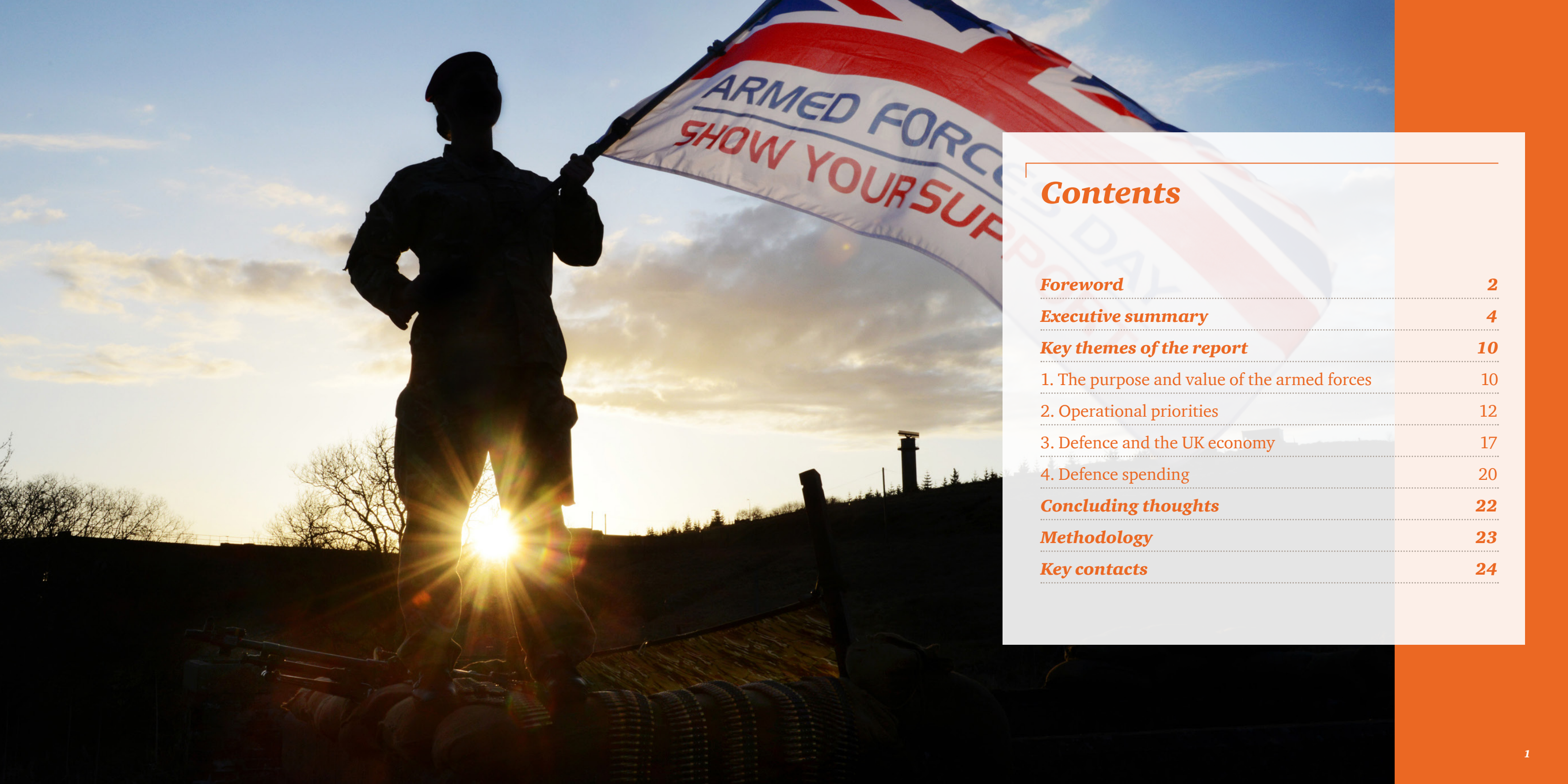


Forces for change 2017

Talking Points



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Foreword

Protecting and defending the British public are at the heart of the UK Armed Forces' role and purpose in society – and their relationship with the public is key to their ability to fulfil that purpose. It was to provide an ongoing barometer for this relationship that we launched the Forces for Change survey.

Now in its third year, this annual survey provides a snapshot of how the public perceives the UK's armed forces, their purpose, their value, and how trusted they are. The findings are important for several reasons, not least in helping to inform government spending decisions on the armed forces and attract new recruits by fostering a positive image of the forces and the career opportunities they offer.

The latest survey of over 2,000 members of the public captures the popular mood at a time when the threats we face as a society are continuing to grow. The study was conducted after the terrorist attack in Westminster but before the atrocities in London Bridge and Manchester. Not surprisingly, our research reveals rising public concern over risks such as the recent 'lone wolf' and terrorist attacks – and hence over the wider national defence and security agenda.

For the armed forces, the study presents several encouraging messages. For example, public trust in the services is high and rising, and people want to see the UK's military strength increase. There's also widespread appreciation of the forces' contribution to UK society and value to the economy. Together, these findings point to a major opportunity – one that is all the more important as Brexit draws nearer: the potential for the UK to invest in building a world-class defence industry that will boost economic growth through exports and investment, in turn helping to drive jobs and skills.

However, our study also reveals some challenges to realising this opportunity. These include a relatively lower level of trust in the armed forces among younger people, together with a lack of awareness about the value they create. A particularly notable finding is that younger people are less aware than their older counterparts of the employment and training opportunities offered by the military.

In an era when military strength is determined more by capability and readiness than by headcount, and where a coherent industrial strategy is once again central to the government agenda, we believe the elements required to kick-start the UK's journey to a world-class defence industry are clear. What's needed is a holistic and credible measure of the various forms of value that the armed forces deliver to the UK, combined with a clearer sense of purpose among the services themselves, and open and engaging communication of that value and purpose to society as a whole.

We hope you find it absorbing and thought-provoking – and we look forward to hearing any comments or feedback you may have. Our team's contact details are at the back of the report.

Roland Sonnenberg

Lead Partner for Defence, PwC
June 2017



Executive summary

This report summarises the main findings of Forces for Change 2017. Looking across the results, five key themes emerge.

Stronger defence: the need to invest in capability

This year's study finds that 55% of the public would like to see British military strength increase in the coming two decades – a figure little changed from last year's Forces for Change. At the same time, the public expects the military to continue to play a wide range of roles alongside national defence, ranging from managing the impacts of natural disasters to supporting domestic security. Most people still see intervention in other countries as an important function of the armed forces, provided that these actions increase the security of the UK itself.

To fulfil all these roles, the UK's armed forces must be sufficiently strong and well-resourced to undertake a number of tasks concurrently. While this need may not always appear to sit comfortably with government spending constraints, it's important to grasp that what matters today is not the absolute size of defence, but its capability in terms of the right intelligence, skills, equipment and readiness. This is an important distinction, because the general public still tend to equate the strength of defence with numbers of personnel rather than capability. Yet satisfying their desire for a stronger military will be more a matter of building the right capabilities than increasing headcount.

That said, if the public really do want stronger armed forces, then they're going to have to be prepared to pay for them. This would mean increasing the proportion of GDP spent on defence above the 2% generally seen as the appropriate level for a developed economy. The Government's capacity to achieve this is directly linked to the proportion of government revenue or national spend that it is prepared to invest in defence. In Europe this generally stands at around 4.5% to 6%, compared to nearly 7% in Australia and some 15% in the US, Russia and Israel¹. It's also important to have a clear definition of what actually constitutes defence spending: including elements not directly linked to the armed forces to make spending appear higher is not necessarily helpful.

Our study shows that the public has little clue about how much money is spent on defence or how it's allocated. For them to have confidence that investment in stronger defence is going into the right areas, then greater clarity will be needed both on what it's being spent on, and also on how that investment contributes to the economy as a whole.

Defence and the economy: buying British must also mean buying the best

Zeroing in on this contribution, there's a clear opportunity for the government to use defence spending to support jobs, innovation and investment in UK industry. This is an opportunity that the public feels the government should take, with 46% of respondents saying the government should support UK industry through its defence spending. This compares with 38% who think it should seek the best price irrespective of whether the equipment is being sourced from the UK or overseas.

Given the long lifecycle of R&D and technology development in the defence sector – often as long as 25 to 30 years – there's a strong argument for buying British to support future innovation and skills, rather than sourcing readily-available equipment off-the-shelf from suppliers in markets such as the US. By taking this long-term view and approach to its defence spending, the UK MOD could support the UK's industrial strategy in a post-Brexit economy and help build a global Britain. However, the MOD can't achieve this on its own. UK industry also needs to step up to play its full part in delivering what the MOD and the nation need. In order to deliver best value to UK defence, industry needs to be sufficiently productive and efficient, as well as internationally competitive.

A further vital economic impact of the armed forces and defence industry is their own contribution of skills to the UK. While the public are aware of this contribution – with 81% in our study highlighting the armed forces' significant role in providing jobs and employment, and 82% in delivering training and upskilling – the level of awareness falls off badly among younger respondents. These are the very people who should be looking to benefit from the resulting opportunities, and whom the armed forces need to attract. So this knowledge gap needs to be addressed.

Skills developed by the military add value to the UK economy in two key ways. The first is when people with training and experience gained in the armed forces leave for civilian roles, bringing with them a strong skillset and work ethic. The second is the military's development of deep specialist technical skills in areas like nuclear and aeronautical engineering, which are hugely valuable in the civilian sector. To make the most of these skills on both sides, there's a clear opportunity for more partnerships and collaboration between the armed forces and industry.

¹ <http://data.worldbank.org/indicator/MS.MIL.XPND.ZS>

**How defence is valued:
seeking a new basis for
measuring the return on
investment**

As our research underlines, the public still see the armed forces as one of Britain's most trusted institutions, with the UK military's trustworthy score rising in the past year to 70%. But our study also confirms that people find it very hard to assess what return the nation gets on its investment in defence. We think there is a much larger upside to defence spending than current perceptions – or the narrow measure of defence spending with UK industry – would seem to indicate. If the armed forces' contribution in areas like skills, jobs, innovation and local communities

in taken into account, every £1 of military spending could be worth significantly more to the UK economy. However, none of the single services – or the defence sector in general – has calculated a robust, rigorous measure of its own value creation for UK society. In our view, such a measure of value is urgently needed. Indeed, we think its creation would be transformational, by providing – for the first time – a robust and irrefutable basis for arguing why investment in defence is in the national interest from an economic and social as well as security standpoint.

**Jobs and skills: developing
and nurturing young talent
for UK plc**

Aside from reinforcing the case for investing in the armed forces, a clear assessment of the value they bring to UK society would also help the forces themselves gain a clearer sense of their own purpose and value, and communicate these more effectively. The fact is that the armed forces are a valuable training and development ground not just for the military and defence sector, but for UK plc as a whole. So we believe the forces should focus on – and emphasise – their role as a national skills developer even more strongly, while also devoting more attention to how they treat their people in terms of wages, housing and other employment conditions.

In an era when the talk in the media is of zero hours contracts and 'generation

rent', the armed forces can offer young people the solidity of secure employment that provides relevant, life-long skills. Given this, we think the armed forces – and the defence sector that supports and equips them – should talk more about the value of their human capital development, and use independent evidence to back up what they say. It's ironic that our research shows the young have a less positive view than older people of the armed forces, including around their role in employment and skills. For young people – and society as a whole – to reap the full benefits from the armed forces, the upcoming generation need to be aware of what they have to offer, and feel encouraged and inspired to take advantage of it.

**Communication: getting
messages across in more
professional and targeted
ways**

In tandem with maximising and highlighting the value of their people development, the armed forces also need to communicate more effectively with society as a whole about all the forms of value they create. Again, this imperative comes across strongly in our study, not least in the information gap among younger people. With the proportion of people with direct links to the armed services in long-term decline, the forces need to raise their game across the whole spectrum of communications, becoming more professionalised in their approach and focusing on different demographics and sections of society.

There are a number of elements to this. One is smarter and more professional use of social media, both around the messages themselves and how they're communicated, by using the technology more effectively to reach and engage different segments of the population in different ways. In

all too many cases, military leaders' current followers on social media are other people in the forces. To have real influence, the reach needs to be more diverse. Another aspect is creating advocates for the armed forces among former members. This means ensuring that people who join the services at an early age and then take their skills out into society are encouraged to act as ambassadors for military careers, emphasising the life-long nature of the resulting benefits both within and beyond the military.

The armed forces deliver a tremendous amount of value to the UK. This latest Forces for Change report underlines the need both to measure that value more clearly – and also to communicate it more effectively to the people who most need to know about it: the younger generation.



An agenda for action

As in previous years, our 2017 survey has enabled us to identify several steps that could help to sustain and grow trust in the armed forces – and to increase public awareness of their vital role and contribution to the economy and society of the UK.

Improve the public understanding of what the armed forces do

While most people trust the armed forces, our survey shows the public have very little awareness of how much the government spends on defence or what our armed forces do with it. So there's a pressing need to provide the public with a greater understanding of the what the military do on their behalf, and of the resulting benefits to UK citizens, the economy and society as a whole.

Be transparent about the capability UK defence requires

Our study confirms that the public want to see the UK's armed forces undertake a wide range of roles. To meet this aspiration, the forces must have sufficient resources and capability to undertake several tasks at once. This will require higher defence spending – and it is vital that both the military and government are open and honest in explaining why this is the case.

Support UK industry by buying British

In last year's study, we stressed that the industrial strategy must have a strong people and skills dimension to help drive a high-skilled economy. This year's findings expand on this point, highlighting the public's desire to see UK defence spending support UK jobs and skills by sourcing from British suppliers where possible. But government can't deliver this alone: industry must also be productive and efficient enough to ensure buying British also means buying the best.

Measure the value of defence to the UK as a whole

The public find it very hard to see what value the UK gets back from its spending on defence. Yet the forces' contribution in areas like skills, jobs, innovation and local communities means the value returned to society probably far outweighs the original investment, even before the military's traditional role of defending the realm is considered. What's needed is a robust, rigorous measure of the armed forces' value creation for the UK as a whole, showing how investment in defence creates many forms of value for the nation.

Demonstrate how UK defence values its human capital and diversity of background

Amid today's talk of zero hours contracts and 'generation rent', the armed forces offer people from all parts of society unsurpassed opportunities to find secure employment and gain valuable life-long skills. To highlight this role, the military and defence sector should make efforts to demonstrate more clearly to the public how they value and develop human capital, drawing on real-life stories and independent evidence.

Become more innovative and professional in communicating with all sections of the public

Younger members of the public voice lower levels of trust in the armed forces, and have less awareness both of what they do and of the opportunities they offer in terms of employment and skills. To close this information gap, the armed forces need to communicate with a wider range demographic groups in smarter and more targeted ways – including via social media – and create advocates among those who leave the forces and take their skills out into society.



Key findings of the report

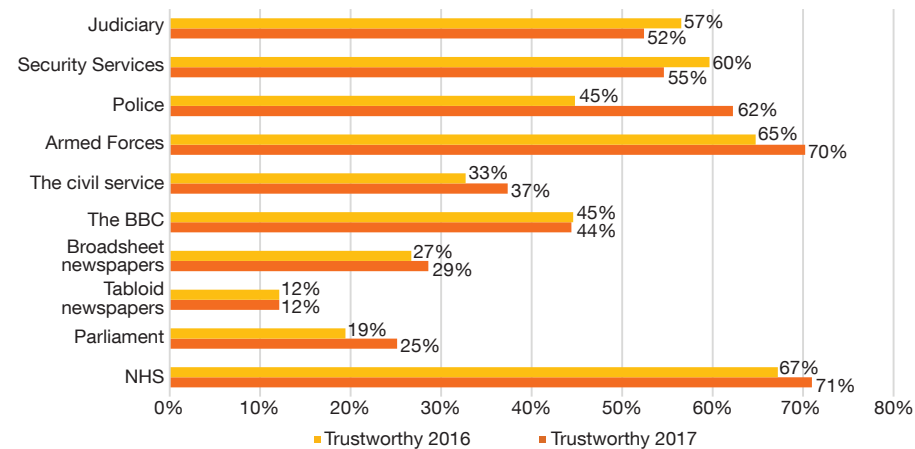
The purpose & value of the armed forces

Our findings on the public's perceptions of the armed forces confirm that they remain among the most trusted of British institutions. The majority of respondents have a positive view of the armed forces, and see their most important role as being to defend the UK from external threats and attacks. Yet the degree to which people trust the armed forces tends to vary with age – with older people generally expressing the highest levels of trust, and younger people the lowest.

Trust has risen overall...

There has been a notable rise in overall public trust in the armed forces in the past year, with their 'trustworthy score' increasing from 65% in our 2016 study to 70% this year. Trust in the police has also risen strongly, although this increase may have been influenced by the timing of the polling, which took place in the week following the terrorist attack in Westminster. Trust in Parliament may also have benefited from this effect. Like last year, the findings ranked the armed forces and NHS as the two British institutions most trusted by the public.

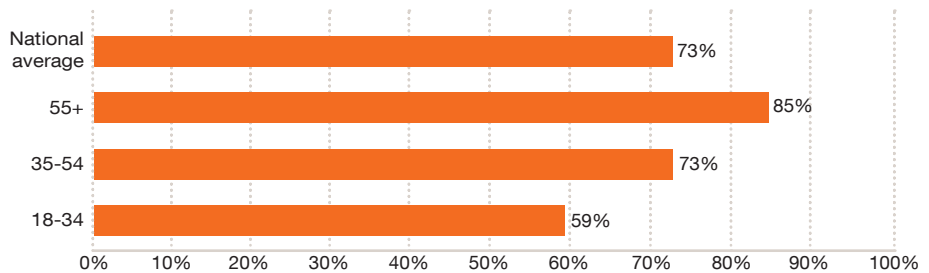
Figure 1: Rate the following British institutions in terms of how much you trust them?



...but the young remain unconvinced

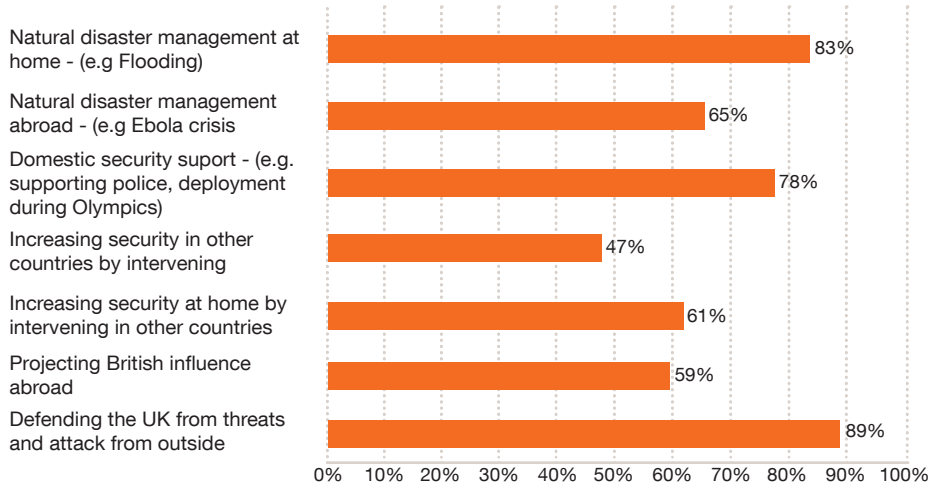
However, while trust in the armed forces has risen overall, perceptions vary between different age groups. In general, older people are overwhelmingly positive about the armed forces, with 85% of people aged 55 and over professing themselves to be positive against just 5% who are negative. Younger people – while still positive – are more restrained, with 59% of 18-34 year olds saying they're positive, while 13% are negative. This generation gap marks a continuation of a trend highlighted by our research in each of the past two years.

Figure 2: How would you describe your feelings towards the British armed forces?
Positive or very positive



This variation is worrying for future recruitment, since the younger demographics who make up the armed forces' main recruitment pool are those who have the least positive view of them.

Figure 3: Below is a list of the various functions that the armed forces fulfil. Please tell us how important you think each function is.



Defending the realm is the most highly-valued role

Turning to the role and purpose of the UK armed forces, and the main types of value that they deliver to the nation, the public regard all functions that they play as important. However, unsurprisingly they put defending the UK from threats and attacks from outside top of the list, ahead of managing natural disasters such as floods and supporting domestic security. Intervening in other countries also ranks relatively high among the public's priorities for the armed forces, provided that this serves to increase security at home – underlining that being able to intervene overseas is an essential capability required to defend the realm.

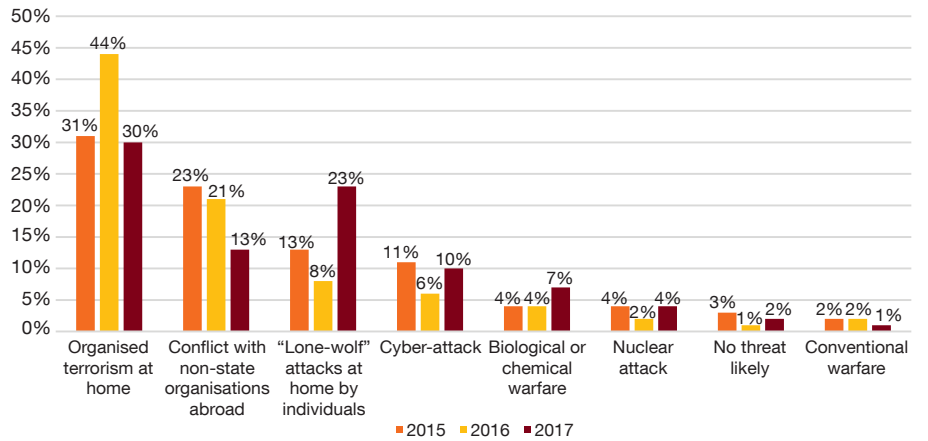
Operational priorities

On operational issues such as threat levels, strategic alliances and military strength, our research reveals a significant increase in concern about lone-wolf attacks. There is also a perception that the UK’s military capability has grown weaker in the past 20 years, with the majority of respondents saying they would like to see it regain greater strength. NATO is seen as the UK’s most important strategic alliance, and the relationship with the US as the most important bilateral relationship. Support for the UK’s nuclear deterrent remains relatively high at 48%, compared to 17% opposed to it – figures that are roughly in line with previous years.

Rising worries over lone wolf attacks

Rising public concern about lone-wolf attacks sees the proportion citing this as the biggest threat leap from 8% to 25% from 8% in 2016 – an increase that may partly reflect the tragic events in Westminster shortly before polling.² Conversely, concern over organised terror at home has fallen back since last year, although it remains the highest-ranked threat. Among the lower-level risks, the perceived threat of cyber-attacks has risen by two-thirds and of biological warfare by three-quarters.

Figure 4: What type of attack do you perceive as the biggest threat to the UK in the near future?



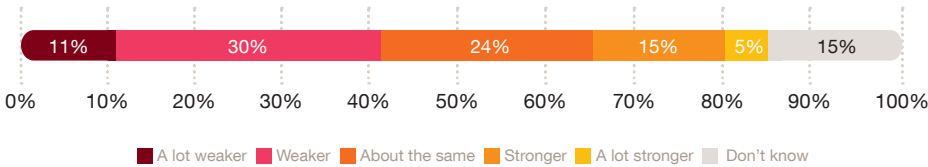
Taken together, these findings appear to suggest that people are generally most worried by the latest incidents. Our 2016 study was carried out shortly after the co-ordinated attacks in Brussels, which boosted concern over organised terrorism, while events this year have put lone wolf threats front-of-mind. Looking across our 2017 findings, it’s interesting to note that the perceived threat from cyber attacks had already increased over 2016 – even before the attack in May 2017 that impacted some parts of the NHS.

² Fieldwork was carried out between 4th and 6th April – after the attack on Westminster Bridge but before the Manchester and London Bridge attacks.

A desire to regain lost military strength

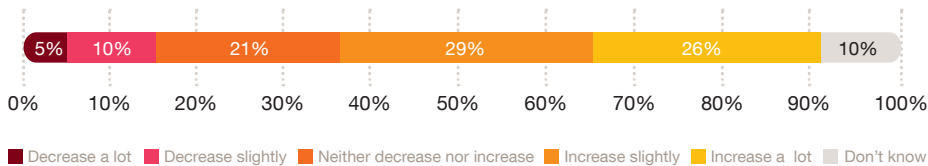
While the relative levels of concern over different threats continue to shift year on year, over half of the public – 51% – agree with the statement that ‘the British Armed Forces have made the UK a safer country compared to 20 years ago’, while only 11% disagree. Nevertheless, there’s a clear perception that the UK’s military capability has become weaker, with 41% of UK adults saying the British military has weakened in the past two decades, and just 20% believing it has become stronger. The view that the military is weaker than 20 years ago is highest among those in the 55+ age bracket, at 57%, and lowest among 18-34 year olds, at 19%.

Figure 5: Would you say that Britain’s military in 2017 is stronger, weaker or at about the same level of strength as it was 20 years ago...?



Looking forward over the next two decades, a majority of the public would like to see the UK military claim back at least some of the ground they feel it’s lost. A total of 55% of respondents say they would like to see Britain’s military strength increase over that timeframe, against just 15% who would like to see it decrease.

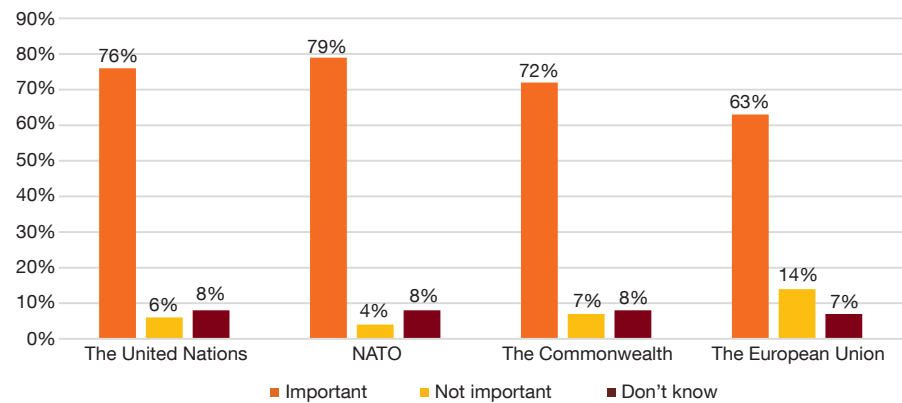
Figure 6: ...And thinking about the NEXT 20 years, would you like to see Britain’s military strength increase, decrease or stay the same?



Military relationships: NATO and the US are most important

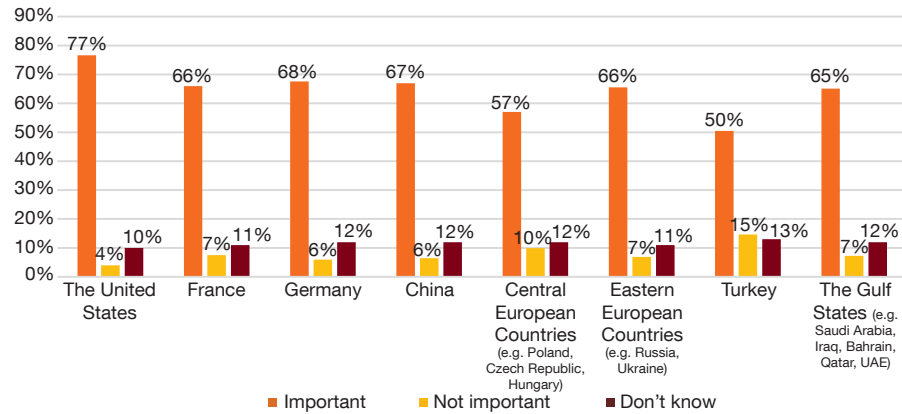
Asked to rate the relative importance to the UK's national security of a range of international alliances, our respondents rank NATO first with 79% of respondents considering this important or very important, followed by the United Nations on 76%.

Figure 7: How important do you think the UK's relationship is with the following international alliances to our national security?



In terms of the importance of the UK's bilateral relationships at a national level, the public rank the US top by a significant margin. The US is followed by a group of nations with very similar importance scores in the 65% to 67% range, including Germany, France, China, Eastern European nations (including Russia) and the Gulf states. Central European countries and Turkey lag some way behind.

Figure 8: How important do you think the UK's bilateral (or individual) relationships are with the following countries to our national security?



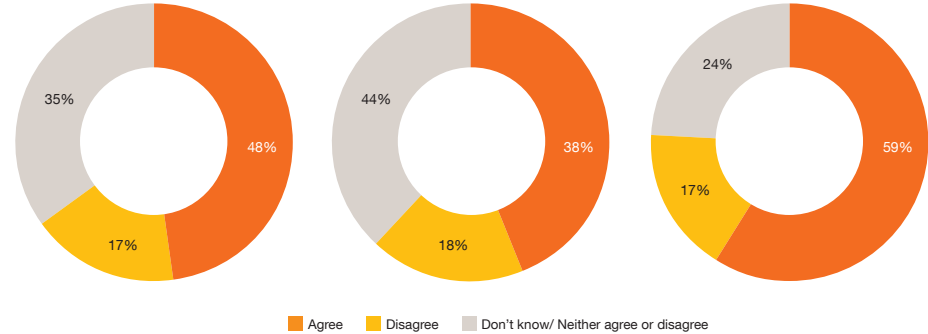
Support for the UK's nuclear deterrent remains strong...

On the issue of the UK's nuclear deterrent, public support for the UK maintaining its nuclear weapons capability remains relatively high, roughly in line with our studies in 2015 and 2016. Some 48% of all respondents agree that the nuclear deterrent contributes to the UK's safety and stability, little changed from 50% in 2016, with only 17% in 2017 disagreeing, down from 19% last year.

...but varies between women and men, young and old

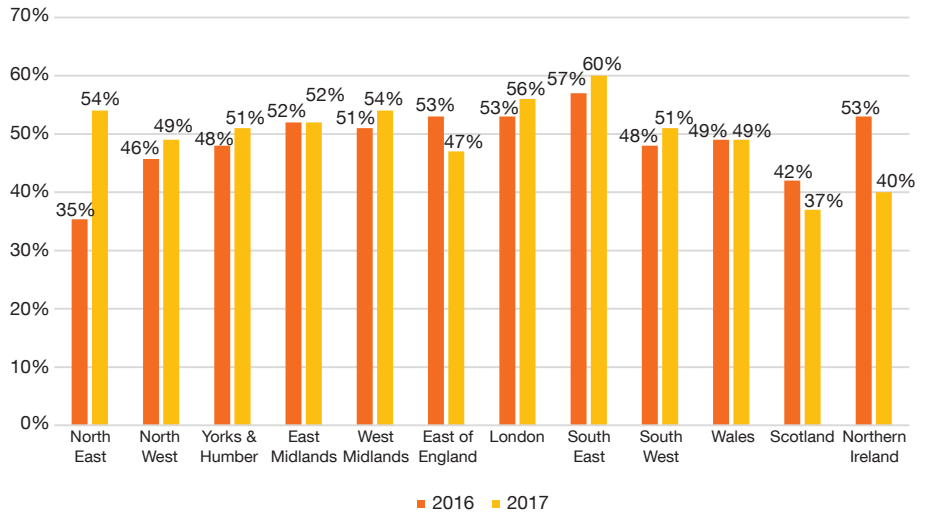
However – again like last year – over one-third of our respondents are undecided, and there are stark variations between the views of women and men. Only 38% of women agree that the nuclear deterrent benefits safety and stability for the UK, against 59% of men, and 44% of women are undecided, compared to just 24% of men. Younger UK adults are also less convinced that the nuclear deterrent contributes to the UK's safety and stability: 38% of 18-34 year olds agree that it does, compared to 47% of those aged between 35 and 54, and 58% of those aged 55 and over.

Figure 9: Do you agree or disagree with the idea that having a nuclear deterrent contributes to the UK's safety and stability?



When we asked the public whether they think the UK should remain a nuclear armed power for the next 20 years, similar patterns emerge, with 51% of respondents agreeing that Britain should remain a nuclear armed power compared to 17% who disagree. Again, women are less likely to agree than men – at 41% of women versus 62% for men – though disagreement levels are similar, at 18% and 15% respectively. There are also variations in terms of age, with only 41% of 18-to-34 year olds agreeing that the UK should remain a nuclear-armed power, rising to 50% of those aged 35 to 54 and 60% of those aged 55 or over. A regional analysis shows that support for retaining the UK's nuclear deterrent remains highest in the South East and London, and lowest in Scotland, where we have seen a decrease since last year.

Figure 10: Thinking about the next 20 years, do you agree or disagree that the UK should remain a nuclear armed power?



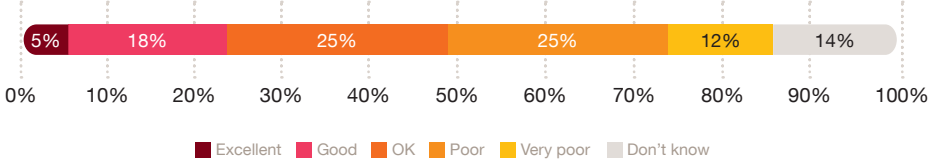
Defence and the UK economy

Asked to cite the most important ways in which defence contributes to the UK economy, our respondents point primarily to jobs and skills. While the public admit to relatively poor awareness of how the armed forces do contribute to the economy, they think the government has a responsibility to support British companies and industry through its defence spending, rather than buying the best equipment regardless of origin.

Economic impacts: little awareness beyond jobs and skills...

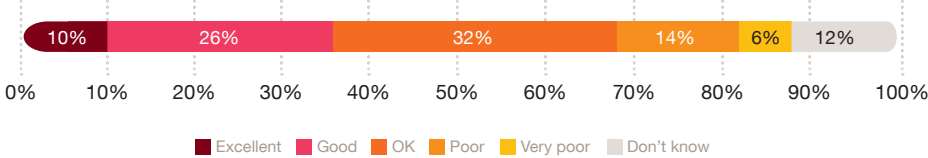
The respondents to our 2017 study say they have little awareness of how the armed forces contribute to the UK economy. Just 23% rate their own awareness of the armed forces' economic contribution as good or excellent, while 37% rate it as poor or very poor.

Figure 11: Please rate your own awareness of what the armed forces contribute to the economy



However, one area where the public feel they have reasonable level awareness is around the career and training opportunities available within the armed forces. Some 36% rate their awareness of these as good or excellent, against 20% who say their awareness is poor or very poor. This represents an improvement since last year, when the corresponding figures were 33% and 24% respectively.

Figure 12: Please rate your own awareness of career and training opportunities available within the armed forces



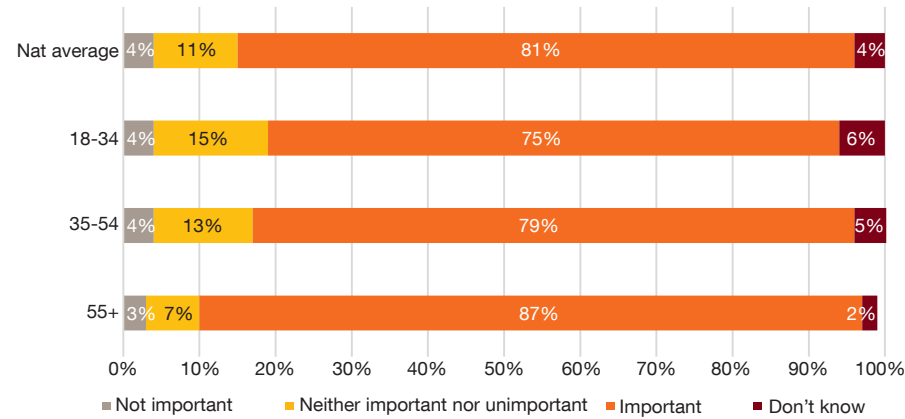
...with a worrying information gap among the young

Other findings underline that the public regard jobs and skills as the most important ways in which the armed forces contribute to society: for example, four in five (81%) overall say the armed forces have a significant role to play in offering jobs and employment opportunities, and 82% say the same about training and upskilling its people.

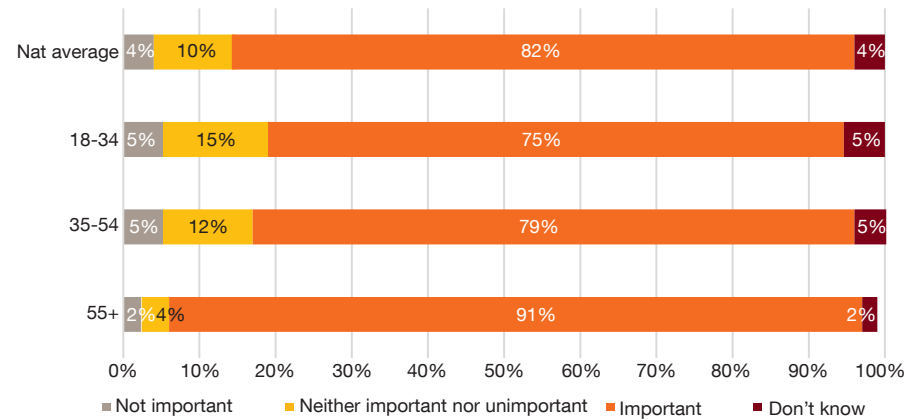
However there is considerable discrepancy in terms of age, with older people having a much more positive perception of the armed forces' economic contribution in these areas. Given that younger people could be the ones potentially receiving the jobs and skills on offer, this once again points to a worrying information gap – and a need for the government and armed forces to communicate more clearly about what defence contributes to the UK economy – especially to the young.

Figure 13: Please rate the importance of the UK armed forces' contribution to the following aspects of the economy

Offering jobs and employment opportunities



Upskilling and training members of the armed forces



A responsibility to buy British?

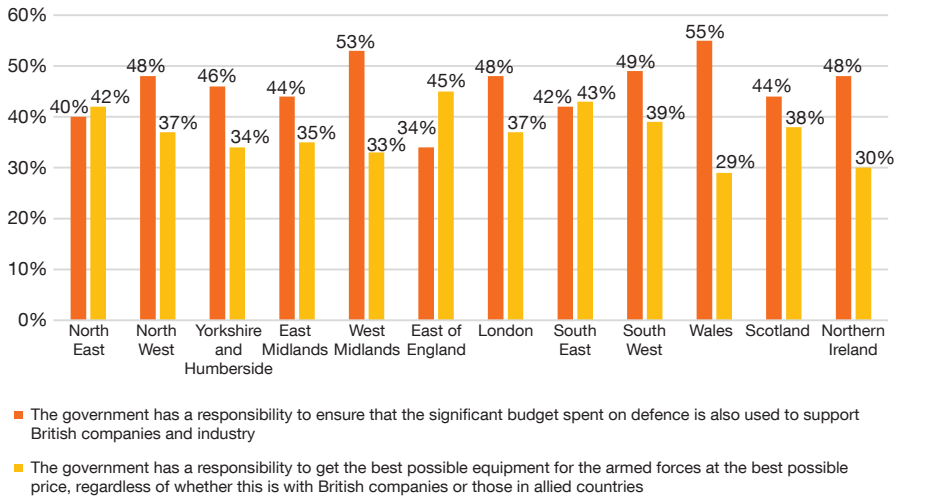
Regardless of public perceptions of the armed forces' contribution to the economy, more respondents think the government has a responsibility to support British companies and industry through its defence spending, than believe it should buy the best equipment regardless of where it's produced. Some 46% take the view that the government should support UK industry through defence spending, while 38% think it should seek the best price irrespective of origin.

However, the proportion taking this view varies widely between different regions of the UK. In some areas – the likes of the West Midlands, Wales and Northern Ireland – there is a strong majority in favour of supporting British industry through defence spending. In others, such as the East, South East and North East of England, more people would favour defence procurement being carried out on the basis of the best available price.

Figure 14: Thinking about the money the government spends on defence equipment and how that may interact with the rest of the UK economy, which of the statements below best describes your view?

The government has a responsibility to ensure that the significant budget spent on defence is also used to support British companies and industry	46%
The government has a responsibility to get the best possible equipment for the armed forces at the best possible price, regardless of whether this is with British companies or those in allied countries	38%
Don't know	17%

Figure 15: Thinking about the money the government spends on defence equipment and how that may interact with the rest of the UK economy, which of the statements below best describes your view?



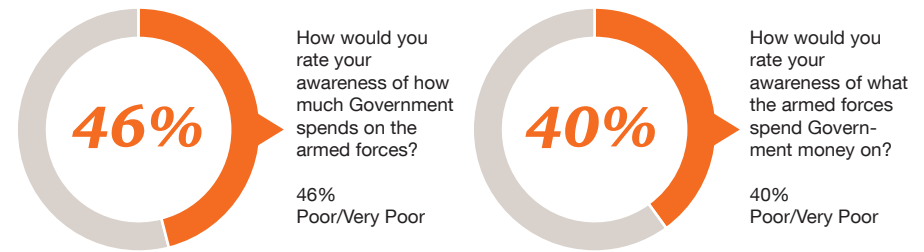
Defence spending

There is little awareness among the public of how much government money is spent on the armed forces, or of how the money allocated to the military is actually spent. However, the majority of our respondents say they would like to know more both about these facts.

Awareness of military spending is poor...

Asked to rate their own awareness of the scale of public spending on the military, only 17% of respondents say they have at least a good awareness of how much the government spends on the armed forces, with nearly a quarter (24%) saying their knowledge is ‘OK’ and 46% admitting it is poor. Similarly, only one-fifth (20%) say they have good awareness of how money is spent on the armed forces, while 40% rate their knowledge of this as poor. These proportions are largely in line with last year’s findings.

Figure 16: Please rate your own awareness of the following issues



In terms of what areas the public think should be in the top two priorities for defence spending, equipment such as tanks, ships and aircraft gets the biggest vote at 48%, while 30% put the pay and conditions of existing service personnel in their top two. The third most popular option is training for members of the armed forces, at 28%. The high costs of military vehicles such as ships, tanks and aircraft may have influenced our respondents’ selection of ‘equipment’ as the most popular option.

...but people would like more information

While there is clearly a public awareness and information gap around defence spending, it’s one that our respondents want to see filled. Most would like to know more about this subject, with 65% agreeing that ‘it is important that people like me understand what our armed forces do,’ and 54% agreeing that ‘I would like more information about how money is spent by the armed forces.’

These findings – again in line with last year – appear to point to a continued appetite for better information on what the forces do and particularly on how money allocated to defence is spent. It follows that the government and armed forces need to do more to explain how much they spend, and what on.

Human capital development is seen as a key return on defence investment

Other findings underline that the public regard jobs and skills as the most important ways in which the armed forces contribute to society. As we’ve already stated, over four in five overall say the armed forces have a significant role to play both in providing employment and upskilling the UK’s talent base. And while only 23% rate their own awareness of the armed forces’ economic contribution as good or excellent, 36% say they have good or excellent awareness of the career and training opportunities on offer within the military.

What’s clear is that the armed forces are perceived – quite rightly – as a key provider and developer of skills for the UK as a whole, and that this is an important aspect of the returns generated from spending on defence. Going forward, we believe this positive perception should be reinforced and justified through more explicit measurement and communication of how defence spending helps to develop and grow the UK’s human capital. This communication should be focused particularly on younger people, who stand to benefit most from upskilling and career opportunities that the armed forces can provide.

Concluding thoughts



Our study makes it clear that people want to know more about the UK armed forces – including how much is spent on them, how they spend that money, and what value the UK gets back in return. This means that in seeking to communicate and engage more widely, the services are pushing against an open door.

The first step towards opening this door is for the armed forces themselves to gain greater clarity on the value they create, their own purpose in society, and how they'll communicate this purpose and value to different segments of the population. As we've stressed in this report, reaching out to the young will be especially vital, given that they are less convinced of the armed forces' contribution to society – yet represent the future both of the services and the wider UK skills base.

In our view, this report amounts to call to action for the UK armed forces to raise its game in defining and communicating the value they create. Our respondents want a stronger military. But for the UK government and public to be prepared to invest in the capability needed to achieve this, they'll need a deeper and more detailed understanding of the overall value that the armed forces generate for the country. It's time to build that understanding.

Methodology

This 2017 Forces for Change survey is based on an online survey of a sample of 2,005 UK adults aged 18+. The research was carried out for PwC by Opinium Research between 4th and 6th April 2017, based on a survey sample weighted to reflect a nationally representative audience.



This was the third time we have conducted the annual Forces for Change survey. To create comparable data to the previous surveys in 2015 and 2016, we kept many of the questions the same, while also adding a number of new one to explore new areas.

As in previous years, the purpose of the research was to gain a better understanding of the public's views of the armed forces and some of the underlying reasons for those views. For example, do they trust the armed forces? Do they feel more at threat than before – and what from? Do they think the

military has increased or decreased in its size and scope? Should it grow or shrink further in the future? We also aimed to gain a better understanding of public perceptions of the purpose and value of the armed forces, specifically around their non-military roles, including contribution to the economy.

To provide insights into how views and attitudes towards the forces vary between different subsets of the population, the results were analysed by age, gender, region, ethnic background and socio-economic grouping.

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