

TRAJECTORY

Polarisation

Trajection 2020/2

February 2020



SIGNAL

Poles Apart

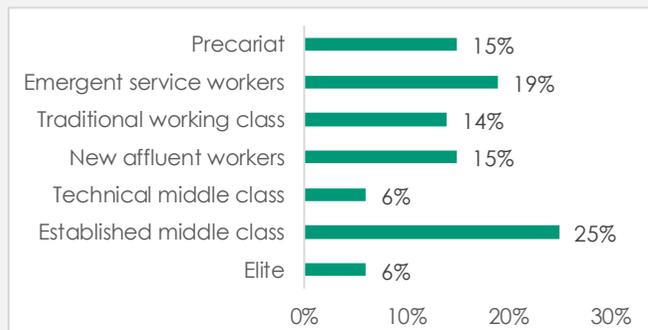
We live in a post-national era of trends. Where once researchers, strategists and analysts could talk of national trends or the mood of the nation we now have fragmentation and polarisation.

This fragmentation is particularly evident in some of the structural foundations of the UK. As incomes, access to capital, employment and education have diversified [the simple framework of lower, middle and upper class has disappeared](#), to be replaced by a more stratified tiering. In demographics, longevity and ageing are not felt in the same way across the population. Life expectancy increases have stalled in the last decade, but country by country data suggests that the component parts of the UK are seeing very different trends.

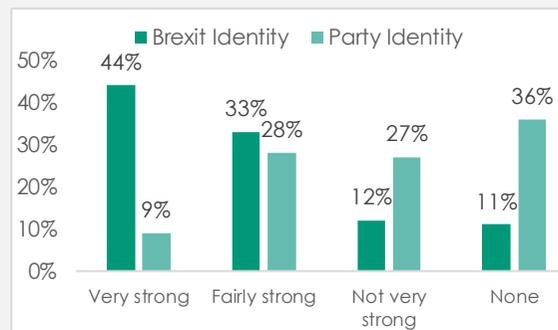
This polarisation is evident not just in the structural economic and demographic characteristics of the population but the mood – or moods – of its citizens too. The EU referendum did not create new divides, but it did exacerbate them, and give them names and identities. Those identities are still keenly felt – [77% of UK consumers strongly identify with leave or remain](#) – and shape our views of the present and the future.

This attitudinal polarisation is critically important. The Brexit divides, alongside widening differences in demographic and economic characteristics, have allowed many topical, political or contemporary issues to become flashpoints for division. 2020 is only a few weeks old, but already the daily news cycle has been propelled through debates on [identity politics, whether Big Ben should chime](#) at the moment of Brexit, [the extremism \(or not\) of environmental protestors](#) and [Terry Gilliam's views](#) on the #MeToo movement. While there is no direct or automatic overlap between our Brexit identities and these issues the weight of that debate entrenches polarisation around other issues.

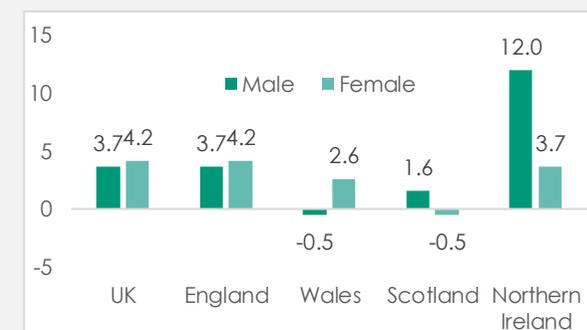
New Social Classes (BBC, Mike Savage, GBCS, 2013)



Political Identities (What UK Thinks 2018)



Life expectancy change (weeks, 2015-18, ONS)

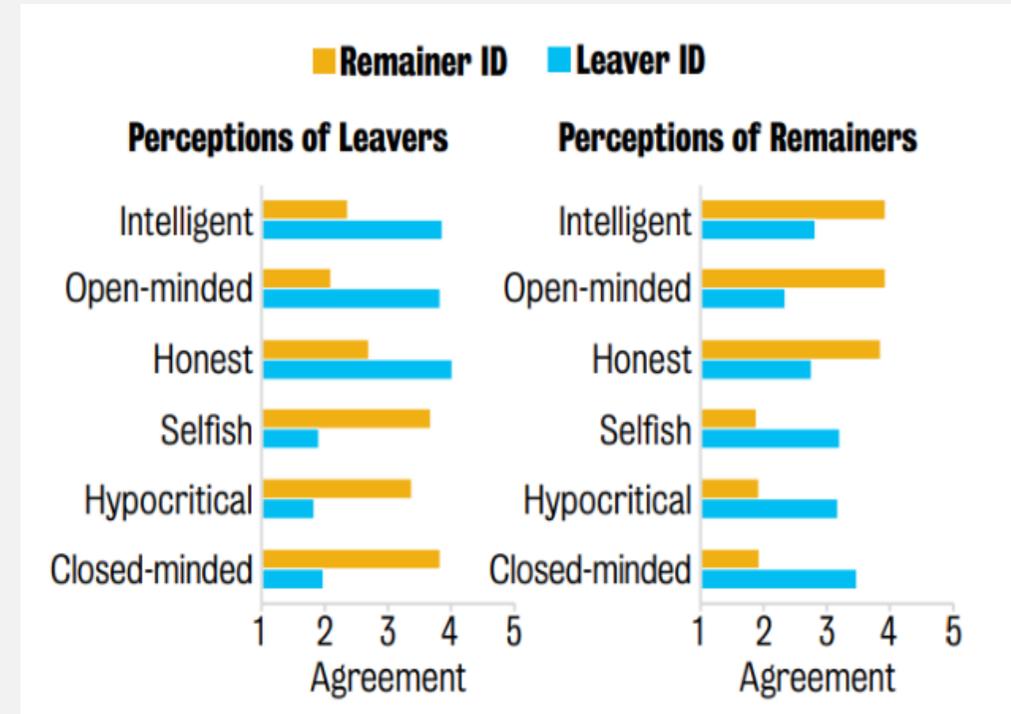


Defining polarisation

Not all polarisation is created equal and it is important to be precise around terminology. [A recent KCL Policy Institute paper helpfully defines the key facets of polarisation:](#)

- **Issue Polarisation:** the divisions formed around one or more policy positions or issues. Some also argue that, to be meaningfully polarising, issues need to be important (or 'salient') to a large section of the public, not just a minority of people with strongly held views.
- **Affective Polarisation:** when individuals begin to segregate themselves socially and to distrust and dislike people from the opposing side, irrespective of whether they disagree on matters of policy.

We would argue that both of these types of polarisation are taking place in the UK. They are interrelated – one leads to or intensifies the other. The same paper highlights a hugely revealing – although probably not that surprising – survey finding on what each side of the Brexit divide thinks of the other. Remainders tend to think Leavers are selfish, hypocritical and closed minded. The good news is that Leavers think exactly the same of them.



Brands in the crossfire

Against this backdrop, anything can be political. This creates a new and powerful challenge for brands on two fronts:

- Firstly, to retain meaning, they may have to lean into political debates and take a side on the issues of the day
- Secondly, they can be dragged into political debates with no warning and no agency

A highly contemporary example of this is the unfortunate case of Yorkshire Tea, who had the bad luck to be featured in a tweet by the Chancellor. As their social media team highlighted the next day, this association was enough to spark ire and opprobrium among a selection of their (former) customers.

Some brands have had significant success taking ownership of an issue. Examples here include [Nike's Colin Kaepernick advert in the US](#), HSBC's [We Are Not an Island Campaign](#) and Gillette's [The Best a Man Can Be spot](#). These campaigns dealt with a wide range of issues but all had one thing in common: they polarised opinion, creating a debate and pitting one side against the other. 2019 saw some brands pick comparatively safer battles – Amazon leaning into a debate about social isolation, Visa the death of the high street – but others waded into to some of the most divisive issues out there, such as [Netflix getting involved in a legal challenge against new Abortion legislation in Georgia](#).

Understanding the risks and rewards of political association is an essential new requirement for brands. But how can they know which issues to lean in to, and which to avoid?

Yorkshire Tea @YorkshireTea

So it's been a rough weekend.

On Friday, the Chancellor shared a photo of our tea. Politicians do that sometimes (Jeremy Corbyn did it in 2017). We weren't asked or involved - and we said so the same day. Lots of people got angry with us all the same.

Rishi Sunak @RishiSunak

Quick Budget prep break making tea for the team. Nothing like a good Yorkshire brew.

Yorkshire Tea @YorkshireTea

Replying to @RishiSunak

Nothing to do with us - people of all political stripes like our brew.

Plus there's no way we'd intentionally stick ourselves in a Twitter storm on a Friday afternoon. It's nearly bedtime!

4:19 PM · Feb 21, 2020 · Twitter Web App

That's @YorkshireTea fucked hehehe

@YorkshireTea you can tell a lot about company by the people that endorse it. Parasitic hedge funds.

Well, I can't wait for 500,000 Labour Party members to boycott @YorkshireTea

@YorkshireTea Your brand is fucked.

@YorkshireTea why are you promoting this fool no longer buying your products.

Well, that's the size of Picking death to that brand now. @YorkshireTea is this okay with you?

Well, that's how it looks so goodbye from me to Yorkshire Tea.

1:40 PM · Feb 21, 2020 · Twitter for iPhone

638 Retweets 7K Likes

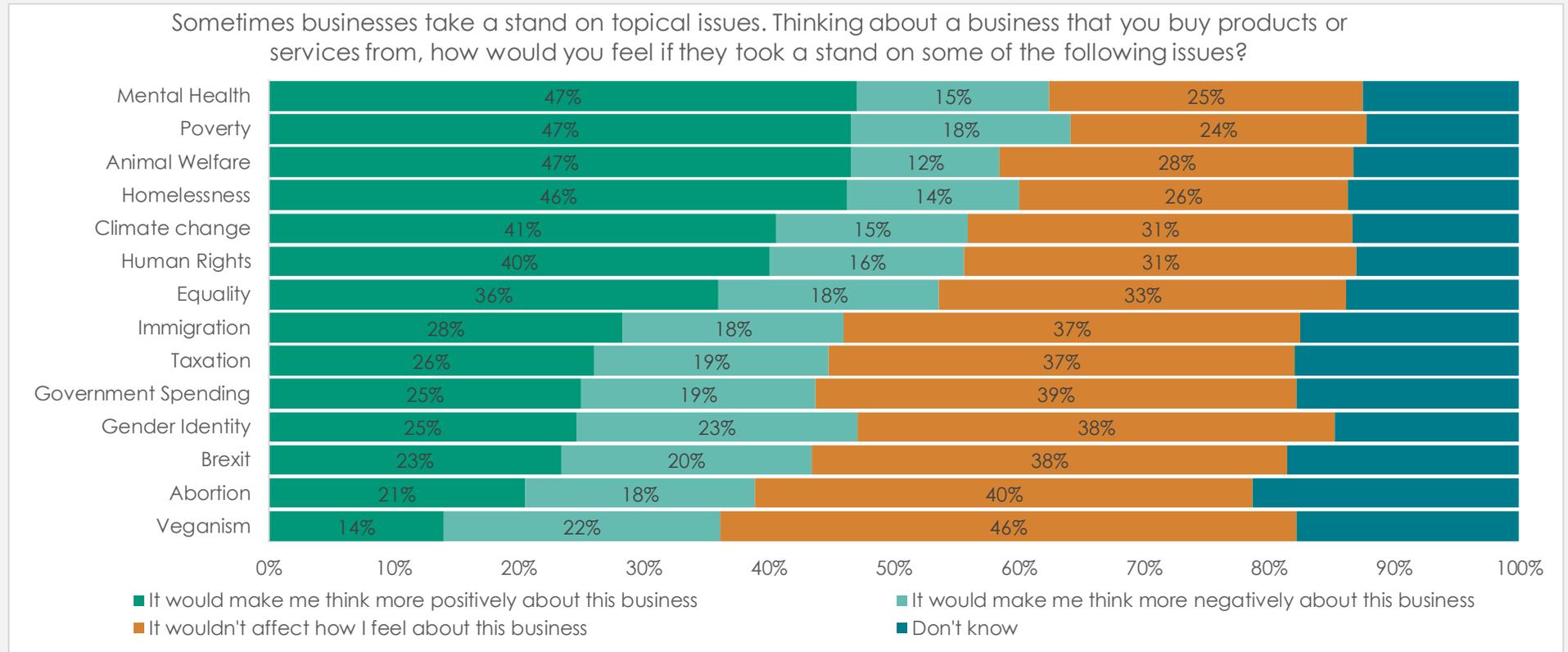
4:09 PM · Feb 24, 2020 · Twitter Web App

8.2K Retweets 53.9K Likes

The Polarisation Index

To support this, we have created a new Polarisation index.

This is based on data collected from a nationally representative sample of GB consumers. We captured their likely response to a brand they use taking a stance on one of 14 potential issues, from Brexit and Government Spending to Mental Health, Poverty, Abortion or Veganism.



Source: Trajectory Optimism Index, December 2019

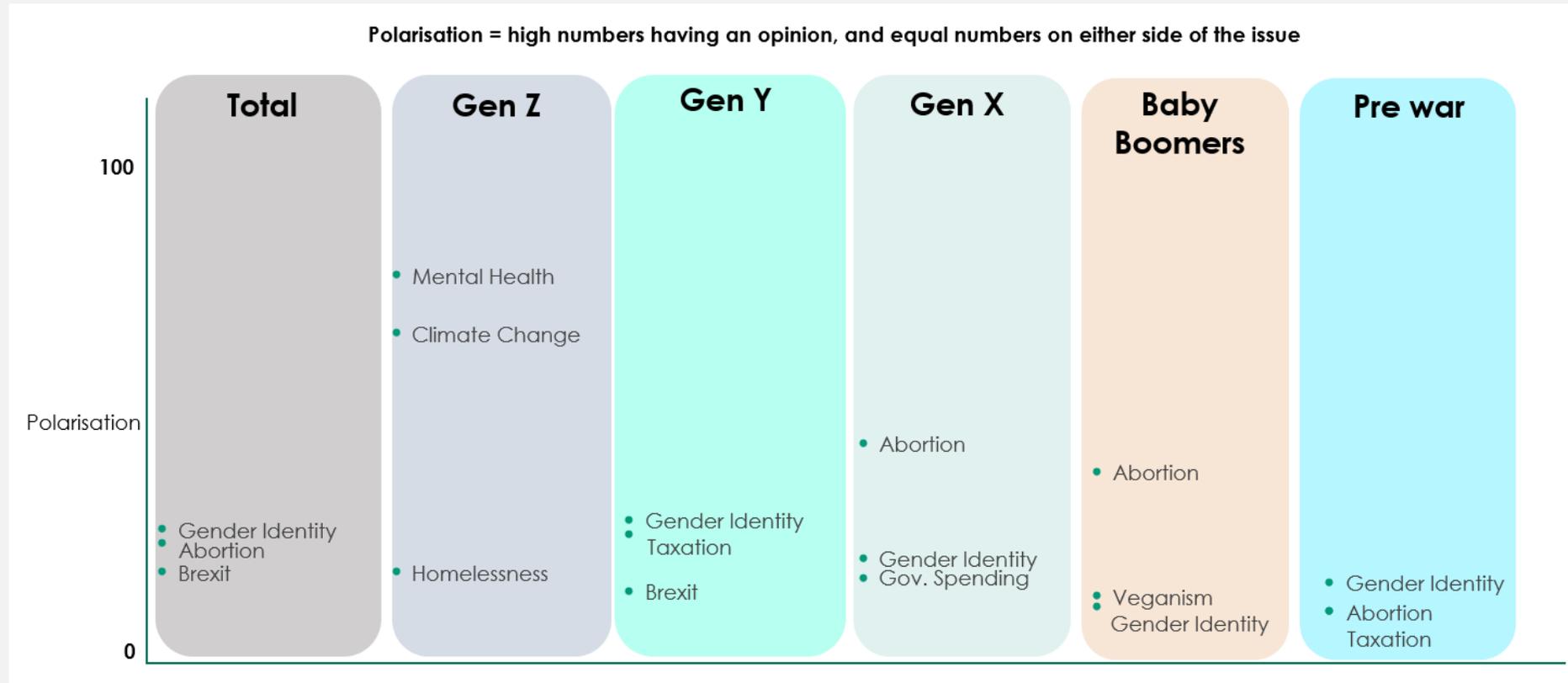
At a topline level the results present some immediate steers: there are four clear areas in where a brand appears to have the most to gain from taking a stand: Mental Health, Poverty, Animal Welfare and Homelessness. Here, almost half of consumers would feel more positively about a business that spoke out and only around one in six would feel negatively (the remainder either don't know how they'd be affected or wouldn't care either way).

There are more sensitive issues. Brands should tread carefully before weighing in on Brexit, Gender Identity or the ever-controversial Veganism. Here only one in four (or less) consumers would welcome such a intervention, and the same number would actively reject it.

But this is not polarisation, and brands will find little to gain in supporting issues that do not cut through. Can you imagine a brand taking the opposite position – pro-poverty, for example? There is value in polarisation and balancing opprobrium and support in (nearly) equal measure. Here brands must think carefully about both this balance and how authentic their voice will be.

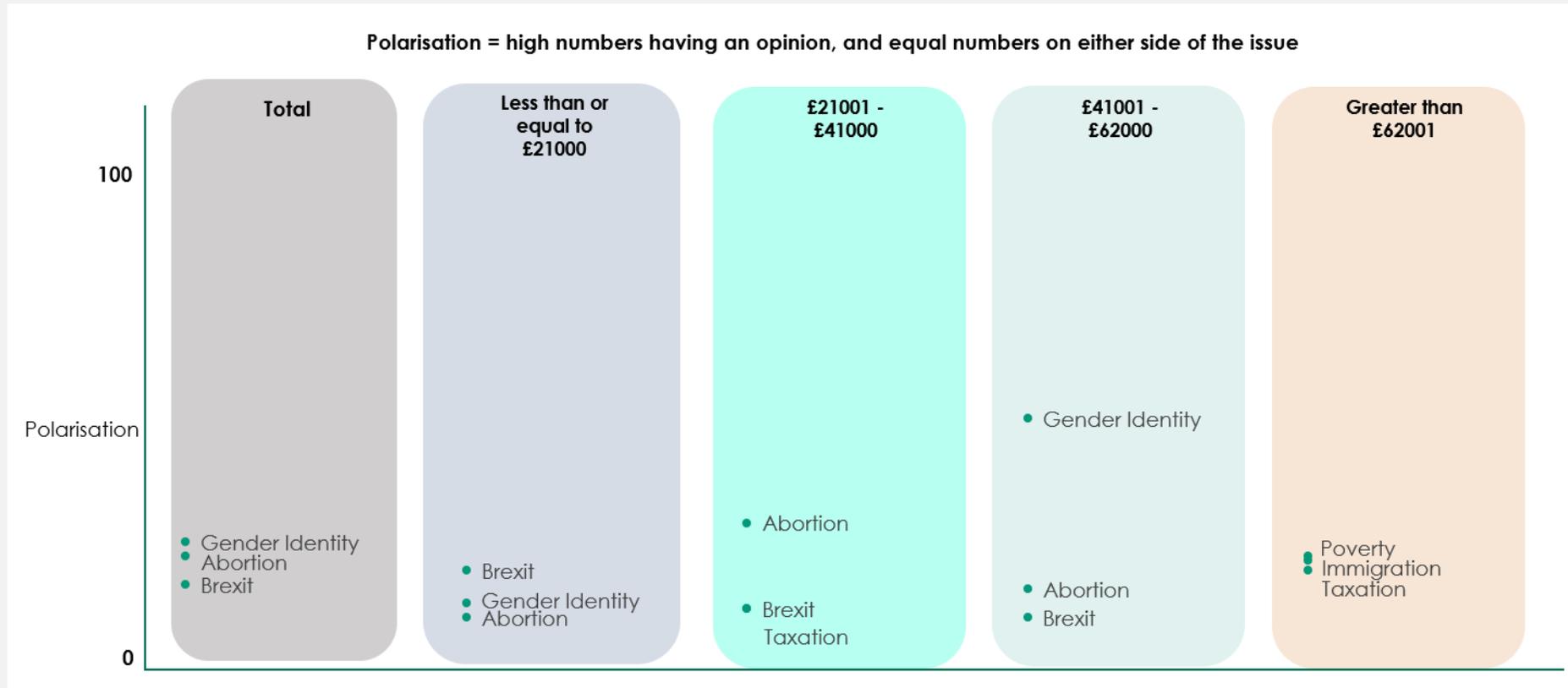
Our Polarisation Index measures both the strength of feeling, the balance of division and the saliency of an issue. Running from 0-100, to score 100 an issue would have to cause all consumers to change their minds about a brand and for that to break evenly on either side of the issue.

The Polarisation Index: Generation



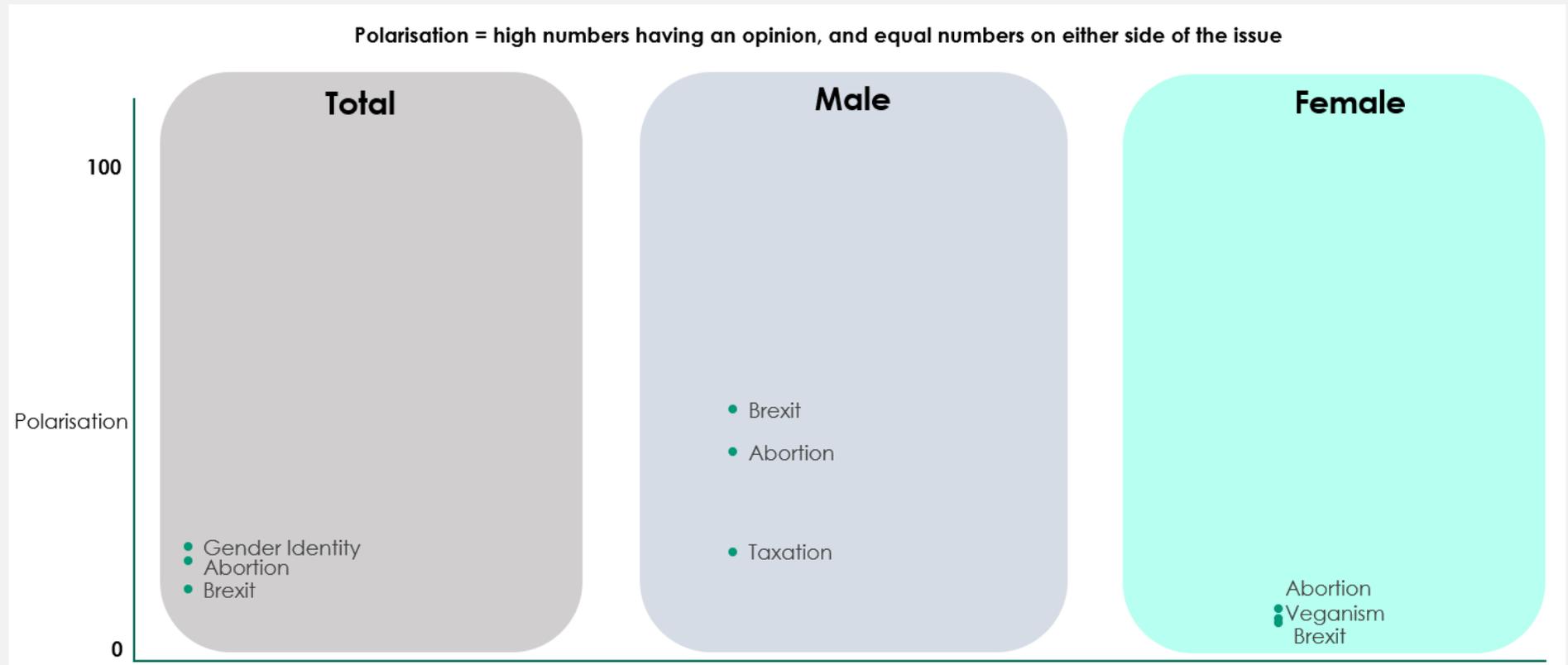
The most polarising issues for Gen Z are mental health and climate change – this is a clear warning for brands to tread carefully around these ‘obvious’ Gen Z issues. These concerns are not straightforward for Gen Z and many would not welcome a corporate voice here. However, in contrast to older generations, abortion is not a controversial or polarising topic for them – which is why Netflix is on solid ground in its fight against more restrictive abortion policies in the US.

The Polarisation Index: Income



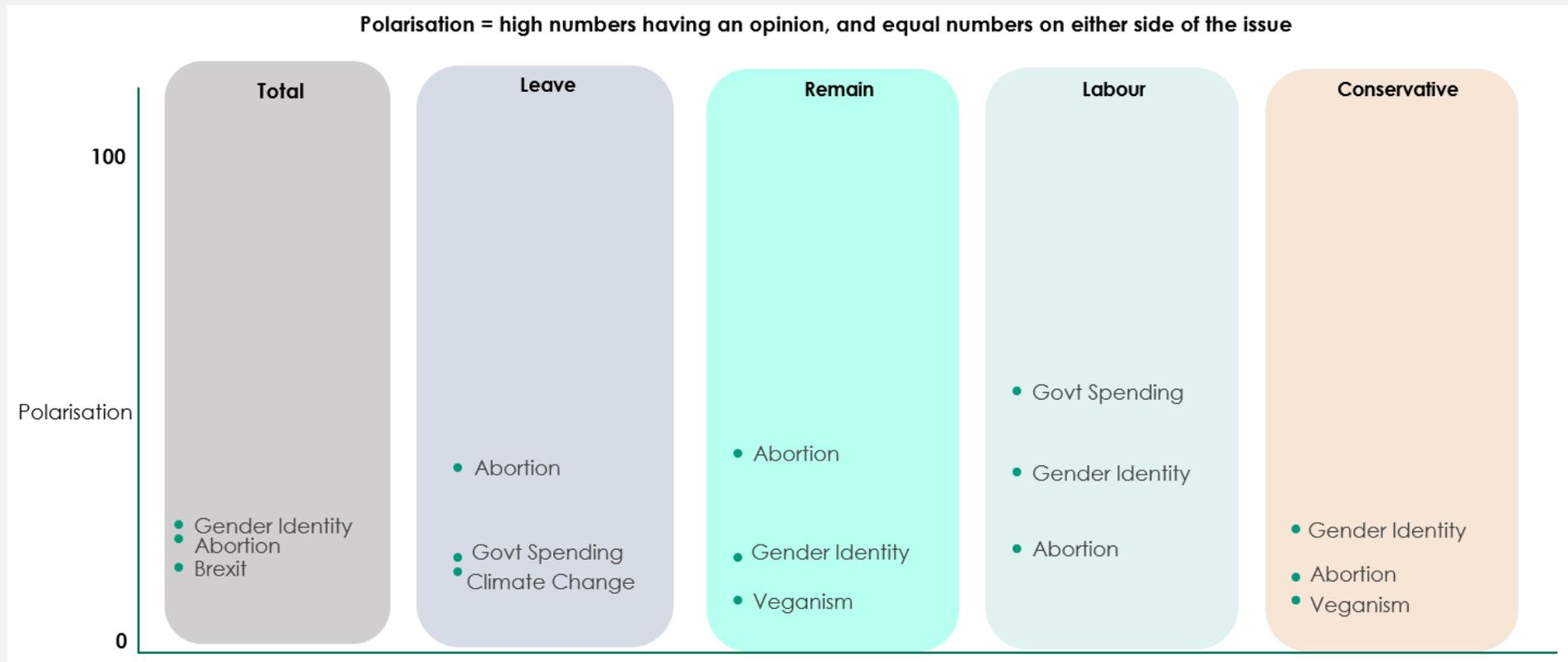
There is some consistency when the index is cut by income, with Brexit, Gender Identity, Abortion and Taxation all appearing in more than one band and not always at either end of the spectrum. However, poverty may be a strong cause for those brands appealing to consumers on lower incomes – this will polarise opinion between higher and lower bands. There is some degree of overlap in relative values in the first three income bands, but those on over £62k feel differently about almost every social issue. Poverty, for example, is a divisive issue for this group, and Gender Identity and Veganism go from being balanced concerns to being negative.

The Polarisation Index: Gender



Gillette's The Best a Man Can Be campaign, which takes on gender stereotypes, toxic masculinity and gender identity in the post-MeToo era appears to be well pitched to modern men – Gender Identity is a polarising issue (29% of men say this issue would make them feel worse about a brands, compared to 23% who would feel more positively). However, this is not as polarising an issue as Brexit, Abortion or Taxation, which are all more contentious, salient and finely balanced concerns. Polarisation among women is far lower: the only net-negative issue is veganism. On all other issues, more say it would make them feel more postively about that brand than negatively.

The Polarisation Index: Voting Intention and Brexit Vote



Unsurprisingly, voting intention and Brexit vote reveal higher levels of polarisation than some demographic cuts and a wide range of issues overall. Perhaps more surprisingly, Brexit is not the highly polarising issue we might expect, scoring relatively lowly among leave and remain voters or Labour/Conservative supporters. This is testament to the broader role that one issue has had in shaping issue polarisation: Government Spending, Climate Change, Gender Identity and Veganism all appear on one side of the Leave/Remain or Conservative/Labour divide, but not the other. The message for brands is that there may be limited value in the Brexit debate – but the Brexit divisions still yield varied views.

The New Rules

A landscape in which the social media team of a household product has to fear being tagged in a photo with a government minister is a new one. This landscape has new rules, and, as our Polarisation Index shows, highly divergent issues at play.

Lean in

Brands must be bold enough to have a voice in this landscape. The risk is that those that avoid political or social issues get found by them anyway – whether through being in a jurisdiction where the law is changing ([as with Netflix](#)), through association (as with Yorkshire Tea) or through complacency ([as with Paperchase or Pizza Hut](#))

Consider your audience

Not every issue is perfect for your brand or business and the right choice should be informed by an understanding of your customers. Know your audience – or your potential audience – and pick the right message for them. Emboldening them while alienating others is high risk, but also high reward

Be authentic

Do you deserve to have a voice on this issue? Consumers are adept at spotting fake sincerity and fake authenticity – Nike's Colin Kaepernick or Raheem Sterling campaign was the latest in decades of adverts supporting controversial or pioneering athletes. Where does your brand have existing credibility?

Tread carefully

The obvious targets are not necessarily the right ones. Those issues that will attract the most support will not necessarily be the ones that cut through and the most obvious issues for one demographic might not be the ones that will be most supported.



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