The Dis/Connected Consumer Index

UNDERSTANDING CONNECTIVITY, CONNECTION AND WHAT IT MEANS FOR BRANDS, BUSINESSES AND THE PUBLIC SECTOR IN THE UK

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Opinium

Contents

We are supposedly better connected than ever before. A combination of traditional and new media, underpinned by record investment in technology and digital infrastructure, should enable the public and private sectors to better reach and engage people across the UK.

But, does connectivity equal connection?

To answer this question following an unprecedented period of change, Grayling and Opinium have sought to understand how - and to what extent - people are connecting with brands, government, culture and society as a whole. We wanted to understand how people are engaging with content and how much faith they have in it - two elements integral to effectively driving action.

Studying this will enable us to understand the mindset of different groups in society, their perspective on contemporary media, brands, society and culture and what this might mean for their well-being, as well as the implications for communications campaigns looking to reach them and cut through the noise to make an impact.

We want to address this because we believe audiences are the biggest driver of success for organisations. The ability to understand, reach and engage audiences is what enables a business to increase sales, a disrupter to drive product adoption or a public body to deliver behaviour change. But audiences are incredibly complex. Perceptions of campaigns and media are always shifting, whether generationally or because of events like the Covid pandemic or cost of living crisis. This research tries to look at audiences from a different angle and to learn lessons for how businesses and the public sector communicate with the people who will have the biggest impact on their business.

Sarah Scholefield

GLOBAL CEO

GRAYLING

In communications, our job is to inform and engage. To do this, organisations - whether businesses, the public sector, charities, utilities or non-governmental organisations (NGOs) -need to understand their audiences and connect with them.

At Grayling, we know that audiences are complex. This research highlights again the need for organisations to innovate communications to ensure they reach all sections of society. That is why every project we deliver starts with understanding our clients' audiences inside out.

It's worrying to find a large number of people at risk of becoming 'Disconnected'. Not just from media, but more broadly. As we come out of one global health emergency and into a serious cost-of-living crisis, this presents a huge challenge to governments, brands, media, service providers, and communicators; we need to work hard to ensure vital communications and messaging reaches those people who need it most.

We are clearly better connected than ever before, but many traditional channels don't work for everyone. We know from working with clients who strive to reach their audiences in every way possible that we always need to find alternative ways of connecting with audiences. That's why we view people at risk of disconnection as alt-connected.

We just need to find alternative ways of reaching them. Organisations who adopt this mindset can create a competitive advantage by engaging all segments of the society more effectively.

GRAYLING.COM

Josh Glendinning

RESEARCH DIRECTOR

OPINIUM

There is a tendency in both market research and communications to focus on people who are young, enthusiastic, and engaged.

They tend to be the most passionate advocates of brands, the earliest to adopt new technologies, the most forthcoming in expressing their views, and often the easiest to persuade through marketing.

However, focusing on this group alone gives a highly distorted picture of society. **Opinium was founded on the belief that success comes from understanding what people think, feel, and do. And it's just as important to understand people whose views may be seen as hostile, apathetic, unconstructive, or simply different to our own.**

Similarly, we often assume that having more ways to communicate than ever is an unalloyed good. But communication is underpinned by trust and good faith. Without these, new technology is an irrelevance at best and a recipe for further alienation at worst.

Communicating with groups who feel disconnected starts by better understanding them. We hope that this report goes some way to improving this understanding and starting an important conversation about how we can reconnect.

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Research Premise & the Four Quadrants

We surveyed 12,000 adults in the UK, France, Germany, Poland, Singapore and the USA. The survey began by asking respondents about the frequency with which they consumed various forms of media (TV, social media, etc.) and about various topics (local news, sports, etc.).

The media consumed by respondents was then mirrored by a set of questions asking how much they trust each form of media and how much they trust the media they consume about various topics.

For both the consumption and trust questions, each response was assigned a score.

These were summed together to create an aggregate measure of:

a) total level of consumption of media and;
b) total level of trust in media for each respondent

Taking the median value for consumption and trust in each market, we were able to split the sample into four groups in each of the six markets:

The Opt-Outs

(low consumption, low trust):
those below the median value for both consumption and trust in their market

The Plugged-In

(high consumption, high trust):
those above the median value for both consumption and trust in their market

The Loyalists

(low consumption, high trust):
those below the median value for consumption, but above the median value for trust in their market

The Informed Sceptics

(high consumption, low trust):
those above the median value for consumption, but below the median value for trust in their market

Headline Findings
The Opt-Outs – A group at risk of disconnection

Grayling and Opinium Research find that across six key global markets, brands and governments are finding it hard to reach, engage with or influence a significant proportion of the population. In the UK, just three in ten consumers feel highly connected to the national conversation, having both high engagement with, and trust of, media, government, brands, and other people. That leaves seven in ten who are, to some extent, either harder to reach, engage or influence. Within this is the most challenging group of all – the 'Opt-Outs'.

The Opt-Outs are a group of people who are largely disengaged from the media and distrust much of what they hear when they do tune in.
These people feel a growing sense of alienation from and cynicism about society and contemporary culture, resulting in them actively leaning away from communications, content and information.

This trend has serious commercial repercussions for businesses, as well as hindering the work of government, NGOs, and other groups who have important messages (for example, around fraud protection) or need to engage people with vital services.
This disconnection could put them at a serious disadvantage when it comes to receiving important public announcements, such as health-related news.

***The Opt-Outs* aren't a fringe group in the UK. They make up a significant portion (29%) of the UK population and include people who will be a key target segment for a range of businesses. Whilst the group skews to having a lower income than average, nearly four in ten (39%) earn more than £30,000 per year. They are also still active purchasers; nine in 10 make key purchasing decisions and more than one in five (22%) shop online every week.**

When combined with the Informed Sceptics (another segment identified in the research), we see a huge chunk of the UK population who are incredibly distrusting of the information they receive. This is a worrying trend that businesses and government need to address.

This phenomena of large swathes of society being tuned out from the mainstream is not unique to the UK. In Poland and Germany, we identified 29% of the population as belonging to the Opt-Outs group, rising to 30% in Singapore, 31% in France and 33% - one in three people – in the United States.

29%
OF THE UK POPULATION

39%
EARN MORE THAN £30,000 PER YEAR

9/10
MAKE KEY PURCHASING DECISIONS

22%
SHOP ONLINE EVERY WEEK

GRAYLING creating advantage
Op Opinium

Worsening trends in trust and connection

Distrust and disengagement with media, digital communications and society more broadly, isn't a problem solely limited to the most disconnected groups.

The findings also demonstrate a fall in trust in all forms of media over the last two years from across society. Social media, in particular, is facing a challenge of trust. Although people across the board are likely to say they spend more time on social media than two years ago, trust in the medium is down significantly in all territories. In the UK, nearly four in ten (38%) of people say they trust social media posts less than they did two years ago.

When it comes to good governance, two thirds (66%) of the British public do not trust the government to make choices in the public interest, with the Opt-Outs particularly sceptical (73%). Print media also risks a crisis in trust, with nearly a quarter of respondents saying they trust information they read in print less than they did two years ago.

In this study, Grayling and Opinium Research explore the stories behind the data to examine how social disconnection impacts many areas of lives from falling trust in media and government, to views on health, politics, brands, and even conspiracy theories. Which groups are most affected by disconnection and how can we redress the balance?

Let's take a look at each of the quadrants that we analysed individually to understand their media traits and the challenges and opportunities.

66%

DON'T TRUST GOVERNMENT TO MAKE CHOICES IN THE NATIONAL INTEREST

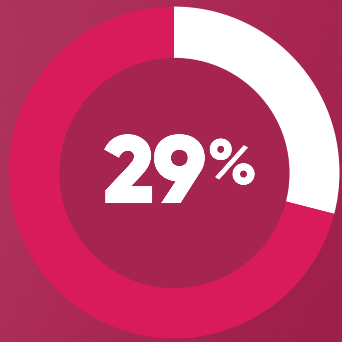
38%

SAY THEY TRUST SOCIAL MEDIA POSTS LESS THAN THEY DID TWO YEARS AGO

26%

TRUST BRANDS

The Opt-Outs



The Opt-Outs are the second largest quadrant in the UK, representing 29% of the population.
They are alienated by many aspects of society and contemporary culture, which they feel is not working for or relevant to them. This includes traditional media and significant global issues like politics, the environment, brands and other social groups.
The Opt-Outs tend to have less disposable income than other quadrants, and a significant portion are retired.

This left-behind group often features more women than men and are generally the over-55s.
In the UK, people in this quadrant are the most likely to be disconnected from all forms of media and put little stock in the content and information they are consuming.

The Opt-Outs are 45% and 39% less likely to read print and online newspapers daily than other groups – with 70% and 85% finding newspapers and social media 'untrustworthy', respectively.

They are the only quadrant to see immigration as more of a burden than a benefit and are less likely to see environmental damage as being consumers' responsibility. They are also the most cynical of the government, with nearly three quarters of the Opt-Outs not trusting the government to make choices in the public interest.

However, despite their feelings of disconnection and alienation, the Opt-Outs still wield considerable power and represent a currently missed opportunity for businesses and political parties. They were the quadrant most likely to have voted for Brexit in 2016 and to have the second highest proportion of Conservative voters, just behind The Loyalist quadrant.

While a disproportionate number of the Opt-Outs live in northern England, it's likely that many respondents who fall within this quadrant are historically 'Red Wall'—putting the Opt-Outs in a position of significant sway over future election outcomes.

TRUSTED BRANDS:

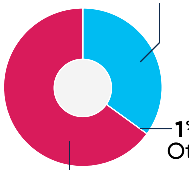
Cadbury
HEINZ
M&S
TESCO

The Opt-Outs

AGE

18 - 34	18%
35 - 54	29%
55+	53%

GENDER



35% Male

1% Other

65% Female

MEDIA ACTIVITY
(once a week or more)

Live TV	71%
Check social media	70%

WORKING STATUS

Retired	35%
Unemployed or not working	15%
Working full time	30%

MEDIA TOPICS
(once a week or more)

Local news	64%
Shopping & products	49%

PERSONALITY TRAITS

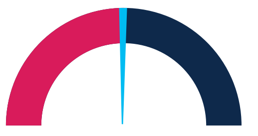
Not trusting of others	43%
Not active	40%
Not creative	48%

MEDIA TRUST
(% low trust, 0-4)

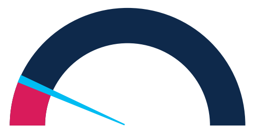
Politics	50%
Health	33%

The Opt-Outs

ATTENTION TO BRANDS



POLITICAL ATTENTION



OVER-INDEXING ISSUES

Immigration	23%
Unemployment/ jobs	9 %

NEGATIVE BRAND ATTRIBUTES

Too expensive	53%
Untrustworthy	17 %

POLITICAL BELIEFS & BEHAVIOUR

- Much less likely to have voted in any election or the EU referendum.
- Among those that did vote, they are more likely to have voted Conservative and to leave the European Union.
- Much less likely to trust government to act in public interest
- More likely to believe Covid was manmade and Covid restrictions were created to control the population

POSITIVE BRAND ATTRIBUTES

Good value
61%

They care about their employees
6 %

They behave ethically
16%

Reaching *the Opt-Outs*

THE PUBLIC HEALTH AND DISINFORMATION RISK

Nearly a quarter (24%) say they 'never' receive any government communications and a third don't trust the media when it concerns public health. Post-Covid, this disengagement and distrust of public health messaging could be catastrophic in a future pandemic or public health crisis.

POLITICAL DISILLUSIONMENT

In an increasingly polarised society, the Opt-Outs are the most frustrated. Nearly three-quarters do not trust the government to make decisions in the public interest. As we enter a cost-of-living crisis and a potential recession, this trend is likely to worsen and with more than a quarter saying they 'never' see any political information, a large portion of the British public are left outside the national conversation.

DIGITAL FIRST DOESN'T DELIVER

The Opts-Outs are an important reminder that a digital first society doesn't work for everyone.
Just five percent of the Opts-Outs engage with brands on social media, less than half the national average (11%). Just over one in five (22%) buy online at least once a week, compared to the national average of 29%.

PURPOSE, SUSTAINABILITY AND ESG DOESN'T LAND

When choosing a brand, the Opt-Outs were the least likely to choose a business for caring about the environment and society (10%) or behaving ethically (16%). Put simply, they are focused on price rather than purpose in communications.

A DISCONNECTION PENALTY?

As the Opt-Outs are more disengaged from traditional marketing channels, they can miss out on better deals, falling victim to 'loyalty penalties'. This group were most likely to be unsure whether they had fallen victim to a common range of scams, a worrying trend as businesses work harder than ever to warn customers about the risks both on and offline.

Grayling Recommends

DON'T IGNORE

It's easy to look at the Opt-Outs and ask: "Why bother?" But this could be a devastating decision for businesses, public bodies, or institutions. Whether the conversation is about public health, the best deals, or economic policy decisions (e.g., interest rate rises), this group need to be included.

THINK CLOSER TO HOME

Rather than championing loftier global and national issues in messaging directed to this group, think about ways you can support neglected regions and local areas and connect on heartland issues (e.g. economy, jobs, local services).

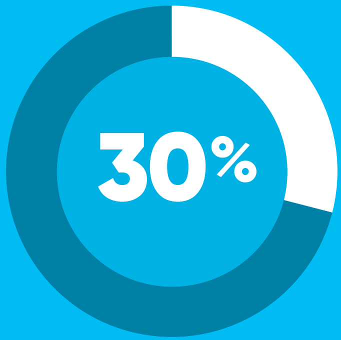
INVEST IN UNDERSTANDING

If you want to reach this group, you need to understand them. Consumer research, particularly focus groups and interviews can help understand the channels they will trust and engage with, as well as the messages that will land.

LISTEN, ADAPT AND REPRESENT

We know that the Opt-Outs are less connected to big national issues, so go hyper local, whether advertising in local newspapers or working with micro-influencers who look and feel like your target audience. Also don't ignore radio – it's an undervalued channel for reaching more disengaged and disconnected audiences. Use down to earth language and ensure imagery feels relevant.

The Plugged-In



***The Plugged-In* are both highly engaged and receptive to all aspects of communications across society and contemporary culture including from media, government, and brands. In short, they are easy to reach and the least cynical group.**

Three in ten Brits are Plugged-In, and they skew slightly more male and younger than average. Nearly half of this quadrant works full-time and are, on average, the highest earning quadrant with 44% earning over £40,000. They are also the quadrant least likely to have children (71% not being parents vs. 38%).

The majority watch TV, read online newspapers, and listen to radio on a daily basis. They are also the group most likely to regularly read print newspapers (47% do so on a weekly basis vs. 35% national average).

They have inherent faith in the trustworthiness of these sources, with an average of 60% scoring each format a 7+ out of 10 for trustworthiness. They also have a strong appetite for online and other forms of content, including daily video content and podcasts.

This quadrant is tapped into politics and current affairs (with 65% paying lots of attention) and care deeply about social issues. Three-quarters believe in stronger political interventions on the environment. They have the highest proportion of voters with 90% claiming to have voted in 2019 and have the most trust in government to act in the public interest.

The Plugged-In represent a captive audience. The challenge isn't reach but content and cut-through, with 39% consuming shopping or product content daily, meaning they have high exposure and engagement with brands.
They are the most likely to buy brand names, and half say they care about the brands they buy from – emphasising the importance of brand propositions, purpose and values for this quadrant.

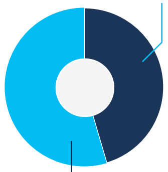
TRUSTED BRANDS:

The Plugged-In

AGE

18 - 34	23%
35 - 54	37%
55+	40%

GENDER



46% Female

54% Male

MEDIA ACTIVITY
(once a week or more)

Live TV	73%
Check social media	89%

WORKING STATUS

Retired	23%
Unemployed or not working	10%
Working full time	47%

MEDIA TOPICS
(once a week or more)

Local news	92%
Shopping & products	86%

PERSONALITY TRAITS

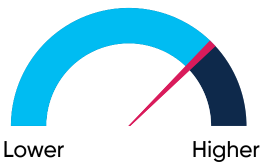
Not trusting of others	29%
Not active	34%
Not creative	38%

MEDIA TRUST
(% low trust, 0-4)

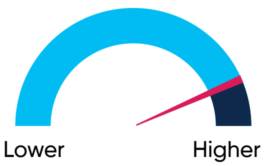
Politics	16%
Health	5%

The Plugged-In

ATTENTION TO BRANDS



POLITICAL ATTENTION



OVER-INDEXING ISSUES

Health/NHS	61 %
Enviromental issues	25 %

NEGATIVE BRAND ATTRIBUTES

Too expensive	48%
Untrustworthy	25 %

POLITICAL BELIEFS & BEHAVIOUR

- The most tuned-in to politics, with two-thirds paying lots of attention to current affairs.
- Most likely group to have voted in the last General Election and the least likely to have voted for Brexit.
- Most likely to trust that politicians make decisions in the public interest.
- Most likely to believe that the government should take steps to protect the environment even if it places additional burdens on businesses

POSITIVE BRAND ATTRIBUTES

Good value
63%

They care about their employees
11%

They behave ethically
23%

Reaching *the Plugged-In*

COMPETING FOR THEIR ATTENTION

With the highest disposable incomes, this group are the most sought after by brands and marketers. Multiple brands from each category will be vying for their attention, so organisations need to work harder to stand out.Inevitably, this battle for attention may mean the media they consume command higher

DEFINING AND COMMUNICATING PURPOSE AND ROLE IN SOCIETY

This group pay the most attention to the commitments businesses make beyond their bottom line. But in a world where most brands take a position on sustainability, ESG and societal purpose, businesses will need to work harder to stand up and stand out on purpose commitments.

DISLOYAL CUSTOMER OR NATURAL SWITCHERS

The Plugged-In are constant consumers of information, researching and comparing brands. They use a variety of sources to remain attuned to the best deals. Inevitably, this means they are likely to switch and refresh their decision-making regularly - brands can't rest on their laurels. Whether banking, insurance, supermarkets or automotive, this group will change their preference, so brands must be nimble in their messaging and always offer a better deal.

The majority watch TV, read online newspapers, and listen to radio on a daily basis.

They are also the group most likely to regularly read print newspapers.

Grayling Recommends

INTEGRATED CAMPAIGNING

This group are most likely to engage with multiple channels and media. Organisations who truly want to reach and engage this group should develop integrated campaigns, with calls to action, link to purpose and business commitments which run through the line. This means communications that align with what a business says in their annual report, through out of home marketing, PR campaigns and partnered content, whether on a podcast or in person.

DIGITAL WORKS

Digital channels offer a great opportunity to engage with the Plugged-In, who are the most active and expressive group online. 40% also say they buy online at least once a week. Around one in six (17%) of this quadrant engages with brands on social media and, as the group most likely to use social networks to express their viewpoint, could become advocates for brands online.

THAT'S ENTERTAINMENT

The Plugged-In consume a lot of entertainment, so brands need to think about how they can make the most of this medium to land their messaging. This could include online video (40% more likely to consume daily), or podcasts (50% more likely to consume weekly).

PRINT REMAINS A KEY CHANNEL

The Plugged-in are the most likely to read print newspapers (47% on a weekly basis) and 71% read online. While this format may not work for other segments, paid and earned coverage in print media remains a vital tool for reaching this sought-after group.

The Informed Sceptics

Informed Sceptics are the smallest quadrant, making up just over one in five of the UK population. This quadrant has similar levels of engagement with media, key issues and brands to The Plugged-In but showcases suspicions about content and others more in line with the Opt-Outs.

They are evenly split in terms of gender, skew slightly younger than average and are more likely to be full-time workers. They have appetite for staying informed with significant numbers consuming daily media – whether live TV (61%), online news (65%) or live radio (50%). However, they are much more sceptical about what they consume, with less than 10% highly trusting of each of those sources.

They are the most avid consumers of social media and online video with 81% and 47% engaging with these channels daily – but don't trust what they receive with 70% and 55% believing these channels are untrustworthy. Strikingly, this crisis of trust in the media they are consuming is something that seems to be more recent and growing – they are most likely to report having less trust in all media sources now than compared to two years ago.

They are the group most likely to pay 'lots of attention' to brands, but struggle to spontaneously think of any brands they trust – indicating what they are currently hearing isn't working effectively.

They are the most cynical about the government with almost three-quarters not trusting them to make decisions in the public interest. This can perhaps, in part, be explained by the fact Informed Sceptics have the highest proportion of Labour voters (40% voted Labour versus 35% voting Conservative in the last election).

TRUSTED BRANDS:

adidas
HEINZ
Boots
TESCO

The Informed Sceptics

AGE

18 - 34	25%
35 - 54	35%
55+	40%

GENDER

49% Male

51% Female

MEDIA ACTIVITY
(once a week or more)

Live TV	78%
Check social media	88%

WORKING STATUS

Retired	21%
Unemployed or not working	13%
Working full time	45%

MEDIA TOPICS
(once a week or more)

Local news	85%
Shopping & products	75%

PERSONALITY TRAITS

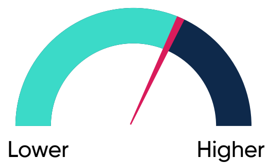
Not trusting of others	40%
Not active	42%
Not creative	43%

MEDIA TRUST
(% low trust, 0-4)

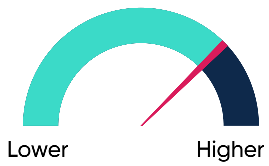
Politics	48%
Health	35%

The Informed Sceptics

ATTENTION TO BRANDS



POLITICAL ATTENTION



OVER-INDEXING ISSUES

Helath/NHS	53%
Economy	39%

NEGATIVE BRAND ATTRIBUTES

Too expensive	44%
Untrustworthy	16%

POLITICAL BELIEFS & BEHAVIOUR

- A large number voted at the 2019 General Election, slightly more than voted in the EU referendum of 2016.
- The group most likely to vote Labour and more than half voted to remain in the European Union.
- Most sceptical group towards the intentions of Government, with three-quarters believing they do not act in the public interest.
- Most likely to trust content from print newspapers less than they did two years ago.

POSITIVE BRAND ATTRIBUTES

Good value
55%

They care about their employees
11%

They behave ethically
19%

Reaching *the Informed Sceptics*

NATURAL SCEPTICS

Believability is key with this group, as they are naturally inclined to be sceptical about brands and public communications. They are most sceptical about government, with almost three-quarters not trusting them to act in the public interest and are more likely to be critical of measures in response to Covid-19. Again, this presents risks for future public health messaging.

A GROWING CRISIS OF TRUST IN MEDIA

Their distrust of media is a growing trend. They are the most likely group to report having less trust in all media sources than two years ago. This has implications for all organisations looking to reach this segment.

THE BRAND CONUNDRUM

Informed Sceptics are the group most likely to pay 'lots of attention' to brands, yet are less-than-average buyers of branded products – indicating that what they are currently hearing isn't working effectively. We know they are consuming content, but it's clearly not cutting through.

PRICE OVER PURPOSE

Informed Sceptics have a lot in common with the Opt-Outs when it comes to distrust for brand narratives around purpose and ESG. They are another group with whom businesses would do better to focus on price and value, especially in the current economic climate.

> They are the most avid consumers of social media and online video with 81% and 47% engaging with these channels daily

Grayling **Recommends**

BE PART OF CONTEMPORARY CULTURE

This group spends lots of time consuming media online and offline, but aren't necessarily looking for corporate or brand content. In response, businesses need to develop campaigns which align with the trends and themes that matter to them. This is especially important for businesses that want to earn fame and meaning with Informed Sceptics.

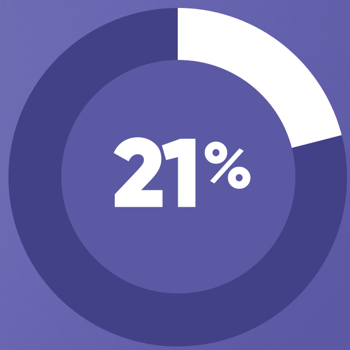
CUT-THROUGH, CUT-THROUGH, CUT-THROUGH

As this groups consumes a lot of content, the challenge isn't in reaching this group but cutting through to them. Investing in behavioural research to understand how this group engage with content both online and offline, as well as what messages and approaches cause them to switch off, will be key.

SOCIAL MEDIA SAVVY

Informed Sceptics are also the most avid consumers of social media and online video, with 81% and 47% engaging with these channels daily. If you can master the messaging to connect with this group, these are the channels to invest in – whether for brands, governments or other organisations.

The Loyalists



The Loyalists make up over a fifth of the UK population. With the majority (62%) being women and 50% being over 50. They prioritise other things in their life over engaging with content and, as a shortcut, are happy to fall back on fewer trusted sources.

The Loyalists skew towards higher earners, with 58% of the quadrant earning over £30,000 (49% of the national average), giving just over half of them £200 to spend every month after essentials.

The group are the second lowest consumers of media. While they sit at the national average for watching TV, they engage with online or print media at a significantly lower level.

They also under index on their use of social media and other content formats like podcast, videos and non-news sites. When it comes to trusting media, the group has high trust and stable views in the sources they are using, and will not engage with sources they don't trust, indicating their tendency to both form and stick to strong preferences when consuming content.

Although the group fall slightly below the national average in their desire to stay informed on current affairs, they do see other social issues as important, particularly healthcare and the NHS.

The Loyalists are likely to stick with brands they like and trust, with their top factors being trustworthiness, environmental, and social credibility. Brands looking to engage with Loyalists need to earn their trust but also find ways to disrupt their existing preferences and connect with them.

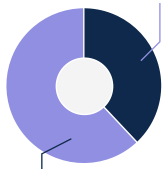
TRUSTED BRANDS:

The Loyalists

AGE

18 - 34	18%
35 - 54	32%
55+	50%

GENDER



38% Male

62% Female

MEDIA ACTIVITY
(once a week or more)

Live TV	80%
Check social media	76%

WORKING STATUS

Retired	27%
Unemployed or not working	13%
Working full time	39%

MEDIA TOPICS
(once a week or more)

Local news	78%
Shopping & products	62%

PERSONALITY TRAITS

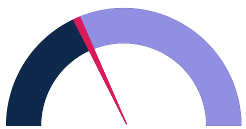
Not trusting of others	29%
Not active	33%
Not creative	47%

MEDIA TRUST
(% low trust, 0-4)

Politics	16%
Health	4%

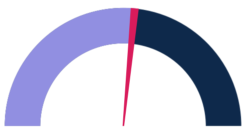
The Loyalists

ATTENTION TO BRANDS



Lower Higher

POLITICAL ATTENTION



Lower Higher

OVER-INDEXING ISSUES

Health/NHS	64%
Enviromental issues	25%

NEGATIVE BRAND ATTRIBUTES

Too expensive	53%
Untrustworthy	20%

POLITICAL BELIEFS & BEHAVIOUR

- More than eight in ten voted in the 2019 General Election with a similar amount voting in the 2016 EU Referendum.
- The group most likely to have voted Conservative at the 2019 General Election.
- Six in ten do not belive that the Government makes decisions with society's best interests at heart.
- For nearly two-thirds, health is the top priority facing the country, higher than any other group, and no surprise given the average age of this group.

POSITIVE BRAND ATTRIBUTES

Good value
65%

Trustworthy
39%

They behave ethically
22%

Reaching *the Loyalists*

LOYAL CUSTOMERS

The Loyalists aren't that open to change when it comes to brand decisions. They are the most likely to buy brands that they already like and trust. Comfortable in their decisions, nearly half of this group pay limited attention to brands, posing a big challenge to brands who want to encourage them to switch.

DON'T DO DIGITAL

This group skew older (50% are over 55) and perhaps as a result are less likely to use online, digital and new media. Paid social, podcasts or online print aren't the way to reach this group.

HIGH EARNING CONSUMERS

This group might not be easy to reach or keen to switch, but there are rewards for brands who can communicate with them. They are one of the highest earning segments, with 58% earning over £30,000 and this is reflected in their disposable income.

FOCUSED ON VALUES AS WELL AS VALUE

Similarly to the Plugged-In, Loyalists also over-index on factoring brands' environmental and social credibility into their decision making.

> They prioritise other things in their life over engaging with content and, as a shortcut, are happy to fall back on fewer trusted sources

Grayling **Recommends**

UNDERSTAND THE DRIVERS OF TRUST

This group are the most likely to identify trustworthiness (39%) as one of the most important attributes when choosing a brand. If earning their trust is key, businesses need to use quantitative research – for example focus groups – to understand what drives that trust.

LIVE TV AND RADIO WORKS BEST

In short, this group are much less likely to use channels they don't trust, or perhaps don't feel comfortable with – for example new media. The best channel to use to reach Loyalists is TV, with 59% watching daily.

FOCUS ON PURPOSE ESG AND SUSTAINABILITY

It's no surprise that John Lewis come up as one of the most trusted brands for this group. Businesses that want to connect with this group should ensure that they can clearly articulate the role they play in communities, society and for their employees.

The Dis/Connected Consumer Index

FOR FURTHER INFORMATION ON HOW YOU CAN REACH THESE IMPORTANT COHORTS, PLEASE CONTACT:

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GRAYLING
creating advantage

Grayling is the world's local communications agency. With 30 offices around the world, it has the reach, influence and infrastructure of a global agency, with the creativity, connections and cultural know-how of a boutique.

Combining a breadth of expertise across consumer, corporate, public affairs, digital and creative services, with proprietary technologies and an inclusive culture, Grayling develops and delivers award-winning communications campaigns that create advantage for its clients.

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Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and overcome strategic challenges – helping them to get to grips with the world in which their brands operate.

We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes.