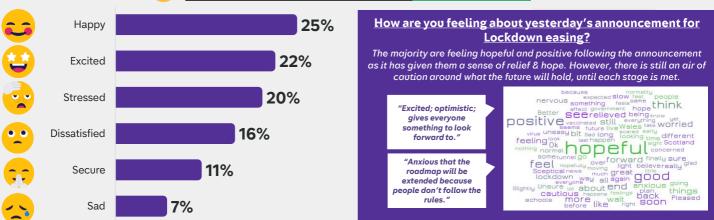
THE UK RESPONSE: LOCKDOWN ROADMAP

Following Boris Johnson's Roadmap announcement on Monday the 22nd of February, we

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<u>HOW THE UK ARE PLANNING FOR THE FUTURE:</u>

Thinking about each of the steps; we'd love to know if you're going to be making any plans?

The main priority for those making plans was to catch up with family and friends when each stage allowed them to do so, with some mentioning they had celebrations to catch up on. A small amount discussed holiday plans they want to make for the summer, in fact, they plan on going on holiday more regularly vs. before the lockdown begun. They're now 31% more likely to say they'll regularly go on holiday compared to before the lockdown. Many discussed anxiety they had around making plans in case the proposed dates are amended, a small amount are waiting to have their vaccination before they make official plans.

"I already have a holiday booked for June so I'm hoping that can go ahead as well as spending sunny warm evenings with friends and eventually being able to hug my **TOP 5** LOCKDOWN RESTRICTIONS THEY'RE MOST EXCITED TO FULLY RETURN:



<u>4</u> WHAT THIS MEANS FOR BRANDS:

THE UK ARE HOPEFUL FOR THE FUTURE & HAVE USED LOCKDOWN AS AN EXCUSE TO SAVE MONEY:

Source: OnePulse, sample = over 500 UK 16+ Adults, three tasks in total, 23rd of February 2021

What type of message would you like to see in brands advertising once the lockdown ends?

There's three key messages the UK would like in brands advertising:



PRIORITISING HEALTH & SAFETY: They expressed how they'd like

brands to ensure that health and safety was prioritised. Many felt brands could lead in this space and spread this message, preventing surges in coronavirus cases. They also would like brands to explain what the protocols and

expectations would be when visiting them, what would be expected of the customer.

<u>POSITIVE</u> <u>VIBES:</u>

Given that many felt hopeful about the year ahead following the announcement, many also wanted brands to reflect this message in their advertising. Some suggested that they'd like brands to celebrate with them and spread the positivity too. A few spoke about how they'd also like to see 'welcome back' messages in brands advertising.

FINANCIAL SUPPORT:

A smaller amount spoke about how they'd like to understand how brands can support them. Some spoke about brands potentially offering 'welcome back' offers and discounts to support their customers.

THEYOUTH RESPONSE: MOMENTS



Following Boris Johnson's Roadmap announcement on Monday the 22nd of February, we spoke to over 570 16-24s to see how they felt.

HOW YOUNG PEOPLE ARE FEELING: 32% How are you feeling about yesterday's announcement for Stressed 20% Lockdown easing? 20% Interestingly, 16-24s are approaching the announcement with more Dissatisfied 16% scepticism and apprehension. The emotion they identified with most is stressed vs. the top emotion for adults which was feeling happy. 18% 22% 16-24s Excited lockdown "My initial reaction was time more re agree over bookin hough go forward bac way income agreed just 16+ certainty, I didn't want to start get my hopes up too much as I didn't want to be let down back 17% like Secure 11% because again." hopeful or lifefirst tra 8% "My initial reaction was Happy nent because I can't wait stillfeel pend some and all going about cite 25% for things like gyms, beauty alons, cinemas and bars/niah again 5% clubs to open again." Sad 7%

BARE AND A PEOPLE ARE PLANNING FOR THE FUTURE:

Thinking about each of the steps; we'd love to know if you're going to be making any plans?

There's a mixture of feelings towards making concrete plans as some are cautious about it being safe to do so or about the stages being moved back. However, for many they've started planning what they will do at each stage of the roadmap. There appears to be particular excitement around stage 2 (April) where they spoke about meeting friends at the pub, in restaurants, going shopping and going to the hair salon, a few have began planning staycations for this stage. For stage 3 (May), many spoke about plans to revisit cinemas and theatres which they had missed not being open. Whilst for some, stage 4 (June) felt too far away to plan anything yet, for others, there was a real enthusiasm about social gatherings and nights outs with friends. Some even spoke about plans they were making for holidays abroad.

"I will definitely be intending on going out to restaurants with whoever is willing to go with me! Eating out is one of my favourite things, and I need to see people! Perhaps plan a staycation if cheap enough but we shall see!"

44%

can't wait to see

family and friends

(vs. 57% for 16+)

32% feel hopeful following

the announcement

🗸 (vs. 44% for 16+)

TOP 5 LOCKDOWN RESTRICTIONS THEY'RE MOST EXCITED TO FULLY RETURN:



<u>4</u> WHAT THIS MEANS FOR BRANDS:

ALMOST HALF OF YOUNG PEOPLE HAVE SAVED MONEY DURING LOCKDOWN:

48%

during the lockdown

44%

lockdown has finished

16+) (vs. 39% for 16+)

16+) (vs. 27% for 16+)

What type of message would you like to see in brands advertising once the lockdown ends?

There's three key messages young people would like in brands advertising:

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HOW CONSUMERS ARE KEPT SAFE:

Many young people wanted brands to communicate how it is they plan on keeping customers safe when interacting with them. They also felt that brands could help with

communicating that we still need to be cautious and have measures put in place to all keep safe e.g. social

Source: OnePulse, sample = 500 UK 16+ Adults, three tasks in total, 23rd of February 2021. 4Youth community = 75 16-24s, 1 task, 23rd of February 2021

POSITIVITY & FREEDOM:

Some spoke about how they'd like brands to spread positivity and the idea of freedom in their messaging. They'd like brands to embody this feeling of hope for the future, many spoke

for the future, many spoke about how they didn't want to see all advertising focused on Coronavirus and the lockdown.

<u>WELCOME</u> <u>BACK:</u>

Young people also wanted brands to take the opportunity to reconnect with consumers, offering welcome back messages in their advertising.

messages in their advertising. They wanted brands to be down to earth and show that they're all about real people. Some spoke about how brands could nurture loyal customer bases by offering discounts or sole items.