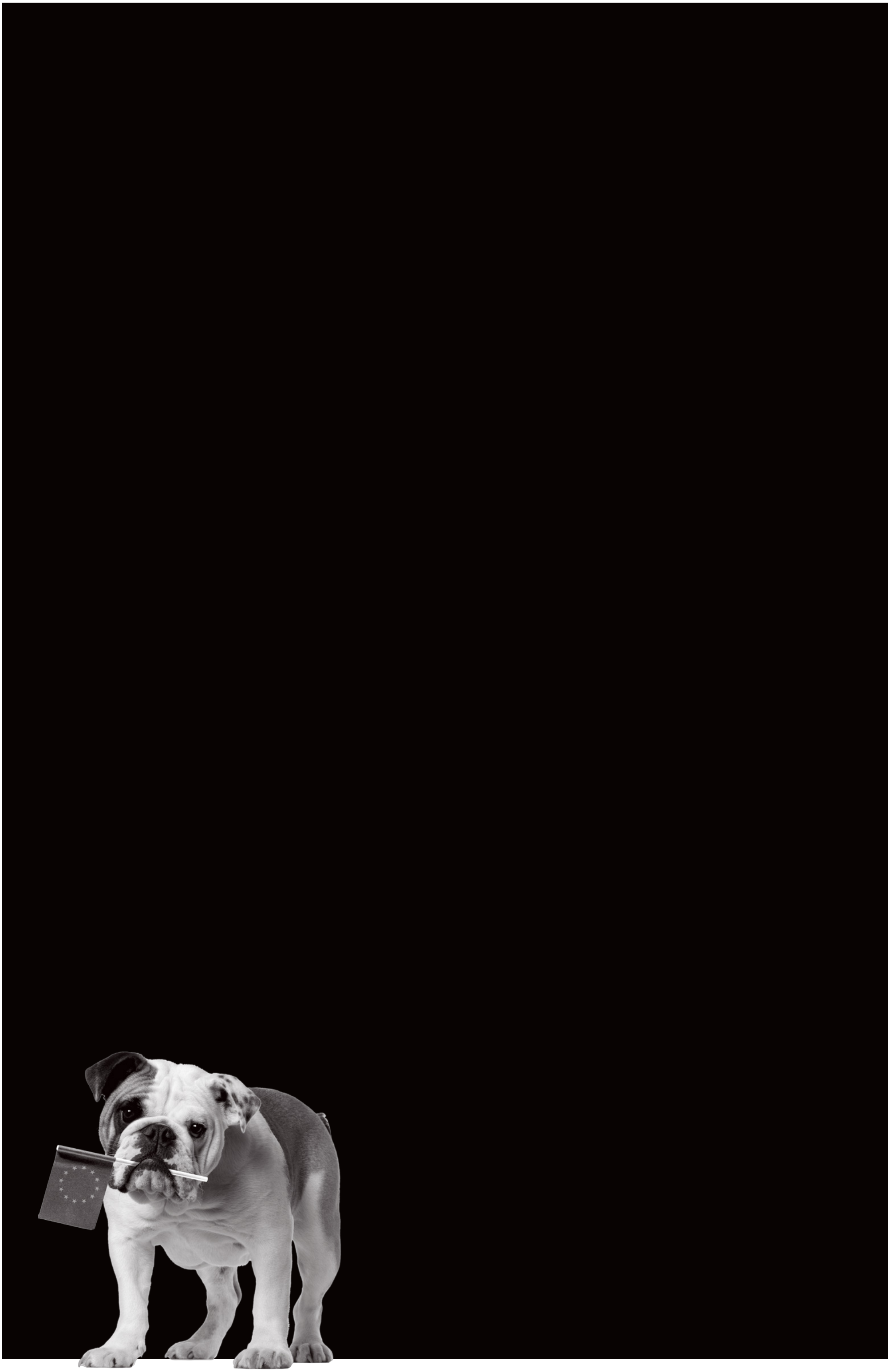
Ipsos MORI

THE IPSOS MORI

ALMANAC

2016



Ipsos MORI, part of the Ipsos group, is one of the UK's largest and most innovative research agencies, working for a wide range of global businesses, the FTSE100 and many government departments and public bodies.

We specialise in solving a range of challenges for our clients, whether related to business, consumers, brands or society. Our areas of expertise range from communication, media, innovation and healthcare research through to stakeholder management, corporate reputation and social and political research.

We are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

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FOREWORD

What a year! At one point I was worried that we wouldn't have much to write about in this year's Ipsos MORI's Almanac, but 2016 is a massive reminder that history never moves in straight lines. Millions of words have - and will - be devoted to explaining what drove Britain to Brexit and America to Trump – we cover both here. Inevitably we look at the art, science and judgement involved in political polling, which forms 0.1% of our work, but attracts most of the publicity.

Join us as we look at all aspects of life in Britain and further afield, from first dates, men in makeup, virtual reality, sugar and dieting, the best and worst politicians, celebrity deaths, what you are doing on your phone, immigration, the NHS and much much more.

To me the key words at the end of 2016 for anyone in business or politics must be uncertainty and fragmentation. History doesn't proceed in an orderly fashion, and we face huge unknowns. The organisations that succeed in 2017 will be those that are most adaptable and resilient.

I hope you enjoy this year's edition and look forward to seeing you at one of our events next year.

All the best for Christmas and a successful 2017.

Ben Page
Chief Executive, Ipsos MORI
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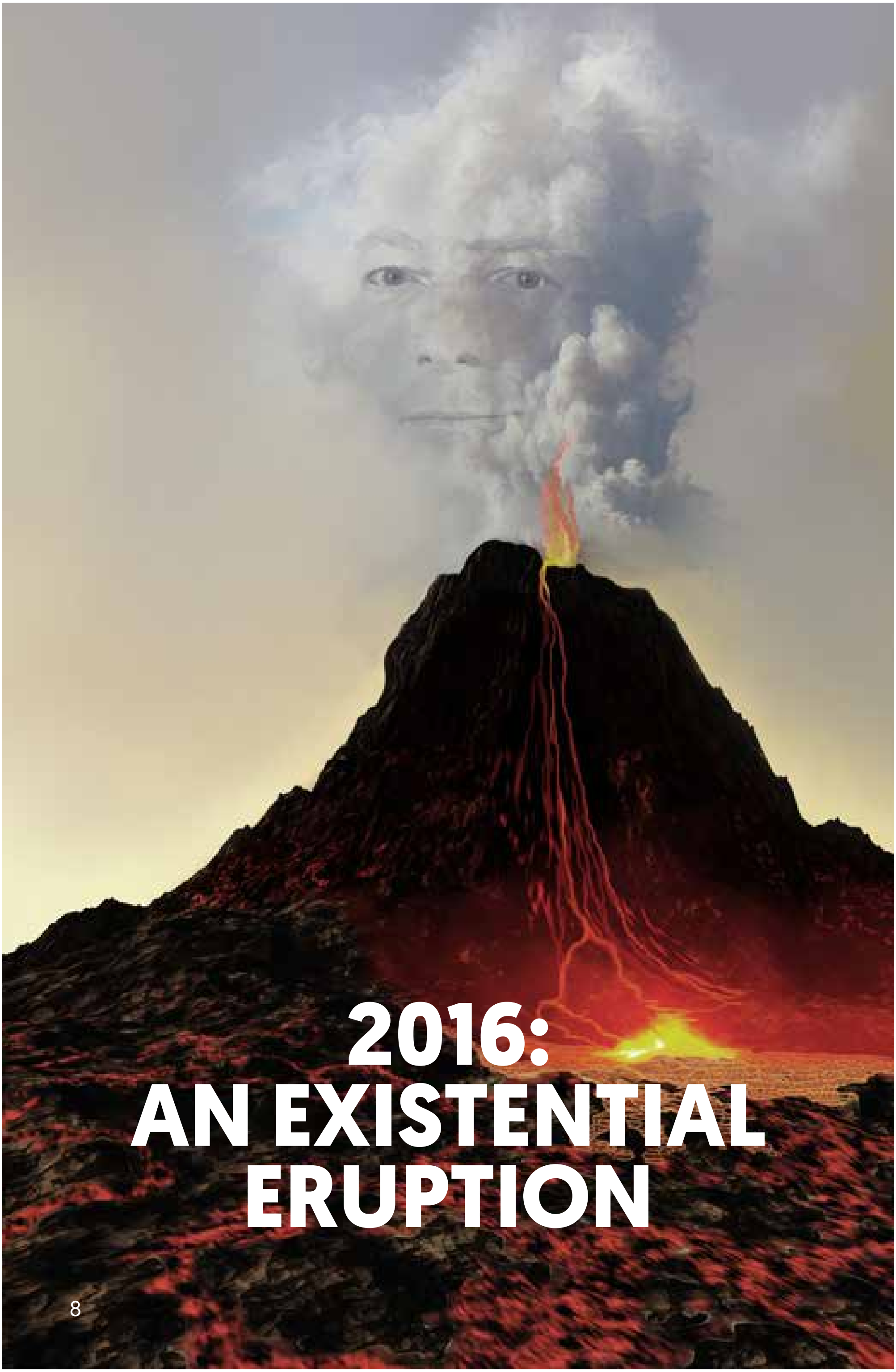


2016: AN EXISTENTIAL ERUPTION

BY BEN MARSHALL
Research Director
Ipsos MORI Social Research Institute

A short time after the EU referendum I saw a tweet in my timeline prophesying that 'in about 20 years' time the answer to any pub quiz question will be 2016'.[01] You can see the reasoning; the year started with a glut of celebrity deaths, Leicester City won the Premier League as 5,000-1 outsiders, astronaut Tim Peake became the first Briton to participate in a spacewalk outside the International Space Station, then there was Brexit, the resignation of the Prime Minister, a record medal haul for Team GB in Rio, and then President Trump.

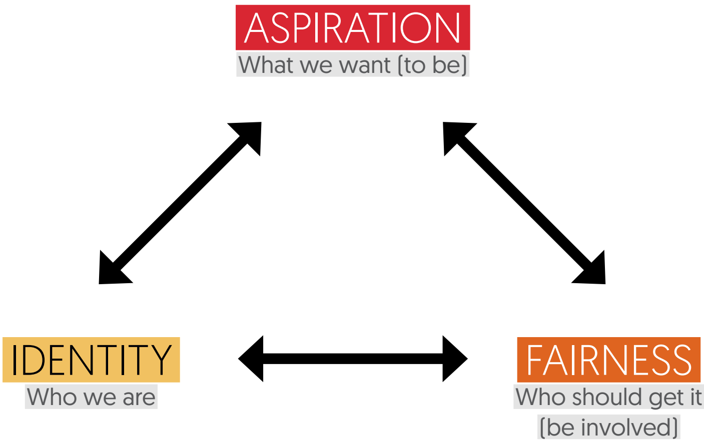
2016 has been remarkable in many ways, but Brexit was the take-your-breath-away moment. While the term hasn't yet made the Oxford English Dictionary – apparently because of its shifting meaning[02] – it will surely be on the shortlist of words of the year (as it was last year[03]) and will shape Britain for many years to come.

There has been much dissection of the 52% vote for 'Leave' and what it says about Britain.[04] What is clear is that Brexit was not made in 2016; rather, it was the moment we looked in the mirror and saw changes to our appearance, changes which had been creeping up on us for many years. As historian Robert Saunders put it the day after the vote, "The referendum has exposed – but not created – a crisis in our representative system. That crisis has been building for some time, but last night it erupted in full force."[05]

There are likely to have been many reasons for Brexit, but what 2016 has revealed is that our world views really matter and they are splitting our country, our localities, our workforces, even our families and friends. The troika of tensions I described as integral to British socio-culture in last year's Almanac – identity, aspiration and fairness – cut through in spectacular fashion.

Like many of my colleagues I was reminded of the surveys and discussion groups which, in hindsight, didn't exactly foretell Brexit

KALEIDOSCOPIC BRITAIN:
THREE TENSIONS



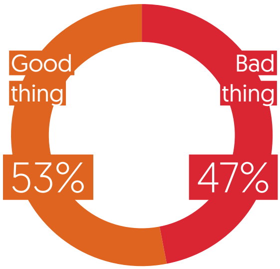
but did point to the multitude of forces which caused it to happen and which reveal what Britain is like today. Thus, for example, our 2013-14 Global Trends Survey found many, not all, Britons unconvinced about the merits of globalisation, strongly attached to tradition, and concerned about the pace of change.

The referendum results similarly showed division; in Scotland, 38% voted Leave but it was 59% in the Midlands, and only 40% in London. These differences reflect quite different cultural standpoints. To put it in terms of brand preference, as one study did this year, while HP Sauce and Bisto are 'Leave' brands, Remainers prefer BBC iPlayer and LinkedIn.[06]

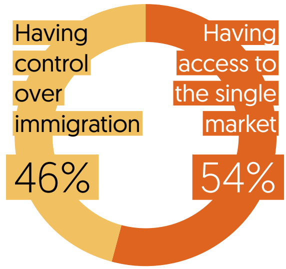
Reflecting again on focus group discussions with Britons over recent years, pretty much any topic quickly leads to references to 'them' and 'they'. When we ask who 'they' are, we are told the people in charge, those outside the 'real world' ['others' also extends to immigrants]. This is symptomatic of a deep disconnection, not just with Westminster and the 'bubble' [and in many places, London], but also with the economy, with many struggling to comprehend how

DIVIDED BRITAIN: PRE - AND POST - THE BREXIT VOTE

Globalisation is good for Britain?



Priorities for Britain's relationship with the European Union



Source
Globalisation: Ipsos MORI Global Trends Survey

Priorities: Ipsos MORI Political Monitor

Base
Globalisation: 1,000 British adults, 3 – 17 September 2013

Priorities: 1,016 British adults, 14 – 17 October 2016

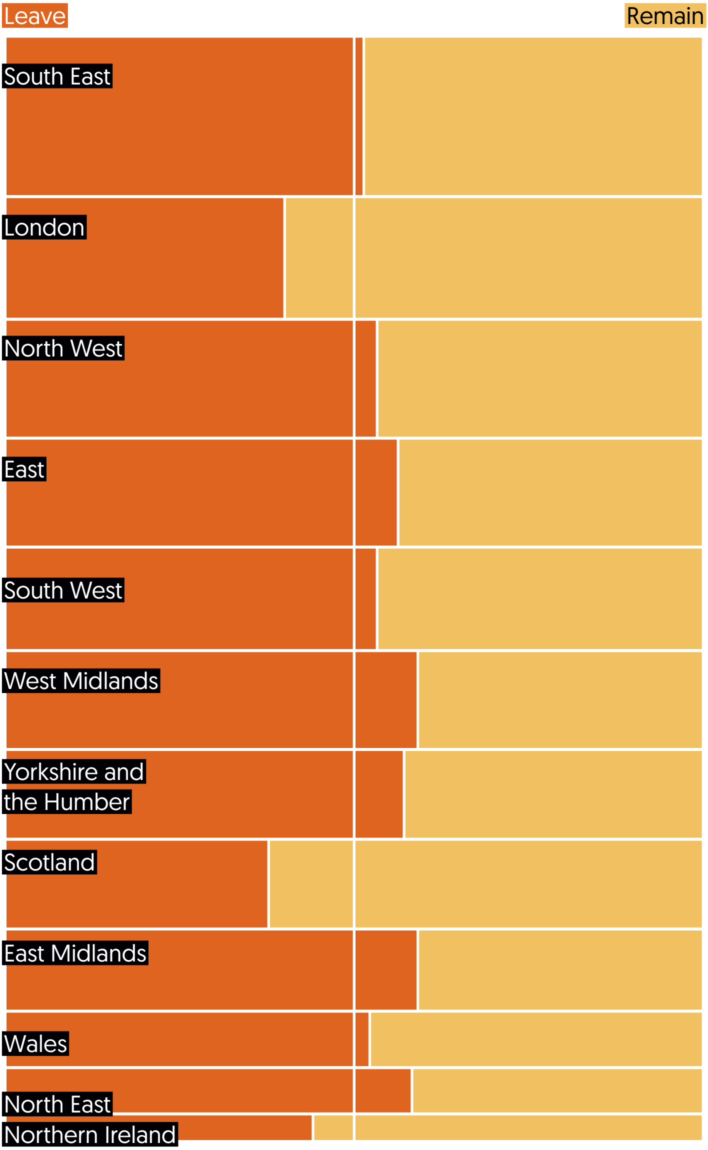
this works and who it actually works for. Their sense, though, is that it needs rebalancing, if not rebuilding; a case of 'the economy stupid', and the stupid economy.

'Politicians' and the 'boss class' are considered inept, impotent or disinterested (or all of these) and the change anxiety described in previous Almanacs is heightened by a sense that no one is in control, making 'Take Back Control' such a potent message. Alongside this, there is a sense of nostalgia and pessimism; a feeling that we "don't make anything anymore" and that "Britain is falling behind". This compounds perceived injustice, worries about inequality and the uneven effects of austerity. We also detect sensitivity about the decline of towns and high streets, overseas investment and locals being 'priced out' of homes and jobs.

The lived experience for many Britons over the past few years has been one of subtraction and sacrifice; they quietly yearn for something to be positive about, for an injection of 'something'. During the referendum campaign David Cameron might have described the referendum as "existential" – a high-stakes vote on the future of Britain – but many felt they had nothing left to lose.

HOW LEAVE WON THE REFERENDUM

Area of bars is proportional to votes cast, largest areas shown first



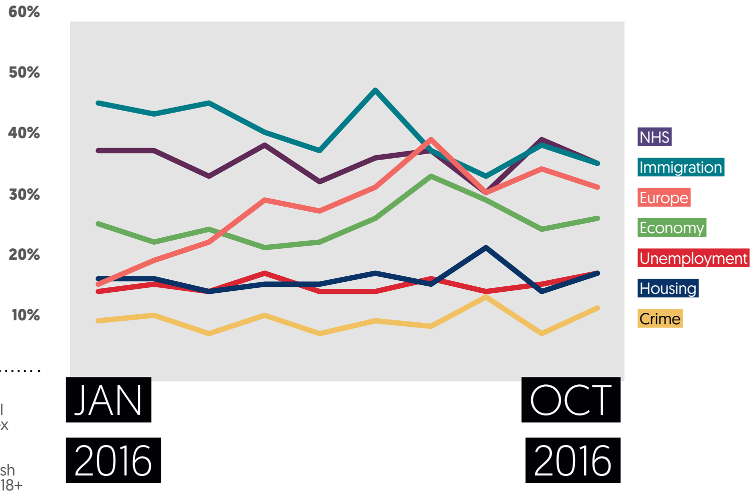
Source
BBC
www.bbc.co.uk/news/uk-politics-36616028

Then there's immigration. In June our monthly Issues Index recorded 48% of the population were concerned with immigration and in the final two weeks of the referendum campaign it replaced the economy as the top-ranked issue which would impact how people would vote. This year our colleagues in the States drew parallels between Brexit, the rise of Trump and Western Europe's right-wing parties. The common denominators are cultural detachment and immigrants being perceived as the cause of long-term economic uncertainty.[07]

While this year has seen the election of the first Muslim Mayor of London, it has also witnessed the tragic killing of Jo Cox MP and a sharp rise in hate crimes.[08] But just as we are now seeing those sceptical about house-building prefacing their opposition with "I'm not a nimby but ...", so those worried about immigration have tended to ditch the apologetic preamble they used a few years ago. Yes, there are wild inaccuracies and misperceptions, but the public often have legitimate concerns about public policy (including immigration), and are united by a sense that they matter little in the scheme of things.

ISSUES FACING BRITAIN: 2016

What do you see as the most/other important issues facing Britain today?



Source
Ipsos MORI Issues Index

Base
c.1,000 British adults age 18+ each month

ARE WE ACTUALLY INVESTING ENOUGH IN LISTENING AND OBSERVING?

None of this is particularly new. But Brexit brought these strands together, tying up several loose ends. We will see what Brexit means, and time will tell whether and how it can be delivered in our fragile coalition of a country, but it is clear that things will have to change. Received wisdom is that public policy in post-Brexit Britain must deliver for the 'left behinds' and, sensitive to this, both Theresa May and Jeremy Corbyn have set out their (very different) stalls to achieve a step-change in social mobility and opportunity.

There are some grounds for optimism. First, we should not over-state division because the British have much in common – so much so that it is rare in our surveys to find 52%-48% splits in responses to attitudinal questions! Second, devolution and technology offer an opportunity to reset politics. Moreover, Britain probably isn't more 'ungovernable' than it was in 1970s or 1980s, and the interventionist state described by Theresa May can still make a difference.

But there must surely be a big question mark about how much we actually understand our country, even in our data-rich times. Are we actually investing enough in listening and observing? Do we leave our particular bubbles often enough to see kaleidoscopic Britain through a different lens?[09] Surely we need more 'ground truth',[10] and for the metropolitan punditry class to spend more time outside London.

2016 has been a remarkable year; a year of change, a cause and effect of change anxiety. Will next year be dull and unspectacular by comparison, the answer to very few pub quiz questions? I'm not so sure. ●

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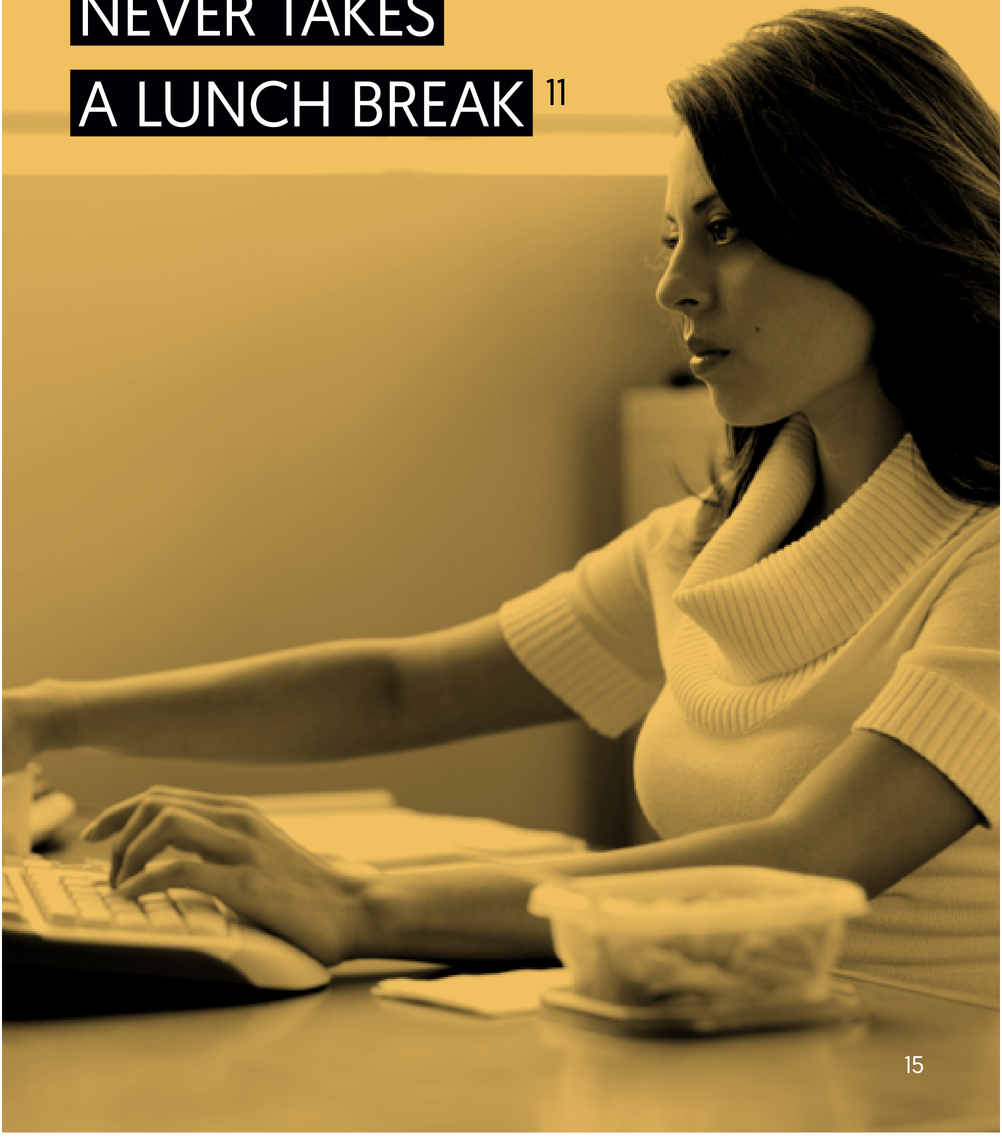
ONE IN EIGHT BRITISH WORKERS NEVER TAKES A LUNCH BREAK [11]



HOW LONG CAN A HONEYMOON LAST?

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

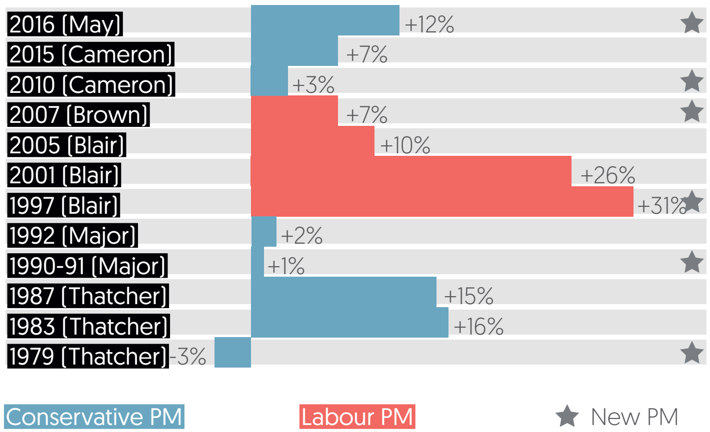
The Conservatives have been ahead of Labour every month in our polls since May 2015, and 2016 is no different. In fact, their lead at the end of October was greater than it has been for seven years, at 18 points. But that shouldn't be a surprise – it's obvious we are in a honeymoon period following Theresa May's ascension to Prime Minister in the summer, and honeymoon periods in politics are not exactly unheard of. The more important question is does this honeymoon look any different from previous ones, and should we expect it to last?

For the Conservatives, public opinion seems to be pretty much in line with previous honeymoons. Theresa May's party has an average lead over Labour in her first three months of 12 points, which compared with others we've seen since 1979, comes in at mid-table (although if we strictly define honeymoons as for a new Prime Minister, it looks better than everyone except Tony Blair). A ten-point lead in the first three months after 2005 didn't presage a win for Labour five years later, but a fifteen-point lead for the Conservatives after 1987 did – though of course it's foolish to pretend these make up an immutable law. There is however one

How long can a honeymoon last?

AVERAGE GOVERNMENT LEAD OVER FIRST THREE MONTHS

After General Election or new Prime Minister



Source
Ipsos MORI Political Monitor. 1979 figures from Gallup, sourced from Mark Pack's opinion poll database

Base
c.1,000 British adults aged 18+

notable difference in the pattern – both the Conservatives from 1983 to 1992 and Labour from 1997 to 2005 suffered from a form of political gravity, with each successive honeymoon lower than the last. Theresa May's honeymoon, on the other hand, is much larger than David Cameron's after both 2010 and 2015.

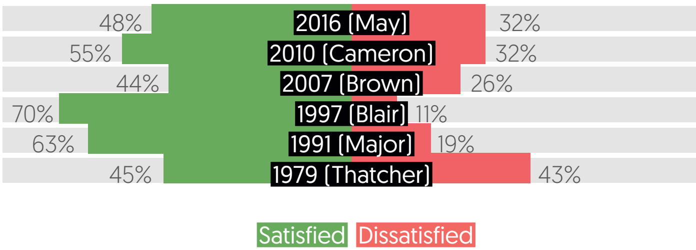
We see a similar picture in Theresa May's personal ratings. Satisfaction with the way she is doing her job is very much par for the course for a new Prime Minister – not as high as Tony Blair or John Major achieved when they first took office (it is often forgotten how high Mr Major's ratings were at the start), but they are better than Margaret Thatcher in 1979, and otherwise pretty similar to David Cameron's after 2010. In other ways too, some of the fundamentals remain unchanged. Just like David Cameron was, Theresa May is much more liked than her party (in fact, at 60% her likeability score is higher than he ever achieved), but on the other hand her succession has not changed the Conservative's branding problem she identified in that famous 'nasty party' speech in 2002. Like David Cameron, she seems to have captured many of the key traits the British public most wants in a party leader, such as being

THERESA MAY IS HAVING A 'NORMAL' HONEYMOON SO FAR

Are you satisfied or dissatisfied with the way ... is doing his/her job as Prime Minister?

Source
Ipsos MORI Political Monitor

Base
Base: c1,000 British adults 18+ each month. *NB August 2010 figures for David Cameron not available, so ratings after two months given instead



capable and having sound judgement, while not suffering from some of the same disadvantages as being seen as out of touch or more style than substance.

Naturally, it is likely that Theresa May's image will suffer if the economy falters or the government is hit by splits and scandals, and all the data above helps put her current honeymoon into perspective; all other things being equal, it should be taken on its own terms – broadly par for the course for a new Prime Minister, with little to suggest it can be relied on to last forever. But, of course, just like any marriage, not all other things are equal, and there is another partner to take into account.

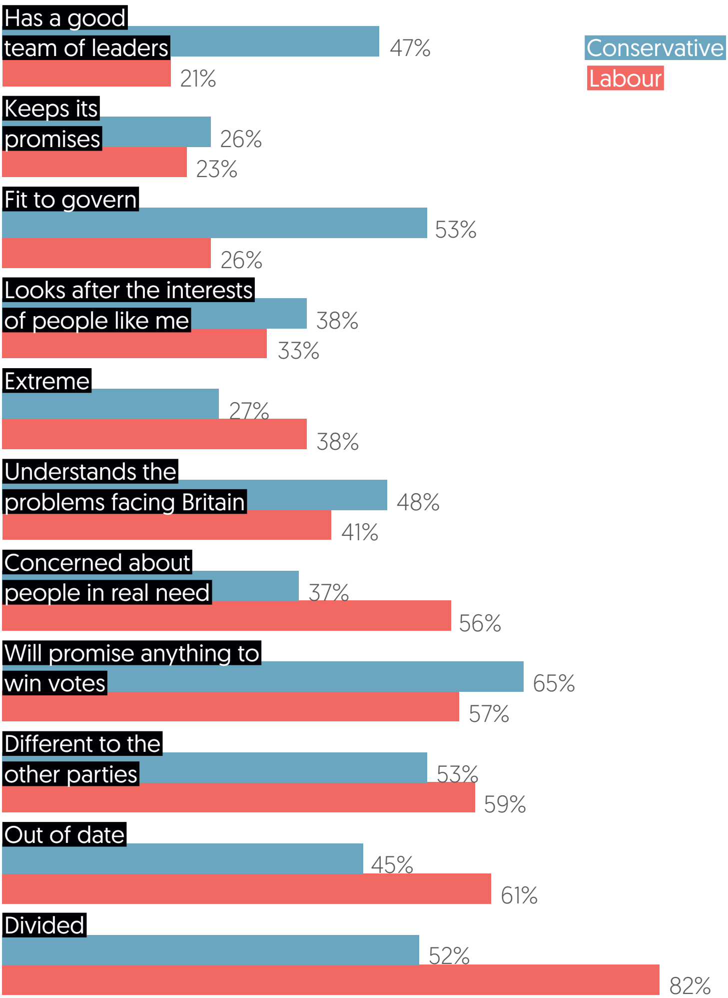
Jeremy Corbyn has been leader of the Labour party for more than a year now, so probably out of his honeymoon period, and despite his critics within the party, attempts at a divorce haven't got past the flirtation stage. So what do the public think? There has been little change in Labour's voting share since then – stuck around 30% for most of the last year (the Conservative's increased share is mostly at the expense of UKIP) – but the detailed image ratings

SHE SEEMS TO HAVE CAPTURED MANY OF THE KEY TRAITS THE BRITISH PUBLIC MOST WANT IN A PARTY LEADER

How long can a honeymoon last?

PARTY IMAGE: LABOUR VS CONSERVATIVE

I am going to read out some things both favourable and unfavourable that have been said about various political parties. Which of these, if any, do you think apply to...



Source
Ipsos MORI Political Monitor.

Base
1,016 British adults aged 18+, 14-17 October 2016

LABOUR'S RATINGS ON KEY COMPETENCY ISSUES SUCH AS HAVING A GOOD TEAM OF LEADERS AND BEING FIT TO GOVERN HAVE FALLEN, WHILE A VERY HIGH 82% THINK IT IS DIVIDED

are more worrying for the party. In the last year, Jeremy Corbyn's personal ratings on being capable, good in a crisis, having a lot of personality and a clear vision for Britain are all down, and he is further behind Theresa May than he was Cameron.

Further, although more people now say they like Labour than a year ago (albeit with one in four saying they like the party but not the leader), there are signs that the party as a whole is suffering too. Compared with this time last year, Labour's ratings on key competency issues such as having a good team of leaders and being fit to govern have fallen, while a very high 82% think it is divided. Labour is dropping on some 'softer' issues too, notably 'understanding the problems facing Britain' and 'looking after the interests of people like me', where the Conservatives are ahead for only the second time in the last 33 years. Indeed, on many ratings Labour is doing worse than under Ed Miliband, so while the object of affection may have changed, the public's fundamental doubts about Labour's readiness for government show no signs of doing so.

This honeymoon, then, looks like a lopsided one. It may well be Labour's weaknesses, rather than the Conservatives' strengths, that last the longer. ●

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GO HOME 2016, YOU'RE DRUNK!

BY BOBBY DUFFY
Managing Director
Ipsos MORI Social Research Institute

Go home 2016, you’re drunk!

Most people in most countries think their country is going wrong.

The outlook is extraordinarily bleak in places: in Mexico and France nearly everyone (89%) thinks their country is on the wrong track. Europeans are particularly gloomy – even in countries that are typically viewed as successful, like Germany and Sweden. Britain has a very average level of miserableness. Typical, we don’t even excel on our home turf of moaning.

It’s tempting to lay the blame for this dark outlook on an extraordinarily bad year (particularly if you were a ‘Remain’ or Clinton voter). Type ’2016’ into Google and you’ll get dozens of articles asking whether 2016 is the worst year ever. But pretty much every piece concludes with some variation of “No. Get a grip. 1347 sucked a bit harder, when the Black Death wiped out a third of Europe”.

So what’s our problem? Well, for starters, the Medievals didn’t have Twitter, to share and amplify their grief and fears.

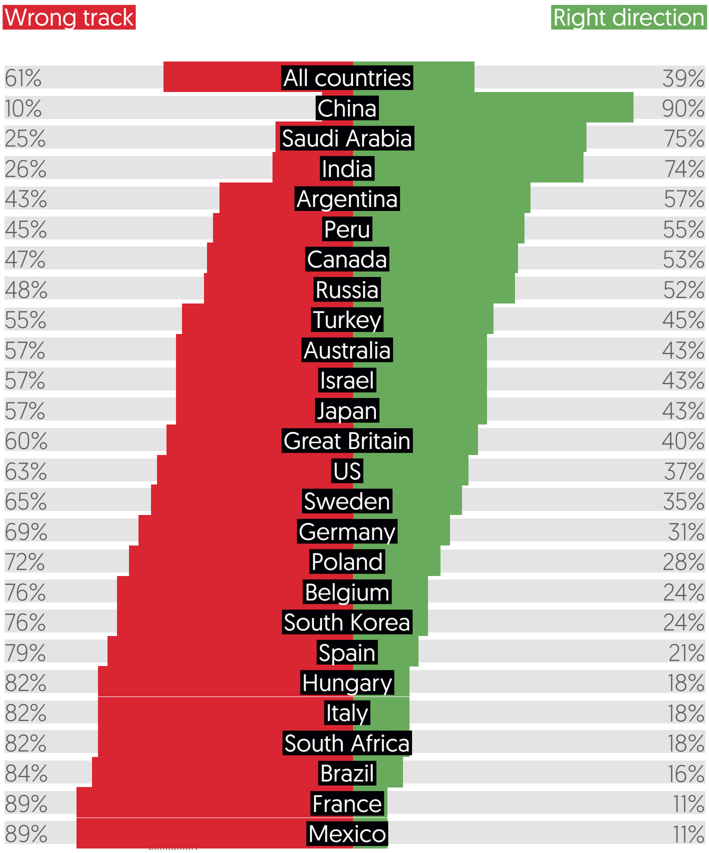
> “I’M NOT SAYING THAT DAVID BOWIE WAS HOLDING THE FABRIC OF THE UNIVERSE TOGETHER, BUT *GESTURES BROADLY AT EVERYTHING*”
>
> Katie Loewy (@SweetestCyanide)

More to the point, there are two very important caveats from Ipsos’ monthly What Worries the World survey.

First of all, we’re not actually any more worried now than in the other seven years we’ve been running the study. In every single month of every year, around 60% say things are getting worse. Individual countries go up and down, but there is a pretty settled level of global ‘misery’.

RIGHT DIRECTION / WRONG TRACK

Generally speaking, would you say things in this country are heading in the right direction, or are they off on the wrong track?



Source
Ipsos Global Advisor

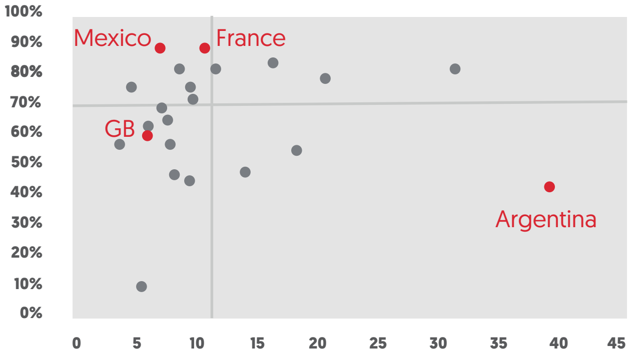
Base
Representative sample of 18,064 adults aged 16-64 in 25 participating countries, September 23 – October 7 2016

But, second, this is not actually a story of global misery. Far from it, when you look more carefully. As you can see from the chart above, seven countries are more positive than negative – but these include some of most populous nations in the world. The survey covers countries with 4.3bn citizens, and nearly 3bn of these live

WRONG TRACK VS. MISERY INDEX SCORE

Generally speaking, would you say things in this country are heading in the right direction, or are they off on the wrong track?

% who say country on wrong track



'Misery Index' score

Source
Wrong track: Ipsos Global Advisor
Misery Index score: 2016 projected figures

Base
Wrong track: Representative sample of 18,064 adults aged 16-64 in 25 participating countries, September 23 – October 7 2016

in nations where the majority in the study are positive – mainly because of the very upbeat view in China and India.

Of course this is an online survey, so this isn't representing poor, rural populations in developing countries who may have a different view. But it's certainly a tale of two worlds, at least among the middle classes: fast-growth emerging markets versus the stagnant West and stalled countries in LatAm.

It isn't all about economics. If we compare the view from our survey with objective measures of the economic direction countries are going in, there are many outliers. The 'Misery Index' was developed by a US economist in the 1960s to summarise who's going through the toughest economic times, looking at inflation and unemployment. It's a pretty poor fit with our data – with countries like Mexico and France more miserable than they should be, and Argentina far happier than expected (maybe as the result of anticipated improvements from their bold, business-friendly President, Mauricio Macri).

BUT IT'S CERTAINLY A TALE OF TWO WORLDS, AT LEAST AMONG THE MIDDLE CLASSES: FAST-GROWTH EMERGING MARKETS VERSUS THE STAGNANT WEST AND STALLED COUNTRIES IN LATAM

So to get a better idea of exactly why people are concerned for their country, we ask a further question on what their main worries are. The breadth, variety and scale of concerns is so extraordinary.

Across all 25 countries, unemployment comes out as the most worrying topic (mentioned by 39% on average), followed by corruption, poverty and inequality (both 32%), and crime (30%). Of the 25 countries:

- Eight put unemployment top
- Four choose terrorism
- Four say crime
- Three choose corruption
- Two each pick healthcare and poverty/inequality
- And one each put moral decline (China) and immigration (Britain) as of concern to most.

But there are also some clear themes within this variation. For example, in LatAm countries, concern about crime and violence is extremely high (with 70% in Mexico picking this out – which may go some way to explaining why they're so unhappy). In much of

Europe, it's unemployment that dominates. Concern about terrorism is driven by events, but it's a top fear every month in Turkey and Israel. Britain is consistently the only country to put immigration at the top of the list, even if other countries see similar proportions mentioning it (with a steep rise in Germany over the last year).

Just as notable is which issues aren't breaking through into the public consciousness. UN Secretary-General Ban Ki-moon has said "climate change is the defining challenge of our time". In our survey, however, the average number saying threats to the environment is a top concern doesn't break double figures. The exception is China, where it's second in the list.

So it's really not a picture of global gloom – or global anything. Studies like this are a vital reminder of the sheer variety of contexts and subtlety in concerns across the globe. It may not be a wonderful world, but it's definitely not dull. ●

To get in touch with Bobby,
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MORE THAN HALF (55%) OF BRITISH PEOPLE THINK COUPLES SHOULD SPLIT THE BILL ON A FIRST DATE AT A RESTAURANT, RISING TO 64% OF 16-25 YEAR-OLDS [12]


47%
OF PEOPLE SAY THEY
WANT TO TRY A
VIRTUAL REALITY HEADSET

VIRTUAL REALITY: DON'T BELIEVE THE HYPE ... YET

BY NEIL STEVENSON
Research Manager
Ipsos Connect

You've probably come across the VR-hype train by this point. It's pushed by media organisations, VR companies, techy types and hardware providers. Breathless punditry has claimed 2016 the breakthrough year for Virtual Reality.[13] Goldman Sachs has global projections of the Virtual Reality/Augmented Reality market being worth up to $182 billion in 2025, similar to the market for notebooks and desktops.[14]

However, for VR to reach the heady heights of current prognostics, there will need to be massive consumer uptake across multiple categories.

So what's the actual state of play for consumers, brands, and market research companies?

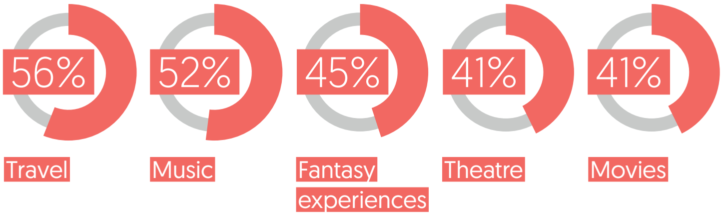
European data shows that 75% of people feel they don't know enough about VR and 73% would wait before buying a headset.[15]

In the UK, the data shows an interested public, but one that is yet to be convinced of the value and legitimate application of VR technology outside of gaming.

Virtual reality: Don't believe the hype ... yet

Many people (47%) say they want to try it out; however, barriers to usage are cost (66% say devices are too expensive), and a perception that the technology is mainly for gamers (60%) or doesn't have a practical use (46%). Sixty-eight percent of people said they would have to try it out first to see if they like it. This highlights a key challenge: getting headsets on the heads of consumers.

WHAT EXPERIENCES WOULD YOU LIKE TO HAVE WHEN USING VIRTUAL REALITY?



Source
Ipsos MORI

Base
1,117 adults in the UK aged 16-75, April 2016

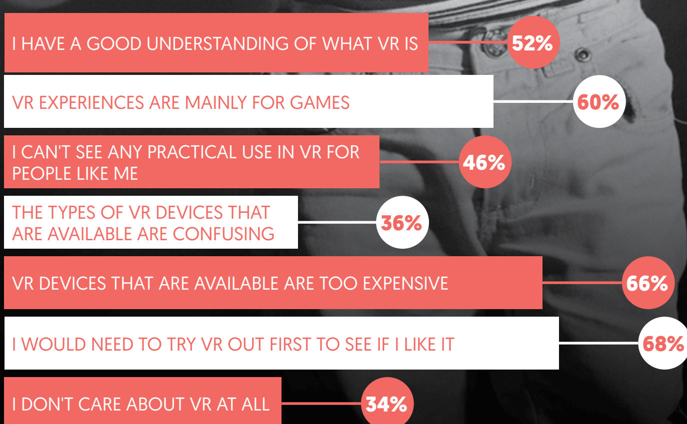
Consumers say they are open to a range of VR experiences: yet there is no one stand out VR experience. This is likely because most people are simply not familiar with what VR experiences could or should look and feel like, making judgements about it difficult.

Everyday consumers are ultimately unsure about VR. Prices will need to come down substantially and relevant experiences made more obvious for consumers to adopt this technology.

Herein lies the conundrum for brands. VR requires consumers to seek out the content relevant to them and then engage with it. To succeed in this niche space, brands will need to create engaging content that isn't gimmicky. Good efforts do currently exist from Coke (you can ride a sleigh with Father Christmas), Topshop (experience a fashion show), and McDonald's (turn the Happy Meal box into VR goggles and go on a ski slope), but these all still feel experimental and have not achieved cut-through.

Yet in industries with obvious applications, virtual reality is readily adopted. Healthcare is a case in point. Virtual reality is being used with success to treat patients with phobias via (virtual) exposure therapy, as well as allowing surgeons to teach and practice

CONSUMER OPINION ON VIRTUAL REALITY



Source
Ipsos MORI

Base
1,117 adults in the UK aged 16-75, April 2016

complex surgical techniques. Real estate is another industry where the benefits of VR are clear; why traipse around town looking at houses when you can do it from the comfort of your sofa using VR? Education and training are other obvious places where virtual reality simulations can offer value – particularly in areas where 'real life' training is costly or dangerous, such as the military or aeroplane pilot training. It's no accident that one of the leading lights for VR is immersive news stories. Media outlets such as the Guardian and New York Times have successfully harnessed the technology for short-form documentaries – allowing viewers to literally walk a mile in the shoes of a Syrian refugee. These immersive films create an emotional, compelling and memorable experience.

Brands getting VR right will enjoy big first mover advantages and, much like in online viral content, it is likely to be forms of branded content, and not straight out advertisements that win out. Experiences that are rare, risky, or convey desirable information efficiently are likely to resonate with consumers. And that's without mentioning pornography!

Finally, market research organisations are exploring VR. There are currently three broad uses for VR in market research. The first is observational. We've been using 360 cameras placed in-home with great effectiveness as a means to observe people – their routines and interactions, how they engage with media, as well as one study on getting to grips with different types of passionate football fans.

EVERYDAY CONSUMERS ARE ULTIMATELY UNSURE ABOUT VR. PRICES WILL NEED TO COME DOWN SUBSTANTIALLY AND RELEVANT EXPERIENCES MADE MORE OBVIOUS FOR CONSUMERS TO ADOPT THIS TECHNOLOGY

VR REQUIRES CONSUMERS TO SEEK OUT THE CONTENT RELEVANT TO THEM AND THEN ENGAGE WITH IT. TO SUCCEED IN THIS NICHE SPACE, BRANDS WILL NEED TO CREATE ENGAGING CONTENT THAT ISN'T GIMMICKY

The second is product or concept testing. We've run a pilot study in the auto industry comparing the full product displays of new cars and VR simulations. We found consistency between the evaluations of the two, suggesting the auto industry has the potential to see large efficiency gains in new product testing and innovation through using VR.[16]

For market research companies, the next steps in the evolution of VR will be to create virtual platforms to simulate different environments that also allow users to interact with their environment. For instance, tracking shopping journeys, changing product packaging in real time, or transporting users to a bar to taste test a drink. In parallel to this we are likely to see a rise in augmented reality.

Finally, we have also been using 360 videos to bring our clients closer to their consumers and immerse them in their worlds. Instead of the trusty point and click PowerPoint approach, we've found that spicing things up with a few well-chosen and edited clips energises the audience and serves as a good jump-off point for debate.

All three approaches – observing, testing, wowing – will combine as the technology develops and we continue to explore this technology.

At the moment, yes VR has potential, but don't believe the hype just yet! ●

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Please look
after this
BEAR THANK
YOU.

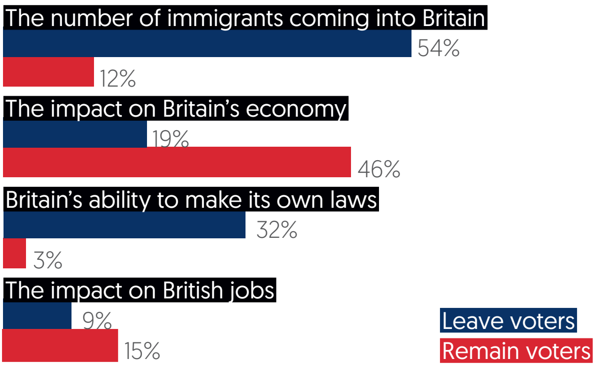
THE IMMIGRATION CONUNDRUM

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

Concern among the public about immigration has increased dramatically since the 1990s. Reaching an all-time high in September 2015, when it was mentioned by 56%, it has remained in the top three issues throughout 2016. Successive governments have failed to allay public concerns on the issue and no political party is seen to have a credible or convincing policy on how to manage the scale of immigration; the Conservatives have consistently failed to meet their net migration targets and even among UKIP supporters, only just under a half (46%) think their party completely reflects their views on immigration.

As we entered 2016, immigration was set to play centre stage in the EU referendum debate. It did. As the campaign got into full swing, concern about immigration increased sharply by ten percentage points from 38% in May to 48% just before referendum day, overtaking concerns about the economy. It was one of the key vote deciders, particularly for Leave supporters, for whom – in their own words – it was by far and away the top issue in determining their vote.

REMAIN AND LEAVE SUPPORTERS MOTIVATED BY DIFFERENT ISSUES
Looking ahead to the referendum on Britain's membership of the European Union on June 23rd, which, if any, issues do you think will be very important to you in helping you decide which way to vote? And which of these issues, if any, that you mentioned is the most important to you in helping you decide which way to vote?



Source
Ipsos MORI
Political Monitor

Base
1,592 British adults 18+, 21 – 22 June 2016

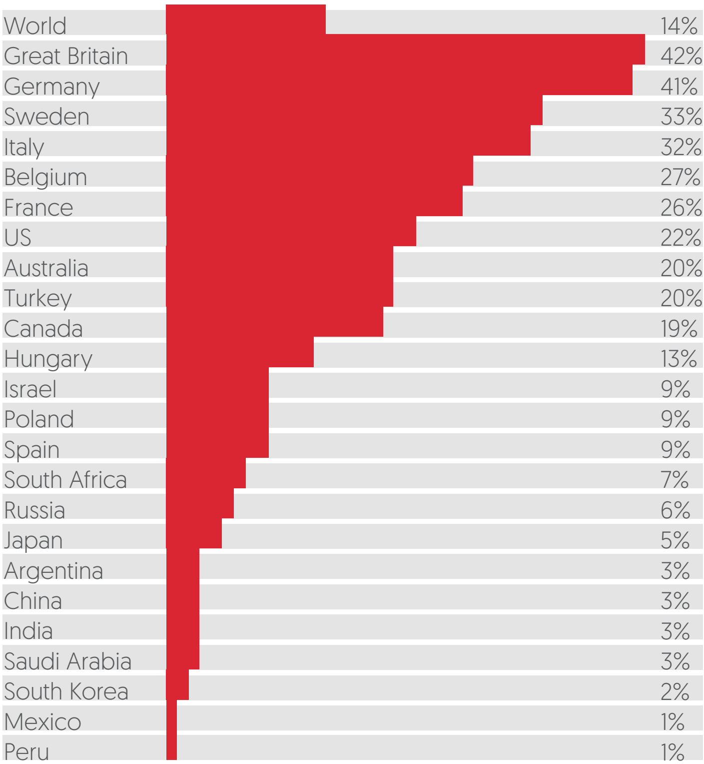
Immigration was a lightning rod issue and it has exposed a number of fractures in British society. There has been much discussion about how Brexit was a protest vote and symptomatic of widespread anti-politics[17] and that it has given currency to 'nativism', which asserts protecting the interests of native-born or established inhabitants against those of immigrants. Parallels have been drawn between the Brexit vote and the rise in popularity of Donald Trump – as Ben Page discusses elsewhere in his article on the US election, Trump's support was largely driven by anti-immigrant, nativist views.[18]

The public's concern over levels of immigration is not a uniquely British preoccupation. Our global study of 22 countries[19] this summer showed that, everywhere, people are uncomfortable with current levels of immigration. Half (49%) believe there is too much immigration in their country and 46% agree that immigration is causing their country to change in ways they don't like. In our What Worries the World study, Britons were more likely (42%) than any other country (even Turkey, a country currently struggling with an influx of Syrian refugees) to say they are worried about immigration control.

GREAT BRITAIN VS. GLOBAL IMMIGRATION CONTROL

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

% worried about immigration in each country in 2016



Source
Ipsos Global Advisor

Base
Representative sample of adults aged 16-64 in 25 participating countries. September 2016: 18,014; August 2016: 18,042.

So as Theresa May carefully navigates the 'bumps in the road' towards exiting the EU, there are high expectations of greater controls on immigration. However, there seems to be little indication of a radical shake up of controls, with the Leave campaigners' much vaunted Australian-style points based system being swiftly dismissed by the Prime Minister as soon as she took office. Despite claims made during the campaign by the Leave side, the public is split about the extent to which Brexit will actually bring down net migration; 48% think it will increase or make no difference to the number of EU migrants coming to the UK and an equal proportion (49%) thinks numbers will reduce. Given that more immigrants come from outside the EU, some realism will be important.

At the Conservative Party Conference the Home Secretary, Amber Rudd, proposed a series of potential measures to curb immigration, such as restricting numbers of overseas university students and tightening the tests that companies have to pass before recruiting employees from abroad. Businesses who rely heavily on both skilled and lower skilled migration (from inside and outside the EU) have met these proposals with disapproval. Ipsos MORI's Captains of Industry survey shows that over half (57%) of senior business figures consider the ease of visa-free recruitment of people from across the EU a significant advantage to UK business. Furthermore, evidence suggests there is actually little appetite among the general public to reduce numbers of overseas students or highly skilled workers; 70% want to see the number of overseas students to increase or stay at current levels, compared with just 24% who want to see a reduction. For the most highly-skilled workers the figures are 76% and 19% respectively. Therefore, any change in immigration control will require a careful balancing act between supporting the needs of businesses and the economy and the desire among the public to see migrant numbers reduced.
In October we found the public split between controlling immigration (39%) and securing access to the single market (45%).

Theresa May has made it very clear that reducing EU immigration is a priority in the Brexit negotiations. Therein lies the conundrum; in this era of globalisation and mass movement of people, is it possible to design an immigration system that both supports the economy and satisfies voters, or will something have to give? ●

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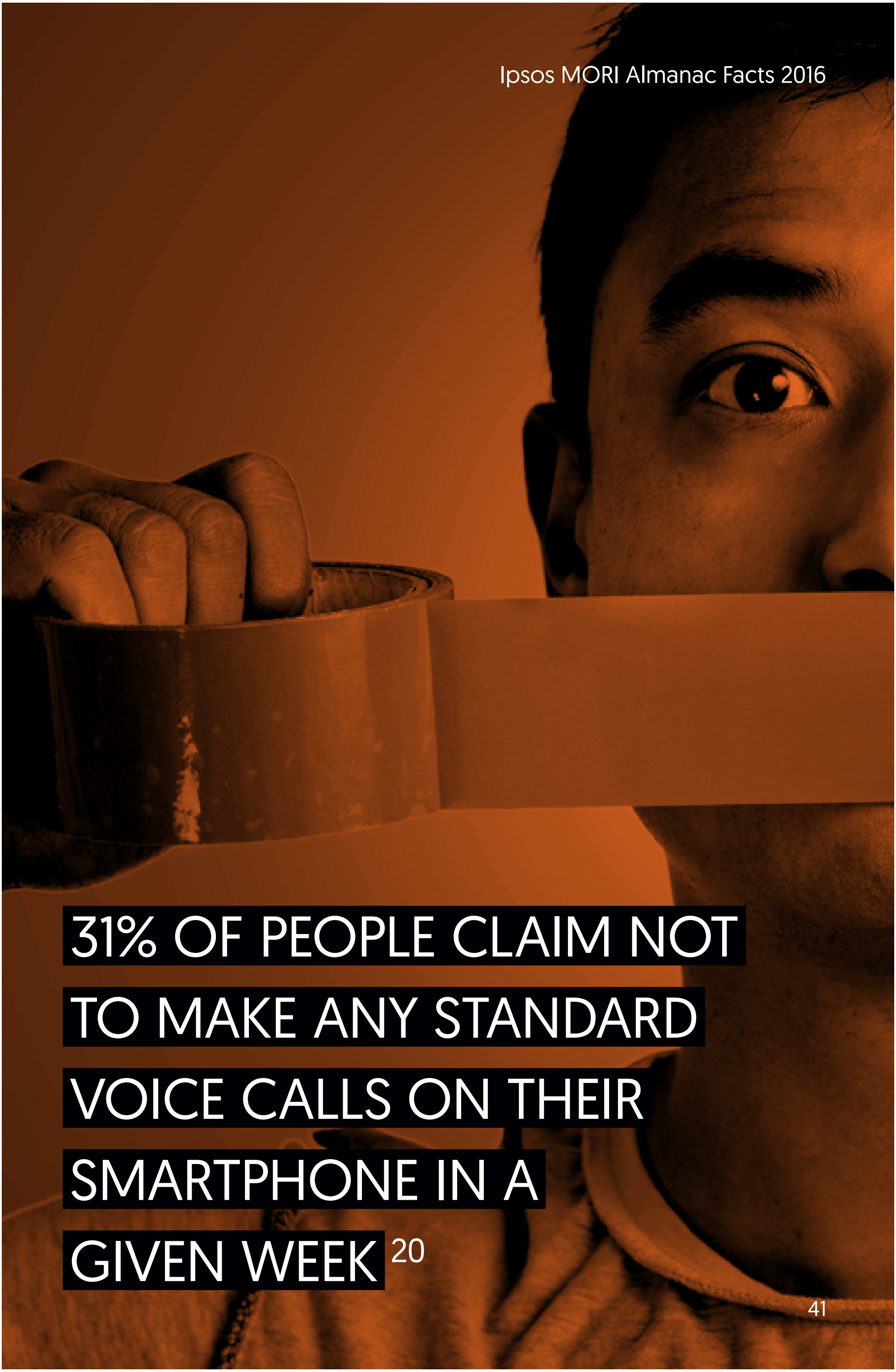
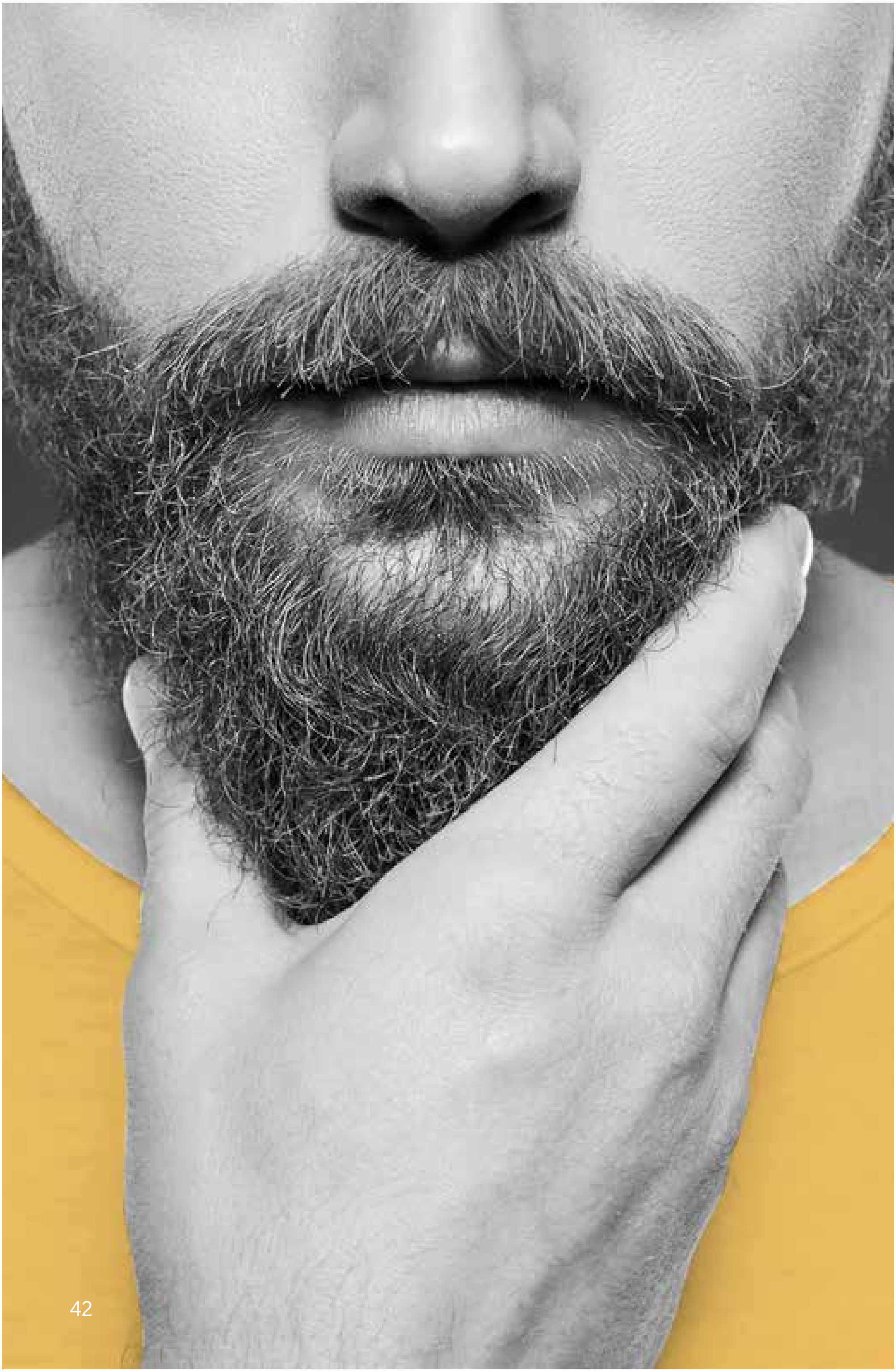


31% OF PEOPLE CLAIM NOT TO MAKE ANY STANDARD VOICE CALLS ON THEIR SMARTPHONE IN A GIVEN WEEK [20]



MILLENNIAL MYTHS – AND REALITIES

BY BOBBY DUFFY
Managing Director
Ipsos MORI Social Research Institute

One of the questions we've been asked most often over the last year by clients, journalists and commentators is "What do you have on Millennial attitudes and behaviours?"

It is completely understandable that Millennials are attracting this sort of attention. They're a big cohort of young people (usually defined as those born between 1980 and c.1995), moving towards their most economically powerful phase, whose tastes and preferences are, in many cases, still forming and will set the agenda for business for years to come.

They also still have that sheen of the new. The reality, of course, is that they're no longer all that spry, with the oldest now around 36. We've been mapping their progress for many years as part of our Generations study, and it's been hugely valuable in understanding what really is different, and what's not. While all generational boundaries are by their nature arbitrary, there definitely is something distinct about this cohort, driven mainly by the economic and technological context they've grown up in.

But they are also the most carelessly described group we've ever looked at! Myths and misunderstandings abound, with bad research jumping to general conclusions based on shallow caricatures about a group that makes up 27% of the global population.

As just one example, we can look to one of the most famous financial investment and analysis houses in the world (that we won't name here). In their widely referenced Millennials report they say: "For Millennials, wellness is a daily active pursuit ... 'healthy' doesn't mean just 'not sick'. It's a daily commitment to eating right and exercising".

Leaving aside the gross generalisation for a minute, the evidence they give for this is that the Millennials in their survey are more likely to pick out 'eating well' and 'exercising' from a predefined list of possible definitions of 'healthy', where the other options are 'not falling sick' and being the 'right weight'.

Of course Millennials will focus more on eating and exercise, because both illness and weight increase with age! What this research is measuring is a 'lifecycle effect' (related to our age or life stage), not a 'cohort effect' (something distinct about a generation that they'll take with them).

It may seem mean-spirited to pick on this research, particularly when there are a lot of similarly poor examples – but it's dangerous: this sort of blithe conclusion can lead to bad decisions.

To help see through this fug of half-facts we're producing a report on Millennial Myths and Realities, for release early in 2017.

Let's try a 'Millennial Myth or Reality' quiz based on a very small selection of the things we'll cover.

Myth or reality? Millennials are more likely to be a healthy weight than previous generations were at the same age.

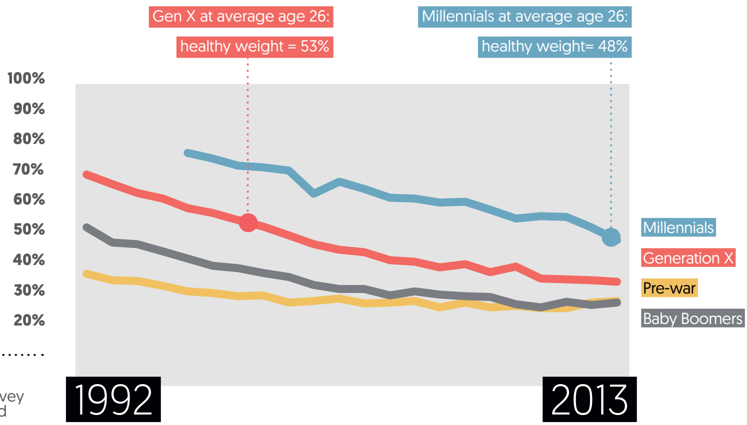
This seems credible: there is much more information about healthy eating and exercise, many more options, gyms, diet foods and support. You might also expect that the widely discussed narcissism of the current generation of young, driven by social media, could encourage a greater focus on being and looking healthy.

But, given the discussion above, you are probably not surprised that this is a myth. Our new analysis of long-term trend data shows that when they were at an average age of 26, 53% of Generation X in England were a healthy weight. It's dipped to 48% for Millennials now they've reached that same average age.

So the assertion that eating well and exercising is a 'daily active pursuit' rings a bit hollow. But you can see why a simple review of the data could lead you to the wrong conclusions. If you didn't control for age and just compared Gen X and Millennials at their current ages, Millennials would be much more likely to be a healthy

SIMPLE AGE SNAPSHOT WOULD SHOW MUCH GREATER % OF MILLENNIALS WITH HEALTHY WEIGHT – BUT NEED TO SEPARATE LIFECYCLE EFFECTS ...

% healthy weight



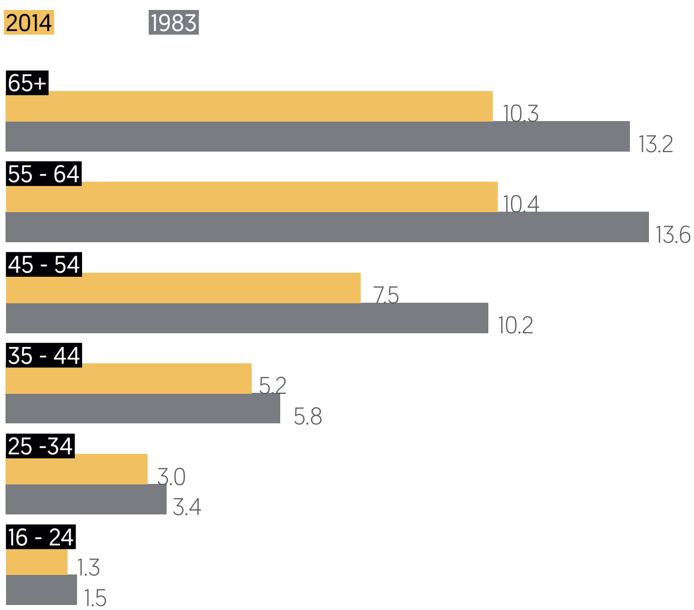
Source
Health Survey for England

weight – purely because they are younger! Gen X have given up their gaunt, interesting, Trainspotting ways and piled on the pounds, as all generations do.

The implications for business and government are clear: there are definitely sub-trends towards a greater focus on health and wellness among the young, and you can be aware of those without ascribing them to a whole generation. But the counter-trend of an 'obesity epidemic' is stronger at a generational level, with all the challenges that brings.

Myth or reality? Millennials shift jobs much more often than previous generations, either through lack of loyalty or because of the burgeoning 'gig economy'.

TENURE WITH EMPLOYER, 1983 AND 2014: USA
Median years of tenure with current employer



Source
US Bureau of Labor Statistics

This is pretty much a myth too, as the chart overleaf based on US data shows. The average job tenure of under 35s has hardly changed since 1983. In fact, over the same period, older groups have started moving jobs much more often, with average job tenures down significantly for these cohorts.

High profile discussions of gig work or McJobs for young people hide a much more important counter-trend: the economy is in a bad way, and when people get work (particularly at the start of their career), they actually try to hang on to it.

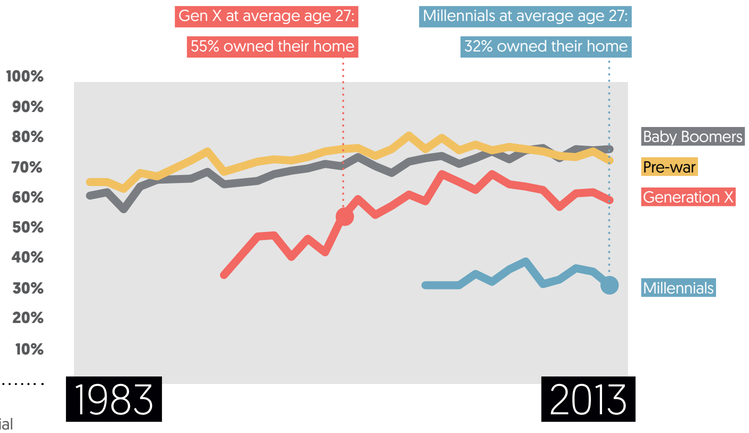
So employers beware, don't believe the hype of Millennial flightiness – if you have a retention problem in junior and middle grades, look to yourself rather than blaming disloyal Millennials.

Myth or reality? Millennials are more likely to be living at home and less likely to own their own home than previous generations.

This is emphatically a reality, with a seismic shift in household formation and tenure in the space of a generation – and it's not just a British

TENURE PATTERNS IN GREAT BRITAIN

% living independently who own their own home/paying off a mortgage



Source
British Social Attitudes Survey

disease, elements of it are also seen in the US and other countries. In the UK, when Gen X were an average age of 27 (back in 1998), 55% owned their own home – but this has plummeted to 32% for Millennials now they are the same age, and as the chart shows, it's flat-lining.

In the US, when Gen X were an average age of 27, just 18% were still living with their parents – but now 31% of US Millennials are stuck with Mom and Dad.

This has huge implications for business and government: what products people buy, what services they use, what support they need are so tied up with how they live.

Properly understanding Millennials may seem a bit old hat now: we're starting to get more usable data on Gen Z, and they are forming their own characteristics that we'll all need to react to. But Millennial power is growing, and this fascinating cohort, who saw so much change as they hit adulthood, deserves better analysis than is often seen. We hope to fill at least some of that gap in early 2017. ●

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BRITONS THINK THEIR BEST CHARACTERISTIC IS THEIR SENSE OF HUMOUR (47%),

BUT THEIR WORST CHARACTERISTIC IS DRINKING TOO MUCH[21]

DON'T LOSE YOUR VOICE: CALL CENTRES IN THE DIGITAL AGE

BY SALLY ABERNETHY
Research Executive
Ipsos Loyalty

Everyone reading this article has one thing in common – in the not-so-distant future they will phone a call centre. It is unlikely to be a joyous experience, so news from a BBC study with Oxford University and Deloitte that call centre workers will be replaced by robots by 2036 may be received with enthusiasm.

That means no more infuriating hold music, no more option menu mazes, and no more irritable agents telling us 'the computer says no'.

Soon, we'll be able to skip the human and get straight to the computer itself.

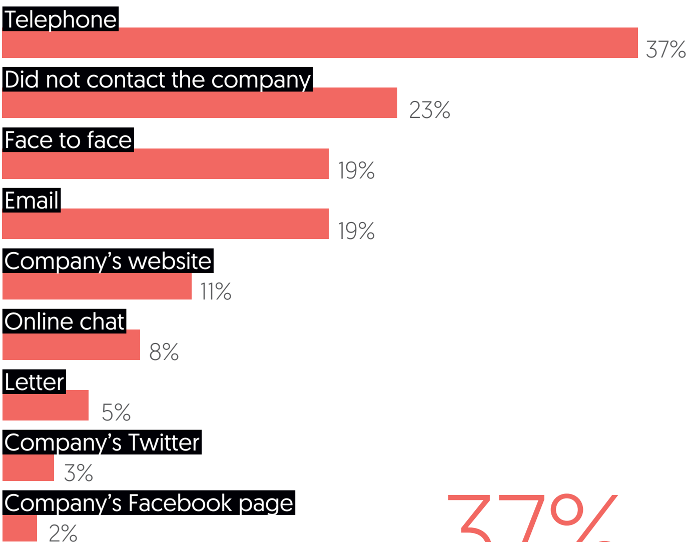
The idea sounds trivial, but it tells us something about the perception of the contact centre industry. The thinking behind the study is that professions with a perceived low degree of human interaction and empathy are most likely to be replaced by robots. But for the contact centre – an entity that exists to help people – this doesn't quite add up.

This year, many contact centre professionals have been engaged in conversations about a ‘digital transformation’. Businesses are set to roll out strategies over the next two years to achieve it. For customers, this spells a shift in how we connect with companies in the future.

Digital contact channels have grown rapidly this year. WhatsApp reached 1 billion monthly users in 2016, making it one of the fastest growing social apps. Businesses are beginning to harness the popularity and reach of apps, enticed by the potential to divert traffic away from the phone.

CHANNEL PREFERENCE AFTER A NEGATIVE INCIDENT

Through which means, if any, did you contact [COMPANY NAME] when dealing with this issue?



37%

TELEPHONE

Source
Ipsos Loyalty UK consumer tracker, 2016

Base
2,678 UK adults who experienced a negative incident with a company

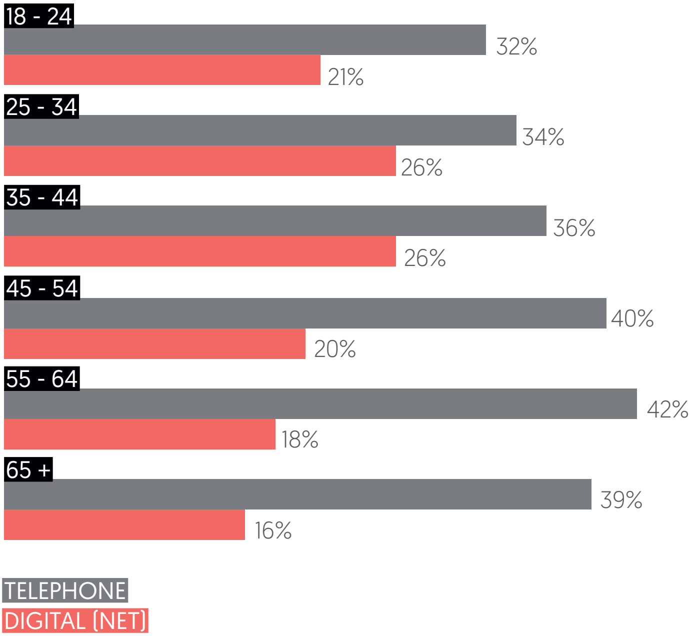
But should businesses lose their voice?

Most UK customers will complain to a company directly after a negative experience (51%). Over a third of us still prefer to call a company when there is an issue (37%), making telephone a more popular means of contact than *all* the digital channels combined.

But the gap is much narrower among younger, more digitally-inclined consumers. Businesses need to invest in digital channels to keep pace with this group. Compared to over 45s, who are twice as likely to pick up the phone than use a digital channel to contact

VOICE VS. DIGITAL BY AGE

Through which means, if any, did you contact [COMPANY NAME] when dealing with this issue?



Source
Ipsos Loyalty UK consumer tracker, 2016

Base
2,678 UK adults who experienced a negative incident with a company

an organisation, under 35s are more versatile, with digital not far behind telephone as the channel preference.

We think businesses should go about their digital transformation in terms of reducing the hassle, not the human.

Well signposted digital channels will enable customers to self-serve when they want to connect with a company quickly and easily. But this does not mean reducing the capacity of human connections. It means linking digital touchpoints with voice to create a seamless customer experience however the customer chooses to connect.

There is no point in trying to ‘digitally transform’ a business if it is not going to increase engagement or build better relations with customers in the long term.

With simple tasks automated or handled via digital channels, contact centres now have more time and capacity to do the tasks a computer cannot – those that require the human touch.

Rather than focusing on average call handling time or first time resolution, contact centres should be able to focus on delivering a better experience and bringing emotional intelligence and understanding to the operation. Without the robotic tasks, contact centre agents can take the time where it really matters – listening to and reassuring someone who has been a victim of identity fraud; talking through the process of claiming the life insurance policy of a recently deceased loved one; or sensitively resolving an issue with a faulty product.

Empowering the call centre staff to take ownership of a customer’s issue, and to demonstrate empathy when the issue is more complex, utilises their most unique and important asset; their humanness. Something robots cannot offer – for now at least! ●

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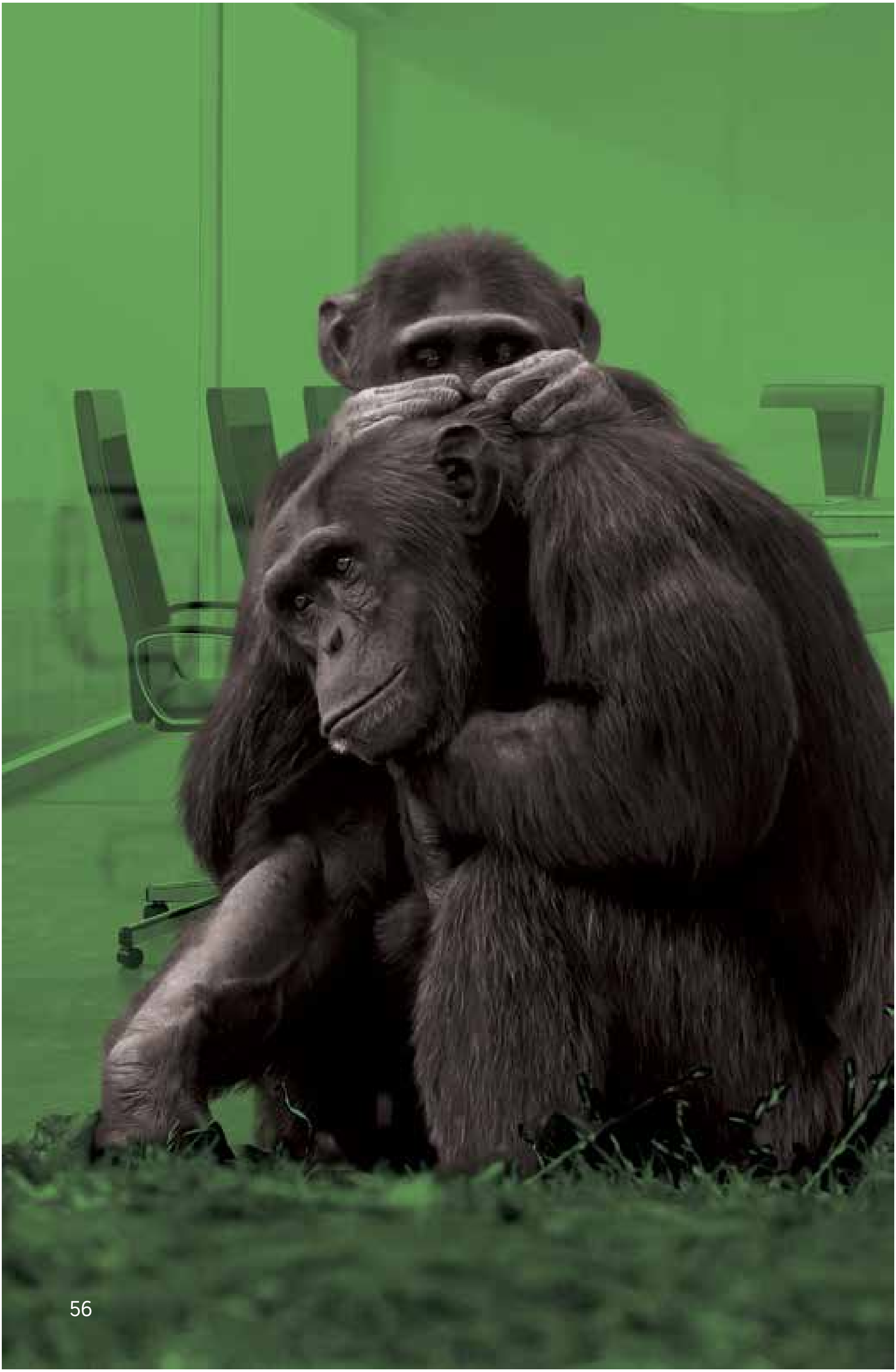
34% OF UK ADULTS CHECK THEIR PHONE IN THE MIDDLE OF THE NIGHT [22]



GROOMED TO PERFECTION? EXPECTATIONS OF MEN AND WOMEN IN 2016

BY PIPPA BAILEY
Senior Director
Ipsos Marketing

Earlier this year employment agency Portico was lambasted after it was revealed it required female employees to wear high heels to work.[23]

Social media erupted in anger at this sort of expectation being imposed on female employees in 2016 – a year which has otherwise seen so much progress for women in the workplace, including the government introducing legislation to require employers to disclose their gender pay gap,[24] and high profile examples of women leaders in politics and business.

But is the blurring of traditional gender roles in society affecting day-to-day experiences and attitudes towards appearance and personal grooming?[25] Or are women still held to a different standard than men?

Most women (77%) and men (58%) disagree with the principle of women being required to wear high heels as part of a uniform code. Portico has since abandoned a policy that was lagging far behind the curve of public opinion, where the majority take a dim

77% WOMEN 58% MEN DISAGREE WITH THE PRINCIPLE OF WOMEN BEING REQUIRED TO WEAR HIGH HEELS AS PART OF A UNIFORM CODE

view of employers policing their workers' appearance without legitimate cause. After all – as the worker involved said – there is no possible argument that a woman could do her job better in heels than in more comfortable, and equally smart, flat shoes. Looking at an equivalent measure for men, the result is similar – 58% of men and 65% of women disagree with employers banning their male staff from having a beard.

Our research found that, on a theoretical level at least, the vast majority of us [81%] believe that men and women should have equal rights and opportunities in society. However the study also suggests that, in practice, equality of the sexes does not yet extend to issues like appearance and grooming. Large majorities of both sexes [90% of women and 77% of men] think that society still puts more pressure on women to be well-groomed.

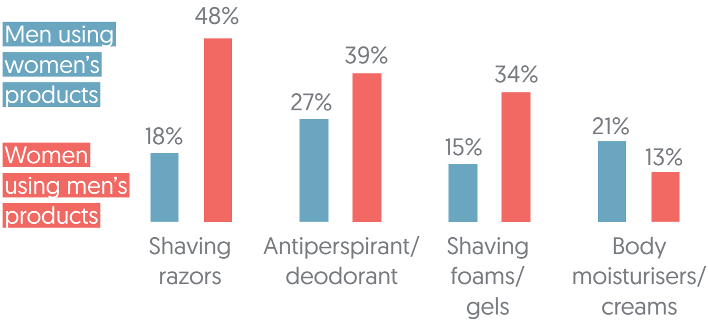
This is reflected in women's attitudes to themselves and the amount of time they spend on personal care. Women are typically harder on themselves, reporting more personal worries about their body or appearance than men on average [4.3 to men's 3.5 worries], and they use more products [10.2 to men's 6.4] and spend more time on their beauty regime – roughly ten whole days every year compared to men's eight.

Looking forward in time, it is easy to see a future where men and women's beauty regimes converge. Covergirl magazine recently announced their first 'Coverboy',[26] YouTube is full of male make-up vloggers who know how to wield a mascara wand as well as anyone, and one in five men think that in the future it will be normal or unremarkable for men to wear make-up.

Despite this, people don't see the future as a utopia of unisex products.

Both men and women use products designed for the opposite gender

Which of the following products, that were bought for female/male household members, have you ever used?



Source
Ipsos MORI

Base
442 males and 457 females who have more than one person in the household, 29 July - 2 August 2016

Even though more and more men are reaching for the concealer to cover dark circles or stubborn blemishes – YouTube vlogger Beauty Boy[27] has more than 15,000 subscribers – it doesn't look likely that they will be sharing a make-up bag with the women in their lives. The general consensus among the public is that personal care products, such as cosmetics and toiletries, will in fact be [even] more gender targeted in future.

A word of caution, though, for personal care brands; we found significant numbers of both men and women use products designed for the other gender, and primarily for reasons of convenience [who hasn't reached for a random razor in the bathroom when theirs is blunted beyond use?]. However, women are much more likely to say they've used a man's product because they think it works better. So while clearly targeted products are what consumers expect, brands need to ensure that those marketed at women are not seen as inferior to the male version. Rather than just making products pink or floral-scented, brands need to make a straight-forward, practical case for why women should choose their product. ●

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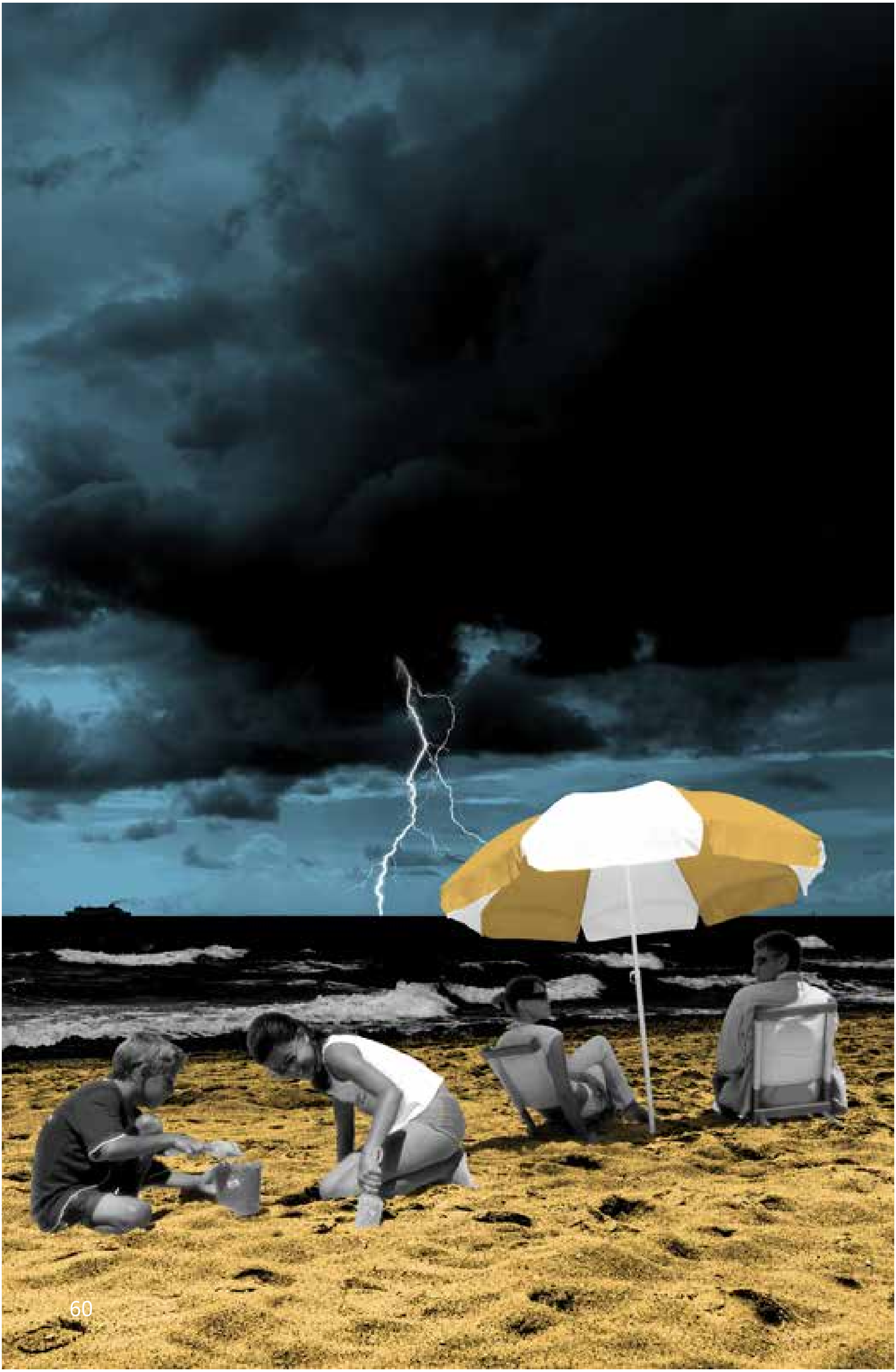

THE FEEL GOOD FACTOR

BY SIMON ATKINSON
Chief Knowledge Officer
Ipsos Knowledge Centre

Every month, the Ipsos Global Economic Pulse survey asks people around the world to tell us how they think the economy is doing in their country. No economists, analysts or any other kind of so-called experts are involved.

What do people see? Well, we can talk about the global economy and the intertwined-ness of international supply chains as much as we like. But, just as with the raw economic data, we continue to find dramatic contrasts in consumer perceptions when we look at things at a national level.

Take the 'EU5 countries', for example. In Germany, 75% describe the current economic situation in their country as 'good'. In Spain it's 16%, while in both France and Italy we can only find 13% feeling positive about things – giving a rather feeble combined three-country figure of 42.

Of course the fifth country to make up the 'EU5' is – for the moment anyway – the UK. Set against the gloom and doom of the French, Spanish and Italians, the Brits' current score of 45% looks pretty good. That said, other consumer data, including recent Ipsos MORI Economic Optimism Indexes – suggest that it's not just so-called experts who see clouds on the horizon.

If Britain has an uncertain outlook, it's worth perhaps reminding ourselves that things could be worse. For the second year running, Brazil remains slumped at the foot of the table, with just 7% giving their economy the green light. And with good reason: for much of 2016, the country has been experiencing negative annual GDP growth of more than 5%,[28] placing new burdens on the daily lives of so many of the country's 210 million strong population.[29] The worst may be over though: 59% of Brazilians expect to see their local economy become stronger over the coming months. That said, people can be even worse than economists at predicting the future. Indeed, at the end of 2016, 53% of Brazilians said the economy would improve. It didn't.

'The economy, stupid' was a phrase so successfully used during Bill Clinton's 1992 presidential campaign. However, the economy seemed a long way from the centre of this year's US presidential race. It's worth noting that American consumer sentiment has actually been improving steadily over time. As Barack Obama leaves office, 50% say the economy is in good shape; a transformation since the 29% recorded at the start of his second term four years ago.

Indeed, if we extend our look a little further back, to the start of this decade, US economic perceptions were even gloomier during Obama's first term; just 18% of Americans felt good about things in 2010. Back then – as now – we had India and China at the top of our league table, with the most striking change being that they have now been joined by Germany.

Our graphic also charts just how Britons, perhaps without realising it, have also become more positive about the state of their economy in recent years. Tune in to next year's Almanac to see how these perceptions change as 'Brexit Britain' really starts to take shape. ●

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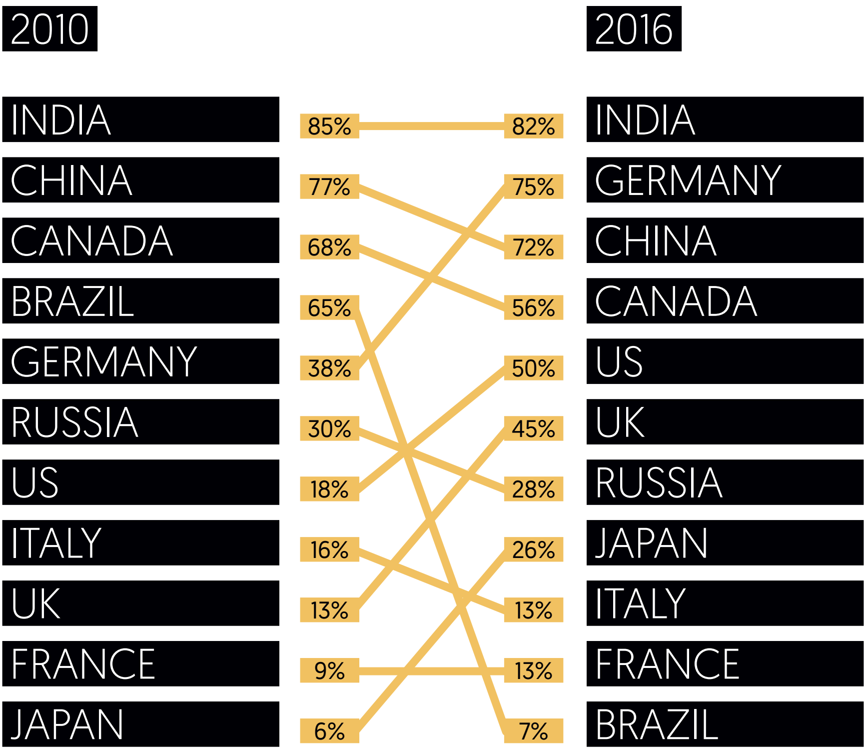
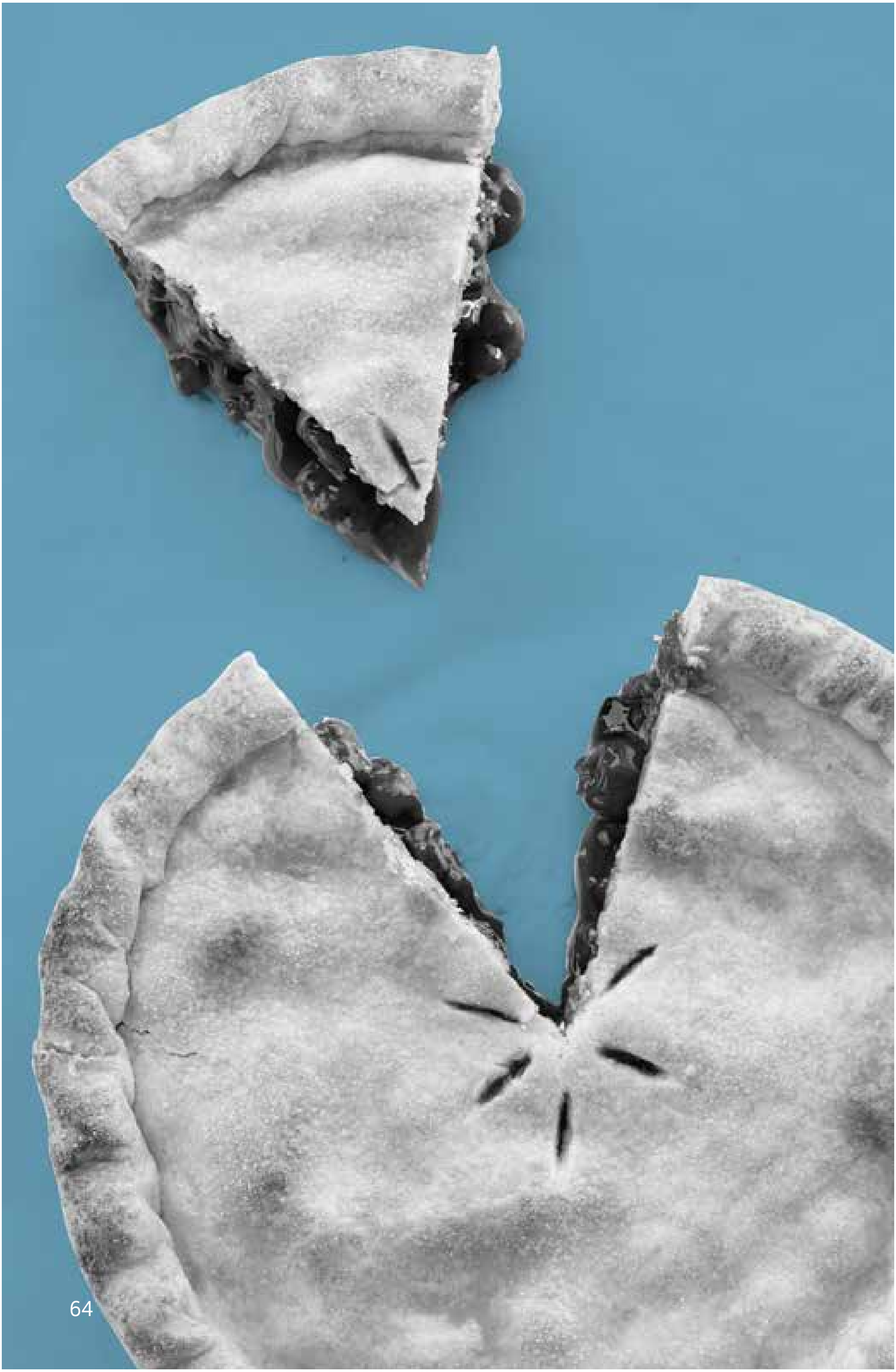
ASSESSING THE STRENGTH OF THEIR LOCAL ECONOMY

Thinking about our economic situation, how would you describe the current economic situation in ... ? (very good/somewhat good)



Source
Ipsos Global Advisor (selected countries)

Base
c. 17,500 participants aged 16-64. Monthly interviews in 24 countries around the world.



GETTING A SHARE OF THE ACTION

BY ALICE ELLEN
Senior Research Executive
Ipsos Connect

With fewer people watching traditional live television (and as a result the ad breaks between shows) and the rise of online ad blockers, brands are becoming more and more reliant on earned media – the publicity gained through reviews, reposts, likes, shares and mentions – rather than paid advertising spots. But how can you get that all-important view on YouTube, 'like' on Facebook or share on Instagram? It's not enough to just create a video with a funny cat – brands and media owners need to ensure they deliver the most impactful content and campaigns on the most suitable platform at exactly the right time to engage consumers.

To start with, understanding audiences' usage of each online platform is integral for brands and marketers. It may sound obvious, but consumers use each platform in different ways for different things. While Twitter may be used to keep up to date with news, advice and networking, Facebook is for staying in touch with friends, and Instagram is all about aspiration and inspiration. Instagram, Facebook and Twitter are not the same and brands must not treat them as such. Successful vloggers – the ones with hundreds of thousands of followers – approach each one in a very different way.

Brands also need to understand why social media users share content. The motivation behind the majority of shares is to connect with a particular individual or group, not, as may be expected, to shout something about yourself publicly.[30] This sharing is about making a personal connection and is mostly done through messaging platforms, such as WhatsApp, or if posted publically, directed to an individual or small group. Image sharing, on sites such as Snapchat and Instagram, tends to be more about seeking recognition and portraying the best side of oneself.

This is at odds with brands' motivation for sharing. Brands share content to make an impact – to gain as much attention as possible and become 'top of mind' for consumers. Consumers can be wary of this kind of behaviour – especially content that is posted directly by brands. Therefore, the best way for brands to enter social media is to get actual consumers or social influencers to share their content.

> "I WILL ONLY SHARE THIS IF I THINK IT IS SOMETHING WHICH I WANT OTHERS TO SEE. IF I THINK IT MAY NOT BE TO PEOPLE'S TASTE, I WILL NOT SHARE IT"
>
> (participant)

People share personal and branded content for very similar reasons. For example, a piece of branded content is more likely to be shared if it is of personal relevance to the user or will help them to connect with others. Motivations for sharing on social media platforms vary, because these platforms fulfil different needs for users. Brands must think carefully about what content will work on each platform in order to remain relevant. Tongue-in-cheek Paddy Power material might not be sharable on Facebook for fear of offending Grandma, but may be fine to share with mates on Snapchat or WhatsApp.

The downfall of many brands' social media strategy is that they either rehash the same content across platforms or treat each platform as if it were used in exactly the same way by everyone i.e. using Instagram to share in the moment statuses like you would do with Twitter. Successful brands alter their content, objectives and tone of voice for each channel, while ensuring they retain an overarching personality.

So, what do you need to do in order to be successful across the full range of social media channels?

1. Tailor content to fit the platform: Remember, the use of social media is constantly evolving and each platform fulfils different needs for consumers. Think platform and need state first to ensure content is always relevant and cuts through the noise of competitors.

2. Harness social media platforms in creative visual ways to effectively communicate with consumers: Tap into the ever increasing visual vocabulary trend by ensuring your images are powerful, inspiring, current and consistent in look and feel. Think both globally and locally when creating content, in order to remain culturally relevant.

3. Tone of voice can differ by platform, but brand values and personality must remain consistent and authentic: A brand's tone of voice must reflect how consumers are using the platform, but content needs to be coherent with the brand values in order for it to stay top of mind for consumers.

4. Avoid getting lost in a sea of algorithms by investing in a social media strategy and partnering with influencers: Capturing audiences' attention is only going to become more difficult across platforms. The first step is to take 'social' seriously within your business, dedicating resources to build a strong, and future-facing social media strategy. Then, if budget allows, harness the power of the influencers important to your target audience, but be sure to allow them the creative freedom to push the boundaries for your brand. ●

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A SPOONFUL OF SUGAR: HELPING PATIENTS TAKE THEIR MEDICINE

BY ELEANOR TAIT
Senior Research Executive
Ipsos Ethnography Centre of Excellence

The problem with changing behaviour is that just telling people to behave more healthily, reduce debts, recycle more or invest in a pension doesn't work, even when it's in their best interests.

Take Jack – he has type 2 diabetes. Recently it's become harder to control with pills alone, and he now injects himself with insulin once a day. Jack has always had a sweet tooth and, even now, regularly tucks into the ice cream kept in the freezer for his grandchildren's visits. Jack isn't stupid or reckless, and when his blood sugar count is high, he is frightened. So why can Jack and so many other patients like him not take the behavioural steps that would protect their health and increase their life expectancy?

The ultimate explanation for Jack's behaviour is that humans love calorie-rich food: a biological 'hangover' from a time when food was scarce, and a sweet tooth was a useful adaptive trait. This answers why Jack craves the ice cream – but why does Jack choose to eat the ice cream at the cost of worsening his diabetes? The answer may lie in behavioural science.

PEOPLE FREQUENTLY CHOOSE SHORT TERM SATISFACTION OVER LONG TERM BENEFIT

Behavioural science has at its heart cognitive and social psychology, and it helps to explain many of the foibles of human nature. One essential lesson that behavioural science has for us is that people frequently choose short term satisfaction over long term benefit. It's an intuitive but dangerously neglected human truth. It explains procrastination, it explains 'the diet starts tomorrow', and it explains why Jack chooses to eat ice cream despite knowing that it may damage his health long-term.

Of course that is a simplification. The phenomenon itself is called 'temporal discounting' and it describes how people are biased towards choosing the option which gives them the smaller reward now over the larger reward later. Given the choice, most of us would choose £100 today over £110 next month – the further in time the reward is, the lesser its incentive. For Jack, the abstract notion of a healthier 'future Jack' is hardly an incentive at all.

The solution to temporal discounting is not to berate people who eat unhealthy food, unwind on the sofa, or skip doses of their medications. Instead, the 'correct' behaviour must be a little source of instant gratification to rival that of chocolate or a lazy evening in front of the television. A winning healthy change should be camouflaged in our daily routine and should generate the same gratifying feeling as popping bubble wrap. For instance, Jack could be rewarded for healthy eating by gaining points for each 'healthy' meal he consumes via a smartphone app (even detracting points for unhealthy snacks).

This solution for incentivising healthy behaviours extends beyond healthy eating – it's applicable wherever we are faced with a choice between safeguarding our future selves and taking the easy way out in the present. From our pharmaceutical research, we know that patients often don't want to use their medicated skin creams. Using this method of behaviour change, we were able to come up with a suite of reward-based interventions which would reward patients in the moment for adhering to their creams. One such intervention was a cream formulation which generated a tingling sensation – the 'little reward' for using the medications.

Jack's case study is a useful one to bear in mind for organisations trying to bring about behaviour change – from trying to encourage diabetic patients to eat healthily to trying to get people to do their tax returns or save more for their pensions. While we know that Jack isn't stupid, he can sometimes make 'bad' decisions. When designing brands, products, communications or policies, we need to think about giving people more immediate rewards, shaping people's behaviour in a way which benefits them, but without being prescriptive. ●

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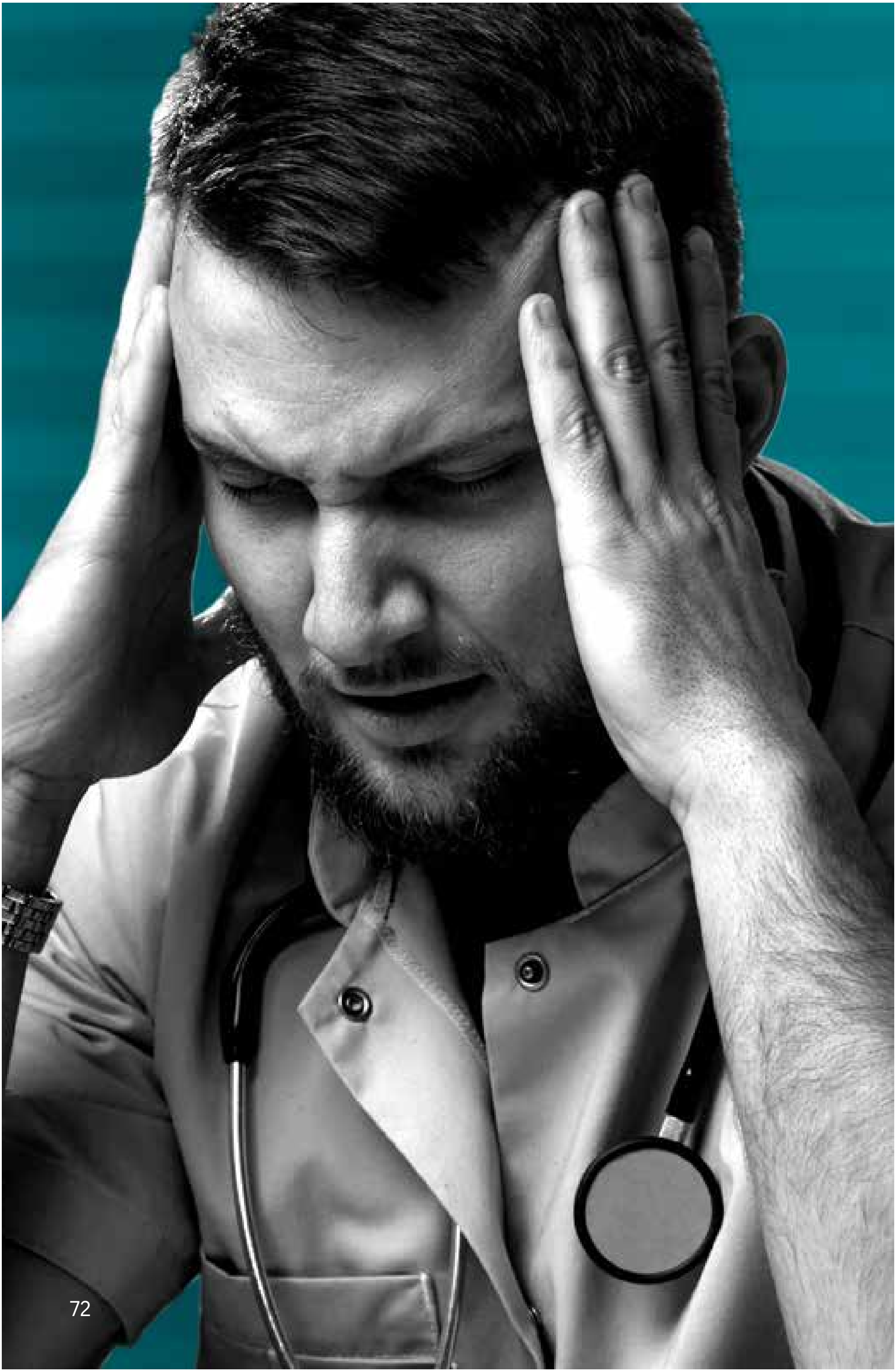


THE PUBLIC AND THE NHS: A STRAINED RELATIONSHIP

BY KATE DUXBURY
Research Director
Ipsos MORI Social Research Institute

The public still loves the NHS. It's a national institution and continues to top the list of things that make us most proud to be British (50%).

Why? It provides free care at the point of access (well, mostly), something we have that many others, like our American cousins, don't. But it's also because of our enduring reverence for the health professionals who staff our NHS.

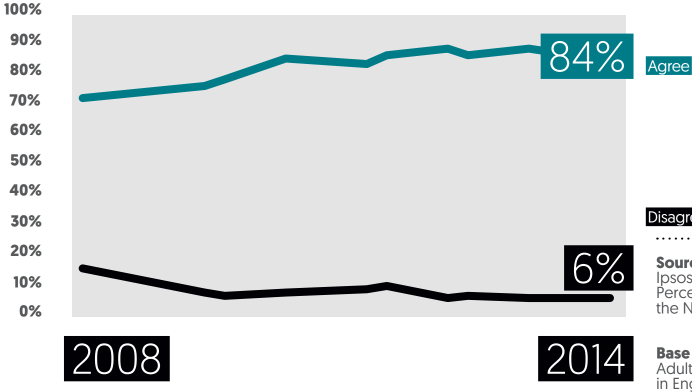
From a public point of view, doctors still top the poll of who people trust (89% of us trust doctors to tell the truth; just 21% for politicians). The GP Patient Survey tells us that 92% of patients had trust and confidence in the GP they last saw, as did 84% for the last nurse they saw.

But this relationship between the public and our health professionals is under strain, as the NHS faces its gravest challenges yet.

In some respects, the public is only too aware of the financial issues the NHS faces; 84% think the NHS will face a severe funding

THE VAST MAJORITY OF THE PUBLIC THINK THE NHS WILL FACE A SEVERE FUNDING PROBLEM IN THE FUTURE

Please tell me whether on the whole you agree or disagree with the following statement ... The NHS will face a severe funding problem in the future



Source
Ipsos MORI/DH Perceptions of the NHS Tracker

Base
Adults aged 16+ in England (c. 1,000 per wave)

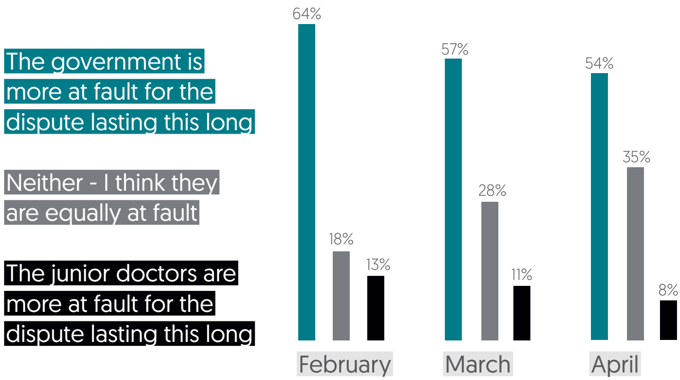
problem in the future (up from 72% in 2008). Hospital bosses and GPs might question what planet the other 16% are on, but still, rarely does a question yield a result higher than that.

The public is also very understanding of the position that health professionals find themselves in. When we talk to patients qualitatively, they tell us about overstretched nurses rushing around all day. They overlook slight lapses in care because they think nurses are under too much pressure. Indeed, understaffing and a lack of doctors and nurses is spontaneously cited as the second biggest problem facing the NHS, after a lack of resources or investment.

This reflects the experiences of health professionals on the ground – between 2013 and 2015 there has been a 50% increase in the number of vacancies for nurses and 60% for doctors. Even beyond the NHS, a shortage of nursing staff is partly to blame for dwindling numbers of nursing home beds, exacerbating the problems the NHS is having with discharging patients.

THE MAJORITY BLAME THE GOVERNMENT FOR THE JUNIOR DOCTORS DISPUTE, BUT THEY ARE INCREASINGLY BLAMING BOTH

From what you know and/or have heard about the industrial dispute between the government and junior doctors, which of the following statements, if either, comes closest in your view?



Source
Ipsos MORI

Base
Adults in England, aged 18+ (Feb: 847) (Mar: 860) (Apr: 861) 2016

In the face of these challenges, how far can the relationship between the public and health professionals stretch? It would appear it's not unconditional on either side.

Take the recent junior doctors strikes as an example. A majority of the public still supports the strikes (57% at the time of the last strike in April). However, support was down from 66% in January (partly because emergency care was affected for the first time) and the blame is starting to shift. Although 54% still blame the government for the strikes, by April, one third of the public thought doctors and the government were equally to blame (35%, up from 18% in February).

How about from the health professionals' point of view? Our qualitative research shows that GPs chose their profession partly because of the chance it offered to generate meaningful doctor-patient relationships and work in a community to improve lives.

But how does the reality live up to that? Those relationships are under pressure from workload – a workload generated to some extent by changing patient demand and the challenges of dealing with patients who have ever rising expectations. Despite widely-held fears of an NHS financial crisis, these expectations have not been dampened.

So we are heading into what may be the most challenging winter yet for the NHS. Based on past performance we have to assume that that it will be able to muddle through it. But how will relationships between the public and health professionals be affected by the end of it? If more junior doctor strikes go ahead, will the public increasingly see them as being to blame and run out of sympathy? Or will health professionals run out of patience with their demands first?

It's unlikely. Health professionals care for us when we are at our most vulnerable, giving us a particular affection for them. And they are motivated by caring for their patients. Like an infatuated couple, health professionals and the public will keep making allowances for each other. The special relationship will endure. ●

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AROUND 90% OF SHOPPERS NOW BRING THEIR OWN BAGS TO THE SUPERMARKET SINCE THE PLASTIC BAG CHARGE [31]


NO PLACE
LIKE
HOME

BY THOMAS WEEKES
Research Executive
Ipsos MORI Social Research Institute

While Brexit and immigration topped public concerns in 2016, one thing the public agrees on is that there is a housing crisis. In August, Ipsos MORI's Issues Index saw concern about housing reach its highest level since the 1970s, so perhaps it was unsurprising that party conferences and cabinet reshuffles have led to a raft of housing policy releases in September and October. The suggestion from Gavin Barwell, the government's Housing Minister, that the solution might lie in making new-build homes smaller, raises a question which we know is important to the public: what kind of housing should we be building?[32]

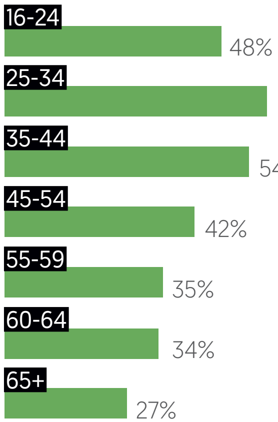
Our new research on behalf of Shelter gets to the heart of this issue.[33] In 2016 we used in-depth research to ask the public to help to define a 'Living Home Standard' for all people in Britain, generating a list of 39 attributes within five domains; Affordability, Decent Conditions, Space, Stability and Neighbourhood.

We then put British homes to the test against this new standard. The results were alarming. Our survey revealed that 43% of householders fail the Home Standard, with key differences emerging by region, tenure and age group – affordability being a key problem.

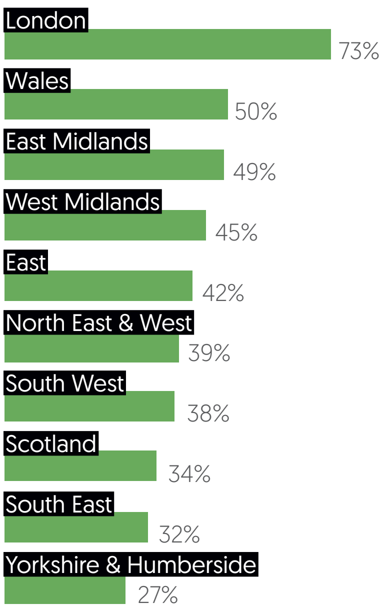
Discussions about the housing crisis rarely fail to mention young, private renters, and those living in London. The new standard highlights the difficulties that these groups are facing – 34% of London homes fail the affordability domain *and* another domain, compared to 13.7% nationwide. Private renters, who this year outstrip buyers for the first time,[34] are the worst hit; they are more than four times more likely to fail affordability and another domain compared to those who own their home (28% vs. 6%). This group is not only paying through the roof for their housing, they are also paying for housing that is sub-standard in some way.

PERCENTAGE OF PEOPLE IN BRITAIN WHOSE HOMES FAIL THE HOME STANDARD

YOUNGER GROUPS LIVE IN HOUSING THAT IS MOST LIKELY TO FAIL THE HOME STANDARD



LONDONERS' HOMES ARE MORE LIKELY TO FAIL THE STANDARD, BUT OTHER ISSUES EXIST IN WALES AND THE MIDLANDS



Source
Shelter / Ipsos MORI

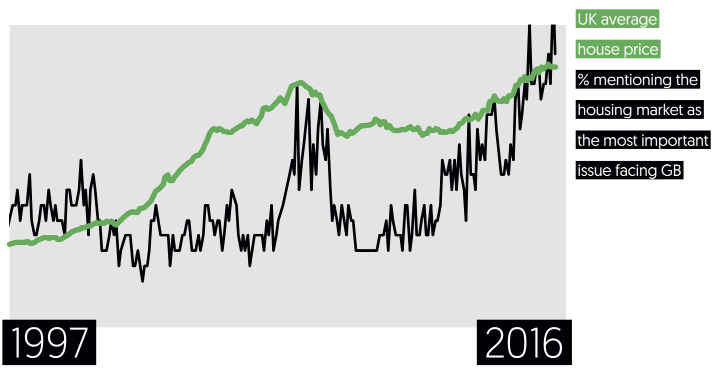
Base
Each group has minimum of 100 GB adults 16+ 19 August - 5 September 2016

But it is not just young Londoners struggling with housing issues. Squeezed-middle parents, regional issues in Wales and the Midlands, and a stark urban-rural divide were features of the housing crisis highlighted in this report, though they often fail to achieve the same level of media coverage.

On the face of it, Gavin Barwell's focus on expanding the affordable home market, and Sadiq Khan's promise for a London Living Rent make sense.[35] Twenty-seven per cent of homes fail the affordability dimension of the Standard, with 14% failing solely because housing costs are too high. This has an impact on the day-to-day lives of house-holders: they may be unable to save, have to cut back on social activities, or struggle to meet costs for everyday items like food and heating. It is no wonder that concern about housing is so closely linked to shifts in house prices.

However, while these findings tend to support the dominant narrative of housing as an affordability crisis, our findings suggest that the story isn't quite that straightforward. Indeed, we know from research we've previously undertaken that, while

CONCERN WITH HOUSING
IS CORRELATED TO PRICE



6% – March 1997
£68K – March 1997

18% – July 2016
£214K – Sept 2016

Source
Ipsos MORI Issues Index / Halifax House Price Index

Base
c.1,000 British adults age 18+ each month

"[HOME MEANS] SECURITY, AS IN THE SENSE OF NOT BEING IN FEAR OF LOSING YOUR HOME"

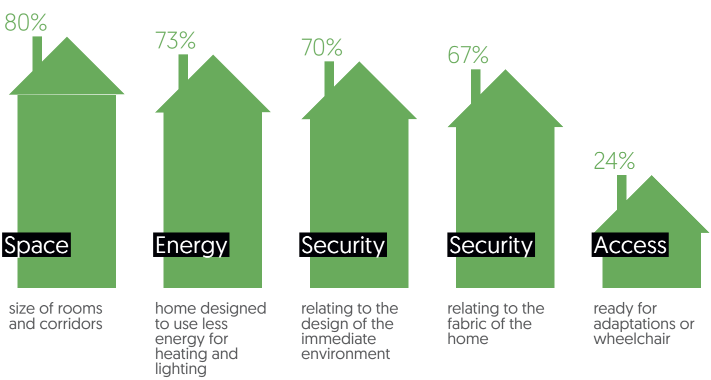
(Discussion group, London)

affordability is central to the public's perceptions of housing in the UK, quality, energy efficiency and the area surrounding homes are also important.[36]

Our research on behalf of Shelter found the public adamant that a house is a 'home' not just somewhere to sleep. Participants spoke

WHEN THINKING ABOUT RENTING OR BUYING A HOUSE, THE PUBLIC WOULD PREFER HOMES THAT MEET MINIMUM STANDARDS RELATING TO SPACE, ENERGY EFFICIENCY, AND SECURITY

% saying 'I'd be more likely to choose a home that meets this type of standard'



Source
RIBA / Ipsos MORI

Base
702 GB adults aged 16+ 25 February - 1 March 2013

“[HOME MEANS] PEACE OF MIND, AWAY FROM EVERYTHING, ON MY OWN, AWAY FROM PROBLEMS OF NOISE, AWAY FROM WORK AND CONFUSIONS”

(Discussion group, Glasgow)

about the lived experiences of their home; of fears of mould damaging their children’s health, how they felt about closing the front door and shutting out the outside world, and how a lack of security of tenure impacts on their lives.

So what does this mean for housing policy in 2017 and beyond? Despite media reports of a slump in foreign investors buying luxury properties,[37] in most parts of the country the housing crisis continues unabated, with Brexit showing relatively little impact at this early stage. Regardless of the impact Brexit has on affordability, the Home Standard tells us that the public are unwilling to compromise on the elements that make a property feel like home. We want space to share with friends and family, to be confident we can stay in a property long enough to build links to the local community, and to be able to live close enough to friends, work, and amenities. While the government has a lot to contend with over the next two years in particular, they, in partnership with developers and planners, would do well to remember that smaller houses might be more affordable, but they won’t necessarily make the house a home. ●

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CELEBRITY DEATHS, HUNGRY LIONS AND PATTERNICITY

BY COLIN STRONG
Head of Behavioural Science
Ipsos

For many people, the beginning of 2016 was marked by David Bowie's untimely death. Whilst this in itself was sad, the nation's mood was again rocked by the death of actor Alan Rickman, also in January and of the singer Prince in April. These three deaths drew many headlines asking if 2016 was the worst year ever for celebrity deaths.

Whilst we clearly mourn the passing of these three eminent, highly talented individuals, what was it about them that caused such an outpouring of sombre reflection? There have been plenty of other celebrity deaths in 2016 including Caroline Aherne, Victoria Wood, Muhammad Ali, Ronnie Corbett, Gene Wilder and Leonard Cohen. Yet somehow the same tone of astonishment of the timing of the deaths was not reflected in our national psyche, or perhaps more accurately, the media.

One reason for this is due to the way in which we as humans are programmed to identify patterns in the world around us. We need to be able to quickly and easily make sense of our environment if we are to be able to operate in it without agonising over every

THE FIRST CASE OF SOMETHING HAPPENING IS TYPICALLY THOUGHT OF AS CHANCE, WHILST THE SECOND CASE CAN BE CONSIDERED A COINCIDENCE. BUT THE THIRD INSTANCE IS THE LOWEST POINT AT WHICH WE CAN CONSIDER THERE TO BE A PATTERN

decision. Some have even claimed[38] that there is an evolutionary advantage in this – if our forebears mistook a rustling in the grass as the noise made by a prowling lion then there is little downside to erring on the cautious side. Those who weren't alert didn't live long enough to have children.

The number three is relevant to this because it is the lowest figure that can be used to form patterns in our mind. The first case of something happening is typically thought of as chance, whilst the second case can be considered a coincidence. But the third instance is the lowest point at which we can consider there to be a pattern, and as such our minds pounce on it. Just as at school we are taught that the way to draw a parallel line is to use three measurements not two (as with the latter we can easily make a mistake).

As such, the number three looms large in our culture, storytelling, religion and speech. Think three musketeers; the three amigos; the three wise men; red white and blue; three blind mice; heaven, earth and hell; three little pigs; the Father, the Son and the Holy Ghost; veni, vidi, vici. I could go on. There is plenty of evidence that this is not merely a Western phenomenon. Chinese tradition considers three a lucky number, with numerous proverbs extolling its virtue. For example, Confucius said: 'Three people are walking together; at least one of them is good enough to be my teacher.'

The wider point here is that we humans love patterns. Whilst our inclination for 'patternicity' clearly has advantages, particularly when avoiding hungry lions, perhaps there are downsides. When looking at a truly random sequence we tend to think there are patterns in the data because it somehow looks too ordered or 'lumpy'. Psychologist Thomas Gilovich[39] points out that when we throw a coin twenty times there is a 50% chance of getting four heads in a row, a 25% chance of five in a row, and a 10% chance of a run of six. But if you give this sequence to most individuals they will consider that these are patterns in the data and not at all random. This explains the 'hot hand' fallacy in which we think we are on a winning streak – in whatever that may be, from cards to basketball to football. In each of these areas, where the data is random but happens to include a sequence, we massively over-interpret the importance of this pattern.

Our inclination to seek out patterns in data perhaps explains why we view certain numbers, such as three, as having particular significance for us. Indeed, there is a whole belief system of numerology[40] where a divine relationship is considered to exist between a number and coinciding events. But for the more scientifically-minded amongst us, our willingness to imbue three celebrity deaths with significance is perhaps a function of our very human tendencies, rather than a form of celestial significance.

Understanding the way our brain works in spotting patterns is of course more important than ever as we try and make sense of the ever growing array of data available to us about consumer behaviour. Pattern spotting is a great skill but our human pitfalls need to be understood and corrected if we are to be able to pull out signals from the huge amount of noise that we need to process in order to make effective decisions. ●

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TAKING BACK CONTROL

BY ADAM ISAACSON
Research Director
Ipsos Connect

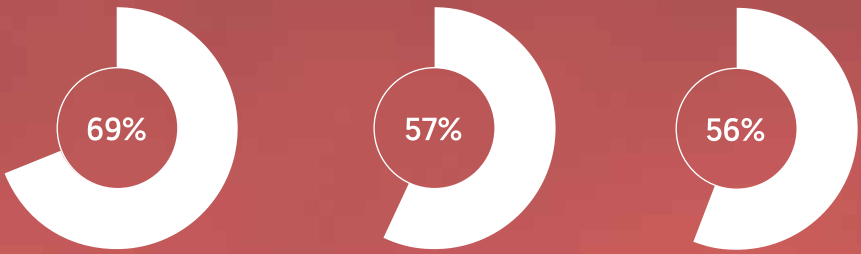
The growth in popularity of ad blocking software is causing sleepless nights among online publishers. But, as they toss and turn at night, they should take comfort that we do appreciate being directed to content that is relevant to us at that moment in time. Therein lies a potential resolution that could benefit both the advertisers and the consumers.

Imagine being able to select the types of ads you are shown so that you only see those you are interested in. You could, for instance, decide you only want to see ads about sports, fashion or culture.

Could this be a 'win-win' for the industry, by encouraging us to stop using ad blockers, and by giving us an engaging and useful advertising experience based on the things we like to see and do? We know people are prepared to turn ad blockers off under the right circumstances and it could be that giving users more control over the ads they see would ensure advertising engages with the intended audience and ad blocking usage slows (and eventually declines).

PEOPLE USE AD BLOCKERS FOR A NUMBER OF REASONS
You said that you have used ad blockers to block advertising on websites/apps. Which, if any, of the following reasons explain why you do?

ARE ANNOYING | GET IN THE WAY | ARE IRRELEVANT



Source
Ipsos MORI

Base
662 GB Adults aged 16-75, online April 2016

CONSUMERS ARE ACUTELY AWARE OF WHEN ONLINE TARGETING GOES FROM ‘COOL’ TO ‘CREEPY’

However, online publishers would do well to remember that there is such a thing as too much personalisation. Consumers are acutely aware of when online targeting goes from ‘cool’ to ‘creepy’.

While people want a personalised online experience, they dislike ads that are disruptive, however personalised they may be. The most common reason for blocking ads is because they are annoying (69%), followed by “getting in the way of what I’m trying to do” (57%) and “irrelevant” (56%).

Across ages and geographies, consumers tell us they want more control over ads online, and agree that increased control will improve their online experience. For instance, eight in ten people (79%) agree that they should be able to opt out of seeing ads on specific topics (e.g. Football or Politics) if they want to. Providing additional controls to people can be a way of providing them with a positive, personalised experience, whilst also building trust.

Some social media platforms have recently introduced tools to help people control their experience, improved how ads are shown, and created new ad formats that complement, rather than detract from, people’s experience online. These changes were based on insight that demonstrated the importance of needing ad controls.

These new controls mean that users can easily block the ads they truly dislike – gambling and dating ads top the list – without the need to block every ad.

One challenge in helping us see only what we are interested in is that some publishers and advertisers do already offer limited ad personalisation options, but, most of us are unaware of them! Given that 74% of Britons who say they are willing to pay for a product or service that keeps their details private have not increased the privacy settings on their internet browser,[41] it begs the question of whether they are likely to take the time to set ad preferences.

“Take back control” was THE slogan of 2016. In advertising, as in politics, that is what publishers and advertisers need to give us. ●

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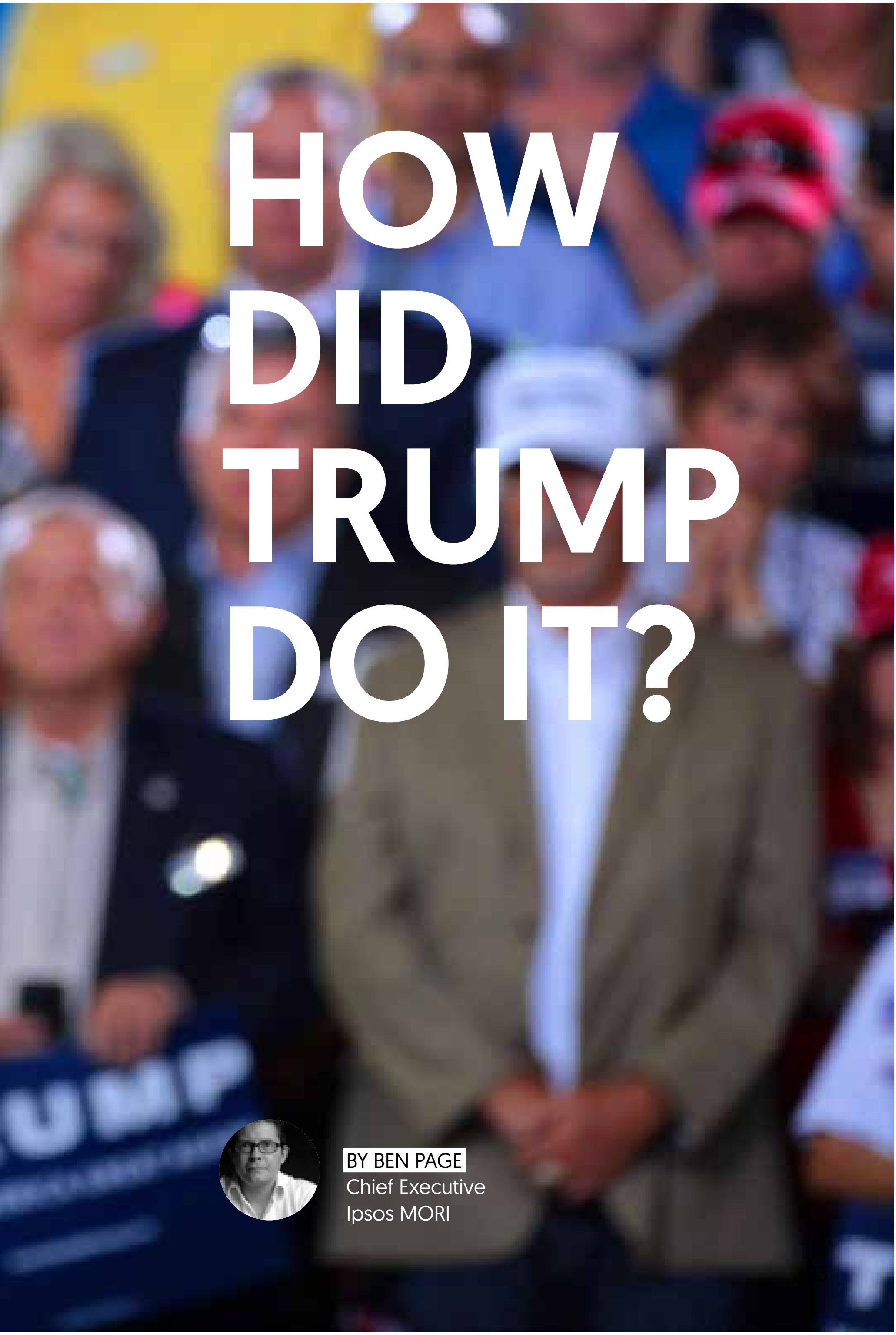

HOW DID TRUMP DO IT?

BY BEN PAGE
Chief Executive
Ipsos MORI

TRUMP'S SUPPORTERS SAW ALL THE ILLS OF THE WORLD THROUGH THE PRISM OF IMMIGRATION, AND ITS PERCEIVED NEGATIVE IMPACT ON THEIR LIVES

Despite Hilary Clinton getting more votes than Donald Trump (about 1-2% more, close to the three-point lead predicted by pollsters) she failed to win the Electoral College votes needed to secure the presidency (not predicted by pollsters).

But how did this shock election come about? What is it about Trump and his campaign that managed to transform a relatively disliked property developer and reality television star into the 'leader of the free world'?

Back in September Clifford Young, who leads our political research in the US, conducted an in-depth analysis of the drivers of public support for Trump.[42] It showed Trump's support was nativist, anti-immigrant and 'America first' in nature. Trump's supporters saw all the ills of the world through the prism of immigration, and its perceived negative impact on their lives. Trump, in turn, offered himself as a solution to this problem – promising to build a wall along the border with Mexico, deport illegal immigrants, put the US Muslim population on a register and bring manufacturing jobs back to America.

Of course, this nativism trend is not new, or confined to the United States. Our research shows this anti-immigrant rhetoric is partly just a symptom of a more profound problem – long-term stagnation in real wages, blamed on globalisation and migration (technology may also have a hand in it for industrial jobs). Only 37% of Americans believe that globalisation is good for their country,[43] and there is no country on earth that believes immigration is good for them. From this perspective, Trump, Brexit and the rise of insurgent, right-wing parties in Western Europe can all be understood in economic terms – immigrants are perceived as the cause of long-term economic uncertainty.

Nativism is certainly not the only driver of support for Trump. The belief that 'the system' is broken was important as well. During his campaign Trump said American cities, the healthcare system, the Republican party, schools and even the election itself were all broken, rigged or disastrous,[44] and offered himself, of course, as the only solution to fix them.

The idea of a broken system resonates with many small town Americans who feel shut-out of the American Dream – the system has failed, and has failed them. While a lack of experience in public office might have been considered a hindrance, in this case Trump played it as an advantage – he was not tainted by the cronyism and corruption he claimed were endemic in the nation's capital. Instead he promised to "drain the Washington swamp" – proposing a five-year ban on officials who leave the White House or Congress and wish to become lobbyists, a "lifetime ban" on executive officials lobbying for foreign governments, and a "complete ban" on foreign lobbyists who wish to fundraise in US elections.

Apart from Trump's appeal, there was also Clinton's failure. Perceived as the product of the elite, she failed to connect with

HE WAS NOT TAINTED BY THE CRONYISM AND CORRUPTION HE CLAIMED WERE ENDEMIC IN THE NATION'S CAPITAL

ACCURATELY PREDICTING TURNOUT IS PROVING TO BE ONE OF THE MOST CHALLENGING ASPECTS OF POLITICAL POLLING TODAY

core Democrat voters, many of whom simply didn't bother voting at all, compared to 2012 or 2008. Her position as part of a political dynasty was perceived as 'more of the same' for those who hadn't seen their conditions improve.

The lower than average turnout in key swing states such as Michigan, Wisconsin, Pennsylvania and the 'rust belt' Midwestern states also helped Trump. These areas were all hard-hit by the recession and have not experienced the green shoots of recovery experienced in urban areas. Historically, low turnout has favoured the Republican party, and it did in 2016. At the time of writing, votes were still being counted, but turnout appeared to be down by 2-4 million votes on 2012. As with Brexit, discussed elsewhere in this year's Almanac, accurately predicting turnout is proving to be one of the most challenging aspects of political polling today – particularly when behaviour changes radically from one election to another.

In his victory speech at the Hilton Midtown in New York, Trump pledged to be the "president for all Americans". It seems he has a tough battle ahead of him – the vocal protests around the country in the wake of his victory are evidence that many Americans do not view him as their Commander in Chief. The road may not be much smoother among his supporters – having rode to victory on outlandish promises to fix the system and "make America great again", President-elect Trump now needs to deliver. ●

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EIGHT IN TEN BRITONS HAVE AN UNFAVOURABLE OPINION OF DONALD TRUMP[45]


£20
Google

BANK TO THE FUTURE

BY CALLUM WATLING
Research Executive
Ipsos Loyalty

As I write this article I'm viewing an advert for Echo, Amazon's smart speaker for the home of tomorrow. Google has just announced a rival device that will allow users to perform tasks from streaming music, through to controlling their thermostat just by talking to it. If the tech companies' promises are to be believed, then 2017 heralds a future of unprecedented simplicity for our domestic lives, as interconnected devices begin to combine with Artificial Intelligence (AI) in the home.

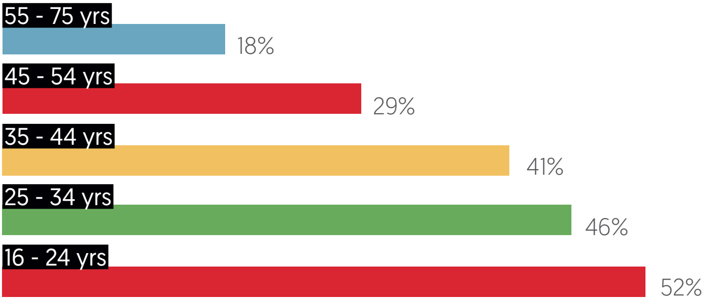
The future for retail banking also looks set to be in AI, with 2017 the year when it really starts to take off. In its most recent inquiry into the sector,[46] the Competition and Markets Authority (CMA) clearly recognised the importance of technology as a driver for change in how we will be banking – by requiring an Open API standard by early 2018.

What could an Open Banking API do? A third-party service provider could, for example, gather all your personal information from a variety of sources (such as your current accounts, savings accounts, credit cards, mortgages, insurance policies, utility bills

REAL APPETITE EXISTS NOW

There may soon be mobile apps available ... designed to help you manage your personal money and spending ... if such an app were available, how likely or unlikely would you be to use it?

[% very/fairly likely]



Source
Ipsos MORI

Base
1,119; UK adults 16-75, online; 8-12 April 2016, data weighted

or even social media and shopping behaviour) and put all of this information into a single user-friendly app. When we presented UK consumers with the idea of such an app, 35% said they would be likely to use it, increasing to 52% for 16-24 year-olds. There is a real appetite for services which can help consumers better understand and access their own financial data.

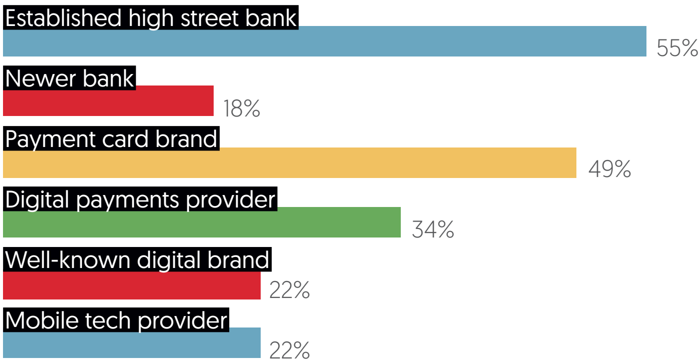
This is only the first step to a broader personal information economy. Some predict that an open banking API will eventually combine with the Artificial Intelligence of the likes of Amazon Echo and Google Home, allowing algorithms to assist in personal financial decision-making, switching accounts or utility providers automatically, so that consumers get the best deals at particular moments in time. Imagine knowing that each purchase you make while on holiday will get the best currency exchange rate based on that specific moment in time – something which will matter even more if the value of sterling continues to fluctuate.

Banks and insurers are preparing themselves with fintech partnerships, incubators and accelerators, with over a third of

WHO WOULD YOU TRUST TO PROVIDE THE APP?

How trustworthy would you find each of the following types of organisation as a provider of a mobile app to manage your everyday finances?

[% trustworthy]



Source
Ipsos MORI

Base
1,124; UK adults 16-75, online; 8-12 April 2016, data weighted

UK consumers trusting the likes of Amazon to provide an app to manage their everyday finances and 35% seeing a future in which their main bank account provider has no physical branches. Such a change would disrupt the relationship between leading financial services providers and their customers, effectively relegating established banks to the role of providing a utility.

EX-BARCLAYS CEO ANTONY JENKINS IS EVEN MORE SANGUINE, SEEING A FUTURE WHERE BANKS VANISH ENTIRELY AS THEY ARE REPLACED BY ‘DISTRIBUTED LEDGER’ TECHNOLOGY

Ex-Barclays CEO Antony Jenkins is even more sanguine, seeing a future where banks vanish entirely as they are replaced by 'distributed ledger' technology. In this world, retail banking may move away entirely from a model where financial data is created, controlled and shared by banks, towards one where the data itself is created, distributed and edited publicly over the internet. While Mr Jenkins clearly has a personal interest in this view of the future – he now heads up his own fintech venture – the financial sector clearly has plenty to be wary of in the coming years.

With more than 600 bank branch closures in 2016, and more planned for the coming years,[47] bank bosses are painfully aware that the future of banking does not lie in bricks and mortar. ●

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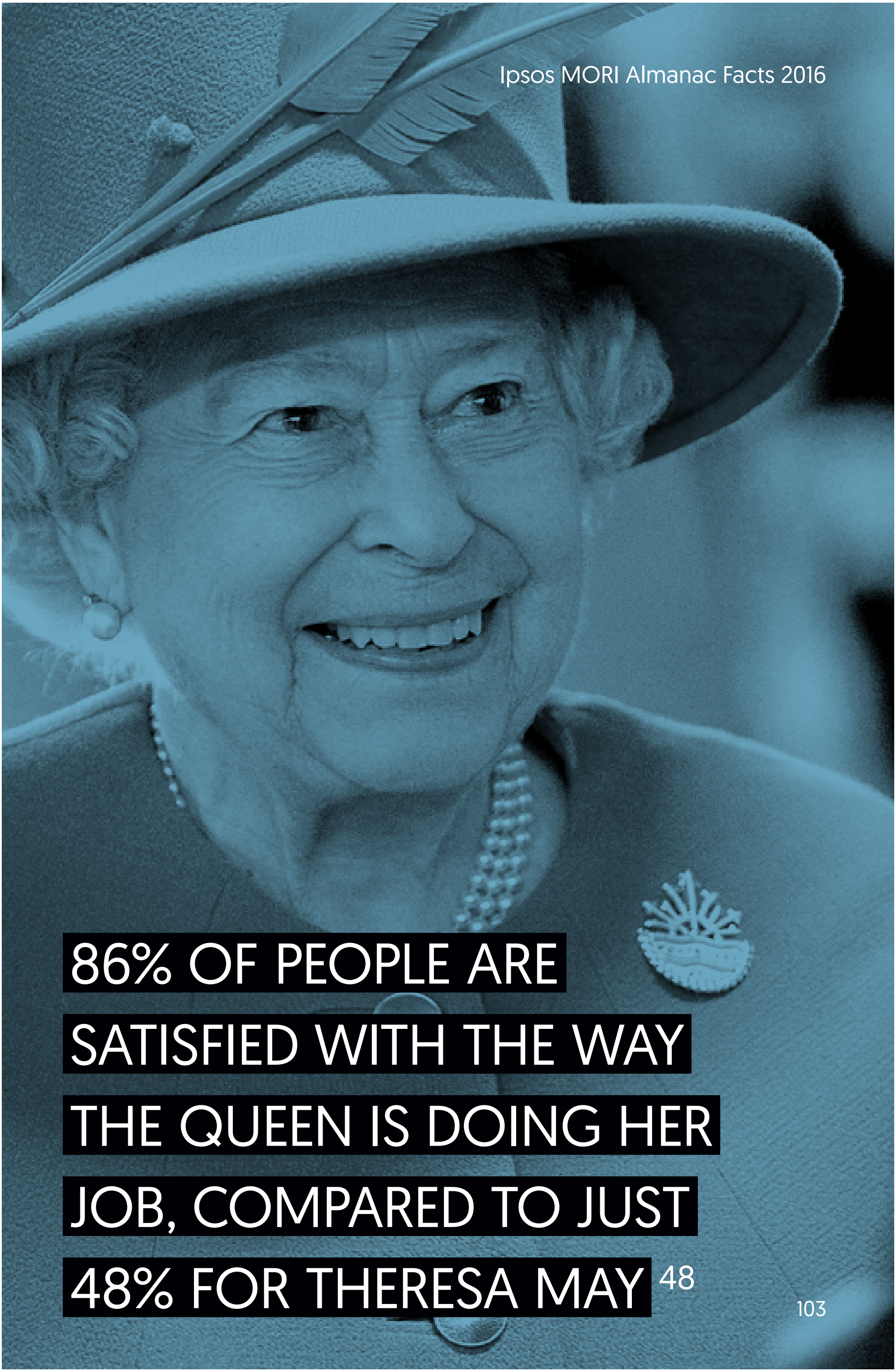
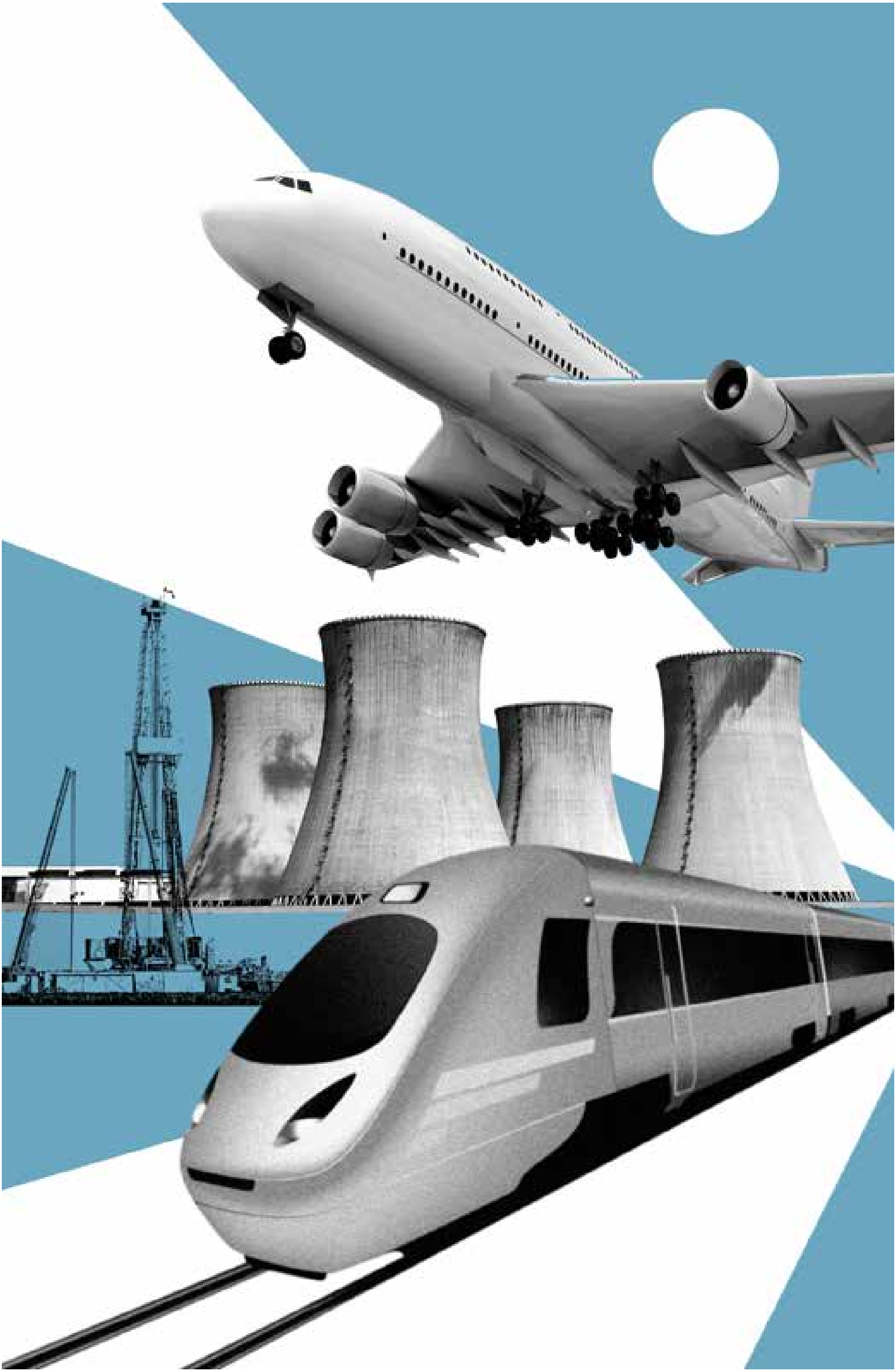


86% OF PEOPLE ARE SATISFIED WITH THE WAY THE QUEEN IS DOING HER JOB, COMPARED TO JUST 48% FOR THERESA MAY[48]



BUILDING BRITAIN: THE INFRASTRUCTURE IMPERATIVE

BY BEN MARSHALL
Research Director
Ipsos MORI Social Research Institute

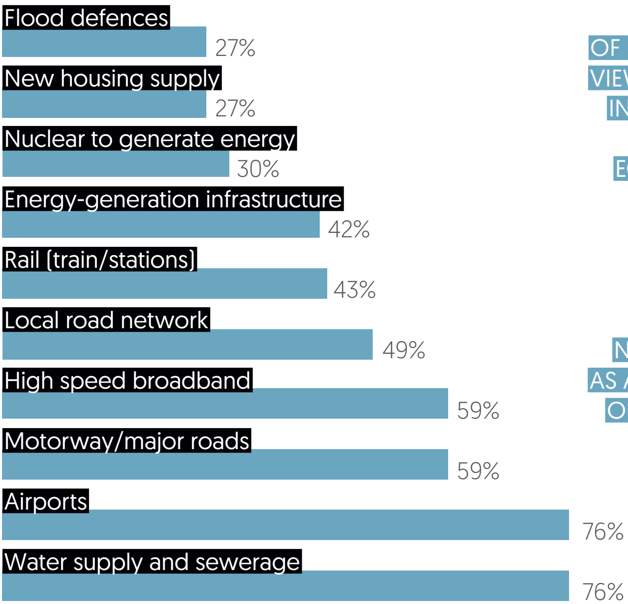
Hinkley Point, HS2, Heathrow and fracking at Little Plumpton! The government's in-tray includes some big decisions about big-budget projects. Thinking in Whitehall is apparently edging towards borrowing to build and a more pragmatic, civic-minded approach to infrastructure; more about jam today (or at least not decades hence), balancing the needs of consumers and citizens.[49]

The changes in emphasis and rhetoric have followed a Brexit vote which brought into sharp focus the need for government to stimulate national and local economies in efficient, equitable ways. Laying track, building runways, upgrading our roads and energy sources, can all help. But if we build it, will they come? How should we do it? And will it be worth the effort and money?

With these questions in mind, Ipsos MORI surveyed Britain and 25 other countries, asking the public in each how they rated infrastructure, as well as gauging their priorities for improvement and attitudes towards delivery.

WHAT INFRASTRUCTURE IS GOOD ENOUGH?

Please indicate how good or poor you rate the current quality of each one in GB ... (% very/fairly good)



76%

OF BRITONS ARE OF THE VIEW THAT INVESTMENT IN INFRASTRUCTURE IS VITAL TO FUTURE ECONOMIC GROWTH

60%

AGREE THAT WE ARE NOT DOING ENOUGH AS A COUNTRY TO MEET OUR INFRASTRUCTURE NEEDS

Source
Ipsos MORI

Base
1,001 GB adults 16-65 (online), 26 Aug-9 Sep 2016

Business and the government will be cheered that 76% of Britons are of the view that investment in infrastructure is vital to future economic growth, and there is recognition that action is needed. Sixty per cent agree that we are not doing enough as a country to meet our infrastructure needs. The need is considered so great that 44% of the British public believe we should borrow to fund this investment – substantially higher than the global and G8 averages (34% and 31% respectively) – while 16% are opposed and 40% are unsure either way. We are also open to the idea of foreign investment – 42% say they are fine with it if projects can be delivered more quickly as a result; 20% aren't. This makes Britons fairly pragmatic and a little more comfortable with foreign investment than G8 countries. However, government caution is warranted, as a significant 38% still aren't sure.

IT IS ALSO ABOUT THE WAY INFRASTRUCTURE IS DONE; THE WAY IT IS PLANNED, DELIVERED MANAGED AND EVALUATED

But the picture isn't all rosy. There are several challenges (and opportunities) facing any proposed investment in infrastructure. In particular, the image of infrastructure. Forty-eight per cent agree that Britain 'has a poor record at getting national infrastructure projects right' (only 12% disagree).

Despite the widespread media coverage of recent projects, many people are yet to form a solid opinion. At every turn, our survey picked up a large chunk of people struggling to give an answer one way or another. Infrastructure is not a word on everyone's lips and opinions are often very conditional on the detail.

This conditionality may be down to the local nature of infrastructure projects. Sixty-seven per cent justify delays to infrastructure projects if it means that local communities' views can be heard properly, a higher proportion than the 59% in G8 countries. The public are very sensitive to winners and losers. This can be seen in some of the reactions to the approval of plans for fracking in Little Plumpton. More generally, we find people anxious about change but also fearful of stagnation.

These factors make up a complex and changing socio-cultural backdrop that infrastructure leaders must navigate to 'land' projects so that they are accepted, if not always welcomed and cherished.

Building a narrative about better infrastructure for a better Britain will take concerted effort. This isn't just about communications, or PR, or reputation management, important though these are. It is also about the way infrastructure is done; the way it is planned, delivered, managed and evaluated.

The message from the public is 'get on with it (but do it right)'. The infrastructure story must be well told, but in the years ahead that story must turn into fact, not fiction. ●

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OUR SEASONAL LOOK AT POLITICIANS AROUND THE WORLD

BY MICHAEL CLEMENCE
Senior Research Executive
Ipsos Knowledge Centre

Source and base information and image credits for this chapter can be found on page 148

PEDRO PABLO KUCZYNSKI

PRESIDENT OF PERU

Popularity	**55%**
Unpopularity	**27%**
Majority	**-48**
Twitter followers	**679k**

COMEBACK OF THE YEAR

He trailed the first round of the presidential election with just 21% to Fujimori's 40%. He overturned it in the second round, albeit by the wafer-thin margin – of just 41,057 in an electorate of 17 million.

"Kuczynski's astonishing win has generated great expectations. But as his rival Fujimori's party won a majority in the Peruvian Parliament, he will need the support of public opinion to advance his policies. If he loses majority public support in 2017 he will find it very difficult to govern."

Alfredo Torres, Ipsos Peru

JUSTIN TRUDEAU

PRIME MINISTER OF CANADA

Popularity	**64%**
Unpopularity	**36%**
Majority	**13**
Twitter followers	**2.2m**

EXTENDED HONEYMOON

One year on, his latest poll ratings – 65% positive, with 63% saying his government is "full of great ideas" are the envy of almost all politicians everywhere.

"As 2016 comes to an end Prime Minister Trudeau's polling numbers are cause for celebration and concern.

On the issues that most worry Canadians – health care and job creation – the jury is still out. Will Canadians continue to enjoy their Prime Minister being fêted internationally, or will their parents' search for home care and their 27-year-old unemployed son's occupation of their basement become the lens through which they judge the government?"

Mike Colledge, Ipsos Canada

THERESA MAY

PRIME MINISTER
OF THE UNITED KINGDOM

Popularity	**48%**
Unpopularity	**32%**
Majority	**12**
Twitter followers	**182k**

THERE MAY BE TROUBLE AHEAD

Things are looking good: the largest lead over Labour since 2009, a 48% personal satisfaction rating (versus 28% under David Cameron). But talk of 'hard Brexit' and the tumbling pound has spooked the public and business already, and there is much more to come. 2017 won't be easy.

"Theresa May is ending 2016 still in her honeymoon period. However, past polling suggests that this will end soon and the big question is what happens once this wears off. Her challenge in 2017 is to negotiate an EU exit on terms that can satisfy all sides of a divided Kingdom, whilst preventing a recovery by the opposition Labour Party."

Gideon Skinner, Ipsos MORI

ROCK BOTTOM

2016 was not a good year for the Brazilian political class – it saw ex-President Rousseff impeached, new president Temer banned from standing for re-election, and 303 of 513 deputies in Congress currently facing criminal charges. No surprise then that 83% of Brazilians say the country's going in the wrong direction.

"2016 has been the low point for Brazilian politicians of all stripes. 2017 will shape the economic narrative as Brazil looks to the 2018 elections: Temer's government's reforms may please the markets but are unlikely to please the people too. Corruption remains a major issue – particularly if Temer or his cabinet are caught up in ongoing corruption investigations."

Danilo Cersosimo, Ipsos Brazil

MICHEL TEMER

PRESIDENT OF BRAZIL

Popularity	**31%**
Unpopularity	**59%**
Majority	**-189**
Twitter followers	**678k**

FRANCOIS HOLLANDE

PRESIDENT OF FRANCE

Popularity	**18%**
Unpopularity	**77%**
Majority	**3**
Twitter followers	**1.78m**

HOLLANDE FEELING LOW

His approval ratings tumbled into the red in August 2012, just two months after his election. They've stayed there ever since. Average public approval score during 2016 was 18%. The least popular President of the Fifth Republic.

"Caught between national pessimism and their drive to be personally happy, the French people are a paradox. They are terrified by President Hollande's political nightmare, yet fascinated by his colourful private life. In a country that has talked of 'crisis' for 40 years yet reacts with passivity and indifference to so much – one question remains: Is France an island? 2017 will tell."

Yves Bardon, Ipsos France

DEADLOCK DOWN UNDER

After gambling on an early election in July, he came out with a single-seat majority and personal approval ratings 13 points down on earlier in the year. Turnbull now has three years' breathing space, but little room for manoeuvre.

"Formerly an articulate critic of previous administrations and a long-time contender for top office, PM Turnbull has failed to manage his party's right wing or make headway on key policy areas. As we head into 2017, his key challenge is resolving the issue of same-sex marriage, which has become a political football in Australia."

Jessica Elgood, Ipsos Australia

MALCOLM TURNBULL

PRIME MINISTER OF AUSTRALIA

Popularity	**42%**
Unpopularity	**50%**
Majority	**1**
Twitter followers	**699k**

Who tops Trump?

HILLARY CLINTON

DEFEATED DEMOCRATIC NOMINEE FOR PRESIDENT OF THE UNITED STATES OF AMERICA

Popularity	**49%**
Unpopularity	**51%**
Majority	**-25**
Twitter followers	**10.8m**

SHATTERPROOF GLASS

In the year of the outsider, the ultimate political journeywoman simply had too much baggage. It was very close, but this willl be of no comfort. The Democratic Party's challenge for 2017 is how to recover, re-energise their base, and plan for mid-term elections.

"Clinton's campaign is peppered with 'what ifs', but hindsight is 20/20. While theories about her defeat abound, what is clear is that – not unlike Brexit – few in the media and Washington understand just how dissatisfied the electorate was with the status quo."

Julia Clark, Ipsos North America

TOP TRUMP

Trump's insurrection against the establishment carried him to the White House. His challenge for 2017 is to turn from bluster and divisive rhetoric to unite and lead: yet a Republican dominated House and Senate will reduce his need to compromise.

"With the Republicans also in firm control of both chambers, and at least one Supreme Court seat to fill, it is clear that 2017 will look very different politically to the past eight years in America."

Julia Clark, Ipsos North America

DONALD TRUMP

PRESIDENT-ELECT OF THE UNITED STATES OF AMERICA

Popularity	**43%**
Unpopularity	**57%**
Majority	**20**
Twitter followers	**14.2m**

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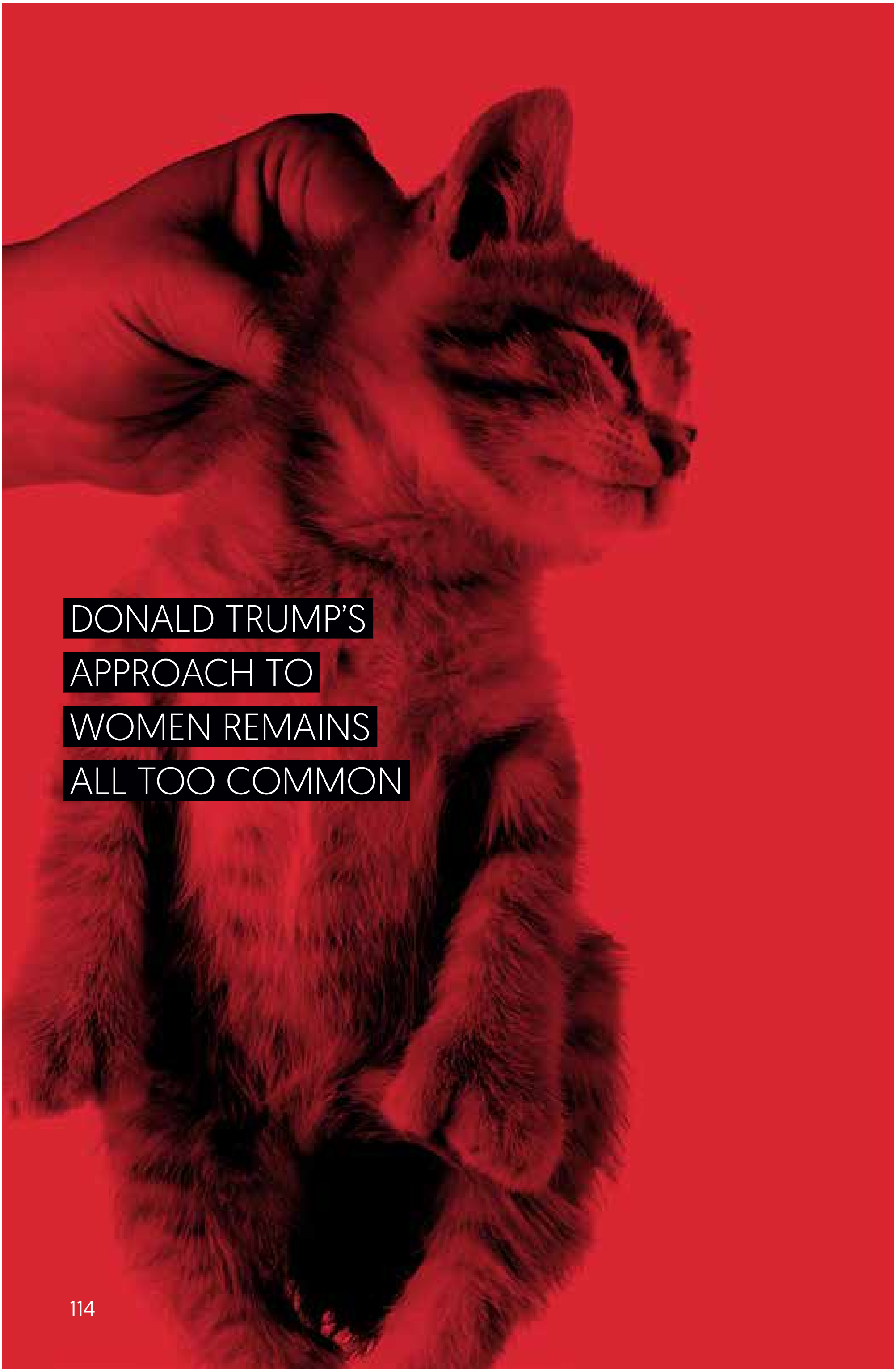
52% OF BRITISH WOMEN AGED 15 TO 24 HAVE ACCESSED SNAPCHAT IN THE LAST THREE MONTHS[50]



DONALD TRUMP'S APPROACH TO WOMEN REMAINS ALL TOO COMMON

WHAT MORE DO WE WANT? WOMEN IN 2016

BY AALIA KHAN
Senior Communications Executive
Ipsos MORI Social Research Institute

"Are you excited about becoming our first girl president?" Hillary Clinton remained stony faced when interviewed by Zach Galifianakis parodying an obnoxious talk show host. Until the American Electoral College chose Donald Trump as their 45th President, 2016 seemed like a golden era for representation of women in political life. The German Chancellor Angela Merkel presides over her European empire, Britain has just inaugurated its second female PM in the form of Theresa May, and Nicola Sturgeon stands at the helm of Scotland, a country that is central to the future of the United Kingdom.

When women aren't ruling today's power blocs, they are becoming increasingly visible leaders in medicine, business and institutions. In 2015, 62% of those enrolling in law courses were women.[51]

Things have really changed, haven't they?

But progress towards greater gender equality remains slow. To mark International Women's Day, we surveyed over 1,000 British adults for the Southbank Centre's Women of the World festival. We found that

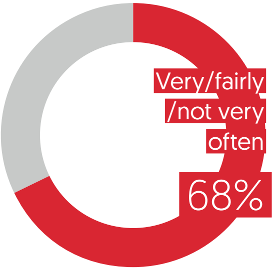
A STARTLING 87% OF WORKING WOMEN WITH CHILDREN IN THEIR HOUSEHOLD REPORT DIFFICULTIES WITH BALANCING WORK AND FAMILY LIFE

seven in ten people expect to wait longer than a decade to see equal numbers of male and female judges, chief executives and engineers – and around one in four expect to wait until at least 2036 for the gender gap to close. Today, only 23% of MPs are women. At the current rate of progress, it will take over a hundred years for gender parity in the House of Commons. This is far from surprising

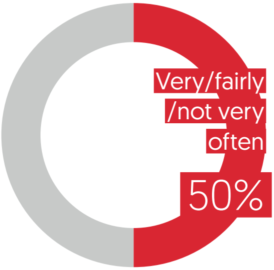
EXPERIENCE AND REACTION TO SEXISM AND DISCRIMINATION

How often, if at all, have you experienced...?

Unwanted sexual comments in public places



Unwanted sexual contact or advances in public places



Source
Ipsos MORI/ Southbank Centre

Base
487 women aged 18+ across Great Britain. 19-21 February 2016

when a startling 87% of working women with children in their household reported difficulties with balancing work and family life.

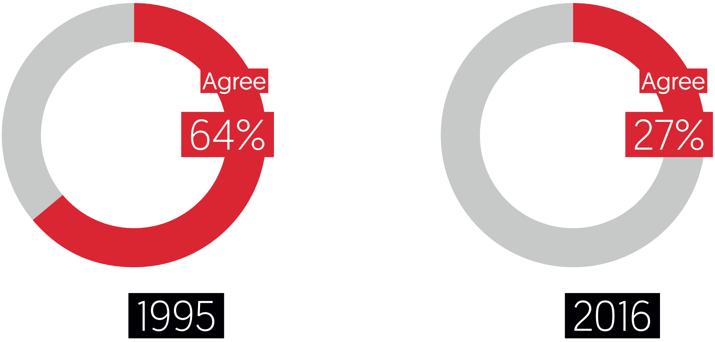
Moving away from the workplace, the perception is still bleak. Some 48% of women think there are more advantages to being a man in our society (compared to just 35% of men) – only eight percent think there are more advantages to being a woman. The unwanted advances described in Donald Trump's now-infamous 'Access Hollywood' tape are not alien to most women – seven in ten women say that they have received unwanted comments in a public place, with 22% reporting it happened often. Half said that they had experienced unwanted contact or advances.

The data paints a dark picture, but not one entirely without hope. People are generally more positive about the prospects for young women today compared to older generations. Some 60% of millennial men and women think that women will have a better life than those from their parents' generation.[52] Furthermore, only 17% of people still believe that a woman's place is at home (and they are mostly older people).

FEWER WOMEN THINK THAT MOST MEN ARE SEXIST TODAY THAN THEY DID IN 1995

To what extent do you agree or disagree with the following statement? (Agree)

"Most men are sexist"



Source
Ipsos MORI/ Southbank Centre

Base
1995: 1,039 women aged 18-64
2016: 345 women aged 18-64. 19-21 February 2016

Whether or not things are getting better for women, it is important to note that the conversation about gender equality has changed in recent years. Only 27% of women think that men are sexist – this compares to 64% in 1995. The renewed discourse on gender equality – with markers like the publication of Caitlin Moran's 'How to Be a Woman' and the launch of the Everyday Sexism Project – feels like it has moved away from the 80s power suits and an 'anti-men' perception. Donald Trump's defence of 'locker room' talk has been met with scathing terms like 'normalisation of rape culture' – language that would be alien to the capitalist post-feminist of the 90s. Similarly, when the Conservative leadership election was in danger of straying in to a Tea Party-style debate on motherhood, a vocal consensus from across the political and gender spectrum reminded us that parenting skills are not a competency in the PM's job description.

The visibility and position of women in all spheres of public life in 2016 is evidence of things getting better, but it is certainly not proof that the battle is over. Sexist language and behaviour is still widespread in our society. This year the father of a convicted sex offender attempted to use his son's swimming achievements as defence against his sexual assault of a young woman at a college party. The British tabloids are are still littered with scrutiny of women's appearance. One recent high-profile example was Prince Harry's accusation of "racial undertones" and "outright sexism" of the papers towards his new girlfriend Meghan Markle. There is still a strong undercurrent of undermining behaviour and language towards women, not least from the US President-elect. All of this should serve as a vital reminder that things haven't improved for everyone and there is still a long way to go in pursuit of equality.

What do we want? A lot more. ●

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20% OF MEN MOISTURISE THEIR FACE DAILY. 53% OF MEN DON'T MOISTURISE THEIR FACE AT ALL [53]

THE END OF THE UK – OR IS IT?

BY MARK DIFFLEY
Director
Ipsos MORI Scotland

In Scotland, Brexit may mean independence. So, why are we here, how likely is ‘indyref 2’, and what is the state of public opinion on the issue?

In the immediate aftermath of the referendum, resulting in Britain leaving the EU despite 62% of Scots voting to stay in, First Minister Nicola Sturgeon said that Brexit meant that indyref2 is now “on the table” as a means to “protect our place in Europe”.[54] Her stance was consistent with the SNP manifesto of 2016 which stated that the Scottish Parliament should have the right to hold another referendum in the event of “material change in the circumstance that prevailed in 2014, such as Scotland being taken out of the EU against our will”.[55]

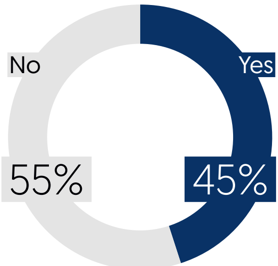
Polling conducted in the immediate aftermath of Brexit suggested that she may be pushing at an open door, as support for independence rose above 50%.[56]

However, since that initial post-Brexit bump, public opinion has returned to roughly where we were in September 2014, with

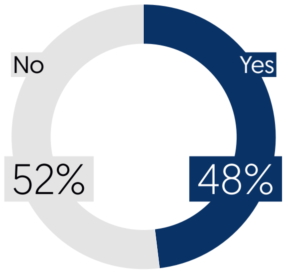
SHOULD SCOTLAND BE AN INDEPENDENT COUNTRY?

If a referendum were held tomorrow about Scotland's constitutional future, how would you vote in response to the following question: Should Scotland be an independent country?

All giving voting intention



All giving voting intention and certain/likely to vote



Source
Ipsos MORI Scottish Public Opinion Monitor

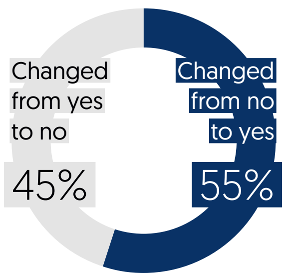
Base
All giving voting intention = 914. All certain to vote = 831; Data collected among 1,000 Scottish adults 16+, 5th – 11th September 2016

backers of the union in the majority. Moreover, the vote to leave the EU has not had the impact on support for independence that the First Minister would have hoped or expected. Indeed, while 15% reported that the vote to leave had changed their opinion on the Scottish constitutional question,[57] it didn't move voters uniformly

HOW HAS BREXIT CHANGED MINDS ON INDEPENDENCE?

As you may know, the UK voted to leave the European Union in a referendum held in June 2016. Did this event change how you would vote in a future referendum on Scottish independence or not?

All who changed their mind on independence



Source
Ipsos MORI Scottish Public Opinion Monitor

Base
All who have changed their mind on independence = 141. Data collected among Scottish adults 16+, 5 – 11 September 2016

41%

NOW SUPPORT A SECOND REFERENDUM IN THE NEXT TWO YEARS – DOWN FROM 48% BEFORE THE BREXIT VOTE

towards Leave – in fact nearly as many became more inclined to stay in the UK as switched to favour independence.

This should not be entirely surprising, since we know that the issue of EU membership was not one of the key determinants of voting in the 2014 independence referendum,[58] and because focus groups conducted before the EU referendum illustrated that Scots' support for Remain did not equate to positive attitudes towards or knowledge of the EU as an institution.

Equally worrying for the First Minister, enthusiasm for holding indyref2 also appears to be falling, with 41% now supporting a second referendum in the next two years, down from 48% before the Brexit vote.

But while public opinion does not appear to have shifted significantly since the Brexit vote, the rhetoric of the First Minister is undiminished, telling the recent SNP conference that "the time is coming to put Scotland's future in Scotland's hands".[59]

What is clear is that this will be a key judgement for the SNP to make. While those who support independence may feel emboldened by an enhanced democratic case for their argument in the wake of the vote to leave the EU, the broader economic case – vital in persuading voters to back them – does not appear to be any easier to make in the context of falling oil prices and economic uncertainty.[60]

Despite this, there is much to support an early second referendum. Starting a campaign at around 45% support is hardly a disaster. Campaigns can change opinions, as Brexit shows, and the prize is tantalisingly close; certainly much closer than it was at the beginning of the first referendum campaign when support for Yes languished at around 30 per cent,[61] only to finish at 45 per cent. The hurdle to get over this time is significantly lower.

Supporters of independence also have the wider political context in their favour. With SNP dominance at Holyrood and Labour in continued turmoil, as well as the SNP now having around 120,000 members, any new Yes movement has a distinct advantage in organisational and campaigning terms.

So, what are the chances of a second independence referendum in the foreseeable future? The First Minister faces a tough task in managing internal expectations to be bold and go for it, against a backdrop of public opinion which has not moved sufficiently to be confident of winning at this stage. Without that movement in attitudes she may conclude that it is a risk not worth taking for a while yet, although as events of the last year show, anything can happen. ●

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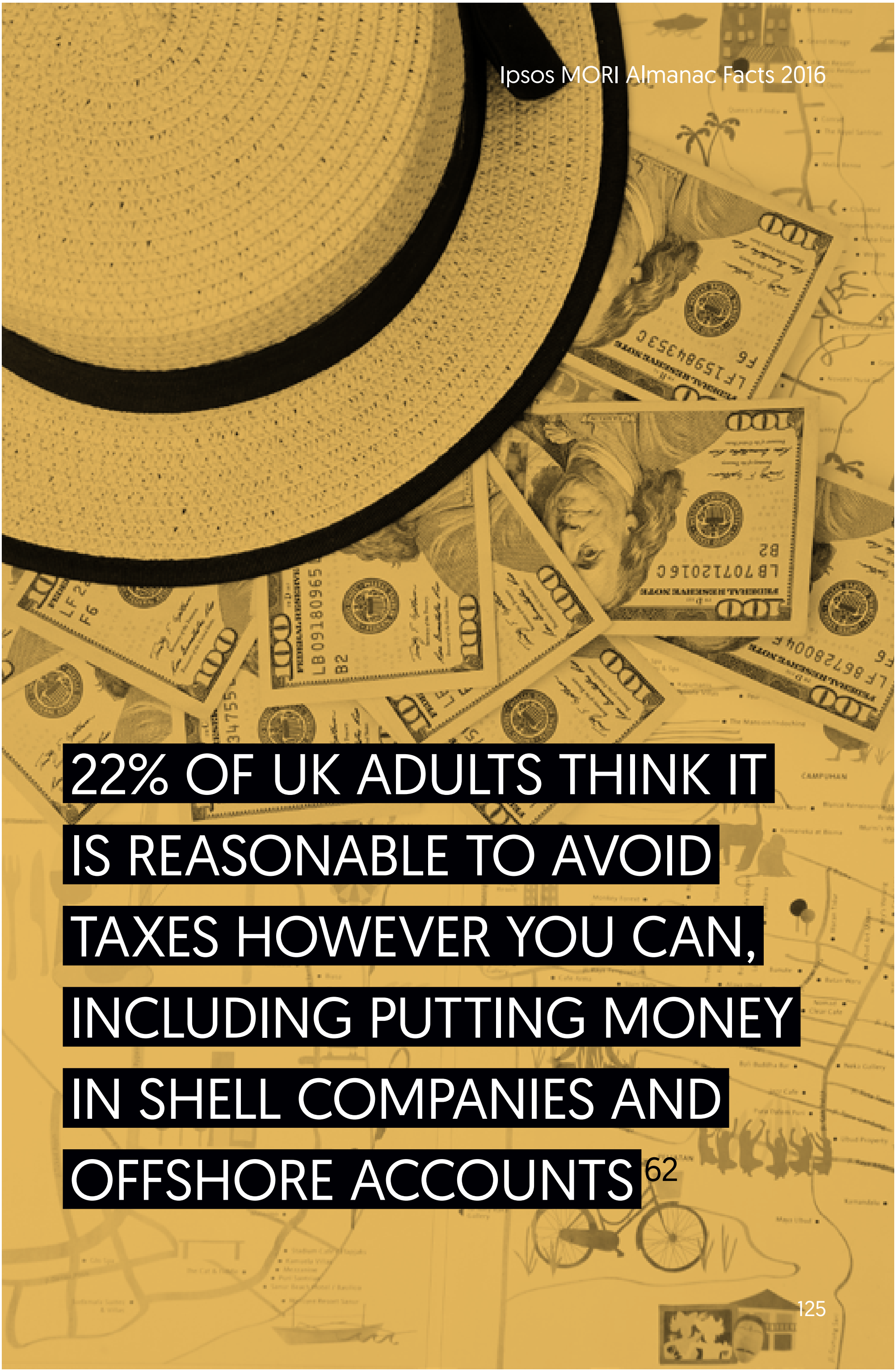

22% OF UK ADULTS THINK IT IS REASONABLE TO AVOID TAXES HOWEVER YOU CAN, INCLUDING PUTTING MONEY IN SHELL COMPANIES AND OFFSHORE ACCOUNTS[62]

IS YOUR CUSTOMER EXPERIENCE DESTROYING YOUR ADVERTISING?

BY TREVOR TAYLOR
Associate Director
Ipsos Loyalty

'I'm lovin' it', 'Be the fastest', 'Believe in better', 'Looking after your world'. Through advertising, brands often promote the perfect version of themselves to consumers and spend huge sums of money doing so. But what happens when, in reality, the customer experience is much less than perfect? Or, conversely, the experience is great, despite a poor initial expectation. This gap between expectation and reality is where customers can be won and lost and so is vitally important for businesses.

To get a better understanding of the opportunities and pitfalls of the gap, we talked to consumers who had recently had a positive or negative experience with a brand. The research shows us just what an impact one single customer experience can have on a brand.

Unsurprisingly, single customer experiences had little impact when they chimed with prior expectations – 98% of customers continued to have positive sentiment towards a brands after a positive experience, and 87% of those who had a bad perception of a brand continued to do so after a negative experience.

But when there is a gap between expectation and reality, a single customer experience can make or break brand perception. One positive customer experience was able to turn around a negative perception for nearly half of customers (49%). But this power can also work against brands – favourability dropped to just 43% in cases where customers with positive expectations had negative experiences.

Brands really are only as good as their last experience. When asked about the likelihood to be a customer of the brand in a year's time, previous perception of the brand is less of an influencer than the last customer experience. In conclusion, not only can the after-effect of a positive or negative customer experience be the

BUT WHEN THERE IS A GAP BETWEEN EXPECTATION AND REALITY, A SINGLE CUSTOMER EXPERIENCE CAN MAKE OR BREAK BRAND PERCEPTION.

making or breaking of a brand, in fact, in the short term at least, customer experiences *are* the brand.

To avoid falling into the trap, organisations need to ensure their 'brand promise' – what they 'sell' in marketing – is more aligned with the experience the company can consistently deliver. There is no point in a company creating a brand promise that is not achievable or based in reality. Our research shows that this is just destroying brand value. Instead companies should define the experience they want to provide us with, and crucially, are able to deliver – and then reflect this with their brand promise and advertising. ●

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FEWER THAN 1 IN 5 ADULTS IN THE UK ARE AWARE OF THE CALORIES IN BEER, DESPITE IT BEING ONE OF THE NATION'S MOST POPULAR BEVERAGES [63]

WILL THE MACHINES TAKE OVER OUR JOBS?

BY CAROLINE WALKER
Head of Clients
Ipsos MORI

People have always had a fascination with robots – from Da Vinci's automatons in the 15th century right the way through to Channel 4's biggest drama hit in 20 years, Humans, which is back for a second season.

The power and capability of robotics and computing is increasing at pace – Google Deepmind's AlphaGo programme finally beat Lee Sedol at the game 'Go' earlier this year, something programmes have aimed for since IBM's Deep Blue beat chess champion Garry Kasparov in 1995. Our fascination at this progress is certainly tinged with fear. While it may make for excellent TV, we are not comfortable with the idea of machines coming for our jobs, our partners and world domination.

The robot apocalypse is still (hopefully) a while off, so rather than hiding in a bunker and waiting for the end, we should instead look to the world of chess as an example of how to make the most of technology. Facing disarray after Kasparov's defeat, the new discipline of 'freestyle' chess has emerged – with teams of humans and machines competing together to bring chess to new heights.

YOU MIGHT BE FORGIVEN FOR THINKING THAT, LIKE CALL CENTRE WORKERS, THE DATA-HEAVY ROLE OF A RESEARCHER IS RIPE FOR BEING TAKEN BY A COMPUTER

The combination of man AND more intelligent machines, working together in perfect harmony, might give us that utopian future science fiction writers promised. By automating the calculations and drudgery we can have more time to spend doing the things we enjoy, or the things that we are uniquely good at, that computers can't – being creative.

You might be forgiven for thinking that, like call centre workers (as discussed in Sally Abernethy's article), the data-heavy role of a researcher is ripe for being taken by a computer. At Ipsos, we have been experimenting with the latest technology to explore how we can get to deeper, better insights around human behaviour, motivations or beliefs, and identifying where machines can do things better and where we humans can still add value.

Computers are ideal for collecting and creating more data sets. In a recent study for Orange we married together the use of heart rate monitors and passive mobile monitoring to enhance the more traditional approach of direct questions to participants, to explore the emotional impact of the UEFA Euro 2016 football tournament on fans. This allowed us to access new data sets and become smarter in how we understand people's natural behaviours, from within.

In a project for a major broadcaster, we were able to harness passive data collection. This replaced self-completed diaries, which in addition to being cumbersome and time consuming for the participants, are not always accurate. We can now use machine learning-based text analytics of verbatims and social media data to predict the success of new shows.

We have also used natural language processing to prompt customers, in real time, to give further, more specific feedback when responding to open-ended survey questions. The prompts are tailored based on previous responses (e.g. "You mentioned our staff, what about them impressed you?") to replicate the flow of a natural conversation. This simple but effective technology nudges the customer to develop or recall their thoughts and makes their survey experience more interactive, as well as producing a richer level of detail for our text analytics tools to mine.

What many of these techniques have in common is that they increase the volume of data that can be collected, and the speed at which it can be analysed. While these are undoubtedly positive things, there is still something missing – something that only humans can do. We can take all this data and put it in the wider context of the business problem at hand and offer actionable solutions. Arguably, it also takes the direct questioning, and intuition of a human, to uncover the core motivations, desires and perspectives of the participant on the issues being explored.

There will always be a need for human thinking around data, although algorithms can highlight patterns in data faster than ever. Robots are not taking over, but they can certainly improve our everyday jobs, as the research world is already discovering. ●

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WHAT HAPPENED WITH THE POLLING?

BY BEN PAGE
Chief Executive
Ipsos MORI

The result of June's referendum was a major shock for the political and business establishment, who apparently saw Britain voting to stay in the EU as a foregone conclusion. But if they did, their mistaken certainty cannot be blamed on the polls. Even though almost all of the final polls pointed towards a Remain win, most of them showed only a narrow margin. 11 of the 23 polls published in the last two weeks of the campaign had a Leave lead (including Ipsos MORI's penultimate poll, published on 16 June, which showed Leave at 53%).

The funny thing is, the public seem to have taken this in – even if the 'experts' didn't. Ten days before the vote, 47% told us a Remain win was more likely, and 38% a Leave win; 15% didn't know. No consensus of certainty here – less than half the public would even venture an opinion that Remain was the likeliest winner, let alone that it was a sure thing.

Our final forecast of 52% for Remain was neither the worst nor the best prediction. We had the wrong side ahead, but we said there was a 26% probability – one in four - that Leave could win, and pointed out that even in our final 22 June poll, 13% of voters said they might still change their minds. Our press release called it "a tight race" and the Evening Standard's report of our poll "nail-bitingly close".

HOW THE POLLSTERS DID

The error on remain reported by the major polling companies in their final poll before the June 23 EU referendum

	REMAIN	LEAVE	ERROR ON REMAIN	METHOD	SAMPLE SIZE	FIELDWORK
ORB	54	46	6	Telephone	877	14-19 June
Survation	51	49	2	Telephone	1003	20-June
ComRes	54	46	6	Telephone	1032	17-22 June
Opinium	49	51	1	Online	3011	20-22 June
YouGov	51	49	3	Online	3766	20-23 June
Ipsos MORI	52	48	4	Telephone	1592	21-22 June
Populus	55	45	7	Online	4740	21-22 June
RESULT	48	52				
AVERAGE ERROR			4.3			

Source
British Polling Council

None of that should obscure the fact that we don't think our final forecast was good enough. Here's how it happened. The data from our final poll was ambiguous, and we had to make a decision on how to interpret it. With the benefit of hindsight, of course, we can see that we made the wrong decision; had we read it differently, our forecast would have put Leave ahead.

Our problem, as in the US election, and in all elections, was how to allow for turnout: which of our respondents would actually vote in the end and which would not? Up to 2015, our practice was to

OUR PROBLEM, AS IN THE US ELECTION, AND IN ALL ELECTIONS, WAS HOW TO ALLOW FOR TURNOUT: WHICH OF OUR RESPONDENTS WOULD ACTUALLY VOTE IN THE END AND WHICH WOULD NOT?

ask people how likely they were to vote the next day, and exclude from our final figures those who were not ten out of ten "absolutely certain" to do so. Historically this had worked best. But in the 2015 election it was not accurate – more or less correctly measuring the Lib Dem and UKIP and Conservative share of the vote, but overstating Labour by 3.5%. After investigation we concluded that this was partly because our samples were not fully representative, and we have changed our procedures to correct that. But it was also clear we would have been more accurate had we taken account of what people told us about their past frequency of voting, as well as their likelihood to vote in this election. Being in the habit of voting makes a difference. So we changed our standard turnout filter: we included people who say they are only nine out of ten certain to vote, but we exclude those who say they only vote "sometimes" (or even less often) in general elections.

The irony is that, in the referendum, our old approach would have put Leave ahead, while the new one put Remain in the lead. Our new filter applied to the 2015 election results had worked better, and it now predicted a turnout pattern for the referendum similar to a general election turnout, which seemed plausible to us. We also noted that Remain supporters were more likely to say they thought the result was very important and we incorporated that as a factor in our forecast, increasing our predicted Remain share by a further percentage point.

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Of course, we had no experience of other comparable UK-wide referendums to help guide us. In the 2014 Scottish independence referendum (when our final poll gave one of the most accurate predictions), we saw late movement towards the status quo, matching experience from other referendums around the world. So in the EU referendum we were not surprised to find a Remain lead, after a narrow Leave lead in the previous poll. Whilst it had happened in Scotland, we and others were wrong to think it likely to apply to the UK as a whole.

In the end, the referendum turnout was 72% – higher than in the last five general elections, and with a significantly different pattern. We missed the higher than normal turnout among older working class voters (the group most opposed to EU membership), because they have often not bothered to vote in the past. If we had taken them at their word and believed they were certain to vote when they said so, we would have put Leave on 51%, not far from perfect.

Hindsight is a wonderful thing, but it teaches us important lessons – one is that we need to be much clearer about communicating uncertainty and judgement involved in polling elections in future! ●

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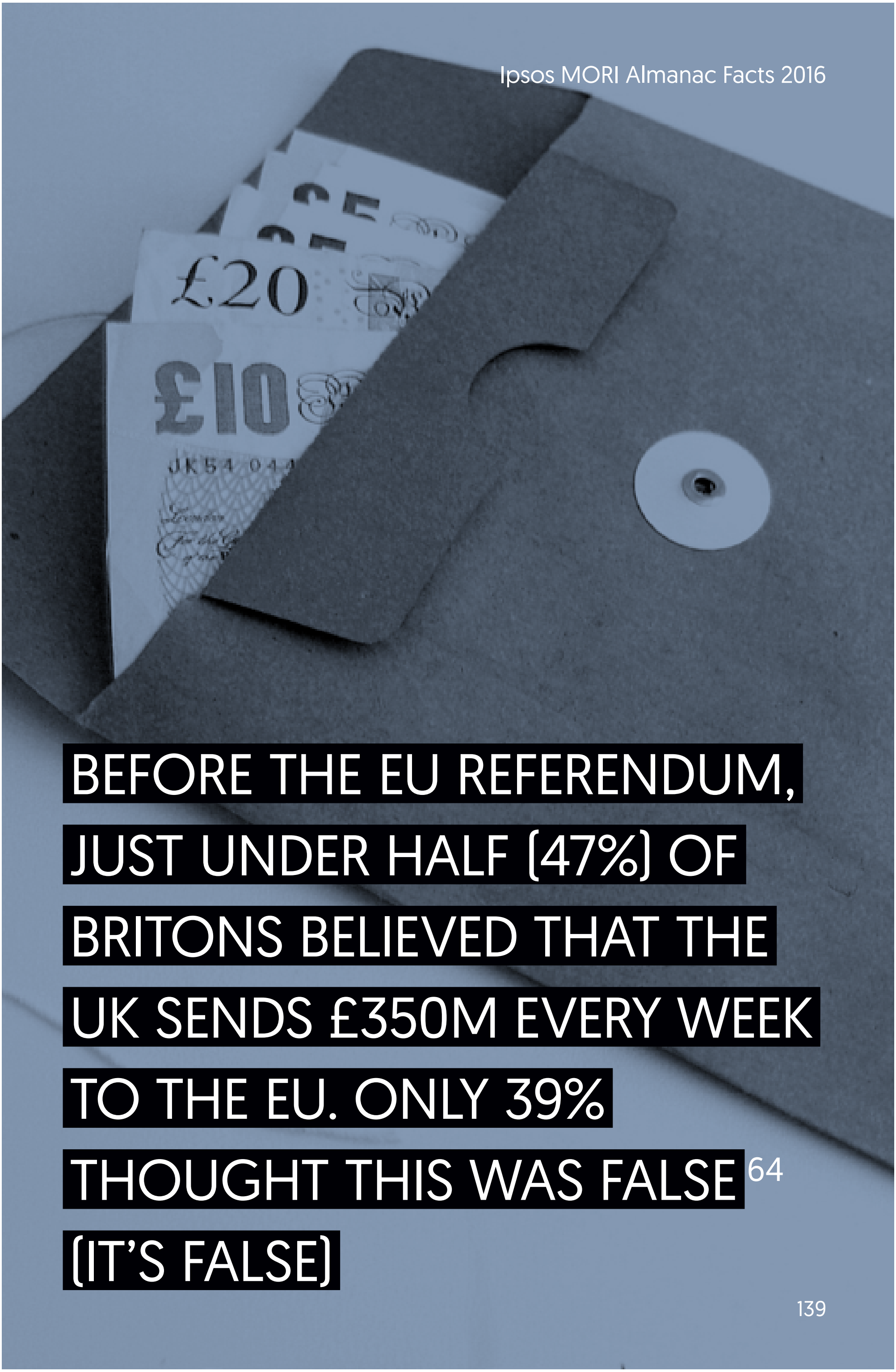

BEFORE THE EU REFERENDUM, JUST UNDER HALF (47%) OF BRITONS BELIEVED THAT THE UK SENDS £350M EVERY WEEK TO THE EU. ONLY 39% THOUGHT THIS WAS FALSE[64] (IT'S FALSE)

END NOTES

01. Credit where credit is due, the tweet was by @robboma3, although it is hard to be definitive on originality.

02. Despite the Prime Minister saying 'Brexit means Brexit'! Source: Joy Lo Dico, Evening Standard, 13.9.16. New entries included moobs, YOLO and the Westminster bubble. Meanwhile 'Brexit' has spawned 'Breget', 'Hard/soft Brexit', 'Brexodus' and many other derivatives.

03. In 2015, it was beaten into second place by an emoji http://blog.oxforddictionaries.com/2015/11/word-of-the-year-2015-emoji/, and according to @amybotwright on 15.7.16, there were "more UK tweets about Pokémon Go in the last 2 days than UK tweets about the EU referendum since January".

04. See, for example, Matthew Goodwin 'Why Britain backed Brexit' (1.7.16), and Stephen Bush http://www.newstatesman.com/politics/uk/2016/06/divided-britain-how-referendum-exposed-britains-culture-war

05. http://gladstonediaries.blogspot.co.uk/2016/06/democracy-and-disconnect-brexit-in.html

06. ‘Do your favourite brands show how divided Brexit Britain is?’ bbc.co.uk, 10.8.16.

07. http://spotlight.ipsos-na.com/index.php/news/its-nativism-explaining-the-drivers-of-trumps-popular-support/

08. https://fullfact.org/crime/hate-crime-and-eu-referendum/

09. A good example of this can be found in the excellent TED talk by Alexander Betts, June 2016, who calculated that he had visited the top 50 Leave areas just four times in his lifetime.

10. Sarah O’Connor, Financial Times, ‘The best economist is one with dirty shoes’, 19.7.16. See also Simon Roberts, ‘Knowing a Country: A Post-Brexit Polemic’, 27.6.16.

11. The research took place in August 2016. From a nationally representative quota sample of 2,155 British adults aged 16-75, questions on lunch break behaviours were filtered to 1,387 working adults. Data have been weighted by age, gender, region, working status and social grade to the known offline population profile. Of the 1,387 working adults interviewed, 1,335 reported that they take a lunch break while at work.

12. Mastercard / Ipsos MORI interviewed 2,155 British adults aged 16-75 online on their attitudes towards dating and paying the bill in August 2016.

13. https://www.marketingweek.com/2016/01/28/why-2016-will-be-a-breakthrough-year-for-virtual-reality/

14. http://www.goldmansachs.com/our-thinking/pages/technology-driving-innovation-folder/virtual-and-augmented-reality/report.pdf

15. http://ukie.org.uk/news/2016/07/consumer-vr-survey-%E2%80%93-results-ukie-member-discount

16. https://www.ipsos.com/vr-auto-industrys-sleeping-giant

17. http://blogs.lse.ac.uk/politicsandpolicy/anti-politics-after-the-referendum/

18. http://spotlight.ipsos-na.com/index.php/news/its-nativism-explaining-the-drivers-of-trumps-popular-support/

19. https://www.ipsos-mori.com/researchpublications/researcharchive/3771/Global-study-shows-many-around-the-world-uncomfortable-with-levels-of-immigration.aspx

20. Ipsos MORI / Deloitte. Source: UK edition, Deloitte Global Mobile Consumer Survey, May-Jun 2016. Weighted base: Respondents who own or have access to a smartphone (3,251).

21. Ipsos MORI interviewed a representative sample of 1,099 adults aged 16-75 across Great Britain. Data are weighted to match the profile of this population. Of those, 1,052 were British Citizens who were asked the follow-up questions. Interviews were conducted online, from 26th-29th July 2016. The question ("Which two or three of the following, if any, would you say makes you most proud to be British?") was asked of half the sample (524 British citizens).

22. Ipsos MORI / Deloitte. Source: UK edition, Deloitte Global Mobile Consumer Survey, May-Jun 2016. Weighted base: Respondents who own or have access to a smartphone (3,251).

23. http://www.telegraph.co.uk/news/2016/05/12/firm-accused-of-sexism-in-high-heels-row-forced-to-change-its-dr/

24. https://www.gov.uk/government/news/nicky-morgan-nowhere-left-to-hide-for-gender-inequality

25. https://www.ipsos-mori.com/researchpublications/researcharchive/3777/Women-still-face-more-pressure-to-look-groomed-new-poll-finds.aspx

26. http://www.nytimes.com/2016/10/16/fashion/meet-covergirls-new-cover-boy.html?_r=0

27. https://www.youtube.com/channel/UC_xJuxUjo5vLsf8W7vYdSvg

28. http://www.tradingeconomics.com/brazil/gdp-growth-annual

29. For an insider view on Brazil today, see our Ipsos Flair report: https://www.ipsos.com/flair-brazil-2017-debris-or-seeds

30. Social Media Sharing: Your invitation to the online conversation: October 2014.

31. The study consisted of three separate parts, consisting of a longitudinal survey of over 3000 people in England, Wales and Scotland who were surveyed one month before the charge, and then again one month and six months after the charge. A longitudinal diary-interview study was also undertaken by the researchers, which consisted of the completion of diaries by around 50 participants, followed by interviews before and after the charge. The final part of the study consisted of observations of shoppers exiting supermarkets in Cardiff and Bristol before and after the charge.

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33. Shltr.org.uk/ds4

34. https://www.theguardian.com/uk-news/2016/oct/17/property-rentals-to-outstrip-sales-for-first-time-since-1930s

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38. https://www.scientificamerican.com/article/patternicity-finding-meaningful-patterns/

39. https://www.amazon.co.uk/How-Know-What-isnt-Fallibility/dp/0029117062

40. https://en.wikipedia.org/wiki/Numerology

41. Ipsos Global Trends Survey. Base 1,00 adults in Great Britain, online, 1-15 October 2013, data is weighted.

42. https://www.ipsos-mori.com/Assets/Docs/Publications/Trump_Its_Nativism.pdf

43. http://www.ipsosglobaltrends.com/world-and-society.html

44. http://edition.cnn.com/2016/10/15/politics/donald-trump-broken-disaster/

45. Ipsos MORI interviewed a representative sample of 1,016 adults aged 18+ across Great Britain. Interviews were conducted by telephone: 14th – 17th October 2016. Data are weighted to match the profile of the population.

46. https://www.gov.uk/government/news/cma-paves-the-way-for-open-banking-revolution

47. http://www.bbc.co.uk/news/business-36268324

48. Ipsos MORI Political Monitor 1,002 adults aged 18+ across Great Britain. Interviews were conducted by telephone: 14th – 16th May 2016. Data are weighted to match the profile of the population. Theresa May: Ipsos MORI Political Monitor 1,016 adults aged 18+ across Great Britain. Interviews were conducted by telephone 14th – 17th October 2016. Data are weighted to the profile of the population.

49. Julian Francis, 'The age of May - and what it means for infrastructure', Infrastructure Intelligence, 7.10.16.

50. Ipsos Connect Tech Tracker, Q3 2016 (GB Face to Face survey via Ipsos MORI CAPIBUS)

51. http://www.lawsociety.org.uk/law-careers/becoming-a-solicitor/entry-trends/

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53. Ipsos MORI Omnibus, 440 adult males aged 16-75, 29 July - 2 August 2016.

54. http://www.bbc.co.uk/news/uk-scotland-36620375

55. http://www.snp.org/manifesto

56. http://www.telegraph.co.uk/news/2016/06/26/scottish-independence-has-nearly-60-per-cent-support-poll-finds/

57. https://www.ipsos-mori.com/researchpublications/researcharchive/3781/Brexit-does-not-trigger-significant-increase-in-support-for-independence.aspx

58. https://www.ipsos-mori.com/researchpublications/researcharchive/3743/The-Tinman-referendum-the-EU-debate-in-Scotland-is-lacking-heart.aspx

59. http://www.snp.org/nicola_sturgeon_address_to_snp16

60. http://www.bbc.co.uk/news/uk-scotland-37167975

61. https://www.ipsos-mori.com/researchpublications/researcharchive/3058/Support-for-independence-continues-to-fall-as-Labour-narrows-gap-with-SNP.aspx

62. International sample of 18,058 adults aged 18-64 in the US and Canada, and age 16-64 in all other countries, were interviewed. Approximately 1000+ individuals participated on a country by country basis via the Ipsos Online Panel with the exception of Argentina, Belgium, Hungary, India, Malta, Mexico, Peru, Poland, Russia, South Africa, South Korea, Sweden and Turkey, where each have a sample approximately 500+.

63. Ipsos MORI / AB Inbev. Consumers of alcoholic beverages aged 18-65 year old in Belgium, UK, Germany, France, Italy and Spain. 6,104 respondents, of which 1004 were from the UK, May 2015.

64. Ipsos MORI Political Monitor 1,257 adults aged 18+ across Great Britain. Interviews were conducted by telephone 11th – 14th June 2016.

Who tops Trump?

Pedro Pablo Kuczynski
Source: Ipsos Peru
Base: 1,289 adults aged 18+, 12-14 October 2016
Image credit: By Presidencia de Perú - https://www.presidencia.gob.pe/img/slide-11.jpg, CC BY 3.0, https://commons.wikimedia.org/w/index.php?curid=50379004

Justin Trudeau
Source: Ipsos Canada
Base: 1,000 adults aged 18+, 11–14 October 2016
Image credit: By Presidencia de la República Mexicana - Flickr, CC BY 2.0, https://commons.wikimedia.org/w/index.php?curid=50759009

Theresa May
Source: Ipsos MORI
Base: 1,016 British adults aged 18+, 14–17 October 2016
Image credit: By UK Home Office - https://www.flickr.com/photos/ukhomeoffice/21450866922, CC BY 2.0, https://en.wikipedia.org/w/index.php?curid=51065934

Michel Temer
Source: Ipsos Brazil
Base: 1,200 adults aged 16+, 1-12 October 2016
Image credit: By Licurgo.miranda - This file was derived from: Michel Temer planalto.jpg, CC BY-SA 4.0, https://commons.wikimedia.org/w/index.php?curid=41503958

Francois Hollande
Source: Ipsos France
Base: 957 adults aged 18+, 14-15 October 2016
Image credit: By COP Paris - Flickr.com, CC0, https://commons.wikimedia.org/w/index.php?curid=46756148

Malcolm Turnbull
Source: Fairfax/Ipsos
Base: 1,377 adults aged 18+, 26-29 June 2016
Image credit: By DoD photo by U.S. Army Sgt. First Class Clydell Kinchen - https://www.flickr.com/photos/secdef/24463397435/, Public Domain, https://commons.wikimedia.org/w/index.php?curid=46571322

Hillary Clinton
Source: Ipsos North America
Base: 3,198 adults aged 18+, 2-6 November 2016
Image credit: By United States Department of State - Official Photo at Department of State page, Public Domain, https://commons.wikimedia.org/w/index.php?curid=7526134

Donald Trump
Source: Ipsos North America
Base: 3,198 adults aged 18+, 2-6 November 2016
Image credit: By Michael Vadon - This file has been extracted from another file: Donald Trump August 19, 2015.jpg, CC BY-SA 2.0, https://commons.wikimedia.org/w/index.php?curid=42609338

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The Ipsos MORI Almanac is our light-hearted(ish) review of life, society, business, media and politics in 2016, with contributions and data from around the business and the world. In this dramatic year of political upheaval, we look at the forces driving these shifts as well as, among other things, myths about Millennials, the future of virtual reality and why it seems all our favourite celebrities are dying (we also look at where the polls went wrong – and right).

We hope you enjoy our 2016 Almanac. Please let us know what you think!

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