

said & done

The Purpose Reckoning

Talking impact in a charged
and challenging climate

Research with UK business leaders

In collaboration with  HUMAN KIND
RESEARCH



This is a reckoning moment for businesses who've gone big on 'purpose'. The climate is politically charged and commercially challenging. The pressures are coming from all sides.

Our research with over 300 senior leaders of UK-based businesses provides a snapshot of that moment, and a picture of where this is all heading.

Yes, many business have dialled down the volume on issues they were once loud and proud about. And this goes deeper than just external comms.

That is one story.

But there is also another story. Of a 'silenced majority' who – despite the circumstances – still believe their business should be led by purpose and outspoken on issues that matter.

Here is former Unilever CEO Paul Polman's take on where we find ourselves:

"Having a bit of pushback against things like ESG and DEI are – to some extent – healthy. It doesn't mean we need to abandon it. It doesn't mean we need to stay silent. It just means we have to think a little bit more."

– Interview on 'Purpose 360 with Carol Cone', episode 200 (May 6 2025)

This isn't the end of purpose. But it might be the end of the version we've been sold. And a chance for something more enduring to take its place.



Dave Vann
Owner, said & done

With thanks to our partners



Definition

‘Your company’s reason for being beyond making money; the positive impact you have on the world’

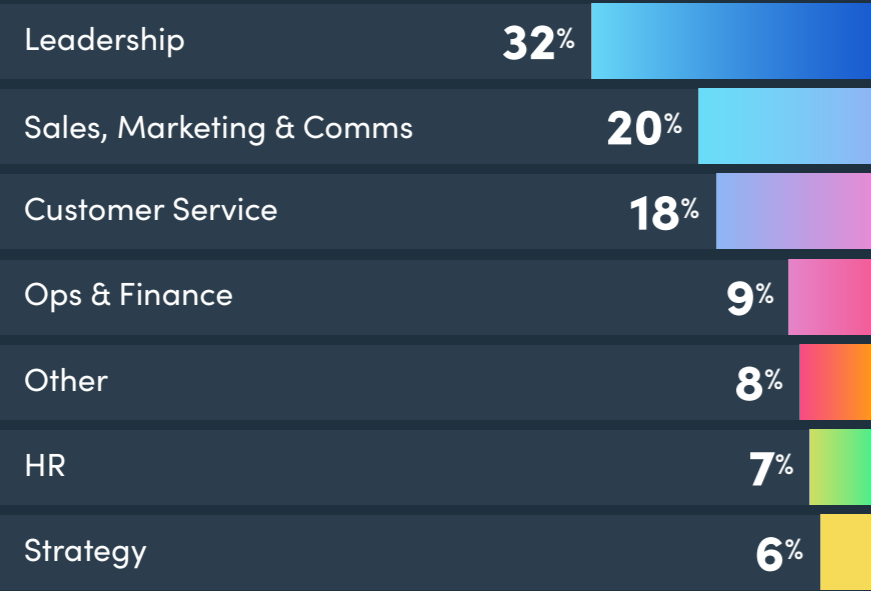
To ensure a common starting point for our research, we used the above definition of ‘purpose’ for both our online survey and interviews

Our methodology

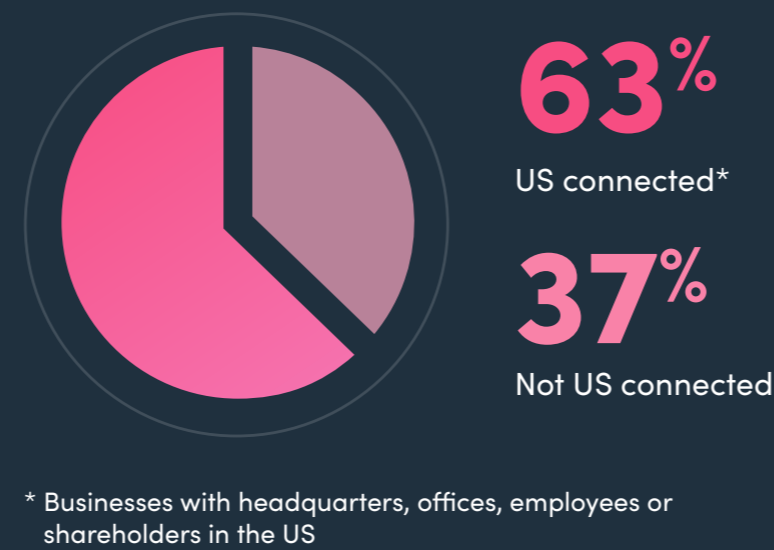
Our research was undertaken between April – June 2025 with 300+ senior leaders of UK-based businesses across a range of sectors.

- Survey with 287 leaders
- ‘Closed door’ sessions with 30+ leaders of mid-to-large sized consulting firms
- 1:1 interviews with 10 industry thought leaders

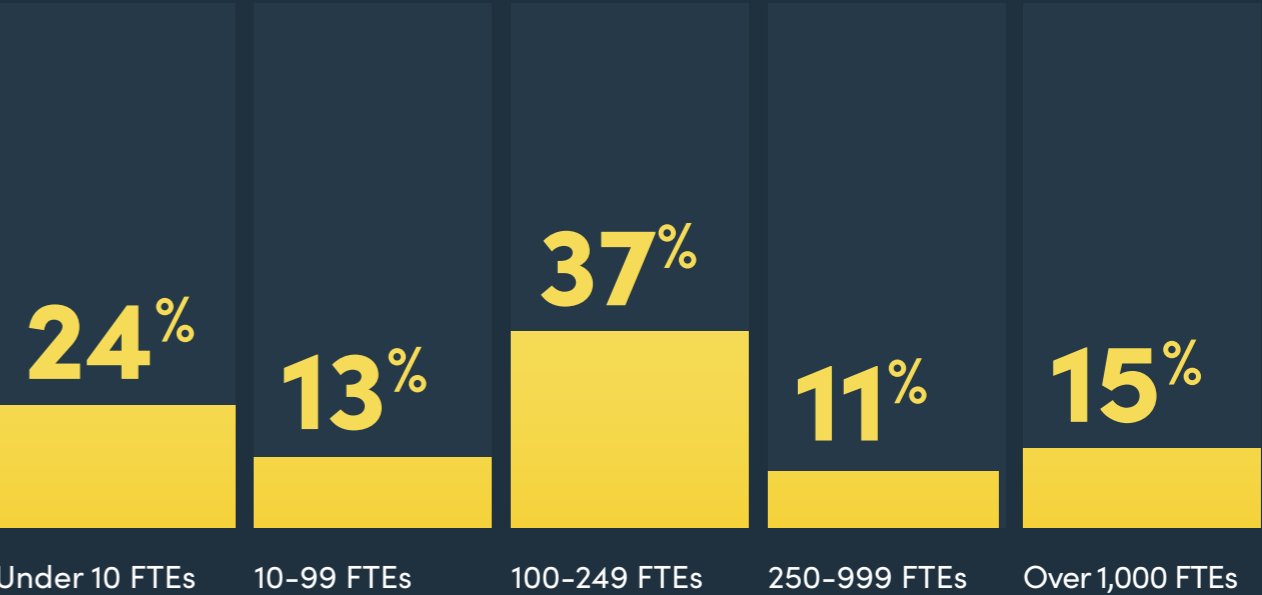
Survey respondents by dept/function



Survey respondents by US connection



Survey respondents by company size (no of FTE)



The big insights

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Insight 01

When it comes to speaking out on the issues, most leaders believe *more is more*

Not only have companies been speaking out on vocal on social & environmental issues in recent years, their leaders wish they had done so *more* – not less.



Insight 01 *‘More is more’*

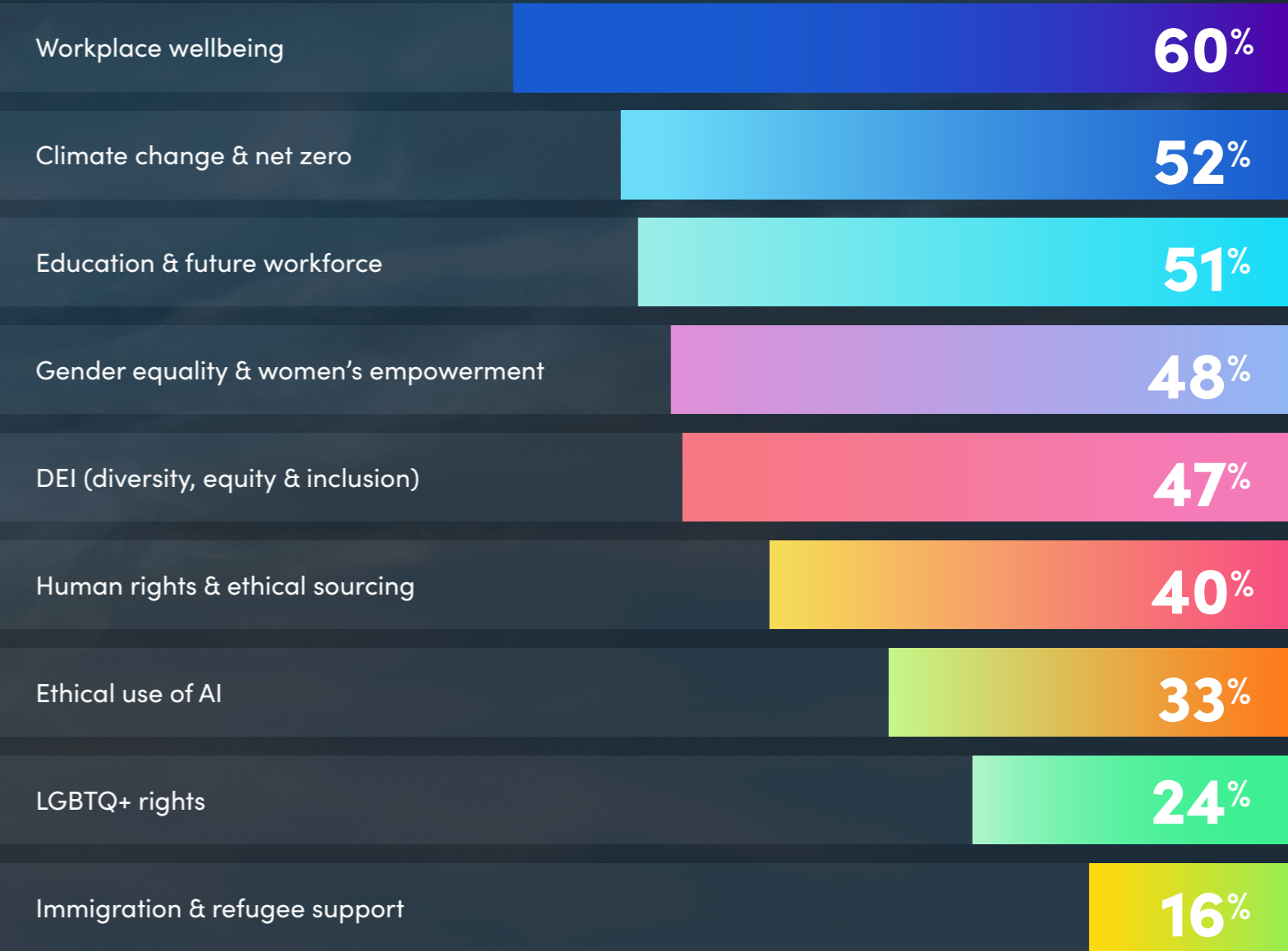
Workplace wellbeing has become the ‘go-to’ issue for companies in recent years – with 60% of leaders claiming it had featured within their external comms.

The potentially ‘sensitive’ topics of DEI and Net Zero have also featured prominently – albeit with small businesses more than large, and with non-US connected businesses more than US connected ones.

Large businesses are *3x more likely* to have profiled *LGBTQ+ rights* and *immigration & refugee support* compared with small businesses – highlighting how some social issues are either too disconnected, or too divisive, for small businesses to speak out on.

Statistics

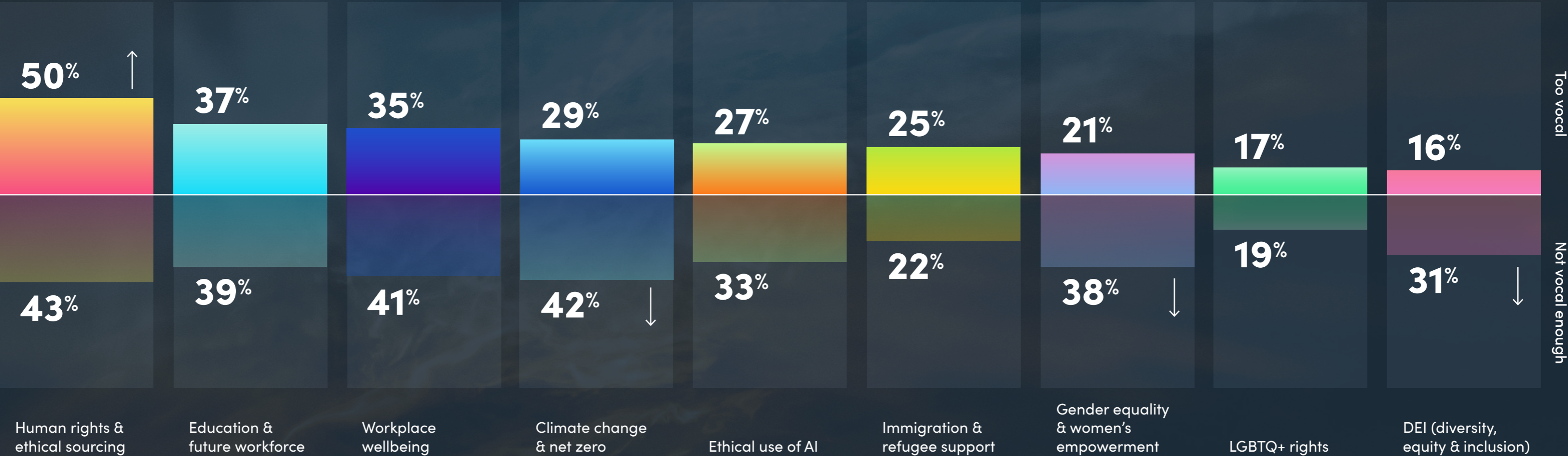
In recent years, which of the following have featured within your external communication (outside of reporting)?



Insight 01 *‘More is more’*

Interestingly, *human rights & ethical sourcing* is the only issue where leaders felt the business had, on balance, been too vocal in the past. In fact, there’s a clear sense that leaders wish their business had been *more* vocal around issues like *net zero*, *DEI* and *gender equality* when it was easier to speak out – before the climate became charged and challenging.

On what issues has the company been too vocal / not vocal enough?



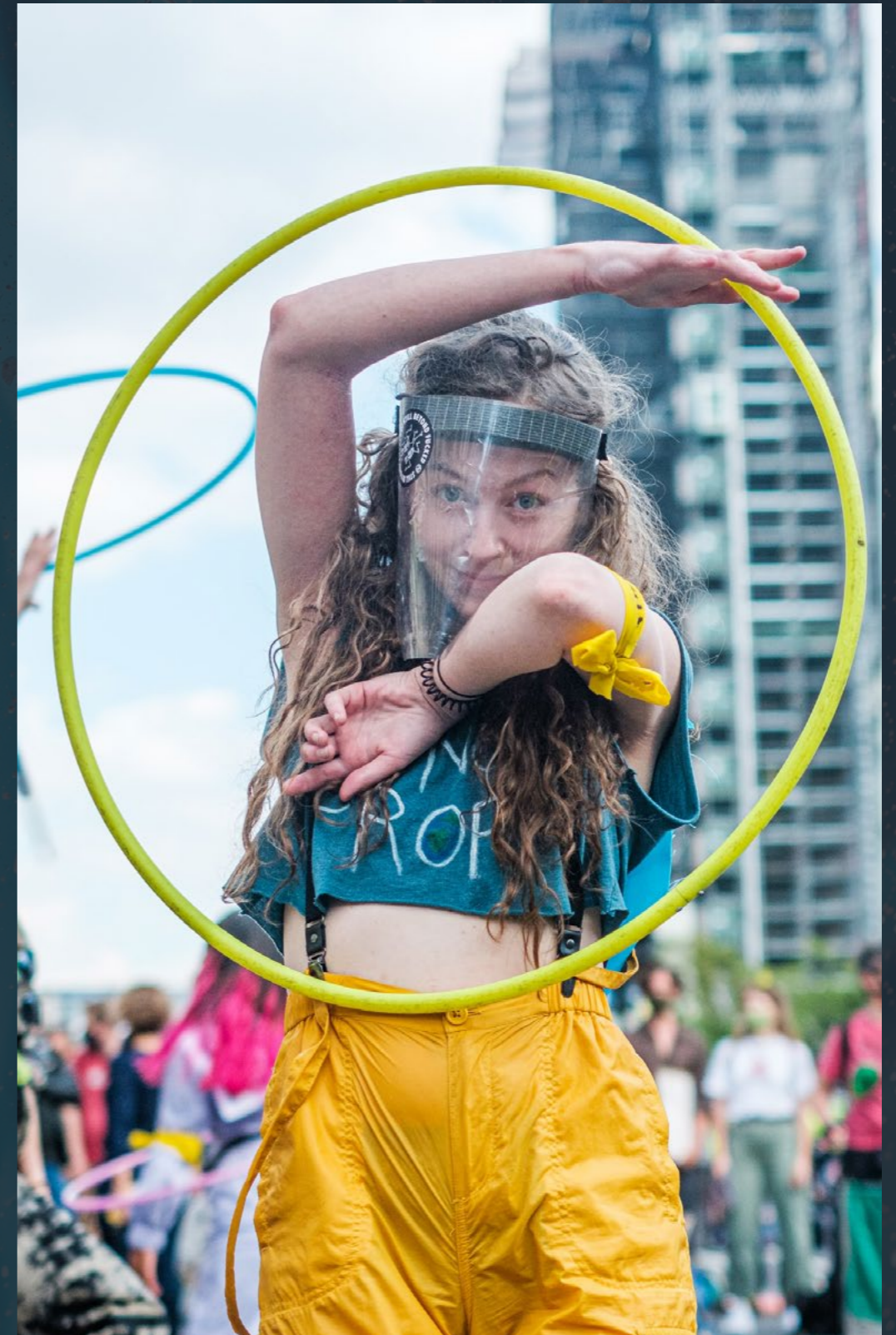
Insight 01 *'More is more'*

“Businesses should be communicating around issues that are important to them, where they are doing good work. As long as it isn't performative, why shouldn't they take a position?”

- *Alexandra Evreinoff • Managing Director, INvolve*

“We are not afraid to speak out on contentious issues, particularly when we have clear evidence supporting our claims”

- *Leader of healthcare business (large; not US connected)*



Insight 02

UK businesses are catching the *'dial back cold'* from their US counterparts

Despite enthusiasm for their business to speak out, *nearly 1 in 2* leaders admit their business has dialled back on social & environmental issues within its external comms.



Insight 02 *'Dial back cold'*

The aspiration of most leaders for their business to speak out has come face-to-face with the reality that many (47%) are now dialling back.

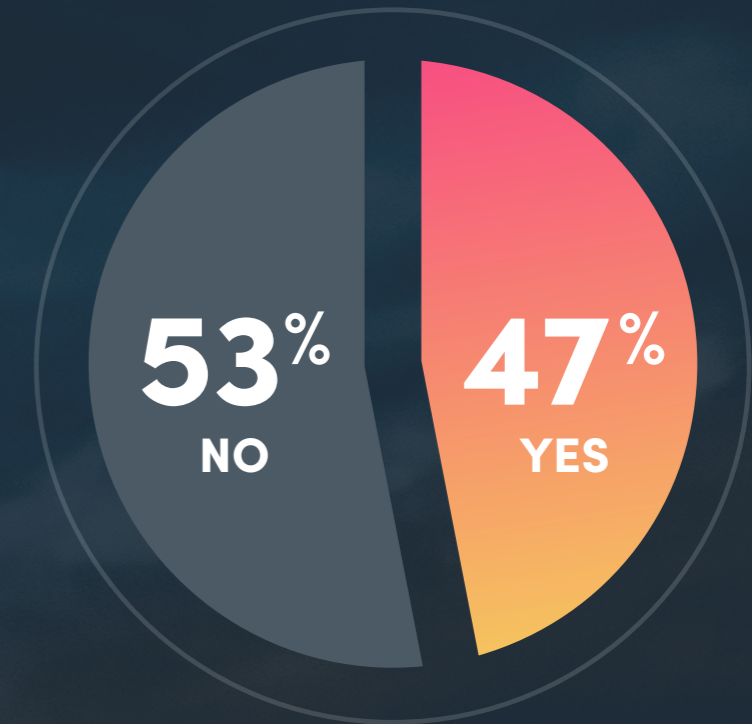
That trend is even more pronounced for large businesses (63%) and those with a US connection (60%) – a reminder that these companies are the ones on the front line of the current pushback.

When we asked leaders of companies who were *not* dialling back whether they thought others in their sector were, 48% agreed.

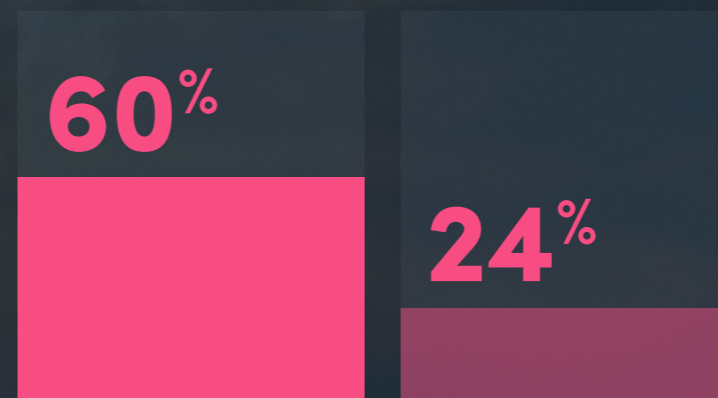
The message is clear: the pushback is affecting the many, not just the few.

Statistics

More recently, has your company dialled back on social & environmental issues within its external comms?



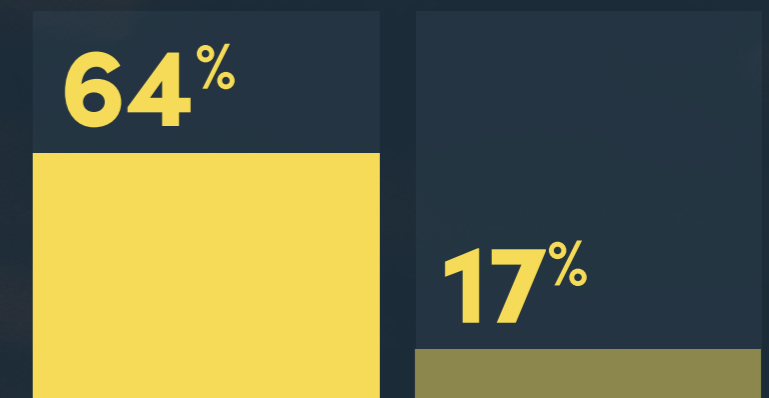
'Yes' (by US connection)



Connected to US

No US connection

'Yes' (by company size)



Over 100 FTEs

Under 100 FTEs

Insight 02 'Dial back cold'

“A lot of leaders are in a really conflicted space right now. They’re trying to work out where this is heading, and what they should be doing. It isn’t easy...”

- *Kate Adams • Chief Impact Officer, Conscious Capitalism*

“We have been more vocal in the past but are shying away from communicating our stance in light of recent events”

- *Leader of professional services business (large; not US connected)*

“People are a lot more nervous about the message they are putting out, about the language they are using. Particularly if they have a base in the US...”

- *Leader of professional services business (large; not US connected)*



Insight 03

Net zero is in the crosshairs, but other issues are also in retreat

Of those who admit their business is dialling back, nearly 1 in 2 identify net zero as an issue in the firing line. However, businesses are also retreating on other issues they had previously been outspoken on.



Insight 03 ‘Issues in retreat’

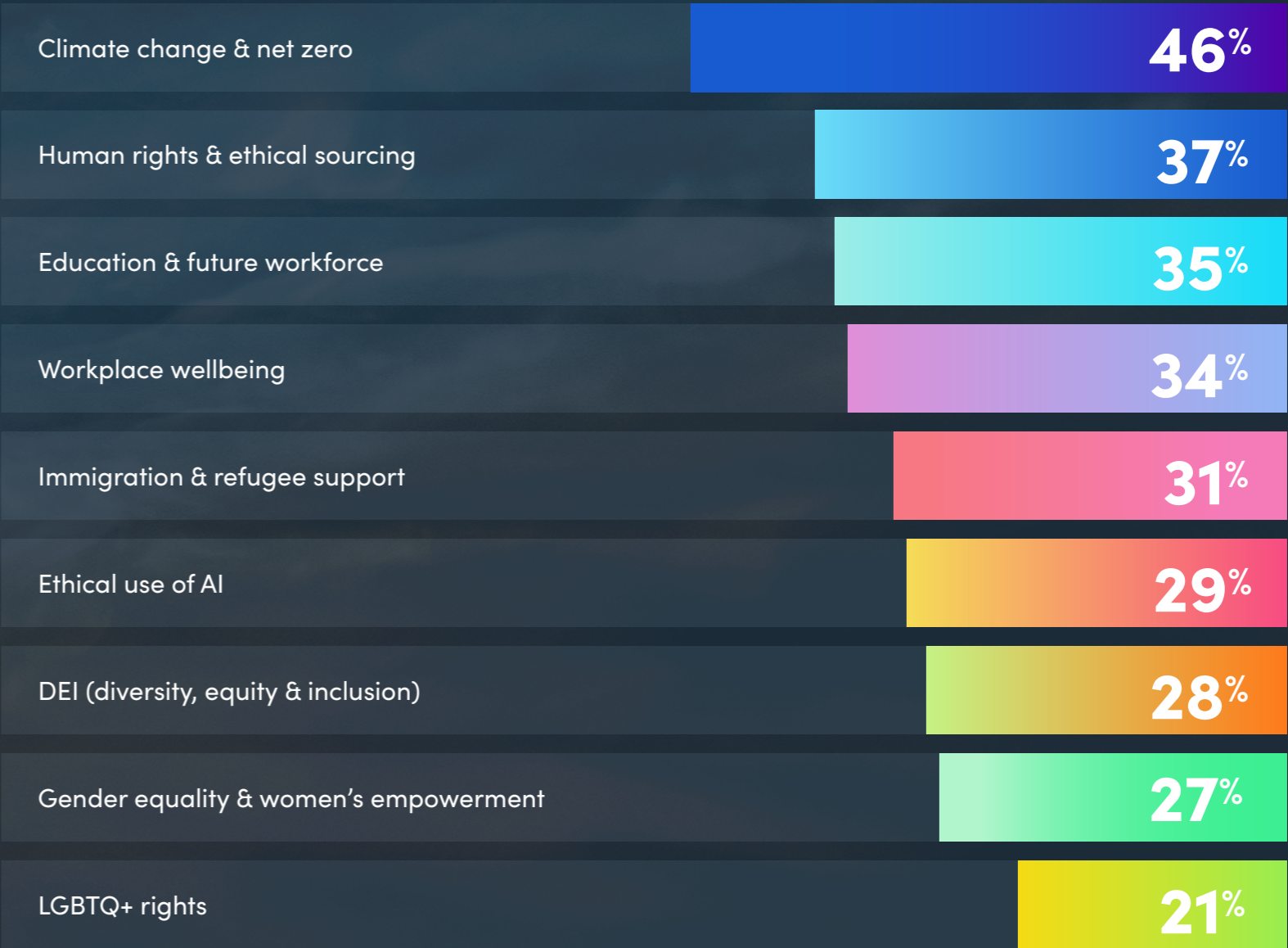
Businesses are also going quiet on other issues where leaders feel the company has been too outspoken in the past.

Interestingly, it’s not the politicized issues that are most in retreat. The more ‘common ground’ issues like *human rights & ethical sourcing*, *education & future workforce* and *workplace wellbeing* are where over 1 in 3 leaders admit their business is dialling back.

In this climate, it seems businesses are more reluctant to make public promises or proclamations around how they look after their current and future workforce – lest they struggle to match those words with actions.

Statistics

Which issues have previously featured, but are now being dialled back?



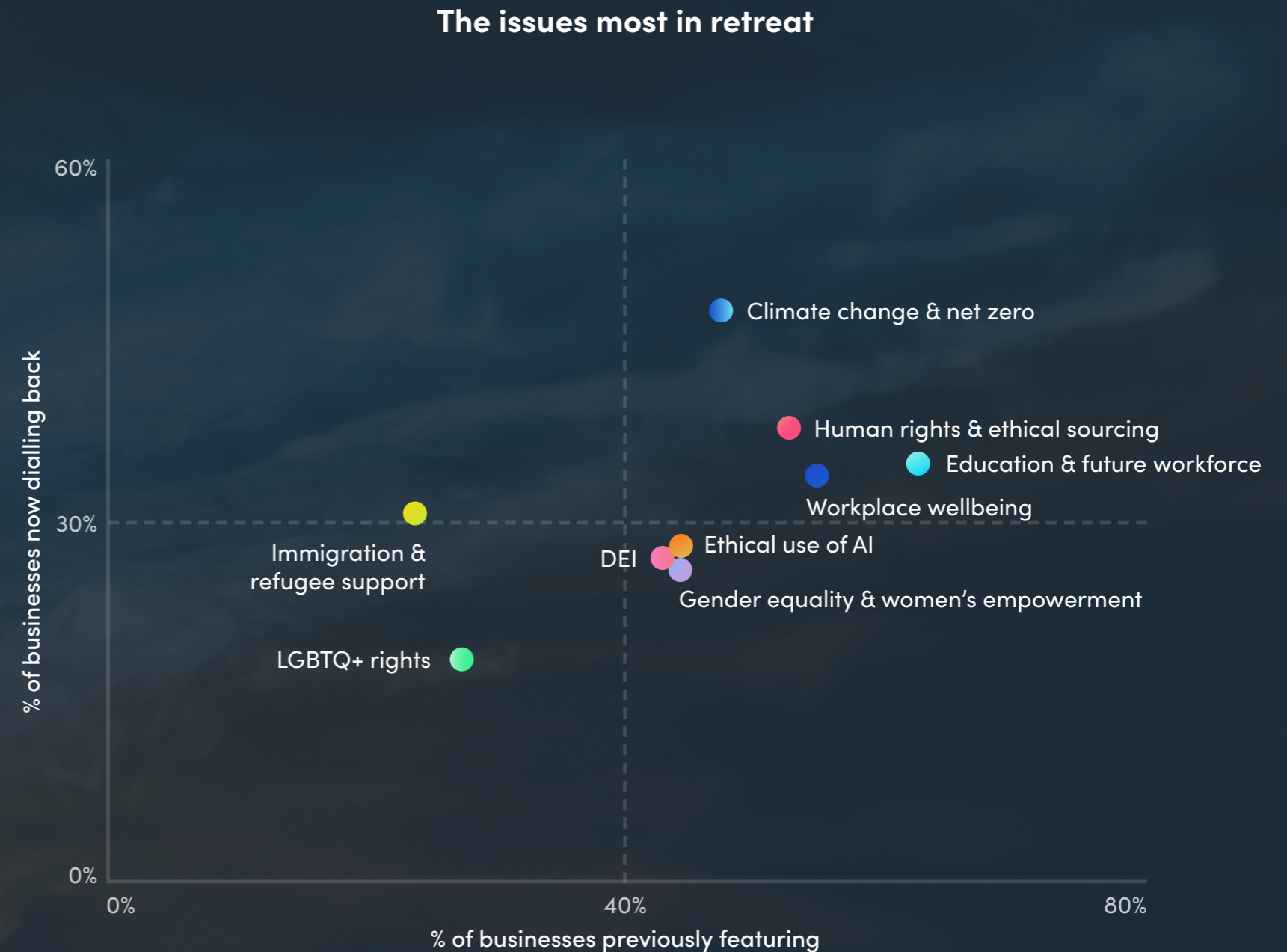
Insight 03 'Issues in retreat'

When it comes to how far a topic has travelled from being featured to being dialled back, its issues like *education & future workforce*, *workplace wellbeing*, and *human rights & ethical sourcing* that have regressed the furthest.

The warnings signs were already there – with leaders most likely to single out these same issues as those which the company had previously been too vocal about.

It highlights the reality that it isn't just headline topics like *DEI* and *net zero* where leaders have decided it's time the business piped down.

Statistics



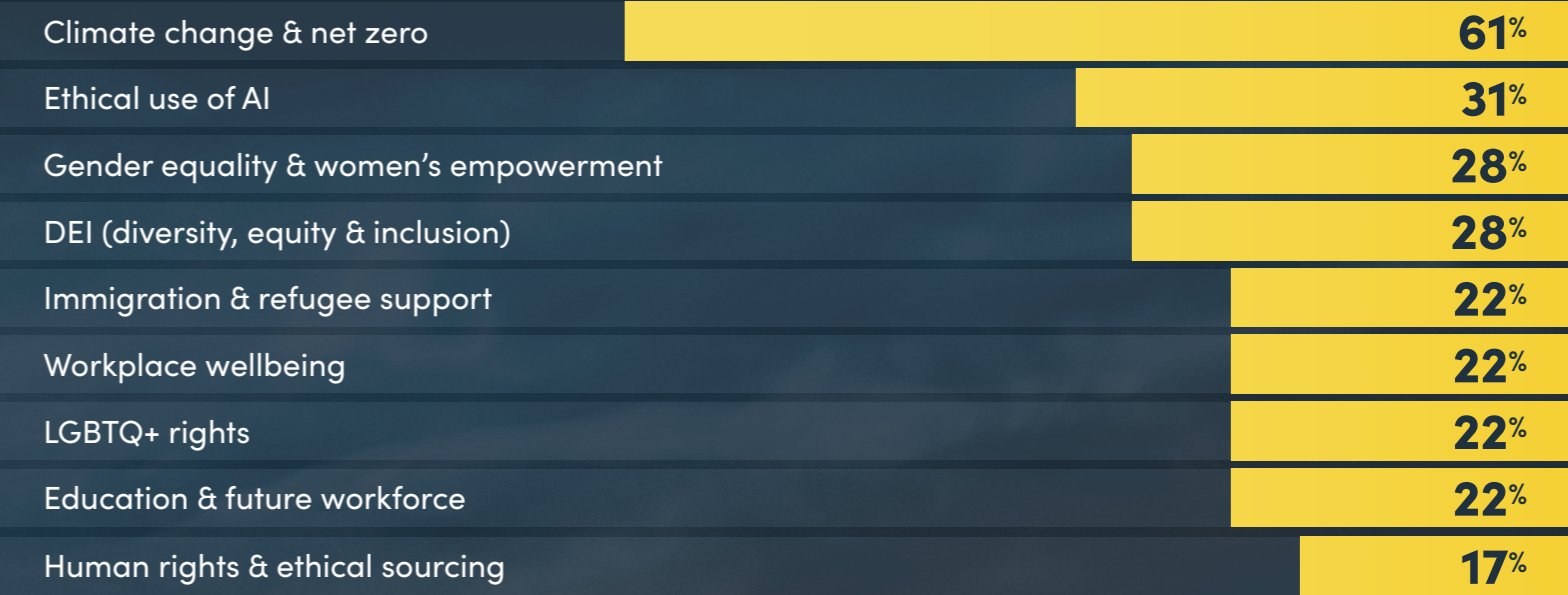
Insight 03 ‘Issues in retreat’

For small businesses, there is only one issue which more than 1 in 3 have dialled back on – *net zero*. Interestingly, *ethical use of AI* is the 2nd most dialled back issue, highlighting unease amongst small business leaders when it comes to taking a public stance on this topic.

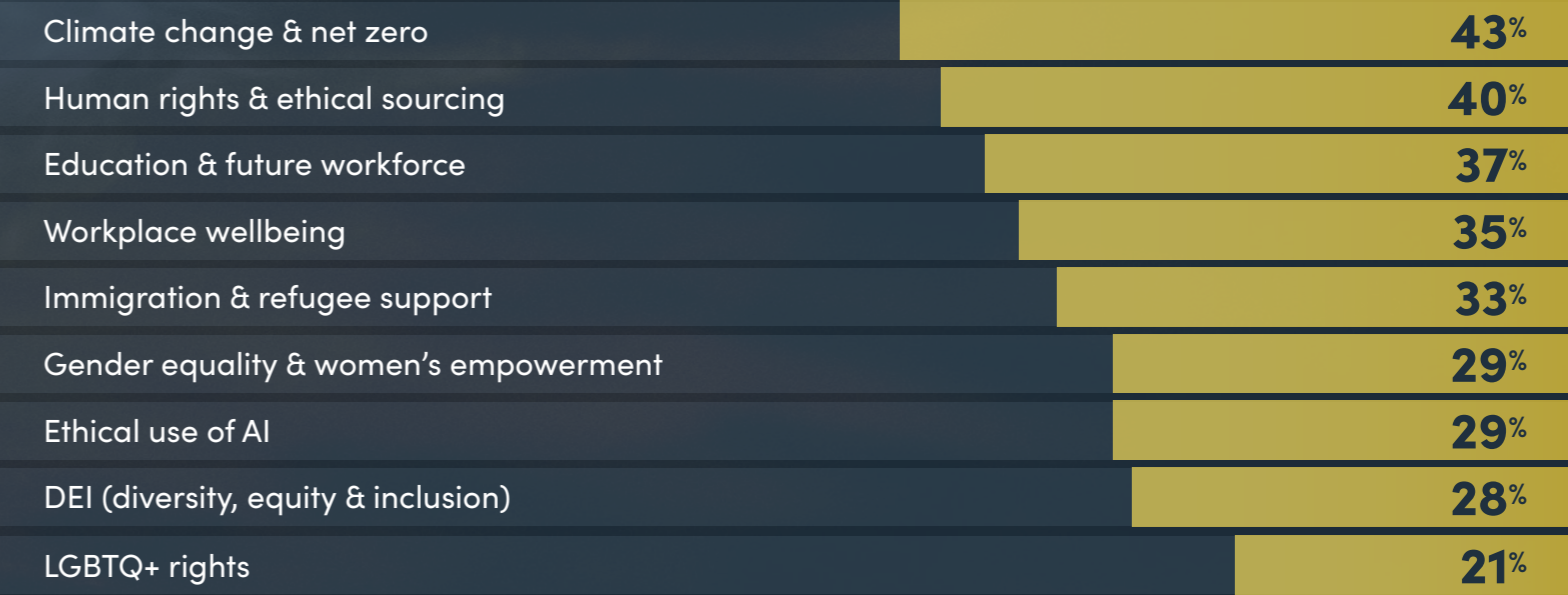
For large businesses, there are five issues which more than 1 in 3 have dialled back on. As well as issues that have been in the headlines, 35% of large businesses are going quiet on *workplace wellbeing* – a reminder that this previous ‘go-to’ topic has become more sensitive as companies reconsider their working from home policies.

Statistics

Issues in retreat (under 100 FTEs)



Issues in retreat (over 100 FTEs)



Insight 03 ‘Issues in retreat’

For non-US connected businesses, there are only 2.5 issues being dialled back on average. The issue most in retreat? *Net zero* – where *over two thirds* are dialling back. Only one other issue (*ethical use of AI*) was cited by over 30%.

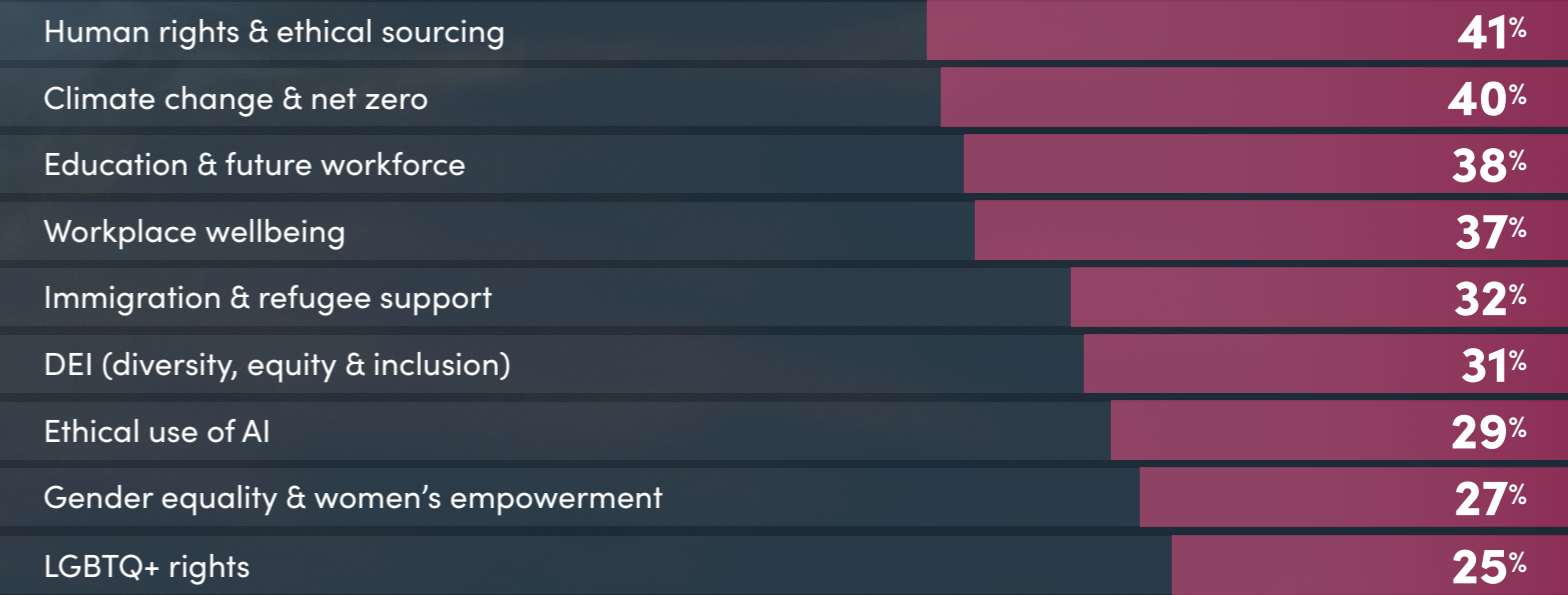
For US connected businesses, there are 3 issues being dialled back on average. In line with their concerns around being too outspoken, the main losers are *human rights & ethical sourcing* (41%), *net zero* (40%), *education & future workforce* (38%) and *workplace wellbeing* (37%). It’s a reminder that a US connection brings pressure to dial back further, and to dial back broader.

Statistics

Issues in retreat (non-US connected)



Issues in retreat (US connected)



Insight 04

Think the dial back is just
about brand and comms?
Think again.

Is the dial back about style...or actual substance? A shift in language...or a change in approach? From our 1:1 interviews and online survey, it's clear this goes much deeper than just comms.



Insight 04 *'More than comms'*

Of those leaders whose businesses are dialling back, 86% admit this is about more than just external comms.

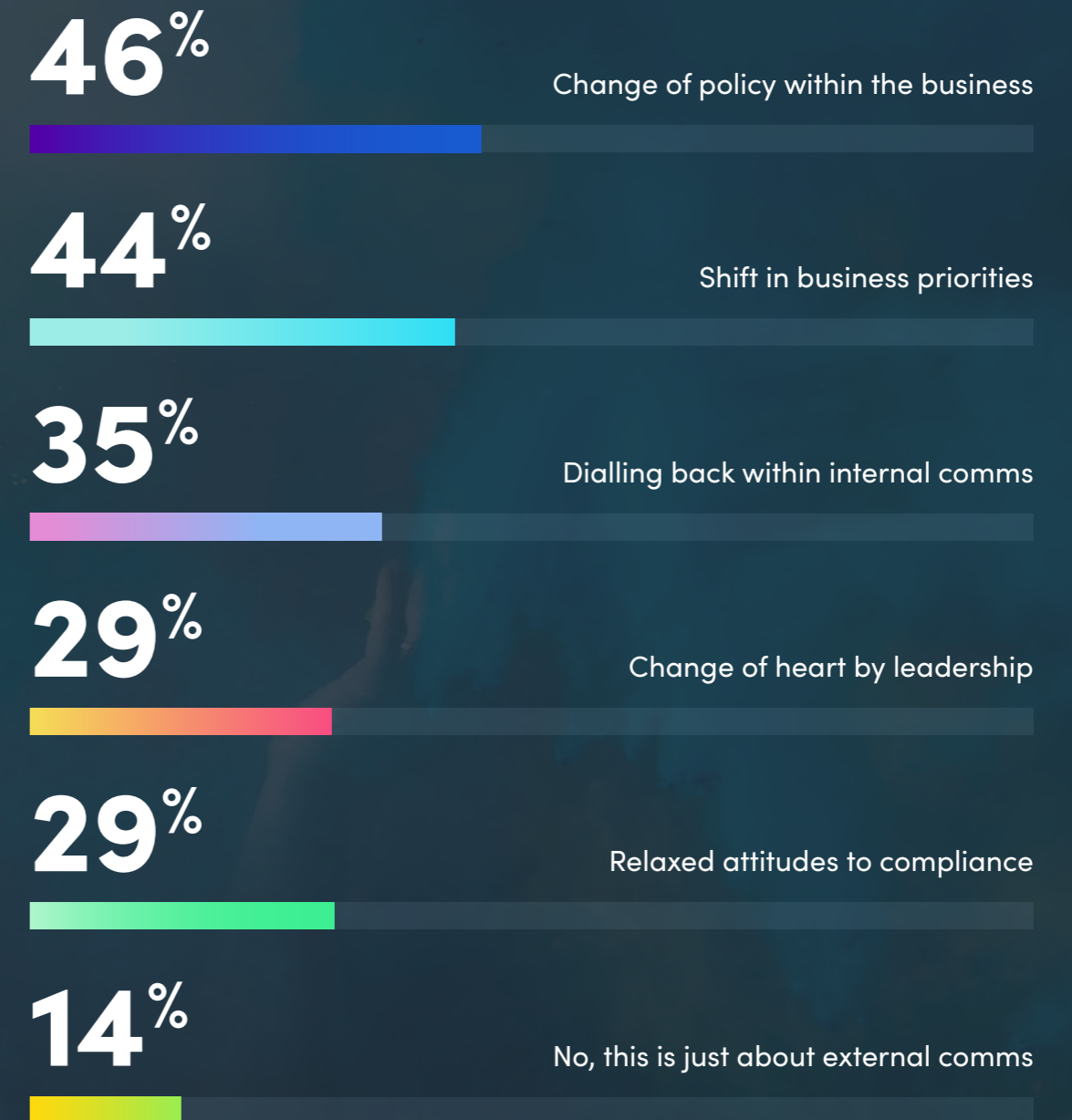
Those are striking numbers – echoed by interviews where leaders express surprise at how quickly, and deeply, their business has retreated on issues it had previously been very vocal on.

The biggest concern for social impact advocates? *'Change of policy within the business'* is the #1 shift taking place behind-the-scenes (46%). On the bright side, only 29% believe their leadership has had a change of heart on these issues.

It all points to leaders under pressure to rethink more than just their rhetoric, even if – for many – they appear to be doing so with personal reluctance and regret.

Statistics

Is there more going on than external comms?



Insight 04 'More than comms'

“We are a purpose-led organisation and this is not going to change. What is changing is how we’re communicating externally to ensure we’re not alienating clients and other organisations...adjusting our language, but not our mission or beliefs.”

- Leader of media business (small; not US connected)

“Many corporations are being extremely cautious about their approach to DEI right now. Leaders want to do the work, but they’ve given power to legal to make the call.”

- Suki Sandhu OBE • Founder and CEO, INvolve and Audeliss



Insight 05

The reasons for retreating? Leaders are being *squeezed* from all sides

The economy. Culture wars. Public backlash.
Shareholder pressure. Leaders are under
pressure from every angle, struggling to
balance competing demands.



Insight 05 ‘Reasons for retreat’

What’s driving the retreat? For smaller businesses, it’s all about the money. This group are more likely to cite ‘*challenging financial picture*’ and ‘*wider economic uncertainty*’ than large business leaders.

For leaders of large businesses, there are pressures across the board – with ‘*media or public backlash*’ the biggest factor (34%) along with ‘*reduced employee interest*’ (31%) and ‘*difficulty standing out in a crowded purpose market*’ (29%) – factors that don’t really come into play for leaders of small businesses.

Statistics

The main drivers for dialling back (by company size)



Insight 05 ‘Reasons for retreat’

When it comes to the drivers for dialling back, the company’s relationship with the US is the biggest factor. Those not connected to the US are more likely to point to commercial drivers and downplay other factors – citing 2.3 reasons on average.

Those connected to the US have different – and more – drivers in play. They are almost 5 x more likely to highlight ‘media or public backlash’ and 2 x more likely to cite ‘concerns around inauthenticity’. They are also selecting 3 reasons on average.

Statistics

The main drivers for dialling back (by US connection)



Insight 05 'Reasons for retreat'

“Businesses have ridden the wave, but as soon as the political winds change they have a big PR problem on their hands. They end up wishing they hadn’t been so vocal.”

- *Timothy Henry • CEO, Conscious Capitalism*

“Our main purpose is to support the sector and help it survive. So broader ‘purpose’ driven work has to take a back seat to that overarching goal.”

- *Leader of education business (large; US connected)*



Insight 06

When it comes to talking purpose, companies are dividing into *one of four 'camps'*

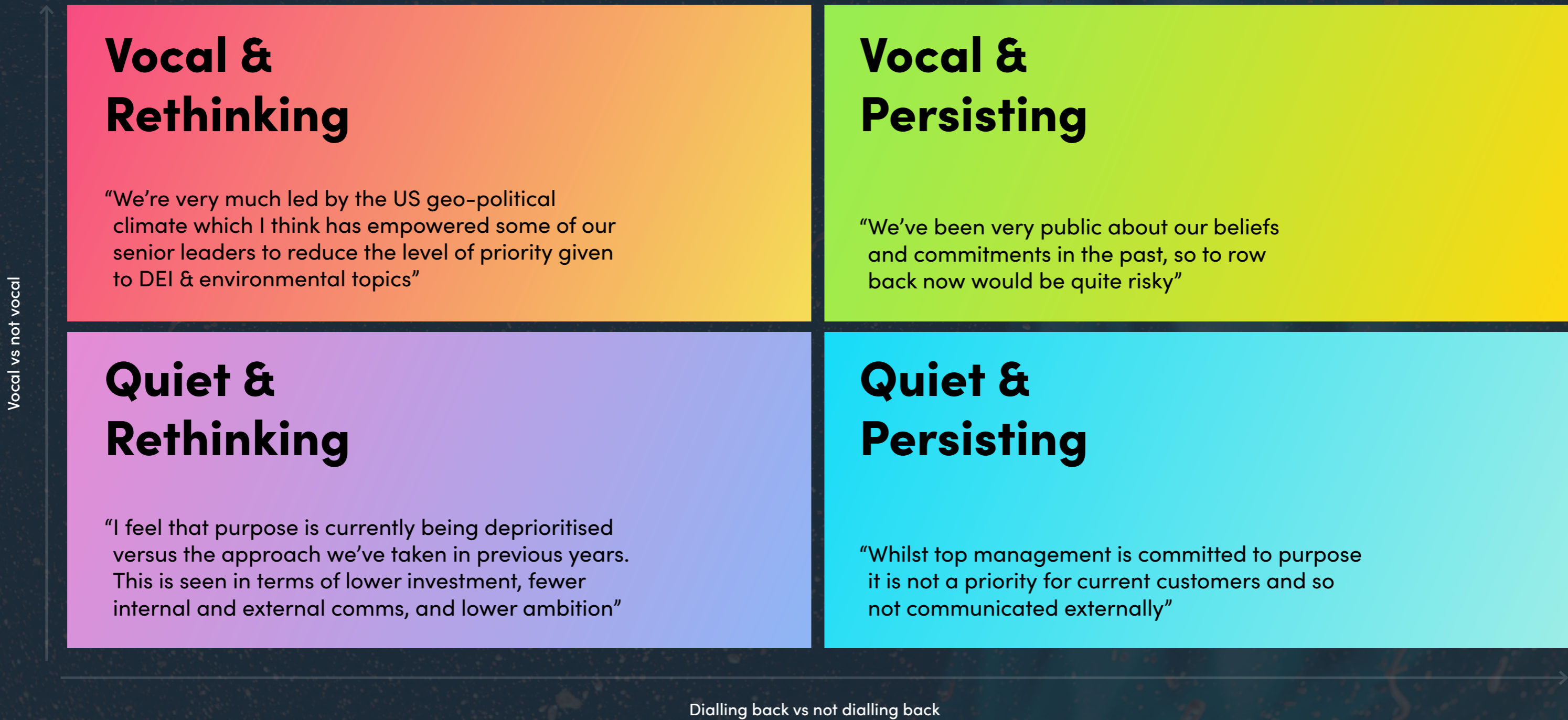
Where you vocal or quiet in the past? Dialling back or staying the course now? The answers determine which of the four 'camps' your business finds itself in...



Insight 06 ‘The four camps’



Insight 06 *‘The four camps’*



Insight 07

Dialling back comes with consequences, and the *chance to course correct*

Virtually all leaders admit there will be consequences for dialling back. However, many also see this as an opportunity for some necessary course correction.



Insight 07 ‘Consequences & course correct’

Overall, leaders seem more concerned with *internal* consequences of dialling back – such as ‘*difficulty attracting & retaining talent*’ (53%) and ‘*loss of alignment with values*’ (51%).

Small business leaders are more likely to raise *external* concerns such as ‘*reputational damage or loss of trust*’ (60%) and ‘*falling behind competitors who remain focused on purpose*’ (60%).

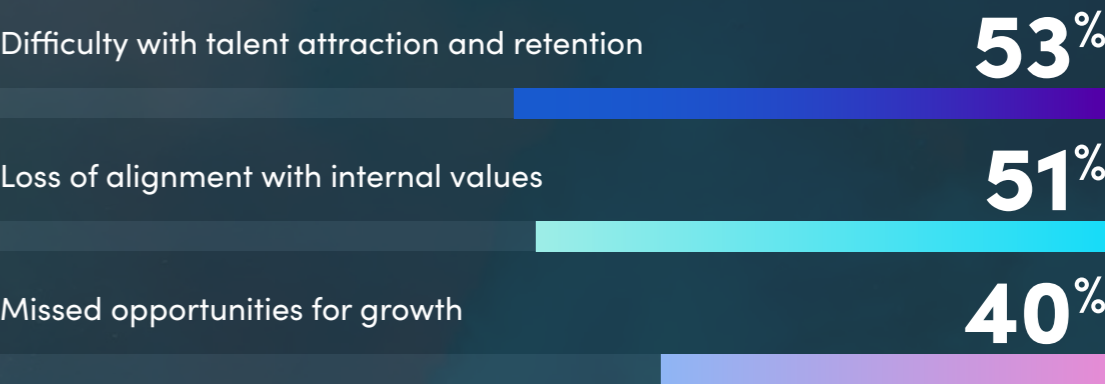
Small business leaders also cite more consequences on average (4.0) than leaders of large businesses (3.1) – a reminder that small businesses have less financial headroom to weather the fallout of being too outspoken.

Behind the data around negative consequences, leaders also see an opportunity to regroup and consider: ‘How could we do this better?’

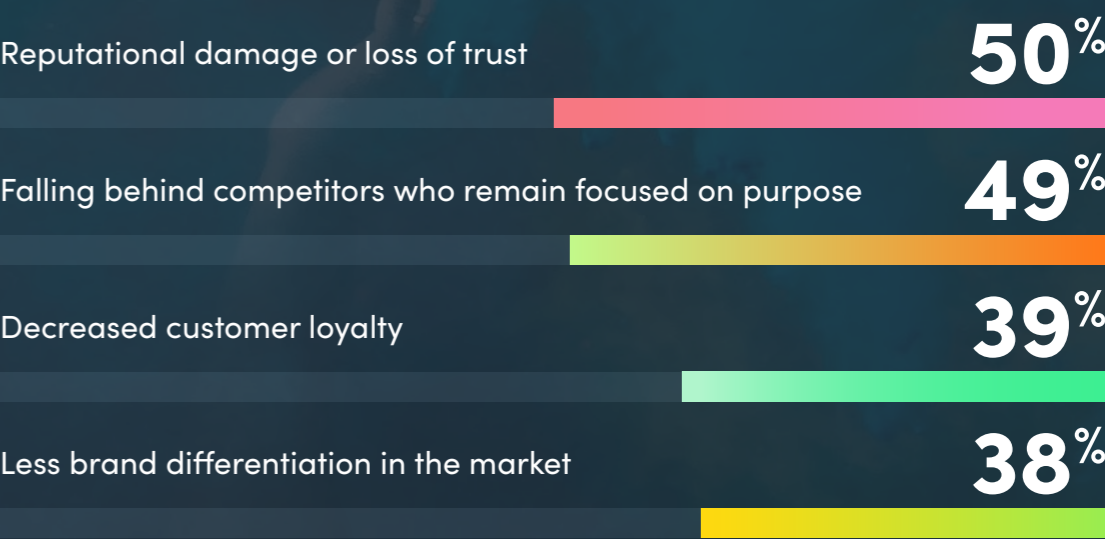
Statistics

What might the future implications be for businesses who dial back on social & environmental issues?

Internal



External



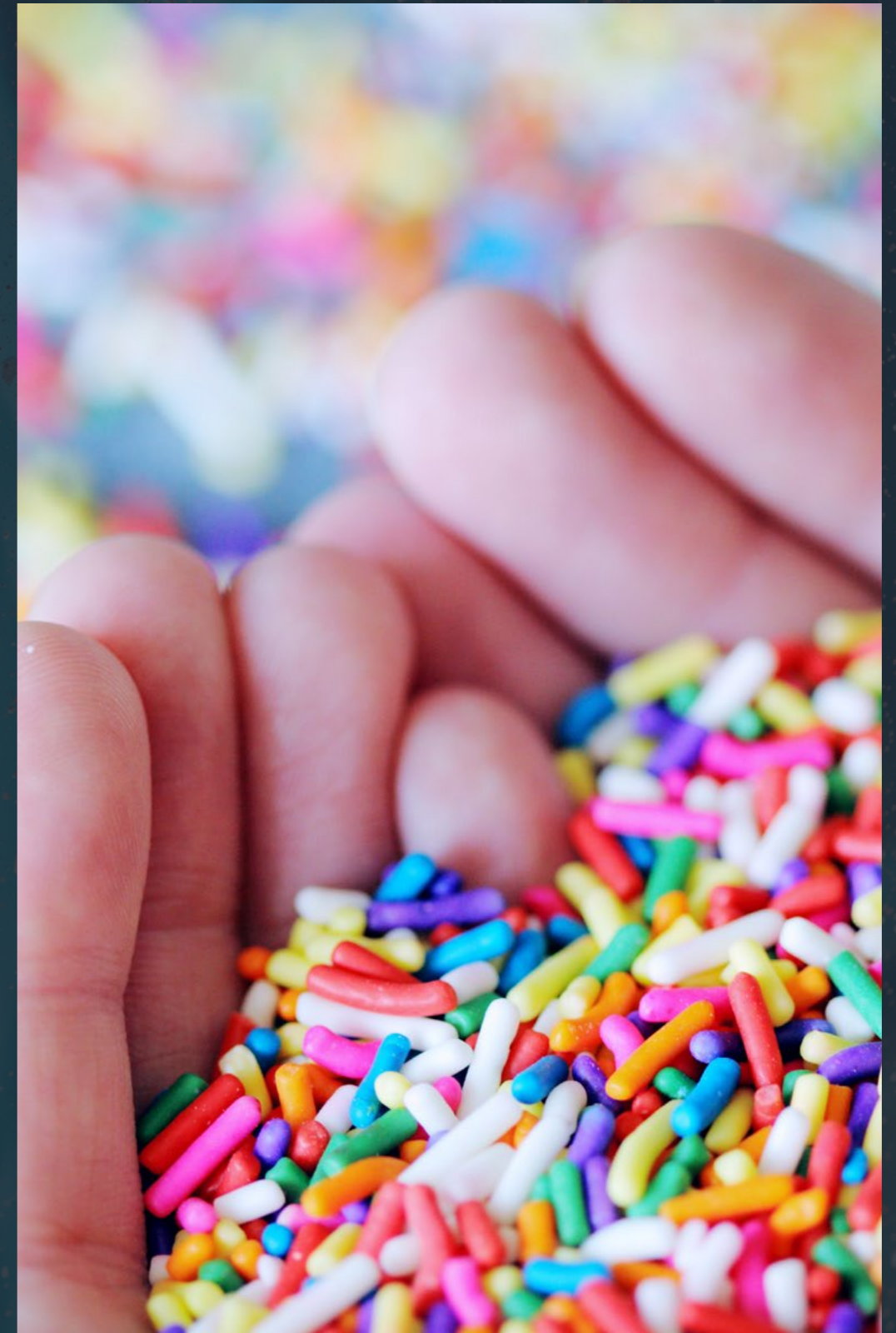
Insight 07 'Consequences & course correct'

“We spoke quite prominently about D&I issues but now the political landscape has shifted we have gone quiet, making us look weak and insincere”

- Leader of professional services business (large; US connected)

“It won't be long before employees start wondering: 'Is this really still important if it's no longer talked about..?'”

- Leader of management consulting firm (large; US connected)



Insight 07 'Consequences & course correct'

“I would be very careful about dialling back right now if you’ve been outspoken before. Brands who do will get punished for that. They will end up losing customers.”

- Thomas Kolster • Speaker & marketing activist

“There’s a risk that everybody’s personal cause becomes the company’s cause – and that’s a recipe for chaos. This reckoning is forcing businesses to consider what issues are really part of their strategy”

- Sarah Gillard • CEO, A Blueprint for Better Business
(former Head of Purpose, John Lewis)



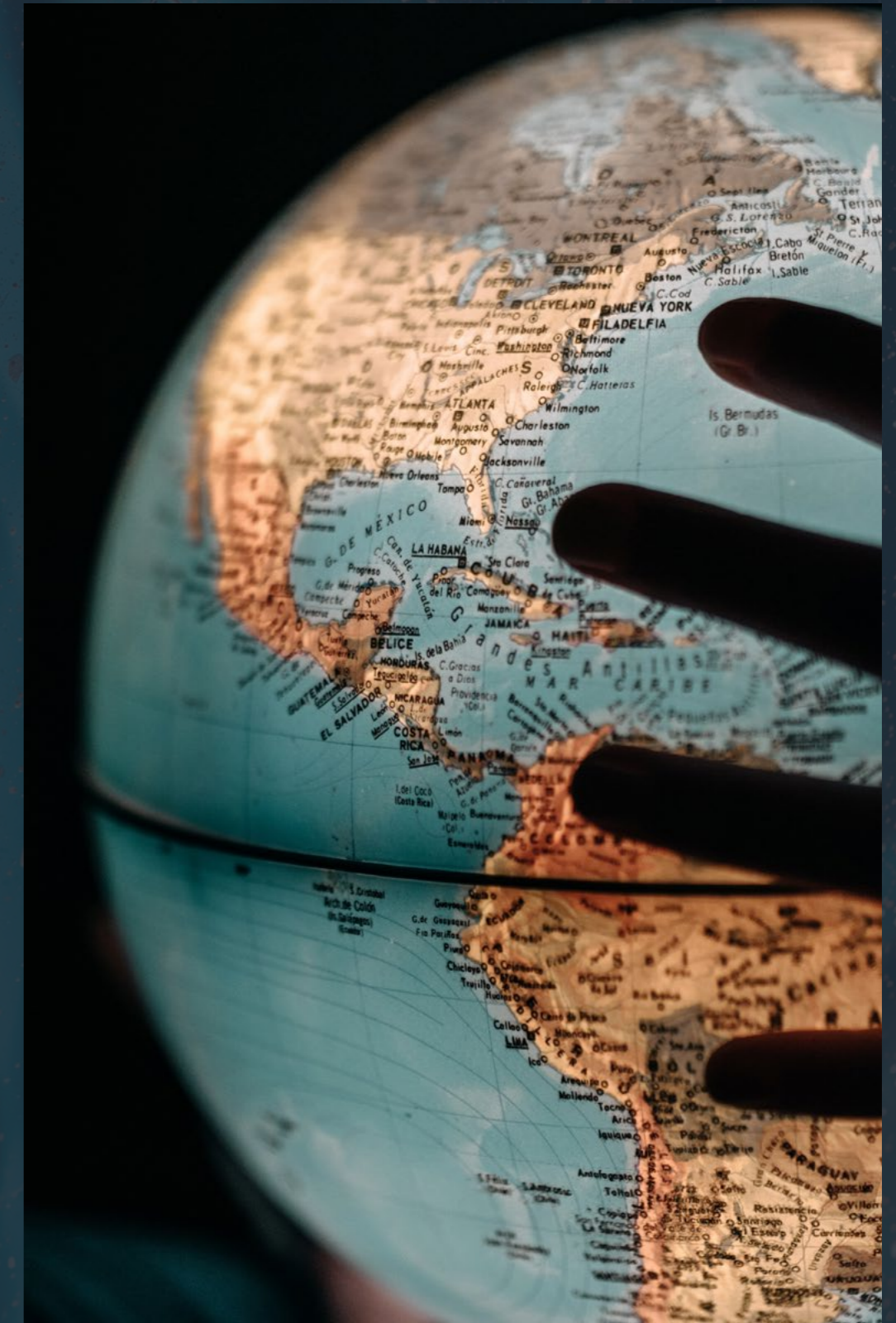
Insight 07 'Consequences & course correct'

“Businesses have retrenched into a slightly safer space, but ultimately a more credible space – and I don’t think that is necessarily a bad thing”

- *Chris Turner • CEO, B Lab/B Corp*

“Right now businesses are rationalising. They’re focusing on what they can do well, instead of trying to do everything.”

- *Anthony Impey • CEO, Be The Business*



Insight 08

Despite the pushback,
we aren't entering an
age of *'purpose hushing'*

Most leaders don't want their company to adopt a 'keep your head down and do the right thing' approach. They also don't believe their businesses will be quieter in the future.



Insight 08 *‘Shine the light’*

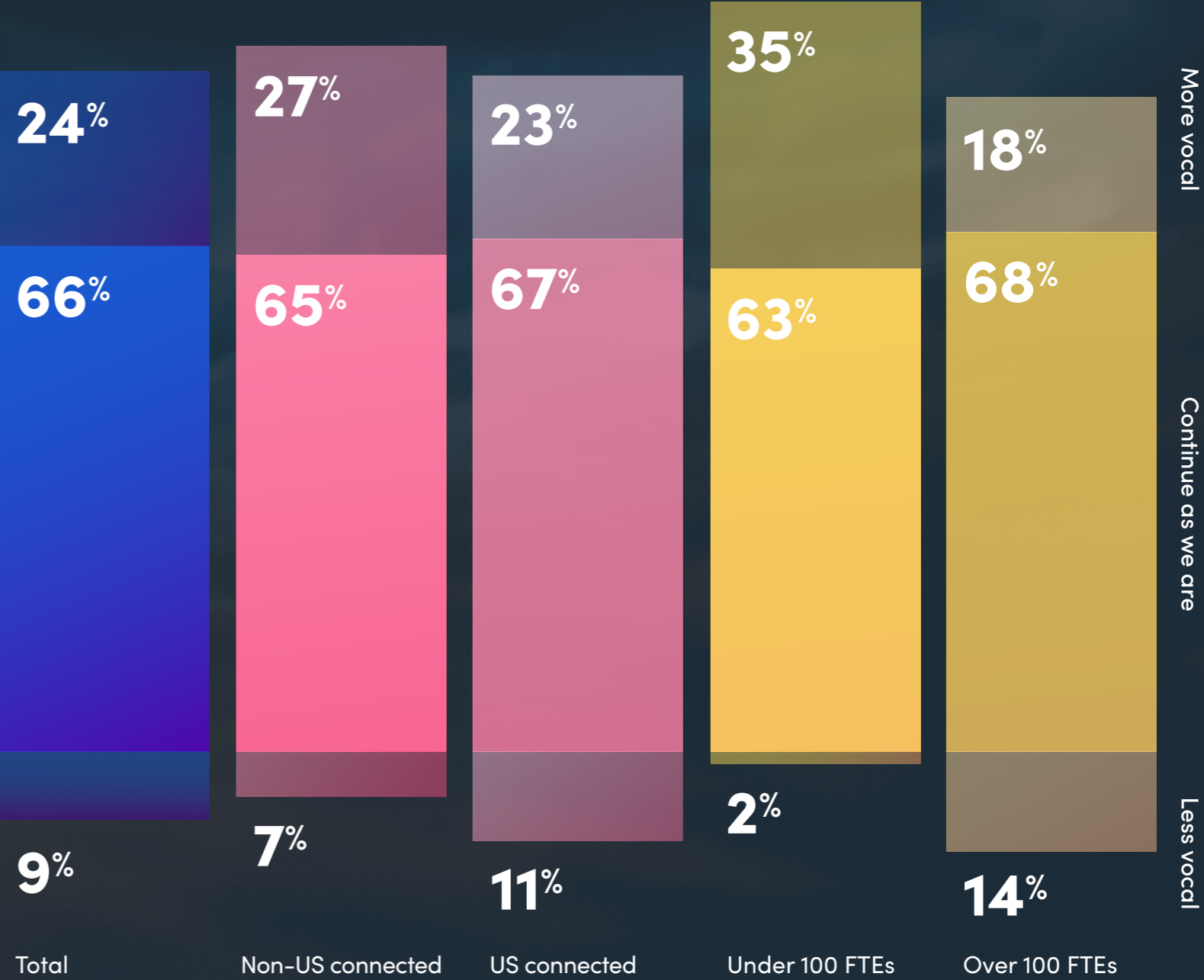
There are signs the pendulum may have stopped swinging. Across every audience group, 2 in 3 leaders expect their business to *‘continue as we are right now’* when it comes to being vocal around social & environmental issues. For the remaining third, the balance is tipped in favour of *‘more vocal’* (24%) over *‘less vocal’* (9%).

Even amongst large businesses, only 14% of leaders believe their company will be less vocal in the future.

This should provide some comfort for purpose advocates. It seems most leaders believe their business has reached ‘peak dial back’ – and won’t be dialling back any further.

Statistics

Will your company be more or less vocal on social & environmental issues moving forward?



Insight 08 *‘Shine the light’*

When asked what approach they would like their company to adopt, the majority (53%) answered *‘comply, care, and communicate’* – roughly in line with the proportion of businesses who have been vocal on issues in the past.

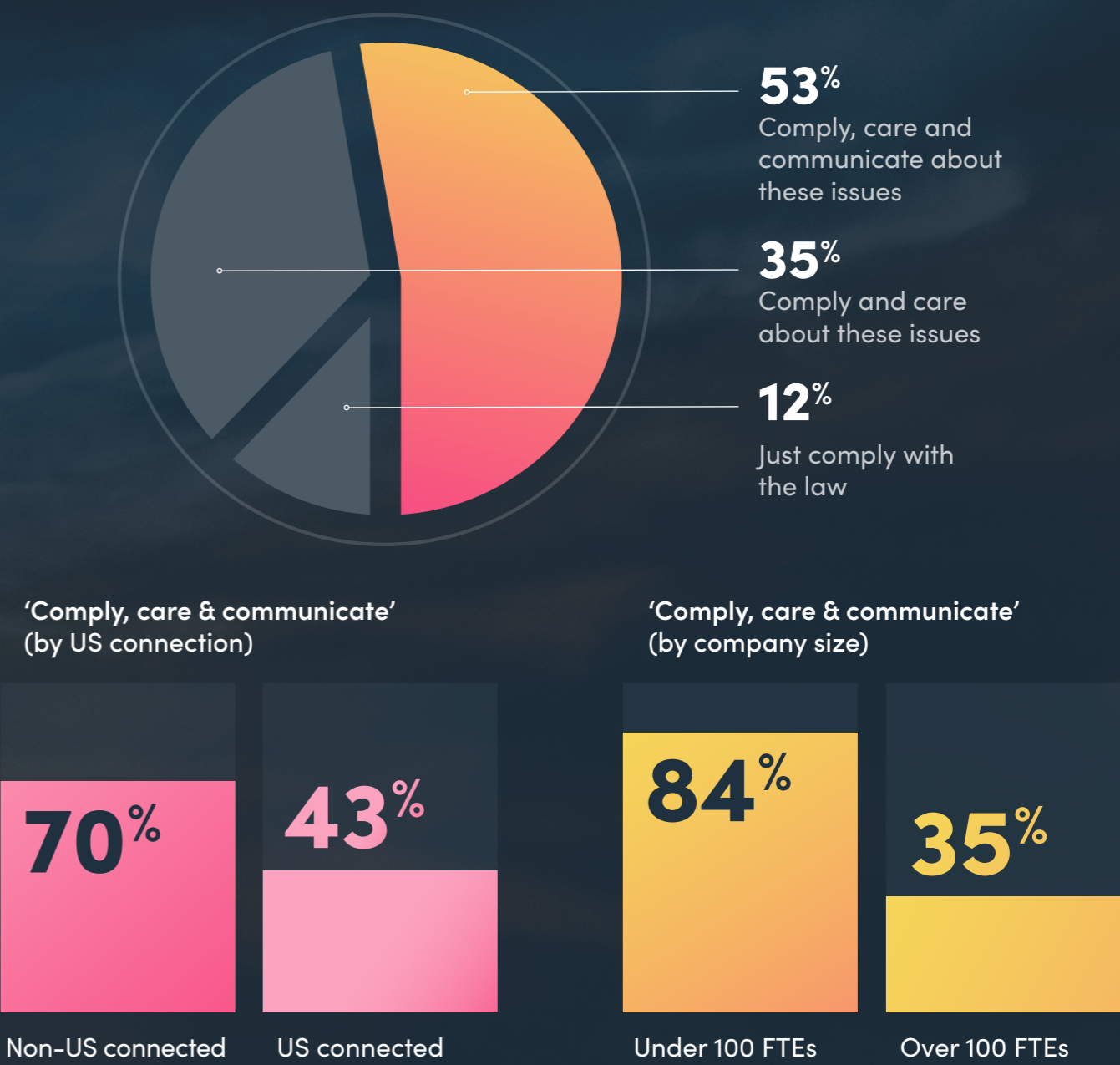
However, there are some stark variances in play. 84% of small business leaders take the *‘communicate’* view, compared with just 35% of large business leaders.

Similarly, leaders of businesses not connected to the US are considerably more aspirational (70%) than their US connected counterparts (43%).

It when comes to having the confidence to communicate, it’s clear that context really does matter.

Statistics

When it comes to social & environmental issues, what approach would you personally like your company to adopt?



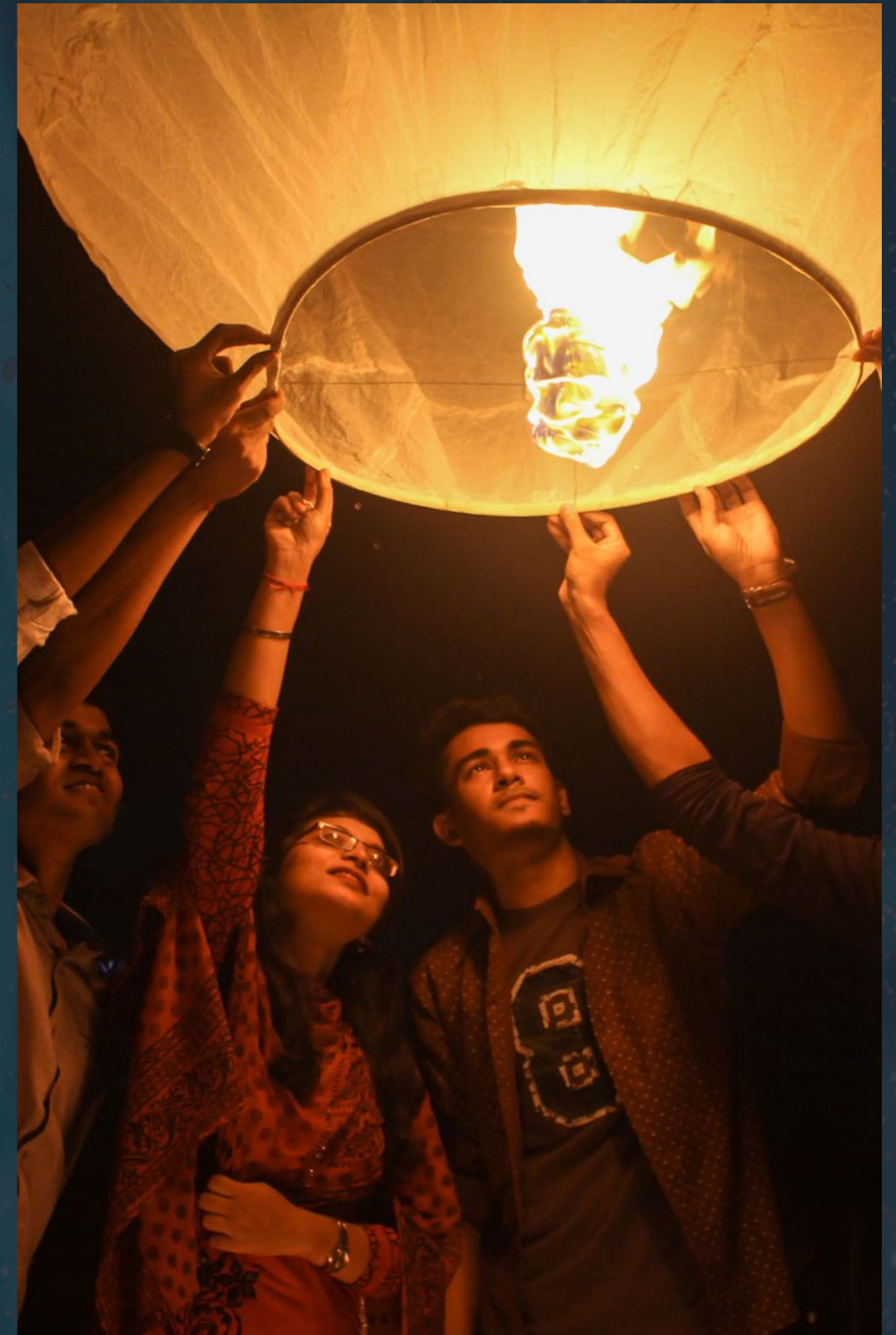
Insight 08 'Shine the light'

“Business leaders know these things are important.
It just feels like they aren't able to say that right now.”

- *Sarah Gillard • CEO, A Blueprint for Better Business
(former Head of Purpose, John Lewis)*

“For those who have focused on 'quick wins' to capture
market share or employee share, that can all be
reversed quite quickly. But I think even those businesses
will come back again when the climate changes.”

- *Chris Turner • CEO, B Lab/B Corp*



Insight 09

The 'purpose-led' label
is *now ubiquitous*. Has it
become meaningless?

From an outlier, the idea of 'purpose-led' business has gone mainstream – with 82% of leaders ascribing the label to their business. It raises some tricky questions...



Insight 09 'Purpose-led...?'

In our previous study (conducted at the height of the COVID pandemic in 2020), 77% of leaders regarded their business as 'purpose-led' – compared with 82% today.

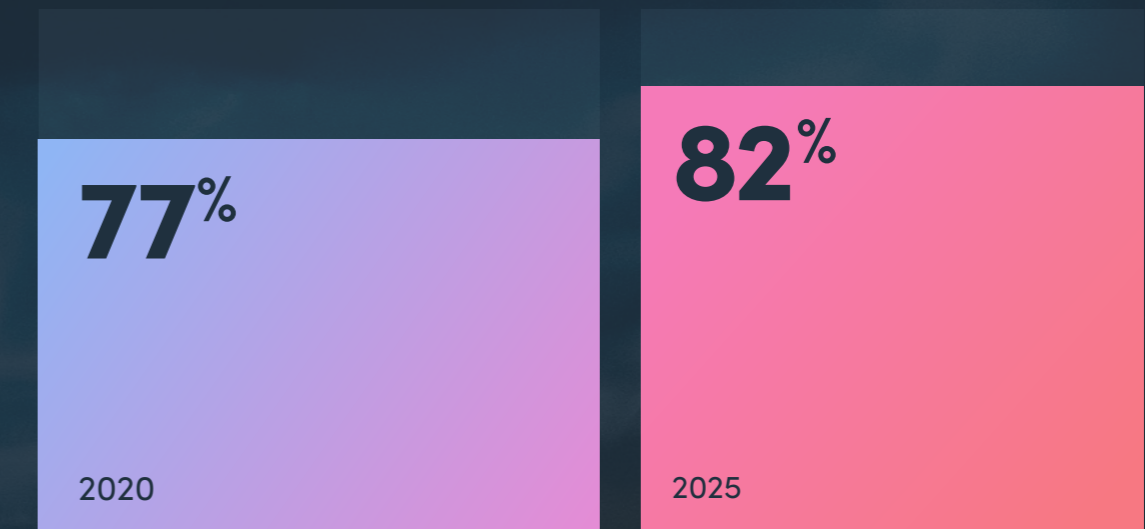
What's more, a high proportion of leaders (95%) now believe that purpose delivers a "competitive advantage" – a steep rise from 67% in 2020.

But those impressive numbers also raise some tricky questions:

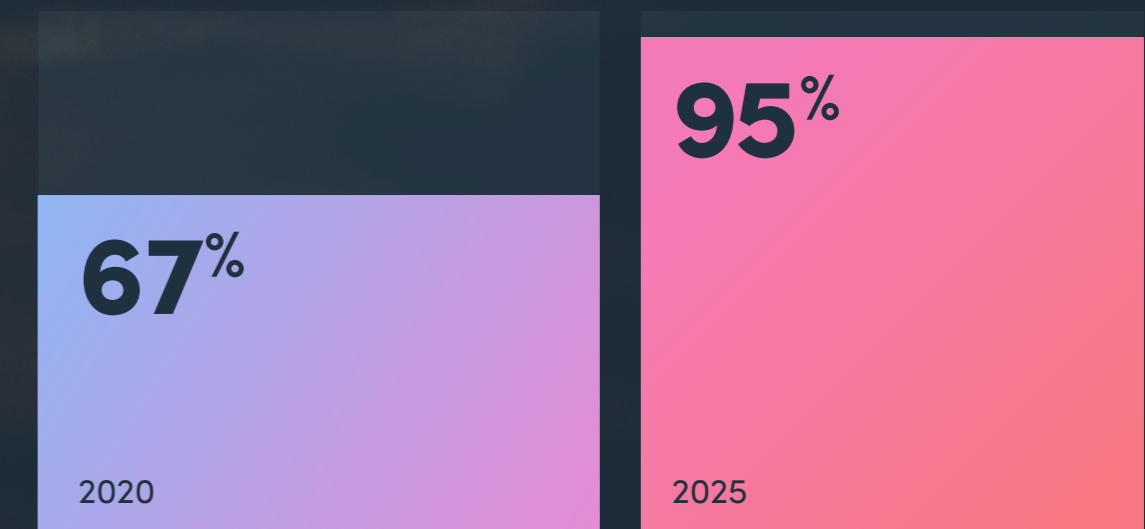
- Can *8 in 10* businesses really claim to be led by a "reason for being beyond making money" that has "a positive impact on the world?"
- How committed are these businesses to purpose, if *1 in 2* are now dialling back on social & environmental issues within their external comms?

Statistics

Would you regard your business as purpose led?



Do you believe your purpose gives the business a competitive advantage over other businesses?



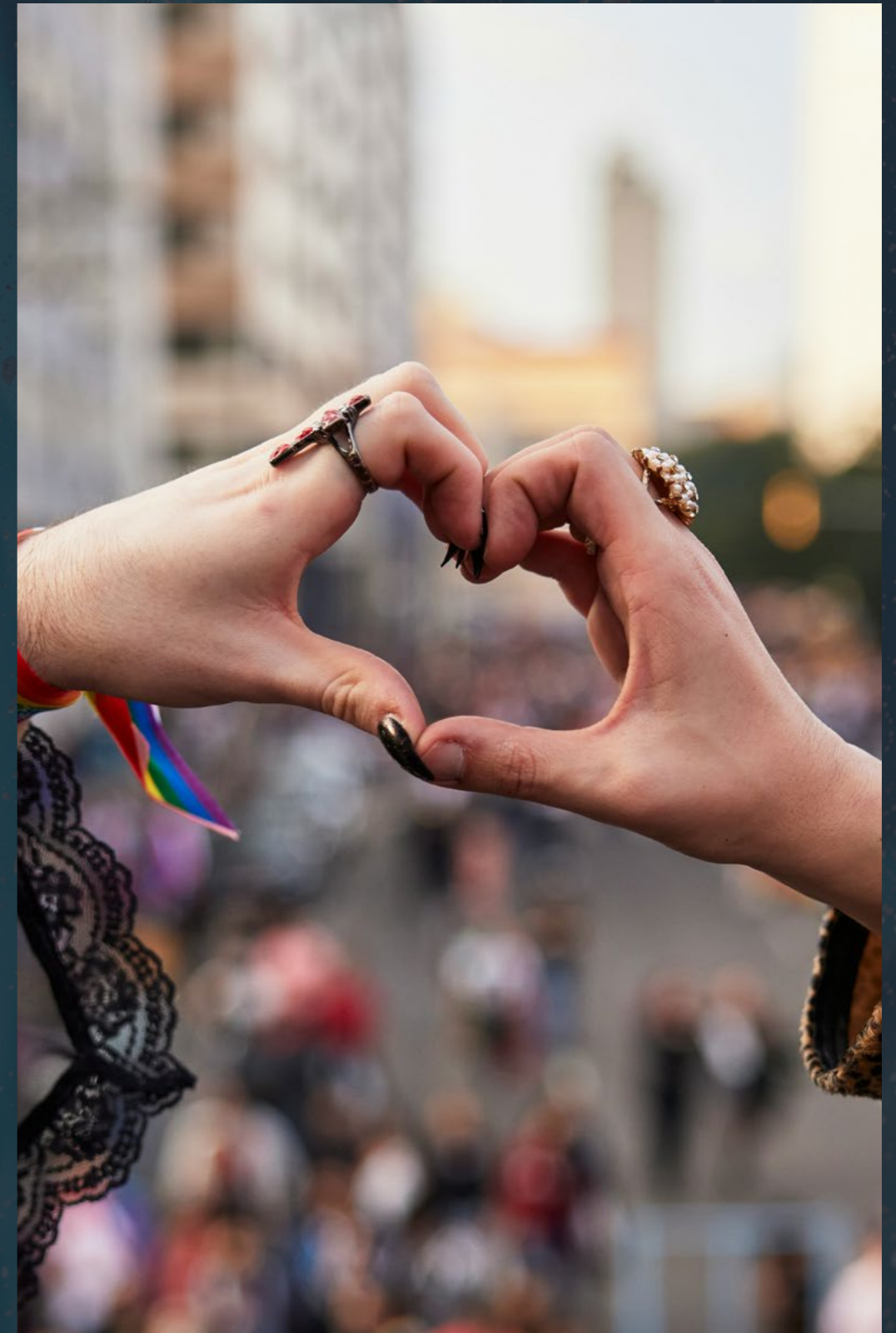
Insight 09 'Purpose-led...?'

“Our purpose runs throughout everything that we do. We spell it out during the interviewing and induction of new staff and all our company communications make reference to our purpose. The downside is that some staff ‘just want to do their job’ and find it all a bit too much.”

- Leader of environmental business (large; US connected)

“It is at the core of who many of us see we are and why we exist. It feels important to us, deeply so, and we use it as a filter for our most significant decisions.”

- Leader of consultancy (small; US connected)



Insight 09 'Purpose-led...?'

“We talk about purpose as the right thing to do, but at its core it’s just good business”

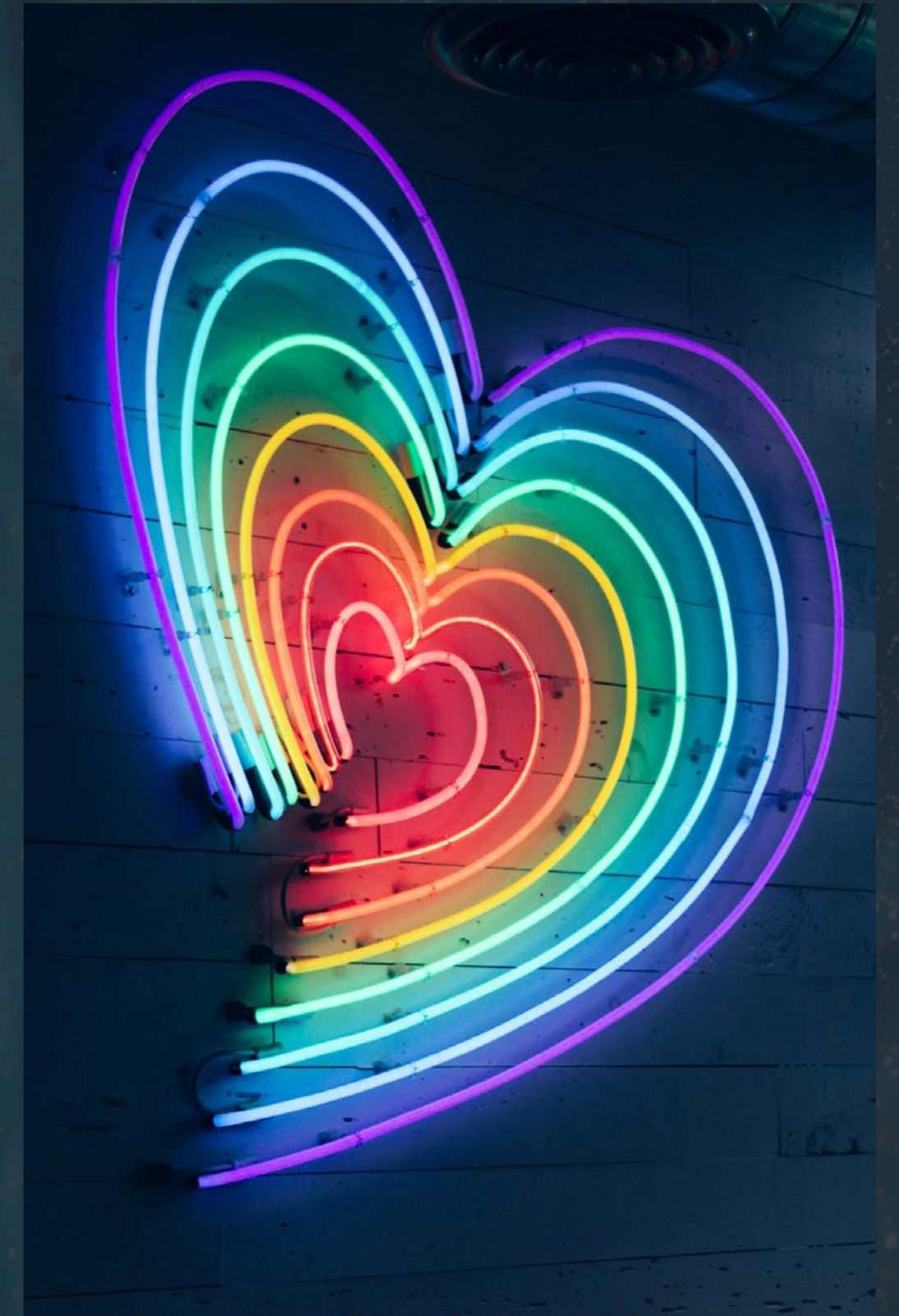
- *Anthony Impey • CEO, Be The Business*

“We love to talk about purpose – we don’t love to live it or embed it into business practice”

- *Leader of law firm (large; not US connected)*

“Purpose that isn’t aligned with your strategy and business model is just a cute tagline”

- *Timothy Henry • CEO, Conscious Capitalism*



Insight 10

Moving forward, purpose will
be *less divisive*, disconnected
and performative

While purpose is clearly here to stay, leaders recognise there are lessons to be learnt. These lessons are shaping what purpose will look and sound like moving forward.



Insight 10 *‘Lessons for the future’*

When asked to identify ways the company had gone “too far” around purpose in the past, leaders are clear – it had become:

- Too divisive
- Too disconnected
- Too performative

Those same themes were repeated throughout our 1:1 interviews and verbatim comments from survey responses.

Interestingly, concerns around ‘purpose-washing’ and inauthenticity featured less prominently in both the survey and interviews – despite being in the headlines in recent years.

Perhaps leaders have moved past asking themselves “is this true?” and are now asking “is this helpful?”

Statistics

In what ways has the company gone too far with purpose?



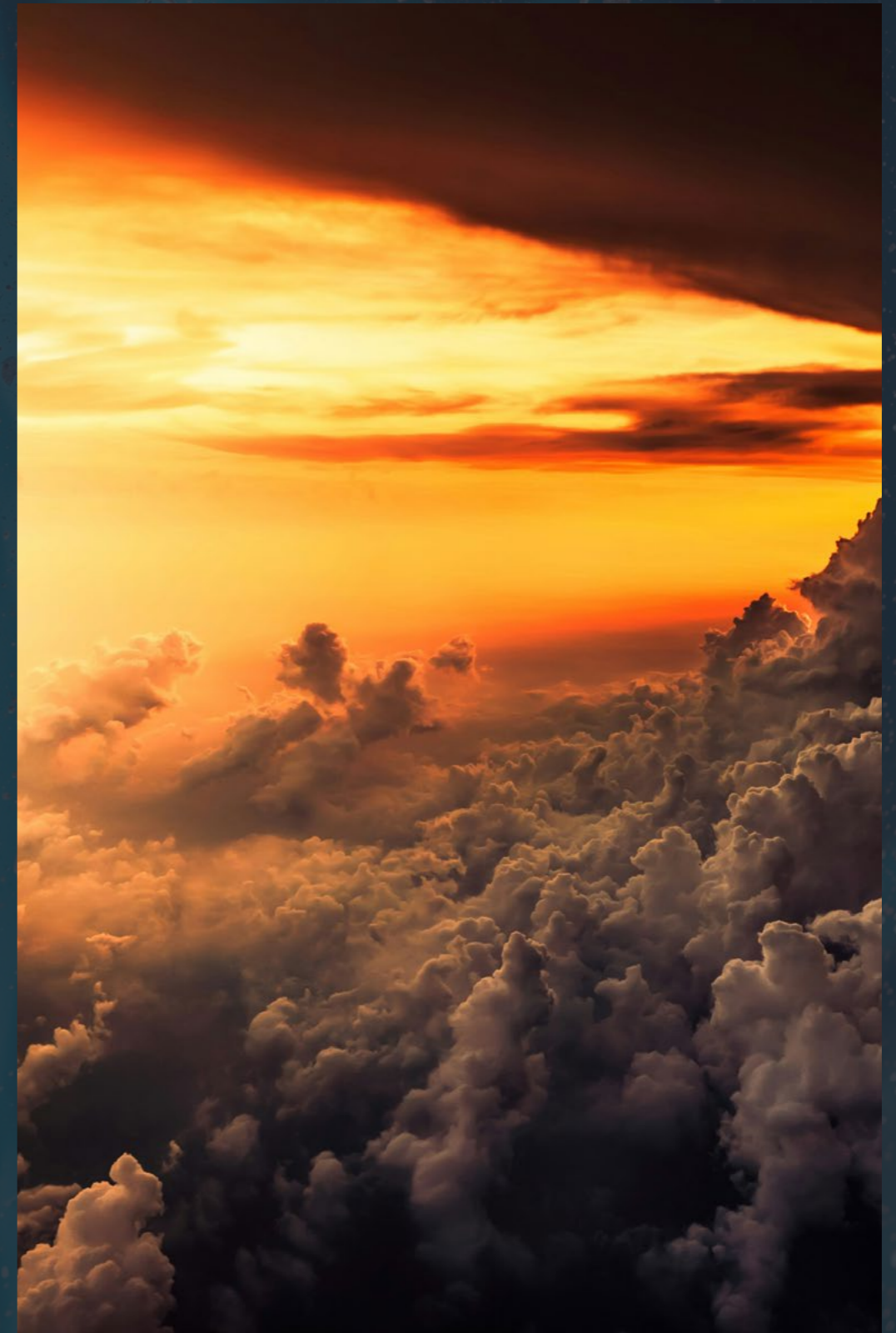
Insight 10 'Lessons for the future'

“We deliberately take a positive or neutral stance on purpose issues because we don’t believe shouting and shaming helps take forward the progressive agenda. In fact much damage has been done by angry ‘champions’ in this space.

- Leader of consulting business (small; not US connected)

“We make a lot of noise about diversity and inclusion in leadership, but the leadership continues to remain mostly male, white and privately educated.”

- Leader of accounting/banking business (large; not US connected)



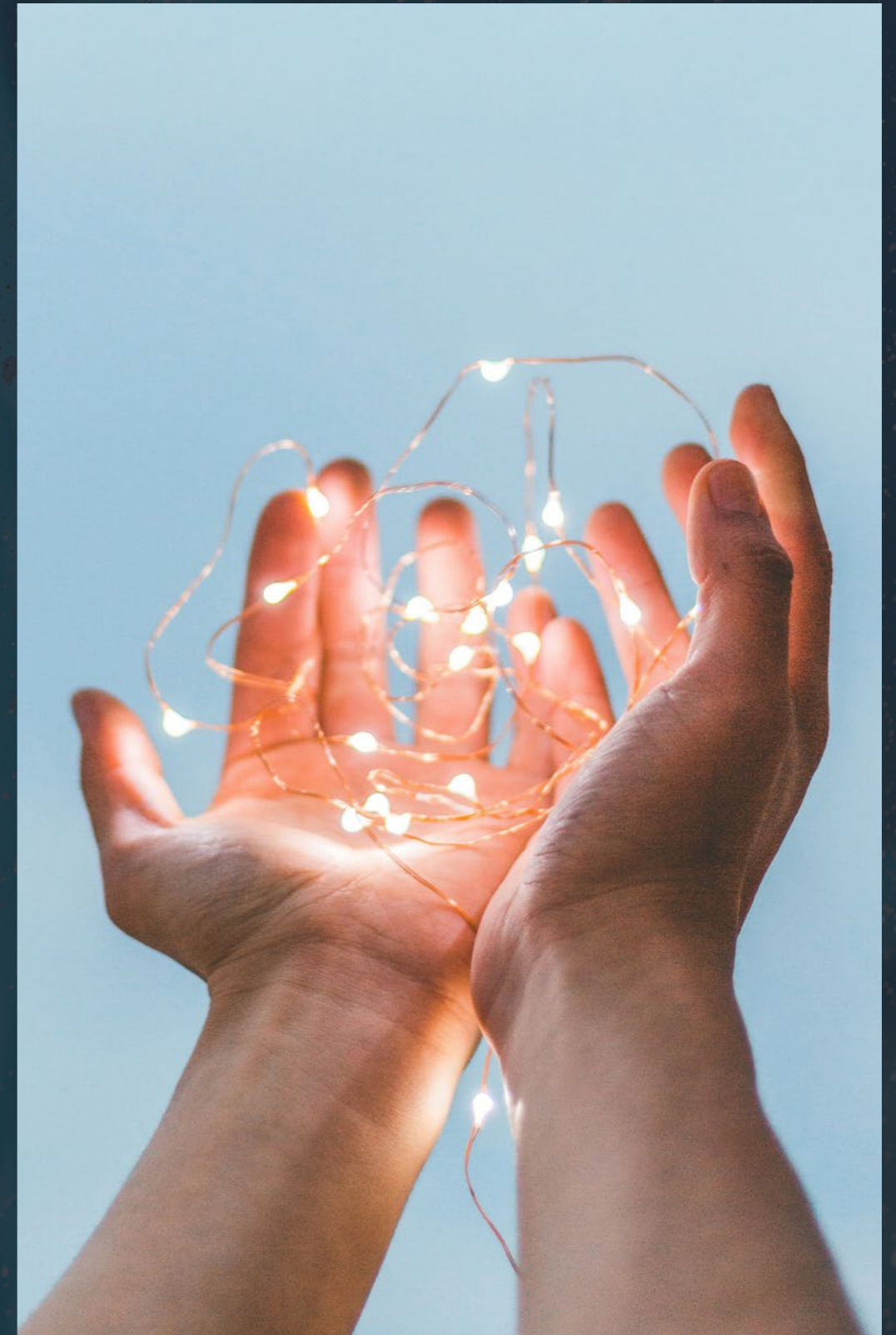
Insight 10 *'Lessons for the future'*

“Fighting hard has actually had a counter effect. It hasn't made people feel included, it hasn't brought them along. And that's a problem...”

- *Thomas Kolster • Speaker & marketing activist*

“Moving forward, I would expect more focus around specifics – answering ‘what does this actually mean?’ There'll be a concerted effort by businesses to tie together what they are saying with what they are actually doing.

- *Chris Turner • CEO, B Lab/B Corp*



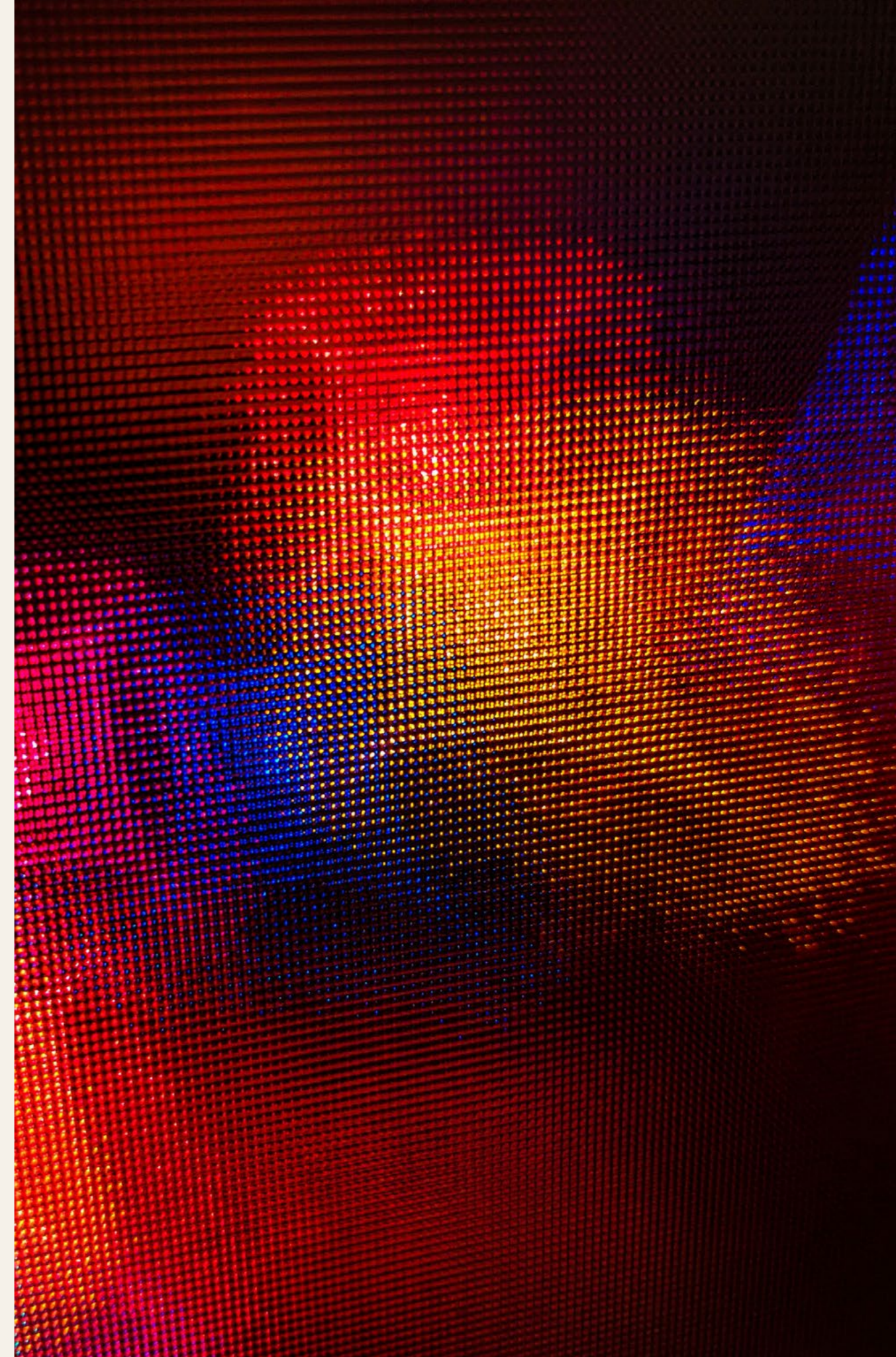
The Marketer's Appendix

The state of purpose from a marketing perspective

Marketing Insight 01

When it comes to
speaking out, both B2C
and B2B have been
turning up the volume

It's easy to assume B2C brands are the ones that make the most noise around purpose, while their B2B cousins sit quietly in the corner. In the past, perhaps – but not anymore.



Marketing insight 01 ‘Noisy cousins’

It seems that B2B has found its voice when it comes to social impact and sustainability.

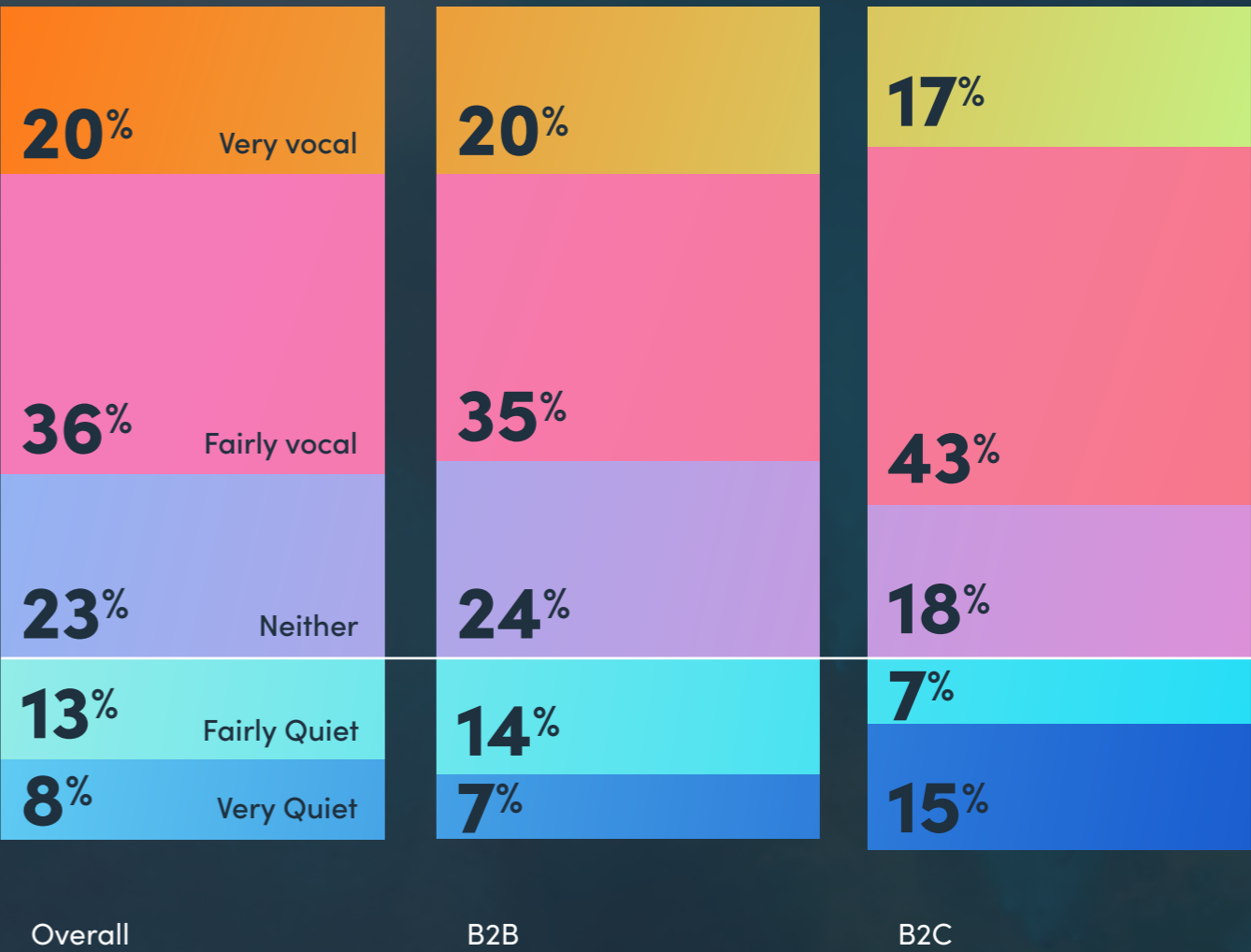
Surprisingly, B2B leaders are more likely to claim their company has been “very vocal” in recent years (20%) compared with their B2C counterparts (17%).

Even more surprising, B2C leaders are 2 x more likely to claim their company has been “very quiet” around social & environmental issues in the past.

While the overall average still leans slightly in favour of B2C brands, it’s clear that B2B brands are no longer content to be quiet.

Statistics

How vocal has your company been around social & environmental issues in the past?





Thomas Kolster
*Author, speaker and
marketing activist*

Less zig-zagging, *more action*

“You can’t undo things like renewable energy and DEI. They aren’t going anywhere. What’s more, the business case is there – from the likes of P&G to smaller challenger brands. There’s honestly no reason for zig-zagging.

What’s more, you don’t build a brand by going quiet on these issues. That’s just not going to work. Those of us in marketing and advertising need to remind our clients of that. We need to advise them not to head for the exit.

As an industry, we haven’t been good enough at telling a compelling, inclusive story around issues like climate change. Why bully people who don’t understand the diversity agenda? Some of this polarisation is a failure on our part.

We’ve created hero brands that were too good to be true. Now is the time when businesses need to really deliver.”

Marketing Insight 02

B2C brands are trying
to stay the course,
while *B2B brands duck
for cover*

B2B and B2C brands have been equally vocal in recent years.
The difference now? One group is staying the course, while the
other ducks for cover.



Marketing insight 02 *'Staying the course'*

Despite having been similarly vocal around social and environmental issues in the past, B2B and B2C brands divide sharply in their response to the current climate.

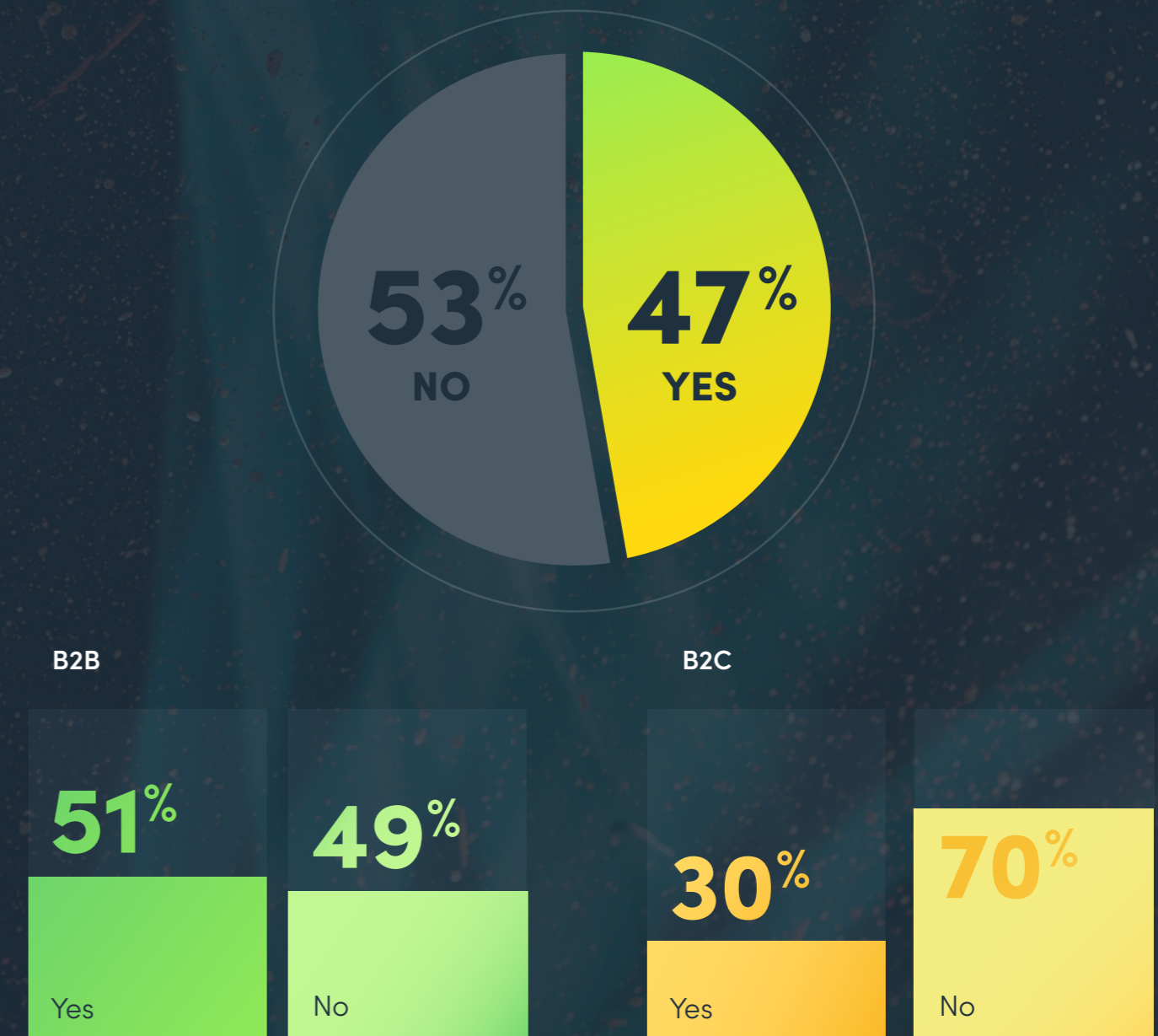
B2C brands are bucking the dial back trend, with only 30% doing so. By contrast, *1 in 2* B2B brands are in retreat around social and environmental issues.

This corresponds with a heightened concern by B2B leaders that the business may have gone too far in speaking out in the past – with 39% believing this to be the case (vs just 24% of B2C leaders).

It all points to the reality that B2B leaders are unsure whether to stay the course as the seas become choppy.

Statistics

More recently, has your company dialled back on social & environmental issues within its external comms?



Marketing Insight 03

B2B leaders are
betting on purpose to
help them *stand out
in the future*

The current climate hasn't dampened belief in purpose as a winning strategy for brand differentiation. The biggest surprise? B2B leaders are placing the biggest bet.



Marketing insight 03 *'The B2B future'*

If our research is anything to go by, B2B looks set to become the natural home of purpose.

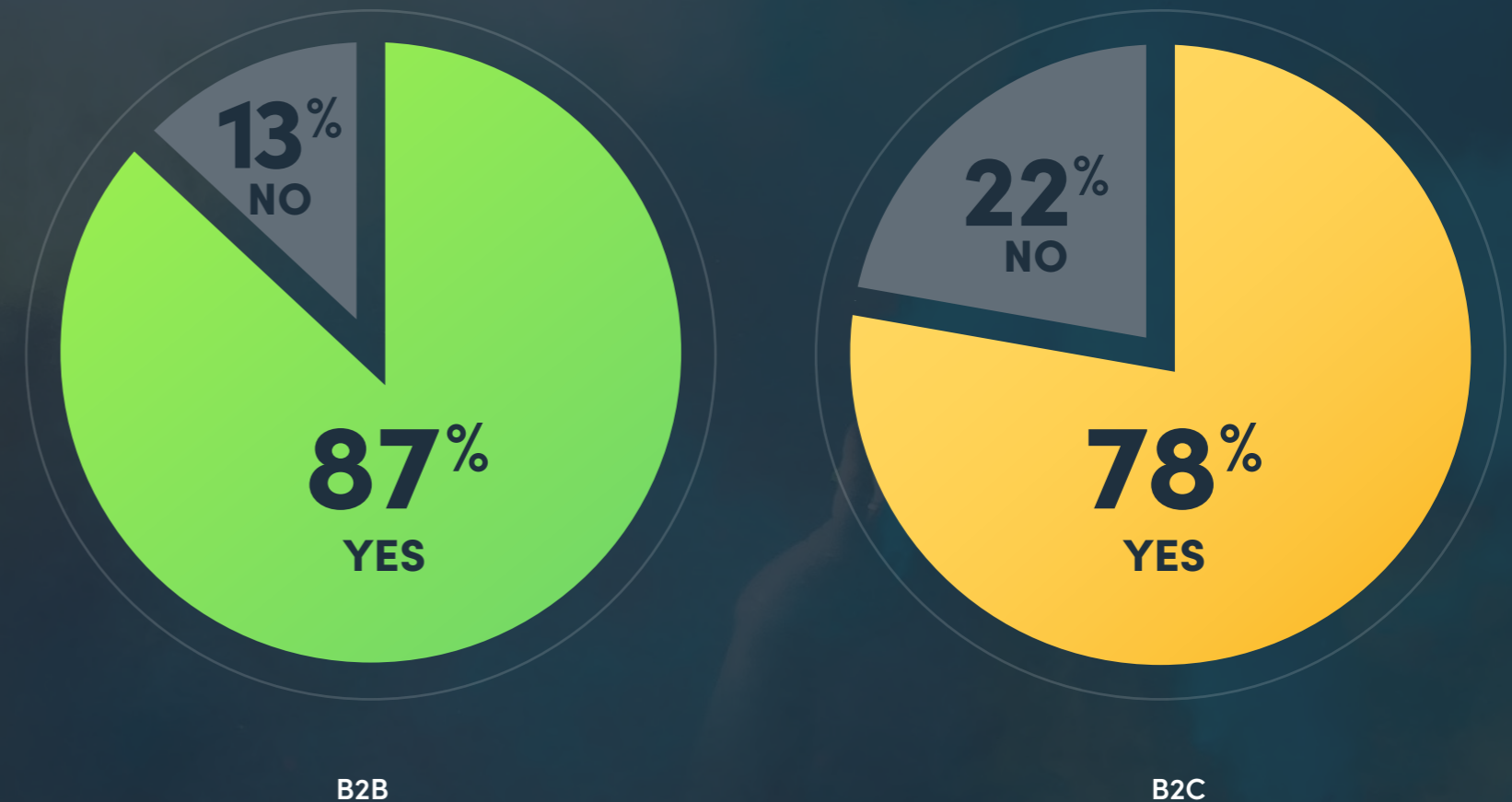
When asked to gaze into their crystal ball, it was B2B leaders who felt most confident that purpose would be a differentiator for their brand moving forward – a view shared by 87% (vs 78% of B2C leaders).

That stat – along with comments from the in-house marketing leaders we interviewed – suggests this could be a 'changing of the guard moment' when it comes to B2B brands embracing purpose.

B2C brands have been winning by tapping into purpose for years. It looks like their B2B counterparts are ready to have their turn.

Statistics

Looking ahead, do you think 'purpose' will be a differentiator for your brand?



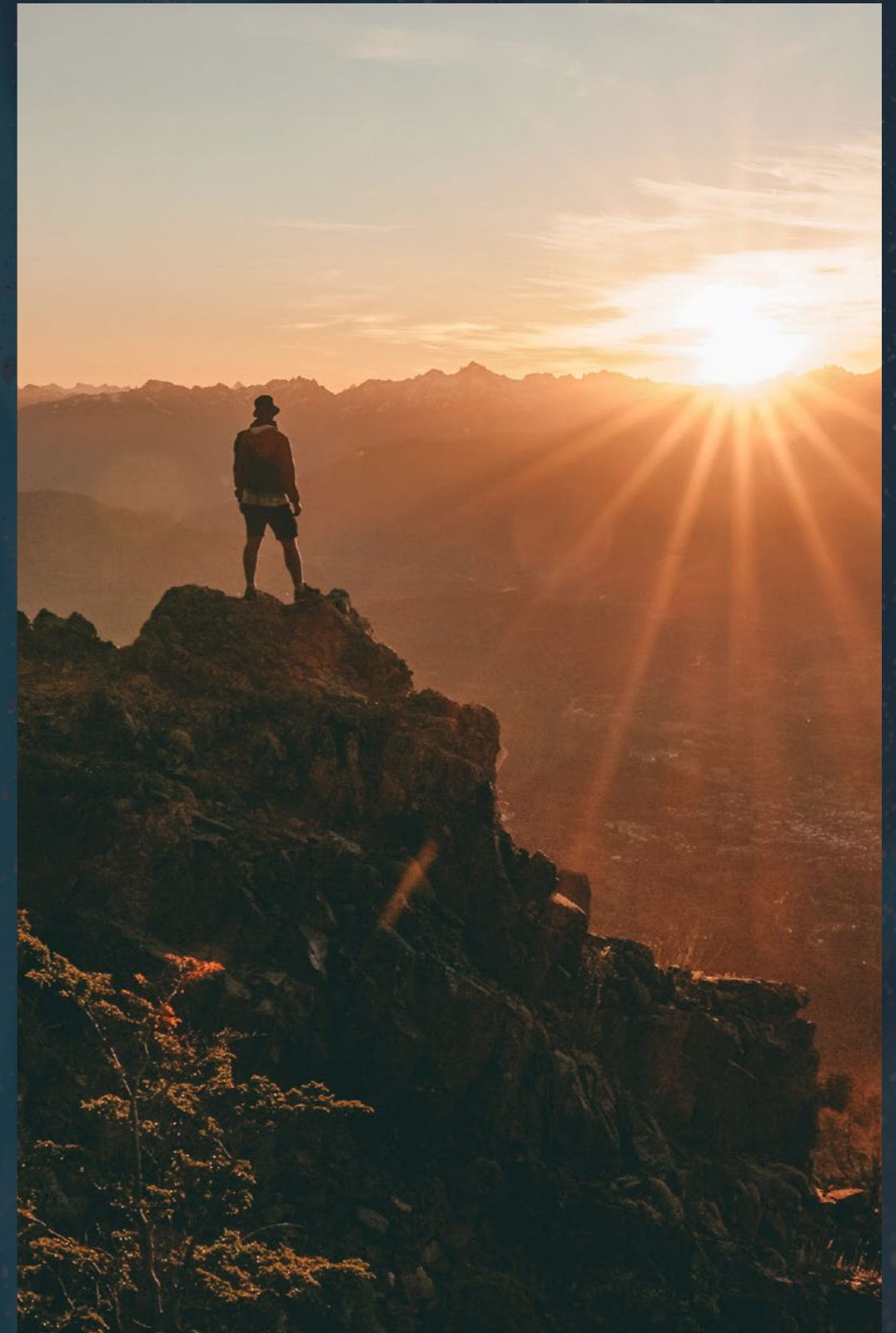
Marketing insight 03 'The B2B future'

“Many B2B brands have been ‘purpose hushing’. But B2B holds the biggest potential right now as the challenges become more apparent. There is lots of potential to activate...”

- *Thomas Kolster • Speaker & marketing activist*

“Purpose is much more correlated to effectiveness in B2B advertising than it is in B2C. When it comes to employee and customer engagement...purpose actually plays a much bigger role in B2B.”

- *Jon Evans • Author & host of The Uncensored CMO podcast
(Speaking on episode 117 - January 17, 2024)*



Marketing Insight 04

The big problem? Purpose can't be a differentiator for everyone

From cause-led messaging to feel good ad campaigns, brands of all shapes and sizes have tapped into the power of purpose in recent years. But purpose can't be a differentiator for every brand.



Marketing insight 04 'Purpose crowding'

Nearly 9 in 10 leaders claim that 'purpose' will be a differentiator for their brand moving forward.

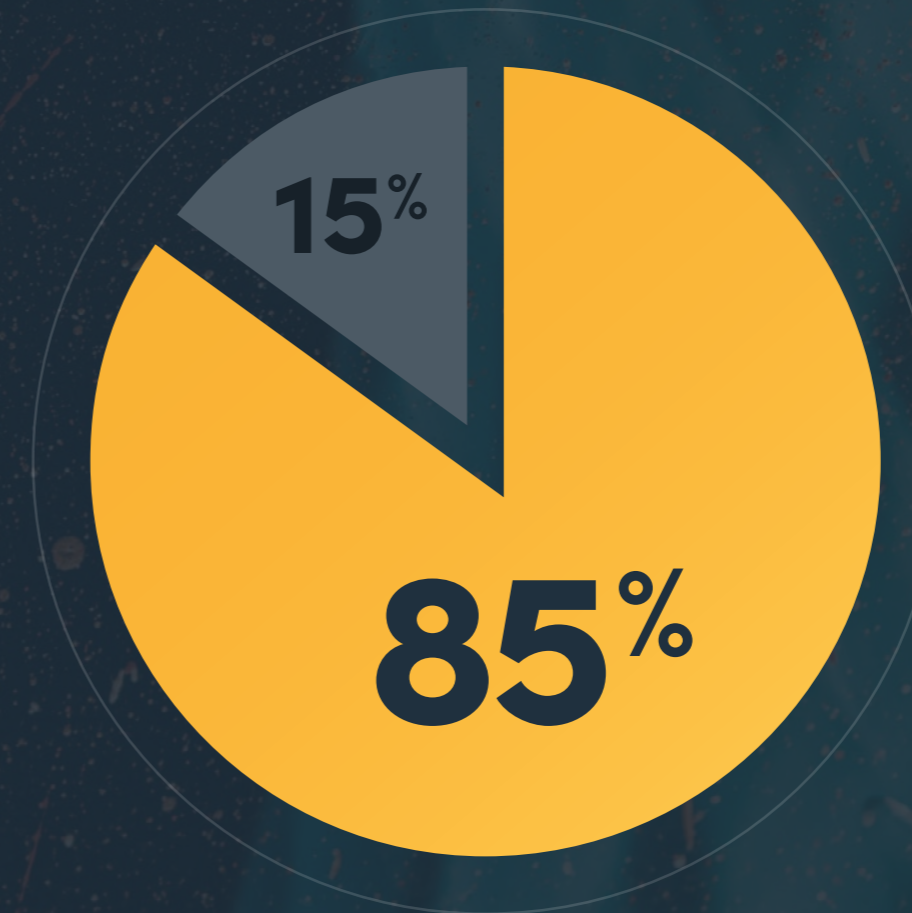
But 9 in 10 brands can't win by adopting the same positioning. And leaders who force their brands to squeeze into the purpose 'glass slipper' risk slipping into overreach, division and disconnect – the very reasons we are having this moment of reckoning.

For marketers, purpose also comes with another risk: *overcrowding*. From our conversations, many pro-purpose leaders in purpose-heavy categories are asking themselves: "*Is leading with purpose the right strategy for our brand?*"

When 85% believe they can differentiate around the same thing, it is the right question to ask.

Statistics

Looking ahead, do you think 'purpose' will be a differentiator for your brand?



31%
Yes, definitely

54%
Yes, possibly

12%
No, don't think so

3%
No, definitely not

said & done

What kind of *impact brand* are you building?

89% of marketers believe purpose can differentiate their brand

But what flavour of purpose is right for your brand?

Which messages will resonate with your audience?

How can you authentically grow your brand?

This is where our **impact brand wheel** comes in.

It offers clarity amidst the confusion - helping marketing leaders choose the right path for their brand.

To get started, contact us at hello@saidanddone.co.uk



With heartfelt thanks to all of our partners and contributors for making this research possible

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