



# Heart of Britain 3

JUNE 2021

A photograph of three women smiling. The woman in the foreground is wearing a light pink shirt. The woman behind her is wearing a dark top. The woman on the right is wearing a dark top. The background is slightly blurred.

# Heart Britain

FUTURE



# Strength | Community | Influence

# The DNA of Heart of Britain

## Everyman/Everywoman

The everyman archetype represents those who are dependable, down to earth realists. They value authenticity and realism. Grounded, and forms close community bonds.

## Sage

The sage seeks truth, and values ideas and understanding above all else. Good listeners and teachers, they share wisdom.

## Caregiver

Caregivers are full of empathy and compassion. They seek to help and look after others, and are centred on family and relationships.

## Joker

The joker aims to lighten up the world and make others laugh, yet has complex depths. They want to make others happy, and use humour for positive change.

An enormous **87%** say it's up to **them** to make the best of things for themselves and their families.



They work in caring and customer facing roles

**+51%**

more likely to work in healthcare and social welfare

**+22%**

more likely to work in education

**+21%**

more likely to work in retail and services



# She has a presence in multiple communities

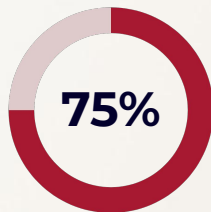


## What's New

She chooses to support causes that are **closer to home** or resonate on a **personal** level

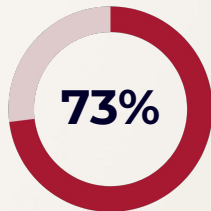
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*"I prefer to support causes that I can see the positive effects of"*



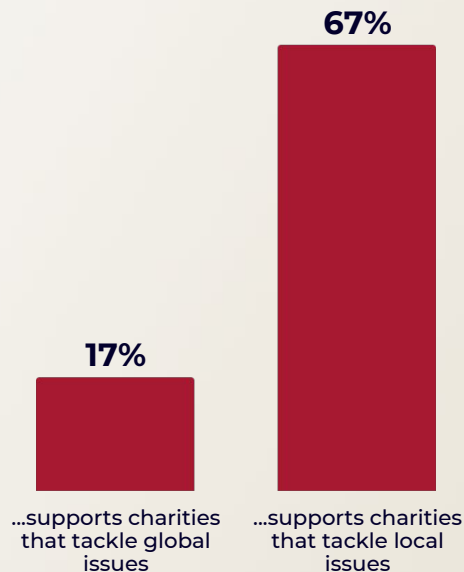
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*"I prefer to support causes that are personal to me or people I know"*

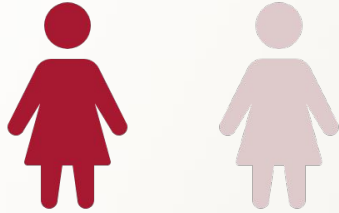


And this is very much reflected in HOB's attitudes when it comes to **choosing which brand to buy.**

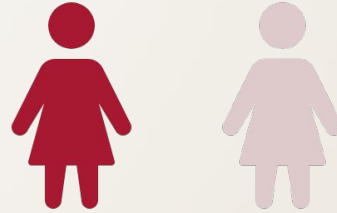
All other things being equal, how likely HoB women are to buy from a brand that...



## What's New



**1 in 2** are prepared to **pay more for products from a brand they buy frequently** if they know the brand has strong ethical credentials



**1 in 2** are prepared to **buy products from a brand they don't usually buy** if they know the brand has strong ethical credentials

8

Q25a Top 2 - If a brand which products you already buy frequently did each of the following, would knowing this make you more or less likely to be prepared to pay more for their products/services?

Q25b Top 2 - If a brand which products you don't usually buy did each of the following, would knowing this make you more or less likely to be prepared to buy their products/services? Base: HoB women (1200)



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## What's New

They will pay more for sustainable food products but have an expected price increase in mind



**8 in 10** expect and are willing to pay extra for sustainable food products.

However there are some expectations linked to cost.

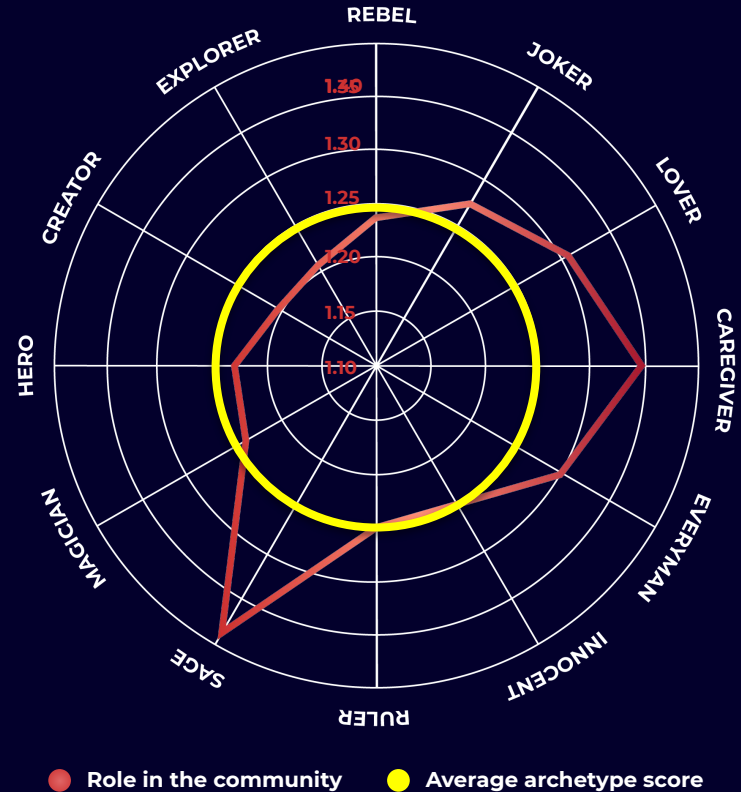
We tested various price points for HOB women and noticed a significant drop off in purchase intent if a sustainable product cost more than **19%** more than equivalent.



# Influencing those around them

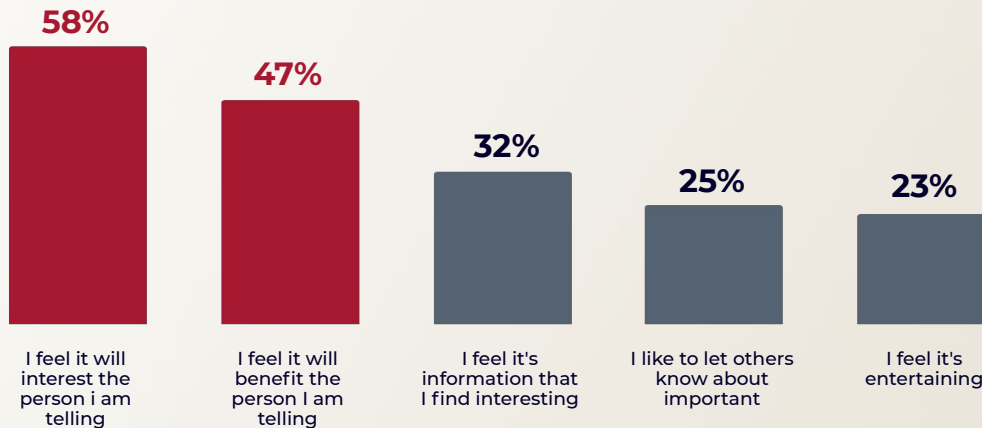
They clearly define their own role in their (local) community

They are **natural born influencers**, informers and advice givers

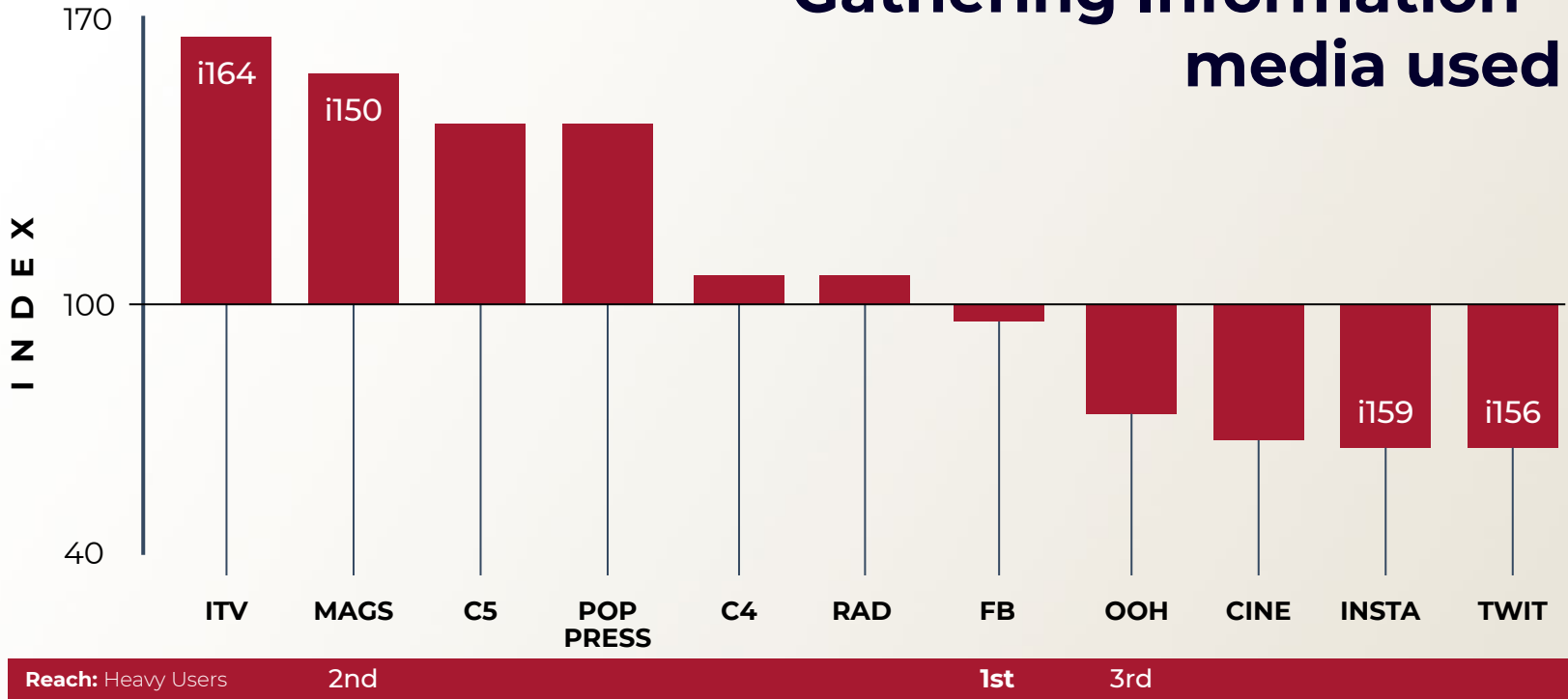


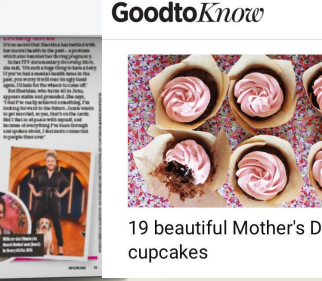
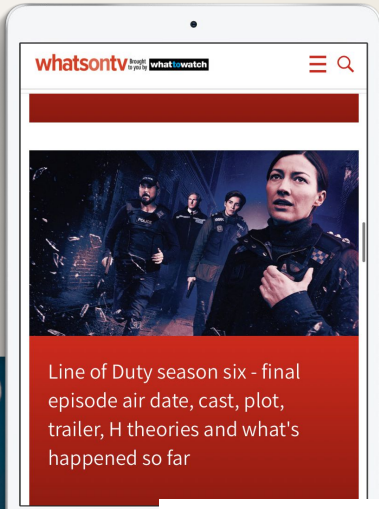
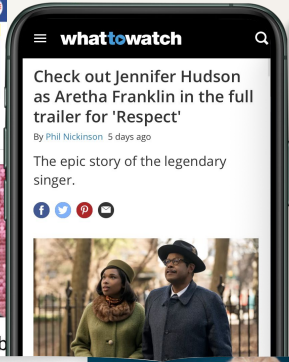
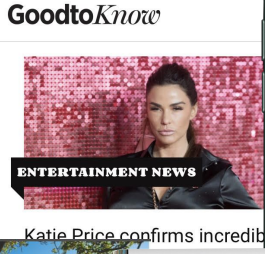
This willingness to share is largely motivated by feeling it's relevant or beneficial to others

### Reasons for sharing what they read in magazines



# Gathering Information - media used





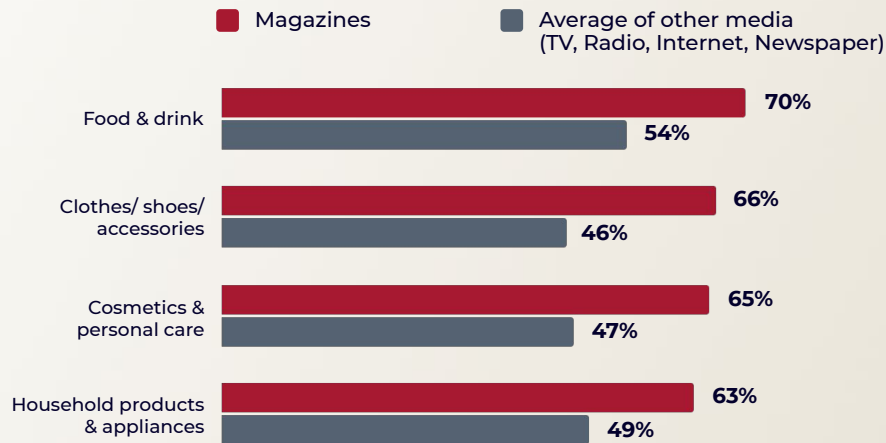
Our editorial provides a dual role of inspiration and entertainment and has evolved across the pandemic

The curated nature of magazines means that content has instant credibility

89%

of Heart of Britain women share information they read in magazines with others

Trust information by source



Across all categories information in magazines has a higher degree of trust compared to other media

# Tone of voice is key

All who agree with the following statements

76%



Info in mags is more friendly, reassuring & reliable than other media

55%



Mags are the best media for passing on info

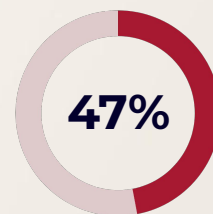




HOB are a great conduit to advertise public service messages to

**64%**

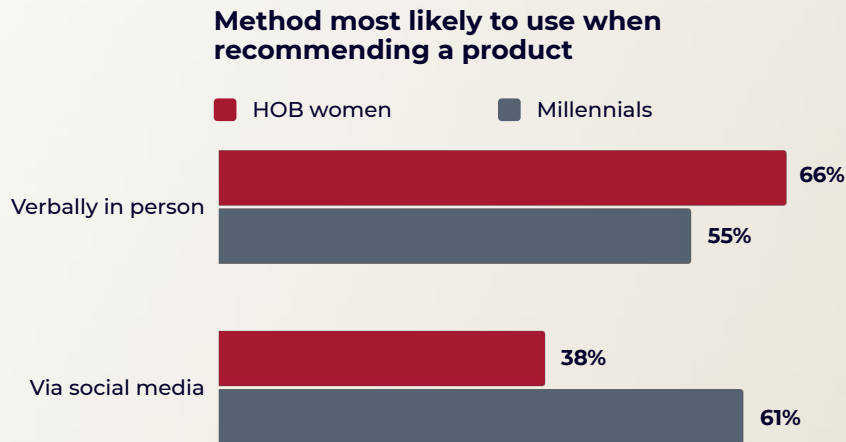
Will share messages designed to inform or educate the public



Likely to share messages from the Government or other public service bodies



There is a generational divide in how women like to recommend products



# Retail

## Influencing the Influencer

### Likelihood to purchase by source of recommendation





# Savviness | Economic Power

Value for Money  
1



Price I am willing to pay  
-----  
Do I/ my family like or need it?

*"I usually buy my fruit from Morrisons, stuff like pink apples, they taste different to what they do at ALDI and Lidl. I don't know what it is, but I'd rather pay that bit extra and buy it from Morrisons"*  
(Leeds)

Value for Money  
2



Is it the quality I want?  
-----  
What satisfaction, pride or joy will it bring me?

*"If I'm spending money on jeans they would be Levi's because they last, but if it was just fashion like ripped knees and stuff, it would be Primark"*  
(Newcastle)

Value for Money  
3



Is it a proper deal?  
-----  
Will that deal be better elsewhere?

*"I no longer do the weekly shop online because I know I can pick up bargains by shopping around"*  
(Essex)

# Savviness takes many forms

“If we go abroad I buy my currency up front so that I don't get ripped off by bad exchange rates.”

“I tend to balance the number of premium and basic items in my trolley - some items are definitely worth spending extra on.”

“I use coupon sites and vouchers to save money while I shop.”

“My credit card gives me cashback so I always use it for bigger purchases - and the weekly shop.”

“I always used 3 for 2 offers when I buy stuff that lasts longer like shampoo or vitamins”

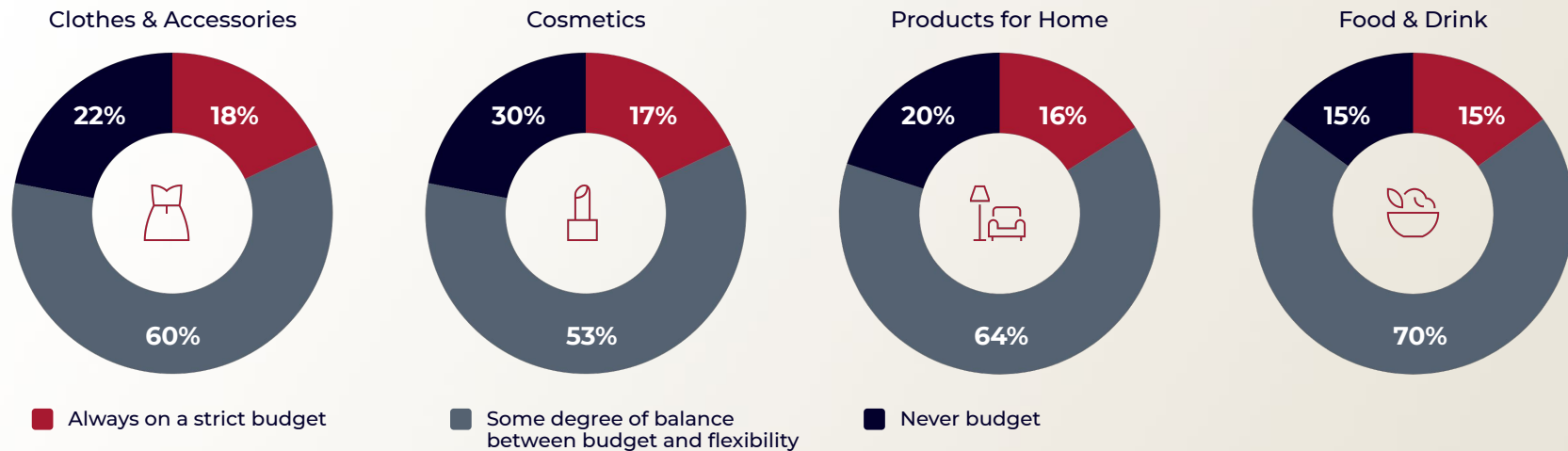
“I've got loyalty cards at three supermarkets and tend to shop at those.”

“If I buy online I use a cashback site to raise money for the school PTA”

## What's New

Heart of Britain work to a budget but also show flexibility month to month

### Ways HOB budget for purchases in the following categories

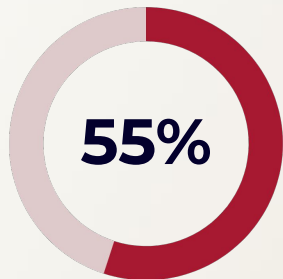
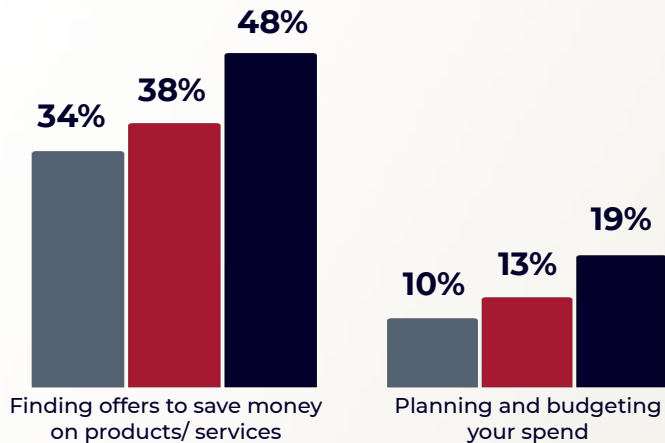


## What's New

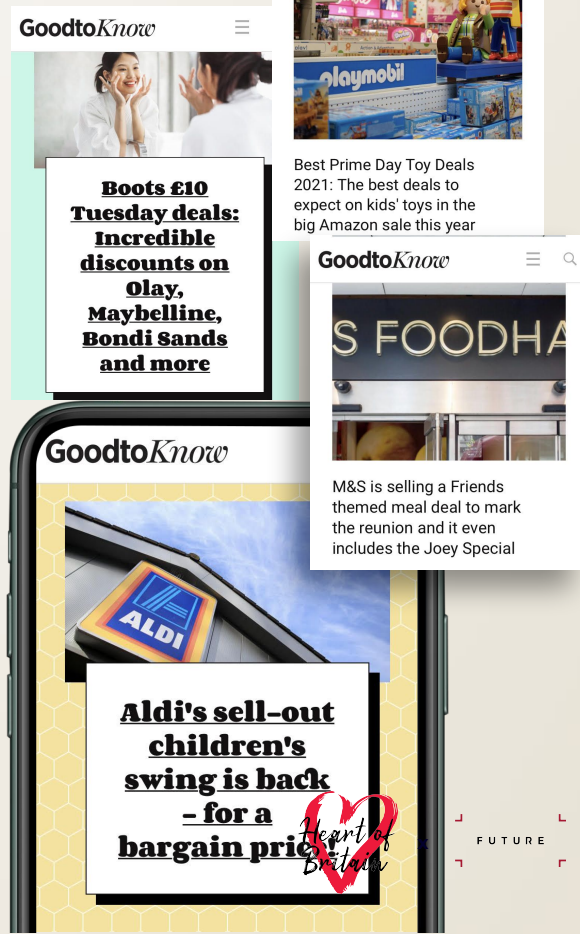
Our content helps shape their savviness

### Get help from magazines in the following areas

■ AB women readers ■ HOB women ■ Future HOB



“Magazines help me discover new products and services”



Millions of 'mainstream households'

The forgotten economic powerhouse

14m

Women

26m





Adults in family unit

£351b

Income

= The biggest single economic group



		Millennial	AB	Heart of Britain	
	<b>Groceries Spend</b>	Average Spend	£76	£84	<b>£77</b>
		Total Spend	£1.16b	£1.15b	<b>£1.97b</b>
	<b>Motor Spend</b>	Average Spend	£14,119	£20,387	<b>£13,589</b>
		Total Spend	£109b	£220b	<b>£136b</b>
	<b>Holiday Spend</b>	Average Spend	£1.8k	£3k	<b>£2.3k</b>
		Total Spend	£29.8b	£44.12b	<b>£62.9b</b>
	<b>Christmas Spend</b>	Average Spend	£272	£356	<b>£349</b>
		Total Spend	£4.46b	£5.07b	<b>£9.16b</b>

## Trading up at Christmas

# 118%

more likely than the UK average to trade-up their food and drink choices for Christmas

**STAY**  
Same supermarket but more premium products  
=  
**58%**  
more likely than UK average

**SWITCH**  
More premium supermarket  
=  
**38%**  
more likely than UK average



8 in 10 are planning to spend some lockdown savings on Black Friday/Xmas

# Bring on the Christmas Ads!

# 67%

more likely than UK average to want to see Christmas ads earlier this year

## Key Advertising themes for Christmas 2021

Getting the family together (41% HOB vs 41% UK)

All Out Celebration (36% HOB vs 29% UK)

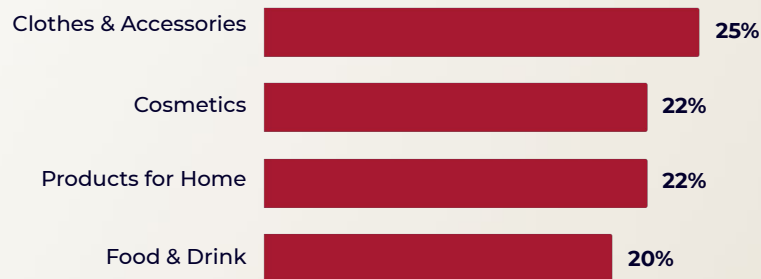
Practical Planning Tips (34% HOB vs 28% UK)





**1 in 5** claimed they will not rely on physical stores as much as before the pandemic

### Will be shopping in-store less frequently after the pandemic is over



However they are still **10%** more likely to mainly shop in store vs average uk consumer

# A reset of behaviours in food shopping

For the Heart of Britain shoppers the pandemic has changed food shopping habits for good, and price alone might be less of a focus going forwards.

## More...

... local **top up** shopping (+26%)

... intention to purchase **branded** products (+12%) and **organic brands** (+9%)

## Keep...

... **planning** most of the food shopping in advance (-1%)

...going to **larger** supermarkets (+3%) and doing a big weekly shop whether online or in store (+1%)

## Less...

...buying **reduced price** food items (e.g. close to its use-by date) (-22%)

...**waiting** to buy certain items until they are on promotion (-19%)



# Resilience | Happiness



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They are relatively **confident around their budgets.**

They are used to fluctuating incomes and **saving for big ticket items.**

They are...

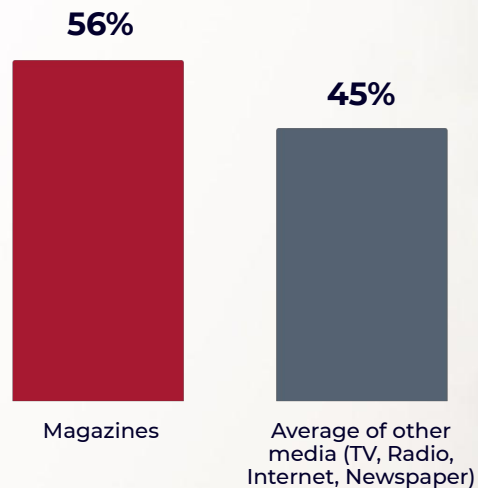
**+66%**

more likely than millennials to find it **easy to cope with day to day life**

They aren't existentially burdened.  
Every day is a privilege to live  
- **they have what *really* matters**

## What's New

Magazines put HOB in a **relaxed**  
**but focused** frame of mind



**24% more likely to feel relaxed** vs  
average of other media types





### Top Three Continuing habits

Cooking more from scratch  
**+78% vs 70% (UK)**

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Spending more time with family  
**+70% vs 70% (UK)**

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Eating healthier food  
**+61% vs 60% (UK)**



### Growing in importance (June 21 vs Sept 20)

Going on UK holidays more  
**- rising from +30% to +44%**

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Doing more beauty treatments at home  
**- rising from +33% to +40%**



### Declining in intent (June 21 vs Sept 20)

Doing more home improvements by myself  
**- falling from 48% to 37%**

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Working from home more  
**- falling from 23% to just 13%**

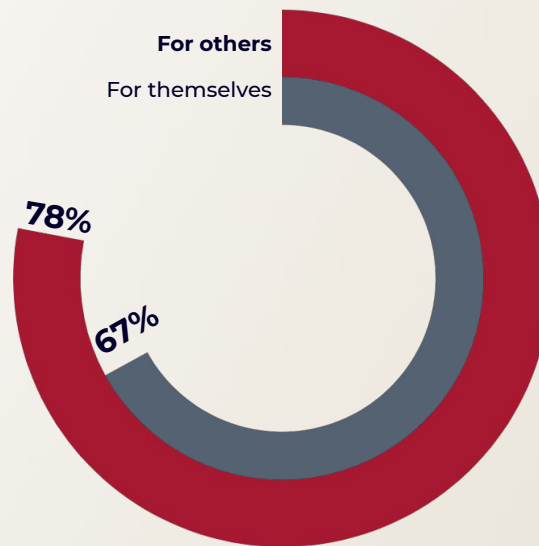
## Small things make them happy day to day

Chatting with friends and family is by far the strongest contributor to everyday happiness:



**4 in 5** said this is what contributes to their everyday happiness

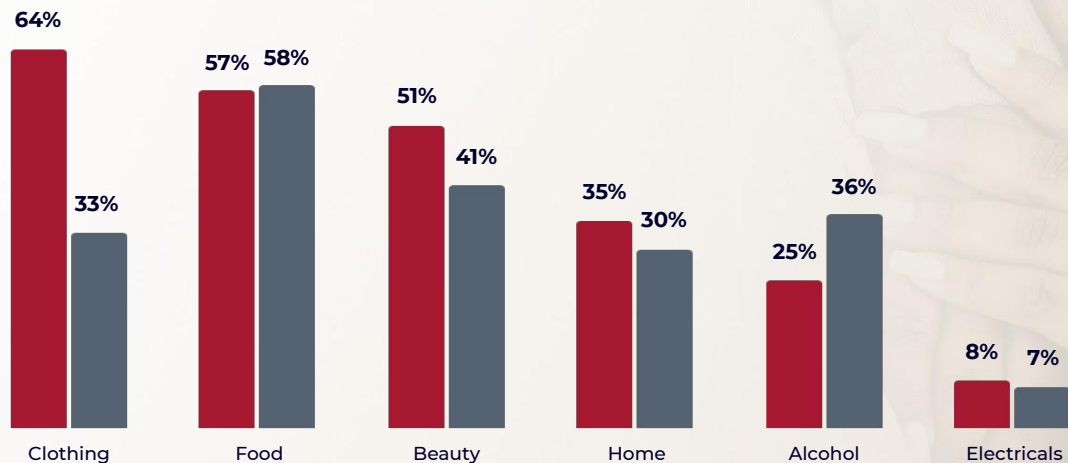
HoB women are **more likely to derive pleasure** from buying gifts for others than treating themselves:



# Gifting - for themselves and others

## Go-to categories for retail therapy

■ For themselves ■ For others



Food, beauty and alcohol brands can leverage HoB's disposition to treat others

# Little Wins

Heart of Britain take huge comfort and enjoyment from their 'Little Wins'. These are the small moments of happiness and satisfaction that they experience in their day to day lives.



Things to do with toddlers at home: 75 best activities for toddlers

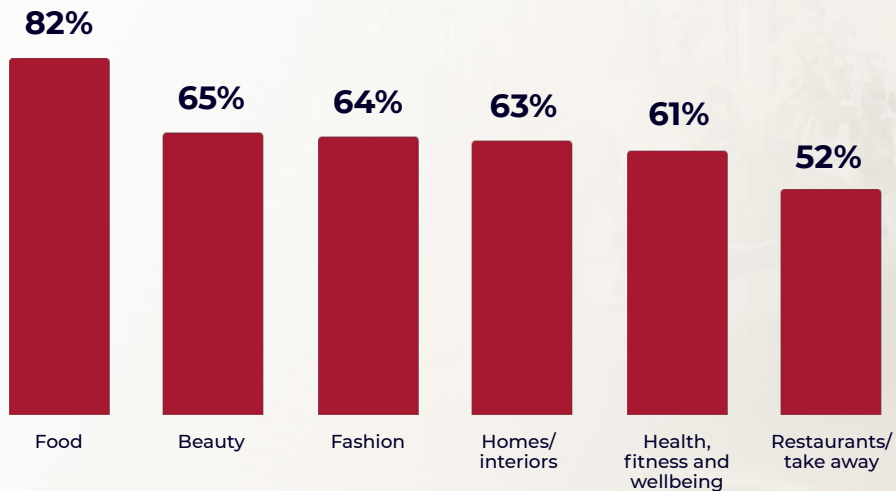
Best exercises for bingo wings: How to get rid of bingo wings at home



## What's New

Little wins are especially likely to be food-related

### Experience of little wins across categories



## What's New

Finding good products on offer  
and discovering new products  
are popular little wins

### Top little win within each category

#### Food

Discovered an enjoyable  
new food/product

**38%**

#### Fashion

Discovered a good  
new product

**31%**

#### Beauty

Found a good product  
on offer

**40%**

#### Home & Interiors

Found a good product/  
service on offer

**25%**

#### Health & Fitness

Achieved a personal goal in my  
health, fitness or wellbeing

**24%**

#### Restaurants & Take Away

Purchased restaurant/  
take away food on offer

**24%**

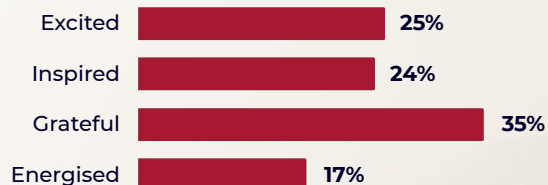
## What's New

Brands that facilitate little wins for HoB will directly contribute to their sense of happiness

# 73%

said that little wins made them feel **HAPPY** - **16%** more than for millenials

### Made them feel:



# Happiness has an impact on purchasing behaviour

# 1.6%

## incremental sales uplift

For advertising consumed in a positive vs neutral mindset.

**67%** of HOB **enjoy going shopping** (UK: 59%)

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**55%** admit that when they go to the shops in a good mood they **tend to buy more things** (UK: 50%)

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**45%** also say that they will **spend more time in the shops** when they're feeling happy (UK: 43%)

---

**2 in 5 (40%)** will **buy more premium products** when I'm in a happy mood (same for the UK)



## Heart of Britain Wave Three

This is a large, savvy, retail-led audience

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Social, charitable and environmental causes  
are growing in importance

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Her positivity is fuelled by little wins

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They are natural born influencers - and our  
content influences them





# Thank You



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# GoodtoKnow

Goodtoknow is the ultimate online destination for busy women. 40% of the audience are mums with children at home, looking for quick and easy ideas for the family. Food is a key content pillar, with its rich recipe archive being one of the most popular traffic drivers

**4.8m**  
Global Monthly  
users

**7.7m**  
Monthly Page  
Views

**863k**  
Total Social  
Reach

**2.6m**  
UK Monthly  
Users

**60%**  
ABC1

**27k**  
Newsletters

**45%**  
Visit the website  
via organic search

**75%**  
Female

**34%**  
35-54

# Our Heart of Britain Brands

Our Heart of Britain portfolio has a trustworthy audience who are main shoppers with understated strength and spending power and regularly buy their own products.

**9.7m**  
Global Monthly Users

**3.8m**  
Monthly UK Online Users

**3.2m**  
Social Media Fans

**1.5m**  
ABC Circulation



*Pets*  
**R•DAR**

GoodtoKnow

Woman's Own  
**woman**

Woman's Weekly

Pick Me Up! **chat**

**what to watch**

TV & Satellite week

**TV Times**

What's on  
**TV**



## Insight & opportunities to maximise festive revenue

# TV Christmas Doubles 2021

**On Sale:** 7th December

**Booking:** Deadline tbc

**Copy Deadline:** tbc

These magazines are a MUST HAVE in people's homes every year, and will help create a sense of normality for Christmas 2021.

- The **BIGGEST** Christmas scale in the market
- In homes from **early December**
- Referred to **repeatedly** across the festive period
- Be a part of **a family Christmas**

**Space is filling up, don't forget to book your place!** For more info, please contact [kate.jasinski@futurenet.com](mailto:kate.jasinski@futurenet.com) or your sales rep!!



**TV Times**

**395k**

Christmas double circulation 2020

**127k**

Current circulation



**1.57m**

Christmas double circulation 2020

**690.6k**

Current circulation

**TV&Satellite week**

**82k**

Christmas double circulation 2020

**77.6k**

Current circulation



# Our Women's Lifestyle Brands

We are one of the UK's leading women's lifestyle portfolios. We aim to inspire and entertain women in an approachable and lively manner by focusing on the things that matter to them.

## 15m

Global Monthly Users

## 6m

Monthly UK Online Users

## 10.1m

Social Media Fans

## 855.7k

ABC Circulation

marie claire

woman&home

Fit&Well  
Healthier, happier living

GoodtoKnow

Woman's Own

Woman's Weekly

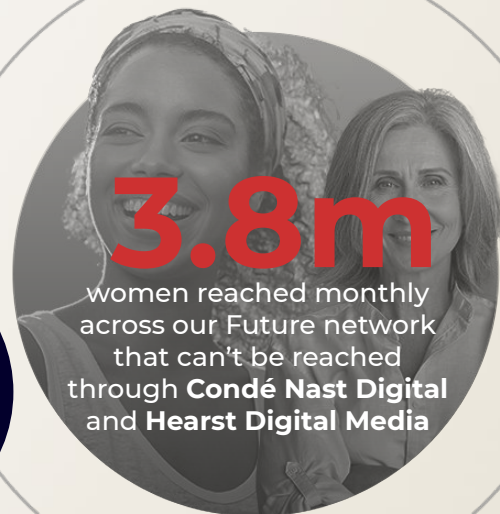
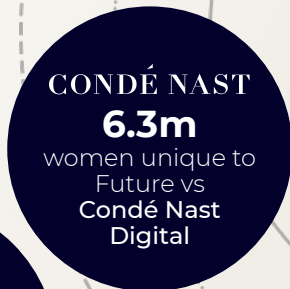
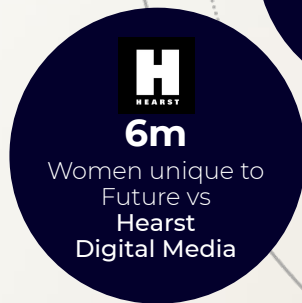
woman

Pick Me Up! chat

MY IMPERFECT LIFE



We reach a **unique unduplicated female audience** in the UK vs *Condé Nast Digital* and *Hearst Digital Media*.





Heart of  
Britain

**Heart of Britain -  
The Video**

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