

# spark

Real emotions. Real change

## Mood of the Nation

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

January 2022

[sparkemotions.com](https://sparkemotions.com) | [hello@sparkemotions.com](mailto:hello@sparkemotions.com) | +44(0)1543 255259

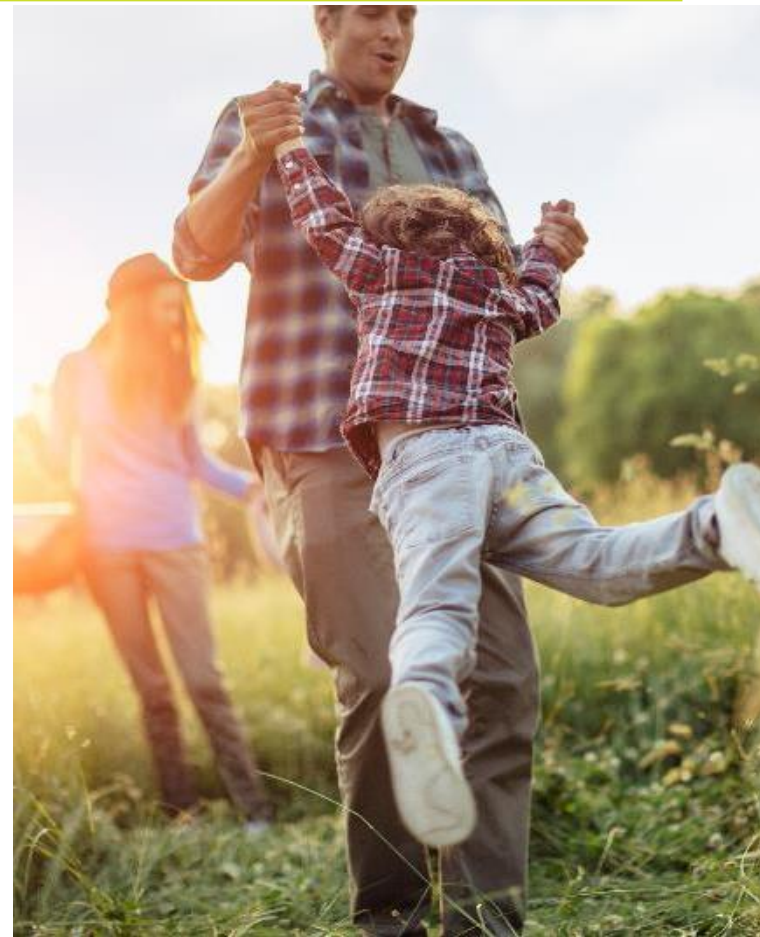
# Getting to the truth of how the UK is feeling

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.

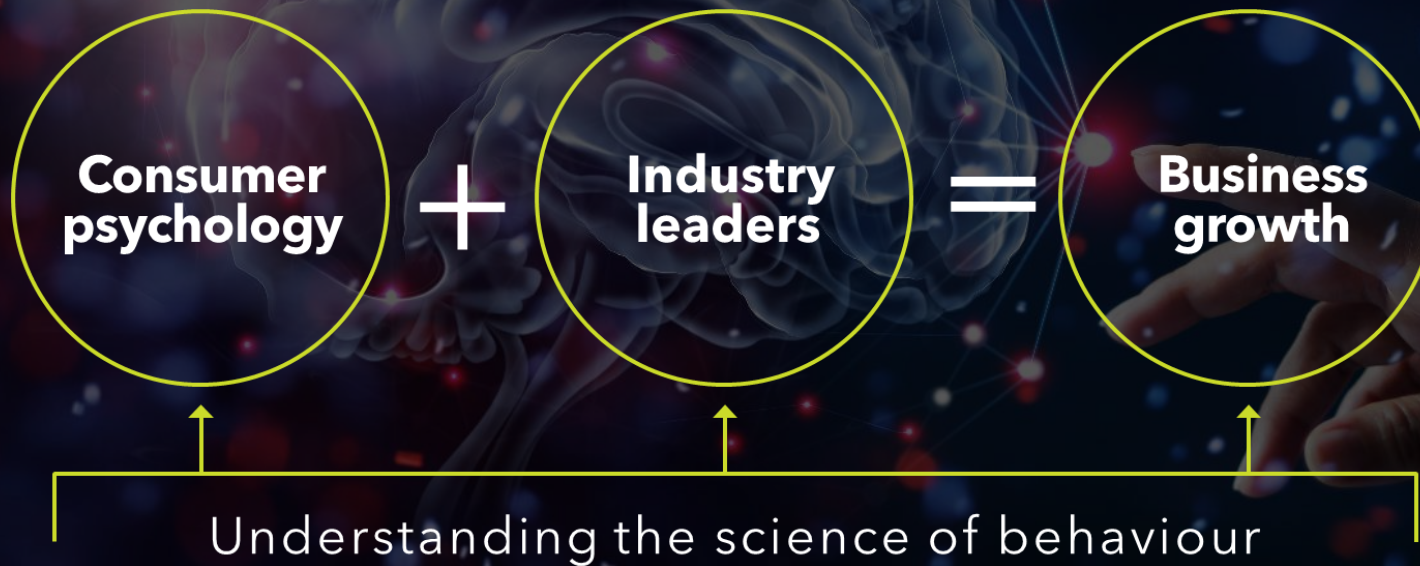
**Every month, we will be speaking to 1,000 people** in the UK to understand how they are truly feeling about the month ahead. Using our unique Spark Emotional Wheel, we will be able to **quantify the emotions of the nation.**

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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A woman with long brown hair, wearing a blue and white plaid shirt over a white t-shirt, is smiling and preparing a salad. She is standing in a kitchen with a brick wall and various kitchen items in the background. In the foreground, there is a wooden bowl, a glass of orange juice, a bowl of salad, and some tomatoes.

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# Mood of the nation



# The new Omicron variant sees UK record its highest number of daily cases since pandemic began

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.





# Experts at understanding emotion

## 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 more excited now compared to this time last year

- When thinking about January, UK adults feel more excited than they did for January last year, after the UK came out of a cancelled Christmas
- Retailers should aim to inject some excitement back into January by inspiring new year possibilities

Ideal score  
(Proud & Confident)

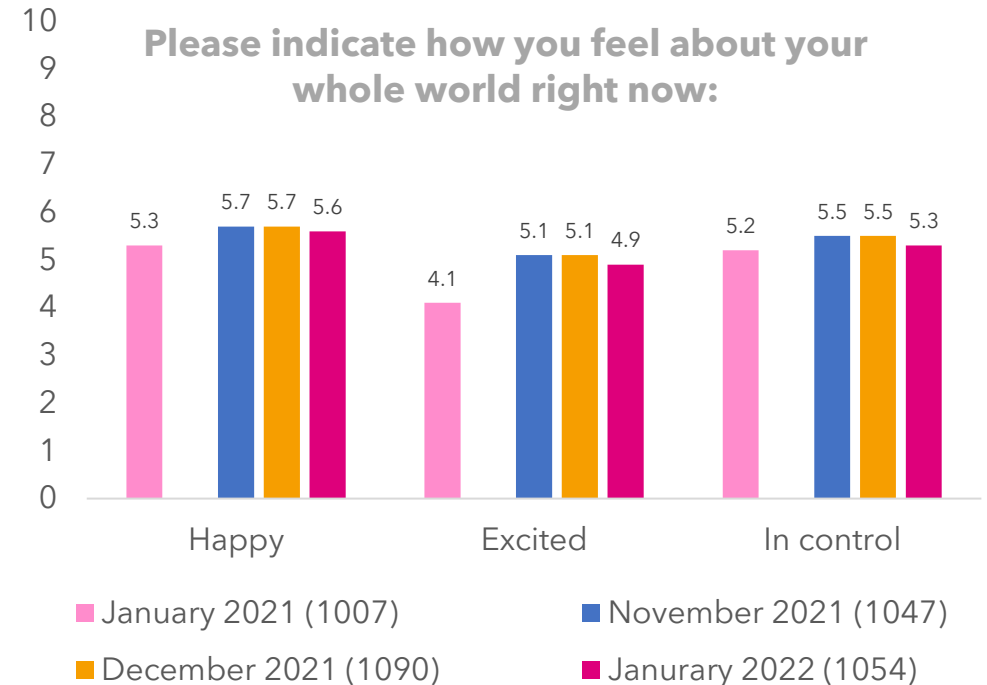


November 2021:  
Interested

December 2021:  
Interested

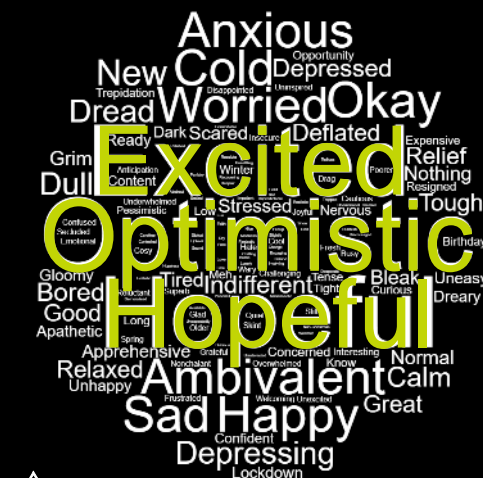
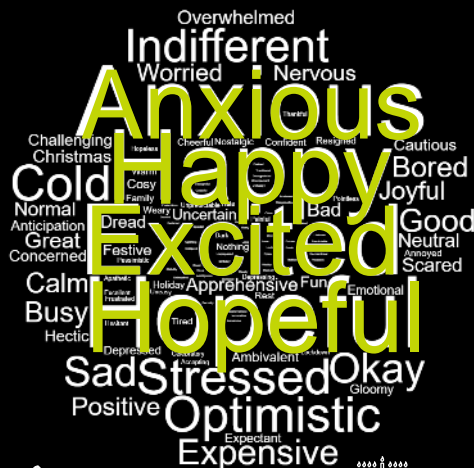
**January 2022:  
Amused**

January 2021:  
Self-controlled



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).



[illegible]

Year starts

Jan 2021

Dec 2021

Year ends

Jan 2022

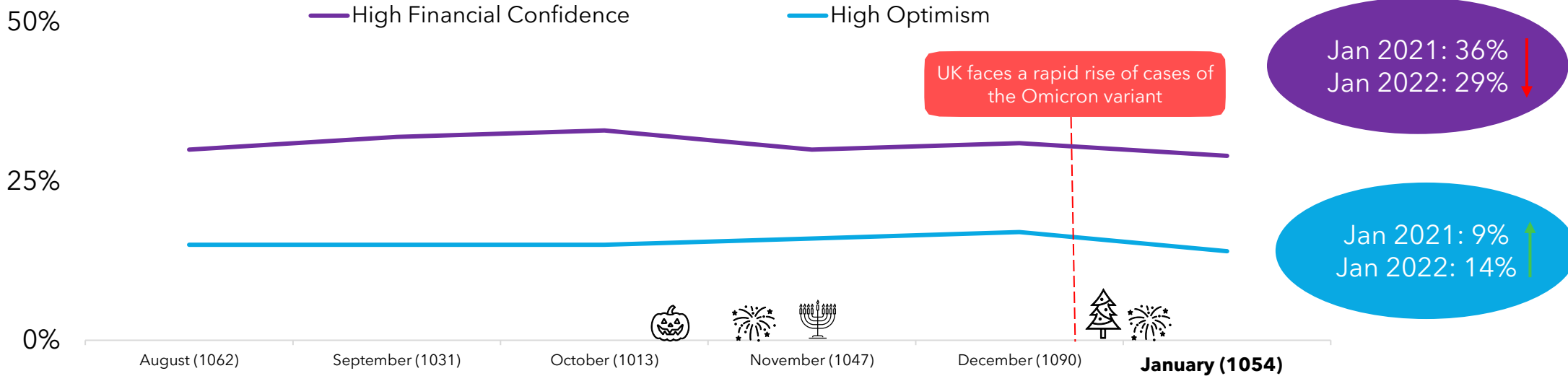
- 'Optimistic' is used to describe thinking about January and are not feeling as anxious as they did in December
- January is a time for fresh starts and research shows we are more likely to achieve goals if we set them at the start of a new time period as it helps to mentally separate past behaviours from our new, better version of ourselves

Dai, Milkman & Riis (2013) The Fresh Start Effect.

# Optimism levels are significantly higher compared to this time last year

- The last 3 months have seen high optimism and financial confidence levels mirror each other - highlighting the knock-on effect that the economy and personal finances can have on how optimistic people feel

## Optimism and Financial Confidence across the last 6 Months



How optimistic or pessimistic are you about your life in the month of January?  
How confident are you about your finances in the month of January? (1=not at all, 10=very)



# Inflation will have a high impact on purchasing decisions for 1 in 2 UK adults

- Inflation hits 10-year high at 5.1% - higher transport and energy costs drove the rise and more expensive fuel, clothing and second-hand cars played a big role

**How much will the increase in inflation impact your purchasing decisions next year? (N:311)**

Low impact  
**(15%)**

Mild impact  
**(35%)**

High impact  
**(50%)**

More than **1 in 2** UK adults say that inflation will have a high impact on their purchasing plans next year



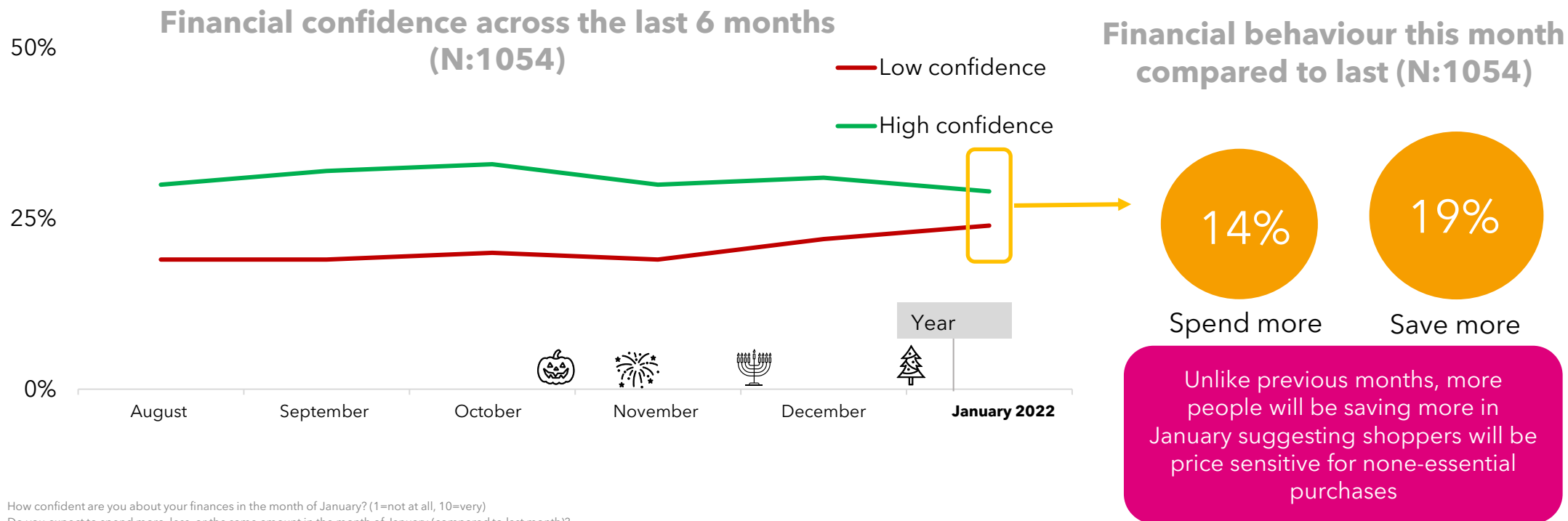
## How can you help?

Retailers need to prepare for and consider more cautious shopping from consumers. Shoppers will be looking for best value for money products.

How much will the increase in inflation impact your purchasing decisions next year? (Survey ran on 15<sup>th</sup> December)

# Reported levels of low financial confidence in UK adults continue to increase

- The percentage of UK adults feeling low levels of financial confidence increases yet again this month making it the highest score we've seen
- More UK adults are expecting to save more this month compared to last month than those expecting to spend more as people tighten budgets after Christmas



How confident are you about your finances in the month of January? (1=not at all, 10=very)  
Do you expect to spend more, less, or the same amount in the month of January (compared to last month)?  
Do you expect to save more, less, or the same amount in the month of January (compared to last month)?





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# Shoppers are thinking about home and self improvements for January

What is one thing you are planning to purchase this month?



**December  
(N:1090)**



**January  
(N:1054)**

Purchases for December were heavily focused on Christmas spending whereas for January, purchases are spread more evenly across categories

More people are planning to spend on 'House/DIY', 'Sport/Hobbies' and 'Health and Beauty' suggesting shoppers are thinking about a '*new year=new me*' so retailers should promote products that highlight well being and self care as well as home improvements

What is one thing you will spend money on in January? (Food removed)



# Shoppers need an excitement boost heading into the new year



## Excitement

When thinking about January, UK adults feel less excited than they have done for previous months, however, they are still feeling significantly more excited than they did for January last year

**Increase excitement for shoppers in stores**



## Optimism

Levels of high optimism have decreased for this January as people are thinking about a start to the year that may come with restrictions. However, they are still feeling more optimistic than they did last January



## Finances

More UK adults are expecting to save more this month compared to last month than those expecting to spend more as people tighten budgets after Christmas

**Consider signposting savvy investments, deals or spreading payments to help shoppers**





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Diet

**Last year, we found that most UK adults were not on a special diet. We wanted to know if this has changed this year.**

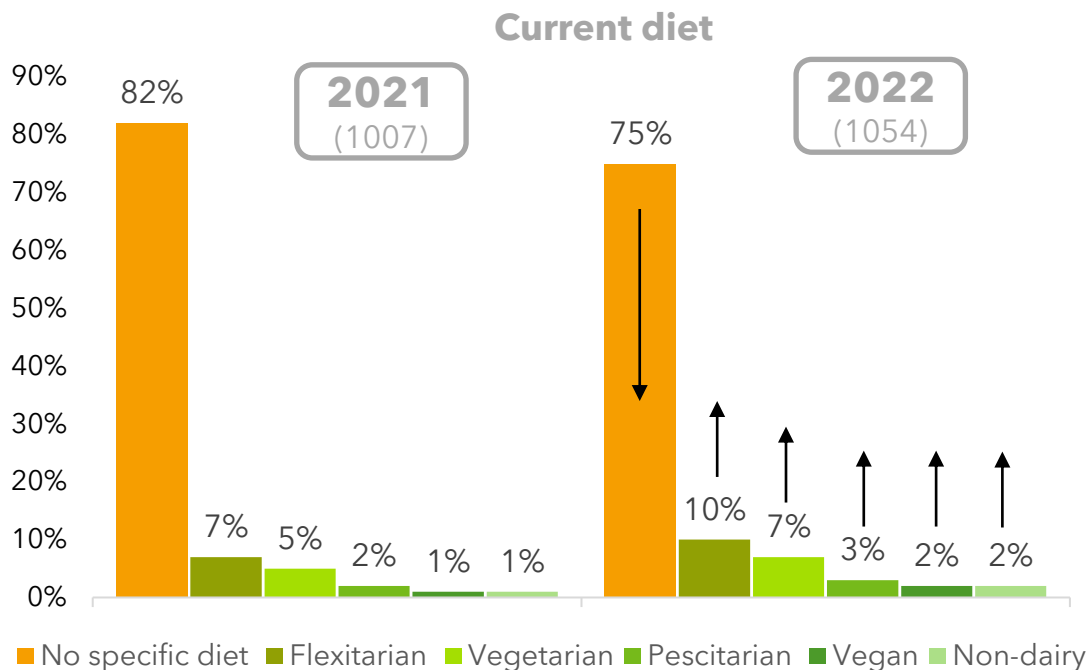
**More importantly, we want to know why people are on the diets they're on.**

**We also wanted to get to grips with UK adult's understanding of how the nation's diet impacts climate change.**



# Compared to last year, more UK adults currently have special diets

- UK adults are becoming more conscious of their food choices as 25% currently have a restricted diet this year (18% last year)
- Choosing to restrict a diet can be led by ethical/environmental concerns



How would you describe your current diet?  
Why is this?

## Why **diet**/no diet? (2022)





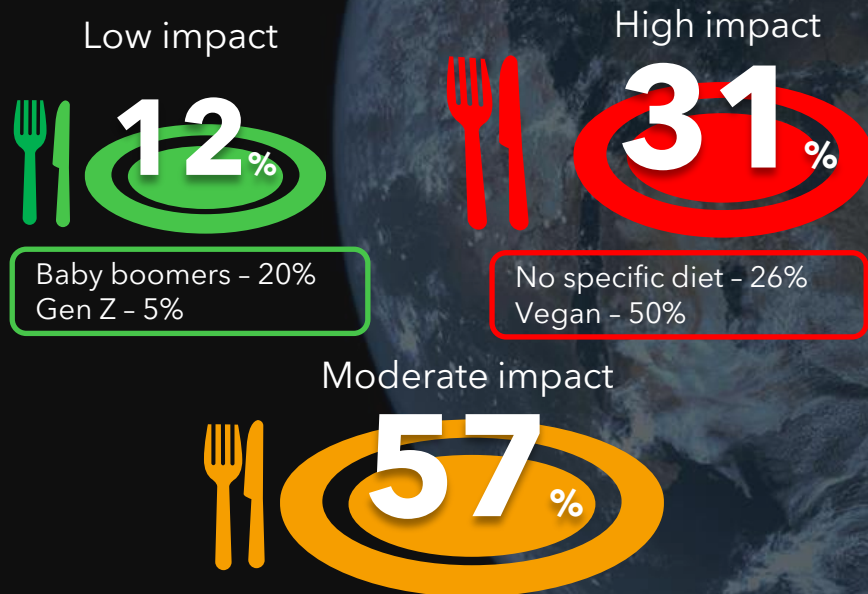
A polar bear and her cub are standing on a small, isolated ice floe in a dark, icy sea. The sky is overcast and grey, with a bright light source visible through the clouds. The water is dark and choppy, with many other ice floes scattered across the horizon.

# Environmental impact is a prominent factor in specific diet choices

# Almost 1 in 3 UK adults think that what the UK eats has a high impact on climate change

- UK adults are aware that their diet could affect the planet so are likely to be open to changes they can make to help
- Older generations are least likely to think the UK's diet has a high impact on climate change and they are more reluctant to believe efforts to tackle climate change will be successful, so purchase changes need to be easy and benefit them

## How big of an impact does the UK's diet have on Climate Change? (N:1054)



[Click here to view our COP26 consumer attitudes report](#)

In this report we found Gen Z more hopeful that positive outcomes can be achieved than Baby boomers

### How can you help?

Communicate about how your brand, product or service is going to do the heavy lifting, so customers don't have to.

To what extent do you think the impact of what the UK eat has on climate change? (0=no impact, 10=large impact)  
Please indicate the extent to which you believe the outcomes of COP26 will be successful in tackling the climate crisis



# UK adults are becoming more conscious of how their diets effect the planet

A circular inset with a yellow border showing a green apple and a measuring tape, symbolizing diet and health.

## Current diets

More UK adults currently follow specific diets (25%) compared to this time last year (18%). Of those who have a diet, a fifth do so because of ethical and environmental reasons suggesting more shoppers are looking for more eco-friendly options

A circular inset with a yellow border showing a pair of hands holding a small potted plant, symbolizing environmental care.

## Environment

Almost a third believe the UK's diet has a high impact on climate change. Older generations are more reluctant to believe efforts to reverse climate change will be successful. This group needs easy and manageable suggestions for changes

**Provide shoppers with food alternatives that meet their needs**



**Last year, sign-ups for the Veganuary campaign - where people eat vegan for the month of January - hit record highs.**

**We wanted to know if more UK adults will be taking part in Veganuary this year and if so, what are their reasons for making this dietary change?**

**We also wanted to delve into the UK's feelings and emotions towards Veganuary and other specific diets.**



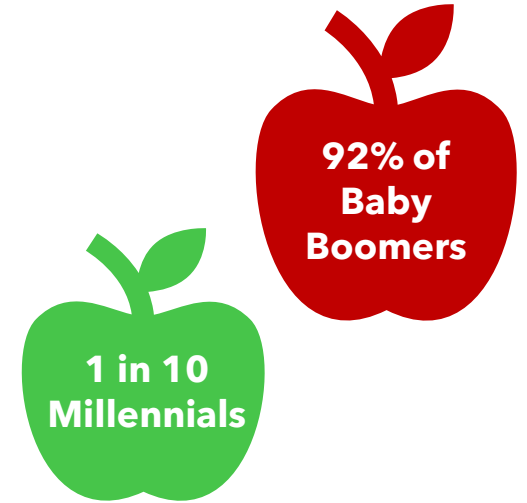
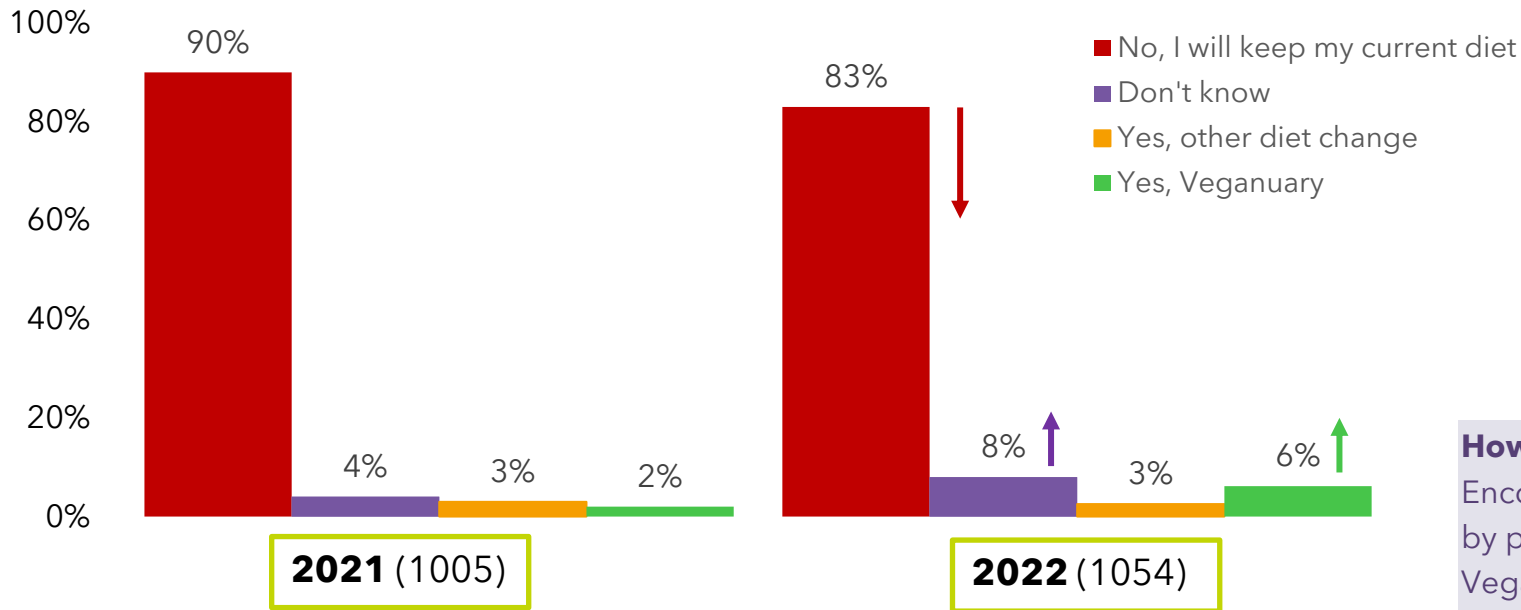


**81% of UK adults have never taken part in  
Veganuary or other diet change before**

# More UK adults are interested in specific diets in the new year compared to last year

- Older generations are more likely to stick to their current diet whilst younger adults are more open to Veganuary and other diet change – emphasise the ease of changing diet to encourage more to take part.

## Will you be taking part in Veganuary, or other diet change this year?



### How can you help?

Encourage shoppers to disrupt their habits by promoting the health benefits of a Vegan/Veggie based diet and provide simple recipes to facilitate an easy change.

Will you be taking part in Veganuary, or any other diet change in the new year?





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# Health is the driving factor for taking part in Veganuary or diet change

- Compared to last year, more UK adults are taking part in a diet change for health and ethical/moral reasons.
- Almost a quarter believe their diets will be a way to save money suggesting retailers should be highlighting recipes that consider shoppers who are on a budget

Reasons for taking part in Veganuary, or any other diet change? (N:92)



↑↓ = Up or down by X% compared to 2021

Why will you be taking part in Veganuary, or any other diet change in 2022? (multiple response)

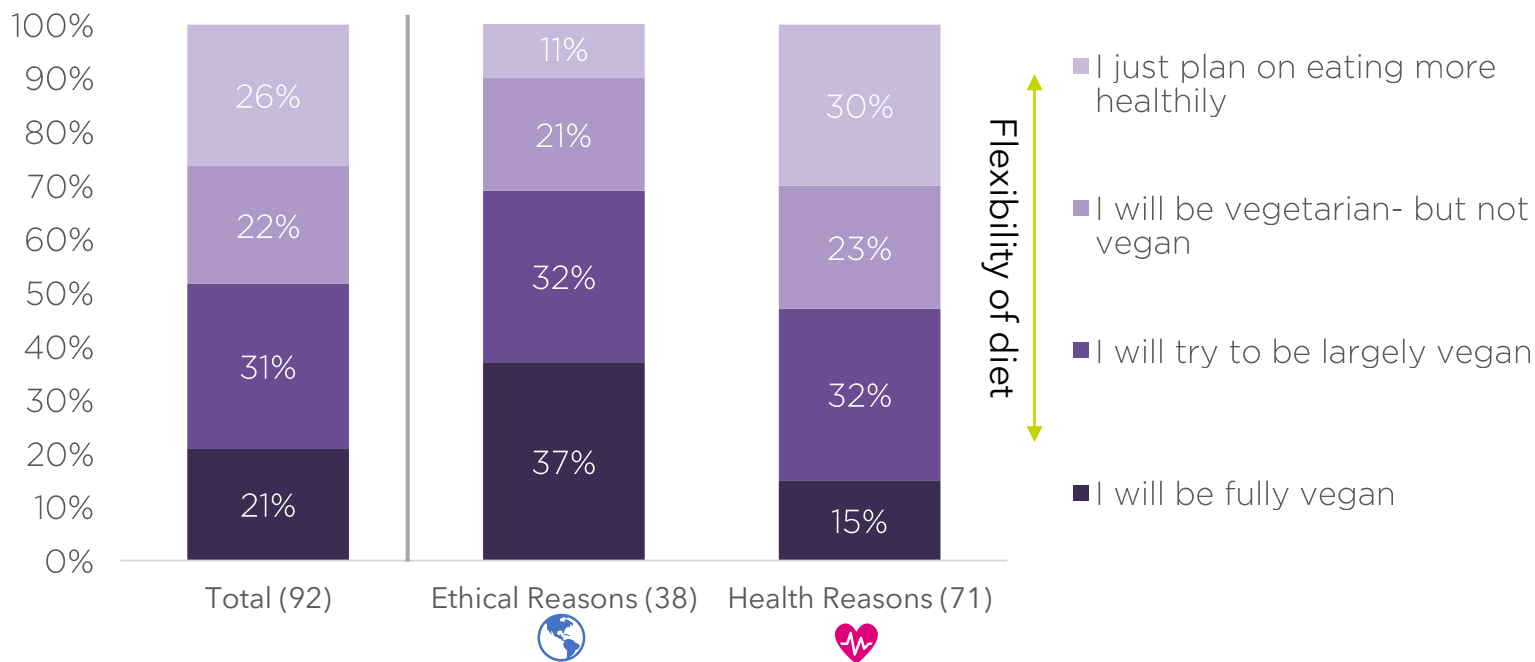
## How can you help?

Encourage healthy eating behaviours to continue after January by providing shoppers with meal plans and inspiration.

# Only a fifth of those following a Veganuary/January diet plan to go fully vegan

- Those taking part for ethical reasons are more likely to be stricter with their diets compared to those who will diet for health reasons who will be more flexible

How strictly do you plan on following your diet / reasons for following a diet? (N: 92)



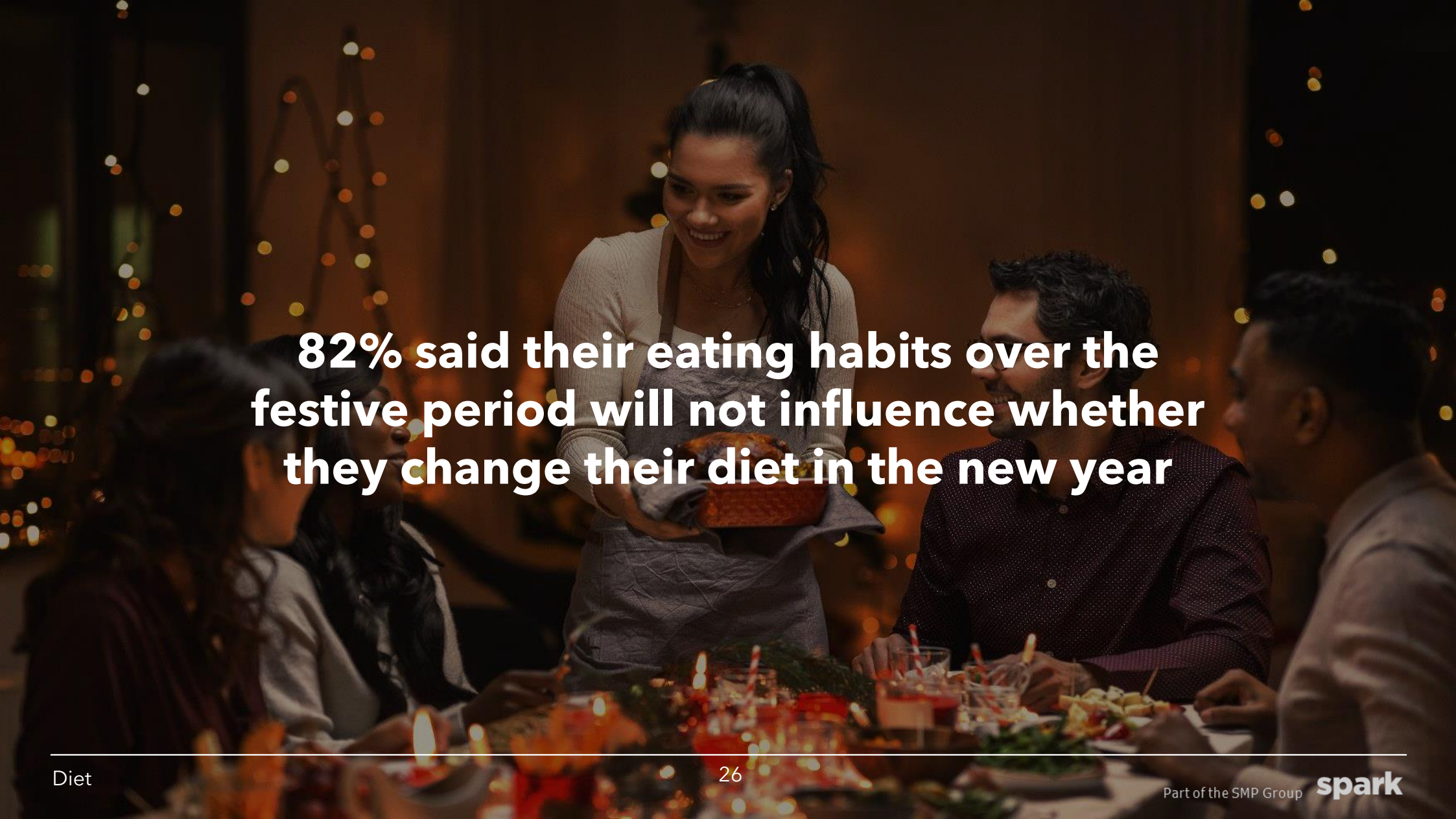
**1 in 4** men plan to go fully vegan (which is more than women)

35% of Gen Z's taking part will try to be largely Vegan



How strictly do you plan on following Veganuary or other diet change?  
Why will you be taking part in Veganuary, or any other diet change in 2022? (multiple response)





**82% said their eating habits over the festive period will not influence whether they change their diet in the new year**



# Half of UK adults plan to continue their diet change after January

- Those who expect their festive eating habits to influence whether they diet are less likely to want to continue after January. These shoppers may be looking to balance out their indulgences at Christmas.

## Do you plan to continue this change after January? (N:92)

**Will** continue their diet beyond January

Are **unsure** whether they will continue

**Won't** continue

**49%**

**38%**

**13%**

Women = 55%  
Those doing a diet with other people = 33%

Men = 45%

**18%**

Said their eating habits over Christmas **would affect** how likely it is that they diet in January

**42%**  
Would not continue after Jan

### How can you help?

Promote the long-term benefits of sticking to the change in store. Turn the trend into a habit by using Social Proof so shoppers see that others are sticking to it too.

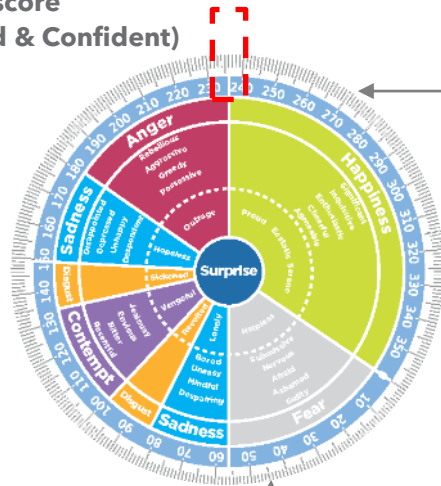
Do you plan to continue this diet change after January?

# Those taking part feel adventurous, showing diet change is fun

Almost **1 in 10** will take part in a diet change this year

- UK adults who are not planning to take part in Veganuary or other diet change feel embarrassed and have lower levels of happiness, excitement and control than those who are.
- Those who are taking part are at the opposite end of the spectrum as they feel adventurous – this is a similar pattern to what we saw last year

Ideal score  
(Proud & Confident)



**Taking part 2022:  
Adventurous**

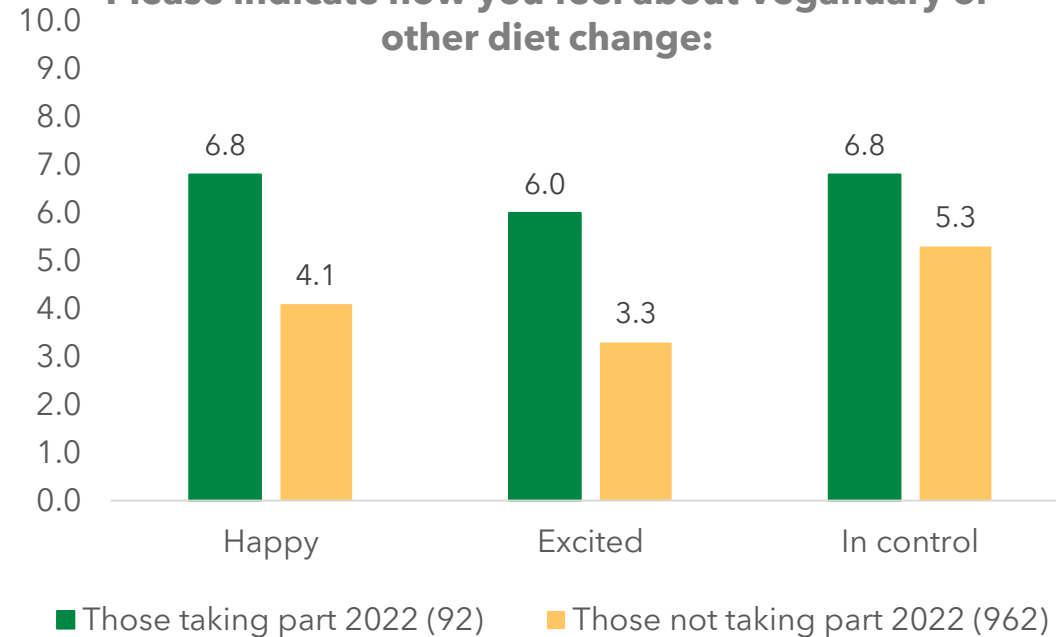
**Not taking part  
2022:  
Embarrassed**

## How can you help?

Emphasise the adventure that comes with trying new food and recipes and encourage those who aren't taking part to get involved by adding excitement to the category

How do you feel when thinking about Veganuary. Happy; Excited; In control (1 = not at all, 10 = very).

**Please indicate how you feel about Veganuary or other diet change:**





# Diet changes and Veganuary are becoming more popular, but some still need a boost to continue

A circular inset image with a yellow border showing a person's hands holding a white bowl filled with a colorful salad of vegetables and grains.

## Taking part

More UK adults will be taking part in Veganuary in the new year compared to last January. Older generations are more likely to stick their current diet whilst younger Adults are more open to Veganuary and other diet change.

**Emphasise the ease of changing diet to encourage older generations to take part**

A circular inset image with a yellow border showing hands preparing a dish, with one hand sprinkling something onto a bowl of food.

## Following the plan

Those who are taking part in diet change for ethical reasons are more likely to go fully vegan than those who are taking part for health reasons. 1 in 2 plan to continue their diet change after January.

**Promote the multiple benefits of being Vegan and use social proof to get more people taking part**

A circular inset image with a pink border showing a man and a woman laughing together in a kitchen setting.

## Feelings

UK adults who plan to take part in Veganuary or other diet change feel Adventurous and have higher levels of happiness, excitement and control than those who are not taking part and who feel embarrassed.





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# Summary

# Executive Summary



## The Mood of the Nation

- When thinking about January, UK adults feel less excited than they have done for previous months
- Levels of high optimism have decreased for this January as people are thinking about a start to the year that may come with restrictions.
- More UK adults are expecting to save more this month compared to last month than those expecting to spend more as people tighten budgets after Christmas



## Dieting

- More UK adults currently follow specific diets (25%) compared to this time last year (18%). Of those who have a diet, a fifth do so because of ethical and environmental reasons
- Almost a third believe the UK's diet has a high impact on climate change. Older generations are more reluctant to believe efforts to reverse climate change will be successful.



## Veganuary

- More UK adults will be taking part in Veganuary in the new year compared to last January. Older generations are more likely to stick their current diet
- Those who are taking part in diet change for ethical reasons are more likely to go fully vegan than those who are taking part for health reasons.
- Half plan to continue their diet change after January.



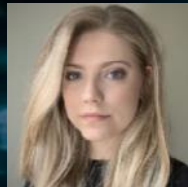
# Thank you for reading

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



**Evie Harris-Jenkins**

Research Executive



**Tara Moran**

Senior Research Executive



**Scott Willey**

Associate Director

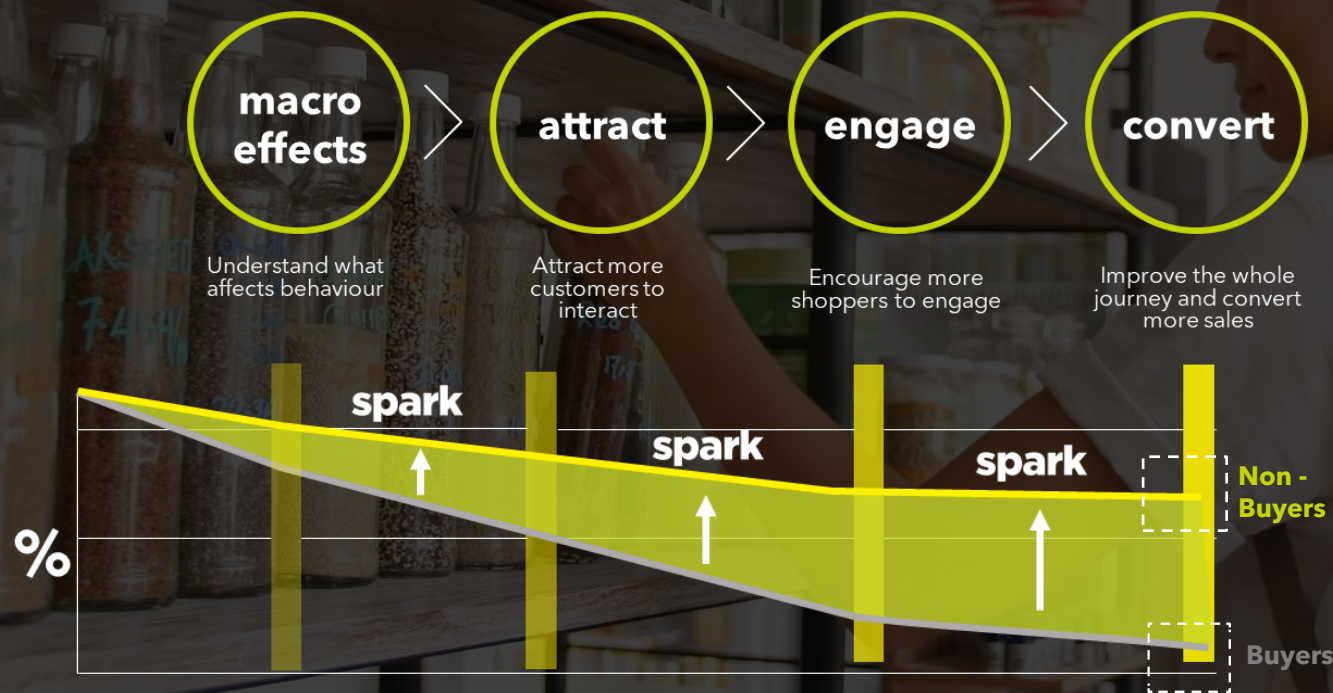
Get in touch with us - [hello@sparkemotions.com](mailto:hello@sparkemotions.com)



# 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**.

# Thank you

email: [hello@sparkemotions.com](mailto:hello@sparkemotions.com)  
web: [sparkemotions.com](http://sparkemotions.com)  
phone: +44 (0)1543 255 259

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