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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 92 weeks, surveyed over 26,000 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 the most recent results, collected from a nationally representative sample of c.750 respondents in the UK over the Festive Period, between Friday 18th December to Monday 4th January 2020.

Fieldwork dates were 18th Dec – 20th Dec, 24th Dec – 25th Dec, 4th Jan – 6th Jan.

This report also includes qualitative data collected from our online focus group on 4th January, reviewing the festive break and final weeks of 2020.



Summary: This year's Christmas has been different to previous ones, and the nation's mood has dropped with the welcoming of the New Year and New National Lockdown rules

- The New Year, and new Lockdown has had a negative impact on the Nation's happiness, optimism and life satisfaction as happiness and life satisfaction levels are now the lowest that we have tracked so far.
- Changes in advice remains a prominent factor eroding confidence in the government (at 33%) and use of private companies throughout the pandemic has furthered negativity
- Optimism of being able to do activities and go on holidays has dropped after the announcement of Lockdown #3 and researching holidays has declined in the new year (-8ppts), as well as a decline in interest in day trips/weekends away (-7ppts)
- Peak Christmassy feeling was felt in the two weeks before Christmas, but overall the nation felt less festive in 2020 than in 2019 as the COVID pandemic continued to impact people's behaviour during the festive season
- Compared to 2019, Christmas is significantly less likely to be associated with shopping (from 43% down to 35%) and significantly more likely to be associated with love (from 37% up to 46%)
- A fifth of the nation started up new traditions this year that they expect they will continue in the following years, such as Zooming extended family and focusing more on the real meaning of Christmas

Life satisfaction, optimism & consumer confidence



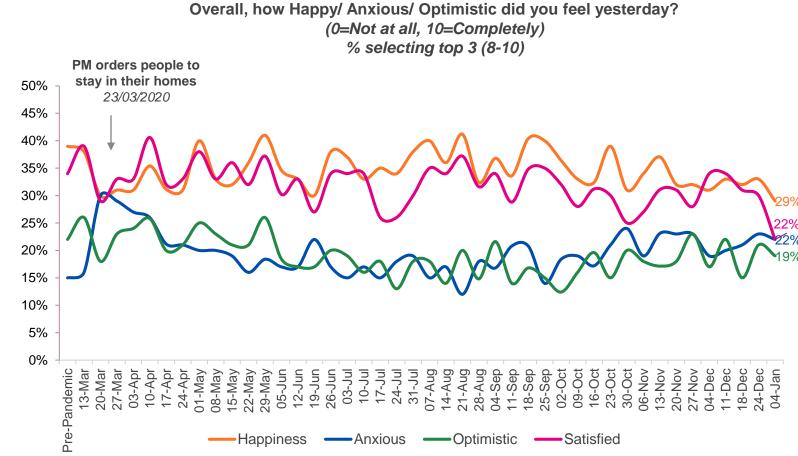
The New Year, and new Lockdown has had a negative impact on the Nation's happiness, optimism and life satisfaction

Happiness levels are now the lowest that we have tracked, at 29%.

Only one in five people are now feeling optimistic about Britain's future.

Life satisfaction is at its lowest point since tracking, dropping 8ppts from 30% to 22%.

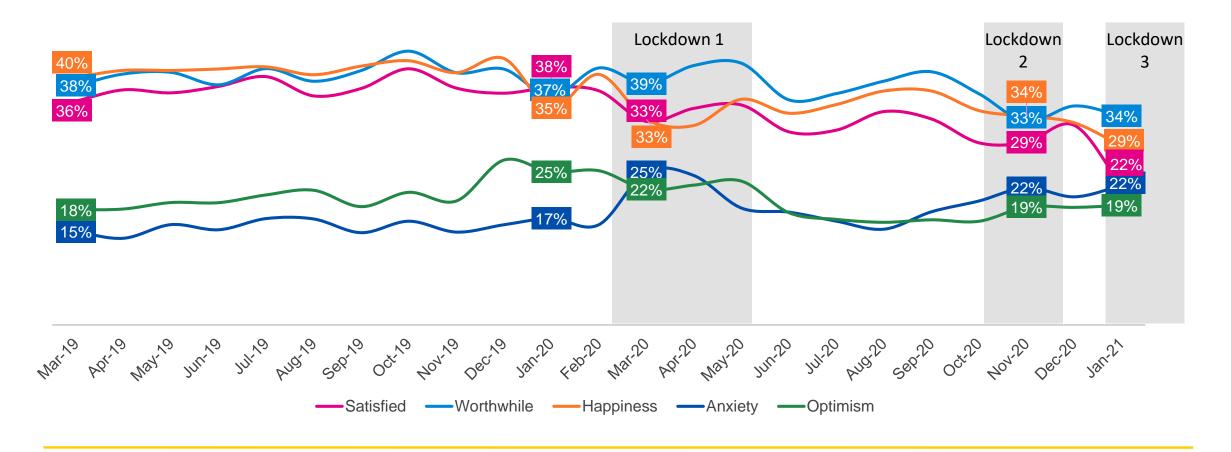
Anxiety levels dropped slightly since Christmas Eve, but remain high at 22%.





Happiness levels are at the lowest now since tracking in March 2019, with anxiety levels now at similar heights as Lockdown #1

The mood of the nation over time



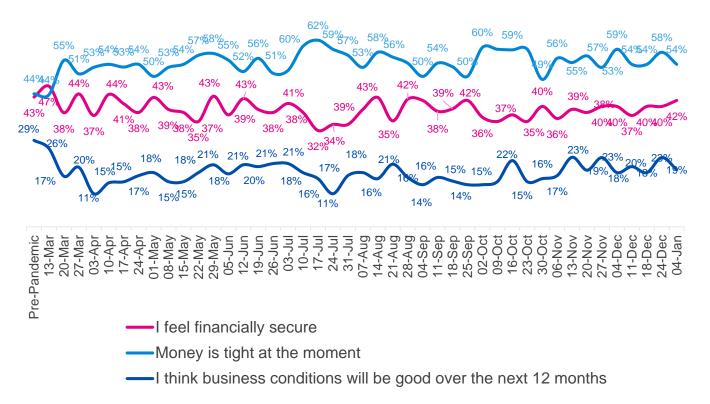
Source: Radar Data March 2019 - January 2021.



Feeling financially secure has increased slightly over the last few weeks, with minor improvements in the proportion of people feeling money is tight

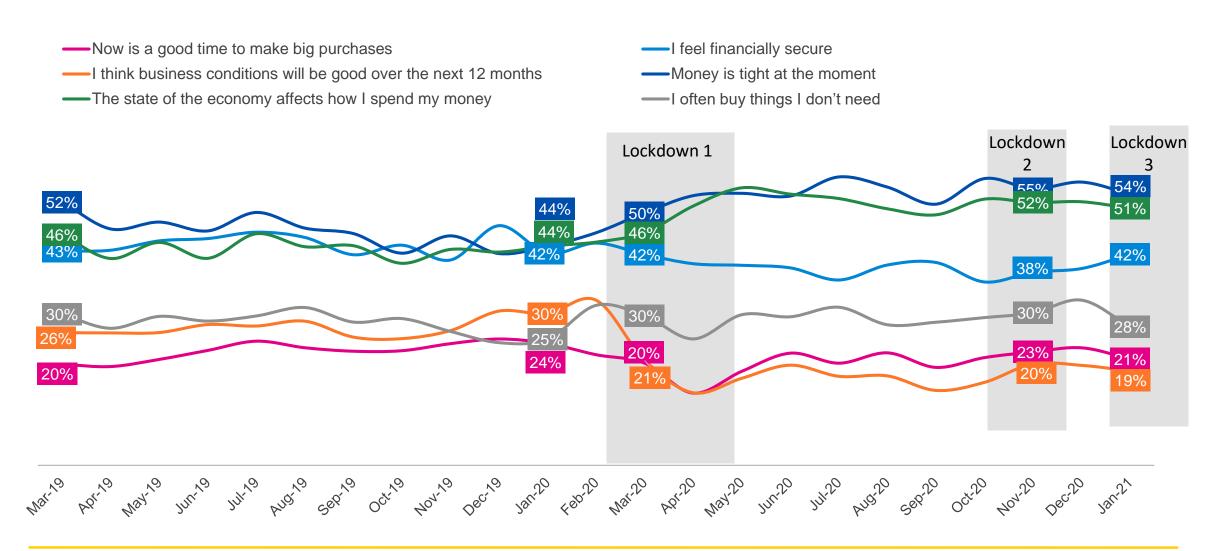
To what extent do you agree with the following statements?
(0=Not at all, 10=Completely)
% selecting top 3 (8-10)

- The percent of people feeling financially secure has increased 2ppts from 40% to 42%
- There has been a 4ppt decrease in the percentage of people reporting that money is tight, from 58% to 54%
- Confidence in future business conditions has dropped this week, from 23% to 19% since Christmas Eve





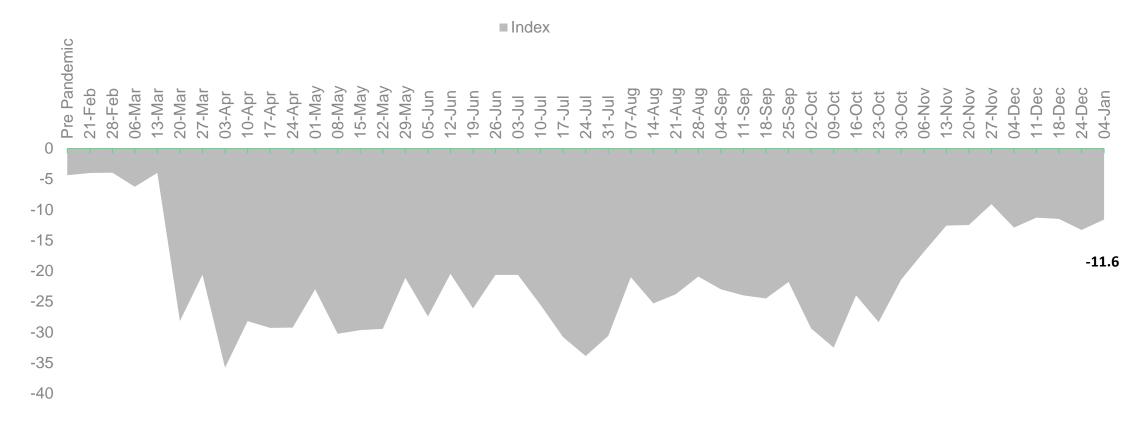
Looking at the monthly scores since 2019, we can see that confidence in future business conditions has not recovered since Lockdown #1



Source: Radar Data March 2019 – January 2021.



Consumer Confidence has remained relatively stable across the festive period, but continues to be low



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 remove 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.



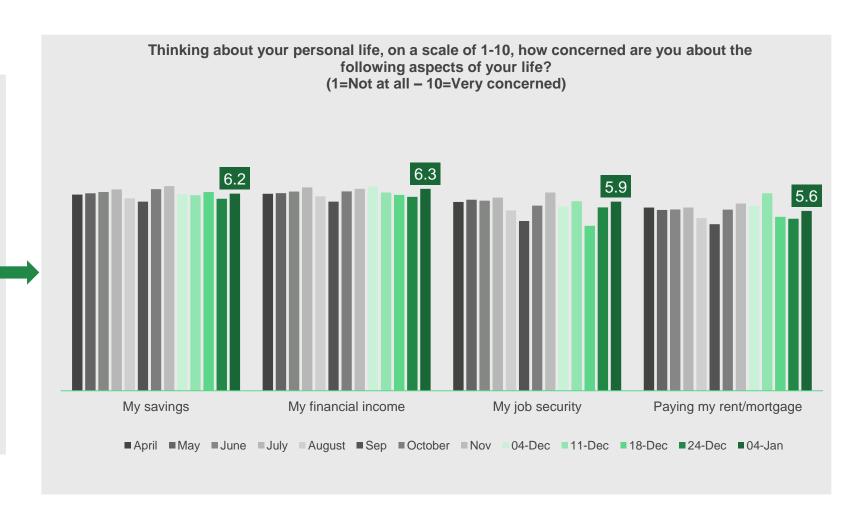
Concerns over financial income has increased slightly this week as we head into the third lockdown

15% of households have someone that has been **furloughed**

9% 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

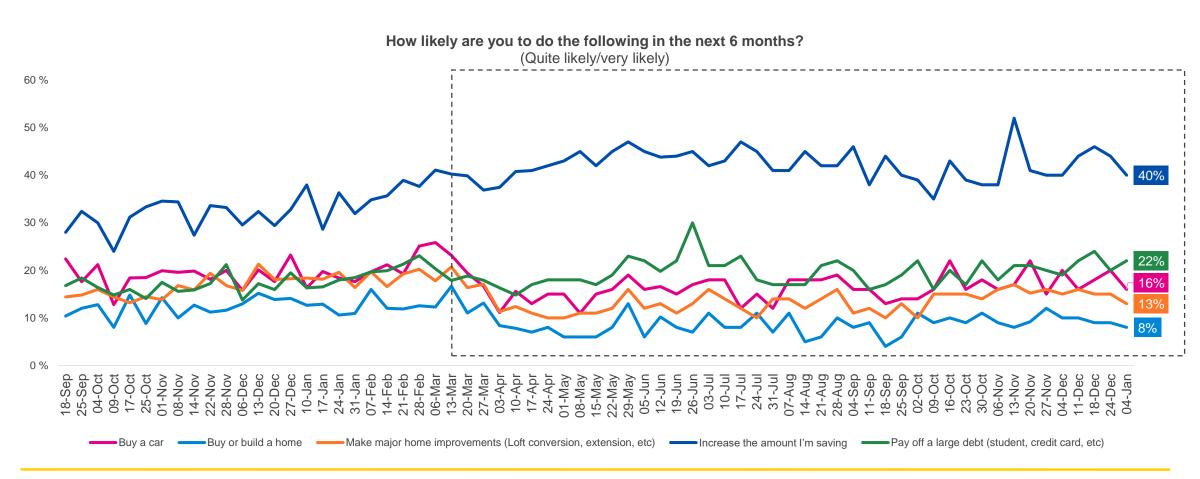
56% say that their employer has been supportive during the COVID-19 outbreak





Plans to increase savings in the next 6 months has declined over the festive period, but still remains higher than the same period last year

Plans to buy or build a home and plans to buy a car have both decreased this week



Confidence in Government & Broad Concerns

Last minute changes to COVID-19 guidelines over Christmas coincided with a dip in confidence in the government

The plan to relax restrictions on social interactions over the Christmas period was criticised in the run up to Christmas and the change to this plan on the 19th Dec created strong disdain for the approach

"The xmas relaxation is more designed to present the government in a popular way than to tackle the problem. Government communications have been chaotic and late."

"Boris seems too scared to do the right thing - reverse Christmas rules"

"He's allowing families to mix over Xmas which is not good. Virus is still about and this is going to up the virus & more pple are going to fall ill."

"They should never have agreed to relax things over Christmas, everybody could see the numbers were going to rise"

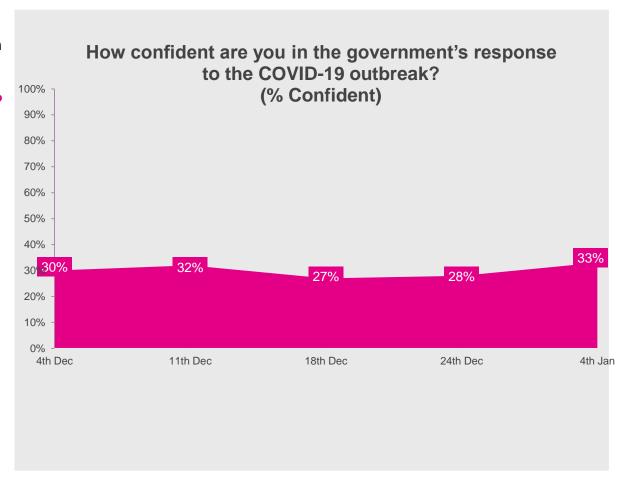
"They keep making outlandish deadlines for things and saying stuff like the rules will get relaxed at Christmas 2 months in advance and then having to make a u-turn as we get closer to it..."

"There has been too many changes in such a short time .We should have been on lock down well before Christmas."

"The government say one thing one week and say nothing is going to change and after people might have made plans based on what the government say a few days later they change everything."

"I and others spent Christmas alone this year due to the government's stupid decisions."

"they should have forgotten Christmas and gone into lockdown earlier"





Changes in advice/policies remains a prominent factor eroding confidence in the government and use of private companies has furthered negativity

Frequent changes to COVID-19 policies and guidelines have been the most prominent concern and have eroded confidence in the government

"U turn after U turn, is a result of them guessing and not looking at long term plan. The message they have been sending out is confusing and contradicts previous messages."

"The government don't seem to have a plan and are too late or wrong on pretty much every decision so far, including making numerous u turns on poor decisions. Completely incompetent."

"It has been pantomime politics since Covid-19 first emerged in Europe - yes we will, no we won't, constant change with decision made in such a delayed manner that they have had little impact."

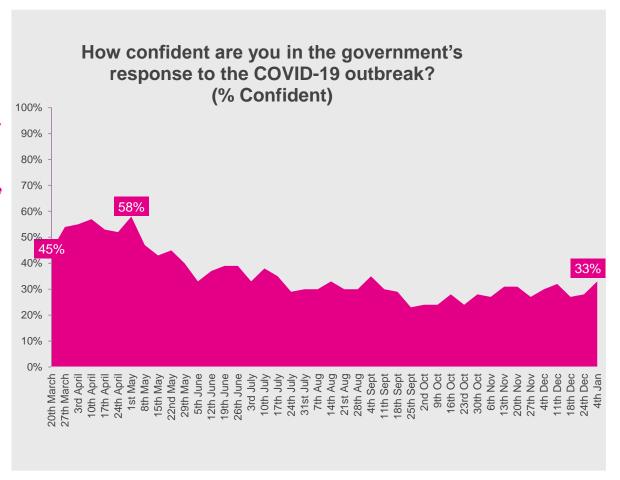
"As the advice keeps changing all the time and it's hard to keep up with the rules and regulations"

There is disdain for the use of private companies in recent government initiatives

"In all cases of doubt always follow the money..... And we can see contracts awarded without due diligence and tender being awarded to personal connections of government ministers"

"Awarding contracts to friends, making acquaintances rich while the ordinary people have to suffer."

"failed at every level except for helping donors and family and friends line there pockets"





There is sympathy for the government, with many blaming those breaching government policies, and the vaccine rollout is giving cause for optimism

Contempt for people not adhering to COVID-19 guidelines remains prominent and there is a perception that the government are not adequately punishing those breaching guidelines

"Doesn't help that a minority of idiots don't believe the rules apply to them and also that people deliberately trying to find loop holes when the advice is relatively straight forward."

"It's not the government that have caused the problems it's the general public"

"the government are doing all they can to help prevent the covid. You get idiots that do not believe in it so cause mayhem"

"I think they are mostly doing okay under the circumstances. Half the restrictions wouldn't have been necessary if people had behaved responsibility. You can make all the rules you like, but if people don't follow them, it's an upward battle."

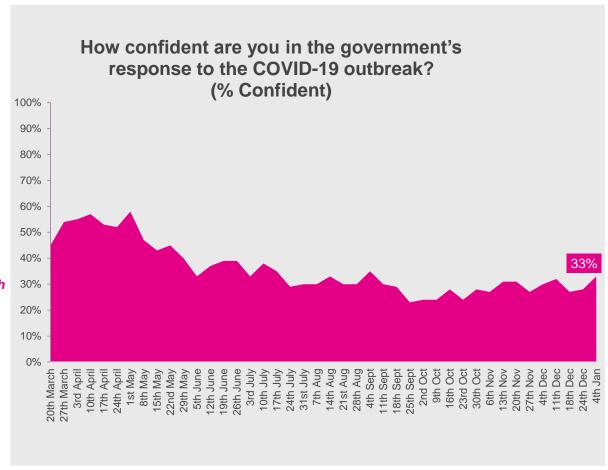
"Did not use the Police or army to ensure everybody was 100% co-operative. Did not punish those that broke the rules."

The rollout of COVID-19 vaccinations has aided renewed confidence in the government and improved optimism

"With the start of the vaccine I am happier now progress can be made to start getting back to normal"

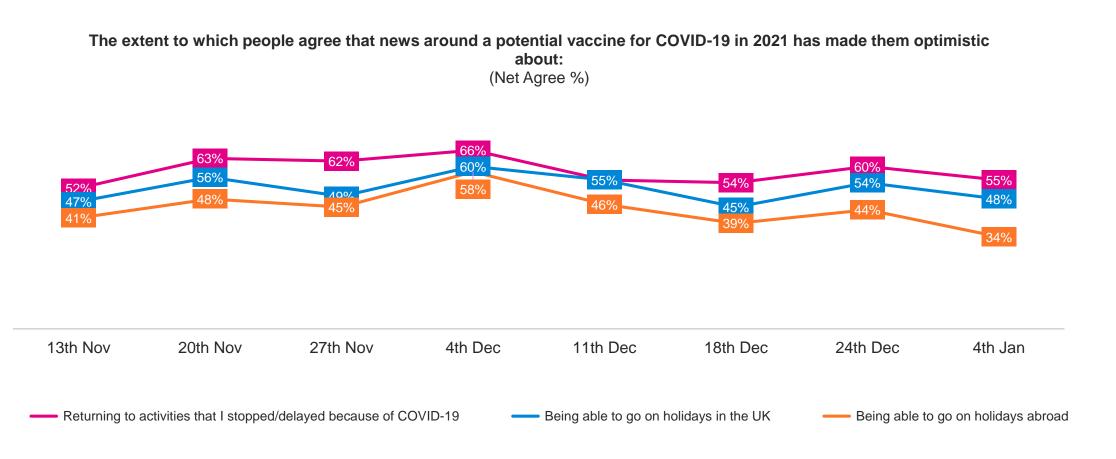
"we can see the light at the end of the tunnel, but people still have to do their bit"

"I think the effort to produce and deliver vaccines has been outstanding."





Optimism of being able to do activities and go on UK & abroad holidays has dropped this week after the announcement of Lockdown #3

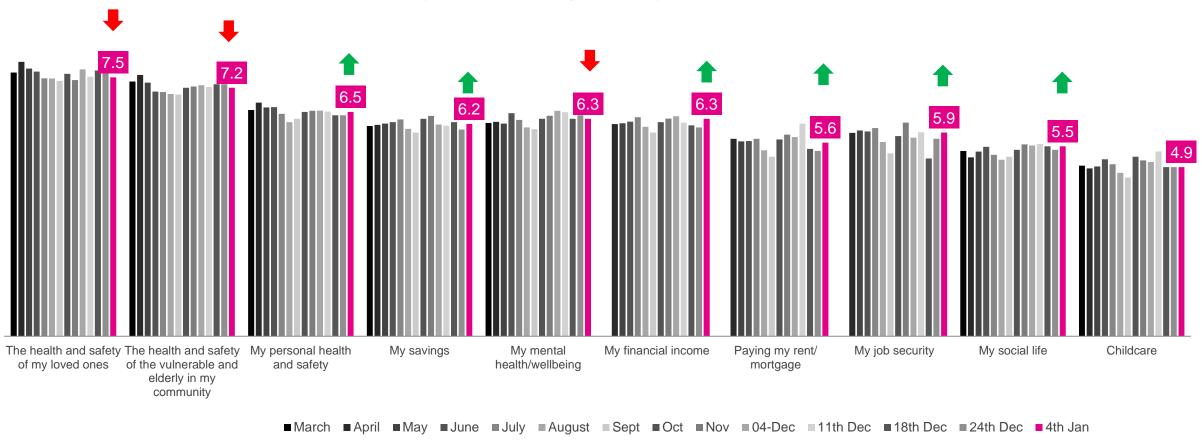




Concerns around job security have increased over the last couple of weeks, along with financial income and savings seeing a slight increase this week

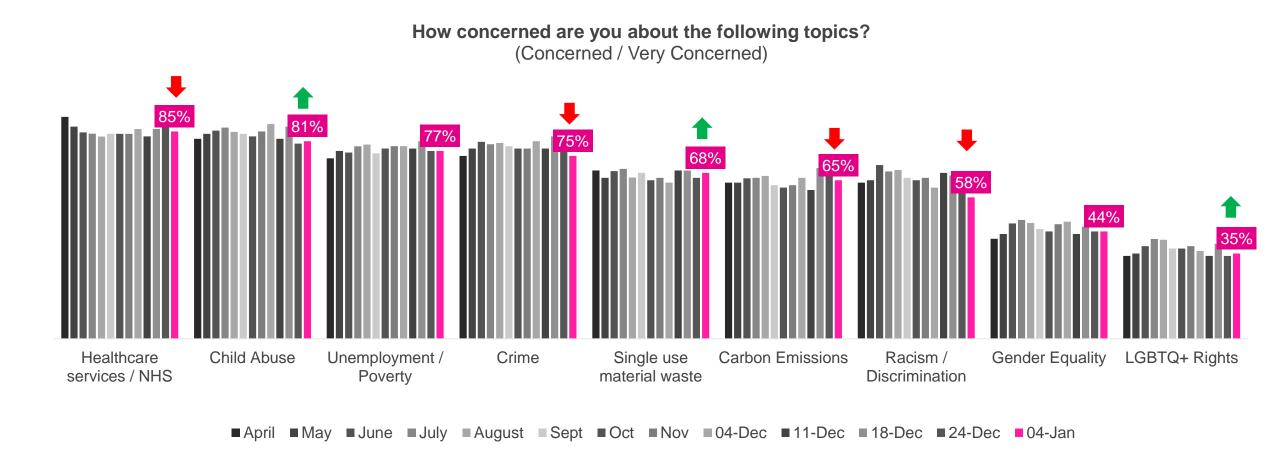
Thinking about your personal life, on a scale of 1-10, how concerned are you about the following aspects of your life?

(1=Not at all – 10=Very concerned)





The nation's main concern coming into the New Year continues to be the Healthcare services and NHS



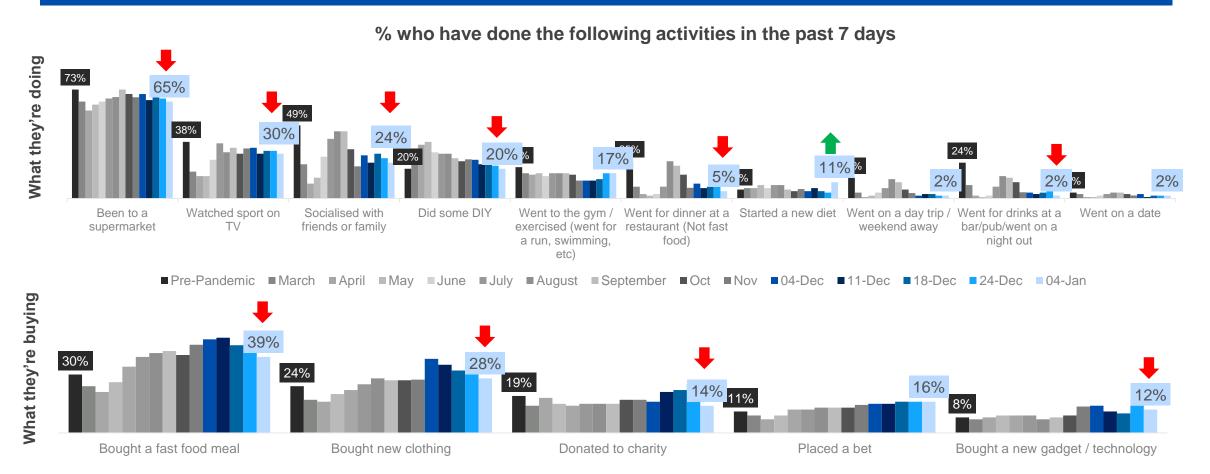


Changes in Behaviour



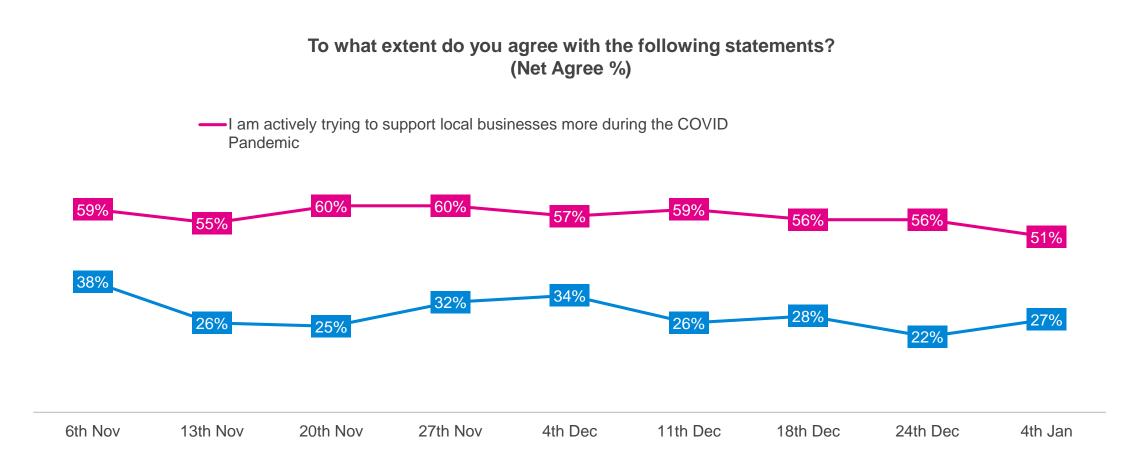
As we enter the new year, those starting new diets has surged from 4% to 11%, and buying a fast food meal has dropped 9ppts since early December

Charitable contributions experienced a rise in the run up to Christmas but have returned to below pre-pandemic levels in the new year





Fewer people are reporting to be actively trying to support local businesses

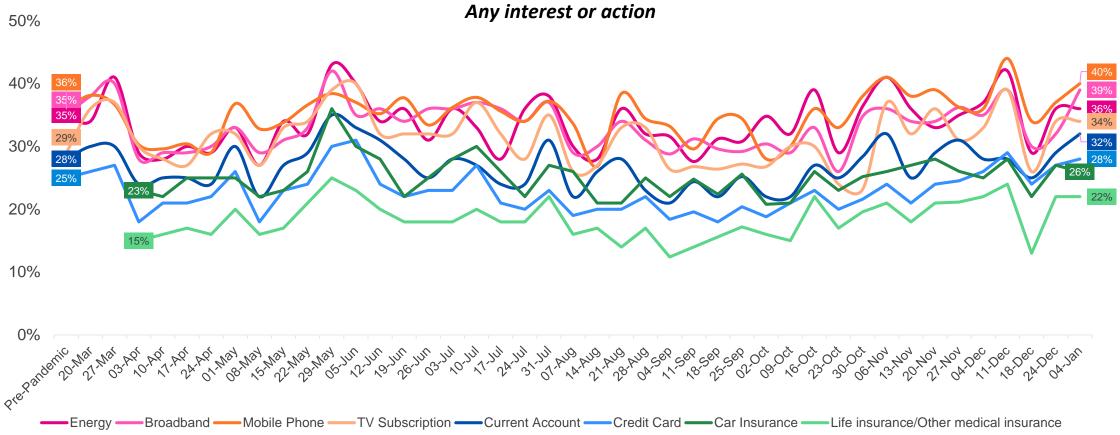




Interest in switching subscriptions or services has increased for mobile phones, almost matching that of its highest amount on 11th Dec

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

Any interest or action

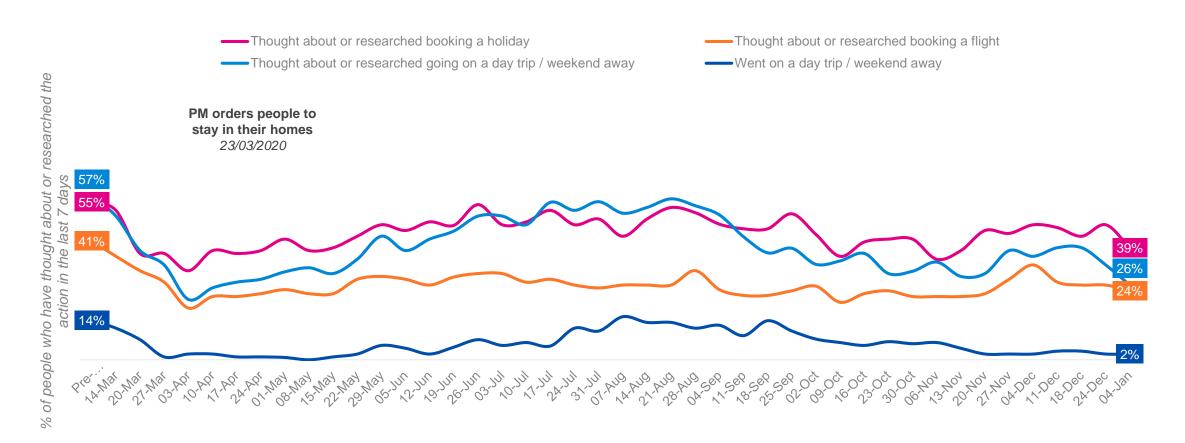




Researching holidays has declined in the new year (-8ppts), as well as a decline in interest in day trips/weekends away (-7ppts)

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



Festive Insights 2020



OMD's Predictions for Christmas 2020

In June this year we set out some predictions for what the festive period would look like, based on Insights gathered from our 2019 Cracking Christmas research through the lens of a pandemic



We split our predictions up into two areas:

- 1. What we thought would **stay the same** as the 2019 festive period.
- 2. What we thought **may change**, due to the impact of the Coronavirus.

The insights were based on weekly Radar data which covered 29th November 2019 - 3rd January 2020.

For this Radar report, we have revisited the predictions that we made in June to test whether our hypotheses were correct.



OMD's Predictions for Christmas 2020

What will likely stay the Same

The same people will take the brunt of hosting, but there will be fewer people around the table

Spending time with family will continue to make Christmas feel special, with grandparents being cherished even more this year

Upgrading and adding variety will continue to be part of a grocery shopping tradition as per 2019

What will likely change for 2020

Fewer people travelling, with 2020 becoming the year for starting new traditions

2020 seeing us appreciating and adopting a new perspective

A shift onto online shopping over in-store

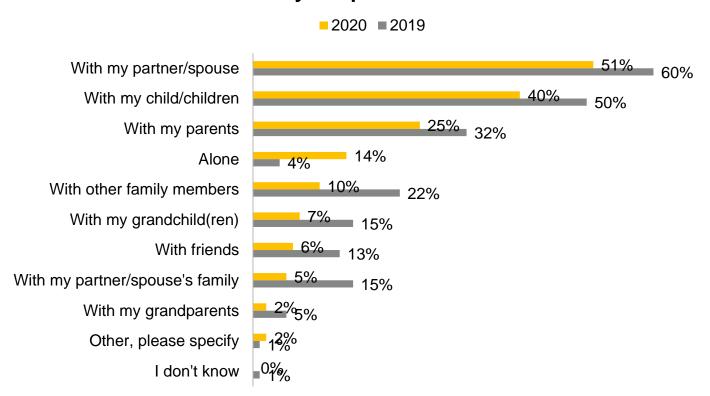
Christmas could be an even bigger bonanza, with more people spending on groceries and presents



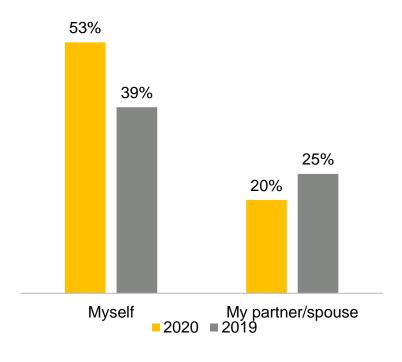
With fewer people coming together to celebrate Christmas this year, more people took on the role as "host" compared to last year

Those spending Christmas alone increased from 4% in 2019 to 14% in 2020, a huge increase of 10ppts

With whom did you spend Christmas in 2020?



Who hosted Christmas in 2020?



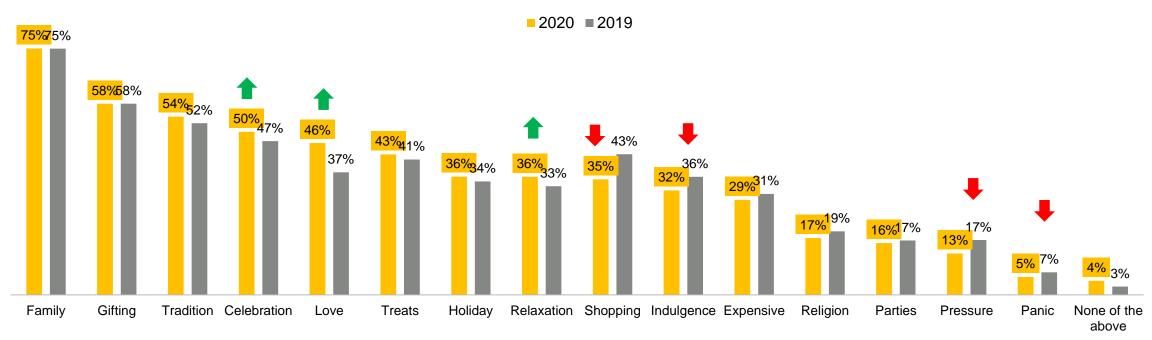


Despite spending Christmas with fewer people this year, Christmas continues to be synonymous with Family

Compared to 2019, Christmas is significantly less likely to be associated with shopping and significantly more likely to be associated with Love

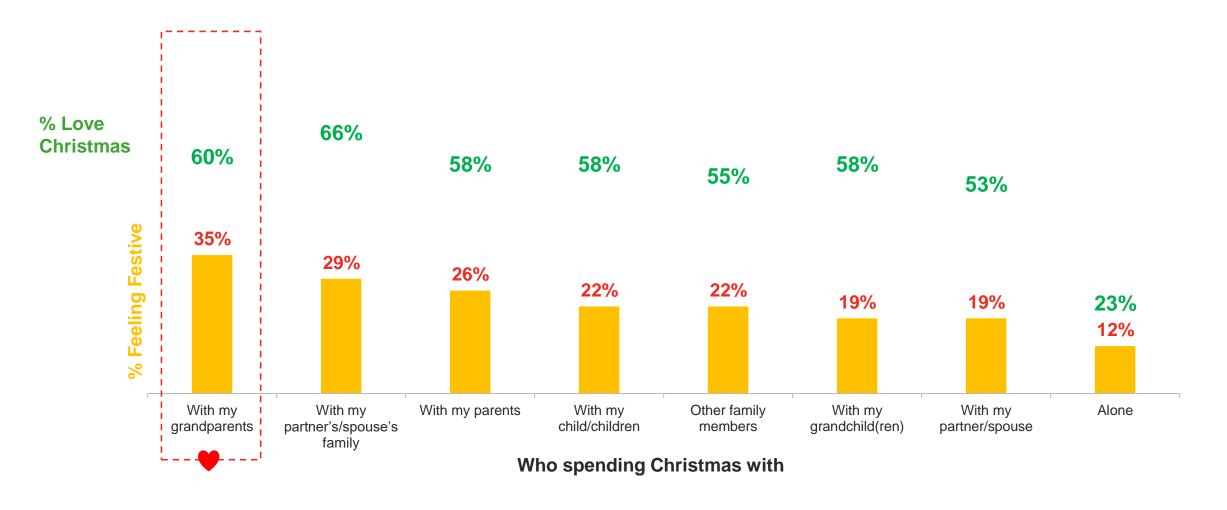
What does Christmas mean to you?

Please select all that apply.





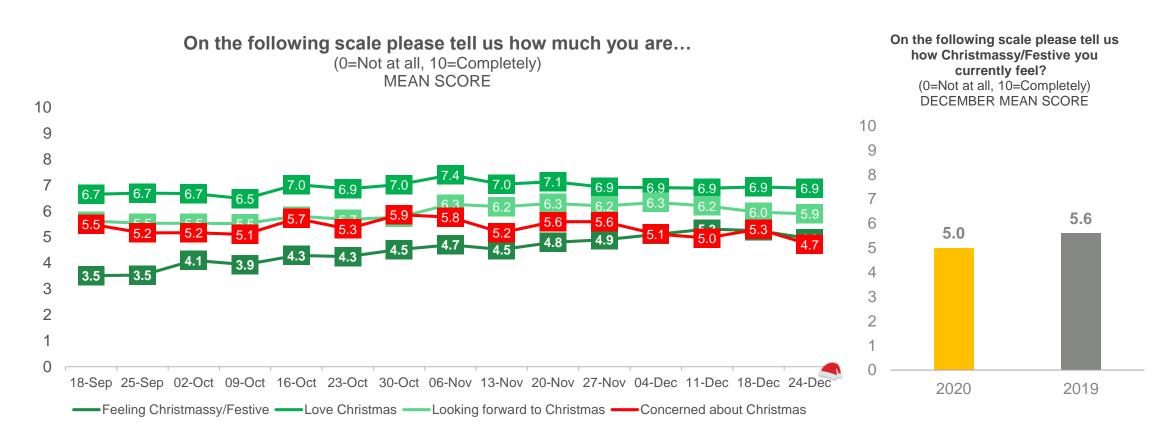
Grandparents continue to make the season even more special, with people feeling most festive when spending Christmas with them





Peak Christmassy/Festive feeling was experienced in the two weeks before Christmas but the nation felt less festive in 2020 than in 2019

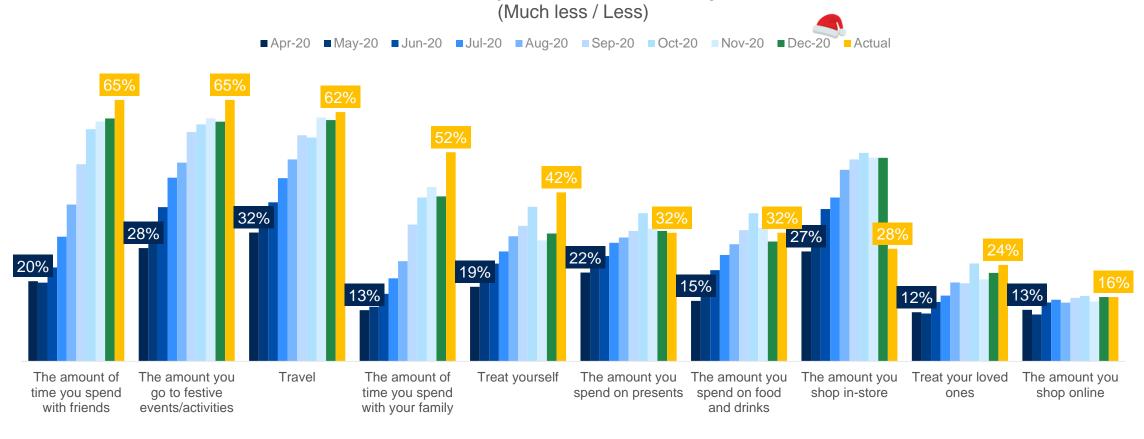
The extent to which people love or hate Christmas and the extent to which they are looking forward to Christmas has plateaued, with minimal change in the last 5 weeks





As months went on, and we went through several lockdowns, expectations of doing fewer Christmas activities, and spending less time with family increased

Thinking about Christmas 2020, do you think you have done/will do more or less of the following actions compared to Christmas last year?

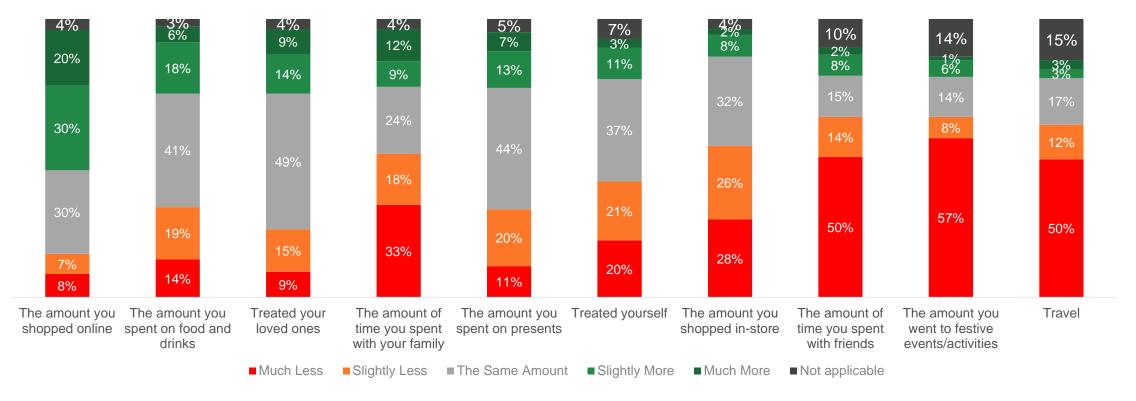




Reflecting on the festive period this year, half of the nation shopped more online, and half spent less time with family

Many predicted these changes in the lead up to Christmas, but time spent with family was even lower than expected (-10ppts). Spending on food and drink was split, with a third having spent less on food and drinks, and a quarter reporting to have spent more.

Reflecting on Christmas 2020, do you think you did more or less of the following actions compared to Christmas 2019?



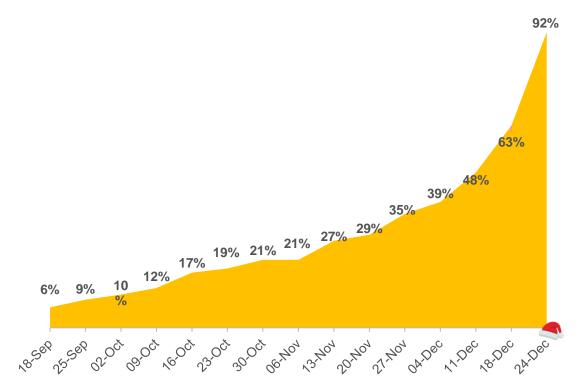
Source: OMD Radar Survey. 04/01: 250

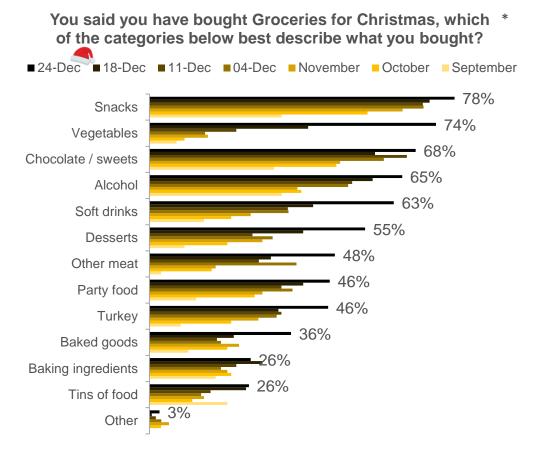


The week between the 18th December and 24th December saw the biggest surge in grocery shopping

2 in 3 of those who have bought Christmas groceries have purchased chocolate/sweets





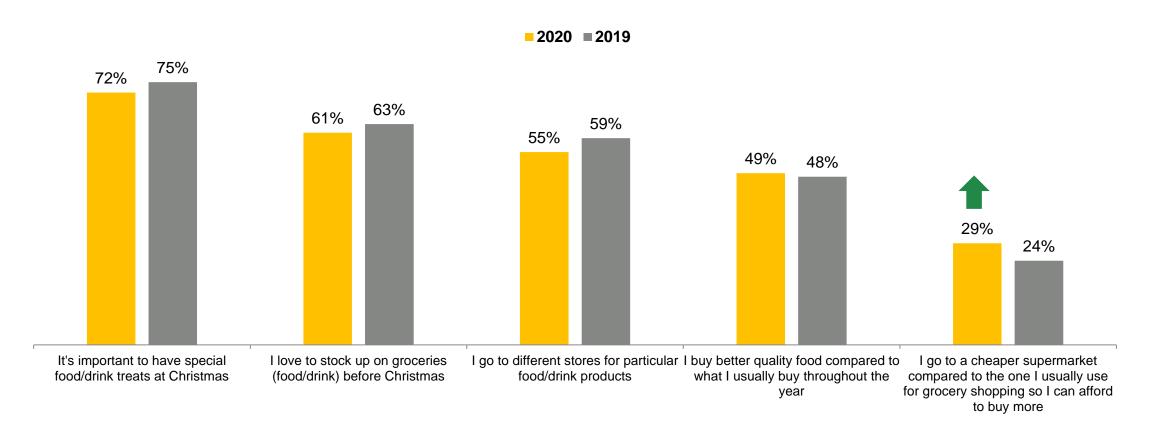




Special food is still very much a grocery tradition, as well as half the nation buying better quality food compared to the rest of the year

To what extent do you agree with the following statements about festive/Christmas grocery shopping?

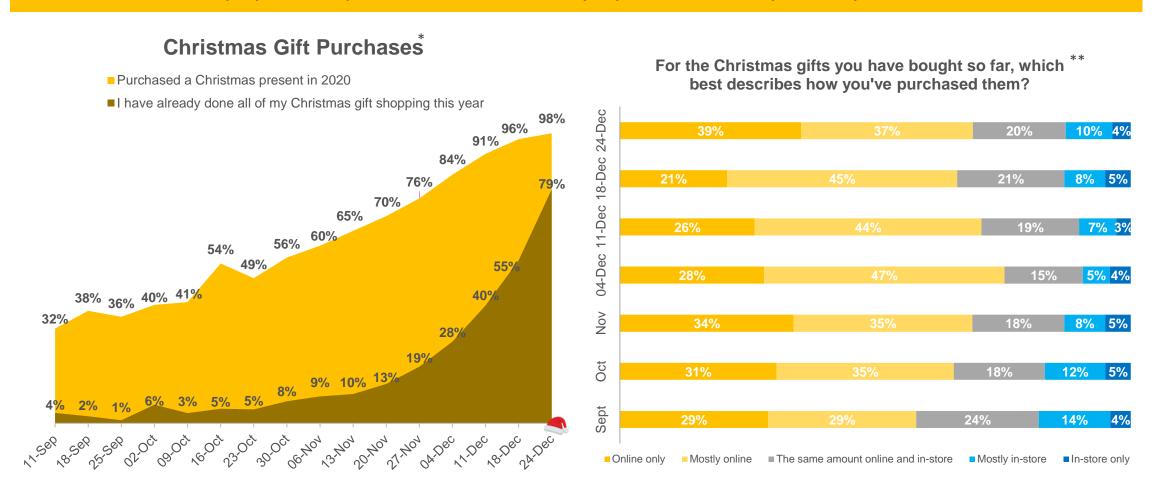
(Completely Agree / Tend to Agree)





Over half of Brits had finished their Christmas shopping by 18th December in 2020

2 in 5 people said they had used online methods only to purchase Christmas presents by Christmas Eve



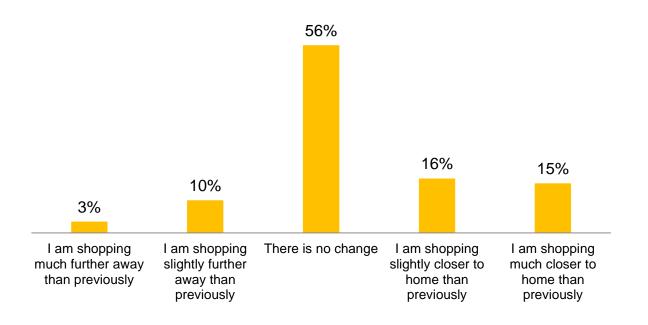


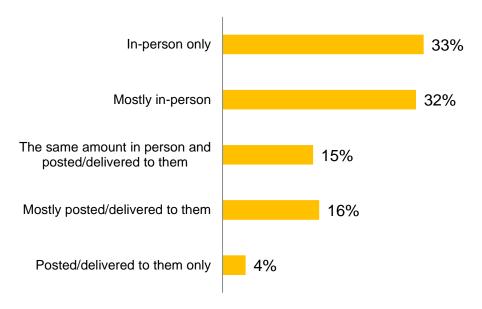
Most people haven't changed how far they travel to buy their presents, and 65% say they mostly or only exchanged presents in person

Around a third of the nation said that they have shopped closer to home than previously this year

Thinking about Christmas gifts that you have bought in-store, how far have you travelled compared to your Christmas gift shopping last year?

For the Christmas gifts that you bought for Christmas 2020, which best describes how you are giving them to the recipient(s)?

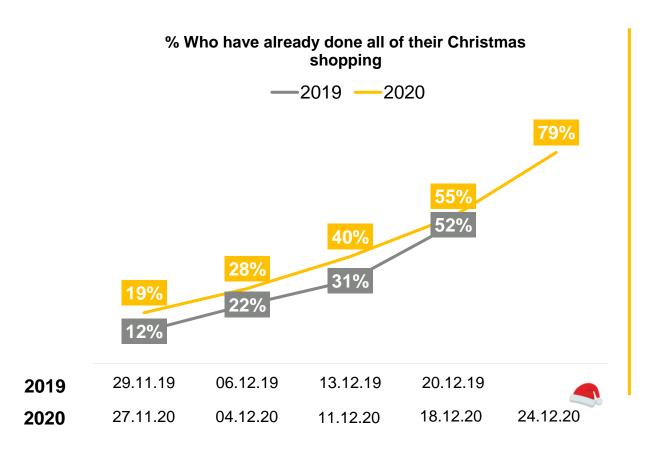


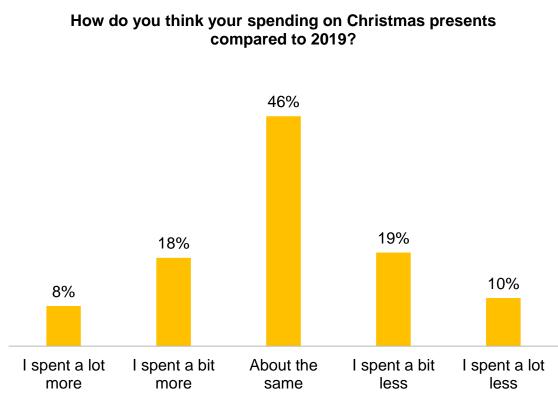




Christmas shopping in 2020 picked up slightly earlier than 2019, but the amount spent remained relatively similar

Over 50% more people had finished their Christmas shopping by late November compared to 2019



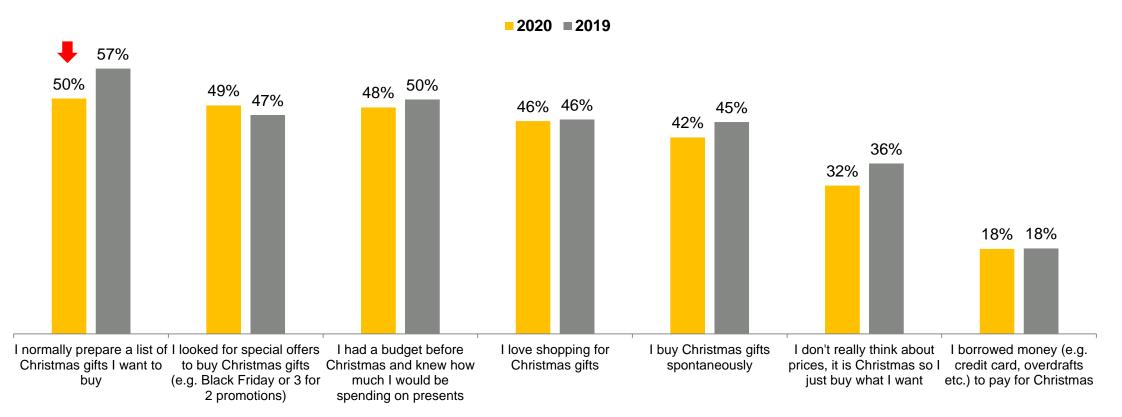




Attitudes to Christmas gifting were relatively unchanged from 2019, with many people preparing lists, searching out for special offers and setting budgets

To what extent do you agree with the following statements about Christmas gifting?

(Completely Agree / Tend to Agree)

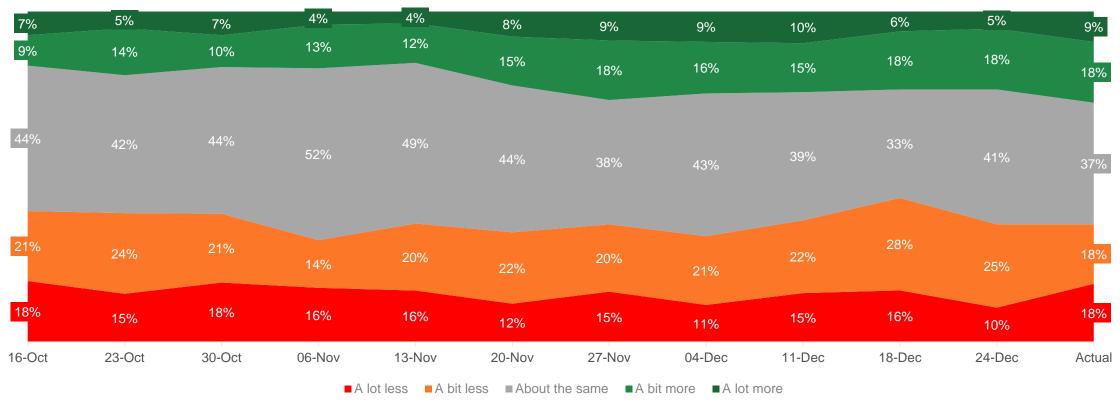




Christmas spending was split, with 36% of people claim to have spent less on Christmas overall in 2020 than in 2019 and 27% claiming to have spent more

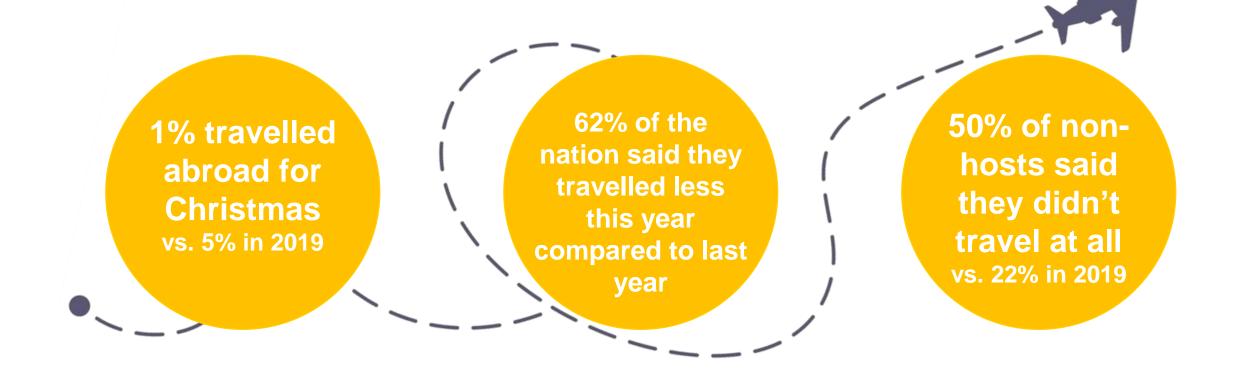
Many predicted spending less in the lead up to Christmas but expectations to spend more began to increase in mid-November and remained constant. Overall, 27% of people spent more on Christmas 2020 than Christmas 2019







Unsurprisingly, travelling was halted this year with fewer people spending Christmas away from home

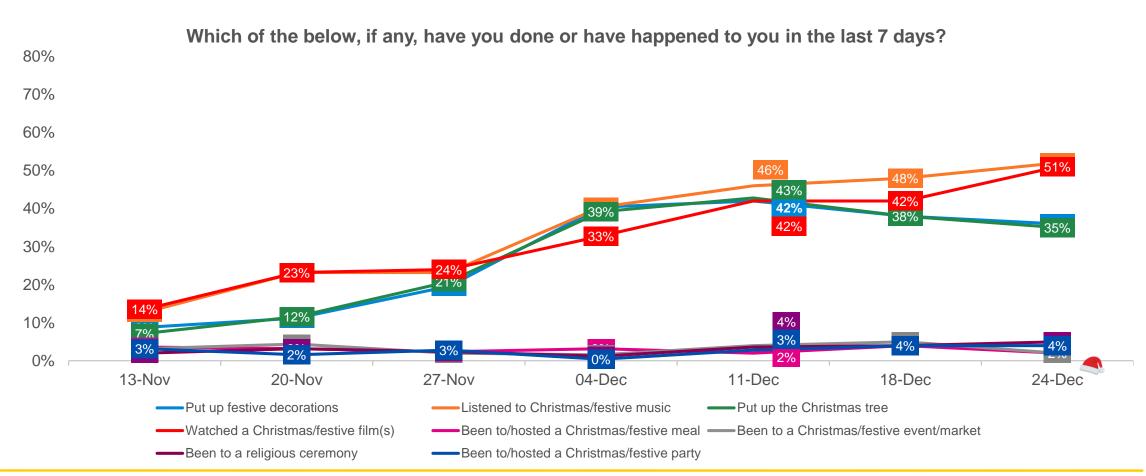


Base: Non-hosts spending Christmas with family (1040)



Half of the nation were engaging in Christmas content in the week prior to Christmas Day

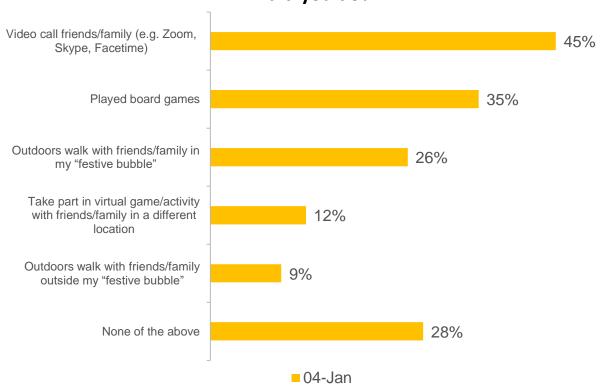






Nearly half report making video calls with family over the festive period

Over the festive period, which of the following, if any, did you do?



"As most of us are in tier 4 now, my most favourite part was watching the kids open their presents whilst having a FaceTime with our parents so they did not miss the big day" M, 35-44

"We used video calling to see family and even though it was nowhere near the same as real life, it was still nice to be able to see everyone and see what they were all doing for Christmas at home" F, 18-34

"We adapted by having a huge lie in on Christmas day.. we visited my mum (in my bubble) and doorstep visit off others, with zoom calls to other family" F, 25-34



1 in 5 people found new ways of celebrating Christmas that could outlast the pandemic - online games and low key parties

21% did festive/Christmas activities for the first time that they think they will do again in 2021. Some activities that people undertook in Christmas 2020 could outlast the pandemic, as people spoke of enjoying a more low-ley affair and focusing on what is most important during this festive time

You said that you did festive/Christmas activities for the first time that you think you will do again in 2021 or that might become a new tradition. Can you tell us what they were?

Zoom/online activities with extended fam

"Face timing relatives (Offspring plus their wives and children) was a lot less stressful than having them in our house"

"Zoom quiz's and going for a walk"

"I had an online New Year's Eve party via video chat with my extended family, it's probably something we would never have done previously but it meant we all got to see each other no matter what the distance"

Low key Christmases

"Have more **intimate** parties"

"We adapted by having **a low key affair** and having facetime with friends and relatives."

"Not having to go to so many parties"

"It was different this year as we normally go to my partners brothers house.. and everyone else's. His dads, his mums, his grandads.. so actually it was heaven not having to do that"

Change in focus

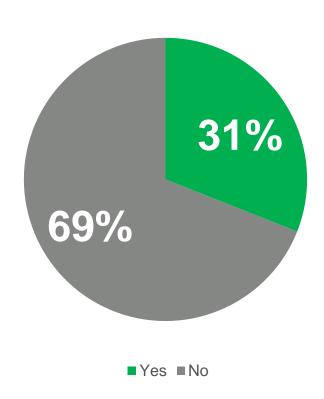
"Say what we were **grateful** for"

"What was different this year is that we focused less on presents and more on been together, there was less food, less presents but more smiles because we were together"

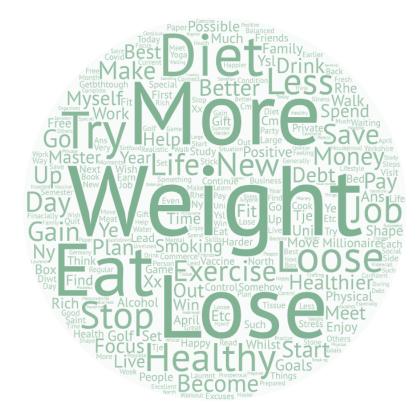


Around a third of us make New Year Resolutions, the most commons ones being around improving appearances

Have you set yourself any New Year's Resolutions for 2021?



You said that you have you set yourself any New Year's Resolutions for 2021. Can you tell us what they are?

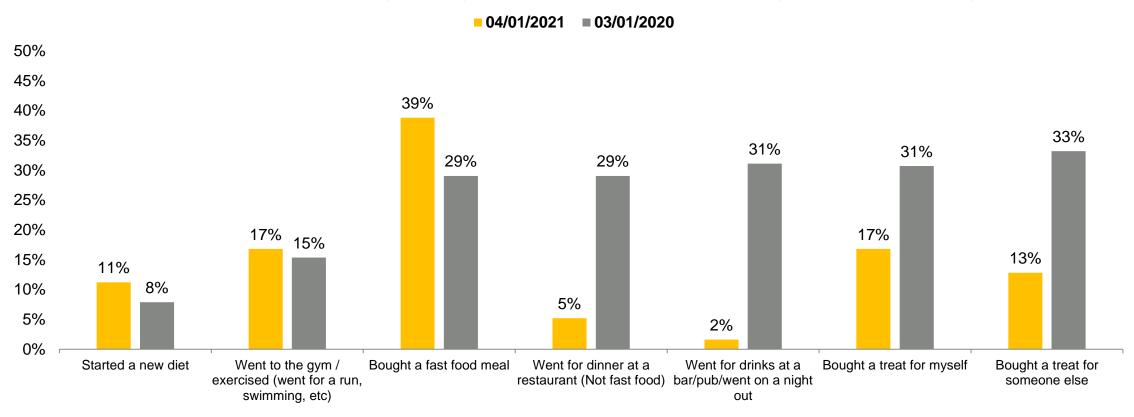




Health-conscious activities are higher at the start of 2021 than 2020 and fewer people are indulging on treats

Despite gyms and sports centres being closed in many places around the country at the start of 2021, more people exercised at the turn of the year in 2021 than in 2020. However, with restaurants, bars and pubs closed, more people are buying fast food than in 2020

Which of the below, if any, have you done or have happened to you in the last 7 days?





OMD's Predictions for Christmas 2020 – How did we do?

What will likely stay the Same

The same people will take the brunt of hosting, but there will be fewer people around the table



Spending time with family will continue to make Christmas feel special, with grandparents being cherished even more this year



Upgrading and adding variety will continue to be part of a grocery shopping tradition as per 2019

What will likely change for 2020

Fewer people travelling, with 2020 becoming the year for starting new traditions



2020 seeing us appreciating and adopting a new perspective



A shift onto online shopping over in-store



Christmas could be an even bigger bonanza, with more people spending on groceries and presents





Appendix



