TRAJECTORY

Optimism Index
November 2021

Pandemic Analysis

Sample Information and Methodology

- Every month, Trajectory survey a nationally representative sample of 1500 respondents on a variety of issues, including consumer confidence, personal choice and control, social trust, opportunities in technology, optimism and their place in the world.

- Due to current circumstances surrounding the Coronavirus pandemic, additional questions have been added in recent months examining both the current climate in general as well as the impact that the pandemic is having on certain views in relation to finances, confidence and spending, amongst others.

- All surveys were carried out online, with fieldwork this month taking place between **9th – 17th November.**

Key Findings

- Impact of pandemic on household finances remains a concern for almost half
- Excess savings in decline in approach to Christmas as spending expectations rise
- Demand for out of home leisure stalls despite prospect of more sociable festive period
- Concerns about visiting public spaces rise slightly amidst growing concerns over Winter approach
- Rise in concerns about public health drives slight increase in sense of new seriousness
- Older cohorts the driving force behind rising seriousness whilst younger generations remain cynical
- Remote working continues to remain significantly more prominent than pre-pandemic levels

Last Month's Key Events

15th October – The White House confirms the United States will reopen its borders to fully vaccinated people from the UK, from 8 November

18th October – Vaccine passport scheme becomes enforceable by law in Scotland

20th October – Sajid Javid warns that 'Plan B' measures such as mandatory face coverings and working from home will be needed if vaccine rates are not high enough

24th October – New rules come into force allowing fully vaccinated travellers returning to England to take lateral flow tests instead of PCR tests

25th October – UK Government confirms that the NHS will receive extra £5.9 Billion in funding in upcoming budget

27th October – Chancellor Rishi Sunak delivers Autumn Budget in which he says the economy is expected to return to pre-COVID levels by the end of the year

31st October – Climate Change Conference COP 26 begins in Glasgow after being postponed in 2020 due to the pandemic

1st November – Booster jabs without a prior appointment become available in England for those who had their second vaccine more than six months ago

4th November – Molnupiravir, the first tablet designed to treat COVID-19, is given approval for use in the UK

6th November – The Government announces minor changes to the booster vaccine booking process from 8 November, allowing people to book them a month in advance

9th November – Sajid Javid confirms it will be mandatory for frontline NHS staff in England to have both vaccines, with a deadline of April 2022

11th November – New rules come into place requiring care home staff in England to be double vaccinated

15th November – UK Terror Threat Level raised from substantial to severe following bombing at women's hospital in Liverpool

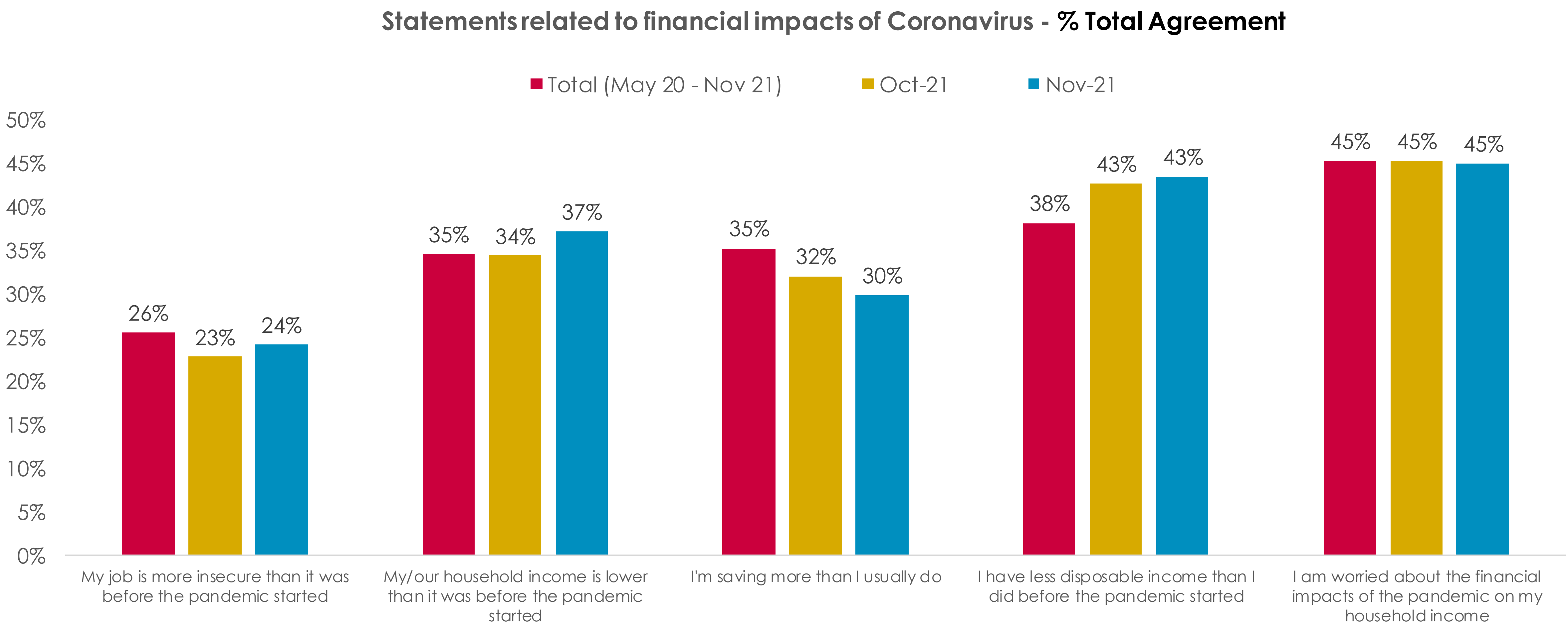
16th November – JCVI extends the booster vaccine programme to all adults over the age of 40, whilst also offering 16-17 year olds second doses

Fieldwork: 9th – 17th November

Financial Implications

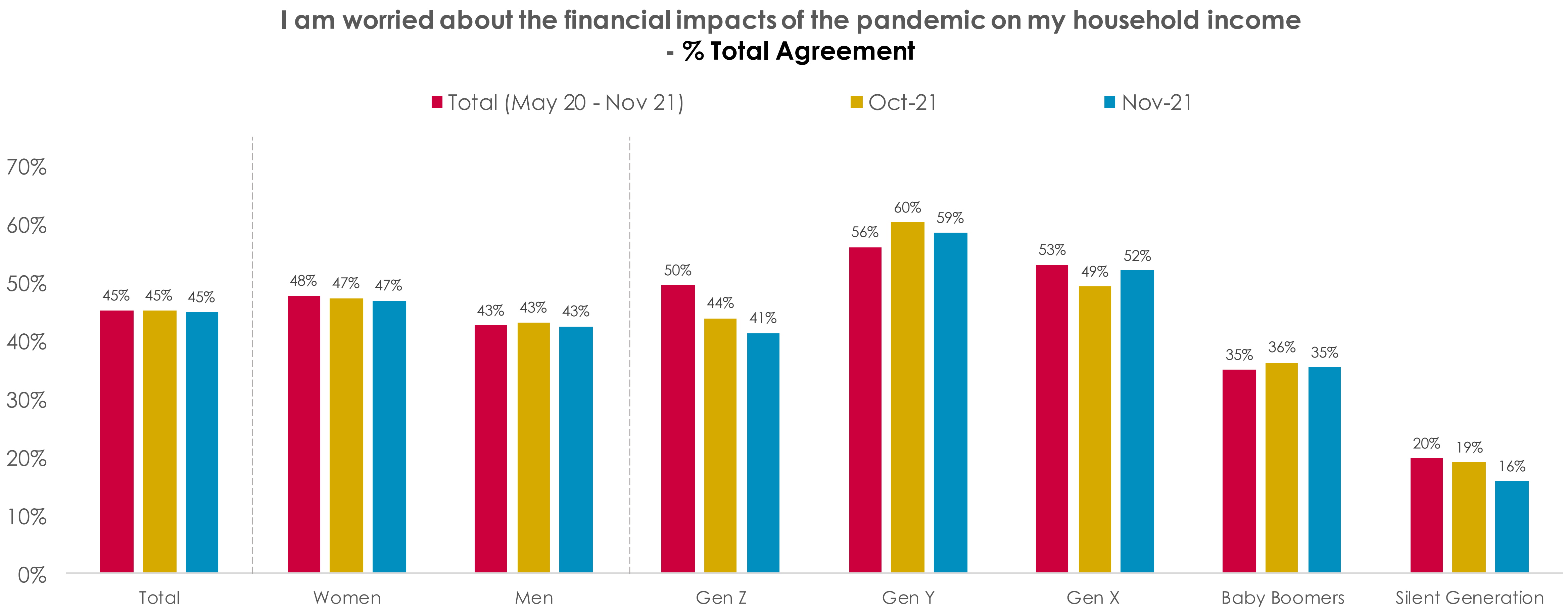
Excess savings in decline as we approach Christmas period

- Proportion currently saving more than usual down 2% compared to October, and down 5% compared to pandemic average
- For second consecutive month, proportion with less disposable income than usual up 5% compared to pandemic overall
- Almost half still concerned about the impacts of the pandemic on their household income



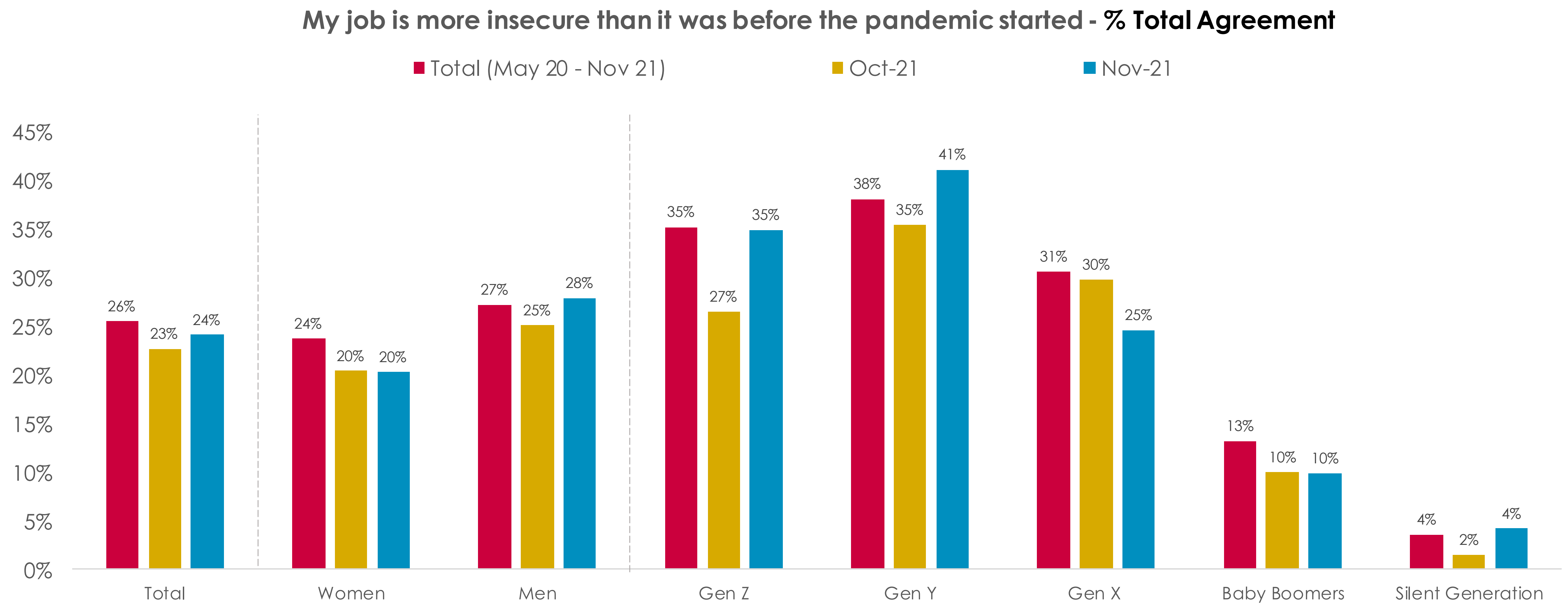
Financial concerns most prominent amongst women and Gen Y

- More than half of both Gen Y and Gen X feel concerned about financial impacts of pandemic – Gen X up 3% this month
- Concerns fall further amongst Gen Z this month, now down 9% compared to pandemic average (41% to 50%)
- Women and men see little change this month – concerns still greater amongst women (47% to 43%)



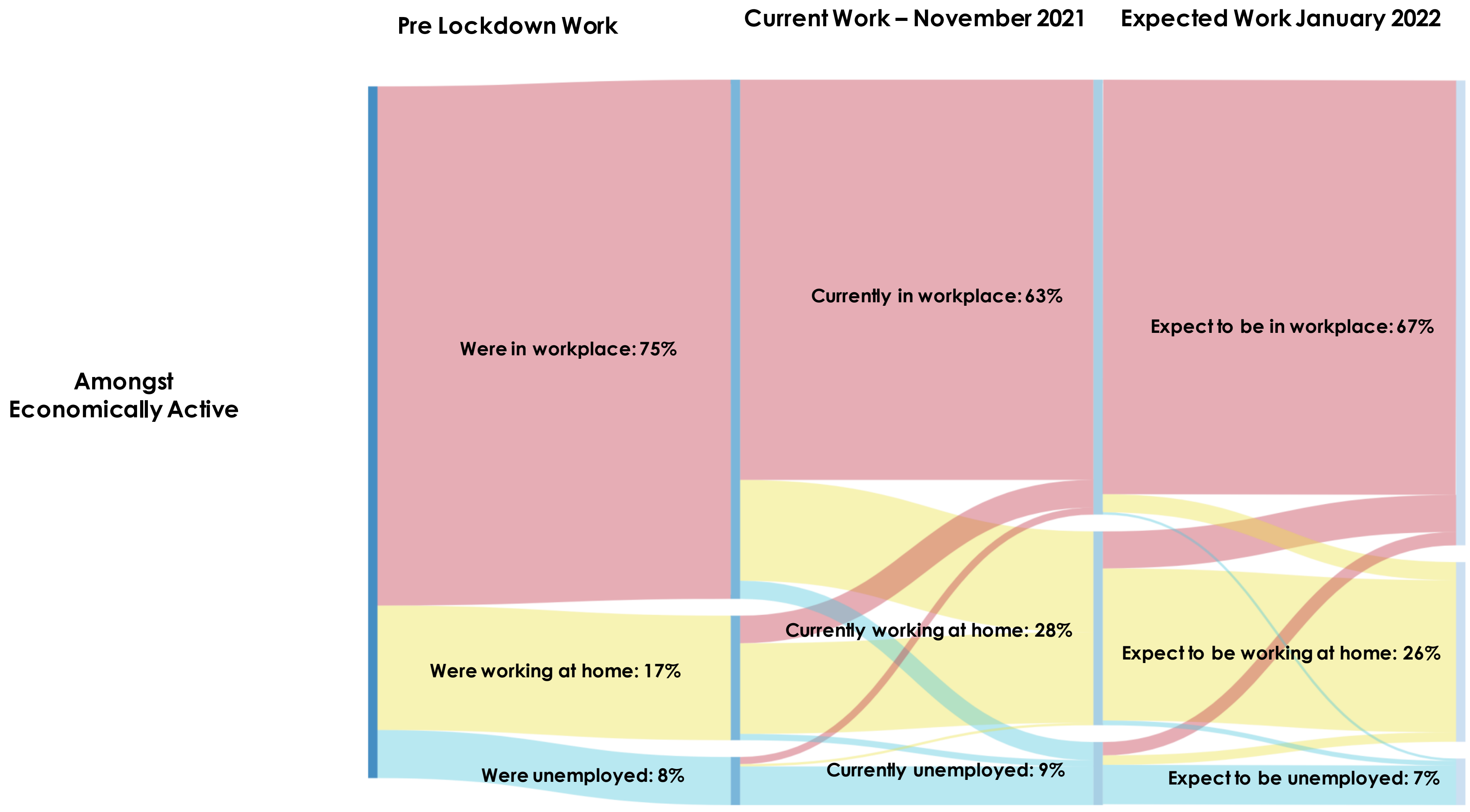
Younger generations experience rise in job insecurity

- Sense of insecurity rises by 8% amongst Gen Z this month (27% to 35%) whilst Gen Y see a 6% increase
- Men continue to adopt a greater degree of concern regarding security of their job, up 3% this month (25% to 28%)



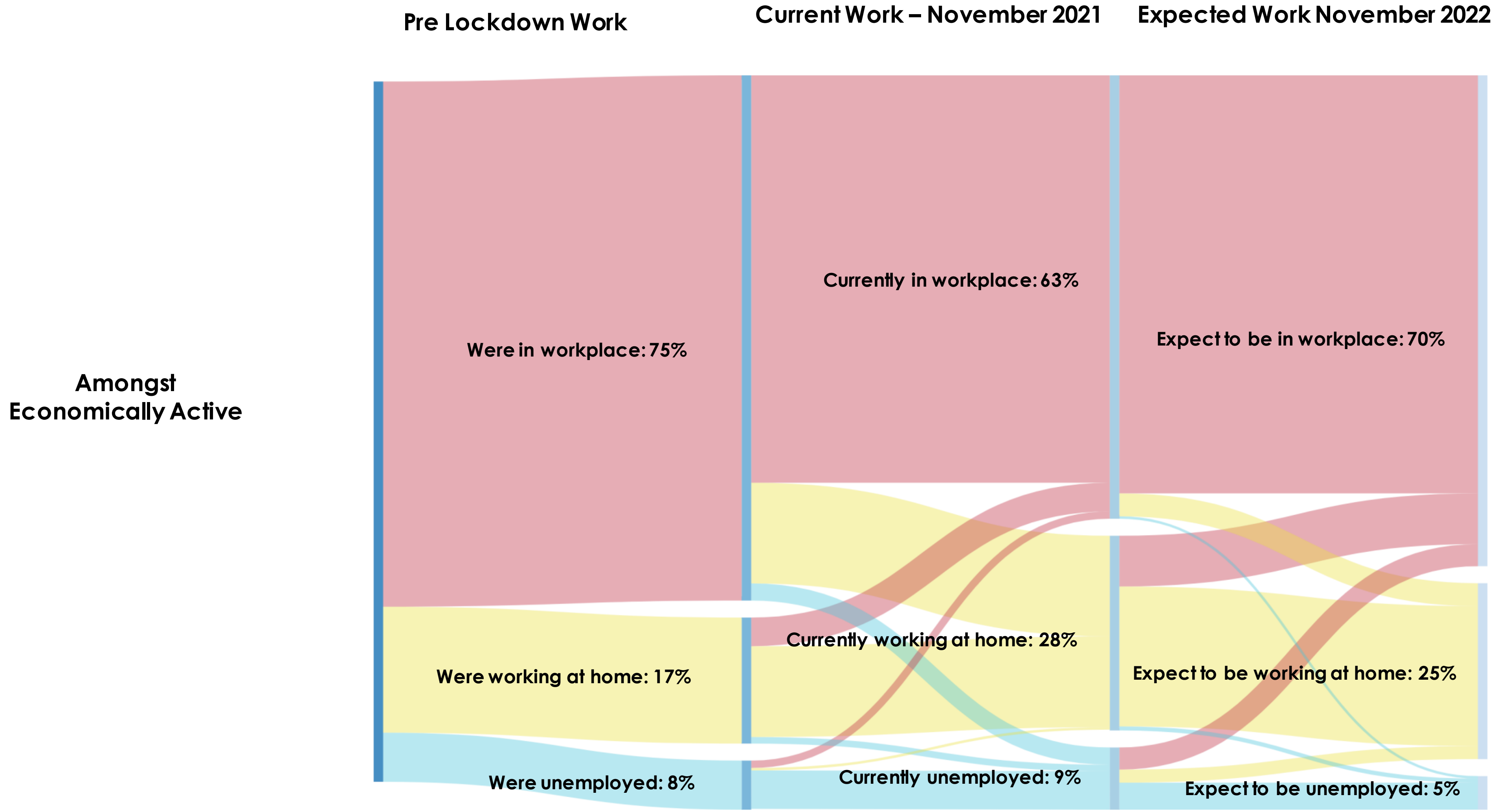
Short term employment expectations edge nearer pre-pandemic levels

- Proportion expecting to be in the workplace by start of next year up to 67% this month – 8% fewer than pre-pandemic
- Remote working refuses to fall away, with more than a quarter still predominantly working from home (28%)



Longer term expectations anticipate further movement back to workplace

- 70% expect to be in the workplace by this time next year – up 7% compared to current levels
- Remote working will continue to play a more important role than pre-pandemic, still expected to be up 8%

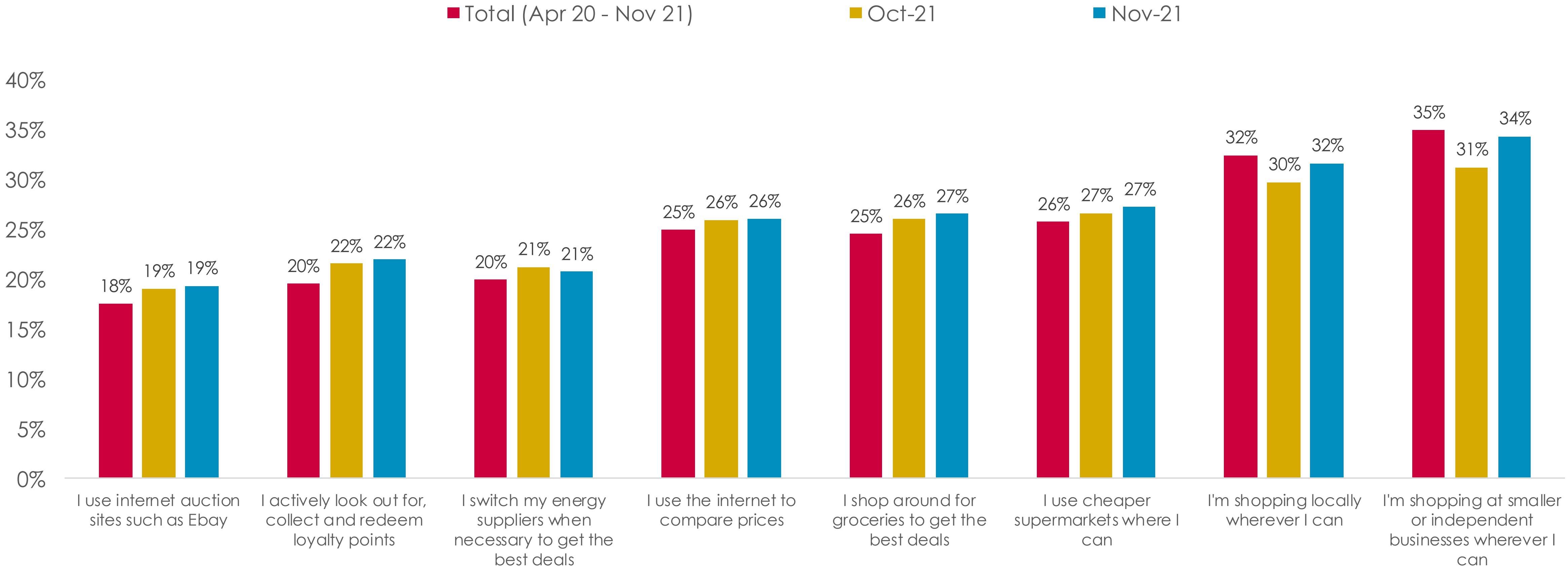


Impacts on Shopping Habits

Local independent businesses receive welcome boost

- Proportion who have recently begun shopping at independent businesses up by 3% this month (31% to 34%)
- Those who have recently begun shopping locally wherever possible also up by 2% this month
- Price conscious behaviours such as shopping around and using budget supermarkets continue to rise in popularity

Below are a list of shopping activities. Please select all activities which you *have started doing recently*



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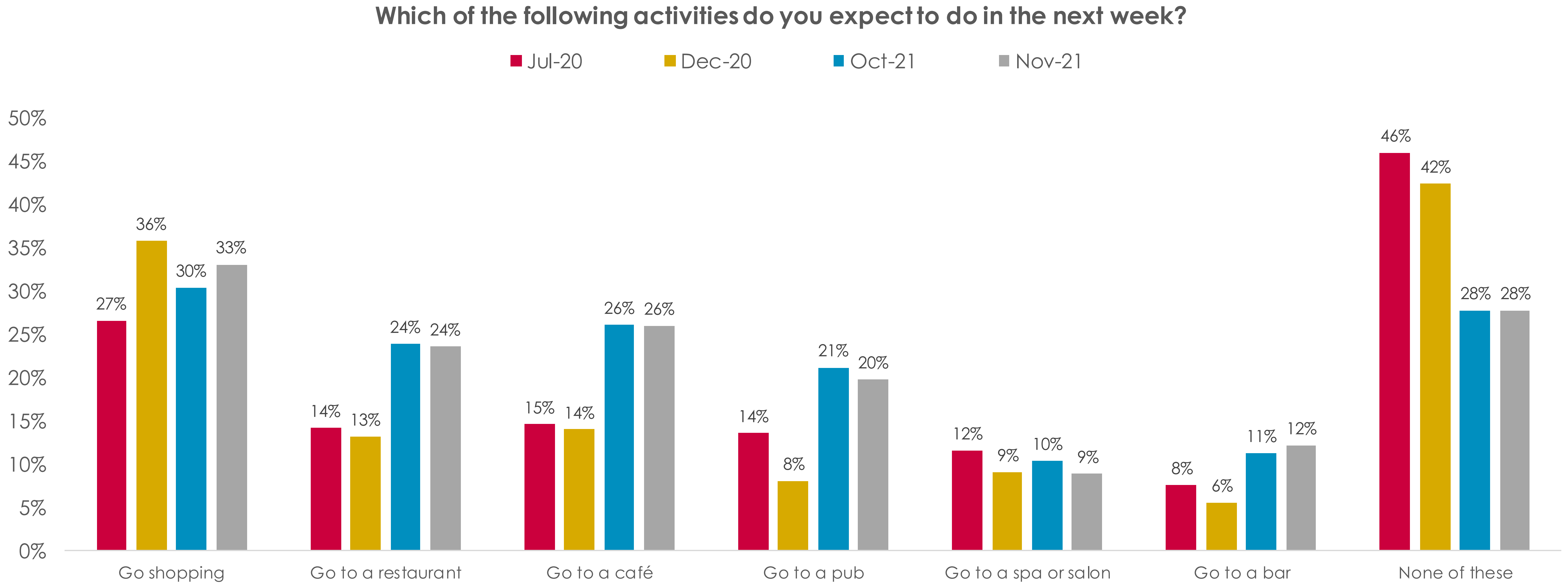
Demand for leisure activities stalls as we approach to Christmas

- Only shopping (non-grocery) sees significant increase this month, up 3% from October (30% to 33%)
- Proportion expecting to visit a restaurant or café remains the same as was seen last month
- More than one in four still expect not to do any of the listed activities within the next week

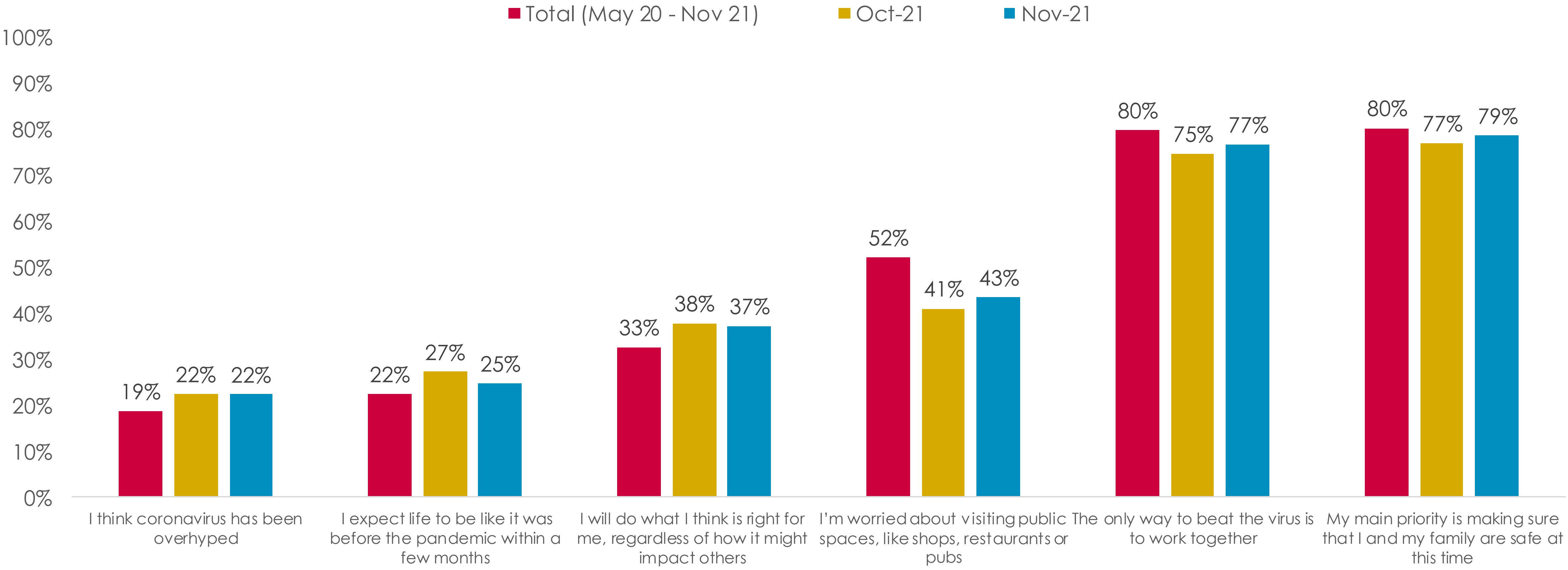


Social Implications

Concerns over public spaces rise slightly amidst Winter concerns

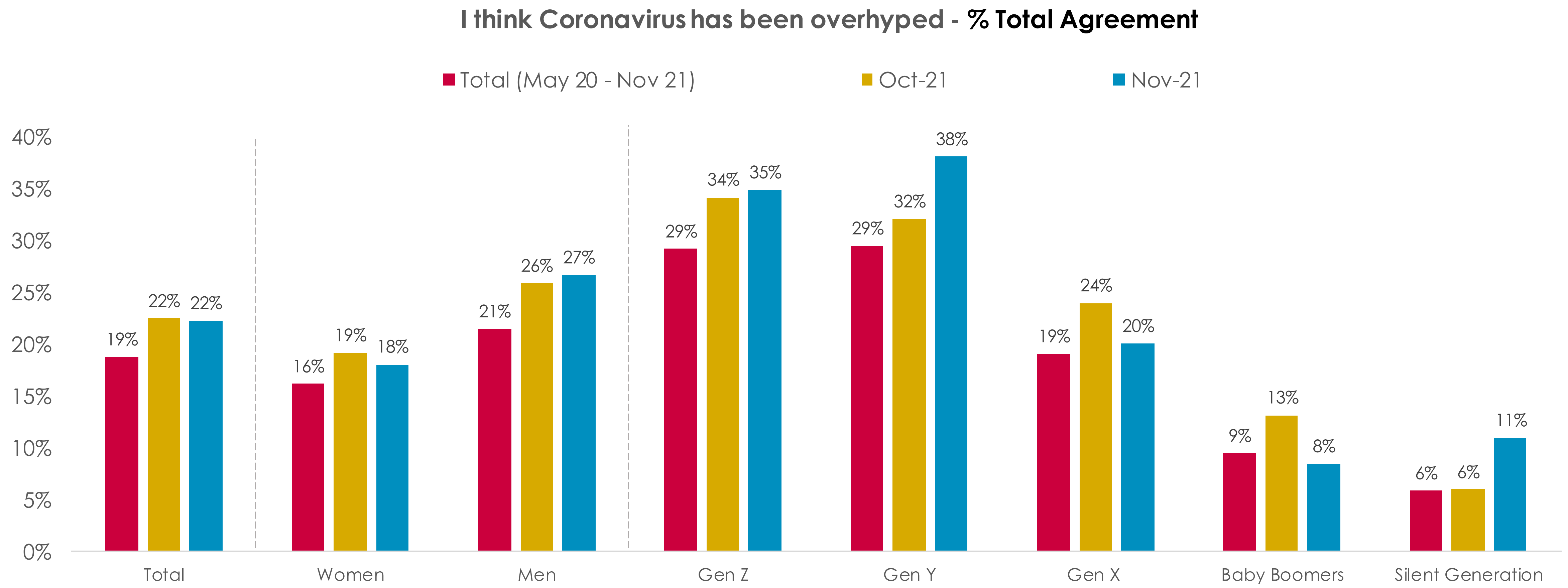
- Proportion worried about visiting public spaces up 2% this month – the first increase seen since July
- Community spirit still less prominent than at earlier phases of the pandemic, despite slight rise this month
- Pandemic cynicism stalls at somewhat low level as concerns remain prominent for many

Statements related to social impacts of Coronavirus - % Total Agreement



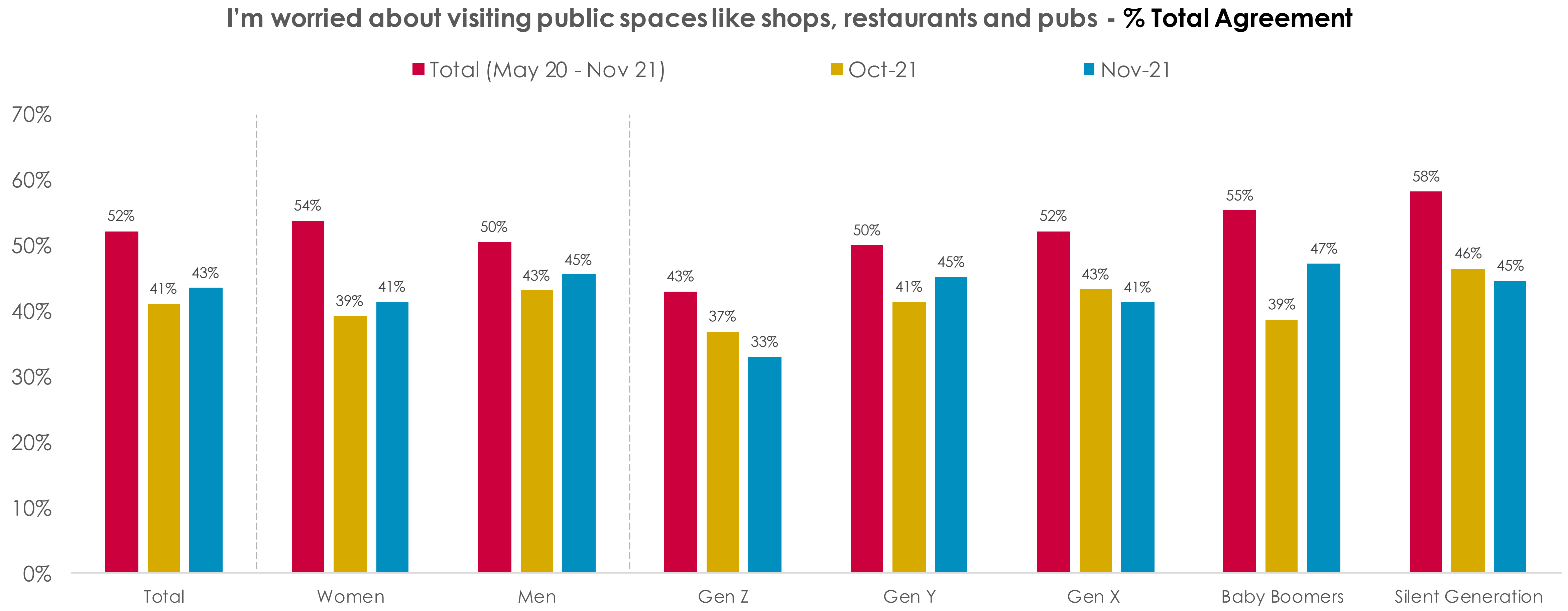
Cynicism far more prominent amongst younger generations

- Proportion of Gen Z who feel that pandemic has been overhyped up 1% this month, whilst up 6% amongst Gen Y
- Despite increase this month amongst Silent Generation, older cohorts feel greater sense of seriousness
- Men continue to adopt more cynical views towards pandemic than women, seeing a 1% rise this month



Baby Boomers the driving force behind rise in public health concern

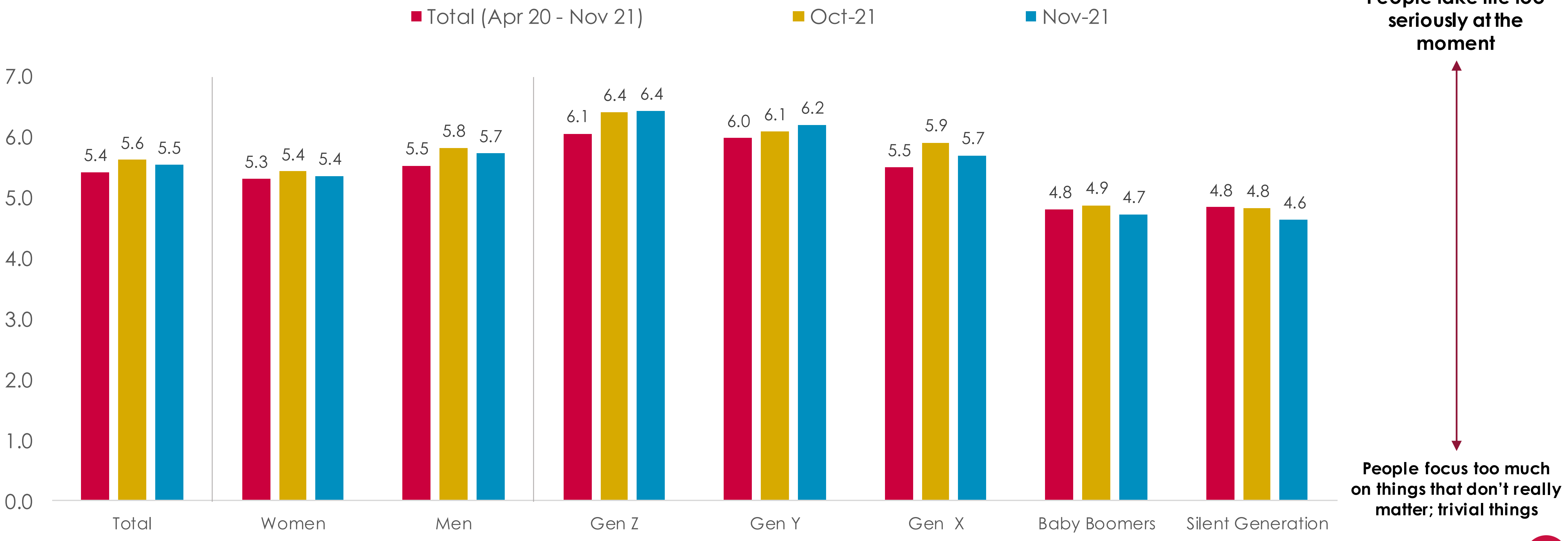
- Proportion of Baby Boomers feeling concerned about visiting public spaces up 8% this month (39% to 47%)
- In contrast, Gen Z experience a further decline in concerns this month, now down to just 33% - 10% below pandemic average
- Both men and women experience increase in concerns over visiting public spaces of 2% this month



New seriousness increases slightly amidst growing health concerns

- Average scores fell by 0.1 this month from 5.6 to 5.5, indicating a slight shift towards a greater sense of seriousness
- Older generations the driving force behind this finding, with Gen X, Baby Boomers and Silent Generation each seeing 0.2 declines
- Gen Z and Gen Y continue to adopt a less serious outlook, with average scores for Gen Y increasing by 0.1

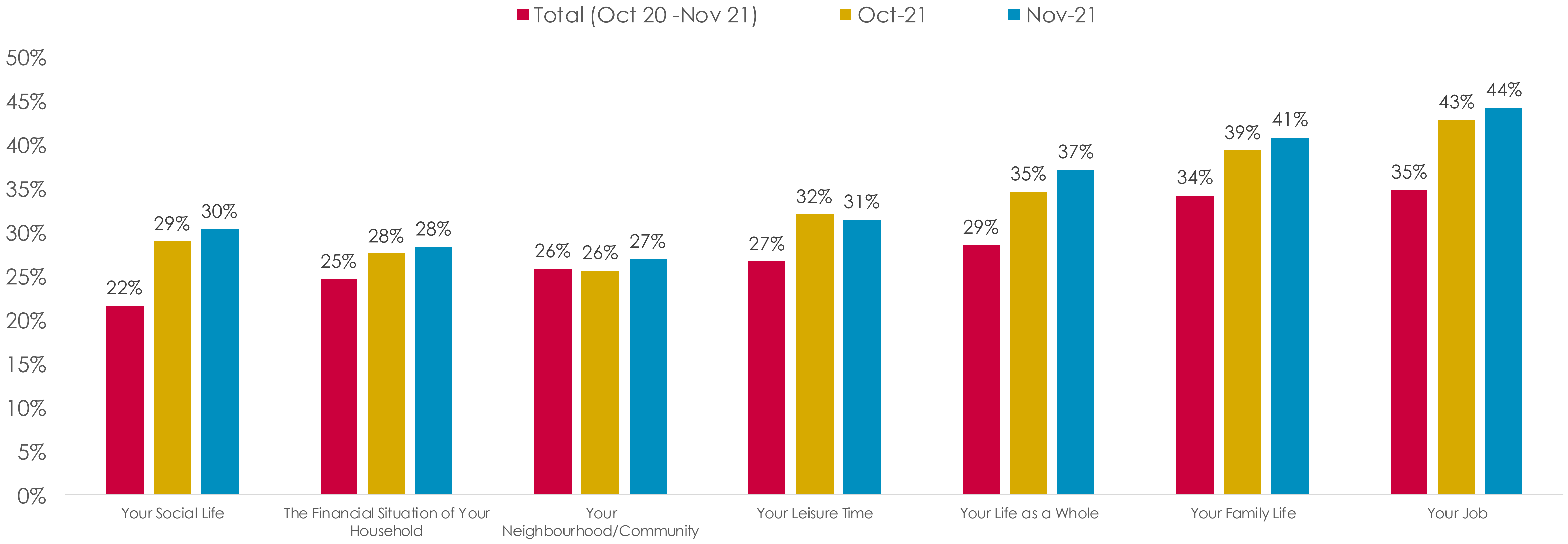
On a scale from 1 to 10, please indicate to what extent you feel people take life too seriously
[Average Response]



Consumers grow more satisfied with post-pandemic lives

- More than a third (37%) now feel more satisfied with their life as a whole compared to pre-pandemic
- Proportion more satisfied with family life and jobs also rise this month, with at least four in ten saying they are more satisfied
- Respondents slightly less likely to feel more satisfied with leisure time than compared to pre-pandemic this month

For each of the following, please state whether you feel more satisfied, less satisfied or about the same as you did compared to before the pandemic? [% Saying More Satisfied]

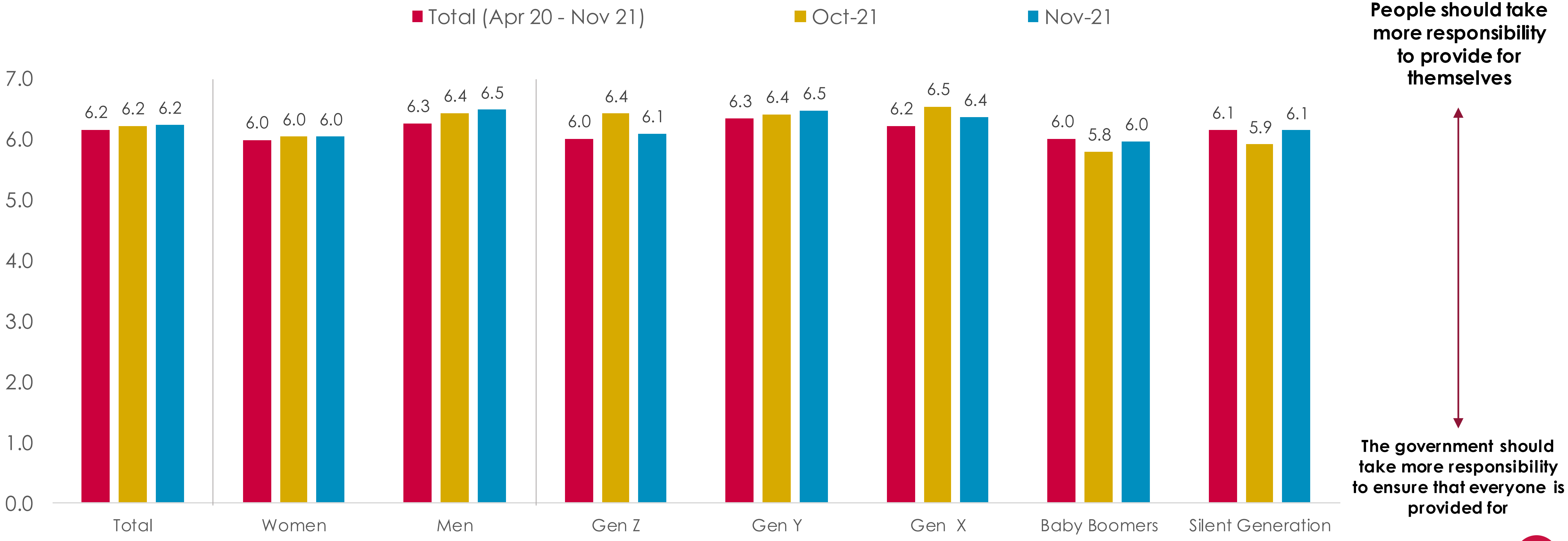


Priorities

Men remain more likely to demand personal responsibility than women

- Men see a 0.1 point rise this month from 6.4 to 6.5, whilst women see an average of 6.0 for second consecutive month
- Older cohorts experience rise in demand for personal responsibility, each seeing a 0.2 point rise

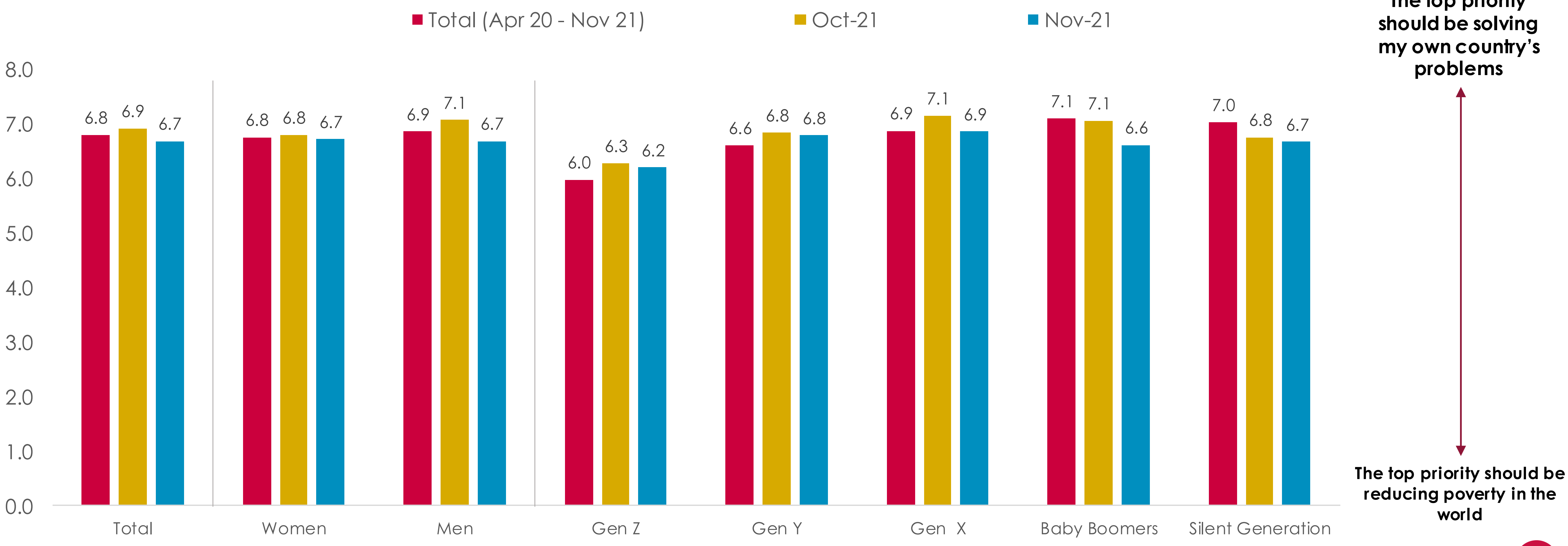
On a scale from 1 to 10, please indicate to what extent you feel it is the Government's responsibility to ensure everybody is provided for *[Average Response]*



Rising cases elsewhere in Europe drives focus on resolving world issues

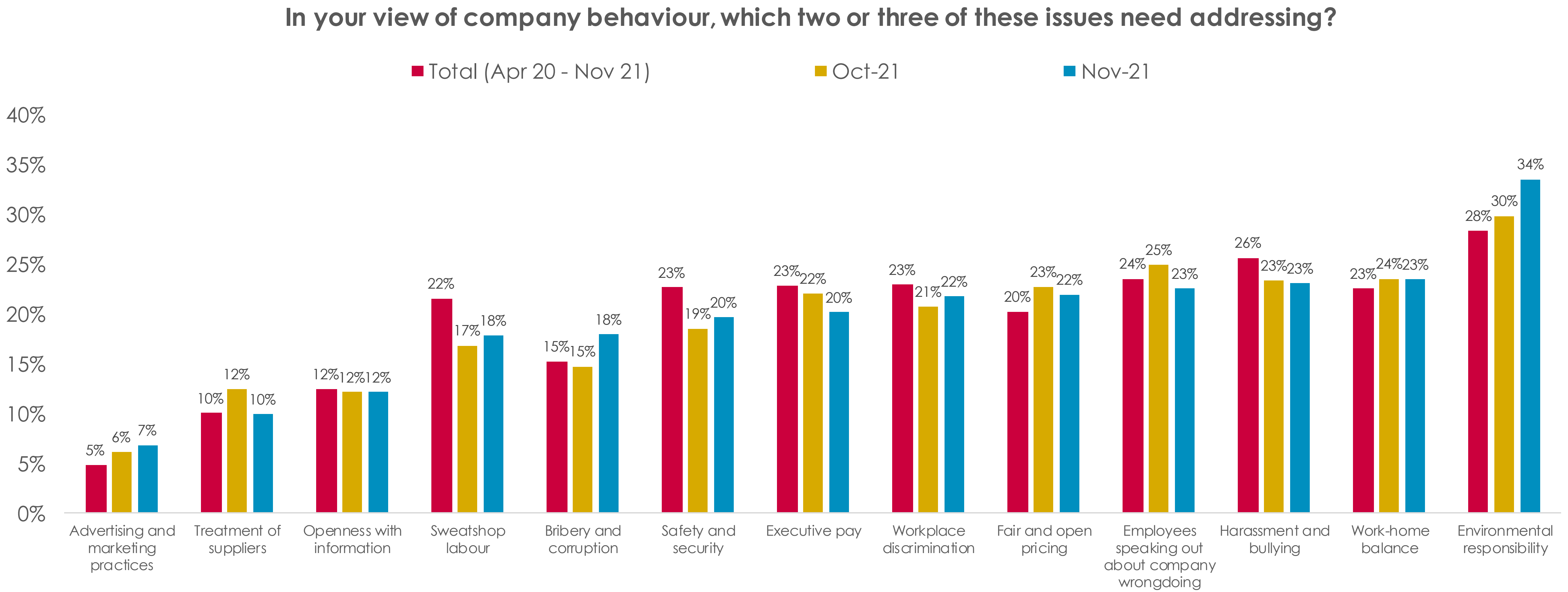
- 0.2 point decline this month across total sample implies shift away from focusing on domestic issues
- Gen Z remain most likely to focus on reducing issues outside UK, seeing a further 0.1 point decline this month (6.3 to 6.2)
- Cohorts typically more domestically focused, such as Baby Boomers, see sharp decline in average score this month

On a scale from 1 to 10, please indicate what you feel the top priority for the UK Government should be
[Average Response]



COP 26 helps shift focus towards environmental responsibility of brands

- Proportion who feel that companies should focus on environmental responsibility up 4% this month, now 6% higher than pandemic average
- Safety and security now less of a priority given the rollout of vaccines, despite ongoing concerns amongst many



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Each month Trajectory survey 1500 adults in the UK on a range of issues including consumer confidence, personal choice and control, social trust, opportunities in technology, optimism and their place in the world.

This data is analysed and produces The Optimism Index. The data presented here is a snapshot of the full data, which can be used for bespoke analyses on request – including time-series analysis (from 2011 onwards) and global comparisons.

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