Strength | Community | Influence
Recap

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

Source: TGI GB April 2021 | index vs UK average
Recap

She has a presence in multiple communities
She chooses to support causes that are closer to home or resonate on a personal level

“I prefer to support causes that I can see the positive effects of”

75%

“I prefer to support causes that are personal to me or people I know”

73%
What’s New

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...

- supports charities that tackle global issues: 17%
- supports charities that tackle local issues: 67%
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.

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)
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.

Source: “Food & Cooking”, The Lens, Future plc, UK, April 2021, N=988
Influencing those around them

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

They are natural born influencers, informers and advice givers
What’s New

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

Q19 Which of the following, if any, are reasons why you share what you have read in a magazine with others? Base: HoB women (1200)

- I feel it will interest the person I am telling: 58%
- I feel it will benefit the person I am telling: 47%
- I feel it’s information that I find interesting: 32%
- I like to let others know about important: 25%
- I feel it’s entertaining: 23%
Gathering Information - media used

Reach: Heavy Users

<table>
<thead>
<tr>
<th>Media</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITV</td>
<td>i164</td>
</tr>
<tr>
<td>MAGS</td>
<td>i150</td>
</tr>
<tr>
<td>C5</td>
<td></td>
</tr>
<tr>
<td>POP PRESS</td>
<td></td>
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<tr>
<td>C4</td>
<td></td>
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<tr>
<td>RAD</td>
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<td>FB</td>
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<td>OOH</td>
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<tr>
<td>CINE</td>
<td></td>
</tr>
<tr>
<td>INSTA</td>
<td>i159</td>
</tr>
<tr>
<td>TWIT</td>
<td>i156</td>
</tr>
</tbody>
</table>

2nd 1st 3rd
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.

<table>
<thead>
<tr>
<th>Category</th>
<th>Magazines</th>
<th>Average of other media</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food &amp; drink</td>
<td>70%</td>
<td>54%</td>
</tr>
<tr>
<td>Clothes/shoes/accessories</td>
<td>66%</td>
<td>46%</td>
</tr>
<tr>
<td>Cosmetics &amp; personal care</td>
<td>65%</td>
<td>47%</td>
</tr>
<tr>
<td>Household products &amp; appliances</td>
<td>63%</td>
<td>49%</td>
</tr>
</tbody>
</table>

Q4 How much do you trust the information you come across in/on [insert media type] about the following products/services? This could be either advertising, or other type of content where these products/services are mentioned. Min. base: HoB (710)
Tone of voice is key

All who agree with the following statements

76%

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

55%

Mags are the best media for passing on info

Q21 Top 2 - How much do you agree or disagree with the following statements? Base: HoB women who expressed a preference (670/660/761/741)
HOB are a great conduit to advertise public service messages to

64%
Will share messages designed to inform or educate the public

47%
Likely to share messages from the Government or other public service bodies

Q20 Top 2 - How likely are you to share with others the following type of content if you came across it in a magazine? Base: HoB women (1200)
There is a generational divide in how women like to recommend products.
What’s New

Retail
Influencing the Influencer

Likelihood to purchase by source of recommendation

- A friend/family member: 82%
- An expert in a relevant field: 69%
- Someone with similar background/life experience to mine: 60%
- Online review from a customer/client: 55%
- Celebrities/Social media influencers: 18%

Q23 Looking at the sources below, please indicate how likely or unlikely would you be to purchase a product or a service based on their recommendation? To the best of your knowledge, how likely or unlikely do you think your family and friends are to follow up on your recommendations to them? Base: HoB (1,200)
Savviness | Economic Power
## Recap

<table>
<thead>
<tr>
<th>Value for Money</th>
<th>Price I am willing to pay</th>
<th>Do I/ my family like or need it?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Value for Money</th>
<th>Is it the quality I want?</th>
<th>What satisfaction, pride or joy will it bring me?</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td></td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Value for Money</th>
<th>Is it a proper deal?</th>
<th>Will that deal be better elsewhere?</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

“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)

“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)

“I no longer do the weekly shop online because I know I can pick up bargains by shopping around”
(Essex)
Savviness takes many forms

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

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

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

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

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

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

“I tend to balance the number of premium and basic items in my trolley - some items are definitely worth spending extra on.”
Heart of Britain work to a budget but also show flexibility month to month

Ways HOB budget for purchases in the following categories

- **Clothes & Accessories**
  - Always on a strict budget: 60%
  - Some degree of balance between budget and flexibility: 22%
  - Never budget: 18%

- **Cosmetics**
  - Always on a strict budget: 53%
  - Some degree of balance between budget and flexibility: 30%
  - Never budget: 17%

- **Products for Home**
  - Always on a strict budget: 64%
  - Some degree of balance between budget and flexibility: 20%
  - Never budget: 16%

- **Food & Drink**
  - Always on a strict budget: 70%
  - Some degree of balance between budget and flexibility: 15%
  - Never budget: 15%
What’s New

Our content helps shape their savviness

Get help from magazines in the following areas

- AB women readers
- HOB women
- Future HOB

Finding offers to save money on products/services

- 34% AB women readers
- 38% HOB women
- 48% Future HOB

Planning and budgeting your spend

- 10% AB women readers
- 13% HOB women
- 19% Future HOB

“Magazines help me discover new products and services”

Q31 Thinking specifically about magazines you read, which, if any, of the following do they help you with?
Base: HoB women (1200), AB women (500), Millennials (500)
Recap

Millions of ‘mainstream households’

The forgotten economic powerhouse

14m
Women

£351b
Income

26m
Adults in family unit

= The biggest single economic group
<table>
<thead>
<tr>
<th></th>
<th>Millennial</th>
<th>AB</th>
<th>Heart of Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Groceries Spend</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average Spend</td>
<td>£76</td>
<td>£84</td>
<td>£77</td>
</tr>
<tr>
<td>Total Spend</td>
<td>£1.16b</td>
<td>£1.15b</td>
<td>£1.97b</td>
</tr>
<tr>
<td><strong>Motor Spend</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average Spend</td>
<td>£14,119</td>
<td>£20,387</td>
<td>£13,589</td>
</tr>
<tr>
<td>Total Spend</td>
<td>£109b</td>
<td>£220b</td>
<td>£136b</td>
</tr>
<tr>
<td><strong>Holiday Spend</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average Spend</td>
<td>£1.8k</td>
<td>£3k</td>
<td>£2.3k</td>
</tr>
<tr>
<td>Total Spend</td>
<td>£29.8b</td>
<td>£44.12b</td>
<td>£62.9b</td>
</tr>
<tr>
<td><strong>Christmas Spend</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average Spend</td>
<td>£272</td>
<td>£356</td>
<td>£349</td>
</tr>
<tr>
<td>Total Spend</td>
<td>£4.46b</td>
<td>£5.07b</td>
<td>£9.16b</td>
</tr>
</tbody>
</table>
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
What's New

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.

However, they are still 10% more likely to mainly shop in store vs average UK consumer.

Q33a/b Do you think you are likely to keep your new patterns of behaviour or revert back to pre-COVID patterns of behaviour when it comes to planning purchases/shopping in-store in the following categories? Base: HoB and varies, a minimum of 132. + Future Summer of Spending research UK, 2021
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%)

Source: “Food & Cooking”, The Lens, Future plc, UK, April 2021, N=988, HoB = 293

Q: Will you change the way you cook and shop for groceries in the next 3 months (post lockdown)?
Resilience  |  Happiness
Recap

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

Q1: Which of the following words would you say describe your frame of mind when you are performing the following activities? Base: HoB (1200)
Top Three Continuing habits

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

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

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%

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%

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

Source: Coronavirus Tracker, The Lens, FUTURE PLC, UK, September 2020, N = 1,000 and The Lens June 2021
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:
What’s New

Gifting - for themselves and others

Go-to categories for retail therapy

<table>
<thead>
<tr>
<th>Category</th>
<th>For themselves</th>
<th>For others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothing</td>
<td>64%</td>
<td>33%</td>
</tr>
<tr>
<td>Food</td>
<td>57%</td>
<td>58%</td>
</tr>
<tr>
<td>Beauty</td>
<td>51%</td>
<td>41%</td>
</tr>
<tr>
<td>Home</td>
<td>35%</td>
<td>30%</td>
</tr>
<tr>
<td>Alcohol</td>
<td>25%</td>
<td>36%</td>
</tr>
<tr>
<td>Electricals</td>
<td>8%</td>
<td>7%</td>
</tr>
</tbody>
</table>

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

Q10 What are your go-to product categories when buying treats for yourself?
Q11 What are your go-to categories when buying treats for friends / family? Base: HoB (1200)
Recap

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.
Little wins are especially likely to be food-related

Experience of little wins across categories

- **Food**: 82%
- **Beauty**: 65%
- **Fashion**: 64%
- **Homes/interiors**: 63%
- **Health, fitness and wellbeing**: 61%
- **Restaurants/take away**: 52%

Q12-Q17 Here are some examples of small moments of happiness relating to CATEGORY. Please select any that you have experienced recently.
Base: HoB and varies, depending on each category assigned to a respondent, with a minimum of 502
Finding good products on offer and discovering new products are popular little wins

What’s New

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%
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 millennials.

Q12b And thinking about these small moments of happiness, how did they make you feel? Base: HoB who were assigned the category (995), experienced at least one little win and HoB (816), Millennials (346).
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%)

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

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)

Source - Mediacom TCR 2020 and Future - The Lens, June 2021
Heart of Britain
Wave Three

This is a large, savvy, retail-led audience

Social, charitable and environmental causes are growing in importance

Her positivity is fuelled by little wins

They are natural born influencers - and our content influences them
Thank You
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

Source: Google Analytics May 21; Social Reach April 21; Comscore UK March 21.
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

Sources: Google Analytics May 2021; Social Reach April 21; ABC Circulation 2020.
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 or your sales rep!!

Source: Future Internal Records 2020
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

Sources: Google Analytics April 2021; Future Social March 2021; ABC Circulation 2020.
Our UNDuplicated Female Audience - Future

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

- 3.8m women reached monthly across our Future network that can't be reached through Condé Nast Digital and Hearst Digital Media.
- 6.3m women unique to Future vs Condé Nast Digital
- 6m Women unique to Future vs Hearst Digital Media

Source: comScore April 21, UK, Base: All Women, Audience Duplication Report [Hearst Digital Media and Conde Nast Digital vs Future Plc.]
Heart of Britain - The Video

Watch the film here