



Insight & Supporter Data

# Trends 2030

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Preparing For The Future:  
Overview

July 2018

**M&CSAATCHI**  
INTELLIGENCE

# Looking forward

We commissioned M&C Saatchi, our trusted Insight partner, to identify the big trends that will impact society in England, Wales and NI between now and 2030, using the Social, Technological, Economical, Environmental and Political (STEEP) framework.

Saatchi scoured multiple trend resources<sup>1</sup> along with studies in the public domain, before analysing and consolidating the trends, and extrapolating them into six major themes.

Analysis looked at how those changes could impact the NT's relationships with audiences, over that timeframe – with a particular focus on Volunteering, Participation and Inclusion (VPI).

The trends presented here are relevant to the general population. The full report looks at the extent to which different audiences may be impacted, including by segment.

Source: <sup>1</sup>From the ONS to Kantar's TGI and YouGov Profiles data, Trends organisations and third party experts from VPI backgrounds. This work also draws on recent research for the Trust looking at the trends impacting the lives of our audiences in 2018.





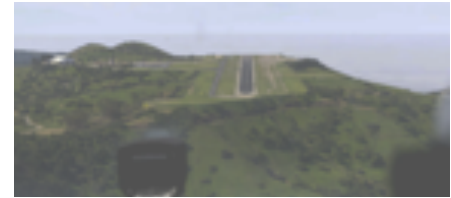
## Citizenship

People are tackling issues closer to home, supporting their local community economy, and making it work for them.



## Nurture

Busy lives are opening new opportunities for escaping the noise and indulging in cultural and spiritual 'me time'.



## Control

People are trusting less, questioning more, and demanding greater control, transparency and value.



## Connection

We are more connected than ever digitally, but as social beings, we continue to strive for ways to connect in person.



## Narrative & Identity

Identities are becoming more polarised, as people seek out extremes of opinion. Geographic identity is also changing with the increased mobility of work and home.



## Automation

Technology was once seen as the antithesis to human interaction, but people are increasingly demanding tech with a more human touch.

# Citizenship: A growing sense of social responsibility

From online petitions, to #nomakeupselfies, to a growing commitment to 'local community', it's become 'cool to care'.

Being political and 'eco conscious' is no longer just for radicals or the establishment, with more and more people getting behind and raising awareness for campaigns; 62% of millennials say they actively support brands that take a stand on issues they feel strongly about.

Consumption is seen as out of control; food waste, packaging, paper and plastic are getting more and more airtime amidst growing concern.

Social media has a growing influence – with young people using it as their starting point for political news – with sensationalism and fear-mongering informing decisions.



60% & 62%  
of Gen Z & Millennials

say they actively support brands that take a stand on issues they feel strongly about



## 2030 Implications:

- What social causes will engage and resonate with our audiences? **#cooltocare**
- What are the opportunities to partner with local communities to drive change – and where shouldn't we be involved? **#participation**
- How do we reflect and respond to consumer expectations on sustainability? **#carefulconsumption**

# Nurture: Escaping the race for attention

We live in an era of non-stop digital distraction. The human capacity to apply concentration to a chosen subject, and our ability to understand anything in detail, reaches a daily limit.

People are trying to focus on one thing at a time, and brands are increasingly responding to the 'glance economy' – to capture our fleeting attention.

More value is being placed on emotional intelligence, soft skills, wellbeing, and spirituality. Demand is rising for services that focus on removing the negative effects of the physical and/or digital environment.

There is heightened awareness of the importance of diversity and inclusion – with many wanting culture to be truly accessible.

## 2030 Implications:

- Can the Trust truly offer peace and tranquility all year round – what are the operational and capacity challenges?  
**#mindfulmoments**
- Where are the audience tensions – do all of our audiences want us to increase accessibility? How do we manage that?  
**#equalaccess**
- More listening, less telling as an organisation  
**#twoearsonemouth**



# Control: Demand for greater control, transparency and value

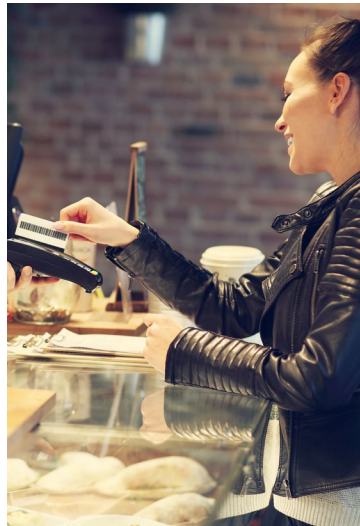
We're giving companies more control in the form of intimate knowledge of our lives through data footprints, from the time we wake to the goods we buy, the way we travel and what we chose to watch.

Traditional institutions are losing the authority they previously enjoyed – data scandals have contributed to declining trust, with individuals wanting to 'take back control'.

Cash-strapped and tech-savvy consumers continue to seek the best deals possible – more than 50% of consumers say that they are, or want to be, 'more thrifty with money'.

Many brands are tapping into the human need for control, by offering personalisation at scale – every consumer wants to feel unique.

This extends beyond the use of personal data, to how we share ideas, skills, and expertise with our audiences.



## 2030 Implications:

- How do we deliver personalisation whilst providing confidence over use of data? **#youiverse**
- How do we best compete with other visitor attractions to a cost-conscious market? **#maximising**
- Micro-volunteering offers an opportunity for greater personal control over time commitment **#ownership**
- How and when do we share control with people, valuing expertise from both sides? **#equalpartners**

# Connection: Closer digitally but more distant physically

Technology will only become more universal and impossible to live without – interactions in 2018 demand instantaneous reaction, and we only have finite time and resources to manage these expectations.

Yet we remain social beings, who enjoy coming together, connecting and collaborating.

So whilst platforms for digital encounters evolve, there will continue to be opportunities for organisations to facilitate, cater to or benefit from this basic desire to connect.

Despite this, Britons between the ages of 16 and 24 report to be lonelier than those over the age of 65.

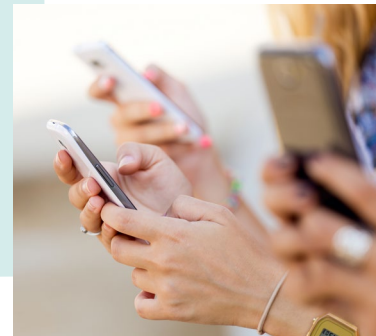
Digital does - and will continue to - drive a sense of isolation through distance, or intense connection, depending on values, age, purpose and frequency of use.

## 2030 Implications:

- How do we better use technology to drive connection, for those that want it? **#techenabling**
- How do we balance this, with not alienating our core supporter base? Connection in the future will need to span cultural divides and generational gaps **#agelessociety**

The average person checks their phone

**150 times**  
a day



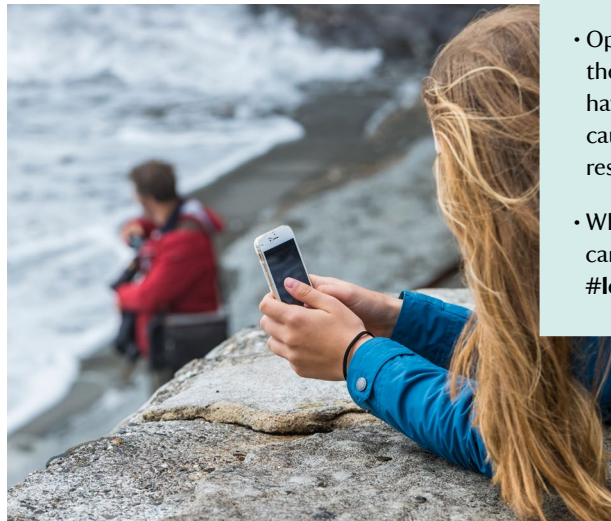
# Narrative & Identity: Polarising identities, externalised through ‘the museum of me’

Audiences are searching for exciting, enriching experiences, and stories to share for kudos and personal satisfaction beyond the everyday.

Social media and the ‘museum of me’ are externalising people’s identities with impacts on the sense of self. Extreme opinions win out in social feeds and headlines – to be in the middle ground is to fade into the background.

At the same time, we are seeing the backlash, as the ‘de-tech’ trend sees more people choosing to go off-grid.

Fluid geographic identities are changing the sense of what is ‘local’, with the renaissance of cities as places of collective identity or coming together, and increased mobility in places of work and residence – will the county or shire be as relevant in identity, by 2030?



## 2030 Implications:

- Will polarised identity leave the Trust struggling to find a neutral voice? **#polarising**
- Opportunities exist to seek those with influence, who have a natural affinity with the cause, and whose stories will resonate **#storyseeking**
- What role do places in our care play in local identity? **#localmatters**



# Automation: Technology with a human touch

Everything invented in the past 150 years will be reinvented using AI within the next 15 years.

Trust in AI and automation differs drastically. The general public remain apprehensive, despite it being ingrained in much of what we do (driving, guides; streamlining services and responding in real-time).

Computing capacity has improved to allow voice, video, clicks, mobile location and sensors to be understood. Technology is a new normal, helping to run the household, and even becoming part of it; one in three consumers will have used voice commands on personal devices by 2025, and smartphone penetration will be up to 91% by 2020.

Automation will save consumers time but cause job insecurity and potentially even backlash, as impacts on the labour market and traditional job roles continue to play out.



Smartphone  
penetration up to  
**91%**  
by **2020**

## 2030 Implications:

- What level of automation do our audiences want? We'll need to measure appetite closely  
**#trust #acceptance**
- Use technology appropriately, and led by audiences  
**#humanintherightplaces**
- What would make our audiences lives easier?  
**#aiadvisors #voicecommand #automatedcommerce**

# Final word

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