

WHAT'S MOVING THE NATION?

A regular check-in on what people of the UK are feeling, and doing, and what this could mean for brands.

BY **TMW**

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We've been using polling to track the mood of the nation for the past five years, via our Human Understanding Lab.

Each quarter, we use this data, as well as social listening and cultural trends to get under the skin of how the UK is *really* feeling.

The cost of living crisis, war in Ukraine and climate anxiety are all contributing to increased feelings of worry, sadness and stress.

The severity of the problems we face raises big questions for brands and how they operate under the current circumstances. Can they really afford to put people before profit right now?

The evidence suggests that the time for empty words has gone, and brands must act with a community spirit.

Their future could depend on it.

Three ways brands can help...

- 1. Forget empathy: do something**
- 2. Time for talking about the environment is over, own it**
- 3. Optimise life for a better connection**

1. Forget empathy: do something

The time for showing understanding is over – it's time for action.

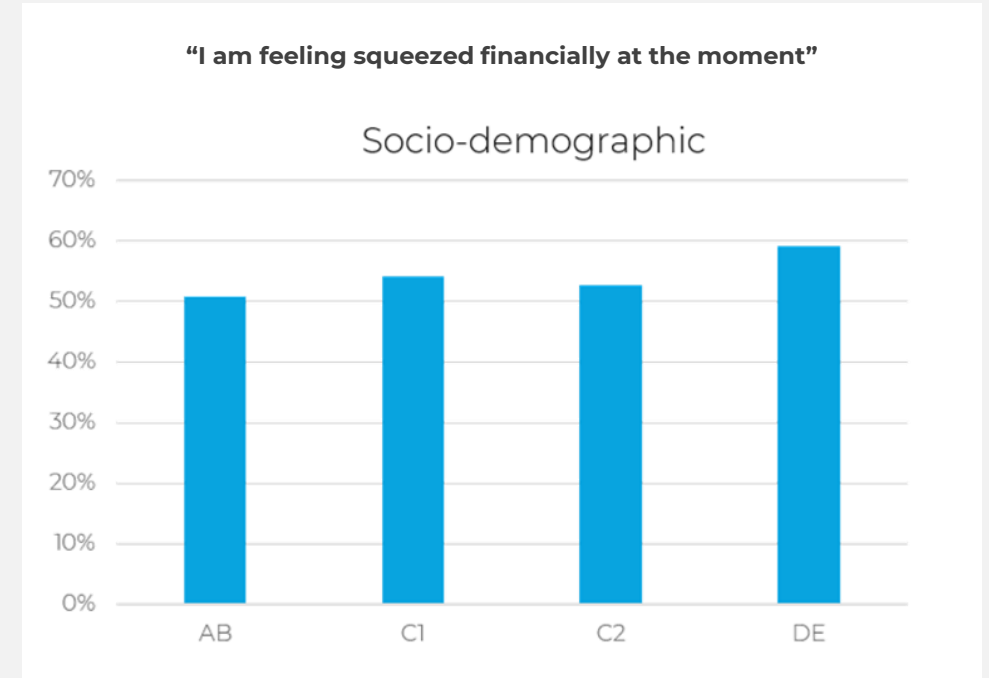
As the cost of living crisis impacts more people, brands need to go beyond empathy and slogans by providing solutions that will make a tangible difference in helping their customers. Who is being affected by the cost of living crisis? Almost everyone, particularly younger and middle aged generations. In all groups under the age of 55, over 60% of people agreed that they feel 'financially squeezed' at the moment. With winter approaching and interest rates rising further, the expectation is that things will only get worse.

Similarly, when you look at sociodemographic breakdown, anxieties about cost of living are widespread. It's perhaps unsurprising that people in the DE socioeconomic groups are feeling the pinch the most (59%), but the lack of variance between groups is striking. In groups AB, C1, and C2, between 51% and 54% feeling financially vulnerable.

We may have to broaden the definition of 'financially vulnerable' to include groups of people who would have considered well off until recently, a development that brings home how ubiquitous this economic crisis is.

It's difficult to overstate how much companies' brand health could depend on how businesses react at this time of customer need. Of course tone is as important as ever, but activations need to be underpinned by real substance.

People have long memories when it comes to times of crisis. Brands that help will reap the rewards in the long-run, and those that are seen as exploitative could pay the cost.



36%
expect brands to freeze their prices

57%
expect brands to keep prices fair

73%
being more cautious with spending

2. The time for talking sustainability is over

There's been enough empty promises; brands need to tackle the climate crisis head-on

The impact of climate change is becoming more apparent every day, and so the requirements for brands to act on climate change is becoming increasingly urgent.

Contrary to some suggestions, it's not just young people who are concerned about climate change. In fact, the data suggests that a higher proportion of middle aged to older people are concerned than younger groups.

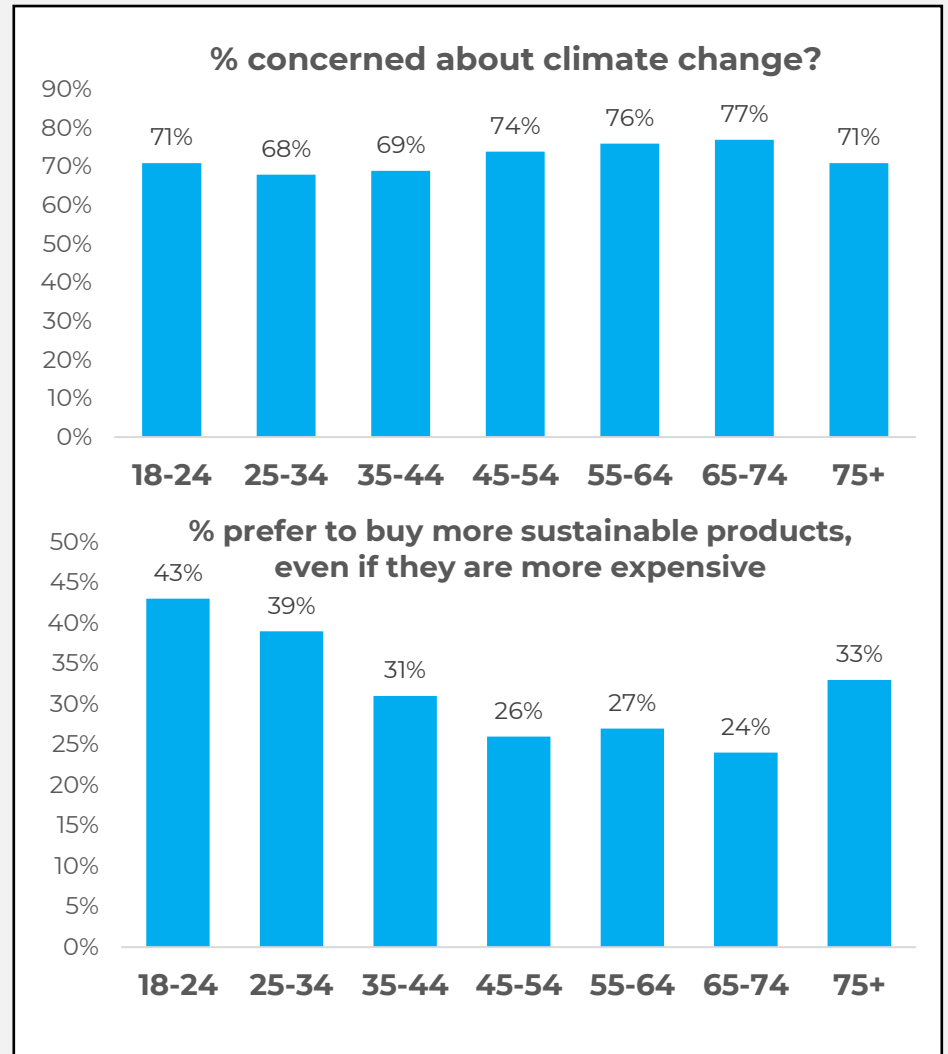
Interestingly though, it is true that younger people often appear to be more willing to make sacrifices, with 18–24-year-olds the most likely to spend more in order to improve sustainability.

The data suggests that people want to live sustainably, but generally don't believe it's personally beneficial to them. 62% say they're interested in living more sustainably, but only 47% think that living sustainability benefits them.

The most important figures when it comes to brands relates to how much responsibility the public place on businesses when it comes to the environment. 73% of the public believe it's up to brands to come up to solutions to the climate crisis, which is startlingly similar to the responsibility placed upon the Government.

This suggest people think the climate crisis can't be solved by legislation alone, and that they recognises the power and influence that the biggest brands wield.

As with the cost of living crisis, all of the evidence suggests that businesses need to act decisively and strongly. Consumers will remember if they don't.



3. Optimise life for a better connection

There's been enough empty promises; brands need to tackle the climate crisis head-on

The pandemic impacted our ability connect to one another. At the time, brand communications were rightly stressing the collective need to support communities, and it felt like every brand was saying that we'd "get through it together".

Sadly, despite being through the most isolating aspects of the pandemic, the reality is that loneliness remains a severe and often invisible issue.

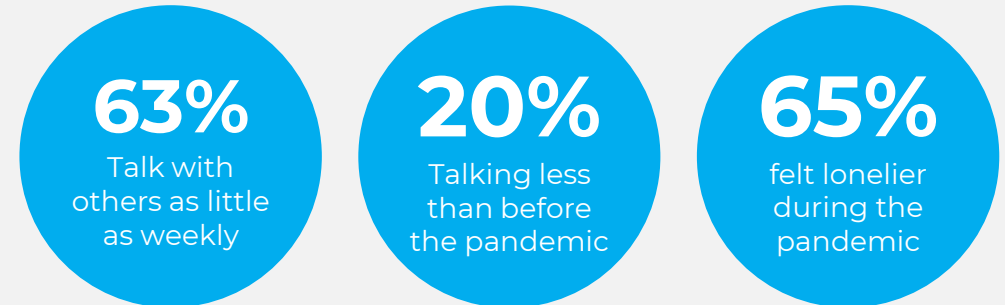
Whilst the pandemic is generally not dictating most people's day-to-day lives, the epidemic of loneliness is still a real issue. In truth, issues of disconnection had been a problem long before Covid, but lockdown exacerbated feelings of isolation and we've not yet returned to (the already concerning) pre-pandemic levels.

All the studies show that talking is good for us. When we're communicating with others in positive conversations our bodies produce a lot of dopamine and endorphins. It's not just about the feeling, there is evidence that loneliness can affect our physical health and our life expectancy too.

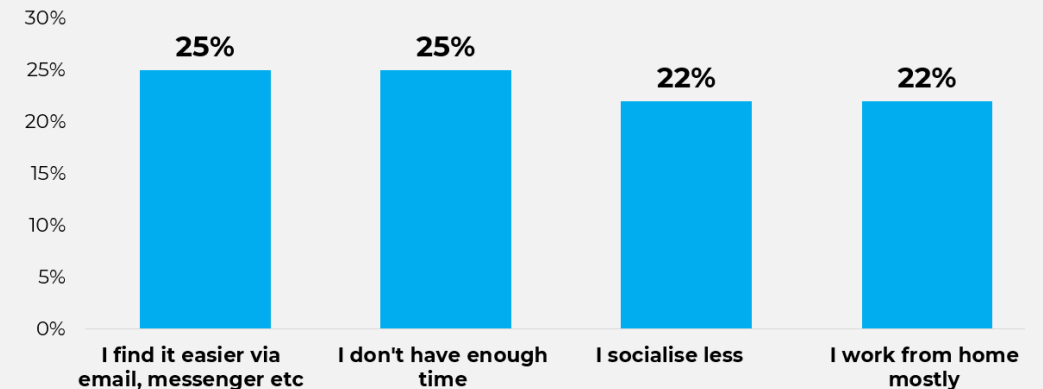
So, what's causing this? Our respondents listed multiple factors for feeling lonely, from finding online conversations easier and not having time, to blaming the shift towards a working from home.

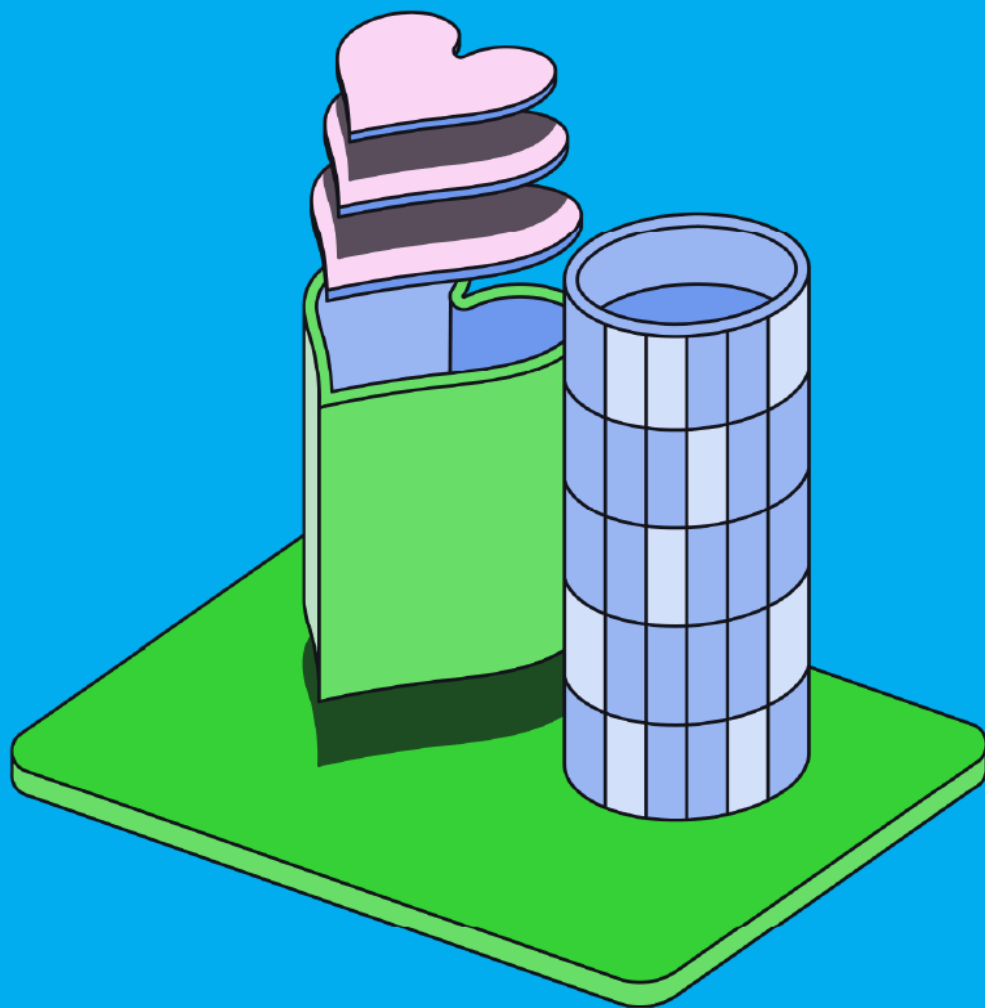
This worrying situation presents a fantastic opportunities for brands to part of the solution. There will be countless ways to encourage small talk and genuine human connection between their customers.

By facilitating these conversations, brands can embed themselves with the population, and play a key role in improving many people's lives.



What stops you having face to face conversations?





Thank you

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