the FUTURE of BRITAIN

FIVE YEARS ON

OMD

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FIVE YEARS ON – THE FUTURE OF BRITAIN

I am delighted to be able to introduce you to the Future of Britain - Five Years On whitepaper. The Future of Britain is OMD UK's proprietary research initiative and this particular edition marks the fifth anniversary of our study.

Back in 2013 we launched The Future of Britain programme in response to the seismic cultural and societal shifts taking place across Britain. We wanted to get under the skin of real Brits, find out more about them, their attitudes and opinions; and we've done just that with studies into *The Future of Parenting*, *The Future of Christmas*, *Now and Next, Entrepreneurial Britain*, *The Future of Generations* and many more, speaking to over 15,000 people along the way. This year, we thought it poignant to go back to where we started, with The Future of Britain, and reflect upon the changes that have taken place and how our attitudes and opinions have evolved.

The insights that we have uncovered and the evolution of our attitudes and opinions from 2013 are truly fascinating. Be they concerned with our continued tussle with technology, a shift in our traditional life stages or how Britain is currently in a state of 'contented resilience', they make for enthralling reading.

However, working out how brands can react to these findings is what gets us really excited, and we look forward to discussing our results and the implications with you going forward.

Dan Clays, CEO, OMD UK

THE RESEARCH

In a bid to understand how life has changed over the past five years we carried out an extensive, multi-stage research project. The research was carried out between April and June 2018 and involved:

1. An online survey with a representative sample of 2,000 adults in the UK. Quotas were placed on age, gender, social grade and region to ensure the sample was representative of the population
2. Qualitative interviews with 10 of our YourVoice online community members
3. On-street Vox Pops
4. Social listening, using Netbase.

BRITAIN IN 2013 AND 2018

WHEN THE FUTURE OF BRITAIN WAS FIRST CONCEIVED IN 2013, THE COUNTRY WAS IN A UNIQUE SITUATION NOT SEEN IN LIVING MEMORY. A FEELING OF EUPHORIA FOLLOWING THE OLYMPICS AND THE DIAMOND JUBILEE WAS JUXTAPOSED AGAINST OUR EMERGENCE FROM THE WORST RECESSION THE COUNTRY HAD SEEN FOR A CENTURY.

Although we had a sense of pride at what the country had achieved, people were also feeling the impact of austerity measures, which were evident all around them – from levels of unemployment through to the loss of many high street brands.

However, a lot has happened between 2013 and today, both on a local and global scale: the UK voted to leave the EU; Andy Murray became the first Brit to win Wimbledon in 77 years; we voted in favour of same-sex marriage and we have an increased terrorism threat. The Britain we know today is almost unrecognisable from the one that we saw emerging from the shadows of the recession in 2013.

Britain today has a new leader and a new economic outlook. Although we've had a Conservative Government since 2010, we saw a change in leadership in 2016 from David Cameron to Theresa May, and alongside this, we've seen the economy continue a slow move into growth, with GDP now being 11% bigger than it was before the recession.

We had a decrease in unemployment compared to 2013, but interest rates are still low and concern is growing for the long-term health of the economy. We're seeing an increasingly squeezed health and welfare system, as the population ages and funding remains cut. And although the pace of technological development isn't as fast as it was in the decade before, we're still seeing changes in the likes of voice technology and more transparent data regulations. But what impact does all of this have on how real people live their lives?

Our research has identified five key trends that illustrate how the country has changed over the past five years and that have significant implications for brands and media.

FROM 2013	TO 2018
CRUNCHED CONSUMERS	WIDER WORRIES
THE UNKNOWN	CONTENTED RESILIENCE
LIFE EVENTS LESS PREDICTABLE	LIFE EVENTS STILL UNPREDICTABLE
PRIDE IN THE UK	DIVIDED UK
OVERWHELMED BY MEDIA	SMART CURATORS

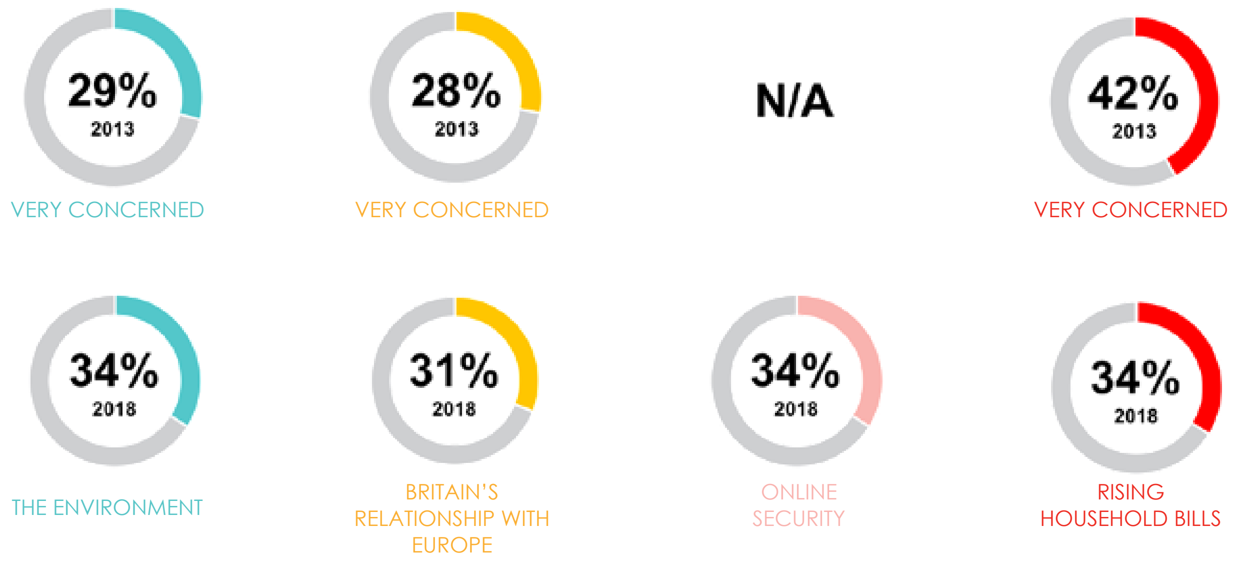
1

FROM CRUNCHED CONSUMERS TO WIDER WORRIES

Financial concerns dominated our worries in 2013. Although the shadow of the recession receded, the impact of austerity was really starting to affect our everyday lives. During our 2013 The Future of Britain research, we saw that we had the same, or less, money coming in but the cost of living was rising, with increased utility, rent and grocery bills. The entire country was feeling squeezed.

But in 2018, we've seen a change. There has been a dramatic decrease in the proportion of people that say they're very concerned about the state of the economy; from 58% in 2013 to 29% in 2018.

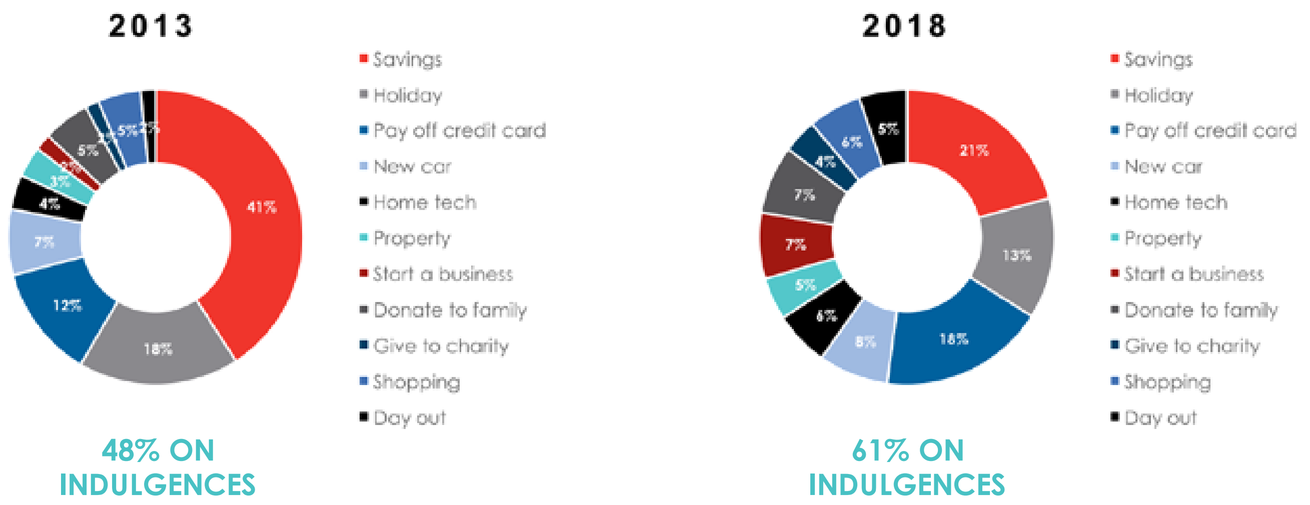
"THE PROPORTION OF THE UK THAT ARE VERY CONCERNED ABOUT THE STATE OF THE ECONOMY HAS HALVED OVER THE PAST FIVE YEARS, FROM 58% IN 2013 TO 29% IN 2018"



Source: OMD UK, Future of Britain, 2013, 2018. How concerned are you with....? Base: 2013: 2024, 2018: 2000

We found that other worries have started to emerge, as our concerns about the economy abate slightly. For example, there has been an increase in the proportion of us that are worried about the environment, from 29% in 2013 to 34% in 2018, and Britain's relationship with Europe, from 28% in 2013 to 31% in 2018. Alongside these increases, we also saw a drop of 8% that were very concerned about 'rising household bills'. Our over-riding concern about money and the economy has settled a little in the past five years, allowing other wider worries to surface.

IF YOU RECEIVED A BONUS, WHAT WOULD YOU SPEND IT ON?



Source: OMD UK, Future of Britain, 2013, 2018. 2013: If you received a bonus, what would you spend it on?
Base: 2024, 2018: If you were given £1,000, what would you spend it on? Base: 2000

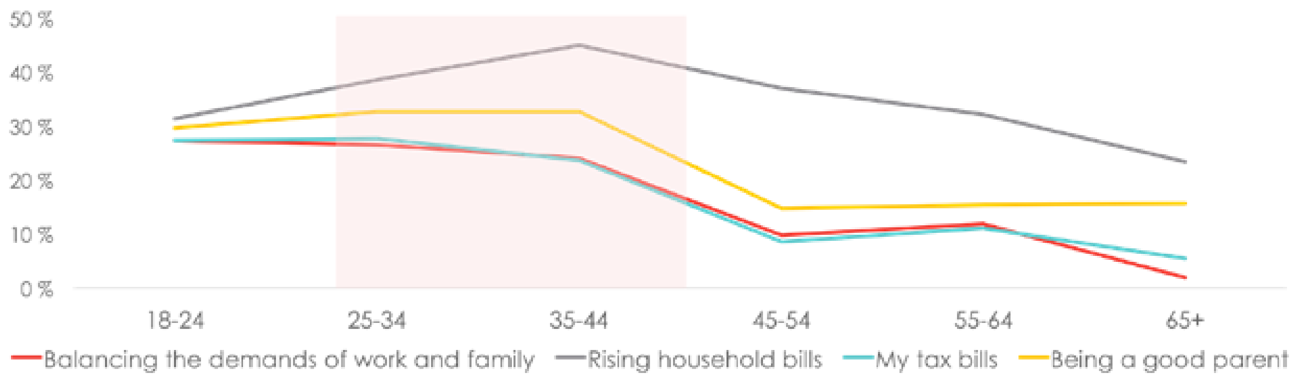
This reduced concern about our finances is also evident in how we would spend any spare money. When we asked people in 2013 what they would spend a £1000 bonus on, over 40% said that they would put it into savings. However, in 2018 this proportion has halved to 21%. This is most likely due to a combination of less worry about money combined with low-interest rates. We are now more likely to spend a bonus on indulgences and altruism such as shopping, going on days out, donating to charity or starting a business.

So, are we all worried about the same things? Unsurprisingly not.

We found that our youngest age group - those aged 18-24 - are, contrary to popular belief, the group most likely to be worried about social issues. Often dubbed 'snowflakes' and criticised for being narcissistic, we found that this age group were in fact the most likely to declare that they're very concerned with the environment, gender equality, societal racism, fake news and world poverty.

However, as we move into middle age we see the issues we are very concerned about becoming more insular. The things that those aged between 25-44 are worried about become more focused on our immediate surroundings; such as balancing the demands of work and family, rising household bills, tax bills and being a good parent.

HOW CONCERNED ARE YOU WITH...
(VERY CONCERNED)



Source: OMD UK, Future of Britain, 2018. How concerned are you with....? Base: 2000

This isn't surprising when we think about all the seminal life events that happen during this time. During our late 20s to early 40s, when our worries become more personal, we're most likely to get married, have children and buy a house. Alongside all these events, we become more narrow-minded with more in our immediate sphere to worry about. When we have others to look after, we put them first. This was reiterated in our qualitative research during conversations with people about their worries:

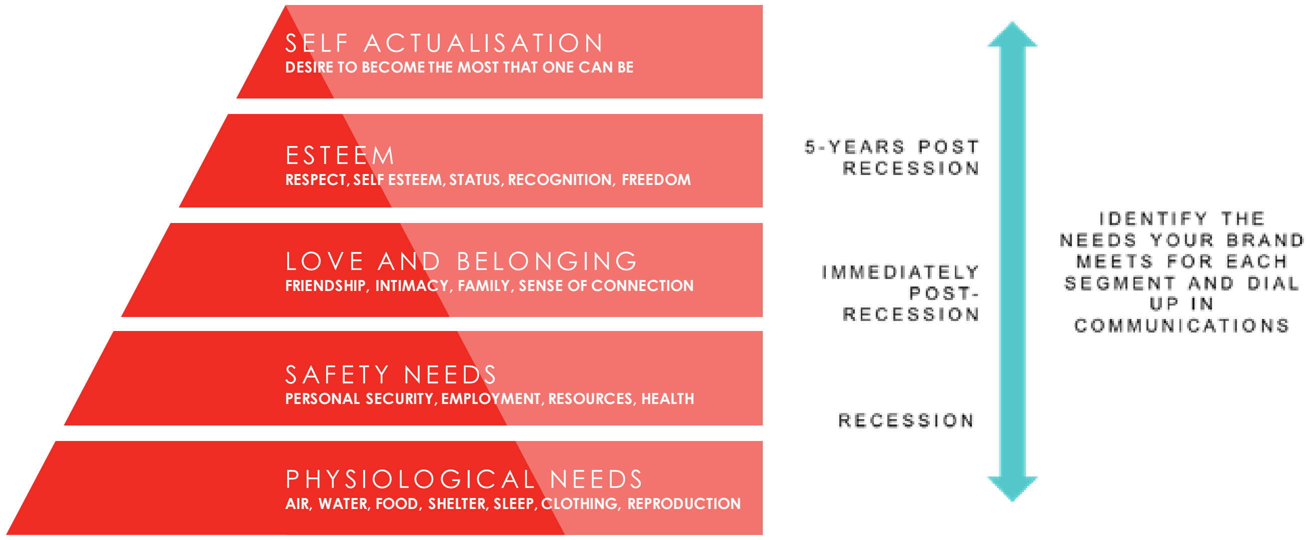
> **"I'M AFRAID I'M A LITTLE BIT SELFISH IN REGARD TO THAT. I'M MAINLY CONCERNED WITH ANYTHING THAT IMPACTS ON ME PERSONALLY. IN TERMS OF WIDER SOCIETAL ISSUES, I DON'T GET INVOLVED UNLESS THEY DO IMPACT ON ME PERSONALLY, SO I'M ACTUALLY NOT CONCERNED ABOUT ENVIRONMENTAL ISSUES OR ANYTHING LIKE THAT."**
>
> Female, 50-54

> **"I THINK MY BIGGEST WORRIES ARE MONEY AND MY CHILDREN. I WORRY MORE ABOUT PERSONAL CONCERNS RATHER THAN WIDER ISSUES."**
>
> Female, 40-44

The UK's concerns have changed over the past five years. We've moved from a time when the economy and our finances were casting a dark shadow over us to today, five years on, where we've adapted to having less. Continued uncertainty about the economy has impacted our financial priorities, meaning that we're less in a savings mindset and, as we experience different things in life, our priorities change, becoming more insular. There is still often a feeling that we should look after ourselves before we look after others – the priority is us.

OMD'S VIEW:

CHANGING PSYCHOLOGICAL NEEDS



This change in our collective worries is important and looking at a needs-based model for marketing, like Maslow's Hierarchy of Needs, can help us to understand what's happening.

When we're in the midst of a recession and times are tough, we take care of our most basic needs. As we move out of recession we need to feel safe and secure. Here, our mindset changes from one of saving to one of indulgence. However, now we are back in a situation of growth and people have adapted to less, we feel the need for a higher purpose – to connect with others and build our own self-esteem – which means that we are focusing on societal needs more.

Brands should find individual purpose for different audiences – some will meet the more basic needs, but others should focus on higher needs around esteem and self-actualisation. All communications and messaging should reflect this purpose, creating value and a narrative for individual audiences.

2 FROM THE UNKNOWN TO CONTENTED RESILIENCE

THE SECOND BIG TREND WE SAW CENTRED AROUND HOW WE FEEL AS A NATION

In 2013, we were feeling the pinch of austerity and the fate of the economy was largely unknown. We saw that people were changing their lives to adapt to the recession. Over half said they were eating out less, a quarter cancelled their holidays, one in five cancelled their gym membership and 3% even put off a divorce or separation as a response to the recession!

Coupled with this, around a third of us also said that we had lowered our aspirations as a response to the recession. We also had a fairly low-level outlook about the future of the country, with only 11% of us saying that we felt optimistic in 2013.

EAT OUT LESS	STOPPED / DECREASED DRINKING	CANCELLED NORMAL HOLIDAY	MORE HOURS/ PART TIME JOB	CANCELLED GYM MEMBERSHIP
51%	32%	25%	22%	21%

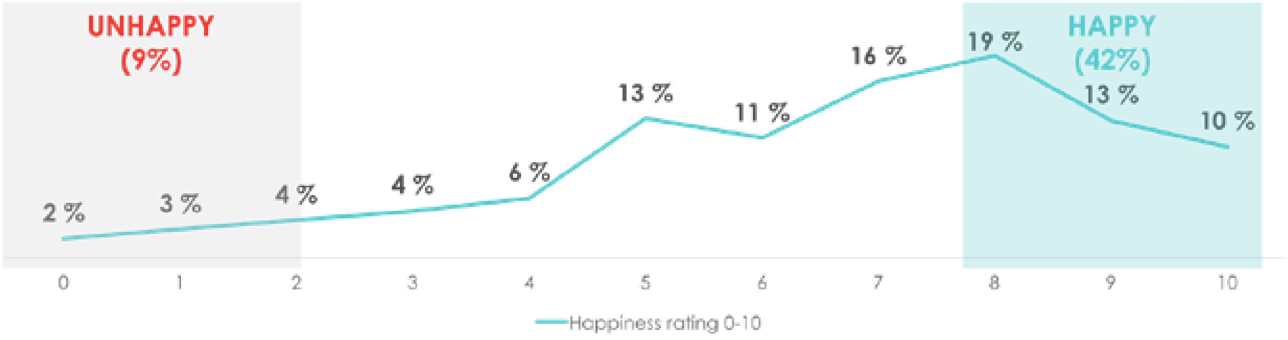
STOPPED / DECREASED SMOKING	STAYED IN A JOB WOULD LIKE TO MOVE ON FROM	DECIDED NOT TO HAVE CHILDREN	PUT OFF DIVORCE / LIVED WITH SOMEONE FOR LONGER
20%	10%	4%	3%

OMD UK, Future of Britain 2013, In which of the following ways, if any, has the recession affected your way of life? Base: 2024

Five years on and we're feeling more optimistic. Although we should be clear; we're not oozing hope and confidence.

20% of Brits now say that they are optimistic about Britain's future, compared to just 11% five years ago. And this feeling of optimism is also reflected in how happy we feel. We asked people how happy they were with their lives, on a scale of 0-10, and found that, on balance, we're a fairly happy bunch - 42% of us rate ourselves as happy and only 9% say we're unhappy.

And this is confirmed by the ONS's well-being study, which asked people how happy they felt yesterday. Overall, the most recent study found that we rate ourselves between 7 and 8, on average, and this has increased over the past five years. Given the turmoil we've experienced over the last half decade, this surprised us. Although one explanation may be that the nation has simply resigned itself to the uncertainty that comes with Brexit and other world events, a term we coin as 'Contented Resilience'



OMD UK, Future Of Britain 2018, How happy are you with life? BASE: 2000

OMD UK, Future of Britain 2018. Which of the flowing statements do you agree with? How happy are you with life? Base: 2000

We also wondered if there is anything about our individual outlook that might help to predict whether we're happy or not, so we conducted a regression analysis, analysing our outlook on different aspects of life, and looked at which of these were most likely to predict how happy we are. We found that the strongest predictor of our happiness is our ability to switch off and relax, followed by being open-minded and progressive in our attitudes, our ability to bounce back from adversity and the amount to which we embrace diversity. If we're able to do all these things, we're more likely to be happy.

We also found a very strong correlation between being happy and feeling financially secure. Feeling financially secure is a pre-requisite for being happy – it's difficult to be happy if we're not financially secure. This helps to explain the fact that we were less happy when we felt less financially secure in the aftermath of the 2013 recession. When in a period of uncertainty about the future and our finances, it was difficult to be happy. As our lives have become more stable, even if we have less, we feel more secure and therefore happier.

BRITAIN IS NOW FEELING A LITTLE MORE HAPPY AND OPTIMISTIC. BUT WHAT DOES THIS MEAN FOR MEDIA AND BRANDS? WE FOUND EVIDENCE THAT PEOPLE FEELING HAPPY HAVE DIFFERENT ATTITUDES AND SPENDING PATTERNS. FOR EXAMPLE, THOSE WHO ARE HAPPY ARE ALSO MORE LIKELY TO:

- Be more open to brands (they like 25% more brands)
- Be less likely to hunt for bargains or be prudent purchasers
- Spend, on average, £1,000 more on holidays per year
- Spend, on average, £7 more per week on groceries
- Have higher levels of trust in brands (average 51% trust in brands, index of 164)
- Be more receptive to advertising (25% agree that ads help them, index of 125)
- Be more 'ad impressionable' (11%, index of 156)

OMD'S VIEW:

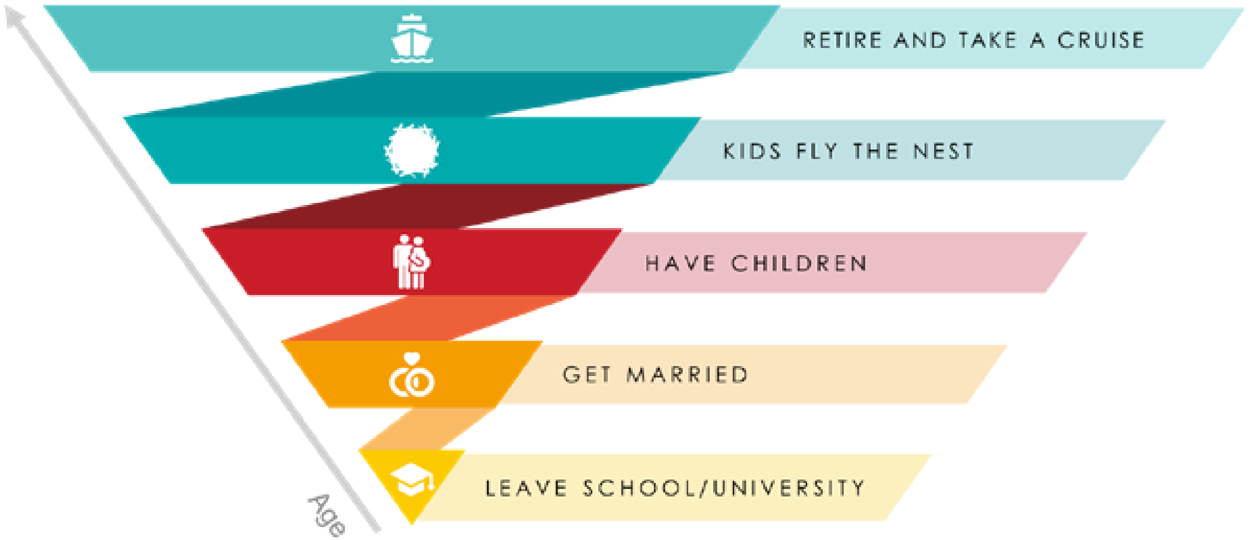
Psychologist, Martin Seligman in Authentic Happiness, talks about how we, as individuals, can use our signature strengths in the service of something much larger than us and that this will, ultimately, help to ensure our happiness. This principle works well for brands too. Brands should work to understand how they contribute to individual and societal happiness and create a narrative and story around this – whether that be saving money, bringing people together, giving people self-esteem or something else.

The power of happiness can also be harnessed in our channel and media selection. With the re-emergence of contextual planning and the cast array of digital signals, reaching audiences by emotion and, in this case when they are feeling positive, is now easier than ever. We know that feeling happy has a positive impact on our reaction to advertising and brands, so we should try to reach people at a time when they feel happy and relaxed. Obviously, this won't work for all brands – if we need to find someone to unblock a drain or fix our boiler then don't plan for happiness – but happiness can be an interesting contextual planning tool that can be used effectively. And, of course, with the wealth of digital signals and mood data that is out there to understand how we're feeling, this will become easier and easier.

3

FROM LESS PREDICTABLE LIFE EVENTS TO LIFE EVENTS BEING EVEN MORE UNPREDICTABLE

There was a time when the marketing industry assumed that life events were relatively simple and straight-forward and the model that we followed was fairly predictable. We assumed that people tended to leave school, get married, have children, bring up those children, they leave home and then we retire and take a cruise. At least that's the dream...



In 2013 however, we found that this model was more complicated than we had assumed. People were not working to the life timetable that had been studiously mapped out for them by marketers. We found that our youth was being prolonged, we were putting off doing those things that signified our move into adulthood and we weren't doing things in the order in which we should – some of us were having children before we got married and others weren't having children at all. And as the population ages, our retirement years are being prolonged and, hopefully becoming healthier.

"LIFE-STAGES, LIFE EVENTS AND HOUSEHOLD STRUCTURES CONTINUE TO EVOLVE AT LIGHTNING PACE ACROSS THE COUNTRY."

Combined with all of this, the structure of our family unit is also changing. When we think about family, we still often go to the stereotype of a heterosexual married couple with two children, with mum staying at home and doing the shopping and dad being the breadwinner and going out to work. But, when we look at the data, families are in fact changing, with over three million families in the UK no longer fitting into this neat little box. The world of parenting and family has, and still is, changing drastically. We now live in a much more fluid and complex world, where families take lots of different shapes and sizes. For example, we have seen a rise of 56% in households that have more than one family in them, from 215k in 2007 to 306k in 2017 (ONS). There are 15% more lone parent families than there was a decade ago, with 1.7 million today(ONS). Same-sex couples with children are also on the rise, with 14k same-sex couples with children now in the UK (ONS).

We can no longer assume that we're ever going to experience the life events that were once assumed. We asked people the age at which they expect to go through a variety of different life events and found that, actually, quite a high proportion never expect to experience them, and this rises when we look at those that are in the youngest age groups. For example, 23% of us never expect to get married and this figure rises to 30% of those aged 18-24. Similarly, 17% of us never expect to buy a property and this rises to 27% of those aged 18-24.

	GET MARRIED	HAVE CHILDREN	BUY FIRST PROPERTY	BUY FIRST CAR	MOVE FROM PARENTS	RETIRE
ALL	23%	25%	17%	15%	6%	18%
18-24S	30%	27%	27%	20%	16%	30%

OMD UK, Future of Britain 2018. Please tell us at what age, if ever, you expect to do the following? Base: 2000

The time that we're experiencing different life events is continuing to change too. In the last five years alone, the age that we start our first job has increased from 22.6 to 24. The age that we're having children has gone up from 29.6 to 32.3 years old, whilst the average age that we get married (not necessarily for the first time) has increased from 34.7 to 37.7. We're seeing huge age shifts, and these aren't happening in a generation, they're happening fast. To assume that we know the process and the timing of different life events can be dangerous.

AVERAGE AGE OF LIFE EVENTS

	START FIRST JOB	MOVE OUT OF PARENTS	HAVE FIRST CHILD	BUY FIRST HOUSE	GET MARRIED
2013 AVG AGE	22.6	25.1	29.6	33.5	34.7
2018 AVG AGE	24.0	25.1	32.3	33.6	37.7
	↑ 1.4	–	↑ 2.7	– 0.1	↑ 3.0

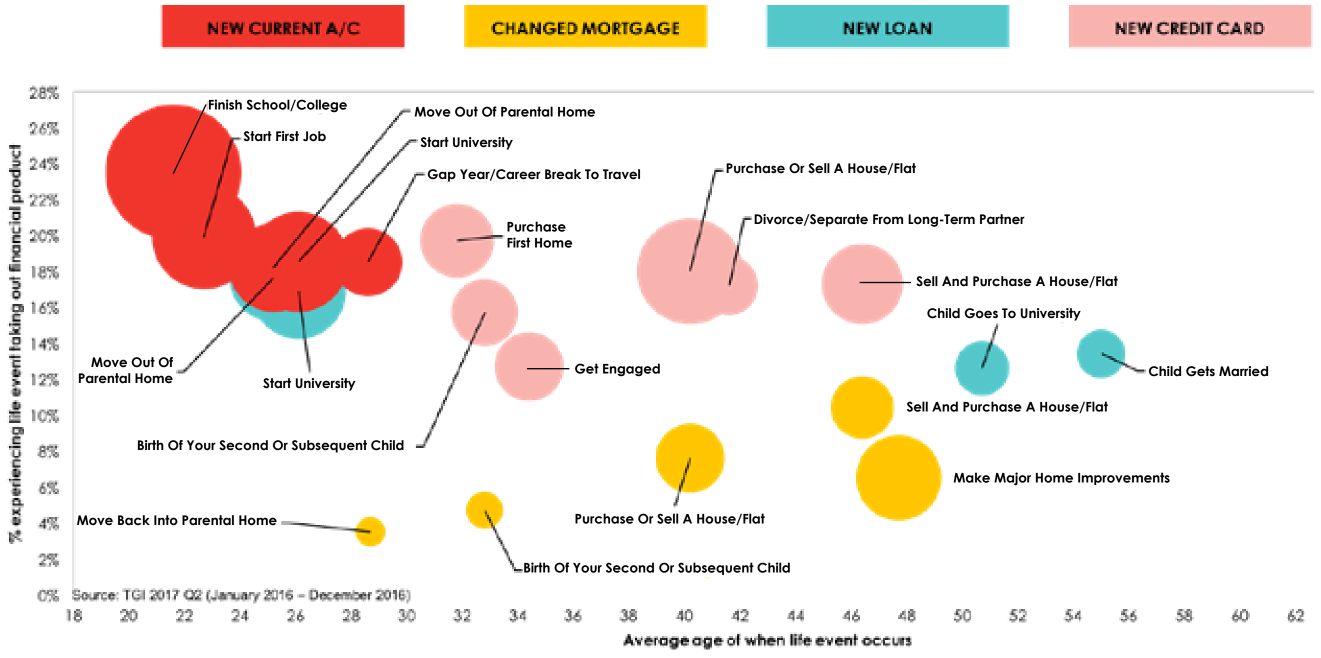
Source: TGI 2013, 2018 (Jan – Dec)

OMD'S VIEW:

Although our life events are becoming less and less predictable and changes are happening at lightning speed, they can still be a useful tool to understand triggers to category entry. There are countless examples of how we can use life events to help us target people at a time when they are more motivated to act. For example, life events can help us to understand various triggers to taking out financial services. The chart opposite shows the proportion of people who undergo a specific life event whilst taking out a financial product, with the size of the bubble relating to how many people experience that event.

As we can see, current accounts are, unsurprisingly, triggered by those life events that occur when we're just starting out in adult life. However, loans and credit cards tend to be triggered by different life events; loans tend to be for a specific event - for example getting engaged or when a child gets married or goes to University - whereas credit cards tend to correlate with less discrete events which require finance, such as house purchases, home improvements or the birth of a child.

Understanding these correlations and the motivations behind them can help us to plan and target media with the right message. However, assuming we know when, where and how people will go through these life events can be dangerous. We need to constantly monitor and understand trends to ensure that we don't fall foul of biased assumptions.



Source: TGI 2017 Q2 (January 2016 – December 2016)

4

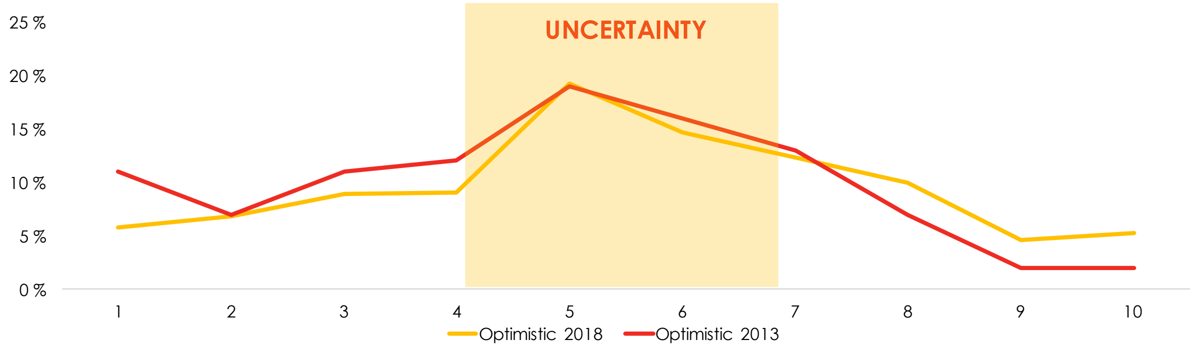
FROM PRIDE IN THE UK TO A DIVIDED UK

Our fourth theme explores the journey that we have been on as a nation, evolving from a proud UK to a more divided one.

When we conducted the first Future of Britain study in 2013, the country was on a high, finally starting to feel some pride following the success of the London 2012 Olympics and Diamond Jubilee after four years of recession and austerity. There was a sense we could do something that we would be proud of.

However, despite growing pride we weren't especially optimistic about Britain's future. The financial crisis still loomed in the rear-view mirror and 1 in 10 of us reported being as pessimistic about the future as our scale would allow.

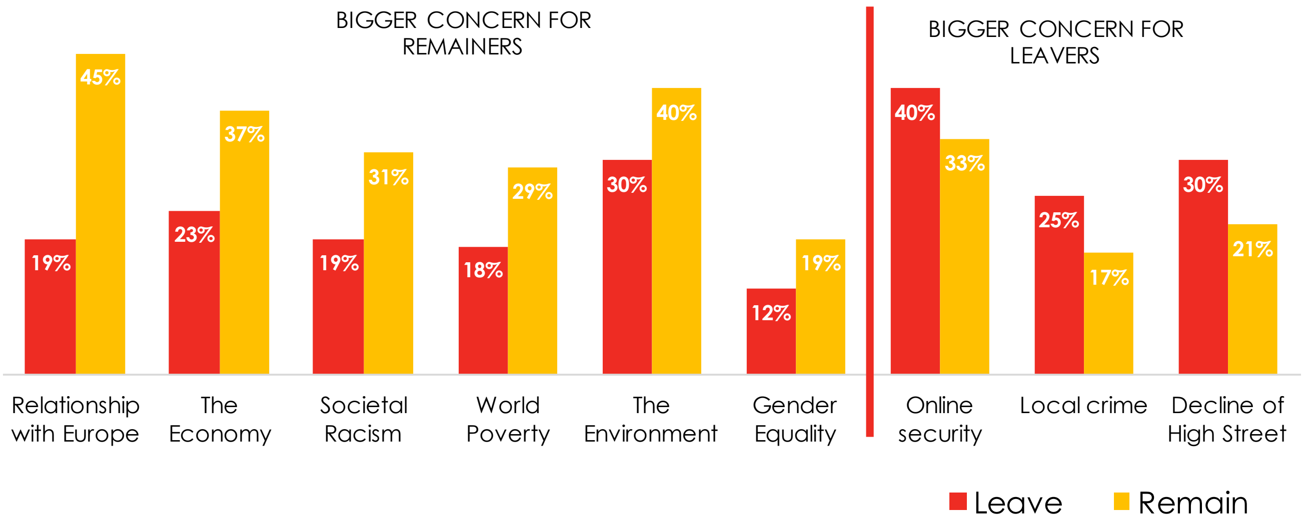
Fast-forward to 2018 and our state of 'Contented Resilience' has made us more optimistic, but there is still a big proportion of uncertainty for the future.



OMD UK, Future of Britain 2018. How optimistic do you feel about the future of Britain/UK? 2013 Base: 2024, 2018 Base: 2000

Unsurprisingly, Brexit has played a big part in driving this uncertainty and dividing the nation. In our survey we asked, *"If there was an EU referendum tomorrow, how would you vote?"*, and although our survey is very different from exit or predictive polls, we still saw that there is still a large divide across the country.

42% WOULD VOTE LEAVE	**47%** WOULD VOTE REMAIN	**11%** EITHER WOULDN'T VOTE, DON'T KNOW OR WOULD RATHER NOT SAY



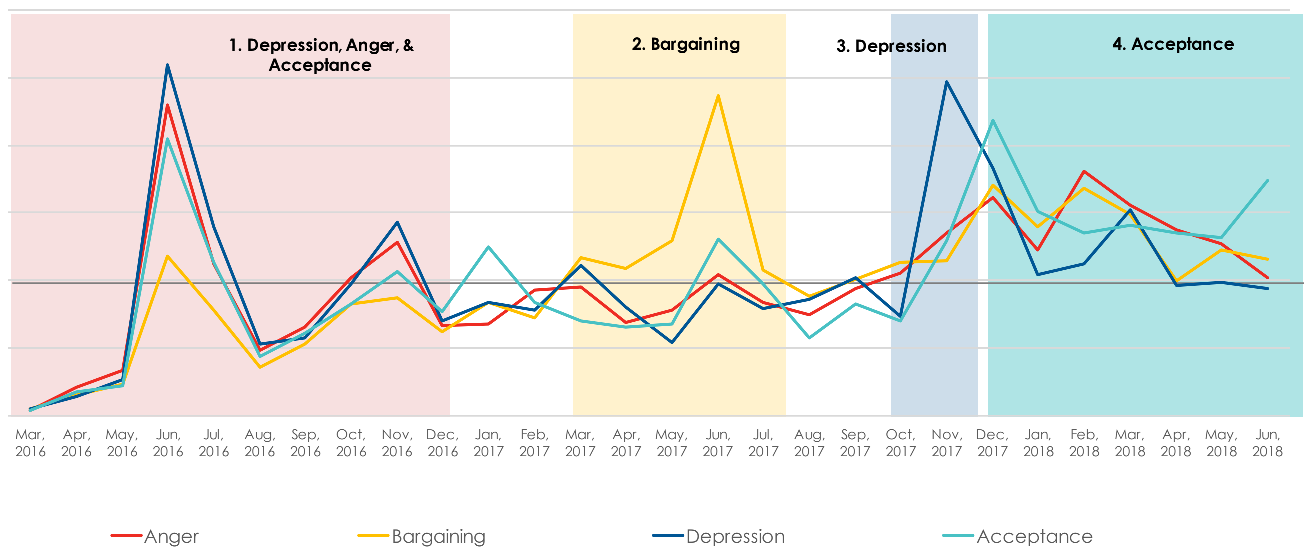
31% LEAVERS | FEEL OPTIMISTIC ABOUT THE FUTURE OF THE UK | **11%** REMAINERS

Source: OMD UK, Future of Britain, 2018. How concerned are you with....? Base: 2000

The Brexit divide continues into what we're worried about. The above image illustrates that our research shows Remainers are more worried about larger societal issues, such as our relationship with Europe, the economy, racism, world poverty, the environment and gender equality. However, those who voted Leave are more likely than Remainers to worry about their immediate surroundings and issues like local crime. There's also a huge difference in outlook of these groups too, with nearly a third of Leavers saying they are optimistic about the future, versus 1 in 10 Remainers.

Regardless of this divide, the vast majority (74%) believe that Britain will leave the European Union. This hasn't always been the case however and getting to this stage of acceptance has taken some time. To try and gauge the different mindsets that we have been through on our Brexit journey we turned to social listening. The chart opposite shows the Brexit social media conversation grouped by four of the five stages of grief; Anger, Bargaining, Depression and Acceptance since March 2016, where the black line is the average.

BREXIT: STAGES OF GRIEF



As you can see, when the EU referendum result was first announced back in June 2016 we went through our most emotional state, with anger, depression and acceptance all significantly over indexing.

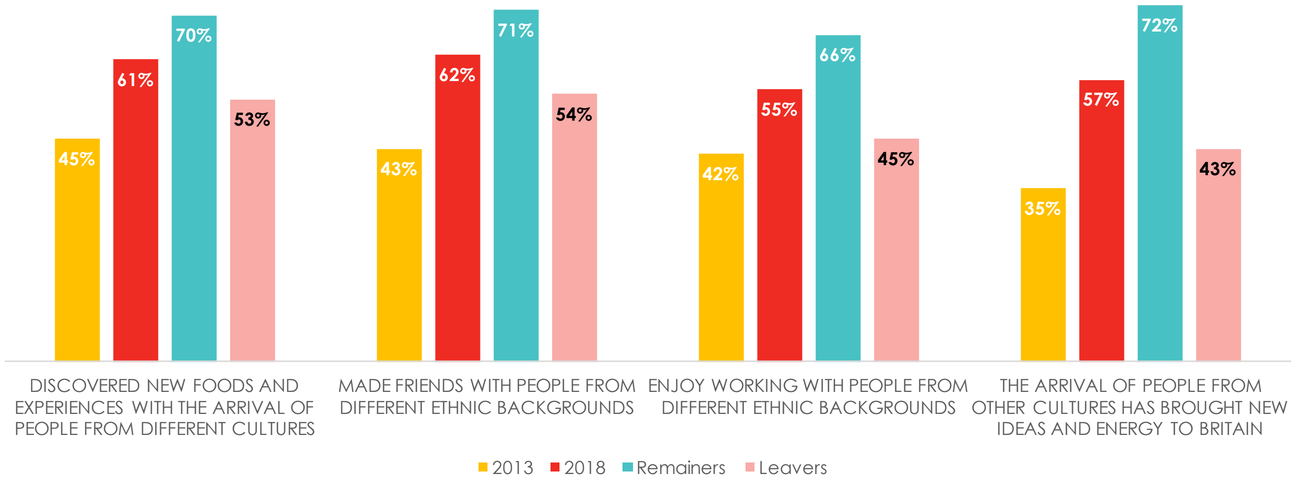
A year on from the initial vote and conversation surrounded bargaining and figuring out what sort of deal our departure from the EU would take. Towards the end of 2017 there was a brief dip into depression, but since January 2018 acceptance has been on the increase. Of course, there will be both Leavers and Remainers in this analysis, but we can see that the country has been through a process similar to that of grieving when coming to accept Brexit.

We often hear the assumption that those who voted to Leave were older, white and that immigration was a key issue for all Leavers. However, we should be wary about jumping to such conclusions as the reality is much more complex than that.

We looked at our attitudes to multiculturalism and the first thing that became apparent was that we have embraced different cultures much more since 2013. We are now, as a population, much more likely to see the positives from different cultures in terms of food, who we are friends with and the values of the country.

When we look at these figures for Leavers and Remainers, we unsurprisingly see that Remainers are the most positive and open of all groups. However, interestingly, the Leavers are more positive than the country was in 2013. Those that voted Leave are now more likely to say they embrace multiculturalism than the entire population did in 2013. Assuming that a Leave vote was all about immigration is dangerous.

We're also seeing an increase in other societal divisions. From age to gender, with the me-too marches through to race and ethnicity, there are divides appearing across the whole of society.



Source: OMD UK, Future of Britain 2013, 2018. Looking back at the last 5 years, and your own experiences during that time, how much do you agree or disagree with the following statements? Base: 2013: 2024, 2018: 2000

OMD'S VIEW:

Brexit showed us how inaction or, conversely, galvanising around a cause can have big results. Although we see a country that is very clearly divided along the Leave / Remain split, we are seeing many divides across society right now, through groups being spurred on to make sure their voices are heard. However, the spirit of 2012 is also still with us and the recent World Cup and Royal Wedding have shown how we also come together in unity when there's something to celebrate.

Brands can help to foster this feeling of unity and show solidarity with groups that may feel like they need a voice. Brands like Cancer Research often do a great job in ensuring that those affected by cancer feel a sense of unity and in volatile times we often need enablers, which can be a core role for brands.

Audience segmentations can be a really valuable way to pull out the nuances amongst societal fractures. Working with our Annalect Marketing Science team, we conducted an attitudinal segmentation of the country and found that, although there is a key divide surrounding Brexit, there are also smaller groups with other concerns. We identified the following groups:

THE OPTIMISTS:

WHO ARE URBAN, YOUNG, SAVVY SHOPPERS WHO VALUE TECHNOLOGY AND LIBERALISM.

THE DISENGAGED:

WHO ARE YOUNG, WITH LITTLE INTEREST IN CURRENT AFFAIRS, THE LEAST LIKELY TO HAVE VOTED AND NOT PARTICULARLY INTERESTED IN TECHNOLOGY.

THE LIBERAL TRADITIONALISTS:

OLDER, UNENCUMBERED LIBERALS WHO ARE INTERESTED IN THE WORLD AROUND THEM. THEY DESIRE QUALITY AND VALUE AND HAVE STRONG BELIEFS ABOUT THE WORLD THAT ARE NOT EASILY SHIFTED.

THE DOWN-TRODDEN FAMILIES:

THOSE WHO HAVE BEEN THROUGH DIFFICULT TIMES. THEY ARE THE LEAST HAPPY, MOST STRESSED AND ARE MORE CONCERNED WITH DAY-TO-DAY LIFE THAN THEY ARE WITH SOLVING THE WORLD'S PROBLEMS. THEY USE VALUE-DRIVEN AND CONVENIENCE BRANDS AND FEEL OVERWHELMED BY MEDIA AND TECHNOLOGY.

THE CONSERVATIVE TRADITIONALISTS:

VERY SIMILAR TO THE LIBERAL TRADITIONALISTS BUT LESS LIBERAL AND LESS ENGAGED WITH COMMUNITY ISSUES. THEY LIKE TRADITIONAL, HIGH-QUALITY BRANDS AND ARE NOT ENGAGED WITH TECHNOLOGY AND MEDIA.

From this segmentation we can see the expected profile of Leavers and Remainers in the form of the Conservative and Liberal traditionalists, however, it also shows that smaller groups, such as The Disengaged, don't fit either bucket but are still a significant chunk of the population. Segmentations help us to understand our audiences better and talk to their needs and motivations.

5

FROM OVERWHELMED BY MEDIA TO SMART CURATORS

OUR FINAL TREND CONCERNS OUR RELATIONSHIP WITH MEDIA AND TECHNOLOGY, AND HOW THIS HAS CHANGED OVER THE PAST HALF-DECADE

In 2013 we were in the midst of a technological and media shift. We were starting to consume content differently: smartphones were becoming commonplace and tech innovation was rapidly on the increase. Along with this changing landscape came a feeling of being overwhelmed with brand messages, advertising and new models of media.

In our 2018 study, we found that we still sometimes feel overwhelmed and addicted to our phones but that, based on the increase of technology in general in our lives, these figures had not increased as we might have expected. It's worth noting that in 2013 just 55% of the UK had a smartphone, vs 81% today – almost a 50% increase over five years (Ipsos Tech Tracker).

50% OF US FEEL BOMBARDED BY BRAND MESSAGES

50% OF PEOPLE FEEL THEY RECEIVE TOO MUCH INFORMATION FROM BRANDS

45% FEEL THAT THERE'S NOT ENOUGH TIME IN THE DAY

52% FEEL THAT THEY OFTEN CHECK THEIR PHONE FOR NO REASON

43% FEEL THEY CHECK THEIR MOBILES FAR TOO MUCH OVER THE DAY

Sometimes we do feel overwhelmed, but this is not an issue for the majority of us in our everyday lives. We found more evidence of this when we asked people if they would like a technological 'ignore button'. In 2013 we found that 71% said yes, whereas in 2018 it's 11 points less at 60%. As one of our community participants put it:

"Do I want an ignore button? No. I'm perfectly capable of turning things off."

"IN 2013, 71% OF THE NATION WISHED THEY HAD A TECHNOLOGICAL IGNORE BUTTON. IN 2018, THIS FIGURE HAS DROPPED TO 60%"

The nation is now taking control of its consumption of media and content. The last decade has been characterised by an explosion of different forms of entertainment and news, however, this market has now consolidated and settled slightly, and people understand where to get the news, entertainment and sport they want. They know their favourite apps and no longer feel that every new app is worthy of experiment. Having experienced information overload, people are now evaluating the information coming through to them, personalising Facebook feeds, muting people that irritate them without having to delete them, choosing who to follow on Twitter and deleting those handles initially followed but that are now no longer relevant.

And we're doing all these things that curate the amount of information coming through to our handsets. As well as becoming smarter at switching off, we also see the benefits of new technology – 75% of us feel more knowledgeable because of the internet and 45% of us feel more creative because of it. The internet is seen as a force for good in our lives, rather than just sucking up our time, which there has been a general consensus of in the past:

"I THINK IT IS BOTH; TECHNOLOGY DEFINITELY HELPS ORGANISE MY DAY. IT HELPS ME GET A GAZILLION MORE THINGS DONE THAN I COULD IF I DIDN'T HAVE TECHNOLOGY. EVEN TO HELP SIMPLE THINGS, SUCH AS A TOMTOM OR SATNAV IN YOUR CAR."

Female, 45-59

It seems we might be reaching a healthy balance where we are able to personalise, screen and curate the information that's reaching us.

We found in 2013 that we were in a position of information overload, whereas now we're moving towards a place of perfect information; allowing easy access to everything needed, but without being overwhelmed.

INFORMATION OVERLOAD VS **PERFECT INFORMATION**

51% THERE'S SO MUCH CHOICE THAT THEY FIND IT HARD TO MAKE A DECISION

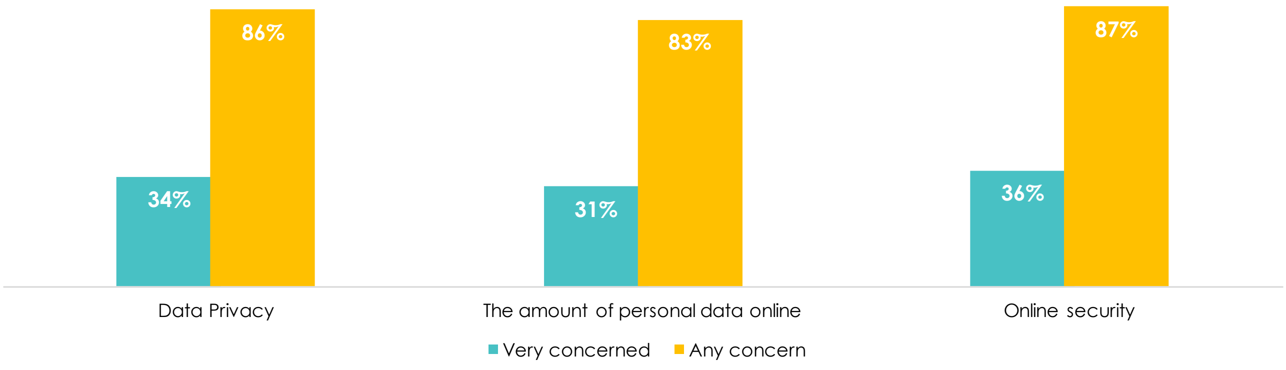
40% FIND IT HARD TO FILTER OUT WHAT'S IMPORTANT AND WHAT'S NOT ON THE INTERNET

75% FEEL MORE KNOWLEDGEABLE WITH THE INTERNET

65% AGREE THAT TECHNOLOGY HAS ENHANCED SOCIETY

Source: OMD UK, Future of Britain, 2018. Please tell us which of the following statements you agree with? Base: 2000

But there is a word of warning - we're becoming more concerned about the amount of personal info that's 'out there'. For the first time in our research, we asked if data privacy, the amount of personal data 'out there' and online security were of concern. Over 85% of the population is concerned about each of these, with over a third of the population being very concerned. To put that into context, these figures are roughly the same as the proportion of people that are worried about the environment.



Source: OMD UK, Future of Britain, 2018. How concerned are you with....? Base: 2000

However, in our qualitative work, we found a surprisingly high level of understanding in the value exchange that exists in the world of online data – people understand that they give their data in exchange for content or services. The biggest issues we found were not around the use of data for marketing, but more around the potential abuse of our data around hacking:

"I'VE STARTED TO WORRY WITH RECENT NEWS EVENTS ABOUT THE AMOUNT OF PERSONAL DATA THAT I GIVE AWAY. I USE A FITBIT, I PUT MY DIETARY INTAKE INTO MYFITNESSPAL, AND I WONDER IF THAT INFORMATION WILL END UP WITH AN INSURANCE COMPANY OR PENSION COMPANY AND WILL COME BACK TO HAUNT ME IN LATER LIFE. WILL IT AFFECT MY INSURANCE PREMIUMS OR MY PENSION ANNUITY? THEN THERE'S DATA THAT IS COLLECTED ON FACEBOOK OR SOCIAL MEDIA. I THINK THERE ARE HUGE GAPS IN THE LAWS THAT SHOULD BE CHANGED TO PROTECT CONSUMER'S DATA."

Male, 40-44

OMD'S VIEW:

We have moved from a time when we felt overwhelmed and bombarded by media and brands to a time when this has become less prevalent. We are now Smart Curators.

Some of us still feel overwhelmed from time to time but this is not a constant and, on balance, we feel like we have control; that we can filter, that we can personalise, that we can choose the information that we receive.

With GDPR raising awareness about the volume of personal data made available, there is a general understanding of the value exchange that exists between audiences providing data and accessing content.

However, there is also a genuine concern about who personal data is being accessed by and how it is being used. Those dealing with personal data have a huge responsibility to treat this relationship with absolute respect. In this new environment, trust will be even more important, and abuse of this trust will be hugely damaging for brands.

AT OMD UK, WE ESTABLISHED THE FUTURE OF BRITAIN IN 2013 TO LISTEN TO THE VOICE OF THE ENTIRE COUNTRY AND ENSURE THAT REAL PEOPLE WERE AT THE HEART OF OUR PLANNING. FIVE YEARS ON AND THIS INITIATIVE HAS PROVED MORE VALUE THAN EVER AS THE COUNTRY CONTINUES TO GO THROUGH SEISMIC CHANGES. OUR NEW STUDY PROVES THE VALUE OF STAYING CONSTANTLY VIGILANT AND LISTENING TO HOW THE WORLD AROUND US CHANGES. ONLY THROUGH THIS CULTURE OF CURIOSITY AND LISTENING CAN WE HOPE TO ENSURE THAT OUR COMMUNICATIONS STAY GROUNDED IN WHAT PEOPLE REALLY THINK, FEEL AND DO.

Our Future of Britain, Five Years On study is extensive but we've covered only a selection of our data and insight in this white paper. We have a wealth of knowledge and understanding, including brand and category cuts of the data, and would be delighted to discuss our findings with you.

If this is of interest, please contact sarah.gale@omd.com or joe.wilson@omd.com.

OMD