

Understanding the Nation.

Tracking the nation's pulse since January 2018.

WAL
NUT

The human understanding agency.

Understanding the Nation.

T H E B A C K G R O U N D

What is it?

Walnut has been tracking the views of the nation since early 2018 on key issues such as:

- Financial certainty
- Safety
- Physical health
- Household finances
- Mental health

We are now supercharging this study to understand our nation through this 'COVID-19' period. What is the impact on the nation compared to other turbulent times? What can you and your brand do about it?

O U R O F F E R

What?

Walnut Unlimited is offering its clients first access to the following :

- Full access to all trended data from 2018 to the present day
- Ability to add on customised questions to reflect key issues in your sector
- Fast turnaround research report including trended data and your customised questions & analysis

When?

Fieldwork will be carried out each weekend according to demand

Investment each wave?

£800 for full access to the trend results, charts and tables
Plus £300 per customised question added to the reporting

*Bespoke analysis & consultancy is available

Understanding The Nation – What You'll Get.

Trended data and analysis for each measure

How are you feeling about the following aspects of your life?
(How worried are you about the potential impact of coronavirus on these aspects of your life?)

Your life in general
Your household's current financial situation*
Your current home/property*
Your current physical health*
Your current mental health*
Your current work prospects*
Your current personal relationship e.g. partner, married, single etc.
Your current family life
Your current contribution to society e.g. local community, charity etc

How you feel about the following aspects of Britain ?
The general economic well-being of this country
The general mood of this country
The certainty of this country's future
This country's approach to mental health
The safety and security of this country
This country's approach to immigration
The general health and well-being of the country

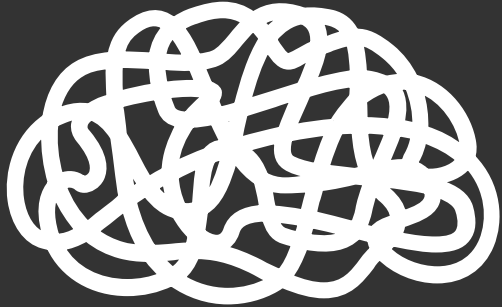
Since the outbreak of coronavirus in the UK, have you done any of the following? (*)

Changed or cancelled holiday plans
Delayed buying certain non-essential items such as furniture and electrical goods
Taken more exercise
Stopped using public transport
Stockpiled food
Stockpiled toiletries, toilet roll and medicines
Changed your personal cleaning/hygiene habits
Stopped travelling to work and worked from home instead
Ordered a takeaway
Taken out a new entertainment subscription
Looked for some new recipes
Upgraded my broadband speed
Done shopping or other errands for a neighbour
Bought more hand sanitiser
Self-isolated
Stopped shopping in stores/shopping centres
Stopped visiting elderly relatives/people
Made more online purchases
Negotiated a new deal on your rent or mortgage
Stopped working
Started home schooling child/ren
Done some DIY/decorating
Taken out a new loan
Made a holiday insurance claim

Which, if any of the following, best describe how you currently feel?

Stressed
Relaxed
Sad
Happy
Confused
Secure
Uncertain
Calm
Scared
Unconcerned
Overwhelmed
Positive
Worried
Confident
None of these

* Note: this question will evolve over the emergency period to reflect latest trends and client priorities)



DO YOU FEEL A SENSE OF

HELPLESSNESS

when you look at mainstream news and
social media reports about COVID-19?

You certainly wouldn't be alone!

For a long time, we've been using **BEHAVIOURAL SCIENCE** to analyse how people think, feel and behave in different scenarios. We never really expected to be applying those principles to something as extreme as a global pandemic; but it highlights the importance of using our knowledge as marketers wisely.

How brands, public information services and governments choose to communicate with us during this time is of critical importance.

Applying behavioural science insights to designing messages from brands and other organisations can be an effective way to reduce uncertainty and fear. We need to address the dynamics of uncertainty.



TAKE ACTION

IMPLICATIONS



Our research has identified some clear areas for brands to focus on to help consumers navigate a difficult period.



O N E

Define a new 'togetherness'.

Consumers seek order from disorder, they need reassurance in a time of turbulence and uncertainty. Positivity around mental health has seen the biggest decline from Sept to March. The nation considers the country's attitude to mental wellbeing to be somewhat negative.

At the same time, family life and personal relationships continue to be the area with the highest positivity. Amidst a potential mental health crisis, as the nation becomes overwhelmed by a new way of living, brands need to respond to these new priorities in order to form positive emotional connections. In some instances, this will require resisting the temptation to make short-term sales gains, in order to build longer-term equity.

Consider how your brand can build a sense of togetherness – be it through a spotlight on community spirit, on facilitating a new form of socialising, inspiring learning of new skills or even making working remotely easier... Anything that can help people to prioritise their relationships and focus on their mental wellbeing.

DEFINE A NEW TOGETHERNESS

Spotlight on Houseparty.

As social distancing measures were slowly brought into effect, the nation sought new ways to connect with their loved ones.

Enter: Houseparty. An alternative approach to video-calls, the app topped 2million global downloads in mid-March, with a focus on socialising virtually and spontaneously.

The key here is that Houseparty taps into the nation's usual social habits and provides a way for these to still happen (albeit in a virtual world). From Friday night drinks to pub quizzes, the app's recent success is reflective of our desire to stay connected to those we love. Swipe between 'rooms' for an instant connection to your contacts.

Suddenly, lockdown didn't feel quite so lonely.



Take note

Find routes to recreate the way we socialise in normal situations - offer consumers flexibility and choice.

Whilst nobody can deny the seriousness of the current situation, providing a moment of escape and light-heartedness is needed. Put an emphasis on fun where possible!

A seamless digital experience is more important than ever and will separate the brands that thrive from the ones that struggle to cut through. Ensure your UX is as easy as possible to navigate, with as few steps as possible.

T W O

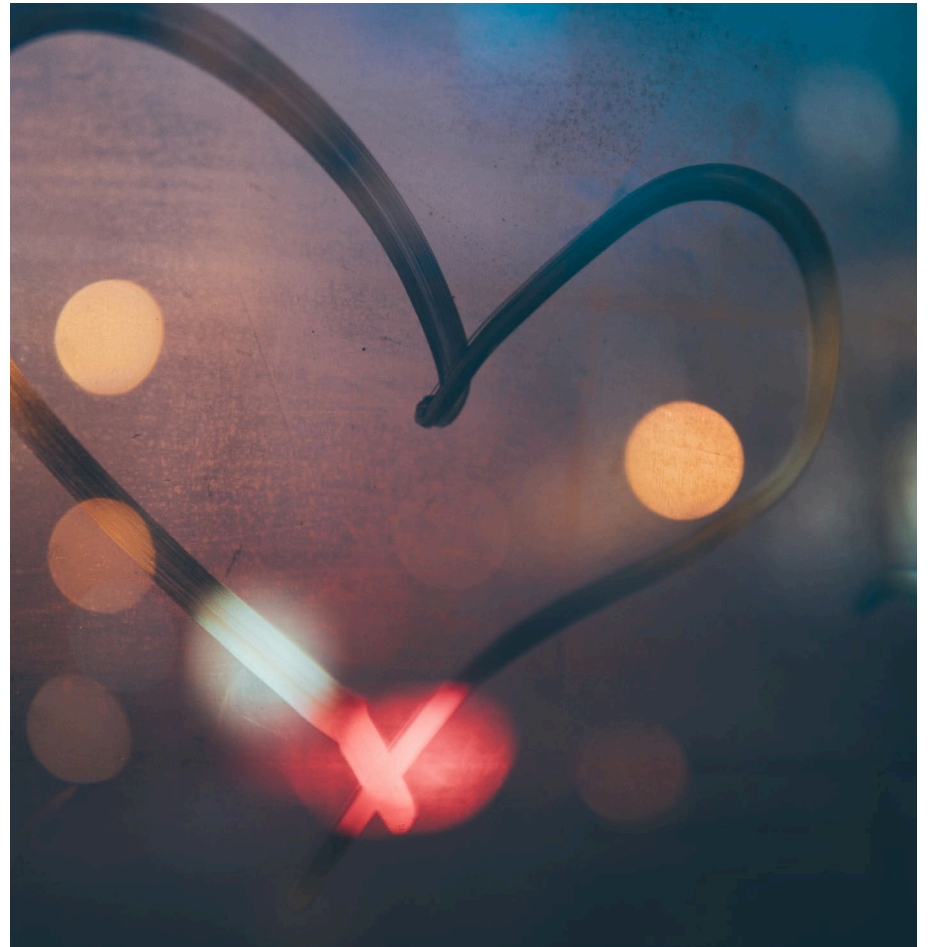
Make me feel good.

Unsurprisingly, optimism has waned as society faces weeks, months, potentially years of disruption. With a constant stream of negative news stories, there's a real opportunity to identify moments that are going to make your customers feel good and like they're 'doing their bit'.

With economic uncertainty, pessimism around future work prospects is growing – even before the country went on total lockdown. For some, the certainty of their livelihood has been turned on its head overnight.

Interestingly, in the midst of the chaos, there is a real appetite for individuals to feel they can help. Individuals' contribution to society – including charities and the local community – has grown. Never before have we seen our neighbours, communities and loved ones under such a large-scale threat – and people crave that feel-good vibe from helping.

Behavioural Science has shown us the power of motivating consumers through feedback – this is a simple way to make visible the small contributions we can all make. From supermarkets sharing how many elderly shoppers have been served by the sacrifice of the first hour of shopping time, to shining a spotlight on local heroes – there's a role for brands to spread the feel-good vibes and mitigate the negativity.



MAKE ME FEEL GOOD

Spotlight on Iceland.

Iceland were the first UK supermarket to dedicate the first hour of opening to the elderly and vulnerable in an effort to help those that need it most to get what they need.

In an era of panic-buying and stockpiling, this was a strong example of how to make the public put others first. Whilst inconvenient for some, it ultimately enabled other shoppers to visit their Iceland store guilt-free later in the day.

It also gave a very clear message from Iceland that they weren't on the side of those behaving selfishly and were willing to implement radical changes to counteract this. Whilst Iceland are often dwarfed by the other grocers, in this case, other supermarkets quickly led by example.

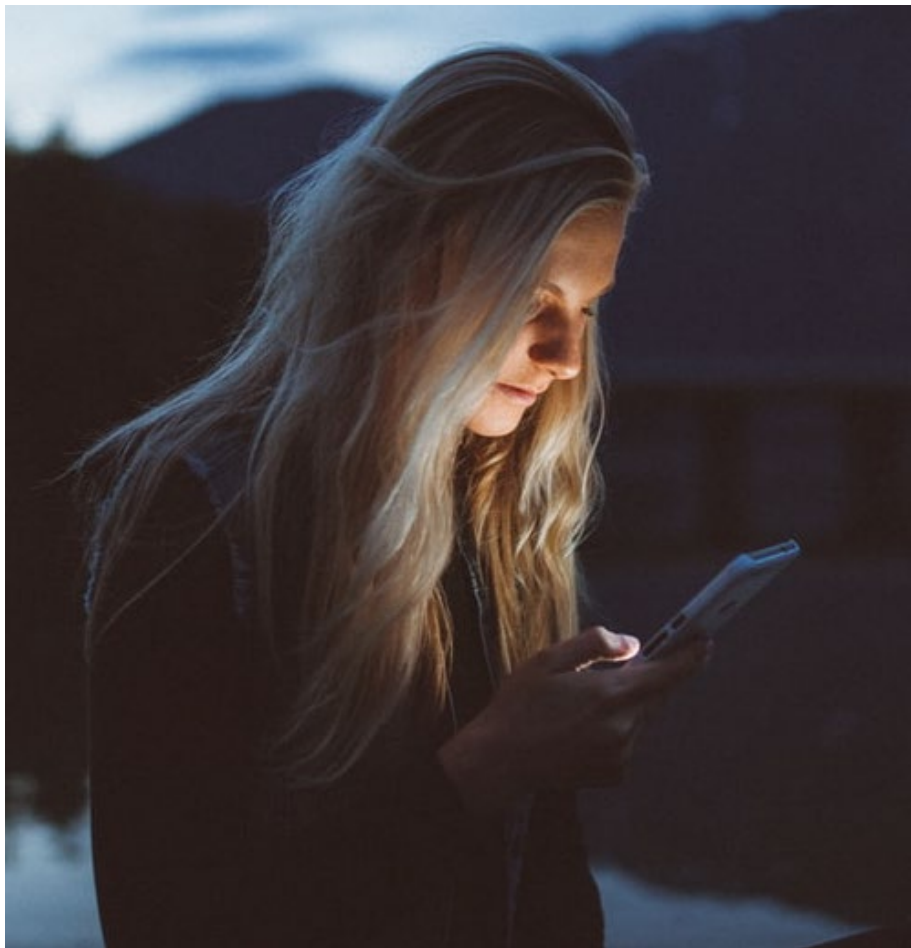


Take note

Now is the time to create memories that will stick with consumers for years to come. Find a way to deliver a moment of optimism and drive buzz.

Make it feel authentic for your brand, category and audience. As a supermarket continues to give shoppers the convenience they crave, as an activewear brand find ways to promote body positivity, as a bank gives your customers security.

Be adaptable. As the world changes around us, long-term strategies are hard to build. Focus on short-term goals and be prepared to get creative with limited touchpoints.



T H R E E

Stay relevant.

At a time when everyone is worried, concerned and uncertain, the last thing they want to see is content that isn't appropriate or relevant. Content that reminds them of what 'normal life' should feel like or what they're missing out on. This creates cognitive dissonance and could damage your brand perceptions in the long term – even once society begins to normalize.

Consumers are worried, irritable and less forgiving as life has taken a serious turn. Since this time last year, the nation's general sentiment towards life has declined by 5% - with only a third feeling positive!

As a brand, the important thing to do is to be empathetic, be human and show your brand's genuine, authentic concern for your customers across all touchpoints. Tailor content to match the new world of lockdown that we all face. Adapt to keep your loyal base engaged and acquire a new, captive audience.



Take note

Stay visible to your customers – engage in regular dialogue and make sure you have something new to say.

Don't lose your brand essence – it's what built your fan base in the first place. Ensure all comms retains this brand personality, but does so in a way that places customer safety and happiness at the forefront.

Identify the best platform to communicate important messages to your customers. Deliveroo used the app itself to spotlight new safety processes – but for some brands cueing these sooner could be more effective.

Provide consistency where you can – if your customers normally purchase at the weekends, give them a gentle nudge at the optimal moment.

STAY RELEVANT

Spotlight on Deliveroo.

In a world where consumers can't leave their houses, takeaways are one of the remaining indulgences we still have access to.

With thousands of restaurants, chefs, delivery drivers and customers within its network, Deliveroo needed to think fast to adapt its platform in a way that felt valuable, not opportunistic; reliable, not irresponsible.

Throughout the pandemic, Deliveroo has been quick to tailor its content to provide a glimmer of normality in an unfamiliar world. With timely updates on the extra safety measures being put in place within the network, to a new 'contactless delivery' function, the brand has not only remained relevant and true to its personality, it has extended its reach to a new audience.

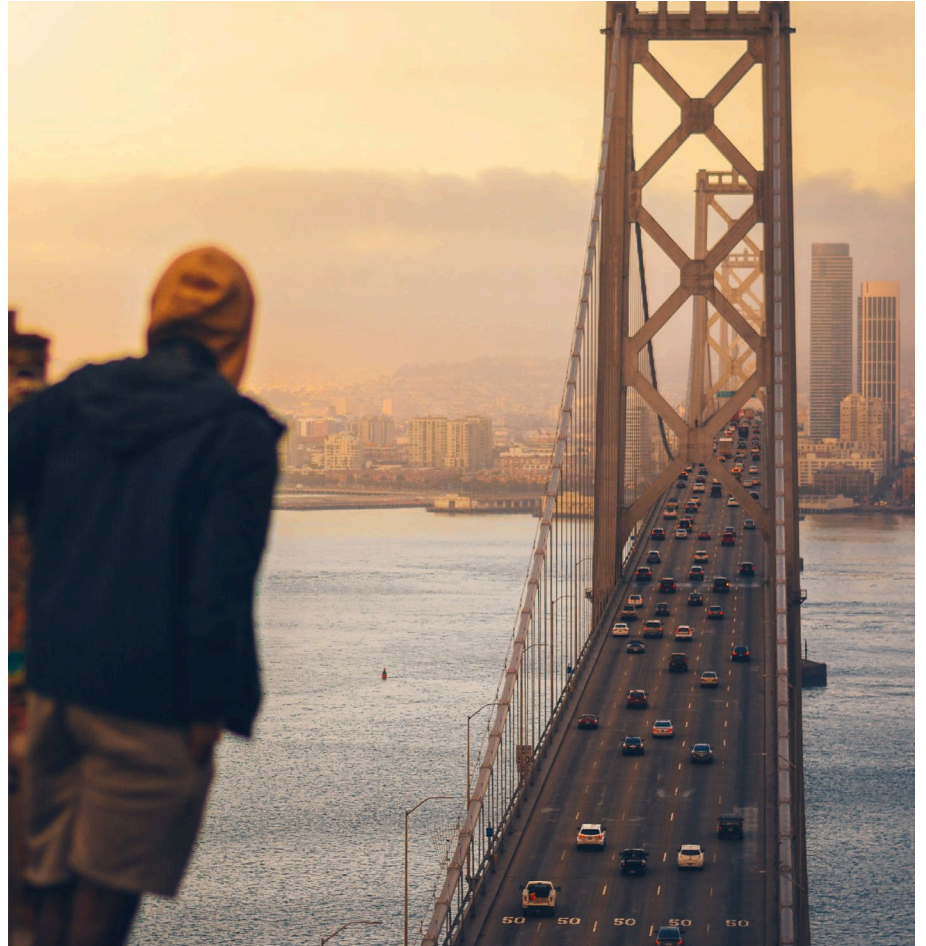
FOUR

Create structure.

All plans have been put on hold. From holidays to weddings, festivals to house moves, we've had to throw the 2020 calendar out the window. Unsurprisingly, our data reveals an overwhelming sensation of loss of control. 44% consider the well-being of the country to be negative (rising to 49% amongst those 45+, and 51% amongst females).

Not only have social plans been paused, but for many, their work life has also been thrown into disarray. Even before the stringent lockdown guidance was implemented, workers were either finding new ways to work from home or facing the scary prospect of stopping work altogether.

Humans like order and routine – it's a natural response to our unpredictable world. Brands can help to deliver this structure in the chaos. Give your users the tools they need to create a sensation of control within the safety of their homes. From adapting delivery options, using virtual platforms to sparking ideas to fill the potentially empty days ahead for many – position your brand as a familiar friend in the eye of the storm.



STAY RELEVANT

Spotlight on Amazon.

As the king of online retail, it's unsurprising that Amazon would be the first port of call for UK consumers stuck at home for weeks, possibly months,

Convenient, accessible, speedy – the brand already owned the spaces that appeal the most in the current climate. Despite the increased demand, Amazon has been praised for continuing to meet a lot of delivery times, and where this isn't possible, the brand has called for understanding and empathy in the current climate. Their business has kept on moving!

Not only have some delivery speeds been flexed, their Audible brand has made all of its children's' e-books free to access. With many parents struggling to home-school and entertain children, this offers a clear solution.

These steps will not only generate buzz in the short-term, they attract a whole new audience, expanding Amazon's reach ever-further.



Take note

Tap into reciprocation – giving something away right now will be remembered in the future, and puts consumers in a position where they want to continue to engage with your brand.

Tailor your content to make the most of your full product range – consider which elements could provide that familiarity and routine. From exercise to home working to entertaining the whole family.

Don't be afraid to be honest with customers – we're all in this together. If delivery times need to extend, let them know why! If your workforce is reduced, make this visible but reassure. If you're prioritising essentials – shout about this!

Try to keep things moving as much as possible. Brands that are reliable and deliver as usual will further strengthen their brand health for the future.

OUR FINDINGS

THE DETAIL



Emotions.

Walnut Unlimited's Understanding The Nation Study which tracks consumers over time proved that before Boris Johnson's announcement on social distancing, over 1/3 of the nation currently feel uncertain and worried.

Bearing in mind this data was captured before the more stringent social distancing advice came out, we are planning a follow-up wave of research to see just how this has changed.

UNCERTAIN
&
WORRIED



Uncertain
37%

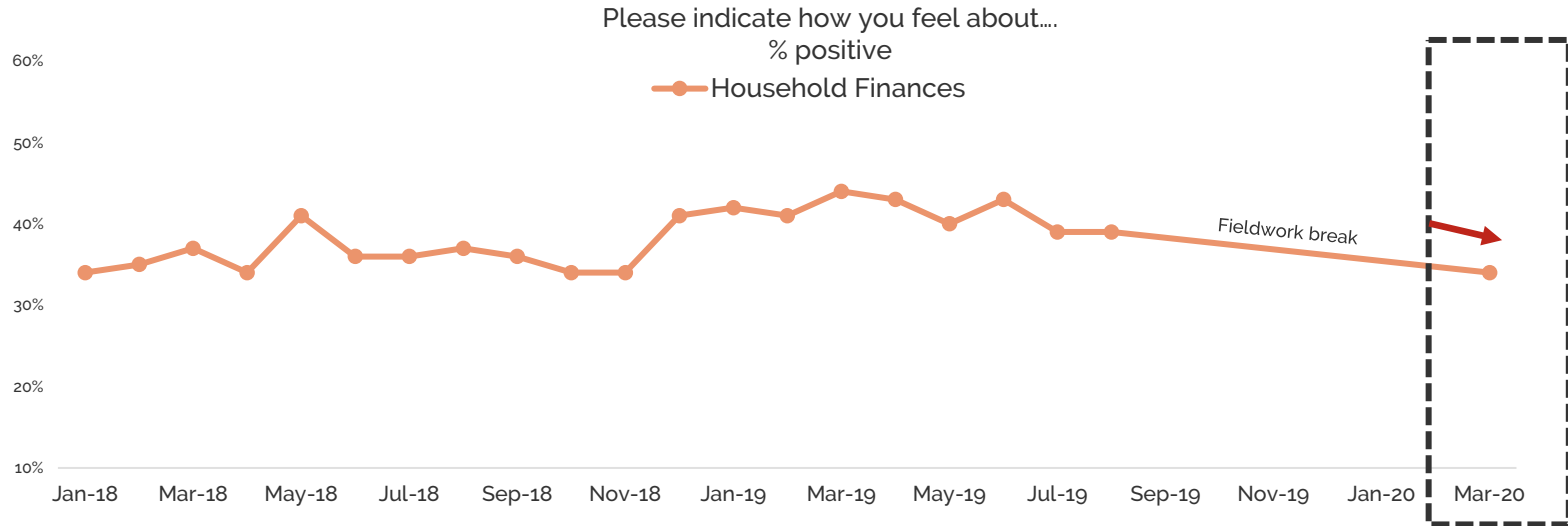


Worried
33%

F O R E X A M P L E . . .

We've tracked how positively people feel about their household finances over time. There were some low points during the Brexit Uncertainty. Already we can see confidence in household finance decline rapidly.

And what will it look like even one week on?



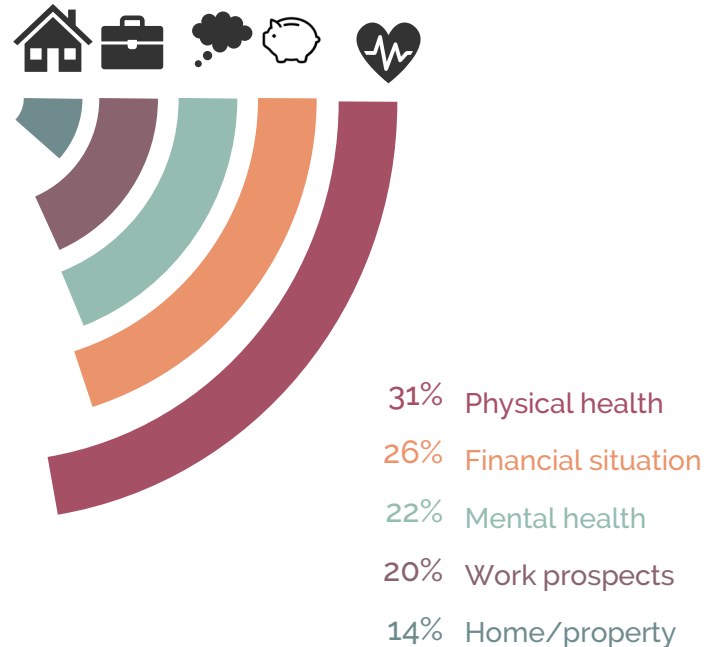
Physical health tops the list of concerns.

We certainly feel worried, as, we are sure you do too.

What exactly is it that is making people so worried?

Clearly in a pandemic situation, there are many facets of our lives that could be impacted.

We discovered that our physical health is our primary concern, just nudging ahead of our financial situation and our mental health.



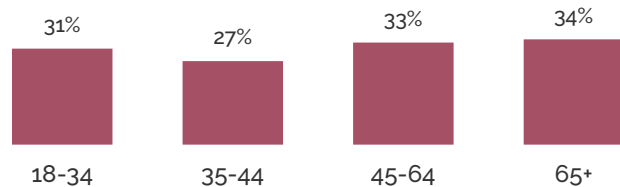
Physical health.

Physical health is a concern, not only in terms of contracting the virus, but also in surviving through potential food shortages.

Physical Health is our ultimate survival instinct. Despite the indication that COVID-19 has a potentially more fatal impact on older generations, our data shows that the level of worry around our physical health actually crosses all age groups – young and old.

The feeling of vulnerability is equally high across groups. We need to be mindful of this worry and empathetic with what everyone is going through.

% saying physical health concerns them



TESCO

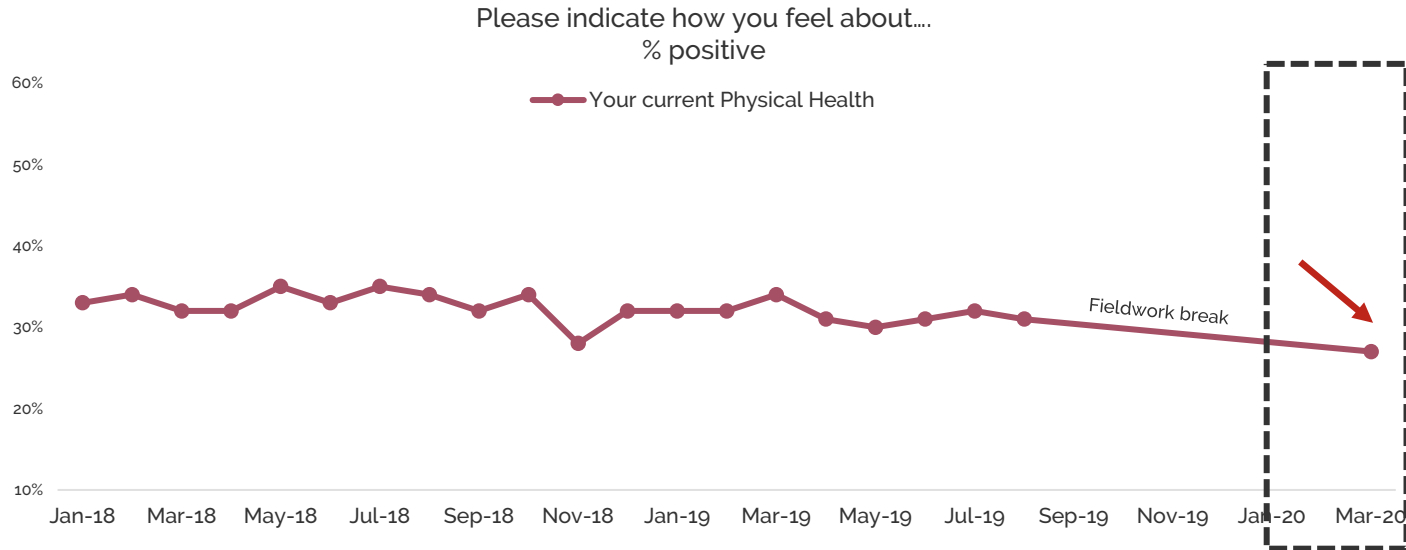
GETTING IT RIGHT

Supermarkets have worked hard to reassure on food shortage concerns.

Urging the British public to shop sensibly and to consider others, stores including Tesco have introduced an 'NHS hour' to prioritise those who are helping others and ensure they can continue to eat a healthy diet.

Physical health.

Sentiment towards physical health is currently at its lowest ever levels – at a time of year when we typically see relative positivity.



Mental health.



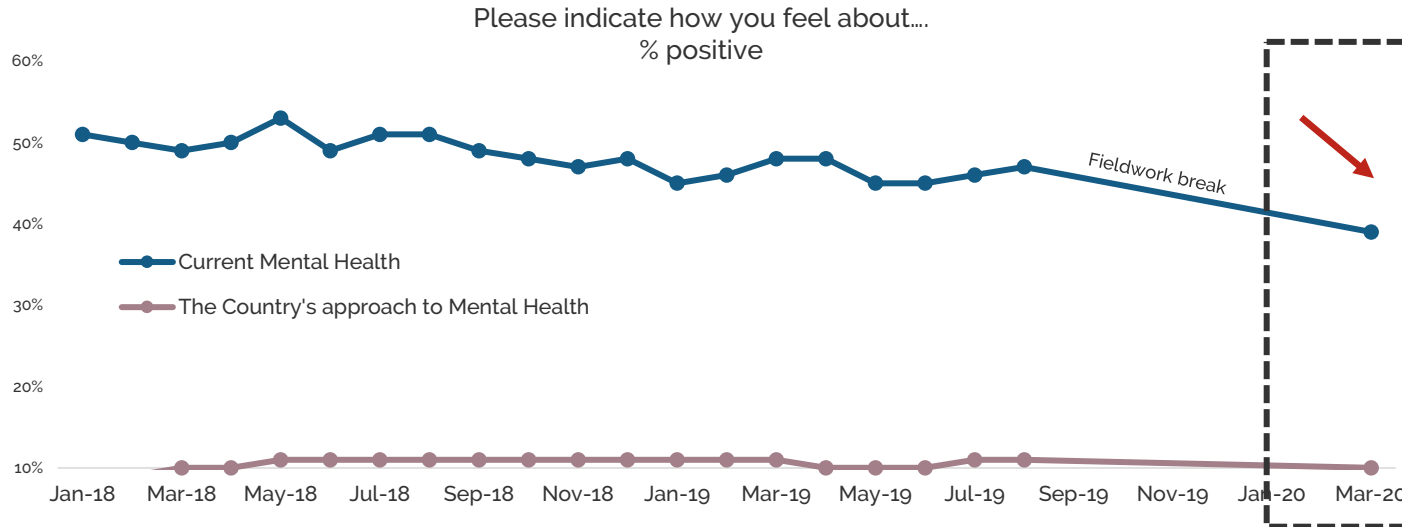
Mental Health has long been an important focus, both in the workplace and outside. Good mental health is often linked to having a good connection to people and a sense of certainty and control.

This is clearly at risk during this period of social distancing and self-isolation, and has seen the biggest decline of all measures from Sept-March. Only 1 in 10 consumers rate the country's approach to mental health as positive.

We know that seeking order from disorder can help in times like this. Brands need to be clear and concise and offer credible, factual information and provide reassurance. There is a space for brands to respond quickly to what people need now, to understand how people's priorities might have changed and fathom the potential new role they will need to play for consumers.

Mental health.

As social beings, we have a psychological need to feel part of something bigger and to share experiences with others. To help to stabilise attitudes to mental health and improve sentiment, there is a role for brands to bring togetherness and help to keep people connected. Emotional engagement is the key lever which will empower the nation and provide some familiarity and comfort in troubled times.

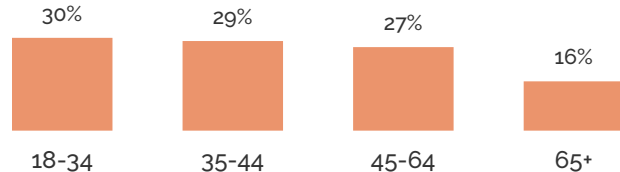


Financial uncertainty.

COVID-19 is going to have a big impact on the economy.

We asked our consumers how concerned they felt about their financial situation, and concern is much higher in the younger age groups. How brands talk to younger shoppers in the near future needs to take into account the fears and motivations of a group who were already feeling stretched and insecure.

Young generations that have grown up with all the information at their fingertips, likely now feel overwhelmed by information of which they can't determine the credibility.



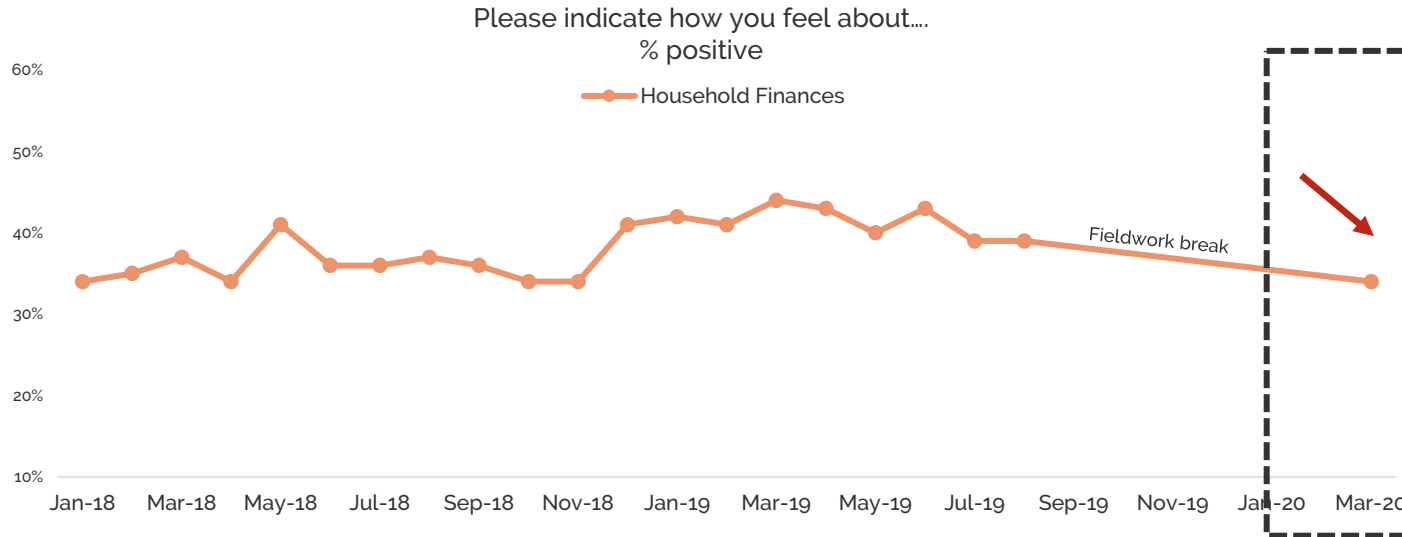
GETTING IT RIGHT

With so much uncertainty, banks are having to deal with their customers solely through telephone and online banking.

Barclays have launched a specific radio advertising campaign to reassure customers they can bank as usual through these channels, whilst reassuring that they'll ride the storm with its' customers.

Financial uncertainty.

Attitudes to finances haven't been this low since the end of 2018, when a vote of no confidence was called in parliament, and Theresa May announced she would step down after delivering Brexit. As the government continues to announce new funding to support households, will economic uncertainty increase? Households might be saving money on holidays and commuting, but with no certainty on when the crisis will end, they will only spend when confident in their decision. Small nudges like free delivery will help along the way.



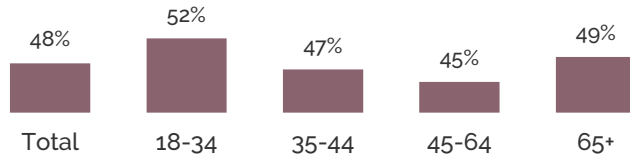
Personal hygiene.

We found that nearly half of the nation have already changed their general personal hygiene habits, amongst other behaviour. This is a remarkable outcome for something that can often be, under normal circumstances, a difficult thing to change.

From years of research in behavioural science, we know that humans are reluctant to change and that maintaining new behaviour can pose huge challenges. The very clear messages around hygiene have gone a great way towards effecting the change. The question now is will it be sustained and how do we support a long-term behaviour change?

Will enough time pass for the new behaviour to become a habit, or do we need further ways to simplify and incentivise good hygiene in order for this to stick? Could this be the famous "survival" response in action?

% saying they have changed their general personal hygiene habits



REPRIORITISING

Numerous brands have put their efforts into a new category, with alcohol brands from Brewdog to Anheuser-Busch creating hand gels.

Beyond the obvious candidates, Louis Vuitton also started creating hand gel to distribute.

The future.



It is hard not to feel that these are difficult times. If we compare our data vs last year (when all we had to worry about was Brexit and political uncertainty) we are already feeling significantly less positive vs last year.

There is a dip in how people feel about their current physical health, mental health and work prospects compared to last year. Are we surprised by this? Of course not.

But as an industry, marketing and insight must join forces to find ways to communicate and provide services that address this decline in our outlook and help people to navigate these difficult times.

We know that mental health is going to be a big priority, how can brands help in this given time?

Is there an area that can brands have a meaningful role in? These are questions that do not have an easy response or a quick fix, but we all need to reflect on this for the great impact that lockdown and absence of freedom will have in our lives

Messages that create feelings of positivity and hopefulness are important. But they must not come across as being insensitive. Authenticity is still key, as any non-genuine commercial movement of a brand could be extremely damaging.

Only marketing that is grounded in proper human understanding will be able to read the public mood carefully and in a timely manner will be able to activate behavioural change.

Things are changing fast at the moment, that's for sure, at a pace that nobody could have thought about before.

Therefore, pulsing the nation is more important than ever.

Stay safe and stay sane.

Contact us to add your customised questions and for full access to the study.

O U R O F F E R

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