

ITM Travel Conference

Is Britain feeling
empowered?

**Gideon Skinner, Research Director
Ipsos**

@GideonSkinner



Be gentle

What proportion of Britons say they are 'nervous flyers'?

1. **5%**
2. **14%**
3. **29%**



29%



In July 1998 **40%** thought Britain was getting worse as a place to live

In May 2008 **71%** thought Britain was getting worse as a place to live

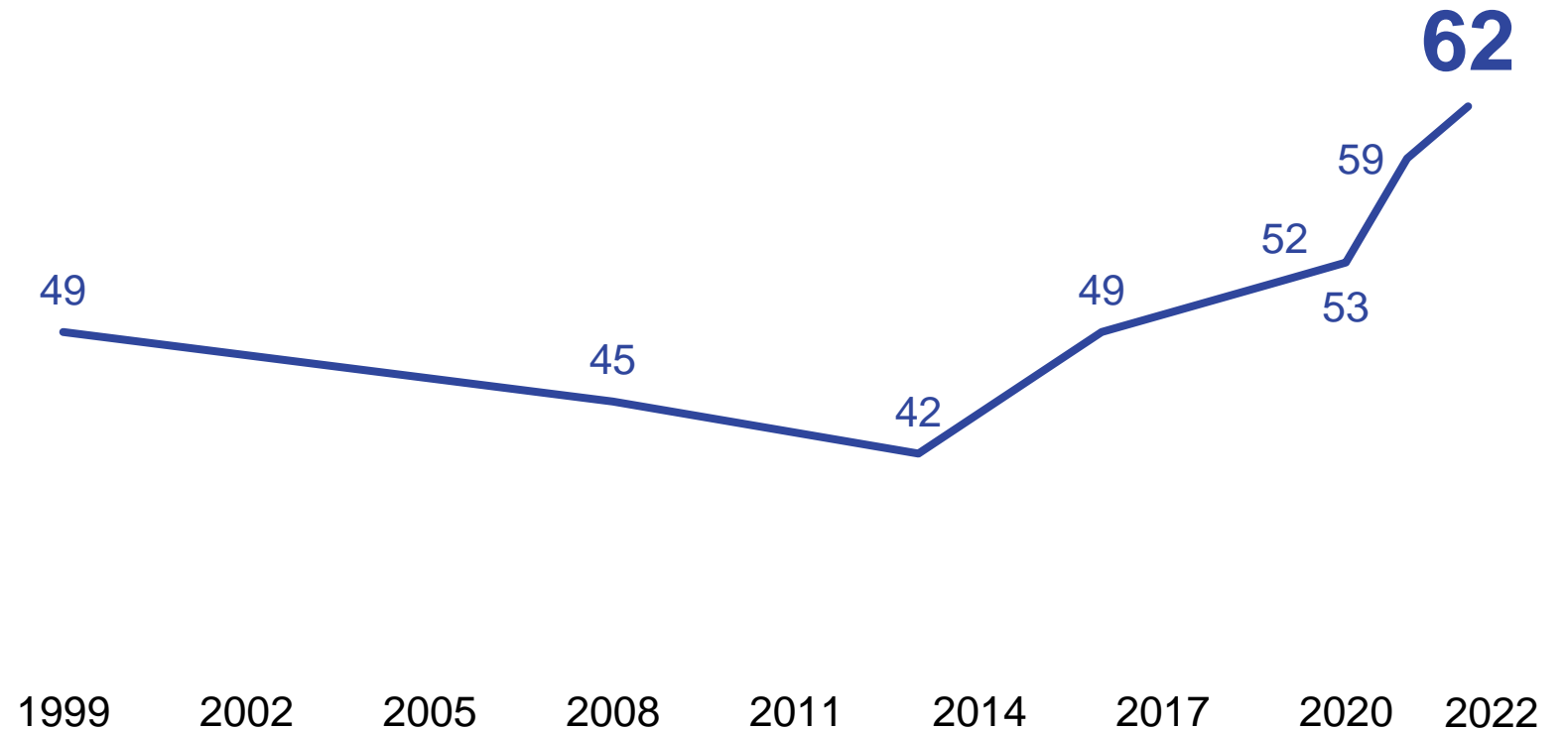
By July 2023 it was **76%**

Source: Ipsos Political Monitor

People increasingly feel overwhelmed by this world

“I wish I could slow down the pace of my life”

% agree, Great Britain



Ipsos Global Trends series 2013 – 2023; 1999 data point Socioconsult; 2008 Real Trends.

Which is taking its toll on our mental health

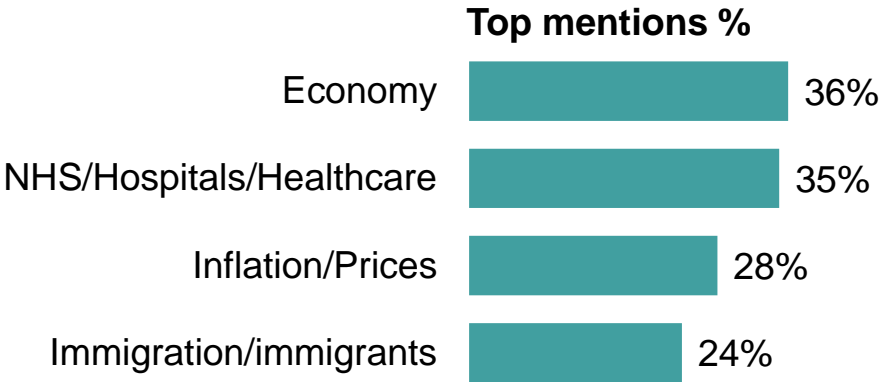
44% see mental health as the
**biggest health problem facing
their country** – the biggest global
health concern in 2023

53% in Great Britain, up
10ppt since 2022

Source: Ipsos Global Health Service Monitor 2023
Base: 23,274 adults in 31 countries, 21 July – 4 August 2023.

The public's top four issues are the economy, NHS, inflation and immigration

What do you see as the most/other important issues facing Britain today?



| Change since March 2023: | |
|--------------------------|----------|
| % | Position |
| -1 | +1 ▲ |
| +14 | +1 ▲ |
| -11 | -2 ▼ |
| +4 | — |

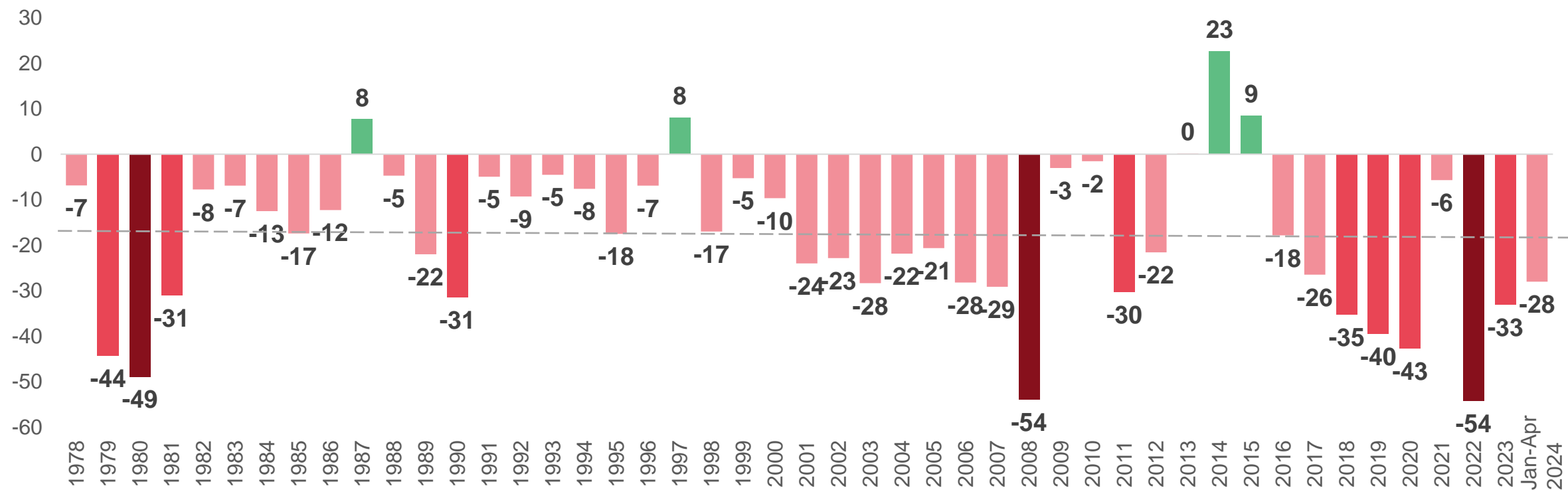
Base: 1,010 British adults 18+, 13 – 21 March 2024

Source: Ipsos Issues Index



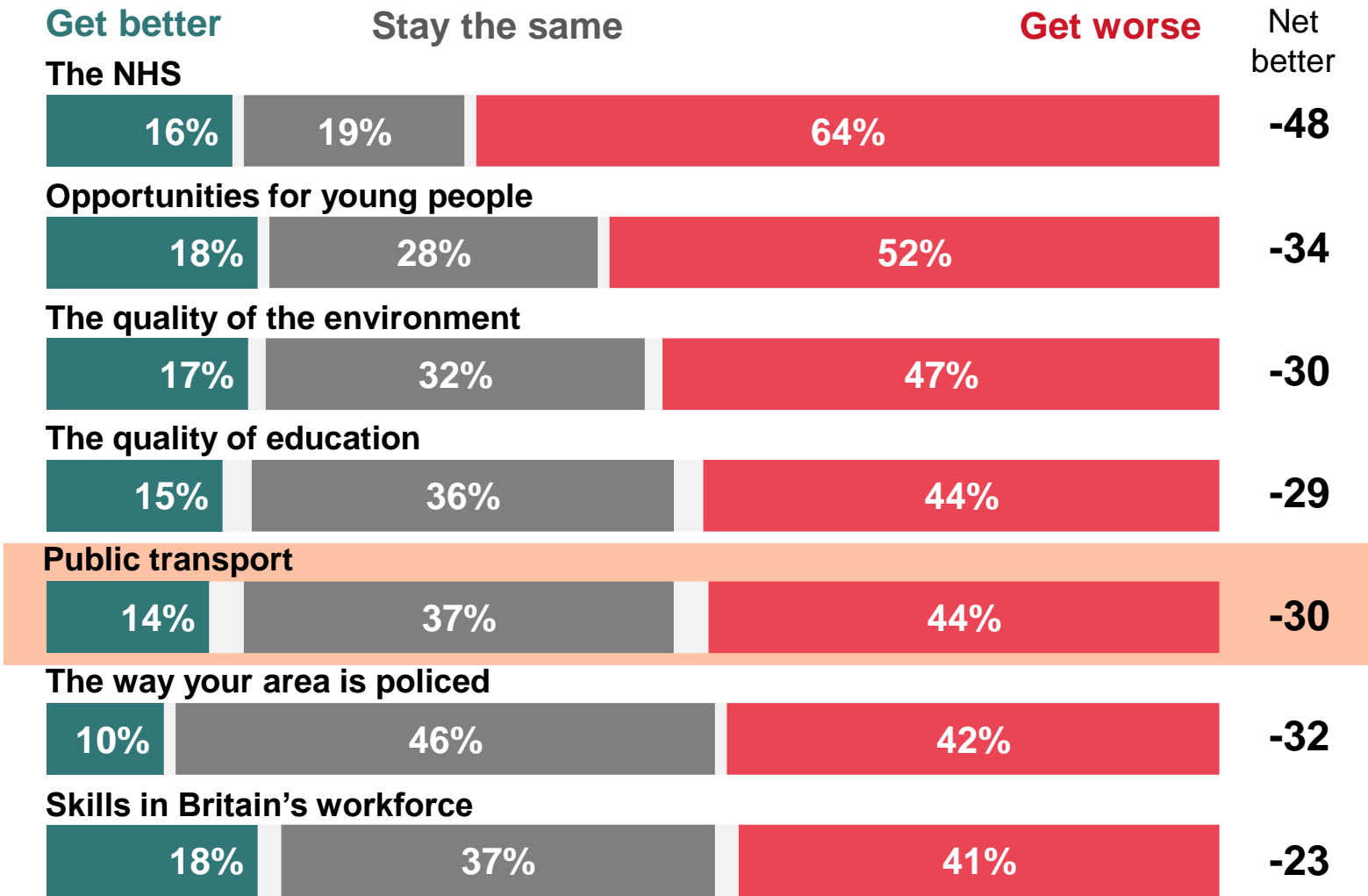
Economic optimism still historically low – though improving since 2022...

Average yearly Ipsos Economic Optimism Index



Pessimism about future of services: especially for the NHS, but worries about public transport also at a 20 year high

Thinking about ... over the next few years do you expect it to?



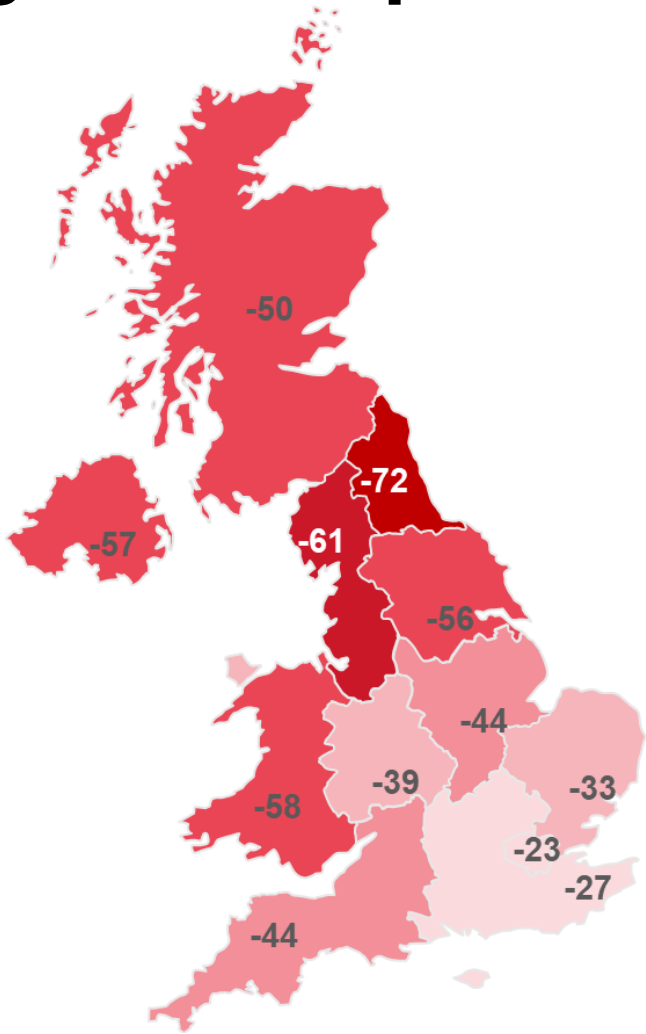
Base: 1,001 British adults 18+, 1-8 November 2023

Source: Ipsos Political Monitor

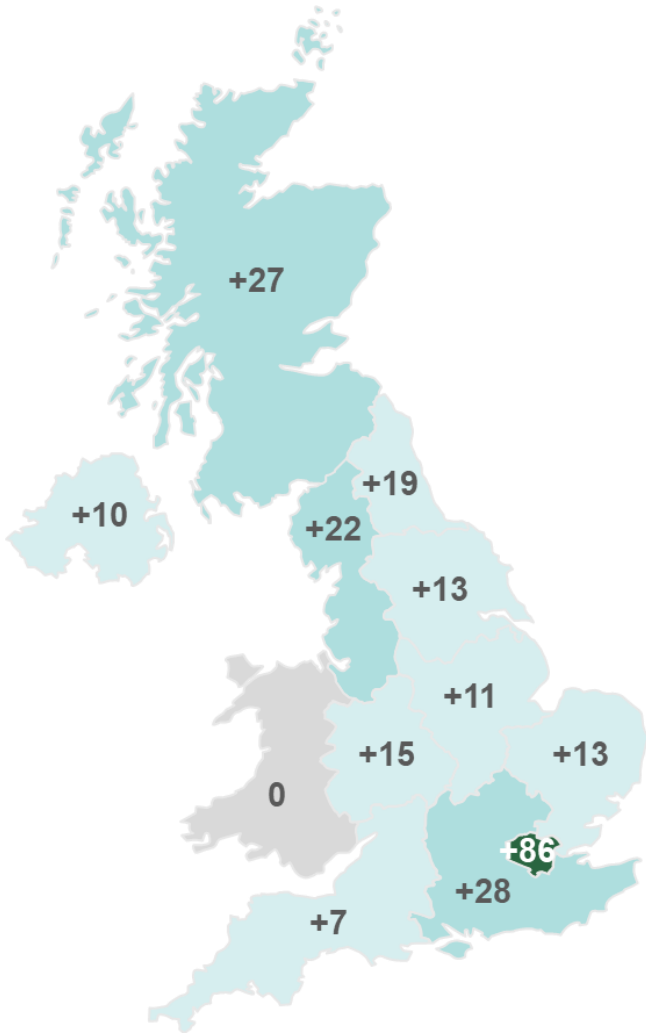


Levelling-up? Perceptions of regional inequalities persist – including on transport.

In your opinion, does the national government in Westminster spend more, spend less or about the same on your area, as it does on other local areas?
% Net Spend less




Public transport:
Ipsos Levelling-up Index scores



Base: All aged 16+ in England (6189); North East (262); North West (661); Yorkshire and the Humber (528); East Midlands (486); West Midlands (541); East of England (618); South East (861); South West (638); London (582); Scotland (510); Northern Ireland (243); Wales (259); Fieldwork dates: 2-8 February 2023

Source: Levelling Up Tracker





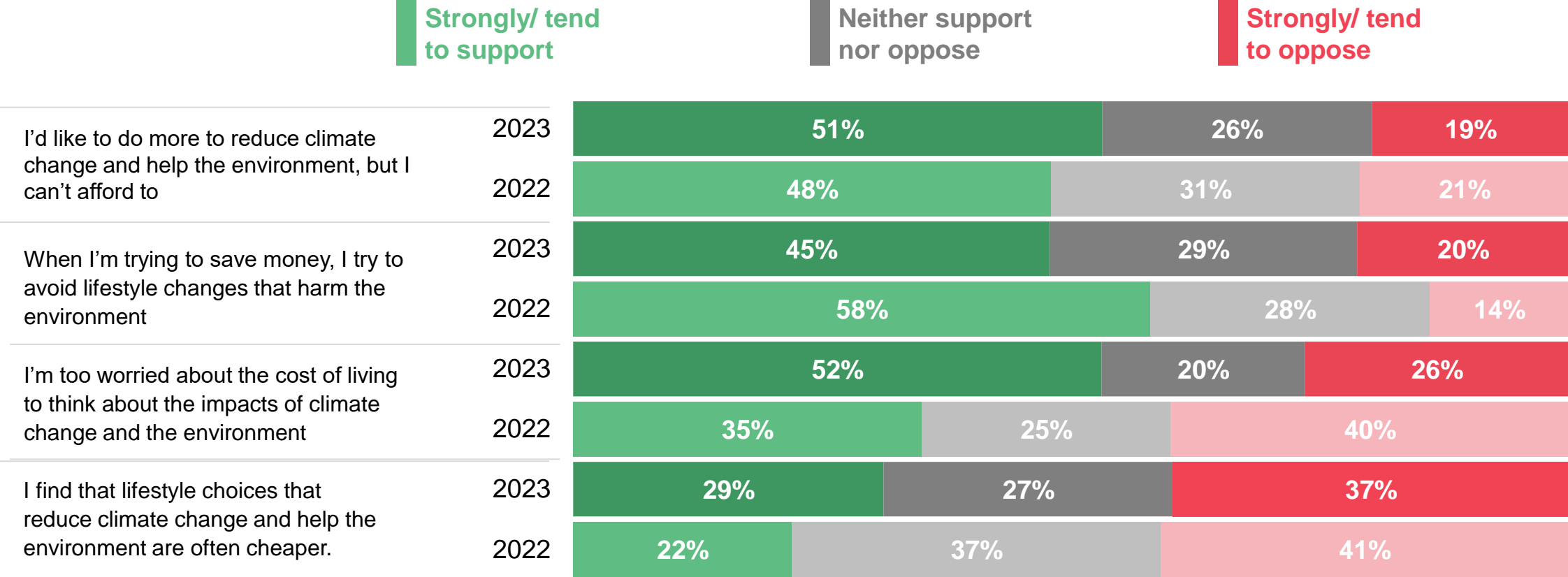
**Three-quarters
(77%) of Britons
are concerned
about climate
change**

**And six in ten
(58%) believe
businesses will be
failing their
employees and
customers if they
don't act now**

Source: Political Monitor July 2023
Base: 1,065 British adults 18+, 19 – 23 July 2023
Ipsos Earth Day 2024

But climate change action is competing against other priorities

To what extent do you agree or disagree with the following statements about your own experiences?



Base: 2023 – 1,089 adults, aged 18-75 in Great Britain (4th – 7th August 2023) / 2022 - 2,050 UK Online adults aged 16-74, 4 – 10 Aug 2023
NB: This is for illustrative purposes – the surveys were conducted using slightly different methodologies



Trade-offs are important

67%

UK adults support frequent flyer levies

49%

support if you personally were not able to take flights abroad very often

41%

support if you personally had to pay more to take a flight

The political state of play

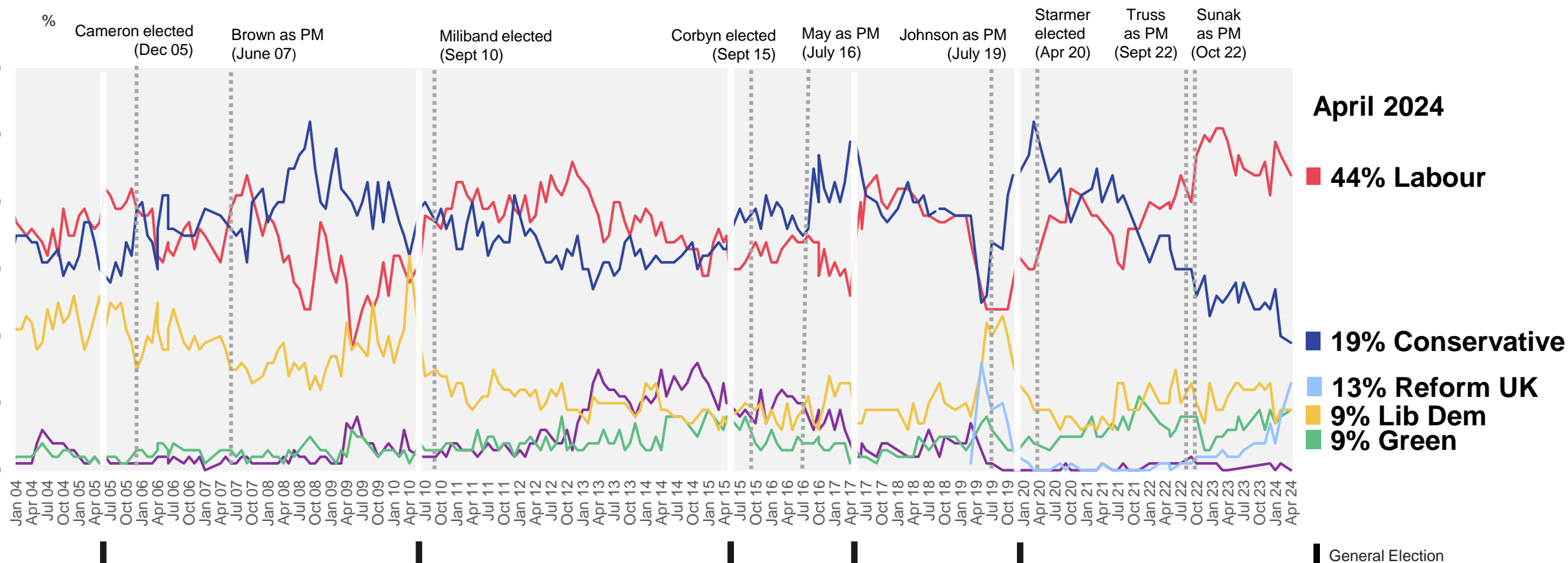
POLLING
STATION

WAY IN

WAY IN

The Conservatives have reached a record low since we started measuring them in the late 1970s

How would you vote if there were an election tomorrow?

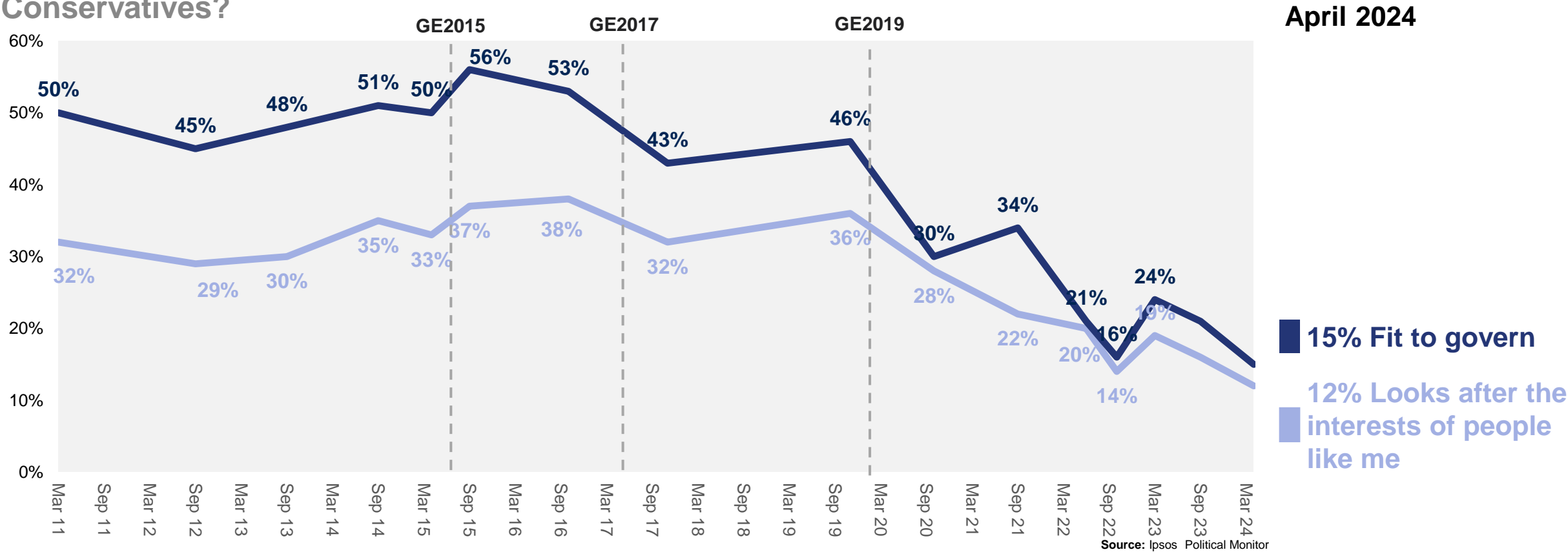


Base: c. 800 British adults; Prior to September 2015 the turnout filter is "All certain to vote"; From July 2015 turnout filter is "all 9/10 certain to vote and always/usually/it depends vote in General Elections."

Source: Ipsos Political Monitor

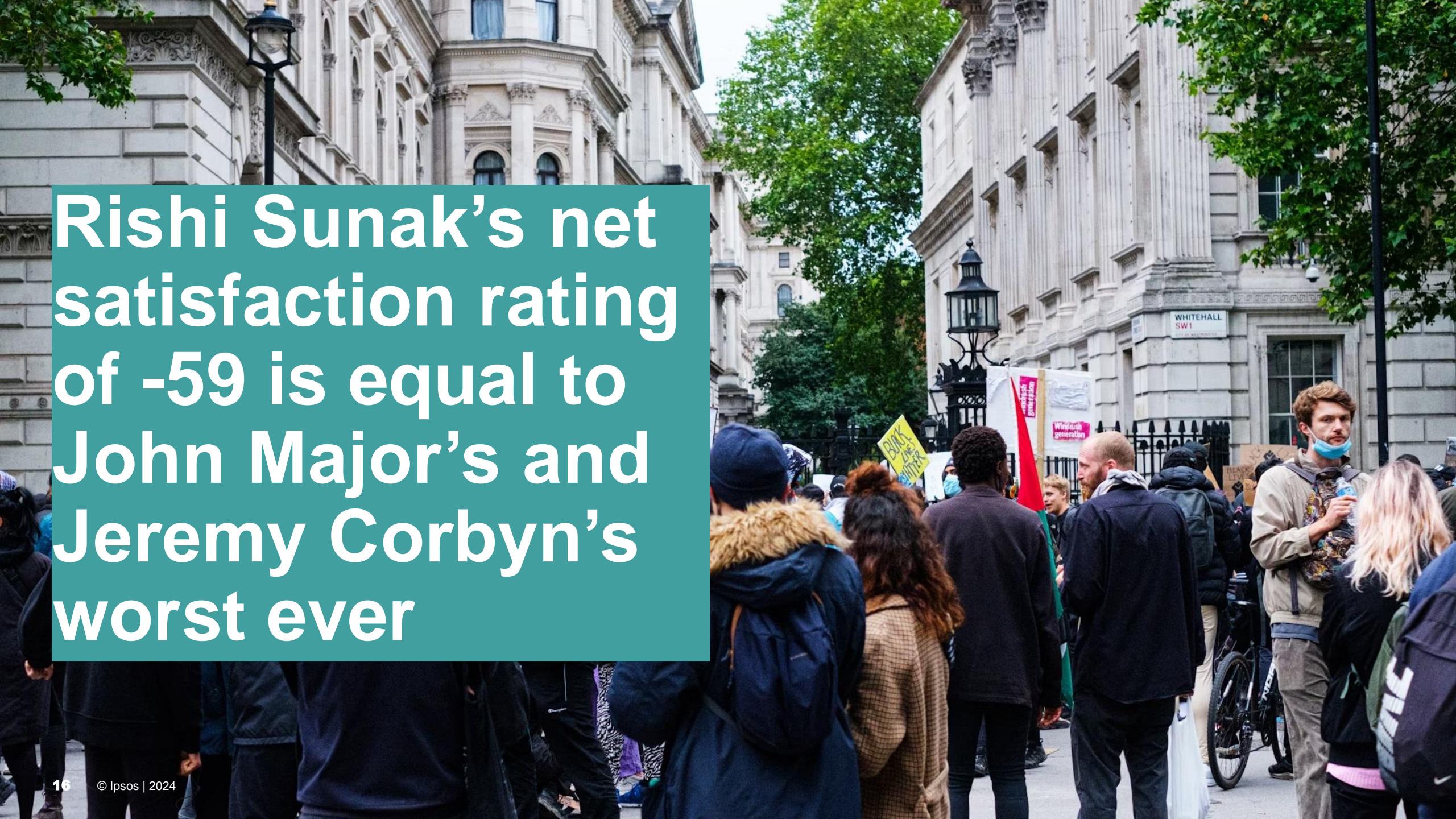
(Along with delivery) the Conservatives' biggest problem is in their brand.....

I am now going to read out some things both favourable and unfavourable that have been said about various political parties. Which of these if any do you think apply to the Conservatives?

























Latest wave base: 1,072 British adults 18+, 3-15 April 2024
c.1000 people asked each wave.

































A photograph of a protest in Whitehall, London. The scene shows a crowd of people, some holding signs, in front of the Whitehall building. A large teal text overlay is on the left side of the image.

Rishi Sunak's net satisfaction rating of -59 is equal to John Major's and Jeremy Corbyn's worst ever

PMs can win elections even if they're seen as out of touch – but they need to be ahead on other qualities

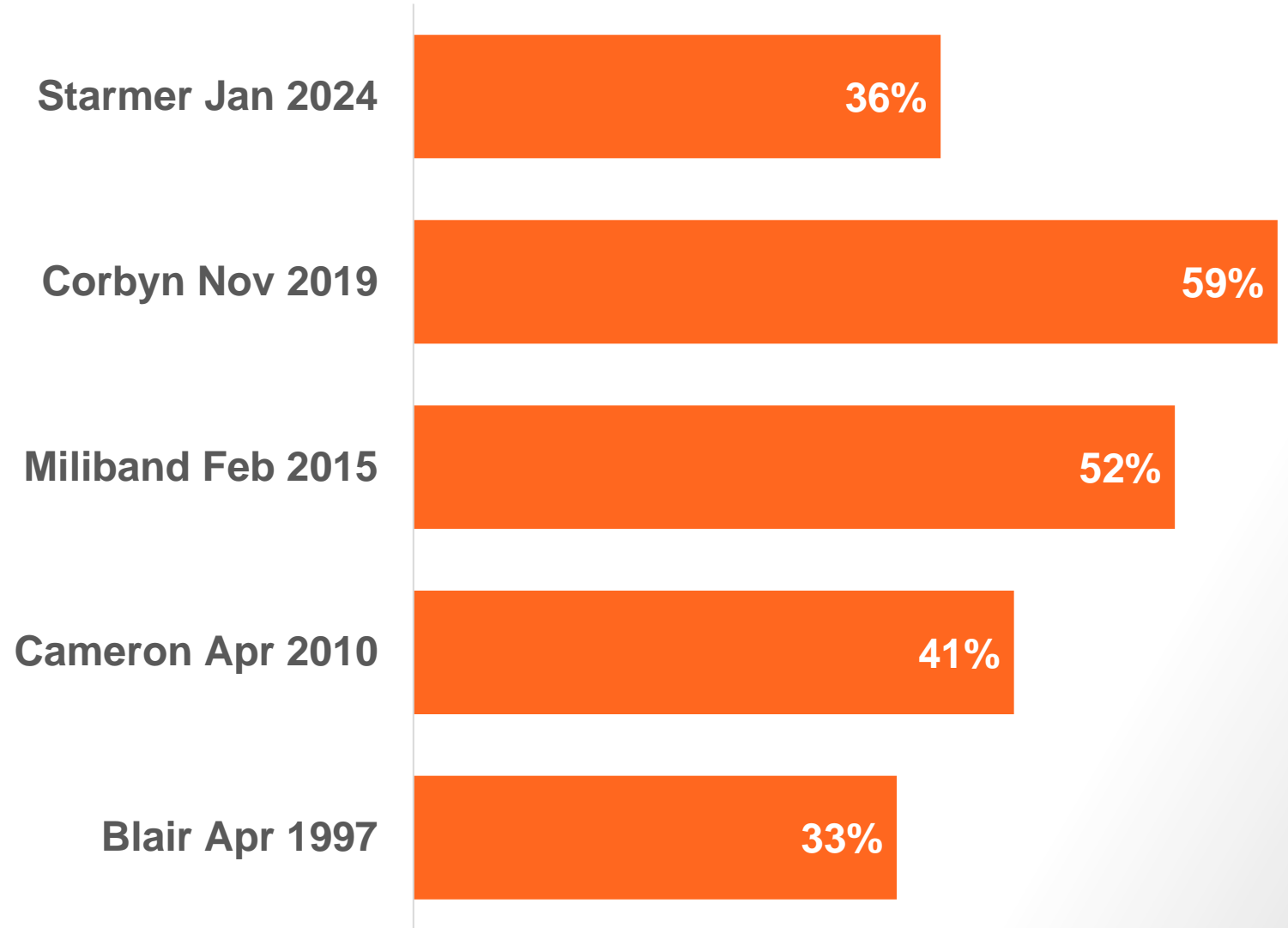
| | Thatcher 1987 | Major 1992 | Blair 2005 | Cameron 2015 | Johnson 2019 | Sunak 2024 |
|---------------------------|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|---------------|
| Capable |  |  |  |  |  | |
| Sound judgement |  |  | = |  |  | |
| Good in a crisis |  |  |  |  |  | |
| Understands GB's problems |  |  |  | = | = | |
| Out of touch |  |  |  |  |  | |

PMs can win elections even if they're seen as out of touch – but they need to be ahead on other qualities

| | Thatcher 1987 | Major 1992 | Blair 2005 | Cameron 2015 | Johnson 2019 | Sunak 2024 |
|---------------------------|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| Capable |  |  |  |  |  |  |
| Sound judgement |  |  |  |  |  |  |
| Good in a crisis |  |  |  |  |  |  |
| Understands GB's problems |  |  |  |  |  |  |
| Out of touch |  |  |  |  |  |  |

Labour aren't scary any more

% who **do not** think the Opposition is ready for Government:



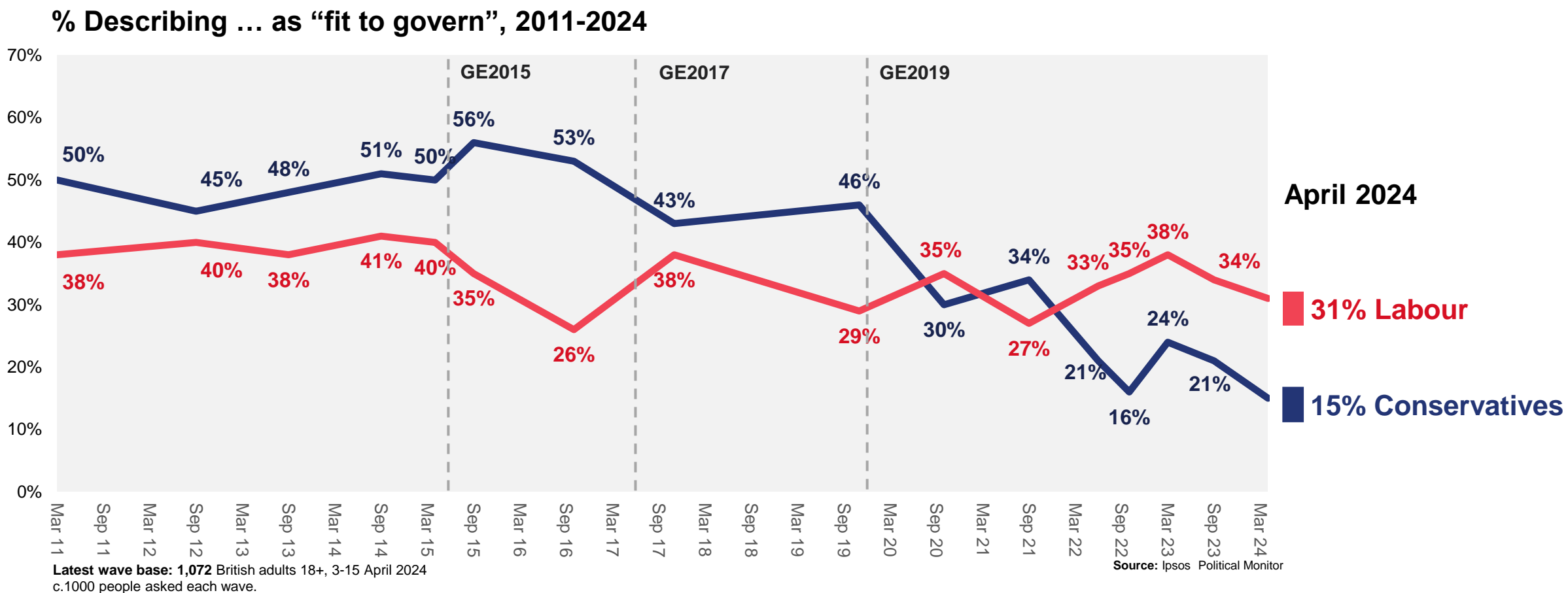


**Keir Starmer is
the first Labour
leader to lead
as most capable
PM since
Gordon Brown**

**But his
personal
ratings are on a
par with Ed
Miliband and
William Hague**

Still some questions on how much of their lead is due to Labour strengths and how much due to Conservative weakness?

I am now going to read out some things both favourable and unfavourable that have been said about various political parties. Which of these if any do you think apply to...? Fit to govern



But time for a change sentiment is strong – will Labour take advantage?

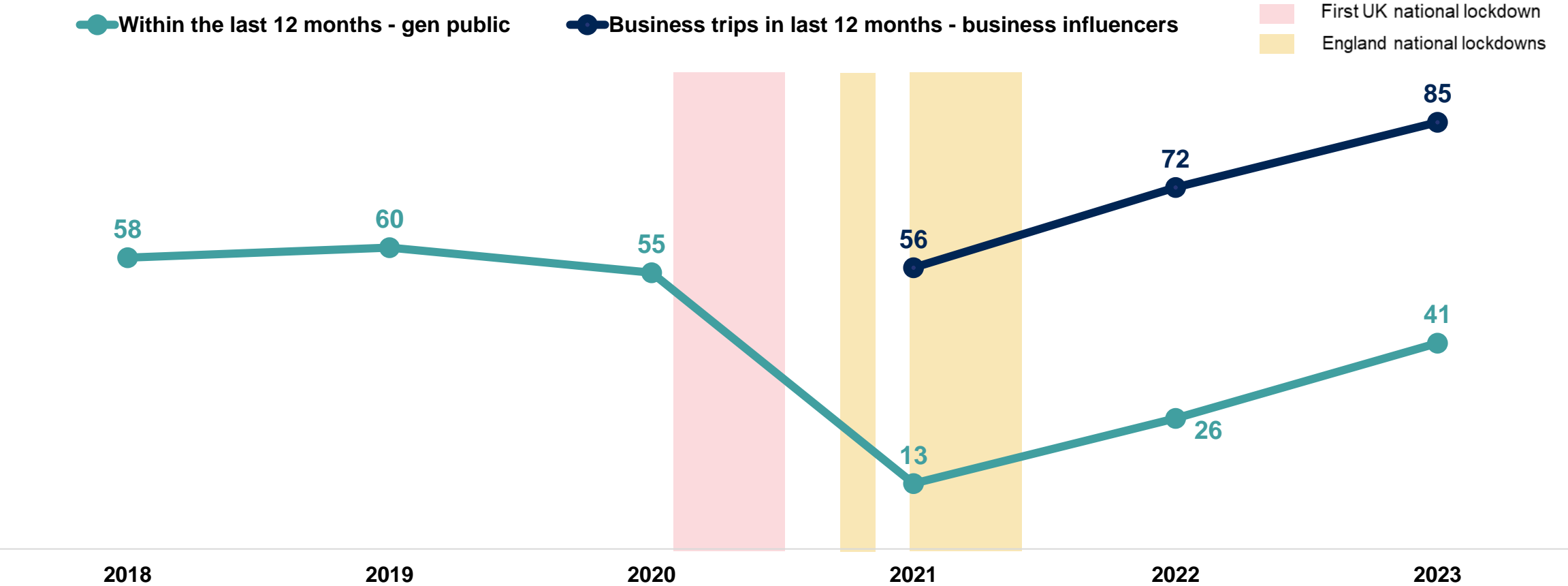
- **77%** think Britain needs a 'fresh team of leaders.'
- Although just **42%** of them are confident Labour can provide this.





What about travel?

Personal travel by commercial airline has bounced back since the pandemic, but remains below pre-pandemic levels

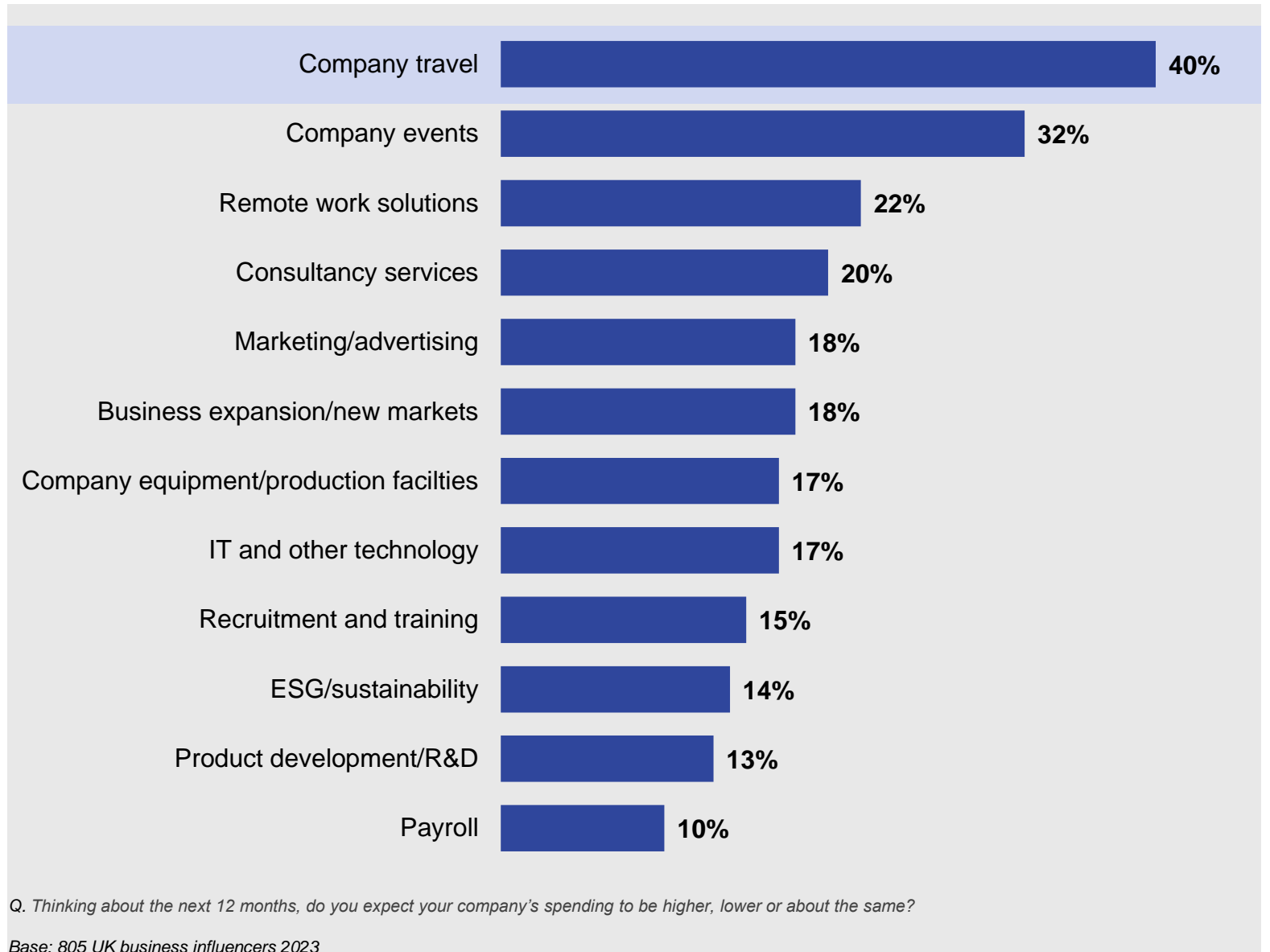


Q1. Firstly, thinking about air travel, when was the last time you personally flew by commercial airline? Please consider all flights, including both domestic and international flights.

48% of business leaders expect to travel **MORE** for business in 2024.

BUT.....

Thinking about the next 12 months, do you expect your company's spending to be higher, lower or about the same? % **Lower**



54%
say
reducing
emissions –
especially via
sustainable fuel – is
the top priority for
the aviation industry

What do people think would be harder to give up – flying or Netflix?

What actions to fight climate change would be the easiest?

Give up streaming services: 12%

Give up flying: 21%



NATS Aviation Index 2023/ Ipsos
Base: All respondents (2023: 1228); Fieldwork dates: 26 - 28 April 2023

What do business leaders want when booking a business trip?

#1

Comfort/quality of service – for both flights and hotels

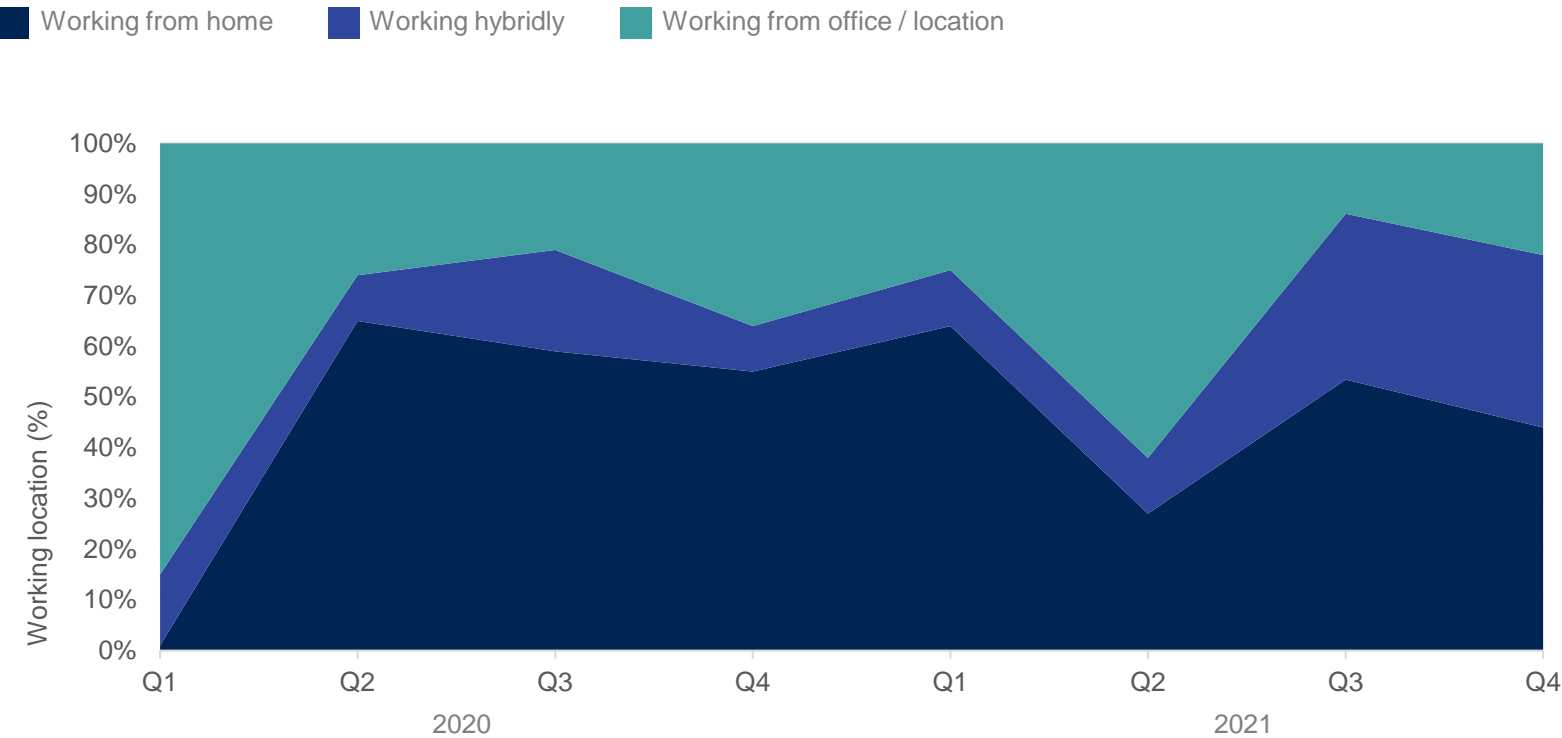
#2

Value for money – for both flights and hotels

The new world of work

Radical shift to where we work

COVID-19 has caused a fundamental shift to ways of working at unprecedented speed



69% business leaders agree travelling to see clients face-to-face is important in building new relationships

76% business leaders agree virtual meetings help me keep in regular contact with my clients

71% business leaders agree it's important to offer people an opportunity for hybrid working

Source: 435,577 responses from employees collected through online surveys on behalf of twelve large organisations in the Financial Services, Manufacturing and Retail sectors
805 British business influencers 2023.

Which brings its own challenges

55% of 18-34 yr old workers

would most prefer hybrid working

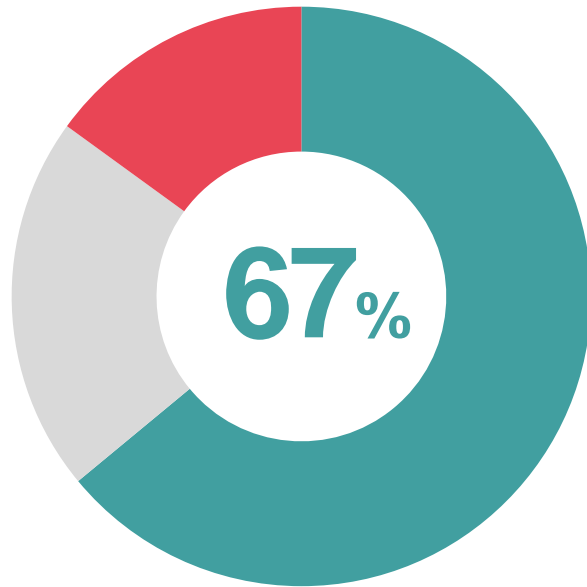
53% of 18-24 yr old workers who work <4 days in the office frequently feel lonely

Base: 1,500 British adults in work, aged 18-65/
656 UK adults aged 18-65 who spend three or fewer days per week at employer's location interviewed between 9th-12th June



Change is a problem for many

The reasons behind changes that take place in your organisation are clearly communicated to employees



Source: Karian and Box UK Employee Experience survey – 5,004 UK workers participated via online survey in May 2022.

What drags down change communications

For neutrals...

1. Silence – a lack of information when needed
2. Over spun, over positive, without reality check
3. A lack of the 'why'

For negatives...

- The previous on steroids for most
- But also a high proportion who simply don't like the message

Source: Trends from focus groups in 2021/22 on behalf of organisations with major change programmes in progress

What people managers want more of from their managers today?

1

Be timely

Share information and provide access to resources in a timely manner (42% and 40%)

2

Give feedback

Provide regular feedback and coaching that supports my development (40%)

3

Recognise

Celebrate my successes (40%)

4

Involve

Involve me in decisions which affect me (40%)

Source: Karian and Box UK Employee Experience survey – 5,004 UK workers participated via online survey in May 2022.

Final thoughts

In conclusion...

1

The public mood is pretty glum.

Labour currently taking advantage of strong time for change sentiment – despite lack of public enthusiasm

2

Business travel recovering – will this continue or plateau?

Need to offer quality, value for money and action on sustainability

3

The world is changing fast – and many need help navigating it

What can you do to empower customers, staff, and society to make the most of it?

THANK YOU! ANY QUESTIONS?

Gideon Skinner

Research Director & Head of Political Research
@GideonSkinner