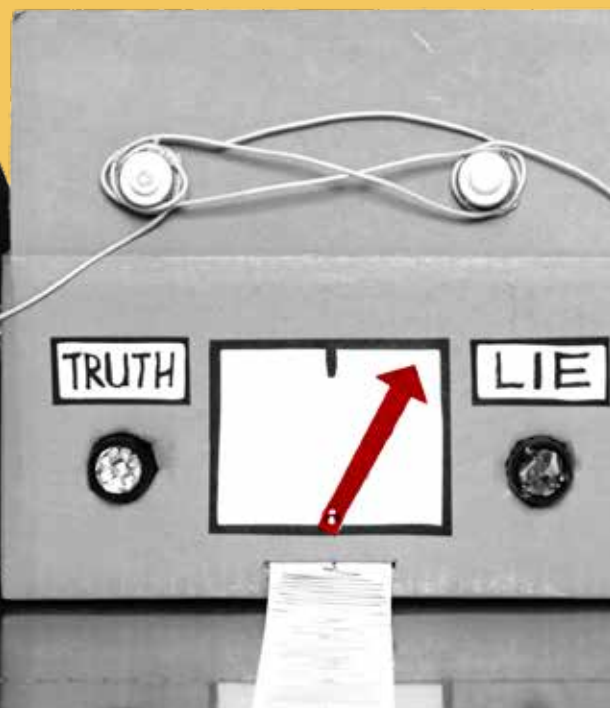Ipsos **Ipsos MORI**

THE IPSOS MORI
ALMANAC
2017

ONLY 13% OF SECONDARY SCHOOL-AGE CHILDREN TRUST THE ORDINARY MAN OR WOMAN IN THE STREET TO TELL THE TRUTH, COMPARED TO 65% [01] OF ADULTS

THE IPSOS MORI

ALMANAC

2017

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SEVEN BRITONS IN TEN (70%) THINK IT IS LIKELY THAT OTHER COUNTRIES WILL ALSO LEAVE THE EU IN THE FIVE TO TEN YEARS AFTER BRITAIN LEAVES [02]

FOREWORD

Welcome to our round up of 2017. This year Britain has been portrayed as divided, split between the 'haves' and the 'have nots', Millennials and Baby Boomers, Brexiteers and Remainers, 'Somewheres' and 'Anywheres', or the experts and the rest.[03]

We in the UK are not alone in experiencing uncertainty about the future, as the pace and reach of change accelerates. Our 2017 Global Trends Survey[04] this summer found one of the starkest themes is the underlying sense of fragmentation across many spheres of life and an increasing disillusionment with how the world is.[05] This is epitomised by a wave of populism and a feeling of 'being left behind' experienced by huge numbers across every continent. This is a genuine global crisis of elites. In every country we study, the majority view is that the economy is rigged to the advantage of the rich and powerful.

In Britain, recent upheavals have crystallised divides that have existed for some time, including a deep generational divide, which we examine in this edition, divisions over our social and economic priorities, competing views about Britain's role in the world, and threats to people's sense of identity, among others.[06] These differences led to an unexpected and equivocal result in the 2017 General Election, with no one party winning an overall majority across the UK, and a shift in the political landscape, particularly in Scotland.

But as 2017 ends, despite these very different views about the challenges we face and the future direction of the country, there are still things most of us do agree on – which we should remember.

OUR PRIDE IN THE NHS IS A UNIQUE FACET OF BRITISH IDENTITY AND IT RECEIVES NEAR UNIVERSAL SUPPORT

There is still a distinctly British outlook and a set of shared values. Respect for freedom of speech, along with respect for the law, and the ability to speak English are still widely shared. We all value our sense of humour (and need to!). Across generations, acceptance of same-sex relationships, abortion and pre-marital sex is growing. We are increasingly socially liberal, but remain tough on crime: 80% also agree the government should have the right to keep people under video surveillance in public areas and 70% think the government should be able to stop and search people in the street at random.[07]

Despite their own problems, British institutions still unite us, and we choose more of them when asked what makes us proud, than any other English speaking country. Our pride in the NHS is a unique facet of British identity and it receives near universal support.[08] Some 95% of people say they respect the UK armed forces. Seven in ten (71%) want to keep the monarchy (only 18% are republicans). We are also proud of our history, with 43% of people saying this makes them proud to be British, coming second only to the NHS (50%). The vast majority aspire to be home owners, regardless of whether they currently are, or think they can be.

Overall then, despite all the political upheavals and uncertainty in recent years, Britons have a shared sense of values and a shared set of attitudes about what we think we should be proud of. Only 13% of us would rather be a citizen anywhere else.[09]

ABOVE ALL, BRITISH PEOPLE WANT TO BE ALLOWED TO FEEL GOOD ABOUT THE COUNTRY AND THEMSELVES

As we struggle with pressure on real wages, austerity in the public sector, rapid technological change and disruption and fractured politics, there's still much that unites us. Above all, British people want to be allowed to feel good about the country and themselves – brands and institutions that understand that will succeed in 2018.

A peaceful Christmas and happy New Year to you and your families.

Ben Page

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Downbeat and divided? Britain in 2017

DOWNBEAT AND DIVIDED? BRITAIN IN 2017

BY BEN MARSHALL
Research Director,
Ipsos MORI Social Research Institute

After the tumult of 2016, this was supposed to be a steady, unspectacular year in which "Brexit meant Brexit" and Britain got on with the business of making it happen. Instead, 2017 will be remembered for a surprise election (and a surprise result), growing gloom about Britain's prospects, and acrimony and uncertainty about our 'divorce' from the EU. The year has also been punctuated by incidents of terrorism and tragedy, but also uplifting stories of solidarity and heroism.

Like other countries around the world, Britain is subject to eight global master trends – described in our analysis of our Global Trends survey – which have, at their core, a complex relationship with change.[10] We seem caught between past and future, traditionalism and modernism, localism and globalism. We want change, but not at any cost; we want to protect but also progress.

This tendency to look both ways was evident in a spat to mark the start of restoration work on the clock tower at the Palace of Westminster. While some MPs gathered with bowed heads for Big Ben's final chime for several years, others advised them to "get a

grip" and focus on the bigger picture.[11] Eurosceptic MPs called for Big Ben to 'bong' for Brexit day on March 29, 2019.

But while there was disagreement about one tower in London, another – Grenfell – became a unifying symbol for anxiety about austerity's impact and failures in the public sector and how disadvantaged people are treated by the state in general. The sentiment was very much "never again". After the blaze, the local community and people farther afield came together in compassion and solidarity, just as they did in Manchester and in London after several murderous terror attacks.

Theresa May's tour of Grenfell prompted criticism of her for misjudging the mood, having already been chided for too many stage-managed events during the general election campaign. This had started with Brenda from Bristol expressing her unequivocal distaste of "too much politics",[12] continued with accusations of 'zombie' campaigning and damaging U-turns, and ended with the Conservative's majority being frittered away in the worst campaign by a ruling party since 1945. As Gideon Skinner describes on p.20, Labour achieved the largest swing during an election campaign ever seen by Ipsos MORI, winning in places like Kensington and Canterbury, although still only polling slightly better than Kinnock's party in defeat in 1992.

The Prime Minister had used her Easter message to say that the country was coming together – in contrast to a divided Parliament – but the election result exposed deep, and complex divisions. Our polling found age to be more of a dividing factor than in any election since records began in 1979. It was the 'losers' election' [13] but as both main parties sought to grapple with Brexit psephology, the result saw, simultaneously, Labour's best share among ABC1s going back to 1979 and the Conservatives' best score among C2DEs since then.

Traditional party loyalties are in flux and Brexit is shaking things up, but its impact has possibly been over-stated and over-simplified. Ipsos MORI's Shifting Ground report for Unbound Philanthropy found that there is not one type of Leave or Remain voter, demographically or attitudinally, and while Brexit has revealed

THE BRITISH ARE STILL AVERAGE IN TERMS OF 'GLOBALIST' OUTLOOK

Attitudes in Britain compared to other countries, 2013-2016
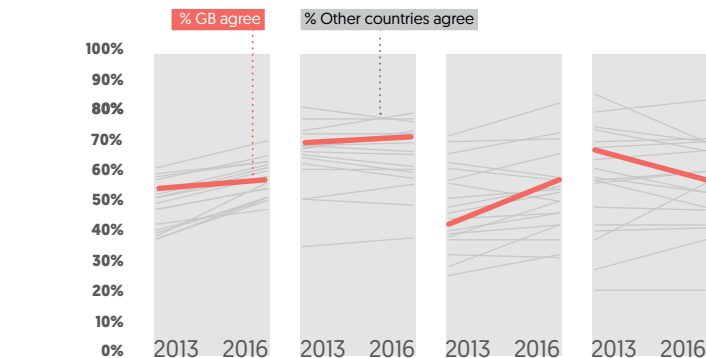
% GB agree   % Other countries agree

100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%

2013 2016   2013 2016   2013 2016   2013 2016

I have enough trouble worrying about my own problems without worrying about other people's problems

People across the world have more things in common than things that make them different

Globalisation is good for {COUNTRY}

There are too many immigrants in {COUNTRY}

new political fault lines across party loyalties, other traditional party political divides remain.[14] Nor has it really changed world views or diminished 'globalist' sentiment (see graphic above).

Britons have also become less negative about immigration, with an increasing proportion believing its impact to be positive.[15] By tracking the views of the same group of people, we have detected a 'churn' in attitudes less evident at the aggregate level and, tellingly, more substantial change following the EU referendum. Immigration is also now much less likely to be mentioned by the public as a top concern in our monthly Issues Index, replaced by Brexit and our relationship with the EU as an issue (these concerns are, of course, intertwined: a large proportion of those mentioning the EU will be focused on its impact on immigration).

Downbeat and divided? Britain in 2017

These changes seem to reflect a galvanising effect from the Brexit vote on those who already held positive views, and reassurance among those who are worried now that the prospect of reduced immigration seems more realistic. They also chime with evidence of increasing British concern about inequality and poverty, a weariness of austerity and its impact on public services, and a period effect of increased tolerance of different lifestyles and opinions.

What of how the world sees us? Our research, and that by Pew, has found that America's global image has suffered under the Trump presidency.[16] Britain is still mid-table in terms of how positive an influence we are seen as having. EU countries see us less positively than others but, still, over half the population in Italy, Sweden, Hungary, Poland and France are positive about Britain's impact on the world (Germany, Belgium and Spain are less convinced).

Despite Brexit, Europe is still seen as our most important international relationship and we don't want to withdraw from the world, remaining relatively pro-trade and as sure of the value of our 'soft power' as 'hard' military and economic muscle. Most Britons

DOWNBEAT IN BRITAIN
British gloom over time

BREXIT VOTE

Average no. of mentions

% agree: Britain on wrong track

% agree: economy will get worse in 12 months

MAY 2014

SEPT 2017

Source
Issues Index (average no. of mentions), What Worries the World (% wrong track), Economic Optimism Index (% economy worse)

Base
~1,000 GB adults
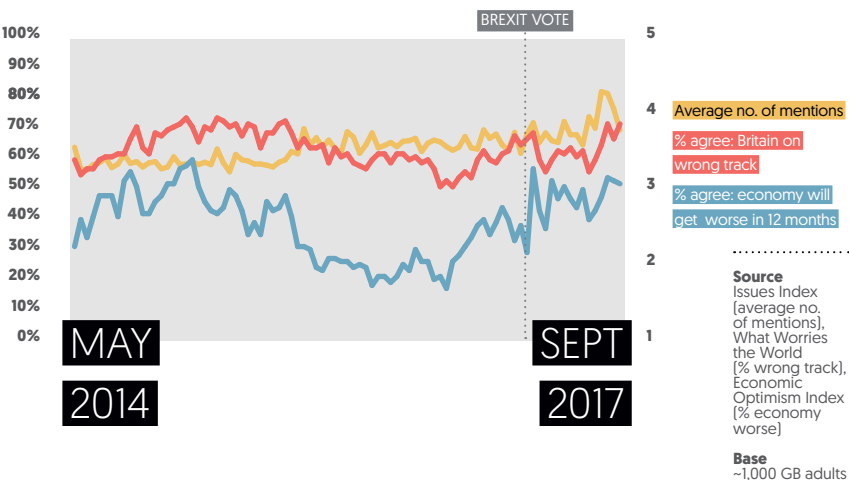
have not changed their mind since the Brexit vote but there are signs of a slim preference for a 'soft' rather than a 'hard' Brexit.[17]

These trends might signpost a route forward and give grounds for positivity – depending on your viewpoint – but, either way, optimism is not a naturally occurring feature of the British psyche. Instead, pessimism is increasing. In May 2016, 40% thought that the country was heading in the right direction (rather than being on the 'wrong track'), but by July this year it fell to 28%, where it has stayed.

New analysis of our long-running Issues Index – asking 'What are the most important issues facing the country?' and sometimes called a 'barometer of concern' – has shown us getting more worried by more things. Uncertainty and shock seem like permanent fixtures; little wonder perhaps that this year saw the introduction of a new emoji – a "shocked face with exploding head".[18]

Will the economy provide the next shock? Economic pessimism has risen since the referendum, and the public are less sure than they were that house price rises – an economic given – will continue. Things might get worse before they get better, particularly with a large Brexit 'divorce bill'. The Resolution Foundation are not alone in foretelling an economic slide and uneven impacts, saying that people are earning no more than they did in 2006 despite the economy being 4.4% bigger per person, and that things will get worse.[19]

Where does this leave us? The British want to hope, but have pretty low expectations about what the future holds. As Brexit rumbles on, it can sometimes feel like we are alone and unique, but disconnection and fragmentation is also evident across Europe and the US.

On a more optimistic note, our Global Trends Survey shows that, on several key measures, Britain is, mostly decidedly average or close to it (see graphic overleaf) and while this is hardly a flattering moniker, there should be comfort in numbers. Moreover, by nearly four to one those who think Britain is in decline don't think this is irreversible.[20] The British agree more about many things than other countries – like a belief in gender and sexual equality, an abiding

BRITISH ATTITUDES NOT THAT DIFFERENT FROM GLOBAL AVERAGE (BUT WITH A FEW OUTLIERS)

Comparison of GB and global average % across 50 selected measures covering outlook, life, work, politics, state, environment and family

GLOBAL AVERAGE

"The role of women in society is to be good mothers and wives"

"Gay men and lesbians should be free to live their own life as they wish"

100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%

-30   -20   -10   0   +10   +20   +30

Source
Ipsos Global Trends Survey

Base
16,039 adults across 20 countries, 3-17 Sept 2013 / 18,180 across 23 countries, 12 Sept-11 Oct 2016 (1,000 in GB)
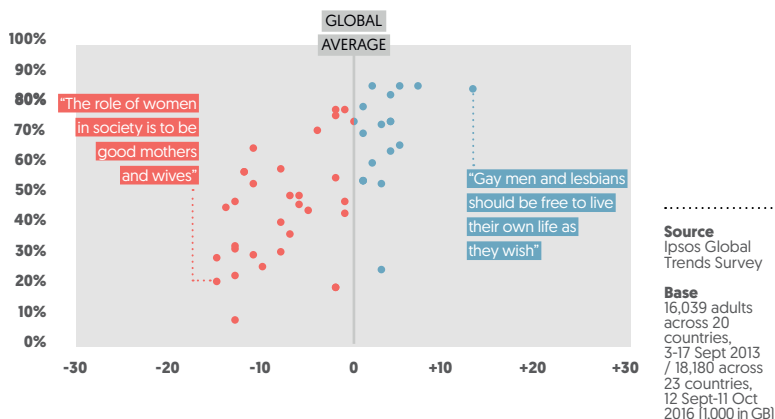
faith in the NHS and monarchy, and a shared celebration of British values like humour, tolerance and free speech.[21]

At the start of the Brexit negotiations, David Davis likened their complexity to the NASA moon landings. With our rocket hurtling through space, it seems that we're not sure whether and how we can land, what will greet us when we do, whether our astronauts are up to it, and whether or not we can afford such a mission anyway.

This always was going to be a bumpy ride. ●

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59% OF BRITONS SAY THEY NEVER CHECK IN WITH WORK WHILE ON HOLIDAY, DOWN FROM 64% IN 2009 [22]

The year British politics swung left?

"LOOK AT ME, I'VE GOT YOUTH ON MY SIDE"

THE YEAR BRITISH POLITICS SWUNG LEFT?

BY GIDEON SKINNER
Head of Political Research,
Ipsos MORI Social Research Institute

The 2017 General Election saw the biggest swing from one party to another we've seen in any recent election – for once, the campaign made a difference. From a position of what seemed unassailable strength, the Conservatives ended up losing their majority (despite, of course, winning the election with an increased vote share that was their highest since Margaret Thatcher's time). Labour, meanwhile, increased their vote share even more, almost equalling Blair in 2001 (although not in turning that into seats), with perceptions of Jeremy Corbyn completely turned around. So what happened, and why – and what does the picture look like at the end of the year?

First, it's worth reminding ourselves of the strength of the Conservatives' starting position. Yes, it may have been a honeymoon, which hadn't been tested in a real campaign (as Gordon Brown may have realised in 2007), but nevertheless it was one of the strongest we have seen. Theresa May had the highest satisfaction ratings we have ever recorded for a Prime Minister in the month before an election. Her party was seen as clear and united and led on four of the five most important issues to voters,

The year British politics swung left?

while Labour had made no progress since Ed Miliband's time as being seen as ready for government. This was mirrored in real votes: the 2017 local elections saw Labour fall to the worst share for an opposition party since 1979, while the UKIP collapse helped deliver a 7% swing to the Conservatives. That doesn't mean calling the election wasn't a gamble – as John Curtice pointed out, in 2015 a big lead of almost seven points still only gave the Tories a small majority – but it does mean we need to understand what happened during the campaign to explain why the gamble didn't work out.

- As we reported at the time, Theresa May's ratings fell significantly during the campaign, in response to the poorly received manifesto and her unimpressive media performances. Even at the height of the honeymoon, voters liked Theresa May more than her party, which meant the presidential focus of the campaign could backfire if her ratings slipped. And slip they did, from a 38-point lead as most capable PM in April to 11 points (albeit still a lead) in June.

THE ELECTION CAMPAIGN SAW A BIG CHANGE IN LEADER SATISFACTION RATINGS OF MAY AND CORBYN – BUT LITTLE MOVEMENT SINCE

How satisfied or dissatisfied are you with the way ... is doing his/her job as Prime Minister/Leader of the Labour Party? % satisfied

Election campaign

42% CORBYN

37% MAY

AUG 2016

OCT 2017

Source
Ipsos MORI
Political Monitor

Base
c.1,000
British adults
each month
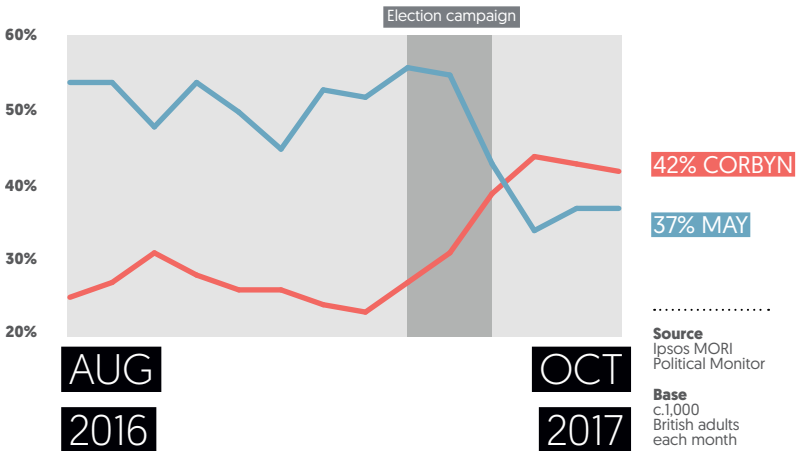
- At the same time, Jeremy Corbyn managed the difficult job of changing the public's first impressions of him, rising from 27% satisfied in April to 39% in June. Among Labour supporters it rose even more, from 53% to 71%.

- Labour supporters also firmed up their vote. In April, 43% said they might change their mind about voting Labour (many even considering switching to the Conservatives), but by the end of the campaign this had halved.

- This change was also picked up in our qualitative research during the campaign. At first, May was seen as the most effective leader – even a group of Remain voters in Bedford said "When I see Corbyn on the telly I turn it over … May is the best person to take us forward". But by the end of the campaign undecided voters were telling us, "My opinion of Corbyn has gone up – every question he's had thrown at him, he's answered and explained himself. I was undecided about Jeremy Corbyn but, this election, he's done well". The strengths he always had of being seen as honest, authentic, and concerned about people in real need, seem to have played well.

- Corbyn's personal empathy helped because, although Brexit was undoubtedly important, it wasn't as dominant as many expected. Notably, there were signs the public had reached a tipping point over austerity and public services. Back in 2015, the public still believed just enough in the Conservatives' 'long-term economic plan', but economic pessimism had steadily increased from 26% in June 2015 to 43% two years later, especially among young people. Meanwhile, concern about the NHS and education rose to their highest in over ten years. Our focus groups also said they were no longer inclined to believe austerity was an economic necessity – "They tend to hide behind that … you hear about austerity measures … it just means cuts, cuts, cuts", which the manifesto mistakes on the so-called dementia tax and free school meals played into.

The outcome of all this was heralded at 10pm on 8 June by the very accurate exit poll we undertook with GfK for the broadcasters. Our analysis of voting patterns from constituency results and our own estimates suggest that:

The year British politics swung left?

- The Conservatives increased their vote – with 13.6 million votes, the highest of any party since John Major in 1992. In fact, their vote share only fell in 87 seats (mostly in London). What's more, they lost more seats in constituencies where their vote rose than where it fell.
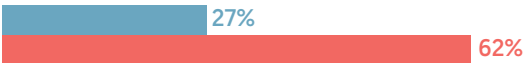
YOUNG PEOPLE WERE TWICE AS LIKELY TO VOTE LABOUR THAN CONSERVATIVE, OLDER PEOPLE TWICE AS LIKELY TO VOTE CONSERVATIVE THAN LABOUR
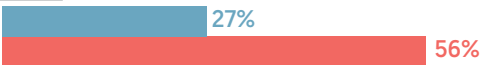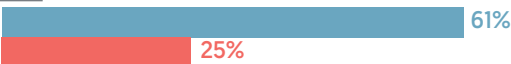% estimate vote share in 2017 General Election

CONSERVATIVE
LABOUR

18-24
27%
62%

25-34
27%
56%

35-44
33%
49%

45-54
43%
40%

55-64
51%
34%

65+
61%
25%

- This suggests that while the Conservative strategy may have been partly successful, especially their pitch to Leave voters, they were unable to counter the even bigger rise in Labour's vote share. The Conservatives did benefit the most from UKIP's collapse – but some previous UKIP voters may have stayed at home. Meanwhile, Labour did even better among those who didn't vote in 2015, as well as among other Remain-leaning voters such as the Greens. (As in 2015, switching between Labour and the Conservatives was relatively low, and cancelled itself out.)

- A key driver of Labour's increased support has been down to young people, as age became a crucial dividing line. There was a large swing to Labour among the under-44s, while over-55s swung to the Conservatives. At the same time, unlike in 2015, we saw a big increase in turnout among the under-35s (boosting Labour still further), while it dropped slightly among the oldest voters. On the other hand, class divides are now much flatter.

Finally, in stark contrast to the changes during the campaign, the public's views since June seem to have plateaued. Jeremy Corbyn interpreted the result as a decisive shift to the left in Britain, with his Labour Party as the new mainstream. They certainly are in a much stronger position than before the election was called, and the Conservatives weaker – but Britons are still split over the centre of political gravity. Theresa May's ratings haven't recovered and have been overtaken by Jeremy Corbyn, but neither has changed much since the summer. Economic pessimism remains high, and support for further cuts low. Brexit is still seen as the most important issue facing the country, and there isn't much confidence in Theresa May to get a good deal – but confidence in Jeremy Corbyn is no higher. When it comes to voting intentions, it has moved from a small Conservative lead in the election to a statistical dead heat, with every chance of another hung parliament (were a general election to be held tomorrow) – though as this year has shown, people's views may change during a real campaign! There is no sign of British politics getting strong and stable yet. ●

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Give us a smile girls!

GIVE US A SMILE GIRLS! WHY THE PORTRAYAL OF WOMEN IN ADVERTISING HAS FAR TO GO

BY HANNA CHALMERS
Senior Director, Ipsos Connect

From the worldwide Women's March in January, to the media furore following the revelations around the gender pay-gap in organisations like the BBC, to the #MeToo movement where women shared their stories of sexual assault and harassment in response to the scandals rocking the entertainment, political and fashion worlds – women refused to remain silent this year when their rights or place in society were under threat.

The role of women in society remains one of the most important and contentious issues of our time. But the advertising industry, usually so keen to capture the cultural zeitgeist, seems to be on the wrong page. Seventy per cent of Britons think that adverts only show stereotypes and only 11% feel they reflect women accurately. Some 43% of us think that advertising is mostly or entirely made by men (vs only 3% of us who believe it is mostly made by women).

But it isn't just women that advertising is failing to portray realistically, only 16% think ads reflect life in Britain today. Just one in five of us (19%) believe that advertising shows people that they can relate to personally.

Give us a smile girls!

But does it matter how men and women are portrayed in advertising?

Well, yes. Whether we like it or not, advertising is the wallpaper of our lives; UK advertising expenditure reached a staggering £21.4 billion in 2016.[23] The messaging matters – it subtly helps build

HOW WOMEN AND MEN ARE PORTRAYED IN ADVERTISING MATTERS

To what extent do you feel positive or negative about the brand being advertised when women/men appear in the following ways, or does it make no difference?
% negative

Women portrayed predominantly as...

Objects of desire	46%
Responsible for domestic chores	41%
Emotional	36%
Mothers	16%
Humorous	7%
Professionals	6%
Intellectual	5%

Men portrayed predominantly as...

Lazy	46%
Objects of desire	35%
Masculine	18%
Responsible for domestic chores	16%
Professionals	12%
Fathers	11%
Intellectual	10%
Humorous	7%

our mental picture of what 'normal' or 'right' is. How women (and men) are portrayed in advertising also impacts the bottom line. Four in ten people say they feel more negative towards brands that portray women predominantly as responsible for domestic chores (41%) or as objects of desire (46%). This swings both ways – 46% of Britons say they would also view a brand more negatively if their ads portray men as lazy. As a result, the Advertising Standards Authority (ASA) has announced its intention to get tougher on gender stereotypes in advertising,[24] while Unilever reiterated its pledge to eradicate gender stereotypes from their ads with the launch of the Unstereotype Alliance.[25]

The ability of advertising to portray, accurately, the way in which people really live is only going to become more important in the future. Younger Britons are more likely to say that it is important that advertising represents their culture and values – 57% of 16 to 24 year olds and 54% of 25 to 34 year olds, compared to just 41% of 55 to 75 year olds. But it isn't just younger generations that advertisers need to be mindful of – half of those aged over 45 believe that advertising is bad at showing people they can personally relate to (only 13% of this age group think advertisers are good at this, half the figure of the younger age groups). If advertisers are not careful they risk alienating this group, who also wield plenty of purchasing power.

ADVERTISING IS NOT VERY GOOD AT SHOWING PEOPLE WE CAN RELATE TO

Overall, how well or badly does the advertising you see do the following? – Showing people that I can personally relate to
% well

Source
Ipsos MORI

Base
1,125 adults in the UK aged 16-75, online, 6 – 11 Oct 2017

16-24	25-34	35-44	45-54	55-75
24%	22%	26%	13%	13%
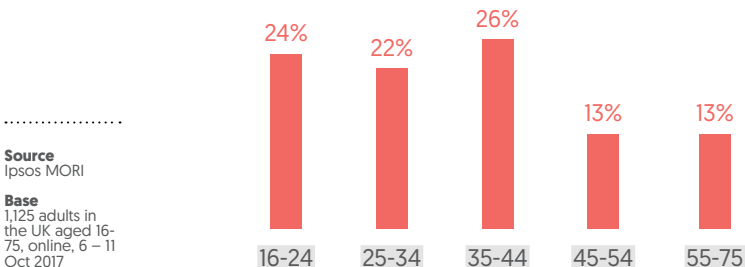
Give us a smile girls!

What can advertisers do to address this issue? According to Caroline Heldman of the Geena Davis Institute on Gender in Media, "We have to write female characters with more screen time, more speaking time, more prominence in the storyline, with more personal agency, and without objectifying them".[26]

It is clear that advertisers need to move beyond the lazy stereotypes of women, and work hard to portray women (and men) as fully-rounded, complex and diverse human beings, with a wide array of roles, desires and motivations. There is a need to create ads that resonate with people, by showing life as it is now – such as McCain's 'We Are Family' ad, which celebrated the kaleidoscope of British families, or the Bodyform ad which features red period blood rather than a mysterious blue liquid. The public are most positive about brands that portray women predominantly as intellectual, professional or humorous (37%, 33% and 31%, respectively).

Advertising is part of our cultural (and physical) landscape: it is not going anywhere any time soon. But it needs to be reinvigorated, to reflect more accurately life as it is now. One way it can do this is by discarding its last stereotypes and assumptions of how men and women behave, and instead observing culture, listening more closely to what is going on around them, to what men, women, families and individuals really are, and present gender as it is for a more equal, more diverse, age. ●

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15% OF SMARTPHONE USERS SPEND HALF THE DAY GRAZING ON THEIR PHONES [27]

Sugar: more dangerous than gunpowder?

SUGAR:
MORE DANGEROUS
THAN GUNPOWDER?

BY PIPPA BAILEY
Head of Innovation, Ipsos MORI

Sugar: more dangerous than gunpowder?

Most people in Britain are overweight – 58% of women and 68% of men.[28] Sugar is just one of many factors in our complex obesity story, but one thing is for certain, our innate liking for all things sweet, which once guided us to safe and nutrient-dense sources of food, is now working against us.

Obesity alone is a significant economic burden for our healthcare system; £5bn annually for the NHS.[29] Factor in the dramatic rise in Type II diabetes (from 1.4 million to 3.5 million in the past 20 years)[30] and the increase in dental caries, where sugar is largely culpable, the need for action on sugar is patently obvious.

Sugar has had plenty of attention in 2017 – from the reporting of Nestlé's plan to reduce the sugar in their snacks by ten per cent,[31] to claims in the British Journal of Sports Medicine that sugar could be as addictive as cocaine,[32] and the government's plans to introduce a sugar tax in April 2018. Our research shows Britons are most accurate at estimating the amount of sugar in products – specifically a can of cola – when compared to other nations.[33]

Even though 77% of Britons acknowledge that 'of all the things I can do to maintain good health, eating right is the most important',[34] and we accept that responsibility for our health ultimately lies with us, the issue is complex. Despite good intentions, we all have behavioural biases which stop us making better choices, for example, our intention-behaviour gap, our optimism bias, our
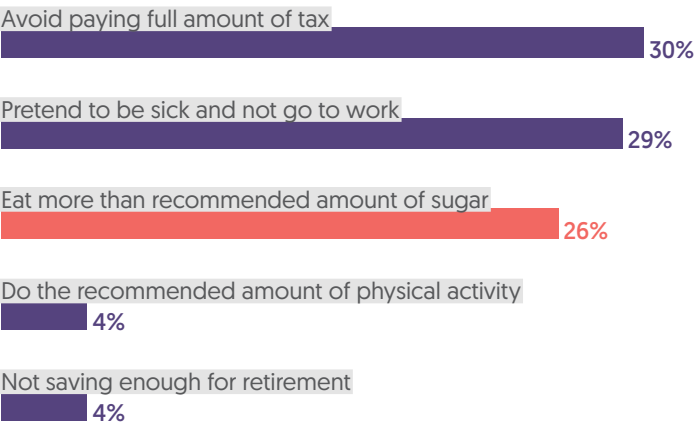
DESPITE GOOD INTENTIONS, WE ALL HAVE BEHAVIOURAL BIASES WHICH STOP US MAKING BETTER CHOICES

sheep-like tendencies (social norm and status quo bias) and poor self-awareness of what we eat and drink.

The most significant challenge though, is the denial and shame associated with sugar consumption. Our research for the International Behavioural Exchange Conference shows that the 'social norm gap' (i.e. the difference between what individuals think others do versus what they tell us about their own behaviour) for sugar consumption is in line with other undesirable behaviours such as tax evasion or avoidance and taking 'sickies' from work. Consumers think that eating too much sugar is a problem for other people, not them. This level of denial means that driving behavioural change for the better will be challenging.

THE SOCIAL NORM GAP FOR SUGAR IS IN LINE WITH ILLEGAL AND IMMORAL BEHAVIOURS SUCH AS TAX EVASION AND PULLING SICKIES

% social norm gap between what individuals do versus what they tell us about their *own* behaviour

Avoid paying full amount of tax
30%

Pretend to be sick and not go to work
29%

Eat more than recommended amount of sugar
26%

Do the recommended amount of physical activity
4%

Not saving enough for retirement
4%

Source
Claimed behaviour: Ipsos Global Advisor; Actual behaviour: Lancet/WHO 2012 and PHE 2014

Base
c.1,000 residents aged in each country (16-64 in UK, Australia, Germany and France and 18-64 in US and Canada) August 2015

Sugar: more dangerous than gunpowder?

What might work?

By reviewing our previous work, looking at the effectiveness of different interventions,[35] and taking into account the amount of control that each of these has on our freedom of choice,[36] it is possible to find those initiatives that will have the greatest impact on our health without unnecessarily limiting our ability as humans to make our own choices. This framework is summarised in our report, Sugar: What next?[37]

Easy wins include providing a greater share of space and prominence to healthy alternatives, and provision of product ranges with improved nutritional profiles. Interventions that have more restriction on choice but are still very effective in reducing sugar intake include limiting access to high-calorie products in schools, reducing portion sizes, removing extra-large single-serve offerings and stealth reformulation of food and drink products.

Gradually reducing added sugar so that consumer tastes adapt over time is already something that food and drink manufacturers are engaged in. This is also an initiative which is considered by MPs (66%) to be the most effective way of reducing sugar intake and an intervention which MPs most support.[38]

To truly address the sugar crisis, it will be necessary to have a concerted and coordinated effort across the public and private sectors – and it seems there is room for manoeuvre, as the guilt attached to our sugar habit suggests there will be very little backlash if restrictions are imposed by the government or regulators. ●

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NEW YORK IS THE MOST POPULAR CITY WORLDWIDE AND LEADS FOR BUSINESS, WHILE PARIS IS BEST TO VISIT AND ZURICH TOP FOR LIVING.

LONDON SLIDES ONE PLACE OVERALL TO THIRD

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Things have only got better?

THINGS HAVE ONLY GOT BETTER? THE CHANGING FACE OF BRITISH BUSINESS

BY SIMON ATKINSON
Chief Knowledge Officer, Ipsos

This year we've been taking stock of Britain's changing business climate.

Our reflection has been prompted, in part, by the 35th anniversary of our Captains of Industry survey which, since 1981, has been quizzing senior executives from FTSE 500 companies about how they see the business landscape.

Gloom and doom

The survey was born at a time of real economic upheaval, with Margaret Thatcher's government still relatively new and grappling with the twin challenges of unemployment and inflation, not to mention volatile industrial relations. In that first 1981 survey, the main preoccupations of business leaders were 'lack of demand' and 'the recession – in the UK and abroad'. Nearly four decades later, the top concerns facing their company are expressed a little differently: 'uncertainty around Brexit' and 'lack of industrial investment and economic growth'. Next on the list: 'finding and retaining the best staff' and 'digital transformation'.

Things have only got better?

	THEN (1981)	NOW (2017)
PRIME MINISTER	Thatcher	May
CONSERVATIVE MAJORITY	43	None
UNEMPLOYMENT (%)	9.6	4.9
INFLATION RATE (RPI) (%)	11.9	1.8
ANNUAL GDP GROWTH (%)	-0.8	1.8
UNION MEMBERSHIP	12,311,000	6,216,000
MOST IMPRESSIVE BUSINESS PERSON	Lord Weinstock	Sir James Dyson

Source
Unemployment, inflation (RPI), annual GDP Growth source: Office for National Statistics, Union membership: Department for Business, Energy and Industrial Strategy

GROUNDHOG DAY? 1981 ... OR BRITAIN TODAY?
Extracts from the 1981 survey. Q: What problems facing your company today do you think will be particularly important over the next five years?

"*The question of whether or not the political side of the country becomes more socialist and there is more government control over business.*"

"*The respect of the world, for the UK. Energetic and efficient management has got to develop and the manufacturing side of this country has got to become competitive with the rest of the world in the same way as the tourist industry has.*"

"*It's difficult to see five years ahead because of the world political situation. For example, in Iran we were doing a lot of business but we had to leave jobs unfinished there – we could go back if the situation improves.*"

Delve a little further into the 1981 report and it's clear that not everything about the British economic context has changed beyond recognition. Below are some extracts from the 1981 survey; it wouldn't be too difficult to pass them off as quotes from business executives in 21st century Britain.

PARADISE LOST OR PROGRESS?
How business leaders rate progress on 15 key indicators between 1981 and the present day

Methods of communication with customers
89%

Diversity in the workforce
89%

Level of customer service
85%

Business culture in the UK
84%

Access to global markets
83%

Access to employees from around the world
82%

Quality of management
80%

Relations between management and employees
80%

State of the UK economy
78%

Access to finance
74%

Profitability of UK business
71%

Access to the EU Single Market/The Common Market
66%

Quality of the UK's infrastructure
62%

Skills of school leavers
36%

Security of the UK energy supply
14%

% SAYING A LITTLE BETTER/ A LOT BETTER

Things have only got better?

What's changed?

Our recent research in the UK and other developed markets has often shown a strong sense of nostalgia when people look back at how things have changed – also manifested as worries about where we are heading next. So, while there may be a sense of 'Paradise Lost' among some of us, this is rather less evident once we get inside Britain's business boardrooms. To mark this 35th anniversary, we asked our respondents to rate progress on 15 key indicators between 1981 and the present day. The findings are overwhelmingly positive – as if things have been transformed. Whether it's the state of our economy, our business climate or our management skills, senior executives think we've made real progress.

Not everything is rosy, of course. Business leaders appear unconvinced about standards in our schools, whatever the official indicators may say. And it looks like security of our energy supply is keeping some of them awake at night, even if we are yet to be threatened by 1970s-style power shortages.

Language matters

One thing that is immediately apparent when we compare today's survey with those from the archive is how the language of business has moved on. Back in the 1980s, the ins and outs of the so-called 'North-South Divide' were widely discussed. Today's 'Northern Powerhouse' concept has been added to our dictionary of terms only recently. Take a look at technology. Back in the day, we were asking questions about 'micro-electronics'. It's worth noting that this does not seem to have been a topic that Captains were paying much attention to at the time. Scroll forward to the current day and it is 'high-speed broadband' which is now the most important show in town. And yes, whether you call it legislation or regulation, businesses still feel there's too much red-tape.

But – as they themselves say – whatever problems the country faces, and whatever barriers businesses feel have been put in their way, there is a sense that the country really has moved on since the early 1980s. So, as we look to what could be an extraordinary few years ahead, perhaps we can take some solace from Britain's resilience and ability to adapt to changing circumstances. ●

BUSINESS BUZZWORDS

1981

TODAY

NORTH SEA OIL

36% agreed that "Britain is not getting enough of the benefits of North Sea Oil"

NORTHERN POWERHOUSE

40% are optimistic that "the ambitions of the Northern Powerhouse can be realised"

EEC

5% cited membership of the EEC as "one of the problems that will be particularly important over the next five years"

BREXIT

84% say that a 'Remain vote' "would have been best" for their business

MICRO-ELECTRONICS

64% admitted to "knowing just a little" or "heard of but know nothing about"

HIGH-SPEED BROADBAND

80% say it "should be made a priority for investment"

LEGISLATION

80% agreed that "there is too much legislation governing the activity of industry these days"

REGULATION

71% feel "the level of regulation on UK business is harming the economy"

Source
Ipsos MORI
Captains of
Industry Survey,
1981-2016

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The truth about Millennials – and the lies

THE TRUTH ABOUT MILLENNIALS – AND THE LIES

BY HANNAH SHRIMPTON
Research Manager,
Ipsos MORI Social Research Institute

'Millennials' is an abused term – misused to the point where it is often written off as just a meaningless buzzword. But to do so would be a mistake. 'Millennials' is a working title for a huge generation – making up 26% of the adult population in the UK – and while misunderstood, they obviously matter.

Born between c.1980 and 1995, Millennials have had accusations slung at them ever since they hit puberty. In our report this year – Millennial Myths and Realities – we found that many media stereotypes about them – that they're narcissistic, entitled, "snowflakes", moulded by conflict – are simply not true.
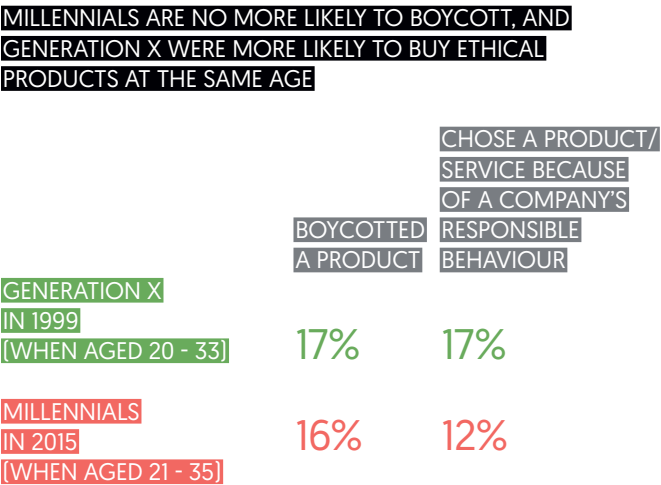
And this matters. There are plenty of examples of how poor research and claims made without evidence can lead to mismanagement, poor investment, failed advertising and useless policies. If businesses, employers and policy makers want to understand this cohort – and they should – it is important to look at some of the 'facts' about Millennials. Millennial characteristics and behaviour are in fact driven by a complex mixture of the period of

history they live in [the period effect]; by their age at any given time [the life cycle effect]; or true generational differences [the cohort effect]. It's important not to confuse them, and while it is impossible to entirely unpick, understanding the nature of change can help predict the future.

To give a couple of examples – much has been made about how Millennials are leading a shift towards ethical purchasing, but we found there is no generational difference in likelihood to buy ethically. Millennials are no more likely to boycott products for ethical reasons compared to Generation X when they were the same age, and are actually less likely to actively choose to buy a product/service for ethical reasons. 'Keen on green' is not a Millennial thing. Don't base your advertising campaign on the idea that it is.

To companies and other big institutions who worry it is impossible to earn Millennials' trust – stop. The reality is that there is no new crisis of trust – people haven't trusted big institutions or business for

MILLENNIALS ARE NO MORE LIKELY TO BOYCOTT, AND GENERATION X WERE MORE LIKELY TO BUY ETHICAL PRODUCTS AT THE SAME AGE

|	BOYCOTTED A PRODUCT	CHOSE A PRODUCT/ SERVICE BECAUSE OF A COMPANY'S RESPONSIBLE BEHAVIOUR
GENERATION X IN 1999 [WHEN AGED 20 - 33]	17%	17%
MILLENNIALS IN 2015 [WHEN AGED 21 - 35]	16%	12%

quite some time, and Millennials are no more or less likely to trust you than any other generation.

So what is different about Millennials? Lots of things – and we cover a range of the distinct qualities of Millennials in our full 2017 report [www.ipsos-mori.com/millennials]. But if there is one thing to remember about Millennials then it's this: the fundamental shape of the Millennial generation can be traced back to two core causal factors – their economic context and the influence of communications technology.

Western Millennials have matured in an economic climate characterised by uncertainty and stagnation. Financial constraint has meant Millennials have [and are] making the key choices associated with adulthood later than any generation before. There has been an extraordinary change in the proportion of younger adults living at home – 31% of Millennials live with their parents in Britain compared to just 18% of Generation X at the same point in their lives. Homeownership has dropped – only a third own their

MILLENNIALS IN BRITAIN ARE MUCH LESS LIKELY TO OWN THEIR OWN HOME
% living independently who own their own home/paying off a mortgage
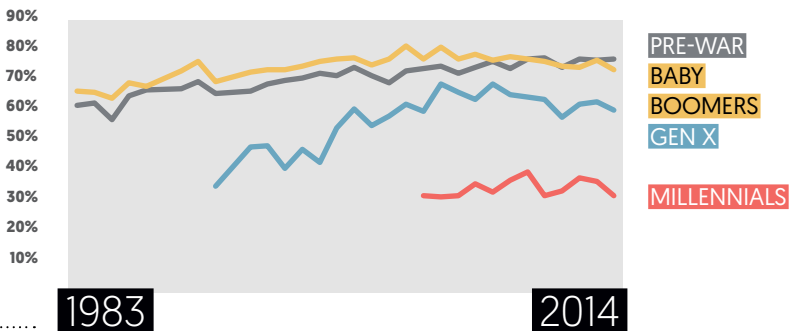
PRE-WAR
BABY BOOMERS
GEN X
MILLENNIALS

1983   2014

own home, compared to over half of Generation X at the same life stage. Millennials are getting married later, having children later and staying in education for longer.

At the same time, the pace of technological change has increased so rapidly over the past 30 years that the tools and connectivity normal for a Millennial are light-years ahead of the gadgets available to Generation X at the same age. Millennials grew up as a truly different and hyper-connected generation. They spend an entire 24 hours a week on their smartphones – double that of Generation X. They're more likely to shape the internet with their own content and some are abandoning live radio and TV in preference of streaming content online. But this doesn't mean there is a massive difference in technological adoption between Millennials and other generations. The reality is that it's a gradual shift – older Millennials are not very different to younger Generation X, and younger Millennials are notably different from older Millennials. However, the average Millennial is wired-in to an explosion of choices. This is fundamental to explaining how they interact with and view social issues, politics and brands; the range of diversified life choices they engage in and, unfortunately, their lack of trust in other people.

But Millennials were not the first, and won't be the last, generation to be misunderstood. The cycle of poorly-founded claims and bad research is happening all over again with Generation Z, as Hannah Whyte-Smith explores elsewhere in this publication. They're 'lazy', they're 'selfish', they won't stay focused – almost exactly the same accusations previously levelled at Millennials are being directed towards Generation Z as they begin to reach adulthood. We will continue our work on generational myth-busting with a Generation Z edition in 2018. Generation Z is a distinct generation with lots of features unique to them – but you shouldn't believe everything you read. ●

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MOBILE DEVICES NOW ACCOUNT FOR OVER 60% OF TIME SPENT ONLINE[40]

IN THE SHADOW
OF GRENFELL

BY LEWIS HILL
Associate Director,
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The tragic scenes of the Grenfell Tower fire will live long in the collective memory of Londoners and Britons alike. Just before 1am on Wednesday 14 June this year, the London Fire Brigade was called to attend a small fire, thought to be caused by a faulty fridge, on the fourth floor of Grenfell Tower in west London. Within half an hour the fire was wildly out of control, engulfing almost the whole tower. It would be two more days until the fire was fully extinguished, leaving an estimated 80 people dead. It is thought that we may never know the full extent of the tragedy.

The Grenfell Tower fire threw the state of housing in the UK into sharp relief. However, the sense that UK housing is in crisis has been acknowledged for some time. Our poll for the Chartered Institute of Housing this year showed that some three-quarters (74%) agree.[41] In London, housing is the top issue, and in 2017 we found that 22% of renters said they would be willing to delay having children in order to afford to buy a home.[42] Three of our five 'Tribes of Brexit Britain' [see Anna Sperati's article on p.114] list housing as one of the most important issues facing the country.[43]

MOST OF US RECOGNISE THERE IS A NATIONAL HOUSING CRISIS

To what extent, if at all, do you agree or disagree with the following statement: "There is a national housing crisis in Britain"

10%
Disagree

74%
Agree
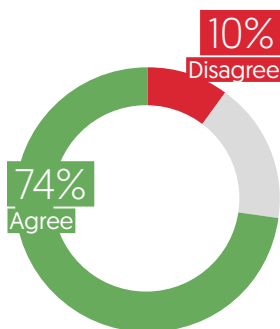
Source
Ipsos MORI/
Chartered
Institute of
Housing

Base
2,195 GB Adults,
8-13 June 2017

However, despite the increasing clamour for something to be done, housing has never managed to register with the British public in the same way the NHS does. We saw little change in concern about housing, even after the Grenfell Tower fire.[44] While concern about housing has been on an upward trajectory since 2010, the tragedy did not bring about the sudden increase one might have expected.

Why might this be? Clearly, the tragedy of the Grenfell Tower fire did not take place in a vacuum: 2017 was a notable year for all sorts of reasons, many of them of overwhelming concern for the British public. The tragedy was about more than just housing, too, incorporating questions of poverty, inequality, building safety regulations and plenty more besides.

The impact of the fire on public sentiment is not clear, but housing has been a sufficiently important issue in recent years for the government to spend lots of time talking about it, and trying to reassure the public that something is being done. Housing was to the fore in the 2015 election, featuring more prominently in party manifestos, leaders' debates and party political discourse. Though the 2017 election was obviously dominated by Brexit, housing remained an important theme both for the government and the opposition.

Since the Grenfell Tower fire, the government has set up an independent inquiry and is undertaking nationwide tests on

THE TRAGEDY WAS ABOUT MORE THAN JUST HOUSING, INCORPORATING QUESTIONS OF POVERTY, INEQUALITY, BUILDING SAFETY REGULATIONS AND PLENTY MORE BESIDES

cladding safety. More recently, and in a departure from its long-entrenched austerity agenda, the government also announced for the first time that it would borrow heavily to invest in new homes and infrastructure – including social housing – to address the crisis.[45]

With just 18% saying they feel confident that the government has the right policies to deal with the country's housing problems,[46] announcements are likely to be met with a degree of skepticism until the reality changes. Our research suggests that the British public firmly supports building more homes, but also that public expectations are about more than just the volume of new building. The public raise issues with the quality and standards of existing

CONTINUED LOW CONFIDENCE IN THE GOVERNMENT ACTUALLY DELIVERING

How confident, if at all, are you that the government has the right policies to deal with the country's housing problems
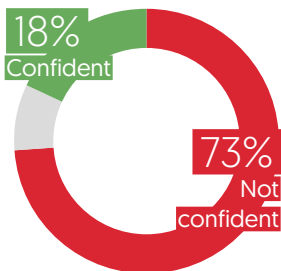
18% Confident

73% Not confident

Source
Ipsos MORI/ Chartered Institute of Housing

Base
2,195 GB Adults, 8-13 June 2017

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stock. Our research for Shelter last year found 43% of homes fall short of the Living Home Standard.[47] In principle, the public are firmly in favour of social housing and the role it plays, and see the right to a decent quality home as universal.[48] They have a dim view of high rises – Londoners believe there should be more limits placed on the number and height of new tall buildings, and that they should be consulted more about them.[49]

In some ways, things are even worse than people realise. While public estimates of house price levels are generally quite accurate, they underestimate the average deposit required to buy, and think that social housing is more readily available than it actually is.[50]

At the time of writing, the operation to cover the shell of Grenfell Tower was ongoing, five months on, prolonged by the complexity of the task. It provides a timely and grim metaphor for housing in the UK at the end of 2017: there is no quick fix for tackling the crisis. It requires a different, multifaceted and bolder approach. Now, more than ever before, is surely the time for housing policy in the UK to put people before prices and profit. ●

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BELIEF IN THERESA MAY AS A CAPABLE LEADER HAS FALLEN 23 POINTS TO 45% SINCE SEPTEMBER 2016 [51]

Was 2017 the year that 'brand purpose' lost its purpose?

58% OF PEOPLE DON'T TRUST A BRAND UNTIL THEY HAVE SEEN PROOF IT HAS KEPT ITS PROMISES

WAS 2017 THE YEAR THAT 'BRAND PURPOSE' LOST ITS PURPOSE?

BY JON HARPER
Head of Client Offer, Ipsos Connect

When is doing good not good for you? In the last decade, brands have increasingly sought to portray themselves as the doers of good as well as makers of money, so that the wider community benefits. However, the results are not always as positive as the brands may have hoped for, as several high-profile examples from 2017 show.

Of course, some companies have been successful in their pursuit of 'brand purpose'. Unilever has led the way in demonstrating how brands can achieve social good and make profits. Their long running 'dirt is good' campaign for Persil has been re-invigorated in the UK – now 'dirt is critical'. A new thought-provoking campaign unveiled the startling statistic that prisoners now spend more time outdoors than children. Not only did this hard-hitting campaign result in getting more kids to play outside as part of Outside Classroom Day, it also sparked a turnaround in business fortunes.[52]

Was 2017 the year that 'brand purpose' lost its purpose?

Source: www.youtube.com/watch?v=8Q2WnCkBTw0

2017 – a backlash builds

But, not all brands have been successful in combining purpose and profit. The missteps of some brands and a lack of robust data proving a causal effect between purpose and profit have led to questions about whether 'purpose' should be central to brand strategy. What about just making decent products for a fair price?

When it came to campaigns that aimed to communicate purpose, there is no doubt that 2017 was characterised by controversy. Brands faced a torrent of criticism [Pepsi], and heated debate about whether 'purpose sells' [Heineken].

Source: www.youtube.com/watch?v=8wYXw4K0A3g

The torrent of criticism – Pepsi

This misconceived ad appropriated images from the Black Lives Matter movement in the US, and culminated in a scene of 'shared joy' as Kendall Jenner offered the gift of Pepsi to ease tensions between protesters and police. A can of Pepsi as a unifying force for good? Well, that seems like a bit of a stretch! Perhaps more damningly, the advert felt like virtue signalling without a cause – what issues were Pepsi taking a stand on? Unsurprisingly, the ad was swiftly pulled.

Does purpose sell? – Heineken

Heineken's 'Worlds Apart' ad, which placed people with radically opposing views in a room together, certainly produced a lot of earned media. As the scenario played out, differences were revealed, followed by the protagonists grasping the opportunity to find some common ground. This is certainly fascinating, original, and resonant with the cultural context of 2017 (all good so far). But, the critics piled in with the obvious question – will it sell more Heineken? For them, the main issues were the lack of brand presence and an obvious reason for Heineken to be the brand you would naturally turn to for a friendly chat about your differences.

Was 2017 the year that 'brand purpose' lost its purpose?

IF YOU ARE GOING TO STAKE YOUR BRAND TO A CAUSE, MAKE SURE IT IS ONE THAT RESONATES WITH YOUR BRAND'S 'BEST SELF'

Purpose for purpose sake

For some brands, it is starting to feel like 'purpose for purpose sake'. If you are going to stake your brand to a cause, make sure it is one that resonates with your brand's 'best self'.

Many brands are fundamentally failing to recognise that a brand must connect with people first and resonate in a credible way – that's how you sell. Your purpose is your reason for being, the ethos and essence of your organisation that you can uniquely deliver to your consumer. So, you must be worthwhile, not glibly attaching the brand to a social cause that you cannot credibly claim to contribute to. That is just not going to cut it in the long run.

Our 2017 data has shown unprecedented levels of distrust in brands and their advertising – 43% of people say they trust advertising less than they used to, compared to only 8% who trust it more now.[53] The desperation to be associated with doing good must ring true – a hollow message lacking in credibility will inevitably fall flat. Fifty-eight per cent of adults don't trust a brand until they have seen 'real world proof' that it has kept its promises![54]

Where have all the great campaigns gone?

There is also a danger that we are starting to ignore one of the fundamentals of advertising – to have impact you must get people's attention and link that to your brand.

The Heineken work was well crafted, thoughtful, and did get lots of attention. So, perhaps the biggest issue with the Pepsi ad was its generic identikit blandness. Sixty per cent of British adults were unaware of the Kendall Jenner Pepsi ad, and only 18% saw it.[55]

We should concentrate on creating distinctive, original work that people are prepared to give the time of day – work that associates the brand with things they care about. You don't have to save the world (unless you can credibly help and the social cause is intrinsic to your brand), just make sure you compellingly and credibly engage with people so you can make their lives a little bit better.

Half of people (48%) say they talk about advertising less than they used to.[56] If we don't get back to making personally relevant and distinctive campaigns, then these worrying trends in people's reaction to advertising will continue. The multi-screen, multi-tasking world makes it harder to cut through, and it's ironic that advertising seems to be less part of this cultural conversation than it used to, despite trying harder than ever to associate itself with the big issues of the day. ●

IT'S THE CULTURE STUPID

It's the culture, stupid!

BY OLIVER SWEET
Head of Ethnography, Ipsos MORI

When James Carville wrote 'It's the economy, stupid' on the wall of Bill Clinton's campaign HQ in 1992, he distilled every election campaign ever into one memorable phrase. And it makes sense, because every US President that has won the election has also won the economic argument - that is that they have the best plan for managing the economy. Except, of course, for Donald Trump. Trump is the first president to lose the economic argument and to win the election. He did this through cultural, rather than economic means - by focusing on the issues important to the 'forgotten' voters.

Political allegiances have been shifting in recent years, away from ideological divisions that characterise how to approach the political economy, and towards identity politics whereby certain groups are incentivised or prioritised in a more emotional message. By playing to people's emotions – be that making a country great again, or taking back control – politicians are appealing to voters along cultural rather ideological lines.

Finding cultural tensions

Whatever people think about him, Trump realised that the daily realities of people across America were at odds with the way politicians were talking about them. He said things people thought were unsayable in politics, and people loved it, because he sounded like one of them. He recognised a cultural tension between politicians and normal people, and used it to great effect.

Cultural tensions surround us, and can be exploited by politics, marketing, advertising, social policy, and organisational structures. But to utilise this powerful, and often intangible tool, you need to first understand it – a task that is easier said than done.

The researchers' conundrum

Researchers love a good question, but when it comes to culture, it gets tricky. People learn culture through copying culture, not by being taught it. While we may be aware of certain elements of our culture – like the British desire to form an orderly queue or the pathological need to apologise for things that are not our fault – there are many elements of our culture that shape our behaviour without us even knowing. Analysing culture requires you to read between the lines, to find ways in which people's shared understanding of signs, symbols and myths, and their shared expectations around behaviour, creates social order. Daniel Miller's simple yet instructive description of culture as 'learned behaviour' adds to the idea that culture is absorbed by people on a daily basis, through an osmosis-like process, that comes to shape our outlook, attitudes and behaviours.

As we try to understand humanity, we need to recognise these truths and adopt methods that don't rely on questions and answers. Cultural intelligence needs to come from three crucial sources:

- **Ethnography:** sometimes we need to literally 'walk a mile' in people's shoes to understand what they do, how they do it, and where they learned it from. Observing people's behaviour tells us a lot about their shared understanding and expectations.

- **Semiotics:** the shared and unspoken understanding that a group of people have with signs, symbols, colours and stories can be classified and deciphered. Understanding these expectations tells us what consumers are seeing when there are no words.

- **Applied Anthropology:** when the academics remove their elbow patches and get their hands dirty, we find their principles are just as applicable to Western popular culture as it has been to the tribes in the Western Pacific. Applying the principles of anthropology to today's problems give us insight beyond what people tell us.

Using these principles prevents us from relying on questions as our main form of investigation.

It's the culture, stupid!

Principles in practice – people's health

As President Trump's victory shows us, campaigns, products and policies that resonate with our culture (or cultural tensions) can be more successful than those that appeal to us on a more rational level. As a public body with limited funds and an important mission to improve our health, Public Health England came to us wanting to better understand the culture surrounding health so they could create a campaign that could change behaviour.
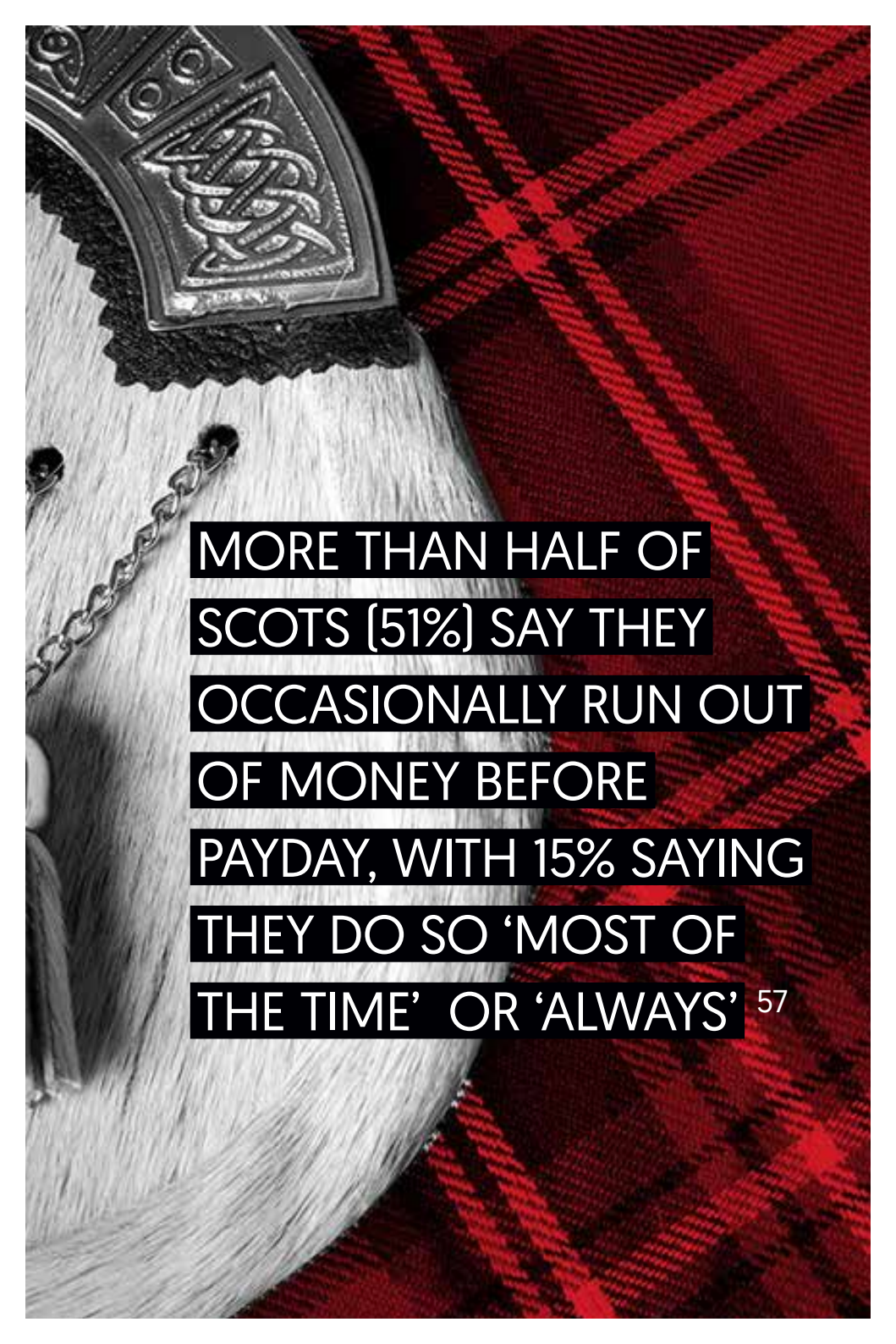
Health is an example full of cultural tensions in the UK. Our semiotics exposed an emergent cultural image of 'health and wellness' promoted by experts, gyms, magazines and brands. Crucially, however, our ethnographic research presented us with families at odds with this image. It showed people struggling to spend 'quality time' with each other, exhausted after a heavy week of work, faced with financial pressure from rising costs and stagnating wages, as well as social pressures to buy things they can't afford. Inevitably, this daily pressure leads to a glass, or two (or three) of wine each night, combined with 'seconds' or 'thirds' at dinner time, and a night on the sofa with a box set, allowing for little or no conversation.

It's not difficult to see the tension between the Instagram images of health and beauty, and the daily realities experienced by British families.

Public Health England took our insight and decided to deal with this tension head on. Their One You campaign has been rolled out with great success. At the heart of the campaign is an advert addressing this cultural tension, and promoting a slightly more realistic view of what health could be to British families.

While it is still too early to tell if One You has started a health revolution, it has clearly struck a chord with many of us – more than one million people have now taken the online test or downloaded the app. ●

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MORE THAN HALF OF SCOTS (51%) SAY THEY OCCASIONALLY RUN OUT OF MONEY BEFORE PAYDAY, WITH 15% SAYING THEY DO SO 'MOST OF THE TIME' OR 'ALWAYS' [57]

What worried the world?
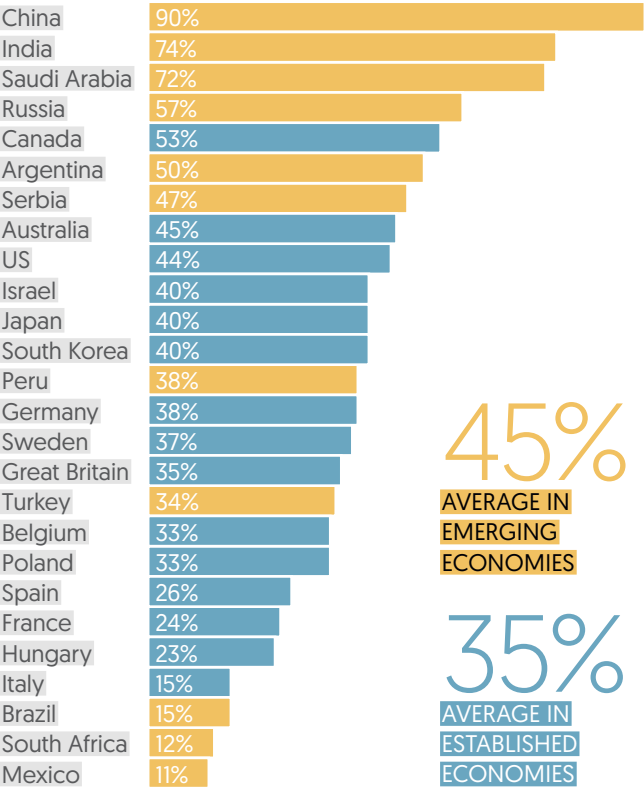
UNEMPLOYMENT REMAINS THE BIGGEST WORRY GLOBALLY [36%], AS IT HAS DONE EVERY MONTH SINCE 2010 WHEN OUR SURVEY BEGAN

WHAT WORRIED THE WORLD?

BY MICHAEL CLEMENCE
Research Manager,
Ipsos MORI Social Research Institute

How was 2017 for you? Across the year, our What Worries the World poll has gathered the views of citizens in 26 countries every month, finding out how they think things are going and what they see as their country's biggest concerns. Here is a rundown of who worried about what, and where, in 2017.

Around the World

Unemployment remains the biggest worry globally (36%), as it has done every month since 2010 when our survey began. Close behind is corruption and financial/political scandals (35%), which has cemented second place, above poverty and social inequality, since 2016. The latter now stands in third (33%). For established World Worries watchers, August this year marked a watershed; it was the first month when unemployment was not the sole biggest concern. It was tied with worry about corruption on 34% apiece.

The global divide between optimists and pessimists also continues – worldwide, four in ten are optimistic about the direction of their country (39%), and six in ten think their country is off on the wrong

What worried the world?

% who think their country is headed in the right direction

Country	%
China	90%
India	74%
Saudi Arabia	72%
Russia	57%
Canada	53%
Argentina	50%
Serbia	47%
Australia	45%
US	44%
Israel	40%
Japan	40%
South Korea	40%
Peru	38%
Germany	38%
Sweden	37%
Great Britain	35%
Turkey	34%
Belgium	33%
Poland	33%
Spain	26%
France	24%
Hungary	23%
Italy	15%
Brazil	15%
South Africa	12%
Mexico	11%

45%
AVERAGE IN EMERGING ECONOMIES

35%
AVERAGE IN ESTABLISHED ECONOMIES

Source
Ipsos Global Advisor/What Worries the World

Base
193,600 adults aged 16-64 (18-64 in US and Canada) in 26 countries, interviewed online Jan-Oct 2017

track (61%). As we noted in our Global Trends report,[58] there is an optimism divide between the generally more optimistic emerging markets (with some significant exceptions in Brazil, Mexico and South Africa), and more uniformly downbeat established economies such as Spain, France and Germany.

WHAT BRITAIN WORRIED ABOUT – JAN-OCT 2017

Which three of the following topics do you find the most worrying in your country?

TERRORISM
HEALTHCARE
POVERTY
IMMIGRATION
EXTREMISM

JAN 2017

OCT 2017

Source
Ipsos Global Advisor/What Worries the World

Base
c. 1,000 adults aged 16-64 in Britain, interviewed online between Jan-Oct 2017
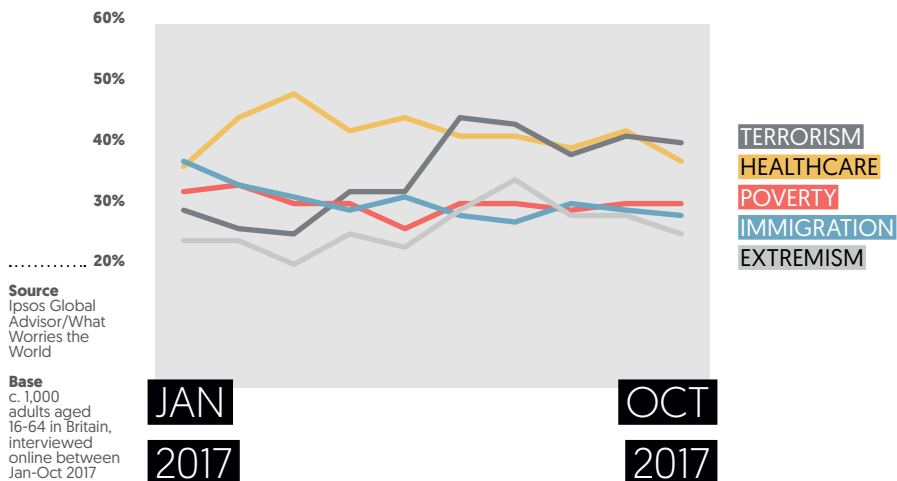
The steady global average conceals some big swings – none more so than in South Korea. Belief that the country was headed in the right direction rose by 50 percentage points between May and June, coinciding with the election of President Moon Jae-In following the impeachment of the former leader, Park Geun-Hye, and her arrest on corruption charges.

At home

Britain continues to have a very different outlook to many other countries. We started the year with control of immigration very slightly ahead of healthcare at the top of our list of worries. But concern about healthcare and terrorism have both risen during 2017.

2017 has also seen Britons become more pessimistic about the direction of the country. Initially we looked to have shrugged off any Brexit wobbles; April was a high watermark, with 44% feeling we were heading in the right direction. Since then, optimism has tumbled to 33%, lower than where we started in January (36%). For a few months after the June General Election we had the dubious

What worked the world?

% agree that country is headed in the right direction

May 2017
French Presidential Election

June 2017
British General Election

BRITAIN
FRANCE

Source
Ipsos Global Advisor/What Worries the World

Base
c. 2,000 adults aged 16-64 in Britain and France interviewed online between Jan-Oct 2017
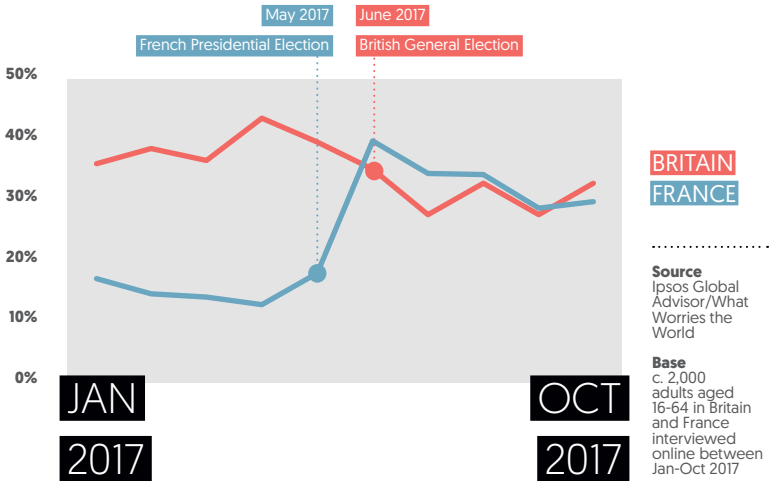
distinction of being even less optimistic than the French – they were uncharacteristically upbeat for a few months following the election of President Macron. Their traditional ennui is now returning.

Adjusting the optimism divide

Our measure of the optimism of the world has shown a reasonably stable trend since its inception, with around six in ten feeling their country is on the wrong track, and roughly four in ten thinking things are looking up since 2010. However, this is to some extent due to our 'United Nations' style approach, with the views of each country given equal weighting. Once we tip the scales by weighting by population-size we get some reassuring news.

Two-thirds of the world are optimists while pessimists shrink to a third of the population, reflecting the views of people in countries like China and India, where despite challenges, living standards are rising dramatically.

DIFFERENT MEASURES OF OPTIMISM
Comparison of global optimism – standard and proportional

STANDARD WEIGHTS

39%
OPTIMISTS

61%
PESSIMISTS

POPULATION PROPORTIONAL WEIGHTS

64%
OPTIMISTS

36%
PESSIMISTS

While unemployment and corruption remain the top two issues however you look at it, there are some significant shifts when we give more populous countries greater heft in the data: fears about inequality fall by twelve percentage points, and the proportion concerned about threats against the environment rises by the same amount. Concern about climate change also rises by six percentage points, from nine to fifteen per cent.

What this tells us is that despite their greater optimism, the climate and environment are much more pressing concerns for the bulk of the world's population, many of whom live in the large and growing emerging economies.

The future

And what might we worry about in 2018? Perhaps, ten years on from the global financial crisis, our preoccupation with unemployment will finally be eclipsed by worries about political scandals and corruption, or inequality. Whatever happens, the split in optimism – and what is considered important – between emerging and established economies looks set to remain. ●

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Virtual Reality: the hype and the hope

VIRTUAL REALITY:
THE HYPE AND THE HOPE

BY RICHARD GARNHAM
Associate Director – Innovation, Ipsos MORI

Nearly half of the British public (46%) cannot see a practical use for virtual reality (VR).[59] Are the technology and media industries flogging a dead horse, or, like the iPad and Amazon's Alexa, will consumers find VR indispensable once they've given it a chance? After all, as Henry Ford put it in the late 19th century, when asked what they wanted for personal mobility, most people would have requested "a faster horse".

VR headsets are pretty clunky devices that cover half your face, which at the moment can hardly compete with the ease and ubiquity of television, cinema, social media, and radio. For many people, their first experience of VR is using Google Cardboard – which transforms an ordinary smartphone into a rudimentary VR headset – but those who do persevere with VR begin to get more and more value from it as they become increasingly familiar with it.

In partnership with the BBC, we conducted an in-home, ethnographic VR study. Over a 6-month period, we followed our participants' journeys from consuming gimmicky, easy to find content (e.g. Rilix Coaster), to spending time searching for

DESPITE THE ENGAGING NATURE OF THE CONTENT, WE FOUND THAT PARTICIPANTS TYPICALLY SPENT NO LONGER THAN 10-20 MINUTES ON VR EXPERIENCES

interesting, purposeful VR [e.g. David Attenborough's 'Attenborough and the Dinosaurs'].[60] This allowed them to do something they wouldn't normally be able to do, such as travelling through space, or something that cannot be conveyed by other platforms, like losing your sight or exploring the body from a cellular level. This type of content had a unique value and stayed with them. But despite the engaging nature of the content, we found that participants typically spent no longer than 10-20 minutes on VR experiences.

"THE BIGGEST BENEFIT FOR THIS IS THAT I'M WATCHING THIS I'M NOT DOING ANYTHING ELSE, AND THEN THE SENSE OF SCALE. SO [IN DAVID ATTENBOROUGH AND THE DINOSAURS] HE SAYS I COULD TALK ABOUT HOW LONG 50 FEET IS, BUT HERE IT IS. THEN THE THING WALKS PAST YOU AND IT TAKES A PARTICULAR PERIOD OF TIME TO WALK PAST YOU. OK, NOW I GET HOW LONG 50 FEET IS; I CAN VISUALISE THAT."
Male, 18-44,

However, under the right conditions, people *will* watch hours of footage, without losing engagement. Our work with the Royal Shakespeare Company – which sought to understand if our emotional response to VR differs significantly between live theatre performance, cinema screening and 360-degree video recording of Shakespeare's Titus Andronicus – highlighted the importance of taking time to adjust the headset and finding a comfortable chair to sit in![61] Despite the immersive quality of VR, for live theatre

performances, our participants found that nothing quite compares to the smell of the greasepaint and the roar of the crowd. However, VR is much more engaging than ordinary cinema – 91% of participants during the 360-degree VR experience had moments of feeling completely immersed, as if actually present at the live theatre performance.[62] This has big implications for Hollywood.

Key lessons:

- **Narrative cues are required to focus the attention.** The immersive nature of VR can be disorientating and without narrative prompts to focus the viewer's attention they can miss key moments.

- **Don't cognitively overload the viewer.** Due to its immersive nature VR can overwhelm the viewer. They are being given more stimuli than they are used to and, as such, they need time to process the experience.

- **Encourage eye contact to promote the feeling of embodiment.** Eye contact makes the viewer feel present in the experience. This presence makes the experience more engaging.

- **Embrace the uniqueness of VR.** Play with scale, 360-degree positioning, or other techniques that highlight the distinct benefits of VR over other platforms.

- **Remember our need states: empathy, learning, relaxation, and exploration.** The types of experiences that resonate most keenly with viewers are those that make them feel relaxed or immersed; that transport them to far off places or unexplored territories; experiences that teach them something or encourage empathy.

- **Prioritise storytelling.** VR is disorientating; setting objectives, and guiding the audience is key. Narratives should be a well-considered with clear narrative structures – just like any other content you consume.

We believe VR in-home entertainment has huge potential, but for it to see mass uptake, the hardware, platforms, and content will need

Virtual Reality: the hype and the hope

to provide a more coherently seamless experience. Maybe it will start with cinemas? A permanent VR cinema[63] has already opened in Amsterdam, with another set to open in London at the end of 2017.

2018 may be the year this happens. The first subscription model for a VR app store that allows consumers to explore, create, connect, and experience content – HTC's Viveport – was launched in 2017. The BBC has committed to creating a small number of high impact productions for VR and aims to encourage the fragmented industry to develop standards that will allow VR to flourish.

Make no mistake: VR has the potential to transform the way we consume short and long-form content. ●

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69% OF CONSUMERS DISTRUST ADVERTISING [64]

The death of #cleaneating?
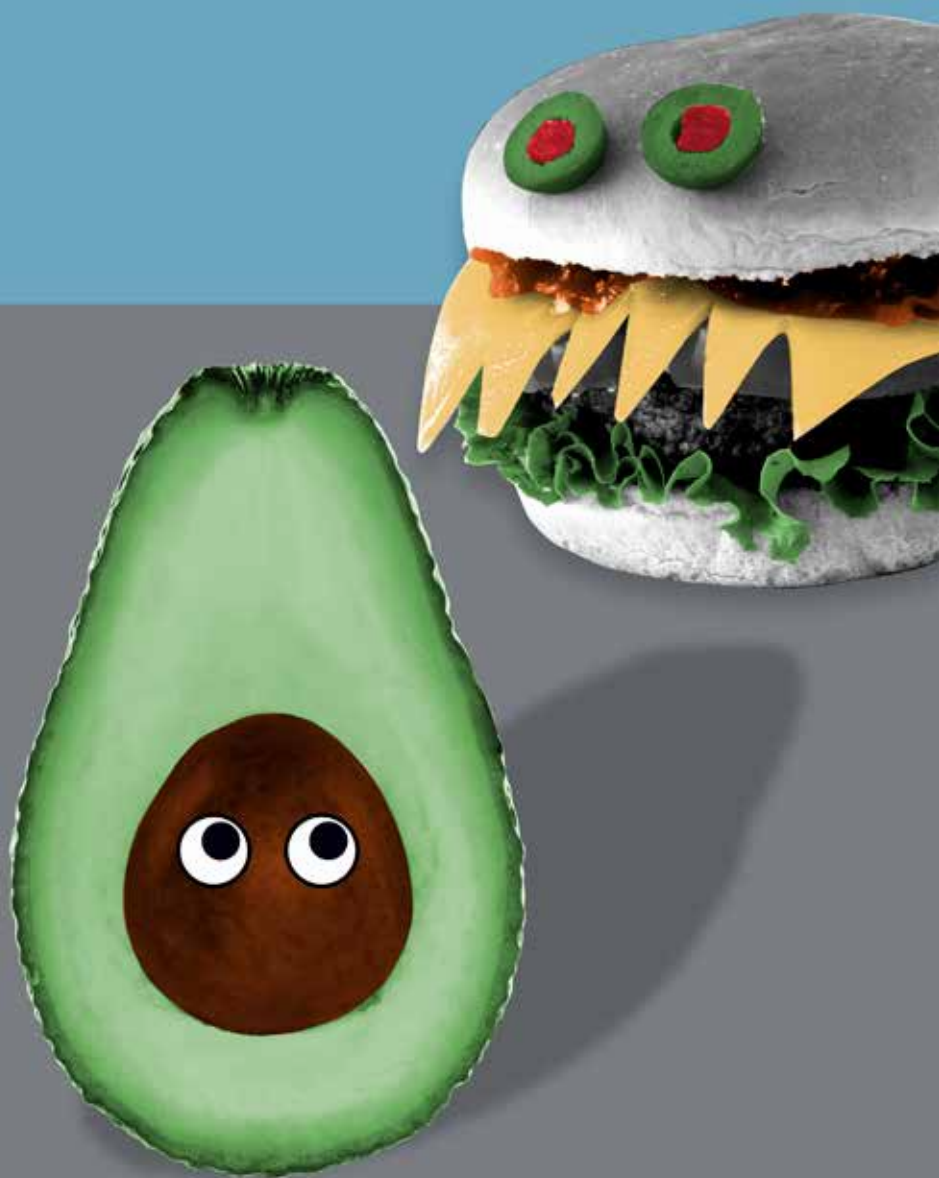
THE DEATH OF #CLEANEATING?

BY MONIQUE CENTRONE
Semiotics Lead, Ipsos MORI

Was 2017 the beginning of the end for #cleaneating? While criticism has been building amongst celebrity chefs such as Nigella Lawson and Ruby Tandoh for a number of years, the science behind 'clean eating' – which, at its core, means eating nothing but 'whole' or 'unprocessed' foods – came under attack from many sources. The American Heart Association suggested that coconut oil, beloved of clean eaters, had "no known offsetting favourable effect" and could actually result in higher cholesterol. An investigation by BBC's Horizon found sparse scientific evidence of the benefit of various 'clean eating' diets and even some examples of serious malpractice by those promoting them.[65] But science is often not what settles a cultural phenomenon.

Diets are certainly nothing new – fans of the BBC programme 'Further Back in Time for Dinner' will have witnessed the Robshaw family trying the 1930s Hollywood Diet – and the element of morality that is often part of dietary choice also remains at play in clean eating, making adherence to the regimen more akin to religious devotion. Cleanliness is next to godliness, as the saying goes. Across many different cultures (since at least biblical times),

EIGHT IN TEN OF US AGREE THERE IS SO MUCH CONTRADICTORY INFORMATION THAT IT IS HARD TO KNOW WHO OR WHAT TO TRUST

cleanliness has been associated with morality. Foods like coconut oil and avocado – two buzzwords or 'cues' of the trend – are fraught with associations for those faithful to 'clean' eating. These foods become a badge to wear, to shout to the world that you're clean, pure and therefore moral.

And a belief system requires a community of believers. Clean eaters proclaim their faith to a different kind of community, via hashtags, photos and tweets, flaunting their pure identity. At Ipsos we have analysed this to understand the mission of the faithful, their perseverance and discipline, sometimes riddled with their regret. Their 'proclamations', in the form of photos and hashtags [look at #healthy, #foodporn #organic #gluten-free #vegan #natural #strength #motivation] are the way believers develop their public identity, enacting their 'clean' nature – their purity and morality.

The endless photos of 'clean' food and recipes identify the clean eater as not only pure, but purer than others eating 'dirty' food. 'Dirty' food, such as burgers or fried chicken, are now the trendy flipside of clean eating. As consumers, we classify nearly everything we see in these oppositions [or binaries] without even knowing it – heaven and hell, good and evil, happy and sad, mother and father. Binaries, rather than rational thought processes, underpin the shortcuts our brain uses to make snap judgements, from what is clean [clean/dirty] to what is luxury [luxury/poverty] or quality.

The owners of Dirty Burger, who proudly celebrate being the opposite of clean, tap into this implicit meaning, saying they "wanted something that was utterly delicious, but really naughty. A totally bad boy burger". Whereas Nigella Lawson, whose recipes exemplify the indulgent, sensuality of comfort food, refers to clean eating with the term "disgust", because what she promotes is considered 'dirty' in the world of clean eating.

Our work on understanding the foundation of this proliferation of definitions around clean eating suggests that it ultimately derives from a crisis of authority. Our Global Trends survey shows eight in ten of us agree there is so much contradictory information that it is hard to know who or what to trust.[66] This easily applies to nutrition information, whose experts are often giving contradictory advice. One response to this is the development of personal/niche definitions of clean foods that alternately disregard expert knowledge around nutrition, and look towards other external validation or guidance. About half (54%) of us claim to be overwhelmed by the choices we must make in our lives and this extends to the number of choices consumers need to make around their diet. As my colleague Pippa discusses elsewhere in this publication, people's shame around consuming too much sugar is not dissimilar to the shame of tax dodging.

Unlike some religions, where the rules and practices spell out exactly what foods can and cannot be eaten, clean eating can mean different things to each adherent – green foods, veganism, or soy. The ambiguous nature of clean eating means that food brands have had a difficult time making use of the trend in any substantive way. However, given that John Lewis' sales of vegetable spiralizers fell by 40% this year,[67] and we have, apparently, hit peak avocado,[68] this trend may be on the way out. The concept of 'clean', at least for the moment, may be better left to shampoos and laundry detergents. ●

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Is the public willing to put their money where their mouth is on the NHS?

IS THE PUBLIC WILLING TO PUT THEIR MONEY WHERE THEIR MOUTH IS ON THE NHS?

BY KATE DUXBURY
Research Director,
Ipsos MORI Social Research Institute

One of the enduring stories of 2017 has been the pressure on the NHS – both financial and demographic. But this is having very little impact on the public's ideals for the NHS, and what they expect it to provide for them and their families, posing real choices for government and the voters.

The public want the NHS to stay true to its founding principles. Nearly everyone says that the NHS should be free at the point of delivery (91%); be primarily funded through taxation (88%); and provide a comprehensive service available to everyone (85%).

With the NHS celebrating its 70th Anniversary next year, three-quarters of the public say that it is crucial to British society and we must do everything to maintain it (77%). These findings have remained remarkably constant since 2000, with the public's expectations unaffected by the financial pressures on the NHS, or austerity.

So far, the NHS continues to deliver in the public's eyes – nearly three-quarters say that NHS services generally meet or exceed

Is the public willing to put their money where their mouth is on the NHS?

THE PUBLIC ARE STILL BOUGHT INTO THE IDEAL OF THE NHS AND ARE KEEN TO PROTECT IT

Which of the following statements best reflects your thinking about the NHS?
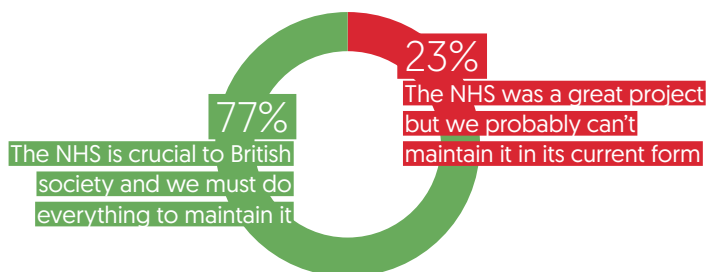
23%
The NHS was a great project but we probably can't maintain it in its current form

77%
The NHS is crucial to British society and we must do everything to maintain it

their expectations [73%]. But a new financial settlement is needed to continue delivering these services and standards.

So is the public willing to put their money where their mouth is on the NHS?

Our data suggest that the public is willing to do what it takes to maintain the NHS. Nearly all cite the NHS/Healthcare as a main area of public spending that should be protected from cuts [88% – schools are the second most frequently cited at 56%]. When presented with three options for the future of the NHS, 66% say they would personally be willing to pay more taxes to maintain the level of spending needed to keep the current level of care and services provided by the NHS. In contrast, only 20% think we should reduce funding on other services such as education and welfare to maintain NHS funding, and just 10% say that the level of care and services provided by the NHS should be reduced.

This suggests that politicians may be able to have an adult conversation with the public about what they are willing to pay for.

THE PUBLIC CLAIM THEY ARE WILLING TO PAY MORE TAXES IN ORDER TO MAINTAIN THE CURRENT LEVEL OF CARE & SERVICES THE NHS PROVIDES

Which, if any, of the following would you most like to see?

66% — I would be willing to pay more taxes in order to maintain the level of spending needed to keep the current level of care and services provided by the NHS

20% — Reduce spending on other services such as education and welfare in order to maintain the level of spending needed to keep the current level of care and services provided by the NHS

10% — Reduce the level of care and services provided by the NHS so that you do not need to increase the current level of taxation and spending on the NHS

5% — Don't know

Source
Ipsos MORI /
King's Fund

Base
805 English
adults aged
15+, 4-10 August
2017

However, it will not be an easy debate once the public considers the reality of more direct taxation, particularly when half think the NHS often wastes money (51%).
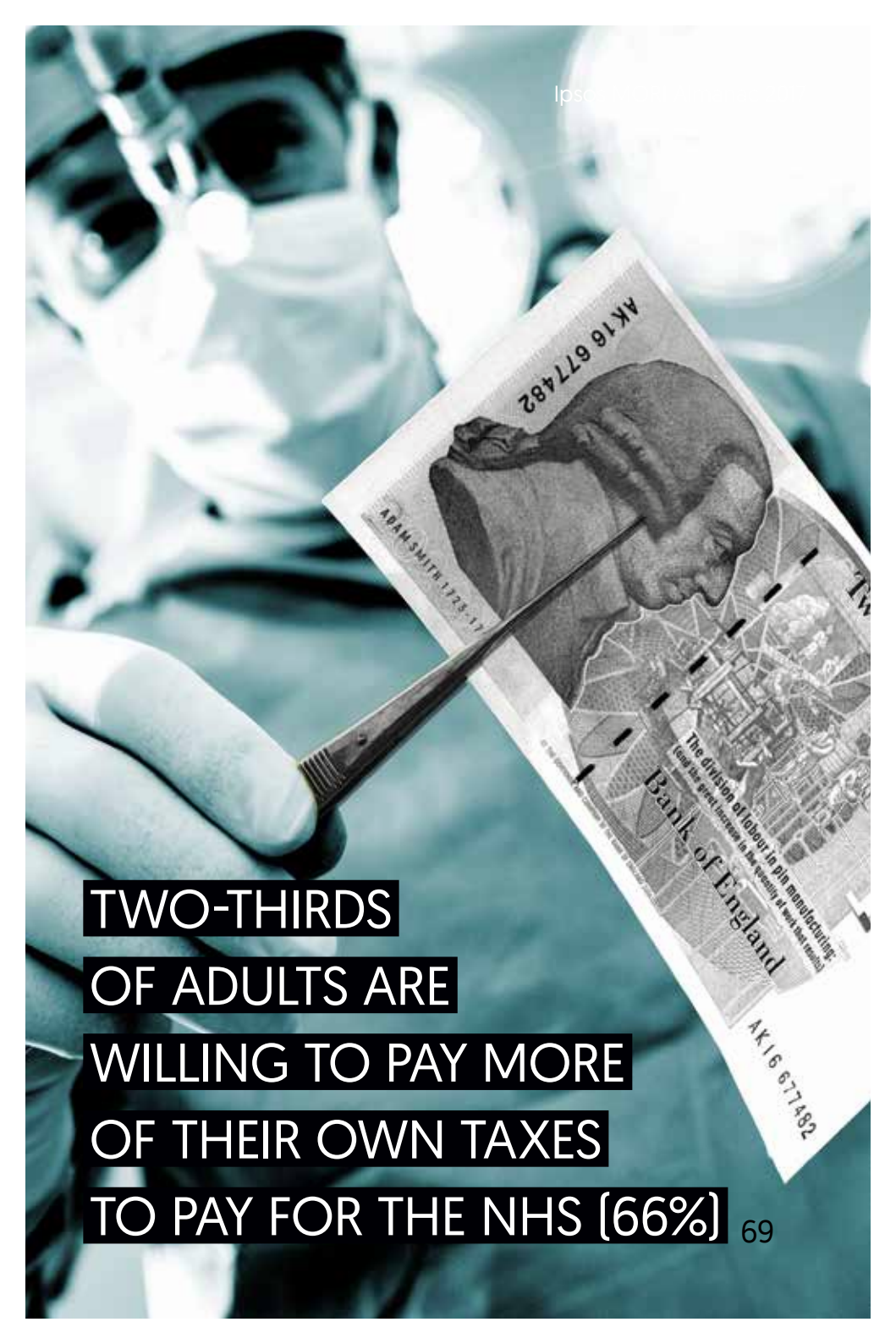
There are nuances to the debate: *how* people pay more matters, not just whether or not they do. For example, increasing National

Is the public willing to put their money where their mouth is on the NHS?

Insurance charges are most acceptable to the public [53% say these would be acceptable versus 37% unacceptable] – it worked for Tony Blair, who increased National Insurance by 1% and saw concern about the NHS fall. Increasing income tax is less popular [50% say it would be unacceptable]. Other ways of increasing funding that are more appealing to the public are increasing charges for visitors from outside the UK [74% say this is acceptable] and charging patients for missing appointments [71%]. Even some form of rationing [charging patients who have diseases/illnesses caused in some way by their lifestyle] is more acceptable than increasing income taxes [44% versus 40%].

This means that any debate with the public will need to be wide-ranging, and delaying it will make hard choices even starker. ●

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TWO-THIRDS OF ADULTS ARE WILLING TO PAY MORE OF THEIR OWN TAXES TO PAY FOR THE NHS (66%)

69

The retired prince

THE RETIRED PRINCE

BY SARAH CORKER
Associate Director, Ipsos Marketing

This year Prince Philip, Duke of Edinburgh, officially retired at the ripe old age of 96. After 64 years of service and with 22,219 solo engagements under his belt, the Duke may find himself in a state of retirement shock. His wife is still working, and adult children and grandchildren have well and truly flown the nest, so what lies ahead for the longest-serving royal consort in British history?

He retires in an era where retirement is no longer seen as the final days of one's life, but instead a new chapter of fun and exploration. Our research shows that many think their lives will improve once they stop working – around two in five (39%) think they will have a better social life and 24% think they will have a better standard of living. Similar proportions of those who have already retired report the same.[70] So is life set to get even better for HRH?

At 96, he's seen lots of changes over his lifetime. When he was born in June 1921, the life expectancy for men in the UK was only 56,[71] the state pension and the welfare state were still decades away, and 'retirement' as we know it did not exist – people

AROUND A QUARTER (26%) THINK THEIR RELATIONSHIP WITH THEIR SPOUSE OR PARTNER WILL IMPROVE IN RETIREMENT

typically only lived a year or two after stopping work. The world he retires into is a very different one. Life expectancy for men has risen to 79 years. This has had a huge impact on pension policy, with the state pension age due to rise to 66 in the next three years, and responsibility for pension planning falling to individuals, rather than employers or the state. Many people approaching retirement find they are not in a position to live comfortably on their savings. Millennials, those born between about 1980 and 1995, are particularly hard-pressed – with many fearing they might never retire.[72] Many people go through a phase of semi-retirement before giving up work completely, the Duke included.

So what can a man who has seen nearly a century of change expect of his retirement today?

For many, retirement is an opportunity to spend more time with close family and friends. Around a quarter (26%) think their relationship with their spouse or partner will improve in retirement, with 21% thinking they will get along better with their children.[73] However, with the Queen showing no sign of hanging up her robe just yet, Prince Philip may have to focus his attention on other ambitions.

Pre-retirees tend to have many different aspirations for retirement. Holidays and travel generally top the list. Though considering the Duke has accompanied his wife on many of her 217 foreign trips, and travelled the world during his naval service, this may not be a priority.

WORKING AGE PEOPLE HAVE MANY ASPIRATIONS FOR THEIR RETIREMENT

Many people have specific hopes and aspirations for their retirement. Which, if any, of the following are important aspirations for you?

Frequent holidays
54%

Spending more time with friends and family
51%

Extensive travel
36%

Home improvements/gardening
30%

Taking more exercise/playing more sport
27%

Learning a new skill/hobby
26%

Charity/voluntary work
24%

Continuing to work to some extent
23%

Living abroad
16%

Buying a new car/other expensive item
11%

Learning a foreign language
10%

Further education
9%

Writing a book
8%

Starting a business
6%

Home improvements [30%], taking more exercise [27%], or learning a new skill/hobby [26%] are also common aspirations.[74] Though considering Buckingham Palace is set for a renovation, this is perhaps not on the top of his agenda either.

The retired prince

Charity work [24%] is also a popular aspiration, and as a patron, president or member of more than 780 charities and organisations he is no stranger to charity, so philanthropic pursuits are still likely to feature in Philip's life.

Retirement can be a time to focus on one's health. With more time to spend on healthy living, retirees are more likely than pre-retirees to rate their health as good for their age [40% of retirees rate their health as good for their age, compared to just 31% of pre-retirees]. With some recent concerns about Prince Philip's health, he may be feeling apprehensive about the impact this will have on his ability to enjoy retirement to the full. Common concerns about retirement include poor health impacting their

MANY ARE WORRIED ABOUT POOR HEALTH INTERFERING WITH VARIOUS ASPECTS OF THEIR LIFE IN RETIREMENT
Do you worry about poor health interfering with the following in your retirement? [Worry a little/a lot]

Ability to take care of myself
36%

My comfort [pain]
35%

My mental wellbeing [depression/anxiety]
31%

My level of physical activity [e.g. doing sports]
30%

My ability to do tasks around the house
30%

My financial wellbeing [my healthcare expenses]
30%

My ability to take care of others
26%

My ability to work
21%

My social life [seeing my friends and family]
17%

My sex life
14%

mobility [37%], ability to take care of themselves [36%], their comfort [35%] and mental wellbeing [31%].[75]

Indeed, retirees are doing more than pre-retirees to reduce the risk of poor health in the future. Around three-quarters eat a healthy diet [76%] or read, do puzzles and generally keep their brain active [75%] compared to 62% and 42% of pre-retirees respectively.

Whatever lies in store for the Prince, he should be financially comfortable throughout his retirement. The challenge for Britain is that, for many who are considering giving up work, this is definitely not the case. Our research consistently shows that many people are not adequately saving, and the state pension is unlikely to match what the Queen's husband might receive.

Since marrying a member of the royal family isn't a solution available to the vast majority of us, we need to look at other solutions. In order to have a retirement fit for a prince, you need to prepare – start saving early and save as much as you can. You can also prepare for old age mentally – those who are positive about ageing live, on average, 7.5 years longer than those who are negative. Something for us all to think about. ●

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The kids are alright – understanding Gen Z

THE KIDS ARE ALRIGHT – UNDERSTANDING GEN Z

BY HANNAH WHYTE-SMITH
Associate Director, Ipsos Connect

Generation Z (those born after 1995) have had a tough start. They have grown up in a post-9/11 world, have struggled through a recession, and are feeling the effects of austerity. They also look on track to be worse off than their parents. On the other hand, in their lifetime, they have seen marked improvements in social equality with the legalisation of gay marriage in many countries, improved gender equality, and they themselves are hugely accepting of multiculturalism.

Generation Z are coming of age in a post-digital era. As they start to enter our workforce, with greater spending-power and increased influence on society, how can business and government understand them better and communicate with them in a way which resonates? Our 2017 research highlights five key things brands need to consider when attempting to market to Gen Z.

The kids are alright – understanding Gen Z

They won't stand for inequality

Equality is non-negotiable for this generation; they are socially liberal. Recent research by Ipsos MORI and the BBC shows that equality issues are significantly more important to this generation than older generations, with around one in five saying racism is one of the most important issues to be addressed in Britain today.[76]

ISSUES OF EQUALITY ARE SIGNIFICANTLY MORE IMPORTANT TO GEN Z

Which three of the following issues do you think are the most important issues to be addressed in Britain today?
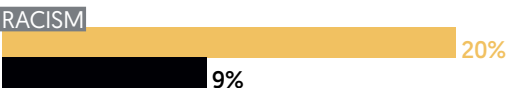
RACISM
20%
9%

GENDER EQUALITY
13%
4%

PREJUDICE TOWARDS LGBTQ+
10%
2%

GEN Z
OTHERS*

Gender, racial, and sexual equality are expected, and brands which don't share this stance will struggle to even be considered by Generation Z.

The liberal generation

Gen Z are significantly more sexually liberal than preceding generations; fewer Gen Z report that they are only attracted to people of the same sex [66%] than Millennials [71%], Gen X [85%], and Baby Boomers [88%].[77]

As well as their sexual liberation, they are also somewhat more politically liberal than previous generations. Generation Z are more open to free movement, with a significant amount saying

there should be no control on the free movement of people between different European countries [10% vs 7% Generation Y, 5% Generation X and 4% Baby Boomers]. Over half of Baby Boomers think there needs to be greater control on the free movement of people [52%], compared to Generation Z [28%].[78]

... But traditional values are still important

What's most important to Generation Z may not be what one would expect. Older generations perceive social media, socialising, and access to the internet as their priorities. But, this couldn't be further from their true priorities: family, education, and money – as well as equality.

Whilst they are socially liberal, they are traditional in their goals and ambitions. They believe that having a job they love, being financially well-off, and having a family will make them happiest in life. This is contrary to the perceptions of older generations – one in four [23%] think Generation Z want to be on TV/be famous, when in reality just 2% of Generation Z think that fame is the ticket to happiness.

Gen Z believe they are hard workers

When asked to choose three words to describe themselves the majority [38%] chose 'hard working', 'creative' [28%], and

MOST IMPORTANT TO GEN Z RIGHT NOW

WHAT OLDER GENERATIONS THINK IS MOST IMPORTANT TO GENERATION Z RIGHT NOW:

FAMILY 44%   SOCIAL MEDIA 47%

EDUCATION 32%   GOING OUT 40%

MONEY 29%   ACCESS TO INTERNET 39%

JOB THEY LOVE 20%
FINANCIALLY WELL-OFF 17%
FAMILY WITH KIDS 17%

WHAT OLDER GENERATIONS THINK THEY WANT

BEING FAMOUS/ON TV 23%

FINANCIALLY WELL-OFF 22%
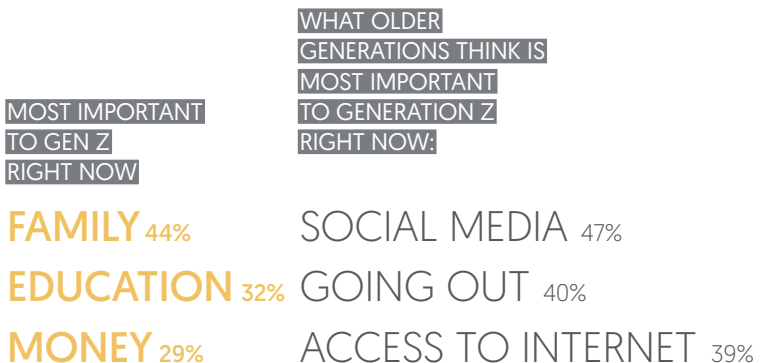
JOB THEY LOVE 19%

Source
Ipsos Connect and BBC

Base
1,003 16-22 year olds and 2,004 23-65 year olds, online, 25 Aug - 6 Sept 2017

'independent' [24%].[79] Gen Z's belief in hard work is indicative of their desire to tackle challenges head-on; they recognise that they won't benefit from being work-shy.

However, this view of Gen Z is not shared by older generations – when asked to choose three words to describe Gen Z the most common were 'selfish' [Millennials, 24%; Gen X, 27%; Baby Boomers, 29%], 'lazy' [Millennials, 22%; Gen X, 29%; Baby Boomers, 23%], and 'self-conscious' [Millennials, 24%; Gen X, 25%].[80] Gen Z – like Millennials before them – have a PR problem!

They are a growing and evolving cohort

Finally, of course Generation Z are still very young. As they grow up, the challenges they face and the environment they exist in will shape their views and preferences – just like the generations that go before them. It is important to understand that they are a complex and nuanced generation, who are both similar, and different to other generations, and understanding them is crucial. ●

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68% OF SMARTPHONE /TABLET USERS WITH YOUNG CHILDREN ARE ON THEIR DEVICES WHILE SPENDING TIME WITH THEIR KIDS

81
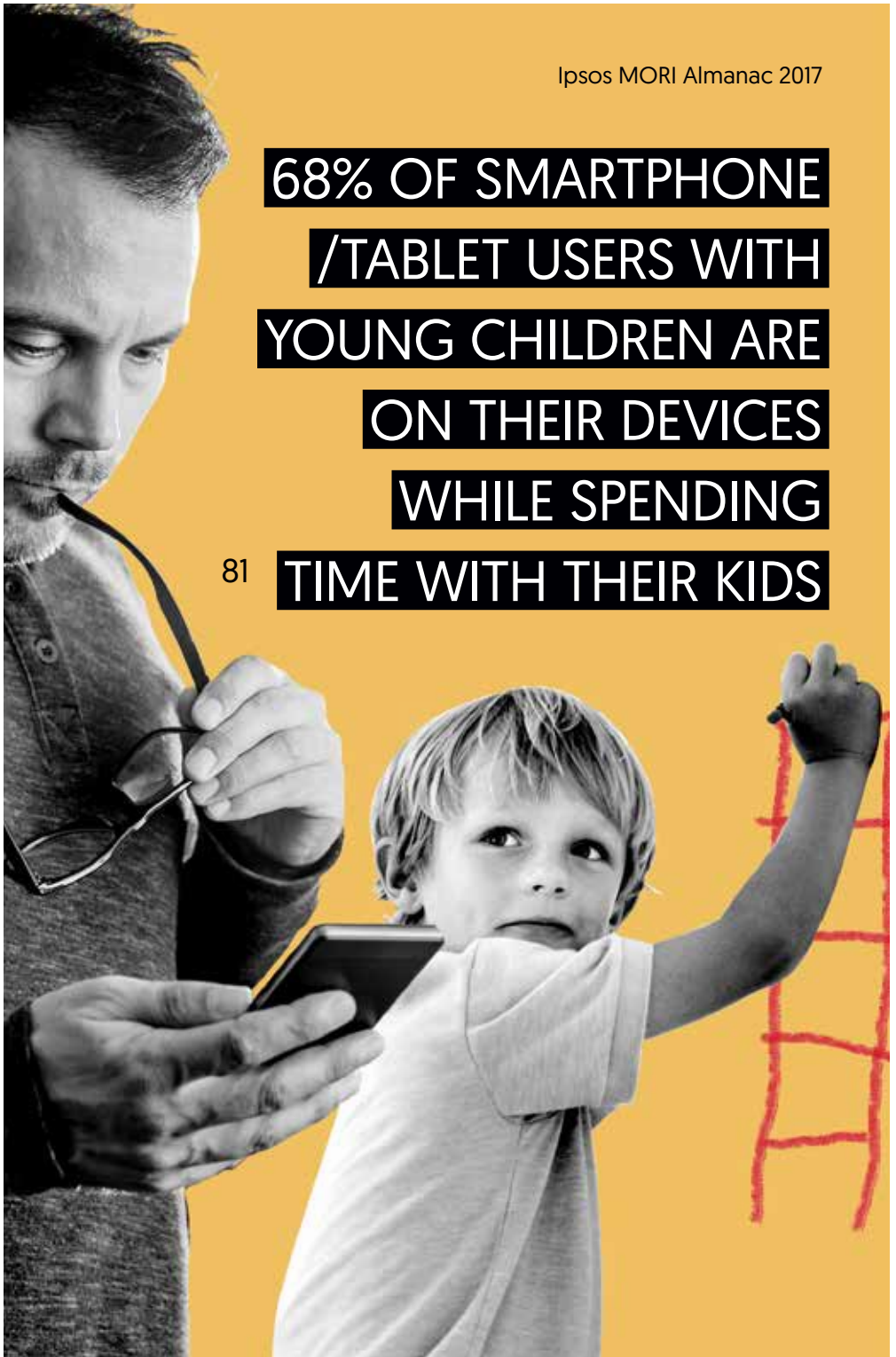
Great expectations – are service expectations really rising?

GREAT EXPECTATIONS - ARE SERVICE EXPECTATIONS REALLY RISING?

BY KATHERINE SHIPTON
Senior Research Executive, Ipsos Loyalty

In an age of instant online gratification and rapidly changing technology, do people now expect more than ever?

Expectations matter: they are often more important than an actual experience itself in how we judge companies. Even a positive experience can damage brand favourability if it does not live up to our expectations – 31% of British consumers who have a good experience that was lower than their expectations of the brand, say their favourability fell. Conversely – even an objectively bad experience can improve your brand perception if you were expecting a truly awful one – you may choose to fly Ryanair again if your experience is slightly less awful than you expected it to be. A fifth [19%] of those who have a negative experience, but one that was better than expected, increase their favourability of a brand. Expectations are critical to any brand story, but they work in subtle ways.

Five critical factors came out strongly as reasons why services exceed or fall short of our expectations. Final outcome and

Great expectations – are service expectations really rising?

CHANGES IN BRAND FAVOURABILITY AFTER A **POSITIVE** EXPERIENCE

CHANGES IN BRAND FAVOURABILITY AFTER A **NEGATIVE** EXPERIENCE

Better than expected	In-line with expectations	Worse than expected	Better than expected	In-line with expectations	Worse than expected
		10%		10%	4%
41%	17%	59%	19%	67%	32%
56%	79%		69%		64%
3%	4%	31%	12%	23%	

● Brand favourability decreased   ● Brand favourability stayed the same   ● Brand favourability increased

Source: Ipsos MORI

Base: Better than expected (n=2,388 experiences), In line with expectations (n=1,482 experiences), Worse than expected (n=87 experiences), 22-30 August 2016

Source: Ipsos MORI

Base: Better than expected (n=282 experiences), In line with expectations (n=830 experiences), Worse than expected (n=1,566 experiences), 22-30 August 2016

personalised service are mentioned often by both happy and unhappy customers, as well as the level of information provision, accuracy and timeliness. Personalisation (or lack of it) really matters. This is an important emergent area, where digital experiences are driving expectations of wider services.

Recognising the notion of increasing expectations may be of particular relevance to the public sector. While fiscal austerity since 2010 has forced cuts in spending of up to 40%, depending on which services you look at, data from our survey for Deloitte's 'State of the State' report shows that overall satisfaction has either remained stable or improved, with 18% stating that public services exceeded their expectations in 2016, compared with just 5% back

in 1998. Considering that, in 2016, 40% said public services had got worse over the last five years [up from 33% in 1998], this suggests that public expectations of public services have actually fallen. The last few years of tighter spending and high profile messages on the lack of resources have provided a live experiment in 'expectations management' in the public sector – and it seems to have worked to an extent. But as the election showed, the public are now getting tired of austerity. The proportion who say cuts are necessary to pay off our debts has fallen from 59% in 2010 to 22% in 2017. Those who are willing to accept less from public services in order to reduce our national debt has fallen from 47% in 2010 to 20% now.

However, attempts to lower expectations in this manner are unlikely to be effective in the private sector, where there is so much choice between airlines, phone companies and so on. Marketers have long accepted that the expected level of service offered by one brand can be influenced by the experiences offered by its direct competitors – my experience in one clothing store will influence my expectations in other clothing stores. However, it appears that we are increasingly influenced by a much wider body of prior experiences across a variety of sectors. In a world where expectations are 'liquid', it is possible that the service provided by Amazon One-Click Ordering or Apple's Genius Bar affects the way consumers expect to deal with their bank, or utility provider.

Liquidity of expectations is important for two reasons. Firstly, this fluidity of expectations between sectors is likely why service expectations are rising. If expectations blur between sectors, then superior performance by a small number of standout organisations has the potential to raise customer expectations universally, and lead to falling satisfaction rates for the 'same' service elsewhere.

Secondly, it is no longer good enough to be 'best in class' – even leading providers in certain sectors might need to fundamentally restructure the way they offer services in order to survive.

Understanding how expectations are set and are changed remains one of the major challenges for anyone interested in improving user experience. ●

Great expectations – are service expectations really rising?

1998

5%
Exceeded
expectations

40%
Fall short of
expectations

2%
Don't
know

51%
About what
you expect

2%
No
expectations

Source: The People's Panel, Ipsos MORI and The Cabinet
Office (1998)
Base: 5,064 GB adults, June to September 1998

2016

18%
Exceeded
expectations
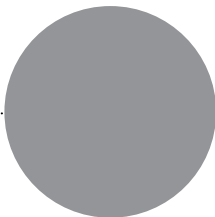
28%
Fall short of
expectations

51%
About what
you expect
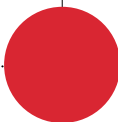
4%
No
expectations

Source: The State of the State 2016-17, Ipsos MORI and
Deloitte (2016)
Base: 1,099 GB adults 15+, July 2016

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Driving change
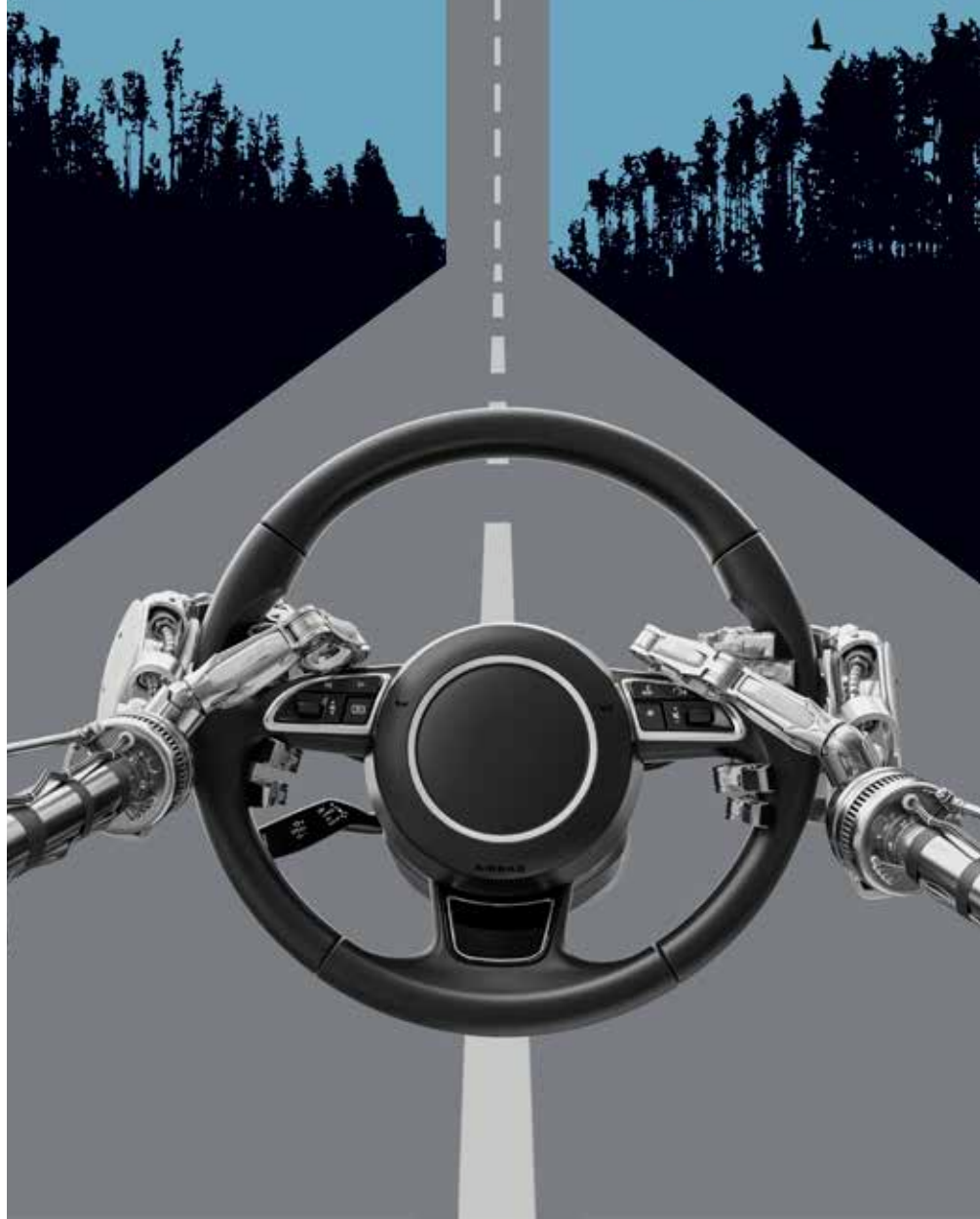
DRIVING CHANGE – ARE WE READY FOR DRIVERLESS CARS?

BY JAMES STANNARD
Research Manager,
Ipsos MORI Social Research Institute

In February, Elon Musk, 'the most interesting man in tech',[82] made the suggestion that in a decade most new cars would be built with full autonomy. To some, the idea is terrifying, conjuring up ideas of Stanley Kubrick's Hal let loose on our roads. For others, they would welcome a technology that promises greener, safer transport that reduces congestion, pollution and stress. Either way, such potentially disruptive technology matters to us all.

We are a nation of car lovers and our Intelligent Vehicles study for the RAC[83] confirms that cars remain central to the lives of the majority of Britons: almost three in five (58%) say that their current lifestyle means that they need a vehicle.

Britain aside, it's not hard to see why the automotive and technology world is excited about the prospect of autonomous vehicles. The latest data from the World Health Organisation (WHO) tells us that, globally, around 1.25 million people are killed in road accidents each year. Autonomous vehicles would remove the scope for human error and, in theory, could reduce or eliminate accidents completely.

Driving change

There are other good reasons too. Despite our love of cars, we actually don't use them very much. A 2012 report from the RAC Foundation[84] found the typical UK car is parked 96% of the time. Fully autonomous cars could reduce the need for parking spaces in urban areas and either move continuously through services like Uber, or promote ridesharing, reducing car-ownership in the process. Autonomous vehicles could also have the capability to drive to remote locations to park, reducing congestion and pollution, particularly in urban areas. And then there is the time we'd all save. In 2016, Americans spent the equivalent of more than ten days per year driving.[85] Fully autonomous vehicles would allow users to spend time working, reading, watching a film or talking to other passengers.

But despite these advantages and the predictions of the likes of Mr Musk, our Intelligent Vehicles report reveals public attitudes that could present barriers to the advancement and adoption of such groundbreaking technology.

The good news for the automotive industry is that the British public is positive about technology generally. Three in four Britons [76%] agree 'technology generally makes life better'.[86] In fact, when asked about connected driving technologies such as satellite navigation, traffic alerts and tyre pressure warnings, our study found that among those who drive and/or who are thinking about buying a vehicle in the next one to two years, more than three in four [78%] are interested in these technologies.

But when asked about driver assistance technology – systems that operate automatically, such as cruise control and automatic parking – favourable views seem to cool somewhat. Only three in five Britons [60%] say they are interested in having this kind of technology in their car. Then there is the future. It seems fully autonomous vehicles mark the point at which the weight of public opinion shifts: considerably more disagree [42%] than agree [24%] that fully self-driving cars [i.e. cars that can operate themselves without human input] are what we should be working towards. What is more, half of the British public [50%] say that they are concerned about future driver assistance technologies taking too much control away from the driver. However, nearly half of the

WE ARE STILL UNSURE ABOUT DRIVERLESS CARS

To what extent, if at all, do you agree or disagree with the following statements:

'I support the development of driver assistance technologies which reduce the role played by the driver if it means improving safety on the UK's roads'

47% Agree   17% Disagree
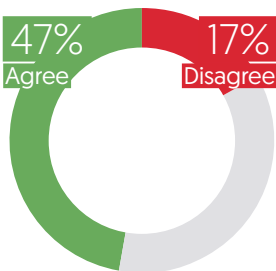
'I think fully self-driving cars are what we should be working towards'
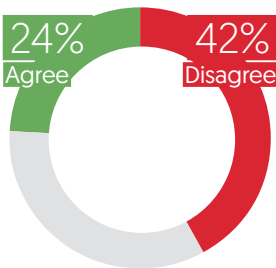
24% Agree   42% Disagree

British public (47%) support the development of driver assistance technology if it means improving safety on the UK's roads.

These views were echoed in our work on machine learning for the Royal Society. Driverless cars were seen as having benefits, by offering independence to those who are unable to drive, and by leading to more efficient travel through uniform driving. However, respondents voiced concerns about the ability of driverless cars to adapt to road conditions, to deal specifically with sudden changes as well as their vulnerability to hacking.[87]

FOR AUTONOMOUS VEHICLES, IT WOULD APPEAR THE PACE OF TECHNOLOGICAL CHANGE IS CURRENTLY OUTSTRIPPING PUBLIC WILLINGNESS TO ADAPT

Technological and legal barriers aside, public support for driverless technology presents the biggest challenge facing the likes of Google and Tesla. This is also a challenge for the research industry. As we deal with cutting-edge, alien environments and technology the world has never seen, we need to develop new methods to assess actual as opposed to theoretical reactions.

As well as measuring public support for driverless technology we can use innovative approaches, as we have with Highways England, to capture 'in-the-moment' driving experience and reaction to new technology. Traditional qualitative and quantitative methods can be complemented with techniques like heart-rate analysis, eye-tracking and galvanic skin response (GSR) to help clients understand how best to develop and market their products.

For autonomous vehicles, technological change is currently outstripping public willingness to adapt. This is an opportunity for carmakers, who should place public opinion on the same pedestal as the technological hurdles they're facing. This would allow them to build confidence and trust in the technology alongside its development. That said, when we do reach the driverless age, there's every chance a large number of people will still want to get behind the wheel, whether out of mistrust, the need for control, or just good old-fashioned car-loving Britishness. ●

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GLOBALLY, A MAJORITY (56%) THINK THAT EMPLOYERS SHOULD PRIORITISE HIRING NATIONALS OVER IMMIGRANTS WHEN JOBS ARE SCARCE [88]

THE FIVE TRIBES OF BRITAIN AND WHERE TO FIND THEM

BY ANNA SPERATI
Statistician, Ipsos MORI

Every month since 1974 the Ipsos MORI Issues Index has checked the concerns of the British. In 2017 a wider variety of issues were keeping Britain up at night. Over the past few years, those responding to our Issues Index poll have come back with an ever-longer list of contrasting concerns. In 2012 the average number of issues per person was 2.96, but this has risen to an average of 3.65 in 2017 (around the time of the General Election this year we hit a record high of 4.14).

This can be taken as a measure of the divides in British society – a fact reinforced by 2016's close EU referendum, and 2017's hung parliament. We are also finding that different types of people are reporting very different worries.

Using this new diversity of concern, we can use statistical analysis to group people by the issues closest to their hearts. In doing so, we have discovered that the British population divides into five 'tribes', each well defined by factors such as age, gender and location. Here we present our spotter's guide to each of the tribes, outlining the behaviours and social structures that mark them out.

YOUNG,
URBAN AND
UNENGAGED

The five tribes of Britain and where to find them

Members of this tribe – the largest in Britain – can be best found in urban environments, especially London. They can be identified by their relative youth (half are aged 18-34), and are most likely to have young children. They are also the most ethnically diverse grouping.

Their behaviour is typified by diffuse opinions on the biggest issues facing Britain, frequently flitting from one topic to the next. Concerns about the NHS, unemployment, immigration and housing jostle for primacy, with a low likelihood of any one issue holding sway for a significant time.

This pattern extends to party identification – although many are drawn to Labour, and Conservatives here are critically endangered, a similarly large proportion are politically disengaged.

The typical member of this tribe can be spotted around the country, often working in managerial positions or enjoying the opening years of his retirement. In addition to a heavy preponderance of males, this group also boasts a large number of over-55s.

His views are typified by a single-minded obsession with Brexit, although his opinion on it may differ as pro-Remain (ABC1s, Scots) and pro-Leave groups (over-55s, men) both feature strongly. By contrast, other concerns, such as the NHS, the economy, terrorism and immigration, struggle for survival.

This tribe are most often aligned with the Conservative party, while Labour supporters are more scarce on the ground.

The five tribes of Britain and where to find them

For a sighting of this tribe you will need to venture far from the metropolitan liberal elite; Yorkshire, for instance. The average tribe member will be older (half are aged 65 plus), and she (two thirds are female) will likely have left school without gaining any educational qualifications. This tribe is also the least ethnically diverse.

The NHS is a principal worry, however her traditional focus means that immigration remains a core issue, even though other tribes have moved on to fresh issues.

Politically, the tribe is split between Labour and the Conservatives, although the Tories hold an advantage. This group is also home to the last surviving colony of Ukippers.

WE HAVE DISCOVERED THAT THE BRITISH POPULATION DIVIDES INTO FIVE 'TRIBES', EACH WELL DEFINED BY FACTORS SUCH AS AGE, GENDER AND LOCATION

The five tribes of Britain and where to find them

120

TRIBE 4:
PUBLIC SERVICE WORRIERS
21% OF THE PUBLIC

This tribe is best viewed in its traditional habitat of leafy and suburban southern England. This is another grouping where women form a large majority, and many have children. Over half hold a degree, and this is reflected in their strongly middle class profile; 85% are from social grades ABC1.

Their concerns focus on the NHS, although Brexit and education also feature strongly. Brexit is their biggest single issue, although it may be its impact on public services that they find worrisome.

Labour are dominant in this group politically, although another rare breed is typically found here – the Liberal Democrat.

TRIBE 5:
THE HYPER-CONCERNED
4% OF THE PUBLIC

Britain's smallest tribe are also easier to spot away from the cities, in rural and suburban locales of the south of England. Like Public Service Worriers, they are a strongly middle class group, with three quarters in social grades ABC1; almost half have a degree.

The key to identifying this tribe is by their frenetic concern with almost everything. There is a greater than 70% chance that any given tribe member will mention all of their top three issues – the NHS, Brexit and education – and they are more likely than not to mention 12 of the 17 issues available.

Their heightened concern might also be related to their political activism – this tribe contains relatively few non-voters. Both Labour and Conservative benefit (roughly equally) from this, although Labour is dominant overall.

The five tribes of Britain and where to find them

But what does this mean?

Firstly, while Brexit may be earning the most headlines, there are plenty of other things that worry us about Britain. Secondly, even for those who consider our separation from the EU as the most important issue facing our country today, Brexit does not simply mean Brexit. It is a multi-faceted concern, representing different things to different people at different times. All of this adds to up to challenging times for a divided nation of worriers.

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THE MAJORITY OF BRITONS (52%) BELIEVE THAT THE COUNTRY'S ECONOMY WILL GET WORSE IN 2018 [89]

Our screen obsession

OUR SCREEN OBSESSION

BY CAROLINE WALKER
Head of Clients, Ipsos MORI

When I was a child, my parents used to say I would get 'square eyes' if I watched too much TV. Today, one of my major battles with my own children is the amount of time they spend on their phones. In part this is a perennial parental worry about how their kids spend their time, but that isn't the whole story. We are all increasingly spending more time looking at screens. We are a nation obsessed.

Our latest IPA TouchPoints study shows that UK adults are now spending almost eight hours a day consuming media, which is up 9% from 2016. Media consumption had grown only 13% in the previous 12 years, so there is now a real acceleration in our use of smartphones and other platforms.[90]

Most of us say we are constantly looking at screens [75%],[91] and there has been a steady increase over recent years in the number of us checking in with work while we are on holiday.[92] In part, just because we can, but also because we fear missing something important or just missing out.

68% OF PEOPLE IN BRITAIN AGREE THAT THEY SPEND TOO MUCH TIME LOOKING AT THEIR PHONES

We aren't happy about our obsession. Some 68% of people in Britain agree they spend too much time looking at screens. This rises to a staggering 79% amongst the 18-24 age group – the so-called digital natives.[93] Few of us can resist the lure of those alert icons, and it's not uncommon to lose an hour or more to mindless browsing of social media.

But are we now waking up to our addiction? Earlier this year ebook sales fell for the first time, whilst sales of physical printed books grew by 7%. Somewhat surprisingly, this shift has been driven by younger readers buying 'blockbuster' titles like 'The Girl on the Train' by Paula Hawkins in droves[94] – a copy of which was spotted on the bedside table of my teenage daughter, albeit next to her phone.

We have come to believe that we need the internet to function – 78% can't imagine a life without the internet[95] – but there is a real opportunity with new technology that utilises other senses, not just our eyes, to move us beyond our constant screen time. Increasingly, we want the benefits of the internet, but really don't want to be glued to our screen the whole time.

I believe we are passing an important milestone in the life cycle of our smartphone relationship. We are even seeing some of the leading lights of the digital technology world such as Justin Rosenstein, who helped develop the Facebook 'Like' button, actively trying to reduce their own screen time by using parental controls on their own devices. He is reclaiming some quality time, to reduce distraction, increase his focus and boost his productivity.[96]

Voice operated access to the internet is also fast becoming more mainstream, with huge growth in the Amazon Echo and Google Home devices. With an estimated 18 million Echos sold globally,[97] conversations with Alexa around the dinner table will become

more commonplace, replacing the need to look at our phones to settle an argument.

The latest, non-screen based technology will give us different ways to access the internet beyond the smartphone that could really help us get over our obsession with screens. However, there is a worry that we are just displacing our addiction; that smartphones are not the problem at all – they are just the method we use to get our 'hit', to satisfy our need to be constantly connected, engaged and amused. Alexa and Google Home may just be the methadone to the heroin of the smartphone.

Personally, I feel optimistic we will be spending less time looking at screens in future which will be good for our creativity, our health and our relationships. And it just might reduce the number of arguments I have with my children. ●

Stop being so rubbish with rubbish!

STOP BEING SO RUBBISH WITH RUBBISH!

BY ELLIE BROOKE

Marketing and Communications Executive, Ipsos Marketing

The average British family is throwing away £700 worth of food each year, with 15 million tonnes of food waste ending up in our landfills annually. It's a shocking statistic that has economic, social and environmental implications.

But even discussing the environmental consequences of food waste is proving difficult. Our 2017 Global Trends Survey[98] found that almost a third of Britons are tired of the fuss being made about the environment. Even more worryingly, two fifths of the population think scientists don't know what they are talking about when discussing environmental issues, despite being experts on the subject matter.

Earlier this year, Britons' penchant for perfect fruit and veg came under scrutiny from MPs and the Department for Environment, Food and Rural Affairs Committee [DEFRA], as up to 40% of all vegetables grown in the UK are thrown away because they don't meet our exacting standards.[99] While the European Commission's regulations on bendy cucumbers are often held up as bureaucracy gone mad, we cannot lay all the blame for food waste at the feet of the EU.

Stop being so rubbish with rubbish!

Retailers have a part to play too. Varieties are chosen for their durability and appearance, and consistent sizes and shapes make packaging more efficient.

Consumers are not innocent either. There is a clear disconnect between what people say and what they do. People shop with their eyes. Of course, we say bruising and blemishes don't matter, but we all walk into the supermarket and buy the shiniest, pinkest looking apple. Unless there is a tangible benefit, why would we buy into imperfection? Consumers also expect variety in their diets, raising demand for non-seasonal, non-native food products. This is another factor of food waste, as these foods typically sit longer in the supply chain, causing higher spoilage rates.

There is a huge opportunity for start-up companies and large retailers alike to address the issue of food waste, and contribute to a change in behaviour for both consumers and retailers. Supermarkets have already begun selling 'misshapen' fruit and vegetables for a lower cost price – they are seen to be environmentally friendly, without affecting the attractive packaging, supermarket layout and promotional displays which contribute to the beautification of food.

Importantly, this also taps into a greater consumer trend. Our Global Trends Survey shows that half of the UK population are more likely to buy products that are locally grown than those

WE'RE INTERESTED IN PACKAGING THAT HELPS US HELP THE ENVIRONMENT

I am willing to pay more for

Packaging that helps food stay fresh longer

53%

55%

Packaging that is made of biodegradable material that is good for the environment

42%

39%

Products that use ingredients that don't harm the environment

63%

45%

Global average
GB

that are grown elsewhere.[100] By moving away from the perfectly shaped, perfectly coloured, and suspiciously fresh strawberries available in the middle of winter, consumers feel that the produce is more 'real' and therefore more 'local'. Brexit's impact on the cost of food may help too.

Technology also has the potential to contribute to the reduction of food waste. Globally, over half of us agree that we would pay more for a product if the packaging helped the food stay fresh for longer [52%].[101] Sainsbury's have recently launched a new food label which changes colour from yellow to purple, reflecting how long the packet has been open. It is temperature and time-sensitive, letting the consumer know that the food is still edible, even if it is past its use by date. Smaller start-up companies are also making an appearance on the market. German app FoodLoop[102] sends push notifications on behalf of supermarket chains, telling its subscribers what products have been reduced as their sell by dates approach. In Britain, the Olio app[103] lets you tell your neighbourhood that you have surplus food and encourages sharing, which reduces waste.

Stop being so rubbish with rubbish!

Companies do not pay enough attention to the environment – agree

16-24
88%

25-34
78%

35-44
75%

45-59
77%

60-64
81%

Source
Ipsos Global Trends

Base
18,180 adults across 23 countries (1,002 GB), online, 12 Sep – 11 Oct 2016

The young are ready to do more. They are more concerned about the environment than older generations – 16-24 year olds are significantly more likely to agree that companies do not pay enough attention to the environment (88%) vs. those aged 35-44 (75%). They are also more likely to agree that climate change is a result of human activity.[104] The level of concern for the environment amongst young people demonstrates the potential value these new, usable and quirky apps may have both in terms of profit for business, and progress towards a more environmentally sustainable food chain.

Food waste is not glamorous, but it is an increasingly important part of our lives as consumers and citizens. Those organisations that can develop waste solutions that seamlessly work with our lives and habits will see the benefit – not just in their bottom line, but also in the wider world. ●

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20% OF WOMEN AGED 30 TO 80 IN THE UK SAY THEY ALWAYS SEEM TO BE ON A DIET 105
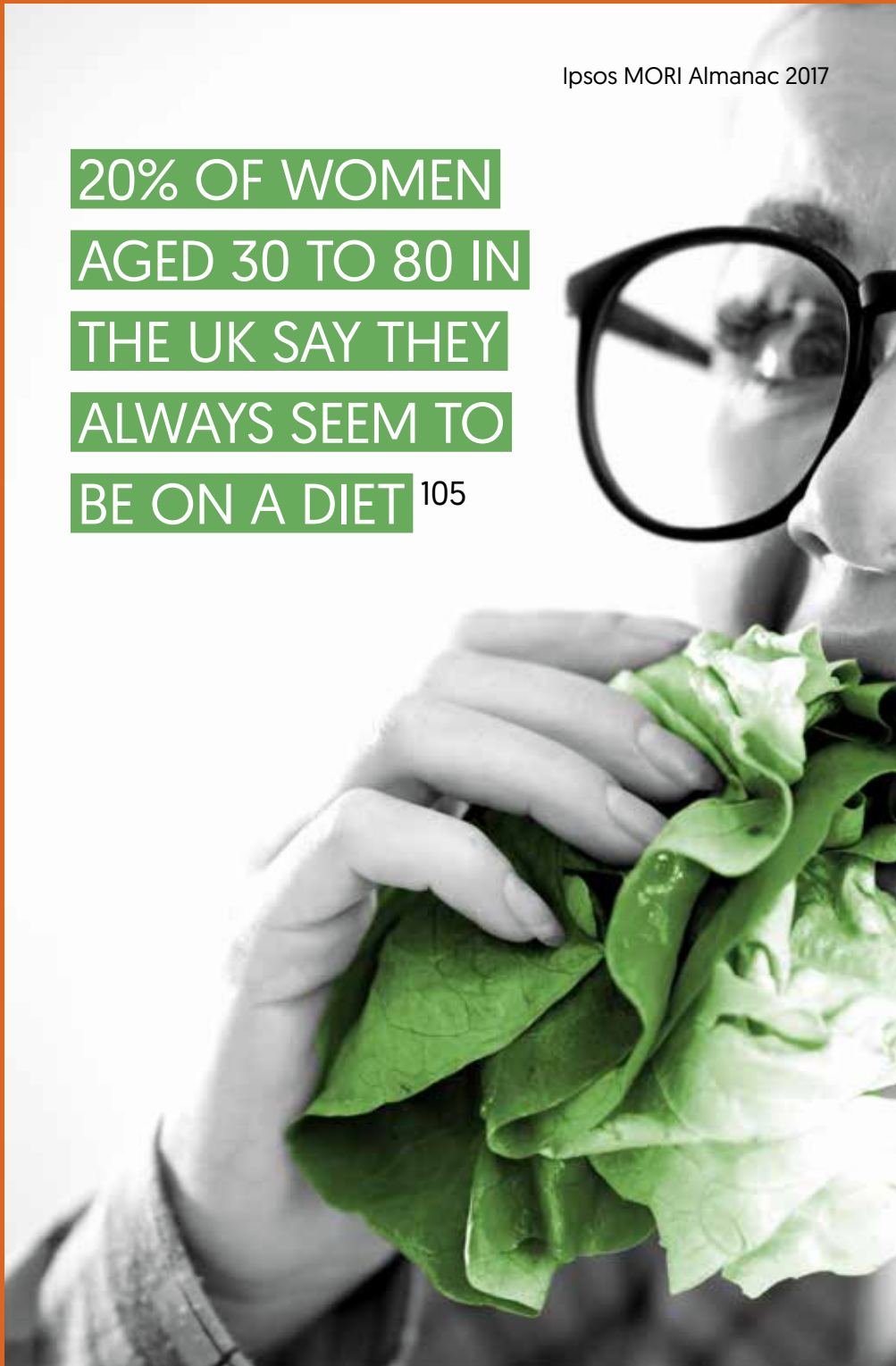
Open banking: are you ready?

27%
OF PEOPLE WOULD FIND
AN ALL-IN-ONE FINANCIAL
APP APPEALING

OPEN BANKING: ARE YOU READY?

BY GEORGIANA BROWN
Director – Financial Services, Ipsos Loyalty

Last year we anticipated the impending battle between banks, payment providers and fintechs to develop services utilising open APIs. As the January 2018 open banking deadline looms we ask, are you ready?

EU regulation means that, with our consent, providers can now share our banking information with third parties. It is part of a move by regulators to foster greater competition in the financial services industry, transfer power from providers to consumers and encourage us to take greater personal financial responsibility. But while 57% of people see new potential services as unique, only 36% would be motivated to sign up. Most consumers feel the tested use cases offer something new and different; but it will require clear communication of the benefits and mitigation of perceived data security risks before most will adopt them. There are some big barriers to overcome.

We tend to see this sort of data with ideas whose 'time has not yet come'. As with mobile payments, we may well see open

Open banking: are you ready?
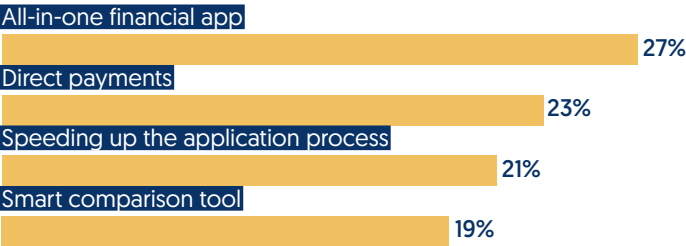
% very/extremely appealing

All-in-one financial app

27%

Direct payments

23%

Speeding up the application process

21%

Smart comparison tool

19%

banking adoption that is slow to start with but accelerates as the benefits become clearer. Some use cases show more appeal than others though.

An all-in-one app, where you see your personal finances from different providers in one place, shows the most potential, with 27% rating it as very/extremely appealing. This is more appealing than a smart comparison tool that uses personal data to make tailored recommendations. This difference hints at providers needing to demonstrate the advantages while recognising our need for control. While an all-in-one app would show me my own money and spending, empowering me to manage it, a smart comparison tool tells me that computer software is better able to make product selections than I am – which is potentially alienating.

Attitudes do vary, and our study shows wide market differences. Emerging markets such as China and Brazil, plus Saudi Arabia and UAE, show most enthusiasm to adopting open banking, while more established European markets and Japan show most reticence. With EU regulation meaning Europe is leading the way in service provision, this is an interesting dichotomy. It could send a message to developers that they should be looking to launch products in the Middle East, Asia and South America at the same time as Europe, as these digitally-open growth markets show ripe opportunities for early adoption.

Early adopters will be crucial in helping provide reassurance so that others will follow. Our segmentation indicates that Millennial-heavy Active Adopters will lead, and could assist brands in spreading the word on social media.

As open banking draws closer, providers are scrambling for position. Established banks remain most trusted to provide these services and should see open banking as an opportunity, not a threat. Providers should keep consumers firmly in mind during development and launch. There is uncertainty and scepticism, and success will only come if providers demonstrate tangible consumer benefits, proactively reassure about data security concerns, and target and use early adopters to build trust and encourage wider adoption.

The eyes of the industry, regulators, governments and commentators are on those launching open banking services. The success of open banking will determine the spread of open APIs to pensions, investments and beyond – which could bring huge benefits from greater consumer visibility and better management of our financial futures. The stakes are high. ●

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Beyond System 1
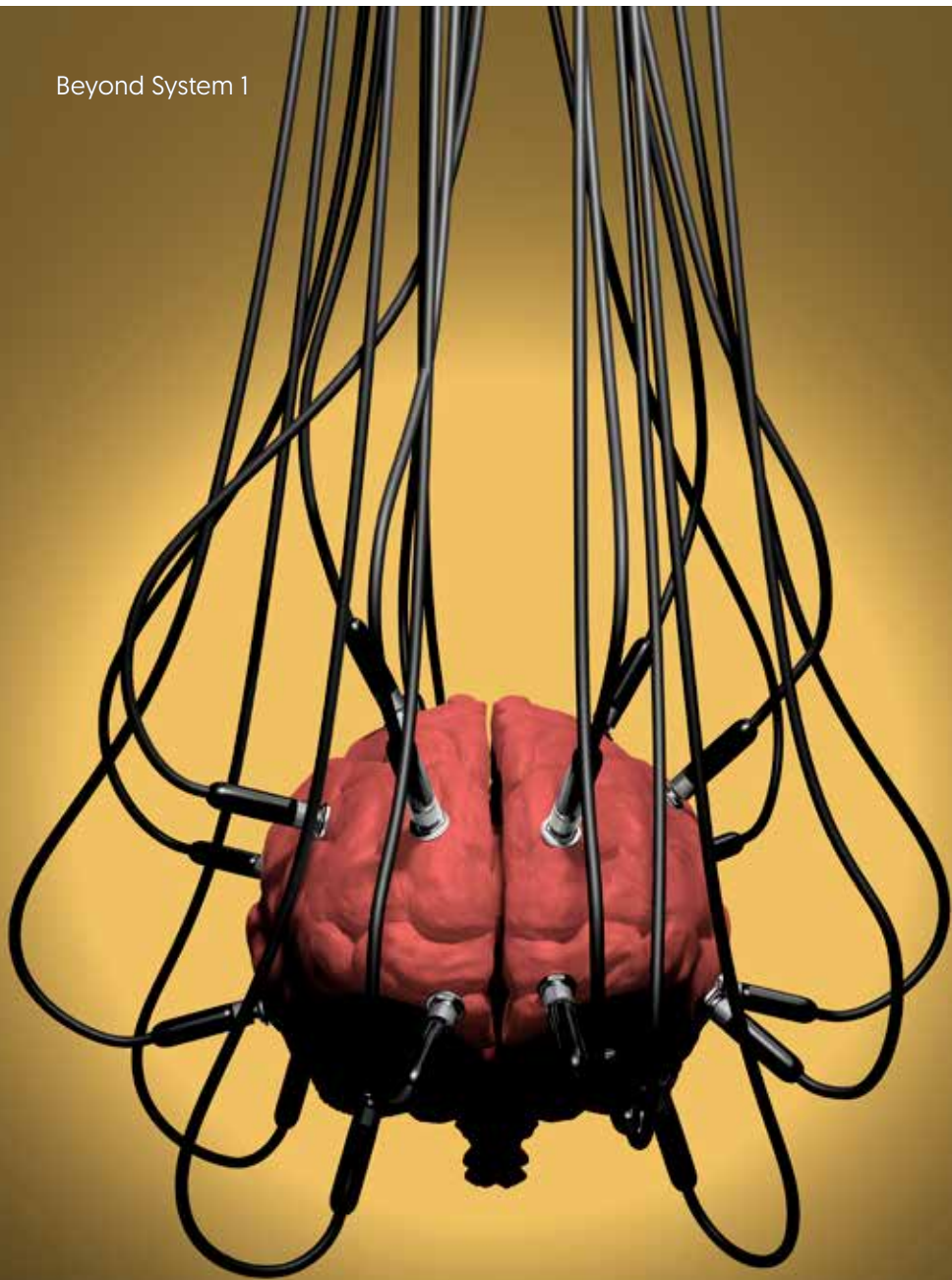
BEYOND
SYSTEM 1

BY COLIN STRONG
Head of Behavioural Science, Ipsos

2017 was the year that behavioural science achieved global recognition with Richard Thaler winning the Nobel Prize in Economics for his use of psychology to understand consumer behaviour. He has argued that many of our decisions are made using 'System 1 processing' where we use unconscious rules of thumb to navigate our way through the huge variety of daily decisions we need to make. The work of Thaler and others has had a huge impact on brands and governments who now use these insights to apply 'nudges' to help drive certain (hopefully more positive) outcomes for consumers. But this begs a significant question. This is a discipline that has been around for decades. Why has it risen to such prominence now?

The answer to this is inextricably linked to a changing consumer environment in which we are seeing massive technological disruption. Indeed, 2017 was also arguably the year when many technologies moved from heady promises through to intense activity by brands, and increasing consumer take-up or acceptance.

Beyond System 1

Examples of these include:

- **Autonomous cars:** Many car manufacturers are now actively pursuing strategies in this space, including Ford who have announced their intention to build a vehicle at scale that not only is capable of autonomy, but that can also serve in both taxi and delivery businesses.

- **Internet of things:** We have seen a wide range of technologies not only launch [from digital condoms to smart hairbrushes] but also get adopted at scale. A good example of this is Disney World's Magicband to access amenities in the theme park. The Magicband tracks the actions of guests, helping Disney to optimise their services based on demand.

- **Voice-based services**: There has been a shift in the way consumers are increasingly using, or happy to use, voice-operated devices, with millions of consumers now regularly using a voice-activated device. Google Home and Amazon's Alexa have had huge success in this market.

Widespread adoption of these new technologies represents major opportunities and threats to brands as they irrevocably change many established consumer behaviours. But what is less understood is the way that these new technologies also change something much more fundamental. They also change the way we think.

It has always been the case that the tools we use influence the way we see the world. So, for example, the printing press was responsible for moving from an oral tradition to one where we consumed knowledge independently – ushering in the Enlightenment and the cult of the individual. The telescope helped challenge the notion that our lives are dictated by God and heralded an era where we consider that our lives are determined by the laws of nature.

The challenge we have in this era of intense change is to understand how digital technology is shaping present-day mindsets. This is not to claim that there are changes in the structure of our minds or cognitive capabilities. But there are inevitably subtle changes in the way we think about brands and how we relate to them.

WIDESPREAD ADOPTION OF THESE NEW TECHNOLOGIES REPRESENTS MAJOR OPPORTUNITIES AND THREATS TO BRANDS AS THEY IRREVOCABLY CHANGE MANY ESTABLISHED CONSUMER BEHAVIOURS

Of course, as these changes gradually take place, brands need to understand them to adapt their strategies. We believe there are a wide variety of ways in which our experience of technology is reshaping our expectations – leading to the need for new forms of consumer understanding and measurement. These include:

- **Personalisation:** We are increasingly experiencing products and services that are designed to meet our own specific needs (such as personalised beauty boxes like Glossy Box or online clothes stylist services like Thread). As such, we need to measure psychological profiles of consumers to ensure that brand messages resonate – e.g. for extroverts, brands will need to ensure that their messaging dials up how rewarding social experiences associated with their products or services will be.

- **Optimisation:** Technology (ranging from fitness devices to toothbrushes) increasingly offers consumers the opportunity for self-improvement and enhancement experiences. Brands will therefore need a detailed understanding of the psychology of behaviour change if they are to meet consumers' optimisation expectations. By using this, brands will be able to help ensure that their services will provide positive outcomes (e.g. getting fit, brushing teeth well, eating healthily).

Beyond System 1

- **Experiences:** We are moving to a situation where consumers are often less concerned about ownership of products and more focused on experiences (such as Airbnb and Uber). The psychology of experience design therefore comes to the fore to create 'stickiness' and engagement. So, for example, brands can use this to develop experiential marketing best practice to create much greater stickiness with traditionally 'dull' categories such as insurance and savings accounts.

- **Enhancing moments:** The rise of delivery services (such as UberEATS and Deliveroo) means that consumers are expecting brands to help them to maximise their passing moments. This means that to engage effectively, brands will need to be able to interpret data to identify moods, emotions and personal relating styles if they are to gauge their response correctly. Brands can use this information to develop much more time and content sensitive offers that are more likely to result in sales.

So, there is an intimate relationship between the increasing digitisation of our lives and the means we use to understand and measure our behaviour. Richard Thaler's Nobel Prize reflects this change – but it is the tip of the iceberg. As our examples demonstrate, the breadth and depth of change we are seeing means we need to go beyond System 1 and draw on a much wider repertoire of understanding from behavioural science if we are to properly help brands to respond effectively to the digital economy. ●

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ONLY 3% OF BRITONS HAVE EVER DRIVEN AN ELECTRIC VEHICLE, WHILE 7% HAVE BEEN A PASSENGER IN ONE 107
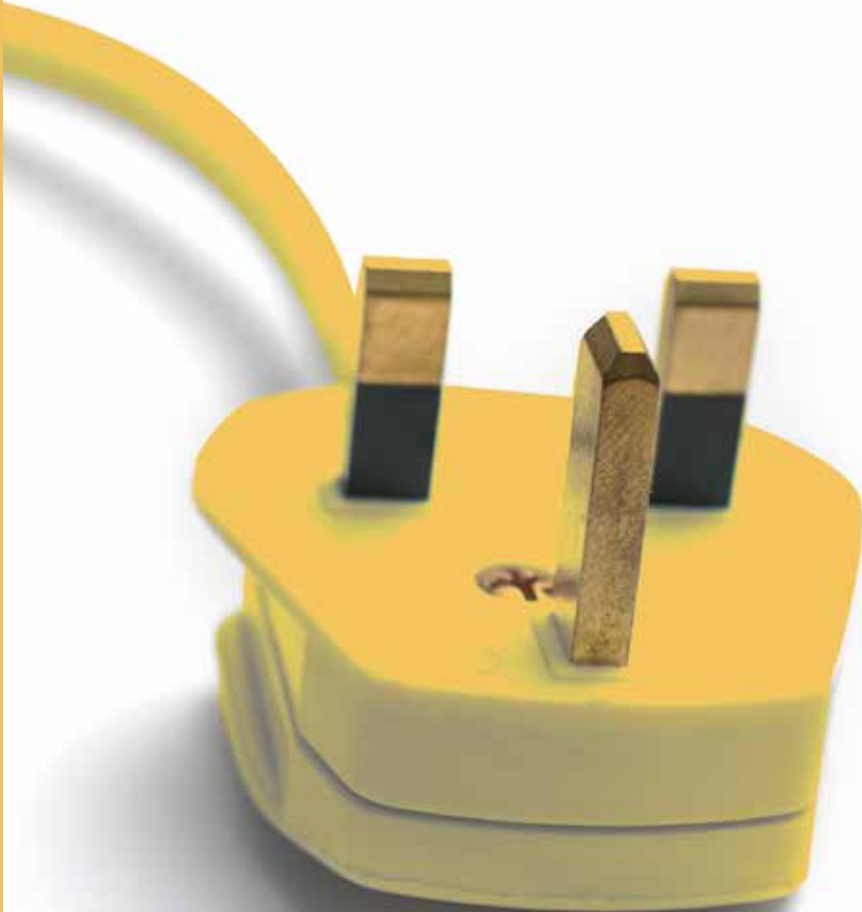
Immigration – changing and unchanged

IMMIGRATION – CHANGING AND UNCHANGED

BY KULLY KAUR-BALLAGAN
Director,
Ipsos MORI Social Research Institute

Immigration – changing and unchanged

For the last two decades, immigration has been a key issue facing Britain. It is an issue that sharply divides the public – and these fractures were revealed by the 2016 referendum on EU membership where one of the biggest drivers of the 'Leave' vote was anti-immigration/nativist sentiment. It cuts across party political lines – unifying both Labour and Conservative 'Leave' voters. But now things may be changing.

The Ipsos MORI Issues Index shows that concern about immigration has been falling since 2015.[108] Our unique longitudinal study, Shifting Ground, shows that people have actually become more positive about the impact of immigration on Britain.[109]

This, in part, may be because some have become reassured that the Brexit vote will reduce immigration, and others who were more optimistic about immigration, may have been galvanised to express a more positive view.

While concern about immigration has receded, concern about Britain's relationship with the EU has increased – and we know these

ATTITUDES TO IMMIGRATION HAVE SHIFTED SIGNIFICANTLY
On a scale of 0 to 10, has migration had a positive or negative impact on Britain? [0 is 'very negative', 10 is 'very positive']

2015 GENERAL ELECTION

EU REFERENDUM

Positive

Negative

FEB 2015

2015 REFUGEE CRISIS

OCT 2016
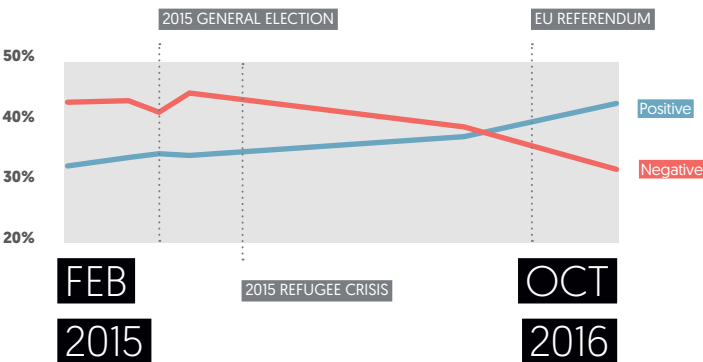
Source
Ipsos MORI Shifting Ground

Base
1,301 GB adults 16+ completing an online panel survey between February 2015 and October 2016

two issues are inextricably linked, with many concerned about Brexit focused on its impact on immigration. Indeed, our study shows that around two-thirds of the public still want immigration levels to be reduced. This general opposition to the number of immigrants has barely shifted since the 1960s, even when net migration levels were much lower than they are today. Our Shifting Ground study shows that six in ten (62%) wanted immigration reduced in February 2015 and this figure stood at 60% in October 2016, suggesting that Brexit had little impact in changing views.

Political parties have struggled to grapple with the issue of immigration and allay the public's concerns. One of the key pledges of the Conservative party in the 2017 General Election was to cut immigration to the "tens of thousands" – a promise made repeatedly since 2010.[110] The public is deeply sceptical given this promise has never been kept. Two in three (68%) think it is unlikely that the target will be met over the next few years.[111] Yet promising to reduce numbers is unlikely to alleviate the public's concerns.

EXPLAINING NATIVIST/ANTI-IMMIGRATION VIEWS
Factors associated with anti-immigration sentiment

ANTI-IMMIGRATION SENTIMENT

Does not value diversity
17%

Opposed to political correctness/suspicious of human rights
12%

Nostalgic for Britain's past
11%

Will be in stronger position to negotiate trade post-Brexit
9%

Strong sense of authoritarianism
9%

Does not trust experts
5%

Belief that the system does not work for them personally
5%

Strong belief individuals should look after themselves
3%
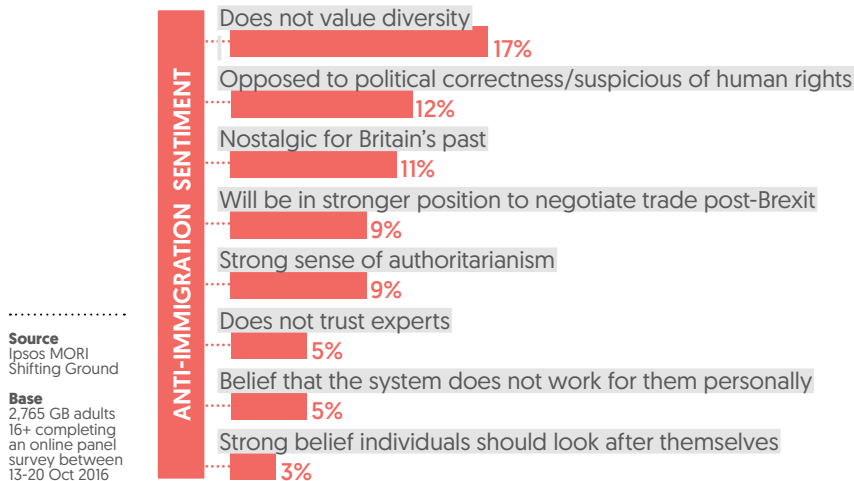
GENERAL OPPOSITION TO IMMIGRATION HAS BARELY SHIFTED SINCE THE 1960s
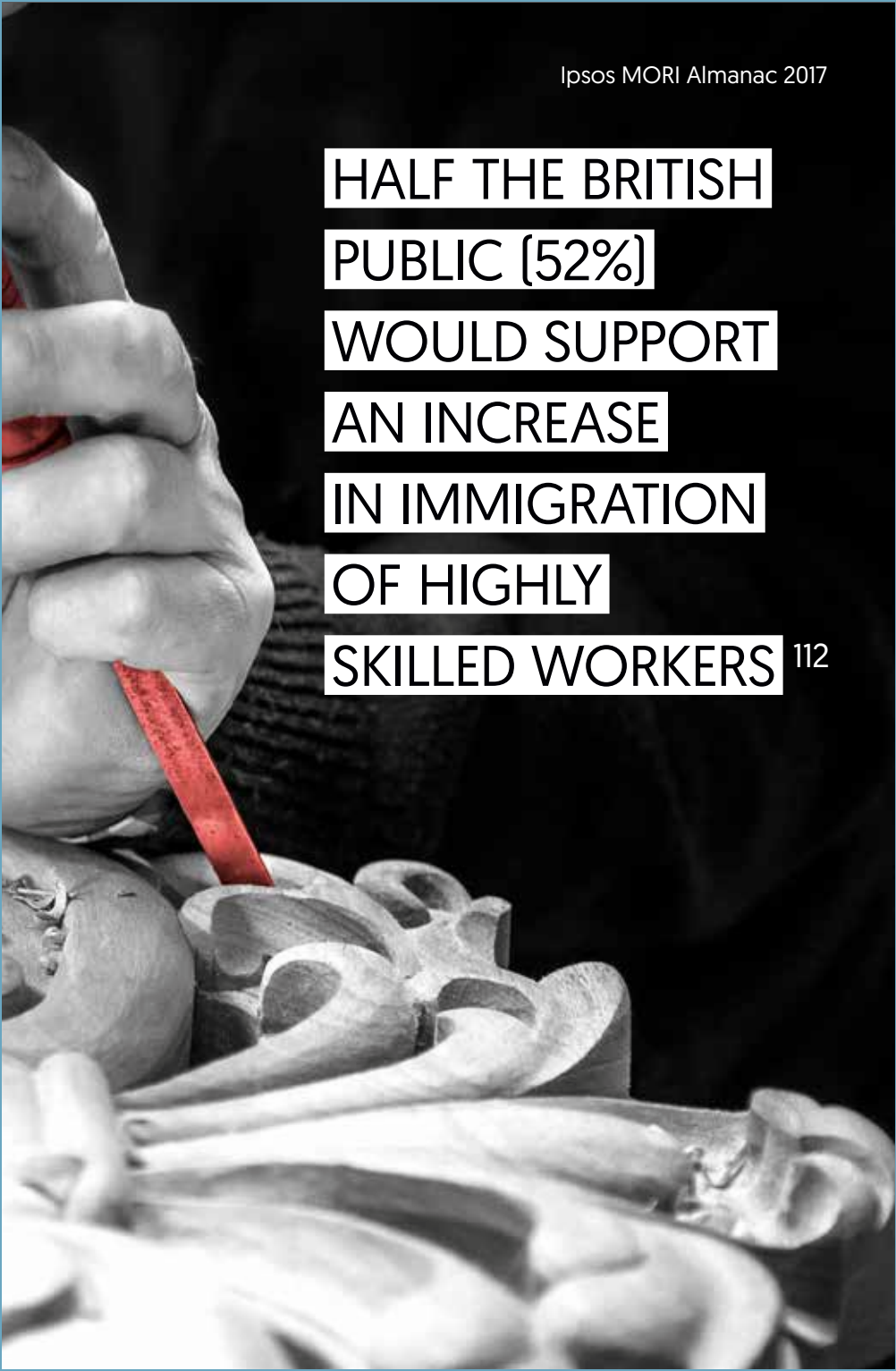
Our analysis shows there are wider cultural concerns and values that inform people's views on immigration that will be hard to address – it is as much about values and identity as numbers.

Factors such as not valuing diversity, opposition to perceived political correctness, and a sense of nostalgia for the past are most strongly associated with anti-immigration sentiment – more so than any economic worries or concerns about burdens on public services.

Arguments about immigration are part of a set of shared cultural values. How can policymakers address people's concerns unless they understand the motivations behind these sentiments? But trickier still, should policies address or shift these cultural values and concerns?

It will be difficult to unite a population so varied in their views and on an issue where opinions are largely unchanging. ●

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HALF THE BRITISH PUBLIC (52%) WOULD SUPPORT AN INCREASE IN IMMIGRATION OF HIGHLY SKILLED WORKERS [112]

Is pessimism holding back progress on poverty?

IS PESSIMISM HOLDING BACK PROGRESS ON POVERTY?

BY JONATHAN GLENNIE
Head of Sustainable Development Research,
Ipsos MORI Social Research Institute

Quality of life around the world is improving. That is what the evidence suggests – not in every country, not in every way – but on average, and in general. Income poverty and child and maternal mortality rates are all down, while crucial indicators of development such as the use of condoms within marriage, vaccination of babies, schooling for girls, and access to financial services have seen important leaps forward.

So overall, despite huge challenges faced in many countries and especially for disadvantaged communities, there is a good news story to tell about the last few decades of development effort.

Yet, as Bobby Duffy discusses elsewhere in this issue, many people around the world think things are getting worse. In September 2017, as the UN General Assembly gathered in New York to discuss (among other things) progress towards the Sustainable Development Goals, Ipsos partnered with the Bill & Melinda Gates Foundation to examine public awareness and perceptions of global progress on these key development issues.

Is pessimism holding back progress on poverty?

The results are eye-opening. The public are far more pessimistic about development than they should be. Only two out of every ten people realise that poverty is reducing around the globe while, by contrast, 52% think it has increased (28% didn't know). While two thirds of the world's married women use condoms, most people hugely underestimate this number. And although 85% of one-year-olds have been vaccinated against at least one disease, again, most people think the number is far lower, just as they do when it comes to gender equality in schools and access to financial services.

We asked people eight questions about the progress of development. The average person can only answer two questions correctly.

Are we then a world of ignorants? Not quite. It turns out that people in emerging economies are much more likely to recognise the progress that is underway. The Chinese are by far the most accurate analysts of global poverty, with half (49%) of respondents saying that it has decreased in the last 20 years. Kenyans, Peruvians, Senegalese, Indians and Indonesians don't do badly either, with over 30% of these respondents answering correctly. Compare that to Italy, France and Japan where only 9% correctly stated that global poverty is decreasing, compared with up to 68% (in the case of France) saying that it was on the rise. Partly this reflects relative local feelings about their own country.

Most people in rich countries have no idea that married women in developing countries are now likely to use contraception, but people in poor countries do know, and the huge surge in vaccinations of recent years is recognised by poor countries, but not by inhabitants of rich ones.

While respondents in all countries do somewhat better in their answer on child and maternal mortality, the same picture is apparent – poorer countries are more likely to understand that progress is underway.

Speculating on the reasons for this, the most obvious explanation is that people in poor countries can see this progress with their own eyes, comparing life in their households and communities 20 years ago with life as they find it today. Whereas people in rich countries

PEOPLE IN EMERGING ECONOMIES ARE MORE LIKELY TO RECOGNISE PROGRESS IS UNDERWAY

% who believe that the proportion of the world's population living in extreme poverty has increased

Country	%
South Africa	68%
France	68%
Hungary	68%
Argentina	67%
Mexico	67%
Russia	65%
Nigeria	64%
Turkey	64%
Germany	63%
Italy	60%
Belgium	58%
Spain	56%
Saudi Arabia	56%
Kenya	55%
Total	52%
US	51%
Senegal	51%
Brazil	51%
Canada	48%
Indonesia	44%
Australia	43%
GB	43%
India	41%
Poland	39%
Sweden	39%
South Korea	38%
Peru	36%
Japan	32%
China	21%
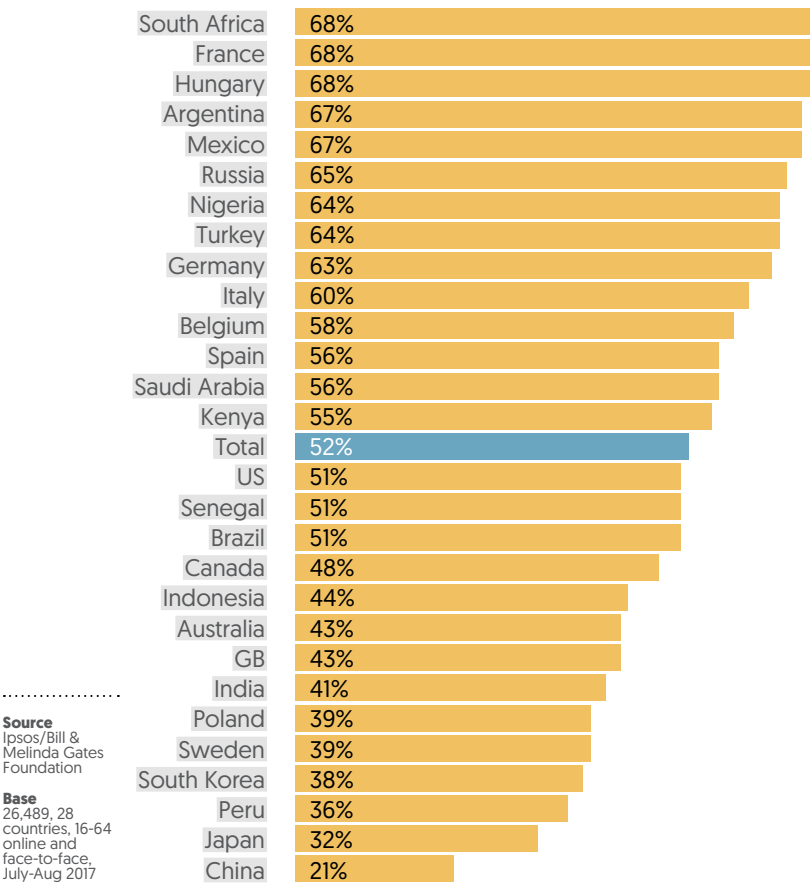
remain largely unaware of progress – they don't generally have time to study the data, and news stories tend to focus on local problems, negative stories and disasters in developing countries, rather than good news.

Is pessimism holding back progress on poverty?

This is a problem. It is a common refrain in aid donor countries that aid isn't working, but how much more support would there be for aid spending and development efforts more broadly if the true picture of progress were shared with donor publics?

This matters because optimism and understanding the progress the world has made are statistically associated. Among the group that do have a better understanding of development progress [about 1 in 8 people], optimism for the future is significantly higher. The best informed have a consistently more hopeful outlook across both their own future and the world's.

The question is: which way is the causality flowing? Does more knowledge about global progress make you more optimistic about the future, or does a generally optimistic outlook make you more likely to think the world is improving? In my view, probably both.

Those in the Global South who see their lives improving are likely to be optimistic about the world overall. Those of us living in traditionally wealthy countries, who are now facing economic slowdown, may well allow our general pessimism to inform our view that the whole world is heading in the wrong direction. We shouldn't. ●

HALF OF UK ADULTS WOULD SUPPORT UNIVERSAL BASIC INCOME IN PRINCIPLE ...

BUT SUPPORT DROPS IF IT MEANS BENEFITS ARE CUT OR TAXES RISE 113

Cheers to a drinks upheaval

CHEERS TO A DRINKS UPHEAVAL
THE GLASS IS HALF FULL, BUT OF WHAT?

BY GARETH PUGH
Senior Director, Ipsos Marketing

Britain is going off booze. And societal and legislative changes are tipping the drinks industry on its (frothy) head.

Alcohol consumption has declined by 18% in the UK in the past decade.[114] This is part of a wider trend, with consumption of alcohol in developed markets in a 30-year decline. According to Diageo, we're drinking better, not more, as premium spirits sales are increasing while beer sales fall.[115] In Britain we're not particularly happy with our boozy reputation – 'drinking too much' is top of our list of worst characteristics (42%).[116] Our recent report on Millennials[117] identified a clear generational pattern in our drinking – each generation is drinking less than the previous one (just 6% of Millennials drink alcohol five or more days a week). The number of teenagers consuming alcohol (illegally) in pubs or bars is at an all-time low.[118] Part of this generational decline may be explained by the growing population of British Muslims, which has doubled in just over a decade, now numbering three million.[119]

While all this has some far-ranging consequences for alcohol brands, these trends are also big news for the soft drinks industry,

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who are facing their own challenges. April 2018 will see the arrival of the Sugar Levy, which could see some soft drinks increase in price by 24p per litre.[120] This cocktail of threats and opportunities is serving up some change in the soft drinks industry.

While key brand owners are re-formulating old favourites to reduce the impact the levy will have on them or their consumers, there is also an opportunity for innovation. Manufacturers are instead looking to drinks that are naturally less sweet, but still tasty, thanks to more interesting and unconventional ingredients. For example, Cawston Press, with their rhubarb and elderflower fizzy drinks, have seen their sales value increase from circa £6M p.a. in 2013 to over £10M this year.[121] Although still in their infancy, so-called non-alcoholic spirits like Seedlip offer complex, aromatic taste experiences with super-premium botanical products, some infused with bark, others with green pea. The upscaling of the mixer in your glass continues. Fever-Tree has cemented its growth success story with a smart redesign of its broad tonic range this year.

The development of non-alcoholic drinks draws parallels with other areas of the food and drink industry as a whole. The revolution of vegetarian cuisine in this country is an excellent example. In the years of Major, the choice was minor. A restaurant may offer a veggie lasagne, as a 'less than' version of a main menu item; freshly microwaved but fresh out of ideas. Nowadays, the vegetarian options on menus are often the most interesting and imaginative dishes, even to meat-eaters. Just as restaurants focus less on the lack of meat and more on the presence of enjoyable tastes and ingredients in their own right, so do the innovators in soft drinks, and in particular in the on-trade. Non-alcoholic choices are positively intriguing and rewarding on their own merits, and not a consolation prize for those not on the booze.

This all amounts to new challenges and new roles for soft and hard drink manufacturers. With the arrival of some soft drinks that are as complex and connoisseur-ish as whiskeys, in an era where the tonic in your glass is now as much a feature as the gin, blurring is occurring. Could we see new competition between spirit brands and non-alcoholic botanical distillations for our taste-buds and our spend? Or could there be new link-ups and partnership opportunities, where instead of a watery Bacardi-and-Coke we

JUST AS RESTAURANTS FOCUS LESS ON THE LACK OF MEAT AND MORE ON THE PRESENCE OF ENJOYABLE TASTES AND INGREDIENTS IN THEIR OWN RIGHT, SO DO THE INNOVATORS IN SOFT DRINKS

might choose a chokeberry gin and mint and bark tonic? For brand-owners, this will mean re-evaluating exactly which category they are in and what their portfolio should embrace. Diageo have a significant stake in Seedlip, having invested capital and also hours of marketing mentoring and idea sharing via Distill Ventures, with a business model that is, in itself, unconventional.[122]

Whatever new battle-lines and alliances emerge, there are perils to navigate and prizes to be won for savvy soft drink producers. One winner for sure will be the designated driver. With many more rewarding, interesting drinks to enjoy on a night out, instead of settling for a flat shower-head cola on the fringes, their choices can help stimulate conversation, and see them bringing the party, not just bringing their mates. Mine's a 0% gin and tectonic shift. ●

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GENERAL ELECTION 2017 – DIARY OF AN EXIT POLL

BY CHRISTOPHER HANLEY
Special Projects Manager, Ipsos MORI

While polling has its challenges, one poll has been consistently accurate in recent elections – the Ipsos MORI/GfK exit poll. Theresa May's snap election gave us the challenge to set up and manage an exit poll in just seven weeks – a process that usually takes six months!

The BBC/Sky/ITV exit poll is a joint venture between Ipsos MORI and GfK, as the fieldwork is so vast that no one agency can do it all. The data is then analysed by a team of statisticians and political scientists, led by Professor John Curtis of the University of Strathclyde. The results are revealed live on television just as the polls close at 10pm on voting day. With several hours to wait until results come in, the exit poll is central to the coverage and punditry, so it's a very high profile piece of work for us and it is important it all goes well. It has been known to make Prime Ministers shed a tear, and the last three have been very accurate.

ELECTION BUILD UP

The exit poll involves choosing just 144 polling stations from around 50,000, and then making sure we do an accurate set of interviews at the chosen locations on election day.

Each election there are changes – this time the team of statisticians doing the analysis confirm they need additional information on the layout, number of entrances and Electoral Officers for 36 of the polling sites to accurately project the volume of interviews to conduct at each site. This is a bit of a headache for us, particularly as these 36 inspections around Britain need to be carried out within days so the information is available for the dispatch of materials and instructions.

It's a huge logistical exercise.

2,325 different documents to 525 interviewing teams

75 ballot boxes 21,000 ballot papers

75 handheld tally counters 4,200 pens

7,500 thank you/recruitment leaflets

DAY OF THE ELECTION

8 June 2017

05:30 – Wake up and start the big day with a journey to the GfK telephone unit in Luton. I'm not the only person with an early start; the desk-based team is heading to our Thomas More Square office in central London, and our regional managers have called the interviewers on the early shifts to make sure they are awake and on their way to their posts. Strong coffee and adrenalin will get us through the next 17 hours.

07:00 – First shifts start. Fingers crossed for a good day.

07.05 – Five minutes later, conscientious team leaders start to contact the office to check their electoral figures are correct. Don't panic!! – the difference between their figures and the information provided can be explained by the inclusion of the postal votes.

07:30 – Team leader at Forest of Dean Polling site in Gloucestershire reports the ballot papers have not arrived. Regional manager to the rescue with the replacement ballot papers!

08:30 – Reports of rain in the West and Scotland send the interviewers seeking shelter in doorways and under umbrellas. The Exeter Orwell Garth site has no toilet on location so the team have to pay a neighbouring family to use their toilet – the glamourous life of the exit poll!

10:30 – The first set of results from each polling site are telephoned to the GfK telephone unit. Other than a few teething problems with interviewers reporting figures in different orders, everything seems correct and the process runs to plan. On reviewing the results a few team leaders are re-contacted by the statisticians to adjust the numbers they need to approach.

11:25 – Reports from Newport – our interviewers have been banned from being anywhere on the premises by the Electoral Registration Officer. Four of Britain's Finest come to investigate, and with their help the team are allowed to continue defiantly in the rain, working out of a car. That's dedication!

General Election 2017 – diary of an exit poll

11:30 – 14.30 – Data comes through for the second, third and fourth phases of ballot paper results. Not all team leaders are as diligent with phoning through their results, meaning an urgent chase from the telephone centre to get the missing data. All issues resolved, data in – roll on the afternoon.

15.00 – Team leader swap over time. It's a nervous wait for the second teams to arrive, but 45 minutes later we can relax as everyone has arrived safely.

15.30 – Rain is still falling across the country, but spirits are reportedly high – including the Newport team who are working hard under the difficult conditions. Our interviewers are not the only ones waiting outside in the rain – #dogsatpollingstations is trending.

18.00 – 20.45 – Crunch time, where anything can go wrong – but must not go wrong! We receive reports that some polling teams have had to photocopy ballot papers due to higher than anticipated turnout. Data collected at this point is key for the statisticians. Everyone is on track to report the data to the analysis team in time for the results on the ten o'clock news. A deep sigh of relief across both sites, but it's not over yet!

22.00 – The polls close. Final numbers are reported by a tired team of interviewers. Backs, legs, everything now ache. Now it's time for everyone to sit back, recover and wait to see if the exit poll results reflect the actual results.

22:01 – Exit poll result is announced on BBC, ITV and Sky News. The nation is shocked with the predicted outcome of a hung parliament.

"I would say if the exit poll is as wrong everywhere else than it is in the first two results, it could be 80, 100 majority," said Peter Kellner, the former boss of the pollsters YouGov. "But if you dial it down, a majority of 30 or 40."

23:30 – After 17 hours at the heart of exit poll operations I drive home listening to senior politicians and political commentators doubting the results of the exit poll.

9 June 2017

Constituency results from across the country have confirmed the exit poll is, indeed, incredibly accurate (see overleaf). Now the country and the politicians need to deal with the fall-out.

Though it may not have been what the country and the politicians wanted to hear, the 2017 general election exit poll was a huge success for us – 26,272 interviews (14,142 by Ipsos MORI, 12,130 by GfK), conducted across 144 locations, all with only seven weeks' notice! Now it's time to sleep until the next election – hopefully not any time soon! ●

357 Interviewers

|66 Friends and family roped in to help out

58½ Average age of interviewer

|8 Average no. of years' experience

Top 5 polling sites:

1 Bolton South East (327 interviews)

2 Warwick & Leamington (312 interviews)

3 Norfolk South West (306 interviews)

4 Delyn (289 interviews)

5 Birmingham Selly Oak (251 interviews)
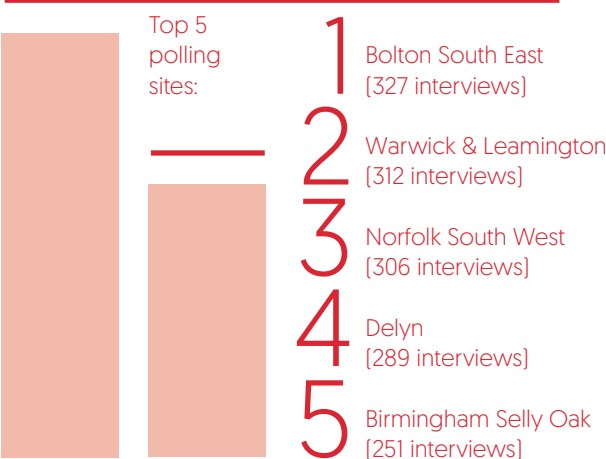
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General Election 2017 – diary of an exit poll

GENERAL ELECTION 2017
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Exit poll vs actual results

Conservative
314
318

Labour
266
262

SNP
34
35

Liberal Democrat
14
12

Others
22
23

Ipsos MORI/GfK
exit poll

GE 2017
Actual

SEVEN IN 10 PEOPLE EXPECTED THE CONSERVATIVES TO WIN A MAJORITY IN THE GENERAL ELECTION ON 8 JUNE 2017 [124]

Is the world getting better or worse?

IS THE WORLD GETTING BETTER OR WORSE?

BY BOBBY DUFFY
Managing Director,
Ipsos MORI Social Research Institute

Is the world getting better or worse? What do you think people said when we asked them, across 24 countries? Your first thought might be that this is such a ludicrously broad question that people would prevaricate. Which bit of this 200 million square mile planet do we mean, or which of the 7 billion inhabitants are we asking about? Or you could wonder which particular aspects we're thinking of – economics, the environment, politics, social issues?

But people don't fence-sit at all, their verdict is clear: we're all screwed. Just over one in ten think the world is getting better, one in five are not sure – but 67% think it's getting worse. The Chinese are the most positive (that's often the case), but 83% of Belgians think it's all going downhill.

Are people right to be so depressingly sure things are getting worse?

We run a series of studies on people's misperceptions – the Perils of Perception – where we ask respondents to estimate social realities and compare that with the actual data, which show we

Is the world getting better or worse?

Which of these is closest to your view?

World is getting worse   **World is getting better**
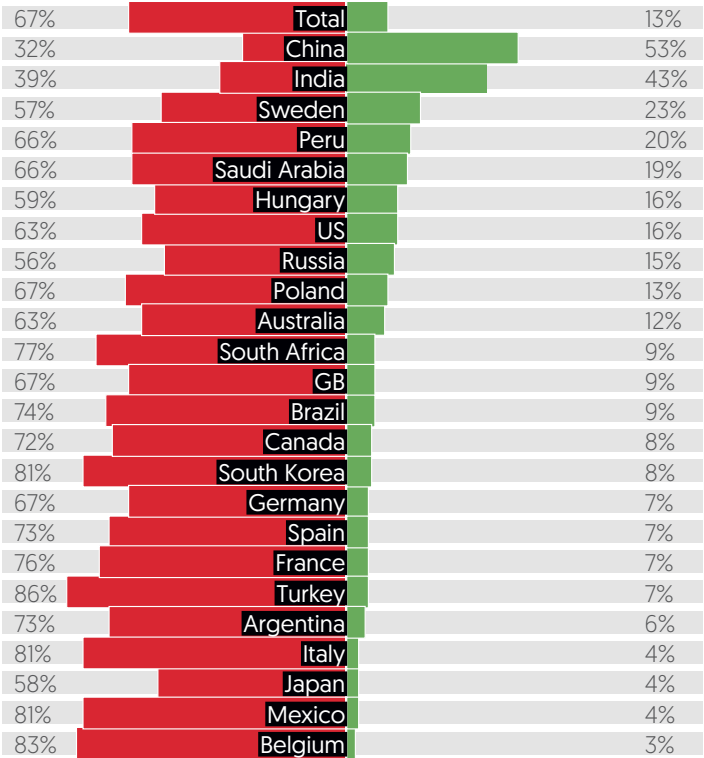
	World is getting worse	World is getting better
Total	67%	13%
China	32%	53%
India	39%	43%
Sweden	57%	23%
Peru	66%	20%
Saudi Arabia	66%	19%
Hungary	59%	16%
US	63%	16%
Russia	56%	15%
Poland	67%	13%
Australia	63%	12%
South Africa	77%	9%
GB	67%	9%
Brazil	74%	9%
Canada	72%	8%
South Korea	81%	8%
Germany	67%	7%
Spain	73%	7%
France	76%	7%
Turkey	86%	7%
Argentina	73%	6%
Italy	81%	4%
Japan	58%	4%
Mexico	81%	4%
Belgium	83%	3%

are often very wrong about the basics of our population and social
trends. But this sort of question on whether things are 'worse' or
'better' is obviously not the same: there is no definitive proof either
way, and plenty of counter-examples exist.

WE TREAT NEGATIVE INFORMATION DIFFERENTLY FROM POSITIVE INFORMATION. THERE IS AN EVOLUTIONARY ELEMENT TO THIS. NEGATIVE INFORMATION WAS OFTEN MORE URGENT, AND EVEN LIFE-THREATENING, SO WE HAD TO ACT ON IT

But there is a lot more to be cheerful about than we might think from people's answers.

The proportion of the world's population living in extreme poverty fell below 10% for the first time in the last couple of years. The death penalty has been removed from more than half of countries. Child mortality rates are more than half of what they were as recently as 1990. And 300,000 more people gain access to electricity each day. Even the giant panda has been removed from the list of endangered species.

And there's more. Deaths as a result of terrorism are lower in recent years than at the end of the 20th century in nearly all countries. It's the same for murder rates. Looking further back, in 1900 worldwide life expectancy was only 31, due to early adult death and rampant child mortality. Now it's 71.

So why are we so sure it's all going so wrong?

Part of the explanation is we treat negative information differently from positive information. There is an evolutionary element to this. Negative information was often more urgent, and even life-threatening, so we had to act on it: you have to take note when you're warned by your fellow cavemen about a lurking sabre-toothed tiger (and those who don't act get edited out of the gene pool).

Is the world getting better or worse?

So our brains handle negative information differently and store it more readily and accessibly than good news. There are a number of experimental psychology examples that show that, and scientists have even found signs of it in rats. Losing money, being abandoned by friends and receiving criticism all have a greater impact on us than winning money, making friends or receiving praise.

This stems from the very basics of our brain functioning. John Cacioppo showed pictures known to arouse positive feelings, like pizza or Ferraris, and those that stir up negative feelings, like a mutilated face or dead cat, and recorded electrical activity in the brain. The brain did indeed react more strongly to negative images. Further MRI studies by other academics confirmed that negative images are processed with different intensity in different bits of the brain.

Negative information is therefore attention-grabbing – while positive progress is gradual and incremental. We're not nearly as adept at spotting these trends as sudden and eye-catching disasters. As Max Roser from Oxford University points out, newspapers could have legitimately run the headline "Number of people in extreme poverty fell by 137,000 since yesterday" every day for last 25 years. But the predictable isn't newsworthy.

As Steven Pinker outlines in 'Better Angels of our Nature', our standards also shift. We judge governments or economic systems as falling short of standards we expect now – but this loses sight of the fact that those standards are shifting all the time. For example, we are outraged by examples of torture that were commonplace not that long ago.

It is this sense that we have become too pessimistic that has given rise to the 'new optimist' trend – a disparate group who have been corralled together by themselves and the media as trying to present a more positive picture of how the world is changing, and how it can be shifted further.

The media's reaction to this new optimism is (not without some irony) often pretty negative. The key criticisms are that pointing to progress lets us off the hook on how much further we have to go, and what we could have achieved if we had changed things more radically: global poverty may be down, but we could surely have

eradicated it if we had really tried. This optimism leads to a sense of complacency that progress is guaranteed, which is particularly risky in an increasingly interconnected and dangerous world.

But, from our long-term study of how people actually see social realities, this seems much less of a risk than the opposite – our tendency to overly focus on the negative, and feel overwhelmed by the sense that nothing can be improved. Paul Slovic, another psychologist, has studied 'psychic numbing' for decades, which is where the scale of tragedies or need for help drive us to inaction. One of the key lessons from this ground-breaking work was that we are much more likely to help the individual than the masses, and this has been proven time and again in fundraising campaigns: the single real-life story, with a named individual, constructed to evoke maximum sadness, helps us connect and donate.

But the same mechanism that turns us off the need to deal with not just one case of poverty but millions, also affects our belief that big challenges can be tackled at all. We see this all the time in the public's perspectives on climate change, for example [where the scale of the challenge is leading to falling concern]. So a lot of the criticism of the 'new optimist' perspective misses the point, by questioning whether we should really be so content about what has been achieved. The idea is the opposite: to encourage more action, by countering the prevailing sense that all is already lost. ●

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END NOTES

01.   The 2017 Ipsos MORI Young Person Omnibus is a survey of 2,612 young people aged 11-16 in England and Wales. Interviews were conducted between 6 February and 17 may 2017. Veracity index 2016: Ipsos MORI interviewed a representative sample of 1,019 adults aged 15+ across Great Britain. Interviews were conducted by face-to-face between 14th October – 1st November 2016.

02.   Ipsos MORI interviewed a representative sample of 998 GB adults by telephone on 10-14 February 2017. Data were weighted to match the profile of the population www.ipsos.com/ipsos-mori/en-uk/most-brexit-voters-want-more-members-leave-eu

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39. Interviews were conducted using the Ipsos Online
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     in 26 countries [Argentina, Australia, Belgium, Brazil,
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     India, Italy, Japan, Mexico, New Zealand, Peru, Poland,
     Russia, Saudi Arabia, Serbia, South Africa, South Korea,
     Spain, Sweden, Turkey and the United States].

40. Passive Perceptions, IPA Touchpoints 2017, 2,529
     phones and 788 tablets

41. Ipsos MORI conducted a survey for the Chartered
     Institute of Housing involving 2,195 adults aged
     16-75 online. The survey was conducted between
     9-13 June 2017. Data are weighted to the known

End notes

population profile.

42.   Ipsos MORI conducted a survey for London Councils involving 1,004 residents aged 18+ living in Greater London using Computer-Assisted Telephone Interviewing [CATI]. Fieldwork took place between 14th September and 4th October 2017. Data are weighted to the known population profile.

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44.   Ipsos MORI's Issues Index is conducted monthly and provides an overview of the key issues concerning the country. Ipsos MORI interviews a representative quota sample of c. 1,000 adults aged 18+ across Great Britain each month. The questions are spontaneous - i.e. respondents are not prompted with any answers. Data are weighted to match the profile of the population.

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49.   Ipsos MORI interviewed a sample of 504 adults

aged 15+ living in Greater London. Fieldwork was undertaken face-to-face, in-home, between 29 January and 26 February 2016 on Ipsos MORI's face-to-face omnibus (Capibus).

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trust-falls-down

57.   The research comprised a survey among members of Ipsos MORI's online panel, with the sample drawn to be representative of the population of Scotland in terms of sex, age, region and working status. The survey ran from 22 February until 2 March 2017

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60.   Ipsos Connect BBC VR In-home usage, ethnographic study, May-July 2017

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62.   Ipsos MORI RSC study, May 2017. Base: 90, Age: 16-85, UK

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End notes

76. Ipsos Connect and BBC, 3,007 online surveys between 25 August and 6 September 2017. This data consisted of 1,003 16-22 year olds, and 2,004 23-71 year olds (in nationally representative proportions).

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79. Ipsos Connect and BBC, 3,007 online surveys between 25 August and 6 September 2017. This data consisted of 1,003 16-22 year olds, and 2,004 23-71 year olds (in nationally representative proportions).

80. Ipsos Connect and BBC, 3,007 online surveys between 25 August and 6 September 2017. This data consisted of 1,003 16-22 year olds, and 2,004 23-71 year olds (in nationally representative proportions).

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105.   The survey was conducted via Ipsos MORI's online
           global panel among a sample 2,002 women aged
           30-80 years old across the UK [England, Scotland,
           Wales and Northern Ireland]. Interviews were
           conducted between 26th April and 1st May. Quotas
           were set and survey data was weighted by age
           and region to the known population proportions of
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112.   Ipsos MORI interviewed a representative sample of 998 GB adults by telephone on 10-14 February 2017. Data were weighted to match the profile of the population www.ipsos.com/ipsos-mori/en-uk/half-public-support-more-immigration-highly-skilled-workers

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124.   Ipsos MORI interviewed a representative sample of 1,053 adults aged 18+ across Great Britain. Interviews were conducted by telephone 15th-17th May 2017.

125.   The survey was conducted via Ipsos MORI's online global panel among a sample 2,002 women aged 30-80 years old across the UK [England, Scotland, Wales and Northern Ireland]. Interviews were conducted between 26th April and 1st May. Quotas were set and survey data was weighted by age and region to the known population proportions of women aged 30-80. www.ipsos.com/ipsos-mori/en-uk/womens-health-concerns-uk

End notes

30-44 YEAR OLD WOMEN ARE MOST SATISFIED WITH THEIR SEX LIVES WITH 42% FAIRLY OR VERY SATISFIED [125]

The Ipsos MORI Almanac is our light-hearted(ish) review of life, society, business, media and politics in 2017, with contributions and data from around the business.

We hope you enjoy our 2017 Almanac. Please let us know what you think!

GAME CHANGERS   Ipsos