*Re*imagining Britishness

Content

Introduction

Three years on from the UK's formal departure from the EU – and in the middle of a cost of living crisis and endless political shenanigans - we decided to poll the mood of the nation. There was little doubt in our minds that the findings would reveal people feel pretty low, but exactly how low, we wondered (and might there be, amidst the gloom and doom, the odd ray of sunshine that could help light a path to a better place?)

As a creative agency, we know that typically, in uncertain times, great advertising serves up a healthy dose of levity. (But equally, we all saw last year's John Lewis Christmas ad – brilliant but also dubbed 'the most unapologetically depressing thing in human history' – and wanted to explore what a reasonable balance between lightheartedness and reality might look like.) We also wanted to find out if, given the particularly challenging times Britain finds itself in, levity is indeed what people want from brands.

Keeping with the Christmas theme, and with the scale and hype around festive ads in the UK being a peculiarly British phenomenon, we also wondered: to what extent do those ads reflect 'Britishness'? What even is Britishness today? And given that question, what are the implications for brands who trade on their British roots or foreign brands who advertise to British consumers.

SOURCE: The Telegraph - Threat of NHS consultants strike looms as emergency call handlers walk out -October 2022

What even is *Britishness* today?

Brand Britain
Can you define it?

Once upon a time, that's not a question you'd have had to ask. Indeed, at different stages in our not-too-distant past, many Britons had a clear grasp of what being British meant and were proud of the answer, at least at the time (in 1982, 55% of the population said they felt "very proud to be British", and in another survey twenty years later, at the height of Cool Britannia, 74% said they were proud to be British).

From our dominant role on the world stage as a colonial empire-builder to Britain's head start on the Industrial Revolution, there's a level of 'take pride in Britain' taught in schools. From the

Blair and Blur-esque years of Cool Britannia in the '90s to the 2012 Olympic Games' opening ceremony celebrating British heritage and humour, many of us remember times we puffed out our chests when talking about UK life with overseas friends. Even during the pandemic, when Britain's pace of vaccination was the fastest of any large nation in the world, and we all clapped in solidarity on doorsteps for the NHS each evening, there were reasons to be proudly cheerful.

The 2012 Olympic Games

The 90s and the Blair and Blur-esque years of Cool Britannia

But there's a clear difference between what we felt as a nation back, say, in our imperialist days versus those more contemporary examples. Yes, the era of Rule Britannia carries so many negative connotations versus the relatively innocuous notion of Cool Britannia. But what it did have was immutability, wrapped up as the sentiment was with centuries of global domination and self-glorification. By contrast, the more recent moments where we've seen national pride peak are but that, fleeting moments around which we coalesce briefly as a nation.

Despite obvious evolutions, how Britain has promoted itself to overseas visitors has remained broadly the same. There's a reason: we understand that tea, red telephone boxes and the Union Jack appeal to tourists. The problem is that how we market Britishness to ourselves has also remained pretty much the same, even though the times in which we live have clearly changed.

Think of 2016's Leave campaign, harking back to an indeterminable golden age, as the Remain campaign also did. Both groups served up a rose-tinted vision that relied on historical achievements, past icons, and nostalgia.

Over the next three and a half years, Brexit then dominated national and international news coverage of Britain. With its focus on a return to a once-glorious past and little real description of any genuine positives we might hope to gain for post-Brexit Britain, the overriding rhetoric became one of ridding ourselves of cumbersome constraints, throwing off the cloak of European-ness. Giving up things. By January 2020, as we formally prepared to leave the EU, the nation faced further psychological dispossession: The glue that bound us subconsciously to our once 'glorious' past peeled away as statue after colonial statue was pulled down.

Now we were no longer European, and at the same time, we were forced to face, in ways we hadn't been before, the damage our colonial self had inflicted on others. Who were we now? And what did our future look like?

> "The grim reality for Britain as it faces up to 2022 is that no other major power on Earth stands quite as close to its own dissolution.… It seems to me that Britain's existential threat is not simply the result of poor governance— an undeniable reality—but of something much deeper: the manifestation of something close to a spiritual crisis."
>
> Tom McTague, writing in The Atlantic, January 2022

Then came the pandemic and the Queen's special address to the nation where she quoted forces' sweetheart Vera Lynn, then 103 years old, with the line from Lynn's 1939 tune, 'We'll meet again.' For many Brits, it was a rousing call to arms, but for just as many others, it felt wildly out of kilter with contemporary Britain. Still that focus on the past.

Post-pandemic, venerable British institutions like the BBC and the NHS – establishments at the very heart of Britishness – continued their gradual decline. For those living in the UK, it started to feel like there was little left that was enduringly British. 'Good government', the weather and the monarchy, perhaps. But we know how that panned out in the last year: three prime ministers in seven weeks, extreme weather never seen before and ultimately, the death of the Queen.

A painful reckoning is underway, and the sense that any vision for its future does not match Britain's previous pride in its past is spreading. Here we are mid-2023, citizens of a nation that has a clear memory of where it has come from but little sense of where it wants to go. That's a worrying reality for a country whose leaders tout it as future-facing. It's a concern for our nation's mental health: cognitive immobility – being stuck in the past – is associated with increased anxiety and depression. And it's something that has significant implications for any brand looking to connect emotionally with British consumers – how exactly do you communicate aspiration if people aren't even sure what they're aspiring to?

Are things really *that bad?*

To find out, we polled two thousand men and women living in Britain. We asked people to tell us what they think Britain stands for today, what themes or images they associate with the country and how optimistic about or concerned for Britain they are. Given the third anniversary of Britain's official departure from the EU, we also asked people what impact they felt Brexit had had on their outlook. We then posed some of the same questions to 100+ international citizens to get a sense of how others view Britain right now.

The responses paint a depressing picture – literally. Feeding keywords that emerged from the data into an AI, Midjourney, we tasked it with creating a representative image that would reflect the nation's current mood. This is the result.
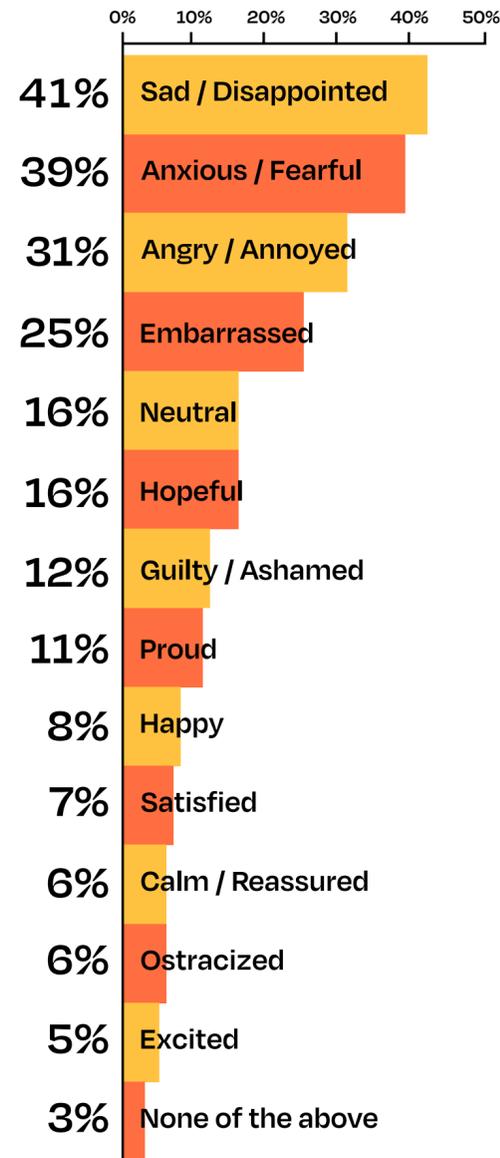
Midjourney has served up a dystopian image of Britain, one that reflects five key themes that emerge from our survey data.

1. Things are pretty bleak

Close to eight in ten people are not optimistic about the state of the nation, with the top three negative emotions we feel regarding Britain today being Sad / Disappointed (with 41% of people agreeing, including 40% of respondents who voted to leave the EU), Anxious / Fearful (39%) and Angry / Annoyed (31%). Interestingly but perhaps not surprisingly, positive emotions don't come in until "Hopeful".

Unlike some other questions where the responses from those living in the UK were quite different from our international panel, there was broad alignment on this one. Nearly half of those questioned overseas felt that Brits probably feel Anxious / Fearful today, while a third suspected we're feeling Angry / Annoyed.

	0%	10%	20%	30%	40%	50%

41% Sad / Disappointed
39% Anxious / Fearful
31% Angry / Annoyed
25% Embarrassed
16% Neutral
16% Hopeful
12% Guilty / Ashamed
11% Proud
8% Happy
7% Satisfied
6% Calm / Reassured
6% Ostracized
5% Excited
3% None of the above

"Everything to do with Britain today angers me or makes me depressed."

Male, 66, North-West England

"Britain post-Brexit, in particular over the last twelve months – I think the people are torn, confused, lost and polarised."

Swedish, 37, female

Interestingly, despite believing that the people of Britain are feeling Sad / Disappointed (the third most common response), foreigners seem significantly less likely to attribute that sentiment to Brits than we do ourselves – perhaps fabled British stoicism is still shaping perceptions of us abroad, even if we're actually miserable at home?

2. Welcome to a whole new feeling: *Bregret*

It's also clear that Brexit has not exactly cheered people, with eight in ten saying they do not feel more positively about the UK since the country left the EU. Asked how optimistic they are about the state of Britain today, 43% of our respondents who voted to remain in the EU answered 'not very' – but almost the same number of people who voted to leave the EU agreed (38%). We also phrased the question slightly differently, this time asking, *'How concerned are you about the state of Britain today?'* Four in ten people
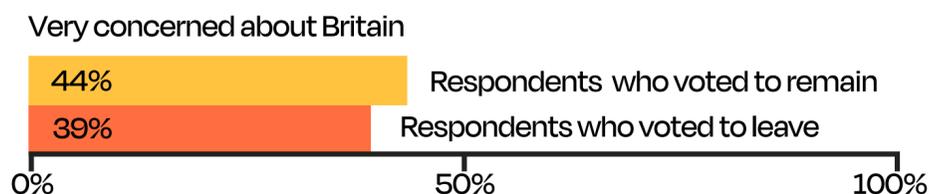
answered 'very', with the response from Remainers (44%) and Leave voters (39%) broadly being the same.

The two groups differ significantly when asked if they feel more /less positive or negative about Britain since Brexit. Only 8% of those who voted to leave the EU felt much more negatively, versus 41% of Remain voters. From this, we might conclude that Leave voters are in some way

Very concerned about Britain

44%	Respondents who voted to remain
39%	Respondents who voted to leave

0%   50%   100%

Only **8%** of those who voted to leave the EU felt much more negatively
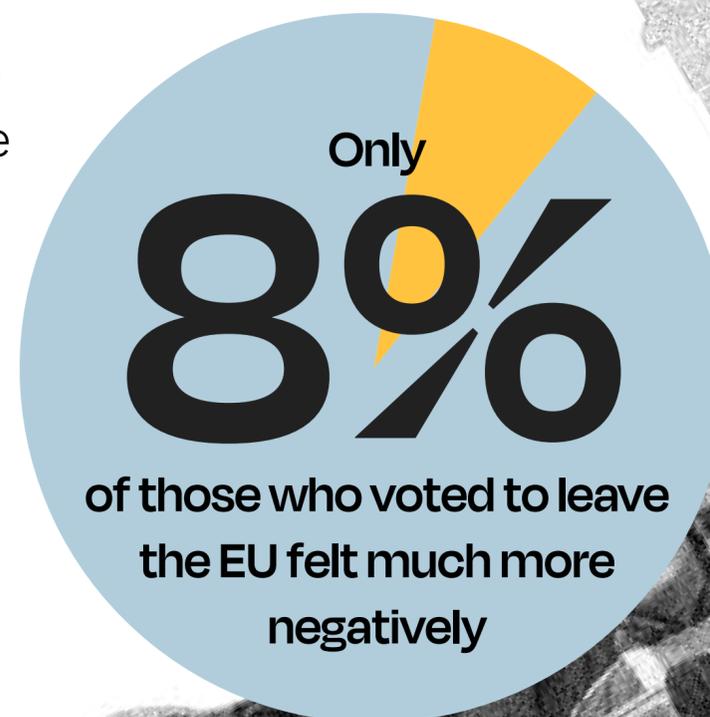
disinclined to associate the concerns they admit to having about the state of Britain today with Brexit and its impact. Psychology tells us that regret can be a particularly painful emotion, and it's human nature to try to suppress the feeling, at least initially. But try as many might, it does seem that a creeping sense of Bregret is starting to spread across the UK.

"What concerns me about Britain? Brexit, the state of the economy, the decline of the NHS, the attitude of a lot of our citizens regarding the EU and the 'little Englander' mentality. I'm embarrassed to be British."

Female, 40, Yorkshire and Humberside

'The sense I have is that most Brits think Brexit was a mistake. With the loss of someone that's been head of state and a part of the national identity for 80 years, and a dysfunctional government, Britain seems to be a little rudderless?"

Canadian, 44, male

3. *Little* vision, *lost* values

February saw the launch of a new book, *"Untied Kingdom: A Global History of The End of Britain"*. In it, Stuart Ward, professor of British imperial history at the University of Copenhagen, describes how the idea of Britishness emerged with the expansion of the empire but has slowly eroded over recent decades. Talking specifically about 'Better Together' - the principal campaign for a No vote in the 2014 Scottish independence referendum - Ward describes how the campaign lacked emotional content, instead simply going for *'fire and brimstone'*. Because, as he says,

"it is much more difficult to devise what (positive) emotional arguments are likely to be when the unifying emotional prism has fundamentally cracked,"

an explanation that sounds remarkably similar to criticism levelled at the 'Britain Stronger in Europe' campaign.

Data from our survey certainly hints at a lack of a shared vision and identity, 'or unifying prism' with three themes that people associate with Britain emerging: Democracy tops the list at (48%), followed by Tolerance (37%) and the Rule of Law (36%).

People associate Britain with...

37%
Tolerance

36%
Rule of Law

48%
Democracy
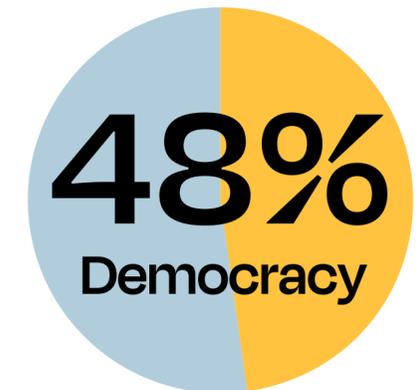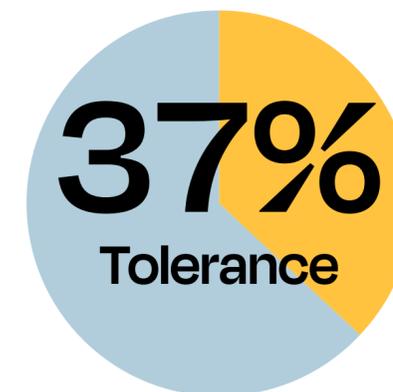
What's interesting is that Britain lacks a stand-out value compared, for example, to the US, where more than nine in ten Americans say that belief in individual freedoms is important to being "truly American" (and one in six say there has never been a time they have not been proud of their country). Or France, where national pride has reached a peak, with 92% of French respondents in the European Values Survey saying they were proud to be French, with that sentiment linked closely to the notion of 'Liberté. Égalité. Fraternité.'

"There are not many values left. Values are mainly now for the elite and super rich."

Male, 48, East of England

"My perception is that Britain is a conservative and powerful patriotic nation that believes more in order and hierarchy than ethics and human values."

Mexican, 34, male

4. *Inclusivity* **versus** *exclusivity*

Meanwhile, while over a third of us consider Britain an inclusive nation, the perception overseas is a little different. Our poll shows that *'tolerance'* is the second highest rated British value to come to mind, after 'democratic', with more than a third of people questioned agreeing they associate the word with the UK. There does, however, appear to be a disconnect between how we view ourselves and how people living in other countries perceive us. Although a far smaller sample size, just *21%* of foreigners who were asked the question responded similarly, with the perception of diminishing inclusivity since Brexit coming through in the open-ended answers.

This sentiment is supported by data from the British Council, the UK's international organisation for cultural relations and educational opportunities, which revealed that when global respondents were asked if they agreed people from the UK valued diversity, were open, welcoming and tolerated those with different faiths and beliefs, the levels of agreement fell by a statistically relevant two per cent after the referendum.

That said, it is a fact that no country in the EU today has equality legislation to match the UK's 2010 Equality Act, and there is a sense that Europe will become less multiculturalist without the UK's lead. While much is made of the reality that

the single biggest reason people gave for voting Leave was immigration, few realise that about a third of ethnic minority voters, especially British Indians, voted to Brexit. Their rationale was at least partly because they felt that white European migrants enjoyed a privilege – freedom of movement within the EU – one that non-white migrants from the rest of the world did not. (Statistics now show that since Brexit, white European migration into the UK has declined, and non-white migration from the rest of the world has increased.)

As Tariq Modood, director of the Centre for the Study of Ethnicity and Citizenship at the University of Bristol, reminds us,

"The UK, in fact, continues to be a leader in the region in relation to racial equality laws and policies, to the presence of ethnic and religious minorities in public life, including at the highest levels of government: not just the appointment of a British-Indian Hindu as prime minister but in the disproportionate presence of ethnic minorities in recent Cabinets, and in remaking the national identity so that it is not just monocultural, white and Christian/secularist."

"There is tolerance and kindness among ordinary people and communities in Britain"
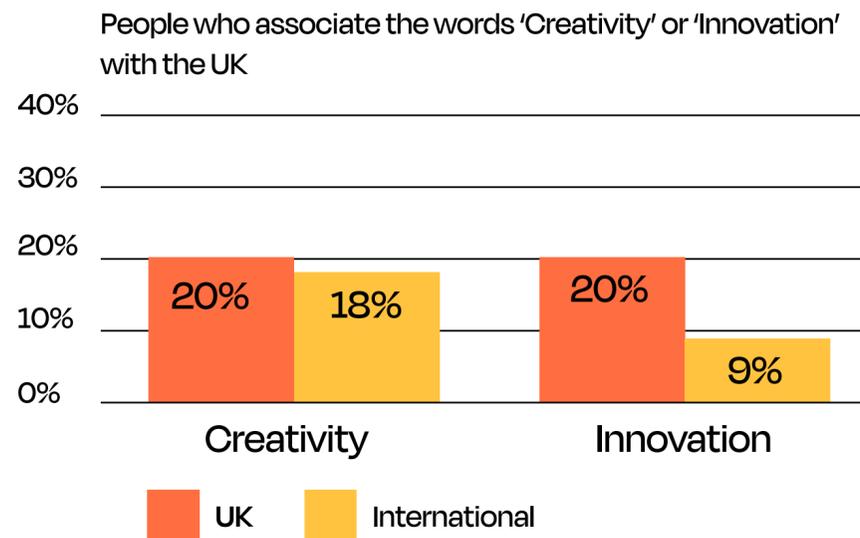
Female, 52, East of England

"It's a mess. Turbulence due to self-righteous politicians and a prejudiced people."

Swedish, 35, male

5. Creative *negativism*?

British people are only somewhat confident in describing the UK as innovative, with just 20% of our respondents agreeing and our international straw poll showing similar or lower positive associations. While research we [previously](#) conducted into creativity around the world found Europeans typically express lower levels of creative self-confidence than their counterparts in Asia or the US, there does appear to be a particularly sharp divergence between self-perception and reality for Britain specifically. The UK, after all, has a [consistently](#) *higher-than-average global innovation ranking*, according to a decade's worth of analysis by Cornell University, INSEAD, and the WIPO. (The same is true about creativity: According to the British Council, despite containing less than 1% of the world's population, the country has one of the largest creative industry sectors globally.)

People who associate the words 'Creativity' or 'Innovation' with the UK

Bar chart — Creativity: UK 20%, International 18%; Innovation: UK 20%, International 9%

Legend: UK (orange), International (yellow)

"Nearly three-quarters (**70%**) of global audiences recognise "Britishness" as a mark of high-quality, with a third (**30%**) of adults saying that British film and television influences their view of the UK which is a testament to the sector's ability to showcase British talent with international success."

Research commissioned by the UK's Department for Digital, Culture, Media, 2021

Perhaps the reason more Brits don't consider innovation and creativity to be key attributes of 'Brand Britain' is less about self-confidence and more about the fact we continue to hark back to our past when discussing innovation versus talking in future-facing terms. Take, for instance, the government's 2021 UK Innovation Strategy document, whose section on how the country is perfectly positioned to lead a renewed global spirit of innovation led with

"*We have one of the greatest innovation heritages in the world, having birthed modern science in the 17th century and transformed it in the 20th.*"

It's surely time to look forward and instead lead with messaging that reflects our modern-day reality as a nation: Britain is a global home to several vital sectors likely to transform our world in future

decades, such as life sciences, AI, and quantum. High-employment, high R&D investment sectors such as automotive and aerospace - key players in new technology development – also have homes here. Additionally, the UK has Europe's top venture capital markets, with the highest volume of investment into tech companies in 2020 at *$14.9 billion*.

Food for thought.

"Britain is a country that is struggling to preserve its identity and is regressing, while focusing on past glories, rather than moving forward and evolving."

American, 52, female

6. Pictorial tropes as cultural identity

Way back in *1999*, an international survey by Ipsos found that the images most often associated with Britain by foreigners were:

- Kilts, mountains and whisky for Scotland.

- Castles and rugby for Wales

- and the Royal Family, Big Ben and the Tower of London for England.

At the time, the British Council was concerned about the findings, commenting,

"This has implications for public diplomacy. What can be done to close the gap between perceptions overseas and the reality of contemporary Britain without ignoring the strengths of our traditions for which we are respected?"

It was an insightful question then and remains one today. Not only in terms of how we market Britain and Britishness overseas but also in how we sell it to our own people at home. Setting aside the fact that unless specifically prompted, Britishness tends to correlate most closely to 'Englishness', findings from our survey show that it's not only people outside the UK who turn to stereotypical images when thinking about Britain but also those of us living here. In our survey, The Royal Family emerged as the motif most of us associate with Britain currently (72%), followed by the weather (60%) and food (roast dinners, tea, fish and chips etc.) at 48%.

What things do you most associate with Britain as a nation?

Food	48%
The weather	60%
The Royal Family	72%

0%   50%   100%
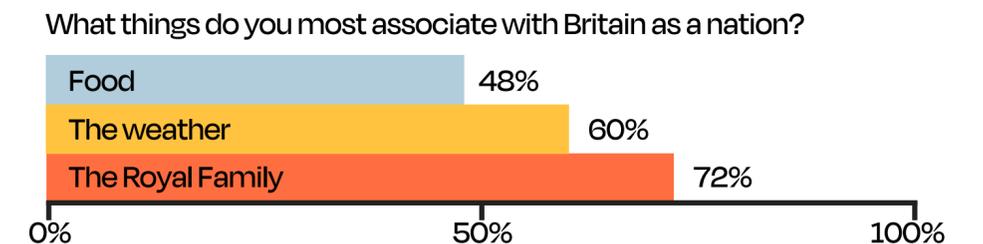
Perhaps unsurprisingly, given the timing, in our international straw poll, 'The Royal Family' scored even higher, being the first image that came to mind for eight out of ten respondents, but 'Pub Culture' and 'Culture / Media – e.g. The James Bond franchise, British musicians" followed, surpassing any other associations by quite some way.

You could argue that while some of the images that people overseas have in their mind's eye when they think of Britain have evolved in the last twenty years, what Brits themselves associate with their country has not. We remain stuck in the past, 'enjoying' a peculiar fondness that only nostalgia can bring.

Tea, anyone?

"Can Britons raise up from this from a more cultural and creative angle? What can they do to shift the focus of bad press to focus on the country's culture, art, creativity, food, fashion? In times of crisis, people's hope can be pegged to that of softer assets the likes of culture, art, fashion etc."

Singaporean, 42, female

The Opportunity

Britain and Britishness are at a crossroads. It feels like time has finally caught up with us, and we're being forced to confront our reliance on past achievements to shape a sense of who we are or want to be. Little surprise then that for the first time in 15 years, the UK has decided to participate in the renowned World Values Survey, which for 40 years has polled citizens of more than 100 countries. As the leaders of the UK project team say,

"Currently, we lack an understanding of the values driving division, what we can learn from other countries, and how long-term trends in attitudes and values are diverging or converging. Absent appropriate evidence bases,

we potentially risk exaggerating the level of division, missing what brings us together, talking ourselves into problems we don't currently have, and mischaracterising the real nature of the challenges we face. "

As a creative agency driven by research-based insights, we couldn't agree more. The idea that we're '*Missing what brings us together*', effectively preventing us from defining a modern-day brand for Britain, was one of the driving forces for our project. What if by focusing on contemporary truths, experiences and idiosyncrasies, instead of the hubris associated with imperial Britain, we could craft a pragmatic but ambitiously outward-looking and progressive narrative and brand for Britain?

Looking at the data from our findings, it's undeniable that a significant proportion of Brits feel sad and pessimistic. But dig a little deeper, and what also emerges is a certain resilience and perhaps a uniquely British sunny disposition hiding in the wings: more than one in ten of our *2000 UK respondents* literally responded with the almost comical - and unprompted - 'Things can only get better' (or a slightly different version thereof) when asked what cause for optimism they have.

What might leaning into this insight, in a glass-half-full way, look like for British brands?

1.

36% of our UK respondents associate queuing with Britishness, and *60%* automatically think of 'the Weather' as a British institution (both of which feature heavily on the Twitter account, 'Very British Problems' with its 3 million plus followers, content which is regularly picked up by international publications and joyfully celebrated).

> **VeryBritishProblems** ✔ @SoVeryBritish · 6h
>
> One of the biggest adrenaline rushes a British person can get:
>
> Saying "excuse me, there's actually a queue"
>
> 💬 74   🔁 293   ♡ 2.900   📊 248.590   ⬆️

Then there's the nation's tendency towards sarcasm and self-deprecation, both well-recognised and considered key elements of our national brand of humour (indeed, Britain was voted Europe's funniest country in 2017, and 47% of people in Britain consider their sense of humour as their best attribute.) All this against a backdrop where just 14% of UK news is positive. Somehow, we keep on keeping on, taking solace in our quirks, stoic to the last. There's a lot here to lean into for advertising that does its best job when it makes people feel good and reflects hopes, daily realities and positivity.

47% of people in Britain consider their sense of humour as their best attribute.
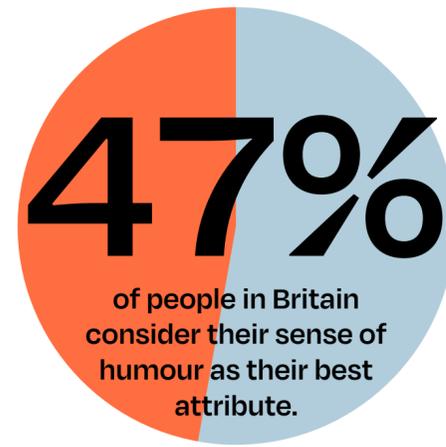
British Airways used relatable insights about the British experience, creating a culturally resonant tone of voice that builds excitement for holidays.

2.

The strong associations that respondents in our survey have with landmarks, institutions and iconography show how important these things are to the people of Britain. There's a reason we hold these images dear – *they provide a feeling of reassurance and safety*, and despite the widespread dismay that comes through in our survey data, there are pockets of great pride. Deployed judiciously, in cleverly contemporary ways, brands looking to engage with Brits can benefit from a halo effect created when you draw on resonant physical representations of Britishness.

Daniel Craig for Belvedere flipped the script of the very British institution of James Bond to create surprise and joy.

3.

Make today exciting
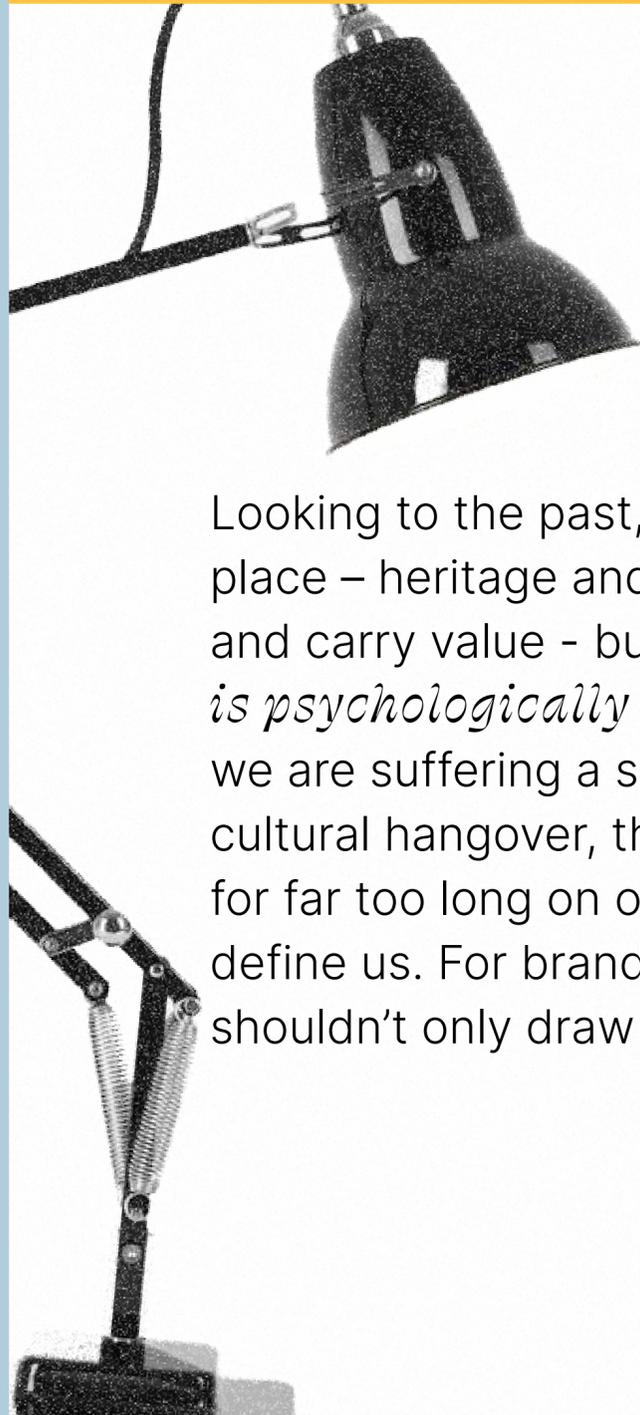
Looking to the past, of course, has its place – heritage and provenance matter and carry value - but empty *nostalgia is psychologically painful*. As a nation, we are suffering a seemingly endless cultural hangover, the result of relying for far too long on our former glories to define us. For brands, nostalgic branding shouldn't only draw you to the past but rather create a bridge that links times gone by with the future - one that might look quite different and exciting. Finding a way to celebrate Britain's modern-day inventions in this way, *louder and prouder,* will undoubtedly help fix the nation's perception/reality gap regarding creativity and innovation.

"A country that is struggling to preserve its identity and is regressing, while focusing on past glories, rather than moving forward and evolving"

American, 52, female

"Britain is about pride in the past without endeavour in the present"

Male, 56, South East England

4.

Take pride in people

Our research shows that while pride in the nation may be on the wane, people remain immensely proud of individuals and local culture. Storytelling that focuses on the achievements of individuals and communities will enable brands to create moments of connection with wider Britain. Never was the adage *"talk to everybody by talking to somebody"* more accurate, particularly at a time when side-stepping the somewhat miserable reality of the bigger picture is not only smart but arguably necessary.

Nike Londoner focused on individual stories of personal achievement, offering a fresh point of view on British stoicism.

Live and champion DE&I

The values most important to the UK that emerge from our survey are democracy and tolerance. Despite the broken international narrative of British isolation and exclusivity, the UK has one of the *highest rates of mixed marriages globally*; one in four babies born are born to immigrant mothers, and Britain is today one of the most multi-ethnic, multicultural countries in the world. Yet only 37% of kiddigrants – the children of immigrants - say they feel represented in advertising in the UK, lower than any other ethnic minority generational group.

37%
Amount of children of immigrants who feel represented in UK advertising
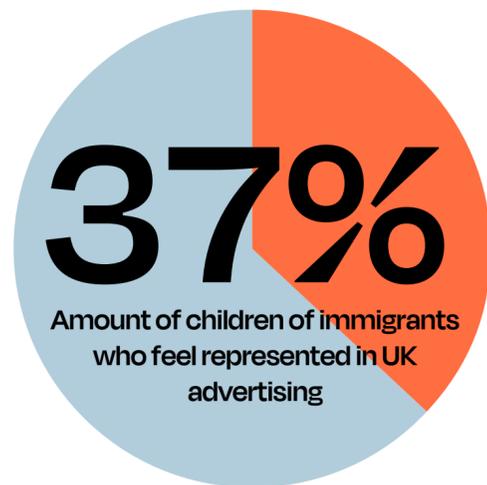
Our work for George at ASDA, celebrating all people who feel empowered by fashion and femininity, in all its forms.

Conclusion

The idea of 'Brand Britain' will mean different things to different people. It is, after all, a medley of perceptions, prompts and received wisdom. But, importantly, it's not fixed. As Britain evolves, so too must our brand.

Understanding the values – traditional and those that are more contemporary – that British people hold dear is critical. So too, is drawing out the elements that unite us as a nation, shared experiences and emotions that we may not be fully aware of. Doing this will get us to 'modern Britishness', the holy grail we all seek today and which will ultimately help brands win.

We believe the role of marketing and advertising here cannot be underestimated. As an industry, we can undeniably help flip the narrative to tell a more positive story for Britain by crafting a resonant tone of voice that's rooted in the British psyche, by leveraging nostalgia but in truly perceptive and bridging ways, by balancing localisation and broad messaging when the objective is national relevance, and ultimately creating stand out, by cutting through the grey with creativity.

We're here for it.

Brand + Britain

Rebranding Britishness

A Starter for Ten from CPB

Armed with the data from our survey, we rolled up our sleeves and dived in. If even during such challenging times, one out of every ten of our respondents told us - unprompted - 'things can only get better', how could we draw on that spirit to help reframe how people think about Britain today?

The insight

Despite the nation's latent optimism, Brits often hone in on the negative of the now. Positivity, by contrast, remains a more ephemeral concept.

The idea

Let's remind Britain that for every bad thing about the UK, there is so much that's good we can feel proud of.

Methodology

Using Perspectus Global, we polled 2131 general respondents in the UK via online surveys in Jan and March 2023. This included 908 men and 1121 women. 748 respondents had voted Leave in the Brexit referendum of 2016, while 692 voted remain, 560 abstained from voting and 32 spoiled their ballots. CPB also ran a straw poll in January of 109 men and women from 16 countries across North America, Asia, Europe and Latin America.

Thank you!

The Brassworks

32 York Way

London, UK

N1 9AB

+44 (0) 20 3971 4242

Helen James

CEO

hjames@cpbgroup.com

+447825846689