvements have increased this week

The percentage of people that plan to buy or build a home has increased by 5ppts again this week, as stamp duty holiday is due to end June 30th.

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, 27/11:250, 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, 28/05:250, 4/06:250, 11/06:251.

Confidence in Government & Broad Concerns



Confidence in the government has increased marginally by 1ppt this week, but many still criticise government decision making

Concerns around “freedom day” have further harmed perception of the Government’s response

Some feared that the Government would delay easing restrictions:

“I don’t feel very confident due to the amount of lockdowns we have had in the past and the uncertainty of the future with the possibility of not easing all restrictions on the 21st of June.”

“I think it is a very bad move to halt restrictions on 21st June.”

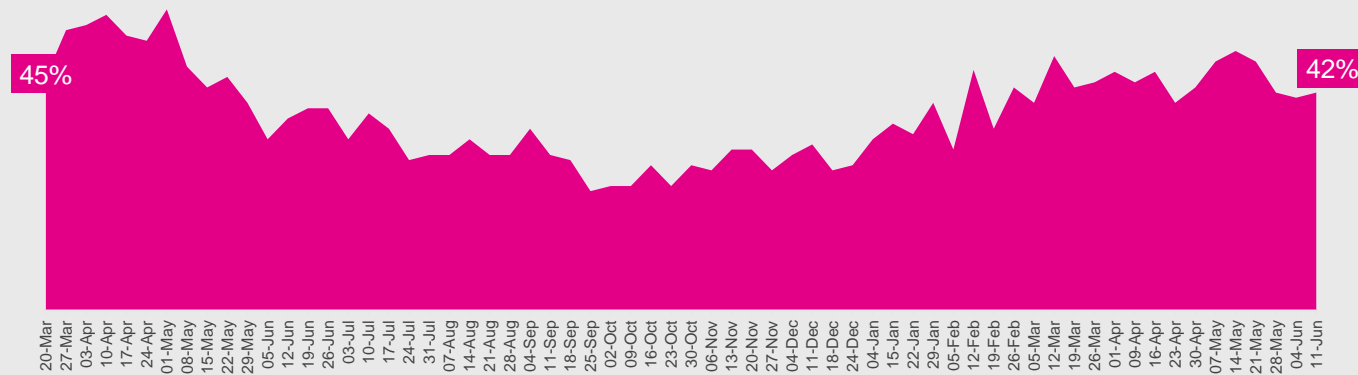
Others felt as though the government have not acted quick enough in the past, and are concerned over the planned easing of restrictions:

“They need to keep the restrictions on after the 21st of June as the covid cases are rising again”

“I think they should not of opened things up just yet, now the virus spreading again. They should have waited longer.”

“I think that they have Been slow to react Underestimated massively the human cost Treated the NHS with derision Lied and inveigled at every turn.”

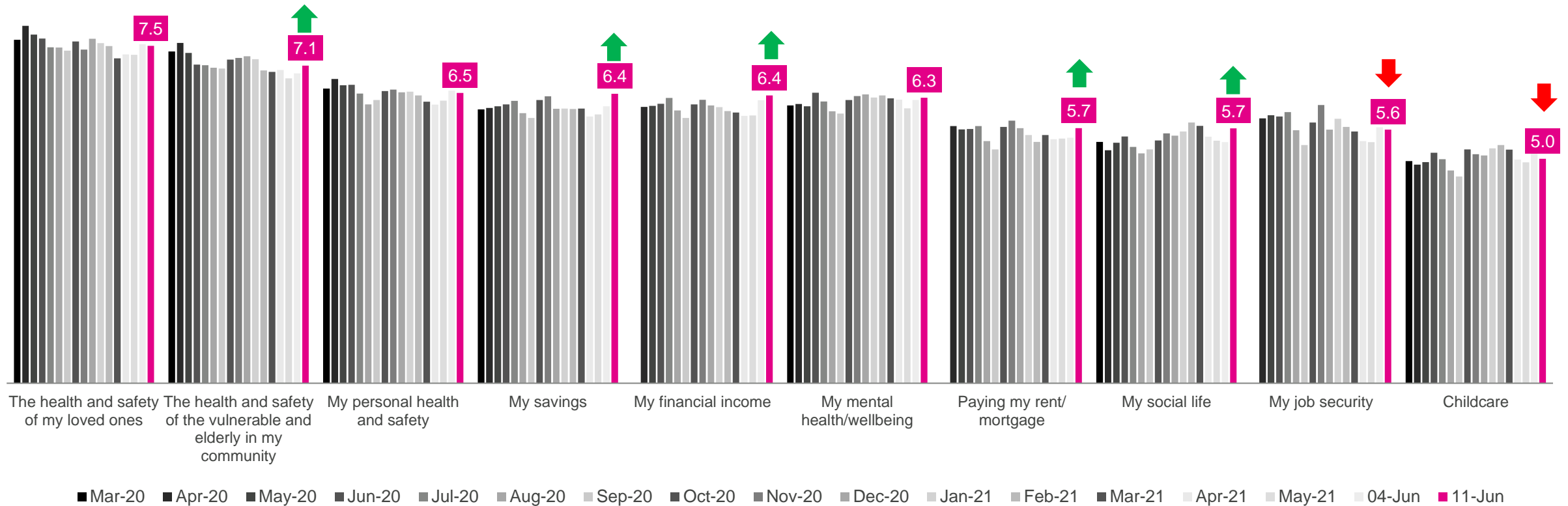
How confident are you in the government’s response to the COVID-19 outbreak? (% Confident)





There were greater levels of concern over financial issues this week, with marginal increases for personal savings, income and paying rent/mortgage

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



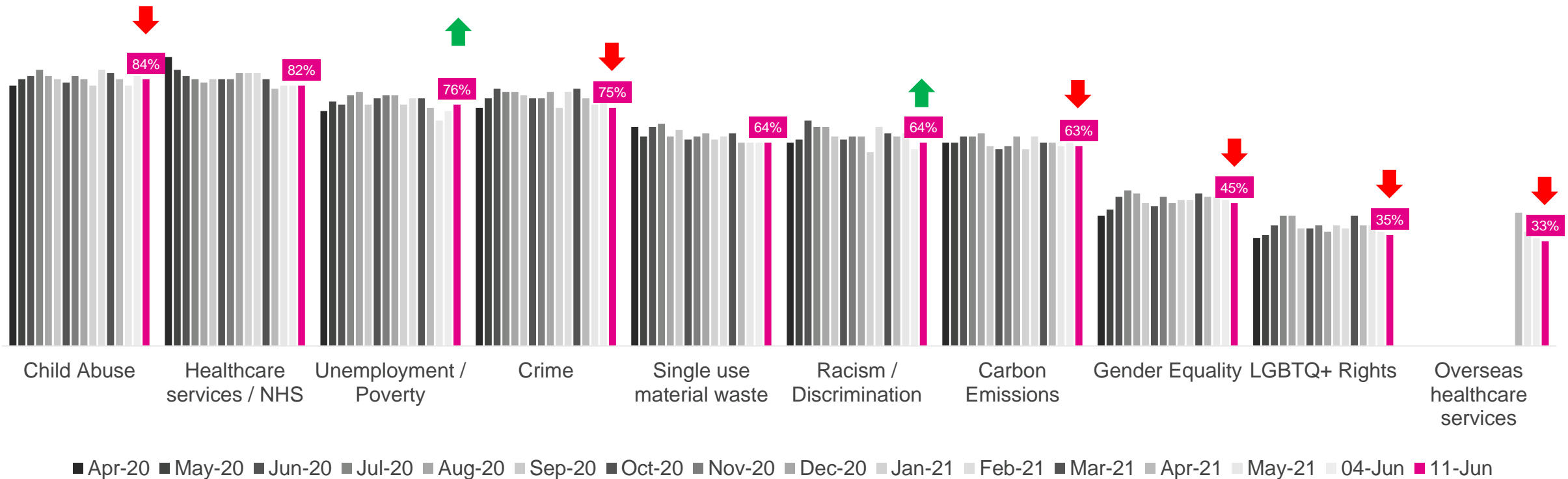
Source: OMD Radar Survey. Pre-Pandemic:12,076, 13/03:246, 20/03:488, 27/03:480, 03/04:503, 10/04:501, 17/04:501, 24/04:500, 01/05:500, 08/05:500, 15/05:500, 22/05:500, 29/05:500, 05/06:500, 12/06:500. 19/06:500, 26/06:500, 03/07:500, 10/07:500, 17/07:250, 24/07:250, 31/07:250, 07/08:250, 14/08:250, 21/08:250, 28/08:250, 04/09:250, 11/09:250, 18/09:250, 25/09:250, 02/10:250, 09/10:250, 16/10:250, 23/10:254, 30/10:250, 06/11:250, 13/11:251, 20/11:250, 27/11:265, 4/12:250, 11/12:250, 18/12:250, 24/12:250, 04/01:250, 15/01:236, 22/01:250, 29/01:250, 05/02:250, 12/02:250, 19/02:252, 26/02:250, 05/03:250, 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. 04/06:250, 11/06:251



Concerns have remained relatively consistent this week

In the second week of Pride, concern over LGBTQ+ rights has declined for the second consecutive week, dropping by 1ppt this week

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, 04/06:250, 11/06:251



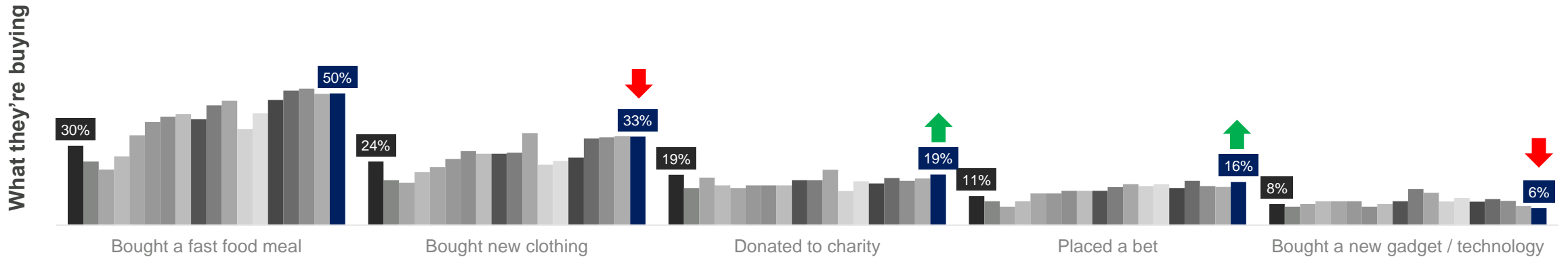
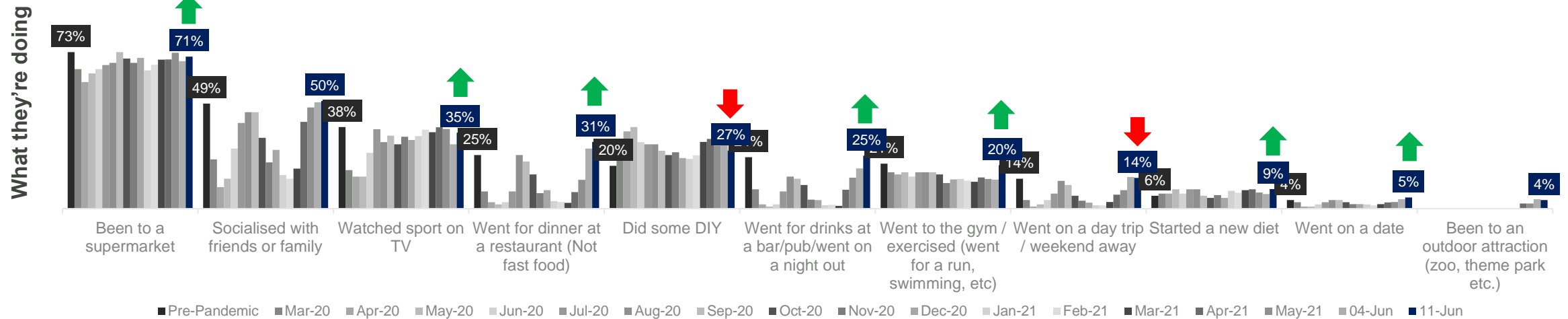
Changes in Behaviour



The use of hospitality venues continues to rise, with more people heading out to pubs and restaurants

There has been a 6ppt increase in the percentage of people going for drinks at a bar / pub / for a night out and a 3ppt increase in the percentage of people going for dinner at a restaurant

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

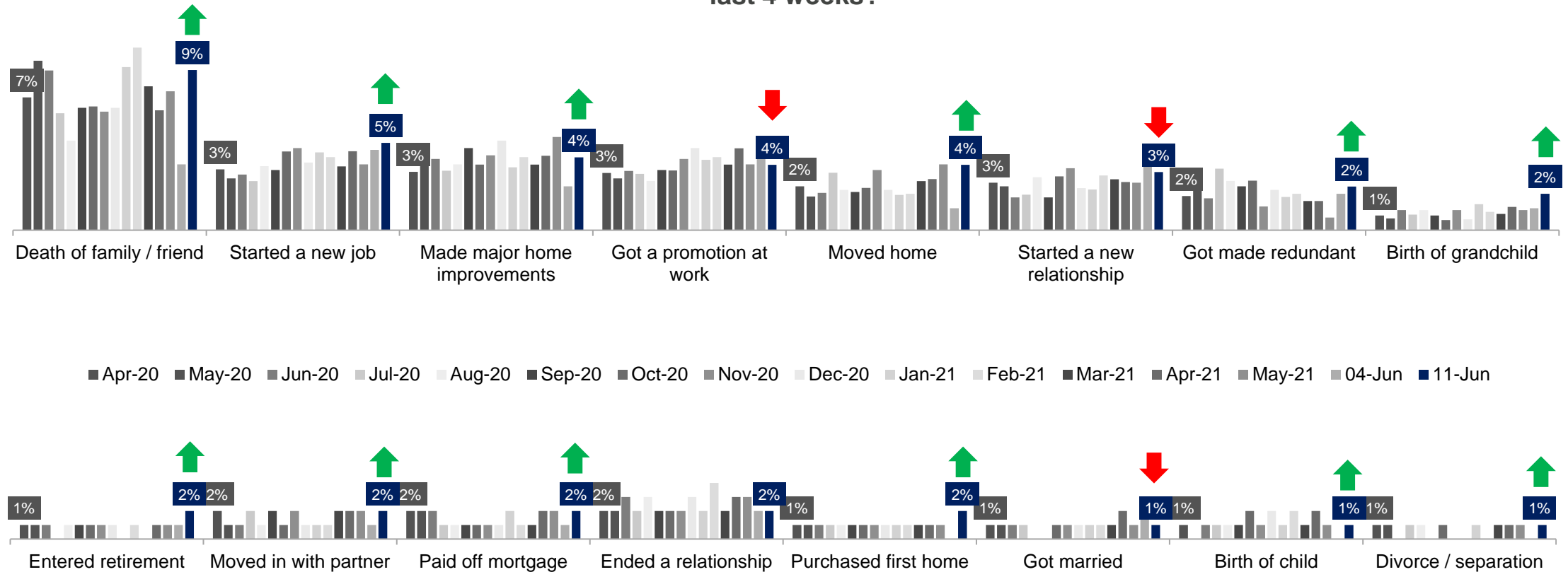


Source: OMD Radar Survey. Pre-Pandemic:12,076, Mar-20:1214, Apr-20:2002, May-20:2500, Jun-20:2001, Jul-20:1750, Aug-20:1000, Sep-20:1000, Oct-20:1254, Nov-20:1001, Dec-20:1000, Jan-21:986, Feb-21:1001, Mar-21:1003, Apr-21:1250, May-21:1000, 04-Jun:250, 11-Jun:251

After a brief decline last week, the percentage of people that have recently experienced the death of a loved one has sadly increased

Home moving and improving increased this week, with a 2ppt increase in the percentage of people making major home improvements, a 3ppt increase for moving home and a 2ppt increase in first home buying

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

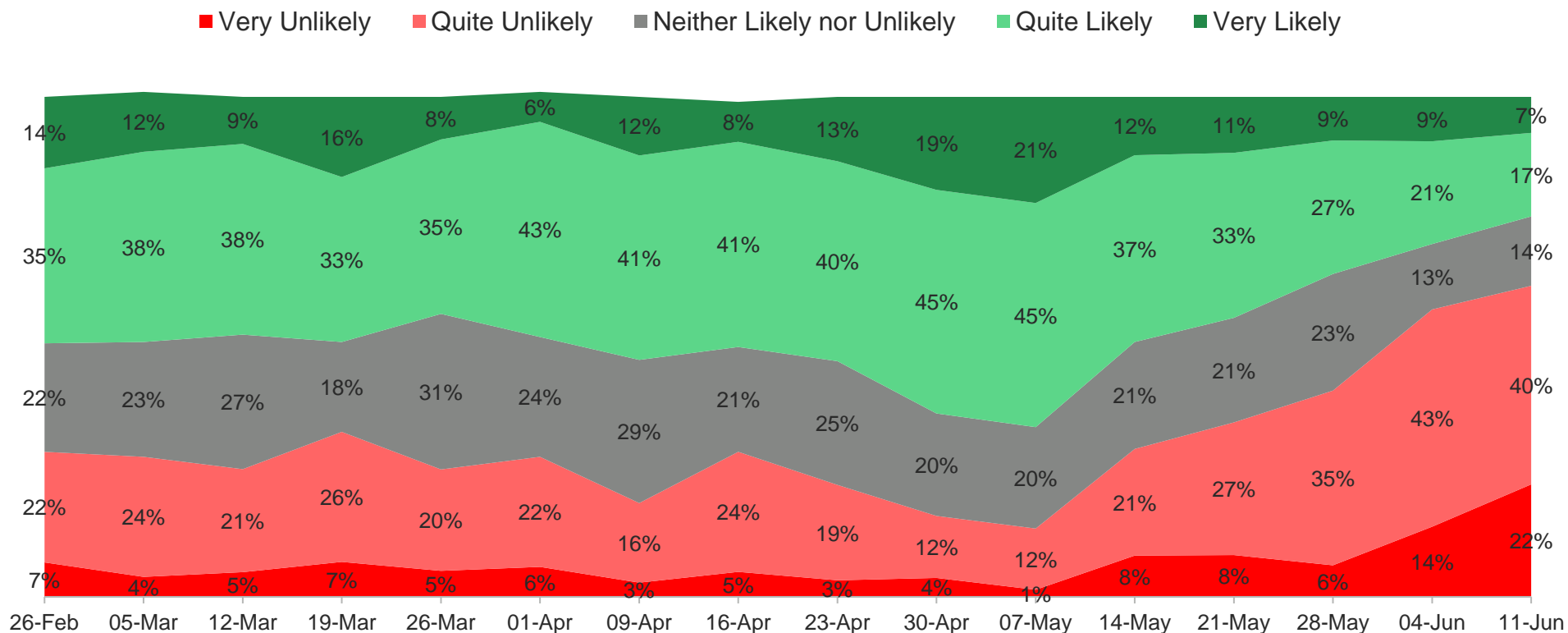




Looking ahead

Ahead of the announcement on the delayed lifting of lockdown restrictions, less than ¼ of those in England believed that restrictions would be lifted as planned

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

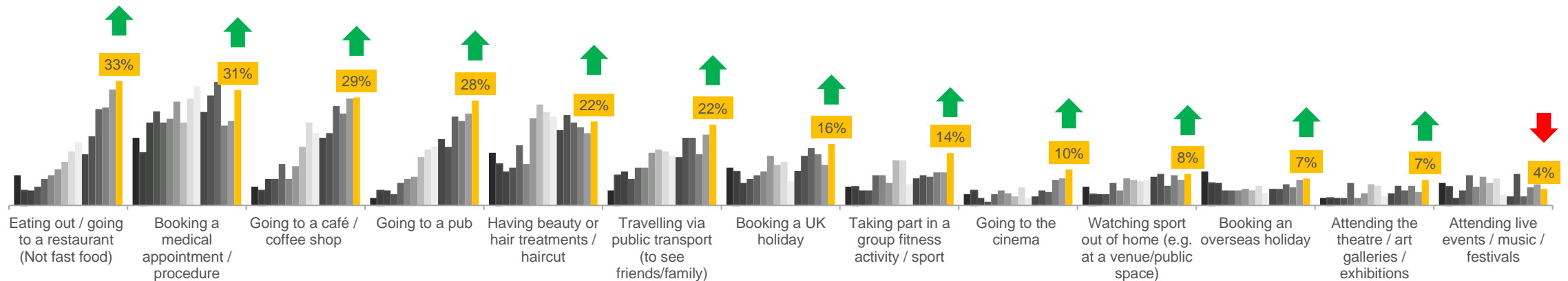


Positive momentum has continued in the return to hospitality venues and entertainment venues as well as uplift for the travel sector

There has been a 5ppt increase in the percentage of people booking a UK holiday, after a 3ppt dip last week, and 3ppts more people booked public transport to see friends/family

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 ■ 04-Jun ■ 11-Jun



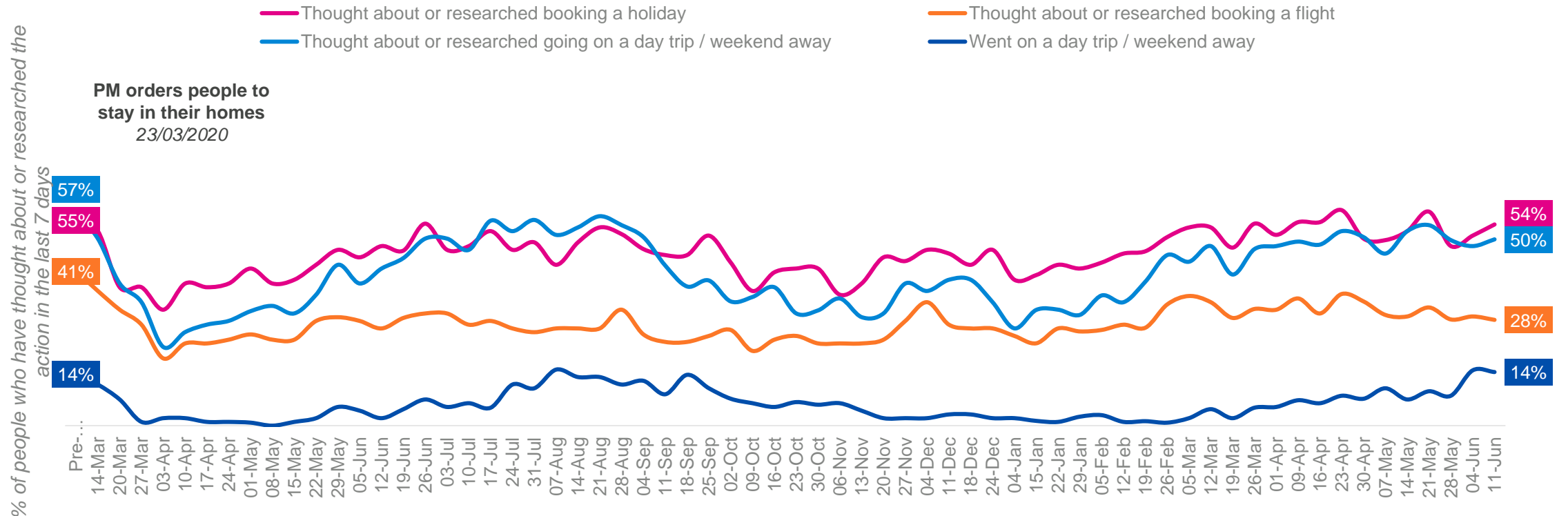
Source: OMD Radar Survey. 26/02:250, 05/03: 251, 12/03: 250, 19/03: 250, 26/03: 250, 01/04:250, 09/04:250, 16/04: 250, 23/04:250, 30/04:250, 07/05:250, 14/05:250, 21/05:250, 28/05:250, 04/06:250, 11/06:251.



Interest in holidays recovered after a drop at the end of May

Interest in booking a holiday increased by 3ppts for the second consecutive week and interest in going on a day trip / weekend away increased by 2ppts

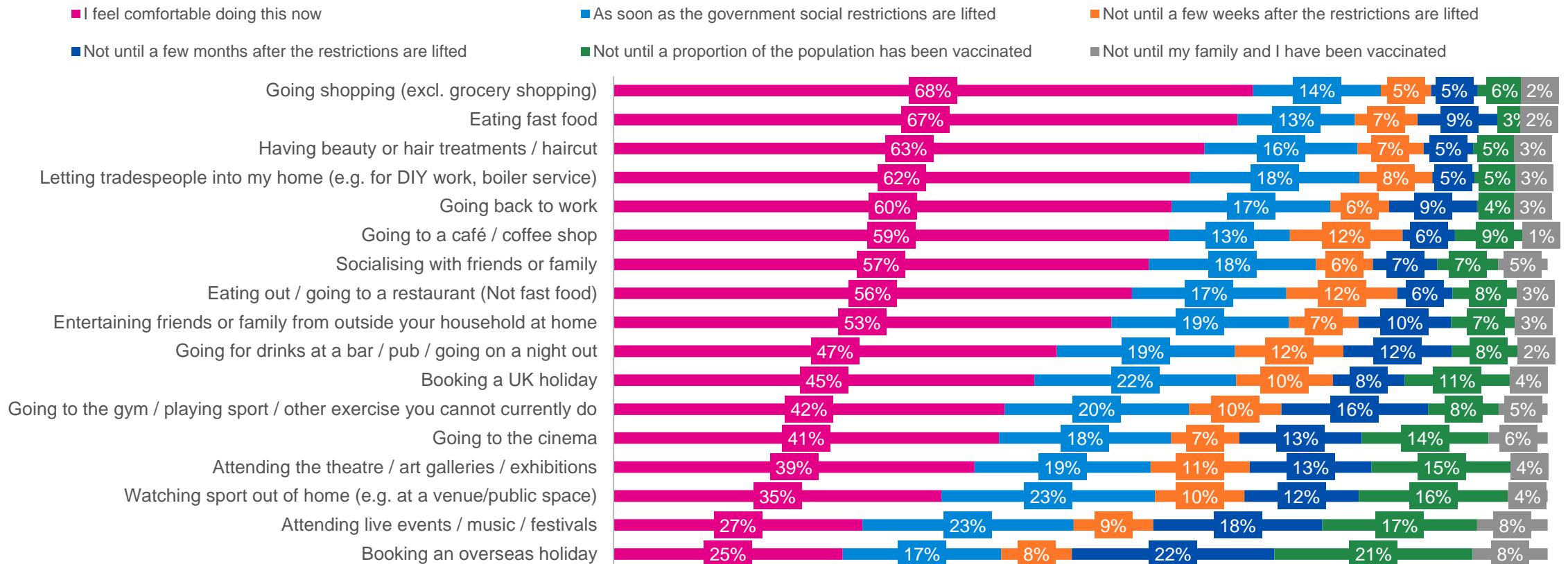
Looking at the different activities listed below, in the past 7 days which have you thought about and or researched if at all?
Which of the below, if any, have you done or have happened to you in the last 7 days? – Went on a day trip





1 in 4 people claim to feel comfortable booking an overseas holiday, the highest level in the past 12 months following a 7ppt uplift this week

When would you feel comfortable doing the following again?

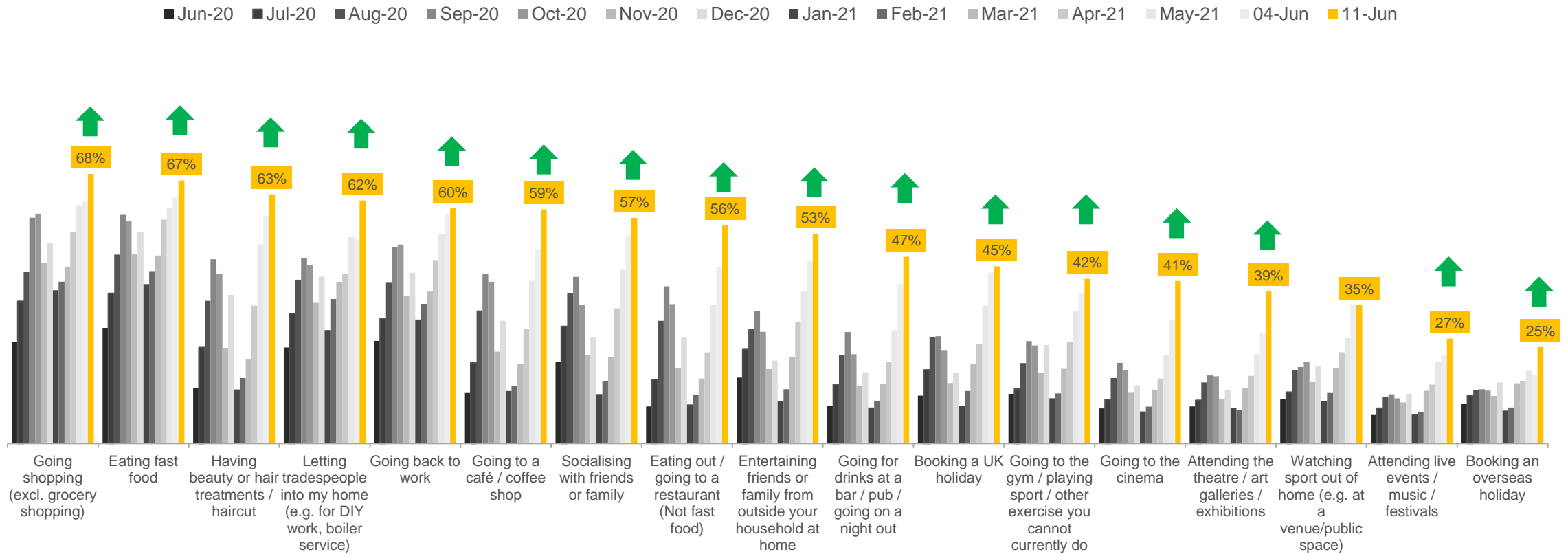




There have been considerable increases in the percentage of people who feel comfortable returning to out of home activities, particularly cinemas, restaurants and the arts

There has been a 10ppt increase in the percentage of people who feel comfortable going to the cinema and 11ppt uplifts for theatres / art galleries / exhibitions and eating out / going to restaurants

And at what stage would you feel comfortable doing the following?
I feel comfortable doing this now



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



Many people were looking forward to overseas travel this week and others just want the freedom to go out for social occasions without a booking or a face mask

What are you most looking forward to doing once all lockdown restrictions have been lifted?

Holidays are prominent in the minds of many this week when considering what they are looking forward to post-lockdown but the frequency of policy changes that have been made to-date has created uncertainty

“Travelling abroad for a well deserved break.”

“All restrictions being lifted abroad so I can go abroad”

“I look forward to travelling to other countries freely again with my friends and family to create new memories.”

“I wish to visit my overseas family. I haven't seen them since 2019. But with all these rules changing overnight I think I will stay put for now.”

There is disdain for face masks and many people will be glad to be rid of them

“Getting back to normal at work and not having to wear a mask”

“Not wearing a mask as fed up with it!”

“Going to football matches. Generally moving about/shopping etc without these pointless face nappies”

And some are longing for freedom and the ability to be spontaneous to return

“Going out whenever and where ever”

“Being able to act on impulse , for example just going to a restaurant and not having to book.”

“Seeing friends and family freely, going where I want when I want. Not having someone tell me what I can and can't do”

“Just having the freedom to do what I/we want when we want and not have the underlying fear that everyone is a potential carrier of the virus.”

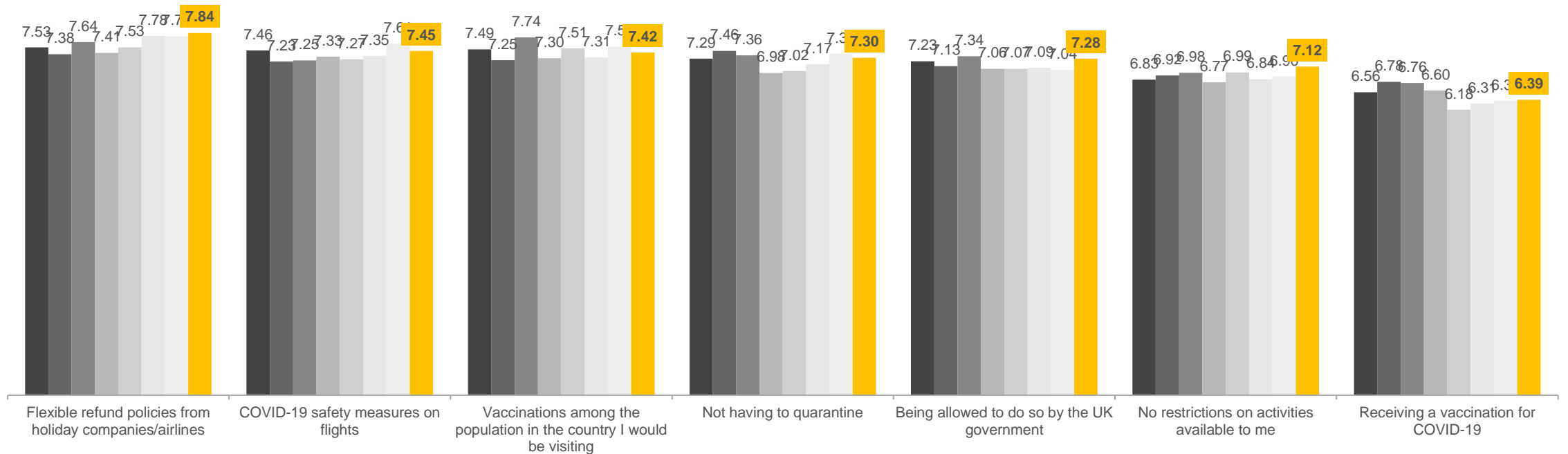


Not being limited in holiday activities has increased in importance but flexible refund policies remain the most important aspect to make travellers feel comfortable in booking an overseas

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 ■ 04-Jun ■ 11-Jun



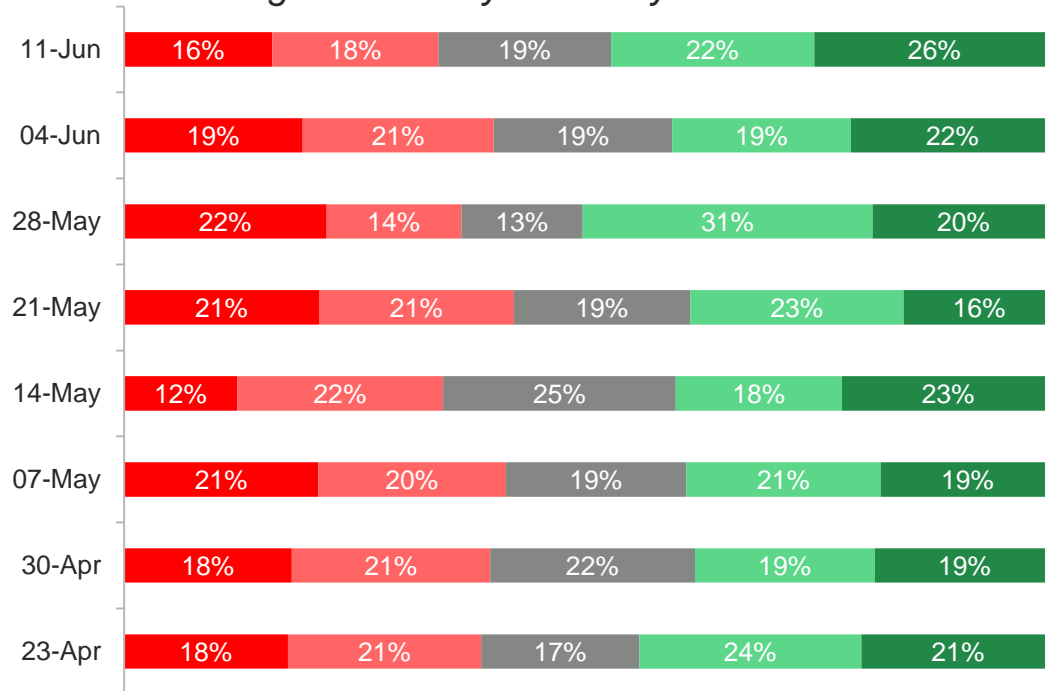
Source: OMD Radar Survey. Those who ever take overseas holidays. 23/04:200, 30/04:200, 07/05:210, 14/05:202, 21/05:197, 28/05:197, 04/06:192, 11/06:208.



There have been marginal increases in the percentage of travellers and long-haul travellers that feel comfortable taking long-haul flights from 2022 onwards

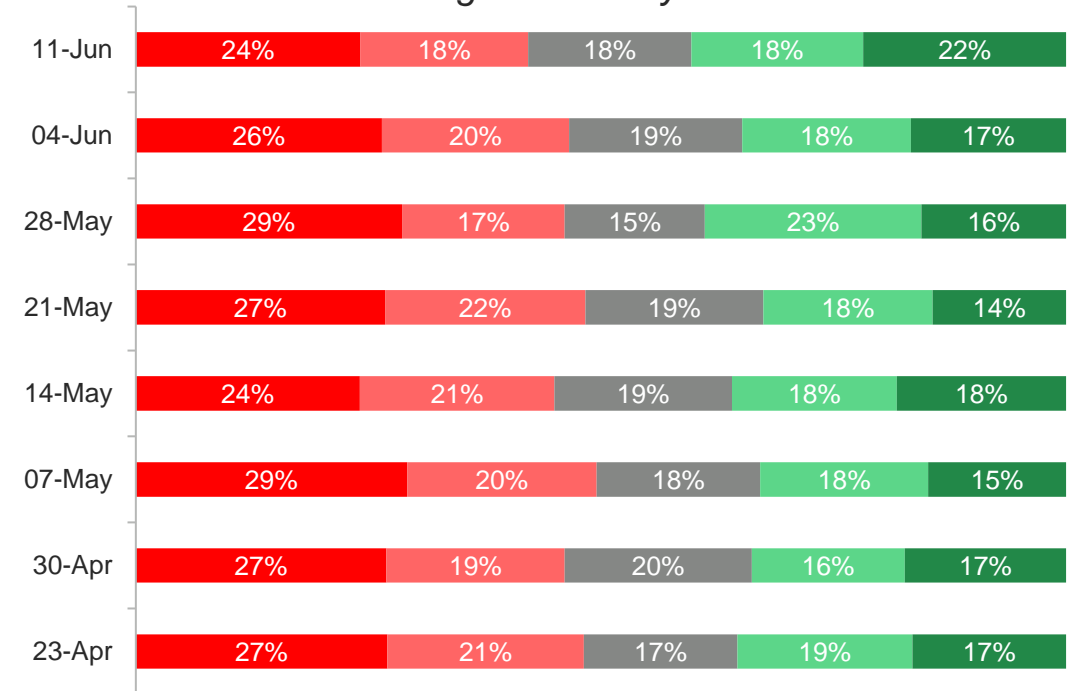
How comfortable would you feel taking a long haul flights (e.g. to Asia, Australia etc.) from 2022 onwards?

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, 04/06:204, 11/06:211

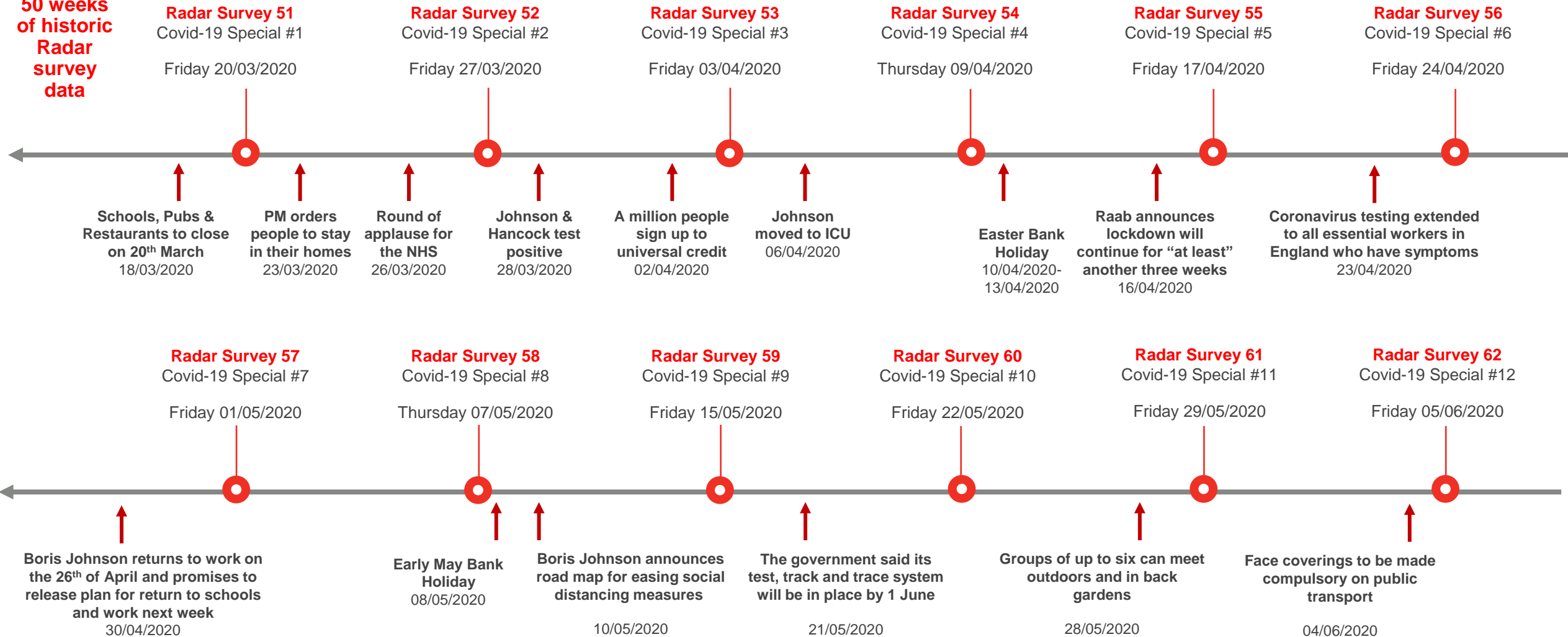
Been on a long-haul holiday in the last 5 years, 23/04: 159, 30/04:150, 07/05:139, 14/05:140, 21/05: 148, 28/05:138, 04/06:146, 11/06:151

Appendix



Survey Timeline

50 weeks
of historic
Radar
survey
data





Survey Timeline

62 weeks
of historic
Radar
survey
data

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



Non-essential
retailers reopen
15/06/2020

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



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

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



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



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

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



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

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



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



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

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



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

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



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

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



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

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



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

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



Bank Holiday
31/09/2020



Survey Timeline

74 weeks
of historic
Radar
survey
data

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



'Eat Out to Help
Out' ends for
most
restaurants

01/09/2020

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



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

09/09/2020

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



Revised government
restrictions on social
gatherings come into
place

14/09/2020

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



PM warns UK to
follow COVID
restrictions or risk
second lockdown

22/09/2020

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



Extended local
lockdown
measures in the
North East

01/10/2020

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



Boris to announce
tiered approach to
lockdown
measures

12/10/2020

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



London moved to
Tier 2 COVID alert
level

15/10/2020

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



Greater Manchester and
areas in the Midlands move
to Tier 3

20/10/1010-23/10/2020

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



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

31/10/2020

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



National lockdown in
England begins

05/11/2020

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



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

09/11/2020

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



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

18/11/2020



Survey Timeline

86 weeks
of historic
Radar
survey
data

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



Black Friday
27/11/2020

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



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

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



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

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



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

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



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

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



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

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



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

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



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

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



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

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



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

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

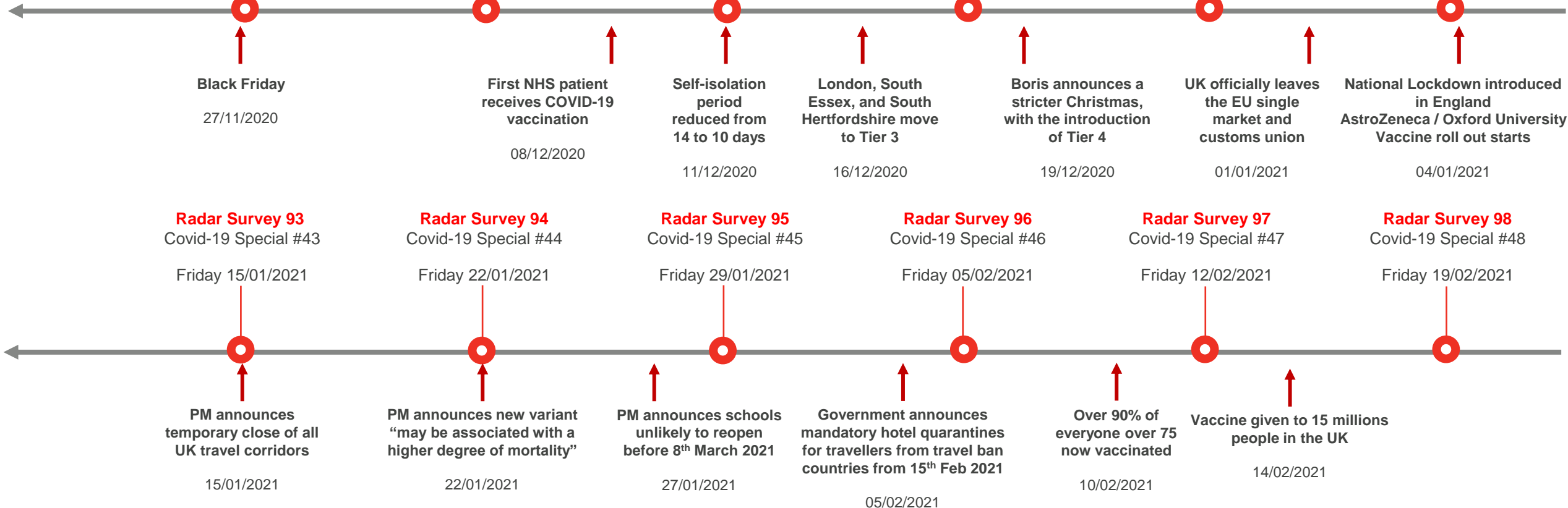


**Over 90% of
everyone over 75
now vaccinated**
10/02/2021

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



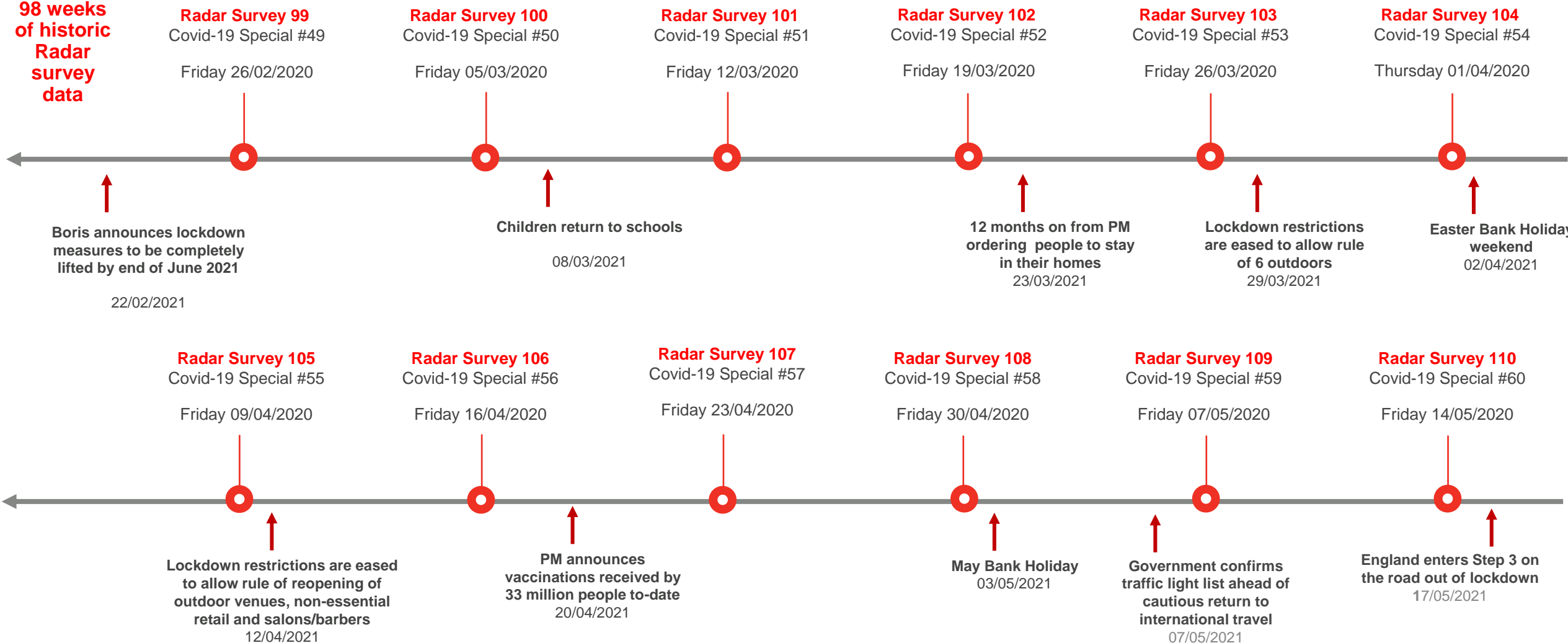
**Vaccine given to 15 millions
people in the UK**
14/02/2021





Survey Timeline

98 weeks
of historic
Radar
survey
data





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

Radar Survey 113
Covid-19 Special #63
Friday 04/06/2021

Radar Survey 114
Covid-19 Special #64
Friday 11/06/2021

↑
Boris Johnson announces plan for a new 'Global Pandemic Radar' to identify and track new COVID variants and emerging diseases
21/05/2021

↑
May Bank Holiday
31/05/2021

↑
Portugal moved to amber list to guard public health against variants of concern following first traffic light review
04/06/2021

↑
Euros 2020 Commences
11/06/2021

↑
PM announces that 'Step 4' on the road out of lockdown will be delayed from 21st June to 19th July
14/06/2021

