



HM Government



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Year of marketing





The Government Communication Service (GCS) is the professional body for people working in communication roles across government. Our aim is to deliver world-class communications that support Ministers' priorities, improve people's lives and enable the effective operation of our public service.

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The **Year of Marketing** is part of the wider Government Communication Service's 2020 'Raising our Standards' Programme to deliver increased capabilities in all Government Communications.



Foreword by Alex Aiken,

Executive Director for Government Communications

The world is changing, driven by new technology, political uncertainty and rising consumer expectations. These factors are shaping public perceptions and habits and will have a profound influence on the practice of marketing.

Government marketing enables people to access public services, increase the choices available and improves life chances. It is a powerful force for good using data, behavioural science and creative skills to create credible campaigns which build confidence and trust in our institutions and brands.



The UK Government defines marketing as ‘the strategic application of a range of techniques that help fulfil operational and policy objectives by effectively understanding and meeting the needs of citizens’.

Marketing programmes include research into citizen behaviour, insight generation, strategic planning, implementation of communications programmes across multiple channels, effectiveness measurement and a focus on delivering a high-quality end-to-end service and customer experience. It supports the raising of awareness of policies, influences attitudes and behaviours and aids the operation of services.

To achieve these goals in a changing world we have to radically redesign our approach to marketing. We have to grasp the changing needs of our customers, realise the potential of data and new platforms and channels. We must challenge our own organisations to align marketing with digital transformation. And we must strengthen and retain skills in our marketing teams, demonstrating our value to policy and operational colleagues.

This is the purpose of the GCS Year of Marketing; a renewal of our profession to ensure that marketing meets the challenges of the 2020s and, as it has done in the past 100 years, helps improve, save and enhance the lives of those we serve.

The future of marketing

Some things will not change

“ It took millions of years for man’s instincts to develop. It will take millions more for them to even vary. It is fashionable to talk about changing man. A communicator must be concerned with unchanging man, with his obsessive drive to survive, to be admired, to succeed, to love, to take care of his own. ”

BILL BERNBACH, FOUNDER OF DOYLE DANE BERNBACH

The fundamentals of human behaviour change at an evolutionary pace. Marketing recognises that while things may look, be consumed and seem radically different on the surface, many of the underlying motivations and drivers of people’s behaviour will remain the same.¹

The dreams, desires and needs of UK citizens will be much the same as before – for a stronger, fairer and more caring society where everyone can lead fulfilling, happy lives.²

Likewise, many of the truths underpinning effective Government marketing will remain: the importance of creativity³, the necessity of deep understanding of citizens and the crucial nature of building and maintaining a trusted relationship between HMG and the public.



Some things will change: seven broad themes

1

Society is undergoing a number of profound changes, some of which are easy to quantify. By 2025, over half the UK workforce will be from the so-called Millennial generation⁴ and almost one in five adults will be past the current retirement age.⁵

2

This changing structure of society will bring different pressures and present great opportunities. Over the last few years there's been increasing division in the UK across a broad range of topics that can be drawn across broad generational lines.⁶ Changing demographics will put pressure on a different range of services and different needs in people's communities.⁷

3

Attitudes and expectations will also change. Millennials are the digital-first generation who expect Government services and interactions to be immediate, seamless and convenient.⁷ This means that the ways in which government shares information and services will need to evolve quickly to fit the expectations of this new Millennial majority.

4

The technological revolution will continue at pace, reshaping how people live their everyday lives. By 2025 the next generation of smartphones will be ubiquitous, more capable and increasingly relied on for a host of automated tasks⁸, connecting almost the entire population to each other anywhere and everywhere. The rollout of 5G mobile will allow immediate and uninterrupted access to content, services and communication.⁹ This will further facilitate the rise of 'the internet of things' and 'smart cities' meaning that embedded sensors present in many everyday objects will collect and communicate data all around us.¹⁰

5

Working patterns will shift to become more flexible, more remote and more diverse, driven by automation of some occupations and many tasks¹¹, flexible working patterns that sit alongside other family needs and technology helping to match people's skills to jobs regardless of location and enable independent working.¹²

6

How we spend our leisure time will change. We will see the growing popularity of digitised leisure activities such as e-sports¹³, social networks and augmented reality experiences, and on-demand entertainment taking over from linear TV schedules. But we shouldn't underestimate a return to 'placemaking', the repurposing of local assets for shared and leisure use at the heart of communities.¹⁴

The rise of social networks and online news sources means that access to knowledge and opinions will be wider, broader and more diverse than ever before. However, access to unlimited information comes with the growing threat of misinformation - so called 'fake news' - which will be further exacerbated by technological capability such as 'deepfake' video editing which enables bogus videos to be created from authentic source images.

7

Driven by these changes, new challenges will emerge for government marketing and citizen engagement:

- The decline in trust¹⁵ between people and institutions will continue to be a challenge, putting strain on the traditional bonds between citizen and state.
- Response to issues and emergencies – from pandemic disease to climate change – will become increasingly globalised,¹⁶ requiring communication solutions that affect behaviour change at every level from individual to international.
- New social concerns and policy priorities may emerge as societal values, lifestyles and culture continue to change – for example, predicting, understanding and addressing growing health concerns caused by sedentary lifestyles or addictions driven by technology.

What will change for communications

As technology becomes embedded within everything, the volume of data created in every area of life will increase exponentially. Advances in processing mean that vast sets of this data can be interpreted to create genuine insight to inform, link and power every interaction.

- As more behavioural signals are collected and processed by sophisticated Artificial Intelligence and machine-learning algorithms in an increasingly connected world, data will become more predictive and allow greater understanding of people's actual rather than claimed behaviours.
- It will eventually be possible to plan every paid-for touchpoint with citizens in a programmatic way¹⁷, allowing automatic delivery of specific content to a specific audience. Combined with advances in targeting and creative development it will mean that communications will be increasingly addressable, allowing personalised, predictive and timely one-to-one conversations.

- Communications will be increasingly platform-centric, with the rise of the so called FAANGs (Facebook, Apple, Amazon, Netflix, Google). New, unforeseen platforms will doubtless emerge, bringing new possibilities but will need to be understood and adapted as quickly as citizens do.
- Emerging technology will bring new modes of communication and new ways to convey meaning will emerge and flourish, such as GIFs and emojis.

These changes throw up a host of significant challenges and exciting opportunities for keeping Government marketing at the forefront of positive change. The first step towards that transformation is outlining how Government marketing needs to respond.

“Computers can already ‘understand’ and interpret vast sets of structured data which has allowed big leaps in the precision with which we can target marketing messages measure behaviour, analyse results and predict outcomes.”

EMMA COOKSON, YOU & MR JONES

The opportunities

Change by its very nature brings great challenges, but also creates opportunities.

There are six particular areas where government marketing and communications needs to address and harness change:





The **customer experience** opportunity



The **channel** opportunity



The **trust** opportunity



The **creative** opportunity

1. The data opportunity

Every day, we create 2.5 quintillion bytes of data. To put that into perspective, 90% of the data in the world today has been created in the last two years alone – and with new devices, sensors and technologies emerging, the data growth rate will likely accelerate even more.¹⁸

20% of UK people aged 16 to 64 personally own a wearable device that connects to the internet. This is forecast to grow to 35% by 2025.¹⁹



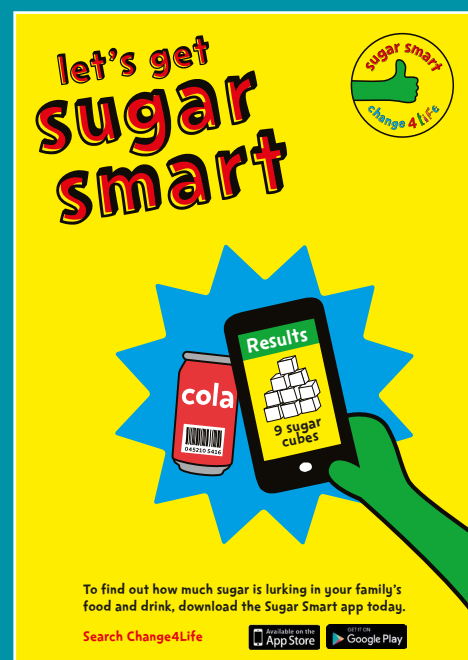
needs, helping them organise and control their business and personal admin and ultimately helping them make better choices for their general wellbeing.

Organisations and brands will harness this understanding to make their interactions with people more personalised and relevant across communications, services and product offerings. But it can only go so far – irresponsible use of personal data cannot be tolerated and so this must be done with the informed consent and for the benefit of each individual.

What the future looks like

Our world is being rebuilt by data. As smart digital devices connect and manage more areas of daily life, marketing will have access to more high-quality data than ever. This will give an unparalleled view of actual, rather than claimed, behaviour and revolutionise the way Government marketing understands and engages with citizens.

Taking control of this data will give greater capability and opportunity to citizens, making them feel empowered to self-serve, taking better care of their and their families' health



Prediction for marketing

Marketing and communications will be based on trust and consent where marketing will deliver the right level of personalised engagement as defined and permitted by the individual.

This will involve a step change in data integration capabilities, bringing traditional marketing analytics and target audience data together with other relevant government data sources, including service delivery and personal data (where permissions are in place). Government marketers will find themselves working more frequently alongside colleagues in analytical services, operational research, digital, data and technology, diversity and inclusion and other teams.

Working with multiple data sources will necessitate the use of sophisticated statistical modelling and, in some cases, machine-learning techniques to interpret the data and make it usable for informing decision-making.

Marketers will develop deeper and more powerful insight into their customers informed by myriad data sources. This will make them the knowledge centre on the attitudes and behaviours of the UK and experts on the most effective communication and intervention approaches.

These insights will power the personalisation of all communications, enriching mass-reach campaigns with more sophisticated segmentation and messaging to improve their relevance and effectiveness, while enabling hyper-targeted individual communications, where appropriate and permitted by citizens.

By applying advanced analytic techniques to such a wide range of data, covering everything from attitudes to behaviour to outcomes, marketing can provide detailed and unambiguous proof of what works, in addition to supporting wider understanding of implementing policy and societal change. Much of this evaluation will be automatic and



immediate, allowing continuous real-time improvement of all marketing programmes. As a result, communications will get better at delivering the right message to the right people in the right place at the right time, resulting in improved outcomes.

However, marketing needs to be mindful of using data to prioritise efficiency over effectiveness. Government marketing will always remain an important lever in a much bigger system of interventions to achieve these outcomes. Marketing must continue to work together with the other arms of government to understand how communication insight and approaches can complement, enhance and inform the wider objectives, and to focus combined efforts on the ultimate goals.

2. The customer experience opportunity

Nearly 8 billion digital voice assistants will be in use by 2023 through smartphones, smart TVs and home hardware. 60% of smartphone users in the UK will be using them by 2023.²⁰

What the future looks like

The increasing application of Artificial Intelligence (AI) and machine learning in personal devices will make interactions with brands and organisations more intuitive and seamless.

Everyday decisions will be influenced by and even delegated to AI. This means that brands and organisations will need to work hard to remain relevant in a world where consumers make fewer active choices. Behaviour change may become even more challenging as people's routines and habits are streamlined and reinforced and by automated AI assistants.

Brands and organisations will harness these technologies themselves. Integrated data analysis will mean they optimise individual consumer journeys, anticipating the needs of their customers and personalising their service delivery. Customer experiences will be enhanced across the lifetime of the relationship as the understanding of that customer and their preferences are continually improved over time.



This capability won't be limited to discrete, structured data such as single words and numbers, but be able to process semantic meaning from complex sentences, images, video and conversations. This will create a new revolution in understanding of genuine needs and behaviours and open up previously closed datasets to a deep new form of analysis.

“ Increasingly, computers will ‘understand’ unstructured data like images, video, language and conversation. A computer will be able to ‘recognize’ that your rash is in fact guttate psoriasis and advise you on treatment options. Or it will be able to ‘see’ the photo of the castle you want to visit, and to tell you where it is, how to get there, and other similar castles you may want to visit instead.”

EMMA COOKSON, YOU AND MR JONES

Prediction for marketing

Driven by these changes, marketing solutions will become increasingly focused on using data and emerging techniques to understand and deliver the best individual experience, and consequently less likely to default to paid-for communications.

The potential of AI and Machine Learning will step change marketing's ability to create unique and powerful customer experiences. Harnessing this potential will mean training and hiring for a more diverse set of skills and aptitudes than ever before.

Marketing will fully embrace the potential offered by new forms of consumer interaction such as voice and augmented reality, meaning that marketers will plan and design for services that work across a multitude of emerging platforms.



3. The channel opportunity



In 2019 it costs 60% more to reach half of ABC1 adults with a TV advert than it did in 2013.²¹

What the future looks like

The last few years have seen a significant shift in media consumption habits and that trend is set to continue. The broad picture of media consumption in the UK will remain recognisable, with a continued demand for a variety of long and short-form content across audio, visual and publishing formats. Furthermore, people will still want to share, read and engage with the thoughts of peers and influencers through social and digital platforms. People's media consumption will be dominated by digital and personal devices with time spent online and with screens ever increasing. However, TV will remain an important and at times galvanising mass medium – though that experience will be replicated across other devices and by 'over-the-top' services such as Now TV, Netflix and Amazon Prime Video.

Platforms and behaviours will continue to evolve, incorporating new technologies and reflecting the greater choice available. For example, the majority of paid media touchpoints – from TV adverts to out-of-home – will be bought programmatically and therefore will be able to target individuals at a granular level.

The channel with the most uncertainty in format is press. Trusted, independent journalism is essential to a functioning society and will continue to be valued, but the business model funding this will be drastically different from the paid-for print of the past. News brands have already started to adapt and evolve their product in different ways to prepare themselves for the future. For example, the Guardian ask for reader contributions to maintain an independent editorial agenda.

It is also worth reflecting on the relative youth of many of the digital and social platforms that are popular or growing in popularity today, such as Snapchat. Despite the dominance of the current crop of Silicon Valley brands, it is still likely that technological change will give rise to new platforms, potentially from other areas of the globe.

In the future, it will still be possible to deliver effective mass communications however the "channel plan" will likely be made up of a different platforms and formats to today.

Enhanced and integrated data will provide a single audience view, allowing holistic cross-channel measurement and attribution techniques to become more advanced and more insightful, helping marketers draw real causal links between communication exposures and outcomes.

“ If we focus on personalisation at the expense of broader, awareness-building advertising, then our communications will become “culturally invisible”. We need to get this balance right. So often in behaviour change, it’s not enough to communicate solely with the primary target audience – the people around them need to be aware of the messaging too. ”

KAREN BLACKETT, MEDIACOM

Prediction for marketing

Marketers will incorporate a broader blend of channels and engagement opportunities to deliver short, medium and longer-term outcomes.

This will mean embracing a shift from predominantly top-down, one-to-many communications to incorporate more peer-to-peer, many-to-many opportunities. This will include influencers and broader social mechanics.

However, marketers will continue to make best use of the ability of traditional broadcast and audio-visual channels to create an emotional connection. This will be alongside more personalised, dynamically-created one-to-one messages.

Organisations will make greater use of their owned and earned channels. Advanced marketing analytics will enable us to leverage owned channels in a more personal and

seamless way. They will also help us to identify simple and clear opportunities to empower employees and stakeholders as ambassadors. As social and digital platforms continue to emerge, rise and evolve, marketers will need to remain alert and agile in identifying where best to test, learn and prioritise effort.

‘Screen-agnostic’ strategies will be developed that allow creative ideas to be readily transferred across channels, platforms and devices. Marketers will think in terms of content and experiences rather than ‘advertising’.

Channel proliferation combined with more sophisticated audience segmentation will move us away from the one size fits all channel plan. It will allow for a more nuanced balance between traditional broadcast channels and personalised messaging by different audiences. Marketers will capitalise on the potential of individual targeting and the content revolution across all channels. This will mean investing time and talent to experiment in emerging areas to understand what works for government objectives to create the best outcomes.

Marketers will prioritise the use of owned channels and in particular internal advocates and ambassadors who can provide an identifiable, trustworthy and down-to-earth window on government. They will fully embrace this peer-to-peer communication, recognising that influencer marketing provides an essential and effective channel for many harder to reach and less engaged audiences. This will mean government being prepared to hand over the reins to a wider set of messengers.



4. The platform opportunity



In 2008 the five most valuable companies in the world were Exxon Mobil, PetroChina, General Electric, Gazprom and China Mobile.²² Ten years later they were Apple, Amazon, Alphabet (Google's parent company), Microsoft and Facebook.²³

What the future looks like

Digital platforms including Facebook, Apple, Amazon, Netflix and Google (also referred to as the FAANGs) dominate time spent online.²⁴ This has given them unprecedented access to real time and known customer-level data, enabling them to improve their product and justify their dominance.

Alphabet, Amazon and Apple have been leading the uptake of AI and voice assistant technologies in people's homes and mobile devices, alongside other hardware manufacturers including Samsung and Microsoft. It is likely that competition between these and other technology companies will continue to intensify as the uptake of home devices and AI enabled mobile devices becomes more mainstream. The dominant digital platforms will increase their ubiquity as they create connected products and services that weave seamlessly into people's lives.



Prediction for marketing

The power of the technology and audience platforms (Alphabet, Facebook Inc and Amazon in particular) will continue to grow as people continue to rely on them. However, their dominance will be restricted by their ability to win over consumer trust.

Marketers therefore will be required to develop long-term platform-specific strategies that go well beyond communications, to help them achieve their aims. This will also mean the introduction of Government roles to develop strategic relationships with FAANGs. These relationships will also deliver more effective and agile targeted marketing, enabled and enhanced by access to richer, real time data.

However, as public trust wavers around FAANGs, citizens may perceive that too close an alliance between government and audience platforms undermines trust in Government. This means that in developing strategic relationships with FAANGs, government will need to negotiate, publicise and enforce strict ground rules and hard lines.

As the competition for AI and voice dominance will continue, it will be likely that marketers will aim to be compatible with a range of systems, like the current approach to mobile app development. Marketers shall need to develop and /or recruit specialist capability in AI and voice engineering in order to fully explore these opportunities.

At the same time, it is possible for new players to emerge over the next five years, particularly in the social space. Therefore, marketers will be looking for ways to remain agile, keeping abreast of the latest trends and innovations as they are embraced by the public.

“ As online threats evolve and continue to present a danger to consumers and brands, platforms will need to work hard to earn and maintain public trust. As part of this, they will need to work closely with advertisers and regulators to ensure the highest possible standards of safety and transparency. ”

PAUL KNIGHT, MANNING GOTTLIEB OMD



5. The trust opportunity

59% [of people] are very or extremely concerned about news stories that are completely made up for commercial or political reasons. 61% agree that government should do more to separate what is real and what is fake on the internet.²⁵

What the future looks like

The last few years have seen the rise of ‘fake news’ and a decline in trust in expert opinion. General exposure to misinformation is likely to become more frequent and harder to spot as advances in software make it easy to create fake video and audio files.²⁶ This will make it harder for citizens to know who or what to trust.

Brands and organisations will need to help consumers navigate misinformation. However, to do this they must behave in ways that build trust. Misuse of personal data is a direct route for organisations and brands to erode trust. Social media companies will need to work hard to rebuild their relationship with their users as 65% of people do not trust them to behave responsibly with the data they collect.²⁷



Prediction for marketing

Trust in the advertising industry is now the lowest of all industries tracked by the Advertising Association. Favourability towards advertising has been in long term decline since the early 1990s.²⁸

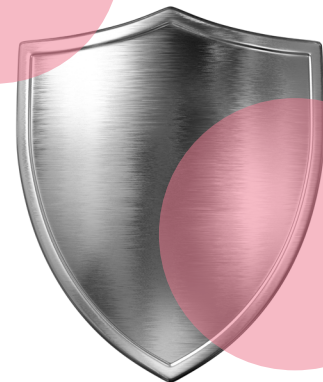
The industry is waking up to the fact that something must be done. The Advertising Association recently published a report²⁹ on addressing trust in advertising, which had five recommended actions:

- To reduce advertising ‘bombardment’.
- To reduce excessive advertising frequency and re-targeting.
- To ensure that the ASA is “best in class”.
- To ensure that data privacy matters.
- To show that advertising can drive social change.

This will mean the advertising industry and marketers in general commit to fight ad fraud, opaque digital buying techniques, unhealthy advertising, misinformation and suspicious marketing techniques as well as taking steps to actively control the ‘message bombardment’ of citizens. This will also mean finding the appropriate level of personalisation that enhances, rather than undermines trust.

“ It’s clearly essential that the government is at the heart of a trusted marketing contract. ”

KAREN BLACKETT, MEDIACOM



6. The creative opportunity

What the future looks like

With more decisions influenced and automated using technology, there will be an increased need for creative ideas that cut through and stimulate reappraisal.

Creativity will be fuelled by deeper insight that draws from multiple data sources. It will be possible to access that data at an individual level and in real time, which means that more experiences can be personalised and enhanced.

New forms of creativity will emerge as technologies such as voice assistants, Virtual Reality (VR) and Augmented Reality (AR) are used to extend and enrich experiences with brands and organisations. We will also see human and machine collaboration to stimulate new creative ideas.³⁰

Creative and design skills are likely to be in high demand as conversations and content becomes increasingly visual, incorporating gesturing (through emoji, Gifs and memes). Producing clear symbols and imagery will become even more vital in ensuring brands and organisations are properly understood.



Prediction for marketing

Marketers must renew their commitment to strong 'campaignable' ideas that capture the public's imagination, become talked about and penetrate national culture. Excellent creativity will remain a way of rebuilding favourability and ultimately trust in Government.

However, in response to the broader set of channels considered marketers must also rethink how they issue creative briefs to ensure that they generate ideas that are truly channel-agnostic.

As marketing touchpoints are increasingly digital and measurable, it will be easy to get distracted by efficiencies and short-term results.

There is a need to balance the benefits of rooting marketing activity in data with the development of great creative ideas which engender trust and emotional engagement. In addition, creative ideas must become adaptable across an ever-increasing range of formats and devices.

“ Cost-cutting and short-termism, allied with a lack of human understanding [could] mean that Governments focus on short term wins, and so become less able to influence long-term attitudes and behaviour. But the implications are more serious than in the world of commercial marketing. Ineffective strategies in the public sector could mean lives lost, for instance. ”

LES BINET, ADAM&EVEDDB



Key themes of implications for Government

1. Harnessing the data opportunity

- More effective and agile targeted marketing will be enabled and enhanced by access to richer, real time data.
- Relevant citizen data sources from marketing and departments will need to be consolidated and shared transparently to harness the full potential of programmatic advertising across a wider variety of channels.
- We shall need to develop more data-enhanced and sophisticated attitudinal and lifestyle-based audience segmentation in order to more effectively utilise personalisation engagement.
- Whilst data is a critical resource for enabling more efficient, effective government, we will continue to ensure that we are using data securely and appropriately.

2. Opportunities for more meaningful partnerships

- There will be a greater number of opportunities to create coalitions of change in order to deliver positive outcomes in the most efficient and effective way.
- Introduction of government roles to develop strategic relationships with FAANGS. However, as public trust wavers around FAANGS, citizens may perceive that too close an alliance between government and audience platforms further undermines trust in Government.

This means that in developing strategic relationships with FAANGS, government will need to negotiate, publicise and enforce strict ground rules and hard lines.

3. Recognising the importance of building trust

- Declining trust in marketing and advertising generally will hamper or make more difficult our efforts to build trust in Government via marketing.
- Our trusted brands e.g. Army, Navy, RAF, NHS, GREAT, THINK etc. are fundamental to marketing having a role in rebuilding trust in Government overall.
- Strong cut-through brands which are trusted by citizens will be critical – a ‘fewer, bigger, better’ approach to HMG brands and reduction in brand proliferation and short-term campaigns.
- The Government will need to act more proactively – and be seen to act - as a responsible marketer, e.g. by committing to fight ad fraud, opaque digital buying techniques, unhealthy advertising, fake news, as well as calling suspicious marketing techniques and be the first to control ‘message bombardment’ of citizens.
- Government marketers will need to find an appropriate level of personalisation engagement that enhances rather than continues to undermine trust.

4. Fundamental organisational redesign

- Government marketing will need to expand to embrace and develop the skills and capability to implement the full range of interventions (marketing and otherwise) that are required to deliver the full end-to-end citizen experience or journey. There will no longer be baton-passing between marketing and service delivery.
- Reframed marketing will need to be fully embedded in the design, development and delivery of citizen services and be seen to add value to this process.

Implications requiring further exploration:

- This potentially requires new, board-level functions pulling in digital, marketing, operations and programme operations function. This may result in a new role of director of citizen experience.

5. Developing new skill sets

- Marketing skills will need to be developed in-house to experiment, test and learn in real time and then to prioritise speed over perfection.
- Data analysts will need to be an integral part of our departmental marketing teams rather, than as they are currently, a detached and/or outsourced function.
- We shall need to develop and/or recruit specialist capability in AI and voice engineering in order to fully explore these opportunities.
- We need to create the right environment to attract the best private-sector talent.

6. Developing an advisory board

- Keeping abreast of the pace of change and recognising what constitutes marketing best practice will require greater engagement with the commercial sector.

Implications requiring further exploration:

- An advisory board made up of senior marketing industry figures could help identify trends and principles.
- Such a board would also bring a dose of realism to avoid gimmicks and glitches.
- Help avoid falling into the trap of over-reliance on data and technology – through positivity, ideas, proactivity and thought leadership.
- Ensure effective use of taxpayers' money and government resources.



Endnotes

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