Arts Council England: the future library

Summary rapid review of evidence

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- Arts Council England has begun a major new work programme to create an inspiring and challenging vision for the purpose, value and potential of public libraries of the future. This will be the product of a wide-ranging debate informed by analyses of major societal trends, discussion of future scenarios, and a deep understanding of the public value of libraries

- The document forms part of the first stage of this work programme. Specifically it aims to review some of the evidence to help inform a debate about what society might look like in 10 years time and the impact, if any, this could have on libraries

- It focuses on pertinent 'high level' issues including changes to society, the economy and technological developments

- It has taken the form of a **rapid evidence review**; it is not intended to provide extensive coverage of all relevant data sources. Rather, it has sought to draw on Ipsos MORI data and some of the wider publicly available information relevant to the debate

- This document has been produced as an internal briefing aide, to help spark debate and steer future stages of the work programme. It is not intended to act as, nor should it be interpreted as, a wholesale evidence or futures review of UK society. Accordingly, its intention is not necessarily to reflect the latest available data

1. Population trends
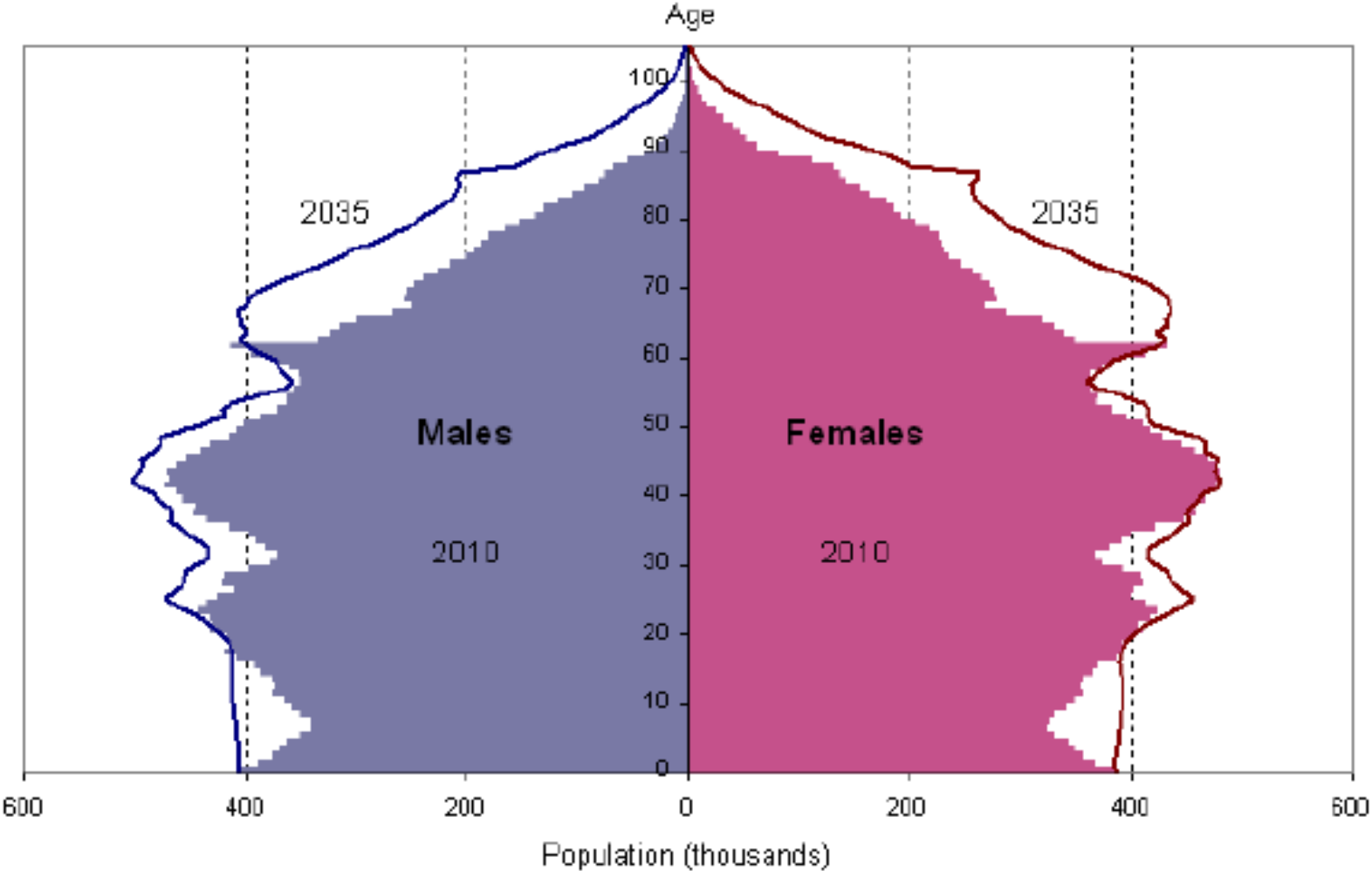
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The UK has a growing population

By 2027 the UK population will top 70 million …

- In 2010 there were 62.3 million people living in the UK
- By 2020 there will be 67.2 million…
- … and by 2035 the population will reach 73.2 million, with growth coming from natural increase and immigration

Source: ONS, *UK population predicted to reach 70 million by mid 2027,* 2011

## …with the 65+ and 85+ age groups growing fastest

- Certain segments are growing faster than others and the demographic profile of the UK is ageing, in common with other European nations

- The number of people of state pension age is expected to increase from 12.2 million to 15.6 million by 2035 (even taking into account the forthcoming legislative rise in this), reflecting the higher number of people born immediately after the 2nd World War and the 1960s "baby boomers"

- The numbers of "the oldest old" (over 85 years) are growing faster than any other age

    - Comprising 5% of the total population by 2033

- This is matched with a fall in the proportion of under 16s; 25% in 1971 to 19% by 2008

- By 2031 22% will be aged 65+ and 18% aged 16 or under

Source: ONS, *UK population predicted to reach 70 million by mid 2027,* 2011

Huge growth in the "oldest old"
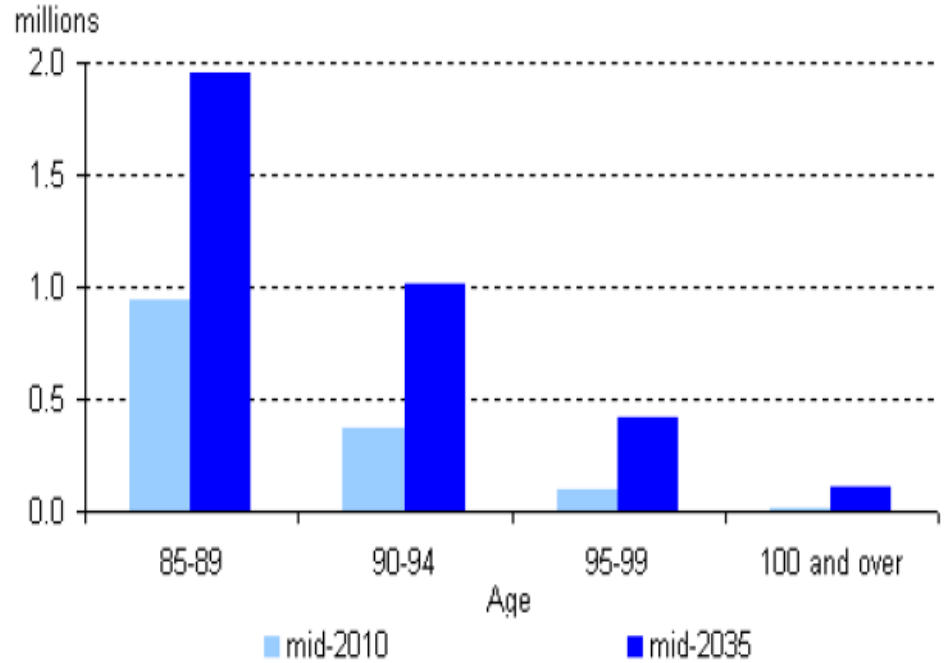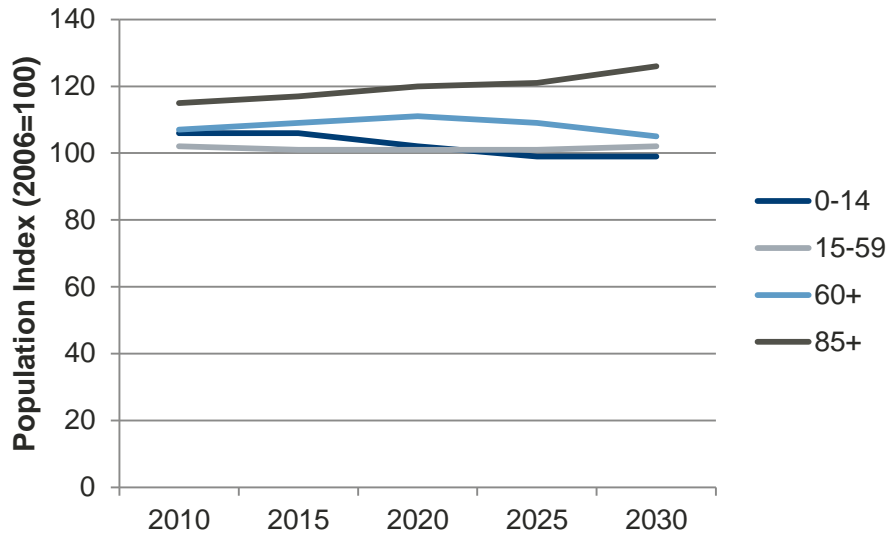
Source: ONS, *Projected Population by age, United Kingdom, 2010 to 2035,* 2011

Source: ONS, *Estimated and projected population aged 85 and over, UK, 2010 and 2035,* 2011

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Implications of an ageing population

- Implications for old age support ratios (fewer people of working age for every person of state pension age)
  - In 2010, there were 3.2 people of working age for each person of State Pension Age (SPA) and over in the UK[1]
  - Projected to fall to 2.9 by 2051[1]
  - Without the increases in SPA that are taking place under current legislation, it would drop further, to 2.0, by 2051[1]
- As people are living longer, demand for informal care from family, friends and community members is projected to rise by 40% by 2022[2]
- Potential implication on those public sector services heavily used by this age group – of which libraries are one[2]
- However, childlessness in Britain has also been increasing in recent years, a trend that, if it continues, may provide a new set of challenges for the care of older people who do not have family relations to rely upon[2]

Source: [1] ONS Pension Trends, February 2012
[2] Cabinet Office, *Realising Britain's Potential: Future Strategic Challenges for Britain.* 2008

- Figures for England and Wales show a trend of increasing numbers of live births since 2001
  - Total fertility rate now back to 1973 levels
  - A result of rising fertility in all age groups with the exception of women under 20
- Rise attributed to a combination of factors, including
  - Women born in the 1960s and 1970s delaying childbearing, but now catching up in terms of completed family size
  - Changes in support for families (maternity and paternity leave and tax credits)
  - Increases in the number of foreign born women with above average fertility (largely a function of their age)

Source: ONS Statistical Bulletin, *Births and Deaths in England and Wales in 2010*, 2011

2. Diversity and identity

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Diversity and identity

- UK society is increasingly diverse. 89% define themselves as white, but this varies significantly by area. London is most diverse, followed by the West Midlands[1]

- Net migration into the UK accounted for 62% of population growth between 2001 and 2008, though this has slipped back recently, accounting for 46% of growth in the year to mid 2008[2]

- After decades of rising tolerance, a majority (77%) of people now believe that the number of immigrants coming to Britain should be reduced; only 19% think it should remain the same[3]

- When it comes to mixing, personal social networks tend to be fairly homogenous. The Citizenship Survey suggests that social mixing, particularly *between* ethnic groups, is not common [3]

  - There is greater diversity in terms of friends' ages and incomes than in friends' religions and ethnicities. 84% say more than half of their friends come from the same ethnic background as them

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A significant bump in the birth rate is in part attributable to the influx of permanent migrants to the country

Daily Mail

Can a real woman look good in Kate Moss's new clothes range?

Foreign mothers help push Britain's population past 61m

THE MIGRANT BABY BOOM

This girl of 11 was snatched off the street 18 years ago. Yesterday she reappeared with a truly shocking story

% of live births (in England & Wales) to mothers whose country of birth was not UK

Year	%
2004	19.5
2005	20.8
2006	21.9
2007	23.2
2008	24.1
2009	24.7
2010	25.1
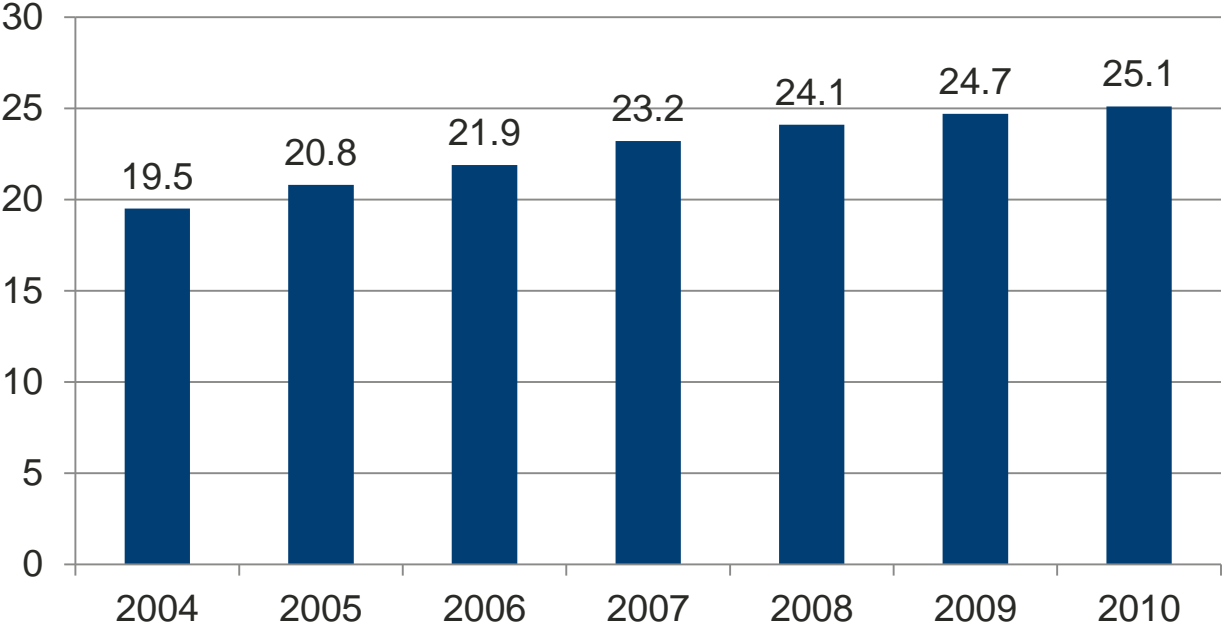
Source: ONS, *Frequently asked questions: births and fertility,* 2011

Social mixing, particularly between ethnic groups, is not common

Proportion of friends with the same …. background as them

% All the same | **% More than a half** | **% About a half** | **% Less than a half**

	% All the same	% More than a half	% About a half	% Less than a half
Age	31	39	20	10
Income	34	27	22	17
Religion	39	33	15	13
Ethnicity	48	36	9	7

Source: Ipsos MORI/DCLG, *Citizenship Survey*, 2011
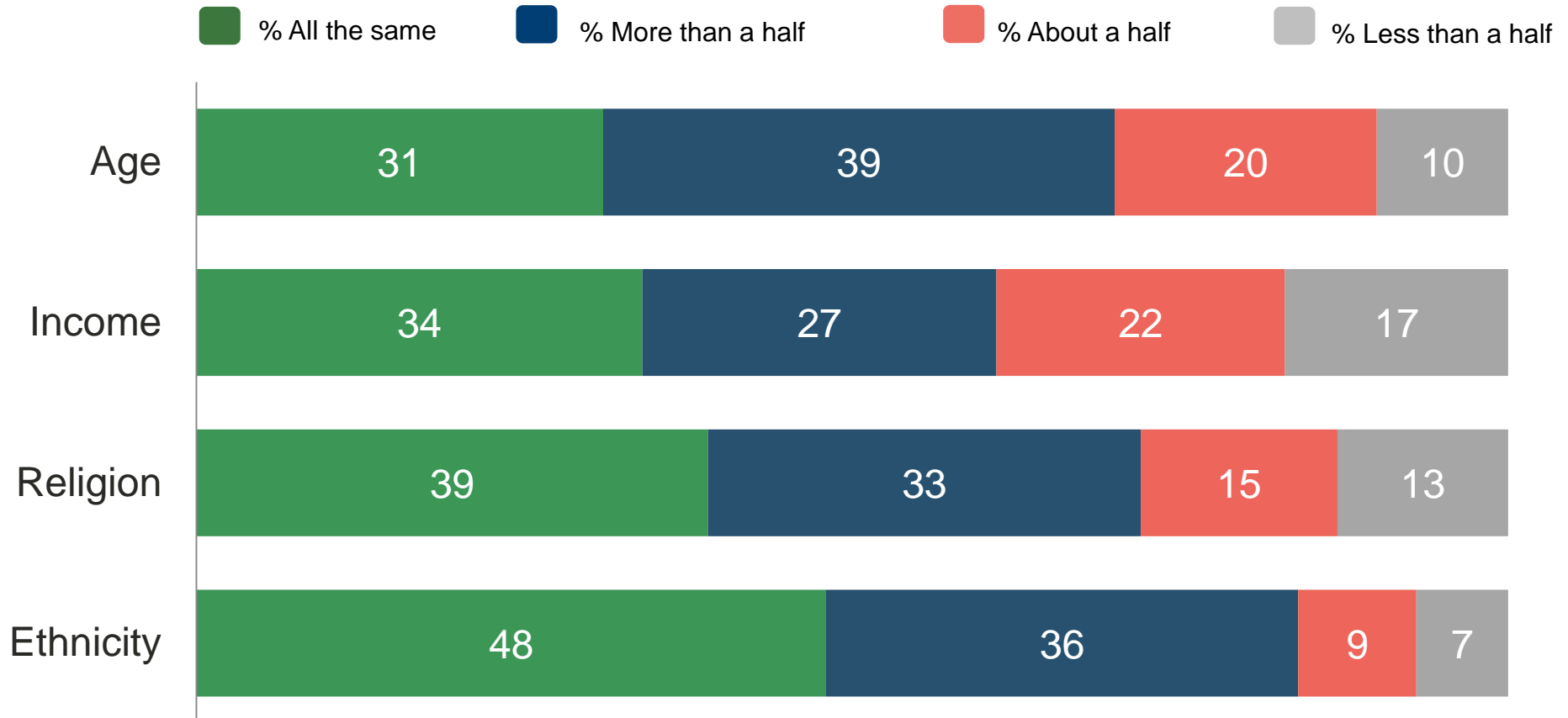
Base: Core sample in England (2009-10: 8,511)

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3. Household and family structure

…fewer of us are married and more live alone than ever before

- 26.3 million households in the UK in 2011, an increase of 1.4 million from 2001

- The number of households has increased faster than the population because of a trend towards smaller households

- While still the largest group, there are proportionately fewer households consisting of a couple, with or without children

- Married couple households are declining

    - More cohabiting as number of marriages has fallen since early 1970s

- Average household size reduced from 3.1 people in 1961 to 2.4 people in 2010
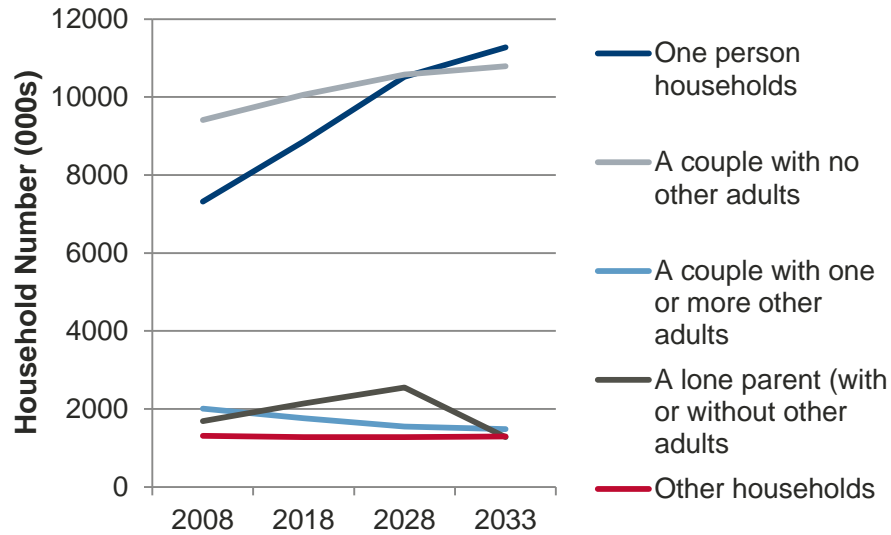
Source: ONS, *Families and households, 2001 to 2011*, 2012

Single person households increasing

…what do single person households look like?

- By 2005 the number of people living alone in Britain had more than doubled since 1971, from 3 million to 7 million

- Single person households comprise 29% of all households in the UK

  - 17% in 1971, expected to reach 38% by 2026 as people get married later and divorce rates rise

- Among single households aged 16-64 most are male

  - Partly because more men of this age never marry

- Among single households aged 65+ more are women

  - Women have a longer life expectancy

- Largest change in living alone is among 45-64 year olds

  - Reflects the twin facts that fewer of this group are getting married and more have never married or are divorced

Source: ONS, *Families and Households 2001 -2011,* 2012

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Source: DCLG, *Household Projections, 2008 to 2033, England, Housing Statistical Release,* Nov 2010

There has been a trend for people to live alone, especially amongst the working age population
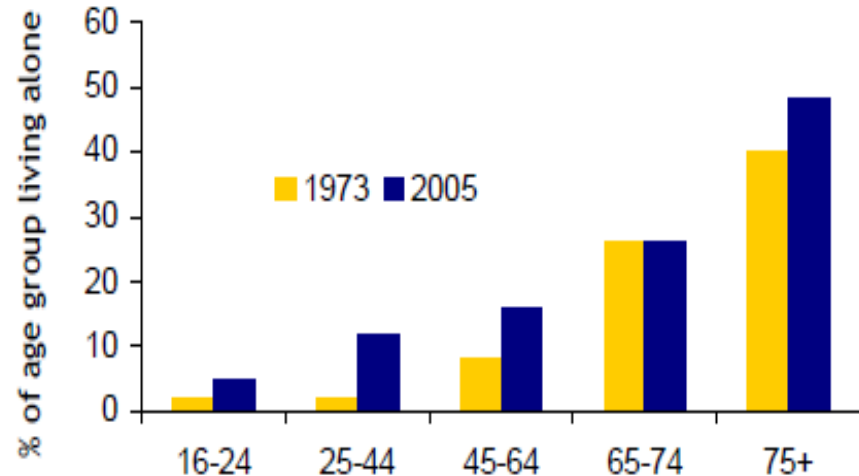
Source: DCLG, *Revised projections of households for the English regions 2001-2026,* 2008
ONS, *General Household Survey,* 2005

- We are getting married older, delaying parenthood and generally having fewer children

- Fewer traditional male breadwinner families and growth of other new kinds of families

- Greater variety of household structures, with more children growing up in non-traditional households

  - E.g. blended households with a mix of cohabiting parents, step-parents, single parent families, those living apart together and civil partnerships

- Evidence suggests that children in two parent households have better health and educational outcomes

- Meanwhile, lack of stability has been linked to other issues such as poverty, poor health and anti-social behaviour

Source: Department for Education, *Families in Britain: An Evidence Paper,* 2008

Overcrowded households

- As the population rises, overcrowding and people living in overcrowded homes has become an increasingly significant and important issue…

  - There is a long-term upward trend in the proportion of households experiencing overcrowding in both the social and private rented sectors (7% for social renters and 6% for private renters in 2010-11)[1]

  - The homeless charity Shelter's Chief Executive observes, *"many children are unable to study due to a lack of space; the impact of overcrowding is robbing them of an education..."*

Source: [1] DCLG, *English Housing Survey Headline Report*, *2010/11*, 2012

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4. Parenting and family time

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Changing role for women

- More women are in paid employment and in more senior/ responsible positions

  - Women comprise 15.6% of board members at the UK's 100 large-listed companies, an increase from 12.5% last year [1]

- Between 1971 and 2005 women's employment rate increased from 59% to 73% (whilst men's fell from 95% to 83%)[2] - a trend that is expected to continue

- Much of the increase is a result of an increase in part-time employment[3]

- There are suggestions that the pay gap is narrowing[3]

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…motherhood has changed and fathers are more involved

- As more women have careers and seek more egalitarian relationships, men and women frequently need to negotiate their roles within the family[1]

  - This is likely to be heightened as the economic downturn takes its toll on employment and families have to be flexible about who is at work

- The overall health of the economy naturally has an impact on families. Financial tensions often create family tensions, and may be a factor in family breakdown. In the current economic climate, families, like individuals, are facing growing anxiety over rising costs and debt [2]

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Family time becoming increasingly pressurised

- Traditional family time could become increasingly pressurised with female participation in the labour force rising

- Half of parents working full-time feel that they have insufficient quality time with their children and nine in ten parents said this is because of work demands

  - This is likely to increase as the economic downturn takes effect

- Four in five parents agreed that *"if money wasn't an issue, it would be better for one parent to stay at home and look after the children at least some of the time, rather than both working full-time"*

- Having said that, parenting matters a great deal and today's parents spend an average of 99 minutes a day engaging with their children compared with 25 minutes in the 1970s

- This varies by economic background, with educated working women investing more time in their children (contrary to the kind of popular anxiety around working mothers), but poorly educated working women are investing less time

- *"In the next generation, a group of children will have had a major advantage and I would expect to see a big increase in inequality"* (Heckman)

Source: (Then) Department of Children, Schools and Families, *National Survey of Parents and Children - Family Life, Aspirations and Engagement with Learning,* 2008

Emphasis on family life is still strong

- New family dynamics have implications affecting leisure, routines and eating behaviours

- Increasingly families are seeking and creating opportunities to spend more time together, preferably in the home, which serves as the main hub for free time as well as family life

- There is a movement for parents to want to just "hang out" and talk with their children – spending quality time together

- There are two events that are typically most valued by parents in creating quality family time:

    1. Family TV viewing. Despite the digitally driven fragmentation of "entertainment", watching TV together is seen as a key family event (a reversal of the situation a few years ago where TV was seen as a "divider" of family time)

    2. Family meals. Despite busy and time-stretched schedules, parents still see the "family dinner" as a special and landmark occasion. In practice family meals are more likely to be fragmented and individualised – but, many parents aspire to maintain the dynamic of the family meal as often as possible

Source: Ipsos MORI, *UK Trends & Futures, Family & the Good Life,* 2010

5. Work-life balance

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- We are working more than we did 20 years ago, even though contrary to conventional wisdom we actually work less than most of the rest of Europe [1]

  - Of 31 European countries surveyed the UK was ranked 29th in average number of hours worked at 35 hours

- Since 1981 two-adult households have added six hours – nearly a whole working day – to their combined weekly workload [1]

- We are concerned we do not have enough time to do everything we want to do[2]

- Leisure time tends to be more available to men than women and if you are a young, female, lone parent then you probably have no free time at all [3]

- The majority of people say they need more time to rest or do nothing at all[4]

Source: [1] European Foundation for the Improvement of Living and Working Conditions, *Fourth European Working Conditions Survey*, 2007
[2] Ipsos MORI, *Real Trends,* 2008
[3] NEF, *21 Hours,* 2010
[4] Ipsos MORI, *Le Slow* , 2011

Figure 1. Time spent on main activity by gender (working age only) – 2005.
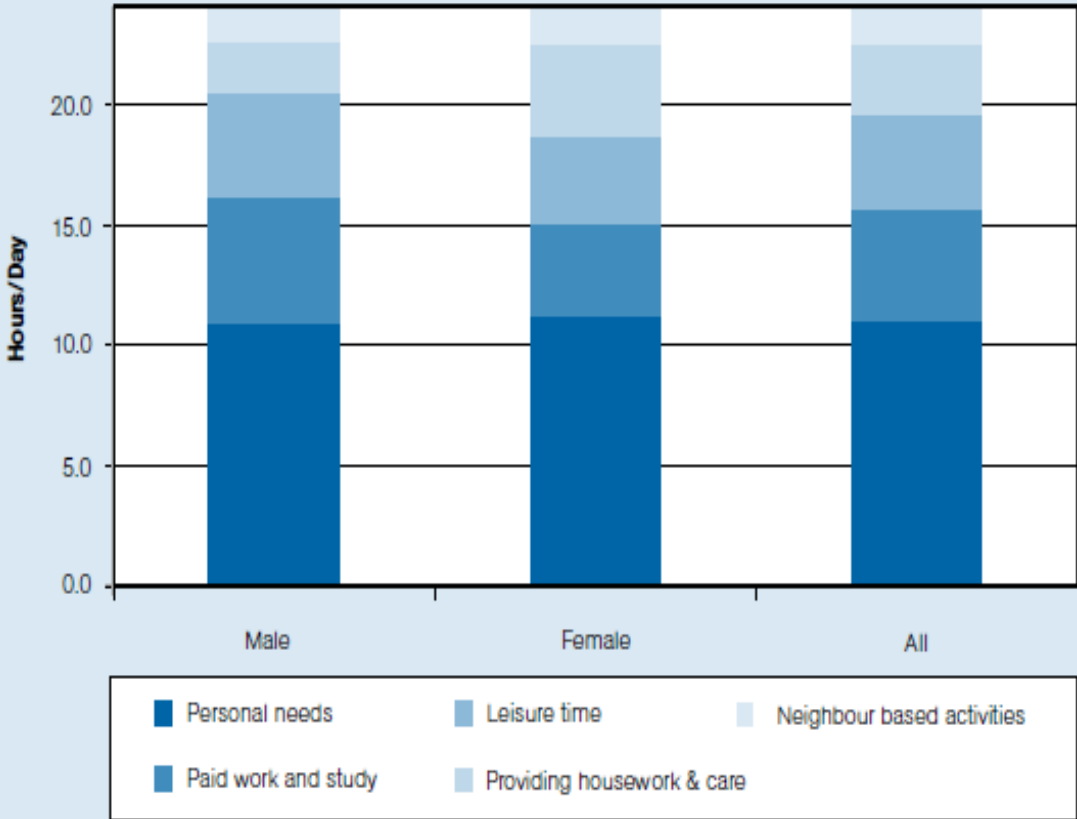
Work-life Balance

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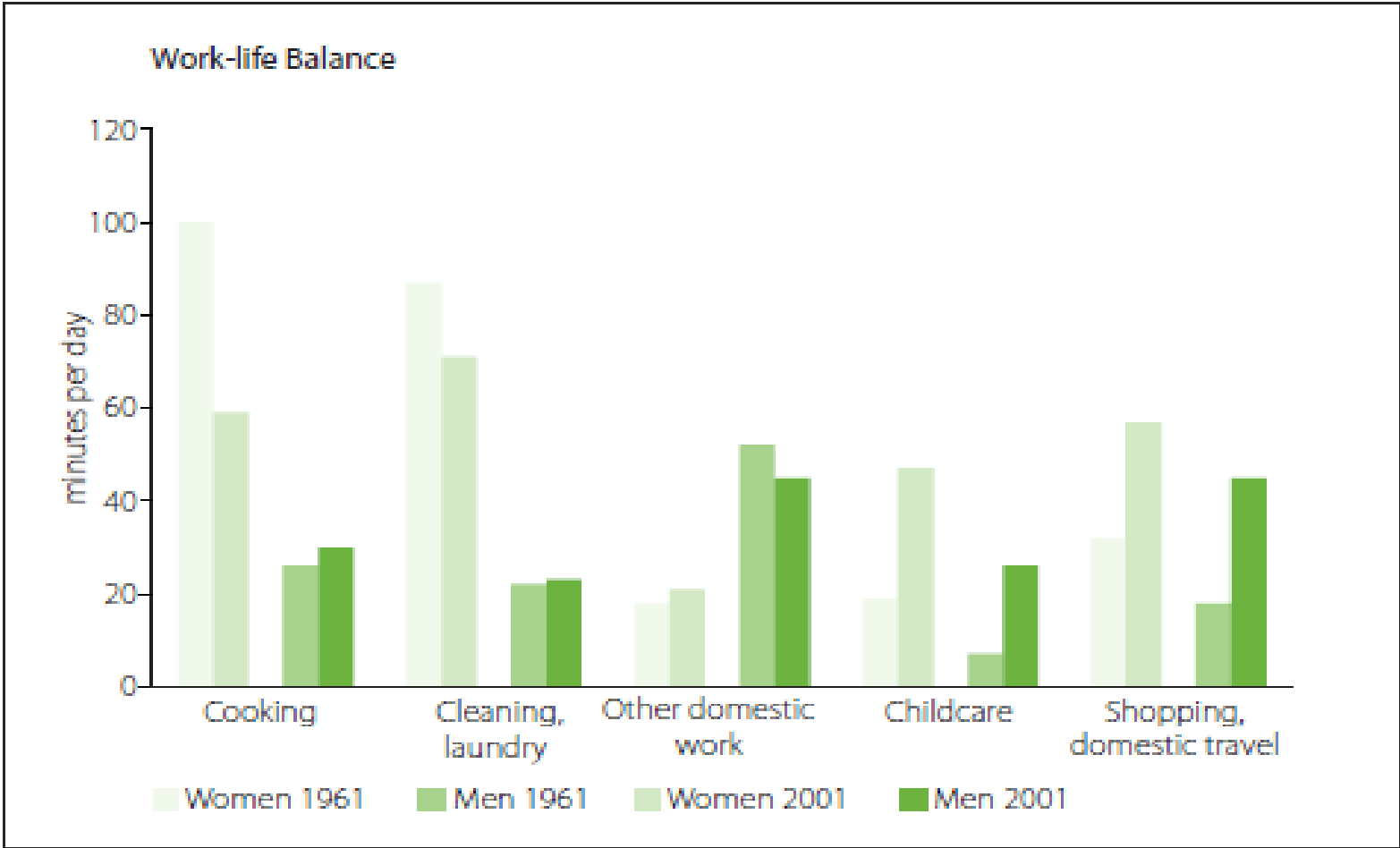
We are a growing nation of employees

- In the 10 years to 2010, the number of people working as employees has risen by 2 million, whilst the number of self employed has fallen by 250,000[1]

- Government predictions suggest that this is a trend that will continue[1]

- It is estimated that two-thirds of new jobs will go to women and that the same figure will be part-time roles[1]

- A growth in home working
  - At the end of 2009, it was estimated that were are 3.7 million (12.8% of the work force) people who worked mainly from their own home. A rise of one million from 1997 [2]

Source: [1] TUC, *Work Trends*, http://www.tuc.org.uk/changingtimes/worktrends.htm
[2] ESDS, *Labour Force Survey*, 2010

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We are constantly connected and we want things right now

- On-the-go technology, mobile broadband and high speed internet has conditioned the idea that we must always be connected and reachable

- We can connect to anyone, find information and watch, listen to or buy what we want, when we want

- Multi-media tasking is becoming the norm and instant information and instant service is a given

- There is growing demand for services which streamline our daily lives

- While watching TV, 86% of people also eat, 55% browse the internet/ check email, 47% talk on the phone/ send text messages and 27% work or do homework

- Internet users wait an average of 2 seconds for a page to load before losing patience

- 58% of diners don't like waiting to pay the bill at restaurants

Source: Mintel Inspire FSTR and HYPR, April 2011

We are slowing down

- The more we try to multi-task and save time, the more we realise how important it is to savour it

- There is a desire to stop rushing to keep-up and live a slower pace of life

  - 72% of people want to have more time to rest

  - 83% of people cherish the moments when they do nothing at all

  - Not a rejection of modernity – it is about taking a break not a back seat

- Engaging in activities which offer a degree of relaxation or escapism

  - Eating, travelling, cooking, exercising and socialising

  - Savouring experience over consumption

- E.g. Slow Down London – a project to inspire Londoners to improve their lives and do things well rather than as fast as possible

Source: Ipsos MORI, *Le Slow* , 2011

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Not enough time to do everything we want to do

There are just not enough hours in the day to do all that I want to do

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

2008

| 16 | 41 | | 29 | 6 |

1999

| 26 | 40 | | 24 | 5 |
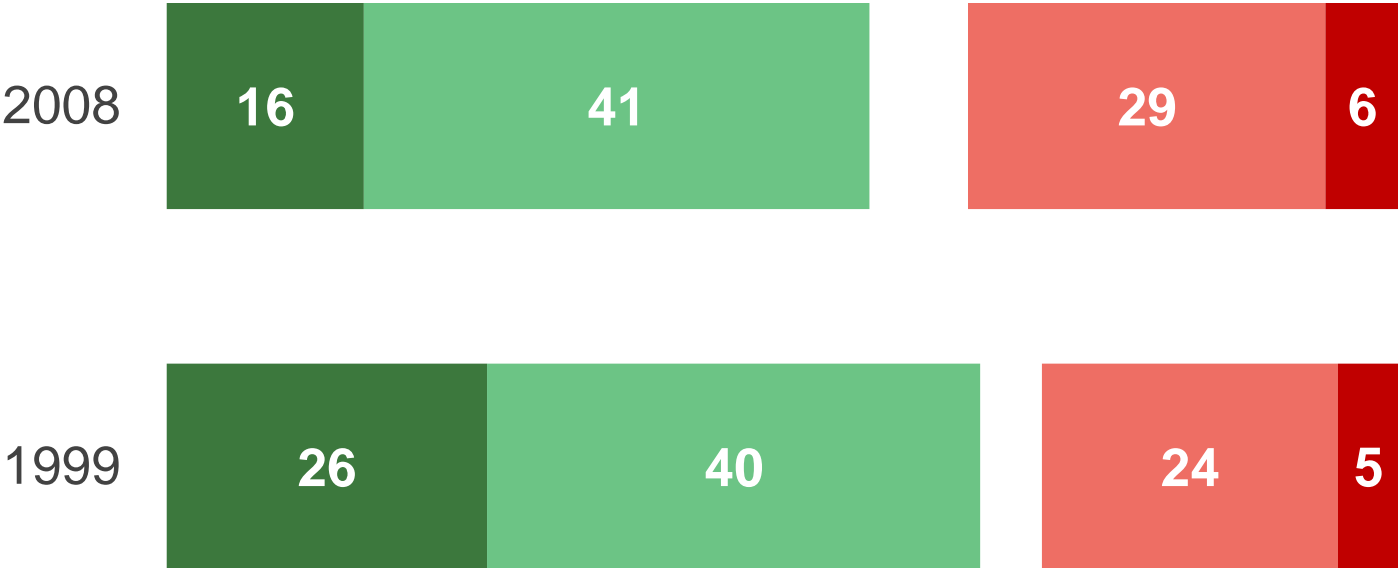
A majority of us (57%) still believe that there "*aren't enough hours in the day to do all that I want to do*". Although this presents a marked decline since 1999 when 66% of people agreed with the statement

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

Source: Ipsos MORI, *Real Trends,* 2008

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A desire for a slower pace of life

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

% Agree/ Strongly Agree

Statement	%
Cherish the moments when they "do nothing at all"	83
Like to "take their time to do things"	78
Want to "have more time to rest"	72
Are always in a rush, always looking to save some time	52
Can never find time to do what they want	52
Are often stressed	52
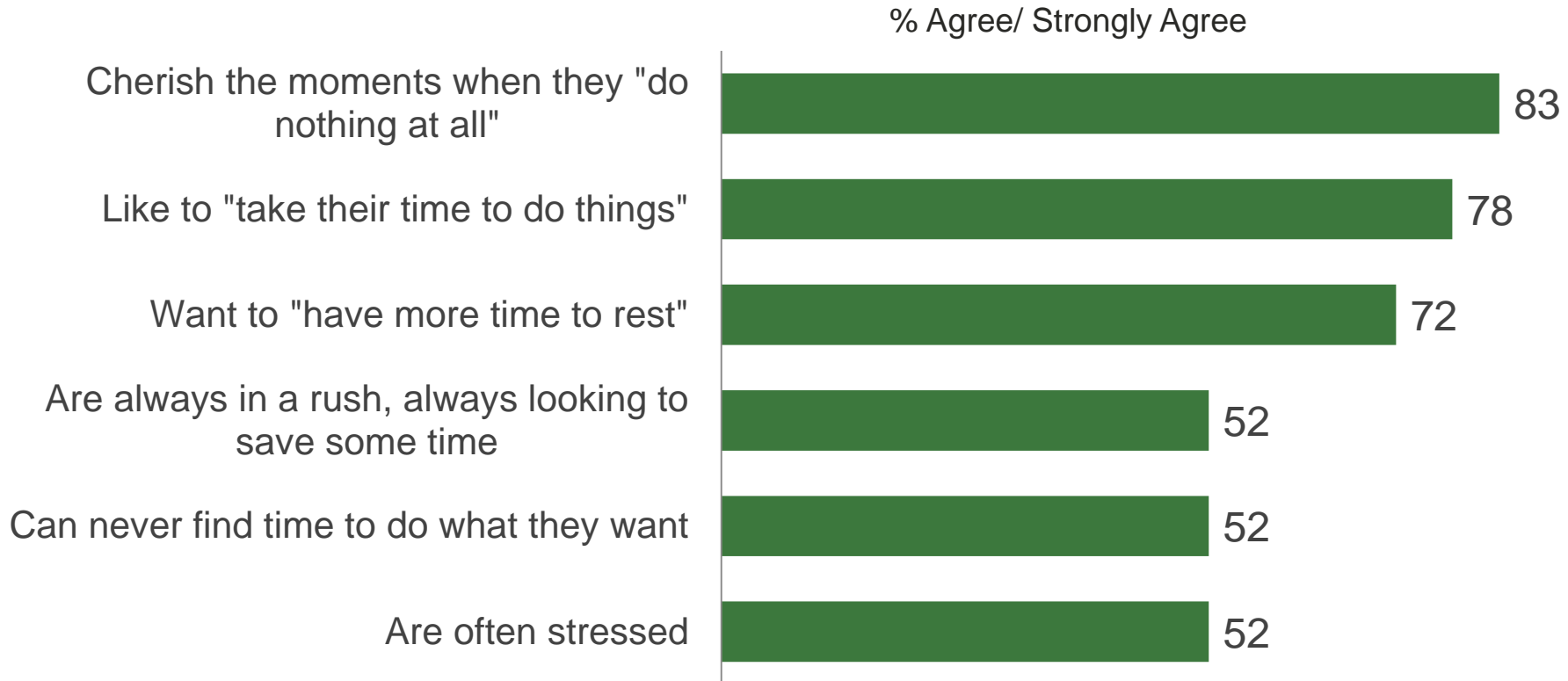
Base: Individuals aged 16 to 64 in 4 European countries

Source: Ipsos Le Slow, May 2011

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Those who have time are looking for new experiences…

I am always looking for new and meaningful experiences

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

Year	Strongly agree	Tend to agree	Tend to disagree	Strongly disagree
2008	10	41	38	7
1999	11	40	39	5
1997	10	41	38	7

Source: Ipsos MORI, *Real Trends,* 2008
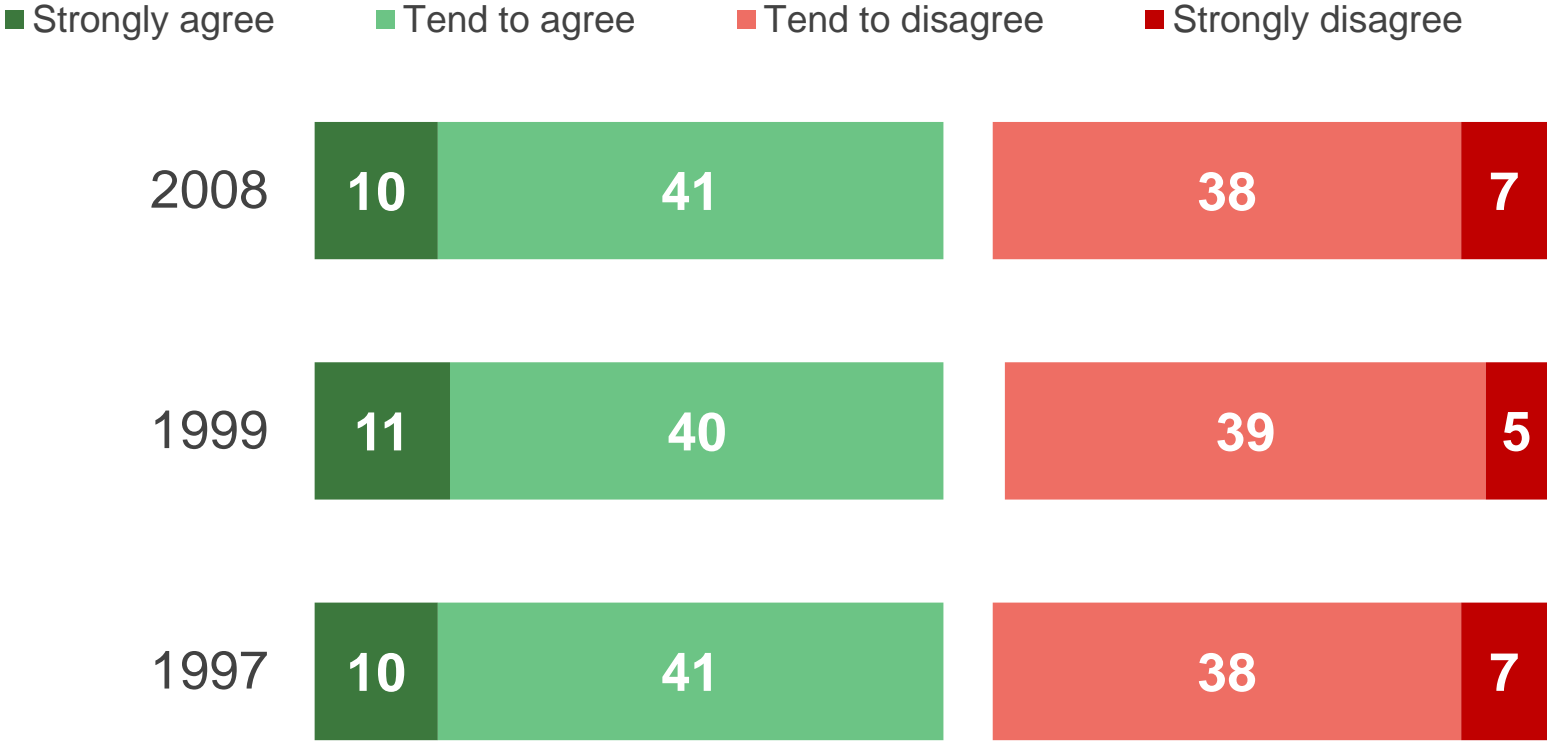
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We like self-development

I like to develop myself by trying new things out

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

2008

23 | 55 | 13 | 2

2005

9 | 47 | 29 | 8

	2008 %	2005 %	±%
15-29	89	75	+14
30-49	85	60	+35
50-64	69	47	+33
65+	62	34	+38
AB	84	63	+21
C1	80	57	+23
C2	70	52	+18
DE	73	50	+23

Source: Ipsos MORI, *Real Trends,* 2008
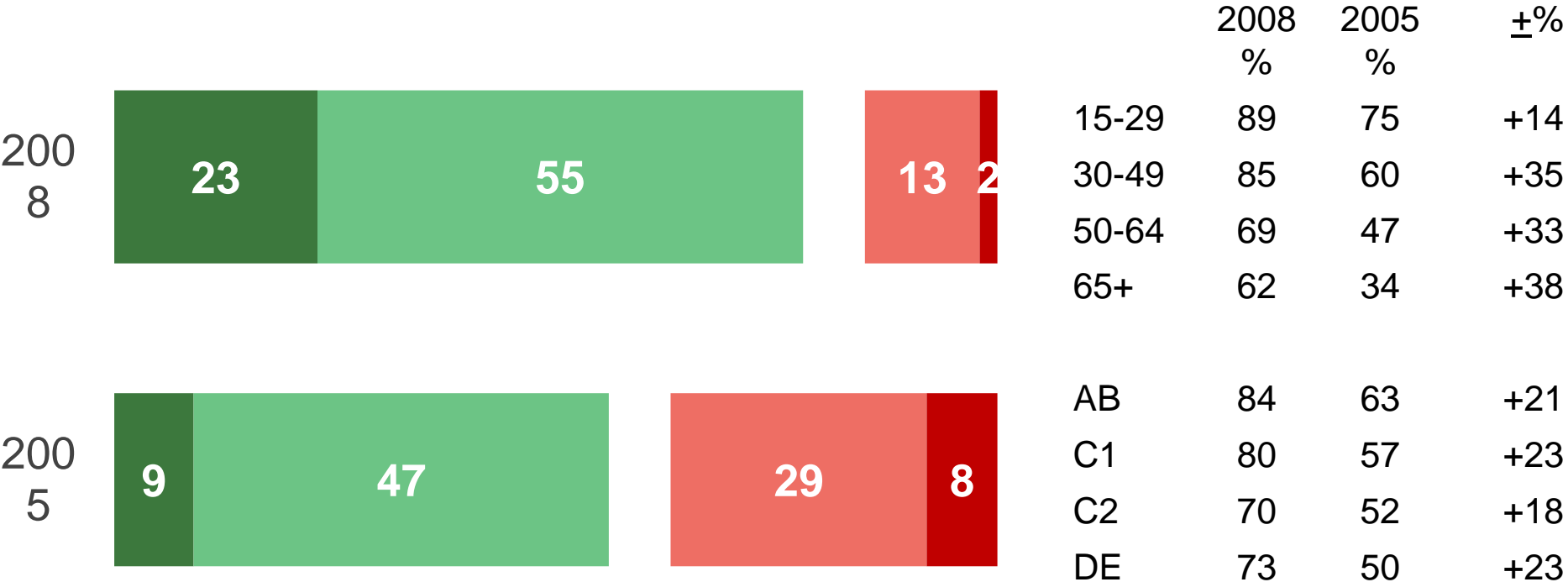
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6. Poverty and inequality

Persistent inequality and poverty

- Income distribution remains remarkably unequal [1]

- Lower income quintiles are heavily dependent on state support [1]

- This is reflected in the public's general view that poverty has been increasing and will continue to increase further [2]

  - In 2009 the belief that poverty would increase over the next 10 years reached its highest recorded peak, at 56% (see next slide)

Sources: [1]DWP, *Households below average income: An analysis of the income distribution 1994/95-2008/09,* 2008
[2]Nat Cen, *British Social Attitudes 28,* 2011

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Over the next ten years, poverty will...

Source: Nat Cen, *British Social Attitudes 28,* 2011

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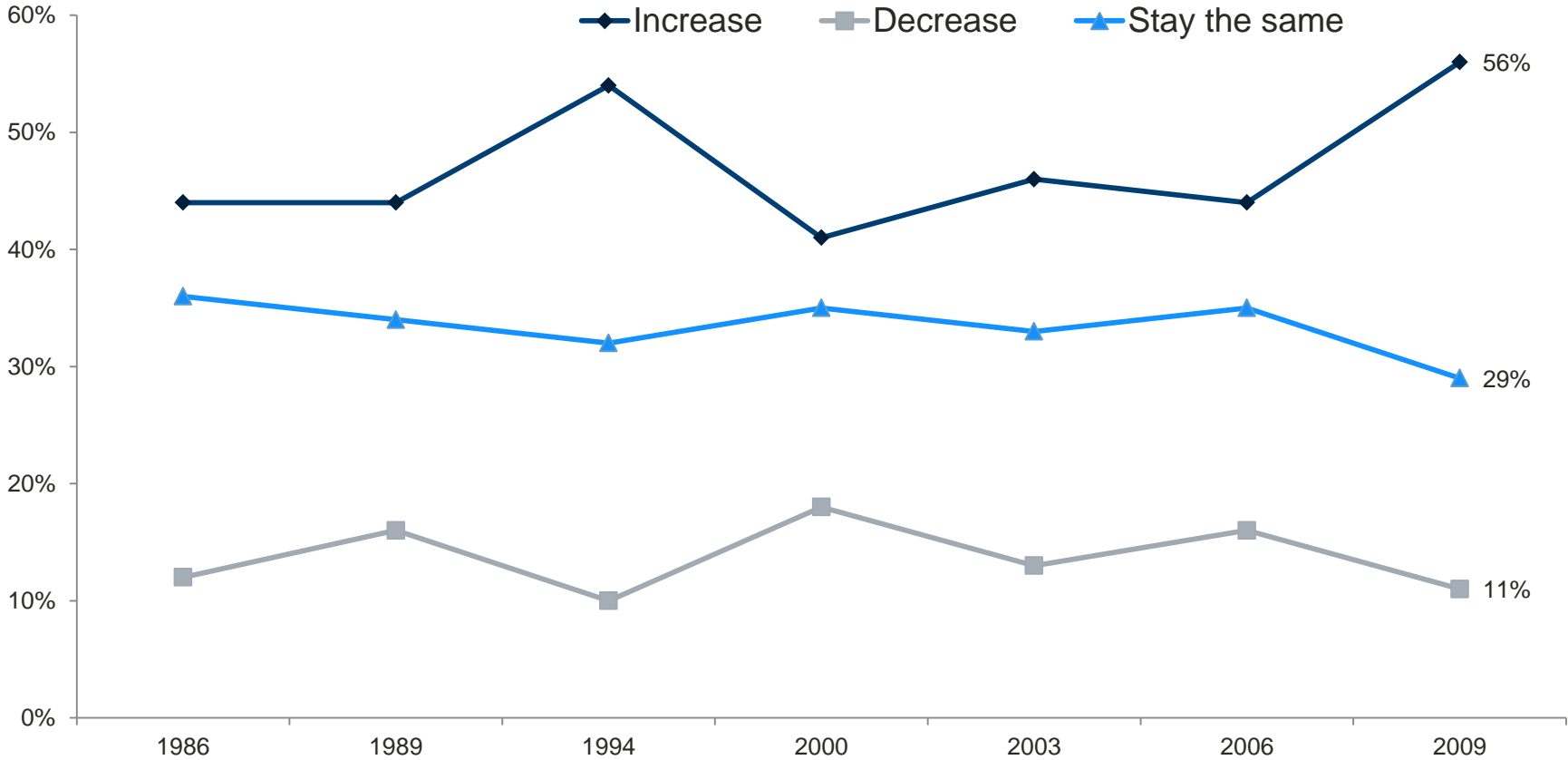
Child poverty impacting children's life chances

- After reaching a peak in mid-1990s child poverty has declined, but early progress has tailed off and the numbers in poverty are starting to rise once more [1]

- The perceived causes of child poverty and those that were most commonly mentioned by respondents revolve around the parents, rather than issues in society[2]

  - Drug and alcohol abuse was the most commonly cited reason when asked why a child lived in poverty– no factor which could be considered 'societal' (discrimination, insufficient benefit, inequality) was mentioned by a majority of respondents (see next slide)

Source: [1]DWP, *Households below average income,* 2008

[2] Nat Cen, *British Social Attitudes 28 ,* 2011

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Five most commonly mentioned reasons for child poverty

Reason	Percentage
Their parents suffer from alcohol, drug abuse, or other addiction	75%
Their parents do not work	63%
There has been a family breakdown or loss of a family member	56%
Their parents lack education	51%
Their parents have been out of work for a long time	50%

Non personal factors:
- They live in a poor quality area (44%)
- Inequality in society (43%)
- Insufficient social benefits for families (39%)
- Family suffer discrimination (19%)
- Cannot access affordable housing (16%)

People are still living in need

- Trends recorded in British Social Attitudes surveys indicate a small shift in people's opinions of the causes of need generally

- In 2000, "*laziness/lack of willpower*" overtook "*injustice in society*" as the second most commonly cited reason for why people live in need. Despite a small decline in the proportion of respondents who select it, it has remained in second position ever since

- The belief that living in need is related to individual effort has grown in recent years, yet the most common response remains that need is inevitable in modern society

Source: Nat Cen, *British Social Attitudes, 28.* 2011
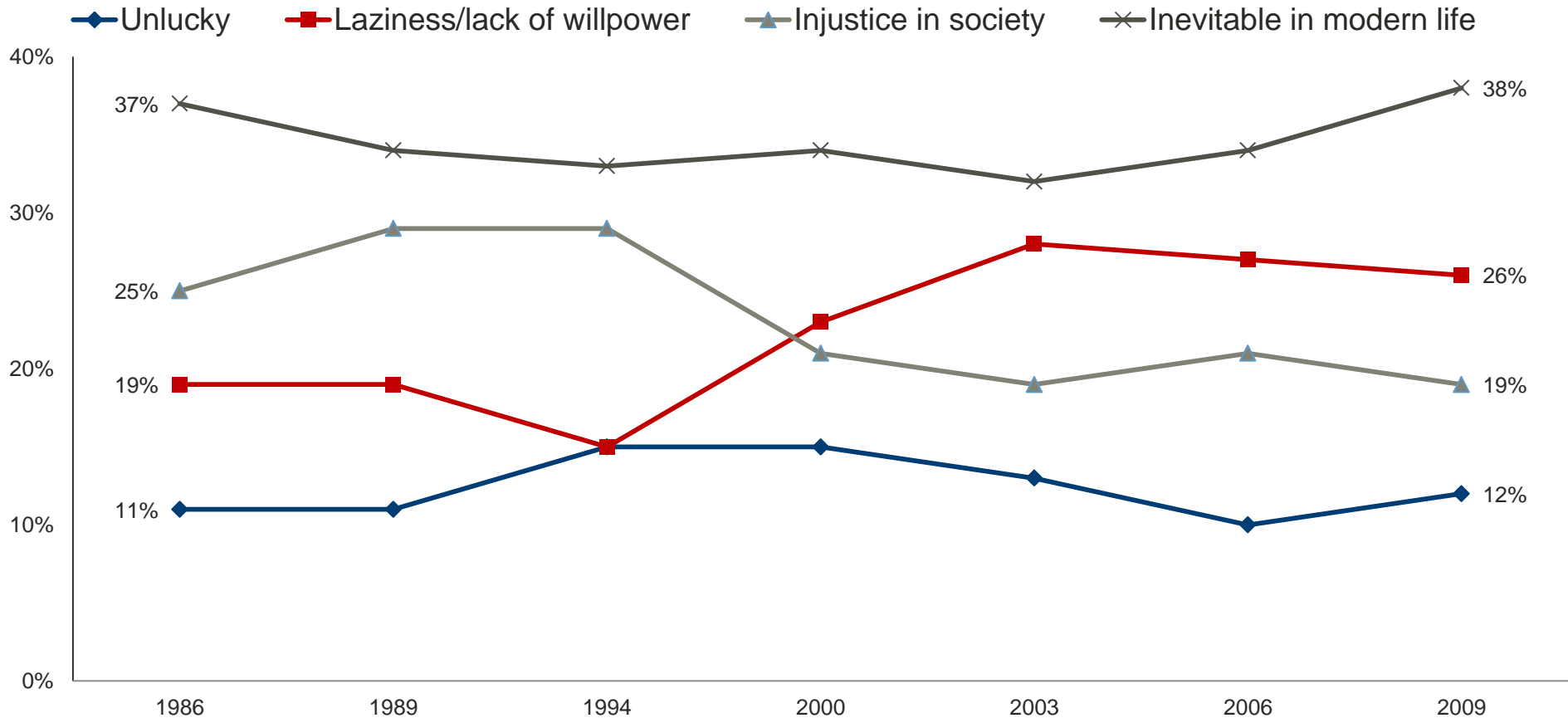
Individual responsibility rises as a cause of need

Why do people live in need?

Legend: Unlucky — Laziness/lack of willpower — Injustice in society — Inevitable in modern life

Source: Nat Cen, *British Social Attitudes, 28.* 2011

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7. Young people in society

Young people and how they are perceived today

- A majority of people think that parents should take more responsibility for their children than they do currently (only 30% agree that in their local area, parents take enough responsibility for the behaviour of their children)[1]

- Most people also think that young people have too much freedom and not enough discipline[2]

- Few teenagers eat their main meal with their parents during the week, and a high proportion spend at least a few evenings a week with friends instead[3]

Source: [1]DCLG, *Place Survey,* national figures, 2008
[2]Ipsos MORI, *Real Trends 2008*
[3]IPPR, *Freedom's Orphans*, 2007

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"Young people today have too much freedom and not enough discipline"

- 🟥 % Strongly disagree
- 🟧 % Tend to disagree
- 🟩 % Tend to agree
- 🟩 % Strongly agree
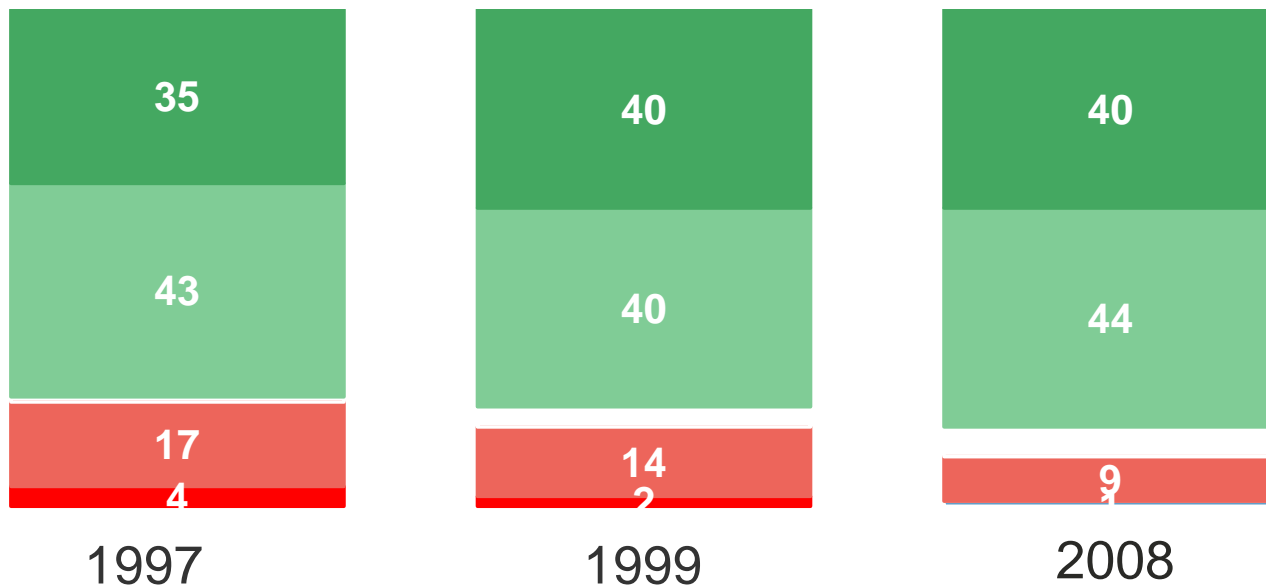
Over 80% think young people have too much freedom

1997
- 35
- 43
- 17
- 4

1999
- 40
- 40
- 14
- 2

2008
- 40
- 44
- 9
- 3

Most teenagers still care what others think

"If other people are offended by my behaviour that is their problem…"

Strongly agree 6%

Tend to agree 25%

Tend to disagree 44%

Strongly disagree 15%
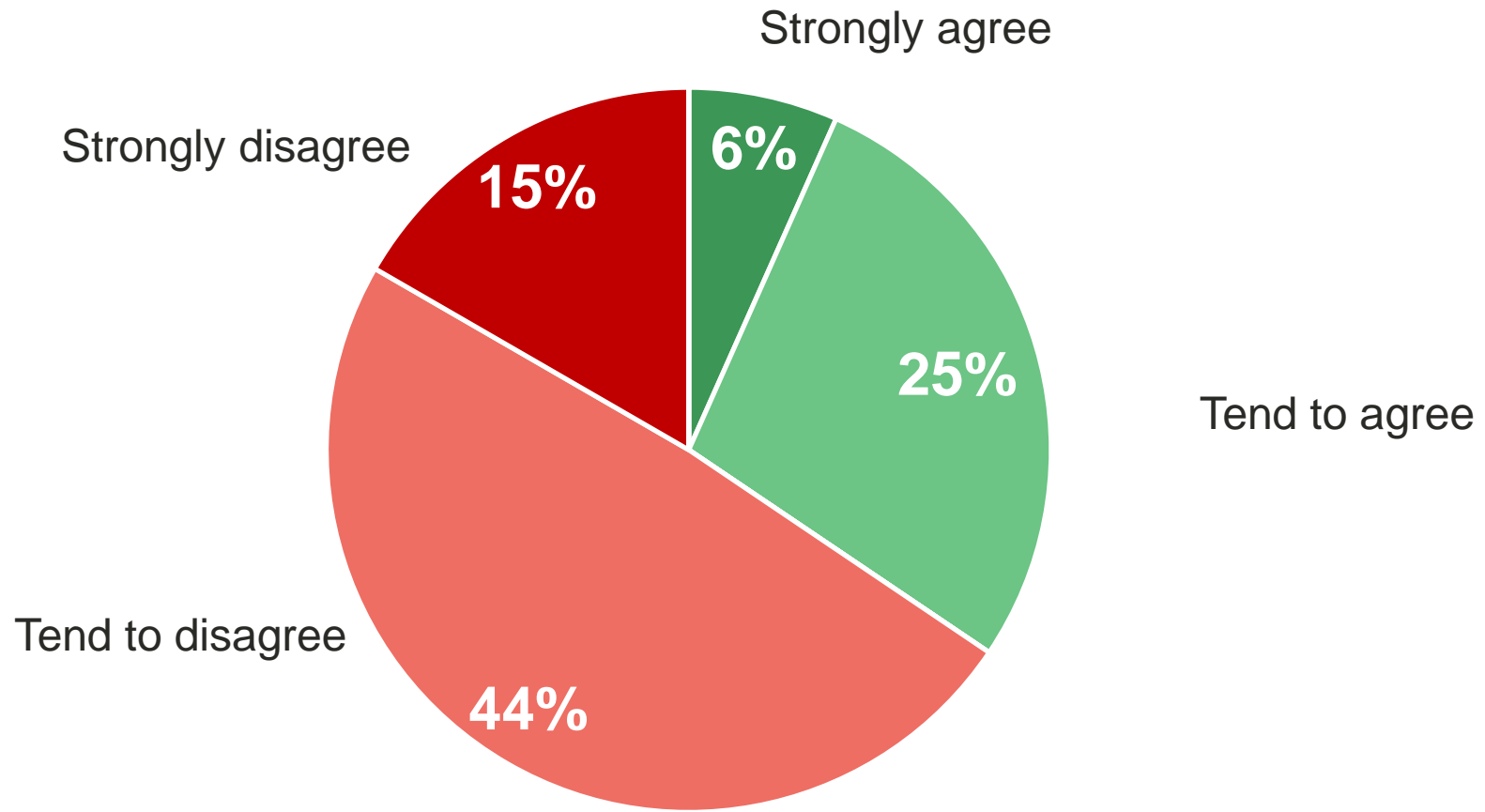
Base: Self-completion and online, 2,019 British adults 16+ 9 May – 5 June 2008

Source: Ipsos MORI, *Real Trends 2008*

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Materialism amongst young people is perceived to be a problem by a significant majority

Q   To what extent do you think that the following are problems in your local area? (Materialism among young people)
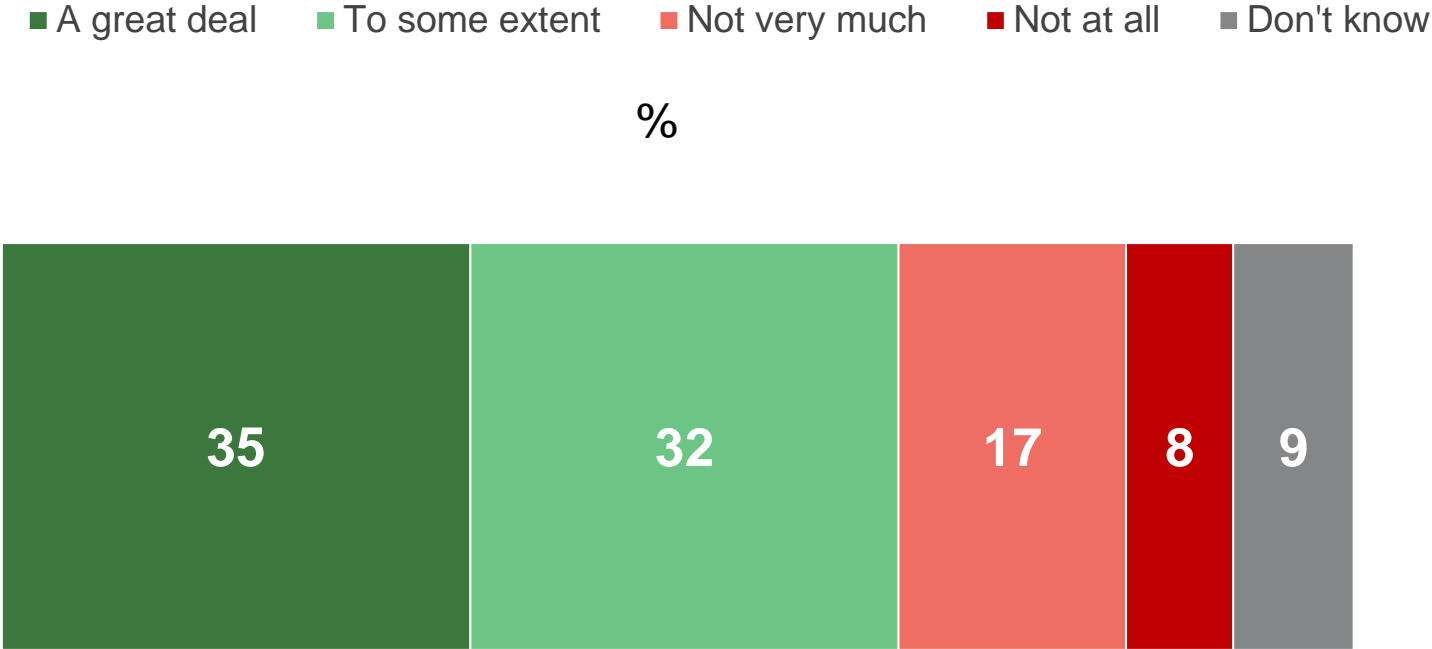
■ A great deal   ■ To some extent   ■ Not very much   ■ Not at all   ■ Don't know

%

A great deal	To some extent	Not very much	Not at all	Don't know
35	32	17	8	9

Base: All. Telephone interviews with 1,204 respondents aged 16+ in selected areas of England. Fieldwork dates 14–22 February 2012

Source: DCLG/ Ipsos MORI, *Research for the Riots Communities and Victims Panel*, 2012

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A majority think there is too much pressure on young people to own the latest products

Q *To what extent do you agree or disagree that . . .? (Advertising puts pressure on young people to own the latest products)*

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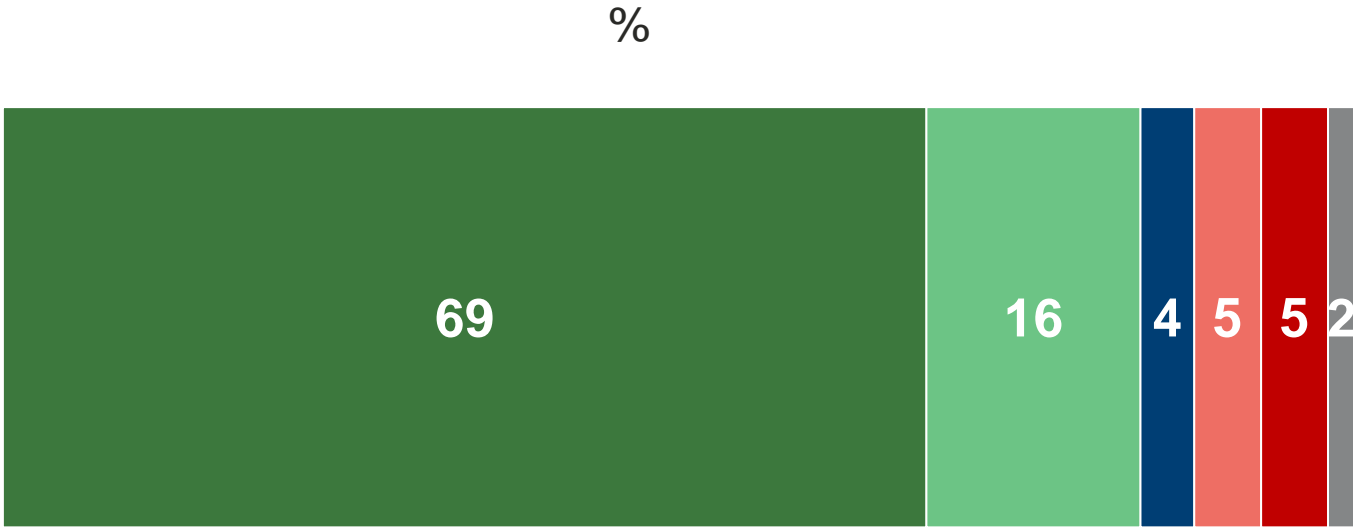
%

| 69 | 16 | 4 | 5 | 5 | 2 |

Base: All. Telephone interviews with 1,204 respondents aged 16+ in selected areas of England. Fieldwork dates 14 – 22 February 2012

Source: DCLG/ Ipsos MORI, *Research for the Riots Communities and Victims Panel*, 2012

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British teenagers spend a lot of time with friends compared to teenagers in other countries

Proportion of 15 year olds spending time with friends four or more evenings a week
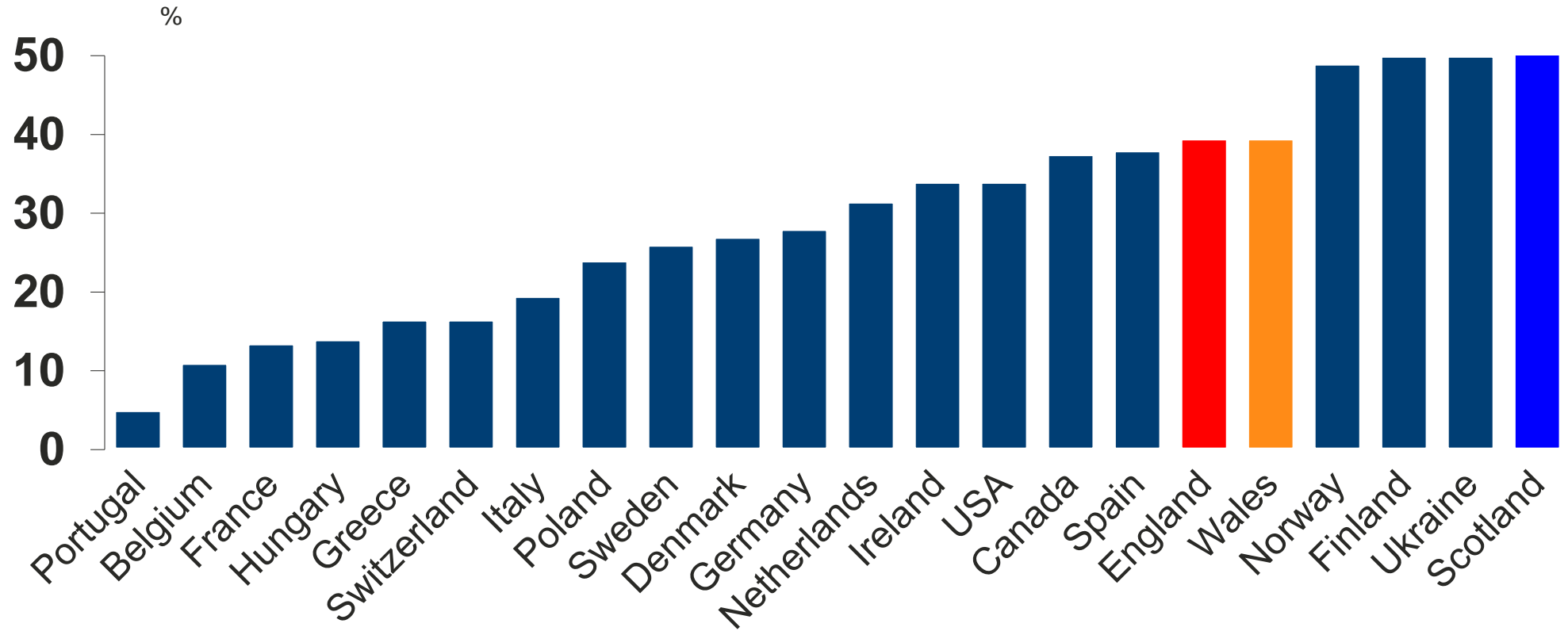
Source: IPPR, 'Freedom's Orphans', 2007

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They are fairly inspirational

- Most young people are optimistic about their future
  - More than four in five (82%) pupils say that they feel positive about their future after Year 11[1]
  - Four in five intend to go into higher education [2]
- Pupils identify a number of different aspects to success in life, such as: "making money", "being a celebrity", "having a family", and "having a job you want to do" [1]
- Underpinning this understanding of *success* is both a personal sense of achievement and also that others recognise and respect you for it [1]
- However, notions of success at school are much more limited and tend to be focused around high achievement in exams [1]

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Q How likely or unlikely are you to go into higher education when you are old enough?

- % Very likely
- % Fairly likely
- % Not sure either way yet
- % Fairly unlikely
- % Very unlikely
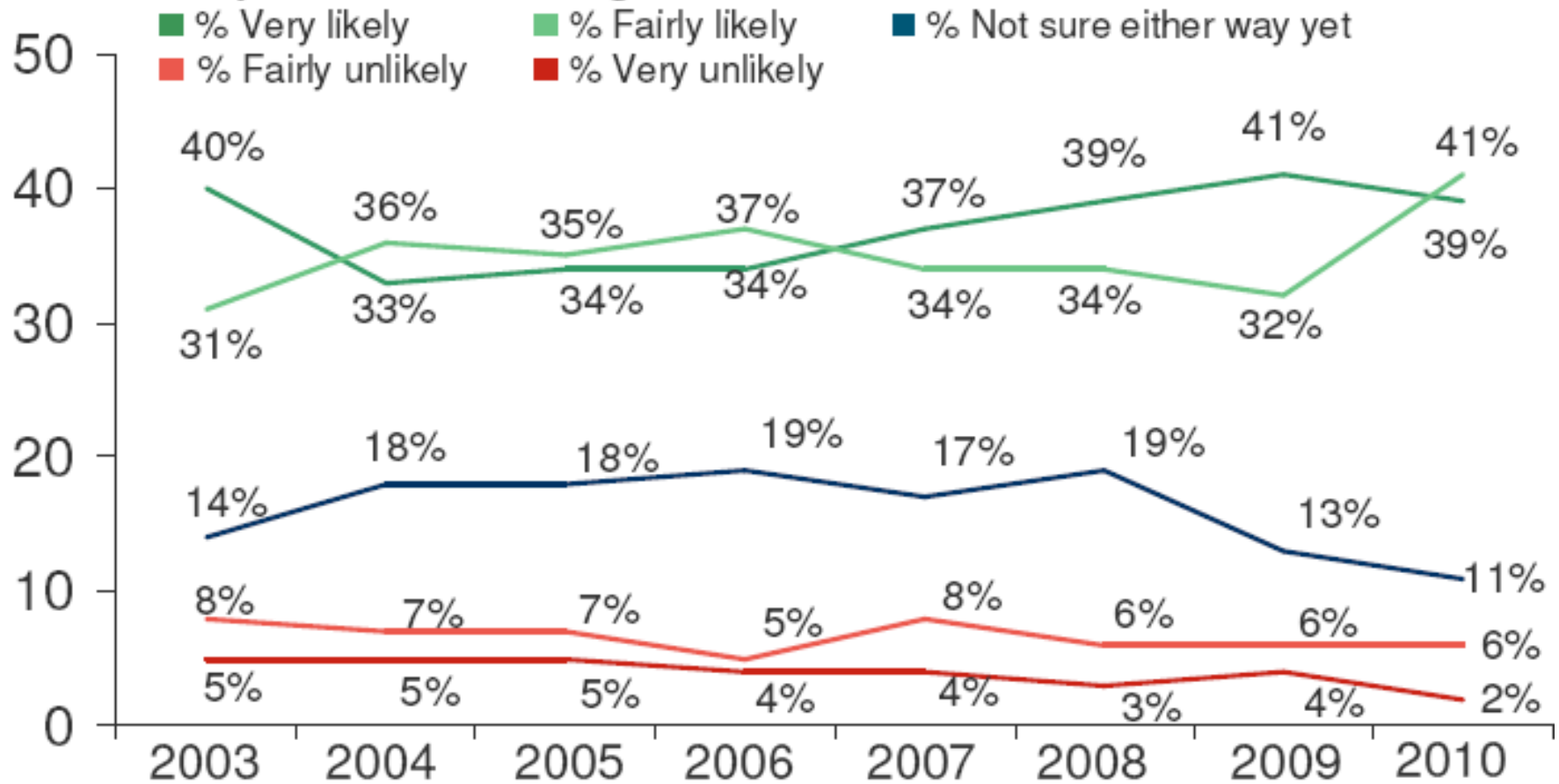
Base: c. 2,500 young people aged 11-16 each year

Source: Ipsos MORI/ Sutton Trust, *Young People Omnibus 2010 (Wave 16)*, 2010

Future job aspirations

Q What job would you like to do when you are older?

Responses 8% or over shown

Job	Percentage
Sportsman/woman	18%
Actor/actress	17%
Teacher	13%
Police officer	13%
Armed forces	13%
Dancer	12%
Vet/vet nurse	11%
Businessman/woman	10%
Lawyer/solicitor/barrister	8%
Engineer	8%
Doctor	8%
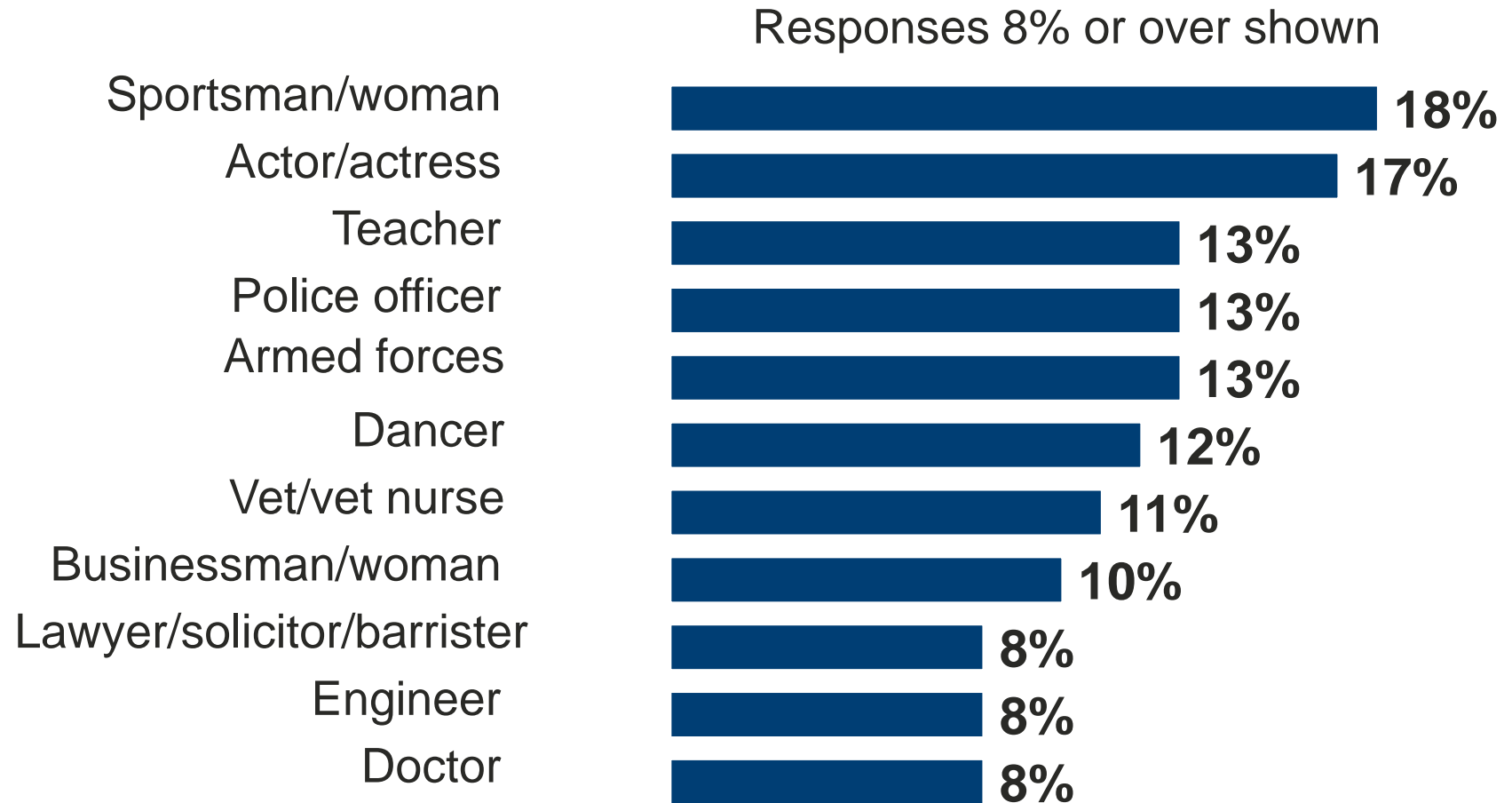
Base: Nesta, 2,447 Young People aged 11-16 in England and Wales. Fieldwork dates: 9th January - 3rd April 2009

Source: Nesta, 2009

Children's participation in culture

An Ipsos MORI study on behalf of the government found the following:

- The majority of children had participated in some form of cultural activity

- Secondary-age children are more likely to take part in cultural activities during school hours (81%) than outside of school (75%)

- Primary-age children are more likely than secondary-age children to participate in out-of-school activities (91% and 75% respectively)

- The cultural forms that children most commonly engage in are drama and literature and arts and crafts (around half of children); they are least likely to engage in street art, circus and festivals

- There is a demographic dynamic, with older boys from ethnic minorities, as well as those eligible for free school meals, more likely to be non-participants vs. younger girls from white ethnic backgrounds and those not eligible for free school meals most likely to be frequent participants

- The great majority of parents and over half of secondary-age children feel that the quality of the cultural activities on offer in their local area, and the information available about them, could be improved – and there is strong appetite for getting more involved in cultural activities

Source: Ipsos MORI SQW/ DCMS/ (then) DCSF, *Evaluation of the Find Your Talent programme: Baseline quantitative findings from ten Find Your Talent pathfinder programmes*, 2009

8. Community and society

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Fragmentation of British society

- Core underlying values in British society (tradition, respect, fairness and shared values) are changing [1]

- We have an increasingly pessimistic collective outlook – we are uncertain about our future[2]
  - In 2008 29% said they felt less secure about the future compared with 20% in 1999

- Economic backdrop – life is tough and we are unsure how long it will last

- Fewer shared experiences mean we are a more fractured society[2]
  - More single households and individualist consumption e.g. fragmented media landscape

- Strong sense that as we take control of our individual lives more – taking advantage of opportunities for individual choice in the private sector and the new media landscape – we feel less empowered to act collectively (family, community or society) [2]

- We are more demanding and expect services to be tailored to our needs and for them to be citizen focused [2]
  - Our needs become more diverse as we think as individuals rather than communities

Sources: [1] Ipsos MORI, *Real Trends,* 2008
[2] Ipsos MORI, *How we see public services and what this means for the BBC, 2009*

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A majority perceive Britain to be broken

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

September 2008

- Don't know: 3%
- Strongly agree: 35%
- Tend to agree: 28%
- Neither: 7%
- Tend to disagree: 16%
- Strongly disagree: 11%

August 2011
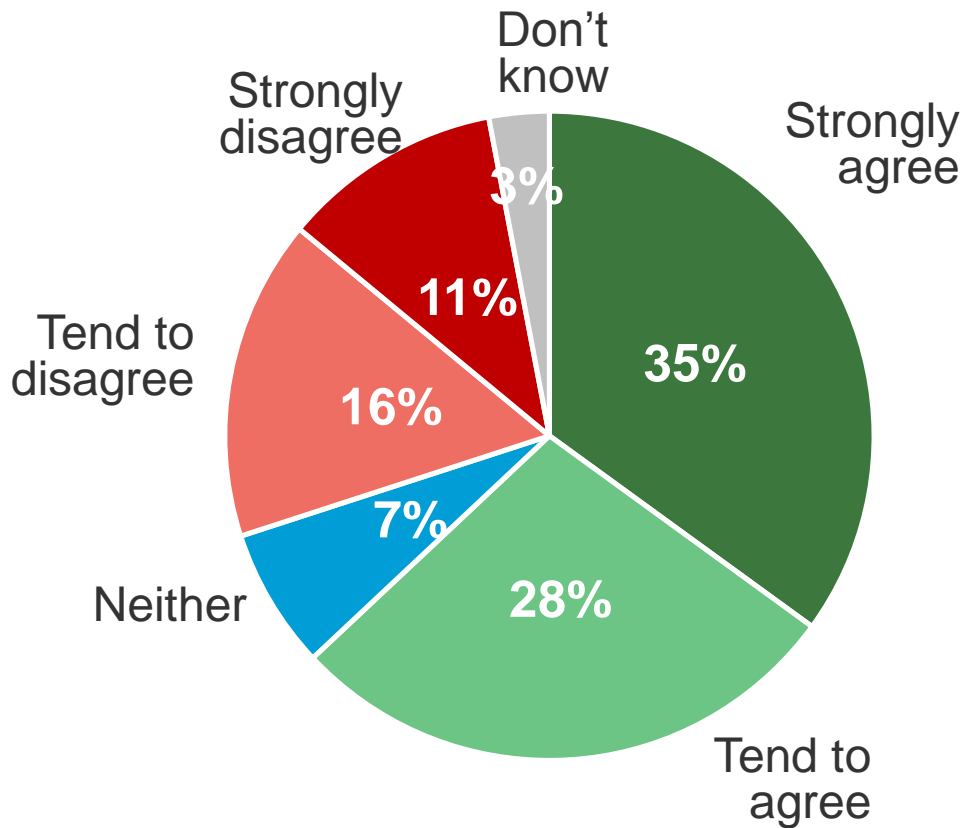
- Don't know: 3%
- Strongly agree: 32%
- Tend to agree: 26%
- Neither: 10%
- Tend to disagree: 18%
- Strongly disagree: 11%
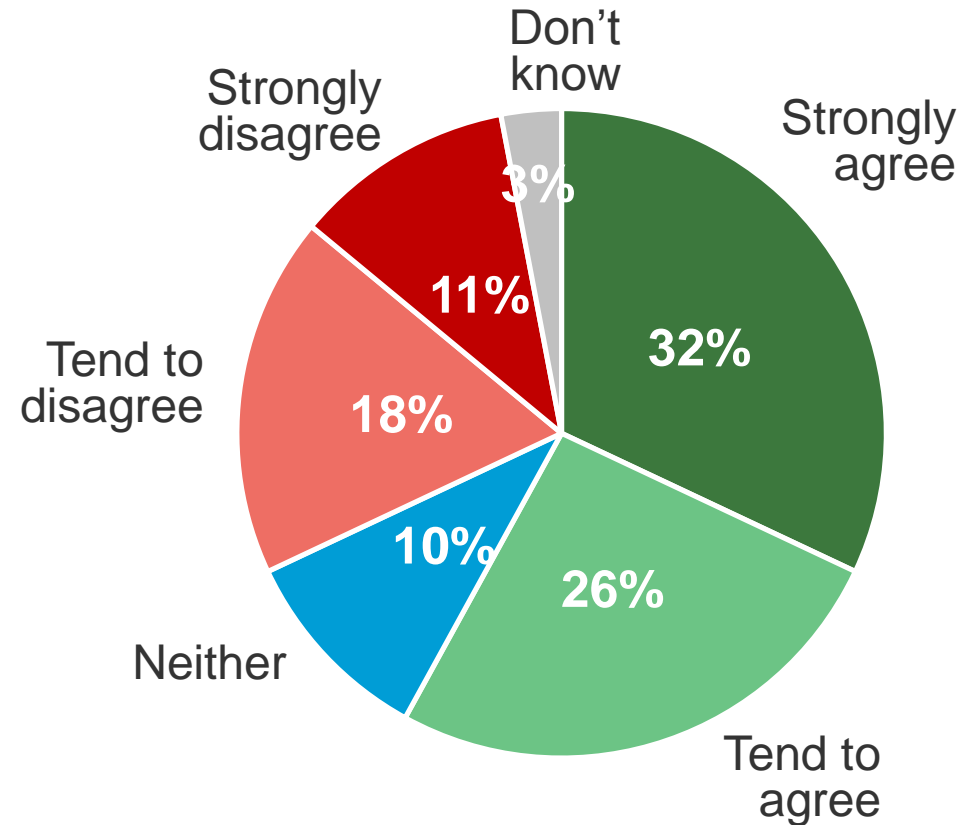
Base: 1,017 British adults 18+, 12-14 September 2008; 1,002 British adults 18+, 20t– 22 August 2011

Source: Reuters/ Ipsos MORI, *Political Monitor,* 2011

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Community and the local area

- But, despite the perception of 'broken Britain' people are happy with their local area…

- The majority of us are satisfied with our local area as a place to live and like living in our local area [1]

- The majority feel they belong to where they live, although we are more likely to feel we belong to Britain as a whole than either our local area or neighbourhood[2]

- Almost all enjoy living in their local neighbourhood [2]

- A (smaller) majority also agree that local people pull together to improve their neighbourhood[2]

- Perceptions of community cohesion have remained fairly consistent over the 2000s [2]

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People increasingly satisfied with their local area

Q   *Overall, how satisfied or dissatisfied are you with your local area as a place to live?*
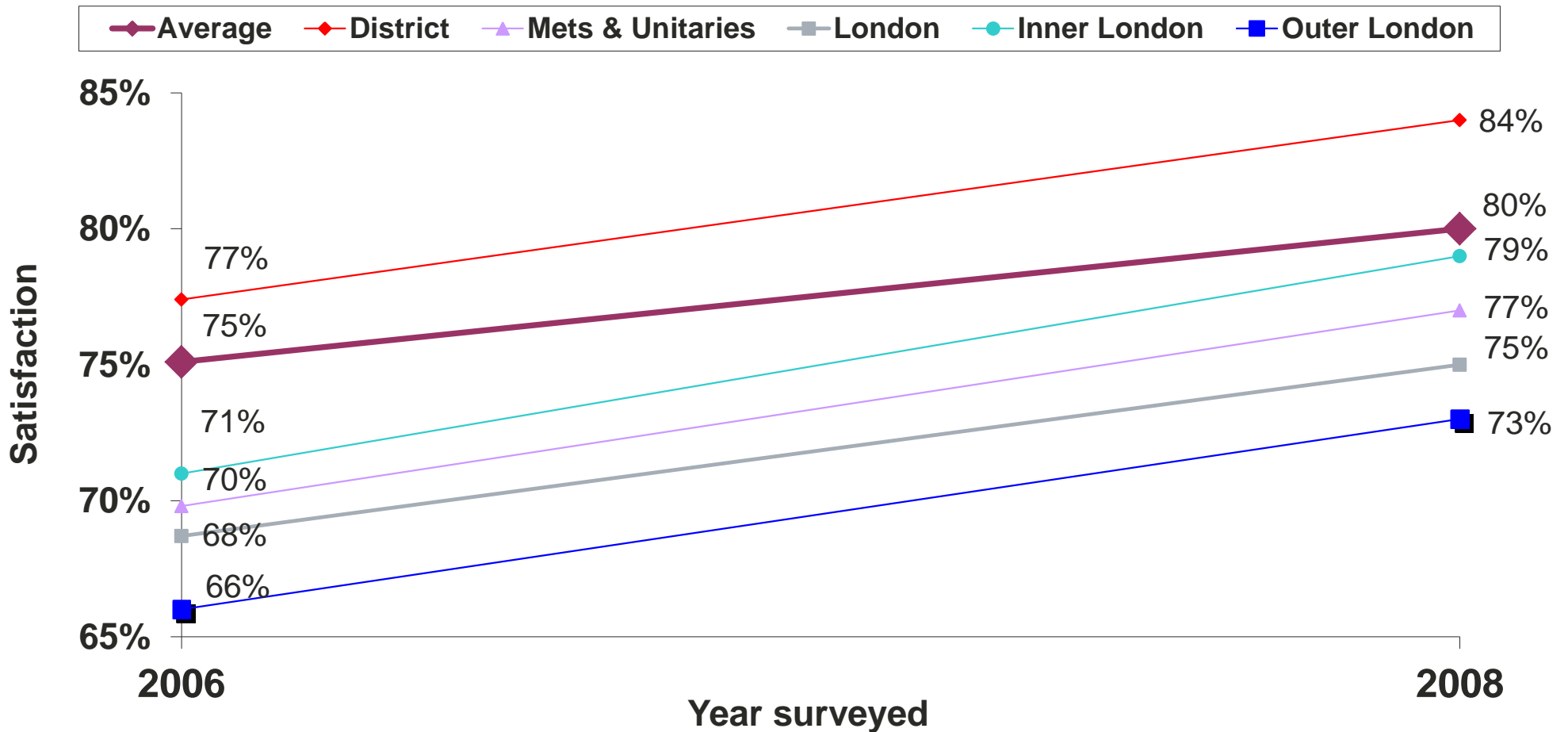
Source: Place Survey 2008/09 (352 local authorities), BVPI 2006 and 2003 (387 local authorities)

Majority feel they belong to their local area; slightly more to the country - consistent throughout 2000s

How strongly do you feel you belong to...?

Legend: ■ Very strongly ■ Fairly strongly

Neighbourhood

Year	Very strongly	Fairly strongly	Total
2003	27	43	70
2005	31	43	74
2007-08	34	41	75
2008-09	37	40	77
2009-10	36	41	76
2010-11	37	41	78

Local area

Year	Very strongly	Fairly strongly	Total
2007-08	26	45	72
2008-09	28	45	72
2009-10	33	43	76

Britain

Year	Very strongly	Fairly strongly	Total
2003	50	36	85
2005	51	35	86
2007-08	45	39	84
2008-09	45	39	84
2009-10	50	37	87
2010-11	51	37	88

Per cent

Base: Core sample in England (2003: 8,837, 2005: 9,129, 2007-08: 8,743, 2008-09: 8,690 2009-10: 8,664, 2010-11: 10,307)

Source: Ipsos MORI/DCLG, *Citizenship Survey*, 2011

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Almost all enjoy living in their local neighbourhood

Legend: ■ Yes, to some extent   ■ Yes, definitely

	2001	2003	2005	2007-08	2008-09	2009-10
Total	93	93	94	94	93	94
Yes, definitely	67	63	65	65	67	68
Yes, to some extent	26	30	29	28	27	26

Per cent
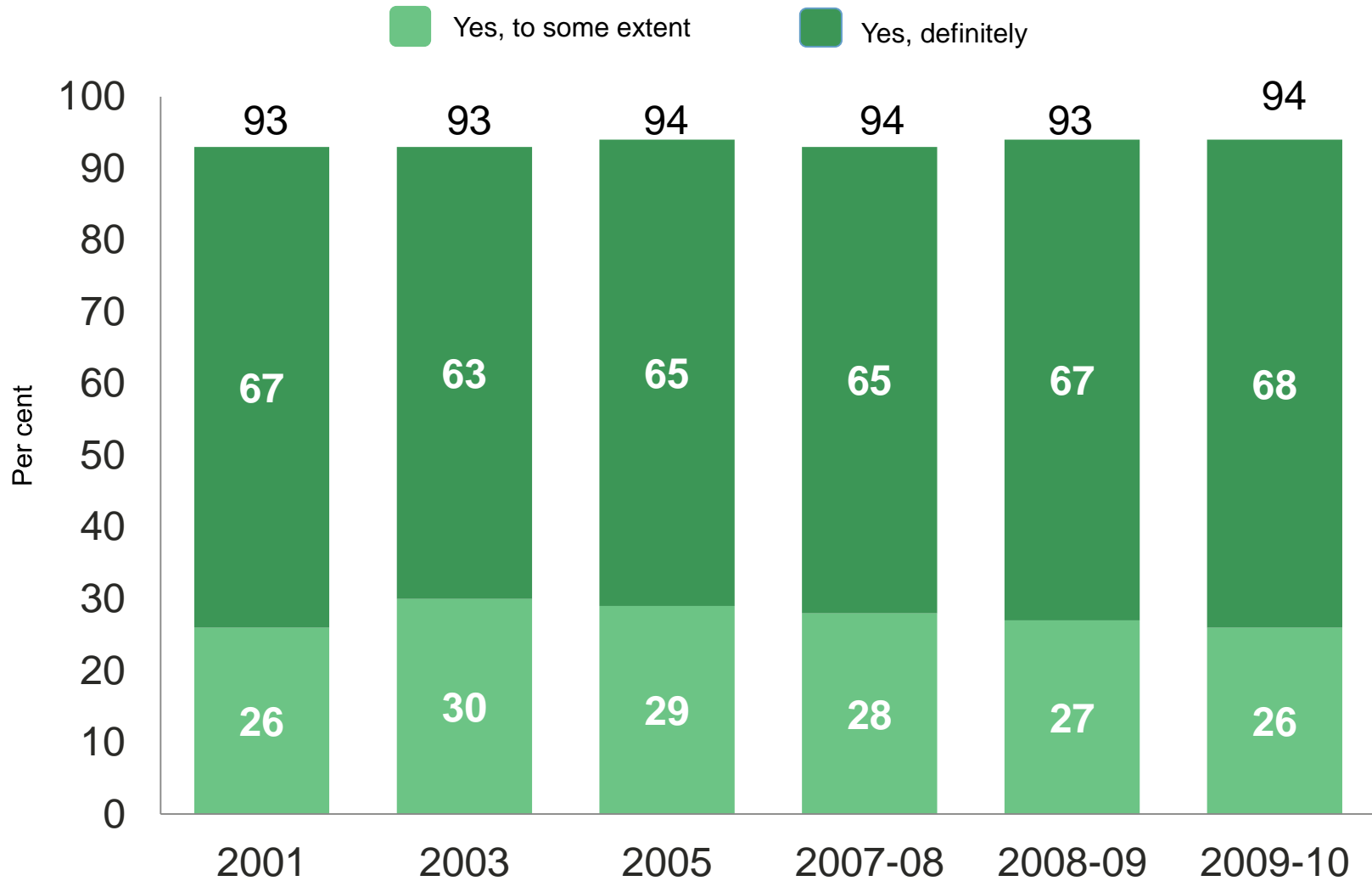
Base: Core sample in England (2001: 9,411, 2003: 8,917, 2005: 9,182, 2007-08: 8,792, 2008-09: 8,763, 2009-10: 8,709)

Source: Ipsos MORI/DCLG, *Citizenship Survey,* 2011

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Majority agree that local people pull together to improve their neighbourhood

To what extent would you agree or disagree that people in this neighbourhood pull together to improve the neighbourhood?

Legend: Definitely agree | Tend to agree

Year	Tend to agree	Definitely agree	Total
2003	47	18	65
2005	49	19	68
2007-08	48	20	68
2008-09	48	19	67
2009-10	47	20	67

Per cent
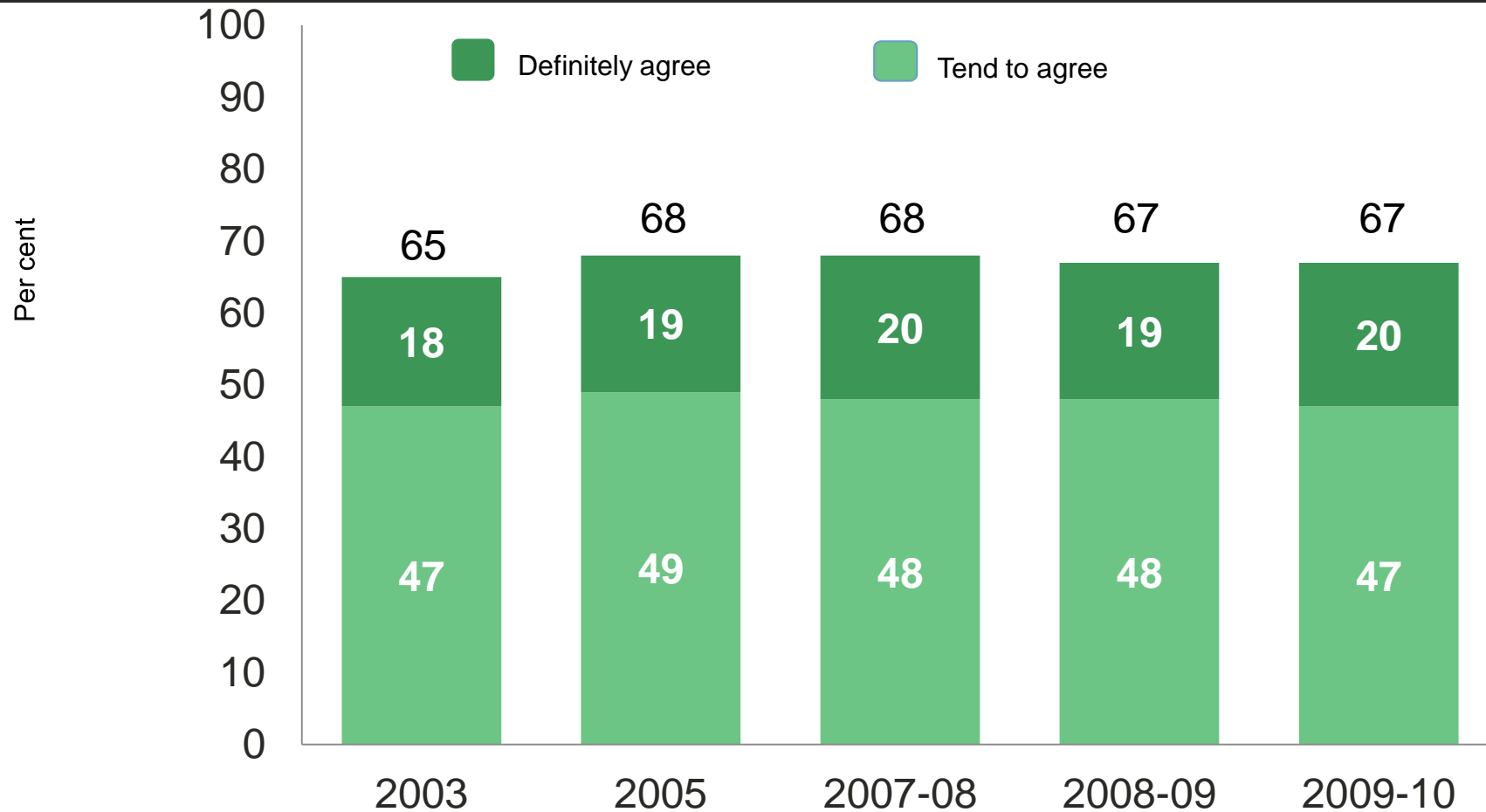
Base: Core sample in England (2003: 8,223, 2005: 8,504, 2007-08: 8,127, 2008-09: 7,928, 2009-10: 7,995)

Source: Ipsos MORI/DCLG, *Citizenship Survey,* 2011

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Majority agree people of different backgrounds get on well together locally

Proportion of people who agree that their local area is a place where people from different backgrounds get on well together

% agree

Per cent

Year	% agree
2003	80
2005	80
2007-08	82
2008-09	84
2009-10	85
2010-11	86
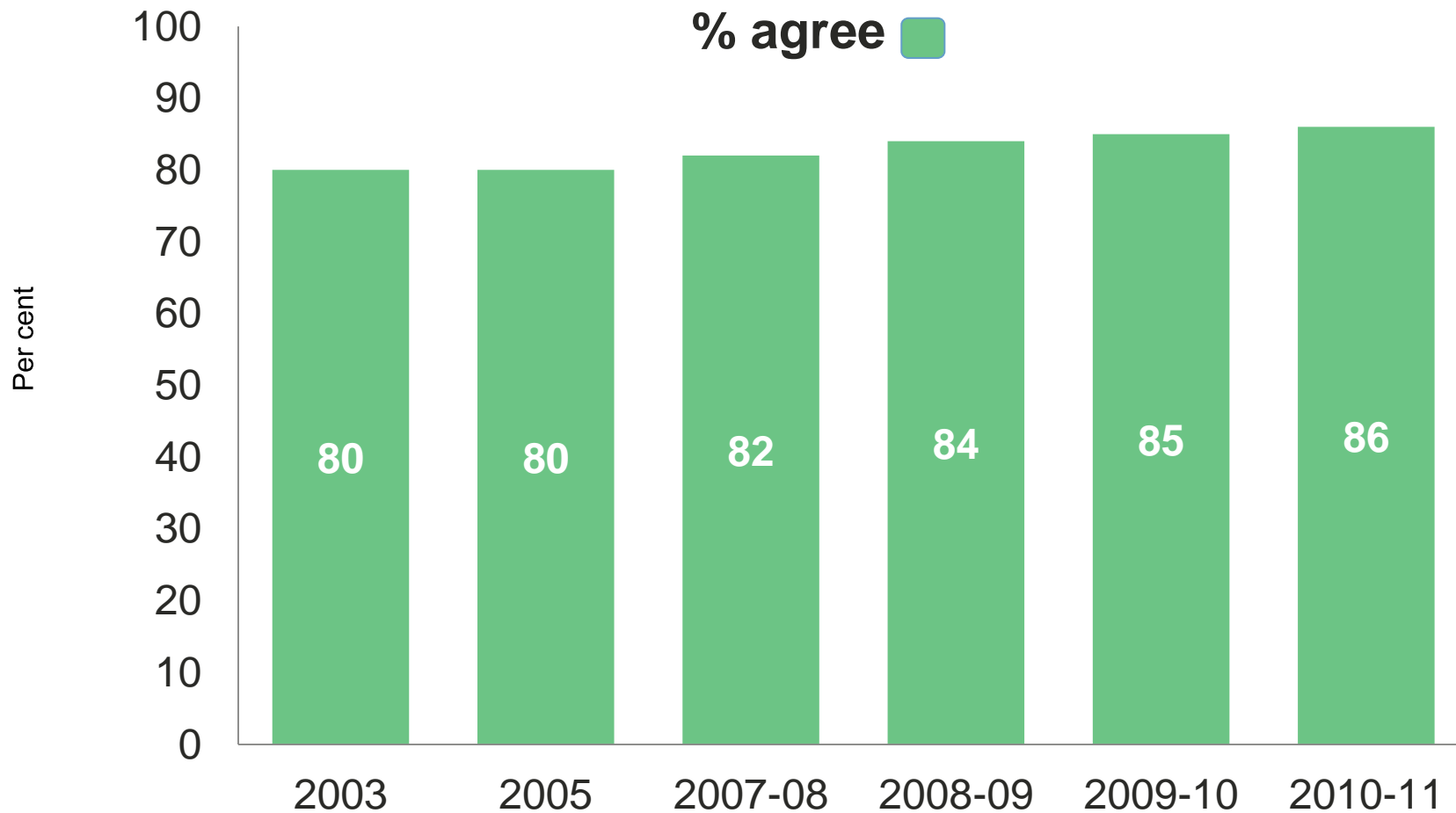
Base: Core sample in England (2003: 7,771, 2005: 8,045, 2007-08: 7,605, 2008-09: 7,447, 2009-10: 7,403, 2010-11: 10,307)

Source: Ipsos MORI/DCLG, *Citizenship Survey*, 2011

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Social mixing in public places is important

Proportion of people who have mixed socially with people from different ethnic or religious backgrounds in the last month

Category	Per cent
Any mixing (excluding at home)	82
Shops	64
Work, school or college	54
Pub, club, café or restaurant	45
Home or their home	36
Group, club or organisation you belong to	33
Formal volunteering	19
Child's crèche nursery or school	17
Place of worship	15
Informal volunteering	15

Per cent
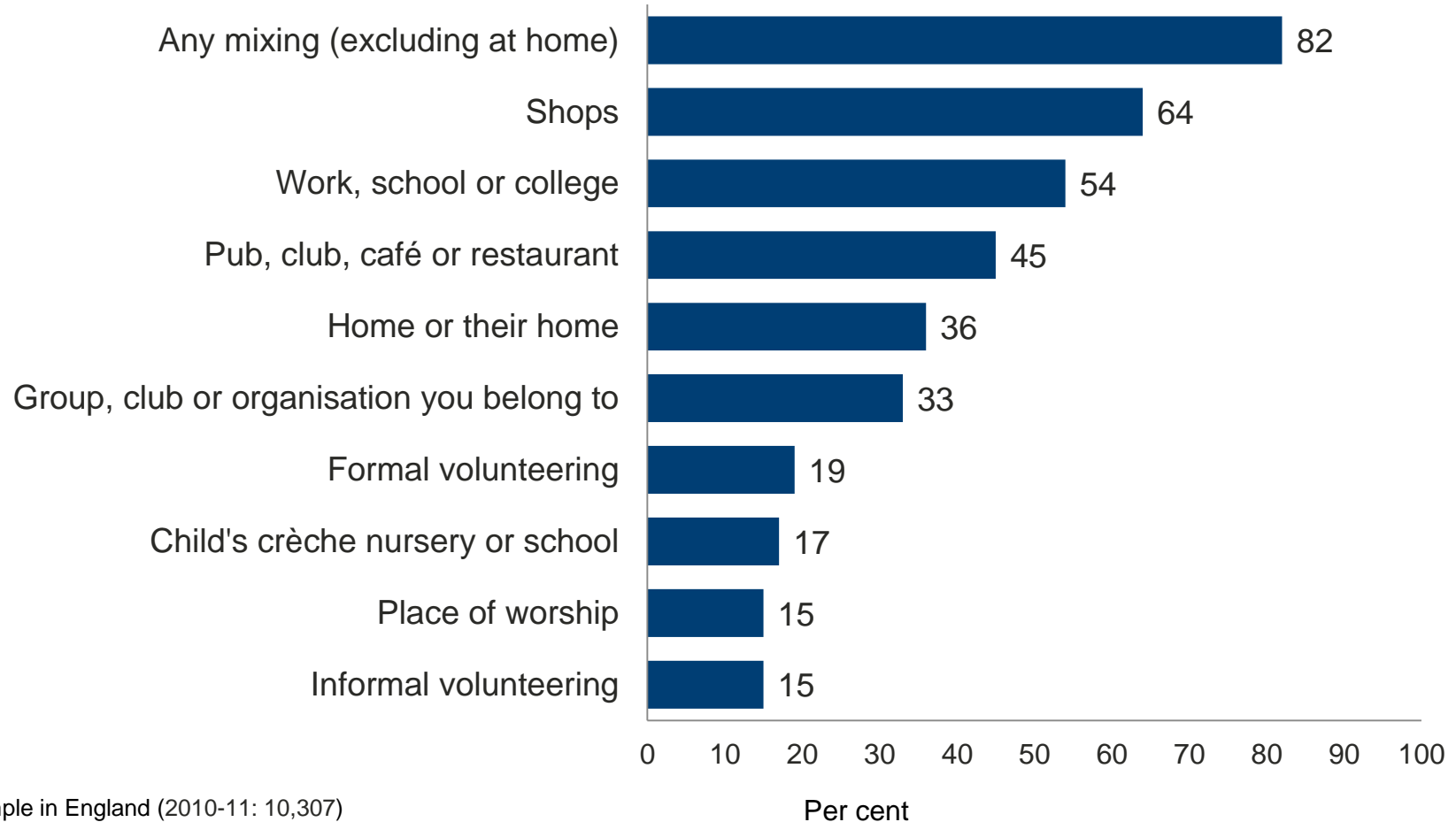
Base: Core sample in England (2010-11: 10,307)
Note: Respondents could suggest more than one place where they mixed socially

Source: Ipsos MORI/DCLG, *Citizenship Survey,* 2011

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- The World Values survey examines social trust, asking whether most people can be trusted or whether you can't be too careful [1]

  - 31% said most could be trusted in Britain (2005/07)

  - Lower than the USA (39%) and Germany (37%)

  - Higher than in Spain (20%), Poland (19%) and France (19%)

- According to the Citizenship Survey

  - In 2010/11, 36% of people trusted Parliament either 'a lot' or a 'fair amount', a rise since 2009/10 (29%) when the proportion had dropped relative to all previous years[2]

  - 64% of people trust their local council, higher than in all previous years[2]

Around one third of Britons think that they can trust other people...

Generally speaking, would you say that most people can be trusted or that you need to be very careful in dealing with people?

Social Trust

% Agree that most people can be trusted

Legend:
- USA
- Germany
- Britain
- Spain
- Poland
- France
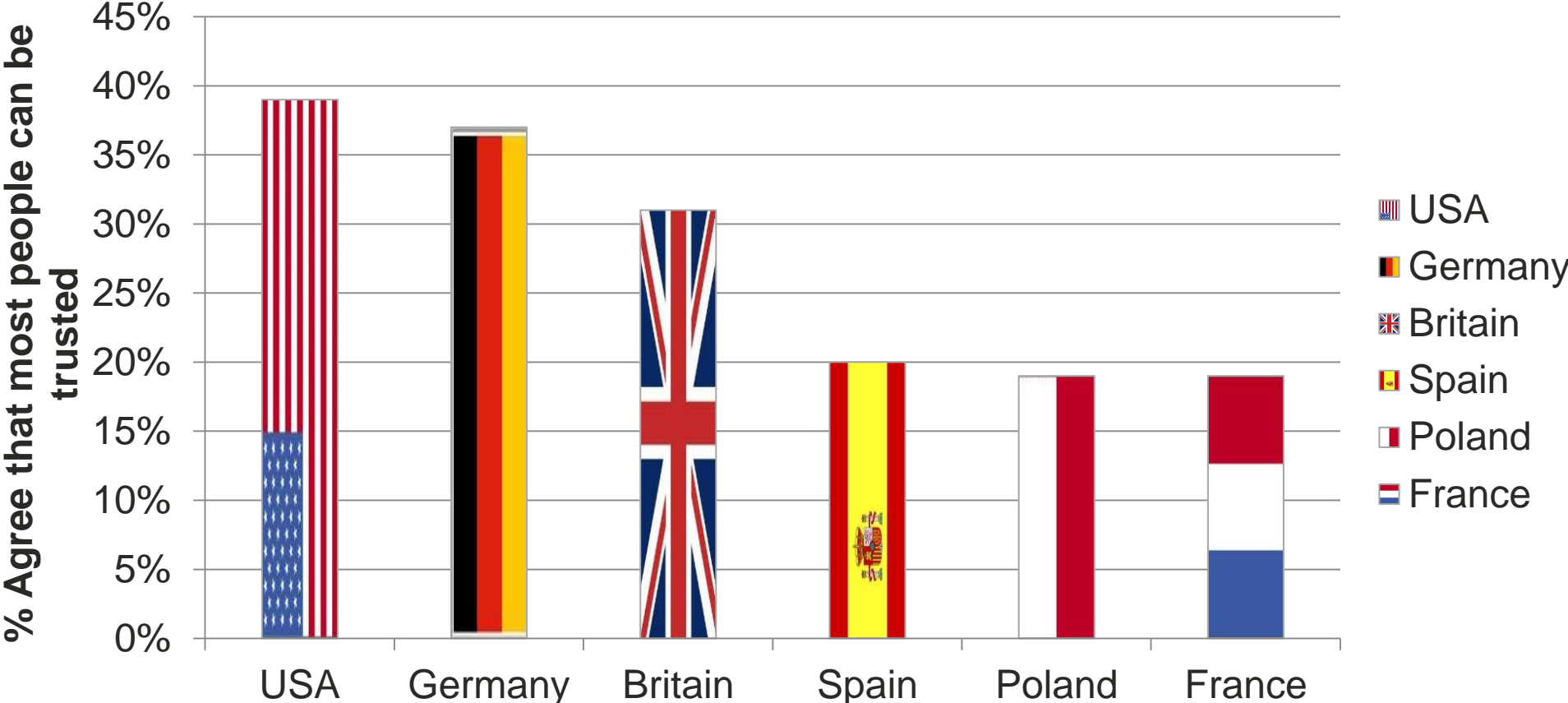
Source: World Values Survey quoted in Ipsos MORI's, *Our Nations Civic Health*, 2010

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Doctors and teachers represent the most trusted of professions; politicians and ministers the least...

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

Profession	% Not trust	% Trust
Doctors	8	88
Teachers	12	81
Professors	110	74
Judges	17	72
Scientists	17	71
Clergyman/Priests	20	68
The Police	27	63
Television News Readers	26	62
Social workers	25	60
The ordinary man/woman in	25	55
Civil Servants	34	47
Managers in the NHS	45	40
Pollsters	37	39
Trade Union officials	46	34
Local councillors	57	31
Business Leaders	55	29
Bankers	62	29
Managers in local	57	26
Journalists	70	19
Government Ministers	74	17
Politicians generally	80	14

■ % Not trust ■ % Trust

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Base: 1,026 United Kingdom adults aged 15+, 10-16 June 2011

Source: Ipsos MORI/BMA, 2011

9. Engagement and participation

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Community engagement and the 'Big Society'

- Despite high levels of satisfaction with where we live, few of us are active in our communities[1]

  - Around one in four people formally volunteer

  - Levels of involvement and feelings of empowerment have been static over the last decade, despite a wide range of initiatives
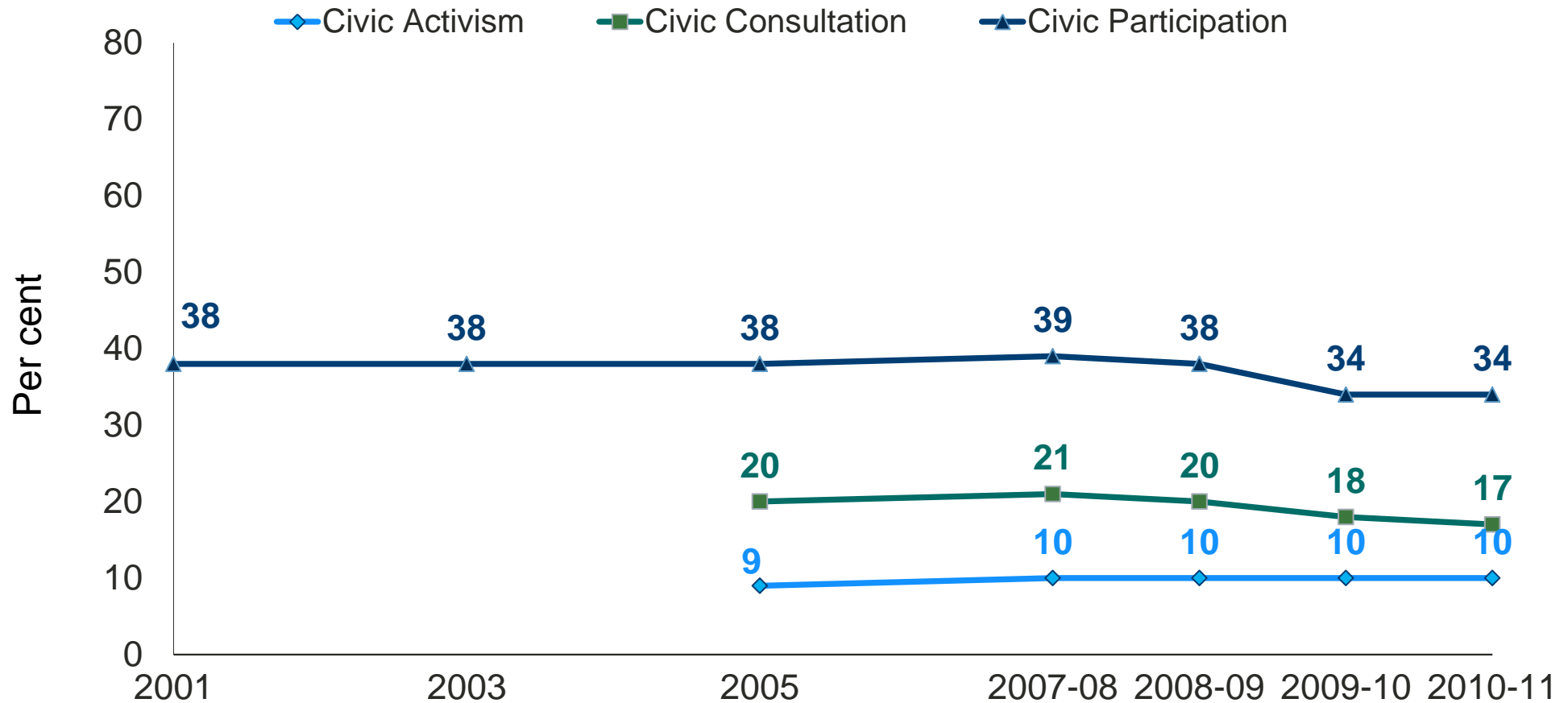
  - There are indications that informal volunteering is now on the decline

- Latest Hansard Society's survey shows only one in 10 definitely intended to do voluntary work in the next two years[2]

- Absence of community concern linked to a rise in the number of communities who do not know each other, due to immigration and internal migration and commuting for work[1]

- Deprivation, work status and levels of urbanity/ rurality are known to impact on likelihood of volunteering, along with life stage[1]

- All this represents a challenge in terms of building stronger, more active communities

Source: [1]Ipsos MORI/DCLG, *Citizenship Survey*, 2011
[2] Hansard Society, *Audit of Political Engagement 8,* 2011

Low numbers engaged in civic activities

In the last 12 months, have you taken part in a... about local services or problems in your local area

Legend: Civic Activism, Civic Consultation, Civic Participation

Civic Participation: 2001: 38, 2003: 38, 2005: 38, 2007-08: 39, 2008-09: 38, 2009-10: 34, 2010-11: 34

Civic Consultation: 2005: 20, 2007-08: 21, 2008-09: 20, 2009-10: 18, 2010-11: 17

Civic Activism: 2005: 9, 2007-08: 10, 2008-09: 10, 2009-10: 10, 2010-11: 10

Y-axis: Per cent (0 to 80)
X-axis: 2001, 2003, 2005, 2007-08, 2008-09, 2009-10, 2010-11

Base: Core sample in England, (2001: 9,430, 2003: 8,920, 2005: 9,195, 2007-08: 8,804, 2008-09: 8,768, 2009-10: 8,712, 2010-11: 10,307)

Source: Ipsos MORI/DCLG, *Citizenship Survey,* 2011

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Is informal volunteering on the decline?

Proportion who have given any unpaid help to non-relatives in the last 12 months

Legend: —◆— Once a month   —■— At least once in the last year

Y-axis: Per cent (0 to 80)

At least once in the last year: 67, 63, 68, 64, 62, 54, 55
Once a month: 34, 37, 37, 35, 35, 29, 29

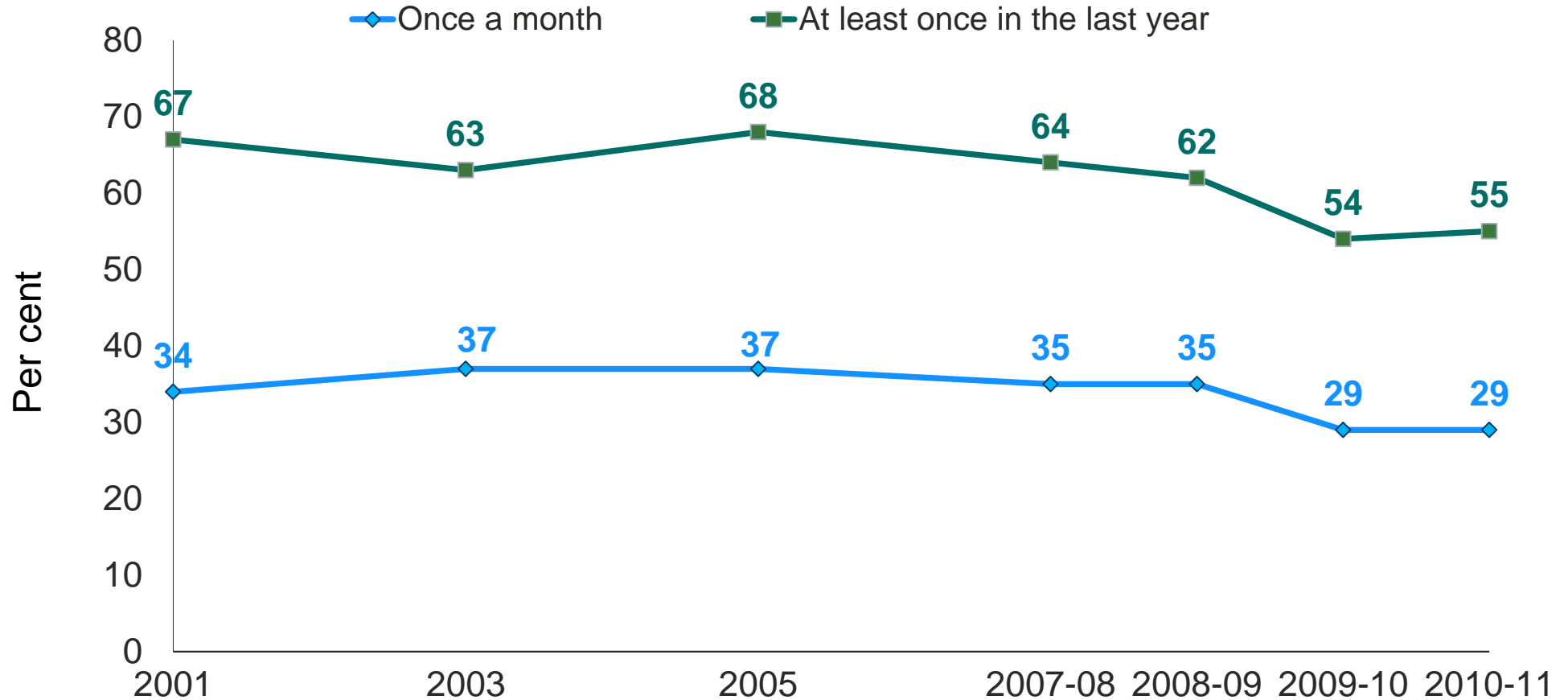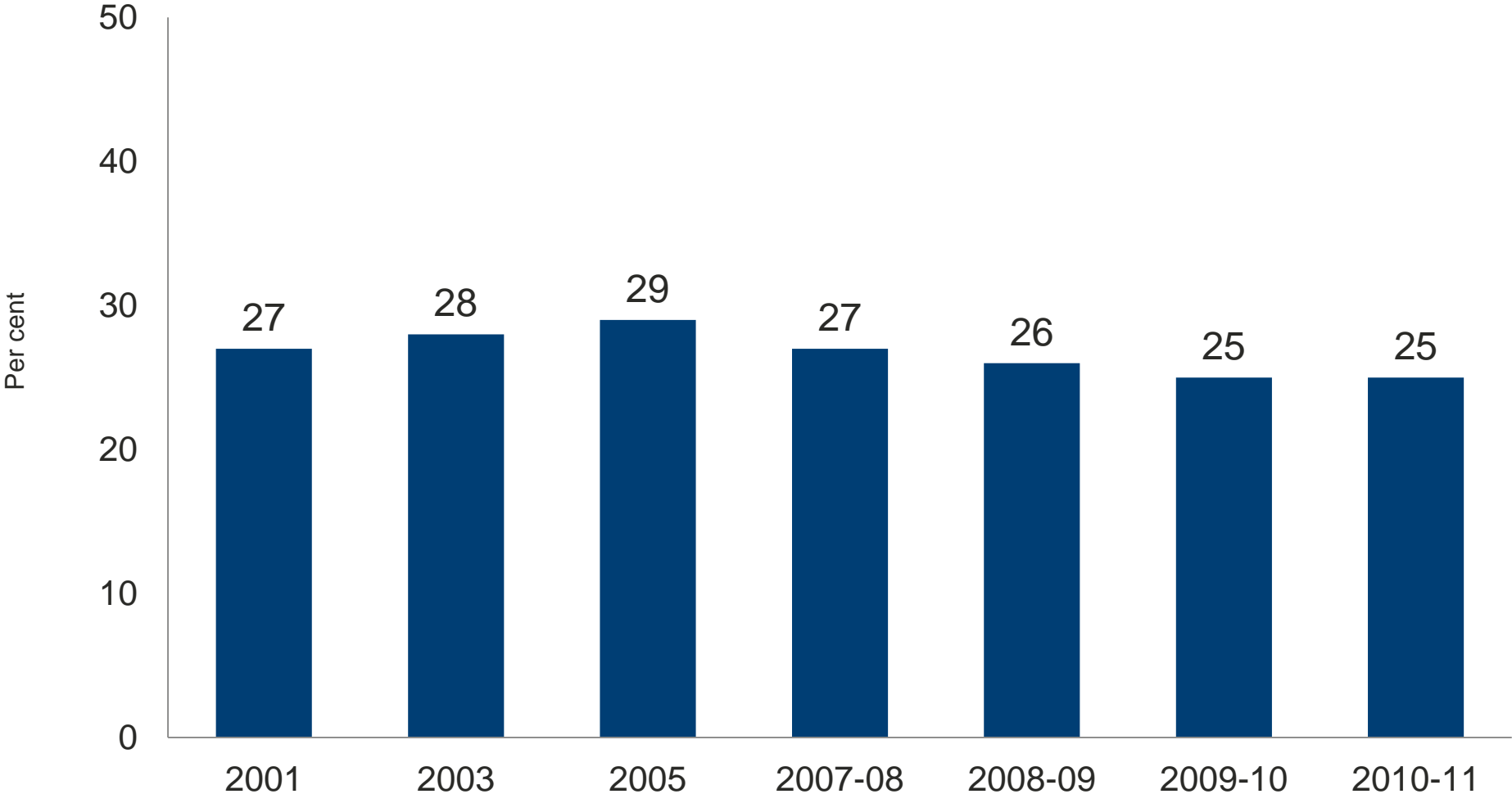X-axis: 2001, 2003, 2005, 2007-08, 2008-09, 2009-10, 2010-11

Base: Core sample in England, (2001: 9,430, 2003: 8,920, 2005: 9,195, 2007-08: 8,804, 2008-09: 8,768, 2009-10: 8,712, 2010-11: 10,307)

Source: Ipsos MORI/DCLG, *Citizenship Survey,* 2011

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Around one in four formally volunteers

In the last 12 months have you given unpaid help to any organisations?

Per cent

Year	Value
2001	27
2003	28
2005	29
2007-08	27
2008-09	26
2009-10	25
2010-11	25

Base: Core sample in England (2001: 9,430; 2003: 8,922; 2005: 9,195; 2007-08: 9,8,804;
2008-09: 8,768; 2009-10: 8,712, 2010-11: 10,307)

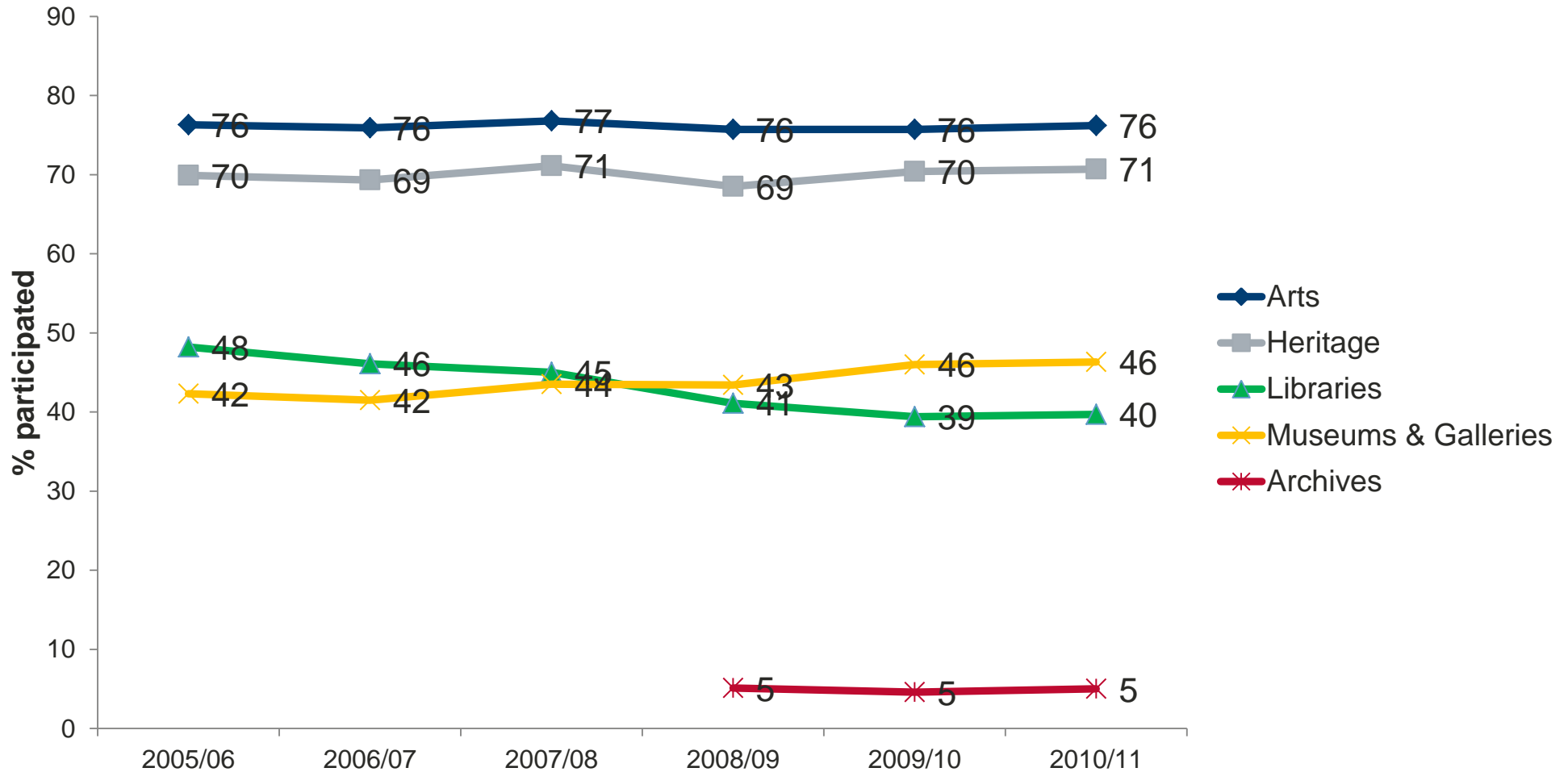Source: Ipsos MORI/DCLG, *Citizenship Survey*, 2011

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Participation in cultural sector

- Participation in culture is highest for the arts; lower for libraries

- Much fewer actively volunteer in the sector

  - These volunteers tend to be older, over 45, women and non-workers

  - They are also more engaged in their local community already

    - i.e. they are more likely to believe they have some degree of influence over local cultural facilities and the environment as a whole than the general population

- The Taking Part Survey (2011) suggests that the cultural sector is less accessible to volunteers than sports, although people are more likely to give money to cultural organisations than to sports ones

Source: DCMS, *Taking Part Survey*, 2005-2011

Participation in culture highest for the arts

In the last 12 months, have you done any of these activities?

Arts: 2005/06: 76, 2006/07: 76, 2007/08: 77, 2008/09: 76, 2009/10: 76, 2010/11: 76

Heritage: 2005/06: 70, 2006/07: 69, 2007/08: 71, 2008/09: 69, 2009/10: 70, 2010/11: 71

Libraries: 2005/06: 48, 2006/07: 46, 2007/08: 45, 2008/09: 41, 2009/10: 39, 2010/11: 40

Museums & Galleries: 2005/06: 42, 2006/07: 42, 2007/08: 44, 2008/09: 43, 2009/10: 46, 2010/11: 46

Archives: 2008/09: 5, 2009/10: 5, 2010/11: 5

y-axis: % participated

Legend: Arts, Heritage, Libraries, Museums & Galleries, Archives

Source: DCMS, *Taking Part Survey*, 2005-2011

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Was this (the volunteering) connected to any of the following areas?

% volunteered

Legend:
- Arts
- Heritage
- Libraries
- Museums & Galleries
- Archive
- Sport

Data points:

Area	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11
Sport	19	19	20	21	20	21
Arts	6	6	7	6	8	8
Heritage	5	4	4	5	4	4
Museums & Galleries	1	1	1	1	1	2
Archive	1	1	1	1	1	1
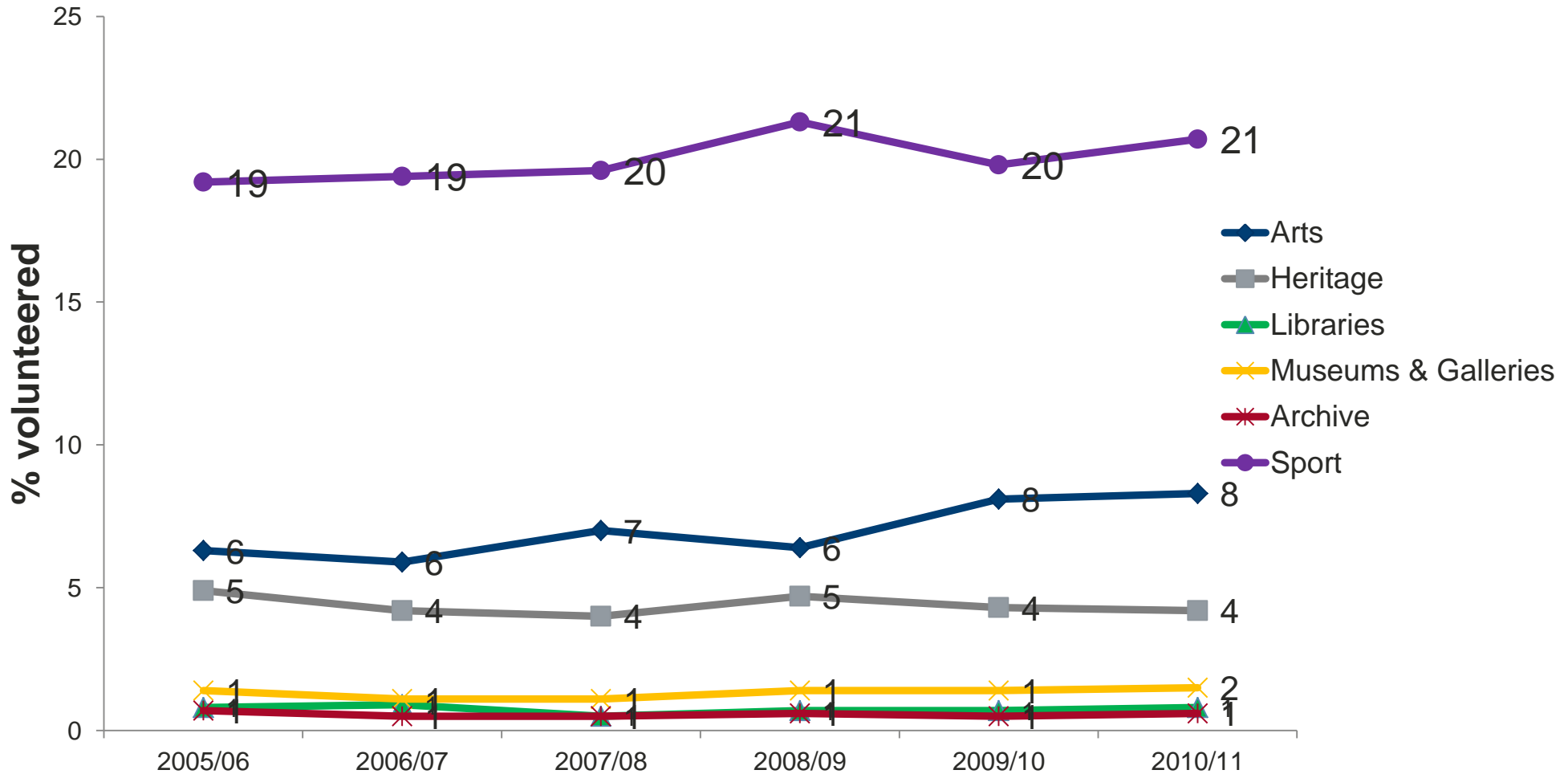
Source: DCMS, *Taking Part Survey*, 2005-2011

Majority of money that people donate to cultural and sporting sectors goes to heritage organisations

In the last 12 months, have you donated any money in any of the following ways?
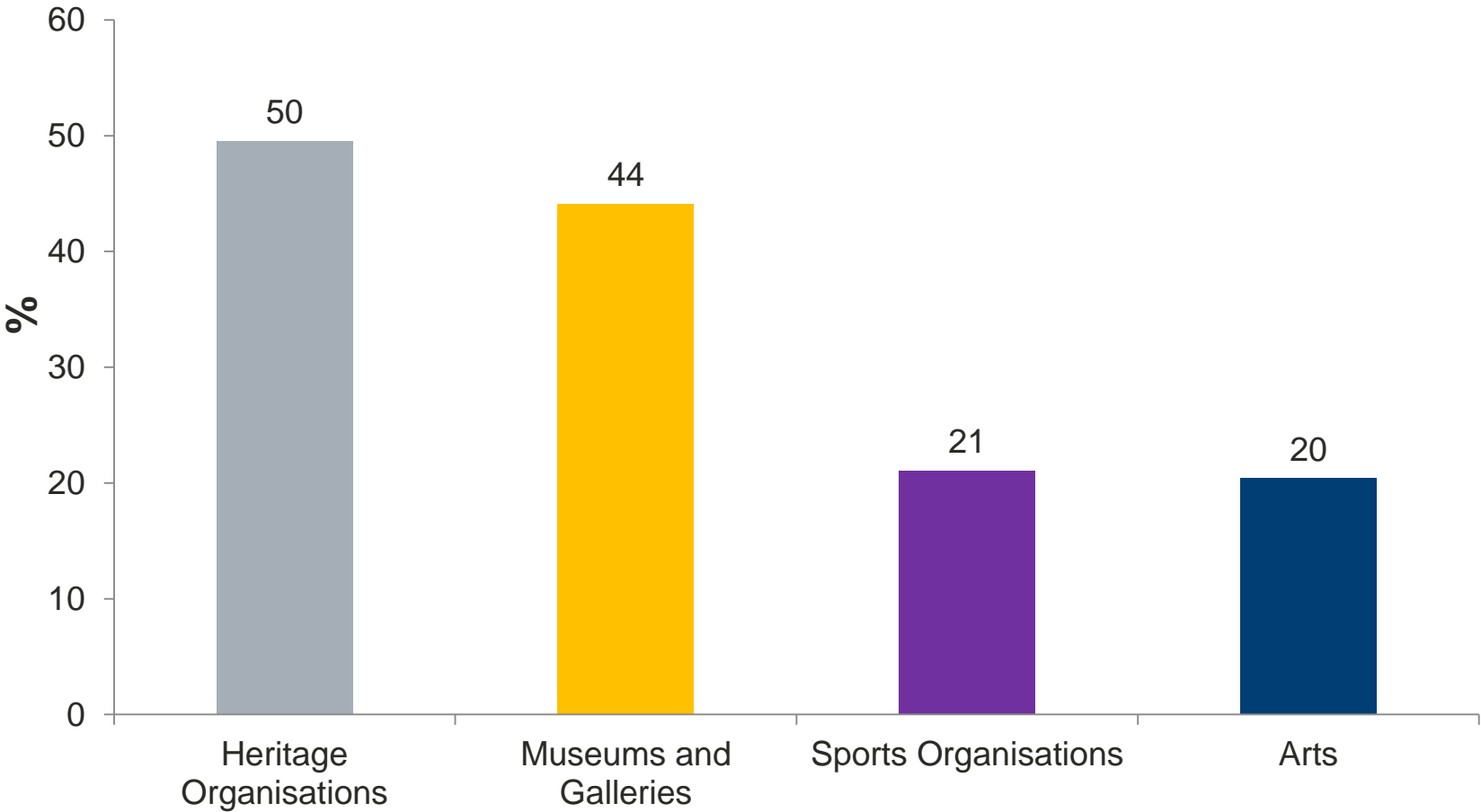
Source: DCMS, *Taking Part Survey*, 2005-2011

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- We like the idea of greater control and localism - in principle the public seems supportive of the idea of getting more involved in their local community and local public services…[1]

- … but the reality is often different

- While we don't mind being involved in quick, easy activities, we're not so keen on more time consuming ones: [2]

  - For example, a majority say they would be willing to do a quick favour or chore for an elderly neighbour or clear a footpath outside their home

  - But, far fewer would be willing to help out at a local public library or help run and manage a local public library

  - Suggests that most will need more than a "nudge" to go further on individual responsibility/ big society…

  - … that only a very small minority might be interested in helping to support running of local public services

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No clear view on the role of the State and local communities when it comes to improving public services

To what extent do you agree or disagree with each of the following statements:

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

People in Britain should get more involved in helping improve our public services and local areas

| 49 | 37 | 6 | |

I should get more involved in helping improve our public services and local areas*

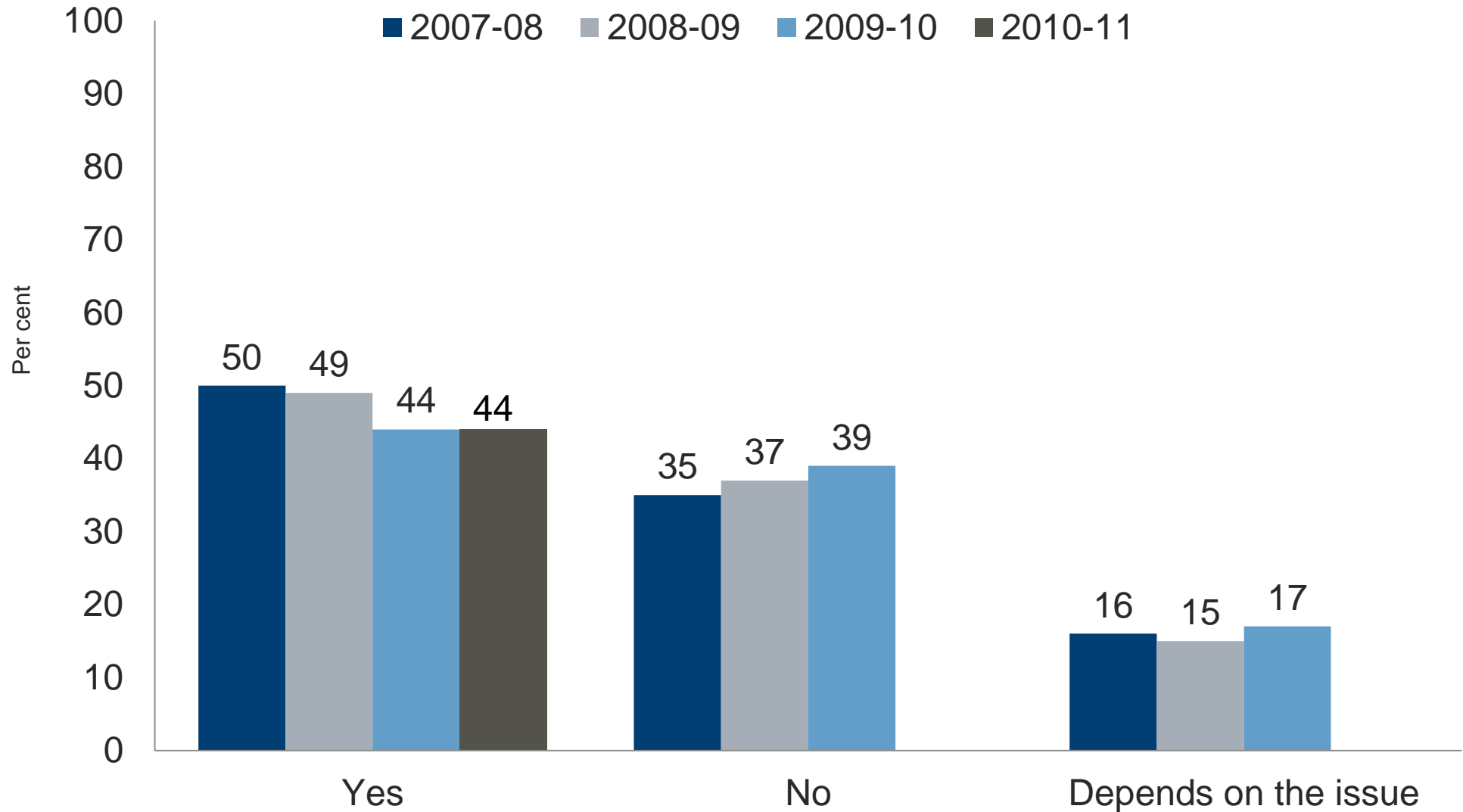| 28 | 40 | 13 | 9 |

The government is responsible for improving public services and local areas, they shouldn't be calling on the public to help**

| 32 | 28 | 21 | 10 |

Base: 417 British adults 18+   *Base: 420 British adults 18+   **Base: 416 British adults 18+
Fieldwork: 18-19 April 2010

Source: Ipsos MORI/Economist, *Issues Index,* 2010

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Reflecting decline in volunteering, we see a fall in willingness to be more involved in council decisions affecting the local area

Legend: 2007-08 | 2008-09 | 2009-10 | 2010-11

Per cent

Yes: 50, 49, 44, 44
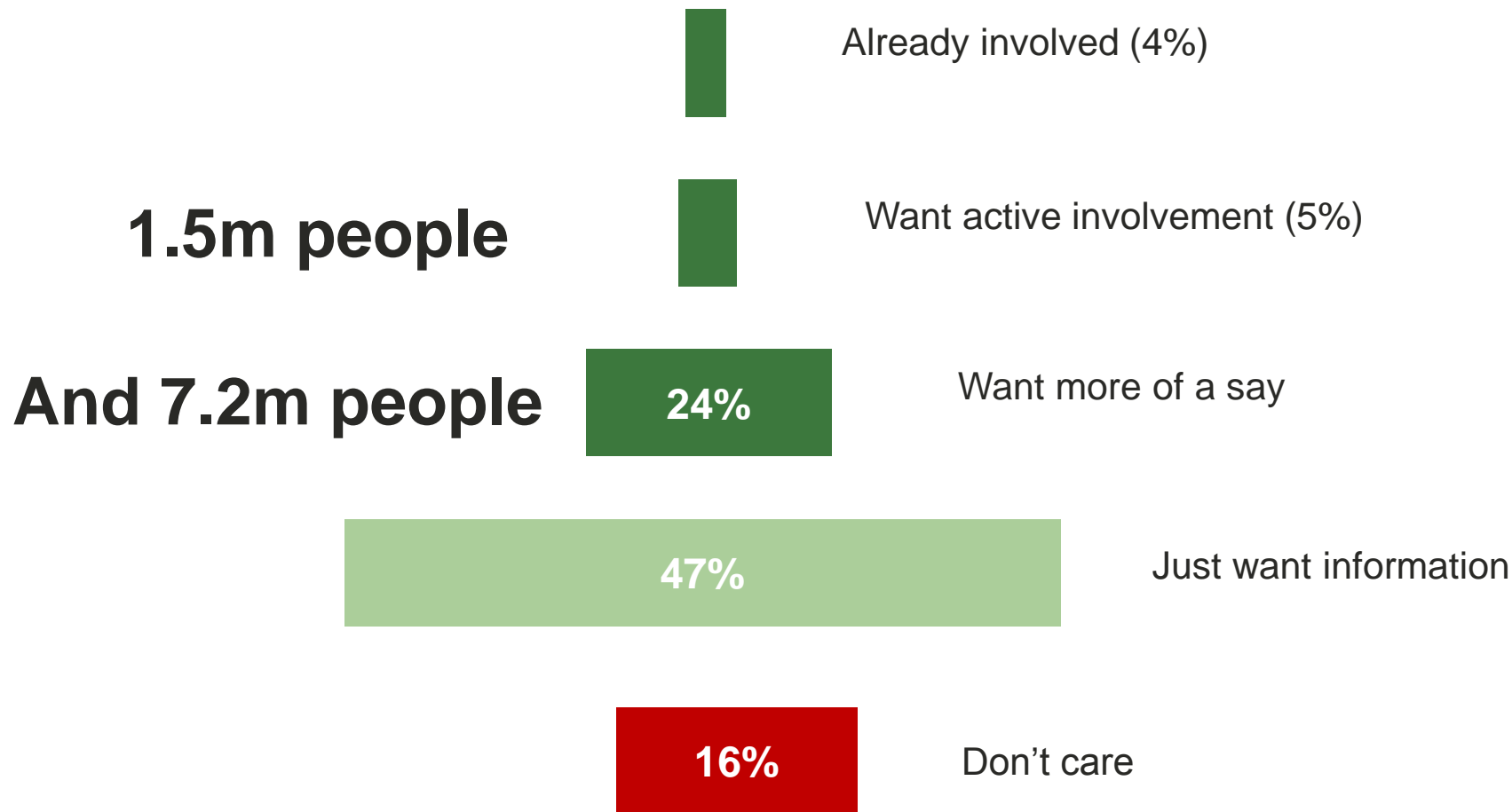**No:** 35, 37, 39
Depends on the issue: 16, 15, 17

Base: Core sample in England (2007-08: 8,780, 2008-09: 8,748, 2009-10: 8,700 , 2010-11: 10,307)

Source: Ipsos MORI/DCLG, *Citizenship Survey*, 2011

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Many are interested in having more of a say, but most just passive recipients

Levels of involvement/ interest in involvement in local services

Already involved (4%)

1.5m people

Want active involvement (5%)

And 7.2m people

24% Want more of a say

47% Just want information

16% Don't care

Base: 1,896 GB adults, 18+. Sept 2008

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Quick and easy local tasks are most likely to be completed

Q   *How likely or unlikely would you be to do the following . . .*

■ % Certain to   ■ % Very likely   ■ % Fairly likely   ■ % Neither / nor
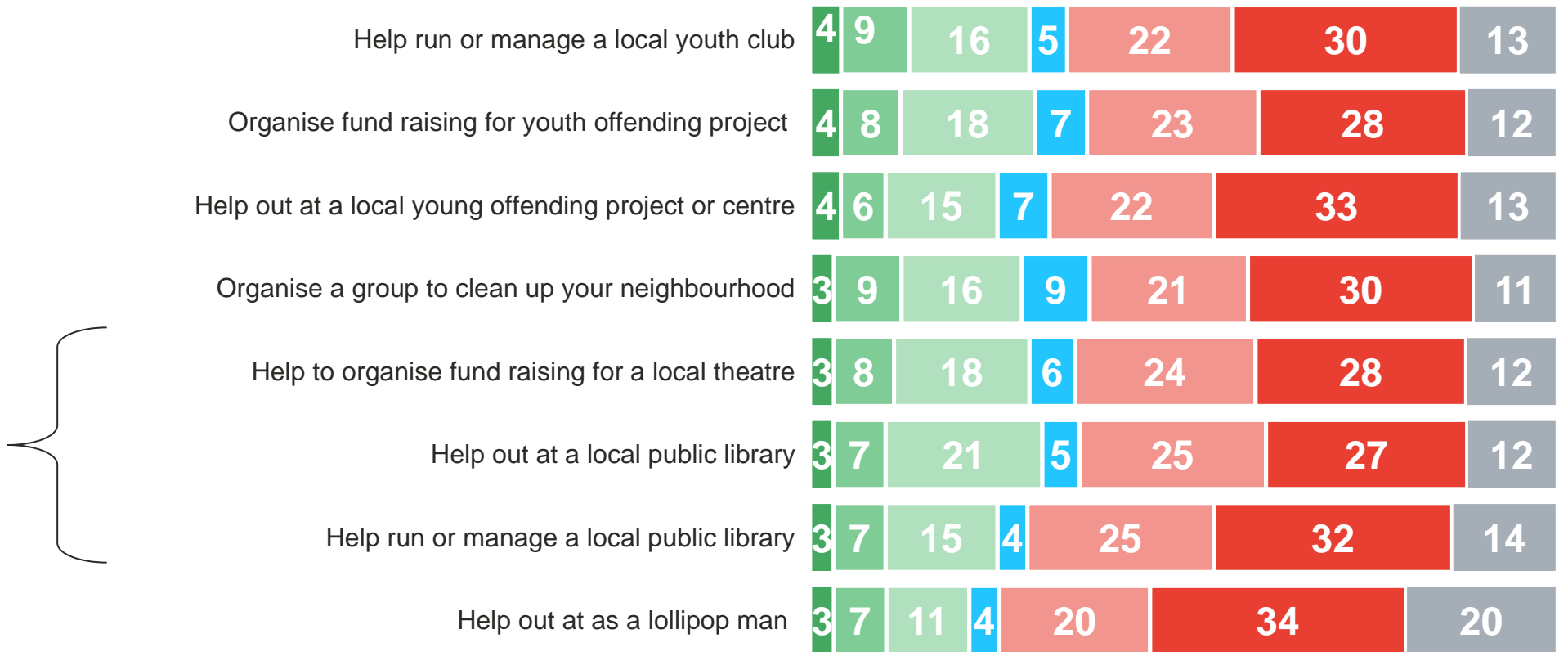■ % Fairly unlikely   ■ % Very unlikely   ■ % Don't know

Task	% Certain to	% Very likely	% Fairly likely	% Neither/nor	% Fairly unlikely	% Very unlikely	% Don't know
Do a quick favour or chore for an elderly neighbour	25	37	27	3	2	3	2
Clear the public footpath outside of your home	23	33	21	3	5	8	7
Take an elderly neighbour to doctor's surgery	16	26	28	4	9	11	5
Organise fund raising for a local school or youth club	8	18	28	4	16	17	8
Help out at a local day centre for older people	7	14	19	5	21	25	9
Clear the public footpath outside of local facilities	6	13	20	7	17	24	12
Mentor a young offender	5	9	18	7	21	28	12

Base: 1,003 British adults, fieldwork dates: 15th – 17th April 2011
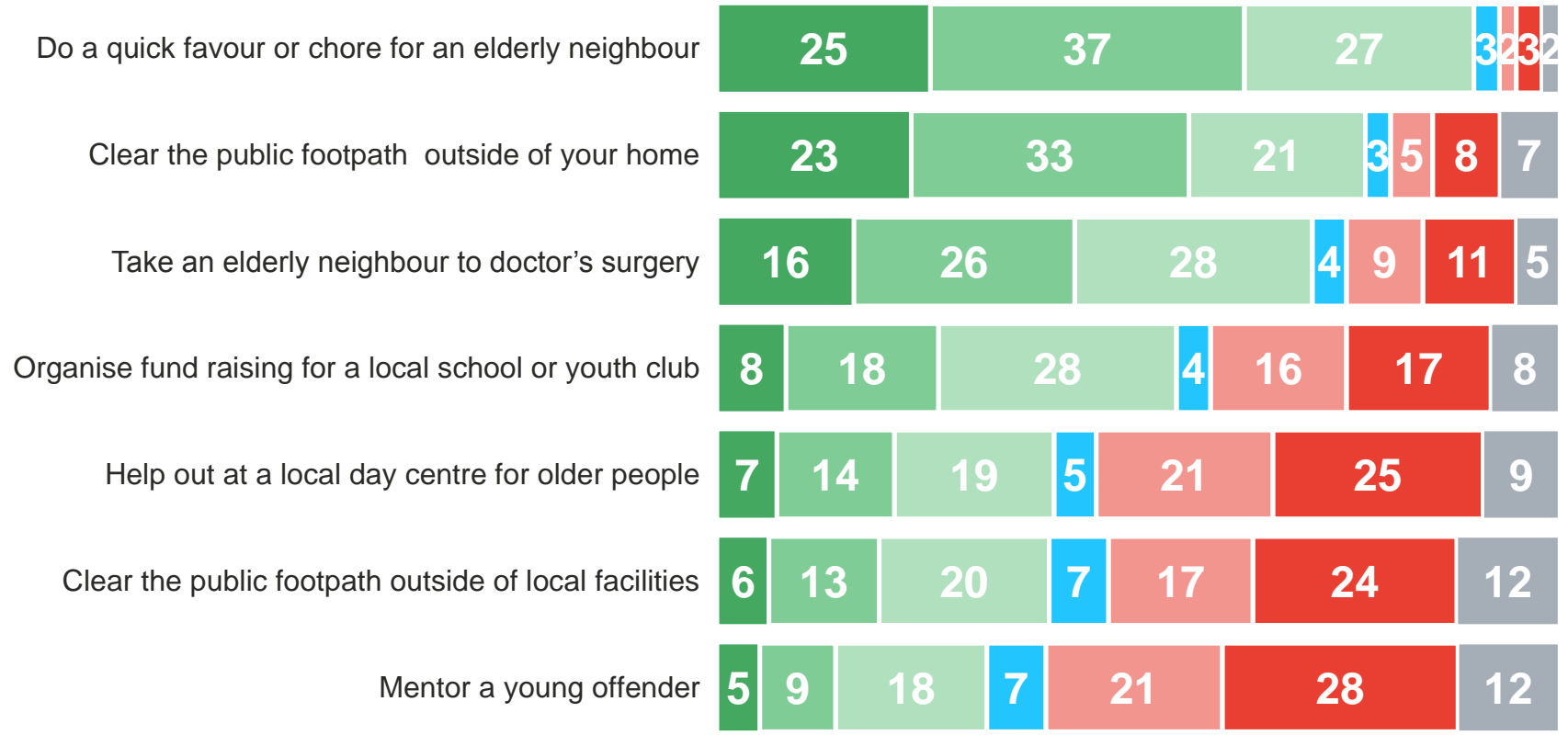
Source: NLGN/Groundwork/Ipsos MORI, 2011

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Most people are unlikely to help out or run their local library or theatre

Q   *How likely or unlikely would you be to do the following . . .*

- ■ % Certain to
- ■ % Very likely
- ■ % Fairly likely
- ■ % Neither / nor
- ■ % Fairly unlikely
- ■ % Very unlikely
- ■ % Don't know

	Certain to	Very likely	Fairly likely	Neither/nor	Fairly unlikely	Very unlikely	Don't know
Help run or manage a local youth club	4	9	16	5	22	30	13
Organise fund raising for youth offending project	4	8	18	7	23	28	12
Help out at a local young offending project or centre	4	6	15	7	22	33	13
Organise a group to clean up your neighbourhood	3	9	16	9	21	30	11
Help to organise fund raising for a local theatre	3	8	18	6	24	28	12
Help out at a local public library	3	7	21	5	25	27	12
Help run or manage a local public library	3	7	15	4	25	32	14
Help out at as a lollipop man	3	7	11	4	20	34	20

Base: 1,003 British adults, fieldwork dates: 15th – 17th April 2011

Source: NLGN/Groundwork/Ipsos MORI, 2011

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10. The economy and consumer behaviour

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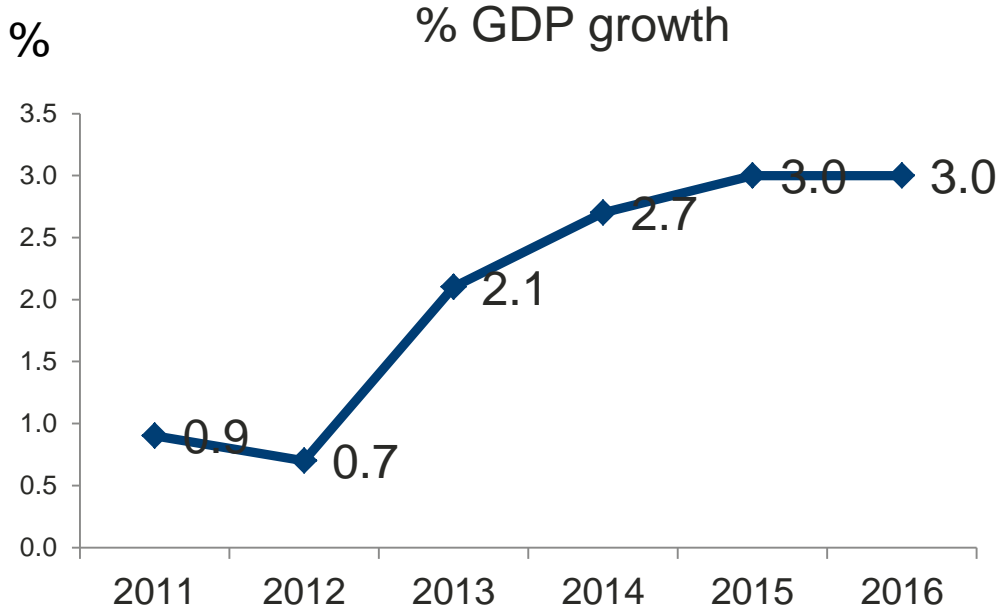# Negative outlook for the economy continues

- There are expectations that the labour market will continue to weaken over the coming year, reflecting the weaker outlook for economic growth [1]

- Public sector net borrowing is expected to drop steadily as a share of GDP over the next five years from its post war peak in 2009/10 (11.2% of GDP) [1]

- Public sector net debt is expected to rise from 67.3% of GDP this year to a peak of 76.3% in 2014/15, falling thereafter [1]

- The public remains pessimistic about the economic outlook

  - Around six in 10 cite the economy as the most important issue facing Britain today [2]

  - In the UK we are among the least likely globally to think that our economy will be stronger in the next six months [3]

Source: [1] Office for Budget Responsibility, *Economic and Fiscal Outlook*, November 2011/ March 2012

[2] Ipsos MORI *Monthly Issues Index,* 2012

[3] Ipsos Global @dvisor, 2011

% GDP growth

%

3.5

3.0 — 3.0 — 3.0

2.5

2.7

2.1

2.0

1.5

1.0 — 0.9

0.5 — 0.7

0.0

2011 2012 2013 2014 2015 2016

Source: Office for Budget Responsibility, *Economic and Fiscal Outlook*, November 2011

Net debt as a percentage of GDP excluding financial interventions

%

65
60
55
50
45
40
35
30
25

1999 2001 2003 2005 2007 2009 2011
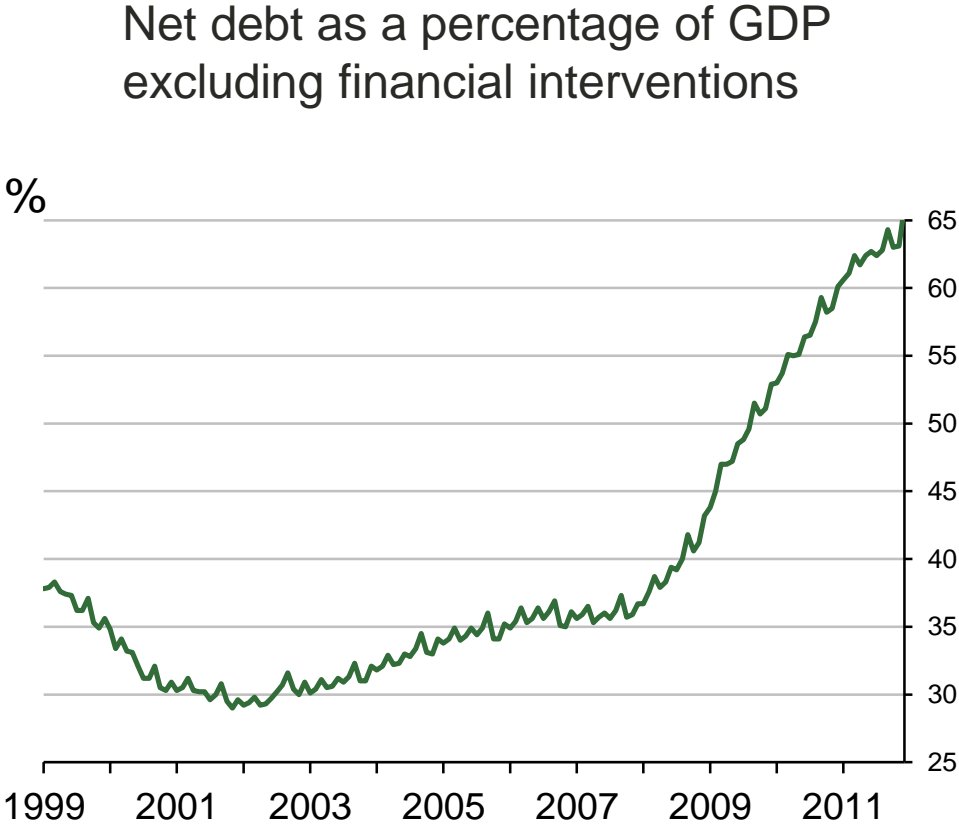
Source: ONS, *Public Sector Finances March 2012*, April 2012
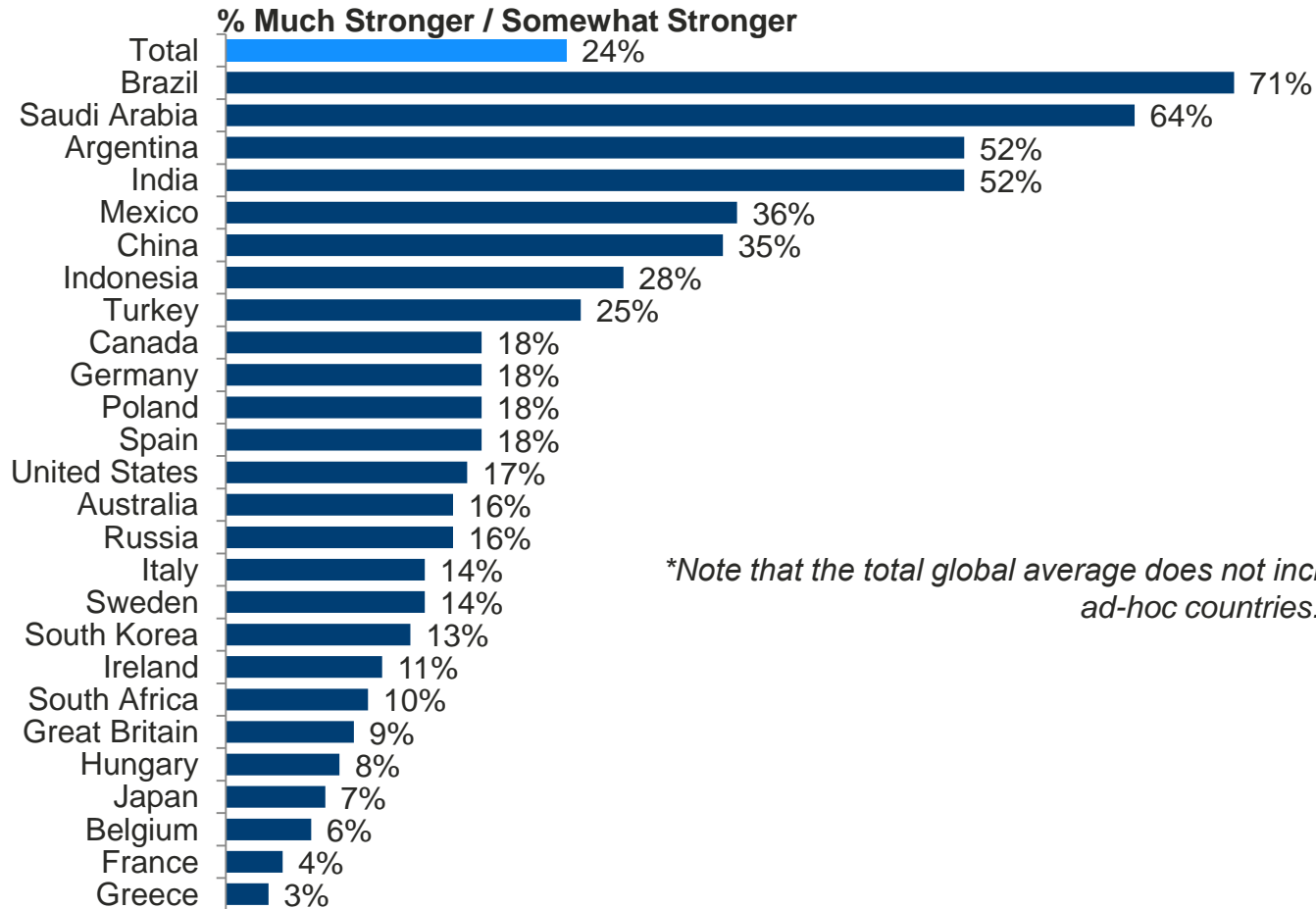
Q What do you see as the most/other important issues facing Britain today?
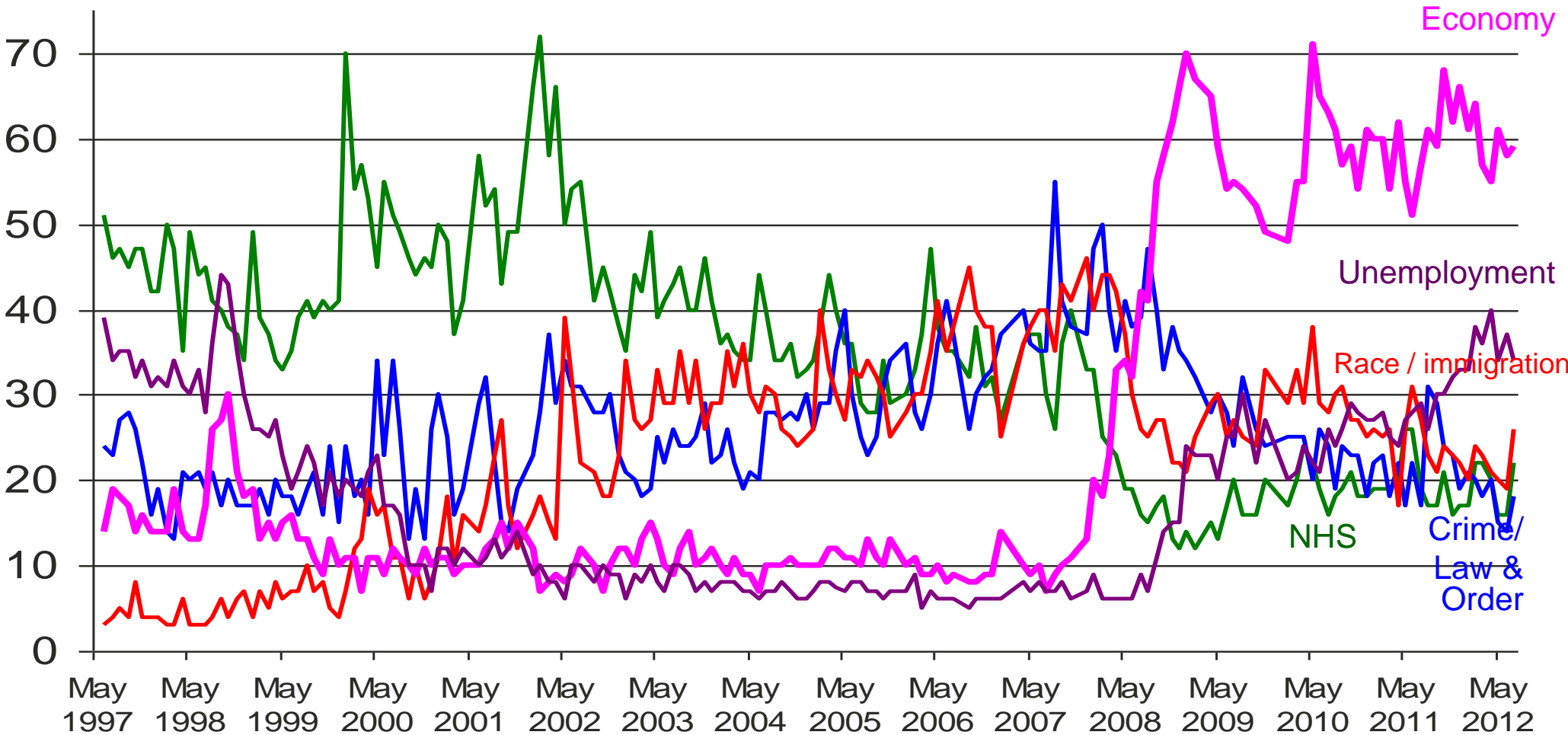
Base: representative sample of c.1,000 British adults age 18+ each month, interviewed face-to-face in home

Source: Ipsos MORI Issues Index

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A HISTORY OF BRITISH
ECONOMIC WORRY

Prime Minister in office ○   ○ Tony Blair   ○ Gordon Brown   ○ David Cameron

WHAT DO YOU SEE AS THE MOST IMPORTANT ISSUES FACING BRITAIN TODAY?

80%

○ Black Wednesday
Pound exits ERM

Bank bailout ○

Highest score since 1992, most
important issue for first time

economy

60%

End of recession
announced

○ Global Recession &
Russian Financial crisis

Northern Rock
nationalised

40%

unemployment

Sub-prime mortgage ○
crisis in the US

20%

1987 1988 1989 1990 1991 1992 1993 1994 1995 1996 1997 1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012

TOP ISSUE TIMELINE   WHAT ELSE HAVE BRITONS BEEN MOST WORRIED ABOUT?

unemployment
NHS
economy
defence
crime
immigration

TOP 5 ISSUES OVER THE YEARS

**THE IPSOS MORI
ISSUES INDEX**

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?

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

**FEBRUARY
1994**

UNEMPLOYMENT
NHS
crime
economy
education

**FEBRUARY
2000**

NHS
education
Europe
unemployment
crime

**FEBRUARY
2006**

DEFENCE
NHS
immigration
crime
education

**FEBRUARY
2012**

ECONOMY
unemployment
immigration
NHS
Crime

Context: the British are among the world's leading pessimists…

Looking ahead 6 months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

% Much Stronger / Somewhat Stronger

Country	%
Total	24%
Brazil	71%
Saudi Arabia	64%
Argentina	52%
India	52%
Mexico	36%
China	35%
Indonesia	28%
Turkey	25%
Canada	18%
Germany	18%
Poland	18%
Spain	18%
United States	17%
Australia	16%
Russia	16%
Italy	14%
Sweden	14%
South Korea	13%
Ireland	11%
South Africa	10%
Great Britain	9%
Hungary	8%
Japan	7%
Belgium	6%
France	4%
Greece	3%

Note that the total global average does not include this month's two ad-hoc countries: Greece and Ireland.

Base: 9,755 online interviews with16/18–64 yr olds August 2011

Source: Ipsos Global @dvisor, August 2011

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Business and entrepreneurship in the UK

- There were an estimated 4.5 million private sector business in the UK at the start of 2011, an increase of 94,000 (2.1%) since the start of 2010. The estimated number of private sector businesses in the UK has increased in each of the last 11 years[1]
  - At the start of 2011, they employed an estimated 23.4 million people, and had an estimated combined annual turnover of £3,100 billion
  - Almost all (99.2%) were small (0 to 49 employees); only 30,000 (0.7%) were medium-sized (50 to 249); and, 6,000 (0.1%) were large (250 or more employees)
  - 62.4% were sole proprietorships, 27.7% companies and 9.8% partnerships
  - 876,000 businesses operate in the construction sector (19.3%); 606,000 (13.3%) in the professional, scientific and technical activites sector; and, 484,000 (10.7%) in the wholesale and retail trade and repair sector
  - There is wide variation in the industrial composition of the business population across the regions, e.g. in London 16.5% are in the professional, scientific and technical activites sector
- According to a 2010 report by Aston University and University of Strathclyde, fewer people have started or invested in new businesses in the UK over the past four years. Similar trends have been seen in other leading G7 economies. However, the number of previously established entrepreneurs has remained largely unchanged in the UK, unlike most other G7 countries where it has declined. This said, fewer people are thinking about starting their own business and the number of actual start-up attempts has declined [2]

Unemployment has risen over recent years – particular challenges in the public sector

- Unemployment has continued to rise since the economic crisis of 2008 hit [1]

  - Although lower than some other parts of Europe

- Public pessimism about unemployment is following suit [1]

- In the last quarter of 2011 the unemployment rate was 8.4% up by 0.1% from the 3 months to Sept 2011 and up 0.5% from a year earlier. The unemployment rate has not been higher since 1995 [2]

- Unemployment is anticipated to grow to 8.7% over the coming year, although it is expected to fall back again to around 6.3% by 2016 [3]

Source: [1] Ipsos MORI Issues Index and ONS Labour Force Survey
[2] ONS, *Labour Market Statistics, March 2012*
[3] Office for Budget Responsibility, *Economic and Fiscal Outlook, March 2012*

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Concern about unemployment vs. unemployment figures

Source: Ipsos MORI Issues Index and ONS Labour force survey

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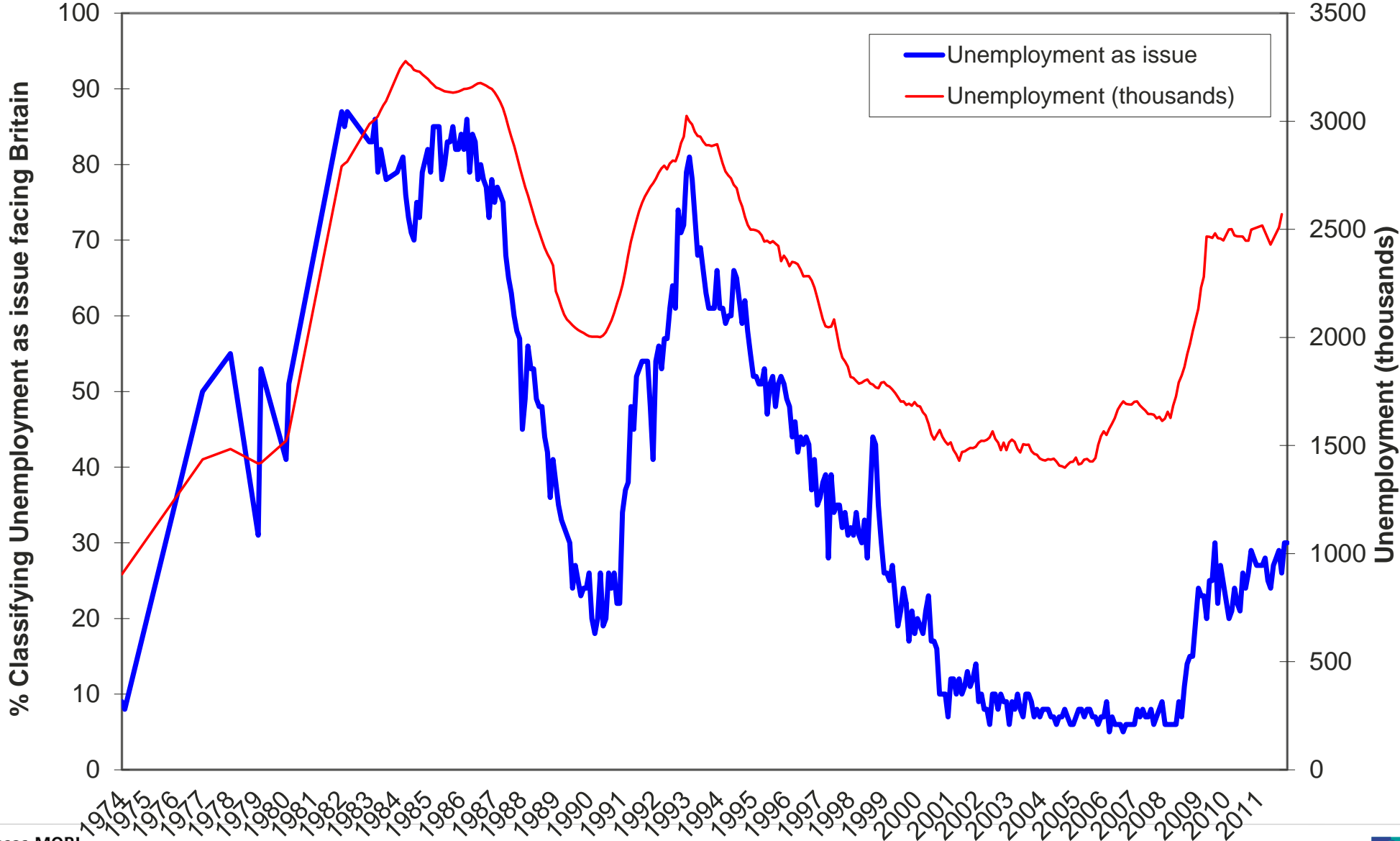
Unemployment across most of Europe
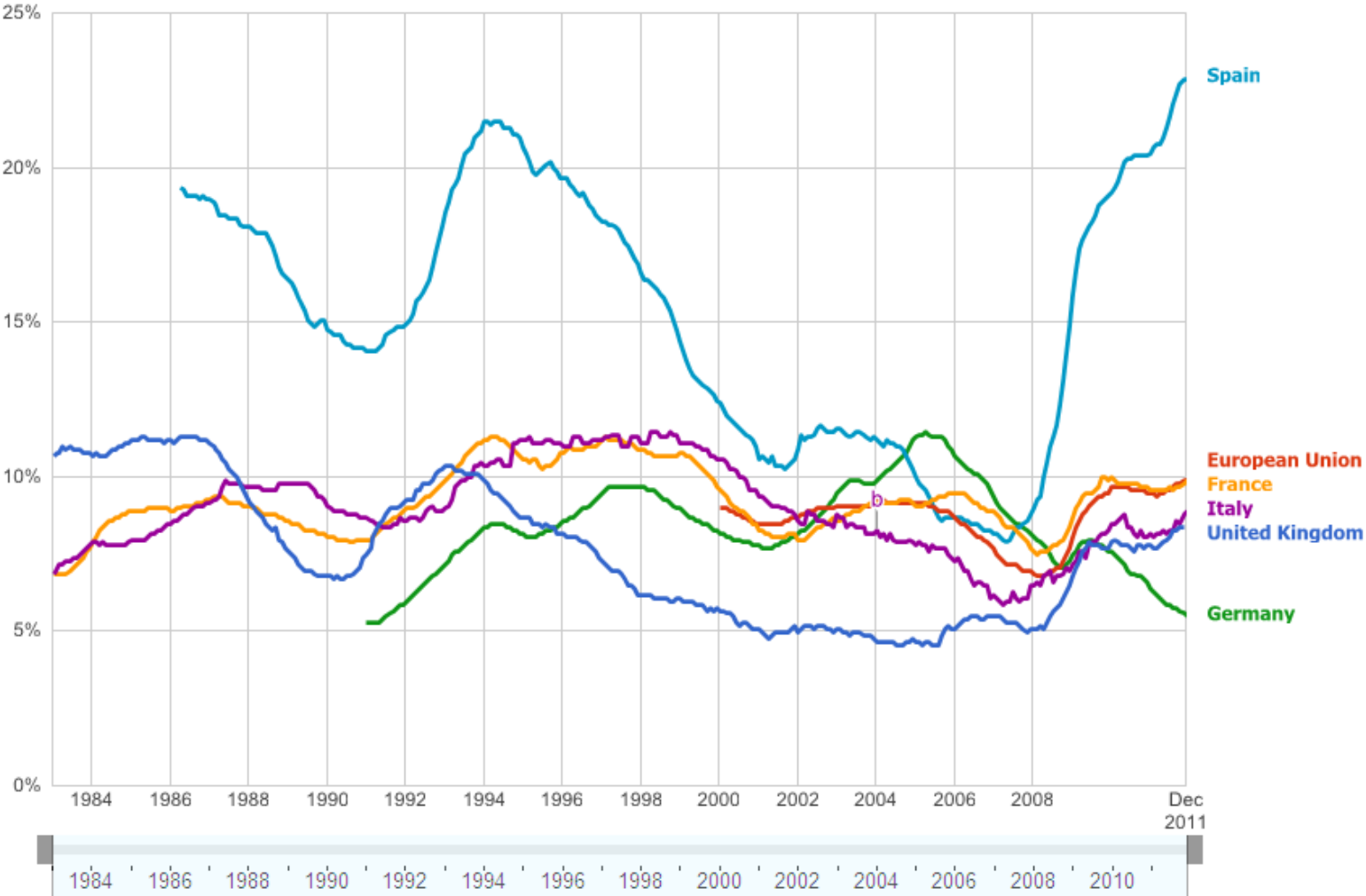
Source: Eurostat, 2012

- Evidence suggests we have lost more than a decade in wage growth (and that even without recession this was already certain). In the best scenario, pay would rise back to its pre-recession peak before the end of the decade [1]

- But, in a more probable alternative, based on the kind of GDP growth we saw in the UK's most recent period of expansion from 2002 to 2008, pay would be no higher in 2020 than it was in 2001 – in other words, nearly 20 years of no wage growth [1]

  - Putting Britain's households on course for a generation-long period of American-style stagnation

- Low-end wages will be affected more, as the minimum wage level has fallen back compared to average pay (unless the minimum wage increases significantly) [2]

- Inflationary pressures have outstripped wage growth in the last year, reducing purchasing power [3]

- According to Mintel, the three most important factors that affected consumer wellbeing in 2011 were rising retail prices (29% ranked it number one), increased costs of utilities (22%) and rising prices of petrol (21%) [4]

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Consumer behaviour is changing

- In 2009 the volume of consumption of goods and services by UK households was more than two-and-a-half times the consumption in 1971 (£810 million compared with £312 million at 2006 prices)

- The volume of spending increased every year over the period, except 1974, 1975, 1980, 1981, 1991 and 2009

- Housing, food, bills and debt repayment form the majority of families' outgoings

- There have been substantial changes over the last 40 years in the way households in the UK allocate expenditure between different goods and services:

  - The strongest growth in volume was communication, which increased by more than 11 times. The communication category includes mobile phone equipment and services, and internet subscription charges

  - Recreation and culture showed the next largest growth in volume expenditure between 1971 and 2009 increasing by over eight times, followed by UK tourist expenditure abroad which increased over five times

  - Alcoholic drinks and tobacco was the only category where the volume of expenditure fell
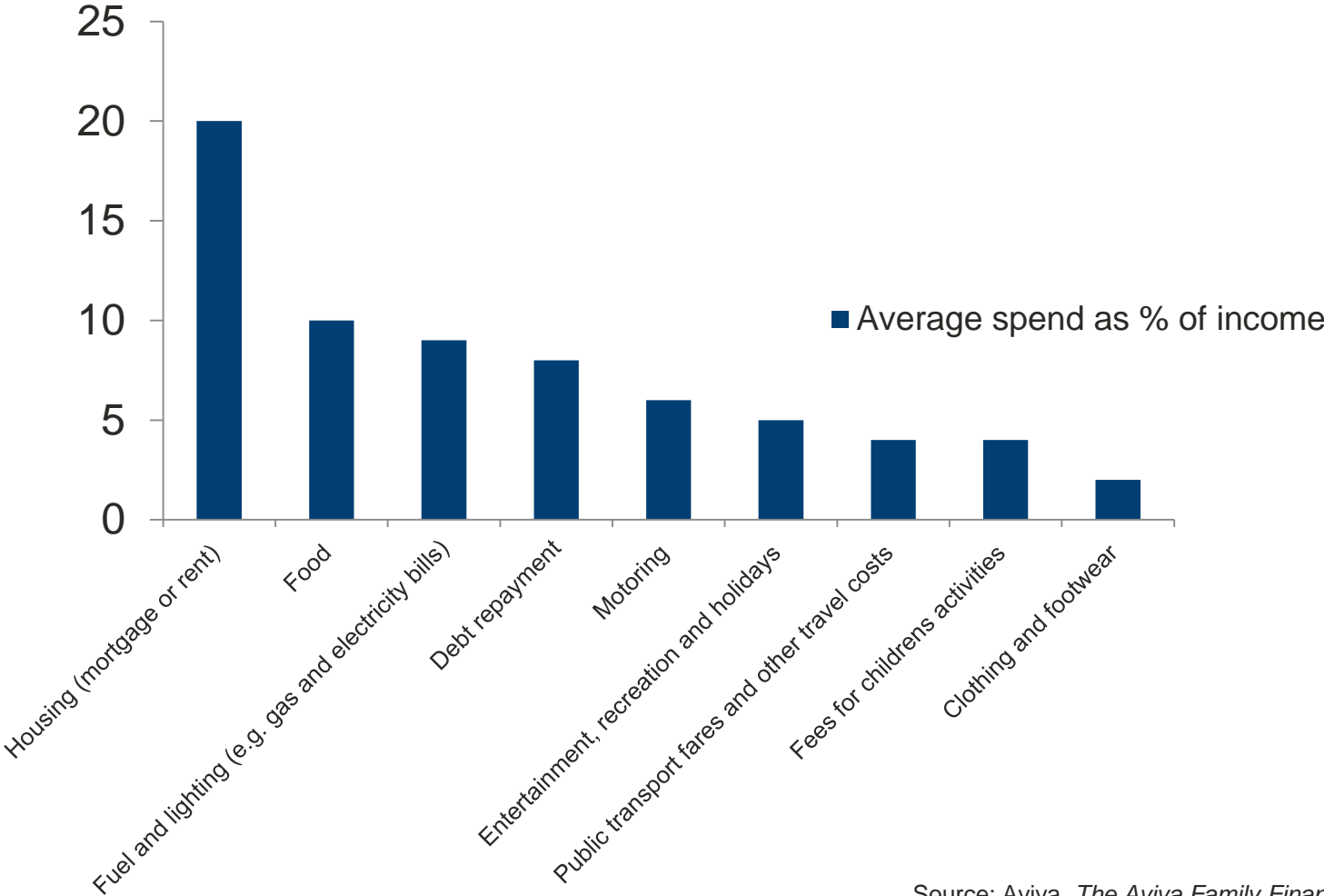
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Index of numbers (1971=100)
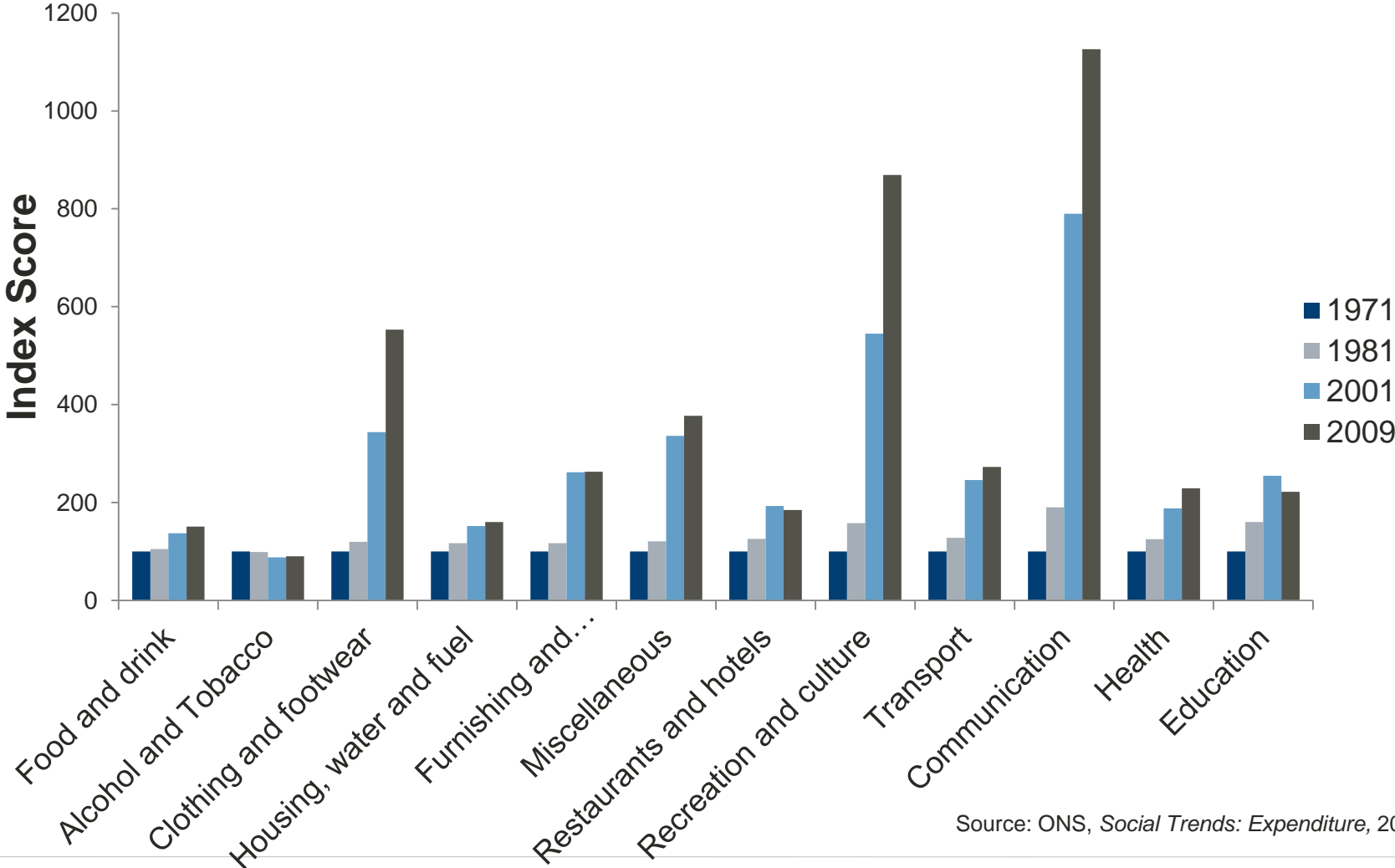
Source: ONS, *Social Trends: Expenditure,* 2009

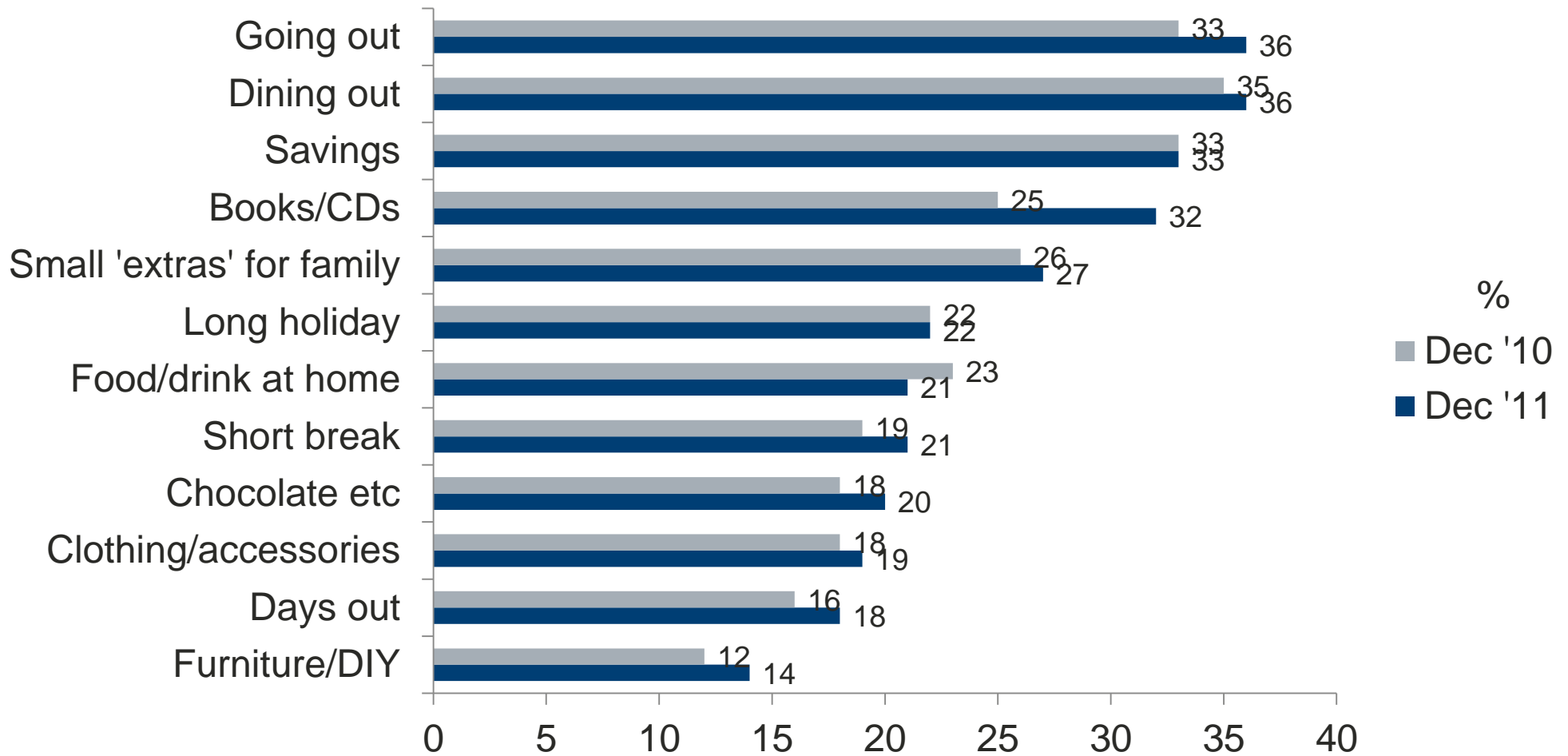# Housing, food, bills and debt repayment form the majority of families' outgoings

Average spend as % of income

Source: Aviva, *The Aviva Family Finances Report,* 2012

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People will generally choose to spend disposable income on going and dining out...

If you have any money left over at the end of the month, what do you spend it on?

Category	Dec '10	Dec '11
Going out	33	36
Dining out	35	36
Savings	33	33
Books/CDs	25	32
Small 'extras' for family	26	27
Long holiday	22	22
Food/drink at home	23	21
Short break	19	21
Chocolate etc	18	20
Clothing/accessories	18	19
Days out	16	18
Furniture/DIY	12	14

%

Source: Mintel, *Christmas shopping 2011 and planning for 2012*, 2012

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What will the consumer of the future look like?

- With the rise of smartphones as the norm for 18-44 year olds (50% own one in the US), consumers will not only expect to be able to access information 24 hours a day but also make requests for it [1]

- Consumers will expect personalised services accessible via their mobile phones, making finding the best deals and the most suitable deals an effortless process [2]

- Anticipated increase in impulsive buying, since people have the means to make purchases at anytime and anywhere, e.g. PayPal reported a 350% increase in people shopping through PayPal Mobile [1]

- The 'shopping basket' of items making up the Consumer Prices Index (CPI) and Retail Prices Index (RPI) continues to be updated to reflect developments in technology and reading[3]

  - In 2012 tablet computers (such as the iPad and Samsung Galaxy Tab) are added for the first time, as are teenage fiction to reflect spending on these items

- Mintel's *Impact of Recession on Media Usage – UK, January 2010* showed how the economic downturn has led to more consumers seeking out free alternatives to paid-for media

Source: [1] Moxie, *2012 Trends Report*, 2012
[2] McCann Eriksson, *Britain 2012 Owner's Workshop*, 2012
[3]http://www.guardian.co.uk/business/2012/mar/13/teenage-fiction-ipads-inflation-basket

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- Consumers have more choice and power than ever before[1]

  - Confident consumers are used to constant innovation, can get bored easily and are less loyal - marketers must stay on their toes to keep their interest

  - They are comfortable with using a wide range of online sources to research their purchases and track down the best deals (e.g. through price comparison sites and online reviews from other users)

  - They then use online communities to spread the word about products and services, good and bad

  - Twitter users are among the keenest on sharing their knowledge about leisure activities, including eating out, days out and music performances

- Even with the economic downturn, consumers are still willing to spend, but with increasing desire for discounts to preserve the feeling of fiscal responsibility [2]

  - A significant majority (65%) will shop around to get the best price when purchasing goods

- Growth in cut-price culture and discount websites [2]

  - The leader, Groupon, is now facing competition from upstart rivals such as the Amazon-backed Living Social, Google Offers and over 500 other new players worldwide

  - Launch of Groupon Now, a mobile-based real-time deals service

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11. Future public service delivery

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- As with wider public, public sector leaders are also pessimistic about future for the economy[1]

  - Funding/grants and budget cuts continue to be viewed as the most important issue facing the sector

- In light of recession, the government is looking to reduce the scale of public sector borrowing [2]

  - October 2010 Spending Review indicated that, on average, central government funding to local authorities will decrease by 26% over the next four years, much of which has been front-loaded

  - Over this period budgets are expected to decrease by around 14% (taking into account projections for council tax)

  - The sector expects more of the same after 2015

- Many of the public still seem to think that greater efficiency in public services can save enough money to help cut government spending (rather than cuts to services)… but does that reflect the reality?[3]
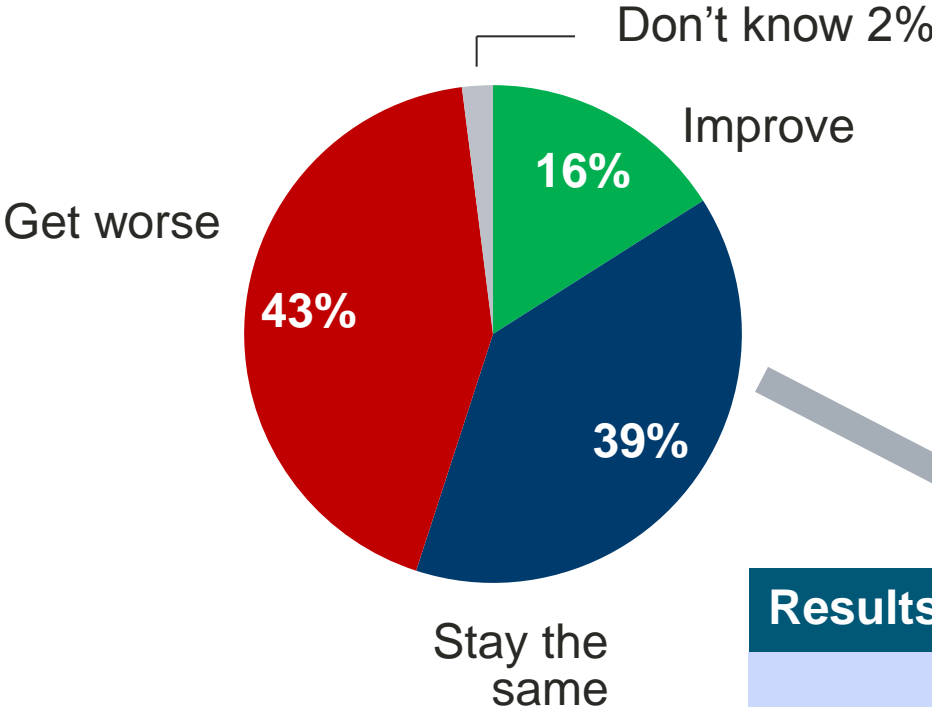
Source: [1]Ipsos MORI, *Public Sector Leaders Survey*, 2011
[2] DCLG, *Local Gov Financial Statistics,* 2011
[3]Ipsos MORI, *various*

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

Don't know 2%

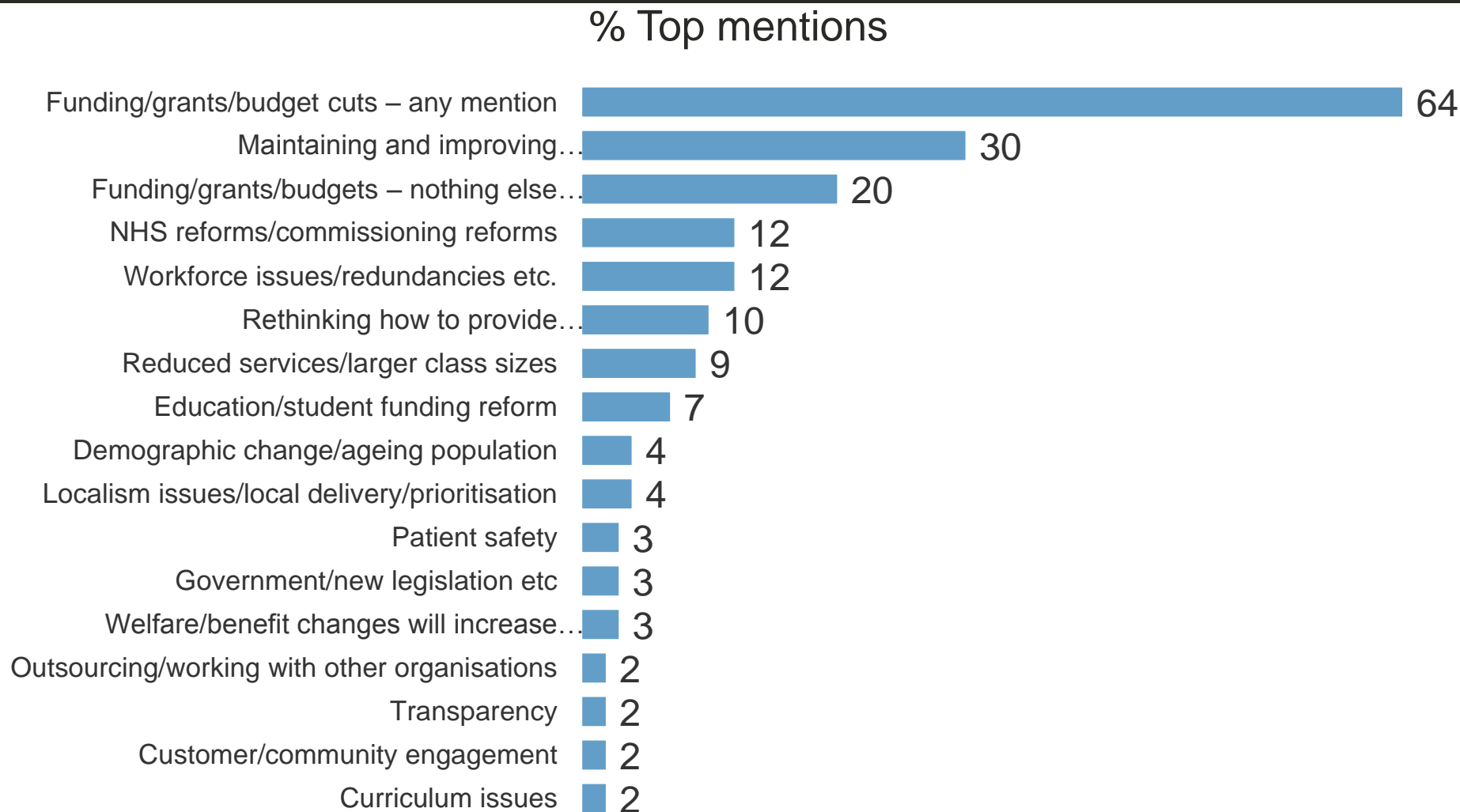Improve

16%

Get worse

43%

39%

Stay the same

Results by sector

	All	Loc. Gov	Cen. Gov	Hlth	Edu	NDPB
Net optimism	-27	-18	-35	-29	-33	-28

Base: 338 Public Sector Leaders, 27 June – 22 July 2011

Source: Ipsos MORI, *Public sector leaders survey*, 2011

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It's likely funding will continue to dominate the debate for some time

## *What would you say is the most important issue facing your sector today?*

% Top mentions

Issue	%
Funding/grants/budget cuts – any mention	64
Maintaining and improving…	30
Funding/grants/budgets – nothing else…	20
NHS reforms/commissioning reforms	12
Workforce issues/redundancies etc.	12
Rethinking how to provide…	10
Reduced services/larger class sizes	9
Education/student funding reform	7
Demographic change/ageing population	4
Localism issues/local delivery/prioritisation	4
Patient safety	3
Government/new legislation etc	3
Welfare/benefit changes will increase…	3
Outsourcing/working with other organisations	2
Transparency	2
Customer/community engagement	2
Curriculum issues	2

Base: 338 Public Sector Leaders, 27 June – 22 July 2011

Source: Ipsos MORI, *Public sector leaders survey*, 2011

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A growing realisation amongst the public that spending cuts are necessary, although views converging again

There is a real need to cut spending on public services in order to pay off the deficit
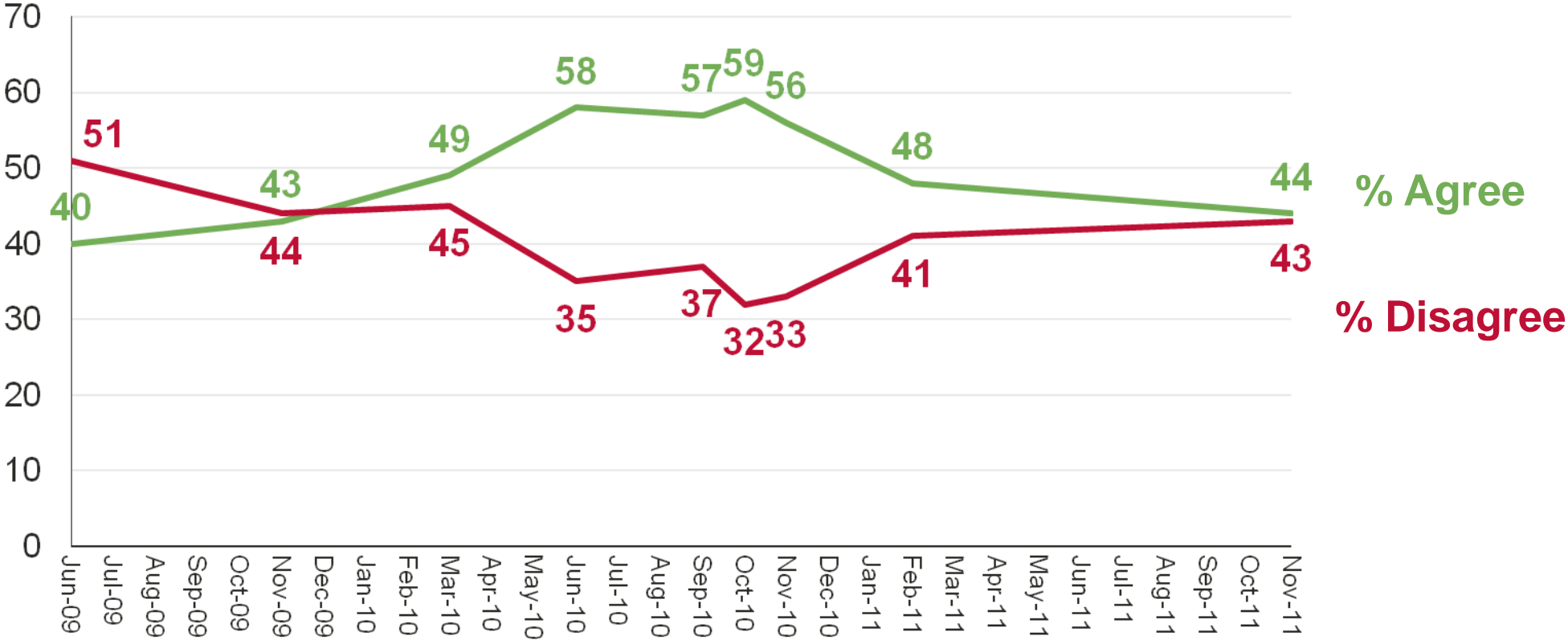
% Agree

% Disagree

Base: c. 1,000 British adults each month

Source: Reuters/ Ipsos MORI, *Political Monitor*, 2011

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To what extent do you agree or disagree with each of the following statements…

■ % Strongly agree ■ % Tend to agree ■ % Tend to disagree ■ % Strongly disagree
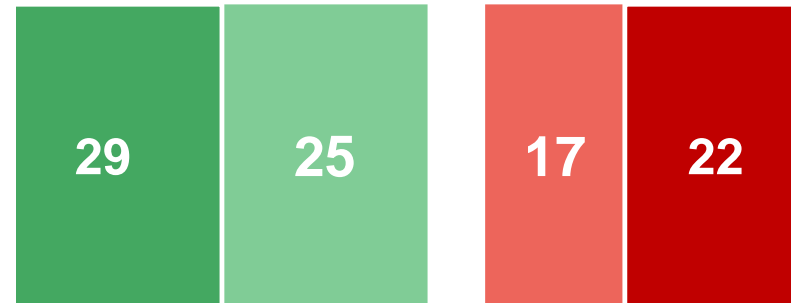
| There is a real need to cut spending on public services in order to pay off the very high national debt we now have | 29 | 25 | 17 | 22 |

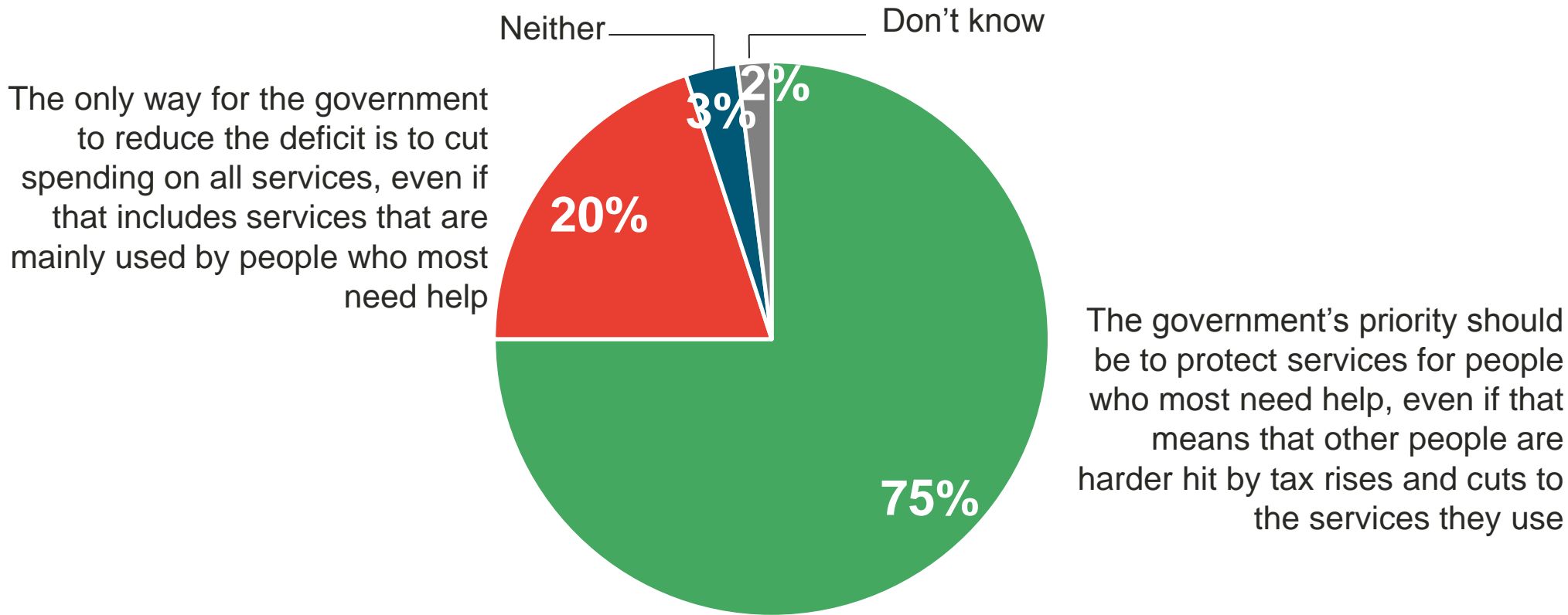| I am personally happy to accept less from public services than I currently get in order to pay off the very high national debt we now have* | 19 | 28 | 19 | 27 |
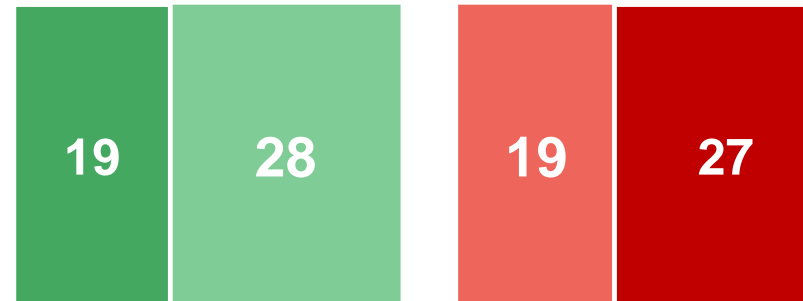
Base: 631 British adults 18+. *Base: 622 British adults 18+
Fieldwork: 18-19 April 2010

Source: Ipsos MORI/Economist, *Issues Index,* 2011

Playing to the British public's sense of fairness, most prioritise the protection of services for those who need them most

107

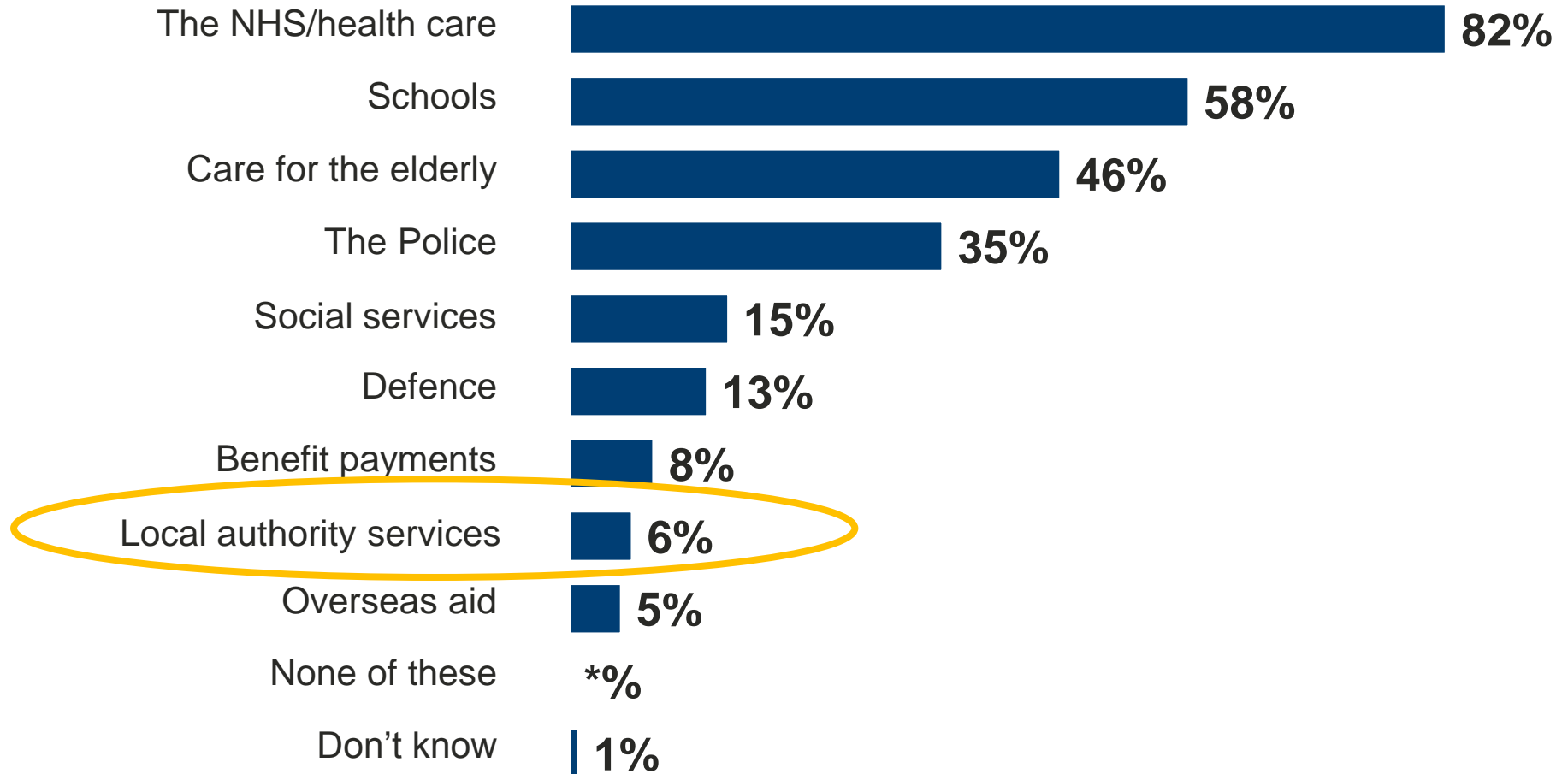*Which of these comes closest to your opinion about how the government goes about reducing the deficit?*

Neither

Don't know

The only way for the government to reduce the deficit is to cut spending on all services, even if that includes services that are mainly used by people who most need help

20%

3%

2%

75%

The government's priority should be to protect services for people who most need help, even if that means that other people are harder hit by tax rises and cuts to the services they use

Base: 504 British adults 18+, 18th-20th June 2010

Source: Ipsos MORI/Reuters, *Political Monitor,* 2010

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Some local authority services are not a priority for protection

*Which TWO or THREE, if any, of the following main areas of public spending do you think **should be protected from any cuts**?*

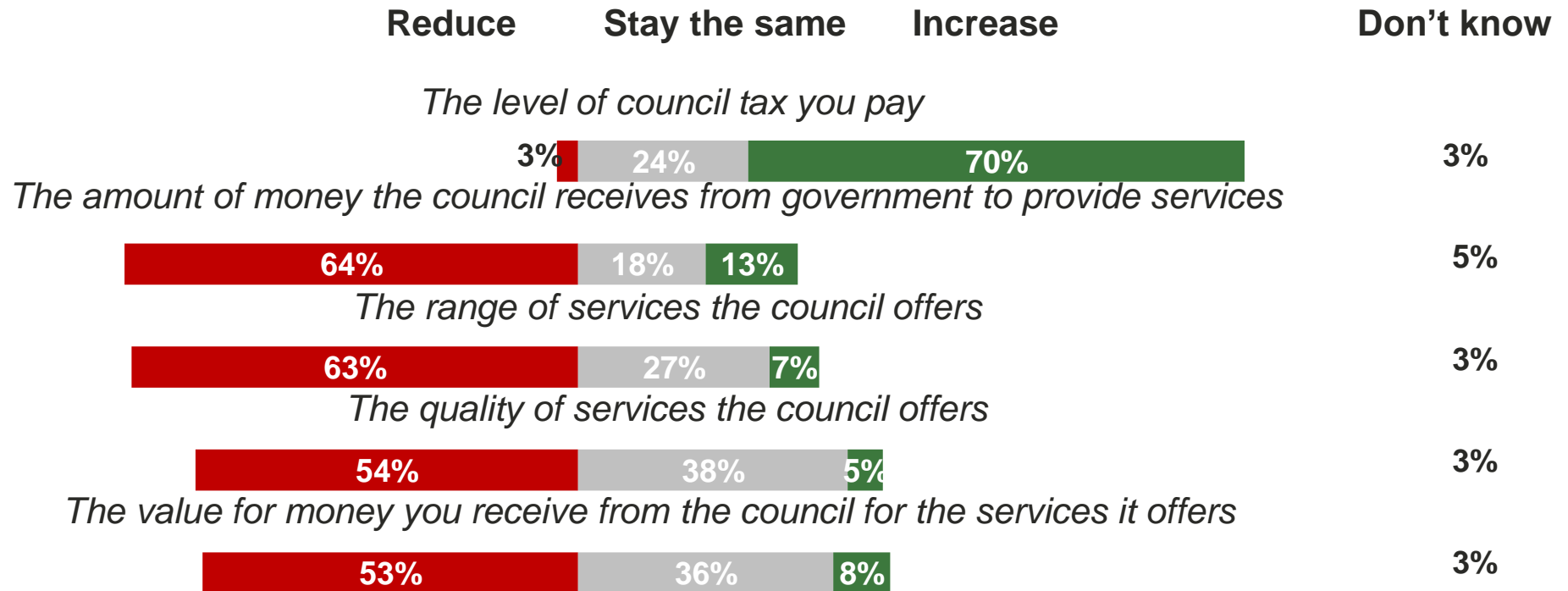| Area	Percentage
The NHS/health care	82%
Schools	58%
Care for the elderly	46%
The Police	35%
Social services	15%
Defence	13%
Benefit payments	8%
Local authority services	6%
Overseas aid	5%
None of these	*%
Don't know	1%

Base: All who think some services should be protected (773), June 2009

Source: Ipsos MORI *Public Spending Index,* 2009

They expect to pay more and get less

Q: Do you think the following will increase, reduce or stay the same in the next financial year (April 2011)?

	Reduce	Stay the same	Increase	Don't know
The level of council tax you pay	3%	24%	70%	3%
The amount of money the council receives from government to provide services	64%	18%	13%	5%
The range of services the council offers	63%	27%	7%	3%
The quality of services the council offers	54%	38%	5%	3%
The value for money you receive from the council for the services it offers	53%	36%	8%	3%

Base: 1,002 GB adults 18+ interviewed by telephone

Source: LG Insight/ Populus, *2011*

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A push towards localism

- There is a push to allow councils greater control over how they spend grants allowing them to focus on local priorities and respond to local needs[1]

- A shift of power from central government to local communities through the Localism Bill[1]

- The paper takes the view that communities are best placed to find the best solutions to local needs and that local public services should be more accountable to local people

"…the days of big government are over; centralisation and top-down control have proved a failure.

We believe that the time has come to disperse power more widely in Britain today; to recognise that we will only make progress if we help people to come together to make life better."

Coalition agreement (May 2010) [2]

Source:[1] DCLG, *A plain English guide to the Local Government Finance Settlement for 2011-12*, 2011
[2] The Coalition: *Our programme for government,* 2010

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Where do the public stand?

- People are in favour of greater local control in principle – but are concerned about fairness

- There is no clear consensus on the role of the state and the balance between "big society" and "big government" – we are split down the middle on the broad principles

- We are also self-contradictory on whether the government should be setting laws to protect us or we should fend for ourselves

- Of course we want flexibility, responsiveness and other desirable features

- But, we are unwilling to countenance risks to the 'safety net'

- Fairness is also key, but it's not straightforward – different meanings
  - Uniform provision vs. Minimum standards vs. Looking after 'deserving' vulnerable

- Large proportions say the public should be more involved in local and national decisions, yet they are far less likely to say they *personally* want more involvement… and the reality is that very few will actively get involved in practice

Source: Ipsos MORI/2020, *Public Services Trust*, 2010

We like the idea of more local control – but are worried about local variation (so-called "postcode lottery")

To what extent do you agree or disagree with each of the following statements:

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

People should have more control over how public services are provided locally

| 54 | 31 | 7 | |

People should have more control over how public services are provided locally, *even though it will mean that the services residents receive will vary between local areas**

| 29 | 34 | 17 | 10 |

Base: 631 British adults 18+.   *Base: 622 British adults 18+.   Fieldwork: 18-19 April 2010

Source: Ipsos MORI/Economist, *Political Monitor,* 2010

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

■ 1 - agree much more with A ■ 2 ■ 3 ■ 4 ■ 5 - agree much more with B

A. Standards of public services should be the same everywhere in Britain

| 43 | 20 | 14 | 12 | 9 |
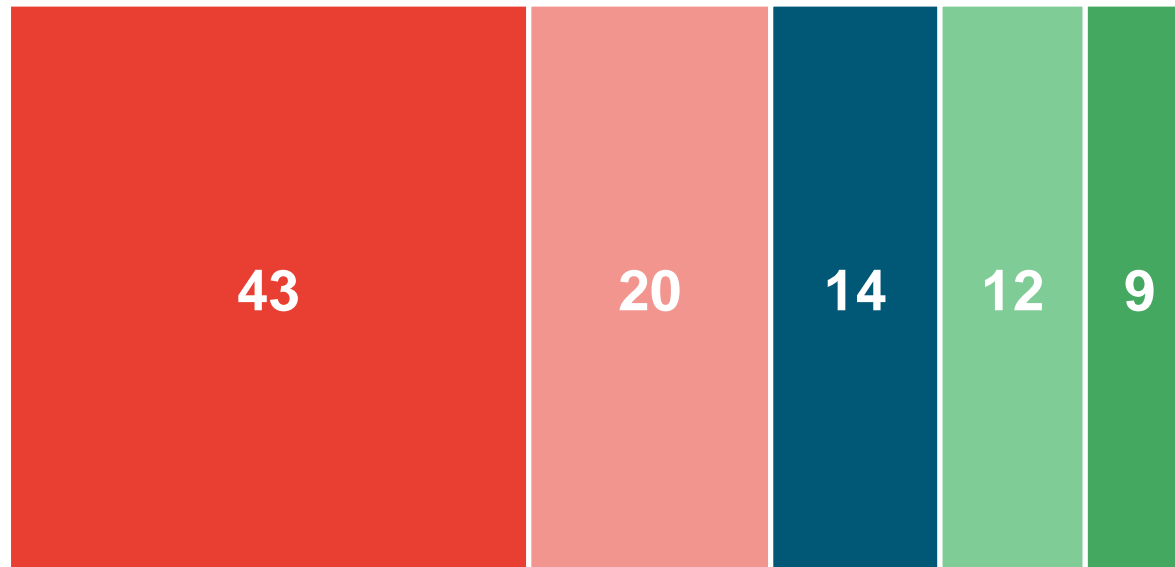
B. The people who live in different parts of Britain should be able to decide for themselves what standard of public services should be provided in their area

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Two in five want to either have more of a say or get actively involved in how decisions about spending cuts are made

Which of these statements comes closest to your attitude towards how decisions about cuts to public services are made?
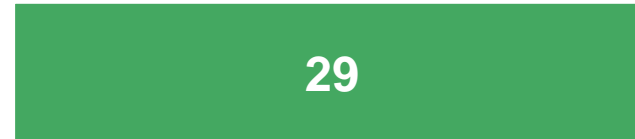
I'm not interested in knowing how decisions about cuts to public services are made, as long as the government consults relevant experts — **22**
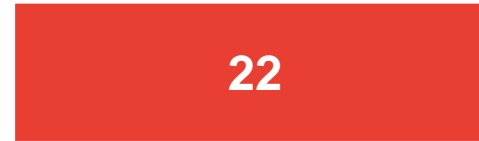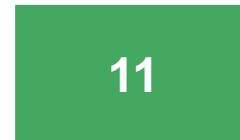
I would like to know how decisions about cuts to public services are made, but I don't want to be involved beyond that — **36**
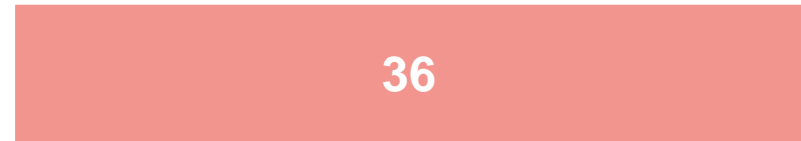
I would like to have more of a say in how decisions about cuts to public services are made — **29**

I would like to become actively involved in how decisions about cuts to public services are made — **11**

Don't know — **2**

Base: 1,002 British adults 18+, 18th-20th June 2010

Source: Ipsos MORI/Reuters *Political Monitor*, 2010

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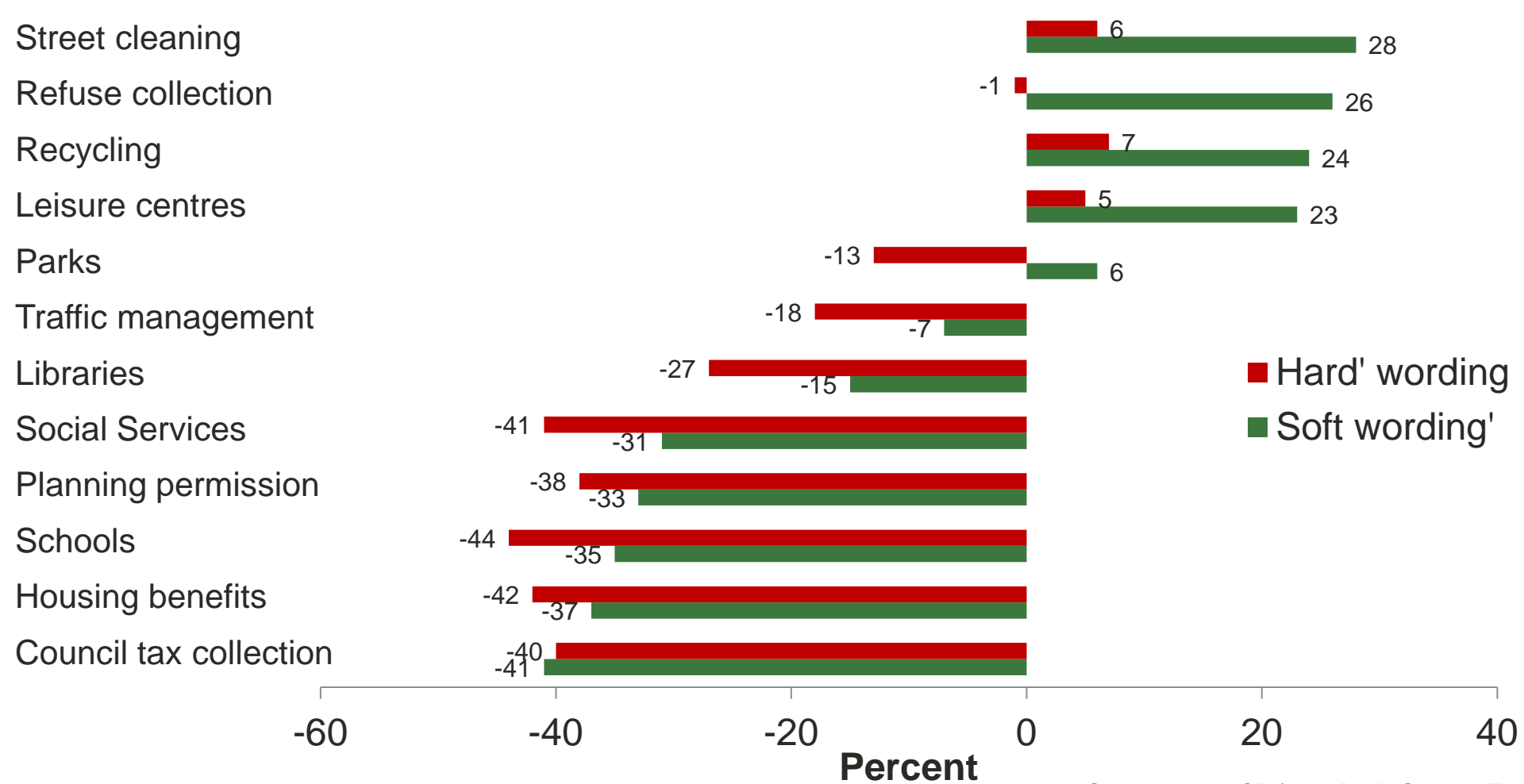Social Research Institute
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- Sharing services to achieve greater efficiency and improvements[1]

- Cutting "waste", particularly back office (e.g. finance, IT, HR, procurement, payroll)[1]

- Improving procurement practices[1]

- Outsourcing[2]

  - There is general support for greater involvement from the voluntary and private sectors – especially in non-core services – but some need to be convinced

- User charging (a more radical and contentious option)[2]

  - Strong opposition to user charging, esp. for core services e.g. GP

  - But, are those who can see advantages – in particular, higher earners and infrequent users of public services

  - Potential to drive service improvements and reduce perceived dependency

  - 'Fairer' for infrequent users?

  - Resistance to user charging <u>on top of</u> existing tax burden – would need to be linked to systemic change

But, not cleat cut – e.g. when it comes to private sector involvement

Which public services should have private sector involvement?

Service	Hard' wording	Soft wording'
Street cleaning	6	28
Refuse collection	-1	26
Recycling	7	24
Leisure centres	5	23
Parks	-13	6
Traffic management	-18	-7
Libraries	-27	-15
Social Services	-41	-31
Planning permission	-38	-33
Schools	-44	-35
Housing benefits	-42	-37
Council tax collection	-40	-41

Percent

Source: Ipsos MORI/2020 *Public Services Trust,* 2010

Q *Thinking about public services, which, if any, of the following would you be prepared to do online?*

Q *And which have you actually done online in the last 6 months?*

■ % Prepared to do   ■ % Have done

	% Prepared to do	% Have done
Find details of local doctors and dentists	81	40
Finding out what public services are…	76	14
Get information about local schools	75	25
Register to vote	72	16
Apply for a driving licence or passport	72	22
Pay your local council tax bill or a parking…	70	24
Make a complaint	67	22
Renew a library book	66	12
Report a crime	51	2
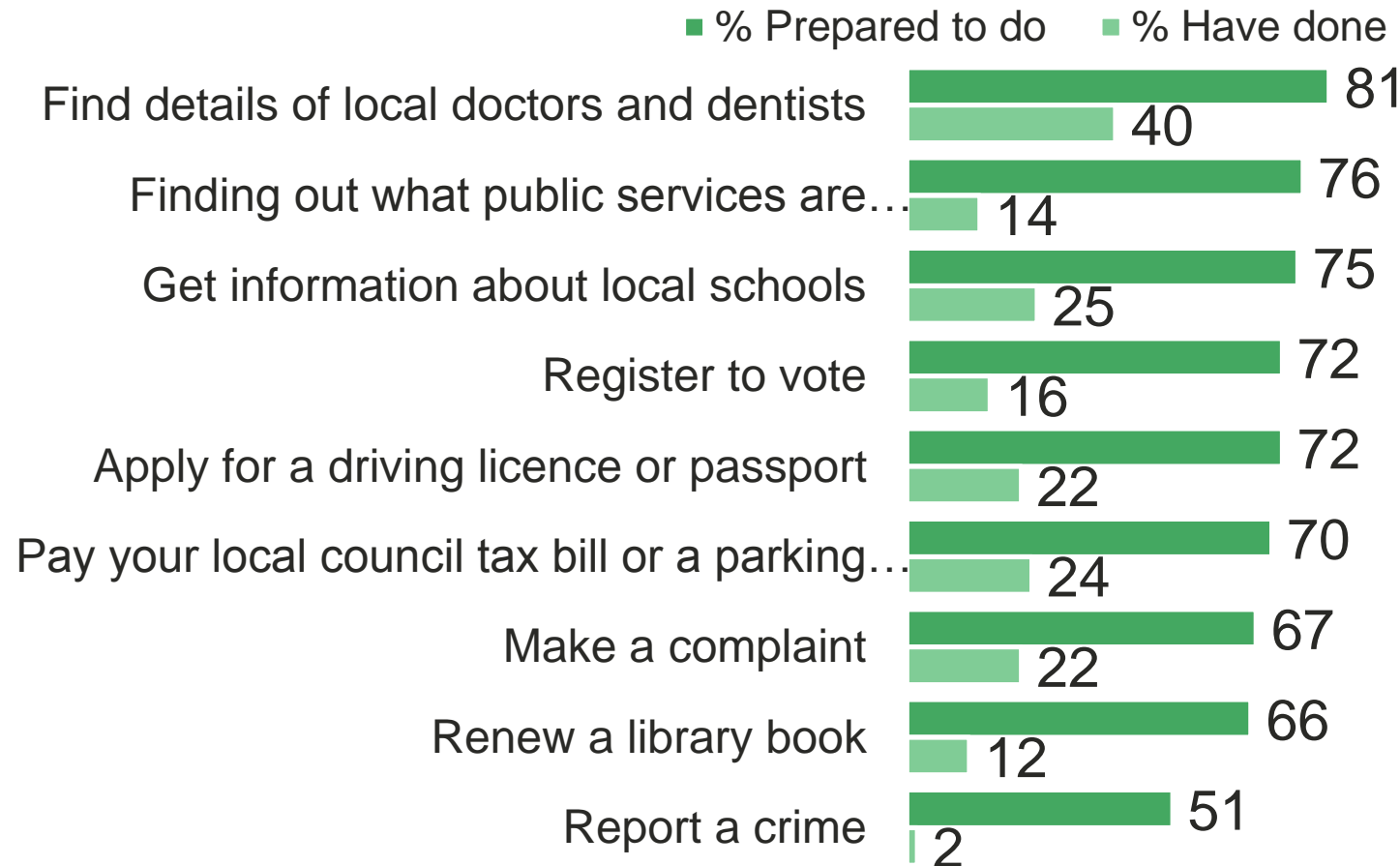
Base: 1,002 adults in Great Britain aged 16+. Fieldwork dates: 13-19 May 2010   Source: Ipsos MORI, 2010

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Most important aspects of service provision that drive overall satisfaction with public services…

Main elements

Drivers

This model explains 67% of the variation in satisfaction

The final outcome
The way the service kept its promises
The way the service handled any problems
→ **Delivery**

Initial wait
How long it takes overall
Number of times had to contact the service
→ **Timeliness**

Accuracy of info
Comprehensiveness of info
Being kept informed about progress
→ **Information**

Competent staff
Being treated fairly
Reliability
→ **Professionalism**

Polite and friendly staff
How sympathetic staff were to your needs
→ **Staff attitude**

30%
24%
18%
16%
12%

Satisfaction with service

Source: Ipsos MORI/ Cabinet Office, *The Key Drivers of Satisfaction with Public Services*, 2004

Looking ahead…

Drawing on this data, this suggests the following:

- Prioritisation and simplifying/ streamlining services are important themes in times ahead
- Working better with partners to provide joined-up, more efficient services – e.g. Total Place
- Focusing on what users want and need from services remains essential
- Can be a virtuous circle – helping to drive efficiencies
- Track customer views => enables you to focus on what makes most difference
- Important to understand where there is most potential for public to accept changes that drive efficiencies
- Both in how services are delivered and how they interact with them

12. Technology

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Technology has been embraced by the majority of the population

- People are becoming more rather than less enamored with new technology [1]

  - 8 in 10 homes now have a computer[1]

- We are rapidly acquiring all sorts of digital devices and increasingly want and are happy with using technology (and online services in particular) for a range of services

- The introduction and development of technology, particularly computers, has dramatically increased flexibility in employment opportunities [2]

  - Many parents are now able to combine working at home with parental responsibilities

  - British workers are increasingly involved in homeworking or teleworking

- In 2009, the internet contributed an estimated £100 billion, or 7.2% of GDP, to the UK economy. This share is larger than that of the country's construction, transportation, or utilities industry [3]

- Internet use also helps to boost innovation and productivity [3]
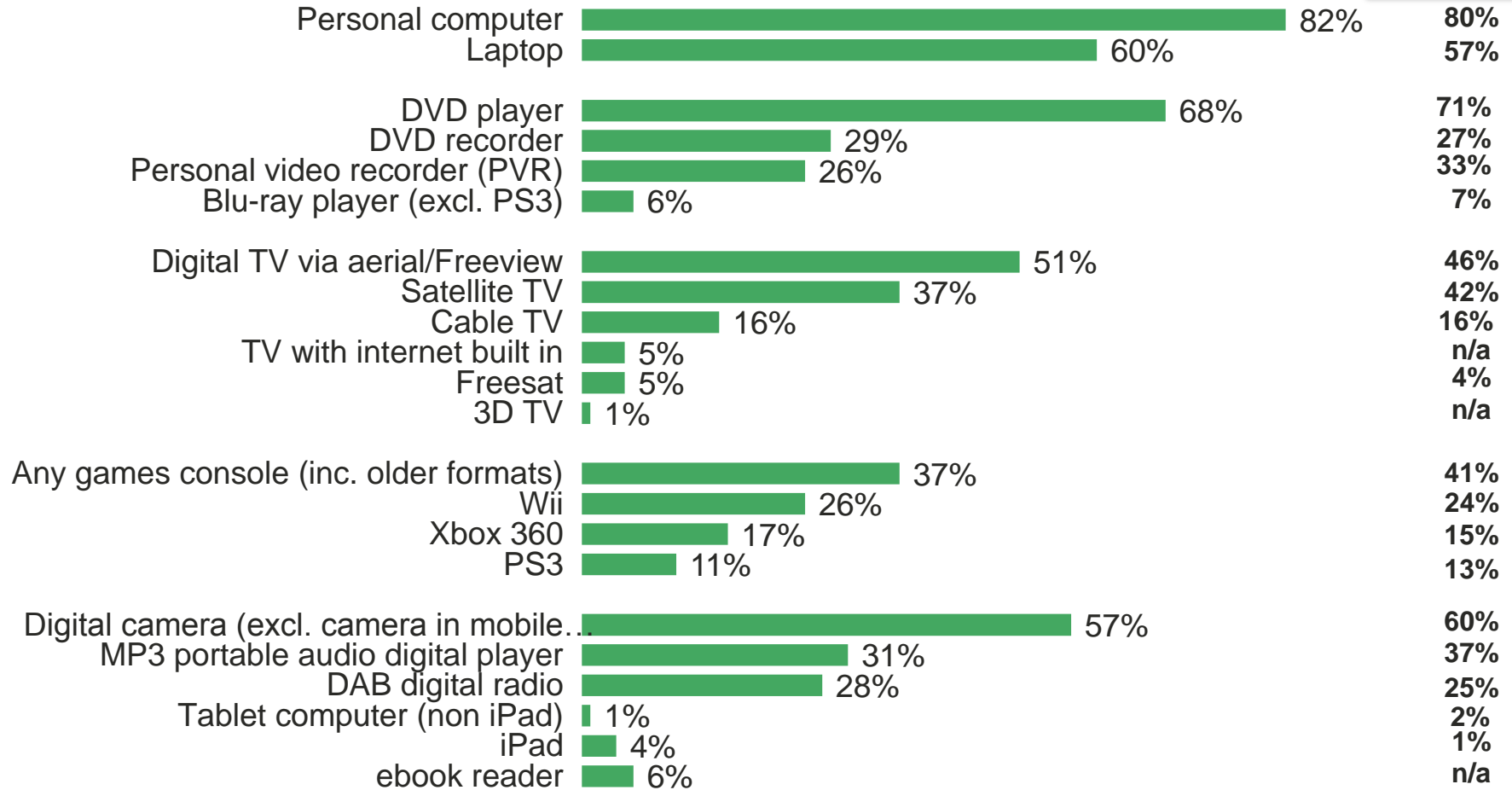
Sources: [1] Ipsos MORI, Tech Tracker, 2011
[2] ONS, *Home-based working using communication technologies, Office for National Statistics • Labour Market Trends,*2005
[3]Boston Consulting Group, *The Connected Kingdom*, 2011

Which of the following do you own/have in your household?

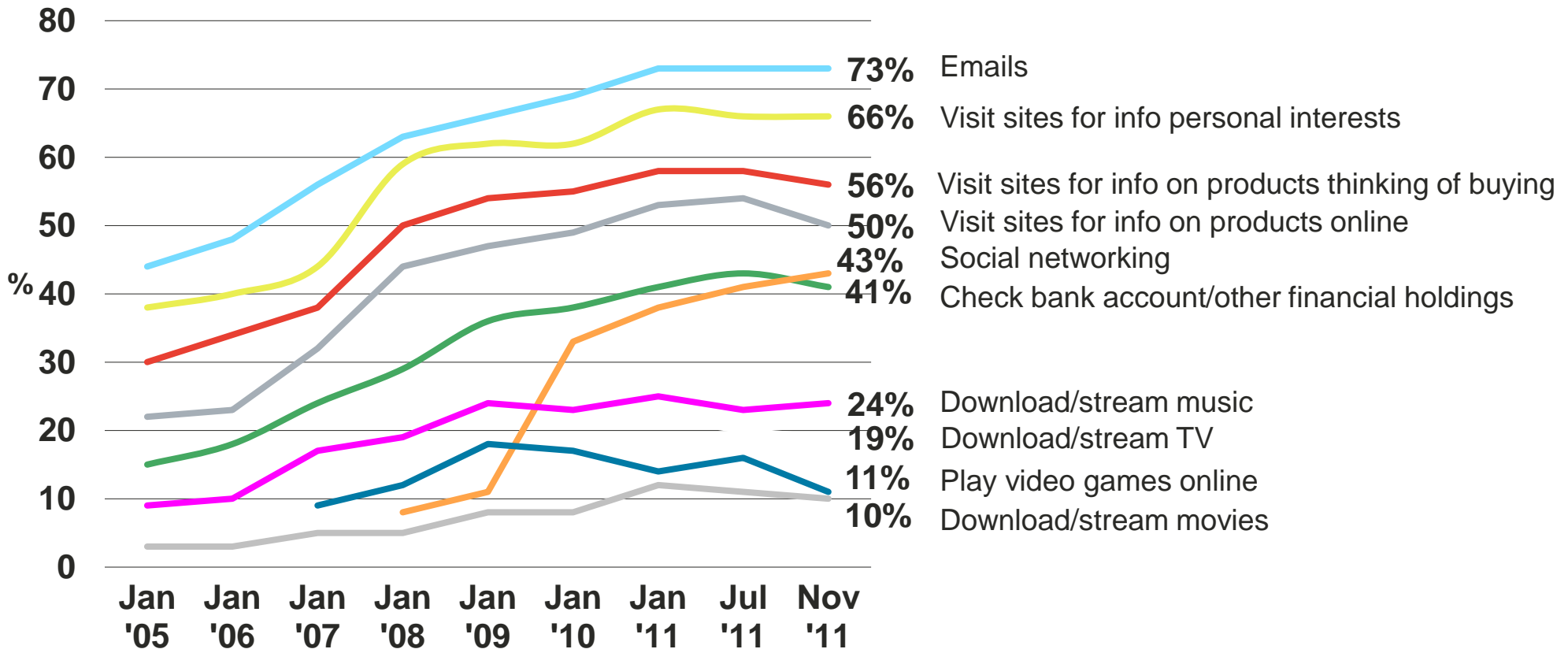|		% as of November 2010
Personal computer	82%	**80%**
Laptop	60%	**57%**
DVD player	68%	**71%**
DVD recorder	29%	**27%**
Personal video recorder (PVR)	26%	**33%**
Blu-ray player (excl. PS3)	6%	**7%**
Digital TV via aerial/Freeview	51%	**46%**
Satellite TV	37%	**42%**
Cable TV	16%	**16%**
TV with internet built in	5%	**n/a**
Freesat	5%	**4%**
3D TV	1%	**n/a**
Any games console (inc. older formats)	37%	**41%**
Wii	26%	**24%**
Xbox 360	17%	**15%**
PS3	11%	**13%**
Digital camera (excl. camera in mobile…	57%	**60%**
MP3 portable audio digital player	31%	**37%**
DAB digital radio	28%	**25%**
Tablet computer (non iPad)	1%	**2%**
iPad	4%	**1%**
ebook reader	6%	**n/a**

Source: Ipsos MORI, *Tech Tracker*, 2011

Use of the internet in the past 3 months

Jan '05	Jan '06	Jan '07	Jan '08	Jan '09	Jan '10	Jan '11	Jul '11	Nov '11	

- **73%** Emails
- **66%** Visit sites for info personal interests
- **56%** Visit sites for info on products thinking of buying
- **50%** Visit sites for info on products online
- **43%** Social networking
- **41%** Check bank account/other financial holdings
- **24%** Download/stream music
- **19%** Download/stream TV
- **11%** Play video games online
- **10%** Download/stream movies

Base: circa 2,000 interviews per wave until January 2010, circa 1,000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI, *Tech Tracker*, 2011

Mobile revolution

There is an increased demand for mobile technology

- Mobile technology uptake has dramatically increased in Britain (and around the world)

- Mobile is one of the fastest growing platforms in the world and is seen as the door to the future – an efficient way to find information (news, local events), keep in touch and save time

- Almost 4 in 10 (38%) now access the internet via their mobile phone, but access via dongle has declined in the last year to 5%

Source: Ipsos MORI, *Tech Tracker*, 2011

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Mobile revolution

•The wording used for measuring 'internet connection by mobile phone' has been updated which means earlier data is not strictly comparable and is therefore not shown
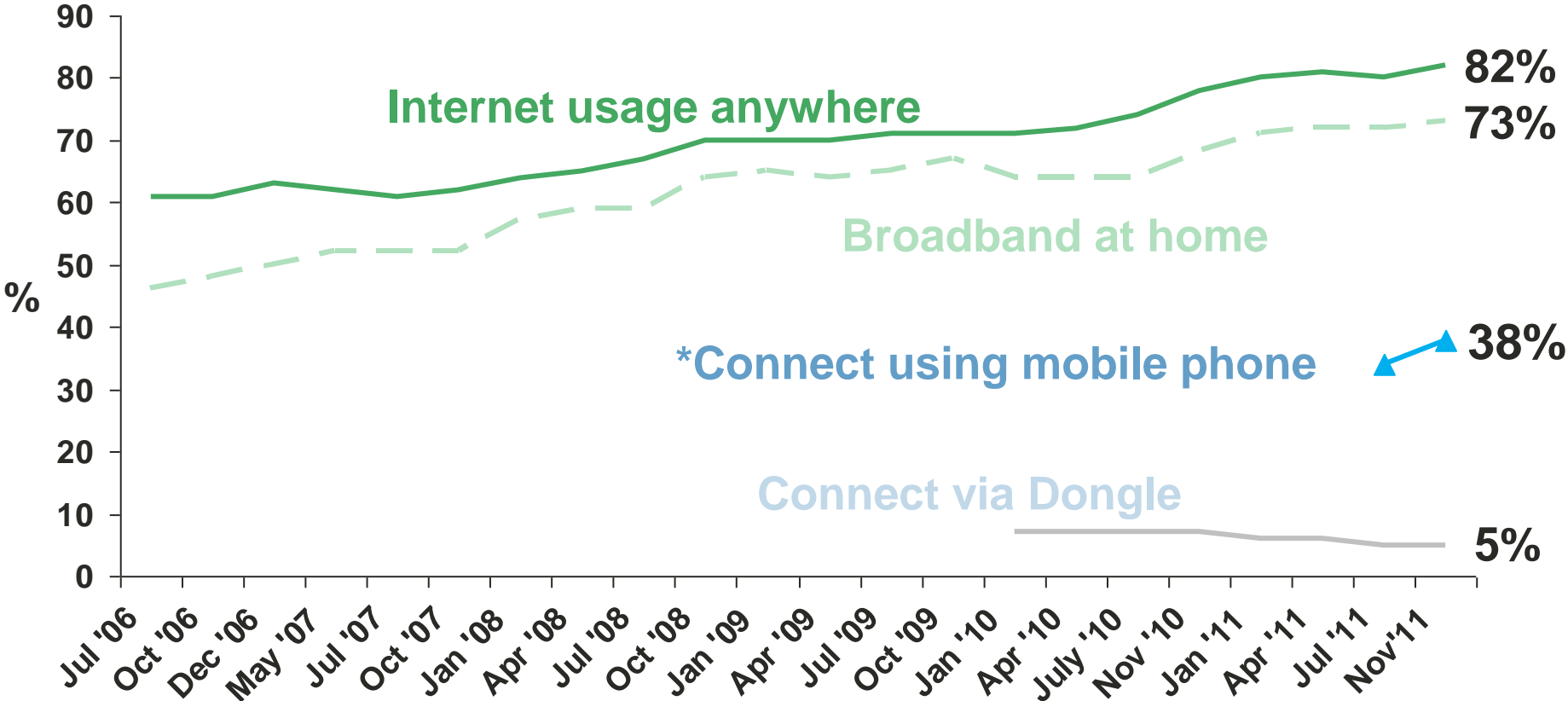
Internet usage anywhere — **82%**

Broadband at home — **73%**

***Connect using mobile phone** — **38%**

Connect via Dongle — **5%**

Base: circa 2,000 interviews per wave until January 2010, circa 1,000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI, *Tech Tracker*, 2011

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Rather than reaching saturation point, a "next generation" of users is emerging

- Relative stability in the number of people with internet access, but recently seen rapid growth of "next generation internet users" [1]

- Defined as someone who accesses the internet on the move from multiple locations and devices and reflects the fact that the internet is increasingly used as more than just a source of information [1]

  - Strongly related to household income rather than simply age (mobile devices are expensive)

- This transformation is linked to important changes in patterns of use and social implications of use (internet more integrated into entertainment and leisure activities)

- Related trends

  - Sales of Smartphones outpacing sales of desktops and laptops[2]

  - Two thirds of Smartphone and tablet owners use them while watching TV[3]

  - Emerging tablet market (5% with iPad or other tablet)[4]

Source: [1] Oxford University, *OxIS*, 2011
[2]*http://www.digitalbuzzblog.com/facebook-statistics-stats-facts-2011*
[3] Ipsos MORI, *Trends and Futures: Digital Insight Bytes*
[4]Ipsos MORI, *Tech Tracker*, 2011

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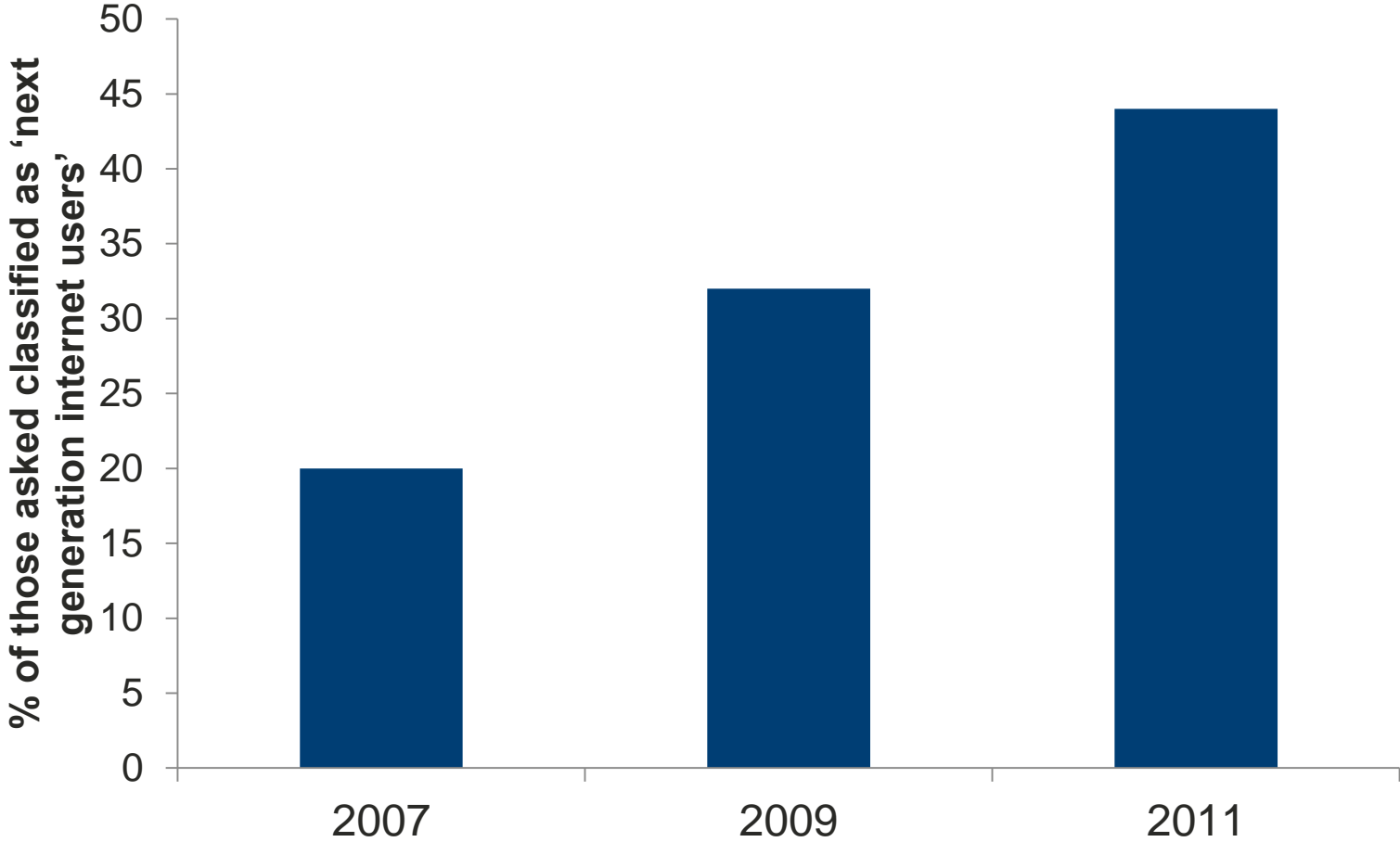
Next Generation Internet Users

Blackberry vs. iPhone vs. Android **ownership**

Smartphone ownership has risen to 39% in the last year with 15% of the adult population owning an iPhone and 13% owning a Blackberry. iPhone ownership is highest amongst younger males at 27% whereas Blackberry is more popular with younger females (28%).


Legend:
- **Any Smartphone**
- **iPhone**
- **Blackberry**
- **Android**

iPhone
Males 15-34 = 27%
Males 35+ =13%
Female 15-34 = 20%
Females 35+ = 8%
Blackberry
Males 15-34 = 20%
Males 35+ =8%
Female 15-34 = 28%
Females 35+ = 9%

Chart values: 39, 15, 13, 9

Y-axis: % — 0, 5, 10, 15, 20, 25, 30, 35, 40, 45
X-axis: Jan '10, Jul '10, Jan '11, Jul' 11, Nov' 11
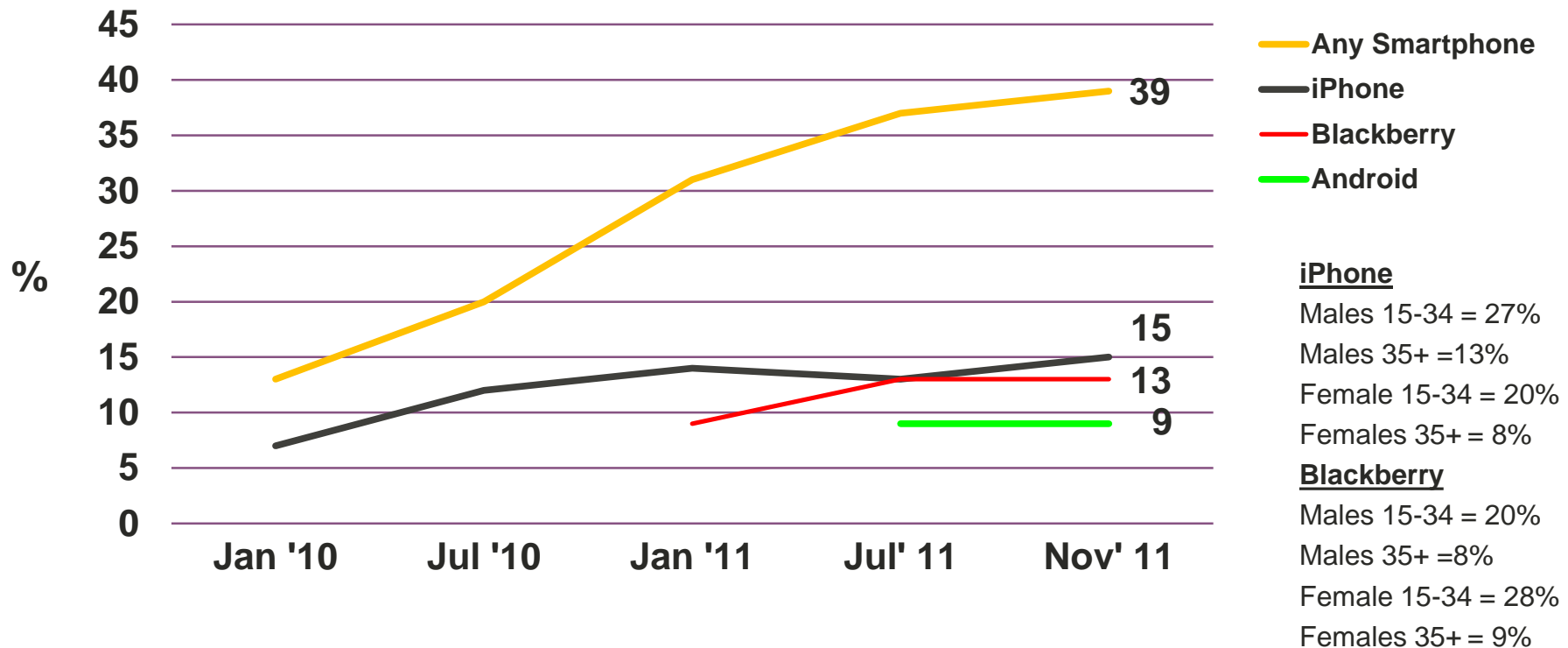
Base: 973 GB adults aged 15+: November 2011

Source: Ipsos MORI, *Tech Tracker*, 2011

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- The internet appears to have low impact on reading than when compared with watching television, for example

- But if asked directly, some users think that the internet has decreased the time they spend reading newspapers (17%) and books (18%)
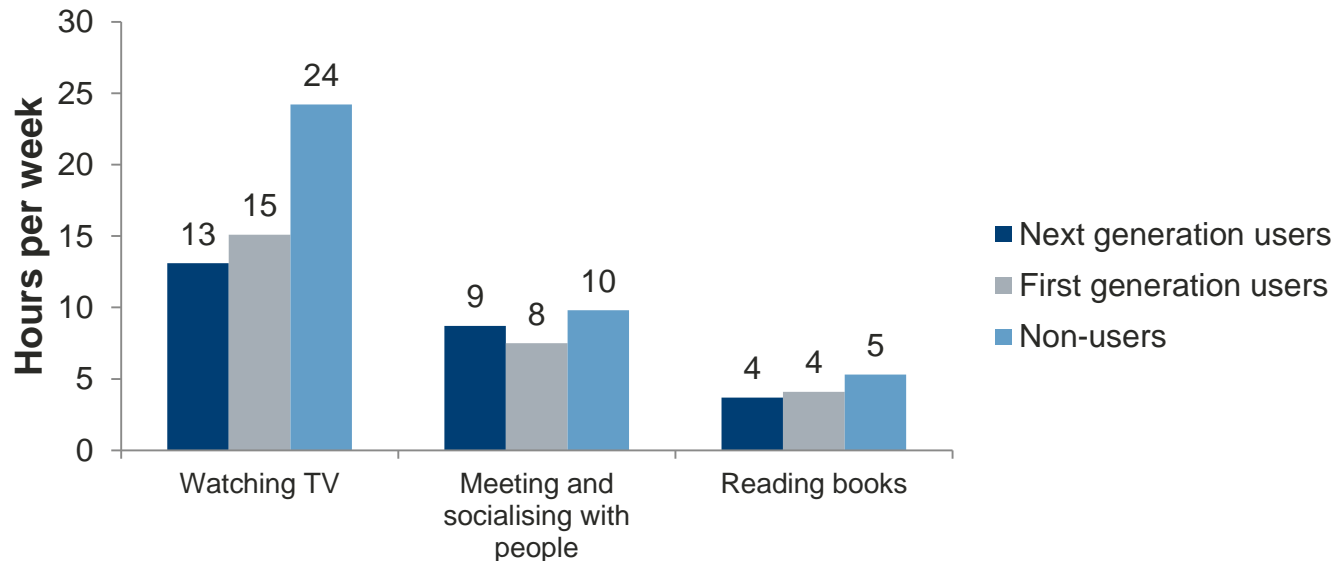
- Reading of online newspapers or news services has been increasing, but appears to now be stabilising (30% 2007; 57% 2009; 55% 2011)

Source: Oxford University, *OxIS*, 2011

The rise of e-publishing

- E-publishing is expanding and looks set to stay [1]

  - One third of UK publishers think that 10% of their total book revenue will be from e-books

  - 81% believe that books will be published in *both* electronic and paper form by 2016

  - 53% say that 10% of their backlists are already digitised and this will accelerate with 71% saying that over half will be digitised by 2016

- People will start to expect a full interactive experience from their e-books. Already publishers (e.g. Ladybird) are introducing audio sections in order to enhance the story [2]

Source: [1] BML, *Publishing 2001: attitudes to technological change,* 2011

[2] Contagious, *Most Contagious 2011,* 2011

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The growth of 'pay walls'

- National newspaper circulation has fallen by 14% over the past five years whilst freesheet distribution has almost doubled - disseminating the popular perception that 'news is free' [1]

- The top three online national newspaper sites each attracted over 10 million unique UK visitors in December 2009 [1]

  - Guardian.co.uk is the largest UK newspaper website with 12.6 million UK unique users in December 2009

- Challenge for industry as media content struggles to retain a sense of value – experimentation with new models

  - Leading to new ways to monetise 'free' online news (in addition to advertising) – including 'freemium' (free basic plus paid premium content) models, subscriptions, micropayments, e-commerce opportunities and delivery via new mobile devices such as the iPad

  - E.g. The Times and Sunday Times recently doubled their charges and Gannett, the US publisher, is introducing 80 pay walls [1]

- Mintel's consumer research shows that over three quarters of readers are currently unwilling to pay anything for online newspapers/magazines; those who are prepared to pay are unwilling to exceed £5 per month for a subscription or 25p for an individual article [2]

Source: [1] http://www.guardian.co.uk/media/2012/feb/23/times-digital-subscriptions-double-price
[2] Mintel, *Paid-For vs Free - Consumer Attitudes to Pricing in Media and Music - UK - April 2010*, 2010

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The end of books as we know them?

- *"Tablets, from the iPad to the Kindle Fire, have brought us closer than we've ever been to the world's libraries. Tablets also enable us to carry around our own library and leaf through it whenever we want…"* [1]

- In stark contrast to the decline in sales of physical books, e-book sales are soaring
  - The total number of books sold in the UK fell by 4.7 million to 25 million over the first eight weeks of 2012 compared to the same period in 2011 [2]
  - E-book sales rose by 623% between January and June last year [3]

- Attributed to the rapidly-growing popularity of Kindles and other e-readers, which display virtual books that are downloaded from the internet
  - Almost 1.4 million e-readers were sold in the UK over Christmas 2011, double the amount sold in 2010 [2]

- But, it is not necessarily seen as a medium that will replace paper publishing according to the Publishers Association
  - 66% think that e-publishing will not displace other forms, but instead will just lead to a growth in the market [3]

Source: [1]Contagious, *Most Contagious,* 2011
[2] Nielsen BookScan, 2012
[3] Publishers Association, 2012

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Social networking

- Online social networks are an increasingly important way in which people engage with each other, keeping our lives constantly updated

  - 43% of the UK population accessed a social networking site (using any device) in the last 12 months, rising to 75% of 15-24 year olds[1]

  - The proportion of internet users in the UK aged 16 and over who had their own social networking site profile doubled between 2007 and 2009, from 22% to 44%[1]

  - One in 13 people on Earth is on Facebook[2]

- Nine out of 10 marketers use social media to promote their business[3]

- Possibly impacting on the way we use the internet[4]

  - For example, OxIS (2011) reports a slight decline in use of search engines and suggests that social networking site users (60% of all internet users) may use search less because they are more likely to go to a social networking site and to pages they received as links from other users

Source: [1]Ipsos MORI Tech Tracker, Nov, 2011
[2]http://www.digitalbuzzblog.com/facebook-statistics-stats-facts-2011
[3]http://www.mediabistro.com/alltwitter/social-networking-2011_b12969
[4]Oxford University, *OxIS*, 2011

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Online communities

- OxIS (2009) indicates that the internet has positively influenced many people's offline relationships with their friends and family

- Use of virtual networks to facilitate real life connections and communication with people whom they would otherwise be incapable of contacting

- More users say the internet has increased their contact with people who share their personal interests than with people who have different interests (22% compared with 10%)

- iCommunities are renegotiating the concept of the "local" and are bound to impact on the way that organisations communicate with the public

Source: Oxford University, *OxIS*, 2011

But, there is still a digital divide

- OxIS suggest 25% not using the internet[1]

- Geographically, access to broadband is patchy across the UK[1]
  - Significant regional differences and the UK's infrastructure lags behind other nations[2]
  - Government has set the target of having the best, superfast broadband network in Europe by 2015 and has committed more than £400 million to supporting investment in broadband infrastructure [3]

- People with higher educational attainment are more likely to have access to the internet[1]

- Dramatic differentials in internet usage by age (which are expected to moderate over time) [1]

- Disability, particularly health related problems, remain a key source of digital exclusion (about double the rate of able bodied people) [1]

- But some non-users cite a lack of interest – i.e. they are exercising a choice and will never want to use technology in this way [1]

- While public access points are not frequent sources of help (with the internet), libraries are the exception, particularly for those on low incomes [1]

  - Those using the internet in libraries tend to have lower incomes

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Older people and those from lower social grades are less likely to access the internet

% Accessing the internet by gender and social grade in 2011

	All	15-24	25-34	35-44	45-54	55-64	65+
Males	84	94	92	93	83	81	58
Males AB	95	100	100	98	100	97	78
Males C1	90	95	99	95	91	89	66
Males C2	78	93	90	83	83	82	45
Males DE	68	92	82	86	55	43	33

	All	15-24	25-34	35-44	45-54	55-64	65+
Females	78	94	94	90	87	77	41
Females AB	90	100	100	98	95	92	62
Females C1	87	100	96	94	95	84	51
Females C2	79	94	95	93	90	77	32
Females DE	56	79	88	73	54	47	24

Internet access

- 80-100%
- 50-79%
- 0-49%

Base: 4,003 GB adults aged 15+: Jan/Apr/July/ November 2011

Source: Ipsos MORI, *Tech Tracker*, 2011

A growth in online government services

- Use of online government services has been increasing, but use of specific services remains low

  - 57% have used at least one or more, but 43% have not used any government service online [1]

- Among users, 40% have done so to get information on a central government service and 38% to get information about local services [1]

- Technology has the potential to provide greater personalisation of services to diverse lifestyles without allowing them to become too fractured [2]

- And there is scope for encouraging service users to use more efficient channels, such as online, to access services in more cost effective ways

- Online services are not necessarily "cold" and may encourage connections, e.g. online communities, and may be one way to personalise services to citizens with diverse lifestyles [2]
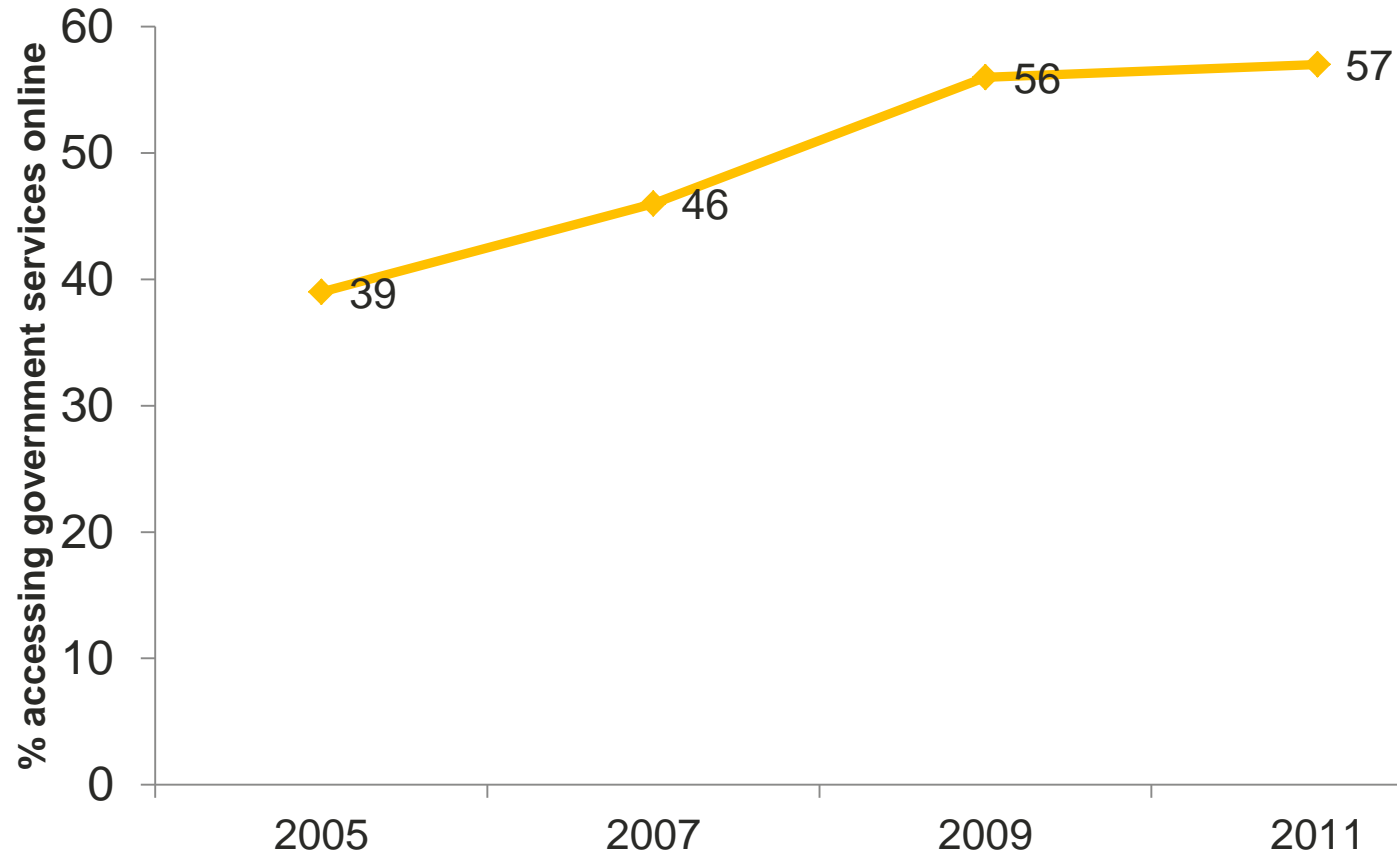
[1] Oxford University, *OxIS*, 2011
[2] BBC/ Ipsos MORI, *How we see public services and what this means for the BBC,* 2009
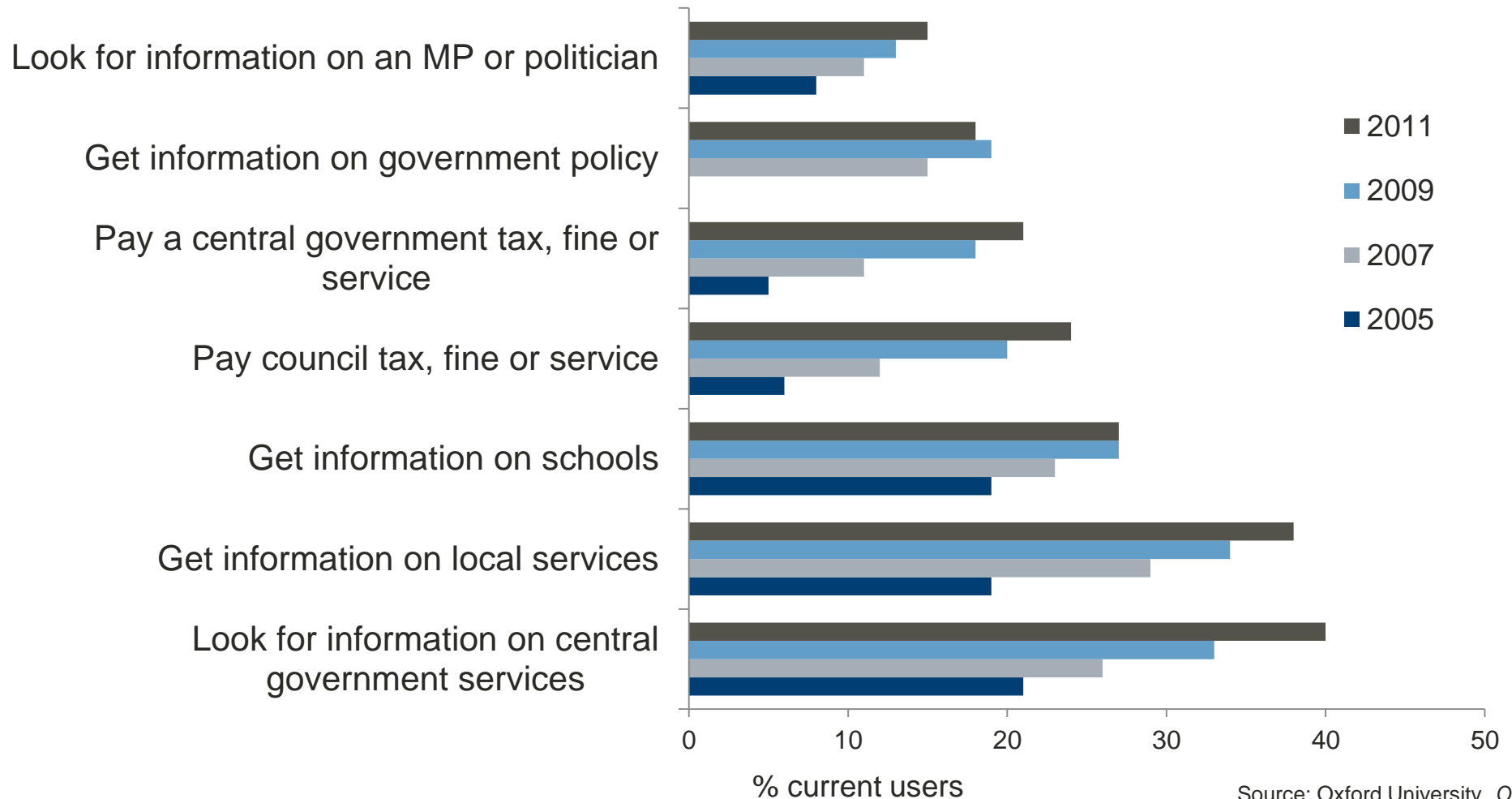
Used one or more government services online

Source: Oxford University, *OxIS*, 2011

People have predominantly been accessing information on central government and local services

Talking now about government information and services, have you done any of the following in the past year [online]?

Look for information on an MP or politician

Get information on government policy

Pay a central government tax, fine or service

Pay council tax, fine or service

Get information on schools

Get information on local services

Look for information on central government services

Legend: 2011, 2009, 2007, 2005

% current users

Source: Oxford University, *OxIS*, 2011

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13. Reading and literacy

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Reading and literacy – young people

- The National Literacy Trust's report, *Literacy: State of the Nation,* found that
  - The number of children achieving the expected levels for reading at age 11 was 84% in 2011
  - This represents and increase since 1999 levels (when the percentage was 78%)
  - 22% of young people aged 8 to 16 say they enjoy reading very much and 28% say they enjoy it quite a lot. 39% say they like it a bit and 10% say they do not enjoy reading at all
  - Technology based materials are the most frequently read - almost two thirds of children and young people read websites every week
  - 73% of parents and carers say their child often reads
  - Parents are the most important reading role models for their children and young people
- The Millennium Cohort Survey has shown that parents who read to their child every day at age 3 are more likely to see them flourishing in a wide range of subjects during their first year in primary school[2]
- In a 2008 study, it was found that 55% of children preferred watching TV to reading; this represented a fall of 7%, from 62% in 2004[3]
- *"Kids' definition of reading is changing in the Digital Age: one in four kids think texting with friends counts as reading"* (Scholastic)[4]
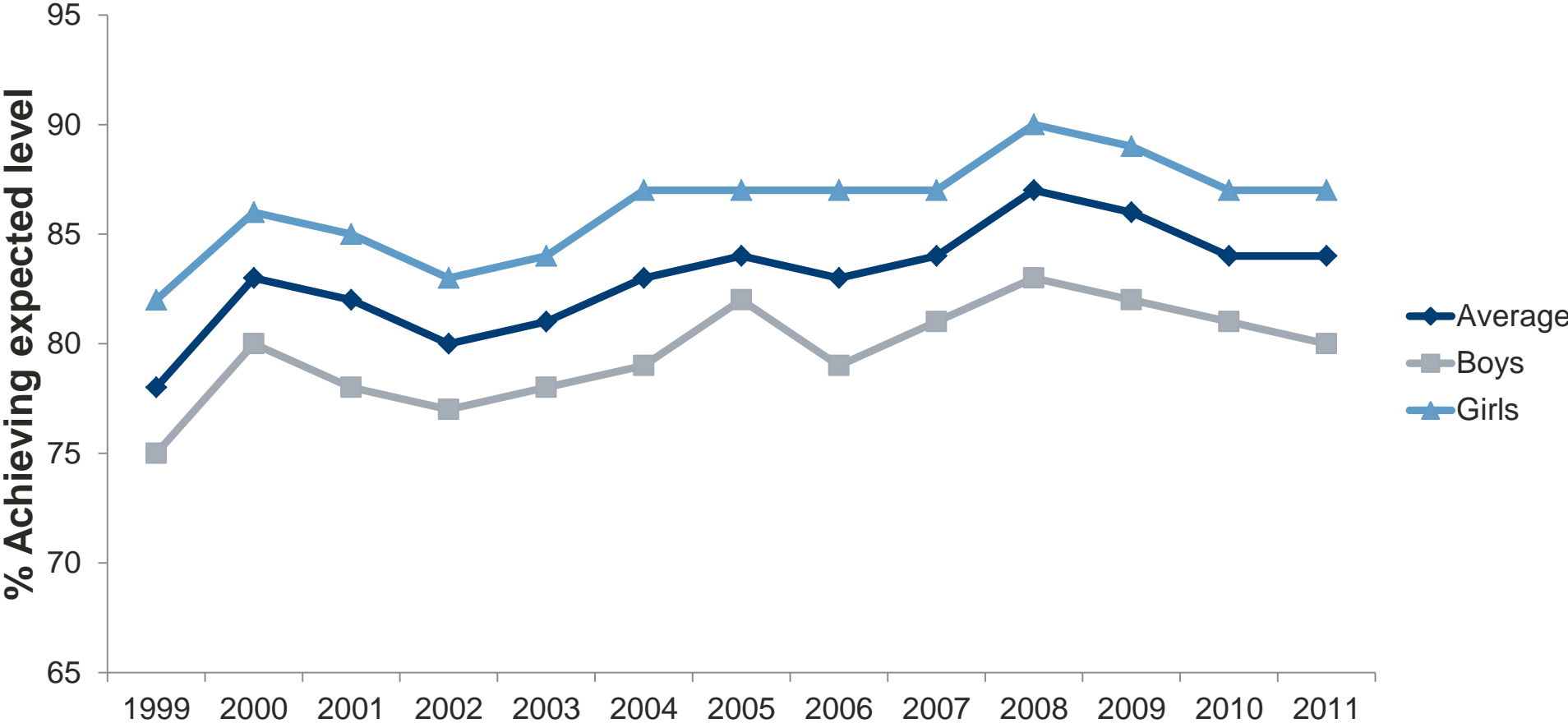
Source: [1] National Literacy Trust, *Literacy: State of the Nation A picture of literacy in the UK today*, 2012
[2]Millenium Cohort Survey, Reading to a child at age 3 pays real dividends two years later, 2010
[3] NFER, *Attitudes to reading at ages 9 and 11,* 2008
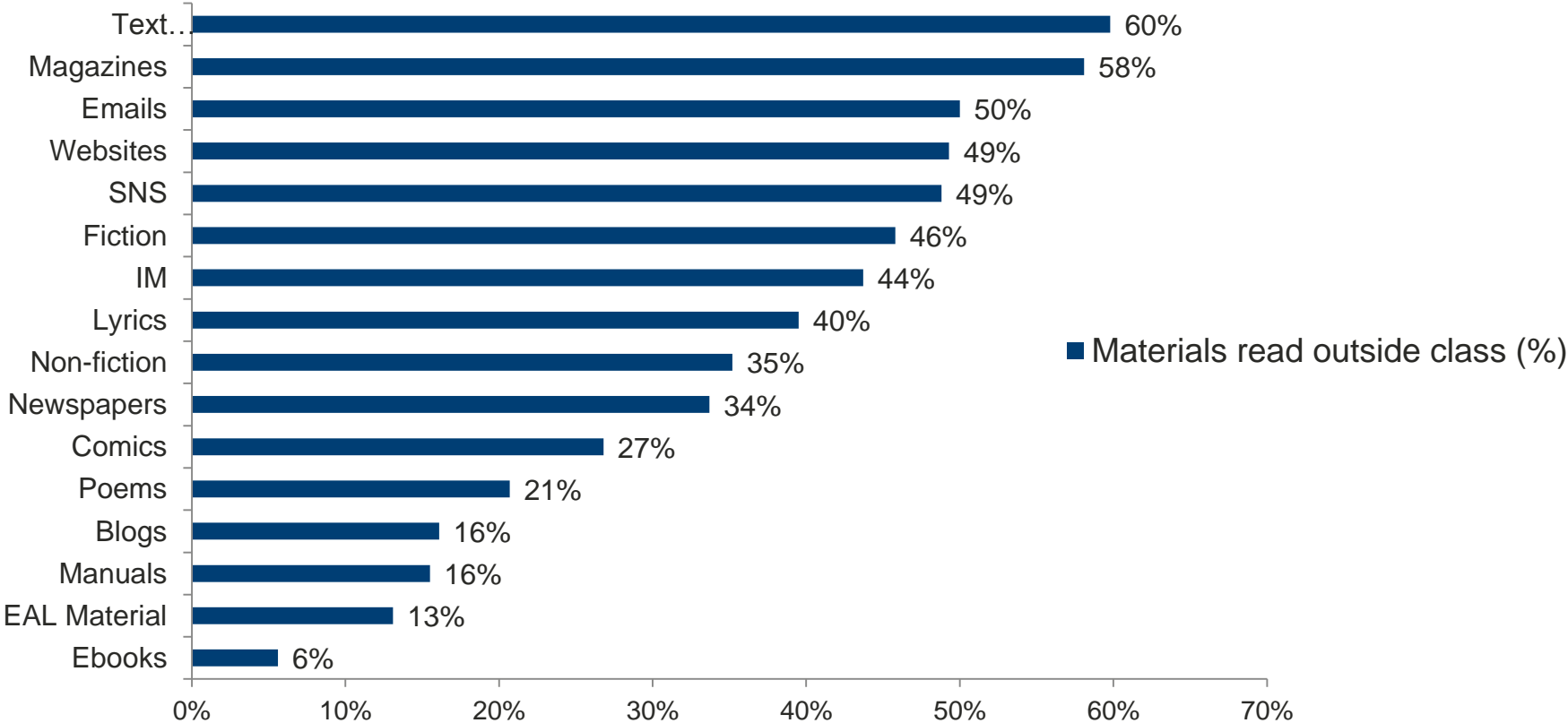[4] Scholaastic/ Harrison Group, *2010 Kids and Families Reading Report,* 2010

Source: National Literary Trust. *Annual Survey into young people's reading,* 2011

Multimedia and online communication form the bulk of what young people are reading outside school nowadays

Which of these do you read outside of class, at least once a month?

Materials read outside class (%)

Material	Percentage
Text…	60%
Magazines	58%
Emails	50%
Websites	49%
SNS	49%
Fiction	46%
IM	44%
Lyrics	40%
Non-fiction	35%
Newspapers	34%
Comics	27%
Poems	21%
Blogs	16%
Manuals	16%
EAL Material	13%
Ebooks	6%

■ Materials read outside class (%)

Source: National Literary Trust. *Annual Survey into young people's reading,* 2011

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The Progress in International Reading Literacy Study surveys 10 year olds (Year 5 in England) every five years. Some notable findings include:

- In 2006 England ranked middle of the other 18 participating OECD countries, but had a relatively wide range of scores between the highest and lowest performing pupils

- An association existed between the number of books in the home and reading attainment and it was found that British homes had one of the highest figures for number of books owned

- In spite of their performance ranking in the middle, the confidence that English children had in their reading abilities was amongst the lowest out of the participating countries (7% expressed low confidence). This figure had risen from 3% in 2001

- Girls outperformed boys in reading attainment in all participating countries

  - In England the gender difference was slightly greater than the international average

  - Children in England had a poorer attitude to reading than those in most other countries and attitudes were poorer than in 2001

- In England children started school at a younger age and more of them began with early literacy skills than the majority of their international peers

Source: (Then) DCSF, *Progress in International Reading Literacy Study,* 2007

E-reading amongst young people

- A US study found indications that technology could actually be a positive motivator to get kids reading
  - 57% of children (age 9-17) say they are interested in reading an e-book
  - A third of children age 9-17 say they would read more books for fun if they had access to e-books on an electronic device
  - Suggests that it may not be an unwillingness to read that is the issue, but the way in which it is done
- But, children still embrace printed books
  - 66% of 9 – 17 year olds agree with the statement *"I'll always want to read books printed on paper even though there are e-books available"*
- Suggests that the development of e-publishing will lead to an increase in the size of the publishing market, rather than a replacement of paper publishing
- Children today have to know how to handle far more information than their parents did when they were children, but is this at the expense of critical thinking?
  - 39% of 9-17 year olds agree with the statement *"the information I find online is always correct"*

Source: Scholastic/ Harrison Group, *2010 Kids and Families Reading Report,* 2010

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Reading and literacy - adults

- When it comes to adults, the National Literacy Trust's *Literacy: State of the Nation,* found that [1]

  - One in six people in the UK struggle with literacy. This means their literacy is below the level expected of an 11 year old

  - An estimated 370,000 parents in London struggle with literacy – this means that around 1 in 5 mums and dads may not be able to read confidently with their children

  - Men and women with poor literacy are least likely to be in full-time employment at the age of 30

- It also stated that there are too many adults who lack basic literacy skills. In 2006 a Government sponsored review into basic skills, the *Leitch Review,* found that more than five million adults lack functional literacy, the level needed to get by in life and at work [1]

- A CBI study of 566 employers shows 42% are not satisfied with the basic use of English by school and college leavers [2]
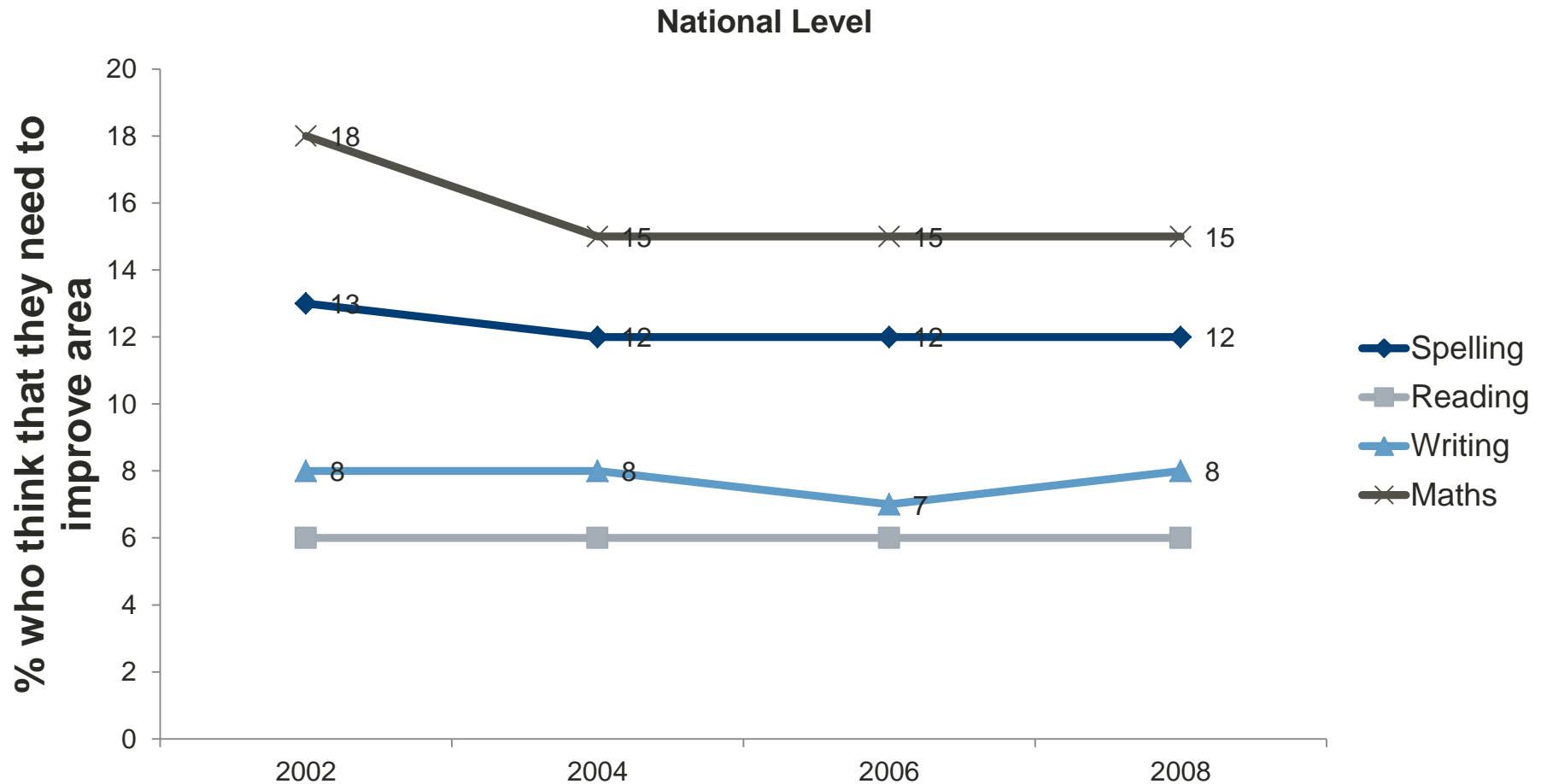
The proportion of people who think that they need to improve their reading has remained fairly constant over the 2000s

Do you think that you need to improve any of the following skills?

National Level

% who think that they need to improve area

- Spelling
- Reading
- Writing
- Maths

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We are, though, supposedly a better educated society today...

- In 2010/11, 59% of children achieved 5 or more GCSEs at grade A* to C or equivalent including English and mathematics GCSEs or iGCSEs, an increase of 5 percentage points from 2009/10[1]

- 80% achieved 5 or more GCSEs at grade A* to C or equivalent, an increase of 4 percentage points from 2009/10[1]

- For students aged 16-18 in schools and colleges entered for all Level 3 qualifications in 2010/11, 94% cent of students achieved passes equivalent in size to at least 2 GCE/Applied GCE A Levels, compared with 95% in 2009/10[2]

- The most popular subjects amongst A Level students were Mathematics, Biology and Psychology[3]

- Girls have tended to lead the pass rates for well over a decade, and also get proportionately more A grades in most subjects[3]

- According to 2010 figures, there were 2.49 million students studying for a higher education qualification in the UK[4]

Source: [1]DfE, *GCSE and Equivalent Results in England, 2010/11 (Revised)*, 2012
[2]DfE, *GCE/Applied GCE A/AS and Equivalent Examination Results in England, 2010/11 (Revised)*, 2012
[3] Joint Council for Qualifications cited in http://www.bbc.co.uk/news/education-11011564, 2012
[4]Universities UK, *Patterns and Trends in UK Higher Education,* 2011

14. Libraries

There is cross-party agreement that other services should be preserved ahead of libraries...

"I have been a local councillor, and if I am faced with a decision of keeping either a local health centre or a library open, it is a no-brainer. People would say to me, *'close the library'*."

Jim Sheridan MP,
Paisley & Renfrewshire North

"...local authorities are facing heavy cuts, and they have to look at what services they can cut that will impact the fewest people. Many things that all three of you have advocated in favour of library services can be delivered through other methods: for example, electronic data do not have to be delivered via a library..."

Louise Mensch MP,
Corby

Source: In Select Committee Transcript on Library Closures, 2011

Falling user numbers

- In 2010/11 39% of adults said they had visited a library in the last 12 months [1]

- Fewer visit libraries each year now than five years ago (down from 48.2% in 2005/6) [1]

  - But, visits have remained stable since 2009/10

- Between 2005/6 and 2010/11 the proportion of people using a library fell in all regions and across all demographic groups [1]

- Non-users get books elsewhere, as other sources seen as more convenient [2]

  - 38.1% of public say they read for pleasure, but had not visited a library in last 12 months

- Possibly some under-reporting of usage as qualitative research for the MLA found those not borrowing books, but using libraries in other ways did not define themselves as users

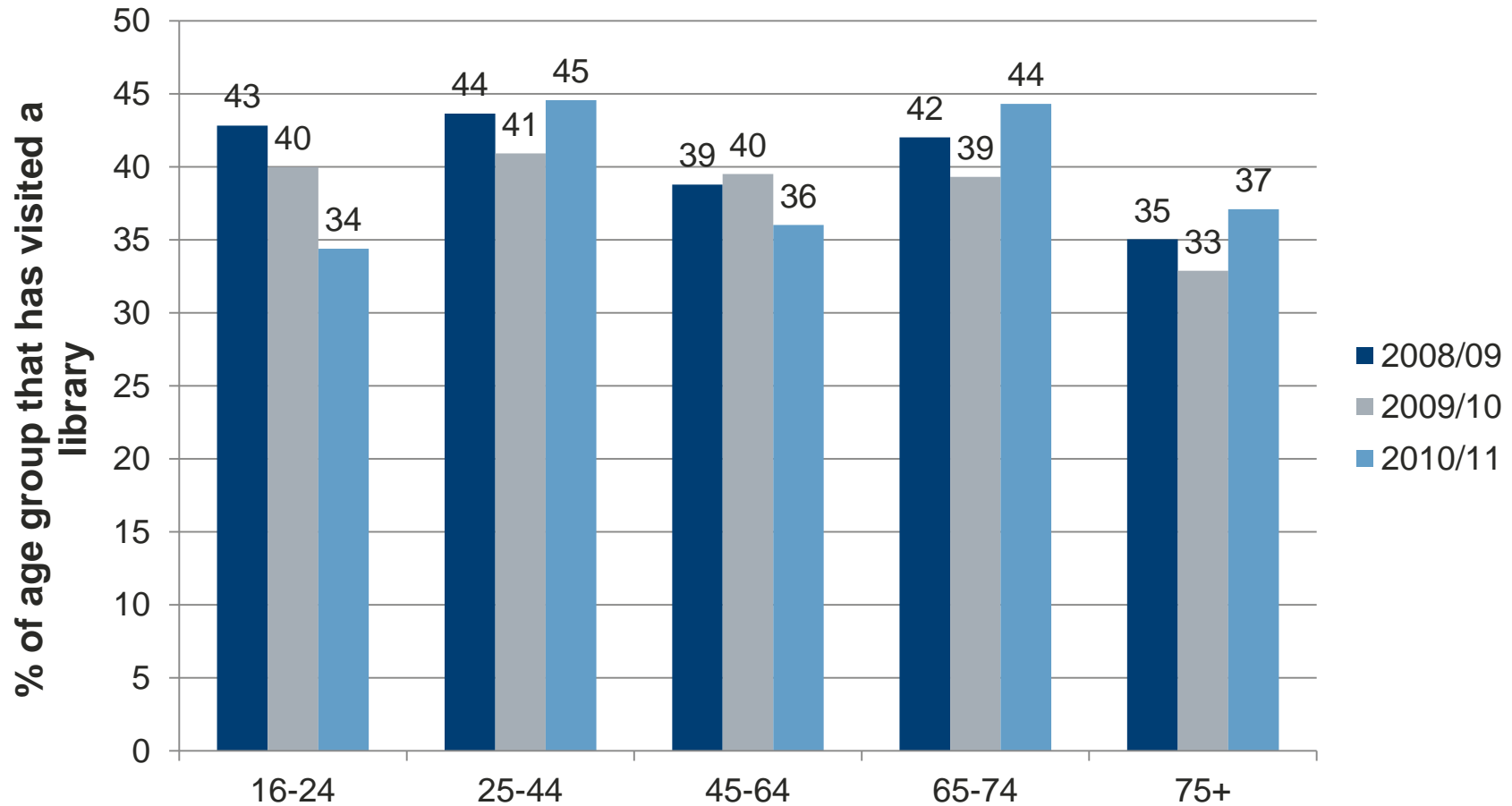Source: [1] DCMS, *Taking Part Survey*, 2011
[2] Ipsos MORI/MLA, *What do the public want from libraries,* 2010

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Are people aware of what libraries offer?

- The public library brand is strong, but awareness of libraries' offer is low[1]:
  - The public thinks libraries are mainly about books and reading as well as access to computers and the internet
  - Lower awareness of support for family history research, second hand books, web-based services and courses and activities on offer
- No magic bullet that will increase library participation, but research suggests there are some potential service improvements involving diversification and innovation, e.g. ebooks, cafés, extended opening hours, more activities for children [1]

Source: [1]Ipsos MORI/MLA, *What do the public want from libraries,* 2010

The profile of library users by age...

% of age group that has visited a library

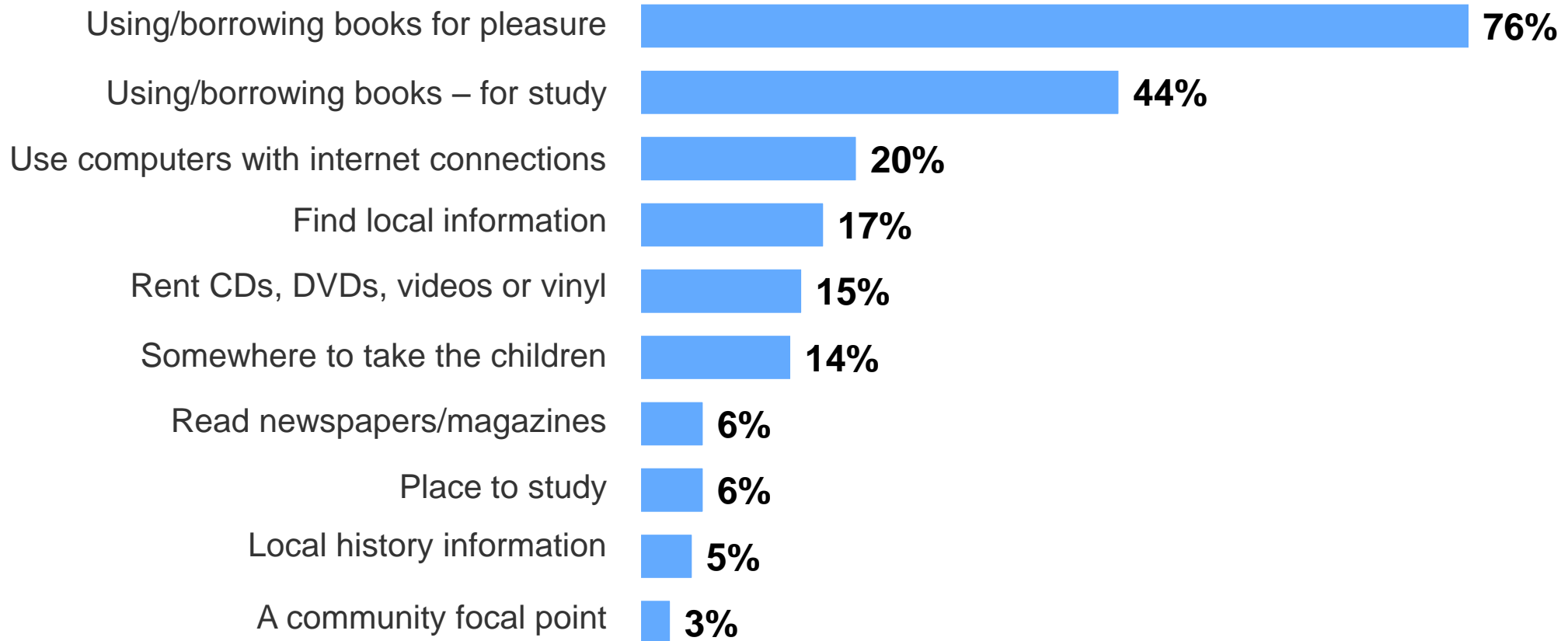| Age group	2008/09	2009/10	2010/11
16-24	43	40	34
25-44	44	41	45
45-64	39	40	36
65-74	42	39	44
75+	35	33	37

DCMS, *Taking Part Survey*, 2011

Books feature heavily in motivations for using libraries

What are your main reasons for using libraries/library services?
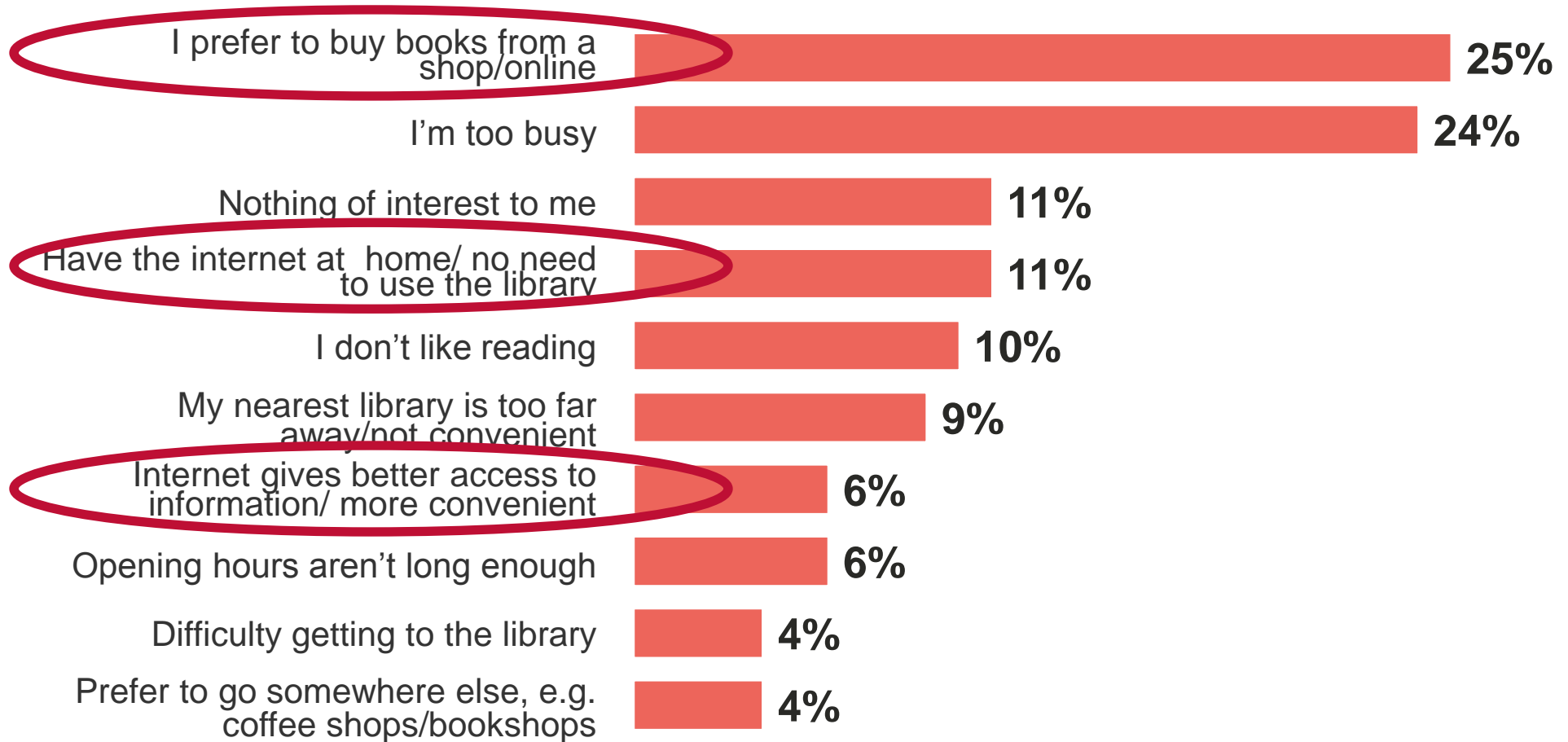
Top 10 mentions

Reason	Percentage
Using/borrowing books for pleasure	76%
Using/borrowing books – for study	44%
Use computers with internet connections	20%
Find local information	17%
Rent CDs, DVDs, videos or vinyl	15%
Somewhere to take the children	14%
Read newspapers/magazines	6%
Place to study	6%
Local history information	5%
A community focal point	3%

Base: People who say they are current library users (631)

Source: Ipsos MORI/MLA, *What do the public want from libraries,* 2010

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But, as evidenced elsewhere, technology is a large driver of reasons for not visiting…

What are your main reasons, if any, for not using public libraries (nowadays)?

Top 10 mentions

Reason	Percentage
I prefer to buy books from a shop/online	25%
I'm too busy	24%
Nothing of interest to me	11%
Have the internet at home/ no need to use the library	11%
I don't like reading	10%
My nearest library is too far away/not convenient	9%
Internet gives better access to information/ more convenient	6%
Opening hours aren't long enough	6%
Difficulty getting to the library	4%
Prefer to go somewhere else, e.g. coffee shops/bookshops	4%

Base: People who say they used to be library users or who have never been (470)

Source: Ipsos MORI/MLA, *What do the public want from libraries,* 2010

Public attachment to libraries differs

- Research for the MLA shows that libraries are valued for a variety of reasons and mean different things to different people
  - A cheaper option, offering unique range of services
  - "Me time", a legitimate space to go somewhere quiet and be alone
    - Particularly important for 14-35 year olds
    - 18-24 year olds more likely to value libraries for quiet study space
  - A family day out, somewhere reliable and convenient
    - For those with young families, taking children is important for their education
  - A love of reading
    - Unemployed people are more likely to borrow books for pleasure
  - Social contact/ somewhere to go
    - Particularly for older people/ more vulnerable groups

Source: Ipsos MORI/MLA, *What do the public want from libraries,* 2010

But, also a wider public attachment to libraries

How important or unimportant do you think public libraries are as a service to the community?

Legend:
- Essential
- Very important
- Fairly important
- Not very important
- Not important at all

Categories: Current users, Lapsed users, Non-users

X-axis: 0%, 20%, 40%, 60%, 80%, 100%
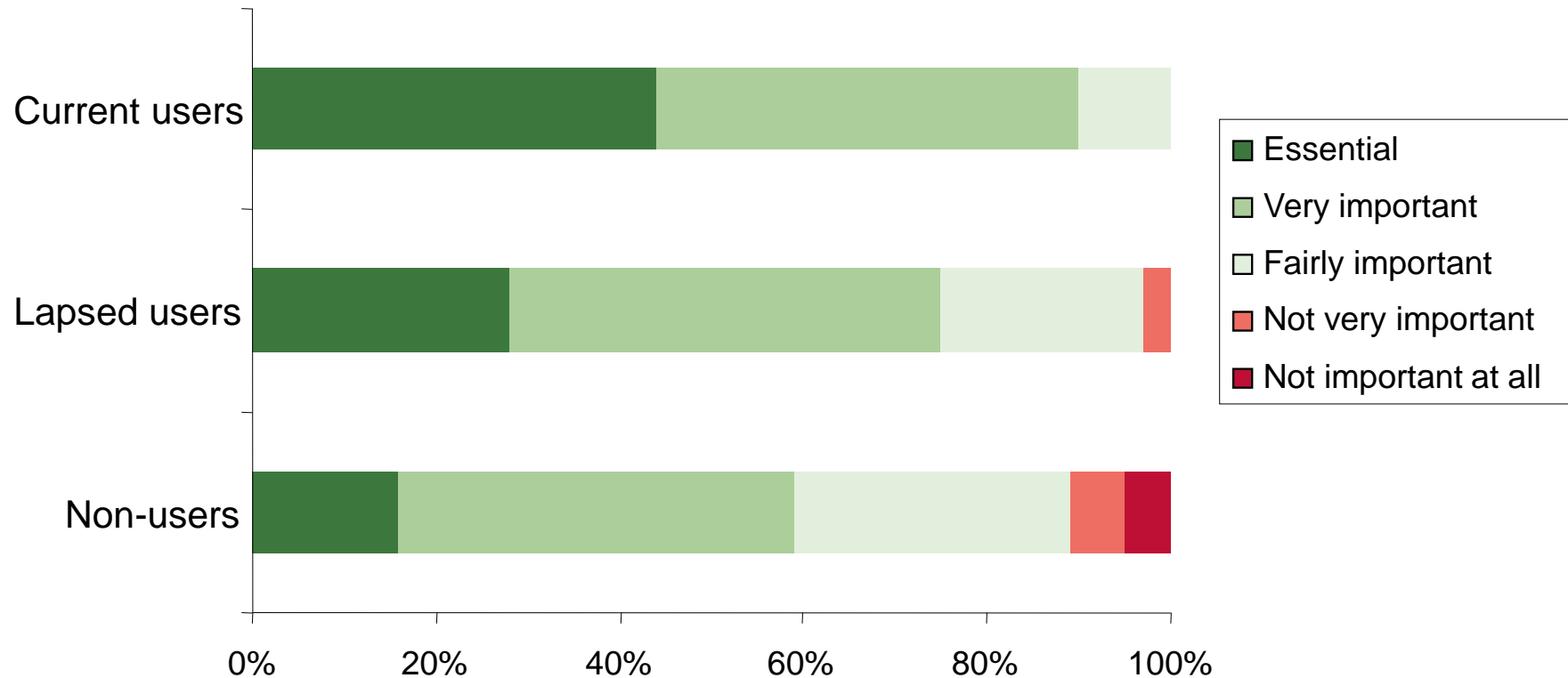
Base: AI respondents (1,102)

Source: Ipsos MORI/MLA, *What do the public want from libraries,* 2010

Digital engagement with libraries

- Taking Part shows that in 2010/11, 16% had visited a library website in the last 12 months
  - A significant increase from 8.9% in 2005/06
- Of those visiting a library website
  - 76% had searched and viewed online information or made an enquiry
  - 38% had completed a transaction, e.g. reserved new items or paid a fine (up from 28% in 2006/7)

Source: DCMS, *Taking Part Survey*, 2011

Libraries as a social leveler

- Childhood library usage is an important predictor of library usage later in life

- People who recall being positively encouraged to read as a child are also more likely to use libraries later in life

- Role in supporting learning, among children and adults

- Libraries reach across the social spectrum – an asset, particularly in building partnerships with other services

- Important in bringing communities together – places where people from different backgrounds and ages can meet

- Research shows that most people think they need to remain free

    - Part of their important social role

- But, some say they would be willing to pay (more) for specific services

    - E.g. a 'premium' membership or pay for some children's activities

Source: Ipsos MORI/MLA, *What do the public want from libraries,* 2010

How satisfied or dissatisfied are you with each of the following services...?

% Satisfaction with service
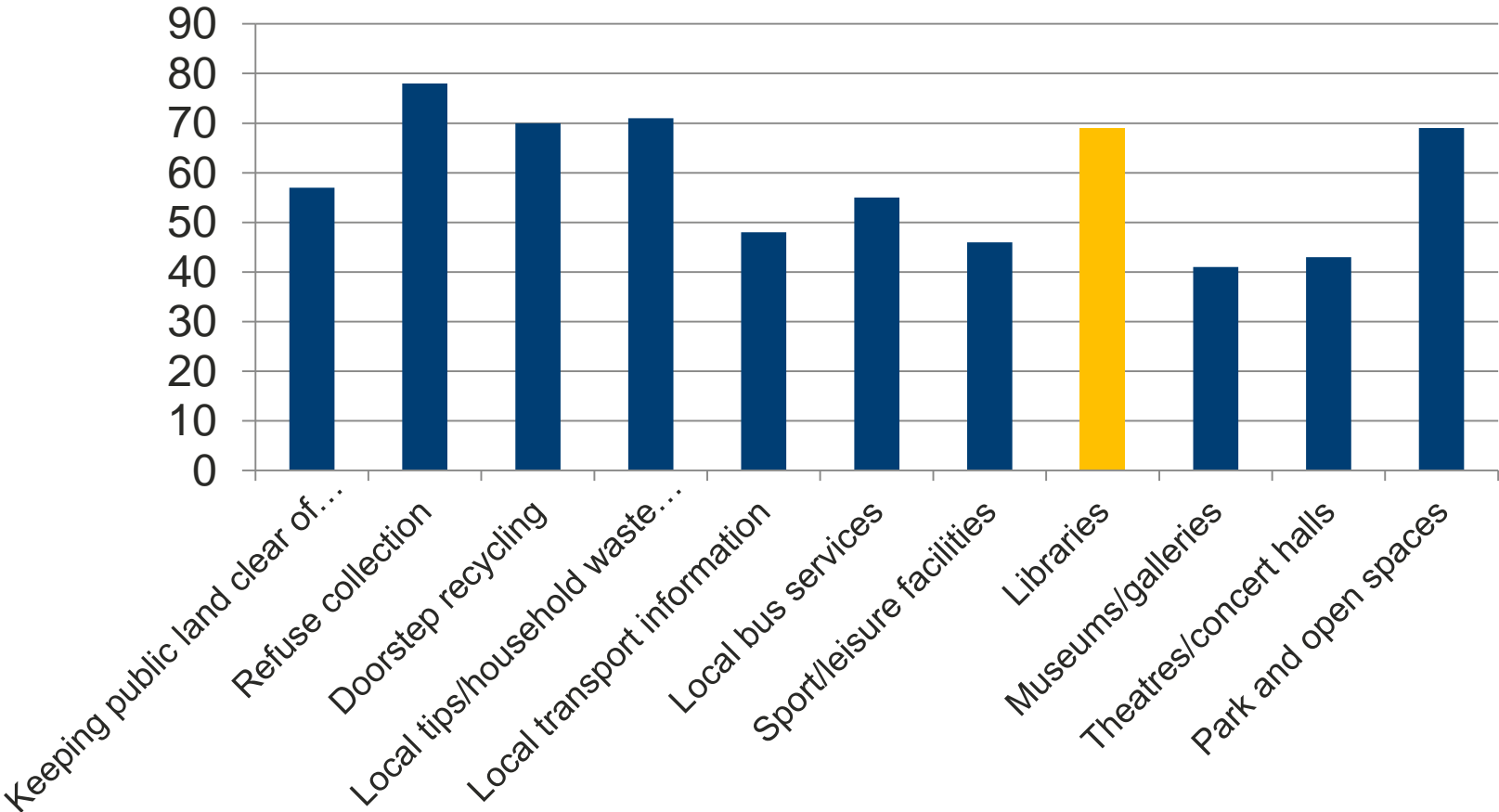
Report ends

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