TRAJECTORY

# Optimism Index December 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 **7th and 13th December.**

# Key Findings

- Financial concerns relating to pandemic rise as cost of living increases further
- Younger generations remain the primary source of financial concerns
- Price conscious behaviours such as shopping around for groceries grow more prominent
- Appetite for out of home leisure rises slightly in the approach to Christmas period
- Rising Omicron cases drive growing concerns about visiting public spaces
- Gen Z experience sharp increase in degree of cynicism expressed about pandemic
- Generations grow further polarised by the level of new seriousness adopted

# Last Month's Key Events

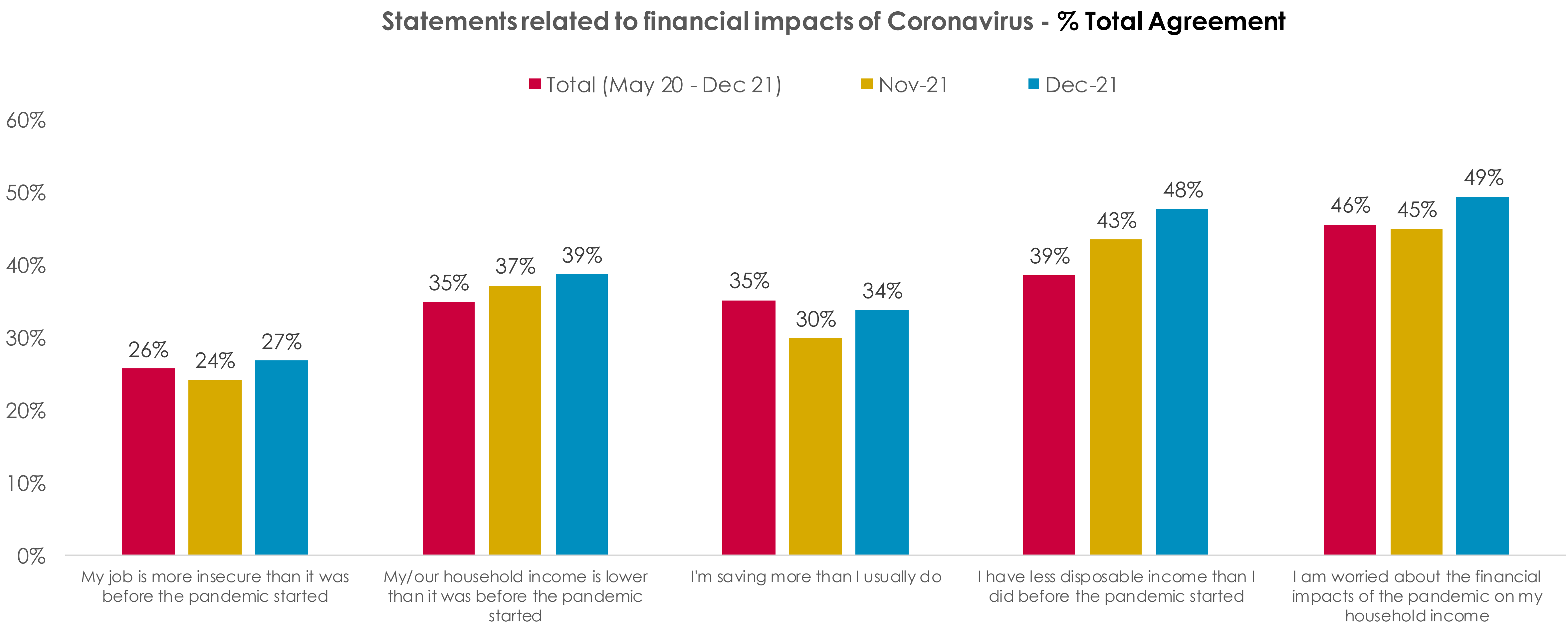
- **17th November** – Northern Ireland's ministers vote to introduce mandatory COVID passports for Northern Ireland from December
- **19th November** – Travellers from England become eligible to add their booster vaccine status to the NHS COVID Pass
- **22nd November** – People aged over 40 in England become eligible to book their COVID booster vaccination
- **25th November** – Six countries in Africa are added to UK travel red list amid concerns of a new COVID variant that may be more transmissible than previous variants
- **27th November** – Sajid Javid confirms that two cases of the new variant, named Omicron, have been found in the UK
- **29th November** – The JCVI suggests that all adults over the age of 18 should receive a booster dose of vaccine
- **1st December** – The number of Omicron cases in the UK rises to 32 whilst Government continues to suggest festive plans should not be cancelled
- **2nd December** – Bereaved families for justice group is 'sickened' by reports of a party held in Downing Street on 18th December 2020 when restrictions were in place
- **4th December** – Sajid Javid states that travellers to the UK will need to take a pre-departure COVID test from 7th December
- **6th December** – Sajid Javid confirms there is community transmission of the Omicron variant in several communities within England
- **7th December** – A video shows senior Downing Street staff joking about a party days after one was held while the UK was under COVID restrictions in December 2020
- **8th December** – The UK moves to plan B restrictions, reintroducing mandatory face coverings and encouraging working from home
- **10th December** – The UK Health Security Agency forecasts that the Omicron variant could be the dominant strain of COVID by the end of December
- **13th December** – The first UK death linked to the Omicron variant is reported

Fieldwork: 7th – 13th December

# Financial Implications

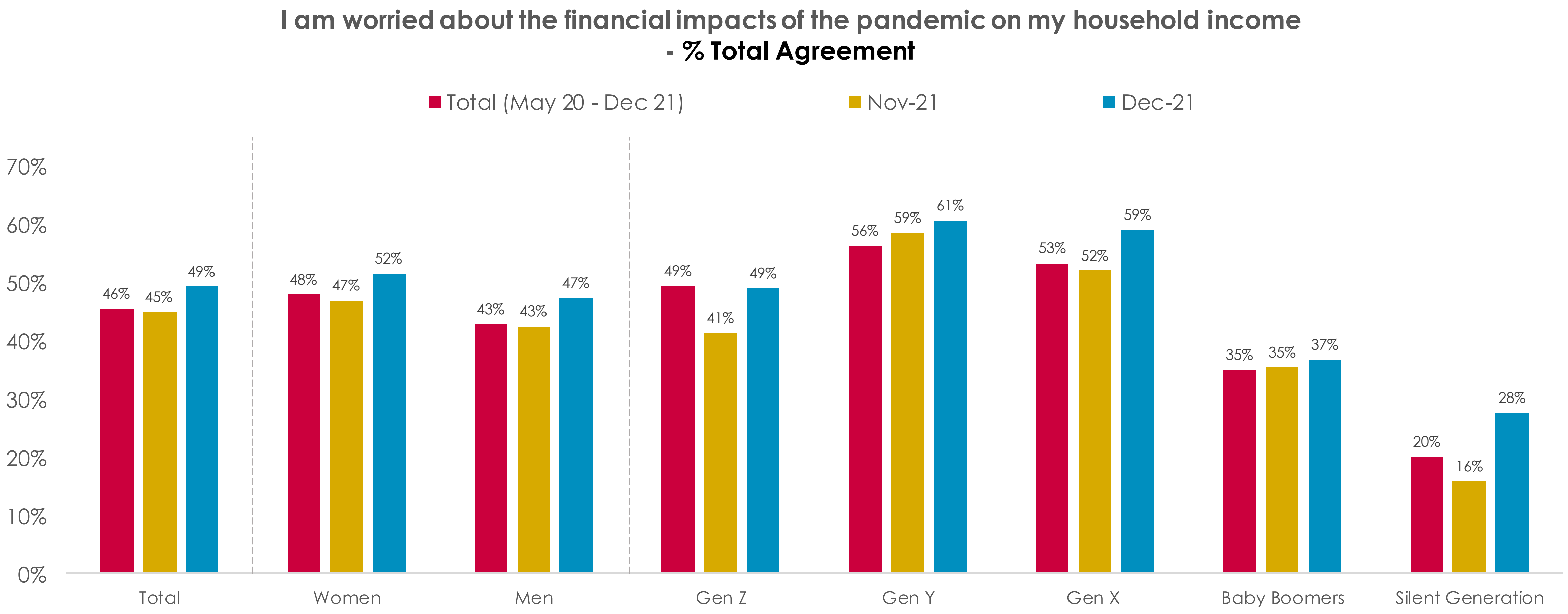
# Financial concerns rise further amidst rising cost of living

- Proportion worried about impact of pandemic on household finances up 4% this month (45% to 49%)
- This month also sees rise in proportion with less disposable income than normal and greater job insecurities
- Such concerns have led to a switch in attitude towards savings, with proportion saving more than normal up 4%



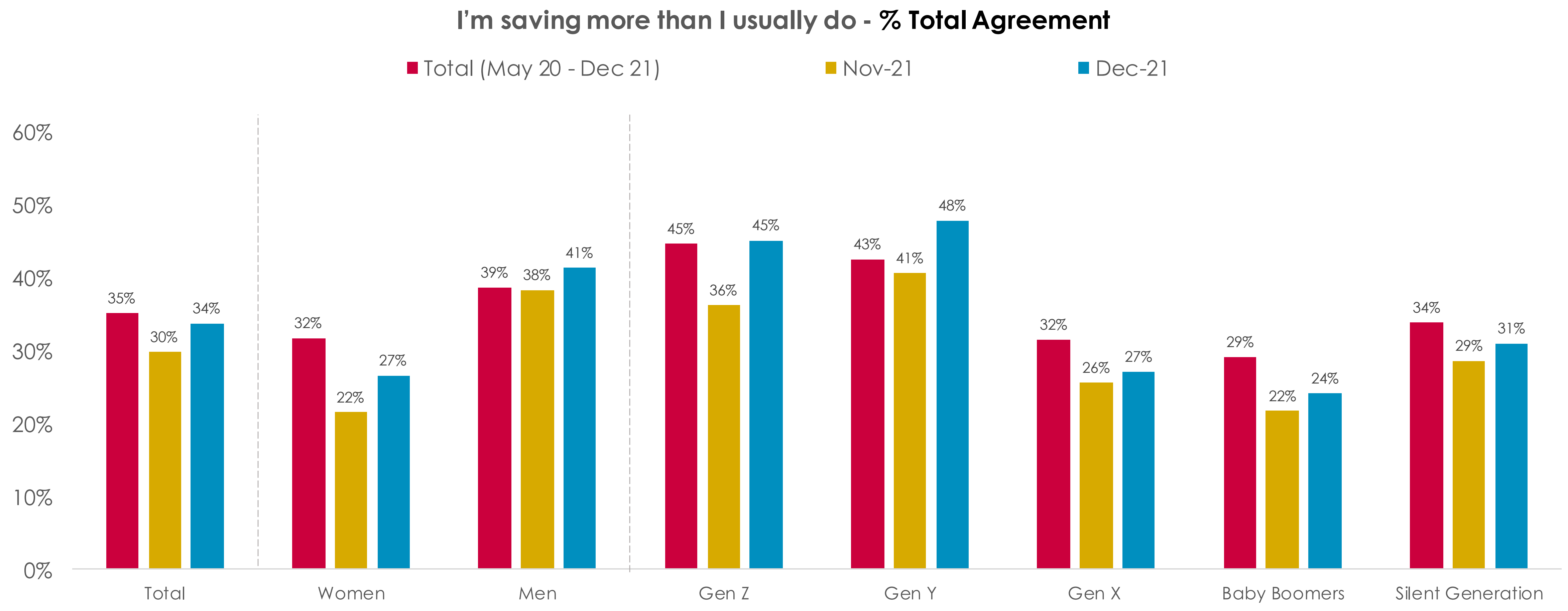
# Financial concerns most prominent amongst Millennials

- Despite seeing just a 2% increase this month, Gen Y remain the most concerned about financial impacts of pandemic
- Gen Z and Gen X see a sharper rise this month, up 8% and 7% respectively
- Women continue to adopt a greater degree of concern financially, also seeing a 5% rise this month



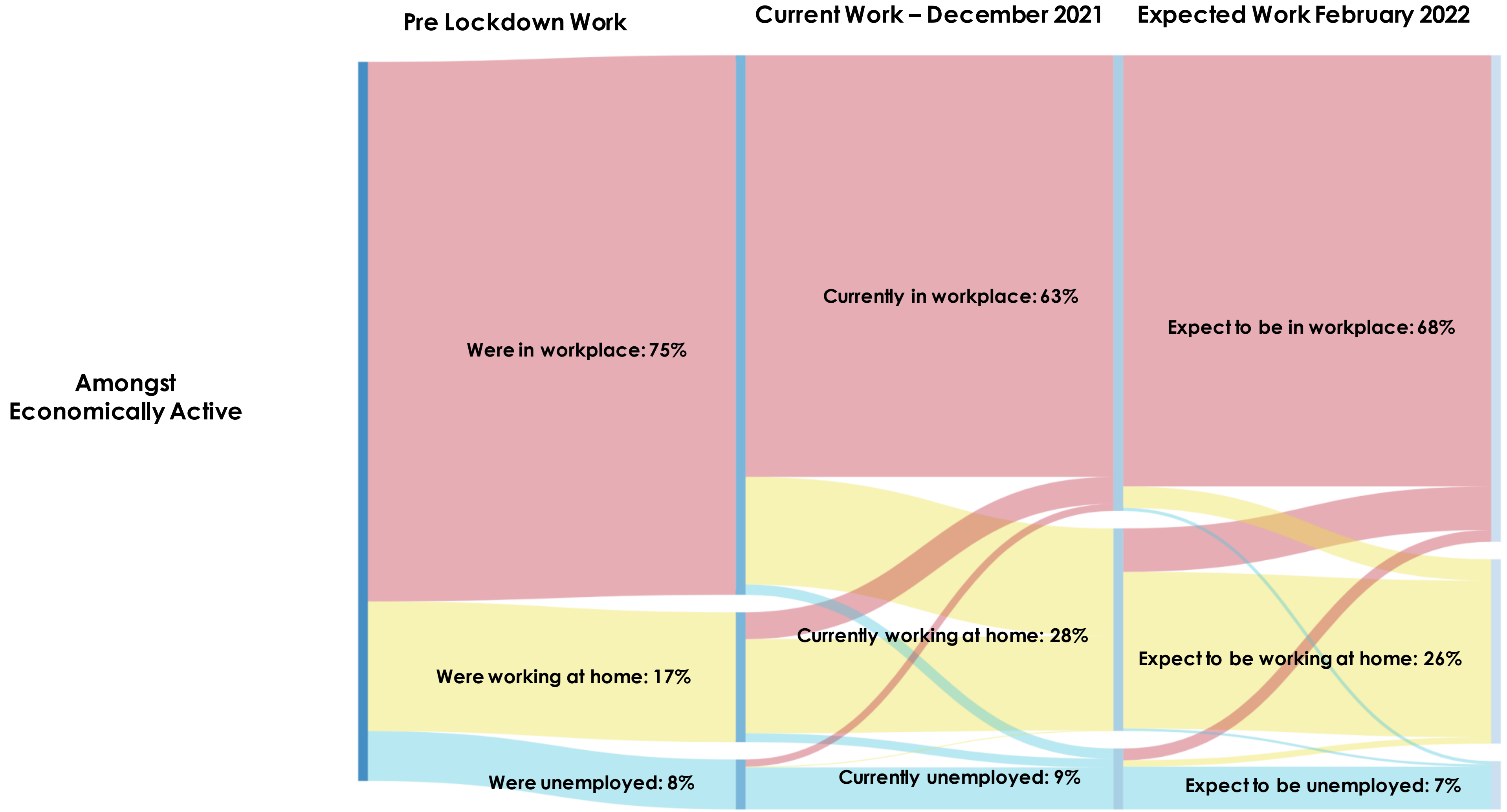
# Younger cohorts drive rise in levels of excess saving

- Compared to topline of just 4%, rise amongst Gen Z and Gen Y is 9% and 7% respectively
- Older generations see slight increase in proportion saving more than usual but lower rise than average
- Men continue to be far more likely than women to be saving more than usual at this moment



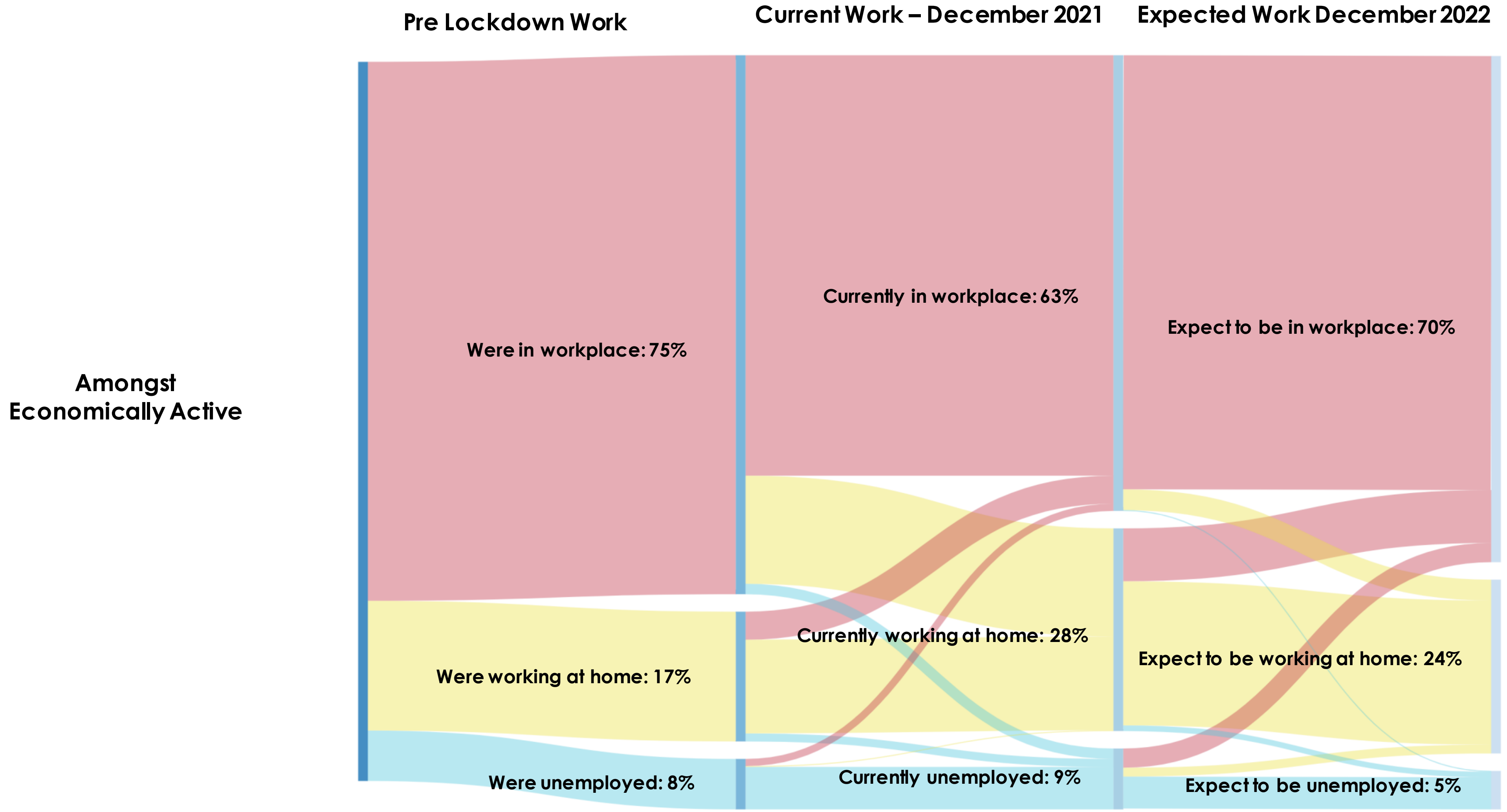
# Well over a quarter of respondents still predominantly remote working

- Proportion working from home most of the time still up 11% compared to pre-pandemic levels
- Unemployment rate a growing concern – almost one in ten report being out of work this month



# Longer term expectations still indicate prominent role for remote work

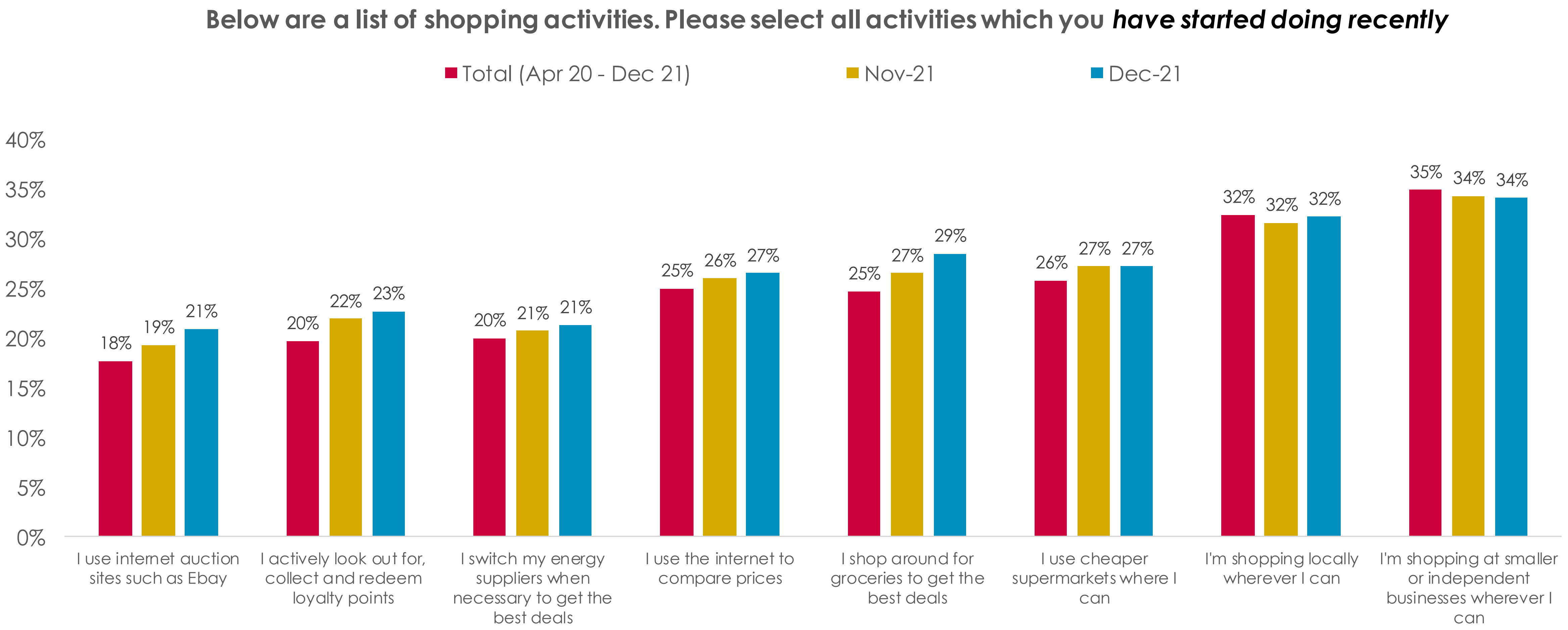
- Whilst proportion expecting to be working remotely this time next year is down 4% compared to current levels, this still stands far higher than the levels seen pre-pandemic, whilst workplace will continue to play a slightly less important role than it did (70% to 75%)



# Impacts on Shopping Habits

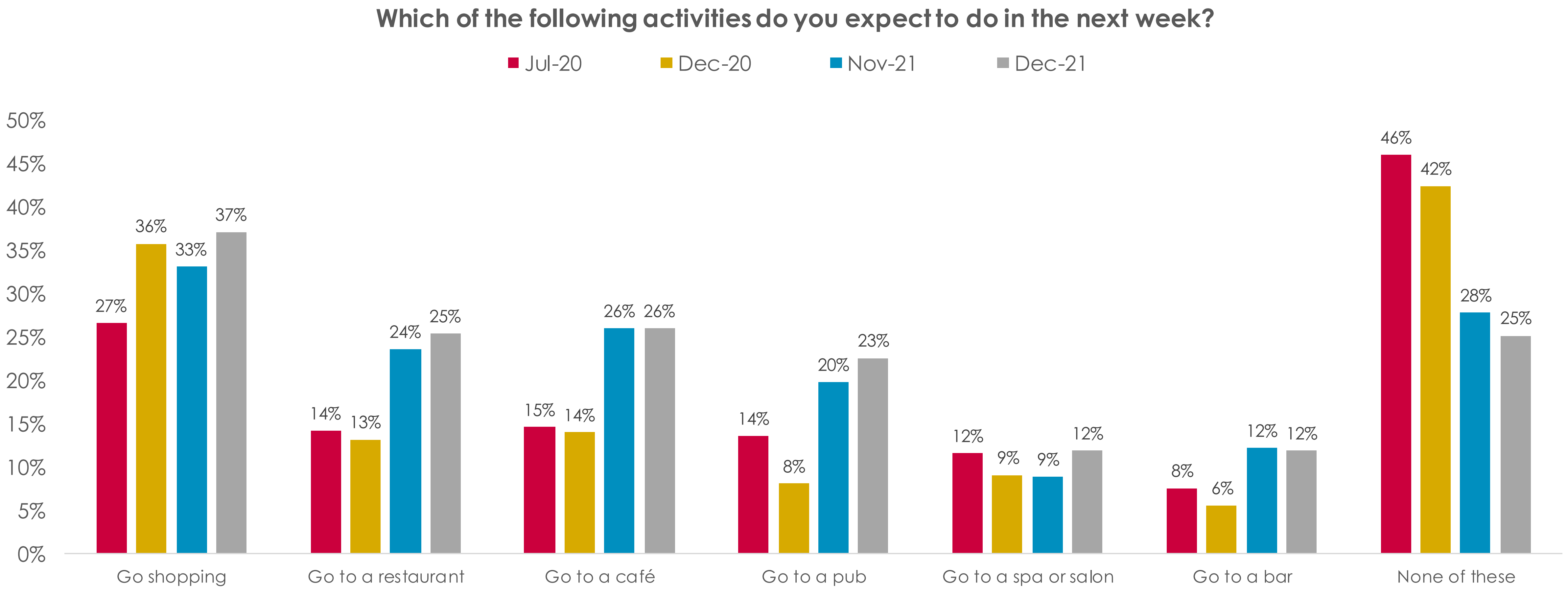
# Price conscious behaviours grow more prevalent amidst financial concerns

- Proportion who have recently begun shopping around for groceries up a further 2% this month – now up 4% compared to average
- Those who have recently begun using the internet for price comparison also up this month (26% to 27%)
- Support for local independent businesses stalls slightly as consumers grow more conscious of price



# Appetite for leisure grows slightly as we approach Christmas

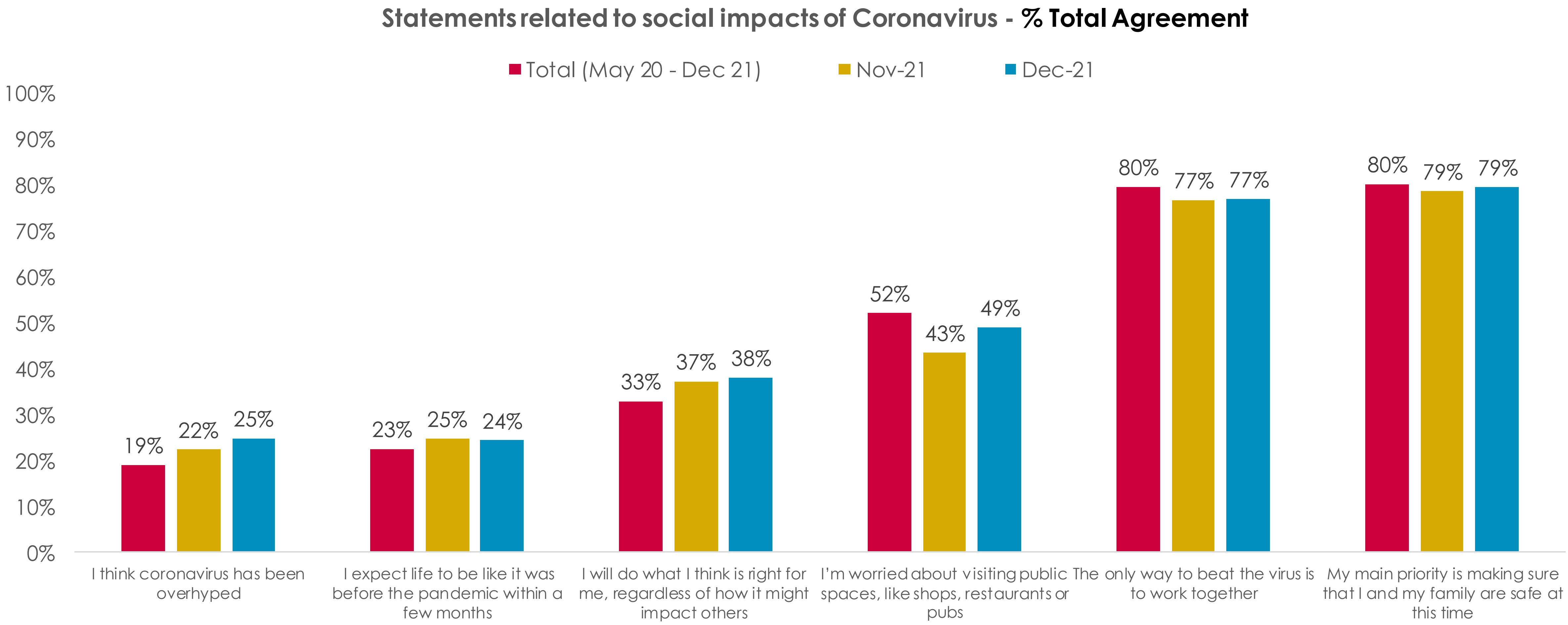
- Proportion expecting to go shopping in the next week up 4% this month (33% to 37%) – but just 1% higher than last year
- Expected attendance to food and drink venues substantially higher in 2021 than it was in December of 2020
- Just one in four (25%) expect not to do any of the listed activities at some point in the next week



# Social Implications

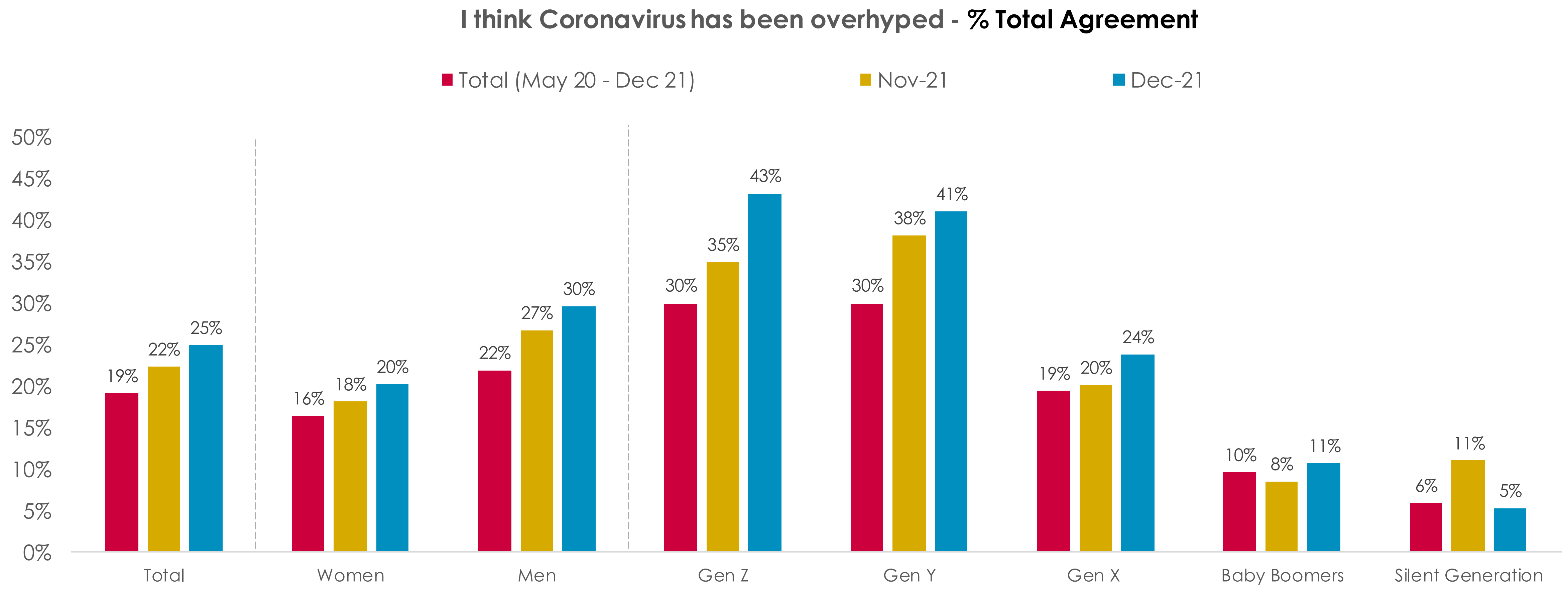
# Rising Omicron cases drive concerns about public spaces

- Proportion worried about visiting public spaces like pubs and restaurants up 6% compared to last month (43% to 49%)
- As MPs discuss potential restrictions, pandemic cynicism has grown – with a 3% rise in those feeling pandemic has been overhyped



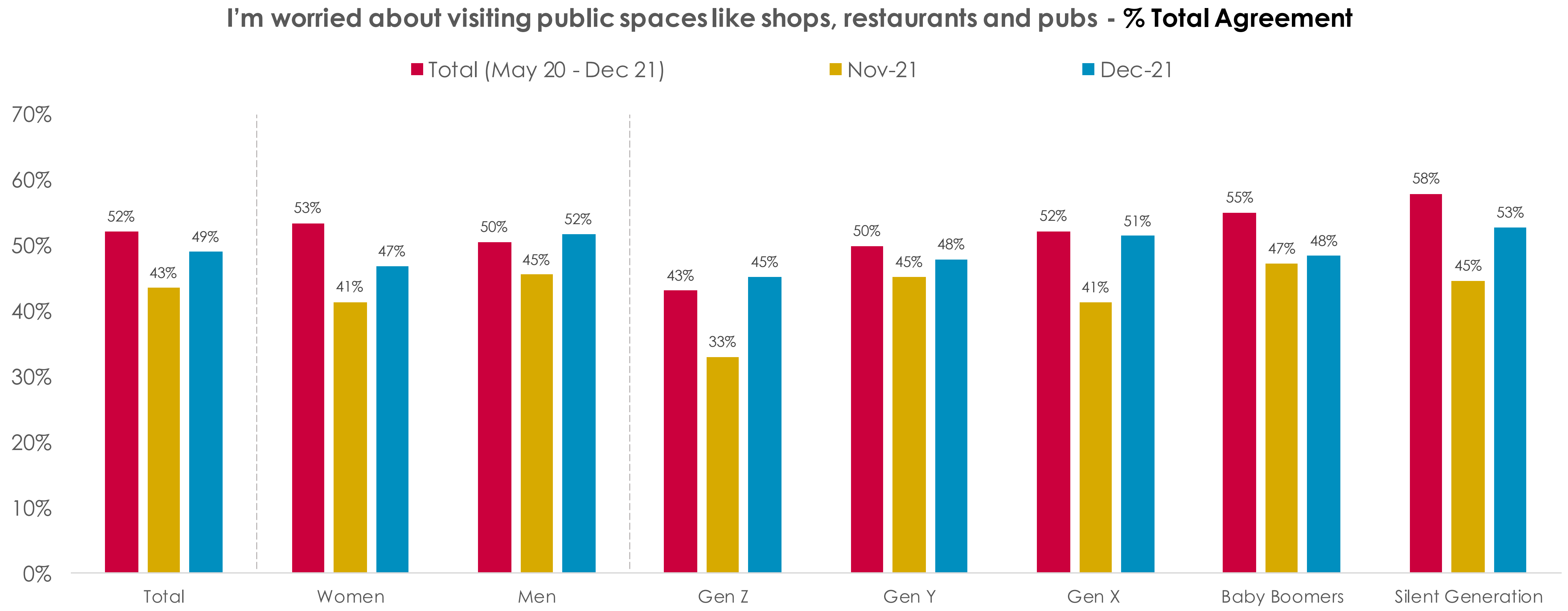
# Gen Z the primary driver of rising pandemic cynicism

- Whilst we see a topline rise of 3%, Gen Z see an increase in cynicism of 8% this month (38% to 41%)
- Gen Y also see just a 3% increase this month but remain significantly more cynical about pandemic than older cohorts
- Men see greater increase in cynicism this month, whilst remaining more likely to adopt a cynical outlook



# Concerns about public spaces remain quite consistent across demographics

- Gen Z actually see sharpest increase in concerns about public spaces this month (33% to 45%) but remain least concerned
- Silent Generation unsurprisingly see a significant rise in concerns this month, up 8% compared to November (45% to 53%)
- Men experience slightly greater rise in concerns about visiting public spaces than women (7% to 6%)

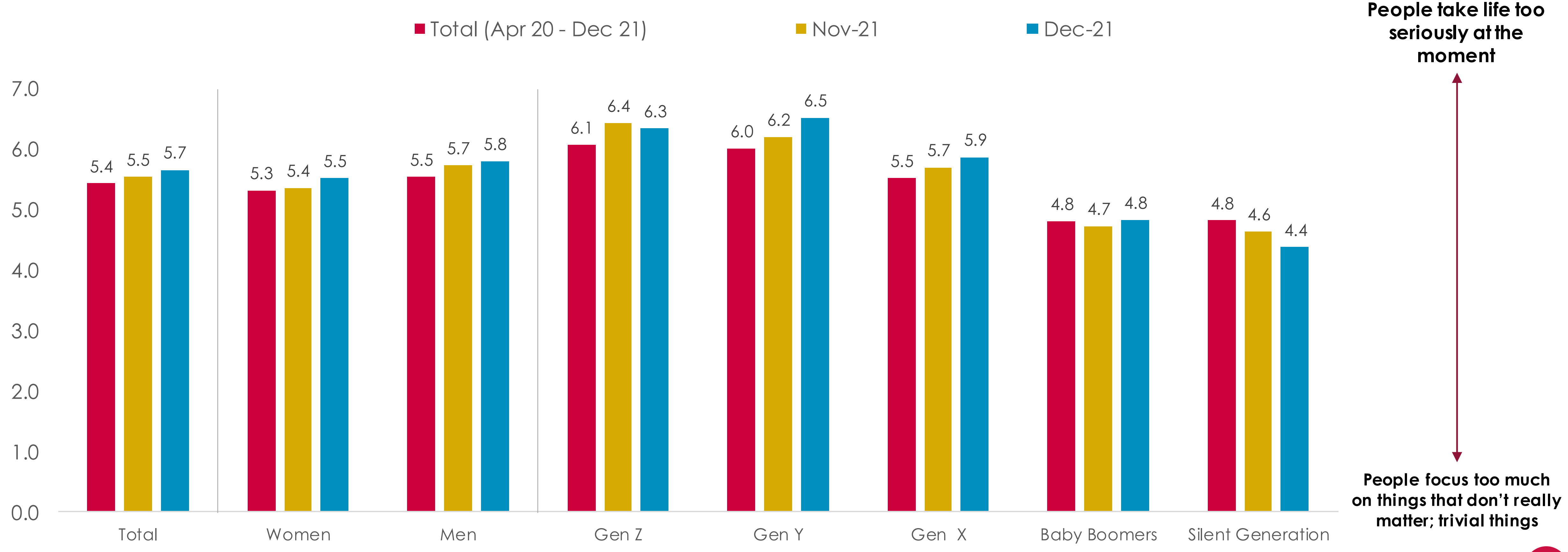


# Generations further polarised by levels of pandemic seriousness

- At a topline level, degree of seriousness actually declined this month despite rising health concerns (5.5 to 5.7)
- This is primarily driven by younger generations, specifically Gen Y (6.2 to 6.5) and Gen X (5.7 to 5.9)
- The Silent Generation however see a 0.2 point decrease this month (4.6 to 4.4) indicating greater seriousness for this group

## On a scale from 1 to 10, please indicate to what extent you feel people take life too seriously

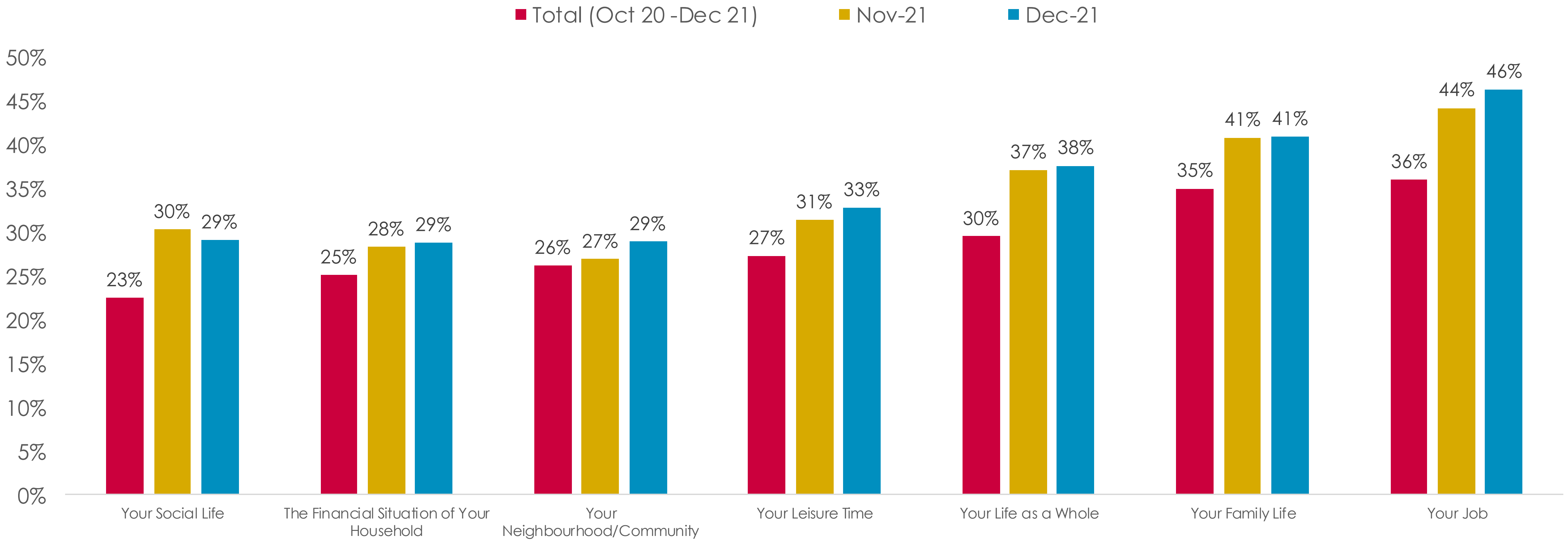
***[Average Response]***



# Consumers more positive about impact of pandemic than in earlier phases

**- Proportion who are more satisfied with their job than compared to pre-pandemic up 2% this month (44% to 46%)**
**- The proportion who are more satisfied with their leisure time also up 2% this month, driving 1% rise in satisfaction with life as a whole**

**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]**

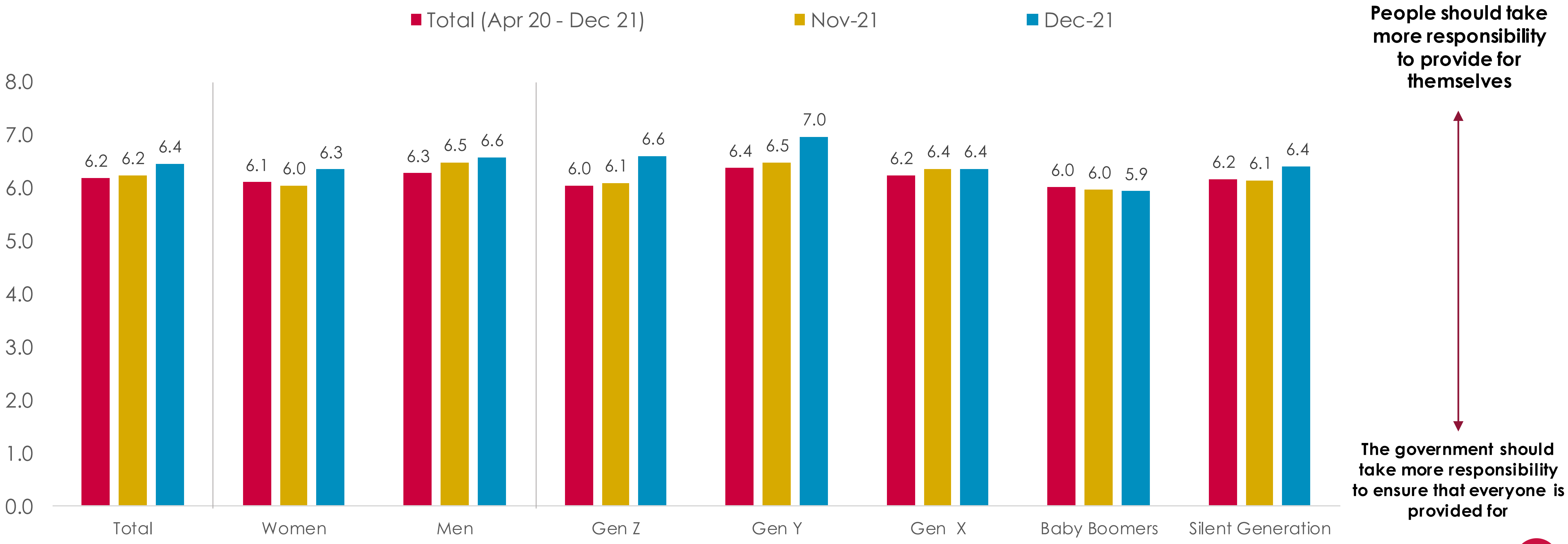


# Priorities

# Community spirit dampened by rise in demand for more personal responsibility

- At a topline level a 0.2 point rise from 6.2 to 6.4 indicates a greater demand for people to take responsibility for themselves
- This trend is more prominent amongst younger generations this month, with both Gen Z and Gen Y seeing a 0.5 point rise

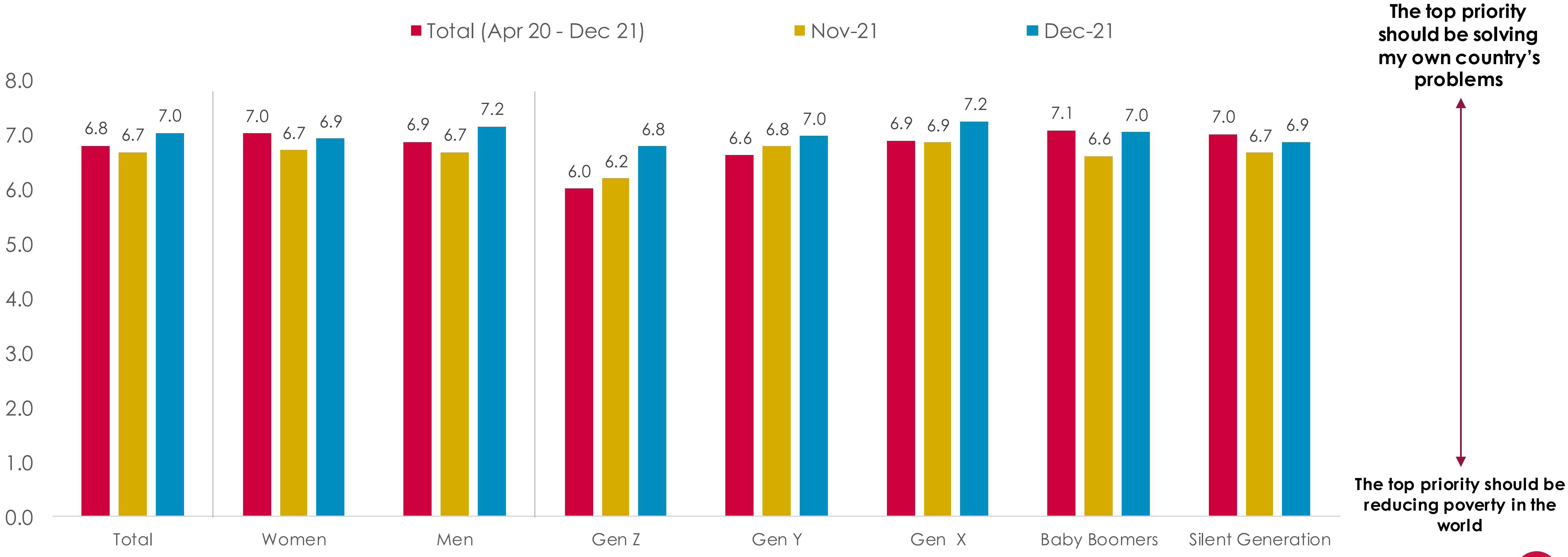
**On a scale from 1 to 10, please indicate to what extent you feel it is the Government's responsibility to ensure everybody is provided for *[Average Response]***



# Rising UK cases drive focus on resolving issues domestically

- Average score rises by 0.3 points this month (6.7 to 7.0) as consumers adopt more caution over rise in UK cases
- This trend is primarily driven by men (6.7 to 7.2) and Gen Z (6.2 to 6.8), although every demographic sees some rise

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



# TRAJECTORY

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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