



The DeHavilland
Predictive Trends Report
2011

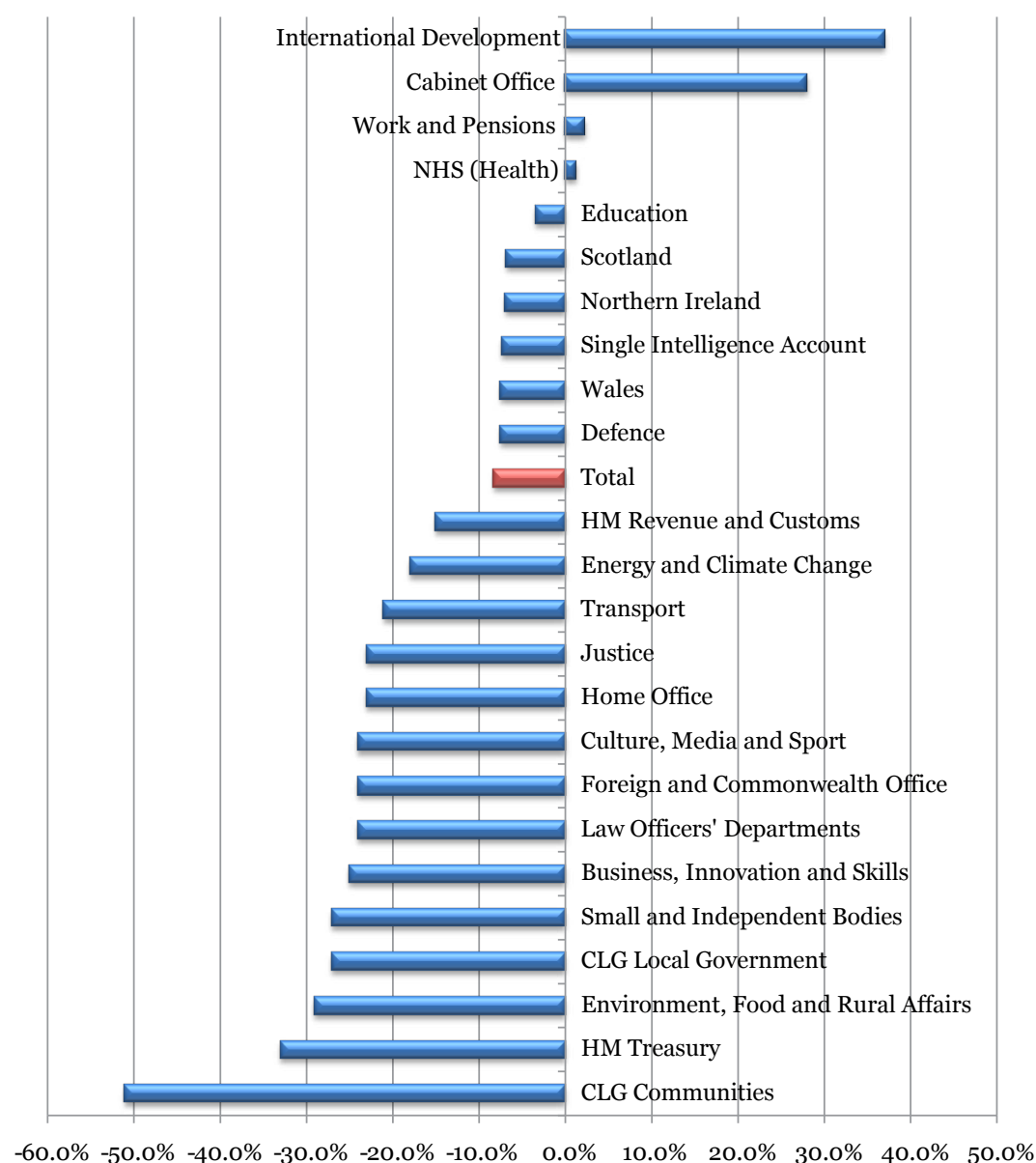
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The Findings of the Comprehensive Spending Review

Chancellor George Osborne made a statement confirming the outcome of the Comprehensive Spending Review on October 20th 2010, setting out the planned spending allocations for each Government department over the next five years (summarised in the table below).

Figure 1:
Budget plans after the Oct 2010 Comprehensive Spending Review, shown in terms of Cumulative Real Growth between 2011 and 2015 for each department. The cuts for all government areas (-8.3%) are highlighted for clarity.



Previous Reports

Shortly before the statement, DeHavilland commissioned a survey to gauge its clients' worries about the potential cutbacks that would be facing them on a professional and personal level as a result of the Coalition Government's shakeup of the country's funding for numerous departments. It found that:

- Overall, respondents were sceptical about the general economic situation, with the majority expecting it to get worse over the next 12 months.
- People tended to be dissatisfied with the Coalition Government's plans for widespread spending cuts, with the vast majority of respondents saying that they expected the cuts to make the country's economic situation worse over the course of the next year.
- Few people suggested that they would be spending more on the services of insight or consultancy firms in the near future, although the largest group claimed that they expected their level of expenditure not to change, with a considerably-sized second group saying they would spend slightly less (in line with generally reduced expenditure on services). This suggested that consultancy groups were likely to remain an important part of many organisations' business plans for the foreseeable future.
- People in all groups were divided on the question of the single biggest thing the Government could do to help their industry, with approximately equal numbers voting for increased funding, increased regulation of industries, decreased bureaucracy and restoration of economic stability. This varied according to the individual category of the respondents, with charities preferring an increase in funding, while businesses hoping instead for a increased regulatory procedures and a return to a more financially-stable state.
- The vast majority of people felt that tax cuts were not a valid solution to the country's economic problems.
- Overall, people expected the Party Conferences, held shortly before the Spending Review statement, to focus on the economic situation in Britain, followed by social policy and David Cameron's 'Big Society', and finally issues of education, often relating to the debates around tuition fees.
- People generally believed that, while economic issues would be covered in great detail at the Party Conferences, the issue of social care would not be discussed in as much detail.
- The corporate sector was generally most interested in questions of the law and social change, and had a wide variety of issues that it felt should be addressed at the Party Conference. Charitable organisations were very much interested in the financial state of the country, more than any other overall. They were very wary of cuts in the Comprehensive Spending Review.
- Membership organisations and trade unions tended to match up reasonably closely to overall trends, showing a great deal of concern for social programs, education strategies and Britain's monetary situation. They also had a wide variety of different issues about which they were concerned, much like the corporate sector.
- The public sector was the only section of those sampled who seemed particularly worried about the state of Arts funding in the UK. Funding was a big concern for this sector, although social issues were also seen as being particularly important.

Methodology

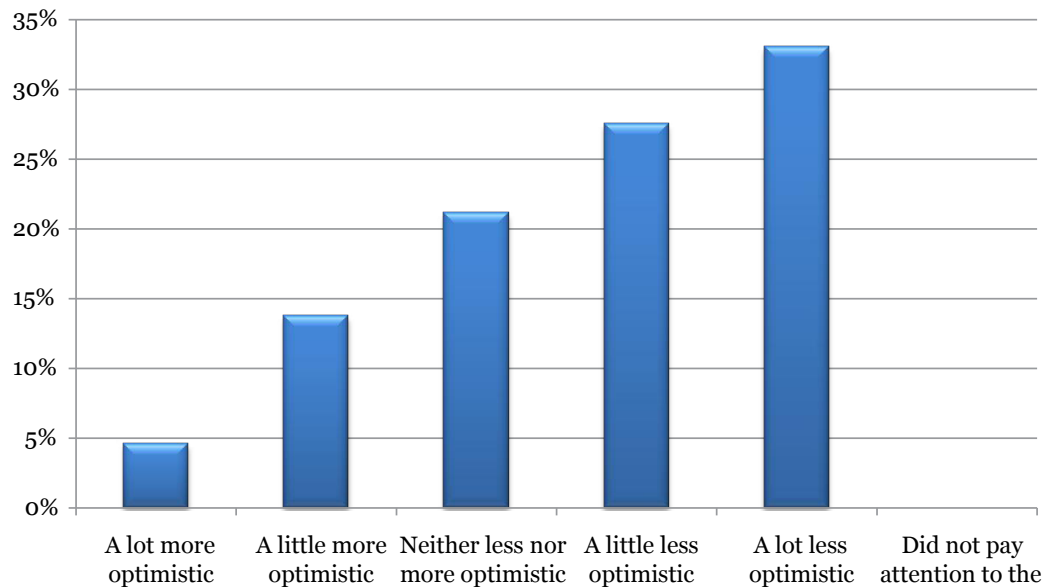
The February 2011 DeHavilland Report is based on the results of a survey commissioned and performed by DeHavilland in January of the same year, and sent out to more than 4,000 clients via email and social media networks (including Twitter and LinkedIn). Respondents were asked to categorise their organisation in one of five groups, after which the data was anonymised. Of the 109 respondents, 19 described their organisation as a charity, 24 as a consultancy group, 24 as part of the corporate sector, 18 as a membership organisation or a trade union, and 24 as part of the public sector. It is these response rates that are used in calculating the percentages shown on the following pages.

Question 1:

‘Post-Comprehensive Spending Review, how optimistic/pessimistic do you feel about the country’s economy over the next 12 months?’

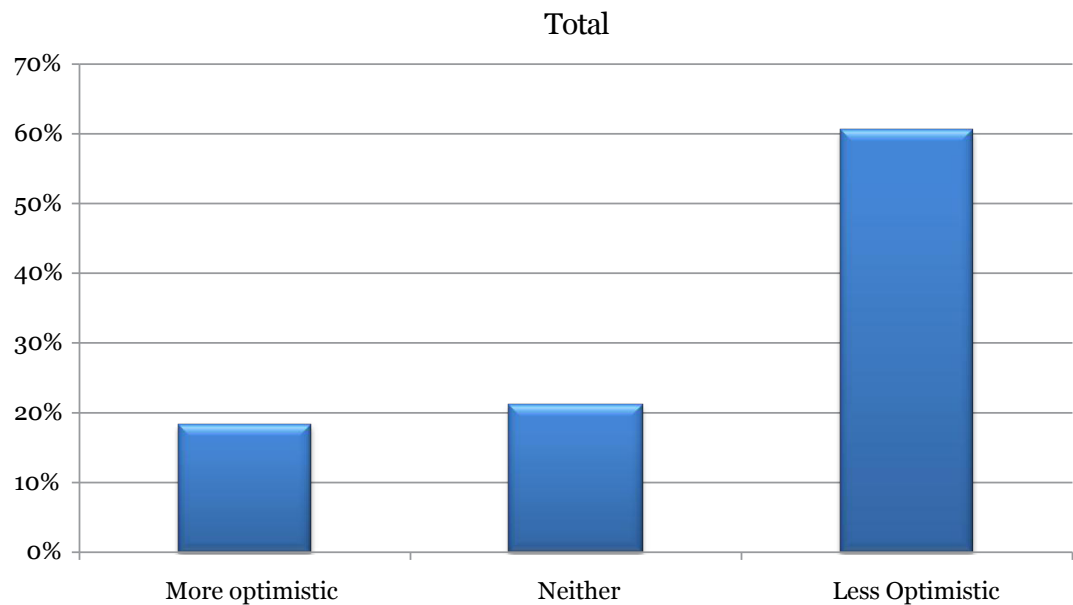
General

Figure 2:
Responses to the question ‘Post-Comprehensive Spending Review, how optimistic/pessimistic do you feel about the country’s economy over the next 12 months?’.



When asked how optimistic they felt regarding the state of the country’s economy in the light of last October’s Comprehensive Spending Review, the majority of respondents believed the situation would get worse over the next year, with one in three saying they had become less optimistic about the situation since the CSR was released, and a further 28% saying they were a little less optimistic. Only 5% of respondents described themselves as being a lot more optimistic about the economy since the CSR, with a further 14% describing themselves as slightly more optimistic.

Figure 3:
Responses to the question
'Post-Comprehensive
Spending Review, how
optimistic/pessimistic
do you feel about the
country's economy over
the next 12 months?',
collected by positive/
negative responses.

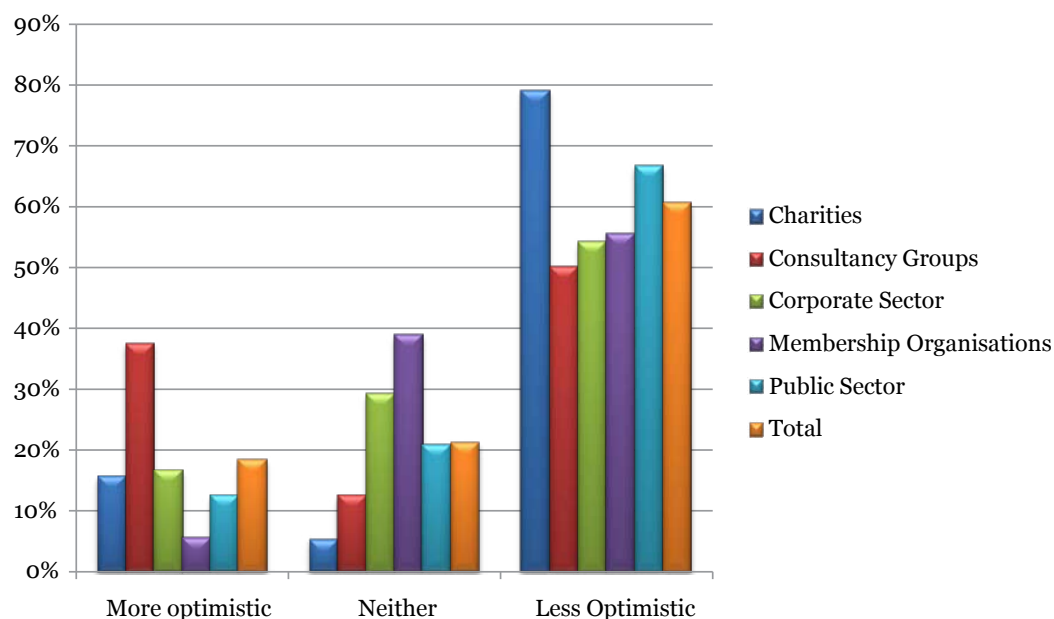


When taken as an aggregate total, more than six out of ten respondents were less optimistic about the state of the nation’s economy now compared to how they felt before the results of the CSR were made available last year. Only 18% -- fewer than one in five – respondents were more optimistic about the economy than they were last year, expecting it to improve (or at least, to decline less severely) over the course of 2011., 21% of respondents stated that they felt neither more nor less optimistic about the nation’s finances since the release of the Comprehensive Spending Review.

Despite it being an available option, none of the respondents described themselves as having no opinion or having not paid attention to the CSR.

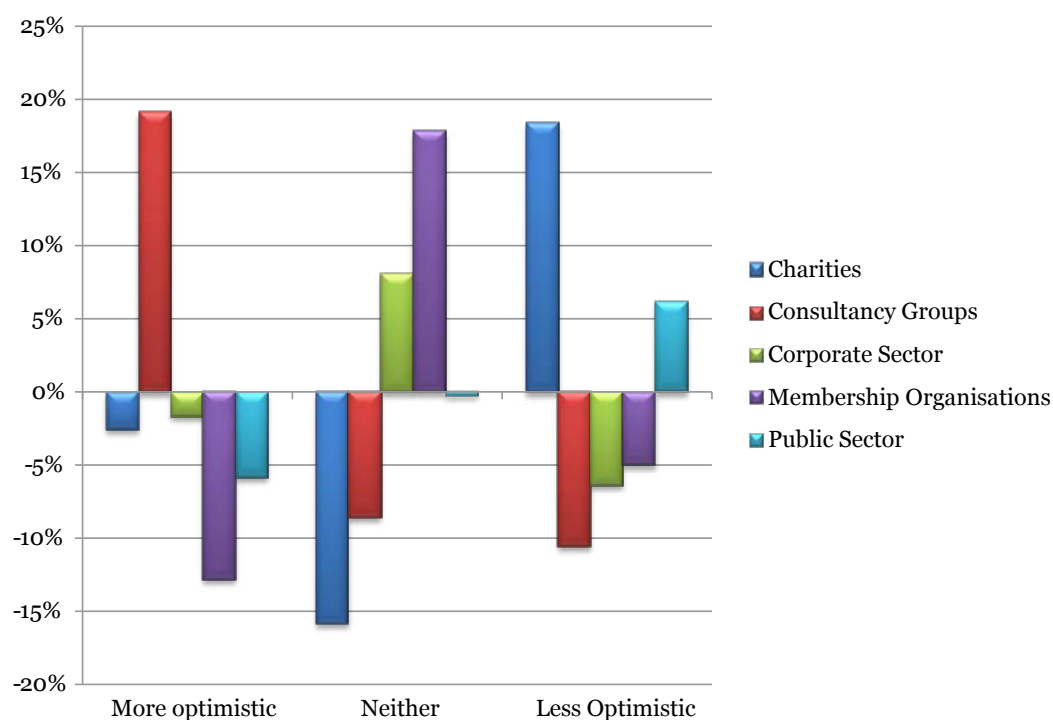
By Sector

Figure 4:
Responses to the question
'Post-Comprehensive
Spending Review, how
optimistic/pessimistic
do you feel about the
country's economy over
the next 12 months?',
separated by sector.



This data shows disparity between the five organisation types surveyed with regards to the whether they were more or less optimistic about the state of the nation's economy in 2011. Each group had a higher percentage of respondents who felt either less optimistic or no more optimistic than felt more optimistic since DeHavilland's 2010 State of the Nation Report came out. However, some groups – charities and consultancy groups – were more likely to suggest that they felt more optimistic than unchanged in their optimism, despite the fact that charities especially were resoundingly less optimistic overall. As such (and as can be seen in the chart below), it seems that charities and consultancy groups were much more convinced that the CSR would have some effect – either positive or negative – than other organisations.

Figure 5:
Responses to the question
'Post-Comprehensive
Spending Review, how
optimistic/pessimistic
do you feel about the
country's economy over
the next 12 months?',
separated by sector and
displayed as percentage
variation from the average
of all responses.



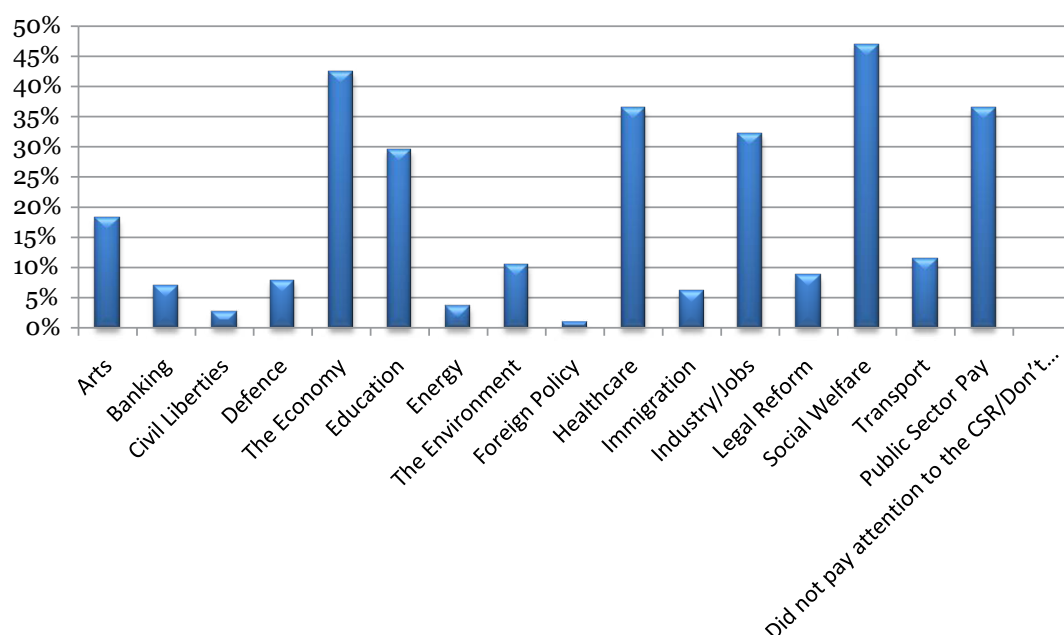
As can be seen in the above chart, which tracks the variance from the average of each group's responses to the question, respondents who described themselves as being part of a consultancy group are the only ones who are (on average) more likely to be more optimistic about the nation's economy since the publication of the CSR. In terms of scale, the difference is significant, with 19% more respondents than would be expected given the total average selecting this as their answer. Similarly, charities were significantly more likely than average to be pessimistic about the changes brought about by the Comprehensive Spending Review, with a +18% swing compared to the average; along with the public sector's tend towards the less-optimistic vote, this can perhaps be ascribed to the perception that the CSR will result in cuts to non-corporate groups.

Question 2:

‘Post-CSR, which areas of Government policy do you feel will face the biggest challenges in 2011?’

General

Figure 6:
Responses to the question
‘Post-CSR, which areas of
Government policy do you
feel will face the biggest
challenges in 2011?’



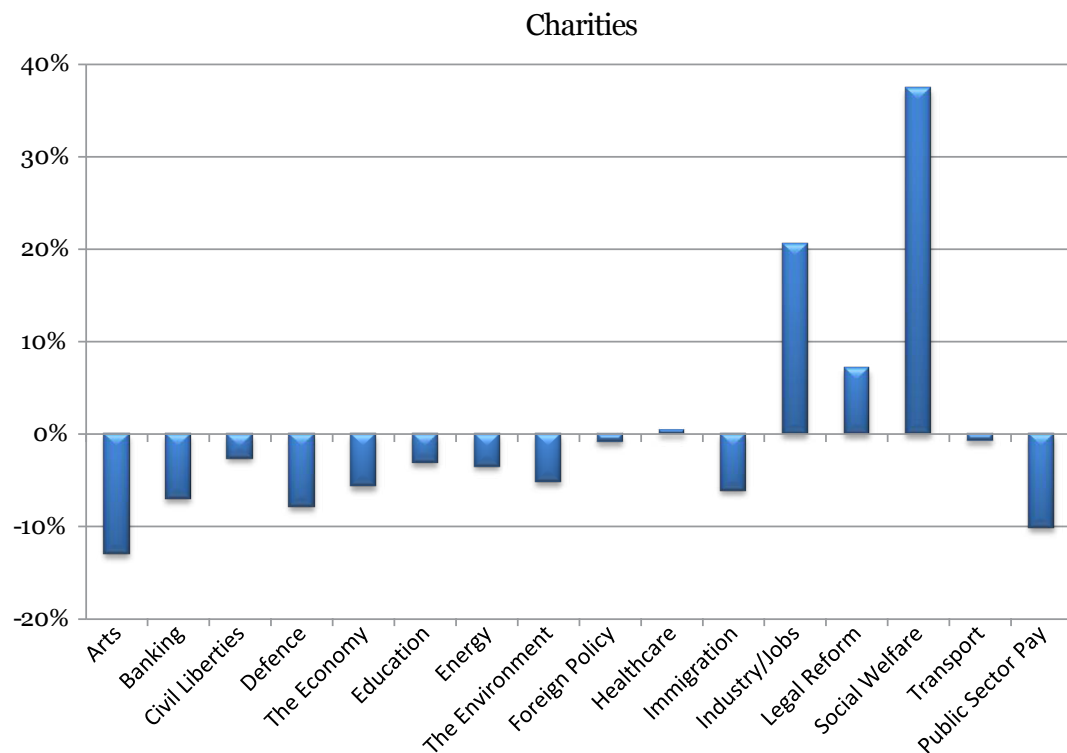
Respondents were asked to select up to three areas of government policy that would be subject to the biggest challenges in the rest of 2011. Of these, social welfare received the most votes (with almost half of respondents selecting it as a point of concern), with the economy in second place and public sector pay and healthcare trailing just behind. Overall, foreign policy, energy policy and civil liberties were not expected to face the same degree of challenge over the next year.

As was the case in the answers to Question 1, not a single respondent used one of their three votes for ‘don’t know’ or ‘did not pay attention to the CSR’.

By Sector

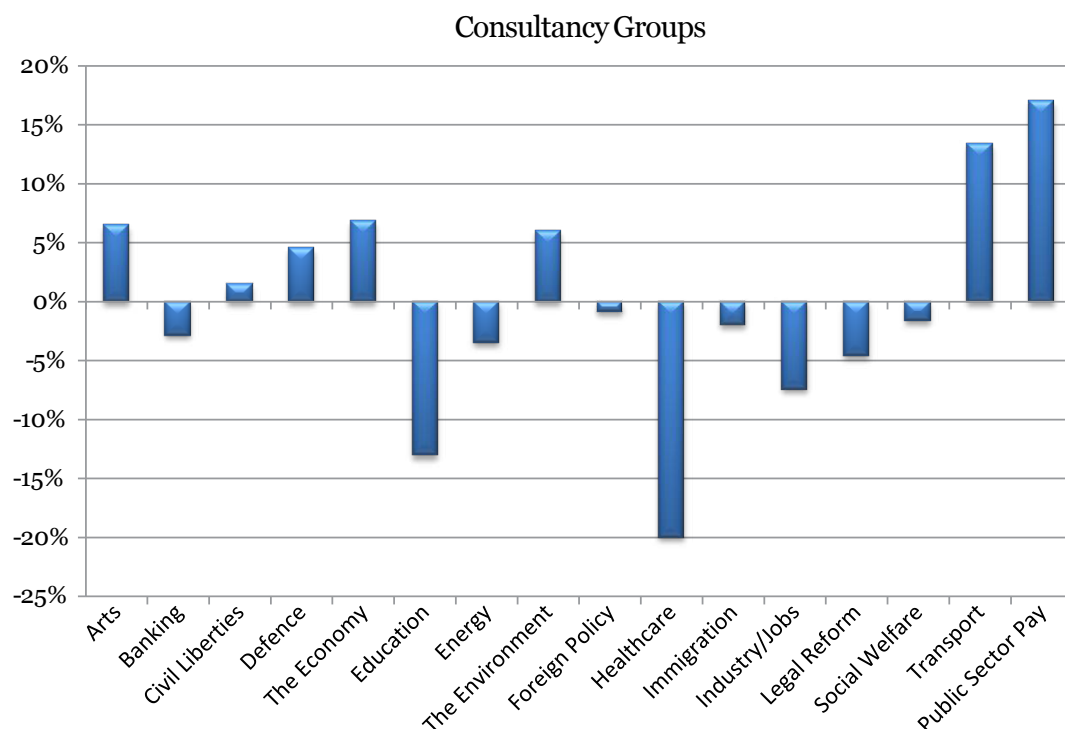
Taking the organisations surveyed on a category-by-category basis, it is possible to determine which had a significant variation from the average response (shown in the above chart).

Figure 7:
Charitable organisations' responses to the question 'Post-CSR, which areas of Government policy do you feel will face the biggest challenges in 2011?'



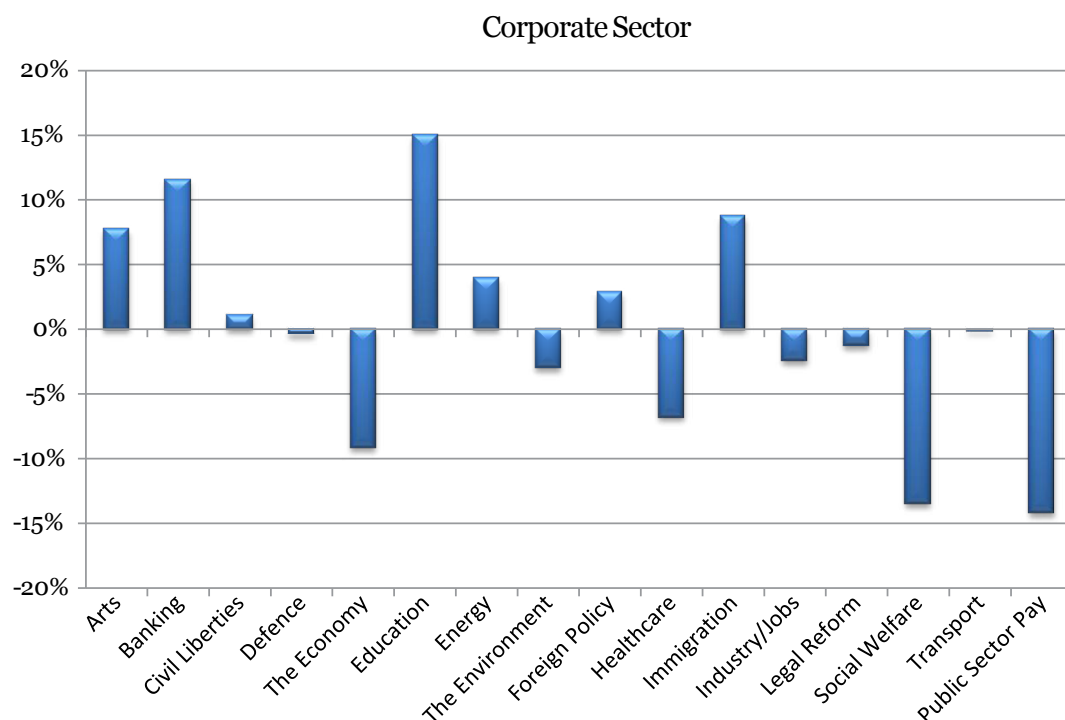
Key areas of concern for charitable organisations include industry and jobs, legal reform, and the country's social welfare programs: in fact, at +37%, the shift in concern about social welfare funding by charitable organisations was by far the biggest deviation from the average recorded. On the other end of the scale, there is no significant variation from the average with regards to government policy categories that didn't receive votes from representatives of the charities surveyed, with none particularly standing out as being ignored by charitable organisations in terms of having excessive difficulties in the near future.

Figure 8:
Consultancy groups' responses to the question 'Post-CSR, which areas of Government policy do you feel will face the biggest challenges in 2011?'



For consultancy groups, key areas of concern include the nation's transport infrastructure and issues regarding public sector pay and pensions. Funding for the arts and issues with the economy, the environment, defence and civil liberties were also slightly higher than average. Consultancy groups were (generally speaking) significantly less convinced than the average that healthcare would suffer in terms of financial provision as a result of the CSR during 2011, with 20% fewer votes than when the figures are compared with the total. As it stands, the NHS is one of only four government departments to have had its planned budget raised over the next five years by the CSR (although budget reductions are still planned, as shown in Figure 1).

Figure 9:
Corporate sector groups' responses to the question 'Post-CSR, which areas of Government policy do you feel will face the biggest challenges in 2011?'



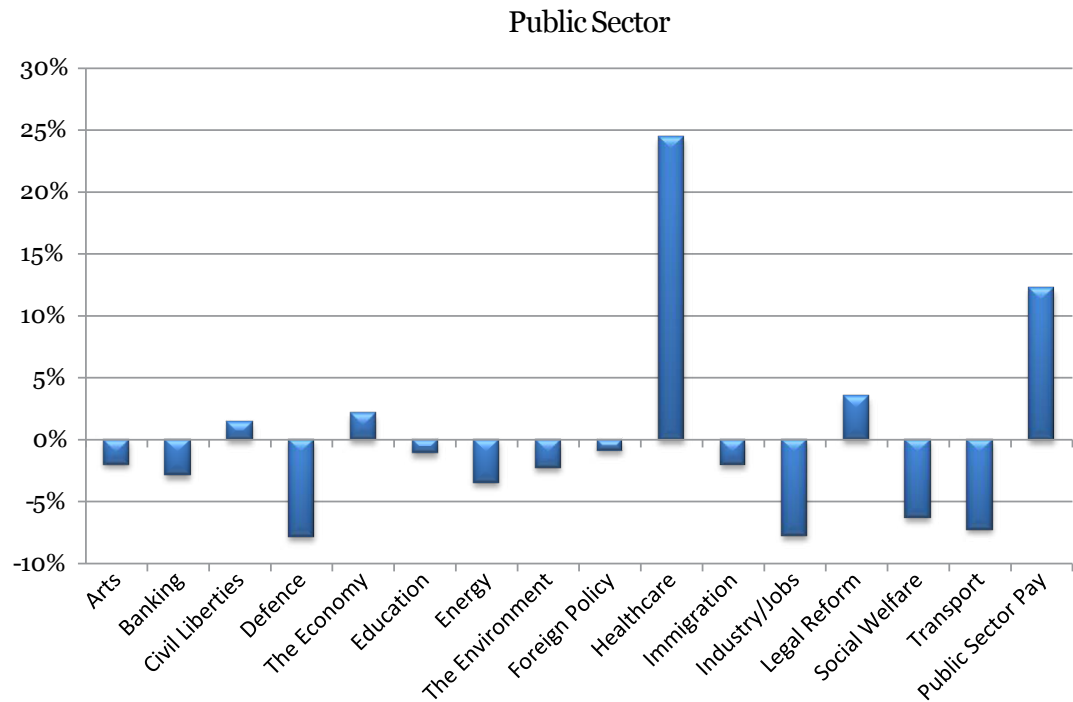
Respondents in this sector felt that the biggest challenges of the next twelve months would be in the education system, immigration services and banking infrastructure, with worries about the arts ranking fourth, a sign that this is a policy area of concern not just to the public sector and the third sector. As would be expected, public sector pay was less of a concern for this sector, and had the biggest drop-off in votes compared to the average, with 14% fewer respondents selecting it as their answer than in other groups. Even here, however it is worth noting that unlike the public sector, charities and consultancy groups, the responses of the corporate sector did not vary too significantly from the average in this case.

Figure 10:
Membership organisations' responses to the question 'Post-CSR, which areas of Government policy do you feel will face the biggest challenges in 2011?'



Respondents who classed themselves as being part of a membership organisation or trade union stated that they believed the biggest challenges of the coming year would be found in Defence policy, with the economy and energy policies ranking equal-second. Issues surrounding the environment, healthcare and the provision of jobs in the industrial sector were also considered to be higher than average in terms of future difficulty, but (as with the corporate sector) there was a relatively high degree of correlation with the average survey results, implying that the replies given by membership organisations are – in this case at least – fairly well-matched with the wider data pool.

Figure 11:
Public sector groups’
responses to the question
‘Post-CSR, which areas of
Government policy do you
feel will face the biggest
challenges in 2011?’



Respondents from the public sector felt extraordinarily strongly that issues impacting on the nation’s healthcare system would cause the biggest challenges through 2011 (with 24% more people counting that as being one of the top three areas for concern than other groups), with public sector pay and pension changes ranked second – understandably, given the particular and very specific nature of the issue at hand. As was the case with membership organisations in the above chart, public sector respondents generally don’t feel too much more strongly than average that particular policy sections will not undergo severe difficulties in the coming months.

Figure 12:
Comparison chart
showing the percentage
difference from the average
of respondents' answers to
Question 2. Red-shaded
cells indicate which groups
are less concerned than
the average by category;
blue-shaded cells indicate
higher-than-average
concern.

Issues	Charities	Consultancy Groups	Corporate Sector	Membership Organisations	Public Sector
Arts	-13%	6%	8%	-3%	-2%
Banking	-7%	-3%	12%	-2%	-3%
Civil Liberties	-3%	2%	1%	-3%	1%
Defence	-8%	5%	0%	12%	-8%
The Economy	-6%	7%	-9%	7%	2%
Education	-3%	-13%	15%	0%	-1%
Energy	-3%	-3%	4%	6%	-3%
The Environment	-5%	6%	-3%	4%	-2%
Foreign Policy	-1%	-1%	3%	-1%	-1%
Healthcare	0%	-20%	-7%	3%	24%
Immigration	-6%	-2%	9%	-1%	-2%
Industry/Jobs	21%	-7%	-2%	2%	-8%
Legal Reform	7%	-5%	-1%	-4%	3%
Social Welfare	37%	-2%	-13%	-7%	-6%
Transport	-1%	13%	0%	-6%	-7%
Public Sector Pay	-10%	17%	-14%	-7%	12%

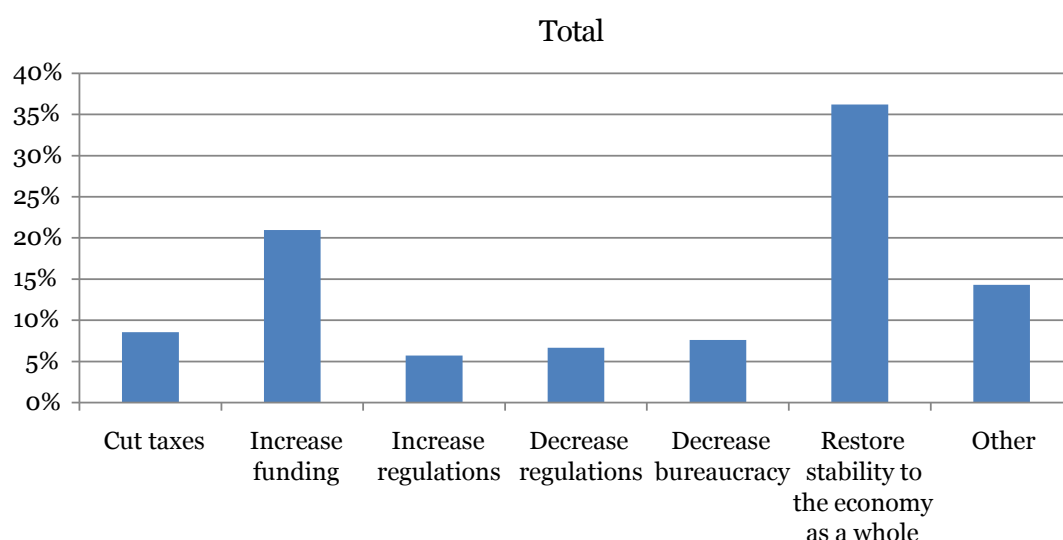
Question 3:

‘In order to further the aims of your organisation, what would you say is the single biggest change the Coalition Government could make in 2011?’

General

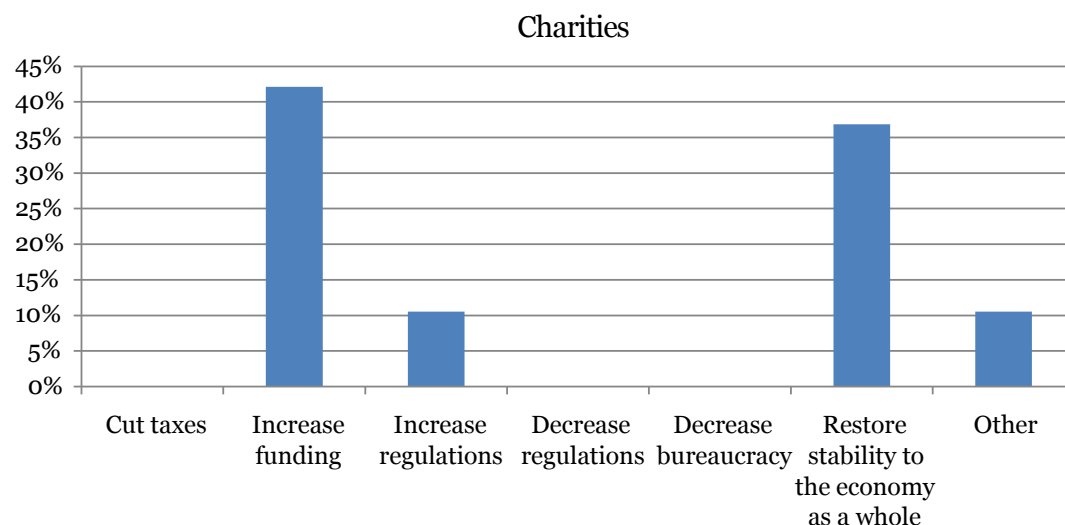
Figure 13:

Responses to the question ‘In order to further the aims of your organisation, what would you say is the single biggest change the Coalition Government could make in 2011?’



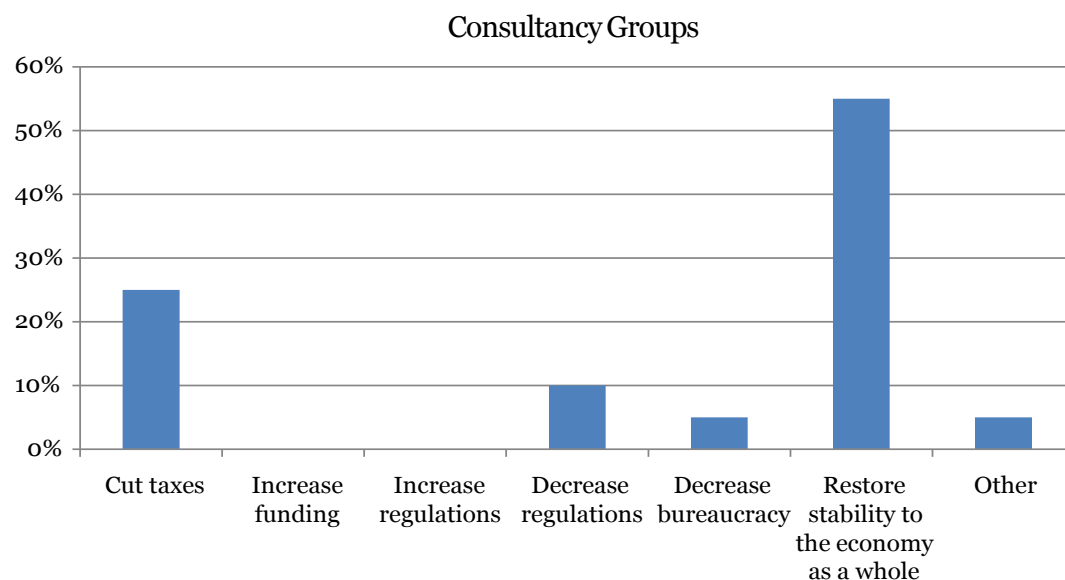
There was a strong preference for action to address the wider picture from our respondents: when asked for the single biggest change that would improve their organisation’s ability to function effectively, more than a third went with ‘Restore stability the economy as a whole’, rather than choosing individually- or specifically- beneficially changes to the current system. However, more than one in five selected an increase in funding – a significant total, showing how many are specifically concerned about their own organisation’s direct relationship to Government.

Figure 14:
Charitable organisations' responses to the question 'In order to further the aims of your organisation, what would you say is the single biggest change the Coalition Government could make in 2011?'



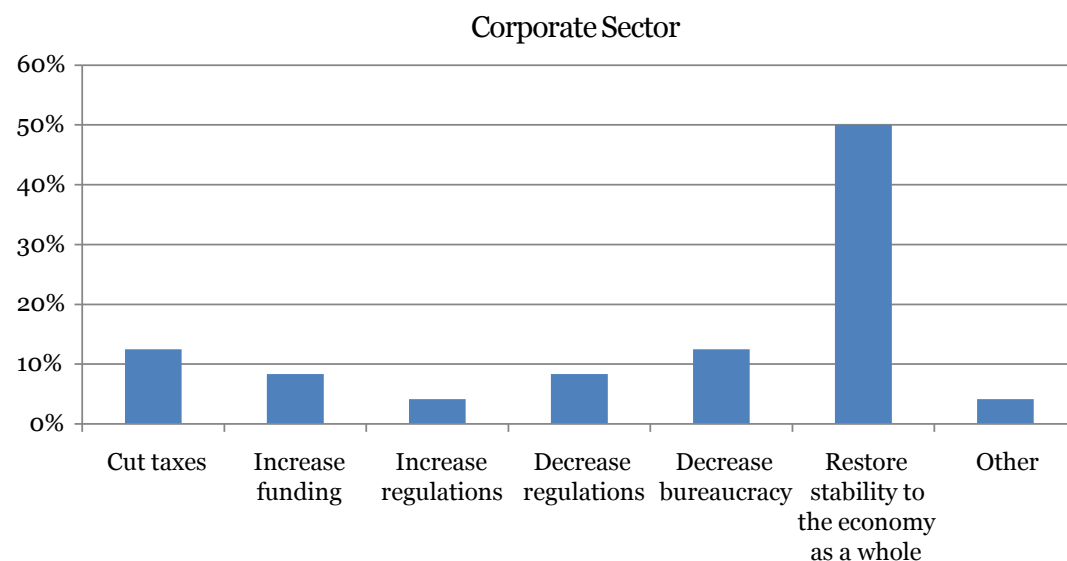
As might be expected, charitable organisations voted heavily in favour of increased funding, with more than four out of ten suggesting it would be the single biggest thing that could help their organisation to flourish in the coming year. The charitable sector was the only category that didn't call for either a decrease in regulations or a decrease in bureaucracy, two things often cited by policy makers as standing in the way of charities functioning at maximum effectiveness. However, it seems that financial worries are taking up much of the available concern in the sector: respondents who advocated increased funding and an increase in overall financial security together make up 79% of the vote.

Figure 15:
Consultancy groups' responses to the question 'In order to further the aims of your organisation, what would you say is the single biggest change the Coalition Government could make in 2011?'



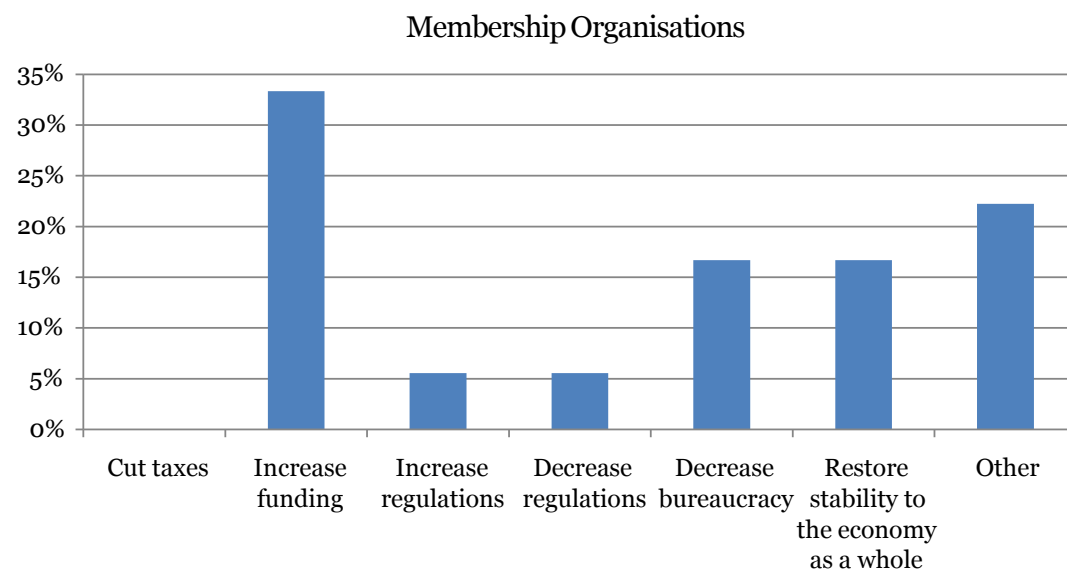
As expected, consultancy groups were the least likely to suggest that the answer to problems in their business model could be solved by an increase in funding. Instead, restoring overall stability swept the vote, with 55% selecting it as their response – more than any other answer in any other category. Consultancy groups also had the highest call for a cut in taxes, with one in four suggesting that it would help to streamline their business more than anything else.

Figure 16:
Corporate sector groups' responses to the question 'In order to further the aims of your organisation, what would you say is the single biggest change the Coalition Government could make in 2011?'



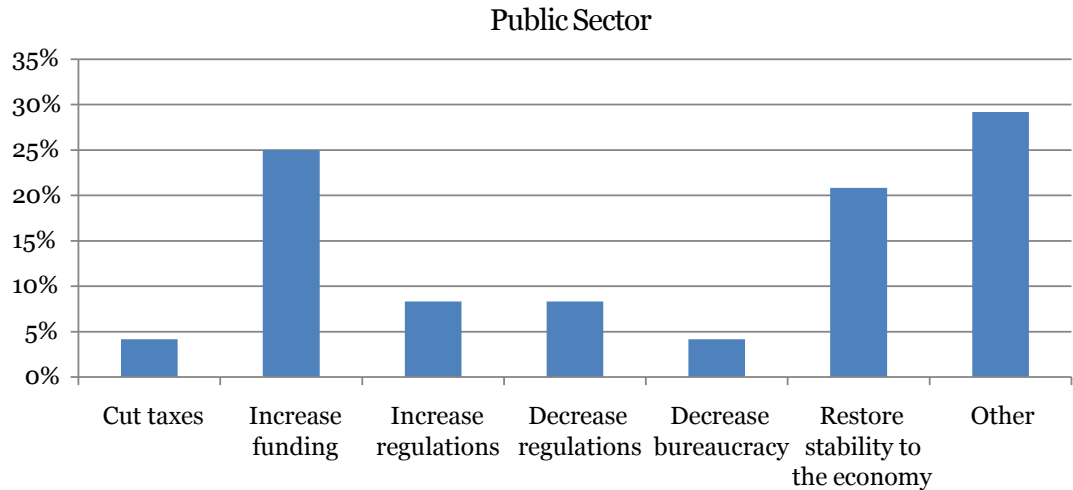
As with consultancy groups, the corporate sector expressed a notable preference for plans to restore stability to the economy as a whole, rather than more specific changes to regulatory procedure and bureaucracy. With half of respondents here selecting it – and more than that, if the two business-for-profit sectors are combined into one group – it is clear that the currently shaky state of the UK's economy is still resting heavily on people's minds, and a wider, more all-encompassing and hopefully long-lasting fix seems to be the preferred solution over individually beneficial changes.

Figure 17:
Membership organisations' responses to the question 'In order to further the aims of your organisation, what would you say is the single biggest change the Coalition Government could make in 2011?'



As with charities, calls for increased funding took the lead over restoration of wider economic stability (by an even wider margin), but membership organisations were one of two groups that most heavily utilised the option for 'other' on the survey, the other being public sector workers. Alternative suggestions were varied, but included leaving the European Union, slowing planned health reforms, creating a credible plan for a national infrastructure that would streamline building and engineering projects, and promoting effective access to justice for those who need it most.

Figure 18:
Public sector groups’
responses to the question
‘In order to further the
aims of your organisation,
what would you say is the
single biggest change the
Coalition Government
could make in 2011?’

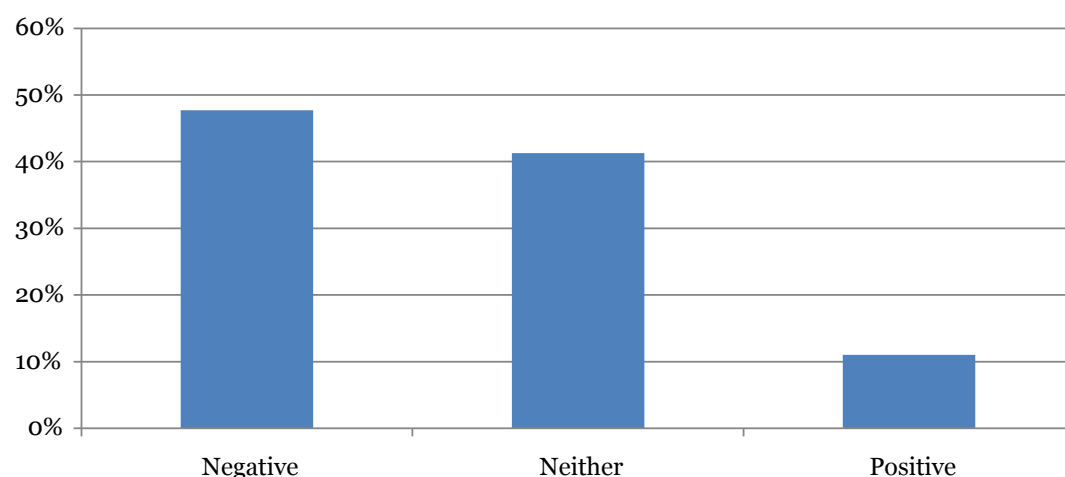


With one in four respondents in the public sector stating that increased funding would be of most use to their organisation, it seems clear that worries about departmental funding cuts are seen as a large problem. Similarly, although suggestions from public sector organisations were varied, but time and again the issue was raised about stemming the tide of cutbacks (and even, in some cases, not abolishing specific government-run departments). Other suggestions included listening more closely to the advice of experts, increasing the regularity of regulatory decisions and changes, increasing the supply of housing to help get the market back on its feet (along with people struggling to make a purchase or find suitable rented/council-run accommodation), and prioritising vocational education in order to help ensure that young people were capable of getting a foothold in the workplace after leaving school. The wide array of open responses indicates the sheer variety of organisations classed as being part of the public sector, and the specificity needed to ensure that they were all able to run independently and under what is likely to be lower budgets since the adoption of the CSR.

Question 4: 'Do you think the upcoming Spring Budget will have a positive or negative impact on your organisation in 2011?'

General

Figure 19:
Responses to the question
'Do you think the
upcoming Spring Budget
will have a positive or
negative impact on your
organisation in 2011?'



When asked what they thought the effect the Spring Budget (due on March 23rd, 2011) would have on their organisation, a plurality of respondents (almost half) felt that it would have a negative effect overall. Only one in nine of those surveyed felt that it would have a positive effect on their organisation – numbers that tally loosely with the results of Question 1, indicating a general feeling amongst those surveyed that the financial plans of the Conservative-Liberal Democrat coalition since the CSR will cause quite a pinch before positive change is likely to come about.

By Sector

When taken sector by sector, it is easy to see an often significant variation in expectations for the Spring Budget.

Figure 20:

Responses to the question 'Do you think the upcoming Spring Budget will have a positive or negative impact on your organisation in 2011?', separated by organisation type

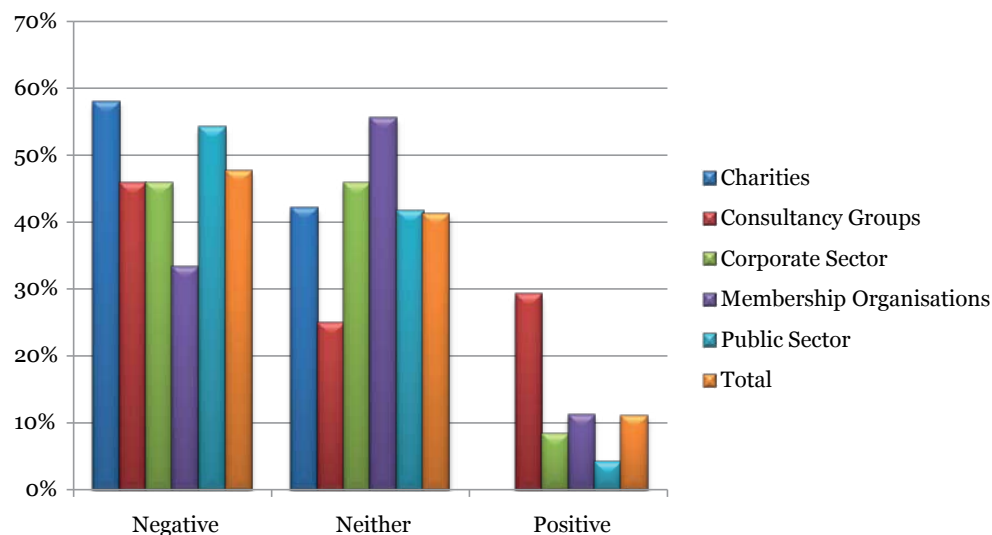
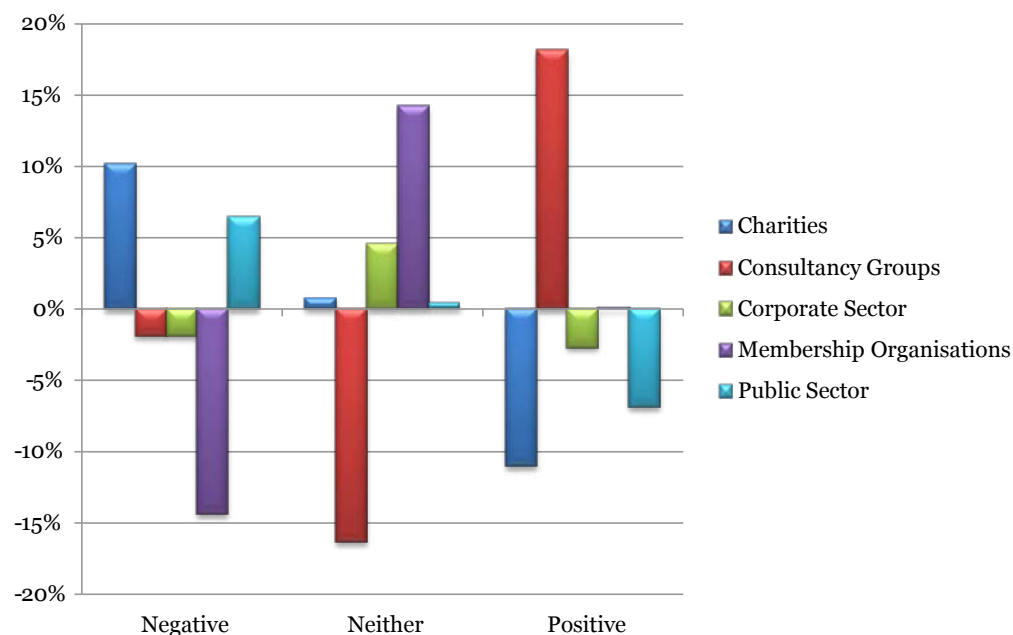


Figure 21:

Responses to the question 'Do you think the upcoming Spring Budget will have a positive or negative impact on your organisation in 2011?', separated by organisation type and displayed as percentage variance from the total average

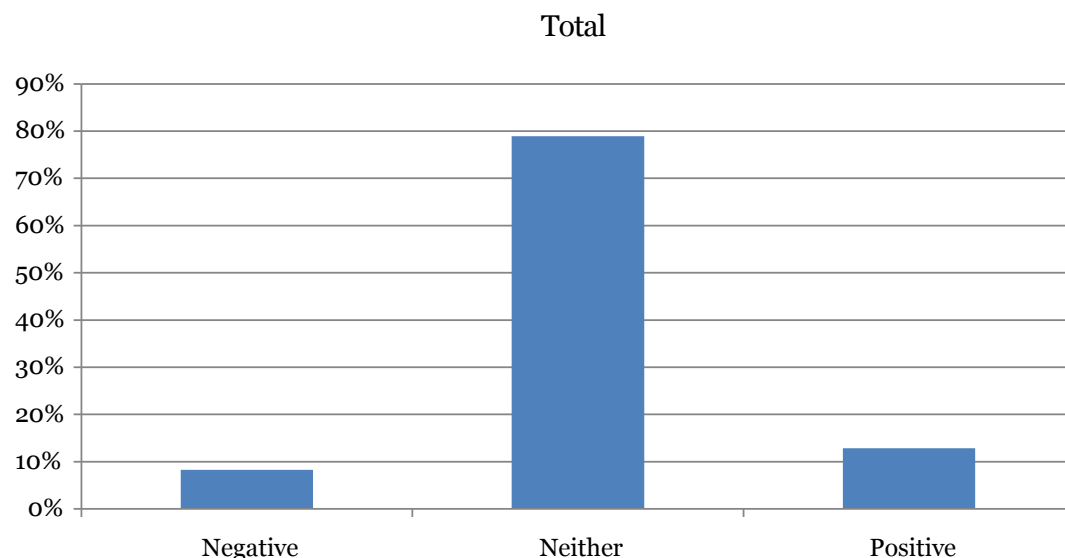


As can be seen in the above chart, public sector workers and those responsible for charitable organisations voted more often than the average that they expected the Spring Budget to have a negative effect on their organisation. On the other hand, consultancy groups were the only group more likely than average to feel that there would be a positive swing for their organisation after March 23rd, and were significantly less likely than the average to suggest that the budget would have neither a positive nor a negative effect on their business. Membership organisations were generally the most balanced of the groups, with a +14% swing towards 'neither positive nor negative' when compared to the average (with as many of 55% of respondents selecting this as their answer).

Question 5: 'Do you think the upcoming Local Government elections will have a positive or negative impact on your organisation in 2011?'

General

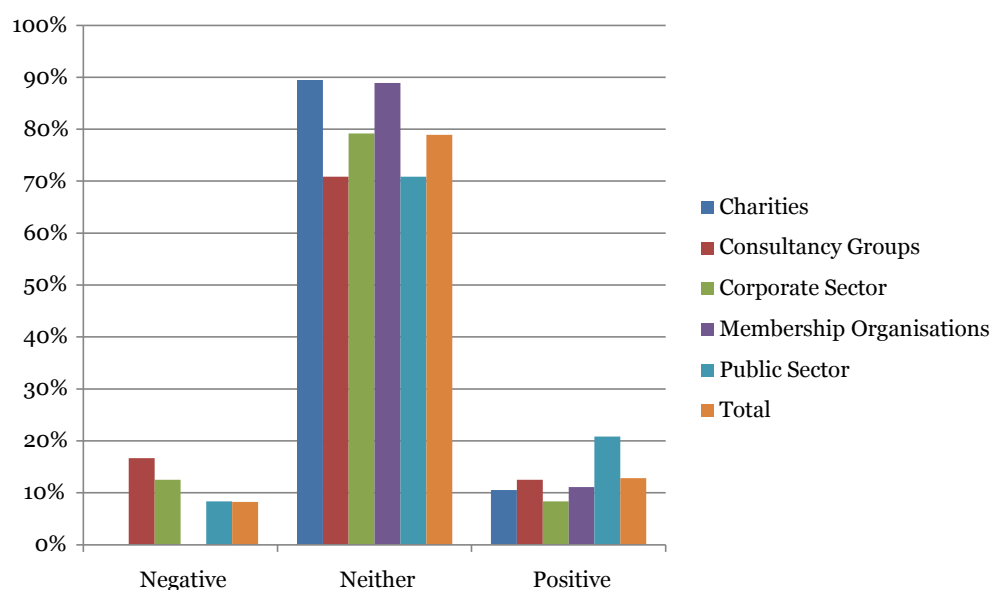
Figure 22:
Responses to the
question 'Do you
think the upcoming
Local Government
elections will have a
positive or negative
impact on your
organisation in 2011?'



Unlike the earlier question about the Spring Budget (which was generally believed is likely to have a negative effect on respondents' organisations), the Local Government elections coming up in May are widely expected to have little impact on individual organisations. Almost four out of five respondents stated that they thought the elections would have neither a positive nor a negative effect on their organisation over the course of 2011. There is also a slight increase in the number of respondents who suggested there would be a positive impact as a result of the Local Government elections when compared to the average. It is reasonable to say that this tells us more about the national focus of those surveyed than the overall importance of local policy making. Clearly, many small and medium-sized enterprises and local charities will be keenly anticipating the first local elections to follow widespread reforms to this part of Government.

By Sector

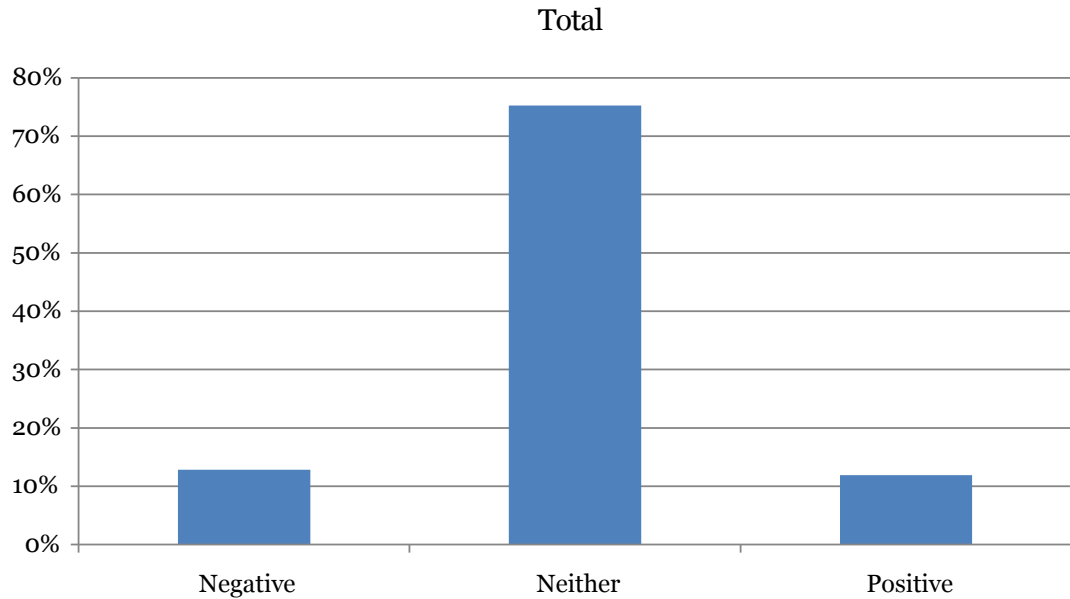
Figure 23:
Responses to the question 'Do you think the upcoming Local Government elections will have a positive or negative impact on your organisation in 2011?', separated by organisation type



When divided by organisation type, a similar pattern emerges. Although no charities or membership organisations expected that the Local Government elections would have a negative effect on their organisation, most of the responses are still clumped very close together in the 'neither positive nor negative' category, indicating a high degree of similarity across all five groups in their opinions on the subject.

Question 6:
‘Do you think the upcoming UK elections
for Wales, Scotland and Northern
Ireland will have a positive or negative
impact on your organisation in 2011?’
General

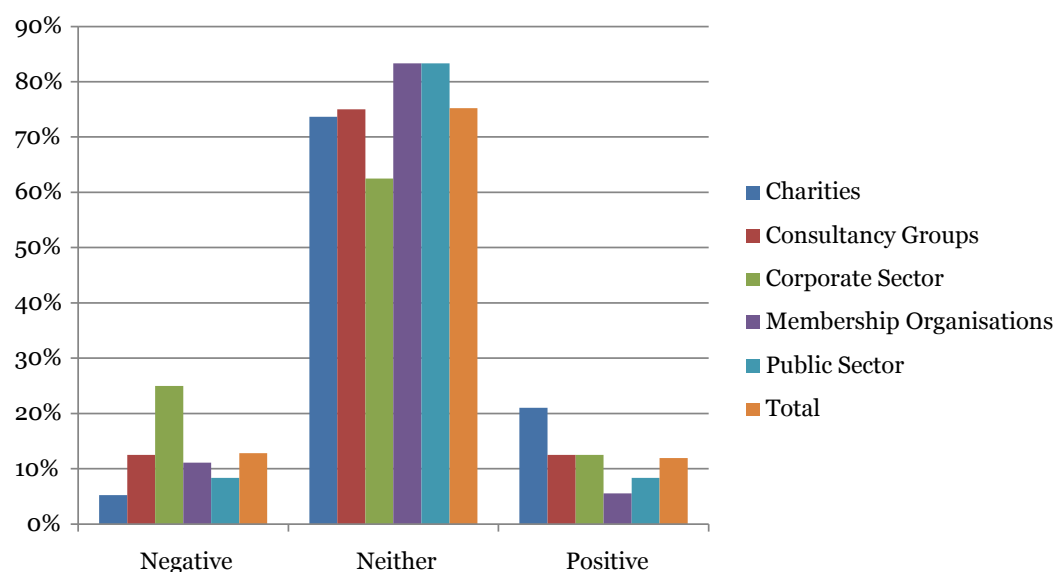
Figure 24:
Responses to the
question ‘Do you
think the upcoming
UK elections for Wales,
Scotland and Northern
Ireland will have a positive
or negative impact on your
organisation in 2011?’



As with the results of Question 5, respondents overwhelmingly believed that the UK elections for Wales, Scotland and Northern Ireland would have neither a positive nor a negative effect on their organisations in 2011, with as many as three out of four choosing that as their answer. Similarly, responses suggesting a negative impact and a positive impact respectively were both a) roughly equal in size when compared to each other and b) very close to the number of responses given to the previous question.

By Sector

Figure 25:
Responses to the
question 'Do you
think the upcoming
UK elections for Wales,
Scotland and Northern
Ireland will have a positive
or negative impact on your
organisation in 2011?'

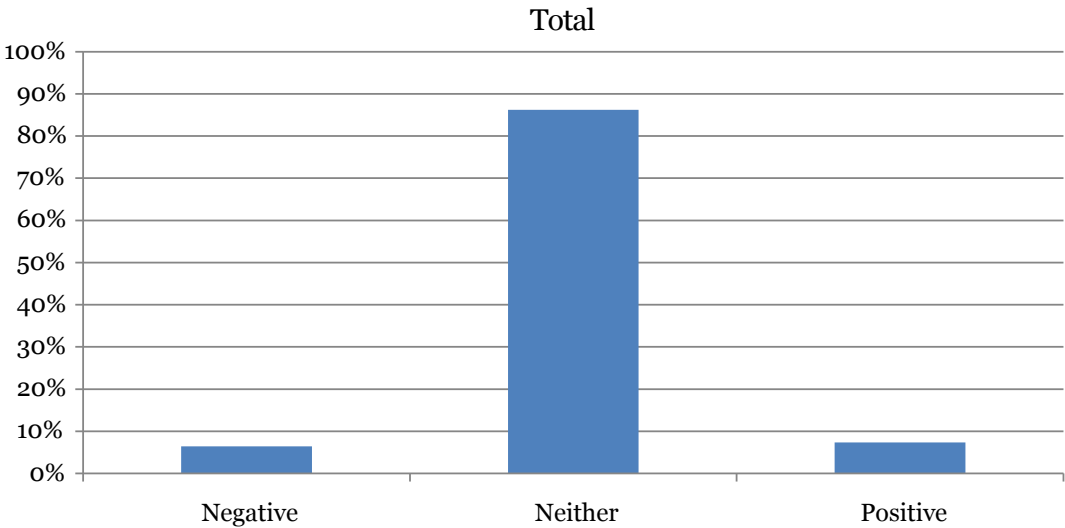


When divided by sector, a similar pattern emerges to Question 6, with few clear diversions from the average. This time, it is charities that are more likely to feel positive and the corporate sector that is significantly more likely to feel negative about the impact the elections will have on their organisation, but there is a clear trend towards the middle option for all groups.

Question 7:
‘Do you think the upcoming referendum
on an alternative voting structure will
have a positive or negative impact on
your organisation in 2011?’

General

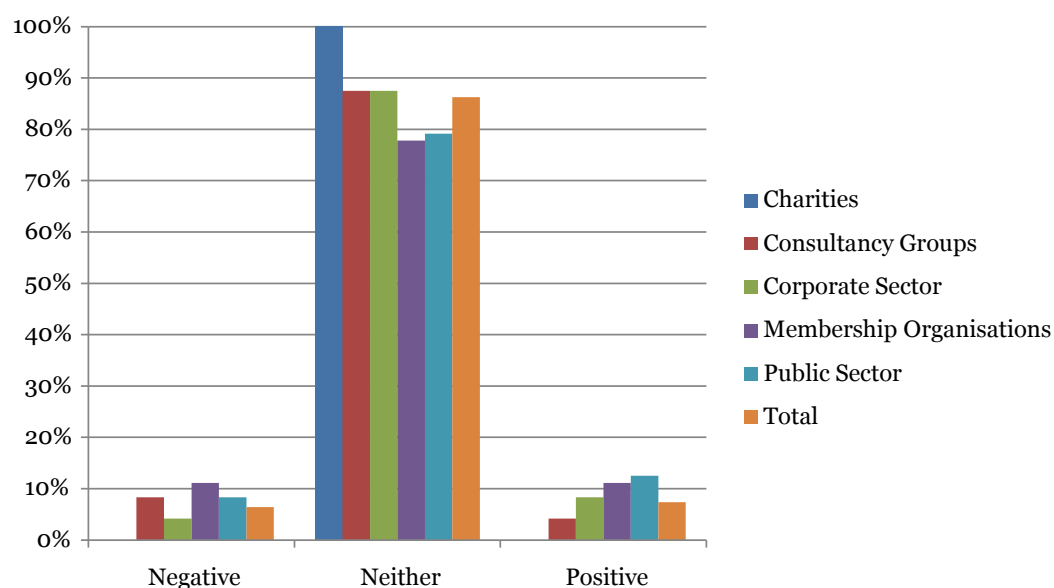
Figure 26:
Responses to the
question ‘Do you
think the upcoming
referendum on an
alternative voting
structure will have a
positive or negative
impact on your
organisation in 2011?’



As with Question 5 and Question 6, respondents generally felt that the planned referendum on alternative voting structures would have neither a negative nor a positive effect on their individual organisation; in fact, of the three questions this had the highest response rate for ‘neither positive nor negative’.

By Sector

Figure 27:
Responses to the question 'Do you think the upcoming referendum on an alternative voting structure will have a positive or negative impact on your organisation in 2011?', separated by organisation type



When the scores for the different organisation categories are separated, a similar result is found across all three possible answers, indicating a widespread belief that the planned referendum will not be a factor in the success of respondents' organisations in 2011. Interestingly, all of the charitable organisations surveyed selected 'neither' as their answer for this question – the only time in the survey that a group of respondents displayed complete unanimity. While this cannot be extrapolated to the wider public as a whole due to the limited sample size, it is an indication that charitable organisations generally have strong doubts about the likelihood that election policy change will have any real impact on their day-to-day running practices.

Questions 5-7: Combined

When the scores for Questions 5 through to 7 are combined into one chart (that is, an analysis of the combined impact of Local Government elections, the upcoming UK elections for Wales, Scotland and Northern Ireland, and the future referendum on alternative voting structures as set out by the Liberal Democrats in their 2010 campaign manifesto), there was still a definite trend towards the selection 'neither positive nor negative' when it came to collating the votes.

Figure 28:
Aggregate responses
to questions 5, 6
and 7, separated by
organisation type

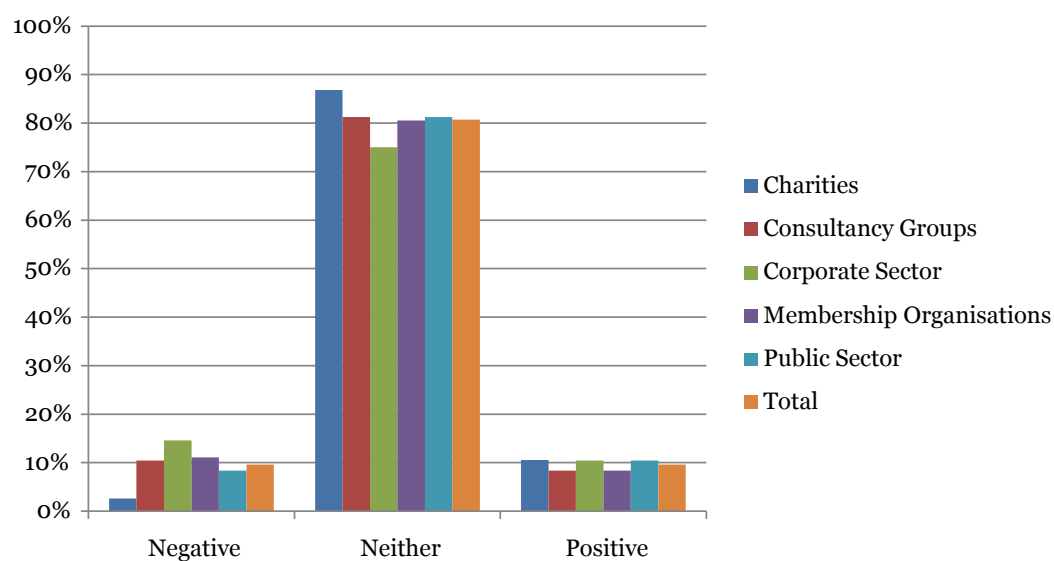
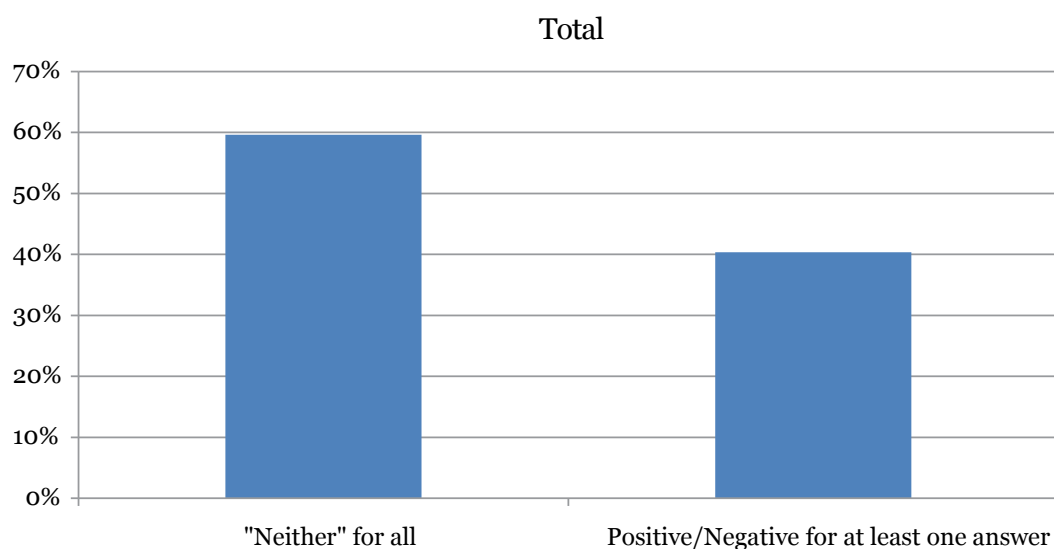
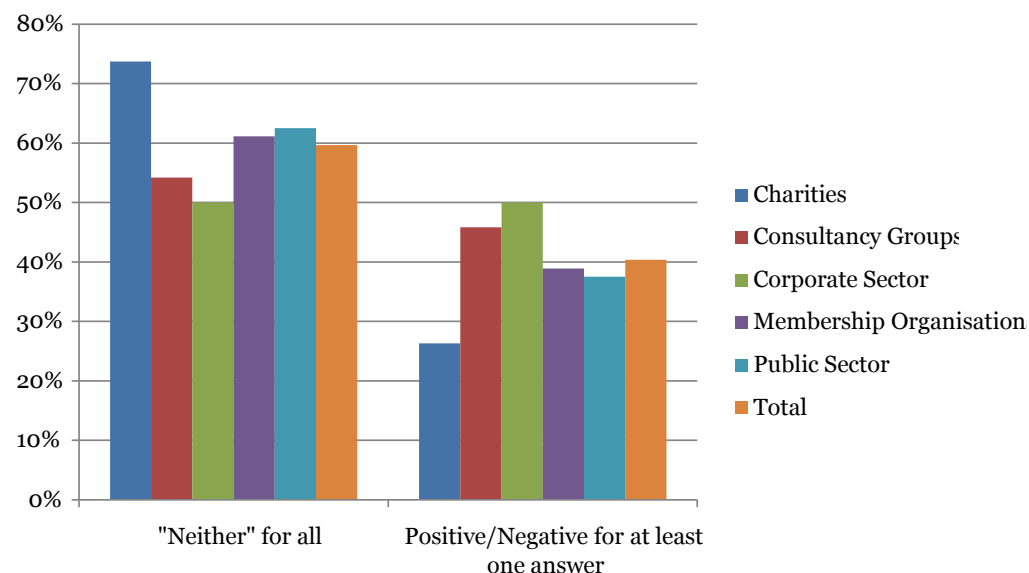


Figure 29:
Responses to questions
5, 6 and 7, charting the
number of respondents
who answered 'neither'
to all three



In fact, six out of ten respondents gave the answer ‘neither positive nor negative’ for all three of the questions with no variation. This goes to highlight that – while the country was up in arms about the General Election of May 2010 – smaller elections and referenda are not necessarily seen as being of particular importance to the day-to-day running of businesses and other organisations.

Figure 30:
Responses to questions
5, 6 and 7, charting the
number of respondents
who answered ‘neither’
to all three, separated by
organisation type



As can be seen by dividing the results according to sector, this is the case with reasonable consistency across the groups. Charities are significantly more likely to have voted ‘neither’ for all three of the questions, suggesting either a) a feeling of isolation from government policy and a belief that these elections are unlikely to bring about particular change, or – and perhaps more likely – b) a feeling that local elections are unlikely to make much difference to their largely donation-driven operation. On the other hand, respondents from the corporate sector were more likely than average to believe that at least one of the three questions asked would have some bearing on how they ran their business.

Conclusion

The February 2011 Predictive Trends survey found that:

- Following on from last year's Comprehensive Spending Review, six out of ten people surveyed felt less optimistic about the country's economy. Only 18% of respondents felt more optimistic as a result of the CSR.
- Overall, respondents thought that social welfare, the economy, public sector pay and healthcare were the areas of government policy likely to have the most difficulties in 2011.
 - Charitable organisations were more concerned than the average for the state of industry and jobs, legal reform, and the country's social welfare programs.
 - Consultancy groups were more concerned than the average about the nation's transport infrastructure and issues regarding public sector pay and pensions. Funding for the arts and issues with the economy, the environment, defence and civil liberties were also slightly higher than average. They were significantly less worried about healthcare than the average respondent.
 - Respondents in the corporate sector were more worried than the average by provisions for the education system, immigration services and banking infrastructure.
 - Membership organisations were more concerned than the average by the nation's defence, the economy and energy policies.
 - Public sector respondents were more worried than the average about healthcare provision and public sector pay and pensions.
- When asked what the most useful thing the government could do to help their organisation would be, over a third of respondents stated that restoring the nation's economy to a state of stability should take precedence.
- Almost half of respondents feel that the upcoming Spring Budget will have a negative effect on their organisation. Only around one in nine feel that it will have a positive effect. Charities and public sector groups are more likely than the average to feel negatively disposed to the budget, while consultancy groups are far more likely to view it in a positive light.
- Respondents did not feel strongly that either the upcoming Local Government elections, the upcoming referendum on an alternative voting structure or the upcoming UK elections for Wales, Scotland and Northern Ireland will have any positive or negative effect on the way their organisation operates.

Feedback

Tell us what you think of DeHavilland's
Predictive Trends Report 2011?

Take part in our survey at: <http://bit.ly/dH7VRL>

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Debate n. a formal discussion in a public meeting or legislative assembly; an argument, especially one involving many people.

Deficit n. the amount by which something, especially a sum of money, falls short; an excess of expenditure or liabilities over income or assets in a given period.

Democracy n. a form of government in which the supreme power is vested in the people collectively and is administered by them or by officers appointed by them.