



# 2008/09

## In Perspective

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# What does the future hold?

The signs are ominous both for ordinary consumers and businesses, and for the Labour and Conservative parties. The last few months have seen an unprecedented rise in concern about the economy among the public – but so far concern about unemployment is still at an historic low. For most of the 1970s, 1980s and 1990s, public anxiety about unemployment averaged around 40%, and periodically hit highs of over 80%. Today it remains at only 24%. In one sense so far then, despite pain on the High Street, and the majority of companies and consumers in our surveys saying they are cutting spending, we are still at the “phoney war” stage of recession. We know it is coming, and yet for many it is still about media panic as much as real pain – the next few months will be a wake-up call, especially for those who have grown up since the mid-1990s and experienced only growth in public and private spending.

For both main parties, 2009 also looks tough. 2008 was David Cameron’s year until the banking crisis of the Autumn saw Labour “back in the game” as Gordon Brown now again was able to regain some initiative. He avoided assassination by his own party, but is well behind the Conservatives. Labour now face an almost impossible struggle to win an historic fourth term, with prospects of abject misery in government if they do, as public debt mounts to unparalleled levels and creates a drag in emerging from the very recession it has striven to mitigate. For the Conservatives, the situation is challenging: they benefit from the steady “drip, drip” of bad news stories. But even if they win handsomely, the tough medicine they will be forced to administer could mean a victory like Mrs Thatcher’s in 1979 – who rapidly became as unpopular as Gordon Brown at his worst, and would have lost the election in 1983 if not for the Falklands Factor.

In general, Britain remains not at all happy with itself. Although concern about crime and immigration have fallen from the peaks they hit in 2007, they remain historically high: 63% agree that Britain is “broken”, and 84% that young people have too much freedom and not enough discipline – including most young people themselves who, as concern about knife crime hits new peaks, are the age group most worried of all. We have seen a surge in nostalgia as people retreat to past certainties after the bubble has burst, with a doubling of those who believe Britain was better in the past.

Reasons to be cheerful? Well one thing is certain – recessions end. Moreover, British happiness seems largely unaffected by the state of the economy – over the last thirty years, the proportion who are happy with their lives has never varied much. It makes us all value our friends and families more – who turn out to be the true source of happiness.



**Ben Page**

Chairman, Ipsos MORI Social Research Institute

# The credit crunch and government

Let's start with money. A credit crunch in international money markets, stock market collapse and subsequent 'bailouts', and effective nationalisation of a succession of High Street banks, ensured that economic concerns rose dramatically in 2008. By September, a majority of the British public (55%) cited the economy as among the key issues facing the country, more than any other issue. This rose from around one in ten at the start of 2008, a level that had broadly remained unchanged over the previous decade.

There was growing pessimism about the economy's future. In November 2008, most (68%) of the public felt that the economy would deteriorate, with only one in four (17%) feeling it would improve. But this collective pessimism was much worse than people's estimates of their own situation where only 39% expected to be worse off in the next year, and 45% expected no change.

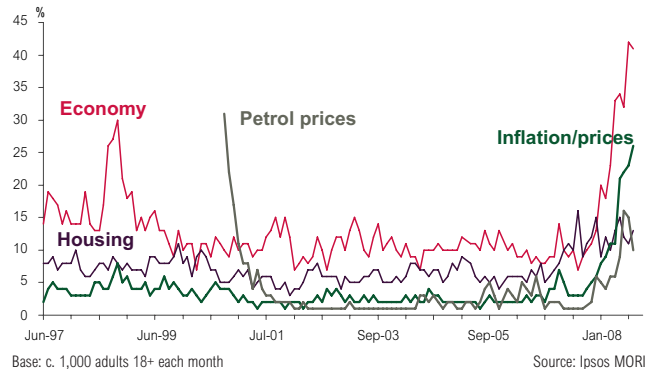
One small crumb of comfort for the Government is that such pessimism is not confined to Britain. In our April 2008 Global Advisor survey (an online survey of the public in countries around the globe), 70% of Americans and 87% of the French were worried about the social and economic situation in their country, just as 75% of Britons were worried.

While Prime Minister Gordon Brown and Chancellor Alastair Darling have received some credit for their handling of the economic crisis, the British public's long-standing mistrust of government and politicians shows no sign of receding. Seven in ten (71%) do not trust the Government to tell the truth, and half of the public (48%) do not trust the Government to act in the country's best interests.

Politicians retain their perennial status as one of the groups people are least likely to trust – only 22% trust Government Ministers and 18% trust politicians generally. This compares to over half of the public (52%) trusting the ordinary person in the street – but everyone (92%) trusts their own friends!

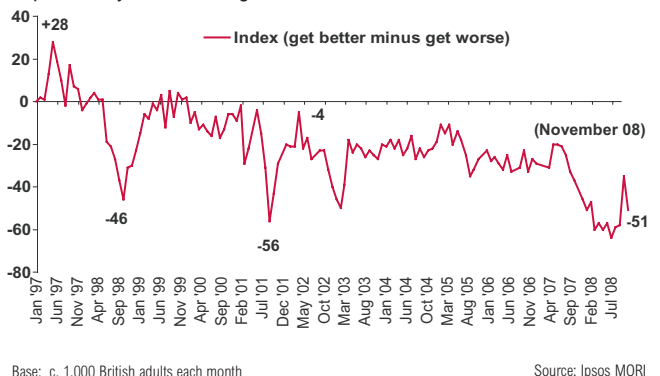
## More see the economy as an important issue facing Britain

- Q. What would you say is the most important issue facing Britain today?  
Q. What do you see as other important issues facing Britain today?



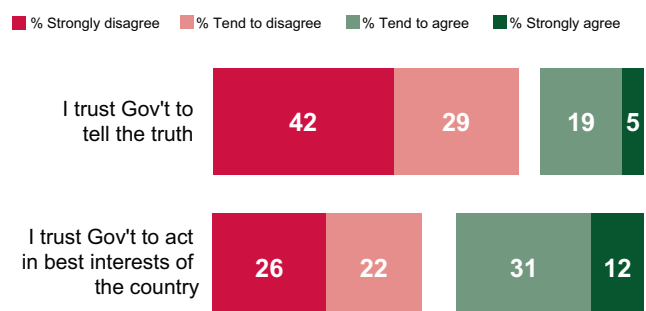
## The Ipsos MORI economic optimism index

- Q. Do you think that the general economic condition of the country will improve, stay the same or get worse over the next 12 months?



## Government trust and influence

- Q. On balance, do you agree or disagree with each of the following statements?



Base: 1,012 British adults, 7-9 March 2008

# The economy, stupid

The economic downturn seems to be affecting many people's optimism, but their behaviour less so (so far). There has been a substantial rise in the number believing that "It is important for me to save for the future" (83% agreed this Spring in 2008, compared to 67% in 2003).

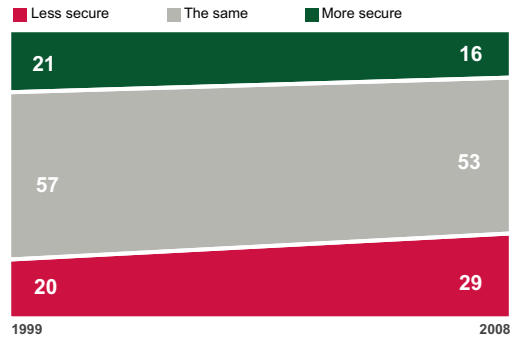
As one might expect there is growing public unease about personal financial security. In contrast, however (and another example of what we term 'cognitive polyphasia', the psychologists' term for holding mutually exclusive ideas in ones mind simultaneously), more people now agree than did 10 years ago that 'tomorrow will take care of itself'. This idea that 'immediate enjoyment' deserves a priority over patience and planning has likely contributed to the unprecedented borrowing seen in the UK and US over recent years. Indeed a third of people say they intend to get through the next few years by simply borrowing still more, a strategy the government itself endorses!

In addition, it is clear that we are living in what pundits continually refer to as a 'global village'. Heard the one about the Englishman, the Scotsman and the Welshman ...? Putting the jokes aside, with devolved government now a reality across Britain, it is no longer enough for organisations to test the political climate by polling Westminster MPs. Members of the Scottish Parliament at Holyrood, and Members of the Welsh Assembly have distinct views on a host of issues, and of course have the power to translate many of these opinions into legislation. As the second round of our studies among Members of the Three Houses approaches, giving authoritative insight into the views of the leaders of Britain, we look back to some highlights of the 2007 research.

Views of the economy illustrate some of the stark differences between the Houses. Last autumn, Westminster MPs were most pessimistic, with over half thinking that the economy would get worse over the following year, and only 5% thinking it would improve. By contrast, MSPs in Holyrood and Welsh Assembly Members were much more positive about prospects for the economy, with 45% and 36% respectively saying it would improve.

## Financial security

Q. Compared to this time last year, is your financial position more or less secure or has it stayed the same?

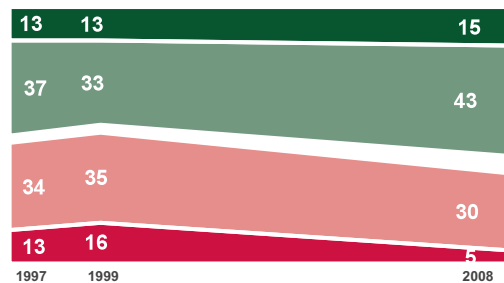


Base: 2,019 British adults, 9 May-5 June 2008

## Hedonistic functionalism

Q. The important thing is to enjoy life today; tomorrow will take care of itself

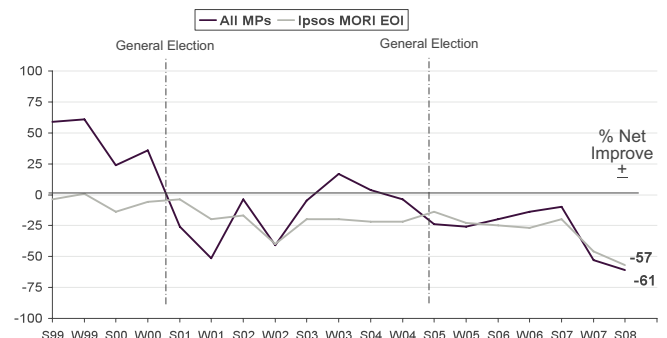
% Strongly disagree % Tend to disagree % Tend to agree % Strongly agree



Base: 2,019 British adults, 9 May-5 June 2008

## Prospects for the economy - trends

Q. Do you think that the general economic condition of the country will improve, stay the same or get worse over the next 12 months?



Base: All MPs asked

Source: Ipsos MORI MPs Survey

# The political world

The political world has spun round in the same way the economic one has. In January 2008, the Conservatives led, albeit by one point – 38% compared with Labour's 37%. By September 2008, the Conservative share was a record 52% of all those certain to vote and Labour trailed them on 24%, a lead of 28 points, as confidence in the Government sank.

Then events intervened. The financial meltdown saw Gordon Brown able to regain the initiative and demonstrate the two qualities that our research has always found to be important for Prime Ministers – being good in a crisis and a capable leader – on his own home ground: the economy. The Conservatives were marginalised as Brown and Darling took the reins in addressing the economic situation, and this leadership led to a series of boosts in the polls. But in 2009, Labour has sunk back as bad news continues, and the future looks bleak for many Labour MPs.

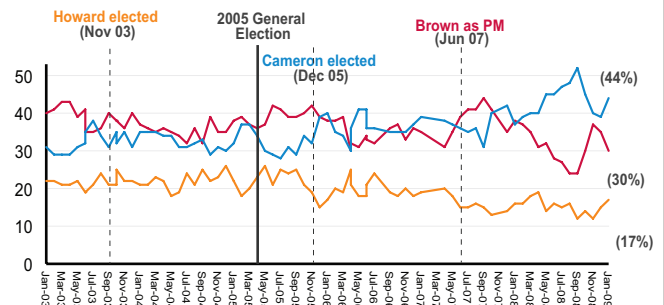
From our qualitative and quantitative research it became clear that the abolition of the 10p starting rate of income tax was the key factor that put people off the Labour party – after April, when this came into effect, the Conservative share of the vote started to reach dizzying new heights: at 40% of all respondents in May. This was the highest since just after John Major was winning general elections.

By August, 58% agreed that "the Conservatives are ready to form the next Government". Brown's perceived lack of conviction was the second most-cited reason to dislike him (12%) in September after his 'untrustworthiness' (13%).

Will Gordon Brown make another Lazarus-like recovery? Now the immediate crisis is over, and the depressing roll call of redundancies becomes louder, Labour will probably find the "time for a change" factor unstoppable.

## Voting intentions Jan 03 – November 08 (all certain to vote)

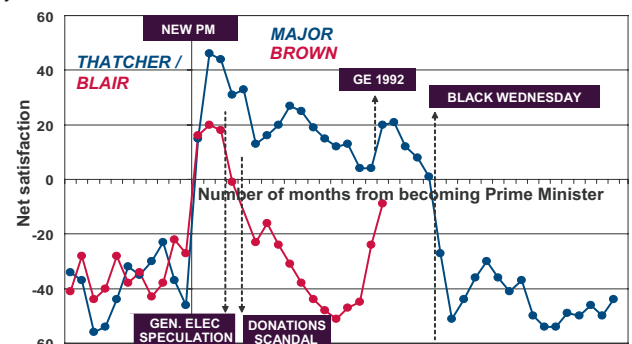
Q. How would you vote if there were a General Election tomorrow?



Base: c. 1,000 British adults each month through June 2008; c. 500 British adults thereafter  
Source: Ipsos MORI Political Monitor

## Brown's second bounce...

Q. How satisfied or dissatisfied are you with the way... is doing his/her job as Prime Minister?

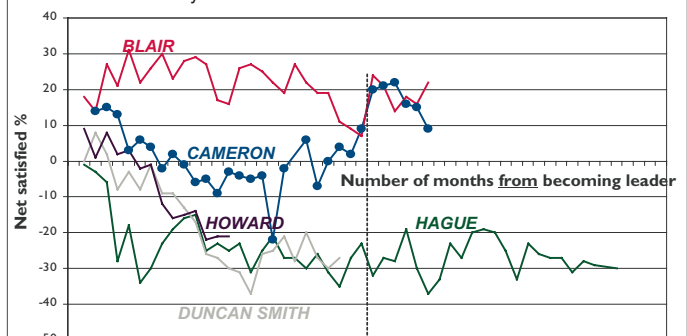


Base: c. 1,000 British adults each month

Source: Ipsos MORI Political Monitor

## The rise of David Cameron

Q. How satisfied or dissatisfied are you with the way... is doing his job as leader of the... Party?



Base: c. 1,000 British adults interviewed 3rd week of the month

Source: Ipsos MORI Political Monitor

# The leaders of the party

Leaders matter. By July 2008, 19% of the public said they liked Cameron but disliked the Conservatives, while only 8% took the opposite view of liking the party while disliking its leader, giving Cameron a "net effect score" of +14. Brown's score, calculated on a similar basis, was -52! Worse, only 28% disliked both Cameron and the Tories, while 44% disliked both Brown and Labour.

When we asked the public in April 2008 (in a poll for Christian Aid) to choose the three celebrities from a list they would like in a quiz team with them, Gordon Brown (27%) scored well ahead of David Cameron (20%). But neither were as popular as Alan Sugar (41%), Terry Wogan (36%) or JK Rowling (35%). Indeed, Brown's experience was the most cited (10%) when we asked the public in September 2008 what his best qualities were.

Economic experience is the best quality a Prime Minister can have at a time of economic unrest. In August, 15% more felt that the Conservatives had the best policies on the economy. After the "bailout" in October things changed, with 11% more trusting Brown and Darling to run the economy than Cameron and Osborne, but this has now evaporated.

The economy will be the issue that decides the next election. For the first time ever, it is now the most important issue facing Britain – 66% see it as either one of, or the most important issue. What is clear is that we are going back to the economic concerns which dominated Britain in the 1970s and 1980s. In fact, if one takes a very long term view, one could argue the last decade was 'odd'. Concern about unemployment has been the key issue for so much of the last three decades, and is still at historically low levels, although it is rising fast.

## Gordon Brown: personality & party

Gordon Brown	Like Labour	Dislike Labour	TOTAL
Like Brown	18%	11%	29%
Dislike Brown	21%	44%	-65%
TOTAL	+39%	-55%	-52%

Source: Ipsos MORI Political Monitor

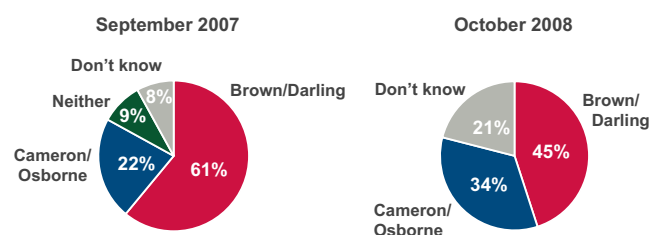
## David Cameron: personality & party

David Cameron	Like Conservative	Dislike Conservative	TOTAL
Like Cameron	35%	19%	54%
Dislike Cameron	8%	28%	-36%
TOTAL	+43%	-47%	+14%

Source: Ipsos MORI Political Monitor

## Fewer than half trust Brown/Darling in the economic crisis

Q. Who do you most trust in the current economic crisis. Gordon Brown and his Chancellor Alastair Darling, or David Cameron and his Shadow Chancellor George Osborne?



Base: 1,000 British adults, 27th-28th September 2007

Base: 1,004 British adults, 17th-19th October 2008  
Source: Ipsos MORI Political Monitor

# Broken Britain

Alongside the financial and political situation, 2008 saw a lively debate among the “chattering classes” over whether society and/or Britain is broken. Despite Boris Johnson disagreeing and saying it was “piffle”, most people agreed with David Cameron that it was (63%). Behind this was a mixture of issues centred on rising concern about crime, young people and disorder, binge drinking, dysfunctional families, and a potent media narrative. Some 84%, including most young people themselves, agreed that young people had too much freedom and not enough discipline, up from 72% in 1997. However, if Britain is truly broken, we would expect to see a serious decline in personal well being at a societal level. But British levels of happiness have not changed much for 30 years – either we have always been “broken”, or the issues are more specific to certain communities.

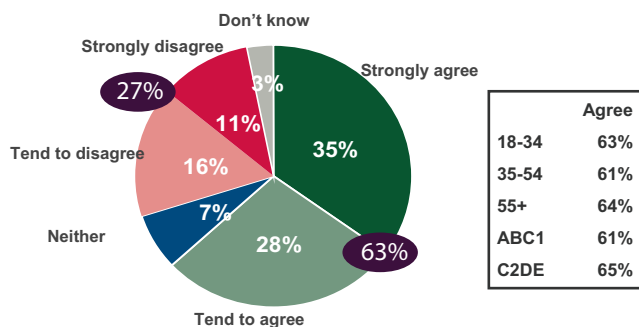
Why are we so much more pessimistic about Britain overall than the facts would seem to justify? Part of the answer is the mass media - sometimes fanned by an aggressively adversarial party political system. This helps to explain how most people are able to believe that crime or immigration or the NHS is not a big issue where they live while simultaneously believing that the same issues are out of control in the country as a whole.

So while most of us seem pretty content with our own lives, we are ready to go along with the collective pessimism - and the recession will only accentuate this.

Despite some signs that social mobility may be improving, the enduring strength of class distinction and class structure is clear. Most people agree there will never be a classless society in Britain and the proportions believing that “In this country the best people get to the top whatever start they’ve had in life” (49% agreeing, 44% disagreeing) are identical to 1991. The Conservatives’ critique of “big” government’s ineffectiveness can be supported in some ways by the unchanging proportion of people who feel “society is not run to help people like me” – although active disagreement is falling, something Labour would take succour from. In the poorest wards in Britain, ratings of quality of life have risen as millions have been spent, even while most people in Britain believe the country is getting worse (71% in 2008).

## Two thirds agree British society is broken

Q. To what extent do you agree or disagree that British society is broken?



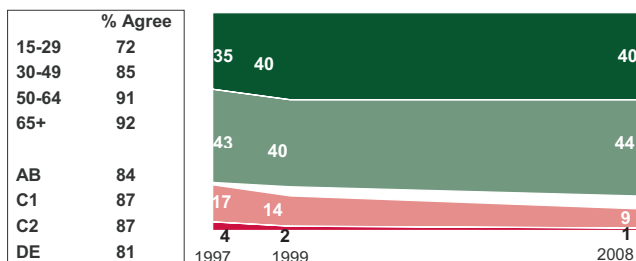
Base: 1,017 British adults 18+, 12-14 September 2008

Source: Ipsos MORI Political Monitor

## A majority think British teenagers need more discipline

Young people today have too much freedom and not enough discipline

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

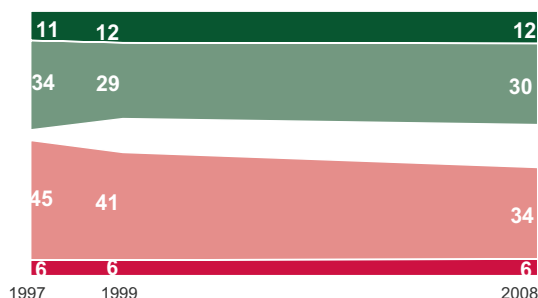


Base: 2,019 British adults, 15+, 9 May-5 June 2008, self-completion and online

## ... a suspicion of the Establishment

Society is not run to help people like me

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



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

# The rise in crime concern

Billions more have been spent on crime since 1997. However, despite this investment, public concern about crime, law & order and anti-social behaviour continues to climb, peaking in 2007 with the murder of Rhys Jones. This underlines one of the key factors of the 'concern about crime' trendline to the right: its peaks and troughs often correlate with specific individual events which are covered extensively by the media.

The public sees crime as mostly about offending by young people (26%), lenient sentencing (22%), too much violent crime (18%) and too much anti-social behaviour (18%). The public repeatedly ask for more police presence, harsher punishments for offenders and more guidance for parents. The challenge facing the CJS is that even though some of these have happened, no-one believes them, so it is not translating into an increase in confidence.

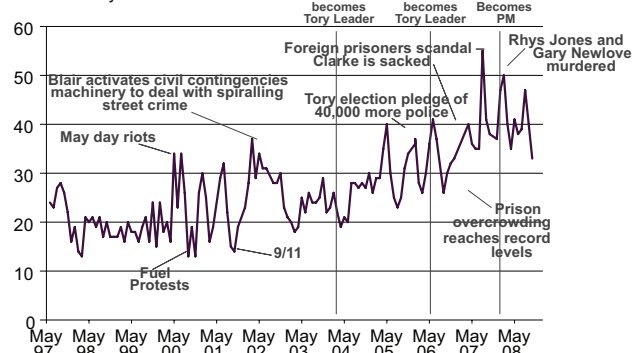
The local versus national picture is particularly interesting. People are far more likely to think that the national picture is far gloomier than for their local area. Indeed, they are far more likely to be worried about the issue of knife and gun crime nationally than to worry about it where they live. This is the effect of 'signal crimes' which receive extensive media coverage and, despite being out of proportion with the facts, are very influential on the public.

Data from our Real Trends study also shows that despite increased police presence in the UK, and falls in crime in the British Crime Survey, the public's rating of their physical security has remained relatively unchanged over the past nine years, with over a third (36%) agreeing that they are 'really frightened about going out these days' due to violence.

Whoever wins the next General Election, persuading the British that crime is under control will be a real challenge.

## Issues facing Britain: crime / law and order

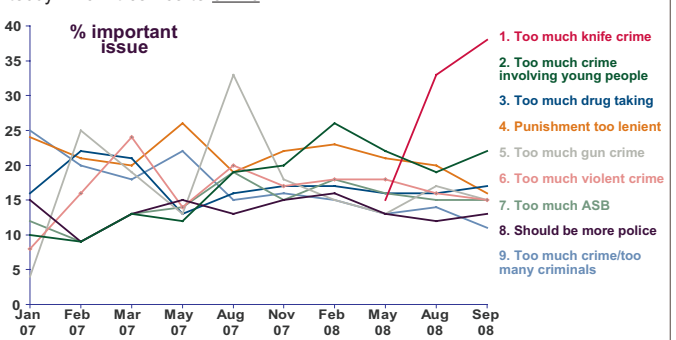
Q. What do you see as the main/other important issues facing Britain today?



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

## Most important issues when it comes to crime

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

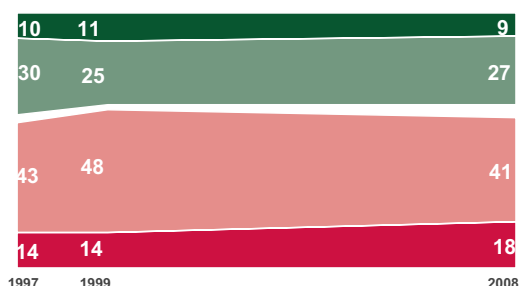


Base c.1,866 adults aged 16+ in England and Wales, Jan 07-Sep 2008  
Issues with a response of more than 10% are presented

## Physical insecurity

I'm really frightened about going out these days. There is so much violence about.

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



Base: 2,019 British adults, 9 May-5 June 2008

# Multiculturalism: a nation at ease with itself?

What defines 'Britishness' remains a hot topic, and in 2008 we found the Government even musing the idea of a 'British' bank holiday that would celebrate all things British. Debate continues as to whether multiculturalism has enriched British identity or led to segregated communities with little in common. In Autumn 2008 the Conservative Shadow Home Secretary launched an attack on multiculturalism, saying it had encouraged extremism and downplayed traditional British culture.

By a slim margin, the British public seem to be moving closer to the Conservative view, with 41% saying that Britons should share a common culture and set of values. Fewer (37%) agree that Britain should celebrate the diversity of cultures and values among its different groups, while nearly a third are on the fence. Coupled with this is a growing trend of Britons who do not feel it is important to respect the wishes of minority groups, up from 14% in 1997 to 24% this year. While still in a minority, these opinions point to a public loosening its embrace of multiculturalism. Furthermore, in a poll for the BBC marking the 40th anniversary of Enoch Powell's 'Rivers of Blood' speech, 24% feel there is a 'great deal' of tension between people of different races and nationalities, and 52% think there is a 'fair amount' of tension. Only four percent think there is no tension at all.

A discussion about multiculturalism can often become a discussion about immigration. A majority of Britons feel that 'parts of the country don't feel like Britain anymore because of immigration'. More now believe, however, that their local area does not feel like Britain, with 25% saying this compared to 12% in 2005. Nearly half believe that the Government should encourage immigrants to return to their country of origin, although 43% disagree.

However, not all signs point to a continuing hostility to immigration. Though 59% say there are too many immigrants in Britain, this is the lowest number agreeing since 2001, and shows a marked decrease from the 68% who said so in November 2007. Additionally, fewer people identify themselves as prejudiced towards different races: one in five now say this compared to one in four in 2005.

## Multiculturalism

Q. Please read each pair of statements and decide which comes closest to your own opinion

1

2

3 / NA

4

5

Agree much more with A

Agree much more with B

We should celebrate the rich diversity of cultures and values between different groups in Britain

We should share a common culture and set of values in Britain



Base: 2,019 British adults, 9 May-5 June 2008

## Ethnic/cultural toleration

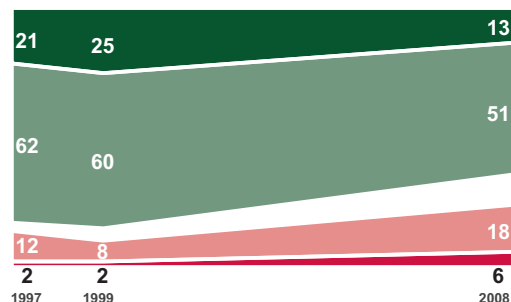
Q. It is important to respect the wishes of minority groups

% Strongly disagree

% Tend to disagree

% Tend to agree

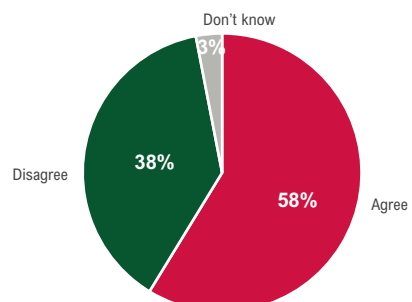
% Strongly agree



Base: 2,019 British adults, 9 May-5 June 2008

## Not like Britain anymore?

Q. Do you agree or disagree with the following statement? "Parts of this country don't feel like a Britain any more because of immigration"



Base: 1,000 British adults, 11-13 April 2008  
Source: Ipsos MORI/BBC

# Nostalgia

In an era of economic crisis, terrorism, and fast-paced technological change (64% say the world is changing too quickly), it is perhaps not surprising that a majority of Britons look back with nostalgia to previous years. Most (71%) believe that people were happier in simpler times, when they had fewer problems facing them. This has increased dramatically from 1999, when just over half (51%) felt this way.

Britons are now more likely to see 'the old days' as less complicated, when more people were happier, and it seems that more, superficially at least, yearn for a remembered past.

Tradition still matters. Close to nine in ten (87%) say traditions are instrumental to society, with 30% strongly agreeing. Furthermore, many feel it is important that the British remain distinct from other nationalities. A slim majority (52%) feel a unique British identity is worth preserving. Coupled with a craving for a simpler, happier time, is the public worried about facing the future or simply hoping to take the common sense approaches of tradition and history with them into the future?

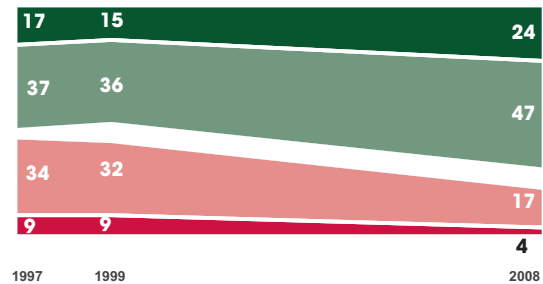
For example, believing that other people spend too much time worrying about safety is closely correlated with believing that traditions are a significant part of society. Does this point to the perception that traditional, common sense approaches are a means to a less stressful future?

However, one might argue that habeas corpus, or the right not to be imprisoned without charge, is a longstanding British tradition. Yet when Conservative Shadow Home Secretary David Davis resigned his seat in protest at the Government's extending the limit of holding terrorists without charge to 42 days, almost half said he was wrong to do so, while 39% said he was right. Does this, instead, show that the British public is ready to take measures that compromise tradition to face what they perceive as a more complicated, scarier world?

## Nostalgia for a simpler age

Q. People led happier lives in the old days when they had fewer problems to cope with

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

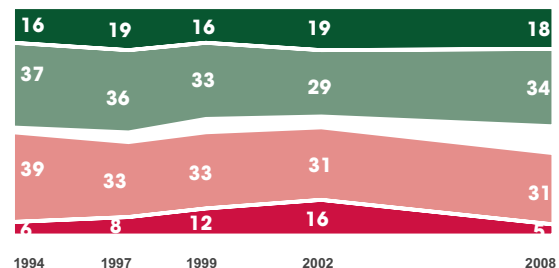


Base: 2,019 British adults, 9 May-5 June 2008

## Pride in Britishness

Q. It is important that the British remain very different from all other nationalities

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

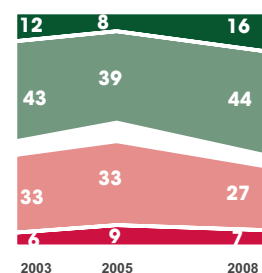


Base: 2,019 British adults, 9 May-5 June 2008

## Traditional commonsense

Q. People spend too much time worrying about safety\*

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



\* Asked as "People spend too much time worrying (about safety of food, cars, etc)" in 2003-5

Base: 2,019 British adults, 9 May-5 June 2008

# Climate change: does it matter?

Whilst the environment has been around as an issue for a long time, it remains unclear how the economic turbulence of 2008 will have an impact on green behaviours and those trying to promote them. Will people be more responsive to messages about sustainability which could fit with changes in lifestyle and spending habits, or is an economic downturn the wrong time to be preaching the green message?

What is clear is that during 2008 only one in ten of us currently saw the environment as a key national issue relative to the economy or crime. This has changed very little recently, with the exception of the peak of 19% in early 2007 coinciding with the publication of the Stern Report and the 4th report of the Intergovernmental Panel on Climate Change.

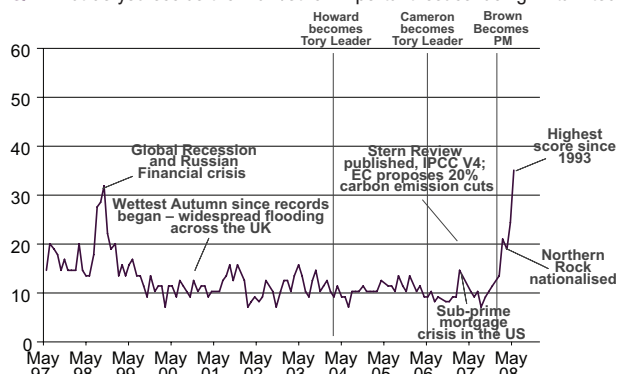
Neither consistent coverage of climate change nor the onset of the credit crunch has shifted the British public's fundamental viewpoint that economic and environmental considerations should be given equal weight. The latest survey, for Natural England in March 2008, showed that almost three in five (58%) take this view. However, it is evident that slightly fewer now feel that the environment should take precedence over the economy (30% in 2008 compared to 38% in 1997).

Of course, if asked directly, the public do express concern about climate change. In May 2008 three-quarters said they were concerned about climate change. But the same research shows doubts remain – 42% agree with the statement that climate change might not be as bad as people say, while 60% agree that scientific experts are still undecided on how much humans are contributing to the problem.

Doubts about climate change, rather than outright denial, are a key feature of attitudes in 2008. The huge challenge remains how government “nudges”, pushes or shoves the public to take action or waits for the market to change its behaviour.

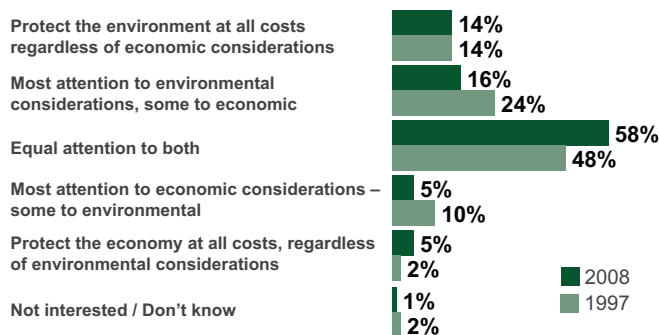
## Issues facing Britain: economy & environment

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



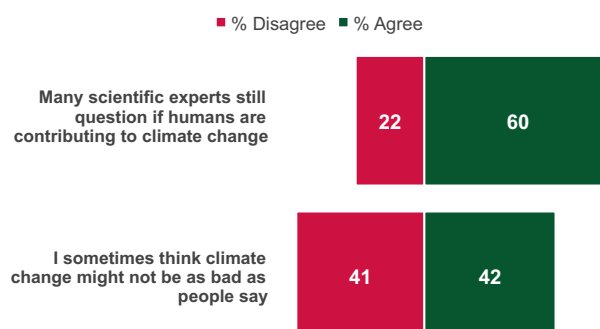
## Trends in public attitudes on environmental vs. economic concerns

Q. Here are some statements about the balance between economic and environmental considerations. With which one of these do you agree most?



## Uncertainty about science and impact

Q. To what extent do you agree or disagree that...?



# Climate change: action

Given the fact that many people remain to be convinced about the impact of climate change, it is not surprising that society is not taking the action necessary to mitigate it.

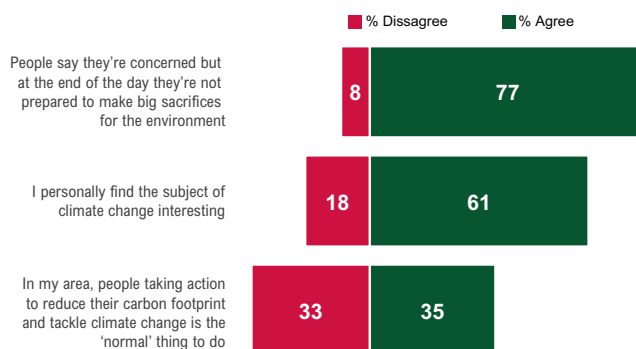
While many people talk the talk, most of us would still rather fly and drive than walk the walk. Over three-quarters agree people say they are concerned about the environment but are not prepared to make big sacrifices for it. Moreover, only around one in three agree that reducing carbon footprints and tackling climate change are “normal” things to do, suggesting much work remains to be done to establish low carbon lifestyles as the social norm. Still, and despite talk of 2008 representing the year of “green fatigue”, three in five people still say they find the subject of climate change interesting.

Turning to perceptions of individual responsibility, the vast majority of the British public do now accept they have a part to play in tackling climate change. The challenge for government is convincing the public of the need to go beyond basic behaviours towards more systematic change. Currently, close to one in four believe their individual responsibility should only involve recycling and basic home energy saving measures. Three in five (60%) acknowledge the need to go further, but only 13% are prepared to make radical changes in the things they buy and how much they fly and drive.

Government policy on climate change is itself under the spotlight, with opposition to certain measures and suspicion of the motives behind “green” taxes, in particular. The research suggests government has work to do here, although ‘ring-fencing’ green tax revenues may offer the best solution. Support for green policies, such as a national road pricing scheme, are heavily contingent on how the revenues are spent. For example, opposition to road charging swings to support if revenues are used to lower the price of petrol and road tax, or – most popular of all – if they are spent improving public transport.

## Personal interest and social norms

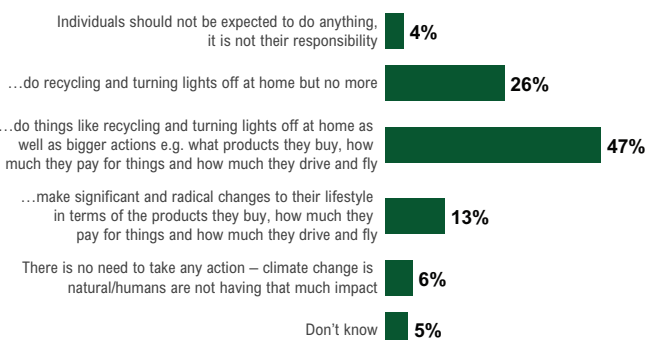
Q. To what extent do you agree or disagree that...?



Base: 1,039 GB adults aged 15+, interviewed f-2-f and in home, 23-29 May 2008

## Taking action & individual responsibility

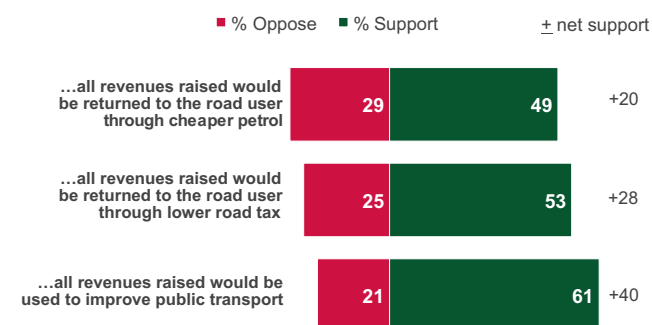
Q. Thinking about what is reasonable to expect people to do to tackle climate change, which one of the following statements best describes your opinion?



Base: 1,039 GB adults aged 15+, interviewed f-2-f and in home, 23-29 May 2008

## The importance of hypothecation

Q. How strongly would you support or oppose road charging if...?



Base: 1,039 GB adults aged 15+, interviewed f-2-f and in home, 23-29 May 2008

# Cars & congestion

In 2007, 1.9 million people signed the Downing Street petition against road pricing, in 2008 congestion charges in both London and Manchester made the news.

Transport was one of the two main issues on which voters decided in the London Mayoral election in May (only crime/policing was of comparable impact). It was an issue which polarised Londoners. The Congestion Charge was the reason most cited at the end of 2007 to explain their views by those who were dissatisfied with Mayor Livingstone, but his traffic policies were also the most common reason for satisfaction with him among those taking the opposite view.

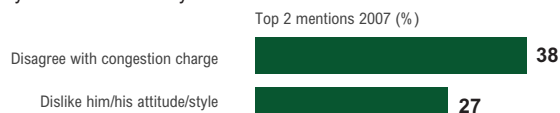
Most (69%) British adults see congestion as a major problem where they live and more than half think it's getting worse. In local studies, congestion is repeatedly cited as a key quality of life issue.

Our research shows people largely accept the need for action to address climate change but aren't keen on fiscal measures, especially taxes, road tolls and charges to dissuade car use and "gas guzzling". At the same time of course, these are precisely the measures government may need to use to change people's behaviour and prevent gridlock. The public say that better buses would make them less likely to use their cars. In practice, simply improving bus services in London, without the Congestion Charge, would not have had the same effect.

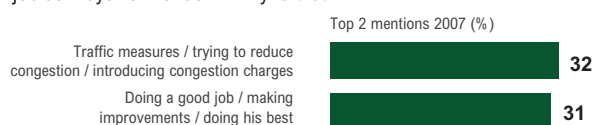
The challenge here is leadership – transport is yet another policy area where government, rather than offering exactly what people want, will need to persuade and lead a fractious public at the same time. The Manchester Referendum on congestion charging followed all other similar referenda - the public said 'no' despite hating congestion.

## A positive and a negative for Ken

**Q. You said you are dissatisfied with the way Ken Livingstone is doing his job as Mayor of London. Why is that?**



**Q. You said you are satisfied with the way Ken Livingstone is doing his job as Mayor of London. Why is that?**

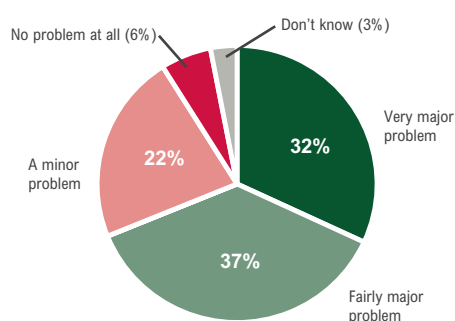


Base: All dissatisfied with the Mayor 2007 (309)  
Base: All satisfied with the Mayor 2007 (626)

Source: Ipsos MORI / GLA Annual London Survey

## Congestion considered a problem

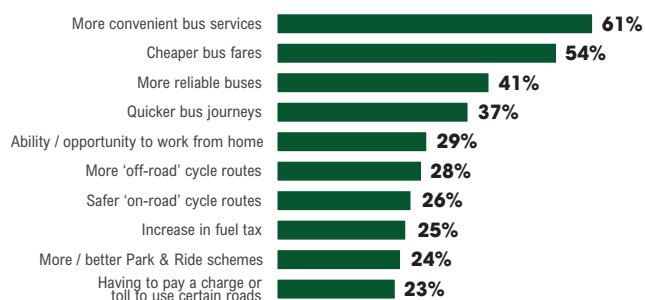
**Q. During peak times, how much of a problem would you say road congestion is in the area 5 miles around where you live?**



Base: 2,044 British adults, 18-23 October, 2007  
Source: Ipsos MORI for County Surveyors' Society

## Reducing car use

**Q. Which, if any, of these would make you less likely to use your car as much as you currently do?**



Base: Postal surveys of 27, 682 English adults (33 local authority areas), 2-27 June 2008  
Source: Ipsos MORI for National Highways Best Value Benchmarking Club

# How much should government do?

The British public's views of the future of public services remained broadly pessimistic throughout 2008. Despite billions of investment and millions of hours of effort, by September 2008, three in five (61%) did not believe government's policies would improve the state of Britain's public services and were, if anything, more likely to feel Conservative policies would be better – even if they did not really know what they were, and despite rising user satisfaction with key services like the NHS. Clearly, the state of politics as a whole has a major impact on public views (rather than user views) about public services at the national level.

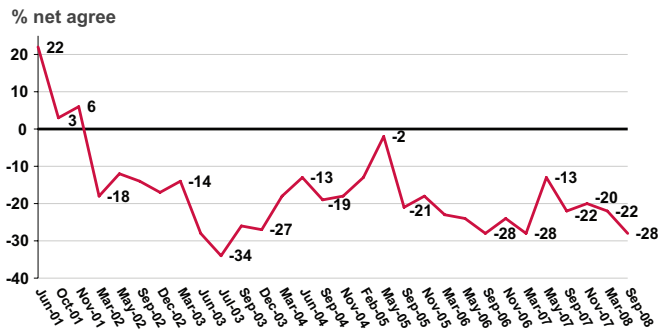
As the debate about the balance of power between national and local institutions dragged on, so too did the evolving debate over the extent to which government should intervene in people's behaviour. The public want people to be responsible for making their own decisions about health and welfare rather than rely on the state to intervene (48%): only one in five (20%) believe that the state should take responsibility and protect people from their own mistakes.

This underlines the debate that will take place in the next few years over how far the state should intervene. While 29% think that, in an ideal society, collective solutions are best, slightly more think that individuals should look after themselves (37%), and the rest are somewhere in between. Similarly we find that the public want both guarantees of the same public service standards everywhere along with local flexibility. There is no clear consensus in many areas of public policy – hence the debate between Left and Right.

One thing that the public do broadly agree on is the public service ethos, and a suspicion of private provision of public services. In June, 79% agreed that "In principle, public services should be run by the government or local authorities, rather than by private companies", unchanged from the 78% who said the same in 2001. Despite scepticism about private sector involvement however, most people will cheerfully use private medical care paid for by the NHS if it means they get treated faster.

## Confidence in the Government's policies for public services has fallen to the same level as the end of Blair's tenure

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

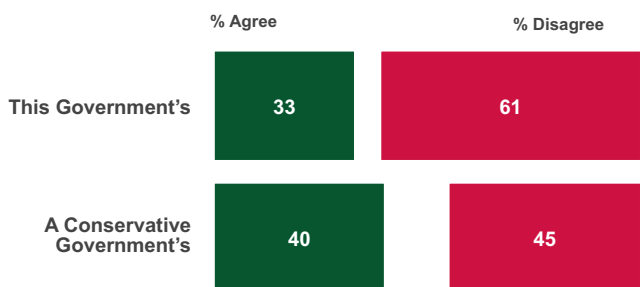


Base: c.1,000 British adults

Source: Ipsos MORI Social Research Institute Delivery Index

## Who has the best long-term policies for public services?

Q. On balance, do you agree or disagree that in the long term policies of... will/would improve the state of Britain's public services?

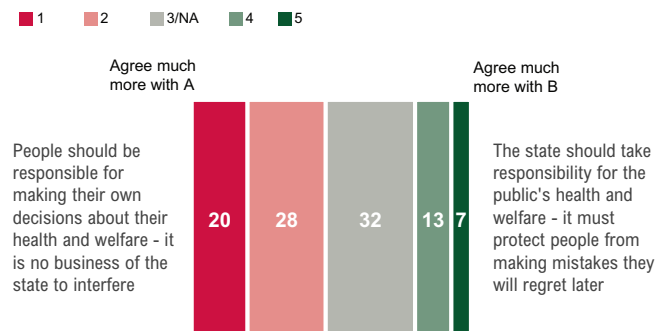


Base: 1,017 British adults, 12-14 Sept 2008

Source: Ipsos MORI Social Research Institute Delivery Index

## The nanny state

Q. Please read each pair of statements and decide which comes closest to your own opinion



Base: 2,019 British adults, 9 May-5 June 2008

# The NHS at 60

As the NHS was celebrating its 60th birthday, the number of people citing it as a key national concern was the lowest it had been for over 20 years. Tracking for the NHS itself shows rising levels of patient satisfaction, as waiting times hit historic lows. The public's pessimism of 2006 has ebbed away. But today, while more people still think the NHS will decline rather than improve, the trend over the last year has been very positive, even if it does not benefit central government.

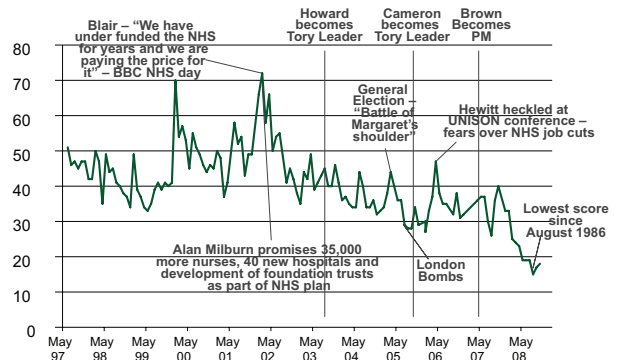
Can these positive trends continue? The service has seen massive investment, but the rate of increase is now slowing sharply.

More importantly, the last year has seen a growing debate about the sustainability of the NHS model, which the public is deeply loyal to (around three-quarters consistently agree that it is so important we must maintain it whatever the cost). Media stories on drugs such as Herceptin have been around for some time. But the debate ratcheted up in 2008 with the focus on whether patients should be allowed to make top up payments. This gets to the heart of how the NHS responds to demands beyond what it can afford.

Politicians have been reticent to enter into this debate, but there are voices from within the sector raising these questions. For instance, Sir Michael Rawlins at NICE argued in August "Countries do not have infinite sums of money to spend on health. ... The debate is not about whether - but how - healthcare budgets can be most fairly shared out among a country's citizenry." Here, the polling evidence is ominous: nearly three-quarters of people believe the NHS should provide all drugs no matter what they cost. It will not be able to. That's a lot of people who are going to be disappointed. To fend this off, this is a debate the NHS urgently needs to begin.

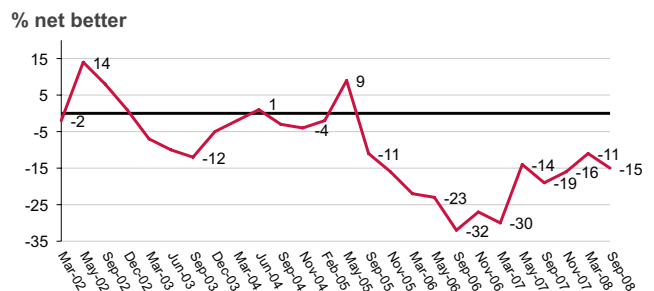
## NHS is a far less pressing concern than a decade ago

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



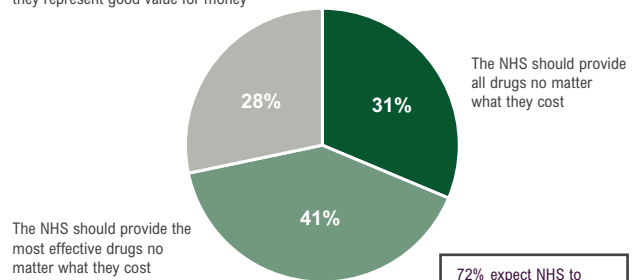
## Public views of the NHS: now stabilising after recovery?

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



## The challenge now is from rising public expectations

The NHS should provide the most effective drugs and treatments provided they represent good value for money



Base: British public, 18+ (1,001) 12-17 January 2006

# Empowered & happy?

One of the themes of New Labour has been “empowerment”, with initiatives that have touched just about every policy area. There are many benefits claimed for empowerment: it is seen to result in better services – local people know best what is needed in their areas – but it is also claimed to increase community cohesion, individuals’ skills and confidence, and trust in local and national government. But does it actually work? This is harder to answer than it might seem – a number of extensive reviews have all concluded that it probably does, but that it can’t be proved.

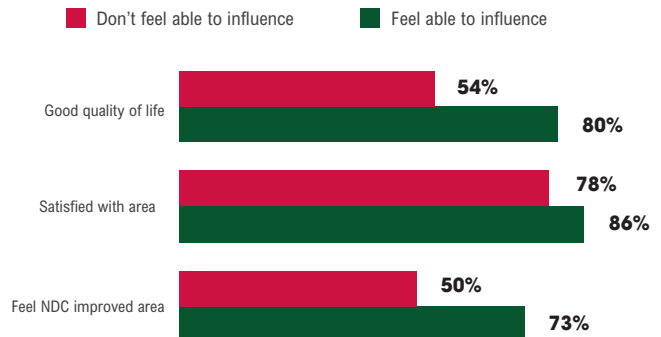
Our report this summer – *Searching for the Impact of Empowerment* – attempts to address this. Those people who feel they can influence local decisions or have been involved in local activities do tend to be more positive – on how satisfied they are with living in the area, their views of their own quality of life, their feelings of community and trust in local organisations.

But feelings of empowerment or actual involvement are not the most important factors for these key outcomes – other things like feeling safe, not having problems with gangs, drugs or vandalism and knowing your neighbours are more strongly related to how happy people are with their areas and local agencies. So in terms of priorities, dealing with ASB might have more impact – but achieving that will need some community engagement!

There are also a number of local areas that appear to be models of empowerment, with widespread feelings of influence – but poor results on other attitudes; for example, when we plot the relationship between feelings of influence and satisfaction with the area, there is clearly very little relationship between the two. While empowerment is important, it is no guarantee of overall satisfaction, or improved quality of life.

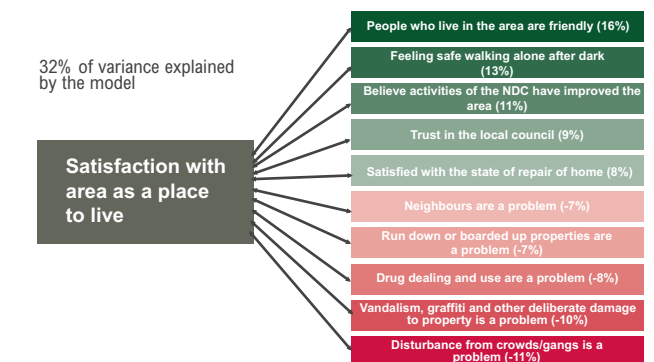
Analysis shows that feelings of influence are more important than actual involvement in local activities. It is this measure of “subjective empowerment” that is more related to positive perceptions of the area and services – confidence that one can make a difference if one wants to – that public services need to focus on.

## Influence vs. contentment with local area



Base: 15,792 residents aged 16+

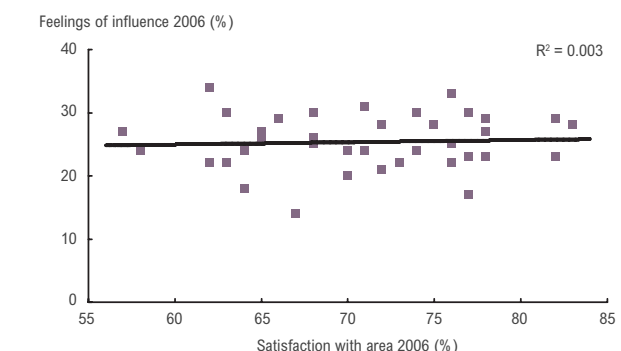
## Key drivers of satisfaction with area as a place to live



Base: 15,792 NDC residents aged 16+

Source: NDC Survey 2006

## Influence vs. satisfaction with area



Base: 15,792 NDC residents aged 16+

# What do we believe?

So how are the British public reacting to the current period of uncertainty?

One of the challenges facing government, as it seeks to debate difficult choices with the public, is their general level of distrust. Most (63%) agree they feel more and more remote from big political institutions (a level that has remained broadly unchanged over the last ten years). Lack of trust in government and politicians is widespread, and has been for decades.

This lack of trust in authority continues to manifest itself in a variety of ways. In a survey for the BBC in January 2008, 24% said they believed that Princess Diana's death was the result of a conspiracy rather than accident, and 30% that "evidence of UFO landings is being hidden from the public". A majority of the public (55%) also believes that alternative health treatments have "a lot to offer people nowadays".

Trust in official information does vary depending on the subject matter, however. In the same survey for the BBC in January 2008, around three-quarters would trust government advice on the effects of smoking (77%), speeding (76%) and alcohol and drugs (72%). The level of trust, however, dropped to around one in four (26%) believing government advice on the impact of immigration and two in five (42%) trusting advice on their and their children's diet.

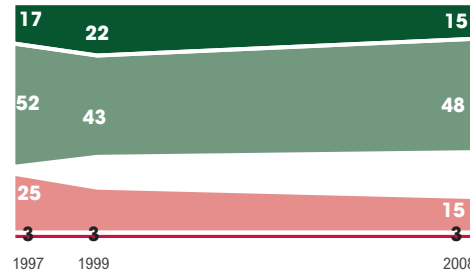
The lack of trust is not confined to the public sector. More than four in five (83%) feel that most companies care more about profits than they do about customers.

At the same time, trust matters - if government wants people to do the right thing, it needs to be believed. We see exactly the same pattern in our communications practice: brands that are more trusted find their advertising spend gets much greater return on investment than those that are less credible.

## Distrust in institutions continues

Q. I feel more and more remote from the big political institutions

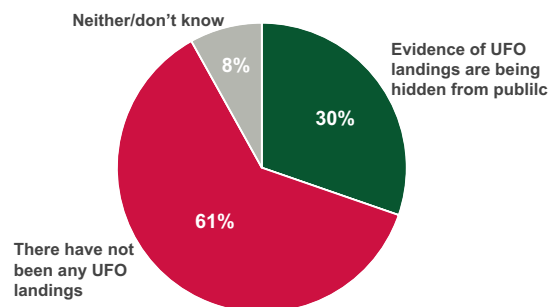
■ % Strongly disagree ■ % Tend to disagree ■ % Tend to agree ■ % Strongly agree



Base: 2,019 British adults, 9 May-5 June 2008

## The government and UFOs

Q. On balance do you believe that... or...?



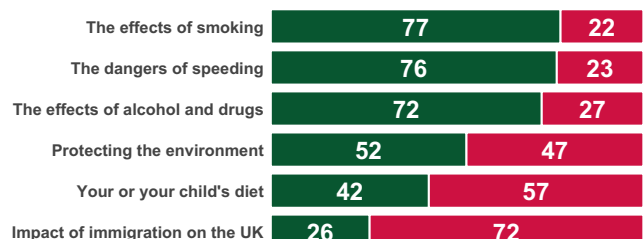
Base: 1,070 GB residents 18+, 3-6 January 2008

Source: Ipsos MORI/BBC

## Trust in government advice

Q. Which of the following would you trust the government's advice on?

■ % Yes ■ % No



Base: 1,070 UK adults age 16+, interviewed 3-6 Jan 2008

Source: Ipsos MORI/BBC

# Feral beasts?

The media - and broadcasters in particular - are most people's main source of information. But how much confidence does the public have in the media? Does it empower the public to make their own decisions? Perhaps not: our Real Trends survey in May-June found that only 25% agree that "The media present a balanced view of Britain today". Furthermore, 58% believe that "The media are responsible for people being pessimistic about Britain", but they still read/watch/listen to it, of course!

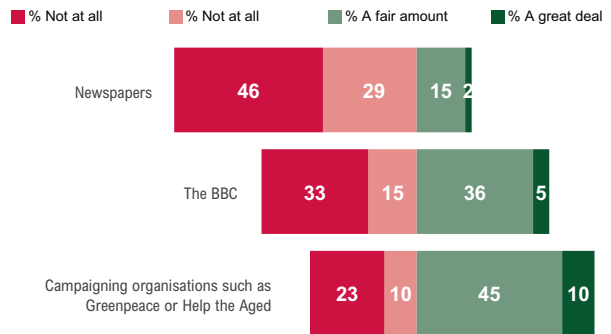
However, there is a clear distinction when we consider institutions - distrust of the press runs deep, but the BBC stands out as more trusted than the rest of the media "to act in your best interests". Yet, even though we found trust in the BBC marginally higher than in 2003, it is less trusted than "campaigning organisations such as Greenpeace or Help the Aged", who of course just might have their own agenda to pursue.

With political uncertainty and much debate in an age of proliferating digital media, the BBC's future is still uncertain and public opinion of real significance. Ipsos MORI research for *MediaGuardian* in August found BBC1 the most frequently chosen as favourite TV channel, and when the public were asked to spontaneously name their favourite programme, three of the top five were BBC programmes. But support for the current funding arrangements is less clear cut: 41% agree the licence fee is an appropriate way of funding the BBC but 37% disagree, and only a third think the licence fee provides value for money with more who (47%) disagree. Since that survey, the Corporation's standing may have worsened, with a "Brand image" problem and its highest-paid star suspended.

Arguably the biggest challenge to the BBC, and the rest of the British media, is the Internet. Two-thirds of the public (63%) say that they regularly access the Internet for information. It may be, therefore, that the most significant media event of 2008 has been the continuing success of the BBC's iPlayer (launched in mid-2007), the "old" media colonising the new - and eating its bandwidth!

## Trust in the media

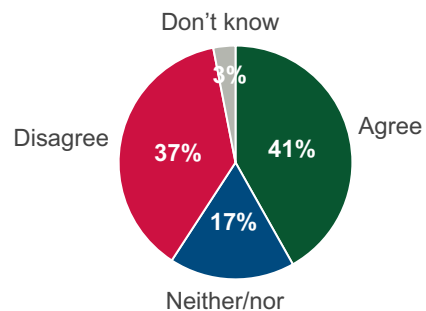
Q. How much do you trust each of the following to act in your best interests?



Base: 2,019 British adults, 9 May - 5 June 2008

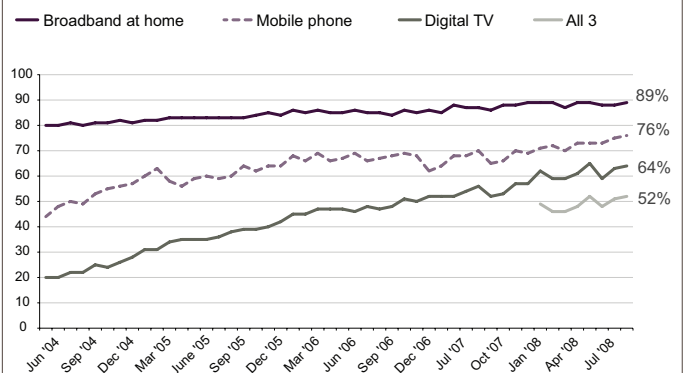
## The BBC and the licence fee

Q. Please tell us the extent to which you agree or disagree with the following statement, using the scale provided:  
I believe the television licence fee is an appropriate way of funding the BBC



Base: 2,021 British adults aged 15+, 1-7 August 2008

## Convergence trends



Ipsos MORI Technology Tracker June 2004 - September 2008. Base: circa 2,000 interviews per month

# Jobs for all?

Whilst the knock-on effects of the credit squeeze became more pronounced in the financial markets in the early part of 2008, the effects on the UK labour market are only gaining momentum now.

Numerous media houses and some analysts were quick to predict an avalanche of redundancies in all sectors at the outset. Our findings show this was more confined to private sector organisations, who also adopted a more calculated and reactive approach in tackling this. Hence redundancies were regarded as a last resort in the failure of alternative cost-saving measures.

The good news is, that while recruitment intentions among employers have continued to decline, it has to date not been on the scale originally anticipated, especially during an alarming period of higher inflation as a result of record oil prices.

However, our findings show there has been a marked increase in redundancy with a corresponding decline in recruitment. Three-quarters (75%) of organisations are planning to recruit in the next three months, down from 81% in Summer 2008 and 86% in both Spring 2008 and Winter 2007/08. A decrease for the second successive quarter suggests that the current economic uncertainty has now started to have a direct impact on recruitment intentions.

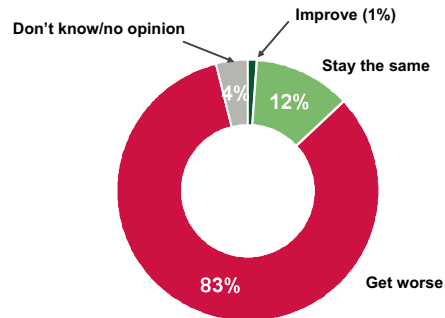
The initial "wait and see" attitude adopted by most employers in reaction to the crisis is slowly waning with employers now bracing themselves to face tough decisions over the coming year. About 26% of organisations surveyed predicted redundancies in the three months to Christmas, compared to 27% in the previous quarter. While this is still higher than in Spring 2008, it still falls way short of the 38% recorded in Winter 2007/08 when the global crisis became prominent.

Interestingly the focus for intended redundancies and recruitment was to maintain existing workforce levels, rather than to reduce staff headcounts.

When asked what the overall effect of this recruitment and redundancies will be, a third (34%) of organisations say it is to maintain total staff levels. One in five (20%) say recruitment and redundancies will increase staff levels, while a quarter (18%) say they will decrease staff levels.

## Gloomy economic outlook

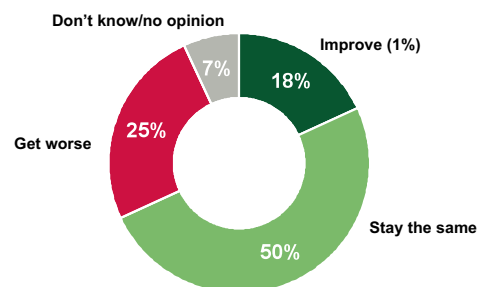
Q. Over the next three months, do you think the general economic condition of the country will...?



Base: 721 CIPD members, fieldwork dates 4th - 26th September 2008

## ...but slightly more optimism for organisational performance

Q. Over the next three months, do you expect the financial performance of your organisation will...?

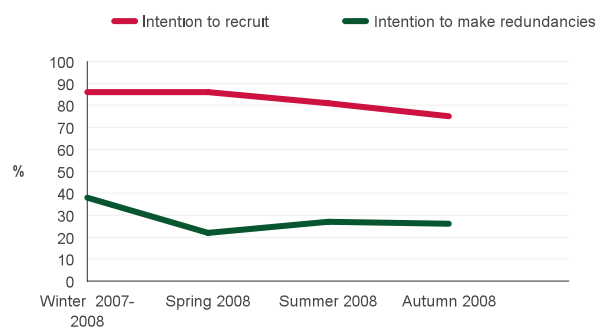


Base: 721 CIPD members, fieldwork dates 4th - 26th September 2008

## Recruitment intentions decline

Q1. Is your organisation planning to recruit in the next three months?

Q2. Are you planning to make any redundancies during the next three months?



Base: 721 CIPD members, fieldwork dates 4th - 26th September 2008

# Playing around

On a less serious (but no less important) note, the ongoing technological revolution continues to transform our leisure activities – though it remains to be seen how well an industry, whose marketing seems to depend on constant novelty and built-in obsolescence, will cope with a recession. Resistance to the computer age has weakened over the last decade (50% now agree “I like trying out new things on computers”), and an appreciable part of the public now take technology for granted (37% agree that “I cannot imagine life without the Internet” – mostly the young, of course). So perhaps spending on high-tech amusements will be the last sector to suffer any consumer squeeze.

Not that new technology is entirely without its critics. The number who think that “technical progress is destroying our lives” has fallen sharply, but one in four still believe this; and many more remain cautious. 2008 will surely be remembered as the year when we could barely go for a week without a new case emerging of the government or its contractors having lost or inadvertently revealed personal data about members of the public. Little wonder that 81% agree that “I do not trust the government to maintain my privacy if it collects personal details about me”. Yet the government wants to collect, for security reasons, even more intimate details of our private lives. Something, somewhere, is going to have to give.

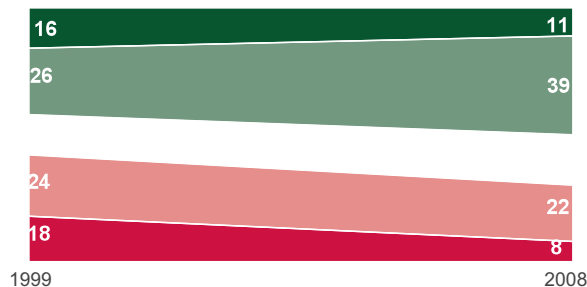
But 2008 will also be remembered for an unaccustomed wealth of British sporting success – a flood of gold medals in Beijing, Lewis Hamilton’s F1 world championship, an all-English Champions League final, a Grand Slam final for Andy Murray which may perhaps be the first of many... and the rejuvenation of the England football team under Fabio Capello after its enforced summer off.

It’s funny to think that just a year ago, before the failure to qualify for the European Championship finals was confirmed, England fans (in a poll for the Sun) were telling us that the main reason why the team was struggling was that the players were not good enough. Oh, and their most popular choices to replace Steve McClaren, should he resign, were Jose Mourinho and Sam Allardyce. It all seems a very long time ago.

## Cyber-enthusiasm

Q. I like trying out new things on computers

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

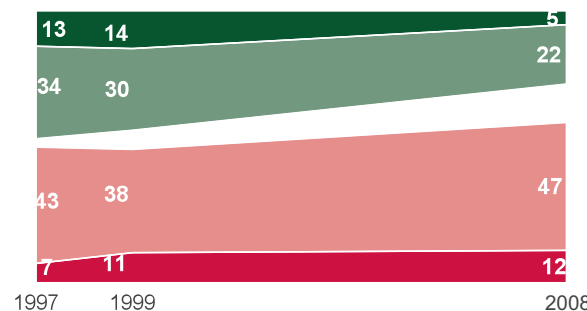


Base: 2,019 British adults, 9 May-5 June 2008

## Technophobia in decline

Q. I fear that technical progress is destroying our lives

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



Base: 2,019 British adults, 9 May-5 June 2008

## What's wrong with the England football team?

Q. Why do you think England have struggled to qualify for the Euro 2008 finals?



Other answers below 9% omitted

Base: 1,001 England national team football fans, 13-14 November 2007  
Source: Ipsos MORI/The Sun

# Social marketing

One of the areas where Ipsos MORI has seen a substantial increase in the demand for research in the last year has been in Social Marketing. The rise of Social Marketing is being driven by the need to look at new and effective ways to drive behaviour change. Social Marketing takes many of the tools that have been used in the private sector for so long and adapts them to achieve a social good.

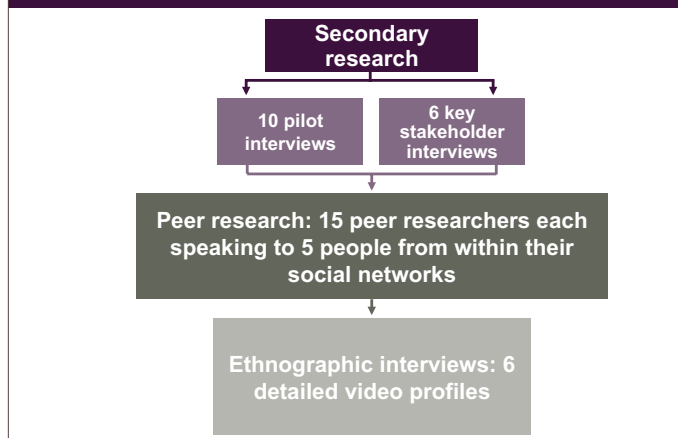
Social Marketing starts with the customer. If we want to design effective interventions to change behaviour, we should start by finding out what our target audience wants. We also need to acknowledge that what may prove effective for one part of the target audience may not be for another and Social Marketing achieves this through segmentation.

Our research is based on understanding where members of the target audience are starting from in terms of their knowledge, attitudes and beliefs relating to a particular research issue, as well as the social context in which they live and work.

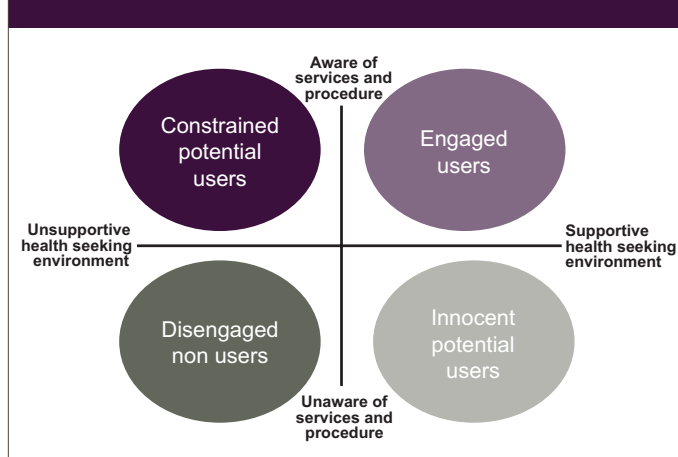
In the last year we have been asked to carry out a number of fascinating projects in a wide range of areas; from looking at how the rates of cervical screening can be improved in Tower Hamlets to understanding how healthcare services can be re-designed to improve access for hard-to-reach groups. To carry out these projects we have employed a wide range of methodologies from peer research to ethnography, in addition to more traditional research tools such as groups and interviews, to really try and uncover not only what people want from their health but also what might make a difference.

Our work in this area shows how important it is to leave our preconceptions behind and listen to the customer. Sometimes behaviour change does not always need a large-scale communications campaign and a small 'nudge' in the right direction can make a significant difference to health outcomes or individual well being.

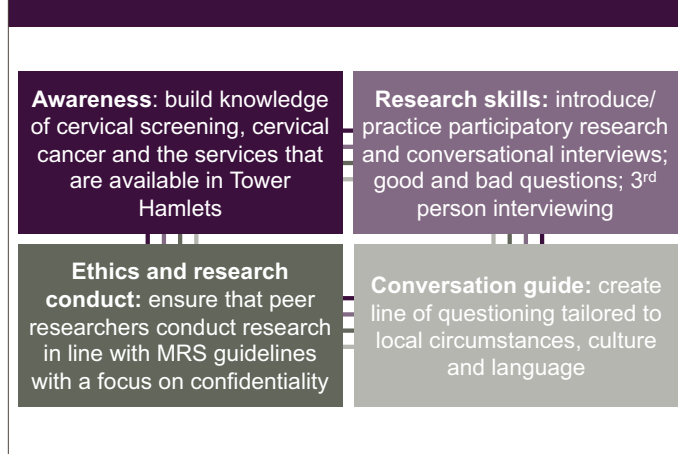
## Our research approach: cervical screening in Tower Hamlets



## Segmentation thoughts



## Peer researcher training





## Information

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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.