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10 trends

Values

Overview

"Values" is one 15 dimensions that we use to examine trends in UK consumers and society. Here we outline ten key trends from our trend bank to illustrate the nature of some of the changes in this area. These trends create continuing and new opportunities and risks to many organisations in coming years.
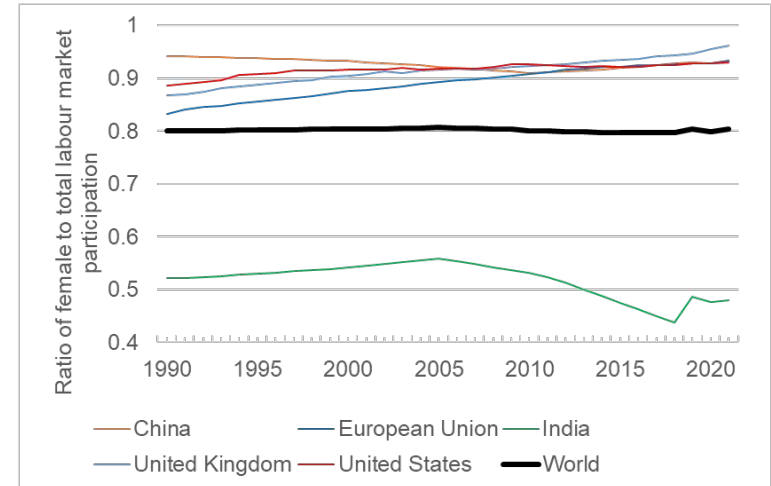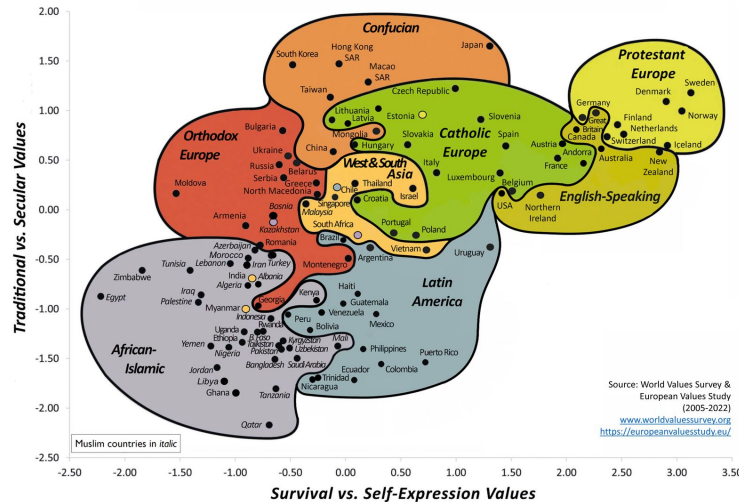
Britain has roundly become more liberal over decades, as demonstrated by a series of attitudes towards immigration, sex and marriage. However, particularly following the Brexit referendum, a new culture war has presented itself between competing ideals for the country. There is also a wider international context to this debate, with different perspectives emerging on the desirability of globalism, with a series of right of centre parties emerging across Europe. While the prospect of such a rise in Britain is presently low, there is a growing consensus that the mainstream political parties are failing, untrustworthy and the country is broken as it navigates global changes within the country.

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Global context

Amongst research trackers of citizen attitudes, the World Values Survey positions nations on two axes: traditional vs. secular-rational values and survival vs. self-expression values. Over recent decades, growing economic prosperity has generally moved nations toward the top right of the cultural map (left diagram). However favourable impressions of the US and belief that the US is the world leading economy are reducing since Obama's presidency. Within the West itself, including the UK, values are generally more socially-liberal and gender equality is noticeably increasing in the labour market (right).

Indicators of global attitudes and values: a) the Inglehart-Welzel cultural map (2023), b) female labour market participation

Source: World Values Survey &
European Values Study
(2005-2022)
www.worldvaluessurvey.org
https://europeanvaluesstudy.eu/

Source: Global Attitudes Survey 2023, World Bank data

10 UK trends

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Interventionism

01

About: The role of government was reduced by the 1979-97 Conservative government and not fundamentally changed by Labour after that. However, , that trend was reversed in the wake of the banking crisis of 2007 to 2008. Calls for Government interventions also took place in the cost of living crisis and COVID in quick succession. More people than not are now also looking for Government-led solutions to challenges like the costs of childcare (British Social Attitudes, 2023).

Responses: Businesses have responded with various schemes to help tackle social challenges, notably the cost of living crisis. For instance, in 2022, HSBC, John Lewis and Virgin Media O2 gave employees on lower-to-mid range salaries additional payments. More businesses are also offering flexibility to help parents deal with childcare.

Future business opportunities & challenges: Higher taxes and regulations could spread social costs to businesses. Organisations will also come under increasing scrutiny for being perceived to exploit profitable niches or opportunities - as seen with the backlash against petrol companies after the Ukraine war and criticism of supermarkets that increased prices of own-brand or budget ranges.

Age of mistrust

02

Photo by Siora Photography on Unsplash

About: Trust is declining in both politicians and the media. Only 20% of the UK now trust politicians of any party (ONS, 2023) - which has more than halved over three decades. Trust in the UK media is also amongst the lowest reported in the world (Reuters). More people have also become sceptical of bands, with one poll showing that 64% of consumers felt companies were putting up prices to boost their own profits whereas only 29% thought it was because prices were going up (Lord Ashcroft polls)

Responses: Supermarket chains have sought to make pledges to reassure customers - Tesco employed a "price promise" strategy and Sainsbury a "Price Match" campaign. Clothing retailers have embraced free returns policies, to overcome consumer reticence. Some companies have strived for transparency in their practices, rather than propositions. such as Lush, who create an annual sustainability report. .

Future business opportunities & challenges: Social media means that brand reputation can be harmed more quickly than ever. Conversely, brands that commit to being trusted and understand consumer perception, can gain long term advantages.

Towards liberalism, mainly

03

John Bull: "Are these *my* Islands or yours?"

Photo by LSE Library on Unsplash

About: Attitudes have become more secular and liberal over recent decades: Most don't hold to traditional gender roles. 78% agree that "premarital sex is not wrong at all" c.f. 42% in 1983. Support for a woman's right to choose an abortion rose from 37% in 1983 to 76%. However, liberalism towards trans-gender issues reversed recently e.g. 30% think someone should be able to have the sex on their birth certificate altered if they want, down from 53% in 2019 (British Social Attitudes survey 40).

Responses: Organisations have become more overtly liberal, particularly larger, international organisations with more diverse workforces. Brands have adopted social causes (e.g. LGBTQ, race-related and climate change), embarked on staff training and created more overtly political and inclusive forms of advertising. .

Future business opportunities & challenges: Organisations face a broad imperative to align with these prevailing trends. As more organisations gain credentials for sustainability and EDI, others run the risk of being frozen out of supply chains as businesses seek accredited partners. However, some cases (mainly in the US, such as with Bud Lite) have shown campaigns can also backfire if a prevailing mood changes.

Pragmatic compromise

04

Photo by Harli Marten on Unsplash

About: The research company More in Common have done a series of ongoing studies into diversity in UK opinion, particularly around contentious debates. While polarised views are typically presented in the media, they found more of a consensus, with issues resolved pragmatically rather than ideologically: "From debates about trans and gender identity to specific local planning issues, we find that far from being up in arms about many debates, most Brits are balancers, tired of the loudest voices dominating debates, and eager for us just to get on with it quietly, less talk, less fuss and more action".

Responses: Brands have adopted different positions in response to the culture wars - either taking the more liberal standpoint or seeking to portray and promote more unifying views.

Future business opportunities & challenges: As the world becomes more multicultural, businesses will continue to be challenged to navigate different values.

Broken Britain

05

Photo by Nick Fewings on Unsplash

About: In a 2023 poll, 72% agreed with the statement "Britain is broken – people are getting poorer, nothing seems to work properly, and we need big changes to the way the country works." (Lord Ashcroft polls, 2023). 68% believe the police have given up on trying to solve crimes like shoplifting and burglaries altogether (More in Common).

Responses: Some companies have reduced investment, with it leading to a surge of British company investment in Germany in the last 1-2 years (Independent). However, overall, YOY investment in British business grew 9% in Q2-2023 (ONS). Some major companies also announced further investments in the UK like Sony and Google, who both stated an intention to create 1000 jobs. Others have sought to provide more grassroots community based support e.g. Tesco runs a community grants programme. Some advertising has attempted to engender camaraderie e.g. "We are Boden".

Future business opportunities & challenges: Uncertainty surrounds the future of Britain's mid and longer term economic trajectory.

God and politics

Photo by Nathan Dumlao on Unsplash

About: Having religious belief appears to correlate with political belief: "More than half (53%) of the British public now describe themselves as having "no religion", up from 48% in 2015, coinciding with a rise disillusionment with politics and lower engagement with the news (British Social Attitudes 34).. Meanwhile, over half of adults in England and Wales who identified as Sikh or Muslim reported that they consider political beliefs important to their sense of who they are (60% and 55%, respectively) in 2016 to 2018 (ONS).

Responses: Brands have responded in different ways to the decline of faith and the inter-relationship between religion and politics - ranging from the overt inclusion of people of different faiths in adverts, the their avoidance, and support for secular causes like education, health, and environmental protection..

Future business opportunities & challenges: Navigating disparate values in an increasingly diverse society will remain challenging.

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What is tolerance?

Photo by Lucas van Oort on Unsplash

About: There is now an almost equal split between people who think that people are too easily offended and people need to be more sensitive - and a strong split in attitudes between Labour and Conservative supporters, as well as by age and gender (Ipsos Mori). At the same time as there is a recognition of sensitivity and inclusion, there is also a rise in sentiments that free speech is under threat, including personal fears: e.g. half of students feel universities are becoming less tolerant (THE).

Responses: Brands have generally sided with liberal/progressive perspectives in controlling discourse of staff and adapting their own language to be sensitive to different groups and causes.

Future business opportunities & challenges: While brands have generally pursued the view that people need to be more sensitive, society remains divided over the issue, meaning that brands may need to be be prepared to lose customers to uphold their ideas, as well as apologise for mistakes as they occur in increasingly complex scenarios..

Climate action gaps

Photo by Lucas van Oort on Unsplash

About: Despite widespread concern about climate change (e.g. most think the Government is not doing enough), only 9m people use a green energy tarifff. Far fewer are adopting more expensive items like cars or heat pumps or solar panels 2 in 3 favour Government spending less on climate change (ONS), while also wanting them to do more.

Responses: The cost of living is creating conflicting priorities for some consumers. Brands are adapting policies to green supply chains that are effectively removing investment decisions from most consumers, and ensuring their goods and services are on a pathway to net zero.

Future business opportunities & challenges: Costs of net zero could rise, while the additional costs added on the price of goods could be a disadvantage against cheaper imports from countries where labour costs are lower and the costs of decarbonisation are lower.

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Postmodernism

09

Photo by Markus Spiske on Unsplash

About: Postmodernism was an idea ascribed to different times in history but first used as a term by John Watkins Chapman in 1870: It is effectively an intellectual stance that there are truths for each individual or group, and is sceptical and hostile to the idea of universal truths for all groups. In recent decades, ideas have grown in various academic fields like philosophy, literary criticism, and cultural studies, as well as postmodern fiction (e.g. Catch 22, Eternal Sunshine of the Spotless Mind) and film (e.g. Pulp Fiction, FIght Club)

Responses: Particularly over the past 15-20 years, companies have imbued brand experiences with values outside of tangible realities, and also embraced the idea of questioning authority and reality at the boundaries (e.g. Mark Lives, Content Chef).

Future business opportunities & challenges: Brands need to tread carefully. On the one hand, there can benefits from empathising with postmodern-oriented consumers, but on the other, it can create an authenticity gap when the idea of the company itself is apposite postmodern.

New nationalism

Photo by Chuko Cribb on Unsplash

About: The concept of "nation state" is being rethought and re-defined in light of multicultural populations. One measure of this is that "British" people do not necessarily think other Britons need to have been born here to be British (17% do, but 48% did in 1995) (British Social Attitudes survey 39). Minority populations are now more likely to cite their nationality as British than white populations (LSE, 2019). At the same time, fewer are proud of Britain's history as recent events have generated multiple perspectives on the past.

Responses: Advertising and marketing has clearly separated the concepts of nationality and ethnicity, and promoted a more inclusive civic and multicultural perspective on Britishness. There has also been a quiet withdrawal of "Buy British" campaigns over decades, once promoted by Government or sectors (LSE).

Future business opportunities & challenges: Identities are fragmented and national identity is less important than it once was for many of the population. It is also taking on new meanings. Brands need to retain a good understanding of the contemporary cultural trends and their impact on identities which define emerging consumers.

Factors affecting the future

Perspectives on the future: Narendra Modi, Indian PM

Social media is reducing social barriers. It connects people on the strength of human values, not identities.

Perspectives on the future: Sherry Turkle, MIT sociology professor

Technology challenges us to assert our human values, which means that first of all, we have to figure out what they are.

Key factors affecting the future UK trajectory

01

New authorities

Traditional authorities (e.g. politicians and the Royal Family) are losing their role as "pillars of society". Future authorities and their form have a vacuum to fill.

03

The nature of co-existence

As society becomes more diverse in its cultural composition, there are questions on the nature of societal cohesion - or even whether it is necessary or desirable.
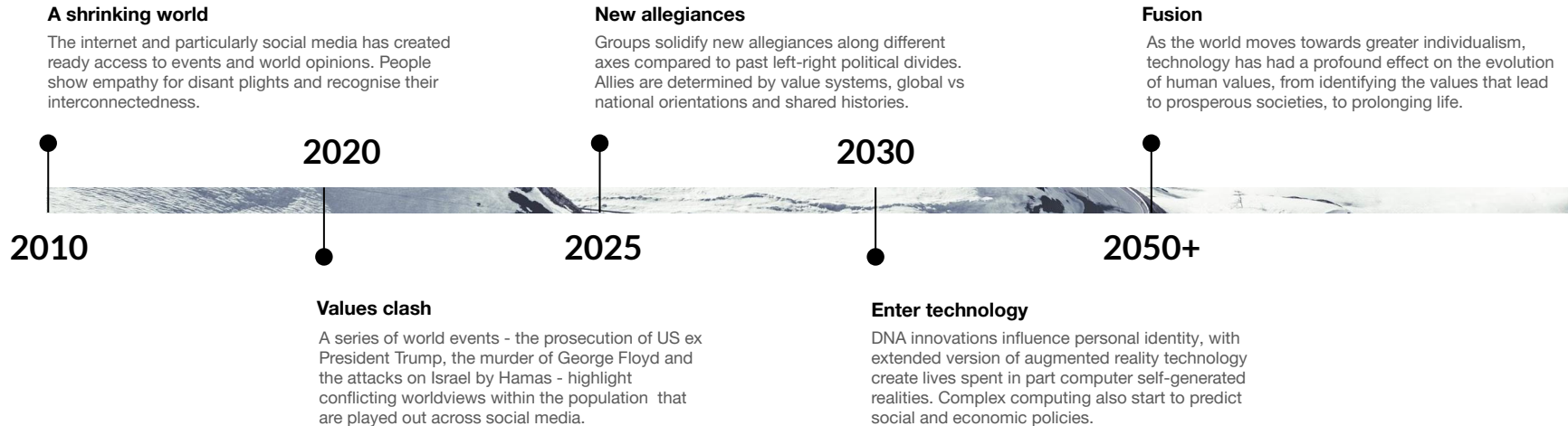
02

New questions

AI and extended realities may drive new ethical questions, such as advanced surveillance, predicting the future, human-technology implantation, or the rights granted to sentient robots.

Timeline

Various scenarios are plausible. One sees technology advance to take a prominent role in society and ecology; informing and advancing human thriving.

A shrinking world

The internet and particularly social media has created ready access to events and world opinions. People show empathy for disant plights and recognise their interconnectedness.

New allegiances

Groups solidify new allegiances along different axes compared to past left-right political divides. Allies are determined by value systems, global vs national orientations and shared histories.

Fusion

As the world moves towards greater individualism, technology has had a profound effect on the evolution of human values, from identifying the values that lead to prosperous societies, to prolonging life.

2020

2030

2010

2025

2050+

Values clash

A series of world events - the prosecution of US ex President Trump, the murder of George Floyd and the attacks on Israel by Hamas - highlight conflicting worldviews within the population that are played out across social media.

Enter technology

DNA innovations influence personal identity, with extended version of augmented reality technology create lives spent in part computer self-generated realities. Complex computing also start to predict social and economic policies.

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X2Y help SMEs to navigate trends, strengthen strategies and find innovation opportunities. We source the insight that matters from global sources, primary and secondary research, data, and global or national experts.

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