



NOVEMBER 2017

**REFLECTING
A CHANGING
BRITAIN IN A
CHANGING
WORLD**



Ipsos MORI

Contents

Reflecting a changing Britain in a changing world	1
1. Britain in context	1
2. Britain – a divided nation?	3
3. What brings Britain together?	8
4. Why does British content matter?	12
5. Conclusion	17

This work was carried out in accordance with the requirements of the international quality standard for Market Research, ISO 20252:2012, and with the Ipsos MORI Terms and Conditions which can be found at <http://www.ipsos-mori.com/terms>.

© Ipsos MORI 2017.

Reflecting a changing Britain in a changing world

Britain in 2017 is portrayed as an increasingly divided place. Whether the cleavage is between the “haves” and the “have nots”, Millennials and Baby Boomers, Brexiteers and Remainers, “Somewheres” and “Anywheres”, or the experts and the rest, it can feel like we share very little in common as a country.¹ These narratives of division and difference dominate our national debate in a way they have not done for decades.

Combined with major political upheavals at home and abroad, it feels as though we are living through an age of instability, with people retreating to their camps and staying put. Social media is blamed for reinforcing existing views and exacerbating these differences.² Families and communities are divided.³

But what is the truth in this – are we really living in an increasingly divided nation? What are the shared values and priorities that we do agree on? Is there a role for British TV content, and for institutions like the BBC, in both reflecting these differences, and in bringing the nation together around what we all share?

1. Britain in context

First, it is worth putting the changes in the UK into a wider context. We are not alone in experiencing uncertainty about the future. We are living through a period of tectonic shifts as technological advances alter almost every aspect of life from the way we connect with each other, to how we work and how we consume media. The pace and reach of these changes are accelerating with over half the global population projected to have internet access by 2021.⁴

How many people there are and where they live is also changing. As populations in many established economies age and shrink with declining birth rates, emerging economies – particularly in Africa – are booming. Nigeria is likely to have a larger population than the United States by 2050, with 44% of its population under the age of 15 today.⁵ In contrast, 35% of Europeans will be over the age of 60, with just two working age people per older person at the mid-point of the decade (compared with 3.3 working age people per older person in 2017). This is creating generational strains in many parts of the world, with a growing gulf in the opportunities and experiences of the young versus the old.

The Ipsos Global Trends Survey explores the big questions facing the world, comparing attitudes in Britain to those in over 20 other countries. One of the starkest themes coming through the global results is the underlying sense of fragmentation across many spheres of life and an increasing disillusionment with how the world is today.⁶ This is epitomised by an apparent wave of populism and a feeling of “being left behind” experienced by huge numbers of people across every continent. This is a global crisis of elites. In every one of the countries involved in the survey, the majority view is that the economy is rigged to the advantage of the rich and powerful. This ranges from 56% of people in Sweden to an overwhelming 94% of people in Mexico.⁷ Governments don’t fare much better, as almost three quarters of the people surveyed don’t think their government prioritises the concerns of people like them. Again, in every country involved, half

¹ Examples of press coverage include: <http://www.dailymail.co.uk/news/article-3941444/Divided-Britain-Gulf-haves-nots-widening-middle-income-families-held-warns-shocking-report.html>; <http://www.newstatesman.com/politics/uk/2017/03/anywheres-vs-somewheres-split-made-brexiteers-inevitable>; <http://www.telegraph.co.uk/news/0/brexiteers-vs-remainers-political-ding-dong/>

² <https://www.theguardian.com/politics/2017/feb/04/twitter-accounts-really-are-echo-chambers-study-finds>

³ <https://www.nytimes.com/2016/06/22/world/europe/britain-eu-referendum-families.html>

⁴ https://www.cisco.com/c/m/en_us/solutions/service-provider/vni-complete-forecast/infographic.html

⁵ https://esa.un.org/unpd/wpp/Publications/Files/WPP2017_KeyFindings.pdf

⁶ <https://www.ipsosglobaltrends.com/foreword/>

⁷ Global Trends Survey, Ipsos MORI <https://www.ipsosglobaltrends.com/economy-rigged-for-the-rich/>

or more people agree their concerns, or the concerns of people like them, are not being prioritised by their government. This ranges from 87% agreeing in Mexico to 50% in Japan.

The EU Referendum result and the Presidential election of Donald Trump have led to an obsession with the rise of populism.⁸ But “populism” is not the same everywhere and manifestations of discontent are not necessarily “populist” as is traditionally understood. While this frame can be helpful for understanding some aspects of politics today, it cannot explain all current trends on its own.⁹ There is certainly global discontent towards elites, but this sentiment is playing out at a local level, in different contexts and with different results. This mood can be summed up as “the system is broken” – people feeling that society is broken, traditional political actors don’t care about people like them, that experts don’t understand their lives, and that their economy is rigged.¹⁰ While these global trends are ricocheting around the world with a seemingly universal appearance, it is necessary to dig down into local nuances to understand what is really going on now and what could happen next.

For example, there is a gap between countries where political dissatisfaction is associated with high levels of ‘nativist’ sentiment¹¹ – negativity about the economic and cultural impact of immigration, such as France and Hungary – and countries with much lower levels of nativist sentiment but still high levels of discontent – like Mexico or Brazil, where unpopular governments, high crime rates and poor economic performance are producing similar levels of discontentment. Before the recent election of Moon Jae in May 2017, South Korea was also in this low nativist group, ahead of the impeachment of the president owing to allegations of corruption.¹² However, since the election, South Korea has bucked the trend with 66% of people in August 2017 saying their nation is heading in the right direction, a 50 percentage point increase from May 2017.¹³ This compares to the economic pessimism of others in the “low nativist” group – only 8% of people in Mexico and 12% of people in Brazil feel their country is heading the right way.

⁸ Understanding Society – Beyond Populism, Ipsos MORI, 2017 <https://www.ipsos.com/sites/default/files/2017-06/ipsos-mori-understanding-society-beyond-populism.pdf>

⁹ Cas Mudde, Understanding Society – Beyond Populism, Ipsos MORI, 2017 <https://www.ipsos.com/sites/default/files/2017-06/ipsos-mori-understanding-society-beyond-populism.pdf>

¹⁰ <https://www.ipsos.com/ipsos-mori/en-uk/six-ten-around-world-think-their-society-broken>

¹¹ This was measured in a number of ways in the survey, focusing on the economic, social and cultural impact of immigration. For more details of the questions see: <https://www.ipsos.com/sites/default/files/migrations/en-uk/files/Assets/Docs/Polls/ipsos-global-advisor-power-to-the-people-tables.pdf>

¹² <http://www.bbc.co.uk/news/world-asia-39855956>

¹³ <https://www.ipsos.com/ipsos-mori/en-uk/what-worries-world>

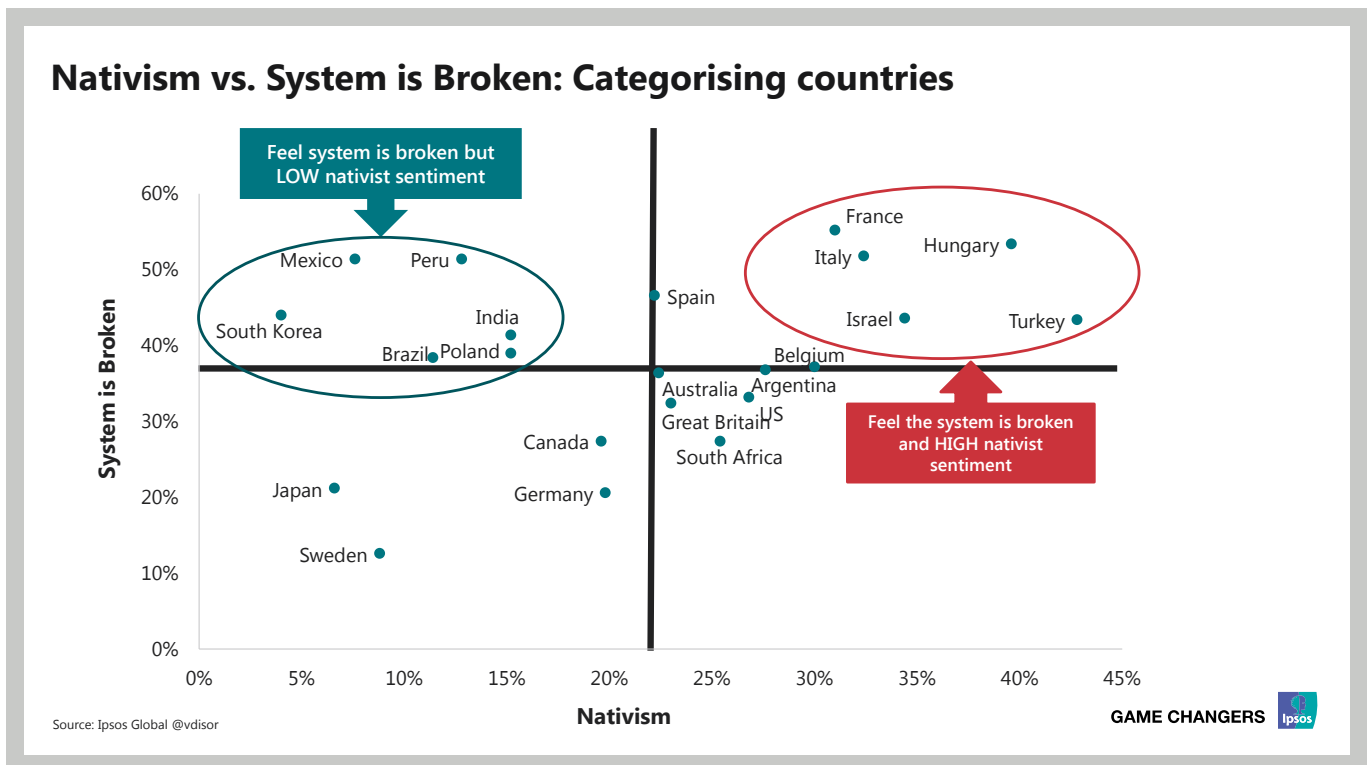


Figure 1. Source: Ipsos Global @dvisor.

The US and UK rank mid-table on both nativist views and sentiment that the system is broken. Such nativist views – negativity about the economic and cultural impact of immigration – clearly contributed towards the rise of Trump and the Brexit vote.¹⁴ This nativism (protecting the interests of native-born or established inhabitants against those of immigrants) was a powerful explanatory factor in the EU Referendum, crossing traditional political and economic dividing lines.¹⁵ And similar concerns about immigration are on display around the world, with 49% of people in 22 countries believing there are too many immigrants in their country. The UK comes in the middle of this group (13th out of 22 countries) with 49% agreeing with the statement, compared to 85% of people in Turkey and only 12% of people in Japan.¹⁶

2. Britain - a divided nation?

In Britain, recent elections have crystallised divides in society that have arguably existed for some time – the Scottish Referendum, the 2015 and 2017 General Elections, and the EU Referendum. The drivers that have shaped the outcomes of each of these votes are complex, contested and overlapping, and they should not be grouped together too simplistically. These drivers include generational differences, distinct social and economic priorities, competing views about Britain’s role in the world, perceptions of political parties and their leaders, and changes to people’s sense of national identity, among others.¹⁷

¹⁴ Understanding Society – Beyond Populism, Ipsos MORI, 2017 <https://www.ipsos.com/sites/default/files/2017-06/ipsos-mori-understanding-society-beyond-populism.pdf>
¹⁵ Shifting Ground, Ipsos MORI, 2017 https://www.ipsos.com/sites/default/files/ct/news/documents/2017-10/Shifting%20Ground_Unbound.pdf
¹⁶ https://www.ipsos.com/sites/default/files/news_and_polls/2016-08/Imm%207340.pdf
¹⁷ Goodwin, “Why Britain voted to leave the EU”, in Understanding Society – Beyond Populism, Ipsos MORI, 2017 <https://www.ipsos.com/sites/default/files/2017-06/ipsos-mori-understanding-society-beyond-populism.pdf>

But one thing is clear: there is no broad public consensus on many of the big questions facing the UK. Different groups within British society have different perceptions of the past, experiences of the present, and aspirations for the future. These differences led to an unexpected and equivocal result in the 2017 General Election, with no one party winning an overall majority across the UK, and a shift in the political landscape, particularly in Scotland.

The divisions played out perhaps most clearly during the EU Referendum campaign and result, and the consequences are continuing to frame debates about the future of Britain. The current dividing line focuses on the priorities for Britain's future relationship with the EU. Most people in Britain want the country to have both control over its immigration policy, and to remain in the single market. But this consensus breaks down when people are asked to prioritise one over the other, as it seems very likely we must – when pushed, 49% want Britain to prioritise access to the single market and 41% opt for immigration control.¹⁸

As we see again and again on these issues, the split forms between younger people and graduates who support single market access, and older people and those with fewer qualifications wanting greater control over immigration above all else. Earlier this year, the British Social Attitudes Survey described the UK as “the most divided nation in Europe” because of the attitudinal gulf between younger graduates and older school leavers on immigration.¹⁹ When it comes to being positive about the economic impact of immigration, they found a huge 46 percentage point gap between graduates aged 45 and younger (67% saying immigration has a positive economic impact) and school leavers aged 65+ (21% believing it is positive) – the biggest of any country surveyed. This is almost double the difference between groups in Ireland, where the gap is 26 percentage points, and compares with a gap of 30 percentage points in Germany. Both age and education seem to play a role in driving these attitudes. But in relation to the vote to leave the European Union at least, there is some evidence that education is the more important factor with recent analysis suggesting that access to higher education was the “predominant factor” driving divisions between remain and leave voters.²⁰ Age, on the other hand, formed perhaps the biggest dividing line in the 2017 General Election, with a bigger gap between the pro-Labour young and Conservative-supporting old than we have ever seen since our records began in 1979.²¹

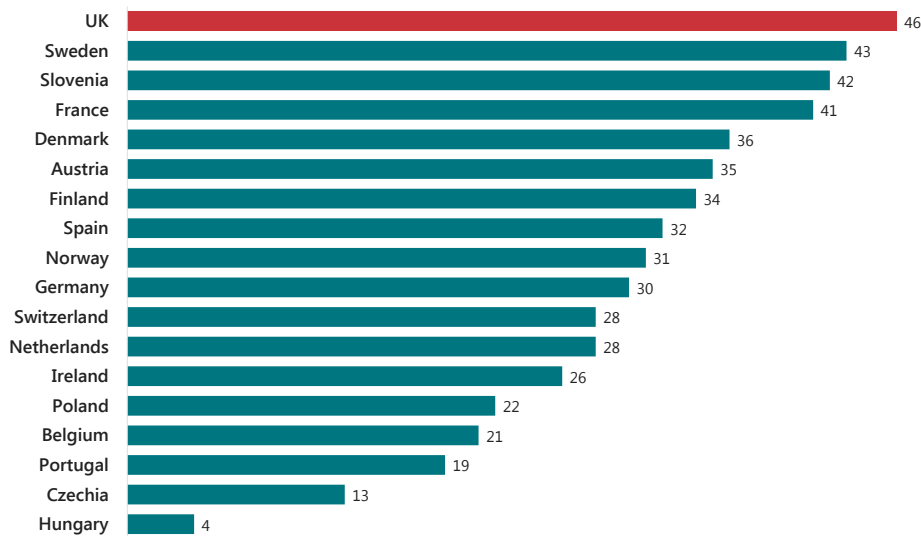
¹⁸ Political Monitor July 2017, Ipsos MORI <https://www.ipsos.com/ipsos-mori/en-uk/britons-split-single-market-access-vs-immigration-control-move-single-market>

¹⁹ British Social Attitudes Survey 34, Nat Cen http://www.bsa.natcen.ac.uk/media/39148/bsa34_immigration_final.pdf

²⁰ University of Leicester <http://www2.le.ac.uk/offices/press/press-releases/2017/august/greater-access-to-higher-education-could-have-reversed-eu-referendum-result-research-suggests>

²¹ <https://www.ipsos.com/ipsos-mori/en-uk/how-britain-voted-2017-election>

Percentage point difference between graduates aged 45 and under and school leavers aged 65+ who are positive about economic impact of immigration



Source: Nat Cen, British Social Attitudes Survey 34

GAME CHANGERS Ipsos

Figure 2. Source: Nat Cen, British Social Attitudes Survey 34.

Reflecting this, there are also different attitudes towards the cultural impact of immigration – with almost seven in ten degree holders believing immigration enriches British culture compared with only three in ten school leavers.²² In fact, of all the questions exploring immigration in the latest British Social Attitudes Survey,²³ degree holders backed every pro-migration option while school leavers only came out in favour of one – migration from the same ethnic group.²⁴ These divides are not unique to the UK – countries including Sweden, Spain and the UK are seeing a growing gulf as university graduates become increasingly positive about the economic impacts of immigration, while the views of older, less educated generations remain the same. But the depth, and the increasing breadth, of this social division sets the UK apart from the rest of Europe.

A generational divide is evident on other issues too, including optimism about the future – in Britain, only 36% of Millennials (born between 1980 and 1995 so aged 22-37) think they will have a better life than their parents, compared with 56% of Baby Boomers (born between 1945 and 1965 so aged 52-72).²⁵ This lack of optimism about individual prospects represents a significant shift in attitudes. But pessimism about the prospects of younger people spans generations with only 23% of Britons believing Millennials will have a better life than their parents.²⁶ So young people are not alone in worrying about what the future holds for their age group. These perceptions are grounded in reality – Millennials are set to be the first modern generation to be worse off than their parents with stagnation or a reduction in their disposable income and take-home pay compared to the previous generation.²⁷

²² British Social Attitudes Survey 34, Nat Cen, 2017 http://www.bsa.natcen.ac.uk/media/39148/bsa34_immigration_final.pdf

²³ British Social Attitudes Survey 34, Nat Cen, 2017 http://www.bsa.natcen.ac.uk/media/39148/bsa34_immigration_final.pdf

²⁴ British Social Attitudes Survey 34, Nat Cen, 2017, p.10 http://www.bsa.natcen.ac.uk/media/39148/bsa34_immigration_final.pdf

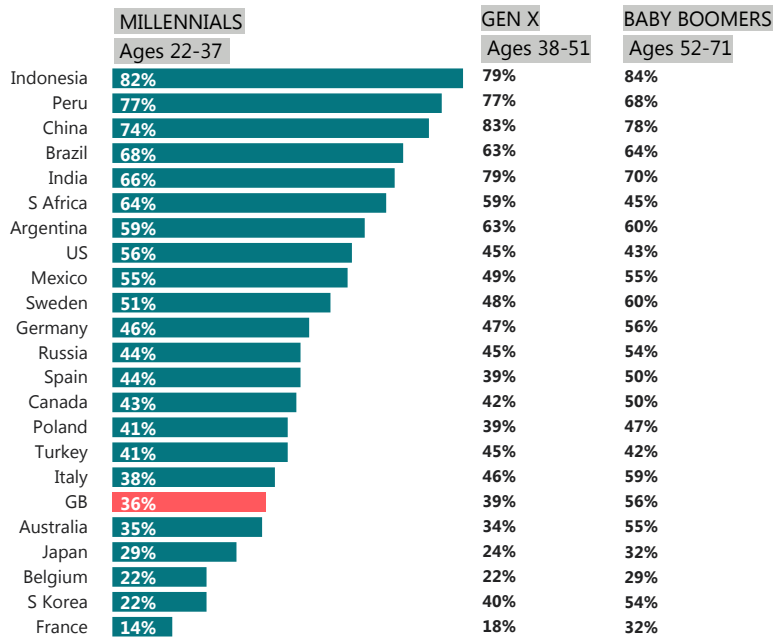
²⁵ Millennial Myths and Realities, Ipsos MORI, 2017 <https://www.ipsos.com/sites/default/files/2017-05/ipsos-mori-millennial-myths-realities-full-report.pdf>

²⁶ The Millennial Bug, Intergenerational Commission, Resolution Foundation, 2017

<https://www.ipsos.com/sites/default/files/ct/publication/documents/2017-09/the-millennial-bug-ipsos-mori-resolution-foundation.pdf>

²⁷ Millennial Myths and Realities, Ipsos MORI, 2017 <https://www.ipsos.com/sites/default/files/2017-05/ipsos-mori-millennial-myths-realities-full-report.pdf>

Percentage who feel they will have a better life than their parents



Base: 18,810 adults aged 16+ in 23 countries, fieldwork Sept– Oct 2016 | Source: Ipsos Global Trends Survey 2017

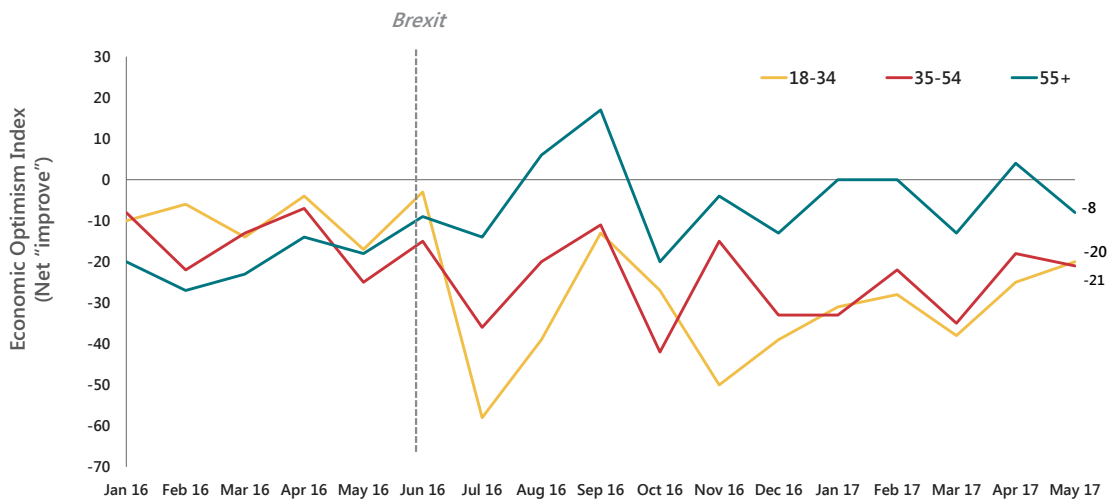
GAME CHANGERS Ipsos

Figure 3. Source: Ipsos Global Trends 2017.

Growing up in the wake of the 2008 financial crash has not only reduced the financial security of the younger generations, but it seems to have also had a lasting impact on their levels of pessimism and priorities for the future of Britain. This has been epitomised by the Brexit debate with young people wanting to maintain the status quo (whether within the EU or the customs union) and older generations more willing to take a risk for something different.²⁸ Millennials are also more likely to think the economic condition of the UK is set to get worse since the EU Referendum compared to those 55 and over. Of course, there have been generational differences in British society for many decades. However, the extent to which Millennials are falling behind older generations now is a much more worrying development, and there are few signs that this is just a temporary trend.

²⁸ <https://www.ft.com/content/278259b8-233e-11e6-aa98-db1e01fab0c0>

Do you think that the general economic condition of the country will improve, stay the same or get worse over the next 12 months?



Source: Ipsos MORI Political Monitor

GAME CHANGERS Ipsos

Figure 4. Source: Ipsos MORI Political Monitor.

These generational differences add to wider tensions that exist in society. In 2013, British people ranked tensions between immigrants and people born in the UK, tensions between tax payers and welfare claimants, and tensions between rich and poor as the top three causes of division in British society as a whole.²⁹ Of course traditional economic divides also still exist. While most people say they haven't been affected by cuts in public spending very much (although they are worried about what will happen in the future), the quarter of the population who do feel affected are more likely to be found among parents, renters, and those from BME backgrounds.³⁰ Similarly, while many are concerned about their ability to pay the bills, buy the things they are used to buying, and especially increases in the costs of goods and services, this concern is particularly high among low income groups.³¹ While public support for increasing taxes to fund government spending is at the highest level it has been in the last ten years – 48% of people in Britain now say the government should increase taxes and spend more – 44% still believe taxes and spending should remain the same.³²

These differences need to be placed in the context of how the population of the UK is changing. The UK population is forecast to become the largest in Europe by 2050, reaching 77.2 million people.³³ At which point, a quarter of the population will be over the age of 65.³⁴ At the same time, the ethnic and cultural diversity of the country is likely to continue to grow, with some projections suggesting the ethnic minority share of the population may increase to 20% -

²⁹ British Future survey, 2013 <http://www.britishfuture.org/wp-content/uploads/2013/01/State-of-the-Nation-2013.pdf>

³⁰ <https://www2.deloitte.com/content/dam/Deloitte/uk/Documents/public-sector/deloitte-uk-state-of-the-state-2016-report.pdf>

³¹ <https://www.ipsos.com/ipsos-mori/en-uk/nationwide-explores-consumer-confidence-following-referendum>

³² http://www.bsa.natcen.ac.uk/media/39145/bsa34_role-of-govt_final.pdf

³³ http://ec.europa.eu/eurostat/statistics-explained/index.php/People_in_the_EU_%E2%80%93_population_projections

³⁴ <http://www.parliament.uk/business/publications/research/key-issues-for-the-new-parliament/value-for-money-in-public-services/the-ageing-population/>

25% over the same timeline.³⁵ It is as yet uncertain how the decision to leave the EU will impact on these projections, but the overall trend is clear.

Whatever happens, demographic changes are unlikely to occur uniformly across Britain. There are already significant differences between London and the rest of the country. London is the most ethnically diverse area, with 60% of Londoners identifying as White British compared with 86% in England and Wales as a whole.³⁶ Wealth is also concentrated in London, with average house prices and the median salary in the capital distinctly higher than elsewhere.³⁷ Unsurprisingly, the concerns of Londoners are also different. Housing topped the list of the most important issues facing Britain in 2016 for those in the capital, compared with the rest of Britain where immigration was the greatest concern.³⁸ This mirrors data from the first half of 2017, with 28% of Londoners ranking housing as one of the main issues facing Britain compared to 16% of Britain overall.³⁹ And these differences are set to increase as population growth remains concentrated in the South.⁴⁰

This will have policy and political implications as individual identities could become increasingly linked to more local geographies above the UK as a whole. This is a trend already being realised to some extent, as people increasingly identify with England, Scotland and Wales above a shared British identity.⁴¹ While the largest proportion of people in England still consider themselves to be equally English and British (38%), 35% of people feel more English (including 19% who stated they are “English and not British”) – an increase from 1997 when 24% saw themselves as more English than British (including 7% who said they were “English and not British”).⁴² By contrast in Scotland, Scottish identity has long had primacy over the British identity, with 59% considering themselves more Scottish than British in 1992 and 56% saying the same thing now.⁴³ The proportion with an exclusively Scottish identity has risen too, from 19% 25 years ago, to 28% now.

3. What brings Britain together?

Despite these very different views about the challenges we face and the future direction of the country, there are still things most of us do agree on.

In among the clichéd tea-drinking and sense of fair play, there is evidence of a distinctly British outlook and a set of shared values. Respect for freedom of speech, even when you disagree, was ranked by the public as the most important attribute of being British.⁴⁴ Along with respect for the law, the ability to speak English and the desire to contribute positively to society, these values are widely regarded across demographic groups as having a good claim to being foundations for a shared sense of British values.

³⁵ Philip Rees, Pia Wohland, Paul Norman, Peter Boden, *Journal of Population Research*, 2012

<https://link.springer.com/article/10.1007%2Fs12546-011-9076-z>

³⁶<https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/ethnicity/articles/ethnicityandnationalidentityinenglandandwales/2012-12-11>

³⁷ [http://www.nationwide.co.uk/about/house-price-index/download-data#xtab:uk-series:](http://www.nationwide.co.uk/about/house-price-index/download-data#xtab:uk-series;)

<https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/bulletins/annualsurveyofhoursandearnings/2017-provisionaland2016revisedresults>

³⁸ Ipsos MORI Issues Index (January – December 2016)

³⁹ Ipsos MORI Issues Index (April – June 2017). <https://www.centreforlondon.org/reader/the-london-intelligence-issue-1/society/#issues-index>

⁴⁰<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/bulletins/subnationalpopulationprojectionsforengland/2014basedprojections>

⁴¹ <https://yougov.co.uk/news/2017/01/24/what-makes-person-english-according-english/>

⁴² <http://www.bsa.natcen.ac.uk/latest-report/british-social-attitudes-30/devolution/trends-in-national-identity.aspx>

⁴³ <https://yougov.co.uk/news/2016/09/07/what-makes-person-scottish/>

⁴⁴ <http://www.britishfuture.org/articles/common-sense-fair-play-british-values/>

Britons are also committed to personal autonomy and the freedom to make individual lifestyle choices. Across generations, support for same-sex relationships, abortion and pre-marital sex is growing, with 75% of people now saying that sex before marriage is “not at all wrong”.⁴⁵ Britain is becoming an increasingly socially liberal nation. This is a trend reflected around the world, where support for individual lifestyle choices including attitudes to gay rights and gender equality are on the up – 74% of people surveyed across 22 countries agreed that gay men and women should be free to live their own life as they wish.⁴⁶ 87% of Britons were of this view, with Britain ranking joint fourth out of the 22 countries in the research. Similarly, a large majority of Britons say they are comfortable being around people with different religious beliefs – 85% of people in Great Britain compared with a global average of 74% and ranking joint fifth out of 23 countries.⁴⁷ South Africans are the most comfortable being around people from other religions, with nine in ten agreeing, compared to 58% in Japan, the lowest in the survey. On the other hand, British people are more likely than the global average to think religion does more harm than good – six in ten agree, in line with similar attitudes found in other Western European countries (62% agree in Sweden and 61% in France) and joint fifth out of 23 countries. Of the countries surveyed, people in Belgium are the most likely to agree that religion does more harm than good (68%, compared with Japan where 26% agree).

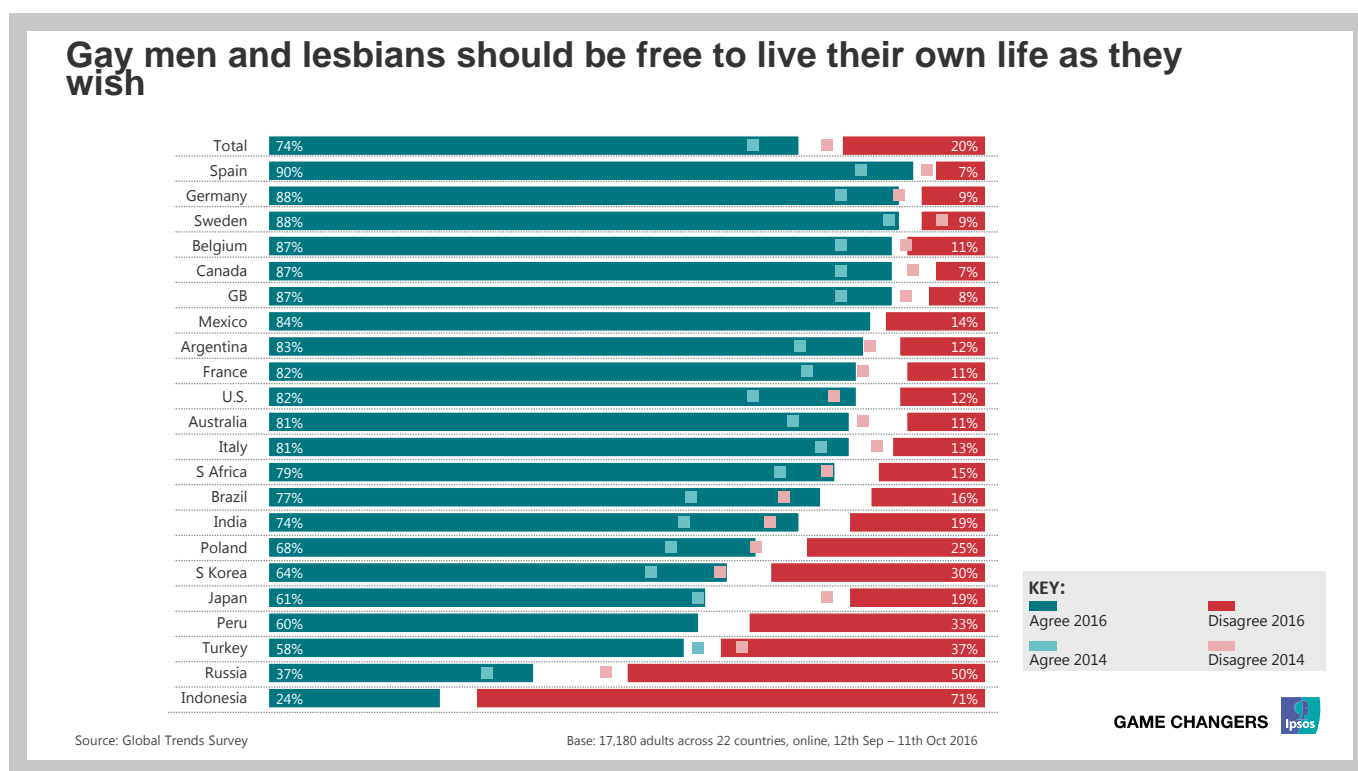


Figure 5. Source: Ipsos Global Trends.

While we are increasingly socially liberal, when it comes to civil liberties, security takes priority with British people concerned that government is able to take action: 80% agree the government should have the right to keep people under video surveillance in public areas and 70% think the government should be able to stop and search people in the street at

⁴⁵ British Social Attitudes Survey 34, Nat Cen, 2017 http://www.bsa.natcen.ac.uk/media/39147/bsa34_moral_issues_final.pdf

⁴⁶ Global Trends Survey, Ipsos MORI, <https://www.ipsosglobaltrends.com/rights-of-gay-men-and-lesbians/>

⁴⁷ Global views on religion, October 2017, Ipsos MORI <https://www.ipsos.com/ipsos-mori/en-uk/global-study-shows-six-ten-britons-above-global-average-believe-religion-does-more-harm-good>

random.⁴⁸ This reflects our concern about the future with 80% of Britons feeling that we live in an increasingly dangerous world. This is not just a British phenomenon, as our high levels of anxiety mirror global trends.⁴⁹

We share a reliance on technology too, which is playing a greater role in British home life. Nine in ten households (90%) now have access to the internet.⁵⁰ However, there are marked differences between generations in the devices used to get online – Millennials (adults aged 22 – 37 in 2017) and Generation X (adults aged 38 – 51 in 2017) are much more likely to access the internet through their phones compared to older groups.⁵¹ In Britain we appear to be particularly attached to our online access, with 78% of people agreeing that they cannot imagine life without the internet, coming joint second with South Africa out of 23 countries where online populations were surveyed.⁵² This compares to 73% in Germany and in the US, and a comparatively low 64% in France and 62% in Japan.⁵³

Britain is also similar to many other developed countries in our attitudes to material success, compared with views in emerging markets where people place more premium and pressure on hard work and achieving success. For example, 85% of Brits think it is more important to have a good work-life balance than to have a successful career. This compares with 81% of Americans and 71% of people in Japan. Mexico comes bottom, with a comparatively low 70% of people agreeing that it is more important to have a good work-life balance, while Germany tops the list on 88%.⁵⁴ Out of 23 countries, only Germany, Spain and Belgium put more emphasis on getting work-life balance right than we do in Britain (we are also level with Australia and Canada on 85%). Similarly, only 33% of us agree that fulfilment in life is achieved through a prominent position at work, making us the fifth least likely to believe this. Globally, this ranges from 75% of Indians through to 24% of Germans believing this is the case.⁵⁵

Beyond our borders, people from the UK have a reputation for being polite, educated and friendly, but also for drinking too much and having bad eating habits.⁵⁶ Britons themselves agree, with 42% identifying drinking too much as one of the worst characteristics of being British. In contrast, a good sense of humour is the most commonly mentioned positive national characteristic (47%).⁵⁷ We are also seen as trustworthy – coming second only to Canada as a country with “people you can trust”.⁵⁸ British culture and history seem to have particular resonance abroad – they are regarded as driving the UK’s attractiveness, with Britain coming in fourth place in a world ranking of arts and culture.⁵⁹ And in terms of British attitudes to the rest of the world, only a small minority of Britons want the country to reduce its global influence, and we remain open (Britons, for example, are more likely than many other countries to believe that opening up our economy to foreign businesses and trade is an opportunity rather than a threat).⁶⁰ The majority believe that setting an example in the values we believe in will be important for maintaining Britain’s influence in the world, and that Britain is a force for good,

⁴⁸ British Social Attitudes Survey 34, Nat Cen, 2017 http://www.bsa.natcen.ac.uk/media/39146/bsa34_civil-liberties_final.pdf

⁴⁹ Global Trends Survey, Ipsos MORI <https://www.ipsosglobaltrends.com/danger-of-world-increasing/>

⁵⁰ ONS

<https://www.ons.gov.uk/peoplepopulationandcommunity/householdcharacteristics/homeinternetandsocialmediausage/bulletins/internetaccesshouseholdsandindividuals/2017>

⁵¹ Millennial Myths and Realities, Ipsos MORI, 2017 <https://www.ipsos.com/sites/default/files/2017-05/ipsos-mori-millennial-myths-realities-full-report.pdf>

⁵² N.B. The Global Trends Survey is an online survey, and in countries such as India and South Africa where overall internet penetration is lower, the samples represent the views of the upper middle class population, rather than the general population.

⁵³ Global Trends Survey, Ipsos MORI <https://www.ipsosglobaltrends.com/life-without-the-internet/>

⁵⁴ Global Trends Survey, Ipsos MORI <https://www.ipsosglobaltrends.com/work-life-balance-vs-successful-career/>

⁵⁵ Global Trends Survey, Ipsos MORI <https://www.ipsosglobaltrends.com/fulfilment-from-career/>

⁵⁶ <https://www.britishcouncil.org/sites/default/files/as-others-see-us-report-v3.pdf>

⁵⁷ <https://www.ipsos.com/ipsos-mori/en-uk/six-ten-prefer-be-british-any-country-earth>

⁵⁸ <https://www.britishcouncil.org/sites/default/files/as-others-see-us-report-v3.pdf>

⁵⁹ <https://www.britishcouncil.org/sites/default/files/as-others-see-us-report-v3.pdf>

⁶⁰ <https://www.ipsos.com/en/global-study-shows-potential-more-political-uncertainty-ahead>

and should try to punch its weight.⁶¹ Despite Brexit, and the majority feeling that Britain should try to focus more on its own problems, three in four still believe we should continue to work closely with the EU on issues beyond trade.⁶²

Our traditions are important to us, too. 81% of Britons think traditions are an important part of society in comparison with 90% in Indonesia and 66% of people in Japan. While the role of traditions is clearly important, our nostalgia for the past is more complex. Six in ten of us think the world is changing too fast and that people led happier lives in the old days, but on both measures this puts us near the bottom of the 23 countries surveyed. So, traditions remain an important part of life in Britain and our shared sense of Britishness, but we don't all want to go back to "the good old days".

At their best, British institutions also bring us together. Our pride in the NHS is a unique facet of British identity and the NHS is a rare institution in receiving near universal support across the population.⁶³ But people are increasingly worried about the future of the health service – we are the most pessimistic country in the world when asked whether we think healthcare will improve. Only 8% of us think it will, and 83% of Britons are in favour of increasing government spending on health.⁶⁴ In contrast, 71% of people in Brazil and 24% of Americans expect the quality of their healthcare to improve.

Similar institutions, such as the armed forces, receive high levels of public support too, with 95% of people saying they respect the UK armed forces, including three quarters of people who have a "great deal of respect".⁶⁵ Although younger age groups report slightly lower respect than older generations, with positive views steadily increasing with age, admiration for the armed forces spans across the age and educational divides described above.

The monarchy has also maintained a central position in British society, with 68% of the public believing the monarchy is good for the country and 71% of adults wanting the institution to remain, compared to 18% who would like to see monarchy replaced by an elected head of state.⁶⁶ This mirrors what the rest of the world thinks – in a study across five countries, the Royal family topped the list of attributes as something people in the UK have a right to be proud of, selected by four in ten of those surveyed.⁶⁷ We are also proud of our history, with 43% of people saying this makes them proud to be British, coming second only to the NHS (50%) ahead of both the Royal Family (31%) and the armed forces (24%).⁶⁸

A recent survey comparing what people of the country should feel proud of in the UK, USA, Canada, Australia and New Zealand further highlighted the significance of institutions in UK life and our shared identity. Although every country surveyed ranked "scenery and wildlife" at number one, the other attributes topping the UK's list are all publicly funded or subsidised, and include the NHS, the Armed Forces and culture and arts. Pride in TV also seems to be a particularly British attitude, with the country's TV appearing fifth in the UK rankings. A majority (57%) of people say this is something people in the UK should be proud of, while TV did not make it into the top ten of any of the other countries surveyed. Mirroring this, the BBC is the national broadcaster to appear highest in the rankings for their country. Again, a majority (53%) believe the BBC is something people in the UK should be proud of (in sixth place overall). This compares with ninth place for PBS in the USA, 11th place for ABC in Australia, and 13th place for the CBC in Canada. While lower down the rankings, Americans are on a par with the British in terms of levels of pride.

⁶¹ <https://www.ipsos.com/ipsos-mori/en-uk/poll-british-influence>

⁶² <https://www.ipsos.com/ipsos-mori/en-uk/poll-british-influence>

⁶³ <https://www.kingsfund.org.uk/publications/what-does-public-think-about-nhs>

⁶⁴ Global Trends Survey, Ipsos MORI <https://www.ipsosglobaltrends.com/future-of-local-healthcare-quality/>

⁶⁵ British Social Attitudes Survey 29 Nat Cen http://www.bsa.natcen.ac.uk/media/1150/bsa29_armed_forces.pdf

⁶⁶ <https://yougov.co.uk/news/2015/09/08/monarchy-here-stay/>

⁶⁷ <https://www.britishcouncil.org/sites/default/files/as-others-see-us-report-v3.pdf>

⁶⁸ <https://www.ipsos.com/ipsos-mori/en-uk/six-ten-prefer-be-british-any-country-earth>

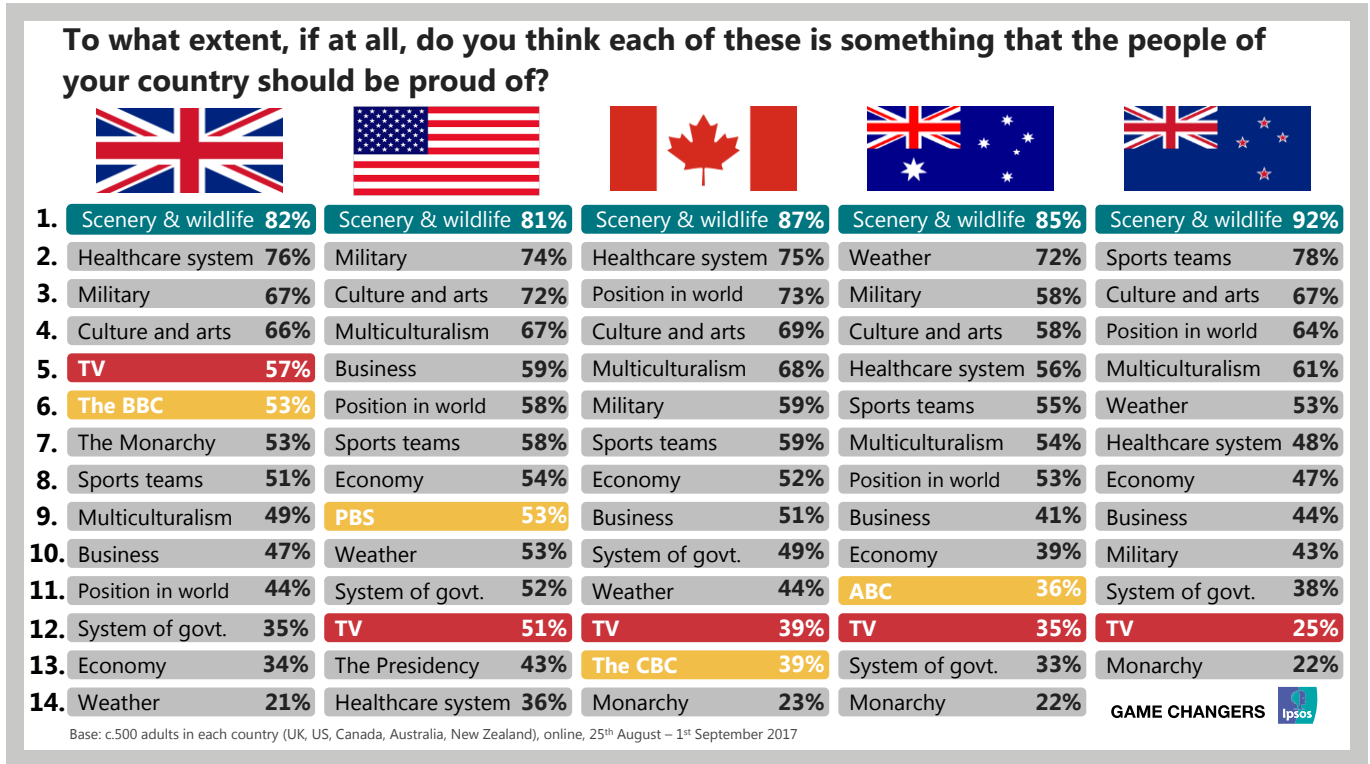


Figure 6. Source: Ipsos MORI / Populus.

Overall then, despite all the political upheavals and social change in recent years, Britons have a shared sense of values and a shared set of attitudes about what we think we should be proud of. While 71% of Britons believe that people across the world have more in common than divides us, only 13% of us would rather be a citizen of another country.⁶⁹ Of course, the future is always uncertain, but the current evidence suggests that these shared values are likely to stay with us. Generational shifts mean socially liberal attitudes are likely to continue to become more widespread, while our pride in the institutions of the UK and our celebration of a good sense of humour are shared by different types of people across the country.

4. Why does British content matter?

Although many people in Britain believe our TV is something we should be proud of, in many ways the UK is increasingly fragmented, and this extends to the media content we consume, and how we consume it. With the rapid multiplication of choice across platforms and providers, consumers now have access to an almost endless array of TV and other media content. This means that high-quality content funded and produced around the world – mostly in the US – is now increasingly important for many UK consumers.⁷⁰ Established broadcasters and subscription services like HBO and Netflix invest large sums in producing high-quality content, particularly dramas and factual programmes. And the best of this content has been critically and commercially successful around the world.⁷¹

⁶⁹ <https://www.ipsos.com/ipsos-mori/en-uk/six-ten-prefer-be-british-any-country-earth>
⁷⁰ <https://www.theguardian.com/media/2017/jul/18/netflix-tops-100m-subscribers-international-customers-sign-up>
⁷¹ <http://uk.businessinsider.com/most-popular-tv-shows-2016-12>

These changes in the content landscape and how audiences consume TV are a significant challenge for established broadcasters and content creators in the UK, including the BBC. Given these challenges, what is the role for British content? How much do audiences value content produced for and in the UK?

British content is highly valued – but there are challenges ahead

While it has declined over recent years, watching live TV remains an important shared pastime for most Britons. Overall, in 2016, we spent an average of 3 hours 32 minutes a day watching broadcast TV on our TV sets, down only 4 minutes on 2015.⁷² Although watching too much TV is often seen in a negative light, the public point to the positive role it can play in family life. Ofcom research shows that two-thirds of adults (68%) agree that watching TV programmes or films brings the family together, and seven in ten (70%) watch the same programmes or films together at least once a week.⁷³

We have already seen that British television seems to hold a special place in the heart of Britons. But digging a little deeper, there are obvious and significant long-term challenges for broadcast TV. In particular, the gap between the viewing habits and preferences of the youngest and oldest audiences is widening. This Ofcom research also shows that the steepest decline in average viewing of broadcast TV in 2016 was among children (4-15) and adults aged 16-24. Online platforms are increasingly replacing broadcast TV for the youngest audiences: 66% of teens used YouTube to watch TV programmes/films compared with 38% of all adults in 2017. These trends will have implications for the ability of content to bring different types of people together in the way it has in the past.

But while there are challenges for broadcasters in terms of reaching different types of people, British content continues to be highly valued by the British public, irrespective of how people access it. The top 1,500 TV programmes most viewed in the UK in 2017 so far have been home-grown – the first TV programme from outside the UK (Lethal Weapon (series) shown on ITV) ranks 1,493.⁷⁴ The most popular UK programmes such as Strictly Come Dancing, Britain's Got Talent, Planet Earth II, Broadchurch, The Great British Bake Off and Sherlock continue to draw huge audiences, and provide opportunities for shared conversations and experiences across backgrounds and generations.

Coverage of big sporting and other national events also brings large numbers of people together. More than 24 million viewers in the UK watched the wedding of Kate Middleton and Prince William on the BBC and ITV.⁷⁵ In 2012, 91% of the UK TV-owning population watched BBC's Olympics coverage.⁷⁶ The opening ceremony of the Olympics celebrated British history, culture and institutions – including the NHS, armed forces and the monarchy – and was watched by an estimated one billion people around the world. Large national events like this do seem to bring Britain together – 75% of us believed the Olympics showed Britain to be a "confident, multi-ethnic country".⁷⁷ A year on, in July 2013, 78% of people still believed the Olympics had a positive impact on how Britain is viewed by the rest of the world, keeping the feel-good factor of 2012 going both at home and abroad.⁷⁸ Indeed, three-quarters of those living in Britain during the Olympics said they supported all Team GB athletes with equal passion regardless of where they were born. More recently, over 15 million people watched the Euro 2016 clash between England and Iceland, more than 11 million watched the Wales versus Belgium quarter-final, and more than 9 million watched Andy Murray win Wimbledon last year.⁷⁹

⁷² BARB, individuals 4+, network, total TV. Average hours and minutes of viewing per day.

https://www.ofcom.org.uk/_data/assets/pdf_file/0019/103924/psb-annual-report-2017.pdf

⁷³ https://www.ofcom.org.uk/_data/assets/pdf_file/0017/105074/cmr-2017-uk.pdf

⁷⁴ BARB, 1 Jan-1 Oct 2017

⁷⁵ <http://www.bbc.co.uk/news/entertainment-arts-13248199>

⁷⁶ <https://www.theguardian.com/media/2012/aug/13/bbc-olympics-coverage-tv-ratings>

⁷⁷ <https://www.ipsos.com/ipsos-mori/en-uk/britons-surprised-how-olympics-brought-country-together>

⁷⁸ <https://www.ipsos.com/ipsos-mori/en-uk/lifting-mood-olympic-legacy>

⁷⁹ BARB, 2016

In 2016, the public service broadcasters (PSBs) – those providing Channel 3 services (ITV/STV/UTV), Channel 4, Channel 5, S4C and the BBC⁸⁰ – retained more than half of the total broadcast TV audience. Ofcom measures public views of PSB content against five characteristics: whether it is distinctive, high quality, original, innovative, and challenging. While the way PSB content is consumed may be changing, the perceived importance of all five measures has increased over recent years. In 2016, 83% of the public said that PSB broadcasters showing new programmes made in the UK is important to them (Figure 7), up from previous years.⁸¹ In a world of often overwhelming choice, audiences are increasingly emphasising the value of high quality, original programmes, and content made in the UK.

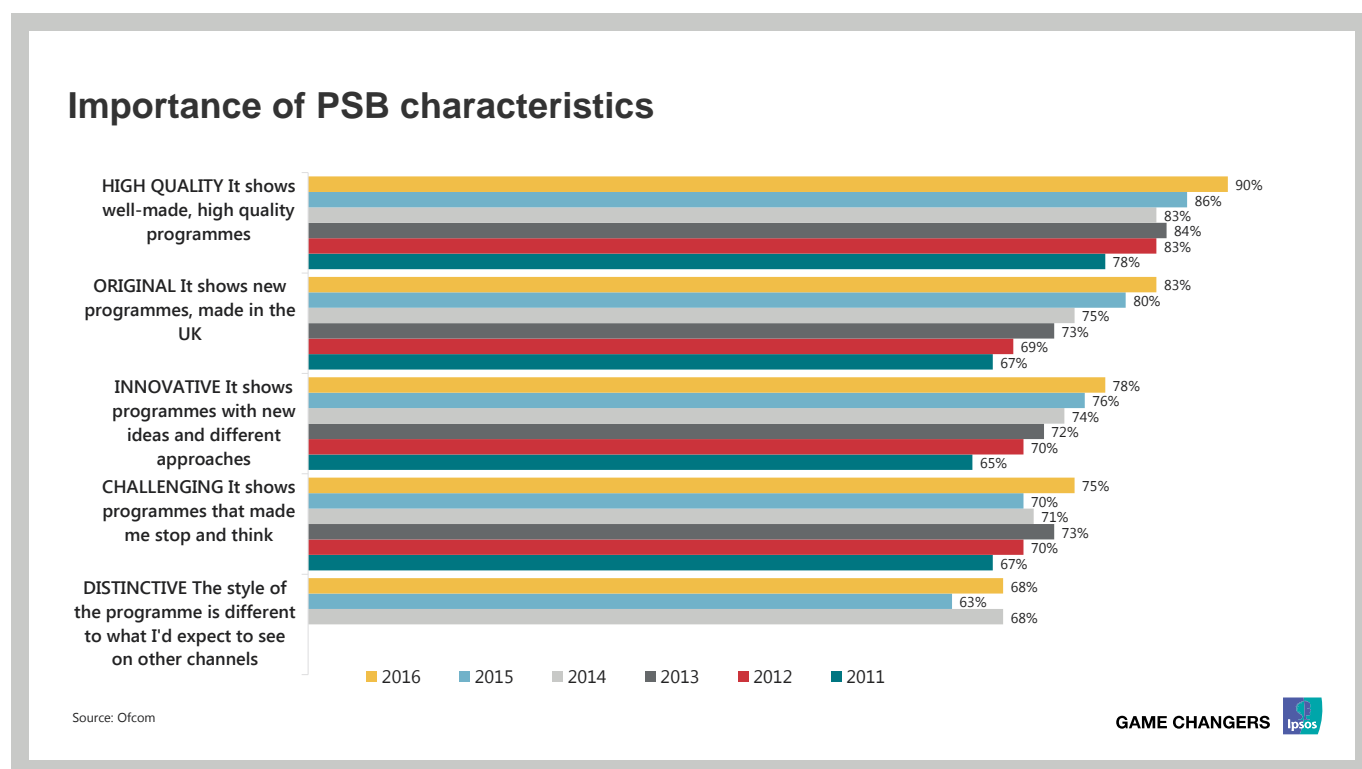


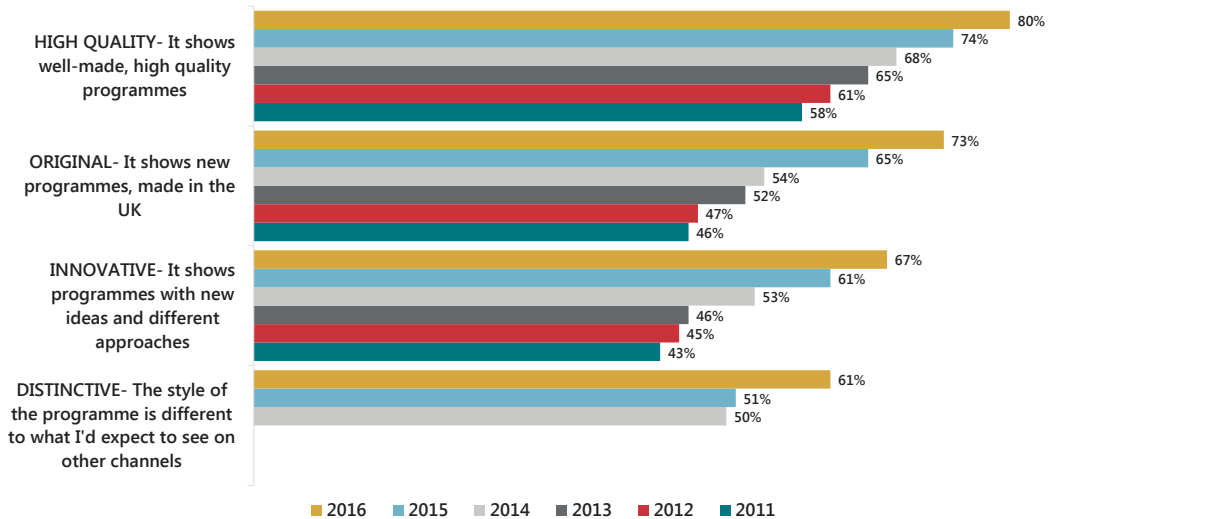
Figure 7. Source: Ofcom.

While their increasing importance is clear, how are PSBs perceived to be performing against these measures? There have also been significant increases across the board in the performance of PSBs against all these measures. In particular, around three-quarters (73%) of viewers now say the PSBs deliver on “showing new programmes, made in the UK”. UK content has increased in importance to viewers, and they also think the PSBs are getting better at producing new home-grown programmes.

⁸⁰ While all BBC public service television channels are PSB channels, only the main channels of each of the other PSBs have this status.

⁸¹ https://www.ofcom.org.uk/_data/assets/pdf_file/0019/103924/psb-annual-report-2017.pdf

The delivery of PSB characteristics



Source: Ofcom

GAME CHANGERS Ipsos

Figure 8. Source: Ofcom.

BBC channels have been at the forefront of this improving performance. In particular, BBC One was rated significantly higher than the combined score for PSBs across eight of 12 purposes and characteristics measured by Ofcom, as shown in Figure 9.⁸² In terms of perceptions of UK content on BBC One, eight out of ten viewers (79%) said the channel delivers on “showing new programmes, made in the UK”, a significant increase on 2015 (70%), and significantly higher than for PSBs overall (73%). There was also an improvement for BBC One on “shows different cultures within the UK” (72% BBC One viewers vs. 65% in 2015) and “shows high-quality comedy made in the UK” (67% vs. 61% in 2015).⁸³

⁸² https://www.ofcom.org.uk/_data/assets/pdf_file/0019/103924/psb-annual-report-2017.pdf

⁸³ https://www.ofcom.org.uk/_data/assets/pdf_file/0019/103924/psb-annual-report-2017.pdf

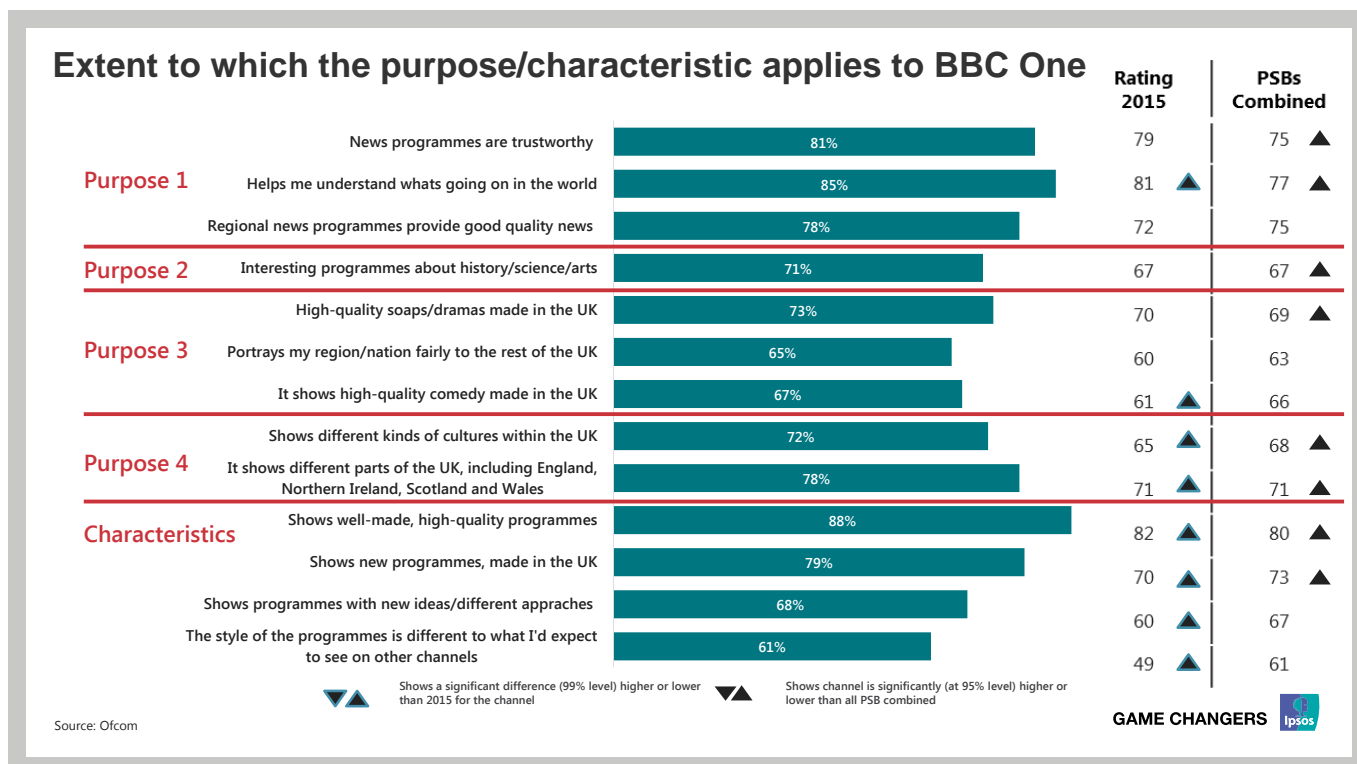


Figure 9. Source: Ofcom.

This appreciation of the BBC is reiterated in a further Ofcom study looking at the distinctiveness of the broadcaster.⁸⁴ A significantly higher proportion of viewers are highly satisfied with BBC TV over free-to-view TV channels, with 51% giving BBC TV a score of 8-10 out of 10. This compares to one in three feeling the same about ITV/STV/UTV combined (37%) and Channel 4 (34%) and less than one in five for Channel 5 (18%). The satisfaction ratings of BBC are reasonably balanced across age groups: 16-34s (51%), 35-54s (54%) and over 55s (50%), with a small variation between ABC1 (54%) and C2DE (48%) audiences.

British content needs to reflect diversity better in the UK

New, high quality programming that appeals to people in the UK is very important to audiences. 50% of viewers also think that it is highly important for BBC TV to show programmes specifically for UK audiences; however, it is not the only important role for British content producers. Audiences also want TV content to reflect the diversity of modern Britain. The recent Ofcom report looking at the distinctiveness of the BBC illustrates that viewers felt strongly about wanting to see a mix of different types of programmes (71%), to see programmes appealing to a wide range of different audiences in the UK (68%), and wanted to take a chance on programmes based on new/innovative ideas (55%). Indeed, one of the BBC's Public Purposes is to "reflect, represent and serve the diverse communities of all of the UK's nations and regions and, in doing so, support the creative economy across the UK". But the increasing fragmentation of audiences brings significant challenges for an organisation like the BBC.

This research for Ofcom also suggests the public feel there is an important role for the BBC to lead on reflecting the diversity of the UK.⁸⁵ Given the BBC's public funding and role in British culture, participants said it was important that the BBC produced content to serve a range of audiences, and that they expect more from the BBC than other broadcasters in this respect. While acknowledging what the BBC already does, participants felt the BBC could do more to reflect and serve

⁸⁴ https://www.ofcom.org.uk/_data/assets/pdf_file/0022/104557/bbc-distinctiveness-research.pdf

⁸⁵ www.ofcom.org.uk/_data/assets/pdf_file/0026/99521/bbc-distinctiveness-research-executive-summary.pdf

different audiences across the UK, for example in terms of age, nation, ethnic background, and social class, particularly on mainstream TV. Participants also felt that the BBC should continue to have original, UK produced content on TV and radio to support UK writers, actors, musicians and presenters. This was viewed as an important part of the BBC's role in society.

These findings highlight the unique role the BBC plays in British society. In terms of character, it is viewed as an important British institution with the history and place in national life that goes alongside its funding method and its remit. But it is also seen as distinctive for the quality of its output, its reliability, and its professional tone.

Of course, the BBC already provides a range of content and services, catering to different types of audiences. A recent survey found that the BBC reaches 99% of households each week, but the mix of services they use varies hugely. From a sample of 1,038 households, 791 used their own unique combination of BBC services.⁸⁶

In adapting to a changing Britain, the BBC needs to balance bringing people across the UK together through British content with broad appeal, while also reflecting the lives and experiences of very different communities across the country. Content from outside the UK is unlikely to achieve either of these aims on its own, and the BBC is in a strong position to lead the British TV industry in doing both – at least in terms of public perceptions. The BBC has already set out plans to address these challenges.⁸⁷

The media landscape has been transformed beyond recognition since the BBC was founded in the 1920s. The pace of change in the past decade in particular has been rapid, driven by the switch to digital broadcasting, the rise of broadband internet and the rapid take-up of tablets and smart phones.

In the face of this changing media landscape, the BBC continues to reach almost all of the UK adult population on a weekly basis. However, this hasn't happened by standing still. British society and its institutions have all had to adapt to stay relevant and thrive as Britain changes and the trends outlined above suggest there will continue to be big challenges ahead.

5. Conclusion

Over recent years, Britain has been characterised as an increasingly divided nation. And the evidence suggests many of the divides are real. Recent political events have highlighted – and perhaps exacerbated – differences in outlook and priorities based on age, education, and where we live in the country. The generational differences are particularly glaring, dividing on key issues like immigration, as well as on optimism for the future. Demographic and population changes have the potential to embed these divisions further.

Yet, there are many attitudes and experiences we still share. There are some simple and broadly agreed British values, focusing on freedom of speech, the rule of law, and the desire to contribute positively to society. Our institutions bring us together too: particularly the NHS, but also the monarchy, the armed forces, and our sports teams, and we emphasise the importance of what we do outside work. In common with much of the world, Britain is increasingly socially liberal, with attitudes having shifted significantly over recent decades in support of personal autonomy and the freedom to make individual lifestyle choices.

In this complex landscape, the media content we consume, and how we consume it, is changing. There is now overwhelming choice available. But broadcast TV – and particularly British content on TV – remains a key part of national

⁸⁶ http://downloads.bbc.co.uk/aboutthebbc/insidethebbc/reports/pdf/bbc_charter_review_audiences_appendix.pdf

⁸⁷ http://downloads.bbc.co.uk/aboutthebbc/insidethebbc/howwework/reports/pdf/BBC_Annual_Plan_2017-18.pdf

life, representing the most popular programmes watched by millions of people, and highly valued by the public. At its best, British TV content still brings people together, and has the potential to continue doing so. Indeed, audiences are increasingly emphasising the importance of high quality, original programmes and content made in the UK. They are also increasingly positive about how well the PSB broadcasters are delivering this content.

All of this brings significant challenges and opportunities for broadcasters, not least the BBC. Public broadcasters are seen to be leading the way on producing new UK content, and on reflecting life in different parts of the UK. But the public have high expectations of the BBC because of the way it is funded and its unique role in British society. The BBC – and other commissioners and producers – will need to keep innovating and adapting to ensure British content remains reflective of life in the UK in all its variety, so it can continue to be enjoyed and valued across the UK and beyond.

Ben Page

Chief Executive

Daniel Cameron

Research Director

Hannah Whyte-Smith

Associate Director

Sophie Wilson

Research Manager

For more information

3 Thomas More Square
London
E1W 1YW

t: +44 (0)20 3059 5000

www.ipsos-mori.com

<http://twitter.com/IpsosMORI>