



Ipsos MORISocial Research Institute





Imagining 2040

Research questions and focus

What do we want our cities to be like in 2040?

What opportunities do new technologies offer? How do these play off against the challenges?

Who are the winners & losers in different future scenarios?

What opportunities does this create for UK businesses to innovate?

With focus on six city systems:

Waste

Health

Water

Energy

Food

Transport

Integrated into three scenarios



Gathering citizen voices

Extended citizen engagement through 12 hours+ discussion

Face-to-face citizen dialogues

- 3 events: London, Glasgow & York
- ~25 citizens at each
- 6 hours per event
- Introducing the systems

January 2016

Online community

- Dialogue participants + 350 members of the public
- 3 forums
- 3 questionnaires

4 weeks Feb-March

Reconvened dialogue

- 61 return participants from first dialogues
- Held in London
- 6 hour event
- Integrating systems into future city scenarios

February 2016



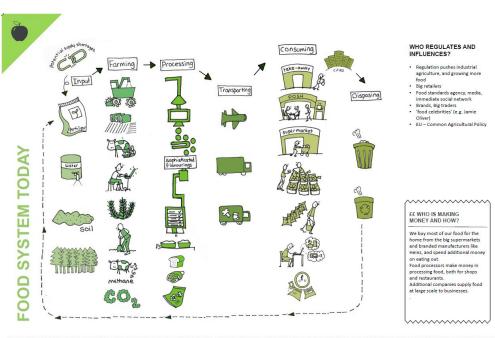
Bringing the systems to life

Moving citizens from today's process to tomorrow's technologies

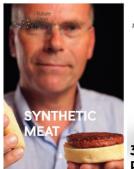
Dialogue participants discussed:

- 6 city systems
- 3 integrated future scenarios
- 10 technologies

Here is an example of how city systems might evolve in the future through technology



Future Challenges: Using too much water, polluting soil and water, using fossil fuels, carbon dioxide and methane gas emissions, overuse of antibiotics in animal feed. Our system is vulnerable to supply shortages e.g. in droughts.







3D food printing at home



Key principles for the vision of future cities

Key values emerging from citizen discussions of urban futures

Equality of access to services

Encourage social interaction

Grass roots innovation

Secure & reliable technology

'Natural' food

Avoid loss of basic skills

Local governance but central oversight

Support art & culture

Efficient use of resources

Allow for individual choices

Most important principles for citizens



Key principles underpinning urban life

Key values emerging from citizen discussions of urban futures

Equality of access to services

Local governance but central oversight

Grass roots innovation

Efficient use of resources

'Natural' food

No citizens left behind by lack of access to technology or resources Local decisionmaking but government oversight, particularly around health Use innovation to spark community projects & resource sharing

Renewable energy and waste reduction and re-use to protect environment

Avoid losing naturalness of food, and keep its social and cultural aspects

Key principles for use of technology

Key values emerging from citizen discussions of urban futures

Avoid loss of basic skills

Use technology to make life easier, but avoid losing skills e.g.

cooking

Encourage social interaction

Use technology
to aid efficiency
but not to
replace all faceto-face
interaction

Support art & culture

Use innovation to support art & culture, not just productivity & efficiency

Secure & reliable technology

Data sharing can offer tailored services but needs to be secure

Allow for individual choices

Smart devices
can encourage
positive
behaviour but
allow 'nudges'
to be ignored

So what does the future look like?

Three future city scenarios illustrated potential system integration

Devolution Revolution

Greater Harchester

Strong regional government & city-led decision making



Repair and Share

Little Langbrook

Local management & community initiatives



High Tech, High Choice

Market Newton

Strong private sector with focus on technological solutions





And what do citizens think of these futures?

Devolution Revolution favoured; High Tech, High Choice less so

Devolution Revolution



Repair and Share

Per Everyone has to pull their weight. There would be a feeling of discontent towards those that couldn't contribute e.g. the elderly or disabled. ●●



High Tech, High Choice

I'm not entirely sure what the role for humans is in this world.



Devolution Revolution



Future scenario:

- Strong regional government & cities have power to raise taxes and deliver services in social care, health and transport: each city seen as just one 'system'.
- National government has invested in regional areas and oversees national infrastructure.
- Advanced technology used e.g. remote health analytics.
- Desirable behaviour encouraged through interventions such as subsidises (e.g. reduced cost fruit and vegetables) and 'nudges' (e.g. heating systems remind people to turn temperatures down).

Citizen response:

- ✓ Balances local decision-making with government oversight
- ✓ Seems the most equal as national government holds the regions together
- Resource efficiency through use of technology.
- ✓ High taxes in this future acceptable if for example guarantees a good quality transport service...
- X ...although scepticism this could be the case
- X 'Nudging' towards socially optimal behaviour invasive - assurances were sought by citizens that nudges could be ignored or 'switched off', maintaining citizens' lifestyle choices



Repair and Share



Future scenario:

- Centred on strong & cohesive urban neighbourhoods & councils, with locally-led planning and service provision (e.g. water, energy).
- Many systems run through community initiatives, e.g. car-pooling services, promotion of recycled products from community waste.
- Wearable tech data shared with health providers and healthy behaviour rewarded.
- As communities rely on their own resources there are differences in access, quality & cost of food & energy

Citizen response:

- ✓ Strong sense of community working together for collective good – high social interaction
- ✓ Highly localised innovation gives ownership
 and generates benefits for local citizens
- ✓ Sustainability at core of economic & governance models
- X Community aspect appealing, but unrealisticand utopian risk of free riders
- Individuals unable to contribute or naturally resource-poor communities could be left behind
- X Communities too closed off from trading goods & skills, inhibiting culture
- X Productivity more valued than fun & socialising



Ipsos MORI Social Research Institute

High tech high choice



Future scenario:

- Small public sector lower taxes, with services provided by private high tech companies, who receive data shared via wearables to enable targeted services.
- Government covers most basic services, but those who can afford it pay for higher-end products & services.
- Food is functional, focused on nutrition & convenience: cooking replaced by delivery & 3D printing.
- Health monitored by nanobots in the bloodstream for those who can afford expensive treatments.

Citizen response:

- ✓ Resource efficiency & service delivery achieved through advanced technology e.g. for travel and resource use.
- X Risk of inequality through dominance of private sector and technological exclusion (of particular concern for health services).
- X Technology overly pervasive, at expense of face-to-face interaction and socialising – risk of isolation and mental health problems.
- X Dependence on technology risk of system failure, and of loosing skills & creativity
- Opposition to food innovation proposed food prioritised as a means of encouraging social interaction.



Ipsos MORI Social Research Institute

Citizen preferences for city energy system

Future scenario

Renewable communities



- Locally managed grids using locally generated renewable energy.
- Basic national grid maintained with competitive energy market.
- Flexible demand management through smart appliances.

Intercity trading



- City-based energy generation, including renewables or nuclear depending on regional resources.
- Surplus trading between cities through national grid, & emergency funding for energy 'poor'

Big power



- Centralised system using large scale nuclear, gas & offshore wind
- High prices maintain secure supplies
- Some cities opt to go 'off grid' with local or private solutions

Citizen preferences

Renewable Communities favoured as:

- greater choice & responsibility at community level
- vested interest in own energy provision may encourage more efficient use
- increased use of renewables more environmentally friendly

Big Power was least favoured as:

 power and profit seen to be concentrated with large energy companies

Concerns about equality were central to debates about **Intercity Trading** and **Big Power**

 Key principle that energy system should provide affordable energy for all, and regions with fewer energy resources should not be penalised

Citizen preferences for city health system

Future scenario

Targeted healthcare



- Large NHS paid for through high taxes.
- Monitoring and assessment by NHS drives highly targeted care delivery.
- Central decision-making over allocation of treatment.

Remote healthcare



- Automated & virtual healthcare with reduced NHS role, fewer large hospitals & private outsourcing
- Wearable tech diagnoses needs with services delivered by drone or robot

Open data platforms



- Users' health data from wearable tech openly & freely shared in exchange for tailored health services
- Private providers dominate with affordable services from competition

Private dominate



- Two-tiered system of public & private provision
- Taxes fund basic NHS services for everyone

Citizen preferences

Targeted healthcare favoured as seen as most equal system as free at point of use

Key principles central to debates around health:

- Equality: NHS should be protected as a prominent provider for all in future health system
- Efficient diagnosis & service delivery through effective use of technology including wearable tech and drones
- Preserving privacy & direct interaction however, to protect more vulnerable

Social Research Institute

Citizen preferences for city transport system

Future scenario

Regional renaissance



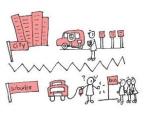
- Large NHS paid for through high taxes.
- Monitoring and assessment by NHS drives highly targeted care delivery.
- Central decision-making over allocation of treatment.

Me mobility



- Automated & virtual healthcare with reduced NHS role, fewer large hospitals & private outsourcing
- Wearable tech diagnoses needs with services delivered by drone or robot

Two tier town



- Users' health data from wearable tech openly & freely shared in exchange for tailored health services
- Private providers dominate with affordable services from competition

Car pool



- Two-tiered system of public & private provision
- Taxes fund basic NHS services for everyone

Citizen preferences

Regional Renaissance favoured as seen as providing highest quality public transport system

Quick and affordable transport was key priority, and so key principles central to debates around transport:

- Equality: good public transport should be available and affordable to all, not just those in city centres or on high incomes
- Reducing congestion but in balance with enabling flexibility: investment in public transport welcomed although personal freedom and flexibility prevented dismissal of scenarios with increased private car use



Citizen preferences for city food system

Future scenario

High Tech Globalised Supply

- Food is high tech, sold and distributed globally
- Market dominated by intensive production by multinational businesses
 - Large global market for 'heritage foods' e.g. Scotch whisky, Swiss cheese

Pulling Together Locally

- Communities locally grow own sustainable crops
- Technology (e.g. sensors & drones) ensure efficient water & fertiliser use
- Food rationed in case of poor harvests, with volatile prices

Government Keeps Me Healthy

- Government mass produces food centrally, ensuring basic nutrition
- Resource scarcity as a result of climate change means waste is penalised, with park land used to grow food

High Tech and Functional

- Technology widespread e.g. delivery drones, 3D printing of food highly convenient, but expensive
- No supermarkets, few kitchens in homes
- Roof-based urban farming common e.g. salad vegetables, honey

Citizen preferences

High Tech Globalised Supply favoured as allows consumers to enjoy food from around the world.

Pulling Together Locally has appeal as brings us closer to the origins of our food and improves community cohesion.

High Tech and Functional least favoured as:

- Too reliant on technology (although benefits of this were recognised, e.g. convenience).
- Social and cultural aspects of cooking and eating lost - rejection of 'food as fuel'



Ipsos MORI Social Research Institute

Citizen preferences for city waste system

Future scenario

Patching Things Up

- New products made from recycled resources and made to be recyclable
- Old products reused
- Environmental costs internalised so produce costs reflect lifetime impact

Repurposing



- Expensive high-end products made for life are the norm, with short-term fast-turn around consumption discouraged
- Broken parts are replaced, rather than whole products

Sorting Things Out



- High tech, government-run waste collection and recycling e.g. by autonomous vehicles
- Charges and fines encourage recycling and relate to amount and type of waste
- Less landfill, with waste reused for energy generation

Ipsos MORI Social Research Institute

Citizen preferences

Participants aspired to a less wasteful future society, with these values supported in all scenarios presented.

Patching things up most favoured as:

- Today, goods that are still usable are thrown away
- Pricing of goods reflects environmental costs

Products that last for life as in **Repurposing** appealing but:

- Might hinder innovation and reduce consumer choice
- Poorer citizens may not afford higher upfront costs

Sorting things out least favoured as participants:

- Want to reduce their waste, but not for this to be forced upon them by government
- Resent the idea of paying for waste by quantity

Citizen preferences for city water system

Future scenario

Citizen preferences

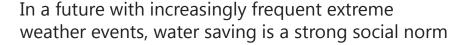
Smart Water



- High taxes fund government investment into water system
- Hi-tech e.g. smart pipes monitor water use, filter resources out of sewage
- Grey water reused

Make do and mend





 Mentality of using less, recycling more e.g. homes all have tanks for rainwater The preferred water outcome was **Smart Water** as:

- It embraced technology to facilitate reduced water use with minimal public effort - welcomed as current engagement in the water system is low.
- Although come concerns technology could fail.

Community patrol



- Water use managed and self-policed by communities – people have a strict water allowance, pay if exceeded
- Products include water footprint in cost

Community patrol, was least favoured as strict community control seen as 'Orwellian' and intrusive.

Technology revolution in our future cities

Citizen preferences around application of new technologies

More positive reactions

Less positive reactions











BATTERY











Based on qualitative exercise indicating top-of-mind consumer reactions & preferences

Imagining 2040

Implications of citizen views for planning urban futures

What do we want our cities to be like in 2040? Places where technology makes life easier, but where these benefits are shared equally, naturalness is not too lost and where social interaction is maintained.

What opportunities do new technologies offer? How do these play off against the challenges? Improved resource use efficiency, more tailored services, faster diagnoses of personal or system issues, but risking inequality of access and data misuse or loss.

Who are the winners & losers in different future scenarios? Locally-focused governance is desired to help cities and regions maximize their local resources and make locally relevant decisions, but needs of resource-poor communities must be considered.

What opportunities does this create for UK businesses to innovate? Citizens welcome innovation enabling smart resource use (water, waste), personal information (health, food) and tailored services (transport, energy) balanced against individual flexibility and choice.



Find the full Future Cities Dialogue reports here:

https://www.ipsosmori.com/researchpublications/publications/1924/ Future-Cities-Dialogue.aspx

For more information

Tim Silman

- **8** +44 (0)20 7347 3833
- ★ tim.silman@ipsos.com

Antonia Dickman

- **8** +44 (0)20 7347 3157
- +44 (0)7554400114
- antonia.dickman@ipsos.com





