

# YouGov-Cambridge Briefing: Reputation in the Age of Protest September, 2012



With the YouGov-POLIS Programme for Public Opinion Research



UNIVERSITY OF  
CAMBRIDGE

theguardian



# About us

**YouGov-Cambridge is a unique partnership between Cambridge University and YouGov, which brings polling and academic experts together to collaborate in opinion-research on transnational and global issues.**

These collaborations focus primarily on six key topics of international public opinion: US and UK foreign policy; the Arab Spring; Af-Pakistan; the EU in crisis; climate change and shifting attitudes to globalisation.

In the process, YouGov now collaborates with a range of university research partners, among others including the Department of Politics and International Studies, the Judge Business School, the Centre for Climate Change Mitigation Research, the Department of Land Economy, the Centre for Governance and Human Rights and the Centre for Industry and Government.

Our research partners also include the Wilberforce Society, Cambridge University's own student-run think-tank, where YouGov will support an expanding programme for the academic year 2012-13 of student debates, conferences and online TED events. These activities help to underscore an equally important ambition for the YouGov-Cambridge partnership: to help tomorrow's graduates to engage directly with public opinion research.

As Professor Andrew Gamble, Head of the POLIS Departments, states, the measurement of public opinion "has become a crucial element of our democracies...Access to the polling resources of YouGov can help students test their ideas, and become aware of what lies behind public opinion data...and can also be built into the public policy programmes which are being developed".

For the latest research and updates:

Homepage: [yougov.com/cambridge](http://yougov.com/cambridge)

Contact: [info@yougov-cambridge.com](mailto:info@yougov-cambridge.com)

Twitter: [@YouGovCam](https://twitter.com/YouGovCam)



# Contents

<b>Introduction: The Global View</b>	6
<b>Part I: The Reputation of Nations</b>	11
Case Study: Is Britain a 'Soft Power Superpower'?	
<b>Part II: The Reputation of Organisations</b>	19
Case Study: The Reputation of Banking	
<b>Part III: The Reputation of Political Parties</b>	25
Case Study: The Brand of British Politics	
<b>The Future of Research is Beautiful Data</b>	28
By Stephan Shakespeare	

# Introduction: The Global View

*By Dr Joel Faulkner Rogers (Director, YouGov-Cambridge)*

Reputations can take a lifetime to build – and an instant to pull down. This is an old maxim, but it has never seemed more true than in the current age, where an unfortunate Twitpic can find its way around the world seconds after being snapped. With so many old certainties of power and capitalism under pressure, it is evidently not an easy time to maintain a positive reputation.

This year, YouGov has partnered with *The Guardian*, the British Council and the Royal United Services Institute for its annual conference at Cambridge University to examine how nations, organisations and political parties variously manage reputation in the “Age of Protest”.

In countless ways, these entities occupy different reputational environments. But they also share numerous challenges. As YouGov’s Head of Reputational Research, Oliver Rowe explains that countries as well as organisations require external help in the process of “meta-representation”. This is part of basic social behaviour, unique to humans and explored through neuroscience: we actively monitor and interpret what others think of us and then act accordingly to maximise benefit. Countries and organisations lack the same capacity, facing the need to harmonise multiple, and potentially competing, representations.

Reputations are also personal constructs ‘amongst whom’ and ‘for what’, resting on an amalgam of rational and emotional thinking. This gives organisations, countries and individuals another challenge, notes Rupert Younger, Director of the Oxford Centre for Corporate Reputation: “We all have different reputations for different things, so there can be no such thing as valuing a single reputation”.

## **This is Globalisation 2.0 – and a new challenge to the old fixtures of the Western brand, big business and political centrism**

The reputations of numerous countries and organisations are also connected through broader global dimensions. For a generation of business and political leaders, restoring prosperity is the ultimate backstory to their most pressing problems. Many also reflect the belief that this requires the continued push towards integrating cross-border financial, product and labour markets, which goes by the shorthand of globalisation.

Since the collapse of Lehman Brothers, however, at least three separate, transnational forces of public opinion have combined to challenge the old Western drivers of global integration. These forces include the expanded power of individuals, a new global middle class with ever greater expectations of social and economic progress, plus a widening constituency of discontents unified against the effects of integration itself: blue-collar workers versus the China-effect; white-collar workers versus the India-effect; emerging market farmers against subsidised Western crops; health activists against trade agreements on drug pricing; students and NGOs decrying the gap between rich and poor; the European right bucking against multiculturalism and immigration.

These trends are independently significant, but they add up to a broader development – the arrival of ‘Globalisation 2.0’.

As this year’s Forum will help to explore, the next stage of global integration challenges the overall reputation of three core fixtures from Globalisation 1.0, namely the Western brand, big business and political centrism.

## The shrinking Western brand

Ideas travel along the arteries of commerce and power, and so the period of integration from Soviet to Lehman collapse provided a global transmission-belt for the universal appeal of Western ideas.

Several assumptions in particular came to characterise the global diffusion of American capitalism and a broadly defined Western 'brand' of modernity: first, that where market-economies lead, democratic political systems eventually follow, making free markets and rising living standards ultimately incompatible with autocracy; second, that markets drive progress rather than governments; and third, that developing societies tend to converge towards a roughly similar format for liberal, secular modernity.

In various cases, the new social structures of information and communication are weakening these assumptions. Digital media has become central to a type of civic 'New Deal' between various emerging middle classes and more centralised states. Georgetown Professor of International Relations Charles Kupchan documents how autocrats are learning to co-opt professionals and business elites into a market-authoritarian status quo. In this context, for as long as authorities deliver sufficient economic growth and/or largesse, it is currently proving possible to tolerate limited measures of online freedom – social and sexual, economic and nationalist – as a useful 'steam valve'. Dissent in the name of better services or efficiency has perversely helped in many cases to reiterate the government's obligations, and therefore its ruling legitimacy and theory of state.

Helped along by continued stagnation in Western economies, these dynamics in turn support a rising thesis from developing regions that capitalism in a porous world is better managed with more government, more regulated markets, more planned economies, and less Western hands-off liberalism.

The realities of Internet democracy are further challenging popular faith in the 'Google doctrine', as some call it. This is essentially the latest download of technological determinism, which made a media crescendo in 2011, suggesting that Facebook and Twitter are helping disparate societies to reshape along similar liberal lines.

It's clearly more complicated. Nationalism is going through a major revival on the Web, observes Evgeny Morozov, with members of displaced nations finding each other online, existing nationalist movements delving into freshly digitized archives for their own version of history, and nations arguing about Google Earth borders and territory-listings in Facebook dropdown menus. The wild tiger of digital nationalism is nowhere more evident than in China, where leaders face an ever difficult balance between riding and losing control of it.

Meanwhile, the Arab uprisings suggest that networked empowerment is doing as much or more in some cases to accelerate national, cultural and religious differences, most notably with a new brand of Islamic modernity that breathes religious and social conservatism deep into the public space, while awakening a regional arc of illiberal, sectarian populism.



## The implications for nation-branding

In short, globalisation isn't just shrinking Western material primacy; it's also shrinking the idea of the Western brand as a universal set of political, economic and cultural aspirations.

There are clear implications for public diplomacy and 'nation-branding'. As an embryonic industry, this has so far been roundly confused with 'PR for countries'. But according to Joseph Nye, inventor of the term 'soft power', effective public diplomacy in the 21st Century involves a much larger undertaking in building relationships that facilitate 'enabling-environments' for policy across a complex range of today's state and non-state actors.

As Rowe explains, YouGov research into nation-brands shows a clear link between cultural or physical familiarity and favourability. In simple terms, people tend to feel more positive about places with which they hold an affinity, whether tourists, expatriots, investors, journalists and politicians.

---

*A core proposal of Globalisation 1.0 has been challenged— i.e. the social value-model of trickle-down economics and the notion that everyone benefits from enriching the top.*

---

Consequently, Western governments in the 21st Century face a more complex challenge of affinity, and finding a balance between promoting core values, on one hand, and a more inclusive definition of legitimate governance, on the other. Western public diplomacy and relationship-building need to keep step with the realities of Globalisation 2.0, including a growing diversity of alternative approaches to the civic bargain among people, state and church.

## Big business and the end of trickle-down (?)

Meanwhile, the reputations of two other keystones of Western globalisation are under siege.

One is big business, or at least the contemporary caricature of a profitable corporation. The anti-rich backlash, asserts Gideon Rachman, has gone global. But this is about more than the standard fare of anti-business sentiment that comes with cyclical recession.

A core proposal of Globalisation 1.0 has been challenged across the international public space – i.e. the social value-model of trickle-down economics, as Joseph Stiglitz calls it, and the notion that everyone benefits from enriching the top.

This doesn't mean there's broad appetite for the sort of radical change advocated by some on the American and European Left. As YouGov President Peter Kellner found from cross-country polling in Germany, Britain, Sweden and the United States, there's little support for questioning the market economy in principle, with no real difference in opinion-trends between countries associated with guided 'European' capitalism or the Anglo-Saxon free-market approach.

**Fig 1: Social democracy in focus**

How far do you agree or disagree - net 'agree' figures (the proportion agreeing minus the proportion disagreeing)				
	GB	Germany	Sweden	US
'In general big companies in [country] these days care only about profits – not about the wider community or the environment'	81%	78%	49%	56%
'Who you know is usually more important for getting on in life than hard work and playing by the rules'	50%	27%	42%	17%
'However critical we are of particular government decisions, it remains the case that governments have the power to transform our society for the better'	32%	30%	34%	14%

Source: YouGov Social and Political polling, May 2012, Sample size: various



What is obvious, however, is significant doubt about the way big business now behaves and an amplified tendency to see prospering companies and socio-economic progress as zero-sum. As a YouGov report on attitudes to banking shows later in this booklet, for example, many British retail customers believe major banks in the UK have still generally failed to change their ways in recent years, leaving the common good decoupled from self-interested businesses that are fundamentally “detached from society”. (See the ‘Part II Case Study’ in this booklet)

### **From CSR to SV**

According to Harvard Business School’s Michael Porter, this leaves many companies trapped in an outdated approach to value-creation, if they view it as a natural by-product of normal business, plus a dose of arm’s-length philanthropy via annual budgets for corporate social responsibility (CSR).

From here on, many companies will have to work harder to protect their reputations, and in ways that move beyond the “social responsibility” mind-set. Customers and stakeholders have more power than ever to scrutinise, to protest, and to join standing armies of freelance watchdogs ready for battle. Networked technology and its social effects have also created a new kind of “bubble reputation”, which assumes the volatile, behavioural characteristics of financial markets. Digital leverage among close-knit groups magnifies the epidemic power of a message or idea, as “Tipping Point” author Malcolm Gladwell has explored in his thesis on the “laws of the few”. Confidence can be amplified into speculative bubbles or collapse in hours and minutes with a run on reputation.

---

*Networked technology has created a new kind of “bubble reputation” with the volatile behavioural characteristics of financial markets. Confidence can be amplified into speculative bubbles or collapse in hours and minutes with a ‘run on reputation’.*

---

A significant outcome from these developments is a shift among business-innovators towards “shared-value” models that do more to connect profit with progress at a strategic level, and less to place each in short-term trade-off with the other. According to the management-consultant firm Booz & Company, to be a successful global brand today means being a global attractor, which in turn means incorporating at least three dimensions into a common platform: appealing to aspirational values; being a trend-setter of new ideas and standards; and staking out positions as a responsible global citizen, where social issues and the company’s business intersect organically.

### **The importance of letting go – from business to communism**

In turn, the notion of shared value is also being broadened by consumer empowerment. Few chief executives suggest running a business entirely through open-sourcing and crowd-surfing. But as business analysts Martin Thomas and David Brain note, a growing number of companies accept the idea that relinquishing “some” control of the communications process to public dialogue has become central to managing trust and reputation among customers, employees, investors and other stakeholders, including an open, honest approach to criticism. A trenchant example of this approach can be seen with McDonalds, having taken steps as bold as listing calorie-counts on menus and uploading footage of slaughterhouses on open company blogs.

Effective brand strategies no longer rest on the old way of command and top-down centralised control, according to media company Raconteur, and consumers no longer want force-fed advertising. Successful brands are shifting away from being assets owned by corporations towards being socially constructed, collectively owned and shared identities. Brand-owning companies are not like armies, proclaims Vicky Bullen, Chief Executive of the branding agency Coley Porter Bell: you can’t just order people to be consistent; you have to make them want to be consistent.

It's a small irony, therefore, that the reputational challenge facing big business in this regard is not entirely dissimilar from the challenge faced by the Chinese Communist Party and other market-authoritarian governments. Letting go and giving stakeholders a greater say in the way things are run, add Thomas and Brain, is paradoxically now the most effective way to ensure a degree of control over the destiny of many organisations.

### **Where is the new political centre?**

Finally, the reputation of political centrism itself is under pressure. The initial stages of post-Cold War globalisation were a golden age for the Third Way philosophy of economic dynamism plus social security that characterised the governments of Bill Clinton, Tony Blair, Gerhard Schröder and other avowed, post-Soviet centrists.

But while globalisation gives rise to more state-centric government beyond the West, the centre-ground is contracting within its borders.

The last midterm US elections significantly reduced the number of moderate Democrat seats in Washington while the GOP saw incursions from the Tea Party. These developments supported a new partisan voracity on Pennsylvania Avenue and ultimately helped to persuade credit rating agency Standard & Poor's to downgrade the country's AAA-credit rating, following Congressional paralysis in raising the US borrowing limit.

In Europe, the combined effects of recession, outsourcing, immigration, multiculturalism, ethnic tensions and the threat of terrorism have given boost to populist xenophobia and fringe right electoral gains from east to west. Mainstream European opinion has seen a softer but renascent nationalism, catalysing what various analysts perceive as a potentially historic contradiction between institutions and politics, with the former pushing to become more European while the latter grows more national. As YouGov-Cambridge polling duly shows, significant majorities across Europe believe their country is losing its traditional culture, that society is becoming increasingly divided because of immigration, that annual limits should be applied to the number of immigrants allowed to stay in their country, and that Muslim communities are failing to integrate with mainstream customs and ways of life.

In Britain, the major parties are struggling to pass what Immigration Minister Damian Green has called the "Danny Boyle test", after the film director oversaw an Olympic opening ceremony that was praised – as well as criticised – for its ambitious attempt to incorporate multiple faces of modern Britain into a common identity.

Elections are typically won at the centre, goes the saying, and in the coalition era of a divided electorate, all three big party-leaders are seemingly struggling to locate and occupy a broadly persuasive definition of the 'Olympic common ground', as Green suggested. Hard times are emphasising the differences between Hard Left and Hard Right, while smaller parties are fielding effective single-issue insurgencies.

The purpose of this year's YouGov-Cambridge Forum is to explore these and other challenges of reputation, in an age when the direction of globalisation is shifting and the primacy of Western assumptions are being squeezed by a new and chaotic superpower: global public opinion itself.

We invite this new superpower to join the discussion on Twitter using **#YGC2012**.

---

*In Britain, the major parties are struggling to pass what Immigration Minister Damian Green has called the "Danny Boyle test".*

---

# Part I: The Reputation of Nations

## Case Study: Is Britain a ‘soft power superpower’?

By Dr Joel Faulkner Rogers (Director, YouGov-Cambridge) and Sean Kirwan (Research Fellow, YouGov-Cambridge)

If hard power equals the ability to get your way through coercion or payment, then soft power, as Harvard University’s Joseph Nye famously suggested, reflects a different ability to persuade and influence merely through attraction or respect towards what you are, what you do and what you reflect in aspirational terms.

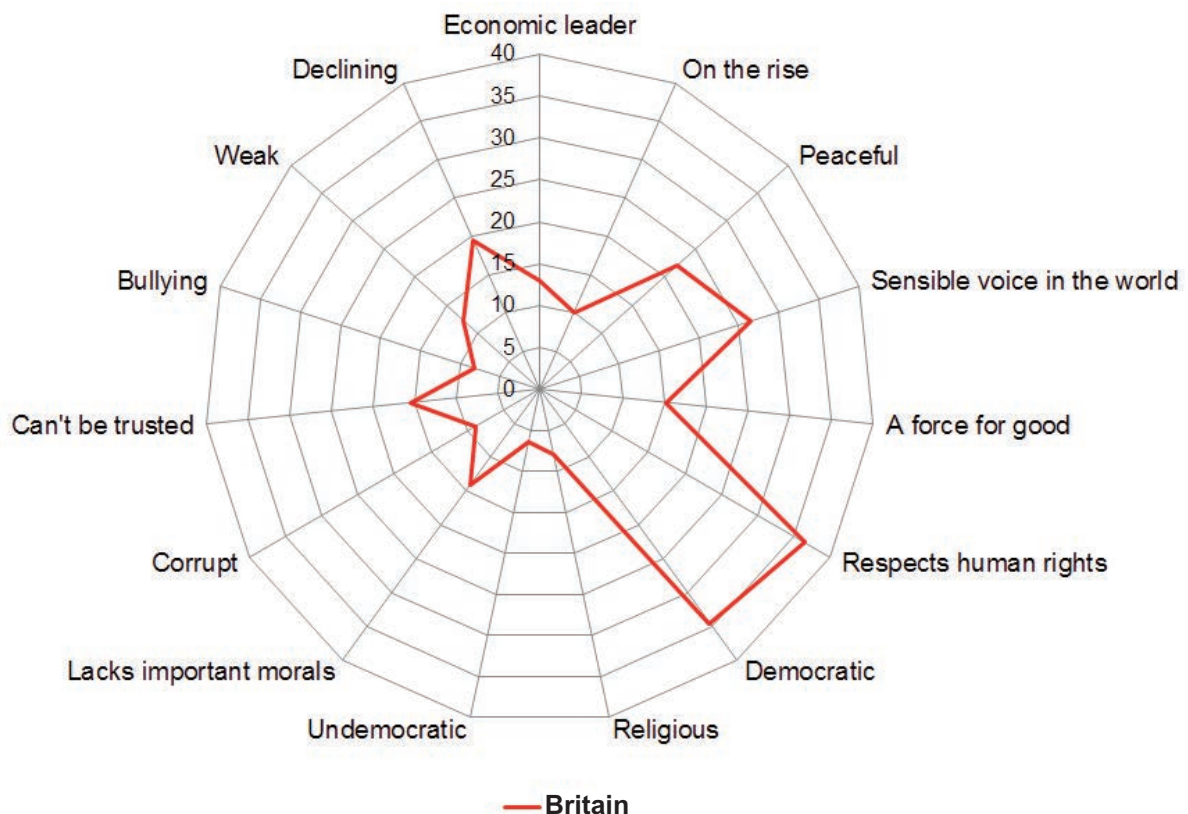
Britain’s historic hard power status seems all but gone, but according to a major cross-country study by YouGov, Britain arguably ranks among the ‘soft power superpowers’ of the 21st Century.

### Britain has a strongly positive brand, both absolutely and relatively

The survey included nationally representative samples in the United States, Britain, France and Germany, plus a pan-regional sample of the Middle East and North African (the MENA), and a sample of the online populations in Pakistan and China.

As the results suggest, Britain is widely valued as a peaceful, respectful, sensible voice in the world. Respondents in all survey-countries (except for China) were asked to choose three or four characteristics they associate most with Britain, from a list of positive and negative options including: ‘Peaceful’, ‘Democratic’, ‘On the rise’, ‘Economic leader’, ‘A force for good’, ‘Respects human rights’, ‘A sensible voice in the world’, ‘Undemocratic’, ‘Can’t be trusted’, ‘Corrupt’, ‘Declining’, ‘Lacks important morals’, ‘Religious’, ‘Weak’, and ‘Bullying’.

Fig 1: Cross-country attitudes to Britain (average of data from US, MENAP, France, Germany)



Source: YouGov-Cambridge cross-country poll, 10th-25th August, Sample size: various

According to international public opinion, the Britain's defining 'personality' traits overall are 'Respects human rights', 'Democratic', 'A sensible voice in the world' and 'Peaceful'. Individual country responses varied slightly, but in each case, the most common characteristics were consistently chosen from the positive list.

### **British people view Britain as significantly weaker and more in decline than other countries do**

Among Western countries surveyed (Britain, US, France, Germany), the only negative term to appear consistently was 'Declining'. Significantly, however, British respondents were more likely to see Britain as both weak and in decline than people from other countries.

40% of British respondents described Britain as 'Declining'. In contrast, only 16% of US and German respondents respectively said the same, along with 16% of respondents in France and Pakistan, and 11% of respondents overall in the MENA.

Similarly, where 24% of British respondents described Britain as 'Weak', significantly fewer respondents said the same in all other countries. (Respectively: 8% in the MENA; 11% in Pakistan; 10% in the US; 13% in Germany and 7% in France).

### **Imbalanced affections in the Special Relationship**

British results also suggest a potentially imbalanced transatlantic love-affair in cultural terms. Except for 'Declining', respondents in the US gave Britain a glowing report, with the most common perceptions being 'Respects human rights', 'A sensible voice in the world', 'Peaceful', 'A force for good' and 'Democratic'.

In contrast, the most common British perceptions of the US were 'Bullying', 'Economic leader', 'Religious', 'Democratic', 'Lacks important morals' and 'Can't be trusted'. While only 15% of Americans said they didn't trust Britain to act responsibly in the world, 41% of British people said the same about the US.

How does Britain's international image compare?

### **A broadly negative 'American brand'**

The same question measuring the most common characteristics was asked about the world's two leading powers: the United States and China.

Perceptions of America's 'international personality' portray a broadly negative picture across all countries except for Germany, where commonly selected negatives are mixed with popular perceptions of the US as 'A Sensible voice in the world'.

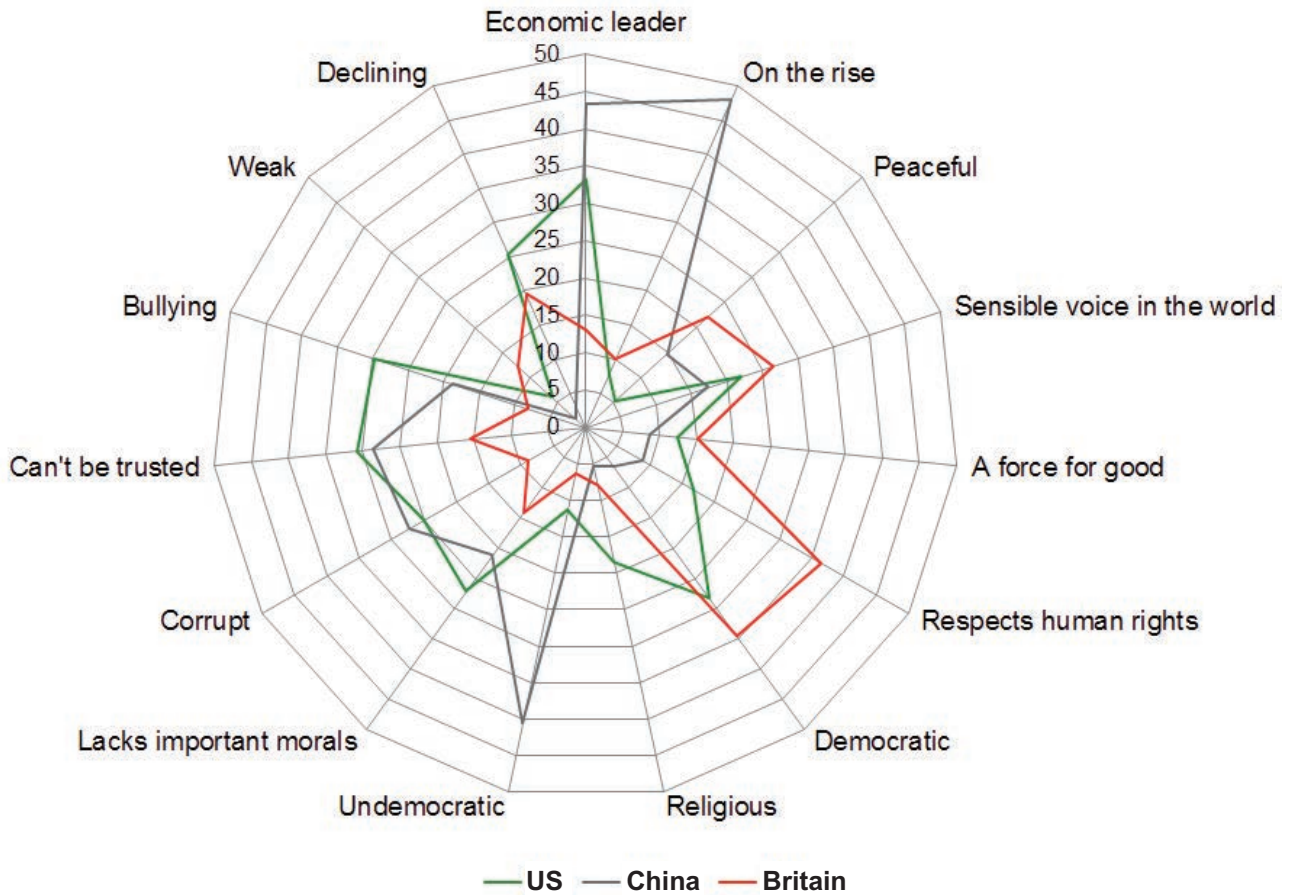
The only positive characteristic consistently associated with the US is 'Economic leader', with the international public showing more faith in America's continued economic leadership than Americans themselves. (Respectively selected by 29% in the US, compared with 36% in Germany, 43% in France, 33% in Britain and 34% in the MENA)

Beyond 'Economic leader', the most common attributes associated with the US overall were, 'Can't be trusted', 'Bullying', and 'Lacks important morals' vying closely for fourth place with 'Democratic'. All sixteen countries in the MENA ranked 'Can't be trusted' as the trait they most associate with the US, with twelve out of sixteen countries in the region including 'Corrupt' among the most common characteristics.

Perhaps unsurprisingly, given on-going instability in the 'Af-Pak Theatre', the most common impressions towards the US in Pakistan are strongly negative, including 'Can't be trusted' (say 66%), 'Lacks important morals' (48%), 'Bullying' (34%) and 'Declining' (33%).

Public opinion in Pakistan duly shows strong anti-American sentiments throughout. 78% of Pakistani respondents say they don't trust the US to act responsibly in the world, versus 41% in Britain, 63% in the MENA, 18% in the US itself, 49% in Germany and 40% in France.

Fig 2: Cross-country comparison of attitudes to US, China and Britain (average of US, MENAP, FR, Britain)



Source: YouGov-Cambridge cross-country poll, 10th-25th August, Sample size: various

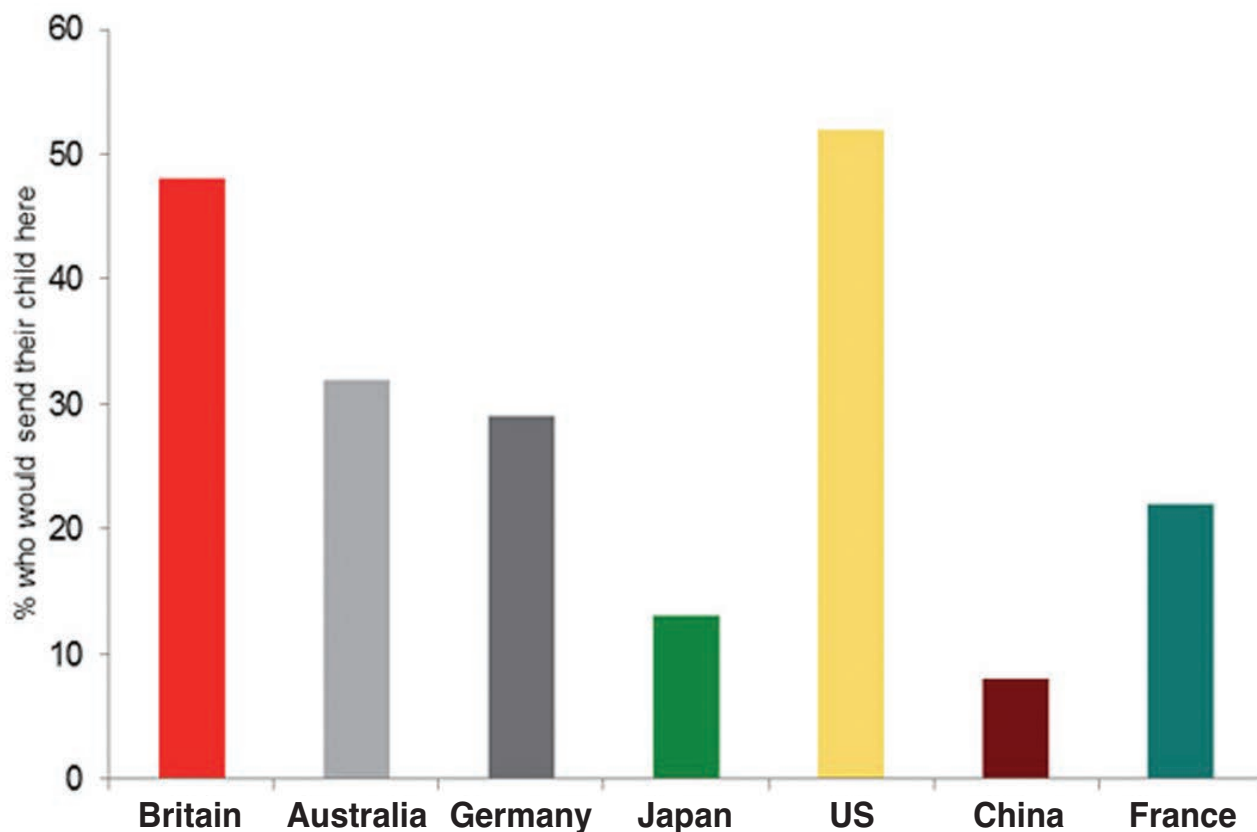
### Britain is a global leader in education

By comparison, Pakistani attitudes to Britain help to emphasise two important trends about British ‘soft power’.

First, that the UK is viewed as a global leader in education on a par with, or in various cases preferred over, the US as the best place to receive a university education.

All respondents were asked where they would choose from a list of eighteen countries if they had to send their child to receive a university education in another country. Pakistanis ranked Britain in clear first with nearly 60%. These results followed a larger trend: so did respondents in the MENA, the US and Germany. In France and China, Britain was ranked second behind the US.

**Fig 3: Cross-country comparison of preferred education destination (average of data from US, Britain, China, MENA, Pakistan, France and Germany)**



Source: YouGov-Cambridge cross-country poll, 10th-25th August, Sample size: various

### **British soft power in Pakistan has survived the Afghan War**

Second, that despite the close alliance of US and UK policies in the region, Britain has managed to retain a more neutral identity in Pakistan.

In contrast to perceptions of its American ally over the Afghan border, many Pakistanis still view Britain as 'Peaceful', 'A sensible voice in the world' and 'Democratic' (although these attitudes sit alongside perceptions of Britain as 'Can't be trusted', as duly noted in the following section.)

Similarly, in a question measuring cultural affinity or aspirational appeal, respondents in all countries were asked to say where else (in a choice of eighteen countries) they would recommend someone to live if they had leave the respondent's own country. Pakistani respondents duly ranked Britain in second place behind Australia and above fellow Muslim country Turkey. (NB: it is worth noting in these results that Australia consistently ranks highest by far in any questions of alternative country choices, even for countries with no obvious cultural or geographic affinity, in a likely demonstration of what can be called the 'exotic effect').

### **Britain has a consistent 'trust deficit' across the Arab and Islamic world**

But it's not all good news for British reputation. In both non-Western samples (MENA and Pakistan) respondents also consistently listed 'Can't be trusted' among their choices overall, suggesting a substantial trust-deficit for Britain across Arab and Islamic populations.

Results are notably uniform throughout different MENA countries in this respect, with exactly the same top four choices – 'Democratic', 'Respects human rights', 'A sensible voice in the world' and 'Can't be trusted' – listed by respondents from Algeria, Tunisia, Egypt, Jordan, Libya, Iraq, Kuwait, Saudi Arabia and the Palestinian Territories.

This is a deficit more than a crisis. The number of respondents in Pakistan was evenly split between those who did and did not trust Britain to act responsibly on the world stage (47% in each case). In the MENA, 41% of respondents overall said they trusted Britain to act responsibly, versus 48% who did not. This compared with 67% v. 15% of Americans, 56% v. 37% of Germans and 50% v. 41% of French who similarly trusted Britain to act responsibly.

### It's not all bad for American soft power

As a leading authority on country reputations, Simon Anholt notes that nation-brands can often vary across individual dimensions. People might have misgivings in terms of perceived contribution to international peace and security, for example, while ranking a brand highly in economic or cultural areas.

Accordingly, various soft-power indicators suggest the American brand is down but hardly out in cultural and aspirational appeal.

Respondents in Britain, Europe and China ranked the US as overall first choice out of eighteen countries for where they would send their own child to receive a university education in another country. In the MENA, the US was ranked overall second and even in Pakistan was ranked third. Given the sheer degree of anti-American sentiment in Pakistan, this suggests a remarkable depth in perceived opportunity and value linked with US education and thought-leadership.

Similarly, when asked to recommend somewhere else to live for someone leaving the respondent's own survey-country, people in Britain, Germany, France and China ranked the US in second place behind Australia (note again the 'exotic effect'). Even in the MENA and Pakistan, the US was ranked fourth and fifth respectively out of eighteen countries.

### US-China soft power rivalry in the Middle East

US policy-makers should take a note of caution if they view the recent Arab Spring uprisings as an embrace of American values. In various cases, America has a more negative reputation than its closest superpower rival, China, in dimensions such as corruption, morals, trust and bullying.

Roughly similar numbers of people in the region describe the US and China as 'Undemocratic' (22% and 23% respectively). China scores marginally higher than the US as 'A sensible voice in the world', (21% v. 18% respectively), and although Washington frequently raises the issue of China's human rights record in official meetings between the two states, it seems both countries are viewed in nearly similar terms by publics across the MENA, with 24% choosing 'Respects human rights' in their top four choices of words to describe the US, versus 17% saying the same for China. (see Figure 4)

**Fig 4: US-China soft power rivalry**

Looking at the words and phrases in the boxes below, which ones do you associate MOST with the United States and China? Results from the Middle East:		
	China	US
'Can't be trusted'	24%	54%
'Corrupt'	12%	33%
'Lack important morals'	19%	33%
'Bullying'	10%	29%
'Undemocratic'	23%	22%

Source: YouGov-Cambridge cross-country study, August 2012

## China widely predicted to overtake the US – but with serious image problems

This is not to say that China has an overtly positive international reputation by contrast.

The most common characteristics associated with China are broadly – and predictably – ‘On the rise’ and ‘Economic leader’. Large numbers across Britain, Germany, France, MENA, Pakistan and China duly agree that the world's leading power in 20 years' time will be China. The only exception here is the US, where Americans are broadly divided on the question, with 32% saying the world's leading power in 20 years will still be the US versus 30% who think it will be China. (see Figure 6) It should also be noted that Pakistan and France stand out with significant numbers who suggest China may have already overtaken America's leading status. (55% and 37% respectively – see Figure 5)

*Fig 5: Leading powers today*

Which ONE of the following do you think is the world's leading power today?							
	GB	MENA	Pakistan	US	Germany	France	China
United States	49%	54%	36%	55%	49%	34%	62%
China	25%	16%	55%	21%	21%	37%	29%
Germany	4%	3%	1%	1%	5%	8%	0%
Britain	1%	2%	0%	1%	0%	1%	0%
Russia	1%	5%	1%	1%	3%	1%	0%
European Union	2%	5%	2%	1%	5%	3%	1%
India	1%	1%	1%	1%	1%	2%	0%
Brazil	0%	0%	0%	0%	0%	2%	0%

Source: YouGov-Cambridge cross-country study, August 2012

Results further emphasise high levels of confidence among Chinese people towards their country's inevitable rise as the next global hegemon. Among all counties surveyed, China shows the largest number of people – nearly 60% – who predict their country will become the world's leading power.

*Fig 6: Leading powers in 20 years*

And which of the following do you think will be the world's leading power in 20 years' time?							
	GB	MENA	Pakistan	US	Germany	France	China
United States	14%	11%	7%	32%	14%	13%	24%
China	47%	39%	71%	30%	41%	41%	59%
Germany	1%	4%	1%	1%	4%	4%	1%
Britain	1%	2%	0%	1%	0%	1%	0%
Russia	3%	5%	2%	1%	4%	3%	1%
European Union	2%	7%	2%	2%	9%	10%	2%
India	6%	6%	4%	2%	6%	16%	0%
Brazil	3%	1%	1%	1%	1%	8%	0%

Source: YouGov-Cambridge cross-country study, August 2012

In terms of hard power, therefore, China is viewed by many as on the path to pre-eminence.

But this doesn't mean China is liked in equal measure to being feared or perceived as powerful. Results further indicate that China potentially has what Joseph Nye calls a 'soft power deficit'.



Beyond the recognition of increasing power, China's international personality is widely associated with numerous negative traits that span different countries and regions. After 'Economic leader' and 'On the rise', the most common characteristics associated with China overall are 'Undemocratic', 'Can't be trusted', 'Corrupt', 'Lacks important morals' and 'Bullying'.

Majorities or pluralities in all countries except Pakistan (see Figure 7) also say they have little or no trust in China to act responsibly in the world.

Furthermore, the raw economic power of China's export growth model may sit at the centre of its international reputation. But results also indicate that China is so far failing to establish itself as a perceived hub of must-have products and recognised brands. Respondents were asked, "If you were thinking of buying a product, from which of the following countries, if any, would you be more likely to buy that product?" Only in Pakistan did respondents rank China in their top choices. Just 15% did the same in Britain and MENA; only 12%, 9% and 7% did in the US, Germany and France respectively.

If soft power, as Nye describes, is 'the ability to get what one wants by attraction and persuasion rather than coercion or payment', then China could face significant challenges in the court of international public opinion as it continues to grow more powerful.

**Fig 7: Trust in China**

<b>To what extent, if at all, do you trust China to act responsibly in the world?</b>						
	<b>GB</b>	<b>MENA</b>	<b>Pakistan</b>	<b>US</b>	<b>Germany</b>	<b>France</b>
Trust a lot	1%	12%	65%	2%	2%	2%
Trust a little	12%	26%	26%	13%	12%	12%
<b>TOTAL TRUST</b>	<b>13%</b>	<b>38%</b>	<b>91%</b>	<b>15%</b>	<b>14%</b>	<b>14%</b>
Do not trust much	39%	26%	4%	28%	26%	34%
Do not trust at all	38%	23%	2%	40%	51%	42%
<b>TOTAL DO NOT TRUST</b>	<b>77%</b>	<b>49%</b>	<b>6%</b>	<b>68%</b>	<b>77%</b>	<b>76%</b>
Don't know	11%	13%	3%	17%	9%	10%

Source: YouGov-Cambridge cross-country study, August 2012

### **Pakistan – China's greatest fan**

The clear exception in attitudes to China is Pakistan, where the most common perceptions among respondents include 'Peaceful', 'A sensible voice in the world', 'A force for good' and 'Respects human rights'. Pakistani attitudes to China and the US therefore seem diametrically opposed.

According to Pakistan expert and YouGov-Cambridge advisor Dr Humeira Iqtidar, these trends underscore the extent to which China is viewed by a large majority as a benign neighbour and a useful foil against US and Indian influence, both across the region and within Pakistan itself.

In a separate survey of urban Pakistanis, 86% of respondents said China was Pakistan's most important neighbour in a choice of India, Iran, China and Afghanistan. When asked to what extent respondents approve or disapprove of the governments of other countries, China was ranked a high first out of eight countries, with 91% of respondents overall saying they approved of the Chinese government.

By comparison:

- 12% strongly approved of the European Union ( 55% approved in total);
- 11% strongly approved of the British government (54% approved in total);
- 9% strongly approved of the Russian government (53% approve in total);
- 6% strongly approved of the Indian government (39% approved in total);
- 8% strongly approved of the US government (36% approved in total);
- 4% strongly approved of the Afghan government (27% approved in total);
- 3% strongly approved of the Israeli government (9% approved in total).

As Dr Iqtidar adds, the alluring example of the Chinese economic miracle has also potentially taken root in the imagination of politicians, business leaders and the general population, as a powerful example of alternative paths from American and Western models.

Survey results duly support the suggestion that Pakistani respondents may represent less Western attitudes to development-economics and the role of government. Respondents in all countries surveyed (except for China) were asked what they would consider more important for their country, if they had to say, between having a strong economy or having a system of government based on democracy.

Results from Britain, MENA, US, Germany and France produced a varied spread of responses reflecting the importance of both options in the perception of most samples. Pakistan presented a stark contrast, however, with 77% choosing ‘a strong economy’ and only 22% choosing ‘a system of government based on democracy’. (see Figure 8)

**Fig 8: Strong economy v. Democracy**

If you had to say, which is more important for your country – having a strong economy or having a system of government based on democracy?						
	GB	MENA	Pakistan	US	Germany	France
Having a strong economy	38%	44%	71%	41%	35%	41%
Having a system of government based on democracy	46%	41%	22%	41%	52%	41%
Don't know / prefer not to say	16%	16%	7%	18%	13%	18%
Don't know	11%	13%	3%	17%	9%	10%

Source: YouGov-Cambridge cross-country study, August 2012

Between 10-25 August 2012, YouGov questioned 12693 adults online in Britain (sample size: 2027), France (sample size: 2172), Germany (sample size: 1999), the US (sample size: 2038), the Middle East & North Africa (Overall sample size for the MENA: 2220), Pakistan (sample size: 1234) and China (sample size: 1003). Data was weighted to be nationally representative of adult populations in Britain, France, Germany and the US. Data in the Middle East & North Africa (MENA), Pakistan and China has been taken from the online population.

# Part II: The Reputation of Organisations

## Case Study: The Reputation of Banking

By Oliver Rowe (Director, Reputation Research, YouGov)

### Reputation of banks at low ebb but the public believes they are critical to UK's economic growth

The reputation of British banking was hit hard this summer as all four of the UK's major banks ran into problems. RBS suffered a serious computer glitch, Barclays was caught fixing Libor, HSBC was fined for money laundering in Mexico, and a Lloyds employee admitted major fraud. This was all against a backdrop of PPI mis-selling, interest rate swap mis-selling, Standard Chartered being fined for Iranian dealings, and Spanish banks needing a bailout. It led to RBS Chief Executive Stephen Hester stating that banks had become "detached from society".

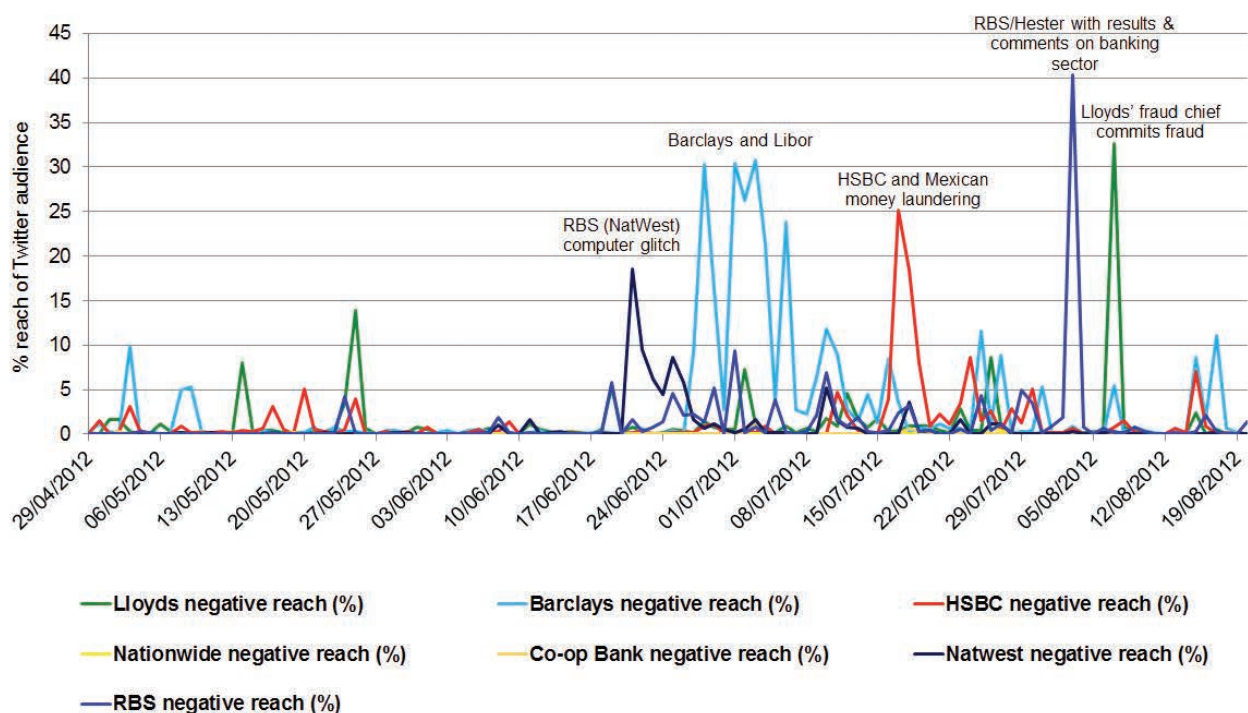
YouGov research shows that Mr Hester's comments are correct and a gulf exists between banks and their customers. While 42% of UK adults polled in August 2012 feel that "British banks can be good citizens", their reputation is at a very low ebb. Retail customers believe the major banks have poor ethical and moral standards, have failed to learn the lessons of the financial crisis, and are treating their customers unfairly. Despite this, 78% believe 'Banks are critical to getting the UK economy growing again', a role which could provide a chance for reputational amelioration.

"With most of the banking scandals, I don't even think about the individual banks involved - I just think that it's representative of the sector as a whole." - UK Bank Customer

### SoMA – social media monitoring

SoMA (Social Media Analysis), a YouGov tool which monitors the Twitter feeds and Facebook pages of members of our UK research panel, measured the reach of the summer's banking stories through social media. It provides an instant read of the severity of news stories, and it showed how the Barclays/Libor story dominated the sector but that other events also had a wide reach.

Figure 1: Negative comments on Twitter during summer 2012



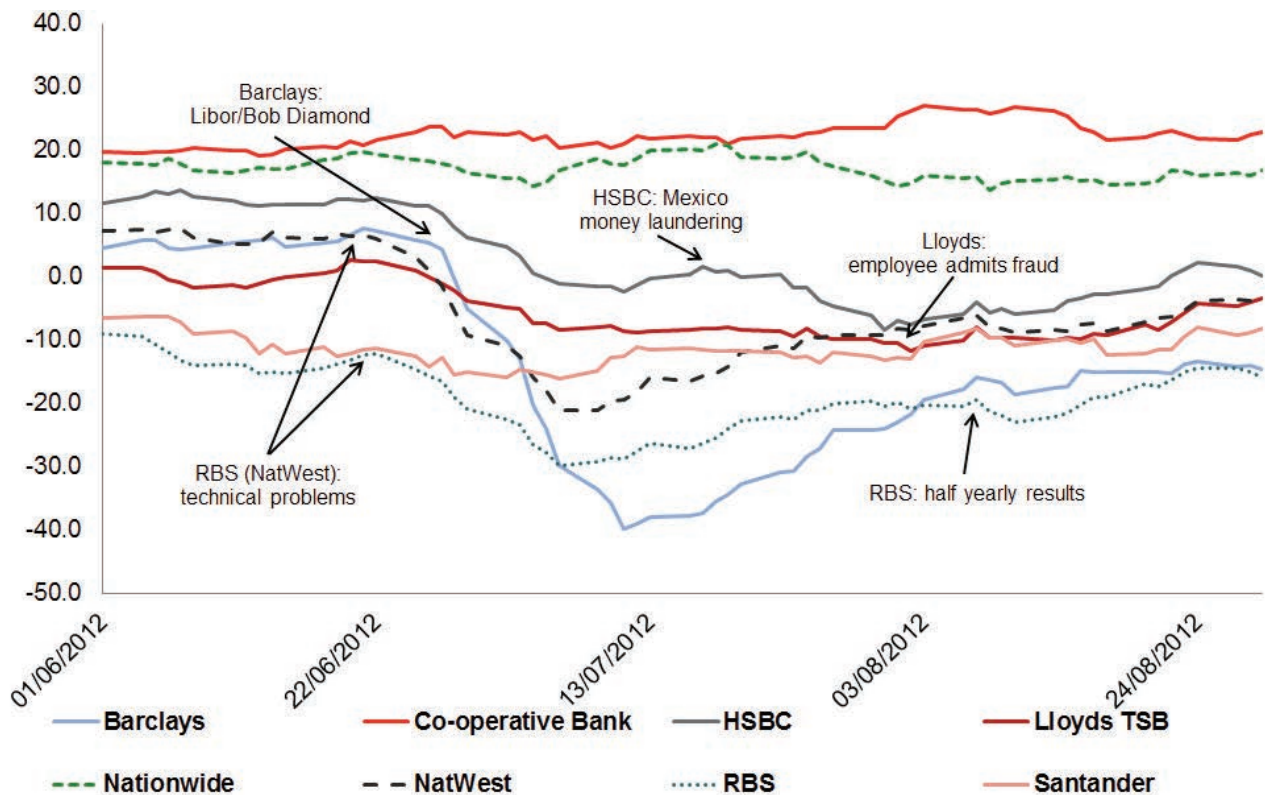
Source: YouGov SoMA, monitoring of representative panel of Twitter users' feeds

Negative Tweets about Barclays/Libor reached over 70% of Twitter users across the summer, with other banks often being mentioned at the same time. Negative Tweets for NatWest reached a peak audience of just 18%, but RBS' results and Stephen Hester's comments in early August reached over 40%.

### BrandIndex – daily tracking of consumer attitudes

YouGov's 'BrandIndex' monitors consumer attitudes to brands every day, and it shows Barclays reputation score fall from +5 to -40, almost twice that of rivals NatWest (+6 to -20) or RBS (-12 to -29). Here reputation refers to the pride or embarrassment a person might feel working for a company, and the Barclays score is lower than that of BP during the Macondo well disaster (-33). Yet by August 22nd Barclays' score was already recovering and back to -16, compared to -19 for RBS. Scores for all banks were driven down by older, better off, male respondents in particular, with the RBS glitch and Libor scandals bringing all larger banks down.

Figure 2: BrandIndex 'reputation' of UK banks



% of UK adults saying they would be proud or embarrassed to work for the brand  
Source: YouGov BrandIndex, sample size 1,250 over two week period

### Deeper Reputation of Companies by Customers

When measuring reputation a little more deeply, the key markers are familiarity of an organisation, how favourable someone feels towards it, and what they know about it. For favourability, the banks in our study scored between 4 and 5 out of 10, with RBS and Barclays below BP, and all banks well below Sainsbury's and the BBC.

Looking only at the responses of each bank's customers, Barclays comes last for favourability, with customers rating it 5.5, compared to 6.2 for RBS, 6.6 for Lloyds and 6.8 for HSBC, amongst each bank's own customers. The Co-operative Bank scores 7.8, putting it above the BBC's score.

When customers rate the banks against 12 key reputation attributes (Figure 3), we find:

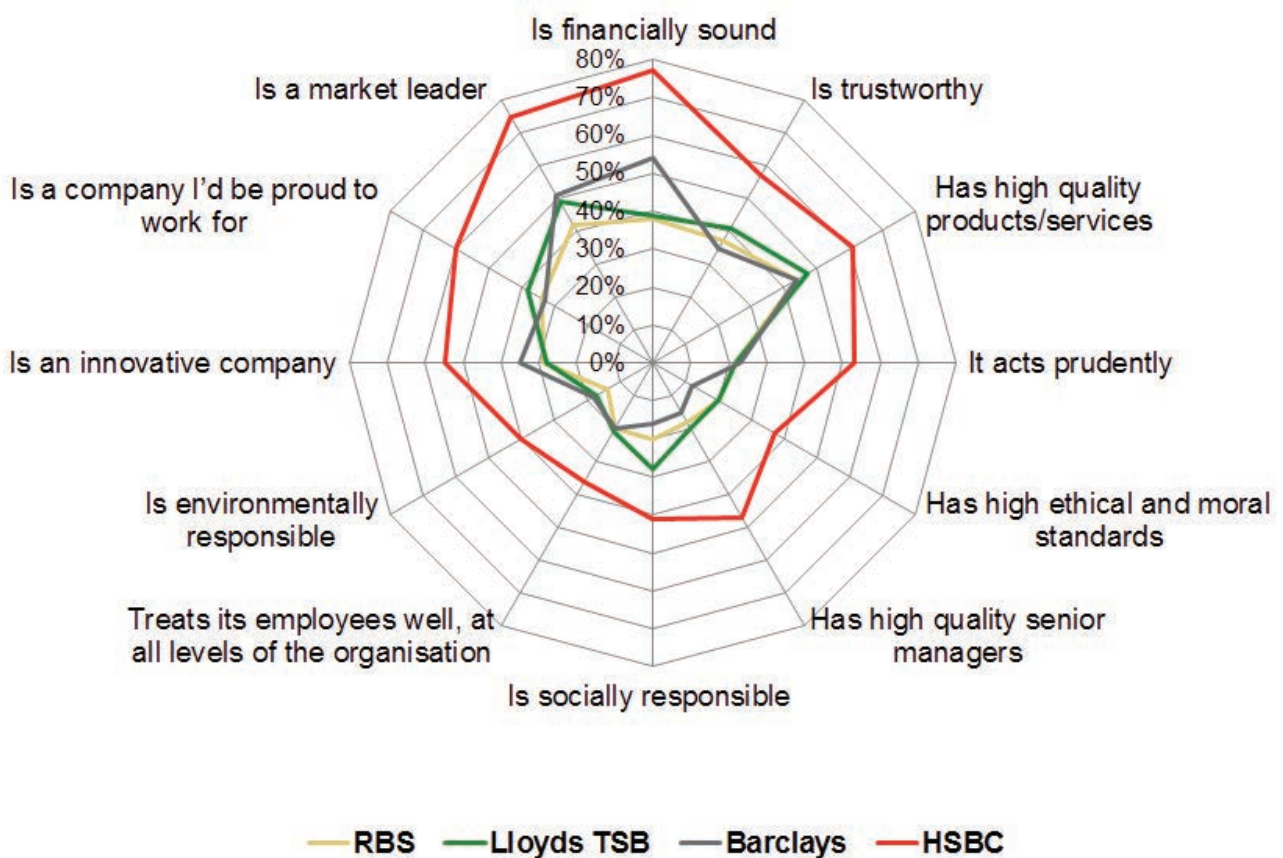
HSBC: leads the way on every measure with clear blue water between it and the other three majors, including being the market leader (also chosen by 36% of the UK adults sampled);

Barclays: perceived by customers to be more financially sound than RBS or Lloyds TSB, but with lower ethical/moral standards and poorer senior management;

Lloyds TSB: performs poorly across all measures, but just staying above RBS and showing a little differentiation in being slightly more socially responsible;

RBS (NatWest/Ulster/RBS): on average it has the lowest reputation of the big four amongst customers and non-customers on these measures.

Figure 3: Account holders' attitudes towards main four high street banks (% agree)



Base: main account holders of 4 banks, sample size varies

Source: YouGov, 21-23 August 2012. 2,061 representative UK adults aged 18+

“[The banks] have no idea about real customer service.” UK bank customer

### Financially Sound and Prudent

When choosing a provider, customers say they prioritise those they consider to be financially sound, and with that, prudent. However less than a quarter of customers at Barclays, Lloyds TSB and RBS (NatWest/Ulster/RBS) consider their banks to be prudent and only a half or less consider them to be financially sound.

**Figure 4: Belief that UK banks are prudent or financially sound**

How far do you agree or disagree?				
“it acts prudently”	% of customers who agree or agree strongly		“is financially sound”	% of customers who agree or agree strongly
Co-operative Bank	80%		Co-operative Bank	80%
Nationwide	65%		HSBC	77%
HSBC	53%		Nationwide	75%
Barclays	23%		Barclays	54%
Lloyds TSB	22%		Lloyds TSB	39%
RBS (NatWest/Ulster/RBS)	22%		RBS (NatWest/Ulster/RBS)	38%

Source: YouGov, 21-23 August 2012. Sample size: 2,061 representative UK adults aged 18+

### Trust and Ethics

What has undermined the position of the banks, beyond how financially sound they may be, is the lack of trust consumers have in them. April 2012's "Trust in Financial Services" report, published by YouGov SixthSense, shows only 28% of the UK public agree that "In general, you can trust high street banks" although a minority consider any given bank to be 'untrustworthy'. The figure below actually shows how few people state that they actively distrust any particular bank.

**Figure 5: Trust of high street bank brands**

	It's the sort of brand that I don't trust	It's much the same as most brands and I don't trust it more than others	I trust it more than other brands*
Co-operative Bank	4%	18%	72%
Nationwide	4%	32%	56%
HSBC	8%	42%	41%
NatWest	10%	50%	32%
Barclays	10%	48%	32%
Lloyds TSB	11%	49%	31%
Royal Bank of Scotland	14%	54%	25%

\*This score merges three measures: "It isn't very different from other brands but I do trust it more", "It stands out as being somewhat more trustworthy than other brands", "It's a unique brand which I really trust more than other brands".

Source: YouGov SixthSense 'Trust in Financial Services' April 2012. Sample size: 2,060 representative UK adults aged 18+

A survey of UK opinion formers (July 2012) by YouGov finds 94% agreeing that "the Barclays interest rates scandal is symptomatic of a widespread problem of ethics in the UK banking industry", and 80% of the public sampled in August also agree.

These ethical concerns surface amongst MPs when asked about the wider economy. A representative sample polled in July 2012 by YouGov finds that 44% of MPs agree that 'large UK firms have good ethical and moral standards' but 33% disagree and 23% sit on the fence, while just 29% agree that 'in general these days CEOs of large UK businesses promote a culture of responsibility', as recently called for by Chancellor George Osborne.

## Sector Attitudes

The banking sector now sits extremely low in the public's opinion:

- 70% think 'British banks are driven by greed';
- Half (51%) feel that 'British banks have lower ethical standards than other major UK businesses such as manufacturers, pharmaceutical companies or retailers';
- Only 7% believe 'British banks have learnt their lessons from the financial crisis of 2008';

Customers don't think banks are fair: just 11% think 'high street banks treat their customers fairly', while 79% say 'when it comes to the current economic problems, we are supposed to 'all be in this together', but UK banks don't think that includes them'.

Focus groups do find some sympathy for bankers, believing they have become scapegoats for politicians, and that not every failure of the financial system should be laid at their door, but most feel they were complicit and greedily played the system, describing the sector as "corrupt", "arrogant", "untrustworthy" and "self-serving".

For MPs, these concerns go beyond the financial sector, with 42% saying CEOs of large British businesses are underperforming, while only 15% disagree. 90% of MPs want shareholders to have greater capacity to scrutinise large UK businesses.

Quotes from UK bank customers:

*"Stop these obscene bonuses."*

*"Stop being meretricious, pretending that customers come first. They obviously don't."*

*"They need to act responsibly and not encourage the chasing of a quick profit e.g bonuses for selling the most products whether it is suitable for the customer or not."*

*"Banks should provide a safe and secure place to deposit money and they should invest that money ethically and they should make adequate funds available to lend to profit-making enterprises."*

*"Not everything is the banks fault. The last government managed to crash the economy into the ground without them."*

## Switching

12% of customers polled in August 2012 are considering moving their main current account to another provider, and it is highest amongst customers at RBS (NatWest/Ulster/RBS) (17%), Barclays (15%), Santander (14%) and HSBC (14%). 35% of those thinking of switching are considering The Co-operative Bank, coming top for RBS, Barclays and Lloyds customers. Nationwide comes second with 17%.

Many RBS and Barclays customers are displeased with their bank but few intend to genuinely move accounts due either to laziness or because of how hard they think it will be, with some worrying it might affect their credit rating. There is also a lot of concern that all the banks are simply as bad as each other. There is, however, some call for portable account numbers that they hope will make the process easier.

*"As a Barclays customer, I'd like to say I changed my bank, but I haven't (yet), why not ? Hassle and I figure many have similar skeletons in their closets."* UK bank customer

Recent YouGov SixthSense research amongst SMEs in the UK (SME Banking Report) similarly finds concerns about how hard it might be to switch to another provider, despite their desire to do so, and very few of those who have switched say the process was easy and painless.

Fear of being charged for their current account is the one factor that respondents in focus groups think might actually motivate them to move.

## Repairing Bank Reputations

*"It's easy to bash them but the UK needs them if we're ever going to get out of the pickle we're in."*  
UK bank customer

The UK public as a whole is not positive about banks but it does not want to turn its back on them, with 78% believing 'Banks are critical to getting the UK economy growing again'. This opportunity for banks to show their worth and perhaps repair some reputational damage comes at a price, because 83% say that 'It is essential to the future of Britain's economy that British banks undergo major reform' with 55% supporting a split of investment and retail operations, while 12% oppose it.

Quotes from UK bank customers:

*"Separate high street banking from other financial activities. Be transparent and honest. Have a fair pay/bonus system not based on short-term interests."*

*"I think there needs to be regulation though - Banks won't do this on their own."*

*"...we have also seen the FSA cannot be trusted to do this either"*

YouGov's analytical team ran a 'key drivers' analysis to compare scores given for the reputational attitudes with scores for overall 'favourability'. This shows that favourability is most impacted by perceptions around being 'trustworthy' and being 'a company I'd be proud to work for'. This gives some idea of what banks need to do while the table below shows the factors people believe actually build trust in a financial brand:

**Figure 6: Top 6 factors that build trust in a financial brand**

Behaving fairly and transparently with their customers	62%
Good opinion given by friends and family	56%
Knowing there is no risk of them going out of business	56%
Offering consistent high-quality customer service	53%
Rewarding loyalty	45%
Only selling me things I need	45%

Source: YouGov SixthSense 'Trust in Financial Services' April 2012. Sample size: 2,060 representative UK adults aged 18+

Echoing Stephen Hester's comments about being "detached from society", this report demonstrates that perhaps it is those banking brands which are most in tune with customers or society at large that are enjoying the strongest reputations. Whether this is due to ownership structure or not, there are clear reputational pointers from other financial providers that the big four high street banks cannot ignore.

*"[If] acting in the interests of the country...they would be transparent, open, fair, responsible and honest"* UK bank customer



## Part III: The Reputation of Political Parties

### Case Study: No Trust, No Empathy, No Sympathy: The Brand of British Party Politics

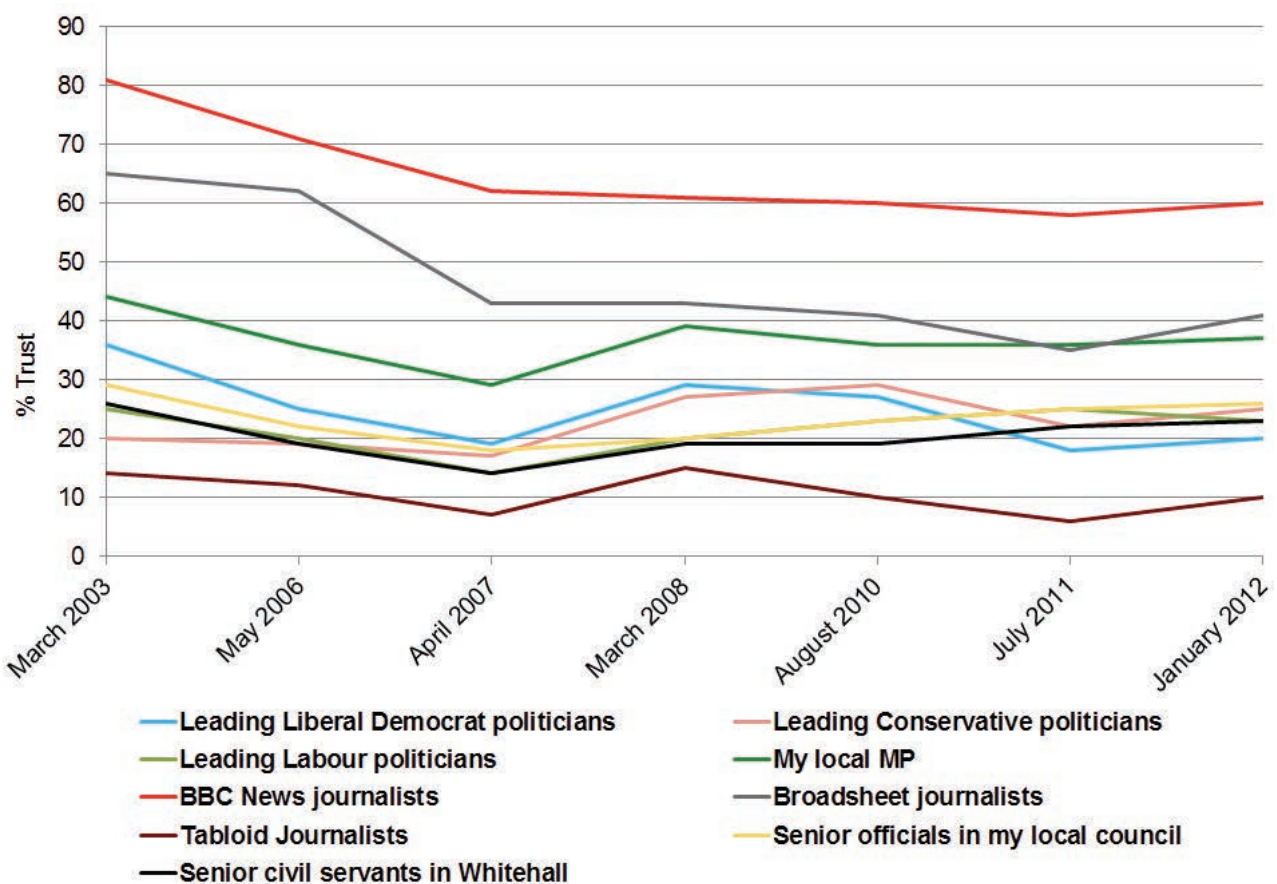
By Joe Twyman (Director, Social and Political Research, YouGov)

In Britain, national party politics is a brand in crisis. Once those that walked the halls of Westminster would expect not just support but respect and reverence from voters, but nowadays anyone holding such expectations would be dismissed as naïve at best.

Put simply, the problem that the brand of British party politics faces is two-fold: Firstly, only a small proportion of the population trusts them and, secondly, only a small proportion of the public shares their view of how they see themselves.

One look at YouGov's data on public trust illustrates the first point perfectly. Only a quarter of British adults believe that leading Conservative politicians can be trusted either a great deal or even a fair amount. For leading Labour politicians the figure is slightly worse at 23%, and it drops as low as one in five for their Lib Dem equivalents.

Figure 1: Whom do the public trust?



Source: YouGov Social and Political Polling, Trust tracker

Those outside the main political parties, but still under the brand and within the machinery of British politics, fare no better. Senior civil servants in Whitehall attract only 23% trust, while senior officials in respondent's local council manage to get up to 26%. Among the range of professions included in YouGov's trust questions only estate agents, journalists, and senior officials in the European Union are viewed less favourably.

Of particular interest is the fact that, though the data shows fluctuations along the way, levels of trust for British politicians have been this consistently low across nearly a decade of polling YouGov has conducted on this subject. While politicians, prime ministers and governments have changed, trust has remained worryingly low. Even the expenses scandal, which came to light in May 2009, seems to have not had a significant effect – essentially politicians could not lose trust they did not have in the first place.

Adding to this more general problem of a lack of trust is the more specific issue of a disconnect between British politicians and the general public over certain aspects of their role.

Recently the Conservative MP for Corby, Louise Mensch, resigned, claiming that she personally could no longer balance her family life with her political commitments as a high-profile MP. This ignited a debate on the working lives of our elected representatives, resulting in a chorus of MPs from across the political spectrum confirming similar difficulties.

Nigel Evans MP described the role of an MP as “24 hours, or as long as you are awake,” while Labour MP Dame Anne Begg explained that there was no such thing as a 'typical' week. Labour MP Stella Creasy was also keen to highlight that Mensch's resignation wasn't a gender issue, saying “For a lot of my male colleagues I'm very conscious they have to make some tough choices about how they spend time with their children. It's equally important to them as some of the women. None of this is about gender, it's about family.”

However, a survey by YouGov on the subject found that over half of British adults (58%) believed it was possible to “lead a normal family life at the same time as doing a good job as a Member of Parliament” with less than a third (31%) believing it was not possible. Similarly, 43% believed that MPs' working hours were not long enough, while only 8% felt they were too long.

**Figure 2: MPs: Having it all?**

<b>They get paid too much, too little, or about the right amount?</b>		
Paid too much	Paid about the right amount	Paid too little
60%	28%	5%
<b>Have to work hours that are too long, not long enough or about the right amount?</b>		
Work hours that are too long	Work about the right amount	Work hours that are not long enough
8%	31%	43%
<b>Do you think somebody with a partner and children could or could not do a good job as a Member of Parliament at the same time as living a normal family life?</b>		
Could lead a normal family life	Could NOT lead a normal family life	
58%	31%	

Source: YouGov Social and Political Polling, 7th-8th August 2012. 1715 representative UK adults aged 18+.

The amount MPs are paid illustrates the disconnect further. Recently, former Labour spin doctor Alistair Campbell became the latest in a long line from within the brand to call for an increase in MPs' salaries in recognition of the important role they play in society, and also as a way to attract more of the "best and brightest" into politics.

An MP's basic salary of £65,738 a year is still some way behind the equivalent of around £105,000 for a US congressman, the £215,000 for a Japanese MP or £101,000 for an Italian MP. In contrast, it is well ahead of the £29,000 in Spain, £43,000 in Sweden and £44,000 in Norway – ranking roughly midway when held up to international comparison among countries in the developed world.

However, the BBC estimates that an MP's salary is higher than 96% of the British population – and it is perhaps this statistic, more than any other, that explains why three out of five British adults believes their MPs are paid too much. Just one in twenty shares the contrasting view of Alistair Campbell (and many others), that MPs are paid too little.

And while 45% don't know how the salary of British MPs compares to other countries, 31% believe they get paid more than in most other countries.

It is inevitable that questions over MPs' working hours, conditions and salaries will persist, along with a multitude of other debates. However, if the disconnect with the public is to stand any chance of closing, the brand of British party politics has to first address the more fundamental problem of a lack of trust. Without addressing that, sympathy and empathy are unlikely.

# The Future of Research is Beautiful Data

**Stephan Shakespeare,**  
Chief Executive and Co-founder of  
YouGov, and Chairman of the  
government's Data Strategy Board,  
assesses the value of networked  
longitudinal market research



Five years from now, the typical research commissioned today by the typical research department will be remembered with embarrassment as clunky, dim-witted and far too expensive. The smartest are already saying it. One-dimensional studies micro-sliced into 50 PowerPoint slides? Absurd!

People are connected, dynamic, subject to a multitude of simultaneous influences; they are forever toying with their loyalties, and continuously expressing themselves to their friends and to the wider world. "If you don't like change, you'll like irrelevance a whole lot less," says Joe Tripoli, chief marketing officer of Coca-Cola, but that will sound mild: the old fashioned nostrums of today will be dismissed as mere quackery.

YouGov was the first to do accurate, reliable market research online. We're still the only ones who constantly – and publicly – test and prove our accuracy. But accuracy is only the beginning of the story. What really matters for today's reputation manager is continuous, connected, multi-layer data that helps you understand attitudes and changing markets in their dynamic totality. And you can only get that from high-quality, high-response representative panels engaged in a structured, networked programme of longitudinal research.

Quarterly studies? No way: too slow, too superficial. You need to follow your customers, and your potential customers, and all those who continuously co-create your reputation, in all dimensions and every single day because you never know when an opportunity or a threat will rear up in front of you. If something happens to your brand today, will you know what to do about it right away? Or in a week? Or a month?

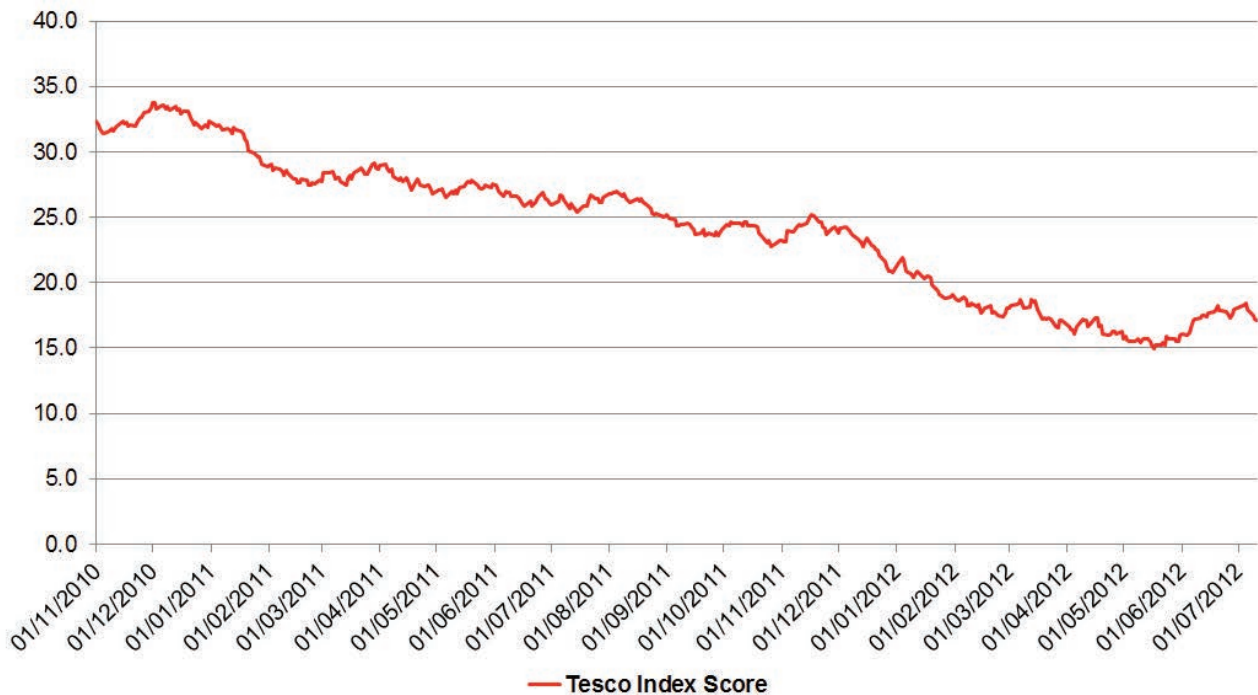
And here's the punchline: the best research methodology is also cheaper than what you have right now. In-depth, robust, continuous monitoring of change, reported to you in a dynamic – indeed beautiful – dashboard, actually costs less than those clunky, dim-witted annual studies.

Now look at the graph: that's the BrandIndex amalgamated image score for Tesco, (it looks a lot worse if you only look at the "value" component). It's just a line, but all the people who gave their views to make that line are intimately known to us. Our integrated database has at least a thousand things about each of those hundred thousand people. We know their media channels, their full demographics, their attitudes and viewing and buying behaviour, and a whole host of likes and dislikes. Many of them allow us into their personal Facebook pages to see everything they see, and to follow them on Twitter where we analyse every brand message they receive and, test its daily effect.

And if they change their attitude to a brand, we can spot that and reinterview them immediately to find out exactly why they've changed, and – for any marketer this is crucial – what exactly can be

done about it. Those people who moved from positive to negative about Tesco, maybe just 3 per cent – and we could target them forensically – would tell us exactly why, and long before it was too late.

By the way, the Tesco share price dived a full year after the BrandIndex first dipped. The markets didn't see it coming, nor did Tesco, but I wrote in my CityAM column before Christmas: "For Tesco, dropping behind Morrisons and Asda on value, while also losing ground in other areas presents a problem. Could the sheen have come off the company that has dominated the UK grocery market over the past decade?"



*YouGov BrandIndex tracking of Tesco*

Fellow market researchers tell me: "People don't like data, they want stories." Maybe some of them do prefer sad stories of the decline of great companies, but my bet is they would prefer to see what's coming and change it before it's too late.

Continuous monitoring, combined with triggered in-depth interviews, to understand the drivers of change, using extensive long-tail profiling, systematic longitudinal surveys, (BrandIndex runs fresh with a new panel every day), and tracking social media specifically through your actual identified customer and stakeholder types – this is the new data-driven, profile-enhanced, leading-edge research methodology that allows you to manage your brand effectively. And, of course, those one-off studies can now be conducted in the context of all that detailed background.

I said it was cheaper too. Because it is semi-automated and uses the richness and efficiency of a large, engaged, pre-profiled panel, getting the fastest, deepest and largest quantity of insight-loaded data actually requires a smaller budget than the old-fashioned techniques that still make up the majority of the research industry.

This month we are loading up the next phase of profiling our panel. If you want to find out more about getting your brand included in the database, drop me an email right now at [stephan@yougov.com](mailto:stephan@yougov.com)

# We know them inside out



**54%** of Brits prefer writing with black ink rather than blue ink\*

**29%** of the British population chew on the end of their pen\*

**47%** of Brits prefer typing to writing with a pen\*

**33%** of Brits bought stationery, in-store or online from a major supermarket in a six month period\*\*

**57%** of Brits have stained themselves or their clothes with pen ink after not putting the lid back on the pen properly\*

If you want to avoid chewing your favourite pen in anxiety, speak to us about your research challenges.

Whatever the question, as the pioneers of online research, YouGov has the answer. With access to 2.5 million respondents worldwide using innovative research tools, market intelligence reports and bespoke consultancy, you're sure to find the insights you need.

\*Statistic from a nationally representative YouGov Omnibus survey conducted online. Fieldwork: 3 – 5 January 2012, sample size: 2028 British adults aged 18+. \*\*Statistic taken from the YouGov SixthSense Specialist Non-food Retailing Report. Nationally representative YouGov survey conducted online. Fieldwork: 14 – 16 July 2010, sample size: 2199 UK adults aged 16+.

**T** +44 (0)20 7012 6000  
**E** [info@yougov.co.uk](mailto:info@yougov.co.uk)  
**W** [yougov.co.uk](http://yougov.co.uk)

**YouGov**<sup>®</sup>  
What the world thinks



# YouGov®-Cambridge

What the world thinks... And the experts say

---

**T** +44 (0)20 7012 6000

**E** [info@yougov-cambridge.com](mailto:info@yougov-cambridge.com)

**W** [yougov.com/cambridge](http://yougov.com/cambridge)