

Understanding Society

The Power of Opinion

July 2011



The Ipsos Social Research Institute

Understanding people and society worldwide

The Ipsos Social Research Institute is a world leader in understanding citizens, public service users and other key stakeholders in order to help our clients make better, evidence-based decisions.

Our specialist teams in individual countries have the in-depth sector knowledge to assist decision-makers across the full range of public policy issues, and have worked with hundreds of different central government departments, local bodies and public services. And with research operations spanning 67 countries worldwide, Ipsos has a fully integrated global network that delivers multi-country research for the most important international institutions across the world.

Our work covers all types of social research, including policy formulation and testing, citizen and service user satisfaction studies, evaluations of impact, and communications and branding work. It crosses virtually every social policy area, and reflects our expertise across the main issues facing governments and society.

We do not just carry out research; we are committed to sharing the key messages we find as widely as possible. We regularly speak at conferences and in the media and publish thought leadership reports (such as this one) that explore social issues and provide evidence on changing public and stakeholder perceptions across the globe. Through our Research Methods Centre, we also think about how research and analysis needs to adapt in the face of social change.

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Foreword

Welcome to the latest international edition of the Ipsos Social Research Institute's *Understanding Society*.

In this issue, we concentrate on the power of public opinion across the world. We believe that a sophisticated understanding of public opinion should be crucial for anyone with an interest in public affairs, from politicians to public servants, companies to commentators, as well as those who simply want to be educated citizens. This is not just because public opinion can be an important tool to improve policy-making and service provision - which it is - but because it is a powerful force in its own right.

To set all this in context, we are delighted to have an interview with Tony Blair, the Quartet Representative to the Middle East and former British Prime Minister, himself a firm advocate of using high-quality public opinion research to put the citizen at the centre of public life. In a wide-ranging conversation, he discusses the impact of globalisation and how he sees the world changing in the future, and what he has learnt from his continuing high profile work across the globe on governance, faith, and development.

One area where public opinion plays a vital role is on the economy. Since the economic crisis of 2008, public confidence has followed as many different paths as the real economy, and unfortunately it is clear there are many countries which have still not recovered their optimism since those dramatic events. This is not just a point of interest: our analysis suggests that people's

economic confidence is a good predictor of future economic performance, which means that for several major economies - especially in the developed world - there may not be a full recovery for some time to come.

The most dramatic demonstrations of the power of public opinion in recent months have been in the Middle East. The Arab Spring has seen astonishing examples of citizen protest reminiscent of the collapse of communism twenty years ago - sometimes leading to regime change, other times sadly accompanied by violence and conflict. We present an analytical framework for understanding the role of public opinion in regime instability in non-democratic societies, and try to answer the question: if these were democracies, would 2011 be a 'change election' year?

The ex-communist countries in Eastern Europe and Central Asia themselves have been going through a long process of transition since the fall of the Berlin Wall, which highlights that regime change is only the start of a long, hard process. We present the latest results from a very large scale study we carried out for the European Bank for Reconstruction and Development, based on 38,000 interviews in 34 countries from Albania to Uzbekistan. This paints a complex picture of a region hit hard by the global economic crisis, and which still has some uncertainties about the transition to democracy - but nonetheless has much hope for the future.

Public opinion speaks most directly to power through the use of referenda,

and usually these are accompanied by vociferous arguments on both sides. Brazil had a referendum on the public sale of firearms in 2005, and just recently this has re-emerged as an issue in response to a shocking gun attack at a Rio de Janeiro school. We examine the story of the previous campaign and the remarkable turnaround it saw in public opinion on this topic, to see what can be learnt for those involved in other controversial debates.

Public opinion is important because it can drive people's actions, and one of the hottest topics in government circles is the study of behaviour change. This has been popularised through work such as Thaler and Sunstein's *Nudge*, and in our last article, we look at international attitudes towards this - and its opposite on the spectrum, 'shove' - to understand the public acceptability of different measures of government intervention.

We hope you enjoy this update on our latest thinking on public opinion around the world. At the Ipsos Social Research Institute, we remain committed to sharing the messages from our research, in the belief that a better understanding of public opinion will lead to a better world. In the meantime, if you would like to discuss any of the issues raised in this report, or wish to learn more about what we do, please get in touch.

Bobby Duffy
Global Director,
Ipsos Social Research Institute

A crisis of confidence



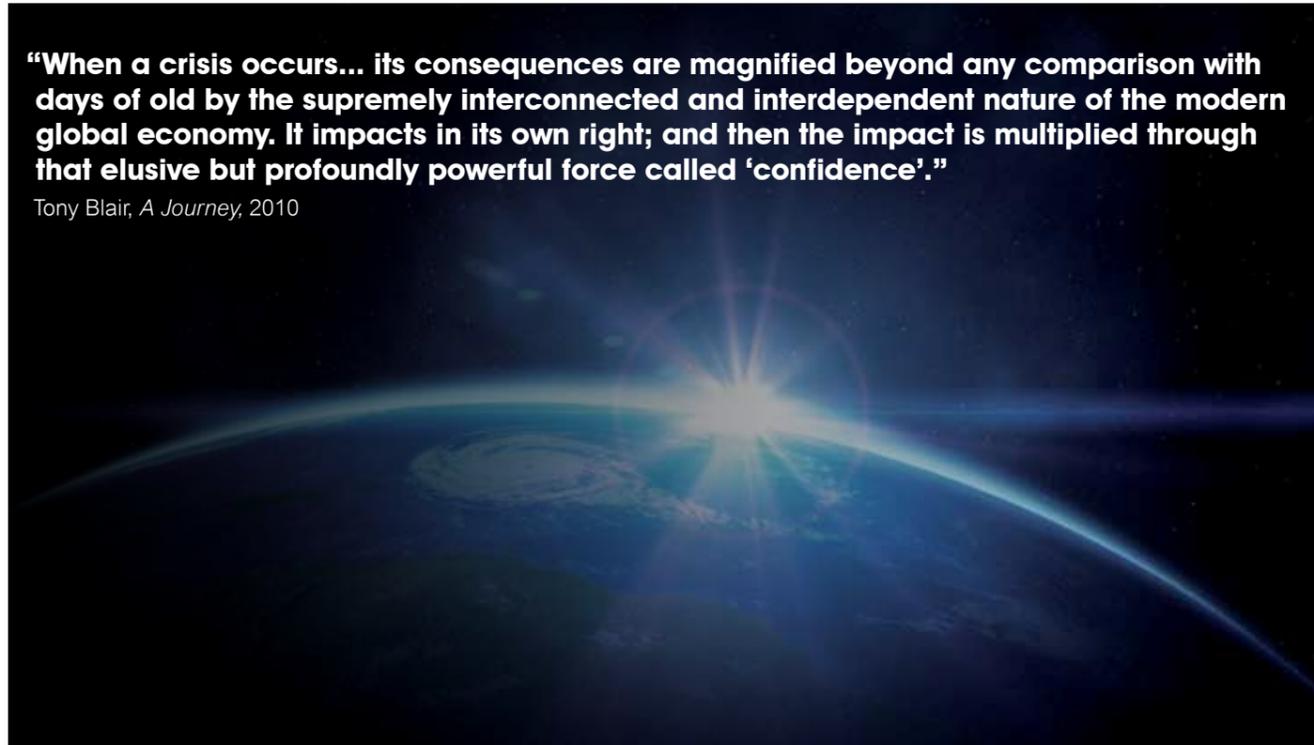
Gideon Skinner
Ipsos MORI, UK



Natalie Lacey
Ipsos MORI, Brussels

“When a crisis occurs... its consequences are magnified beyond any comparison with days of old by the supremely interconnected and interdependent nature of the modern global economy. It impacts in its own right; and then the impact is multiplied through that elusive but profoundly powerful force called ‘confidence’.”

Tony Blair, *A Journey*, 2010



The economic crisis of 2008 has been perhaps globalisation’s greatest challenge, and its impact was felt around the world. But while it is often talked of as a global event, its consequences have been anything but uniform. In line with the broader economic picture, our research from around the world shows that the recovery in public confidence has also been fragmented, with countries taking a wide range of different paths: some experiencing just a small blip before returning to optimism, while others fell into pessimism much deeper, and for much longer.

In its wake, we have seen the re-emergence of a perennial concern in hard times,

unemployment, but public opinion has also had to grapple with topics less familiar to the man on the street: debt, deficit, bailouts. And what makes it harder for politicians and policy-makers to formulate a response to the crisis is that the fractures in public opinion do not just run divides between countries, but within them; people are conflicted and contradictory over what they see as the best route towards recovery. Of course we are dealing with very complex issues here, so perhaps we should not expect the public to have a perfect understanding (and given the amount that has been written on how much economists disagree, it doesn’t seem fair to hold the public up to higher standards). Even so, uncertainty is not the best climate

in which to breed confidence – and public optimism about the economy, as we shall see, should be a key concern for anyone wanting to plan for a recovery.

Data from Ipsos’ Global @dvisor – our online survey in many different countries representing 75% of the world’s GDP – clearly shows the impact of the crisis on public opinion¹. In the year between October 2007 and November 2008, economic confidence among working age adults fell by an average of 26 percentage points in 18 out of the 20 countries it covers, from China to Canada and Australia to Argentina. In fact, in the US, confidence began to fall even earlier, in 2007, mirroring the collapse in subprime mortgages there which was seen

to herald the beginning of the crisis². At the same time, concern about unemployment and jobs rose in 16 countries.

But this is ground that we’ve covered in our reports on public opinion³ in previous years. What is interesting now – and worrying – is the extent to which the path confidence has taken in different countries has diverged since those dramatic events. For the emerging economic powerhouses of China, India and Brazil, the dip in optimism, although real (for China and India at least), seems to have been a blip at most before they returned to their high levels of confidence (although it should be a concern that in the last few months all three have seen falls). And some other major developed economies around the world – such as Germany, Canada, and Australia – have also built recoveries in economic optimism since then.

However, there are many countries that are still locked in a climate of public pessimism about the economy. In western Europe, France, Italy, Spain and the UK are a long way from the happy days before the crisis. Further east, Poland and Russia have seen a steady decline in economic confidence. And nor have the United States, Japan (even before the tsunami), or Mexico been able to significantly recover consumer optimism.

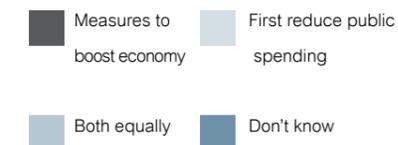
It seems then that the cold winds of economic pessimism are still affecting many of the world’s largest economies. Of the G8 members, only two (Canada and Germany) have seen confidence return, while the other six still languish.

Which road to recovery?

The size of public debt is now receiving almost as much attention as the size of the economy. In its latest Economic Outlook (published in May 2011)⁴, OECD

Europeans are split on the best way forward

Personally, would you say that to emerge from the crisis rapidly EU member states should first reduce their public spending or should they first invest in measures to boost the economy



Base: 26,635 f2f interviews 28.08.2010 - 16.09.2010

Source: Special Eurobarometer 74.1

Secretary-General Angel Gurría said “high public debt levels, which have been shown to have a negative impact on growth, must be stabilised and then reduced as soon as possible, especially if one considers the likely impact of ageing in the next few decades”.

However, despite the argument that the choice between deficit reduction and growth is not a zero-sum game, it is the tension between them that is exercising many in power and amongst the public. Across Europe, there is a clear perception gap between support for firm action on public spending and concern over the impact this might have on people’s day-to-day lives. On the one hand, tough talk plays well. Three-quarters of people across the EU27 countries measured by Eurobarometer agree that “measures to reduce the public deficit and debt in my country cannot be delayed”⁵. A similar proportion are prepared to accept that “we need to reform to benefit future generations even if that means making some sacrifices now”.

However, people seem much less willing to contemplate the full implications of the austerity measures being proposed. So

while most are prepared to accept making “some” sacrifices, this falls to just half who are ready to reduce their living standards now in order to guarantee living standards for future generations. And – not surprisingly given the global focus on unemployment – people also want to see job creation and growth at the heart of any recovery strategy. Despite their strong support for deficit reduction in principle, the European public is exactly split down the middle on whether public deficits should actually be increased to create jobs⁶. Nor can they decide on what should be the first priority for countries to emerge from the crisis – reducing public spending or boosting the economy.

Part of this challenge may arise from the finding that in Europe at least, while unemployment is seen as the key national concern⁷, inflation is the most important personal concern – and of course there are many people not in the workforce whose living standards will be more at risk from inflation and interest rates than whether they have a job or not (for example, those relying on pensions). Balancing the demands of different constituencies is not new for politicians and policy-makers, but this won’t be easy.

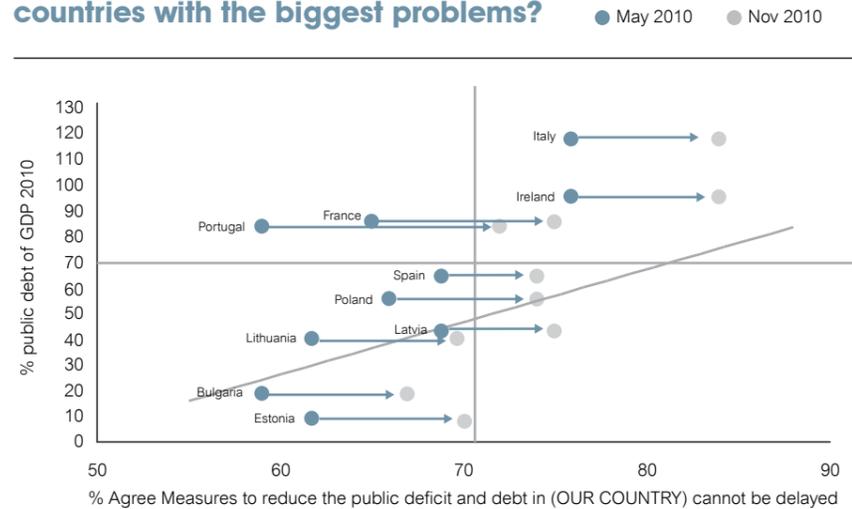
Having said that, there is some evidence of the public changing their views as the full magnitude of the challenges facing public finances becomes clear. Consider the trends seen by Eurobarometer in 2010. Between May and November 2010, the proportion of 'deficit deniers' (those who felt there was no urgency to reduce public deficits) fell significantly, especially in some of the countries with the largest government debt (such as Italy, Ireland, France and Portugal). This suggests that despite deep public unease about the impact of cuts in public spending in some of these countries, there was a growing awareness that something needed to be done.

The link between public opinion and economic performance

It is important though to understand that public opinion is not just a reactive indicator, nor is it only useful for what it tells us about the current state of public expectations. Politicians, policy-makers, businesses and other stakeholders should also pay very close attention to it as a leading indicator of what is likely to happen to the future. Analysis conducted by Ipsos independently and in collaboration with our partners, confirms that public opinion research collecting the attitudes, optimism and pessimism of consumers can really enhance economic data to forecast measures such as consumer spending, consumer credit and GDP.

The value of integrating public attitudes into forecasting models has been recognised by financial institutions and organisations around the world. The OPTIM model used by the Banque de France to forecast the

Is reality having an impact on perceptions in some countries with the biggest problems?



Source: Standard Eurobarometer 74, May and November 2010. Public debt figures are General government gross debt from International Monetary Fund

quarterly growth rate of French GDP and its various components uses quantitative indicators of real activity and data from surveys on households and business leaders⁹. Euroframe, the European Forecasting Research Association for the Macro-Economy, also uses both survey data and financial data⁹.

In Europe at least, while unemployment is seen as the key national concern, inflation is the most important personal concern

Thanks to the breadth and depth of our trend data on consumer confidence, across many different countries, we have been able to explore

these factors and develop models that quantify the link between survey data and financial outcomes (see right for case studies of these). There are challenges; the analysis and inputs are not always obvious or direct (which may partly explain the inconsistency found elsewhere in the literature). Much depends on various factors, such as the questions asked, the metric we are looking to forecast (such as GDP or consumer spending), the relative

balance between personal and country-level assessments, and the time lag applied. Further, the strength of the relationships can often vary by country, suggesting that the concept of a global model may not be a reasonable expectation. But despite all this, while we would not pretend that there is a perfect relationship (and indeed would not expect one), there is a clear link between public opinion and future economic performance.

It is only natural that the behaviour of consumers influences the state of the economy and vice versa. But what our analysis suggests is that measuring public opinion, and specifically people's views about the economy and how to recover from the crisis, can play an important role even beyond its already vital function as a tool to improve policy-making. Public opinion is not just for interest; as Tony Blair says, it is a profoundly powerful force, and can act as a reliable and critical indicator of the state of things to come ■

The link between confidence and future economic performance: three case studies

The US analysis

Since 2002, Ipsos has worked with the Royal Bank of Canada to conduct the RBC U.S. Consumer Outlook Index. This is a monthly national survey of consumers' current and future outlook on the national and local economy, personal finances, savings and confidence to make large investments. These up-to-date and detailed projections provide a rich base of data for a better understanding of consumer sentiment¹⁰.

In addition to our internal analysis, Ipsos has also had the opportunity to work with Natixis. Natixis is the corporate, investment management and financial services arm of Groupe BPCE, the second-largest banking player in France¹¹ and a valued partner to Ipsos in this analytic effort. The analysis being conducted by Natixis involves a sophisticated approach to determine the measures with the most substantive and significant impact on key economic variables.

In particular, we have discovered that the following question is the strongest

predictor of consumer credit: "Thinking of the last six months, have you, someone in your family or someone else you know personally lost their job as a result of economic conditions?". Indeed, this question trumps other measures such as confidence in the national and local economy, as well as confidence in one's personal financial situation. This suggests that uncertainty in the job market is a key driver of consumer willingness to spend.

The Brazil model

Since April 1995, Ipsos has conducted a monthly study in Brazil exploring consumer attitudes toward the economy. The question set includes optimism about the direction of the economy, spending intentions and job security, and is the basis of a Consumer Confidence Index that summarises economic consumer sentiment. This index is used as an official input by the Brazil Central Bank to set interest rates.

Ipsos has carried out a time series model of the Consumer Confidence Index against key financial measures

to determine the relationship between them. We find that there is a significant link between the CCI and disposable income. This is maximised at a lag of six months between the index and the disposable income measure, suggesting that consumer sentiment is a good short-term predictor of disposable income.

UK analysis

In the UK, Ipsos MORI has been measuring economic optimism since 1979 using a single question focused on perceptions of the state of the country's economy in 12 months' time. As we would expect, there is significant volatility in public perceptions as events change, and at first glance there appears to be little correlation between economic confidence amongst the public and actual GDP. However, if we compare economic confidence now with GDP in one year's time, the link is much stronger. For example, we saw the first significant falls in economic optimism amongst the public in winter 2007, before GDP growth went into reverse in 2008.

¹ Ipsos' Global @dvisor is a monthly online survey of citizens aged 16-64 (18-64 in the United States and Canada) in 24 countries (20 are included in this analysis). Between 500-1,000 interviews per country were carried out in Argentina, Australia, Belgium, Brazil, Canada, China, France, Germany, GB, India, Italy, Japan, Mexico, Poland, Russia, South Korea, Spain, Sweden, Turkey and the US.

Minor weights are applied to balance results by age, gender, city, population and education levels according to the most recent country census data. In more developed countries we can be confident that our sample provides a good picture of the population. However, in some developing countries, where a minority of the population has access to the internet, the sample should be seen as representing a more affluent and connected segment of citizens.

² See for example The Global Financial Crisis: Where to next, and what does it mean for OECD countries?, Address by Angel Gurría, OECD Secretary-General, to Victoria University and the New Zealand Institute of International Affairs

³ World Public Opinion: The Gathering Storm, Ipsos March 2009

⁴ http://www.oecd.org/document/38/0,3746,en_21571361_44315115_48021286_1_1_1_1,00.html

⁵ Eurobarometer 74.2, 26,723 face to face interviews across the EU27, 11/11/2010 01/12/2010

⁶ Eurobarometer 74.2

⁷ Eurobarometer 74.2

⁸ OPTIM: a quarterly forecasting tool for French GDP; Banque de France • Quarterly Selection of Articles • No. 13 • Autumn 2008

⁹ <http://www.euroframe.org/>

¹⁰ <http://www.rbc.com/newsroom/rbc-consumer-outlook-index.html>

¹¹ http://www.natixis.com/jcms/c_5022/about-us

Not finished yet

Q&A with Tony Blair



Ashish Prashar
Ipsos MORI, UK



Tony Blair discusses his role since leaving office in 2007. He talks about the future of globalisation, the role of religion and the steps that need to be taken to secure better governance on a global scale.

Ashish Prashar (AP): Our global polling shows that there is a wide variation in citizens' feelings of economic security and attitudes to globalisation. How would you persuade ordinary people that there is still benefit in globalisation instead of a return to protectionism and an insular outlook?

Tony Blair (TB): I am not at all surprised to find that polling reveals a wide variation of feelings about globalisation and economic security. If you work in a huge pharmaceutical factory that relocates, and you lose your job, globalisation is likely to be blamed, and economic security will have gone out the window. If you are in Bangalore and a big call centre or IT firm comes to town, you are likely to feel very differently. Globalisation creates winners and losers. The point is there are many more winners than losers. But, you know, if you have just lost your job, this is not going to be a compelling argument for globalisation.

One way to make the general argument is to say: look at countries that globalisation has passed by, that are unable to participate in global markets because no-one will invest there, where it takes months to shift goods through the port, where corruption creams off any profits from trade. That is, if you are lucky enough to have a port and are not landlocked with bad, or no, tarred roads to get your product to market. Then look at countries like South Korea. Or compare India before and after it abandoned protection of its national industries and removed tariff barriers.

AP: What do you think of the different government responses to the crisis around the world - do you see common themes, best practice, common mistakes or dangers?

TB: Well, the obvious common theme is how to achieve a balance between necessary regulation and the stifling, or curtailing, of entrepreneurship and innovative business practice. The difference between good and bad responses is between those who turn inwards and turn on each other politically, and those who use the crisis to invest in the future. And above all, the rule of law and good governance really matters.

AP: What position do you see the BRIC countries holding in the world economy in the next 20 years? Are these the countries of the future or simply the ones that escaped the worst of the global financial crisis?

TB: The countries of the future will be those which are economically open, invest in innovation, whose public services are capable of meeting the needs of a changing population, which manage and harness diversity – this is challenging for everyone, and, if BRICs get this right, they'll certainly be countries of the future. But so could other places. For example, I think Africa has the potential to be to this century what East Asia was to the last.

AP: If there is a shift in global economic strength to these emerging powers, what impact do you think this will have on society and even public services in the Western/developed world?

TB: The West really hasn't yet absorbed the magnitude of the change that we will experience by the middle of the century as the economic power of the BRIC countries embeds itself and flows of power and wealth begin to change. This is one of the reasons I am so adamant that our youth need to be creative, religiously literate and at ease with cultural diversity.

Our education system must reflect this. And, yes, our public services are already feeling the pinch so we need to continue to find innovative ways to sustain them that do not get bogged down in ideological conflicts about who does what, but are always evidence and results driven.

AP: In your opinion, what countries will surprise us in the next 20 years with their emerging economies? There is much concentration on the rising economies and strength of China, India and Brazil - but where does Africa fit into this?

TB: The surprise would be if the BRIC economies did not move from being emergent to become dominant global economies. They all have the research capacity to move towards post-carbon energy-efficient economies. The worry is will they do so? Because the ecological cost of them pursuing the economic trajectory of US and European industrialisation is unsustainable and would have catastrophic consequences.

Africa's future is a strategic interest for us. The Obama Administration's new Global Development Policy is emphatic on this point. Security, resources, food, water: you name it and we have an interest in how Africa develops. And the good news is that, with the right governance in place, there is enormous potential to be realised here: economic growth in Africa averaged 4.9% from 2000-2008, and with consumer-facing industries, infrastructure, agriculture and natural resources due to add a trillion dollars to Africa's combined GDP over the next decade, this is only the tip of the iceberg.

AP: What needs to change in the development policies of countries

such as the US and Europe (and others such as China) to help Africa achieve its potential?

TB: There's a lot of interest at the moment in development policy around this idea of 'country ownership' – and rightly so. Developing countries want and need to take the lead in their own development.

The good news is that change is afoot. Both in office and since leaving, I am seeing a wave of development leaders willing to break new ground: Raj Shah at USAID, Cathy Ashton and Andris Piebalgs at the EU Commission and Andrew Mitchell at DFID, putting their weight behind this idea of partnership with developing countries, and the development world in general is starting to move on from the traditional donor/recipient relationship. Development policymakers are starting to recognise the need to support genuine country leadership.

That means aligning more of their support behind the priorities that African governments have identified, whether that's health or agriculture or electricity, as well

as helping to support the government machinery that enables African leaders to actually get things done and deliver on their promises to their people.

AP: We were commissioned by the Munk Debates to carry out a survey looking at worldwide attitudes to religion, for the same debate that you had with Christopher Hitchens. It showed that the world was completely split down the middle on whether or not religion is a force for good, albeit with big differences in different regions.

How do you make the case that religion can bring people together in a pluralist world, instead of exacerbating divisions in some countries and holding back development in others?

TB: People of faith can be either a force for good or a force for evil. The polling result, opinion almost equally divided, is telling. It shows how difficult it is to put the good and the bad on the scales and to weigh one against the other.

Religion is a powerful motivating force. The wrong sort of religion can control, manipulate and exploit young minds. The right sort can liberate them and make them free for a lifetime of service.

Religion can of course bring people together. Think of the "Make Poverty History" campaign and the interfaith march for the Millennium Development Goals

The challenges of the 21st century make it imperative that religion does bring people together in shared action and in vibrant local communities

led by the Archbishop of Canterbury. Look at the Common Word discussions initiated by leading Muslims and engaging Christian leaders. Different religious voices in the public square, arguing their case,

should be an important feature of a liberal democracy. But this requires vision and leadership, respect and understanding, from everyone concerned.

The challenges of the 21st century make it imperative that religion does bring people together in shared action and in vibrant local communities. Because one way or another globalisation is going to bring them into ever closer contact. There are powerful forces pushing them into division and enmity. That is why I began my Faith Foundation over three years ago.

We have a Fellowship that pairs young people from different faiths together to lead a global campaign to mobilise the faith communities against malaria. Our work in schools and universities prepares young people to have dreams for themselves that do not involve excluding their fellow students of a different faith. In the long term, there is only one counter to bad religion. And that is good religion.

AP: Our latest global polling shows that climate change is an issue that people are seeing as less significant, which is understandable given the current economic conditions. You recently launched a new scheme in China called Carbon Corporate; can you tell us more about how it will work and how we can keep climate change as a salient issue?

TB: As a nation, China has the opportunity to lead the world in the low carbon economy, but China's cities are where the foundations for green growth will be laid. With an unprecedented urban growth rate, cities are rightly seen as central to China's climate challenge. And that's what China Redesign is all about. The scheme will bring together national and international low-carbon technology suppliers, financial institutions and academic experts to help China's cities develop and implement low carbon growth strategies. Plans that are tailored to each city's specific needs. It's a scheme put together by The Climate Group, a very impressive international NGO, which I've worked with over the past few years.

In terms of keeping climate change as an issue on the agenda, I think we've come a very long way in the past few years. The challenge for governments and NGOs in tough economic times is to help people understand that it's more

than just an environmental issue. The impacts of global warming threaten people's homes, their livelihoods, their food supply and their health. Businesses, transport systems and infrastructure are at risk. The economic consequences of unchecked climate change are likely to be huge. The answer is to talk to people about the economics of climate change whilst taking action to ensure that the global economic recovery is based on low carbon growth.

AP: The countries where the African Governance Initiative is working have seen great progress, but clearly given their history cannot be expected to solve all their issues in a day. What are the first steps you look for as the building blocks for better governance?

TB: Good governance is a lot about leadership and the capacity of leaders to govern effectively. The Africa Governance Initiative works in post-conflict or fragile states - currently Liberia, Sierra Leone and Rwanda - where you've got a leader who's committed to reform. Leaders in this situation have the vision but not necessarily the tools to deliver because conflict has decimated the capacity of the government to get things done. And that's what governance at its most basic is about: delivery of the services and goods that people need.

I know from my time as Prime Minister that delivery is hard work and that you need all the help you can get to make it happen. In Africa it's even tougher. But some of the challenges facing leaders are actually very similar. To deliver reform, you have ruthlessly to prioritize, even when everything appears urgent. You need a good plan for how you're going to get the thing done, and you



need to monitor progress and hold people to account to make sure they are getting the job done. No matter how much money you throw at a problem, if you don't get these basics right, you won't get anything done. So this is where the charity I founded, the Africa Governance Initiative comes in. AGI teams work side by side with African governments to develop the capacity they need to deliver the programmes that people care about.

AP: Better governance is obviously not just confined to Africa - there is a lot of talk in developed countries about making their governance and systems of accountability much more citizen-focused. What do you think are the main areas that need to be reformed in these countries?

TB: The key today is: efficiency, not ideology. Governance is really at the heart of the political debate today. Some people think this debate centres on transparency, or accountability, but in

fact the big discussion now is around about effectiveness and efficiency. 21st century government is less about battles of political ideology, and far more about delivering results for citizens. This applies whether you're in London, Accra or New Delhi. People want a government that can deliver "consumer oriented" public services. They want an empowering state, not a controlling state, which can adapt to change and is open to it.

And effective governance has a read-across to these issues of transparency and accountability encompassed in the more traditional sense of 'governance'. The problem for nations recovering from conflict, for example, is that their people, after years of poor governance, no progress or, worse, regression, lose faith in the political process. But when people see improvements taking place as a result of government decisions, they also see that politics can be about changing lives, not simply changing leaders. They begin to see bad governance not as an inevitable consequence of

an inevitably broken system, but as a brake on their aspirations that is neither inevitable nor acceptable. And they begin to realise their own power to hold their governments accountable and ultimately change the status quo.

AP: Has your perspective on the work and influence of international NGOs changed since you were in office? What makes a really effective NGO that can have an impact on governments and global institutions - what distinguishes the best?

TB: I think it is that creative, risk-taking attitude to development, which partly comes of being able to bypass a lot of the bureaucracy that can hamper governments and the big multilateral agencies, that really distinguishes the work of the best NGOs and foundations. There is some great work going on in the development field at the moment by organisations like the Gates Foundation, George Soros' Open Society Institute and David Sainsbury's Gatsby Foundation.

Foundations like these can act quickly where necessary - and are prepared to think anew - working with the private sector for example, to come up with cutting edge innovations. But they also have the scale to ensure that when they find practical solutions they can really have an impact on solving some difficult development questions.

AP: A thread running through your speeches is the need for leaders to act swiftly. Why do you think this is so important? How does it compare to the other characteristics leaders need in the modern world?

TB: I sometimes say that leadership is a race between expectations and

capability. As a leader, you either reform fast enough to deliver what people expect of you, or you lose the support to lead. It is a huge challenge, particularly when people's expectations outstrip capacity to deliver. It is even more the case for the leaders of countries recently emerged from conflict and where people are living in extreme poverty.

That's why I think having the 'vision' for what you want to achieve isn't enough. Leadership is ultimately about having the courage and determination to take tough decisions and actually get things done.

AP: Your Sports Foundation in the North East of England could perhaps be described as an example of the "Big Society" in practice. What do you think others could learn from this? In particular, how hard (or easy) is it to get people to volunteer to take part in these types of local community activities?

TB: We set up the Foundation over three years ago and now have more children participating in sport across the North East because of the volunteer coaches we have trained and motivated.

The success of the Foundation is not just about us helping with the financial cost of the training, it's much more than that. Lack of support from organisations and lack of help with finding appropriate coaching opportunities are the two biggest reasons given by coaches who stop coaching. We have developed a simple model that is replicable for engaging, training and motivating a wider

range of people to get involved as sports coaches.

The key to our success and perhaps what others could learn from us is that we start to build a relationship with our members from the minute they decide to get involved.

Leadership is a race between expectations and capability. As a leader, you either reform fast enough to deliver what people expect of you, or you lose the support to lead.

We never forget that our members are volunteers - people who are willing to give that bit extra to help others and we make sure that from the start they are given full support.

We organise the right training courses, help with the application and CRB processes, meet with and agree a partnership plan with the organisation they will volunteer with, hold member networking and further training events and involve all members in the organising and running of TBSF sports competitions.

All of this together makes it much easier for volunteers to agree to get involved and more importantly to stay involved.

AP: What would you like your legacy to be?

TB: I always think that's a slightly odd question to answer, partly because it's a question you ask of someone at the end of their career and I'm certainly not there yet. But I guess I want people to know that I've always stepped up to the challenges I've been confronted with, all throughout my life. And all along the way, I have and I continue to work hard to keep on trying to make a difference. But I'm not finished yet ■



Biography

Rt Hon Tony Blair served as British Prime Minister for ten years between 1997 and 2007. During a decade in office, he was at the centre of domestic and international politics. His experience in Northern Ireland, Kosovo, Iraq and Afghanistan highlighted the growing importance of faith in this globalised world. As faith motivates billions of people around the world, understanding its trends and its impact can be as important as understanding a nation's GDP, its business and resources.

Mr Blair started his own spiritual journey whilst a student at Oxford in the 1970s. Throughout his life he has witnessed the positive contributions of faith communities through efforts such as the provision of healthcare, education and aid in developing countries; and the Jubilee Debt campaign, the great mass movement which did invaluable work to help the poor of the world. But he has also seen the negative ways that faith can motivate people.

In order to provide a positive alternative to those who use faith as a means to divide, Tony Blair established the Tony Blair Faith Foundation immediately after leaving office. The role of the Tony Blair Faith Foundation is to help harness the power of religion in a positive way and to promote peaceful co-existence between people of different faiths. Mr Blair believes interfaith action can help to address the challenges globalisation brings and that good relations between different faiths are key to tackling prejudice, misunderstanding and extremism.

There are three main projects run by the Tony Blair Faith Foundation; The Faith and Globalisation Initiative, Face to Faith and Faiths Act.

The Faith and Globalisation Initiative was established in September 2008 and is a global network of universities which undertakes academic teaching and research to help emerging leaders, decision-makers, opinion-formers and the wider public analyse the

impact of religion on the modern world. Mr Blair was appointed honorary Fellow at Yale University where the first ever course on Faith and Globalisation was established, and taught its course for three years. The course has since been taken up by seven other universities in five continents across the world.

Mr Blair's commitment to education in office has continued since. The Foundation's global schools programme, Face to Faith, is now active in 16 countries across the world. The programme uses modern technology to enhance dialogue and understanding between young people of different faiths and cultures.

He also supports multi-faith young leaders. The Tony Blair Faith Foundation's 30 Faiths Act Fellows spearhead a global health campaign to mobilise different religious communities to help achieve the Millennium Development Goals.

A year for change

Public opinion and the Arab Spring¹



Clifford Young
Ipsos, USA



Julia Clark
Ipsos, USA



The recent events in the Middle East are impressive in their scope and direction. Who would have thought just a few short months ago that the Ben Ali government in Tunisia and the Mubarak regime in Egypt would have been brought down by popular pressure, or that popular protest against the current regimes in places like Yemen, Iran, Bahrain, Libya, Jordan, Syria and Lebanon would have even occurred. These events prompt the natural question: what explains all of this?

Many arguments abound. Some focus on the importance of social media and the power of the internet to mobilise people and share information. Often this viewpoint links the organisational capacity of the internet with an emergent, borderless, tech savvy, globally-oriented youth – who have more in common with each other than with the places they reside. Related to this is a more general argument that with globalisation and increasing access to information, “closed regimes” will find it harder to maintain legitimacy.

Other arguments focus primarily on economic factors as the cause, such as the sharp increase in food prices and other basic necessities of life, precipitating popular unrest. Finally, others stress the ineptitude of the regimes to meet basic human needs and the corresponding lack of credibility reinforced by their corrupt nature. All these perspectives have merit.

However, missing from all these explanations is the importance of public

opinion in shaping events. Yes, they all include popular unrest as a factor; though never as the central driver of change.

Indeed, while it is elementary to consider public opinion's impact on regime stability in democratic societies (e.g., whether a government or opposition candidate will win the election), the same cannot be said in non-

democratic societies, where public opinion is often left out of the equation completely or treated as an irrational social spasm brought on by extreme angst.

In contrast, the empirical evidence shows that events in the Middle East are, in large part, a function of widespread citizen pessimism about the future, precipitated by the global economic downturn. In practical terms, if given a chance at the polls, people across the region would ‘throw the bums out’ in their vote. In pollster parlance, this would be a ‘change election’ year – if there were elections.

Regime change in democratic societies: change versus continuity

From an analytical perspective, understanding and predicting regime change in democratic societies is an easier task than in non-democratic societies for several reasons. Democratic societies have institutionally defined mechanisms – periodic elections – for the transfer of power, together with relatively open systems that allow for the free flow of information and for a competitive marketplace of ideas and choices.

Such open systems, ultimately, ensure that those who govern need to converge with the broader demands of the governed.

In practical terms, if given a chance at the polls, people across the region would ‘throw the bums out’ in their vote. In pollster parlance, this would be a ‘change election’ year – if there were elections.

Put another way, political parties and politicians are “vote maximisers” who will try to approximate in their policy mix what the average, or median, voter wants².

Central to this model is public opinion as a driving factor in electoral outcomes. “Popular will” decides who will and will not govern. And when it comes to elections, voter calculus is often quite simple and can be reduced to a near-dichotomous choice: do I want change or continuity? Am I feeling good or bad about my condition in the present and near-term?

Understanding this voter calculus allows us to classify elections and ultimately to forecast probable outcomes based on a “change or continuity” election typology.

Change elections are those where voters want to “throw the bums out”. In these situations, government approval ratings, “right track” numbers, and consumer confidence are in the tank –

either because of a bad economy, some political scandal, or a catastrophic event. Change elections favor the opposition (or the challenger) over the government (party-in-power) candidate. Obama's victory over McCain in 2008, or Tony Blair's win in 1997 are classic examples of change elections. In contrast, “continuity elections” are those where voters want “more of the same”. Why? The reasons vary, but typically, the economy is humming along, and serious political scandals and foreign policy quagmires have been avoided. The government candidate is normally favoured in such scenarios. For instance, Clinton in 1996 and Brazil's Lula in 2006 are perfect examples of continuity elections.

In all, based on our own study of hundreds of elections around the world, about 80% of all elections can be classified by the simple change-continuity dichotomy. Of these, approximately 90% of all continuity (government) candidates win in continuity scenarios, while about 80% of all change candidates (opposition candidates) win in change scenarios³.

Middling elections, in contrast, are those that cannot be clearly defined as change or continuity, with optimism measures typically lukewarm. Such elections represent the remaining 20 percent of

Examples of elections by the change-continuity typology

Change Elections	Middling Elections	Continuity Elections
Cameron 2010 (UK)	Pinera 2010 (Chile)	Jonathan 2011 (Nigeria)
Obama 2008 (USA)	Blair 2005 (UK)	Humala 2011 (Peru)
Sarkozy 2007 (France)	Bush 2004 (USA)	Dilma 2010 (Brazil)
Morales 2005 (Bolivia)		Santos 2010 (Colombia)
Lula 2002 (Brazil)		Kichner 2006 (Argentina)
Blair 1997 (UK)		Lula 2006 (Brazil)
		Blair 2001 (UK)
		Mitterand 1988 (France)
		Clinton 1996 (USA)

all elections. Here, factors such as power of personality, the effectiveness of the campaign, or the inherent advantages of incumbency often play a greater role.

“Desire for change”, in turn, can be measured in a number of ways, including government approval ratings, right track numbers, economic optimism questions or consumer confidence indices, among others. At its core though, “desire for change” metrics capture people’s relative degree of optimism about the present and near-term.

As a rule of thumb, when such indicators fall below the high 30s, this is a strong signal that voters want change and will vote for the opposition candidate. In contrast, when the same indicators are in the mid 50s and above, this strongly suggests that people want more of the same and will vote for the government candidate. Elections with optimism levels in the mid 40s are more complex and depend on aforementioned factors, like incumbency and power of personality to determine the ultimate outcome.

This exercise leads us to a question: is this a “change year” in the Middle East? That is, is the “desire for change” high enough among citizens in the Middle East that if

there were elections today, the present regimes would be voted out?

Regime stability in the Middle East: a year for change?

The short answer is yes. If elections were held today, the vast majority of governments would be voted out of office. Citizens in the region want change, with optimism numbers hovering in the mid-30s in most countries. The chart below uses number of deaths in protests as a proxy for the number of protests a country has seen; there is a clear correlation between economic optimism and protests in these countries. Indeed, those countries with the most protests have also been the ones to see regime change (points in grey).

Optimism numbers are lowest in those countries which have already had regime change and/or are having open protests including Egypt, Algeria, Bahrain, Jordan, and Tunisia. In contrast, countries with higher levels of optimism have not experienced open protest and civil unrest (e.g. Saudi Arabia, UAE, Kuwait).

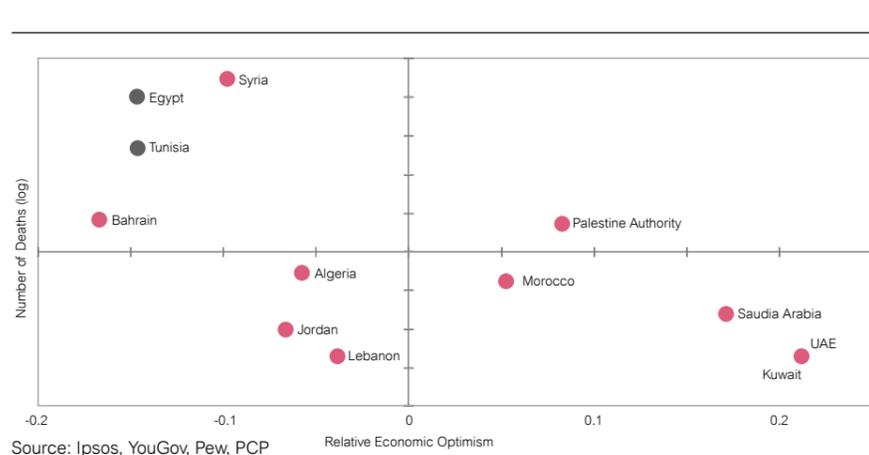
Some might say that optimism levels in these countries have always been low due to the

very nature of the authoritarian regimes. According to this perspective, the present unrest is a function of other factors, such as regional media and the rise of the internet and social media. The data, however, do not bear this out; indeed, optimism levels in many of these countries were actually quite high only a few short years ago, before dropping quite precipitously in the run-up to the current unrest.

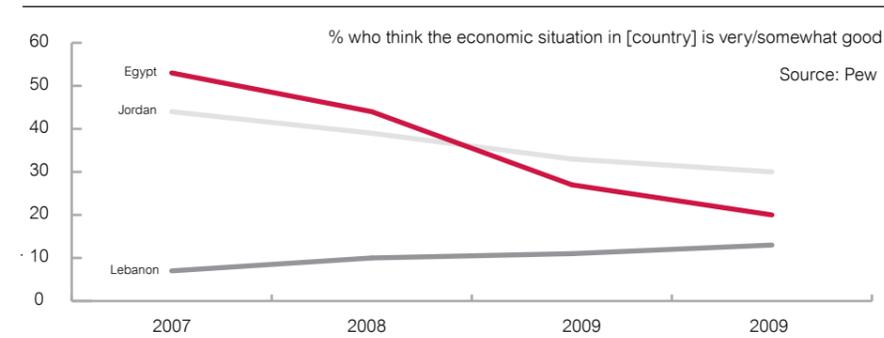
This suggests three important points. First, the global economic downturn, which has precipitated regime change in democratic countries, is now manifesting itself in the Middle East through citizen angst. Second, we should not forget basic human nature: even in non-democratic societies, if people can put food on the table and send their kids to school, regime change will probably be low on their list of priorities; when they cannot, it probably goes to the top. And third, sharp drops in optimism might actually be a key trigger for willingness of a population to protest openly.

Quantitatively then, the data suggest that 2011 is a “change” year in the Middle East. Consequently, most regimes would probably not survive if “popular will” were left unfettered.

Economic optimism and protests



Economic situation in non-democratic states



suggest that public opinion is the only factor in understanding events unfolding in the Middle East and Northern Africa. Indeed, several caveats are in order:

First, given the non-democratic nature of most regimes in the Middle East, public opinion is not the only factor in understanding regime stability in the region. Key here is to understand that a country’s “willingness to use force and coercion” also plays an important role in determining regime stability. As we write this, the Qaddafi and the Syrian governments are killing their own citizens who disagree with them. This is a clear case where a regime has a high propensity to use force. More clearly defined analytical variables will shed light on both past and future regime actions.

And second, unlike democratic societies with their nicely defined institutional rules for the transfer of power, there is no clearly defined road map once a non-democratic regime falls. Here the analytical point is that there is no certainty of regime type after regime change in non-democratic societies. Indeed, the new regime could take on any number of personalities and institutional forms – some good and some bad by Western standards. Any framework, therefore, needs to account analytically for “ease of transition” in order to reduce uncertainty for policy makers.

Such factors, in turn, may vary from country to country, but credible institutions that can bridge the gap between the fall of the old regime and the rise of the new one (e.g. the Egyptian military or governments with

the institutional “know-how” to meet the demands of the people) are one important factor. Not all countries, though, have such institutions, and only analytical models will shed light on the variety of possible paths.

Towards an analytical framework

In all, we believe that any analytical framework which has as its objective both the prediction of regime outcomes as well as the identification of possible engagement strategies for policy makers should include all these variables: desire for change, regime willingness to use force, and ease of transition. Critically, at this point in time, our approach can help policy makers separate what is real (the true “brush fire”) from noise (the false positives).

Many countries, indeed, have already experienced open protests by frustrated citizens but not all are prime candidates for collapse. Some have relatively high levels of optimism which buffer them from citizen backlash, while other countries are more likely to use force and coercion, which make the success and sustainability of protests more uncertain. Furthermore, as stressed, regime type is far from clear after a regime has collapsed, which is why our approach considers factors such as the credibility of local institutions and support for democratic regimes. Perhaps here the analytical model is murkier, and at this stage, requires more data and inputs. Fundamentally, though, our analysis demonstrates the power of public opinion in shaping events, and even changing history ■

Regime stability variables

Analytical variables	Data inputs
Desire for change	Public opinion
Regime willingness to use force	Political-institutional
Ease of transition	Public opinion & political-institutional

¹ This article is an abridged version of a longer paper entitled “Throw the bums out: Public opinion as a proximate cause for regime instability in the Middle East” by Clifford Young (Ipsos), Julia Clark (Ipsos), Chris Garman (Eurasia Group), and Jason Kemp (Booz Allen Hamilton)
² See Downs (1957) An economic theory of democracy and Black, Duncan (1948). “On the rationale of group decision-making”. Journal of Political Economy 56: 23–34 for a further discussion of candidates as vote maximizing actors and voters as interest maximizes
³ See Young and Garman (2010) “The unpredictability of pundits and predictable elections: Using public opinion to predict political disputes” Annual WAPOR Conference, Chicago, Illinois

Life in transition: After the crisis



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The “golden decade” of sustained growth with improving living standards helped over 55 million people escape poverty in Central and Eastern Europe and Central Asia between 1999 and 2008. But this transition region – more prosperous, more democratic and by 2008 better integrated into the global economy – was among the hardest hit by the economic crisis. *Life in transition: After the crisis*¹ provides a comprehensive insight into how people’s attitudes, beliefs and values have been affected by the crisis and its aftermath. It confirms the resilience of the transition region, but acts as an important reminder that transition itself is a work in progress.

The world has become a new and different place in the last two decades. The collapse of communism, something unimaginable as late as 1985, has forever changed the global political and economic landscape. However, with the collapse of one societal system there started a long process of transition towards democracy and market economy for nearly half a billion people.

The transformation of the transition region in terms of GDP, employment and investment can be measured and expressed in “hard” figures. However, what the GDP growth and trade deficit balance do not show is the story of men and women who live in these countries, work in these jobs and create this income. To help measure the impact on people and the extent to which democratic and market economy values had taken root, the European Bank for Reconstruction and

Development (EBRD) and the World Bank conducted their first *Life in transition survey* (LiTS) in 2006 across 28 countries of the EBRD’s operations. Despite the cumulative economic growth of 40% across the region between 2000-06², the first survey showed that many people found transition to have hit them hard. Low levels

of life satisfaction and moderate support for democracy and the market economy were likely linked to an unfinished reform agenda, especially with regard to improving the quality of public services, tackling distrust in institutions and in fighting corruption. However, this was tempered by a strong sense of optimism for the future: many thought that the sacrifices they had made were worthwhile and that their children would enjoy a better future.

The Ipsos Social Research Institute was commissioned to work with the EBRD and the World Bank on the follow-up study, conducted in late 2010. The economic backdrop compared to 2006 was grim. Growth across the region stood at -5.2% in 2009, with more severe contractions in a number of countries (-18% in Latvia, for example), and often only patchy growth in 2010. The report *Life in transition: After the crisis* (LiTS II) reveals the manifold ways in which people have been affected by the downturn, the impact it has had on their day-to-day lives, and,

importantly, the ways in which it has affected their attitudes towards democracy and the market economy.

Many thought that the sacrifices they had made were worthwhile and that their children would enjoy a better future.

LiTS II is one of the most authoritative surveys ever undertaken across the region. With the inclusion of five Western European ‘comparator’ countries, almost 39,000 hour-long face-to-face interviews were conducted, using random sampling. Intensive pre-piloting strengthened the questionnaire, and a longitudinal element will be introduced in late 2011.

The results of LiTS II reveal a complex picture. Not surprisingly, some people are less positive towards markets and democracy – a system which from their perspective, must share the blame for the crisis. Yet, there have also been positive shifts in people’s attitudes towards key institutions that form the fabric of an open democratic society. LiTS II demonstrates that the process of transition is still a work in progress, and, that the end point is not yet clear for all countries in the region, with numerous obstacles remaining.

The transition region felt the full force of the economic crisis; two-thirds reported that it had affected them personally. In particular, many have suffered salary cuts (30%) and job losses (17%), which meant that households have had to employ a number of mechanisms to cope with the decline in their material well-being. While people in the West have also been affected by the crisis, this has primarily meant that they have had to cut down on luxury goods. In the transition region, by contrast, many people have had to reduce consumption of staple food and health expenditure.

Considering the impact of the financial crisis on people’s material well-being,

LITS II - Fieldwork in 34 Countries



a host of important questions arise. For example, to what extent has it impacted upon people's overall life satisfaction? Do they find it easy to overcome the consequences of the crisis? And, perhaps most importantly, has it undermined people's faith in and commitment to democracy and the market economy?

We know that life satisfaction is a complex measure, which is influenced by many factors. However, LiTS II shows that those affected by the crisis report lower levels of life satisfaction, and that the greater the severity of the impact, the lower the satisfaction with their life. It is important, nonetheless, not to over-simplify: in the transition region, levels of life satisfaction are at their highest in Tajikistan, despite the fact that it is also the poorest country in the region!

In general, higher levels of life satisfaction

are associated with employment, higher education and good health, as well as income and economic growth. For policy makers, this indicates the importance of continuing to improve key public services which help ensure people have access to a higher standard of living.

While we can see that the crisis has had a negative impact on people's standard of living, it is encouraging that people are generally optimistic about the prospects for the future: around half feel optimistic that children born now will have a better life than their generation, which is much higher than in the five western European countries, where over 70% feel that the next generation will in fact fare worse.

As mentioned, LiTS I revealed that most countries viewed democracy and a market economy favourably – a result which must be framed in the context of a sustained

period of growth. So, given the negative changes to the economic environment, how have people's levels of support for market economics and democracy changed?

In both LiTS surveys, people were asked about their political and economic system preferences. They had to choose which statement, shown in the table overleaf right, they agreed with the most.

Considered in the context of the crisis, the responses are broadly encouraging: support for democracy remains relatively strong in many countries – almost 45% choose democracy as their preferred system over any other political system. Unequivocal support for market economies is slightly lower, and has significantly fallen in some countries, notably many of the more recent European Union member states (Bulgaria is the only EU country where there has

Economic System (choose one)	Political System (choose one)
1 A market economy is preferable to any other form of economic system.	1 Democracy is preferable to any other form of political system.
2 Under some circumstances, a planned economy may be preferable to a market economy.	2 Under some circumstances, an authoritarian government may be preferable to a democratic one.
3 For people like me, it does not matter whether the economic system is organised as a market economy or as a planned economy.	3 For people like me, it does not matter whether a government is democratic or authoritarian.

not been a decrease in support). These findings give cause for some concern: while the reduction in support for the market economy may be accounted for in the current economic climate, it is harder to explain why attitudes towards democracy have become less positive

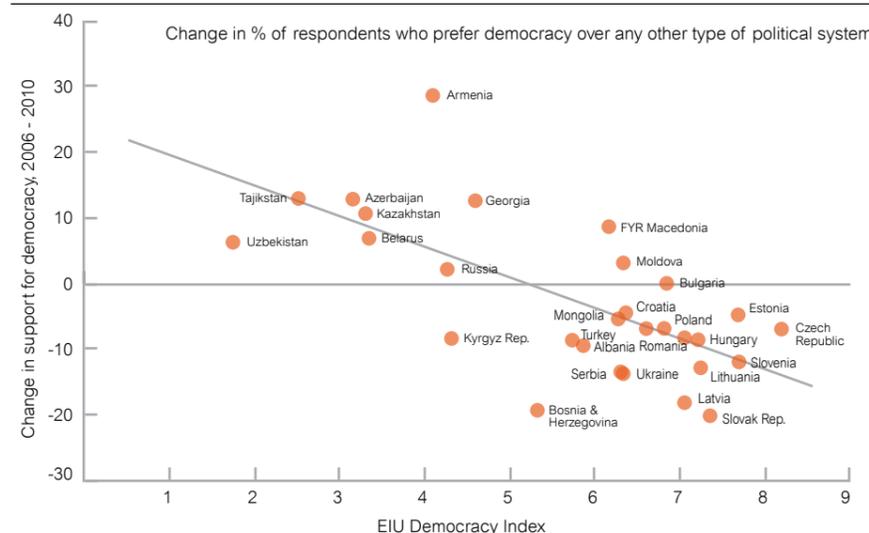
since 2006 in all the EU new states (again apart from Bulgaria).

Further analysis reveals that objective levels of democratic development as measured by independent think-tanks is linked not so much with overall support

for democracy, but with the change in support between waves 1 and 2 of the survey. People in countries that are less democratic according to the Economist Intelligence Unit³ or Polity IV⁴, are more likely to believe in the supremacy of democracy as a political system compared to the first wave. And vice versa, countries with more transparent electoral processes and greater civil liberties have lower support for democracy than in 2006 – sometimes by as much as 20 percentage points. Is it because citizens of these countries have had a chance not only to experience democracy but also become disillusioned with unrealised expectations of it (especially given the impact of the economic crisis), while less democratic societies have not had to go through this process? Interpretations abound and call for research tracking these trends over time, for the success of a democracy is, first of all, to be found in the support of its citizens.

In sum, the economic crisis has had a significant impact on the transition countries and their people, as well as in Western European countries. The latest *Life in transition* survey highlights that profound challenges remain in the transition region in terms of improving public services, reducing corruption and building trust in key institutions. Transition, however, was never going to be a straightforward process; it will continue to be complex, influenced by events at both the national and the global level. But people know that with the great challenge of transition comes the potential reward of a free and prosperous life ■

The preference for democracy has fallen most in more democratic countries



Source: *Life in transition* 2006 and 2010; Economist Intelligence Unit.
 Note: Percentage of respondents who prefer democracy includes respondents who agree with the following statement: 'Democracy is preferable to any other form of political system.'

¹ *Life in transition: After the crisis* was launched on 29 June 2011 as part of a series of events to mark the 20th anniversary of the EBRD's inauguration. The report can be accessed on EBRD's website www.ebrd.com or for more information contact Franklin Steves, EBRD Political Counsellor at StevesF@ebrd.com
² *Life in transition: After the crisis*. European Bank for Reconstruction and Development 2011.
³ The Economist Intelligence Unit's Index of Democracy 2010: http://graphics.eiu.com/PDF/democracy_Index_2010_web.pdf
⁴ The Polity IV Project, the Center for Systemic Peace: <http://www.systemicpeace.org/polity/polity4.htm>

Popular referenda and the power of public debate



Paulo Cidade
Ipsos, Brazil

How can one evaluate the extent to which it is possible to overturn widely held views? One thing is clear: you can improve your chances with a good understanding of the dynamics of public debate in a society, and with research that is able to pinpoint the nerve centres of the topic. The debate over the sale of firearms in Brazil – the subject of a referendum in 2005 and which has re-emerged as an important issue this year – is a good example of how this can be done.

In the second half of 2005, Brazil was preparing for an important decision. Sparked by discussions on the subject of urban violence, an ubiquitous topic in Brazilian society, it was decided that a referendum would be conducted to determine whether the sale of firearms should or should not be banned in the country.

Research conducted by Ipsos in August 2005 revealed that 69% of the population was against the carrying and sale of firearms (other polls at the time showed similar results). Yet just two months later, in October 2005, the majority (63%) voted in favour of the right to carry and sell firearms in the country.

How was such a strong trend overturned in such a short time span?

We believe that the explanation has its roots in three aspects:

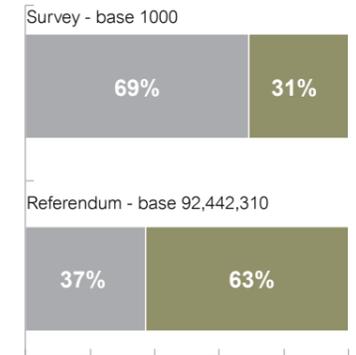
- » Relevance to the public.
- » Understanding of the social dynamics (there is a distance separating opinion and the decision-making process).
- » The strength of arguments related to the issue under discussion.

A turnaround in attitudes

Q. There have been discussions about a new public referendum where Brazilians will decide whether they want to prohibit or not the possession and sales of firearms. If this vote were cast today, would you vote for or against the prohibition of firearms possession and sales?

Q. Should the sales of firearms and ammunition be prohibited in Brazil?

■ Favour ■ Against



The first important question is to determine the extent of the relevance to the public of a given topic. Several studies have shown the logic behind the insertion into or exclusion from public debate of certain issues and how this tends to serve various interests. From the media, which may benefit from the presence of a certain issue, to other actors who can reap advantages from populist causes even without there being a realistic chance of them being adopted, to the objective relevance to the public – the extent to which its implementation may interfere with their daily lives.

Another aspect is the lack of familiarity and understanding on the part of the public and certain elements regarding specific social dynamics, such as the effect of infrequently occurring but highly dramatic events that impact public opinion forcefully. The issue of violent crime, for example, fits this context. While it may not be that common, the brutality and the dramatic nature of such occurrences increases the feeling of insecurity and risk on the part of the public and feeds the need for preventive measures.

Finally, we have the strength or weakness of certain arguments. Here the combination

of form and content is fundamental. How are we to understand the motivation behind certain opinions and the possibility that they will be decisive in the formulation of decisions? Does it have a moral basis? Does it involve values or is it tailored to fit circumstances? Does it take diverse elements into account or is it derived from a partial vision where the inclusion of a new argument can be transformative? These questions raise major challenges for the public opinion researcher, given that the form, acceptance and relevance of an argument to the public can signify the success or failure of a certain strategy.

This was the case regarding the discussion about regulating the sale of firearms in 2005, an issue that has resurfaced following dramatic new instances of urban violence in a Rio de Janeiro school that have led to a proposal for a fresh plebiscite on the question of a ban on the sale of firearms. Using this important public issue (violence), the various elements concerned (media, police, NGOs) have taken advantage of this moment of visibility to advance their own agendas. An evaluation of what occurred in 2005 will help us to understand the resurgence of this issue in 2011.

In favour of a firearms ban

When the debates about the public referendum on the sale of firearms began, supporters of the ban were enthusiastic about initial surveys which showed strong backing for their position. Although aware that this measure on its own may not be decisive in bringing about a radical change in combating violence, the discussion and approval of this ban could keep the public debate on how best to reduce violence broader than an exclusive focus on increased policing and the repression of crime.

At first it appeared to be a relatively easy cause. The ban did not seem to go against the general interests of groups or the population as a whole. To many, it seemed a cause easy to adopt, appealing to the eyes of segments like the church and not at all likely to expose sympathisers to any risk.

In general, changes of deep, underlying attitudes concerned with controversial issues are hard to bring about. Attitudinal theories usually demonstrate that such changes tend to occur only from one generation to another, or in light of dramatic facts such as the events of September 11 in the United States, capable, in a short period of time, of bringing about drastic changes, which was not the case in Brazil at the time.

But what was at first a very promising scenario did not unfold as expected.

Against the ban

The group that argued against the ban probably viewed this scenario in a very similar manner and realized that their chances of victory did not lie in a frontal assault on those arguments.

One way out of the impasse would be the adoption of a new argument, a new angle that would reopen the discussion and direct it towards another facet of the issue, outflanking the opposition.

An analysis of the principal concerns of the public would have revealed that the issue of combating violence and banning the sale of weapons would be virtually impossible to defeat, given that violent crime and drug trafficking were high on the public's list of the most important problems facing the country:

Unemployment	61%
Violent crime/ violence in general	29%
Low wages	28%
Corruption and misappropriation	26%
Poor quality of public health services	22%
Drug traffic	22%

However, the reading of two other data could suggest other possibilities. During the same period public polls revealed the perception that the country was on the wrong track (66%) rather than the right track (30%). And the main news items recalled by the public were the vote-buying scandal in Congress (46%) and the corruption of public officials (17%).

At a time of many advances and changes in Brazilian life (particularly on the economy), discussions about the role of the State in the new Brazilian context, defining the type of society desired and whether the regulation of public life should or should not occur would tend to gain more space.

In the perception of the people, we were not on the right track and corruption was the topic that dominated the media. The freedom to decide and to minimise the regulatory role of the State surfaced as a new aspect, as a new argument that could defeat the easy contentions favouring regulation.

Why allow the State to decide what you could or could not buy? Was there a proven benefit to be gained from this concession? Could this become a precedent for other limitations on the citizen's right to choose, to consume, of his own free will?

This was the route discovered for the counter arguments. Not only did this approach question the specific merit of the proposed measure and its doubtful effectiveness, but it raised the discussion to a wider and, in some ways, higher level: the liberty of people to take their own decisions.

This reasoning changed the direction of the debate. It elevated the discussion to a plane that encouraged a more profound debate not only of the effectiveness of the proposal to ban the sale of firearms, but also of the way in which themes of major importance should be decided. Various media vehicles took a strong stance against the proposal and the focus shifted from the pertinence of whether the public should or should not be allowed to decide about the sale of firearms.

The outcome was the historic turnaround from the initial surveys showing 69% in favor of the ban to 63% who eventually voted against the ban. It should be pointed out that part of this turnaround was due to the fact that the movement favoring a ban on the sale of firearms failed to react to this change of strategy. It



remained focused on its initial position and failed to perceive the shift in public opinion towards the new arguments favoring the individual's freedom to decide.

A new discussion

Once again, the issue of banning the sale of firearms has entered the public debate following a proposal by the Brazilian Senate to conduct another referendum in September 2011, motivated by the shocking occurrence in a Rio de Janeiro school, where an ex-student gunned down twelve children and injured another twelve. In a new survey on the issue in April 2011, we found that 83% of the public now favour a ban on the sale of firearms. This opinion is generalised across all geographical regions, incomes and socio-economic classes.

Final considerations

The proposal tabled by the Senate remains to be voted on, but it will certainly

be difficult to predict the outcome of the new referendum due to the number of possible variables that would have to be considered. What this case demonstrates is the need to construct an analytical frame that will allow a more profound evaluation of a debate of this nature. In particular, we have learnt that we need to consider:

Relevance: themes that deal with issues at the top of the public agenda will always resonate, even if they do not cover objective solutions. The level at which the public will begin to accept regulation is an indicator of this generic relevance.

Set of arguments: mapping of the set of arguments under consideration and identification of which can be considered positive or negative drivers. In this case, defenders of the unregulated sale of firearms read the scenario well in two ways: they perceived that the cause itself did not have strong arguments in its

favour, and they inserted arguments that could be recognised by public opinion as related and germane to the issue (defense of liberties).

Winning over advocates for the cause:

by including newer and more ample arguments in favour of the unregulated sale of firearms, they expanded the possibility of conversions. This amplitude in the debate brought to surface issues such as consumer freedom, which overshadowed the real issue at stake - the unregulated sale of firearms. This goes to show that an accurate understanding of a scenario as well as the ability to pinpoint potential allies for new themes, can determine the difference between victory and defeat of an issue in the public debate ■

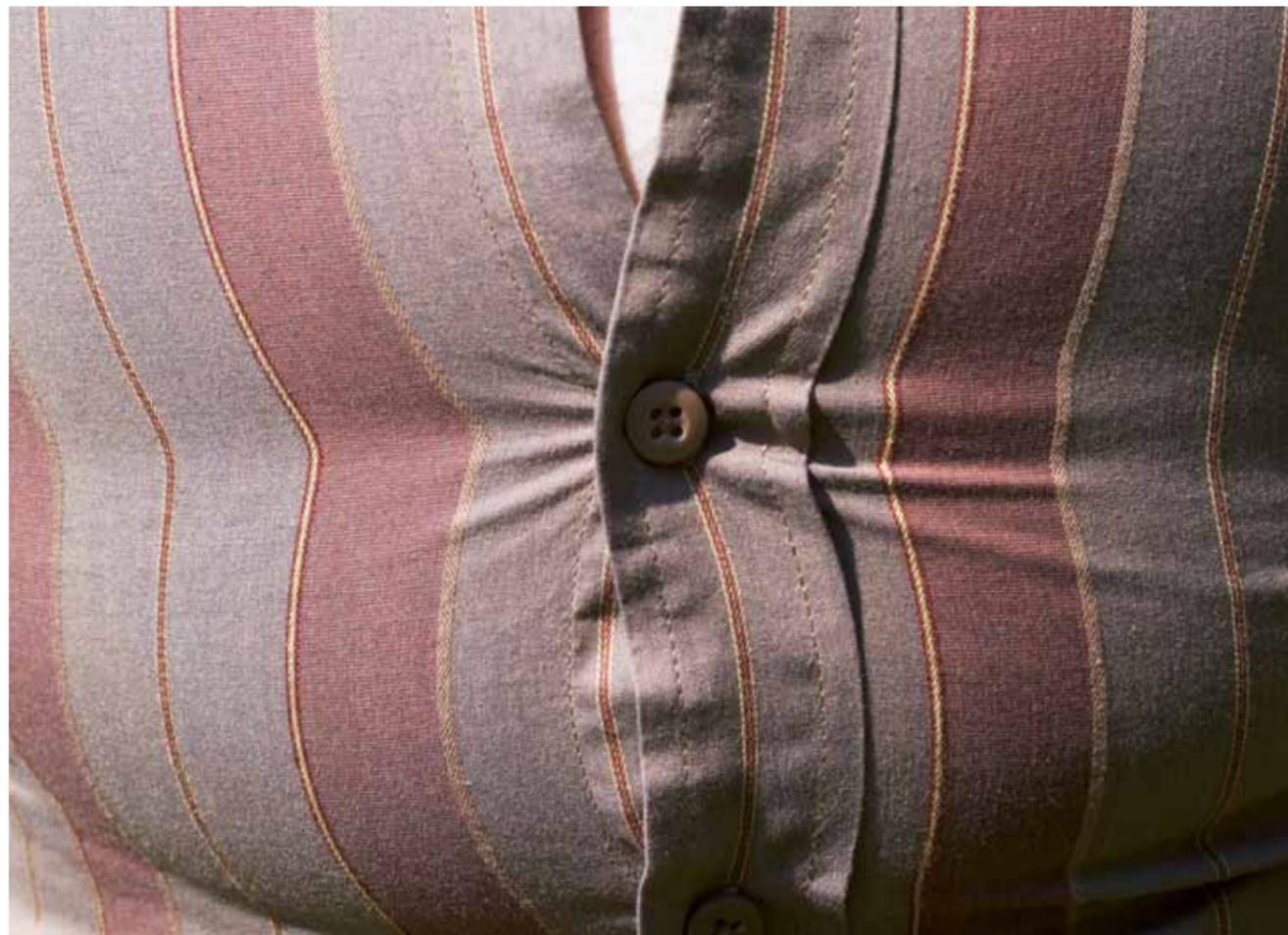
Nudging, shoving and the challenge for policy makers



Dr Chris Branson
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Mike Colledge
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Across the globe, interest in behaviour change is on the rise. Many of the biggest challenges we face as societies would be massively alleviated if we altered our existing behaviours and habits. By eating more healthily and exercising, for example, we could reduce the cost to our healthcare systems of ‘lifestyle diseases’, such as obesity, heart disease and type 2 diabetes. And with treatment of largely preventable diabetes projected to cost the USA \$500 billion annually by 2020, the stakes are high¹. In recent years, the ideas of ‘behavioural economics’ – which can perhaps be understood as applied social psychology – have been popularised through work such as Thaler and Sunstein’s *Nudge*². Combined with the broader political context of escalating health costs, aging populations and environmental change, this wider publicity has brought behaviour change research firmly into the political arena.

Not that interest in behaviour change is new. Governments have long sought to influence the behaviour of their citizens, with their traditional approach involving the use of legislation, regulation or a financial imperative, such as taxation. This method, which we can think of as “shoving”, can be characterised as more obviously interventionist and paternalist than the newer idea of “nudging”. Nudging may be understood as “any aspect of the choice architecture that alters people’s behaviour in a predictable way without forbidding any options or significantly changing their economic incentives”³. A simple example of nudging is the strategy of positioning healthy snacks instead of chocolates next to tills in shops, preferably at eye-level. The idea here is that consumption of healthy food is likely to increase if people spend more time exposed to these products. In this way, an alteration in behaviour is achieved by modifying how people make their choices, but without the use of legislation.

From this point of view, nudging appears much more attractive than shoving since many governments now seek a smaller role for the state and fear the political cost of introducing prohibitions. Furthermore, nudges are perceived as a less expensive way of achieving predictable results than through costly legislation, and can be applied to a wide range of problems. Having said that, the cost-effectiveness of nudging is yet to be proven, and its success in producing sustained behaviour change is undetermined. Certain recent nudge schemes in the USA have failed to deliver decisive change, with official predictions

of startling results not always matched by reality⁴. And in truth, the dichotomy of “nudge” and “shove” should not be seen as an opposition, but rather as a way of describing two broad tools available for policy-makers.

A successful and comprehensive approach to behaviour change will likely require a combination of nudge and shove techniques. A shining example of a successful mixed approach is drink driving, where the nudges of advertising and the shoves of legislation have resulted in significant changes over a period of twenty years – not only in the prevalence of drink driving, but also in underlying public attitudes toward it⁵. But the challenge for policy makers is not only to understand the specifics of the behavioural problem in enough detail to devise the most effective approach. When it comes to intervening in people’s lives, it is not enough to know what works in theory: it is also crucial to understand what the public will find acceptable.

Nudges are perceived as a less expensive way of achieving predictable results than through costly legislation

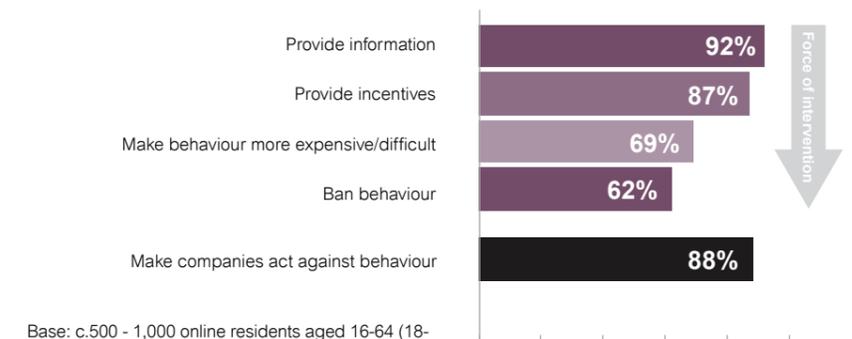
Broad global support for behaviour change policies

While public acceptability is by no means the only factor determining which approach to behaviour change will work, it does give an indication of the spectrum of appropriate options available. Ipsos recently decided to investigate what the public think about a range of behaviour change policies – from the gentlest nudge to the firmest shove – in four different areas of public policy. Our Global @dvisor survey asked working-age individuals in 24 countries across the globe for their opinions about a variety of interventions aimed at reducing unhealthy eating, smoking, the use of environmentally unsustainable products and a lack of retirement savings⁶.

We found that, across the globe, there is broad support for government intervention into undesirable behaviours, with majority approval for each level of intervention. As one would expect, the provision of information about how to change one’s behaviour is uniformly popular worldwide, with an average of 92% support across the four policy areas. But more surprisingly, perhaps, six in ten individuals in the 24 countries polled (62%) approved

Support for intervention across the board, although people are warier of stricter legislation

What, if anything do you think government should do? (average across all four policy areas)



Base: c.500 - 1,000 online residents aged 16-64 (18-64 in the US and Canada) in 24 countries, Nov 2010

Source: Ipsos Global @dvisor

of legislation that prohibits the behaviour altogether, such as outright bans on smoking or unhealthy foods.

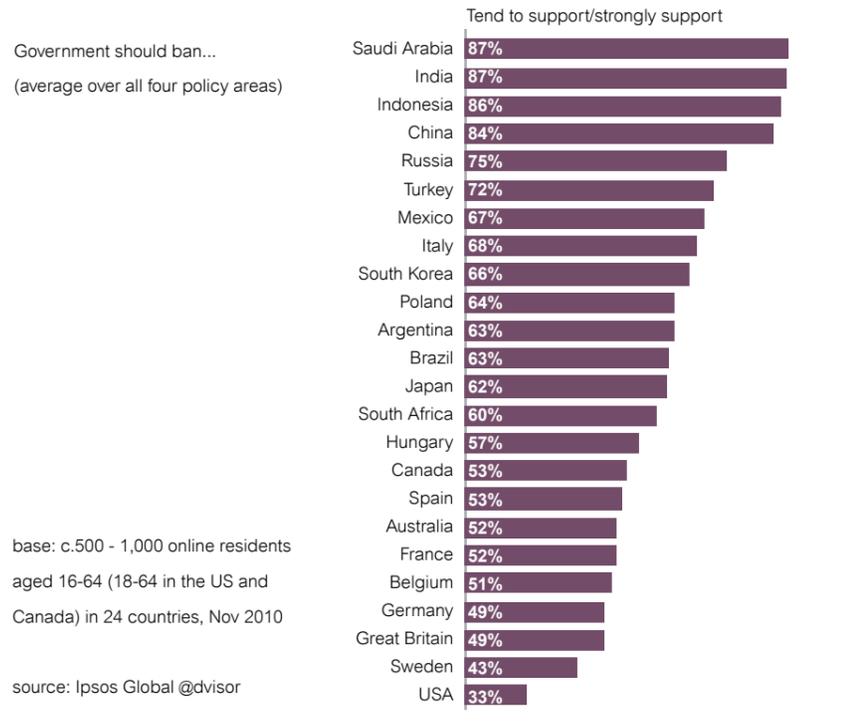
The above results do, however, highlight the fact that support for intervention decreases as the “force” of the intervention increases. The more freedom people lose because of an intervention, the lower the support it receives. And our overall result of majority support for all interventions is placed in context when we note that on average 50% also agreed with the statement that “Government should not get involved” in people’s decisions in each behavioural area. In other words, while a majority may agree that a particular intervention policy is a good idea, we still observe a strong gut reaction against government intervention among many people.

Nudges are generally popular, but shoves divide global opinion

In addition to this broad pattern, we also observe interesting differences in national support for the different levels of intervention across our four policy areas. These findings emphasise the diverse challenges faced by policy makers across the world who want to change public behaviours, but they also provide us insight into the varied factors that drive opinion about behaviour change policies.

Looking at differences between nations, attitudes to intervention become more divided as the force of intervention is increased. While support for being provided with information about how to change one’s behaviour is uniformly high across the globe (four out of five or higher), the question of mandatory legislation reveals the full extent of global political diversity. Fifty-four percentage

Mandatory legislation shows the full extent of political diversity



points separate the USA, the country least supportive of government prohibitions (33%), from Saudi Arabia and India, the two countries most in favour of legislation that bans the behaviour outright.

A pattern emerges if we also consider that support for incentives schemes, such as money-off vouchers for healthy foods, has a global range of 22 percentage points (with Sweden least supportive at 73%), while approval of partially-restrictive legislation, such as increasing the price of unhealthy foods, spans a larger range (42 percentage points, with a low of 46% in the USA). In short, it appears that nudge policies are broadly popular worldwide, probably due at least in part to the fact they place less burden on the individual. Shove policies, by contrast, are significantly more divisive, revealing clear differences

between nations, and thus raising important questions about what drives public opinion about behaviour change legislation.

Wealthier nations less supportive of intervention

When it comes to understanding global differences in support of intervention, national wealth is an obvious place to begin. And when we consider relative GDP per capita a clear pattern emerges, particularly in relation to support for partially-restrictive legislation aimed at making the behaviour more difficult or more expensive – a smoking ban in public places, for instance. We find a particularly strong correlation here, with the USA being both wealthiest and least supportive of such legislation, and with India, China and Indonesia – the least

wealthy nations per capita – being most supportive of this level of intervention. We also find that wealthy nations are most protective of business, with the USA showing by far the strongest opposition to legislation directed at those companies whose business promotes the behaviour in question. But wealth does not explain everything: France, for example, is relatively supportive of restrictions on business, suggesting that wider cultural factors may be just as important.

Furthermore, a demographic analysis of individuals within each nation reveals an opposite trend, with the wealthiest members of society tending to be more supportive of intervention than those from lower income groups. In particular, people in higher income brackets show more support for making unhealthy foods more expensive and for banning them altogether. On the other hand, when it comes to incentive schemes, we find that the poorer members of society are more supportive than average of government schemes such as money-off vouchers for healthy food. This makes broad intuitive sense, with those most capable of adapting to an intervention showing more approval, while those who would be hardest hit being more resistant. But this pattern does suggest an interesting paradox in light of the broader finding that wealthier countries as a whole are less supportive of intervention.

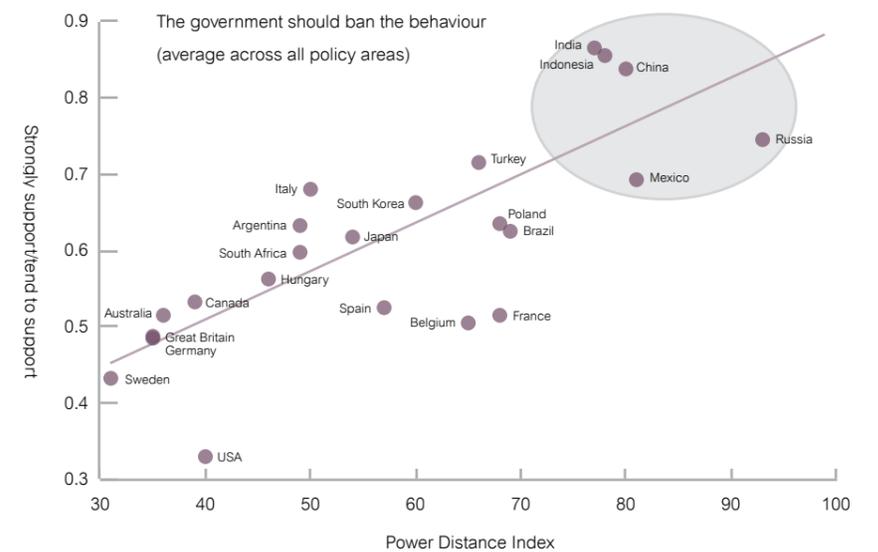
Broader cultural factors may explain the trend?

Given that there is no uniform pattern by simple demographics, we might appeal to cultural differences. More specifically, we might wish to question whether support for intervention really is a simple story of relative wealth.

Geert Hofstede’s ‘Power Distance Index’ (PDI) is a measure of the extent to which members of society accept and expect that power is distributed unequally.⁷ A high power distance will indicate that inequality due to power, wealth or status has come to be entrenched. Cultures with a high PDI tend towards centralised, top-down control, whereas low power distance implies greater equality and empowerment of citizens. With regard to our Global @dvisor data, we find that

support for mandatory legislation, aimed at banning behaviours, is particularly strong in countries with a high PDI. As such, a broad polarisation between conservative cultures and liberal democracies might prove a more useful way of understanding

Countries with a higher inequality of power more supportive of prohibitive legislation



Base: c.500 - 1,000 online residents aged 16-64 (18-64 in the US and Canada) in 24 countries, Nov 2010
Source: Ipsos Global @dvisor / Hofstede Cultural Dimensions
Nb. PDIs for China, Hungary, Poland and Russia are estimate values; there is currently no individual PDI for Saudi Arabia.

differences in national support for prohibition than the appeal to GDP. We find a similar pattern when comparing our data with Inglehart and Welzel’s ‘Survival/Self-Expression values,’ which measure the extent to which the immediate concern of individuals in a nation has to do with material essentials or personal interests.⁸ These findings suggest that a consideration of the political system and cultural values of a country may help inform us of the extent to which

But wealth does not explain everything: France, for example, is relatively supportive of restrictions on business, suggesting that wider cultural factors may be just as important.

strong “shove” policies in particular may or may not be met with approval. For this reason, any approach to behaviour change should be complemented by an in-depth understanding of how it will fit within the cultural values and drives of a society.



Conclusions

Whether we call it behaviour change or applied psychology, with the looming scale of some of the world's biggest problems, the appeal of this social intervention is unlikely to pale for politicians. The first message from our research is that – perhaps surprisingly – there is support for behaviour change intervention across a wide spectrum of the globe, although this support does fall as more freedoms are lost due to the intervention, and there does seem still to be a gut instinct against a 'nanny state' among many.

In addition to this, our research highlights the diversity of global opinion when it comes to questions of government intervention. Our findings suggest that a "one size fits all" approach to behaviour change will not work. In order to be able to develop the most appropriate solution to a behavioural problem, policy makers must first gain an understanding of the specific political, social and cultural context of that problem in their individual country. Likewise, businesses wishing to anticipate the effects of behaviour change policies must take note that international responses are likely to be varied and nuanced.

Of course, for behaviour change policies to be a success, the particular initiatives need to be carefully defined, understood and tested, and the Ipsos Social Research Institute offers a comprehensive research approach that includes deliberative techniques and evaluative follow-ups. But our data show that the first step for any policy maker must be to take in the wider cultural landscape in order to understand their public in as much detail as possible ■

¹ (2010) The United States of Diabetes: Challenges and opportunities in the decade ahead. United Health Working Paper 5, Nov 2010, p.9. www.unitedhealthgroup.com/hrm/UNH_WorkingPaper5.pdf

² Thaler, R.H., and Sunstein, C.R. (2008) *Nudge: improving decisions about health, wealth, and happiness*. New Haven: Yale University Press.

³ Thaler, R.H., and Sunstein, C.R. (2008) p.6.

⁴ See, for example, the discussion of New York State's calorie count in restaurants initiative in Ebel, B., Kersh, R., Brescoll, V.L. and Dixon, L.B. 'Calorie Labeling and Food Choices,' in *Health Affairs* 28:6 (2009): <http://content.healthaffairs.org/content/28/6/w1110.abstract> (accessed 09.06.11). Or this criticism of the inflated expectations of the Sacramento scheme of introducing peer competition into energy consumption: Loewenstein, G. and Ubel, P. 'Economics Behaving Badly,' in *The New York Times*, 14th July 2010: www.nytimes.com/2010/07/15/opinion/15loewenstein.html (accessed 09.06.11).

⁵ <http://www.icap.org/PolicyIssues/DrinkingandDriving>

⁶ Since Global @dvisor is an internet survey, our results from the 24 nations have to be interpreted in this context. For example, data from developing nations may be less representative of the nation of a whole, although the views of these small, "connected" groups may be especially opinion-forming. In other countries certain biases may enter the results if the internet is not perceived to be private by the public. And more generally, it should be remembered that internet penetration is by no means globally uniform. Base: c.500 - 1,000 residents aged 16-64 (18-64 in the US and Canada) November 2010. Argentina, Australia, Belgium, Brazil, Canada, China, France, Great Britain, Germany, Hungary, India, Indonesia, Italy, Japan, Mexico, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America.

⁷ www.geert-hofstede.com/

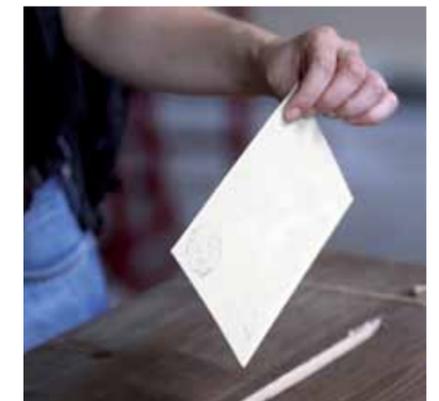
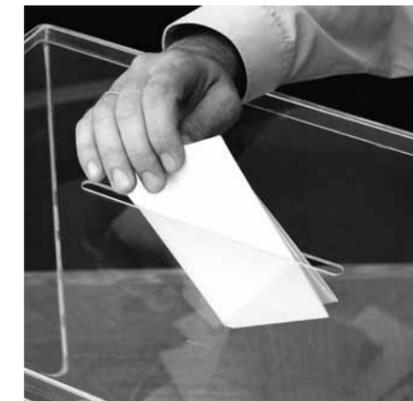
⁸ www.worldvaluessurvey.org/wvs/articles/folder_published/article_base_54. Data available here:

www.worldvaluessurvey.org/wvs/articles/folder_published/article_base_54/files/ValueScores_5_waves.doc (accessed 09.06.11).

Ipsos political briefing three continents, three elections



Helen Cleary
Ipsos MORI, UK



The first half of 2011 demonstrated the diversity of Ipsos' international election polling expertise. In recent national elections in Scotland, Nigeria and Canada, Ipsos correctly predicted the outcome in all three elections, overcoming very different challenges and developing pioneering approaches in each country.

In Scotland, a Labour lead in the general election in 2010 meant that few expected a landslide win for the Scottish Nationalist Party just a year later. Ipsos MORI was the first polling company to detect shifts in public opinion towards the SNP, and later in the campaign provided the first indication of the scale of the SNP victory. Its final poll was recognised for producing the most accurate polls in predicting the outcome, as shown in the Scotland Votes article at: www.scotlandvotes.com/blog/opinion-polls-vs-result.

In Nigeria, the relative newness of political polling coupled with the geographically and politically diverse nature of the country presented very different challenges. Ipsos Nigeria, working in partnership with Ipsos partners in the US, South Africa and the UK, correctly predicted the presidential election winner, Goodluck Jonathan. The team also correctly predicted the state level results in 31 out of 37 states. The scale of the campaign polling, incorporating both face-to-face and telephone interviewing, was unprecedented in Nigeria. The polls were commissioned by national newspaper Thisday to further its contribution to transparent and credible elections.

The Canadian context was different again, with pollsters facing a shifting political landscape; the Conservative party won a majority after leading two minority governments since 2006 and the popularity of the left-leaning New

Democratic Party surged, resulting in a realignment of the opposition parties. Nevertheless, Ipsos Reid's final poll in the Canadian federal election accurately predicted the Conservative victory, within the margin of error for each party. Ipsos Reid also provided real-time instant feedback during the English language leaders' debates via real-time polling and tracing, uniquely incorporating quantitative, qualitative, and ethnographic research techniques.

While election polling always relies on local knowledge, the breadth of Ipsos' international political research experience – and the expertise of our researchers and analysts – means that we are able to conduct innovative and robust election polling across varied countries, and even continents ■

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