



spark
emotions

Mood of the Nation

Getting to the truth of how
UK consumers are really feeling
about the month ahead

December 2022

spark emotions **Getting to the truth of how the UK is feeling**

Spark Emotions is a global insight agency with a **world class team of behavioural psychologists and industry experts.**

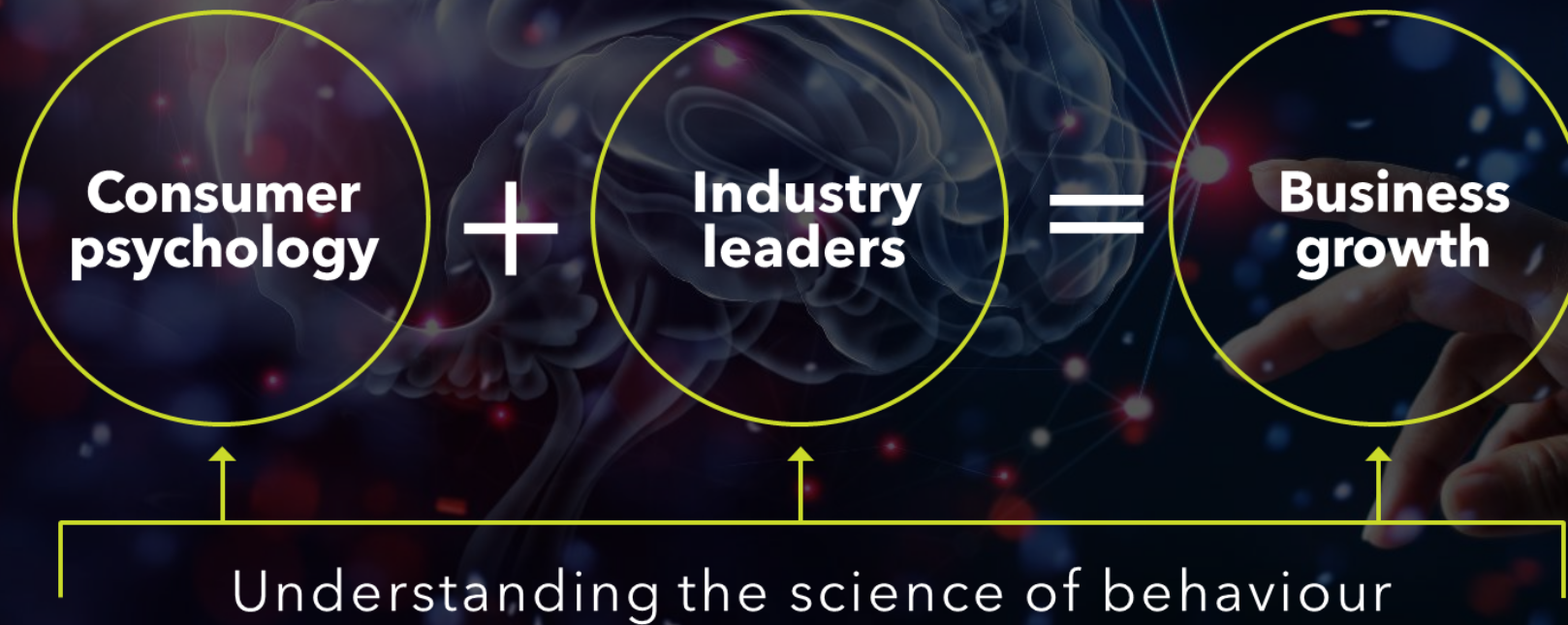
By combining the power of cutting-edge research techniques, scientific human behavioural understanding and market expertise, we help our clients grow and thrive. Our pioneering approach to insight gives you **an understanding of your customer's behaviour**, allowing you to serve up engaging and innovative solutions.

Every month, we will be speaking to 1,000 people in the UK to understand how they are truly feeling about the month ahead. Using our unique Spark Emotional Wheel, we will be able to **quantify the emotions of the nation.**

We will gain a broad read of how the nation is feeling with a particular focus on three or four of the most important topics to your customers.



We are a team of **consumer psychologists** and **industry leaders** that help you grow your business by **understanding the science** behind human behaviour



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1/

Mood of the nation

A new Prime Minister is announced in the UK as COP27 kicks off

We conducted a nationally representative survey of more than 1000 people to get to the truth of how the nation is really feeling during these turbulent times.

There were a number of events that would have impacted the mood of the nation.



We are experts on the brain

- System 1 & 2
- Internal & external motivation
- Salience & attention
- Emotion & reason
- Implicit & explicit
- Working memory
- Actual vs. claimed



We can quantify emotions

Our Spark Emotional Wheel allows us to plot the emotions of shoppers and consumers by measuring 3 implicit levels within their minds:

Pleasure - How happy they feel

Excitement - How mentally stimulated (in a good or bad way) they feel

Control - How in control they feel

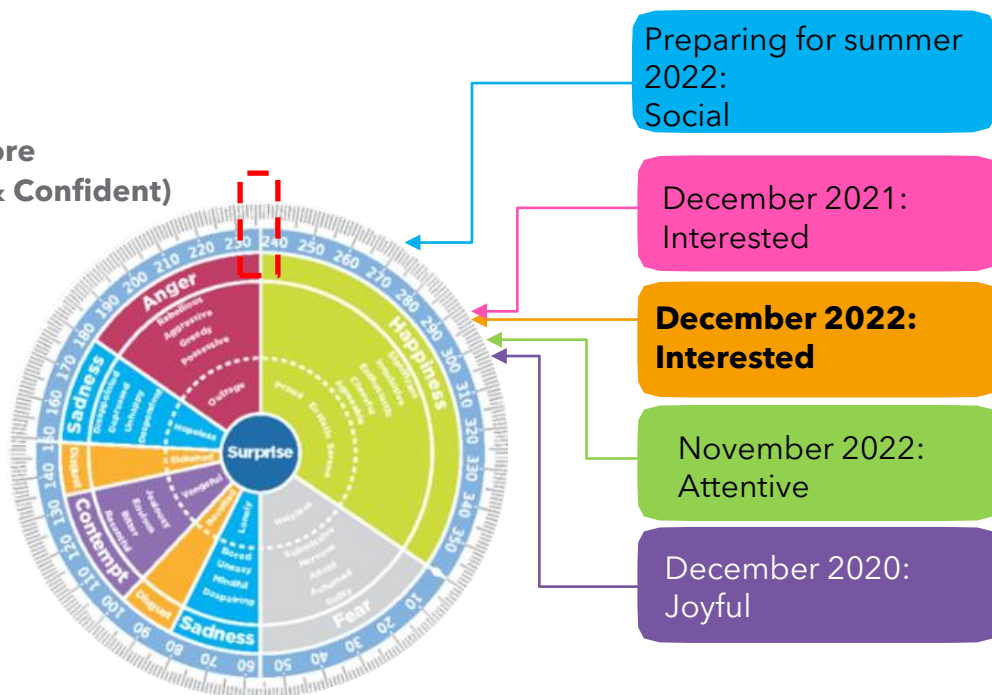


We get to **actual, not claimed, behaviour**, getting to **the truth is critical**

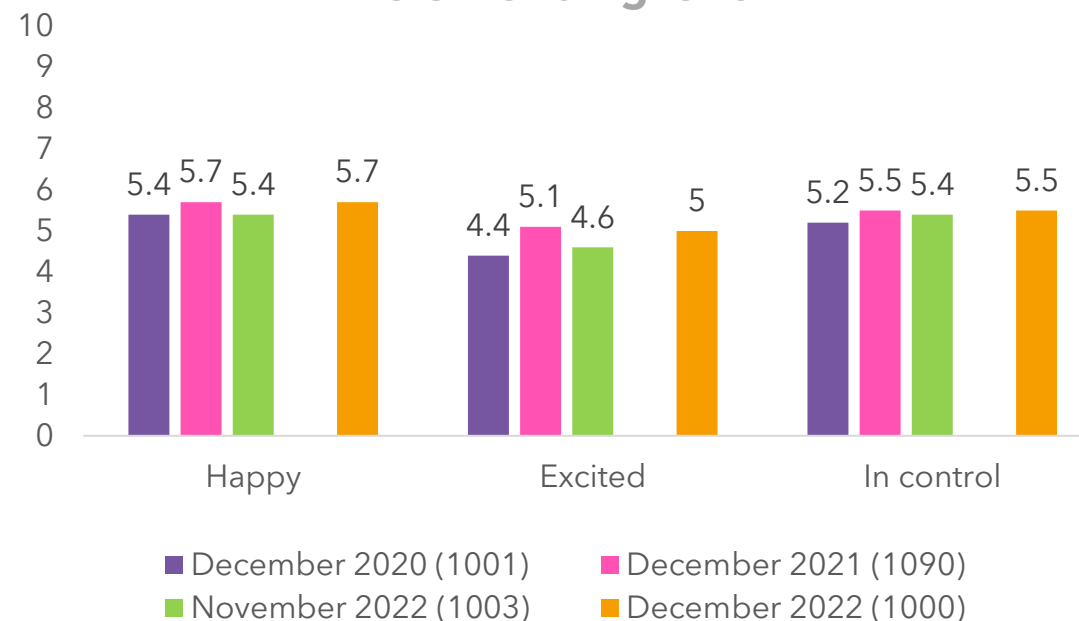
UK adults are feeling happier and more excited this month compared to last

- Compared to this time last year, emotional scores have remained the same
- We have seen an improvement in feelings of excitement and happiness this month compared to last. This is likely to be a result of the upcoming festive period, however these scores are still quite low compared to other events we've experienced this year such as the lead up to summer

Ideal score
(Proud & Confident)



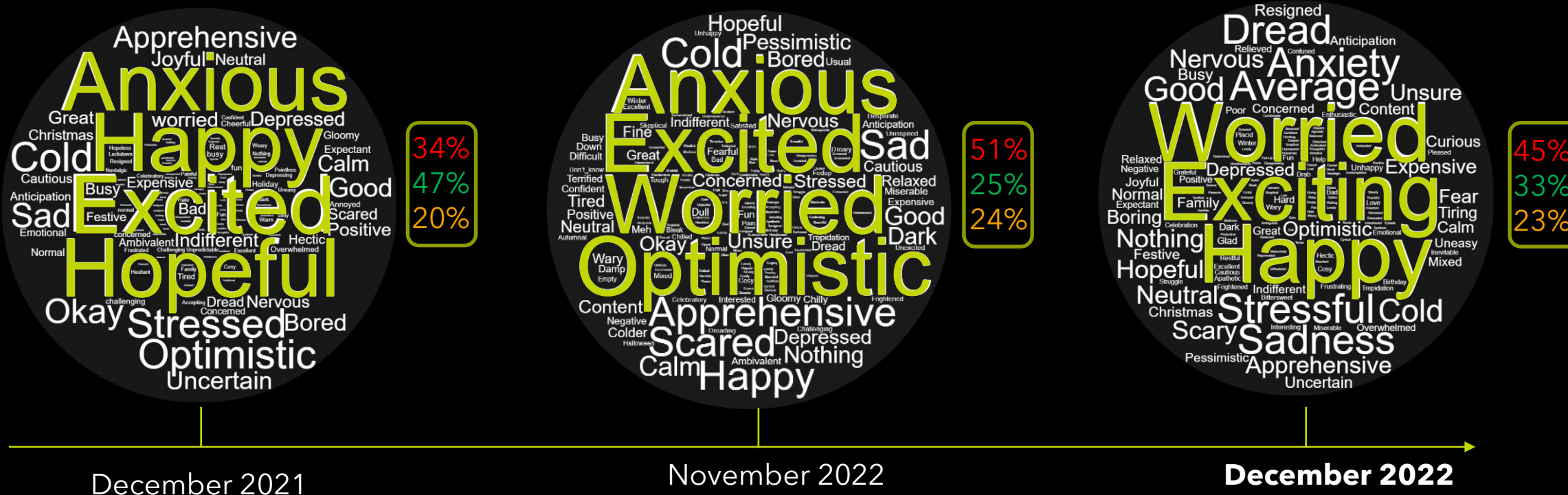
Please indicate how you feel about your whole world right now:



This scale consists of a number of words that describe different feelings and emotions. Please indicate how you feel about your whole world right now. Happy; Excited; In control (1 = not at all, 10 = very).

UK adults are feeling more positive this month compared to last

Please describe how you feel about the upcoming month in one word or emotion (N:1000)



Response Analysis:

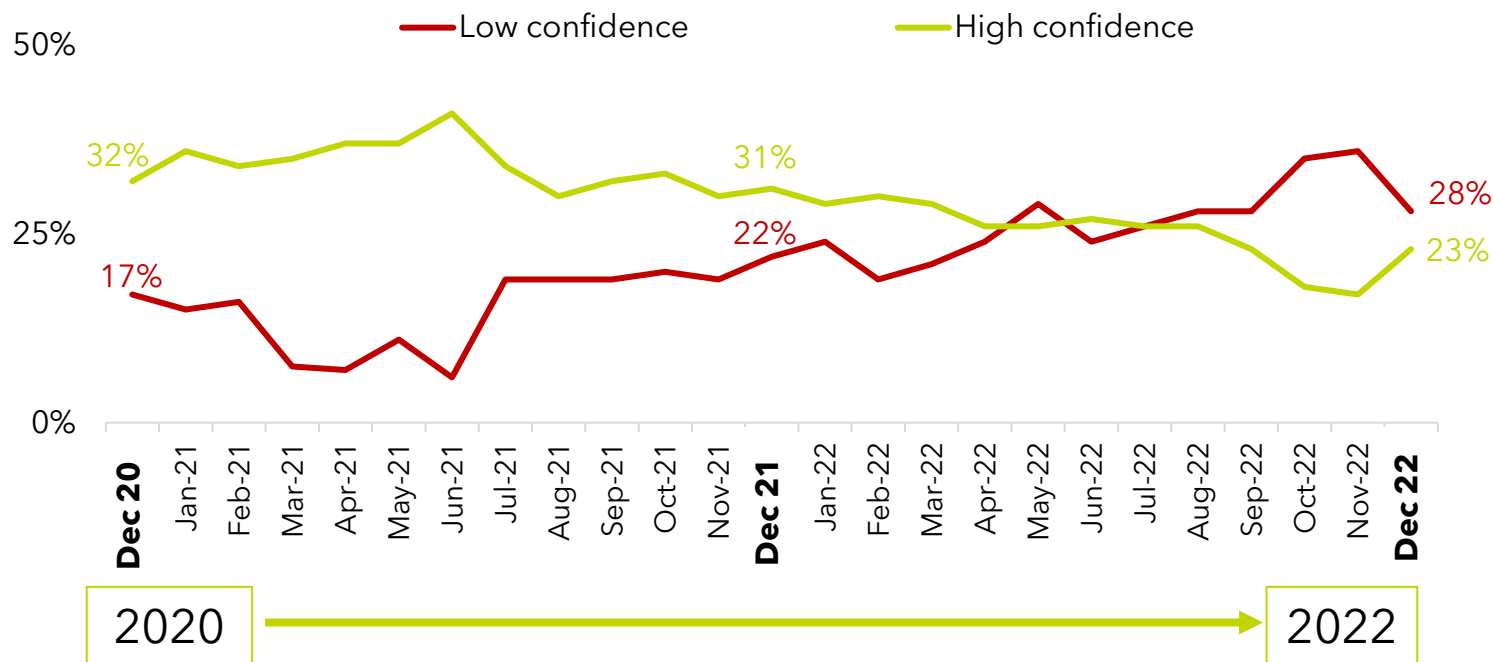
Negative
Positive
Neutral

Please describe how you feel about the upcoming month of December in one word or emotion.

Financial confidence has risen for the first time in 6 months for UK adults, but remains low

- There has been a rise in UK adults with high financial confidence and a drop in those with low confidence
- UK adults may feel they have more control over their finances as they can start to organize budgets for Christmas and energy prices are capped until April

Financial confidence across the last 2 years



Extent that the cost-of-living crisis is negatively impacting your life (N:1000)

45%
High impact

50% 40%

18%
Mild impact

37%
Low impact

How can you help?

Although financial confidence has increased this month, UK adults will still be looking for cost-saving methods so continue to highlight deals/promotions

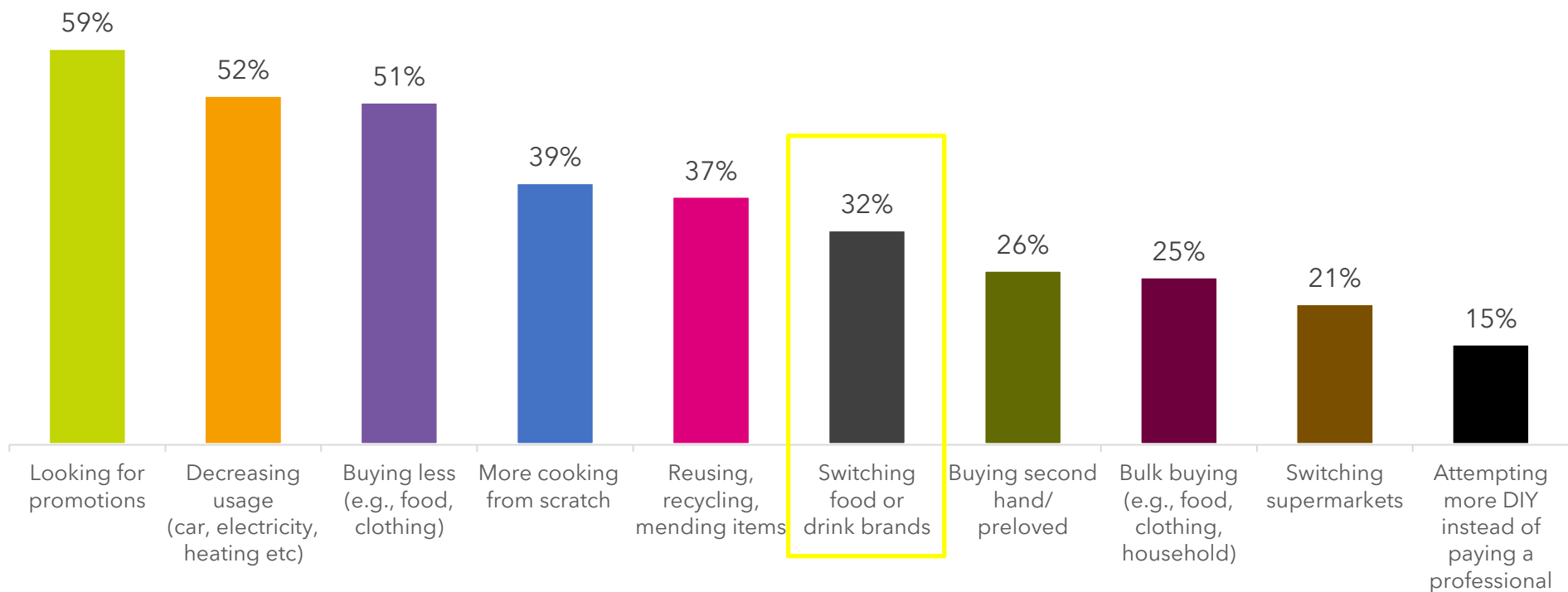
How confident are you about your finances in the month of **December**? (1=not at all, 10=very)

To what extent do you think the current cost-of-living crisis will negatively impact your life in **December**? (0= very little/ no effect 10= large effect)?

Brands need to work hard to prove their value to customers as 1 in 3 will be switching to save money

- Actively looking for promotions and decreasing usage are the most popular strategies for saving money so when UK adults come to do their Christmas shop, price bundles and promotions will be high on the agenda

Strategies for saving money in December (N: 1000)



Which of these strategies for saving money are you likely to do in the month of December? (multiple choice)



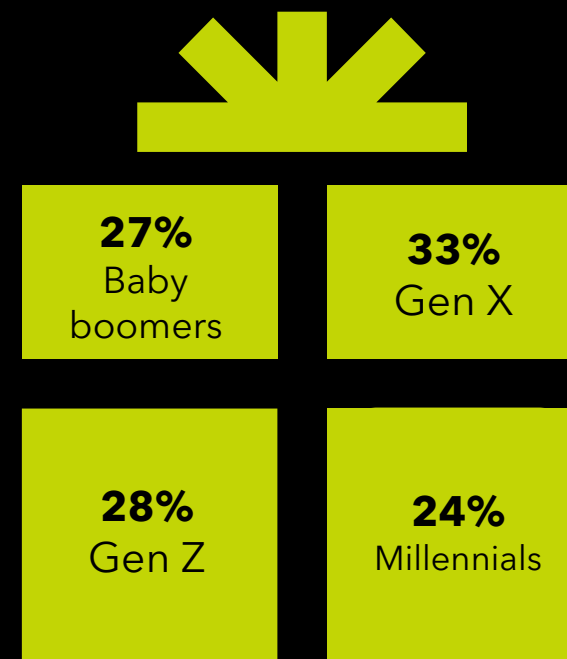
How can you help?

Use messaging to highlight your brand's value for money, USP and quality to help maintain customer loyalty

% of each Generation who opted
for Gifts as most prominent



December 2022
(N:1000)



Mood of the nation

Heading into Christmas, financial confidence in the UK has risen after 6 months of decline



Emotions

UK adults are feeling happier and more excited this month compared to last.

Levels of anxiousness has fallen this month compared to last and compared to last December when uncertainty was high.



Finances

UK adults with high financial confidence has risen by 6%pp from last month.

Nearly 1 in 3 UK adults are still reporting having low financial confidence.



Saving/ Spending

Gifting is the top purchase this month, with Christmas approaching.

With the increase in bills, UK adults will continue to look for promotions and decrease usage to save money.



2/

Christmas & New Year's Eve

spark emotions Christmas & New Year's

Last Christmas, COVID-19 restrictions were lifted, and we found out how people were planning to do their Christmas shopping.

This year with the increase in energy prices and cost-of-living, we wanted to know how much people are planning to spend over Christmas, their top considerations when buying presents, and how they plan to cook their Christmas meal.

We also find out what people have planned for New Year's Eve.



Less than half of UK adults have started gift shopping

- This suggests that UK adults have other priorities such as paying bills on their minds and Christmas shopping is taking a back seat for many

Have you started your Christmas shopping yet? (N: 1000)



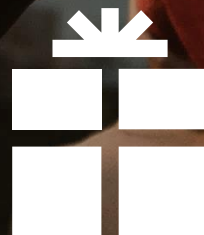
43%

Have not started



57%

Have started



42%

Have started buying gifts



13%

Have started buying food



8%

Have started buying decorations

How can you help?

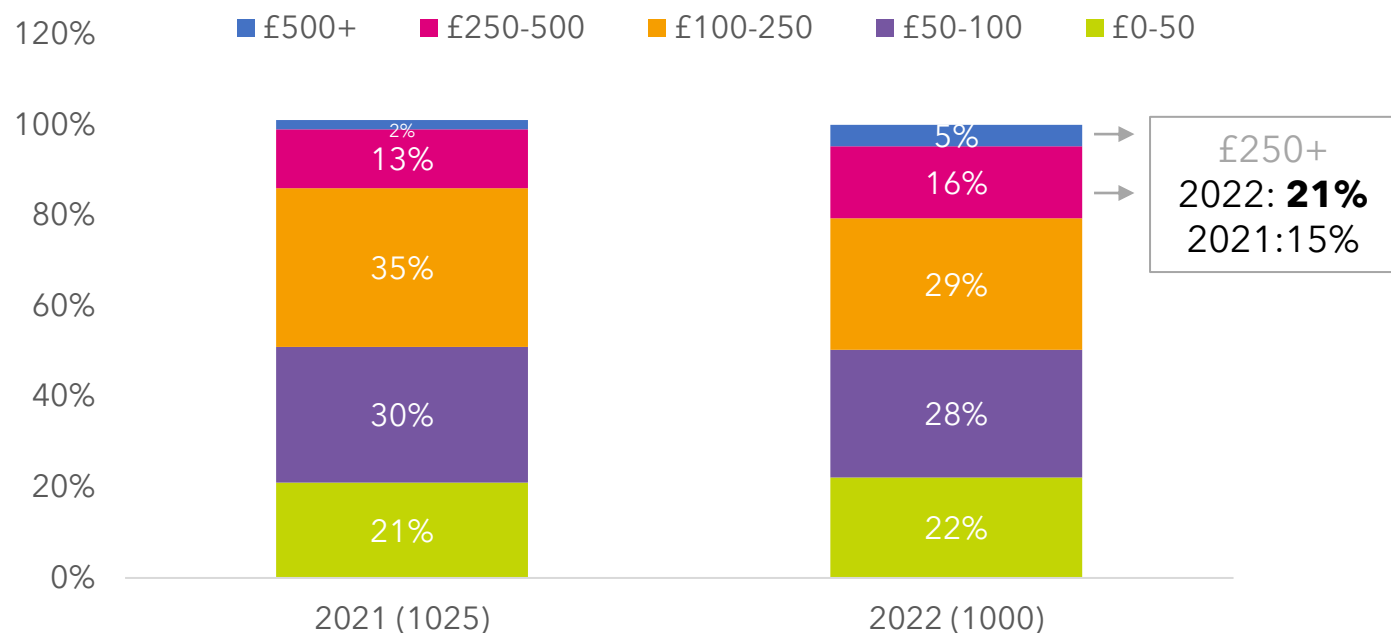
Price bundles and promotions will be high on the agenda to help to keep costs down for Christmas food shops, so highlighting these offers to consumers is key

Have you already started your shopping for Christmas? (Multiple choice)

Expected spend on food/drink this Christmas has increased this year compared to last

- 21% of UK adults are expecting to spend £250 and above this Christmas on food/drinks, this has increased from 15% last year - likely due to perceptions of overall price increases rather than a conscious decision to spend more
- 1 in 4 of UK adults from ABC1 group expect to spend £250+, which is significantly more than those from C2DE

Expected spend on food and drink over Christmas period



25% of
ABC1
Expect to
spend £250
and above

15% of
C2DE
Expect to
spend £250
and above

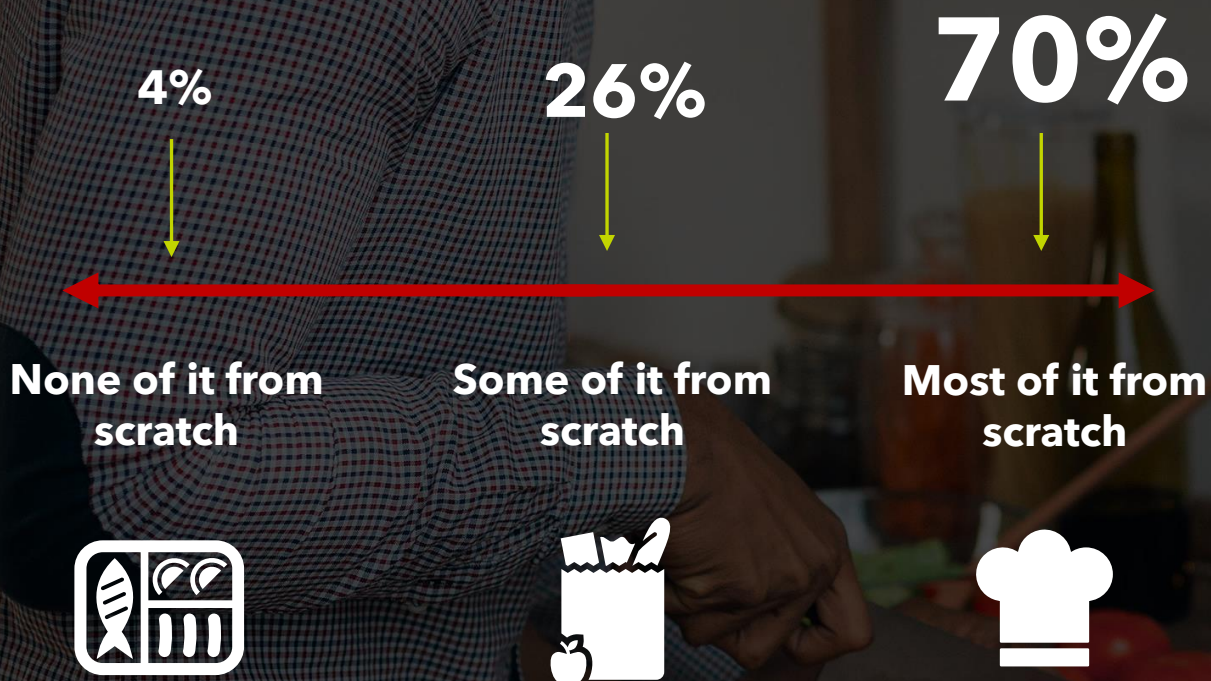
How much (£) do you expect to spend on food and drink for the Christmas period this year?

Note: ABC1 group = those categorized as middle class based on occupation and C2DE group = those categorized as working class based on their occupation

Almost 1 in 5 UK adults say they will be using an air fryer to cook their Christmas dinner

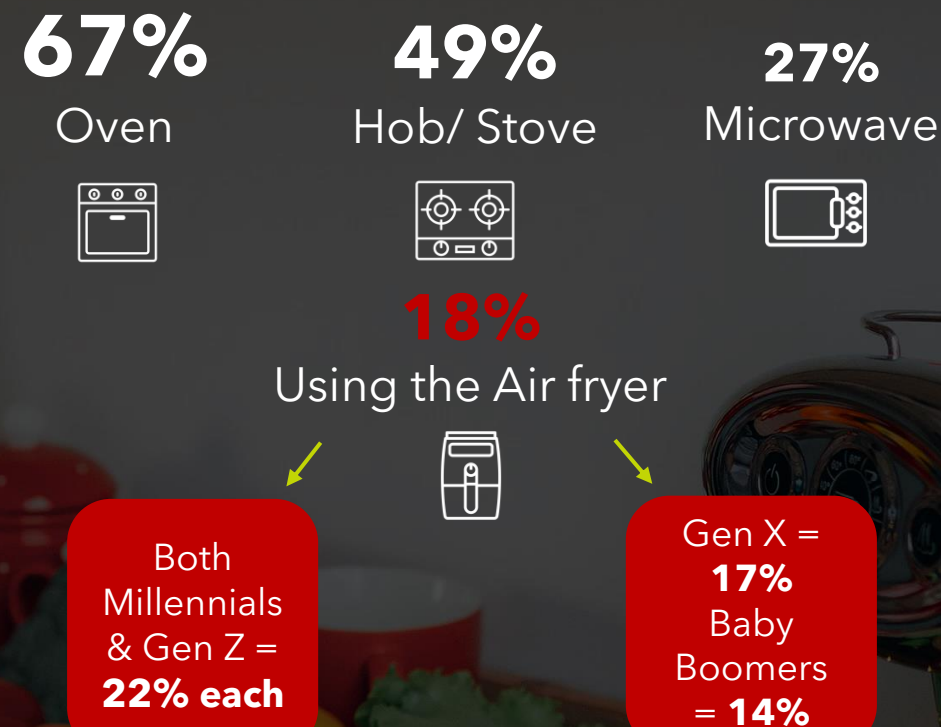
- The majority of those celebrating Christmas will be cooking most of their Christmas dinner from scratch, so shoppers will be looking for inspiration and recipe cards, especially for these new alternative methods of cooking e.g., air fryer- friendly recipes

Plans to prepare Christmas meal (N: 902)



In your household, how will you prepare and cook your Christmas dinner? (Multiple response)
How likely are you to cook your Christmas dinner from scratch?

Appliances used to prepare Christmas meal (N: 902)



- 
- Planned spending on gifts compared to 2021
(N: 902)
- | Spending Change | Percentage |
|-----------------|------------|
| More | 9% |
| The same | 53% |
| Less | 38% |
- Do you plan on spending more, less or the same on gifts this Christmas compared to last year?
Describe how you feel about Christmas shopping in one word or an emotion

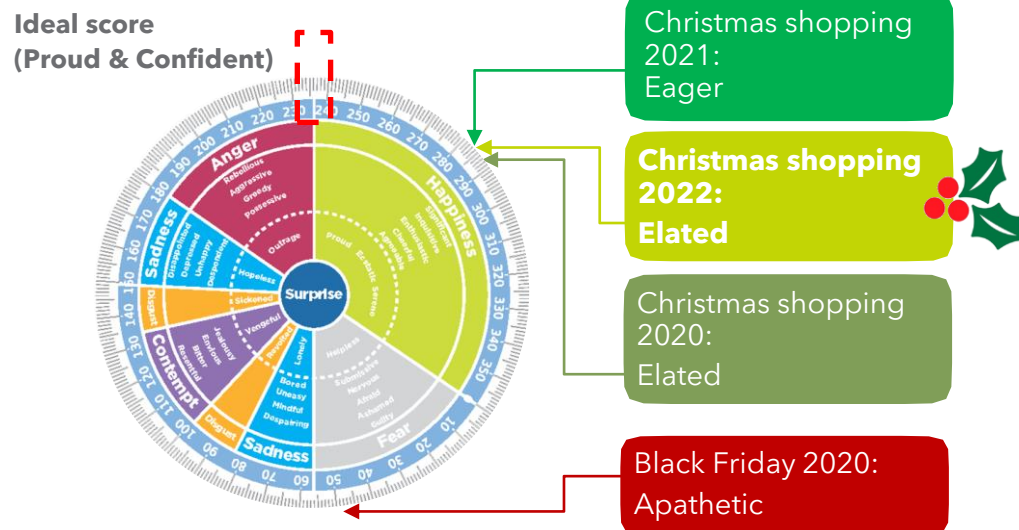
[illegible]

33%
56%
10%

29%
59%
12%

UK adults have similar feelings towards Christmas shopping regardless of what's going on around them

- Despite Covid and cost-of-living, UK adults' feelings towards Christmas shopping has been relatively static, but retailers could do more to help shoppers feel happier and more in control of the Christmas shopping experience this year

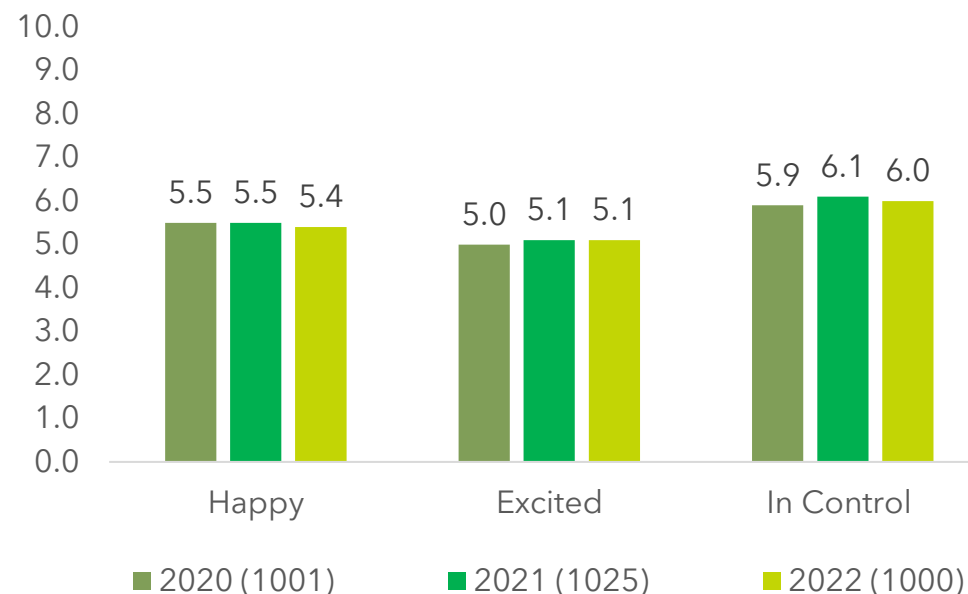


How can you help?

To elicit emotional responses from shoppers, show imagery and signage of happy faces and Christmas occasions

This scale consists of a number of words that describe different feelings and emotions. Please indicate how you feel when thinking about Christmas shopping (1 = not at all, 10 = very)

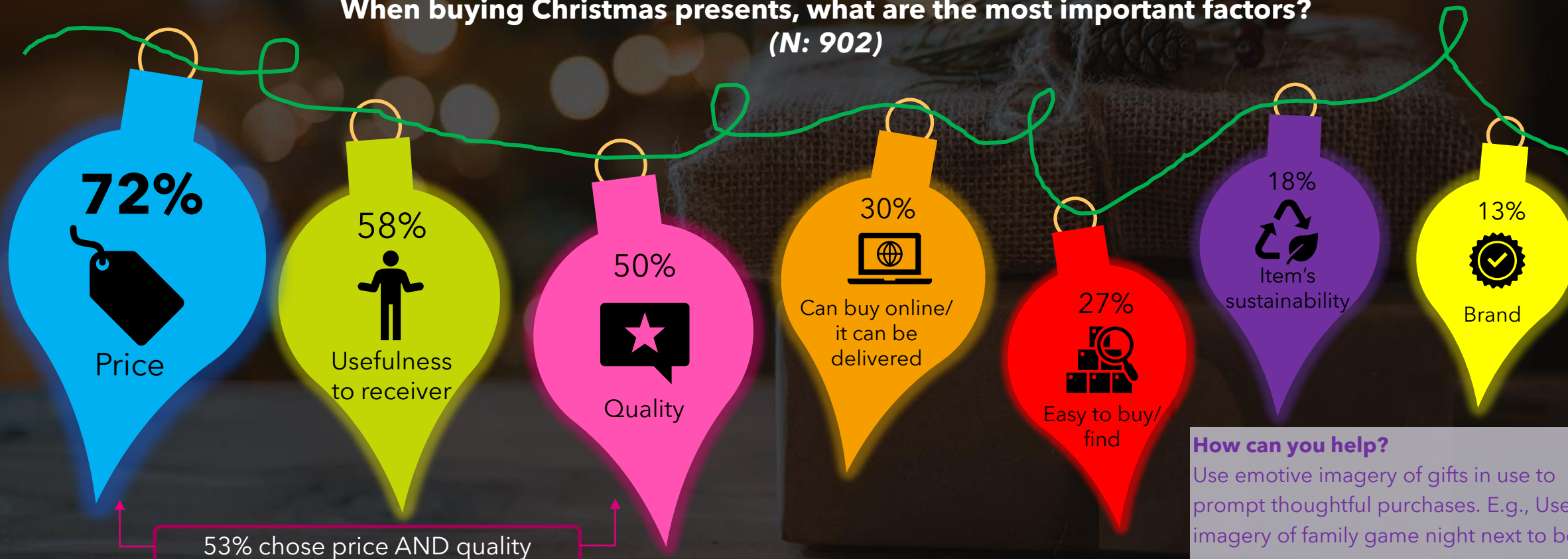
Please indicate how you feel about Christmas Shopping:



Price is the top consideration when buying Christmas gifts

- Over half of UK adults will have the receiver in mind when purchasing Christmas gifts so use messaging that reassures shoppers that their receiver will love/enjoy/use their gift

When buying Christmas presents, what are the most important factors?
(N: 902)



How can you help?

Use emotive imagery of gifts in use to prompt thoughtful purchases. E.g., Use imagery of family game night next to board games

When buying presents for Christmas this year, what are the most important factors you will consider? (multiple choice)

Most UK adults will be doing the majority of their Christmas shop online

Where will you purchase Christmas presents from?
(N:902)

23%

All Online



25%

Mostly Online



Those with low financial confidence are more likely to buy online (56%) compared to those with high confidence (45%)

26%

Both



15%

Mostly In-store

11%

All In-store



How can you help?

Online is perceived to have better offers than in-store so ensure social media marketing highlights deals/offers instore leading up to Christmas to drive store footfall

Where will you shop for the majority of your Christmas presents? (Sliding scale from all online to all in-store)

Amazon is a clear winner for online Christmas shopping and supermarkets are a convenient channel

Where will you purchase Christmas presents from?



26% of those gift shopping in-store will purchase from supermarkets

- ✓ Convenient
- ✓ Easy 'one-stop-shop'
- ✓ Considered to be value for money

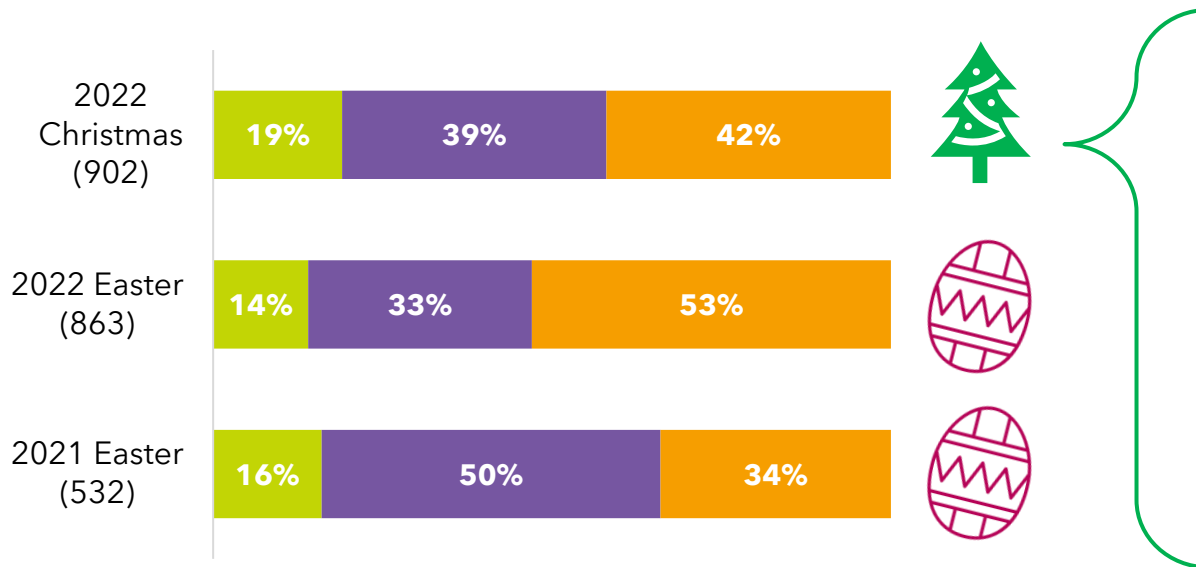
Where will you shop for the majority of your Christmas presents? (open response)
Responses <1% are not shown

Even with the current financial climate, sustainability is important for most UK adults this Christmas

- Although price is unsurprisingly the top consideration when purchase Christmas gifts, UK adults will still be looking for signs of sustainability, especially younger generations so ensure sustainability messaging is obvious and transparent
- Sustainability has become more important to UK shoppers in 2022 compared to 2021

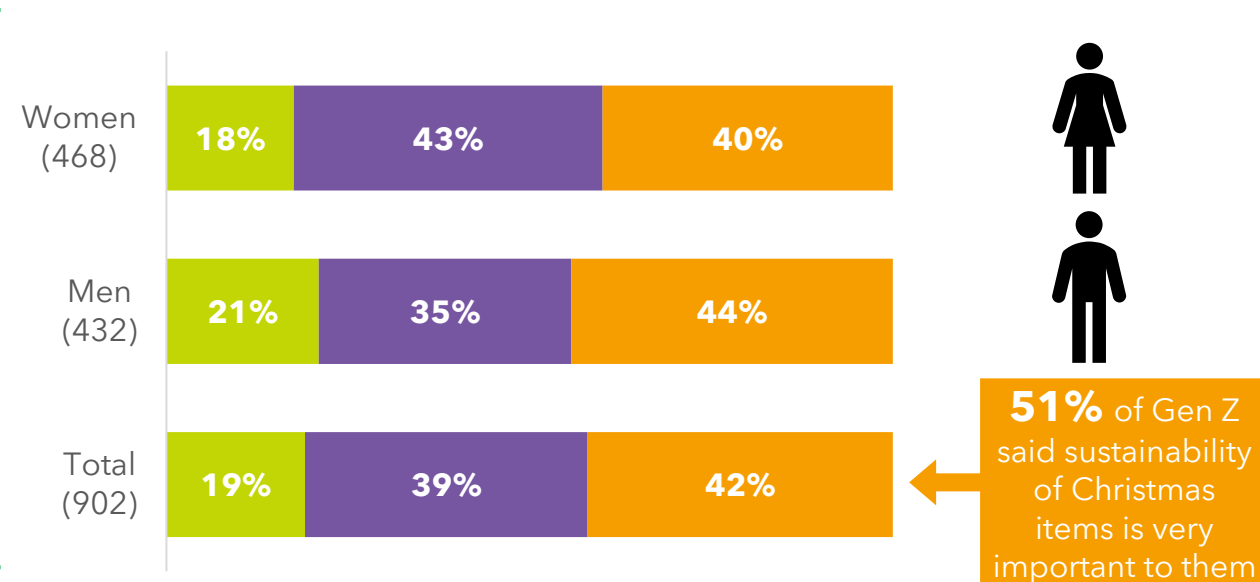
Importance of sustainability at Easter and Christmas *(asked in our previous MOTN Reports)*

Low Importance Mild Importance High Importance



Importance of sustainability this Christmas (2022)

Low Importance Mild Importance High Importance

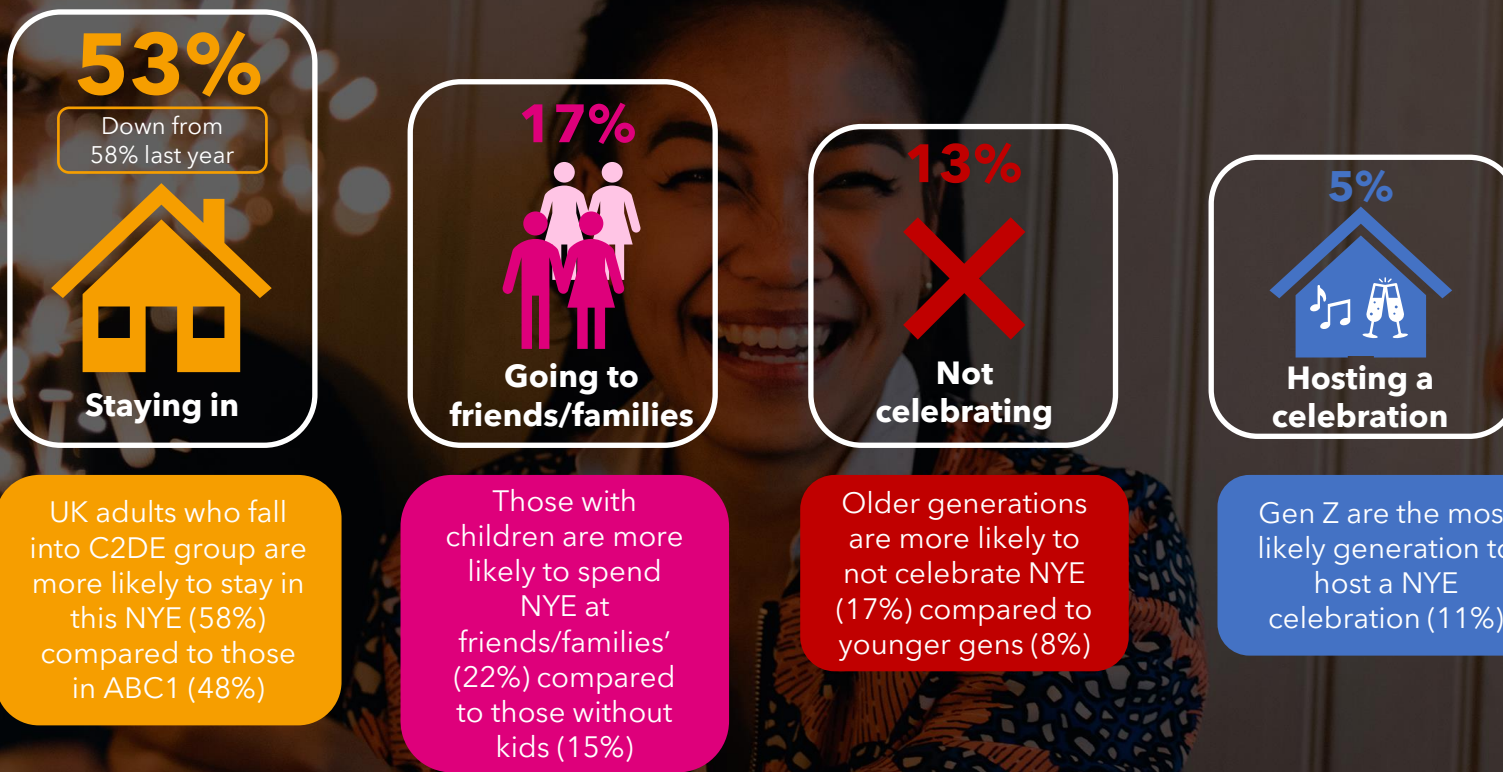


How important is it that the items (gifts/decorations/food packaging etc) you buy for Christmas have been packaged sustainably?

1 in 2 UK adults will be staying in this NYE, so prompt the home celebration occasion

- Younger generations are more likely to celebrate NYE and 1 in 10 Gen Zs will be hosting their own NYE party, so think about this demographic when promoting party food/drink

What do you plan to do on New Year's Eve? (N: 1000)



How can you help?

Use secondary sitings in-store to prompt NYE snack and alcohol purchases during weekly food shops

What do you plan to do on New Year's Eve?

Note: ABC1 group = those categorized as middle class based on occupation and C2DE group = those categorized as working class based on their occupation

Christmas 2022 will see UK adults saving money and budgeting where they can



Christmas Shopping

UK adults are expecting to spend more on food/drink for Christmas this year compared to last, as inflation hits a 40 year high in the UK. Almost 2 in 3 UK adults feel negatively towards Christmas shopping, with a mix of stress and worry as well as happy and excited.

Provide gift inspiration depending on the receiver e.g., 'xmas gifts for mum'



Christmas Food

Christmas dinners will mostly be made from scratch and almost 1 in 5 UK adults say they will be using an air fryer when cooking to help save money.

Educate shoppers on ways to efficiently cook their food over the Christmas period, this will also help your brand to connect/relate to shoppers



NYE Plans

1 in 2 UK adults will be staying in this NYE, so prompt the home celebration occasion in store and younger generations are more likely to celebrate NYE.

Emphasise the big night in occasion this December with imagery to encourage shoppers to purchase snacks/drinks for NYE at home

A photograph of an elderly couple walking hand-in-hand on a misty mountain trail. The woman is wearing a beige jacket and a yellow scarf, and the man is wearing a dark jacket and a grey scarf. They are both looking towards the right. The background shows rolling hills covered in dense forest with autumn foliage in shades of orange, yellow, and green. A layer of mist or fog hangs between the hills. The sky is overcast and grey.

3/ Summary

spark emotions Executive Summary



MOTN

- UK adults are feeling happier and more excited this month compared to last
- Financial confidence has risen for the first time in 6 months for UK adults
- But UK adults will still be looking for ways to save money this month, especially by looking for promotions and reducing usage



Christmas

- UK adults are expecting to spend more on food/drink for Christmas this year compared to last, as inflation hits a 40 year high in the UK
- Christmas dinners will most be made from scratch and almost 1 in 5 UK adults say they will be using an air fryer when cooking to help save money



NYE

- More people will be leaving their homes to celebrate NYE this year compared to last
- But still 1 in 2 UK adults will be staying in this NYE, so prompt the home celebration occasion in store
- Younger generations are more likely to celebrate NYE compared to older generations

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- Every month, we send out our Mood of the Nation for free, if you'd like to receive it directly to your inbox sign up by clicking on the link below

<https://sparkemotions.com/join-our-mailing-list/>





Thank you for reading

The team at Spark Emotions who brought you the December edition of Mood of the Nation combined industry expertise with consumer psychology to help get to the truth of how the nation is feeling.



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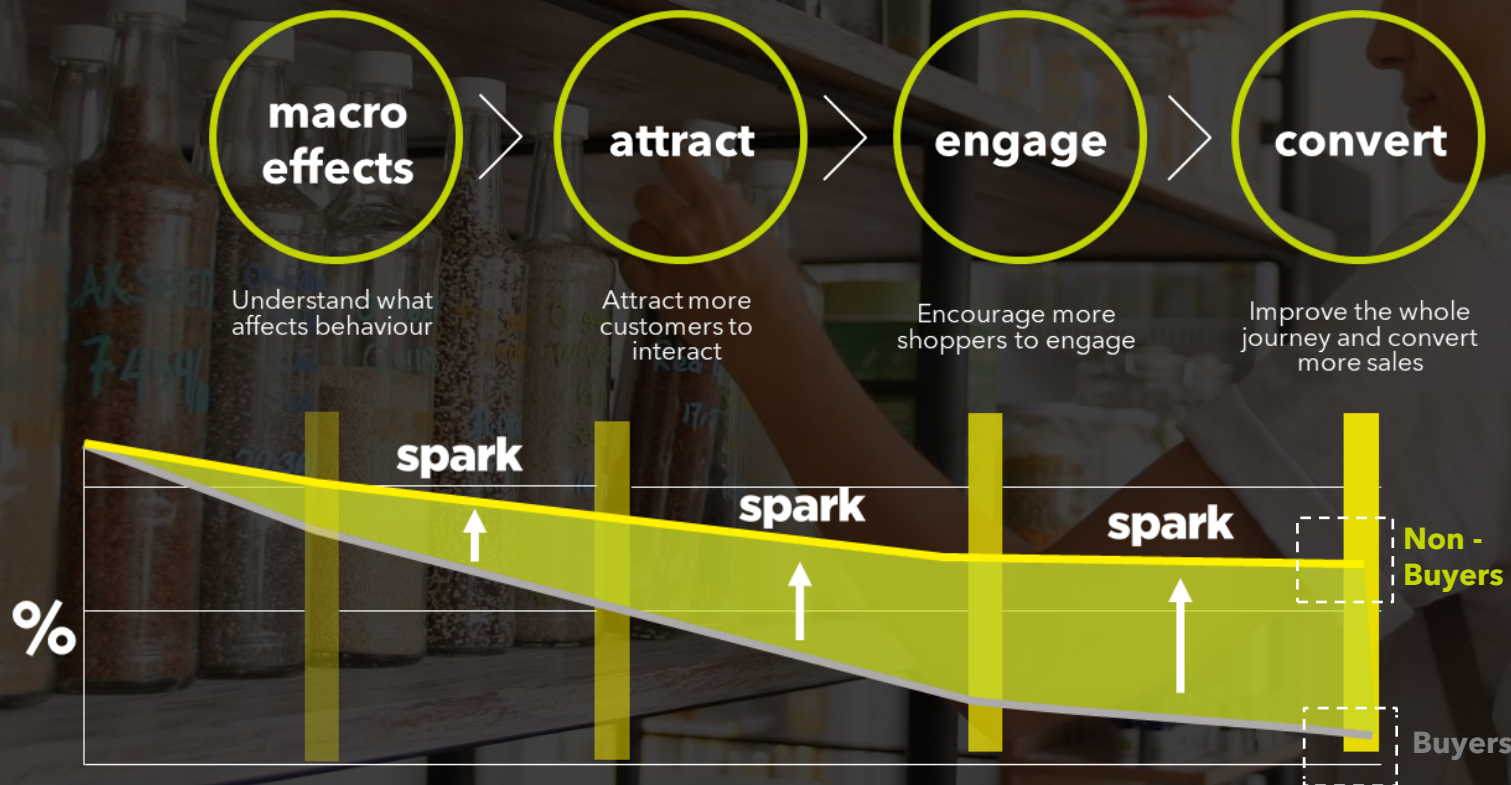
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Who are Spark Emotions?

We understand buyers and, crucially, non buyers



At Spark Emotions we feel **passionate about using all data sources** available.

Whether we are looking to drive **new shoppers to store**, encourage shoppers to **visit more often**, or **spend more** in store it is crucial to go **beyond the traditional** basket analysis and segmentation.

Understanding the behaviours, emotions and purchase intent of buyers, but **crucially, non buyers** (and those **shopping with your competitor or category alternatives**) is where our **expertise comes into play**.