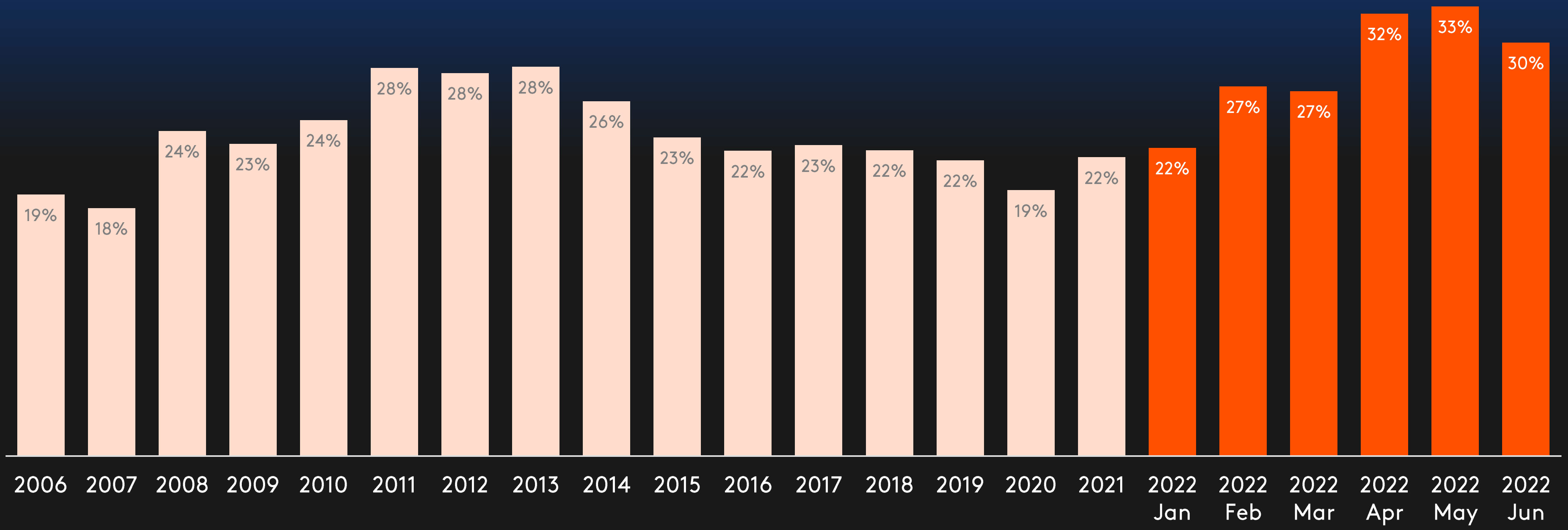
Here's what **TGI** is telling us about **the cost of living crisis** in Great Britain…

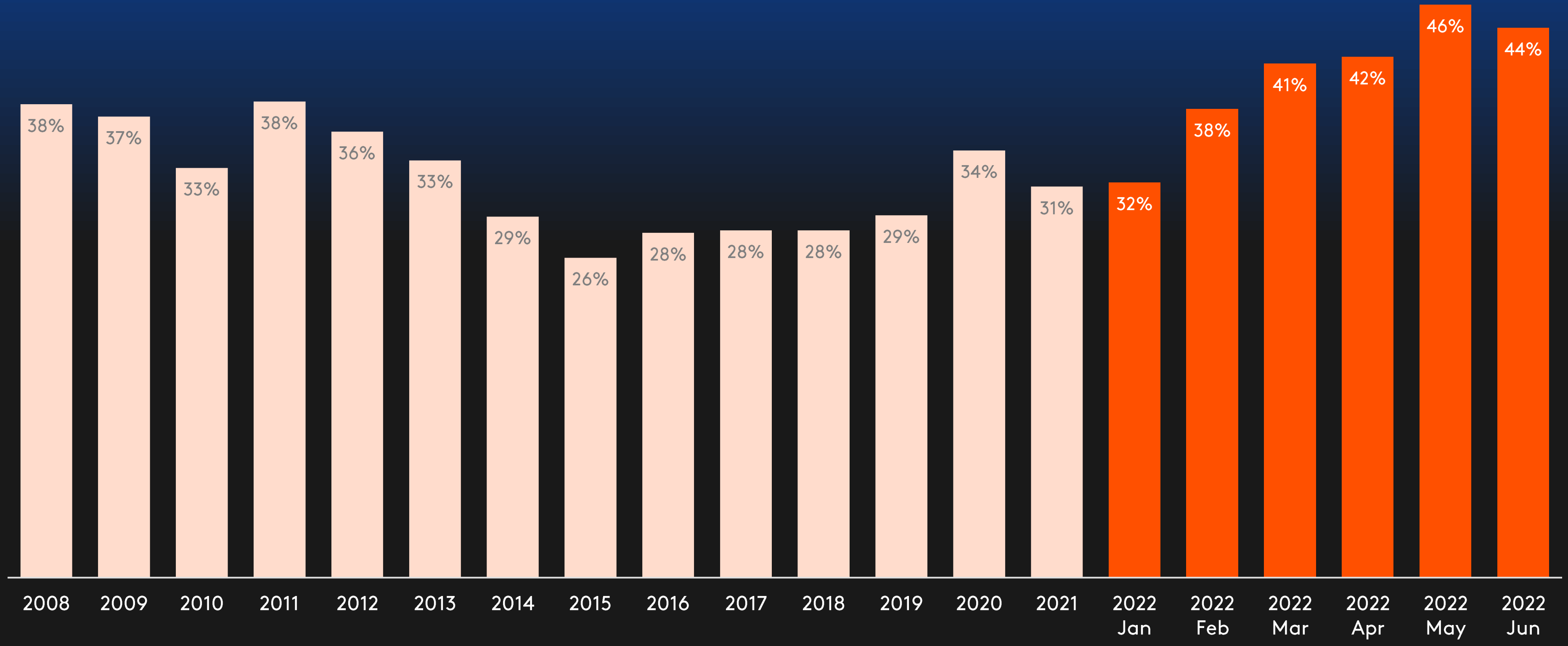
% of adults who are finding it '**difficult or very difficult' to cope on their present level of income** – is at its **highest level** since the question was first asked in **2006**



KANTAR

Source: GB TGI 2006 – 2022
Base: All Adults 15+

% of adults who agree: **'The economic outlook heavily affects my purchasing behaviour'** – is at a **higher** level now than during the **2008** financial crisis



KANTAR

Source: GB TGI 2008 – 2022
Base: All Adults 15+

Shopping behaviour changes...

+54%

increase in adults visiting their local markets at least once per week

+45%

increase in adults who say they shop everyday

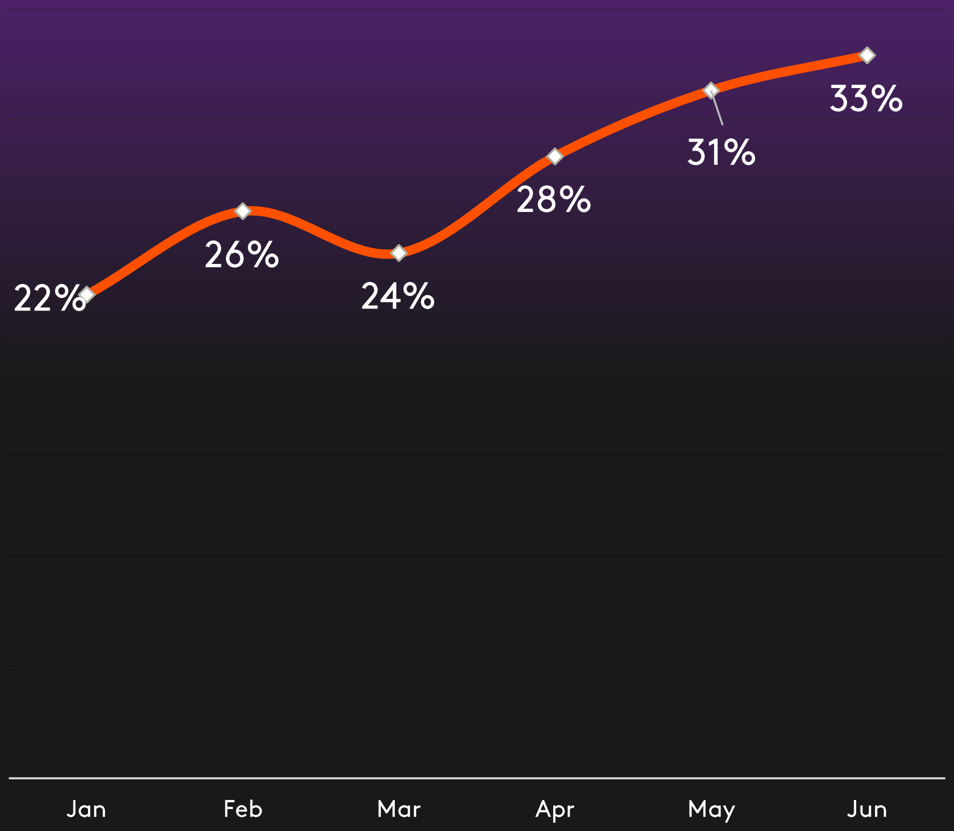
+10%

increase in adults who are 'always looking for food & drink promotions'

KANTAR

Changes Q2 vs. Q1 2022
Source: GB TGI August 2022 (July 2021 – June 2022)

Shopping behaviour changes…



+50%

increase in adults who regularly buy budget ranges at the supermarket across first six months of 2022

Fastest increase among the
'Unconstrained Couples'
(35-54, married / living as a couple, do not live with son or daughter) – a group that typically over-indexes on premium & luxury goods

KANTAR

Source: GB TGI August 2022 (July 2021 – June 2022)

Focus on: Unconstrained Couples

35-54, married / living as a couple, do not live with son or daughter

Increase in 'Unconstrained Couples' using **supermarket labels** across following food categories…

Yoghurts	Jams & Spreads	Pasta Sauces
+71%	+62%	+45%

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Changes Q2 vs. Q1 2022
Source: GB TGI August 2022 (July 2021 – June 2022)

Focus on: Primary School Parents

Live with son/daughter, youngest child is aged 5-9

Eating out in a restaurant at least once a month

-38%

Purchasing Branded Ready Meals

+21%

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Changes Q2 vs. Q1 2022
Source: GB TGI August 2022 (July 2021 – June 2022)

CONSUMER CHOICES: TRADE-OFFS

Environmentally Friendly

-10%

fall among adults who agree that **'I am prepared to pay more for environmentally friendly products'**

Changes Q2 vs. Q1 2022
Source: GB TGI August 2022 (July 2021 – June 2022)

Spotlight on... 'Nest Builders'

15-34, Married/Living as a couple, do not live with son/daughter

The most likely group to agree:
'I am prepared to pay more for environmentally friendly products' (Index: 147)

... but falls in 'environmentally friendly' being a key purchase criteria in following categories:

Clothing & Accessories	Toiletries & Cosmetics	Food
-35%	-32%	-13%

KANTAR

Changes Q2 vs. Q1 2022
Source: GB TGI August 2022 (July 2021 – June 2022)

CONSUMER CHOICES: TRADE-OFFS

Quality

-4%

fall among adults who agree that: **‘It is worth paying extra for quality goods’**

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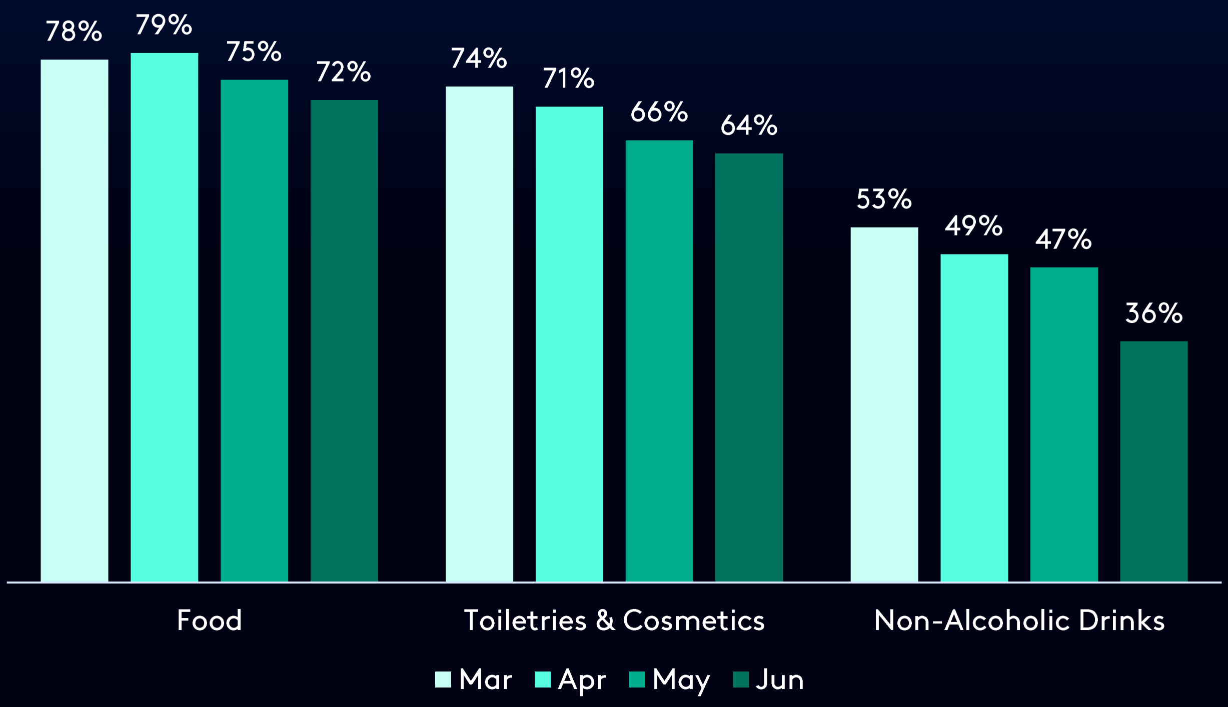
Changes Q2 vs. Q1 2022
Source: GB TGI August 2022 (July 2021 – June 2022)

Spotlight on… 'Unconstrained Couples'

35-54, married/living as a couple, do not live with son or daughter

Typically a quality-conscious TGI Lifestage group – seeing month-on-month falls in respondents choosing 'quality' as an important criteria of choice in following categories:



KANTAR

Source: GB TGI August 2022 (July 2021 – June 2022)

CONSUMER CHOICES: TRADE-OFFS

Brand

Spotlight on…'Flown the Nest'

35-54, married / living as a couple, do not live with son or daughter

The 'Flown the Nest' group are those most likely to agree that 'once I find a brand I like, I tend to stick to it'

% change in selecting 'manufacturers brand' as an important criteria of choice among the 'Flown the Nest' Group

Clothing & Accessories	+13%
Toiletries & Cosmetics	+8%
Food	-6%
Non-Alcoholic Drinks	-10%
TV Sets	-33%
Audio Equipment	-49%

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Changes Q2 vs. Q1 2022
Source: GB TGI August 2022 (July 2021 – June 2022)

Paid-for media is likely to face a tough fight for share of wallet during the financial squeeze…

-19%

% adults who say that they would **"pay to access content online."**

Biggest fallers by TGI Lifestage group:

'Flown the Nest'	-37%
'Unconstrained Couples'	-35%
'Hotel Parents'	-33%

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Changes Q2 vs. Q1 2022
Source: GB TGI August 2022 (July 2021 – June 2022)

… but there are also some early signs of softening consumer attitudes towards advertising…

-10% ↓

% adults who say that "advertising is a waste of my time."

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Changes Q2 vs. Q1 2022
Source: GB TGI August 2022 (July 2021 – June 2022)

… and increases in how consumers value advertising and sponsorship to make purchase decisions

+3%

Any Agree:
"Advertising helps me choose what to buy"

"I prefer to buy products from companies who sponsor…":

+6%
Sports Events & Teams

+17%
TV Programmes

+24%
Exhibitions & Music Events

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Changes Q2 vs. Q1 2022
Source: GB TGI August 2022 (July 2021 – June 2022)

Summary

Increase in people struggling to cope on present levels of income ▶ Some sharp shifts in shopping behaviours ▶ Different consumer groups face different trade-offs in their purchase decisions ▶ Some evidence of softening of attitudes towards advertising

TGI Lifestage helps to understand how personal circumstances impact consumer decision points during cost of living challenges

KANTAR

Thank You

Learn more about TGI
via our online creds deck

Get in touch with our team to discover how TGI can support your business in understanding the impacts of the cost of living crisis

LINK