

The Assault on Pleasure

**How the marketing /
communications community should
review and respond to modern
attempts to regulate or restrict
consumer enjoyment of brands and
products**

1. Introduction

- The Future Foundation is seeking to assemble a consortium of companies/organisations to fund ground-breaking research into the '*Assault on Pleasure*'
- We believe that the Assault on Pleasure – the trend towards the restriction and regulation of individual indulgences and pleasures – is one of the defining features of today's consumer markets
- An understanding of its current dynamics and future direction will give companies an important competitive advantage in future

2. The Premise

- Companies in fmcg / food & drink / hospitality & entertainment/ travel / mobility / healthcare / media & communications / marketing services... all face a political and cultural environment in which, for possibly the best of reasons, powerful forces can be motivated to constrict individual choice and control personal responsibility.
- Concern about the nation's health (physical and moral) or about the ecology is driving a) an ever rising inventory of bans and restrictions and b) a new distribution of guilt (so many urgings not to do things, not to *indulge*).
- Highly pro-active and professional lobbies + pressure groups press single-issue agendas on government and regulatory bodies. Many have been very successful. Very few ever disappear whatever changes in the law or behaviour have been won by their campaigns. There is a world of permanent regulatory incrementalism.
- Products / brands with an indulgence dimension to their offer are thus put on the defensive: often a defining feature in their corporate communications, CSR, marketing and advertising, new product development...
- There is no evidence of a libertarian groundswell or backlash within public / political debate: though there are exceptions, it seems to be a default instinct of our modern political machinery to intervene / discourage / outlaw. And so, the whole marketing mix is exposed: pricing, promotions, advertising, point-of-sale...

2.1 The sub-premises

- Every consumer-citizen has medium-to-pronounced opinions about how society should be run and regulated. (Every newspaper, everyday, carries at least one story of a new threat to our eco-social welfare. It is as hard for the consumer-citizen not to be opinionated as it is hard for him/her to be fully informed).
- Excess in personal consumption is always objectively dangerous.
- No-one actually approves of obese, zombified children or selfish behaviour on the roads / in pubs or wanton spoiling of the environment...
- In light of the above, many of the new regulatory measures of the last few years will have found approval with many people.
- It is no cynicism to say that public attitudes must generate contradictions: we may well want to ban what we abhor; we may well fight to retain what gives us pleasure.

- Deep suspicion of powerful companies and big brands drives a general public intuition that, as they care only about profits, greater control of their activities - especially in the field of consumer goods - is probably the right course to pursue.
- **What should concern the commercial strategist is not just the dynamic of regulation in his/her own market but the general culture of political or moral interventionism within the consumer society.**

3. Our existing research/insights on this topic

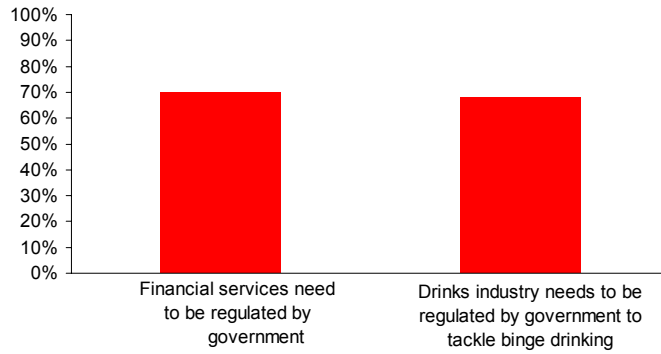
- The Future Foundation has already conducted a great deal of research on this and related topics and has developed a number of insights
- The following sequence of slides presents just a selection of these
- They illustrate:
 - Some of the consumer trends driving the assault on pleasure
 - That consumer support for regulation (in general) is strong and widely based across socio-demographic groups
 - That trust in innovation and new technology is under pressure in this new environment
 - The mixed feelings that consumers have over the balance of individual, corporate and governmental responsibility for these issues
 - How the impulse to protect and restrict children is particularly intense
- Our research programme would aim to develop and build on these existing insights

3.1 Key components of The Assault on Pleasure

- More individualism – declining faith in institutions
- Less fatalism – ‘Victim Culture’
- More information – but less of it mediated by ‘real experts’
- A ‘conservative’ rejection of many product innovations – especially those involving new technology
- Many consumers think and behave irrationally

Strong support for regulation

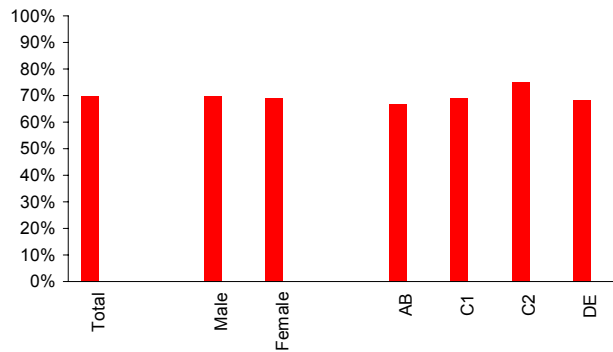
Proportion of individuals who agree that “the financial services industry and drinks industry needs to be more tightly regulated by government”



Source: ICM/Future Foundation 2004
Base: 701 respondents financial services/684 respondents drinks industry

Broadly based support

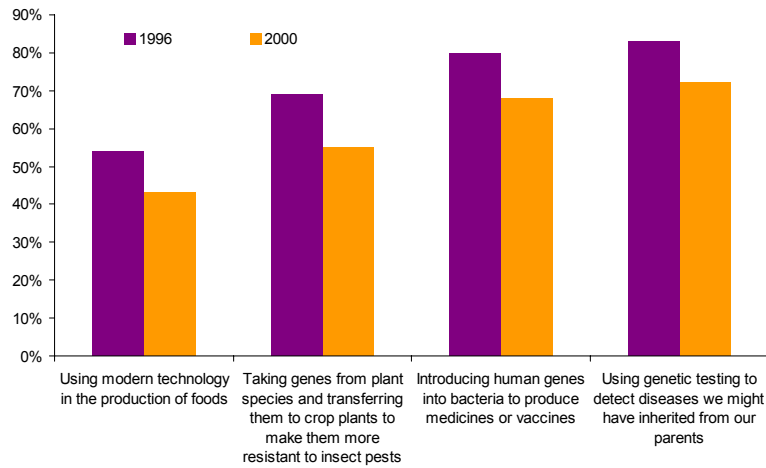
Proportion of individuals who agree that “the financial services industry needs to be more tightly regulated by government”



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Declining faith in biotechnology?

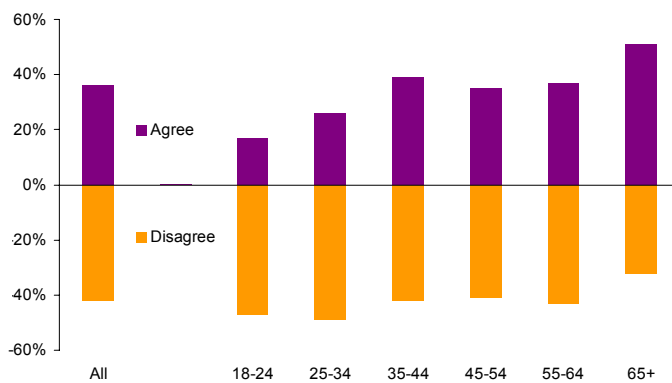
Percentage of Europeans mostly or totally agreeing that these applications are useful



Source: Eurobarometer/nVision

Most consumers do not blame the food industry for obesity

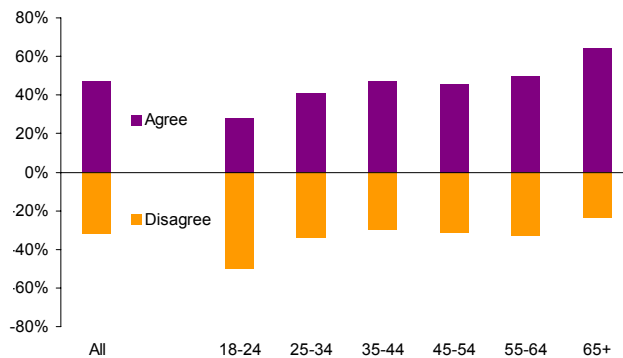
% agree/disagree with the statement 'Food companies are responsible for the increase in people with weight problems' by age



Source: The Future Foundation Base: 1001 adults 16+, UK, 2003

However, most adult consumers do not want advertising to children

% agree/disagree with the statement 'Food companies should not be allowed to advertise to children' by age



Source: The Future Foundation Base: 1001 adults 16+, UK, 2003

4. Questions to be addressed

- How should the **assault on pleasure** (its origins, its mechanisms, its impacts) be understood by those whose products offer a pleasure pay-off and, as a result, are in the political line of fire?
- Must the **assault on pleasure** grow as a cultural phenomenon to the point where it restricts market growth or depresses sales - in ever more markets?
- Sector by sector, most companies will now urge customers to drink / eat / drive / behave ..."responsibly" in relation to the products they sell them. Can this approach reach the point where companies are effectively collaborating in market decline? (Of course, no-one should drink alcohol to excess - but what has this to do with *Glenmorangie*? No-one should eat too much chocolate - but what has this to do with *Twix*? No-one should drive recklessly - but what has this to do with *Range Rover*?).
- If the **assault on pleasure** is now a living reality, what should brand-owners and their marketing support agencies be doing about it?

The regulatory itch

Some pursuits which recently been made illegal or restricted or culturally discouraged.

- Smoking in bars / sports stadiums.
- Hunting with dogs.
- Using handguns for sport.
- Driving into cities.
- Driving 4 x 4.
- Sunbathing.
- Watching sex on television.
- Giving sweets / crisps / chips / cola to children.
- Eating hamburgers / tuna / veal / salt / cereals /sausages.
- Selecting cod or salmon for dinner.
- Snacking.
- Drinking full-strength coffee.
- Buying a home in beauty spots.
- Letting children play computer games.
- Using a mobile phone.
- Driving at 30mph.
- Wearing fur.
- Drinking more than small amounts of alcohol.
- Going on holiday to environmentally sensitive places.
- Sending children on adventure holidays.
- Going to a "happy hour".

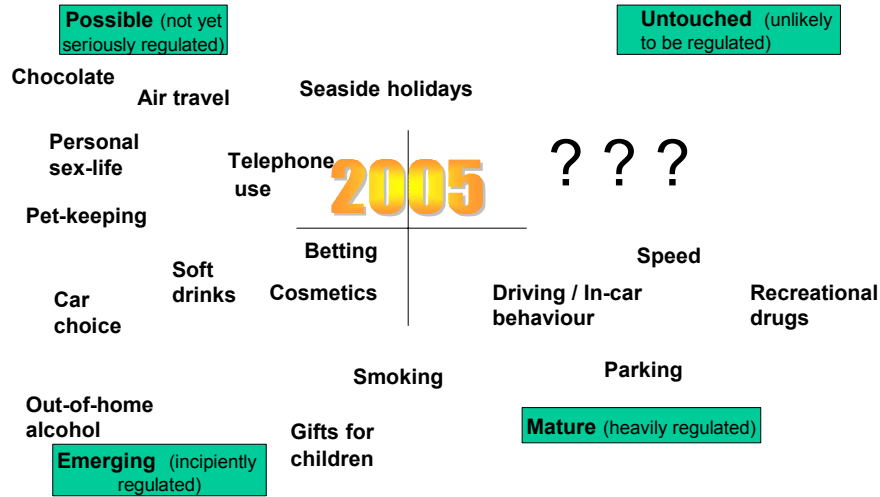
So much product positioning is based on the concept of *legitimised indulgence* : ie that an occasional or even a daily treat does no harm and is merited by all the various strains of life.

What must happen to this commercially valuable idea as/when treats are deemed either socially dangerous or culturally unacceptable?

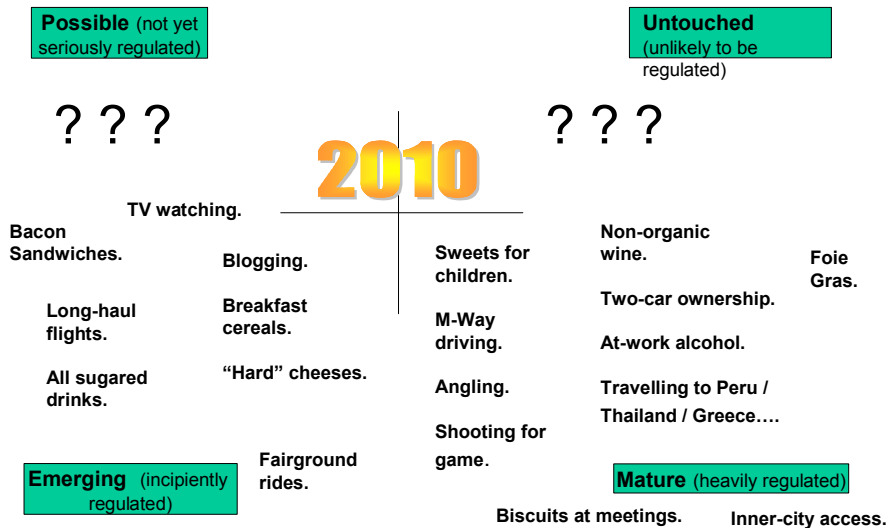
5. The research programme

- A specially quantitative market research exercise: exploring the range/intensity of public opinion about a) restrictions to their personal enjoyment and b) the role of legislation / banning. This will address specific market sectors and test public interest in / support for possible new interventions from government.
- A series of focus groups designed to assess a) how opinions form and grow about threats to health / the environment / children's welfare and b) how response-options (expecting the government to ban / agreeing to live-and-let-live / supporting personal restraint or self-discipline over political control...) travel through public/personal attitudes.
- A programme of expert interviews among marketeers, trade bodies, regulators, politicians, lobbyists, journalists and other opinion formers
- A forecast of the future of regulation in the UK based on a) trends in policy-formation in political parties and think-tanks b) the priorities of pressure groups c) the role of international influences (policy patterns in opinion-leader countries and institutions such as the EU, WHO...) d) movements in scientific opinion (about what causes harm to humans and the eco-system).
- An assessment of the range of reactions open to sectors, companies and brands - leading to a set of strategic insights for marketing and communication planning.

The regulatory status of “pleasure” markets and behaviours : a schematic vision 1.



The regulatory status of “pleasure” markets and behaviours: a schematic vision 2.



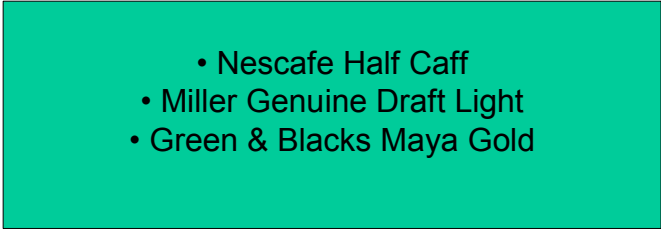
5.1 The Assault on Pleasure: how brand owners can respond...

- **Product innovation:** recognising the pressures faced by the consumer to compromise personal pleasure.
- **Service ideas:** assisting the consumer towards balanced pleasure-behaviour.

- **Corporate postures:** showing all stakeholding constituencies that consumption excess is not being encouraged - at the same time as indicating to customers that their personal indulgence is mitigated through the CSR / good works of their chosen brand.

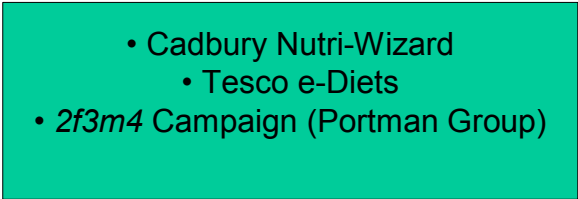
The Assault on Pleasure: how brand owners can respond....

- **Product innovation** : *recognising the pressures faced by the consumer to compromise personal pleasure.*

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- Nescafe Half Caff
 - Miller Genuine Draft Light
 - Green & Blacks Maya Gold

The Assault on Pleasure: how brand owners can respond....

- **Service ideas** : *assisting the consumer towards balanced pleasure-behaviour.*

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- Cadbury Nutri-Wizard
 - Tesco e-Diets
 - 2f3m4 Campaign (Portman Group)

The Assault on Pleasure: how brand owners can respond....

- **Corporate postures** : *showing all stakeholding constituencies that consumption excess is not being encouraged - at the same time as indicating to customers that their personal indulgence is mitigated through the CSR / good works of their chosen brand.*

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- McDonald's Football Coaching
 - The Diageo Foundation
 - Disney Hand

6. Outputs from the programme

- All research materials will be made available to consortium members via presentations at the conclusion of each phase of research
- We would consider asking private questions for individual consortium members (depending on demand)
- A final report for all consortium members (possibly with a published version for PR purposes – depending on demand)
- Workshops for consortium members to identify specific action points and implications for each individual member organisation

7. Benefits of participation

- The project will provide authoritative insight into the future dynamics of the assault on pleasure
- In particular, we will focus on the consumer response to increased restriction and regulation of pleasure
- The findings of this study will provide a vital input to strategy, planning and investment decisions and assist in the exploitation of opportunities presented by the assault on pleasure

- The study will establish participants as thought leaders in this area and offer the opportunity for brand building with a range of stakeholders
- Consortium members will have the opportunity to shape the content and direction of the study

8. Costs, timing and personnel

We will recruit between 5 and 8 non-competitive member organisations on a first come first served basis.

Each member will pay a fee of £15,000 plus vat.

Project timetable as follows:

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|----------------------|--------------|
| • Recruit members | March 05 |
| • Research programme | April/May 05 |
| • Final report | June 05 |
| • Member workshops | June/July 05 |

The project would be led by Paul Flatters (Chief Executive, Future Foundation Group) and James Murphy (Founder of Model Reasoning and Future Foundation Associate).

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