
TGFT7: An Inspired Generation?

The Effect of the 2012 Olympics on UK Consumers



Introduction

The London 2012 Olympics have been hailed, since they began at the end of July 2012, as a key factor in the UK's return to economic growth,¹ as '17 days that may have changed this country',² as an event that has ended patriotism as 'a source of toe-curling embarrassment'³ and as a broad sporting and cultural event that has the potential to 'inspire a generation'.⁴ This latest Trajectory, powered by insight from Trajectory's bi-monthly Global Foresight service, examines what effect, if any, the Olympics has had on the values and attitudes of UK consumers.

The potential to boost the national mood and 'inspire a generation' is of huge significance to brands as an opportunity to lift the economic gloom and increase take up of sport and attendance of sporting events. However, while

¹ <http://www.bbc.co.uk/news/business-20080263>

² <http://www.guardian.co.uk/commentisfree/2012/aug/13/london-2012-olympic-games-legacy>

³ <http://www.telegraph.co.uk/sport/olympics/9538459/Olympic-spirit-of-2012-can-reverse-Britains-national-decline.html>

⁴ <http://www.independent.co.uk/sport/olympics/comment/roger-black-inspire-a-generation-mission-accomplished-8120082.html>

the UK's return to growth in Q3 appears to have been in part due to the Olympics, the results on the consumer population have been mixed, with the games having a palpable and positive effect on some consumers, while failing to lift the prevailing gloom for others.

Positive and Negative

During the Games themselves, there was a widespread perception of a rise in national mood, and this is borne out, in one respect, by the data showing an uplift in national pride. In April 2012, three months before the Olympics began, 30% of UK adults reported that they were 'very proud' to be British. After the Games, in August 2012, this had risen to 35% - a notable increase, and the highest figure recorded by Trajectory Global Foresight since May 2011 (just after the wedding of Prince William and Kate Middleton). There were also slight changes in wider social values; the proportion of people believing that ethnic diversity 'enriches life' (as opposed to 'eroding national unity') rose from 53% to 57% (the highest figure since June 2011).

The Olympics also acted as a powerful and pervasive platform for promoting equality – through the participation of athletes like Sarah Attar, who became the first female track and field athlete to represent her country, Saudi Arabia – or through the unprecedented success of the Paralympic games, which showcased, to a global audience the abilities of disabled athletes and competitors. Between April and May there was also a shift in attitudes towards gender equality. Overall, the proportion of people believing that men make better political leaders than women declined from 27% in April to 21% in August (the lowest recorded by Trajectory Global Foresight in the past two years); and the proportion believing that, when jobs are scarce, men should have more right to a job than women declined from 13% to 10% in the same period (again, the lowest recorded in the past two years). These changes were concentrated amongst the two younger age groups, those aged 18-34 and 35-54, and serve to translate the ephemeral positive atmosphere of the Olympics into visible changes in consumer values.

The changes in national sentiment and consumers' view of ethnicity – which might be taken as positive ones – were not universal. Throughout the summer, consumer confidence fell nationally (from 21% to 15%). There was no discernible effect on happiness from the Games, and all aspects of satisfaction either declined or did not change on their pre-Olympics level, most notably, the proportion of people who enjoyed a high level of life satisfaction dropped from 50% in April to 46% in August. Life satisfaction itself is an incredibly stable measure (on seven occasions in the past eight waves of Trajectory Global Foresight, the proportion of people with a high level of life satisfaction has been within 1% of 50%).

Table 1: Pre and post Olympic level of Optimism, Satisfaction and Pride

Indicator	April 2012	August 2012	'Olympic effect'
% believing the national economy will improve in the next 12 months	21%	15%	-6%
% believing their household finances will improve in the next 12 months	22%	20%	-2%
% with a high level of life satisfaction	50%	46%	-4%
% with a high level of job satisfaction	37%	29%	-8%
% with a high level of satisfaction with their social life	39%	35%	-4%
% with a high level of satisfaction with their family life	63%	59%	-4%
% who are 'very proud' to be British	30%	35%	+5%

Source: Trajectory Global Foresight 2011-12 (4,538 UK respondents)

Not all of the changes in the above table are statistically significant – in some cases, the fluctuation is very minor. In itself this is interesting – although hailed as a potential panacea for the UK's problems, in many cases, early indications are that the Games have had no effect at all.

The stagnation or decrease in satisfaction and economic pessimism is not likely to be a direct result of the Olympics, but is instead a sign of how these indicators declined even during a 'once in a lifetime' sporting and cultural event. The Olympics were not, of course, specifically tasked with lifting the gloom economically – although they are thought to have accounted for most of the UK's GDP growth in Q3. One of the expected outcomes of the Games was an increase in sports participation and interest – however, early indications are that, for the most part, this has not materialised.

The proportion of people who list 'watching a live sports event' rose just 1% between April and August (not a statistically significant change), and the proportion who 'participate in a sport' did not deviate from the average for the last two years – 30%. Of those who did watch live sports events, the proportion doing so frequently (once a month or more) declined by 5%, from 45% to 40% between April and August (with a 2012 average of 43%). Although

the vast majority of the population were interested enough in the Olympics to watch it on TV,⁵ for most people, this did not translate in active participation in actually playing sport or watching it live.

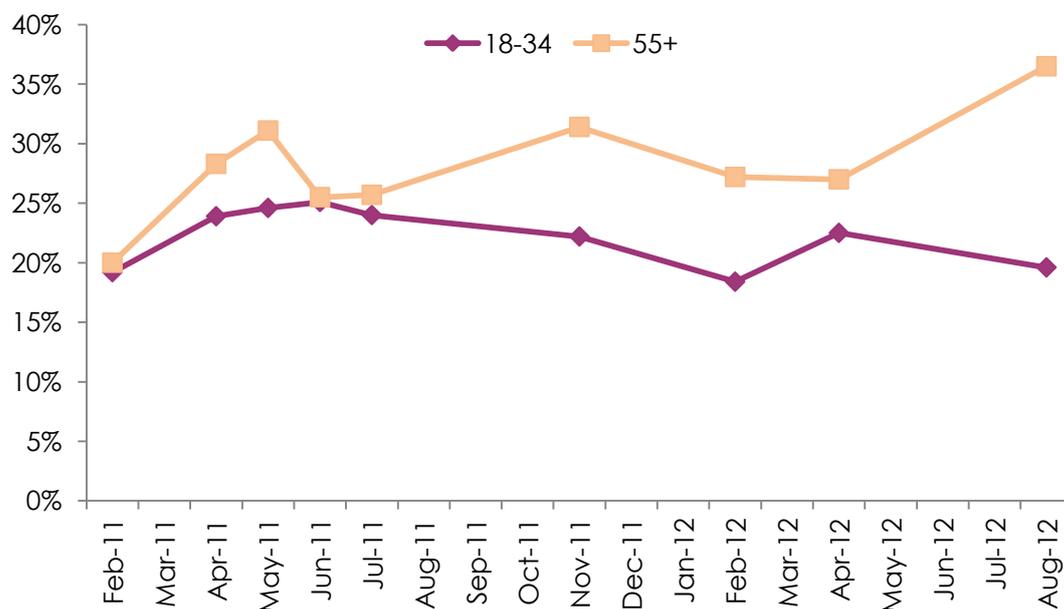
An Inspired Generation

For the nation as a whole, the 'Olympic Effect' was one of genuine interest in the televised event, and a spectacular advert for both Britain and for values of inclusivity and tolerance, but not one sufficient to immediately elicit higher levels of active participation in sport, nor one that consequently lifted the gloomy national mood. This is especially true of consumers aged 18-34.

As with the UK overall, younger consumers' national pride rose – from 26% 'very proud' to be British in April to 33% in August (also a rise on the 2011-12 average of 27%). Amongst this younger age group there was also an increase in the proportion agreeing that leisure is 'very important' to them. Despite these rises, the number of 'positive' changes in this period is very limited, and the figures around sports participation for this group are even worse than the figures for the population as a whole. Between April and August the proportion listing 'participating in a sport' dropped 10%, although there was no change for the proportion who 'watch a sports event live'.

As well as this lack of increased sports participation, consumers aged 18-34 suffered the biggest fall in consumer confidence (although the lowest overall score is for the 35-54 age group) and the biggest fall in life satisfaction (from 44% with a high level of life satisfaction in April to 36% in August). 18-34 year olds also suffered a 3% fall in happiness, the only age group to experience a drop at all. Once again, this change is small enough to suggest that there may have been no change at all – but this *lack* of 'Olympic effect' is interesting in itself. For many younger consumers, their experience of the Olympics – although potentially very positive – was not enough to dispel wider negative factors that over time, negatively affect happiness and wellbeing. Across many indicators, younger consumers have been in decline throughout 2012, and the Olympic summer was not enough to reverse this trend. Any positive 'Olympic Legacy' was by its nature not likely to be immediate – but the first indications are not encouraging.

⁵ <http://www.bbc.co.uk/mediacentre/latestnews/2012/olympic-viewing-figs.html>

Chart 1: % of people aged 18-34 or 55+ in the UK who feel 'very' happy

Source: Trajectory Global Foresight 2011-12 (4,538 UK respondents)

However, not every age group ended the summer more dispirited than they began it, as the chart above shows. Indications from the data on happiness are that a generation was inspired by the Olympics – but perhaps not the generation that was anticipated. Although consumers aged 35-54 experienced similar declines in confidence, satisfaction and active participation in sport, older consumers (aged 55 and above) were notably less likely to feel the same. For older consumers, the proportion who reported themselves to be 'very' happy rose by 10% to 37% (and well up on the average of 28%) and the proportion who listed 'participating in a sport' as one of their leisure activities also rose, from 16% to 19% between April and August (although this is only slightly above the 2012 average of 18%). Although consumer confidence dropped for older consumers, it did so by a lesser amount than any other age group – just 2%.

The Games also had a notable effect on wider social values of the over 55s – more so than any other age group. The over 55s saw the biggest rise in the proportion agreeing that 'ethnic diversity enriches life' – from 37% in April to 50% in August (and slightly up on the 2011-12 average of 45%). The most dramatic effect of the Games on the wider values of a consumer group was in the reshaping of older consumer's view on global poverty, as the chart below demonstrates.

Chart 2: % responding that global poverty is a bigger priority than national problems



Source: Trajectory Global Foresight 2011-12 (4,538 UK respondents)

For other generations, the Games were not enough to lift the economic gloom or cause a notable change in their wider values. For the over 55s – often (and possibly inaccurately) pigeon-holed as socially conservative, a genuine shift occurred – not just in terms of an uplift in mood or national pride, but in terms of wider cultural and social values. The prevailing social and financial pressures that have caused falls in happiness, satisfaction and confidence are not replicated in the figures detailing the experience of the older consumer age group.

Conclusion

The data within this Trajectory has indicated a significant divergence in experience of 2012 across age groups, with the Olympics having a very mixed effect on different consumers. A significant change – and not a positive one – is that of a decline in sports participation amongst younger consumers – which correlate to declines in happiness and satisfaction. This negative change is not the result of the Olympics, but in spite of their appeal.

For one consumer group – perhaps one less directly affected by wider financial pressures – the Olympic Summer saw a marked increase in national pride, happiness, sports participation and a significant effect on wider social values – surely the definition of ‘inspiring a generation’. Trajectory Global Foresight will continue to monitor the effect the Olympics had on the over 55s and whether or not this positive effect can be maintained in future months –

and whether, as the economic gloom slowly lifts, if the impact of the Olympics can be extended to other generations. At this stage, it is clear that the Olympics have been successful in inspiring a generation – the over 55s.

This Trajectory is driven by data and thinking from Trajectory's Global Foresight service (TGF) which covers 20 countries. The service provides analysis on the trends driving consumer and citizen behaviour - what they are, why they are important and where they are heading. All of the content is supported by research amongst over 40,000 people per annum.

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