

POLITICS, PUBLIC SERVICES AND SOCIETY:

CONTEXT FOR THE GENERAL ELECTION 2010



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INTRODUCTION

At this stage in 2010, all eyes are on the upcoming election, which our latest polls suggest is getting tighter. So this seems an opportune moment to take stock of the state of public opinion, as voters face a decision that will set the direction of the economy, public spending and the shape of many public services, possibly for years to come.

So, on the eve of a general election campaign, we offer this review partly as a synthesis of our work on the major issues of the last year, partly as an interpretation of what seem to be the crucial dynamics for 2010. We've grouped these into three big themes: Politics, Public Services and Society.

In Politics we explore the ups and downs of support for the main parties, and what this may mean for the coming election. We look particularly at what role the economic crisis may play; the chart below shows it is still seen as by far the most important issue facing the country. Drawing on our long heritage of political polling we also compare now with other pre-election years and discuss how the expenses scandal has impacted on public trust in politicians and the political system.

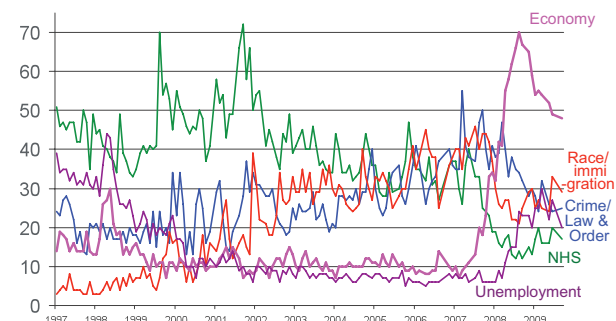
In Public Services we explore what the public expect of services, how satisfied they are and where they think cuts could be made, if anywhere. Finally, in Society we explore the potential wider impacts of the economic crisis – what it means for social mobility, the environment and business. We also look at how new technology may be changing the way public services are delivered, but is also creating a digital divide.

At the end of 2009, most people's money would have been on a Conservative victory. In our summer 2009 survey of MPs, even the majority of Labour MPs expected the Conservatives to emerge as the largest party after the election, and their average prediction was for a Tory overall majority of 7 seats. The Tories themselves were slightly more bullish, though not exactly over-confident, predicting on average a modest working majority of 41 seats.

Now, however, in March 2010, a whole series of polls are suggesting a hung parliament is still a possibility (though evidence that the Tories are performing better in the marginals still puts them in the driving seat). But whichever party wins, it is certain that the economic crisis will dictate a tightening of belts, and significantly lower public spending at some point soon. At the minimum public services will have to significantly adapt, and there is a good chance that many will need to be radically reshaped – but this may not be a bad thing; in the well-worn words of various US Democrats, we should never waste a good crisis.

ISSUES FACING BRITAIN: LONG TERM TRENDS

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

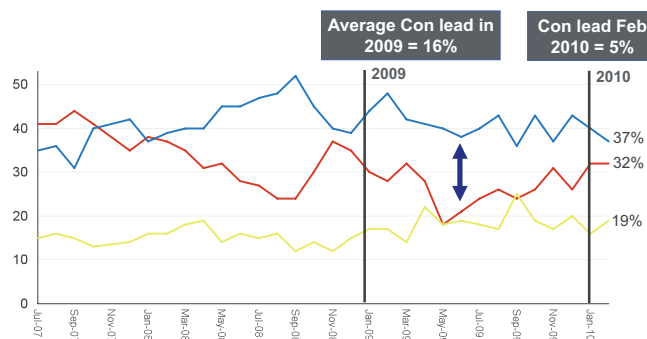


Base: Base: representative sample of c.1,000 British adults age 18+ each month, interviewed face-to-face in home

Source: Ipsos MORI

TWO YEARS OF TORY LEADS

Q. How would you vote if there were a General Election tomorrow?



Base: c. 1,000 British adults each month through June 2008; c. 500 British adults thereafter

Source: Ipsos MORI Political Monitor

Bobby Duffy

Managing Director,
Ipsos MORI Social Research Institute

1. THE POLITICAL SCENE – ELECTION AND THE ECONOMY

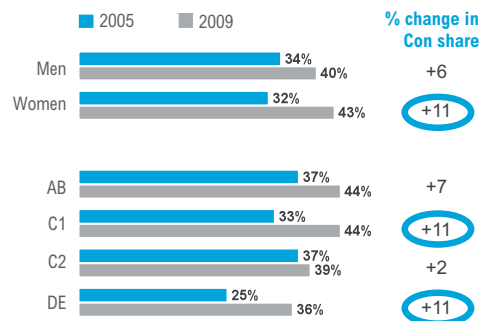
- › Politics – an overview
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POLITICS – AN OVERVIEW

Throughout 2009 the Conservatives led in the opinion polls and they take this forward into 2010. An average of all our polls across 2009 shows the Conservatives on 42%, Labour on 26%, the Lib Dems on 19%, while all other parties combined account for 13%. However, most polls in February 2010 show the gap between Labour and the Tories tightening (to a five-point Conservative lead in our last poll of February)¹.

CONSERVATIVE VOTE SHARE: GENDER AND SOCIAL GRADE



Base: 2009: 12,076 adults aged 18+ in Britain, Jan-Dec 2009. 2005: MORI Election Aggregate based on 15,948 interviews

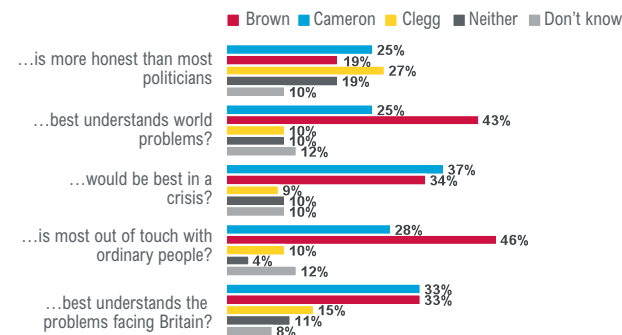
Source: Ipsos MORI Political Monitor

This though still represents a clear gain for the Conservatives on 2005 when, under the leadership of Michael Howard, they took 33% of the vote. However, this gain in support has not been an even one. In fact, the Tories have gained most among their weakest groups and in their weakest areas. Not only have they reverted to their historic habit of having marginally higher support among women than among men, a pattern that disappeared while Tony Blair was Prime Minister, but they have also gained dramatically among DEs (the lowest social classes), as the chart shows, and among 25-44 year olds (where their support now stands at 41%, compared to 26% in 2005).²

What is behind the swing of public opinion that has put the Tories ahead at the start of the year? Conventional wisdom as conveyed by many of Fleet Street's columnists is to attribute it entirely to distrust, dislike of and even contempt for the Prime Minister. There is certainly some truth to this, with David Cameron's personal satisfaction ratings much higher than Gordon Brown's. Yet what of Cameron's failure to achieve a convincing lead over Gordon Brown on many of the key leadership indicators which have proved closely linked to voting in the past? Even from the

COMPARING LEADERS

Q. Which leader do you think ... Gordon Brown, David Cameron or Nick Clegg?



Base: 1,003 British adults 18+, 25th-27th September 2009

Source: Ipsos MORI Political Monitor

bottom of the voting intention trough, we found at the time of last year's party conferences that Gordon Brown still stood level with David Cameron as the leader who "best understands the problems facing Britain" and was only just behind on being "best in a crisis" – the two qualities the public judged most important in deciding between leaders when we asked them at the time of the 2001 election. Cameron has certainly overhauled a substantial Brown lead since the start of 2008 on being best in a crisis (at that point Brown led by 45% to 27%), but made less progress on being seen as the best at understanding the country's problems (a 6-point Brown lead then, level-pegging by September).³ Nevertheless, where the commentators are right is that this is more a failure of Cameron to convince the waverers rather than residual respect for the Prime Minister, whose satisfaction ratings have hung constantly around the 30% level over recent months.

Brown does lead convincingly on having the best understanding of world problems; but the Cameron lead is clear on the most emotive measure, who is "most in touch with ordinary people".⁴ The importance of being seen as "in touch" may arguably prove more important in 2010 than in previous election campaigns, with forthcoming televised debates offering more opportunities than ever before for voters to judge leaders on these types of 'softer' personal characteristics.

But though the jury may still be out on the leadership qualities that will win the election, the public seem, if unconvinced, at least prepared to give the Tories their chance, and 50% now agree that "the Conservatives are ready to form the next government".⁵

ECONOMIC POLICIES AND THE ELECTION

The economic crisis, and politicians' response to it, remains the top concern in the public's mind, despite the British economy's faltering steps back towards growth in the last quarter of 2009. In September 2009, the economy was the most-mentioned issue in helping people decide how to vote, and was cited by double the number of people than traditional vote-winners through the '90s such as healthcare and education.

However, with the general election likely in May, a lot can change, and it is still unclear exactly what impact the economy will have on people's voting intentions. For any issue to have a significant impact on voting, it has to pass several tests. It is not enough that the voters should think the issue is important – they must also see a difference between the policies or competence of the competing parties and believe that difference will translate into a genuine difference in performance between alternative governments. At the moment, none of the parties seem to have that sort of advantage on the economy.

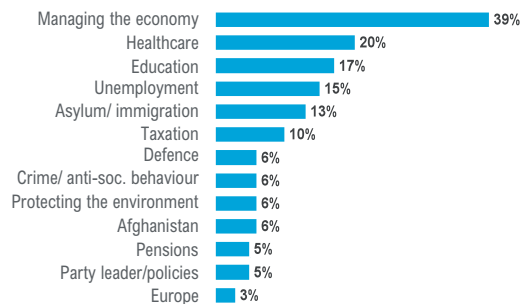
Gordon Brown entered 2009 well placed on this issue. Despite his already low satisfaction ratings, many more of the public picked Brown as the leader they most trusted to get Britain out of its economic problems than picked Cameron or Clegg. As many of the public felt Brown had thus far done a good job of handling the global economic crisis as thought he had done a bad job (45% on each side)⁶.

On the less personalised question of which party had the best policies for managing the economy, Labour and the Conservatives are neck and neck, and that was still the position in September. This is a substantial recovery for the government from the lead that the Tories briefly held in mid 2008 (when they were preferred by 37% to 21%), but is still in deep contrast to Labour's comfortable leads at the time of the 2001 and 2005 elections – when, of course, Gordon Brown was the Chancellor.⁷

This stalemate – and the fact that as the chart overleaf shows, confidence in the government's economic policies has shown some signs of picking up in recent months – suggests that there is plenty for both parties still to play for on this issue between now and the election.

MOST IMPORTANT ELECTION ISSUES

Q. Looking ahead of the next General Election, which, if any, of these issues do you think will be very important to you in helping you decide which party to vote for?

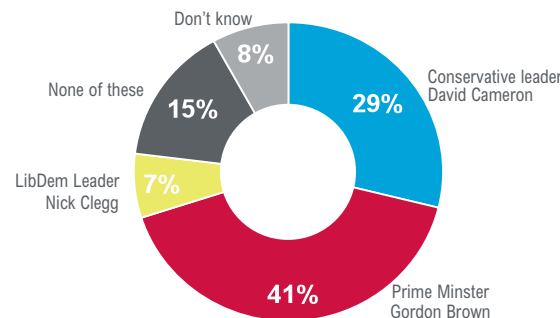


Base: 1,003 British adults 18+, 25th-27th September 2009

Source: Ipsos MORI Political Monitor

AT THE BEGINNING OF 2009...

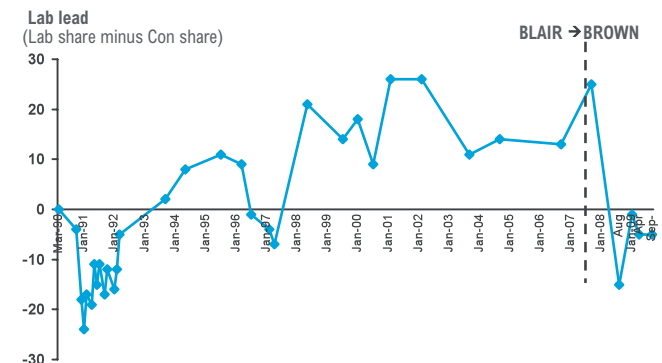
Q. Who do you trust most to get Britain out of its economic problems in 2009?



Base: 1,007 British adults 18+, 10-11 December 2008

Source: Ipsos MORI / Daily Mirror

BEST PARTY ON MANAGING THE ECONOMY



Base: c. 1,000 British adults each month
Note: Data collected prior to May 2008 was collected via face-to-face methodology; data collected from June 2008 was via telephone

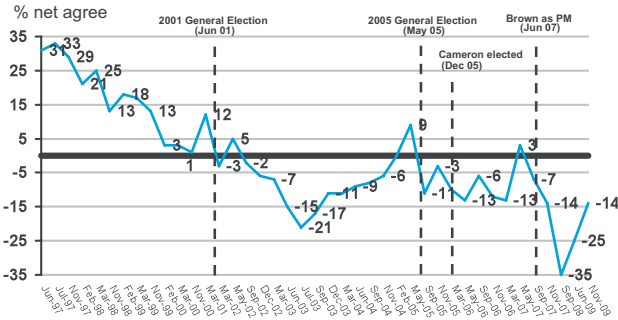
Source: Ipsos MORI Political Monitor

CONT... ECONOMIC POLICIES AND THE ELECTION

However, when asked explicitly which party is most trusted to spend public money wisely and efficiently, the Conservatives do have a lead. Two in four (39%) say a Conservative government would get the best value from the public money it spends, against 32% who think Labour would be most effective. However, while this is a complete turnaround from 2005, when Labour was clearly ahead, the Conservative lead over Labour fell from 15 to seven points between June and November 2009, which suggests that this could be another interesting issue to keep an eye on as the election gets closer.

CONFIDENCE IN GOVERNMENT'S ECONOMIC POLICIES HAS FALLEN...

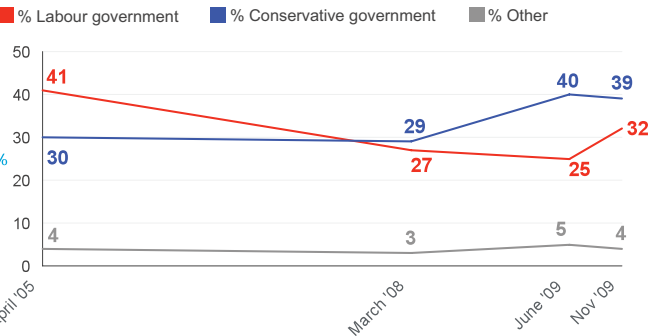
Q. Do you agree or disagree... "In the long term, this government's policies will improve the state of Britain's economy"



Base: c. 1,000 British Adults Source: Ipsos MORI Public Spending Index

...AND WHILE CONSERVATIVES ARE SEEN AS BETTER AT GETTING VALUE FOR PUBLIC MONEY, THE GAP HAS NARROWED SINCE JUNE

Q. Do you think a Labour or Conservative government would be most effective in getting good value for the public money it spends?



Base: c.1,000 British Adults Source: Ipsos MORI

ECONOMY AND WELL BEING

The public certainly doesn't underestimate the severity of the recession; it has had a direct impact on the lives of many, and most people think it will last at least for another two years. At the same time, though, the public does feel that we are now past the worst.

In fact, the public's economic optimism rose almost throughout 2009 to historically high levels, comparable to the previous peaks in the trend we have been measuring since 1979. In November, 46% of the public thought that the state of the economy would improve over the next 12 months while 23% thought it would get worse, giving a net score of +23, its highest level since 1997.⁸ (Of course, it is worth bearing in mind that this just reflects that people think the economy will get better – not that they feel the boom years are back.)

But in December, the number of optimists was down to 32% and pessimists up to 36%, for a -4 net score. Will this prove to be a lasting downturn in sentiment or only a temporary blip after a sobering Pre-Budget Report? The answer may well have

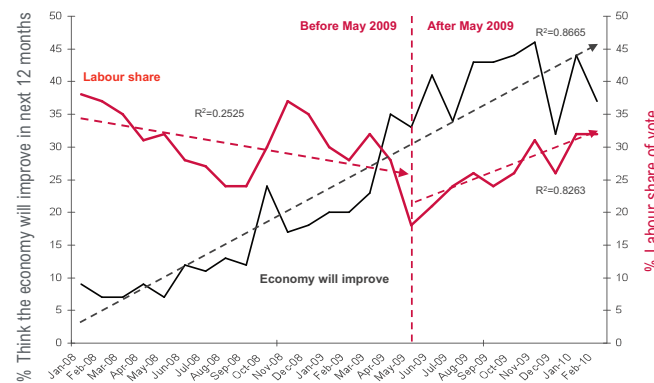
a direct impact on the election – it is a very different position when the public believes that recovery is underway, so that their main concern is that the new government should not jeopardise it. Economic optimism has recovered slightly at the beginning of 2010, but not consistently so. And, in January this year, despite the news that Britain's GDP had seen some (very minimal) growth in the last quarter, the vast majority 77% still felt that the recession wasn't over yet.

Having said that, Labour does not appear to have benefited from the upsurge of public optimism about the economy during recent months; in fact, there is no correlation between Labour's share of the vote and economic optimism. Indeed, they almost seemed to be on opposite tracks, although our most recent data does suggest that Labour might finally be seeing some benefit. The extent to which this trend does or does not continue may well be one of the best predictors of the upcoming election.

The recession has clearly moved from being a credit crunch mostly affecting the financial sector to having a significant impact on the real economy. As we have already seen, both the economy in general and unemployment in particular have been high on the public's list of urgent concerns throughout 2009. In April, more than a third worried at least "a fair amount" about themselves or a member of their family becoming unemployed.

Also by April, three adults in five said they personally knew somebody who had been made redundant in the previous six months, and 85% judged the current state of the British economy to be "fairly poor" or "very poor".⁹ Yet in the same poll, 68% predicted it would be very or fairly good in five years' time, a conclusion at odds with the history of previous recent recessions in Britain. (In the recessions starting in 1980 and in 1990, it took between eight and ten years for employment to return to its pre-recession levels.)

IS LABOUR BENEFITING FROM RISING ECONOMIC OPTIMISM?



Base: c.1,000 British adults each month

Source: Ipsos MORI

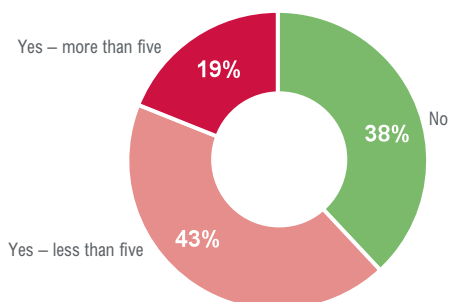
CONT... ECONOMY AND WELL BEING

The recession also appears to be having an impact upon family life; an Ipsos MORI survey in January for Policy Exchange found “financial pressures” by far the most frequently cited choice as the “greatest issue when trying to balance home and work life” – it was chosen by 44% of the public, compared to only 17% who said “not able to get enough time to spend with my children” or 10% “finding appropriate childcare”, the next most frequently cited issues¹⁰. Similarly, our research in February for the Government Equalities Office¹¹ showed that 75% felt concerned about the impact of the downturn on their family life, although more than half (56%) said that their family life had not yet been affected.

The public's economic optimism has had a fair record as a predictor of the future state of the economy in the past. The Ipsos MORI Economic Optimism Index has a continuous record with polls in most months since mid-1979¹², and there is a positive correlation with GDP growth a year later (see chart). The sharp upturn in optimism recently also chimes with forecasts for the next twelve months. However, this is certainly not a perfect relationship – crowds can be wise, but not always so, and the public mood can be influenced by many other factors as well as pure economic rationalism.

KNOW SOMEONE MADE REDUNDANT?

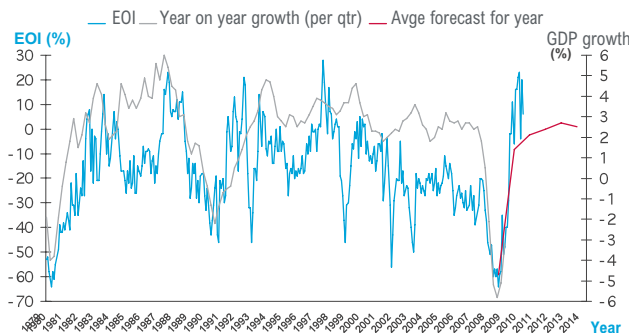
- Q. And do you personally know anyone who has been made redundant in the past six months?



Base: 1,011 British adults, 17th–19th April 2009

Source: Ipsos MORI Political Monitor

PUBLIC'S ECONOMIC OPTIMISM IS OFTEN IN LINE WITH ACTUAL GDP 12 MONTHS LATER – AND FUTURE FORECASTS



Forecasts taken from HMT average of independent forecasts:
<http://www.hm-treasury.gov.uk/d/201002forecomp.pdf>
 Note: GDP figures have been shifted forward by 12 months (ie 2009 GDP figures are shown against 2008 EOI)

ELECTION PRECEDENTS

Given the current political environment it is natural to compare where we are now with the situation before previous decisive elections – before Tony Blair's victory in 1997, before John Major's escape in 1992, and perhaps especially before the fall of the last outgoing Labour government, Margaret Thatcher's defeat of James Callaghan in 1979.

From the turn of the year before the 1979 election, the Conservatives were comfortably leading by double-digits, though then (as today) the public's sympathies were volatile: a one-point lead in November 1978 became a 19-point lead in February 1979¹³. Satisfaction with the Labour government was rock-bottom, with as many as three-quarters (75%) dissatisfied with the way the government was running the country in February 1979. This echoes the consistent Conservative lead in the polls we have seen since the autumn of 2007 and the prevailing dissatisfaction with the government of today, with around two-thirds of the public saying they are dissatisfied with the way the government is doing its job since the start of 2009 (though changes to the polling methodology since 1979 mean

we should exercise caution comparing the actual figures on a like-for-like basis).

The Conservatives under Mrs Thatcher seemed on course for a landslide victory, but they went on to win only comparatively narrowly, with 45% of the vote, compared to Labour's 38%. So what does this mean for the 2010 general election? What can we learn from the apparent sea-change in the political attitudes of the British people in 1978-1979 in order to better understand what might happen now?

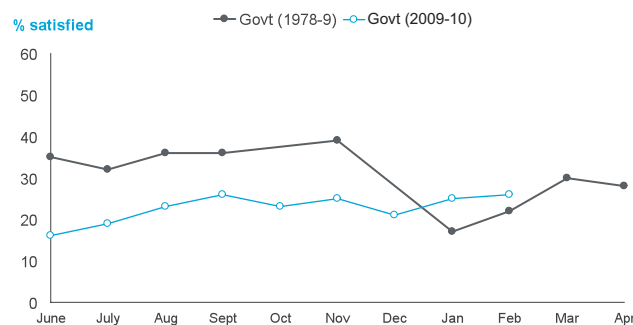
Whilst there are similarities between pre-election polling from the two eras, there are also many differences. A key concern for the Conservatives in 1979 was the unpopularity of Mrs Thatcher, who trailed behind Callaghan on all leader characteristics and crucially was seen as less able to deal with the unions, less able to understand the problems facing Britain and more out of touch. As discussed earlier, David Cameron, by contrast, leads Gordon Brown on most leadership qualities (though he stands level or only slightly ahead on the two which have proved to be the most important determinants of voting among the public in past elections). Whilst Cameron has not achieved a convincing lead over Brown on many qualities, he is certainly more popular than Thatcher was. The Conservative party of today, therefore, appear to be in a stronger position even compared to the precedent they set in 1979, although recent declines in overall ratings of David Cameron will be a concern.

Of course, political polls must be interpreted through the wider social and economic context. Callaghan had the opportunity of calling an election in the Autumn of 1978 but decided to carry on and face the country after the economy had improved. 'The Winter of Discontent' that followed severely damaged the Government's economic policy and its standing in the polls.



GOVERNMENT SATISFACTION 1978-9 AND 2009-10

Q. Are you satisfied or dissatisfied with the way the government is running the country?



Base: c. 1,000 British adults 18+ in each survey

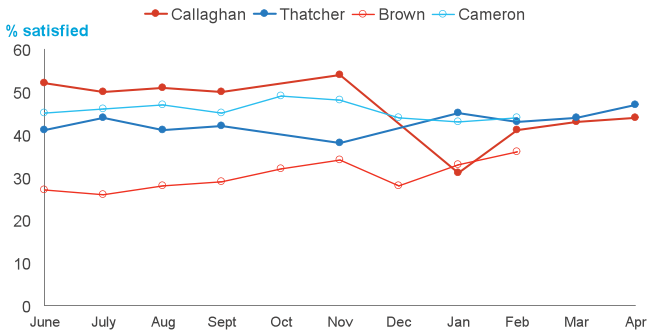
Source: MORI (1978-9)/
Ipsos MORI Political Monitor (2009-10)

CONT... ELECTION PRECEDENTS

One apparent advantage that Brown has over Callaghan is rising economic optimism. In November 2009, Ipsos MORI's Economic Optimism Index stood at +23, its highest level since the month Tony Blair was elected Prime Minister; for Callaghan, the index dropped as low as -33 in February 1979, with the Conservative Party's advertising campaign, which claimed 'Labour isn't working', supporting this malaise. But, as we have seen earlier, Labour in 2009 did not reap the benefits of this optimism, and whether it will be able to start claiming some credit soon for a recovery will be crucial to determining the final outcome of the election.

LEADER SATISFACTION 1978-9 AND 2009-10

Q. Are you satisfied or dissatisfied with the way ... is doing his/her job as Prime Minister/Leader of the party?



Base: c. 1,000 British adults 18+ in each survey
Source: MORI (1978-9)/
Ipsos MORI Political Monitor (2009-10)

TRUST, EXPENSES AND THE POLITICAL SYSTEM

Much of the summer of 2009 was dominated by the furore over MPs' expenses. Newspapers waxed wrathful about spurious claims for everything from yogurt and bath plugs to moat cleaning and duck islands. More significantly, however, the expenses scandal brought to the fore the broader question of trust – something that will be a key issue in 2010.

Indeed, it seems likely that the election will be fought while public trust in politicians, and perhaps by extension in the political system and political institutions, is at an all-time low. In 2009, "Smeargate" followed by the MPs' expenses scandal contributed greatly to this atmosphere.

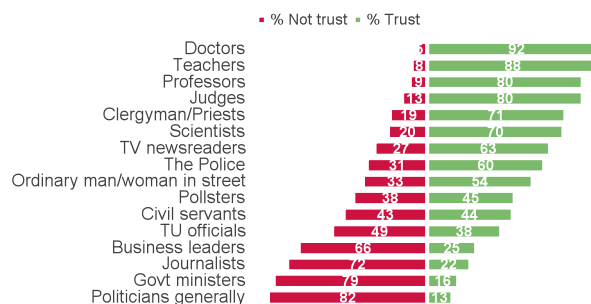
The current climate of distrust is illustrated in the results of our annual Veracity Index survey¹⁴. As ever, doctors emerged as the most trusted profession in the September 2009 wave: more than ninety per cent of the public (92%) say they trust doctors to tell the truth, closely followed by teachers, professors and judges. At the other end of the scale, though, things have changed since the previous survey. Usually, journalists and politicians

vie for the title of least-believed, but this year politicians won the prize outright. Trust in "politicians generally" fell to its lowest level in the 30-year history of the poll; just 13% of the public say they would trust them to tell the truth, and only 16% trust government ministers, down from 21% and 24% respectively in 2008. Journalists, meanwhile, are now apparently trusted by 22%.

There is much to suggest the public are cynical about politicians' motives; just after the MPs' expenses scandal broke, the vast majority believed that MPs put their own or their party's interests first (83%), compared to only 12% who believed they prioritise their constituents' or the country's. There is also disillusionment with the wider system; three-quarters of the public believed that the present system of governing Britain could be improved 'quite a lot' or 'a great deal' (75%).¹⁵ This is the worst it has been going back to 1973, other than in 1995 when John Major was forced to issue a 'back me or sack me' challenge to his own party, and after the revelation of the 'cash-for-questions' scandal in 1994.

WHO DO THE PUBLIC TRUST?

Q. For each, would you tell me whether you generally trust them to tell the truth or not?

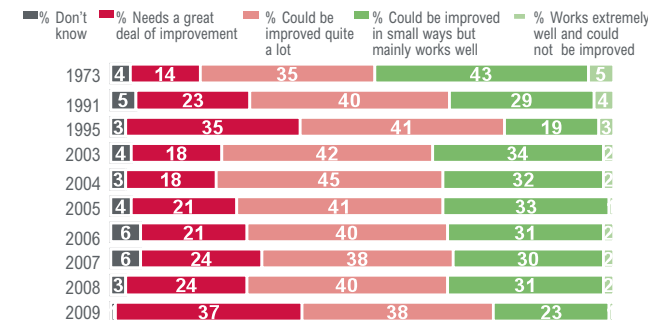


Base: 2,023 British adults aged 15+, 4-10 September 2009

Source: Ipsos MORI/RCP

PRESENT SYSTEM OF GOVERNING

Q. Which of these statements best describes your opinion of the present system of governing Britain?



Base: 1,001 British adults, 29th-31st May 2009.
Trend data: c.1,000-2,000 British adults

Source: Ipsos MORI/BBC

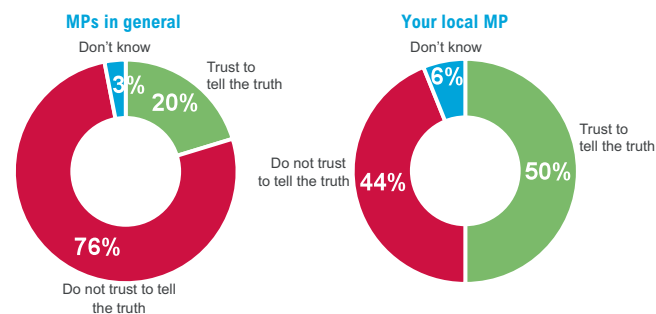
CONT... TRUST, EXPENSES AND THE POLITICAL SYSTEM

The “Smeargate” scandal of April 2009 may also have contributed to decreasing trust in politicians – and, as often seems to be the case, even when it is only one party that is directly implicated, many of the public are not prepared to discriminate. At the time, a third (37%) said that “Smeargate” had reduced their trust in the Labour government, but when asked to judge whether all the parties are as bad as each other, 72% said there is no difference between the parties¹⁶.

But will the expenses scandal, in particular, affect voting? On the one hand, trust in people's local MP remains higher than in politicians generally. However, half the public (52%) also say that if the candidate of the party they would otherwise vote for was caught up in the expenses scandal, they would vote for a different candidate, even though this would mean voting against the party they wanted to win the election¹⁷. This is a potentially huge effect: even if only one in five of these voters can really be taken at their word, that would amount to a 10% swing against any candidate embroiled in expenses allegations – enough to hand over any marginal seat to the other side or to make almost any safe seat marginal.

LOCAL MPS STILL MORE TRUSTED THAN NATIONALLY – BUT WILL THIS BE ENOUGH?

Q. I am going to read out some different types of people. Please tell me which you would generally trust to tell the truth and which you wouldn't?



Base: 1,001 British adults, 29th-31st May 2009

Source: Ipsos MORI/BBC

ELECTION TURNOUT

Will the damage that the events of 2009 have done to the credibility of the political system and of MPs boost turnout (“throw the rascals out”) or damage it (“they are all as bad as each other”; “don’t vote, it only encourages them”)? The most recent indications are that they have done neither: in December¹⁸, we found 51% of the adult public saying they were “absolutely certain to vote”, almost the same as the figure five years previously in December 2004 (52%)¹⁹, which suggests that at the moment we may be heading for as disappointing a turnout as the 61% at the 2005 general election.

On the other hand, in the Glasgow North East by-election in November 2009, voter turnout, at 32.97%, was a record low for a Scottish by-election and 12.8% down on the 2005 General Election.

Yet, findings from the end of 2008 (albeit before the MPs expenses scandal) suggest that there is still a strong sense among the public that voting in elections is essential or very important in order to be a good citizen (64%) and that voting is effective in having an impact upon how the country is run (72%).²⁰ These are sentiments that may persuade the public to vote in spite of their obvious reservations about politicians. The impact of the growing distrust in politicians on voter turnout is yet to be truly measured: for that, we will have to wait until the general election.

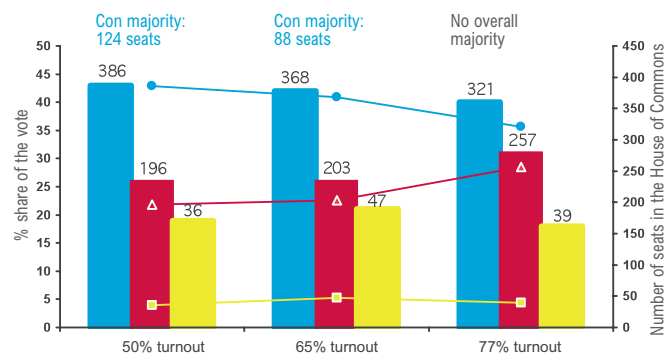
The level of turnout is not simply important as a reflection of the health of British democracy. In British elections the results can be affected significantly by the level of turnout. Historically speaking, a low turnout tends to benefit the Conservatives.

The underlying reason for this is simply that Conservative supporters tend to be firmer in their determination to vote than supporters of the Liberal Democrats and, even more so, than Labour supporters. Part of this simply reflects demographics

(Conservative supporters tend to be older and more middle class than Labour supporters, and these are the groups in which the voting habit is most strongly ingrained). Part of the effect is mitigated, because Labour turnout is lowest in the party’s safest seats, where the votes are not needed in any case. Nevertheless, the fact remains that those who might vote but are not certain to do so disproportionately support Labour rather than the Conservatives, and the potential effect in seats is huge.

Take our October 2009 poll. Only 50% of the sample said they were “absolutely certain” that they would vote in an immediate election and declared their voting intention; among this group the Conservatives had 43% share, Labour 26% and the Liberal Democrats 19%. Assuming a national uniform swing, this would give the Tories an overall majority of 124, a veritable landslide. On the other hand, if everybody voted according to their voting intention, implying a 77% turnout (which was exceeded not that long ago, in 1992, let it be remembered), the Conservative lead would be reduced to nine points, 40% to 31%, and uniform swing then would give us a hung Parliament. A turnout this high is probably unlikely to happen, but bearing in mind that the Conservatives need a seven percent swing to gain an overall majority (although if they perform better in the marginals than overall they may be able to win on a national swing lower than this), just how many of those less committed and enthusiastic supporters can be turned out to the polls could make a real difference to who we see in Number 10.

AT 50% TURNOUT, A LANDSLIDE; 77%, HUNG PARLIAMENT



Base: 996 British adults, 16-18 October 2009, by telephone

Source: Ipsos MORI Political Monitor

2. PUBLIC SPENDING AND SERVICES

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- › Education
- › Health
- › Welfare and benefits
- › Defence and Afghanistan



INTRODUCTION

The debate about the economy, of course, does not just have an impact on the result of election day itself. It also has an impact on what happens after that, including most obviously the amount that government can afford to spend on maintaining public services. Indeed, arguments about the next steps for public service reform are likely to be particularly vigorous in the light of differing views about the nature and scale of future public spending cuts.

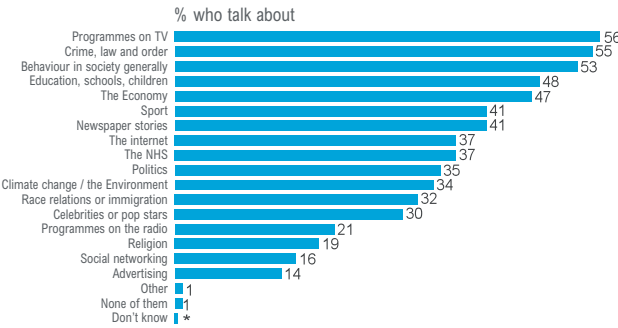
Moreover, moving beyond the political debate centred on the Westminster election, it is important to reiterate once again that public services themselves really do matter to people.

Indeed, when we ask people what they talk about they cite a wide range of topics, from entertainment and sport to more serious issues such as crime, the way people behave in society, education and the economy. But what people talk about is not always the same as what they worry about. In the same survey, 35% said they “feel strongly about” crime, law and order, 34% about behaviour in society generally, 27% about education, schools or children and 25% about the economy. Only 8% feel strongly about programmes on TV.²¹

Our research over 2009 reveals an intriguing mixed picture in terms of perceptions of key public services, and gives some interesting clues as to what the public will expect from such services in 2010 and beyond in the light of the straitened state of public finances.

TOPICS OF CONVERSATION

Q. Which, if any, of these things do you often talk about with other people nowadays?



Base: 2,206 UK adults aged 16+, 7-25 March 2009

Source: Ipsos MORI/BBC Trust

PUBLIC SPENDING

The leaders of all three major parties now acknowledge the need for cuts in public spending or a rise in taxes (or both) as the economy cannot continue to sustain present levels of public debt. However, the voters, it seems, are yet to be convinced. The question for policymakers is not whether to cut, but *what* to cut, *when* to cut and *how much* to cut – and how to communicate this to the public.

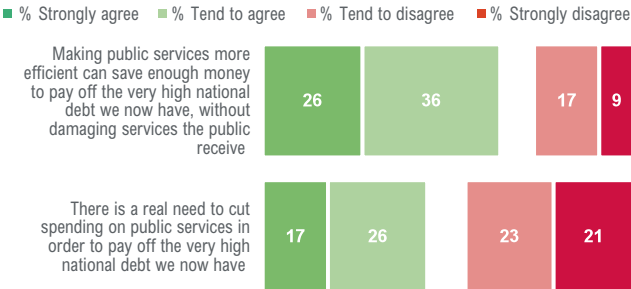
But the public is split on whether there is a real need to cut spending on public services to pay off the national debt (43% agree, 44% disagree)²². Further, nearly two-thirds agree with the suggestion that efficiency savings can cover the entire need for reduced spending without any damage to public services being necessary (62%). This offers a real challenge to politicians of all parties, who may find what they believe to be realistic and necessary actions are unacceptable to a public unwilling to make hard choices because they still believe in the possibility of an easier alternative.

However, whilst this suggests that many people still do not want to face up to the full impact the economic crisis will have on frontline services, shifts in opinion since last year suggest that messages on tough choices ahead *are* slowly beginning to filter through to the public. Between the summer and November there was an increase in those prepared to concede that public spending cuts are necessary. Similarly, those who felt that efficiencies on their own will not be enough doubled from 13% to 26%.

Of course, there is a substantial political dimension to the choice between cutting services and increasing taxes, which will make the outcome of this year's election pivotal to the country's future direction. Our summer survey of MPs²³ found that, in line with their parties' philosophies, Conservative MPs overwhelmingly prefer reducing spending to increasing taxes, while the balance of opinion among Labour MPs is strongly the other way.

MOST THINK EFFICIENCY SAVINGS ALONE CAN PAY OFF THE NATIONAL DEBT

Please tell me how strongly you agree or disagree with each of these arguments about public services and public spending

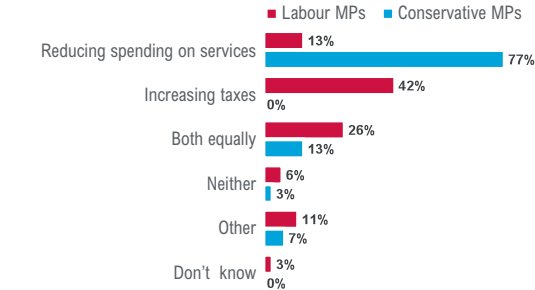


Base: 1,006 British adults, 13-15 November 2009

Source: Ipsos MORI Public Spending Index

MPs: CUT SPENDING OR INCREASE TAXES?

Q. If a future Government had to reduce its debts, there are likely to be two main choices, either increasing taxes, or making cuts to public services. In your view, should they concentrate more on reducing spending on public services or on increasing taxes?



Base: 110 MPs: 65 Labour MPs, 30 Conservative MPs, 15 Others, 8 June – 31 July 2009 Source: Ipsos MORI

CONT... PUBLIC SPENDING

The public is more evenly split: forced to choose, 53% of the public say they would prefer the government to maintain spending on public services even if it means increasing taxes and 42% would reduce borrowing even if it means spending on key services is cut. There are differences by party, with 55% support for reducing spending among Conservatives, compared to 33% of those intending to vote Labour or Liberal Democrat, but even this means within each party's vote there is no universal support for just one option.²⁴

In June²⁵ we probed further into the details of what cuts would be least unacceptable to the public were they forced to choose. Three-quarters (77%) said that if cuts were necessary, some services should be protected even at the cost of higher tax or deeper cuts elsewhere.

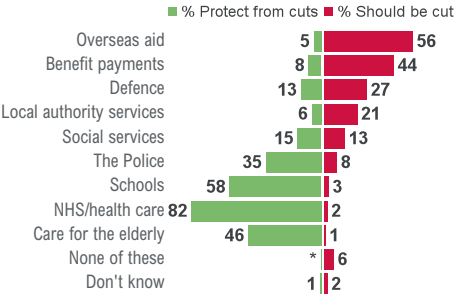
The core public services with which the public has the strongest emotional connection – the NHS, education, care for the elderly and the police – evoke the most protective reactions, and cuts in any of these would raise most opposition. Overseas aid and benefits payments are easier targets (even while both major parties have pledged to maintain spending on foreign aid). Another Ipsos MORI survey for the County Surveyor's Society (CSS) the following month²⁶, using a different list of services, again found overwhelming support for protecting health and (to a lesser extent) education from spending cuts, but few concerned about spending on tackling climate change or on transport, which must be added to the list of vulnerable spending areas.

So what does this mean for the upcoming election? First of all, there has been an underlying change in the public mood away from more government and public spending, even at the price of higher tax rises, from 76% support just before the 1997 election to 46% in June 2009. This could partly reflect a recognition of the extra money Labour has spent on public services since then, though it's just as likely to reflect a dissatisfaction with the results of that spending, as well as the current fiscal crisis.

Having said that, though, it is unlikely that the public sees this election as a simple choice between a tax and spend party on the one hand and a cut and save party on the other. Instead, perhaps voters in 2010 will decide not so much on who they think will tax or cut, but on who they trust most to make the right decisions at the right time.

WHAT CAN BE CUT?

Q. Which TWO or THREE, if any, of the following main areas of public spending do you think should be protected from any cuts? And which TWO or THREE, if any, of the following main areas of public spending do you think **should be cut** to restore public finances?



Base: All who think some services should be protected (773), 19-21 June 2009 Source: Ipsos MORI Public Spending Index

LOCAL AREA AND QUALITY OF LIFE

While many of these decisions about public spending and the implications they have for public services will be played out at a national level, we also need to consider a more basic question: what do people think of the local area where they live? This increasing focus on 'place' lies at the heart of the modern vision of local public services: rather than focusing simply on the performance of individual public services, it tries to take an overarching look at what makes a difference to the quality of life of individuals and communities.

September 2009 saw the publication by Communities and Local Government of the results for all English local authorities of the new Place Survey²⁷ – one of the main tools for collecting local perceptions data at the national level. The Place Survey measures a number of 'citizen perspective' indicators that will be used by government to assess how well local areas are working to address priorities around respect, cohesion, crime and quality of life - vitally important given the public's continued focus on these issues.

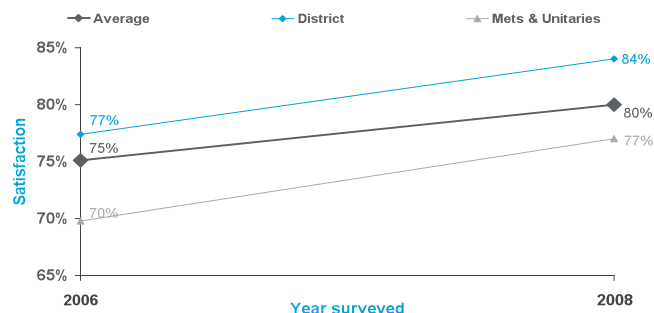
The results from the latest survey show that local authorities and their partners have made some real progress in tackling key quality of life issues in the eyes of local people. Satisfaction with local area has increased significantly since 2006²⁸ - four in five people now say that they are satisfied with their local area as a place to live.

There has also been a decline in perceived levels of anti-social behaviour (ASB), with the proportion of residents rating ASB as 'high' (as defined by the 7-strand index²⁹) dropping to one in five.

Yet, despite progress in these key areas being widely recognised by people across the country, local authorities still face an uphill struggle when it comes to getting credit for these improvements. In fact, with the exception of a few councils, satisfaction with how well local authorities run things has actually declined since 2006 (overall satisfaction has fallen from 53% to 45%, the first time it has fallen below 50% since statutory local authority surveys were introduced).

SATISFACTION WITH AREA OVER TIME

Q. Overall, how satisfied or dissatisfied are you with your local area as a place to live?

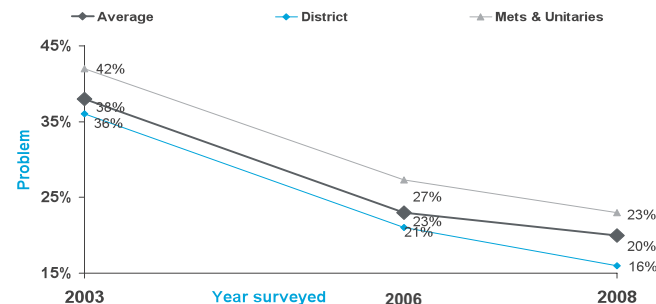


Base: Place Survey 2008/09 (352 local authorities), BVPI 2006 and 2003 (387 local authorities)

Source: Ipsos MORI/MORI

PERCEPTIONS OF ANTI-SOCIAL BEHAVIOUR ARE DOWN

Q. Thinking about this local area, how much of a problem do you think each of the following are... 7 strand ASB index

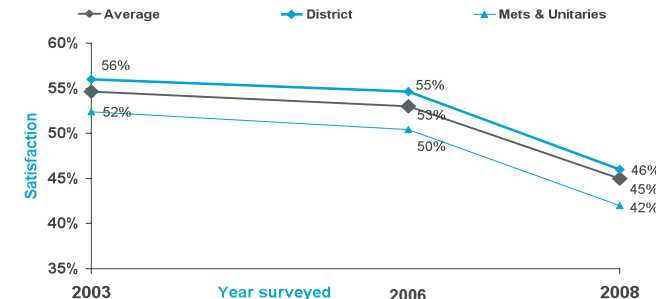


Base: Place Survey 2008/09 (352 local authorities), BVPI 2006 and 2003 (387 local authorities)

Source: Ipsos MORI/MORI

DESPITE IMPROVEMENTS IN PERCEIVED LOCAL QUALITY OF LIFE, SATISFACTION WITH THE COUNCIL IS DOWN

Q. How satisfied or dissatisfied are you with the way your local council runs things?



Base: Place Survey 2008/09 (341 local authorities), BVPI 2006 and 2003 (387 local authorities) BVPI 2003 Inner London mean excludes Islington, Newham and Tower Hamlets, BVPI 2003 Outer London mean excludes Croydon

Source: Ipsos MORI/MORI

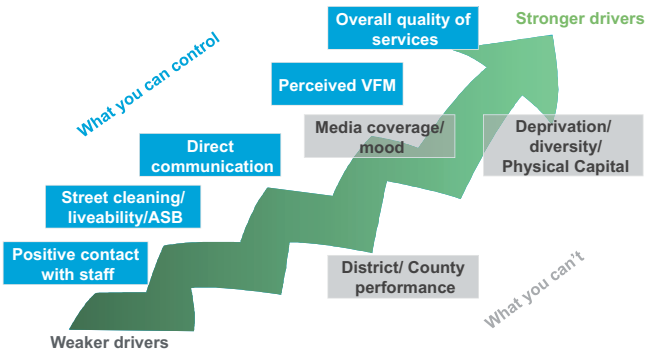
CONT... LOCAL AREA AND QUALITY OF LIFE

This seems to be largely a problem of perception, as for example, satisfaction with cleanliness of the local area has risen while satisfaction with the job that the local council is doing on cleanliness has fallen. Ipsos MORI has built up a model of the drivers of perception of local government over the years, which tries to understand why this perception gap exists. So while the delivery of good quality services is still the main driver of council reputation, communications, for example (including the role of the media), also have a big impact, and there will also be many external factors beyond the council's control that can have an effect on perceptions, such as the nature of the population they serve³⁰. As budgets get tighter, it will become even more important to make sure we are focusing on the right things.

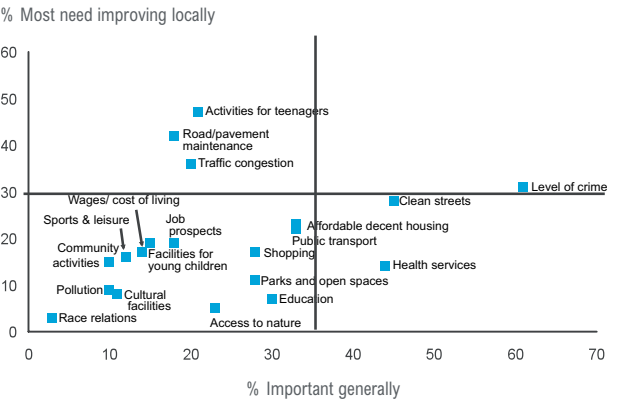
Looking forward, the public are clear in their priorities for improvement in their areas. Although crime remains a key priority for improvement generally, finding activities for teenagers is now the area of most pressing concern locally. Other key priorities include road and pavement maintenance, traffic congestion and clean streets.

So it is worth remembering that there is not just a general election this year, but local elections too, and it is still local issues such as streetscene and anti-social behaviour that makes a big difference to our daily quality of life. Furthermore, with all parties putting more emphasis on 'localism' and the delivery of services through local authorities (albeit with slightly different visions, as seen in the 'easyCouncil' vs 'John Lewis council' debate), their role is only going to increase in importance.

A MODEL OF DRIVERS OF LOCAL GOVERNMENT REPUTATION



DEVELOPING PRIORITIES FOR IMPROVING QUALITY OF LIFE



Base: All valid responses Source: Ipsos MORI

CRIME

From 2003 until late 2008 our research showed crime rising steadily in prominence as a political issue. In recent months however, as economic concerns came more to the fore the importance attached to crime began to fall.³¹ Nevertheless, as shown earlier, levels of crime and anti-social behaviour remain a concern for many people, and once the public feels the economic situation is more under control, crime is one of the key issues likely to re-assert itself in the media and public debate.

Yet this period of apparently rising concern about crime is against a long term fall in reported crime from a peak in the mid-90s, as measured by the British Crime Survey³². We have discussed the perception gap between recorded crime and public concern about crime at length elsewhere³³, and many of the issues we have highlighted above as influencing people’s perceptions of their local area also apply to the issue of crime. However, the nature of public concern changed in 2009, with a striking rise in the prevalence of knife crime as an issue concerning the public, reflecting a large increase in media coverage. Concern about knife crime then seemed to fall at the end of 2009, again perhaps reflecting a change in coverage.

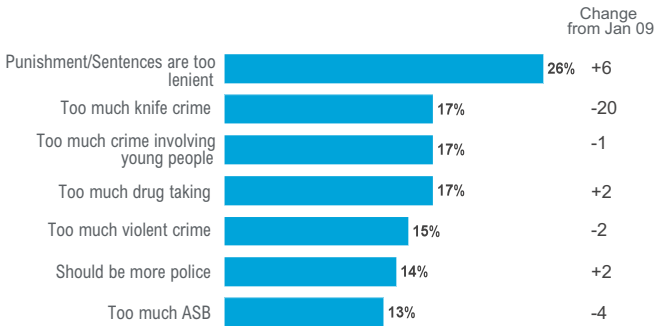
The policy debate around crime has moved on too. Performance is now to be measured based on *confidence*: the extent to which local people agree that the police and other local partners are tackling crime and anti-social behaviour successfully. Police forces have been set stretching targets to increase public confidence in their local area, and at higher levels than the government has achieved nationally (even though public confidence in the government on crime did seem to stabilise in 2009).

If the next government plans to make cuts in spending on crime and justice, the public are very clear on what should remain untouched. In common with other public services, when it comes to the crunch people don’t want to lose the frontline services that they think affect them personally: fewer police on the beat is the least acceptable cost-saving measure among the public. Instead, “easy targets” such as a reduction in the number of education programmes for prisoners are much more at risk in the public’s eyes.

This emphasis on protecting frontline is in line with the rhetoric coming from the political parties, but this is likely to present practitioners with a very difficult balance to strike. Prevention and rehabilitation are seen as some of the most effective methods for reducing crime in reality, but while the public can see some sense in prevention, they are much less convinced that rehabilitation works.

MOST IMPORTANT ISSUES FACING BRITAIN WHEN IT COMES TO CRIME

Q. What would you say are the three most important issues facing Britain today when it comes to crime?

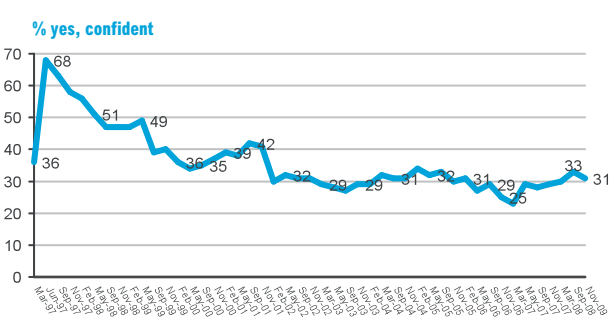


Base: c.1,834 adults aged 16+ in England and Wales, May 07 – Nov 09

Source: Ipsos MORI

CONFIDENCE IN THE GOVERNMENT ON CRIME HAS STABILISED OVER TIME

Q. Please tell me whether you are confident in the current government, or not, when it comes to cracking down on crime and violence?

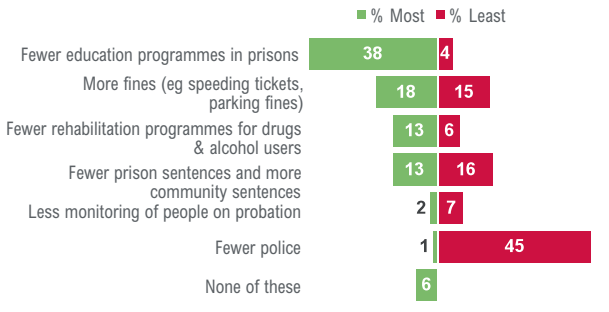


Base: c.1,000 British Adults (March 2008 c.500 British Adults)

Source: Ipsos MORI

SPENDING CUTS IN CRIMINAL JUSTICE

Q. If the Criminal Justice System was to face lower levels of spending, which of these, if any, would you be most/least willing to accept?



Base: 1,041 online British adults aged 16-64, 4-7 Sept 2009

Source: Ipsos MORI

CONT... CRIME

Punishment

As concern about knife crime has fallen, perceptions that sentencing is too lenient have risen to become the public’s main worry when it comes to law and order (as has been often been the case in previous years). In November an Ipsos MORI survey examined British attitudes towards the death penalty.³⁴ and it is clear that there remains support for capital punishment among the British public at large for certain types of offences.

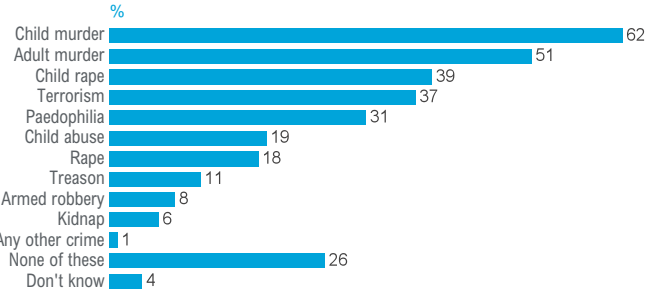
A clear majority of the public (70%) think the UK should still have the death penalty as the maximum possible penalty for at least one of the twelve different types of crime surveyed, and 76% agree that “there should be more open debate in the UK about

the penalties for serious crimes, including the death penalty”. Furthermore, there is little sign that support for the death penalty is significantly weakening: back in 1978 a similar proportion (77%) said that the death penalty could sometimes be justified.

Having said that, it may well be that these numbers are more of a reflection of the general frustration with the (perceived) leniency of sentencing referred to earlier. While we know that people’s views towards the death penalty can change as they learn more about it and its impact in detail, this is against a background where three-quarters (73%) agree that “the views of the public are being ignored by politicians and the Government when setting maximum sentences and penalties for serious crimes”, and 77% say that they “are concerned that the maximum penalties (or sentences) that are set in the UK for child abuse are not severe enough”.

CAPITAL PUNISHMENT

Q. In your opinion which of the following crimes, if any, do you think the UK should still have the death penalty for as the maximum possible penalty?



Base: 967 British adults aged 15+, 10-16 July 2009

Source: Ipsos MORI/Channel 4

EDUCATION

Until the beginning of 2009, more of the public were optimistic about the future of education than were pessimistic. However, our most recent data demonstrates that concerns about the future of our schools are increasing, continuing a broad trend apparent since the early part of the decade.

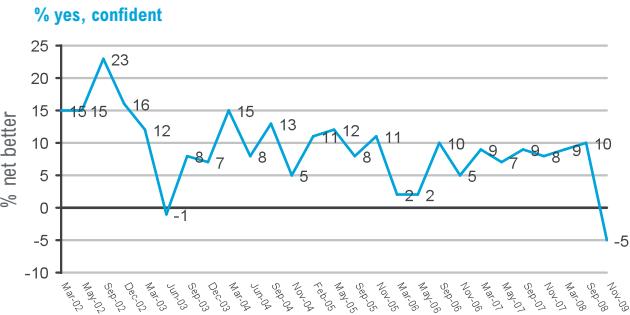
This dip in optimism may reflect concerns about how future spending cuts might impact on education. There is resistance to cuts that would imply larger class sizes. In fact, any of the areas we suggested for cuts in education budgets would clearly generate significant opposition.

However, despite these concerns about the future, it is worth emphasising that the vast majority of parents are positive about the school their child goes to: in a national survey published at the beginning of 2009 more than nine in ten said they were satisfied with their child’s school (91%) and similar proportions agreed that their school has a good reputation (85%) and supported their child’s well-being (87%)³⁵.

The picture is also positive when it comes to university education. According to the National Student Survey which we conduct for HEFCE,³⁶ the overall satisfaction rate for higher education (HE) students studying in England remains high: 81% said that they were satisfied with their course overall, with high levels of satisfaction also expressed for various more detailed aspects of the HE system. Assessment and feedback was the area with which students were least satisfied, but even here two-thirds were satisfied.

OPTIMISM ABOUT THE FUTURE OF EDUCATION?

Q. Thinking about the quality of education over the next few years do you expect it to get better/worse?

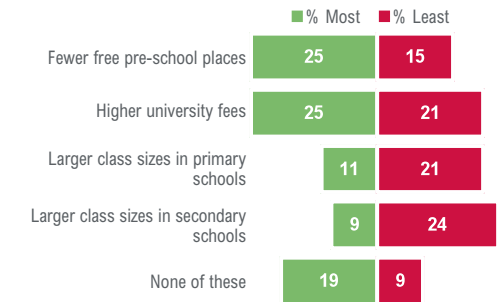


Base: c.1,000 British Adults

Source: Ipsos MORI

THE PUBLIC DOESN'T LIKE LARGER CLASS SIZES

Q. If education services were to face lower levels of spending, which of these, if any, would you be most/least willing to accept?

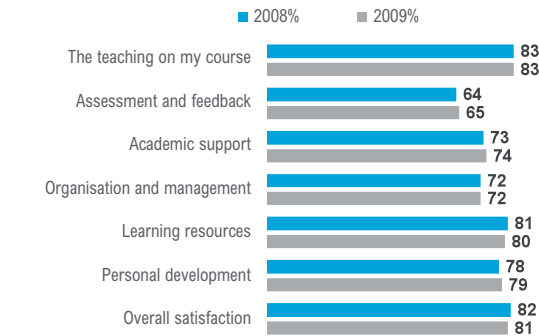


Base: 1,041 online British adults aged 16-64, 4-7 Sept 2009

Source: Ipsos MORI

SATISFACTION OF HIGHER EDUCATION STUDENTS

Satisfaction with different areas of the higher education system:



Base: 223,363 UK British adults 18+, Jan-May 2009

Source: Ipsos MORI

HEALTH

For much of the period since the Labour government was elected in 1997, the single issue most frequently cited by the public as the most important facing the country has been health care and the National Health Service. It has also been the issue selected by more of the public than any other as important to helping them decide which way to vote. But since 2006 its salience to the public has been in steady decline, displaced by concerns over first crime and immigration, and more recently the economy.³⁷ In 2009, the number citing the NHS as one of the most important issues facing the country never topped 20% (compared to 40% in 2007 and 72% back in 2002).

This is certainly not because the public are complacent about the future of the NHS. On the contrary, consistently from the start of this parliament more people have said they expect the NHS to get worse over the next few years than to get better. Nevertheless, the figures in November 2009 were the best since the month of the last general election, with 21% expecting improvement and 29% a worsening of the situation.

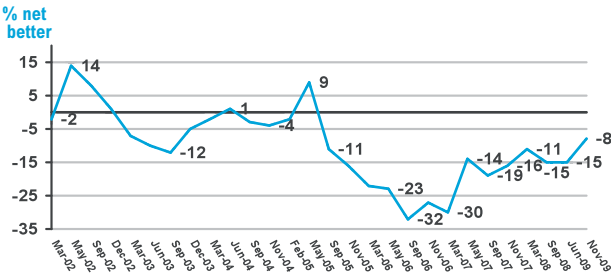
Further, despite ongoing public pessimism about the future of the NHS in general, our data shows some of the highest levels of satisfaction with individual health services we have ever recorded, both locally and nationally. It appears that NHS services are finally beginning to get some credit for the improvements regulators say have happened following the huge investment in recent years.

In many ways, 2009 was the year when the NHS had to come to terms with the idea that the spending increases lavished on the health service over the past decade will not continue for the foreseeable future. While both Labour and Conservative governments say they would protect the NHS from the worst of the painful cuts, the fact that budgets will be flat, will feel to many to be the equivalent of a cut after years of growth, and will necessitate change in the way things are done locally and nationally.

If cuts are to be made in 2010 the public are adamant that they should not affect frontline services or the core aim of the NHS to be 'free at the point of use'. More preferable to many would be denying treatment to patients who persist in unhealthy lifestyles - more than half the public support this idea (although whether many of them actually view themselves as, for example, eating or drinking too much is of course another matter). Given the importance of health services to individuals and communities, it will be vital that the NHS engages local people in making the tough choices about future spending priorities.

EXPECTATIONS OF THE NHS: NOW STABILISING AFTER RECOVERY?

Q. Thinking about the NHS over the next few years do you expect it to get better/worse?

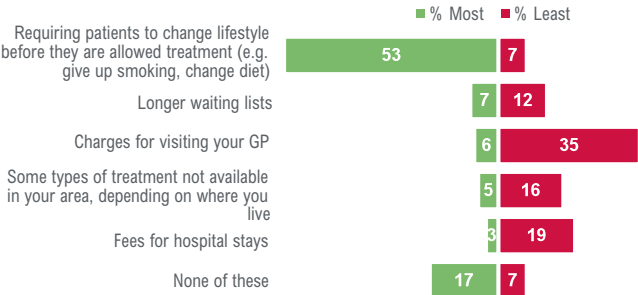


Base: c.1,000 British Adults

Source: Ipsos MORI Public Spending Index

LIFESTYLE CHANGES BEFORE CHARGES IN THE NHS

Q. If the NHS was to face lower levels of spending, which of these, if any, would you be most/least willing to accept?



Base: 1,041 online British adults aged 16-64, 4-7 Sept 2009

Source: Ipsos MORI

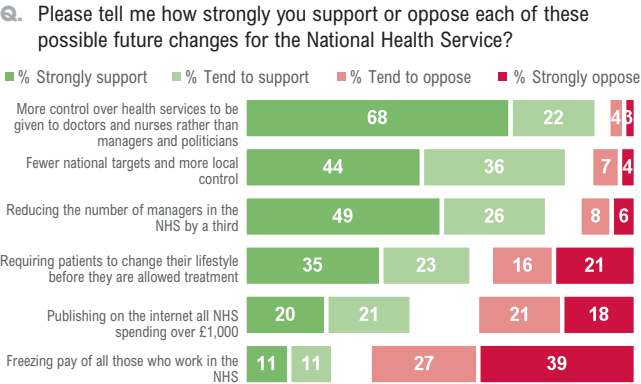
CONT... HEALTH

We also tested likely policies of future governments to reform and streamline the NHS. There is strong support for reducing layers of management in the NHS, and taking the focus away from national targets and politicians to local control and doctors and nurses. Again, while all parties agree on the need for decentralisation, whether this will automatically lead to savings (regardless of their other benefits) is another matter. There is though much less support for freezing the pay of all NHS workers or even publishing on the internet all NHS spending over £1,000.

Of course, the most prominent medical story of 2009 was about Swine Flu. In May 2009, Ipsos MORI conducted a survey looking at the British public's perceptions of and behaviour towards the disease, on behalf of King's College London and the Health Protection Agency.

Close to three-quarters of all people surveyed (73%) did not feel worried about the possibility of personally catching Swine Flu in the next 12 months. Two-thirds (68%) believed that the media over-exaggerated the risks of catching Swine Flu, and only a quarter said that they were “very “ or “fairly” worried about the prospect of personally catching it in the next year. The findings have been analysed in an article published in the *British Medical Journal*³⁸, which concludes that “the results support efforts to inform the public about specific actions that can reduce the risks from swine flu and to communicate about the government's plans and resources. At the time of writing, it appears that the public's relative lack of concern has been somewhat justified – however it is probably better for the government to have been (and to have shown itself to have been) prepared, for the worst.

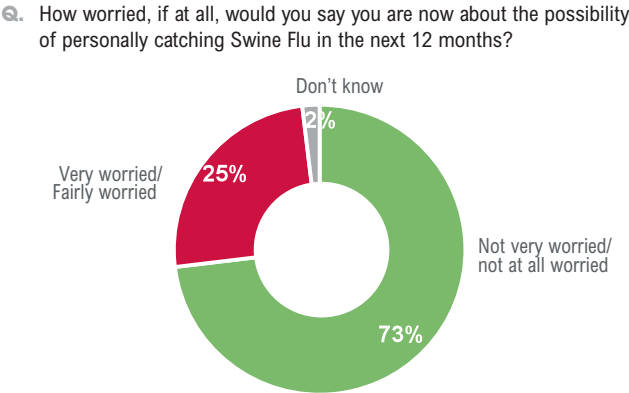
FEWER MANAGERS AND MORE LOCAL CONTROL MOST SUPPORTED CHANGES FOR THE NHS



Base: 1,006 British adults, 13-15 November 2009

Source: Ipsos MORI Public Spending Index

WORRY ABOUT SWINE FLU



Base: 1,004 GB Adults 15+, 1st-7th May 2009

Source Ipsos MORI

WELFARE AND BENEFITS

When identifying candidates for spending cuts, it is inevitable that benefits payments will come under the microscope.

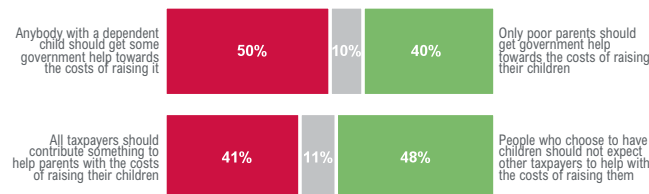
In January 2009, our survey for Policy Exchange found that although the public want to ensure that provision is available to support families, opinion is often split very evenly on who should pay for that provision, whether provision should be targeted more strictly and whether financial support for families could be made conditional.

Many uphold the principle that people without children pay more tax so that families raising children can receive increased support (43% support, 32% oppose). But at the same time, almost half of Britons think that people who choose to have children should not expect other taxpayers to help them with the costs of raising them (48%).

There are also splits of opinion on other family benefit issues. For example, slightly more people think that anybody with a dependent child should get some government help towards the costs of raising him/her (50%) than think that 'only poor parents should get government help towards the cost of raising their children' (43%). And there is also some support for penalising "bad parents": almost half of the public support the idea that parents who fail to bring up their children properly should lose eligibility for family payments (49%). All this points out to more hard decisions ahead for whichever government wins power.

PUBLIC MONEY FOR PARENTS

Q. Which of these statements comes closest to your view?



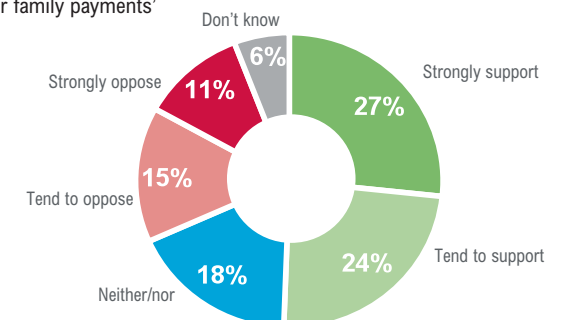
Base: 2,000 British adults 16+, 9-15 January 2009

Source: Ipsos MORI / Policy Exchange

BRINGING UP CHILDREN

Q. How strongly would you support or oppose the following?

'Parents who fail to bring up their children properly should lose eligibility for family payments'



Base: 2,000 British adults aged 16+, 9-15 January 2009

Source: Ipsos MORI / Policy Exchange

DEFENCE AND AFGHANISTAN

One obvious threat of a squeeze on public spending is on those sectors seen as less central to government aims or with less direct impact on the general population, as cuts are politically less difficult to impose. The harder it is to find politically acceptable cuts in core services, the greater will be the pressure to reduce spending on those services seen as peripheral, least urgent or seeming to affect fewest voters. Overseas aid is naturally vulnerable on the last count, but both main parties have promised to ring-fence this budget and, since the sums involved are very small relative to core domestic spending, they may be able to honour this promise.

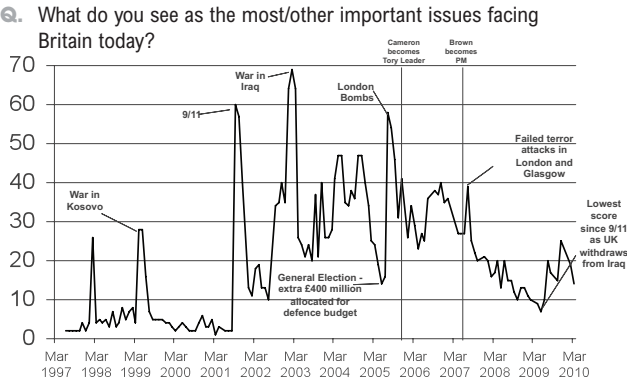
Defence is complicated by the situation in Afghanistan, but may be protected from public spending cuts considering the criticism of the equipment, resources and facilities available to British service men and women. As the following chart shows, although issues of defence, foreign affairs and terrorism remain of relatively low importance in the public consciousness, their profile is probably more event-driven than other issues, and has been rising in recent months, coinciding with high levels of

fatalities and high-profile questions about resources and US/UK military strategy going forward.

Research undertaken in Ipsos MORI's Political Monitor confirms that public support for the Afghan campaign continues to decline. In July 2009, 52% of people opposed the Afghan campaign, compared to 41% who supported it. Developments since then, such as problems encountered during Operation Panther's Claw and the mounting death toll, not to mention the Chilcot Inquiry, may have further increased opposition to the Afghan conflict.

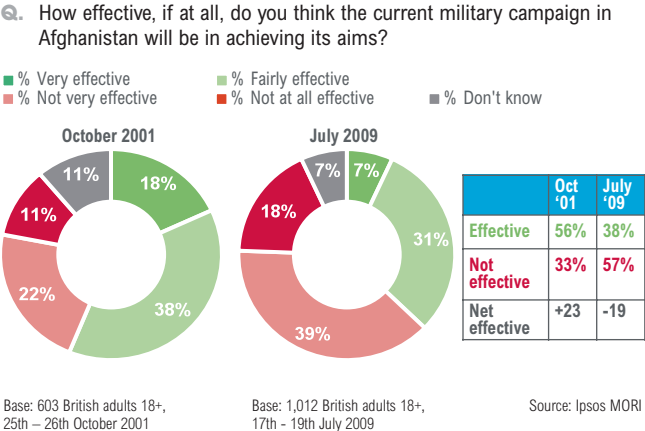
Similarly, there is a lack of confidence that Britain will be able to achieve its aims in Afghanistan, with only just over a third (38%) feeling the campaign is effectively achieving its objectives – much lower than when the war started.

ISSUES FACING BRITAIN: DEFENCE / FOREIGN AFFAIRS / INTERNATIONAL TERRORISM



Base: representative sample of c.1,000 British adults age 18+ each month, interviewed face-to-face in home
Source: Ipsos MORI Issues Index

MORE ARE SCEPTICAL THAN ARE CONFIDENT ABOUT THE LIKELY EFFECTIVENESS OF THE CAMPAIGN



3. SOCIETY

- › Social mobility and equality
- › Immigration
- › Environment and climate change
- › Business ethics
- › Europe
- › Science and beliefs
- › New Media and the Digital Divide



SOCIAL MOBILITY AND EQUALITY

With so much attention being paid to the immediate and short-term impacts of the recession, it is easy to overlook the more long-term effect it can have on society as a whole. For instance, Ipsos MORI research for the Sutton Trust has seen a decline in the British public's optimism about opportunities for advancement, with three-quarters saying the recession will limit chances for upward social mobility. This is going to be a key battleground for 2010, with all the main parties wanting to be seen as the champions of aspiration.

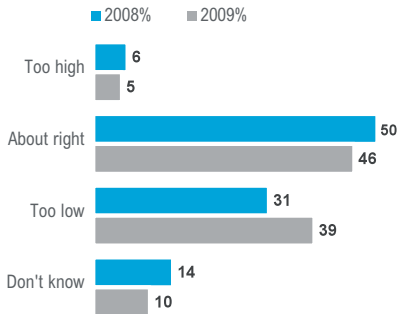
Indeed, the public is less convinced than they were in 2008 that opportunities for advancement exist. The number of people who think that opportunities for social mobility in Britain are 'too low' has risen to two in five (39%), and only 38% now believe that people have equal opportunities to get ahead – a sharp drop since 2008 when over half (54%) agreed that this was the case.

Three-quarters of the public also believe that differences in income in Britain are too large – though only just over half (55%) see it as the responsibility of the government to reduce differences in income (this figure rises to almost two-thirds among people in the C2DE social classes).

However, views on how social mobility should play out in society remain largely unchanged, despite the significant socio-economic events of the last few years. As the chart below shows, ultimately, Britain remains split between two opposing, long-term, underlying social values: equality and the collective vs. individual rewards and responsibilities. Governments have to continuously balance the public's long-held ideal for high-quality services that are 'free at the point of use' and available for all regardless of wealth – a society which emphasises the social provision at welfare – with a much more sceptical outlook on what collective provision can achieve over individual action.

OPPORTUNITIES FOR SOCIAL MOBILITY

Q. In general would you say that opportunities for social mobility in Britain are too high, about right or too low?

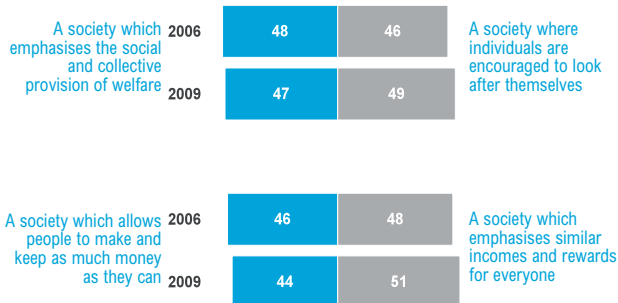


Base: 2,048 British adults, 6-21 July 2009

Source: Ipsos MORI Public Affairs Monitor

HAS THE RECESSION CHANGED OUR VIEW OF SOCIETY?

Q. People have different views about the ideal society. For each of these statements, please tell me which one comes closest to your ideal.



Base: c. 1,000 British adults 18+ each month

Source: Ipsos MORI Political Monitor

CONT... SOCIAL MOBILITY AND EQUALITY

Equality

An Ipsos MORI survey conducted in October 2009³⁹ found that half the public (52%) do not believe that in Britain, men and women on the whole receive equal pay for doing jobs of equal value (but men are more likely than women to believe that there is equality).

When told that, in fact, women are paid on average 23% less than men for doing jobs of equal value, the public overwhelmingly (94%) agree that it is important to eliminate this pay gap, and 85% support the introduction of a legal requirement for employers to conduct annual pay checks to see if they are

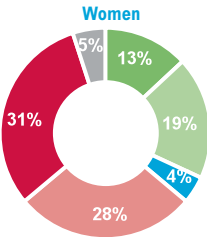
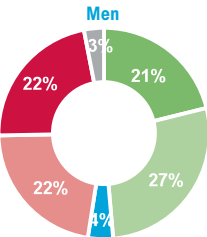
unfairly paying men and women differently for work of equal value, and to rectify the situation if they are.

In spring 2009, Ipsos MORI research for the Equality and Human Rights Commission also explored the views of Muslim women towards their jobs and their prospects for progression within them.⁴⁰ In some aspects, the study revealed Muslim women to be positive about opportunities for success and career prospects in Britain. Seven in ten (71%) believe that the country will have a Muslim woman MP in the next ten years and around a quarter (28%) believe a female Muslim Prime Minister is a likely prospect. Among Muslim women who work, a third (33%) say they could imagine themselves becoming leader of their organisation, and two-thirds (68%) believe it is possible for Muslim women to reach senior positions in the workplace. However, one in five (22%) of those currently in employment believe that employers are anti-Muslim – double the number of non-working Muslim women who believe this is the case.

IS THERE A PAY GAP BETWEEN THE SEXES?

Q. Please tell me whether you agree or disagree with the following statement: 'In Britain, men and women on the whole receive equal pay for doing jobs of equal value'.

■ % Strongly agree ■ % Tend to agree ■ % Neither / nor
■ % Strongly disagree ■ % Tend to disagree ■ Don't know



Base: 1,055 GB adults 16+, 2-4 October 2009

Source: Ipsos MORI

IMMIGRATION

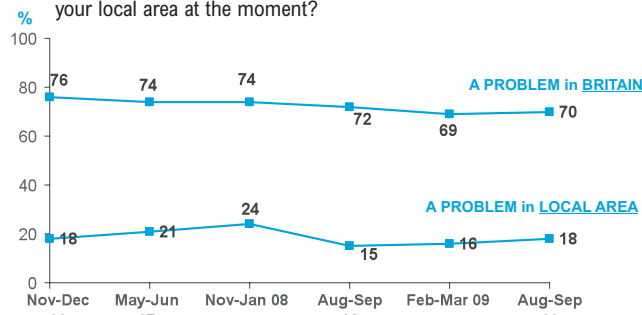
After the economy, and along with crime and law and order, race relations and immigration was seen as one of the top three issues facing Britain throughout 2009, and our latest figures in February 2009 show that it is in second place (notwithstanding a slight fall from the peak it reached after the appearance of Nick Griffin, the leader of the BNP, on BBC's Question Time). Immigration is traditionally an area where the Tories are seen as having the best policies; however, there is support for the Points Based System introduced by Labour (albeit also supported by the Conservatives), even though most know little about it. Furthermore, the experience of 2005, when immigration was one of the key issues of the campaign, shows that this is an issue that has to be handled carefully. Despite it being one of the most recalled features of the Conservative campaign, and despite the overall increase in seats that they saw that year, it is not clear that this focus on immigration actually helped the Conservatives broaden their support⁴¹.

The public itself is split over the benefits immigration brings to Britain. In August-September 2009, a third agreed with the statement "immigration is good for Britain", a third disagreed, and a third were either neutral or didn't know⁴². Among those with concerns (particularly likely to be older, or from lower social grades), they centre around the burden immigration places on public services, and also a perception that it has an impact on crime rates. On the other hand, a majority (55%) does believe in the cultural benefits it brings by making Britain more open to new ideas and cultures, while around a third can see economic advantages and the need for immigration to fill Britain's skills shortages; whether this will continue as the recession plays out remains to be seen.

Immigration is also a good example of the local/national perception gap we find in many other public services: people are over three times as likely to say it is a problem in Britain than in their local area (70% vs 18%). Following on from this, there is dissatisfaction with the way that the government is dealing with immigration and asylum (although this is just beginning to show a slight fall), and a consistent pattern whereby the clear majority of the public think that rules on immigration should be much tougher, supporting, for example, immigrants being made to learn English or having to have citizenship lessons about the British way of life. In fact, this support for tougher rules has continued more or less unchanged since at least 2006 (and probably much longer), despite the changes in the immigration system since then. All of which suggests that while immigration remains a key touch-stone issue for the public, it may not actually shift how many people vote.

SEVEN IN TEN PEOPLE SEE IMMIGRATION AS A PROBLEM AT A NATIONAL LEVEL – BUT CONCERN LOCALLY IS MUCH LOWER

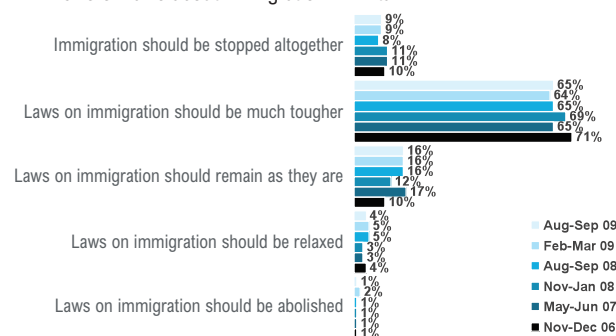
- Q. Overall how much of a problem, if at all, do you think immigration is in Britain at the moment?
- Q. And how much of a problem, if at all, do you think immigration is in your local area at the moment?



Base: All Respondents: Wave 1 (1,001); Wave 2 (1,011); Wave 3 (1,004), Wave 4 (539); Wave 5 (1,030), Wave 6 (1,040)
Source: Ipsos MORI

OVER SIX IN TEN PEOPLE WANT MUCH TOUGHER LAWS ON IMMIGRATION

- Q. Please tell me which one of these statements comes closest to your views on laws about immigration in Britain?



Base: All Respondents: Wave 1 (1,001); Wave 2 (1,011); Wave 3 (1,004), Wave 4 (1,085); Wave 5 (1,030); Wave 6 (1,040)
Source: Ipsos MORI

ENVIRONMENT AND CLIMATE CHANGE

While the impending cuts in public spending will inevitably shape how Britain continues to tackle environmental problems and climate change, all the major political parties accept the dangers of global warming and have to some extent formulated policies to combat it. However, we have noted in previous years that the environment is still low on the public's list of concerns and that they seem reluctant to take any inconvenient practical steps to protect it.

Our monthly tracking of “important issues”⁴³ has found the salience of environmental issues to the public has fallen as other more pressing concerns intrude: on average in 2006 and 2007, 10% of the public named the environment or pollution as one of the most important issues facing the country, peaking at 19% in 2007. (By way of comparison, the number naming the NHS as the most important issue over the same period hit a peak of 47%, as race relations/immigration reached 45%.) But from this already low level, the numbers naming the environment fell to an average of between 7% and 8% in 2009, with a low of 5% in August.

Despite that, two-thirds of the public are convinced that climate change is currently affecting Britain (66%), and an even greater proportion is convinced that climate change is affecting the planet (74%). A third (35%) also already feel directly affected by its impacts.

Regardless of their overall level of concern or sense of the urgency of the issue, it is clear that people expect more leadership and action from government on this issue. In 2009, Ipsos MORI conducted a series of deliberative discussions⁴⁴, commissioned by the Department of Energy and Climate Change, the Welsh Assembly Government and the Northern Ireland Executive, aimed at establishing the bases on which the public would be prepared to take up renewable energy generation and energy conservation.

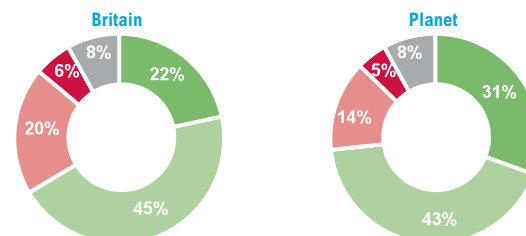
Participants wanted to see bold leadership from government, based around assistance rather than coercion - fixing clear goals, a deadline for achieving them, help with upfront costs, and setting out what individuals, government and businesses all need to do to get there.

And despite the low salience of the environment generally at the moment, climate change is clearly a key environmental issue in the public consciousness. More than a third of people (35%) describe it as the most important environmental issue facing Britain today and there is a strong desire for it to appear high on the political agenda too. Three-quarters of the British public now say they would like to see the government do more on climate change (75%) which is a significant increase from 2008 (68%). However, the public also feel that businesses have a role to play in tackling climate change, with half of adults (53%) concerned that British businesses are not doing enough to prepare for climate change.

CLIMATE CHANGE IMPACTS IN BRITAIN AND ACROSS PLANET

Q. How convinced are you, if at all, that climate change is currently affecting Britain? How convinced are you, if at all, that climate change is currently affecting the Planet?

■ % Totally convinced ■ % Fairly convinced ■ % Don't know/no opinion
■ % Not very convinced ■ % Not at all convinced



Base: 1,000 British adults 16+, 14th-20th August 2009

Source: Ipsos MORI

CONT... ENVIRONMENT AND CLIMATE CHANGE

As well as demanding further action on the part of the government and business, there are signs that the British public are also increasingly willing to do their bit. Four in five people (81%) say they have taken action over the last year to help reduce climate change (though of course this could also be a continuation of a past behaviour). The most recent Defra Behaviours and Attitudes study also shows a slight increase in the proportion of people willing to do things for the environment and a perception that being green is no longer a minority lifestyle.

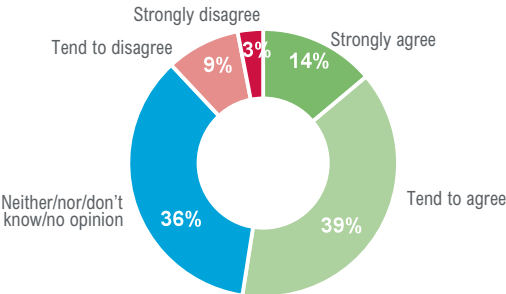
Yet, despite these good intentions, Ipsos MORI research for the RAC Foundation⁴⁵ suggests that increasing public awareness of environmental issues is not necessarily translating to a 'greener' approach when it comes to transport. The study confirmed that

cars are still the most popular way of getting around by some margin – nine in ten people (87%) had travelled by car within the previous month, compared to just over half (56%) who had taken any form of public transport. Moreover, the number of people saying they would travel less by car if local public transport were better has actually *fallen* considerably over the last decade.

If the public are to change their behaviour, there is much for the next government to do to convince them that there are viable alternatives.

BUSINESS ACTION AROUND CLIMATE CHANGE

To what extent, if at all, do you agree or disagree with the following statement about climate change: **'I am concerned that British businesses are not doing enough to prepare for climate change'**



Base: 1,000 British adults aged 16+, 14th-20th August 2009 Source : Ipsos MORI

RELIANCE ON THE CAR

■ % Strongly agree ■ % Tend to agree ■ % Tend to disagree ■ % Strongly disagree

I would find it difficult to adjust my lifestyle to being without a car



I would travel by car less if bus and train services around here were better



Base: All car drivers, 2009: 624; 1999: 2,295 Source: Ipsos MORI/RAC Foundation

BUSINESS ETHICS

Research by the Ipsos MORI Reputation Centre⁴⁶ suggests that the importance of corporate social responsibility to people’s purchasing decisions has declined this year as the economy continues to dominate the public’s concerns. When choosing a purchase, only a quarter of the British public now think it is very important that a company shows a high degree of corporate social responsibility – the lowest level we have seen since 1997, and a fall from 43% in 2008.

However, this shift in opinion, while significant, should not be overstated - around three-quarters (73%) of people do still believe that ethical purchasing is at least fairly important. Moreover, the majority of companies and key stakeholders working in this field believe that companies will continue to invest in corporate responsibility.

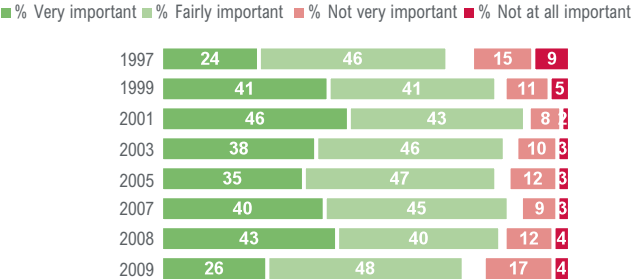
The financial crisis has also affected public views of corporate morals in other ways. Ipsos MORI Loyalty research looks into current views of the retail banking industry, including feelings around fairness, blame for the credit crisis, financial engagement and future behaviour in the industry.⁴⁷ There is a

degree of recognition among the public that individuals bear some responsibility for the events of the crisis, with almost three in five people (57%) agreeing that ‘choices made by the general public to take on personal debt contributed to the recent banking crisis’.

However, in many cases, people do not seem ready to take responsibility personally – only a fifth (20%) admit that they have not ‘made responsible choices about borrowing and debt over the last five years’. Certainly, though, the reputation of banks appears to have been damaged as a result of the events of the last few years. In 2005, seven in ten people agreed that ‘on the whole, banks treat customers fairly’; by late 2009, this had dropped to 50%, with over a third of people (37%) now disagreeing (though it is interesting to note that 79% believe their own bank treats them fairly). And this is mirrored among opinion formers: at the end of 2009 85% of business and financial journalists and 70% of MPs said they felt unfavourable towards banking⁴⁸.

IMPORTANCE TO PURCHASE FALLEN BACK TO 1997 LEVELS

Q. When forming a decision about buying a product or service from a particular company or organisation, how important is it that it shows a high degree of social responsibility?



Base: 1,011 GB adults 16+, 4th-10th September 2009; 1997-2008 c.1,000 GB adults 16+ each year. Asked face-to-face Source: Ipsos MORI

EUROPE

With much attention being given to the economy, the question of Europe has been given relatively little consideration in the last year. However, despite (or perhaps because of) its low profile, the European Parliament elections once again highlighted how little affection most Britons have for the European “project”.

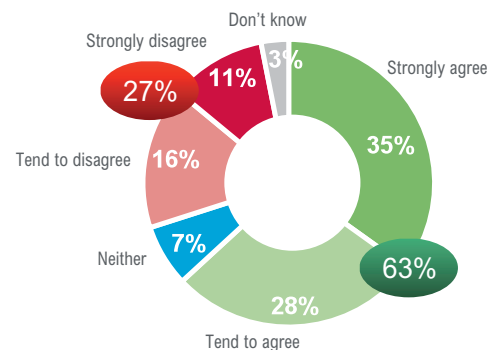
Turnout at the Euro-elections was a low 35% and it is clear that Europe remains a very low salience issue for most people. Indeed, in September 2008, only 1% of people said that Europe was an important issue facing Britain - the lowest we have recorded since January 1988. Even after the issue returned to prominence in the news with controversy over the ratification of the Lisbon Treaty, only 3% mentioned it as important in either October or November 2009. Neither is Europe seen as important when placed in an electoral context: in September 2009, only 3% of the electorate cited Europe as an important issue in helping them to decide how to vote in a General Election.

Attitudes towards the importance of Britain's membership of the EU are historically split. From 1977 to the present day, Ipsos MORI polls about whether Britain should 'stay in' or 'get out' of Europe have shown the electorate to be divided about the Europe issue, rarely swinging further than two-thirds in favour of one option or the other and usually remaining fairly evenly split.⁴⁹

Does the current economic climate mean that we now place more importance upon Britain's relationship with Europe than previously? Two-thirds of the public feel that in this time of international economic trouble, Britain's membership in the EU is more important than ever (63%), a third of whom strongly agree (35%)⁵⁰. By contrast, in 1978, when the economy was struggling due to high inflation, unemployment and industrial action, two-thirds of the public (64%) thought that Britain's membership of the Common Market had not made Britain more prosperous than it would have been. This difference in attitudes of course reflects Britain's changing relationship with Europe more generally, but it also suggests that despite the public's persistent lack of interest in the EU, a new recognition of the economic importance of Britain's place in Europe is apparent. Whether this will last beyond the immediate crisis given the public's apathy (if not outright antipathy) towards the European project remains to be seen.

THE RECESSION AND THE EU

In this time of international economic trouble, Britain's membership in the European Union is more important than ever.



Base: 1,017 British adults 18+, 17th-19th April 2009

Source: Ipsos MORI Political Monitor

SCIENCE AND BELIEFS

With the 150th anniversary of the publication of *The Origin of Species* and the 200th of Charles Darwin's birth, science has been much in the news over the last year. In particular, questions were raised over public trust and belief in science. A survey conducted for the Department for Business, Innovation and Skills found that more than half of the British public (56%) do not feel well informed about scientific developments.

Further, research conducted for Sense about Science, revealed that only a quarter of people (24%) describe scientific research as 'reliable', and just one in five (20%) say it can be described by the phrase 'undisputable facts'. (Though more positively, less than one in ten (9%) say it is confusing or contradictory, while just 5% see it as 'misleading').

However, despite maintaining some doubt about the veracity of some scientific research the overwhelming majority (82%) agree that "Science makes a good contribution to society".

Evolution and Creationism

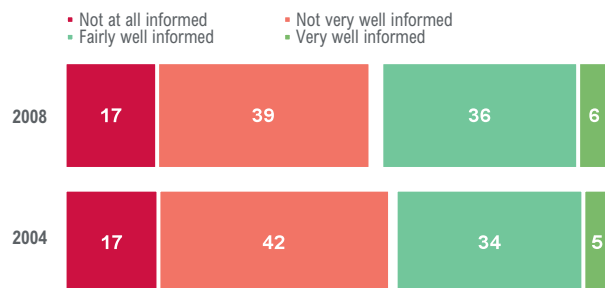
The Darwin anniversaries also raised questions over the public's views of evolution and creationism. In research conducted for the British Council, we found that there is a broad international acceptance of Darwin's theory of evolution in some form⁵¹. However, as the chart shows, there remains significant sympathy in Britain for at least some role played by God.

We also investigated teachers' views on the matter⁵². We found that nearly half (47%) of primary and secondary school teachers do not think that creationism should be taught alongside the theory of evolution and the Big Bang theory in science lessons in England and Wales; this rises to two in three (65%) science teachers. Nevertheless, more than a third of teachers (37%), and three science specialists in ten, take the contrary view.

But even among those who think creationism should not be taught, most feel it should be discussed in science lessons, views in line with DCSF guidance to schools on how to approach the theory of creationism within science lessons. So only 37% of teachers think creationism should be taught in science lessons, but 66% agree that it should be discussed.

THE PUBLIC DOES NOT FEEL INFORMED ABOUT SCIENCE...

Q. How well informed do you feel, if at all, about science and scientific research/developments?

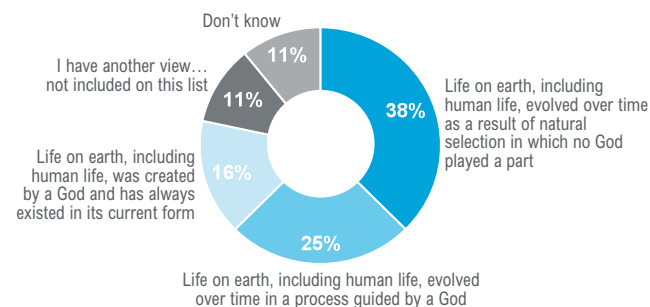


2008 Study – Base: 1,014 British adults, 11–16 December 2008
2004 Study – Base: 1,831 British adults, 20 September – 24 November 2004.

Source: Ipsos MORI/OST
Science & Society Survey

EVOLUTION OR CREATION?

Q. Listed below are a range of different views, which people may or may not have about the origins of species and development of life on earth. Which of these comes closest to your own view?

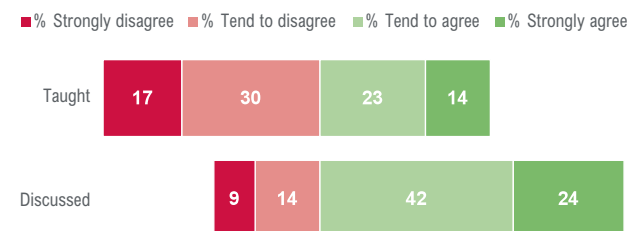


Base: 973 GB adults 18+, 3–9 April 2009

Source: Ipsos MORI/British Council

CREATIONISM IN SCHOOLS – VIEWS OF TEACHERS

Q. To what extent do you agree or disagree that, alongside the theory of evolution and the Big Bang theory, creationism should be...TAUGHT in science lessons?...DISCUSSED in science lessons?



Base: 923 primary and secondary school teachers in England and Wales, Source: Ipsos MORI Teachers Omnibus 5 November–10 December 2008

NEW MEDIA AND THE DIGITAL DIVIDE

New media and technology are likely to play as big a role in 2010 as they have in previous years. Already there have been debates about, for example, the possibility of e-petitions to force parliamentary bills, the role of the BBC's online operation, the launch of www.data.gov.uk, and we've seen more local authorities appoint social media officers. Ipsos MORI's own Technology Tracker⁵³ allows us to monitor trends in the uptake of ICT. In January 1997, just 5% of the population had access to the Internet at home. By the spring of 2001, this had risen to 28% and is now at 67%. At

the same time, the use of broadband connections has risen from just 8% in January 2003 to 64% most recently.

However, despite the remarkable increase in the number of people accessing information online, the fact remains that 29% of UK households have never had access to the Internet. We are already witnessing a digital divide, which will continue to grow as the rate of take-up slows and those who are left behind represent the hardest to persuade to switch. Women, lower social grades and older people, especially pensioners, are less likely to be online - and these factors are cumulative: at the end of 2008, only 11% of DEs aged over 65 were internet users – yet this is one of the groups most dependent on public services. The commitment to switch a range of public services to exclusively online facilities, outlined in the 2009 Digital Britain White Paper, therefore poses a significant problem for these demographic groups.

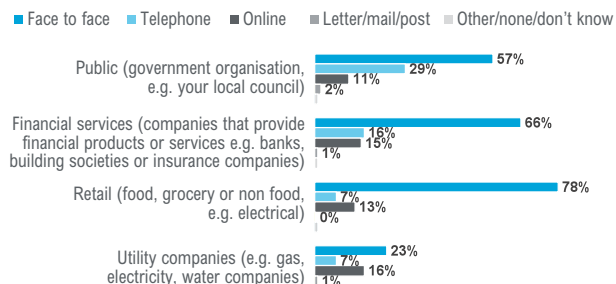
However, it is not only digital exclusion which is an obstacle to expanding e-government and the facilities available through new media. The vast majority of the public still prefer to deal face-

to-face with organisations. Nearly three in five people prefer to deal with public sector organisations face-to-face (57%), whilst 66% of those dealing with financial institutions and 79% of those dealing with retailers also prefer personal contact.

It seems that people are not necessarily abandoning old information technologies and strategies but instead are adding new media to their portfolio of activities. As previously mentioned, we have seen a significant increase in use of the internet, but research alongside this suggests that conventional media are as popular as ever. According to Ipsos MORI Real Trends, 89% of people watch television or listen to the radio for news at least most days and 53% of people read a newspaper at least most days. Radio may be less important than television as a news source, but it remains the single most popular way in which consumers find out about new music artists, both here and abroad – 69% cited it as their chief source in a cross-national survey by Ipsos MediaCT.⁵⁴ Our study makes it clear that, although the world is changing and people can access and consume content from an ever-widening number of sources, people still use a variety of media – old as well as new - to inform them about new products and services. Furthermore, support is divided over potential plans to use the internet to increase transparency in public services: while 41% would support, for example, publishing on the internet all NHS spending over £1,000, 39% would oppose it – which suggests that while new technology will provide more and more innovative ways of changing and improving government and public services, it will not be the only answer.

CONTACTING CUSTOMERS

Q. For each of the following types of organisation, please tell me whether you would prefer to deal with them face-to-face, on the telephone, online, or in some other way?

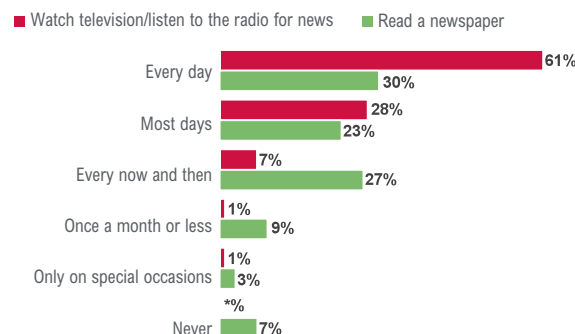


Base: 1,013 GB adults aged 18+, 21-23 August 2009

Source: Ipsos MORI/Vertex

INFORMATION SOURCES

Q. How often, if ever, do you do each of the following?



Base: 2,019 GB adults aged 15+, 9 May-5 June 2008, self-completion and online

Source: Ipsos MORI Real Trends Service

ENDNOTES

- 1 Our most recent voting intention trends can be found at <http://www.ipsos-mori.com/researchpublications/researcharchive/poll.aspx?oltemld=107&view=wide#2009>
- 2 2009: 12,076 adults aged 18+, January-December 2009. 2005: MORI Election Aggregate based on 15,948 interviews.
- 3 September 2009 Political Monitor, 1,003 British adults 18+, 25th-27th September 2009.
- 4 <http://www.ipsos-mori.com/researchspecialisms/socialresearch/specareas/politics/trends.aspx>
- 5 September 2009 Political Monitor, 1,003 British adults 18+, 25th-27th September 2009.
- 6 Ipsos MORI poll for the Daily Mirror, 10-11 December 2008, conducted by telephone among 1,007 British adults aged 18+. Details at <http://www.ipsos-mori.com/researchpublications/researcharchive/poll.aspx?oltemld=2318>
- 7 Further details of this trend data at: <http://www.ipsos-mori.com/researchpublications/researcharchive/poll.aspx?oltemld=22&view=wide>
- 8 November Political Monitor: 1,006 British adults 18+, 13th-15th November 2009.
- 9 Ipsos MORI Political Monitor, April 2009: 1,011 adults aged 18+ by telephone on 17-19 April 2009. Details at <http://www.ipsosmori.com/researchpublications/researcharchive/poll.aspx?oltemld=2329>
- 10 Policy Exchange, 2,000 adults aged 18+, 9th-15th January 2009.
- 11 Government Equalities Office/ Ipsos MORI, 1,049 adults in Great Britain aged 16+, 6-8 February 2009.
- 12 Our Economic Optimism Index findings since 1977 can be found on our website. See <http://www.ipsos-mori.com/researchpublications/researcharchive/poll.aspx?oltemld=43&view=wide> for figures from 1997 to date, with links to earlier data.
- 13 To access our long term political trends from the 70s, visit: <http://www.ipsos-mori.com/researchpublications/researcharchive/poll.aspx?oltemld=2449=wide>
- 14 Ipsos MORI interviewed a representative quota sample of 2,023 GB adults aged 15+ on 4-10 September 2009 on behalf of The Royal College of Physicians. Interviews were conducted face-to-face, in-home. Data were weighted to the profile of the population. <http://www.ipsos-mori.com/researchpublications/researcharchive/poll.aspx?oltemld=2478>
- 15 Ipsos MORI/ BBC, 1,001 British adults, 29th-31st May 2009.
- 16 Ipsos MORI/ News of the World, 1,021 British adults 18+, 17 April 2009.
- 17 Ipsos MORI research for the BBC, conducted by telephone on 29-31 May among 1,001 British adults aged 18+. Details at <http://www.ipsos-mori.com/researchpublications/researcharchive/poll.aspx?oltemld=2349>
- 18 December Political Monitor, 1,017 British adults 18+, 11-13 December 2009.
- 19 December 2004 Political Monitor, 2-6 December 2004. Trend data since 2002 can be found at <http://www.ipsos-mori.com/researchpublications/researcharchive/poll.aspx?oltemld=61&view=wide#2009>
- 20 Ipsos MORI/ Hansard Society, Audit of Political Engagement, 1,051 adults aged 18+ in Great Britain, 11 - 17 December 2008.
- 21 BBC Trust, Standards Review Study - *Taste, Standards And The BBC: Public Attitudes To Morality, Values And Behaviour In UK Broadcasting*, 7-25 March 2009, 2,206 UK adults aged 16+, <http://www.ipsos-mori.com/researchpublications/publications/publication.aspx?oltemld=1260>
- 22 Ipsos MORI Public Spending Index: 1,006 British adults aged 18+, 13th – 15th November 2009.
- 23 Ipsos MORI Survey of MPs, 110 MPs interviewed 8th June – 31st July 2009, <http://www.ipsos-mori.com/Assets/Docs/Polls/poll-ipsos-mori-survey-of-mps-2009.pdf>
- 24 Ipsos MORI Public Spending Index: 1,006 British adults aged 18+, 13th – 15th November 2009.
- 25 Ipsos MORI Public Spending Index: 1,004 GB adults, 19-21 June 2009.
- 26 Omnibus survey carried out by Ipsos MORI for the County Surveyor's Society. 1,945 British adults aged 16+ were interviewed face-to-face between 10-16 July 2009. Results are weighted to the national profile.
- 27 The biennial Place Survey replaces the BVPI General Users Satisfaction Survey and is a requirement for all English local authorities. Fieldwork for the Place Survey was carried out from September to December 2008, and results were published by CLG during the course of 2009. The survey asks for residents' views about a number of local quality of life and service satisfaction issues, and measures 18 citizen perspective indicators from the National Indicator Set.
- 28 It is possible to track performance against the BVPI General Users Satisfaction Survey 2006/07, noting the possible impact questionnaire changes will have had on results in 2008/09.
- 29 The 7-strand index is a combined measure of ASB, calculated by allocating scores to the responses to the questions about the seven anti-social behaviours. Where a particular type of ASB is deemed a very big problem, it is given a score of 3, whereas, a score of zero is given where it is deemed not a problem at all. A total score for each respondent is calculated based on the responses to the seven questions. The maximum possible score is 21. High perception of ASB is a score of 11 or above.
- 30 See, for example, our *Understanding Society* report on *Perils of Perception and People, Perceptions and Place*.
- 31 Ipsos MORI Issues Index, normally conducted monthly. Detailed trends are available at <http://www.ipsos-mori.com/researchpublications/researcharchive/poll.aspx?oltemld=56&view=wide#2009>
- 32 For details about the British Crime Survey visit <http://www.homeoffice.gov.uk/rds/bcs1.html>
- 33 Please see Closing the Gaps http://www.ipsos-mori.com/DownloadPublication/11_sri_crime_closing_the_gaps_012008.pdf
- 34 The survey was commissioned by Channel 4 to coincide with its drama *The Execution of Gary Glitter*, broadcast on 9 November. A nationally representative quota sample of 967 British adults (aged 15+) were interviewed face-to-face on Ipsos MORI's regular Omnibus survey (Capibus) on 10-16 July 2009. Data were weighted to the demographic profile of the population.
- 35 Extended Schools Survey of Parents, January 2009.

- 36 Ipsos MORI conducted the fifth annual National Student Survey, in which 223,363 students participated between January and May 2009, an overall response rate for the UK of 62%. A total of 155 higher education institutions across the UK and 117 further education colleges in England took part. The NSS is conducted by Ipsos MORI and commissioned by HEFCE on behalf of the other funding bodies.
- 37 Ipsos MORI Issues Index, normally conducted monthly. Detailed trends are available at <http://www.ipsos-mori.com/researchpublications/researcharchive/poll.aspx?oltemID=56&view=wide#2009>
- 38 G James Rubin, Richard Amlôt, Lisa Page and Simon Wessely, "Public perceptions, anxiety, and behaviour change in relation to the swine flu outbreak: cross sectional telephone survey", *BMJ* 2009;339:b2651, http://www.bmj.com/cgi/content/abstract/339/jul02_3/b2651
- 39 On behalf of the Fawcett society and UNISON, Ipsos MORI interviewed a representative sample of 1,055 British adults aged 16+ by telephone on 2-4 October 2009. Data are weighted to match the profile of the population. <http://www.ipsos-mori.com/researchpublications/researcharchive/poll.aspx?oltemID=2506>
- 40 On behalf of EHRC, Ipsos MORI interviewed a sample of 414 working and non-working Muslim women by telephone between 26 February-9 March 2009. Data are weighted to match the profile of Muslim women in the Labour Force Survey. <http://www.ipsos-mori.com/researchpublications/researcharchive/poll.aspx?oltemID=2357>
- 41 Smell the Coffee: A wake-up call for the Conservative Party. Michael A. Ashcroft 2005.
- 42 1,040 interviews, face-to-face, between 7 August – 7 September 2009.
- 43 Ipsos MORI Issues Index, normally conducted monthly. Detailed trends are available at <http://www.ipsos-mori.com/researchpublications/researcharchive/poll.aspx?oltemID=56&view=wide#2009>
- 44 The deliberative discussions involved 270 householders from nine communities in England, Wales and Northern Ireland.
- 45 *The Congestion Challenge* – an Ipsos MORI report for the RAC - can be downloaded from <http://www.ipsos-mori.com/researchpublications/publications/publication.aspx?oltemID=1284>. 995 British adults aged 16+ were interviewed face-to-face between 12-16 June 2009. Data were weighted to the national profile.
- 46 A nationally representative quota sample of 1,011 British adults aged 16+ was interviewed throughout Great Britain on the Ipsos MORI Omnibus, across 157 sampling points. Interviews were carried out using CAPI (Computer Assisted Personal Interviewing), face-to-face in respondents' homes between 4 and 10 September 2009. Data have been weighted to reflect the known national population profile. <http://www.ipsos-mori.com/researchpublications/researcharchive/poll.aspx?oltemID=2505>
- 47 A nationally representative quota sample of 1,059 British adults aged 16+ was interviewed throughout Great Britain on the Ipsos MORI Omnibus. Interviews were carried out by telephone on 9-11 October 2009. Data have been weighted to reflect the known national population profile.
- 48 Ipsos MORI Winter 2009 surveys among Business and Financial Journalists (85 interviews) and MPs (190 interviews).
- 49 For trends see: <http://www.ipsos-mori.com/researchpublications/researcharchive/poll.aspx?oltemID=2439&view=wide>
- 50 Ipsos MORI Political Monitor, April 2009; 1,017 British adults aged 18+, 17th – 19th April 2009.
- 51 The research interviewed over ten thousand adults across ten countries worldwide: Argentina, China, Egypt, India, Mexico, Russia, South Africa, Spain, Great Britain and the USA.
- 52 The survey was conducted as part of the Ipsos MORI Teachers Omnibus. A representative sample of 923 primary and secondary school teachers in England and Wales were interviewed on 5 November-7 December 2008.
- 53 Ipsos MORI Technology Tracker interviews 1,000 people month face-to-face, at home. Data were weighted to reflect the national population profile.
- 54 Ipsos MediaCT interviewed 6,500 people on-line between January and March 2009 in Great Britain, the USA, France, Germany, Italy, Spain, Brazil, Russia, China, Japan, India and the United Arab Emirates.

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About Ipsos MORI's Social Research Institute:

The Social Research Institute works closely with national government, local public services and the not-for-profit sector. Its 200 research staff focus on public service and policy issues. Each has expertise in a particular part of the public sector, ensuring we have a detailed understanding of specific sectors and policy challenges. This, combined with our methodological and communications expertise, ensures that our research makes a difference for decision makers and communities.