



SPEAKING TO THE INNOVATION POPULATION



ACKNOWLEDGEMENTS

Nesta

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ComRes is a leading market and opinion research consultancy providing data-driven insight into corporate reputation, public policy and communications. ComRes is a founding member of the British Polling Council, and published pollster for the BBC, ITV News, CNN and *The Independent*. Its coverage includes public and elite audiences across all sectors in all global markets.

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FOREWORD

SPEAKING TO THE INNOVATION POPULATION

Who cares about innovation? The answer, it turns out, depends on two other questions: what sort of innovation you're talking about, and to what end.

To our knowledge, there has been little research on public opinions about either innovation or government policy on innovation, either in the UK or elsewhere.

We know that in other fields – such as science – regular surveys help inform public debate and policymaking. So Nesta worked with ComRes to carry out a large-scale quantitative and qualitative survey of the attitudes of people around Britain to innovation and innovation policy.

The results are striking. They show that there is indeed a group of people in the UK who are enthusiastic about innovation and new technologies for their own sake. However, this group is relatively small – one in five people – and disproportionately affluent and male.

However, this is not to say that the bulk of population are technophobes or luddites. Two-thirds of the population clustered into three segments who were enthusiastic about technology, as long as its benefits, especially in social terms, could be clearly articulated. The research also showed these groups had clear questions about the downsides of innovation, such as the impact of the internet on social life, or the environmental impact of our superabundance of gadgets.

The research also identified around one in six people – who were much more concerned than enthusiastic about innovation. They were disproportionately female and less affluent, and feared for the impact of technology on their wellbeing and on society.

We believe this research is important for two reasons:

Firstly, it can help inform the debate about the impacts of innovation, and who benefits, by providing some quantitative information about people's attitudes and preferences.

Secondly, it carries a message for policymakers that generally goes unheard. For decades, innovation policy has been the domain of technocrats and of party-political consensus.

This has delivered some important benefits, such as the maintenance of a relatively good spending settlement for scientific research over two governments and the establishment of bodies like the Technology Strategy Board.

But the flipside of technocratic consensus is that innovation has never been high on the party political agenda. To the extent that British politicians talk about innovation, they almost always talk to that small group who hold innovation to be self-evidently worthwhile. It is not part of any national narrative in the way that education, healthcare or even transport have been. In a democracy, this carries the risk that while innovation funding will be safe from partisan point-scoring, it will never be in line for the significant funding that more popular policy areas receive.

An implication for this research for those who believe that the government should fund more innovation is that politicians need to start talking about innovation to bigger audiences, not just the one in five who are innovation enthusiasts. And that to do so, they need to talk not just about innovation for its own sake, but about the benefits that it brings for consumer, for society and even the world.

As usual, we welcome your feedback.

Stian Westlake
Executive Director, Policy & Research

INTRODUCTION

Public attitudes towards innovation are as broad and multifaceted as the concept itself: few people completely support or oppose ‘innovation’ as a whole, and individual attitudes are often replete with apparent contradictions. Indeed, as a policy issue, intangible investment rarely sets pulses racing. While this lack of emotive potential can work to the advantage of those supporting high levels of investment in innovation, by protecting policymakers from the tabloid headlines that often undermine other initiatives, it can also make it hard to inspire public support.

Although our research reveals significant differences in attitudinal tendencies between men and women, between more and less affluent people, and among supporters of different political parties, there are many exceptions to every rule. Generalising on this basis will alienate the large number of people whose views on innovation are atypical of their demographic. Traditional assumptions about young people driving innovation and older people struggling to adapt are not always supported by the data, and do not correlate with attitudes towards serious innovation policy concerns. Instead, those promoting innovation should perhaps begin by considering how innovation relates to the other narratives playing out in the media and public discourse.

SOCIAL INNOVATION AND WELLBEING

Every stage of the research showed that people most valued innovation in areas that had a demonstrable impact on health, wellbeing and quality of life. The majority (56 per cent) of the British public think that ‘improving quality of life’ is the most important benefit that new ideas and technologies should bring to society. (see p.10)

People seek reassurance that they and their children will have the necessary skills to find good jobs, and will be able to enjoy a good quality of life into old age. Innovation fits comfortably into this narrative, through advances and breakthroughs in **health** (e.g. keyhole surgery), **education** (e.g. a 21st century curriculum), **sustainable energy** and **housing**.

KEYHOLE SURGERY: WHY IS IT A GREAT INNOVATION STORY?

Innovation needs to be illustrated with stories, not concepts. Some stories are particularly effective because they neatly encompass many different concerns and priorities in a widely understood and appreciated way.

Keyhole surgery works because:

- Healthcare matters to everyone – 93 per cent of people believe it is important for the future of the human race that we continue to innovate in healthcare. (see p.16) Improving quality of life is seen as the most important benefit new ideas and technologies should bring to society.
- Keyhole surgery uses technological advances – like fibre optics and high-definition (HD) television – to deliver undisputed societal benefits. People overwhelmingly regard keyhole surgery as beneficial, with 86 per cent saying it will have a positive effect on society. (This rises to 94 per cent among over 55s, a demographic that is of high electoral importance). (See: Nesta’s *Innovation Population: The UK’s views on Innovation*.)
- People are relatively familiar with keyhole surgery, particularly the key 55+ audience, two thirds (67 per cent) of whom are familiar with it. (See: Nesta’s *Innovation Population: The UK’s views on Innovation*.) When discussed in focus groups, people tend to swap anecdotes about it – a classic sign of a story that resonates.
- Keyhole surgery has none of the drawbacks people most fear about technological progress: losing jobs to technology (chosen by 41 per cent), throwing things away too often (32 per cent), and loss of social skills (32 per cent). (see p.12)

- It shows the importance of investment in education, requiring highly skilled and trained surgeons to perform it. University education is seen as one of Britain's biggest strengths, with 41 per cent saying our university education is stronger than rival countries, compared with less than a third (32 per cent) saying it is weaker. (see p.21)
- It is delivered through a major government institution (the NHS) and requires updated government regulation to manage its implementation. Government's role is seen as planning for the future and helping society adapt to change. Investment in and regulation of healthcare and education are key components of this.
- Its impact on outcomes can be quantified with meaningful, easily understood statistics – shorter hospital stays, faster recovery time, fewer complications.
- The underlying technological advances have all involved significant British involvement – whether it be John Tyndall's early proof that a light signal could be bent through a material, John Logie Baird's invention of the television, or John Hunter's development of modern surgery.

When asked specifically how innovation could most bring benefits in healthcare, most people (58 per cent) choose **earlier detection and prevention of medical conditions**, and this rises to 75 per cent among over 65s. The narrative around dealing with an ageing population is less popular, chosen as a key benefit of innovation by only a quarter (25 per cent) of the population. (see p.16)

TECHNOLOGY AND SOCIETY

Innovation at the consumer level is often seen to make life **easier, faster, and more convenient**, but is not without its **drawbacks**. In the social sphere, parents worry about the **desocialisation** of children glued to screens and able to access an anarchic online world that older generations struggle to comprehend. In the workplace, employees are expected to **deliver more for less**, as technology automates tasks once carried out by people, and increases the speed and reach of communications. Government can play a role in softening the impact of these effects, by adapting to changing technologies and social norms itself, as well as helping the population to adjust.

Many people are concerned about our culture of **disposability**, with modern technologies too complex and cheap to warrant repair when they break. A third of people (32 per cent) say that **throwing things away too often** is a main drawback of new ideas and technologies in British society. (see p.12) One class of consumer innovations that attracts almost universal acclaim is those **incremental innovations** that minimise the impact of existing technologies – e.g. fuel-efficient cars, noiseless hairdryers, see-through toasters.

INCREMENTAL VS RADICAL:

People have the capacity to imagine incremental innovations before they happen: making things quieter, smaller, faster, sleeker, cheaper or more efficient. **You can talk about incremental innovations before they happen** without losing your audience. The anchoring effect¹ means that people can compare *life with the current version* and *life with a better version*, and are able to reach a value judgment.

On the other hand, being asked to imagine the future curve of **radical innovation triggers a kind of cognitive dissonance**. It means comparing *life without* and *life with*, an impossible mental leap if only one of those states has been fully experienced. It needs to be illustrated with **recent, retrospective** examples like the World Wide Web – the majority of the adult population being able to contrast the pre-internet and post-internet ages, and 88 per cent see the World Wide Web's effect on society as positive. (see p.43)

Early-stage radical innovations, like 3D printing, do excite those sections of the population which are more engaged and more relaxed about the pace of change. The prospect of 3D printing revolutionising heart surgery² has cut through among engaged audiences, and may be an appealing way of introducing radical innovation into communications.

Sustainability and the **environment** are important, with a quarter (23 per cent) of respondents viewing environmental damage a main drawback of new ideas and technologies, but these topics need to be addressed carefully. (see p.12) The idea of **diminishing resources** is more widely accepted than **environmental damage**, and can be used to support a wider range of popular objectives – energy, food, and housing. Specific energy solutions – like nuclear energy or wind farms – divide opinion. The public’s priorities in energy usage are renewable energy sources (65 per cent selecting as an important way new ideas and technologies can bring improvements) and more efficient use of existing energy resources (62 per cent). (see p.17)

ENTERPRISE AND RISK

The TV programme *Dragons’ Den* has exposed the public to the concept of investment as calculated risk, and to the fact that investment means not just **funding**, but also **knowledge**, **experience**, and an element of **luck**. The image of the inventor as an eccentric boffin has given way to a more mainstream acceptance of the **enterprise** demonstrated by people like **James Dyson**. These stories can be used to make innovation much more accessible to a general audience.

Attitudes towards the **pace of change** and **risk** are diffuse. Change is seen to be too slow in some areas and too fast in others:

| Too slow | Too fast |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> • Cures for common diseases • Affordable housing • Education reform • Medical progress | <ul style="list-style-type: none"> • Communications technology, especially among children • Workplace (particularly among older people) |

Risks can likewise be categorised into acceptable risks (those where the potential negative consequences are understood by the parties involved, or where there is a pressing need for a solution) and unacceptable risks (those that draw people into potential outcomes they have not had the chance to challenge):

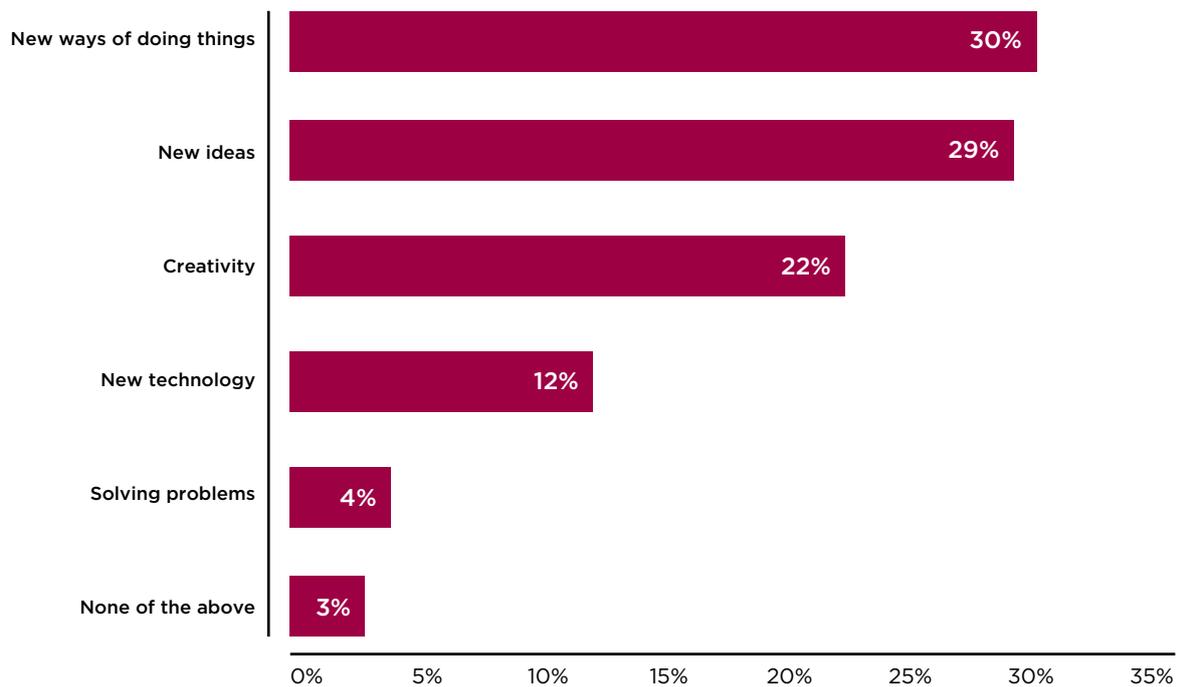
| Acceptable risk | Unacceptable risk |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> • Investing in small businesses • Where the need for innovation outweighs the assessed risk • Those taken by individual entrepreneurs or businesses rather than those which might adversely affected individuals | <ul style="list-style-type: none"> • Not testing/regulating medical advances • Invading people’s privacy • Pursuing profit over public good |

PUBLIC UNDERSTANDING OF INNOVATION

The following pages show detailed findings for the final message testing survey of 2,077 UK adults, with commentary on significant differences between different demographic groups.

DEFINING INNOVATION

Q. Which of the following descriptions, if any, best matches the word 'innovation'?

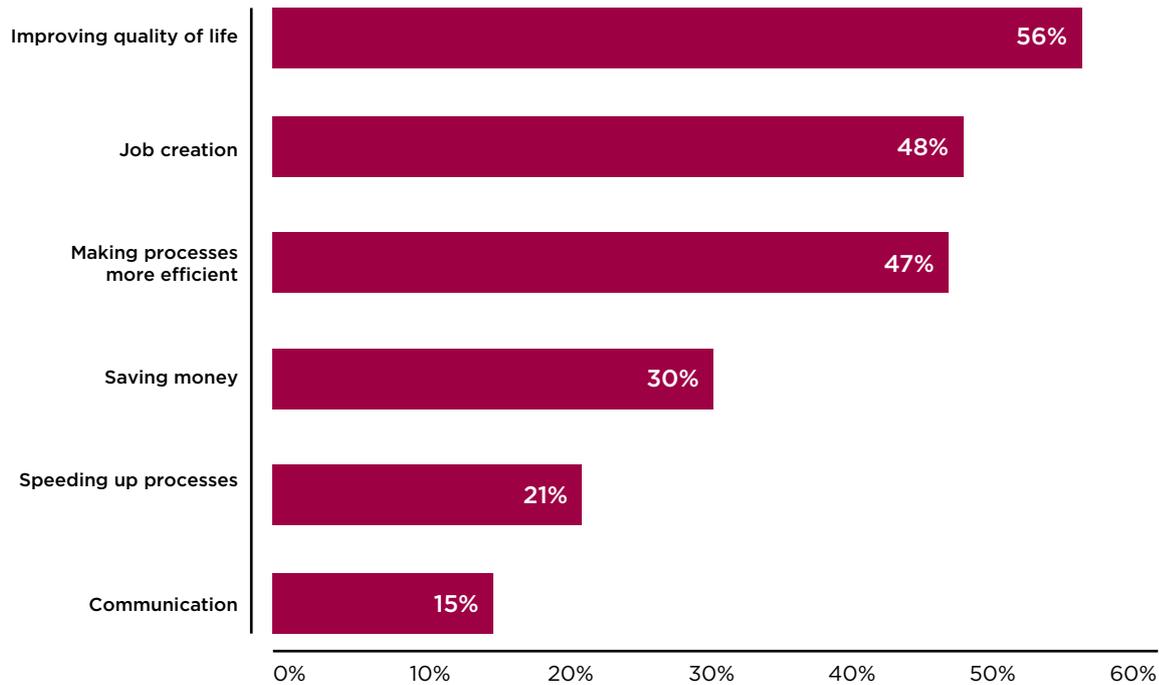


(Base: Total n = 2,077)

Innovation is seen as **new ways of doing things** (30 per cent) and **new ideas** (29 per cent), with **creativity** (22 per cent) also chosen by a significant proportion of the population. Only 12 per cent believe innovation equates to new technology.

GOALS AND BENEFITS OF INNOVATION

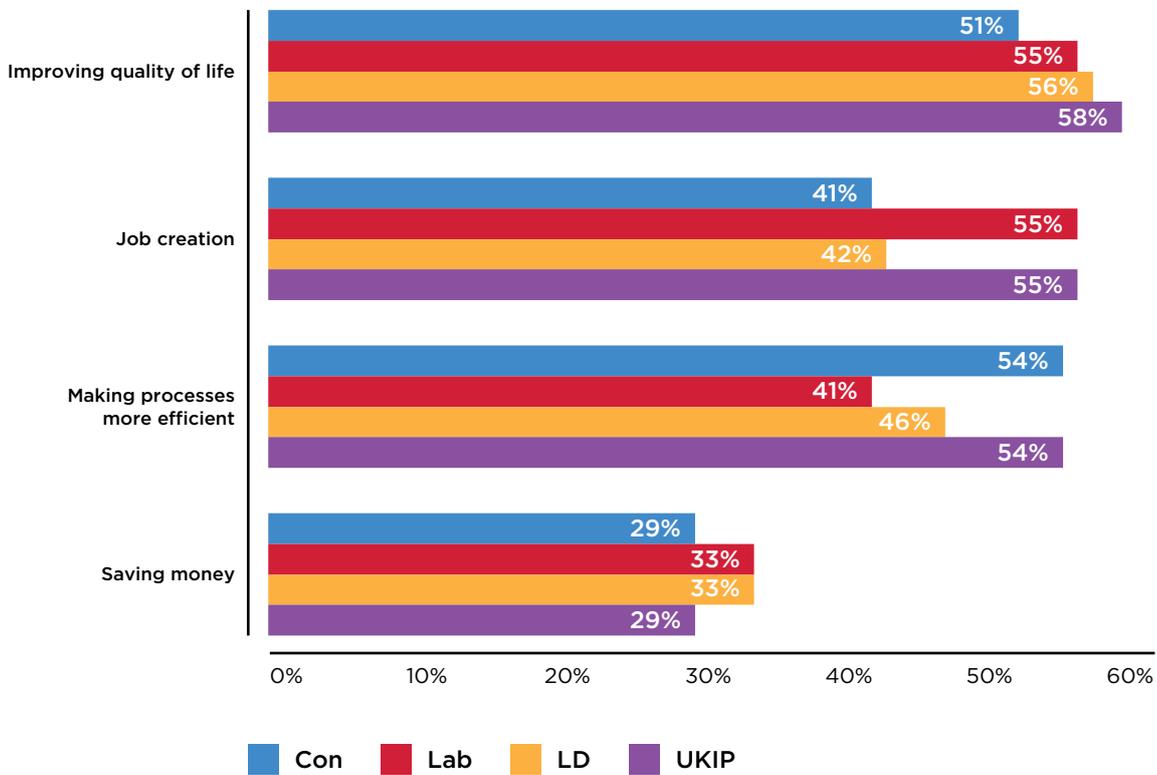
Q. Which of the following benefits, if any, is it most important for new ideas and technologies to bring to society? Please select up to three.



(Base: Total n = 2,077)

Improving quality of life (56 per cent) is most widely chosen as an important benefit that new ideas and technologies should bring to society, followed by **job creation** (48 per cent) and **making processes more efficient** (47 per cent). There are significant party political differences on job creation (Labour and UKIP voters more likely to select it) and making processes more efficient (Conservative and UKIP voters more likely to select it):

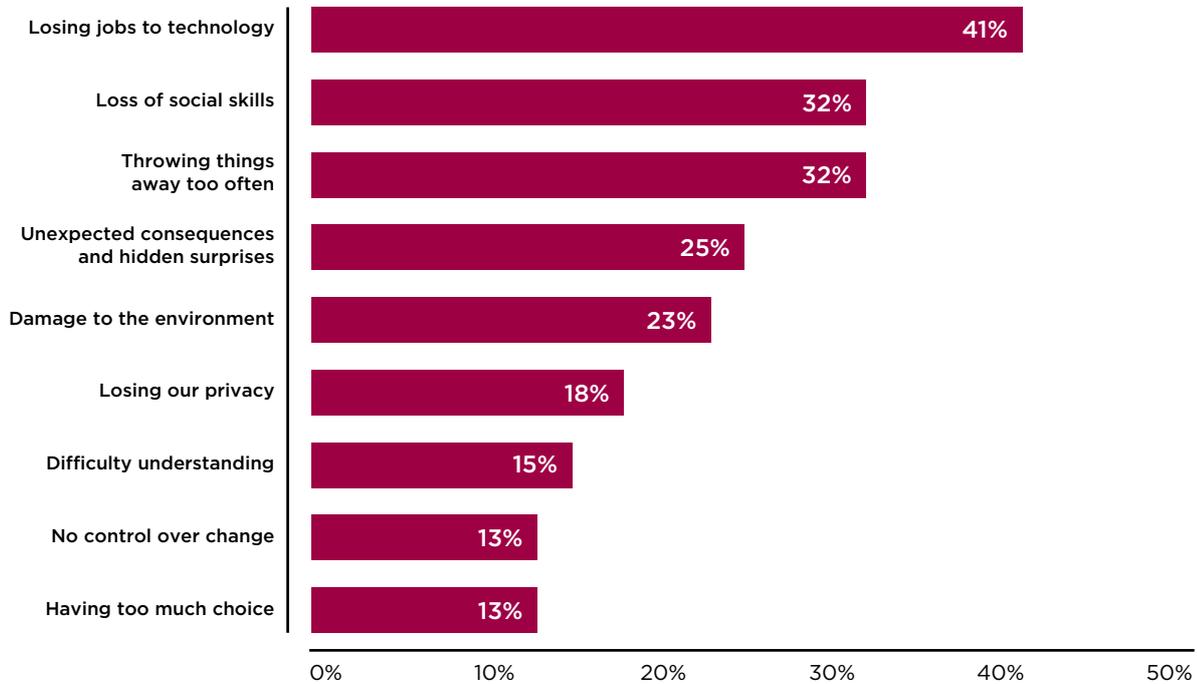
Q. Which of the following benefits, if any, is it most important for new ideas and technologies to bring to society? Please select up to three.



(Bases: Con n = 492; Lab n = 582; LD n = 152; UKIP n = 221)

DRAWBACKS AND RISKS

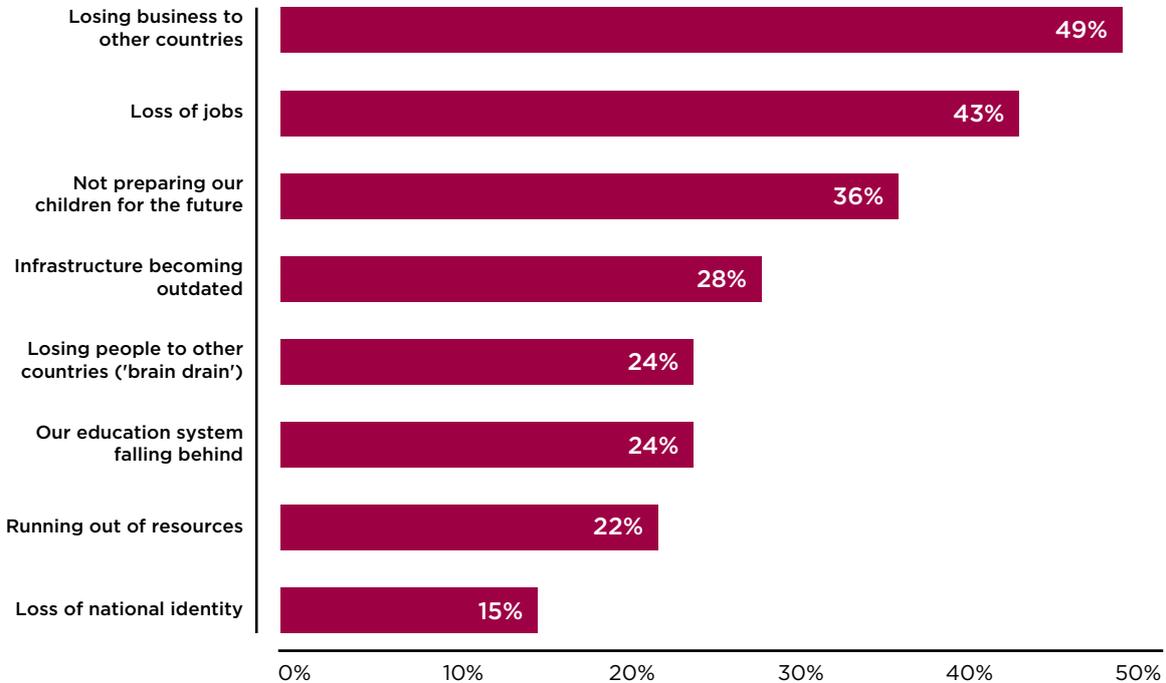
Q. Which of the following are the main drawbacks of new ideas and technologies in British society? Please select up to three.



(Base: Total n = 2,077)

The main drawbacks of new ideas and technologies in British society are perceived to be **losing jobs to technology** (41 per cent), **loss of social skills** (32 per cent), and **throwing things away too often** (32 per cent). This reflects the findings from the qualitative focus groups – with these concerns particularly prominent in discussions with the **INNOVATION SCEPTICS** and **INNOVATION REALISTS** segments. (See pages 35-40.)

Q. If Britain failed to innovate, which of the following consequences would you be most concerned about? Please select up to three.



(Base: Total n = 2,077)

Age: 18-34 n = 596; 35-54 n = 678; 55+ n = 803.

Gender: Male n = 1,035; Female n = 1,042.

Voting intention: Con n = 492; Lab n = 582; LD n = 152; UKIP n = 221

The biggest risks of failing to innovate are perceived to be **losing business to other countries** (49 per cent), **loss of jobs** (43 per cent), and **not preparing our children for the future** (36 per cent). Losing business to other countries resonates particularly strongly with over 55s (62 per cent), UKIP voters (57 per cent) and Conservative voters (53 per cent).

Loss of jobs resonates most strongly with younger people (46 per cent of under 55s), Labour voters (48 per cent) and UKIP voters (48 per cent).

Not preparing our children for the future is a particular fear for older people (43 per cent of over 55s) and women (40 per cent versus 32 per cent of men).

INNOVATION PRIORITIES

Q. In which of the following areas, if any, would you be interested in hearing about *new ideas and innovations*? Please select all that apply.

| | Area | % interested | Key audiences (% positive) |
|-----|-----------------------------|--------------|-------------------------------------------------|
| 1. | Medicine/healthcare | 72% | Age 55+ (83%) |
| 2. | Science and technology | 59% | Men (68%) |
| 3. | Food | 46% | - |
| 4. | Education | 43% | Public sector (52%), Labour (48%) |
| 5. | Neuroscience and psychology | 40% | - |
| 6. | Social care | 38% | Women (49%), Age 55+ (48%), Labour (45%) |
| 7. | Vehicles and transport | 37% | Men (48%) |
| 8. | Household goods | 36% | Women (41%) |
| 9. | Engineering | 36% | Men (50%), Age 55+ (46%) |
| 10. | Communications | 35% | Men (42%), Social grade AB (42%) |
| 11. | Politics and economics | 22% | Social grade AB (28%), Age 55+ (27%) |
| 12. | The Arts | 21% | London (26%), Social grade ABC1 (25%) |
| 13. | Sport | 19% | Men (29%) |
| 14. | Architecture | 19% | London (23%) |
| 15. | Business and management | 14% | Social grade AB (21%), London (19%) |
| 16. | Cosmetics | 11% | Women (20%), Age 18-24 (18%) |

Base: Total (4,121)

The natural association between innovation and everyday life is clearly strongest in **medicine** and **science and technology**. Innovation in areas like **education** (public sector workers and Labour voters) and **social care** (older people, women, and Labour voters) tends to be of interest to specific audiences.

Q. How important or unimportant is it for the future of the human race that we continue to innovate in the following areas?

| | Area | % interested | Mean score* | Key audiences (% positive) |
|----|-------------------|--------------|-------------|------------------------------------------|
| 1. | Healthcare | 93% | 6.21 | Age 55+ (96%) |
| 2. | Energy | 87% | 5.92 | Age 55+ (91%), Conservative (90%) |
| 3. | Agriculture | 83% | 5.66 | Conservative (89%) |
| 4. | Education | 82% | 5.66 | Women (86%), Public sector (86%) |
| 5. | Communications | 67% | 5.04 | London (74%), Men (71%) |
| 6. | Public transport | 59% | 4.74 | London (71%) |
| 7. | Military/defence | 50% | 4.42 | Conservative (61%), UKIP (58%) |
| 8. | Space exploration | 34% | 3.64 | London (47%), Age 18-34 (46%) |

Base: Total (4,121)

* 1-7 scale, where 1 = lowest importance and 7 = highest importance

Healthcare is again the area of principal importance to the general public, with almost universal agreement that innovations in healthcare, such as new medicines and medical technologies are important to the future prospects of humanity.

Conservative voters are more likely to believe **energy** (e.g. sustainable energy sources, energy efficiency), **agriculture** (e.g. pest-resistant crops, farming techniques), and **military/defence** (e.g. weapons, missiles, aircraft) are critical innovations.

Q. For each of the following innovations, do you think they will have a mainly positive or mainly negative effect on the quality of life of current and future generations?

| | Innovation | % interested | Mean score* | Key audiences (% positive) |
|----|--------------------------|--------------|-------------|----------------------------------------------------------|
| 1. | Human stem cell research | 71% | 5.27 | Conservative (77%), Age 55+ (76%), Social grade AB (76%) |
| 2. | Bionics | 61% | 4.84 | London (70%), Men (65%) |
| 3. | Online shopping | 57% | 4.81 | London (65%), Age 18–34 (63%) |
| 4. | Smartphones | 52% | 4.58 | Age 18–34 (66%), London (64%) |
| 5. | Nuclear energy | 47% | 4.37 | Conservative (61%), Men (59%), Age 55+ (57%) |
| 6. | Robots | 39% | 4.10 | London (52%), Men (48%) |
| 7. | Space exploration | 37% | 4.04 | London (51%), Age 18–34 (48%) |
| 8. | GM foods | 33% | 3.81 | Men (43%) |

Base: Total (4,121)

* 1–7 scale, where 1 = completely negative and 7 = completely positive

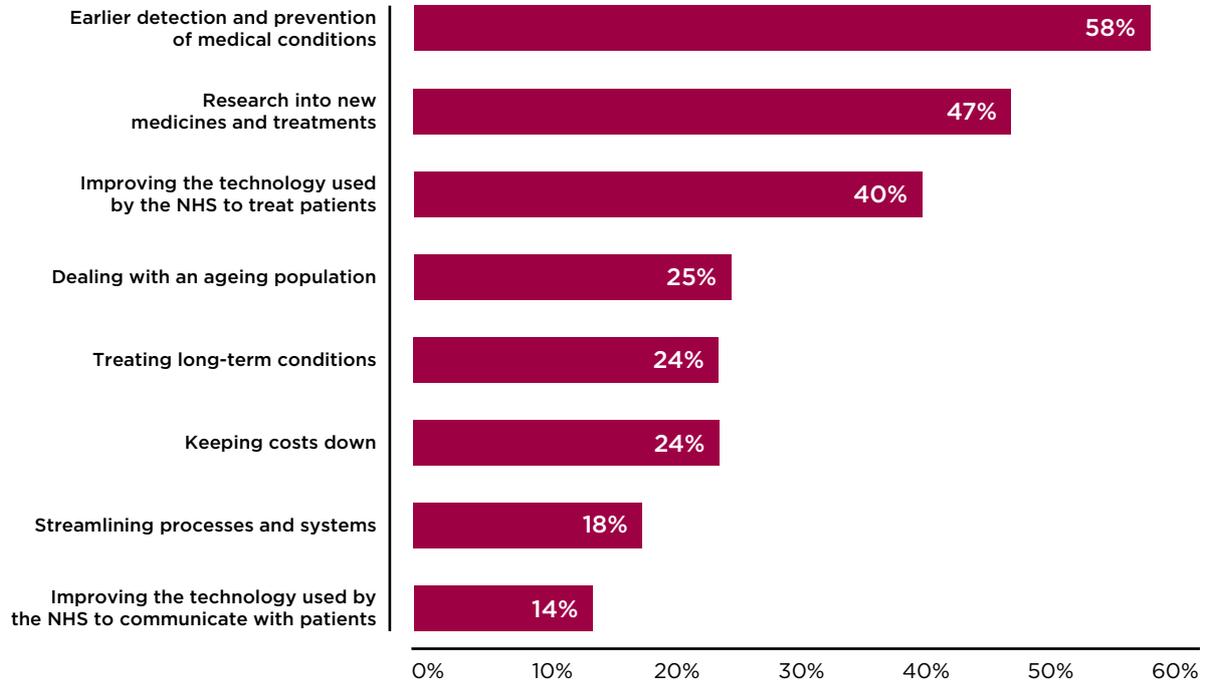
Strong patterns emerge when people are asked to think about specific innovations. Men, London residents and younger people (aged 18–34) tend to have positive views towards everyday technological innovations (**online shopping** and **smartphones**), as well as **space exploration**.

Human stem cell research is generally well regarded, particularly among older, more affluent and Conservative-voting audiences. A similar demographic profile emerges for **nuclear energy**, with a clear majority of Conservative voters (61 per cent) backing it, compared with a minority (47 per cent) of the general population.

Healthcare, education and **energy** are key areas in which the public felt innovation could bring socio-economic benefits. Respondents were asked in more detail what this might mean in terms of policy objectives.

HEALTHCARE

Q. In which of the following ways, if any, can new ideas and technologies most improve healthcare in Britain? Please select up to three.



(Base: Total n = 2,077)

Age: 18-34 n = 596; 35-54 n = 678; 55+ n = 803.

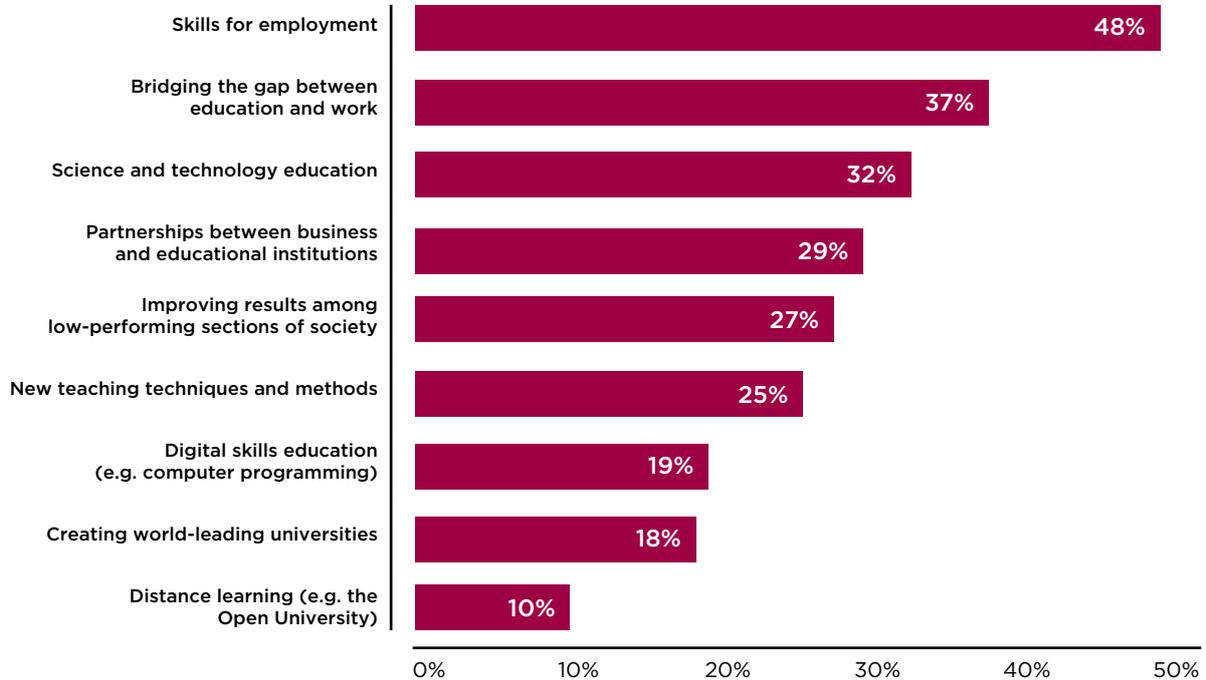
Gender: Male n = 1,035; Female n = 1,042.

Earlier detection and prevention of medical conditions (58 per cent), research into new medicines and treatments (47 per cent), and improving the technology used by the NHS to treat patients (40 per cent) are seen as the major benefits innovation can bring to healthcare in Britain.

Earlier detection and prevention is particularly important to over 55s (71 per cent) and women (62 per cent). Over 55s are also more likely to choose research into new medicines and treatments (55 per cent) and improving the technology used by the NHS to treat patients (45 per cent).

EDUCATION

Q. In which of the following ways, if any, can new ideas and technologies most improve education in Britain? Please select up to three.

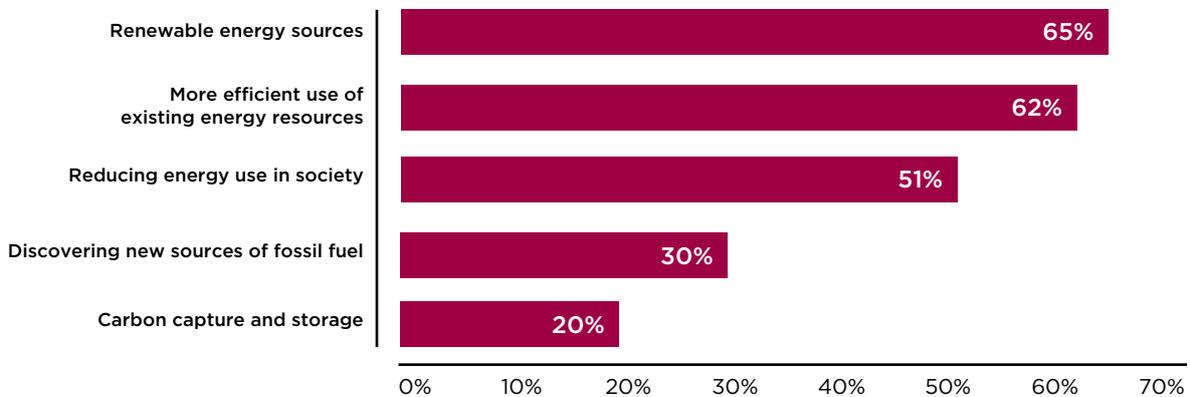


(Base: Total n = 2,077)

The key role new ideas and technologies can play in education revolves around employment – **skills for employment** (48 per cent) and **bridging the gap between education and work** (37 per cent). This reflects focus group discussions which talked about giving young people the skills to enter the workforce, and helping re-skill those who were struggling to find work.

ENERGY

Q. In which of the following ways, if any, can new ideas and technologies most improve the use of energy in Britain? Please select up to three.



(Base: Total n = 2,077)

Renewable energy sources (65 per cent), **more efficient use of existing energy resources** (62 per cent), and **reducing energy use in society** (51 per cent) are all seen as ways in which new ideas and technologies can improve the use of energy in Britain. These figures were consistent across all key demographics and political persuasions.

VIEWS ON THE ROLE OF GOVERNMENT

The perceived role of government is twofold:

1. **Planning for the future:** Driving innovation in those areas where people see a long-term human need for new technologies and new ways of doing things on a large scale – health, energy, housing, and infrastructure. Nearly two-thirds (65 per cent) of people believe government has principal responsibility for future planning in the economy. (see p.19)
2. **Adapting to change:** Steering Britain through the choppy waters of change – by updating laws and regulations, educating young people, training the workforce, and mitigating the negative consequences of socially disruptive innovations.

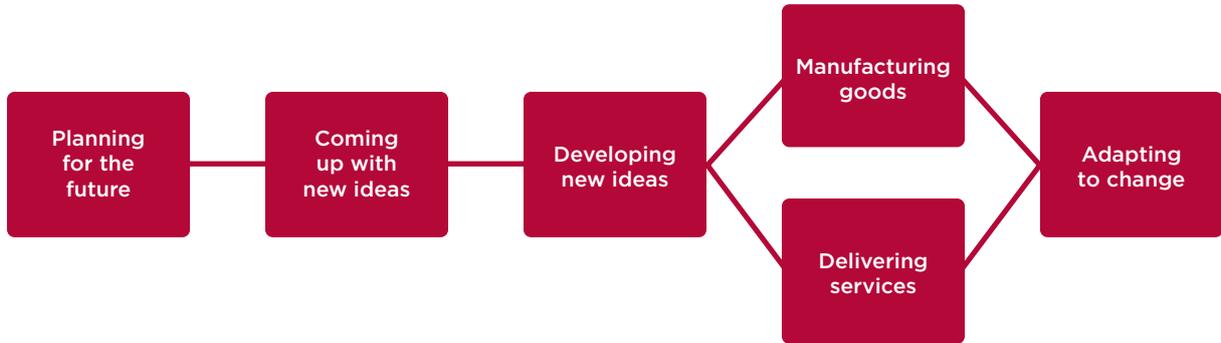
Voters question the capacity of government to plan beyond the current **electoral cycle**. For this reason, it is important to emphasise innovation as something that transcends party political boundaries. A relatively small number of highly politicised innovations buck this trend, and should be avoided among general audiences – genetically modified (GM) foods, nuclear energy, fracking, and anything with data privacy implications.

Perceptions of the role of government vary according to one's position in society and one's voting habits. Some ideas are common to voters of all political persuasions, and should be considered as a manifesto commitment by all parties:

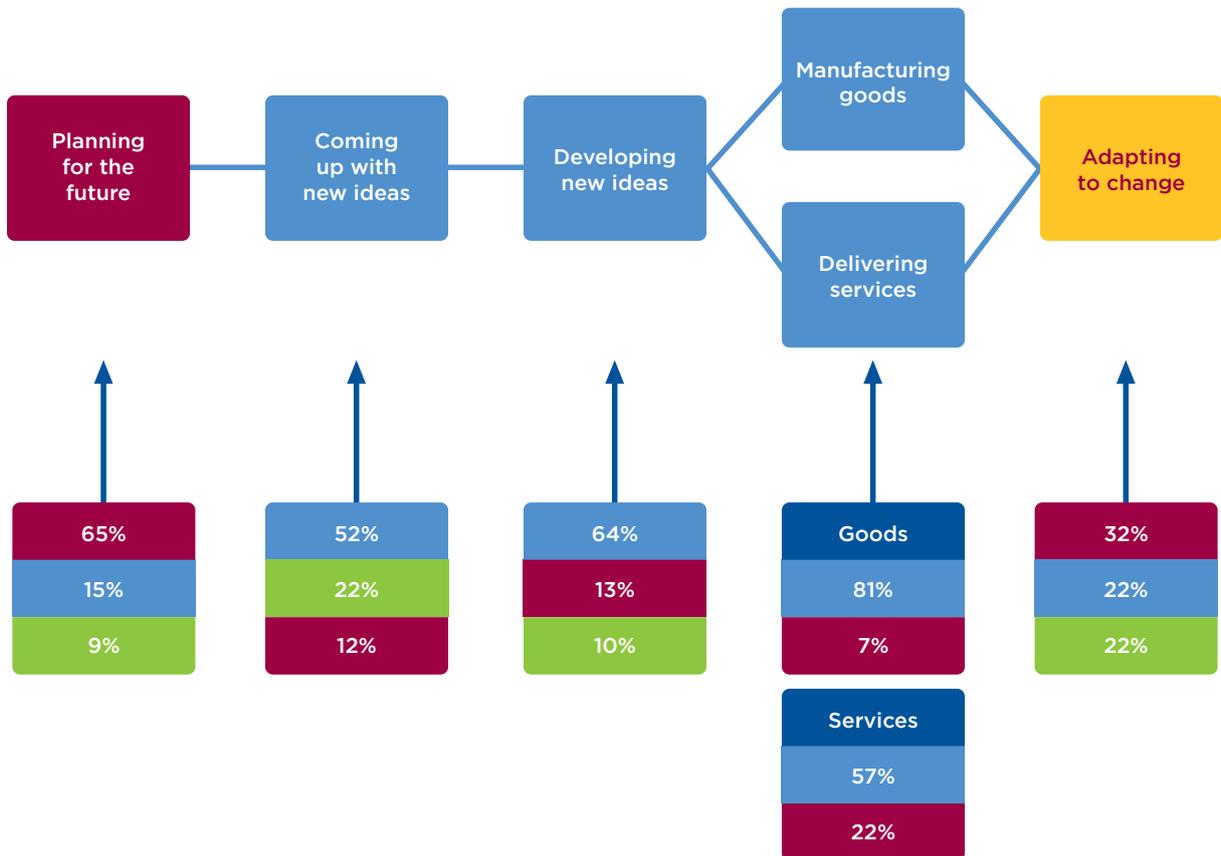
| Government should... | Government shouldn't... |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> • Plan beyond the current electoral cycle by working across party lines. • Drive education and training, including apprenticeships and re-training opportunities for older workers. • Deliver schemes and infrastructure that help see British ideas from conception through to delivery. • Ensure that laws and institutions keep up with the pace of technological change. • Work to mitigate the (perceived) in-built disposability and deliberate incompatibility of some consumer goods. • Foster a fertile environment for SMEs to grow and generate new ideas across the country. • Help parents understand the challenges faced by their children in a digitally connected world. | <ul style="list-style-type: none"> • Micromanage the implementation of innovation policy. • Interfere in the delivery of market-driven consumer goods ('inventions' and 'gadgets'). • Protect large businesses at the expense of SMEs. • Invade people's privacy by monitoring communications or collecting unnecessary data. • Dwell on the past – the public are cautious and concerned about the future, but not nostalgic. |

The innovation life cycle involves **long-term planning, generating ideas, developing ideas, implementation and delivery, and adapting to change**:

■ Government ■ Business ■ Individuals ■ Mixed



Respondents were asked who – out of government, business, communities, and individuals – should be responsible for different stages of the innovation life cycle:



HOW THE UK PUBLIC SEES BRITAIN'S POSITION IN THE WORLD

“ I say there is a global race out there to win jobs for Britain and I believe in leading from the front. So I make no apology for linking Britain to the fastest growing parts of the world. ”
 –David Cameron, Lord Mayor’s Banquet Speech, November 2012

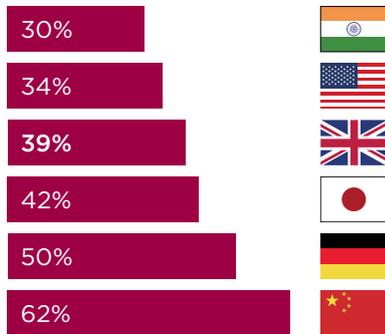
Our research suggests that the “global race” message favoured by the Conservative Party has some traction, particularly when it is linked to investment in people, but also that members of the public are usually resigned to accept China’s competitive advantage in low-cost labour, or Germany’s larger manufacturing sector. For many people, the global race is less important than the personal race to keep up with the pace of change, and less inspiring than the universal race to safeguard our children’s futures.

When asked what the major risks of failing to invest in innovation are, the most widely chosen option was losing business to other countries (49 per cent), especially among key audiences like over 65s (65 per cent) and affluent ABs (56 per cent), (see p.13). This indicates that the global race can be powerful in a negative sense – as a perceived risk factor facing policymakers.

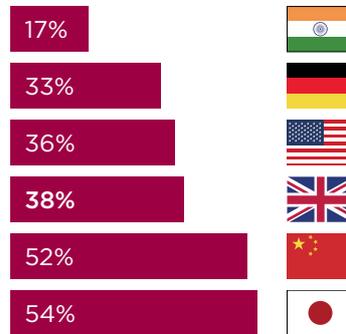
Nationalism and innovation make uneasy bedfellows in modern British society. People (especially men) perceive stark differences in the structures of countries’ economies, which they believe afford them certain advantages. ‘Made in China’ symbolises cheap labour, high productivity, low prices, and a lack of health and safety. Japan is still seen as the leader in hi-tech innovation, while America is perceived as a big funder of innovation. Social innovation is typically associated with countries like Canada, the Netherlands, and the Nordic countries.

Q. Which countries, if any, would you associate with each of the following?

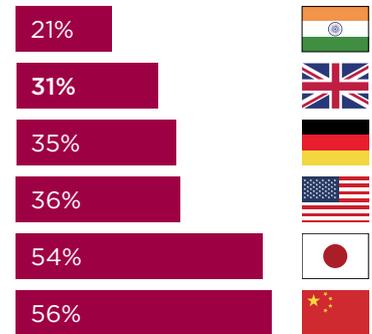
1. Planning for the future



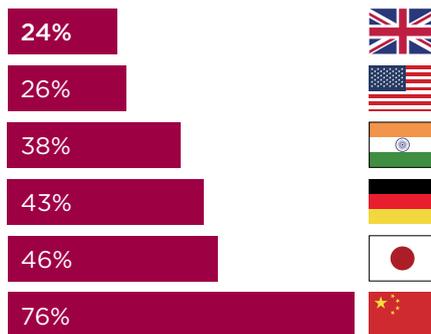
2. Coming up with new ideas



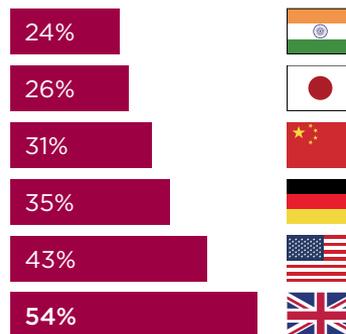
3. Developing new ideas



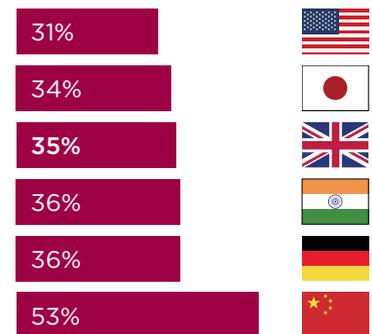
4a. Manufacturing products



4b. Delivering services



5. Adapting to change



(Base: Total n = 2,077)

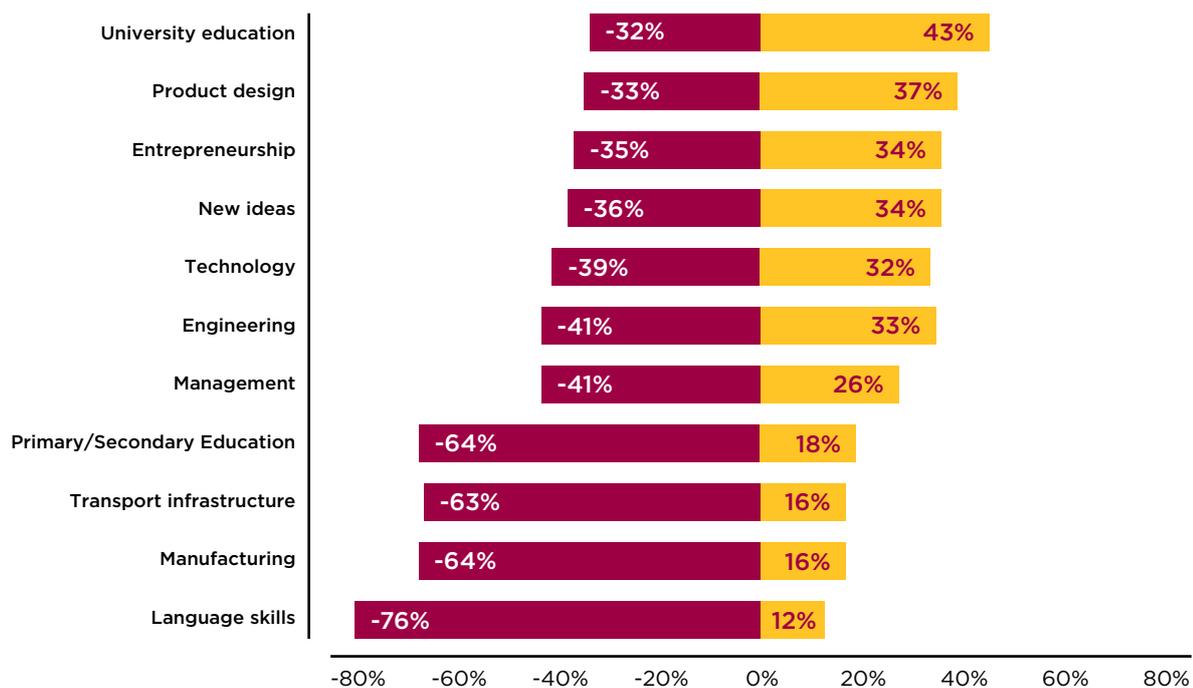
Respondents were presented with the different stages of the innovation life cycle and asked which countries – out of Britain, China, Germany, India, Japan and the USA – they associated with each stage. These countries were tested because they were frequently raised in discussions about innovation in phase two of the project, and have all been included in the “global race” narrative.

Service delivery (54 per cent) is the only stage in the innovation cycle that most people associate with Britain. The graphic shows how the global power balance has shifted in the minds of the British public, with the United States lagging behind China at every stage except service delivery.

There is little desire, however, for Britain to imitate other economies – rather, there is an expectation that Britain should capitalise on its existing strengths. The country is seen to be a hotbed of good ideas, even if those ideas are often realised and refined overseas. Thus **education, vocational training, and supporting small businesses** are seen as the principal ways in which Britain can see *ideas through*.

BRITAIN'S STRENGTHS AND WEAKNESSES

Q. For each of the following, would you say this is an area where Britain is stronger than rival countries, weaker than rival countries, or in line with rival countries?



(Base: Total n = 2,077)

There is no area where a majority of people see Britain as stronger than rival countries. The highest scoring areas are **university education** (43 per cent believing Britain is stronger than rival countries), and **product design** (37 per cent).

A majority of people see Britain as weaker than rival countries in **language skills** (76 per cent), **manufacturing** (64 per cent), **primary and secondary education** (64 per cent), and **transport infrastructure** (63 per cent).

The figures for education show an interesting divergence in perceptions of higher education and children's education.

Perceptions of the UK's strengths and weaknesses as a nation

| Strengths | Weaknesses |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> • Product Design "We're better at designing (than China)." (<i>INNOVATION CREATIVES</i>, Bristol) • Ideas "We come up with the ideas." (<i>INNOVATION SCEPTICS</i>, Birmingham) • Reputation "One thing about Britain is the reputation" (<i>INNOVATION ROMANTIC</i>, London) • Construction "The building game is better than abroad." (<i>INNOVATION CREATIVES</i>, Bristol) | <ul style="list-style-type: none"> • Labour costs "It's a lot cheaper (in China) than it is to live here." (<i>INNOVATION CREATIVES</i>, Bristol) • Manufacturing "Manufacturing has taken a nosedive over the years." (<i>INNOVATION SCEPTICS</i>, Birmingham) • Slow to react "The UK, we're so slow." (<i>INNOVATION ROMANTIC</i>, Leeds) • Regulations "In China they don't have health and safety." (<i>INNOVATION CREATIVES</i>, Bristol) • Recycling "Recycling, I don't think we're very good." (<i>INNOVATION REALIST</i>, Glasgow) |

Other goals of innovation – such as improved consumer goods and services – are seen through the prism of the global marketplace. Few people express pride in British smartphones, British refrigerators, or British retail banks. Equipping the population and business to capitalise on the opportunities innovation presents – through education, training and infrastructure – is the main priority for the public, rather than promoting British brands.

Britain's economic position in the world is seen as **open**. Majorities also see Britain's economic position as **looking forward** and **respected**.

DEFENDING INNOVATION

Investment in innovation is an area that can easily be targeted for cuts in a time of recession. Our research has looked at how some of the common attacks against innovation as a policy objective can be rebutted (see *Appendix 2 for data analysis*):

Attack: Government doesn't need to be involved in innovation. If government stayed out of it, innovation would happen anyway.

Rebuttal: Government has a key role to play in planning for the future (65 per cent of people choose this as principally the responsibility of government). Businesses alone cannot drive innovation – money from government is vital to ensure we see ideas through to completion, so that we do not lose jobs and ideas to other countries.

Attack: It's too risky for government to spend public money on innovation and research projects when we don't know exactly what we'll get from it.

Rebuttal: The biggest risk is that we don't back British talent with the money and resources it needs to thrive – letting other countries profit from our ideas.

Attack: The pace of change is too fast in society to understand the consequences of advances in science and technology.

Rebuttal: Change is unavoidable – we can keep up with the pace of change by investing in schools and universities and building infrastructure. Again, government has the key role to play in planning for the future.

Attack: We should focus on immediate problems, like reducing the UK's debt, and avoid getting distracted by what might happen in ten or 20 years' time.

Rebuttal: Our children and grandchildren deserve a future with good job prospects and healthy, peaceful lives. They deserve the same opportunities we had. This means planning for the long term.

Attack: Our lives are already too full of new things – we should make better use of what we have.

Rebuttal: If humans had never tried to innovate, we would still be living in caves and hunting with sticks. New ideas and technologies continue to bring real benefits to our lives – for example, using fibre optics and high-definition (HD) television for keyhole surgery, dramatically reducing recovery times.

Attack: Innovation just increases the differences between the 'haves' and the 'have nots'.

Rebuttal: Innovation has given more people access to technology by pushing prices down. Things that used to be unaffordable to ordinary people are now everyday household objects. These aren't just gadgets, but also important innovations that give people access to better healthcare, better education, and better jobs.

COMMUNICATING INNOVATION POLICY

A. MOCK SPEECH TESTING

Respondents were presented with a mock speech on innovation. This included key phrases from speeches by David Cameron (on the ‘global race’), Ed Miliband (on the ‘cost of living crisis’), and Bill Gates (on innovation and progress). These findings should be treated with caution, as the format is susceptible to order-effect bias and ambiguous interpretation. It is clear nonetheless, that some messages are many times more likely to resonate with voters than others, and that different demographics react far more strongly to particular narratives.

Q. Below is an extract of a speech about innovation. Please click once on the sentences in the message that you most identify with, this will turn them green. To clear a selection, click for a second time to cancel your choice.

(per cent identifying with sentence in brackets)

“ *The world is changing quickly (26 per cent). We can’t bury our heads in the sand and pretend that change won’t happen (28 per cent). Change is often a force for good (17 per cent). Innovation has increased prosperity (16 per cent).*

There is a global race to win jobs for Britain (16 per cent). We should lead that race from the front (18 per cent). This also means linking Britain to the fastest growing parts of the world (17 per cent). Emerging economies like China and India (12 per cent).

Britain also faces a cost of living crisis (30 per cent). We should be willing to talk about the inequality in our society (26 per cent). Progress means nothing if the benefits are only experienced by a few people (28 per cent). So we should give everyone access to new ideas and technologies (22 per cent).

Innovation is what has brought mankind to where we are today (24 per cent). It has made the world a smaller place (15 per cent). The internet (13 per cent). Smartphones (11 per cent). Modern communications technologies have changed the world for the better (21 per cent).

We need new ideas in healthcare (40 per cent). New ideas in education (33 per cent). New ideas in the economy (33 per cent). That means investing government money (23 per cent).

And we need to plan for the future (24 per cent). Our children and grandchildren deserve the same opportunities we had (32 per cent). So that means investing in infrastructure (18 per cent). That means politicians thinking beyond the next election (26 per cent).

Talking about innovation is fine (7 per cent). But we need to back new ideas and technologies with the funding and resources they need (29 per cent). That is the only way Britain will meet tomorrow’s challenges (15 per cent). ”

(Base: Total n = 2,077)

B. TOP TEN MESSAGES IN DEMOGRAPHIC DETAIL

The top ten lines from the speech are listed in order below, with key demographics highlighted:

| Rank (%) | Line | Target demographic | Breakdown (% identifying with message) |
|-----------------|--------------------------------------------------------------------------------|----------------------------------|--------------------------------------------------|
| 1 40% | <i>"We need new ideas in healthcare."</i> | Older people | 18-34 (30%) 35-54 (37%) 55+ (52%) |
| 2 33% | <i>"New ideas in education."</i> | Broad appeal across demographics | |
| 3 33% | <i>"New ideas in the economy."</i> | Broad appeal across demographics | |
| 4 32% | <i>"Our children and grandchildren deserve the same opportunities we had."</i> | Older people | 18-34 (24%) 35-54 (29%) 55+ (41%) |
| 5 30% | <i>"Britain also faces a cost of living crisis."</i> | Non-Conservative voters | Con (23%) Lab (32%) LD (31%) UKIP (34%) |

6

29%

“But we need to back new ideas and technologies with the funding and resources they need.”

Older people

18-34 (18%)
35-54 (24%)
55+ (43%)

7

28%

“We can’t bury our heads in the sand and pretend change won’t happen.”

Older people

18-34 (21%)
35-54 (25%)
55+ (37%)

Non-Labour voters

Con (33%)
Lab (22%)
LD (33%)
UKIP (31%)

8

28%

“Progress means nothing if the benefits are only experienced by a few people.”

Older people

18-34 (20%)
35-54 (27%)
55+ (35%)

Non-Conservative

Con (19%)
Lab (31%)
LD (40%)
UKIP (33%)

9

26%

“The world is changing quickly.”

Broad appeal across demographics

10

26%

“We should be willing to talk about the inequality in our society”

Labour voters
Lib Dem voters

Con (19%)
Lab (31%)
LD (37%)
UKIP (23%)

(Base: Total n = 2,077)

Age: 18-34 n = 596; 35-54 n = 678; 55+ n = 803.

Voting intention: Con n = 492; Lab n = 582; LD n = 152; Lib n = 221

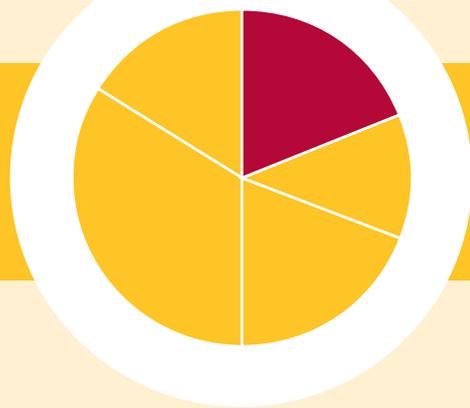
A MESSAGING STRATEGY FOR THE INNOVATION PERSONAS

We know intuitively that attitudes towards innovation are as diverse as the population itself – that some people are more inclined towards risk, creativity, long-term planning, or originality, for example. Our first report *Innovation Population: The UK's views on Innovation* statistically segmented the British public, along these lines, into five attitudinal groups or personas – **INNOVATION FUTURISTS, INNOVATION ROMANTICS, INNOVATION CREATIVES, INNOVATION REALISTS, and INNOVATION SCEPTICS.**

Here, we suggest how innovation policy can be communicated in a way that takes into account the interests and concerns of each group.

INNOVATION FUTURISTS

19 PER CENT OF THE UK POPULATION



| Factor | |
|----------------------------------------------|-----------------------------------|
| Pace of change and innovation over-reach | Unconcerned |
| Personal creativity and risk taking | Average |
| Importance of new ideas and risks in society | Average |
| Future planning | Tend to be future planners |
| Excitement about innovation | Tend not to get excited |
| Ethical/rights focus | Low ethical/rights focus |
| State and social focus | Average |

| Characteristics | |
|---------------------------|-----------------------------------------------------|
| Gender | Typically Male (63%) |
| Age | In line with general population |
| Social grade | Typically ABC1 (more affluent) |
| Politics | Con 28%, Lab 20%, LD 7%, UKIP 14% |
| Current affairs interests | Broad, low interest in environment |
| Innovation interests | Science, technology, vehicles, engineering |
| Activities | More active in all areas than other segments |

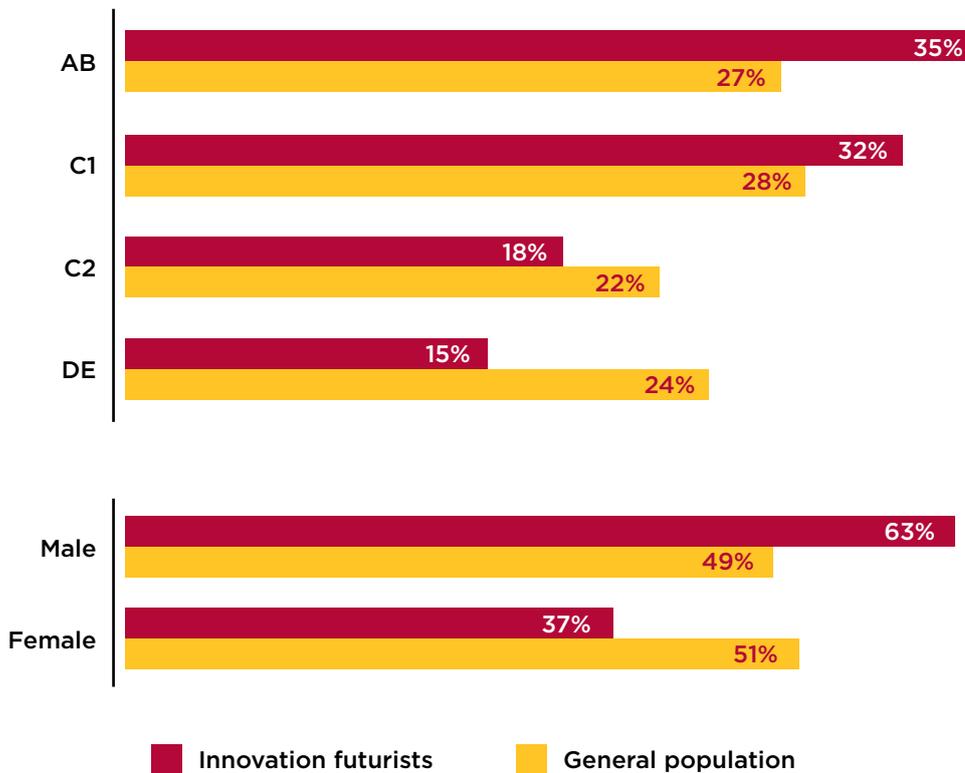
| Innovations | |
|--------------|-----------------------------------------------------------|
| Favourable | Typically all, including controversial innovations |
| Unfavourable | - |

Overview

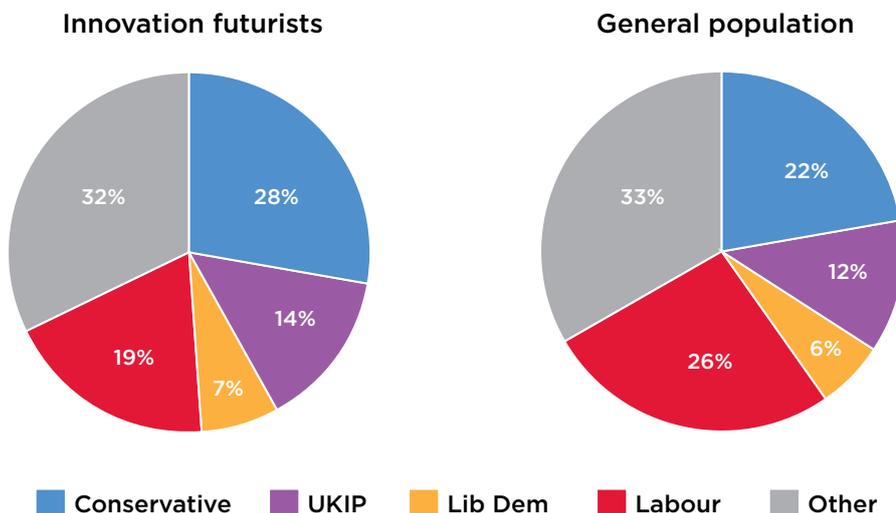
INNOVATION FUTURISTS (19 per cent of the UK population) are the natural audience for innovation policy communications. They tend to be unconcerned about the pace of change in society, and take a long-term view on their own lives and the wider world. They are more active in most areas of innovation and are more favourable towards controversial innovations, tending to balance risk with reward in their analysis. Their increased engagement with innovation means that they most readily understand the relationship between disparate types of innovation.

Who are they?

While our attitudinal segments include people from a disparate range of backgrounds and demographic profiles, the archetypal **INNOVATION FUTURIST** is an affluent (ABC1) male:



They are also more likely to vote Conservative, and less likely to vote Labour than other segments:



SUGGESTED MESSAGING STRATEGY

Messaging among this audience can be more detailed and policy-focused, and can:

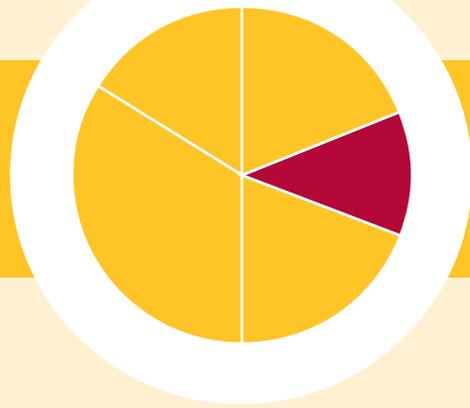
- Challenge and include controversial innovations (3D printing of organs for surgical purposes, GM crops, nuclear) as well as more commonplace innovations to illustrate the role of innovation in society.
- Relate to being proactive in coming up with new ideas to improve society as this segment identifies most strongly with innovators.
- Show how various innovations have improved society/advanced something that was already there.
- Be confident in using the word innovation knowing it will be understood by this segment in its broadest sense.
- Talk about how innovations can address environmental problems such as researching/using renewable sources of energy/diminishing fossil fuels.
- Demonstrate that innovation is beyond immediate party political concerns, is part of long-term planning for the future and will consider the needs of future generations.

Channels

- Broadsheet newspapers but note high readership also among **INNOVATION REALISTS**.
- Specialist publications.
- Events and broadcasts targeted at specialist professional audiences.

INNOVATION ROMANTICS

12 PER CENT OF THE UK POPULATION



| Factor | |
|----------------------------------------------|-------------------------------------|
| Pace of change and innovation over-reach | Average concern |
| Personal creativity and risk taking | Low |
| Importance of new ideas and risks in society | High |
| Future planning | Tend not to plan ahead |
| Excitement about innovation | High |
| Ethical/rights focus | Low ethical/rights focus |
| State and social focus | Market and consumer oriented |

| Characteristics | |
|---------------------------|--------------------------------------------|
| Gender | 60% Male, 40% Female |
| Age | Typically Older |
| Social grade | Typically C2DE |
| Politics | Con 22%, Lab 27%, LD 5%, UKIP 16% |
| Current affairs interests | No specific interests |
| Innovation interests | Science, Technology, Communications |
| Activities | Least active in most areas |

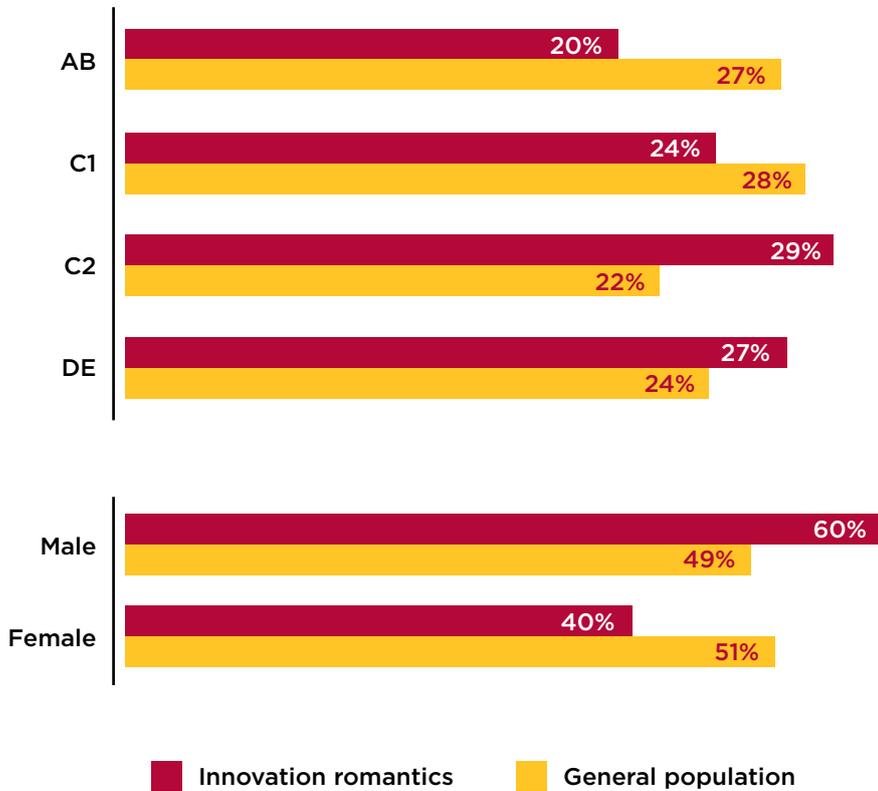
| Innovations | |
|--------------|-----------------------------------------------------------|
| Favourable | Typically all, including controversial innovations |
| Unfavourable | - |

Overview

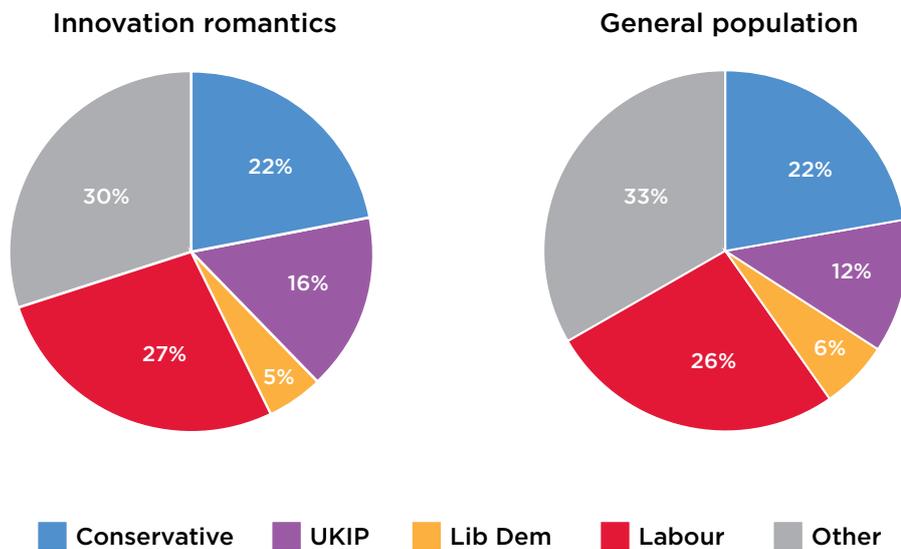
INNOVATION ROMANTICS (12 per cent of the UK population) find consumer innovation exciting and interesting, but tend not to engage with innovation as a policy or with long-term innovation objectives. They are more likely than other segments to agree that *“new ideas and products are what make a country great – even if they don’t have much economic benefit”*. The high intrinsic value they attach to innovation means that they tend to approve of most innovations they have come into contact with or heard about in the media. They are, however, the least likely to have participated in any of the innovative activities tested in the survey. Despite two-thirds (68 per cent) saying they would be interested in hearing about new scientific and technological innovations, only 9 per cent have conducted a scientific research experiment, compared with 13 per cent of the general population.

Who are they?

While our attitudinal segments include people from a disparate range of backgrounds and demographic profiles, the archetypal **INNOVATION ROMANTIC** is a C2DE male:



Their voting intention is largely in line with the general public, tilting slightly more than average towards UKIP:



SUGGESTED MESSAGING STRATEGY

This audience is interested and excited by end products. Messaging should:

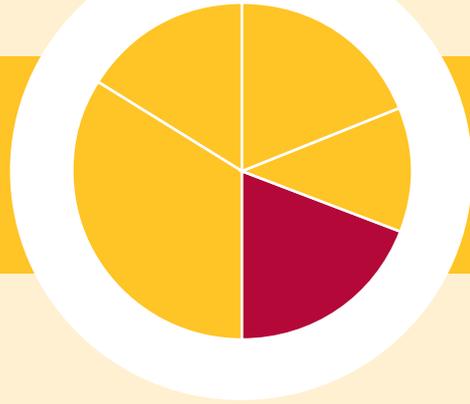
- Use interesting, 'quirky' innovations – gadgets and new technologies – as a vehicle to introduce the benefits of specific innovation policies.
- Focus on entertainment as well as practical application.
- Show how small steps can have a big impact on the future.
- Not include party-political undertones.
- Be clear and not offer in-depth analysis, but demonstrate headline benefits.
- Show how innovation can be part of what makes Britain great.

Channels

- Tabloid newspapers and websites – *The Sun*, *The Mirror*.
- Popular technology publications and shows.
- 'Piggy backed' onto consumer advertising.

INNOVATION CREATIVES

19 PER CENT OF THE UK POPULATION



| Factor | |
|----------------------------------------------|-------------------------------|
| Pace of change and innovation over-reach | Average concern |
| Personal creativity and risk taking | High |
| Importance of new ideas and risks in society | Low |
| Future planning | Tend not to plan ahead |
| Excitement about innovation | Above average |
| Ethical/rights focus | Average |
| State and social focus | Tend to think socially |

| Characteristics | |
|---------------------------|--------------------------------------------|
| Gender | Broadly equal: 57% Female, 43% Male |
| Age | Typically Younger |
| Social grade | In line with general population |
| Politics | Con 20%, Lab 29%, LD 7%, UKIP 9% |
| Current affairs interests | No specific interests |
| Innovation interests | The Arts, Sport |
| Activities | Used a smartphone for e-banking |

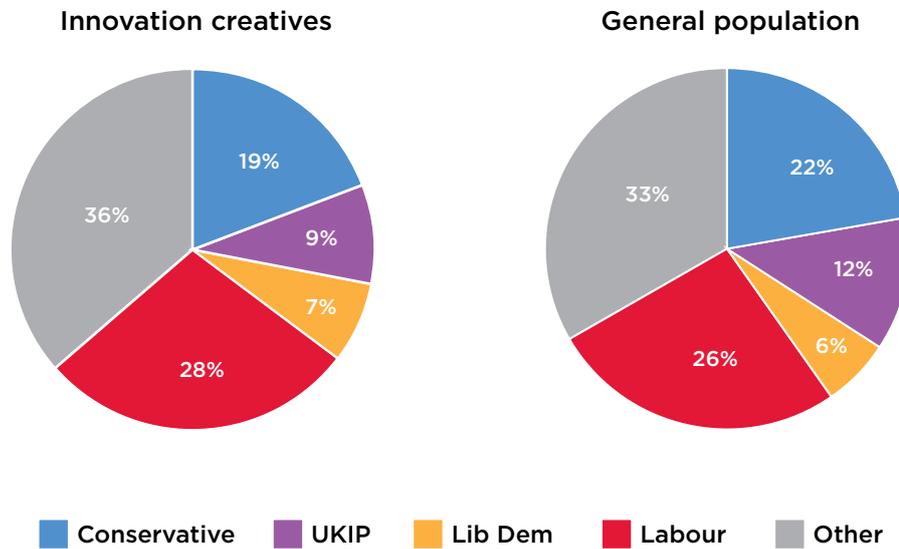
| Innovations | |
|--------------|-------------------------------------|
| Favourable | Online shopping, smartphones |
| Unfavourable | GM foods, space travel |

Overview

INNOVATION CREATIVES (19 per cent of the UK population) are typically younger than average, confident and on-trend, displaying high levels of personal creativity and a social perspective on life. They are the least cautious segment, and the most likely to agree that they are “*creative and often come up with new ways of doing or thinking about things*”. They struggle the most to bring innovation together as a single concept, and therefore tend to see innovation as a series of different processes with different features. They relate best to innovation when it is described in terms of everyday practical solutions and modes of communication – including arts and entertainment media, where they are more interested in hearing about new innovations than other segments.

Who are they?

There are no significant differences in gender and social grade makeup in this group. They are less political than the general population, with those who do vote tending to lean more to the left.



SUGGESTED MESSAGING STRATEGY

This audience prefers to see innovation explained through very specific examples of creativity, rather than as a broad concept:

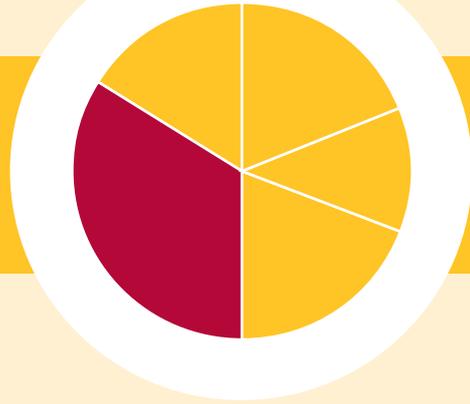
- Illustrate through impact on the arts, sports, entertainment and social lives.
- Also practical solutions to everyday problems.
- Focus on the role creative people play in making innovation happen.
- Try to show how creative innovations can be genuinely beneficial to society – e.g. 3D printing of human organs.

Channels

- Tabloid newspapers and websites – *The Sun*, *The Mirror*.
- Arts, sports, entertainment media.
- Social media.
- Specialist creative audiences.

INNOVATION REALISTS

34 PER CENT OF THE UK POPULATION



| Factor | Average concern |
|----------------------------------------------|-----------------|
| Pace of change and innovation over-reach | Average concern |
| Personal creativity and risk taking | Average |
| Importance of new ideas and risks in society | High |
| Future planning | Average |
| Excitement about innovation | Low |
| Ethical/rights focus | High |
| State and social focus | Average |

| Characteristics | |
|---------------------------|-----------------------------------|
| Gender | 57% Female, 43% Male |
| Age | In line with general population |
| Social grade | Typically ABC1 |
| Politics | Con 23%, Lab 28%, LD 7%, UKIP 11% |
| Current affairs interests | Wide interest in current affairs |
| Innovation interests | Healthcare, energy, education |
| Activities | In line with general population |

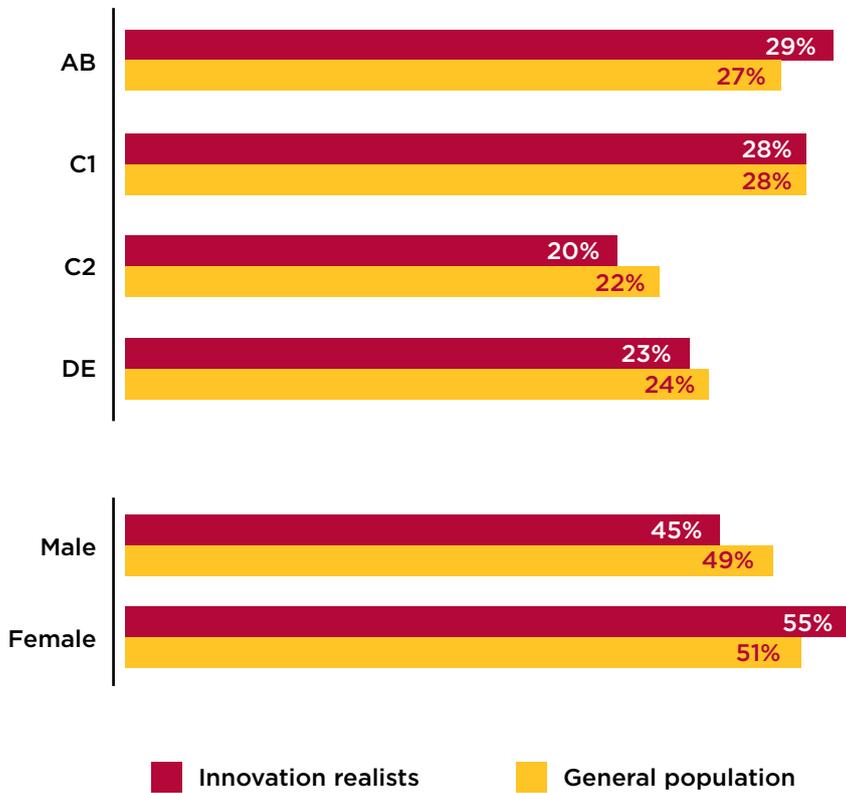
| Innovations | |
|--------------|--------------------------|
| Favourable | Human stem cell research |
| Unfavourable | GM foods, space travel |

Overview

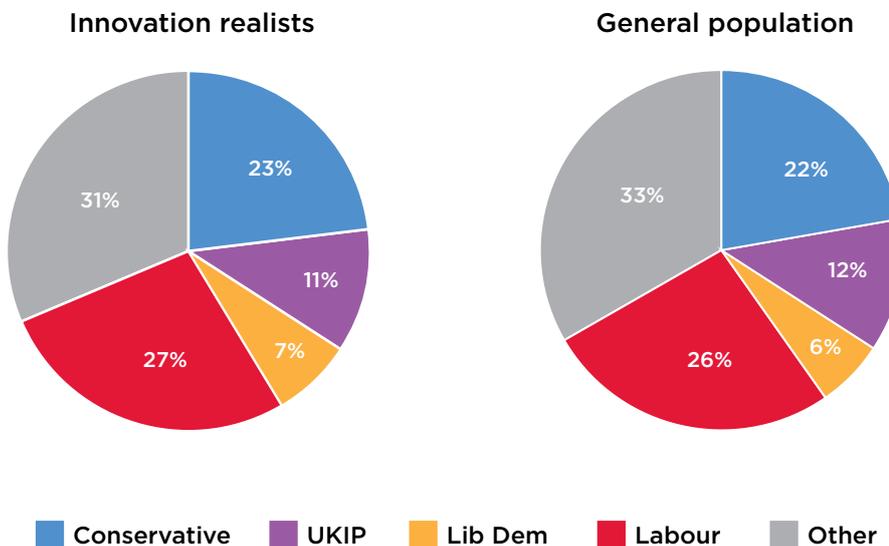
INNOVATION REALISTS (34 per cent of the UK population) are the largest segment in the Innovation Population, and likely to be particularly important to those trying to communicate the benefits of innovation. This is because they tend to appreciate the broad innovation policy environment, but are not excited by innovation per se, believing that ethics and rights should be central to innovation policy and delivery. They are the segment most interested in current affairs, particularly valuing social innovations – in areas like health, education, and transport.

Who are they?

While our attitudinal segments include people from a disparate range of backgrounds and demographic profiles, the archetypal **INNOVATION REALIST** is somewhat older (average age 50, compared with 43 for **INNOVATION CREATIVES**) and more interested in current affairs than other segments.



They are slightly more likely to vote than the general population, but generally reflect national voting patterns:



SUGGESTED MESSAGING STRATEGY

This audience prefers to focus on broad policy objectives and everyday goals, fitting innovation into these requirements, rather than the other way round. Messaging should:

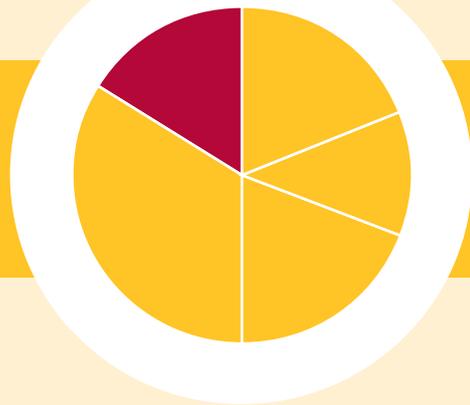
- Demonstrate ways of improving systems and infrastructure.
- Demonstrate incremental change and value for public money.
- Link innovations to the public or social good.
- Be transparent about the pros and cons.

Channels

- Broadsheet newspapers.
- Public information campaigns.
- Community delivered messages.
- Face-to-face contact.

INNOVATION SCEPTICS

16 PER CENT OF THE UK POPULATION



| Factor | |
|----------------------------------------------|-----------------------------------|
| Pace of change and innovation over-reach | Concerned |
| Personal creativity and risk taking | Low |
| Importance of new ideas and risks in society | Low |
| Future planning | Tend to be future planners |
| Excitement about innovation | Tend to get excited |
| Ethical/rights focus | Above average |
| State and social focus | Average |

| Characteristics | |
|---------------------------|------------------------------------------------------------------------------|
| Gender | Typically Female (70%) |
| Age | Typically Younger |
| Social grade | Typically C2DE (less affluent) |
| Politics | Con 15%, Lab 31%, LD 4%, UKIP 14% |
| Current affairs interests | Economy, Healthcare/NHS |
| Innovation interests | Healthcare, social care |
| Activities | Created or modified a recipe, Created or modified an item of clothing |

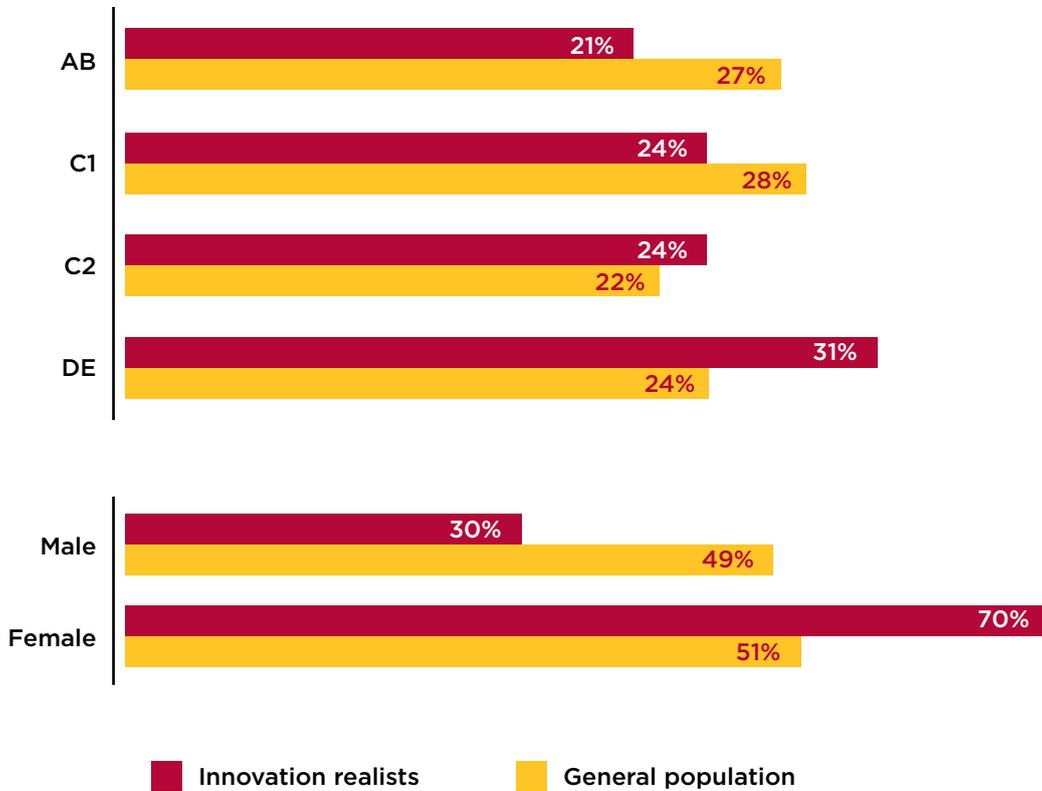
| Innovations | |
|--------------|-------------------------------------------------------|
| Favourable | Medicine, health-related |
| Unfavourable | GM foods, nuclear energy, space travel, robots |

Overview

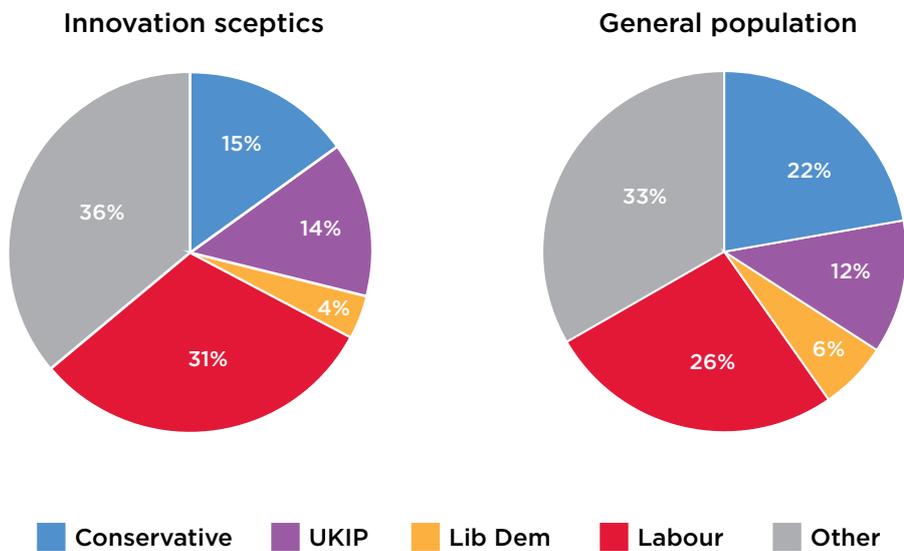
INNOVATION SCEPTICS (16 per cent of the UK population) are people who are particularly concerned about the pace of change in society. They are cautious and practical, seeing new ideas as less important than solving problems by using existing ideas and technologies better. Like **INNOVATION REALISTS**, they are interested in social innovations, but tend to be more focused on the impact of policy on their lives, rather than ethical concerns. They also express much more concern about the recession and the availability of good jobs. They are very uncomfortable with radical innovation, preferring to talk about all innovation as incremental innovation.

Who are they?

While our attitudinal segments include people from a disparate range of backgrounds and demographic profiles, the archetypal **INNOVATION SCEPTICS** is a C2DE woman:



INNOVATION SCEPTICS are much less likely to support the governing coalition, preferring Labour and UKIP:



SUGGESTED MESSAGING STRATEGY

This audience feels powerless, and responds by being cautious and practical. Messaging should:

- Reflect the need for practical solutions to everyday challenges, including the cost of living.
- Demonstrate the state's involvement and concern for long-term planning.
- Focus on ways of using innovation to enable deprived communities to flourish.

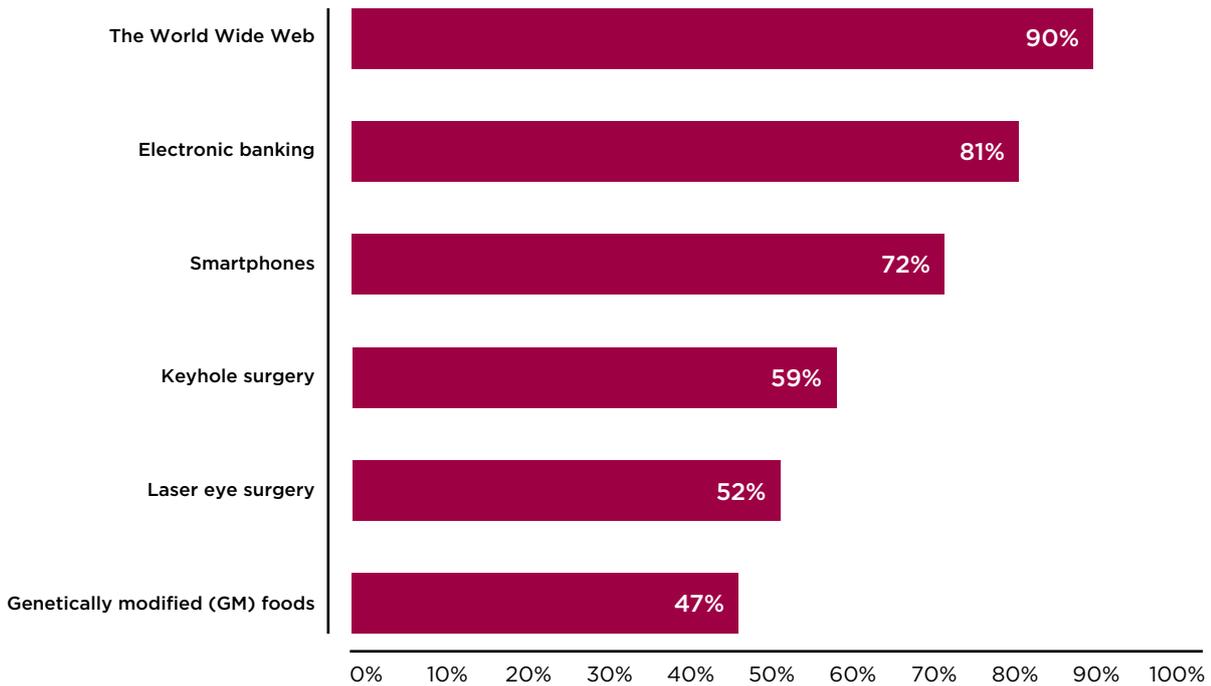
Channels

- Difficult to access directly.
- Any channel targeted at C2DE women.

INNOVATION STORIES

FAMILIARITY

Q. How familiar or unfamiliar are you with the following?

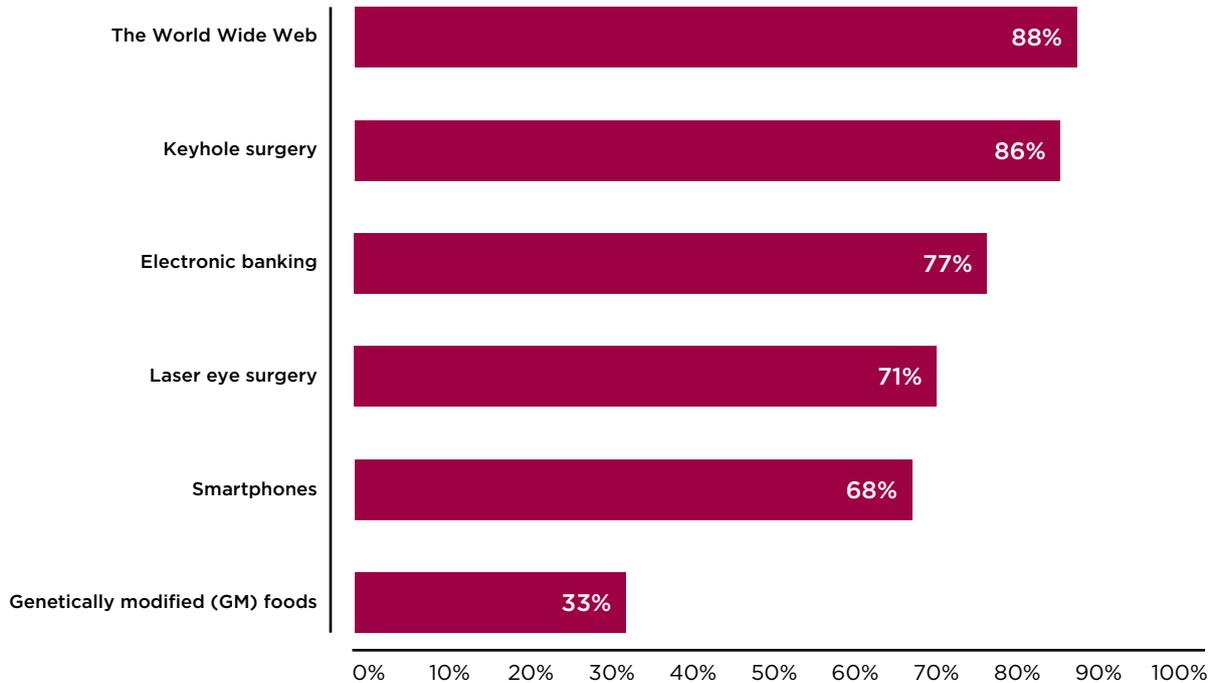


(Base: Total n = 2,077) (% answering familiar)

The innovations with which people are most familiar are the **World Wide Web** (90 per cent), **electronic banking** (81 per cent), and **smartphones** (72 per cent). Most people are also familiar with **keyhole surgery** (59 per cent) and **laser eye surgery** (52 per cent).

POSITIVE/NEGATIVE EFFECT ON SOCIETY

Q. To what extent do you think the following will have a positive or negative effect on society?



(Base: Total n = 2,077) (% answering positive)

The **World Wide Web** (88 per cent) and **keyhole surgery** (86 per cent) are overwhelmingly regarded as having a positive effect on society. In keeping with most findings on healthcare advances, keyhole surgery is particularly highly regarded by over 65s – 95 per cent of whom think it will have a positive effect on society.

METHODOLOGY

Phase 1 (Online Survey and Segmentation)

ComRes conducted an online survey among a nationally representative sample of 4,121 UK adults between 25 September and 10 October 2013. Data were weighted by age, gender, region, social grade to be representative of all UK adults.

The aim of this survey was to understand very broad attitudes towards innovation among the British public and to develop a statistical segmentation of the population according to personal attitudes relating to innovation.

Segmentation refers to a range of techniques and approaches that seek to categorise a population by their attributes, attitudes, behaviours, and/or needs. The Innovation Population segmentation allows attitudes and behaviours relating to innovation to be understood beyond the level of differences in age, gender, social class, and location. Indeed, the segmentation profiles over the next five sections show that while there are clear tendencies within different demographic groups, people from many different backgrounds share similar perspectives on innovation.

In this case, segmentation has been used in order to enhance the output from the qualitative phase of this research programme, by ensuring that each focus group brings together people with similar patterns of opinion on innovation.

Phase 2 (Focus Groups)

ComRes conducted 12 focus groups in six locations across the UK:

| Group | Location | Date | Segment(s) | Gender |
|-------|------------|-------------|----------------------------------------------|-------------------|
| 1 | Manchester | 12 Nov 2013 | INNOVATION SCEPTICS | Female |
| 2 | Manchester | 12 Nov 2013 | INNOVATION FUTURISTS | Male |
| 3 | Birmingham | 12 Nov 2013 | INNOVATION ROMANTICS | Female |
| 4 | Birmingham | 12 Nov 2013 | INNOVATION SCEPTICS | Male |
| 5 | Glasgow | 13 Nov 2013 | INNOVATION CREATIVES | Female |
| 6 | Glasgow | 13 Nov 2013 | INNOVATION REALISTS | Male |
| 7 | London | 13 Nov 2013 | INNOVATION REALISTS vs. INNOVATION ROMANTICS | Mixed Male/Female |
| 8 | London | 13 Nov 2013 | INNOVATION FUTURISTS vs. INNOVATION SCEPTICS | Mixed Male/Female |
| 9 | Leeds | 14 Nov 2013 | INNOVATION FUTURISTS | Female |
| 10 | Leeds | 14 Nov 2013 | INNOVATION ROMANTICS | Male |
| 11 | Bristol | 14 Nov 2013 | INNOVATION REALISTS | Female |
| 12 | Bristol | 14 Nov 2013 | INNOVATION CREATIVES | Male |

Recruitment

Recruitment specifications were designed to focus on archetypal participants from each segment – those scoring most strongly on the key identifiers of each segment. This approach allows us to understand the distinct characteristics of different attitudinal segments in as much depth as possible. A broad range of social grades and ages were chosen in each group, reflecting the social grade and age breakdowns of the respective segments.

Rationale

Segmenting public attitudes – and limiting groups to one segment or two opposing segments – was intended to allow distinct thought patterns and lines of argument to be explored in much greater depth than would be possible with attitudinally broader group specifications. Innovation is a very broad and vague subject, and the segmentation generated discussions that were specific to different groups.

Methodology – Phase 3 (Online Survey)

ComRes conducted an online survey among a nationally representative sample of 2,077 UK adults between 6 and 8 December 2013. Data were weighted by age, gender, region, and social grade to be representative of all UK adults.

The aim of this survey was to quantify the key findings from Phase 2 of the research, and to analyse in depth the messages and policy concerns that resonate most strongly with different sections of the British public.

SURVEY DATA

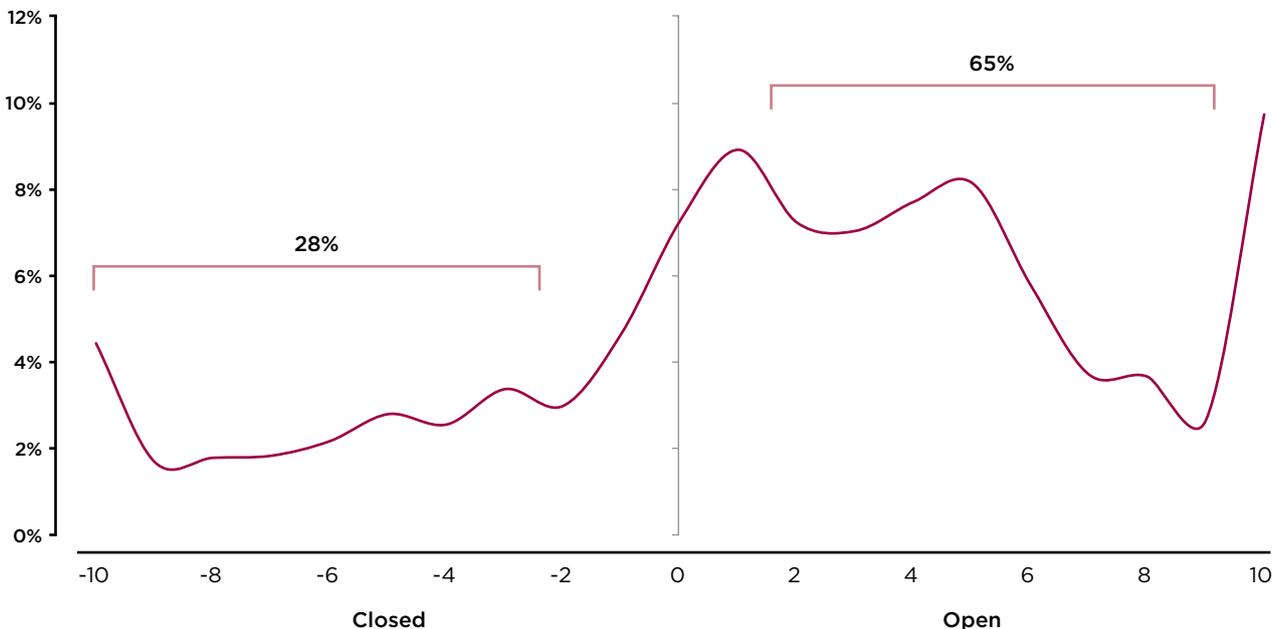
APPENDIX 1: BRITAIN'S POSITION IN THE WORLD

In the charts that follow, please note that when choosing between two statement pairs on a sliding scale, respondents tend to opt for the centre and the two extremes, creating three distinct peaks.

Q. For each of the following pairs of words, please pick the ones that best describe Britain's economic position in the world. The closer you move the slider towards a statement, the stronger you feel towards that statement.

(Base: Total n = 2,077)

Weak
Looking forward
Behind the pace
Open Flexible
Respected



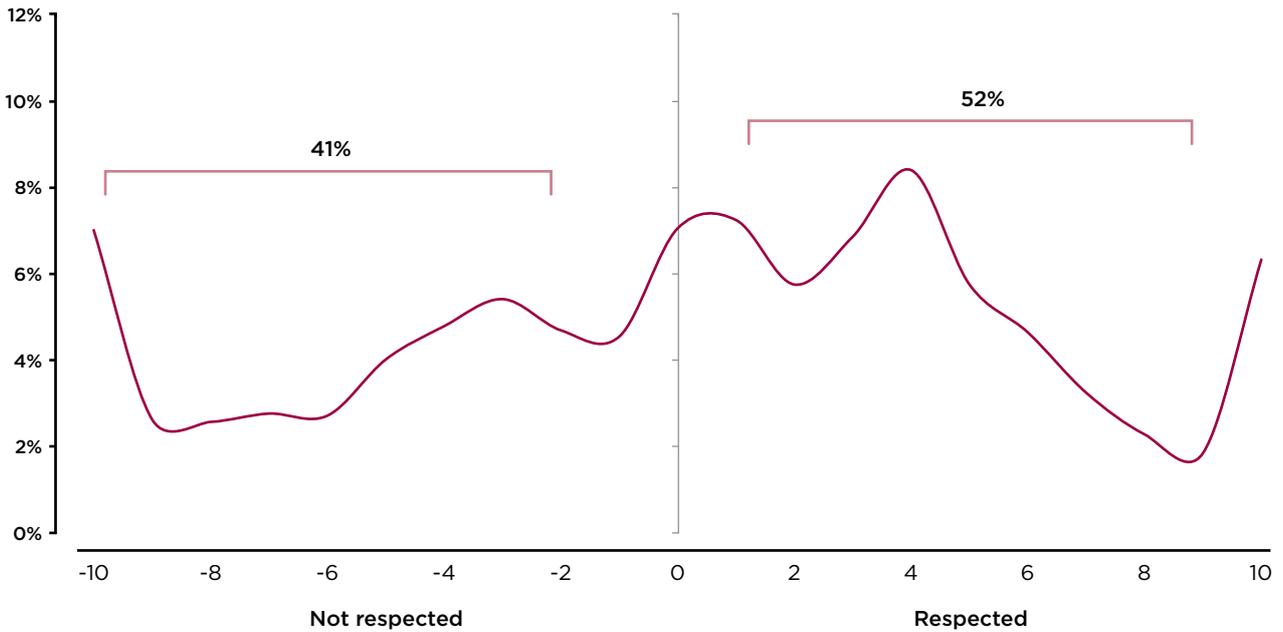
Britain's economic position in the world is overwhelmingly seen as **open**, with two-thirds (65 per cent) of people leaning more towards 'open' than 'closed'. This is much more pronounced among Conservative voters (84 per cent), affluent ABs (72 per cent), and people living in London (71 per cent).

(Base: Total n = 2,077)

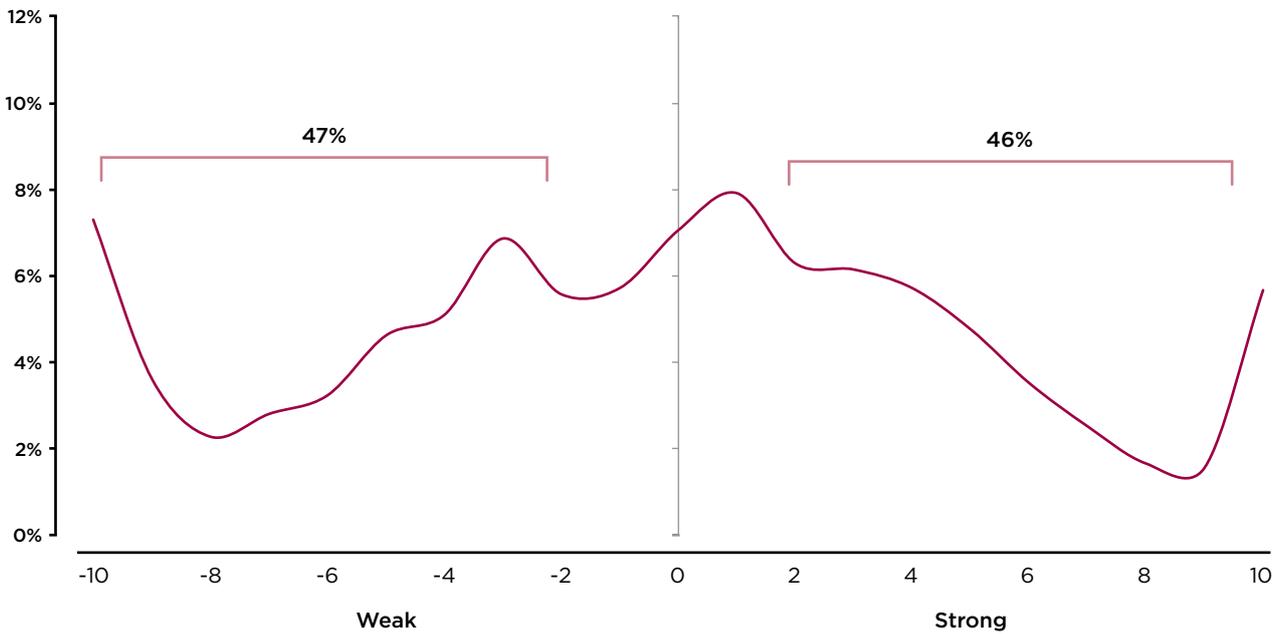
Voting intention: Con n = 492; Lab n = 582; LD n = 152; Lib n = 221

Location: London residents n = 276; Non-London residents n = 1,801.

Social grade: AB n = 602; C1 n = 627; C2 n = 349; DE n = 499

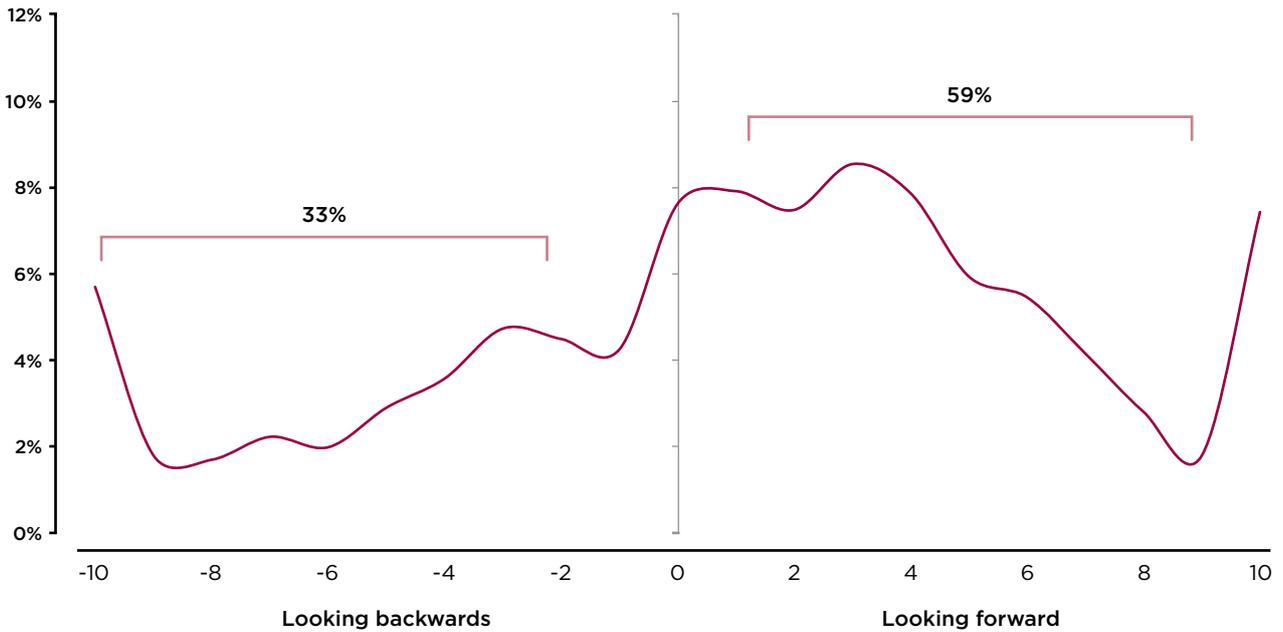


People tend to think Britain’s economic position in the world is **respected** (52 per cent), although a sizeable proportion (41 per cent) lean more towards ‘not respected’ and opinion is widely dispersed across the spectrum. Conservative voters (73 per cent) are much more likely to see Britain as respected, as are people living in London (67 per cent).

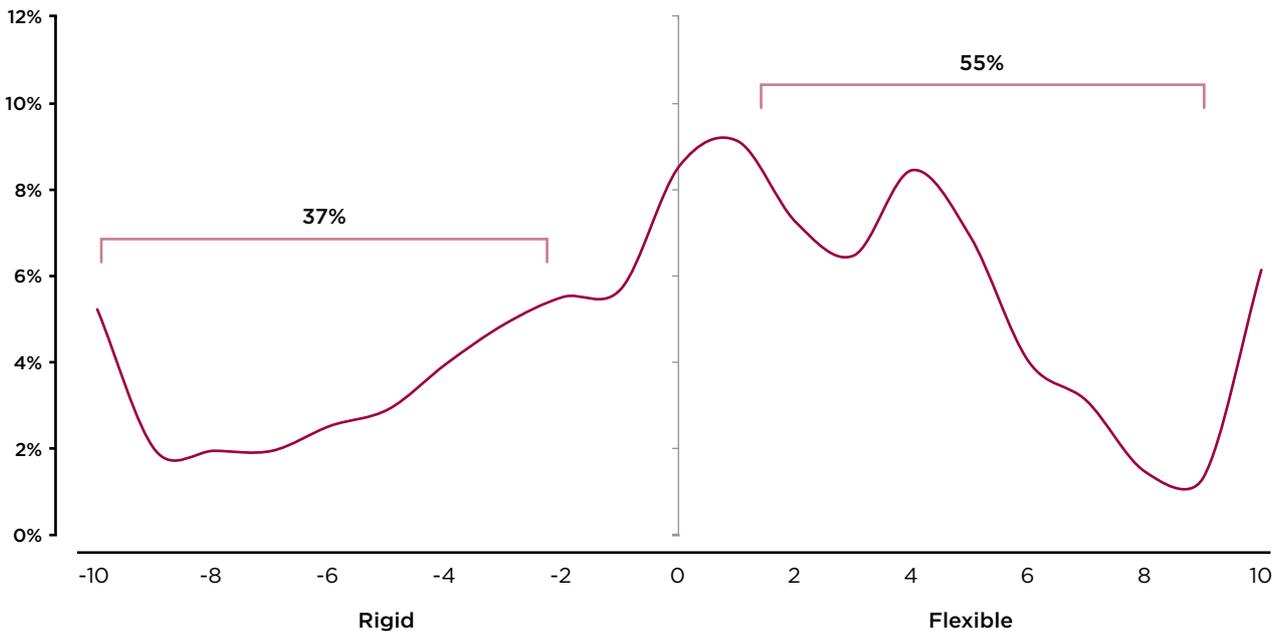


Most people think Britain’s economic position in the world is **neither weak nor strong**, or lean only very slightly in one direction. Conservative voters (69 per cent) and London residents (62 per cent) are the most likely to lean towards ‘strong’.

(Base: Total n = 2,077)
 Voting intention: Con n = 492; Lab n = 582; LD n = 152; Lib n = 221
 Location: London residents n = 276; Non-London residents n = 1,801

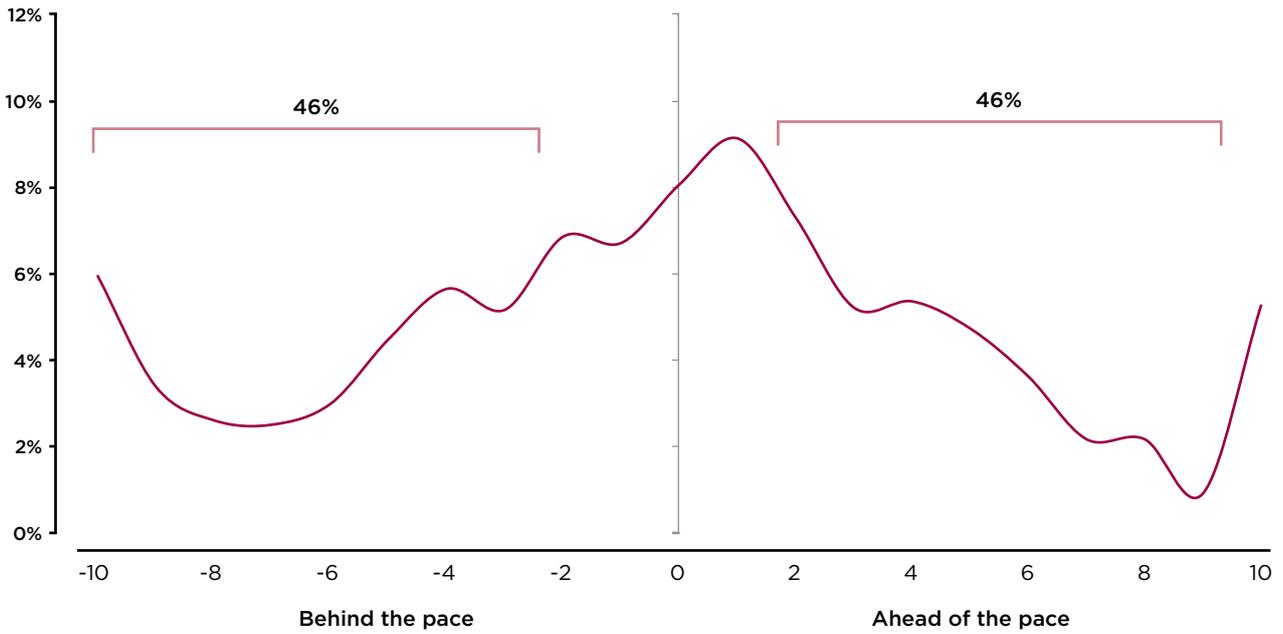


People tend to think that Britain’s economic position in the world is **looking forward**, with 59 per cent more inclined to choose ‘looking forward’ over ‘looking backwards’. This rises to 82 per cent among Conservative voters and 71 per cent among London residents.

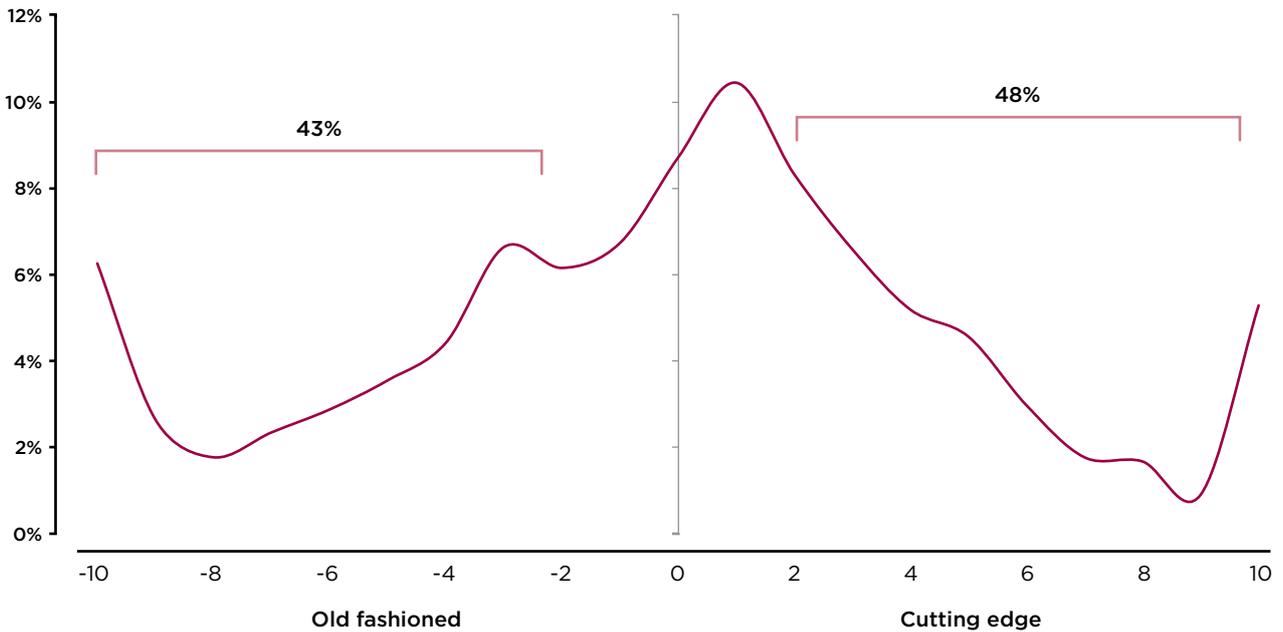


People are more inclined to describe Britain’s economic position in the world as **flexible**, although only a small proportion (9 per cent) lean very strongly (+8 to +10) towards this description. Conservative voters (78 per cent) and London residents (72 per cent) again lean more towards ‘flexible’ than the general population.

(Base: Total n = 2,077)
 Voting intention: Con n = 492; Lab n = 582; LD n = 152; Lib n = 221
 Location: London residents n = 276; Non-London residents n = 1,801

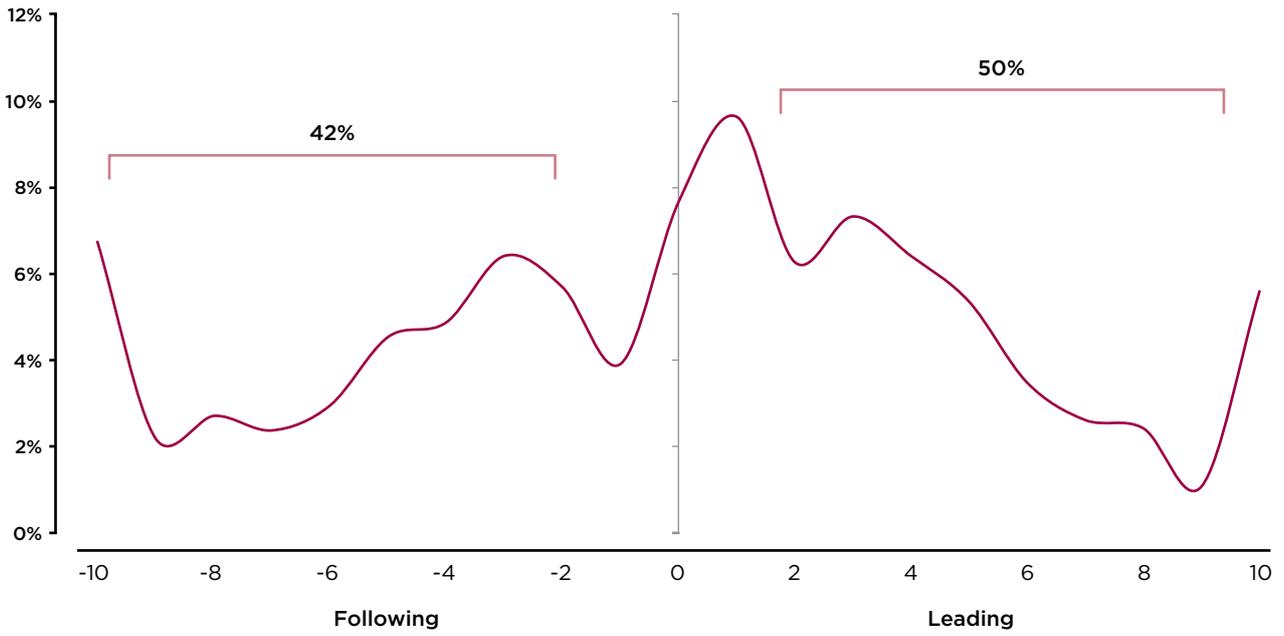


Opinion is divided on whether Britain’s economic position in the world is **ahead of the pace** or behind the pace. Forty-six per cent of people lean towards the former, and another 46 per cent towards the latter. Conservative voters (68 per cent) and London residents (63 per cent) are more likely to think Britain is ‘ahead of the pace’.



Few people have a strong opinion on whether Britain’s economic position in the world is **old fashioned** or **cutting edge**, with most opinion clustered around the middle. Conservative voters (65 per cent) and London residents (62 per cent) are more likely to describe it as ‘cutting edge’.

(Base: Total n = 2,077)
 Voting intention: Con n = 492; Lab n = 582; LD n = 152; Lib n = 221
 Location: London residents n = 276; Non-London residents n = 1,801



People are more inclined to believe that Britain’s economic position in the world is **leading** (50 per cent) than following (42 per cent). This is more pronounced among Conservative (71 per cent and Lib Dem (62 per cent) voters.

(Base: Total n = 2,077)

Voting intention: Con n = 492; Lab n = 582; LD n = 152; Lab n = 221

APPENDIX 2: DEFENDING INNOVATION: ATTACKS AND REBUTTAL DATA

This question tested common attacks against innovation investment and government prioritisation of innovation. The 2,077 sample was split into two, with one half seeing **rebuttal A** for each **attack**, and the other half seeing **rebuttal B** for the same **attacks**.

Q. Which of the following pairs of statements do you find more convincing? The closer you move the slider towards a statement, the stronger you feel towards that statement.

(Base: Split Sample A n = 1,039; Split Sample B n = 1,038)

| Attack | Average (mean) position on sliding scale | Rebuttals |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>"Government doesn't need to be involved in innovation. If government stayed out of it, innovation would happen anyway."</p> | <p>+2.39</p> | <p>A. "Innovation in some areas - like healthcare, education, and infrastructure - needs to be led by government."</p> |
| | <p>+2.56</p> | <p>B. "Businesses alone cannot drive innovation. Money from government is vital to ensure we see ideas through to completion."</p> |
| <p>"It's too risky for government to spend public money on innovation and research projects when we don't know exactly what we'll get from it."</p> | <p>+3.65</p> | <p>A. "The biggest risk is that we don't back British talent with the money and resources it needs to thrive - letting other countries profit from our ideas."</p> |
| | <p>+3.47</p> | <p>B. "Some of the greatest discoveries and inventions have happened by accident, so we need to keep funding innovation even if we can't always predict what will happen."</p> |

| Attack | Average (mean) position on sliding scale | Rebuttals |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><i>“The pace of change is too fast in society to understand the consequences of advances in science and technology.”</i></p> | <p>+3.39</p> | <p>A. <i>“Change often brings benefits - like being able to communicate with friends and family across the world.”</i></p> |
| | <p>+3.79</p> <p>-10 0 -10</p> | <p>B. <i>“Change is unavoidable - we can keep up with the pace of change by investing in things like education and infrastructure.”</i></p> |
| <p><i>“We should focus on immediate problems, like reducing the UK’s debt, and avoid getting distracted by what might happen in ten or 20 years’ time.”</i></p> | <p>+3.13</p> | <p>A. <i>“Our children and grandchildren deserve a future with good job prospects and healthy, peaceful lives. This means planning for the long term.”</i></p> |
| | <p>+2.22</p> <p>-10 0 -10</p> | <p>B. <i>“New ideas and technologies can help us safeguard our future and deal with immediate problems at the same time.”</i></p> |
| <p><i>“Our lives are already too full of new things - we should make better use of what we have.”</i></p> | <p>+3.21</p> | <p>A. <i>“We are running out of existing resources. We need to develop new ideas and technologies to harness those resources.”</i></p> |
| | <p>+3.76</p> <p>-10 0 -10</p> | <p>B. <i>“If humans had never tried to innovate, we would still be living in caves and hunting with sticks.”</i></p> |
| <p><i>“Innovation just increases the differences between the ‘haves’ and the ‘have nots’.”</i></p> | <p>+3.25</p> | <p>A. <i>“Innovation can make the world a smaller place - bringing people together.”</i></p> |
| | <p>+4.03</p> <p>-10 0 -10</p> | <p>B. <i>“Innovation has given more people access to technology by pushing prices down.”</i></p> |

ENDNOTES

1. Tversky, A. and Kahneman, D. (1974) Judgement under Uncertainty: Heuristics and Biases. 'Science.' 27 September 1974. Vol. 185, no.4157, pp. 1124-1131.
2. <http://www.dailymail.co.uk/health/article-2511733/3D-printed-human-hearts-reality-10-YEARS-scientist-claims.html>

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