What people think, feel and do
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# Brand marketing in a crisis:

# How to give consumers a very merry Christmas

8 December 2020

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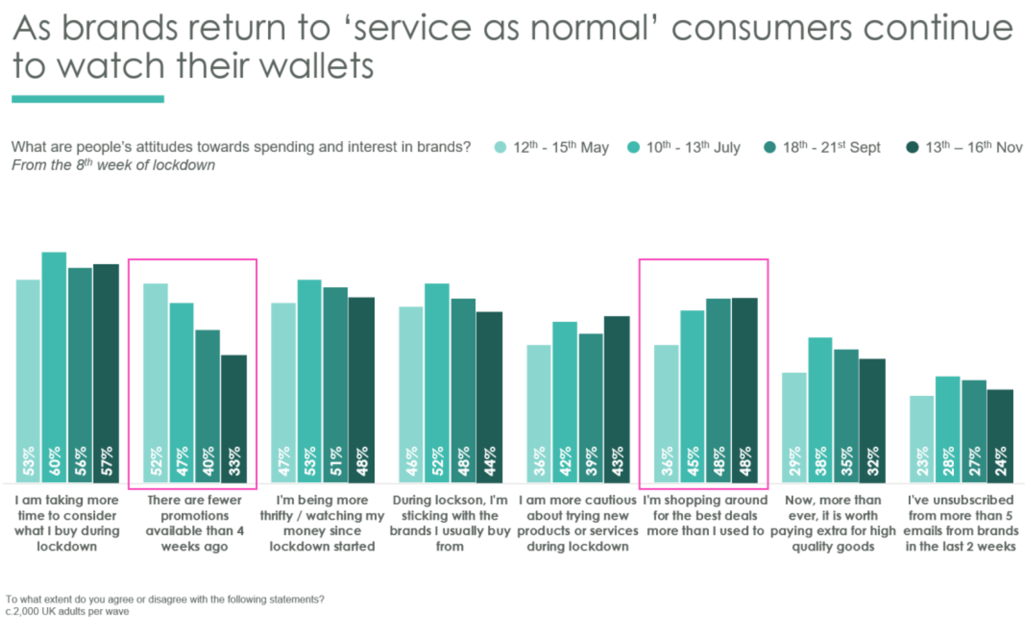
## 'Twas now less three weeks before Christmas…

And the uncertainty surrounding the festive period has not abated.

The public still feel anxious (48%) over relaxed (40%) about 2021, however anxiety is down 7 percentage points from before the second lockdown (55% in September). Optimism (54%) is also up over the same period (46%). Meanwhile people feel ready to jump head-first into 2021, with eagerness rising to 51% (41% in September).

Yet, with nearly a quarter of the UK population (24%) stating that their disposable incomes have, on average, decreased by 35% compared to this time last year, deliberation over purchasing remains high, with nearly half of all adults (48%) claiming that they are spending more time shopping around for the best deals, a 12% increase since mid-May.




## Silent nights (and days) for retailers

But, the festive season is, as we know, a rule unto itself.

The problem for the beleaguered High Street is that over half of all UK consumers (55%) still say that they are going to try and avoid shopping in person as much as possible over the Christmas (+2% since July), whilst the number who state that they are planning to buy more of their gifts online has increased by 6% to just over half (51%). The possibility of a series of very silent nights for bricks and mortar stores looks increasingly probable.

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Intentions and reality are of course two very different things, but with 41% of the population planning on spending less on gifts this year, the anticipated boost in sales from the lifting of lockdown may fall short of expectations.

There are, however, some glimmers of hope. More than two in five consumers (45%) state that they are aiming to shop locally over the festive period. However, the number who say that this means visiting the high street in their local area has fallen to 44% (-11% from September) whilst those who say that they are planning to buy independent retailers in their area is also down to 45% (-8%). With the plight of small businesses gaining increasing coverage, local does not equate with location, but with supporting independent businesses through online purchases.


## So, No, Ho, Ho?

With less than three weeks to go, are consumers looking forward to the festive season?

Well, yes and no.

The number of consumers who feel that their lives have been heavily disrupted by the pandemic has increased once more to nearly three in five (59%). Whilst this is up 8% from late September, it is still 11% less since its peak in the second week of the UK's first lockdown.

The realisation that Christmas may be a very different affair this year, however, has not significantly impacted the importance the UK population continue to place on the holiday. Whilst over a third of parents (34%) are worried that their children won't enjoy Christmas as much this year, overall two in

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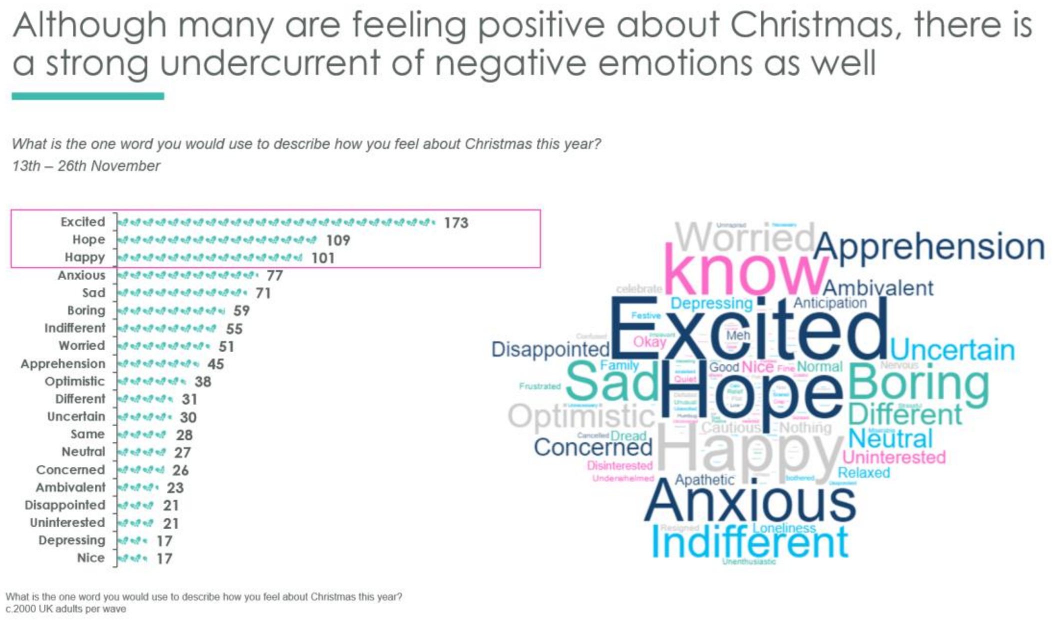
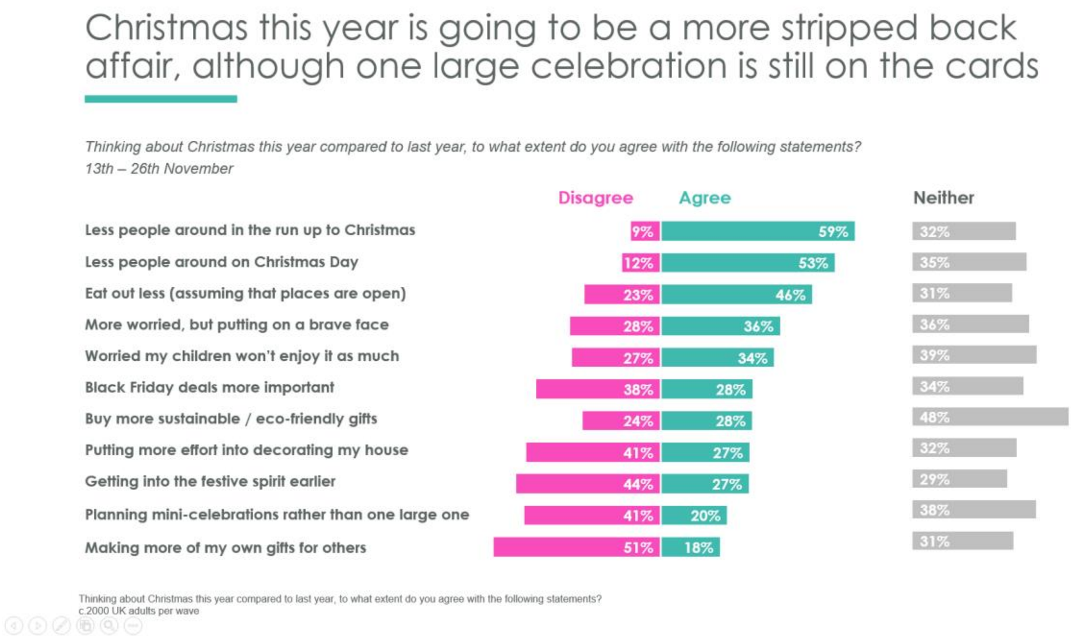
five (44%) Brits still state that Christmas will be more important than ever this year (-2% since July) and the three emotions felt most strongly by the public are **excitement**, **hope** and **happiness**.




Yet fear of infection, of harming loved ones, continues to play heavily on the minds of consumers with 51% (+8% since July) concerned about endangering the health of their friends and family over the holiday period. To combat this, nearly three in five (59%) state that they will have less friends round in the run up to Christmas and over half (53%) will have less people round than usual on Christmas day.

Rather than reveal our concerns to family and friends, however, over a third (36%) are going to be putting on a brave face and over a quarter (27%) are putting more effort into decorating their homes and planning on getting into the festive spirit earlier than usual.

As we edge closer to Christmas, however, it is not simply fear of physical harm, but the auxiliary consequences of COVID which are starting to impact future behaviour with just under one in three (32%) consumers stating that they are worried about their finances, and two in five (41%) aiming to spend less on gifts this year.




## Frosty the brand land

With the fear of recession looming on the horizon it’s unsurprising that consumers want to see communications which feature discounts and offers above anything else.

Communications preferences popular during the initial weeks of lockdown are out.

Partnerships with charities remain low down on the list of priorities at 14%, along with tales of overcoming adversity (14%), real-life stories (11%) and messages from employees (5%).

Instead, consumers want to escape the restrictions of the pandemic (at least momentarily) with over a third stating that they wish to see content which embraces the Christmas spirit and focuses on reconnecting with friends and family (24%). However, for brands hoping to connect with those aged 18-34, showcasing traditional values is less relevant with only 12% stating that they want to see this type of content compared to over 20% for other age groups.

## People would most like to see discounts and offers, as well as content that embraces the spirit of Christmas

What type of communications content would you like to see over the Christmas period?
*13th – 26th November*

| | Total | 18-34 | 35-54 | 55+ |
|---|---|---|---|---|
| Discounts and offers | 33% | 32% | 39% | 29% |
| Embracing the Christmas spirit | 32% | 30% | 34% | 32% |
| Reconnecting with friends and family | 24% | 22% | 23% | 26% |
| Showcasing traditional values | 20% | 12% | 21% | 25% |
| Remembering those impacted by Coronavirus | 19% | 16% | 17% | 22% |
| Celebrating getting through lockdown | 17% | 18% | 17% | 17% |
| Products and services | 15% | 14% | 17% | 15% |
| Showcasing what brands are doing to support... | 15% | 18% | 15% | 12% |
| Partnerships with charities | 14% | 16% | 16% | 12% |
| Overcoming adversity | 14% | 14% | 15% | 13% |
| Real-life stories | 11% | 15% | 11% | 6% |
| Looking back at the past | 9% | 10% | 8% | 8% |
| Messages from employees | 5% | 8% | 6% | 2% |

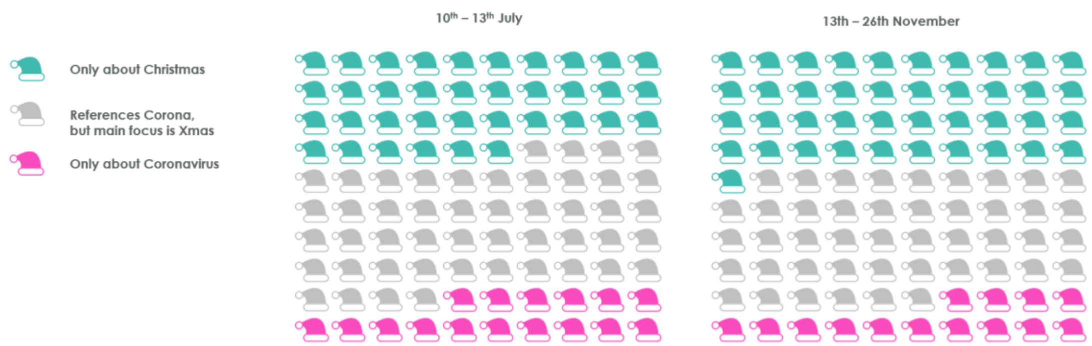
We'd now like you to think about different types of communications from brands over the Christmas period. Would you prefer these to focus on...
c.2000 UK adults

## Dreaming of a COVID Christmas

As we edge closer to Christmas escapism remains high on the agenda with two in five of the population (43%) only wanting to see content from brands that concentrates on Christmas (+9% since October). Just under half (45%) would prefer to see content that focuses on Christmas but acknowledges Coronavirus, but as fatigue sets in, only 12% of all consumers want communications to only focus on Coronavirus.

## When it comes to the trade-off between Christmas and Coronavirus in advertising, Christmas is more important

Would you like advertising to be about Christmas or things related to Coronavirus (e.g. lockdown, social distancing or responding to the crisis)?

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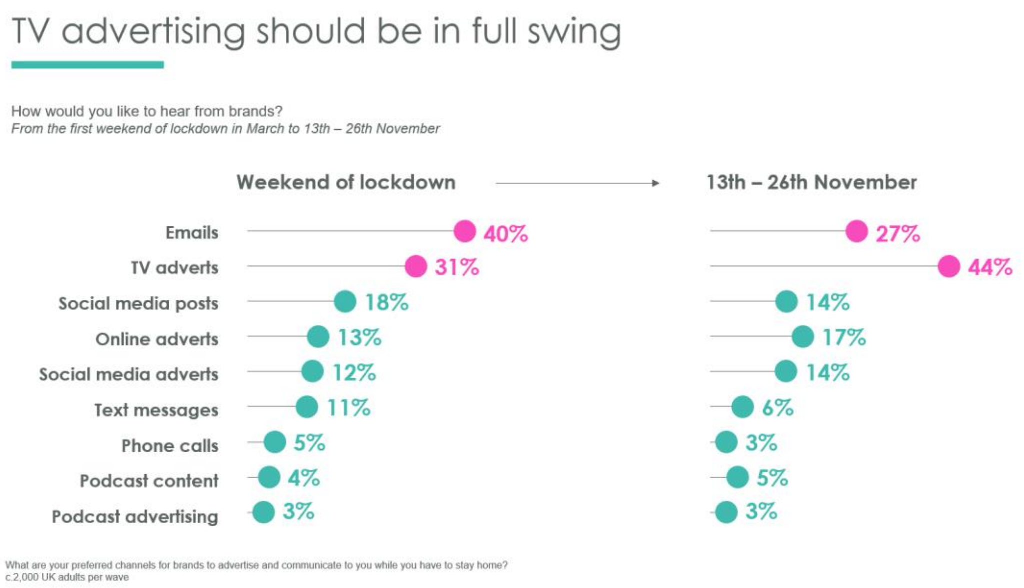
So, having sorted what consumers want to see, does it matter where they see it?

Unsurprisingly, the answer is yes. Whilst emails remain the second most preferred form of communication from brands (-13% since the first week of lockdown in March), as the nights close in the popularity of TV advertising across all age groups has soared to its highest level since March (+8%). This is reflective of the fact that nearly two in five (38%) state that they have found themselves watching more live TV than usual.




## New Year, new you?

But what about the year ahead?

Well, firstly it is clear that Covid has had an impact on future priorities. Amongst the usual New Year resolutions to losing weight and exercise more, over a third of the population (35%) are aiming to see more of their friends and family and over a quarter (27%) want to travel more after the series of travel bans and thwarted plans.

The economic uncertainty created by the pandemic has also meant that only 6% of the population are planning to change jobs, whilst a mere 5% are aiming to complete Dry January indicating that perhaps the lack of Christmas parties and festive socialising has meant fewer people feel the need to reduce their alcohol intake.

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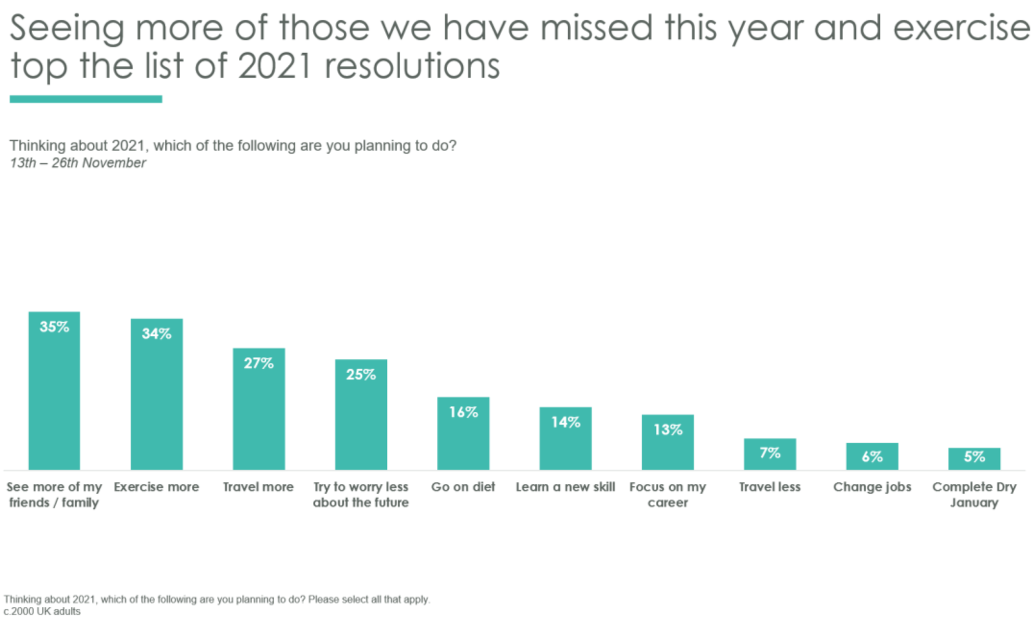


## One final thought

People across the UK have undergone huge changes to the way they interact with each other and brands, yet over the course of our research we've found consumers to be resilient and resourceful. As the current recession and economic impact, let alone a potential return to lockdown, begin to bite, it is now the turn for organisations and companies to also show resolve and innovation – especially at Christmas.

If you'd like to make sure that your advertising and communications strikes the right tone and conveys the right messages, get in touch to find out about our advertising optimisation tool at research@opinium.com

# About Opinium

**OPINIUM** is an award-winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on pulse of what people **think**, **feel** and **do**. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and overcome strategic challenges – helping them to get to grips with the world in which their brands operate. We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes.

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