

THE PARTNERS



TO OR NOT TO BE

DECODING THE
GREAT BRITISH
IDENTITY CRISIS:
BUILDING SUCCESSFUL
BRITISH BRANDS
POST-BREXIT

The Partners' Perspectives

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THE EXECUTIVE SUMMARY

Brexit exposes a crisis in modern British identity. But it also provides a moment for reflection on what Britishness represents. We wanted, post-Brexit, to pose the question: what does Britishness mean for brands now? Are people loyal to brands because they are British or because they are good at what they do and incidentally British? Will 'Britishness' for brands in a post-referendum world need to change course, and what is the role of brands in shaping future opinions towards this particular notion of provenance?

THE EXECUTIVE SUMMARY CONTINUED

We found that a crisis of identity exists for many brands looking to utilise their British provenance, for a whole host of reasons, from lack of clarity on consumers to it being a difficult set of attributes to employ.

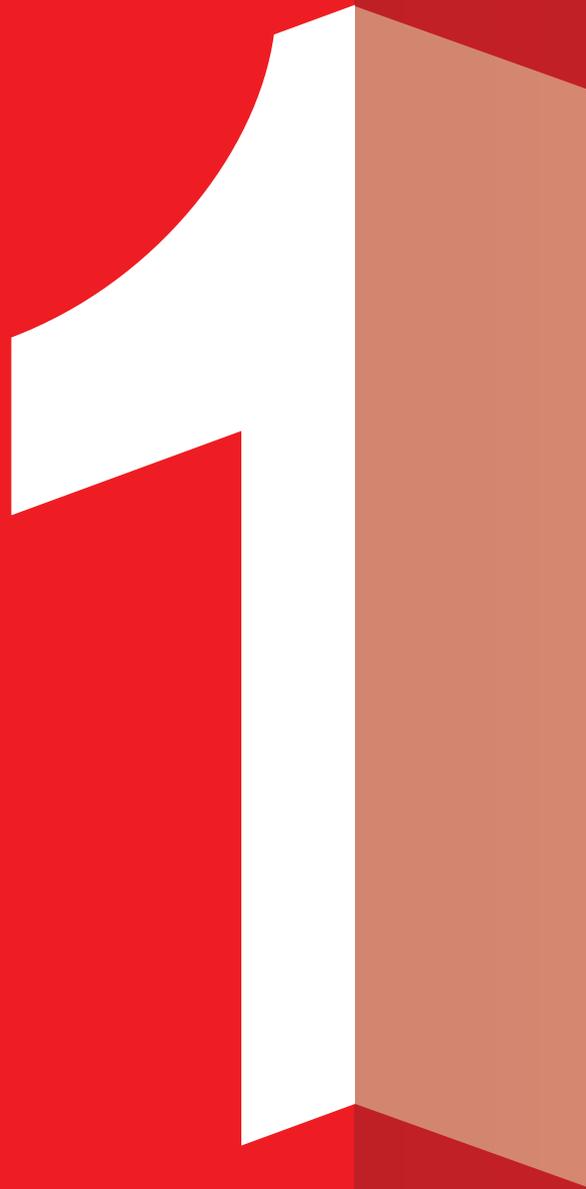
Combining the findings of a comprehensive omnibus survey we conducted on the general public's perception of British brands with in-depth interviews with leading marketers working in British companies and institutions, we've explored the key challenges when harnessing the power of national provenance for British brands today. We extracted the key insights into how to use and understand this asset post-Brexit.

We found that a crisis of identity exists for many brands looking to utilise their British provenance, for a whole host of reasons, from lack of clarity on consumers to it being a difficult set of attributes to employ. Brexit forces a choice, a fork in the road where brands can continue to assimilate in a global order of homogeneity or can choose to refamiliarise themselves with the ingredients that make Britishness a potent force.

By creating a balance of ingenuity and tradition, the progressive and the conservative, this report argues that it is time brands meaningfully attempt to redefine Britishness and take control of the national narrative in a way which is unique to their product or service.

- British brands are experiencing an identity crisis. They have lost their way in the use of British provenance. This has led some to narrow interpretations of what Britishness means and others to underplay Britishness, indicating an alleged diminishing importance. This is a mistake.

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- Brexit is a compounding factor, rather than the cause of this identity crisis. It led to a great deal of soul-searching into what Britishness represents and fuelled discussion on the topic. It also offers an opportunity to take a step back and re-evaluate the landscape in an honest, constructive manner.
 - For consumers, what appears to be ambivalence to the value of Britishness masks an opportunity for brands to redefine the roles they play in a world where homogeneity is leading to calls for a greater sense of provenance. It's worth noting that Britishness is still the most important brand attribute to one in four British consumers. That alone confirms it's still a powerful tool.
 - Outlining a stringent definition of Britishness is challenging. However, the esoteric and dualistic nature of Britishness allows for greater freedom of expression. The lack of firm, coherent attributes empowers brands to express themselves through the contradictions and tensions of a fluid definition.
 - Balancing the tension between tradition and ingenuity, which is at the heart of Britishness, is the key to creating a compelling narrative. This can be used to strengthen British brands for consumers in diverse marketplaces worldwide.



INTRODUCTION

INTRODUCTION

Brands are a dominant institution of the 21st century, and they can play a defining role in interpreting and projecting the nation's values and identity at home and abroad. Yet in Britain 2017, the components that define 'Britishness' feel more intangible and elusive than ever, occupying a fluid definition or set of definitions. An ever-changing notion, it is affected by the delicate socio-political and economic ecosystem surrounding it. It's a set of brand codes that exists almost constantly in flux, tangled by history, a paradox.

We know that relying on national stereotype, or championing 'Britishness' as a key proponent of your brand, does not merit automatic success. Yet, in a marketplace that can feel homogenous, provenance can still play a key role in creating genuine differentiation.

It's a strategic necessity for brands to work out to whom they appeal in a globalised yet socially-fragmented society. They need to address provenance in a way which is sincere and meaningful for their audiences. This may be by embracing the highly local or through championing a global perspective. However, in the current climate, there's an aversion to tackling the issues which make Britishness such a complex condition to employ. This has led to a crisis in how Britishness is used in branding. Brexit has confirmed that the gap between brands and consumers may be broader than previously anticipated, making the task of harnessing national provenance feel even more overwhelming. However, it does provide a highly significant moment for brand reflection and introspection. The codes of 'Britishness' can still play an important role in guiding branding principles and imbuing creative differentiation.

It's a strategic necessity for brands to work out to whom they appeal in a globalised yet socially-fragmented society.

It's necessary to establish how a brand's story is told to the British people, as well as how it's interpreted on the global stage. External images are not easily separable from internal perceptions. Yes, it's a delicate riddle, a complicated recipe requiring astuteness and balance. However, we know that the best stories and experiences make the most complex of combinations feel simple.

Blending the findings of a comprehensive omnibus survey we conducted recently on the general public's perception of British brands, with in-depth interviews with leading marketers working in British companies and institutions, we've explored the key challenges when harnessing the power of national provenance for British brands today. We extracted the key insights into how to use and understand this asset post-Brexit. A generalised approach to Britishness in branding is a thing of the past. To create real meaning, a bespoke balance is required.

We've developed a collection of insights to help any brand understand how to enrich its reputation and appeal from a uniquely British perspective, using new codes and ingredients to its advantage.

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**NOTES ON A
SMALL ISLAND**

WHEN DID WE BECOME BRITISH?

The winding tale of the etymological beginnings of 'Britain' is as complex as our current state psyche. 'Britain' originates from the Old English word 'Breoton' which in turn comes from Latin 'Brittones' (Britons). This was superseded in Middle English (c.1150 to c.1470) by forms deriving from Old French – 'Bretaigne' from Latin 'Britannia'.

Wales was annexed into the Kingdom of England in 1536 under the Acts of Union. 'Britain' became a largely historical term until revived in the mid-17th century as the possible union of England and Scotland became a subject of political discussion. Britannia is the personification of Britain, usually depicted as a helmeted woman with a shield and trident. The figure appeared on Roman coins and was revived with the name Britannia on the coinage of Charles II (1630–85). In 1707, England and Scotland signed a treaty resulting in the unified Kingdom of Great Britain. After merging with the Kingdom of Ireland, the United Kingdom of Great Britain and Ireland was formed. Then, in 1922, the majority of Ireland voted in favour of seceding from the union, leaving behind the United Kingdom of Great Britain and Northern Ireland that we have today.

Great Britain is technically the name of the island that comprises England, Scotland, and Wales, whereas the United Kingdom is in fact the political unit that includes these three countries and Northern Ireland. 'British' is used mostly in the context of nationality and, for some (i.e. all former colonies), has strong connotations of the British Empire, which was at its height in the 1920s when it covered a quarter of the world's land mass. But in addition to the territorial, political and nationalistic implications of 'Britishness', there are also cultural definitions – art, literature, music, film, sporting pride, architectural landmarks, and of course, the royal family. These are decoded differently across class, age and religion, creating a whole range of diverse interpretations.

BRITAIN

EST 1150

BIG AND BOLD BRITANNIA, STILL

From the post-war era, right up until the 1980s, there were many state-owned, monopolistic brands, both contributing to the reputation of Britishness and deriving equity from it. It was a period of time when a brashness in interpretation was still riding high on the United Kingdom's sense of self in the world. Indeed, it is easy to forget how long and dominant the roll-call of brands that fitted into this category was: British Gas, British Steel, British Rail, British Petroleum, British Airways, British Leyland, British Telecom and the British Broadcasting Corporation. These were the proud silverware on the sideboard of the world's first industrialised nation.

Thatcher's commercial instincts may have been radical but her view of Britishness was highly traditional as was her successor's, John Major.

Many were engineering-based or utilities companies. They were, in the main, professional, solid, reassuring but uninspiring. It was often the innovative 'child' products of these steady 'parent' corporations that attracted admiration and attention: Concorde from British Airways; Mini from British Leyland; the Inter-City 125 trains from British Rail and the 'creative R&D Lab' known as BBC2 from the BBC. This sense of duality, of solidness mixed with experimentation, is itself an interesting component of the British psyche which has found expression through branding.

Margaret Thatcher's subsequent privatisation of many of these state-owned companies was revolutionary, released energy and created a new breed of 'ordinary shareholders'. Her commercial instincts may have been radical but her view of Britishness was highly traditional as was her successor's, John Major. However, her initiatives were a watershed moment which asked the British public and British brands to consider their role in a radically reshaped economy and society.

NEW LABOUR'S 90s REINVENTION

The 90s brought a wholesale attempt to re-define Britishness in the run-up to a new Millennium with the election of Tony Blair.

'Having redefined what it means to be left-wing, Tony Blair planned to do the same for Britishness', announced *The Economist* in August 1997. Blair and his team wanted to drop Thatcher's imperialist, sometimes xenophobic, view of Britishness and instead face outwards towards the world.

A report by think-tank Demos was commissioned by New Labour in 1997.¹ It describes a model of Britishness that has an anchoring centre of integrity, tradition, fair play, quality and thoughtfulness. Around this nucleus are six whirling elements: creativity, eccentricity, humour, challenge, wit and outrageousness. In successful British brands, these elements are held within the gravitational pull of the centre rather than spinning off on a wild trajectory. At the same time, a key observation from the report saw that British products were found to have a staid image amongst foreign consumers, which led firms such as BT and British Airways to play down their Britishness. Indeed, British Airways famously re-designed its livery with an eclectic range of ethnic tail-fin designs by artists from different world cultures. This was to portray BA as a global airline transporting 'citizens of the world'.

It is interesting to see what survived from this Blair era of self-consciously 'Cool Britannia'. One aspect would be Scottish and Welsh devolution, itself both a complication and enrichment of Britishness. The second is the political idea of the 'third way', whereby modern British governments no longer conform to the norms of political party brands but seek to combine social justice with economic well-being.

'Having redefined what it means to be left-wing, Tony Blair planned to do the same for Britishness'.

¹ <https://www.demos.co.uk/files/britaintm.pdf>

NEW LABOUR'S 90s REINVENTION CONTINUED

The zeitgeist of the role brands now play as a corporate pillar within our societies demands they balance profit and social value.

This stretches from Blair's cultivation of big business, previously sacrilegious for Labour, through David Cameron's championing of gay marriage, unlikely from a Tory, to Theresa May's current concerns about worker representation, business ethics and reducing inequality. This theme of placing social responsibility within the economic sphere has undoubtedly had an effect on how brands are portraying themselves in the current climate as they seek to balance profit and social value. The zeitgeist of the role brands now play as a corporate pillar within our societies demands that of them.

The third successful element of the Blair era was the Olympics. New Labour set up a national sports academy focused on sports in which Britain could win gold medals. This has paid handsome dividends in the last two Olympics and Paralympics, which led to the next staging-post for brands and Britishness. In the run-up to London 2012, many British brands re-emphasised their Britishness as the world's eyes settled on the United Kingdom. Yet it was a more eclectic, self-referential and stylish Britishness: take, for example, Stella McCartney's Olympic kit with its fresh take on our flag and iconography (the Union Jack itself has proved to be frequently ripe for re-interpretation as Alexander McQueen's frock-coat for David Bowie has also proved).

Most interesting of all was Danny Boyle's Olympics ceremony with its extraordinary, quirky celebration of our Victorian engineering and industrial heritage; the humanity of the NHS; the loving irreverence and shared humour of the Queen apparently parachuting into the stadium; and our history of achievement up to the invention of the World Wide Web. This ceremony brought alive all the six 'whirling' characteristics identified many years earlier in Demos's report on British identity without being aware of it as any kind of brief. This pointed the way towards a consistent, often intuitive, understanding of 'Brand Britain'.

BRITish?

WHIRLING ATOMS OF BRITISHNESS

The metaphorical toolbox of attributes to which brands have had access is therefore varied and vast; it's evident that many versions of 'Britishness' can fit such a malleable mould. However, we wanted, post-Brexit, to pose the question: what does Britishness mean for brands now? Do any elements of the Demos model still ring true? Are people loyal to brands because they are British or because they are good at what they do and incidentally British? Will 'Britishness' for brands in a post-referendum world need to change course, and what is the role of brands in shaping future opinions and notions?

To answer these questions, we combined research and data from a range of sources to understand the landscape and ascertain the successful, reoccurring themes. From this we propose a new way through which a brand can utilise its 'Britishness' in a new environment.

ATTRIBUTES TOOLBOX



As visualised by The Partners



**WHAT
CONSUMERS
THINK**

THE BATTLE FOR LOVE AND ATTENTION

We posed a series of questions to 1,000 demographically representative UK adults in a survey conducted by Lightspeed GMI (Kantar). Interpreting the EU Referendum as a wake-up call not only for British politics but also for the way brands are interpreted by their audiences in the UK, we asked a series of questions at this watershed moment in our national dialogue to ascertain the state of Britishness today and its efficacy as a tool for brands.

We started by looking at which British brands people most admired and respected. Providing a diverse list of 30 brands across a variety of sectors, we asked all of the respondents to rank their five favourites. The brands that came out consistently on top were BBC, Marks & Spencer, Cadbury's, Boots, Post Office, John Lewis, Virgin, Dyson, Tesco, and ITV.

The BBC came way ahead of any other brand in terms of admiration, with 46.1% of people choosing it amongst their top five. This is a ringing endorsement of both the depth of the BBC's public service values and its breadth of appeal: a rare combination in the landscape. Indeed, you could describe the BBC as the most flexible monolithic brand in the world. Its appeal among 18-24 year olds was also high, with 44% putting it in their top five. This itself was interesting, because it goes some way towards dispelling the myth that 'digital natives' do not feel as affectionate towards a brand traditionally associated with its onscreen broadcast output. The BBC is a brand that is built on heritage but still looks resolutely to the future and pushes itself to the cutting edge of technological advances. Its adoption of iPlayer before the other big organisations in the industry is testament to that forward-thinking.

MOST ADMIRED BRITISH BRANDS			
1		46.1%	
2	 <small>EST. 1884</small>	33.3%	
3		32.0%	
4		32.0%	
5		25.9%	
6		23.7%	
7		23.1%	
8		21.2%	
9		19.3%	
10		19.0%	

% of people including this brand within their top five

THE BATTLE FOR LOVE AND ATTENTION CONTINUED

46.1%

**of respondents chose
the BBC as their most
admired and respected
British brand**

This balance – as well as an appreciation of the range and quality of services and programmes offered by the BBC – allows it to take the top spot.

High street retailers featured heavily amongst the top five rankings, as one might expect due to their everyday visibility. M&S led the field, ranking second overall with 33.3% of respondents. There was an incredibly strong female bias that increased significantly among those aged 55+. However, when we asked respondents whether they believe that the brand is capable of uniting the nation, only 7.2% of people gave a positive response.

Cadbury's, which came third, stands alone in terms of an FMCG company that gained such widespread admiration. The brand also scores well on uniting the nation. It is the 'standard received taste' of British chocolate. This supports another key finding from the survey: that foreign ownership, however initially controversial, often stabilises or even enhances the reputation and success of British brands. Cadbury's was purchased by Mondelez, formerly Kraft Foods, in 2010 and it was bitterly resented at the time as the sale of a 'national treasure'. Yet it seems to be thriving in terms of public reputation.

Boots was fourth and the Post Office fifth. Boots was chosen by 32% of people to be in their top five – its appeal did not lean towards a specific age group but it was particularly female-inclined. Despite the fact that it has seen huge declines in its core postal and government services, the Post Office is placed fifth in the list of most respected brands. Bricks and mortar, local presence and longevity perhaps count for a lot.

Often cited as the epitome of customer service, John Lewis did not feature in the top five, coming in at sixth with

23.7%. Dyson, committed to invention and improvement, was the only manufacturing company to score well, achieving 21.2%. In the food retail sector, Tesco seems to have overcome its last two years of turmoil, securing ninth spot with 19.3% of the group's selections (versus 14.8% for Waitrose and 13.3% for Sainsbury's).

Trailing behind in the rankings are brands such as Mini, WH Smith, Innocent, BP, GSK, Prudential, Burberry, and AstraZeneca. What is surprising on a first examination is that many of the most internationally successful, globally high-profile British brands do not rank highly in the British public's mind. Offering its own highly creative blend of tradition and eclecticism, Burberry attempted to reinvent the retail and luxury sectors with its instant shopping and digital drive, and has seen enormous success in markets such as China and the US. Yet the brand only featured in 3% of people's selections. Burberry targets a niche audience for expensive, luxury products so perhaps tangible popularity across the spectrum is unrealistic. Burberry's 'distinctly British attitude' is also one of a performative nature – it makes use of British symbols but predominantly displays these to the world; therefore, its type of Britishness is packaged for different eyes.

GlaxoSmithKline and AstraZeneca are amongst the worst-performing brands on our prompted list of 30 British companies, with only 3.7% and 1.8% of the public respectively putting them in their top five. Possibly due to being associated with 'grudge purchases', pharmaceutical companies, it seems, would need to compellingly communicate their corporate purpose and story and become more obviously patient-centric to win greater public respect. WH Smith is a brand that's changed very little in how it looks and sounds in recent years; results would indicate that this staidness has been noticed by consumers.

21.2%

**Committed to invention
and improvement,
Dyson was the
only manufacturing
company to score well**

THAT STRANGE THING CALLED BRITISHNESS

25%

of the survey selected Britishness and British heritage as the most important aspect of a brand

We then asked all respondents what qualities were most important to them in the brands that they love. There's something ironic in the results from brands typically associated with Britishness because, for all the espousing of British heritage, excellence and qualities, consumers don't actually rank Britishness very highly when thinking about what matters most to them. More important to consumers are aspects such as the quality of products; the staff and customer service experience; and the skills, craftsmanship and expertise of a brand. Coming in at the bottom of the list are a brand's culture and values (4th); its Britishness and British heritage (5th); and finally, its personality and voice (6th). 25% of the survey selected Britishness and British heritage as the most important aspect of a brand, compared to 54.3% putting the quality of products in top position, and 35.9% doing the same for staff and customer service.

The importance of these rational, intrinsic qualities suggests that many British consumers are not prone to overt patriotism or sentiment swaying their brand choices. In a globalised trading environment it is the fundamental product quality and craftsmanship that matters more than provenance. This may explain why Dyson was the only British manufacturing company to score well in the most admired brands category, with 21.2 % putting it in their top five. The quality and innovative prowess of the product is the most consistently communicated aspect from the organisation.

Equally, culture and values, despite the growing concerns with social purpose and environmental issues, are lower in the pecking order than one might expect, although still ranked above Britishness in terms of influencing loyalty. The importance of culture and values rises with age, disproving the notion that millennials are the only group concerned with ethics.

ATTRIBUTE MOST IMPORTANT IN A BRAND

1st

The quality of a brand's products

54.3%

2nd

A brand's staff and customer service

35.9%

3rd

A brand's skills, craftsmanship and expertise

31.6%

4th

A brand's culture and values

29.2%

5th

A brand's Britishness and British Heritage

25.0%

6th

A brand's personality and tone of voice in communication

21.5%

% putting this factor as the most important in a purchasing decision

A VERY PECULIAR PARADOX

7/10

people aren't concerned about foreign companies taking over British brands

When it comes to the way Brits believe British brands should market themselves post-Brexit, there are strongly divided views. A significant 41.8% believe that brands should emphasise their Britishness more to appeal to a wider range of global consumers. They clearly feel that a British identity post-Brexit is even more important and not a tarnished asset. This view is especially prevalent amongst those aged 55+ and somewhat more prevalent amongst men, a profile which corresponds with many Brexit voters.

Four out of 10 people feel that Brexit should make no difference to how British companies sell themselves. Two in 10, however, think that British companies should emphasise their heritage less and highlight their other qualities – product quality, expertise – more. Significantly, this doubles to four out of 10 amongst 16-19 year olds. It would be fair to assume that many of these respondents are 'Remainers' worried about Brexit casting Britishness as a quality, and British companies by association, as isolationist. Overall however, there seems to be a strange tension between the way in which Britishness is valued as a standalone attribute versus how a significant number of respondents feel that it should be utilised in organisations' branding.

JWT Europe, one of our sister WPP companies, did a survey of 1,000 people on the Friday after the referendum and found that three out of four people believed that the 'essence' of Britain would now change, with many saying this would be for the worse. Indeed, 69% of those polled said that the referendum would have a negative impact on brands. It seems that in the two months between their survey and ours – conducted in the wake of inertia and lack of clarity over what 'Brexit' actually looks like – the number of people who feel that Brexit will have a negative impact on British brands has diminished significantly.

It's likely that macro-trends in politics and world economies are slowly reframing the discourse around national identities and provenance.

In line with exploring the importance of where a brand 'comes from' or its 'birthplace', we asked respondents about foreign takeovers of British brands. As is commonplace in the globalised markets where brands operate, more and more British brands have been taken over by international companies – Walmart bought Asda, Walgreens purchased Boots, BMW owns Mini and Rolls Royce. Does this change our opinions of them?

Just under a quarter of the population resents foreign takeovers and this resentment rises sharply over the age of 45. However, a large proportion – seven out of 10 people – aren't concerned about foreign companies taking over British brands: 31.7% are mildly upset but carry on purchasing the brand; a further 27.8% say it doesn't make any difference whatsoever and a final 11.8% don't mind as long as the character of the brand remains the same. Very few – one in 20 – people believe that foreign owners have made British brands better. Overall this indicates a general sense of ambivalence towards takeovers.

What's fascinating about these results is that even though Britishness as a standalone attribute ranks low on what is important to consumers, a sizeable number of respondents indicate that Brexit requires greater emphasis of that particular quality. It seems paradoxical to value it so little as an attribute, but to indicate that its significance going forward is more important than ever.

41.8%

believe that brands should emphasise their Britishness more to appeal to a wider range of global consumers

A TANGLED WEB

The research serves to imply that, more than ever, there's a very intricate concoction that defines Britishness in a more nuanced and modern way, one which requires reflection and unpicking.

Obviously, it would be far too simplistic to assume that a one-size-fits-all model is appropriate. There are a series of interesting paradoxes in the survey which sit below the surface of the responses. For example, if Britishness as an attribute ranks so low, why do nearly 42% of respondents feel that, post-Brexit, British brands should emphasise their provenance more? What do the chosen top 10 admired brands tell us about the tastes and most admired characteristics of the British populous?

One could argue that they are all in some way or another embodying elements of the Demos model of 1997, today, in 2017. This in itself suggests that although it feels like there's an intangibility to the definition of what Britishness actually is, there are underpinning codes which are tried and tested.

Combine these with a world that has socially and technologically revolutionised, however, and you inject a whole plethora of sweeping transformative trends into an already constantly mutating definition. The research serves to imply that, more than ever, there's a very intricate concoction that defines Britishness in a more nuanced and modern way, one which requires reflection and unpicking. It requires a new approach which embraces contradiction.

Sophistication in audience and advancement in technology make complex brand identities more possible and appealing. Brands shouldn't shy away. There's never been a better time to embrace this peculiar challenge.

GAERT BTIARIN



**HOW TO USE
BRITISHNESS**

HOW TO USE BRITISHNESS

We know that Britishness is a term bandied around in a wide range of contexts. We also know that its definition has been in a constant state of flux and change since the post-war period. As a nation, our collective experiences continually shape our values and behaviours. Defining ‘Britishness’, with its many historical iterations and shifting connotations, has always been tricky.

We wanted to take a longer-term, more holistic view of trends within provenance, Britishness, and the use of both as tools for brands in the future.

Brands have often used this ever-shifting composite to talk to us in ways we understand, encouraging us to see ourselves reflected in their personalities and products. However, as it's become more difficult to measure Britishness and whether its impact on communications is fragmenting or unifying, so its usage has diminished or been downplayed. The quandary it poses to brands, who are uncertain about audience's receptiveness, means that the potential potency of Britishness as an attribute has become diluted.

Brexit threw this predicament into a harsh, naked light, framed almost poetically by the rhetoric and semantics surrounding the 48/52 divide and all the implications of this. There have been countless editorials, rankings, interviews and predictions on the effect it may or may not have on the perceptions of Britain at home and abroad; its potential and real consequences for the economy;

the value of its brands in a new climate; and its effects on consumers, our political parties, our families and ourselves. We've acknowledged these discussions. But we wanted to take a longer-term, more holistic view of trends within provenance, Britishness, and the use of both as tools for brands in the future.

Using the omnibus results as stimulus, we interviewed a set of experts from established and successful British brands to facilitate discussion and insight around where Britishness goes from here post-referendum. We used the findings to inform our perspective. Their insights help to dissect and explore the results further.

INTERVIEWEES

Karen Cardy
Marketing Director,
London Symphony
Orchestra, St Luke's
Centre Director

Elly Cockcroft
Head of Marketing,
Brand and Digital,
MCC (Marylebone
Cricket Club, Lord's)

Callum Hunter
Corporate Sales Manager,
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Diana Kay
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Louise Kyme
Former Senior Brand
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John Pearce
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Lynn Scrivener
Head of Marketing,
RWH Travel Ltd.

Vernon Soare
COO, ICAEW

Jack Wallace
Head of Brand Strategy,
Argos

AMBIVALENCE IS NOT DISASSOCIATION

If you have to choose, quality will always win in a consumer's eyes over Britishness. However, some British brands have a type of quality in their offer that's inseparable from the way many of us view our national character. For example, we view John Lewis as the epitome of quality, trust and service but would its offer feel quite so true if it weren't backed up by the inherent sense of Britishness?

**Louise Kyme,
BHF**

On first reading, the omnibus findings would indicate that an underlying thread tying together the responses is a lack of consistency over what 'Britishness' means to Britons as groups and individuals. It seems to suggest that the people least likely to buy into Britishness are the British themselves. Indeed, overt Britishness seems to be playing a less and less important role in the lives and identities of the British themselves, especially in younger age groups. It is therefore natural that its position on a hierarchical list is low in terms of the way in which people define their relationships with the brands they choose.

However, it would be a surface-level mistake for brands to listen wholeheartedly to this because, as you'd expect, it's a bit more complex than that. People still want to feel a collective sense of belonging, they still need a reference point which links them to a wider, larger narrative. There's an individualism in brand choice, but the values and attributes associated with Britishness still contribute to an experience that tangentially borrows from associations with the national character. Some components of this run deep – creativity, eccentricity, wit, tradition and heritage – to name a few. What's interesting is that we come to associate many different facets with nationality, but these facets work both within and outside a British frame. So more than ever, people no longer care about 'Britishness' per se, but are more concerned with the attributes *associated* with it, the core components

underpinning it. It needn't display a Union Jack tail-fin or have a date or city of establishment to succeed, but in fact have qualities associated with a more abstract understanding of the collective national psyche. Quality, service and craftsmanship are important – separate them from the attribute of Britishness and they trump it. But what's evident is that in the case of some of the most loved brands, those attributes of quality, service and craftsmanship are *intrinsically tied* to Britishness in its expression.

Many of these attributes are linked to the fundamentals identified in the Demos report 20 years ago. It's how they are deployed that's changed, which is only natural given the changed nature of the world and brand communications in general.

British people have a stronger allegiance to Britain than we're willing to admit.

**Elly Cockcroft,
MCC**

When going global, there most likely isn't a lot to be gained by simply wrapping your products in a Union Jack. Over-identifying with national identity in such a volatile world may actually be detrimental. Nothing truly successfully British actually relies that heavily on overt Britishness anyway.

**Callum Hunter,
Collins Debden Ltd.**

A POST-NATIONAL SOCIETY?

When you say Italy or France to someone, it conjures up a very clear identity. It's the same for cars in Germany. In Britain, it's hard to pin that set of identity cues together. London and Scotland have their own incredibly strong attributes; these are perhaps stronger than those associated with Britain itself.

**Callum Hunter,
Collins Debden Ltd.**

Brands like Land Rover, Dyson, Rolls Royce – they don't explicitly shout about their Britishness, but it's implicit in everything they do.

**Lynn Scrivener,
RWH Travel Ltd.**

The nature of national provenance in branding has been changing for some time, regardless of recent events within the UK. In a globalised world where exposure to such a vast array of international products, trends and tastes creates the semblance – real and perceived – of homogeneity, brand authenticity for many consumers is increasingly tied to more defined locality. In reaction to this, many brands are choosing to express or highlight more regional or hyper-local provenance. Others choose to define themselves globally, seeing the benefits in attracting consumer segments across borders.

Mixing global and local is a key theme emerging in the marketplace today. These have been two opposites of a complicated balance leading to a reappraisal of the 'one-nation' approach. Provenance as a brand attribute has adapted and continues to adapt as a reaction. Consumers want experiences and brands that fit their perceived selves, and this is no longer linked to nationality or nationalistic leanings. Many crave a more local authenticity because it acts as an antidote to globalisation's implicit 'one-size-fits-all' approach.

However, some within this audience will continue to identify with global brands because they speak to consumer types who see themselves as global citizens. Apple is a global brand that many of us identify with because its design codes and values resonate with modern day living. By contrast, Yorkshire Tea and Hiut Denim play on their respective localism, giving their consumers a purchase steeped in a local story. Mulberry plays on its localism of being based in Somerset and all that the idyllic qualities of the English countryside conjure emotionally in the minds of consumers. This interchangeability between hyper-local and global identification is a juxtaposition balanced more naturally by a younger demographic; its effect is unfavourable for brands emphasising generic patriotism.

100%
BRITISH BRAND

A POST-NATIONAL SOCIETY? CONTINUED

Provenance is of course shifting and people in different places will of course view it differently, though Britishness is still important. It's simply that, as a concept, it's less explained and less understood in explicit terms.

**John Pearce,
Made in Britain**

The splintering of consumers represents a sand dune of complexity, shifting a once distinct, easily-minable set of values and attributes and their application. Do we live in a post-national identity society? It would be churlish to call it so at the moment, but it's at least one where it's increasingly difficult for brands to identify or communicate with a whole nation. Technology and globalisation mean that we all have complex, fluid consumer profiles, and national provenance as a tool is no longer the same tool it once was for British brands.

Ultimately though, consumers are still using and purchasing across the spectrum, which includes those harnessing British attributes. Brands need to bridge this local/global paradigm to decide how they define and project their provenance on the spectrum in a way that feels authentic to them. National provenance still has a role in this.

THE BREXIT CONUNDRUM

When considering the result of the EU referendum and its implications, it's important to consider the relationship between Brand Britain and British brands. If we're to believe that brands take their communication cues from the attributes associated with the national composite, then the vote exposes several fault lines which need to be acknowledged and considered.

However, if you view the result of the vote as a tense, paradoxical struggle between two key themes of attributes – that of tradition and heritage, which represent solidity and longevity, and that of eccentricity and individualism, which represent rebellion and outrageousness – it's then that you begin to understand some of the challenges that brands face within this context are challenges that have always existed. That's because they exist deep within the nation's understanding of itself. Understatement and insecurity butt against a sense of exceptionalism, conformity grinds against eccentricity, politeness against wit and humour. The expectation that, across a wide range of communications platforms, brands should already be conducting this balancing act has been established. The reality however is that because it's difficult to implement, it's often pushed to the side.

What the referendum vote has done is bring these issues, these tensions that have previously hovered and been managed just under the surface, to the fore. It splits the nation across a whole series of fault lines, from age and social class to urban, rural and intra-national. It spans all traditional political denominations. It highlights divisions in a way which hasn't been seen before. Basic segmentation

Post-Brexit, we will have to rediscover our identity and define what it actually means. We need to establish who we are, without it appearing old-fashioned or imperialistic. To do this we need to embrace creativity and new solutions. Perhaps a way of expressing it is 'understated excellence' without an arrogance that makes us unapproachable.
**Vernon Soare,
ICAEW**

THE BREXIT CONUNDRUM CONTINUED

There's no getting away from the fact that heritage offers a huge amount of leverage when it comes to being a British brand overseas.

**Diana Kay,
McLaren**

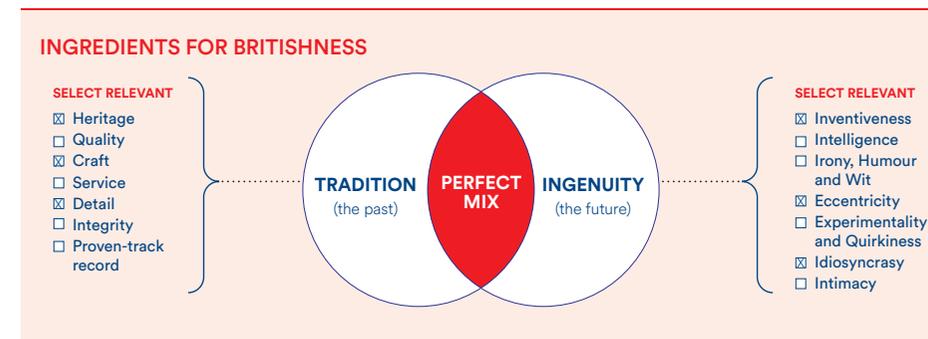
wasn't fit for purpose long before the referendum, but what Brexit has prompted is an irreversible validation that consumers have fragmented and that brands can no longer lazily define who they are through a simplistic national lens. Indeed, more than four years ago, the BBC conducted a survey that suggests we now live in a society with seven social classes, complicating the more traditional, widely-held views on segmentation.² All of this serves to reveal a fragmented and more self-aware audience. British provenance as a tool has therefore become a trickier beast to manage, a dangerous path of potential potholes and missteps.

Brexit may make national provenance less important to some consumer segments, but as a tool it will be amplified for others. Brands channelling 'Britishness' may hijack characteristics and marry these with 'Englishness' – this approach is more populist, Nationalistic with a capital 'N', and speaks to a segment with stronger tendencies to patriotism. Some brands may embrace this to connect with their segment. Others, who may have previously relied on the moniker 'Best of British', will recoil from its new connotations, searching instead to maintain familiarity in a subtler way, either through associations with the local or the global, or through brands that promote heavier shades of the attributes they relate to most.

Commonly used attributes, employed overtly or not, are now viewed through a more divisive national lens. In short, it's harder to appeal to the widest audience possible on the ticket of Britishness, because its definition is so divided. However, brands do have the flexibility to play within the parameters of these contradictions.

² <http://www.bbc.co.uk/news/uk-22007058>

THE CENTRAL TENSION AND TOOLS TO IMPLEMENT



It's not practical or right to suggest a blueprint for brands and marketers. There is no 'one-size-fits-all' approach. It's more about finding the core truth at the heart of your brand and creating the right mix of platforms that tie your brand ambitions to your business objectives.

It doesn't help that so much of what we think defines Britishness is interchangeable between audiences and is assimilated from many different sources. Nevertheless, there are two groupings of British attributes that we believe can be employed to create brand personality and communications, balancing the fundamental pillars of Britishness. They can be seen as a balance of the dualism at the heart of the national psyche, within which is a subset of tools and styles that brands can draw from.

By creating a balance of ingenuity and tradition, the progressive and the conservative, brands can attempt to redefine Britishness and take control of the national narrative in a way which is unique to their product or service.

This change is driven by social imperative. Whilst consumers are ready to embrace the new and strange – facilitated by technology and diversified personal expression – there's also a desire to root these experiences in the familiar and safe. It's a tale as old as time, but one which feels even more pervasive in a fast-paced, uncertain world.

For a brand such as ours, the importance of heritage cannot be underestimated. However, there are also connotations associated with heritage which can be viewed negatively by a large group of consumers today. Being polished without being elitist, harmonising our steeped history and strong British tradition with modern-style customer service helps us to create a balance.

**Elly Cockcroft,
MCC**

THE CENTRAL TENSION AND TOOLS TO IMPLEMENT CONTINUED

Britishness is important because it represents quality, heritage, craftsmanship – these don't need to be old-fashioned but they do inspire trustworthiness.

Lynn Scrivener,
RWH Travel Ltd.

The values of pride, diversity and openness matter more than legacy. Brexit doesn't change that, but we do need to keep championing their importance.

John Pearce,
Made in Britain

It can clearly be seen in the progression in certain social arenas and the conservatism and frustration increasingly surrounding globalisation and neoliberalism. It's out of sync symbiosis – messy, complex and often contradictory. It's a widely-held acknowledgement that brands need to feel more individualistic to stand out, and more fluid in their various platforms and modes of delivery. However, they also operate within this wider context.

And whilst tradition – a key attribute within this wider group – is by no means the be-all and end-all to a brand's DNA, what it does offer is a whole range of possibilities. It can demonstrate a leadership and expertise in the sector. It can underline promises around trust and integrity. We respect heritage and longevity because it fits with the closely-held British notion that sacrifice and hard work results in reward. It also provides the opportunity to leverage the 'authenticity' of craftsmanship, which can be weaved into brand stories.

From a brand image perspective, heritage also offers a whole series of prompts. These are the brands who have overtly tied themselves to the British moniker or, rather, have overtly tied themselves to the British tag. This, however, doesn't necessarily directly influence the style of communications used by these brands in a uniform manner. Some do this by name, others through their visual identity. British Gas, British Film Institute, British Fashion Council, Royal Mail, British Airways and Tesco are but a few examples, using the blue, red and white of the Union Jack. Inclusion of royal warrants, crests or paraphernalia, or the identifier 'Est.' in a brand's logo aim to demonstrate a brand's pride and assertion of its British longevity and heritage. Twinings, Fortnum & Mason, Burberry and M&S are brands that use this technique. The royal warrant in this respect provides a sense of place and solidity in a time of rapid, uncertain change. It can augment and assure positive associations by aligning with a respected institution and its own set of very British associations.

It would be illogical to say that these brands demonstrate every technique that a brand can employ when looking to exude overt Britishness. However, what links these brands is a reliance on heritage to convey a sense of commitment, an associated proven track record. This in itself is intended to denote a sense of integrity, longevity and level of service within their offers. In terms of proffering experience, this is arguably a very 'British' way of establishing credibility, providing markers of quality, expertise and longevity. It relies on being squarely viewed through a national prism.

One could argue that to solely use attributes associated with tradition no longer creates the resonance that it used to. The same can be said of the simplistic use of national colours that appears patriotic, but no longer has the automatic, discernible link to quality and service it once readily signalled. Tradition therefore goes some way to creating validation because it reassures. It creates a grounding, even when it's expressed simply through established visual cues. However, as a standalone quality, it no longer has the power to play the leading role, as it isn't representative of a future trajectory. Reliance on it can feel like arrogance on a number of levels.

If we reflect back on the dualistic aspects of Britishness however, we know that much can be done to soften and appropriate tradition and established codes in service. Connection to quality and craft, which are underpinning attributes of heritage, can be explored in a fresh manner, leading to new ways of expression for British brands' stories. Excellence is as much about the future as it is about the past. There are the brands that tap into a notion of Britishness that places importance on ingenuity more than tradition. This sense of eccentricity, of non-conformism, is an attribute that's been central within the national psyche for a long time.

Britain is like a tree with deep roots connected to its sense of tradition, yet using its branches to display new ideas. It's this balance of old and new, giving heritage a modern twist, that we do so well.

Karen Cardy,
LSO

To enable the successful use of 'Britishness' it needs heritage but it doesn't just rely on that – it creates a modern interpretation of that past in its design and approach.

Jack Wallace,
Argos

THE CENTRAL TENSION AND TOOLS TO IMPLEMENT CONTINUED

BRANDS USING TRADITION AND INGENUITY WITH EXCELLENCE

first direct

First Direct takes 'the unexpected' approach to banking. In doing so, the brand positions itself as a tonic to the staid way in which most banks in the same space behave. Its handle on relatable communication feels human, directly contrasting with some of the bigger players' attempts to seem empathetic.

PG tips

'Ever since the 1930s, the people of Britain have been sitting down for a chat over a delicious cup of PG tips. That's a long time and a lot of tea...' 'Everything about PG tips, from the opener to the tagline 'Keep it tea' to the 'royal warrant' that shows Monkey snuggled up in an armchair with a cup of tea', has fun with traditional aspects of British life. It's witty and self-referential.

Paul Smith

'Classic with a twist': Paul Smith is known for its idiosyncratic take on traditional British styling. His designs honour the hierarchy of the tailoring world, yet are subversive and playful in the details. It's this nod to the past whilst creating something subversive which gives Paul Smith its quirky quality

Royal Mail

Royal Mail conveys a deep sense of responsibility: 'We seek to be an integral, valued and trusted part of every community where we operate'. The brand speaks of its commitment to sustainability as an 'imperative' and points to the fact that it has been 'serving the country' for 500 years.

EST. 1887
SMYTHSON
OF BOND STREET

Smythson is the perfect example of a brand that effectively uses heritage and tradition attributes. Three royal warrants work in parallel with a 19th century date of establishment and the hyper-local provenance of Bond Street, a byword for sophistication and elegance. A tripartite of solid, traditional characteristics.

FORTNUM & MASON
EST 1707

Fortnum & Mason emphasises that it's been in the business of giving customers 'a sense of pleasure' for 'over 300 years'. Like Smythson, Fortnum & Mason also uses the royal warrant as a signifier of quality.

Rebelliousness, wit, or a mixture of the two can play a strong role in creating brands that are self-aware and embrace individualism. They often acknowledge visual cues of the nation in their visual identity, yet routinely it's in paradox with the unconventionality of the offer: in doing so, it injects autonomy, difference and coolness into a brand. With Brexit, this will become even more pertinent. A bewildering result to many around Europe and the world, the referendum result confirms the inscrutability and enigmatic nature of the British. We shouldn't underestimate its effect. There's potential for it to damage associated British attributes to a market of over 500 million European consumers.

Whilst this view is based on assumptions, not fact, it does serve to remind brands in the UK how hard they may need to work to present themselves in a positive light to foreign consumers. They should begin by rationalising the dualism and the conflicting forces of change and continuity in a way that balances an internally-felt exceptionalism with an empathic and self-aware humility for the rest of the world. It needs to be packaged to make sure it maintains its attractiveness, in a way that actively disproves any insidious downgrading. Ingenuity will be the key to achieving this across all markets, both at home or abroad. Any use of wit, irony and humour needs to feel more open than insular. This may be a knowing self-parody, a wry nod to the situation. We need to be inventive, not inward-looking.

As a societal and economic trajectory and imperative, innovation is the driving life-force of the global economy. Therefore, for brands, its importance is paramount. Tradition is solid, revered and often preferential, but ingenuity is a necessity. Thus, whilst tradition forms a solid component in a brand's platform, it's the ingenuity which brands should be mastering and communicating more effectively. It's this which will continue to project them forward, keeping them necessary and front of mind for consumers.



CONCLUSION

CONCLUSION

What to do with this crisis of identity? Firstly, let's try to categorise it in different terms. Think of it instead as a crisis of confidence which has led to a weakness of intent. Difficulties in identifying sentiment towards Britishness shouldn't dissuade brands from using it in their communications. Shying away from the challenge means you can't reap the rewards.

We're a nation that defines itself through constant reinvention underlined by aspects of continuity. British brands can lead the way in harnessing complex, multi-faceted personalities.

We're a nation that defines itself through constant reinvention underlined by aspects of continuity. British brands can lead the way in harnessing complex, multi-faceted personalities. Consumers' notions of heritage are comprised of a sense of solidity, saturated with reinforcing stories and traditions. But it's when they're combined and modernised with fresh themes and attitudes that continuity is achieved. That's when brands can resonate with new audiences while continuing to engage with the existing base.

The way this is applied, using intelligence and creativity, is what creates the unique mixture that British brands can offer a UK and global consumer. It's a powerful way to resonate with audiences, who want to curate their lifestyles with brands selected as a way of expressing informed personal choice, but with the safeness of proven market validation. These tensions allow for freedom in how brands communicate with different audiences on different platforms.

It's no accident that those brands voted in the top 10 are exhibiting this balance, from the quirkiness of Cadbury's TV advertising, to the individuality of Virgin's communications, both of which are implicitly underpinned by characteristics associated with national character. Arguably the love of the BBC – aside from its status as a national institution – relates to the extremely delicate and well-honed balance it strikes between the values for which it has always stood versus the pioneering way in which it embraces the cutting edge. The digital era has only further cemented its ability to maintain a monolithic brand that feels truly individual to the user: the 'your BBC' message is reinforced through the ability to personalise content online and through BBC apps. The BBC represents the complex balance of regressive and progressive attributes to its core. We would strongly argue that this is a key component in the overwhelmingly positive result for the brand in the survey.

Brexit has provided a moment for reflection on what Britishness represents. It also provides a choice, a fork in the road where brands can continue to assimilate in a global order of homogeneity, or can choose to refamiliarise themselves with the ingredients that make Britishness a potent force. We believe that now, more than ever, it's time for British brands to reclaim their Britishness. It's in the interests of brands to build on and develop the positive associations for a new era.

*Provenance matters.
Provenance attracts.
Provenance sells.
Use it.*

We believe that now, more than ever, it's time for British brands to reclaim their Britishness.



NOTES

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