



M A R C H 2 0 2 1

UNDERSTANDING THE NATION

Future Learnings from one year of the pandemic:
Combining behavioural science, neuroscience and long-term trends.

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In 2018, Walnut Unlimited started a syndicated tracking study, Understanding The Nation.

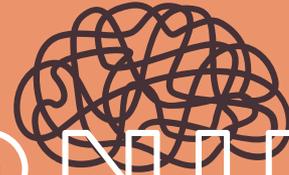
With so many things going on with Brexit, government changes, and environmental concerns, we wanted to track how the nation feels on a more emotional level through these times. We started tracking many aspects of life as we know it, including our emotional health, financial health, and behaviour.

However, March 23rd took us into lockdown – and big things started happening to our tracking data which took Understanding The Nation into a new realm – how do we really feel about the pandemic, what can brands do, and what does it mean to get out of lockdown ?

Read on for 7 key learnings on what has driven our emotions and what this means for the future.



KEY



LEARNINGS

**& WHAT THIS MEANS
FOR THE FUTURE**



M O O D O F

THE NATION

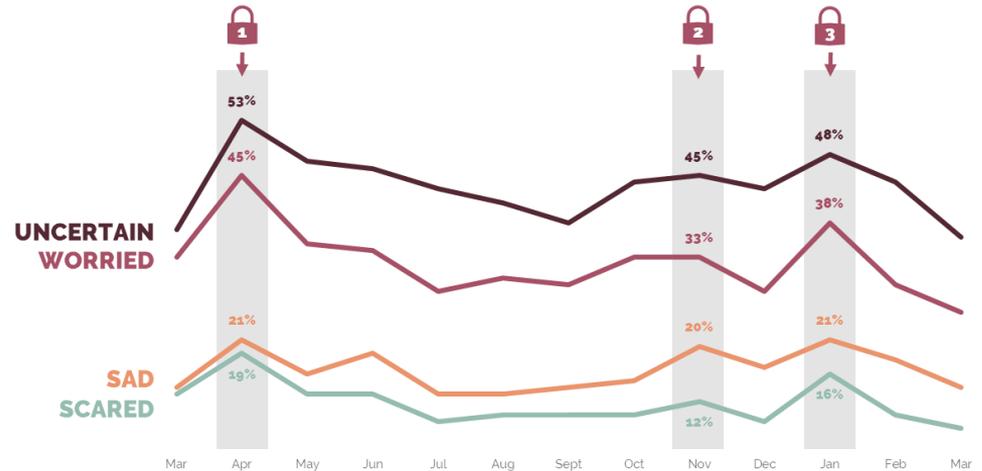
UNCERTAINTY

Back in the first lockdown, negative emotions of uncertainty, worry, sadness and fear spiked. As time went on and the pandemic became more of a normality, we began to adapt to our new reality and so did our emotional response.

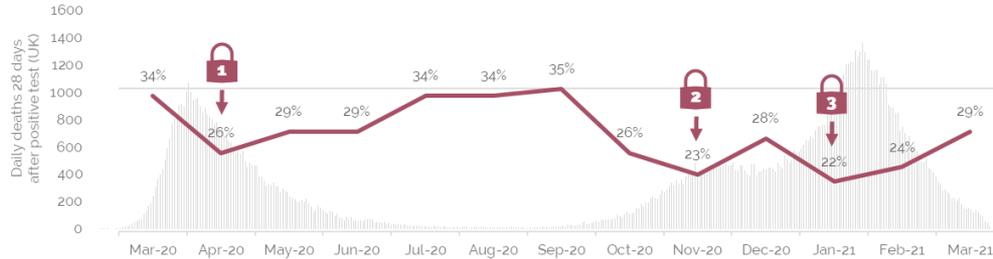
This is known as the adaptation effect – even after life-altering events, our emotions eventually re-calibrate and adjust.

We can see our emotions play out in the same way as the pandemic progresses – even as negativity peaks in response to new lockdowns and restrictions – it soon settles back down.

Our latest research at the beginning of March showed that negative emotions are finally **reducing**, which is great news and hopefully a sign that more positive times are on their way.



WHEN WILL POSITIVITY CATCH UP?

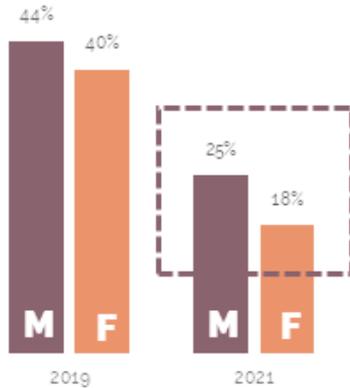


By using this measure of how positive people feel towards life in general, we can really see how people's overall feelings have changed throughout the pandemic. In general, we have unfortunately seen positivity towards our lives suffer as cases and deaths increase. We have also seen lockdowns taking a particular toll on the nation as these have forced us to pause our rituals and daily routines that ordinarily help us cope with daily life.

Linked to the decline in negative emotions we saw previously - with cases falling again, the vaccine program proving to be a success and a clearer roadmap out of the latest lockdown, we are starting to see positivity rise again. But if this year has taught us anything, it's that things can change very quickly!

It will be important for brands to continue to keep an eye on the nation's mood.

THE SHAPE OF OUR HAPPINESS HAS CHANGED



Whilst we've been tracking the nation's mood as one whole nation, we know that the pandemic has had a very different impact on different groups within society.

We can see this when we look at the differences in how positivity towards life in general has changed for men and women. Men's positivity towards life has dropped significantly, but so too has women's and the gap has widened between the sexes during the pandemic. We know for example that women are more likely to have been furloughed and are more likely to have taken more of a role in home schooling and this has clearly taken its toll.

THE SHAPE OF OUR HAPPINESS HAS CHANGED



We can also see different levels of impact for the different age groups.

Looking at Jan 21 data alone it looks as if the 75+ age group were feeling more positive due to their imminent vaccines. However, when we compare back to 2019, you can see that we used to see more variability in this measure between age groups, with the younger and older groups more positive than the middle-aged groups – **meaning it's these older and younger groups who have seen the biggest impact on their positivity.**

And that makes sense when we think of what these age groups have been through, with young people missing out on University, struggling to get first jobs, lack of nights out etc. whilst the older groups have been more likely to have to shield.

Affects not
only our
behaviours
but the way
we perceive
everything

M
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O
D

Match the
tone and
message with
the mood,
address it or
uplift it!



FUTURE LEARNING

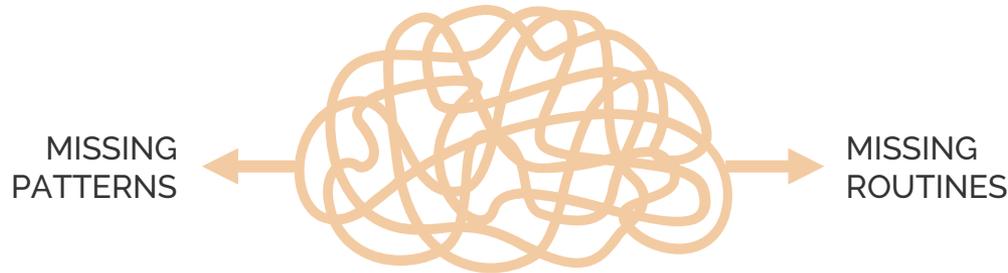
Use the mood of the nation to
determine when to shift the tone of
your communication



MENTAL
HEALTH



Our **BRAINS** are predictive machines



Our brains are looking for patterns and routines to help guide them. But since this outbreak, our brains have been missing these patterns and rituals they previously had relied on. To fill the void, we are looking to institutions, brands and services to inform us and provide clear guidelines in how we should be adjusting to the new normal. If anything, the large amount of uncertainty we've experienced this year means that now people require more clarity than ever before.

After lockdown 1 in particular, we saw that absence of patterns provoked a massive use of our energy, we felt drained and exhausted and the regularly changing guidance from the government unfortunately caused further dissonance and failed to provide the clear direction we craved.

Throughout the pandemic, the government has needed to react to changing situations, meaning that guidance and restrictions have changed frequently.

In fact, back in January, the Guardian reported that there had been a total of 64 changes in restrictions since the beginning of the pandemic.

Just Do It But Also Don't Do It



STAY HOME
▼
PROTECT THE NHS
▼
SAVE LIVES

CORONAVIRUS
ANYONE CAN GET IT
ANYONE CAN SPREAD IT
STAY HOME • PROTECT THE NHS • SAVE LIVES

IF YOU GO OUT,
YOU CAN SPREAD IT.
PEOPLE WILL DIE.

STAY HOME • PROTECT THE NHS • SAVE LIVES

STAY ALERT
▼
CONTROL THE VIRUS
▼
SAVE LIVES

Eat Out
— TO —
HELP OUT

ENJOY
Summer
SAFELY

LET'S GET BACK TO THE THINGS WE LOVE
LET'S GET TESTED

Test and Trace

FEELING UNWELL? GET A FREE TEST NOW. CALL 119 NHS.UK

CORONAVIRUS
STAY HOME TO HELP US SAVE LIVES

ACT LIKE YOU'VE GOT IT.
ANYONE CAN SPREAD IT.

STAY HOME • PROTECT THE NHS • SAVE LIVES

CORONAVIRUS
STAY HOME THIS BANK HOLIDAY WEEKEND
DON'T PUT YOUR FRIENDS AND FAMILY IN DANGER.

STAY HOME • PROTECT THE NHS • SAVE LIVES

LOOK HIM IN THE EYES

AND TELL HIM THE RISK ISN'T REAL.

Tony Covid-19 patient

STAY HOME • PROTECT THE NHS • SAVE LIVES

CATCH-UPS COST LIVES

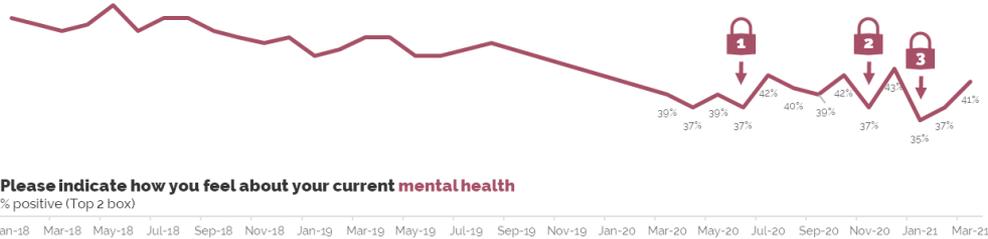
Don't bend the rules.
The new COVID-19 variant is spreading fast, and around 1 in 3 people with coronavirus don't have any symptoms.

STAY HOME • PROTECT THE NHS • SAVE LIVES

HANDS **FACE** **SPACE**

The high levels of energy we've been expending to try and process all the changes to our lives and the general worry we've been experiencing by living through a pandemic have all unfortunately taken their toll on our mental health.

MENTAL HEALTH POSITIVITY REMAINS LOWER THAN PRE-PANDEMIC.



Please indicate how you feel about your current mental health
% positive (Top 2 box)

Our data has shown that mental health has been quite turbulent since lockdown 1, taking dips with each lockdown. Unfortunately, we can also see that even when we've seen small signs of recovery, the nation's mental health has remained consistently lower than before the pandemic.

Whilst the factors contributing to these low levels of positivity towards personal mental health are wide ranging, there is an element of uncertainty weaved throughout many of them.

For example, stress around job security and personal finances are driven by the uncertainty of what will happen with the economy and how restrictions will impact different sectors.

And the lack of human interaction that we crave as social animals is impacted by the uncertainty of when we will be able to see our friends and loved ones again.



FUTURE LEARNING

Explore how your brand can give
the nation a mental health boost



**WIDEN ING
SOCIETAL
DIVISIONS**

THE ECONOMIC DIVIDE

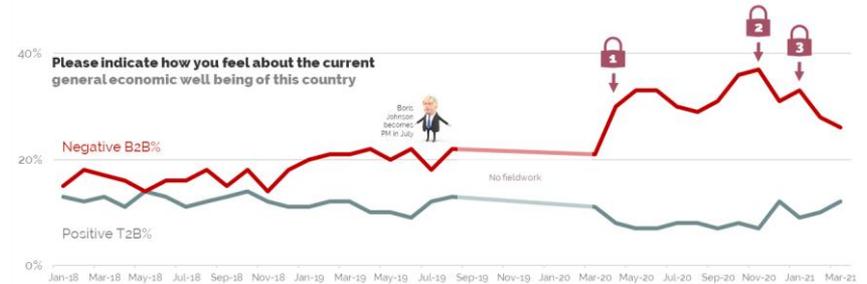
W I D E N S

Using the measure 'general economic well-being of this country' we can see that pre-pandemic there was not much of a gap between how people felt about our economy with positive and negative tracking at similar levels.

The divide became slightly wider through Brexit negotiations in 2019 and as Boris became prime minister in the summer.

1 year into the pandemic, the gap between positivity and negativity is very wide, showing us that there are two sides to every crisis - those who are well and with secure jobs, and have become the 'accidental savers' of the pandemic and those who have less security and certainty in their economic outlook and are having to budget or face the collapse of a business.

In February, negativity towards the economy reduced for the first time since the pandemic. Even in the midst of an economic recession, small glimmers of hope on the horizon (through the vaccine and the government roadmap), can have a large shift on mindset.





FUTURE LEARNING

Tailor messages to be sensitive to
your audience's economic outlook



THE



VACCINE



IMPLICIT REACTION TIME

When we are thinking about our route out of feeling uncertain about the world around us, implicit measurement can be a useful tool. The vaccine is obviously in the news A LOT right now and concerns about supply, protectionism, and batch delays is dominating the news. We've seen that news of the vaccine had a big impact on how we felt, and our uncertainty about life.

So let's think back a year – to a time when the vaccine was just a distant hope.

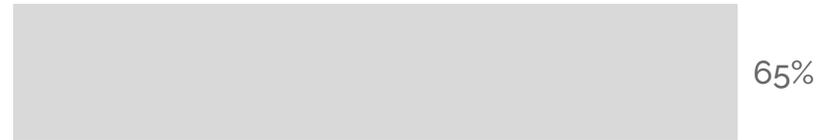
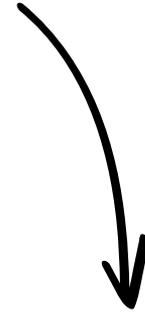
We conducted a global study using implicit reaction time testing to see if we could determine how people really felt in different countries about a possible vaccine. For an emotive topic such as our own health, we needed to go **beyond** what people say.

**Explicit
agreement
tells us one
thing...**

COVID-19 scares me

NO YES

HARD TO TELL

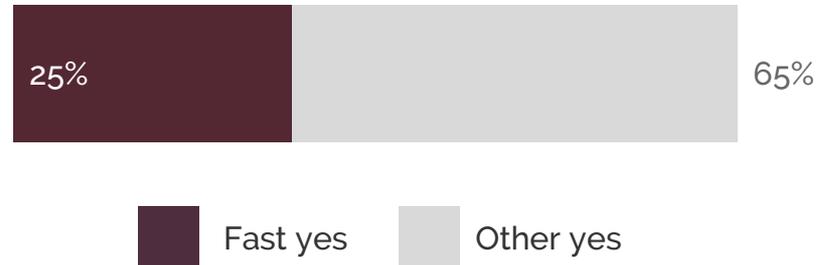
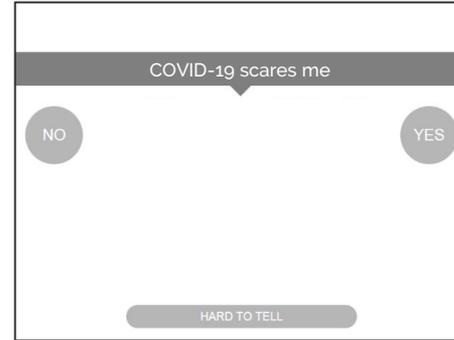


■ Total yes

...but speed tells us the certainty of response

By overlaying how quickly people respond to questions, we can gauge how **certain** they feel of their answer.

It is not that people are lying to us when they say 'yes', more that they do not have the introspection into the underlying associations that truly drive their behaviour.



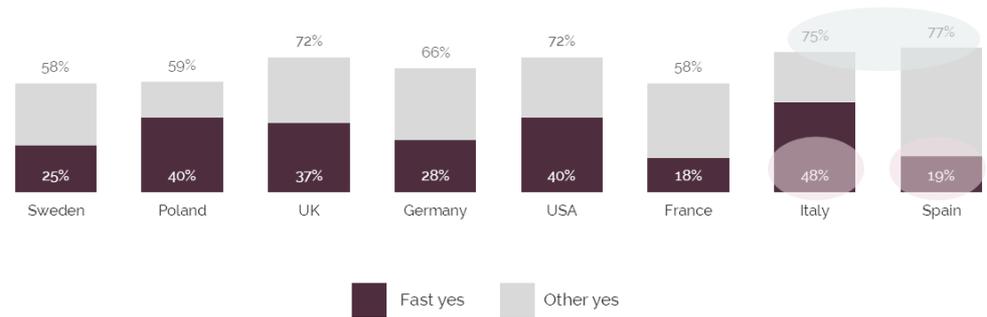
VACCINE UNCERTAINTY

Last year, before a vaccine was even a reality, people were already really mixed in their attitudes as to whether they would even like to be vaccinated.

For example, in June 2020, we saw that there were differences – looking at different countries, Spain and Italy were the most likely to want to be vaccinated, but implicit scores showed there was a huge difference between those two countries in terms of how certain they were.

Today we see that those who have received the vaccine in the UK show much stronger positivity in general – as this rolls out, we should expect to continue to see this shift in mindset.

Like to be vaccinated when a COVID-19 vaccine is available



Attitudes towards
vaccines were
weak as the
reaction time data
showed

Behavioural shortcuts can
help to nudge people and
reduce uncertainty,
making messages more
effective





FUTURE LEARNING

Be careful in trying to reinvigorate
confidence

A dark blue rectangular banner with the Ryanair logo in the top right corner. The text "JAB & GO!" is written in large, bold, yellow capital letters in the center. Below it, in smaller yellow capital letters, is "1 MILLION SEATS FROM £19.99".

RYANAIR

JAB & GO!

1 MILLION SEATS FROM £19.99

Brands need to tread carefully as the vaccine is rolled out. Brands need to need to reinvigorate confidence in a **sensible way**.

This is an extreme example from a RyanAir campaign in December that got blocked by the ASA, but it is easy for brands to mis-step as we come out of lockdown and enter recovery.

Using clear, consistent insight such as those contained in Understanding the Nation, can help to prevent misjudgments in tone and emphasis along the way..

BEHAVI♡URAL

SCIENCE



So really at the heart of all of this is human behaviour...

Brands have had to react quickly during the pandemic in response to consumers' shifting mindsets, causing many to reassess how they make decisions and on what basis they create content.

This has led to a bigger interest in behavioural science, because the universal principles can be applied quickly and consistently.

Whenever we want to change behaviour these universal learnings can help brands to nudge consumers towards the change.

This isn't an easy challenge.

Status Quo and Defaults Bias show that people are inclined to keep things as they are. We stay with what we know, what we have done before, or what seems like the easiest or default option. I'm sure we can all relate to this – particularly when it comes to our weekly grocery shopping list or meal plan for example. If we're trying to get someone to change their behaviour, they will need a compelling reason and actionable steps to achieve this.



At Walnut we have our own behavioural science framework – Shortcuts. This simple, go-to framework brings together key thinking from behavioural economics, psychology and the wider social sciences. Each pillar includes universally agreed principles of human behaviour. We use this to identify cognitive biases which we can influence, and so can formulate motivational territories that really resonate with consumers.



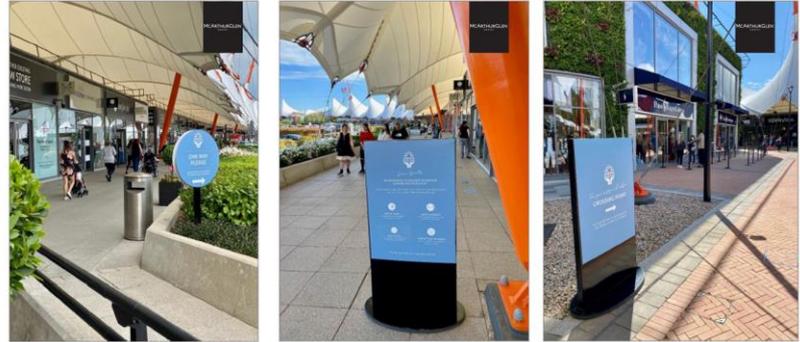
We apply our framework to help brands optimise interventions and nudge behaviour change... This is particularly topical given the changes that society and consumers are going through as we experience a cycle of lockdowns and easing restrictions. And so we wanted to share a quick example of how this can be relevant.

As we emerged from lockdown 1.0, we closely worked with McArthurGlen to optimise their comms. As a group that operate shopping centres, they are a great example of a brand who had to make quick decisions on how to communicate key messages of safety and reassurance in a way that was in-keeping with their brand, so they turned to behavioural science to explore how to elevate their communications.

In this example, we focus on the Flow pillar – making it easy for consumers. We firstly unpicked how the use of logos and themed colours created a **consistent** campaign, that make it easy to follow throughout the shopping centre, but also is familiar in terms of their brand assets.

An example of how we recommended they further optimise comms was to use a single-minded message across touchpoints, reinforced with visual icons to deliver instant meaning even when shoppers might not read the detail. This taps into fluency bias, Which shows that the faster we are able to process new information, the more open we are to it. Small tweaks like a clearer font, stronger contrast or even lowercase letters have been proved to impact how easy to read a certain text is.

This is just one example of how brands are using behavioural science to not only reassure consumers in the retail space and create a sensation of safety, but also to retain a familiar brand image that taps into all the things their visitors love about the retail environment





FUTURE LEARNING

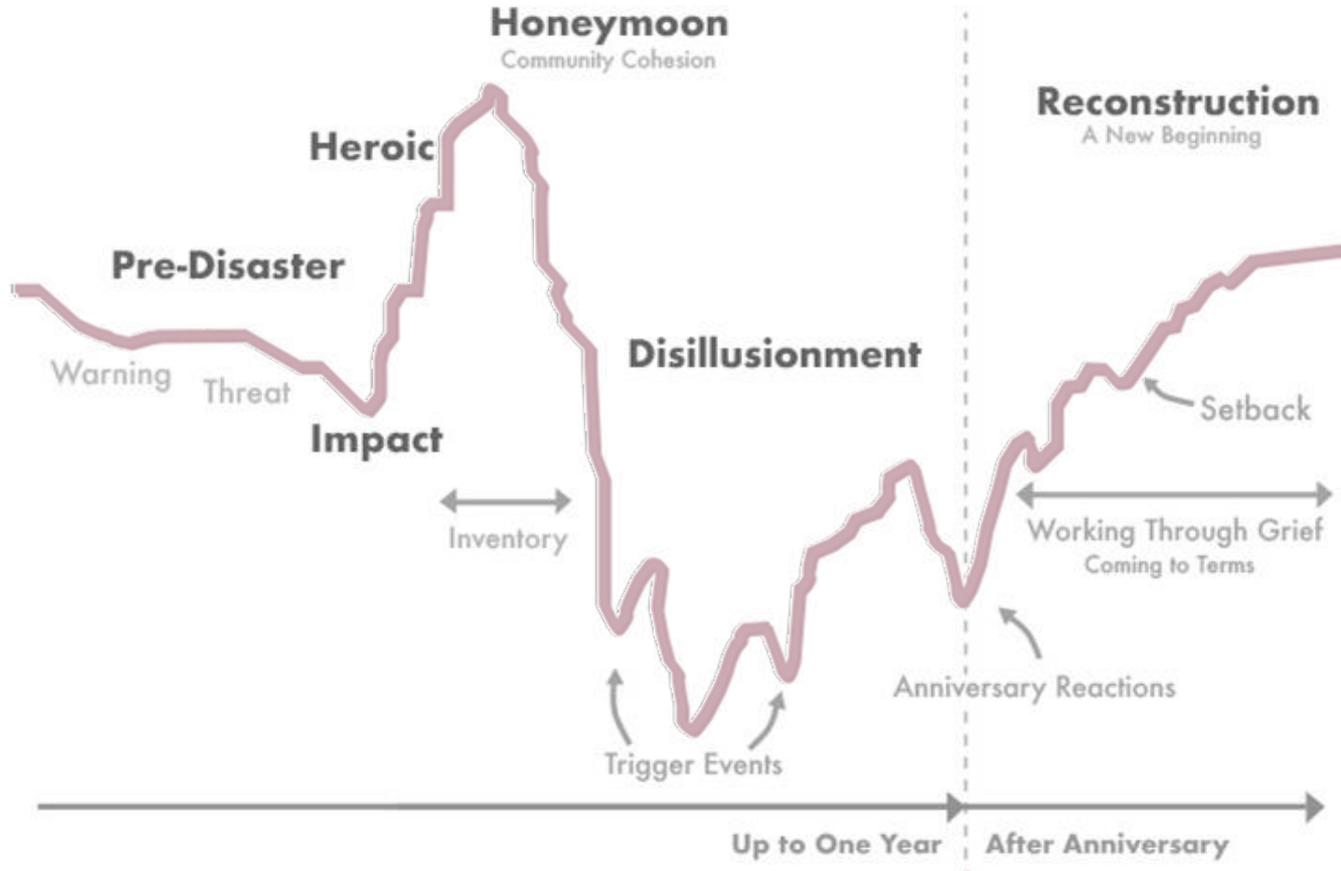
Behavioural Science is a powerful
tool to nudge future behaviour



A NEW



BEGINNING



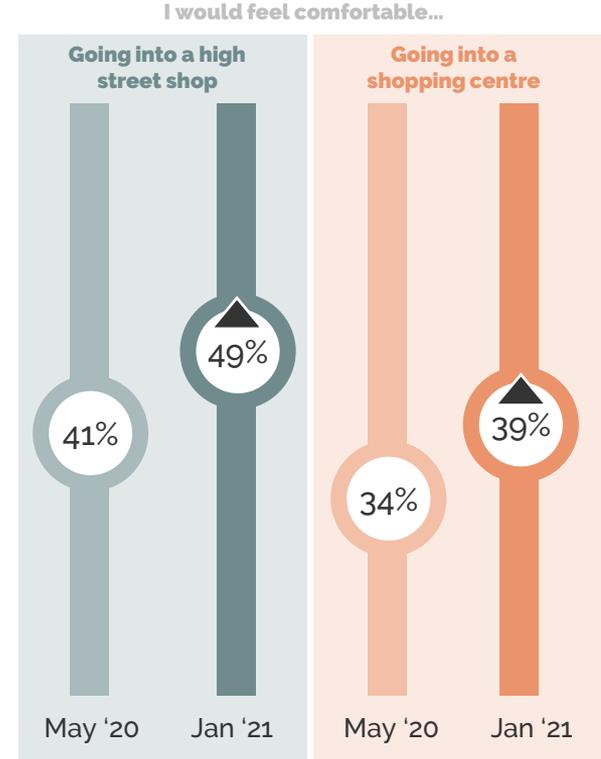
THE GREAT RETAIL RETURN

In May 2020 last year, within work that we did on behalf of Retail Week at that time, we monitored how comfortable people felt about returning to the high street and to shopping centres.

As we approach the end of lockdown 3, we can see that shoppers have become significantly more comfortable with returning to high street shops and shopping centres after this 3rd lockdown.

And whilst there is still some apprehension about returning to stores, shoppers now know what to expect from shopping.

This is great news for retailers and a great sign of what our new beginning could hold, but given some are still apprehensive about returning, what can retailers do to drive traffic back to their stores?



▲ Significantly higher



FUTURE LEARNING

Remind us of the joy of shopping!

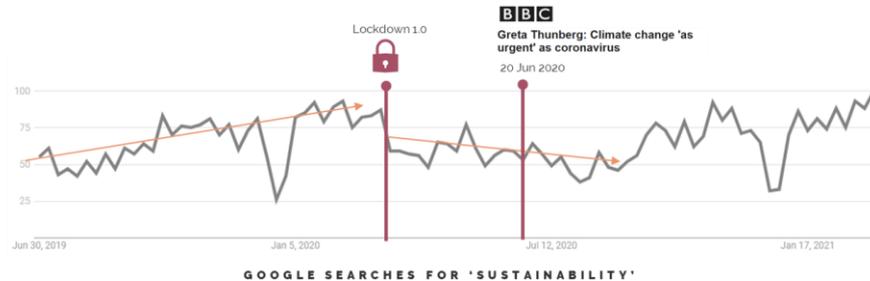
WAL
NUT



SUSTAINABILITY

The word "SUSTAINABILITY" is rendered in a yellow, outlined font. Each letter is decorated with various nature-themed icons: a sprig of leaves on the 'S', a daisy on the 'A', a clover on the 'I', a daisy on the 'B', a sprig of leaves on the 'L', and a daisy on the 'Y'. A large, light blue outline of the number '5' is positioned behind the text, extending from the top left towards the bottom right.

ACTIVE INTEREST DIPPED WHEN COVID HIT - SIGNS OF RECOVERY THIS YEAR...



SOURCE: Google Trends UK data
Indexed against peak.

Our human experiences of vulnerability, both emotional and physical, can make messages around a greater good more resonant than ever before

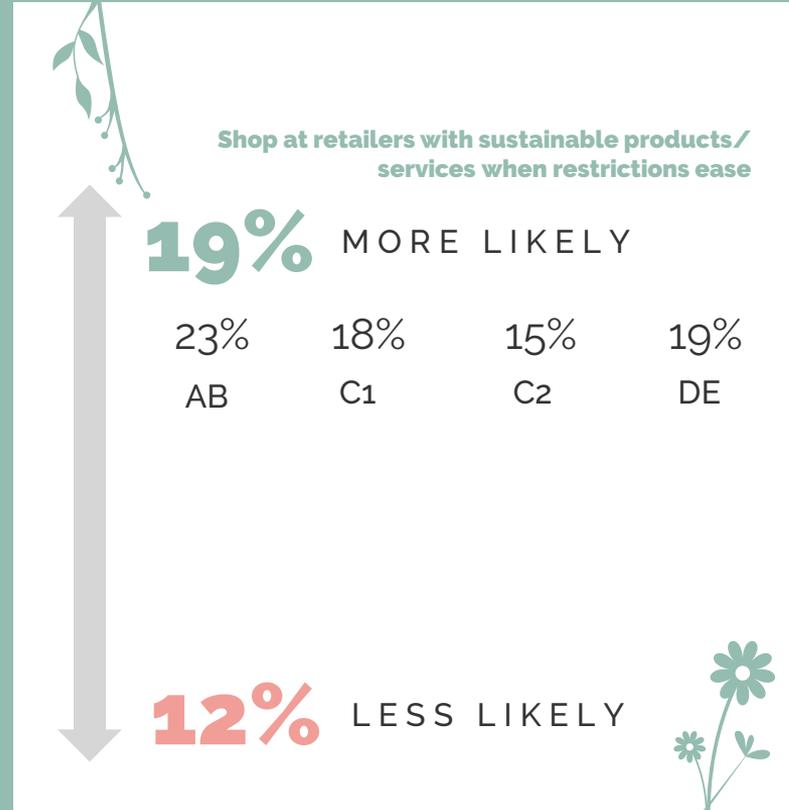
So, is it now a good moment for brands to take the sustainability flag as a cause? We've seen many brands push this topic in the last few months in particular...

When the pandemic hit, sustainability was immediately de-prioritised. Our world became one of disposable masks, gloves, PPE, hand sanitiser, rather than focusing on reduce, reuse, recycle and avoiding single use plastic.

After gaining momentum, traction stalled as priorities shifted. We saw coffee shops do a 180 and turn to disposable cups rather than reusable ones. As consumers became more hygiene-focused, packaging became a very tangible way to reduce risk and visibly show safety was a consideration.

This timeline shows active Google searches for sustainability over this period. Even at this superficial level growth throughout 2019 was immediately flattened as lockdown hit the UK. As the world rushed to reduce the impact of COVID, Greta Thunberg highlighted the need to treat climate change with the same urgency. Reassuringly, interest has picked back up. However, the question remains how much do consumers want to be actively involved in the sustainability conversation versus simply having the reassurance that brands are doing the right thing – making it easy for them to feel good about their decisions.

SUSTAINABILITY IS STILL IMPORTANT, BUT RISKS BEING DE-PRIORITISED

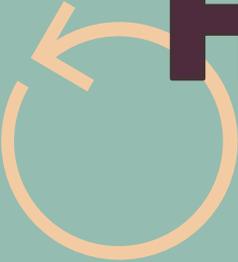




FUTURE LEARNING

Make it easier to make
sustainable choices

DO BRANDS NEED TO

 **HIT RESET?**

RECOMMENDATIONS



Improve
mood and bring
celebration/
rebirth tone



Be where
people are



Show care for our
mental health

RECOMMENDATIONS



Reinvigorate
confidence in
spend again



We need
reminders



Make human
experiences easy,
reduce frictions,
reduce pain



Fulfil the need of
escapism &
socialising

RECOMMENDATIONS



Tell a consistent
story across
touchpoints



Find ways to talk
about 'the greater
good' e.g.
sustainability

1 MOOD OF THE NATION

2 MENTAL HEALTH

3 WIDENING SOCIETAL DIVISIONS

4 THE VACCINE

5 BEHAVIOURAL SCIENCE

6 A NEW BEGINNING

7 SUSTAINABILITY

WAL
|
NUT



THANK YOU