

Ipsos MORI

Britain 2012

Who do we think we are?



Introduction

This summer the eyes of the world will be on London 2012 and, Britain 2012. The recent Diamond Jubilee captured worldwide attention and while we have staged the Olympics before, London 2012 is a truly global event taking place in an era of instantaneous media. It involves 205 countries sending over 14,000 athletes to Britain. The country will be on show, with a unique opportunity to impress the world and to start realising the much talked about ‘legacy’ of Olympic host status.

Our two most recent Olympic years – 1948 and 2012 – serve as bookends, providing us with an opportunity to reflect on Britain, the British, and our direction of travel. This paper looks briefly at the way our country has changed since 1948, the way Britons think, the values they have and the hopes and fears they share. It considers what we Brits perceive to be our country’s weaknesses and what we consider to be strengths. It draws on Ipsos MORI’s survey research (plus other available data) and, in particular, three recent polls of public opinion undertaken by us for the Design Council, British Future and Channel 4.¹

In writing this paper we have not sought to reproduce the kind of detailed analysis contained within past Ipsos MORI publications.² Nor is it our intention to explain British identity and Britishness (not least because that is a very difficult task³). Rather, we endeavour to summarise the key headlines from what we have found about the nature of Britain, British



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Cover artwork: With special thanks to David Bellamy for lending us his flag, first flown at the Coronation in 1952.

opinion and the spirit of our time - while the opening ceremony on 27 July seeks to showcase Britain, what do we really think of our country? How ambassadorial are we feeling, and are the British well placed to project a confident, compelling image of Britain?

After briefly showing how Britain 2012 is different to Britain 1948, we draw on survey data and other sources to show that, on first sight, today's Britons are gloomy in their outlook, before going on to show that there are some subtleties to this, and that the British are able to identify areas where the country excels. We look at the positive picture from outside, before questioning the nation's self-confidence especially in respect of British business. We conclude by drawing this together in a summary of British outlook and what this might mean for Britain moving forward.

All change: Britain 1948 to Britain 2012

The world has, of course, changed substantially since the Olympic Games were last held in London in 1948. And Britain and its people have changed too. For a start there are more of us: 62 million now⁴, up from 50 million in 1948⁵. We live longer: life expectancy at birth is 78.1 years for men, 82.1 for women, compared to 65.9 and 70.3 in 1948.⁶ Consequently, ours is an older population: at the time of the 1951 census, 15.7% of the population were aged 60-or-over⁷; now it is 22.6%, almost half-as-many-again.⁸

Britain 2012 is much more ethnically and culturally diverse. As a measure of that, in 1951 only 3.2% of the population had been born outside the UK⁹; according to the latest (2010-11) figures the proportion is now 13.9%.¹⁰ And our norms of family life are completely changed too: in those days, only 5% of births were outside marriage and 63% to mothers not out of their twenties; today, 47% of babies are registered to unmarried couples, and 48% of births are to mothers aged 30 or over.¹¹

In those days many people were worried about a post-war crime wave. (The Blue Lamp, in which Jack Warner as PC Dixon of Dock Green is murdered by young thug Dirk Bogarde, was filmed in 1949.) The total number of recorded crimes, of all types, in England and Wales in 1948 was 523,000, almost double the 1937 level. But that seems idyllic today. In 2010-11, by a neat if uncomfortable coincidence, 523,000 is the number of recorded burglaries; total crime was up to 4.15 million. However, perhaps contrary to popular wisdom, the most serious crimes have not

There are more of us:
62 million now, up from
49.8 million in 1948.



Britain then: **1948**

Female MPs:
24

NHS Spending:
3.5% of GDP

(£9 per head)

Total league football
attendances:
40,233,216 (1947-48)

June rainfall UK:
107.4mm

increased at the same rate: there were 341 homicides in England and Wales in 1948, 642 in 2010-11.¹²

While everybody may be feeling the pinch in 2012 as they were in 1948, a glance at some of the different items in the “consumer basket of goods” used to calculate the inflation rate is a reminder of how standards of living have changed. These are the things that the statisticians consider a typical household might need to spend their money on, so as to calculate the cost of living. In 2012, for example, the price of a washing machine and dishwasher goes into the calculation; in the 1940s, it was soap flakes and a mangle.

The pound has only 3.3% of its 1948 purchasing power: in other words, a 1948 pound would be worth £29.83 today (2011 figures), and what could be bought for a pound today would only have set back the 1948 consumer eight pence.¹³ Just as well, given that in 1948 the average adult male in a manual occupation brought in just £6/18 (six pounds eighteen shillings) for a forty-seven-and-a-half hour week¹⁴ – and his wife, if he had one, probably didn’t work at all. What’s more, the standard rate of income tax on that was nine shillings in the pound¹⁵ – 45%.

At least when he retired that man would have had more to look forward to than previously; 1948 saw reform of the state old age pension, introducing the “basic state pension”. A single pensioner today can expect £102.15 a week¹⁶, two-and-a-half times as high in real terms as the maximum rate before reform, just 26 shillings (£1.30) for a single man.¹⁷ If our 1948 pensioner spent part of that pension on a copy of the Daily Mirror (“Forward With The People”), it would have cost him 1d (one old penny, at 240 to the pound). He might well have done so, the Mirror was selling 4.6 million copies every day in 1950, with the Daily Express not far behind on 4.1 million. Today’s Mirror at 45p has a circulation of 1.1 million.¹⁸

Of course, there were no hordes of foreign tourists jetting in (or even propelling in) for the 1948 Olympics. And by the same token, few Britons were going abroad.¹⁹ Summer holidays for most were probably a few days at Butlin’s (where they would have found the 1948 British Olympic team training²⁰), or a week in a boarding house on the front at Skegness. Except for those on organised coach tours, most would have got there by the newly-nationalised British Railways (not yet “British Rail”). A car was still an unaffordable luxury for most²¹, and even if it hadn’t been, petrol was still being rationed along with meat, potatoes, eggs, bread, tea, sugar, sweets and clothing.

Meanwhile, all these trends were being watched and measured by Britain’s research industry, back at last to business as usual after years helping the war effort. President of the still-fledgling Market Research Society in 1948 was Dr. Mark Abrams, who two years earlier had founded his own company to enable him to specialise in his particular interest, social research. That company, Research Services Limited (RSL), was the earliest ancestor of Ipsos MORI.

As this paper demonstrates, our survey findings are still showing how Britons live, work and think today. In the section which follows we use contemporary survey data to paint a picture of British perspectives, drawing on trend data where available.



Britain now: **2012**

Female MPs:
143

NHS Spending:
9% of GDP

(£2,124 per head)

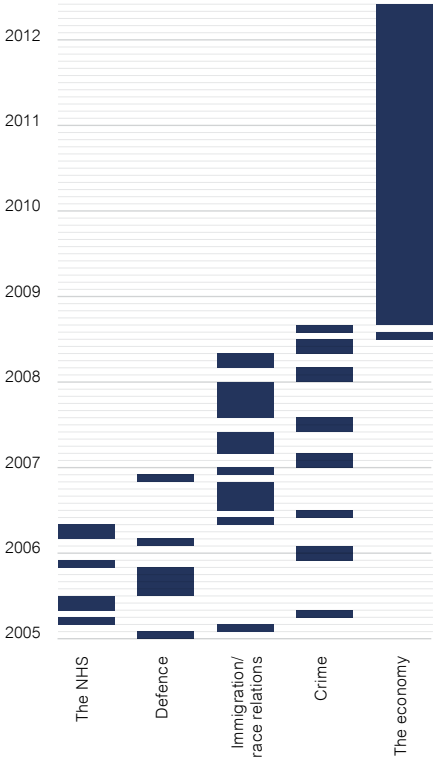
Total league football
attendances:
29,437,335 (2011-12)

June rainfall UK:
145.3mm

Britain 2012: it doesn't feel that great

Top issues of public concern since 2005 - 2012

What would you say is the most/other important issue facing Britain today?



■ = top issue for British public
Source: Ipsos MORI monthly Issues Index (2005-2012)

Britain has undoubtedly changed, and progressed, in numerous important ways since 1948, most obviously in terms of life expectancy and standards of living. But despite this, times are hard and Britain 2012 is anxious, pessimistic and less happy as a nation than in the 1950s, despite being three times richer²². There is, of course, some symmetry in this; the 1948 Games were called the ‘austerity games’, taking place in straightened times, and the modern era has also been dubbed ‘austerity Britain’ with a nod back in time towards ‘make do and mend’ and ‘keep calm and carry on’.²³

In both the 1940s and the 2010s, austerity was the product of economic downturns and seismic challenges to public finances. Reflecting the current backdrop, we have seen a shift in the public’s national concerns. During the 2000s and with a benign economic backdrop, public services and then security issues of all types, especially immigration, were the most salient issues in the public’s consciousness as measured by our monthly Issues Index²⁴. Now, the economy and unemployment worry Britain 2012 the most.

Despite the current low base, our monthly measures consistently show that more think the general economic condition of the country will get worse rather than improve over the next 12 months (our June Economic Optimism Index, EOI, was -32). This is not a uniquely ‘double dip’ phenomenon. The public’s economic mood changes according to

events and negativity was, for example, evident in 1998, 2001 and 2008 (EOI was as low as -64 in July 2008), but we are now seeing sustained pessimism during the longest economic downturn in the post-war era.

While this is not a uniquely British outlook, and nor should it be with a global recession, there is evidence that the British are good at pessimism. Leaving aside public sentiment in ‘BRIC’ nations, we were more pessimistic about the economy in summer 2011 than publics in Mexico, Turkey, Canada, Germany, the United States and Australia (to name a few) as well as Spain, Italy and Ireland.

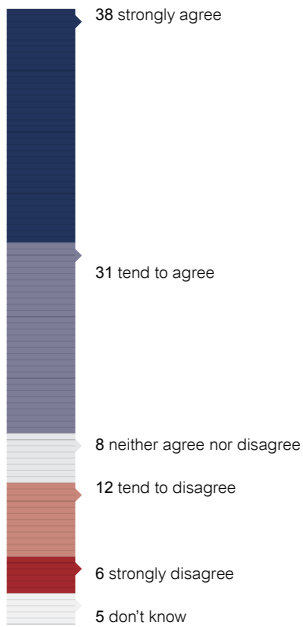
We are now seeing **sustained pessimism** during the longest economic downturn in the post-war era.





More agree than disagree with David Cameron that there are 'sick' pockets of society

To what extent do you agree or disagree with the following statement: "There are pockets of British society that are not only broken, but frankly sick?" (%)



Base: 515 British adults, 20-22 August 2011
Source: Reuters/ Ipsos MORI Political Monitor

Who do we think we are?

It's not just 'the economy stupid'

Even when the economy was growing and there was growth and investment in public services, the British were not especially happy about the nation's social direction of travel. An Ipsos MORI poll in May 2007 found six in ten, 60%, were of the view that Britain was getting worse as a place to live, more than four times the proportion thinking it was getting better (14%). This represented a fifteen percentage point negative swing since we first asked the question in 1998, a little over a year into Labour's term of office. Most recently, in June 2010 (during the downturn), we found little movement in optimism – down 2 points to 12 – but there had, at least, been a drop of 11 points in pessimism.²⁵

Four years ago the British public agreed that “British society is broken”; 63% took this view (including 35% who strongly agreed) against 27%. Things had improved a little by August 2011, despite that summer's riots, but this was still the prevailing sentiment. Then, more than two-thirds, 69%, agreed with David Cameron that “There are pockets of British society that are not only broken, but frankly sick”. Little wonder then that this sense of social decay allied to economic worries meant that at the end of last year British adults were pessimistic rather than optimistic about Britain's prospects in 2012 by a margin of more than 4:1.

There are some signs that these worries and sentiments are playing out in a hardening of attitudes towards welfare. In the late 2000s more Britons disagreed than agreed that “the government should spend more

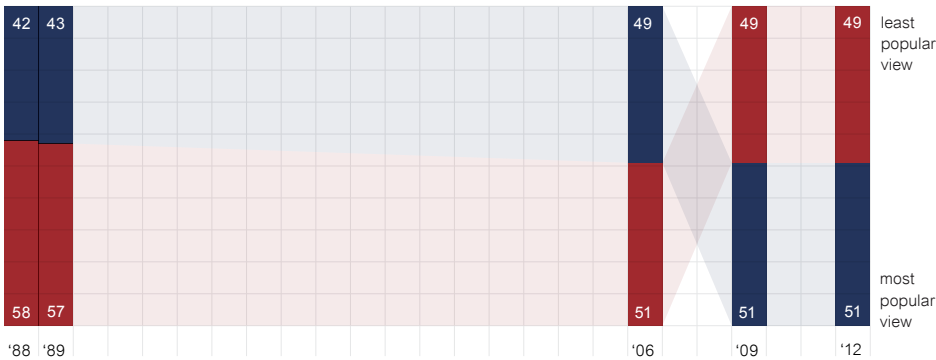
Ipsos MORI - Britain 2012

on welfare benefits for the poor, even if it leads to higher taxes”, reversing the balance of opinion existing in the late 1980s through the 1990s and most of the 2000s. Younger age groups are less supportive of welfare than Baby Boomers and Generation X, and among all cohorts our polls have found a sense that welfare isn't working, manifest in support for stricter eligibility tests.

We have found, for example, a downturn in the proportion favouring 'a society which emphasises the social and collective provision of welfare' in preference to 'a society where individuals are encouraged to look after themselves': 58% versus 42% in 1988 to 49% versus 51% last month (confining responses to those expressing an opinion). Our latest poll also shows that while support for cuts to spending on public services to pay off the deficit has fallen since the last general election, the public remain divided on this issue.²⁶ And while last year we found 60% opposed housing benefit cuts if they were to result in homelessness, perhaps more striking was that 18% said they would still support them even with this outcome.

Perceptions of the ideal society are changing – but slowly

People have different views about the ideal society. Please tell me which one of these comes closest to your ideal. (%)



Base: c1,000 British adults - repercentaged to exclude don't knows
Source: Ipsos MORI



A society where individuals are encouraged to look after themselves

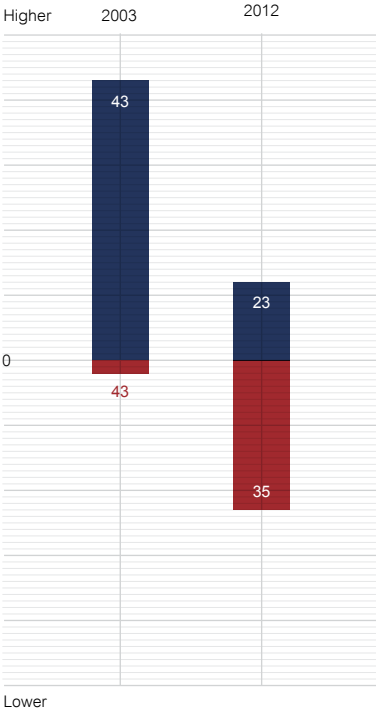
A society which emphasises the social and collective provision of welfare



More worries

We expect our children to have a lower quality of life than us

When they reach your age, do you think your children will have a higher or lower quality of life than you, or about the same? (%)



Base: 1,006 British adults, 19 - 21 November 2011
Source: Ipsos MORI

While Britons have become more attitudinally tolerant towards each other and towards different lifestyles, this increasing acceptance tends to dissipate when it comes to immigration. The British have worried about immigrants for some time; during the Blair years there was a twelve-fold increase in concerns about immigration and race relations. The pace of change has been unsettling in some communities, such as Barking and Dagenham which became more diverse more quickly than anywhere else in the UK, leading to protest and a minority to vote for the far right. Still, the mainstream, 70%, of Britons agree that there are “too many immigrants” in Britain.

While the British public’s concerns about the country have increasingly focussed on race relations and immigration, in our personal lives we are now more likely to worry about money and family than we were in the 1990s. It is not only material concerns which have increased since then, however, with more also worrying about health and ageing in particular, perhaps reflecting increasing media attention on these issues (but the British are also more likely than they were in the mid-1990s to agree with the statement that “the important thing is to enjoy life today, tomorrow will take care of itself”).

And while Britons are more likely than they were in the mid-1990s to think that young people have too much freedom without enough discipline, there is also growing concern about their prospects and, perhaps,

emerging worries about a ‘lost generation’. Now, 35% of adults think their children will have a lower quality of life than they did, up from 12% in 2003.

So far, so gloomy: most Britons are anxious about the economy and negative about our society. And when asked to look back, by two to one the British are of the view that people are not as proud to be British now as they were in 1948. On one level this is unsurprising given that year’s proximity to the Second World War and its associated efforts and hardships, but the British Future poll also suggests a sense that Britain has “lost something” (a strong nostalgia factor was evident in our Real Trends research in 2008-9²⁷). For example, Britain is considered to be a less polite place, less effective at parenting, and there are strong doubts that Britain is a more classless society now than it was then. (It is also striking that these sentiments are also held by the youngest age group who are further away in years from 1948 than older generations).

On balance we feel we’ve lost something...

To what extent do you agree or disagree with this statement, about how Britain has changed since 1948?

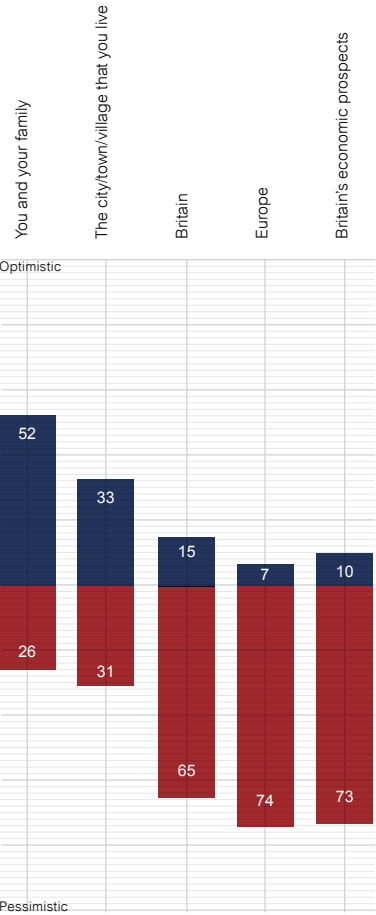
People are just as proud to be British now as they were then (%)



Base: 2,320 British adults, 30 Nov - 6 Dec 2011
Source: Ipsos MORI / British Futures

Away from home,
gloom reigns

Looking ahead to 2012, how optimistic or pessimistic are you feeling about... (%)



Base: 2,320 British adults, 30 Nov - 6 Dec 2011
Source: Ipsos MORI/British Future

But it is not *all* negative
and the direction of travel is
not *all* the wrong way...

The British are, on balance, positive closer to home, hence the “paradox” once identified by Tony Blair: “People who feel personally optimistic in Britain; but collectively pessimistic...Their future is bright; but the nation’s is dark.” Similarly, our poll for British Future at the end of last year found 15% optimistic, 65% pessimistic about Britain during 2012 but equivalents of 52% and 26% in respect of ‘you and your family’. The margin is smaller in respect of the local city/town/village but still, on balance, just about positive (33% to 31%).

The perception gap between national and local sentiments is easier to measure than to explain (‘hometown favouritism’ was one explanation offered by US academics in the late 1990s²⁸). It is prevalent among men and women, all age groups and regions, although optimism about both family and locality is relatively high among young Britons and those in higher grade professional occupations.

Our polls show that the perceived direction of travel is not all in the wrong direction and the British are able to identify areas of national strength. For example, there is recognition among all generations that women have more choices in modern Britain than they did in 1948 and that people in Britain are less discriminatory of people who are gay. Ipsos MORI research confirms this and there has been a quite remarkable shift in British public opinion on gay marriage over the past decade, especially given that as recently as the 1990s a majority thought that sexual relations

between two adults of the same sex was “always wrong”.

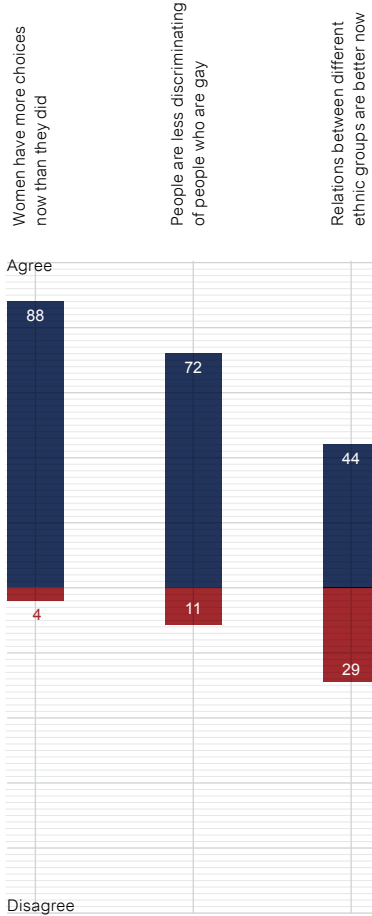
To a lesser extent, Britons feel that relations between different ethnic groups are better now than they were then – 44% agree with this, 29% disagree – but this is felt relatively *less* among older age groups and *more* among those from ethnic minorities. Attitudes appear to be correlated to the extent to which people mix socially; 42% of 15-34 year olds say they mix with people from a different ethnic background on a daily basis (39% with people with a different sexuality and 52% from a different generation). At the same time, there are some misconceptions - half the British public think that 15% or more of the resident UK population was born overseas, with a quarter sure that this applies to more than 30% of the population (the real figure is 13.9% according to the latest estimates).

By more than 6 to 1 the British believe their country is a less religious place now than it was in 1948, according to our poll for British Future. What we don’t know is whether this is considered a positive development or not, but we *do* know that the British are supportive of the concept of religious and ethnic tolerance and see further scope for enhancing respect of other groups. Seven in ten think that there should be more respect in Britain for the beliefs of Christian people and the same proportion believe the same about non-Christian faiths.

Taken together, this evidence shows that Britons recognise that the modern society that they belong to is more tolerant. Our surveys for the Design Council and Channel 4 respectively found cultural diversity to be the second highest rated British strength compared to the rest of the world (from a list of 12) and tolerance to all sections of society as the third ranked ‘best’ British characteristic (from a list of 8). While those same polls found a majority taking the view that “people who come to live in Britain should adopt the values and traditions of British culture”, by two-to-one Britons also think that the children of those who have come to Britain

Better for women,
more tolerant, diverse...

To what extent do you agree or disagree with the following statements about how Britain has changed since 1948? (%)



Base: 2,320 British adults, 30 Nov - 6 Dec 2011
Source: Ipsos MORI / British Future

from abroad should be able to choose to support the sporting teams of the countries their parents came from “without people saying this shows they don't fit in here” (the so-called ‘cricket test’).



There are many subtleties to British public opinion

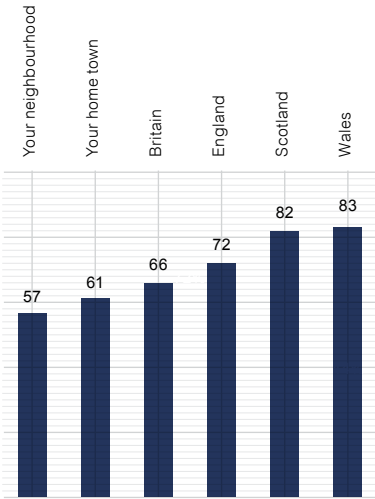
There is gloom but some aspects of the direction of travel are positive. There are also many subtleties to public opinion. For example, while our polls in the 2000s found that, by two to one, people think that multiculturalism makes Britain a better place to live, our survey for Channel 4 this year found 43% agreeing ‘I would rather live in an area where most people are from the same ethnic background as me’. In addition, we shouldn't conflate tolerance and multiculturalism with support for immigration: as already mentioned, seven in ten think there are “too many immigrants in Britain” and, by two to one, that immigration will hinder rather than help Britain's economic recovery.

Given these anxieties and the growing diversification of Britain's population, do Britons still feel British? The notion of Britishness has become a major topic of debate, although our research suggests that nationality is only a small part of what Britons identify with.²⁹ Instead, they tend to reference their family, marital status and community as the most important aspects describing who they are. Still, while the British are more optimistic about the prospects of their locality than those of the country, they are a little more likely to feel a sense of belonging to Britain than their home town; two-thirds, 66%, feel they belong either very or fairly strongly to Britain, 61% to their home town.

There are more striking differences in relation to England, Wales and Scotland. Those living in each nation within Britain feel a stronger sense

British...but also English, Scottish, Welsh

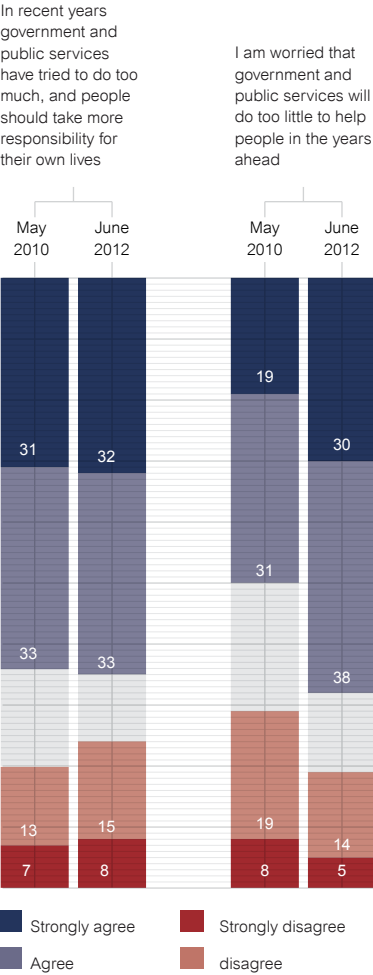
How strongly do you feel you belong to... (%)



Base: 2,320 British adults, 30 Nov - 6 Dec 2011
Source: Ipsos MORI / British Future

Many think government has done too much, but worry about the vulnerable is increasing

To what extent do you agree or disagree with each of the following statements: (%)



Base: 515/490 British adults, 9 - 11 June 2012
Source: Ipsos MORI

of belonging to that nation than they do to Britain. This is most marked in Wales and Scotland. In Wales, 36% feel they belong very strongly to Wales while 22% say the same of Britain. In Scotland, the equivalent figures are 52% and 20%. Clearly, while 2012 is a big year for Britain, a bigger one will be 2014 with the referendum on Scotland’s future in the Union.

There are also subtleties to conceptions of the state and its role. For example, more think that the government “should not get involved with interfering in people’s lifestyles” than “it is the government’s responsibility to influence people’s behaviour to encourage healthy lifestyles” but not by much (37% against 32%). And while the British think Government has recently tried to do too much and that people should take more responsibility for their own lives, they also worry that it will do too little to help people in the years ahead.³⁰ There is also a strong belief in fairness and an antipathy towards ‘postcode lotteries’ in service standards but, at the same time, we have found public support for quite radical approaches to greater local control.³¹

Taken together, this and other evidence³² demonstrates the complexity and often contradictory impulses of British public opinion. It is not just that there is a broad spectrum of views across different people, it is that the same person can hold apparently very inconsistent views. Attitudes and values have many facets, and they can shift in complex ways.

Britain’s balance sheet

Although our poll for British Future found 52% of the British public think that people are not as proud to be British now as they were in 1948, in fact surveys show that pride in being British is very high – for example, in 2006, 59% said they were very proud to be British (compared to equivalents of 46% in France and 23% in Germany).³³ Still, as a nation we certainly know our shortcomings. Half of us pick ‘drink too much’ from a list of eleven possible ‘worst characteristics’ – identified uniformly by men and women, all age groups and social classes – and this is certainly backed-up by hard statistics with, for example, drunkenness more prevalent among young age groups in Britain than in most European countries.³⁴ A third of us choose ignorance of other cultures ahead of ‘complain too much’ (23%).

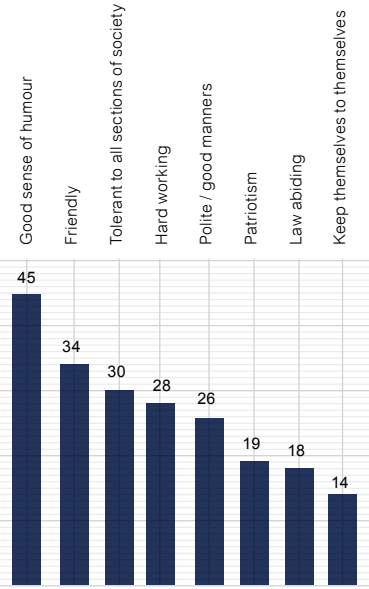
When asked to choose the two or three best characteristics of the British people from a list of eight, 45% of Britons select a good sense of humour. Whether true or not, we continue to think we have a laugh more than they do in other countries. Another constant is the British love of drinking tea: despite the rise of coffee in the past decade, it is still the case that we like to have a cuppa. Now, 38% identify it as their favourite drink (above beer and wine) and 65% consider it to be the national drink. Fish & chips beat roast beef & Yorkshire pudding as Britons’ favourite dish, by a 41% to 31% margin, with curry trailing on 8%.

This could be considered fairly predictable, and hardly indicators of national confidence. However, humour is followed by being friendly (34%)



The British Character

From this list, please tell me which two or three, if any, you think are the best characteristics of British people as a whole?



Base: 998 British adults, 27 Jan- 5 Feb 2012
Source: Ipsos MORI / Channel 4

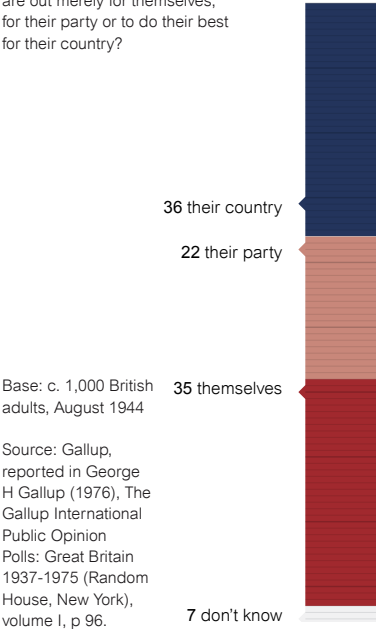
and tolerance to all sections of society (30%) suggesting a recognition of the trends in public attitudes described earlier i.e. Britons do recognise the changes in themselves. There are some differences by generation, with younger age groups more likely than others to pick out hard working from the list (32% versus 25% of 55+ year olds) and less likely to identify law abiding (12% versus 24%). Britons from ethnic minority backgrounds chose friendliness (42%) above humour (28%).

Britain's worst characteristic?



Some scepticism: not a new thing ▶

Q: Do you think British politicians are out merely for themselves, for their party or to do their best for their country?



Base: c. 1,000 British adults, August 1944

Source: Gallup, reported in George H Gallup (1976), The Gallup International Public Opinion Polls: Great Britain 1937-1975 (Random House, New York), volume I, p 96.

Pride in history and institutions, but where is business?

According to our survey for Channel 4 earlier this year, national pride surfaces most readily when considering our history – 45% say this makes them most proud to be British from a list of ten possibilities – followed by particular institutions, the NHS (37%), the Army/armed forces (36%) and the Royal Family (28%), and these findings chime with a strong British attachment to tradition.³⁵

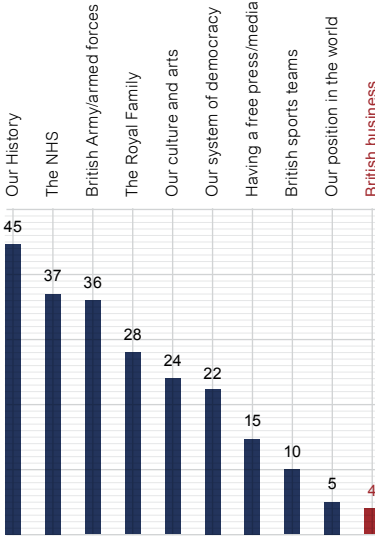
The NHS remains the flagship British public service in terms of public affection (former chancellor Nigel Lawson once remarked that the NHS was the only national religion), and public satisfaction levels are relatively stable despite it having to tackle some huge challenges. Meanwhile, public attitudes to the monarchic principle have remained virtually the same over the past three decades and Ipsos MORI recently found record satisfaction with the Queen.³⁶ By contrast, British business is chosen by only 4% as something which makes people proud to be British, making it the lowest-ranking of all ten possibilities.

Our system of democracy is mid-ranking with 22% choosing this (there is some variation by age with older age groups relatively more likely to pick out our democracy). Other polls show strong British distrust of politicians and, while scepticism is not an entirely modern phenomenon (as the graph to the left shows) the last three decades have seen a steady upward trend in the percentage saying ‘almost never’ in response to the question ‘How much do you trust a British government of any party to place the needs of this country above the interests of their own political party?’³⁷



What we really value about Britain...

Q: Overall, which two or three of the following, would you say makes you most proud to be British?

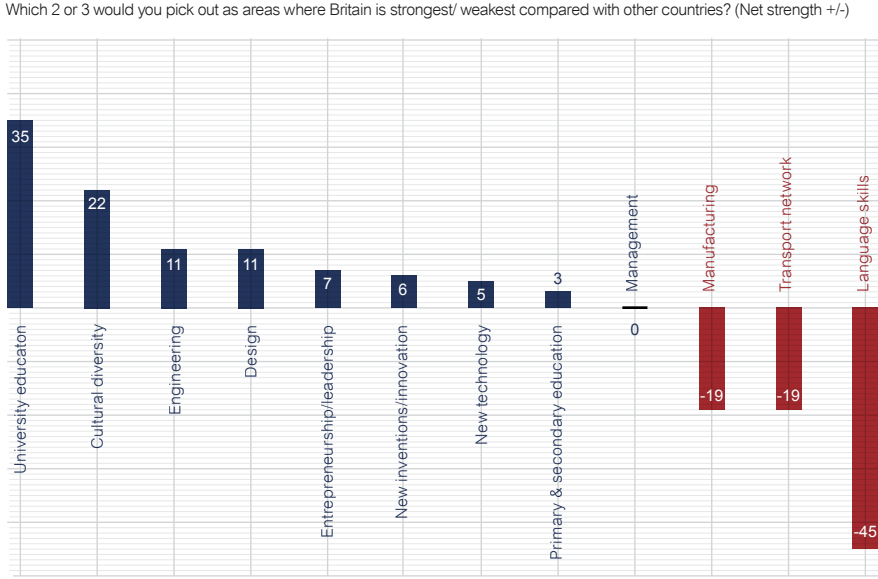


Base: 998 British adults, 27 Jan - 5 Feb 2012

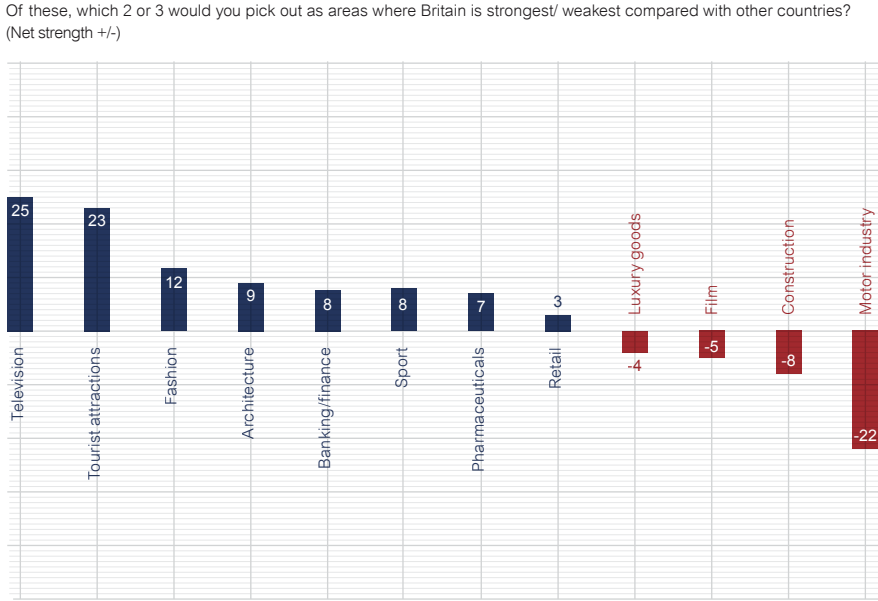
Source: Ipsos MORI / Channel 4

Our self assessment
The inputs...

Who do we think we are?



The outputs...



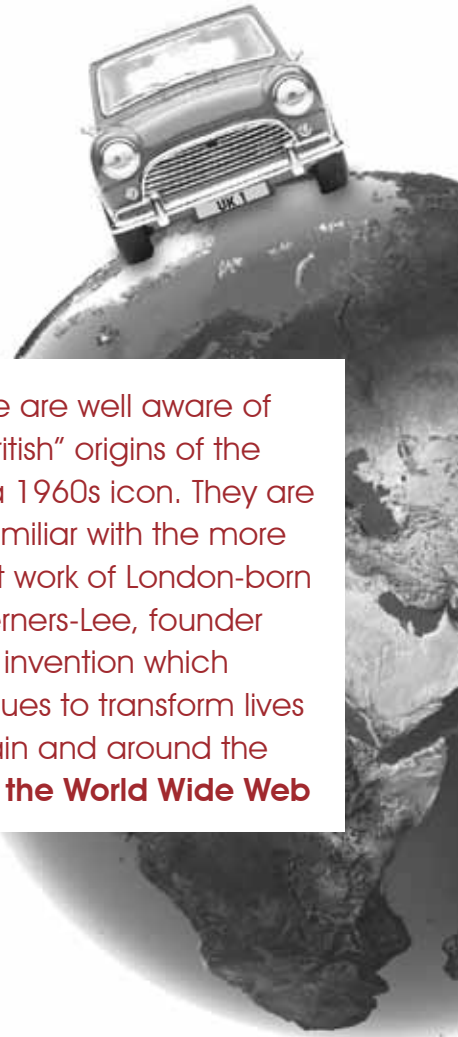
Base: 1,003 British adults, 25-31 May 2012
Source: Ipsos MORI / Design Council

Ipsos MORI - Britain 2012

Only 17% of British adults agree that “In general, the people in charge know best” and the idea of the ‘end of deference’ is well-worn. The period since 1948 has also seen a gradual trend toward disengagement from formal, electoral politics, reflected in lower turnouts, declining political party alignment (as measured by surveys) and membership. At the same time, conceptions of ‘rights’ have strengthened (and mechanisms for asserting these have expanded), hence Gerry Stoker’s observation that “people are more demanding and more apathetic”³⁸.

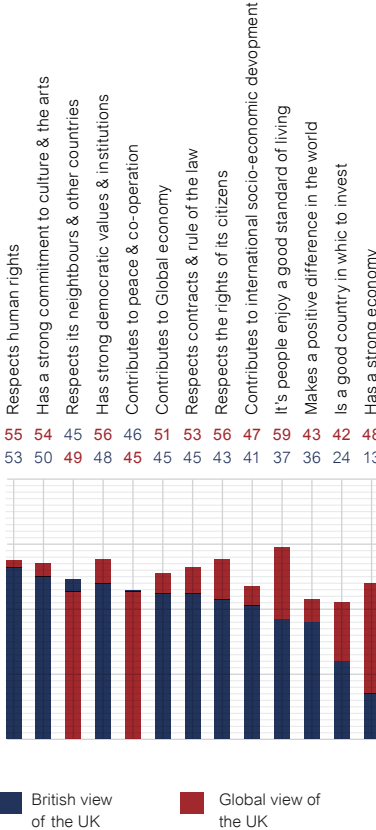
Finally, how does Britain compare? The British consider their country strongest when compared to other countries in respect of tourist attractions, television and banking/financial services which are the three top-ranked from a list of twelve. Also considered relatively strong are our university education system, picked out of a separate list by 40% and other sources show rising student satisfaction with university education in Britain. University education is followed by cultural diversity (29%), primary and secondary education (20%), and engineering (19%). Older age groups are most likely to recognise innovation and new inventions; 21% of those 55 or older against only 8% of 15-24s.

People are well aware of the “British” origins of the Mini, a 1960s icon. They are less familiar with the more recent work of London-born Tim Berners-Lee, founder of the invention which continues to transform lives in Britain and around the world: **the World Wide Web**



Typically self-deprecating
Brits

Taking into account all the things which you think are important, how favourable or unfavourable is your overall opinion/impression of the UK...? (%)



Base: c 500-1,000 residents aged 16 - 64 (18 - 64 in the US and Canada) in each country, July 2012

Source: Ipsos MORI Global @dvisor

A matter of confidence

If the British people give themselves a fairly robust self-assessment, how is the country seen from abroad? These assessments are of course based on a longer lens, filtered by a whole series of assumptions, perceptions and, in some cases, experiences. This lens, if not entirely rose-tinted, actually shows the country in quite a favourable light. A good all-rounder, with a lot going for it. It is its inhabitants and, as we show later, its business community – who are rather less convinced.

Is Britain a good place in which to invest? Only one in four Brits (24%) thinks it is. Among global consumers looking at Britain from a distance, the figure rises to 42%.

Do we have a strong economy? You must be joking! Just 13% of Brits give a favourable score. Globally, 48% award Britain this label.

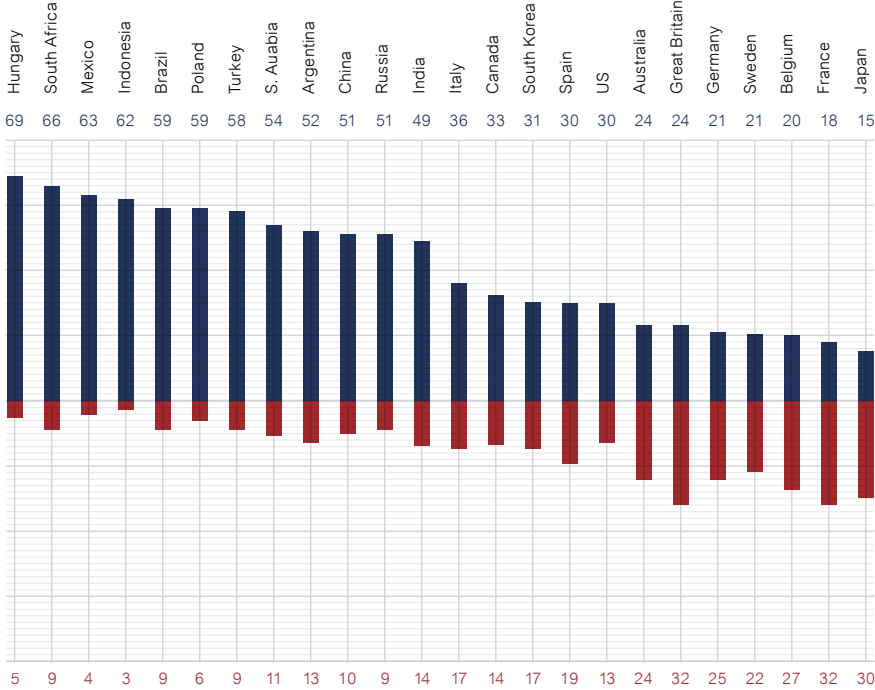
Indeed, across a whole range of topics, we find people around the world seeing Britain in a pretty positive light. It is seen as a country which respects the rights of citizens, is good at human rights, follows international law, is committed to culture/the arts, and has a good standard of living.

Whatever its current problems, it is clear that this reasonably positive picture is a reflection of Britain's relative strength in terms of both its economy and its institutions, certainly when seen from a developing market. But there is also some evidence that Britain stands out from other western nations in a way that could be good news for UK plc if harnessed in the right way. For example, British Council research finds “people from

the UK” are more trusted than those from Germany and particularly the US. It also highlights the power of the English language as a draw, and the impact taking part in cultural activities can have on how the country is viewed.

All of this adds up to a mildly uplifting picture. It raises questions as to whether the country is a rather more interesting and compelling proposition than it thinks it is. Before getting too excited, it is worth emphasising one point. First, the further you go from Europe, the better Britain looks. Or put another way, our European neighbours and trading partners tend to take a rather less positive view, as the chart below (and we have a whole set of these!) illustrates:

Taking into account all the things which you think are important, how favourable or unfavourable is your overall opinion or impression of the UK... is a good country in which to invest (%)

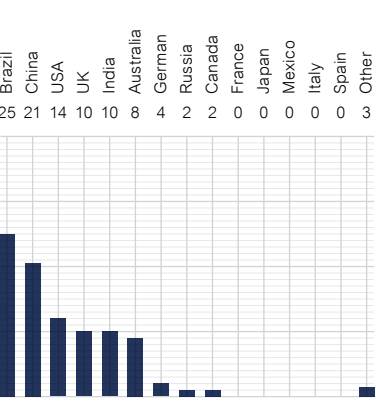


Base: c 500-1,000 residents aged 16-64 (18 - 64 in the US and Canada) in each country, July 2012

Source: Ipsos MORI Global @dvisor

Not so attractive when
compared to elsewhere

In the current climate, which of the following countries do you believe offers the best environment for business? (%)



Base: British Captains of Industry (100), Sep-Dec 2011

Source: Ipsos MORI

Base: c 500-1,000 residents aged 16-64 (18 - 64 in the US and Canada) in each country, July 2012

Source: Ipsos MORI Global @dvisor



“ Manufacturing contributes over £6.7trillion to the global economy and the UK is a major competitor. In terms of manufacturing Gross Value Added (GVA), it is in the world’s top 10, generating 10% of UK GVA. UK manufacturing directly employs 2.5 million people...The UK ranks second only to the US in the aerospace industry, and two out of the top six pharmaceutical companies are headquartered in the UK, where they also support significant manufacturing assets. The resurgent UK-based auto industry exported a record-breaking 84% of production in 2011. ”

Source: Technology Strategy Board

Perhaps we should not be too surprised that our European neighbours are more lukewarm about us. They are hardly hearing us shout loudly about how good our economy is at the moment, and indeed about what a good place Britain is to do business. As already mentioned, the finding that only 4% of the public cite being “good at business” is one of the starkest figures to come from our recent research. And the verdict from Britain’s business leaders doesn’t give a sense of a country that feels brilliant about itself as a place to do business. Yes, 51% agree that Britain is a “good place” to do business, but this is fairly lukewarm – only 6% strongly agree. When we give these Captains of Industry a list of countries, it is Brazil, China and the US which they think offer the best environment.

This really brings us on to a further point, which is all about confidence. Depending on which measure we use, Britain is the seventh, eighth or ninth biggest manufacturing country in the world, and there is lots of evidence to suggest that it is doing quite well.

This news does not appear to have reached the street yet, or indeed the boardroom. Ask Captains of Industry where they think Britain’s competitive advantage lies and it is to financial services that they look:

So, although it does not take long to find evidence that at least some parts of the British economy are doing quite well, and that the country is actually seen from abroad as having a whole host of benefits, only the most heroic would say that there is a shared narrative about what’s good about British business, and that the country is on the right track.

Britain 2012: now and next

The content of this paper will not be news to many, and we strongly expect that our brief portrait of Britain 2012 will ring true for readers. Britain 2012 is obviously remarkably different to Britain 1948 and in numerous ways our country has changed for the better.

In terms of worldviews, the period since 1948 has seen the demise of traditional, simple bi-polar left-right politics: the modern reality is that people hold a more multi-polar view of society. And there are subtleties and complexities to British public opinion.

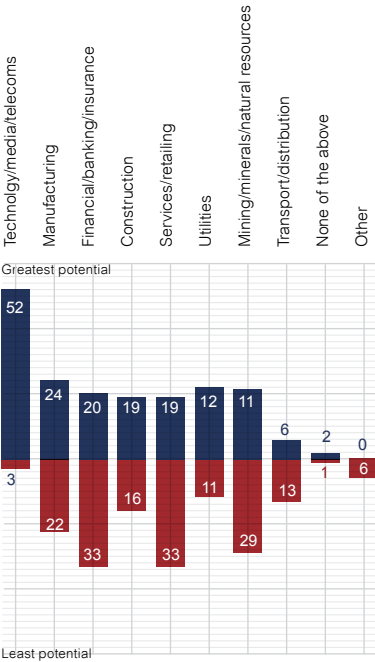
The mood today is a gloomy one and unsurprisingly so given the backdrop but, despite this, there remains a relatively optimistic view about personal situations and local futures set against more pessimistic perceptions of the national picture. The direction of travel is not all wrong and the British are able to identify areas of national strength and pride.

We have shown that despite huge change in our numbers, our socio-demographic make-up and economy, the British are, largely, at ease with each other. But they are certainly not at ease: there is a sense that things will get worse – economically, socially and in terms of public services – and an emerging worry that there will be, if not a Japanese-style “lost decade”, then perhaps a generation which experiences a lower quality of life.

Whichever way you look at it, Britain 2012 faces huge and complex challenges: economic, demographic, fiscal and political. As the country grapples with these challenges in the years ahead, and the economy

British Captains of industry and British potential

In which of the 1 or 2 following sectors do you see the greatest and least potential for growth in the UK over the next 12 months (%)



78% of Captains of industry single out financial services as an area where the UK has a competitive advantage. However, when asked about where future growth will come from, they look to other sectors

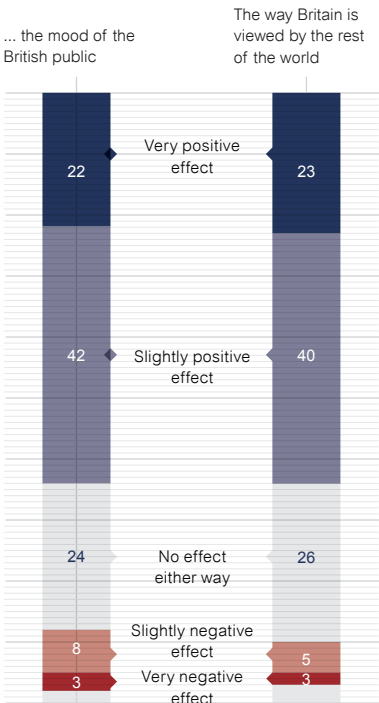
Base: British Captains of Industry (100), interviewed Sep-Dec 2011

Source: Ipsos MORI



An Olympics bounce?

What effect, if any, do you think the 2012 Olympics will have on... (%)



Base: 2,320 British adults, 30 Nov - 6 Dec 2011

Source: Ipsos MORI / British Future

and public sector cuts continue to bite, British values including fairness and tolerance will be tested. Britain and her people will need to display characteristic fortitude and, also, perhaps uncharacteristic confidence in a competitive, global environment.

There are reasons to be cheerful. Ours is a nation looking for a feel-good boost and the British think that the 2012 Olympics will provide it. The Ipsos MORI poll for British Future late last year found 64% taking the view that the Olympics will have a very or slightly positive effect on the mood of the British public, and the same proportion predicted it will have a positive effect on the way Britain is viewed by the rest of the world (notably, this second view was shared by 61% of those pessimistic about Britain's economic outlook).

If it materialises, such a bounce would come on top of an already largely positive view of Britain from outside. But would it last? And will we truly exploit the opportunity and build a legacy? As we have shown, one barrier could be confidence – there is low domestic recognition of our capabilities in business and design. Similarly, while there is evidence that British society has chalked up a number of successes in recent decades, this view does not seem to be particularly prevalent among both the public and the politicians who represent them.

What next? Britain will surely win gold medals at London 2012 but what lies beyond? Britain 2012 clearly needs economic recovery above everything. Confidence will be both cause and effect of recovery. It can be built, but this will take time.

Anyone for a cup of tea?



1.

Ipsos MORI for Channel 4, 998 British adults aged 15+, face-to-face, in-home, 27 January-5 February 2012; Ipsos MORI for the Design Council, 1,003 British adults aged 15+, face-to-face, in-home, 25-31 May 2012; Ipsos MORI for British Future, 2,320 online interviews with adults aged 16+ on Britain, 30 November-6 December 2011.

2.

Ben Marshall, Sarah Castell, Bobby Duffy, Suzanne Hall and Julian Thompson (Ipsos MORI), Blair's Britain: the socio-cultural legacy, 2007.

3.

See, for example, Mark Easton, 'Define Britishness? It's like painting wind' – <http://www.bbc.co.uk/news/uk-17218635>.

4.

ONS Mid-Year Population Estimates for 2010. Recently published ONS figures from the 2011 Census recorded a population in England and Wales of 56.1 million, up 3.7 million in a decade. Figures for Scotland, and thus Britain, are not yet available.

5.

David Butler and Gareth Butler, Twentieth Century British Political Facts 1900-2000 (Basingstoke: Macmillan, 2000), p 347.

6.

ONS UK Interim Life tables, 2008-10 (UK), and ONS table Life expectancy at birth, 1910 to 2001, (England and Wales).

7.

David Butler and Gareth Butler, Twentieth Century British Political Facts 1900-2000 (Basingstoke: Macmillan, 2000), p 349.

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ONS Mid-Year Population Estimates for 2010.

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ONS Annual Population Survey, Table 1.1: Estimated population resident in the United Kingdom, by country of birth, October 2010-September 2011.

11.

ONS, Live births in England and Wales by characteristics of mother 2010, Table 2. (Figures are for England and Wales, in 1948 and 2010. Marriages include civil partnerships in the 2010 statistics.)

12.

Home Office, Recorded Crime Statistics for England and Wales, 1898-2001/02. (<http://www.homeoffice.gov.uk/publications/science-research-statistics/research-statistics/crime-research/historical-crime-data/rec-crime-1898-2002>) and Recorded Crime Statistics for England and Wales, 2002/03-2010/11 (<http://www.homeoffice.gov.uk/publications/science-research-statistics/research-statistics/crime-research/historical-crime-data/rec-crime-2003-2011>). Homicides include murder, manslaughter and infanticide.

13.

ONS Consumer Price Indices, May 2012, Table 34 (Composite Price Index).

14.

David Butler and Gareth Butler, Twentieth Century British Political Facts 1900-2000 (Basingstoke: Macmillan, 2000), p 383.

15.

David Butler and Gareth Butler, Twentieth Century British Political Facts 1900-2000 (Basingstoke: Macmillan, 2000), p 361.

16.

<http://www.guardian.co.uk/money/2012/mar/21/budget-2012-flat-rate-pension-scheme>

17.

David Butler and Gareth Butler, Twentieth Century British Political Facts 1900-2000 (Basingstoke: Macmillan, 2000), p 383.

18.

<http://www.pressgazette.co.uk/story.asp?sectioncode=1&storycode=49500&c=1>

19.

In the twelve months to April 2012, Britons made 56 million visits to foreign countries (about 0.9 per person), of which around 36 million were classed as holidays.

20.

<http://www.dailymail.co.uk/news/article-2162931/Austerity-Olympics-Athletes-trained-Butlins-luxury-free-Horlicks-Britain-1948.html>

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In 1950, the number of current driving licences for cars had just topped 3 million. (David Butler and Gareth Butler, Twentieth Century British Political Facts 1900-2000 (Basingstoke: Macmillan, 2000), p 372).

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Mark Easton, 'Britain's Happiness in Decline', www.bbc.co.uk, May 2 2006.

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David Kynaston, Austerity Britain, 1945-1951 (Tales of a New Jerusalem).

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<http://www.ipsos-mori.com/Assets/Docs/Infographics/ipsos-mori-a-history-of-british-economic-worry-infographic.pdf>

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Ipsos MORI interviewed 961 British adults, 11-13 May 2007 and 1,006 British adults, 18-29 June 2010.

26.

Ipsos MORI, 1,016 British adults, 9-11 June 2012.

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Real Trends – Ipsos MORI, 2,019 British adults, 9 May-5 June 2008.

28.

See Smith, T.W. (1998) 'An Analysis of Public Evaluations of Neighborhoods, Communities, and the Country' National Opinion Research Center, University of Chicago.

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International Social Survey Programme, 2003.

30.

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31.

See What do people want, need and expect from public services?, Ipsos MORI/The 2020 Public Services Trust at the RSA <http://www.ipsos-mori.com/researchpublications/publications/publication.aspx?oItemId=1345>

32.

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33.

Source: Eurobarometer 2006.

34.

See for example, ippr Freedom's Orphans, 2007.

35.

87% of Britons agree "traditions are an important part of society". Source: Real Trends – Ipsos MORI, 2,019 British adults, 9 May-5 June 2008.

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Nine in ten (90%) British adults are satisfied with the way the Queen is doing her job: <http://www.ipsos-mori.com/researchpublications/researcharchive/2977/Satisfaction-with-the-Queen-at-record-high.aspx>

37.

Source: British Social Attitudes survey.

38.

Gerry Stoker, Prospect, January 2006.

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