



WE

Brands
in ***Motion***

U.K. | 2018

A country in motion

- Brexit has caused economic upheaval and uncertainty, and the Brands in Motion data proves this out
- The U.K. is the only country where average emotional and rational responses went down in 2018—an indicator of pessimism
- For brands, this is both a challenge and an opportunity
 - U.K. consumers' need for brands to balance purpose and functionality and to take a stand on important issues remains high



Consumer expectations

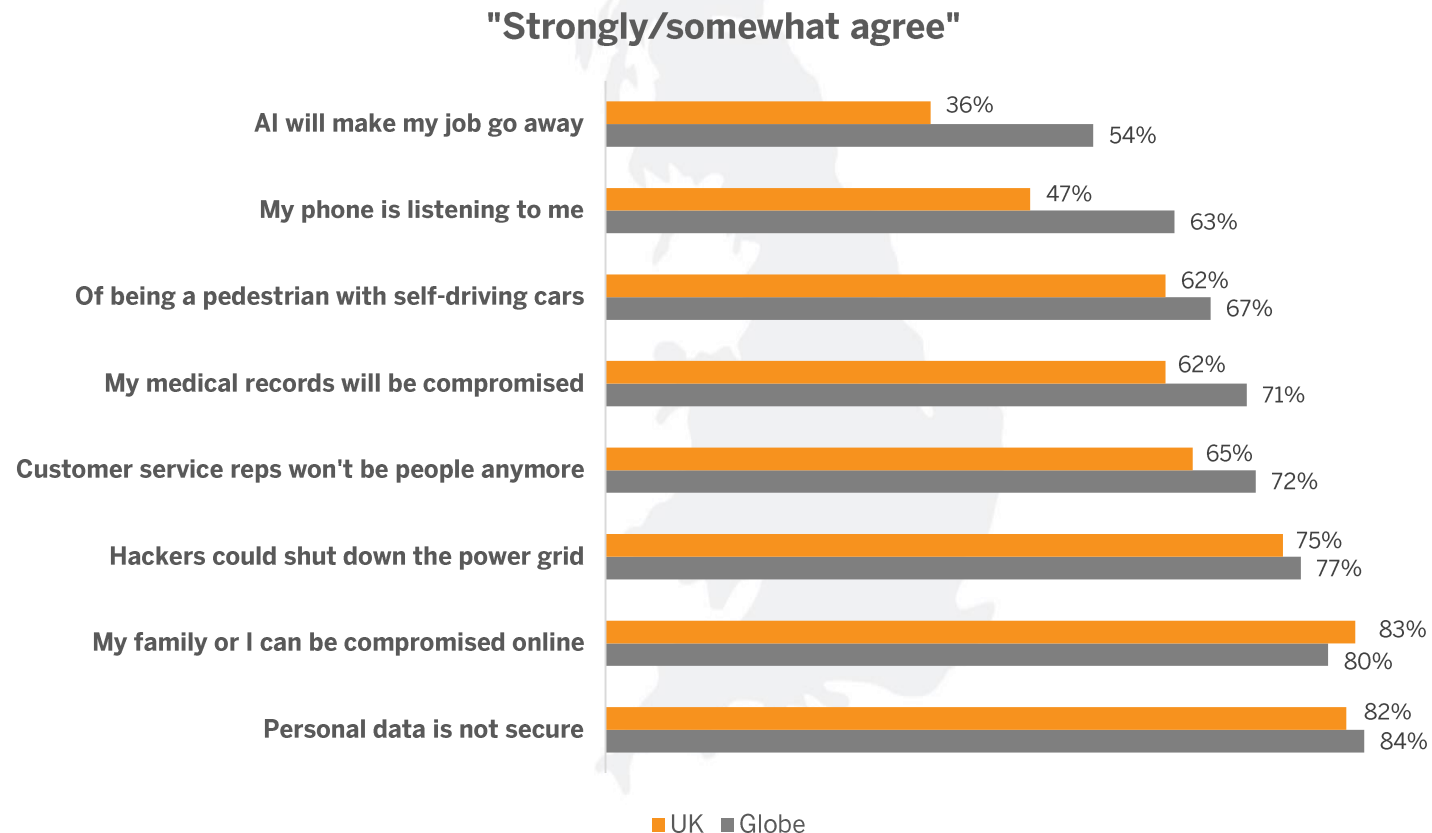
U.K. consumers are significantly more pessimistic in their expectations around technology than global consumers. We asked “over the next few years, to what extent do you think technology will allow companies and their products/services to...?”



Respondents were able to choose “Absolutely,” “Maybe,” or “Not at all”.

Fear of technology

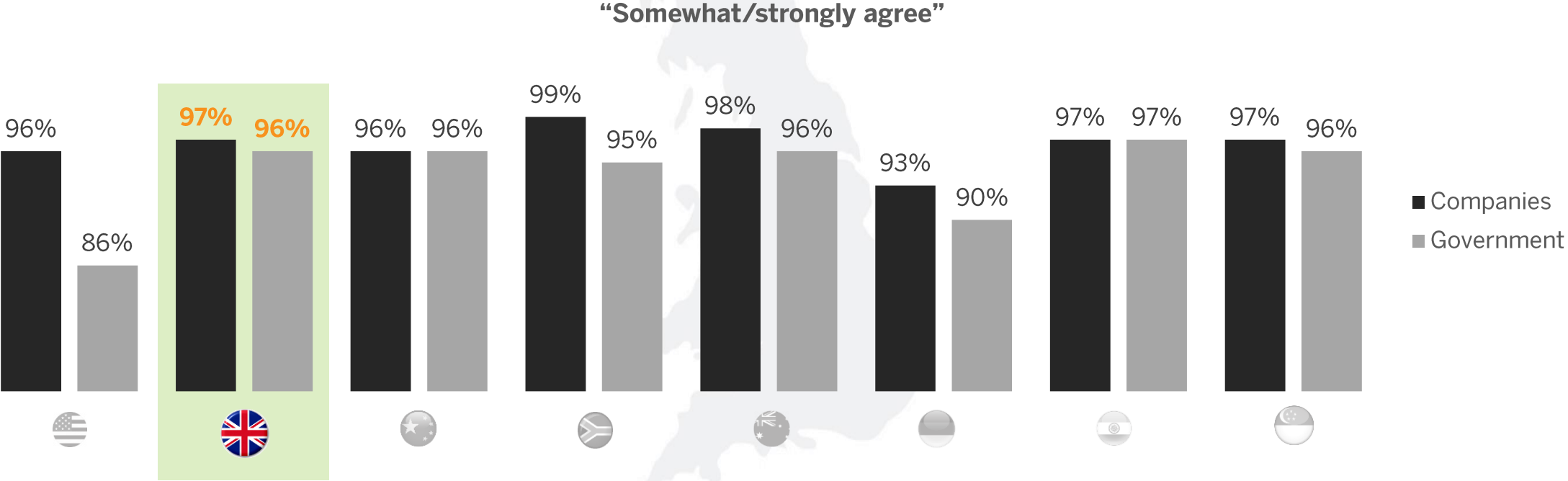
While expectations around innovative tech are low in the U.K., consumers' fears tend to be close to the global average.



Respondents were able to "Strongly agree", "Somewhat agree", "Strongly disagree" or "Somewhat disagree".

Ethics, who is responsible?

We asked to what extent respondents agree that companies have a responsibility to use technology ethically, and to what extent the government has a responsibility to ensure companies use technology ethically.





2017 Realities: Truer Than Ever

REALITY #1

Stability is an element of motion

REALITY #2

Cutting-edge is transcendent

REALITY #3

Good product, good purpose

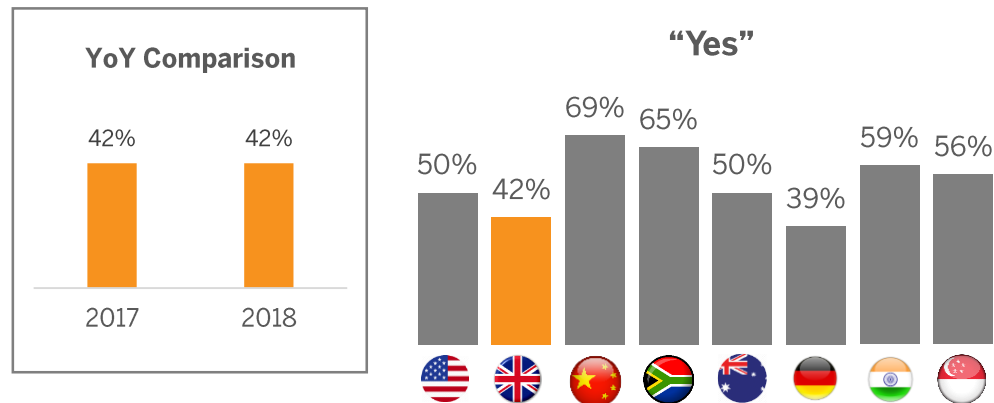
REALITY #4

Love you today, shame you tomorrow

Reality 1: Stability is an element of motion

Can brands provide stability?

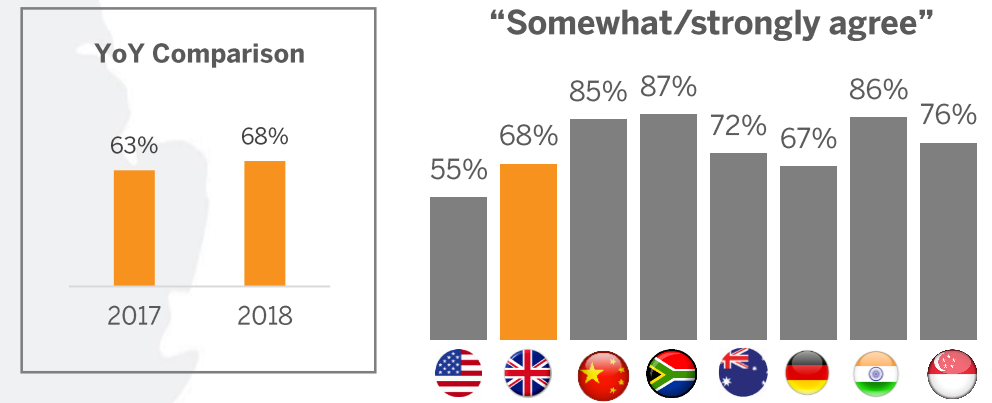
We asked “in a climate of uncertainty, do brands/businesses have the capability to provide stability?”



42% of respondents believe brands can.

Should brands take a stand?

We asked “How much do you agree with the statement...? “I expect brands to take a stand on important issues.”











68% of respondents have an expectation.

(agree or somewhat agree)

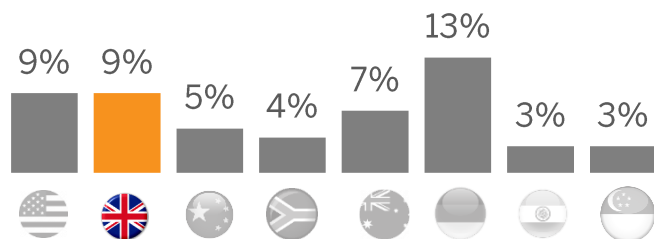
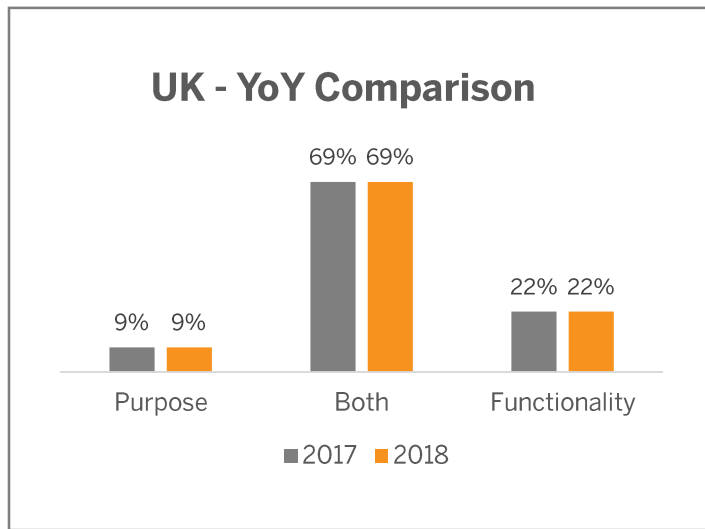
Reality 2: Cutting-edge is transcendent

Being viewed as cutting edge, whether enabled by technology or inspired by it, leads to positive brand outcomes in areas that transcend product.

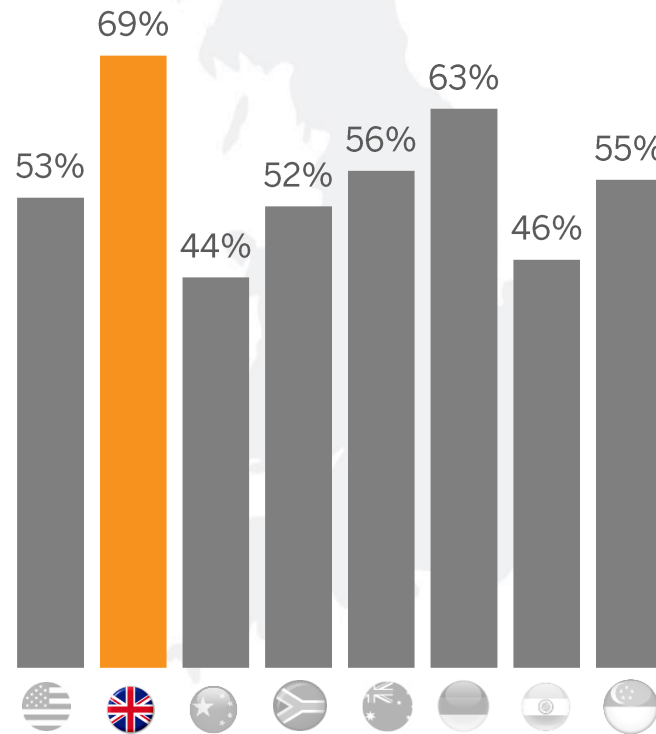
How they correlate with innovation			
	Common good OR Does harm	It's a pleasure OR Completely miserable	Love OR Hate
	0.63	0.61	0.67
	0.59	0.57	0.61
	0.65	0.69	0.69
	0.52	0.61	0.62
	0.63	0.64	0.68
	0.52	0.54	0.58
	0.56	0.64	0.62
	0.62	0.69	0.68

Reality 3: Good product, good purpose

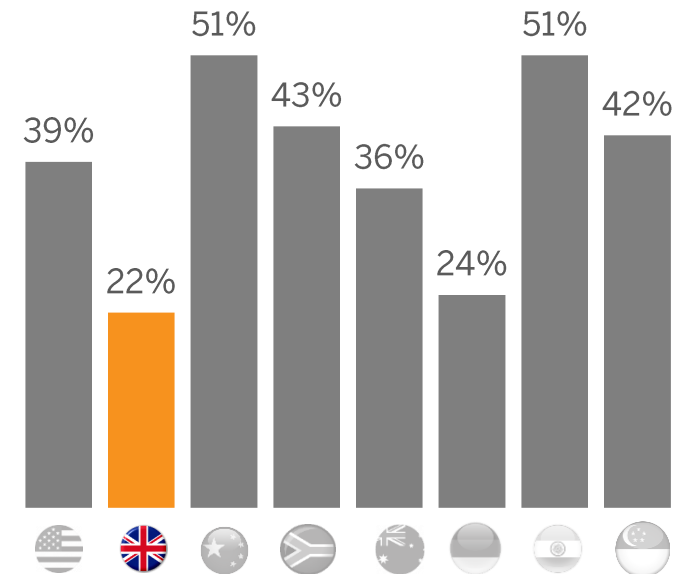
We asked the question “Are you more likely to support a brand that has a high level of purpose or a high level of functionality?”



1,2,3 (Purpose)



4,5,6 (Both)



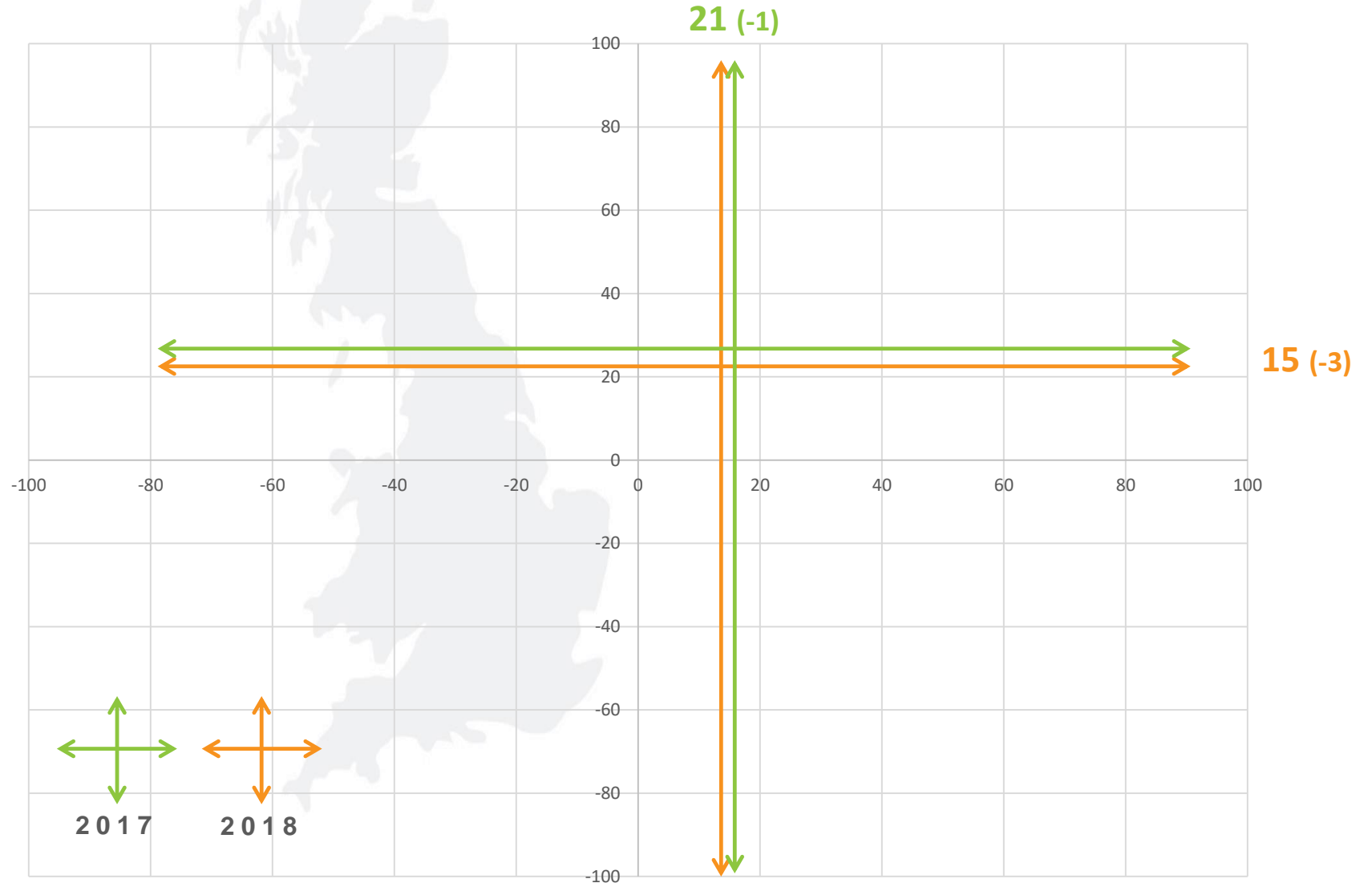
7,8,9 (Functionality)

Motion Matrix: Understanding the axis points

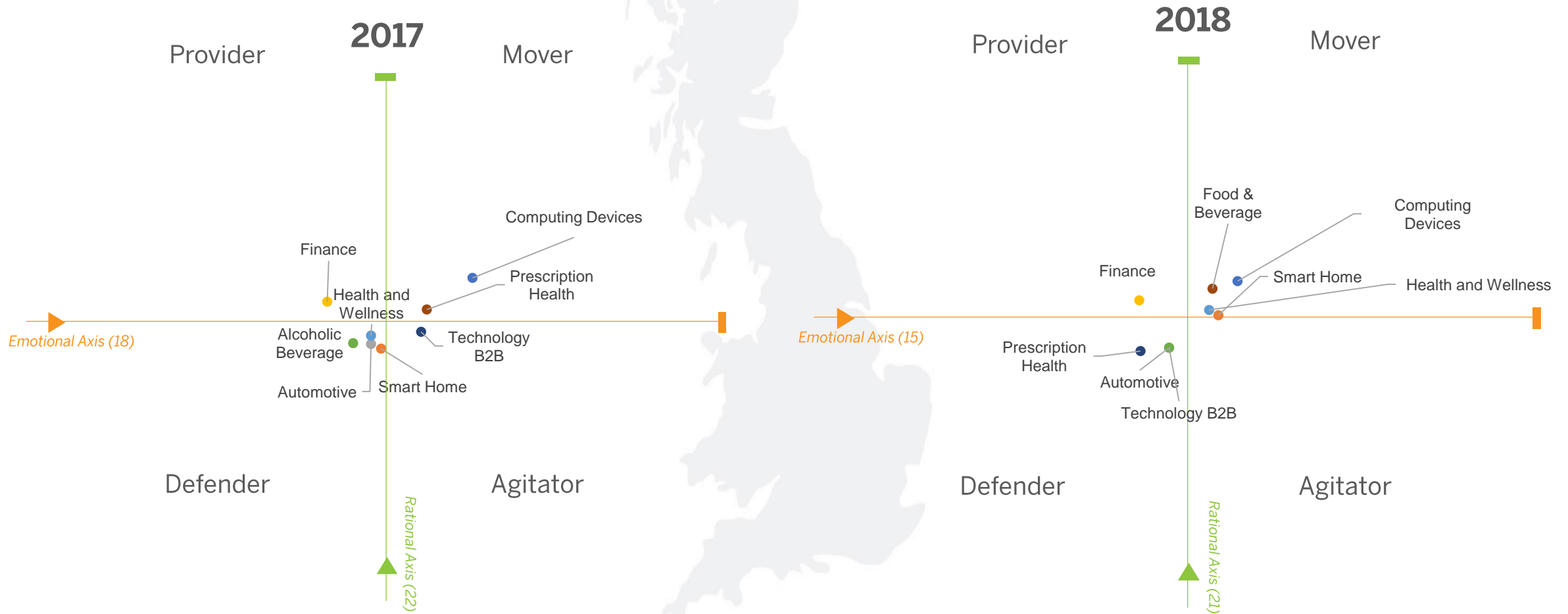
In the U.K., average rational responses are down 1 and emotional responses are down 3—largely due to precipitous drops in the emotional scores of the computing devices and smart home categories.

2017		
Category	Emotional	Rational
Computing Devices	33	37
Smart Home	17	15
Automobile	15	16
Finance	7	29
Health and Wellness	15	19
Alcoholic Beverage	12	16
Technology B2B	24	20
Prescription Health	25	27
Matrix Axis (Average)	18	22

2018		
Category	Emotional	Rational
Computing Devices	25	33
Smart Home	22	22
Automobile	12	12
Finance	6	27
Health and Wellness	20	24
Technology B2B	12	12
Prescription Health	6	11
Food & Beverage	21	31
Matrix Axis (Average)	15	21



Motion Matrix: Year-over-year comparison



Motion Matrix: Key observations

With both rational and emotional averages down year-over-year, the U.K. is the only market we surveyed in 2018 in which it's easier to be a mover.

It looks like **tech B2B** has lost its emotional connection with U.K. consumers, falling from an agitator to a defender. This may be due to collateral reputational damage from a number of breaches and hacks, as well as Cambridge Analytica.

On the other side of the coin, **smart home** seems to have proved out its value prop, moving from agitator in 2017 to mover this year—despite well-founded fears that U.K. consumers' data isn't secure. Clearly, Brits want smart home devices in their homes enough to mitigate security concerns.



APPENDIX

ABOUT BRANDS IN MOTION





2018 STUDY

8 MARKETS

CHINA, UK, US, SOUTH AFRICA, GERMANY,
AUSTRALIA, SINGAPORE*, INDIA*

26,897 consumers and B2B decision makers

8 CATEGORIES

1. Business Technology Solutions
2. Computing Devices
3. Smart Home
4. Automobile
5. Finance and/or Banking Products
6. Health & Wellness
7. Prescription Health*
8. Food & Beverage*

What WE Measured



RATIONAL DRIVERS

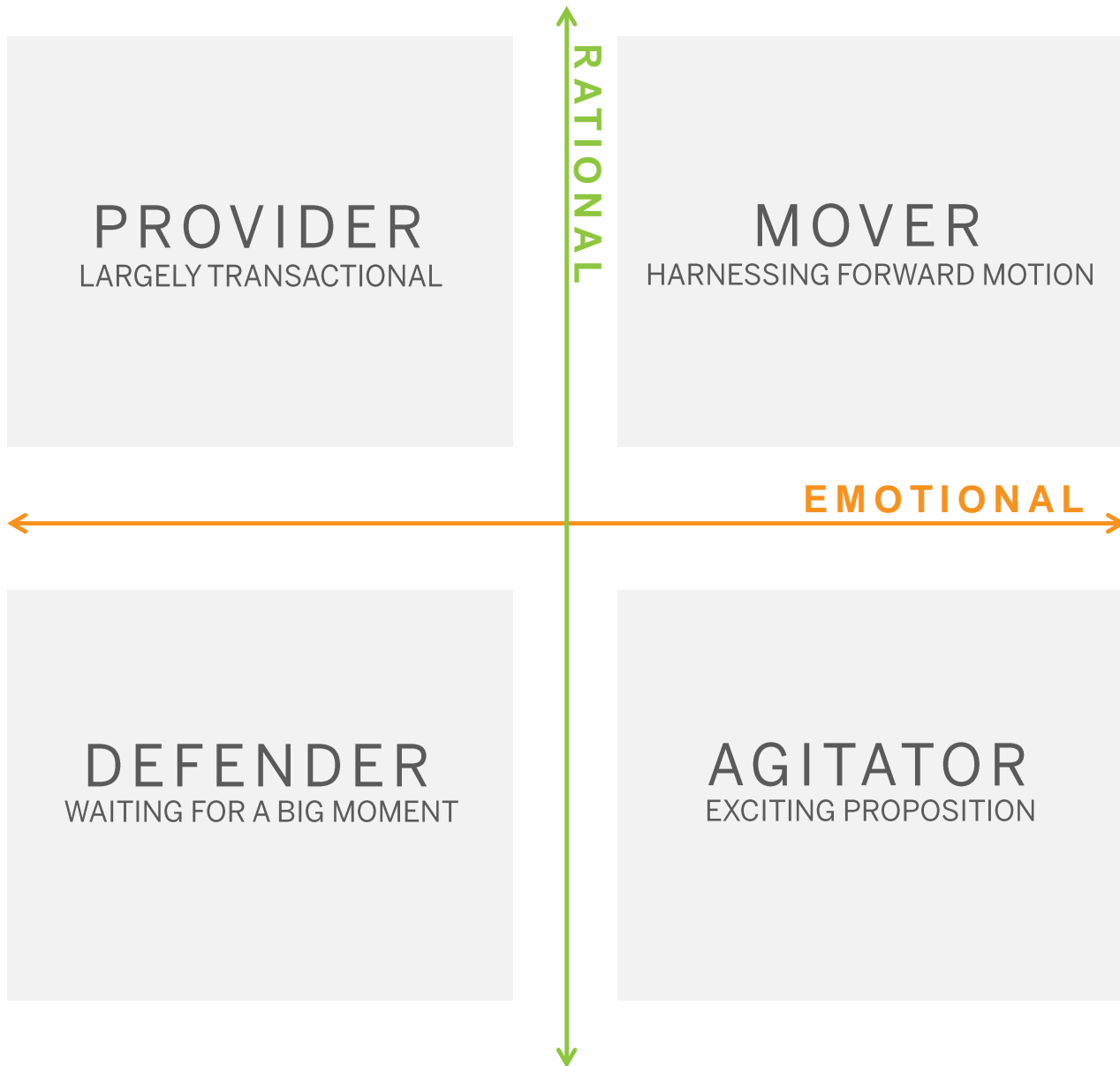
1. Executive behavior*
2. Innovative*
3. Intent to purchase*
4. Necessary*
5. Financial performance
6. Industry leader
7. Quality
8. Responsible
9. Value
10. Easy to work with



EMOTIONAL DRIVERS

1. Customer experience*
2. Defend or shame*
3. Disappeared*
4. Love/hate*
5. Overall impression*
6. Social impact*
7. Buzz
8. Forgive/not forget
9. Life impact
10. Shared values

* Measured at the category level



Defining the Quadrants

MOTION MATRIX QUADRANTS

1. Movers: Harnessing forward motion
2. Agitators: Exciting proposition
3. Providers: Largely transactional
4. Defenders: Waiting for a big moment